

MARCH 2021

Fundraising & Support

Fact Sheet

Audience Outlook Monitor, Australia

↑ **44%** up from 37% in May 2020

feel strongly committed to supporting arts and culture organisations

⇒ **29%** stable with 28% for 2019–20

have donated to an artist or organisation in the 2020–21 financial year

↑ **76%** compared to 23% of infrequent attendees

of frequent attendees feel strongly committed to supporting the arts

41%

have donated at least once in the past three years

⇒ **45%** stable with 43% who were subscribed to the 2020 season in September

have purchased a subscription or membership for the 2021 season

52%

of those who haven't donated say they are likely to donate in future

↑ **90%** up from 71% in September 2020

of those who have purchased a subscription plan to renew next year

29%

are unlikely to donate but may buy gift vouchers or subscriptions

Summary

Overall, the March 2021 results of the Audience Outlook Monitor suggest that audiences have maintained or even increased their commitment to supporting arts and culture as the pandemic continues.

Donorship continues to be higher compared to pre-pandemic times, with 29% of audiences saying they donated in 2020–21, relative to 28% in 2019–20 and 19% in 2018–19.

Among those who haven't donated, around half (52%) say they are somewhat likely (43%) or very likely (9%) to make a donation to a specific artist or organisation that is important to them in future.

There are opportunities to consolidate and further leverage audience support during this time, through both financial and non-financial means. Strategies can be developed in relation to three key segments:

- ▶ **Past donors** are generally frequent attenders who firmly believe in the value of the organisations they engage with. Representing 41% of the audience, they're very moved by the plight of artists during the pandemic and are prompted to donate to help artists experiencing hardship. There may be opportunities to target this segment with new campaigns, increase their level of support or set up regular donations.
- ▶ **Potential donors** are those who haven't donated in the past three years but say they are moderately likely or very likely to donate in future. Representing 30% of the audience, they are also frequent attenders, but while many in this group feel strongly committed to supporting the arts, some feel they aren't in a position to help financially at this time. These audiences can be invited to show their support through non-financial means, e.g. by raising awareness through social media sharing or volunteering their time.
- ▶ **Unlikely donors** are audiences who haven't donated in the past and say they aren't likely to in future. Representing 29% of the audience, this group are more likely to be less frequent attenders and on average exhibit more moderate levels of commitment. They are more likely to engage with initiatives such as buying ticket vouchers or gift certificates to use in future, or purchasing a subscription or membership that could save them money.

As people are spending more time online since the pandemic began, digital fundraising is growing in importance. There are opportunities to continue improving and optimising email campaigns and donation requests during online ticket sales.

Audiences feel most compelled by personal, specific campaigns related to supporting artists or enabling arts organisations to help address community needs.

Introduction

This Fact Sheet outlines key findings about fundraising and support from the March 2021 phase of the Audience Outlook Monitor in Australia (Phase 4), based on 13,836 respondents. 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 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

The March 2021 results are freely accessible to explore in an interactive dashboard. Users can access the data for all 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 March 2021 findings related to fundraising and support.

Audience support levels

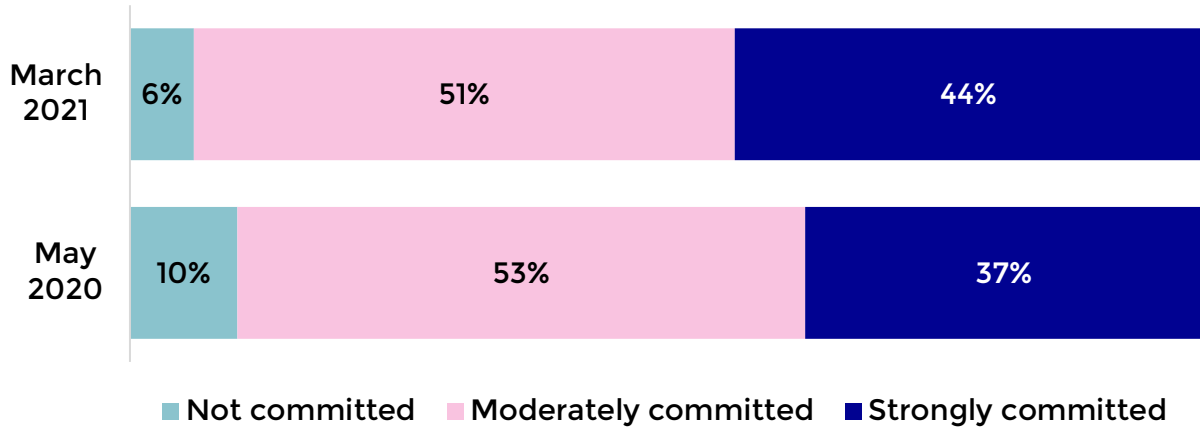
Almost half of audiences are strongly committed to supporting arts and culture organisations

