



PATTERNMAKERS



NOVEMBER 2021

South Australia Snapshot

Audience Outlook Monitor



Government of South Australia
Department of the Premier
and Cabinet

Executive Summary

Most SA audiences continue to attend cultural events, but some are apprehensive in light of changing conditions

- ▶ Data from 938 past attendees of South Australian (SA) arts organisations suggests that confidence levels will be changing rapidly as we approach the end of 2021.
- ▶ Around 2 in 3 SA audience members (66%) are currently attending cultural events, and 3 in 4 (77%) recently made firm plans to attend a cultural event in the future.
- ▶ However, these forward plans are more likely to be concentrated in the short-term, and many audience members are conscious that relaxed border restrictions could lead to a rise in cases.
- ▶ While the outbreak-affected states of NSW, ACT, and VIC have had more time to grow used to 'living with the virus', SA audiences are somewhat anxious about the prospect of widespread community circulation – and news of new variants could challenge confidence.
- ▶ SA arts audiences are getting vaccinated at a faster rate than the state-wide population, reaching 88% fully vaccinated in November – and 1% already receiving booster shots.
- ▶ When SA audiences are presented with a 'COVID-normal' scenario of 90%+ vaccination coverage and open borders, they indicate that comfort levels could fall for venues like museums and galleries (-18%) and seated outdoor events (-15%). However, their comfort will increase for venues that many audience members were previously not comfortable to attend, such as comedy clubs and live music venues (+5%).

COVID-safety will be critical for maintaining confidence as SA opens its borders

- ▶ Compared to the mid-year results, SA audiences are less likely to be inhibited from attending cultural events in future by the risk of lockdowns (38%, down from 46% in July) and more likely to be concerned with risks of transmission (48%, up from 26%).
- ▶ The results confirm that COVID-safety measures will play a pivotal role in stabilising confidence as SA opens its borders and Australia faces the prospect of new variants.
- ▶ Most arts audiences are likely to be in favour of proof of vaccination policies – with 70% in SA encouraged by this measure and only 13% discouraged.
- ▶ In fact, some audiences say these measures would absolutely need to be in place for them to consider attending. Almost half of surveyed SA audiences won't attend

cultural spaces unless proof of vaccination is required, including large theatres and concert halls (49%) and outdoor events (44%).

- ▶ Mask-wearing also continues to be encouraging, with 2 in 3 (59%) encouraged by requiring audiences aged 12 years and over to wear masks, and 48% of SA audiences would need mask mandates to be in place to attend a large theatre or concert hall.

Audiences are ‘looking local’ to support the recovery effort – with events close to home seen as a low-risk way to enjoy the arts

- ▶ The outlook for loyalty programs is mixed, with more than 1 in 3 (36%) indicating they are at least somewhat likely to purchase a subscription or membership in 2022. Around half (47%) say they are unlikely – with some citing the uncertainty of reopening and planning for events.
- ▶ As people weigh up the risks of attending, 79% of SA audiences agree that they’ll be attracted to events in their local area over the next year.
- ▶ An increasing number of audiences say they will be interested in ‘light-hearted programs’ (46%, up from 37% in July) – with some seeking escapism and uplift after the cumulative impacts of the pandemic.

Digital participation is on the rise again, and SA audiences are increasingly likely to see online arts playing a long-term role in their lives

- ▶ After several quarters of small declines in online participation rates, digital engagement has increased slightly for SA audiences – from 38% in July to 42% in November.
- ▶ Despite some reports of ‘screen fatigue’, overall SA audiences are now more likely to see an ongoing role for digital arts experiences in their lives (68%) compared to July 2021 (49%).
- ▶ Audiences can be divided into three groups for the purposes of marketing digital arts experiences: ‘digital devotees,’ the 20% of audiences who see a substantial role for digital in their lives, ‘selective but supportive’ audiences, the 48% who see a small role, and ‘tired of tech’ audiences, the 32% of audiences who see no role at all outside of lockdown.
- ▶ Many audiences support hybrid models that offer greater flexibility and accessibility as we transition to a ‘COVID-normal’ Australia. When asked if they would attend a digital program in place of a cancelled live event, 28% of SA audiences said they would be likely to attend.
- ▶ It is clear that digital marketing and online experiences are playing a key role in keeping audiences engaged with arts organisations as uncertainty continues.

Introduction

This report summarises insights from over 900 audience members in South Australia

This South Australia (SA) Snapshot Report outlines key findings from the November 2021 phase of the Audience Outlook Monitor in Australia (Phase 6), based on data collected from 938 audience members connected with cultural organisations in South Australia.

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 over 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 3 November 2021, participating organisations simultaneously sent the Phase 6 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. This data provides excellent visibility of trends across the country, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes.

This report compares new results with data collected previously in July 2021 (Phase 5) and October 2021 (Pulse Check), to examine how things are changing over time.

In addition to this Snapshot Report, the November 2021 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19.

Audiences in outbreak-affected states/territories are reported separately to the rest of Australia

At the time of data collection (3–7 November 2021), outbreak conditions varied significantly by jurisdiction: New South Wales (NSW), Victoria (VIC) and Australian Capital Territory (ACT) were transitioning out of extended lockdowns, while in the rest of the country, audiences were enjoying minimal restrictions.

The three outbreak-affected states/territories of NSW, VIC and ACT (referred to in this report as ‘**outbreak-affected states**’) share similar trends – and are grouped together, where relevant, for reporting purposes. However, it should be noted that ACT audiences tend to be slightly less tolerant of risks than audiences in NSW and VIC.

States/territories across the ‘rest of Australia/rest of the country’ – South Australia, Queensland (QLD), Western Australia (WA), NT and TAS – also share many similarities, with border closures helping to suppress the virus and minimise risks for audiences. These jurisdictions are also grouped together in places – noting that confidence levels in WA tend to be higher than in SA and QLD, where border restrictions were beginning to lift at the time of publication.

Read on for the key November 2021 findings in SA.

Current conditions

Vaccination rates in SA are slightly lower than other states, but are climbing steadily and should reach 95% of arts audiences

As of 7 November 2021, 88% of SA arts audiences say they are now fully vaccinated (stable with 86% of SA audiences in October) with another 5% partially vaccinated (down from 10%). Among those fully vaccinated, 1% have had a booster shot.

The proportion fully vaccinated has increased significantly since July 2021, when 23% of audiences were fully vaccinated and 49% had received their first dose.

