FACT SHEET: Regional audiences

COVID-19 Audience Outlook Monitor
Australia, September 2020

2,574
respondents living in regional and remote areas

37% compared to 30% of metropolitan audiences
of outer regional audiences have attended a cultural event recently

48% compared to 45% of metropolitan audiences
of outer regional audiences are making plans to attend a cultural event

85% compared to 75% of metropolitan audiences
of outer regional audiences are comfortable to attend outdoor events

80% compared to 72% of metropolitan audiences
of outer regional audiences expect to attend the same or more than before, long-term

55% compared to 72% of metropolitan audiences
of outer regional audiences would find face masks encouraging

62% compared to 72% of metropolitan audiences
of outer regional audiences participating in online arts and culture

38% compared to 35% of metropolitan audiences
of outer regional audiences are paying $50 or more on online arts and culture

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AUDIENCE OUTLOOK MONITOR

Summary

Phase 3 findings of the Audience Outlook Monitor were released on 15 September 2020, highlighting increased levels of attendance at cultural venues and events, as restrictions begin to ease around the country.

This Fact Sheet provides further insight into the 2,574 respondents living in outer regional and remote areas of Australia, where 37% have attended a cultural event recently.

Venue safety is important for regional audiences, even where the risk of community transmission is perceived to be minimal. The proportion of outer regional and remote audiences who feel ‘ready to attend’ (34%) is slightly smaller than those who have actually attended, as some feel cautious about public interaction considering recent outbreaks in major cities.

Events held in outdoor spaces, where there is open-air ventilation and enough space to spread out, are attracting the strongest level of support from regional audiences. When attending indoor venues, regional audiences are similar to metropolitan audiences in their preference for arranged seating and appreciate precautionary measures like limited capacity and clear social distancing guidelines.

Digital experiences are appearing to have an important role to play in providing access to arts and culture for regional audiences, while travel restrictions are in place. When asked what they’ll prioritise paying for online, many people mentioned online content that they would normally need to travel for, as well as supporting local and independent artists hardest hit by the pandemic.

Background

This Fact Sheet outlines key findings from 456 "outer/remote regional", 2,118 "inner regional" audiences and 8,749 "metropolitan" audience members connected with cultural organisations participating in Phase 3 of the Audience Outlook Monitor.

Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving around 150 arts and culture organisations, including museums, galleries, performing arts organisations, and festivals. Participating organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 3 results, from over 12,000 respondents, have been combined with Phase 1 and 2 data in a freely available dashboard. It's designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

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

About regional and remote audiences

This Fact Sheet identifies insights from survey respondents based in regional and remote audience locations, based on their self–stated postcode.

Postcode data has been categorised according to the Australian Bureau of Statistics Australian Post Code to Remoteness Area correspondence[1] and aggregated into three key segments: major city ("metropolitan"), inner regional and outer regional/remote. Where the views of the two regional groups are very similar, an umbrella term of "regional audiences" is used, referring to both inner regional audiences and outer regional/remote audiences.

[1] https://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/1270.0.55.005July%202016?OpenDocument

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 Phase 3 findings for regional/remote audiences.

Profile of regional and remote audiences

There are some demographic distinctions between inner regional and outer regional/remote and metropolitan audiences responding to the Audience Outlook Monitor in Phase 3:

- Inner regional audiences tend to be slightly older, with 63% aged over 55, compared to 56% for metropolitan audiences. Subsequently, the proportion of respondents in retirement is slightly higher among inner regional audiences (34%), compared to metropolitan audiences (30%) and outer regional/remote audiences (29%).
- The largest proportion of respondents based in inner regional areas live in Victoria (VIC) (41%), while the largest proportion of outer regional/remote respondents live in Queensland (QLD) (28%).
- Metropolitan audiences are slightly higher earners, with 28% in households earning $2,000 [AUD] or more per week, compared to 21% for inner regional audiences and 22% for outer regional/remote audiences.
- Outer regional/remote audiences are most likely to earn an income from performing or creating art (21%), compared to metropolitan audiences (16%) or inner regional audiences (15%).

Current conditions

Regional and remote audiences feel the most confident with public interaction

In September 2020, comfort levels in public activities vary markedly, based on rates of community transmission. Regional audiences are currently showing higher levels of confidence with public interaction, compared to those in metropolitan areas, where concerns about potential outbreaks are generally higher.

