



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 3

Western Australia Snapshot

Audience Outlook Monitor,
September 2020



GOVERNMENT OF
WESTERN AUSTRALIA

Department of
Local Government, Sport
and Cultural Industries



Summary

Phase 3 of the Audience Outlook Monitor in Western Australia (WA) reveals that more than half (57%) of WA audiences have returned to cultural events recently, as more venues and facilities have reopened, compared to 33% in July 2020.

More WA audiences are making plans to attend a live performance (37%, up from 23%) and buying tickets for shows (24%, up from 17%). Lead times are shorter than they were in May or July: more than half (58%) of ticket buyers are purchasing tickets for events this month (September).

WA audiences are signalling similar or higher levels of confidence about public interaction compared to July, such as using public transport (81%, up from 65% in July) and eating at a local restaurant (98%, stable with 96%).

Although WA audiences are increasingly confident about returning to events, venue safety continues to be important. Compared to May 2020, slightly more WA audiences would be encouraged to attend if face masks were mandatory (46%, up from 33%) and support is steady for temperature checks upon entry (62%, stable with 61%). Commentary from survey respondents indicates that when attending events in future, some will prioritise venues that take preventative measures seriously.

When considering future attendance, a slightly greater proportion of WA audiences rank outdoor venues as their first preference (50%, up from 44%), where there is enough lawn space to spread out.

On average, digital programs are ranked the least preferred option for WA respondents (21%, down from 27%) as more people look forward to attending indoor venues with fixed seating arrangements. However, although participation in most online experiences has dropped slightly, 60% continue to participate this way. Many (44%) of those online are participating more often than before the pandemic, and the proportion of those who plan to continue doing so after the pandemic has increased, from 72% to 80% — the highest nationally.



Introduction

This Western Australia (WA) Snapshot Report identifies insights from 1,400 survey respondents connected with WA 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.

Read on for the key Phase 3 findings for WA.

Current conditions

WA audiences are among the most confident with public interaction

In September 2020, levels of comfort participating in public events vary markedly around Australia, based on rates of community transmission. WA audiences are appearing to navigate public places the most confidently, on average, along with those in the Northern Territory (NT), Tasmania (TAS) and South Australia (SA).

Compared to July, more activities are now viewed with a similar, or a slightly higher level of confidence, such as using public transport (81% feel comfortable, up from 65% in July 2020) and flying domestically on a commercial airline (55%, up from 50%).



WA audiences are also exhibiting similar or slightly higher levels of comfort with exercising at a gym or fitness studio (76% feel comfortable, up from 73% in July) and eating at a local restaurant (98%, stable with 96%), potentially because these settings are sources of community transmission elsewhere in Australia.

Returning to events

More than half of WA audiences have returned to a cultural event recently

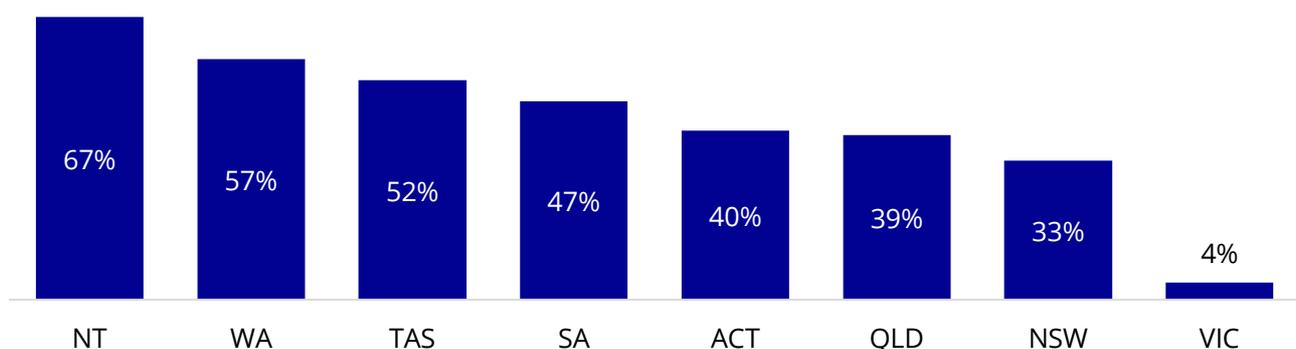
The proportion of WA audience members who attended a cultural event, of any kind, in the past fortnight has increased from 33% in July to 57% in September, as more venues and facilities reopen in WA.

The most common venues that people are reattending are cinemas (23%, up from 12%) and museums and galleries (20%, up from 13%) which are currently the most common types of facilities to be open consistently.

Rates of attendance at live performances have grown significantly since July (20%, up from 7%), due to more events returning to stages and venues. There has also been a notable growth in attendance at lectures, artist talks and workshops (18%, up from 7%) and fairs and festivals (8%, up from 2%).

