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PATTERNMAKERS

JULY 2021

Western Australia Snapshot

Audience Outlook Monitor



Department of
Local Government, Sport
and Cultural Industries

Summary

Audiences in WA have been affected by lockdowns, but most are eager to attend when possible

Around half (53%) of Western Australian (WA) audiences attended an arts event in-person in early July, indicating a significant setback from March 2021 rates of attendance (77%).

After a 'snap' lockdown in Perth and Peel around the time of data collection in July 2021, WA audiences are among the most likely nationally to have had their plans to attend cultural events affected by lockdowns or restrictions in the past four months (79%), behind Victoria (VIC) (82%) and New South Wales (NSW) (84%).

COVID-19 outbreaks in other cities continue to cause disruptions and affect confidence. In early July, audience confidence had been affected by the presence of the Delta strain in WA – but generally remained higher than some other areas. 70% of WA audiences are willing to attend cultural events 'now or as soon as it is permitted' and a further 27% will attend when reasonably confident the risk of transmission is minimal.

WA audiences are committed to the arts but COVID-safety will be important in the wait for vaccination

Audiences in WA expressed frustration and disappointment about the effects of lockdowns on attendance. Some suggested that the unpredictability of 'snap' lockdowns has made them less likely to book events in the long-term – with 47% suggesting that the risk of lockdowns would be a barrier to attendance over the next 12 months. Many also expressed concern that there would not be as many options available (36%).

Audience members in WA want to support artists and venues throughout the pandemic – and some are opting for last-minute or local bookings to combat uncertainty. Most (78%) expect the amount they spend on arts and culture events to stay the same, or even increase, over the next 12 months (stable with 79% in March 2021) – with many wishing to 'make up for lost time' after interruptions to attendance.

Vaccination will play a key role in attendance decisions for many audience members, but COVID-safety measures such as check-in procedures and improvements to ventilation systems can help build confidence in the interim.

Promisingly, WA audience members are being vaccinated at high rates, and the majority (85%) believe the vaccine rollout will be successful enough to allow normal activities to resume within 12 months.

4 in 10 respondents participated online, and 48% are committed to continued engagement

There were 4 in 10 (40%) of WA respondents who had participated in some form of online arts or cultural activity in early July, stable with March 2021 (41%). While participation rates are down from the digital ‘boom’ of the early pandemic (72% in May 2020), these findings suggest a stable cohort of WA audiences with an enduring interest in digital engagement.

When asked what role digital participation plays in their lives when in-person attendance is possible, 48% of WA audiences say that digital programming plays a small (40%) or substantial (8%) role.

1 in 4 WA audience members (23%) responded that they paid to access online content in the fortnight before data collection, down from 32% in March 2021. In line with national trends, WA audiences may be increasingly likely to pay greater amounts for works of corresponding quality.

Introduction

This report summarises insights from over 900 audience members in Western Australia

This Western Australia (WA) Snapshot Report outlines key findings from the July 2021 phase of the Audience Outlook Monitor in Australia (Phase 5), based on responses from 913 audience members connected with arts and culture organisations in WA.

Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic. Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 7 July 2021, participating organisations simultaneously sent the Phase 5 survey to a random sample of their audience — defined as those who had attended an arts or cultural event in person since January 2018. Data collection concluded four days later, on 11 July. A week prior to data collection, the Perth and Peel regions of WA underwent a 4-day 'snap' lockdown in response to community cases of the Delta variant (28 June–3 July).

Almost 9,000 audience members responded across the country, allowing in-depth comparisons of trends in different jurisdictions (noting that results for Tasmania should be interpreted with caution due to its small sample size). An asterisk is used to denote small sample sizes (*).

In addition to this Snapshot Report, the July 2021 results are freely accessible in an interactive dashboard. Users can explore the data for different artforms, types of events and demographic groups in all parts of Australia. For more information about the study, and to access resources such as the dashboard, visit:

www.thepatternmakers.com.au/covid19

Read on for the key July 2021 findings in WA.

Current conditions

Comfort with public activities was set back in early July by community cases of COVID-19

In early July, audiences in WA were somewhat less comfortable with public activities than in March 2021 – with confidence impacted by recent cases of the Delta variant in the state and ongoing outbreaks elsewhere in the country.

While comfort levels generally remain higher than in the early days of the pandemic, the July findings saw a decrease in the proportion of audiences at least somewhat comfortable with going to a local cinema (91%, down from 94%), using public transport (85%, down from 92%), exercising at a gym (70%, down from 83%) or flying domestically on a commercial airline (66%, down from 71%). The proportion at least somewhat comfortable eating at a local restaurant remained stable (97%, stable with 99% in March 2021).

Comfort levels tended to resemble those in states like Queensland (QLD) and Victoria (VIC), which had also recently suppressed case numbers with lockdowns – although WA audiences were somewhat more comfortable exercising at a gym (70% at least somewhat comfortable, compared to 64% in QLD and VIC) and attending cinemas (91%, compared to 84% in QLD and VIC).

