



PATTERNMAKERS



Audience Outlook Monitor

The time is now: Young audiences 2022

National Fact Sheet



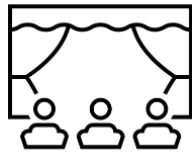
Key facts

Attendance outlook for young people



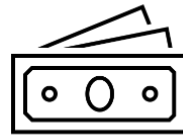
743

Young people responded to the March 2022 survey, including Millennials and Gen Z



9 in 10

Under 25s attended an in-person event recently, compared to 70% generally



34%

of young people report financial barriers to attending, compared to 17% generally



58%

of under 25s are attracted to 'light-hearted' programming, compared to 40% of audiences generally

Opportunities



tweak messaging to highlight the opportunity to reconnect with others



prioritise affordable participation through discounts, offers and rush tickets



platform young voices to ensure arts offerings speak to their experience and issues close to them



explore innovative models for interactive participation — both on- and off-line

Key findings

9 in 10 young people are attending cultural events and many are eager to support the arts

- ▶ The latest data shows that young audiences are the most active of any age group, with 9 in 10 (88%) audiences under 25 attending in-person cultural activities recently.
- ▶ Young people are participating in most activities more than older audiences — particularly live performance (53% of those aged 16-24, compared to 46% generally).
- ▶ Two-thirds of young people aged 16-24 (64%) and 25-34 (63%) say they are 'ready to attend whenever permitted' — rates that are slightly higher than audiences generally (59%).
- ▶ Comments from young audiences reveal that two years of missed opportunities has heightened their appreciation for the arts and many are eager to support artists and cultural organisations in the recovery from the pandemic.
- ▶ Most young people are satisfied overall with COVID-safety at recent events they attended (78%) and COVID-safety measures are generally less polarising among young people.
- ▶ Some will continue rely on COVID-safety as attendance rates increase. Commentary from young people suggests that concerns remain around transmitting the virus to those at-risk — particularly for the 30% of audiences under 25 having someone in their household who is vulnerable to COVID-19.

Young people are generally optimistic, but 1 in 3 are inhibited by financial barriers

- ▶ The data shows that young audiences are feeling optimistic about attending events in 2022 and beyond: 93% of those under 25 and 84% of those aged 25-34 are making firm plans to attend a cultural event (compared to 79% generally).
- ▶ The majority of young people are confident that the vaccination effort will allow normal activities to resume within a year, particularly those under 25 (97%) — and this rate being even higher than average (91%) demonstrates their positive outlook.
- ▶ Young people are even more inclined to last-minute decision-making, with 4 in 10 of those making plans, booking events in the next seven days.
- ▶ While most are eager and making firm plans to attend events, audiences under 25 are the most likely to report financial barriers (34%, compared to 17% generally) as inhibiting their attendance.
- ▶ While spending levels on cultural events are generally increasing, young people continue to spend less than older audiences: 24% of those under 25 spent \$100, compared to 38% of audiences generally.
- ▶ The rising cost of living is not lost on young audiences, and in sharing suggestions for how cultural organisations can better connect with their age group, these considerations were most commonly mentioned.
- ▶ Offering student discounts, group deals and rush tickets were often suggested to assist young people to access cultural experiences without compromising smaller budgets.

The arts are a lifeline and offer a renewed sense of normalcy and connection for young people

- ▶ Looking ahead, the majority of young people are interested in attending the same kinds of events/venues they attended pre-pandemic (93% of under 25s and 87% of those aged 25-34) — similar to the national average (90%).
- ▶ However, young people are even more attracted to ‘light-hearted’ programming (58%), compared to audiences generally (40%), with many reporting they’ll be seeking escapism, joy, healing and connection through their experiences.
- ▶ Audiences aged 16-24 (16%) and 25-34 (15%) are also more likely to be seeking works that ‘make sense of the pandemic’ (compared to audiences generally (10%), suggesting a greater inclination among young audiences to create meaning about the world around them.
- ▶ Recent data from [Mission Australia](#) reveals that the area of young people’s lives most negatively impacted by COVID-19 is ‘participation in activities’ (68%), and the impacts of isolation and cancelled social activities on mental health are prevalent in audience feedback.
- ▶ Many young people are conscious of the need to reconnect and return to a sense of ‘normalcy’ — with arts experiences providing a unique opportunity to do so.
- ▶ There is potential for cultural organisations to improve their marketing and communications for Millennial and Gen Z audiences, as one of the keys to encourage attendance and provide the benefits of being included in arts experiences.

Introduction

This report shares insights from over 700 attendees aged 16-35

Launched in May 2020, the Audience Outlook Monitor is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving around 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 9 March 2022, participating organisations simultaneously sent the Phase 7 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

This report compares the new results with data collected previously in March 2021 (Phase 4), July 2021 (Phase 5) and November 2021 (Phase 6), to examine how things are changing over time.

In addition to this Fact Sheet, the March 2022 results are accessible in a free interactive dashboard. Users can explore the data for 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.

About the sample

The sample used for this fact sheet is defined by recent attendees of arts and cultural events, who self-identified as being between the ages of 16-24 and 25-34 in the March 2022 survey.

At times, these audiences have been grouped together and referred to as 'young people' or 'young audiences' and compared to older audiences or the national average, where relevant.

Read on for the latest findings about young people, as well as Key Takeaways for Engaging Young Audiences.

