

Summary

As outbreak-affected states move towards re-opening, some regional audiences are cautious about risks at cultural events

- Regional audiences are generally highly engaged with arts and culture, and have been less affected by outbreaks than metropolitan audiences. However outbreaks in NSW, VIC and ACT (‘outbreak affected states’) over winter and spring have impacted attendance significantly in some regional areas.
- As of 1 October 2021, 40% of regional audiences living in outbreak-affected states say they are ‘ready to attend now or whenever permitted’. This declined from 59% in July 2021, when the Delta variant had not yet made an impact beyond major cities.
- This proportion is slightly smaller compared to metropolitan audiences in outbreak-affected states, among whom 44% are ready to attend – and some regional audience members are conscious that opening borders could present new risks, particularly for vulnerable communities in regional areas.
- In outbreak-affected states, regional audiences are only slightly slower in achieving vaccination targets – with 86% fully vaccinated – compared to their metropolitan counterparts (90% fully vaccinated) – and they lead the way compared to regional audiences in the rest of Australia (77%).
- Despite the high and increasing vaccinations rates, many are conscious that risks of transmission remain and want to see measures in place to keep audiences and staff safe at cultural venues as more Australians begin to move around the country.

Regional audiences see a role for the arts in community recovery – and most agree that proof of vaccination requirements will assist in the transition to ‘COVID-normal’

- With lower case numbers than metropolitan cities, regional audiences around Australia are eager to return to cultural events – but the majority see COVID-safety as an imperative while vaccination rates continue to climb.
- The majority of regional audiences feel encouraged by proof of vaccination requirements – both in outbreak-affected states (80%) and the rest of Australia (78%) and some say they won’t attend unless they are in place, at least in the short-term.
- Based on an opening scenario of 80% population vaccination rates, vaccine passports, some capacity limits and masks in indoor environments, comfort levels among regional audiences in outbreak-affected states should increase to:

- 71% very comfortable at museums/galleries (compared to 58% right now)
- 61% very comfortable at large theatres/concert halls (compared to 34% right now)
- 73% very comfortable at outdoor events with fixed seating (compared to 68% right now).
- Outside of outbreak-affected states, some regional audiences are cautious about the re-opening scenario and the lifting of travel restrictions could challenge comfort levels.
- Staying vigilant on COVID-safety will help provide greater confidence for regional audiences and artists – and enable cultural venues and events to play a role in bringing communities together and fuelling the recovery process.

Introduction

Ongoing outbreaks in major cities since March 2020 have impacted audience confidence across the country, for both metropolitan-based audiences and audiences in regional areas.

This Fact Sheet outlines key findings from regional audience members connected with cultural organisations participating in the Audience Outlook Monitor survey. It identifies insights from 1,706 survey respondents in the July 2021 phase and 320 respondents in the October 2021 'pulse check' who live in regional and remote audience locations, based on their postcode.

Postcode data has been categorised according to the Australian Bureau of Statistics Australian Post Code to Remoteness Area correspondence¹ and aggregated into two key segments: major city ('metropolitan') and regional/remote ('regional').

At times throughout this report, comparisons have been made between regional respondents in 'outbreak affected states' (NSW, VIC and ACT) and the 'rest of the country' (QLD, SA, WA, NT and TAS).

More information about the Audience Outlook Monitor data reported is available on the last page, or you can visit the study home page at:

<https://www.thepatternmakers.com.au/covid19>

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

National live attendance patterns

Regional Australians are generally highly engaged in arts and culture

The 2020 National Arts Participation Survey (NAPS) reports that engagement in the arts is strong in regional and remote areas of Australia. Pre-pandemic, the number of Australians travelling domestically to experience art and culture was growing, and Australians in remote areas are more likely to recognise the positive impacts of arts and creativity.

Although access to arts and cultural experiences are significant barriers for those living in regional and remote areas, this does not impact overall attendance as much as may be expected: 68% of respondents in remote areas were attending the arts prior to COVID-19, compared to 64% of those in regional areas and 70% of those in metropolitan areas.²

As powerful drivers for regional, domestic and international tourism, pre-pandemic attendance among regional audiences highlights the vital role the arts will play in reviving tourism and the economy.

On average regional audiences have been less affected by outbreaks, and around 6 in 10 continue to attend events

Prior to the Greater Sydney outbreak in July 2021, which led to extended lockdowns in NSW and VIC, live attendance in regional areas was relatively stable between March and July 2021, after a strong summer of rebuilding activity.

The July 2021 phase of data collection occurred during the second week of the Greater Sydney lockdown (7-11 July 2021), amid sweeping changes to restrictions in NSW that extended to the ACT and VIC.

