MARCH 2021

Audience Outlook Monitor

Australia Snapshot Report

AUDIENCE OUTLOOK MONITOR

PATTERNMAKERS

MARCH 2021

Live attendance outlook

Key findings
Audience Outlook Monitor, Australia

13,836
audience members responding

130
organisations across Australia

71% up from 29% in September 2020
have attended a cultural venue or event recently

80% up from 44% in September 2020
are making firm plans to attend a cultural venue or event

54% up from 24% in September 2020
of those attending have spent over $50 on tickets in the past fortnight

85%
feel comfortable at a venue with 75% seating capacity

30% up from 16% in September 2020
say that in the next year they won't spend as much as they did pre-pandemic

78% up from 72% in September 2020
say that long-term they will attend just as they used to in the past

94%
of audiences are likely to get vaccinated for COVID-19

9 in 10
are confident vaccination will help Australia return to normal within 12 months

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Online engagement

Key findings
Audience Outlook Monitor, Australia

47% down from 70% in September 2020
are experiencing art and culture online

55%
are relying on email marketing to find content

47% down from 54% in September 2020
are engaging online more frequently during the pandemic

66% down from 74% in September 2020
of those engaging more plan to continue, post-pandemic

37% stable with 39% in September 2020
have paid for an experience online recently

41% up from 35% in September 2020
of those paying have spent more than $50

27% up from 22% in May 2020
are not experiencing barriers to engaging online

64%
find it appealing when online experiences are available on-demand

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Summary

7 in 10 audiences are now attending in-person and ticket sales are increasing

The March 2021 results of the Audience Outlook Monitor point to a resurgence of arts and cultural attendance across the country.

Thanks to increasing numbers of events and outdoor programming over summer, 71% say they have recently attended a cultural venue or event of some kind and 80% are making plans to attend in future. Audiences are also spending more on tickets compared with September 2020 and many have purchased a subscription or membership.

Restrictions and the risk of lockdowns are affecting audience behaviour

After months of very low infection rates, confidence is growing stronger, though outbreaks have an immediate impact on behaviour. When asked about barriers to attending, the number one thing inhibiting attendance is no longer the risk of contracting or transmitting the virus (26%), but the risk of lockdowns and cancelled events (37%).

These risks are affecting spending, with people most commonly booking tickets 2–3 weeks in advance. A sizeable number say that their spending levels won't be as high as they were pre-pandemic.

Ensuring that ticketing and cancellation policies are well-communicated will be essential for helping audiences make plans and feel confident to spend larger amounts.

COVID-safe guidelines are critical to confidence – particularly social distancing

Those who have attended recently are largely satisfied with COVID-safety during their experience and a majority are at least somewhat comfortable to attend most kinds of cultural venues. However, mask-wearing remains slightly contentious and while more people feel comfortable to attend when face masks are mandatory, some report that it affects their experience and would opt for activities that don't require one.

When presented with a list of options for attending an event, most audiences selected an indoor venue with fixed seating (44%) as their preferred choice, as the weather starts to limit outdoor events. Along with check-in procedures and disinfection, social distancing is important to audiences and venue capacity restrictions feature prominently in audiences' perceptions of safety.

Some people report discomfort where social distancing is not observed by audiences once inside cultural venues. For every three people who are comfortable at a concert arena, there is one who isn't, and the challenge is to ensure those unconcerned are considerate of those with a lower risk tolerance.

Online participation has decreased — though there is an enduring market for premium content

Around 1 in 10 (9%) say a digital program would be their first choice at this time – though overall participation in online arts experiences has fallen since September 2020 (47% have participated recently, down from 70%).

There is strong appeal for content that is available on-demand, with 64% ranking this type of access as an appealing feature when accessing online experiences, though live-streamed experiences are also attractive (37%).

While some audiences say they have grown fatigued of 'screen-time' or aren't interested in digital programs (27%), more than one-third (37%) of those online continue to pay for content and proportionally more are spending over $100. Strategic investment to continue improving the value offered by digital experiences will help sustain engagement with key segments online.

Strategic programming and thoughtful communication are key to rebuilding audiences

Looking ahead to the rest of 2021, the outlook is positive, with 94% of audiences planning to get vaccinated, and most (90%) at least somewhat confident that the vaccination roll out will help things return to normal within 12 months.

As winter approaches, and events return indoors, considerate and creative approaches to restrictions will help attract the largest possible audience. It may also be appropriate to offer events with different models to suit different audience segments. Alongside strategic programming, effective communication of COVID-safe policies and what they mean for the audience experience will help to further improve confidence.