Attending cultural events

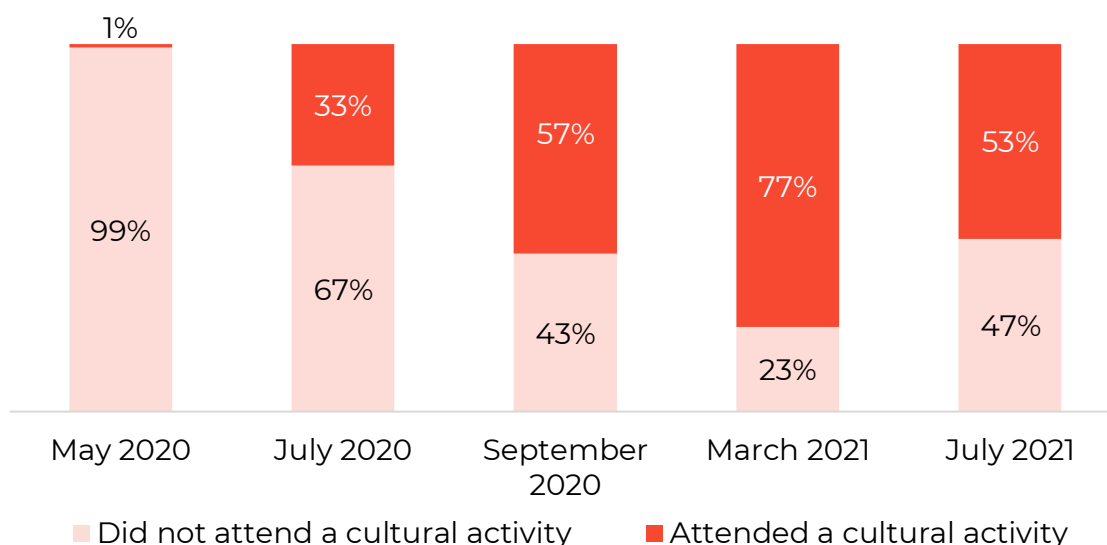
Live attendance in WA has been affected by ‘snap’ lockdowns and ongoing outbreaks nationally

In early July, attendance rates in WA dropped back due to the ‘snap’ lockdown and restrictions in the state, as well as disruption caused by outbreaks elsewhere in the country. Around half (53%) of WA audiences had attended an arts or cultural event in the two weeks prior to data collection (7–11 July 2021) — down from 77% in March 2021. (Figure 1).

Respondents in Perth and Peel were in a ‘snap’ lockdown (28 June–3 July) for part of the two weeks before data collection (23 June–7 July), with opportunities for attendance also affected elsewhere in the state. Prior to the July lockdown, WA had recorded its longest period without any local cases, with phase four restrictions in place.

The proportion attending cultural events was in line with the national average (53%), with community cases of the Delta variant requiring lockdowns across the country. WA attendance rates were lower than states such as SA (74%), but significantly higher than New South Wales (NSW) (34%), which was dealing with an ongoing outbreak at the time.

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (WA) July 2021 (n=913)



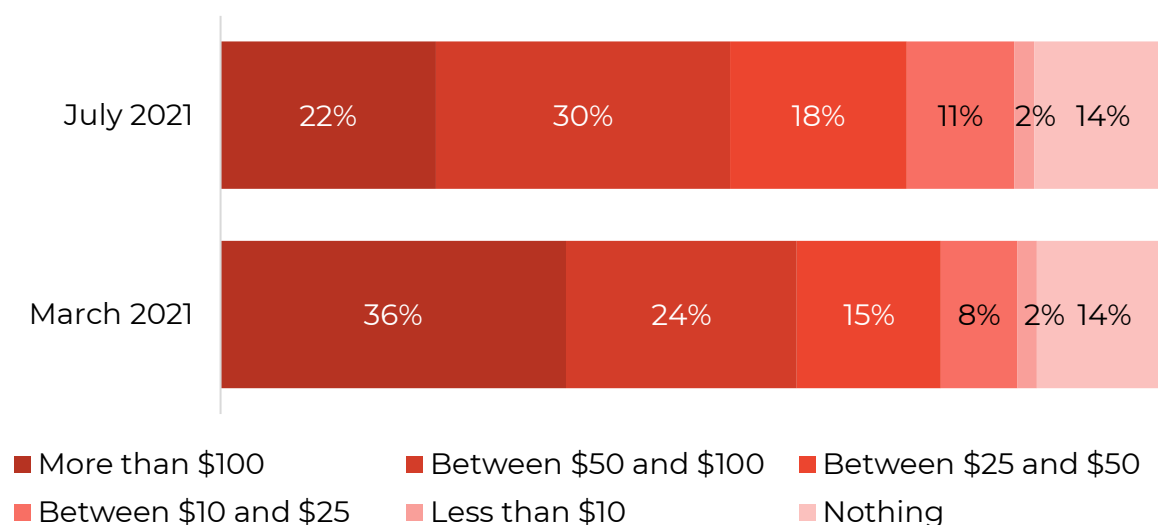
Despite interruptions to live attendance, half of WA audience members spent over \$50 on tickets to cultural events in early July

Although live attendance has been interrupted by lockdowns, 52% of WA audiences reported that they had spent more than \$50 on tickets to in-person activities in the fortnight before data collection – suggesting WA audiences are eager to attend where they can.