Live attendance

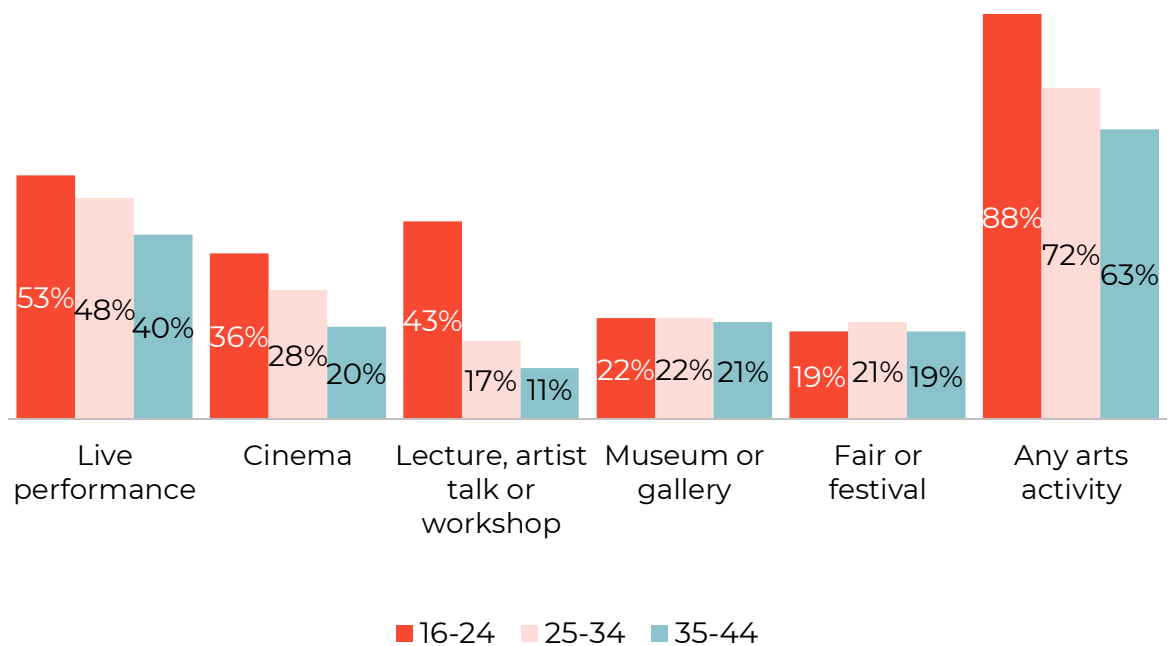
Young people are the most likely age group to be attending events currently

The latest data collected in March 2022 shows that young audiences — particularly those aged under 25 — are the most eager and active of any audience age group.

9 in 10 (88%) audiences under 25 attended an in-person arts or cultural event in the fortnight before data collection (9-13 March 2022), higher than the national average of 70%.

Audiences aged 25-34 are slightly less likely to be participating in arts activities in comparison (72%), and those aged 35-44 even less so (63%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? Audiences aged 16-24 (n=167), 25-34 (n=576) and 35-54 (n=914)



Most young people are ‘ready to attend’ cultural events after two years of missed opportunities

Young audiences are demonstrating the most confidence in terms of attending cultural events: two-thirds (64%) of those under 25 and two-thirds of those aged 25-34 (63%) say they are ‘ready to attend whenever permitted’ — a slightly higher proportion compared to 59% of audiences generally.

This sense of readiness has translated into booking events, with 9 in 10 (93%) audiences under 25 making firm plans to attend cultural events in future, compared to 79% of audiences generally.

One audience member under 25 shared,

‘Though COVID is definitely still rampant in our community, I am triple vaccinated and find I’m still taking the necessary precautions when leaving the house and attending events. [So] the overarching fear of COVID is less present in my day to day. I’ve accepted it as a reality and take every precaution to remain safe, but still ensure I can live my life.’

[Mission Australia’s 2021 Youth Survey Report](#) reveals that the area of young people’s life most negatively impacted by COVID-19 is ‘participation in activities’ (68%).

Through the Youth Survey and other research, Mission Australia reports that,

‘Young people in Australia and internationally have described how restrictions on movement and activities to stop the spread of COVID-19 have limited their opportunities for social interaction, increased their feelings of isolation and negatively affected their health and wellbeing.’

Comments from young people responding to the Audience Outlook Monitor show that many are ready to re-attend events after two years of missed opportunities. One person shared,

‘I’ve had COVID so I’m feeling more confident in my immunity alongside my 3 vaccines! Ready to live life!! I’m 20 and I feel like I’ve missed out on so much, so I’m ready to go.’

Young audiences are eager to find ways to support artists and cultural organisations

Comments from young audiences show that they are eager to support artists as best they can. One shared,

‘I am okay with catching COVID. I feel as though our generation has missed out on so much that it’s a risk I’m willing to take. I want to also support the arts over restaurants or sports, due to their hardship during COVID.’

Another said,

‘I believe it is better to put these shows on after a stressful year and manage the COVID spread accordingly. We can’t wait until it is gone completely as artists are already trying to recover from 2yrs of not knowing when the next gig could be.’

Audiences under 25 are the most likely of any group to have contracted COVID in the past (27%, compared to 10% of audiences generally) — and this may be stimulating higher attendance rates. As one person shared,

‘I believe that we have done as much as we can to be safe, and we need to start supporting the arts again. I am young, fully vaccinated, and have had COVID, and I want to do what I can to help support the regrowth of the arts.’

Comfort and COVID-safety

Young people are significantly more comfortable in cultural venues than older audiences

