FACT SHEET: Fundraising, support and marketing

COVID-19 Audience Outlook Monitor
Australia, May 2020

37%
of audiences feel strongly committed to supporting arts and culture during the pandemic

1 in 4
audience members are very likely to support arts organisations financially

41%
of strong supporters have been impacted financially by the pandemic

8 in 10
subscribers and members for 2020 plan to renew for 2021

95%
of audiences are interested in some form of communications from arts organisations

56%
of audiences want notices about upcoming online events

20%
of audiences want to know how organisations are faring

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AUDIENCE OUTLOOK MONITOR.

Summary

Initial findings of the Audience Outlook Monitor were released on 18 May 2020, suggesting that many audiences understand the need to support for artists and cultural organisations during the pandemic.

This Fact Sheet provides further insight into audience attitudes to supporting arts and culture and the best messaging for different audience segments.

While many venues remain closed, 1 in 4 audience members say they are very likely to make a financial contribution to support an artist or cultural organisation.

Overall, highly engaged segments such as frequent attendees and members/subscribers demonstrate the strongest levels of commitment and willingness to donate. Donation campaigns targeted towards these segments will be important for fundraising initiatives.

Campaigns that offer merchandise, ticket vouchers and gift certificates can be targeted towards a broader range of past attendees. Less frequent attendees, younger audiences and contemporary music and comedy audiences show favourable feedback towards these methods of support.

Most people favour audience-centric updates about arts and culture content. They generally prefer to hear stories from artists and creatives, rather than executive-level messages. Some audiences are experiencing communications fatigue and would prefer fewer, shorter and more targeted messages that can offer practical means to support and engage with arts organisations they care about.

Background

This Fact Sheet outlines key findings about fundraising, support and marketing 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 fundraising, support and marketing nationally.

Attitudes towards support

Most past attendees want to support arts and culture during the pandemic

- Most audiences surveyed in this study (who are recent attendees of cultural organisations) say they are moderately (53%) or strongly (37%) committed to supporting arts and culture organisations that are important to them.
- The segments with the highest proportion of strongly committed audiences include:
  - Frequent attendees of museums and galleries (64%) and the performing arts (75%)
  - People who earn a portion of their living from performing and creating art of some kind themselves (59%)
  - People who are subscribers to a performing arts organisation (50%) or members of a museum or gallery (49%)
  - Respondents in higher income brackets, especially those who earn a household income of $3,000 or more per week (46%).
- Qualitative data collected from past attendees suggests that there is a good understanding of the need to support the sector during this time. There are also suggestions that this awareness could be growing and/or deepening. One person shared, 'As an industry that already lacks funding, [the pandemic presents] hard times ahead. But I also have made an observation that many people who weren't involved in the arts pre-COVID, have now gotten involved'.

Even if they feel committed, some feel they aren't financially able to show support during the pandemic

- Whilst there is widespread understanding of the need to support arts and culture organisations during the pandemic, some people note that they feel like they are not in a position to show their support financially at this time.
- While those who are strongly committed have higher household incomes, compared to those who aren't, many have experienced a loss of household income as a result of the pandemic (41%). In fact, those strongly committed

are slightly more likely to have lost household income compared to those moderately committed (38%) and those not committed (39%).

