

FACT SHEET: First Nations

COVID-19 Audience Outlook Monitor
Australia, May 2020

First Nations respondents:

27%

of First Nations respondents are ready to attend events as soon as it's permitted

77%

of First Nations respondents are participating in online arts and culture

42%

of First Nations respondents participating online are engaging for their own wellbeing

Audiences for First Nations work:

1 in 4

audience members attended a First Nations arts and culture event in 2019

46%

of audiences for First Nations work have paid for an online arts experience recently

39%

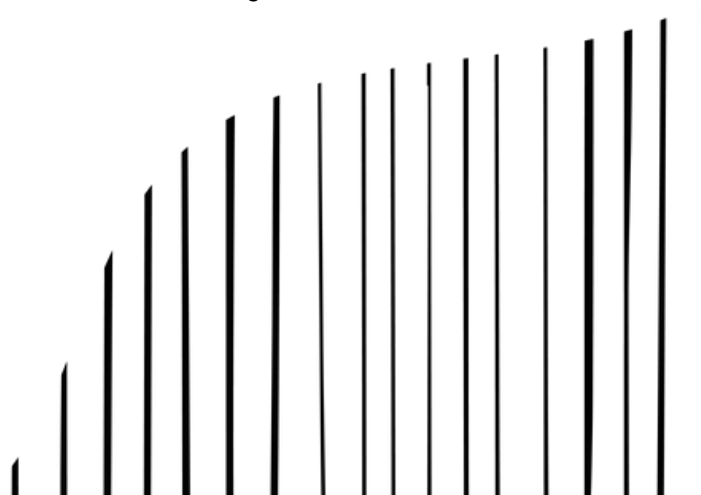
of those paying for experiences online have spent more than \$50



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**AUDIENCE
OUTLOOK
MONITOR.**



Summary

Initial findings of the Audience Outlook Monitor were released on 18 May 2020, confirming the challenging outlook for re-engaging audiences with all kinds of arts and culture events.

This Fact Sheet describes how First Nations respondents feel about engaging with arts during the pandemic and how audiences for First Nations work feel about attending. One quarter (24%) of the 23,000 respondents had attended a First Nations arts and culture event in the 12 months prior to the COVID-19 pandemic.

First Nations respondents value cultural events highly and are ready to attend sooner than other audiences

Of the sample drawn from the databases of 159 Australian arts and culture organisations, there were 177 people who identified as First Nations. This group place a high value on culture and there are indications they want to return to events sooner than others. However, those who experience underlying health conditions, or are close to people who do, are deeply cautious about the risk to individuals and the potential loss of life and cultural knowledge in their communities.

First Nations respondents in the sample are highly engaged with arts activities at home and are highly likely to be participating online. Compared with other audiences, First Nations respondents are more likely to say that supporting their wellbeing is one of their top motivations for engaging with arts and culture online.

Audiences for First Nations work are also eager to return, though many have been financially impacted

The 5,639 recent attendees of First Nations work are also strongly engaged with arts and culture. On average, they are more highly educated than other audiences and have a slightly younger age profile. They attend the arts more



frequently and are more likely to earn a living as an artist or arts worker themselves, compared to other audiences.

Audiences for First Nations work are more likely to be making future plans to attend, relative to other audiences, but they are booking further into the future (January 2021 or later).

This may be linked with the fact that this group has been financially impacted by the pandemic to a greater degree than other audiences. Audiences for First Nations work are more likely to be experiencing a loss of household income (43%) than other audiences (38%).

The market for First Nations art experiences online is significant and warrants further investment

Audiences for First Nations work are strongly committed to supporting arts and culture organisations during the pandemic. Many report discovering new artists and enjoying live streamed performances of First Nations work.

This group is more likely than other audiences to be paying to experience arts and culture online, even if they have been financially impacted. They are also relatively more likely to be spending over \$50 on arts experiences online (39%), compared to other audiences (36%).

In combination, these findings confirm an important and ongoing role for digital technology during and after the pandemic: to help support the wellbeing of First Nations people, to enable audiences to discover and learn more about First Nations arts and artists, as a vital revenue stream for arts and culture organisations, and to maintain engagement among audience segments who are financially impacted by the pandemic.

This Fact Sheet is based on data collected from audiences of 159 organisations nationally

The data reported in this Fact Sheet was collected as a part of the Audience Outlook Monitor, a study tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.



Baseline data was collected in May 2020 in a cross-sector collaborative survey process involving 159 arts and culture organisations. These organisations simultaneously sent a survey to a random sample of their audiences who had attended a cultural event since January 2018.

This Fact Sheet outlines key findings about 177 respondents who identify as First Nations, and 5,639 respondents who attended First Nations work in the previous 12 months, based on the Audience Outlook Monitor in Australia.

Results from over 23,000 respondents nationally have been aggregated in a freely available dashboard, to assist artists and cultural organisations of all kinds to understand how audiences feel about attending events again. By aggregating the data from 159 organisations, this study provides a detailed resource with insights about different art forms, types of events and demographic groups in all parts of Australia.

The Audience Outlook Monitor is part of an international study being delivered in Australia by Patternmakers (Australia) and WolfBrown (USA), with support from the Australia Council for the Arts and state government agencies around Australia.

