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National Arts Participation Survey 2022 – Victoria Research Report

Prepared for: Creative Victoria

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1 Research background and Methodology

1.1 Background

The National Arts Participation Survey (NAPS) is a periodic, large-scale research survey which aims to measure Australia's engagement with the arts and creative activities. This is the fifth study in the landmark NAPS series conducted by the Australia Council for the Arts periodically since 2009. The survey covers many aspects of artistic endeavour and measures public engagement in creative activities including music, visual art, theatre, dance and literature. Specifically, the NAPS seeks to measure the extent to which Australians attend events, as well as their creative involvement with these artistic forms. The survey also seeks to further understand Australians' perceptions and attitudes towards the arts and creative activities and experiences, and its place in our society.

Online fieldwork for NAPS 2022 was conducted from September 2022 through to October 2022 with a nationally representative sample of n=9,396 Australians aged 15 years and over. This includes completion of the main online survey, state and territory boosts in Tasmania, Victoria, ACT and Western Australia (n=500 for each jurisdiction) and surveys completed face-to-face with First Nations Australians living in regional locations (n=150). Two additional targeted samples are also completed using simplified surveys. This data has not been included in the main database, given the difference in how the questions are phrased. An Easy Read survey was completed by (n=93) people with cognitive impairment or intellectual disability; and a LOTE survey (translated into a number of languages other than English) was completed by (n=174) people from culturally and linguistically diverse backgrounds who are not fluent in English. These components are completed from September 2022 through to March 2023. A qualitative component to guide and shape the online survey was completed in August 2022. This included six focus groups with Australians with a moderate to high interest in the arts, and stakeholders and artists working in diversity sectors.

1.2 Objectives

NAPS 2022 aimed to provide benchmark measures on attitudes and participation in the arts and creative activities among Australians. The specific objectives of the research are to:

- Measure ongoing arts participation – both attendance and creation
- Measure attitudes and the perceived benefits and value of the arts to the public
- Measure online and digital engagement with the arts (expanded in NAPS 2022)
- Understand how measures have changed over time (tracking)
- Understand the impact of COVID-19 on arts attitudes and behaviours (new in 2022)

1.3 Impact of COVID-19

The previous wave of NAPS was completed in 2019, with fieldwork finalised before the end of the year. As such 2019 data provides a benchmark of Australians' attitudes and interaction with the arts and creative activities prior to the impact of COVID-19.

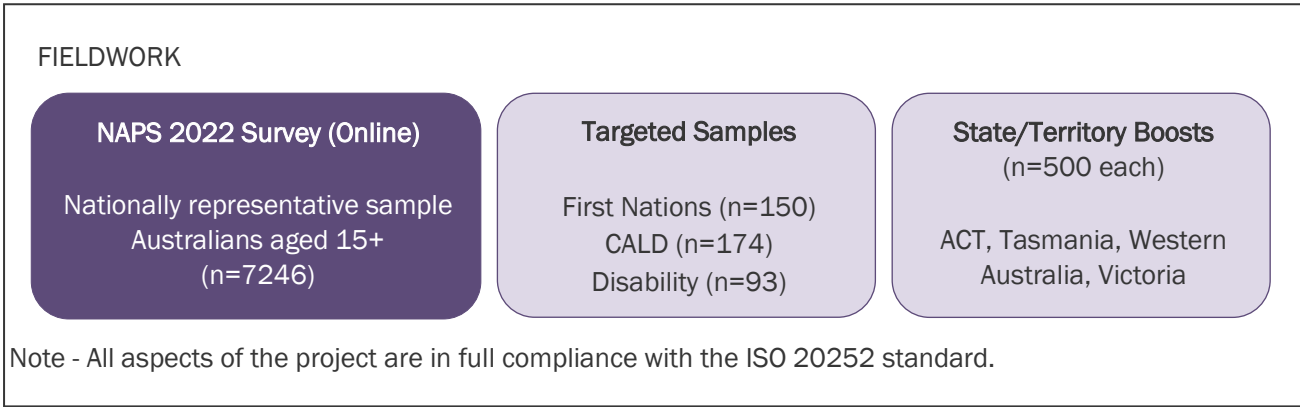
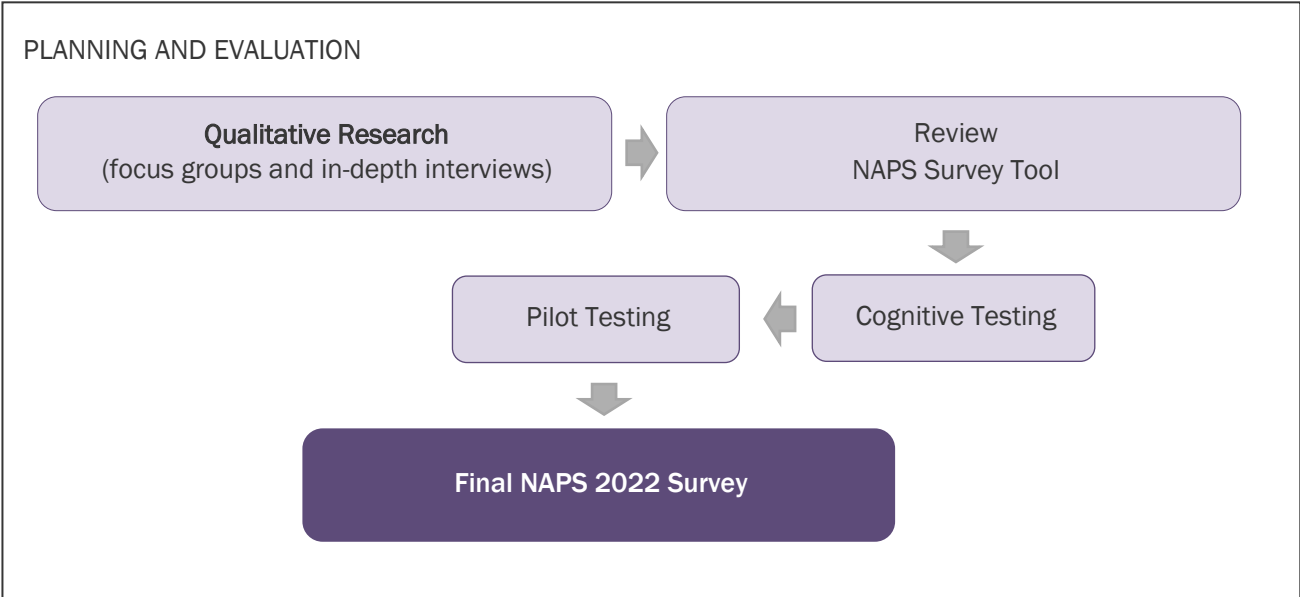
NAPS 2022 was the first to be completed post COVID-19. The fieldwork was completed at a time when many social restrictions had eased, however it needs to be remembered that NAPS asked respondents to consider their arts participation during the **past 12 months**, so NAPS 2022 represents the period from late 2021 to late 2022.

During this time, there are still various COVID-19 restrictions impacting arts events and social gatherings as well as limitations on the number and variety of arts and creative events on offer, all of which needs to be considered when interpreting the figures in NAPS 2022.

In order to capture the impact of COVID-19 and understand how this was impacting on NAPS measures across the board, a number of additional questions are added to the NAPS 2022 survey. NAPS benchmarked questions around attitudes and participation across art forms did not change to ensure tracking of those measures could continue. Some additional online and digital engagement questions are also added to the survey to reflect the growing engagement with these channels.

1.4 Research methodology

The overall methodology for NAPS 2022 was largely consistent with previous waves and in particular the approach taken in NAPS 2019. The key difference was the coverage in the qualitative components which focused on better understanding the impact of COVID-19 (in order to highlight potential new NAPS measures) and the rise and importance of digital and online art and creative content. In addition, diversity stakeholders are included in the qualitative sample for the first time.



1.4.1 Stage 1: Qualitative component – focus groups and in-depth interviews

The first stage of NAPS 2022 featured a qualitative component which included six focus groups amongst Australians and five in-depth interviews (IDIs) amongst stakeholders working in the arts

sector representing specific target groups and communities, including culturally and/or linguistically diverse Australians, those living with disability and First Nations Australians.

The qualitative component of NAPS 2022 was completed in August 2022 with all sessions conducted online using Microsoft Teams to allow for the inclusion of individuals from a wide mix of locations. First Nations interviews are conducted by a First Nations interviewer, with other qualitative sessions conducted by the Lonergan team.

The aim of the qualitative component was to explore the impact of COVID-19 on arts attitudes and participation and identify possible new measures for inclusion in the NAPS 2022 survey to allow any impacts to be quantified using survey questions. Qualitative sessions also explored the role and potential rise of online and digital arts engagement, how this impacted on experiences and opportunities to interact with, or create art, and whether digital or online engagement had increased or played a different role during COVID-19 lockdowns and restrictions. There was also a need to understand whether an increase in engagement through online and digital channels would continue (and to what extent) given what Australians saw as the benefits and drawbacks of these experiences. Again the aim was to uncover insights that could be measured and quantified in the NAPS 2022 survey.

Focus group sample

Focus groups are conducted amongst members of the Australian public who had different levels of engagement with the arts. All respondents had at least low-moderate involvement with the arts and had engaged with at least one art form in the past 12 months, with some engaging in digital art forms over the past 12 months.

Figure 1: Focus group structure

Gp		Location	Age, lifestage
1	Online	Regional	55+ (older family/retirement)
2	Online	Metro	18-29 year olds (pre/young family)
3	Online	Metro	55+ (older family/retirement)
4	Online	Metro	30-54 year olds (family/singles)
5	Online	Regional	30-54 year olds (family/singles)
6	Online	Regional	18-29 year olds (pre/young family)

The reason for recruiting focus group participants who had at least a low-moderate engagement in the arts was to ensure the sessions could be used to learn about the experiences Australians had with the arts and how attitudes and behaviours may have been impacted by COVID-19. Any hypothesis to emerge from focus groups could then be quantified amongst all Australians including those that have little to no interaction with the arts.

Stakeholder in-depth interview sample

Five interviews are conducted amongst stakeholders working in the arts sector, representing Australians living with disability and Australians from culturally and linguistically diverse backgrounds, and artists representing First Nations Australians.

Figure 2: In depth interview structure

First Nations Australians	Australians living with Disability	Culturally and linguistically Diverse backgrounds
2 First Nations artists <ul style="list-style-type: none"> • A musician – drummer and Indigenous storyteller • A multi-faceted artist producing performative cultural workshops and video storytelling 	2 individuals from organisations representing arts access and artists living with disability <ul style="list-style-type: none"> • Arts Access • Accessible Arts 	2 individuals from a peak body representing culturally and linguistically diverse artists <ul style="list-style-type: none"> • Diversity Arts Australia (peak body)

1.4.2 NAPS 2022 survey revisions and changes

Following the qualitative sessions new questions are added to the NAPS 2022 survey to capture how COVID-19 had impacted on Australian’s interaction with arts and creativity activities. Qualitative feedback did suggest there had been a number of shifts in behaviour, particularly around participation during lockdowns and restrictions, and it was important that the NAPS 2022 survey captured and measured these changes.

In addition, whilst COVID-19 was the main driver of change for the NAPS 2022 survey, questions are also asked regarding online and digital activity. The qualitative sessions confirmed that online and digital engagement in the arts was evolving and a growing area of interest and access for many people. There was also feedback that suggested that online and digital engagement had been boosted during COVID-19. Both these shifts are important to capture and measure in the NAPS 2022 survey. Additional question areas in the NAPS 2022 survey:

- How live attendance was perceived to have changed since COVID-19 (for each art form)
- Perceived cost of events since the COVID-19 pandemic and its impact on behaviour
- Expenditure on events and how this had changed compared to before the COVID-19 pandemic
- Willingness to spend more on arts events to support the arts
- Comfort and barriers around attending events in late 2022 (e.g. post COVID-19 lockdowns)
- Ways to reduce risk around attending events in late 2022
- Impact of arts on mental health and wellbeing during COVID-19 particularly during lockdowns
- How and why Australians used the arts during COVID-19 and particularly during lockdowns
- Discovery of new art forms during COVID-19 and particularly during lockdowns
- Use of online and digital channels during COVID-19, particularly during lockdowns
- Overall concerns around attending live events

Whilst additional questions are an important part of the NAPS 2022 data collection in that they add context to the benchmark measures, these questions may or may not be tracked or used in subsequent NAPS. It is likely that the online and digital questions will continue, but those focused on COVID-19 may be less relevant next time around.

1.4.3 Stage 2: NAPS 2022 Survey

General population Australians aged 15+

The second stage of NAPS 2022 was the collection of data using the quantitative survey. The main survey was administered online from 23 September to 31 October 2022 and took an average of 18

minutes to complete. A total of n=7,246 Australians aged 15 years and over participated in the survey, which was sourced from an established online panel provider.

Boosted state and territory samples

Four states/territories boosted samples in their jurisdictions by n=500. For smaller states and territories this was to ensure a robust sample size (e.g. Tasmania and ACT). For Western Australia the boost also included a request for specific representation of four regional areas and for Victoria the boost ensured specific areas within Melbourne are well represented.

Targeted samples

Whilst it is recognised that the online panel is able to capture the views of the general population, there is still an underrepresentation of some cultural groups (particularly where English is not spoken fluently), First Nations Australians living in more regional and remote locations and Australians living with disability, specifically those with cognitive impairment or intellectual disability. To reach these audiences and give them an opportunity to participate, other data collection methods are implemented. This included face-to-face interviews with First Nations Australians in regional and remote locations and a suitably simplified survey for self-completion (either online or using paper surveys) for cultural groups not fluent in English and Australians with cognitive impairment or intellectual disability.

First Nations Australians in regional and remote communities – face-to-face completion (full survey)

A series of n=150 face-to-face interviews are completed among First Nations Australians who live in regional and remote communities across four locations: Dubbo in New South Wales, Cairns and Yarrabah in Queensland, and Katherine in the Northern Territory. The fieldwork was managed by Russell Logan, our First Nation's partner who runs a team of highly experienced First Nations interviewers. iPads/tablets are used to enter survey responses directly into our online database. Interviewers assisted respondents to complete the survey by reading out questions and using relevant response showcards. Of the 150 completed surveys, 36 respondents are not classified as living in ARIAs 2, 3, 4, so in reporting where First Nations Australians in regional and remote communities are referenced, these 36 respondents are not included. Conversely, some of the responses received through our general population survey are from First Nations Australians living in ARIAs 2, 3 and 4, and these responses are added to reporting where First Nations Australians in regional and remote communities are referenced.

Australians from culturally and linguistically diverse backgrounds - LOTE survey

A simplified version of the full NAPS 2022 survey was developed and translated into a number of languages to encourage involvement among community groups not fluent in English. The aim was to capture the key NAPS measures whilst not making the survey too arduous and to ensure the survey was self-completed. The shortened LOTE surveys are translated into Arabic, Dinka, Mandarin, Spanish, Urdu and Vietnamese, reflecting both established and emerging communities in Australia. A total of 180 people from these communities who are not fluent in English completed the LOTE survey. Surveys are distributed through a range of multicultural community organisations and either completed via an online link or via a paper survey returned to Lonergan and entered into the online database.

Australians with cognitive impairment or intellectual disability – Easy Read survey

A simplified version of the full NAPS 2022 survey was developed using an Easy Read approach to enable the views of respondents with cognitive impairment or intellectual disability to be captured. A selection of key questions are simplified for use in the Easy Read format where pictures accompany each question and visualisations are used to aid responses. A sample of n=93 surveys are completed through three partner organisations. Developmental Disability Western Australia (DDWA) and Inclusion Australia promoted the research on their website and social media sites, and Social Butterfly (Victoria) assisted people to fill out the survey at organised events. Lonergan also accessed a number of respondents with an intellectual disability through its own consumer panels. Note that whilst Social Butterfly and DDWA provided some simple assistance accessing the survey, the Easy Read survey was completed by respondents as a self-complete survey.

As there are considerable differences between the main NAPS 2022 survey and the LOTE and Easy Read surveys these responses have not been included in the main sample for NAPS 2022 and have been reported on separately. Note however there is still representation of culturally and linguistically diverse respondents (referred to as CALD respondents) and Australians living with disability referred to as such in the report, these groups completed the main online survey. See Section 1.5 for a full breakdown of samples used in reporting.

Figure 3: Overall sample breakdown for NAPS 2022 survey completion

Collection method and sample		Total
Main sample	General population survey	
General population (nat rep)	Online consumer panel	n= 7246
State/territory boosts:		
WA	Online consumer panel	n= 500
ACT	Online consumer panel	n= 500
TAS	Online consumer panel	n= 500
Victoria	Online consumer panel	n= 500
Targeted First Nations Australians living in Dubbo, Yarrabah, and Katherine	Face to face interviewing (full survey)	n= 150
Australians 15+ (full survey)	TOTAL	n=9,396
Targeted group	Simplified survey	
Intellectual disability/cognitive impairment	Easy Read (simplified)	n= 93
Diverse language groups	LOTE survey (simplified)	n=174

Unweighted respondent profile

Figure 4: Respondent profile 2022 raw counts by Age and Gender

	Total (n=)	First Nations (n=)	CALD (n=)	Disability (n=)
Total	9,396	558	1,741	1,330
Age				

15-17 years	447	35	143	47
18-19 years	266	35	82	36
20-24 years	864	95	227	90
25-34 years	1789	138	403	186
35-44 years	1747	114	348	203
45-54 years	1343	76	226	192
55-64 years	1322	45	173	255
65+ years	1618	20	139	321
Gender				
Men	4435	272	842	623
Women	4901	280	883	693
Gender diverse	41	3	13	12

Figure 5: Respondent profile 2022 raw counts by Location

	Total (n=)	First Nations (n=)	CALD (n=)	Disability (n=)
Total	9,396	558	1,741	1,330
State/Territory				
NSW	2340	166	511	338
ACT	625	19	133	84
VIC	2339	70	452	313
QLD	1479	119	246	208
SA	528	22	68	81
WA	1310	55	240	179
TAS	668	57	70	118
NT	107	50	21	9
Location*				
Metro	6482	259	1395	829
Regional	2714	241	307	483
Remote	200	58	39	18

* The Australian Bureau of Statistics (ABS) uses The Australian Statistical Geography Standard (ASGS) Remoteness Structure to divide Australia into five classes of remoteness on the basis of a measure of relative access to services: major cities, inner regional, outer regional, remote and very remote. Respondent postcodes are used to allocate respondents to one of the five Remoteness Areas.

Figure 6: Victoria Respondent profile 2022 raw counts

	Total VIC (n=)	Total Melbourne (n=)	Melbourne – inner metro (n=)	Melbourne – middle metro (n=)	Melbourne – outer metro (n=)	Melbourne – growth metro (n=)	Regional VIC (n=)
Total	2,339	1,838	261	703	460	414	501
Age							
15-17 years	112	94	8	38	22	26	18
18-19 years	70	56	3	18	17	18	14
20-24 years	219	186	30	72	49	35	33
25-34 years	443	374	62	143	87	82	69
35-44 years	444	364	56	136	99	73	80
45-54 years	314	241	38	100	48	55	73
55-64 years	337	244	34	85	67	58	93
65+ years	400	279	30	111	71	67	121
Gender							
Man or male	1,135	893	132	339	226	196	242
Woman or female	1,189	933	126	360	232	215	256
Other	11	10	3	4	1	2	1

1.4.4 Stage 3: Audience data and advocacy tools

The third stage of the project included the development of audience data and advocacy tools. In 2019, Lonergan undertook a series of statistical analyses using an iterative process with Council. The output was three statistically based audience data and advocacy tools that can be used by Council to better understand engagement with the arts and guide strategies to communicate with Australians about the sector. These advocacy tools are replicated as part of NAPS 2022.

For the 2022 NAPS, these tools included:

1. **Population segmentation** reflecting how Australians cluster together on a range of measures. Five consumer segments are identified ranging from little/no interest in the arts through to arts advocates.
2. **Consumer engagement indexes**
 - Behavioural Index reflecting how often people engage with the arts
 - Attitudinal Index reflecting people’s support of the arts and belief in its value

1.5 Reporting

The focus of the 2022 report is to understand Australians’ engagement and perceptions towards arts and creative activities as captured in the NAPS survey including specific impacts of COVID-19 and new interest in digital arts and creative activities.

Along with survey results, this report incorporates findings from pre-survey qualitative research based on focus group discussions and interviews with stakeholders and artists working in diversity sectors. The report also includes the post-survey statistical analysis that was used to develop the advocacy tools showing how Australians differ across the consumer segmentation and engagement indexes.

Report terminology

Terminology use for reporting sample is provided below.

Figure 7: Report terminology for different target groups

Gp	Report Terminology	Survey	Total
1	First Nations Australians	General population survey (n=408) Targeted face to face survey (n=150)	n=558
2	First Nations Australians living in remote/regional (ARIA 2-4)	General population survey (n=66) Targeted face-to-face survey (n=114)	n=180
3	Australians living with disability	General population survey	n= 1,330
4	Targeted Australians with intellectual disability or cognitive impairment	Easy Read survey	n=93
5	CALD Australians	General population survey	n=1,741
6	Targeted CALD Australians from diverse language groups (not fluent in English)	LOTE Survey	n=174

Definitions key

- 1 Z6. Are you of Aboriginal and/or Torres Strait Islander origin?
- 2 Z6. Are you of Aboriginal and/or Torres Strait Islander origin? And living in ARIAS 2-4 outer regional, remote, very remote
- 3 Z5. Do you identify as a person with disability and/or do you experience barriers which limit the activities you participate in or attend unless access and/or support is provided?
- 4 People who have intellectual disability or cognitive impairment recruited via community groups or Lonergan panel.
- 5 Z7. Do you identify as a person from a culturally and linguistically diverse background?

Weighting

The final dataset was weighted to the same profile used for the sampling frame, with a cell-weighting methodology applied based on gender, age and location. This ensures the final weighted sample is representative of the Australian population aged 15+ years. The weighting profile is based on ABS data, which is based on the 2019 Census.

Note about representativeness

NAPS 2022 was sampled and weighted to be nationally representative based on age, gender and location (by states and territories and metropolitan/regional Australia). While it is representative of Australians as a whole, it is not necessarily representative of any particular sub-group as described below. In this report, findings are presented for First Nations respondents, where a proportion of surveys are completed via the mainstream panel, with participation boosted using a face-to-face interviewing method. While this approach has resulted in increased representation of First Nations Australians, we cannot claim to be statistically representative. The findings are thus indicative, and the data should be used as a guide, not an absolute.

Statistical significance

The National Arts Participation Survey uses a nationally representative sample of respondents to understand the Australian population as a whole. Statistical significance is a test of how likely differences identified between different groups reflect a true difference in the Australian population (rather than chance differences in the respondents in each sample). All differences reported in this publication are statistically significant at 95% confidence level. The findings presented, and themes discussed, are based on the data that has significant differences.

Where a 1 or 2 percentage point difference is statistically significant it has been reported as a change since 2019, however if the same percentage point difference is not statistically significant (based on the sample size), this will be reported as unchanged, or consistent with 2019.