The proportions who feel at least somewhat comfortable eating at a local restaurant, is highest among outer regional/remote audiences (91%) and inner regional audiences (89%), while it is slightly lower for metropolitan audiences (85%). In terms of flying domestically on a commercial airline, outer regional/remote audiences are the most comfortable (58%), compared to metropolitan audiences (48%) and inner regional audiences (48%).

The proportion who feel comfortable using public transport is consistent among outer regional/remote (65%) and metropolitan audiences (64%), while it is smaller among inner regional audiences (55%).

Returning to events

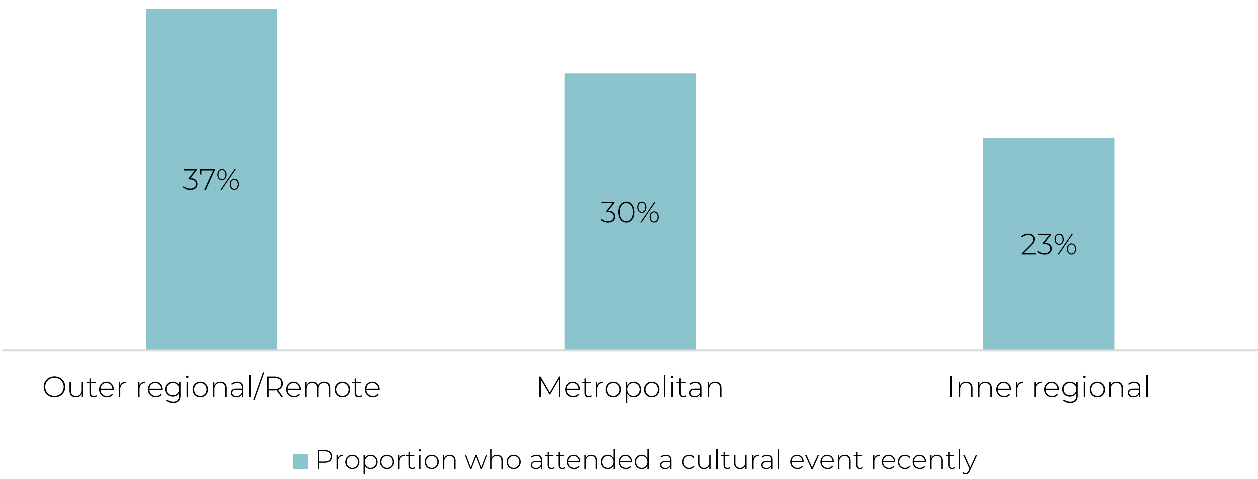
37% of outer regional/remote audiences have returned to a cultural event recently

Nationally, attendance at cultural events, of any kind, in the fortnight before data collection (2–6 September 2020) has increased since July (29%, up from 26%), as more venues and facilities reopen. Figure 1 displays the proportion of audiences in outer regional, inner regional and metropolitan areas who have attended a cultural event recently.

The rate of attendance is higher among outer regional/remote audiences, with 37% reporting that they attended a cultural event in the fortnight before data collection. By comparison, 23% of inner regional audiences and 30% of metropolitan audiences attended a cultural event in the two weeks before data collection.

The largest proportion of outer regional/remote attendees are returning to museums and galleries (18%, compared to 9% of inner regional audiences), which are the most common types of facilities to be open consistently.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? By remoteness area of respondent (3 categories). n=11,323



As performances return to venues, outer regional audiences are more likely to be buying tickets

Nationally, past attendees in outer regional/remote areas are more likely to be making plans to attend an event of some kind in future. Almost half (48%) report that they made plans within the fortnight before data collection, which is slightly higher than metropolitan audiences (45%) and inner regional audiences (37%) in comparison.

The largest proportion of outer regional/remote audiences are making plans to attend a live performance (26%), compared to 17% of inner regional and 24% of metropolitan audiences.

The proportion who are buying tickets in outer regional/remote areas and metropolitan areas is 15%, while in inner regional areas, it is 10%. Around half of outer regional/remote (51%) and metropolitan (52%) audiences are buying tickets for events less than one month out, compared to around two-fifths (39%) of inner regional audiences.

