Connecting with audiences online in the time of COVID-19

Fact Sheet

PATTERNMAKERS

About

This document contains a series of facts about connecting with audiences online in 2020, in light of the COVID-19 pandemic. It covers three main topics: reach, engagement and impact.

This Fact Sheet was initially developed for participants in the Patternmakers' webinar 'What audiences want online', delivered as part of the Australia Council's Creative Connections series, but it's available to everyone and you are free to share it.

Before you read on, it's important to acknowledge the complexity of this topic, and that there is no single 'right' way to engage with audiences.

It's also important to acknowledge the challenge facing many creators in the sector right now about how to proceed in this uncertain time. The complexity of this decision almost warrants its own guide!

This fact sheet is designed for those already making work for digital consumption, experimenting with online platforms or who are interested to explore serving their community through the internet during this time.

A valuable first step to connecting with an audience online is being clear on why you're doing it and ensuring your intention is shared among colleagues and collaborators.

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It's now possible to reach 4 billion people online

According to [The Next Web and Global Web Index](#) there are now 4.5 billion people online and 3.8 billion on social media (Figure 1). Our world's population is growing, but the level of penetration of technology is growing even faster, with a 7% increase in internet users since January 2019, and a 9% increase in active social media users over that time.

Their data also shows that we're online for more than a quarter of the day – almost half our waking hours. This amount of internet usage has been going on for years now but what is remarkable is that this is still growing, slowly, but pretty steadily over time.

Figure 1. Digital around the world in 2020

4.54 billion
Internet users (59% of the world's population)

3.80 billion
Active social media users (49% of the population)

6h 43m
Average time internet users spend online per day

9 in 10
Proportion of Australian households with internet at home

Figure 2: [The Next Web / Global Web Index](#)

Not everyone enjoys digital inclusion

According to the [Australian Bureau of Statistics](#) (ABS), the proportion of Australian households with access to the internet at home has been steadily climbing since 2004-05 but remained constant between 2014-15 and 2016-17 at 86%.

The [Economist's Inclusive Internet Index](#) ranks Australia 4th out of 100 countries overall. The breakdown of Australia's score is [here](#).

According to the Australian Digital Inclusion Index (ADII) 2018, Australians are more connected than ever, but the gaps are widening.

Across the nation, digital inclusion follows some clear economic and social contours. In general, Australians with low levels of income, education, and employment are significantly less digitally included – and the gap is widening for some groups like the unemployed.

Indigo Holcombe James, a researcher fellow in the Technology, Communications and Policy Lab at RMIT, says "It's important to remember that [digital] inequity applies to audiences as well as cultural sector practitioners. If we want to ensure that the cultural sector is as inclusive as possible in these strange times, acknowledging digital inequity is a critical first step."

Facebook and YouTube are the largest social networks

According to Statista, the largest social networks are Facebook and YouTube, however instant messaging apps WhatsApp and Facebook Messenger have been growing strongly.

Figure 3 shows the most popular social networks worldwide as of January 2020, ranked by number of active users (in millions).

