Reaching audiences at home

Key findings from 8,728 participants in July 2021
Audience Outlook Monitor, Australia

44% down from 47% in March 2021

of all audiences are experiencing art and culture online

33%

of audiences in lockdown are doing creative activities at home more frequently

10% are 'Digital devotees'

see a 'substantial role' for digital participation in their lives long-term

33% down from 37% in March 2021

of those engaging online have paid for an online experience recently

42% are 'Selective but supportive'

see a 'small role' for digital participation in their lives long-term

44% up from 41% in March 2021

of those paying spent over $50 for online experiences recently

47% are 'Tired of tech'

see 'no role' for digital participation in their lives long-term

28%

accessed a digital activity at home with others in their household

wolfbrown

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Summary

Digital participation rates are lower than the early days of the pandemic, but key cohorts remain engaged

After a boom in digital participation in the early days of the pandemic (75% were participating online in May 2020), online engagement in 2021 is lower (44% in July 2021) and some audience members want to limit their 'screen time.'

This fact sheet identifies three key audience segments for digital participation: 'digital devotees,' who see a substantial role for digital in their lives, 'selective but supportive,' who see a small role, and 'tired of tech,' who see no role at all outside of lockdown:

- **Digital devotees** can be expected to show deeper and more dedicated engagement. 7 in 10 (70%) participated in arts and cultural activities online in the fortnight before data collection – and on average are more averse to attending in-person right now. More than half (51%) are paying for online experiences and half (50%) of those spent more than $50.

- **Tired of tech** audience members are eager to return to in-person attendance. Some report being 'screen-fatigued' and others say that after trying digital events, they just aren't that interested. However, during stay-at-home orders, some may still be willing to participate online in the absence of in-person alternatives. In metropolitan New South Wales (NSW), for example, which was locked-down at the time of data collection, 3 in 10 (31%) 'tired of tech' audiences participated online.

- **Selective but supportive** audience members feel favourably about online offerings but will generally only participate in the right events and under the right conditions. They are likely to favour digital events that are more convenient, more accessible or less risky than in-person alternatives. 6 in 10 (57% in July 2021) participated in the fortnight before data collection, while over a third (36%) paid to access online content.

Audiences in lockdown are getting creative at home – and may be more motivated to improve their mental health

Lockdowns and working-from-home policies have meant audiences are spending more time at home. Many audience members report taking up new pursuits during the pandemic or resuming old hobbies, and some say the pandemic has led to a renewed appreciation for the creative arts.

According to the latest data, arts audiences are participating in a wide range of at-home creative activities – including reading for pleasure (88% in July 2021), listening to music (89%), making art or craft (35%) and making music (18%).

A third of audience members are still doing creative activities at home more frequently than when the pandemic began (31% in July 2021 compared to 46% in May 2020). This increases to 35% in areas locked-down at the time of data collection, such as metropolitan NSW.

There are signs that audiences in lockdown are more motivated to engage with the arts to improve their mental health – and show support for arts organisations.

Getting creative at home, whether online or offline, helps audiences stay sane and feel connected to the culture sector

By presenting creative activities that can be done at home and shared with family and friends, arts organisations can help audiences stay creative and connected.

During lockdowns, marketing can emphasise connection, support and improving wellbeing. There are opportunities to invest in increasing the discoverability of online events and offering audiences prompts for at-home creative activities. Sustaining engagement during lockdown periods can also help strengthen relationships for the long-term.

Looking ahead, the data provides some indication of how the market for events may be affected by changing conditions. Offering events both in-person and online (or creating hybrid events) will provide audiences with ways to engage, regardless of changing conditions for physical gatherings.

Premium offerings can be more highly targeted to 'digital devotees': the small segment of audiences who will continue to engage deeply when events resume, and who exhibit greater willingness to pay for premium experiences.

Introduction

Since March 2020, Australian arts audiences have not been able to attend public events or cultural venues as they normally would. After experiencing periods of lockdown, and faced with uncertainty around outbreaks, many feel trepidatious about attending events, and some say their priorities have shifted for the foreseeable future.