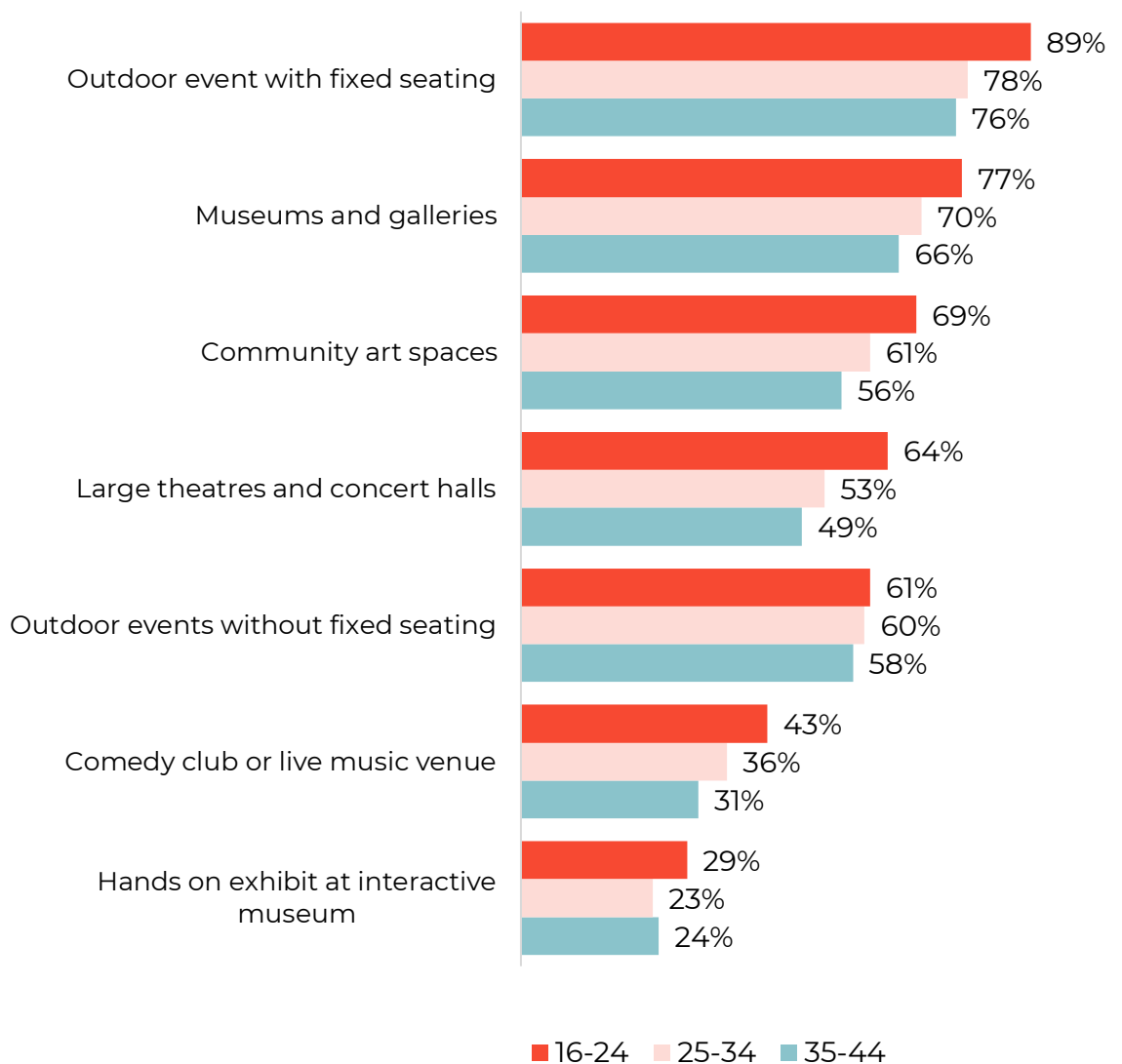
Consistent with general attitudes among survey respondents, cultural venues are generally seen as safer to young people than other public spaces.

Young people under 25 are the most likely to feel comfortable participating in public activities overall, such as flying domestically (38% ‘very comfortable’, compared to 31% of audiences generally), using

public transport (41%, compared to 36%) and exercising at a gym (47%, compared to 32%).

They are also more comfortable in all cultural venues and events — such as large theatres and concert halls (64% ‘very comfortable’, compared to 49% generally), museums and galleries (77%, compared to 66% generally) and community art spaces (69%, compared to 54% generally) as shown in Figure 2.

Figure 2: Proportion of audiences ‘very comfortable’ attending cultural venues. Audiences aged 16-24 (n=167), 25-34 (n=574) and 35-44 (n=914)



8 in 10 are satisfied with COVID-safety at cultural venues — and the presence of safety measures are less polarising among young people

When it comes to COVID-safety measures, similar to audiences generally, proof of vaccination is the most encouraging safety measure to young people. 8 in 10 (76%) audience members under 25 say they find this measure encouraging, compared to 70% of audiences aged 25-34 and 71% of audiences generally.

Audiences under 25 are also much more encouraged by the option of Rapid Antigen Testing (RAT) (61% encouraged), compared to 43% of those aged 25-34 and 46% of audiences generally.

Among audiences under 25, overall satisfaction with COVID-safety at arts events is high, as it is in other age groups (78% compared to 79% generally).

Young people are happy to follow COVID-19 guidelines, even though they are less concerned about the risks for themselves

Comments from young people indicate that many are generally happy to comply with safety measures — provided it allows them to experience arts and culture in person (Figure 3).

For instance, just 16% of those under 25 are discouraged by mask-wearing requirements for audiences aged 12+, compared to 24% of audiences aged 45-54.

One young person shared,

‘After two years of no arts/cultural events, I am keen. I am triple vaccinated, happy to wear masks everywhere.’