Figure 3 – Social networks by number of active users (millions), 2020
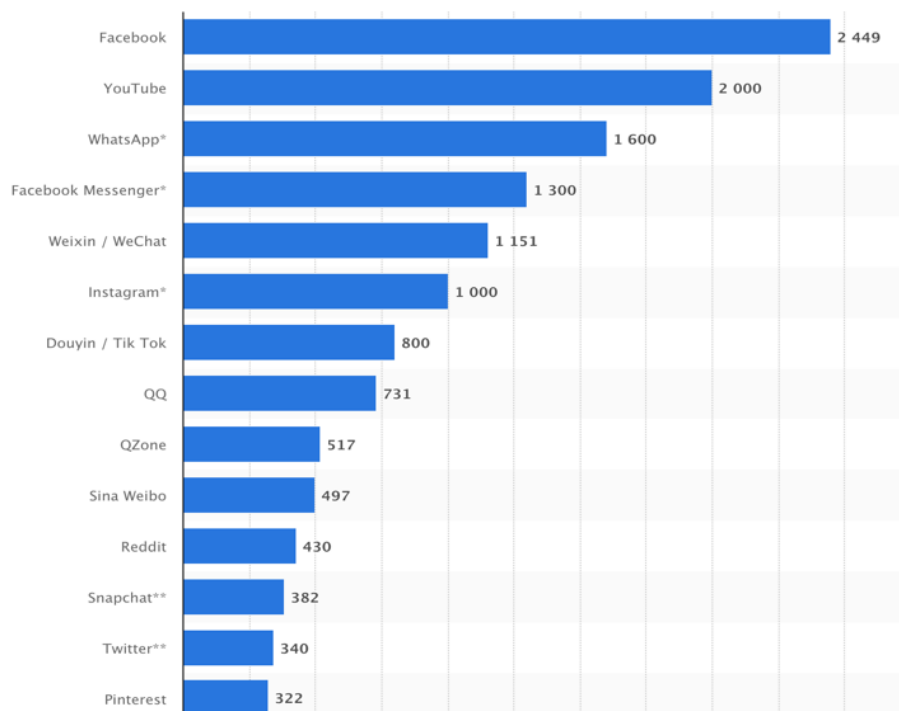
Internet usage is increasingly mobile

Since 2015, mobile's share of time online has grown from 1/3 (33%) to over half (50%), and mobile remains the number one device even during the pandemic.

The New York Times reports that in the past few years, users of services like Facebook, Netflix and YouTube have been increasingly moving to their smartphones, creating an industry-wide focus on mobile. However, now that we are spending our days at home, these sites have all seen user numbers on their phone apps stagnate or fall off as their websites have grown, data from SimilarWeb and Apptopia indicates.

Videos are now 'king' of content

According to The Next Web, nine in 10 internet users are watching videos online (Figure 3), and beyond that, there are signs that video is important to engagement and impact.

Based on analysis of over 700 million Facebook posts, Buffer reports that posts with video are the most engaging – generating 59% more engagement than posts with images or links. They also found that inspirational, funny, or practical content generates the most engagement.

However, it's important to note that maximising the organic reach of content can be challenging – requiring not just quality content, but the right choice of platform (or platforms), satisfying the algorithms and mastering Search Engine Optimisation (SEO). The G2 Learning Hub has some good insights and tips for reaching an audience with video.

We're consuming more since the onset of the pandemic

According to the Global Web Index consumers have been doing more of three key things since the COVID-19 outbreak began; 67% are watching more news coverage, 53% are spending more time socializing as a family, 51% are watching more shows on streaming services like Netflix.

Watching more news coverage tops the charts for each generation, with Gen X leading the way (68%). However, the data tells an interesting story when we look at their second most prominent answer; Gen Z are spending longer on messaging services (62%, Millennials are streaming more films online (58%), Gen X are spending more time with their families (52%) and Baby boomers are watching more broadcast TV (51%).

With the rise of social distancing, we are seeing increases in the use of video chat and we are engaging differently with each type of content, for example, New York Times reports that video games have also been gaining while sports have lost out.

Our attention spans may be shorter online

A recently published study from researchers at the Technical University of Denmark suggests the collective global attention span is narrowing due to the amount of information that is presented to the public. For example, a 2013 Twitter global trend would last for an average of 17.5 hours, contrasted with a 2016 Twitter trend, which would last for only 11.9 hours. Ticket provider Stubhub has undertaken research which shows Brits are now averaging just two minutes 52 seconds before they skip to another song in a bid to keep things interesting during self-isolation.

The Danish researchers say that this trend started over 100 years ago- but social media is now amplifying this trend. In the Guardian, the suggest that distribution of quality, detailed content via social media alone is probably not the best method of distribution.

Platforms influence engagement

The time and place that we encounter content influences how we engage with it, because what we want to achieve when we scroll Instagram stories while commuting is different to what we want to achieve when we turn on Netflix after dinner.