Arts organisations have responded to the challenges of the pandemic by delivering digital experiences, such as live-streamed events and online courses. They are experimenting with digital technologies such as virtual reality and non-fungible tokens (NFTs). A range of innovative digitally-mediated products are also becoming available, such as audio-only experiences (e.g., AudioPlay and The Threshold) and parcels of art-making activities (e.g., MCA Art Parcel, State Library NSW Creative Kids Box).

This fact sheet looks at data from the Audience Outlook Monitor to examine the opportunities for engaging audiences at home in 2021 and beyond. It is likely that these opportunities will continue to grow and develop as the pandemic continues and as further innovation and product development takes places in the coming years.

More information about the Audience Outlook Monitor data reported is available on the last page, or you can visit the study home page at: https://www.thepatternmakers.com.au/covid19

Current engagement patterns

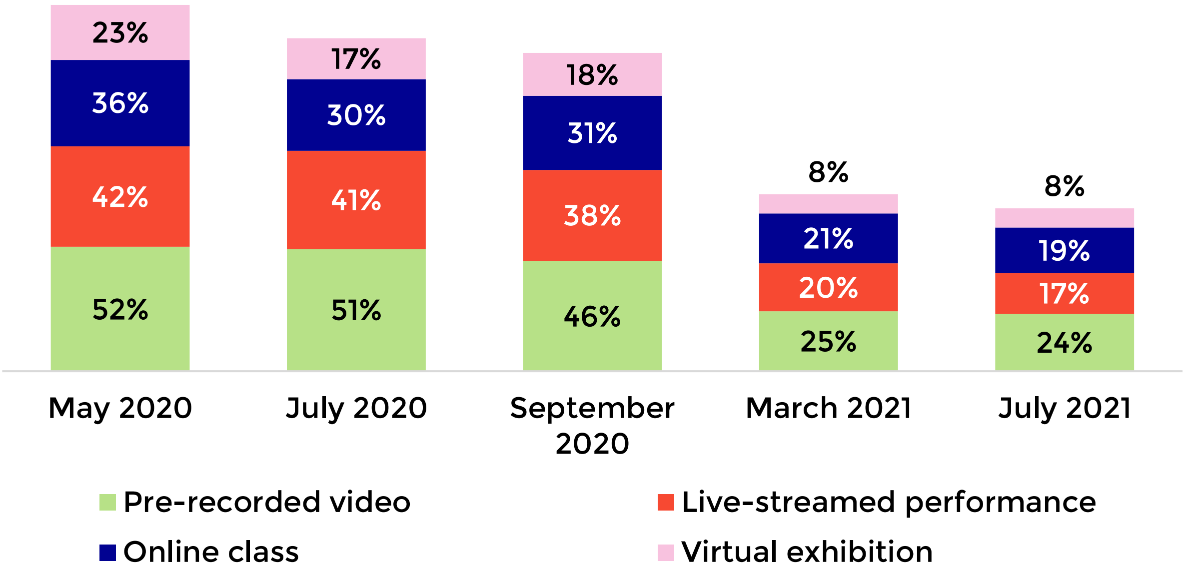
Digital presentation remains an important priority for the cultural sector, with 4 in 10 audience members continuing to engage online

In July 2021, just under half of all audiences (44%) participated in arts and culture experiences online in the fortnight before data collection.

Despite lockdowns in states like New South Wales (NSW), WA (Western Australia) and VIC (Victoria) before or during data collection in July 2021, the results did not show a return to the early pandemic 'boom' of digital participation (75% of audiences engaged with online experiences in May 2020).

Throughout 2021, audiences have continued to participate in all types of arts experiences at similar levels, including pre-recorded video (24% in July 2021, stable with 25% in March 2021), online classes (19%, stable with 21%), live-streamed events (17%, down slightly from 20%) and virtual exhibitions (8%, stable). With only small decreases in participation between March and July 2021, these results provide a more stable basis for long-term planning.

Figure 1: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). July 2021 (n=8,712)



Arts audiences are engaging in their own creative pursuits, with the majority reading for pleasure and listening to music

In addition to participating online, arts audiences are doing arts activities at home to stay creative and connected, especially during lockdown.

In July 2021, arts audiences were most likely to have read for pleasure (88%, stable with 87% in September 2020) or listened to music (89%, stable with 90%) in the fortnight before data collection.

