



2020 Arts & Culture Monitor Survey

Prepared for:

Department of Local Government, Sport and Cultural Industries

Prepared by:

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1 Executive Summary

Art and culture continues to be of high importance to the community.

84% agree

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

94% 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 remain at a 12 year high.

When asked 'how valuable is the role of arts and culture in your life?', the Value Index Score is 66.

- This is the equal highest rating over the past 12 years, up from a low of 56 in 2013.
- Perceptions of individual value are lower among males and those with lower levels of education. Regionally, perceived value is lowest in the Wheatbelt, Mid West and Gascoyne.
- Individual value is higher among females, people with higher level education, residents in the western and inner metropolitan suburbs, and those with a disability or impairment.

Arts and culture is seen to have a valuable role in the community with a Value Index Score of 77.

- This is the equal highest score over the past 12 years, up from a low of 68 in 2013.
- Perceptions of community value are relatively similar across the community, though higher among females than males.
- Regionally, community value is lower in the Mid West region.

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

Only 20% agree that "the arts only helps those people who participate, not the broader community".

- Results have remained relatively steady over recent years.
- People with higher education and residents in the Kimberley and Peel are most likely to recognise broader community benefits.

Most believe arts and culture contributes 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 72, on par with recent years.

- The Value Index Score is fairly consistent across the community; slightly higher among females, parents with younger children and residents in the Gascoyne region.

When asked 'how valuable is the contribution of arts and culture to the identity of the state?', the Value Index Score is 73, on par with recent results.

- The Value Index score is fairly consistent across the community; slightly higher among females, people with a disability, in inner north metropolitan suburbs and in the Great Southern and Peel regions.

The arts continue to make people feel good.

The Agreement Index Score is 77; equal to the highest score.

- Level of agreement is similar across the community; slightly higher among females, people with higher levels of education and residents in the western and inner metropolitan suburbs.
- Perceptions vary across the regions. Similar to last year, there is strongest agreement in the Kimberley and lowest agreement in Goldfields-Esperance.

Access to art and culture continues to get easier, but wide gap between metro and regional.

The Ease of Access Index Score has risen to a high of 68, steadily climbing from 53 in 2012.

- 63% feel it is easy to access or participate in arts and cultural activities in WA, up a further 5% points.
- While ease of access is improving and is fairly similar across the community by age, gender, education

and other factors, it continues to be lower for people with a disability or impairment.

- Access also continues to be more difficult for people living in regional WA, especially in the Gascoyne and Pilbara, followed by the Kimberley and Wheatbelt.

Annual participation in the arts was closer to 2018 levels, after stronger results in 2019.

74% of respondents participated in an arts and cultural activity over the past 12 months.

- While participation was down from 82% in 2019, it is more similar to 78% participation in 2018.
- Similarly, participation over summer dropped to 71%, down from 82% in 2019 but closer to summer participation of 74% in 2018.
- Overall, 93% of respondents recalled attending or participating in an arts or cultural activity before, on par with previous results.
- Participation is highest among females and in the western suburbs and increases with level of education and income.
- In the regions, participation is highest in the Kimberley and lowest in the Gascoyne region.

Interest in content and fun are the main motivators for participating in arts and cultural activities.

The top four reasons for participating in arts and cultural activities continue to be an interest in the content, to have fun, to experience new things and to interact with friends and family.

- Interest in the content continues to be the primary motivator for most people, in particular in the Peel region, among seniors and those with higher levels of education.
- Fun continues to be the primary motivator for younger adults, and also for parents with young children and in the Goldfields-Esperance region.
- Interacting with friends and family is the primary motivator in the Wheatbelt, Mid West, western suburbs of Perth, among those on higher incomes and among parents with primary and high school aged children.

Government and corporate support is considered to be essential for the arts. More funding is wanted.

Only 17% of respondents agree with the statement “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”, consistent with earlier years.

76% of respondents would be prepared to contribute more money to expand provision of and access to arts and culture.

