

bjrgwin



PATTERNMAKERS



MARCH 2021

# South Australia Snapshot

Audience Outlook Monitor



Government of South Australia

Department of the Premier  
and Cabinet

## Summary

### **Attendance in SA is the highest nationally — but risk-averse attendees continue to rely on adherence to COVID-safe policies**

The March 2021 results of the Audience Outlook Monitor show that confidence among SA audience members remains high, after months of low virus numbers.

During a busy festival period for the state, around 4 in 5 (79%) audience members in SA say they have recently attended a cultural venue or event and slightly more (85%) are making firm plans to attend an event in future. SA audiences are some of the most confident nationally, with their comfort attending most venues being stable or higher than it was in September 2020, such as museums and galleries (99%, stable with 98%), stadiums (82% up from 67%) and live music venues (62%, up from 41%).

However, some are signalling caution when COVID-safety measures are not properly adhered to, or when they've observed complacency at SA venues and events. As winter approaches, effective communication and implementation of COVID-safe arrangements will help to reassure those with a lower risk tolerance.

### **Participation in digital arts experiences has decreased, but there is appetite for on-demand content and online courses**

Consistent with national trends, the proportion of SA audiences participating in online arts and culture has declined from 61% in September 2020 to 42% in March 2021 – and SA audiences remain some of the least engaged online, compared to the national average (47%).

1 in 3 (35%) audiences participating online are currently paying for digital experiences, a slight drop from 39% in September 2020. While some are tiring of screens, others report being unaware of digital options, suggesting an opportunity area for wider reach into potential markets for digital arts experiences.

Among a list of potential features, many SA audience members are drawn to on-demand content (59%) and content that features artists or artistic leaders talking about their work (38%). Online courses or tutorials is now a relatively common form of participation (15%), after video content (22%), confirming another opportunity area for further investment.

## Introduction

### **This report summarises insights from data collected in March 2021 from over 1,400 SA audience members**

This South Australia (SA) Snapshot Report identifies insights from 1,407 survey respondents connected with SA organisations surveyed in March 2021 as part of the Audience Outlook Monitor. Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations, and festivals. On 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Throughout this report, comparisons have been highlighted between the different state and territory results. Note that the Northern Territory (NT) and Tasmania (TAS) samples in this study fall below 100 respondents, and this data has been marked with an asterisk (\*) within graphs to indicate that the results should be interpreted with caution.

In addition to this report, the March 2021 results are freely accessible in an interactive dashboard. Users can explore the data for all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources such as the dashboard, visit: [www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

Read on for the key March 2021 findings in SA.

## Current conditions

### **Comfort with public activities is growing and SA audiences are some of the most confident nationally**

As cases of the virus in SA have been generally lower and fewer restrictions have been in place, SA past attendees are among the most confident nationally, even after an outbreak resulting in a short lockdown period during November 2020.

Since data was last collected in September 2020, the proportion of SA audiences who feel comfortable doing a range of activities has increased, including eating at a local



restaurant (100% feel at least somewhat comfortable, up from 95%), using public transport (86%, up from 67%) and exercising at a gym or fitness studio (79%, up from 64%).

SA audiences are most similar in their comfort levels to those in Queensland (QLD), Western Australia (WA) and the NT. By comparison, audiences in Victoria (VIC), New South Wales (NSW), the Australian Capital Territory (ACT) and TAS are showing lower levels of comfort.

