



PATTERNMAKERS

Audience Outlook Monitor

SA Audiences 2023+

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Subscribers and members are vital for many arts organisations, but their needs vary dramatically across audience segments in SA, presenting opportunities for SA organisations to adjust their packages to enhance the appeal for audiences.

Introduction

This report shares insights from over 800 South Australian arts and cultural audience members about their attendance in 2023 and beyond

Launched in May 2020, the Audience Outlook Monitor was established to track audience sentiment in relation to the COVID-19 pandemic. In 2023, it continues to provide insight into the top trends shaping audiences today, including the cost-of-living crisis, global uncertainty and the collective mood.

This South Australian (SA) Snapshot Report outlines key findings from Phase 9 (August 2023) of the Audience Outlook Monitor in Australia, based on data collected from 833 audience members living in SA.

The main source of data featured in this report is the Audience Outlook Monitor, a cross-sector, collaborative survey involving around 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

For more information about the survey process, and sample sizes, visit the Appendices.

This report compares the latest data with past Audience Outlook Monitor reports, to examine how things are changing over time – and identify opportunities for programming, marketing and strategy in the current conditions.

For questions, contact info@thepatternmakers.com.au.

1.

Attendance trajectories



1. Attendance Trajectories

Strong attendance rates persist across the country as audiences rebuild post-pandemic, and SA attendance remains consistent with 2022 levels. With a challenging year ahead, it's wise to set sights on the right targets.

Key points:

- While attendance had steadily increased since May 2020 both in SA, recent stability of SA attendance levels since March 2022 (76%) indicates a possible attendance plateau – and with 7 in 10 SA audience members expecting their attendance levels will stay the same in the next 12 months, major leaps in attendance appear unlikely.
- Australia-wide, strategic investment and programming shifts have helped many organisations sustain or increase their capacity in 2022 and 2023, but charting recovery is complex, with mixed attendance results.
- It's a good time to rethink what success looks like and adopt the right targets for the conditions.

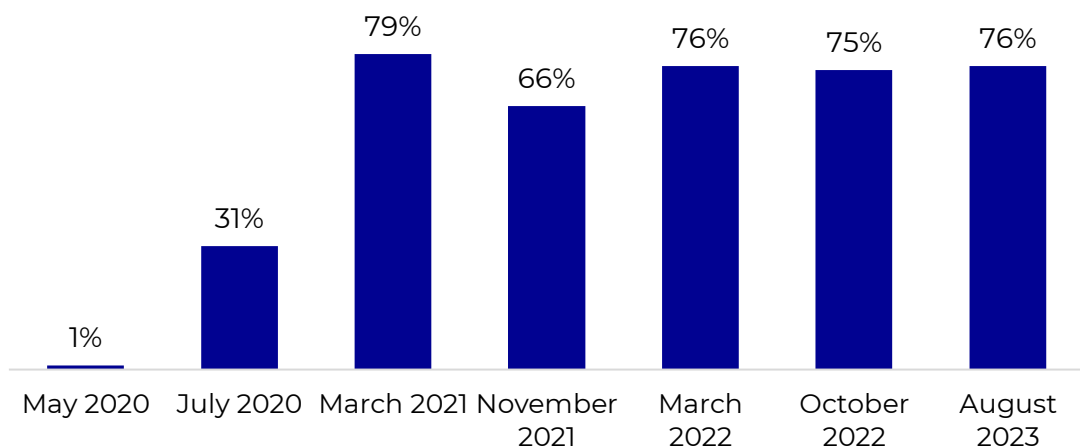
Attendance amongst SA audiences has remained high since March 2021, but there's more to the story

As the nation continues its recovery from the pandemic, SA audiences have gradually returned to attending cultural events in-person, with attendance reaching its highest point in March 2021 (79%) and remaining consistent at around 75% from then on.

In August 2023, 3 in 4 SA audience members say they attended a cultural activity in-person in the fortnight prior to data collection (76%), slightly below the national average (79%) and consistent with SA attendance in October 2022 (75%) and March 2022 (76%).

When comparing the results to other states, while still high, SA and Western Australia (WA) audiences were the least likely to have attended a cultural activity in-person in the fortnight prior to data collection (both 76%), while audiences from New South Wales (NSW) were the most likely (82%).

Figure 1: Proportion of SA respondents answering yes to 'In the past fortnight, did you do a cultural activity in-person (not online)?' May 2020 to August 2023 (SA audiences, n=833)



However, this overall participation rate only tells part of the story, with spending levels not growing alongside participation. There are also key differences in how various groups are attending and spending around the country:

- ▶ **Young and restless:** Audiences under 35 are attending frequently, but spending the least, with concerns about their economic outlook.

- ▶ **Family frugality:** Audiences aged 35-54 with children living at home were less likely to have attended a cultural activity in the last fortnight (72% nationally) and are managing pressures on family budgets.
- ▶ **Older and bolder:** Audiences over 55 are spending the most on cultural events right now, and their spending is growing.

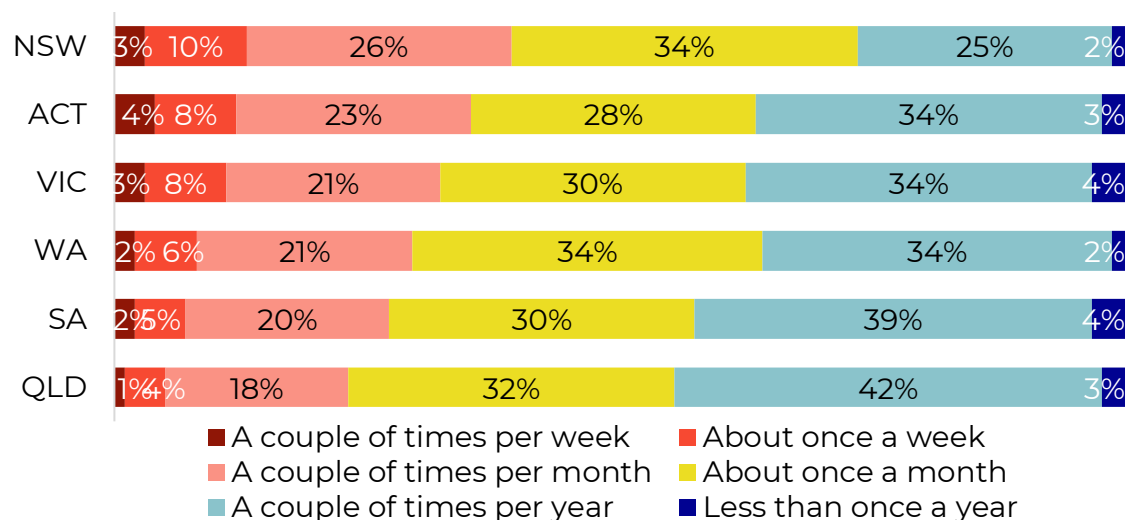
Although there will always be exceptions, understanding the major differences between these three groups is a helpful starting point, with a summary of these three national segments available in [Chapter 4](#) of this report (Segmented Approaches).

Among SA audiences, frequency of attendance is growing at performing arts venues and at museums and galleries

Amongst SA audiences, attendance frequency is gradually growing at performing arts events in August 2023, with 57% having attended at least once a month in August 2023, up from 53% in October 2022. However, this is still below the national average (65%), and is the second lowest in the country, ahead of QLD (55%).

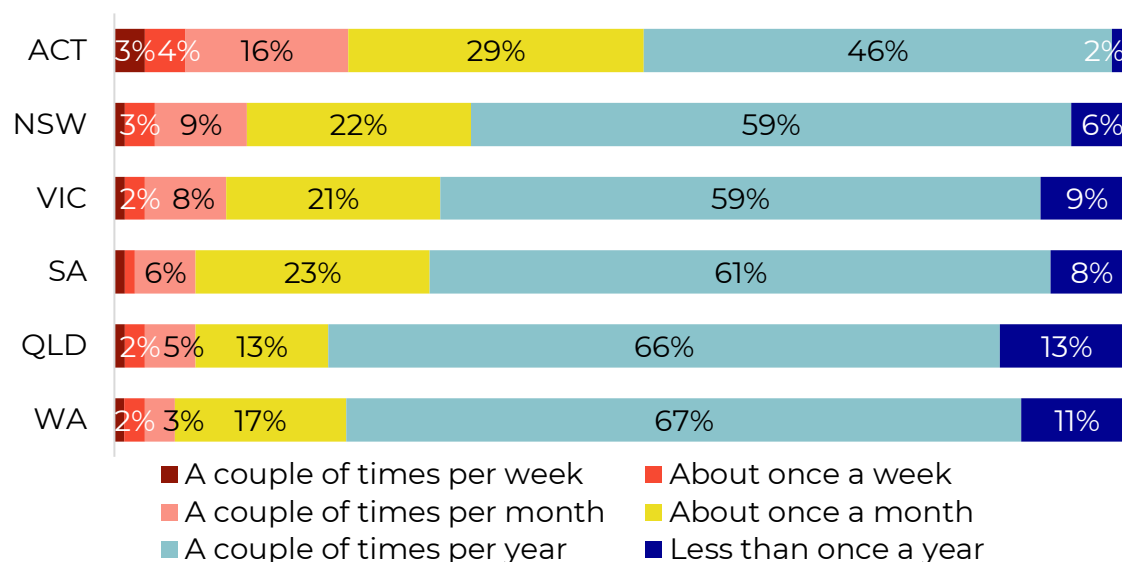
Meanwhile audiences in NSW are, on average, attending performing arts events the most frequently compared to other states, with 73% attending at least once a month in August 2023.

Figure 2: Attendance frequency at performing arts events by state or territory, August 2023. (SA audiences, n=785).



In SA, frequency of attendance at museums and galleries has also increased in August 2023, with 31% attending at least once a month, up from 24% in October 2022. This is consistent with the national average (32%).

Figure 3: Attendance frequency at museums and galleries by state or territory, August 2023. (SA audiences, n=576).



Across Australia, there is no one story for how organisations are recovering their audiences after the pandemic, but similar challenges exist

On a national level, although participation rates and frequency are trending in a positive direction, behaviour has not returned to pre-pandemic levels.

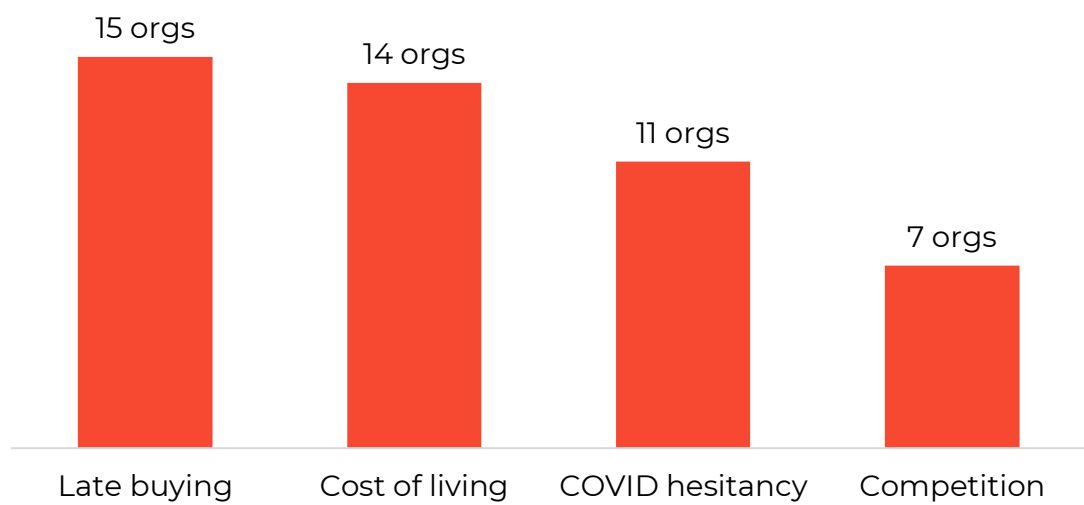
Arts organisations participating in the Audience Outlook Monitor were asked to provide attendance figures for 2019 and 2022, to compare how audiences have changed and to what extent the industry has rebuilt its audiences following the pandemic. They were also asked what their biggest challenges and successes have been. The following sections discuss the results at the national level.

52 organisations across the country responded to the benchmarking survey (including **5 SA organisations**), and their responses confirm the past few years have been challenging, with a range of factors impacting differently across the market. Some organisations have been

affected by natural disasters, while others are unscathed. 11 of the organisations were feeling the impact of COVID as their top challenge, while others were feeling different pressures.