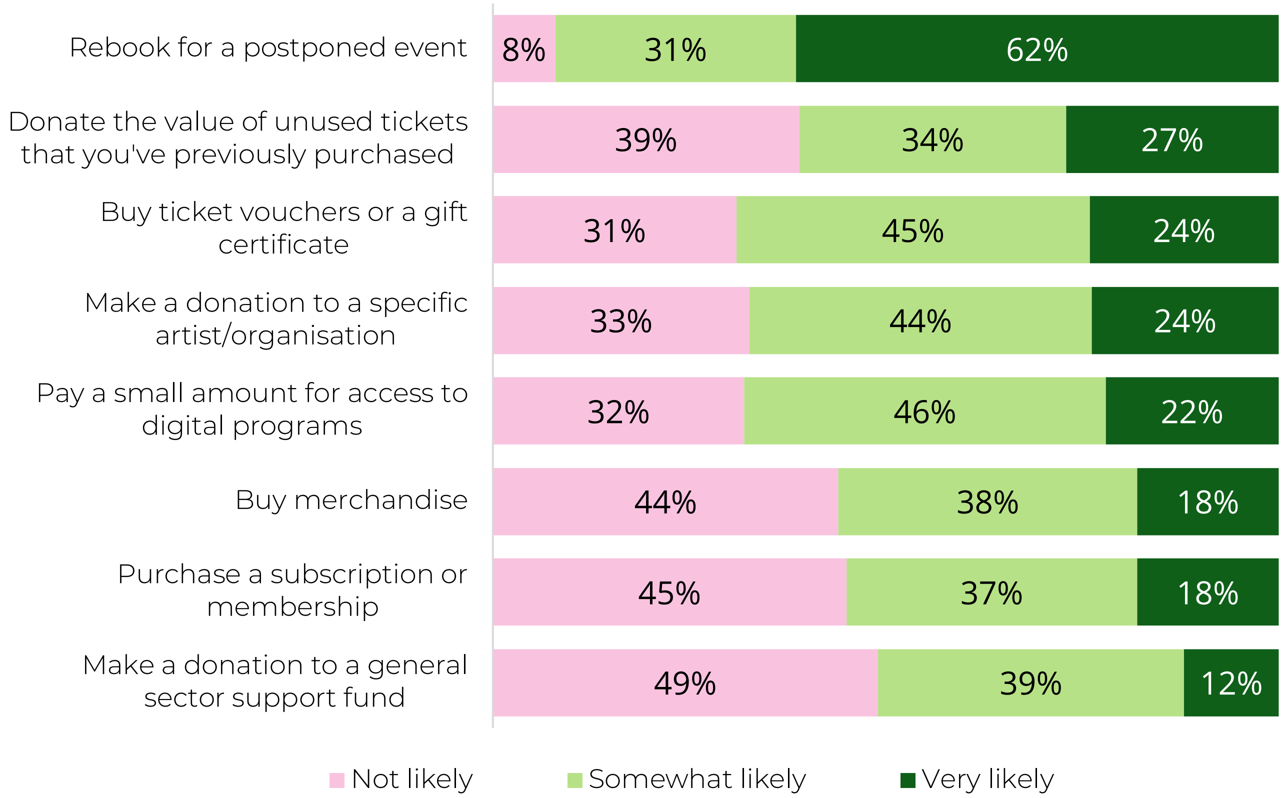
- When asked to explain the level of support they feel, two of those strongly committed shared:
    - 'Because the arts are such a vital part of life for me, providing inspiration, ideas and emotional therapy. And I want to keep these people in their jobs and support them. But even though I'm, in principal, committed, I don't have the funds to give big donations'.
    - 'I feel strongly about supporting the arts however I'm currently financially strained and concerned for my future employment so I'm being conservative in my spending'.

Likelihood to offer support

1 in 4 attendees are very likely to support organisations financially

- The survey asked respondents how likely they are to engage in different forms of support, such as making donations and pre-paying for tickets (Figure 1).
- The most common form of support that audiences are 'very likely' to show is rebooking for a postponed event (62% very likely). This is followed by one-quarter of respondents who would donate the value of an unused ticket (27%) or buying vouchers that can be redeemed for future programs (24%).
- More people say they are very likely to donate to a specific artist or organisation that is important to them (24%), rather than a general sector support fund (12%).
- Others would be very likely to participate in other forms of support, like paying for access to digital programs (22%), buying merchandise (18% or purchasing a subscription or membership, even if some of the events might be cancelled (18%).

Figure 1: How likely or unlikely are you to do each of the following to support one or more organisations in your community? n=22,730



Donations

Frequent attendees are most likely to donate to an artist or arts organisation

- As expected, audiences who feel strongly committed to arts and culture are more likely to participate in all forms of support, compared to those who feel less committed.
- Frequent attendees are showing higher levels of support than those who attend less frequently. Among those who attend performing arts weekly or more often, 44% feel very likely to make a donation to specific artists or arts organisations, along with weekly museum-goers (39%). This compares with 20% of those who attend the performing arts once a month and 11% of those who attend even less often.

- Donating to a specific artist or arts organisation is slightly more common among audiences aged 75 and older (28% are very likely to donate) compared to younger audiences, under 35 (24%).
- The likelihood to donate is also linked with household income. The proportion of those who are very likely to donate is highest among audiences who earn $3,000 or more per week (30% are very likely) and least common among those who earn up to $399 per week (17% are very likely).
- Metropolitan audiences are more likely to make a donation (25% very likely) than regional and remote audiences (17%).
- Potential donors are also much more likely to be subscribers and members of an arts organisation. Around one-third of performing arts subscribers (33%) and of museum and gallery members (35%) said they would be very likely to donate, compared to 17% of audience members who are neither.
- Across different artforms, the likelihood to donate is more common among audiences of First Nations (36% very likely), which is indicative of the high level of commitment to the arts of this audience overall.
- One audience member who said they would be very likely to donate in future shared, '[...] Any spare money I have I would be more likely to donate directly to independent artists and small arts organisations. I would also be more likely to purchase works and tickets directly from independent artists and small organisations / publishers / art collectives and community arts centres, as I feel this is where financial hardship will be most acute, and support will be most needed'.