## Attending cultural events

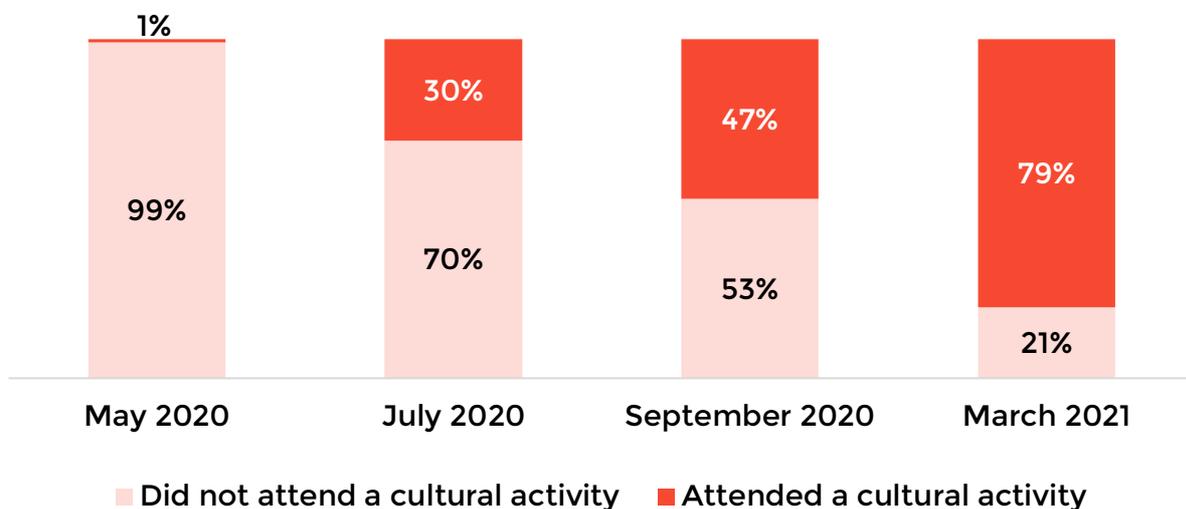
### 4 in 5 SA audience members are now attending live events

Attendance at live arts and cultural events is increasing, as venues and facilities continue to program activities in accordance with COVID-safe regulations in SA.

In early March 2021, during a busy period of festival programming in Adelaide, 4 in 5 (79%) SA audience members said they had attended a cultural activity in-person within the past fortnight – a rate that has increased since September 2020 (47%) and is the highest nationally (compared to a national average of 71%).

In terms of the types of activities engaged with, more than half (55%) of SA respondents said they recently attended a live performance. Many recently attended a fair or festival (32%), visited a museum or gallery (28%) or attended a cinema (27%), while a smaller proportion recently attended a lecture, artist talk or workshop (24%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (SA) n=1,407 (March 2021)





SA audiences are attending events at a higher rate than other areas, such as VIC (62%), QLD (69%) and the ACT (73%), where larger outbreaks have led to increased restrictions and lower audience confidence in general.

Figure 2: In the past fortnight, did you do a cultural activity in-person (not online)? (By state/territory) n=13,836



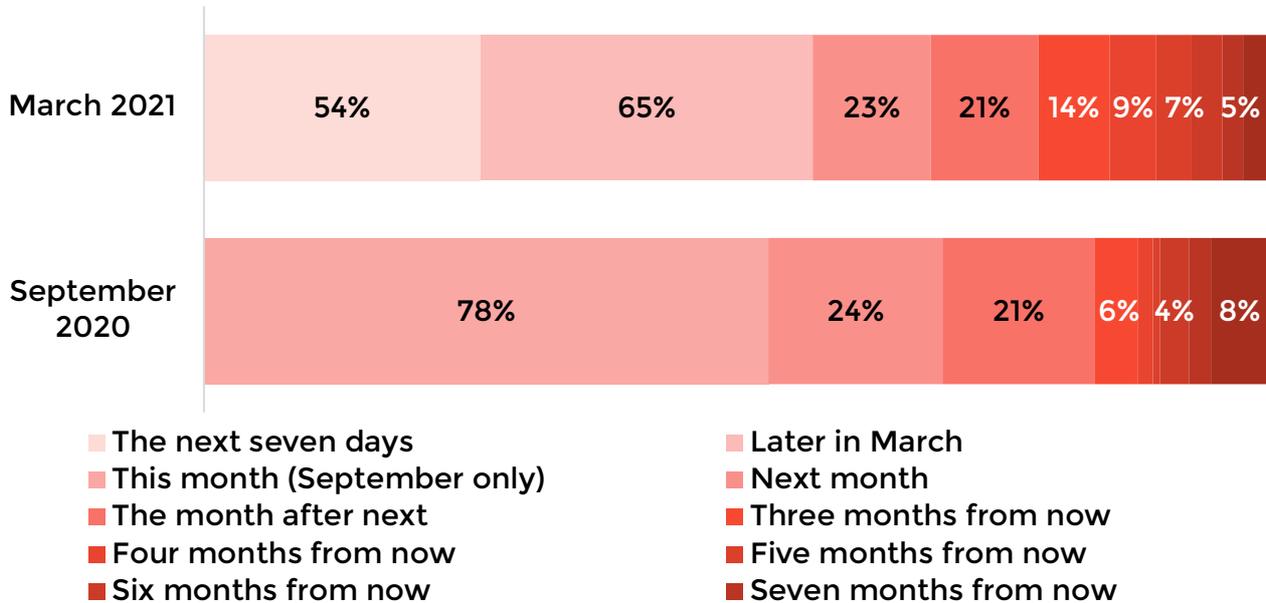
## Most audiences are making plans to attend events in the near future — especially live performances