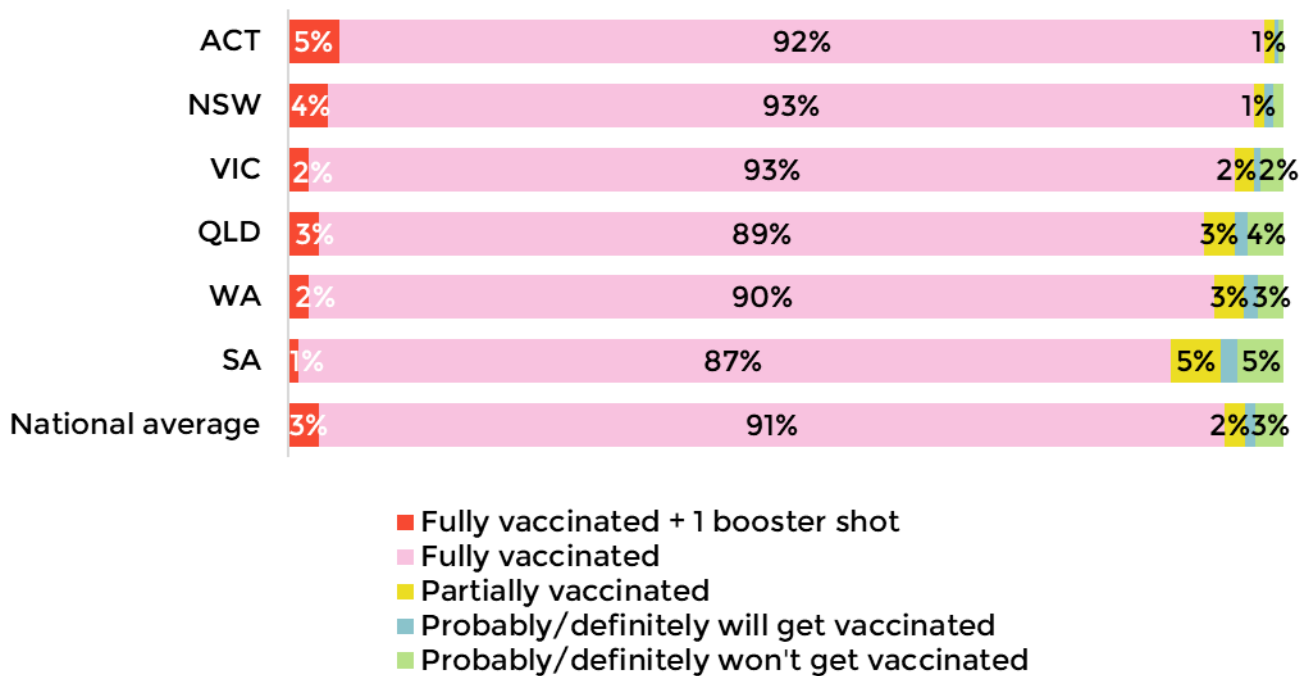
SA arts audiences continue to take up opportunities to be vaccinated faster than the state-wide population – with the state-wide proportion fully vaccinated just over 80% at the time of this report’s publication.

Of the 7% of SA audiences who are not vaccinated, 2% say they probably or definitely will get vaccinated, suggesting that vaccine supply issues have now largely been addressed for those audiences participating in the study. Around 5% say they will probably or definitely not get the COVID-19 vaccine.

Vaccination rates vary by state, with uptake in SA being slightly lower than other states not currently affected by major outbreaks, such as QLD (92% fully vaccinated) and WA (92% fully vaccinated). SA is the lowest of any state nationally right now (compared to a national average of 94%) – as shown in Figure 1.

Vaccination rates increase with age, with 99% of SA audiences aged 75+ fully vaccinated, compared to 79% of audiences aged between 35 and 54 and 72% of audiences under 35 fully vaccinated.

Figure 1: Proportion of audiences who are vaccinated November 2021, by state/territory (n=7,484)



Despite slightly slower vaccine uptake, most SA audiences are optimistic that vaccination will help normal activities to resume

Compared to July 2021, SA audiences are more confident that the vaccination effort will allow normal activities to resume within a year. 1 in 3 (33%, up from 27% in July) are very confident in the vaccine effort, and only 11% (stable with 13%) are not at all confident.

However, confidence in the success of the vaccination program tends to be lower than in the outbreak-affected states of NSW (47% very confident), VIC (45% very confident) and the ACT (45% very confident) – where vaccine rates are higher and audiences have had longer to acclimatise to the idea of a ‘COVID-normal’ world.

In SA, which has seen contained outbreaks of a shorter duration, audiences are among the least confident – particularly where the opening of borders is concerned. One audience member said,

‘I can't be fully confident until we have hit vaccine targets and reduced some of the vaccine hesitancy. And seen the effect that opening borders will have. I am hopeful though.’



Audience comfort in SA is slightly lower than pre-Delta levels, and changing conditions may have an impact

Audience comfort in SA is in something of a state of flux right now. Although audiences mostly feel ‘ready to attend’ right now (63%), confidence has fallen slightly over the past few months and remains below pre-Delta levels (down from 73% in March) – as shown in Figure 2. Readiness to attend is slightly behind similar states, such as QLD.

SA audience confidence is likely to be further impacted by risk factors such as the opening of interstate and international borders, and the prospect of new variants.

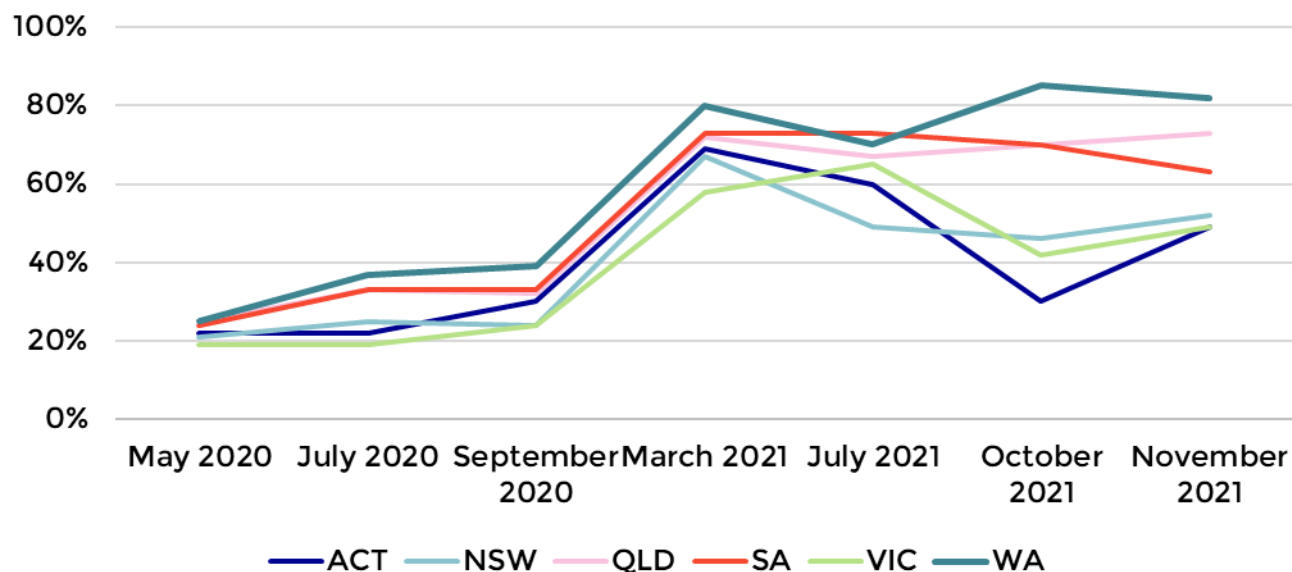
However, with SA passing its first reopening milestone and opening its borders to fully vaccinated travellers, subject to [a negative PCR test](#), on 23 November, audience comfort may continue to waver. One SA audience member said,

‘Currently there is no community transmission in SA – once borders open, that will probably change. Will be less comfortable than now going out.’