Participation in other forms of home activity had decreased somewhat since September 2020. These include making art or craft (35% in July 2021, down from 41% in September 2020), making music (18%, down from 24%), making videos or doing photography (15%, down from 23%), creative writing (13%, down from 18%), collecting objects, artworks or artefacts (12%, down from 15%) and practising theatre or dance (7%, down from 10%).

Around a third of audiences are participating in at-home creative activities more frequently than before the pandemic

In July 2021, 3 in 10 audience members (31%) reported that they were doing creative activities at home much more frequently (4%) or more frequently (27%) than when the pandemic began. A further 6 in 10 audience members were doing at-home activities about the same as before the pandemic (62%), while only 7% were participating less frequently.

Time was a major factor for the audience members who were creating more, with widespread working-from-home and the 'slow time' of lockdowns meaning they had more time to invest in their own creative pursuits. One audience member said,

> 'Because I'm working from home, I have more time available. I have resumed playing the piano because it is also in my study and so I'm able to move straight from my office chair to my piano stool in an instant. I am able to dedicate time to piano practice now.'

Another said,

> 'I started writing a novel! I've wanted to do that for years, but never had the time. The pandemic has given me time and space to engage with creative writing, which I'm enjoying immensely.'

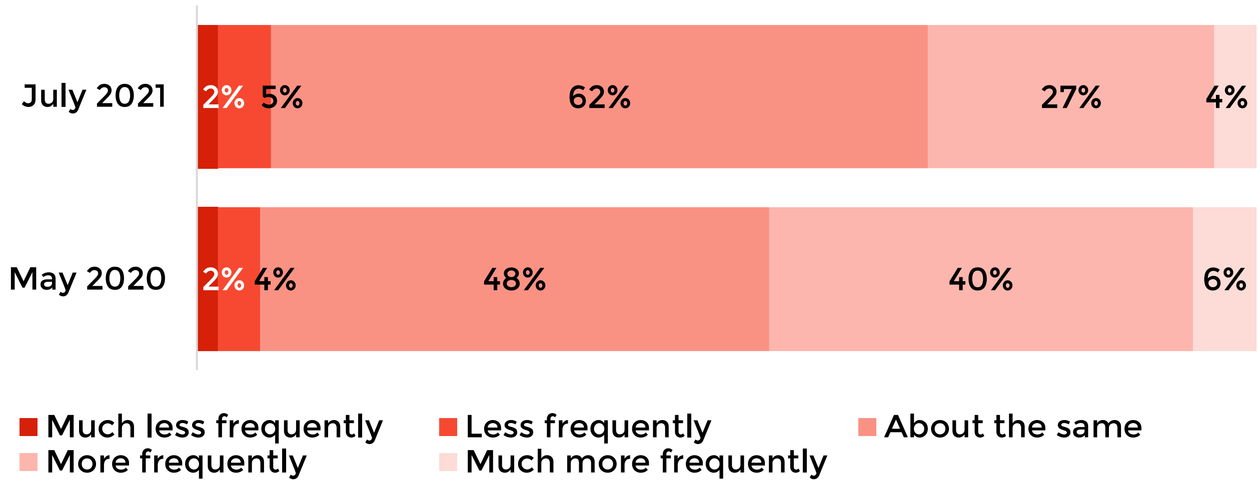
For audience members who are 'screen-fatigued,' at-home creative activities may offer a different way to maintain connections with artforms and creative institutions they love. One said,

> '[I'm doing] more reading. [I'm] sick of watching TV all the time.'

Although 31% of audience members are doing creative activities at home more frequently than before the pandemic, this proportion was down from May of 2020, when 46% of audiences reported doing creative activities more frequently.

Similar to trends in digital participation, where an early pandemic 'boom' gave way to more selective engagement, audiences may be finding they have less time for creativity activities outside of ongoing lockdowns – or have less motivation as outbreaks continue and 'pandemic fatigue' sets in.