SA audiences are signalling greater confidence in attending events in the near future, compared to September 2020. In the two weeks before data collection (3–7 March 2021), 85% said they made firm plans to attend an event in future, with most planning to attend a live performance (68%), a fair or festival (35%) or visit a museum or gallery (30%).

The greatest proportion of SA audiences are purchasing tickets for events in the month ahead, aligning with the festival season and in particular, Adelaide Fringe Festival programming. Most purchased tickets within the seven days after data collection (54%) or later in the month (65%), while around 1 in 4 said they were purchasing tickets for events in April (23%).



Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (select multiple) (SA) n=630 (March 2021)



## Nationally SA audiences are among the least concerned about the risk of virus transmission

Health risks and financial barriers are less prevalent in SA relative to other states and territories.

Since September 2020, the proportion of SA audiences who know of someone within their social network who has been sick with the virus has been consistent (6%, stable with 7%) and the proportion experiencing financial hardship as a result of the pandemic has dropped from 29% to 12%.

When asked about the factors preventing audiences from attending right now, 20% of SA audiences say that the risk of virus transmission prevents them from attending as they did in the past, a rate that is lower than the national average (26%). Concerns about virus transmission are strongest in VIC (34%) and NSW (32%), where cases have been the highest nationally, and lowest in SA (20%), WA (14%) and QLD (21%).

A very small proportion (1%) still cannot foresee going out until there is no risk at all (down from 6% in September 2020).



## The main barrier inhibiting attendance right now is the risk of lockdowns and cancellations

Among the list of barriers, the top factor selected by SA audiences was the risk of lockdowns and cancelled events (33%) – which is also the top factor in all other states/territories.

Restrictions and COVID-safe arrangements are also limiting attendance, with some audiences indicating that there are not as many options available (20%) or that events are booking out too quickly (13%). Another respondent said,

‘I’m not confident in booking an interstate show (accommodation and flights) with the risk of cancellation. It’s harder also to book good seats with reduced capacity, even during pre-sale times.’

SA audience members are the most likely to select financial reasons (16%) as a key barrier preventing them from attending as they did in the past, along with those in QLD (15%). As one person shared,

‘Both my husband and I have become unemployed at this time, if this changes our budget will allow us to return to our normal frequency.’

## 2 in 5 SA attendees are spending over \$100 on tickets — though overall spending is unlikely to fully recover this year

One-fifth (22%) of SA audiences attending in the past fortnight said they spent between \$50 and \$100 on tickets, and 39% spent more than \$100. This represents a significant increase on levels seen in September 2020, when 11% spent more than \$50 and 9% spent more than \$100.

However, over the next 12 months, 28% of SA audiences say they expect their overall spending on arts and culture tickets, admissions, subscriptions and memberships to be lower than before the pandemic started.

This rate has increased from September 2020, when the proportion who said they expect to spend less was 17%, confirming that it will take time to fully rebuild the market for live experiences.

## Comfort levels

### SA audiences are growing more comfortable attending a range of venue types

Comfort levels attending most venue types has been consistently high or growing in SA, as restrictions have been moderate and virus cases have remained low relative to other areas. Almost all SA audience members are confident attending museums and galleries (99% are at least somewhat comfortable, stable with 98% in September 2020), community art spaces/studios (98%, up from 93%) and large theatres or concert halls (93%, up from 79%).