This proportion has decreased since March 2021 (when 60% of audiences spent over \$50 on tickets), while the proportion of audiences who did not spend any money on tickets to arts events was stable (14%, stable with March). (Figure 2).

Spending in WA was similar to spending in other states recently affected by lockdowns, such as NSW (50%) and VIC (47%).

Figure 2: In the past fortnight, how much did you spend on tickets to in-person live events and activities? (WA) July 2021 (n=421) and March 2021 (1,388)



Comfort at arts venues remains high across the majority of venue types

Although comfort with public activities was set back in July, comfort at art venues appeared to be affected to a lesser degree – with audience comfort stable for some venues, such as community art spaces or studios (96% at least somewhat comfortable, stable with 97% in March 2021) and museums or galleries (97% at least somewhat comfortable, stable with 99%).

At other venues, confidence was down slightly, such as outdoor festivals or concerts (92% down from 95% in March 2021) and large theatres or concert halls (90%, down from 95%) – but overall remained high.

A smaller proportion of audiences are at least somewhat comfortable at comedy clubs or live music venues (64%, stable with 66% in March), and hands-on exhibits at interactive museums (65%, down from 73%).

Generally, audiences in WA were more comfortable at arts venues than other states with recent lockdowns – and tended to be some of the most comfortable in the country. Results were similar to South Australia (SA), which had not seen any recent cases of COVID-19 at the time of data collection - though WA audiences were slightly less comfortable at outdoor festivals and concerts (92%, compared to 95% in SA).

The proportion of WA audiences who are willing to attend cultural events 'now or as soon as it is permitted' has decreased since March 2021 (70%, down from 80%) but remains the majority. A further 27% state they will attend when reasonably confident the risk of transmission is minimal (up from 19% in March) and only 2% cannot foresee going out until there is no risk (stable with 2% in March).

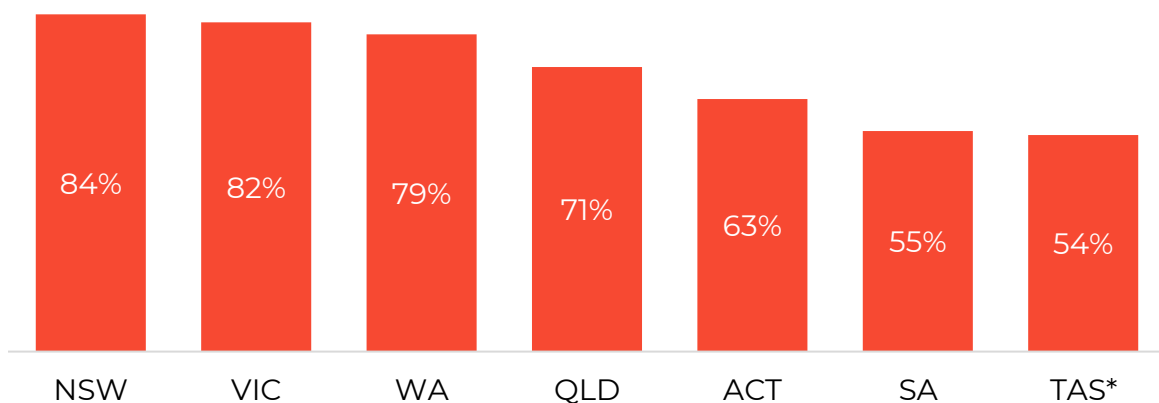
Along with audiences in SA, WA audiences were the most likely in the country to say they would attend as soon as possible.

Impact of lockdowns and restrictions

8 in 10 WA audience members have had their plans affected by lockdowns and restrictions

8 in 10 WA audience members (79%) stated that their plans to attend arts and cultural events had been affected by lockdowns and restrictions in the four months leading up to data collection (7–11 July). This proportion was one of the highest in the country, along with NSW (84%) and VIC (82%). (Figure 3).

Figure 3: In the past four months, have your plans to attend in-person arts and cultural events been affected by lockdowns/restrictions? July 2021 (n=2,160)



When asked how they had been impacted by lockdowns, the majority of WA respondents said that they lived in an area affected by lockdown/restrictions (67%), the event or venue was in an affected area (64%), or the artist they were planning to see was affected by lockdown/restrictions (64%). In a less common scenario, some WA audiences chose not to attend the event due to the risk of travel delays or quarantine (6%). One said,

'My main issue is I am not comfortable booking interstate, as I am concerned about lockdown/quarantine expenses.'

These proportions were most similar to other states which had been locked down prior to data collection, such as VIC, NSW and QLD. They were least similar to states/territories which had not experienced significant outbreaks in early July, such as SA and the Australian Capital Territory (ACT), where attendance was more likely to be inhibited by the risks related to travel rather than being locked down oneself.

Risk of lockdowns and event availability are the primary barriers to attendance for WA audiences

In March 2021, WA audiences were asked 'Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past?'

In July 2021, audiences were asked whether similar factors would affect their attendance over the next 12 months. In the coming year, WA audiences said they were more likely to be deterred from attending by the risk of future lockdowns and cancellations (47%, up from 30% in March 2021) and the fact that there are not as many options available (36%, up from 23%). (Figure 4).