According to one of Facebooks' Product Management Directors, Maria Smith, people's video experiences lie on a spectrum – quick and bite-sized at one end, when they are in discovery mode throughout their day, and deliberate and longer at the other end, when there's time and attention for longer consumption (Figure 4).

Figure 4. Discovery vs. Intent-based viewing (Facebook Business, 2020)
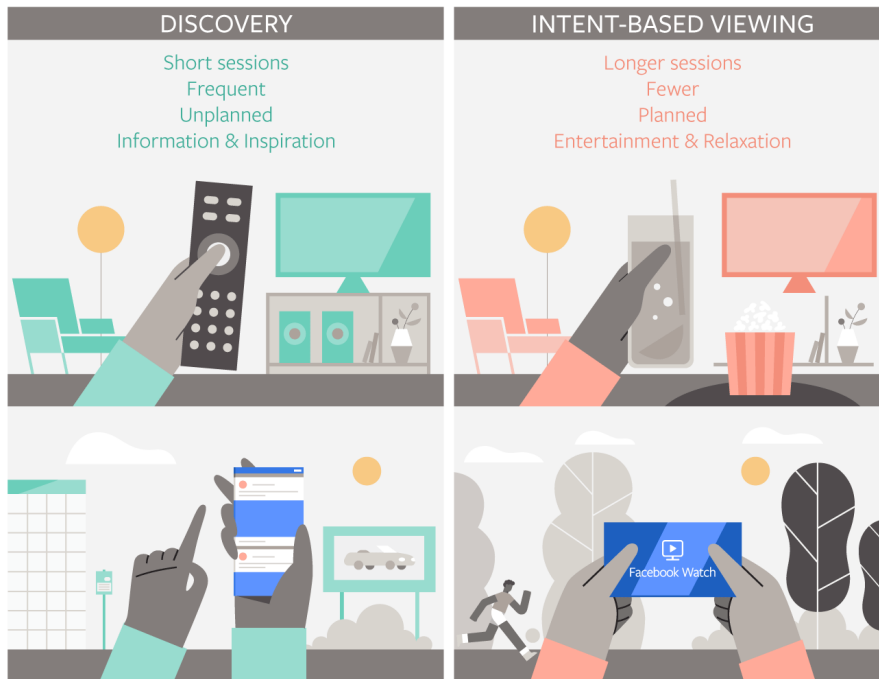
For Millennials, mobile means multi-tasking

Deloitte's Media Consumer Survey found that this year and last year, 91% of respondents multi-tasked while watching TV. Favourite activities include web browsing (26%) emailing (20%) and texting (19%), but TV and social media are the most popular combination, with 27% using social media at least three quarters of the time they're watching TV, and this is even higher for Millennials at 43%.

The 'Social TV' movement, aims to make watching TV a more active content experience for audiences. Most reality TV shows now have some form of social strategy that amplifies the shows' content on social media and takes content off social media and on to the TV screen. Researchers from Indiana University and Emory University in the US shows that marketers have been quick to explore the advertising possibilities of Social TV with advertisers seeing a boost in online shopping when television viewers multitask and engage in social media activity.

Online environments change our behaviour

According to Wikipedia, 'Online disinhibition is the lack of restraint one feels when communicating online in comparison to communicating in-person. Possible influencing factors toward online disinhibition include anonymity, invisibility, asynchronous communication, empathy deficit, in addition to individual factors like personality and culture background.'

It's important to note that online disinhibition can be both positive and negative – positive, in that it enables new levels of expression and communication, allowing people to open up in new ways – which can be incredibly healthy. Negative, in that disinhibition can provide fertile ground for things like social flaming, trolling, cyberbullying and social loafing.

By being aware of online disinhibition, we can be prepared to manage it when it happens.

Understanding context is key to reaching audiences

To summarise the insights about reaching an audience online: the world's online population is potentially at your fingertips, but things are crowded out there. People are busy, distracted, and sometimes behaving in ways they wouldn't behave offline.

All this means that reaching an audience is complex. By looking at trends in usage, devices, platforms and channels, and understanding more about the context of internet users, you can choose to strategise about who you want to reach and how.