Comfort has also increased for venues that SA audiences have been more cautious of in the past, including stadiums or arenas (82%, up from 67%) and comedy clubs or live music venues (62%, up from 41%).

A larger proportion of SA audience members now also feel comfortable with hands-on exhibitions at an interactive museum (63%), a rate that has seen the lowest levels of comfort since July 2020 (40%) and September 2020 (42%).

### Seating capacity inside venues is a concern for some audience members

While a majority of SA audiences now feel comfortable attending most indoor venue types, limits on attendance numbers are an important factor.

Capacity limits affect the viability of operation, but from an audience perspective, reduced seating capacities appear to encourage people's perceptions of safety, for instance:

- Almost all SA audiences (97%) feel at least somewhat comfortable at 50% seating capacity
- Most people (90%) feel comfortable with 75% seating capacity
- Around half (51%) feel comfortable with 100% seating capacity inside venues.

As some still feel uncomfortable at venues with full capacity, there may be a case for some large venues, festivals and arts centres to voluntarily impose capacity limits for certain events, as it would allow them to be accessible to a larger proportion of audience members.

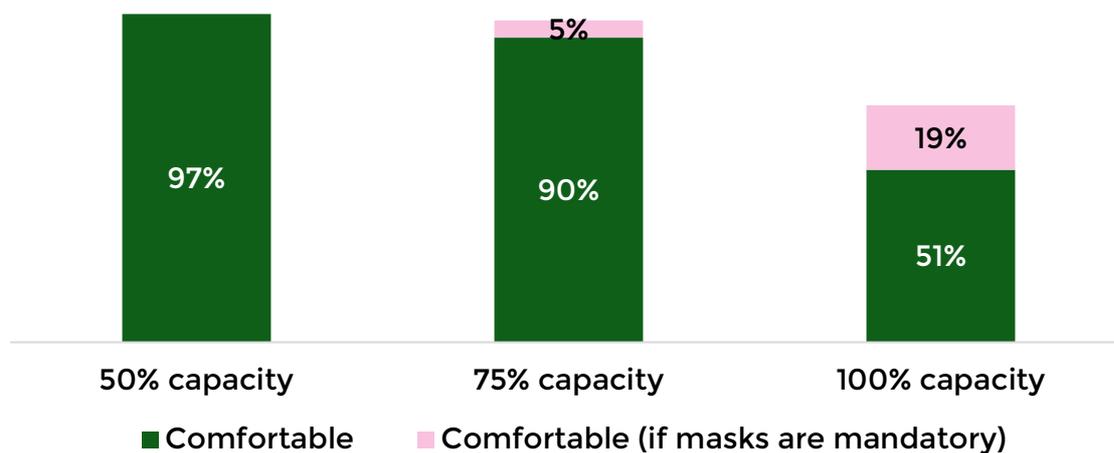
## More people are comfortable to attend if masks are mandatory, though some prefer activities that don't require them

Those who said they were not comfortable at venues were asked whether their answer would change if mask-wearing was mandatory.

At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (14% would be very comfortable and 46% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 90% to 95%.

At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (6% would be very comfortable and 37% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 51% to 70%.

Figure 4: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) (SA) n=1,350



One SA respondent said,

'I think wearing of masks, use of hand sanitiser and appropriate distancing are still very important & necessary, especially given the slow rollout of vaccinations, approaching cooler weather/winter and the new strains of COVID-19.'

However, some shared that they are discouraged from attending events that have mandatory mask policies, as one said,

‘When there is a requirement to wear a face mask I am likely to not attend as I find wearing a mask unpleasant.’

## Comfort with square-metre regulations has increased, but some don’t see any benefit

In March 2021, the proportion of SA audience members who feel comfortable with square-metre policies is stable or higher compared to September 2020. Most are at least somewhat comfortable with 2 square metres (93%, up from 86%) and 4 square metres (97%, stable) of space for each person.

Comments from audience member reveal that comfort is only improved when social distancing can be properly enforced. One SA respondent who recently attended a live performance shared,

‘Seating was excellent with spare seat between all audience. But no control on exiting venue with no physical distancing. Suggest audience is asked to leave by row or similar that is controlled by ushers.’

