



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 2

South Australia Snapshot

Audience Outlook
Monitor, July 2020



Government of South Australia

Department of the Premier
and Cabinet

Summary

The Phase 2 (July 2020) findings of the Audience Outlook Monitor in South Australia (SA) demonstrate an increasingly optimistic outlook, compared to findings in Phase 1 (May 2020).

The proportion of SA audiences that are ready to attend live events as soon as permitted has increased since May, from 24% to 33%. This is also higher than the national average (28%).

When ranking options for attending a cultural event today, most SA audiences would choose an outdoor event as their first (35%) or second preference (31%), although a significant proportion (32%) would select digital participation as their preferred mode of engagement.

Qualitative feedback reveals that many people are satisfied with the safety measures taken by venues and events recently, and several expressed appreciation for the sense of 'normalcy' that has been achieved.

However, for audiences that are more vulnerable to community transmission, social distancing remains important and improved communication about safety guidelines will reassure them that their health and safety is a priority, even while cases in SA are low. Following the approaches taken in Victoria (VIC) and New South Wales (NSW) may assist with scenario planning in the event of an outbreak.

Introduction

This South Australia (SA) Snapshot Report identifies insights from 1,578 survey respondents connected with SA arts and culture organisations participating in Phase 2 of the Audience Outlook Monitor.

Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving over 150 arts and culture organisations, including museums, galleries, performing arts organisations and festivals. Participating organisations simultaneously sent a survey



to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 2 results, from over 15,000 respondents, have been combined with Phase 1 data in a freely available dashboard. It's designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources like the dashboard, visit: www.thepatternmakers.com.au/covid19

Read on for the key Phase 2 findings in SA.

Current conditions

SA audiences are among the most confident nationally

Between May and June 2020, the number of confirmed cases of the virus nation-wide fell, and restrictions on events were loosened around Australia.

In SA, audiences are showing higher levels of comfort engaging in public activities in Phase 2 compared to Phase 1. The proportion that are at least somewhat comfortable to eat at a local restaurant increased from 72% to 94%, and those that are comfortable using public transport increased from 51% to 66%.

SA audiences are among the most confident nationally, along with Queensland (QLD), the Northern Territory (NT) and Western Australia (WA), where concerns about community transmission are lower than states/territories such as VIC, NSW and the Australian Capital Territory (ACT).

Returning to events

1 in 3 audience members in SA are ready to attend cultural events today

The proportion of audiences that say they are ready to attend cultural events as soon as permitted has increased in SA (33%, up from 24% in May 2020), and is higher than the national average (28%).



In the fortnight before data collection (8–12 July 2020), 30% of SA respondents say they attended a cultural event of some kind, which is higher than the national average (24%).

However, there are still some people who prefer to avoid cultural events right now. The proportion of SA audiences who cannot see themselves going out until there is no risk of transmission has remained stable since May 2020, at 9%.

When they return to cultural events, the majority of SA audiences plan to spend the same amount as before the pandemic (74%) and 8% are planning to spend more than before.

Some anticipate the pandemic will affect their attendance long-term

While the majority of SA audiences expect to attend cultural events at the same frequency as they did before the pandemic (72%), the proportion who expect to attend less than before has increased (23%, up from 15% in May). With more knowledge about the seriousness and potential duration of the pandemic, some are anticipating that their attendance behaviour will be affected for some time into the future.

SA audiences are most similar in their long-term outlook to audiences in VIC (23% expect to attend less), ACT (23%) and NSW (22%). Other states/territories are feeling slightly more optimistic, such as NT (18%) and QLD (19%), where there are no or low rates of community transmission.

More audience members are comfortable to visit cultural venues

Compared with attitudes in May 2020, SA audiences feel stronger levels of comfort walking around a museum or gallery (96%, up from 92%), visiting a community art space (91%, up from 86%) and attending an outdoor festival or concert (77%, up from 72%).

SA audiences are also demonstrating more confidence in attending venues seating 50 people (87%, up from 65%), 100 people (76%, up from 45%) or 500 people (49%, up from 26%), assuming they were open and following social distancing guidelines. Comfort levels with venues seating 250 were also probed in Phase 2 for the first time,

and 62% of SA audiences say they would be comfortable attending, compared to 52% nationally.