This data has limitations and should be interpreted with caution

It is important to note the limitations of this dataset, including the small sample size of First Nations respondents, the sample frame (the databases of participating arts and culture organisations) and the survey administration method (online survey promoted via email). This data does not reflect the views of First Nations people generally and should be interpreted with caution.

To access the dashboard, or read more about the study, visit the study's Australian homepage: <https://www.thepatternmakers.com.au/covid19>.

Read on for the key findings about First Nations respondents and audiences for First Nations work nationally.



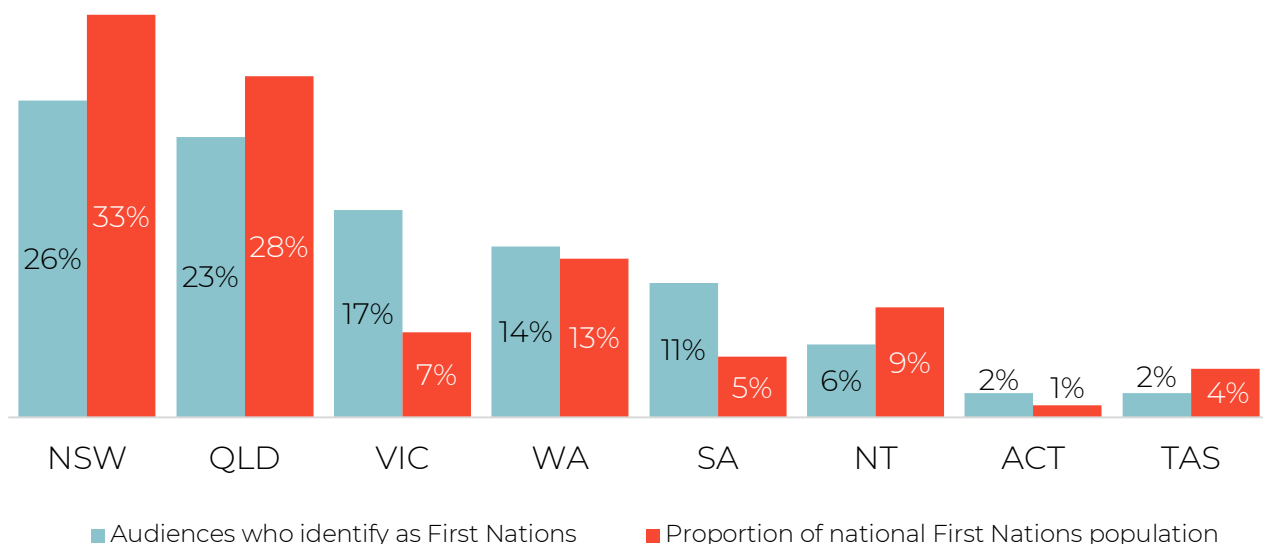
First Nations respondents

Profile of First Nations respondents

The Audience Outlook Monitor heard from 177 First Nations people living throughout Australia

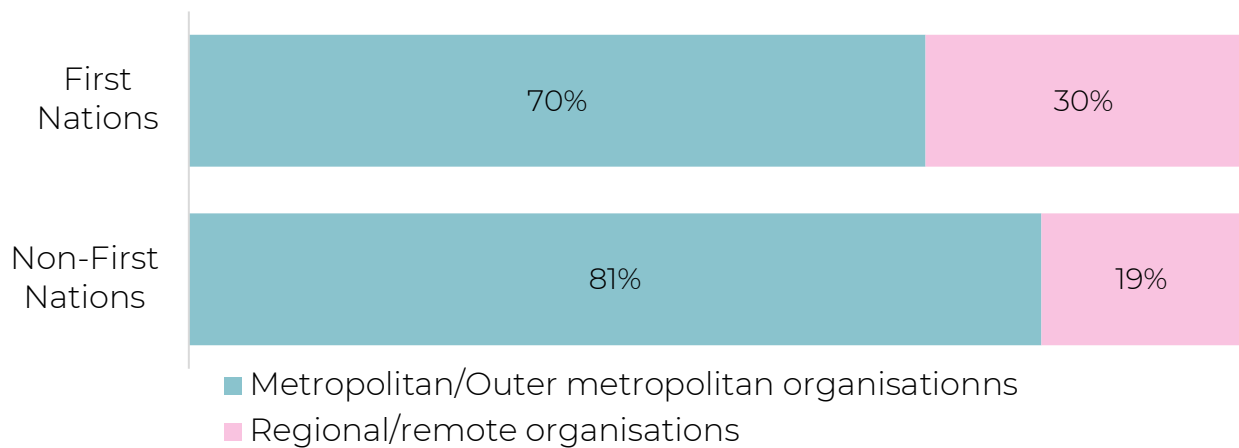
- ▶ People who identify as Aboriginal and/or Torres Strait Islander make up 1% of the total number of respondents, or 177 people. This is less than the proportion of Aboriginal and/or Torres Strait Islander people in the population (3%).
- ▶ Among the First Nations respondents, 88% identify as Aboriginal, 8% identify as both Aboriginal and Torres Strait Islander and 4% identify as Torres Strait Islander.
- ▶ The geographical spread of First Nations respondents broadly follows the population. However, First Nations people in Victoria and South Australia are slightly overrepresented, while those in other states and territories are slightly under-represented.

