



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 3

South Australia Snapshot

Audience Outlook Monitor
September, 2020



Government of South Australia
Department of the Premier
and Cabinet



Summary

Phase 3 of the Audience Outlook Monitor in South Australia (SA) reveals that the proportion of SA audiences that attended a cultural event, of any kind, in the fortnight before data collection (2–6 September) has increased. Almost half (47%) of SA audiences have now returned to cultural events, as more venues and facilities reopen in the state, compared to 30% in July 2020.

Additionally, more SA audiences are making plans to attend cultural events compared to July (62%, up from 48%), and in particular, a greater proportion are making plans to attend a live performance (36%, up from 14%). There has been a slight increase in the proportion buying tickets (24%, up from 10%) and lead times are short in SA: around three-quarters (78%) are buying tickets for events less than one month out.

SA audiences are among the most confident about most forms of public interaction, such as using public transport (67% stable with 66% in July) and eating at a local restaurant (95%, stable with 94%).

However, venue safety continues to be important. Slightly more people would be encouraged to attend if face masks were mandatory (49%, up from 30% in May 2020) and support for temperature checks upon entry has also increased (66%, stable with 62%). Commentary from survey respondents indicates that when attending events in future, many will prioritise venues that take preventative measures seriously.

SA audiences continue to favour outdoor venues for attending a cultural event, and the proportion who rank this as their first preference has increased slightly (39%, up from 35%). However, there is still a sizeable proportion (24%) that prefer digital programs right now, as some SA audiences remain cautious about live attendance.

Cultural organisations can look forward to continuing their engagement with SA audiences via digital offerings, even while restrictions on public gatherings have begun to ease locally. Although participation in most activities has dropped slightly, the proportion who plan to continue after the pandemic has increased, from 71% to 78%. On which online activities they'll prioritise paying for, SA audiences commonly mentioned work they would not normally be able to see, as well as supporting artists and organisations that have been negatively impacted by the pandemic.

Introduction

This SA Snapshot Report identifies insights from 969 survey respondents connected with SA organisations participating in Phase 3 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 around 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 3 results, from over 12,000 respondents, have been combined with Phase 1 and 2 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 3 findings for SA.

Current conditions

SA audiences remain confident with public interaction

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission. SA audiences are appearing to navigate public places with consistently high levels of confidence, on average, compared to July 2020.

Most activities are viewed with similar or slightly higher levels of confidence, such as using public transport (67% feel comfortable, stable with 66% in July 2020), eating at a local restaurant (95%, stable with 94%), and exercising at a gym or fitness studio (64% feel comfortable, stable with 63% in July).



The proportion who feel comfortable flying domestically on a commercial airline has increased slightly (52%, up from 46%), potentially as there have been few or zero cases in SA in recent months.

Returning to events

Around half of SA audiences have returned to a cultural event recently

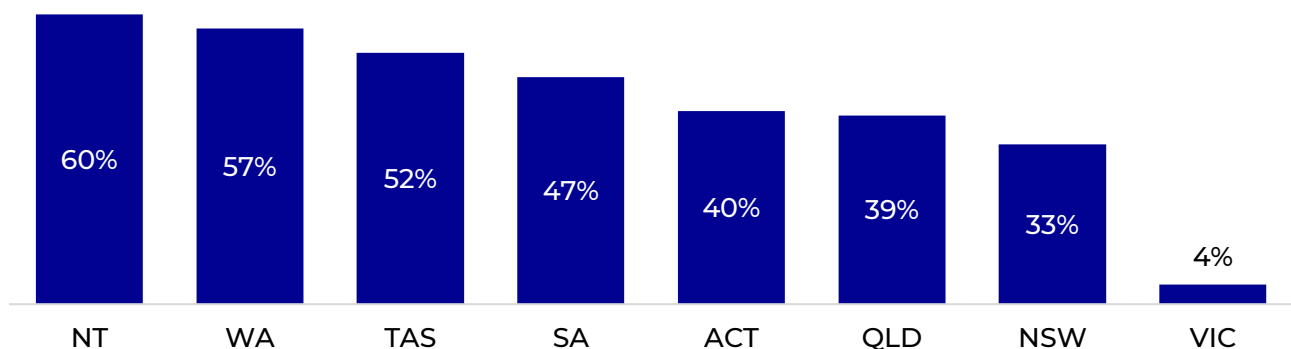
The proportion of SA audience members who attended a cultural event, of any kind, in the past fortnight has increased from 30% in July to 47% in September, as more venues and facilities reopen.