Another said,

‘I’ve finally felt comfortable to visit exhibitions and see shows over the past few months. If interstate borders open while there is still community transmission, I’ll be staying away from public events again, at least until my toddler can be safely vaccinated and our vax percentages are high and include children.’

Figure 2: Proportion of audiences who are ‘ready to attend now or as soon as permitted’, by state/territory, May 2020 to November 2021 (n=7,637)



SA audiences are equally, if not more, comfortable with arts attendance than other public activities

Right now, SA audiences are equally, if not more, likely to be 'very comfortable' with arts attendance than with many other public activities.

The majority of SA audience members would feel very comfortable attending an outdoor event with fixed seating (80%), visiting a museum or gallery (76%), a community art space or studio (64%) and a large theatre or concert hall (57%). There are only a few venues where less than two-thirds of audience members feel very comfortable attending: outdoor events without fixed seating (51%), a comedy club or live music venue (27%) and hands on exhibits at an interactive museum (24%).

By contrast, while most SA audience members feel very comfortable eating at a local restaurant or bar (80%) or going to a local cinema (66%), half or less are very comfortable attending a sporting match (51%), exercising at a gym (48%) or using public transport (43%). Even smaller numbers feel very comfortable flying domestically on a commercial airline (28%).

Live attendance

Most SA audience members are making short-term plans and some feel uncertain about the future

When asked about their attendance behaviours in the fortnight before data collection, 66% of SA audiences reported they had attended an in-person arts or cultural event. This proportion is lower than pre-Delta levels, with 79% of SA audiences attending in March.

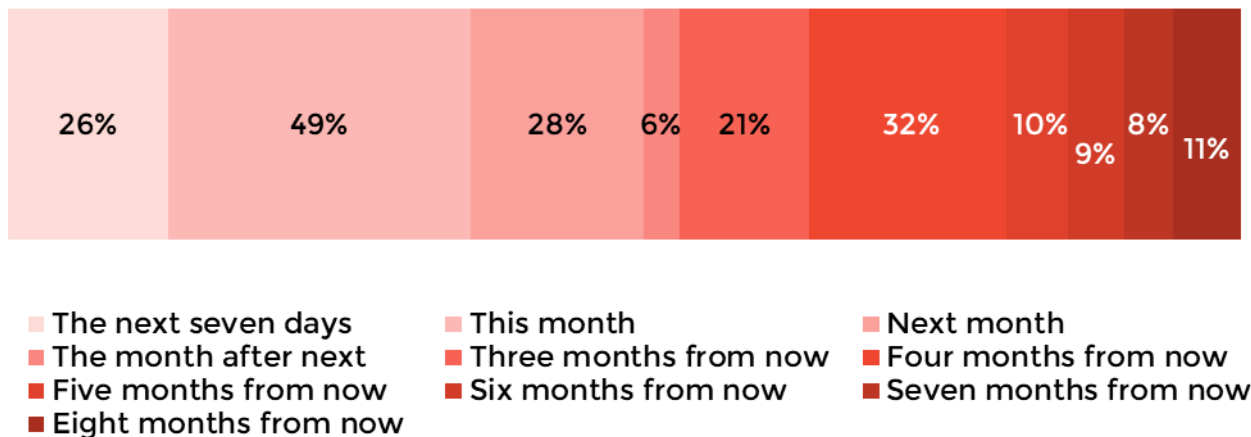
Around 3 in 4 (77%) SA audiences reported making plans for in-person attendance in the future. However, most of these plans appear to be concentrated in the short term, with most respondents booking for events in the week (26%) or month (49%) ahead, or in December (28%). One said,

'I'm hesitant to book more expensive events or lengthy trips interstate with the risk of lockdowns and general uncertainty due to COVID when trying to plan, so I prefer to have a last-minute option to attend something.'

Relatively fewer bookings are made in the long term - which may reflect the availability of events, but could also suggest that audiences are more uncertain about attendance in the far future. Compared to the earlier months, smaller proportions of SA audiences are booking for May (10%), June (9%) or July (8%).



Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? SA audiences (n=342).



Audiences are increasingly cautious about the risk of transmitting the virus or being a close contact and needing to isolate

When asked what would prevent them from attending arts and cultural events in the next year, SA audiences were most likely to name the risk of contracting or transmitting the virus as their primary concern (48%) – a rate that has almost doubled since July (26%).

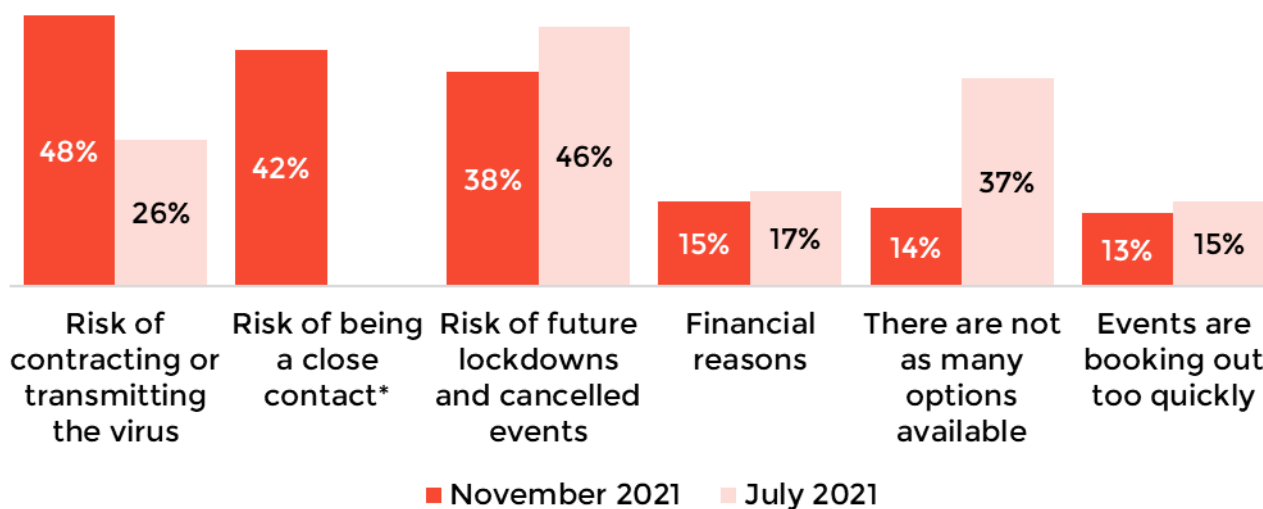
Given that the prospect of attending events while cases are active in the community is relatively new to SA audiences compared to those in NSW, VIC and ACT, audiences are understandably wary about the risks arising from virus circulation.