Potential donors would like more guidance and information on their contributions

- Some audience members who said they would be very likely to donate in future shared that they would be interested in more information on how and what they can donate. One said, 'What is a suitable amount to donate? I.e. if you'd pay $10 for a live show/$5 for online/any is appreciated. For subscriptions what is to be expected?'
- Another potential donor shared, 'There are multiple venues and organisations asking for donations but what are we donating to and for? Happy to donate directly to artists but don't know enough about agencies to donate'.

- One shared that they would prefer to pay for future events and contribute to particular projects: '[...] I would happily buy tickets for a special event in up to 12 months time. If organisations are looking for support, I would be most receptive to giving small donations for a specific project/projects rather than a general donation'.

Subscriptions and memberships

Some audiences are cautious about whether to renew in 2021

- Around one-fifth (18%) of audiences say they are likely to purchase a subscription or membership to support an organisation, even if some of the events might be cancelled.
- The majority of existing members and subscribers plan to continue their membership into 2021 (82%). However, some say that the impact of the pandemic on events is likely to affect their decision to renew.
- Audiences who have lost household income as a result of the pandemic are less likely to renew their membership (79%) in 2021 compared to audiences who have not lost household income (84%). One audience member who has experienced a loss of income mentioned, 'Finances. I'm also unemployed due to COVID-19'.
- Another shared, 'I may just purchase one [ticket] at a time rather than a membership just until things settle down'.
- However, one audience member who lost household income shared that they may still be willing to purchase a membership at a discounted rate: 'Will there be an actual season? Actually I may purchase a discounted membership to support, even without a proper season'.

Vouchers and merchandise

Infrequent attendees may be open to buying vouchers for future attendance

- For the 25% of audiences who attend the performing arts only a few times per year the most common form of support is rebooking for a future event (87% are at least somewhat likely), followed by buying a ticket voucher redeemable for future programs (63% are somewhat or very likely).

- This suggest there may be a case to promote a gift voucher campaign among a broader range of audience segments, including less frequent attendees.

Merchandise offers should be targeted at younger audiences and those for comedy and contemporary music

- Buying merchandise is ranked higher as a form of support for audiences who attend the performing arts a couple of times per month (57%), compared to those who attend a couple of times a week (53%).
- Audiences under 35 are more likely to buy merchandise (33% very likely) than other age groups (18%).
- Buying merchandise is also a common form of support among audiences who attend comedy (22%) and contemporary music (22%), as well as audiences under 35 (77%) compared to other age groups (56%).

Support linked with digital participation

Some audiences are showing their support by engaging online

- When asked what motivated them to engage in online arts and culture activities recently, more than one-third of audiences 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’.
- As discussed in the Fact Sheet on online engagement, digital 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%).

Markets for digital work could be developed further

- In the fortnight preceding data collection (May 2020), 9% had subscribed to a platform to access content on-demand (e.g. a monthly subscription for guitar lessons), 12% had purchased a single experience (e.g. pay-per-view for an online performance) and 19% had made a donation as an expression of gratitude for something they experienced.

- While 66% had not paid in any way for a digital cultural experience, there are signs that the market could be developed further. 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 to children (71%).
- Among those that had paid for an online arts experience, a sizeable proportion had spent more than $50 (36%) or between $25 and $50 (27%).
- 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).

Audiences show favourable feedback towards pay-what-you-can offers online

- 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 expect to see, were freely available or available for a small cost. Having the choice to donate to a freely available artists or organisations work made me feel good'.
- There are signs that the option to donate for online experiences could be made more obvious. One member shared, 'I have not come across options to support the artist financially, FYI I watched a live performance of a singer songwriter, an artist paint a picture and attended zoom karaoke. Neither of these asked for small contributions to their work'.
- Another said, 'I'd love to see more possibilities for online (ticketed) performances. Something where I can pay to see a "live-ish" performance to provide opportunities for creatives and organisations to maximise their income. Even as a pay-what-you-can model, or donation-based'.

Audiences who are engaged online are particularly interested in hearing about future online events

- While most audiences want to hear about online events and digital offerings (56%), the interest in hearing about upcoming online events is particularly high among those segments who are engaging strongly online. This includes audiences such as:
    - Audiences with a museum or gallery membership (60%)
    - People with a disability (60%)
    - Frequent performing arts attendees (58%)
- When asked to share their feedback about communications from arts and culture organisations during the pandemic, one person shared, 'Keeping the clients engaged. If nothing is shared then people start to not miss it. Not easy but do keep in contact with members and show theatre and dance performances from the archives. This is important. Take care of each other'.
- Another suggested, 'It's an opportune time to gather images of visual art and assemble a digital exhibition, people are currently connected to their devices more than ever'.

