

FACT SHEET: Online engagement

COVID-19 Audience Outlook Monitor
Australia, May 2020

17,797

audience members have participated in online arts and culture activities

34%

have paid for online arts and culture content recently

37%

are doing online arts and culture activities more frequently than before the pandemic

68%

are likely to pay a small amount for access to digital programs in future

67%

of those participating more frequently will continue after the pandemic

36%

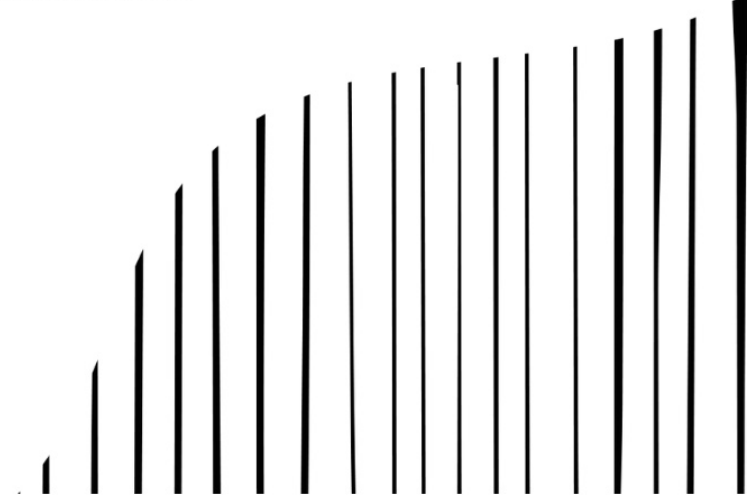
of those paying have spent \$50 or more on online arts and culture

52%

are watching pre-recorded performances and events



**AUDIENCE
OUTLOOK
MONITOR.**



Summary

Initial findings of the Audience Outlook Monitor were released on 18 May 2020, showing that 75% of Australian audiences are participating in online arts and culture activities during the pandemic.

This Fact Sheet provides further insight into the segments who are participating, their motivations and barriers in accessing digital offerings, the types of activities they are participating in and opportunities for further development.

Digital distribution of arts and culture content has enabled audiences to stay connected to artists and arts organisations during the pandemic, and to one another during periods of social isolation.

Digital offerings are particularly valued by those segments with limited access to arts and culture – including those living with a disability, those with caring responsibilities and/or those living remotely. While many audiences are looking forward to attending physical events again, some want digital to remain an option as venues re-open.

A sizeable minority of audiences are paying for experiences online and there are opportunities to continue investing in digital marketing and innovation.

Background

This Fact Sheet outlines key findings about online engagement based on the Audience Outlook Monitor in Australia, a study that is tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

It's 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.

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.

Results from over 23,000 respondents 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 all different artforms, types of events and demographic groups in all parts of Australia.

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

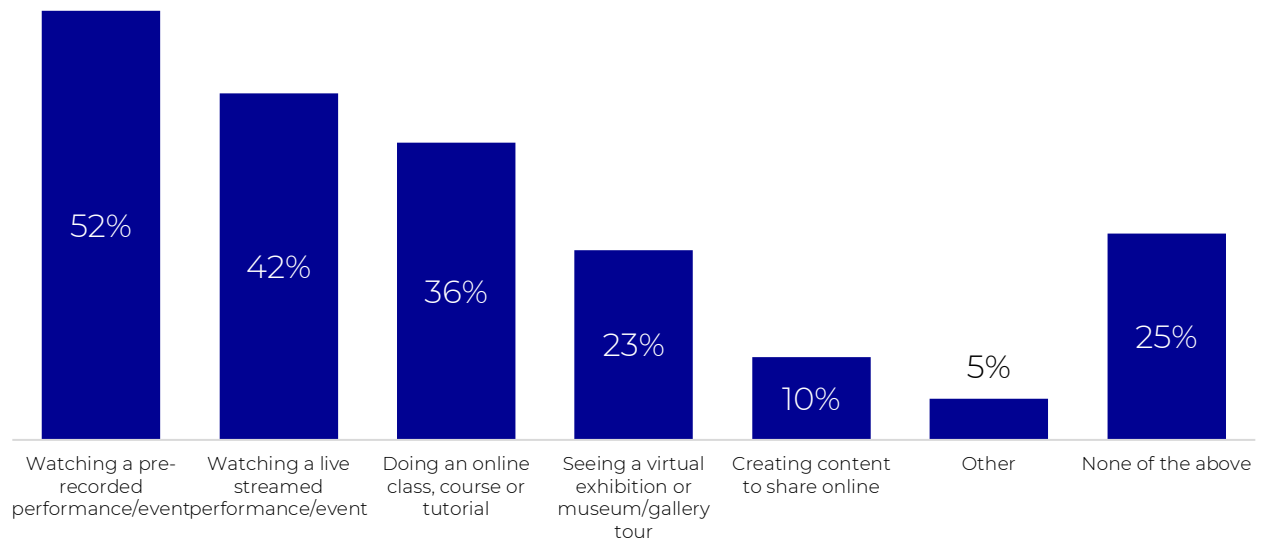
Read on for the key findings about online participation nationally.