Figure 1: Which Australian state or territory do you currently reside in? n=177



- ▶ A greater proportion of First Nations respondents are connected with organisations in regional or remote locations (30%) compared to non-First Nations respondents (19%).

Figure 2: Regional/metro split of respondents (by First Nations identity) N=22,453



First Nations respondents have a different demographic profile to other audiences

- ▶ There are some differences in the demographic characteristics of First Nations respondents, compared with other audience respondents in the sample. These should be kept in mind when interpreting the findings (along with the limitations of the sample noted in the Background).
- ▶ More than half of First Nations respondents (54%) report that they experience a serious health vulnerability, or live with someone who does, that makes them susceptible to COVID-19. This compares with 45% among non-First Nations respondents.
- ▶ First Nations respondents are less likely to have a bachelor's degree or higher (58%), compared to non-First Nations respondents (68%), but are more likely to be employed full-time (40%) compared to non-First Nations respondents (28%).
- ▶ A greater proportion of First Nations respondents are under 65 years old (80%), compared with non-First Nations respondents (63%). The proportion of First Nations respondents who are retired is less than half (16%) of those who do not identify as First Nations (33%). More First Nations respondents are parents or caregivers to children (32%), compared to other respondents (21%).
- ▶ First Nations respondents on average have a slightly lower household income relative to other respondents, with 8% reporting a weekly household income of \$3,000 or more, compared to 13% of non-First Nations respondents.

First Nations respondents are relatively more engaged in arts and culture

- ▶ First Nations respondents are relatively more engaged in arts and culture, with 42% attending the performing arts once a week or more prior to the COVID-19 pandemic, compared with 37% of non-First Nations respondents. 19% of First Nations respondents attended museums and galleries once a week or more, compared to 17% of non-First Nations respondents.
- ▶ First Nations respondents are significantly more likely to have attended First Nations arts and culture (96%), compared with non-First Nations respondents (33%).
- ▶ The proportion of First Nations respondents who earn a portion of their living from performing or creating art of some kind (34%) is more than double that of those who do not identify as First Nations (15%).

Returning to events

First Nations respondents are more positive about attending again

- ▶ First Nations respondents are feeling more confident about returning to arts and culture events, with 27% saying they are ready to attend as soon as it's permitted, compared to 22% of non-First Nations respondents.
- ▶ At the time of data collection (mid-May 2020), First Nations respondents were also more likely to be making firm plans to attend arts and culture events (19%), compared to non-First Nations respondents (14%).
- ▶ When asked about their level of comfort attending different types of venues and events, generally their views follow that of other audiences. However, a larger proportion of First Nations respondents said they would feel comfortable using hands-on exhibits at interactive museums (34%) compared to non-First Nations respondents (24%). They also feel more comfortable attending a comedy club or live music venue (45%) compared to non-First Nations respondents (30%).
- ▶ Long-term, First Nations respondents are optimistic about returning to arts and culture events, with 77% planning to attend just as they did before the pandemic, similar to the national rate (78%). More First Nations respondents



say they plan to attend more often than before (11%), compared to non-First Nations respondents (7%).

First Nations respondents are more likely to want new types of content when events resume

- ▶ When asked about the types of content people want to see when events resume, most First Nations respondents (84%) say they will be interested in attending the same kinds of performances as they did before. However, this is slightly less than the proportion of non-First Nations respondents (92%).
- ▶ First Nations respondents are more likely to say they want to attend more light-hearted programs (28%) upon returning, compared with non-First Nations respondents (21%). They are also more likely to want to see content that helps make sense of the pandemic (30%) compared to non-First Nations respondents (24%).
- ▶ Having the choice of attending in-person or watching a livestream is more desirable among First Nations respondents (44%) compared to non-First Nations respondents (34%), indicating a role for digital distribution to First Nations respondents long-term.
- ▶ This livestream option is more important for First Nations respondents in regional and remote locations (43%) than other respondents in regional and remote locations (35%).

First Nations respondents are slightly less concerned with venue safety measures

- ▶ Overall, most First Nations respondents will be positively influenced by venue safety measures when deciding to attend events (95%). However, there are indications that First Nations respondents would not find some measures as encouraging as other respondents.
- ▶ Like non-First Nations respondents, the safety measures that would be most encouraging to First Nations respondents are the provision of hand sanitiser and disinfecting public areas every day.
- ▶ The use of face masks is more encouraging for First Nations respondents (43% feel at least somewhat encouraged) compared to non-First Nations respondents (37% feel at least somewhat encouraged).

- ▶ First Nations respondents are slightly more likely to feel discouraged from attending by social distancing measures (7%) compared to non-First Nations respondents (4%).
- ▶ On the use of safety measures, one First Nations respondent shared, 'As long as safety guidelines are put into practice, I see no reason not to go out to anything that I choose to see or do.'
- ▶ 5% of First Nations respondents say their decision to attend will not be influenced by venue safety measures, compared to 3% of other respondents. When sharing why safety measures will not positively influence their decision to attend events again, one person said, 'Because I'm sad that everything has been cancelled and I want them to resume rather than get refunded for all of the shows that I have already purchased tickets for.'
- ▶ Others have a philosophical outlook. One shared, 'I'm a positive person, what will be will be.' Another commented, 'My choice of show will be because it's something I want to attend. Not other factors. You could put every possible safety measure in place at some events/shows and you still wouldn't be able to drag me there.'