Another 2 in 5 SA audience members (42%) were concerned with the risk of being a close contact and needing to isolate. One audience member shared,

‘I used to fly interstate regularly to attend events, but I’m not currently feeling comfortable to do this given uncertainty around changing quarantine/isolation rules and not being sure what to expect with air travel anymore...’

While still a major barrier to attendance, the risk of lockdowns and cancelled events has decreased in importance since July (38% in November, down from 46% in July). Audiences were also much less likely to report being prevented from attending because there were ‘not as many options available’– only 14% of audiences, down from 37% in July.

Figure 4: Proportion of SA audiences who say these factors will preventing them from attending in-person arts and culture events as they used to in the past. SA audiences, July 2021 (n=874) and November 2021 (n=934)



*Option introduced in Phase 6 – no historical comparison available

Outlook for comfort levels

Conditions in SA are changing rapidly, and will continue to do so over the next few months, as borders open and Australia faces the prospect of new variants. To understand how readiness to attend may change, audiences were asked to consider a hypothetical **'COVID-normal' scenario** for attending events in which the following conditions were in place:

- ▶ interstate and international borders are open
- ▶ at least 90% of the population over 12 is vaccinated
- ▶ proof of vaccination or a negative test result is required at entry
- ▶ seated venues are operating at 100% capacity

Reaching 'COVID-normal' will improve comfort at key venues, assuming venues require proof of vaccination or a negative test

Responses to the 'COVID-normal' scenario were mixed, with high vaccine coverage competing with risk factors such as the opening of borders and removal of capacity limits.

On the one hand, many audience members anticipate that a scenario like this would see SA exposed to unprecedented levels of the virus, with one saying,

‘We've been living pretty much COVID free in SA. I am a bit scared of what's going to happen once the borders reopen and we have the virus in the community (me and my family are fully vaccinated).’

Others, however, felt that the hypothetical 90%+ vaccination rate, which is significantly higher than the state-wide rate, would give them the confidence to attend. One said,

‘Vaccination/test proof and 90% vaccination levels would lead to complete confidence for me.’

Another said,

‘I think there is always a risk of getting COVID-19, even when vaccinated, but when the majority of people are vaccinated and proof of vaccination is displayed by patrons, then it fills me with a lot of confidence.’

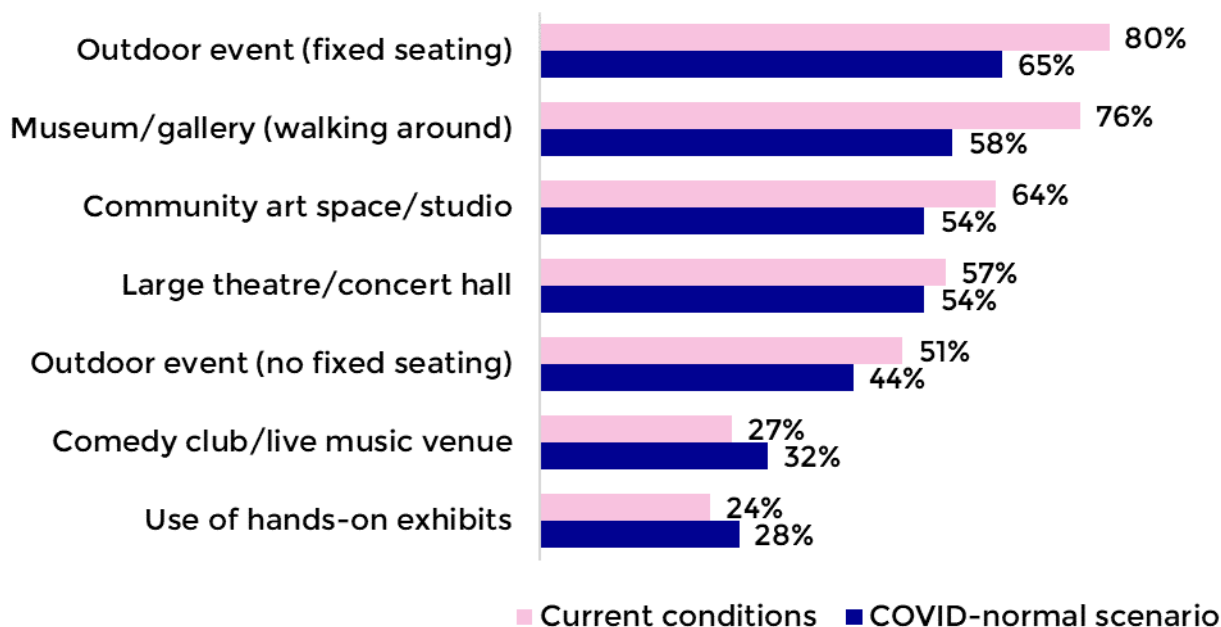
Even with safety measures in place, some attendees would still feel uncomfortable while high case numbers exist in other states. Some respondents said they would take extra precautions, as one said,

‘Once the borders open to eastern states I feel we'll be at a greater risk, so personally will continue with safety measures, even if they are eased.’

On average, comfort decreased for the majority of venues like museums/galleries (-18% very comfortable) and outdoor events with fixed seating (-15%), with smaller decreases in comfort seen at large theatres and concert halls (-3%) and outdoor events without fixed seating (-7%).

In contrast, comfort increased for low-comfort venues such as comedy clubs and live music venues (+5%) and hands-on exhibits (+4%). This data suggests that reaching COVID-normal will be hugely beneficial for SA's contemporary music sector and forms of participation such as participatory and interactive events – assuming venues require either proof of vaccination or a negative test result at entry.

Figure 5: Proportion of audiences in SA who would be 'very comfortable' to attend selected cultural venues in current conditions and COVID-normal scenario. SA audiences, November 2021 (n=930)



Some audience members expressed that they had difficulty imagining how they would feel in this scenario, given that they have not faced high cases of COVID-19 before - and that their behaviour would be contingent on case numbers or the extent of the virus. One SA audience member said,

'I'm not actually sure how I would feel in this scenario. We have been so sheltered and lucky here in SA, I am unsure as to whether I would be happy to continue on as normal or if I would be more hesitant. I think it would depend on case numbers and community transmission.'

