



Audience Outlook Monitor

# How cultural audiences in SA are impacted by rising inflation

South Australia Snapshot Report – April 2023

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Cover Image Credit: OzAsia Festival 2021, Xplorer Studio, courtesy of Adelaide Festival Centre.



# SA audiences on the economic outlook

Some continue to spend, others make careful choices, as data collected in April 2023 from 153 past attendees shows inflationary pressures impact SA audiences in different ways.



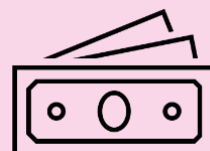
## 4 in 10

44% of SA audiences say they are **worse off** than they were a year ago, and 51% say they are in the **same position**, with a mixed picture across the market.



## 52%

The proportion in SA spending over \$50 on tickets to in-person cultural events has fallen from 60% in both October 2022 and August 2022 to 52% in April 2023, with the outlook uncertain.



## #1

Financial reasons are the **top barrier to attending**, and many SA attendees are looking for free/cheap things to do (56%), staying close to home (52%) and taking longer to make decisions (54%).

## Key national segments



With concerns about the virus fading, Australian audiences **over 55** are now attending and spending more: 40% spent more than \$100 in the past fortnight, compared to 37% in August 2022.



**Families** are facing higher housing costs, and now factor in ticket prices to a greater degree. Parents are the most likely to prefer a different day, time or location to previously.



Despite being early returners to cultural events, **under 35s** feel most negative about their financial prospects, and across Australia are actively looking for low-cost attendance opportunities.



## Key findings: April 2023

# Attendance is steady, but SA audiences are reporting changes to their spending and frequency of attendance

- ▶ Increasing interest rates and cost-of-living pressures are impacting consumer confidence around the country. This 'Pulse Check' explores how SA arts audiences are responding to changing economic conditions, based on data from 153 past attendees.
- ▶ While consumer sentiment in SA has been stable over the past 12 months, it has decreased since April 2021, with the [Westpac-Melbourne Institute](#) calculating the Consumer Sentiment Index (CSI) in SA to be at 80.0 in April 2023, down from 116.8 in April 2021.
- ▶ Around 4 in 10 (44%) SA audience members surveyed say they are 'worse off' financially, compared to one year ago, while 6% said they are 'better off' and 49% say they are the 'same.'
- ▶ While three-quarters of past attendees (73%) attended a cultural event in the fortnight before data collection (19-23 April), consistent with October (75%), attendance preferences and behaviours are changing.
- ▶ Most SA audiences are attending cultural events (73%) consistent with the national average (76%), though half (52%) report their frequency of attendance at events has decreased over the past 6 months.
- ▶ Spending levels on arts and cultural activities in SA have decreased slightly, with half (52%) of those attending in the two weeks prior to data collection spending \$50 or more, down from 60% in October 2022. However, averages should be interpreted with caution, as some segments are actually spending more, and others less. Jump to the [National Segments](#) for a breakdown of who in Australia is impacted differently.

# SA audiences are deliberating longer on factors such as price, location and overall value – with financial reasons being the top barrier to attendance

- ▶ Financial reasons are the top barrier to attendance for audiences in South Australia, impacting 46% surveyed in April 2023, while COVID-related concerns decline in prevalence.
- ▶ The data also suggests 1 in 5 are **prioritising other things** (22%), as lifestyles continue to evolve after the pandemic. Qualitative data shows that travel, work and other commitments play a role as household budgets adapt to suit the conditions.
- ▶ When asked about their cultural spending over the past 6 months, 30% of SA audiences say **the price they are willing to pay** to attend has **decreased**, slightly below the national average (35%).
- ▶ When reflecting on the most recent event they attended, over 4 in 10 SA audience members said that **price influenced them 'more than usual'** (44%) – consistent with audiences generally (39%).
- ▶ More than half are looking for **free/cheap** things to attend (56%) and qualitative data shows that discounts and pricing offers are impacting the decision-making of some SA audiences.
- ▶ **Some SA attendees are 'splurging' and 'saving' to different degrees** – and qualitative data some are doing both, opting to splash out on events that are important to them, while making savings elsewhere by prioritising events they are most excited for.
- ▶ While audiences say they have decreased spending on **subscriptions/memberships (31%) and donations (39%)**, many who engage in these forms of support say they plan to continue, acknowledging tough conditions for artists and a desire to show their support in tough times.

# There is appetite among SA audiences for a vibrant arts landscape, but tailored strategies for different segments are key

- ▶ Consistent with trends at the national level, many in SA are **taking longer to make decisions** about attending (54%), and **last-minute ticket-buying** appears here to stay for the time being.
- ▶ The location of events is also impacting **35% of SA attendees more than usual** and 52% say they are staying closer to home. Qualitative data suggests that proximity to events plays an important role, with one saying, 'I live on the south coast of SA about 80kms from Adelaide so need to factor in driving time/energy - less shows available locally.'
- ▶ Some segments are **more disadvantaged by travel costs** than others, and logistical considerations in scheduling events will be important for catering to a range of audiences.
- ▶ When asked about the next 12 months, responses confirm **enduring appetites for new** (60%), and **uplifting** (69%) cultural experiences. However, a significant proportion wants challenging arts experiences (44%), confirming the need for balanced programming.
- ▶ When asked to share what they've attended recently, and why they prioritised those things, some common themes include a **desire to support emerging and struggling artists and organisations they value** and return to things they've missed.
- ▶ Economic conditions are complex and affect every household differently. However, looking at the trends in three [key national audience segments](#) can assist with understanding some of the differences and identifying practical implications (overleaf).
- ▶ With an uncertain outlook, and the possibility of a recession, it's wise to stay flexible and consider how **strategies and tactics can be adjusted as conditions change**.

## Opportunities

As conditions continue to change, opportunities exist in terms of programming, marketing and ticketing. However, the right solutions will look different for every organisation. The ideas outlined below are put forward to get you thinking, and any action should be considered in terms of what's right for you and your audience.

### **Programs featuring diverse topics and different price points are likely to reach the broadest audiences**

- ❑ Review the [Arts South Australia Bulletin](#) for updates on opportunities and events, to help your organisation stay ahead of the curve in diverse programming, philanthropy and marketing
- ❑ Keep in mind audiences' desire for fun, uplifting events in the post-pandemic era, but don't forget there are sizeable numbers wanting new, topical and/or challenging things – some audiences have expressed wariness of commercialisation or softening of the cultural activities they love at the expense of creative innovation
- ❑ Review the price points of your offerings and consider how audiences in different segments will assess value for money
- ❑ Research the demographic shifts affecting your area and explore as a team how behaviours like working from home, commuting and travel are changing
- ❑ Keep on top of transport options to your area, such as public transport schedules and initiatives, and consider these when scheduling events
- ❑ Consider programming earlier event options/matinees to encourage attendance among cost-conscious parents or outer metro/regional audiences who might catch public transport or drive but want to avoid travel rush or late-night travel
- ❑ Consider seeking partnerships or aligning programming with Festivals or events to help diversify and expand the audience you're reaching

- ❑ Looking ahead, consider the right frequency and volume of events for the economic conditions. It might be helpful to plan for different scenarios such as a fast rebound or prolonged recession.

