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wolfbrown

Audience Outlook Monitor

Digital Engagement Outlook

March 2022

Australian Government

Australia Council for the Arts

Key Facts: March 2022

Digital Engagement

-6%
decline in % of audiences participating in online experiences since Nov 21

34%
of those online paid for an experience in the past fortnight

44%
of those paying spent $50 or more in the last fortnight

20%
are doing online courses and similar numbers are watching pre-recorded video (20%)

Key segments

26%
are ‘digital devotees’: they see a substantial role for digital in their lives

28%
are ’tired of tech’: they see no role for digital arts and culture in their lives

47%
are ‘selective but supportive’: they see a small role for digital in their lives

Key findings: March 2022

Online participation has declined slightly as audiences begin 'living with COVID', but 7 in 10 say they'll continue to engage

- In March 2022, 4 in 10 (42%) audience members participated in online arts and cultural activities in the past fortnight. This rate is slightly lower than November 2021 (48%), which marked the end of extended lockdowns in Australia's eastern states.
- Audiences in states/territories affected by 2021 outbreaks continue to be the most likely to be participating online, such as those in NSW (45%), VIC (52%) and the ACT (45%). However overall, audiences around Australia are becoming more similar in their online behaviour, as restrictions ease, COVID-safety policies nationalise and people adjust their lifestyles to 'living with the virus'.
- At a national level, the proportion paying for online experiences in March 2022 (34%) has declined slightly since November 2021 (38%).
- Among those paying for digital experiences, spending levels are consistent with previous phases — providing a steady outlook for marketing digital offerings this year. 4 in 10 (44%) are spending $50 or more on online experiences (stable with 43% in November and 44% in July 2021).
- Despite the slight decline in online participation, a high proportion of audiences (73%) continue to see a role for digital in their lives, consistent with November 2021.

In the ‘post-lockdown’ era, three groups persist for digital arts experiences

- Cultural organisations can expect a digital market to endure throughout 2022 and beyond. Australian audiences are still conscious of the risks and impact of contracting COVID – and 4 in 10 say they’ll only attend physical events when the risks are minimal.
- Three key segments continue to appear in the data: ‘digital devotees,’ the 26% of audiences who see a substantial role for digital in their lives, ‘tired of tech’ audiences, the 28% of audiences who see no role at all outside of lockdown periods and ‘selective but supportive’ audiences, the 47% who see a small role.
- Digital events continue to provide a safe and convenient way to enjoy arts and culture – particularly when relaxed restrictions lead to uncertainty surrounding the virus circulating in the community.
- Audiences who are ‘selective but supportive’ are likely to respond well to hybrid models of digital offerings, which can provide flexibility for those facing barriers related to physical access, geographical location, lifestyle changes and time constraints.
- Quality is key for ‘digital devotees’ and premium offerings will resonate with this committed cohort.
- As conditions stabilise following the Omicron wave, the data suggests that a portion of the market may be unlikely to return to in-person events long-term, cementing challenges for pre-pandemic business models.
- There is a need to continue innovating with digital offers and targeting experiences and communication strategies at key segments. The findings also underscore the need to build sustainable practices around digital experiences, fit for the new era.

Introduction

Since March 2020, Australian arts audiences experienced significant disruptions to in-person cultural activities. With many having experienced periods of lockdown, and others facing the uncertainty of new variants, some remain cautious about live attendance.

Arts organisations have responded to the challenges of the pandemic by delivering digital experiences, such as live-streamed events and online courses. They are experimenting with digital technologies such as virtual reality and non-fungible tokens (NFTs). A range of innovative digitally-mediated products are also becoming available, such as audio-only experiences (e.g., AudioPlay for families) and Hybrid Museum Experiences.

This fact sheet looks at data from the Audience Outlook Monitor to examine the trends in digital participation in March 2022. As we move into the next chapter of the pandemic, it is likely that opportunities to participate online will continue to grow, as further innovation and product development takes places in the coming years.

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

In addition to this Fact Sheet, the March 2022 results are accessible in a free interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia.