Those with access needs or underlying health concerns will be more careful

- ▶ Some First Nations respondents shared their hesitation to return to events due to an underlying health condition. One said, 'I am in a high-risk health category. I'd like to support our arts and cultural sector in ways other than direct participation.'
- ▶ Another concern about attending events is access needs. One First Nations respondent shared, 'I am disabled and found it hard to attend before the epidemic. Now abled people are finally realising that there are ways to help us be included even if we can't leave our house. PLEASE keep that going. Not all of us will have a normal to return to. We never did.'
- ▶ Several First Nations respondents expressed that they will be reluctant to attend due to health concerns of people close to them. One shared, 'I live with susceptible family members and feel the need to be hyper-vigilant.' Another said, 'As I live with someone with a compromised immune system, I am very concerned about returning to previous activities.'
- ▶ Similarly, another First Nations respondent highlighted safety as a priority for older people in their community: 'I am in a high-risk group as are most of the



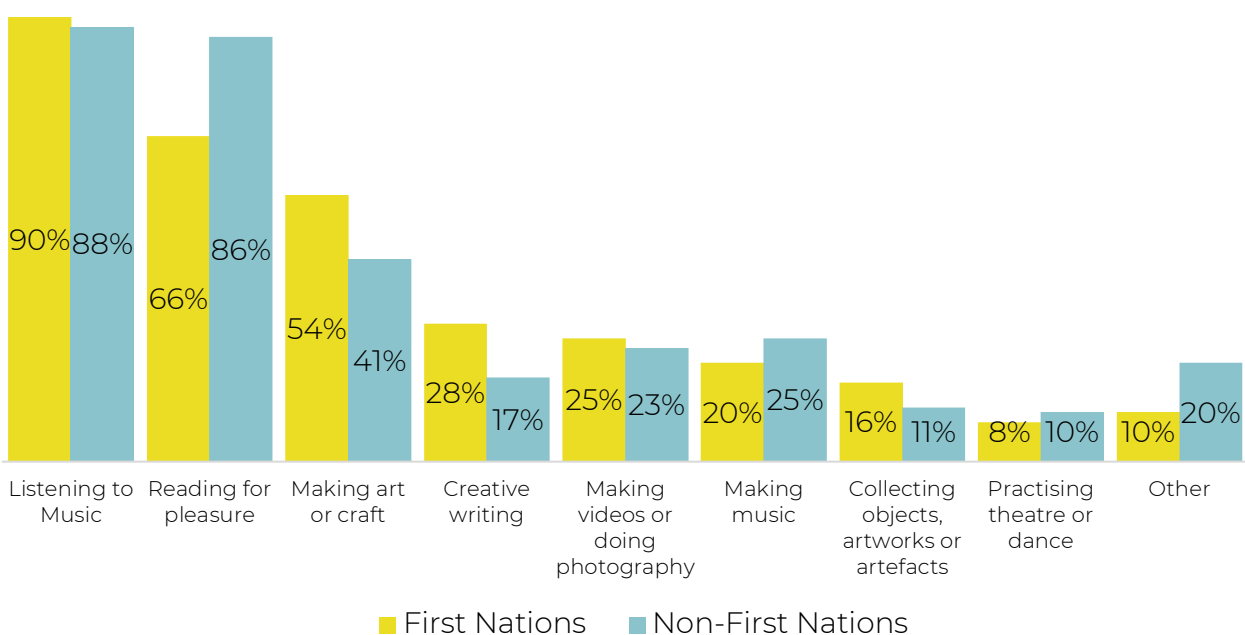
artists and arts workers that I usually work with. Their care and safety is a high priority for me as we can't afford to lose our old people and their irreplaceable knowledge.'

Participating from home

First Nations respondents are highly engaged in creative activities at home

- ▶ Almost half of First Nations respondents (46%) are participating in creative activities at home more frequently than before the pandemic, this is a similar rate to non-First Nations respondents (45%).
- ▶ Listening to music and reading for pleasure are the most common creative activities for both First Nations and non-First Nations respondents. However, a larger proportion of First Nations respondents are making art and craft (54%), creative writing (28%) and collecting objects and artefacts (16%) compared to non-First Nations respondents.
- ▶ In contrast, making music is a more popular activity among non-First Nations respondents (25%) compared with First Nations respondents (20%).

Figure 3: In the past fortnight, have you done any of the following creative activities at home? (multiple can be selected) n=8,173



- ▶ First Nations respondents who selected 'Other' mentioned activities such as participating in cultural art-making. One respondent said, 'Creating Indigenous artwork' and another said, 'lots of arts and craft with the kids and practised my traditional song and dance.'
- ▶ Other First Nations respondents shared that they have been participating in 'gardening, baking, letter-writing, photo book[ing]', 'gardening, cooking' and 'sewing, listening to podcasts.'