- 53% of respondents believe \$2.21 per person per week is too low as an allocation for arts and culture.
- 31% would be willing to pay up to \$2 more per week and 45% would be prepared to pay more than \$2 extra per person per week.
- Views are fairly similar across the community. Younger adults, those with higher levels of education, people with a disability and people who mainly speak a language other than English are more willing to pay over \$2 extra per week.

Perceived value of the WA film and television industry remains high.

72% of respondents rate the industry highly.

- The Value Index Score is 75, on par with results over the past four years.
- Perceived value continues to be higher among low income earners. It is also higher among females, people with a disability and people of Aboriginal and Torres Strait Islander background.
- In the regions, perceived value is highest in the Great Southern and lowest in the Gascoyne.

Perceived access to WA film and TV has remained steady with room to improve.

Only 37% of respondents consider it to be easy to access WA produced film and television productions.

- The Ease of Access Index Score is 53. While consistent with recent years, it continues to be down from a high of 61 in 2017.
- Ease of access is lowest in the Gascoyne, followed by the Pilbara and Wheatbelt regions.

2 Strategic Insights

The following strategic insights are provided for consideration by the Department of Local Government, Sports and Cultural Industries.

Strategic Insight 1

Increase Government investment in arts and culture. The arts are highly valued and 53% of the community believes an allocation of \$2.21 per person by the State Government is too low versus 10% who think it is too high. This view has remained consistent over the past six years.

Strategic Insight 2

Continue to improve access and involvement in arts and culture activities. Although the perceived ease of accessing arts and culture activities in Western Australia has continued to improve, participation and attendance fell slightly this year (noting that the survey collected attendance and participation levels prior to COVID-19's impact on Western Australia).

Strategic areas of focus can include improving access and engagement in areas and groups in the community with lower levels of participation. This includes people who have lower levels of education and income, people with an Aboriginal and/or Torres Strait Islander background, those with a disability or impairment and in the Gascoyne and Wheatbelt regions.

Strategies to reach and engage more people in arts and culture include: novel and cost effective approaches (such as the greater use of digital communication and technologies); encouraging the development of more relevant, interesting content and enjoyable experiences that enable people to engage with family and friends; and developing and targeting arts and culture offers to meet different needs across the community.

Strategic Insight 3

Continue to improve access to arts and culture activities for children. 94% of respondents agree that it's important for children to be able to access art and culture through their education. Innovative and cost-effective approaches that leverage new technologies to reach more children in school, in particular in regional and remote areas, could be considered.

Strategic Insight 4

Continue to support and promote the **Western Australian film and television** industry. Perceived value remains high across the community, in particular among low income earners, those with a disability or impairment and people of Aboriginal and/or Torres Strait Islander background. As these groups are generally less active in arts and culture activities, consider using film and television as a preferred medium to reach and increase their engagement in other arts and culture.

Strategic Insight 5

Perceptions of individual and community value have remained fairly steady. An intervention to help the community to see how arts and culture provides greater value could be considered, such as a campaign to **promote the measurable benefits and value of arts and culture** for individuals and the broader community.

Strategic Insight 6

With increasing competition for sponsorship and donations, novel ways to support arts and culture organisations across Western Australia to reach and engage with people in the community who value arts and culture the most could be considered. Strategies could include appealing for more **philanthropic support** from people who place the highest value on arts and culture, including females and those who are more highly educated. Remarkable times call for remarkable collaboration.

3 The Study

3.1 Summary

Since 2003, the State Government has conducted an annual Arts and Culture Monitor to track behaviour and attitudes towards arts and culture. The 2020 Monitor was managed by the culture and the arts service area of the Department of Local Government, Sports and Cultural Industries (DLGSC). The study assists DLGSC with KPI performance evaluation and strategic planning.

