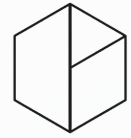


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PATTERNMAKERS



JULY 2021

South Australia Snapshot

Audience Outlook Monitor



Government of South Australia

Department of the Premier
and Cabinet

Summary

In early July, attendance rates in SA were the highest in the country - but outbreaks pose a risk to future attendance

In early July, three-quarters (74%) of South Australian (SA) audience members had attended an arts or cultural event in the two weeks prior to data collection, only slightly below March levels (79%) and the highest attendance rate in the country at the time.

SA audiences were among the least likely in the country to have had plans affected by lockdowns, though over half (55%) suggested that their plans to attend arts and cultural events had been affected, often due to restrictions on artists elsewhere.

At the time of data collection, 72% of SA audiences said they were willing to attend cultural events 'now or as soon as it is permitted' and a further 26% would attend when reasonably confident the risk of transmission is minimal.

However, the emergence of outbreaks is likely to have an impact and SA organisations may take note of the participation rates in other states such as WA and QLD to assist with contingency planning.

SA audiences are committed to the arts but COVID-safety will be important in the wait for vaccination

Like audiences in other states/territories, SA audiences are frustrated and disappointed by lockdown-related changes to events and some are adjusting their behaviour, making last-minute plans and opting for local events. Sizeable numbers also say that there are not as many options available (37%).

Despite these challenges many want to be optimistic and most SA audience members (78%) expect the amount they spend on arts and culture events to stay the same, or even increase, over the next 12 months, up from March 2021 (72%) – although the viability and availability of events is uncertain in the current climate.

Vaccination will play a key role in attendance decisions for many audience members, but COVID-safety measures like check-in procedures and improvements to ventilation systems can help build confidence in the interim.



Promisingly, SA audience members are being vaccinated at high rates, and the majority (87%) believe the vaccine rollout will be successful enough to allow normal activities to resume within 12 months.

Half of SA audiences expect to continue engaging digitally in future – and some are spending more to access quality content

Around a third (37%) of SA audiences participated in some form of online arts or cultural activity in early July, down from March 2021 (42%). This proportion has been on a downward trend since the digital participation boom of the early pandemic, when 74% of SA audiences were participating online.

However, when asked what role digital participation plays in their lives when in-person attendance is possible, 47% of SA audiences say that digital programming plays a small (40%) or substantial (7%) role – suggesting that digital participation continues to play an important role for a committed cohort of SA audience members.

1 in 4 SA audience members (27%) said they paid to access online content in the fortnight before data collection, down from March 2021 (35%). However, SA audiences may be increasingly likely to pay greater amounts for works of corresponding quality.

Introduction

This report summarises insights from almost 800 audience members in South Australia

This South Australia (SA) Snapshot Report outlines key findings from the July 2021 phase of the Audience Outlook Monitor in Australia (Phase 5), based on responses from 795 audience members connected with organisations in South Australia.

Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 7 July 2021, participating organisations simultaneously sent the Phase 5 survey to a random sample of their audience — defined as those who had attended an arts or cultural event in person since January 2018. Data collection concluded 4 days later, on 11 July. Around a week later (20–28 July), SA underwent a week-long lockdown in response to an outbreak of cases of the Delta variant. At the time of publication, some restrictions remained in place.

Almost 9,000 audience members across the country responded to the survey, allowing in-depth comparisons of trends in different jurisdictions (noting that results for the Tasmania should be interpreted with caution due to a small sample size in those jurisdictions). An asterisk is used to denote small sample size (*).

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

Read on for the key July 2021 findings in SA.

Current conditions

Despite disruptions around the country, comfort levels in SA remain strong for many public activities

Although recent outbreaks of the Delta variant have caused disruption around the country, comfort levels with public activities in SA in early July were generally consistent with March 2021.

Most audience members in SA were 'at least somewhat comfortable' participating in public activities. For example, most audience members feel somewhat or very comfortable eating at a local restaurant (98%, stable with 100% in March 2021), going to a local cinema (93%, stable with 95%), using public transport (83%, down from 86%), exercising at a gym (77%, stable with 79%) or flying domestically on a commercial airline (71%, stable with 72%).

Overall, comfort with public activities in SA audiences are the highest in the country – the proportion of audiences 'at least somewhat comfortable' is 5 to 10 points higher than the national average for all venue types.

However, the emergence of outbreaks, such as the 'Modbury Cluster' in late July (20–28 July) are likely to have an impact. For instance, among audiences in Western Australia (WA), where there was a snap lockdown shortly before the data collection period, comfort in public was down by up to 13 percentage points, depending on the activity.