SA audiences are among the most comfortable attending seated performance venues

Compared to audiences nationally, SA audiences are among the most comfortable attending larger seated venues. A majority are at least somewhat comfortable to attend venues such as a large theatre or concert hall (69%, compared to 61% nationally) and a stadium or arena (56%, compared to 45% nationally). The proportion that are comfortable attending a venue seating 1,000 people is 40%, compared to 31% nationally.

When reflecting on different social distancing measures, audiences in SA are also among the most likely to feel comfortable in a venue with just two square-metres per person enforced (77%, compared to 64% nationally).

SA audiences who feel comfortable attending a more intimate comedy club or live music venue has increased (40%, up from 36%), but remains lower than seated venues at this time.

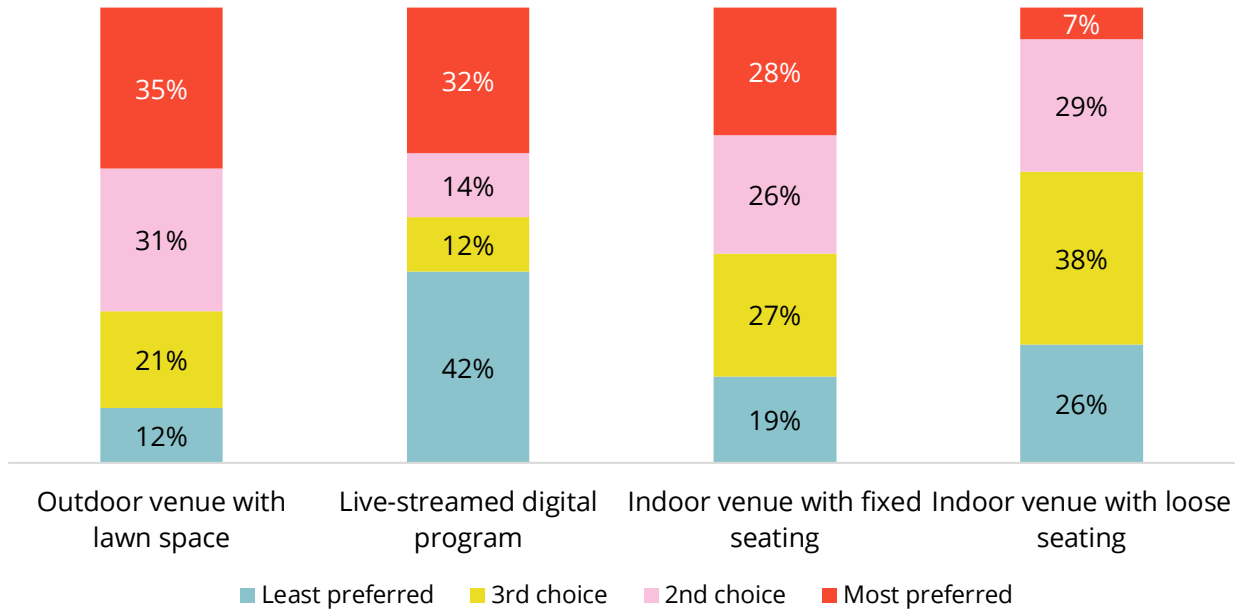
If given the option, SA audiences would prefer outdoor, open-air events

For the first time in Phase 2, respondents were invited to rank a number of options for attending cultural events today:

- ▶ An indoor, flat-floor space with loosely placed chairs for 100 people to spread out
- ▶ An indoor hall with fixed seating for up to 100 audience members seated according to current social distancing guidelines
- ▶ An outdoor venue with lawn space only (bring your own blankets or lawn chairs), assuming there is plenty of space for 100 people to spread out
- ▶ A live-streamed digital program that you can watch from home.



Figure 1: Rank the four options for attending a cultural event today (in order of preference for SA audiences). n=1,434



The largest proportion (35%) of SA audiences selected an outdoor venue as their first preference for attending a cultural event today. One person shared,

‘Assuming the weather is amenable outdoor is more pleasant and live is better than online. Outdoors it is easier to apply your own social distancing rules even if others are complacent’.

Several people expressed that outdoor would be preferred, with July weather permitting,

‘I miss the collective experience - being with a large group of people. I feel more comfortable outdoors with good ventilation, though the weather doesn't suit that right now!’

