



PATTERNMAKERS



Audience Outlook Monitor

South Australia Snapshot

November 2022



Government of South Australia

Department of the Premier
and Cabinet

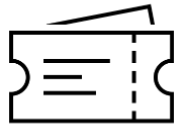
Live Attendance Outlook

Audience behaviour will continue to evolve as a range of new factors impact the path to recovery, according to data collected in October 2022 from 700 South Australian past attendees.



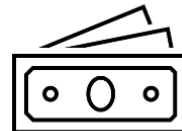
70%

are 'ready to attend now', up from 63% in August '22, the highest since the pandemic began



42%

are still attending performing arts events less than they used to, pre-pandemic, so full recovery remains a way off



60%

are spending \$50+ on cultural events, with spending slightly down from March '22 levels (64%)



#1

financial reasons are now the top barrier to attendance – surpassing the risk of transmission

Key trends



46%

expect their attendance will increase over the next year, 49% say it will stay the same



19%

say there has been a change in their preferred time, day or location of cultural events



71%

will be attracted to fun, uplifting content, while 42% are drawn to challenging things



52%

want to try things they haven't experienced before

Attendance in South Australia is steady as confidence rebuilds, but non-Covid factors are complicating the picture

- ▶ With regards to COVID-19, South Australian (SA) audiences are rebuilding their confidence, according to the October 2022 data from 700 SA past attendees. 70% say they are 'ready to attend now' – up from 63% in August and 59% in March 2022, when the state was approaching a second peak in cases.
- ▶ Many are feeling positive about attending events right now, and three quarters (75%) attended a cultural event in the fortnight before data collection, relatively stable since August (78%) and March 2022 (76%).
- ▶ Attendance frequency is slowly returning to pre-pandemic levels. Right now, 59% of SA performing arts attendees are attending as often as they used to (or more), compared to before the pandemic.
- ▶ Spending levels are increasing. The proportion spending over \$50 on arts and culture in the past fortnight (60%) is stable with August (60%) but down slightly from March (64%) – with rising costs of living likely playing a role.
- ▶ Full recovery will take time. While most SA audiences are feeling confident and optimistic, there's no doubt the picture has changed over the pandemic – and economic pressures, lifestyle changes, new priorities and the availability of events will continue to impact behaviour in the next year.

1 in 3 SA audience members say there may not be enough events on offer – and there's demand for new and uplifting content

- ▶ SA audiences are optimistic about future attendance, with 46% saying they expect to attend more often in the next year, and 49% saying their current attendance levels will stay the same.
- ▶ However, a range of supply and demand factors could limit their attendance. A third of SA audiences say there's a lack of events that appeal to them (34%), and they are also the most likely nationally to say they're prioritising other things at the moment (25%). Smaller proportions are also lacking energy to go out (21%) or facing challenges securing tickets (13%).
- ▶ Price sensitivity may increase, as financial reasons are now exceeding the risk of the virus as a barrier of attendance – affecting 43% of SA audiences (up from 25% in August 2022).
- ▶ Last-minute ticket buying is here to stay, with August 2022 data showing the majority of SA audience members book events within the next seven days (29%) and the next 2-3 weeks (42%).
- ▶ Across the country, cultural tourism will take time to recover with local attendance most common (60%). 1 in 10 (10%) SA audience members are attending events interstate, consistent with the national average (11%).
- ▶ Many SA audiences are seeking new (52%) and uplifting (71%) cultural experiences. There's interest in boosting morale and make up for lost time, following the challenges of the past few years and limited access to touring works during border closures.

4 in 10 SA audience are participating in the arts online – with virtual opportunities vital for accessibility

- ▶ Online channels continue to play an important role in connecting with SA audiences and improving accessibility.
- ▶ Digital marketing is paramount for live events and most SA audiences are using online channels, such as eNews (60%) and websites (49%) to find out what's on.
- ▶ Online participation in cultural activities is relatively stable. 4 in 10 SA audience members (38%) participated in some kind of online arts recently (stable with 38% in March and up slightly from 42% in November) – such as pre-recorded video (19%) and online classes/tutorials (14%). This is relatively consistent with national trends (41% participated online, stable with 42% in March).
- ▶ Spending on digital activities is also stable – and overall, digital consumption patterns appear to be reasonably fixed. One third of online audiences (32%) paid for a digital activity recently, stable with 32% in March. Among those paying, 33% spent over \$50.
- ▶ Two-thirds continue to see a role for digital, with 64% saying that these experiences continue to play a 'small' or 'significant' role in their life – slightly down from March (68%).
- ▶ Online cultural participation is higher among SA audiences with access needs including audiences with disability (55%), those aged 75+ (42%), or those with someone vulnerable to COVID-19 in their household (52%).
- ▶ SA audiences appreciate the value of digital programs in overcoming barriers to live attendance – a topic that will be explored in detail in an upcoming Fact Sheet and set of case studies.

Introduction

This report summarises insights from 700 audience members in South Australia

This South Australia (SA) Snapshot Report outlines key findings from the October 2022 phase of the Audience Outlook Monitor in Australia (Phase 8), based on data collected from 700 audience members living in SA.

On 12 October 2022, participating organisations simultaneously sent the Phase 8 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

This report compares the new results with data collected previously in July 2021 (Phase 5), November 2021 (Phase 6), March 2022 (Phase 7) and the August 2022 'Pulse Check' to examine how things are changing over time. Where relevant, the SA results are compared to those in other states/territories, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes in those areas.

In addition to this Snapshot Report, the October 2022 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19.

Read on for the key October 2022 findings for SA.

Image Credit: Xplorer Studio, Lucky Dumpling Market – OzAsia Festival 2021. Courtesy of Adelaide Festival Centre.