Attending cultural events

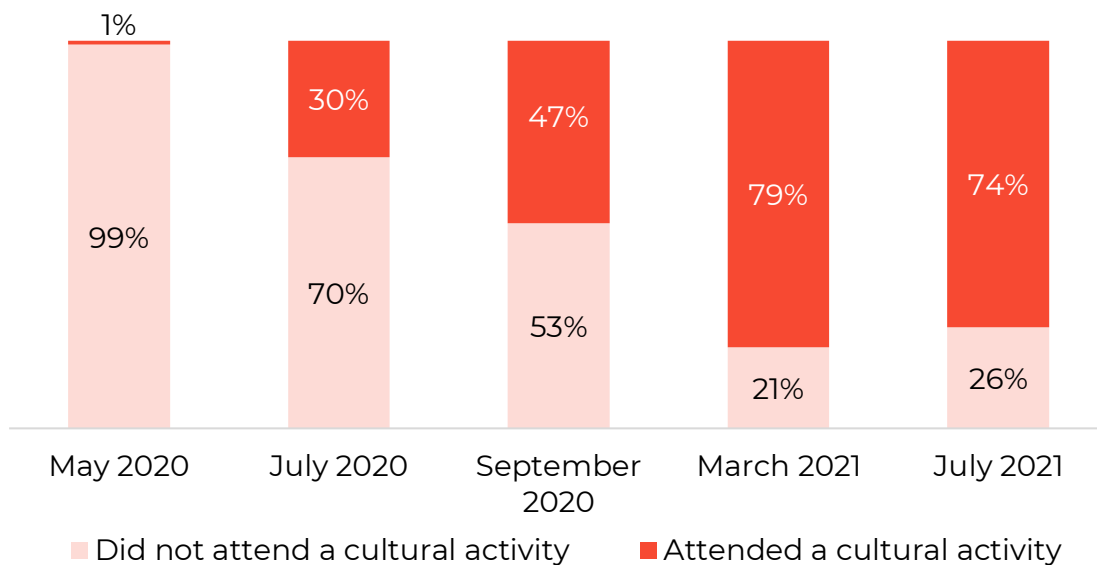
Three-quarters of SA audiences attended an event in early July – the highest rate in the country

In July 2021, three-quarters (74%) of SA audiences had attended an arts or cultural event in the two weeks prior to data collection (7–11 July 2021). Live attendance rates in SA have been on an upward trend, growing from 30% in July of last year to 79% in March 2021 as venues and facilities re-opened — but were set back slightly in the most recent results due to disruption from lockdowns elsewhere around the country. (Figure 1).



Despite this small setback, attendance rates in SA were the highest in the country – far above the national average of 54%. Again, however, the ‘Modbury Cluster’ outbreak in SA may mean that attendance has stalled since data collection – and rates might resemble lockdown-affected WA, where attendance had decreased to 53%.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (SA) July 2021 (n=795)



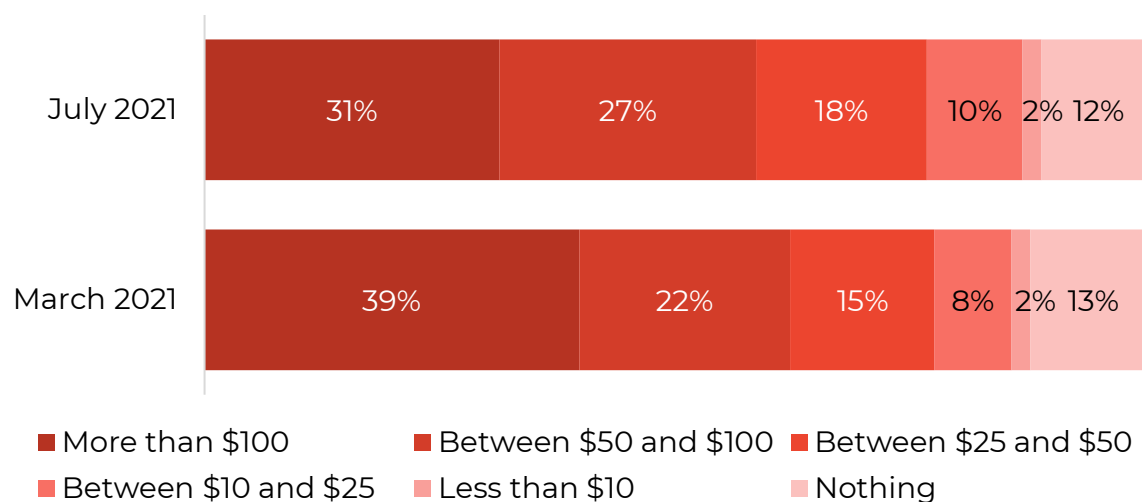
6 in 10 SA audience members spent over \$50 on tickets to cultural events in early July

Although live attendance had been set back slightly, 58% of SA audiences reported that they had spent more than \$50 on tickets to in-person cultural activities in the fortnight before data collection.

This proportion was down slightly from March 2021 (when 61% of audiences spent over \$50 on tickets). The proportion of audiences who did not spend any money on tickets to arts events was consistent with March 2021 (13%, stable with 12%). (Figure 2).