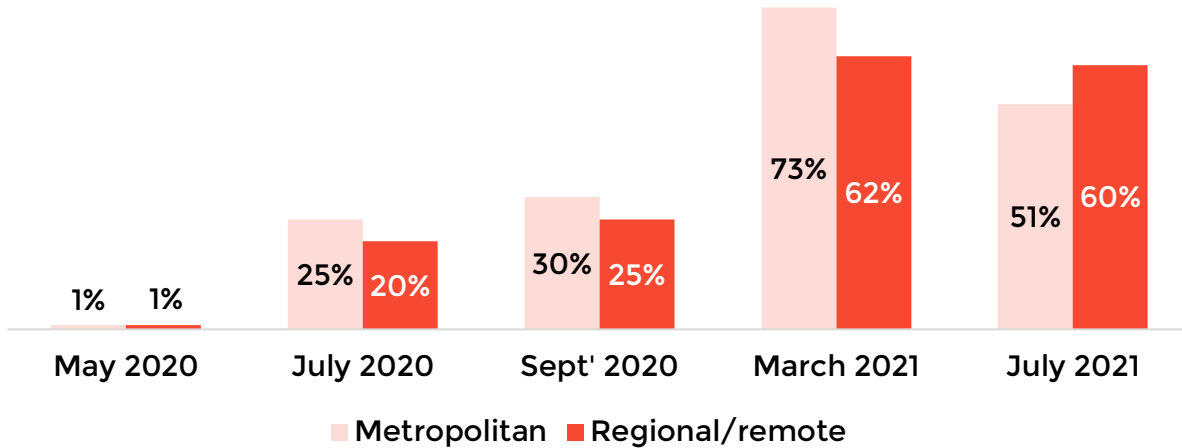
Live attendance in regional areas in July was consistent (60%) with the rate in March 2021 (62%), as outbreaks had not yet made an impact outside of major cities at the time.

Regional audiences attended different activities in similar proportions to March 2021, with the majority attending a live performance (26%) or visiting a museum or gallery (26%) in the fortnight before data collection.

² <https://australiacouncil.gov.au/advocacy-and-research/creating-our-future/>

Further data collection in November 2021 will illuminate the patterns of live attendance among regional audiences, following the easing of restrictions for lockdown-affected areas.

Figure 1: Proportion of audiences that attended a cultural activity in-person in the fortnight before data collection. Major city (n=6,480) vs. regional (n=1,712), July 2021



Despite fewer lockdowns, regional audiences are more cautious than those in major cities

The October ‘Pulse Check’ survey was designed to capture audience readiness to attend and sentiment around COVID-safety policies, between the July 2021 and November 2021 phases of data collection.

The results reveal that while attendance was steady prior to the winter Delta outbreak, confidence to attend cultural events has been impacted in recent months.

On average nationally, half (50%) of regional respondents reported that they are ‘ready to attend as soon as it is permitted’, declining from 63% in July 2021. The proportion of regional audiences who are ‘ready to attend’ is lower than metropolitan audiences (55%), signalling a greater degree of caution in some areas.

In outbreak-affected states right now, readiness to attend is lower for regional audiences (40%) compared to metropolitan audiences (44%) in those areas. Many are still working out how ready they are to attend, when events resume. One regional respondent said,

‘At present I have no idea of how the opening up in NSW and Victoria will play [out]. As we are not currently in this position I would need to wait and see what happens.’

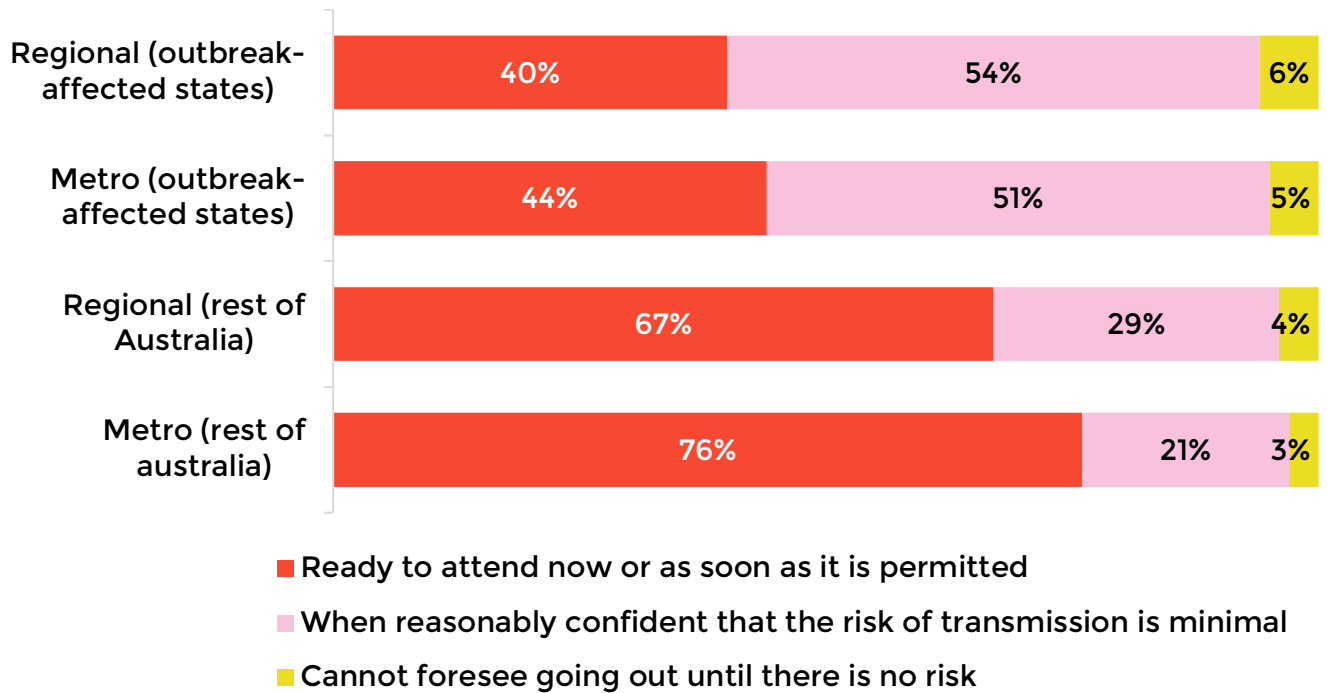
Regional audiences in the rest of the country (QLD, SA, WA, NT and TAS) (67%) are also less ready to attend right now, compared to metropolitan audiences (76%) – and this