Another said,

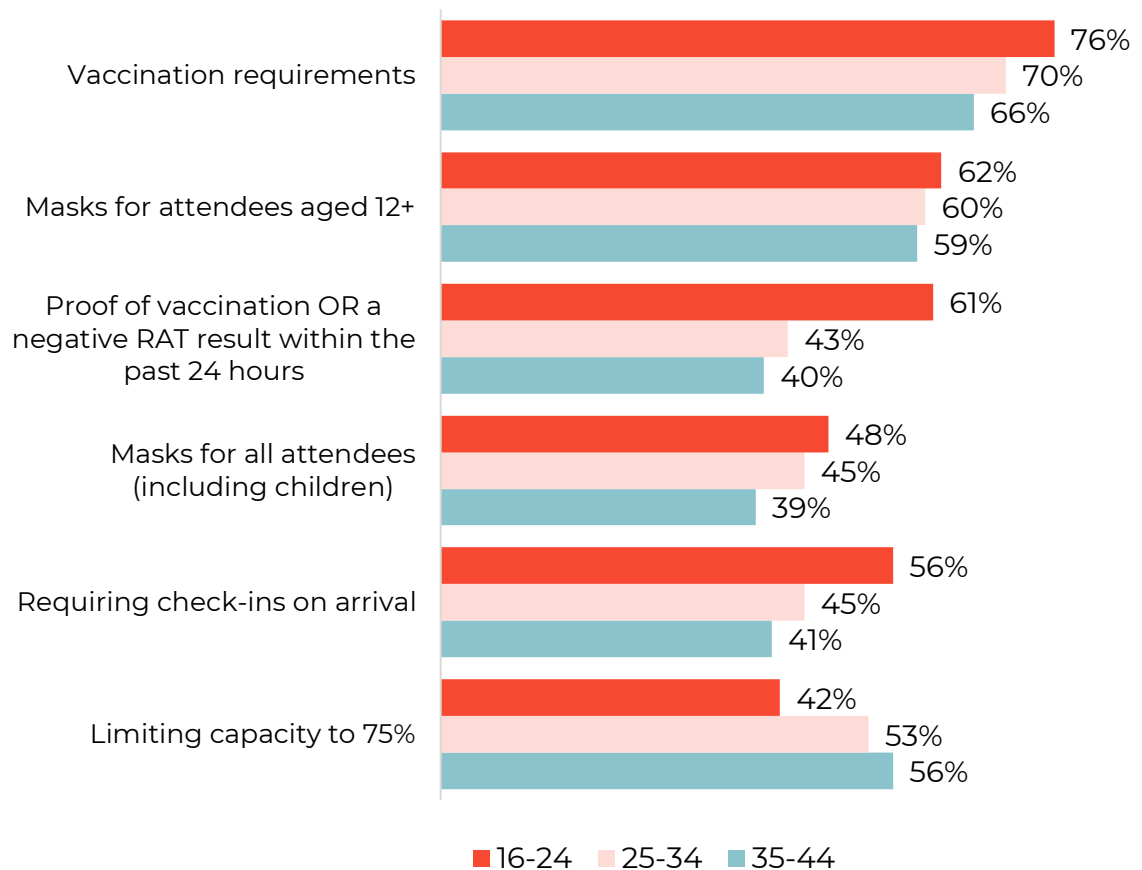
‘It has taken a while to feel comfortable within many settings but I do feel now that most places have continued to apply distancing and mask wearing when necessary.’

While young people are generally less concerned with the risks for themselves, one-third (30%) of those under 25 said they live with someone vulnerable (compared to 15% of audiences generally) and one-third (30%) are connected to someone vulnerable in their extended/family network (compared to 25% of audiences generally).

Comments from young people reveal that many will continue taking necessary precautions when considering attending cultural events. One person shared,

‘I live with an immunocompromised person. I am endeavouring to attend an absolute minimal amount of public/social events until I can be certain they will be safe and I will not bring COVID home and infect them.’

Figure 3: Proportion of audiences encouraged by COVID-safety measures at arts events. Audiences aged 16-24 (n=167), 25-34 (n=574) and 35-44 (n=903)



Barriers to attendance

Young people are more likely to be limited by a lack of supply of events, than other adults

When it comes to factors that are preventing young people from attending cultural events, the most significant barriers for those under 25 are the risk of contracting COVID (56%) and being a close contact (44%) — consistent with audiences aged 25-34 and the national average.

However, there are some important differences. Audiences under 25 are indicating they experience some other types of barriers in larger proportions relative to older audiences. For instance, they are more likely to say the risk of future lockdowns and cancellations is inhibiting them (43%), compared to audiences generally (32%). This is consistent with audiences aged 25-34 (43%).

The perception that there are not as many options available (20%, compared to 11% audiences generally) and that events are booking out too quickly (14%, compared to 9%) is also more prevalent among audiences under 25.

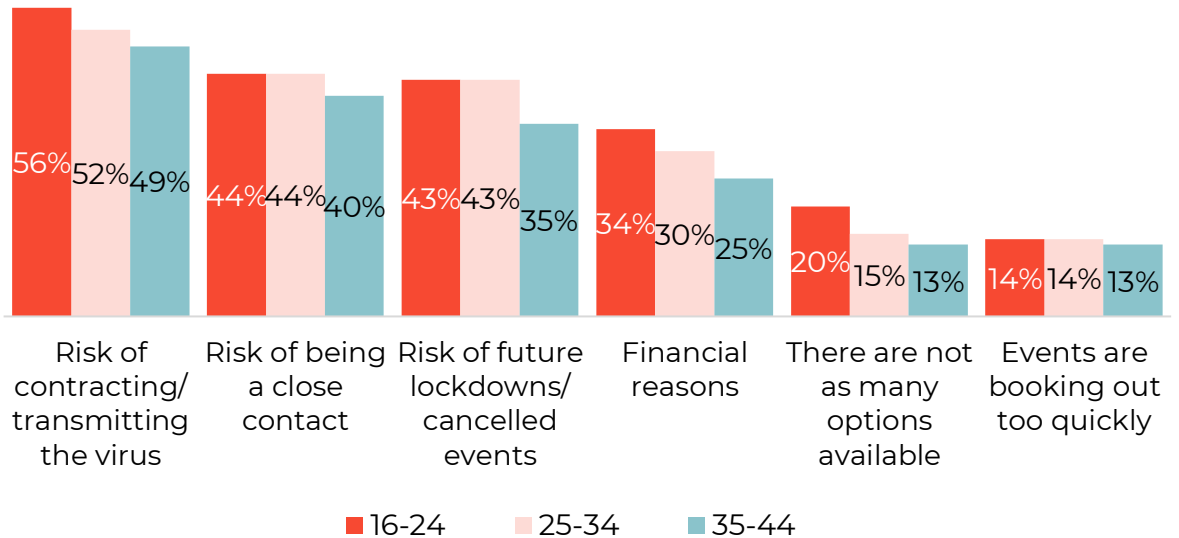
Financial barriers are twice as prevalent among young audiences, compared to older audiences

While they are eager and ready to attend, audiences under 25 are twice as likely to say financial reasons are a barrier to attendance (34%) compared to audiences in general (17%). Among audiences aged 25-34, 30% are citing financial barriers. (Figure 4).