Data from July 2020 indicated that the proportion of SA audiences spending over \$50 in SA was among the highest in the country. In a positive sign for SA’s current outlook, spending remained high in states affected by short lockdowns, such as WA (52% spending over \$50) and QLD (60% spending over \$50).

Figure 2: In the past fortnight, how much did you spend on tickets to in-person live events and activities? (SA) July 2021 (n=531)



Comfort at arts venues was stable with March 2021 across the majority of venue types

Confidence at arts and cultural venues was high in SA, with the proportion 'at least somewhat comfortable' attending being stable with results in March 2021 for the majority of venue types.

Comfort levels are highest at museums or galleries (99% at least somewhat comfortable, stable with 99% in March 2021), community art spaces or studios (98%, stable with 98%), outdoor festivals or concerts (95%, stable with 96%) and concert halls and large theatres (92%, stable with 93%). Audiences are somewhat less comfortable at comedy clubs or live music venues (64%, stable with 62%), and hands-on exhibits at interactive museums (66%, up from 63%).

Across different venue types, audience comfort levels in SA were typically the highest in the country. Results were similar to WA for most venues, despite that state's recent lockdown, though SA audiences were slightly more comfortable at outdoor festivals and concerts (95%, compared to 92% in WA).

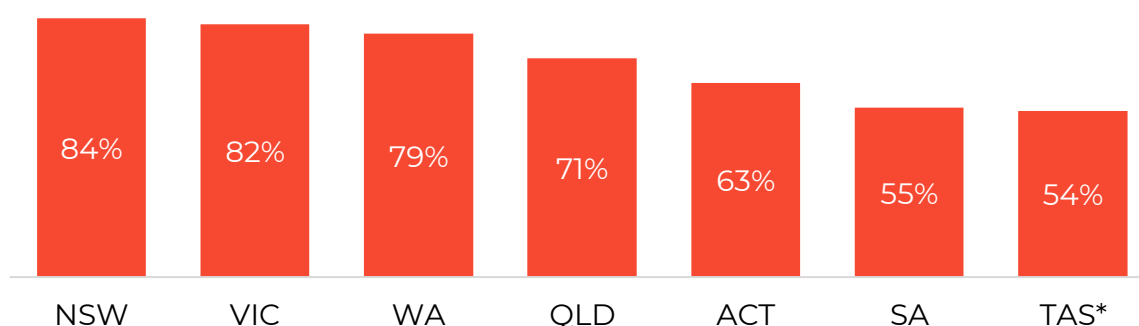
At the time of data collection, almost three-quarters of SA audience members were willing to attend cultural events 'now or as soon as it is permitted' (72%, stable with 73% in March 2021) and a further 26% were prepared to attend when reasonably confident the risk of transmission was minimal (stable with March). Only 2% cannot foresee going out until there is no risk (stable with 1% in March).

Impact of lockdowns and restrictions

Over half of SA audience members have had their plans affected by lockdowns and restrictions

Just over 5 in 10 SA audience members (55%) stated that their plans to attend arts and cultural events had been affected by lockdowns and restrictions in the four months leading up to data collection (7–11 July), compared to a national average of 76%. This proportion was one of the lowest in the country, along with audiences in Tasmania (TAS)* (54%) – significantly lower than WA (79%), NSW (84%) and VIC (82%), where recent lockdowns saw audiences impacted to the greatest extent. (Figure 3).

Figure 3: In the past four months, have your plans to attend in-person arts and cultural events been affected by lockdowns/restrictions? July 2021 (n=2,160)



When asked how they had been impacted by lockdowns, the majority of SA respondents said the artist they were planning to see was affected by lockdown/restrictions (65%) or the event/venue was in an affected area (38%). Compared to states like WA (67%), VIC (62%) and QLD (63%), SA audiences were much less likely to live in an area that was itself affected by lockdowns (15%). One audience member reported,

'We have been very lucky in SA and have not been in lockdown recently but have missed quite a lot of events anyway because of lockdown and quarantine in other states.'

A further 1 in 5 SA audiences (21%) chose not to attend events due to the risk of travel delays or quarantine. Some SA audience members highlighted the impacts of border closures and lockdowns in other states. One said,

'Plans made twelve months ago for an interstate two-week music event have had to be cancelled, affecting air travel, hire car, accommodation, pet boarding, catch up with friends, restaurant cancellations...'

Findings from SA audiences were similar to those in the ACT who had also not experienced major outbreaks at the time of data collection — and where attendance was more likely to be inhibited by the risks related to travel (25%) compared to being locked down oneself (17%).

By comparison, in states that had recently experienced cases of COVID-19 (such as VIC, NSW, and WA), audiences were equally likely to have been affected because the artist they were planning to see was affected by lockdowns, because venues were affected by lockdowns or because their own area was in locked down.

Risk of lockdowns and event availability are the primary barriers to attendance for SA audiences

In March 2021, audiences were asked 'Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?'