The most common venues that people are reattending are cinemas (19%, up from 13%) and museums and galleries (21%, up from 14%), which are the most common types of facilities to be open consistently.

Rates of attendance at live performances have grown significantly since July (12%, up from 4%), due to more events returning to stages and venues. There has also been notable growth in attendance at lectures, artist talks and workshops (15%, up from 6%).

Figure 1 displays the proportion of audiences who have attended a cultural event recently in each state/territory.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? By state/territory of participating organisations (September 2020).



3 in 4 SA ticket buyers are buying tickets less than one month out

In SA, more past attendees are making plans to attend an event of some kind in future, increasing from 48% in July to 62% in September 2020. By comparison, audiences in New South Wales (NSW) and the Australian Capital Territory (ACT) are demonstrating more caution, with around half of audiences making plans to attend an event — in Victoria (VIC), just 20% are making plans.

In terms of artforms, the proportion of SA audiences making plans to attend a live performance has grown the most strongly in the past two months, with 36% planning for this right now, up from 14% in July.

The proportion who are buying tickets has also increased, from 10% in July to 24% in September, and three-quarters (78%) of ticket buyers are purchasing tickets for events less than one month out. The proportion who spent more than \$50 on tickets has also grown from 12% in July to 20% in September.

Attitudinally, 1 in 3 SA audience members are ready to reattend venues and events

In September 2020, results show that one-third (33%) of past attendees in SA are 'ready to attend cultural events as soon as permitted', an increase from that observed in May 2020 (24%) and consistent since July (33%).

SA audiences are most similar in their outlook as audiences in Queensland (QLD) (32%) and by comparison, readiness to attend is highest in the Northern Territory (NT) (42%), Western Australia (WA) (40%) and Tasmania (TAS) (40%), where many restrictions on live events have eased and cases of community transmission are low.

SA audiences are increasingly confident attending a range of venue types

In July, SA audiences were demonstrating high levels of confidence with outdoor venues. As summer approaches, the proportion who are at least somewhat comfortable attending outdoor events overall, has increased (85%, up from 77%).

Regarding specific activities, more SA audiences are now comfortable attending an outdoor music festival with no seating (52%, up from 49%), a street market or fair



(87%, up from 83%) and a performance seated in an amphitheatre (89%, up from 83%).

The proportion feeling comfortable with some types of indoor venues has also increased, including stadiums (67%, up from 56%) and large theatres and concert halls (79%, up from 69%). The proportion who feel comfortable attending comedy clubs or live music venues has been consistent (41%, stable with 40%), potentially due to concerns about the proximity of patrons in these types of venues.

SA audiences are showing similar, or higher levels of comfort with venues of all sizes, including those seating 250 people (74%, up from 62%), 500 people (60%, up from 49%) and 1000 people (46%, up from 40%).

Further probing about social distancing in Phase 2 showed that different social distancing arrangements would also have a greater effect on attendance. Currently, 97% of SA audiences would be at least somewhat comfortable to attend venues with 4 square metres per person enforced, 86% under a scenario of 2 square metres per person and 15% with no social distancing at all.

SA audiences have grown more supportive of the use of face masks

In May 2020, face masks were a polarising issue nationally, and SA audiences were divided on whether this measure would encourage (30%) or discourage (32%) them from attending cultural events.

Now, in September 2020, support for face masks has increased among SA audiences (49%), but they are among the least supportive nationally, along with audiences in WA (46%). By comparison, support for face masks is strongest in VIC (88%) and NSW (80%), where they have been more extensively adopted and enforced due to recent outbreaks.