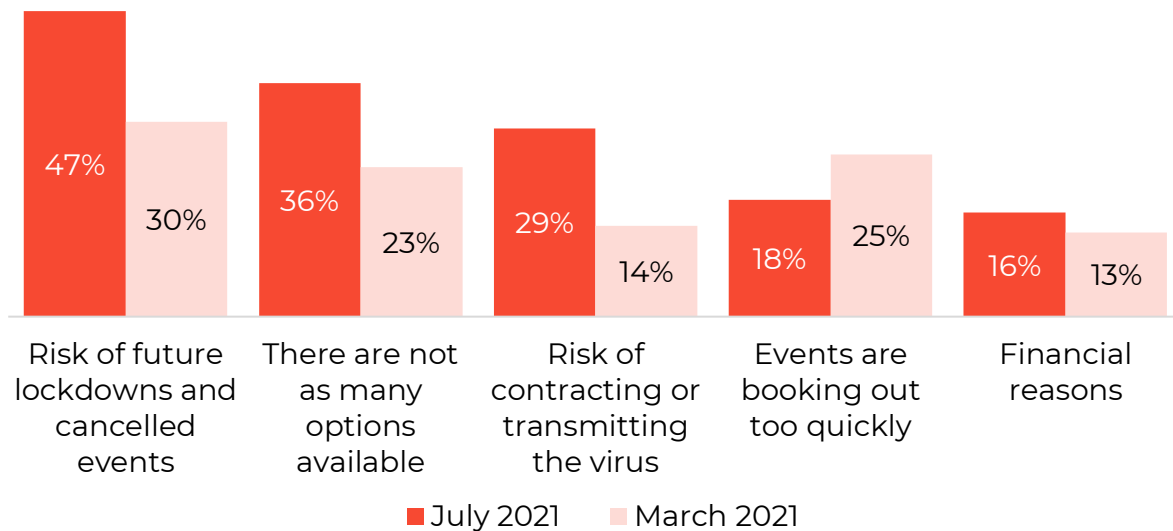
WA audiences were also increasingly likely to cite the risk of contracting or transmitting the virus as a barrier (29%, up from 14% in March 2021) – likely influenced by the presence of the highly infectious Delta strain in the Australian community.

Across jurisdictions, WA audiences were the least concerned about the virus, along with those in SA (27%) — likely due to WA's successful suppression of major outbreaks so far.

Some less common barriers included the fact that events are booking out too quickly (18%, down from 25% March 2021) and financial reasons (16%, up from 13%).

Generally, WA audiences were most similar to SA audiences in regard to factors inhibiting attendance, with SA audiences also citing the risk of lockdowns (46%) and the availability of events (37%) as their primary barriers.

Figure 4: Can you tell us if anything is preventing you from attending in-person arts and culture events as you used to in the past? (select up to three) (WA) July 2021 (n=901)



Lockdowns and cancellations are frustrating for WA audiences, but they are empathetic towards the artists affected

When asked how they had been impacted by their experiences with lockdowns, WA audience members expressed frustration, disappointment and sadness over missed opportunities to engage with the arts. One said,

‘Seeing live experiences is really important to me so when I can’t experience them for a period of time I feel as if it affects my mental health somewhat. The organisers do as much as they can and I feel for them and the artists in this current climate.’

Another said,

‘WASO is a staple in my life - I usually attend every Masters & Classics series, which I have done every year for some 20 years - except for those cancelled because of COVID! My partner & I have been seriously affected by the loss of live classical music & the superb WASO orchestra!’

Some WA audiences have had their confidence shaken by repeated lockdowns and may be more wary about booking events in the future. They noted that conditions can change rapidly due to ‘snap’ lockdowns, creating greater uncertainty about whether events will go ahead.

One said,

'I find booking tickets is no longer exciting. There is instead a feeling of, let's just book it and if it happens that will be a bonus. It's hard to visualise these things actually happening.'

Another said,

'[I'm] frustrated and disappointed. It puts me off booking anything else because of the unpredictability.'

As a positive sign, many WA audience members suggested that cancellations had made them more conscious of how much they value arts attendance. They expressed an awareness of the financial and mental impacts of cancellations upon artists and venues and a desire to support them when possible. One said,

'It is all part of the new life we are living. We are patient and hope that the artists/organisations that provide such a wonderful experience are able to continue and offer such things. We are mindful of how it is affecting this particular sector and are very willing to keep supporting them however we are able.'

Another said,

'I continue to support the Arts as best I can. Love live performances as it lifts the spirit in these uncertain times.'

7 in 10 WA audiences made future plans to attend an event in the fortnight before data collection

Despite the disruptions and uncertainty caused by recent lockdowns across the country, the majority (76%) of WA audiences continue to make firm plans to attend arts and cultural events in the future (down from 83% in March 2021).

Audiences in WA were among the most likely in the country to make future plans in early July, behind SA (85%) and QLD (78%).