## Clear and helpful marketing campaigns can help get indecisive audiences over the line

- ❑ Look at ways to take pressure off audiences by spelling out instructions on how to get to and from events, on your websites, newsletters or pre-event emails
- ❑ Consider researching and promoting any money saving transport or parking initiatives, [such as free travel for Seniors](#), to suggest ways audiences can save money, outside of just the ticket price
- ❑ Consider creating and promoting itineraries for a 'night out' based on different budgets e.g., suggested transport, pre-show drink destination and post-show dinner destination
- ❑ Take time to get digital marketing right and wherever possible, tailor the words, imagery and channel, based on things like prior attendance, post code, age, family status or income (sometimes reaching a smaller group with the right campaign will deliver better engagement than a broad campaign to a bigger group)
- ❑ Where one event ticks various boxes, consider A/B marketing tactics to communicate the same event to different segments in different ways.

## Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer

- ❑ Look at ways of rewarding early bookers with earlybird discounts or newsletter subscriber pre-sales, rather than resorting to last minute 'panic' discounting
- ❑ Consider offering cheaper ticket prices for young audiences and if already in place, reviewing age limits – i.e., under 35 may be a more appropriate limit than under 30 or under 25, given the current conditions, and some artforms may have a case to extend this to under 40



- ❑ Consider offering group discounts or family ticket offers (e.g., 2 adults, 2 kids or 1 adult, 3 kids) to relieve cost pressures from price sensitive parents and caregivers, and encourage group bookings
- ❑ Review the approach to booking fees and consider a per ticket fee or a scaled offer e.g., a percentage of total purchase instead of a set per transaction fee, which has a higher impact on single ticket purchasers
- ❑ Clearly communicate where booking fee money is going and consider investigating a payments solution like [ArtsPay](#), as some audiences are put off by high booking fees, but many are keen to support the arts and artists.

## **With some arts audiences doing well financially and others struggling, it might be time to introduce alternative payment models**

- ❑ Investigate ways to facilitate 'pay it forward' tickets, where people in more comfortable financial positions can purchase or subsidise tickets for people more affected by cost-of-living pressures
- ❑ If feasible, options to pay in instalments could take the pressure off audiences splashing out big purchases, and encourage more to book in advance
- ❑ For lower cost events, consider a 'pay what you want' model with a small pre-purchase deposit to encourage more risk taking from audiences to see something new, topical or challenging, but avoiding risks around no-shows.

## Introduction

### **This April 2023 ‘Pulse Check’ asked 153 SA past attendees of cultural events about their response to cost-of-living pressures**

This South Australia (SA) Snapshot Report outlines key findings from the April 2023 ‘Pulse Check’ phase of the Audience Outlook Monitor in Australia, based on data collected from 153 audience members living in SA.

The ‘Pulse Check’ survey is a short, targeted questionnaire developed between the October 2022, Phase 8, and the upcoming August 2023, Phase 9, of the Audience Outlook Monitor. It is designed to ‘take the temperature’ of audiences in response to heightened cost of living pressures.

After three years of the pandemic, the [Australian Bureau of Statistics \(ABS\)](#) reports that over the twelve months to the March 2023 quarter, the consumer price index (CPI) rose 7%. Interest rate rises are impacting households and consumer confidence around the country.

On 19 April 2023, Patternmakers sent the ‘pulse check’ survey to 8,000 past respondents from previous phases of the study, who opted-in to be contacted about future research on this topic. The survey closed on 23 April 2023.

This report compares the new results with data collected previously in March 2022 (Phase 7), August 2022 (‘Pulse Check’) and October 2022, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions. In reporting the results, the results for South Australian audiences should be interpreted with caution due to small sample size.

Where possible, results have been triangulated with other data sets. Where relevant, the SA results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

## Consumer confidence

### 4 in 10 SA audience members feel their household is financially 'worse off' than they were a year ago

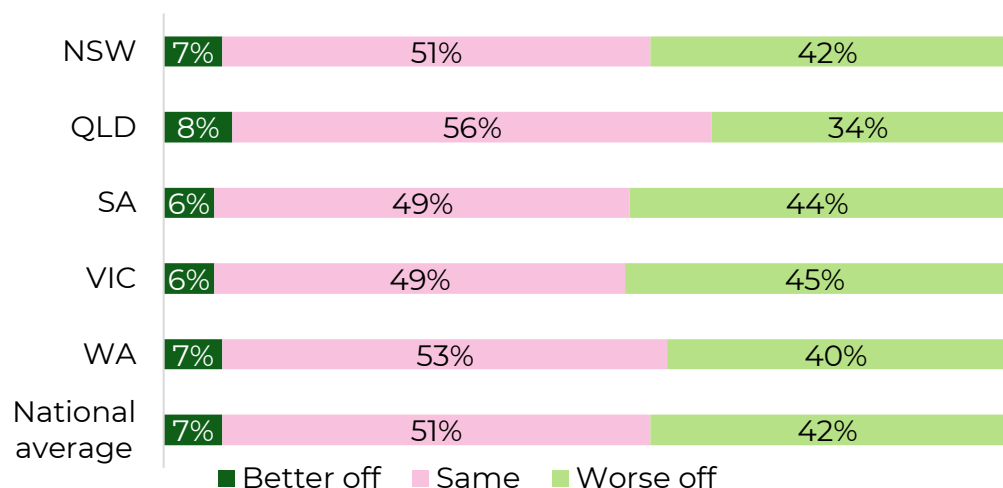
With economic pressures taking root in the post-pandemic period, households around the country are feeling the effects of the rising cost of living and interest rate increases. [The Westpac – Melbourne Institute](#) calculates that consumer sentiment among SA residents in April 2023 was at 80.0 on the Consumer Sentiment Index (CSI), declining marginally from 82.1 in April 2022, and significantly from 116.8 in April 2021.

The April Pulse Check survey aimed to measure aspects of consumer confidence among Australian attendees of arts and cultural events.

In April 2023, audiences were asked: 'would you say that you (and any family living with you) are better off or worse off financially than you were a year ago?'. On average, 44% of SA audience members said they are 'worse off', 49% said they are the 'same' and 6% said they are 'better off' – consistent with the national average (Figure 1).

The results vary slightly between states. QLD audiences are the most likely to say they are the 'same' (56%) or 'better off' (8%) of any state. Audiences in VIC and SA are the least likely to say they are the 'same' (both 49%) or 'better off' (both 6%).