Another safety measure with slightly more support in SA is temperature checking upon entry to venues. Around two-thirds (65%) of audiences say this protocol would make them more comfortable when attending events, an increase from that observed in May (62%).

Audience experiences

Most audiences are satisfied with venue safety

When asked to reflect on their experiences returning to cultural events, most SA audiences appear to be satisfied and have no or only minor suggestions for improving venue safety.

Many acknowledged the circumstances and expressed appreciation where venue staff had made extra efforts to make people comfortable and make the experiences as safe as possible. One person said,

‘It was extremely well organised. We distanced in the cafe from others, and washed hands before going. I can't think of anything that could have been improved. Social distancing, hand washing with soap and avoiding large crowds in general is wise under the circumstances’.

Several people appreciated the social distancing and other precautions taken at museums and galleries. One person said,

‘Galleries are generally spacious and clean environments. You also don't touch anything, and people usually keep their distance out of courtesy in general’.

Finding ways to gently enforce social distancing is important

SA audiences are demonstrating a slightly higher degree of caution at performance venues, compared to museums and galleries.

Among people in SA who recently attended a live performance, those who suggested areas for improvement were inclined to mention crowd management around entrances and exits, seating arrangements and social distancing. One person said,

‘Better distancing (chair setup with adequate spacing, traffic flow management at entry points in particular) and more access to hand sanitiser at all entry points’.

Communication continues to be key — and where staff can plan this proactively, it appears to work best. One person suggested,

'Exit strategy - when the show finished everyone filed out as close together as previous years'.

Future attendance

SA audiences are most favourable of events in outdoor spaces

Again, in Phase 3, audiences were asked to rank their preferred setting for attending a cultural event today, from a list of four options.

A slightly greater proportion of SA audiences rank outdoor venues as their first preference (39%, up from 35% in July) and this remains the top preference for SA audiences, on average. As summer approaches, preference for outdoor events has also grown elsewhere in Australia, such as in TAS (up 20%), ACT (up 8%) and VIC (up 7%).

SA audiences continue to show support for live-streamed digital programs that they could watch from home, as this feels the safest, though the proportion who put this as their first choice has dropped (24%, down from 32% in July 2020). As one SA respondent shared,

'Live streamed just doesn't cut it for me, I think it's important to allow disabled people access to more theatre, or for people that are sick, so they don't risk public health'.

A greater proportion (33%, up from 28%) of SA respondents rank an indoor, 100-seat venue following social distancing guidelines highest, and just 5% (stable since July) prefer an indoor, flat-floor venue with loose chairs and plenty of space to spread out as their first preference.

Many SA audiences are inclined to prioritise outdoor events in future

In Phase 3, audiences were asked, 'Is there anything you can tell us about the types of venues or events you'll prioritise, and how they may differ from prior to the pandemic?'

Although community transmission has been minimal locally, some SA respondents mentioned feeling confident in the safety restrictions in place at local venues, as one said,

‘I’m fortunate to live in South Australia where we have a low incidence of Covid-19 and many venues are operating again within the necessary restrictions, so I feel reasonably confident to go to events and restaurants’.

Several people mentioned prioritising smaller events with fewer attendees and outdoor settings, while some mentioned digital streaming. One person shared,

‘Smaller, perhaps even more digital events or streamable events — those, I think, I would prefer if and when a vaccine is developed and trialled accordingly. Perhaps events with no more than 50 people once a vaccine is in place, and ideally outdoor settings if possible to reduce the risk of spread via inhalation of aerosols in an enclosed space’.

While venue safety will be an important factor among SA audiences, some will be more conscious about spending on admissions, due to the financial implications of the pandemic. As one person said,

‘My selections will probably be based on price. Earning less, so less [money] to spend on going out. Outdoor festival type of events or something that gives a lot of output for minimal cost will probably drive my decisions in future’.

SA audiences are cautious about returning to events long-term

In May 2020, 15% of SA audiences said their future attendance will be negatively affected by the pandemic long-term. This increased to 23% in July and has remained stable at 22% in September.