The proportion who are now comfortable with no social distancing guidelines has increased in SA from 15% in September 2020 to 38% in March 2021. SA audiences are showing higher comfort levels with no social distancing guidelines at venues, compared to audiences in VIC (28%) and NSW (30%), where comfort is generally lower.

## Creative approaches to seating can help more people feel comfortable and engaged

One of the common themes in audiences’ responses about recent events is social distancing and the way it presents a challenge for creating a quality atmosphere.

Some SA respondents are showing appeal for events with ‘pods’ or tables of 4–6 people (17%) where they can sit close to people in their immediate social circle. For instance, one SA respondent shared,

‘I like being with the group I am attending with. I went to a Summer Sounds event and the pod style for live music worked great.’



However, this model doesn't work for everyone and an outdoor amphitheatre with fixed seating in rows ranked higher (34%) as an option among SA respondents. Some commented,

'I like the pods idea, but if I couldn't find 4-6 people to go with me I may not buy tickets at all.'

'As I would likely be attending alone, [the pods option] could force me to be with a group of strangers, which would not be comfortable either socially, or from a COVID perspective.'

## Comfort is highest at outdoor venues, which may impact attendance during the colder months

To feel reassured about safety regulations, the most common topics SA audiences are interested in hearing about are check-in procedures for contact tracing (56%), social distancing requirements (51%) and the disinfection of public spaces (50%). One SA respondent shared,

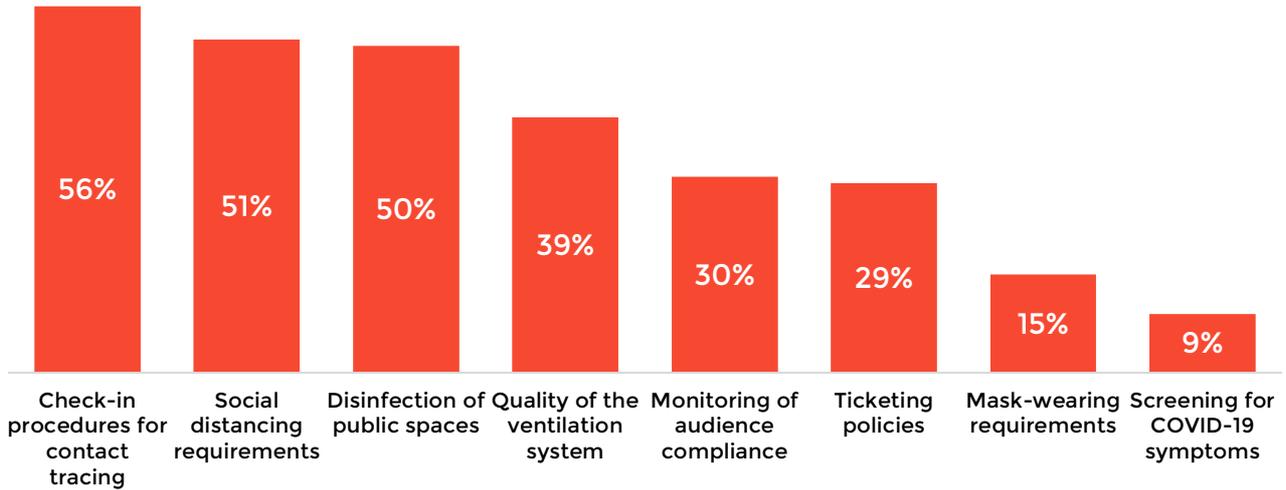
'Be up front about what THEY are doing, rather than focussing on what WE should be doing. [Some events] ONLY focussed on us doing the basics and didn't even mention reduced venue capacities, checking in at each venue, showing check-in before entry etc.'

As winter approaches, some people are expressing concern about the weather affecting outdoor events, as well as the potential for transmission of the virus in indoor venues. Many SA audience members (49%) said information about ventilation and air circulation is important in communication about venue safety. One person suggested, 'the number of people at the event and if it is a closed in space or open air.'

