Audience Atlas Victoria

Appendix 5: Regional differences

October 2019

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Regional differences in the culture market

Differences across Victoria's regions highlight the **idiosyncrasy** of the culture market. **Regional Victoria** tends to have a **more well-represented Culture Segment profile** than Melbourne, which favours the more culturally active segments.

Those who live in **Melbourne** are **more likely** to intend to **spend** more and **attend** more arts and culture, and there is a **large lapsed cohort** for most artforms in regional Victoria.

Regional Victoria has a more balanced segment profile

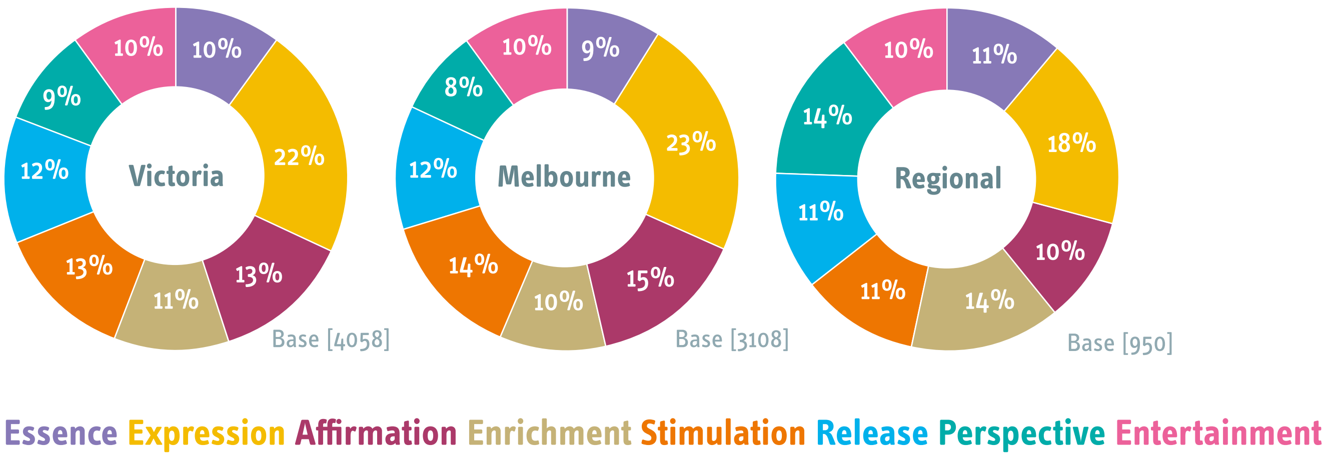
While many of the Culture Segments are present in broadly similar proportions across Victoria, there are a few marked differences within the State. In all areas, Expression is the largest segment, typically representing 1 in 5 of the market. This is largest in Melbourne's North West at 29%, and smallest in regional Victoria at 18%.

Stimulation and Affirmation are the next two largest segments in the State as a whole, representing 13% each. Although this pattern is similar across the State, the overall pattern in regional Victoria is more equally represented across the segments, with the majority of segments representing 1 in 10.

Perspective is the only segment that is significantly over-represented in regional Victoria compared to the market overall, at 14% vs 9% overall. This is similar to results in 2014, where Perspective also over-indexed.

This is likely to be reflective of demographic patterns to a large extent. Perspective is less likely to be found among the younger-than-average demographic found in Melbourne.

Culture Segment profile by region



Cover image: Jacques the French waiter is seen performing at the 2017 Clunes Booktown Festival.

Photograph by Chris Hopkins

Regional differences in anticipated future spend on arts and culture

Across the State, around half of respondents (49%) do not anticipate any change in their spending on arts and culture. A further 19% don't know if their spending will change, and this figure is higher in the areas outside Melbourne (23%) and in Mornington Peninsula (25%).

Overall, the culture market is more likely to anticipate spending more (18%) than less (13%). This pattern is comparable across Victoria, with one exception. Those who live in Mornington Peninsula and Latrobe-Gippsland are significantly more likely to anticipate to spend less than more.