Consistent with previous year, the study was conducted using an online survey. 1,385 online panelists from Thinkfield were randomly selected and invited to complete an online survey between 20 March and 17 April 2020. Quotas were set by age, gender and location to aim to achieve a representative cross section of the community. The final sample was weighted by age, gender and location to match the ABS population profile for Western Australia.

1,385 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	20 March – 17 April 2020					
Sample source	Thinkfield Online Panel					
Total invited	16,649					
Open Rate (# opened)	18% (3,067)					
Sample Size - # completed	1,385					
Response rate*	46%					
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	0.441	0.188	0.166	0.427	0.156	0.090
Goldfields-Esperance	1.282	1.095	0.604	0.551	0.452	1.309
Great Southern	1.836	0.981	0.273	0.888	0.291	0.402
Kimberley	1.066	0.683	0.301	0.619	0.376	0.467
Mid West	2.514	0.447	0.296	0.442	0.295	0.367
Peel	3.034	1.440	0.953	2.936	0.856	1.127
Pilbara	1.386	0.987	0.746	0.488	0.367	0.708
South West	3.206	1.427	0.795	0.862	0.771	0.607
Wheatbelt	0.000	1.220	0.646	1.658	0.659	0.584
Perth	0.911	1.131	1.210	1.155	1.532	1.211

*The response rate is calculated by the number of people 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

49% of respondents were male, 51% were female and less than 1% answered indeterminate.

Age

31% of respondents were aged 17-34 years, 34% were aged 35-54 years and 35% were over 55 years.

Lifestage

36% of respondents had at least one child living at home. 62% of respondents did not have children living at home. This includes single person households, group households, couples without children and empty nesters. 2% refused to answer.

Highest level of education attained

29% of respondents had a high school leaving certificate as their highest level of education, 23% had a diploma or advanced diploma and 35% had a Bachelor Degree or higher. 11% answered 'other' and 2% refused to answer.

Household income

44% of respondents had a combined household income before tax of up to \$75,000 and 43% were earning over \$75,000. 13% of respondents refused to provide this information.

Disability

15% of respondents live in a household where they or someone they live with is affected by a disability or impairment.

Ethnic diversity

28% of respondents live in a household where they or someone they live with was born overseas, 4% live in a household where they or someone they live with mainly speaks a language other than English (LOTE) at home and 3% live in a household where they or someone they live with identifies as being an Aboriginal or Torres Strait Islander Person.

Location

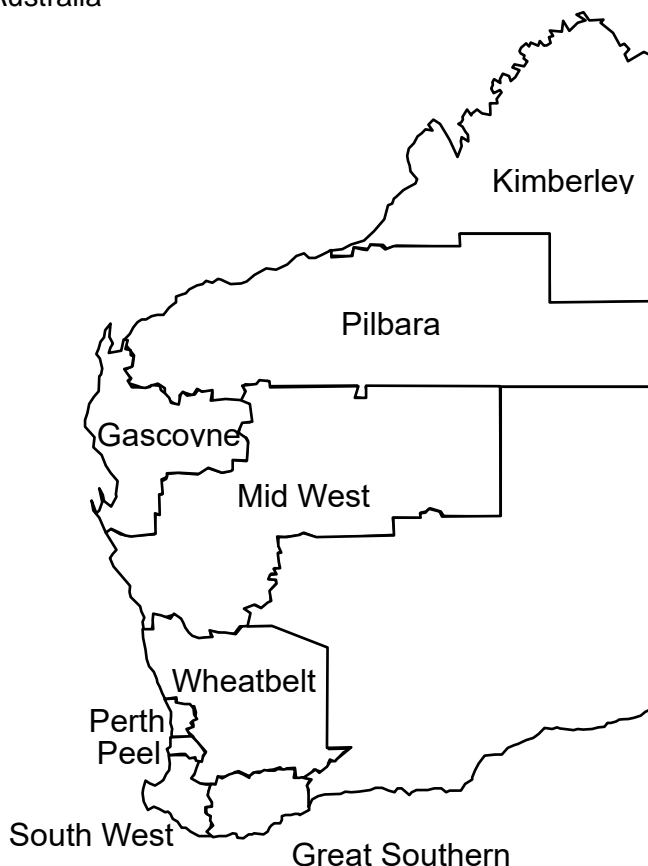
64% of respondents live in the Greater Perth Metropolitan area and 36% live in regional WA.