While each reported unique circumstances, some shared similar challenges like last-minute ticket buying, cost of living concerns, COVID hesitancy and competition in the market.

Figure 4: Themes mentioned by organisations in response to ‘What’s been the biggest challenge, in terms of bringing audiences back?’ August 2023 (n=39)



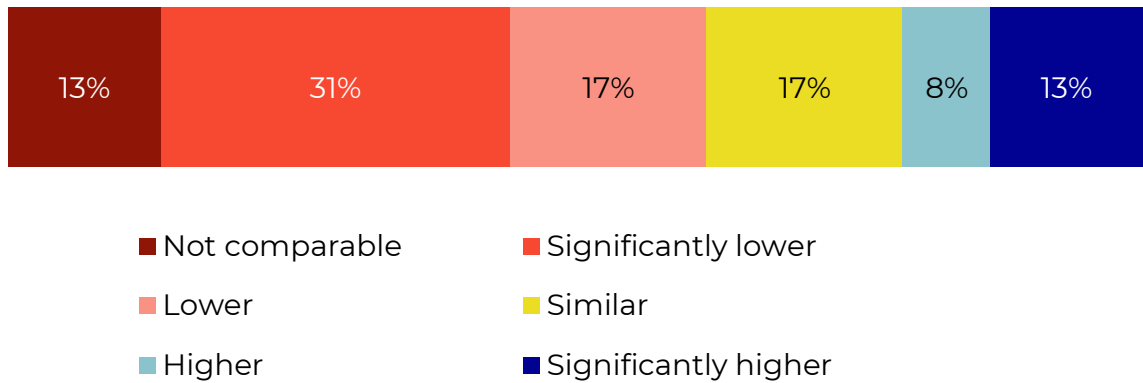
Organisations across Australia are adapting to the new landscape in different ways, and around 4 in 10 have rebuilt their audience to 2019 levels

Amongst the 52 organisations throughout Australia who provided responses about their attendance levels and events for 2019 and 2022, the picture is complex.

Comparisons are not always straightforward, but based on analysis of available data, it appears that around half of all organisations had lower (17%), or significantly lower (31%) audience numbers compared to 2019.

By 2022, some organisations had recovered their audience to similar levels to 2019 (17%) or grown them further (21%), but there is important context for what’s behind these numbers.

Figure 5: Quantitative audience recovery in organisations, August 2023 (n=52)



Some organisations are expanding their capacity or adapting their programming to reach new audiences, while others are stabilising or monitoring

Attendance numbers are influenced by changes in programming, capacity, funding and strategic shifts, so it's not always a fair comparison.

Organisations were placed into these categories by evaluating against the following four elements:

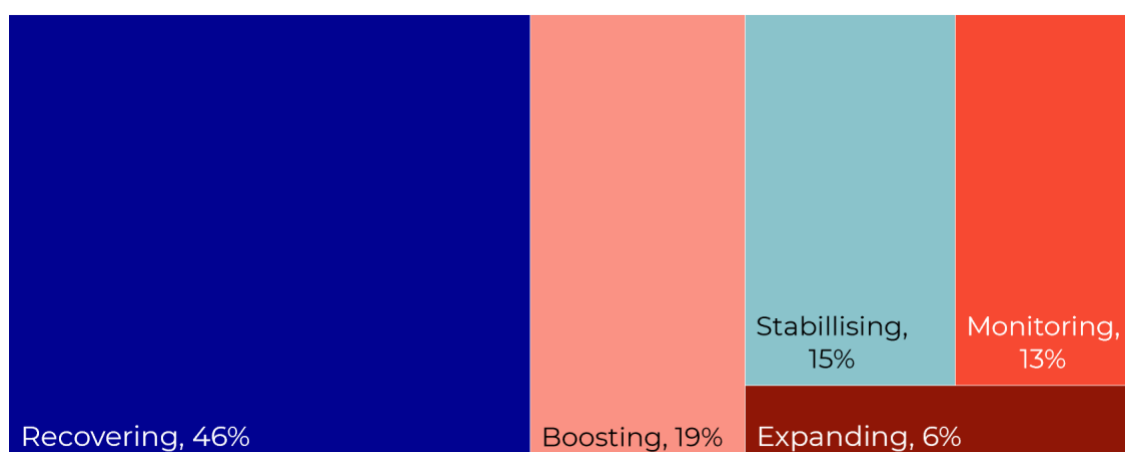
Audience recovery	Events and capacity	Programming	Organisational changes
Is total paid and free attendance higher or lower compared to 2019?	Has the number of events and tickets available changed?	Were there changes in approach to the types or genres of events?	Were there changes in funding or big strategic shifts?

Five different groups of organisations are apparent:

- **Expanding** organisations (6% of the total) are seeing the most positive trends, and were fortunate to have operations that involved outdoor locations, free/cheap events or confident audience segments during the upheavals (1 SA organisation)

- **Boosting** organisations (19%) have invested in new ways of working since the pandemic, increasing their capacity and attracting new audiences in the process
- **Stabilising** organisations (15%) show signs of returning to pre-pandemic levels, without dramatic changes in what they do (1 SA organisation)
- **Recovering** organisations (46%) had not regained their pre-pandemic audiences by 2022, and the next few years will be important, with strategic work involved (2 SA organisations)
- **Monitoring** organisations had non-comparable data, either due to inconsistent record-keeping or changes in personnel or ticketing systems and will be monitoring progress differently (1 SA organisation).

Figure 6: Categories of recovery in organisations, August 2023 (n=52)



***Expanding* organisations reached much larger audiences, sometimes due to being ‘in the right place at the right time’**

Audience recovery	Events and capacity	Programming	Organisational changes
Increased beyond 2019 levels by more than 30%	Similar events and capacity	Benefitted from having outdoor venues, free/cheap events or confident audience segments	Leaning into their core business, and/or undertaking some adaptive work, showing signs of sustainability

6% of organisations were classified as ‘expanding’, demonstrating significantly larger audiences in 2022 relative to 2019 without drastic changes to programming.

One expanding SA organisation noted:

‘During COVID, we were able to pivot and engage audiences digitally through pre-existing screen content which continued our engagement with our audiences and kept us connected to them.’ (Producer, metropolitan SA)

***Boosting* organisations gained new audiences by increasing their programming, event capacity or touring**

Audience recovery	Events and capacity	Programming	Organisational changes
Increased beyond 2019 levels	More events with more tickets available	‘Blockbuster’ style programming, and leveraging international acts	Putting the hard work into attracting new audiences

19% of organisations were classified as ‘boosting’, reporting that activities such as programming blockbuster events, international acts, or (for some key producing organisations) ramping up their own touring have led to strong attendance recovery trajectories.

6 in 10 boosting organisations were performing arts venues, suggesting that some venues may have more ability to leverage audience-building programming opportunities, compared to some other organisation types.

Supply was also a common theme, with all boosting organisations reporting that they’ve increased the number of paid and/or free events since 2019.

All boosting organisations noted changes in programming. Popular events like international acts, or light-hearted content were cited as factors in attendance recovery.

One manifestation of the increased supply generated by boosting organisations is **more competition, which some organisations mentioned** as a challenge facing them at the moment.

While celebrating a successful recovery, boosting organisations are also having conversations around sustainability, and how to retain the new audiences they have attracted.

***Stabilising* organisations showed signs of returning to pre-pandemic levels, without dramatic changes in what they do**

Audience recovery	Events and capacity	Programming	Organisational changes
Varied – within +/-15% of 2019 levels	Similar to 2019	Similar to 2019	Similar to 2019

15% of organisations were classified as 'stabilising', and based on their numbers and stories, they appear to be serving audiences in similar ways compared to 2019, and at a similar volume.

These organisations have not dramatically increased their capacity or changed their programs, and yet have seen the rebuilding of audiences back up to the levels seen pre-pandemic. 3 in 4 stabilising organisations were **producers**.

One SA organisation was categorised as stabilising, citing its biggest success in bringing audiences back as 'achieving box office targets and audience number targets despite a still cautious audience.' (Producer, Metropolitan SA)

***Recovering* organisations throughout Australia had not regained their pre-pandemic audiences by 2022, and the next few years will be important**

Audience recovery	Events and capacity	Programming	Organisational changes
Attendances in 2022 were	Varied – may be less events, or	Similar to 2019	Similar to 2019

significantly lower than 2019 levels	similar events but with less audiences
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46% of organisations were classified as ‘recovering’, due to having lower or significantly lower audiences in 2022 relative to 2019.

The ‘recovering’ classification was more common in medium to large organisations, with 70% large organisations (200+ staff) and 46% of medium (20-199 staff) in this category. 3 of the 4 galleries and museums that responded were ‘recovering’, whilst one was ‘stabilising’.

30% of recovering organisations mentioned **cost of living** and 39% mentioned **late-buying ticket cycles** as a barrier to recovery. Some noted the impact of sustained uncertainty and changing audience behaviours, with one SA organisation saying:

‘Rolling uncertainty about shutdowns, followed by inflationary pressures. It's been a double hit to a fragile audience segment that has simultaneously discovered the benefits of streaming services.’ (Peak body, regional SA)

A number of the recovering organisations say that so far, 2023 is looking more positive, and in a year’s time this benchmarking exercise could see them join the ‘stabilising’ group.

However, as uncertainty in the market continues, the next few years will be critical in determining the trajectory of attendances and whether there is need for strategic changes.

In SA, big increases in attendance appear unlikely over the next 12 months, with 7 in 10 predicting their attendance will stay the same

In October 2022, almost half of SA respondents to the Audience Outlook Monitor (46%) said their current level of attendance would ‘definitely’ or ‘likely’ increase over the following year. In August 2023, that proportion dropped to 1 in 5 respondents (22%), while 70% said they expect that their current level of attendance at cultural events will stay ‘about the same’.



This trend is consistent throughout the states and territories, with fewer audiences in August 2023 expecting their attendance will likely or definitely increase moving forward, compared to October 2022. On a national level, in August 2023, 66% of audiences expect their attendance will stay the same, while 27% expect it will 'definitely' or 'likely' increase.

Inflationary pressures are impacting household budgets, ultimately affecting attendance decisions and frequency. Major changes appear unlikely for at least 12-18 months, with the Reserve Bank of Australia (RBA) [predicting inflation to return to the target range by late 2025](#) – a topic covered in depth in the next chapter.

Things to think about when charting attendance trajectories:

Frequency is up and attendances are consistent in SA, but the situation is complex, and growth in attendance volume could be limited in the next 12 months.

Here are some things for SA organisations to consider:

- ❑ Manage stakeholder expectations around attendance recovery, emphasising that there are many stories of recovery out there and no 'one size fits all' approach
- ❑ Consider investing in ways to improve the accuracy and consistency of how attendance is measured and tracked over time, so it can inform your decisions
- ❑ Make space for internal reflection and interpretation of actual attendance data, including what may be behind changes, to build organisational knowledge
- ❑ There is a case to review attendance and engagement targets for the next 12 to 18 months – bearing in mind that economic conditions are limiting growth in attendance and that habits take time to change
- ❑ Ensure that attendance isn't your only measure of success, and consider other ways to track engagement and impact
- ❑ Find opportunities to share knowledge with your peers about what's working, what's a struggle and how you're evolving your work around audience needs
- ❑ Consider joining (or forming) cross-organisational working groups and networks around key topics, where there is opportunity to share learnings and push the industry forward
- ❑ Stay abreast of local population changes which could affect attendance – such as [projected increases to the 'older population' from 2021-51](#).

2.

Inflationary pressures and pricing



2. Inflationary pressures and pricing

Financial barriers are impacting SA audiences and what they can spend on events, and some segments need targeted thinking to ensure access to arts and culture.

Key points:

- Financial reasons are the top barrier to attendance facing SA audiences, and inflationary pressures are expected to continue in 2023-24.
- Many SA audiences are feeling pessimistic about their current and future financial positions, consistent with national trends.
- Spending levels at arts and culture events have increased slightly, but many SA audiences are weighing up value for money and taking longer to make decisions.
- With younger SA audiences and families continuing to be the most impacted, a key opportunity is developing sustainable strategies for targeting disadvantaged segments.