In July 2021, audiences were asked whether similar factors would affect their attendance over the next 12 months. In the coming year, SA audiences said they were more likely to be deterred from attending by the risk of future lockdowns and cancellations (46%, up from 33% in March 2021) and the fact that there are not as many options available (37%, up from 20% in March 2021).

Many audience members expressed concern that artists and events would be less likely to come to SA, impacting the availability of events. One audience member said,

'We would like to spend more however our concern is that most of our favourite artists may not travel to our region - South East of South Australia.'

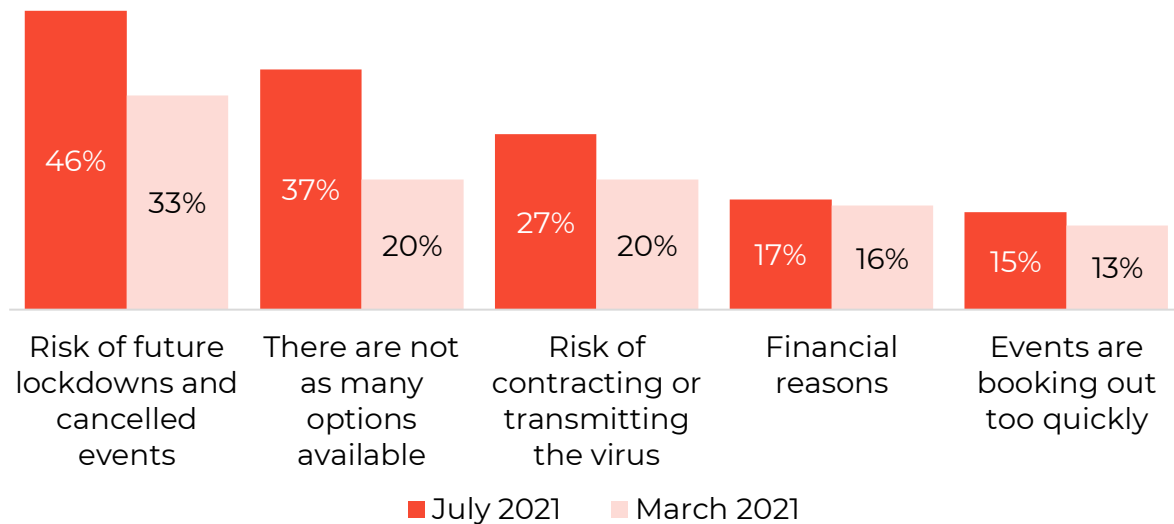
SA audiences were also increasingly likely to cite the risk of contracting or transmitting the virus as a barrier (27%, up from 20% in March 2021) — which may be influenced by the presence of the highly infectious Delta strain in the Australian community. However, across jurisdictions, SA audiences were the least concerned about the virus, along with those in WA (29%) — likely due to SA's successful suppression of major outbreaks so far.

Some less common barriers included the fact that events are booking out too quickly (15%, stable with 13% in March 2021) and financial reasons (17%, stable with 16%). (Figure 4).

Generally, SA audiences were most similar to WA audiences in regard to factors inhibiting attendance, with WA audiences also citing the risk of lockdowns (47%) and the availability of events (36%) as their primary barriers.



Figure 4: 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) July 2021 (n=791)



While lockdowns and cancellations are frustrating for SA audiences, they remain empathetic towards the artists affected

Reflections from SA audiences highlight that when events are cancelled due to lockdowns and restrictions, it can be frustrating and demoralising — and the inability to engage with arts and culture has taken a mental toll on some respondents. Others are anxious about the future of in-person attendance, as one audience member from SA shared,

‘The cancellation of shows has affected my mental well-being. I really miss live performance.’

Another person said,

‘[I felt] irritation, disappointment that plans had to change, and a little anxiety for future plans. However, I would prefer to be cautious than enter long lock down periods.’

Some SA audience members suggest that repeated lockdowns have made them more wary of booking events in the future – and it may take time to rebuild their confidence. One stated,

‘I am reluctant to put in place concrete plans for future events due to the uncertainty as to whether they will proceed, and then the inconvenience in seeking to recoup payment if they do not.’

SA audiences were also especially likely to suggest that lockdowns had made them less likely to book interstate events, with one respondent reporting,

'It was very uncertain until the last minute whether I would be able to go interstate for the event I wanted to attend, which was very stressful. Because of this I am very reluctant to try attending an interstate event again while lockdowns and interstate travel conditions are still a possibility.'

However, the majority of SA audience members were empathetic towards the artists and venues affected and accepting of necessary cancellations. They expressed an awareness of the mental and financial strain upon artists and venues and a desire to offer support where possible. One stated,

'My husband and I fully appreciate how difficult it is for the Arts and Cultural industry to constantly change restrictions and accommodate artists and audiences in a safe manner. We feel grateful for all you do.'

Another said,

'[I was] sad because we need something to lift our spirits but happy that most were rescheduled. I feel really bad for the artists and I'm okay with them holding onto my money.'