Attendance outlook

4 in 10 SA audiences are attending less than they did before COVID-19, as the impacts of the pandemic persist

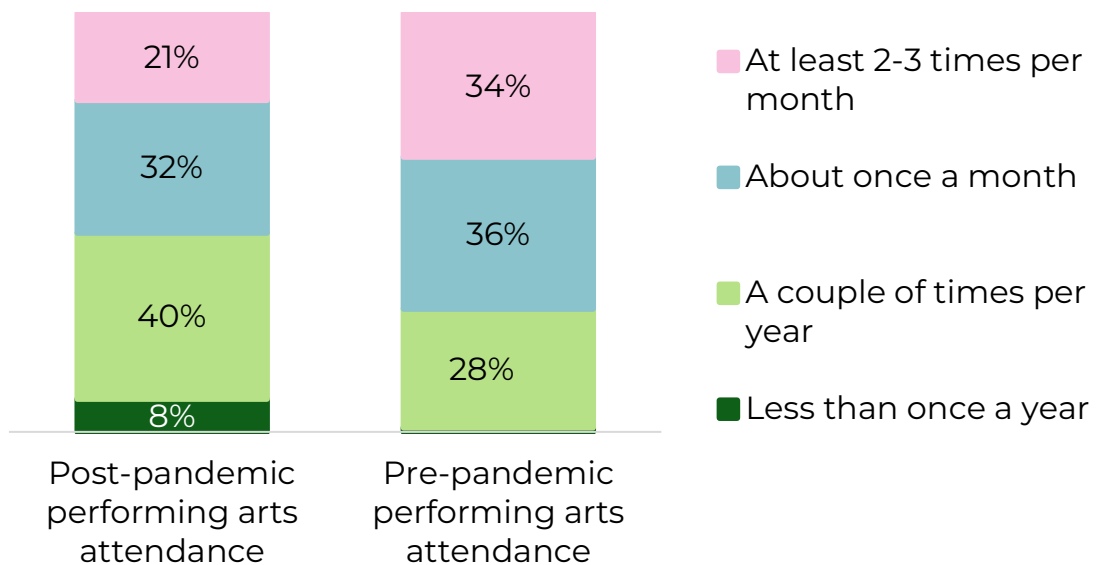
This phase of the Audience Outlook Monitor sought to compare attendance frequency in the 'new normal' to pre-COVID activity – and showed that the long tail of the pandemic continues to impact a significant proportion of SA audiences.

Overall, 4 in 10 SA audiences are attending performing arts events less than they did pre-pandemic (42%) – while 6 in 10 are attending the same amount (55%) or more (4%).

Looking at it in terms of attendance frequency, before the pandemic, 7 in 10 (70%) SA audiences said they attended regularly (once a month or more).

Now the proportion attending the performing arts regularly (once a month or more) has fallen to 53%. It's quite common that audiences are attending the performing arts only a couple of times a year or less (48%).

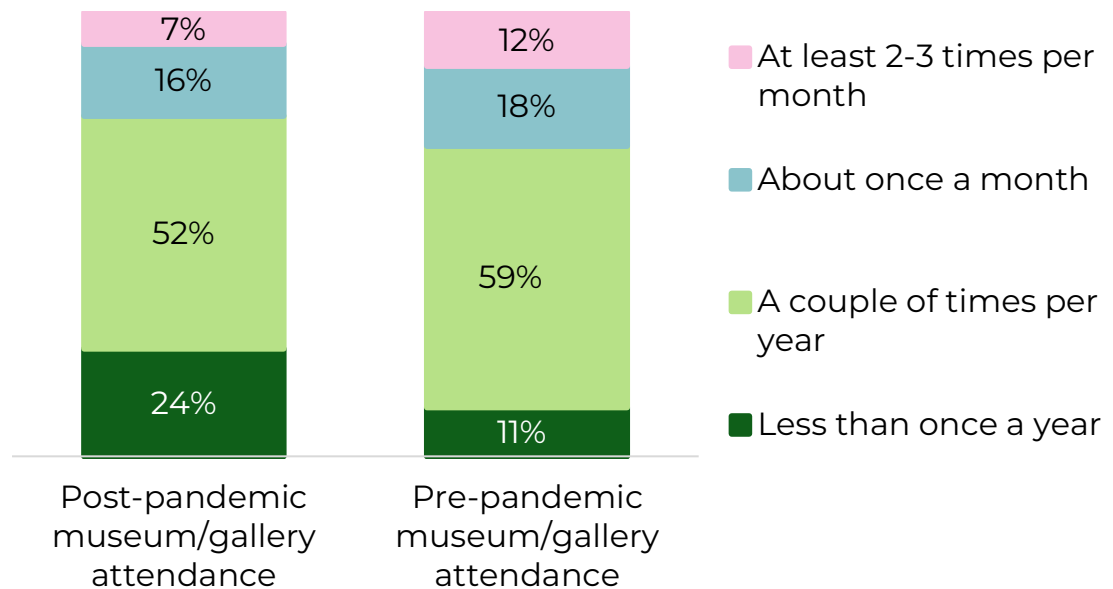
Figure 1: Pre-pandemic, roughly how often did you attend performing arts events? And now, roughly how often do you attend performing arts events? SA audiences (n=680)



Frequency has been impacted less dramatically for museums and galleries, but one quarter (27%) of SA audiences are attending less than they did pre-pandemic.

In terms of frequency levels, 30% of SA audiences were regular visitors pre-pandemic – attending at least once per month. Now, 23% of museum and gallery attendees are visiting this often. It’s become more common to attend less than once a year (24%, up from 11%).

Figure 2: Pre-pandemic, roughly how often did you attend museums and galleries? And now, roughly how often do you attend museums and galleries? SA audiences (n=601)



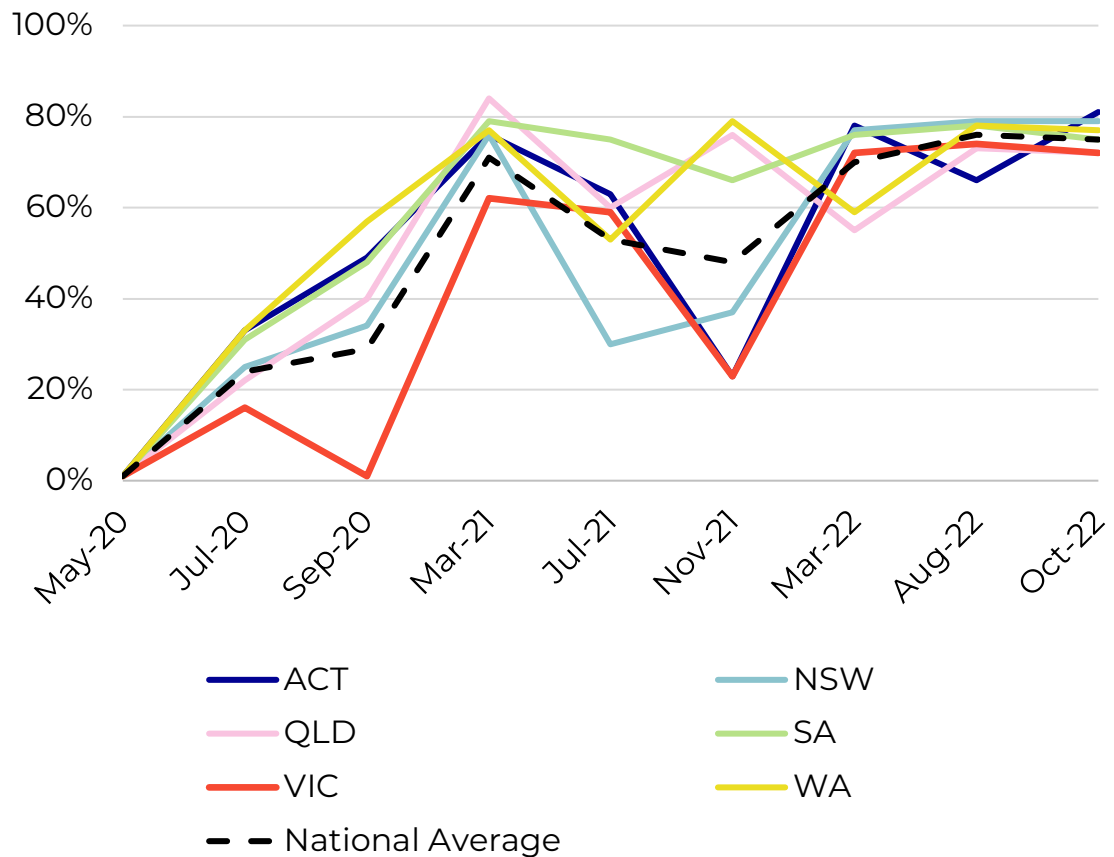
These trends were more pronounced for risk-averse SA audience members, who attended just as frequently as other audiences pre-pandemic but are now, on average, attending significantly less.