Some audience members remain uncertain about how the vaccination effort will proceed in the long term

While high vaccination coverage is an important aspect of this '**COVID-normal scenario**' for most audiences, some are conscious of factors that could complicate the vaccination effort - such as the risk of new variants, breakthrough infections, or complications caused by existing health vulnerabilities. One said,

'People who are vaccinated can carry Delta. The idea that vaccination means 'no problem' is wrong [...] The message has to be: vaccinate for your own protection, follow the rules to minimize viral transfer, but assume it will transfer. And we need rules to apply.'

Another said,

‘I think here in SA we are all concerned about the borders opening to NSW and VIC [and] we have been relatively COVID-free. Knowing that will change once the borders are open, I think everyone will be very nervous about going anywhere. There needs to be strict guidelines.’

Another said,

‘I’m fully vaccinated about to have my 3rd dose. We have to get on with life and personally I can’t be more protected, so have to take the risk.’

COVID-safety

The most widely encouraging COVID-safety measures are check-ins and proof of vaccination

With a degree of uncertainty persisting, it is clear that COVID-safety will be critical for maintaining confidence.

When asked about a list of potential COVID-safety measures at cultural venues, most SA audiences say they would feel encouraged to attend by the majority of safety measures. Their feedback confirms the role of COVID-safety in the recovery process.

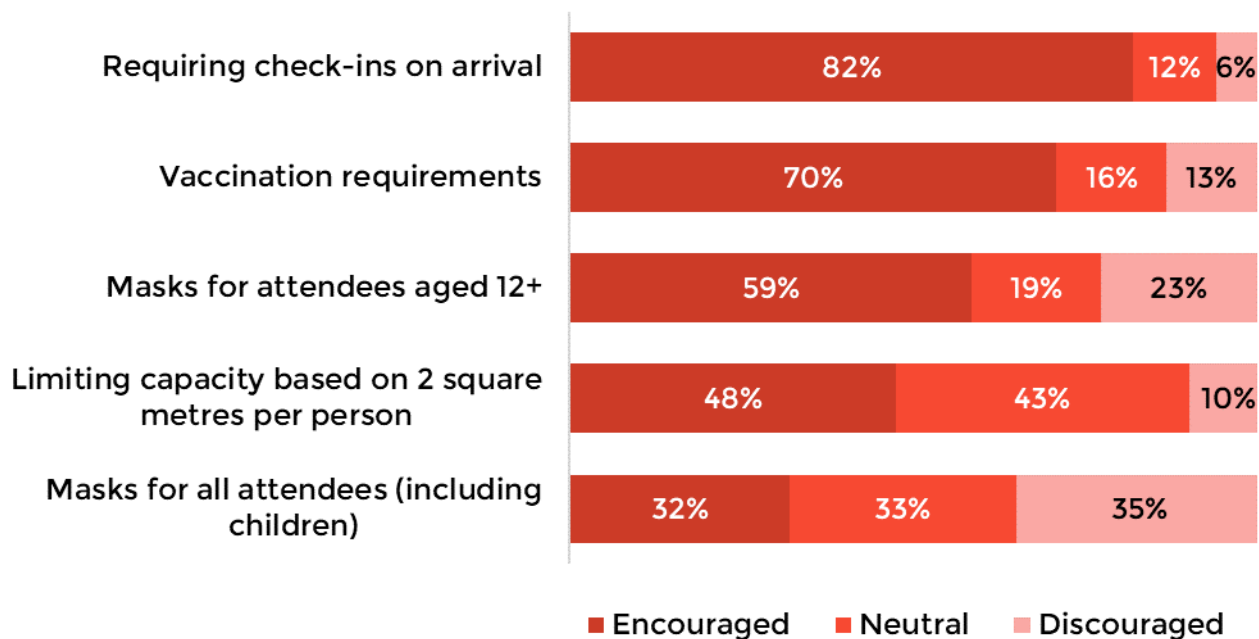
The largest proportion of SA audiences said they would be encouraged by requiring check-ins upon arrival (82%, down from 86% in October) – as shown in Figure 6.

The next most widely encouraging COVID-safety measure was proof of vaccination required at entry (70%). Support for this measure decreased slightly since October, from 73%.

In spite of the debate surrounding vaccine passports, just 13% of audiences say this measure would discourage them from attending – a positive sign considering many independent venues and events are already moving towards proof of vaccination requirements. The proportion discouraged by this measure is higher compared to outbreak-affected states such as VIC (8%), the ACT (6%) and NSW (5%), and most similar to QLD (13%).

SA audiences feel more neutral about social distancing guidelines, with 48% saying they feel encouraged by limiting capacity based on 2 square metres per person and another 43% feeling neutral.

Figure 6: How much would each of the following steps discourage or encourage you to attend? SA audiences, November 2021 (n=923)



SA audiences are mostly in favour of mask mandates, which may help maintain confidence as borders reopen

Significant proportions feel encouraged by mandating face masks for people aged 12 and over (59%, down from 64% in October), while 1 in 4 (23%) would be discouraged.

While some people say that it detracts from their enjoyment of the event – as one said,

‘Apart from a ticketed timed visit to a gallery where you wouldn’t wear a mask for longer than 90 mins, the wearing of a mask is too much of a distraction to enjoy an event. I wear glasses and find that depending on the air-conditioning I can fog up too much to see.’

Many others explained that masks add to their comfort levels. One said,

‘I have been double vaccinated and live in Mount Gambier so when borders are open I shall take the precaution of mask wearing and distancing. I am elderly and feel grateful for the care SA Health has taken in keeping us informed and well.’

Another commented,

‘Masks will be much more important once borders are open - then I believe they should be mandatory (for short to medium term) in certain venues/circumstances, depending on type.’

Mask mandates for children continue to be polarising among SA arts audiences

While the majority of SA audiences would feel encouraged by mask mandates for people aged 12 and over – with some even considering the removal of mask mandates a ‘dealbreaker’ for attendance – when enforced for all children, audiences are polarised.

Around one-third of SA audiences (32%) are encouraged by masks for all ages and a similar proportion (35%) would find masks for children discouraging – the largest proportion discouraged by any COVID-safety measure. One-third (33%) feel neutral about this measure.

The proportion discouraged by masks for all ages has increased from 26% in October.

SA parents were, understandably, the most likely to take issue with this measure, with 55% saying it would discourage them from attending.