Figure 1: Proportion of audiences who say they are financially worse off, the same, and better off, compared to one year ago, by state (n=1315)



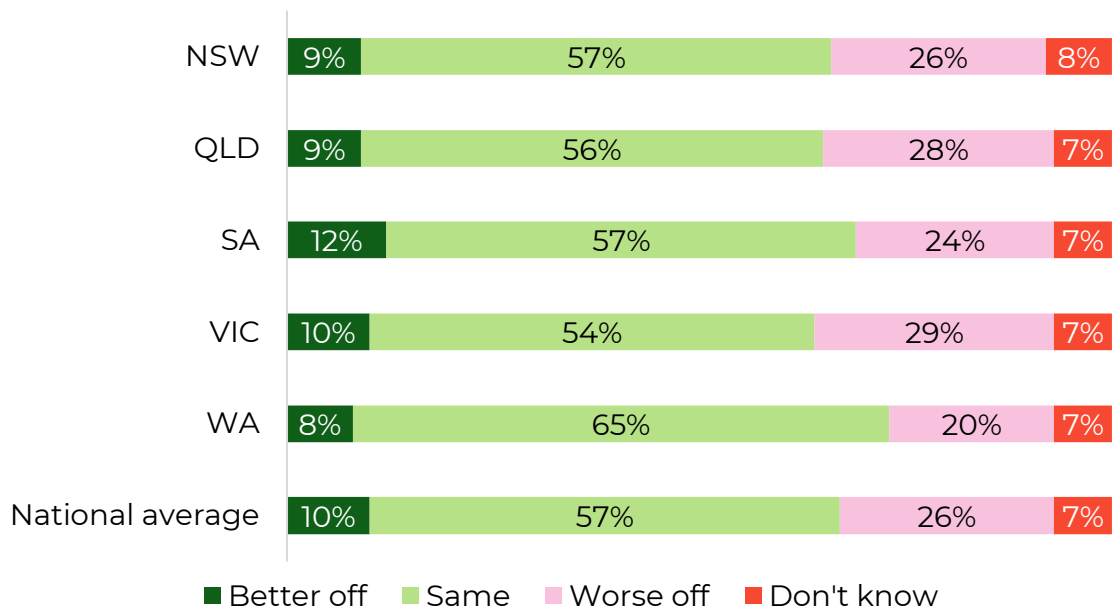
## While many are optimistic the economy will stabilise, 4 in 10 SA audiences feel that there will be 'bad times' ahead

Audiences were asked, 'Do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just about the same as now?'. Most SA audiences expect they will be in the same position (57%) while one quarter (24%) expect to be worse off. One in 10 (12%) expect they'll be 'better off' and 7% 'don't know' (Figure 2).

The outlook is relatively similar across the country, with the majority of audiences expecting their situation will be the 'same'. Audiences in WA were most likely to say their financial circumstances a year from now will remain the 'same,' (65%), and the CSI is trending the most positively in WA at the moment.

When it comes to economic/business conditions in the country as a whole, half of SA audiences said they thought the outlook was uncertain (49%), while 4 in 10 (38%) said the country will have 'bad times' ahead. 1 in 10 (8%) expect the country will have 'good times' ahead - the highest of any state. By comparison, audiences in NSW are the least likely to anticipate 'good times' ahead (4%).

Figure 2: Proportion of audiences who say that in a year from now, they expect to be financially worse off, the same, and better off, compared to one year ago, by state (n=1,315)



“

'The reason we're not going out as much is to save money. We're much more selective on what we pay to see. In the past I would pick shows that would pique my interest. Now I only book shows that I really want to see and can afford. For example, we went to one day at Womad this year as my husband wanted to see Florence and the Machine. That meant we couldn't go to any other shows at the Adelaide Festival when we usually pick 3 or 4.'

SA audience member, April 2023



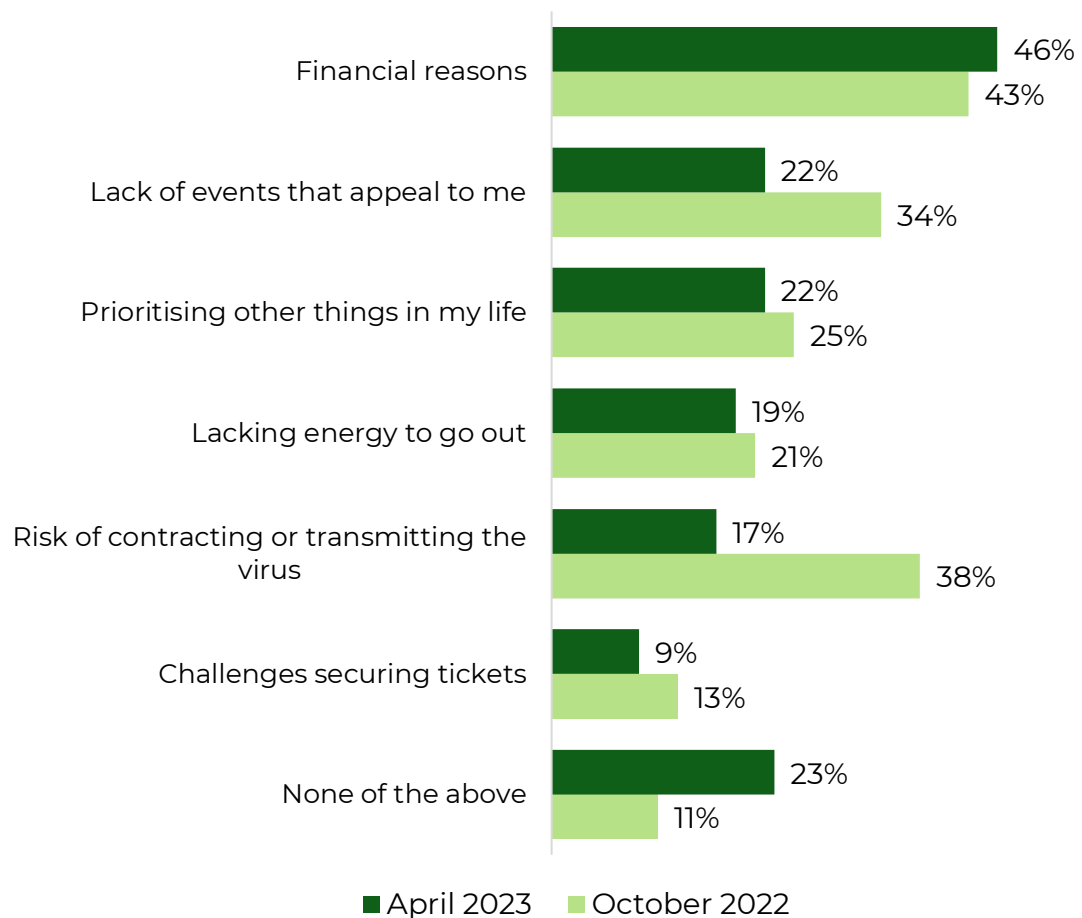
## Attendance outlook

### Financial reasons are the top barrier to attendance, affecting almost half (46%) of SA audience members

The April 2023 Pulse Check results show that financial reasons are the top barrier to attendance at the moment, affecting 46% SA audience members. The results are relatively consistent with October (43%), and higher than August 2022 (25%) and March 2022 (20%) (Figure 3).