Attendance is stable, with three-quarters of SA audience members having attended cultural events recently

Three-quarters (75%) of SA audience members attended a cultural event in the fortnight before data collection (12-16 October 2022), consistent with August (78%) and March 2022 (76%) (Figure 3).

Attendance has rebuilt slowly from November 2021 (66%), when the reopening of the state’s borders preceded its first major outbreak. However, attendance in SA is yet to meet the rates of other states such as the ACT (81%) and NSW (79%).

Figure 3: Proportion of audiences who attended a cultural event in the fortnight before data collection, by state/territory, May 2020 to October 2022 (n=5,438)



Qualitative data suggests that most SA audience members feel newly positive in the current context. One said,

‘It is fantastic to be back. Life doesn't feel whole without the arts. I think there is also a new appreciation for the arts since lockdown.’

Another said,

‘I missed interaction, peoples’ reactions to the live arts, supporting performers, and engaging with them in live performance. Wonderful!’

Confidence levels are slowly improving for SA audiences – the main challenge being building frequency and spending

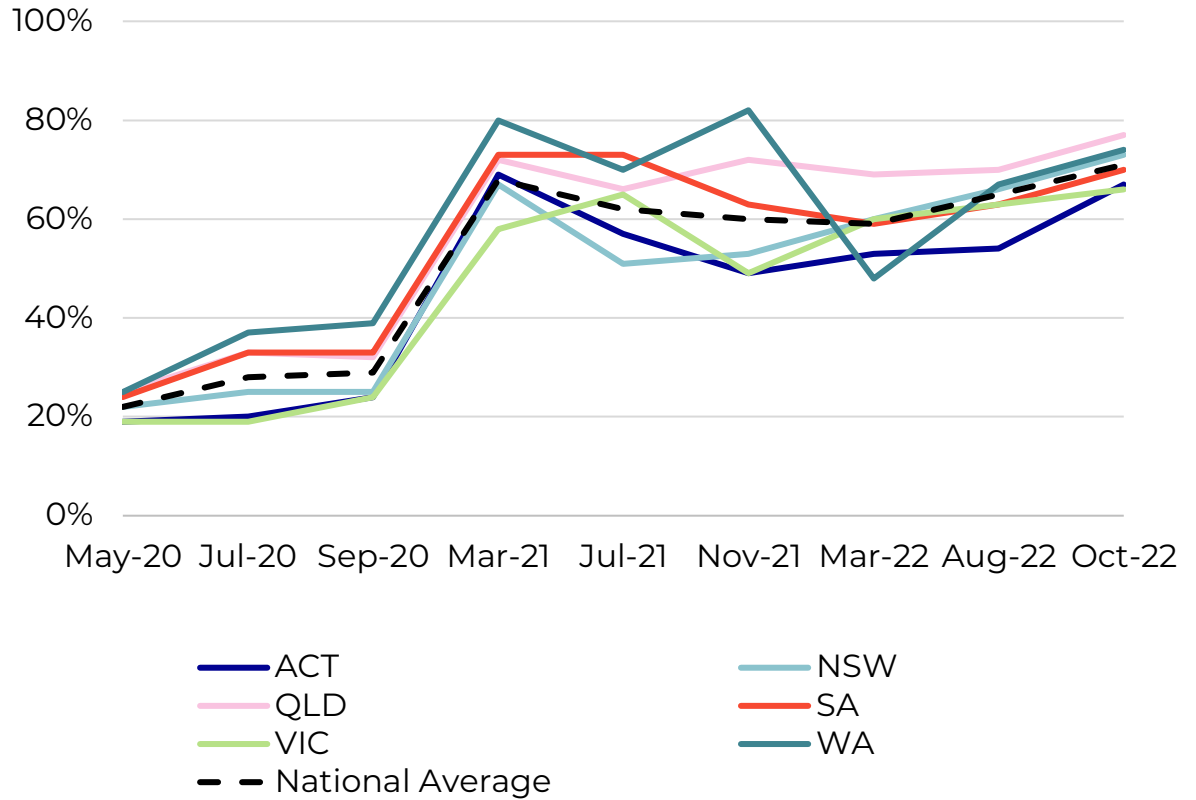
Only a small proportion of SA audience members aren't willing to go out right now (1%). Seven in ten (70%) are willing to attend 'now', rather than when 'reasonably confident the risk of transmission is minimal' (29% in October, compared to 33% in March).

This proportion is on par with NSW (73%) but is tracking behind QLD (77%), as shown in Figure 4. One SA respondent said,

'I'm going to see 9 to 5 next week, and it is fantastic to feel comfortable going for the first time in 2 years. The arts provide an escape from day-to-day troubles and joy. Life is much better when you get to see a range of arts.'

Meanwhile VIC (66%) and ACT (67%) audiences are currently the most risk averse – suggesting that full recovery may take time for states/territories affected by significant pandemic disruptions.

Figure 4: Proportion of audiences who are 'ready to attend now or as soon as permitted', by state/territory, May 2020 to October 2022. n=5,438



With risk tolerance increasing as the situation changes, the main challenge now is building frequency and spending.