Figure 1 displays the proportion of audiences who have attended a cultural event recently in each state/territory.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)?
By state/territory of participating organisations.



As performances return to venues, more people are buying tickets

In WA, more past attendees are making plans to attend an event of some kind in future, increasing from 54% in July to 67% in September 2020. By comparison, in New South Wales (NSW), Queensland (QLD) and Australian Capital Territory (ACT), where more restrictions are in place and uncertainty about community transmission is more prevalent, around half of audiences are making plans.

In terms of artforms, the proportion of WA audiences making plans to attend a live performance has grown the most strongly in the past two months, with 37% planning for this right now, up from 23% in July.

The proportion who are buying tickets has increased from 17% to 24%, and more than half (58%) of ticket buyers are buying tickets for events this month. The proportion who spent more than \$50 on tickets has also grown from 19% in July to 29% in September.

Attitudinally, WA audiences are increasingly confident about re-attending cultural venues and events

In September 2020, results show that 40% of past attendees in WA are 'ready to attend cultural events as soon as permitted', an increase from that observed in May 2020 (25%) and July (37%). Currently, WA are among the most 'ready' nationally, along with audiences in the NT (42%) and Tasmania (40%).

As summer approaches, there has been an increase in the proportion of WA audiences who are at least somewhat comfortable to attend outdoor events (89%, up from 81%), including an outdoor music festival with no seating (62%, up from 54%), a street market or fair (91%, up from 87%) and a performance in an amphitheatre (92%, up from 86%).

The proportion who feel comfortable with various types of indoor venues has also increased since July, such as stadiums (65%, up from 54%), large theatres and concert halls (84%, up from 73%) and comedy clubs or live music venues (58%, up from 52%).

WA audiences are showing stronger levels of comfort with venues of all sizes, including those seating 250 people (78%, up from 67%), 500 people (64%, up from 54%) and 1000 people (52%, up from 42%).



Further probing about social distancing in Phase 2 showed that different social distancing arrangements would also have a greater effect on attendance. Currently, 97% of WA audiences would be at least somewhat comfortable to attend venues with 4 square metres per person enforced, and 90% under a scenario of 2 square metres per person. This drops to 33% with no social distancing at all, which is the largest proportion of audiences in any state/territory.

Nation-wide, WA audiences are the least supportive of the use of face masks

In May 2020, face masks were a polarising issue nationally, while a significant proportion of WA audiences (30%) felt mostly discouraged by their use when attending cultural events.

Now, in September 2020, support for face masks has increased (46%), however WA audiences are the least supportive of their use nationally, along with audiences in SA (49%) and TAS (55%). In contrast, support for face masks is strongest in Victoria (VIC) (88%) and NSW (80%), where they have been more widely adopted and enforced in light of recent outbreaks.

Compared to face masks, one safety measure with stronger levels of support in WA is temperature checking upon entry to venues. Two-thirds (62%) say this would make them more comfortable, which is consistent with results in May 2020 (61%).

Future attendance

WA audiences are the most favourable to events in outdoor spaces

Again, in Phase 3, audiences were asked to rank their preferred setting for attending a cultural event today, from a list of four options.

WA audiences continue to show the most support for outdoor venues with lawn space to spread out. The proportion who put this as their first choice has increased since July (50%, compared to 44% in July), and remains the top preference for WA audiences, on average. As summer approaches, preference for outdoor events has also grown elsewhere in Australia, such as in TAS (up 20%), ACT (up 8%) and VIC (up 7%).

One-quarter (25%, stable with 23% in July) of WA respondents ranked an indoor, 100-seat venue following social distancing guidelines highest, and just 6% (stable with 5%) selected an indoor, flat-floor venue with loose chairs and plenty of space to spread out as their first preference.

Compared to July, fewer people rank live-streamed digital program as their first preference (21%, down from 27%) and after considering second and third preferences, this option is now the least preferred option for WA respondents, on average.

WA audiences are eager to show their support for artists and creatives

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?'

Many WA respondents say they want to continue attending events as 'normal', as long as community transmission is prevented by safety precautions. As one person shared,

'I will attend any venue or event that appeals to me so long as there is no community spread of the virus and appropriate measures for the current circumstances are adhered to'.

Another person agreed, commenting,

'I'm more likely to attend events where I believe the pandemic is being taken seriously. We're in an enviable position in WA, but we aren't in the clear'.

Outdoor venues are being prioritised by many WA respondents, as this type of setting feels safest. As one said,

'A gradual approach - outdoor venues first, followed by indoor regulated ones'.

