



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR.



Western Australia Snapshot

Audience Outlook
Monitor, May 2020



GOVERNMENT OF
WESTERN AUSTRALIA

Department of
Local Government, Sport
and Cultural Industries



Summary

The findings of the Audience Outlook Monitor in Western Australia (WA) suggest a cautious but increasingly positive outlook for live events: 25% say they are ready to attend as soon as restrictions are lifted, compared with 22% nationally.

Audiences in the State are slightly more positive about attending different types of events, compared to the national average, though most are not ready to attend large venues or crowded spaces. Across all types of events, venue safety measures are seen as critical, though some WA audiences would be put off by face masks – more so than in other parts of Australia.

WA audiences of all age groups are highly engaged online, in line with national participation rates. There is also evidence that digital streaming has enabled WA audiences to discover international works, and global audiences to experience WA work.

Comments from audiences in regional areas confirm the value of streamed events in enabling access to a wider variety of works. Regional audiences in WA are more likely to have paid for an online arts experience, compared with metropolitan audiences.

Introduction

This WA Snapshot Report identifies insights from 2,769 survey respondents connected with WA organisations participating in the Audience Outlook Monitor. The Audience Outlook Monitor is tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Baseline data was collected in May 2020 in a cross-sector collaborative survey process involving 23 WA arts and culture organisations, including museums, galleries, performing arts organisations and festivals. These organisations (totalling 159 nationally) simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event since January 2018. Read more about the methodology and the types of events that are included.

Data from over 23,000 respondents nationally 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 all participating organisations, this study provides a detailed resource with



insights about all different artforms, types of events and demographic groups in all parts of Australia.

Find out [how to use the dashboard](#) to access results relevant to you, or read below for the key findings about audiences in Western Australia.

Returning to events

WA audiences are increasingly positive about returning to arts and culture events

- ▶ Overwhelmingly, WA audiences plan to return to arts and culture events in the future (90%), with 78% planning to attend just as they did in the past and 6% plan to attend more often.
- ▶ On average, 25% of audiences are comfortable attending as soon as restrictions are lifted, which is slightly more than the national average (22%). While 65% will attend when they deem the risk of transmission to be minimal, 10% won't be back until there is no risk at all.
- ▶ The results show that the pandemic will affect who comes back when, the types of events they attend, and the size of events that they feel comfortable with. A few say that they want to choose more light-hearted programs, or works that help make sense of the pandemic, when venues re-open.
- ▶ The vast majority agree they will be most interested in the same types of events they used to attend (92%). Read on for more information about who will be back and when.

Subscribers and people who feel strongly committed will be back sooner than others

- ▶ Some groups in WA are more likely to attend as soon as restrictions are lifted. This includes:
 - People who feel strongly committed to supporting arts and culture organisations (41%), compared to the State average of 25%
 - Subscribers to performing arts organisations (40%)



- People who previously attended the performing arts more than once a week (32%).
- ▶ In contrast, the groups that are more likely to stay away until there is no risk at all include:
 - Those aged over 65 (12%) and over 75 (17%).
 - People who are not in the labour force unemployed (14%), retired (15%) or not in the labour force (14%).
 - Audiences for organisations based in regional/remote areas (12%).
 - One WA respondent explained, 'I'm so torn about this - the arts and performance is really important to our family (attending shows, festivals and being involved in community theatre). But I'm not comfortable being around groups of people at the moment and I think I'd really struggle to enjoy a performance... under the current circumstances.'

Safety measures like hand-sanitiser will make a difference for some attendees

- ▶ There are a wide range of views about public health measures, and whether safety measures are essential or excessive, but overall WA audience views about venue safety are consistent with the national average.
- ▶ Most WA audiences would generally feel encouraged by safety measures like disinfecting public areas (88%) and providing hand sanitiser (88%). There is also general support for social distancing measures, and most would be encouraged to attend if patrons were seated apart according to social distancing guidelines (82%).
- ▶ In WA, like in other parts of Australia, respondents with a disability (99%) and, respondents aged 65 to 74 (97%), and people who are particularly vulnerable to a bad outcome from contracting the virus (97%) are most likely to say that safety measures would positively influence a decision to attend.
- ▶ However, some measures may be polarising with a proportion saying they would actually be discouraged if they had to wear a face mask (33%) or have mandatory temperature checks at entry (13%). Audiences in WA are more likely to feel discouraged by face masks, compared to the national average (27%).