Effect of rounding

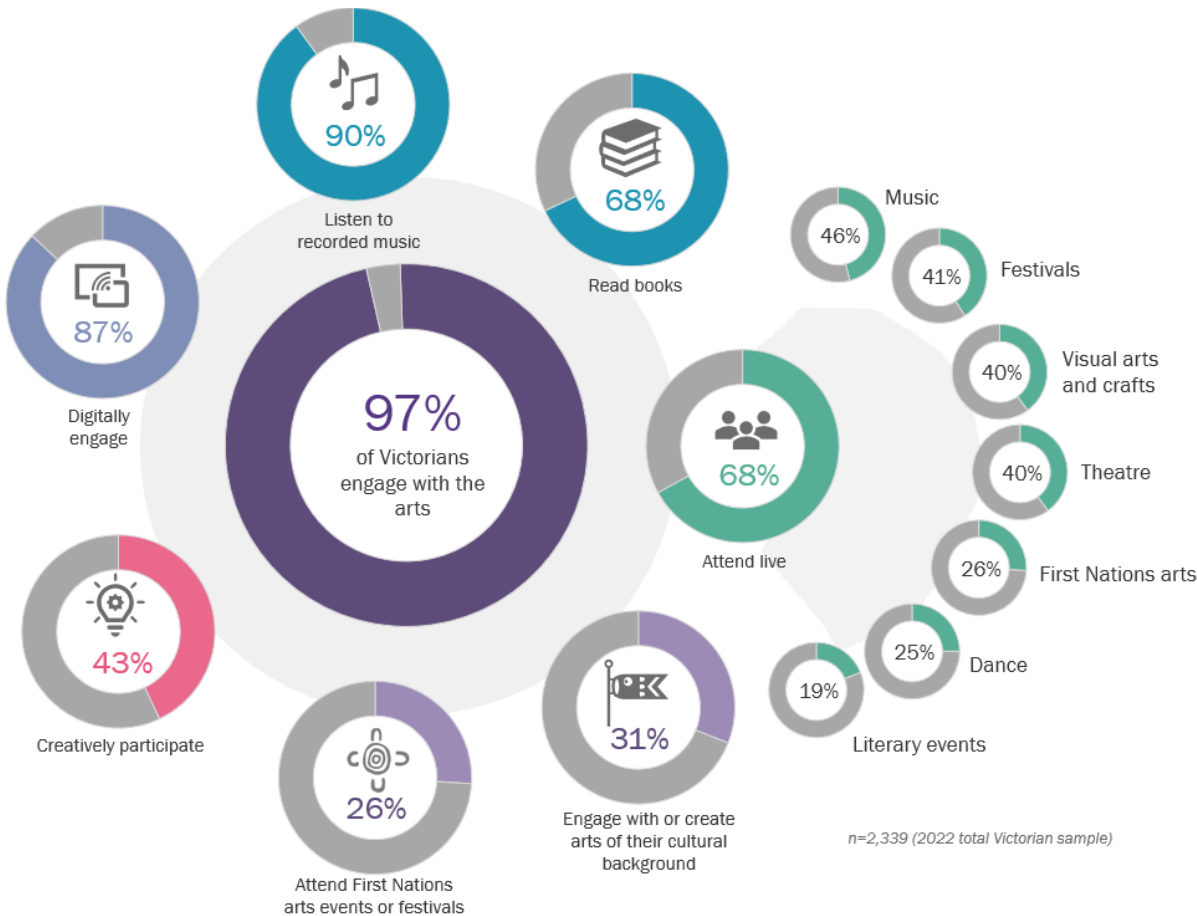
The sum of the individual components of a question may be different ($\pm 1\%$) to the aggregated data for that question due to rounding error. The results of survey responses are reported in the figures throughout the document as percentages that have been rounded up or down to the nearest whole number.

2 Australians' engagement with Arts

2.1 Overview of engagement

The 2022 National Arts Participation Survey found that the arts have a place in the lives of 97% of Victorians, the same proportion of engagement pre-COVID, reinforcing the importance of the arts in our everyday lives.

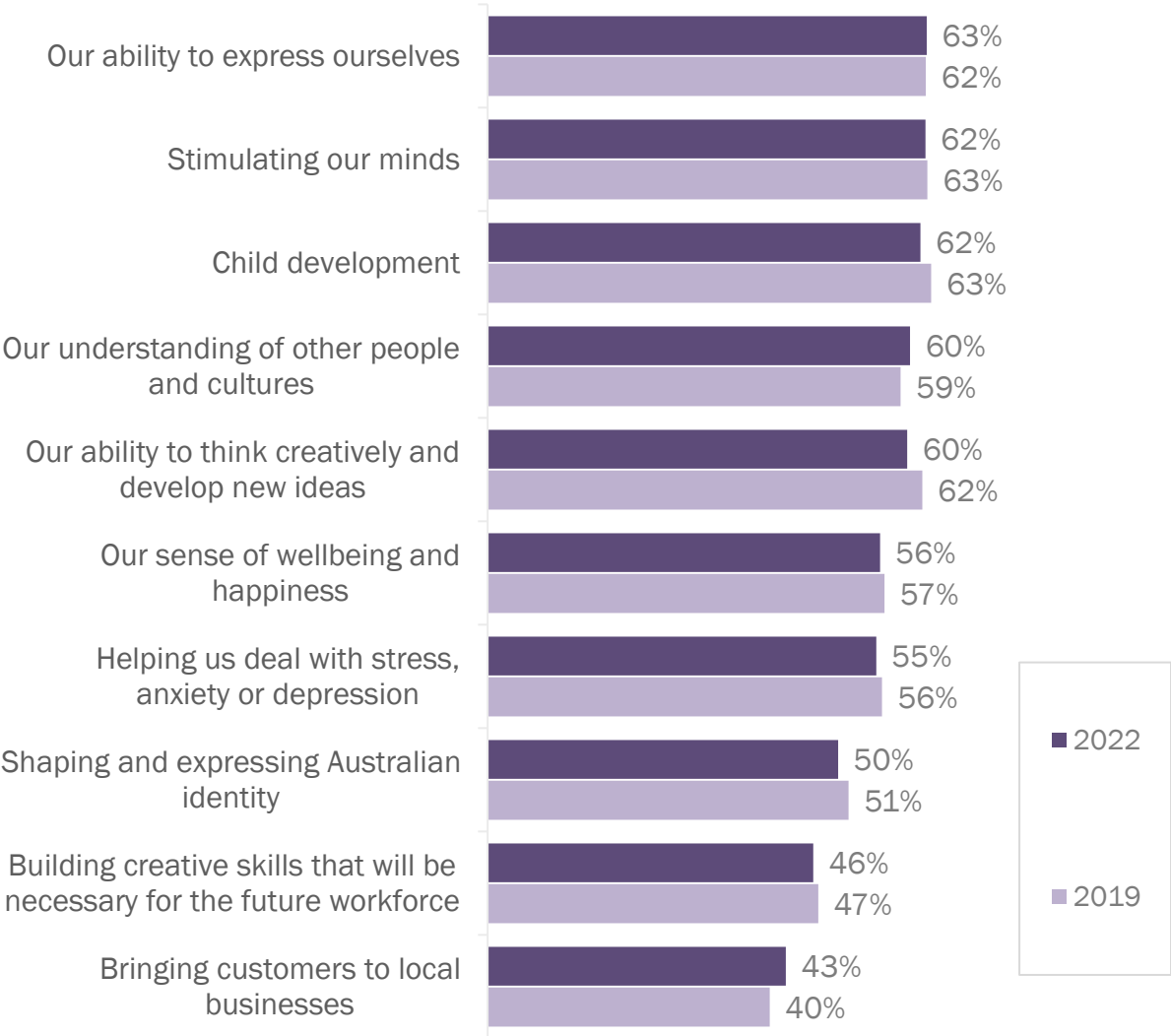
Figure 8: Victorians' overall engagement in creative and artistic activities and events in 2022



2.2 The value of arts

In 2022, over 4.47 million (4,473) Victorians acknowledge the significant positive impact that the arts have, or 84% of the population aged 15 years and over. This is consistent with 84% in 2019. This is also consistent with the overall Australian data (84% in 2022, 84% in 2019).

Figure 9: Proportion who felt the arts had a 'big' or 'very big' impact on various areas 2019 and 2022



Q54. How much impact do you think creativity and the arts have in the following areas? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

Figure 10: Impact of the arts 2022

Impact on areas (A very big impact, A big impact)	Australia Total	VIC Total	VIC	
			Melbourne	Regional VIC
Our ability to express ourselves	62%	63%	63%	61%
Stimulating our minds	62%	62%	63%	61%
Child development	61%	62%	61%	64%
Our understanding of other people and cultures	60%	60%	61%	58%
Our ability to think creatively and develop new ideas	59%	60%	60%	59%
Our sense of wellbeing and happiness	56%	56%	57%	54%
Helping us deal with stress, anxiety or depression	56%	55%	56%	55%
Shaping and expressing Australian identity	51%	50%	50%	48%
Building creative skills that will be necessary for the future workforce	46%	46%	47%	45%
Bringing customers to local businesses	43%	43%	42%	43%
At least one area	84%	84%	85%	80%

Q54. How much impact do you think creativity and the arts have in the following areas? Base: 2022 Australia Data (n=9,396) // 2022 VIC data (n= 2,339) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 11: Impact of the arts 2022 – Melbourne breakdown

Impact on areas (A very big impact, A big impact)	VIC Total	Melbourne			
		Inner metro	Middle metro	Outer metro	Growth metro
Our ability to express ourselves	63%	61%	65%	61%	63%
Stimulating our minds	62%	63%	63%	64%	60%
Child development	62%	60%	61%	60%	62%
Our understanding of other people and cultures	60%	63%	60%	60%	61%
Our ability to think creatively and develop new ideas	60%	58%	60%	62%	60%
Our sense of wellbeing and happiness	56%	58%	57%	56%	56%
Helping us deal with stress, anxiety or depression	55%	56%	56%	55%	55%
Shaping and expressing Australian identity	50%	51%	50%	50%	51%
Building creative skills that will be necessary for the future workforce	46%	50%	46%	45%	49%
Bringing customers to local businesses	43%	40%	43%	42%	44%
At least one area	84%	85%	84%	87%	84%

Q54. How much impact do you think creativity and the arts have in the following areas? Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

2.3 Attitudes about the arts

Agreement is highest for the following four statements, with at least seven in ten, strongly agreeing or agreeing:

- creative activities should be an important part of education (74%, up from 73% in 2019)
- artists should have freedom of expression (73%, down from 75% in 2019)
- artists make an important contribution to Australian society (72%, up from 70% in 2019)
- cultural and creative experiences help you to understand perspectives that are different to your own (70%, consistent with 70% in 2019)

Over three in five VIC residents aged 15 years and over strongly agree or agree that:

- cultural and creative experiences make for a richer and more meaningful life (68%, consistent with 67% in 2019)
- the arts in Australia reflect the diversity of cultures present in Australia (68%, consistent with 69% in 2019)
- culture and creativity should receive public funding (61%, down from 63% in 2019)

Agreement is lowest for the following three statements:

- cultural and creative experiences allow me to connect with others (56%, up from 53% in 2019)
- there are plenty of opportunities for me to get involved in the arts (43%, down from 46% in 2019).

There has been no significant change in the proportion of VIC that are disconnected with the arts, with almost three in 10 agreeing that *the arts are not really for people like me* (28%, down from 30% in 2019).

Figure 12: Attitudes about the arts 2022

Attitudes about the arts (Strongly Agree, Agree)	Australia Total	VIC Total	VIC	
			Melbourne	Regional
Creative activities should be an important part of education	74%	74%	74%	73%
Artists should have freedom of expression	74%	73%	73%	72%
Artists make an important contribution to Australian society	72%	72%	73%	69%
Cultural and creative experiences help you to understand perspectives that are different to your own	71%	70%	71%	66%
Cultural and creative experiences make for a richer and more meaningful life	69%	68%	68%	65%
The arts in Australia reflect the diversity of cultures present in Australia	68%	68%	69%	65%
Culture and creativity should receive public funding	61%	61%	62%	56%
Cultural and creative experiences allow me to connect with others	56%	56%	58%	51%
There are plenty of opportunities for me to get involved in cultural and creative experiences	44%	43%	44%	38%
Cultural and creative experiences are not really for people like me	28%	28%	28%	27%

Q53. Thinking about all the expressions of creativity, culture and the arts we have been looking at, how much do you agree or disagree with the following statements? Base: 2022 Australia Data (n=9,396) // 2022 VIC data (n= 2,339) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 13: Attitudes about the arts 2022 – Melbourne breakdown

Attitudes about the arts (Strongly Agree, Agree)	VIC Total	Melbourne			
		Inner metro	Middle metro	Outer metro	Growth metro
Creative activities should be an important part of education	74%	77%	73%	74%	74%
Artists should have freedom of expression	73%	75%	72%	73%	74%
Artists make an important contribution to Australian society	72%	73%	73%	71%	74%
Cultural and creative experiences help you to understand perspectives that are different to your own	70%	73%	72%	68%	72%
Cultural and creative experiences make for a richer and more meaningful life	68%	73%	70%	65%	66%
The arts in Australia reflect the diversity of cultures present in Australia	68%	70%	68%	68%	70%
Culture and creativity should receive public funding	61%	69%	63%	58%	60%
Cultural and creative experiences allow me to connect with others	56%	59%	60%	57%	55%
There are plenty of opportunities for me to get involved in cultural and creative experiences	43%	52%	46%	42%	39%
Cultural and creative experiences are not really for people like me	28%	27%	29%	29%	28%

Q53. Thinking about all the expressions of creativity, culture and the arts we have been looking at, how much do you agree or disagree with the following statements? Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

2.4 The arts and wellbeing

One of the major themes to emerge from NAPS 2022 was the relationship between arts and mental health and wellbeing.

NAPS has always taken measures on the **value and impact of arts** on our health and wellbeing and these measures have largely remained unchanged in NAPS 2022 (e.g. just over half of Australians (15+) support these statements). However, there are some groups that scored these statements more highly in 2022 including women (compared to men), parents with children under 16, Australians under 50, CALD and First Nations Australians. These groups are more likely to agree and support the impact of arts and cultural and creative experiences on wellbeing.

As noted earlier, Australians recognise the role the arts play in supporting our wellbeing:

- How much do you agree that *Cultural and creative experiences make for a richer and more meaningful life* (69% agree, unchanged from 2019)
- How much do you agree that *Cultural and creative experiences allow me to connect with others* (56% agree, up 2% from 2019)
- How much impact do you think *Creativity and the arts has on our sense of wellbeing and happiness* (56% agree, unchanged from 2019)
- How much impact do you think *Creativity and the arts has on helping us deal with stress, anxiety or depression* (56%, unchanged from 2019)

Amongst those living in VIC, they value the arts in support to wellbeing:

- How much do you agree that *Cultural and creative experiences make for a richer and more meaningful life* (68% agree, consistent with 67% in 2019)
- How much do you agree that *Cultural and creative experiences allow me to connect with others* (56% agree, increase from 53% in 2019)
- How much impact do you think *Creativity and the arts has on our sense of wellbeing and happiness* (56%, consistent with 2019 at 57%)
- How much impact do you think *Creativity and the arts has on helping us deal with stress, anxiety or depression* (55%, consistent with 56% in 2019)

In addition to benchmark measures, NAPS 2022 asked Australians specifically about the importance of arts to our **mental health and wellbeing during COVID-19** including during lockdowns and restrictions. The reasons/motivations for engaging with the arts and creative activities were a positive impact on mental health and wellbeing.

- Nearly half (48%) or 9.9 million Australians aged 15 or over believe creative activities and experiences helped with their mental health or wellbeing during COVID-19.
- For young Australians aged 15–24 years the results were even clearer with three in five agreeing that *Creative activities and experiences helped with their mental health or wellbeing* during the pandemic (61%, 13 percentage points higher than the proportion of Australians overall).
- First Nations Australians also strongly supported the arts as a positive contributor to their mental health and wellbeing during COVID-19 with 77% agreeing that *Creative activities and experiences helped with my mental health and wellbeing* (29 percentage points higher than Australians overall).
- 46% of Australians also believed that *Creative activities and experiences* gave them something meaningful to do during COVID-19 and stay-home restrictions.
- A third (35%) or 7.2 million Australians aged 15 or over found arts and creative activities helped them *Stay connected to family and friends*.
- 48% of those living in VIC believe creative activities and experiences helped with their mental health or wellbeing during COVID-19

3 Financial support for the arts

3.1 Public and private funding

In terms of allocation of funding for the arts, there are two clear areas of preference. Firstly, 3.63 million Victorians, or 68% of the population aged 15 years and over acknowledge that cost may be a barrier for some people and believe that ensuring accessibility for all, regardless of financial circumstance is the highest priority when it comes to investment into the arts. Secondly, 3.31 million Victorians (62%) prioritise the importance that the arts play in the lives of young people.

Allocation of funding in order of importance:

1. Ensuring free or low-cost events are available (68% ranked in top 3)
2. Ensuring children and young people have access to art and creative experiences to support learning and development (62% ranked in top 3)
3. Ensuring art and creative experiences are available to support people's health and wellbeing (48% ranked in top 3)
4. Investing in the making of art so it can be widely shared and experienced (37% ranked in top 3)
5. Funding art in public spaces (32% ranked in top 3)
6. Ensuring there is more access to creative activities and experiences online (27% ranked in top 3)
7. Supporting art that pushes boundaries and drives innovation (24% ranked in top 3)

Figure 14: Public and private funding 2022

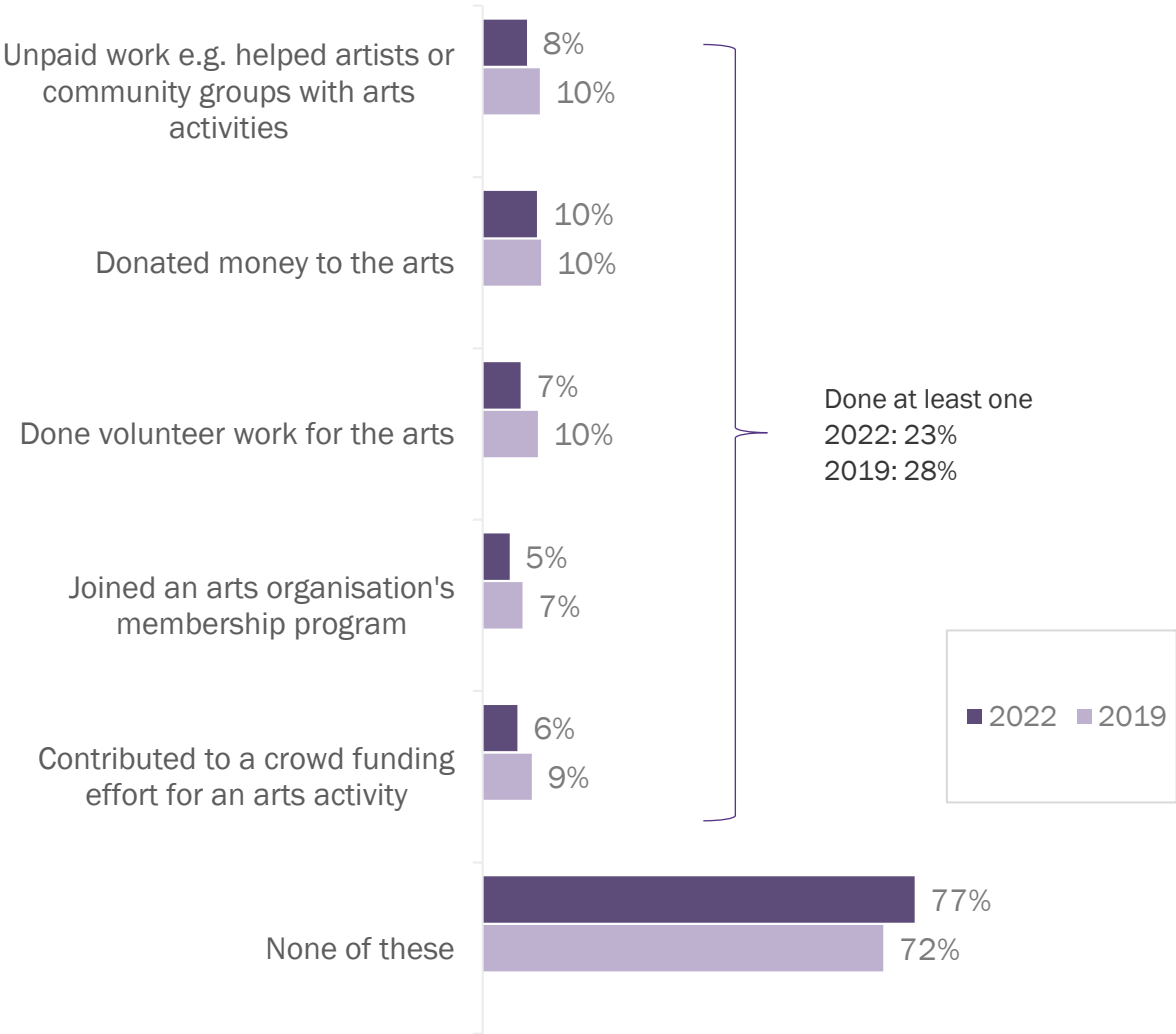
Importance to Victorians and their community	% ranked first		% ranked top 3	
	Melbourne	Regional	Melbourne	Regional
Ensuring free or low-cost events are available	34%	32%	67%	72%
Ensuring children and young people have access to art and creative experiences to support learning and development	21%	24%	61%	67%
Ensuring art and creative experiences are available to support people's health and wellbeing	13%	13%	49%	47%
Investing in the making of art so it can be widely shared and experienced	10%	9%	38%	36%
Funding art in public spaces	9%	10%	32%	32%
Ensuring there is more access to creative activities and experiences online	6%	6%	28%	24%
Supporting art that pushes boundaries and drives innovation	7%	5%	25%	21%

Q51. From the following list, please select the top 3 in order of importance to you and your community. Base: 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

3.2 Giving to the arts

In 2022, 1.20 million Victorians gave back to the arts, or 23% of the population aged 15 years and over. This is a decrease from 28% in 2019. Those living in VIC were consistent with the national average (23%) to give back to the arts.

Figure 15: Proportion who gave time or money to the arts 2019 and 2022



Q52. In the past 12 months, have you personally done any of the following? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

Figure 16: Giving to the arts 2022

Giving to the arts	Australia Total	VIC Total	VIC	
			Melbourne	Regional
AT LEAST ONE ACTIVITY	23%	23%	24%	18%
Donated money to the arts	10%	10%	10%	8%
Unpaid work e.g. helped artists or community groups with arts activities	8%	8%	9%	6%
Done volunteer work for the arts	7%	7%	7%	6%
Contributed to a crowd funding effort for an arts activity	6%	6%	7%	4%
Joined an arts organisation's membership program	5%	5%	6%	3%
None of these	77%	77%	76%	82%

Q52. In the past 12 months, have you personally done any of the following? Base: 2022 VIC data (n= 2,339) // 2022 AUS data (n=9,396) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 17: Giving to the arts 2022 – Melbourne metro breakdown

Giving to the arts	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
AT LEAST ONE ACTIVITY	23%	32%	25%	23%	20%
Donated money to the arts	10%	13%	12%	9%	8%
Unpaid work e.g. helped artists or community groups with arts activities	8%	10%	8%	8%	8%
Done volunteer work for the arts	7%	12%	6%	7%	6%
Contributed to a crowd funding effort for an arts activity	6%	10%	7%	5%	7%
Joined an arts organisation's membership program	5%	6%	6%	6%	3%
None of these	77%	68%	75%	77%	80%

Q52. In the past 12 months, have you personally done any of the following? Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

4 Live attendance at arts events

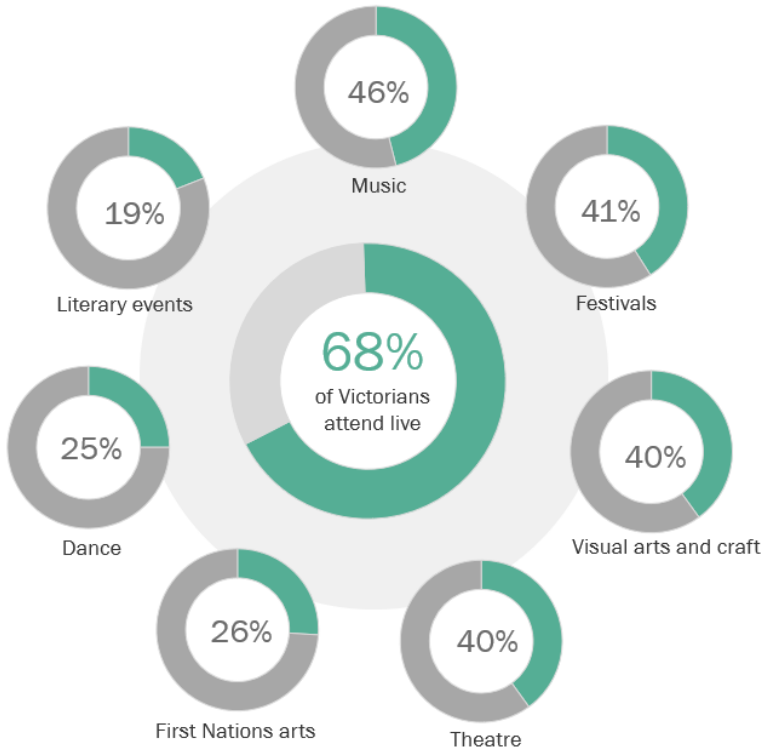
4.1 Live attendance at arts events

4.1.1 Comparing live attendance 2019 to 2022

NAPS 2019 results provided a benchmark of Australians' live attendance before the impacts of COVID-19. Prior to COVID-19, live attendance at arts events was thriving, with more than two in three Australians attending the arts in person in 2019 (68%). For those living in VIC, 68% attended live events in 2019. Whilst no NAPS measures were taken in 2020 or 2021, the COVID-19 Audience Outlook Monitor showed an impact on attendance and a decrease in engagement due in part to the social restrictions and lockdowns imposed during COVID.¹

Current 2022 NAPS data confirms that things are returning to normal and Australians are back attending different types of arts events both live and digitally with overall live attendance at pre-pandemic levels (68%) over the past 12 months. Amongst VIC, attendance levels are at 68%, remaining consistent with 68% in 2019.