While venue safety will be an important factor driving attendance decisions among WA audiences, there is also a desire to support the artists and cultural organisations hardest hit by the pandemic. One respondent said,

'The pandemic has heightened the importance of the arts to me. I will try to go to more events to support the arts'.



Another respondent shared that they will prioritise local talent, commenting,

‘I will go help support the local talent over big corporations, for they have been hit the hardest’.

WA audiences are among the most optimistic about returning to events long-term

In May 2020, 15% of WA audiences said their future attendance will be negatively affected by the pandemic long-term. This increased to 20% in May and has remained relatively stable in September (18%).

Nationally, WA audiences are among the least likely to anticipate that their attendance will be negatively affected by the pandemic, along with audiences in NT (16%) and TAS (19%), where audiences are reporting a sense of relative normalcy after months with zero or only small numbers of cases. By comparison, the largest proportions of audiences saying their attendance will be negatively affected are in VIC (25%) and NSW (21%), where audiences are feeling uncertain about the likelihood of future outbreaks.

When they do return to cultural events, most WA audiences expect to spend the same amount on tickets and subscriptions as they did before (78%), 13% expect to spend less (down from 16% in July) and 10% expect to spend more (consistent since July).

Participating at home

WA audiences remain engaged with creative activities at home, both on- and off-line

Past attendees in WA are continuing to participate in creative activities while at home, such as listening to music (91%) and reading for pleasure (86%).

Smaller, but consistent, proportions are making art or craft (42%, stable with 42% in July), and making videos or doing photography (23%, stable with 21%) and making music (26%, stable with 24%).

Slightly fewer WA audiences are participating in online arts or cultural experiences (60%) compared to the proportion in July (68%) and May 2020 (72%). Nationally, WA audiences are among the least likely to be engaging in online arts and culture



activities right now, along with audiences in NT (60%) and SA (61%), potentially due to live experiences becoming increasingly available as restrictions have eased.

Engagement in most online activities has dropped slightly in WA

In WA, participation in most online arts and culture activities has dropped slightly, including the proportion doing online classes, courses, and tutorials (25%, down from 28%) and seeing virtual exhibitions and tours (11%, down from 15%).

Across the country, the most consistent levels of participation have been in online video of performances and events, although this has generally decreased as more venues reopen. In WA, 35% are watching pre-recorded performances online (down from 46% in July) and 26% are watching live-streamed performances (down from 33%).

When asked if they, or anyone they know, has discovered a new artist, artwork, or performance online, 25% of WA audiences say they themselves have made a discovery in the past fortnight (down from 28% in July) and 15% say they know someone who has (stable since July).

Further, when asked if they are doing online arts and cultural activities more or less frequently than before the pandemic, 44% say they are engaging online more frequently, which has decreased slightly from 49% in July.

WA audiences in inner regional locations are more likely to be engaging online (67%) than audiences in Perth (59%) or outer regional locations in WA (55%). Inner regional WA audiences are also more likely to be engaging online more frequently than before the pandemic (50%), compared to Perth audiences (43%) and outer regional WA audiences (46%).

Interestingly, the proportion who plan to continue engaging online post-pandemic has increased among WA audiences (80%, up from 72% in July), indicating that long-term digital programming will be important for some audiences, even while live events resume.

WA audiences are continuing to pay for online experiences, but are not necessarily spending more

The data shows that the market for digital offerings in WA is steady or growing, in line with trends nationally.

When asked if they have paid for an experience online, 29% of WA respondents said they have, consistent with the proportions in May and July (both 30%). A similar proportion are making donations for online experiences (15%, stable with 17% in May), and subscribing to digital platforms (8%, stable since May). A slightly larger proportion are purchasing single experiences (12%, up from 9% in May).

Spending on online experiences has decreased slightly in WA, with 34% having spent more than \$50 in the past fortnight, compared to 38% in July, and is now consistent with May results (33%).

When asked to describe what they'll prioritise when spending online in future, WA shared feelings of goodwill, with many expressing that they would like to show support directly to artists. One person commented,

'Would like to support streaming where performers are the main beneficiary'.

Another agreed, explaining,

'[I'll] try to prioritise avenues of support for artists (across all mediums) that take the least cut, i.e., allow the artist to receive as much as possible from the proceeds'.

Others shared that they will be seeking more affordable, or low-cost online experiences. One person explained,

'During the pandemic, my priorities were based on how much spare money I had (that would have been going to theatre or music events had they been on) and it was usually spent on artwork by online creators. I intend to continue this as long as I have that money available'.

One person expressed a desire to support social causes that are important to them, commenting,



'I would prioritise charity events and want to donate my money to good causes. I would prioritise performances that raise awareness about important subjects. I would also prioritise drag queen events as I enjoy supporting drag artists boosting their confidence even though many shows can't take place at the moment. I would prioritise events related to the LGBTQI scene'.



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.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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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