- ▶ Overall, 96% of WA respondents say that venue safety measures will positively impact their decision to attend. One person shared their view, 'Being immune deficient, I'll be very wary of attending gatherings of people who I don't know. It's very sad that there still continues to be people who don't practice safe distancing or personal preventative hygiene. Fingers crossed for a safer future at the soonest.'

Shows and performances

WA audiences are not ready to return to large performance venues

- ▶ Although WA audiences are slightly more confident than other Australians about returning to events, audiences' comfort-levels largely depend on the size of the venue and density of crowds.
- ▶ Even if they were open, and following recommended safety guidelines, 16% of WA audiences say they would be 'very comfortable' attending a venue seating 100 people today, and 30% say they would be 'somewhat comfortable'. The level of comfort is higher for respondents who are unemployed (19% 'very comfortable').
- ▶ Just 8% would be 'very comfortable' at venues seating 1,000 or more, which is comparable with the national average (7%), and less than the proportion that would be very comfortable flying domestically on a commercial airline (10%) right now.
- ▶ One WA respondent explained, 'I want the local artists to keep performing in Perth. The Festivals are so important and bring Perth alive. I want that to continue and we need to support the local acts to keep that alive'.
- ▶ Smaller venues of 50 people or less are the most likely to attract audiences in the near future, with 65% of WA audiences saying they would be at least somewhat comfortable attending today, if they were open and following relevant guidelines (compared with 62% nationally).
- ▶ Outdoor programming may be viable sooner than indoor programming, with a greater proportion of audiences feeling comfortable attending an outdoor festival or event at present (71% in WA and 64% nationally). Audiences of regional and remote arts organisations (79%) are more likely to feel comfortable attending outdoor events than metropolitan audiences (71%).



- ▶ As is shown in the national data, only small numbers of WA audiences are actively making plans to attend live shows or performances in the future (14%), and among those that are buying tickets, the largest proportion are doing so for events in January 2021 or thereafter (50%).
- ▶ Among ticket buyers, those who have experienced financial hardship from the pandemic are planning to attend later, with a majority (59%) purchasing tickets for January 2021 or later, compared to 46% who have not experienced financial hardship.

Exhibitions

- ▶ WA audiences would largely be comfortable visiting museums and galleries, but not using interactive exhibits
- ▶ The outlook for museums and galleries is looking positive nationally, and most WA audiences say they would be at least somewhat comfortable walking around a museum or gallery (93%) or visiting a community art space (86%) today, if they were open and following recommended safety procedures.
- ▶ Among frequent museum-goers and respondents under 35 the numbers that feel comfortable visiting museums are even higher (97% and 95% respectively).
- ▶ WA respondents who are retired are less likely to feel 'very comfortable' walking around a museum or gallery (39%) than those who are employed full-time (54%).
- ▶ However, few WA audiences, of any age, would feel comfortable using hands-on exhibits at a museum (27%), confirming the need to rethink visitor experience design while health risks remain.

Creativity at home

Many WA respondents have taken up creative hobbies in isolation and most plan to continue after the pandemic

- ▶ Many WA respondents are being creative at home more frequently than before the pandemic (43% compared with 46% nationally), and a high proportion of those being more creative are planning to continue doing so after the pandemic (90%).