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; 6162-6199
Regional WA:	6200-6999

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

Map 1: Regions of Western Australia



3.3 Analysis

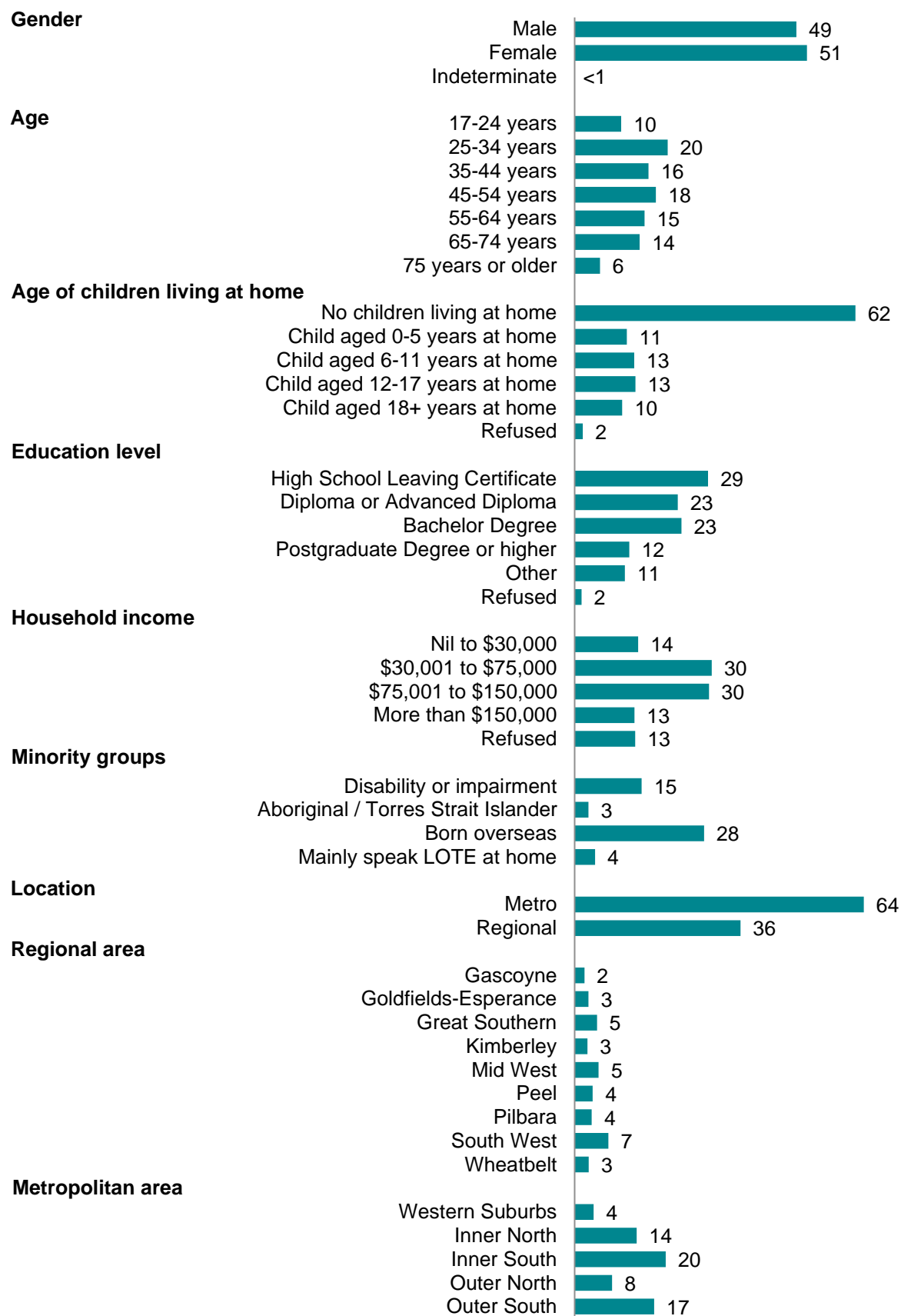
Throughout the report, index scores have been used to show historical analysis and to compare demographic variances across the community. Index scores are used when respondents have been asked to provide an answer on a five point scale such as level of agreement, ease of access and perceived value. The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