rate is stable compared to July 2021 (69%). When asked about how they'd feel about attending when borders opened, several audience members expressed concern with the expected surge in visitation from lockdown-affected areas.

One said,

'It's hard being in QLD and watching what's happening in NSW and VIC. Opening borders feels like it would become inevitable for a wave of cases, hospitalisations and deaths to occur here.'

Figure 2: Which statement best represents how you feel about going out to arts and cultural events? Regional (n=320) vs. metropolitan (n=1,700), 1 October 2021



COVID-safety measures

Comfort has declined across the board — though regional audiences in outbreak-affected states are the most cautious

While on average regional audiences remain largely comfortable with most venue types, comfort levels have declined gradually between March and October 2021 – and they remain slightly lower compared to metropolitan audiences.

In outbreak-affected states, regional audiences are slightly less comfortable attending museums or galleries (92% at least somewhat comfortable, compared to 96% of regional audiences in the rest of the country).

A similar trend is observable at large theatres and concert halls, where 77% of regional audiences in outbreak-affected states are at least somewhat comfortable (compared

to 89% in the rest of the country) and comedy clubs and live music venues (42% at least somewhat comfortable, compared to 61% in the rest of the country).

In outbreak-affected states, comfort levels among metropolitan audiences are similar to those of regional audiences, such as for museums and galleries (89% of metropolitan audiences are at least somewhat comfortable), large theatres and concert halls (79%) and comedy clubs and live music venues (41%).

Comfort levels among regional audiences will be linked with the effectiveness of COVID-safety measures

Some audiences mentioned that their comfort level would depend on the efficacy of COVID-safety measures within particular venues. One said,

‘Comedy club or live music venues would have to impose very strict rules. Because these types of venues would be the hardest to control. I attend many comedy clubs and social distancing is very, very difficult. The rooms are usually small, hot, limited air circulation and people are laughing – hopefully.’

There are some differences between regional and metropolitan areas in outbreak-affected states. For instance, 91% of regional audiences in outbreak-affected states would be comfortable attending a community art space or studio, compared to 85% of metropolitan audiences in outbreak affected states. One said,

‘Smaller community venues allow me to gauge how 'busy' it is and I can decide if I go in or not. Larger venues are out for me.’

Although regional areas in the rest of the country are not directly affected at present, the ongoing outbreaks have negatively affected their future outlook on attending events. One said,

‘Other states have not taken COVID seriously. If we open borders, I'll be quarantining, because there is going to be a lot of illness and death in the community.’

Most regional audiences find COVID-safety measures encouraging — though small groups may challenge some measures

When considering COVID-safety at cultural venues, most regional audiences in outbreak-affected states say they find the listed COVID-safety measures encouraging. However, in some cases they are slightly less encouraged compared to metropolitan audiences in those states.