Across all states, in April 2023 and October 2022, SA audiences were the most likely to cite financial reasons as a barrier attendance, relative to a national average of 38%.

Figure 3: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three). SA audiences, April 2023 (n=153) and October 2022 (n=697)



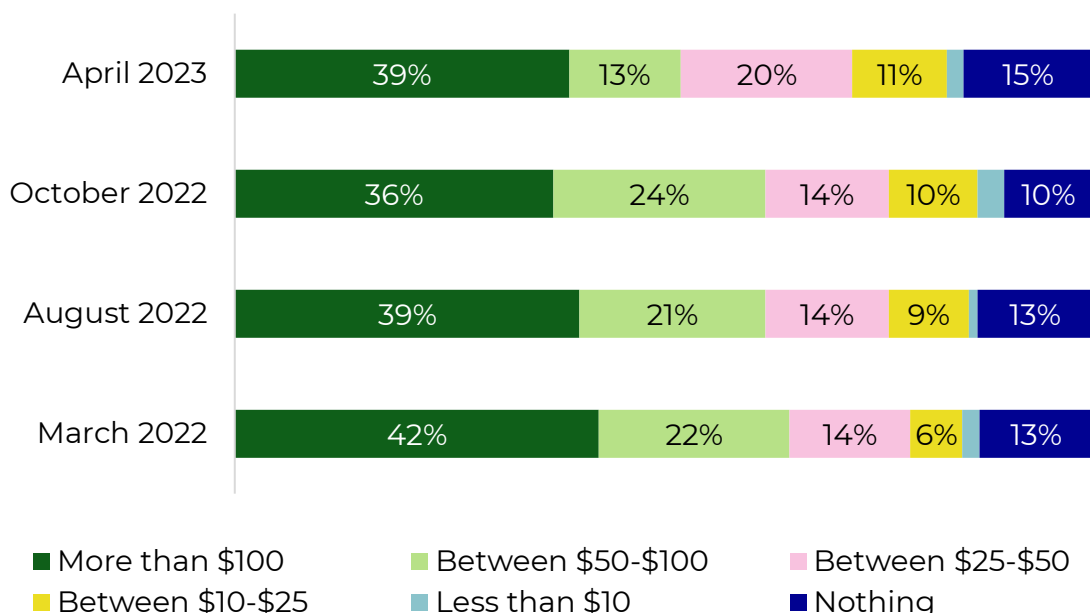
## Most SA audiences continue to attend events, but their behaviour and spending have changed amid cost-of-living pressures

Three-quarters of SA audiences (73%) say they attended a cultural activity in the two weeks prior to data collection, consistent with October 2022 (75%), and slightly down from August 2022 (78%).

SA audiences reported having attended a wide variety of activities two weeks prior to data collection, including live performances (41%), visiting museums or galleries (32%), cinemas (29%) and fairs or festivals (13%).

Spending levels on arts and cultural activities in SA have decreased slightly, mirroring the national trend that spending is not increasing. In April 2023, the proportion that spent \$50 or more on tickets to live events and cultural events was 52%, down from 60% in October 2022 and August 2022.

Figure 4: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? SA audiences, March 2022 to April 2023 (n=111)



Qualitative data suggests that SA audiences are conscious of balancing financial pressures, while still eager to attend their favourite cultural activities. Some mentioned having to cut back on arts and cultural spending in the current context, as one said,

‘Renewed our Subscription to Adelaide Symphony Orchestra concerts [in] late 2022, for [the] 2023 season. Rather doubtful will be able to do the same next year, unless the economic situation improves, which isn't hopeful.’

As they make decisions to attend cultural events, securing low-cost tickets is also key factor for some audience members. One said,

‘We enjoy the French Film Festival & go every year. At least it doesn't break the bank, tickets were \$17 each per film this year for us, as I'm a member.’

Free or discounted offers are particularly appealing to some SA audiences at the moment. One said,

‘Free or discounted tickets have meant that we can make an outing and buy drinks or meal as well.’

Despite cost-of-living pressures, many are keen to ensure their lives continue to be enriched by arts and cultural activities. One said,

‘I currently have no income [and am] living on savings. I try not to let that impact on my spending. If I want to see a show, I do. I also source free events.’

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‘[I went to the] State Museum - taking my 2-year-old toddler and newborn (4 weeks old) and partner. It was free and "low stakes" with two little kids in tow.’

SA audience member, April 2023

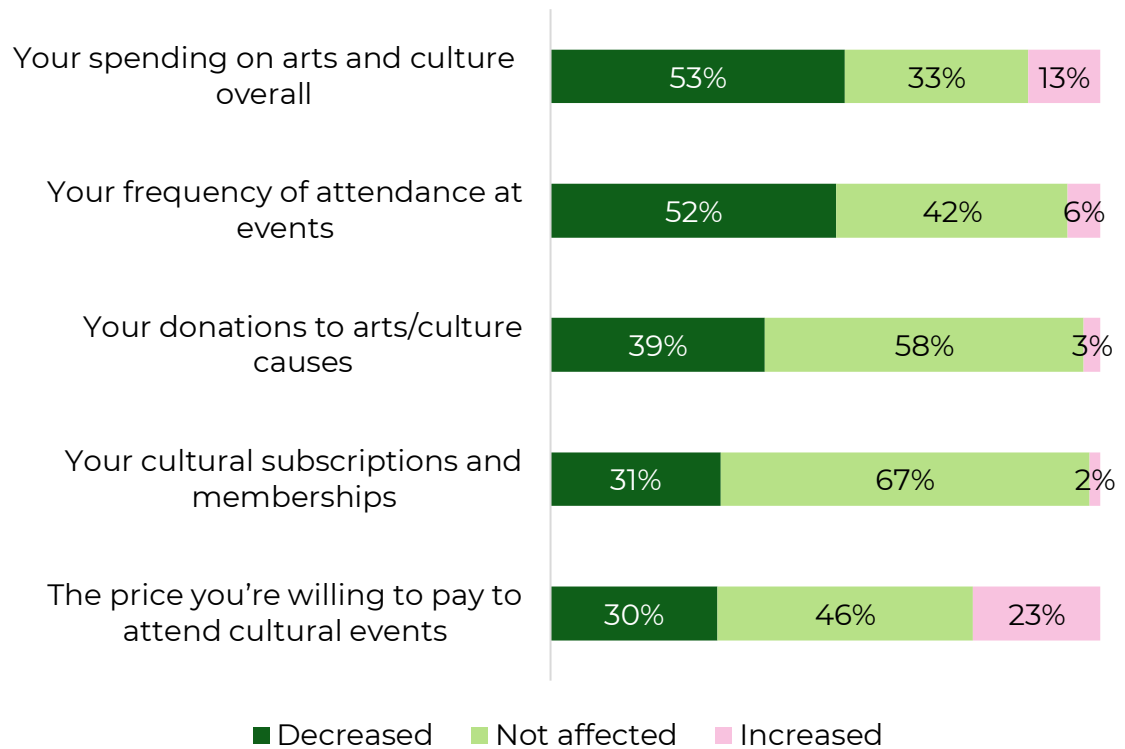
## Half say their overall spending (53%) and frequency of attendance (52%) at arts events has decreased in the past 6 months

Respondents were asked to indicate the extent to which their arts and cultural spending has been affected by economic conditions, and in what ways.