Online engagement

Online participation in arts and culture is common among First Nations respondents

- ▶ The proportion of First Nations respondents who are participating in arts and culture activities online is consistent or slightly higher (77%) compared to that of non-First Nations respondents (75%).
- ▶ First Nations respondents are participating in all digital activities probed in the survey, with the most popular being watching a pre-recorded video of a performance or event (50%), watching a live-streamed performance or event (47%) and doing an online class, course or tutorial (43%).
- ▶ First Nations respondents are discovering new works online at the same rate as non-First Nations respondents (both 29%). One-third of First Nations respondents (34%) are participating online more frequently than before the pandemic, which is slightly less than the proportion of non-First Nations respondents (38%).
- ▶ When asked about their motivations for participating online, more First Nations respondents said that they were motivated to improve their mental wellbeing (42%), compared with non-First Nations respondents (34%). They are also more likely to want to participate to share an experience with others (22%), compared with non-First Nations respondents (16%).

Affordable and accessible digital offerings will be critical to First Nations respondents

- ▶ Among First Nations respondents, one-third (35%) are paying for online arts and culture experiences, which is comparable to non-First Nations respondents (34%).



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- ▶ First Nations respondents are spending slightly less than non-First Nations respondents on online experiences, with 58% spending between \$10 and \$50, compared with 53% of non-First Nations respondents. Slightly fewer First Nations respondents have spent \$50 or more (33%), compared with non-First Nations respondents (36%).
 - ▶ For First Nations respondents who have paid for an online arts experience, those with a serious health vulnerability in their household are more likely to have paid for a single experience (16%) compared to those with no serious health vulnerability (3%), again confirming a role for digital technology in enabling access.



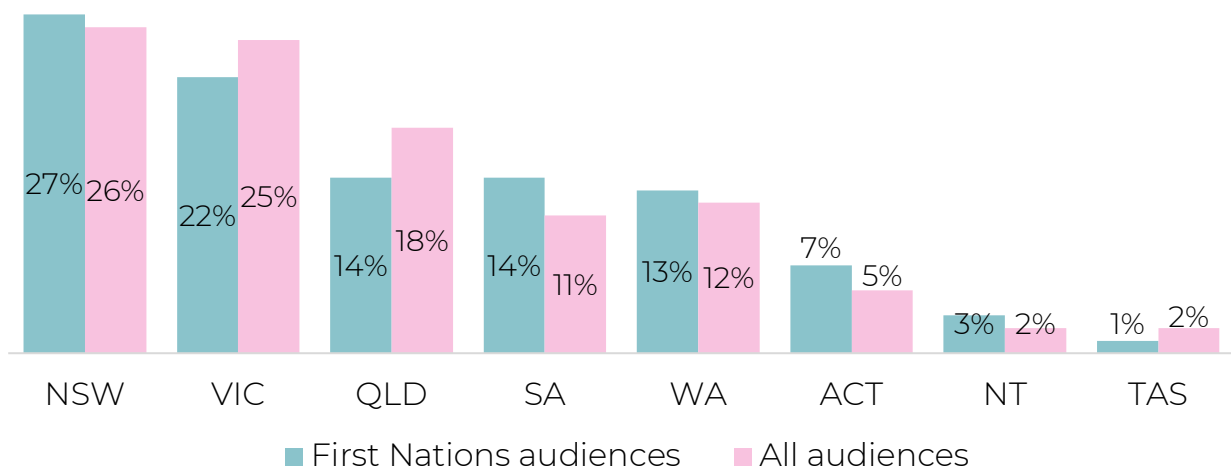
Audiences for First Nations work

Profile of audiences for First Nations work

On average, audiences who engage with First Nations work are more highly educated than other audiences

- ▶ Among the total audience members surveyed, one-quarter (24%), or 5,639 people have attended First Nations arts and culture in the past 12 months.
- ▶ First Nations arts and culture are more commonly attended by people under 65 (66%) than other artforms (64%). Attendance decreases with age, with 32% of 65 to 74-year old's attending, and 23% of people 75 and older attending.
- ▶ On average, audiences for First Nations work are more highly educated than other arts audiences. The majority (80%) have a bachelor’s degree or higher, compared with 68% of audiences overall.
- ▶ People in all states and territories engage with First Nations work, and most reside in New South Wales (27%) and Victoria (22%), indicative of the high population of First Nations people living in these regions, as well as the amount of work being created and presented.

Figure 4: Which Australian state or territory do you currently reside in? n=22,871



- ▶ The majority of the audience for First Nations work does not identify as Aboriginal or Torres Strait Islander themselves (96%). First Nations respondents comprise 2% of audiences for First Nations arts in the sample and 1% of the total sample, compared to 3% in the population nationally (3%).
- ▶ A slightly larger proportion of the audience for First Nations work identifies as female (77%), compared to other audiences (73%).

Audiences for First Nations work are highly engaged with art and culture

- ▶ A larger proportion of audiences for First Nations work earn their living as artists or arts workers. One in four earn an income from performing or creating art of some kind (27%), compared with audiences of other art forms (16%).
- ▶ Audiences for First Nations work attend arts and cultural events more frequently than other audiences. While 27% of audiences for First Nations work attend performing arts once a week or more, this is true for 14% of all audiences.