- ▶ Even among those who rarely attend arts events, a sizeable proportion (40%) are doing creative activities more frequently. One person shares that they have had more time for creative pursuits: '[I] resumed music practise that [I] have not done for many years. [I am] also using the time to engage directly with my kids, to introduce them to, or practise with them, a wide range of creative pursuits.'
- ▶ On average, 5% say they are doing creative activities less frequently, and one person explains, 'I am an essential worker so haven't been spending increased time at home.'
- ▶ Reading for pleasure and listening to music are common ways people are engaging with art and culture at home, but many audiences are also doing things like making art or craft (45%), making music (25%), making videos or doing photography (21%) and creative writing (17%).
- ▶ When asked to share an example, many say that they've had a chance to resume long-forgotten hobbies, or finally had time to progress a creative project. One WA respondent said, 'After an interval of some years I went back to drawing lessons which my previous teacher now provides on line. I have got out my sewing machine and made masks for a homelessness service provider.'
- ▶ Another WA respondent shared, 'I started writing songs and am thinking about recording some of them and doing live gigs after the pandemic. This was in part facilitated by taking up piano lessons just before the pandemic started and then being able to continue them over video calls.'

Online engagement

Three-quarters of WA respondents are participating in arts and culture online

- ▶ WA respondents are highly engaged with arts and culture online, although slightly fewer are participating in this way compared with the national average (72% vs 75%).
- ▶ WA audiences are commonly watching arts video content (50%), watching live-streamed events (37%), or doing online classes or tutorials (33%).
- ▶ Online participation is occurring in all age groups in WA: 53% of audiences aged over 75 have watched a pre-recorded performance in the past fortnight, similar to the proportion of under 35s (55%).



- ▶ Some WA respondents shared online experiences of global collaboration between colleagues, 'An online music recital between a mentor in California, a friend from the Solomon Islands, a teacher in Sydney and students from around Perth and the South West of WA. No matter where in the world we are, we can share a love of music and learn from each other!'
- ▶ Many WA audience members (35%) say they are doing online arts and culture activities more frequently than before the pandemic. Among those who frequently attend the performing arts, this rate is even higher (55%).

Online participation is allowing WA audiences to discover new works

- ▶ Interestingly, one-third say they are motivated to engage online for their own mental wellbeing (36%), while others say they are engaging online to support an artist or organisation they think is important (39%) or to see things that they wouldn't normally be able to see (33%), which is similar to the national picture.
- ▶ Confirming the audience development potential of this time, one-third (29%) have discovered a new artist, artwork or performance online, or they know someone who has (11%). Online discovery is particularly high in under 35s in WA (53%) and frequent performing arts attendees who usually attend weekly or more (44%).
- ▶ Several WA respondents shared examples of exploring new works for example, '[My] daughters looking at items online have discovered new singers & music & also artists drawing online.'
- ▶ Online discovery is also higher among audiences of metropolitan WA arts organisations (30%) compared with regional audiences (24%). One regional respondent said, 'I have seen the opera Madam Butterfly and I would never be able to go and see that live unless it was in Perth. I loved the humming chorus and I wish that I would be able to play it'.
- ▶ Digital streaming has opened up possibilities for WA audiences to experience global works, as one said, 'I've [had] the opportunity to experience livestreams and online performances from interstate or overseas which I would not have had the opportunity to do previously prior to Covid-19.'

Digital distribution will continue to play a role for WA audiences after the pandemic

- ▶ Among those in WA who are participating online more frequently than they used to, most (70%) think they will continue doing so when the pandemic is over, suggesting there will be a long-term role for digital distribution of cultural content.
- ▶ The intention to continue participating online is higher among some groups, particularly those who are caregivers to older adults (77%), audiences of Galleries, Museums, Libraries and Archives (72%) and respondents aged 65 to 74 (71%). It is weaker among audiences who usually attend performing arts events once a week (67%), suggesting that frequent attendees may return to their usual patterns, at least to an extent.
- ▶ Only 27% of regional WA audiences are participating online more frequently than before the pandemic, compared with metropolitan audiences (40%). However, 71% of regional WA audiences are more likely to continue participating online after the pandemic ends compared with metropolitan audiences (66%).
- ▶ Online participation has encouraged many people to continue discovering new experiences. For instance, one WA respondent said, 'With the extra time and loss of artistic input, I have surfed more than I ever have and found new and long-established artistic sites. Ranging from the boring and badly done, to truly amazing and creative. I will continue even after we are all vaccinated.'
- ▶ Some WA respondents say that after the pandemic, they would like a choice of attending in-person or watching a livestream (30%). WA respondents with a disability (43%) and those with children under the age of six (33%) are more likely to want this option available, confirming the role for digital platforms in expanding access to the arts.