1 in 3 are favourable towards digital programs – but this option is polarising

The second largest proportion of SA audiences (32%) selected digital programs as their most preferred option for attending a cultural event today. Audience

commentary shows that this is viewed as the safest option for experiencing arts and culture. One SA respondent said,

‘I would only watch an event from my home. I will not be going out to one until there is a vaccine for COVID-19 or it is eradicated. COVID-19 is an airborne disease with a radius of 8 metres’.

However, 42% of SA audiences chose this as their least preferred option, indicating that while this option is safest, a large majority of people would prefer to attend an in-person, live event. One SA respondent mentioned,

‘Digital events are obviously the safest at the moment, but I much prefer to be at a live performance. Outdoor events have more space and fresh air’.

Several audience members expressed that digital experience does not offer the same value as live performances. One person shared,

‘I don't find digital gives me the same experience, I really don't enjoy it. I am comfortable with attending events with social distancing being practiced, as the risk appears currently low in SA’.

When attending indoor venues, SA audiences would prefer fixed seating over loose seating

SA audiences, like many across Australia, would prefer assigned seating when attending indoor venues, so as to better control social distancing. As one person shared,

‘I would prefer to have the seating pre-arranged to ensure social distancing is adhered to. Loose chairs enable people to set up what they like’.

Another person mentioned that while people are feeling confident, social distancing is integral,

‘I really miss the arts but as a doctor I feel it is too soon to be gathering without social distancing. If it's enforced like in an indoor setting with a person limit and they have to sit where they're told, that feels safer. I especially feel this

way if borders open and we have no control over who is coming in and out'.

Audience experiences

SA audiences feel generally confident in the safety measures taken by venues

As the number of virus cases remains low in SA, many respondents acknowledge that their recent experiences attending cultural venues have felt relatively 'normal', despite observing small changes. When asked what could be improved, one person shared,

'Everything was fine. Purchasing tickets online was the same as normal. Apart from seat spacing, it wasn't even apparent that there is currently a pandemic'.

Another said,

'It was pretty much back to normal other than only being able to purchase every second seat in the cinema and contact tracing details at ticket purchase. It was great to be back'.

Several people feel that venues are responding appropriately to the context, as one person commented,

'I think the gallery was doing everything appropriate to the current situation in SA where there is no community transmission'.

Limiting capacity is important in the successful application of social distancing

Social distancing enforced by limiting venue capacity is enabling attendees to feel most comfortable. When asked what worked well about their recent experience, one attendee shared,

'The seating arrangements and the purchasing of tickets online, minimising contact with others'.

Another person agreed, commenting,

'The theatre is small but seats are luxurious, big leather seats with a small table so you can bring drinks and snacks. They reduced the number of audience [members to] 1/4 of the max capacity'.

Despite the low risk, some audience members are concerned about social distancing

Some respondents expressed concern that social distancing is not being enforced in all venues, despite the low number of cases in SA. When asked what could be improved, one person commented,

'SA not having COVID-19 cases and [attendees] not feeling scared. People aren't social distancing when I'm trying my best to social distance'.

When asked what worked well during their last experience, another respondent shared,

'Honestly, I'm not sure anything did. It was a calculated risk on my part and I'm not sure how I feel after the fact. If SA were not in such a good position, I would not have attended'.

Clear communication will help reassure audiences that safety is a priority for venues

Several respondents shared that safety guidelines could be better communicated by the venue or event organiser. One person said,

'There was very little social distancing happening or being encouraged around the bar at the venue'.

Another person shared,

'There could have been a reminder to not attend if you were feeling unwell. It would also be good to know that you had the option to get a refund if you were unwell'.

With national results showing that audience sentiment can change rapidly based on community transmission rates, SA organisations must remain vigilant to mitigate the risk of transmission. Following the approaches taken in VIC and NSW may assist with scenario planning in the event of an outbreak.

Future attendance

Almost half (48%) of SA audiences are making plans to attend cultural events

More SA audience members are making firm plans to attend a cultural event of some kind (48%, up from 16% in May). Among those who have made plans, SA audiences plan to attend a cinema (25%) or visit a museum or gallery (24%), which are the types of venues that have reopened first in many locations.

Around the country, the proportion making plans to attend cultural events broadly follows consumer confidence about public interaction in general. For instance, the proportion making plans at present is highest in states/territories with no recent cases and high rates of confidence in border controls, such as the NT (66%) and WA (54%).