Online participation

Three-quarters of audiences are participating in arts and culture online

- ▶ Most audiences surveyed (75%) are participating in online arts and culture activities, like watching arts video content (52%), watching live-streamed events (42%) or doing online classes or tutorials (36%).

Figure 1: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) n=23,730



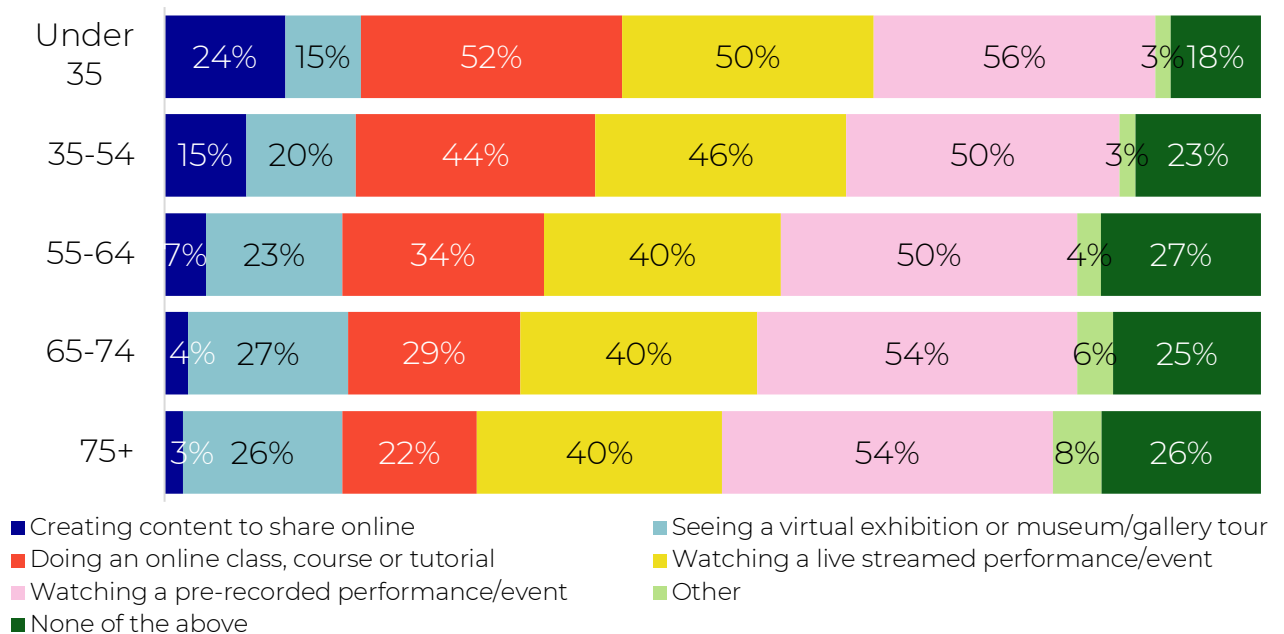
- ▶ Online participation is particularly high among audiences who normally attend the performing arts more than once a week (90%), and those who visit museums and galleries weekly or more (89%), compared to those who attend less often.
- ▶ Over one-third of audiences (37%) say they are doing online arts and culture activities more frequently than before the pandemic and many of these say they plan to continue doing so after the pandemic (67%).
- ▶ The intention to continue participating is higher for people who experience a serious health vulnerability, or live with someone who does (71%), confirming the importance of digital distribution for access.
- ▶ Those who frequently attend the performing arts are more likely to be participating online (90%), but less likely to say they will continue after the pandemic (58%). This is consistent with findings that frequent attendees are most eager to start attending physical events again.