Those based in Inner-Melbourne were most likely of any group not to intend to change their spending habits in the next 12 months at 56% compared to 49% overall. This group was also the most certain about future spending, with only 13% saying they didn't know.

Predicted expenditure on arts and culture over the next 12 months

	Likely to spend more	Likely to spend the same amount	Likely to spend less	Don't know
Total	18%	49%	13%	19%
Regional average	16%	46%	15%	23%
Ballarat & Bendigo	15%	45%	17%	23%
Latrobe-Gippsland	11%	43%	20%	26%
North West Victoria	15%	51%	12%	23%
Shepparton & Hume	21%	46%	13%	19%
Warrnambool, South West & Geelong	19%	48%	7%	26%
Melbourne average	19%	50%	12%	18%
Inner-Melbourne	21%	56%	13%	19%
Melbourne – North East	19%	44%	11%	26%
Melbourne – North West	23%	41%	17%	19%
Melbourne – Outer East	15%	55%	8%	22%
Melbourne – South East	20%	50%	15%	16%
Melbourne – West	19%	45%	16%	21%
Mornington Peninsula	14%	45%	17%	25%

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More likely to do more in Melbourne

Respondents were asked about their intentions to attend arts and culture in the next 12 months. Nearly half (47%) of the market have no plans to change their cultural consumption, which is broadly consistent across the State. Mornington Peninsula is significantly more likely to attend the same amount at 54%. A quarter (24%) intend to increase the amount of arts and cultural events they attend. This proportion grows to 32% in Inner-Melbourne, and is lowest in Latrobe-Gippsland at 16%.

Only 11% intend to spend less than they do now, which is consistent across the State with the exception of Melbourne West, who at 15% are the most likely to intend to do less.

Predicted attendance for arts and culture over the next 12 months

	Likely to attend more	Likely to attend the same amount	Likely to attend less	Don't know
Total	24%	47%	11%	18%
Regional average	19%	47%	11%	17%
Ballarat & Bendigo	20%	49%	7%	24%
Latrobe-Gippsland	16%	51%	6%	26%
North West Victoria	22%	48%	12%	18%
Shepparton & Hume	19%	46%	11%	23%
Warrnambool, South West & Geelong	22%	43%	8%	27%
Melbourne average	26%	47%	11%	24%
Inner-Melbourne	32%	47%	9%	12%
Melbourne – North East	24%	45%	10%	21%
Melbourne – North West	26%	42%	15%	17%
Melbourne – Outer East	21%	50%	11%	19%
Melbourne – South East	24%	45%	14%	18%
Melbourne – West	21%	42%	15%	21%
Mornington Peninsula	21%	54%	7%	18%

Relatively consistent levels of donating across the State

Typically around 40% of the culture market have donated to support arts and culture, and this is broadly consistent across most of the State. The highest proportion is in Inner-Melbourne at 46%. Those based in Mornington Peninsula are the most likely to have donated recently (in the last 12 months) at 18% compared to 15% on average.

By far the most common method of donation is giving a one-off donation, with 39% of the market ever having done so. 14% of the market have done this in the past 12 months. Leaving a gift in a will had the lowest take-up at 8%, although had the highest proportion of interest at 15%. Those in Melbourne West were most likely to be open to leaving a bequest at 21%.

Note: In Audience Atlas 2014, volunteering behaviours between regional Victoria and Greater Melbourne were explored as there were significant differences between the two. In 2019, there are no significant differences in volunteering behaviour, so this has not been reported on in detail in this appendix.