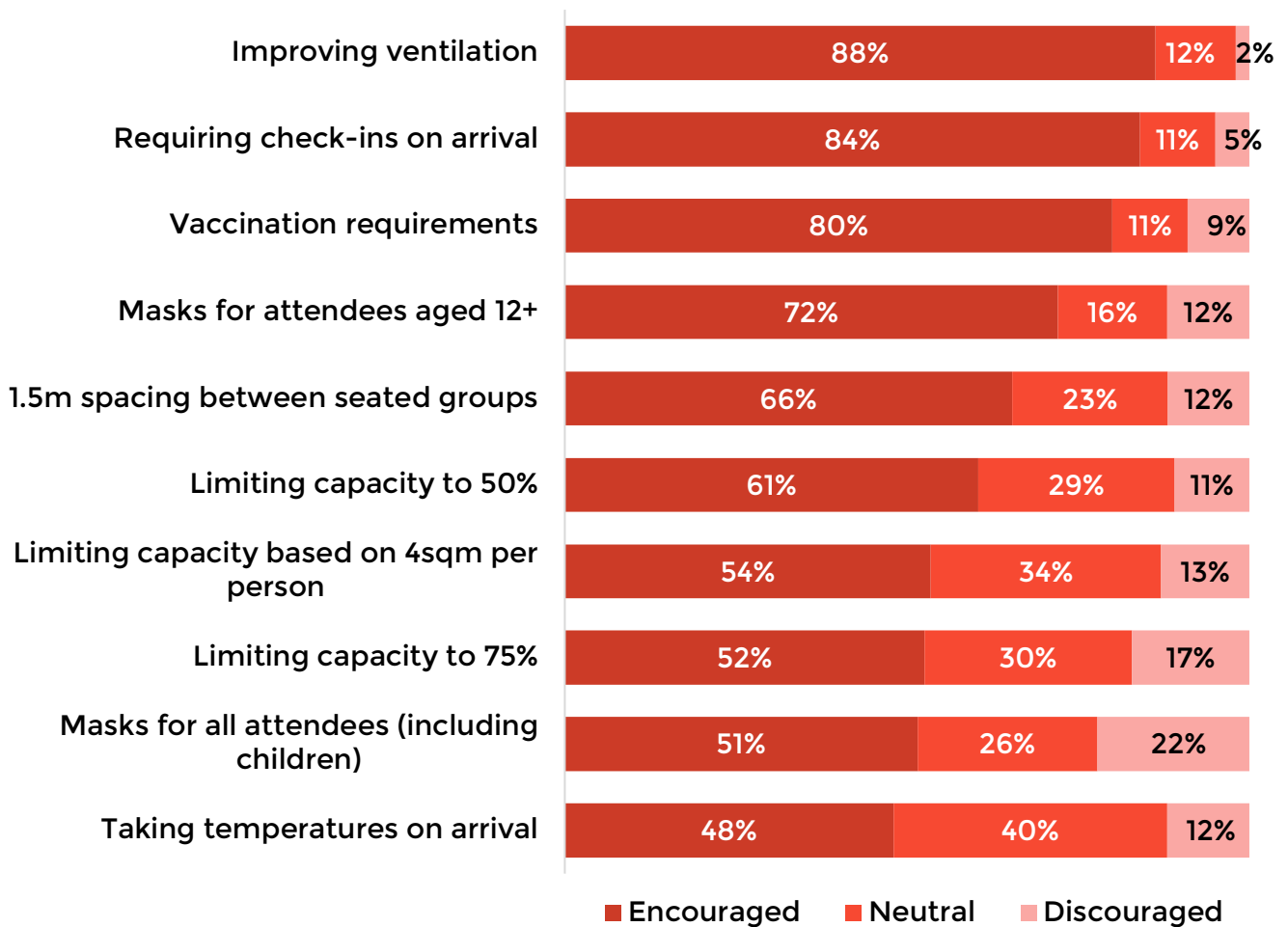
The largest proportion said they would be encouraged by improvements to ventilation systems (88% encouraged, compared to 91% of metropolitan audiences) and requiring check-ins on arrival (84% encouraged, compared to 88% of metropolitan audiences).

Vaccination passports were the third-most widely encouraging measure among regional audiences in outbreak-affected states (80% encouraged, compared to 89% of metropolitan audiences).

Improving ventilation was also the least likely measure to discourage regional audiences in outbreak-affected states (2% discouraged) – having the advantage of being both effective and unobtrusive.

While implementing changes to ventilation systems may not be feasible for some presenters, a valuable approach would involve messaging around existing ventilations systems – and reassurance on this point may help encourage attendance. Check-ins were similarly uncontroversial, with only 5% discouraged by this measure.

Figure 3: How much would each of the following steps discourage or encourage you to attend? Regional audiences in outbreak-affected states (n=192), 1 October 2021



In the rest of the country, regional audiences are similar to metropolitan audiences in terms of some safety measures

In the rest of the country, regional audiences are more encouraged by measures such as check-ins and vaccination passports – but less so by social distancing and masks.