Online participation is occurring in all age groups

- ▶ In terms of the rate of participation, the proportion is highest among those under 35 (82%) compared to other age groups (77% for those aged 35-54, 73% for those aged 55 to 64, 75% for those aged 65-74 and 74% for those aged 75 and older).



Figure 2 : During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) By age. n=23,730



- ▶ The most common form of online participation among all ages is watching a pre-recorded performance: 54% of audiences aged over 75 have watched a pre-recorded performance in the past fortnight, similar to the proportion of under 35s (56%).
- ▶ Audiences over 75 are more likely to participate in virtual exhibitions or museum and gallery tours (26%) than audiences under 35 (15%). However, those under 35 are more likely to participate in online classes or tutorials (52%) compared to those over 75 (22%).
- ▶ Online participation is particularly high among audiences of First Nations work (86%) compared to the national average (75%). Those who attend other artforms, such as museum-goers (78%) and those who attend literature events (79%), also report slightly higher rates of online participation than the national average (75%).
- ▶ When selecting which activities they've engaged with, caregivers of older adults revealed that they are more likely to take an online class or tutorial (39%), compared with those who aren't caregivers (35%).

Motivations and barriers

Online arts activities enable audiences to stay connected to the arts

- ▶ Overall 90% of audiences say they feel moderately (53%) or strongly (37%) committed to supporting arts and cultural organisations that are important to them during the pandemic. This sentiment has been a driving factor for people to engage online.
- ▶ Similarly, when asked what motivated them to engage in online arts and culture activities recently, more than one-third say they were motivated to support an organisation they feel is important (38%). One person shared: 'Providing something to assist the community in this time.'
- ▶ Without the ability to attend physical experiences, one person shared that digital offerings had allowed them to experience the work they enjoy in a different way, sharing, 'Missing live performances and the stimulation of new things so [I'm] finding different ways to participate.'

Supporting wellbeing is a key motivator for audiences participating online

- ▶ One-third of audiences (34%) say that supporting their own wellbeing during the pandemic was a motivator for participating online. This rate is higher among those who are unemployed (42%), compared to those who work full-time (35%), retired (34%) or are self-employed (30%).
- ▶ Audiences with a disability are more motivated to participate online for their own mental wellbeing (41%) than those without a disability (34%).
- ▶ In giving examples of why they decided to participate online, one person shared 'Feeling connected to the world at a time of enormous stress.'
- ▶ Some mentioned that they were motivated 'for sheer pleasure and self-indulgence' and 'for my spiritual expansion'.
- ▶ Others say that digital participation has helped with their mood, for example, 'I took online dance classes and learnt routines. The movement and creative output was really mood lifting.'
- ▶ Some have been motivated to grow their skill set by participating online. One said, 'To learn more, to have more skills for when the pandemic is over.'

They also feel that digital enables greater access

- ▶ One-third of audiences are participating online to see something they wouldn't normally be able to see (34%). One person shared, 'Ballet performances by Australian Ballet as I had been unable to get tickets when they were live.'
- ▶ Online arts and culture activities have also connected audiences with work in other States, for example: 'Seeing the Australian Dance Theatre Adapt streamed program. They barely come to Melbourne and having the opportunity of seeing their best performances now is amazing.'
- ▶ They are also connecting Australian audiences with international work, and vice versa. One person shared, 'The Metropolitan Opera of New York - being able to see something otherwise impossible due to distance, cost or timing.' Another said, 'I watched BTS's Bang Bang Con. It was memorable because I watched concert after concert that I never thought I'd be able to actually experience, especially considering they never tour in Australia.'
- ▶ Audiences with a disability are more likely to continue participating online after the pandemic is over (70%) than those without a disability (66%). One person with a disability said, 'Having a disability means I have actually increased some online/digital culture activities.'