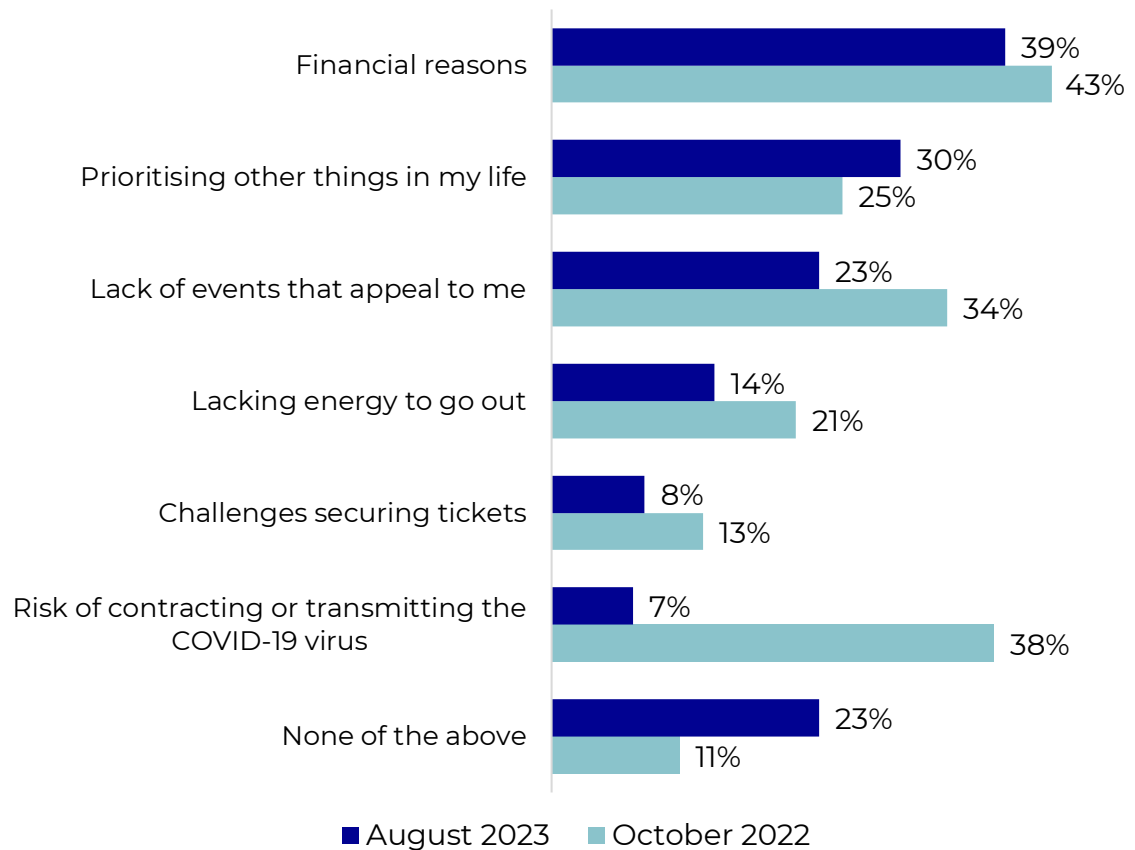
Financial reasons remain the top barrier to attendance, impacting 4 in 10 SA audience members

Consistent with previous results from October 2022, the August 2023 results show that financial reasons are the most prevalent barrier to attendance among SA audiences (39%). This is followed by audiences 'prioritising other things' in their lives (30%) and a perceived lack of appealing events (23%).

Comparing different states and territories, SA audiences are among the most likely to cite financial barriers, just after QLD (42%) and VIC audiences (41%).

After 3 long years of pandemic, fears of contracting or transmitting COVID have decreased among SA audiences, with just 7% citing it as a barrier to attendance in August 2023, down from 38% in October 2022.

Figure 7: 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, August 2023 (n=829) and October 2022 (n=697).



SA audiences are spending slightly more than they were in October 2022 – but national spending levels aren't growing, with consumer confidence low in August 2023

Although the proportion of SA audiences attending in-person cultural events has stayed the same, their spending levels have increased slightly compared to October 2022.

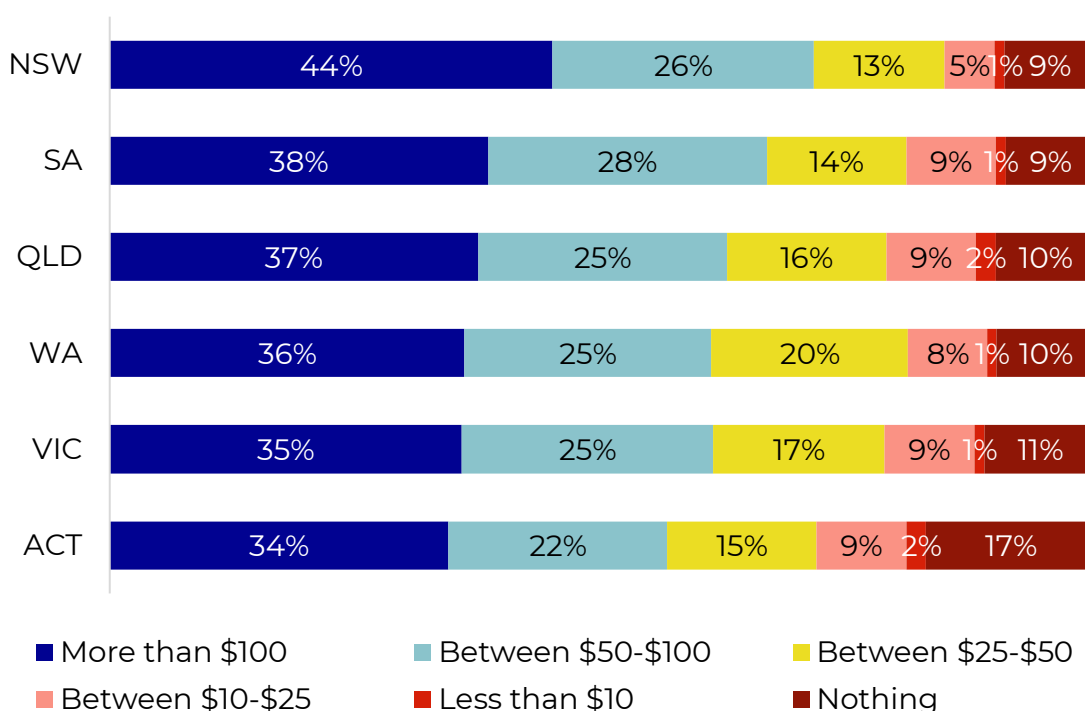
In August 2023, 66% of those attending in SA spent \$50 or more on tickets to in-person live events and cultural activities, up from October 2022 (60%). This rate is lower than NSW audiences (70%) and consistent with the national average (64%) (Figure 8).

Nationally, spending levels in August 2023 have not increased since October 2022, with 63% spending more than \$50 on tickets to in-person live events and cultural activities in the fortnight prior to data collection (compared to 64% in August 2023).

The latest [ANZ-Roy Morgan Australian Consumer Confidence](#) survey reported on 8 August 2023 shows that across all mainland states 'confidence has been in very weak territory for 23 consecutive weeks, the longest weak streak on record.' Sharp increases to inflation have heightened cost of living pressures amongst SA households, leading to weaker household consumption levels – with economic growth [forecasted by the State Government](#) to be 1.0% in 2023-24, compared to 5.1% in 2021-22 (actual).

Spending levels vary slightly between age groups (see [Segmented approaches](#) for further information).

Figure 8: In the past fortnight, how much did you spend on tickets to in person live events and cultural activities? By state (SA audiences, n=616)



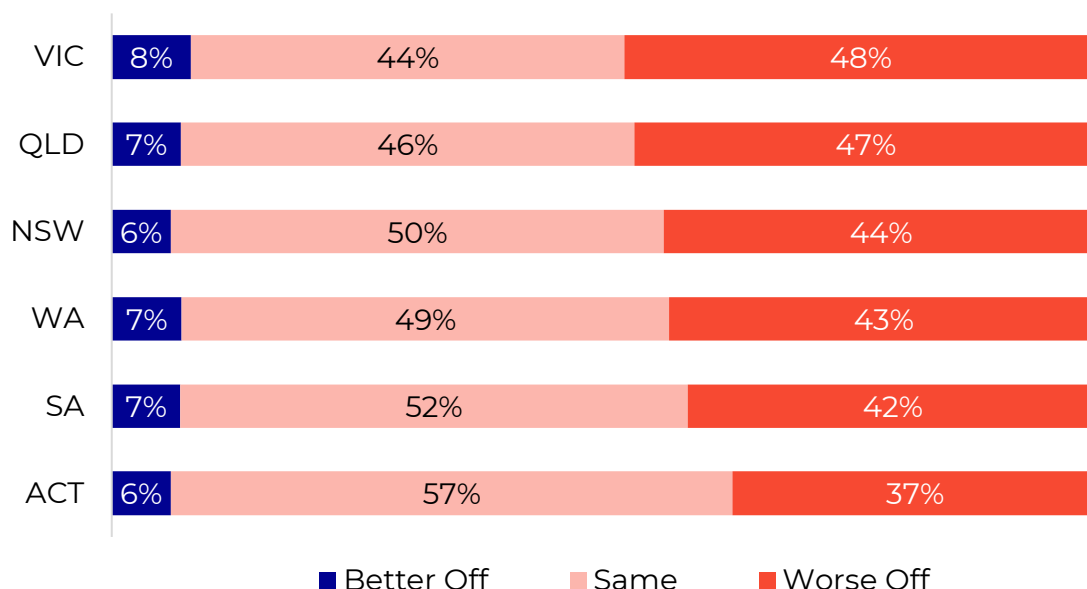
4 in 10 SA audiences said they are financially 'worse off' compared to one year ago, and just 7% say they're better off

In August 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?'

Overall, 4 in 10 of SA audiences say they are 'worse off' (42%), while another 52% say they are the 'same' as one year ago. Only 7% overall report that they are 'better off' – on par with national averages (Figure 9).

Comparing the results by state/territory, the proportion of SA audiences saying they are 'worse off' now compared to a year ago was slightly below the national average (45%). Audiences in the ACT (37%) were least likely to be feeling 'worse off' right now, while audiences in VIC were the most likely (48%).

Figure 9: Would you say that you (and any family living with you) are better off or worse off financially than you were a year ago? By state or territory of respondent, August 2023 (SA audiences, n=822)



SA audiences are thinking carefully about value for money in balancing their desire to attend and the associated costs

Qualitative data from SA audience members suggests that many are attending cultural activities, but are seeking out options to spend less, for example, through discounted ticketing offers or keeping an eye out for free or low-cost events in their area. One said,

'Definitely thinking more carefully about where and how I spend. Also looking for special offers, discounted multibuy tickets or discount for early purchase and trying to avail of those offers.' (55-64, SA)

Many SA audiences mentioned careful deliberation around value for money, sharing,

'We didn't spend money seeing Illuminate events but did check out the free exhibitions at North Terrace. We have certainly discussed 'value for money' when booking cultural events.' (65-74, SA)

'It is about price in that there needs to be value for money. I am less interested in big names as solid performers at a theatre that is easy to get to with decent facilities.' (65-74, SA)

Despite their love for arts and culture, others are having to re-evaluate or forgo attending altogether, in light of cost-of-living pressures. SA audiences shared,

'Live theatre is my favourite, but it is sooo expensive. Most of my friends (30s, decent jobs) can't justify the price. Especially as they've seen fairly mediocre stuff in the past and it's turned them off. I wish theatre had more accessible prices - \$80 is too much for most people. Especially if theatre wants to attract new audiences.' (35-54, SA)

'Everyone knows the cost of living has increased. Unlike others I'm not prepared to go into debt to enjoy life, [and] this means cutting down on unnecessary expenses. I look for family events that cost less than \$50 or less than \$100 in special/rare circumstances/performances; this generally means we don't go out much anymore because it is hard to find options that fit within these costs.' (35-54, SA)

Compared to other states and territories, SA audiences are feeling slightly more pessimistic about their future financial circumstances

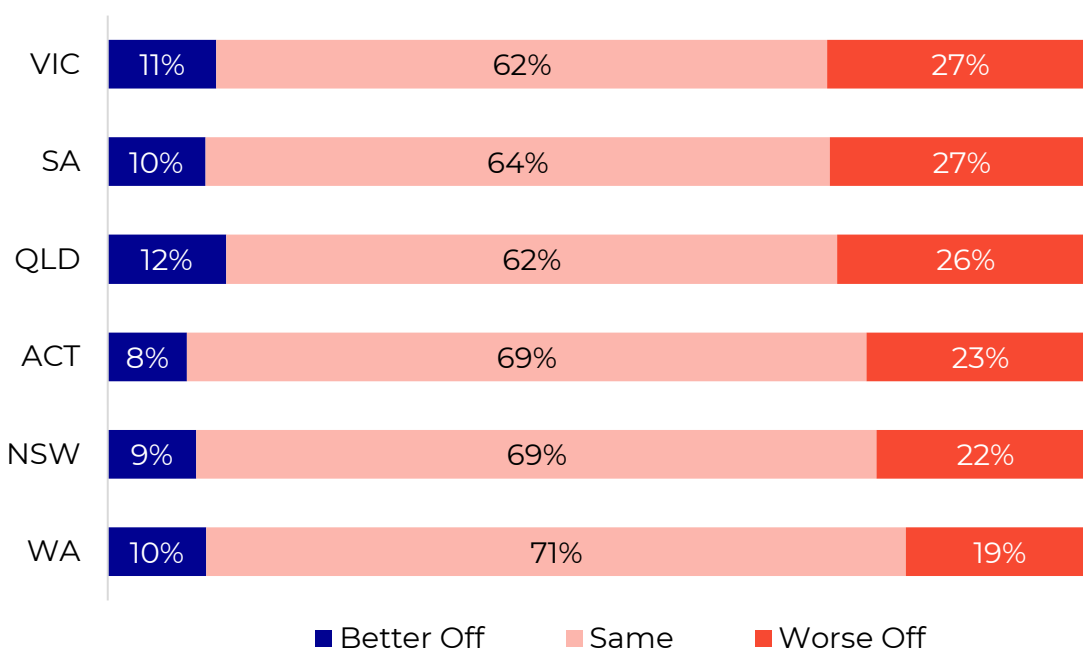
Audiences were also asked: 'Now looking ahead – do you think that a year from now you (and any family living with you) will be better off financially, or worse off, or just the same as now?'