The kinds of cultural events WA audiences planned to attend in July were consistent with March 2021, with the largest proportion of audiences planning to attend a live performance (55%), visit a cinema (35%) or visit a museum or gallery (32%).

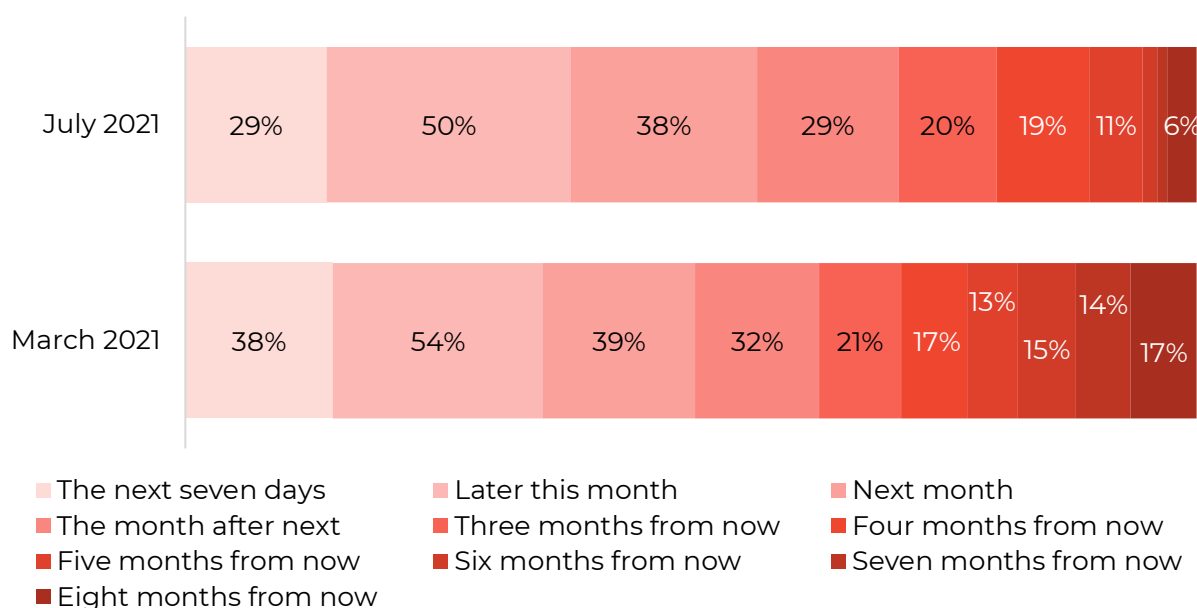
In July, WA audiences were less likely to book events beyond six months from now

In July 2021, WA audiences were less likely to book tickets for events in the next seven days (29%, down from 38% in March) and later in the month (50%, down from 54%) – perhaps because audiences had fewer opportunities for short-term bookings at the time of data collection, when Perth and Peel had just come out of lockdown.

WA audiences were also less likely to book events six months from now (3%, down from 15% in March 2021), seven months from now (2%, down from 14%) or eight months from now or thereafter (6%, down from 17%). (Figure 5).

Likely reflecting what's available, this preference for booking events between 1–5 months from now may also be underpinned by an unwillingness to make bookings too far in the future, given the unpredictability of the present circumstances.

Figure 5: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (WA) July (n=343) and March 2021 (n=685)



Some audience members deal with uncertainty by making last-minute bookings and keeping it local

Comments from WA audiences revealed that some audience members were making a habit of booking events last-minute to avoid having plans cancelled or changed. One WA audience member stated,

'[I'm] annoyed to plan and look forward to things getting cancelled - less likely to make long term plans now. Prefer to see what's on in the coming week knowing it'll likely happen now.'

Another said,

'It has made me plan much closer to event time - now 1-2 weeks (even a couple of days) out as opposed to 4-8 weeks out prior COVID.'

Other audience members have suggested that restrictions on interstate and international travel, and the possibility of future lockdowns or border closures, have led them to preference events in their local area. One said, 'I want to support local artists.'

Building confidence

The option to reschedule, refund or donate tickets is giving WA audiences the confidence to book

Among the WA audiences who experienced event cancellations in the four months prior to data collection (7-11 July 2021), a majority said that they rescheduled or rebooked the event (60%), while 3 in 10 (29%) requested a refund and 24% donated the value of the unused tickets.

Across jurisdictions, WA audiences were some of the most likely to donate their ticket costs, along with NSW (26%) – compared to QLD (15%), VIC (17%) and SA (19%). One WA audience member said,

'I am COVID-19 philosophical. I donate the value of the unused tickets as I want artists to eat and be healthy for the next scheduled performance.'

Generally, WA audiences expressed appreciation for the options made available to them by presenters and had positive feedback about the handling of cancelled events. One said,

'Super grateful for the refunds when shows are cancelled, relieved that we can make the re-scheduled dates for those that have been re-scheduled.'

Not financially out-of-pocket at all, so impact is just disappointment if show cancelled.'

Another said,

'I have been disappointed but absolutely understood the situation was beyond the organisers control. I really appreciated having the option to get a no-fuss refund OR rebooking credit - that was great.'