Figure 18: Victorians' attendance to live events



[Note –figures are based on custom variables: includes art form attendance, festivals, First Nations arts or festivals, or events from own cultural-based on custom variables.

¹ More information about COVID-19 Audience Outlook Monitor 2022: <https://australiacouncil.gov.au/advocacy-and-research/audience-outlook-monitor/>

Note live attendance figures are derived from several types of events and activities with the total figure representing the percentage of Australians that attended **at least one of the following** in the past 12 months:

- Free or paid events
- Festivals
- Aboriginal and/or Torres Strait Islander arts or cultural activities or festivals,
- Creative, cultural or artistic events or festivals focused on people's own cultural background.

4.1.1 Comparing live attendance across art forms 2019 to 2022

In 2022, 3.63 million Victorians attended creative, cultural and artistic events or festivals, or 68% of the population aged 15 years and over. This includes attendance at mainstream events and festivals, First Nations events and festivals, and cultural events and festivals. Overall attendance has remained unchanged since 2019.

Figure 19: Proportion of Victorians who attended a live event or festival in 2022 compared to 2019



4.2 Live attendance by artform

Survey participants were asked which of the following free or paid events such as exhibitions, performances or shows they attended over the last 12 months:

- music (e.g. attending live music)
- theatre (e.g. traditional, contemporary, musical theatre, circus)

- visual arts and craft (e.g. painting, photography, light art, digital art, street art, crafts, woodwork, textiles)
- dance (e.g. classical, contemporary and competitive dance)
- book or literary events, excluding for work and study (e.g. writers festivals, talks).

Figure 20: Live arts event attendance 2022

Arts attendance	Australia Total	VIC Total	VIC	
			Melbourne	VIC Regional
ATTENDED AT LEAST ONE ART EVENT	62%	64%	68%	52%
Music	39%	38%	40%	34%
Theatre	30%	34%	37%	22%
Visual arts and craft	31%	33%	36%	24%
Dance	13%	11%	13%	6%
Book or literary events	13%	13%	15%	9%
None of these	38%	36%	32%	48%

Q1. Over the last 12 months, have you personally attended any of these kinds of free or paid events (e.g. exhibitions, performances, shows) Base: 2022 VIC data (n=2,339) // 2022 Australia data (n=9396) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 21: Live arts event attendance 2022 – Melbourne breakdown

Arts attendance	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
ATTENDED AT LEAST ONE ART EVENT	64%	78%	69%	66%	60%
Music	38%	51%	40%	40%	30%
Theatre	34%	47%	41%	33%	31%
Visual arts and craft	33%	47%	35%	34%	32%
Dance	11%	20%	13%	13%	8%
Book or literary events	13%	22%	14%	13%	11%
None of these	36%	22%	31%	34%	40%

Q1. Over the last 12 months, have you personally attended any of these kinds of free or paid events (e.g. exhibitions, performances, shows) Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

4.3 Spotlight on live attendance by art form – Live Music

In 2022, 2.04 million Victorians attended live music events, or 38% of the population aged 15 years and over (similar levels to 2019 at 40%).

Profile of VIC respondents attending live music

- Attendance at live music events peaks between the ages of 15-24 years: 56%
- Music events are only slightly more attended by men (39% compared to 37% of women)

- Those with children under 16 years are more likely than those without children under 16 to attend music events (47% compared to 36%)

4.3.1 Types of music events

- Nearly three in ten (29%) of Victorians 15+ attended **contemporary music** such as pop, rock, electronic, dance, hip hop, country, jazz and blues, consistent with 29% from 2019
- One in ten (10%) of Victorians 15+ attended **musical theatre or cabaret**, consistent with 2019 (10%)
- 6% of Victorians aged 15+ attended **classical music** such as **orchestral or chamber music**, just below 2019 (9%)
- 5% of Victorians aged 15+ attended **traditional or folk music**, slightly down from 2019 (7%)
- 6% of Victorians aged 15+ attended **art music** such as new classical, experimental new music or sound art, consistent with 2019 (7%)
- 3% of Victorians aged 15+ attended **opera**, a slight decrease from 2019 (4%).

4.3.2 Places for music events

- 20% of Victorians 15+ attend live music events at **concert halls and theatres**, remaining consistent with 2019 (21%)
- One in six (17%) of Victorians 15+ attend music events at **pubs, clubs or bars**, similar to 2019 (15%)
- A similar number of Victorians (16%) 15+ attend music events at **stadiums or arenas**, consistent with 2019 (15%)
- 15% of Victorians 15+ attend music events at **outdoor public spaces**, remaining consistent with 2019 (14%)
- 5% of Victorians 15+ attend music events in **education settings** such as schools, universities or colleges, slightly decreasing from 2019 (7%)
- 3% of Victorians 15+ attend music events at a **place of worship**, staying consistent with 2019 (4%).

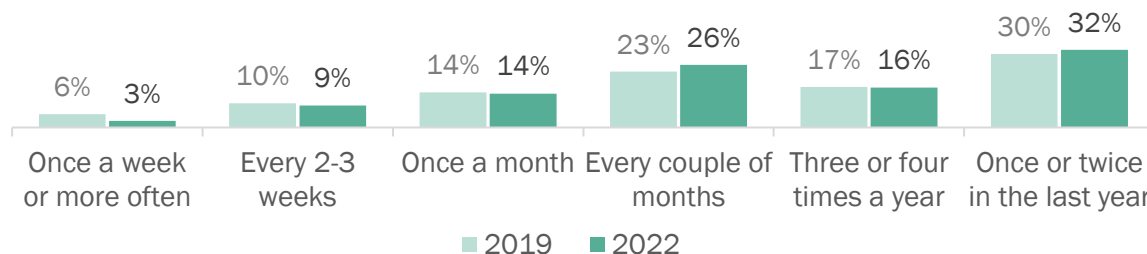
4.3.3 Frequency of attendance at live music events

The frequency of music event attendance has remained steady since 2019. There has been an increase in less frequent attendance (e.g. every couple of months). This would likely be experienced as a drop in overall audience numbers for many sector providers.

- More Victorians are attending every couple of months (26% in 2022, 23% in 2019)

On average, those who attended music events went to 8.2 events over the past 12 months, a decrease from an average of 10.5 events in 2019.

Figure 22: Victorians' live music event attendance frequency



Q2_5. And in the past 12 months, how often did you personally attend these kinds of events (e.g., exhibitions, performances, shows)? - Music Base: Those who attended live music events (VIC 2022: n= 927 // 2019: VIC n=914)

4.4 Spotlight on live attendance by art form – Live Theatre

In 2022, 1.80 million (1,801) Victorians attended theatre events, or 34% of the population aged 15 years and over (an increase from 30% in 2019).

Profile of respondents attending theatre

- Attendance at theatre events is highest amongst Victorians between the ages of 15-49: 39%
- CALD Victorians are more likely to attend a theatre event in 2022: 41% compared to 33% of non-CALD Victorians
- Attendance of theatre events is highest amongst couples and parents (37% and 39% respectively, cf. 30% for people who are single)
- Victorian women are attending more live theatre events in 2022 when compared to 2019 (37% cf. 31% in 2019).

4.4.1 Types of theatre events

- 22% of Victorians 15+ attend **musical theatre or cabaret**, a slight decrease from 2019 (19%)
- A sixth (16%) of Victorians 15+ attend **Traditional or Contemporary theatre**, consistent with 2019 (16%)
- 6% of Victorians 15+ attend **the circus**, consistent with 2019 (7%)
- An equivalent amount (6%) of Victorians 15+ attend **children's theatre**, consistent with 2019 (7%)

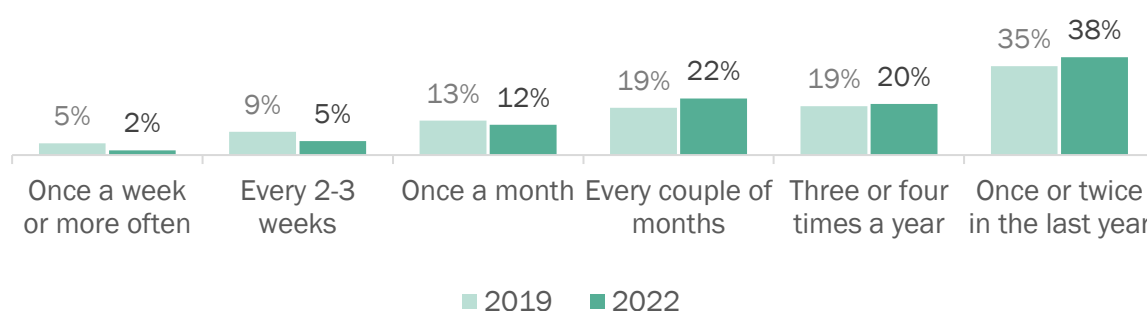
4.4.2 Frequency of attendance at live theatre events

The frequency of attending theatre events has changed since 2019.

- Fortnightly or more frequent attendance to theatre events in 2022 has decreased by 4 percentage points (5% in 2022, 9% in 2019), with more Victorians attending every couple of months (22% in 2022, 19% in 2019).

The number of events attended has decreased from 2019 results, and on average, those who attend theatre events went to 6.5 theatre performances in 2022 compared to 9.4 in 2019.

Figure 23: Victorians' live theatre event attendance frequency



Q2_2. And in the past 12 months, how often did you personally attend these kinds of events (e.g. exhibitions, performances, shows)? - Theatre Base: Those who attended live theatre events (VIC 2022: n= 811 // 2019: n= 687)

4.5 Spotlight on live attendance by art form – Live Visual Arts and Crafts

In 2022, 1.76 million Victorians attended visual arts and craft events, or 33% of the population aged 15 years and over (up from 28% in 2019).

Profile of respondents attending visual arts and craft

- Two in five Victorians (41%) aged between 25-49 attended Visual arts and craft events (cf. 34% for 15-24 year olds and 25% for Victorians over 50)
- Women are more likely than men to attend live visual arts and craft events (36% compared to 30% of men)
- More than two in five (43%) Victorians that have completed higher education have attended live visual arts and craft events. (cf. 26% of Victorians who have not attended university)

4.5.1 Types of visual arts and crafts events

- More than one in five (23%) Victorians 15+ attend **painting, drawing, printmaking or street art events**, a slight increase from 2019 (20%).
- One in seven (14%) of Victorians 15+ attend **sculpture, installation, or light projections events**, a slight increase from 2019 (11%)

- 13% of Victorians 15+ attend **photography events**, consistent with 2019 (14%)
- 13% of Victorians 15+ attended **craft events** like ceramics, glass art, jewellery, textiles or woodcraft, consistent with 2019 levels (12%)
- One in ten (11%) Victorians 15+ attend **digital or video art events**, an increase from 2019 (9%)

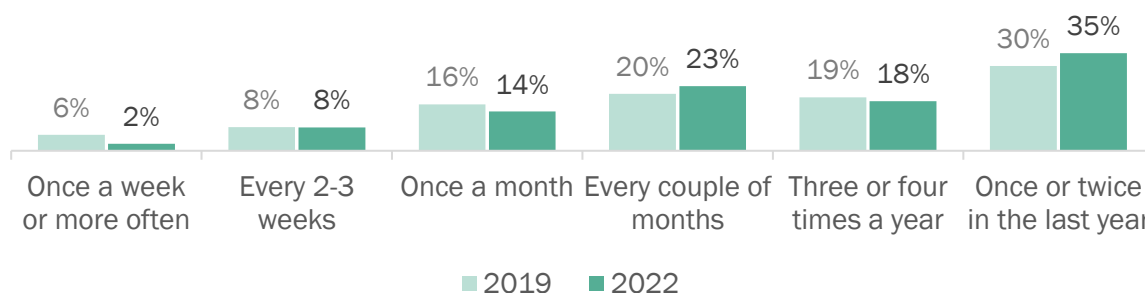
4.5.2 Frequency of attendance at live arts and crafts events

As with other art forms, the frequency of attending visual arts and craft events has changed slightly since 2019, with less Australians attending monthly and more attending less often.

- Monthly attendance at visual arts and crafts events dropped by two percentage points (14% in 2022, 16% in 2019), and more Victorians are attending every couple of months (23% in 2022, 20% in 2019).

On average, those who attended visual arts and craft events attended 7.8 events in 2022, decreasing slightly from 2019 (10.5)

Figure 24: Victorians' visual arts and crafts event attendance frequency



Q2_1. And in the past 12 months, how often did you personally attend these kinds of events (e.g. exhibitions, performances, shows)? – Visual arts and Crafts Base: Those who attended visual arts and craft events (VIC 2022: n=793 // 2019: n=646)

4.6 Spotlight on live attendance by art form – Dance

In 2022, 603 thousand (603) or 11% of VIC Australians attended dance events (a slight decrease from 14% in 2019).

Profile of respondents attending dance performances

- An equivalent number of men and women from Victoria attended dance events in 2022 (11% each)
- One in five (20%) CALD Victorians aged 15+ attended dance events in 2022 (cf. 9% of non-CALD Victorians)

4.6.1 Types of Dance events

- 5% of VIC Australians aged 15+ attended **contemporary dance events**, consistent with 2019 (6%)
- **Street dance or hip-hop events** were attended by 4% of Victorians 15+, slightly down from 2019 (6%)
- A similar proportion (4%) of Victorians attend **ballet events**, remaining consistent with 2019 (5%)
- 4% of Victorians 15+ attended **social or competitive dance events** such as ballroom, swing or tango, consistent with 2019 (6%)
- 3% of Victorians 15+ attended **classical, traditional or folk dance events**, equal to 2019 levels (4%).

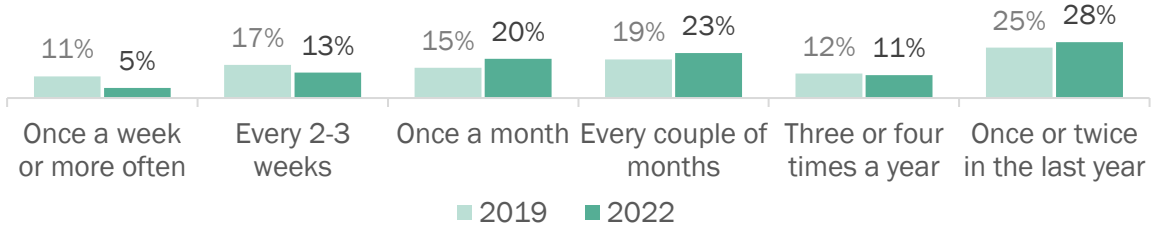
4.6.2 Frequency of attendance at live dance events

The frequency of attending dance events has changed since 2019, with fewer Victorians attending weekly or every 2-3 weeks.

- Weekly attendance at dance events in 2022 **decreased** by six percentage points (5% in 2022, 11% in 2019), and more Victorians are attending every couple of months (23% in 2022 cf. 19% in 2019).

Overall, there was a slight decrease in attendances at dance performances. Australians who attend dance performances, on average attended 11.2 dance events in 2022 compared with 15.9 dance events in 2019.

Figure 25: Victorians’ live dance event attendance frequency



Q2_3. And in the past 12 months, how often did you personally attend these kinds of events (e.g. exhibitions, performances, shows)? - Dance Base: Those who attended live dance events (VIC 2022: n= 283 // 2019: n= 328)

4.7 Spotlight on live attendance by art form – Book or literary events

In 2022, 706 thousand or 13% of Victorians aged 15 years and over attended book or literary events (down from 15% in 2019).

Profile of respondents attending book or literary events

- CALD respondents are twice as likely as non-CALD respondents to attend book or literary events (21% compared to 11% of non-CALD respondents)
- One in five University graduates (20%) attended Book or literary events, compared to 9% for Victorians that did not complete higher education
- Almost one in five (17%) Victorian parents attended Book or literary events in 2022

4.7.1 Types of book or literary events

Australians connect with a range of literature and with each other with the most popular being writer talks or book launches (6%), book clubs (6%) and readings (6%), followed by Writers festivals (4%).

- 6% of Victorians aged 15+ attend **writer talks or book launches**, unchanged from 2019 (7%)
- A similar proportion (6%) of Victorians aged 15+ attend **book club events**, consistent with 2019 (7%)
- 6% of Victorians 15+ attend **reading events like poetry and storytelling**, consistent with 2019 (7%)
- 4% of Australians 15+ in VIC attend **writers' festivals**, a slight decrease from 2019 (6%)

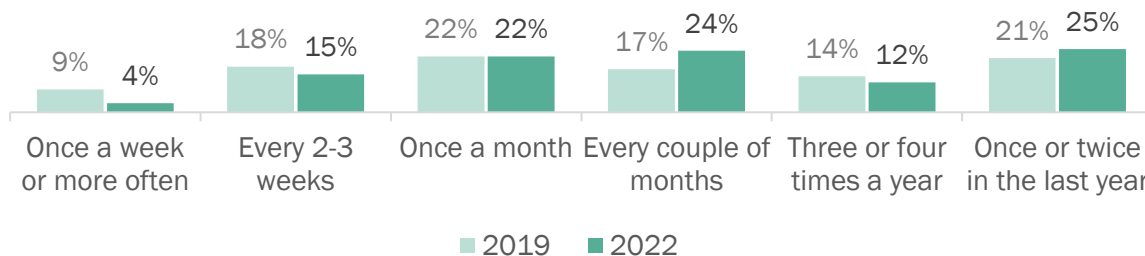
4.7.2 Frequency of attendance at book or literary events

The frequency of book or literary event attendance has changed since 2019 and, as with other art forms. There has been an overall decrease with frequent attendance.

- Amongst the Victorians that attend book or literary events, attendance on a weekly or more frequent basis in 2022 dropped by five percentage points (4% in 2022 cf. 9% in 2019), with more Victorians attending these events every couple of months (24% in 2022 cf. 17% in 2019).

On average, those who attend book or literary events went to 10.7 events in 2022, a decrease from an average of 15.2 book or literary events in 2019.

Figure 26: Victorians' book or literary event attendance frequency

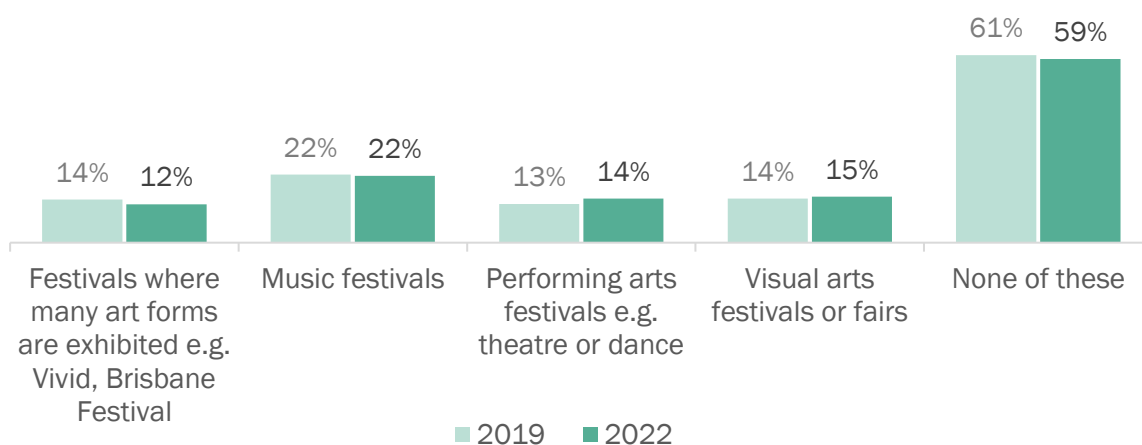


Q2_4. And in the past 12 months, how often did you personally attend these kinds of events (e.g. exhibitions, performances, shows)? – Book or literary events Base: Those who attended book or literary events (VIC 2022: n= 322 // 2019: n= 346)

4.8 Spotlight on live attendance – Festivals

Festivals are a part of life for more than two in five Australians (44%) and have continued to grow in popularity post COVID-19 (up by 2 percentage points since 2019). Amongst those living in VIC, there is a similar pattern (41%, up by 2 percentage points since 2019 (39%)).

Figure 27: Festivals attendance 2019 and 2022



Q10. Have you attended any of the following festivals (either free or paid for) in the past 12 months? Base: 2022 VIC data (n=2,339) // 2019 VIC data (n=2,281)

Figure 28: Festival attendance 2022

Arts attendance	Australia Total	VIC Total	VIC	
			Melbourne	Regional
ATTENDED AT LEAST ONE FESTIVAL	44%	41%	44%	32%
Music festivals	22%	22%	23%	19%
Visual arts festivals or fairs	15%	15%	17%	9%
Festivals where many art forms are exhibited e.g. Vivid, Brisbane Festival	19%	12%	14%	8%
Performing arts festivals e.g. theatre or dance	14%	14%	16%	9%
None of these	56%	59%	56%	68%

Q10. Have you attended any of the following festivals (either free or paid for) in the past 12 months? Base: 2022 VIC data (n= 2,339) // Australia data (n=9,396) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 29: Festival attendance 2022 – VIC Melbourne breakdown

Arts attendance	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
ATTENDED AT LEAST ONE FESTIVAL	41%	54%	43%	43%	39%
Music festivals	22%	22%	23%	23%	22%
Visual arts festivals or fairs	15%	23%	16%	17%	14%
Festivals where many art forms are exhibited e.g. Vivid, Brisbane Festival	12%	25%	13%	12%	10%
Performing arts festivals e.g. theatre or dance	14%	19%	15%	15%	16%
None of these	59%	46%	57%	57%	61%

Q10. Have you attended any of the following festivals (either free or paid for) in the past 12 months? Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

4.9 Perceived change in live attendance

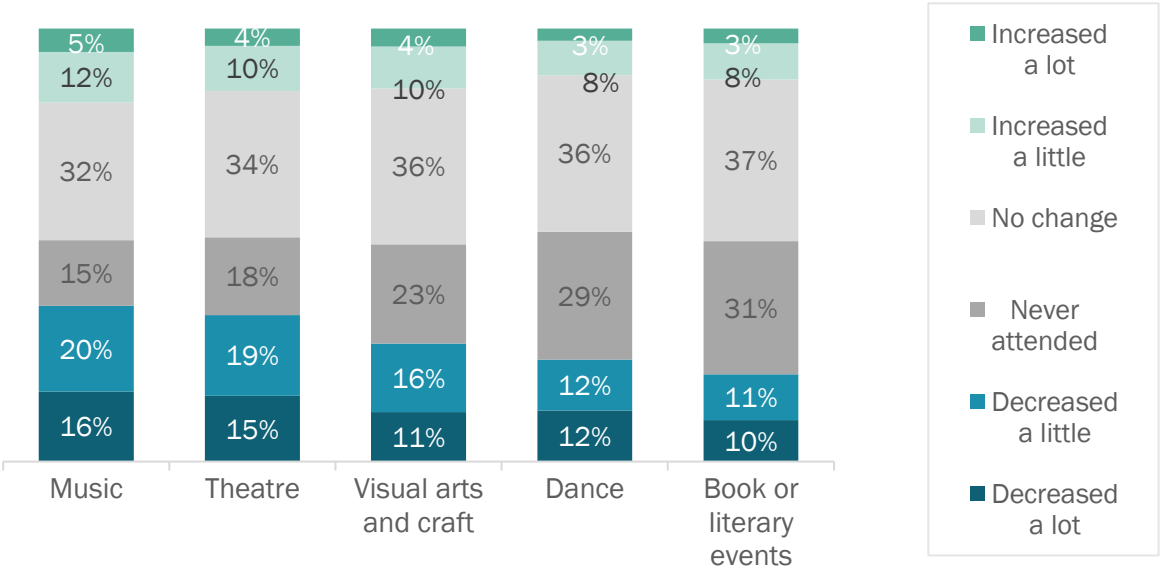
Whilst the previous sections outlined the key benchmark measures from NAPS, this section is new in 2022 and outlines respondents' perception of their change in attendance. It is clear from NAPS 2022 benchmark figures that there has been an overall decrease in attendance at live events across art forms, particularly with regards to the frequency of attending events. However, to better understand changes in attendance, survey respondents are asked to record whether they perceived their attendance over the past 12 months to have increased or decreased compared with before the COVID-19 pandemic.