To access state/territory-based findings about online participation, or for more information about the study, visit: www.thepatternmakers.com.au/covid19.

Online participation

4 in 10 audience members are participating in online arts and culture

The March 2022 results show that participation in online arts and cultural activities has declined overall, as the country moves into the post-vaccination phase of the National Plan.

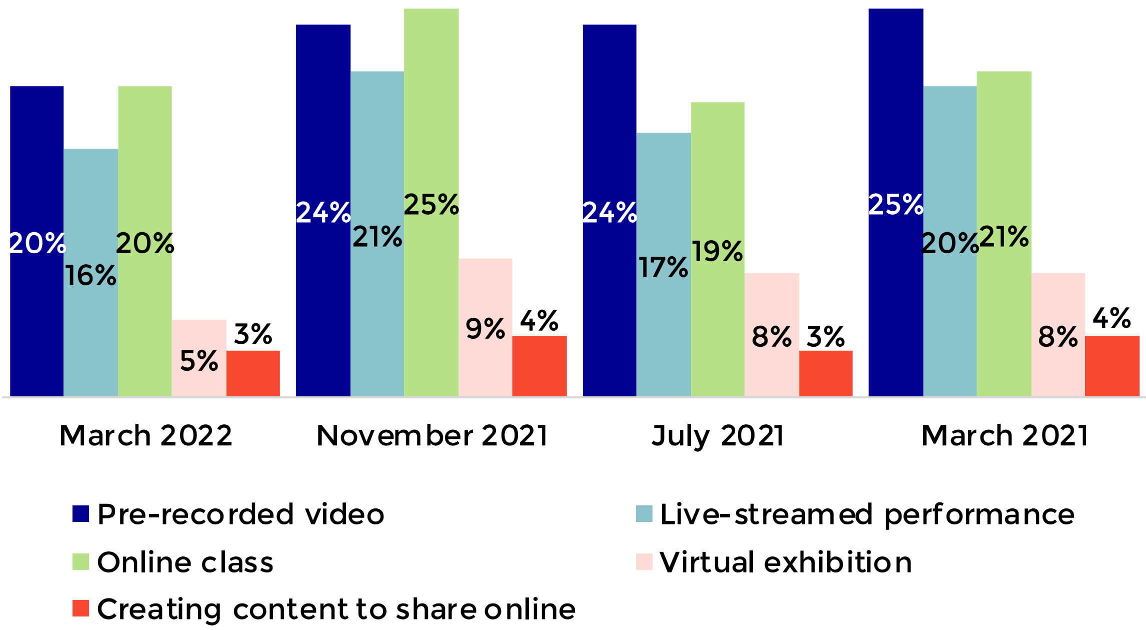
Around 4 in 10 (42%) of all surveyed audiences participated in an online arts experience in the fortnight before data collection (9-13 March 2022), a decrease from 48% in November 2021.

Following similar patterns to previous phases of data collection, the easing of restrictions on live attendance have meant audiences have greater freedom of movement to attend in-person cultural events – and are less inclined to look online for cultural experiences.

Since November 2021, participation in most activities has slightly declined, including online classes, courses and tutorials (20%, down from 25%), watching pre-recorded video of events (20%, down from 24%), live-stream video (16%, down from 21%) and seeing virtual exhibitions or gallery tours (5%, down from 9%).

While in the minority, the proportion creating content to share online has remained relatively stable throughout the last year (3%, compared to 4% in November, 3% in July and 4% in March 2021).

Figure 1: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). National audiences, March 2022 (n=8,384)



Audiences affected by 2021 lockdowns are most likely to be participating online – but states/territories are becoming increasingly similar

