



2023 Arts & Culture Monitor Survey

Prepared for:

Department of Local Government, Sport and Cultural Industries

Prepared by:

CATALYSE[®] Pty Ltd

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1 Executive Summary

Arts and culture continue to be of high importance to the community.

86% agree

the Western Australian Government should invest in arts and culture to ensure they are available to the public

93% agree

it is important for school children to have access to arts and culture as part of their education

Perceptions of individual and community value remains high.

When asked 'how valuable is the role of arts and culture in your life', the value index score is 67 out of 100.

- The value index score has remained steady over the past five years.
- Personal value is highest in Perth's western suburbs and lowest in the Goldfields-Esperance region.
- Perceived value is lower among males and those with a child aged 0-5 years.
- Personal value increases with level of education.

Arts and culture have a valuable role in the community with a value index score of 78.

- The value index score has remained steady over the past five years.
- Community value is highest among Aboriginal and Torres Strait Islander people, and females.
- By location, perceived value is highest in Perth's western suburbs and the Wheatbelt region. It is lowest in the South West region.

Most people believe the arts benefit the broader community, not just those who participate.

21% agree that 'the arts only helps those people who participate, not the broader community'.

- The agreement index score is 38, up 2 points from last year.
- Females, and people who live in the Pilbara region and Perth's western suburbs are less likely to agree. They are more likely to think the arts does help the broader community.

Most people believe arts and culture contribute to WA's sense of community and identity.

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA', the value index score is 73, an increase of 2 points over the past 12 months.

- The value index score is higher among those who mainly speak a language other than English at home.
- By location, the value index score is highest in the Wheatbelt region and Perth's western suburbs. It is lowest in the Pilbara and Gascoyne regions.

When asked 'how valuable is the contribution of arts and culture to the identity of the state', the value index score is 72, a decrease of 1 point over the past 12 months.

- The value index score is highest among Aboriginal and Torres Strait Islander people, those who mainly speak a language other than English at home, and people with disability.
- By location, the value index score is highest in the Wheatbelt and Gascoyne regions. It is lowest in the Goldfields-Esperance region.

The arts continue to make people feel good.

The agreement index score is 78, on par with recent years.

- Level of agreement is higher among people with a bachelor's degree or higher.
- By location, perceived value is highest in Perth's western suburbs, followed by the Wheatbelt region. It is lowest in the Goldfields-Esperance region.

Easy access to arts and culture for most, but the gap between metro and regional WA remains.

The ease of access index score is back to a high of 68, with marginal increases of 1 point per year over the past two years.

- It is easier to access arts and cultural activities in Perth's inner and western suburbs and most difficult in the Gascoyne and Pilbara regions.
- Ease of access improves with higher levels of education and income and is more difficult among those with disability or impairments.

Annual participation in the arts is recovering post COVID-19.

78% of respondents participated in an arts and cultural activity over the past 12 months, up by 4% points.

- After falling to a low of 73% participation in 2021 following the introduction of COVID-19 restrictions, participation rates are moving up.

Frequent participation, where respondents attended activities at least once a month over summer, is more common in Perth's western and inner suburbs and increases with higher levels of education and income.

- Age appears to be a barrier for attendance, with participation rates dropping after the age of 55 years.
- In the regions, frequent participation is highest in the Pilbara region and lowest in the Gascoyne region.

Interest in the content remains the main motivator for participating in arts and cultural activities.

Motivators vary across different groups in the population.

- Older people are most likely to be motivated by their interest in the content, while younger adults and families with children aged 0 to 17 years are more likely to be motivated by having fun.
- Aboriginal and Torres Strait Islander people and people born overseas share a primary driver of being interested in the content; however, secondary drivers vary. People born overseas are more likely to be motivated by experiencing new things and having fun, while supporting the cultural world is more important for Aboriginal and Torres Strait Islander people.
- The primary motivator for people who mainly speak a language other than English at home is interacting with family and friends.
- Respondents earning more than \$150,000 are mainly motivated by experiencing new things, interacting with family and friends, and having fun. Respondents in lower income brackets are most likely to participate in arts and culture activities because they are interested in the content.

Government and corporate support are considered to be essential for the arts.

Only 18% of respondents agree with the statement 'all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone'.

- People who live in Perth's western suburbs and the Kimberley region, those with higher levels of education and females are more likely to disagree that arts companies should rely on ticket sales alone.

81% of respondents would be prepared to contribute more money to expand provision of and access to arts and culture.

- 54% of respondents believe the Western Australian Government's allocation of \$2.12 per person per week for arts and culture is too low.
- 46% of respondents would be prepared to pay more than \$2 extra per person per week. A further 35% would be willing to pay up to \$2 more per week.

The perceived value of the WA film and television industry remains high.

74% of respondents rate the value of the film and television industry highly.

- The value index score has remained consistent at 75 over the past 12 months.
- Perceived value is highest among those who live in Perth's inner south suburbs, people with disability, and Aboriginal and Torres Strait Islander people. It increases with age and is higher among people on lower levels of income.

Perceived ease of accessing WA film and TV remains moderate.

Only 40% of respondents consider it easy to access WA produced film and television productions, providing a rating of 4 or 5 out of 5.

- The overall ease of access index score is 54 points, an increase of 2 points over the past 12 months.
- Ease of access ratings are highest among Aboriginal and Torres Strait Islander people, those with an annual income of \$30,001 - \$75,000, among younger adults aged 17-34 years, and respondents with lower levels of education.
- Across WA, it is easiest to access WA film and TV in the Great Southern and Peel regions and most difficult in the Gascoyne and Pilbara regions.

2 Strategic Insights

Five strategic insights are provided for consideration by the Department of Local Government, Sport and Cultural Industries.

Strategic Insight 1

Increase Government investment in arts and culture.

The arts continue to be highly valued and a majority of people believe an allocation of \$2.12 per person by the State Government is too low. Around 81% of respondents would be willing to pay more per week to improve access to arts and culture in WA, with 46% of respondents willing to pay more than \$2 extra per week.

Strategic Insight 2

Develop strategies to increase participation in arts and cultural activities in the regions.

Overall levels of participation and attendance in arts and cultural activities are edging closer to the pre-COVID level of 82% in 2019. This year, 78% of respondents said they had attended or participated in an arts and cultural activity in the past 12 months, up 4% points from last year.

While it is encouraging to see high participation in the Perth metropolitan area at 82% and the Kimberley region at 84%, participation rates remain significantly lower in the Gascoyne region at 48% and Goldfields-Esperance and Pilbara regions, both at 56%. There is a need to improve access to arts and culture across regional WA. The ease of access index score is 72 in the metropolitan area compared to 58 across regional WA, with ease of access ratings significantly lower in the Gascoyne and Pilbara regions.

Strategic Insight 3

Continue to improve access to arts and cultural activities for children.

93% of respondents agree that it is important for children to have access to learn music, arts and crafts, writing, drama, media training etc as part of their education. However, the ease of accessing arts and cultural activities is moderate among families. The ease of access index score is 65 points for those responsible for children aged between 0 and 11 years.

To encourage parents and carers of pre-school and primary school aged children to engage in more arts and cultural activities, foster the creation and delivery of activities that enable children to have fun, experience new things, and interact with their friends and family.

Strategic Insight 4

Develop strategies to make arts and culture activities more inclusive of people with lower levels of education and income.

Consider ways for people with lower levels of education and income to be included in more arts and cultural activities to increase their sense of belonging. These people believe arts and cultural activities play a valuable role in creating a sense of community and a sense of identity; however, only 66% in both cohorts participated in arts and cultural activities over the past 12 months. This compares to 78% of all respondents.

Respondents with lower levels of education and income are more likely to attend if they are interested in the content; can have a new, different and fun experience; and can interact with family and friends in a relaxing, stress-free environment.

Strategic Insight 5

Continue to support and promote the WA film and television industry.

The perceived value of the WA film and television industry continues to be high at 75 index points. It is higher among people with disability (79 points), Aboriginal and Torres Strait Islander people (79 points), and older people (78 points). However, while value is high, ease of access has remained moderate across WA over recent years. It is at 54 index points this year. Although it has edged up by 2 index points, it is significantly below the highest score of 61 points in 2017.

3 The Study

3.1 Summary

Since 2003, the Western Australian Government has conducted an annual Arts and Culture Monitor to track behaviour and attitudes towards arts and culture. The 2023 Monitor was managed by the Department of Local Government, Sport and Cultural Industries (DLGSC) Culture and the Arts division. The study assists DLGSC with Key Performance Indicator evaluation, measurement of public value, and strategic planning.

Once again, the study was conducted using an online survey. 22,994 online panellists were randomly selected and invited to complete an online survey between 27 March and 13 April. Quotas were set by age, gender and location to aim to achieve a representative cross section of the community. To meet all quotas, remaining respondents were recruited by phone. The final sample was weighted by age, gender and location to match the ABS population profile for Western Australia.

1,392 respondents completed a survey. The overall sampling error was reduced to $\pm 2.6\%$ at the 95% confidence interval. In effect, if the survey result is 50%, we would expect the population result to be between 47.4% and 52.6%. As the survey result moves towards 0% or 100%, the sampling error reduces.

Table 1: Summary of the study						
Strategic Purpose	To monitor behaviour and attitudes towards arts and culture.					
Data collection type	Online survey					
Data collection dates	27 March - 13 April					
Sample source	Thinkfield Online Panel					
Total invited	22,994					
Open Rate (% opened)	16%					
Sample Size - # completed	1,392					
Response rate*	37%					
Sampling error	$\pm 2.6\%$ at the 95% C.I.					
Quotas	By age, gender and location to match the population profile					
Weighting by age, gender and region to be representative of the population	Males			Females		
	17-34	35-54	55+	17-34	35-54	55+
Gascoyne	0.798	0.465	0.076	0.265	0.187	0.141
Goldfields-Esperance	4.636	2.702	1.772	0.462	0.419	0.958
Great Southern	1.661	1.161	0.519	0.236	0.293	0.386
Kimberley	0.413	1.686	0.664	0.360	0.283	0.598
Mid West	2.274	1.325	0.745	0.174	0.334	0.626
Peel	1.219	1.066	0.787	0.342	0.368	0.850
Pilbara	-	1.461	1.438	0.263	0.491	1.243
South West	1.208	0.994	1.279	1.805	1.419	0.899
Wheatbelt	1.240	1.032	0.547	6.173	0.728	0.480
Perth	0.833	1.096	1.515	1.316	1.407	1.338

**The response rate is calculated by the number of Thinkfield panellists who completed a survey divided by the number of people who opened an email invitation less screen outs and quota outs.*

Data has been analysed using SPSS.

Please note: throughout this report where sub-totals add to $\pm 1\%$ of the parts, this is due to rounding errors to zero decimal places.

3.2 Sample Profile

The study attracted a diverse and representative group of residents across Western Australia by the following classifications (as shown in Figure 1):

Gender

46% of respondents were male, 54% were female and less than 1% prefer another term.

Age

34% of respondents were aged 17-34 years, 35% were aged 35-54 years and 32% were over 55 years.

Life stage

60% of respondents did not have children living at home. This includes single person households, group households, couples without children and empty nesters. 40% of respondents had at least one child living at home.

Highest level of education attained

29% of respondents had a high school leaving certificate as their highest level of education, 24% had a diploma or advanced diploma, 37% had a bachelor's degree or higher and 10% answered 'other'.

Household income

39% of respondents had a combined household income before tax of up to \$75,000 and 51% were earning over \$75,000. 10% of respondents refused to provide this information.

Disability

14% of respondents were in a household where they or someone they lived with identified as a person with disability or impairment.

Ethnic diversity

29% of respondents were in a household where they or someone they lived with was born overseas, 4% were in a household where they or someone they lived with mainly spoke a language other than English (LOTE) at home and 4% were in a household where they or someone they lived with identified as being Aboriginal and/or Torres Strait Islander.

Location

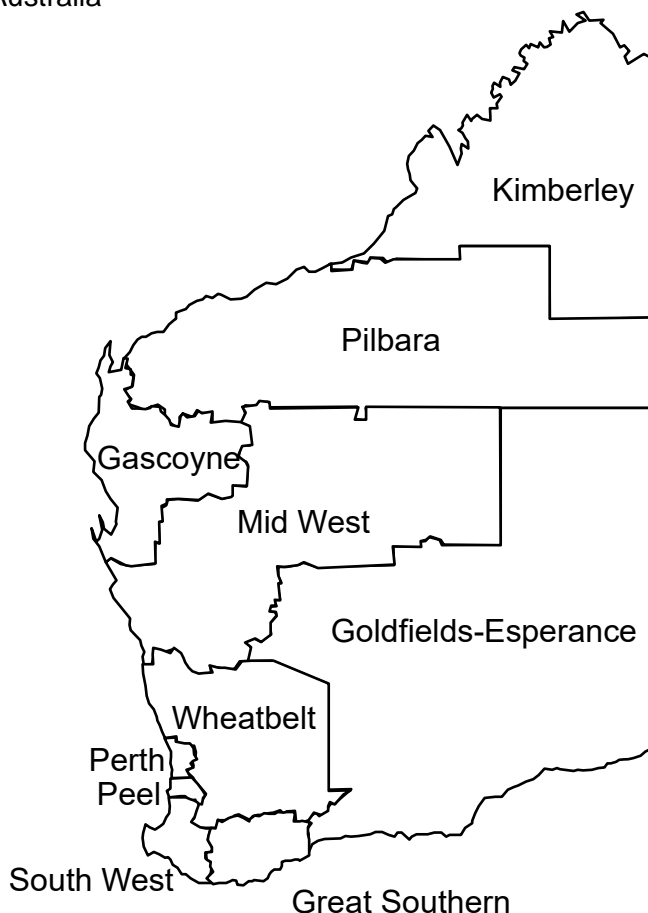
61% of respondents lived in the Greater Perth metropolitan area and 39% lived in regional WA.