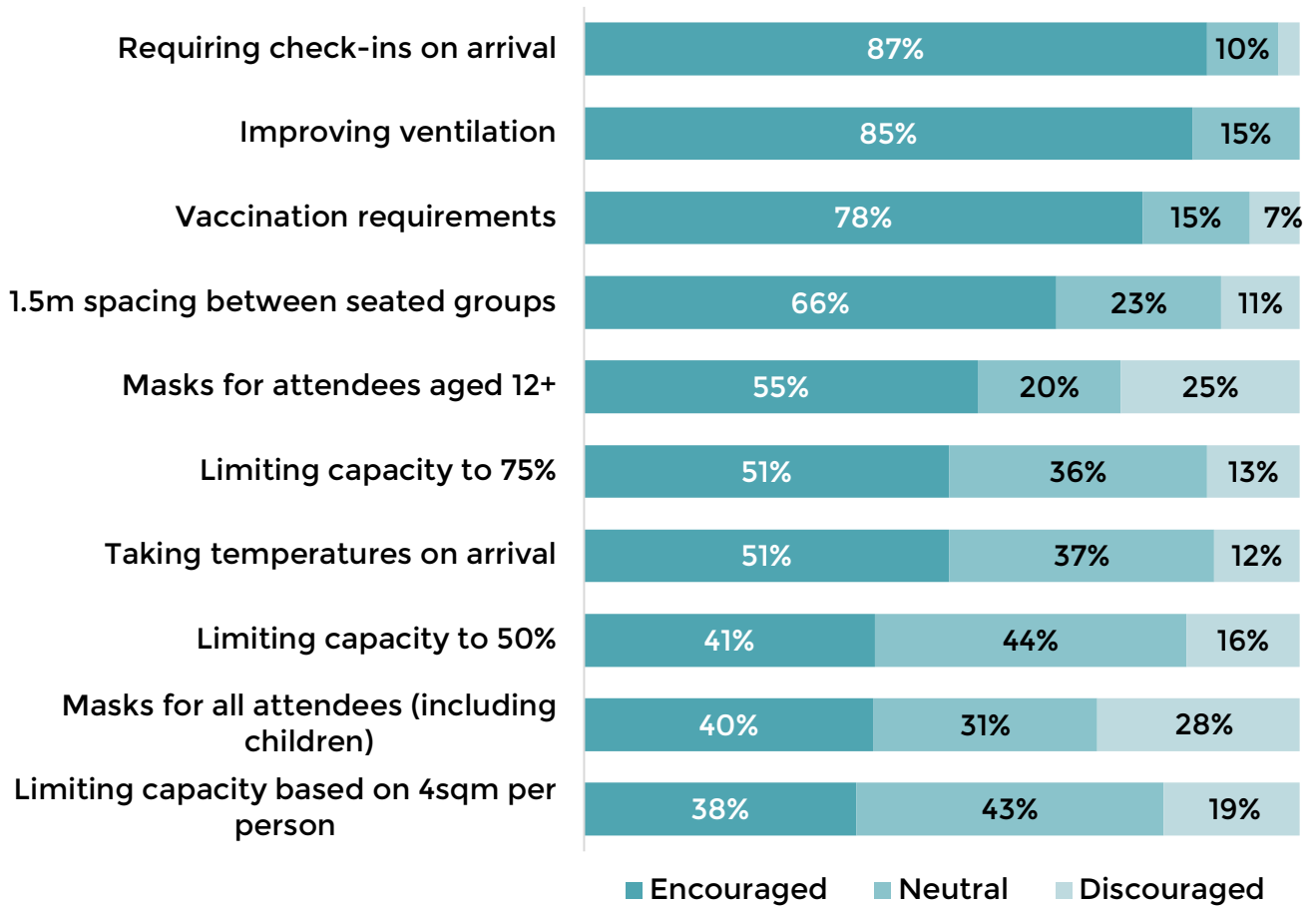
The largest proportion said they would be encouraged by requiring check-ins on arrival (87% encouraged, compared to 83% of metropolitan audiences) and improvements to ventilation systems (85% encouraged, compared to 82% of metropolitan audiences).

In terms of vaccination passports, regional audiences in the rest of the country were more encouraged by this measure (78% encouraged) compared to metropolitan audiences (69% encouraged) – and more similar to regional audiences in outbreak-affected states.

Compared to regional audiences in outbreak-affected states, those in the rest of the country were more likely to feel discouraged by some social distancing requirements and capacity limitations.

These audiences currently enjoy relatively unrestricted attendance – and therefore have negative responses to certain measures. For instance, a larger proportion feel discouraged by limiting capacity based on 4 square metres per person (19%, compared to 13% of regional audiences in outbreak affected states) and limiting venue capacity to 50% (16%, compared to 11% in outbreak affected states).

Figure 4: How much would each of the following steps discourage or encourage you to attend? Regional audiences in the rest of the country (n=114), 1 October 2021



Regional audiences are generally encouraged by mask-wearing for adults — but more polarised on mandates for children

Audience members were asked whether they would be encouraged by venues requiring the use of face masks for ages 12+, and for all attendees including children.

Overall, regional audiences are slightly less encouraged (66%) by the measure compared to those in metropolitan areas (70%), where mask-mandates have been adopted more widely.

However, this measure was more encouraging to regional audiences in outbreak affected states (72%) compared to the rest of the country (55%), where rates community transmission have been lower.

For some audience members, mask-wearing impacts their personal enjoyment of a cultural event.

One regional respondent said,

‘I really feel like wearing face masks is a downer on the vibe at events, and really stops you enjoying the social aspects of chatting and hanging out with your friends and family. They make me feel irritated when I wear them.’

Another shared that while their personal experience may be impacted, they remain supportive of protecting public health:

‘While I think wearing masks is a great tool to protect us all, personally they make me very uncomfortable and increase my anxiety, and I would rather not attend an event than have to wear a mask for a prolonged period of time. I am not against wearing masks though.’

When asked if they would be encouraged by mandatory mask wearing for all audience members, including children under 12, regional respondents in all areas were more polarised – though even more so in non-outbreak affected states.

In outbreak affected states, 51% are encouraged by this measure, compared to 55% of metropolitan audiences. One-fifth (22%) were discouraged by this measure, compared to 17% of metropolitan audiences.

By comparison, in the rest of the country, a smaller proportion of regional audiences felt encouraged (40%) and a larger proportion felt discouraged (28%) by this measure. These rates are similar for metropolitan audiences (39% encouraged and 29% discouraged).

Readiness and re-opening

Re-opening of venues and lifting travel restrictions could improve comfort for some regional audiences — but not as much as metropolitan audiences

Conditions are changing rapidly, and will continue to do so as outbreak-affected states begin to ease restrictions. The reopening of state borders could mean that the rest of the country sees cases rise for the first time.