Figure 2: Would you say you're doing creative activities at home...? May (n=8,538) and July (n=8,408)



Audiences in lockdown were somewhat more likely to be participating in creative activities more frequently than before the pandemic

The proportion participating more frequently was slightly higher in areas undergoing lockdowns at the time of data collection – such as metropolitan NSW, which had been locked down for around 2 weeks at the time of data collection (35%, compared to 31% of the national sample).

Some audience members reported taking advantage of the opportunities afforded by lockdown to try new creative activities. One said,

> 'I made my first item of clothing (through taking up dress-making) during the main lockdown of 2020, and my second during a lockdown earlier this year.'

Another said,

> 'I started learning the guitar during Melbourne's long lockdown in 2020 and practice almost daily.'

Other audience members suggested that stay-at-home orders and interruptions to in-person attendance had made them more aware of the ways they could connect at-home with creativity and culture. One said,

> 'Due to staying at home more I have increased my reading and my appreciation of listening to music.'

Another said,

> '[I'm] spending a lot more time reading due to the fact that lockdowns in Townsville were implemented and the mandate to wear masks everywhere – even outside on your own – has discouraged me from bothering to go out anywhere.'

Most are tuning in to online experiences alone, but there is room to grow 'social viewing'

When asked about whether they connect with others while engaging online, most people indicated they tune in alone (70%). However, at-home creativity and digital engagement have important social aspects.

Over a quarter (28%) said they had recently accessed an event/experience from home with other members of their household. 1 in 10 (9%) had tuned in as part of a physical gathering, another 9% had connected online with friends or family tuning in elsewhere, and similar numbers (12%) were gathering in public with others to experience the event together.

Comments from audience members suggested that they ascribe high value to these social viewing experiences. One said,

> '[I have participated in] interstate festival/concerts; musicals such as the Andrew Lloyd Weber series. Some family members are disabled, and online opportunities have been great for them.'

Another said,

> 'I was able to share the Digital Ballet Season with my elderly mother. I usually take her once a year to a live ballet performance, but we watched a few online together with my 20-year-old daughter as well. It was really a nice experience.'

While current rates of social viewing are lower than solo experiences, increasing the social connectivity of digital events would have a range of benefits for organisations and audiences.

Creativity at home can be a way to connect with friends and family

Similarly, comments from audience members suggest that at-home creative activities can be a meaningful and memorable way to spend time with friends, family and other members of one's household.

Audiences are participating in a wide range of creative activities together – one audience member reported participating in 'social writing groups,' another is 'playing zoom Bridge with friends,' while another is 'knitting and crocheting with friends.' One said,

> 'I'm teaching a private art class from my home. I create art to send to friends to cheer them up in Melbourne during their lockdown.'

Audience members also frequently reported creating at home with their children. One said,

> '[I've been] creating things to keep my young daughter entertained when we are stuck at home due to lockdown restrictions. E.g., making sensory activities, craft-based play, listening and dancing to music, reading with her, etc.'

Looking ahead

When asked what role digital experiences play outside of lockdown, three segments emerge

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

Approximately 1 in 10 (10%) are ‘digital devotees,’ saying that online arts and cultural experiences play a substantial role when in-person attendance is possible. Another 42% are ‘selective but supportive’, saying that they play a small role. Around half of audiences (47%) – the ‘tired of tech’ – suggest that digital participation will play no role at all in their lives.

Understanding more about each of these three segments, and their proportions, can help arts organisations develop targeted products and marketing campaigns. See a summary of these segments below and read on overleaf for more detail about each segment.

Table 1: Key characteristics of digital audience segments

	Digital devotees	Supportive but selective	Tired of tech
Online participation rate	70%	57%	26%
Live stream participation	39%	23%	7%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	51% paying	36% paying	18% paying
Risk tolerance	Most risk averse	Moderately risk averse	Least risk averse

	Digital devotees	Supportive but selective	Tired of tech
Demographic features	• More likely to be in a caring role (18%) • More likely to hold a post-graduate degree (48%) • More likely to have a disability (11%)	• More likely to be employed full-time (30%)	• More likely to live in a regional/remote area (25%)
Other arts behaviours	• More likely to earn a portion of their income from creating art (21%) • Attend performing arts very frequently (83% attend once a month or more) • Most likely to be donors to arts organisations (47%)	• Attend performing arts frequently (77% attend once a month or more)	• Least likely to be donors to arts organisations (30%) • Attend performing arts less frequently (71% attend once a month or more)

1 in 10 audience members are digital devotees who are willing to pay for premium online works

For the 10% of audience members who say online arts and culture play a 'substantial' role, digital participation is perceived to be a safer, more practical or more certain way for them to attend cultural events. One audience member reported,

> 'The pandemic has illustrated the potential for live performance to be shared with those whose location or life pattern prevents attendance. For example, a play or performance in Sydney that can be accessed by a person in the regions like me, by paying an amount that adds to the reward of the performers.'