Postcodes were grouped as follows:

Western Suburbs:	6008-6015
Inner North:	6000-6007; 6016-6019; 6021; 6029; 6050-6053; 6059-6062
Inner South:	6100-6105; 6151-6154; 6156-6160
Outer North:	6020; 6022-6028; 6030-6038; 6041; 6044; 6054-6058; 6063-6090
Outer South:	6106-6150; 6155; 6161-6206
Regional WA:	6041-6044; 6207-6999

Responses were grouped into ten regions of Western Australia as shown in Map 1.

Map 1: Regions of Western Australia



3.3 Analysis

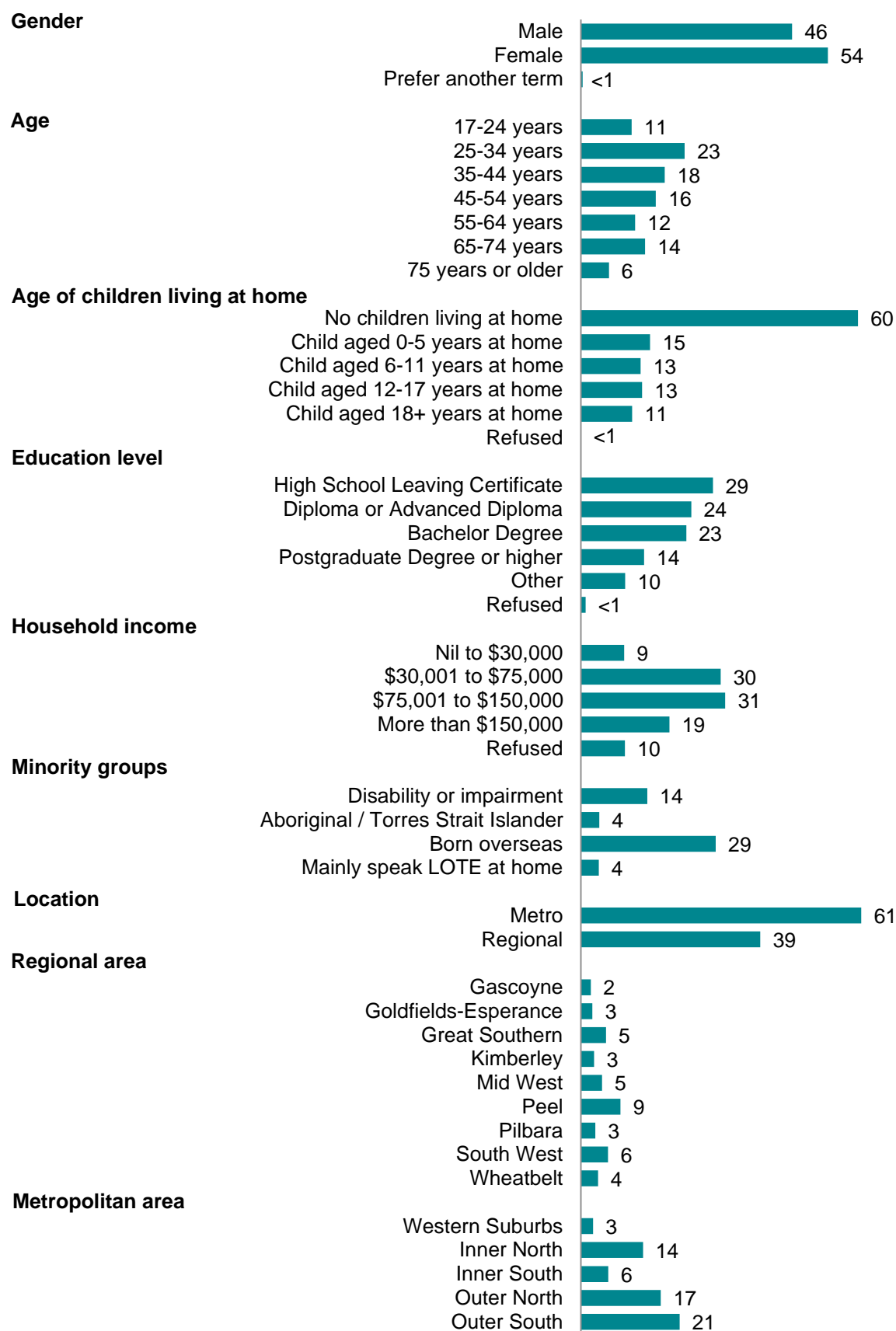
Throughout the report, index scores have been used to show historical analysis and to compare demographic variances across the community. Index scores are used when respondents have been asked to provide an answer on a five point scale such as level of agreement, ease of access and perceived value. The Index Score is calculated and represented as a zero-based score out of 100.

To calculate the Index Score, the survey percentage result is multiplied by an index factor, and the index value for each category is summed. An example is provided in Table 2. Unsure and non-responses are removed from the analysis.

Table 2: Index Score Calculation

Response category	% result	Index factor	Index value
Strongly disagree	2%	0	0
Disagree	3%	25	1
Neither	11%	50	6
Agree	45%	70	34
Strongly Agree	39%	100	39
Index Score (out of 100)			79

Figure 1: Sample Profile
% respondents, unweighted



SURVEY FINDINGS

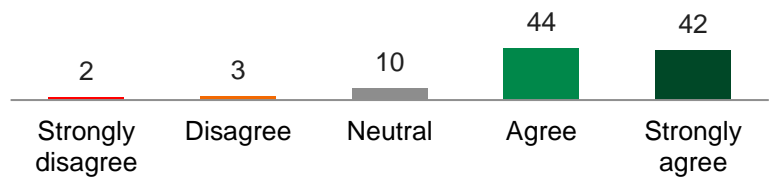
4 The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public

4.1 Level of Agreement

86% of respondents agree or strongly agree with the statement 'The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public' (see Figure 2).

The mean score is 4.2 out of 5 and the Agreement Index Score is 80 out of 100

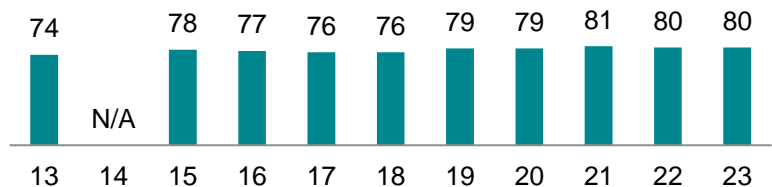
Figure 2: Overall Ratings
% of respondents



4.2 Trend Analysis

The Agreement Index Score has remained high and steady over recent years (see Figure 3).

Figure 3: Trend Analysis
Agreement Index Score

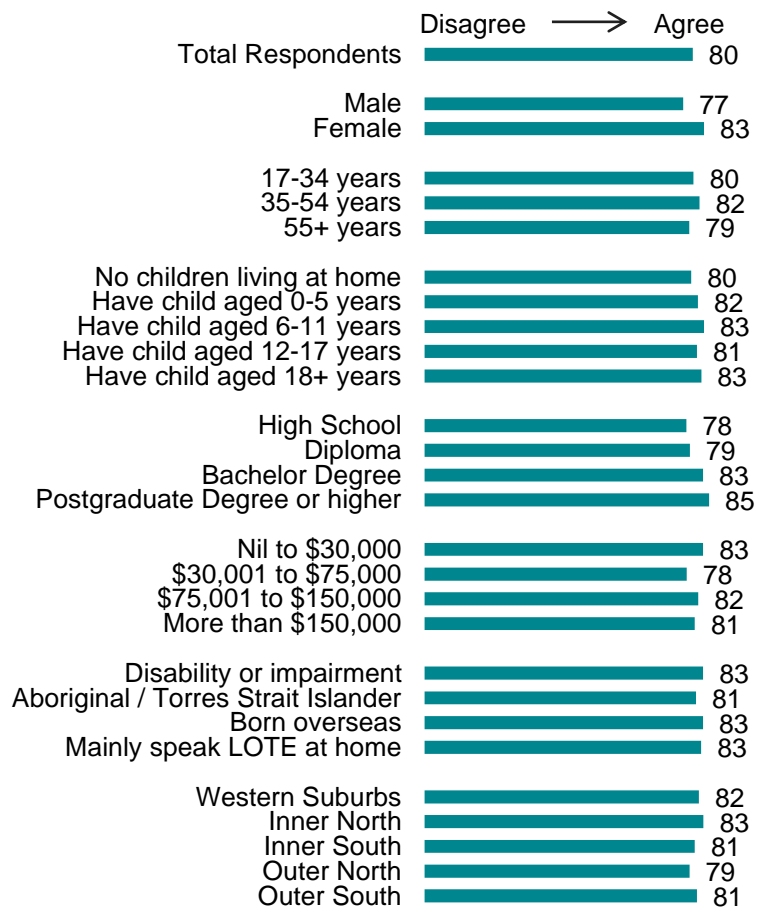


4.3 Community Variances

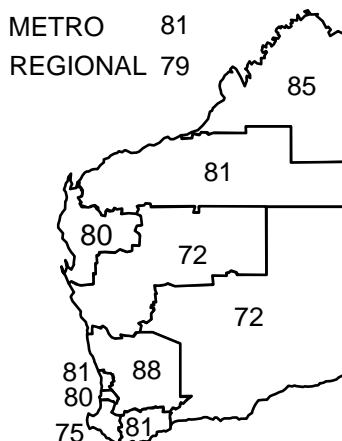
The Agreement Index Score is high across the community, ranging from 77 to 85. The highest score was provided by people with higher levels of education.

Across the regions, those in the Wheatbelt and Kimberley regions are most likely to agree that the WA Government should invest in arts and cultural activities (see Map 2).

Figure 4: Community Variances
Agreement Index Score



Map 2: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public. Base: All respondents, excludes unsure (n = 1,372) NB: 1% of all respondents answered 'unsure'

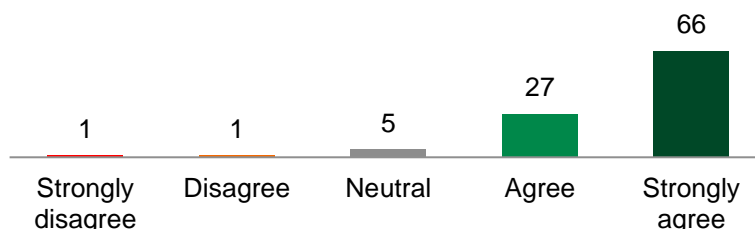
5 It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education

5.1 Level of Agreement

93% of respondents agree or strongly agree with the statement 'it is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education' (see Figure 5).

The mean score is 4.6 out of 5 and the Agreement Index Score is 89 out of 100

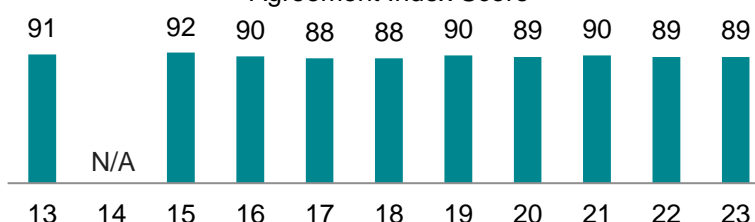
Figure 5: Overall Ratings
% of respondents



5.2 Trend Analysis

The Agreement Index Score has remained high and steady over recent years (see Figure 6).