Internet accessibility can be a key barrier to online participation

- ▶ People are experiencing a variety of barriers to engaging online, but most commonly people report that they either have other priorities for their time (34%) or generally don't know what is on offer (35%), suggesting there could be a role for greater investment in content discovery and digital marketing.
- ▶ For those with little time, some would like guidance in navigating digital offerings, for example: 'There is a LOT of content online right now. Time is precious, so it would be great to get help narrowing it down - Top 5 for example.'
- ▶ Regional/remote audiences are less likely to have participated online (67%) than metropolitan audiences (77%). When asked which barriers they have experienced, regional/remote audiences are more likely to say they need help figuring out how to access these programs (11%) than metropolitan audiences (9%).



- ▶ Internet connection can also be an issue for some when accessing digital work. One person said, 'NBN speed is unreliable. We are in an excellent speed level area, but it's highly affected how we experience online activities.' Another said, 'poor internet speeds'.
- ▶ One person also shared, 'I live regionally, and the internet connectivity is rubbish.' Another said that one barrier was 'Internet consistency in a rural area.'
- ▶ Among audiences with a disability, 9% found that online arts and culture content wasn't accessible for them to engage with, suggesting there is room to continue improving the accessibility of content online.

Free content is helping more people experience the arts

- ▶ When asked what was most memorable, many people mentioned that freely available content was enabling them to experience a broader range of arts activities than usual. For instance, one person said, 'I would never have the financial means (or child-free time!) to attend most things, so being able to access things at reduced cost/free at the moment is wonderful. Digital streaming also reaches a wider audience. I love that I can now see more shows/conferences/workshops etc living in Perth WA we miss out on many opportunities.'
- ▶ In addition, the decision by arts organisations to make content freely available, and/or by an optional donation, has been well-received by audiences. For instance, when asked what was most memorable about their engagement online, one person said, 'The availability of international experiences, things I wouldn't normally be expected to see, were freely available or available for a small cost. Having the choice to donate to a freely available artist's or organisation's work made me feel good.'
- ▶ Just 5% report that the digital offerings they've encountered are out of their price range. However, this is higher among under 35s (16%), people who rely on income as an artist (10%) and those that have experienced financial hardship since the pandemic (8%).
- ▶ One person commented, 'Cost's a barrier as I had been unemployed'. Another said, 'Income stream has dried up so paying to see performances hasn't been possible.'

There are different views about the quality of online experiences

- ▶ One person shared that their online experience was, in fact, an improvement from their live experience: '[...] because the camera was close to the artists which offered a closer and clearer view, compared to attending a concert in person.'
- ▶ However, others feel that online arts experiences don't offer the same value as live experiences. One person said, 'Watching online is not the same experience as watching 'live'. The experience of a 'live' show and the opportunity to 'go out' - 'me time' much more rewarding when not online.'
- ▶ Another shared that they would rather engage in other arts activities: 'It's just not the same as the live experience, I don't find it engaging. Would rather listen to my iPod or a CD, or watch a movie.'
- ▶ One person mentioned, 'As I have a disabled partner, I only find entertainment in visiting the venue of entertainment - not interested at all in anything online (that's not entertainment) that's a recording. We could watch TV for that stimulation.'
- ▶ Several people expressed that they haven't participated as they are experiencing screen fatigue, as one said, 'I work in front of a screen so don't want all my entertainment/arts in front of a screen.'

Audiences see opportunities to continue expanding and improving Australian content

- ▶ One person said they want to see more high quality local content: 'I find that good digital content is still quite rare, and there hasn't been much content of a high quality that I'm interested in engaging with on a local level.'
- ▶ When asked what is preventing them from participating online, one shared, 'No real barriers but too much stuff and a lot of it mediocre.'
- ▶ In terms of what constitutes quality, one person suggested, 'Online content can't simply reproduce/replicate what's done in person it needs to rethink what it delivers. Much greater effort needs to be made in Australia to digitise collections for access.'