Returning to events

Audiences for First Nations work are optimistic about attending in future

- ▶ Long-term, audiences for First Nations work are planning to attend arts and culture activities just as they did in the past (83%), similar to those audiences who don't attend First Nations work (85%). A smaller number say they expect to attend more frequently (9%) after the pandemic, but this is a slightly higher proportion compared other audiences (7%). Audiences of First Nations work who attend the performing arts frequently are even more positive (12%).
- ▶ Audiences for First Nations work are more likely to have planned to attend an event in the fortnight before data collection (17%) than the national average (14%). However, they are booking later: 47% of those making plans are booking events in January 2021 or thereafter, compared to other types of audiences (44%).
- ▶ The optimism in this group partially reflects that this group is strongly engaged with arts and culture in general. However, across a range of indicators, they are even more positive than other groups who attend the arts frequently. For instance, frequent performing arts attendees who attend First Nations work

say they are more likely to seek out work that deals with the pandemic in its content (42%) compared with frequent performing arts attendees who don't attend First Nations work (36%).

Overall, venue safety measures will positively affect decisions to attend First Nations work

- ▶ Overall, venue safety measures will positively influence the decision to return to events for audiences of First Nations work (98%) slightly more than other types of audiences (96%).
- ▶ Audiences for First Nations work feel more encouraged by the use of face masks when returning to events than other types of audiences, with 40% feeling at least somewhat encouraged by this safety measure, compared to 37% for other types of audiences. However, it should be noted that attitudes towards face masks vary across the state/territories of Australia, and are more polarising in states that have fewer, or no current cases of COVID-19 (the Northern Territory, Western Australia and South Australia).
- ▶ Some audiences for First Nations work say they would not be influenced by venue safety measures. When explaining their view, some say they are willing to take the risk in order to attend arts events. One person shared, 'I'm interested in the art primarily. Knowing there's hand sanitiser available won't influence my decision'. Another said, 'Art and cultural events have a very high value in my life. I am prepared to take a risk to enjoy my cultural activities'.
- ▶ One respondent felt that venue safety measures would actually be quite discouraging: 'The body fear associated with this virus is more alarming to me than the possibility of sickness. I would hate to reinforce the fear with these measures. I also doubt if an overly sanitised environment is good for our immune systems.'

Participating from home

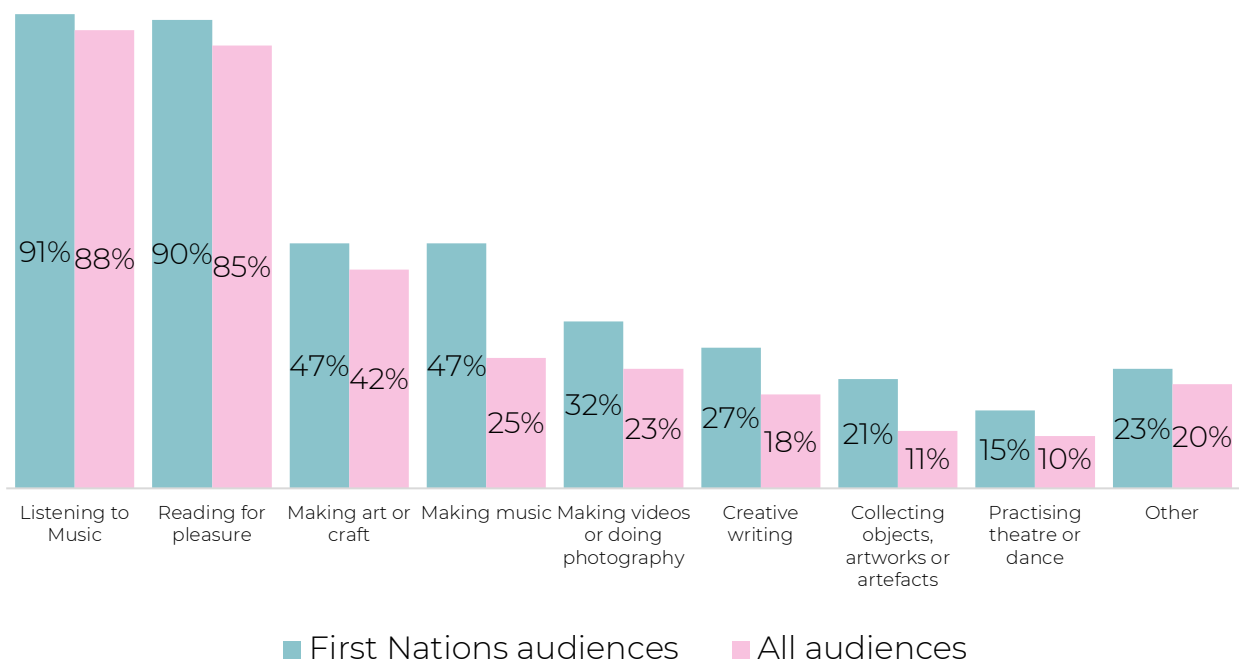
Audiences for First Nations work are creatively participating at home more than other audiences

- ▶ Audiences for First Nations work are participating in creative activities at home at a higher rate than other types of audiences, which is consistent with the high levels of cultural engagement noted above.