Figure 6: Trend Analysis
Agreement Index Score

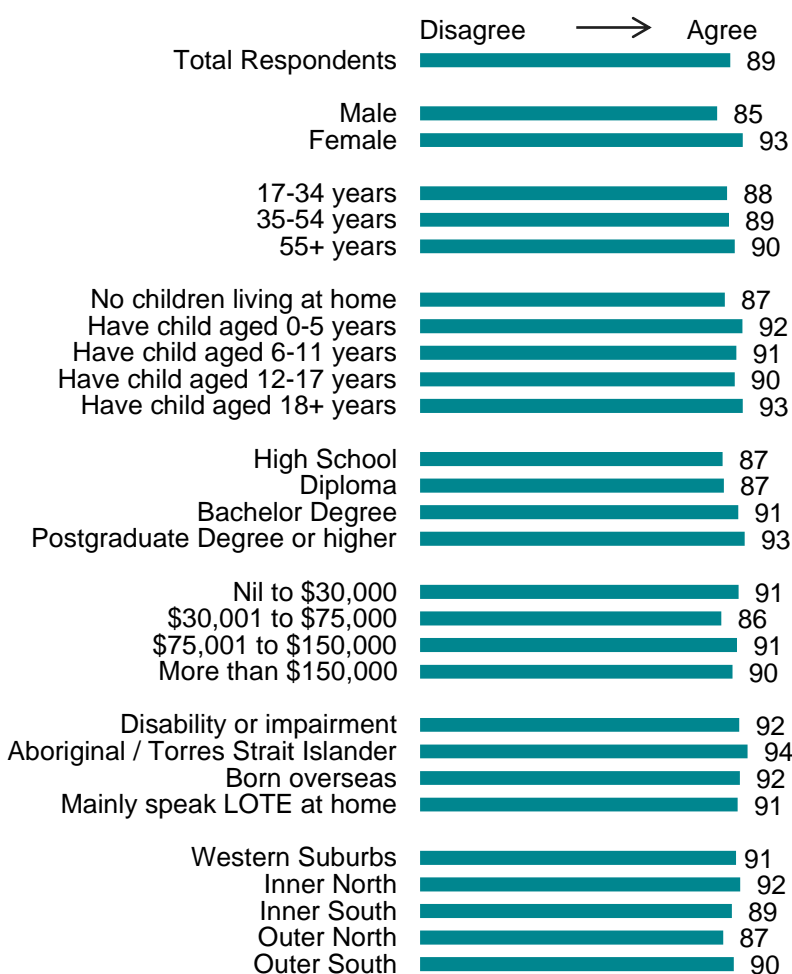


5.3 Community Variances

The Agreement Index Score is high across the community, ranging from 85 to 94 (see Figure 7). Aboriginal and Torres Strait Islander people are most likely to agree.

Across the regions, those in the Gascoyne, Great Southern and Kimberley regions are most likely to agree that children should have access to arts as part of their education (see Map 3).

Figure 7: Community Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education.
Base: All respondents, excludes unsure (n = 1,378) NB: 1% of all respondents answered 'unsure'

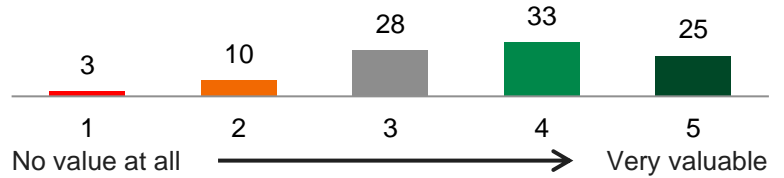
6 Perceived value of arts and culture for individuals

6.1 Overall Ratings

When asked 'how valuable is the role of arts and culture in your life?' 59%* of respondents rate value highly (see Figure 8).

The mean score is 3.7 out of 5 and the Index Score is 67 out of 100.

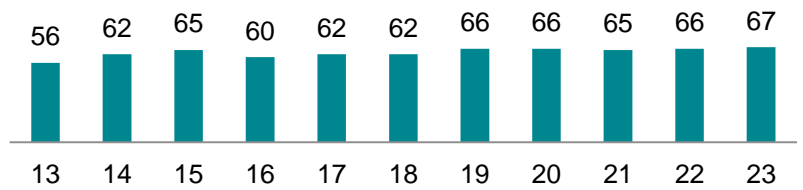
Figure 8: Overall Ratings
% of respondents



6.2 Trend Analysis

The Value Index Score has increased steadily over recent years (see Figure 9).

Figure 9: Trend Analysis
Value Index Score

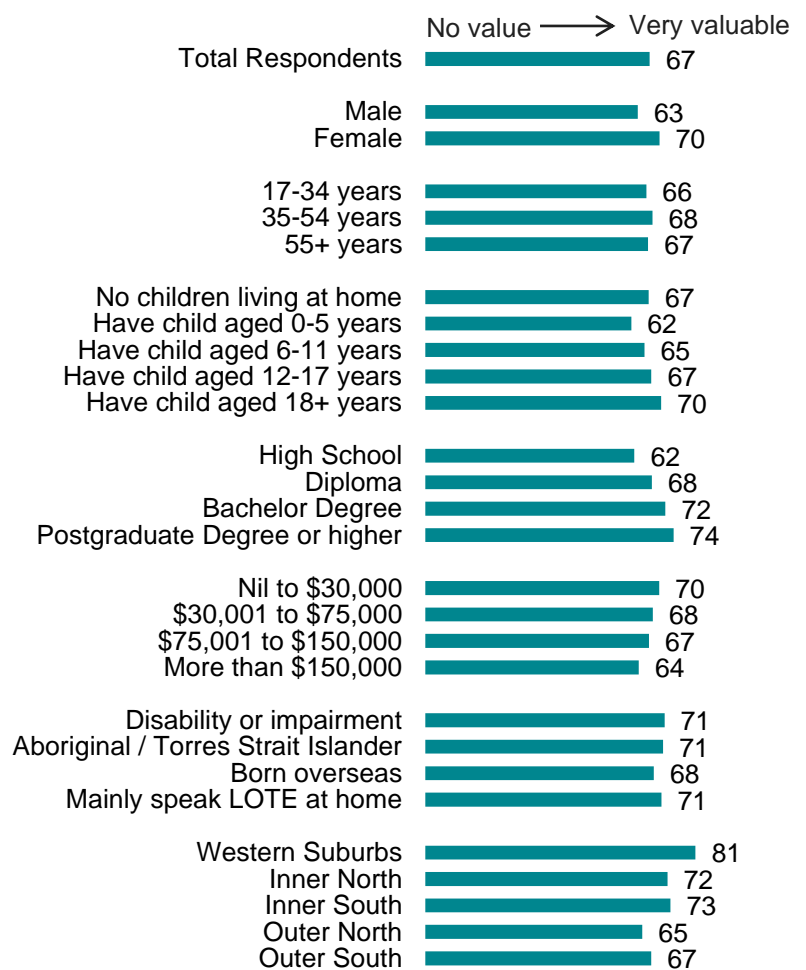


6.3 Community Variances

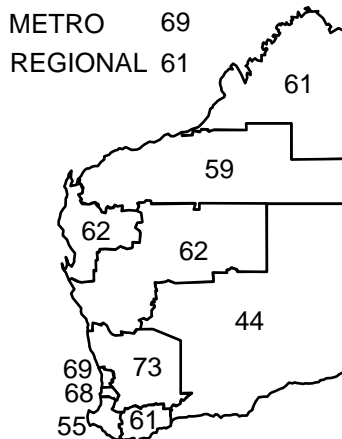
Perceived value is highest in Perth's western suburbs. Perceived value is lowest among males, those with lower levels of education, and those with young children (see Figure 10).

Across the regions, perceived value is highest in the Wheatbelt region and lowest in the Goldfields-Esperance region (see Map 4).

Figure 10: Community Variances
Value Index Score



Map 4: Regional Variances
Value Index Score



Q4b. How valuable is the role of arts and culture in your life?

Base: All respondents, excludes unsure (n = 1,372) NB: 1% of all respondents answered 'unsure'

* A subtotal variance of ±1% is explained by rounding to zero decimal places.

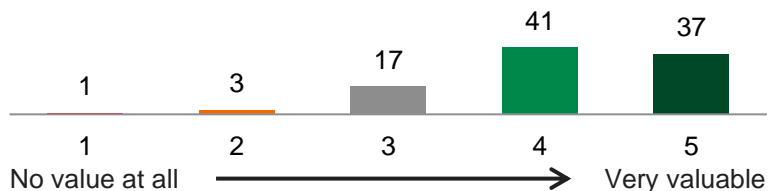
7 Perceived value of arts and culture in the community

7.1 Overall Ratings

When asked 'how valuable do you think the role of arts and culture is in the community?' 79%* of respondents rate value highly (see Figure 11).

The mean score is 4.1 out of 5 and the Index Score is 78 out of 100.

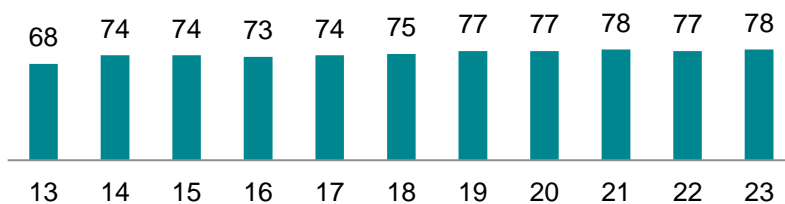
Figure 11: Overall Ratings
% of respondents



7.2 Trend Analysis

The Value Index Score has remained high and steady over recent years (see Figure 12).

Figure 12: Trend Analysis
Value Index Score

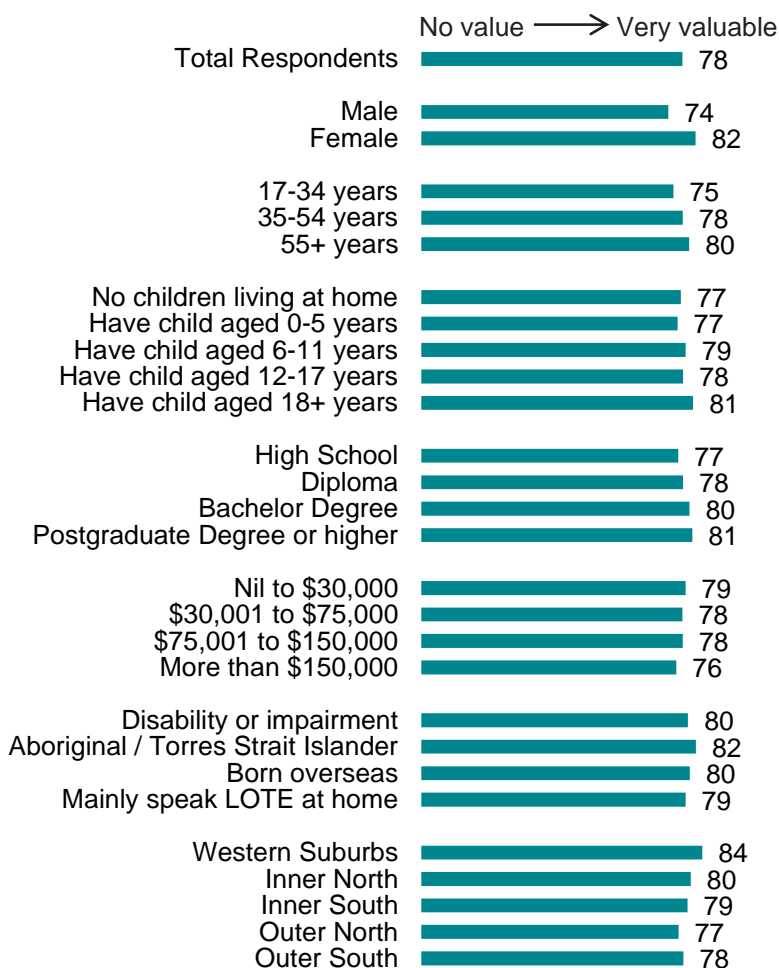


7.3 Community Variances

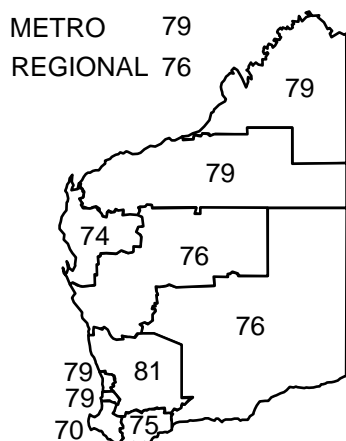
Community value is higher in Perth's western suburbs, and among females and Aboriginal and Torres Strait Islander people. Perceived value is lower among males (see Figure 13).

Across the regions, perceived value is highest in the Wheatbelt region and lowest in the South West region (see Map 5).

Figure 13: Community Variances
Value Index Score



Map 5: Regional Variances
Value Index Score



4c. How valuable do you think the role of arts and culture is in the community?

Base: All respondents, excludes unsure (n = 1,369) NB: 2% of all respondents answered 'unsure'

* A subtotal variance of $\pm 1\%$ is explained by rounding to zero decimal places.

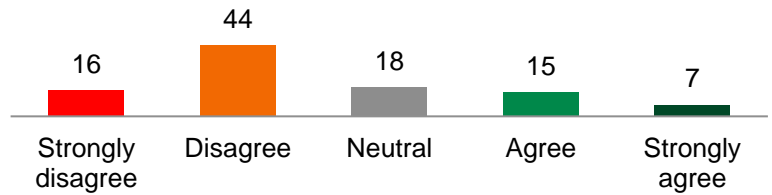
8 The arts only helps people who participate, not the broader community

8.1 Level of Agreement

21%* of respondents agree 'the arts only helps those people who participate, not the broader community'. 60% disagree with the statement. These people think the arts does help the broader community (see Figure 14).

The mean score is 2.5 out of 5 and the Index Score is 38 out of 100.

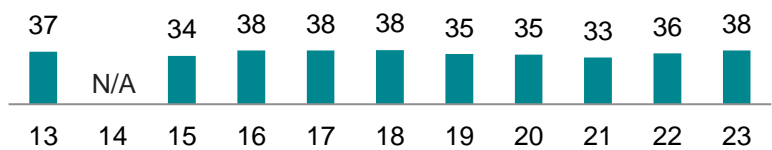
Figure 14: Overall Ratings
% of respondents



8.2 Trend Analysis

The Agreement Index Score has risen by 2 index points over the last year. At 38 points this year, it is equal to levels last seen between 2016 and 2018 (see Figure 15).