From the list of options, SA audiences were the most likely to say their overall spending (53%) and frequency of attendance at events (52%) as decreased in the past 6 months.

Among behaviours that are most likely to have remained steady, SA audiences said that subscriptions and memberships (67%) and donations to arts and cultural causes (58%) have not been affected, suggesting that loyal attendees are committed to continuing to support the arts.

Figure 5: In the past 6 months, have the following things increased, decreased, or not been affected? SA audiences (n=153)





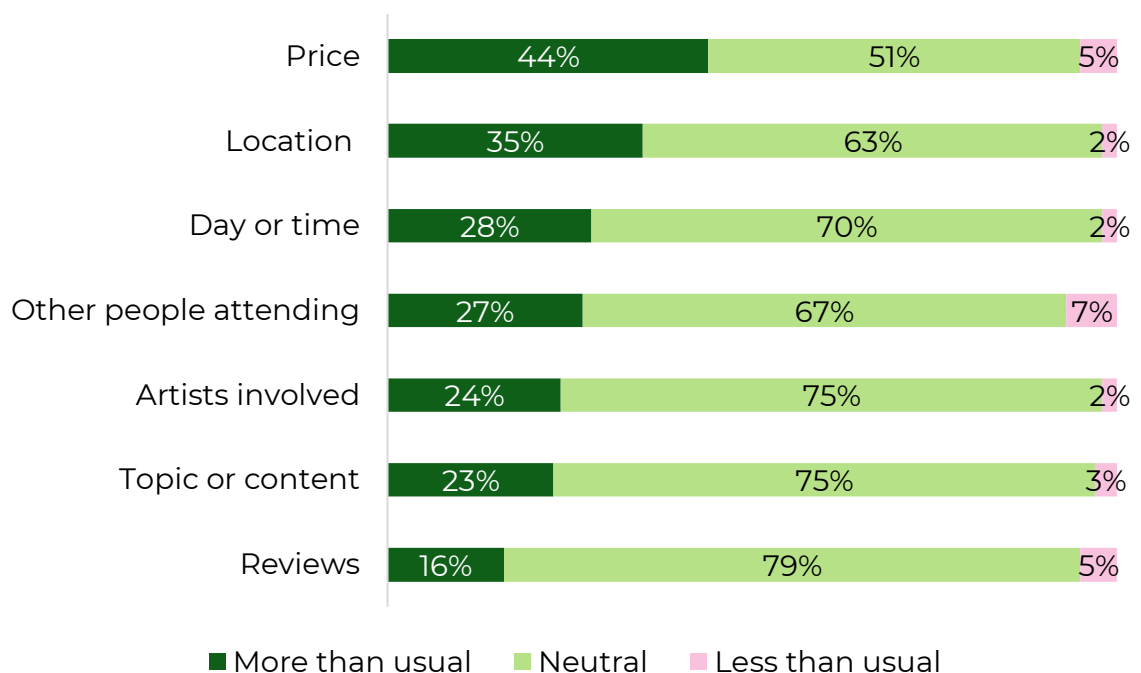
## 4 in 10 SA audience members say they are affected by the price of arts events more than usual at the moment

Respondents were asked the extent to which their attendance decisions have been influenced by a range of factors, compared to pre-pandemic times.

From a list of options, SA audiences were most likely to say that price has affected them 'more than usual', compared to pre-pandemic times (44%). This was followed by the location of cultural events (35%), the day or time (28%) and other people attending (27%).

Reviews were the least likely factor to influence audience attendance decisions 'more than usual' at the moment (16%).

Figure 6: Compared to how you approached attending prior to the pandemic, to what extent were you more or less influenced by... SA audiences (n=111)



One SA audience member mentioned that increasing ticket prices mean they're attending less than before, especially when factoring in a large family,

'Tickets for performances at the Festival Centre and entertainment arena are getting so expensive and don't allow for family groups of 5. For me this means missing shows I love.'

Another respondent described the various costs involved in planning their attendance, and the factors that helped them save money, saying,

'I travelled from my home in Regional SA to Adelaide especially to see 'Come From Away'. Amazing show, thoroughly loved it! [Along] with the ticket cost of \$170 - my return air fare cost \$462 (outrageous, in my opinion). Luckily, I have a friend to stay with in Adelaide, so I don't need to pay for accommodation. I love going to live theatre and heard that it was a great show.'

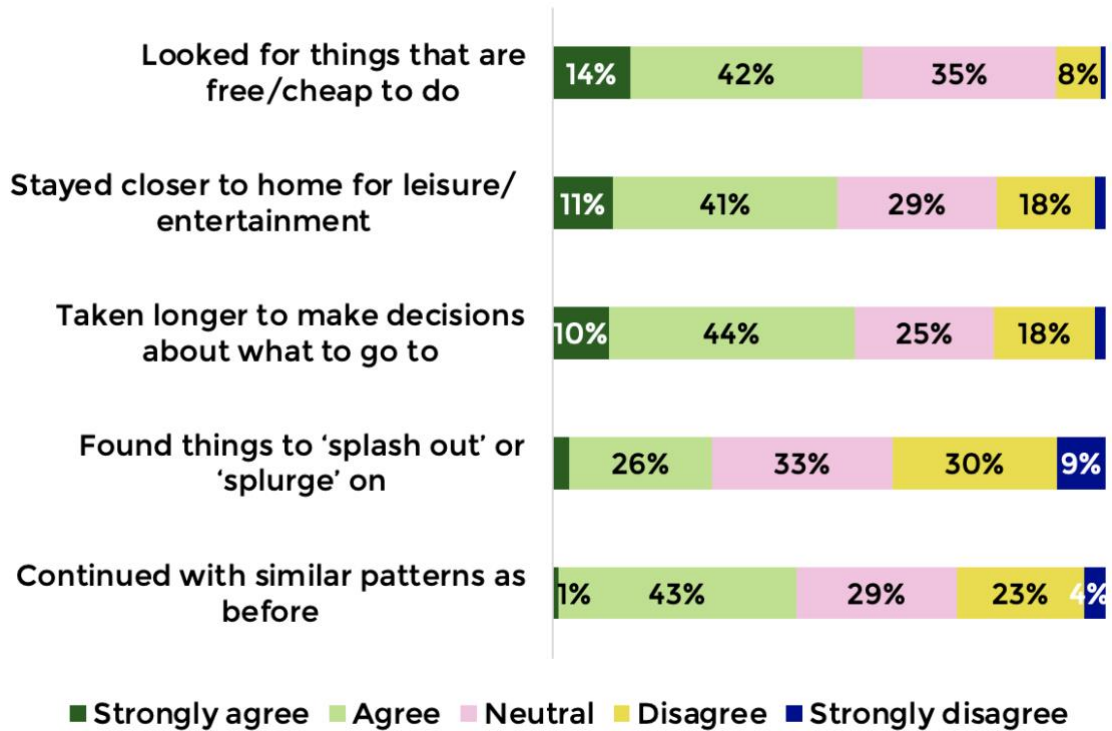
## **Over half of SA audiences are looking for free/cheap things (56%), or taking longer to make decisions about what to attend (54%)**