Audiences will be reassured by clear communication from venues around rebooking and refunds

Some audience members reported that in their experience, rescheduled events can be hard to manage. One WA audience member shared,

'The hardest part has been rescheduling events, particularly when they start back up at the same time.'

Another said,

'[Rescheduling] makes for a lot of confusion in the diary entries. Happy to keep supporting the arts. [I've] requested refunds when others are involved or too many things are cancelled. It certainly makes it clearer in the diary if it is simply cancelled.'

Other audience members suggested that they were concerned with losing money as a result of cancelled events. One audience member said,

'I'm less inclined to book for events that are over \$100 per show due to possible difficulties related to getting a refund.'

Others expressed concern about money 'in limbo' as events are repeatedly pushed back. One said,

'I have been put off booking events (we are still waiting to hear when the event will be rescheduled, but it is unlikely to be rescheduled to a family friendly time so we will probably end up cancelling). In the meantime, I have lent the ticketing company \$100 interest free!'

These responses suggest an opportunity for presenters to reassure and encourage audiences by clearly communicating refund or rebooking policies – and ensuring they are readily available to audiences during booking.

Most WA audiences want to see check-ins and improved ventilation at arts venues

With the Delta strain active in the Australian community, certain COVID-safety measures like mandatory check-ins and improved ventilation will improve the confidence of WA audiences.

When asked to what extent a list of safety measures would encourage or discourage WA audiences to attend an event, the largest proportions said they would be encouraged by the presence of check-in procedures (82%) and improvements to ventilation systems (82%).

Almost half of WA audiences (51%, up from 46% in September 2020) would be encouraged by audiences being required to wear masks inside venues, though 23% (up from 19%) reported they would find this measure discouraging. One WA audience member reported,

‘I’ve no other qualms about attending events, would just prefer not to while mask-wearing is in place as it makes the whole experience less enjoyable.’

Across jurisdictions WA audiences were among the most polarised in terms of their approach to mask-wearing, alongside SA (52% encouraged, 21% discouraged). States like NSW (77% encouraged, 9% discouraged) and the ACT (69% encouraged, 14% discouraged) tended to be more in favour of mandatory mask policies.

Over half (60%) of WA audience members said that they would be encouraged by limiting venue seating capacity to 75% and/or limiting capacity to allow 2 square metres per person (57%) — but some noted that it was important to see these measures executed properly. One said,

‘While the spacing and number restrictions are fine, considering HOW this is done also matters; having a row full of people with random gaps doesn’t seem like it’s the best management.’

Another said,

‘Several times I’ve been to events with 50% capacity and the entire audience is squashed together in the back half of the theatre!’

WA audiences were less in favour of taking temperatures at the entrance to venues — although 45% of audience members would be encouraged by the presence of this procedure, a further 56% felt neutral (39%) or negative (17%) about it.

WA audiences want to be informed in advance of COVID-safe policies — and want to see them in practice

In addition to the above measures, WA audiences stressed the importance of knowing the venue's COVID-safety protocols in advance so they can make informed decisions. Audience members emphasised that they wanted to see these protocols observed and consistently put into practice. One said,

'[I want to see] that they state explicitly which COVID guidelines they have implemented and that they are checking that patrons are complying with the guidelines.'

Another wanted to know,

'Exactly what is required from patrons re COVID risk management and how staff will ensure that is adhered to. E.g. how will staff deal with a noncompliant person.'

When summer arrives, WA audiences will prefer outdoor venues with fixed seating

Looking ahead, WA audiences were asked to rank their preferences for attending events over summer among a list of four different venue types. The largest proportion selected an outdoor venue with fixed seating (45%) as their first preference, followed by an indoor venue with fixed seating (35%) — while only 1 in 10 (12%) preferred an outdoor venue where audiences were free to walk around.

One audience member stated,

'Being outdoors in a controlled environment is the best option to limit virus spread.'

Some responses were motivated by factors other than virus transmission — such as weather, or the quality of the experience. One audience member stated,

'It depends on the show and weather and time of day. I wouldn't want to go to an outdoor event in Perth in the middle of Feb when it is 40 degrees.'

Another said,

'In Perth Concert Hall, we have fabulous acoustics. There are no really great outdoor venues that match it.'

Planning for future attendance

WA audiences want to see a continuation of pre-pandemic programming, though some are looking for light-hearted events

When asked about the types of arts and cultural content that they would be attracted to over the next year, the overwhelming majority agreed that they wanted to see the same kinds of events they used to attend pre-pandemic (94% in July 2021, stable with 92% May 2020).

WA audiences were less likely than in May 2020 to agree that they wanted to see 'works that make sense of the pandemic' (8%, down from 23%) and more likely to be attracted to 'light-hearted programs' (33%, up from 21% in May 2020). One audience member suggested they wanted to see,

'Theatre, opera, orchestral works that are uplifting and familiar.'

8 in 10 of WA audiences expect to spend the same amount or more on cultural events

When asked about their projected spending over the next 12 months, almost 8 in 10 (78%) of WA audiences said they would spend the same amount or more on arts and culture activities, compared to before the health crisis started (stable with 79% in March 2021). There does remain uncertainty about the kinds of events that will be viable in the current climate.