Figure 15: Trend Analysis
Agreement Index Score

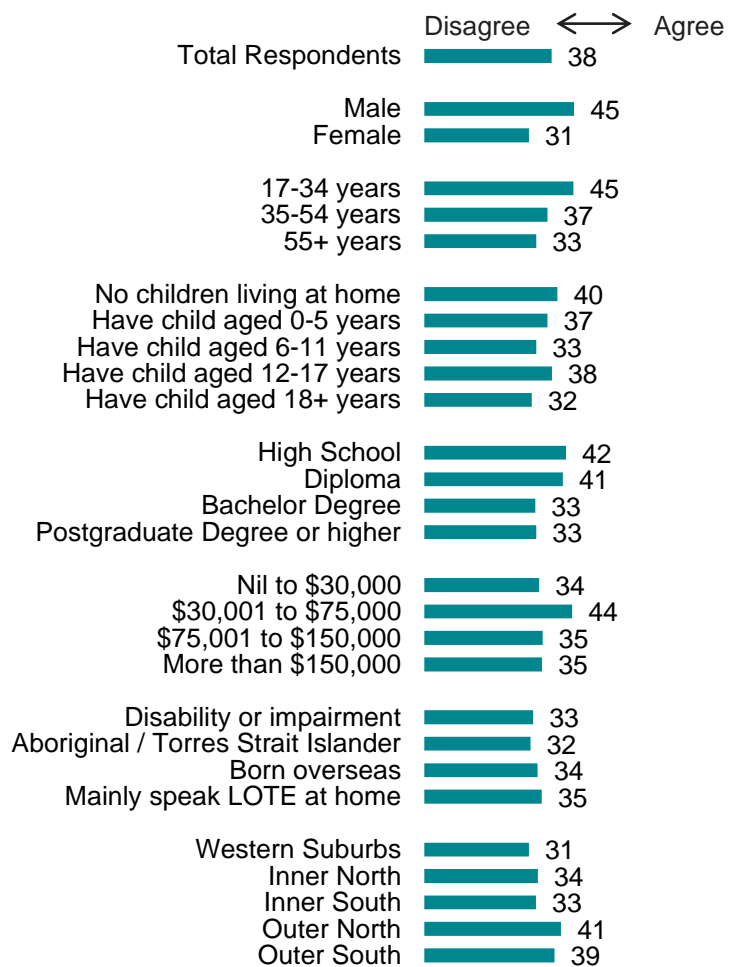


8.3 Community Variances

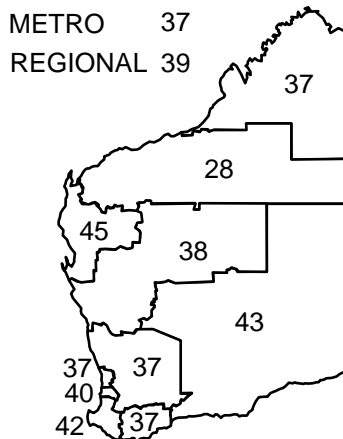
Level of agreement varies across the community. Females and people who live in Perth's western suburbs are less likely to agree (see Figure 16); they are more likely to think the arts does help the broader community.

Across the regions, respondents in the Pilbara region are the least likely to agree (see Map 6).

Figure 16: Community Variances
Agreement Index Score



Map 6: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? The arts only helps those people who participate, not the broader community.

Base: All respondents, excludes unsure (n = 1,337) NB: 4% of all respondents answered 'unsure'

* A subtotal variance of ±1% is explained by rounding to zero decimal places.

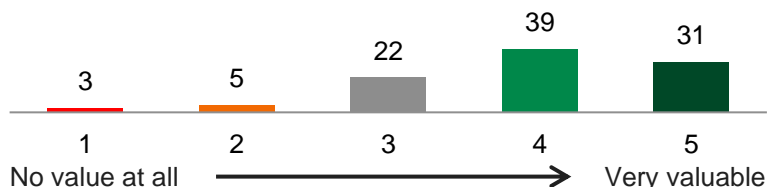
9 Value of arts and culture's contribution to creating a sense of community

9.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA?' 71%* of respondents rate value highly (see Figure 17).

The mean score 3.9 out of 5 and the Index Score is 73 out of 100.

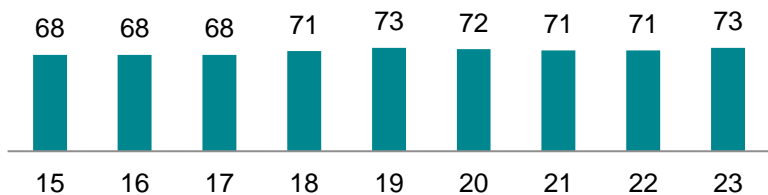
Figure 17: Overall Ratings
% of respondents



9.2 Trend Analysis

The Value Index Score has increased by 2 points to 73 this year. This is equal to levels last seen in 2019 (see Figure 18).

Figure 18: Trend Analysis
Value Index Score

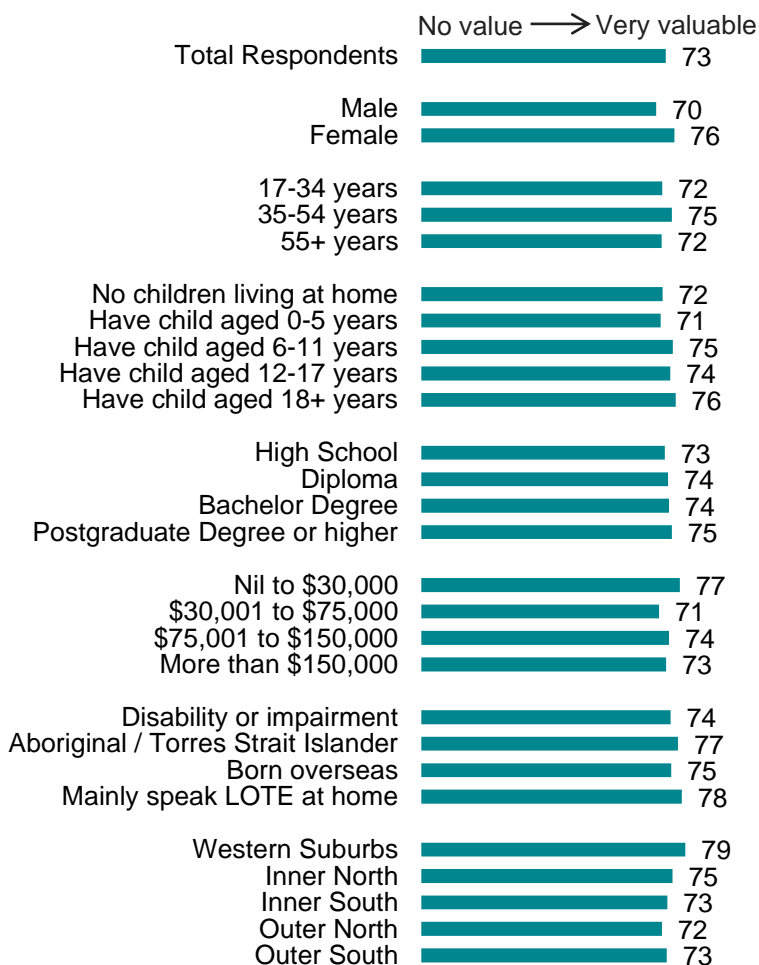


9.3 Community Variances

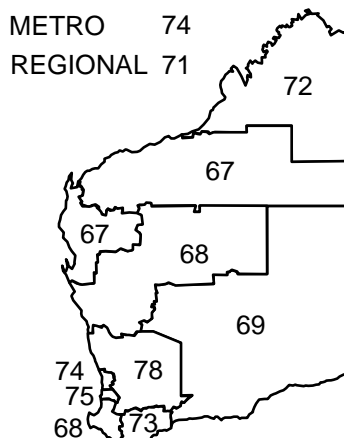
Perceived value is highest in Perth's western suburbs and among those who mainly speak a language other than English at home (see Figure 19).

Across the regions, perceived value is highest in the Wheatbelt region (see map 7). It is lowest in the Pilbara and Gascoyne regions.

Figure 19: Community Variances
Value Index Score



Map 7: Regional Variances
Value Index Score



Q5a. How valuable is the contribution of arts and culture to your sense of community in WA?

Base: All respondents, excludes unsure (n = 1,344) NB: 3% of all respondents answered 'unsure'

* A subtotal variance of $\pm 1\%$ is explained by rounding to zero decimal places.

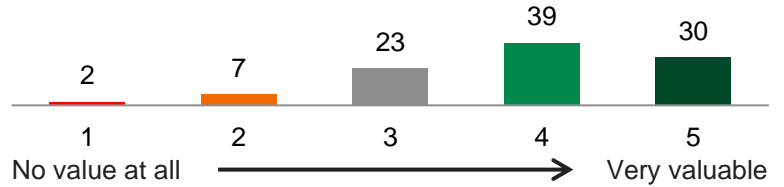
10 Value of arts and culture's contribution to creating a sense of identity

10.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to the identity of the state?' 68%* of respondents rate value highly (see Figure 20).

The mean score is 3.9 out of 5 and the Index Score is 72 out of 100.

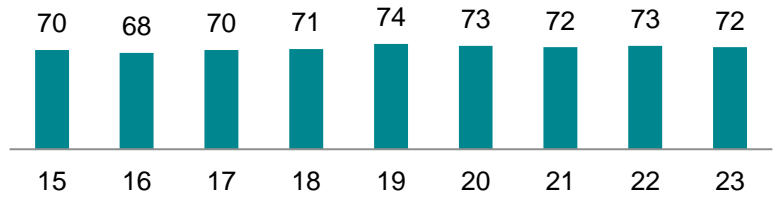
Figure 20: Overall Ratings
% of respondents



10.2 Trend Analysis

The Value Index Score has remained fairly consistent in recent years (see Figure 21).

Figure 21: Trend Analysis
Value Index Score

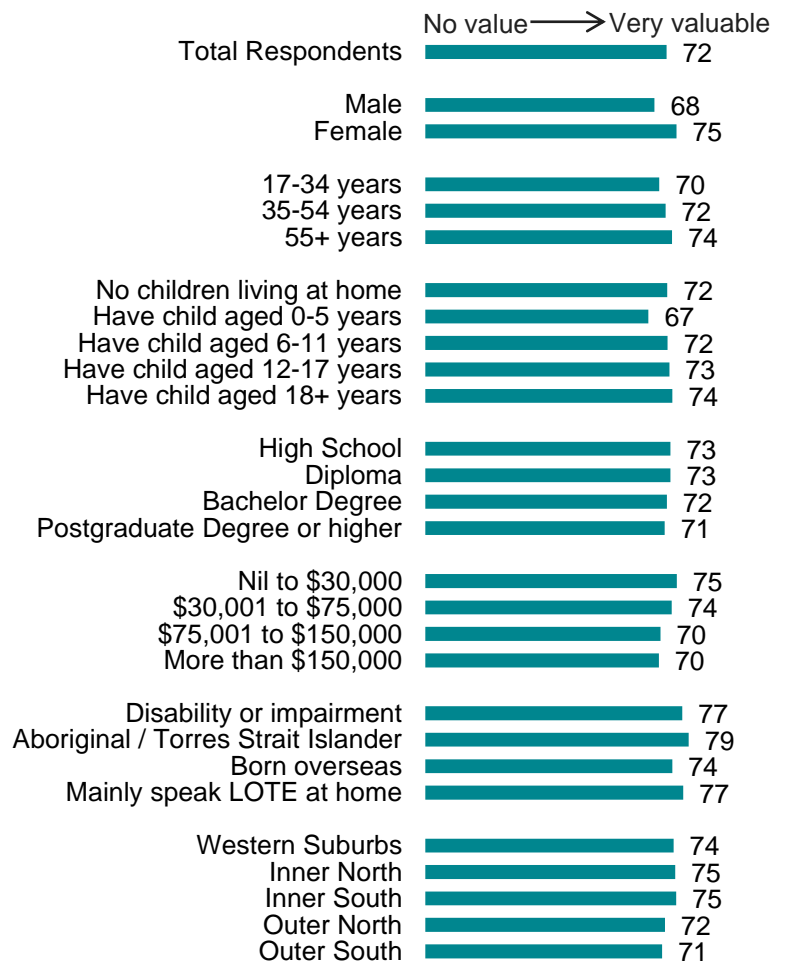


10.3 Community Variances

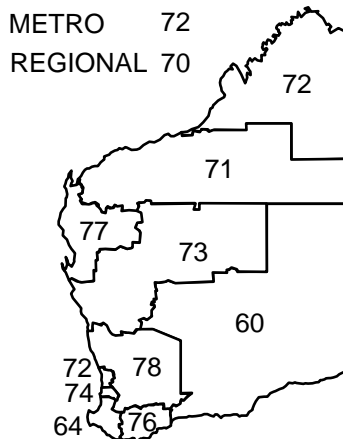
Perceived value is higher among Aboriginal and Torres Strait Islander people, those who mainly speak a language other than English at home, and those with disability (see Figure 22). Perceived value is lower among males and people with young children.

Across the regions, perceived value is highest in the Wheatbelt region and lowest in the Goldfields-Esperance region (see Map 8).