Unlike other audience cohorts, participation rates for 'digital devotees' are holding steady – with 7 in 10 (70%) of these audience members participating in an online arts or cultural experience in the fortnight before data collection.

When it came to spending, this cohort was the most likely to have paid for an online experience (51% in July 2021) – compared to 36% of 'selective but supportive' audiences and 18% of those 'tired of tech.' Half (50%) of these paying 'digital devotees' were also spending more than $50 on online experiences.

These audience members have lower COVID-19 risk tolerance compared to the 'selective but supportive' and 'tired of tech' groups, who show a greater willingness to return to live attendance. When asked when they would be ready to attend live events, 46% of 'digital devotees' were adopting a 'wait and see' approach or could not foresee going out until there was no risk (compared to 33% of 'tired of tech' audiences).

When it came to other arts behaviours, 'digital devotees' tended to be frequent attendees to performing arts events (with 83% attending once a month or more in the year prior to the pandemic) and museums or galleries (with 50% attending once a month or more prior to the pandemic). Of the three digital audience segments, they were the most likely to earn a portion of their income from creating art (21%), and the most likely to be donors to artists or cultural organisations (47%).

'Digital devotees' were also the most likely to be in a caring role to older adults in their circle of family or friends (18%) or identify as a person with a disability (11%). One 'digital devotee' said,

> 'My mobility is decreasing due to a life-ending illness so hopefully online experiences will continue to be available as that will be the only way I can participate and enjoy.'

Educational attainment was also a predictor of an audience member's 'devotion to digital,' with 48% of this segment holding a post-graduate degree.

Selective but supportive audience members see digital events as a supplement to live events

4 in 10 (42% in July 2021) of audiences see a small role for digital participation in their lives. These 'selective but supportive' audience members are willing to participate in the right events, and under the right conditions. One said,

> 'I've attended some online events but they just aren't the same! Although, on some occasions it's meant I could attend something I would never have been able to in person because of cost and distance. So, swings and roundabouts!'

Another said,

> 'If there are things I can't physically get to because of personal circumstances, I'd consider an online option. I hope the online options that arose from COVID-19 continue for this reason. They've given me access to things I would otherwise never have accessed.'

During lockdowns or times of uncertainty, we can expect these audience members to look for online alternatives to in-person attendance. In July 2021, when we saw outbreaks growing, 6 in 10 (57%) 'selective but supportive' audience members participated online in the fortnight before data collection.

When it came to risk tolerance, these audience members tended to be more risk-tolerant than the 'digital devotees,' but more risk-averse than the 'tired of tech.' 6 in 10 (59% in July 2021) were prepared to return to regular attendance as soon as possible, compared to 67% of 'tired of tech' audiences.

Outside of lockdowns, we may see interest from this group drop off as they gain more confidence in in-person events – but if the Delta strain continues to circulate, some may prefer to continue participating online.

Over a third (36% in July 2021) of 'selective but supportive' audience members paid for online content in the fortnight before data collection. 'Selective but supportive' audiences may be looking for a lower price point for online content, compared to 'digital devotees'. Most paying audience members spent between $10 and $50 (49%).

For 'selective but supportive' audience members, the ease and convenience of online events make them a worthwhile alternative to in-person attendance. Of the three audience segments, 'selective but supportive' audience members were the most likely to be employed full time (30%). One said,

> 'I have a busy work and study schedule, so if I can't find time to see something live, I like having the option to purchase a ticket and watch a professional recording. Especially when the risk of lockdown and community transmission may still exist for some time.'