Nationally, SA audiences are among the most likely to anticipate that their attendance will be negatively affected by the pandemic, along with audiences in the ACT (23%) and NSW (21%), where audiences are generally uncertain about the likelihood of future outbreaks.

By comparison, the smallest proportions of audiences saying their attendance will be negatively affected are in the NT (16%) and WA (18%), where audiences are reporting a sense of relative normalcy after months with zero or only small numbers of cases.

When they do return to cultural events, most SA audiences (76%) expect to spend the same amount as they did before the pandemic, 14% expect to spend less and 10% expect to spend more, consistent with the results in July.

Participating at home

SA audiences remain engaged with creative activities at home, both on- and off-line

Past attendees in SA are continuing to participate in creative activities while at home, such as listening to music (88%) and reading for pleasure (86%).

Smaller, but consistent, proportions are making art or craft (39%, stable with 40% in July) and making music (23%, stable with 24%). There has been a slight decrease in the proportions of SA audiences who are creating videos or photography (20%, down from 23%) and creative writing (14%, down from 19%).

Slightly fewer SA audience members are participating in online arts and cultural activities (61%), compared to July (71%) and May 2020 (74%). Nationally, SA audiences are among the least likely to be engaging in online arts and culture activities right now, along with audiences in NT (60%), WA (60%) and QLD (64%), potentially due to live experiences becoming increasingly available in these states/territories, as restrictions have eased.

Engagement in most online activities has dropped slightly in SA

In SA, participation in most online arts and culture activities has decreased slightly, including the proportion of people doing online classes, courses, and tutorials (23%, down from 27% in July). Nationally, the most consistent levels of participation have been in online video of performances and events, although this has generally decreased as more venues reopen. In SA, 40% are watching pre-recorded performances online (down from 48% in July) and 30% are watching live-streamed performances (down from 38%).

Virtual exhibitions and tours are appearing to attract a consistent level of engagement, with 16% participating in this activity currently (stable since July).

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance, 23% of SA audiences say they themselves have made a discovery in



fortnight before data collection (down from 33% in July), and 12% say they know someone who has (down from 15% in July).

Further, when asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 48% say they are engaging online more frequently, which is slightly lower than the rate in July (53%). However, among those who are engaging more frequently, the proportion who are planning to continue participating post-pandemic has increased (78%, up from 71% in July), indicating that long-term digital programming will be important for some audiences, even while live events resume.

Online participation appears to vary across different regions. SA audiences in outer regional and remote SA are less likely to be participating online (53%), compared to those in metropolitan (61%) and inner regional SA (61%).

Metropolitan SA audiences are more likely to be engaging more frequently than before the pandemic (49%), compared to SA audiences in outer regional or remote locations (37%).

1 in 4 SA audience members are paying for online experiences

When asked if they have paid for an experience online, 29% of SA respondents said they have, a rate that decreased from May (33%) and July 2020 (33%). The proportion of those making donations for online experiences has decreased (16%, down from 19% in May), while the proportion purchasing single experiences has increased (14%, up from 11% in May). The proportion who are subscribing to digital platforms has been consistent (8%, stable with 8% in May).

Spending levels have been relatively stable since July, with 1 in 3 (33%) having spent more than \$50 on digital experiences in the fortnight before data collection — a slight increase from the rate in May (29%).

When asked to describe what they'll prioritise when spending online in future, many SA audiences expressed that they would like to support artists and organisations hardest hit by the pandemic. One person commented,

'It is difficult to predict - but to date, I have been prioritising providing financial support to individuals or companies that I have a relationship with already, and who I know have been negatively impacted by the pandemic'



Others shared that they will be seeking events that they would not ordinarily be able to access in person, as one said,

'I have learned that online viewing of art galleries and museums, in particular, can be very satisfying and I would be prepared to continue this to some extent even when/if we get back to regular conditions again. I realise it's possible to 'visit' places I'd never normally get to'.



What's next

To explore the data in more detail and find out how audiences for your work 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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