Figure 22: Community Variances
Value Index Score



Map 8: Regional Variances
Value Index Score



Q5b. How valuable is the contribution of arts and culture to the identity of the state?

Base: All respondents, excludes unsure (n = 1,345) NB: 3% of all respondents answered 'unsure'

* A subtotal variance of ±1% is explained by rounding to zero decimal places.

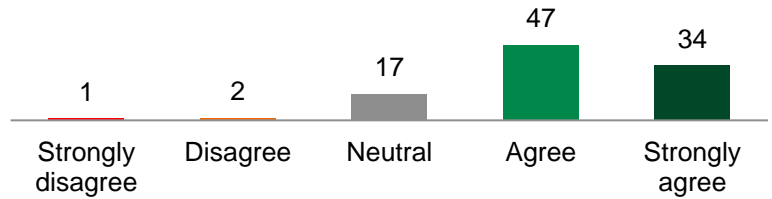
11 The arts make me feel good

11.1 Level of Agreement

81% of respondents agree or strongly agree with the statement 'the arts make me feel good' (see Figure 23).

The mean score is 4.1 out of 5 and the Index Score is 78 out of 100.

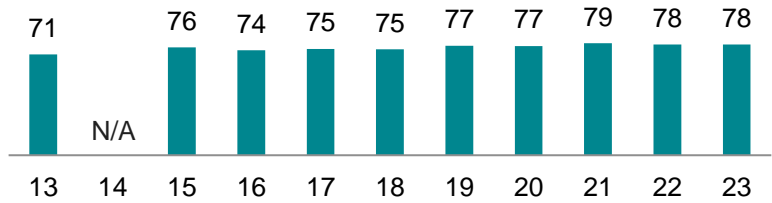
Figure 23: Overall Ratings
% of respondents



11.2 Trend Analysis

The Agreement Index Score has remained steady over recent years (see Figure 24).

Figure 24: Trend Analysis
Agreement Index Score

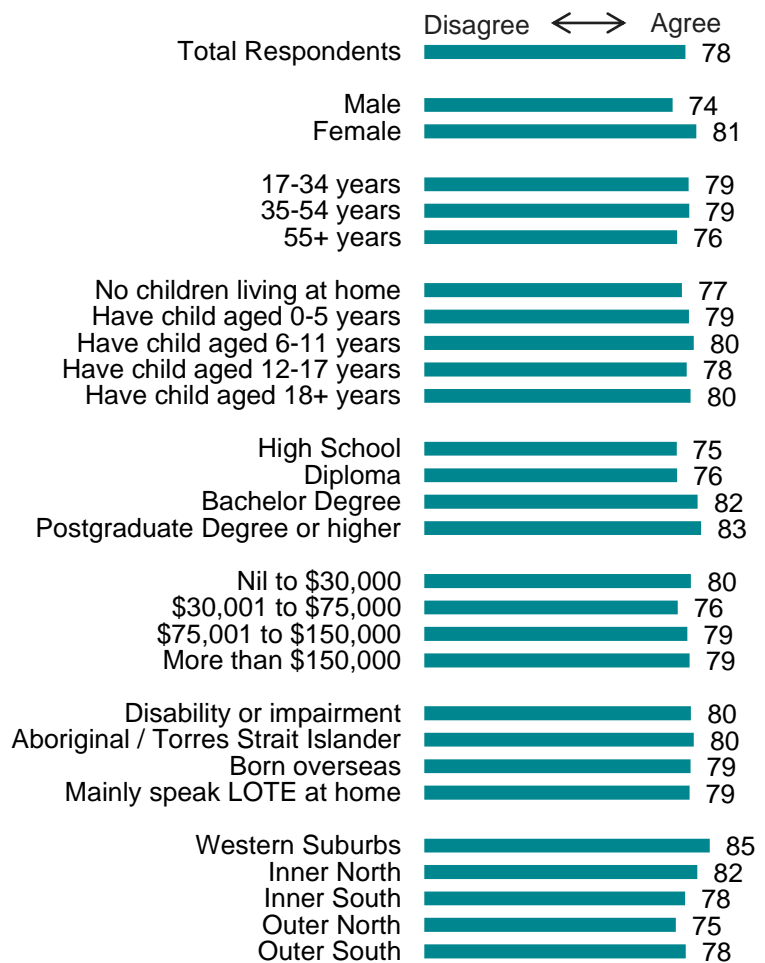


11.3 Community Variances

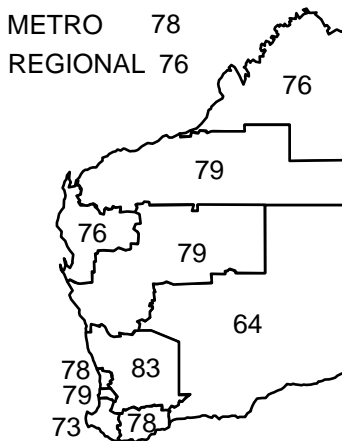
Agreement is higher among people living in Perth's western suburbs, and those with higher levels of education (see Figure 25). Level of agreement is lower among people with lower levels of education and those in Perth's outer north suburbs.

Across the regions, agreement is highest in the Wheatbelt region and is lowest in Goldfields-Esperance (see map 9).

Figure 25: Community Variances
Agreement Index Score



Map 9: Regional Variances
Agreement Index Score



Q3. How strongly do you agree or disagree with the following statements? The arts make me feel good.
Base: All respondents, excludes unsure (n = 1,379) NB: 1% of all respondents answered 'unsure'

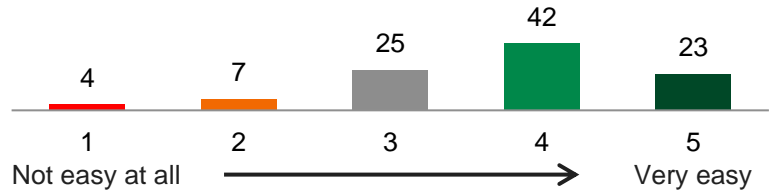
12 Ease of accessing or participating in arts and cultural activities in WA

12.1 Overall Ratings

64%* of respondents believe it is easy to access or participate in arts and cultural activities in WA, giving a rating of 4 or 5 out of 5 (see Figure 26).

The mean score is 3.7 out of 5 and the Index Score is 68 out of 100.

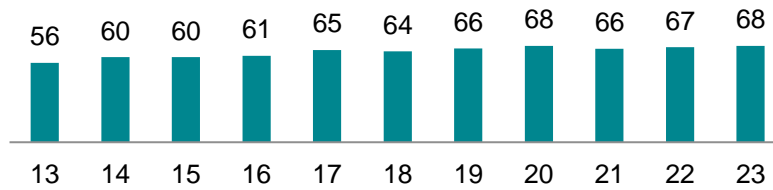
Figure 26: Overall Ratings
% of respondents



12.2 Trend Analysis

The Ease of Access Index Score has slightly increased over the last few years (see Figure 27).

Figure 27: Trend Analysis
Ease of Access Index Score

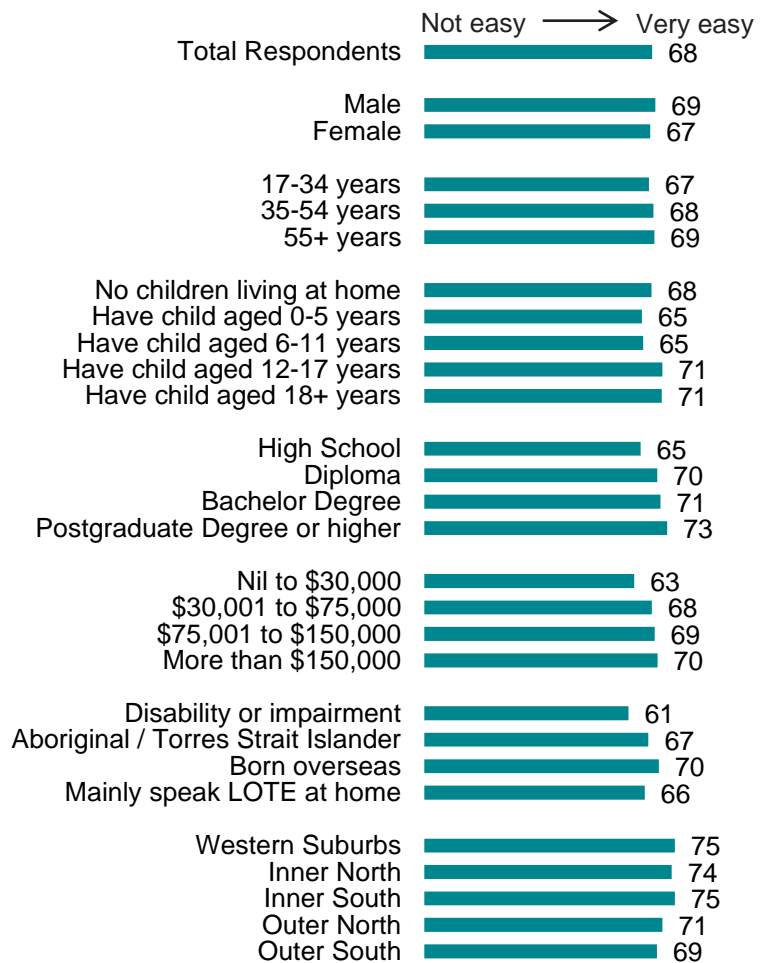


12.3 Community Variances

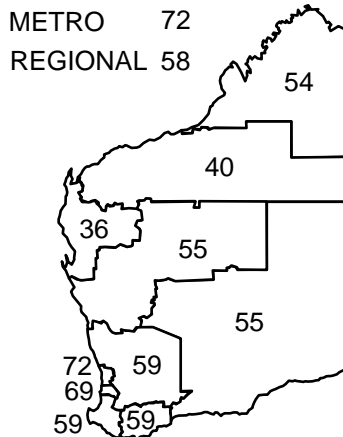
Respondents living in Perth’s western, inner north and inner south suburbs find it easiest to participate in arts and cultural activities (see Figure 28). Access is most difficult in the Gascoyne and Pilbara regions (see Map 10).

Ease of access improves with higher levels of education and income, and is more difficult among those with disability or impairments (see Figure 28).

Figure 28: Community Variances
Ease of Access Index Score



Map 10: Regional Variances
Ease of Access Index Score



Q4a. How easy is it for you to access or participate in arts and cultural activities in WA?

Base: All respondents, excludes unsure (n= 1,315) NB: 6% of all respondents answered 'unsure'

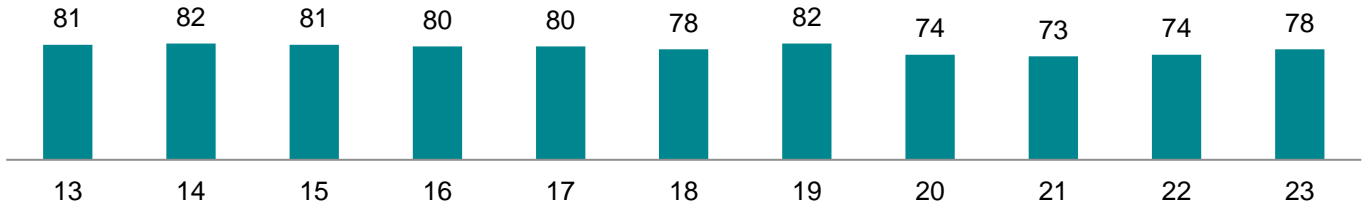
* A subtotal variance of ±1% is explained by rounding to zero decimal places.

13 Attendance and participation in arts and cultural activities in WA

13.1 Attendance and participation over the past 12 months

Survey participants were informed that arts and cultural activities includes a range of activities such as cinema, music, theatre, dance, visual arts, opera, festivals, libraries, galleries, museums, archives, and community cultural events. In 2023, 78% of respondents said they attended or participated in an arts or cultural activity in the past 12 months (see Figure 29). Attendance increased by 4% points from last year.

Figure 29: **Attendance or participation in an arts and cultural activity in the past 12 months**
% of respondents who attended or participated in past 12 months



Q2a. **Did you attend or participate in an arts or cultural activity in the past twelve months?**

Base: All respondents, excludes unsure (n=1,351) NB: 3% of all respondents answered 'unsure'

Please note variations in the questions from 2013 to 2019:

- 2019 Q2. How many times did you attend or participate in arts and cultural activities over summer?
Q2a. When was the last time you attended or participated in an arts and cultural activity?
- 2013-2018 Q2. How many times have you attended or participated in an arts and cultural activity over the past 3 months?
Q2a. How many times have you attended or participated in an arts and cultural activity over the past 2 years?

13.2 Community variances in attendance over the past 12 months

Attendance and participation is highest in Perth's western suburbs. Attendance increases with higher levels of education and income. Age appears to be a barrier for attendance, with participation rates dropping after the age of 55 years (see Figure 30).

Across the regions, attendance is highest in the Kimberley region, and lowest in the Gascoyne region (see Map 11).