In SA, cultural spending in October is down from March but stable with August – but time will tell if this trend holds amidst rising costs of living and economic pressures. Six in ten of SA audience members (60%) spent \$50 or more on arts and cultural events in the past fortnight — down slightly from March (64%) and stable with August (60%).

Compared to other parts of the country, SA audiences are tracking similar to WA audiences (61% spent \$50 or more) and VIC audiences (59% spent \$50 or more). However, SA audiences are spending slightly less than QLD audiences (65% spent \$50 or more) and NSW audiences (71% spent \$50 or more).

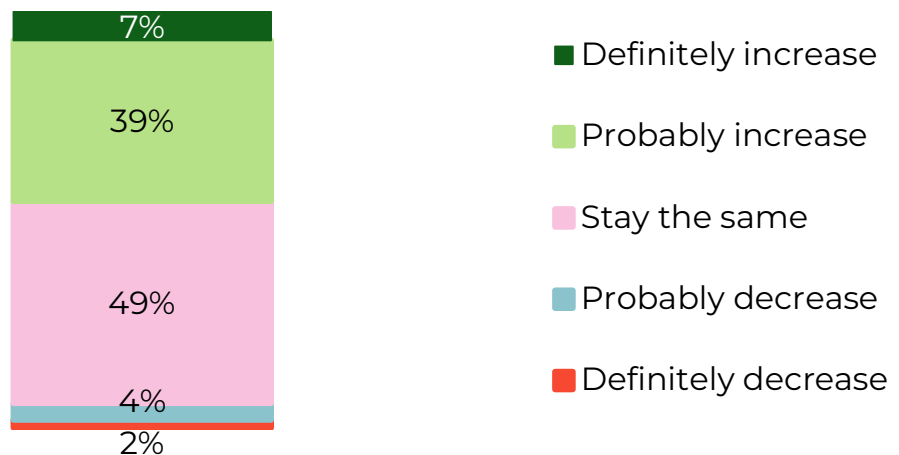
SA audiences are feeling positive, with 4 in 10 expecting to attend more than they did, pre-pandemic

Things are slowly improving, and nearly of SA audiences say they expect to increase their current level of attendance over the next year.

4 in 10 (39%) said their current level of attendance will probably increase, while 7% said it definitely will.

Another 5 in 10 said their attendance levels will stay the same (49%), while only a small proportion expect their attendance will probably (4%) or definitely (2%) decrease.

Figure 5: Over the next 12 months – do you see your current level of attendance at cultural events and activities changing? SA audiences (n=698)



Behavioural trends

Some SA audience members said there's been a change to their preferred time, day or location of events since COVID-19

When asked whether their preferences in the day, time or location of events have changed, 1 in 5 (19%) of SA audiences said they have – consistent with the national average (19%). Meanwhile, the majority (72%) said they have not.

The reasons for these changes varied from person to person, covering a range of complex factors like flexible work patterns, lifestyle changes, ageing and COVID-safety.

One change in preference often given by SA audience was opting to avoid 'peak times' or crowded and indoor venues. One said,

'I now live in the country and so it is harder to go out at night in the city. I also don't like crowded venues, and so [I] hesitate to go to operas or popular shows with seating inside. I am happy to go outside and sit anywhere.'

Many are opting for shows during the day, with one respondent saying,

'[I] prefer during the day or late afternoon rather than evening, because [I] do not like getting home too late and interfering with mealtimes.'

However, it will be important for arts organisations to hold events at a variety of times to suit diverse audiences. One respondent said,

'The move to earlier times for some performances is annoying, and difficult when working a 9-5 job. Catering [solely] to retirees is a self-limiting process.'

Others cited lifestyle factors, like working habits and changes to interests, with one saying,

'[I] prefer weekdays, as I have flexible work hours post-pandemic.'

Another said,

'I've made a commitment to going out clubbing less, so I am more likely to go to cinemas or theatre shows on Friday and Saturday nights than before.'

Qualitative data suggests that last-minute ticket-buying remains a trend to watch out for

Data from the August 2022 'Pulse Check' suggested that last-minute planning was likely to be another pandemic holdover – with SA audience members most likely to be booking for events within the next seven days (29%) and the next 2-3 weeks (42%).

Some cited having an unpredictable schedule preventing them booking in advance, with one saying,

'The only thing that stops me attending at the moment is not having transport and my work hours are all over the shop, changing daily so it's very hard to book anything.'

Another said,

'We have booked tickets to see Sting in February. Anxious about what will be happening by then!'

It seems likely that for some SA attendees, the changes brought about by COVID-19 will have lasting impacts on their attendance behaviours – and there may be a need to plan accordingly.

SA audiences are most likely to be staying local to attend events – 1 in 10 recently attended events outside their region (10%) or state (10%)

Audiences who had attended arts and cultural events in the last fortnight were asked where these events were located.

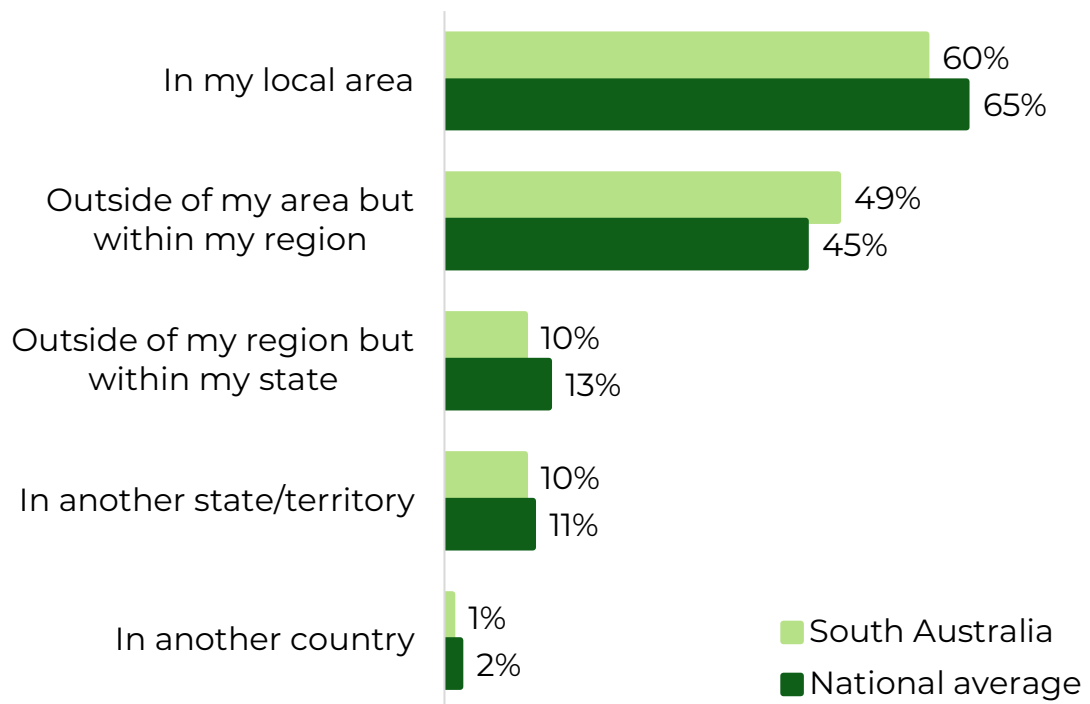
Six in ten SA audience members had attended events in their local area only (60%), while around half (49%) attended outside their local area but within their region – slightly higher than the national average (45%).