The cost of living is a key concern for young audiences, and findings from Mission Australia's 2021 Report reveal that young people responding to the Youth Survey identified that COVID had negatively impacted their [employment \(30%\), financial security \(24%\) and housing \(7%\)](#).

Affordability of arts experiences will be a key consideration for cultural organisations in their engagement strategies for young audiences, as they navigate the economic impacts of the pandemic.

Figure 4: Proportion of audiences who say these factors will preventing them from attending in-person arts and culture events as they used to in the past. Audiences aged 16-24 (n=167), 25-34 (n=571) and 35-44 (n=912)



Young people are spending less on cultural activities, and are conscious of the rising costs of living

In fact, the data shows that young people are spending less on tickets to in-person cultural activities: one-quarter (24%) of those under 25 spent more than \$100 in the fortnight before data collection, compared to 38% on average. Among audiences aged 25-34, 31% spent \$100 or more. One young person shared,

‘One of the biggest barriers of engaging with the arts for my generation is affordability — art is an indulgence many can't justify. Most of my friends entirely appreciate the cost of making art and don't begrudge the price, but it makes regular engagement a balancing act.’

For many young people, affording to attend arts and cultural events is a balance, and is linked with the rising cost of living. One said,

‘Secure well-paid work is hard to find and I will not be able to afford to go to shows, especially when I work casually and committing to a show means I risk losing income if work is offered that day.’

Another said,

'Many people my age are unfortunately busy with work or study, and/or do not have a lot of disposable income to justify attending more expensive events.'

Prioritising affordable options will be important for engaging young people inhibited by financial barriers

With financial constraints even more prevalent among young audiences and older audiences, many respondents suggested ways that arts organisations can help to overcome these barriers and encourage attendance.

Many young audience members are relying on discounted tickets, as one said, 'I only currently get to go to shows because I buy restricted view or under 30s tickets. But I will soon be too old for under 30s tickets.'

Some suggested offering packages, group deals and student discounts. One respondent suggested,

'Making theatre more accessible! And art generally but theatre especially tends to be very expensive. Shows that have much cheaper student tickets or under 30 tickets do well in reaching my age bracket.'

Another suggested,

'Make it affordable and accessible. Offer +1 tickets for free to encourage people who like to attend to invite their friends. Make smaller gigs (think Australian String Quartet Close Quarters).'

One said,

'Cheaper prices, cause most of us are broke uni students. Even just doing ticket lotteries helps with cheaper prices.'

Others suggested programming smaller, financially accessible options for events. One said,

‘Performing in different venues i.e. rather than performing in large theatres consider doing smaller and more casual performances.’

Flexible ticket options could encourage ‘last-minute’ bookers to attend events

Compared to older audiences, young people are showing a tendency towards last-minute decision-making, with 4 in 10 audience members 16-24 (40%) and 25-34 (38%) booking events in the next seven days, compared to 29% on average.

For some, rush tickets are an affordable option that can encourage more young people to attend. One said,

‘Rush tickets are a great way to get people who suddenly are free one night and are willing to have a crap seat but for \$40.’

Others advocate for refund policies and communicating them properly. One said,

‘Accessible ticket prices and refunds if I happen to contract COVID or have to isolate. I have lost a lot of money due to non-refundable tickets.’

Taste and preferences

Young people have an appetite for a wide range of experiences — and are passionate about connecting locally

When asked about the location of events they are making plans to attend, the majority of young people are booking locally — represented by 76% of audiences under 25 and 79% of those aged 25-34. These proportions are higher than the national average (70%).

This may be linked with financial barriers, and the ability to travel while employed and/or attending university or college — or reflect the fact that young people are keen to attend cultural events and local options are the most accessible to them currently.

One said,

‘I want to support local, smaller venues as well as the main ones. I would be more willing to spend less money on less heard of shows, any excuse to get out and socialise.’

In terms of the types of content they’ll be attracted to, audiences under 25 (58%) and aged 25-34 (51%) are the most interested in light-hearted programming of any age group, compared to a national average of 40%.

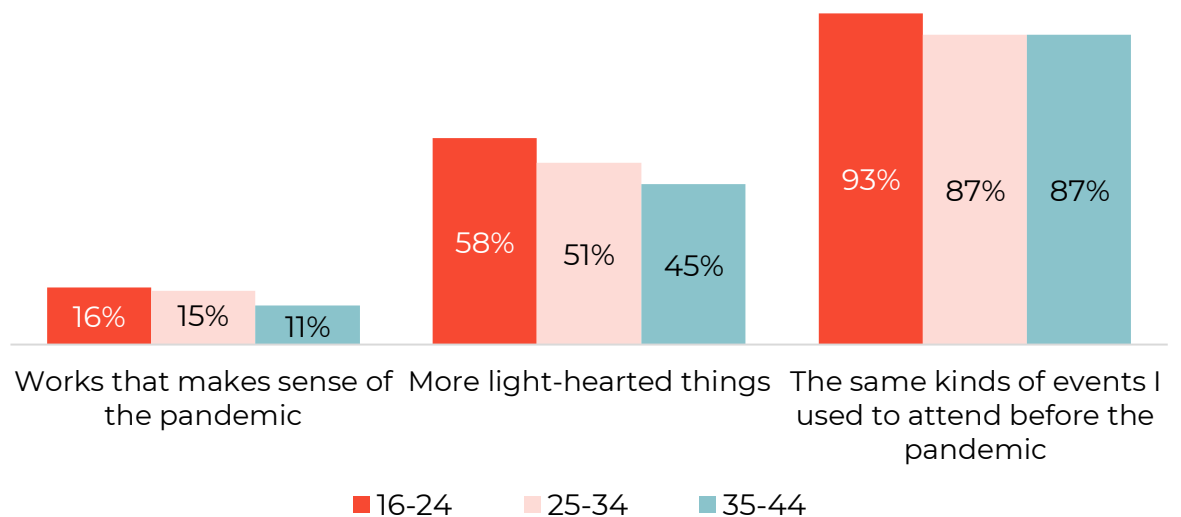
When asked how the arts can support in the recovery from the pandemic, one young person commented,