As mask-wearing policies have been less prevalent in SA, audiences are less interested in receiving information about this topic (15%), compared to those in NSW (40%) and VIC (40%), for example.



Figure 5: In thinking about attending cultural venues and events, which of the following topics are most important to you? (select up to three) (SA) n=1,404



## COVID-19 safety

### There is a range of views about public health policies in SA

Qualitative comments from SA audience members reveal views right across the spectrum.

Some SA audience members expressed that while SA has had a generally low number of virus cases, they are conscious about others' complacency. This has been mentioned in relation to both venue staff and other attendees. One audience member shared, 'We are lucky to have had few COVID-19 cases. Easy to become complacent. Good to be reminded of COVID-safe measures.'

Another shared,

'There seems to be some sort of myopia amongst event attendees in that they either don't see, don't comprehend or completely ignore signs relating to social distancing.'

Others say that some safety measures are deterring them from attending events, as one commented,

'I don't want to sit through an event wearing a mask...from that respect I'd rather wait until the risk of transmissions was low enough that they are not required.'

## Most SA audiences expressed satisfaction with COVID safety at cultural venues and events recently

When recent attendees were asked how satisfied they are with audience safety at the venue(s) they attended, the vast majority are satisfied. For example, one SA attendee shared,

'Speaking of the Adelaide Festival events that I have attended – they are doing a terrific job.'

Looking at specific aspects of COVID-safety plans, there are some slight differences relevant to different venue types. For instance, on average:

- ▶ At cinemas, communication of COVID safe measures were rated least well and limits on capacity had the highest satisfaction
- ▶ At live shows and performances, physical distancing measures rated least well, while presence of check-in procedures had the highest satisfaction
- ▶ At fairs and festivals, physical distancing measures rated below other measures.

## Staff and signage continue to be important ways to reassure audiences

Audiences who feel cautious about attending continue to make suggestions for improving communication of COVID-safe arrangements, and in particular, signage and written instructions. One SA audience member commented,

'Greater presence of signage after the venue has been cleaned. For example, at the entrance of each cinema, a sign could say: 'This cinema just been cleaned after the last session, it has been maintained to prevent the spread of COVID-19.'

Audiences generally appreciate clear instructions from staff and some believe there is a case for a stronger commitment of staff to regulate COVID-safe procedures, as one shared,

'Often signage is in place but sometimes measures are not enforced or monitored to the extent I'd expect.'

## The combination of capacity limits, social distancing and mask-wearing is confusing for some — and can affect confidence

With mask policies, seating arrangements, capacity and social distancing all affecting people's choices to attend events, the situation in all states and territories is complex.

It is important to clearly communicate what these policies mean, with some sharing their confusion at how capacity and distancing rules are applied in practice. Some mentioned contradictions with attendance policies, for instance, one person explained,

'There are many inconsistencies in the application of requirements for distancing/mask wearing etc. among organisations and venues...

...The 75% capacity carrying with it the imposition of mask wearing is a strong disincentive to attend performances, particularly when the original booking was under 50% capacity conditions with tolerable distancing requirements.'

### Longer-term outlook

## 93% of SA audiences say they are likely to get vaccinated, which is likely to further improve confidence

The commencement of Australia's vaccination program is already contributing to confidence levels and the outlook is positive. The majority of respondents (93%) said they are likely to get vaccinated for COVID-19 and most do not have major concerns about issues, like the effectiveness of the vaccine.

Looking ahead, 9 in 10 SA respondents (89%) feel confident that the vaccination effort will lead to the resumption of normal activities within 12 months. Around 8 in 10 (79%) say that long-term, they expect to attend events just as they used to in the past.

## Support and fundraising

### SA audiences remain strongly committed to supporting the arts

The proportion of SA audiences who said they feel strongly committed to supporting arts and cultural organisations has grown from 31% to 38% since May 2020.

More SA audience members say that they are likely to purchase a subscription or membership to a cultural organisation (60%, up from 51% in May 2020).

Likelihood to show other methods of support has remained consistent among SA audiences, such as making a donation to an artist or organisation (63%, stable with 65%) or donating to a general sector support fund (47%, stable with 48%).

