MARCH 2021

Digital engagement

Key findings
Audience Outlook Monitor, Australia

47%
down from 70% in September 2020

are experiencing art and culture online

54%

are relying on email marketing to find content

47%
down from 54% in September 2020

are engaging online more frequently during the pandemic

66%
down from 74% in September 2020

of those engaging more plan to continue, post-pandemic

37%
stable with 39% in September 2020

have paid for an experience online recently

41%
up from 35% in September 2020

of those paying have spent more than $50

27%
up from 22% in May 2020

are not experiencing barriers to engaging online

64%

find it appealing when online experiences are available on-demand

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Summary

Online participation has decreased nationally, and audiences are becoming more selective

In March 2021, just under half of the 13,836 past attendees surveyed said they recently participated in an online arts experience (47%). This is somewhat lower than the previous Audience Outlook Monitor survey in September 2020 (70%), when many venues and events were closed or operating under significant restrictions.

Watching video content of performances and events remains the most popular activity, whether that be pre-recorded video (25%, down from 46%) or live-streamed video (20%, down from 38%). However, participation in online courses has seen the smallest decrease, and now is one of the most popular forms of online engagement among audiences (21%, down from 31%).

Some audiences say they have grown fatigued of 'screen-time' or aren't interested in digital programs (27%, up from 16%). Others are increasingly selective about what they participate in.

1 in 10 (9%) would select a digital program as their first choice for attending a cultural event today – increasing substantially to 58% for audiences who don't foresee going out 'until there is no risk' of contracting or spreading the virus.

Audiences living with a disability are also more likely to be participating online (57%) compared to those without a disability (46%), confirming the role online experiences are playing in widening access to arts and culture.

Audiences paying for content are spending more on average and premium content could have the most enduring market

As audiences return to physical events in greater numbers, there is strong appeal for content that is available on-demand, with 64% ranking this type of access as an appealing feature when accessing online experiences.

More than one-third (37%) of audiences participating online continue to pay for content (compared to 39% in September 2020) and more of those people are spending over $100 (22% of those paying, up from 14%).

However, the types of digital patronage are changing and vary among audience segments. Fewer people are making a donation for something they consumed (13% compared to 20% in September 2020), though this remains a common method for audiences under 35 (17%). Audiences aged 75 and older are most likely to access digital

content as part of a program/season they are subscribed to (15%, compared to 8% generally).

Strategic investment in quality experiences, supported by targeted digital marketing campaigns will help sustain engagement with key segments online and encourage 'discoverability' of arts content.

Introduction

This Fact Sheet outlines key findings about digital audience engagement from the March 2021 phase of the Audience Outlook Monitor in Australia (Phase 4), based on data collected from 13,836 audience members around the country. 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 digital and online engagement.

Participation levels

Around half of all audiences are participating in online arts and culture

Nationally, 47% of audiences said they participated in online arts and culture activities during the fortnight before data collection (3–7 March), decreasing from 70% in September 2020.

Among the audiences participating online, many say they're participating online more frequently than before the pandemic (47%), and two-thirds of this segment plan to continue when it ends (66%). A smaller proportion (22%) say they're participating online less frequently, or are participating more frequently but plan not to continue post-pandemic (34%).

Audiences in metropolitan areas are slightly more likely to be participating online (47%), compared to those in inner regional (44%) or outer regional areas (44%).

Video content remains most popular, but online courses are becoming relatively more common