‘More comedy events, to lift people's spirits after COVID, and especially out of the depression that many Australians now suffer with as a result.’

Another said,

‘Give a sense of community and normalcy. A distraction from the world events is good.’

Figure 5: In the next 12 months, assuming events/venues are open, I’ll be most attracted to...Audiences aged 16-24 (n=165), 25-34 (n=573) and 35-44 (n=904)



Young people are also more likely to seek thought-provoking, highly contemporary work that relates to their perspective

While in the minority, young people are also more likely to be attracted to work that makes sense of the pandemic: representing 16% of those under 25 and 16% of those aged 25-34. This compares to just 10% of audiences generally.

One young person shared,

'I think [the arts] are a great medium to communicate residue feelings or consequences of the pandemic on our daily lives and make people feel less alone in this shared experience.'

Another said,

'I want community arts and cultural events to discuss the pandemic and what we have all gone through. It is the most connected we have ever been with an issue, but I feel like too many people are scared to mention it. Maybe it is just for now because it is so fresh.'

For some, thought-provoking content is most successful through a lens of humour and relatability. One said,

'Anything political satire is interesting, though it's best done without becoming too "real". Less 'Don't look up', and more 'Utopia'. We're looking to move on from the pandemic, not get stuck thinking about it in performance pieces. Performance art should provide an opportunity to escape.'

Another said,

'Make their work relatable to an everyday audience, thought-provoking, easy to access, and in line with contemporary political considerations.'

Young people want to see the arts reflect the issues and topics that are important and relevant to them

Many young people shared suggestions for how the arts can better connect with them by reflecting the needs, interests and issues that are relevant to their lives. One said,

‘Expand the variety of events available to meet the interests of our generation. Maybe collaborative arts and cultural events pertaining to interests relevant to our generation.’

Another mentioned ‘More contemporary pieces, building off of issues facing this generation and unique time.’

For some, perceptions of arts experiences as exclusionary can be addressed through improved messaging. One shared,

‘Better marketing. I love going to the theatre but I think a lot of people my age see it as something for “old white people”. I think if better marketing/advertising was in place (although I get that that's expensive), more young people would show up.’

Online participation

Two-thirds of audiences under 25 are participating in online arts and culture — particularly interactive formats

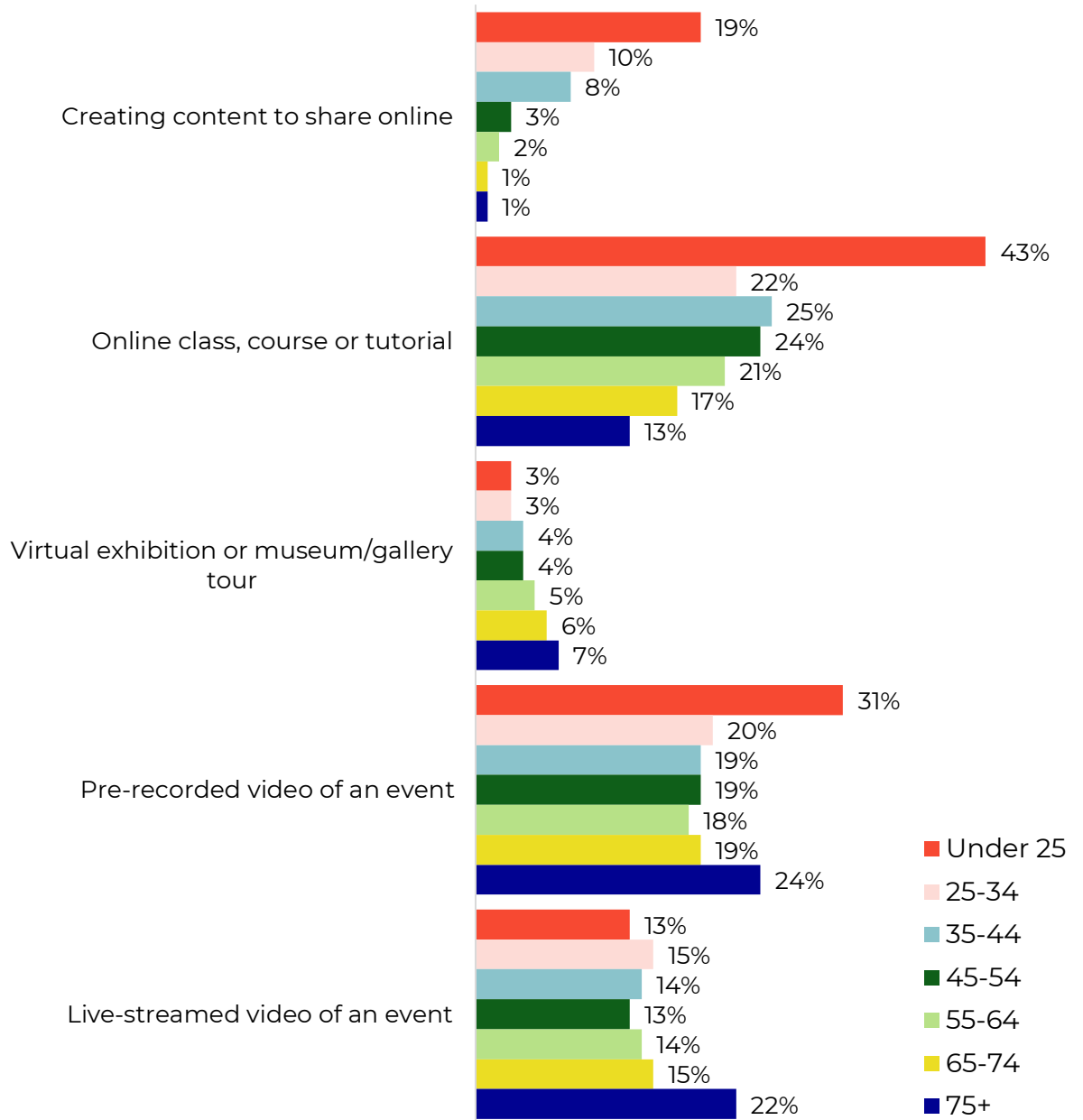
Audiences under 25 are the most likely to be engaging in online arts and culture activities (63%) of any age group — compared to a national average of 41%. Among audiences aged 25-34, 45% are participating in online arts and culture.