The WA market for digital work could be developed further

- ▶ In WA, most audiences engaging online say they have not paid for any online arts or culture experiences in the past fortnight (70%), though a significant minority have paid (30%).



- ▶ WA respondents are less likely to have paid for an experience compared to the national average (34%), suggesting there may be an opportunity for market development.
- ▶ Regional WA audiences (74%) in particular are more likely to have paid for online arts experiences than metropolitan audiences (65%), indicating that digital work has played a critical role in arts engagement for this segment.
- ▶ One respondent shared, 'A lecture a good friend was giving about opera, which would have only been available to people in Perth, was attended by their colleagues from around the world. New realizations of how small the world can be..'
- ▶ Among those that have paid for an online arts experience nationally, 36% have spent more than \$50 in the past fortnight (33% in WA). Nationally, older audiences between 65 and 74 have spent the most (50% have spent over \$50), while under 35s have spent the least (16% have spent over \$50).
- ▶ While regional WA audiences more likely to pay for online experiences than metropolitan audiences, they are spending less per fortnight (30% compared with 37%).
- ▶ Two-thirds of those in WA say they are at least somewhat likely to pay a small amount for access to digital programs in the future – suggesting there is room to grow, though again this proportion is below the national average (63% relative to 68% nationally).
- ▶ At this point, the most common form of payment has been via donation, with smaller proportions paying for a single online pay-per-view event or purchasing an ongoing subscription for an arts platform. It is estimated that rates could change as the pandemic goes on, and there will be measures to watch closely in future data collection phases of this study, planned for July and September 2020.
- ▶ Nationally people are experiencing a variety of barriers to engaging online. Most commonly WA respondents report that they generally don't know what is on offer (38% compared with 35% nationally) suggesting there could be a role for greater investment in content discovery and digital marketing. A similar proportion say they simply have other priorities for their time (37% in WA vs 34% nationally).



Support

WA audiences want to support arts and culture through the pandemic, but not everyone feels able to financially

- ▶ Most audiences surveyed in this study (who are recent attendees of cultural organisations) say they are moderately (55%) or strongly (35%) committed to supporting arts and culture organisations, though some people note that they feel like they are not in a position to do so financially right now.
- ▶ One respondent in WA shared, 'Would like to support and do enjoy but a lot of uncertainty as to job security. You can only do what you can afford to do.'
- ▶ Some respondents note a connection to the sector in some way, through friends, family, or their work. It's perhaps then unsurprising that respondents say they are more likely to donate to a specific artist or organisation that is important to them (67%), rather than a general sector support fund (51%).
- ▶ There is a segment who would be willing to participate in other forms of support, like buying vouchers that can be redeemed for future programs (69%) or buying merchandise such as clothing, books and gift items (56%).
- ▶ Artists and cultural organisations can use the [dashboard](#) to see what demographic groups are most likely to participate in different forms of support and identify audience segments to develop new offers for.
- ▶ In terms of organisations' communications with audiences, WA respondents are most interested to hear about plans for future live events, post pandemic (50%), and notices about upcoming online events and digital offerings (50%). These tend to rank higher than general communications about how organisations are faring.

What's next

To explore the data in more detail and find out how audiences for your work are responding, visit the [dashboard](#). Instructions and tips for using the dashboard are available in a short [video](#).



In the coming weeks, more Fact Sheets will be released, to provide you with insights about key regions, artforms and topics. You can also expect tips and practical steps to apply the findings in your work.

To receive future snapshots, fact sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news directly from the researchers [here](#).

If you have a question, or an idea to put forward, relating to this study, you can contact info@thepatternmakers.com.au.



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