Two-thirds (64%) of SA audiences say they expect to be in the 'same' financial position a year from now, while 27% expect to be 'worse off'. One in 10 (10%) expect to be 'better off' (Figure 10).

SA audiences are the most likely of all states to be feeling that their financial position will be 'worse off' in the coming year, alongside VIC (both 27%). Meanwhile, this rate is lowest among WA audiences (19%).

Audiences are impacted differently in terms of their economic outlook, and under 35s and families are the most likely to feel pessimistic at the moment. See the [Segmented approaches](#) to read more about these trends at the national level.

Figure 10: Now looking ahead – 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 the same as now? By state or territory, August 2023 (SA audiences, n=774)



Around half of SA audiences are looking for cheap things to do – but 43% are also ‘splashing out’ or ‘splurging’

Audiences were asked about the ways in which their attendance behaviour has been affected by their financial situation at the moment.

Just over half of SA audiences (53% agree or strongly agree) said that they have been ‘looking for things that are free/cheap to do,’ – consistent with the national average (55%) (Figure 11). One said,

‘I seek out free events/activities or buy tickets for previews sessions of plays or dance, or even enter competitions for freebies, though not much luck lately..’ (55-64, SA).

However, 43% of SA audiences are also finding things to ‘splash out’ or ‘splurge’ on – suggesting that SA audiences are willing to spend more

on things they love and ‘make a night of it’, while saving elsewhere. One said the last thing they attended was,

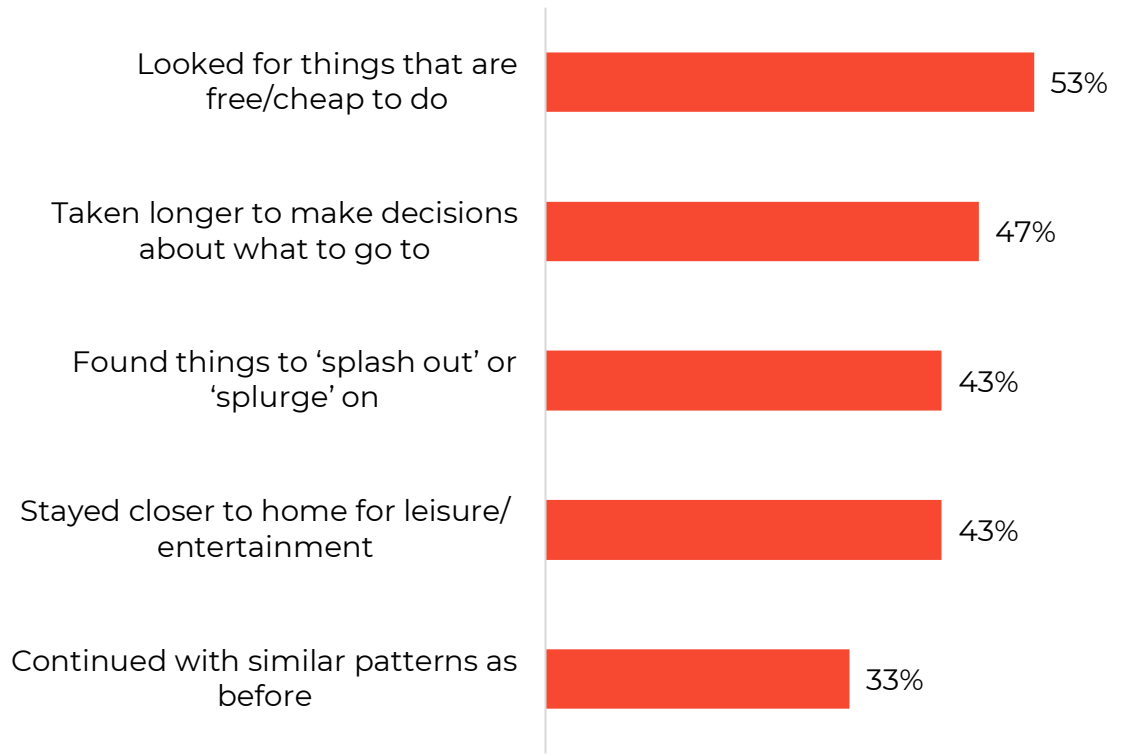
‘Stand-up comedy, I purchased the tickets in July 2022! She is very well known, very funny and it was an excuse for a night out. We paid for parking, had dinner, had dessert, drinks then the show.’ (Under 35, SA)

With many being less able to attend as frequently as they want to, they are being selective about what they attend and where they ‘splash out’, weighing up perceived quality and value for money. One said,

‘I’ve just reduced the amount of things I can [go to] now. I still look for the same, I just do less. I live regionally and it’s likely I’ll be selective. The Fringe is too expensive and lacks value for money now. I would rather do less and spend on quality like at the Adelaide Festival, but I will either not go at all or only spend 2 nights because accommodation now is really expensive.’ (Age unknown, SA)

Nearly half (47%) are deliberating longer on their decisions to attend, and 43% of SA audiences are also staying closer to home. SA audiences are less likely to have continued with similar patterns as before (33%), relative to other behaviours, though this is slightly higher than the national average (28%), mirroring SA’s stable attendance levels.

Figure 11: Given my financial situation, in the past 6 months, I have... (strongly agree and agree). SA audiences, August 2023 (n=822)



The cost of tickets is only part of the equation, with SA audiences also factoring in travel costs, parking and food

For many SA audiences, the additional travel costs are compounding the financial barriers affecting their attendance. For some, accumulative travel costs can be prohibitive. One said,

'Money is definitely an issue. I love live performance and like to support Australian performers, but I do look for what I consider to be value for money... I think arts organisations sometimes forget that when you are purchasing tickets to a show, you usually purchase two (taking a partner or a friend or whatever) then there is transport/parking, maybe a drink beforehand...

... If tickets are close to \$100 each, sometimes a night out can look like a \$300-\$400 exercise. I am in a relatively comfortable position in life, but I consider that an excessive amount for a night out, especially if an arts organisation thinks I am going to do that 4 or 5 times a year.' (55-64, SA)

Qualitative data suggests this is especially a consideration for those living in regional areas. One respondent said,

'We are a reasonable distance from large towns and cities therefore major events so need to add petrol and often accommodation costs.' (65-74, SA)

One shared a suggestion around sponsored transport to and from regional areas, saying,

'The ASO had a great deal with one of its sponsors who ran a free bus from my area which was very attractive. I would happily have paid \$20 but it was free.' (75+, SA)

Some mentioned a lack of the types of events they're looking for in SA, meaning they have to weigh up the additional costs of travelling interstate. One shared,

'Unfortunately, many artists, events, shows, ballets do not come to SA. So, if you would like to see something one needs to add travel and accommodation costs which makes it difficult.' (55-64, SA)

Another said

'Adelaide still doesn't get big Broadway musicals like Sydney or Melbourne, and I used to travel out east for those kinds of shows, but now I am trying to save my money more.' (35-44, SA)

Due to the cost of travel, some respondents mentioned they are opting to attend more local productions to keep costs down, as one said,

'We are definitely not travelling to cities and spending money on accommodation, food and travel for arts and culture. We are willing to spend money in our local community to attend shows / events locally though.' (35-54, SA)

Younger audiences and families continue to be the most impacted by financial barriers

Across all age groups, financial barriers taking effect; however, among key national audience segments, young people and families are the most impacted at the moment.

Qualitative data shows that **under 35s** in SA are eager to attend cultural events but are feeling the pinch in the cost-of-living crisis – ultimately inhibiting their ability to attend. One said,

‘Unfortunately, I think it's the same for everyone at the moment. We have great shows, events, films and all that available to us now post-COVID, but with cost of living increasing, talking yourself into splurging on tickets is tricky. I don't think there's an easy solution here.’ (Under 35, SA)

Another shared,

‘With the rising of inflation, we as a family have had to consider what we do and don't go to, to keep track of our finances.’ (Under 35, SA)

Meanwhile, responses from **parents aged 35-54** shared similar sentiments, despite many being eager to attend family events. One shared,

‘We would love to go see Mary Poppins at the Festival Theatre but with the rising cost of living, we simply can't afford to travel and pay for tickets for our family. It's a shame as we love attending these shows (such as Dolly Parton's 9 to 5) in the past. Unfortunately, the tickets price of such events prices many people out of attending them.’ (35-54, SA)

Another said,

‘The Arts in particular still remain very expensive. Particularly children's theatre where typically the whole family come. The Arts will start to lose their new audiences if they start pricing out the majority.’ (35-54, SA)



"Unfortunately, I think it's the same for everyone at the moment.

We have great shows, events, films and all that available to us now post-COVID, but with cost of living increasing, talking yourself into splurging on tickets is tricky. I don't think there's an easy solution here."

Audience member
Under 35, SA



Things to think about when addressing financial barriers to attendance

SA audiences are feeling the pinch when weighing up the costs of attending cultural events – though across the nation, some are more disadvantaged than others.

Here are some things for SA organisations to consider:

- ❑ Prioritise discussions around meaningfully building future audiences, and consider whether you have the right strategies in place to meet this generational challenge
- ❑ Consider new ways to cross-subsidise events in programs and/or seek funding and partnerships to enable greater discounts and opportunities for financially disadvantaged segments
- ❑ Draw on data about how different segments are affected in SA when assessing the case for funding in grant, partnership and sponsorship applications.
- ❑ Review the level of discounts offered for younger people and concession pricing in relation to the level of disadvantage they experience – and for families in SA too
- ❑ Try to avoid last-minute ticket discounts and think ahead about strategic offers that can realistically be maintained longer-term, to build consistency, clarity and trust with audiences
- ❑ With many SA audiences deterred by travel and accommodation costs, consider packaging of tickets with food, drink and travel options, and/or partnerships with local vendors and businesses, where nearby options and offers could be cross promoted to audiences
- ❑ Spread awareness about travel initiatives that could help audiences get to your event, such as [free city buses and trams and on-demand regional bus services](#), or consider opportunities to engage sponsored transport to assist those living regional areas.

3.

The desire to inspire



3. The desire to inspire

Amidst a challenging outlook, SA audiences are in the mood for uplifting experiences – requiring organisations to think creatively about affecting meaning and building trust in difficult times.