To understand how readiness to attend may change in the coming months, audiences were asked to consider an **opening scenario** for attending events in which the following conditions were in place:

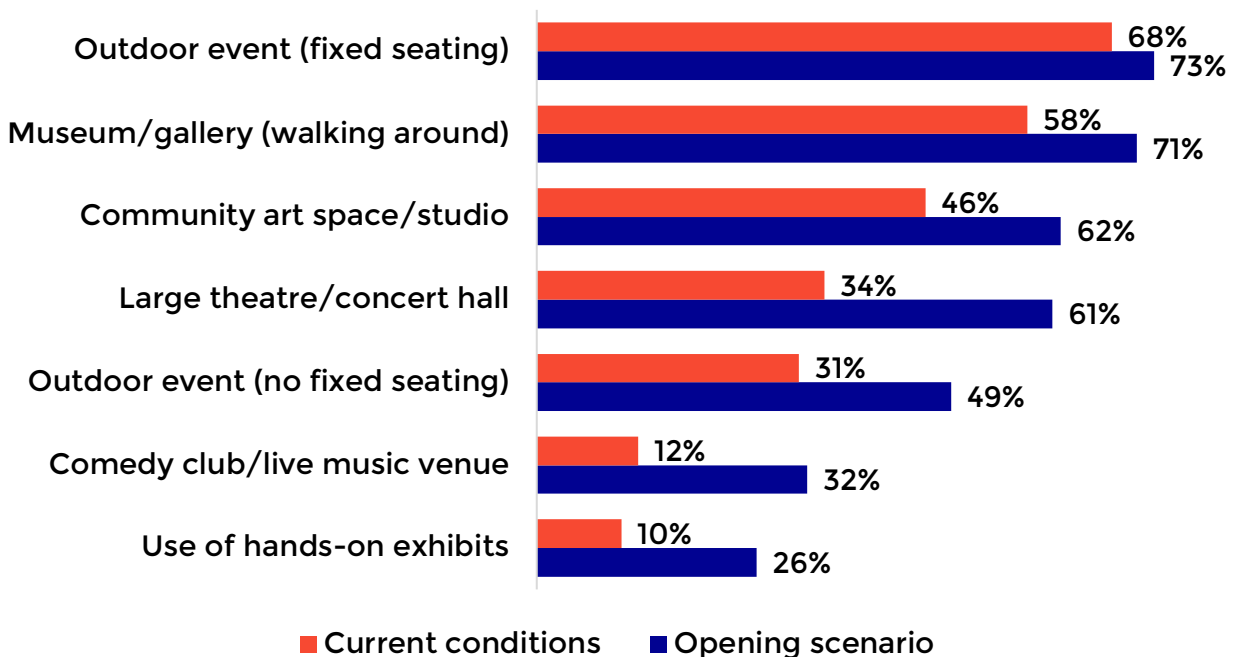
- interstate borders are open
- at least 80% of the population is vaccinated
- proof of vaccination is required at entry
- indoor venues are operating at 1 person per 4 square metres or 75% fixed seated capacity
- and masks are mandatory for those aged 12+ at indoor public venues.

Vaccine passports and masks indoors will increase comfort for regional audiences in outbreak-affected states

For regional audiences living in outbreak-affected states, new conditions under the opening scenario, such as proof of vaccination requirements, masks indoors and some capacity limits are likely to see comfort levels increase relative to the current scenario.

The majority of regional audiences in outbreak-affected states will be ‘very comfortable’ attending most venue types under the opening scenario. The greatest impact will be felt at large theatres/concert halls (+27% ‘very comfortable’), comedy clubs/live music venues (+20%) and outdoor events without fixed seating (+18%).

Figure 5: Proportion of regional audiences in outbreak-affected states who would be ‘very comfortable’ to attend selected cultural venues, current conditions and opening scenario, 1 October 2021 (n=1,356)



However, comfort levels will not improve as much as for metropolitan audiences. Under the opening scenario, metropolitan audiences are even more likely than regional audiences to see their comfort increase at some venues: community art spaces/studios (+21%, compared to +16% for regional audiences), museums and galleries (+19%, compared to +13%) and outdoor events with fixed seating (+12%, compared to +5%).

Regional audiences elsewhere remain concerned with reopening and exposure of the virus