Map 11: **Regional Variances**
% of respondents

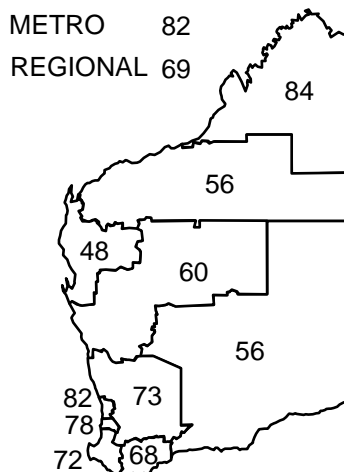
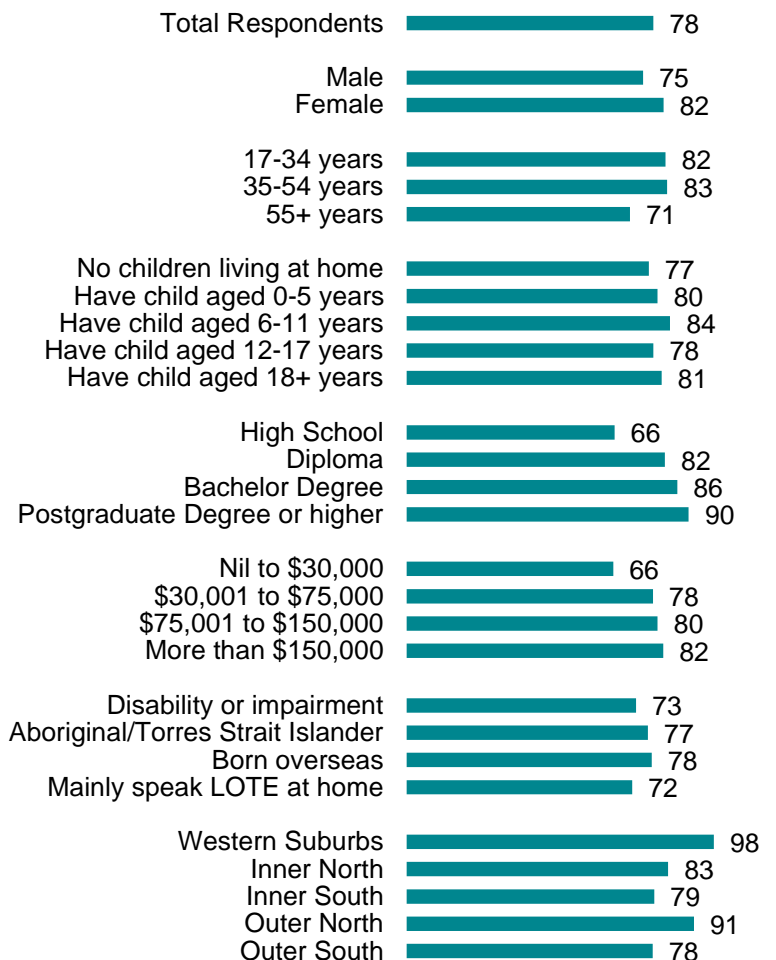


Figure 30: **Community Variances**
% of respondents who attended or participated in arts and cultural activities in the past 12 months



13.3 Frequency of attendance and participation in arts and culture over summer

Participation in arts and culture over summer recovered to 75%, up from 71% last year and continuing to grow from a low of 68% in 2021 when attendance was most severely impacted by the COVID-19 pandemic.

Over summer, 3% of respondents attended or participated in arts and culture at least once a week, 11% attended around two or three times per month, 23% attended around once a month, 29% attended one or two times over summer, and 8% attended less often (see Figure 31). 25% of respondents did not attend or participate in any arts or culture activities over summer.

Figure 31: **Attendance or participation in arts and culture over summer**

% of respondents	2016	2017	2018	2019	2020	2021	2022	2023	Variance
12+ times (around once a week or more often)	5	5	5	7	7	3	4	3	-1
5-11 times (around 2 or 3 times a month)	19	15	13	17	15	9	10	11	+1
3-4 times (around once a month)	23	20	21	23	20	18	19	23	+4
1-2 times (around once every 2 to 3 months)	23	26	27	25	24	28	30	29	-1
Less often	-	9	9	10	6	9	7	8	+1
Not at all in the past 3 months	-	25	26	18	29	32	29	25	-4

Q2b. How many times did you attend or participate in arts and cultural activities over summer?

Base: All respondents, excludes unsure (n = 1,055)

2019-2023 Q2. How many times did you attend or participate in arts and cultural activities over summer?

2016-2018 Q2. How many times have you attended or participated in an arts and cultural activity over the past 3 months?

13.4 Ever attended or participated in arts and culture

97% of respondents have attended an arts or cultural activity before. 86% of respondents attended an arts or culture activity within the past two years and 11% of respondents attended over two years ago. The non-participation rate has fallen to 3% (see Figure 32).

Figure 32: **Attendance / participation in the arts**

% of respondents	2016	2017	2018	2019	2020	2021	2022	2023	Variance
Within past 2 years	91	87	85	85	83	84	82	86	+4
Over 2 years ago	9	13	15	8	11	12	13	11	-2
Never	-	-	-	7	7	4	5	3	-2

Q2c. When was the last time you attended or participated in an arts and cultural activity?

Base: All respondents, excludes unsure (n = 1,342)

Please note variations in the questions from 2016-2018 and 2019-2023 represented in Figure 32:

2019-2023 Q2a. When was the last time you attended or participated in an arts and cultural activity?

2016-2018 Q2a. How many times have you attended or participated in an arts and cultural activity over the past 2 years?

13.5 Community variances in attendance | summary

Attendance patterns vary across the community. People living in Perth's western and inner south suburbs, and those with higher levels of education are most likely to attend or participate in arts and culture frequently, at least once a month over summer (see Table 3). Frequent attendance is lower in the regions, in particular the Pilbara, Goldfields-Esperance, Gascoyne and Mid West regions.

Table 3: Frequency of participating in the arts | community variances

% of respondents	At least once a month over summer Q2b	At least once over summer Q2b	At least once in the past year Q2a	Have attended before Q2c	Never attended Q2c
All respondents	37	75	78	97	3
Male	35	73	75	96	4
Female	39	77	82	98	2
17-34 years	39	80	82	99	1
35-54 years	41	79	83	97	3
55+ years	33	67	71	95	5
No children living at home	36	74	77	96	4
Have child aged 0-5	31	75	80	99	1
Have child aged 6-11	47	80	84	99	1
Have child aged 12-17	38	76	78	97	3
Have child aged 18+	44	80	81	99	1
High School	29	63	66	94	6
Diploma	36	78	82	98	2
Bachelor Degree	44	82	86	98	2
Postgraduate Degree or higher	51	87	90	99	1
Nil to \$30,000	34	62	66	94	6
\$30,001 to \$75,000	38	74	78	96	4
\$75,001 to \$150,000	37	77	80	97	3
More than \$150,000	42	78	82	98	2
Disability or impairment	31	71	73	97	3
Aboriginal / Torres Strait Islander	43	72	77	95	5
Born overseas	40	75	78	97	3
Mainly speak LOTE at home	34	70	72	94	6
Metro	42	79	82	98	2
Regional	24	64	69	95	5
Western Suburbs	57	94	98	100	0
Inner North	48	81	83	99	1
Inner South	55	88	91	97	3
Outer North	38	75	79	97	3
Outer South	37	76	78	97	3
Gascoyne	15	57	48	95	5
Goldfields-Esperance	13	53	56	90	10
Great Southern	27	57	68	92	8
Kimberley	30	77	84	98	2
Mid West	17	52	60	93	7
Peel	31	75	78	95	5
Perth	42	79	82	98	2
Pilbara	9	44	56	92	8
South West	24	66	72	95	5
Wheatbelt	26	69	73	98	2

Q2a. Did you attend or participate in an arts or cultural activity in the past twelve months?

Base: All respondents, excludes unsure (n= 1,351)

Q2b. IF Q2a = yes: How many times did you attend or participate in arts and cultural activities over summer?

Q2c. IF Q2a = no/unsure: When was the last time you attended or participated in an arts and cultural activity?

Base for Q2b/Q2c: All respondents who answered Q2b or Q2c, excludes unsure (n = 283)

14 Motivations for participating in arts and cultural activities


















The main motivators for participating in arts and cultural activities continue to be interest in the content, having fun, experiencing new things, and interacting with friends and family (see Figure 33).

Motivating factors have remained fairly steady over the past year. The biggest shifts were for interest in the content and interacting with family and friends. Both increased by 4% points.

As shown in table 4 (overleaf), motivators vary across the community. Key variances include:

- Being interested in the content is more of a motivator for those in the Wheatbelt and Perth's western suburbs and among older people, and less of a motivator in the Gascoyne and Goldfields-Esperance regions.
- Having fun is more of a motivator for families, younger adults, and in the Great Southern region.
- Experiencing new things is more of a motivator in the Pilbara and Mid West regions, for families, and those on higher incomes.
- Interacting with family and friends is more of a motivator for families with children aged 0-5 years or 12-17 years, those who mainly speak a language other than English at home, and respondents earning more than \$150,000.

Figure 33: **Top motivators for participating in arts and cultural activities**

% of respondents	2019	2020	2021	2022	2023	Variance
Interest in the content  45	39	41	41	41	45	+4
Having fun  37	37	37	38	36	37	+1
Experiencing new things  36	34	34	39	36	36	0
Interacting with friends and/or family  33	32	33	34	29	33	+4
Relaxing or feeling less stressed  19	20	22	22	17	19	+2
Learning something new  18	21	17	20	20	18	-2
Broadening my perspective or worldview  16	21	17	20	19	16	-3
Supporting the cultural world  14	13	12	14	15	14	-1
Feeling inspired  13	14	11	11	14	13	-1
Connecting to my community  11	14	14	12	12	11	-1
Bettering my health/well-being  10	7	8	9	8	10	+2
Being able to go by myself  7	6	4	5	5	7	+2
Feeling transported to another place  7	7	9	8	8	7	-1
Feeling like it gives life a deeper meaning  6	8	9	6	10	6	-4
Feeling welcome  6	4	5	5	6	6	0
Having grown up participating in it  5	6	5	4	6	5	-1
None of these  1	1	2	0	1	1	0

Q3. **What motivates you to participate in art and cultural activities?** Please select your top 3 motivators from the following list.

Base: All respondents who have ever participated in arts and cultural activities, excludes unsure (n = 1,290)

Table 4: **Top 4 motivators for participating in arts and cultural activities | community variances**

% of respondents	Interest in the content	Having fun	Experiencing new things	Interacting with friends/family
All respondents	45	37	36	33
Male	45	35	36	28
Female	45	38	37	38
17-34 years	37	46	36	35
35-54 years	42	39	42	39
55+ years	55	26	31	25
No children living at home	48	33	35	28
Have child aged 0-5	38	46	45	46
Have child aged 6-11	34	47	42	37
Have child aged 12-17	41	45	42	45
Have child aged 18+	51	31	34	34
High School	42	43	39	30
Diploma	46	33	36	33
Bachelor Degree	43	36	41	33
Postgraduate Degree or higher	49	33	28	33
Nil to \$30,000	43	25	32	29
\$30,001 to \$75,000	41	32	30	27
\$75,001 to \$150,000	49	41	41	33
More than \$150,000	41	42	45	43
Disability or impairment	44	33	29	29
Aboriginal / Torres Strait Islander	47	24	25	26
Born overseas	45	38	39	31
Mainly speak LOTE at home	28	40	35	45
Perth Metro	46	38	36	33
WA Regional	41	34	38	32
Western Suburbs	53	41	25	32
Inner North	47	39	38	33
Inner South	50	31	29	27
Outer North	43	36	38	33
Outer South	46	39	37	35
Gascoyne	16	36	27	35
Goldfields-Esperance	26	36	38	31
Great Southern	49	46	41	35
Kimberley	53	21	26	41
Mid West	36	44	44	23
Perth	35	41	33	31
Peel	46	38	36	33
Pilbara	40	28	50	34
South West	40	26	38	36
Wheatbelt	58	30	37	28

Q3. What motivates you to participate in art and cultural activities? Please select your top 3 motivators from the following list.

Base: All respondents who have ever participated in arts and cultural activities, excludes unsure (n = 1,290)

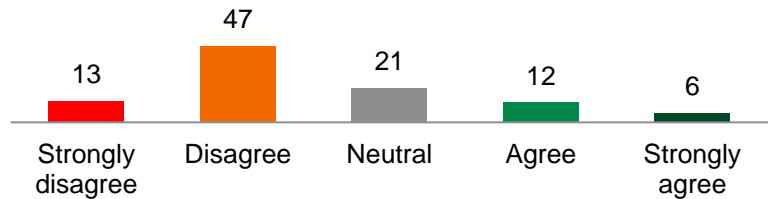
15 Few people agree that arts companies should rely on ticket sales alone

15.1 Level of Agreement

Only 18% of respondents agree that 'all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone'. 61%* disagree with this statement (see Figure 34).

The mean score is 2.5 out of 5 and the Index Score is 38 out of 100.

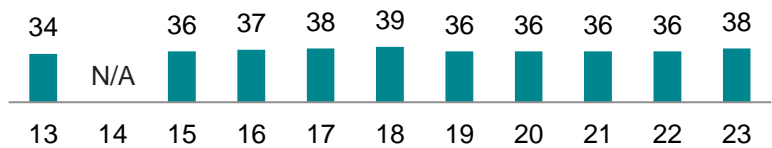
Figure 34: Overall Ratings
% of respondents



15.2 Trend Analysis

The Agreement Index Score has increased 2 points to 38 this year (see Figure 35).