Key points:

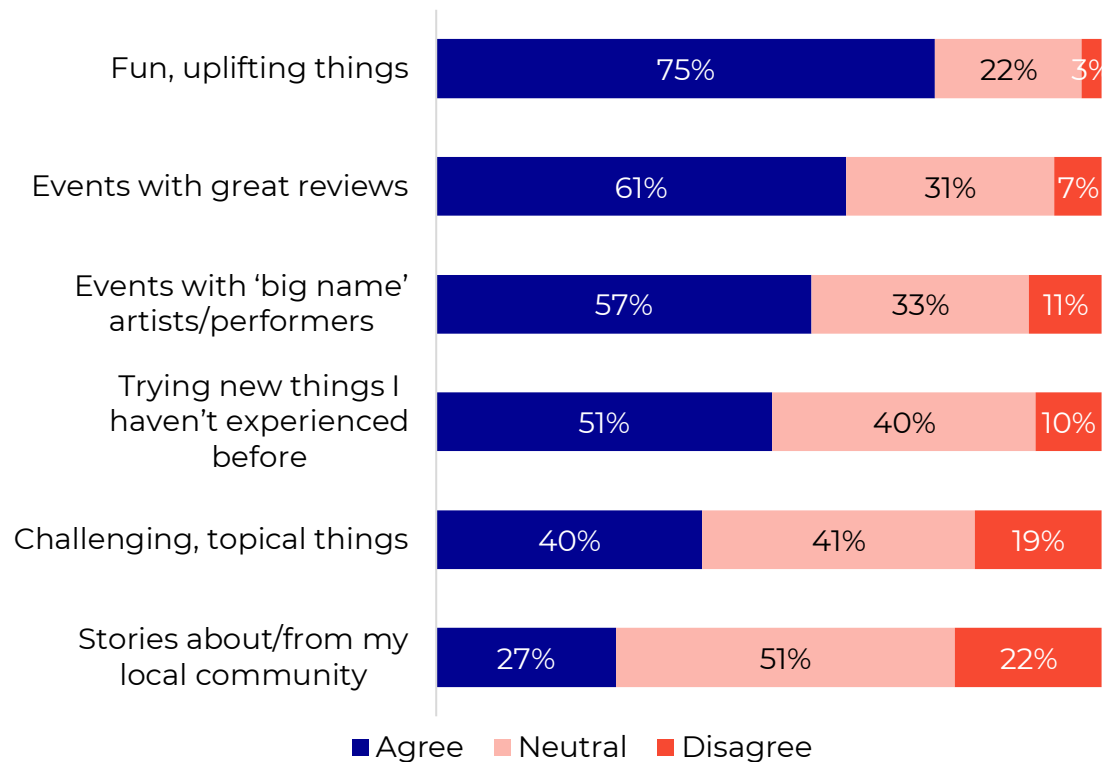
- SA audiences are finding a wide range of content appealing, though budget pressures are leading some audiences towards ‘safer’ bets or ‘guaranteed fun’.
- High proportions of SA audiences are seeking out fun, uplifting experiences and events with great reviews to ensure value for money.
- Audiences want a more diverse and accessible arts scene in SA and want to ensure it continues to expand and appeals to a greater range of audiences.
- Organisations that understand the mood can please crowds today while building trust for tomorrow.

SA audiences are interested in a wide range of content, though budget pressures are leading some towards 'safer' bets

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

The results show significant appetite amongst SA audiences for all options tested, including fun, uplifting things (75%), events with great reviews (61%), and events with 'big name' artists/performers (57%).

Figure 12: In the coming year, I'll be most attracted to... August 2023 (SA audiences, n=821)



SA audiences are eager for uplifting and inclusive arts experiences – which offer reprieve in challenging times

In the August 2023 survey, audiences were asked, 'What else do you think arts and cultural organisations should be aware of about Australian audiences at this time?'

Responses suggest that many audiences whose wellbeing has been affected by the cost-of-living crisis and other challenges in the wake of the pandemic appear to be more likely to seek this reprieve. Many are looking for lighter works which provide opportunities for escapism, as one said,

‘People want light-hearted/comedy events. Life is so busy & serious. We want to relax & unwind.’ (35-54, SA)

Another shared,

‘It is wonderful to view and participate in uplifting, entertaining experiences when the world is challenging. It’s also great when there are family friendly activities on offer.’ (35-54, SA)

Another suggested that current audience tastes are following old patterns, sharing,

‘Like in any depression era, shows that are funny or take on the fantastical will be most popular.’ (55-64, SA).

Although 51% say they’ll be drawn to things they haven’t experienced before, some audiences may be taking less risks in the face of challenging conditions. One respondent shared,

‘I am a little more careful about what I see because of the cost. Previously I would have jumped into lots of shows whether they were my favourite type or not but now I am looking for only those that I know I will enjoy. I don't want to feel I have wasted my money.’ (65-74, SA)

There is appetite for a diverse and vibrant arts scene in SA and many want it to continue growing

SA audiences highly value the arts, and despite challenges in attendance for many, they want to see the local arts scene continue to flourish. One respondent shared,

‘I think it’s really important that governments understand how important the arts are to the community, and how they contribute to wellbeing and the economy. It is harder for audiences to support arts organisations at present but that

doesn't mean they are any less valued or critical to our society.'
(55-64, SA).

Some SA audiences mention a perceived lack of events that appeal to them in their area and want to see more variety and diversity. One said,

'Audiences like a variety of quality, affordable priced events. Cultural organisations should be aware as they no doubt already are that they are always competing for the leisure dollar and in tighter economic time such as now.' (Age 55-64, SA)

Another said,

'We want to see stories that properly reflect us... Let's explore what it is to be here, in Australia, now. That means diverse work, new work, challenging work. Enough of playing it safe. Also set prices we can afford. I said it earlier, but \$80 for an adult theatre ticket is too much for most people. The audience is dying or being priced out.' (35-54, SA)

Audiences also noted their desire for more touring to Adelaide, as well as regional communities, to increase the variety and accessibility of events available. One stated,

'More artists should include Adelaide, and not just the eastern states.' (55-64, SA)

Another said,

'Arts need to travel to regional/rural communities in Australia more as it is very difficult and expensive for many to travel to the cities. I would have gone to a lot more events if they had been closer to home.' (Age unknown, SA)

Alongside this desire for touring, many audiences in SA want their local areas to be showcased. One said,

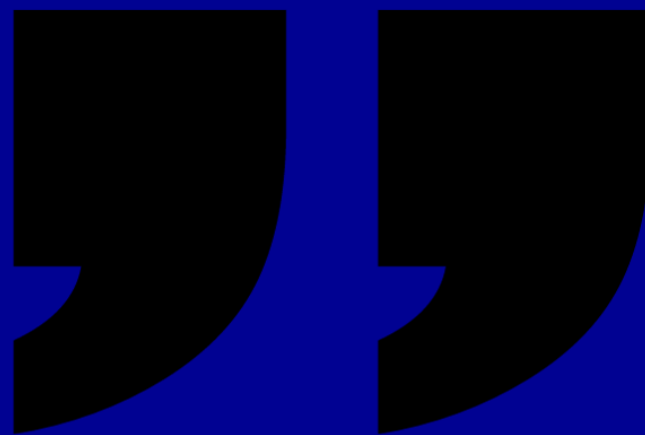
'Because of our remoteness from much of the world, we benefit from experiencing visiting international art and performances. It's equally important to foster and support local creativity, culture and artistic pursuit. I particularly like collaborations between international & Australian arts.' (age unknown, SA)



"I think it's really important that governments understand how important the arts are to the community, and how they contribute to wellbeing and the economy.

It is harder for audiences to support arts organisations at present but that doesn't mean they are any less valued or critical to our society."

Audience member
55-64, SA



Things to think about when making creative and programming decisions

While SA audiences are becoming more selective about what they choose to attend, there is strong desire for a wide range of content.

Here are some things for SA organisations to consider:

- ❑ Events can be fun and uplifting while still pushing boundaries and affecting meaning around contemporary issues – so look for ways to present new, topical and challenging ideas in different ways for audiences
- ❑ With many SA audiences reliant on reviews, consider complementary ways to build trust, such as reposting audience shares and enabling functionality for audiences to leave reviews or ratings on websites or social media (also a great audience development exercise!)
- ❑ Many SA audiences members are looking for balances between classical and new, local and international, emerging and ‘big name’ – so creating variety in programming will appeal to diverse audiences, particularly in more regional areas. One SA respondent shared: ‘Audiences are changing in the country areas and there is a need for variety so that we keep all ages groups interested and attending.’
- ❑ Discuss the right level of investment in strategies for reaching new audiences and retaining them long-term. Sometimes, resources are better spent with targeting a specific group of interest with an event.

4.

Three segments to know



Image Credit: Samuel Graves, courtesy of Adelaide Fringe.

4. Three segments to know across Australia


















Across Australia, younger audiences, families and older audiences are thinking and behaving very differently in 2023, and organisations must build capacity for new ways of working.

Key points:

- National results demonstrate that local and economic pressures are impacting different generations in different ways. This is available in three key segments, summarised overleaf, and available to read in full in the [Audiences 2023+report](#).
- Differences in mood, entertainment priorities, spending patterns and media consumption present a case for SA organisations to consider how to create and execute strategies for different segments and build in flexibility to adapt as conditions evolve.

Summary of key segments

Inflationary pressures are experienced differently across the population. Three key audience segments are presented below.

	Young and restless	Family frugality	Older and bolder
	Arts audiences under 35	Arts audiences aged 35-54 with children living at home	Arts audiences aged 55+
Attending cultural events	 84%	 72%	 79%
Feeling pessimistic about the future	 28%	 29%	 22%
Spending \$50+ on in-person events	 48%	 50%	 67%
Attracted to fun, uplifting content	 85%	 88%	 72%
Attracted to challenging, topical things	 45%	 36%	 46%
Seeing a role for digital in their lives	 58%	 47%	 66%
Top awareness channel	Word-of-mouth (54%)	Websites & word-of-mouth (39%)	Email from an arts org (50%)
Top motivator for subscriptions and memberships	Accessing discounted tickets (42%)	Accessing discounted tickets (45%)	Locking in plans early (28%)

Things to think about in serving different segments

The pandemic created social issues that affected different people in different ways. Right now, inflationary pressures are also being experienced differently across different audience segments.

Here are some things for SA organisations to consider:

- ❑ Consider whether your organisation is across the different trends taking place and has insights to inform tailored approaches
- ❑ Review organisational capacity for targeted approaches since different segments require very different thinking. Consider things like organisational structures, skills needed internally, workflows, data and software needed for successful targeting
- ❑ For those marketing events, reflect on whether the pressures of reaching short-term attendance/sales targets is inhibiting strategic work required for long-term audience development
- ❑ Consider all elements of audience experience in marketing strategy, and look at ways to build trust, loyalty and engagement in the short, medium and long-term
- ❑ Take time to clean, update and tag your database to maximise the potential for targeted campaigns and optimise open rates.

5.

Online trends



5. Online trends

SA audiences continue to engage online, and in 2023, online content is helping audiences find out about events, discover new artists and participate in digital experiences.

Key points:

- Digital channels are paramount to audience engagement – with three-quarters of recent SA attendees finding out about arts and culture events online.
- Preferred platforms look very different across age groups: email marketing is the priority for 55+, while word-of-mouth and socials are key for younger audiences.
- One-third of SA audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives, despite the proportion paying for online experiences decreasing.
- It might be time to review online offerings, scrapping what's not working and freeing up resources for more targeted approaches.