4.9.1 Live attendance by art form – pre and post COVID-19

When respondents compare their attendance levels (over the past 12 months) to before the COVID-19 pandemic, there was an overall drop in attendance at live performances across all art forms:

- Attendance at live music events decreased for 36% of Victorians
- Attendance of theatre events decreased for 34% of Victorians
- Attendance at visual arts and craft events decreased for 27% of Victorians
- Attendance at dance events decreased for 24% of Victorians
- Attendance at book or literary events decreased for 20% of Victorians

Figure 30: Perceived change in live attendance – by artform



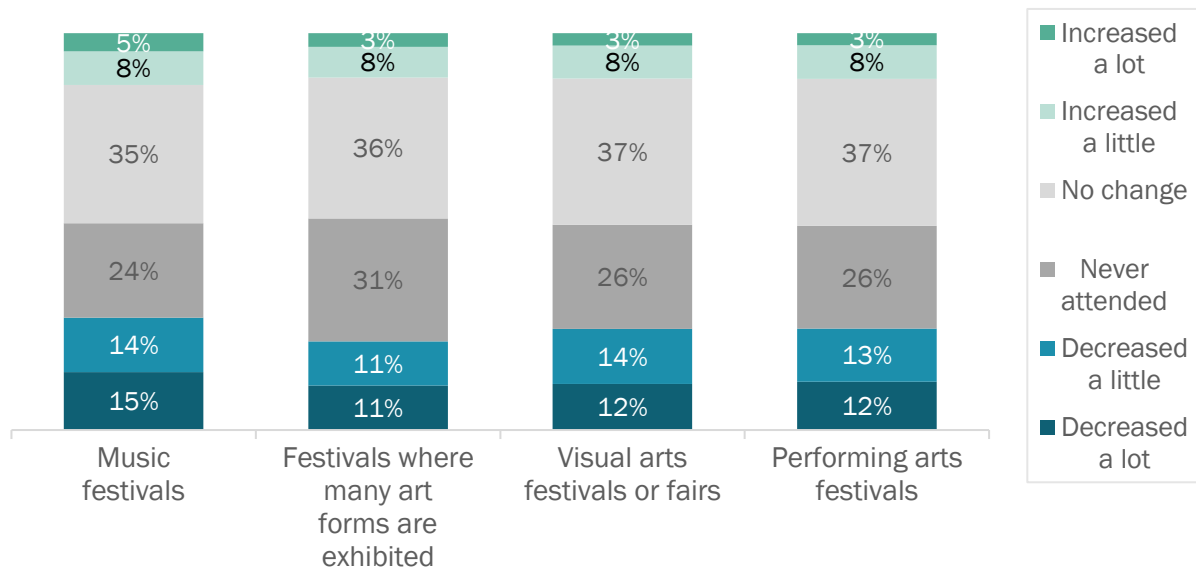
Q9. Thinking about your attendance over the past 12 months. How has your attendance changed compared to before the COVID-19 pandemic? Base: 2022 VIC data (n= 2,339)

4.9.2 Festival Attendance – pre and post COVID-19

A similar pattern from the live event attendance is seen for live festival attendance, where there has been a significant perceived decrease in Australians’ festivals attendance:

- Music festivals decreased by 28% for VIC
- Performing arts festivals decreased by 26% for VIC
- Festivals where many art forms are exhibited decreased by 22% for VIC
- Visual arts festivals or fairs decreased by 26% for VIC

Figure 31: Perceived change in festival attendance

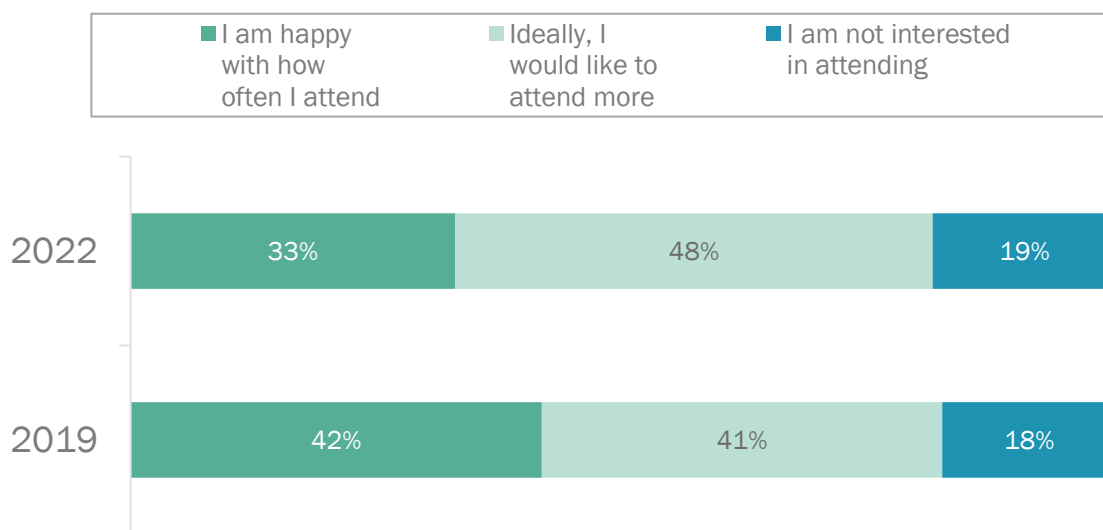


Q11. Thinking about your attendance over the past 12 months. How has your attendance changed compared to before the COVID-19 pandemic? Base: 2022 VIC data (n= 2,339)

4.10 Desire to attend more live events

Almost half of Victorians would like to attend more creative, cultural and artistic events (48%, up from 41% in 2019). A smaller proportion (33%) are happy with their current level of attendance, and almost one in five (19%) are not interested in attending.

Figure 32: VIC's feelings about current levels of arts attendance 2022 and 2019



Q20. Regardless of whether you have or haven't attended these kinds of events/festivals in the past 12 months, which of these statements best applies to you? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

Those living in VIC are about as likely as other Australians to want to attend more creative, cultural and artistic events.

Figure 33: 2022 feelings about current levels of arts attendance

Current level feelings	Australia Total	VIC Total	VIC	
			Melbourne	Regional VIC
I am happy with how often I attend	32%	33%	33%	32%
Ideally, I would like to attend more	49%	48%	49%	45%
I am not interested in attending	19%	19%	17%	22%

Q20. Regardless of whether you have or haven't attended these kinds of events/festivals in the past 12 months, which of these statements best applies to you? Base: 2022 Australian data (n= 9,396) // 2022 VIC data (n= 2,339) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 34: 2022 feelings about current levels of arts attendance – VIC Melbourne breakdown

Current level feelings	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
I am happy with how often I attend	33%	35%	35%	33%	30%
Ideally, I would like to attend more	48%	50%	49%	50%	49%
I am not interested in attending	19%	15%	16%	17%	22%

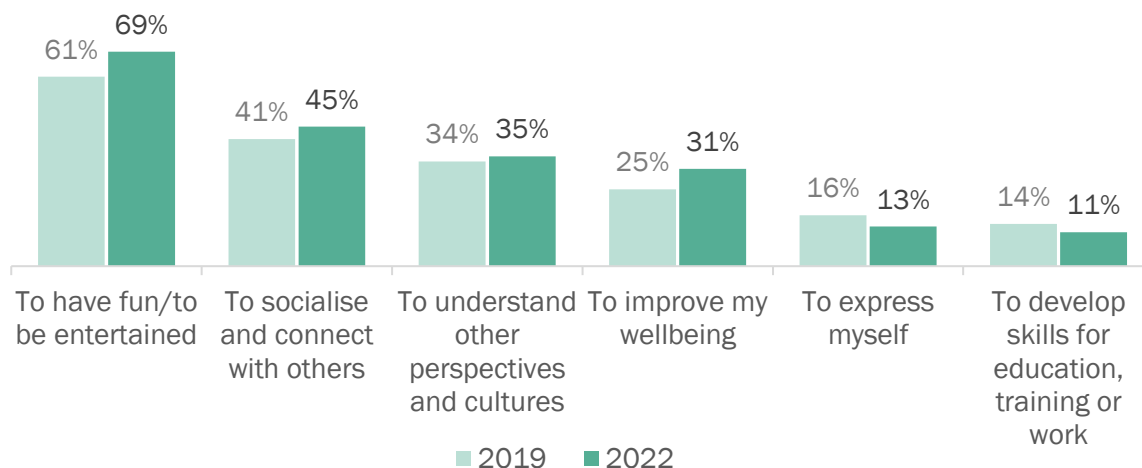
Q20. Regardless of whether you have or haven't attended these kinds of events/festivals in the past 12 months, which of these statements best applies to you? Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

4.11 Motivations to attend arts and creative activities and events

In 2022, 1.62 million Victorians attended creative, cultural and artistic events or festivals to have fun and to be entertained, or 69% of the population aged 15 years and over. Over two in five (45%) of Victorians attend to socialise and connect with others.

Over a third attended to understand other perspectives and cultures (35%), and almost a third attended to improve their wellbeing (31%). Less common reasons include to express oneself (13%) and to develop skills for education, training or work (11%).

Figure 35: VIC's Motivators to attend creative, cultural and artistic events 2022 and 2019



Q21. There are many reasons why people may attend creative, cultural and artistic events/festivals in person. Which of the following reasons, if any, apply to you? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

Figure 36: Australian and VIC's Motivators to attend creative, cultural and artistic events 2022

Motivators	Australia Total	VIC Total	VIC	
			Melbourne	Regional VIC
AT LEAST ONE MOTIVATION	87%	88%	89%	83%
To have fun/to be entertained	69%	69%	69%	69%
To socialise and connect with others	46%	45%	46%	44%
To understand other perspectives and cultures	36%	35%	37%	32%
To improve my wellbeing	32%	31%	32%	28%
To express myself	14%	13%	14%	10%
To develop skills for education, training or work	12%	11%	12%	9%
None of these	13%	12%	11%	17%

Q21. There are many reasons why people may attend creative, cultural and artistic events/festivals in person. Which of the following reasons, if any, apply to you? Base: 2022 Australian data (n= 9,396) // 2022 VIC data (n= 2,339) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 37: Australian and VIC's Motivators to attend creative, cultural and artistic events 2022

Motivators	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
AT LEAST ONE MOTIVATION	88%	92%	90%	89%	87%
To have fun/to be entertained	69%	71%	70%	69%	67%
To socialise and connect with others	45%	48%	47%	44%	43%
To understand other perspectives and cultures	35%	39%	36%	36%	36%
To improve my wellbeing	31%	37%	34%	30%	30%
To express myself	13%	14%	12%	16%	14%
To develop skills for education, training or work	11%	13%	11%	11%	13%
None of these	12%	8%	10%	11%	13%

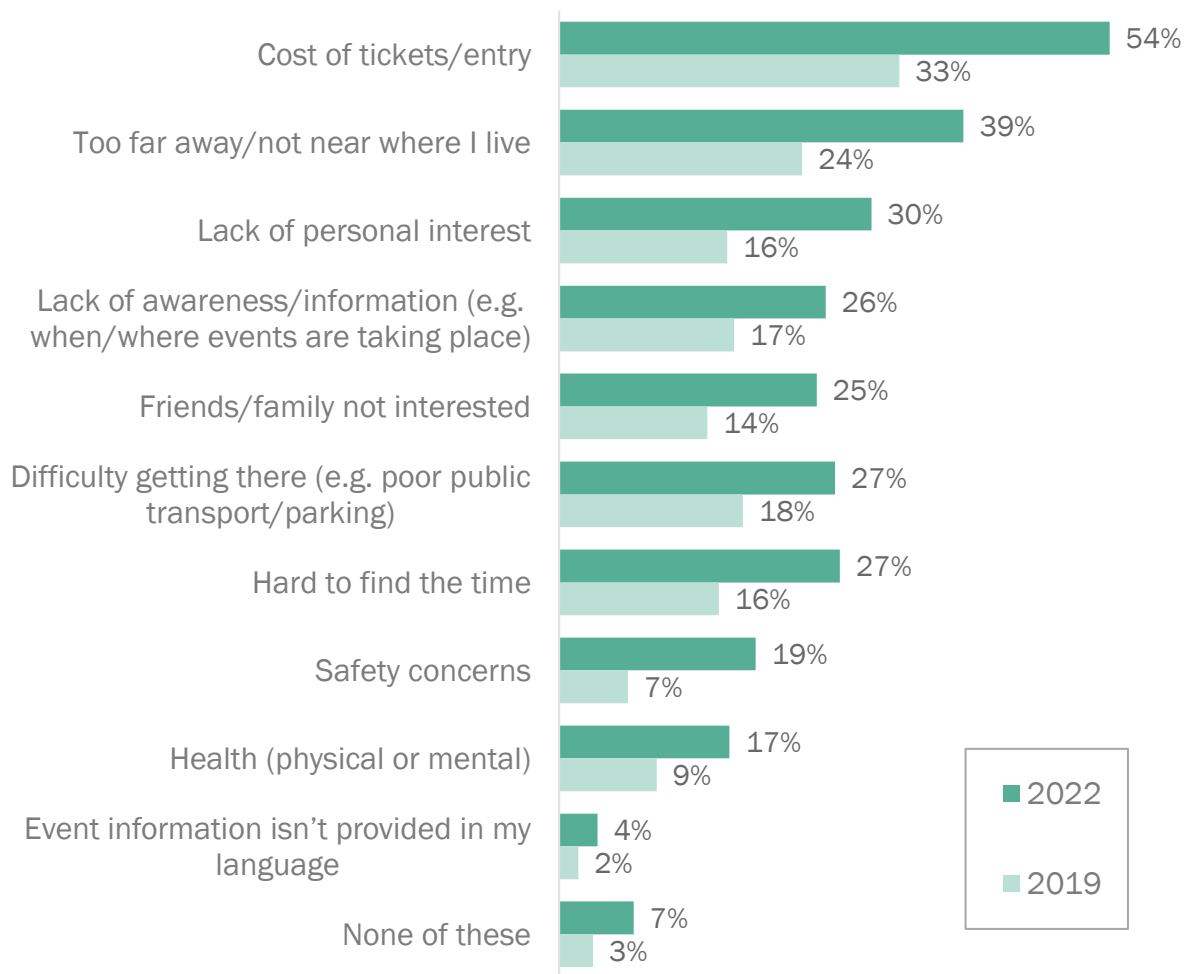
Q21. There are many reasons why people may attend creative, cultural and artistic events/festivals in person. Which of the following reasons, if any, apply to you? Base: 2022 VIC data (n=2,339) // Melbourne - inner metro (n=261) // Melbourne - middle metro (n=703) // Melbourne - outer metro (n=460) // Melbourne - growth metro (n=414)

4.12 Barriers to attending arts and creative activities and events

The main two barriers to arts attendance amongst Victorians are the cost of tickets/entry and the distance.

In reading the results below, it should be noted that in the 2019 National Arts Participation Survey, barriers were only asked of those people who either wanted to attend more arts events than they currently did, or of those who claimed they had no interest in attending. However, in the 2022 survey, all survey respondents were asked about their barriers to attending arts and cultural events including those that were happy with how often they attended. This was to ensure that if this latter group also perceived barriers these would be captured.

Figure 38: Barriers to attending live events 2022 and 2019



Q22. There are many reasons why people may not attend creative, cultural and artistic events/festivals, or may not go as often as they would like to. Which of the following reasons, if any, apply to you? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

Figure 39: Barriers to attending live events 2022

Barriers	Australia Total	VIC Total	VIC	
			Melbourne	Regional
AT LEAST ONE BARRIER	93%	93%	93%	92%
Cost of tickets/entry	55%	54%	54%	53%
Too far away/not near where I live	40%	39%	35%	51%
Lack of awareness/information (e.g. when/where events are taking place)	27%	26%	26%	25%
Lack of personal interest	31%	30%	31%	29%
Hard to find the time	26%	27%	28%	25%
Difficulty getting there (e.g. poor public transport/parking)	28%	27%	27%	26%
Friends/family not interested	25%	25%	26%	21%
Health (physical or mental)	16%	17%	15%	21%
Safety concerns	20%	19%	19%	19%
Event information isn't provided in my language	4%	4%	4%	2%
None of these	7%	7%	7%	8%

Q22. There are many reasons why people may not attend creative, cultural and artistic events/festivals, or may not go as often as they would like to. Which of the following reasons, if any, apply to you? Base: 2022 Australian data (n= 9,396) // 2022 VIC data (n= 2,339) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 40: Barriers to attending live events 2022

Barriers	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
AT LEAST ONE BARRIER	93%	93%	92%	93%	93%
Cost of tickets/entry	54%	55%	51%	54%	58%
Too far away/not near where I live	39%	27%	30%	43%	42%
Lack of awareness/information (e.g. when/where events are taking place)	26%	25%	27%	28%	24%
Lack of personal interest	30%	28%	31%	30%	34%
Hard to find the time	27%	25%	29%	30%	27%
Difficulty getting there (e.g. poor public transport/parking)	27%	22%	26%	29%	30%
Friends/family not interested	25%	22%	26%	28%	27%
Health (physical or mental)	17%	12%	13%	16%	20%
Safety concerns	19%	18%	18%	20%	21%
Event information isn't provided in my language	4%	5%	3%	5%	5%
None of these	7%	7%	8%	7%	7%

Q22. There are many reasons why people may not attend creative, cultural and artistic events/festivals, or may not go as often as they would like to. Which of the following reasons, if any, apply to you? Base: 2022 VIC data (n=2,339) // Melbourne - inner metro (n=261) // Melbourne - middle metro (n=703) // Melbourne - outer metro (n=460) // Melbourne - growth metro (n=414)

5 Listening to recorded music and reading

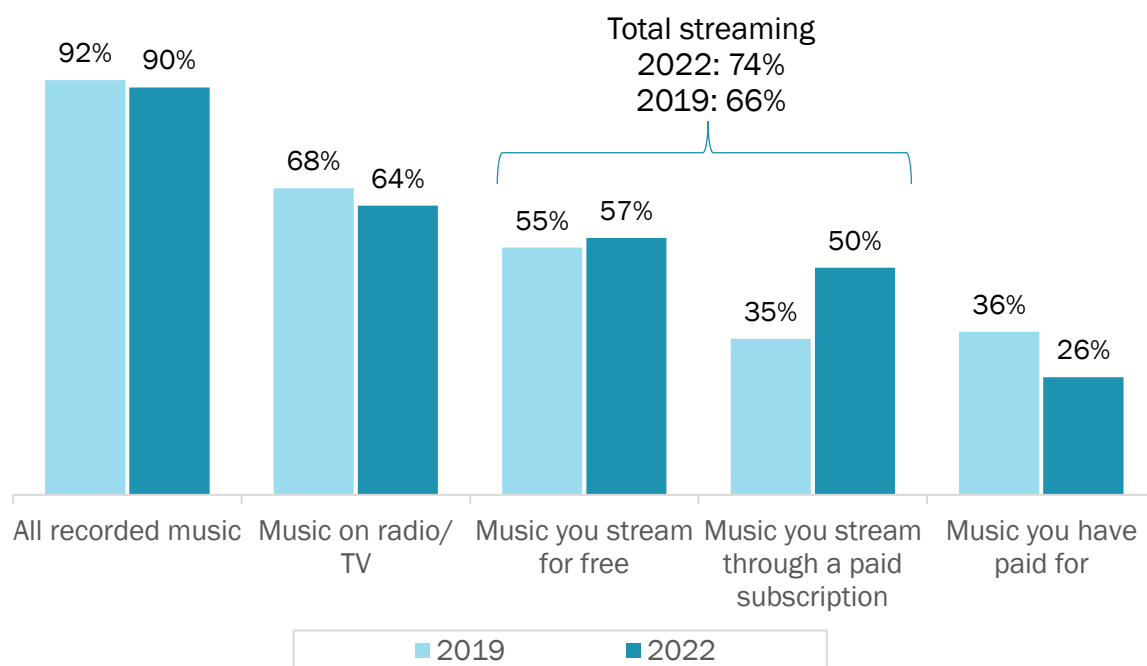
5.1 Listening to recorded music

In 2022, 4.82 million Victorians listened to and/or watched music, representing 90% of the population aged 15 years and over. This remains relatively consistent with 92% in 2019.

Music on radio or television and music streamed for free were the most common formats, with 4.33 million Victorians or 81% of the respondents from VIC using these free formats.

The number of Victorians listening to music through paid subscriptions has risen significantly, from 35% in 2019 to half (50%) in 2022. Almost three in five (57%) listened to music they streamed for free (e.g., YouTube), whilst a quarter (26%) listened to or watched music they paid for (either downloaded or a physical copy, e.g., CDs/vinyl). This has significantly decreased from 36% in 2019.

Figure 41: Victorians' recorded music engagement 2022 and 2019



Q25. Have you listened to and/or watched any of the following formats of recorded music in the past 12 months?
 Base: VIC 2022 15+ (n= 2,339) // VIC 2019 15+ (n= 2,281)

Music on Radio/TV was the most frequently listened to, with 31% or 1.64 million Victorians 15 years and over listening daily. Almost three in ten Victorians (28%) listened to music streamed through a paid subscription daily. Almost one in five Victorians (19%) used free streaming services daily. Only 6% of Victorians listened to music through a downloaded or physical copy on a daily basis.

Figure 42: 2022 recorded music engagement

Recorded music	Australia Total	VIC Total	VIC	
			Melbourne	Regional VIC
At least one recorded music	91%	90%	92%	87%
Music on radio / TV	64%	64%	64%	65%
Music you stream for free	59%	57%	57%	58%
Music you stream through a paid subscription	50%	50%	52%	47%
Music you have paid for	26%	26%	25%	30%

Q25. Have you listened to and/or watched any of the following formats of recorded music in the past 12 months?
 Base: 2022 Australian data (n= 9,396) // 2022 VIC data (n= 2,339) // 2022 Melbourne data (n=1,838) // 2022 Regional VIC data (n=501)

Figure 43: 2022 recorded music engagement – Melbourne Metro breakdown

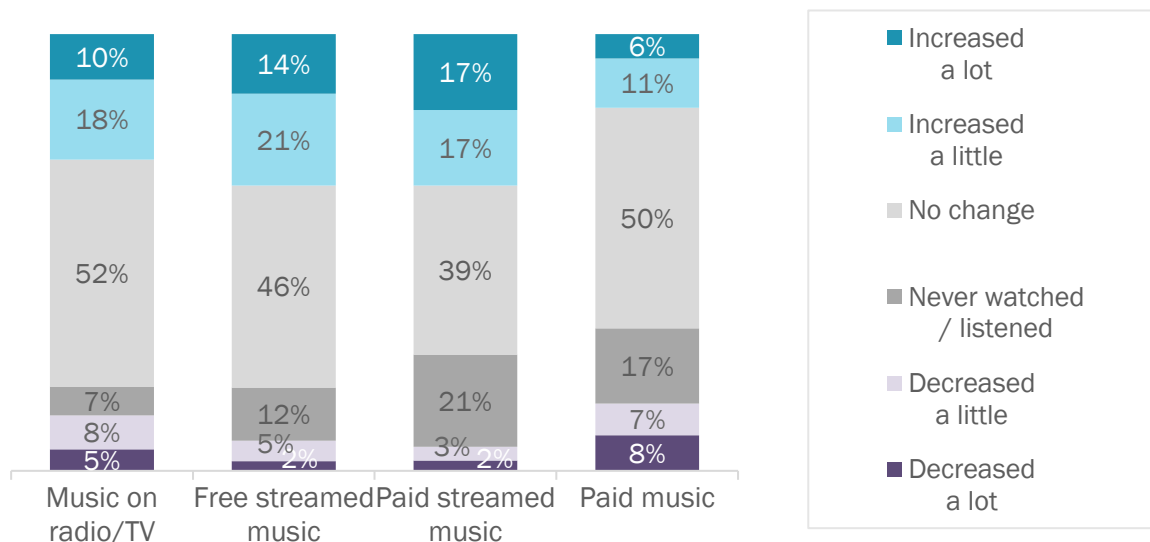
Recorded music	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
At least one recorded music	90%	90%	91%	93%	92%
Music on radio / TV	64%	55%	66%	67%	64%
Music you stream for free	57%	61%	56%	54%	58%
Music you stream through a paid subscription	50%	51%	51%	55%	49%
Music you have paid for	26%	28%	23%	28%	23%

Q25. Have you listened to and/or watched any of the following formats of recorded music in the past 12 months?
 Base: 2022 VIC data (n=2,339) // Melbourne – inner metro (n=261) // Melbourne – middle metro (n=703) // Melbourne – outer metro (n=460) // Melbourne – growth metro (n=414)

5.1.1 Music Engagement in COVID-19

More than a third of Victorians believe their engagement with free streamed music (35%) and paid streamed music (35%) had increased compared to before the COVID-19 pandemic. Listening to music on radio / TV hasn't changed for 52% of Victorians. 50% of Victorians reported no change to the engagement of music that was paid for.