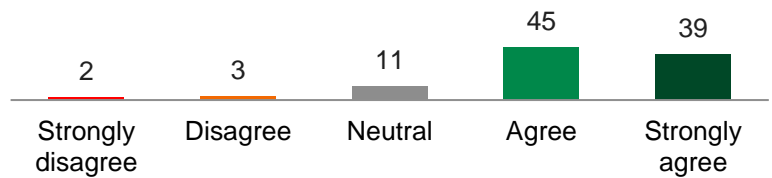
4 The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public

4.1 Level of Agreement

84% 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 5.0 and the Agreement Index Score is 79 out of 100.

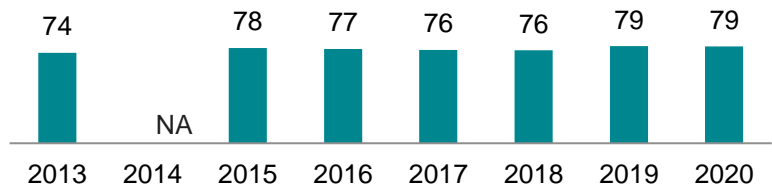
Figure 2: Overall Ratings
% of respondents



4.2 Trend Analysis

The Agreement Index Score equals the highest score to date and has remained relatively steady since 2015 (see Figure 3).