Mastering analytics can then help you learn more about your target audience, and evaluate the success of your work online. But that's a story for another fact sheet!

2 Engagement

Sizeable audiences are connecting with live shows

We don't yet know the extent of engagement with culture via live video, at a macro level. One survey by StubHub in the UK showed that 12% already have watched a virtual live performance online and over half (52%) are looking to.

We can, however, see the huge popularity of some live streams, like Andrea Bocelli's Music For Hope Live stream From Duomo di Milano, which has now attracted 39 million views and raised over$250 million euros for the Andrea Bocelli Foundation.

Going beyond views, the National Theatre's broadcast of One Man, Two Guvnors was analysed by Chris Unitt One Further. His analysis found that 120,000 people were ready and waiting for the stream when the 'curtain went up' (Figure 5). The number of viewers peaked at around 216,000 and stayed remarkably consistent throughout the live broadcast. The broadcast attracted a further 2 million views over the week following the live broadcast.

Figure 5. Number of people that watched the live broadcast of One Man, Two Guvnors
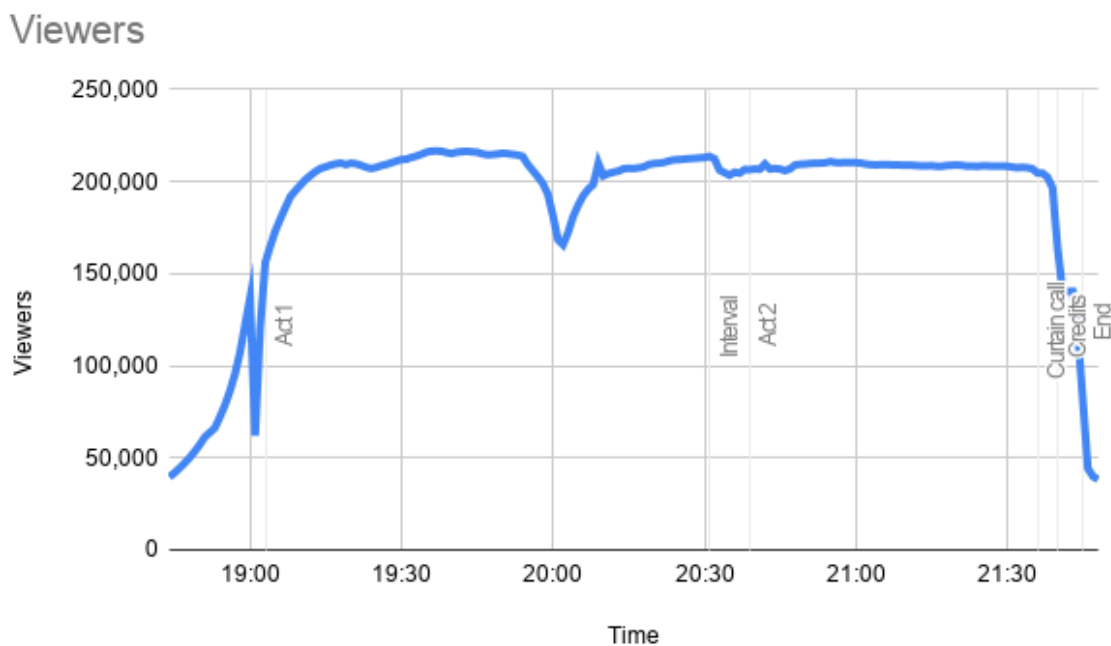
Recorded content is most engaging when it's urgent

Several recent examples confirm that recorded video content can engage very large audiences, suggesting that video does not need to be streamed live to be exciting. However, it helps to employ certain tactics to create a sense of excitement and urgency.

For instance, some creators are achieving that sense of excitement through 'premiering' content on Facebook. The Australian Chamber Orchestra (ACO) are doing this with their ACO Home Casts. One recent home cast performance by the ACO's Principal Violin Satu Vänskä captured over 110,000 views in 4 days.