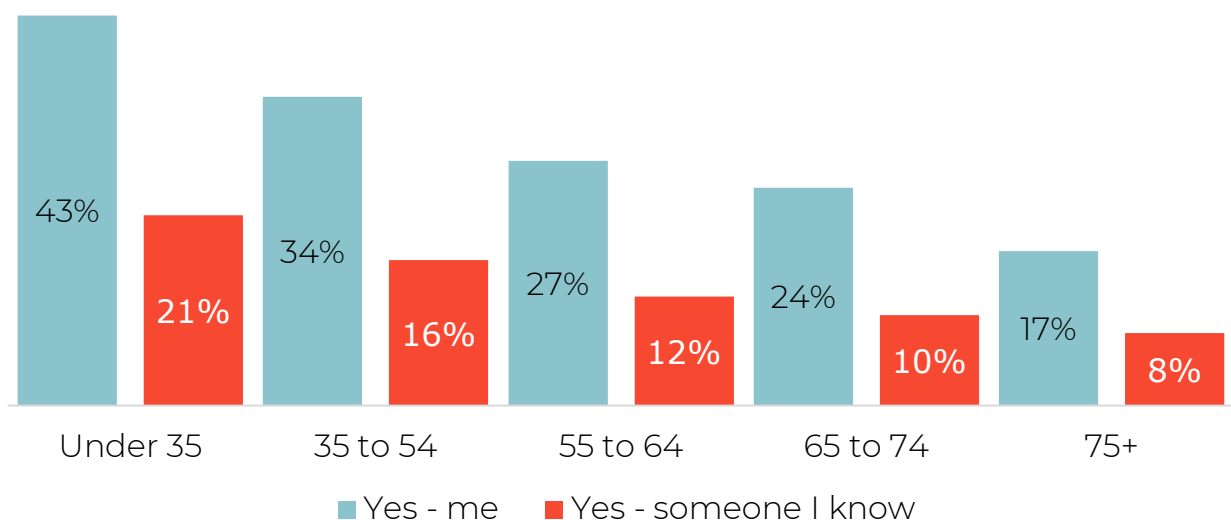
- ▶ Read on for more insight about what audiences are getting out of their experiences online and the factors that drive engagement.

Impact of digital engagement

Audiences are discovering new artists and works online

- ▶ Confirming the audience development potential of this time, a sizeable proportion (29%) have discovered a new artist, artwork or performance online, or they know someone who has (13%).
- ▶ One person shared ‘We have developed a collaborative music playlist with family members. Each day has a prompt and we each add a song to the list. It has increased our interactions with each other, the amount and variety of music we listen to and has prompted memories and stories.’
- ▶ Audiences under 35 are more likely to have discovered a new artist, artwork or performance online (43%) compared to those aged 65 to 74 (24%), and this rate is even lower for those aged 75 and over (17%).

Figure 1: In the past fortnight, have you, or has anyone you know, discovered a new artist, artwork or performance online? (Respondent could select multiple)
By age. n=6,156

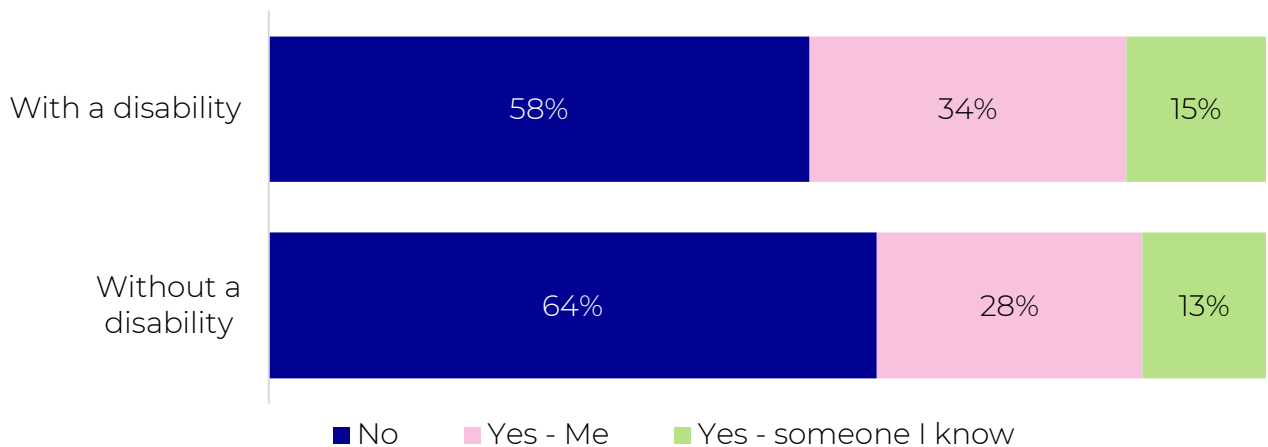


- ▶ Discovery of new work online is also higher among audiences of First Nations work (47%), compared to the average (29%).