Tired of tech audience members are eager to return to live attendance, and generally won't be interested in digital offerings

A further 47% of audience members responded that digital participation played 'no role' in their lives when in-person attendance was possible. Around a quarter (26%) of these audience members had participated online in the fortnight before data collection – likely due to the impacts of lockdowns and restrictions on in-person attendance. In NSW, where an ongoing outbreak of the Delta variant was taking place, this rate was even higher (31%).

'Tried of tech' audiences had the highest risk tolerance at that time, with 67% ready to return to live events as soon as possible – suggesting that audiences most eager to return to live attendance are also those least interested in digital options.

As the participation data suggests, this group may attend in lockdown if it means they can connect with events important to them – and 2 in 10 may even pay for online events (18%, July 2021). However, they are unlikely to tune in post-lockdown.

For audience members who don't see a long-term role for digital programming, comments suggest that 'screen fatigue' plays a role in their diminishing interest, with one saying 'I'm completely over streamed events.' Others suggested that online events were unable to recreate the atmosphere and energy of live performances. One said,

> ‘Digital performances defeat the whole purpose of the word "live". The atmosphere is not there. Actual "live" performance is the alternate/balanced option to staring at a screen all day (i.e., for work).’

Another audience member said:

> ‘I cannot watch any more digital theatre – I’m all tapped out and have disengaged sadly from the platform.’

Compared to the other digital audience segments, ‘tired of tech’ audiences were more likely to live in regional/remote areas (25%, compared to 18% of digital devotees). ‘Tired of tech’ audience members were also the least likely to be recent donors to an artist or cultural organisation (30%).

Current opportunities

During lockdowns or times of uncertainty, market your digital offerings broadly, emphasising connection

Based on the data, arts organisations can expect greater uptake of online events during lockdowns or when the virus is circulating in the community – even from audience members who say they are ‘tired of tech.’ In NSW, for example, where an ongoing outbreak was taking place at the time of data collection, 31% of ‘tired of tech’ audiences participated online.

Less than 1 in 10 (6%) of audience members (down from 9% in March 2021) would select a digital program as their first choice for attending a cultural event today. However, this rate increases to 43% (down from 58% in March) for audiences who don’t foresee going out ‘until there is no risk’ of contracting the virus. One person shared,

> ‘Because what people do is so unpredictable (even when there are rules in place), having live streaming means that I can actually know that in practice I will be appropriately distanced from people. Plus, live streaming is so much more accessible (for people with disability, parents, regional people, etc); so I’m very into doing that on a practical but also equitable level.’

Lockdowns are a time to go broad with marketing to your whole audience base, and emphasise connection, as audiences are looking for ways to stay engaged with arts and culture. With audiences participating in creative activities at home off-screen as well as on, you may even want to consider offering prompts for at-home activities.

Outside of lockdown, consider hybrid events and work towards strategic premium offers for 'digital devotees'

Outside of lockdown, look to your 'selective but supportive' audience members and your 'digital devotees.' At this stage in the evolution of the digital market, there is a sizeable cohort (47%) of 'tired of tech' audience members who are simply not interested in online offerings when in-person options are available – and it's wise to be realistic about their reach.

Presenters could consider segmenting their databases to avoid contacting the 'tired of tech' segments with digital offers – such as setting up a specific marketing tag or interest area for digital events.

'Selective but supportive' audiences might respond well to hybrid offerings, which offer the choice between attending in-person or online, depending on which is more suitable in the moment. One said,

> 'In-person will always win, however if restrictions prevent mingling I'd prefer the option of live streaming – especially as it helps to overcome challenges of access, geography and juggling family needs.'

Another said,

> 'I love the streaming option and wish it was a default for most events, but in addition to live attendance.'

Looking forward, offering both physical and digital events (or hybrid models) can help presenters future-proof in the face of uncertain outbreak conditions, giving them a digital format to fall back on in the event of restrictions or cancellations.

Premium offerings at higher price points will appeal to 'digital devotees'

For the committed cohort, quality is key. Don't be afraid to test premium offerings at a higher price point, modelled around a smaller audience. 'Digital devotees' ascribe high value to online participation and many of them are willing to pay, or make a donation for something they experienced.