Audiences were asked about the behaviour they've engaged in over the past 6 months, in light of their financial situation. SA audiences are most likely to be 'looking for things that are free/cheap to do' (56% 'strongly agree' or 'agree') and less likely to be finding things to 'splash out' or 'splurge on' (29% 'strongly agree' or 'agree') (Figure 7). One said,

'[I went to the] State Museum - taking my 2-year-old toddler and newborn (4 weeks old) and partner. It was free and "low stakes" with two little kids in tow.'

SA audiences are also taking longer to make decisions about attending (54%) – consistent with trends observed in previous phases of data collection around last-minute ticket buying.

Figure 7: Given my financial situation, in the past 6 months, I have... SA audiences (n=153)



## SA audiences remain eager to attend – though may be more selective about what they can fit within their budget

Several SA respondents shared that despite costs increasing, they are prioritising the cultural events they can attend within their budget. One said,

'I have been very happy to find things coming back to normal and am taking the chance to attend events which appeal to me, taking into account my budget and the suitability of times.'

Another said, shared that they are opting to prioritise events they are genuinely excited about attending:

'I will still make sure I attend the things I really want to go to and delete the ones I was perhaps less enthusiastic about. I will still pay whatever for the right ones.'

One mentioned they had been looking out for events that combine affordability with added value such as ease of transport, food and drink:

‘Personally, I will attend any theatre, art class, seminar if I hear of it and it interests me, so marketing is prime. Costs are relevant though, as life is more expensive these days. Venues with parking or safe public transport at night is important. Good food or wine availability also makes the event feel special and celebratory.’

Another said,

‘Arts, music, cinema and cultural events are very important to my well-being mentally. I am fortunate not to owe any money (and own my property), but I think times are tougher for many, especially on fixed or low income. CPI is high. I am prepared to pay a higher ticket price for quality /world-class productions. But, still, I do tend to look for lower priced tickets (may select C instead of B seating) or free events. AGSA is fabulous being largely free entry.’

## **The rising cost of travel – particularly for those outside of metropolitan areas – disadvantages some segments**

As shown in Figure 6, one-third (35%) of SA audiences say the ‘location’ of events is affecting their decision making more than usual – and half are opting to stay closer to home (52%). One said,

‘I live on the south coast of SA, about 80kms from Adelaide, so need to factor in driving time/energy - less shows available locally.’

For some segments, time and costs associated with travel may compound other challenges they face in terms of attending arts and cultural activities, such as health and other life demands. One said,

‘Getting to functions has become more difficult as I age. Driving to events, parking and walking is hard. Public transport is less accessible and more uncomfortable, and taxi fares are an added expense. I find a lot of old people I know, who've supported the Arts in the past, are in the same situation. I don't believe there's a magic fix, that's just how it is.’

Promoting money-saving transport or parking initiatives may assist in making attendance more seamless for audiences in the current financial context. One said,

‘The change last year, that made all public transport free to seniors, has increased our attendance to city centre events and activities, as the cost of city parking no longer impacts our decision-making.’

As touring becomes increasingly costly for arts organisations, SA attendees are aware of limited options outside of major cities in other states – and added costs related to travel are a key factor at the moment. One said,

‘I am disappointed that Adelaide has missed some things that Eastern states & even Perth have had. Why? And travelling to Melbourne (which we once did) is too 1. dangerous (virus) & 2. expensive for us.’

Along with promoting transport initiatives, arts companies based in Adelaide who are noticing a decline in outer metropolitan or regional visitors may wish to take some of the pressure off attendees by specifying instructions on how to arrive on their websites, newsletters, or pre-event emails.

## **Attendance continues to be impacted by other lifestyle changes for 1 in 5 SA audience members**

Some SA audiences report other factors, such as behavioural and habitual changes, as a reason for not attending, indicating they may continue to impact the sector’s recovery.

One-fifth (22%) of SA respondents say they are prioritising other things in their life right now, consistent with October 2022 (25%).

Qualitative data highlights a diverse range of circumstances which have contributed to arts and culture not being as much of a priority in their lives anymore, from work to family commitments, travel and health. Scheduling events around work and life commitments – of themselves and others – can be challenging, as one said,



‘My situation is currently uncertain, as I’m in the process of selling my home - so [I’m] mostly too busy or tired to think about going out much! Also, going to live shows is often dependent on finding a friend who wants to and is able to attend at the same time. Cinema, art galleries and suchlike are fine to attend alone, but less so for live events.’

Others are resuming their travel options and may have less time or resources to allocate to cultural activities. One said,

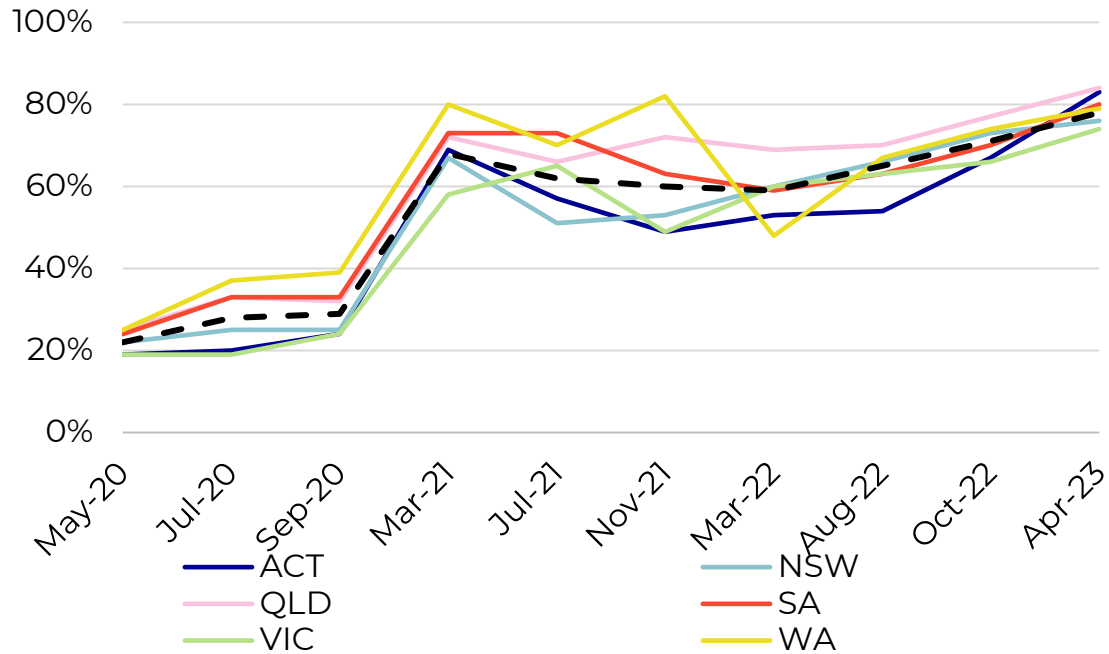
‘Travel options have opened up and time and energy are being redirected to "catching up" on missed travel plans.’