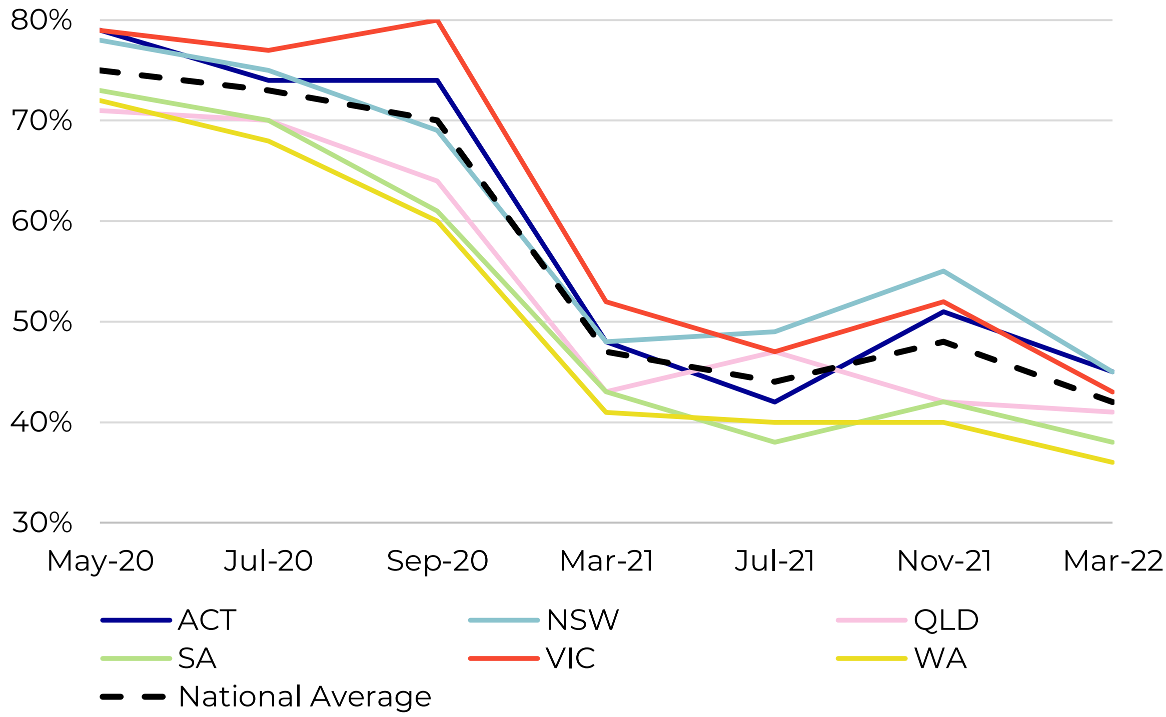
Though participation has declined nation-wide, audiences in states/territories that were affected by significant outbreaks and extended lockdowns in 2021 (NSW, Victoria and the ACT) continue to be more likely to be participating in online arts experiences, compared to those in other states/territories (SA, WA and QLD).

Extended lockdown periods have enabled these audiences to cultivate an appetite for digital content, compared to their interstate counterparts. Among NSW audiences, 45% are participating online (down from 55% in November 2021), among Victorian audiences, 43% are participating online (down from 52%) and among ACT audiences, 45% are participating (down from 51%).

These levels are lower in SA (38%), WA (36%) and QLD (41%), where audiences have typically had fewer disruptions to in-person attendance in the past.

However overall, and similar to live attendance patterns outlined in the National Snapshot Report, digital participation trends are becoming increasingly similar between the different states/territories, as Australians pivot towards a 'living with COVID' future.

Figure 2: Proportion of audiences participating in online arts experiences, by state/territory. May 2020 to March 2022 (n=8,384)



Among digital attendees, one-third continue to pay for online arts experiences

Among the audience members participating in online cultural activities, one-third (34%) continue to pay for digital experiences, though this proportion represents a slight decline since November 2021 (38%).

Some forms of payment have remained stable, such as the proportion purchasing a single experience (17%, stable with 19%), the proportion subscribing to a platform to access content on-demand (9%, stable) and the proportion subscribing to a program/season (7%, stable with 9%).

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Although marginal, the largest drop is seen in the proportion making a donation (12%, down from 15%).

Across the different states/territories, digital attendees in the ACT (38%), NSW (36%) and Victoria (36%) are the most likely to be paying for online experiences — while around 1 in 3 audiences in QLD (33%), SA (32%) and WA (30%) are paying.