Figure 3: Trend Analysis
Agreement Index Score

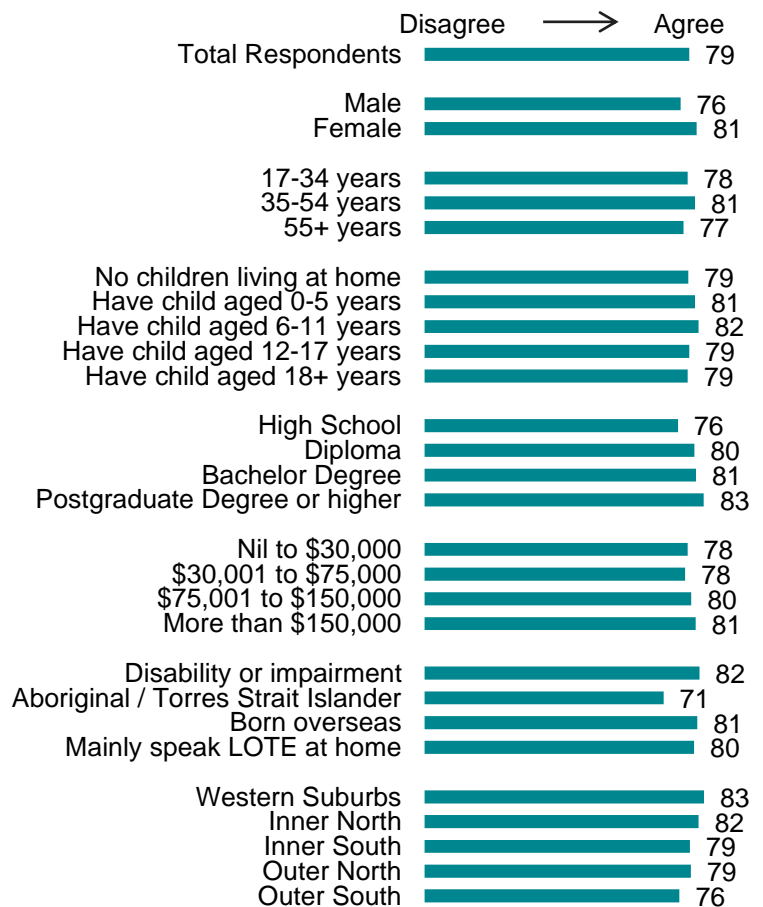


4.3 Community Variances

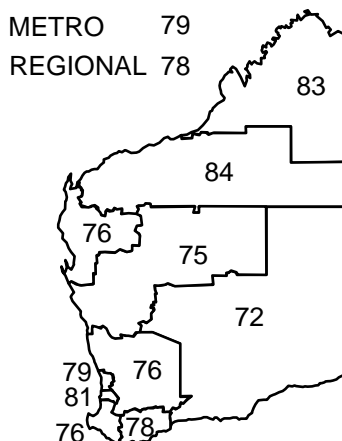
The Agreement Index Score is consistently high across the community with the highest scores among people with a higher level of education and those living in the Western Suburbs (see Figure 4).

Across the regions, those in the Pilbara and Kimberley 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 = 1357) NB: 2% of all respondents answered 'unsure'

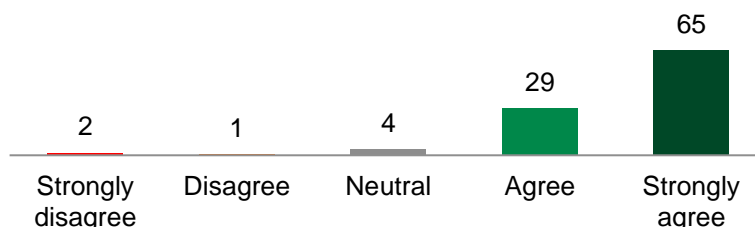
5 It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education

5.1 Level of Agreement

94% 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 5.0 and the Agreement Index Score is 89 out of 100.

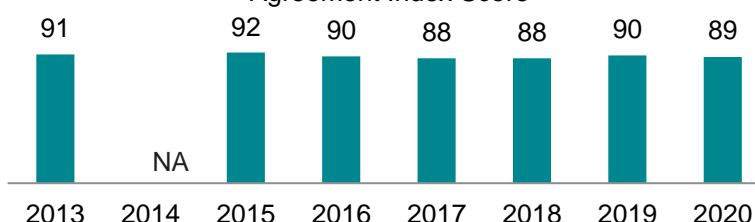
Figure 5: Overall Ratings
% of respondents