Further details about online engagement in arts and culture during the pandemic can be found in the Online Engagement Fact Sheet, available at: https://www.thepatternmakers.com.au/blog/2019/4/5/audience-outlook-monitor-wave1-online-engagement.

Communications preferences

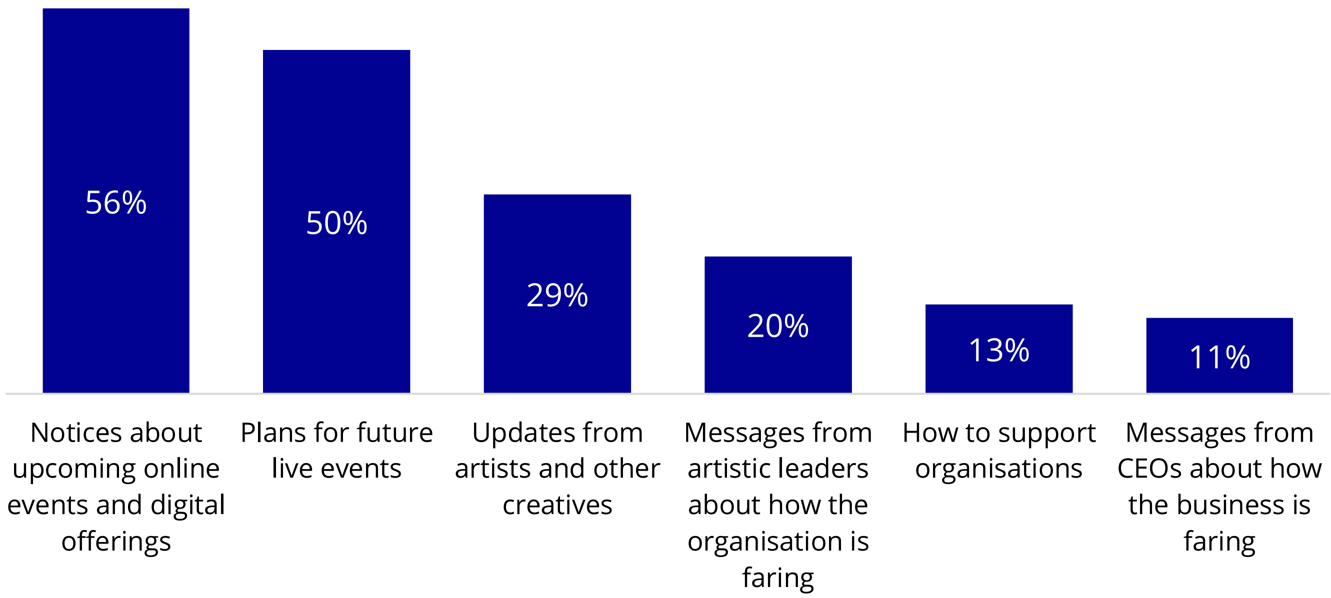
Audiences are most interested in content, but generally appreciate efforts to stay in touch during the pandemic

- A range of different communications topics were tested with audiences, and only 5% answered that none of the options were interesting to them, suggesting that most are interested in staying connected with arts organisations during the pandemic.
- Audiences are most interested to hear about upcoming online events and digital offerings (56%), and plans for future live events, post pandemic (50%).

These tend to rank higher than general communications about how organisations are faring.

- However, qualitative data suggests that audiences understand the role of email and social in staying in touch. One shared, ‘I think having a strong social media presence is important in these times to keep connected with audiences and reassure them that you'll be back once this is all over. Keeping up to date with interesting and relevant content is important to stay in engaged with audiences’.

Figure 2: From the following list of topics that arts & culture organisations might share with you during the pandemic, which two are most interesting to you? (respondents selected two)



Members would like to know how to support the artists and arts organisations they care about

- Members and subscribers would like information on how to support the artists and cultural organisations they care about. One said, ‘I really want to support my favourite artists and venues during this time. Though I am very selfish and ideally want performances for this support, I'm also happy to pay now to make sure everyone is there later’.
- On receiving communications, one member/subscriber shared, ‘It’s OK to ask for help – [it] would be tragic for arts venues & culture organisations to go under [and] small venues/organisations [are] most vulnerable. Use your

creativity to seek support from your supporters/patrons. As the arts has contributed so much joy to my & many others lives - we want to support you, as our lives will be less emotionally rich without your creative input. Please reach out. THANK YOU'.