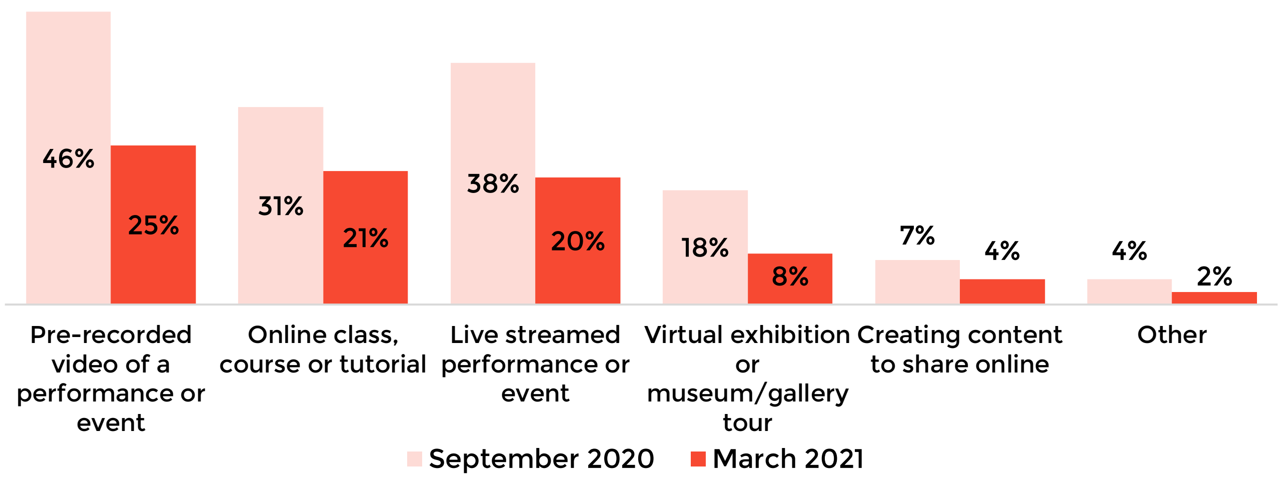
Since September 2020, watching video content of performances and events remains the most common form of digital participation, with 25% of audiences recently watching pre-recorded content and 20% recently watching a live stream (Figure 1).

Fewer people are participating in virtual exhibitions or museum/gallery tours (8%, down from 18%) or creating content to share online (4%, down from 7%).

However, online classes and tutorials are now a comparatively common way that audiences are choosing to participate online (21%). One respondent shared,

> 'I live in a regional city, so online classes have helped me attend things which just aren't on offer here. I hope online classes continue and support is provided to art teachers to have skills and equipment to do this.'

Figure 1: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) September 2020 (n=12,147) and March 2021 (n=13,836)



Interactive experiences appeal more to younger audiences — while older audiences are drawn to video and exhibitions

Audience members under 35 (50%) are just as likely to be participating online as audiences over 75 (50%), however there are some interesting age trends in terms of the types of activities audiences are engaging with.

For instance, audiences under 35 are the most likely to be taking online classes and courses (30% of this age group are participating), compared to those over 65 (19%) and over 75 (15%).

Creating content to share online is also highest among audiences under 35 (12%), compared to audiences aged 35 to 54 (7%), 55 to 64 (3%) and those aged 65 or older (1%). This is possibly due to stronger engagement with social media platforms such as Instagram and TikTok.

Audiences over 75 are most likely to be watching pre-recorded videos of events (31%) and live streams (24%). Consistent with the September 2020 results, this age group remain the most likely to be attending virtual exhibitions (9%) – along with those aged 65 to 74 (9%).

The devices used to 'tune in' to online experiences vary across audience segments

Respondents who had recently watched a live streamed event were asked how they watched the stream – and the results are varied. The laptop (36%) and television (34%) were the most common devices selected, though many audiences are using their desktop computer (32%). Mobile (17%) and tablet (17%) were less commonly selected in comparison.

There are differences in device usage across age groups. Audiences under 35 are the most likely to have used a laptop (58%), while audiences over 75 are the most likely to use a desktop computer (42%) or their television (38%).

Streaming on a mobile device is most common among audiences under 35 (33%) and those aged 35 to 54 (33%), while tablets are most common device among those aged 55 to 64 (19%) and 65 to 74 (19%).

Motivations

Increasingly, audiences are motivated to access things that they can't experience live

When asked about their motivations for participating online, the March 2021 results suggest that the drivers of engagement are changing.

Data collected in the early stages of the pandemic (May 2020) indicated that most audiences were participating in online arts and culture activities for their own mental wellbeing (34%) or to support an artist or organisation they think is important (38%).