### 2 in 5 SA audience members are subscribing or purchasing memberships in 2021

In March 2021, 39% of SA audience members said they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season. This is slightly smaller than the proportion who reported having subscribed to last year's season (43% were subscribed in September 2020).

Among those who have purchased, 89% said they are planning to renew their subscription/membership next year (up from 77%, who in September 2020 said they were planning to renew).

A majority of SA audiences are subscribing to a performing arts organisations (28%), while smaller proportions purchased a museum or gallery pass (13%) or a subscription to another type of organisation (7%).

### Donating to artists and cultural organisations is stable — and there is desire to support those that are struggling

The proportion of SA audiences making donations to artists or cultural organisations in the 2020/21 financial year (25%) is comparable to 2019/20 financial year (23%).

When asked what specifically prompted their donation, several SA respondents explained that they wanted to support artists and organisations that were struggling as a result of the pandemic. One person shared,



‘I want the organisation to remain viable. It was not possible to hold performances in 2020, which had a significant financial impact. I donated slightly more than I would have spent on tickets.’

## Online participation

### 2 in 5 SA audiences are participating online, and many plan to continue

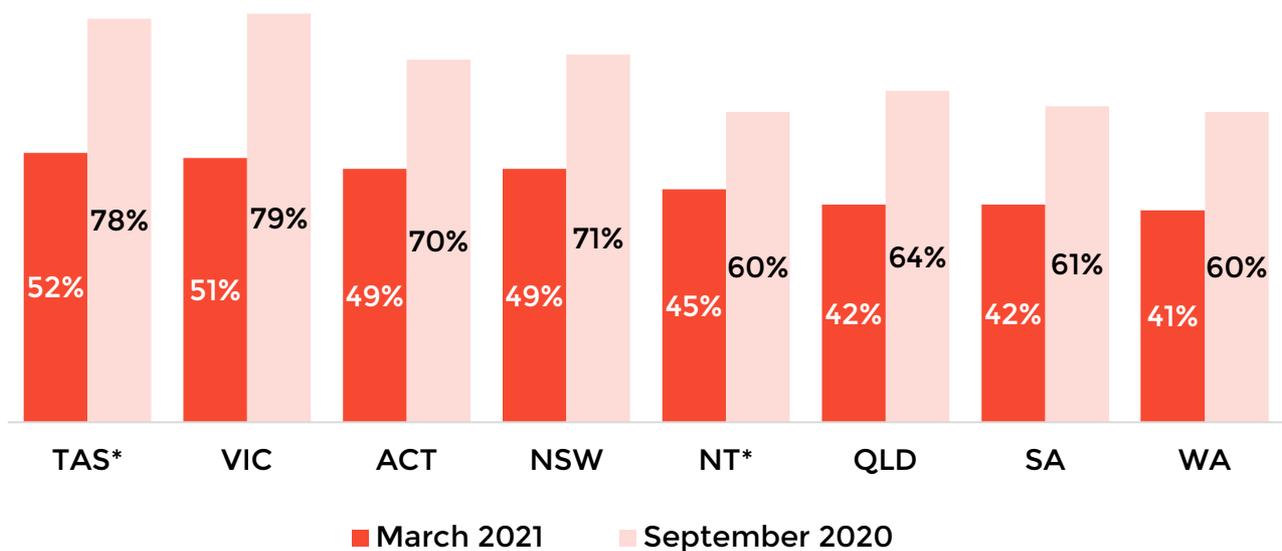
As opportunities for live attendance have continued to expand in SA, fewer audience members say they recently participated in digital arts and culture experiences (42% in March 2021, down from 61% in September 2020).

Compared to other jurisdictions, SA audiences are among the least engaged online nationally, along with those in WA (41%) and QLD (42%). In comparison, online participation is higher in VIC (51%), NSW (49%) and the ACT (49%).

Among the 42% SA audiences participating online, a sizeable proportion say they are doing so more frequently than before the pandemic (45%) and almost three-quarters of those plan to continue when it ends (72%).

A smaller proportion (19%) say they’re participating online less frequently, or are currently participating more, but plan not to continue post-pandemic (28%).