Introduction

This report summarises insights from over 13,800 audience members

This Snapshot Report outlines key findings from the March 2021 phase of the Audience Outlook Monitor in Australia (Phase 4), based on 13,836 respondents. Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations, and festivals. On 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

In addition to this Snapshot Report, the March 2021 results are freely accessible in an interactive dashboard. Users can explore the data for all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19

Read on for the key March 2021 findings nationally.

Current conditions

A majority of Australians are comfortable in public places right now

After a sustained period of very low numbers of COVID-19 cases, Australian audiences are now largely comfortable interacting in public and visiting a wide range of places.

Compared to September 2020, a larger proportion of audiences now feel comfortable eating at a local restaurant (98%, up from 85%), using public transport (85%, up from 62%) and even flying domestically on a commercial airline (69%, up from 48%).

Comfort levels are also higher with activities such as exercising at a local gym (72%, up from 53%) and attending a sporting match (82%, up from 64%). States and territories where audiences are most comfortable continue to be the Northern Territory (NT), South Australia (SA), Queensland (QLD) and Western Australia (WA).

By comparison, audiences in New South Wales (NSW), Victoria (VIC), Tasmania (TAS) and the Australian Capital Territory (ACT) are demonstrating slightly more caution with public activities.

Attending cultural events

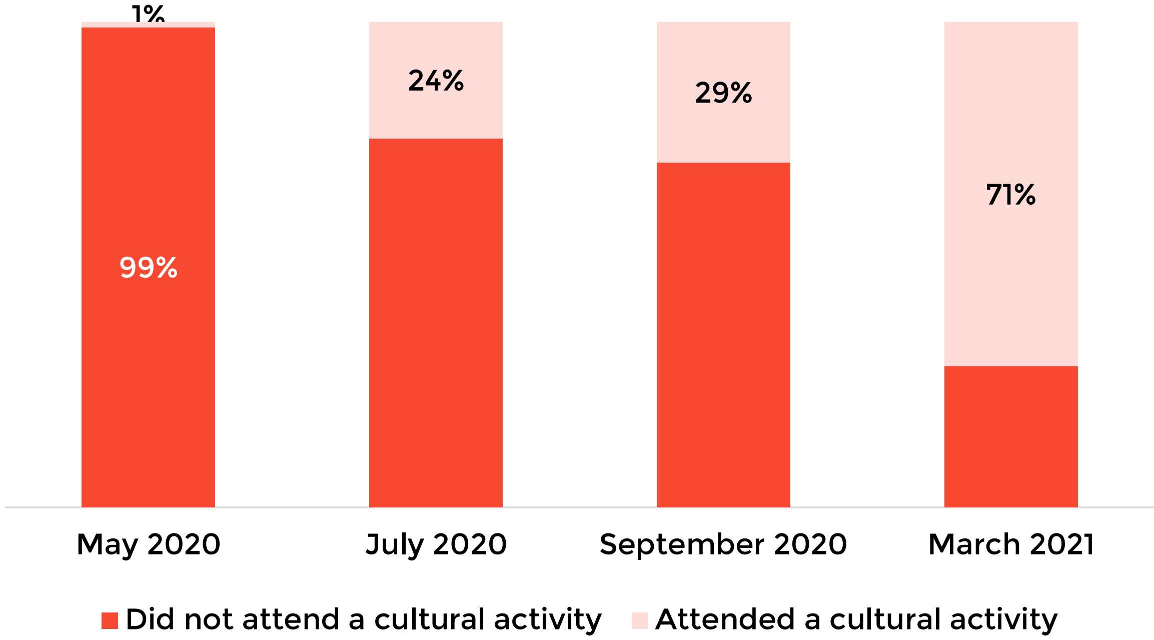
Nationally, live attendance rates have more than doubled since September

Attendance at live arts and cultural events is increasing, as venues and facilities continue to reopen in accordance with COVID-safe regulations in each state and territory. In March 2021, 71% of audiences attended a cultural activity in-person within the fortnight before data collection, compared with 29% in September 2020.

Within the study's sample, two-fifths (41%) of audiences said they recently attended a live performance – a significant increase since September when most performance venues were still closed (8%).