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

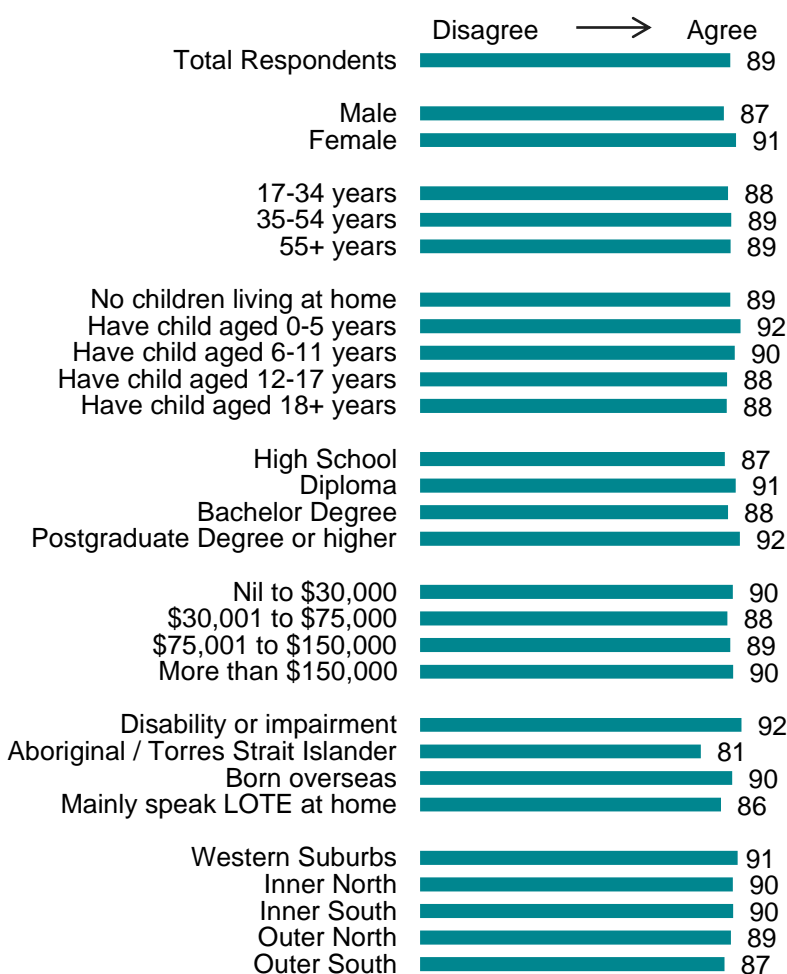


5.3 Community Variances

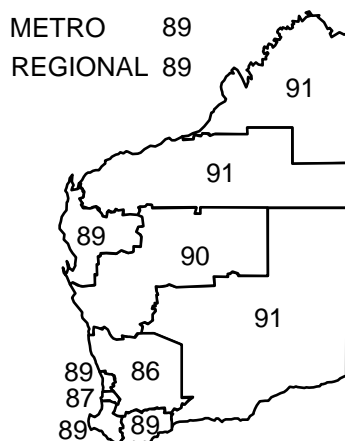
The Agreement Index Score is consistently high across the community (see Figure 7) and across regional areas (see Map 3), ranging from a score of 81 to 92.

People of Aboriginal and Torres Strait Islander background were a little less likely to agree.

Figure 7: Community Variances
Agreement Index Score



Map 3: Regional 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 = 1366) NB: 1% of all respondents answered 'unsure'

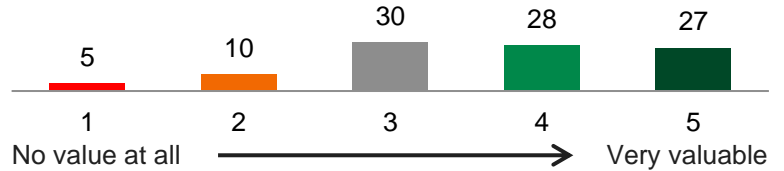
6 Perceived value of arts and culture for individuals

6.1 Overall Ratings

When asked 'how valuable is the role of arts and culture in your life?' 55% of respondents rate value highly (see Figure 8).

The mean score is 3.6 out of 5.0 and the Index Score is 66 out of 100.

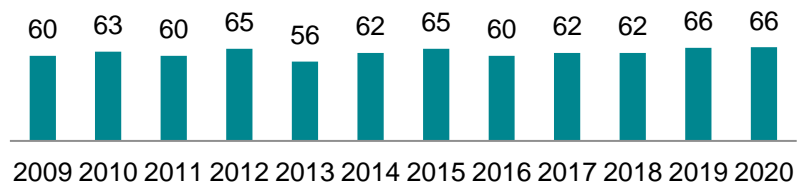
Figure 8: Overall Ratings
% of respondents



6.2 Trend Analysis

At 66, the Value Index Score is the equal highest rating to date. The lowest rating was 56 in 2013 (see Figure 9).