The March 2021 results of the Audience Outlook Monitor suggest that audiences remain committed to supporting arts and culture organisations during the pandemic.

Compared to results from May of last year, a greater proportion of respondents said they are strongly committed to helping organisations that are important to them (44%, up from 37% in May 2020). A further 51% say that they are moderately committed to supporting arts and culture organisations, with only 6% of audiences (down from 10% in May 2020) reporting that they are not committed to providing support.

Overall, it appears that audiences are equally, if not more, inclined to support arts and culture organisations at present than in May 2020, when nationwide lockdown measures were in place – confirming this as an important time for consolidating and leveraging audience support.

Figure 1: Overall, how personally committed are you to supporting arts & cultural organisations that are important to you during the pandemic? n=6,907 (March 2021)

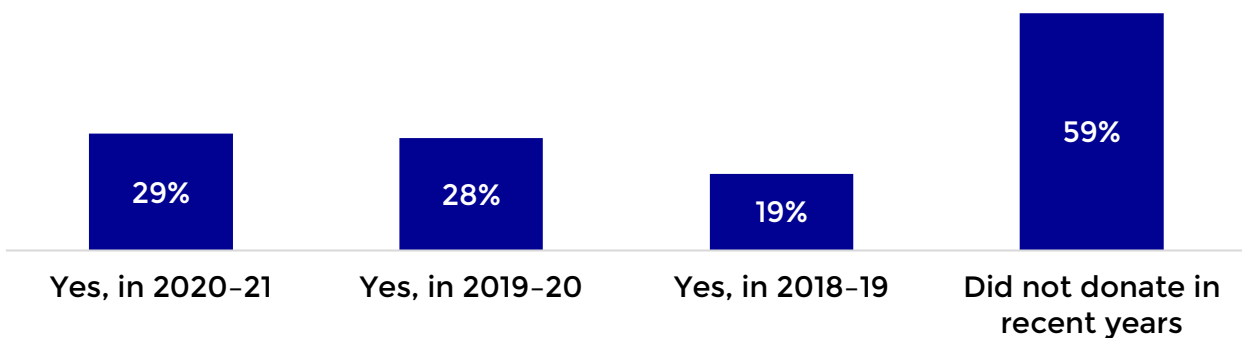


Donorship increases in financial years affected by COVID-19

The March 2021 results of the Audience Outlook Monitor also suggest that a greater proportion of respondents donated to artists and cultural organisations in financial years affected by the pandemic (28% in 2019–20 and 29% 2020–21) than those prior to the COVID-19 outbreak (19% in 2018–19).

With four months remaining in the 2020–21 financial year, it’s likely that donorship may exceed that of 2019–20 in the coming months.

Figure 2: Are you a recent donor to an artist or cultural organisation? (select multiple) n=11,899



Commitment to arts support and donorship is linked with frequency of arts attendance

As was noted in the May 2020 results, commitment to supporting the arts and donorship is linked with the frequency with which respondents typically participate. For both the May 2020 and March 2021 samples, the percentage of respondents who

were strongly committed to supporting arts and culture organisations was highest among those who frequently attend.

In March 2021, for example, 76% of the respondents who attended performing arts events very frequently (a couple of times a week) were strongly committed to supporting the arts, compared to just 23% of the respondents who attended performing arts events infrequently (a couple of times a year).

A similar trend is evident in arts donorship. According to the March 2021 results, 65% of audiences who frequently attend performing arts events reported donating in the 2018-19, 2019-20, or 2020-21 financial years, compared to just 20% of infrequent attendees.