1 in 3 outer regional/remote audience members are ready to attend venues and events

In September 2020, outer regional/remote audiences are demonstrating the most confidence attending cultural venues and events, with 34% ‘ready to attend’, compared to 28% of inner regional and 29% of metropolitan audiences. The proportion of outer regional/remote audiences who are ready to attend is also higher than the national rate (29%).

Consistent with sentiments in different states/territories generally, inner regional audiences in Western Australia (WA) (44%), South Australia (SA) (40%) and Tasmania (TAS) (40%) are the most ‘ready to attend’ right now, compared to those in New South Wales (NSW) (25%) and VIC (25%). This outlook is also highest among outer regional/remote audiences located in TAS (49%) and SA (39%), compared to those in NSW (21%) and VIC (33%).

Regional audiences are the most comfortable with outdoor venues

Comfort levels with various cultural venues and events are higher among regional audiences, when compared to metropolitan audiences across Australia.

In attending outdoor events and performances, regional audiences are the most confident nationally, with 85% of outer regional/remote and 81% of inner regional audiences feeling at least somewhat comfortable attending. This is slightly lower for metropolitan audiences (75%).

Specific outdoor activities are appearing to attract varying levels of comfort, depending on their perceived capacity and seating arrangements. Most people would feel at least somewhat comfortable watching a performance seated in an amphitheatre, in outer regional/remote (86%), inner regional (81%) and metropolitan (81%) areas. Comfort levels drop slightly when attending an outdoor music festival with no seating, among outer regional/remote (60% feel at least somewhat comfortable), inner regional (50%) and metropolitan (45%) audiences.

Indoor venues are attracting stronger levels of comfort from regional audiences

In September, audiences around Australia are demonstrating higher levels of comfort with indoor venues, as many restrictions have begun to ease.

The proportion who feel comfortable attending large performance venues is highest among outer regional/remote audiences, such as stadiums (71%), compared to 53% of inner regional and 52% of metropolitan audiences. Outer regional/remote audiences are also more comfortable attending large theatres and concert halls (75%), compared to 66% of inner regional and 67% of metropolitan audiences.

Comfort levels with other types of cultural venues and events are also higher among outer regional/remote audiences. A greater proportion are at least somewhat comfortable to use a hands-on exhibit at an interactive museum (47%), compared to metropolitan (33%) and inner regional (36%) audiences. This is also evident for community art spaces, with 92% of outer regional/remote audiences feeling comfortable attending, compared to 86% of metropolitan audiences and 87% of inner regional audiences.

Social distancing guidelines are a key factor, and regional/remote audiences (93%) are showing similar levels of comfort attending venues with 4 square metres enforced, compared to metropolitan and inner regional audiences (both 92%). However, under a scenario of 2 square metres per person, outer regional/remote audiences are more comfortable (78%), compared to inner regional and metropolitan audiences (both 67%).

Few audience members of any region would be comfortable attending venues with no social distancing guidelines enforced. However, comfort is slightly higher among outer regional/remote audiences (23%), compared to inner regional (14%) and metropolitan audiences (13%).

Support for face masks is strongest in metropolitan areas

Results from Phase 1 of data collection (May 2020) revealed polarised views on whether the use of face masks would encourage (36%) or discourage (27%) audiences from attending cultural events. Inner regional (31%) and outer regional/remote (30%) audiences. were slightly more discouraged in May, compared to metropolitan audiences (26%).

Today, support for face masks has increased, and it is particularly high in locations that have more widely adopted their use amid recent outbreaks, such as VIC (88%) and NSW (80%).

Similarly, due to their denser populations, audiences in metropolitan (72%) and inner regional areas (69%) are showing stronger levels of support for face masks, while outer regional/remote audiences are less supportive (55%).

Audience experiences

Outer regional and remote audiences are generally satisfied with venue safety measures

When asked to reflect on their experiences returning to cultural events, most regional audiences appear to be satisfied with the safety measures taken by venue organisers, despite the minimal number of cases locally.

People who recently attended museums and galleries shared their appreciation for protocols such as pre-booking attendance, contact tracing, hand sanitiser and clear signage. One regional respondent commented,

> ‘I liked how you had to apply to get into the Tweed Regional Gallery to control numbers. Lismore Regional Gallery has two stations where you could provide contact information and loads of hand sanitizer! I also noticed that there were clear signs saying how many people were allowed in any gallery space at one time’.