Now, the most common reasons for going online are seeing something you wouldn't normally be able to see (40%) and seeing something you had wanted to see live (36%). These two reasons are particularly common motivations for audiences engaging in pay-per-view models (55% and 45% respectively), as well as audiences under 35 (45% and 40% respectively).

Many audiences want to show their support for artists and support their own wellbeing

A significant proportion are still motivated to go online to support an artist or organisation they think is important (30% compared to 38% in May 2020) and this ranked highest among audiences under 35 (37%).

Some people are still participating online for their own wellbeing (20%), particularly audience members aged 35 to 54 (24%). This rate is also higher among audiences who are less engaged with arts and culture events. For instance, 1 in 4 (26%) of those who attend the performing arts only a couple of times per year are motivated by this, compared to 17% of those who attend more than once a week.

Online continues to offer a good alternative where physical attendance is restricted

Qualitative data suggest that some audiences see digital experiences as their preferred option where physical attendance is limited. For instance, one person explained that they have difficulties finding others to go with, commenting,

> '[I] prefer streaming at home than going out, unless I have friends who want to go as well.'

Another shared their sentiments regarding social distancing,

> 'Live performance works best with the sense of a shared audience experience. COVID necessitates some distancing – but at some point, an online interaction becomes more interconnective than a distanced personal one.'

Making content available on-demand is appealing for most audiences – and many want to hear artists talking about their work

Designing digital experiences is complex. While there are audiences for different types of experiences, some features appear more popular than others.

Respondents were provided with a list of seven potential features of digital arts experiences and asked to select the top two most appealing to them.

The ability to access something on-demand was the most popular choice for respondents (64%). This is consistent with previous phases of this study, which found that audiences place a higher value on experiences that they can access any-time, and/or that they have access to for longer periods.

Compared to on-demand offerings, fewer people would want to see something live that is happening right now (37%), however this rated higher among audiences under 35 (44%).

Another popular feature among all audiences was hearing the artist or artistic leader talk about their work (38%). Audiences over 65 (39%) and 75 (40%) are more likely to seek this material, compared to those under 35 (34%). One person shared,

> 'It would be great to have the best of both worlds. I have been attending many more events online, especially if it is talks. Please keep this as an option.'

Some audiences would like access to short, edited segments or 'taster' experiences (15%) or tips on how to improve their own skills or appreciation of an artform (13%) – a feature which the highest rated among audiences under 35 (20%).

Smaller numbers preferred experiences that allowed them to connect with other audience members during the experience (5%) or to contribute to the experience themselves (3%). However, qualitative data shows that chat forums alongside live streams can improve the quality of the experience and create a stronger sense of social connection, which people are craving right now.

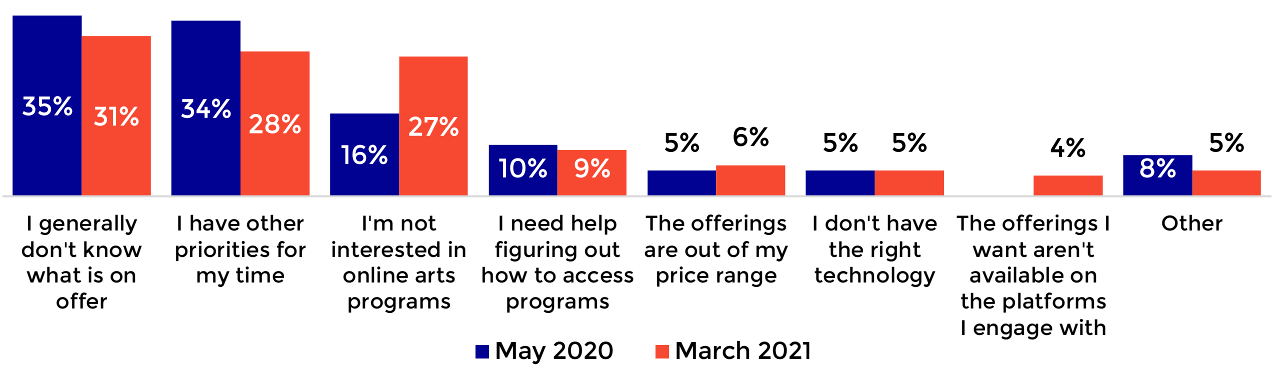
Barriers

Lack of awareness continues to be the top barrier to online participation

All 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%), which remains the top barrier to attendance since the Audience Outlook Monitor first measured barriers in May 2020 (35%) (Figure 2).