4 in 5 SA audience members made future plans to attend an event in the fortnight before data collection

Despite the uncertainty caused by recent lockdowns across the country, in July 2021 the majority (85%) of SA audiences reported they had made plans to attend arts and cultural events in the future (stable with 85% in March 2021).

Audiences in SA were the most likely in the country to make future plans in early July, followed by audiences in QLD (78%) and VIC (76%).

As data was collected in early July, this proportion may have since dropped back in light of SA's recent outbreak. Promisingly, however, planning for future attendance was also common in lockdown-affected states like WA (76%) – and may suggest that the majority of audiences are willing to engage in forward-planning even in the event of ongoing outbreaks.

The kinds of cultural events SA audiences planned to attend in July were consistent with March 2021, with the largest proportion of audiences planning to attend a live performance (60%), visit a museum or gallery (42%) or visit a cinema (36%).

SA audiences are increasingly looking into the near future to book events

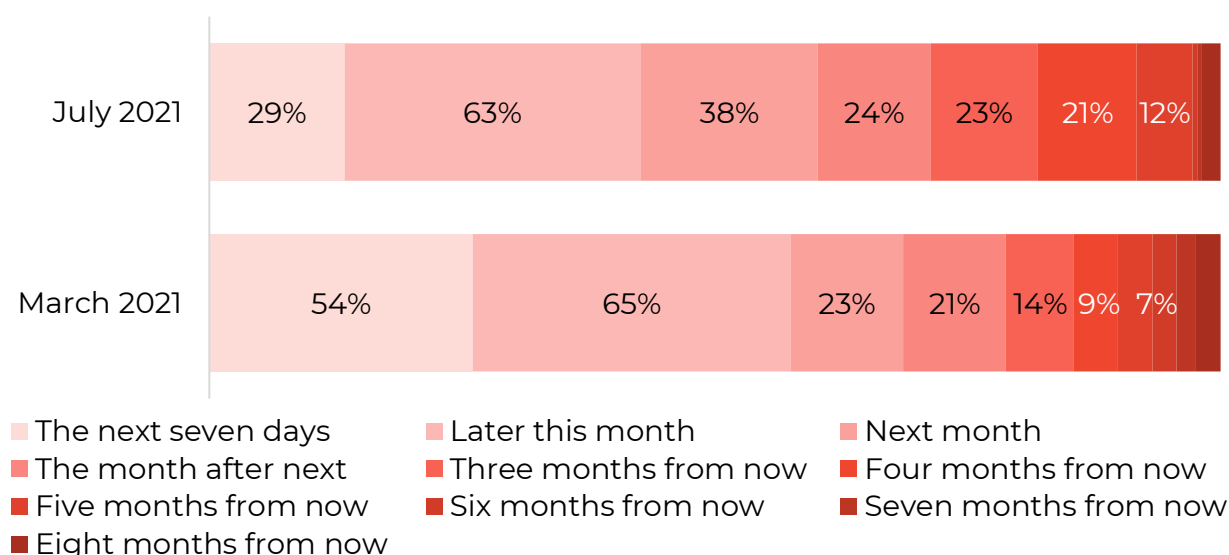
Although the proportion of audiences making future plans to attend cultural events is consistent with March 2021, the latest findings suggest that SA audiences have changed their approach to booking events in the future.

In March 2021, SA audiences were most commonly booking events for the next seven days or later that month. In July 2021, the proportion of SA audiences who booked events for the next seven days had decreased (29%, down from 54% in March 2021), likely due to the uncertainty around the country at the time of data collection.

The proportion booking later in the month was stable (63%, stable with 65% in March 2021) – but audiences were also increasingly likely to book events the next month (38%, up from 23% in March), two months from now (24%, up slightly from 21%), three months from now (23%, up from 14%), and four months from now (21%, up from 9%). (Figure 5).

Whilst likely reflecting the availability of events, this shift may also reflect greater confidence in booking events in the near future (1–4 months from now).

Figure 5: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (SA) July (n=364) and March 2021 (n=630)



Some audience members deal with uncertainty by making last-minute bookings and keeping it local

To avoid having events cancelled or plans changed, some SA audience members are electing to make last-minute bookings and prioritising events within their local area.

As one SA audience member shared,

‘Uncertainty is frustrating, but unavoidable. In one case a rescheduled event was moved to a date when we had another event scheduled so we requested a refund only to have the second event rescheduled. Discourages planning ahead, have started to book more things last minute.’

Other SA audience members have suggested that restrictions on interstate travel, and the possibility of future lockdowns or border closures, have led them to preference events in their local area. One stated,

‘[I’m] less likely to book interstate travel, and booking very late (i.e. just before the date) for any live performances, pending COVID cases in that area.’

Another said,

‘Less travel means more time to attend local events with friends and family. Also keen to support artists because they have struggled during the pandemic.’

Building confidence

The option to reschedule or refund tickets is giving SA audiences the confidence to make bookings

Among the SA audiences who experienced event cancellations in the four months prior to data collection (7–11 July 2021), a majority said that they rescheduled or rebooked the event (54%), while one-quarter (25%) requested a refund and 19% donated the value of the unused tickets.