Figure 44: Perceived change in engagement with music



Q27. Thinking about your engagement with music in the past 12 months. How has this changed compared to before the COVID-19 pandemic? Base: 2022 VIC data (n= 2,339)

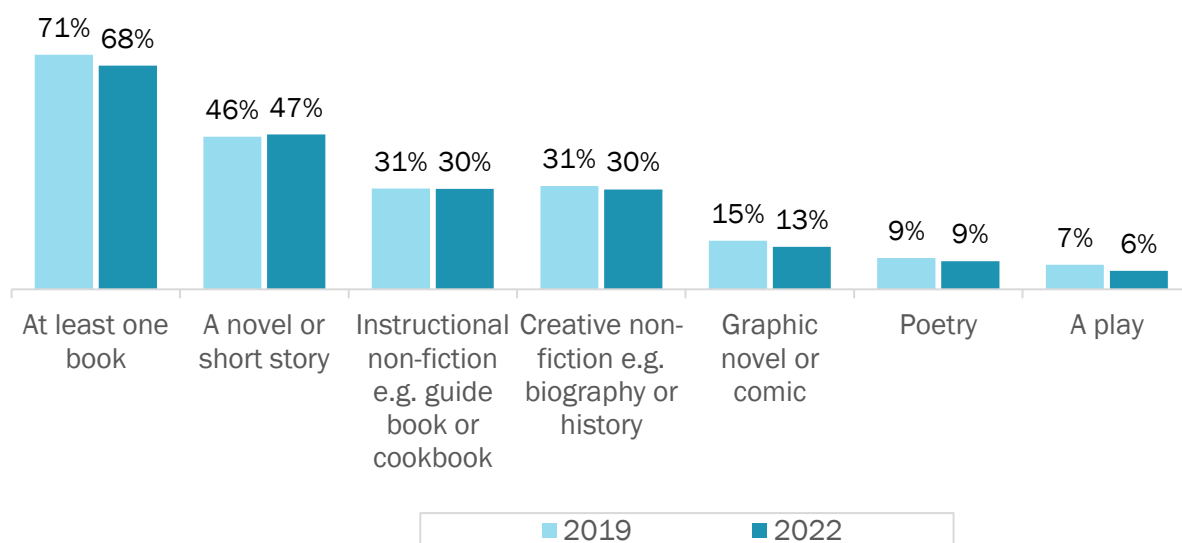
5.2 Reading

In 2022, 3.61 million Victorians read at least one printed book, e-book or listened to an audio book for non-work and study purposes, this is roughly 68% of the population aged 15 years and over. This is a decrease from 71% in 2019.

A novel or short story is the main format read by just under half of VIC (47%), followed by three in ten Victorians reading Instructional and Creative non-fiction (both 30%). More than one in ten Victorians read Graphic novels or comics (13%) and one in ten Victorians read poetry in 2022 (9%). Plays were only read by 6% of Victorians.

Print books are still by far the most popular format, read by 65% of the VIC population aged 15 years and over in the last year. One in ten (11%) Victorians read a print book at least once a week, with 11% reading in this format daily. In the past 12 months, two in five Victorians read an E-book (41%) and a third (34%) listened to an audio book, remaining fairly consistent with 2019 (42% and 32% respectively).

Figure 45: Victorians' engagement with reading 2022 and 2019



Q28. Excluding for work or study, which of the following did you read in the past 12 months? Base: 2022 VIC data (n= 2,339)

Figure 46: 2022 reading engagement

Reading books	Australia Total	VIC Total	VIC	
			Melbourne	Regional VIC
At least one book	69%	68%	69%	66%
A novel or short story	46%	47%	47%	46%
Instructional non-fiction	30%	30%	30%	32%
Creative non-fiction	30%	30%	30%	31%
Graphic novel or comic	14%	13%	13%	11%
Poetry	8%	9%	9%	6%
A play	6%	6%	7%	3%

Q28. Excluding for work or study, which of the following did you read in the past 12 months? Base: 2022 Australian data (n= 9,396) // 2022 WA data (n= 2,339) // 2022 Melbourne data (n= 1,838) // 2022 Regional VIC data (n= 501)

Figure 47: 2022 reading engagement – Melbourne Metro breakdown

Reading books	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
At least one book	68%	72%	69%	68%	67%
A novel or short story	47%	51%	48%	44%	46%
Instructional non-fiction	30%	31%	31%	28%	30%
Creative non-fiction	30%	31%	30%	30%	30%
Graphic novel or comic	13%	12%	13%	15%	15%
Poetry	9%	14%	9%	8%	8%
A play	6%	8%	8%	5%	5%

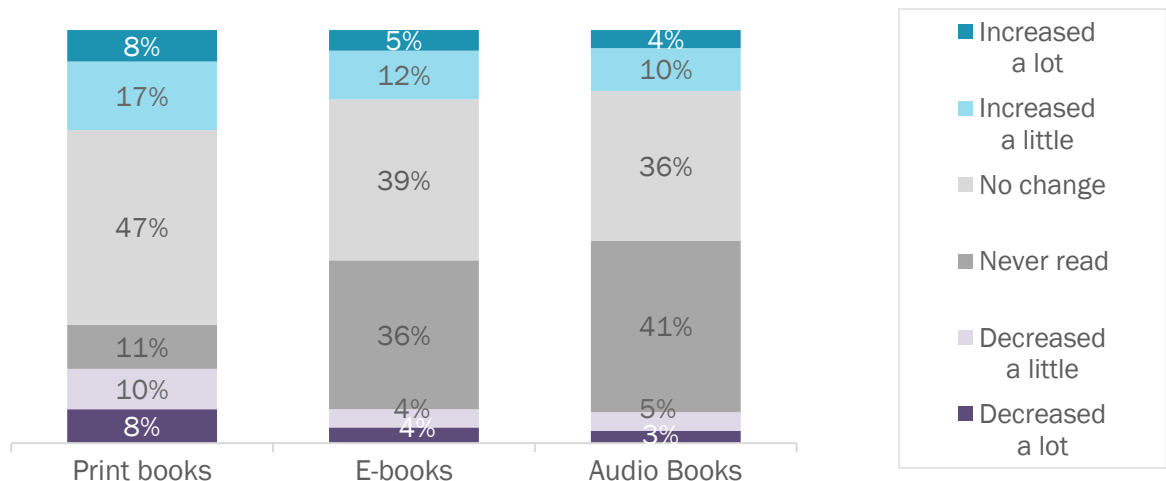
Q28. Excluding for work or study, which of the following did you read in the past 12 months? Base: 2022 VIC data (n= 2,339) // Melbourne – inner metro (n= 261) // Melbourne – middle metro (n= 703) // Melbourne – outer metro (n= 460) // Melbourne – growth metro (n= 414)

5.2.1 Reading and COVID-19

When comparing 2022 figures to 2019, Australians’ engagement with books is quite similar. In the 2022 wave of the NAPS, Australians are asked how they perceived their change in engagement with books compared to before the pandemic. Post COVID, Victorians have seen a general increase in their engagement with books.

While nearly half (47%) of Victorians found their engagement with print books hadn’t changed compared to before the COVID-19 pandemic, a quarter (24%) increased their engagement, and 18% had decreased.

Figure 48: Perceived change in engagement with books



Q30. Thinking about your engagement with books in the past 12 months. How has this changed compared to before the COVID-19 pandemic? Base: 2022 VIC data (n= 2,339)

6 Creative participation in the arts

6.1 Creative participation

Creative participation can take many forms, from artistic photography to playing an instrument, singing in a community choir or taking a community arts class, to more professional forms of arts creation. The creative participation figures are derived from several variables where Australians created or participated in at least one of the following over the past 12 months:

- Created visual arts and craft, theatre, dance, creative writing or music
- Created visual arts and craft, theatre, dance, creative writing or music to engage with their own cultural background, language group or community
- Have been involved in activities in a community setting (e.g. community choir or community theatre)
- Have been involved in a project that could be described as Community Arts and Cultural Development.

In 2022, 2.28 million Victorians created, produced or collaborated in the making of art, or 43% of the population aged 15 years and over. This includes activities participated in alone or with others, creating things for oneself and community collaboration. Overall creation has remained unchanged with 44% in 2019.

Figure 49: VIC’s creative participation

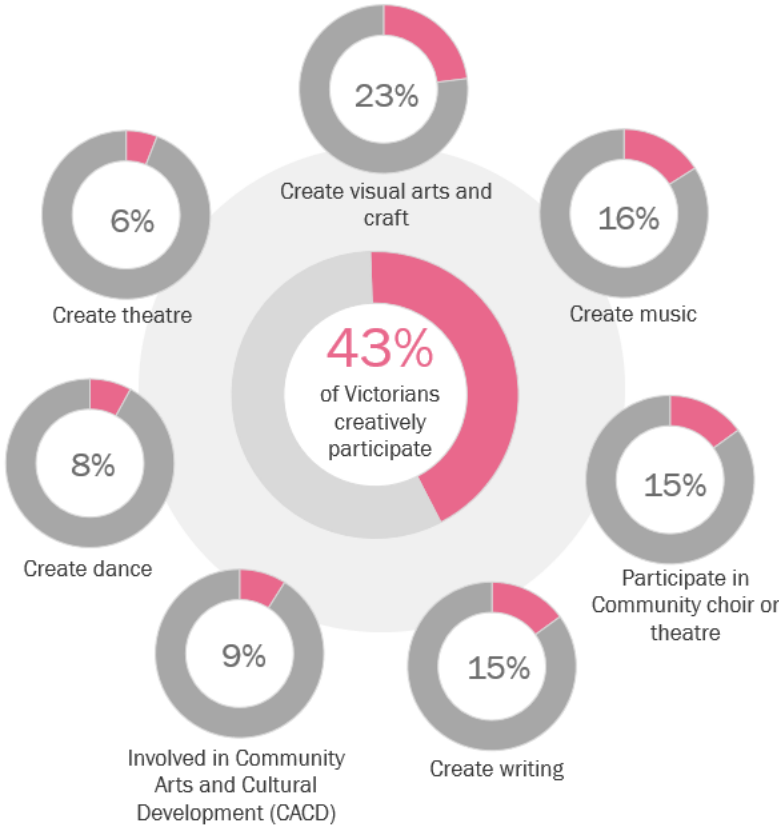


Figure 50: Expressions of Creativity 2019 and 2022



One in four Victorians create **visual arts and craft**, including from their own cultural background (23%, consistent with 24% in 2019)



One in six Victorians create **music**, including from their own cultural background (16%, down from 19% in 2019)



One in six Victorians participate in **community choir or community theatre** (15%, unchanged from 15% in 2019)



One in six Victorians produce **creative writing**, including from their own cultural background (15%, consistent with 16% in 2019)



One in ten Victorians are involved in **Community Arts and Cultural Development** (9%, down from 13% in 2019)



One in ten Victorians creatively participate in **dance**, including from their own cultural background (8%, down from 11% in 2019)



6% of Victorians creatively participate in **theatre**, including from their own cultural background (down from 2019 at 9%).

6.2 Expressions of creativity

Participants were asked which of the following they created over the last 12 months:

- visual arts and craft (e.g. painting, photography, light art, digital art, street art, crafts, woodwork, textiles)
- music (e.g. playing an instrument, singing, mixing, composing or writing music)
- creative writing (e.g. a book, blog post, poetry or other literature)
- dance (e.g. classical, contemporary and organised social dance)
- theatre (e.g. acting, circus, or being part of a production).

Figure 51: Art form creation 2022

Creation	Australia Total	VIC Total	VIC	
			Melbourne	Regional VIC
CREATED AT LEAST ONE ART FORM	38%	38%	38%	38%
Visual arts and craft	22%	21%	21%	23%
Music	14%	14%	13%	15%
Creative writing	12%	13%	13%	12%
Dance	6%	6%	6%	4%
Theatre	5%	4%	5%	2%
None of these	62%	62%	62%	62%

Q35. Over the last 12 months, have you created any of the following? Base: 2022 VIC data (n= 2,339) // 2022 Australia data (n= 9396) // 2022 Melbourne data (n= 1,838) // 2022 Regional VIC data (n= 501)

Figure 52: Art form creation 2022- Melbourne Metro breakdown

Creation	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
CREATED AT LEAST ONE ART FORM	38%	44%	38%	38%	33%
Visual arts and craft	21%	21%	21%	22%	19%
Music	14%	12%	13%	14%	12%
Creative writing	13%	15%	13%	12%	12%
Dance	6%	8%	7%	5%	6%
Theatre	4%	7%	6%	4%	5%
None of these	62%	56%	62%	62%	67%

Q35. Over the last 12 months, have you created any of the following? Base: 2022 VIC data (n= 2,339) // Melbourne - inner metro (n= 261) // Melbourne - middle metro (n= 703) // Melbourne - outer metro (n= 460) // Melbourne - growth metro (n= 414)

6.2.1 Visual arts and craft

In 2022, 21% of the VIC population aged 15 years and over created visual arts and crafts, remaining consistent with 22% in 2019.

Visual arts and craft forms

The main forms of visual art and craft creation for Victorians are painting, drawing, printmaking or street art (10%), craft like ceramics, glass art, jewellery, textiles or woodcraft (10%), and photography (10%). 5% created digital or video art and 3% created sculpture, installation or light projections.

6.2.2 Music

In 2022, 14% of the VIC population aged 15 years and over made music (down from 16% in 2019).

Music forms

One in ten (10%) Victorians played a musical instrument in the last 12 months, while 4% sung and 5% wrote songs, mixed or composed music.

6.2.3 Creative writing

In 2019, 13% of the VIC population aged 15 years and over produced creative writing (consistent with 13% in 2019).

Creative writing forms

Six percent of Victorians are novel/short story writers, while 4% are poetry writers, 4% write creative non-fiction and 2% write instructional non-fiction. 2% of Victorians write graphic novels or comics and the same number write plays (2%).

6.2.4 Dance

In 2022, six percent of Victorians aged 15 years and over (down from 8% in 2019) created or participated in dance.

Dance forms

The most popular dance form Victorians have creatively participated in is street dance or hip hop (3%). Followed by contemporary dance, social or competitive dance and classical/ traditional / folk dance (all 2%). Ballet closely follows at 1%.

6.2.5 Theatre

Four percent of Victorians aged 15 and over created theatre, down from 2019 (7%).

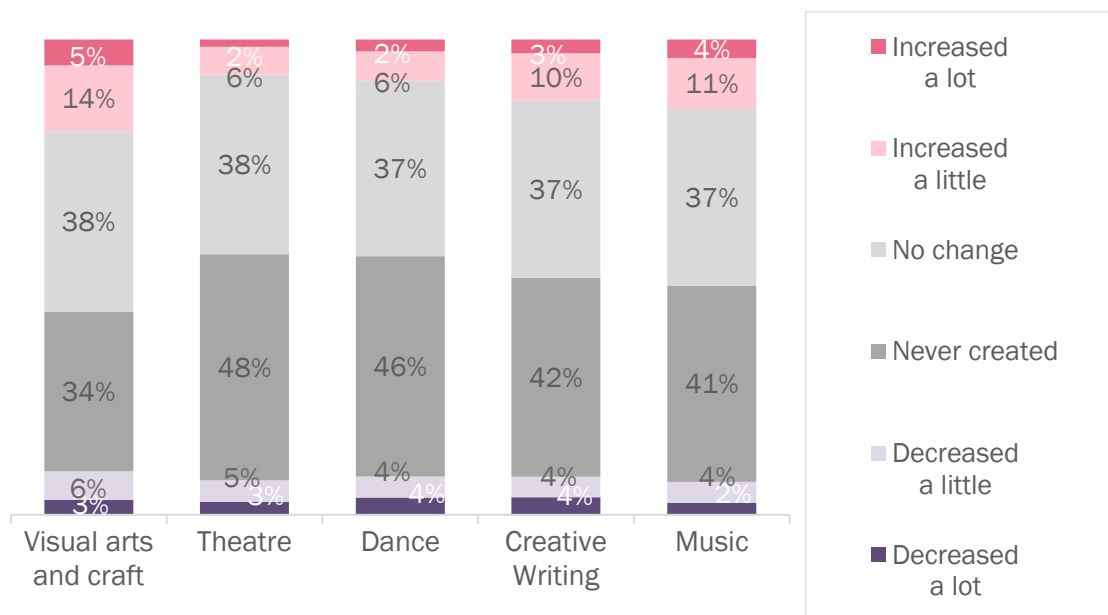
Theatre forms

The most popular form of theatre Victorians have creatively participated in is musical theatre or cabaret, traditional theatre or contemporary theatre and children's theatre (all 2%). Only one percent of Victorians created or participated in circus.

6.2.6 Creation and COVID-19

Depending on the art form, Australians' creative participation with the arts has either decreased slightly or remained unchanged since 2019. When asked how this has changed since before the COVID-19 pandemic, Victorians generally feel there was an increase in creation rather than a decrease.

Figure 53: Perceived change in art creation



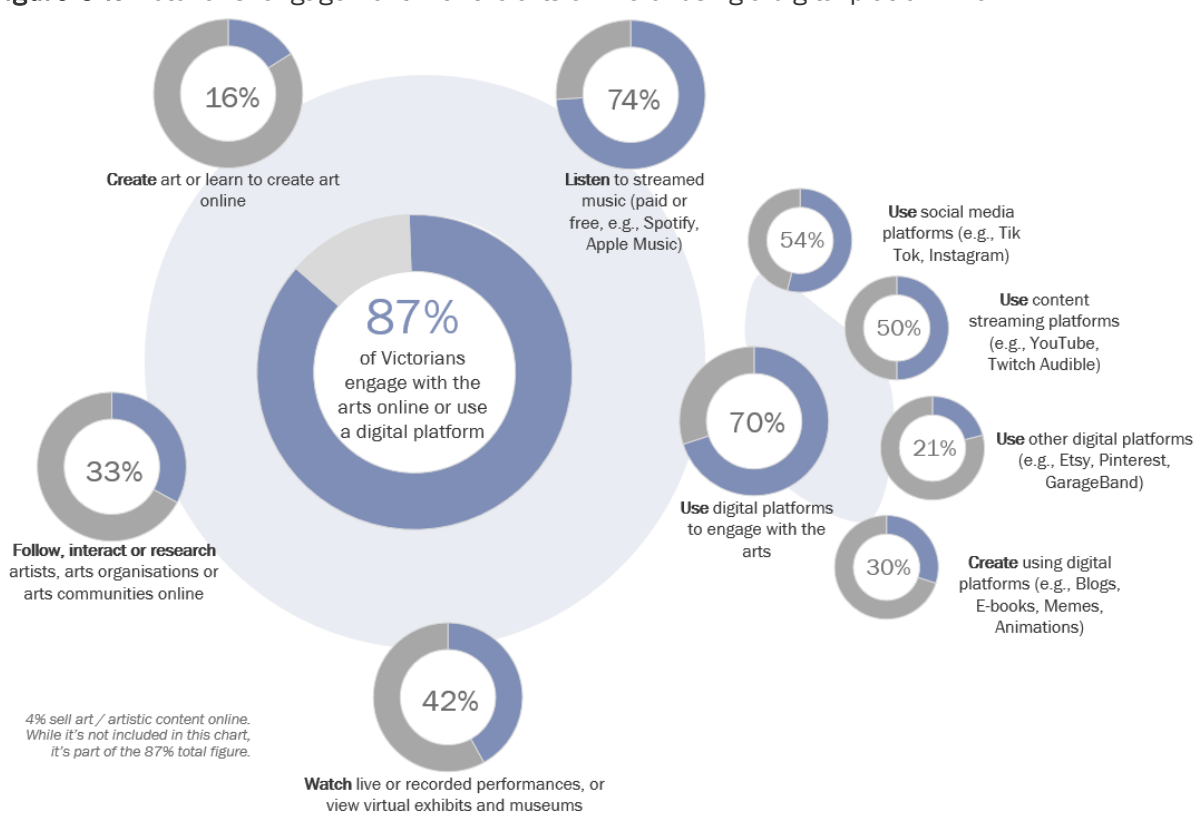
Q36. How has this changed compared to before the COVID-19 pandemic? Base: 2022 VIC data (n= 2,339)

7 Online and digital engagement with the arts

7.1 Overall online and digital engagement with the arts

Most Victorians engage with the arts online or through digital platforms (87%). Three in four (74%) of Victorians *Listen to streamed music*, and a smaller proportion (70%) *Use a digital platform to engage with the arts*. Just over two in five (42%) Victorians use the internet to *Watch live or recorded performances, or view virtual exhibits and museums*, and a third (33%) use the internet to *Follow, interact or research artists or art communities*. Just one in six (16%) Victorians *Create art or learn to create art online*.