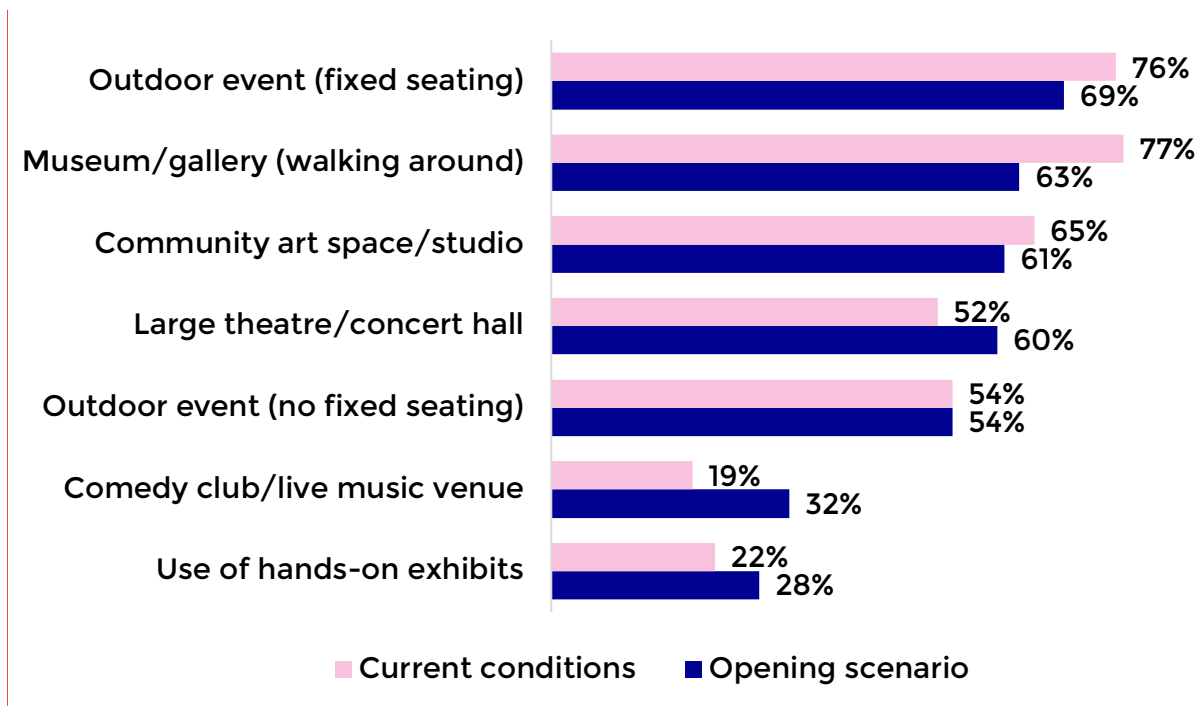
There are mixed views to the re-opening scenario, and some regional audiences outside of outbreak-affected states are conscious of the exposure of the virus to their community.

For example, regional audiences across the rest of the country are more comfortable with attending galleries and museums in current conditions (77% 'very comfortable') compared to the opening scenario (63% 'very comfortable').

A similar trend is observed for outdoor events with fixed seating (76% 'very comfortable' right now, 69% 'very comfortable' with opening scenario). For theatres/concert halls, the proportion who feel comfortable would increase under the opening scenario (60%, from 52% right now).

For outdoor events without fixed seating, audience attitudes remained the same.

Figure 6: Proportion of regional audiences in the rest of the country who would be 'very comfortable' to attend selected cultural venues, current conditions and opening scenario (n=764), 1 October 2021



Vaccination

83% of all regional audiences are fully vaccinated — a slightly lower proportion than metropolitan audiences (88%)

While arts audiences are, on average, more likely to be vaccinated than the general population, data suggests that the rate of vaccination has been slightly slower among regional audiences.

In July 2021, the proportion of regional audiences who were fully vaccinated was consistent with metropolitan audiences (at 23%).

As of 1 October 2021, a larger disparity exists between the proportion of regional audiences who are fully vaccinated and metropolitan audiences who are fully vaccinated. This is evident in both outbreak-affected states, where 86% are fully vaccinated (compared to 90% of metropolitan audiences).

Regional audiences in outbreak affected states are currently leading the way, compared to the regional audiences in the rest of Australia (77%).

However, the majority of unvaccinated regional audiences (in both outbreak-affected states and the rest of the country) say they will 'probably' or 'definitely' get vaccinated, suggesting that this disparity will be resolved as vaccine supply issues are ironed out.

Audiences are conscious that vaccination rates have been slightly slower in regional areas

The October results indicate that audiences are conscious of these factors affecting attendance and confidence in their communities. While the majority support proof of vaccination, the situation is complex – particularly given the slower roll-out of vaccines for regional and remote communities, such as Dubbo and Walgett in NSW³⁴. Some regional audience members expressed concern with the consequence of the Delta variant spreading beyond major cities. One said,

'In addition to the "80% vaccinated rule" there should be the qualification "that everyone eligible has been provided an opportunity to be vaccinated." There is evidence, or rather I have read, that some vulnerable members of society, such as disabled and carers, First Nations especially remote, have not yet been provided opportunity to be vaccinated.'

³ <https://www.abc.net.au/news/2021-08-14/covid-19-spreads-to-regional-rural-nsw/100376764>

⁴ <https://www1.racgp.org.au/newsgp/clinical/nsw-communities-left-high-and-dry-in-vaccine-rollo>

Another person shared,

‘I live in regional NSW and have not had the opportunity to be fully vaccinated due to lack of supply. Mandating double vaccination to access venues excludes members of our community.’

8 in 10 regional audiences would feel encouraged to attend if proof of vaccination was required at entry

With domestic travel expected to surge after restrictions begin to ease, regional venues can expect an influx of visitors from around Australia⁵ and cultural organisations should continue staying vigilant by adhering to COVID-safety measures.

8 in 10 (80%) regional audiences would be encouraged to attend events if proof of vaccination was required at entry – and this view was consistent between those in outbreak-affected states (80%) and the rest of the country (78%). One regional respondent said,

‘Robust systems for verification of vaccination status are very important to ensure confidence in the public.’

Another said,

‘Knowing everyone was vaccinated, wearing masks and still socially distanced would put my mind at ease whilst attending cultural events. Living with a family member who works in a hospital and comes into contact with aged care workers too does make me prefer stricter entry requirements.’