The second-most common factor continues to be that they have other priorities for their time (28%, relative to 34% in May 2020). One person shared that they were inhibited by '[not] having the time to know what is available online'.

Figure 2: Which of the following barriers have you experienced in accessing online or digital arts & culture programs? May 2020 (n=7,647) & March 2021 (6,080)



Online continues to be a safe and convenient option for those with a lower risk tolerance and access needs

Around 1 in 10 (9%) audience members would select a digital program as their first choice for attending a cultural event today. This rate increases to 58% for audiences who don't foresee going out 'until there is no risk' of contracting the virus. One person shared,

> 'I actually do not like watch[ing] live-streamed events, but [live attendance] sees inconsistent behaviours, regarding masks, seating capacities etc. It is not an enjoyable experience when 'stress' about the audience is in the forefront of your thinking.'

Others shared that online programs allow them to experience arts and culture with convenience, commenting:

> 'Online saves travel, saves parking hassle, saves having to deal with people I have no interest in speaking with or being near.'

> 'At the moment I get many live-streamed programs and I am quite comfortable with them. I have become reluctant to attend something that is not really necessary.'

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, as one said,

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

Some audiences are tiring of digital experiences and want less 'screen time'

Since May 2020, the proportion of people who say they're 'not interested in online or digital arts experiences' has risen from 16% to 27%.

The qualitative data suggests that as the pandemic wears on, some people are growing fatigued with online participation and are eager to focus on live attendance opportunities. One audience member shared,

> 'I believe there is still a place for live streamed events and hope they can continue for those who are in high-risk categories, but after a year of limited social activities I am keen to attend in person.'

Another commented,

> 'I love live in-person events and online is not quite the same for me. In my job I do too much online and it lacks engagement for me.'

Audiences in metropolitan areas are most likely to select this as a barrier to their online engagement (28%), compared to audiences in outer regional/remote areas (25%).

Some audiences report having technical issues, particularly outside metropolitan areas

Some audiences reported having technical difficulties when accessing digital arts and culture experiences. 5% say they don't have the right technology and 9% say they need help figuring out how to access online programs. Both of these factors have remained consistent since May 2020 (5% and 10% respectively).

The proportion that reports needing help to access online programs is even higher among audiences in outer reginal/remote areas (12% compared to 9% in metropolitan areas).

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

This experience is noted by some audiences 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. Also, I do not get the same level of enjoyment watching something at a distance (i.e., not in person). The atmosphere is completely different.'

There is opportunity to offer technical support and provide alternate methods of participation

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.'

Some people also suggested offering an on-demand alternative to live streamed events. As one regional audience member shared,

> 'They 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.'

Paid experiences

Over one-third (37%) of users continue to pay for digital experiences

While the proportion participating online has fallen, the proportion of online users who are paying for content has remained stable at 37% (compared to 39% in September 2020).

Between the different age groups, younger audiences are more likely to be paying for digital experiences, with 42% of audiences under 35 and 43% of audiences aged 35 to 54 having paid recently.

Paid digital experiences are also more common among frequent performing arts attendees (62%) and frequent museum and gallery attendees (51%).

The types of digital patronage are changing and vary among age groups

The types of payment for digital experiences are changing and vary between audience segments. Fewer people are making a donation for something they consumed (13% down from 20% in September 2020).

Pay-per-view remains the most common form of digital patronage (19%, stable with 21%). A small number (6%) say they subscribed to a platform to access content on-demand, and 8% say they accessed digital content as a part of a program/season they subscribed to. This rate is highest among audiences aged 75 and older (15%) – indicative of member/subscriber audiences more generally.