Comments from SA audience members suggested that they were happy to continue booking events, as long as options for rebooking or refunding events are available. One said,

‘When making plans I build in the possibility that a cancellation may be necessary - therefore refund options are of prime consideration.’

Another said,

'They're very frustrating and disappointing, but these are just the times we live in for now. As long as we don't lose the money spent on tickets and we can re-book or refund easily, I don't mind.'

Audiences will be reassured by clear communication from venues around rebooking and refunds

Some audience members reported that in their experience, rescheduled events can be hard to manage or create flow-on expenses. One SA audience member shared,

'The change of date when the event was re-scheduled resulted in increased costs for overnight accommodation in Adelaide.'

Another said,

'A cancelled show impacts other bookings such as dinner, accommodation etc. It's time consuming to keep changing plans.'

Other audience members suggested that negative experiences surrounding requests for refunds have made them less likely to book events in the future. One person shared,

'One of the ticketing companies kept a lot of the ticket money. That was to be refunded. I will not buy tickets from them in the future unless its last minute to make sure [the] gig is going ahead.'

Another commented,

'I am much more cautious. It's one thing to say refunds will be honoured, it's another to experience quick and easy refunds.'

These responses suggest an opportunity for presenters to reassure and encourage audiences by clearly communicating refund or rebooking policies – and ensuring they are readily available to audiences during booking.

SA audiences will be most encouraged by the presence of check-ins and improved ventilation at arts venues

When asked to what extent a list of safety measures would encourage or discourage SA audiences to attend an event, the largest proportions said they would be encouraged by the presence of check-in procedures (86%) and improvements to ventilation systems (79%).

Almost half of SA audiences (52%, up from 49% in September 2020) also reported that they would be encouraged by requiring audiences to wear masks inside venues, though 21% (up from 16%) reported they would find this measure discouraging. One SA audience member reported,

'I won't attend an event that requires masks. It's very uncomfortable and not enjoyable at all.'

Across jurisdictions, SA audiences were among the most polarised in terms of their approach to mask-wearing, alongside WA (51% encouraged, 23% discouraged). States like NSW (77% encouraged, 9% discouraged) and the ACT (69% encouraged, 14% discouraged) tended to be more in favour of mandatory mask policies.

Over half (64%) of SA audience members said that they would be encouraged by limiting venue seating capacity to 75% and/or limiting capacity to allow 2 square metres per person (55%).

SA audiences were less in favour of taking temperatures at the entrance to venues - although 38% of audience members would be encouraged by the presence of this procedure, a further 63% felt neutral (41%) or negative (22%) about it.

SA audiences want to be informed in advance of COVID-safe policies – and want to see them in practice

In addition to the above measures, SA audiences stressed the importance of knowing the venue's COVID-safety protocols in advance so they can make informed decisions. One said,

'[I want to know] that they have a transparent COVID plan to keep all patrons safe.'

Another said,

'Lay out requirements clearly before attending, in case of live performance.'

Others emphasised that they wanted to see these protocols observed and consistently put into practice. One said:

'[Venues need to be] clear about what is expected in the space and seeing that staff are present and vigilant of enforcing those expectations.'

SA audiences prefer venues with fixed seating – whether they are indoor or outdoor

Looking ahead, SA audiences were asked to rank their preferences for attending events over summer, among a list of four different venue types. The largest proportion selected an indoor venue with fixed seating (43%) as their first preference, followed by an outdoor venue with fixed seating (38%) - while fewer (16%) preferred an outdoor venue where audiences were free to walk around.

One SA audience member stated,

'Sometimes people don't respect social distancing if it is self-regulated, so some formality is appreciated in this current climate.'

Some responses were motivated by factors other than virus transmission – such as weather, or the quality of the experience. One audience member stated,

'I love summer and being outdoor so would choose that first regardless of pandemic restrictions.'

Planning for future attendance

SA audiences want to see a continuation of pre-pandemic programming, though some are looking for light-hearted events

When asked about the types of arts and cultural content that they would be attracted to over the next year, the overwhelming majority reported that they wanted to see the same kinds of events they used to attend pre-pandemic (93% in July 2021, stable with 92% May 2020).



SA audiences were less likely than in May 2020 to agree that they wanted to see 'works that make sense of the pandemic' (9%, down from 23%), and more likely to be attracted to 'light-hearted programs' (36%, up from 19% in May 2020). One SA audience member said,

'I probably don't want to see anything really sad as the pandemic has made me aware of how fragile people and the economy are.'

8 in 10 of SA audiences expect to spend the same amount or more on cultural events, up slightly from March

When asked about their projected spending over the next 12 months, almost 8 in 10 (78%) of SA audiences said they would spend the same amount or more on arts and culture activities, compared to before the health crisis started. This proportion is up from March 2021 (72%), in a promising sign for the future – however, there remains uncertainty about the kinds of events that will be viable in the current climate.