Further, 1 in 10 (10%) SA audiences travelled outside of their region but within their state to attend a cultural event recently, relatively consistent with the national average of 13%.

One in ten (10%) SA audience members had recently attended an event interstate, consistent with national trends. One said,

‘Throughout the COVID experience, there has been a strong focus on local – which made good sense and felt right. After nearly three years of a focus on local, I am feeling a bit parochial and really keen to see and experience things that bring a new perspective. I really want to travel for art and culture but don't feel comfortable doing so yet.’

Figure 6: Were any of the activities you attended in the past fortnight outside of your local area? (select all that apply). SA audiences (n=503) and national audiences (n=3,934)



Barriers

Financial reasons are now the top barrier to attendance – inhibiting 43% of SA audiences and the highest of any state

When asked if anything was likely to prevent them from attending as they used to over the next 12 months, SA audiences were most likely to name 'financial reasons' (43%, up from 25% in August), as shown in Figure 7). This rate is the highest of any state/territory, consistent with QLD audiences (42%).

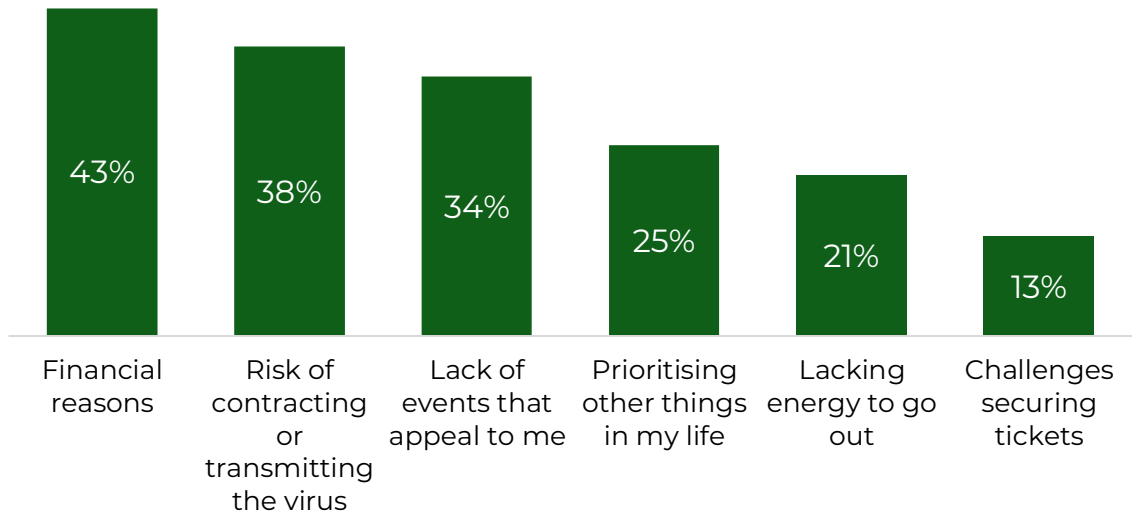
The trend is a departure from previous phases, when the risk of the virus outstripped financial barriers (38% named the virus as a barrier in October, down from 44% in August 2022). One SA audience member said,

'My attendance at cultural performances depends on costs. If necessary, I choose the cheapest seats, but sometimes they are too expensive.'

Another said,

'I love to attend arts/cultural/performing arts events more often but with the cost of living increasing – so are the prices to attend these events, making it unaffordable for a family of 5.'

Figure 7: Still thinking about the next 12 months... 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, October 2022 (n=697)



Other key factors at play are lack of appealing events (34%), prioritising other things (25%) or lacking energy to go out (21%)

New options introduced in Phase 8 explored the complex factors affecting attendance in the 'new normal': physical fatigue from COVID itself, mental fatigue from the anxiety and uncertainty of the past three years, new and competing priorities such as spending time with family or domestic/international tourism, and changes in the availability of events.

1 in 3 (34%) SA audiences said they perceived a lack of appealing events, consistent with national averages. One said,

'Current offerings are safe, middle of the road events such as musicals, not at all appealing.'

Another said,

'There hasn't been much on either locally or in the city that appealed to me, or they were on weekday nights in Adelaide, which makes it harder for me to attend.'

The long tail of the pandemic continues to impact audiences in terms of energy levels, with one-fifth (21%) citing physical and/or mental fatigue, or 're-entry' anxiety. One said,

'It's also about energy to attend events, living with the uncertainty of potentially catching / having the virus or flu, takes a toll.'

1 in 10 (13%) mentioned challenges securing tickets, and qualitative data suggests for a range of factors, including limited accessibility seating at venues, challenges navigating ticket sales websites, and limited spots and show times. One said,

'Some tickets are very pricey and sometimes hard to obtain with limited seating [and] only one show available.'