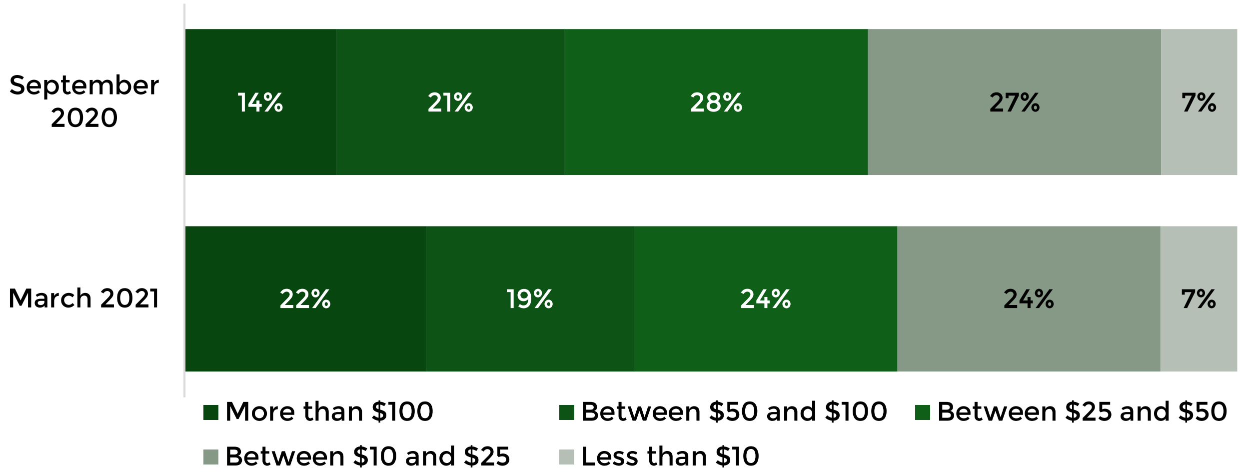
Meanwhile, audiences under 35 are most likely to be making a donation for something they accessed online (17%) and those aged 35 to 54 (12%) are most likely to be subscribing to a platform to access content on-demand.

Digital audiences are spending more on arts and culture experiences

The proportion of paying audiences who are spending large amounts on digital arts and culture experiences has increased, which could suggest that premium experiences could have the most enduring market. 1 in 5 (22%) spent more than $100 in the past fortnight and a further 19% spent between $50 and $100 (compared with 14% and 21% in September, respectively) (Figure 3).

Spending levels are varied according to the frequency of attendance at arts and culture events. For example, online users who attend the performing arts more than once a week are more likely to be spending $100 or more (35%), compared to those who only attend once a month (21%) or less (11%).

Figure 3: Can you share with us your total spending on online arts & culture experiences in the past fortnight? September 2020 (n=2,783) and March 2021 (n=868)



Awareness and marketing

Online users rely heavily on email marketing to find out what's available

When asked about how they found out about their recent online experiences, the largest proportion said they received an email from an artist or cultural organisation (54%). Many others said they were recommended the activity by someone they know personally (34%), or it appeared in their social media 'feed' (32%).

Respondents who recently paid for a digital experience are more likely to rely on email marketing. Specifically, audiences purchasing via pay-per-view experiences (73%), making donations (73%) or subscribing to platforms (63%) are finding out about experiences via email marketing from an artist or cultural organisation more than those who have not paid for any experiences (47%).

Targeted digital campaigns will help to maintain engagement and boost 'discoverability'

Awareness channels vary among age groups. For instance, under 35s are the most likely to know about an online experience through their social media feed (59%), while email marketing is stronger among over 65s (60%) and over 75s (59%).

Evidently, the rate of engagement with different awareness channels increases with the frequency of attendance. For example, online users who attend performing arts more than once a week are more likely to engage with most communications channels than audiences generally, including email marketing (79%), a recommendation from someone (45%) and via a website, forum or newsletter (39%).

This shows the continuing importance of digital marketing campaigns to increase 'discoverability' of arts content and maintain engagement with audiences.

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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