Other broadcasters are limiting the time streams are available, so they can only be viewed for a certain period. For example, it was announced that from 7pm on 17 April 2020 a broadcast of the Phantom of the Opera Full Stage Show would be available for only 24 hours in the UK and 48 hours internationally. This broadcast attracted 8.5 million views, raising funds for the NHS Charities COVID19 Appeal.

People are contributing content to show their creativity

Another trend in engagement with cultural content relates to institutions creating user-generated content challenges, such as recreating famous artworks on Instagram. Led by the Getty Museum, #betweenartandquarantine has attracted 18,600 posts on Instagram alone.

In the performing arts world, Pub Choir's Couch Choir collaborative performance of (They long to be) Close to you has attracted 642,000 views.

Those artists and organisations with deep online collections, strong online communities and/or existing digital capacity have been quickest to grow their audiences during this time, but there are endless opportunities to engage audiences in this way.

People want to make things themselves

Search interest in 'do it yourself' videos has spiked globally in the past few months and while some of this is about making your own hand sanitizer or protective equipment, there's also a rise in topics like 'sprucing up your patio' or 'building your own greenhouse'.

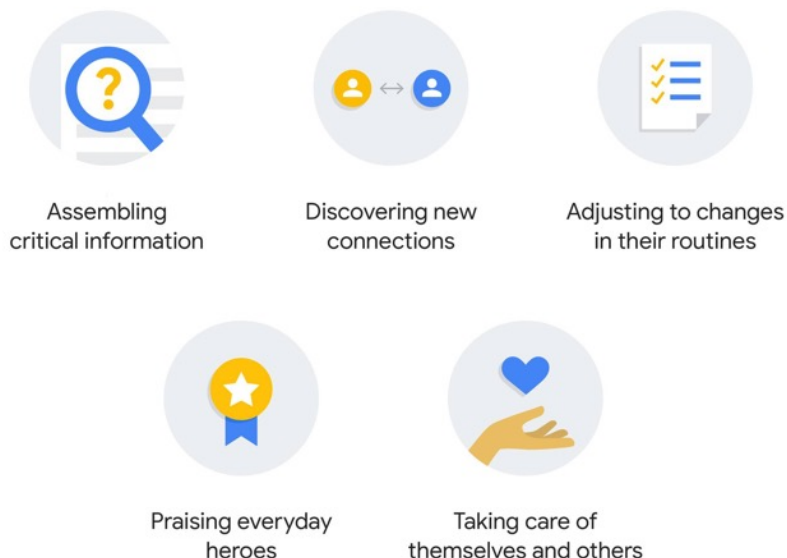Since people began self-isolating, YouTube has identified a huge rise in uploads of 'Day in the Life' videos.

Another interesting trend identified by YouTube is a rise of 'with me' videos. When they first emerged – as 'get ready with me' make up tutorials, they represented a new kind of content, where the mundane, often isolating experiences of people's daily lives, suddenly become informational, inspirational, and most surprisingly, communal. 'With me' videos, which now include 'draw with me' and 'paint with me' have attracted 4 billion views.

For those interested in ideas around video content, YouTube's Culture & Trends site identifies what is engaging audiences across all different genres. Vimeo, too, reports on trends, like interactive storytelling, and video technologies like volumetric video, 3D capturing, gaming and film and AI-generated characters and plots.

People want to pass time and socialise in novel ways

As boredom and anxiety set in, people are looking for ways to pass time and socialise in novel ways. Think with Google has been looking at search trends since the pandemic began and discusses how brands can help. They identify five key needs in how people are searching (Figure 6).

Figure 6 - 5 behaviours reflected in how people are searching (Google, 2020)

Assembling critical information

Discovering new connections

Adjusting to changes in their routines

Praising everyday heroes

Taking care of themselves and others

In terms of types of content, Google has seen rising search interest in 'puzzles' in the U.S., Australia, and Canada especially. Search interest for multiplayer video games has also spiked globally in the past few months, especially in Italy and Canada.