Figure 35: Trend Analysis
Agreement Index Score

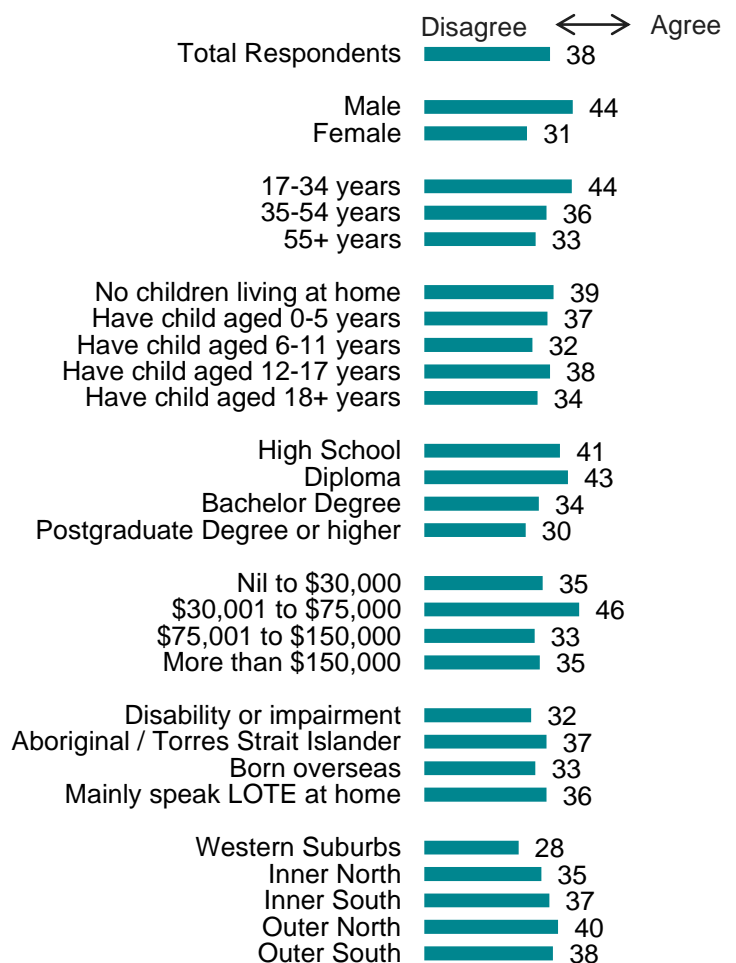


15.3 Community Variances

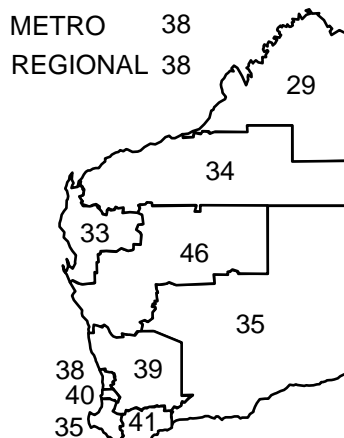
Level of agreement varies across the population. People who live in Perth's western suburbs, those with higher levels of education and females are more likely to disagree that arts companies should rely on ticket sales alone (see Figure 36).

Across the regions, respondents in the Kimberley region are more likely to disagree, while those in the Mid West region are most likely to agree (see Map 12).

Figure 36: Community Variances
Agreement Index Score



Map 12: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? All theatre, ballet and opera companies and public art galleries etc should rely on their tickets sales alone.

Base: All respondents, excludes unsure (n = 1,309) NB: 6% of all respondents answered 'unsure'

* A subtotal variance of ±1% is explained by rounding to zero decimal places.

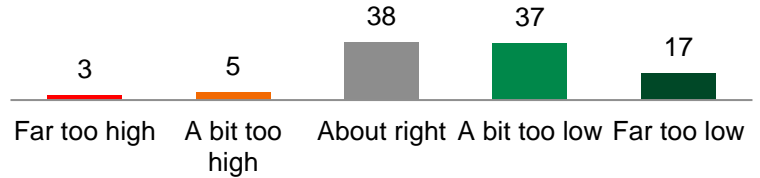
16 Perceptions of WA Government's allocation of about \$2.12 per person per week for arts and cultural activities, services & facilities

16.1 Community opinion

When asked whether \$2.12 per person per week in allocation by the WA Government for arts and cultural activities was too low, about right or too high, 54% thought it was too low (see Figure 37).

The mean score was 3.6 out of 5 and the Index Score was 65 out of 100.

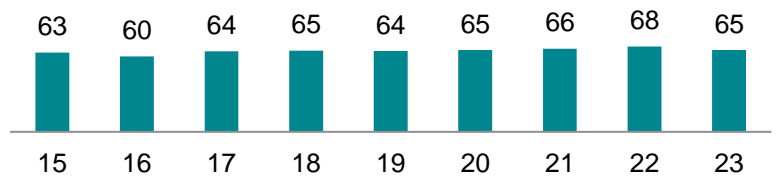
Figure 37: Overall Ratings
% of respondents



16.2 Trend Analysis

The Funding Allocation Index Score dropped 3 points in the last 12 months to 65 (see Figure 38).

Figure 38: Trend Analysis*
Funding Allocation Index Score



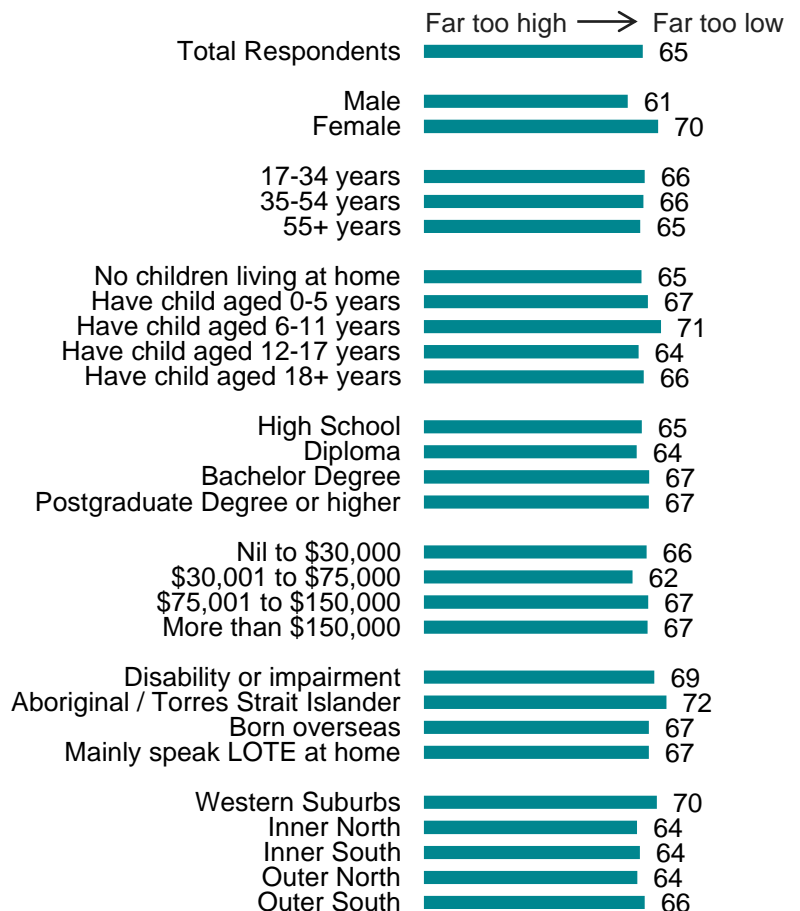
*Please note: 2015 and 2016 based on \$1 per person per week (calculated on 'Arts' activities alone), 2017 and 2018 based on \$2 per person per week, 2019 to 2021 based on \$2.21 per person per week, 2022 based on \$2.73 per person per week, and 2023 based on \$2.12 per person per week (calculated on 'Arts and Cultural' activities).

16.3 Community Variances

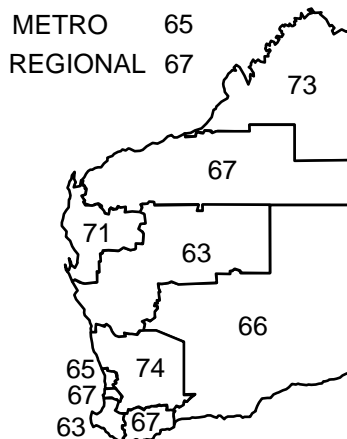
Aboriginal and Torres Strait Islander people, those in Perth's western suburbs and females are more likely to say the allocation of \$2.12 per person per week is too low (see Figure 39).

Across the regions, respondents in the Wheatbelt, Kimberley and Gascoyne regions are most likely to think the current allocation is too low (see Map 13).

Figure 39: Community Variances
Funding Allocation Index Score



Map 13: Regional Variances
Funding Allocation Index Score



Q6a¹. About \$2.12 per person per week is allocated by WA Government for arts and cultural activities, services and facilities in WA. Do you consider this amount to be too low, about right or too high?

Base: All respondents, excludes unsure (n = 1,212) NB: 13% of all respondents answered 'unsure'





¹ This figure is based on the expenditure per person figure in the Cultural Funding by Government, Australia, 2020-21

17 Willingness to pay more to improve access to arts and culture in WA

The percentage of respondents willing to pay more to improve access to arts and culture in WA has remained fairly steady at 81% after reaching an all-time high last year of 82% (see Figure 40). 35% of respondents would be willing to pay up to \$2 more per week, 41% of respondents would be willing to pay between \$2 and \$10 more, and 5% would be willing to pay over \$10 more per week.

The percentage of respondents who would not be willing to pay any more has remained fairly steady at 19% this year (see Figure 40).

Figure 40: Willingness to pay more to improve access to arts and culture in WA

% of respondents		2015	2016	2017	2018	2019	2020	2021	2022	2023	Variance
Not willing to pay any more	 19	25	29	28	27	23	24	20	18	19	+1
Willing to pay \$0.01 to \$2 more per week	 35	44	46	32	33	32	31	35	31	35	+4
Willing to pay \$2.01 to \$10 more per week	 41	29	24	36	37	40	39	40	45	41	-4
Willing to pay over \$10 more per week	 5	2	1	4	3	4	6	6	6	5	-1

Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA?

Base: All respondents, excludes unsure (n = 1,184) NB: 15% of all respondents answered 'unsure'

Views vary across the community (see Table 5). Key variances include:

- People with higher levels of education and income are more willing to pay \$2 or more extra to expand provision of or to increase access to arts and culture in WA.
- By location, respondents in the Wheatbelt and Pilbara regions, and Perth's western and inner south suburbs, are more willing to pay \$2 or more extra to expand provision of or to increase access to arts and culture in WA.
- People in the Goldfields-Esperance region are the least willing to pay any extra to expand provision of or to increase access to arts and culture in WA.

Table 5: **Willingness to pay more to improve access to arts and culture in WA | community variances**

% of respondents	None	\$0.01-\$2 more	\$2.01-\$10 more	Over \$10 more
All respondents	19	35	41	5
Male	20	37	38	5
Female	19	33	44	5
17-34 years	13	38	44	4
35-54 years	18	36	41	5
55+ years	25	33	38	4
No children living at home	19	36	41	4
Have child aged 0-5	18	41	38	3
Have child aged 6-11	14	37	45	4
Have child aged 12-17	22	32	41	6
Have child aged 18+	20	28	44	8
High School	20	32	43	5
Diploma	16	42	39	3
Bachelor Degree	17	35	42	5
Postgraduate Degree or higher	17	31	46	6
Nil to \$30,000	24	40	28	8
\$30,001 to \$75,000	17	38	41	3
\$75,001 to \$150,000	18	37	40	4
More than \$150,000	16	29	50	6
Disability or impairment	18	36	40	6
Aboriginal / Torres Strait Islander	28	21	46	5
Born overseas	19	33	43	6
Mainly speak LOTE at home	25	33	36	7
Metro	18	36	42	4
Regional	22	33	39	6
Western Suburbs	17	30	47	6
Inner North	19	38	39	5
Inner South	22	26	49	3
Outer North	18	38	41	3
Outer South	17	37	41	5
Gascoyne	8	54	36	1
Goldfields-Esperance	41	18	34	7
Great Southern	26	35	37	2
Kimberley	6	52	41	2
Mid West	21	34	43	3
Peel	22	33	32	13
Perth	18	36	42	4
Pilbara	11	33	47	10
South West	26	35	37	2
Wheatbelt	10	28	54	8

Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA?

Base: All respondents, excludes unsure (n = 1,184) NB: 15% of all respondents answered 'unsure'

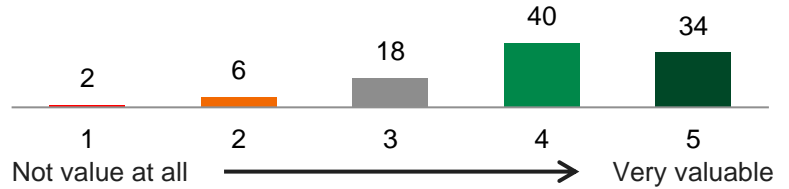
18 Value of WA film and television industry

18.1 Overall Ratings

When asked 'how valuable do you think the WA film and television industry is to the community', 74% of respondents rate value highly (see Figure 41).