The proportion of WA audiences who planned to spend more or the same was similar to QLD (78%) and SA (78%) and slightly higher than that of audiences in VIC (73%) and the ACT (68%).

1 in 10 (11%) of WA audiences expected their spending to increase over the next 12 months. When asked why, some suggested that money that would have otherwise been spent on travel would be redirected towards arts attendance. Others wished to support artists and venues, particularly those in their local area.

Above all, audiences expressed a desire to make up for lost time and enjoy all that the arts have to offer. They said,

'I am seizing more opportunities because I appreciate all the more how precious they are.'

Another said,

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

1 in 5 WA audience members expect to spend less in the coming year, for both personal and pandemic-related reasons

There are 22% of WA audiences who suggested that they expected their spending over the next 12 months to be less than before the pandemic began.

When asked why they expected to spend less, some WA audience members cited personal reasons including changes to their mobility, financial circumstances, location or availability. Others gave pandemic-related explanations, citing the decreased availability of events, or the challenges posed by restrictions. One said,

‘Restrictions will influence my choice to attend and I imagine this will limit my attendance. I don't expect there will be a wide choice of events, particularly featuring international artists.’

Another said,

‘Because I have learnt to temper my urge to go to things in line with financial and other considerations — less Fear Of Missing Out.’

Vaccination outlook

Vaccination is a key decision factor for many WA audience members

Many WA audience members see the vaccination rollout as a key factor in their decisions to attend cultural events.

When asked what was the most essential information cultural organisations could provide to help them decide whether or not to attend an event, many WA respondents referred to vaccination in their responses. One stated,

'It doesn't depend on cultural organisations...it's about people not being vaccinated.'

Some have suggested they won't return to regular attendance until vaccination rates are higher, with one commenting,

'Until full vaccination of the whole community is above 80%, then an event where people congregate indoors en masse is not an option. The Delta variant shows even passing by an infected person within a metre without any contact can lead to infection.'

WA arts audiences are more likely to be vaccinated against COVID-19 than the general population

WA arts audiences are more likely to have been vaccinated relative to the general population – which may help encourage those audience members who are looking for high vaccination rates before they return to regular attendance.

Almost all (93%) of WA respondents aged 75 and over had been at least partially vaccinated, compared to 73% of Australians over 70 in the general population, based on figures from the Australian Government Department of Health.¹

8 in 10 (80%) WA respondents aged between 55 and 64 had been at least partially vaccinated, compared to around half of the general population.

One-third (33%) of WA respondents under 35 had been at least partially vaccinated, compared to approximately 10% of the general population. Of the two-thirds of audiences under 35 who were not vaccinated, 100% stated that they would probably or definitely get vaccinated when it became available.

¹ Australian Government Department of Health: <https://www.health.gov.au/initiatives-and-programs/covid-19-vaccines/australias-covid-19-vaccine-rollout>

Most WA audiences are confident the vaccination effort will be successful in helping things return to normal

Promisingly, most WA audience members (85%) are at least somewhat confident that the vaccination effort will ultimately be successful in allowing normal activities to resume within a year.

This proportion has decreased since March 2021, when 91% of WA audiences were at least somewhat confident.

WA audiences were in line with the national average (86%) – with NSW audiences the most confident (89% at least somewhat confident) and ACT audiences the least (81% at least somewhat confident).

Online participation

4 in 10 of WA audiences participated in arts and culture online in the fortnight before data collection

4 in 10 (40%) of WA audiences were participating in digital arts and cultural experiences in early July, stable with 41% in March 2021.

The participation rate in WA was similar to that of audiences in QLD (37%) and SA (37%).

It was lower than states such as NSW (50%) and VIC (47%), where digital participation rates have generally been higher throughout the pandemic.

In terms of the types of online experiences, WA audiences were most likely to have watched a pre-recorded video of a performance (22%, stable with March 2021), participated in an online class or tutorial (17%, stable) or watched a live streamed performance (12%, down from 16%) in the two weeks prior to data collection.

1 in 2 WA audiences state that their engagement with online arts and culture will continue beyond the pandemic

In July 2021, audiences were asked, 'When venues are open and it's possible to attend in-person cultural experiences, what role do online arts events/experiences play in your life?'

Around half (48%) of WA audiences say that digital programming plays a small (40%) or substantial (8%) role, confirming the ongoing importance of this area post-lockdown.

This proportion was similar to QLD (48%) and SA (47%) and lower than NSW (57%) and VIC (56%), which generally see higher proportions of audiences online outside of lockdown periods.

Of the WA audience members who expected to continue engaging with online arts and culture in the long-term, many suggested that they would be motivated by the convenience, comfort and safety of at-home viewing. Others suggested that the pandemic had made them aware of the quality and diversity of online arts experiences available.

One WA audience member stated,

'Being a busy mother to four children and having a husband who works away a lot means that it can be difficult to get out. Being able to access cultural activities from home is great! I just don't have a lot of time to participate in recreation in this season of life.'

Another said,

'Well, I love ballet and opera and that now has quite a sophisticated online presence. E.g. opera at the Met. I don't think I'll ever stop that.'