- ▶ Online discovery of new work is also higher among respondents with a disability (34%) compared to those without a disability (28%).

Figure 2: In the past fortnight, have you, or has anyone you know, discovered a new artist, artwork or performance online? (select multiple) Disability Y/N. n=7,476



Digital content provides opportunities for creative participation

- ▶ More than one-third (36%) of audiences have participated in an online class, and 10% have created content to share online. One person shared that digital platforms have meant they can participate creatively from home in different ways, saying their most memorable experience during this time has been ‘Bollywood dance classes. I live too far away to be able to participate in normal circumstances. It was fun.’
- ▶ Some respondents who are practising artists shared that online participation has supported them in their practice. One said, ‘To meet my own expectations for maintaining a wide world view as an arts practitioner, which is difficult to achieve at the best of times.’
- ▶ Another commented that online platforms were the only opportunity to continue distributing their work, ‘I am a practising visual artist and it is the only way we can exhibit at this time, as actual galleries have closed.’
- ▶ Across artforms, people have felt connected to others through their online creative activities, for example: ‘DJing from my living room to a heap of friends, felt connected like I haven't in quite a while’. Another shared, ‘Participation in a virtual choir of >400 people from all around the world. Amazing sense of solidarity.’

Online products are enabling fans to share works with friends and family

- ▶ While just 16% of audiences were motivated towards online participation to share experiences with family and friends, several people offered examples of these experiences. For example, 'The spoken word poetry exploration was lovely because it was a rare thing I was able to enjoy with my teenage son. We also sent a link to my elderly parents who also enjoyed it.'
- ▶ Others see an opportunity to introduce their children to arts experiences. For example, one person said 'Performing arts are crazily expensive in Australia compared to Europe. I was able to share ballet performance with my teenage sons but would have never bought tickets for them. Now they might become interested.'
- ▶ Another shared that their most memorable online experience has been, 'Watching online theatre with my children. Getting to share works with them they were too young to see at the time the shows were on.'
- ▶ Some value the ability to engage from the comfort of home. One person said their most memorable experience was, 'Being able to sit together as a family at home on a cold, wet Saturday night and watch live Australian music.'

There has been more opportunity for discussion and interpretation

- ▶ When sharing memorable experiences they've enjoyed online, audiences say that online platforms provide an engaging medium for sharing, discussion and interpretation of digital work. For instance, one person shared, 'My friends have been suggesting theatre shows that are now online. We have an email group and send links and then talk about the shows in a chat room. We are loving the opportunity to see National Theatre productions from London.'
- ▶ Another shared an example of streamed performances fuelling discussion and interpretation of works: 'Watching The National Theatre production of Frankenstein – [where I was] able to watch two different actors play the same role - then discussing the production with friends online.'
- ▶ Public online forums can maximise an arts experience, for example: 'Participating in a Zoomed discussion on a particular performance of Verdi's Othello organised by WA Opera. [It was] memorable because there was a

rich diversity of views expressed and an opportunity to talk with an acclaimed operatic conductor about his personal experience of performing this work (Chris van Tuinen).'

Online arts have enabled people to transcend isolation

- ▶ Although participating in isolation, audiences who have engaged in online activities report achieving a sense of connection during the pandemic. When asked about memorable experiences, one person shared, 'The NGV Basquiat/Haring online tour. It was way better than expected, I had bought tickets to attend, and did it via Zoom with a friend/wine. It felt like we had escaped COVID for a brief few hours'. Another mentioned, 'A live-streamed comedy show was tone perfect for the times we are in.'
- ▶ Another person recalled, 'An album launch and performance from solo artist. The communal nature of it, knowing others are watching from home and having the artist address the current situation made it feel relevant and shared.'
- ▶ Global audiences for digital work also helps audiences to feel connected. One respondent shared their appreciation for, 'The social aspect of watching things online as a group'. Another agreed, 'So amazing to see an intimate performance live with other people around the world also watching. Actually kind of more enjoyable than watching in person!'