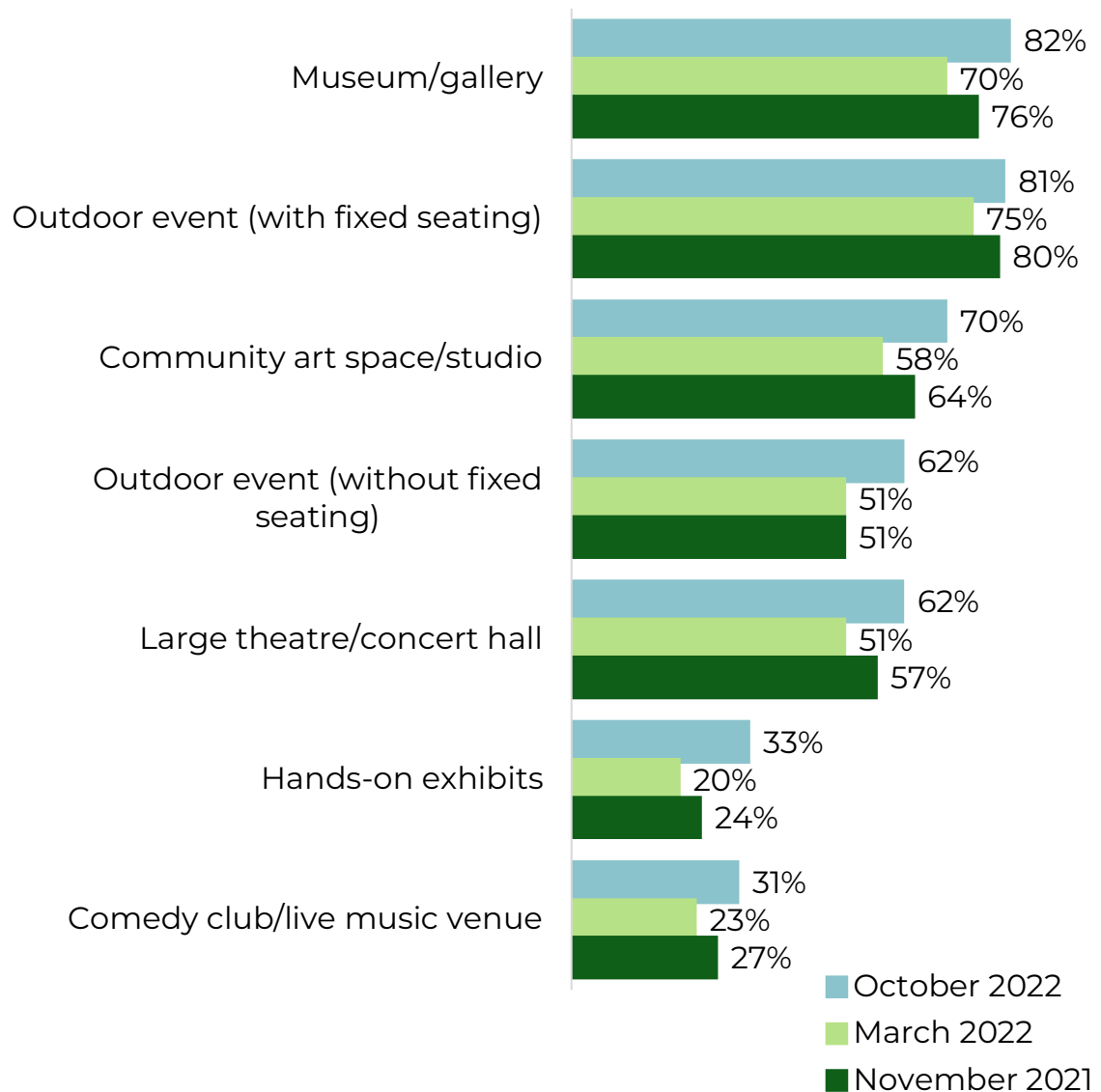
Comfort and COVID-safety

Most venues are seen as safe and comfort at live music venues and interactive exhibits is at an all-time high

After taking a hit in March, comfort has recovered in October, with the majority of SA audiences 'very comfortable' attending most types of arts venues, including museums and galleries (82% 'very comfortable', up from 70%), outdoor events with fixed seating (81% 'very comfortable', up from 75%), and large theatres and concert halls (62%, up from 51%) – as shown in Figure 8.

While typically considered riskier by audiences, the level of comfort with hands-on exhibits (33%, up from 20%) and comedy clubs or live music venues (31%, up from 23%) has increased.

Figure 8: Proportion 'very comfortable' attending cultural venues. SA audiences, November 2021 to October 2022 (n=00)



As isolation rules relax, COVID caution continues to inhibit 4 in 10 SA audience members

As discussed previously (Barriers), COVID-19 remains a barrier for some audience segments. While smaller than recent phases of data collection, such as August 2022 (44%) and March 2022 (57%), a sizeable proportion (38%) of SA audiences continue to say the risk of contracting or transmitting the virus will prevent them from attending cultural events.

There are several factors at play, including personal health vulnerabilities, the effects of long COVID, fatigue and [the newly scrapped isolation rules](#). One said,

'I live with significant disabilities, and chronic health issues, which has affected my ability to attend events, and participate in community activities greatly, due to risk of COVID, and being immunocompromised.'

This proportion is particularly high for SA audiences who are immunocompromised or vulnerable to COVID-19 (66%), or have someone in their household (66%) or network (47%) who is.

Most SA audiences are using their own discretion around COVID-safety, and opting to wear masks when necessary

In October 2022, audiences were asked, 'What are your current feelings about wearing a mask in cultural venues in your local area, where masks are optional and not required?'

The majority of SA audiences said they 'may or may not wear a mask, depending on the situation' (64%). One said,

'My confidence and arts aspirations have returned to what they were pre-pandemic. I'm not likely to alter my behaviours, other than always carrying a mask and making an assessment whether I 'need' to wear it.'

Under one fifth (16%) say that they 'always wear a mask' – consistent with the national average (17%). It appears that that despite relaxed restrictions, most SA audiences are willing to implement safety precautions based on their perceived level of risk.

Conversely, one fifth (20%) say they 'never wear a mask.'

Programming preferences

SA audiences are keen to return to the things they love, but there is an appetite for new and uplifting cultural experiences

In terms of content, over the next year SA audiences generally agree they want to attend things that they used to attend in the past (82%), with many striving to make up for lost time (Figure 9). One said,

‘I will continue to attend events, classical music, operas, exhibitions, wine-related events, and other performances that suit my taste and importantly, my budget.’