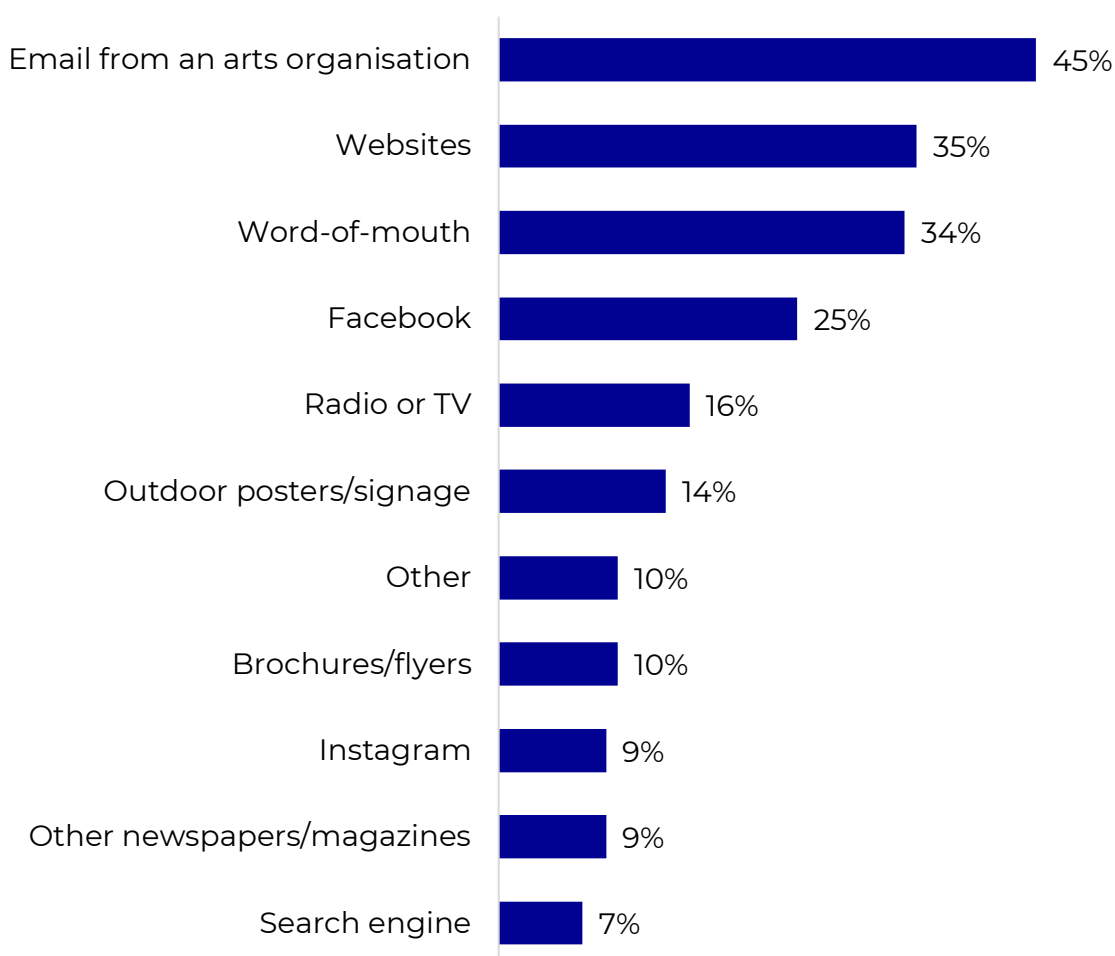
Key channels for SA audiences are emails from arts organisations, word-of-mouth and websites

When asked how they heard about the most recent event or cultural activity they attended, overall, SA audiences cited online channels (76%), consistent with the national rate (75%). This includes direct emails from arts organisations (45%) and websites (35%) (Figure 13).

One-third of SA audiences are relying on word-of-mouth from friends, family or colleagues (34%) – consistent with the national average (35%). VIC and WA audiences are currently more likely to be relying on word-of-mouth (both 38%) compared to other states like NSW and QLD (both 32%).

SA audiences are also relying on social media, such as Facebook (25%) and Instagram (9%). These figures could be even higher, assuming a proportion of word-of-mouth occurs online.

Figure 13: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). August 2023 (SA audiences, n=632)



SA audiences of all age groups are using online channels – and word-of-mouth is key for over half of under 35s

For SA over 55s, the dominant awareness channel is emails from arts organisations, followed by websites and word-of-mouth – consistent with national trends (Figure 14).

While audiences are hearing about cultural activities and events via email, some mentioned missing emails or difficulty navigating digital channels – suggesting organisations should employ multiple channels to drive awareness, particularly for older and regional audiences. One said,

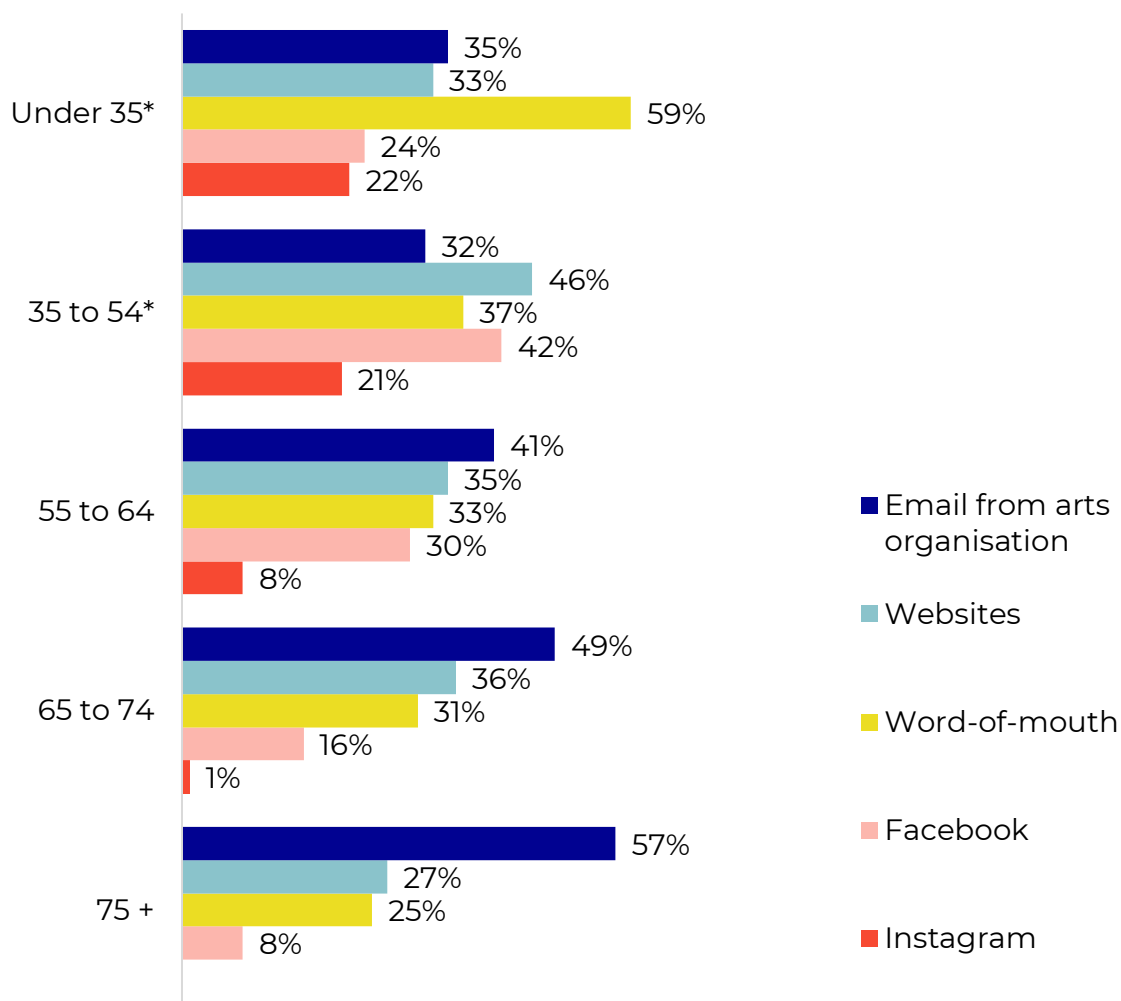
'I think that audiences in country towns like to see programmes advertised in the local paper, with articles in the paper, where possible.' (75+, SA)

Meanwhile, 6 in 10 (59%) of **under 35s** say they heard about a recent arts or cultural activity via word-of-mouth. However, with a small proportion of SA under 35s represented in the survey (n=46), these results should be interpreted with caution.

With this segment disproportionately facing financial barriers to attending cultural activities and events right now, word-of-mouth from family, friends and colleagues enables possible future attendees to hear reviews around the value and quality of cultural offerings.

Under 35s are also utilising social media channels, like Facebook and Instagram, more frequently compared to older age groups.

Figure 14: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By age group, August 2023 (SA audiences, n=632)



A third of SA audiences continue to engage in online arts and culture, and half say digital cultural activities still play a role in their lives

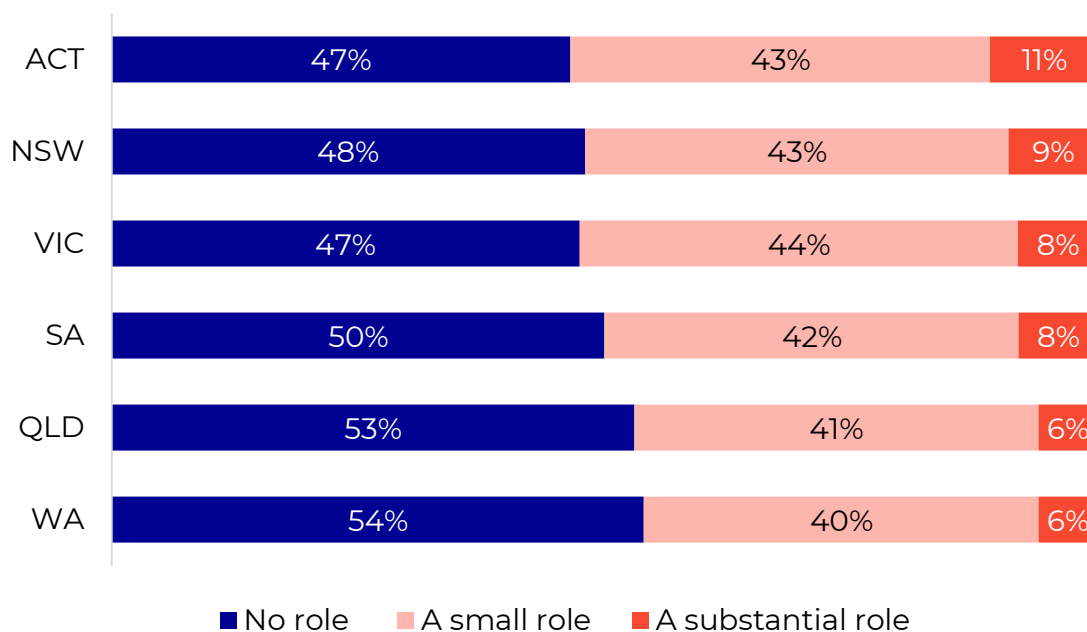
One third of SA audiences (35%) are currently participating in online or digital arts and culture experiences, slightly below the national rate (39%).

Participation in online arts and culture is relatively consistent across the states and territories. At 35%, SA audiences were the least likely to say they had engaged in arts and cultural activities online in the fortnight prior to data collection, below VIC and NSW audiences (41%), who were most likely to have engaged in online activities.

Respondents were asked what role online arts events/experiences play in their life now that venues are open for in-person attendance. Among SA audiences, 8% say they play a substantial role (down from 17% in October 2022), and 42% say they play a small role (down from 47% in October 2022) (Figure 15).

SA audiences are consistent with the national average (51%) when it comes to online arts and culture playing a small or substantial role in their lives (50%), just behind NSW and VIC (52%) and ACT (54%).

Figure 15: As venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? By state or territory of respondent. August 2023 (SA audiences, n=832)



Online spending amongst SA audiences has decreased since November 2021, with 1 in 4 digital audiences paying for arts experiences

The proportion of online audiences paying for digital arts experiences, which had remained relatively consistent throughout the pandemic, has declined since October last year.

One quarter (24%) said they paid for an experience in the past fortnight, down from 31% in October 2022, and November 2021.

SA audiences who were paying for digital arts and cultural experiences in the fortnight prior to data collection were purchasing single experiences (9%), subscribing to on-demand platforms (8%) and making donations (7%). Even fewer subscribed to programs or seasons that included the experience (2%).

Common barriers for SA audiences include technical challenges and a preference to attend in person

In August 2023, audiences were asked to describe the extent to which they have experienced barriers to participating in online arts and cultural experiences.

Some audiences mentioned facing technical challenges or set-up limitations as key barriers to engaging in digital arts and culture. These difficulties can inhibit their experiences and deter them from wanting to continue engaging online. One said,

‘Many are older, and not technically up to speed with either online booking or online events. Advertise in our local papers, or on our local TV channels please!!!!.’ (75+, SA)

Another said they experience...


‘Difficulty in obtaining tickets, lot of people my age struggle with the internet. You can no longer speak with an operator about tickets.’ (75+, SA)

Other respondents mentioned that having a desire to participate in person deters them from pursuing attendance of online events. One said,

‘Despite the push for more digital/streaming alternatives, the thrill of being part of a live performance with real people is the main draw for which I am prepared to pay a premium, despite current difficult economic conditions. YouTube provides plenty of opportunities to view outstanding performances, but nothing is as good as being there [in-person].’ (65-74, SA)

Audiences also acknowledged the importance of digital platforms for specific purposes such as international ‘big name’ artists, but still highlighted their preference to attend in person events post-pandemic. One said,

‘I think audiences are looking to support local artists post-COVID - given access to the big names digitally - the live event is most interesting when it connects to living artists.’ (Under 35, SA)



"Despite the push for more digital/streaming alternatives the thrill of being part of a live performance with real people is the main draw for which I am prepared to pay a premium despite current difficult economic conditions.

YouTube provides plenty of opportunity to view outstanding performances, but nothing is as good as being there."