Donation behaviour for the culture market

	Donated in the last 12 months	Donated 1–3 years ago	Donated over 3 years ago	Never donated, but interested	Never donated, not interested
Total	15%	11%	14%	13%	47%
Regional average	14%	9%	14%	12%	52%
Ballarat & Bendigo	15%	11%	17%	9%	48%
Latrobe-Gippsland	8%	5%	21%	16%	49%
North West Victoria	16%	9%	10%	11%	54%
Shepparton & Hume	22%	21%	13%	16%	38%
Warrnambool, South West & Geelong	16%	9%	7%	11%	50%
Melbourne average	15%	12%	14%	14%	45%
Inner-Melbourne	17%	16%	13%	14%	41%
Melbourne – North East	17%	9%	17%	16%	41%
Melbourne – North West	15%	10%	15%	18%	41%
Melbourne – Outer East	12%	7%	11%	10%	59%
Melbourne – South East	11%	14%	14%	14%	46%
Melbourne – West	11%	13%	17%	13%	46%
Mornington Peninsula	18%	7%	11%	16%	48%

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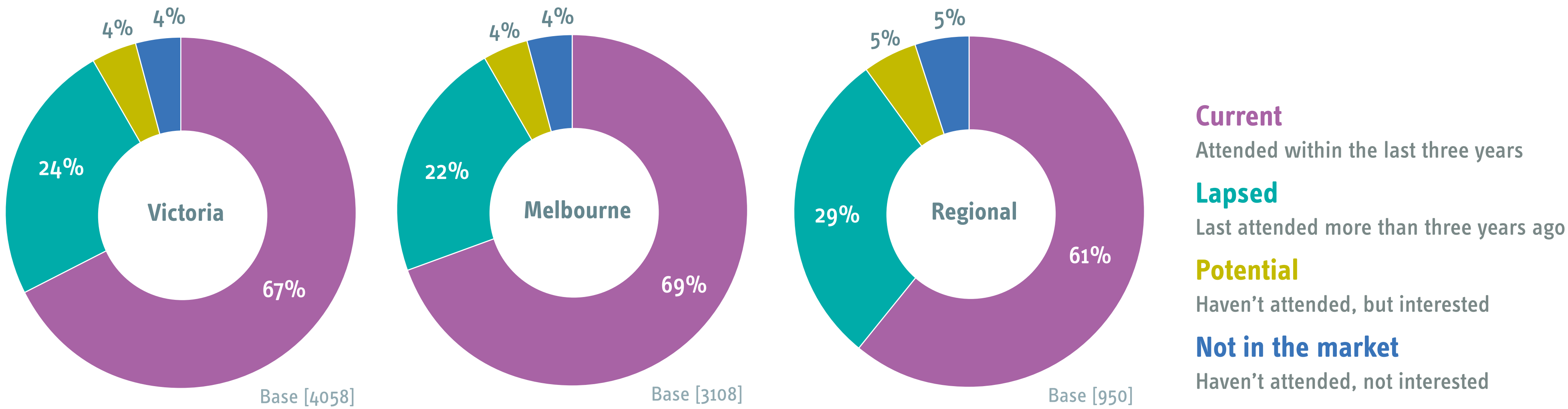
Museum attendance by region