Figure 54: Victorians' engagement with the arts online or using a digital platform 2022

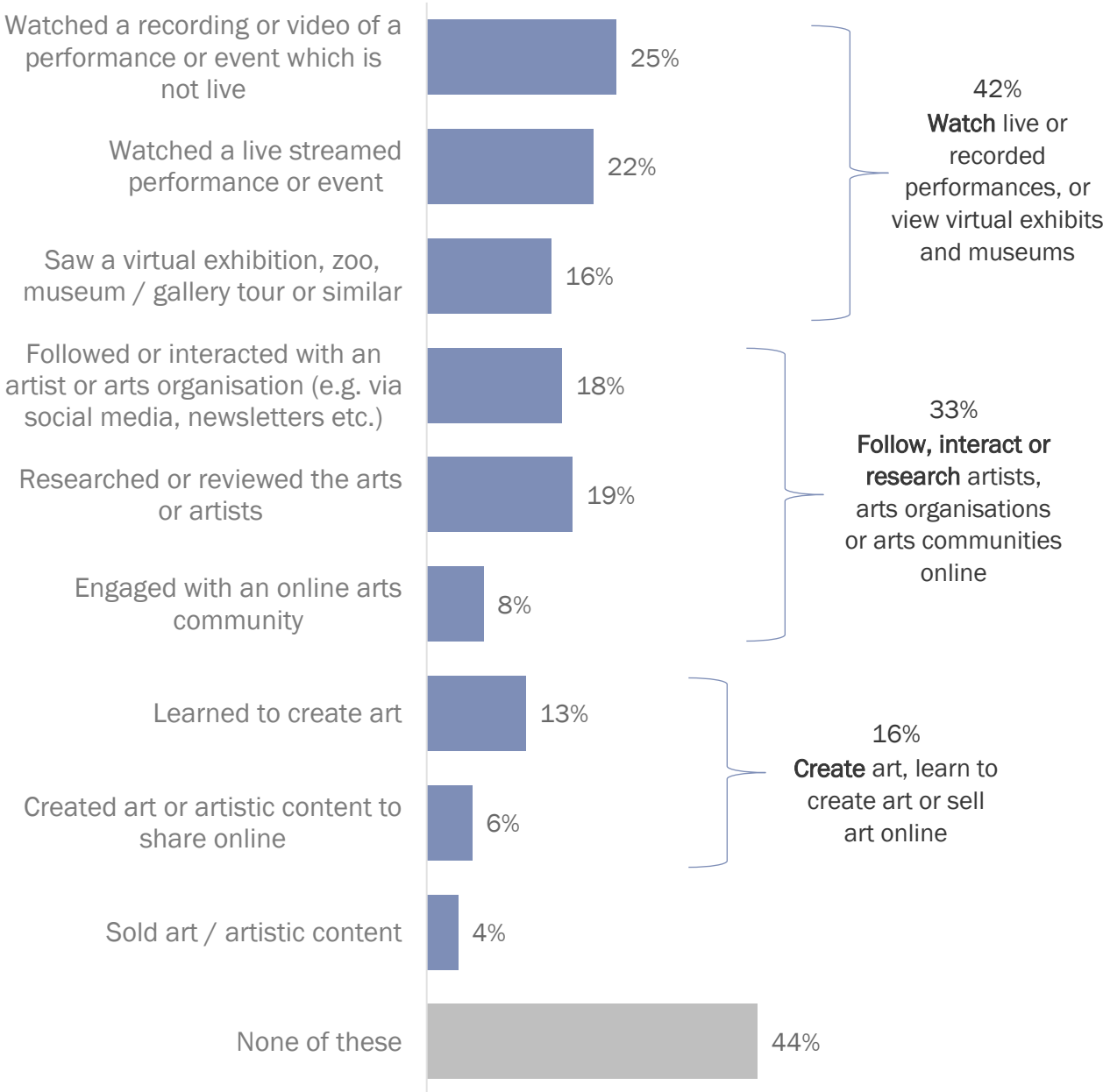


Base: Victorians 15+ (n= 2,339)

7.2 Accessing creative experiences and arts using the internet

The internet is a fundamental piece of technology in Australians' lives, and it's widely used to create and engage with the arts. Almost 3 in 5 (56%) Victorians have used the internet to engage with the arts or create art, mostly to *Watch live or recorded performances* (42%).

Figure 55: Victorians’ engagement with the arts using the internet 2022



Q45. Have you used the internet to do any of the following in the past 12 months? Base: VIC Population 15+ (n= 2,339)

Figure 56: Internet arts engagement 2022

Internet arts engagement	Australia Total	VIC Total
Used the internet	57%	56%
Watched a recording or video of a performance or event which is not live	26%	25%
Watched a live streamed performance or event	22%	22%
Researched or reviewed the arts or artists	20%	19%
Followed or interacted with an artist or arts organisation (e.g. via social media, newsletters etc.)	18%	18%
Saw a virtual exhibition, zoo, museum / gallery tour or similar	14%	16%
Learned to create art	14%	13%
Engaged with an online arts community	8%	8%
Created art or artistic content to share online	7%	6%
Sold art / artistic content	4%	4%
None of these	43%	44%

Q45. Have you used the internet to do any of the following in the past 12 months? Base: 2022 Australia data (n= 9,396) // 2022 VIC data (n= 2,339)

Figure 57: Internet arts engagement 2022 – Melbourne Metro breakdown

Internet arts engagement	VIC total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
Used the internet	56%	64%	58%	58%	59%
Watched a recording or video of a performance or event which is not live	25%	26%	25%	23%	28%
Watched a live streamed performance or event	22%	24%	23%	21%	23%
Researched or reviewed the arts or artists	19%	28%	20%	18%	18%
Followed or interacted with an artist or arts organisation (e.g. via social media, newsletters etc.)	18%	22%	18%	19%	18%
Saw a virtual exhibition, zoo, museum / gallery tour or similar	16%	18%	16%	19%	18%
Learned to create art	13%	14%	14%	12%	12%
Engaged with an online arts community	8%	10%	8%	7%	8%
Created art or artistic content to share online	6%	8%	7%	7%	5%
Sold art / artistic content	4%	7%	4%	3%	6%
None of these	44%	36%	42%	42%	41%

Q45. Have you used the internet to do any of the following in the past 12 months? Base: 2022 VIC data (n= 2,339) // Melbourne - inner metro (n= 261) // Melbourne - middle metro (n= 703) // Melbourne - outer metro (n= 460) // Melbourne -growth metro (n= 414)

7.2.1 Engaging with the arts using digital platforms

From social media to streaming platforms, there are many different avenues for Australians to access and engross themselves with art digitally. Most Victorians (70%) use digital platforms to access creative experiences and arts or for creating art:

- 68% of Victorians use digital platforms to specifically engage with creativity, culture and art,
- 30% of Victorians use digital platforms to create art.

7.2.2 Using digital platforms and social media to engage with the arts

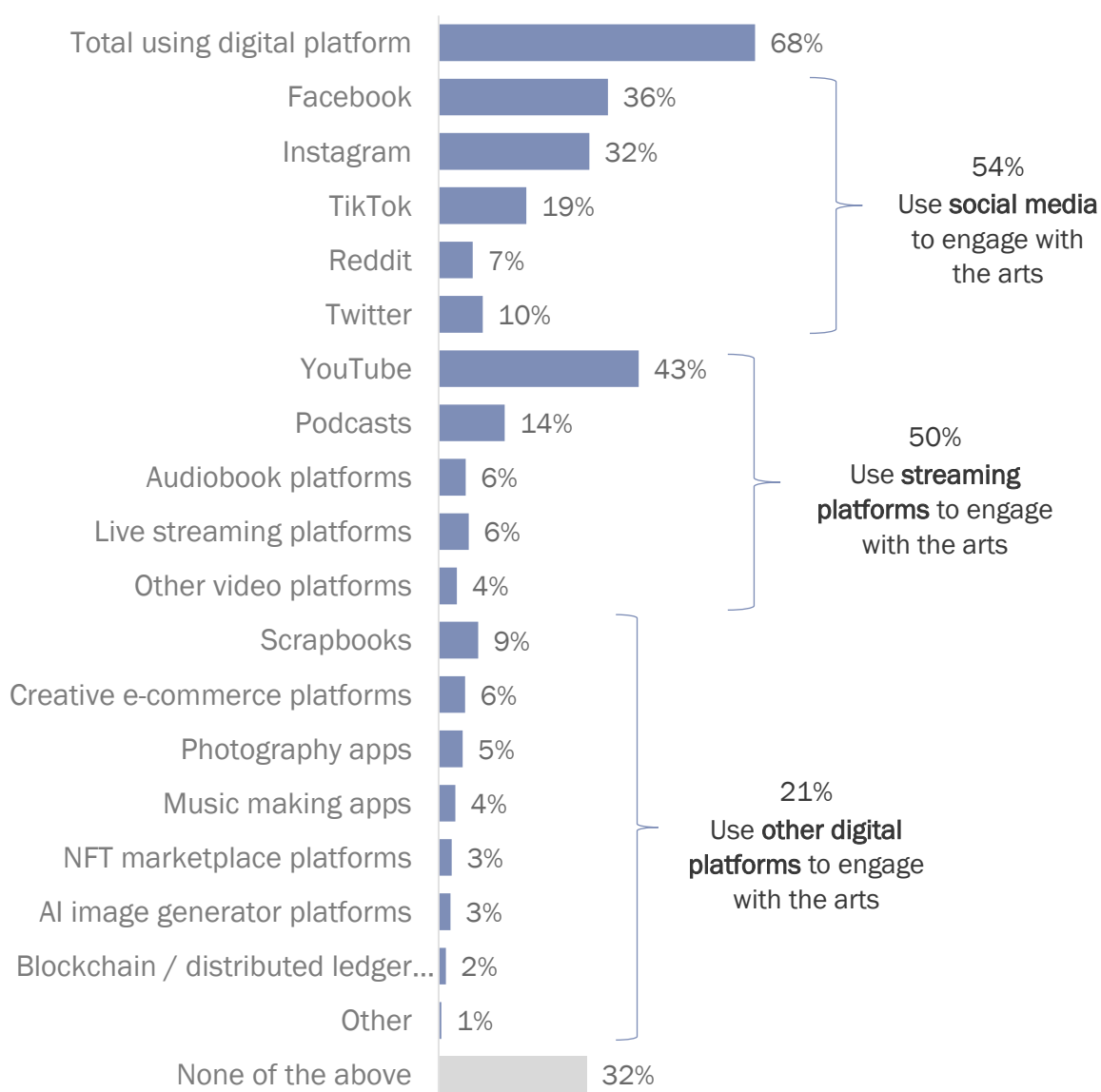
In NAPS 2019, a similar question was asked to gauge Australians' use of digital platforms not just for entertainment but specifically to engage with creativity, culture and art. However, as the digital category evolves quickly, and a number of new platforms have been introduced since 2019, more selections were added in 2022 and as a result, NAPS 2019 and NAPS 2022 cannot be compared like-for-like in relation to digital engagement.

Having said that, growth and expansion in this sector are clearly happening and NAPS 2022 data is able to capture that.

Seven in ten (68%) Victorians have used *Digital platforms and social media to engage with the arts*, with *Social media platforms* topping the list:

- More than half (54%) of those living in VIC Use *social media platforms* to engage with the arts,
- Half (50%) of those living in VIC Use *streaming platforms* to engage with the arts,
- One in five (21%) living in VIC Use *other digital platforms* to engage with the arts.

Figure 58: Victorians' engagement with digital and social media platforms 2022



Q47. Which of the following digital platforms, if any, have you used, not just for entertainment but specifically to engage with creativity, culture and art in the last 12 months? Base: VIC Population 15+ (n= 2,339)

Figure 59: Engagement with digital and social media platforms 2022

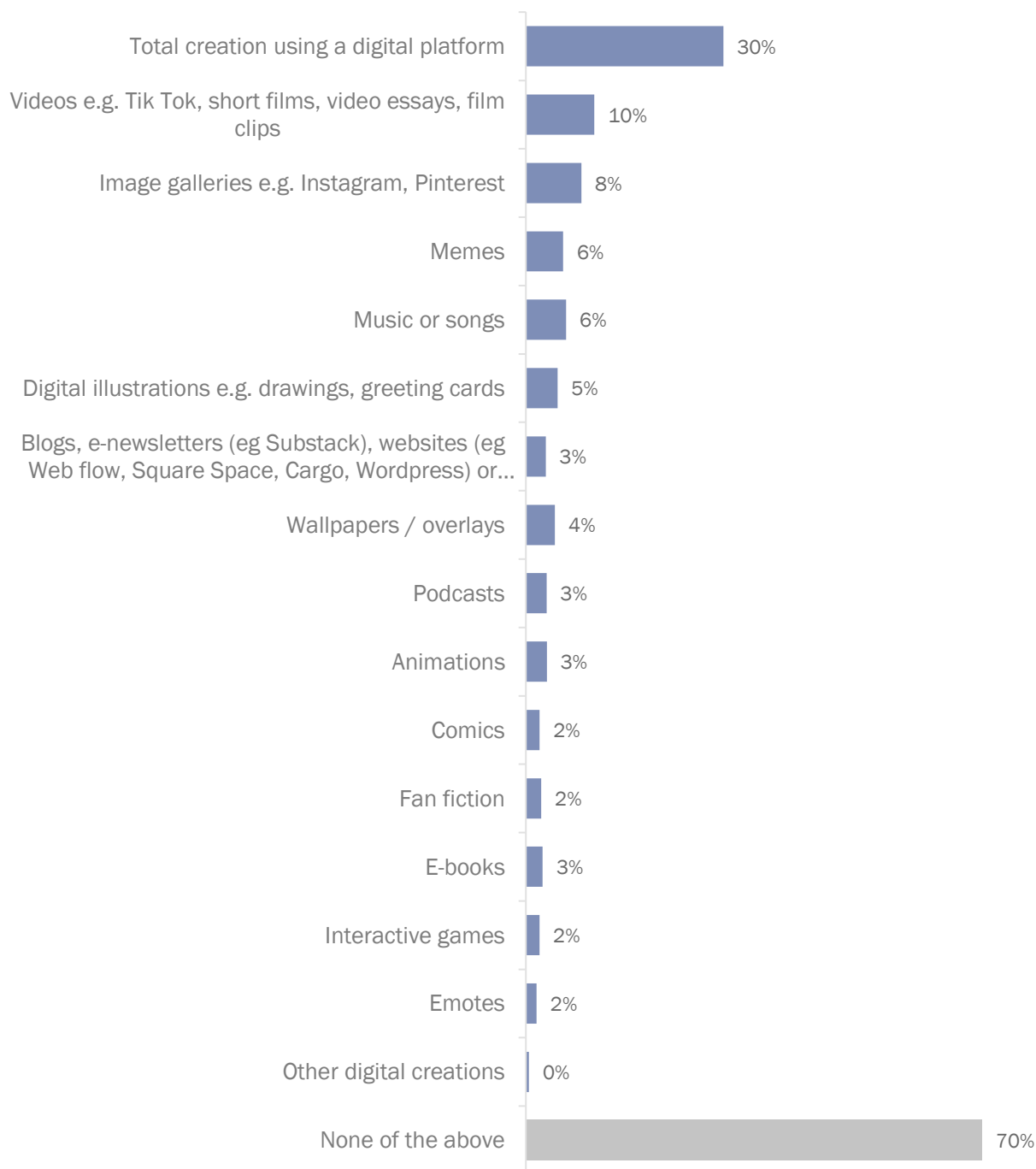
Internet arts engagement	Australia Total	VIC Total
Used digital platform	69%	68%
YouTube	44%	43%
Facebook	38%	36%
Instagram	31%	32%
TikTok	19%	19%
Podcasts	14%	14%
Scrapbooks (e.g., Pinterest, Tumblr and Arena)	9%	9%
Twitter	9%	10%
Reddit	7%	7%
Audiobook platforms (e.g., Audible)	6%	6%
Live streaming platforms (e.g., Twitch, Mixer, Eventcast)	6%	6%
Photography apps (e.g., VSCO, Flickr, imgur)	5%	5%
Creative e-commerce platforms (E.g., Etsy, Bandcamp)	5%	6%
Music making apps (e.g., Garage band / LMMS)	4%	4%
Other video platforms (e.g., Vimeo, Indigitube)	3%	4%
NFT marketplace platforms (e.g., OpenSea, Magic Eden)	2%	3%
AI image generator platforms (e.g., DALL-E, NightCafe)	2%	3%
Blockchain / distributed ledger technology (e.g., Ethereum, Quorum)	2%	2%
Other	1%	1%
None of the above	31%	32%

Q47. Which of the following digital platforms, if any, have you used, not just for entertainment but specifically to engage with creativity, culture and art in the last 12 months? Base: 2022 Australia data (n= 9,396) // VIC data (n= 2,339)

7.2.3 Creation using digital platforms

Three in ten Victorians express themselves creatively on digital platforms (30%), including through Videos (10%), Image galleries (8%) and Memes (6%).

Figure 60: Creation using digital and social media platforms 2022



Q48. Have you personally created any of the following in the last 12 months, using a digital platform?
 Base: VIC Population 15+ (n= 2,339)

Figure 61: Creation using digital and social media platforms 2022

Internet arts engagement	Australia Total	VIC Total
Created using a digital platform	31%	30%
Videos e.g. Tik Tok, short films, video essays, film clips	11%	10%
Image galleries e.g. Instagram, Pinterest	8%	8%
Music or songs	7%	6%
Memes	6%	6%
Wallpapers / overlays	5%	4%
Digital illustrations e.g. drawings, greeting cards	5%	5%
Podcasts	4%	3%
Animations	3%	3%
Blogs, e-newsletters (e.g. Substack), websites (e.g. Web flow, Square Space, Cargo, Wordpress) or chat bots (e.g. Joon Bot, Bot Star)	3%	3%
E-books	3%	3%
Interactive games	2%	2%
Comics	2%	2%
Fan fiction	2%	2%
Emotes	2%	2%
Other digital creations	1%	0%
None of the above	69%	70%

Q48. Have you personally created any of the following in the last 12 months, using a digital platform? Base: 2022 Australia data (n= 9,396) // 2022 VIC data (n= 2,339)

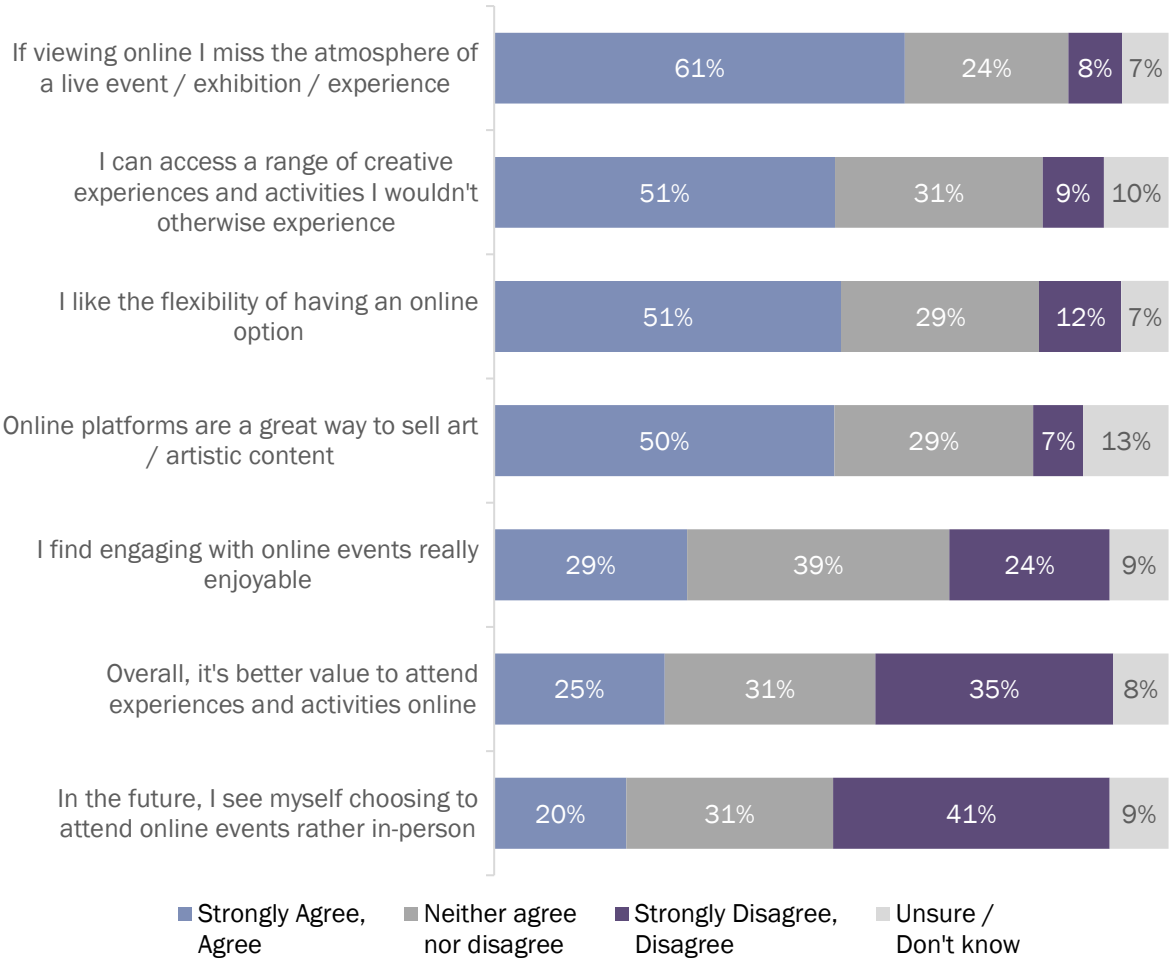
7.3 Flexibility of online and digital experiences and activities

In the last 12 months, 88% of Australians aged 15 or over have engaged with the arts online or through digital platforms. Amongst Victorians, the proportion is 87%.

When Victorians were asked about their experience with accessing creative experiences and activities online, half of respondents agreed that *I like the flexibility of having an online option* (endorsed by 51% of VIC 15+), *Online platforms are a great way to sell art / artistic content* (endorsed by 50% of VIC 15+) and *I can access a range of creative experiences and activities I wouldn't otherwise experience* (endorsed by 51% of VIC 15+).

Three in ten Victorians aged over 15 agreed that *Engaging with online events is really enjoyable* (29%). However, three in five (61%) Victorians aged 15+ *Miss the atmosphere of a live event / exhibition / experience when viewing online*, and a third (35%) don't believe *Overall it's better value to attend experiences and activities online*. While one in five (20%) Victorians aged 15+ would *Choose to attend online events over in-person events in the future*, twice the amount of people (41%) would not consider this.

Figure 62: Accessing creative experiences and activities online and through digital platforms

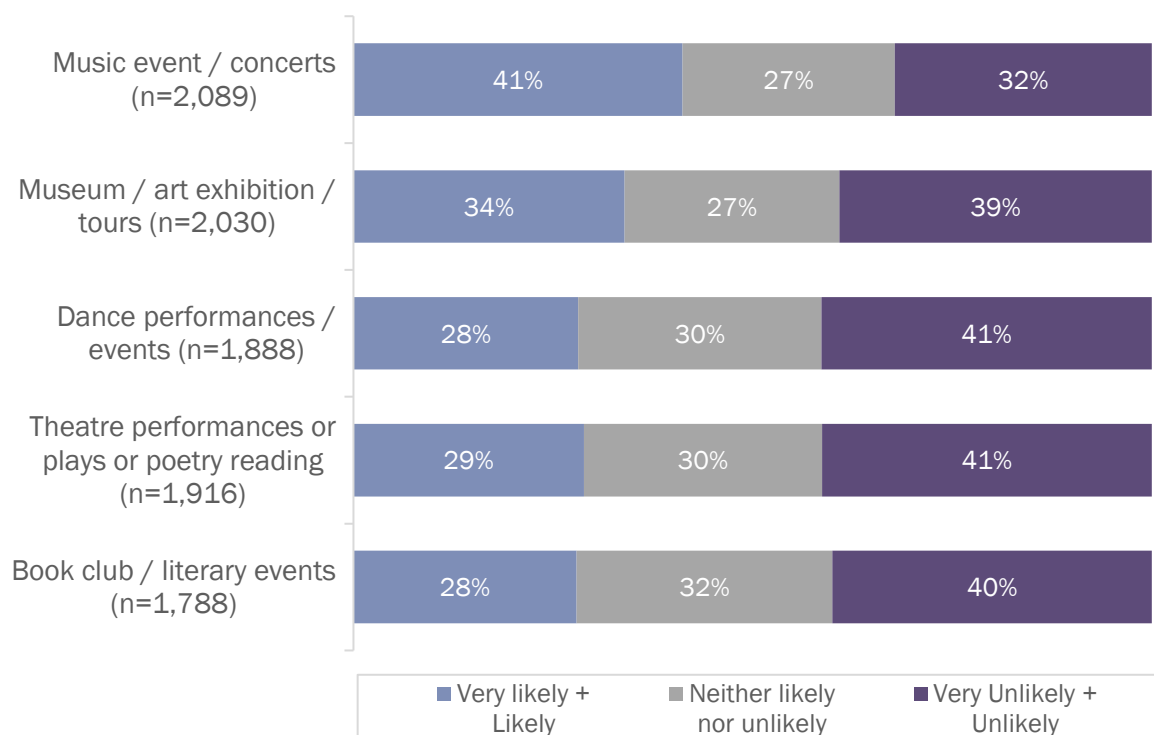


Q49. Thinking about your experience with accessing creative experiences and activities online, how much do you agree or disagree with the following statements? Base: VIC Population 15+ (n= 2,339)

In 2022, there was high engagement with digital platforms. Since events and activities were suspended for over a year during the pandemic, more Australians were exposed to creative activities and arts online and through digital channels. Accessibility to these online and digital arts events and creative activities was easy and only a few clicks away. If Victorians weren't able to attend arts events and experiences in person, some would be likely (very likely + likely) to attend the event online.