Audience member
65-74, SA



Things to think about when connecting with audiences online

The online space is key when engaging audiences – though the lines get blurry where different types of content and different platforms connect with audiences.

Here are some things to consider for SA organisations:

- ❑ Compare these insights with your own analytics to reflect on what is right for your audience – and where there could be gaps or opportunities to improve
- ❑ Look at what is not working and what resources could be freed up to focus on priority opportunities
- ❑ SA audiences are currently looking for fun, energising, social experiences. Ensuring that realistic targets are set for digital experiences and that digital distribution strategies have a long-term horizon will be key
- ❑ Promoting online experiences which are low-cost could help to build audiences in the current financial climate.
- ❑ SA audiences are particularly reliant on word-of-mouth (especially under 35s, who are also using social media at high rates). Leverage this prominence as an awareness channel online, employing strategies that promote the social aspects of events, or encourage sharing
- ❑ Look at your ability to create segmented email campaigns with targeted offers and messaging for different groups (e.g., use email strategically and sparingly with under 35s and instead focus email campaigns on audiences aged 55+).

6.

Late decision-making



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

6. Late decision-making

Last-minute decision-making persists in SA, with audiences, taking longer to decide given their financial circumstances and prioritising other things. Organisations need to prepare for new phases in campaigns to reach people at the right time with the right messages.

Key points:

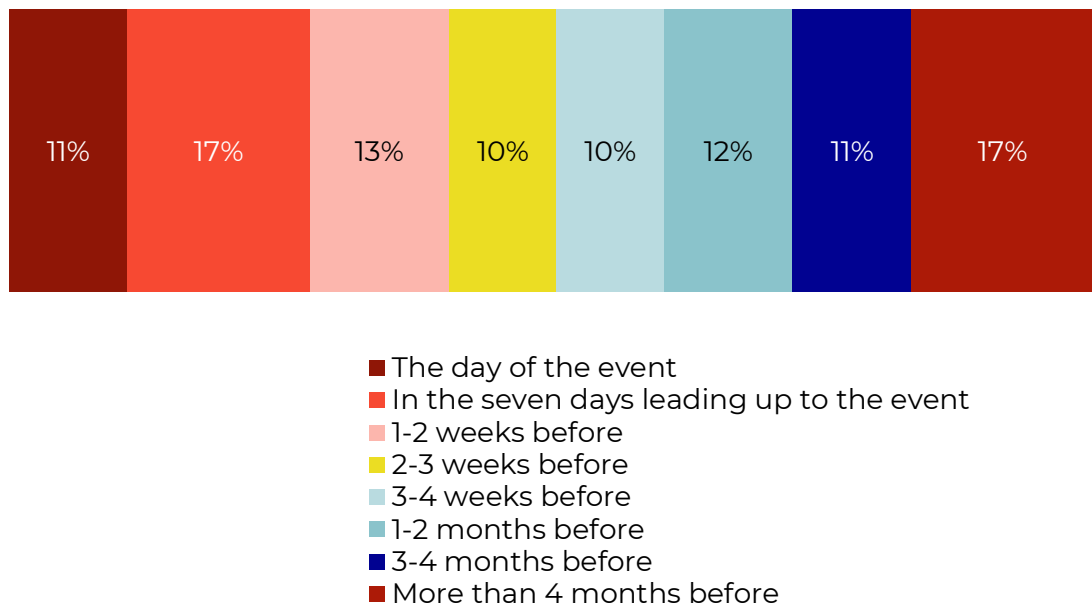
- 4 in 10 SA audiences are booking less than two weeks out, with 11% on the day of the event.
- Analysis of 'early bookers', 'mid-term bookers' and 'last-minute bookers' nationally shows that last-minute ticket buying is most common among under 35s and lower spenders. Those booking later are also more likely to rely on word-of-mouth.
- Ticketing initiatives to support more price sensitive audiences are important, but last-minute discounting may not be the answer.

Arts audiences were asked about how far in advance they booked or committed to the most recent event they attended

For the purposes of this report, we have summarised early bookers as those that lock in their tickets more than a month in advance, mid-term bookers as those who commit 1 – 4 weeks in advance, and last-minute bookers as those who book either the week of the event or on the day.

Overall, the last-minute ticket buying trend prevails among SA audiences, with 11% reporting they booked the last event they attended on the day of the event, and 17% in the week leading up to it.

Figure 16: Can you tell us how far in advance you booked or committed to go...? August 2023 (SA audiences, n=630)



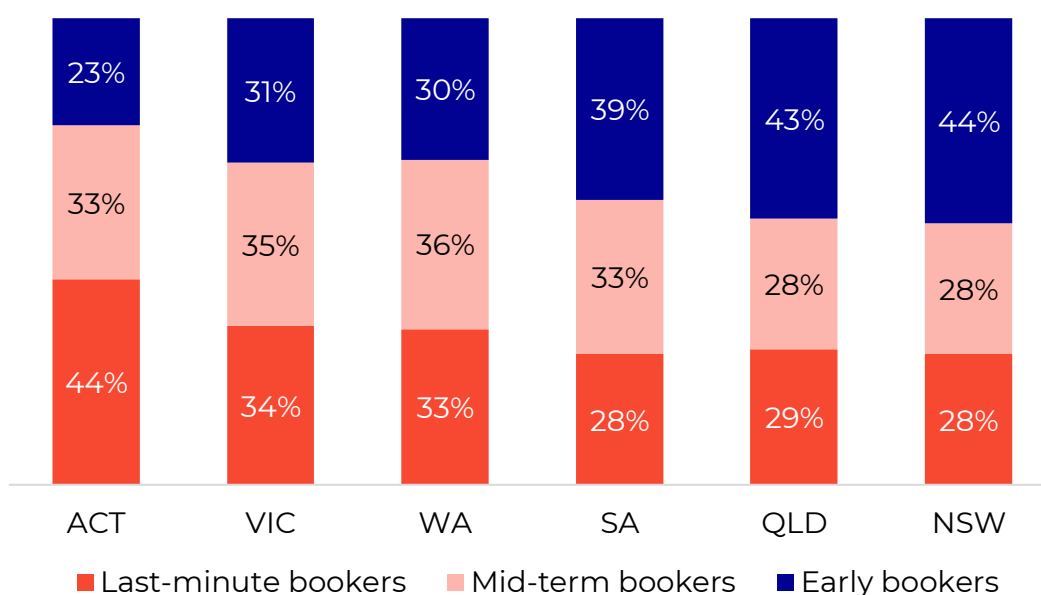
In SA, qualitative data indicates that key motivations for booking tickets early included wanting to secure particular seats, not wanting to miss out, and the need to plan ahead to coordinate travel timings and accommodation.

'Big name' artists/performers were also strong motivations for securing tickets early. Two-thirds (65%) of early bookers agreed that they were attracted to events with 'big name' artists/performers, as opposed to 54% of last-minute bookers.

Compared to other states, SA audiences are least likely to book last-minute, along with NSW (both 28%) and have a high proportion of early bookers (39%), after NSW (44%) and QLD (43%).

Meanwhile, audiences from the ACT are most likely of any state/territory to be last-minute bookers (44%), possibly linked to a higher frequency of gallery attendance in the ACT overall.

Figure 17: Can you tell us how far in advance you booked or committed to go...? By state or territory, August 2023 (SA audiences, n=630)



Late bookers described a range of reasons for purchasing last-minute tickets

Four in ten (41%) of SA audience members are committing or booking less than two weeks out, with 11% on the day of the event.

Many last-minute and early bookers reported feeling 'better off' or the 'same' financially as they were a year ago (62% amongst last-minute bookers; 60% amongst early bookers), whereas mid-term bookers were slightly less likely to do so (56%).

Around 6 in 10 (57%) of early bookers reported spending more than \$100 in the past fortnight on in-person live events and cultural activities, compared to 36% of mid-term bookers, and 13% of those booking last-minute.

Qualitative data indicates that several SA audiences are hesitant to book in advance because they are unsure if they will be able to make it due to illness, work, study commitments, finances, weather and other things that may arise. One said that they:

'Just go one week at a time. Family activities, winter coughs and colds and budget constraints make it hard to plan too far ahead.'
(35-54, SA)

Another commented,

'It was dependent upon the weather (being an outdoor event) and my availability on the day.' (55-64, SA)

With financial pressures continue to impact many across SA, one respondent said they book last minute because,

'I don't know if [I] can spare the money until nearer the time' (35-54, SA)'

Others mentioned that their attendance was a spur of the moment decision, based around various factors like the availability of their friends/family, not knowing what was on and wanting the flexibility to be spontaneous. Some shared,

'I travel a lot for work, so needed to make sure I'd be home. I also was organising a group of friends to go, so it was easier for us all to commit closer to the date.' (35-54, SA)

'I was considering it for some time and usually book well in advance (tonight going to a show booked months ago). Considered cost and then decided to "go for it" and enjoy life.'
(35-54, SA)

Other audience members simply did not feel the need to book early, sharing:

'No need to – Adelaide is notorious for not selling out.' (55-64, SA)

'Didn't think there would be an issue finding a session on the day.' (65-74, SA)

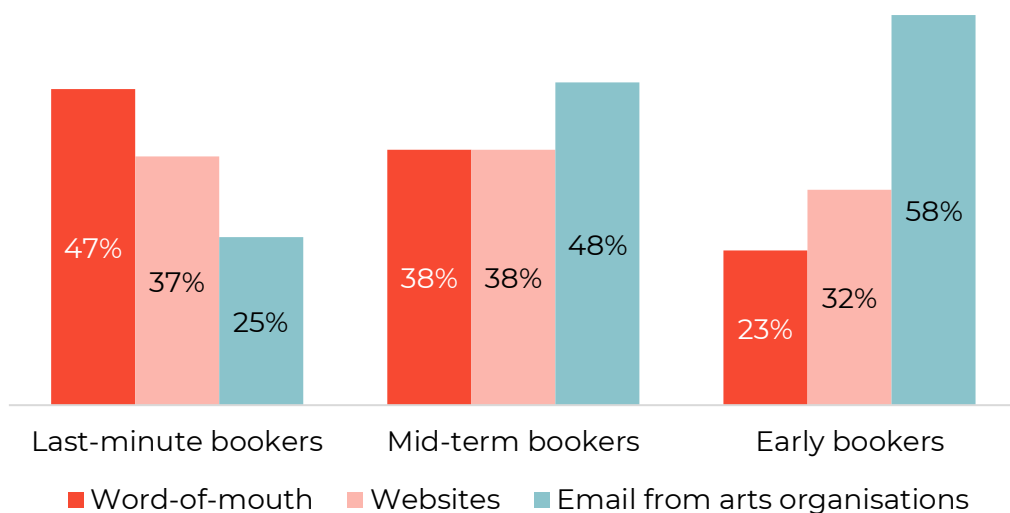
Last-minute bookers typically hear about events via word-of-mouth (47%), while early bookers rely on emails (58%)

Around 6 in 10 (58%) of early bookers in SA and half (48%) of mid-term bookers reported email as a means of hearing about the event they attended recently. Meanwhile, for late bookers in SA, email is less important, with 25% noting this as their awareness channel for their latest event.

Last-minute ticket buyers weren't necessarily committing based on things they saw online, but due to word-of-mouth recommendations (47%), social media like Facebook (22%) and Instagram (12%), and traditional media channels like radio and TV (21%), or outdoor poster/signage (16%).

Finding out about what's on via websites is important for all ticket buyers and is relatively consistent in terms of proportions (Figure 18).

Figure 18: How did you hear about the most recent event or cultural activity you attended? (Select all that apply). By booking purchase timeframe, August 2023 (SA audiences, n=630)



Things to think about when catering to different types of ticket-buyers

SA audiences have different motivations for the timing of their ticket purchases. A significant proportion of last-minute bookers suggests the trend is here to stay, so planning ahead can help to avoid last minute 'panic' discounting.