People value seeing artists up close and personal

- ▶ The unique opportunity to observe artists up close and personal in their work has been an invaluable experience for some. One person commented, 'Seeing Yo-Yo Ma play in his home and being so up close to him is magical.'
- ▶ Another agreed, 'The intimacy of seeing speakers up close, and often in their homes or local areas, was very interesting. I could hear and see speakers more easily than attending a venue. I felt comfortable because I was in my own home.'
- ▶ Some feel that online performances allow artists to present in a more 'real' way, compared with traditional settings. One respondent shared, 'It's very real and nice to see them not glammed up and just doing their craft.' Another agreed: 'Allan Harris live from his lounge room in Harlem - very memorable because, as well as being a wonderful performance, it was personal. He acknowledged the virus situation and reminded us that we will get through this together. It was like sitting in his living room with him.'

- ▶ However, one person's experience suggests that it may not work for all performers, '[the artist] was clearly uncomfortable performing to cameras with no audience. He mentioned it at the end. It brought home the unsatisfactory existence for all performers at the moment.'

A sense of 'liveness' can be achieved online in different ways

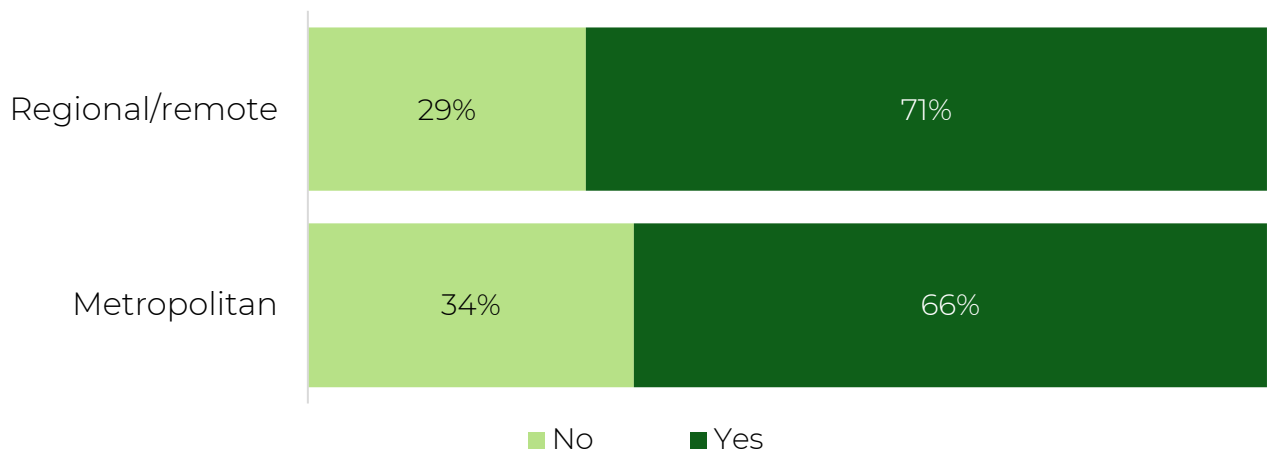
- ▶ While they are not in the same room as the performers, some audiences felt connected to them regardless. One person shared, 'Being able to still watch a past performance via online and still feel the energy exchange from performers to the audience was quite incredible. Simply hearing the breath of the dancers on stage helped me remember how truly special performance is and how much it can give to those in the audience regardless of how long ago it may have been presented live.'
- ▶ Another mentioned how a digital experience mimicked a live shared experience with others, 'I've been 'attending' a nightly piano bar that has been a wonderful shared experience, giving me a sense of community and lifting my spirits.'

Markets

Digital distribution will play a role beyond the pandemic

- ▶ Among those who are participating online more frequently than they used to, most (67%) think they will continue doing so when the pandemic is over, suggesting there will be a long-term role for digital distribution of cultural content.
- ▶ There is opportunity to present digital offerings for regional/remote audiences post-pandemic. While they are slightly less likely to be participating online, as noted above, regional/remote audiences are more likely to continue doing online arts and culture activities after the pandemic ends (71%), compared with metropolitan audiences (66%).