- ▶ While this group is commonly listening to music (91%) and reading for pleasure (90%), a greater proportion are participating in other popular activities such as making art and craft (47%), making music (47%) and making videos (32%), compared with national rates.

Figure 4: In the past fortnight, have you done any of the following creative activities at home? (multiple can be selected) n=8,477



- ▶ Audiences for First Nations work are creatively participating more frequently than before the pandemic (52%), compared with audiences of other art forms, such as performing arts (46%) and cinema and film (47%) attendees.
- ▶ However, this is less true for younger audience groups. Around half of audiences for First Nations work under 35 years are creatively participating more frequently than before (52%), which is less than other audiences (57%).
- ▶ Audiences for First Nations work who attend the performing arts frequently are creatively participating more than other frequent performing arts attendees. In particular, a greater proportion are making art and craft (43% vs 40%), creative writing (30% vs 27%), making videos or doing photography (35% vs 28%), making music (34% vs 30%), collecting objects or artefacts (25% vs 17%) and practicing theatre and dance (22% vs 16%).

Online participation is more common among audiences for First Nations work than audiences of other art forms

- ▶ Audiences for First Nations work are participating in online arts and culture activities at a higher rate (86%) than the national audience average (75%).
- ▶ The most common online activities, that this segment are participating in, include watching a pre-recorded performance or event (63%), watching a live-streamed performance or event (56%) and doing an online class, course, or tutorial (46%).
- ▶ Online discovery of new work is also more common among audiences for First Nations work than other types of audiences, with 47% sharing that they have discovered a new artist, artwork or performance online compared with the national average (42%).
- ▶ Audiences for First Nations work are more likely to have paid for an online arts experience recently (46%) compared with other audiences (34%). They are more likely to say they are at least somewhat likely to pay a small amount for access to digital programs in future (76%) compared to other audiences (68%).

Audiences are discovering First Nations visual art online during the pandemic

- ▶ Qualitative comments by audiences suggest that free online content has helped people learn more about First Nations artists. Several people mentioned learning from virtual tours/collections, including those of major institutions, during the pandemic:
 - 'I went to the NGV's website...I was shown four Indigenous artists and their interpretation of the artwork ... The use of common symbology with Indigenous art of 60,000 years was discussed and was of interest to me. I learnt a great deal in 30 minutes online.'
 - 'I received a note asking me to view a particular piece of Indigenous art by Yukultji Napangati which was accessible online, and I viewed it and a number of her works, as though I was in a gallery. Very enjoyable.'
 - 'I loved watching NGA's This Place: Artists series. Indigenous artwork fills my heart and I love listening to [Indigenous] stories. One in particular was memorable because it was from an art centre in

Warmun, WA and that was the last road trip we did before the lockdown, we drove from Darwin to Broome.'

- ▶ Commercial galleries and art centres are also playing a role in fuelling discovery of First Nations artists online:
 - 'We get regular email from an Indigenous art gallery. Looking through their latest exhibition online. Discovered some new artists from an area I wasn't familiar with.'
 - 'I get a regular email showcasing Aboriginal artists and some were new to me.'
 - 'Looking at Indigenous-owned art [gallery shops] online.'

Streaming of performances may be helping grow audiences for First Nations work

- ▶ Several respondents described moments of discovering First Nations performing artists, with one person saying they found new interests by, 'Reading about artists on Twitter for [an] upcoming Indigenous festival'. Another said, 'I discovered the Skinnyfish TV channel on YouTube and found a lot of Indigenous artists new to me.'
- ▶ When asked about what was most memorable about works they had experienced online, several respondents mentioned First Nations works, or works that involved First Nations perspectives. Examples included:
 - 'Arnhem land music performance video. Enjoying the rare footage of that area and getting to see new Indigenous musicians.'
 - 'Eumerella requiem [Melbourne Symphony Orchestra] Cheetham Mourning Indigenous white wars of the past.'
 - 'My first online [Australian Dance Theatre] performance*, which will be fortnightly, was a wonderful surprise. It was stunning to watch, the athleticism, but particularly the Indigenous contribution, the musicians & singing in Kurna language, made it a most memorable experience. (*The beginning of nature).'

- ▶ One person shared that this could lead them to attend physical events post-pandemic: 'I've discovered performances from various arts companies around the world who are offering free streaming of their past performances e.g. National Theatre, Australian Ballet, Bangarra. Watching a past performance has encouraged me to seek out the works of these companies in the future.'