Here are some key considerations:

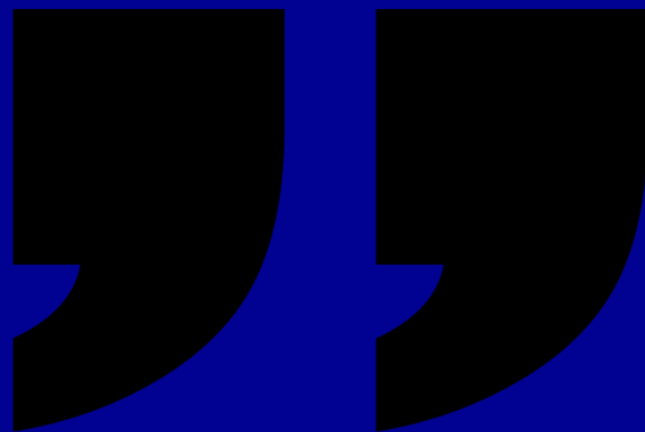
- ❑ Define the different phases of a campaign and review how tactics can change to suit different phases. For instance, what motivates early bookers is unlikely to work for mid-term and late bookers
- ❑ Consider methods of tracking intended attendance, beyond simply tracking ticket purchases e.g., providing opportunities to register interest.
- ❑ Review ticket prices for young audiences and if youth discounts are already in place, review age limits i.e., under 35 may be more appropriate than under 30 or under 25 given current conditions, and some artforms may have a case to extend this to under 40
- ❑ With some audiences feeling the need for flexibility in case of reason for a cancellation, clearly communicating any flexible exchange policies at point of purchase may help alleviate fears and encourage early booking
- ❑ Consider offering group discounts or family tickets (e.g., 2 adults, 2 kids or 1 adult, 3 kids) to relieve cost pressures on 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. Consider investigating a payments solution like ArtsPay, as some audiences are put off by high booking fees but are keen to support the arts and artists.



"Just go one week at a time.

**Family activities, winter coughs
and colds and budget constraints
make it hard to plan too far
ahead."**

Audience member
35-54, SA



7.

Subscriptions and memberships



Subscriptions and memberships

Subscribers and members are vital for many arts organisations, but their needs vary dramatically across audience segments in SA, presenting opportunities for SA organisations to adjust their packages to enhance the appeal for audiences.

Key points:

- One third (34%) of SA audiences are members or subscribers – lower than the national average.
- Subscriptions uptake and motivations amongst key segments in SA differ significantly.
- Older SA audiences want to show financial support and lock plans in early, while younger audiences are more likely to want access to discounted tickets.
- Opportunities exist for SA organisations to trial different offers and models, and test different messaging to target the unique needs and interests of different audience segments.

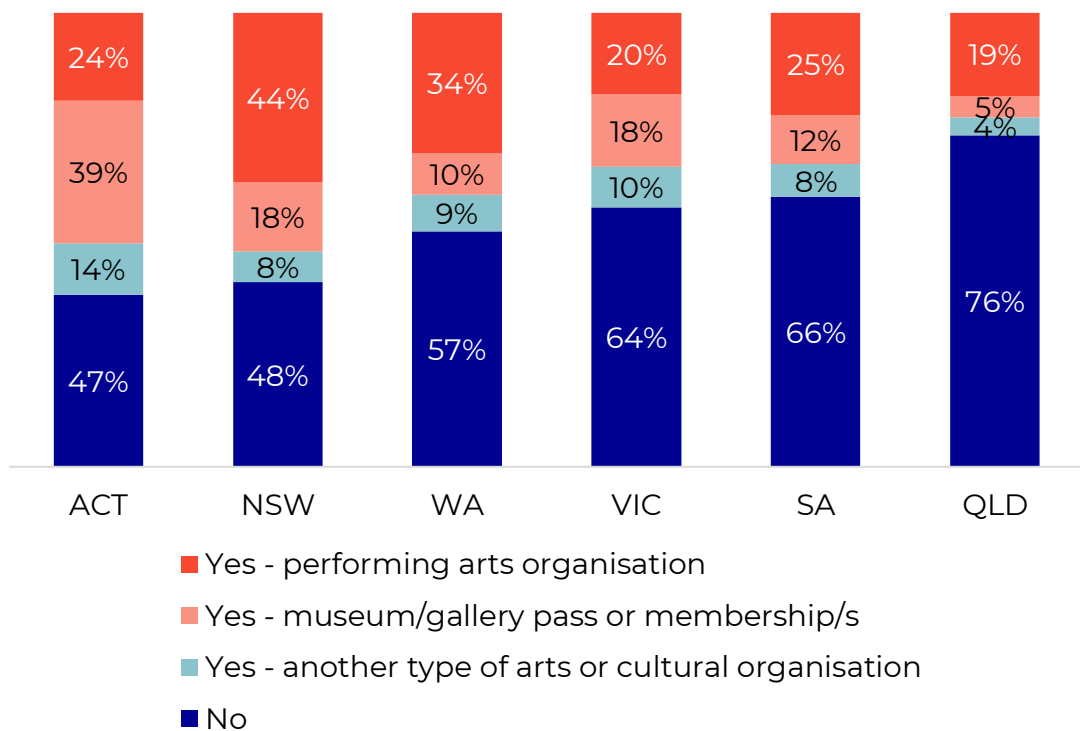
Around 1 in 3 SA audiences are members or subscribers in 2023 – lower than the national average

Around a third (34%) of SA respondents reported having purchased season tickets or a membership to an organisation this year – lower than the national average of 41%.

Compared to some states, season subscribers and membership rates are lower in SA (Figure 19). The proportion who are season ticket holders or members is highest in the ACT (53%) and NSW (52%), and lowest in QLD (24%).

In SA, performing arts subscriptions were more common in this sample, held by 25% of respondents, followed by museum/gallery memberships (12%). A small number (8%) held another kind of membership, for example, to literary festivals.

Figure 19: Did you purchase a season ticket, subscription or membership? By state or territory of respondent, August 2023 (SA audiences, n=831)



Qualitative data highlights that motivations for subscribing vary by age in SA

Qualitative data from older SA audiences suggests that many value that purchasing a subscription or membership helps them plan ahead – and secure their preferred seats. Some subscribers shared,

‘I think it gives certainty to arts organisations and it allows me to do long term planning in a busy life’ (65-74, SA)

‘I like to secure my seats and to plan my year.’ (65-74, SA)

Many also noted the convenience aspect, as one said:

‘It is the most efficient way to see the performances I most want to see.’ (75+, SA)

Older SA audiences are also motivated to show their support for the artists and organisations they love – with several noting they’ve been loyal subscribers or members for years. Some shared,

‘I believe in supporting arts groups I enjoy so that they can survive. Benefits that include early access to the best seats and flexibility to exchange them for another date are also important.’ (65-74, SA)

‘We have been subscribers for many years and will continue in order to support the organisations which bring us to much pleasure.’ (75+, SA)

Qualitative data from under 35s suggests perks such as access to discounted tickets are also strong motivators for purchasing subscriptions and memberships. One said,

‘Because as a student I attend (classical and contemporary) music concerts regularly, and a season pass is a lot cheaper than buying individual tickets’ (Under 35, SA)

Looking ahead, 1 in 3 SA audiences say they are likely to purchase a subscription or membership next year

Audiences were asked about the likelihood of them purchasing a subscription or membership next year.

1 in 3 SA audiences (32%) said they would be 'very likely' (17%) or 'likely' (15%) to purchase a subscription or membership for next year (Figure 20).

Compared to other states, this rate is slightly lower. Audiences in ACT (49%) and NSW (47%) are most likely to say 'very likely' or 'likely' – while QLD (24%) is the least likely.

Audiences were asked: 'Do you have any suggestions about how arts and cultural organisations can improve their subscription and membership programs to suit you better?'

Some SA audiences suggest that more flexibility and reviewing value for money would help, especially given the current cost-of-living climate. One said,

'Possibly more flexibility to attend over a longer period instead of only 12 months or have memberships that allow you access state-wide or nationally instead. Lower cost options – tiered pricing to allow for people who are financially struggling to still access the arts.' (35-54, SA)

Another said,

'Some subscriptions do not contain enough flexibility to create value for money, i.e., the value of the subscription is not returned through discounts on tickets, because I do not get to attend enough events; and there is no refund option.' (55-64, SA)

Some shared that they want variety in their arts attendance, and suggested a cross-organisational subscription model. They mentioned,

'I think the discount and special benefits works, as it encourages purchase of more concerts; for example, in the year after first few are attended. Perhaps getting discounts to similar organisations would be an advantage i.e., ASO and ACO.' (55-64, SA)

'I like to go to a variety of arts and cultural performances, shows etc. Therefore a subscription or membership program is not appealing. Having a pass that gave options to a few different organisations is something I would consider.' (Age unknown, SA)

Others mentioned that subscriptions that provide better options and value for money for families would be more appealing:

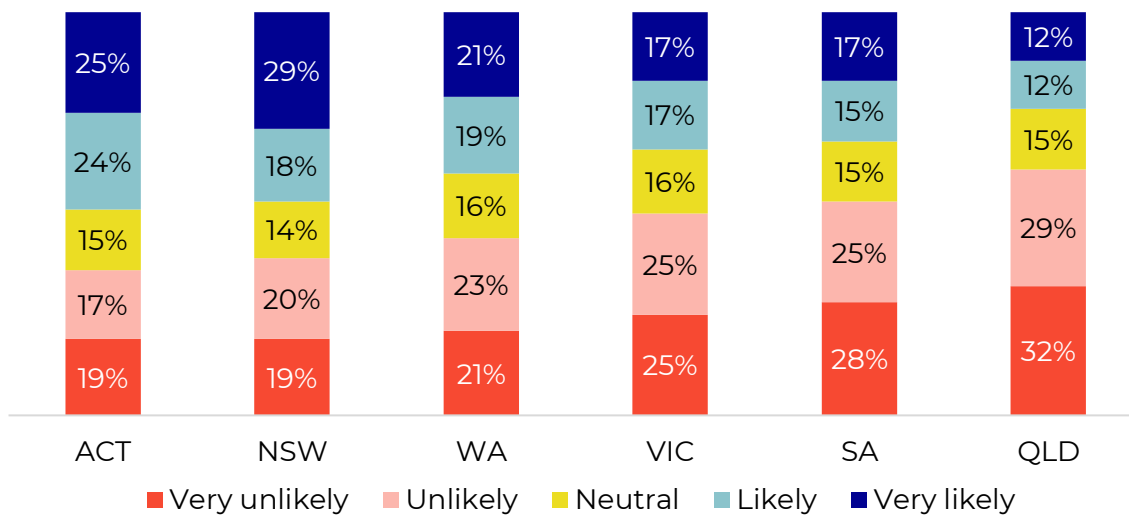
'It's hard – we have a young family, and we just don't get the value from membership, as there isn't enough on show where we can take the kids to make it worth our investment. We are financially better off just to buy the tickets to the shows we are interested in.' (35-54, SA)

'I'm not sure. I don't think I attend often enough to warrant a subscription. Maybe if there was a discounted family subscription, I'm not sure if there already is.' (35-54, SA)

Others think that more communication around the benefits of subscriptions and memberships could attract more audiences – with one suggesting a referral program:

'Let us know about them and how they work/benefits of having it etc. Make a referral program too so everyone feel that the more they use and spread the word, more discounts they get.' (35-54, SA)

Figure 20: How likely or unlikely are you to purchase a subscription or membership next year? By state or territory of respondent, August 2023 (SA audiences, n=830)





"I believe in supporting arts groups I enjoy so that they can survive.

Benefits that include early access to the best seats + flexibility to exchange them for another date are also important."

Audience member
65-74, SA



Things to think about when reviewing subscription and membership offers

Here are some things to consider for SA organisations:

- ❑ With subscription/membership behaviours and motivations differing across key audience segments in SA, it's important to consider whether a single subscription offering can appeal across age groups
- ❑ There may be a case to test new and different packages and target them at different age groups.
- ❑ Messaging of subscription campaigns will work best when tailored to a target age group. For instance, campaigns targeting young people could emphasise discounts and flexibility, whereas campaigns targeted at older audiences might emphasise the benefits of locking plans in early and showing their support
- ❑ Increase general awareness around the subscriptions and memberships your organisation offers, including the benefits, discounted offers, possible programming and how it provides value and support for artists and arts organisations
- ❑ Flexibility could be an untapped benefit of performing arts subscriptions in the current climate, whereby people can organise changes of dates with no extra charge
- ❑ Payment plans and/or monthly fees could have their place in memberships for younger people and other segments across SA – it's a space worth watching.

About the survey

On 2 August 2023, participating organisations simultaneously sent the Phase 9 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Over 8,800 audience members responded (8,816), from all over Australia: New South Wales (NSW; n=2,560), VIC (VIC; n= 3,046), Queensland (QLD; n= 1,005), South Australia (SA; n=833), Western Australia (WA; n=988), and the Australian Capital Territory (ACT; n=324). A small number of responses were collected from audiences in Tasmania (TAS; n=26) and the Northern Territory (NT; n=34). These are included in national averages but not reported separately.

What's next

To read about the story so far, visit the [study's Australian homepage](#).

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

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

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

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



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