Figure 3: Do you plan to continue doing these online arts and cultural activities more frequently, after the pandemic ends? (By region type of the organisation distributing the survey) n=2,707



- ▶ The intention to continue participating online is also high among people with a disability (70%), those who are caregivers to older adults (70%) and parents of children aged under six (68%).
- ▶ One person shared: 'I have severe social phobia so attending in person is often impossible for me. The wealth of online activities around the world has made arts and culture so much more accessible to me. It's wonderful.'
- ▶ Some people say that after the pandemic, they would like a choice of attending in-person or watching a livestream (35%). Again, people who live with a disability are more likely to want this option available (44%), confirming the role for digital in expanding access to the arts.

Markets for digital work could be developed further

- ▶ Most audiences engaging online say they have not paid for any online arts or culture experiences in the past fortnight (66%), though a significant minority have (34%).
- ▶ People under 35 are more likely to have paid for an online experience (41%) compared to the national average (34%) and compared to people over 65 (31%) and over 75 (28%).
- ▶ Respondents who are retired are less likely to have paid for an online arts experience recently (29%), compared with those who work full-time (37%) or are self-employed (40%).

- ▶ Over two-thirds say they are at least somewhat likely to pay a small amount for access to digital programs in future (68%). This is higher among those who attend performing arts more than once a week (77%), under 35s (77%) and parents or caregivers (71%).
- ▶ Among those that have paid for an online arts experience, a sizeable proportion has spent more than \$50 in the past fortnight (36%). Despite being less likely to pay for an experience, audiences over 75 years who have paid are spending the most (49% have spent over \$50), while under 35s have spent the least (19% have spent over \$50).

Some locations are more engaged online than others

- ▶ Among the States and Territories those with the most engaged online audiences are the Australian Capital Territory (ACT) (80%), Victoria (VIC) (79%), New South Wales (NSW) (78%) and South Australia (SA) (74%).
- ▶ By comparison, other States have an opportunity to develop their online audience markets further: among the least engaged online are audiences in the Northern Territory (NT) (65%), Queensland (QLD) (71%), Tasmania (TAS) (71%) and Western Australia (WA) (72%).
- ▶ At this point, the most common form of payment has been via donation, with smaller proportions paying for a single online pay-per-view event or purchasing an ongoing subscription for an arts platform. However, these rates could change as the pandemic goes on, and will be measures to watch closely in future data collection phases of this study, planned for July and September 2020.
- ▶ Metropolitan audiences are more likely to have paid for online arts and culture experiences than regional/remote audiences (35% and 26% respectively).
- ▶ Metropolitan audiences are also spending more on online experiences than regional/remote audiences. For metropolitan audiences, 37% have spent more than \$50, compared with 30% for regional/remote audiences.
- ▶ In regard to receiving communications from organisations, audiences who have spent more than \$50 for online arts and culture are more likely to be seeking updates from artists and other creatives associated with the organisation (39%), compared to those who have spent less than \$10 (31%).

Digital participation could translate to patronage after the pandemic

- ▶ There are signs that digital participation could translate to attendance at live events after the pandemic. For instance, one person said, 'Pre-recorded content has made me revisit arts organisations (i.e. The Australian Ballet) which I hadn't engaged with in years. It would make me more likely to attend a performance of the Australian Ballet in the future when I'm able to.'
- ▶ Another person felt encouraged to attend a real-life tour following a virtual one: 'QAGOMA Mavis Ngallametta exhibition - virtual tour through the gallery. Memorable: because of the mix of wide and close-up shots - and because it made me long to see them in the gallery.'
- ▶ Some people shared that discovery of a new artist had led them to make purchases as a result. One person shared, 'Watching Delivered live and seeing a new artist Vera Blue, I would have never listened to before and have since bought her album.'
- ▶ These examples confirm the ability for online experiences to act as a catalyst for deeper engagement. There may be more opportunities to connect digital audiences with paid offers and convert attention into sustainable revenue streams.



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 artforms and 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
Council
for the Arts



CREATIVE VICTORIA



Department of
Local Government, Sport
and Cultural Industries



Government of South Australia
Department of the Premier
and Cabinet



Queensland
Government