## **Though COVID-related barriers have declined, 1 in 5 cite a lack of energy to attend cultural events**

As we learn to live with COVID-19 in the community, fears surrounding contracting and transmitting the virus continue to decline. In April 2023, 17% of SA audiences selected the risk of contracting or transmitting the virus as a barrier to attendance, down from 38% in October 2022 (Figure 8).

Eight in 10 (80%) said they are ready to attend ‘now or whenever permitted,’ up from 70% in October 2022 (Figure 8). Another 20% say they will attend when reasonably confident that the risk of transmission is minimal.

Figure 8: Proportion of audiences who are ‘ready to attend now or whenever permitted’, May 2020 to April 2023, by state/territory (n=1,311).



However, consistent with national trends, the long-term effects of the pandemic continue to impact some SA audiences’ stamina for attending. One-fifth (19%) say they lack energy to go out. One SA respondent said,

‘As I am busy as a performer and writer myself, it’s time and energy I have to conserve more than money. I often find that I’m unable to get to events I’ve booked for because of double-booking not having the stamina to do it all.’

Another said,

‘I quite often book tickets and then can’t go - which is sad for me, but I’m glad that at least the artists get some money. Working very long hours and far too hard - I work in health and it has been really tough. I love music and really want to be able to get to more concerts, but very hard when I’m so tired.’

A quickly growing proportion say they are not currently facing any barriers to attending – one-quarter (23%) in April 2023, up from 11% in October 2022 – despite the numerous complex barriers to attendance cited by many. One respondent said,

'I'd say I have actively increased my attendance at arts and festivals. Have seen and participated in more events and things I wouldn't have previously.'

## Looking ahead

### Qualitative data suggests last-minute ticket buying remains a trend for 2023

Previous rounds of the study revealed a trend of last-minute ticket buying. In August 2022, SA audience members were most likely to have been booking for events within the next seven days (29%) or the next 2-3 weeks (42%), and qualitative data in October 2022 highlighted the ongoing prevalence of the trend.

Likewise, qualitative data suggests the trend has continued into April 2023, and it could be here to stay a while yet.

Financial pressures may cause some audiences to hesitate and be convinced before making bookings in advance, with some opting for rush tickets and last-minute offers. One SA audience member said,

'Due to financial situations (more saving money because [of] not being able to attend stuff during COVID), I find I take longer and more convincing to buy tickets for events.'

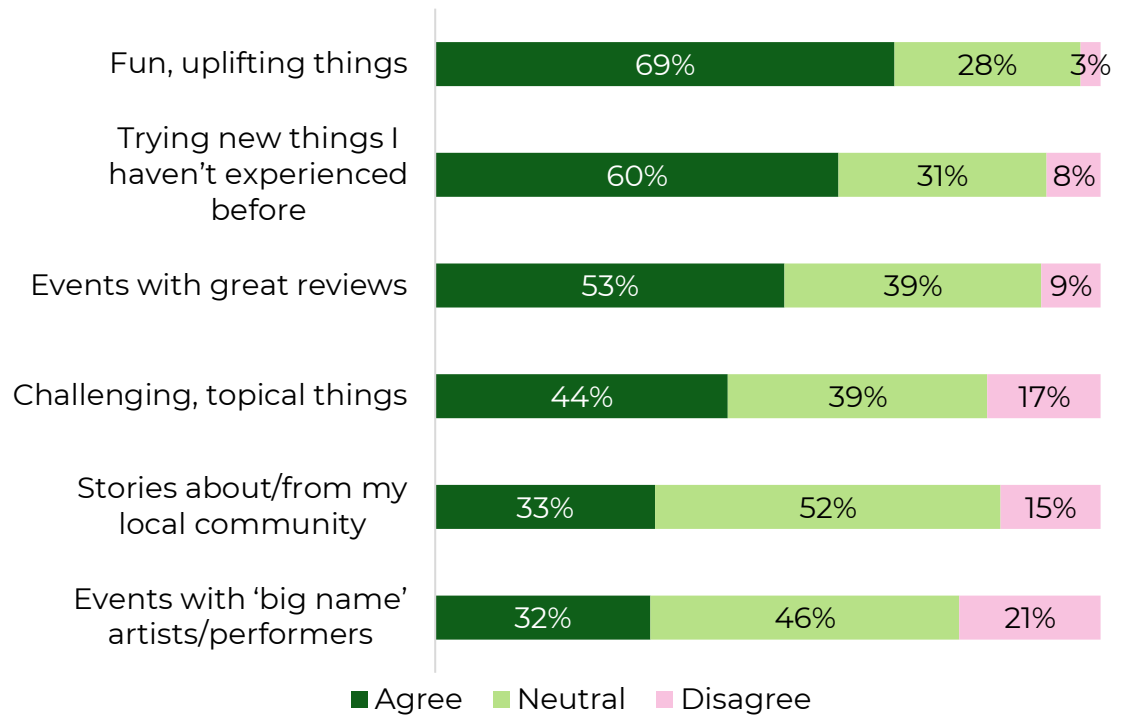
### 7 in 10 SA audiences say they will be attracted to fun, uplifting things in the coming year – and 60% have an appetite for new things they haven't experienced before

Audiences were queried about the types of cultural activities they'll be most attracted to over the next 12 months.

SA audiences are most likely to agree that they'll be attracted to fun, uplifting things (69%), and 6 in 10 (60%) will be seeking new things they haven't experienced before (Figure 9).

However, there is also a strong appetite for challenging, topical things (44% agree), suggesting that diverse programming remains key to attracting different types of audience members.

Figure 9: In the coming year, I'll be most attracted to... SA audiences (n=153)



Qualitative data reinforces the need for diverse programming, as one SA audience member said,

'Continue to provide uplifting events as well as those that challenge our understanding of the world around us.'