Most respondents had no, or only minor, suggestions for improving venue safety. However, some expressed their concern that while community transmission is minimal, precautionary measures should be taken. One regional respondent said,

> ‘There was no social distancing at all. This was particularly concerning when we were waiting to enter the function room as we were packed in like sardines. Lucky we are in South West Western Australia’.

Another shared a similar view, commenting,

> 'Social distancing was accounted for but not totally adhered to. People seem to have forgotten social distancing making me think that complacency needs to be addressed'.

Clear communication and signage to enforce social distancing is important

Some attendees suggested improved signage and communication from staff to make social distancing guidelines clearer. One regional gallery visitor said,

> 'I don't know what would have happened if there had been more people wanting to enter because there was little instruction on what was expected and no floor markings'.

Another regional respondent shared a similar sentiment, though acknowledged the difficulty in crowd control, commenting,

> 'Nobody seemed to pay any attention to social distancing. Everyone just crowded about, mingling with each other. The gallery owner could have done more to keep people apart, but it would have limited the 'buzz' of the exhibition opening!'

Future attendance

Outdoor events are the most preferred option for most outer regional and remote audiences

In Phase 3, audiences were asked to rank their preferred setting for a cultural event, from a list of four options. Preference for attendance varies across the country, depending on rates of transmission and climate. One regional VIC respondent shared,

> 'As seniors, my husband and I are both high risk and would take a conservative approach. However, we live in a country area with no cases currently near us, but Melbourne traffic comes through the area on the way to other places'.

As summer approaches, open-air, outdoor venues, where there is enough lawn to spread out, are the most preferred option for audiences of any region. Outer regional/remote audiences (45%) are more likely to rank this option the highest, compared to metropolitan audiences (38%) and inner regional audiences (42%). It is even higher among outer regional/remote audiences in WA (53%) and SA (48%), where audiences are among the most confident about attending events, nationally.

One regional respondent said,

> 'There's not a lot happening yet in our area, but with the weather warming up an outdoor event is appealing'.

Another explained,

> 'Outdoors provides not only more space, but not sharing air conditioning and air with 50 plus people'.

A sizeable proportion would prefer a live-streamed digital program that they could watch from home. The proportion who ranked this option the highest is relatively consistent across metropolitan (35%), inner regional (36%) and outer regional/remote audiences (34%). Some regional audiences mentioned that digital is an opportunity to access arts and culture while travel to major cities is restricted. One said,

> 'We live in a small town on the NSW south coast, two-and-a-half hours from Canberra and four-and-a-half-hours from Sydney venues. If we lived in a major city, my choices would be different'.

Data indicates that audiences are more comfortable attending venues with fixed seating arrangements, compared to loose seating. The proportion who ranked an indoor venue with fixed seating the highest are metropolitan audiences (25%), while a slightly smaller proportion of inner regional (19%) and outer regional/remote audiences (19%) ranked this option highest.

Around 4% of audiences, in any region, ranked an indoor, flat-floor venue with loose chairs and plenty of space to spread out as their most preferred arrangement.

Some audiences expressed a desire to support more local venues and grassroots events

In Phase 3, audiences were asked 'Is there anything you can tell us about the types of venues or events you'll prioritise, and how they may differ from prior to the pandemic?'

Some respondents mentioned crowds and venue safety as a key factor, as one said,

> 'I'll prioritise those that maintain social distancing guidelines, allow for minimal touching of surfaces but still deliver a great experience! I am keen to support the industry and attend activities, but less likely to do so for indoor venues with no social distancing or hygiene practices in place'.

Some regional respondents mentioned avoiding travel to major cities for events, while community transmission continues to be a concern. One said,

> '[My] decision will be determined by the number of active cases in the area at the time. More likely to attend events in rural NSW than venture to Sydney'.

Another mentioned that restricted travel would allow them to avoid dense cities, and to support local talent,

> 'Prior to the pandemic I was more likely to travel to Melbourne City for events and venues, but I would be more inclined now to stay in Bendigo and support local venues and avoid the city more'.

Some people say they want to support local, 'homegrown', independent and grassroots community events. As one said,

> 'I will prioritise local events in my region to boost the local economy and support local artists and arts organisations'.

Regional audiences are optimistic about returning to events, long-term

In May 2020, 15% of national audiences said their future attendance will be negatively affected by the pandemic, long-term. In July 2020, this had increased to 22% nationally, and it remains stable at that level in September.