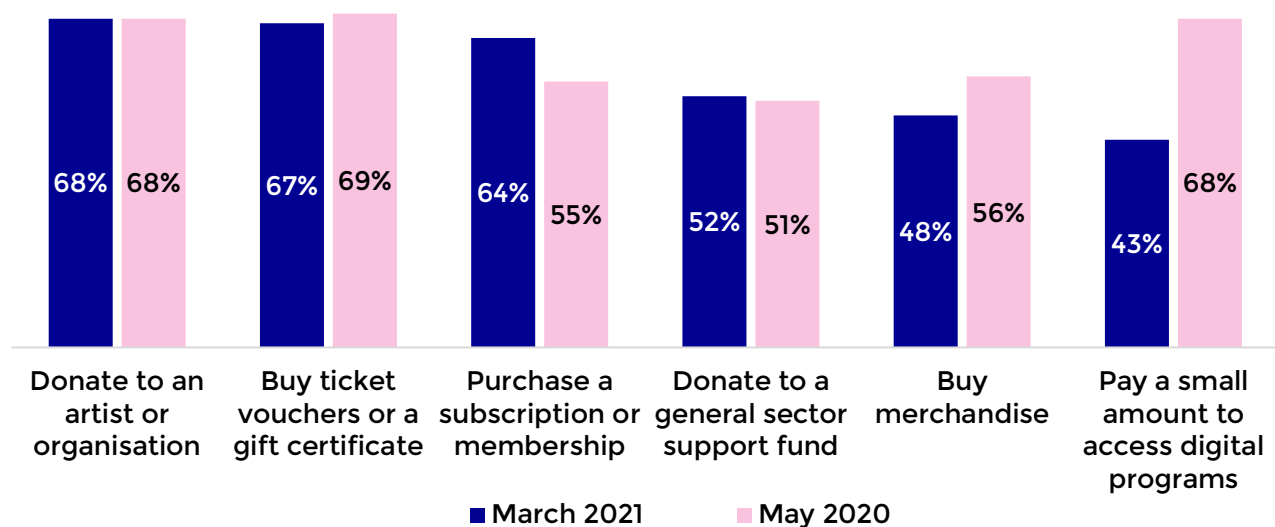
Two-thirds of audiences continue to say they are likely to donate

In March 2021, audiences were again asked whether they are likely to engage in different forms of support to artists and arts organisations in future.

The proportion who say they are likely to donate to a specific artist or cultural organisation has remained stable at 68%. Compared to May 2020, consistent proportions also say they are likely to buy ticket vouchers or gift certificates redeemable for future programs (67%, stable with 69%) or donate to a general sector support fund (52%, stable with 51%).

Fewer audiences are likely to buy merchandise (48%, down from 56%) or pay a small amount to access digital programs (43%, down from 68%).

Figure 3: How likely or unlikely are you to do each of the following to support one or more organisations in your community? n=6,576



More audiences are seeing subscriptions and memberships as a way to support sector recovery

As shown in [Figure 3](#), more audiences say they are likely to purchase a subscription or membership (64%) compared to May 2020 (55%).

A sizeable number (45%) of audience members say they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season. This is relatively stable with the proportion who reported having subscribed to last year's season (43% were subscribed in September 2020).

Among those who have purchased a subscription, 90% say they are planning to renew next year, which is an increase since September 2020 (when 71% had planned to).

Some audiences see these methods as saving them money in future, while providing some support to organisations they care about. For instance, one audience member explained their decision as '...recognising that membership was going to help them get established and stay in business during lockdowns'.

For many subscribers, the renewal process also represents an opportunity to consider a donation.

There may be an opportunity to refresh subscription/membership offers and messaging for 2022 as audiences look towards recovery.

Motivations for donating

Audiences are strongly motivated to support artists who have lost income

Qualitative data from March 2021 suggests that audiences are aware of the ongoing threat that the pandemic poses to the arts and culture sector, and in particular individual artists.

Although infection rates are low, audiences understand that restrictions, lockdowns and border closures continue to prevent artists from performing, exhibiting and participating in events.

The desire to help the industry sustain itself and compensate for loss of income was commonly cited as a reason for donation. For example, one respondent stated,

'Artists were deprived of an income - to keep them and their work alive, a donation similar to what I would have spent on tickets seemed the least I could do.'