In comparison, audiences aged 65-74 are the least likely (40%) to be participating online.

Audiences under 25 are engaging in most online activities in larger proportions than other age groups — particularly formats that are interactive or enable active participation, such as creating content to share online (19%) and participating in online classes, courses or tutorials (43%).

Meanwhile, older audiences are more likely to be engaging in live-streamed video and virtual museum and gallery tours — as shown in Figure 6.

Figure 6: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). By age group (n=8,384).



1 in 3 (36%) audiences under 25 who are participating, are paying for digital experiences. The most common form of payment is subscribing to a platform for on-demand content (15%) — meanwhile all other age groups are more likely to be purchasing single experiences.

In line with spending trends generally, young people who are paying for online arts experiences are spending less: the majority of those under 25 (73%) and aged 25-34 (75%) spent less than \$50 in the past fortnight — while audiences aged 55 and over are spending the most.

Three-quarters of young people say digital will play some role in their lives outside of lockdowns and cancelled events

Young people are more likely to say digital will play some role in their lives (78%) — either a small role (55%) or substantial role (23%). This is a larger proportion than average (73%).

Several respondents acknowledged the importance of digital options in overcoming barriers to participation — particularly for those who are more vulnerable to health risks, or with limited access to in-person events. One said,

‘Online events are incredibly good and quite frankly what the arts industry needed to do for accessibility. Especially for people with autoimmune conditions or other chronic illnesses at the moment who do not feel safe going to in-person events, especially as restrictions ease.’

Another said,

‘I believe it is still good to have both in person and online options available so that everyone who may be interested in the event can participate even if they don't feel comfortable being there in person. It also allows those who may not have the time to physically attend the events or are too far away to attend to still be able to get involved.’

Another said,

‘I think it would be great if events offered an online perspective, perhaps for people who may be immunocompromised and still worry about attending events or disabled individuals who have less ability to attend events so they can continue to participate in cultural activities however they can.’

A key tool is social media — but there are ways that these platforms can be better utilised

While some feel that content can be better catered to the interests of young, responses from young people confirm that the way offerings are communicated is a key component — regardless of what is being programmed. As one said,

‘It's not the work that needs improvement but rather the way it reaches and connects with us.’

Many shared suggestions for how social media can be used to better engage audiences in their age group. One said,

‘Continue using social media as a platform to reach existing fans and online advertising to reach new fans, sometimes using alternative imagery too. For example, a single poster posted in multiple places online will draw attention, as it can be seen as new and exciting.’

Several respondents recommended collaborating with other creators to spread awareness about events and reach an already engaged social media audience. One suggested,

‘Young people are mostly not reading the newspaper or really even using Facebook anymore. Therefore, working alongside some local influencers or TikTok creators might also help bring more young people in [...] I do think it's likely the easiest issue to fix, rather than systemic changes in the music and events people are exposed to.’

Short, easily digestible and shareable content is likely to capture the attention to social media users. One young person mentioned,

‘Short form video content, including behind the scenes and creating of events will intrigue new people and can be broadcast across more popular, newer and ever evolving social media platforms.’

Another said,

'Social media really does seem to be key to reaching my age bracket, which is further spread by individuals. Try not to shy away from certain types of media (e.g. TikTok) even if it's not your first preference, and try to establish things to get people talking about you/your work.'

Others recommended creating more opportunities for young people to interact with arts organisations through social media platforms. For instance, one suggested,

'Run some fun competitions on social media that encourage people to interact e.g. tag a friend you want to see this show with and comment what you're most looking forward to for a chance to win 2x tickets'. People in my age bracket like things that are not too expensive and that they can take photos of and share.'

Opportunities for engaging young people

The arts provide a much-needed opportunity for social interaction and connection

Survey respondents aged 30 and under were invited to respond to the question:

Many artists and cultural organisations would like to reach more people in your age bracket. Can you share any suggestions of what they could do to improve their work for you and your friends?

With [mental health a prevalent concern for Millennials and Gen Z](#) audiences, opportunities for social engagement is one of the most important motivating factor for young people, particularly as limited programming, lockdowns and cancelled events has stifled connection to others.

For some, connecting with others through cultural events is the antidote to feelings of isolation and disconnection. One person shared,

'Connect to the shared feeling of loss that young people have; this generation exists in a post-9/11, post-2008 financial crisis, war-

ridden world, and now we face a pandemic that has wiped out many of our formative years.'

Communal participation is another attractive element of social cultural outings, as one said,

'I think people my age enjoy social, interactive events. Something we can go to with friends and can chat, drink, and have something to do while we do it. For example, paint and sip venues, art gallery exhibition nights with drawing stations and fortune tellers. Allowing us to get involved is important.'