1 in 4 SA audiences are purchasing tickets for events less than one month out

Across the country, lead times for purchasing tickets are shorter than they were in May 2020, with the largest proportion of SA audiences buying tickets doing so for events less than one month in advance (28%).

However, relative to other states/territories, this proportion is smaller, particularly in comparison to the NT (53%), WA (43%) and ACT (41%). 1 in 5 (20%) are purchasing tickets for events in April 2021 or thereafter, which is consistent with the national picture.

Among those who have bought tickets, the most common price paid is between \$10 and \$25 (18%), consistent with the national average (20%).

Participating at home

Since May, SA audiences are continuing to participate creatively at home

SA audiences are continuing to engage in creative activities at home during the pandemic. This proportion is similar to May 2020, with a majority still listening to

music (90%, stable with 88% in May 2020), and making art or craft (40%, stable with 41%).

There has been a small uptake in reading for pleasure since May (87%, up from 84% in May), and this remains one of the most popular activities that SA audiences participate in at home.

Engagement in other activities has remained consistent, such as making music (24%, stable with May), creative writing (19%, stable with 18%) and making videos and doing photography (23%, stable with 24%).

Online participation has continued at a similar rate, but some activities are less popular

While the proportion of SA audiences engaging online remains high (71%), there has been a slight drop in certain online activities, such as doing online classes, courses or tutorials (27%, down from 34% in May), seeing virtual exhibitions (16%, down from 21%) and watching live streamed performances (38%, down from 41%).

However, the proportion watching pre-recorded performances has remained stable since May, at 48%.

At the time of data collection, SA audiences are slightly less engaged online than audiences in VIC (77%), NSW (76%) or ACT (74%), where restrictions are more stringent and opportunities to attend live events are fewer.

However, with a strong majority continuing to engage online, and some audience members only participating online, planning for digital distribution long-term remains important.

More people plan to continue participating online post-pandemic

While a slightly smaller proportion of SA audiences are engaging in certain online activities (71%, down from 74% in May) those who are participating are more likely to be participating more frequently than before (53%, up from 37%).

Several respondents shared that they are embracing the new experience of participating in a performance online, rather than in-person. One commented,

‘I wanted to see what the experience [of] a live streamed performance was like and I was interested in the process of buying a ticket, marking it in the diary and treating it like a live event’.

Further, a greater proportion of SA audiences say they plan to continue participating online, post-pandemic (71%, up from 67% in May). Online discovery of new artists and work has also increased among SA audiences since May 2020 (33%, up from 28%), confirming the importance of long-term thinking and investment in digital distribution.

Engagement in paid digital offerings has remained stable, but SA audiences are paying more

Compared to May 2020, the proportion of SA audiences paying for online arts and culture experiences has remained stable at 33%. The rate of donation has remained consistent (18%, stable with 19% in May), however, slightly more people are purchasing single experiences (14%, up from 11%).

When asked what their total spending online was, 36% have spent \$50 or more, which is a slight increase from May 2020 (29%).

Audiences were asked to share what made their online experience worth paying for. Several SA respondents shared that they were able to experience a show that would otherwise not be available in their state. One person commented on their purchase of a single experience,

‘The single experience was a stage show that had not come to Adelaide and the proceeds were supporting charity. It was worth paying for the online stream because the show was unlikely to come to Adelaide (otherwise live performance would have been preferred) and money was going to a good cause’.

Many other respondents shared that being able to financially support struggling creatives and organisations made the experience invaluable. The same SA respondent mentioned,

‘I also support artists through Patreon, their work is important and with the impact of COVID-19 on their industry, I think it is more important than ever to



contribute to support them to create their art however and wherever they are able'.

Another person shared that their contribution was worthwhile as it supported important social causes: '[It was worthwhile] Supporting Indigenous artists and Black Lives Matter artists from USA'.

Overall, many audience members expressed gratitude for being able to stay connected to arts and culture during the pandemic. One person commented,

'[It] replicated the feeling of attending a live concert, classical music....Helped me to feel connected to the music and the performers. It was more personal and intimate...really filled what would have been a huge gap in my life. [It] normalised this weird time'.

What's next

To explore the data in more detail and find out how audiences are responding, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19

There, you can access a range of Fact Sheets and 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.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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.

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

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