Around half of SA audiences won’t attend indoor venues unless proof of vaccination is required at entry

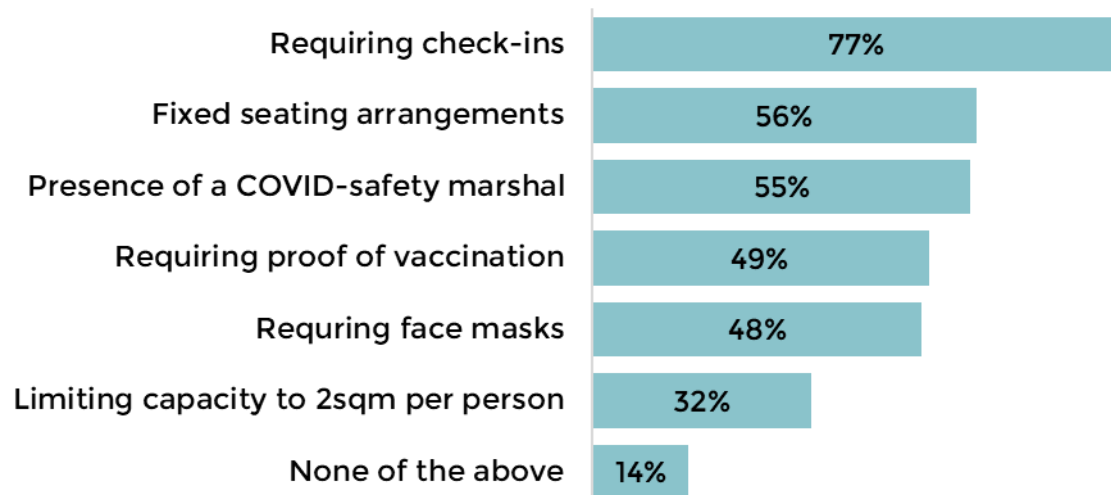
When asked whether any COVID-safety measures absolutely need to be in place to attend a large theatre or concert hall, the largest proportion of SA audiences said requiring check-ins upon arrival (77%) and fixed seating arrangements (56%).

Almost half (49%) of audiences won’t attend without proof of vaccination requirements – and overall, most audiences are likely to be in favour of proof of vaccination policies for cultural venues and events.

This rate may increase if community transmission levels rise in SA. One respondent said they would be inclined to select this option in future, commenting,

‘In the future, when we do have COVID-19 in Adelaide, I would choose ‘Requiring proof of vaccination at entry’ as well. Right now, the risk is so low that it doesn’t matter.’

Figure 7: Would any of the following measures absolutely need to be in place for you to attend an event in a large theatre/concert hall today? (select multiple). SA audiences, November 2021 (n=935)



More than half (55%) would rely on the presence of a COVID-safety marshal to assist with compliance, while another 48% said the requirement to wear a mask would be absolutely necessary for them to attend – and this requirement could bolster confidence in the face of uncertainty over the summer.

Just 13% of audience members say they will need ‘none of the above’ safety measures in place, though many respondents mentioned that this depends on outbreak conditions in SA – and may change as the border reopening progresses. One said,

‘I feel I have a false sense of security in SA at present and worry about what will happen when the borders open. My answers may change in the future.’

SA audiences are more comfortable at outdoor venues, but proof of vaccination is still key for 2 in 5 audience members

Overall, audiences are relying on COVID-safety measures to a slightly lesser extent at outdoor events, with open-air venues alleviating some of the risks associated with virus transmission.

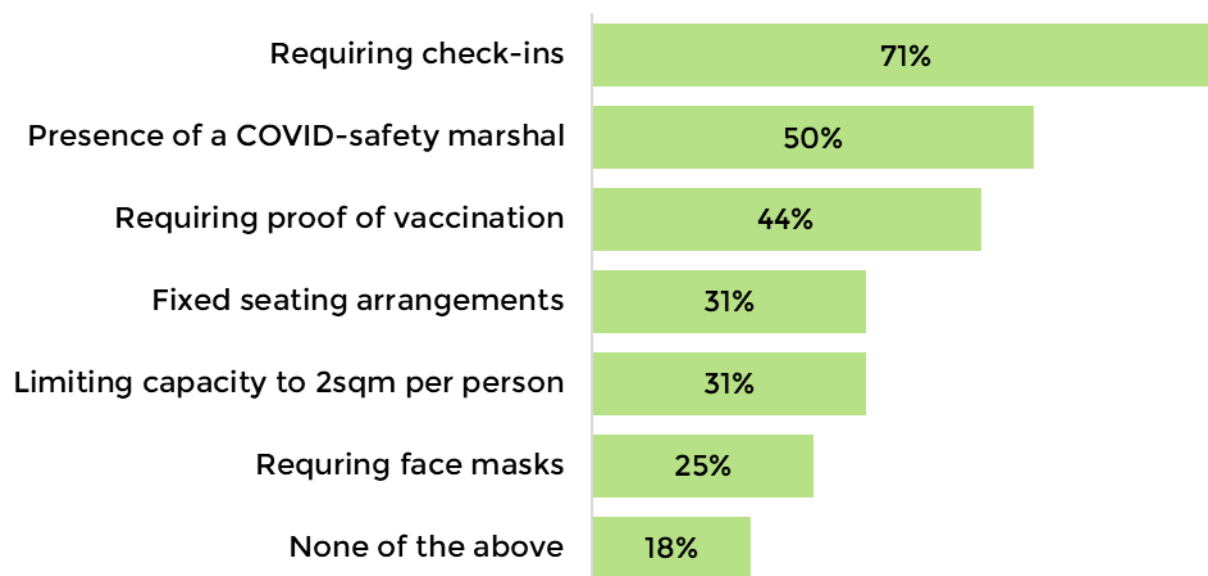
However, the majority of SA audiences still say check-ins (71%) would absolutely need to be in place at outdoor events, with another 44% relying on proof of vaccination.

The presence of a COVID-safety marshal is also seen as absolutely necessary for around half of SA audiences at both large theatres (55%) and outdoor events (50%), signalling that audiences want to see the rules observed at all venue types.

One said,

'I think it's important that we continue to check in to help SA's contact tracing teams in the event of an outbreak. I also think it's important that we have COVID marshals in place to ensure the directions are being followed.'

Figure 8: Would any of the following measures absolutely need to be in place for you to attend an outdoor event today? (select multiple). SA audiences, November 2021 (n=866)



Some other measures were considered less crucial when attending outdoor venues – relative to a large theatre/concert hall – such as requiring face masks (25%, compared to 48% at theatres) and fixed seating (31%, compared to 56%).

Air circulation and the freedom to move around plays a key role for some audiences' decisions, and many perceive outdoor venues to be safer than indoor venues. One SA audience member said,

'I would be more comfortable not wearing a mask to an outdoor event versus an indoor event.'

Some SA audiences see rapid testing as an additional or alternative measure to proof of vaccination

Qualitative data suggests that audiences are starting to see rapid antigen testing as an important complement to COVID-safety measures like proof of vaccination requirements. Some audience members shared their uncertainty on a novel check-in process, as one said,

‘I think it depends on the type of event. I like to attend the State Theatre plays and understand that it is difficult to regulate all of the suggested measures. I have heard that in Europe attendance at theatre is dependent on proof of vaccine or a negative COVID test result within the last 24 hours. This seems like a reasonable request but I'm not sure how readily it can be applied.’