- Music event / concerts (41%)
- Museum / art exhibition / tours (34%)
- Dance performance / events (28%)
- Theatre performances / plays / poetry readings (29%)
- Book club / literary events (28%)

Figure 63: Victorians' likelihood to attend arts events online 2022



Q50. If you were not able to attend the events in person (e.g., due to location, costs or health), how likely would you attend the following events online? Base: VIC Population 15+ who attend the events

7.4 Change in online and digital engagement post-COVID

With the stay-home restrictions in 2020-21, Australians 15+ were choosing to interact with activities and arts online and through digital platforms. For many, restricted access to regular activities and more time at home during COVID-19 restrictions meant there was an opportunity to explore activities and try new things/art forms that they maybe hadn't been exposed to before.

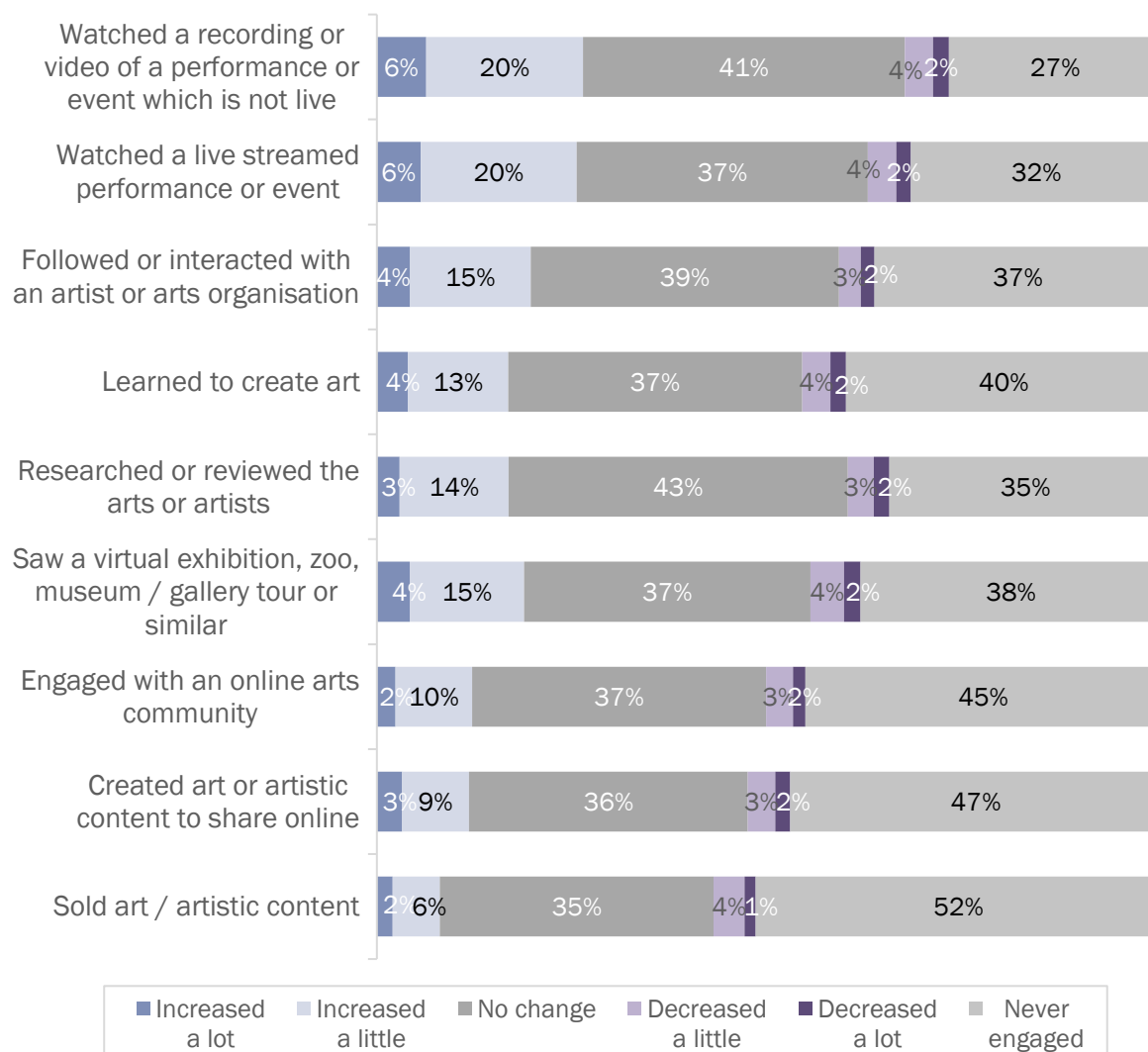
Being able to access these online, through streaming services and/or through familiar or even new digital platforms created new avenues for Australians to engage with creative activities and experiences that although there before, may not have been top of mind. Not only was accessing content online or through digital channels relatively easy from home, but digital content was also affordable and, in many instances, free of charge.

Overall, there has been an **increase in internet-based activities** since COVID-19 amongst Victorians, rather than a decrease, although between 35% and 43% report there being 'no change'. Many Victorians (between 27% and 52%) still haven't engaged with these activities, with watching a recording or video of a performance or event and watching a live streamed performance or event, being the most popular.

The online activities that have seen the most increase in engagement among Victorians 15+ are watched recordings and interaction with arts / artists:

- Watched a recording or video of a performance or event which is not live (26%)
- Watched a live streamed performance or event (25%)
- Followed or interacted with an artist or arts organization (20%)

Figure 64: Change in online and digital engagement

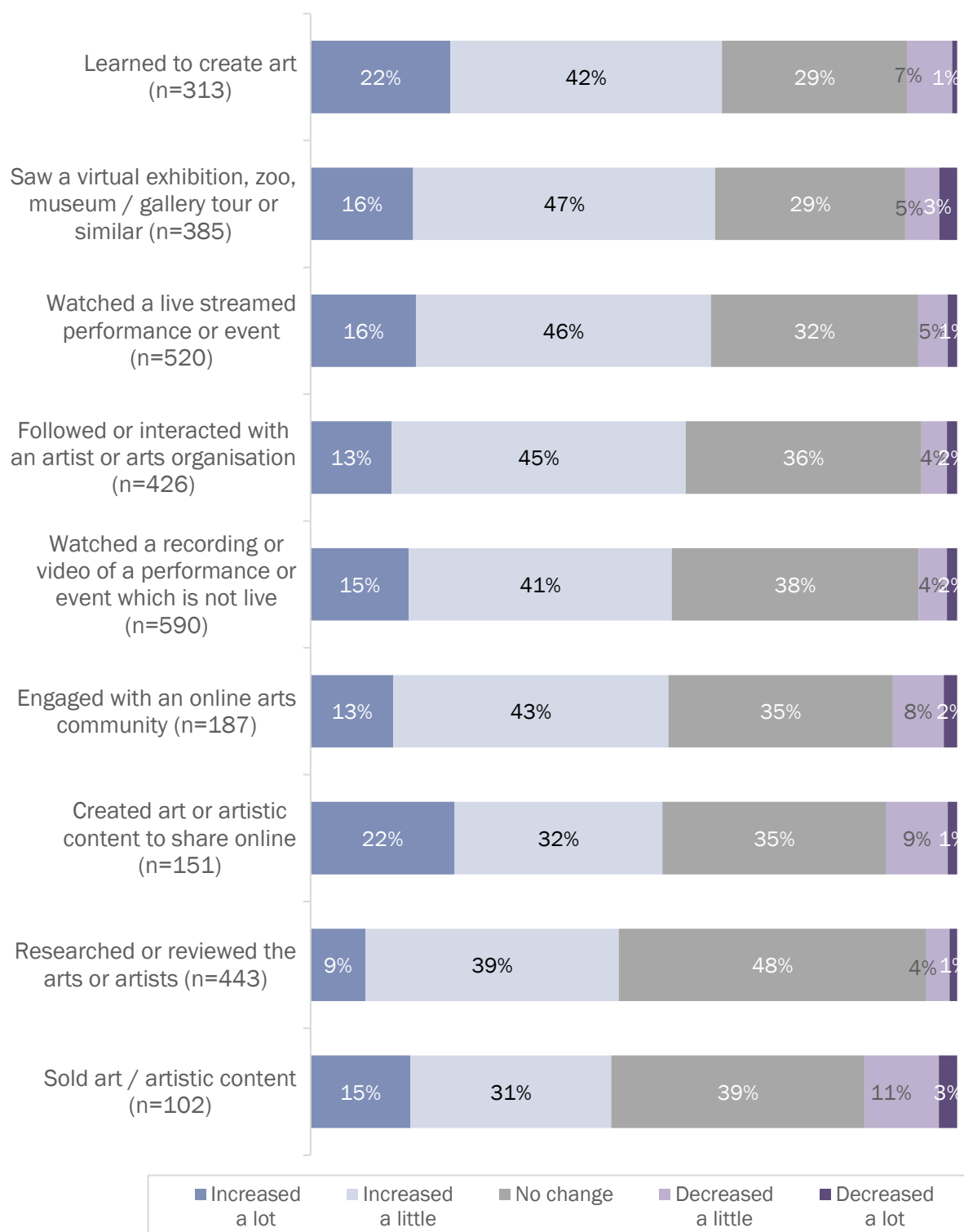


Q46. How has this changed compared to before the COVID-19 pandemic? Base: VIC 15+ (n= 2,339)

Among those who have engaged with internet-based art and creative activities in the last 12 months, nearly half have seen an increase in their specific engagement with each category since the pandemic, with the largest increases seen in using the internet to learn to create art.

- Learned to create art (64% increase)
- Saw a virtual exhibition, zoo, museum / gallery tour or similar (63% increase)
- Watched a live streamed performance or event (62% increase)
- Followed or interacted with an artist or arts organisation (58% increase)
- Watched a recording or video of a performance or event which is not live (56% increase)
- Engaged with an online arts community (55% increase)
- Created art or artistic content to share online (54% increase)
- Researched or reviewed the arts or artists (48% increase)
- Sold art / artistic content (47% increase)

Figure 65: Change in online engagement among those who have engaged with each activity in the last 12 months



Q46. How has this changed compared to before the COVID-19 pandemic? Base: VIC 15+ who engaged with each activity

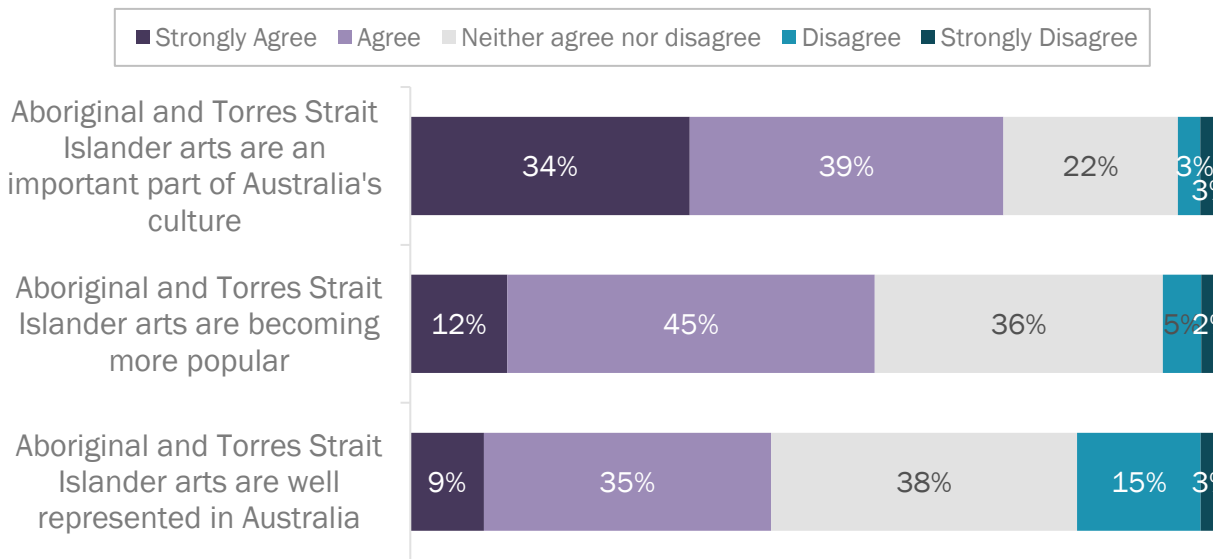
8 Our cultural identity and diversity

8.1 Attitudes to First Nations arts

In 2022, there is widespread agreement that *Aboriginal and Torres Strait Islander arts are an important part of Australia’s culture*, with 3.895 million Victorians agreeing, or 73% of the population aged 15 years and over. Agreement has slightly decreased since 2019 (75%).

Despite such art being valued, less than half of Victorians believe that *Aboriginal and Torres Strait Islander arts are well represented in Australia* (44%). This is a similar sentiment from 2019 (48%).

Figure 66: Attitudes to First Nations Arts 2022



Q34. To what extent do you agree or disagree with each of the following statements? Base: 2022 VIC data (n= 2,339)

8.2 Interest in First Nations arts

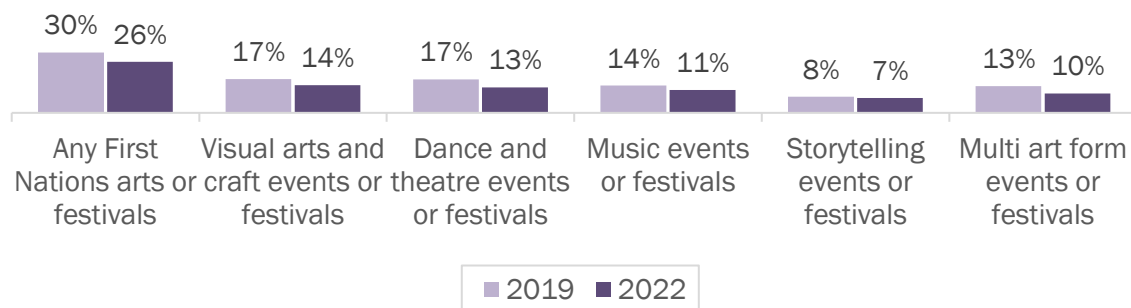
In 2022, 2.11 million Victorians were interested in First Nations arts, or 40% of the population aged 15 years and over. Interest has increased from 38% in 2019.

Whilst interest in First Nations arts remains unchanged for most (70%), one in five (22%) Victorians have a growing interest in First Nations arts in 2022. This is an increase from the number of Victorians who reported a growing interest in First Nations arts in 2019 (19%).

8.3 Attending First Nations events and festivals

In 2022, 1.35 million Australians (1,358) from VIC, representing 26% of the population aged 15 years and over attended First Nations arts, cultural activities or festivals. Attendance has decreased since 2019 (30%).

Figure 67: VIC attendance at First Nations Arts including festivals, 2019 and 2022

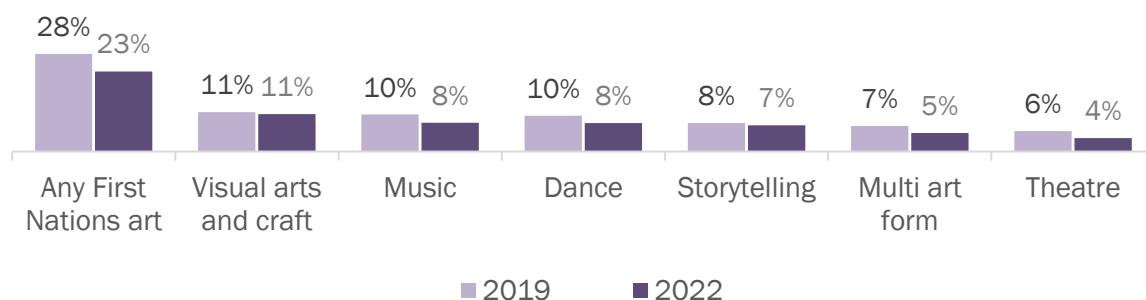


Q12. Thinking about the festivals you have attended, were any of these Aboriginal or Torres Strait Islander festivals?
 Q31. Have you attended or seen any of the following Aboriginal and/or Torres Strait Islander arts or cultural activities in the past 12 months? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

8.3.1 Attending First Nations arts or cultural events

In 2022, almost a quarter (23%) Victorians aged 15 years and over attended First Nations arts or cultural activities. This is a decrease from 28% in 2019.

Figure 68: Attendance at First Nations Arts 2019 and 2022



Q31. Have you attended or seen any of the following Aboriginal and/or Torres Strait Islander arts or cultural activities in the past 12 months? This includes arts that you have seen as part of festivals or special events (e.g. NAIDOC week activities)? Base: 2019 VIC data (n= 2,281) // 2022 VIC data (n= 2,339)

Figure 69: First Nations Arts events 2022

First Nations Arts attendance	Australia Total	VIC Total
Attended at least one event	25%	23%
Visual arts and craft	12%	11%
Dance	11%	8%
Music	10%	8%
Storytelling	8%	7%
Multi art form	5%	5%
Theatre	4%	4%
None of the above	75%	77%

Q31. Have you attended or seen any of the following Aboriginal and/or Torres Strait Islander arts or cultural activities in the past 12 months? This includes arts that you have seen as part of festivals or special events (e.g. NAIDOC week activities)? Base: 2019 AUS data (n=9,396) // 2022 VIC data (n= 2,339)

Figure 70: First Nations Arts events 2022 – Melbourne Metro breakdown

First Nations Arts attendance	VIC Total	Melbourne Metro			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
Attended at least one event	23%	30%	24%	23%	25%
Visual arts and craft	11%	15%	10%	11%	13%
Dance	8%	12%	7%	9%	9%
Music	8%	8%	8%	10%	8%
Storytelling	7%	10%	8%	6%	9%
Multi art form	5%	8%	5%	5%	7%
Theatre	4%	4%	5%	5%	4%
None of the above	77%	70%	76%	77%	75%

Q31. Have you attended or seen any of the following Aboriginal and/or Torres Strait Islander arts or cultural activities in the past 12 months? This includes arts that you have seen as part of festivals or special events (e.g. NAIDOC week activities)? Base: 2022 VIC data (n= 2,339) // Melbourne – inner metro (n= 261) // Melbourne – middle metro (n= 703) // Melbourne – outer metro (n= 460) // Melbourne –growth metro (n= 414)

8.3.2 Attending First Nations festivals

In 2022, one in six (15%) Victorians aged 15 years and over attended a First Nations festival. This is a decrease from 2019, where 19% of Victorians attended First Nations festivals. Festivals where many art forms are exhibited are the most popular form of festival attended (6%), followed by visual arts festivals or fairs (6%).

Figure 71: First Nations Arts festivals 2022

First Nations Festival attendance	Australia Total	VIC Total
Attended at least one festival	17%	15%
Festivals where many art forms are exhibited	7%	6%
Visual arts festivals or fairs	7%	6%
Performing arts festivals e.g. theatre or dance	6%	5%
Music festivals	5%	5%
Another type of Aboriginal or Torres Strait Islander festival	1%	0%
None of these	28%	26%
Did not attend any festivals	83%	85%

Q12_REBASED. Thinking about the festivals you have attended, were any of these Aboriginal or Torres Strait Islander festivals? Base: 2022 Australia data (n=9,396) // 2022 VIC data (n= 2,339)

Figure 72: First Nations Arts festivals 2022 – Melbourne Metro breakdown

First Nations Festival attendance	VIC Total	Melbourne Metro			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
Attended at least one festival	15%	23%	17%	16%	15%
Festivals where many art forms are exhibited	6%	12%	7%	7%	6%
Visual arts festivals or fairs	6%	9%	7%	6%	6%
Performing arts festivals e.g. theatre or dance	5%	6%	6%	6%	4%
Music festivals	5%	4%	6%	7%	5%
Another type of Aboriginal or Torres Strait Islander festival	0%	0%	0%	0%	0%
None of these	26%	31%	26%	26%	23%
Did not attend any festivals	85%	77%	83%	84%	85%

Q12_REBASED. Thinking about the festivals you have attended, were any of these Aboriginal or Torres Strait Islander festivals? Base: 2022 VIC data (n= 2,339) // Melbourne – inner metro (n= 261) // Melbourne – middle metro (n= 703) // Melbourne – outer metro (n= 460) // Melbourne –growth metro (n= 414)

8.4 Engagement with own cultural background through arts

In 2022, three in ten (31%) of the VIC population engaged with their own cultural background, language group or community by attending events or festivals, or creating art. This is a decrease from 36% in 2019.

8.5 Attending live events for community connection

In 2022, one in four (26%) of the VIC population attended cultural and artistic events focused on their own cultural background, language group or community. This is a large decrease from 32% in 2019. Music is the main form of event attended (14%), followed by Festivals or Celebrations (10%). Theatre events saw 8% of the VIC population attending and 7% of Victorians attended Visual arts and Craft and Dance events respectively (both 7%). Only 5% of Victorians attended book or literary events from their own cultural background.

8.6 Location of cultural events

Concert halls or theatres (10%) are the main locations for Victorians attending cultural events, followed by Community centres or halls, local parks, Museums/galleries and stadiums or arenas (all 7%). This is followed by markets (6%). 5% of Victorians attended cultural events at the library.

8.7 Value of cultural events

Victorians who attend creative, cultural and artistic events focused on their own cultural background, language group or community see great value in doing so, with almost all (95%) citing at least one benefit.

Figure 73: Value of cultural events 2022

Value in attending cultural events	Australia Total	VIC Total
At least one value	96%	95%
Spending time with family and/or friends	54%	54%
I get to know people in my community	39%	34%
Improved health and wellbeing	38%	36%
I feel connected to my heritage	35%	36%
Knowing the wider community has more understanding of my culture	27%	26%
Preserving the practices of my heritage	25%	25%
My children can learn about and connect with their cultural background	23%	23%
Community support because I am living away from my home country	19%	19%
Other	1%	1%
None of the above	4%	5%

Q19. What value do these cultural events provide to you? Base: Those who engage with own cultural events in Aus (n=2,673) // in VIC (n=647)

Figure 74: Value of cultural events 2022 – Melbourne metro breakdown

Value in attending cultural events	VIC Total	Melbourne			
		Inner Metro	Middle Metro	Outer Metro	Growth Metro
At least one value	95%	93%	96%	96%	96%
Spending time with family and/or friends	54%	43%	56%	52%	54%
I get to know people in my community	34%	24%	34%	42%	29%
Improved health and wellbeing	36%	34%	35%	36%	38%
I feel connected to my heritage	36%	37%	37%	35%	44%
Knowing the wider community has more understanding of my culture	26%	26%	27%	29%	29%
Preserving the practices of my heritage	25%	32%	26%	18%	31%
My children can learn about and connect with their cultural background	23%	15%	22%	21%	37%
Community support because I am living away from my home country	19%	17%	19%	18%	25%
Other	1%	0%	1%	2%	0%
None of the above	5%	7%	4%	4%	4%

Q19. What value do these cultural events provide to you? Base: Those who engage with own cultural events in Aus 2022 VIC data (n= 647) // Melbourne – inner metro (n= 90) // Melbourne – middle metro (n= 205) // Melbourne – outer metro (n= 143) // Melbourne –growth metro (n= 118)

8.8 Cultural connection through creative participation

In 2022, 18% of Victorians aged 15 or over created art to engage with their own cultural background, language group or community. This is a decrease from 22% in 2019. Amongst Victorians who created art in the past year, just under half (47%) produced outputs to engage with their own cultural background, language group or community.

Within VIC, music is the most likely creation (7%) followed by visual arts and craft (6%). Creative writing is created by 5% of Victorians to engage with their own cultural background, language group or community.

9 The impact of COVID-19

The impact of COVID-19 on arts and creativity was important to measure in 2022 both as a way to capture and reflect what has happened as well as provide insight into the way forward for arts and creativity in 2023 and beyond.

9.1.1 NAPS 2022 survey data

A series of COVID-19 questions are included in the NAPS 2022 survey to capture the impact of the pandemic on arts and creativity. Questions are developed specifically to provide a quantified measure of key issues and insights that emerged from the qualitative work and issues known to the sector for which quantification would be of value.

Key questions and measures:

- Impact of COVID-19 on income, work and connection with family/friends
- Impact of COVID-19's stay-home restrictions on the role of arts and creative activities, including impact on social connections and mental health, discovery of new experiences
- Perceived increase or decrease in engagement with arts and creative activities (past 12 months)
- Impact of COVID-19 on attendance at live events, current level of concern, and what would reduce concerns
- Perceived cost of arts and creative events, willingness to pay for events, overall spend on arts and creative events and correlations to concerns over the rising cost of living.