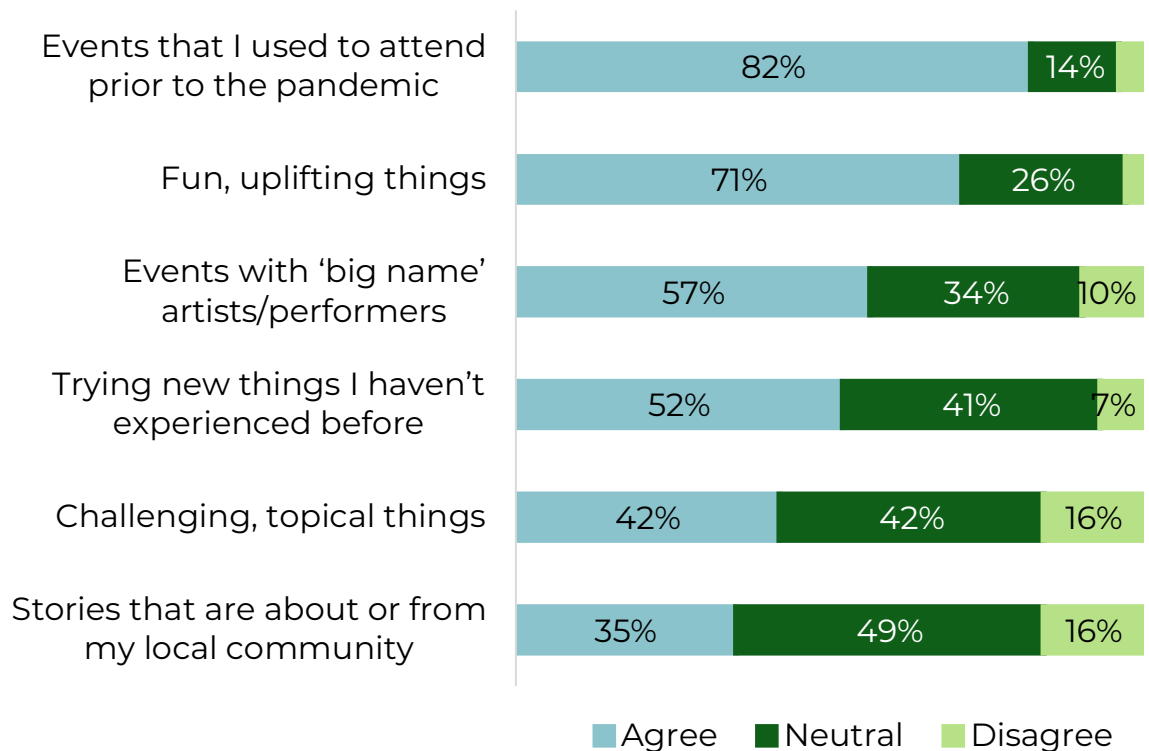
Half (52%) have an appetite to experience new content, as one said,

‘I love seeing new and interesting acts.’

Another said,

‘Always looking for something different.’

Figure 9: In the coming year, I’ll be most attracted to ... SA audiences (n=691)



71% agree they'll be most drawn to fun, uplifting things and 42% to challenging things, confirming the need to continue balancing programs

Seven in ten of SA audience members (71%) agree that they'll be most attracted to fun, uplifting things over the coming year – a continuing trend that suggests strong demand for connective, morale-boosting and light-hearted experiences. One said,

'I think that COVID and other world events has affected how we look and value our lives. I think with recent government elections the community has shown a desire for a positive and optimistic outlook on life. We want experiences that make us feel good about ourselves and connected with others.'

4 in 10 (42%) agree that they'll be drawn to topical, challenging content, signalling that while most want content that offers reprieve from the adversity of the last few years, there is a need to continue offering varied, balanced programs. One said,

'I'd prefer to be challenged and feel that our community is richer for it when it is challenged. Providing raw artists with a platform to set a new aesthetic tone for what is to come is our only way forward.'

Over half of SA audiences will be attracted to 'big name' artists (57%) – while some are prioritising quality over reputation

Over half of SA audiences (57%) agree that they'll be drawn to events with 'big name' artists and performers – consistent with the national average (56%). Some SA audiences are eager to see more touring and want notable works from interstate and overseas performing in their local venues:

‘More needs to be done to encourage well known artists to perform in Adelaide. We seem to miss out on some of the big name artists/bands.’

Another said,

‘[I’m] interested in events coming to regional areas, appreciate them making the effort to do so.’

However, a small proportion (10%) disagree, and qualitative comments suggest a perception that big names don’t necessarily equate to a high quality experience. One said,

‘Big names don't necessarily mean quality, I like to know that if I am paying top dollar for an event that it has quality artists engaged, not necessarily big names. I also like to support local talent, and hear local stories as well as those from interstate or overseas.’

One third (35%) of SA audiences will be attracted to stories about or from their local region

One third (35%) of SA audiences are also drawn to local stories from and by their local community – with some saying the pandemic has made them more appreciative of the value of local artists and storytellers. One SA audience member encouraged arts organisations to ensure,

‘Representation and stories that connect to our regional context. Project with good engagement at initiation. [It’s] best practice community cultural development.’

Others say they’re more motivated to support local talent over larger acts, with one saying,

‘I greatly enjoyed listening to music prepared by local classical musicians when borders were shut – I was reminded that they are fantastically talented and that I don't need to worry about going for the shows that always feature international artists – home grown is great!’

Online participation

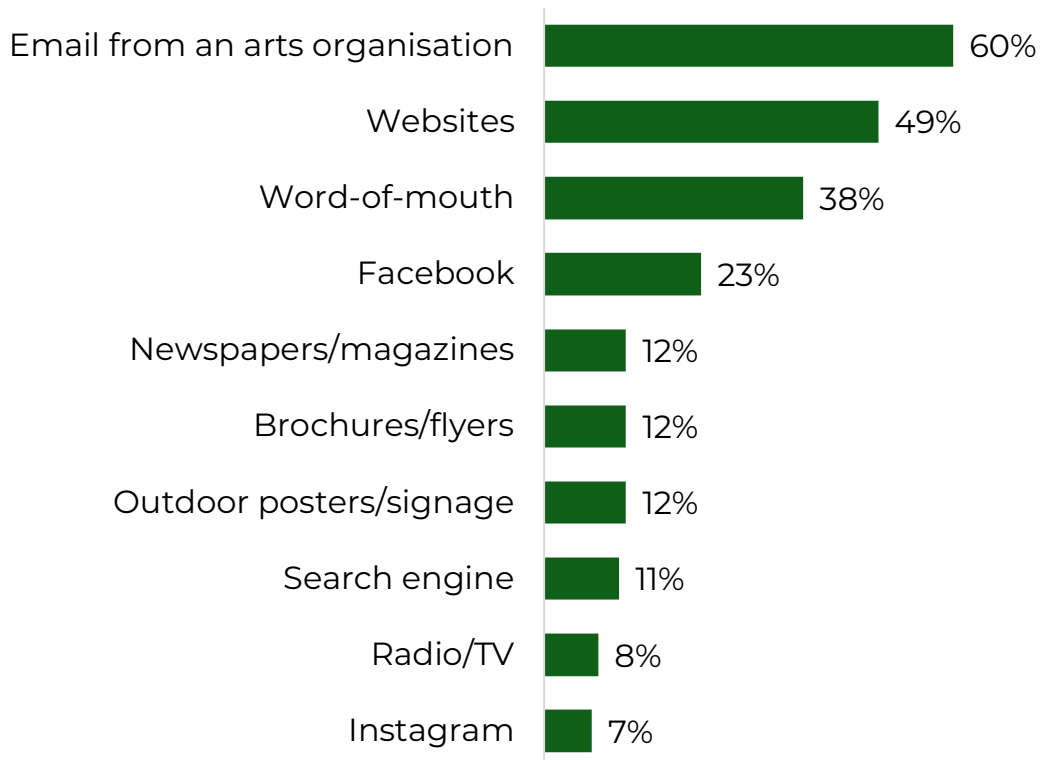
Websites, word of mouth and emails from organisations are key awareness channels for SA audiences of all ages

When asked how they found out about the most recent show or performance they attended in the past fortnight, 83% of SA attendees cited online channels, particularly direct emails from arts organisations (60%) and websites (49%), consistent with trends around the country.