However, some suggested that alternatives would be needed to supplement proof of vaccination requirements. One commented,

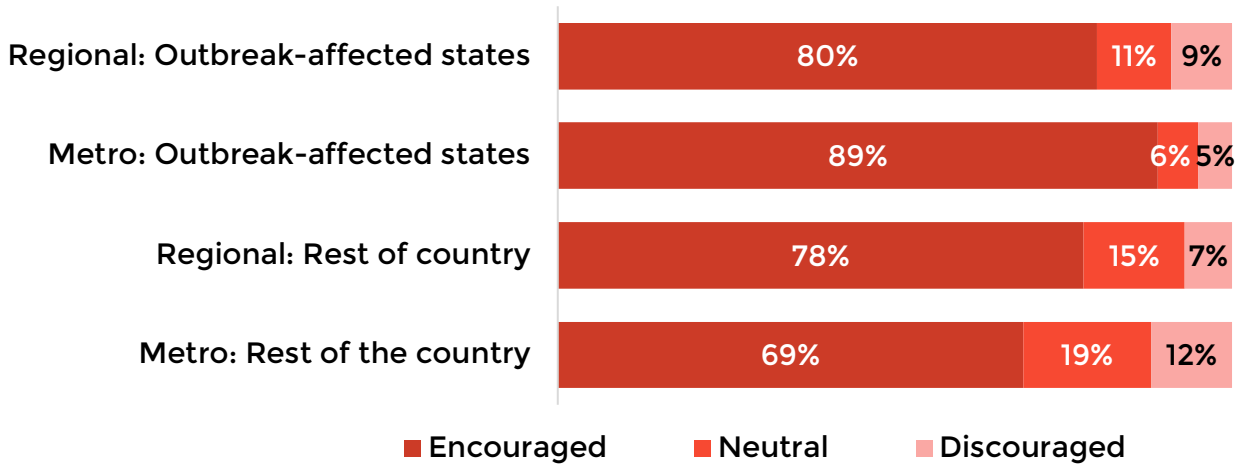
‘Proof of vaccination doesn't stop a vaccinated person being asymptomatic and COVID-19 positive, so some degree of caution is still necessary. Even now that I'm vaccinated I still don't want to experience a low-level case of COVID-19.’

Rapid antigen testing was raised as an alternative, or additional, measure that could further assist with keeping audiences safe – and organisations would be wise to monitor this development closely in the coming months. One regional respondent said,

‘I strongly support requiring entry to only fully vaccinated people with a provision that those with a valid medical exemption are rapid-tested before entry to the venue and are required to wear a mask, even if this is not required for fully vaccinated audience members.’

⁵ <https://theconversation.com/the-sun-is-setting-on-unsustainable-long-haul-short-stay-tourism-regional-travel-bubbles-are-the-future-140926>

Figure 7: How much would proof of vaccination requirements at entry discourage or encourage you to attend? Regional audiences, outbreak affected states and rest of Australia (n=2,024), 1 October 2021



Future outlook

Audiences see arts and culture as a way to bring communities together and rebuild local economies

COVID-19 restrictions – such as tighter domestic travel policies, border closures and ‘rings of steel’ around outbreak-affected states – have had a range of flow-on effects on regional communities. Many are facing significant socio-demographic changes, driven by a lack of tourism and the unprecedented surge of city-dwellers migrating to regional areas.⁶

The July 2021 results showed that while facing uncertainty, audiences are looking to support local talent, for both pragmatic and altruistic reasons. Some suggested that local events would be their preference for attending an event as they involve a lower level of risk. Others want to support their local scene, particularly artists who have been negatively affected by the pandemic, as one audience member said,

‘We want to support artists, performers, behind the scenes and venues who were doubtless impacted by the events – and increased appreciation for the local arts scene.’

In the transition to ‘COVID-normal’, cultural organisations can take this opportunity to invest in homegrown talent. In addition to being a good way to minimise risk while supporting artists locally, it may make it easier for artists to access support in the event of cancellations.

⁶ <https://www.abc.net.au/news/2021-02-02/abs-data-confirms-city-exodus-during-covid/13112868>

Reflecting on the Geelong Gallery's pandemic learnings, winner of the Audience Outlook Monitor's Insight in Action Competition, Simone Mugavin said,

'Connecting with local audiences by presenting the work of local artists through both digital and in-person experiences has been the biggest success for our Gallery. It has given the Gallery a unique drawcard amongst regional galleries, whilst encouraging our community to celebrate born and bred locals, creating a very strong sense of town pride.'

In the July 2020 phase of the study, past attendees were asked, 'What role can arts & culture organisations play in your community, to assist with recovery from the pandemic?' – and they were invited to share ideas and examples, great or small.

Several themes emerged, offering insight into the compelling ways that arts and culture can support the rebuilding of communities. They include:

- ▶ Place: Reanimating public places and community spaces
- ▶ Connect: Bringing people together after isolation
- ▶ Escape: Letting us forget our problems and inhabit other worlds
- ▶ Heal: Processing the pandemic and grieving for what has been lost
- ▶ Transform: Helping us grow and progress as a society
- ▶ Remodel: Rethinking the way arts and culture works.

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

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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.