The proportion of SA audiences who planned to spend more or the same was similar to QLD (78%) and WA (78%), and slightly higher than that of audiences in VIC (73%), the ACT (68%) and TAS* (64%).

Of the 11% of SA audiences who expected their spending to increase, some expressed a desire 'to make up for lost time' and a renewed appreciation for the role of the arts in their lives. One SA audience member was inspired to spend more by,

'A realisation that we have to be together and enjoy performance while we are able.'

Others were motivated by altruistic factors – such as the desire to help artists and venues thrive in the face of adversity. One SA audience member stated,

'Have found more options as a result of the state sponsorship of arts and culture through support for "experiences." Keen to demonstrate personal active and meaningful support for those negatively impacted by the coronavirus pandemic.'

Another stated,

'Because I want to make sure I support every cultural event I can - these artists are struggling. Build a new concert venue in Adelaide with state-of-the-art ventilation!'

1 in 5 SA audience members expect to spend less in the coming year, for both personal and pandemic-related reasons

However, 21% of SA audiences suggested that they expected their spending over the next 12 months to be less than before the pandemic began.

When asked why they expected to spend less, some SA audience members cited personal reasons – including changes to their mobility, financial circumstances, location or availability. Others gave pandemic-related explanations, citing the decreased availability of events, or the challenges posed by restrictions.

One stated,

‘Artists and shows aren't coming to South Australia. Also the no refund risk is getting greater and there are usually 3 elements (ticket, flights and accommodation) to what I go to see – i.e. Musical Theatre in Melbourne & Sydney. I can't afford to lose money when I can't get refunds.’

Another said,

‘I feel a bit pickier after the pandemic about what I spend my money on and what is important, doing more things at home with friends etc.’

Vaccination outlook

Vaccination is a key decision factor for many SA audience members

Many SA audience members see the vaccination rollout as a key factor in their decision-making to attend cultural events. When asked about the most essential information cultural organisations could provide, many SA respondents referred to vaccination in their responses. One stated,

‘Venues are already doing the best they can but it's the vaccination rate which is the most important factor.’

Some have suggested their attendance patterns won't return to normal until vaccination rates are higher, with one commenting,

‘To be honest, I have not been out and about as often over the past year and have felt slightly less comfortable with crowds. Until we reach a higher level of vaccination against COVID I suspect that hesitation will continue.’

Another said,

'I would like to have confidence in the vaccination percentages and continued suppression of COVID before being really happy that things are under control.'

SA arts audiences are more likely to be vaccinated against COVID-19 than the general population

SA arts audiences are more likely to have been vaccinated relative to the general population – which may help encourage those audience members who are looking for high vaccination rates before they return to regular attendance.

At the time of data collection in early July, almost all (92%) of SA respondents aged 75 and over had been at least partially vaccinated, compared to 73% of Australians over 70 in the general population, based on figures from the Australian Government Department of Health (<https://www.health.gov.au/initiatives-and-programs/covid-19-vaccines/australias-covid-19-vaccine-rollout>).

Three-quarters (73%) of SA respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population.

Almost one-quarter (22%) of SA respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the two-thirds of audiences under 35 who were not vaccinated, 86% stated that they would probably or definitely get vaccinated when it became available.

Most SA audiences are confident the vaccination effort will be successful in helping things return to normal

Promisingly, most SA audiences (87%) are at least somewhat confident that the vaccination effort will ultimately be successful in allowing normal activities to resume within a year (stable with 89% in March 2021).

SA audiences were the among the most confident around the country, alongside NSW (89%) and QLD (87%). Audiences in the ACT were the least confident, with four-fifths (81%) at least somewhat confident.

Online participation

Almost 4 in 10 of SA audiences participated in arts and culture online

Over a third (37%) of SA audiences were participating in digital arts and cultural experiences in early July, down from 42% in March 2021.

The participation rate in SA was similar to that of audiences in QLD (37%) and WA (40%), but lower than states such as NSW (50%) and VIC (47%), where digital participation rates have generally been higher throughout the pandemic.

In terms of the types of online experiences, SA audiences were most likely to have watched a pre-recorded video of a performance (22%, stable with 22% in March 2021), participated in an online class or tutorial (13%, stable with 15%) or watched a live streamed performance (14%, down from 22%) in the two weeks prior to data collection.

1 in 2 SA audiences state that their engagement with online arts and culture will continue beyond the pandemic

In July 2021, audiences were asked, 'When venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life?'

Around half (47%) of SA audiences say that digital programming plays a small (40%) or substantial (7%) role, confirming the ongoing importance of this area post-lockdown.

This proportion was similar to QLD (48%) and WA (48%) and lower than NSW (57%) and VIC (56%), which generally see higher proportions of audiences online outside of lockdown periods.

Of the SA audience members who expected to continue engaging with online arts and culture in the long-term, many suggested that they would be motivated by the convenience, comfort and accessibility of at-home viewing.