- Other members/subscribers shared:
  - 'I would like to hear more about what I can do, where I can donate money etc by email or on their website because I don't use Instagram'.
  - 'I'd like to know more about what I can do to support arts orgs, as am employed and healthy and want to contribute'.
- One member supported new methods of asking for support: 'It seems to me that arts organisations are doing very well and to be commended for trying different methods [and finding] new ways of doing things. Promoting "friends of...(Dance North for example)" and having people join would be important to me. Also membership fees (with an incentive) provide a small way to contribute to the arts'.

Frequent attendees and potential donors want updates from artists and creatives

- In terms of communications topics, audiences who attend the performing arts a couple of times per week are more likely to want updates from artists associated with the organisation (39%) than those who attend a couple of times per year (23%) or once a month (28%).
- One frequent attendee shared, 'I really appreciate the updates from State Theatre Company and hear from some of the behind the scenes people. I just need to know that people in the arts community are ok. They are so important for the community'.
- Audiences who are likely to make a donation in future are also more interested in these updates (37%), compared to those who are not likely to donate in future (21%).
- Another saw a role for organisations to feature independent and emerging artists, syaing, 'It would be great for arts organisations to spend some time getting to know lesser known practices, especially artists working in regional areas'.

Updates from artists and creatives are preferred over corporate messages

- Several people mentioned that they would prefer to receive information about the artists and creatives associated with the organisation, rather than CEO-level communications. One member shared, 'The more personal the story, and the nature of storytelling, provides an authentic connection to how the organisation is faring rather than corporate high-level communications'.
- Another shared, 'Offering interviews with playwrights, performers or [Artistic Directors] are interesting. General chat to camera about a company is of no interest'.
- One performing arts subscriber suggested including CEO messages with artist updates, commenting, 'I would also like updates from artists associated with the organisation, for example, how they are individually coping. Some may use Facebook but I don't. Plus plans for future live events. These could be done by monthly newsletters combining information also from the CEO'.

Some audiences are beginning to feel fatigued with the frequency of communication

- While the majority of audiences are interested in keeping in touch, several people highlighted that overcommunicating can turn them off.
- This is true even among subscribers who plan to continue their subscription in 2021. One said, 'There's a bit of donor/subscriber fatigue starting to happen. I'm beginning to delete emails as they come in after a quick skim. I don't click on the various links - I don't like spending more time at the computer than I'm already having to'.
- Audiences who are planning to end their membership mentioned the overload of communications from arts organisations. One person shared, 'I subscribe to a lot of arts organisations and galleries. I was so overwhelmed by all the information that was sent out that in the end I deleted them all. Too much information! It would be much better to mention COVID-19 in passing and then get on with promoting the arts and artists'.

Some simply want to know when events will return

- Several people shared that in terms of communications, they would simply like updates on when events and venues will return to normal.
- In particular, audiences who are not members or subscribers to an arts organisation are more likely to be seeking information about future live events (54%) than performing arts subscribers (46%) or museum and gallery members (42%).
- This is also true for audiences who are not likely to donate in future (59% would like to know about/plan for future live events).
- One said, ‘I only really want to hear what peoples plans are for the future. We know what's happening now is out of our control so updates about the current situation I feel are kind of pointless. I would rather know what I can do in the future in regard to events and organisations’.
- Another shared, ‘Talk about the future, the shows that will be put on, the exhibits that will be displayed. Plan and act as if it will all come back to normal because it ultimately will, and I believe there will be a greater appreciation for all the arts and entertainment industry’.

Most audiences want simplified and less frequent communications

- Several comments indicated that audiences would like short and simplified communications that aren’t sent too often. This is common among audiences who are thinking about continuing their membership in 2021. One shared, ‘Some arts organisations send too many emails. I don't want to unsubscribe, as one mail a month is OK, but every few days… goes on my nerves’.
- Another respondent suggested, ‘A consistent newsletter format with simple clear design and embedded links. We are receiving so much information at the moment, clear communication that allows people to save for later, forward to friends, or quickly access the info they are interested in, is very helpful’.
- These responses confirm an appetite for targeted communications that offer useful channels for support and engagement for audiences.

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.

A range of Fact Sheets are available at the link above, focusing on audiences segments like Performing Arts and Museums and Galleries.

A series of recorded webinars are also available, providing 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.

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

Australian Government
Australia Council for the Arts
NSW GOVERNMENT
CREATIVE VICTORIA
Department of Local Government, Sport and Cultural Industries
GOVERNMENT OF WESTERN AUSTRALIA
Government of South Australia
Department of the Premier and Cabinet
Queensland Government