Bangarra stood out as a particularly memorable experience during the pandemic

- ▶ When asked about discoveries made online during the pandemic, seven people mentioned discovering Bangarra Dance Theatre, and when asked what their most memorable online arts experience was, a total of 70 people mentioned Bangarra.
- ▶ Some described experiencing the company's work for the first time online ('I saw Bangarra streamed via [Sydney] Opera House, which I'd never seen before despite being keen for years'), or catching up on works they had missed live ('Wonderful to watch something that I had missed out on seeing live and would not have opportunity to see again probably.')
- ▶ Others were reliving a past live experience, as one person said, 'I had seen the show live twice before, but it was memorable [this time] because it was beautifully filmed, and it gave me an opportunity to look more closely at costumes and facial expressions.'
- ▶ Several mentioned enjoying a digital Bangarra performance with family and friends in other locations, and one said that the format had enabled them to introduce this work to others, explaining, 'I introduced a number of people to the work of Bangarra Dance Theatre after recommending people watch a live stream of a performance I had seen live in the past.'
- ▶ A range of Bangarra works were mentioned, including Bennelong and Terrain. When describing why the experience was memorable, people used words like 'uplifting', 'storytelling through movement', 'beautifully presented' and 'so creative and well recorded'.
- ▶ Although some said they felt it would be even better live, in general those commenting suggested the quality was excellent and that it 'captured some of the performance feeling'.
- ▶ Some people felt the online format allowed for a deepening of the experience. One person said, 'It was great to see people's comments live. [It] felt like I was experiencing it with them.' Another said, 'The accompanying interview with

choreographer Frances Rings was so illuminating and enlightening and added so much to my enjoyment and understanding.'

- ▶ Several commented that the online experience made them more interested to experience it in-person. One person said, '[It was] memorable due to the dancing and the way the story of Bennelong was portrayed. [It] made us want to see more of Bangarra.'

Support

Audiences for First Nations work are strongly committed to supporting artists and organisations that are important to them

- ▶ Consistent with high levels of cultural engagement generally, audiences for First Nations work feel more committed to supporting arts and organisations that are important to them during the pandemic (54% strongly committed and 42% moderately committed), compared to other arts audiences (37% strongly committed and 53% moderately committed).
- ▶ Audiences for First Nations work say they are more likely to participate in all forms of support, in particular making a donation (79% relative to 68%) and buying merchandise (63% relative to 56%).
- ▶ Audiences for First Nations work are more likely to have paid for an online arts experiences (45%) compared to other audiences (34%).
- ▶ Among those who are spending money on online arts and culture activities, audiences for First Nations work are more likely than other audiences to have spent \$50 or more (39% relative to the national average of 36%). They are also more likely to be engaging in all forms of payment, particularly making donations (30%) compared to other types of audiences (20%).
- ▶ When asked about their motivations for engaging in online activities, audiences for First Nations work are more likely to want to support an artist or arts organisation that they feel is important to them (47%), compared to other types of audiences (39%).
- ▶ On their commitment to supporting artists and organisations that are important to them, one person shared, 'I work in the Aboriginal art centre, and we are doing everything to ensure we remain operational - both financially and physically - post [COVID-19].' Another shared, 'Being an Aboriginal elder in my community it means so much to us.'



- ▶ Another commented, 'Art centres are [an] extremely important way to keep culture living and breathing. It generates income that allows Aboriginal people to live on country in communities. And an important entry point for people around the globe to understand and access the sacred lives of aboriginal people and culture.'

Digital technology is increasingly important as more First Nations audiences are being financially impacted

- ▶ Almost half (43%) of audiences for First Nations work have experienced a loss of household income as a result of the pandemic – to an even greater extent than audiences overall (38%).
- ▶ Audiences for First Nations work who have been impacted financially have been consuming a broader range of online arts experiences, with 60% having watched a live streamed performance or event, compared to 53% of audiences for First Nations work who have not been impacted financially.
- ▶ Audiences for First Nations work who have been impacted financially are also more likely to be creating content to share online themselves (20%) compared to those who have not been impacted financially (11%).
- ▶ This group is also more likely to be making discoveries online. More than half (54%) have personally discovered a new artwork or artist, relative to 41% of audiences for First Nations work who have not been impacted financially.
- ▶ While audiences for First Nations work are more likely to have experienced a loss of household income, those who have been impacted are continuing to engage deeply online. In fact, those who have been impacted are more likely to have paid for an online arts experience (48%), compared with those who haven't experienced financial loss (44%).
- ▶ However, they are spending slightly less and show signs of greater price sensitivity. One-third (33%) of this financially-impacted group have paid over \$50 relative to 43% of audiences for First Nations work who have not lost household income, and 11% say that a barrier to engaging online is that digital offerings are out of their price range. This compares with 4% of audiences for First Nations work who have not lost household income and 5% of all audiences.



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- ▶ With the financial impacts of the pandemic expected to last for some time, continued engagement of this group through online experiences will be critical, and paid offers and campaigns should be designed accordingly.
 - ▶ Communications will also play a key role in maintaining engagement with audiences for First Nations work who are financially impacted. Those who have experienced a loss of household income are more likely to want updates from artists and other creatives associated with an arts organisation (45%) compared with those who have not lost household income (35%).



What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the dashboard at the link below. You can also browse the existing resources or sign up to receive future releases as soon as they are available.

<https://www.thepatternmakers.com.au/covid19>.

In the coming weeks, we'll be analysing other breakdowns in more detail, to provide you with more insights about key topics.

We'll also provide tips and practical steps you can think about to apply the findings in your work.

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



Australia
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CREATIVE VICTORIA



Department of
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Government of South Australia
Department of the Premier
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Queensland
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