Others cited the diversity and creativity of works which come out of the digital format. One audience member stated,

'There are always going to be shows and events that take place far away and/or at inconvenient times for me to attend in person, I will most likely attend some digital workshops and watch recorded theatre.'

Another said,

'[I'll continue to participate online] when there are experimental plays like Redline Productions put on during the lockdown last year - actors, director, technical all in different countries. I love creativity and imagination and flexibility like this and support people who give something different a go.'

Digital programming can open up the range of events available to SA audience members

Many SA audience members commented on the accessibility and availability benefits of digital programming, suggesting that it allows them to attend events they couldn't otherwise.

Some pointed out that digital audiences are not constrained by physical distance – meaning that SA audiences are able to engage with interstate events or regional/remote audiences with intercity programming. One stated,

'Living in a small rural town it is often difficult to get to events, but if it was possible online rather than not at all, I would pay to watch on line. The pandemic has opened up other ideas.'

While another stated that online engagement provided a chance to see,

'Events that are not visiting Adelaide and happening in other cities I won't have a chance to visit, i.e. Hamilton, National Theatre live events.'

For SA audiences with disability, digital participation can provide an accessible alternative to in-person attendance. One audience member stated,

'I have arthritis so, if by chance I booked ahead to attend in person but on the day my disability means I can't leave the house easily, I'd be happy to watch online from home.'

Most SA audiences tuned in alone, but some use online events to connect with others

When asked how they participated in a digital event or experience, the majority of SA audiences suggested they tuned in alone (70%).

However, the SA results revealed that there are many ways digital participation can be enjoyed with other people – including watching with other members of one's household (28%), gathering in public to watch a live-streamed event with an audience (13%), tuning in as part of an in-person gathering of friends and family



(8%) and connecting online with friends and family who were tuning in elsewhere (9%).

1 in 4 SA audiences are paying to access online content - with the proportion spending over \$50 trending upwards

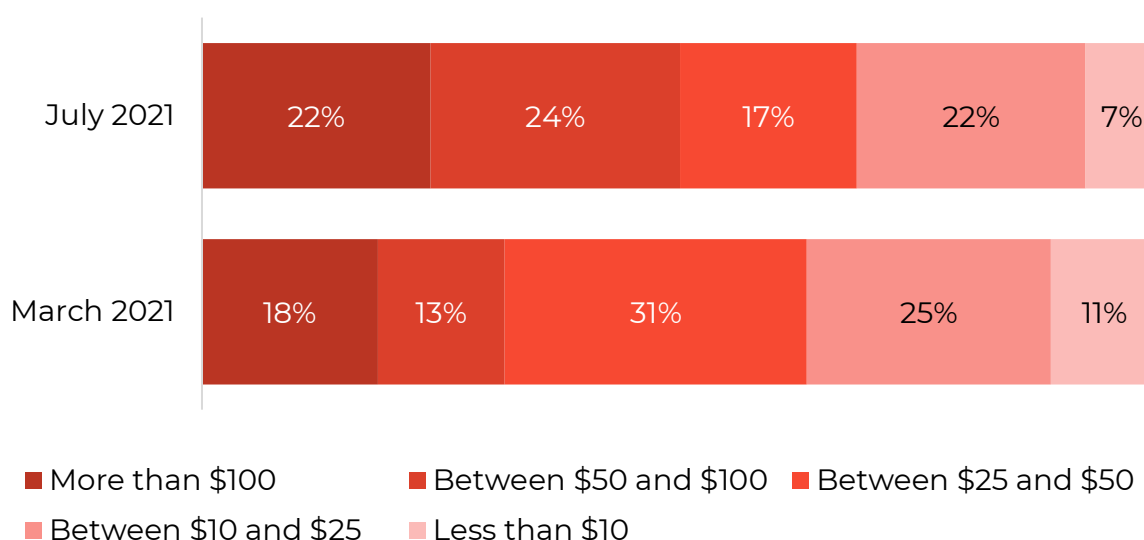
In the fortnight before data collection (7–11 July), 1 in 4 (27%) SA respondents had paid to access online content (down from 35% in March 2021).

SA audiences were slightly below the national average (33%) for spending on digital programming — though more likely to have paid for online content than audiences in WA (23%) and less likely than audiences in VIC (37%).

Participation in some forms of paid online experiences had decreased since March 2021, including one-off pay-per-view arrangements (12%, down from 20% in March) and making a donation as an expression of gratitude for an online experience (10%, down from 14%).

Of the audience members in SA who paid for digital content in the last fortnight, around half (46%) spent over \$50 (up from 31% in March). This finding should be interpreted with caution due to the small sample size of the cohort, but is in line with trends observed nationally — suggesting that ‘digital devotees’ are willing to spend on quality online content as the market matures. (Figure 6).

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (SA) July 2021 (n=58) and March 2021 (n=72)



What's next

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

www.thepatternmakers.com.au/covid19

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

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

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

Acknowledgment

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