In September, this result is consistent across metropolitan and inner regional (both 22%) areas of Australia, where uncertainty about the likelihood of future outbreaks is generally higher. Outer regional/remote audiences, in comparison, are demonstrating more optimism, with just 15% saying they expect to attend cultural events less than before the pandemic.

When they feel comfortable going out again, most people expect to spend the same as they did before, among metropolitan (72%), inner regional (74%) and outer regional/remote audiences (79%). Around 10% of audiences expect to spend more than they did before the pandemic, across all regions.

Participating creatively at home

Audiences in all regions are participating creatively at home — both on- and off- line

Participation in most creative activities is fairly consistent among audiences across metropolitan, inner regional and outer regional/remote areas.

However, regional audiences are slightly more likely to be participating in some creative activities compared to metropolitan audiences. For example, the proportion making art and craft is higher among inner regional and outer regional/remote audiences (both 47%), compared to metropolitan audiences (39%).

The proportion collecting objects, artworks, or artefacts (19%) is also slightly higher among outer regional/remote audiences, compared to metropolitan and inner regional audiences (both 15%).

Regional audiences are less likely to be participating online compared to metropolitan audiences

Participation in online arts and culture activities is highest in metropolitan areas, with 72% of audiences participating online during the fortnight before data collection. By comparison, 67% of inner regional audiences and 62% of outer regional/remote audiences are participating online.

Consistent with metropolitan audiences, participation in online performances and events continues to reach the largest proportion of audiences, though this rate has fallen slightly across all regions (51% to 46% nationally). Around half (47%) of metropolitan audiences, 42% of inner regional and 41% of outer regional/remote audiences are watching pre-recorded online events currently. The proportion who are watching live-streamed performances or events is 39% for metropolitan audiences, 36% for inner regional and 31% for outer regional/remote audiences.

Participation in online classes, courses, and tutorials is also higher among metropolitan audiences (33%), compared to inner regional (29%) and outer regional/remote (28%) audiences.

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 32% of metropolitan audiences, 30% of inner regional and 28% of outer regional/remote respondents said they have.

Regional/remote audiences are participating less frequently than metropolitan audiences

Among those who are participating online, the greatest proportion of audiences who say they are participating more frequently than before the pandemic are in metropolitan (55%) and inner regional (53%) areas. Fewer outer regional/remote audiences are participating more frequently, by comparison (46%).

Although outer regional/remote audiences are participating online to a lesser extent, the proportion who are participating more frequently, are slightly more likely to say they'll continue doing so, post-pandemic (78%), compared to metropolitan audiences (74%).

Regional audiences are less likely to be paying for online experiences, but not necessarily spending less

Evidence suggests that the market for digital offerings is not declining, even while restrictions on live events begin to ease around the country. Across different regions, metropolitan audiences are the most likely to have paid for an online experience recently (41%), compared to audiences in inner regional (33%) and outer regional/remote audiences (30%).

The rate of donation is around 15% for regional audiences, while it is higher among metropolitan audiences, at 21%. Metropolitan audiences are also more likely to be purchasing single experiences (23%), compared to inner regional (17%) and outer regional (13%) audiences. The proportion who are subscribing to digital platforms is fairly consistent across all regions, at around 9%.

Further, spending levels appear to be fairly similar across different regions, and the proportion who are spending $50 or more on digital experiences is 35% for metropolitan, 32% for inner regional and 38% for outer regional/remote.

Regional audiences have multiple motivations for paid online experiences

In Phase 3, audiences were asked 'Thinking about your likely future spending online, if any, can you tell us what you'd prioritise?'

Many regional respondents expressed their appreciation for being able to access arts and culture they would normally have to travel to see. As one said,

> ''Live' music. We live remotely, being able to see things we would otherwise have to travel to Melbourne to see or get babysitters to go out in the evening / weekend has been amazing to see livestreams take off more'.

Several people mentioned classes, workshops, and learning opportunities, across all artforms, skill levels and age groups. As one commented,

> 'I've been really enjoying taking e-courses on all sorts of different topics that interest me (learning Japanese, poetry, meditation etc.)'.

Many people's spending online is motivated to support independent and emerging artists that have been hardest hit by the pandemic, as one respondent said,

> 'People who I think are most needy, which means individuals or experimental artists who are completely unsubsidised in the current scenario'.

What's next

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

There, you can access a range of Fact Sheets and 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.

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.

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