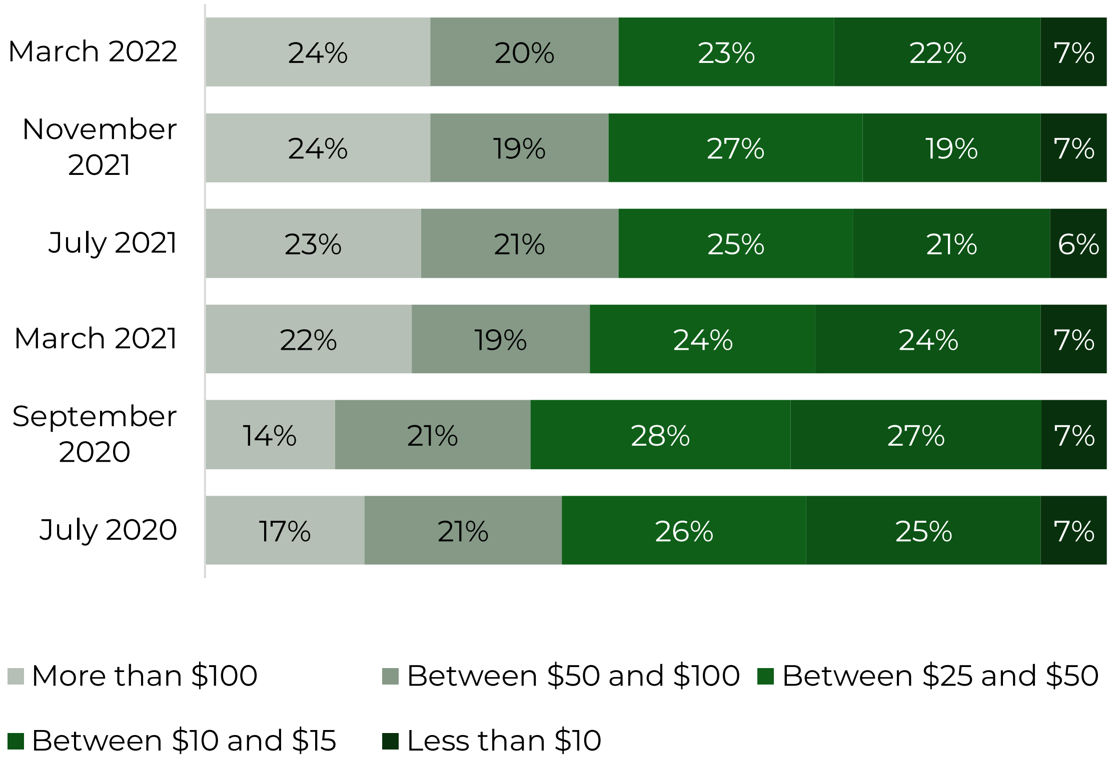
4 in 10 paying digital audiences are spending $50 or more on online arts experiences

Cultural organisations can expect a steadier outlook in 2022, as participation and spending patterns among digital audiences become more consistent.

In March 2022, 4 in 10 (44%) paying audiences said they spent $50 or more on online experiences in the fortnight before data collection (9-13 March 2022) — a level that has remained stable since November (43%) and July (44%) 2021.

With this trend remaining consistent for a little under a year, it appears that a small yet reliable market for high-quality digital experiences has emerged in the wake of the pandemic. With the knowledge that online engagement is more than a passing trend, arts organisations can begin to plan long-term digital strategies.

Figure 3: Can you share with us your total spending on online arts & culture experiences in the past fortnight? March 2022 (n=1,140)