Audiences in SA reported attending a wide variety of programming. Many SA respondents mentioned having embraced the recent festival season in South Australia, enjoying the diversity of acts and pricing options on offer. One said,

'The last event I attended was the Adelaide Fringe festival, where I attended several events. The Fringe Festival provides many diverse acts at a reasonable price and always represents good value for money, so that is why we prioritised this event.'

Another said,

'I attended Adelaide Writers' Week in March, as part of the Adelaide Festival. I also attended Festival opening night show and a couple of Fringe performances. I love reading and Writers' week is always brilliant. Friends often suggest shows to me, which I usually attend with them.'

## SA attendees have an appetite for both local acts and touring acts, to support a diverse cultural landscape

In April 2023, audiences were asked, 'Do you have any suggestions for how artists or cultural organisations could address your needs and interests best, moving forward?'

Coming off the back of a successful festival season earlier in the year, many are keen to continue supporting the arts, but are eager to see a return to touring from interstate companies. One said,

'In SA, we do not get visited very often by Australian Ballet, Australian Opera, ACO do not put on their most innovative programs, there's been less dance generally.'

Another said,

'Adelaide is overlooked by many musicians.'

Many regional audiences also want to experience more in their areas, as one respondent said,

'More opportunities in regional areas would be appreciated - not as keen to travel to metropolitan Adelaide as I used to be.'

However, some acknowledge the challenges associated with touring for artists and cultural organisations in the current economic climate. One said,

'I understand how tough it is for artists and do attend local events whenever I can. There is a great local live music venue in Goolwa which I often attend. Bringing more shows to the regions would be great. Although expense and facilities can be an issue. The French Film Festival now shows several films at our local cinema every year.'

It appears that the pandemic allowed some audiences to grow their appreciation for local talent, as one said,

'COVID restrictions made me realise how much there is to offer in local abilities and venues. I would like to see more support for local groups and talents and enthusiasms.'



Another said,

'I went to a play performed at a local small theatre group and I will attend another in the next week. I have been attending these events for a number of years and will continue to do so.'

## **Several SA respondents gave suggestions for improving opportunities for attendance amidst cost-of-living pressures**

With cost-of-living challenges front of mind for many audiences, some respondents made practical suggestions for addressing financial barriers in the current climate. One suggested reviewing ticketing models,

'Perhaps offer AfterPay for Fringe events or similar to make it more affordable. I think in this day in age it's needed and not everyone can afford up-front costs to shows with the cost-of-living etc or have a credit card and can use that option.'

Another suggested providing more discounted ticket options for last-minute sales,

'Providing lower priced tickets on the day of performance, to fill up auditoriums.'

One suggested discounting for regular attendees and offering early-bird discounts:

'Perhaps some specials when a show is announced for those that are regular attendees.'

However, others advocated for greater government investment in addressing the cost-of-living crisis and its relationship with arts and cultural attendance. One said,

'The cost-of-living crisis is the biggest barrier for me, and it's not up to individual artists or organisations to solve the problems like sky-rocketing housing costs and having to work the equivalent of two full-time jobs to survive. Federal and state governments need to step up with real solutions, or this crisis is going to keep impacting audience numbers.'

## Some SA respondents suggested ideas for reviewing the logistics of cultural events that might make attendance more seamless

Some SA audience members are eager for earlier shows – and this may be a factor for consideration as we move into the colder months, particularly with flu season approaching. One said,

‘I think perhaps having more matinees for people who don't like going out at night during the winter months.’

Another said,

‘We prefer their Sunday afternoon concerts: we can drive in daylight without any parking problems.’

Others made suggestions for improving ticketing systems, as one said,

‘Efficient online booking systems where the company/institution keeps personal track of your bookings makes life much easier. Ukaria is a good example of personal but business-like advertising and ticket selling.’

Some audiences are feeling spoilt for choice with all the arts and cultural opportunities that are on offer but may be experiencing challenges in securing tickets because of calendar clashes. One said,

‘I like to attend musical events and it's a bit frustrating when they are scheduled close together. However, I am aware that the promoter doesn't have any input into this.’

This challenge may be mitigated by ensuring enough notice is provided for event dates and schedules. One said,

‘I find that performance run dates are often not advised early e.g., performance dates for & Juliet are not available for other states.’

## **SA audiences support a vibrant landscape – and are eager to show support for the things they love - despite facing financial barriers**

SA audiences expressed their admiration and appreciation for the arts and cultural activities on offer, and are eager to continue attending, despite the current barriers associated with the cost of living. One said,

‘I think we are offered a good range of opportunities across the board. Finance is what restricts my participation in as many things as I used to before, i.e., less cinema, less theatre, less concerts. The events I have attended were brilliant.’

Another said,

‘Happy with the diversity of cultural events offered in South Australia.’

Respondents shared messages of support and encouragement for struggling artists and cultural organisations. One said,

‘Not really. I understand how everything is difficult for everyone and think we, as an audience, have to appreciate that.’

However, in light of economic pressures – organisations should remain conscious that the range of choice may be perceived as overwhelming for those who are needing to be more selective. One said,

‘I am happy as it is. I cannot afford many interesting events, but I find plenty to keep me interested and inspired.’

## National audience segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below, based on April 2023 data analysed at the national level. For more detail about these three demographic segments, head to the [National Key Findings](#).

Older and bolder	Family frugality	Young and restless
Arts audiences aged 55+	Arts audiences aged 35-55 with children living at home	Arts audiences under 35
<ul style="list-style-type: none"> <li>▶ After several years shaped by virus concerns and mask-wearing, older audiences are now enjoying higher attendance levels and spending.</li> <li>▶ As the most likely audiences to experience no barriers to attending right now, this group is open to a range of experiences and are the most likely to seek out challenging, topical works in the next 12 months.</li> <li>▶ Email is the top way they find out about events, so consider ways to continually improve your databases and eDMs.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Rising housing costs are affecting families more than households without children, and audiences with kids at home have reduced their arts spending more than others.</li> <li>▶ High numbers are staying closer to home, looking for free/cheap things to do and taking longer to commit, as they weigh up costs for 3 or more people.</li> <li>▶ Families see the arts as important for their children – and many are prioritising it within their budget.</li> <li>▶ For Kids and Family shows, consider a pricing and promotion strategy tailored to this group (they're the most likely group to find out about events on Facebook!).</li> </ul>	<ul style="list-style-type: none"> <li>▶ Despite being eager to get out and about, young people are attending at slightly lower levels than they did 12 months ago and are spending less too.</li> <li>▶ They're facing financial barriers at twice the rate of their parents' generations – and feel more down about their economic future.</li> <li>▶ They're eager to connect socially, attend fun/uplifting events and try new things they haven't experienced before, but may need support to attend.</li> <li>▶ Some are looking with keen eyes for student or youth discounts – and ways to cover the costs of travel and eating out.</li> </ul>

## What's next

To read about the story so far, visit the study's Australian homepage at: [www.thepatternmakers.com.au/covid19](http://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](mailto:info@thepatternmakers.com.au).

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