You might want to target those who experience geographical or access barriers to attending your events in-person. As of March 2021, around 1 in 4 (27%) of audiences are not experiencing any barriers to engaging online. Several people mentioned online programs as imperative for those with access requirements or caring responsibilities. As one said,

> 'Live streaming should be forever included moving forwards because the disabled community has always needed it, and always been denied it. Now we have proof of how easy it is to include us.'

Another said,

> 'Online allows me to bring events to my 94-year-old mother.'

Lack of awareness, time constraints and technical issues are barriers to online participation

In March 2021, audiences were asked if they experience barriers in accessing online programs. The largest proportion of audiences selected that they 'generally don't know what is on offer' (31%, down from 35% in May 2020), followed by 'I have other priorities for my time (28%, down from 34% in May 2020).

Some audiences reported having technical difficulties when accessing digital arts and culture experiences. 1 in 10 say they need help figuring out how to access online programs and 5% say they don't have the right technology. Both of these factors have remained consistent since May 2020 (5% and 10% respectively).

A common theme in comments from survey respondents relates to internet connectivity issues. For example, one person mentioned 'Poor quality of NBN reception.'

Similar comments were made by audience members based in regional and remote areas. For example, one person mentioned, 'Connectivity problems as I live in the country.'

Another explained,

> 'Our internet and phone access are very limited as we are in a remote area.'

Budget for greater digital marketing to increase awareness of what's on offer

Almost a third of audience members are prevented from participating online by not knowing what's on offer. It's important to design and invest in strategies for increasing the discoverability of online offerings.

A strong marketing push to 'digital devotees' and 'selective but supportive' audiences may help digital events stand out and stay front of mind. Audience members are most likely to discover online events from emails from artists or cultural organisations (54% in March 2021) and less likely to actively search the internet for offerings (21%) – suggesting the importance of growing and maintaining email databases.

Audience members also report difficulty keeping track of online offerings. One said,

> 'Sometimes I buy tickets to things or register, then forget when they are, and miss them… It's easy to get caught up in life at home and not make the time to stop and watch.'

Presenters may want to consider sending participants reminders on the day of the event, to ensure that everyone who wants to attend gets the opportunity to do so.

Consider alternative methods of participation for audiences who have other priorities for their time

For the 28% of audience members who don't participate because they have 'other priorities for their time,' presenters should consider taking advantage of the flexibility of the digital medium to increase the availability of their offerings.

When asked in March 2021 which features of digital arts experiences were most appealing, the ability to access something on-demand was the most popular choice for respondents (64%), compared to the 37% of audience members who preferred live streams. Audiences found it easier to find time for experiences that they could access whenever they wanted, and preferred purchase models that offered longer windows to watch content. One said,

> '[Digital events] are sometimes only offered live which are at times not suitable for me. It would be good if they had catch up versions. Have a site that lists all available products.'

Another said,

> '[Some online events'] are on at a time I cannot attend due to work or other commitments. I prefer if they have a long expiry date as sometimes it's hard to find free time when they occur.'

On-demand offerings may also be attractive from a financial perspective – the cost of recording, producing and broadcasting online content is high, and some presenters have suggested they are unlikely to be recouped from a one-off live digital performance.

In the Audience Outlook Monitor's Digital Audience Engagement webinar in May, Stuart Buchanan, Head of Digital Programming at the Sydney Opera House, stated that the Sydney Opera House is disinclined to invest in programs where the presentation window is less than 3 months. Instead, the standard they are asking for when licensing works is a 12-month window.

There is opportunity to offer technical support

With technical difficulties also preventing audiences from engaging with online offerings, there is an opportunity to offer technical support to create smoother online experiences.

Audiences were invited to share suggestions for how to overcome technical barriers. A common suggestion related to offering support to users. For example, some included:

> 'I think I'd need someone to assist me to navigate the online arts program. Or for the distributor to give a step-by-step process.'

Others comments on the value of technical assistance provided by arts organisations, with one suggesting to 'Always provide telephone assistance.'

For those organisations with a mission to serve all parts of the community, digital presentation is now a vital tool and it is wise to develop a sustainable long-term strategy for further work in this area.

What's next

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

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

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

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

Acknowledgment

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