Key digital audience segments

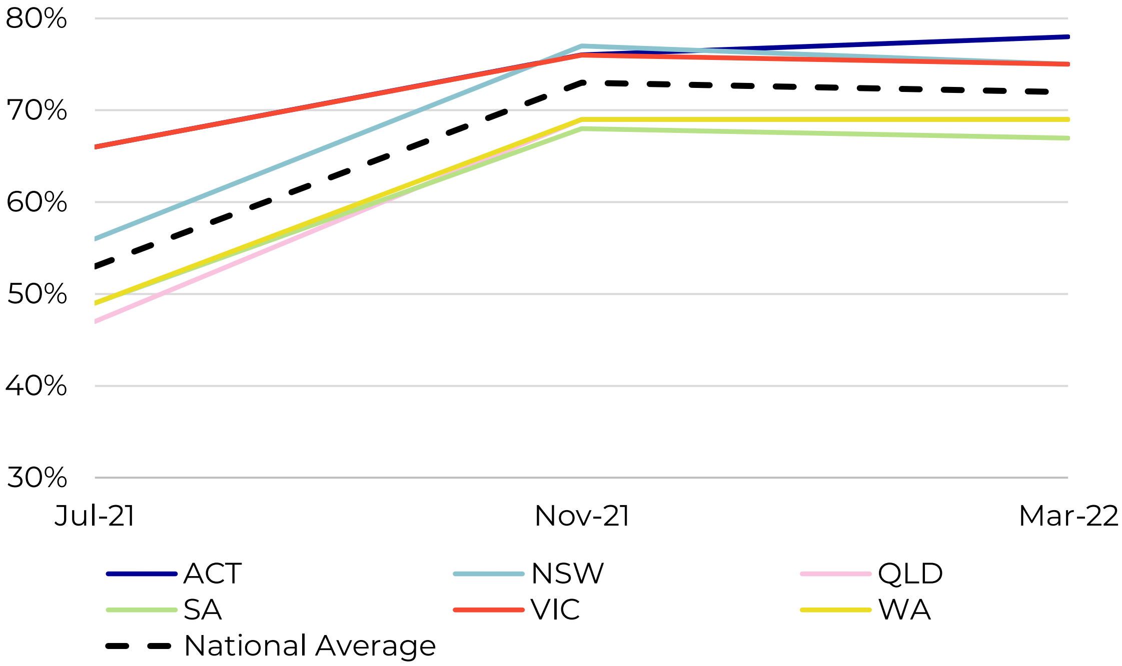
Though audiences are returning to in-person events, 7 in 10 continue to see a role for online arts experiences in their lives

Since July 2021, audiences have been asked, 'When venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life?'

The proportion of audiences who do see a role for digital in their lives increased significantly between July (53%) and November 2021 (73%), when many audiences were experiencing the tail-end of lockdowns in their state.

Since November, this rate has remained stable (73% in March 2022). A similar proportion of audiences see a 'substantial role' for digital arts experiences in their lives (26%, stable with 24% in November 2021), or even a 'small role' (47%, stable with 49%). The proportion who sees 'no role' is also stable since November (28%, compared to 27%).

Figure 4: When venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life? Proportion of audiences in each state/territory who selected a 'substantial role' or a 'small role'. March 2022 (n=8,355)



Marketing of digital experiences can be targeted to three groups

The March 2022 data confirms that three key audience segments remain for marketing digital arts experiences: 'digital devotees,' 'tired of tech' and 'selective but supportive' audiences.

Key facts about each audience segment are available in Table 1.

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1 in 4 are 'digital devotees' and value digital options in overcoming barriers to in-person attendance

Digital devotees are the 26% of audiences who see a 'substantial role' for digital experiences in their lives. They are the most likely to be engaging online right now, with 53% participating in arts and cultural activities online in the fortnight before data collection.

They are more likely to be vulnerable to a serious health outcome from contracting COVID-19 (15%, compared to 12% of audiences generally). Almost half (45%) are paying for online experiences and 52% of those spent more than $50 on online activities in the past fortnight.

Audiences who are more risk-averse see digital experiences as a way to enjoy arts and culture in a safe way, particularly when cases are on the rise. One said, 'For those of us that are vulnerable, we will not attend while case numbers are high, despite the health orders.'

Some continue to see digital options as overcoming barriers related to time, cost and location. One said,

> 'I live in a regional area and often it is very expensive or inconvenient to travel to the nearest capital city to attend events. I really appreciate online events/exhibitions and touring events.'