Participation in other cultural activities has also increased, including attending a cinema (31%, up from 13%), visiting a museum or gallery (29%, up from 13%), attending a fair or festival (13%, up from 3%), or going to a lecture, artist talk or workshop (16%, up from 7%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? n=13,836



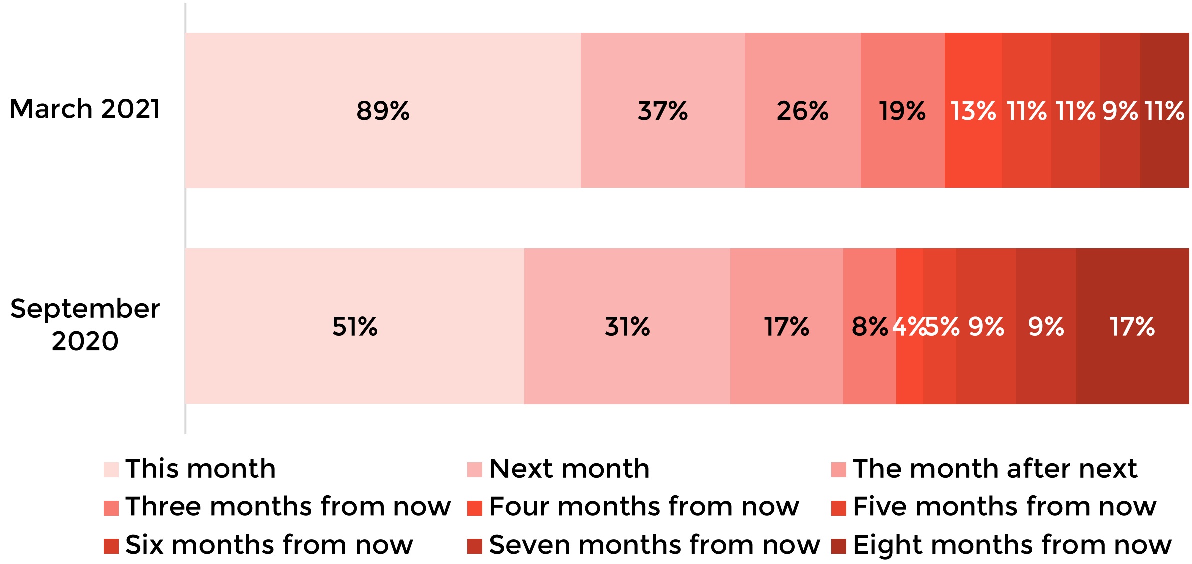
8 in 10 are making plans to attend in future, commonly booking 2–3 weeks in advance

Audiences are signalling greater confidence in attending events in the near future. In the past two weeks, 8 in 10 (80%) said they made firm plans to attend an event in future, with most planning to attend a live performance (57%), a museum or gallery (35%) or a cinema (35%).

However, audiences are still exhibiting a degree of caution by purchasing tickets with shorter lead times compared with pre-pandemic times. The greatest proportion of audiences are purchasing tickets for events in the month ahead – either in the next seven days (33%) or later in March (56%) – while a significant number are purchasing tickets for April (37%). One audience member shared:

> 'Not keen to book too far in advance and certainly not interstate at the moment due to possible lockdowns, hot spots and border closures.'

Figure 2: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (select multiple)
n=5,284



For 1 in 4 audience members, concerns about virus transmission continue to inhibit attendance

Health risks and financial barriers continue to play a part in audience decision-making – though these pressures are lessening.

Over the past six months, the proportion of audiences who know of someone within their social network who has been sick with the virus has been stable (at 6%) and the proportion experiencing financial hardship as a result of the pandemic has dropped from 34% to 25%.

However, a proportion say that the risk of virus transmission prevents them from attending as they did in the past (26%) and 2% cannot foresee going out until there is no risk at all. Some people explained,

> ‘While the venue and [I] adhere to the social distancing aspects of life nowadays, there are many participants who do not, either wilfully or carelessly.’

> ‘Husband is health compromised. Couldn't risk bringing anything home. I shall return to my past passions once we are both vaccinated.’

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The main factor inhibiting attendance right now is the risk of lockdown and cancellations

When asked about the factors preventing audiences from attending right now, the top factor selected was the risk of lockdowns and cancelled events (37%). One person shared,

> 'Seriously just tired of things being cancelled. We have had no cases in our area for about 9 months now and still things are not being run.'

Restrictions and COVID-safe arrangements are also limiting attendance, with some audiences indicating that there are not as many options available (25%), that events are booking out too quickly (16%) and/or that the quality of the experience has changed (9%).

Attendees are spending more, though overall spending is not likely to fully recover this year

Over half (54%) of those attending in the past fortnight said they spent more than $50 on tickets, and 31% spent more than 100%. This represents a significant increase on levels seen in September, when 24% spent more than $50 and 11% spent more than 100%.