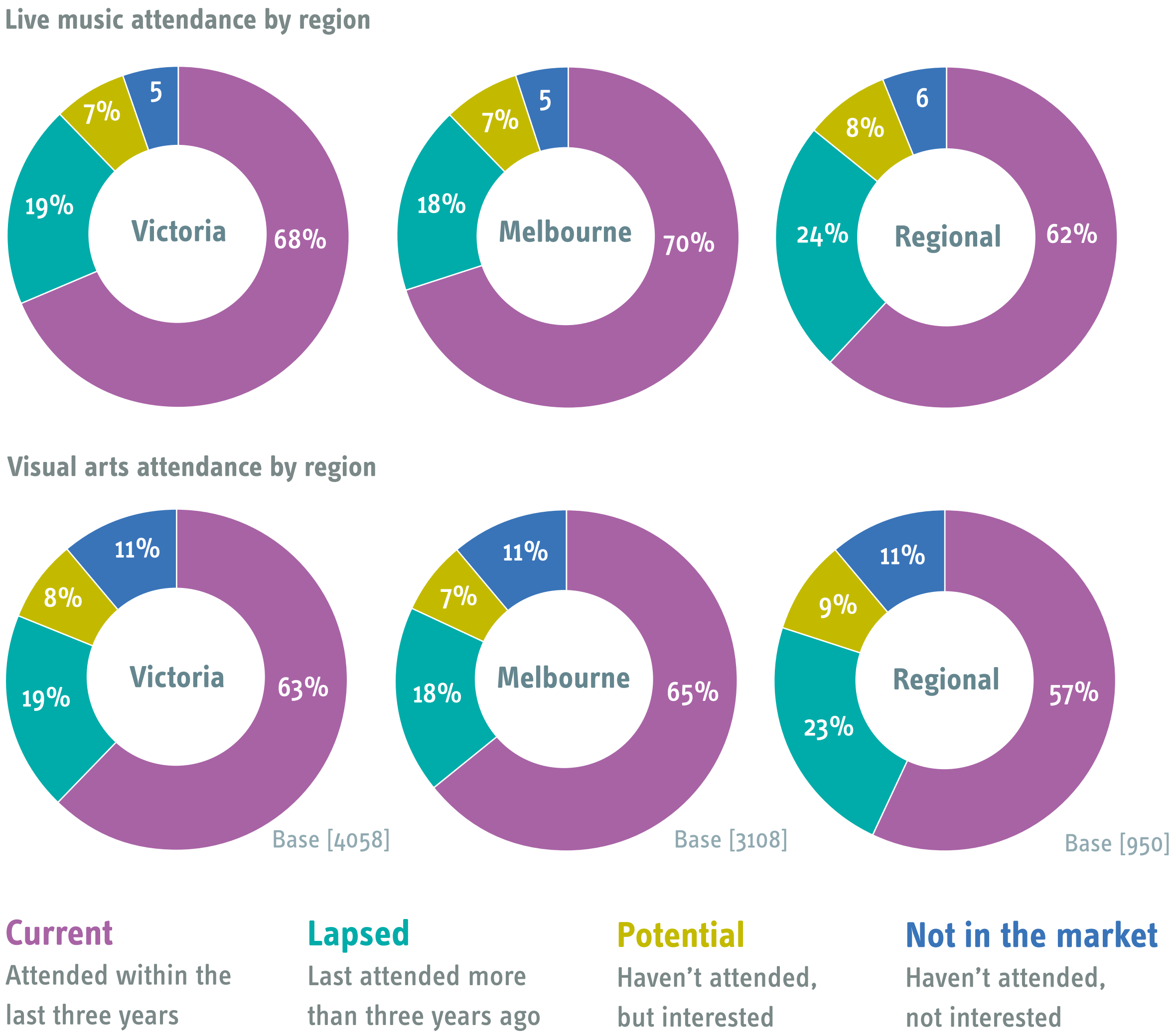
Lower engagement outside of Melbourne

The majority of the culture market are 'engaged', having attended between three and eight artforms in the last 3 years (69%). A further 1 in 5 have 'low engagement' (in the current market for three or fewer artforms), and 14% are in the current market for nine or more artforms. This pattern is broadly comparable across the state, particularly the proportion of 'engaged'. However, the differences lie in the extreme ends of the spectrum: those who live in regional Victoria are significantly more likely than average to have 'low engagement' at 24%, and those who live in Inner-Melbourne are significantly more likely to be 'highly engaged' at 19%. This may suggest the propensity to do more and engage with more artforms has a relationship with location; it could either reflect the demographic profile and life stage of these areas or could be reflective of availability.

Across the 12 core artforms, there is a strong pattern where those who live in Melbourne are more likely to be in the current market than those who live regionally.

This is the case for all core markets, with the only exception being the craft market, where 39% of regional Victoria are in the current market compared to 36% in Melbourne. This is consistent with the 2014 findings, where craft was also the only market with a greater proportion of regional Victoria than Melbourne.

Those living regionally were also much more likely to be in the lapsed market for the majority of artforms, suggesting that although they might not actively engage in particular artforms now, there may be latent interest to tap into. Regional Victoria was much more likely to be in the lapsed market for live music, visual arts and museums than the overall average.



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