For the 52% of WA audiences that expected digital programming to play no role in their lives, many felt that online experiences were simply no substitute for attending in-person. One said,

'I've attended some online events but they just aren't the same! Although, on some occasions it's meant I could attend something I would never have been able to in person because of cost and distance. So, swings and roundabouts!'

Digital programming can open up the range of events available to WA audience members

Many WA audience members commented on the accessibility and availability benefits of digital programming, suggesting that it allows them to attend events they couldn't otherwise.

Some pointed out that digital audiences are not constrained by physical distance – meaning that WA audiences are able to engage with interstate events or regional/remote audiences with intercity programming. One audience member stated,

'Living in regional WA, it is not always possible to attend visiting exhibitions and performances in person due traveling distance and time involved, so online activities would still be a great option for when unable to attend in person.'

Another said,

'I feel being able to experience art from distant or remote locations from the participant is critical to broader engagement.'

While others pointed out that online engagement provided a chance to see international events. One said,

'We've just registered for online musical events such as jazz performances by overseas artists that we really like, who we've also previously seen live in Perth but aren't likely to see in Perth for the next few years.'

Most WA audiences tune in to digital activities alone, but some use online events to connect with others

When asked how they participated in a digital event or experience, the majority of WA audiences suggested they tuned in alone (72%).

The WA results revealed that there are many ways digital participation can be enjoyed with other people — including watching with other members of one's household (22%), gathering in public to watch a live-streamed event with an audience (12%), tuning in as part of an in-person gathering of friends and family (7%) and connecting online with friends and family who were tuning in elsewhere (9%). One audience member reported,

'Online allows me to bring events to my 94-year-old mother.'

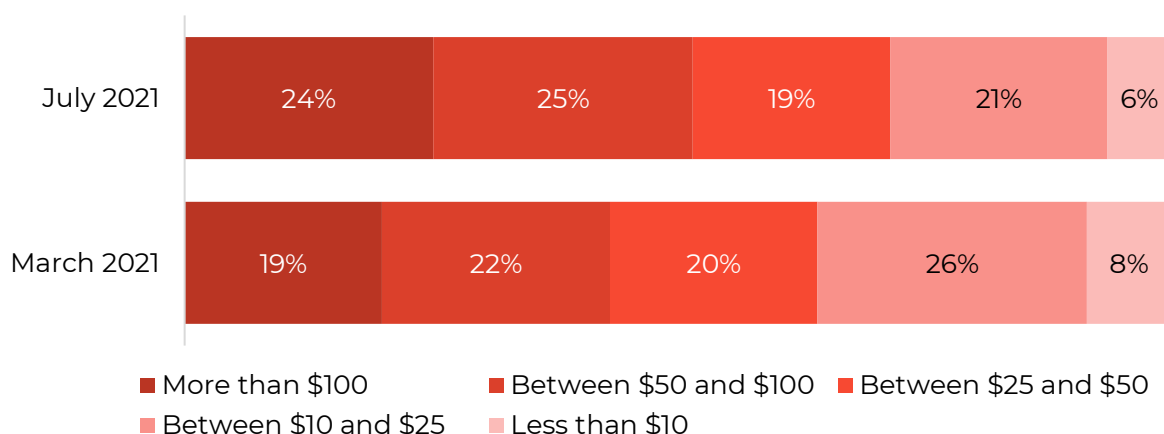
1 in 4 WA audiences are paying to access online content — with an increased proportion spending over \$50

In the fortnight before data collection (7–11 July), 1 in 4 (23%) of WA audience members had paid to access online content (down from 32% in March 2021). WA audiences were the least likely in the country to have paid for digital programming in early July, ten percentage points below the national average (33%).

Participation in some forms of paid online experiences had decreased since March 2021, including one-off pay-per-view arrangements (8%, down from 15%) and subscribing to online platforms (4%, down from 7%). A stable proportion of WA audience members made a donation as an expression of gratitude for an online experience (10%, stable) and subscribed to a season with a digital component (4%, stable with 6%).

Of the audience members in WA who paid for digital content in the last fortnight, around half (49%) spent over \$50 (up from 41% in March 2021). The proportion of audience members spending over \$100 had also increased (24%, compared to 19% in March). (Figure 6). This finding should be interpreted with caution due to the small sample size of the cohort, but is in line with trends observed nationally — suggesting that ‘digital devotees’ are willing to spend on quality online content as the market matures.

Figure 6: Can you share with us your total spending on online arts & culture experiences in the past fortnight? (WA) July 2021 (n=63) and March 2021 (n=86)



What's next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study's Australian homepage at:

www.thepatternmakers.com.au/covid19

There, you can read about the story so far and access a dynamic dashboard, to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

To receive future Snapshot Reports, Fact Sheets and resources in your inbox, as soon as they are available, you can opt in to receive Audience Outlook Monitor news at the link above.

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

Acknowledgment

Patternmakers acknowledges Aboriginal and Torres Strait Islander peoples as the traditional custodians of our land — Australia. We acknowledge the Gadigal people of the Eora Nation as the traditional custodians of the place where Patternmakers is based, and we pay our respects to Elders past, present and emerging.

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