Connecting with young people requires platforming young voices and emerging talent

Young people highlighted the importance of showcasing work created by young people, as a means to connect with their age group in an even better way. One said,

'I think including and showcasing more works from people my age is a sure way to bring in people of a similar age group due to sharing similar views on social / economic issues and having a shared voice.'

Another said,

'Invest in young artists who are able to voice their stories in their own way...stop censoring people, stop cancelling people, create constructive and truly diverse art and art opportunities.'

For young people, now is the time for a greater focus on diversity and inclusion

The pandemic has shed light on pre-existing issues related to access, representation, inclusion and diversity in the arts — and feedback from young people highlights the critical role these themes play in their perceptions of cultural organisations.

A greater focus on diversity, inclusion and representation was commonly suggested by young audiences. One person shared,

‘Look at stories by and for diverse and youth audiences. Classics directed by old straight white creators do not interest younger audiences.’

Another said,

‘The industry is leaning more into sharing diverse stories. That is what people want and need to see. To learn.’

Another said,

‘Try (if it’s in line with the general nature of the performance) to reflect better the general population. For example, there are heaps of international students and young people with Asian backgrounds, and yet Asians are not very visible in performing arts.’

However, young people are aware when endeavours to be inclusive are tokenistic. As one said,

‘On the other hand, there is a trend for box-ticking diversity in the arts (“We’ve got a woman, an Indigenous person, and a gay man, so there, that’s done!”) which is to be avoided because it is unconvincing and insulting...

...Diversity in the arts is so important. I spend so much time searching for artworks that talk to my cultural background and sexuality. But it has to be organic, and authentic, and it must never be tokenistic or political or merely fashionable.’

Another shared a similar view, commenting, ‘Include way more POC in these shows instead of just the odd brown/black/Asian person.’

Young people are drawn to interactive and participatory experiences — and there is potential to explore different formats

Several young people mentioned the importance of interactive experiences that allow active participation, sharing and hands-on engagement. Some advocated for expanding the possibilities of arts

and cultural participation, to include things like interactive technology and games.

One said,

‘Respect the artistic value of video game and film music to the level it deserves. I’d like to see more live-to-projection movies and especially a game music night with symphony orchestra and chorus.’

Another said,

‘Offering an interactive experience, embracing new technology culture which could include adding exhibits that people can use to create content online that also shares the artist’s work globally.’

One recommended that this be achieved online, commenting,

‘More online presence, more engaging online interactivity – i.e. VR galleries, 3D tours of spaces, livestreams, and more interactivity.’

Another suggested,

‘Offering an interactive experience, embracing new technology culture which could include adding exhibits that people can use to create content online that also shares the artists work globally.’

As young people become more active in public spaces, non-digital marketing can capture their attention off-screen

While young people tend to be more ‘online’, social media platforms should not be the only channel of promotion used by cultural organisations.

One young person shared,

‘Social media can help, but it’s only helpful if you are following a group or a page that advertises such events. Use posters and flyers in bars and restaurants places where people are more likely to be wanting to do things...’

...Even if you have to put them in mail boxes, not everyone is glued to a phone and tuned in to every Instagram or Facebook page that shows where the next thing is. And this is coming from someone who is 24 years old.'

Key Takeaways for Engaging Young Audiences

Data collected from 743 Millennial and Gen Z audience members suggests a number of insights and potential actions:

- ▶ **Embrace their optimistic outlook:** Young people are the most optimistic of any age group. 9 in 10 are making future plans and almost all young audiences say they are confident in the vaccine effort in allowing normal events to resume.
- ▶ **Prioritise affordable participation:** Young people are more cost sensitive — they are spending less, more likely to cite financial barriers and advocate for pricing models that consider student budgets, such as discounts, ticket and meal/travel packages and refund policies.
- ▶ **Offer ticket flexibility:** Most young people are booking within the same month, and qualitative comments reveal an appetite for 'rush tickets', tendencies towards affordable options, spontaneity and last-minute decision making.
- ▶ **Platform young and diverse voices:** Some feel that 'high art' experiences can feel exclusionary. Young people want to see themselves represented and have arts organisations reflect the diverse voices in their community.
- ▶ **Encourage COVID-safe attendance:** Young people are the most eager and active of any audience age group, with 9 in 10 currently attending. The majority are happy to comply with COVID-safety measures, so ensuring protocols are in place will help to reassure the 1 in 3 who are more cautious about the risks.

- ▶ **Explore new possibilities:** Interactive and innovative formats are attractive to young people — don't be afraid to push the boundaries, experiment with new models and widen the definition of 'arts' to include games and VR.
- ▶ **Don't trivialise important issues:** Some marketing targeted at young people can 'cheapen' important issues — they are savvy to obvious sales pitches. Use tools and messages that represent them, by platforming young voices, collaborating with known digital creators and encouraging active participation through social media campaigns.
- ▶ **Interactive elements bring digital experiences to life:** Digital plays a bigger role for young people compared to others. Reach them through participatory formats such as tutorials and opportunities to create and share content.
- ▶ **Non-digital marketing is also important:** Some young people feel they lack awareness of what's happening — while many want to participate, they are missing out due to lack of targeted campaigns, out-of-touch messages or organisations solely relying on social media. While many are online, young people are becoming more active in public spaces: posters, billboards, signs, flyers and merchandise can capture their attention off-screen.
- ▶ **Foster hope and connection:** Young people are the most drawn to light-hearted things and many are conscious of the negative impacts on mental health after two years of the pandemic. Opportunities to reconnect and share experiences as a community are very important.

What's Next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also 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

The Audience Outlook Monitor study in Australia is supported by the Australia Council for the Arts, Create NSW, Creative Victoria, the Queensland Government through Arts Queensland, Department of the Premier and Cabinet (Arts South Australia), Department of Local Government, Sport and Cultural Industries (DLGSC) WA and artsACT.

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.