Another shared their thinking:

‘My 3 friends and I had already paid for our subscriptions and opted to donate the ticket costs when their performances were cancelled. The theatres still had costs, the performers had no income - the whole sector was totally let down.’

With many audiences donating the value of tickets, arts organisations should anticipate donations decreasing as ticket sales recover.

Many audiences see a role for arts and culture in helping our communities recover

Right now a common reason for donating is a love of the arts industry and a belief that its cultural output can play an important role at this time. Many respondents made passionate appeals to the importance of the arts in both their own lives and society at large. One stated,

‘The need to support those in the arts is so clear and their value to us as a society and as individuals is also so important, that for me this support was a no-brainer.’

Another respondent offered a multi-faceted reason for donating:

‘My respect and love and need for what they do, the challenges they face making a living (let alone post pandemic) and my hope that they will always do what they do and continue making the world a better place.’

When asked in September 2020 how arts and culture organisations can assist communities with recovery, audiences responded with a wide range of beliefs and ideas. The themes in responses varied from reactivating public places, to transcending the challenges of today, reconnecting people and healing from the traumatic events of the pandemic. Browse a selection of responses at the [Visions for Culture](https://www.thepatternmakers.com.au/blog/2019/4/5/newdata-visions-for-culture) webpage: <https://www.thepatternmakers.com.au/blog/2019/4/5/newdata-visions-for-culture>.

Commitment to support may not translate to donations

As detailed in [Figure 1](#), the March 2021 Audience Outlook Monitor results suggest that 95% of audiences are moderately or strongly committed to supporting the arts. Notably, however, the data detailed in [Figure 2](#) suggests that 59% of audiences did not donate to an artist or cultural organisation during or before the pandemic.

People who are strongly committed but did not donate are more likely to engage in sharing words of support with others (e.g. by posting on social media).

There may be opportunities to indicate how this group, who feel committed but unable to donate, can show support by raising awareness, creating content or

volunteering their time. This group is also more likely to buy ticket vouchers or purchase a subscription or membership in future.

Facilitating donations

Personal, candid requests for assistance are prompting donations, particularly in relation to artists

In terms of the types of campaigns that are prompting donations, some audiences are most compelled to donate where their donation will help assist an artist who is struggling.

One respondent, for example, states that they were motivated to donate by,

‘...the organisation's personal request for any assistance; putting a face to the uncertainty faced by the sector.’

Another said they were compelled to donate based on the perceived relationship the organisation has with its community. They said, ‘[I donated to a] dance group that I feel uses donations to effectively help their artistic community, where my contributions seemed to make a genuine difference to others’.

Quality content is playing an important role in leveraging audience support

When asked what prompted their donation, some audience members mention a piece of content they enjoyed. One person said, ‘I was so pleased with the digital programme that was offered when live performances stopped’.

Another mentioned they were prompted to donate by an organisation who had ‘kept in touch with information and videos of artist and performances’.

The data confirms the importance of quality online content in relation to digital fundraising and the opportunity to invite donations on platforms where audiences access engaging digital arts experiences.

Email campaigns are particularly important at this time, along with the point of sale, though there is room to grow other platforms

When asked what specifically prompted their donation, some audiences mention making a donation at the point of sale, when they are purchasing a ticket or subscription, for example,

'I make an annual donation when I purchase season tickets. On the most recent occasion I increased the amount of the donation in view of the difficulties that they have faced due to the pandemic.'

For others, email campaigns appear to be catalysing donations, as one person explained,

'I had the money and I try to donate annually. So decided to give a bit earlier than usual. Contact prompts me. I don't give at a time when subscriptions are renewed because that time of year all are renewing subscriptions, and money is tighter.'

Audiences also mention other platforms prompting them to donate, including Patreon for independent artists, for example,

'I subscribed to their Patreon account as I had recently caught up with their content, really enjoyed it and wished to support them financially so they could continue to create more.'

With digital channels all in greater use since the pandemic began, it's important to continue investing in optimisation of email campaigns, donations during ticketing, and potentially raising awareness of Patreon and other platforms. At this stage in the pandemic, there are timely opportunities to leverage audience support and invest in development of relationships that will endure post-pandemic.

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

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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