However, over the next 12 months, 30% of all audiences say they expect their overall spending on arts & culture tickets, admissions, subscriptions and memberships to be lower than before the health crisis started.

Comfort levels

A majority of audience members now feel comfortable with most types of cultural venues

While comfort levels with most venue types was relatively high in September 2020, audience confidence is continuing to grow. Comfort levels have increased for indoor venues such as museums and galleries (98% are at least somewhat comfortable, up from 93%), community art spaces/studios (96%, up from 87%) and large theatres or concert halls (91%, up from 67%).

Confidence has also increased for venues that audiences were previously more cautious of, including stadiums or arenas (76% are somewhat or very comfortable, up from 53%) and comedy clubs or live music venues (56%, up from 37%).

More people are now at least somewhat comfortable with interactive exhibitions (57%), which has seen the most significant increase since July (33%) and September (34%).

By limiting seating capacity, venues may reach more audience members

While most audiences now feel relatively comfortable attending most indoor venue types, limits on attendance numbers are an important factor.

Reduced seating capacities appear to encourage people's perceptions of safety, for instance:

- Almost everyone (96%) feels at least somewhat comfortable at 50% seating capacity
- Most people (85%) feel comfortable with 75% seating capacity
- Around half (49%) feel comfortable with 100% seating capacity inside venues.

As public health guidelines are gradually relaxed, there may still be a case for some venues to voluntarily impose capacity limits for certain events, as it would allow them to be accessible to almost twice the number of audience members.

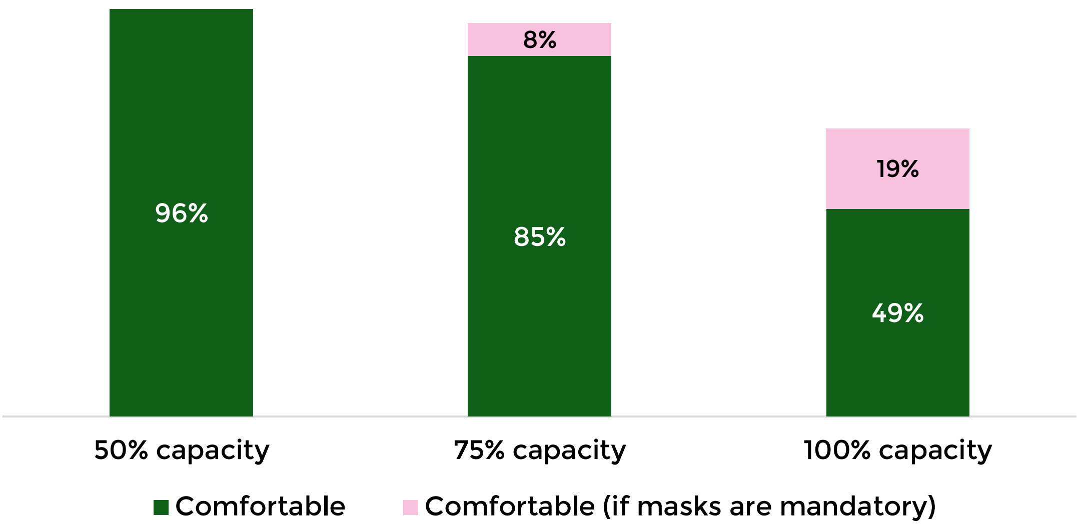
More people are comfortable to attend if masks are mandatory, though some prefer activities that don't require them

Those who said they were not comfortable at venues were asked whether their answer would change if mask-wearing was mandatory.

At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (8% would be very comfortable and 47% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 85% to 93%.

At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (5% would be very comfortable and 32% would be somewhat comfortable) – meaning the overall proportion of audiences comfortable at this capacity rises from 49% to 68%

Figure 3: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) n=13,355



However, the qualitative data suggests the situation is complex. One person said, 'I am happy to wear masks if this makes more events possible.' Another said, in relation to a recent experience attending an event with a mask:

> 'I felt very safe albeit wearing a mask was uncomfortable, which is why I [would go for] open amphitheatres as my first preference... Based upon what I've heard this is the safest option if you do not wish to wear a mask.'

The combination of capacity limits, social distancing and mask-wearing is confusing for some

With face mask policies, settings, capacity and social distancing all affecting peoples' choices to attend events, the situation is complex.

Beyond following guidelines, arts organisations should consider adjusting these conditions as a part of their programming decisions – and where appropriate consider offering events with different models to suit different segments of their audience.