Over one in ten (12%) Brits have already held virtual listening parties with their nearest and dearest, while a further 35% are planning to follow suit. Search interest for 'virtual happy hour' is rising, especially in the U.S [9] and between the hours of 11 p.m. and 3 a.m. in the U.S., search interest has been peaking for 'relaxation,' perhaps as people need help falling asleep.

3   Impact

Technology is more impactful when it is social

Research on children's media usage shows that children learn more from content when parents or early educators watch and interact with children, encouraging them to make real-world connections to what they are viewing both while they are viewing and afterward.

The Office of Educational Technology in the USA outlines types of guidance that can increase active use of more passive technology (Figure 7). These include:

- o Prior to viewing content, suggesting certain elements to watch for or pay particular attention to
- o View the content together and interacting in the moment;
- o After viewing the content, engaging in an activity that extends learning such as reperforming something, or connecting the content to the world.

Figure 7. How technology is more effective when used together

Engage   Communicate   Learn   Create

Figure 6: https://tech.ed.gov/earlylearning/principles/

Ambitious digital projects can fall short of targets

Can a virtual offering enable cultural institutions to reach more people, earn revenue and deliver more impact through their work? Yes, but many find it challenging.

An [evaluation of the Digital R&D Fund for the Arts](#), a £7 million technology innovation program for arts and culture organisations has some sobering findings. It found that among the 52 cultural institutions funded to develop new digital engagement products:

- 73% thought their project would help them engage more extensively with their existing audience; only 33% reported a major positive impact in this area
- 68% thought that they would be able to reach a bigger audience but only 33% reported this effect
- 54% thought their project would help them reach a more diverse audience, only 24% reported this as an impact.
- 45% thought they would achieve greater reach to international audiences, only 19% saw this as a major impact.

Audience members may be using this time to sample new things

In 2020, Patternmakers is working with WolfBrown on an international tracking study of audience attitudes and behaviours. In the coming months, we'll have more data to share on digital engagement, and

Our early qualitative research with audiences suggests that people are using this time to sample arts and culture they are curious about. People report that they are stumbling on things online and being exposed to a lot more than they normally would be.

One person described to us how they've been curious about seeing a Bangarra performance for years, and the recent live stream was a chance to finally see what it was about. She said enjoyed viewing it on her Smart TV, in her living room, while chatting on WhatsApp to two friends.

She said having the chat turned on made her feel connected to a global audience of around 3,000 people, and it was nice to be able to fix her own drink during the show. She said it made it more likely for her to buy a ticket to a live show.

There has never been a better time to engage online

To summarise the take-aways from this section on impact: Audience development online, as it is offline, is hard, and it's important to set realistic expectations internally and with

stakeholders before embarking on a digital project. The principles and processes from the technology world like Lean Start-up can be really helpful.

Although it's wise to be realistic, it is a great time to be experimenting with online distribution. As stated above, there are more people online, spending more time online, engaging with more content online than ever before.

Further, as a result of the pandemic, people may be feeling lonely, bored, isolated, sad, anxious, and are potentially ill or looking after someone who is ill. So, it is not just a good time, but an important time, for artists and cultural organisations to engage online.

For more information

For more resources on online engagement, please visit our website.

Watch a short video, in which six digital professionals share their insights about audience engagement online.

Patternmakers' Managing Director Tandi Palmer Williams is happy to take questions and connect via LinkedIn, Twitter, Instagram, or via Patternmakers Facebook page.

To stay in the loop with new research and resources generally, subscribe to Patternmakers' semi regular Culture Insight & Innovation Updates.

You can listen to the first five episodes of the Theory of Creativity Podcast now, and look out for Episode 6 on digital storytelling metrics and measurements.

About Patternmakers

Patternmakers is a research agency specialising in culture, creativity and community. We believe in the power of insight to help good causes create a better world.

Patternmakers acknowledge the traditional owners of the land and the contribution of the Aboriginal and Torres Strait Islander peoples of Australia past, present and future.

For any questions, please contact info@thepatternmakers.com.au.