The mean score is 4 out of 5 and the Index Score is 75 out of 100.

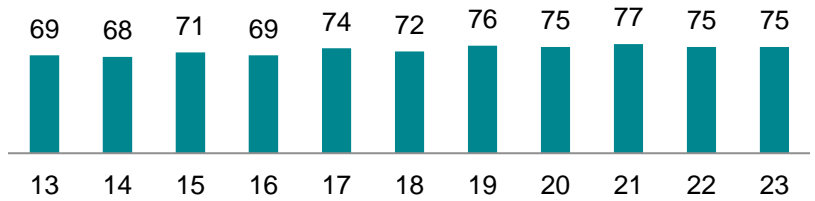
Figure 41: Overall Ratings
% of respondents



18.2 Trend Analysis

The Value Index Score has remained steady over the past 12 months at 75 points (see Figure 42).

Figure 42: Trend Analysis
Value Index Score

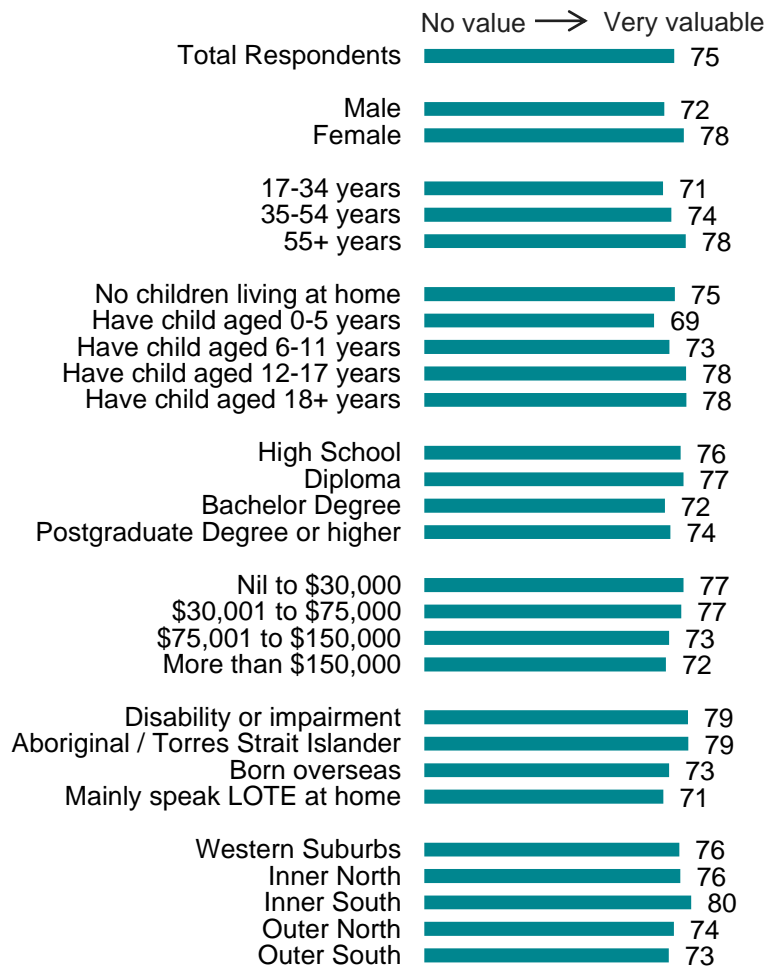


18.3 Community Variances

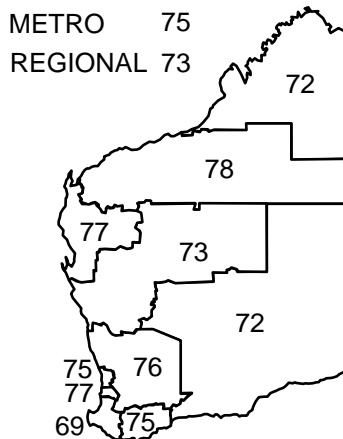
Perceived value is higher among those who live in Perth's inner south suburbs, those with disability, and Aboriginal and Torres Strait Islander people (see Figure 43). Perceived value is lowest among families with children aged 0-5 years.

Across the regions, perceived value is highest in the Pilbara and Gascoyne regions and lowest in the South West (see Map 14).

Figure 43: Community Variances
Value Index Score



Map 14: Regional Variances
Value Index Score



Q7a. How valuable do you think the Western Australian film and television industry is to the community?

Base: All respondents, excludes unsure (n = 1,340) NB: 4% of all respondents answered 'unsure'

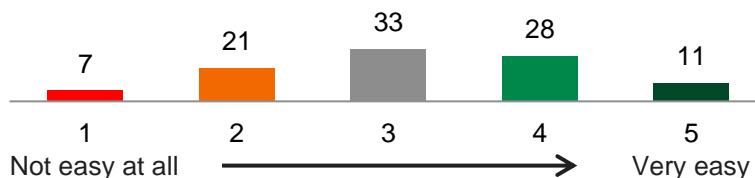
19 Accessibility of WA film and television productions

19.1 Overall Ratings

When asked 'how easy is it for you to access Western Australian produced film and television productions?' 40%* rated ease of access highly (see Figure 44).

The mean score is 3.2 out of 5 and the Index Score is 54 out of 100.

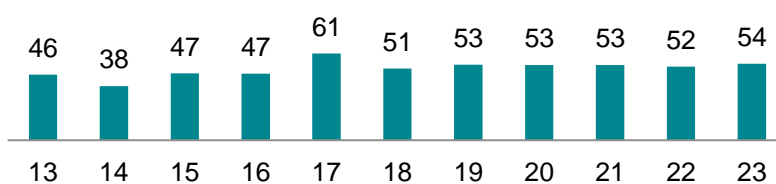
Figure 44: Overall Ratings
% of respondents



19.2 Trend Analysis

The Ease of Access Index Score increased by 2 index points to 54 in the last 12 months (see Figure 45).

Figure 45: Trend Analysis
Ease of Access Index Score

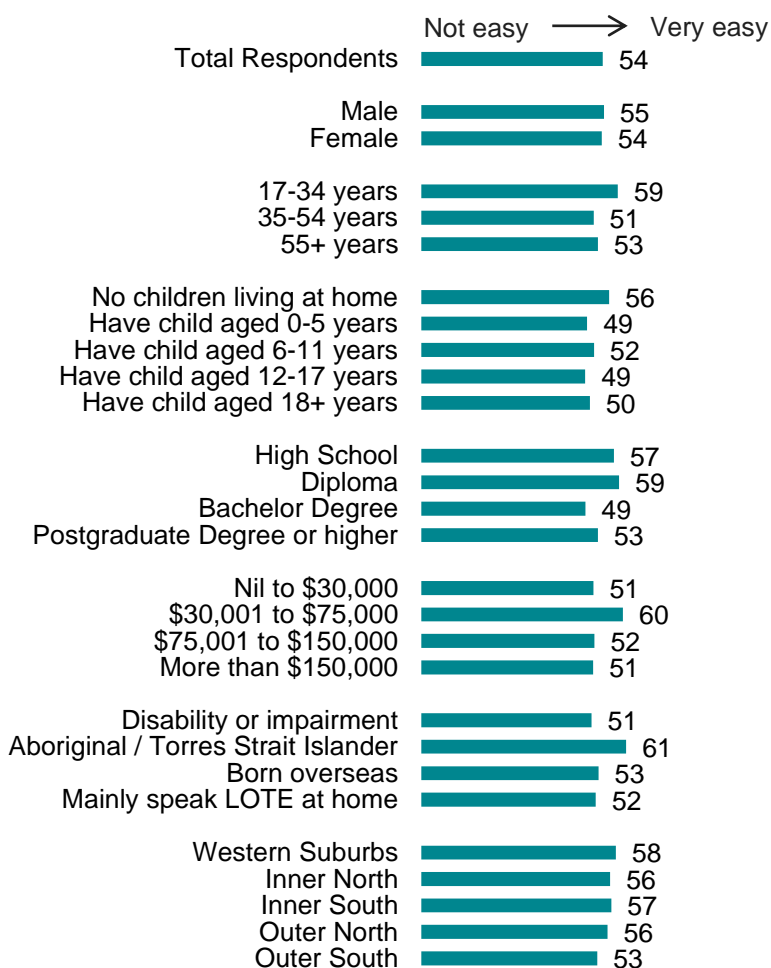


19.3 Community Variances

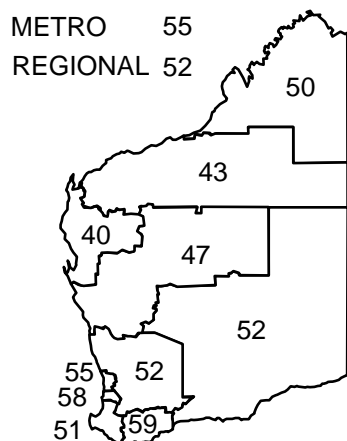
Ease of access is highest among Aboriginal and Torres Strait Islander people, those with an annual income of \$30,001 - \$75,000, among younger adults aged 17-34 years, and respondents with lower levels of education (see Figure 46).

Across the regions, ease of access is higher in the Great Southern and Peel regions, and lower in the Gascoyne and Pilbara regions (see Map 15).

Figure 46: Community Variances
Ease of Access Index Score



Map 15: Regional Variances
Ease of Access Index Score



Q7b. How easy is it for you to access Western Australian produced film and television productions?

Base: All respondents, excludes unsure (n = 1,165) NB: 16% of all respondents answered 'unsure'

* A subtotal variance of ±1% is explained by rounding to zero decimal places.

Appendix | Survey Questions

Questions

Q1. The following study is being conducted on behalf of Culture and the Arts (WA), a division of the Department of Local Government, Sport and Cultural Industries. Do you or anyone in your household work for Culture and the Arts (WA) or an agency or organisation that is funded by them? IF YES, CLOSE.

Q2a. Arts and cultural activities includes a range of activities such as the cinema, music, theatre, dance, visual arts, opera, festivals, libraries, galleries, museums, archives and community cultural events. Did you attend or participate in an arts or cultural activity in the past twelve months?

Q2b. IF YES AT Q2a: How many times did you attend or participate in arts and cultural activities over summer?

Q2c. IF NO / UNSURE AT Q2a: When was the last time you attended or participated in an arts and cultural activity?

Q3. IF PARTICIPATED IN ARTS AND CULTURE ACTIVITIES BEFORE: What motivates you to participate in art and cultural activities? Please select your top 3 motivators from the following list. RANDOMISE ORDER

Interacting with friends and/or family
Being able to go by myself
Bettering my health/well-being
Broadening my perspective or worldview
Connecting to my community
Experiencing new things
Feeling inspired
Feeling like it gives life a deeper meaning
Feeling transported to another place
Feeling welcome
Having fun
Having grown up participating in it
Interest in the content
Learning something new
Relaxing or feeling less stressed
Supporting the cultural world
None of these
Unsure

Q4. How strongly do you agree or disagree with the following statements? RANDOMISE ORDER

- The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public
- It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education
- The arts make me feel good
- All theatre, ballet and opera companies and public art galleries etc should rely on their tickets sales alone
- The arts only helps those people who participate, not the broader community

Q4a. How easy is it for you to access or participate in arts and cultural activities in WA? Please use a scale of 1 to 5, where '1' is "not easy at all" and '5' is "very easy".

- Q4b. How valuable is the role of arts and culture in your life? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q4c. How valuable do you think the role of arts and culture is in the community? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q5a. The Department of Local Government, Sport and Cultural Industries invests in arts and cultural activities to deliver a number of benefits to the Western Australian community. How valuable is the contribution of arts and culture to your sense of community in WA? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q5b. How valuable is the contribution of arts and culture to the identity of the state? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q6a. About \$2.12 per person, per week is allocated by WA Government for arts and cultural activities, services and facilities in WA, including COVID-19 support. Do you consider this amount to be too low, about right or too high?
- Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA? Nothing; \$0.01 - \$1.00; \$1.01 - \$2.00; \$2.01 - \$5.00; \$5.01 - \$10.00; \$10.01 - \$20.00; \$20.01 +; Unsure
- Q7a. The West Australian Government, through Screenwest, provides financial support to help individuals and companies make film, television, and digital media in Western Australia. How valuable do you think the Western Australian film and television industry is to the community? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q7b. How easy is it for you to access Western Australian produced film and television productions? Please use a scale of 1 to 5, where '1' is "not easy at all" and '5' is "very easy".

Demographics

- D1. Age
- D2. Gender
- D3. Postcode
- D4. Region (if Regional WA)
- D5. Do you have any children living at home aged: 0-5 years; 6-11 years; 12-17 years; 18+ years; No children; or, Refused
- D6. What is your highest level of education? High School Leaving Certificate; Diploma or Advanced Diploma; Bachelor Degree; Postgraduate Degree or higher; Other; or, Refused
- D7. What is your combined household income before tax? Nil to \$30,000; \$30,001 to \$75,000; \$75,001 to \$150,000; More than \$150,000; Refused
- D8. Do you, or anyone in your household, identify with the following groups: Person with a disability or impairment; Aboriginal and / or Torres Strait Islander; Born overseas; Mainly speak a language other than English at home; None of the above; or, Refused