It's also important to clearly communicate what these policies mean, with some audience members sharing their confusion at how capacity and distancing rules are applied in practice. For instance, one said,

> 'The social distancing rules are inconsistent with the capacity rules - I see whole rows and sections of rows empty at theatres - but I am

> seated next to, in front of and behind people with whom I did not attend.'

Comfort with square-metre regulations has increased, but some audiences don't see any benefit

Since September 2020, the proportion who feel comfortable attending venues with social distancing measures in place has grown. Now, more people are at least somewhat comfortable with 2 square metres (89%, up from 68%) and 4 square metres (96%, up from 92%) of space for each person.

However, similarly to capacity restrictions, comfort is only improved when the regulations are properly implemented by venue staff, as one said,

> 'I have found that [there are] overall requirements of number of people for the space, but then audience members are allowed to sit anywhere, meaning the 1.5m space is not maintained. If this is to be allowed, we may as well return to usual.'

The proportion who are now very comfortable with no social distancing regulations has increased only slightly, from 4% in September 2020 to 14% in March 2021, confirming the need for social distancing guidelines to remain in place for now – and for organisations to look at ways to encourage observance of guidelines inside venues.

Creative approaches to seating can help more people feel comfortable and engaged

One of the common themes in audiences responses about recent events is atmosphere. Social distancing has presented a challenge for creating a buzzing atmosphere, as one person explained,

> 'Audience is an integral part of the experience...the more space there is, the less the energy.'

Events that find ways to create a great 'vibe', whilst observing guidelines, will be highly attractive to audiences.

Some audiences like events with 'pods' or tables of 4–6 people (17%) where they can sit close to people in their immediate social circle. For instance, one person said,

> 'I like the idea of being able to sit closer with people I know or live with, especially if I know they are taking care.'

However, this model doesn't work for everyone with another person reporting, 'Difficulty in organising 4–6 people for pods before they sell out.'

Comfort is highest at outdoor venues, which may impact attendance as winter approaches

Over summer, many audiences enjoyed outdoor events, as one person said,

> '[I've enjoyed outdoor events] especially after months of being inside and [because] it's easier to keep distanced from other people.'

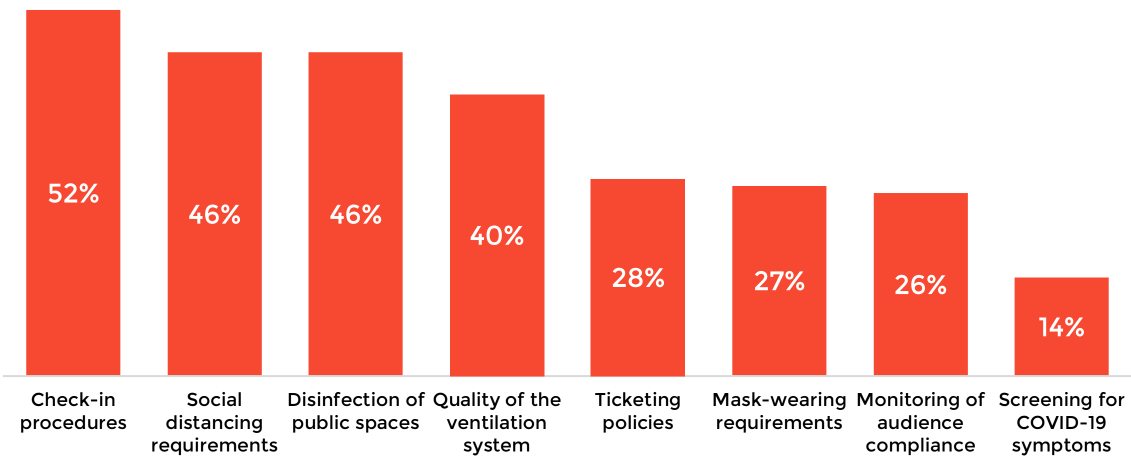
As winter approaches, audiences are concerned about the weather affecting outdoor events, but are also concerned about the potential for transmission of the virus in indoor venues.

One key issue appears to be the air conditioning and lack of fresh air circulation, and many audiences (40%) said this topic is important in communication about venue safety. As one said,

> 'Outdoor venues seem preferable to indoor venues where air conditioning is likely to be a factor and where there is no/limited circulation of fresh air.'

To feel reassured about safety regulations, the other most common topics audiences are interested in hearing about are check-in procedures for contact tracing (52%), social distancing requirements (46%) and disinfection of public spaces (46%).