Figure 6: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) n=13,836



## Video content remains key, but online courses are becoming relatively more popular

Video content of performances and events remains the most popular form of digital participation, with 22% of SA audiences recently watching pre-recorded video of a performance (down from 40% in September 2020) and 22% recently watching a live stream (down from 30%).

However, online classes and tutorials have had the smallest decreases in attendance and are now a comparatively common way that SA audiences are choosing to participate online (15%), confirming an opportunity area for potential exploration and investment by SA organisations. As one respondent shared,

‘I am learning hula hooping online as there are no teachers in SA teaching what I'd like to learn.’

## Increasingly, SA audiences are motivated to access experiences they can't attend in-person

When asked about their motivations for participating online, data collected in the early stages of the pandemic (May 2020), indicated that most SA audiences were driven to support an artist/organisation they think is important (35%) or for their own mental wellbeing (34%).

Now, the most common reasons given are seeing something you had wanted to see live (44%) and seeing something you wouldn't normally be able to see (38%).

A significant proportion are still motivated to go online to support an artist or organisation they think is important (26%) and some are still going online for their wellbeing (15%). A consistent proportion of SA audiences are motivated to find out more about an artist or creative work by participating online (18%, stable with 17% in May 2020).

## As with audiences nationally, some people want less 'screen time' — while others are unaware of digital options

Since this study first measured the barriers to online participation in May 2020, the proportion of SA audiences who say they are 'not interested in online or digital arts experiences' has risen from 18% to 29%. SA audiences, along with those in WA (29%), are the most likely to hold this sentiment.



The qualitative data shows that some audience members are eager to focus on live attendance opportunities, as one said,

‘I am working from home so most of my day is spent in the digital world. It means don't want to be in the digital space in my down-time. I want to enjoy things in real life.’

However, others aren't aware about digital offerings, as one person shared,

‘Maybe I am out of touch, but there doesn't seem to have been much offered. For example I would have liked to watch *Midsummer Night's Dream* from the Adelaide Festival (currently showing) but it does not appear to be offered digitally.’

There may be opportunities to improve marketing and communications about digital experiences, to grow engagement with different audience segments in SA.

## 1 in 3 SA audience members participating online continue to pay for digital experiences

The proportion of online audiences in SA that are paying for digital content has increased in March 2021 (35%), since September 2020 (29%). Though SA audiences are less likely to be paying for digital experiences, compared to other jurisdictions, such as NSW (42%), the ACT (42%) and VIC (39%).

The types of payment for digital experiences are changing slightly. Pay-per-view remains the most common form of digital patronage, and has increased since September 2020 (20%, up from 14%). A small number (4%) say they subscribed to a platform to access content on-demand and 5% say they accessed digital content as a part of a program or season they subscribed to.

However, the proportion of SA users reported having made a donation for something they consumed online has remained consistent (14%, stable with 16% in September 2020). One SA user shared,

‘I donated while watching free live-streamed event. Concern for loss of income for artists and others who work in the sector.’



## **Making content available on-demand is appealing for most audiences – and many want to hear artists talking about their work**

Designing digital experiences is complex and there are audiences for different types of experiences, though some features appear more popular than others.

Respondents were provided with a list of seven potential features of digital arts experiences, and asked to select the top two most appealing to them.

The ability to access something on-demand was the most popular choice for SA audiences (59%) and ranked higher than seeing something live that is happening right now (39%). Another popular feature among SA audiences was hearing the artist or artistic leader talk about their work (38%).

Accessing short, edited segments or taster experiences was in the top two features for 14% of SA audiences, and 13% said they would like tips on how to improve their own skills or appreciation of an artform. Smaller numbers preferred connecting with other audience members during the experience (6%) or contributing to the experience themselves in some way (4%).

---

## What's next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study's Australian homepage at:

[www.thepatternmakers.com.au/covid19](http://www.thepatternmakers.com.au/covid19)

There, you can read about the story so far and access a dynamic dashboard, to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

If you have a question, or an idea to put forward, relating to this study, you can contact [info@thepatternmakers.com.au](mailto:info@thepatternmakers.com.au).

## Acknowledgment

Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land - Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present and emerging.



Made possible with support from