9.1.2 NAPS 2022 data confirms COVID-19 restrictions are both positive and negative for Australians

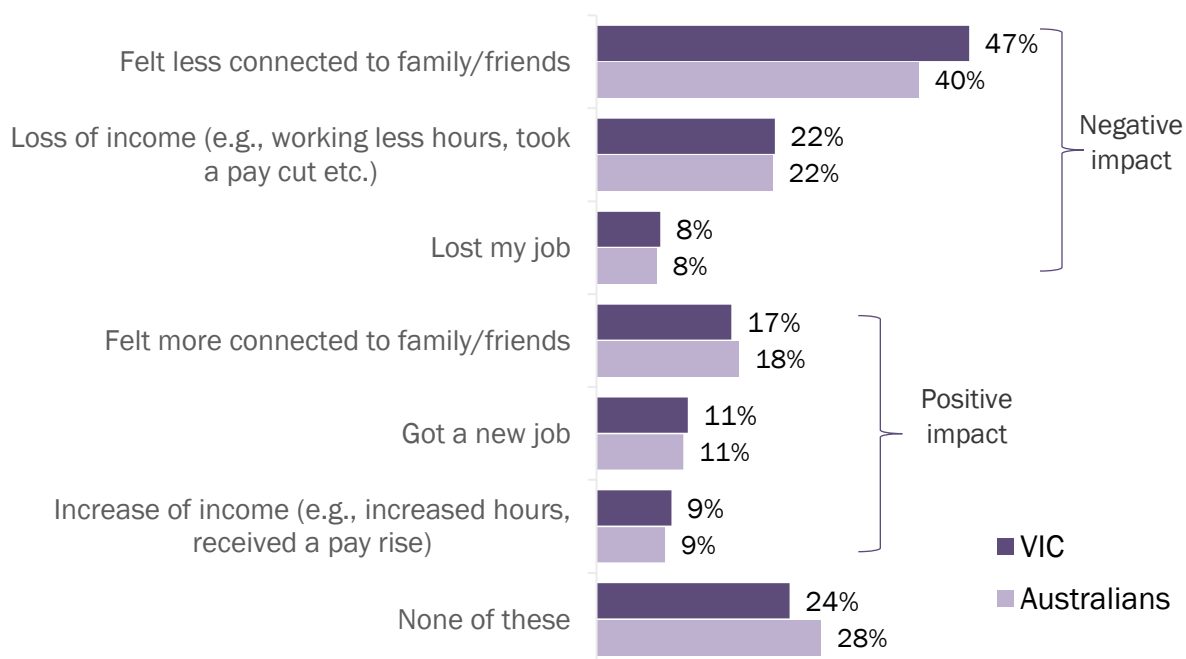
NAPS 2022 data confirmed that there are both positive and negative impacts during COVID-19 and the stay-home restrictions. Overall, half (53%) of Australians 15+ had a negative consequence with only 31% experiencing a positive impact. Amongst those living in VIC, almost three in five (58%) Victorians had a negative consequence.

On the contrary, almost a third (31%) of respondents from VIC had a positive outcome from COVID-19 and stay home restrictions, with 17% feeling more connected to family/friends, 11% starting a new job and 9% increasing their income.

Impact on connection with family and friends was particularly high with more registering a negative impact (47%) than a positive impact (17%).

Just over a quarter of Victorians (26%) either **lost their job** (8%) or **experienced reduced income** (22%).

Figure 75: Impact on lifestyle factors during COVID-19 and stay-home restrictions

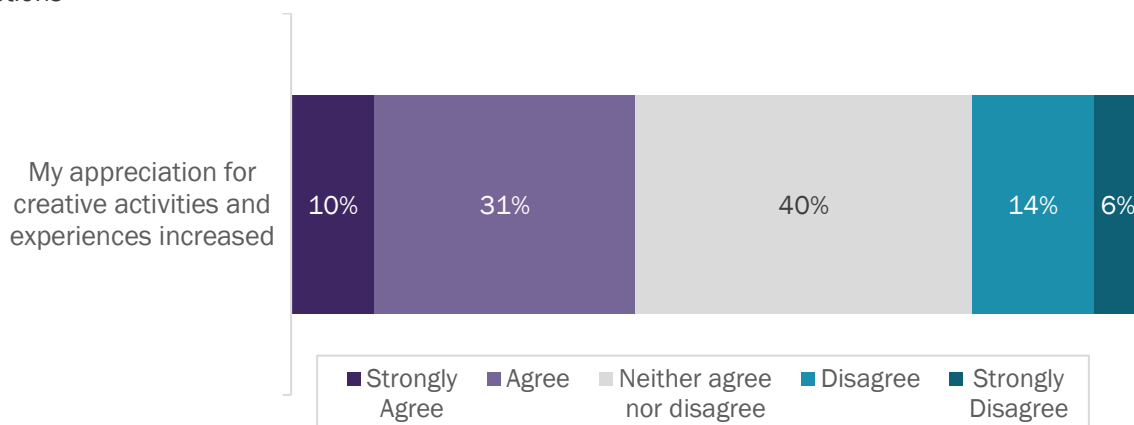


Q56. Thinking about your experience during COVID-19 and the stay-home restrictions. Which of the following, if any, applied to you? Base: Australians 15+ (n= 9,396) // VIC (n= 2,339)

9.1.3 Appreciation for creative activities was confirmed in NAPS 2022

Two in five (40%), or 2.15 million Victorians aged 15+ (2,153) believed their appreciation for creative activities and experiences had increased during COVID-19 and stay-home restrictions.

Figure 76: Appreciation for the arts during COVID-19 lockdowns and restrictions

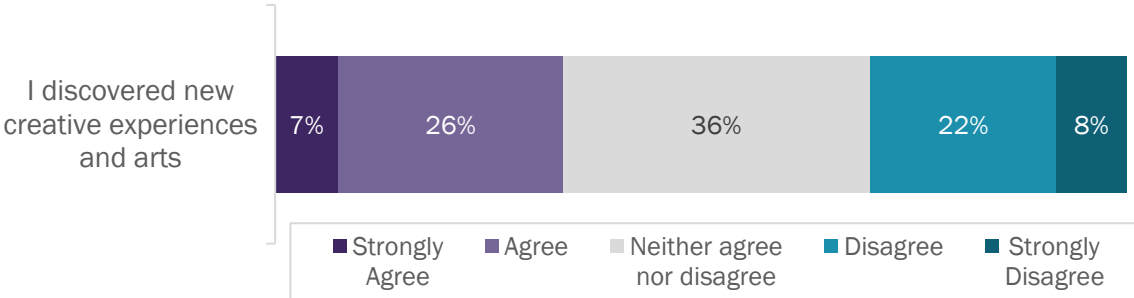


Q57. Thinking about your involvement with creative activities and experiences during the COVID and stay-home restrictions. How much do you agree or disagree with the following statements? Base: VIC 15+ (n= 2,339)

9.1.4 NAPS 2022 data confirms people discovered new creative experiences during COVID-19

A third (34%) or 1.80 million Victorians aged 15+ (1,801) discovered new creative experiences and arts during COVID-19 and stay-home restrictions.

Figure 77: Creative experiences and arts during COVID-19 and stay-home restrictions

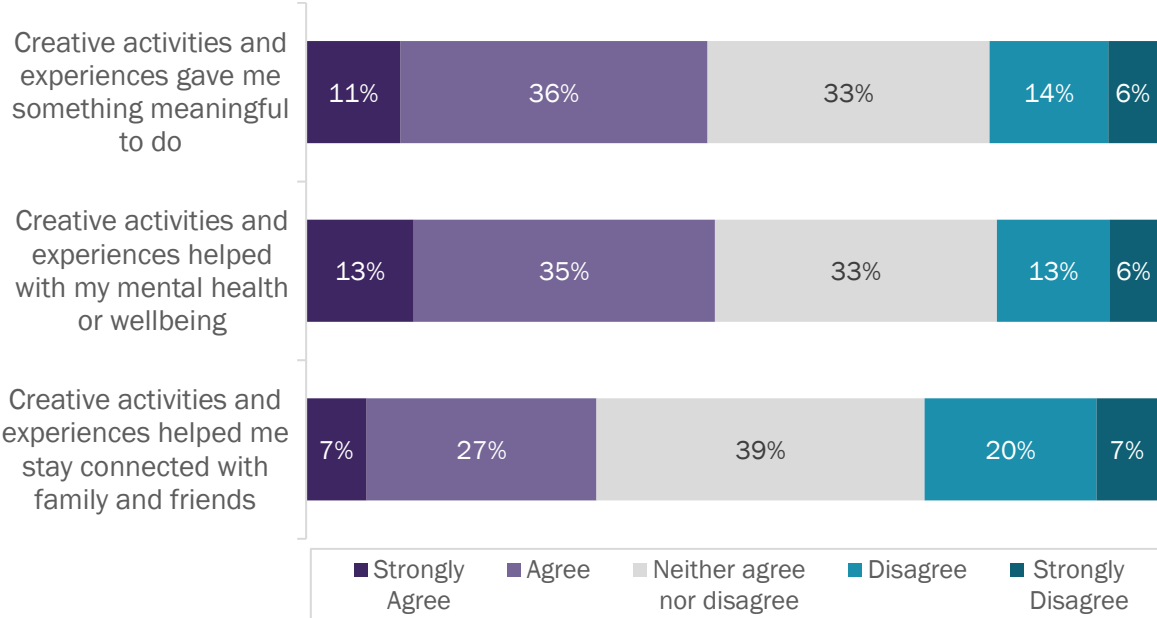


Q57. Thinking about your involvement with creative activities and experiences during the COVID and stay-home restrictions. How much do you agree or disagree with the following statements? Base: VIC 15+ (n= 2,339)

9.1.5 NAPS 2022 data confirms the positive impact of creative activities during COVID-19

Nearly half (48%) or 2.55 million Victorians aged 15 or over (2,557) believe creative activities and experiences helped with their mental health or wellbeing and about the same proportion (47%) believed it gave them something meaningful to do during during COVID-19 and stay-home restrictions. A third (34%) or 1.81 million Victorians aged 15 or over (1,816) found arts and creative activities helped them stay connected to family and friends.

Figure 78: Creative experiences and arts during COVID-19 and stay-home restrictions

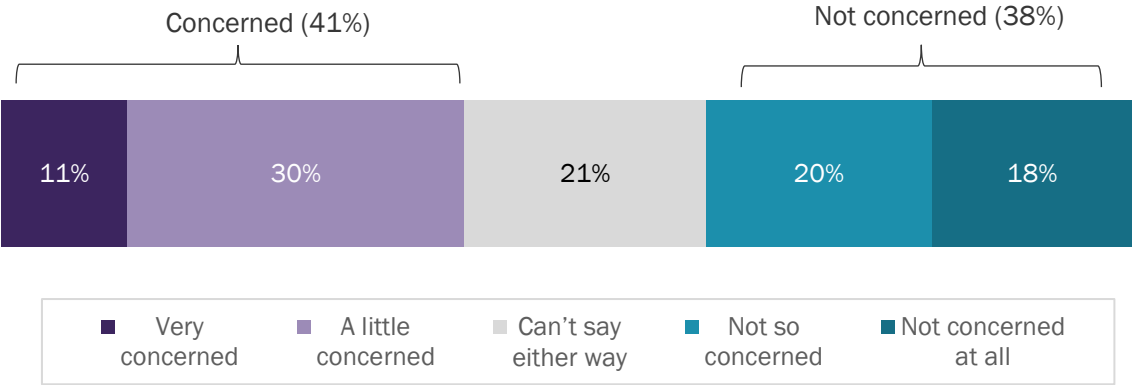


Q57. Thinking about your involvement with creative activities and experiences during the COVID and stay-home restrictions. How much do you agree or disagree with the following statements? Base: VIC 15+ (n= 2,339)

9.1.6 NAPS 2022 data confirms that 45% of people still have concerns

A question was included in NAPS 2022 which measured people’s level of concern around attending creative events and experiences in person. The results show that two in five Victorians (41%) are concerned about attending creative events and experiences in person. A similar proportion (38%) are not concerned while a fifth (21%) couldn’t say either way.

Figure 79: Concerned about attending events at the present time

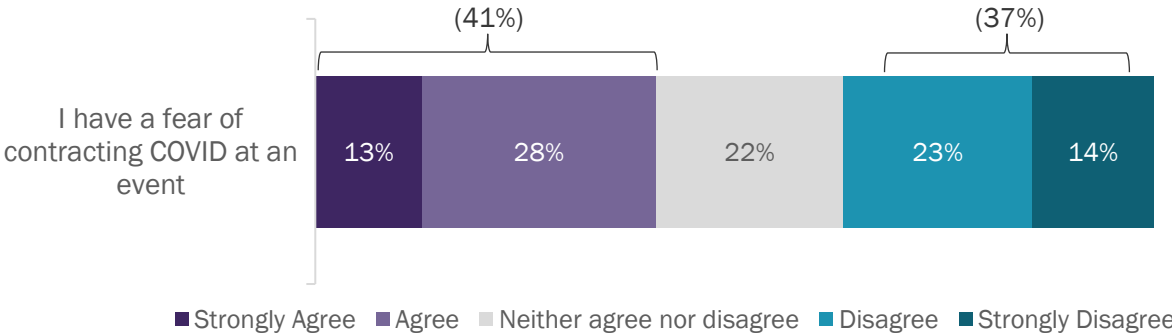


Q55. Thinking about attending creative events and experiences in person at the present time. To what level are you concerned about attending these types of events. Base: VIC 15+ (n= 2,339)

9.1.7 Concerns around contracting COVID

As there are no longer COVID-19 restrictions and Australians are engaging with creative experiences and events in person, 41% of Victorians have a fear of contracting COVID-19 at an event and 41% of Victorians are still concerned about attending these events. Amongst those concerned, 73% have a fear of contracting COVID. Conversely, among those who are not concerned about attending an event, only 11% fear contracting COVID-19.

Figure 80: Fear of contracting COVID at an event

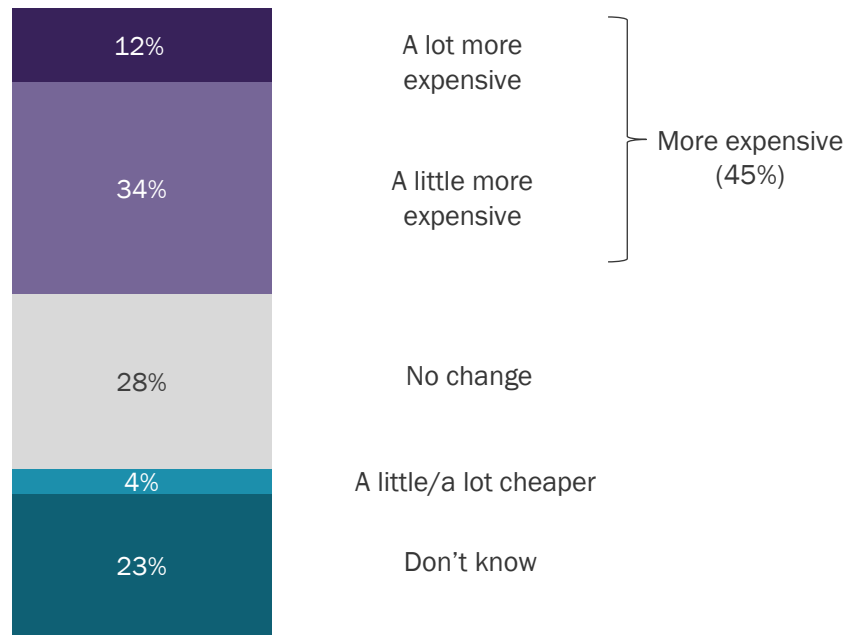


Q23_1. To what extent do you agree or disagree with the following statements? - I have a fear of contracting COVID at an event? Base: VIC 15+ (n= 2,339)

9.1.8 Issues around cost of arts and creative events

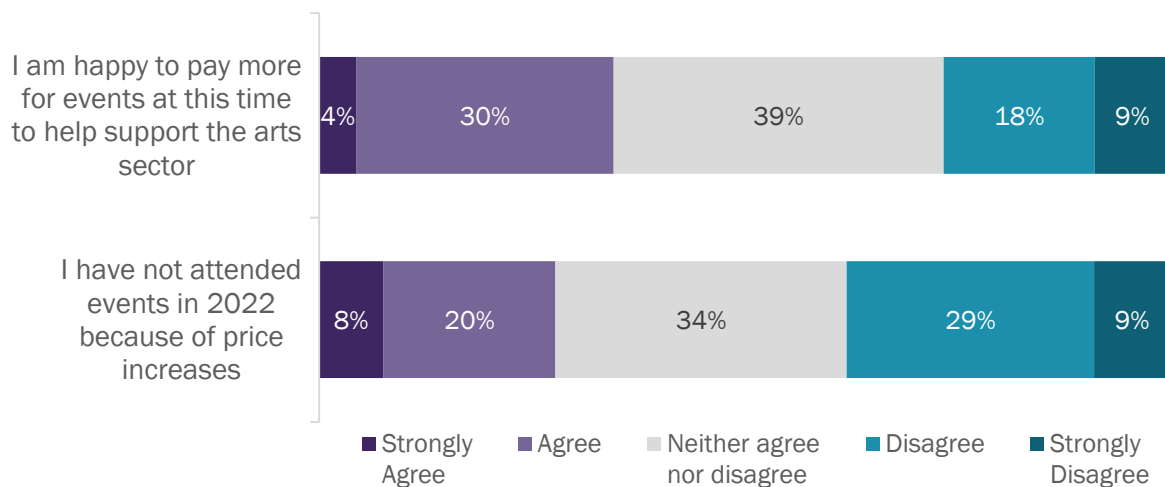
The cost of arts and creative events was predicted to be an issue associated with lower attendance and a slowness in getting back to attending events as frequently as prior to COVID. More than two in five (45%) Victorians aged 15+ found events are more expensive now than before the pandemic, and only 4% found them cheaper.

Figure 81: Change in price of individual events compared to before the COVID-19



Q15. How has the price of individual arts, cultural and creative events changed compared to before the COVID-19 pandemic? Base: VIC 15+ (n= 2,339)

Figure 82: Art events and prices

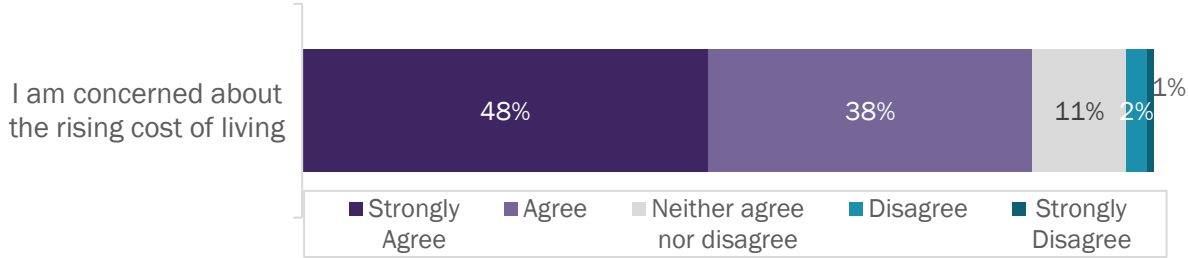


Q16. To what extent do you agree or disagree with each of the following statements? Base: VIC 15+ (n= 2,339)

Issues around costs are likely to be exacerbated by concerns around the rising cost of living

There have been many changes since the peak of the pandemic in 2020, but an issue that has widely been spoken about is the rising cost of living. When the research was conducted in late 2022, 86% of Victorians are concerned about the rising cost of living, with almost half (48%) voicing strong concerns.

Figure 83: Concerns about rising cost of living



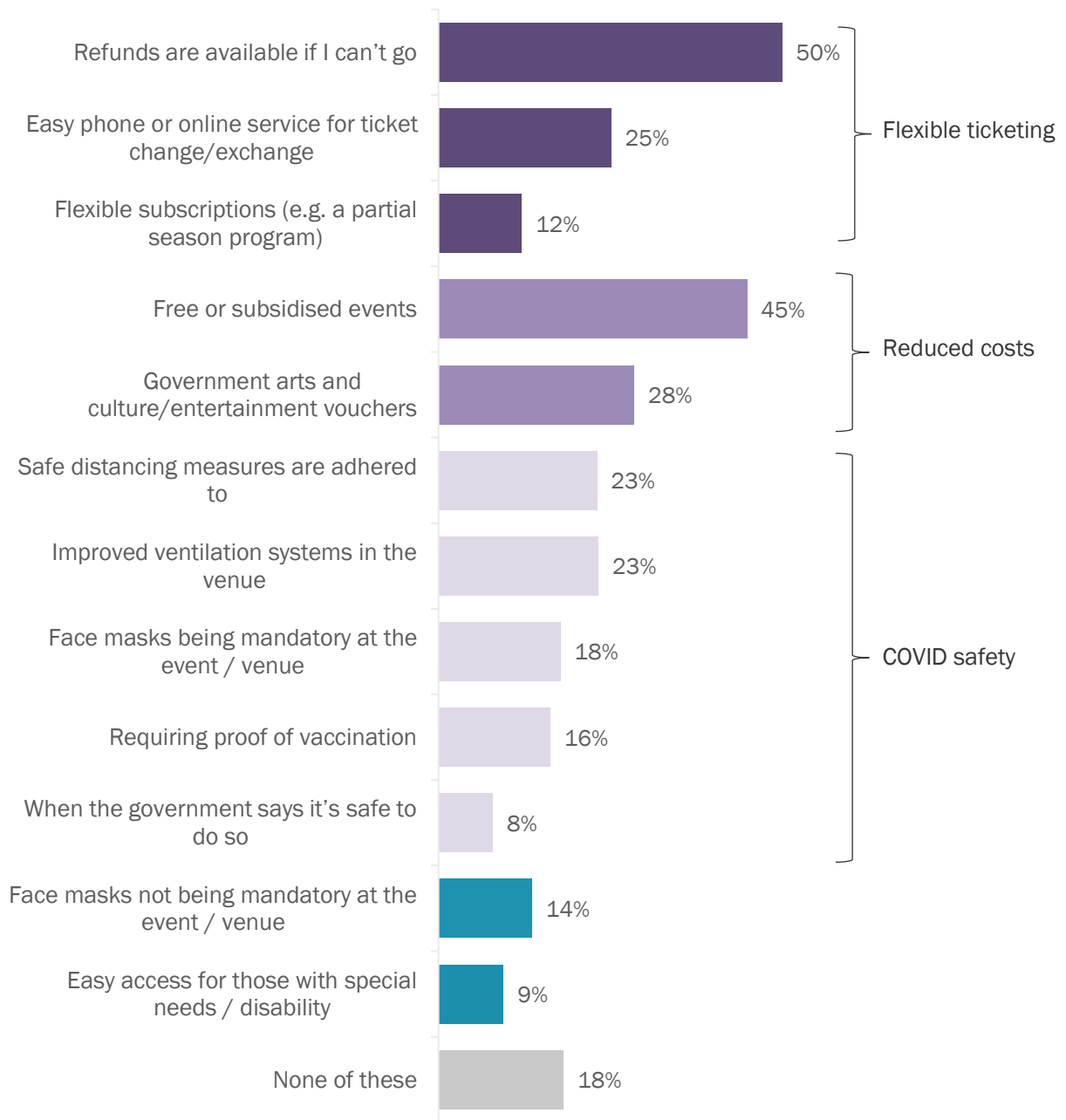
Q16. To what extent do you agree or disagree with each of the following statements? Base: VIC 15+ (n= 2,339)

9.1.9 Encouraging people back to live events

What would encourage attendance at art and creative events in person was more flexibility in relation to the ticketing of events with half of Victorian respondents wanting **assurance of refunds if they can't attend an event** (50%) and/or an easy phone or online service for ticket changes or exchanges (25%).

Reducing costs was also important, with 45% of Victorians supporting free or subsidised events and 28% supporting government arts and culture/entertainment vouchers.

Figure 84: What would encourage people to attend more creative, cultural and artistic activities



Q24. What would encourage you to attend more creative, cultural and artistic activities in person? Base: VIC 15+ (n= 2,339)