Figure 4: In thinking about attending cultural venues and events, which of the following topics are most important to you? (select up to three) n=6,031



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COVID-19 safety

There continues to be a wide range of views about public health policies

Qualitative comments from audience members reveal views right across the spectrum.

Some people remain highly cautious and want COVID-safe procedures in place long-term, while others say the social distancing arrangements deter them from attending. For example, one person said,

> 'Some popular events still are not managed as strictly as they should be. I won't feel comfortable until the bulk of the population has been vaccinated and as long as COVID-safe procedures remain in place for the long term.'

Another said,

> 'I am sick to death of COVID restrictions... It is not ok, or normal, for society to be distorted like this... Give me crowds and danger, or I will stay home.'

Most audiences are satisfied with COVID-safety at cultural venues

When recent attendees were asked how satisfied they are with audience safety at the venue(s) they attended, the vast majority are satisfied.

Looking at specific aspects of COVID-safety plans, there are some slight differences relevant to different venue types. For instance:

- At cinemas, communication of COVID-safe practices was rated least well on average and limits on capacity had the highest satisfaction
- At live shows and performances, physical distancing measures rated least well, presence of check-in procedures had the highest satisfaction
- At fairs and festivals, physical distancing measures rated below other areas.

Staff and signage continue to be important ways to reassure audiences

Audiences who are cautious about attending continue to make suggestions for improving communication of COVID-safe arrangements, and in particular signage on-site. One suggested,

> 'At the booking stage, and at the entry to the auditorium, it would be useful if information on the COVID-safe procedures for the venue were evident.'

Audiences generally also appreciate clear instructions from staff – and some believe there is a case for a stronger staff presence at some events. One person shared,

> 'There should be more staff (if possible) and signage to make the general public adhere to current rules and regulations relating to COVID. Most people are aware and keep to the restrictions but there are the 5–10% who just do not get it.'

Longer-term outlook

94% of audiences say they are likely to get vaccinated, which is likely to further improve confidence

The commencement of Australia's vaccination program is already contributing to confidence levels and the outlook is positive. One person said,

> 'Now that quarantine workers are getting vaccinated the risk of further outbreaks is greatly reduced. I feel quite safe attending live events.'

Almost all respondents (94%) said they are likely to get vaccinated, and most audiences do not have major concerns about issues like the effectiveness of the vaccine.

Looking ahead, the vast majority (90%) feel confident that the vaccination effort will lead to the resumption of normal activities within 12 months. And more than three-quarters (78%) of audiences say that long-term, they expect to attend just as they used to in the past.

A small proportion say they won't get vaccinated – but their participation behaviour is unlikely to be affected

Audiences who say they are not likely to get vaccinated (6%) are largely unworried about the virus. Only 8% of those who said they will definitely not get vaccinated say that the risk of transmission is inhibiting their attendance.

Two-thirds (67%) of this group attended a cultural activity in the past fortnight, which is similar to the national average.

This group is among the most optimistic about their attendance and spending on arts and culture long-term. A higher proportion of those who say they won't get vaccinated expect to attend more than before (9%), compared to those who will get vaccinated (5%). This group is also more likely to be spending the same amount or more in future (78%), compared to those who will get vaccinated (70%).

Support and fundraising

More audience members are committed to supporting the arts

Compared to attitudes in the early stages of the pandemic (May 2020), audiences are now demonstrating stronger feelings of support for artists and arts organisations.

The proportion who said they feel strongly committed to supporting arts and cultural organisations has grown from 37% to 44% since May 2020.

Audience likelihood to engage in various forms of support is relatively consistent with May 2020.

More audiences say they're likely to purchase a subscription or membership, even if some of the events might be cancelled (64%, up from 55% in May 2020).

Likelihood to make a donation to an organisation (68%, stable) or sector support fund (52%, stable with 51% in May) is stable, as is the likelihood to buy ticket vouchers (67%, stable with 69% in May).

Audiences continue to subscribe in 2021 to show their support

This year, 45% of audience members say they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season. This is relatively stable with the proportion who reported having subscribed to last year's season (43% were subscribed in September 2020).

Among those who have purchased, 90% say they are planning to renew next year, which is an increase since July 2020 (when 71% had planned to).

A majority of audience members purchased a performing arts organisation subscription (34%), while fewer purchased a museum or gallery pass (14%) or a subscription to another type of organisation (9%).