For SA audiences under 35, websites (58%), word of mouth (48%), and emails from arts organisations (45%), as well as social media such as Facebook (24%) and Instagram (21%), were the most common sources of awareness.

Among older segments, emails from arts organisations are the dominant source of awareness, and audiences rely somewhat on word of mouth, websites, and social media.

Figure 10: How did you hear about the last show or performance you attended in the past fortnight? (select all that apply). SA audiences (n=517)



Online participation is steady, as 4 in 10 SA audiences continue to engage in digital arts activities – and one fifth are paying

Compared to November 2021 (42%) and March 2022 (38%), participation in online arts and cultural activities has been relatively stable among SA audiences in October 2022.

4 in 10 SA audience members (38%) participated in an online activity in the fortnight before data collection (12-16 October 2022), most likely pre-recorded video (19%) or online classes/tutorials (14%), followed by live-streamed performances (13%). A small proportion attended a virtual exhibition or museum/gallery tour (7%).

Online participation is highest among SA audiences with disability (55%), those aged 75+ (42%), or those with someone vulnerable to COVID-19 in their household (52%).

This data confirms a strong case for digital events to be part of organisations' Disability Action Plans.

Among SA digital arts attendees, spending remains stable: one third (32%) paid for an activity in the fortnight before data collection, consistent with 32% in March 2022. One third (33%) of those paying spent over \$50, down from 38% in March 2022.

Two-thirds of audiences see a role for digital experiences in their life, confirming its importance in overcoming barriers to live attendance

When asked about access requirements that would be 'helpful for attending cultural events', 1 in 10 SA audience members (9%) said that an option for digital participation would be helpful – confirming the need for digital programs to continue. One said,

'Between limited income, neurodiversity, and mental health, I'm not always able to get to on-person venues, or stay long in loud or visually noisy spaces.'

When asked about online arts and culture, overall a significant proportion continue to say that these experiences will play some role in their life (64%, slightly down from 68% in March 2022). One said,

‘Watching online enables me to access performances from interstate and overseas. Examples of ones that I’ve accessed include FOJAM from Melbourne and City of Asylum from Pittsburgh. I will continue to buy tickets for these remarkable and inspiring events.’

Another said,

‘Online has created opportunities that did not exist pre-COVID. I will always prefer to watch performances in-person but would actually prefer some education online to avoid ‘unnecessary’ contact. [My teenage daughter] has an online subscription to an interstate coach that she wouldn’t normally have access to which is fantastic. Also there have been opportunities for her to ‘attend’ online classes run by the Australian Ballet Company which is wonderful!’

Look out for the upcoming Fact Sheet on audience accessibility, which will explore the October 2022 findings and opportunities related to audiences with access needs.

The role of the arts in recovery

Returning to cultural events has enabled recent attendees to feel connected, inspired and enriched

In October 2022, recent SA attendees were asked, ‘What has it been like to return to the arts after COVID? What did you discover you missed?’

Some SA audiences expressed their excitement and appreciation for being able to attend live events, as one said,

‘I was nervous initially but now I am used to it. I had missed seeing live faces giving live performances – such a pleasure! I still appreciate this so much more than before the pandemic every time I go.’

One said,

'The joy of live performances – those special moments when the music fills the concert venue and you can see the musicians' expressions, even through their masks. Now that you ask, I've also very much missed applauding, and just love being able to show my appreciation of all the effort, skill, and 'divine inspiration' that go into making a live performance so wonderful and rewarding.'

Many people missed social and connective experiences at cultural events. One commented:

'The buzz! The joy of going to a theatre concert or musical and being surrounded by people who are enjoying it as well. Hearing them laugh, applaud etc.'

Another said,

'Great to be able to again attend events. Live events, attended with like-minded people, with whom I can socialise, discuss, critique, wonderful!'

Some respondents expressed their gratitude for fewer disruptions in SA relative to other states. One said,

'The arts scene in Adelaide was less badly impacted than Eastern states by the pandemic, so not as much was cancelled. But it has been good to return with a more relaxed feeling when attending plays, etc. and not having to wear a mask.'

Audiences are eager to support artists and cultural organisations as they rebuild

Looking ahead to the recovery process, SA audiences shared a range of positive messages for arts and cultural organisations. Several audience members shared words of encouragement, as one said,

'Every human needs art and music, it is soul food, so keep going and it will get busier as people become more confident about going out and mingling.'

Another said,

'Reach for the stars again, aim high with sophisticated, intelligent art and culture but of course, keep it affordable so we can attend and patronise as many of the arts and culture events performed. We need the Arts and Culture more than ever to inspire and change the myopic mindset of so many in our current social and political climate.'

Given the value and enrichment the arts bring to peoples' lives, audiences encourage arts organisations to continue advocating for better funding. One said,

'Be bold. Be adventurous. Give audiences variety and challenge. Support local artists and keep lobbying government for funding. "Without Art, life is Meh."'

Audiences encourage cultural organisations to continue building community connections, and ensure art is accessible and inclusive for all. One said,

'Engage with minority communities from a desire to learn from them what their needs and interests are. Encourage venues to cater for diverse audiences and participants.

Look for ways to enable low-income communities to engage with and patronise cultural and artistic activities and communities. Encourage venues to actively meet the needs of communities not usually active in their spaces. Accommodations for disabilities make spaces more inviting for everyone.'

Inclusivity will be key as the cost-of-living rises, as ticket prices will deter many from engaging with the arts and culture sector. One said,

'The biggest barrier is cost (and I respect you also need to earn a decent living). I would attend many more diverse events if I could afford them. sometimes it's the choice between a ticket and petrol in the car!'

What's next

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

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

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

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

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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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