Furthermore, although the proportion of SA audiences who would be discouraged by proof of vaccination requirements is small (13%) some have suggested that in time, proof of a negative test result could be a way of ‘splitting the difference’ and allowing unvaccinated patrons to attend. One SA audience member said,

‘Vaccination or COVID negative test for entry. There are people who have not got vaccinated with reason. I do not want to exclude these people.’

As rapid tests become more widely available, it is likely they can be introduced as an alternative or additional measure, similar to policies in Europe and North America.

However, some audience members are worried about the reliability of rapid antigen tests, and suggest they need to be considered in relation to other measures. One SA audience member said,

‘If attendees can establish RECENT negative test and 90% are vaccinated I would be most comfortable if masks were NOT required.’

Buyer behaviour

8 in 10 audience members will be attracted to events in their local area – with ‘local loyalty’ being a response to pandemic hardship and a way to alleviate risk

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 8 in 10 (79%) SA audience members agreed that they would be looking local – while only 3% disagreed.

Some audience members suggested that restrictions on travel had made them more aware of and connected to arts and culture in their local area, with one SA audience member stating,

‘Local events have come into view more strongly since I am unable to travel interstate.’

A desire to support local acts and venues after a long period of hardship was also a factor, with one SA audience member saying,

‘The arts community has been especially hit by COVID and I would like to be supportive.’

Others say that local events feel ‘safer’ – from both the risks of virus transmission and complications arising from cancellation. As one said, ‘I feel safe in my community.’

More SA audiences are looking for uplifting events – and most say they’re not drawn to works that explore the pandemic just yet

When asked to share their preference for the types of arts and cultural content they would engage with over the next year, the majority of SA audience members said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (90%, down from 93% in July).

Though in the minority, the proportion of audiences who say they will prefer ‘light-hearted programs’ has been steadily increasing since May of last year – with 46% of audiences now agreeing with this statement (compared to 19% in May 2020 and 37% in July 2021).

Some audience members suggested that the cumulative impacts of the pandemic have left them seeking escapism and uplift, with one saying,

‘If going out for enjoyment I would not go to anything with covid focus – want some escapism from today’s problems.’

The proportion of SA audiences likely to seek ‘works that make sense of the pandemic’ remains low (14%, up from 9% in July 2021), with 43% disagreeing that they will be attracted to these kinds of works. When explaining their answers, some expressed ‘pandemic fatigue’ and/or an aversion to didactic works, for example:

‘While the intentions of ‘works that make sense of the pandemic’ might be important, for now I’m seeking entertainment just to shut my brain off for a while. Anything with a heavy social message makes me tired these days.’

Another said,

‘Life is short and hard. Give us some cheerful distraction not soul-searching and navel-gazing. The daily news cycle and political commentary are already depressing enough.’

Consistent with the [Visions for Culture](http://www.thepatternmakers.com.au/visions-for-culture-analysis) (www.thepatternmakers.com.au/visions-for-culture-analysis) in late 2020, this data confirms that many audiences see a role for the arts in the recovery process – and will turn to trusted organisations for connection, joy and healing.

SA audiences want to keep supporting artists, with 1 in 3 likely to purchase a subscription or membership

When asked whether they were going to purchase a subscription or membership to an arts organisation in 2022, around one-third (36%) of SA audiences said they were likely, pointing to an opportunity area for further investigation.

Some audiences mentioned the ease of booking multiple dates, as well as cancellation and refund policies, as informing their decision. One said,

‘Easier to settle a calendar when you can acquire several events at the same time and lock them into one's diary before anything else takes precedence.’

Another said,

‘There is nothing to lose and everything to gain in buying a subscription. Should performances be cancelled or postponed, we are always given the option of a refund.’

Audiences mentioned wanting to support arts organisations and performers – with some suggesting that they've become loyal to certain organisations because of how they have handled the difficulties of the pandemic. One said,

‘It's enriching. And the arts have suffered greatly through COVID and need the support.’

A larger number (47%) of SA audience members said they were unlikely to subscribe next year. Some audiences say they are not in a financial position to do so, while others mentioned the uncertainty of reopening of borders. One said,

‘I want to wait and see how SA will be affected after all the borders in Australia and overseas are opened. If COVID increases substantially in SA I will not be going to many events that are crowded.’

Another said,

‘There's no guarantee of lockdowns wrecking plans, so it'll literally be last minute sales for me, praying there are still tickets available.’

Over the course of the pandemic, the proportion of arts audiences purchasing subscriptions and memberships has fallen. In SA, similar numbers purchased a subscription or membership for the 2021 season (33%), compared to 35% in 2020.

Among SA audiences, 16% have already made a donation to an arts or cultural organisation for the 2021/22 financial year – a slightly smaller proportion than those who donated in the 2020/21 financial year (21%), though more than half of the fundraising year remains.



Online participation

4 in 10 SA audiences are participating in online arts and culture experiences, with participation rates up from July

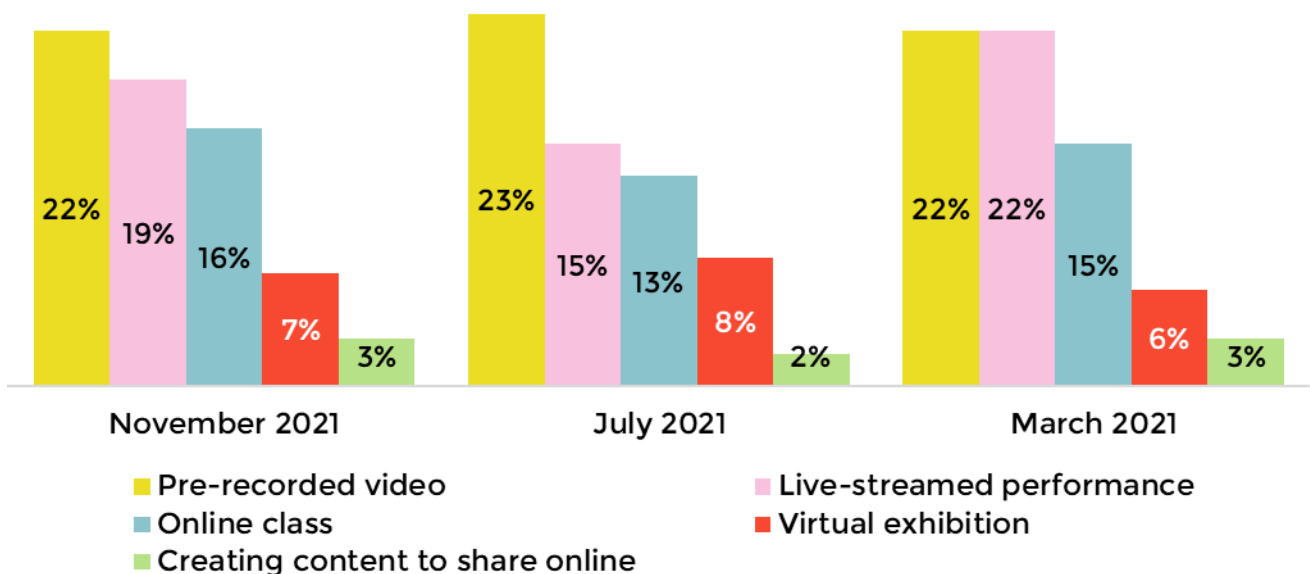
In the first half of 2021, participation in online arts and cultural activities trended downwards, after an early pandemic ‘boom’ in 2020, with many audience members reporting ‘screen fatigue’ and an eagerness to return to regular, in-person attendance.