Donating to artists and cultural organisations is stable, and most want to support those facing adversity

The proportion of audiences making donations to artists or cultural organisations in the 2020/21 financial year (29%) is consistent with 2019/20 financial year (28%).

When asked what specifically prompted their donation, several people explained that they wanted to support artists and organisations that were struggling. One said,

> 'My 3 friends and I had already paid for our subscriptions and opted to donate the ticket costs when the performances were cancelled. The theatres still had costs, the performers had no income - the whole sector was totally let down - no government support at all. We thought that was appalling!'

More insight into donation behaviour and motivation will be published in a dedicated Fact Sheet in April 2021.

Online participation

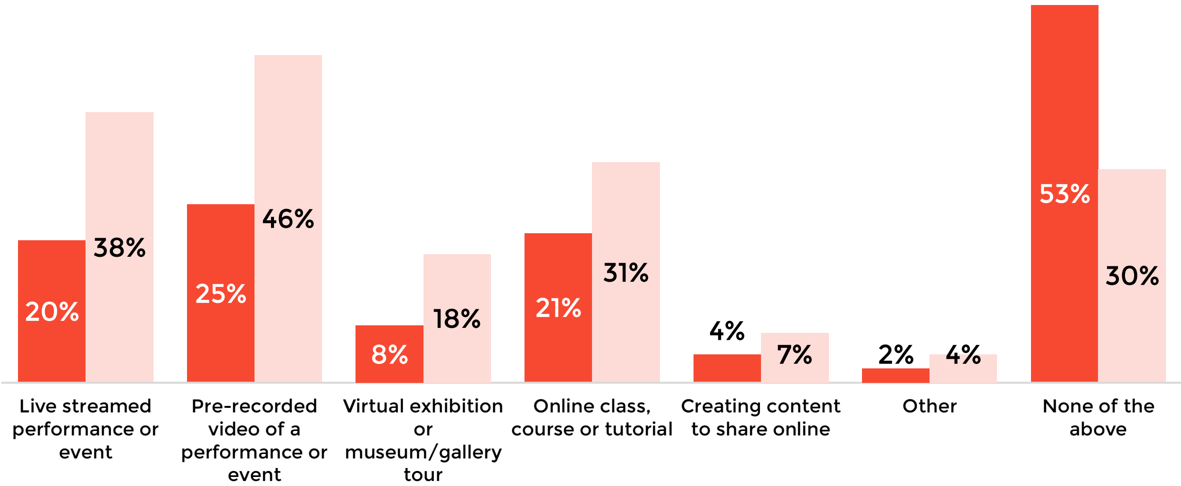
Nearly half of all audiences continue to participate online, and many plan to continue

As more people return to live events, fewer audiences say they recently participated in digital arts experiences such as live streamed events and virtual tours.

Nationally, the proportion participating online in the two weeks before data collection is 47%, compared to 70% in September 2020. The rate of participation varies around the country, from 41% in WA to 52% in VIC.

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

Figure 5: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) n=25,847



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

Video content of performances and events remains the most common form of digital participation, with 20% watching a live stream and 25% watching pre-recorded video recently.

However, online classes and tutorials have had the smallest decreases in attendance and are now a comparatively common way audiences are choosing to participate online (21%).

Audience members under 35 (50%) are just as likely to be participating online as audiences over 75 (50%), however there are some interesting age trends in terms of the type of engagement. Under 35s are the most likely to be taking online classes and courses (30%) and creating content to share online (12%), while those over 75 are most likely to be watching pre-recorded videos of events (31%).

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

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

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

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

However, a significant proportion are still motivated to go online to support an artist or organisation they think is important (30% compared to 38% in May 2020) and some are still going online for their wellbeing (20%).

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

The data shows that live and digital attendance are linked. For instance, those who have recently attended a performance in person are also more likely to be participating online (51% compared to 47% nationally), as both behaviours are driven by audiences' strong engagement with arts and culture.

Some audiences see a role for digital experiences in their lives long-term, while others see it as their preferred option where physical attendance is limited. For instance, one person explained they have difficulties finding others to go with, saying, '[I] prefer streaming at home than going out, unless I have friends who want to go as well.' Another said:

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

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

Since this study first measured the barriers to online participation in May 2020, the proportion of people who say they're 'not interested in online or digital arts experiences' has risen from 16% to 27%. Just 9% would select a digital program as their first choice for attending a cultural event today.

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

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

Another commented,

> 'Watching digitally from home just leaves me cold, and I want to spend less time in front of a screen.'

There may be opportunities to grow creative technologies that are more immersive (e.g. virtual reality) or that do not involve screens (e.g. audio experiences).