Others shared their appreciation for online experiences enabling them to experience works they would not otherwise be able to see. One said,

> 'There are many experiences that due to kids, life, work and commitments I can't attend, the online option for these is a huge plus from lockdown as I can see shows I would never be able to see in person.'

Another said,

> 'The ability to watch recorded shows from around the world gives a level of accessibility of theatre to me that I wouldn't otherwise get living here in Perth. I often sit and watch these recorded productions on my TV at home as my only way to actually see most of these shows. If they were put on here in Perth, I would 100% go and see them live, but obviously that is not often the case.'

Although many audience members have returned to regular live attendance in March 2022 (70%), some continue to be inhibited by serious concerns about their health or the health of others in their network. Exploring and developing digital offerings is one way that arts organisations can demonstrate they are mindful and inclusive of those who are more risk-averse.

‘Tired of tech’ audiences are eager to get out and re-connect with art in person

Tired of tech audience members are the 28% who see ‘no role’ for digital in their lives and are generally more eager to attend in-person. They are more likely than average to be ‘ready to attend whenever permitted’ (64%, compared to 59% of audiences generally).

During stay-at-home orders in 2021, some of these audiences members participated online in the absence of in-person events. With the country reopening and a return to live attendance seen in early 2022, these audiences are prioritising opportunities to reconnect at in-person events.

The proportion of ‘tired of tech’ audiences is slightly larger in states that weren’t affected by major outbreaks in 2021, such as SA (33%), QLD (31%) and WA (31%).

Several audience members mentioned being ‘Zoomed out’ or experiencing fatigue from technology – particularly after experiencing isolation. One said,

> ‘After 2 years of living in isolation and sick of Zoom and facetiming. I need face to face experiences.’

Another said,

> ‘I watched and participated in things online during lockdowns and before vaccinations, but they are no substitute for an outing and I am totally bored with online stuff.’

‘Selective but supportive’ audiences see a small role for digital – and are happy to consider a digital option

Selective but supportive audience members are the 47% that see a ‘small role’ for digital in their lives. They feel favourably about online offerings but will generally only participate in the right events and under the right conditions.

They are likely to favour digital events that are more convenient, more accessible or less risky than in-person alternatives. Around half of this segment (47%) participated in the fortnight before data collection, while around one-third (32%) of those participating paid to access online content.

The proportion of selective but supportive audiences is slightly larger among audiences in the ACT (53%) and Victoria (49%), where extended lockdowns in 2021 meant fewer opportunities for in-person attendance.

Some report that they prefer the ‘real thing’, but would happily consider a digital alternative where physical access is not possible. One said,

> ‘I think there is a place for online events - such as inability to attend an event in person. This may be one of the few good outcomes of the pandemic.’

Table 1: Key segments for online arts and culture experiences.

	Digital devotees	Tired of tech	Selective but supportive
Proportion of audiences	26%	28%	47%
The role of digital in their lives is...	Substantial	None	Small
Online participation rate	53%	22%	47%
Live stream participation rate	25%	5%	16%
Most interested in	Quality, high-production digital programming	Live performance	Hybrid events
Spending behaviours	45% participating online are paying for experiences	16% participating online are paying for experiences	32% participating online are paying for experiences
Demographic features	▸ More likely to be affected by 2021 outbreaks	▸ More likely to live in a regional/remote area (18%)	▸ More likely to be a parent (20%) ▸ More likely to be younger (61% are under 65)
Vulnerability to COVID-19 themselves or in their network	52%	43%	50%
Other behaviours	▸ Most likely to have frequently attended the performing arts, pre-pandemic (60%) ▸ More likely to earn a portion of their income from creating art (18%)	▸ Most comfortable attending in-person events right now (64% are ready to attend 'whenever permitted')	▸ Slightly more risk-averse (41% will only attend with minimal risks) ▸ Slightly less confident vaccination will allow a return to normal

What's next

To access state/territory-based findings about online participation, or for more information about the study, visit the Australian study's home page at: www.thepatternmakers.com.au/covid19.

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

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

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

Acknowledgment

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

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

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Web: www.thepatternmakers.com.au
Email: info@thepatternmakers.com.au
Phone: (02) 9188 7926