Surprisingly, however, November saw an uptick in online participation, with 42% of SA audiences participating in an arts or cultural activity in the fortnight before data collection (up from 37% in July 2021).

Specifically, the proportion participating in online courses (16%, up from 13% in July) and live streams (19%, up from 15%) has increased since July 2021. Participation in other activities is consistent, such as watching pre-recorded video (22%, stable with 23%), attending virtual exhibitions (7%, stable with 8%) and creating content to share online (3%, stable with 2%).

SA audiences are slightly below the national average for online participation (48% participating nationally, up from 44% in July) - with outbreak-affected states like NSW and VIC more likely to engage with digital programming, particularly during prolonged outbreaks.

Figure 9: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). SA audiences, November 2021 (n=938)



3 in 10 SA audiences would be happy to attend a digital alternative to a cancelled event

In November 2021, audiences were asked 'In the case of a future live event being cancelled due to COVID-19, how likely would you be to attend a digital program featuring elements of the planned event?'

Half of SA audiences (52%) say they are unlikely to attend a digital program, though a significant proportion say they are likely (28%) – while 20% are neutral.

SA audiences were the least likely to say they were interested in attending a digital alternative, along with audiences in WA (30% likely) and QLD (28% likely). Audiences in outbreak-affected states such as NSW (38%) and the ACT (38%) were the most likely.

Some respondents expressed that digital alternatives to live events are crucial, particularly for those with access needs. As SA one respondent said,

'I think online/digital experiences should not be stopped. For once people with disabilities have been able to access arts events without worrying about accessibility whether that's in the way of ramps for wheelchairs or sensory problems for autistic people like myself.'

However, some SA audience members had caveats – for example, some felt that a digital alternative would need to be offered at a different price point, saying,

'I don't think I'd enjoy seeing something online that you would normally see in the theatre and I'd probably find it hard to justify the cost then and the time to sit down and watch it. Maybe if it was part refunded?'

Others said they would want the digital alternative to be of high value and as close to the live experience as possible. One said,

'Cultural experiences are vitally important to me so of course I would experience them any safe way I can. National Theatre Live gives you the best seat in the house and shows that online experiences can be extremely good quality.'

Another said,

'The quality and experience is not the same. Highly dependent on standard of technology available.'

And,

'A digital programme would be acceptable if the likely experience was substantially similar (e.g. content, duration) to the live experience.'

A greater proportion of SA audiences see an ongoing role for digital in their lives – and digital spending has increased slightly

Overall, the proportion of SA audiences who see a role for digital arts experiences in their lives outside of lockdown has increased since this sentiment was first measured in July 2021.

A larger proportion of SA audiences now see a ‘substantial role’ for digital arts experiences in their lives (20%, up from 9% in July 2021), or even a ‘small role’ (48%, up from 40%). The proportion who sees ‘no role’ for digital arts declined between July and November (32%, down from 51%).

Some SA audiences mentioned that pandemic conditions have influenced their discovery of online arts experiences, as one said,

‘Since lockdowns started in 2020, I’ve become used to seeking out live streamed concerts and pre-recorded concerts online. This has broadened my participation - I’m as likely to attend/consume events streamed from America or the UK as Australia. I don’t think this will change in the future. It will remain a significant part of my cultural participation.’

Furthermore, in November, 32% of SA audiences participating in online arts and culture paid for an experience, increasing from 29% in July 2021. Paying audiences were most likely to purchase a single, pay-per-view experience (13%) or make a donation for something seen online (13%).

Marketing of digital experiences can be targeted to three groups




SA audiences were asked about the role that digital arts experiences play in their lives outside of lockdown. Based on their responses, SA audiences can be divided into three groups:

- ▶ **Digital devotees** are the 20% of SA audiences who see a ‘substantial role’ for digital experiences in their lives. They can be expected to show deeper and more dedicated engagement. Half (51%) participated in arts and cultural activities online in the fortnight before data collection - and on average are more averse to attending in-person right now. Half (49%) of those participating online are paying for online experiences and half (51%) of those spent more than \$50 on online experiences in the past fortnight.
- ▶ **Tired of tech** audience members are the 32% who see ‘no role’ for digital in their lives and are generally more eager to return to in-person attendance. Some report




being 'screen-fatigued' and others say that after trying digital events, they just aren't that interested. However, during stay-at-home orders, some may still be willing to participate online in the absence of in-person alternatives.

- ▶ **Selective but supportive** audience members are the 48% that see a 'small role' for digital in their lives. They feel favourably about online offerings but will generally only participate in the right events and under the right conditions. They are likely to favour digital events that are more convenient, more accessible or less risky than in-person alternatives. Almost half (45%) participated in the fortnight before data collection (3-7 November), while around 3 in 10 (26%) paid to access online content.

Table 1: Key segments for digital audiences, SA audiences (n=902)

	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	20%	48%	32%
When live attendance is possible, the role of digital in their lives is...	Substantial	Small	None
Online participation rate	51%	45%	24%
Live stream participation	27%	19%	10%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	49% online are paying for experiences	26% online are paying for experiences	17% online are paying for experiences
Demographic features	<ul style="list-style-type: none"> • More likely to be in an outbreak-affected state • More likely to have a disability (11%) • More likely to earn income 	<ul style="list-style-type: none"> • More likely to be a parent (25%) 	<ul style="list-style-type: none"> • More likely to live in a regional/remote area (27%)



	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	20%	48%	32%
Other arts behaviours	<p>performing art (23%)</p> <ul style="list-style-type: none"> • More likely to attend a digital alternative to a cancelled event (45%) • Typically attend performing arts very frequently (85% attend once a month or more) • Most likely to be donors to arts organisations (43%) 	<ul style="list-style-type: none"> • Typically attend performing arts frequently (65% attend once a month or more) 	<ul style="list-style-type: none"> • Most unlikely to attend a digital alternative to a cancelled event (75%) • Typically attend performing arts less frequently (31% attend a couple of times per year or less)

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

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

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

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.

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