Audiences tune in on a wide range of devices – but some encounter technical issues

Those who had recently watched a live streamed event were asked how they watched the stream – and the results are varied. Laptop (36%) and desktop computer (34%) were the most common. Many audiences are using their television (29%), while mobile (13%) and tablet (10%) are less common.

All audiences were asked if they experience barriers in accessing online programs, and some reported technical difficulties. 5% say they don't have the right technology and 9% say they need help figuring out how to access online programs.

Suggestions for how to overcome technical barriers included 'always provide telephone assistance' and 'when the event is promoted - a how to access [should also be] listed.'

More than a third of users continue to pay for digital experiences – and they are spending more

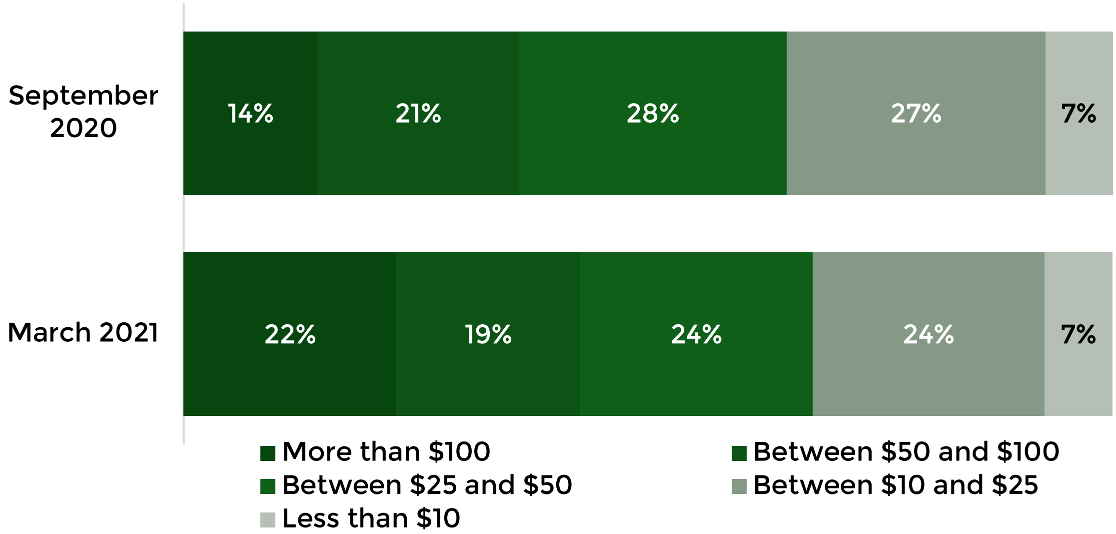
The proportion of users paying for content is now 37%, comparable to levels seen in September 2020 (39%), pointing to an enduring market for premium digital experiences.

However, the types of payment for digital experiences are changing, with slightly fewer people making a donation for something they consumed (13% compared to 20% in September).

Pay-per-view remains the most common form of digital patronage (19% relative to 21% in September). A small number (6%) say they subscribed to a platform to access content on-demand, and 8% say they accessed digital content as a part of a program/season they subscribed to.

The proportion of paying audiences who are spending large amounts has increased: 22% spent more than $100 in the past fortnight and a further 19% spent between $50 and $100 (compared with 14% and 21% in September, respectively).

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? n=3,644



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

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

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

The ability to access something on-demand was the most popular choice (64%), ranked higher than seeing something live that is happening right now (37%). Another popular feature was hearing the artist or artistic leader talk about their work (39%).

Accessing short, edited segments or taster experiences was in the top two features for 15% of audiences, and 13% selected tips on how to improve your own skills or appreciation of an artform. Smaller numbers preferred connecting with other audience members during the experience (5%) or contributing to the experience themselves (3%).

People rely heavily on direct email marketing to find out what's available online

When asked about how they found out about their recent online experiences, the largest proportion said they received an email from an artist or cultural organisation (55%). Many others said they were recommended the activity by someone they know personally (34%), or it appeared in their social media 'feed' (32%).

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

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

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

What's next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19

There, you can read about the story so far and access a dynamic dashboard, to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

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

Acknowledgment

Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land – Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present and emerging.

Made possible with support from

Australian Government

Australia Council for the Arts

Queensland Government

ACT Government

CREATIVE VICTORIA

Government of Western Australia

Department of Local Government, Sport and Cultural Industries

Government of South Australia

Department of the Premier and Cabinet

NSW Government