Figure 9: Trend Analysis
Value Index Score

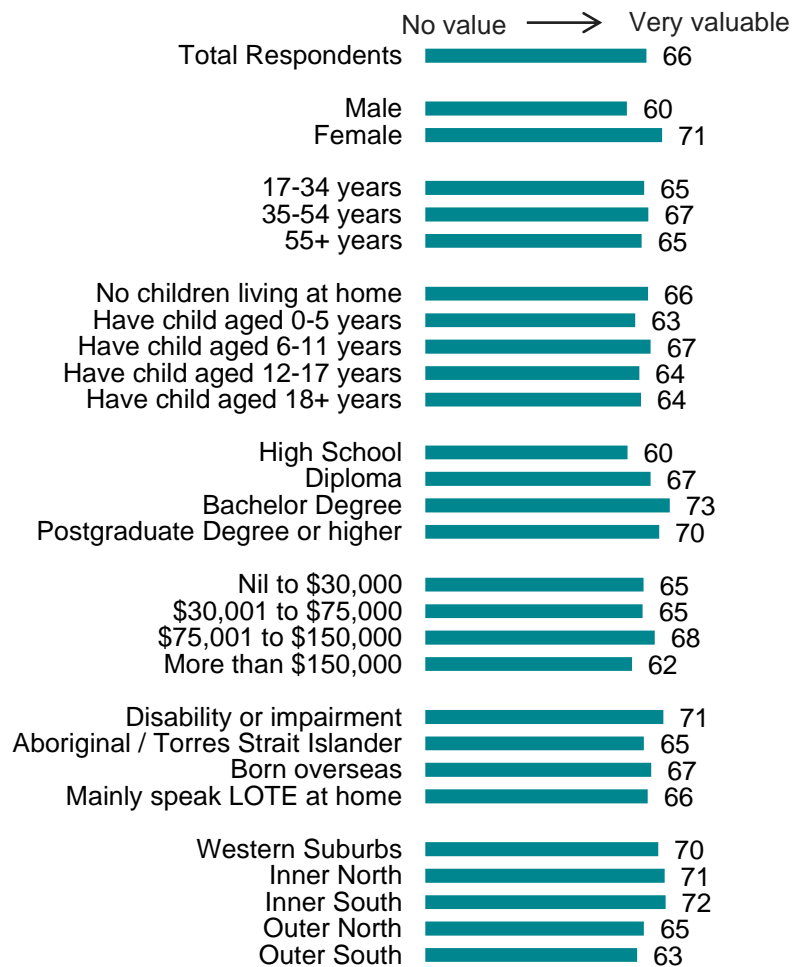


6.3 Community Variances

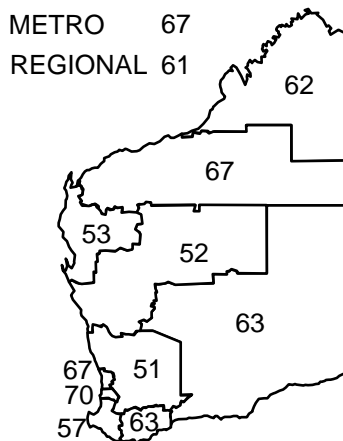
Perceived value is higher among females, those with higher levels of education, people in the western and inner suburbs of Perth and people with a disability or impairment (see Figure 10).

Across the regions, perceived value is higher in the Peel region and lower in the Wheatbelt, Mid West and Gascoyne (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 = 1343) NB: 3% of all respondents answered 'unsure'

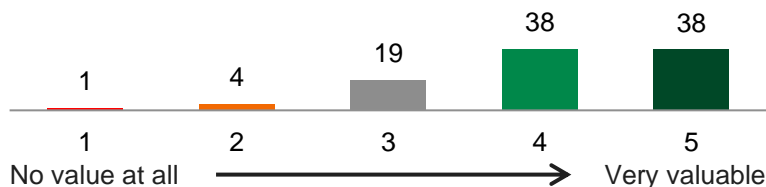
7 Perceived value of arts and culture for the community

7.1 Overall Ratings

When asked 'how valuable do you think the role of arts and culture is in the community?' 76% of respondents rate value highly (see Figure 11).

The mean score is 4.1 out of 5.0 and the Index Score is 77 out of 100.

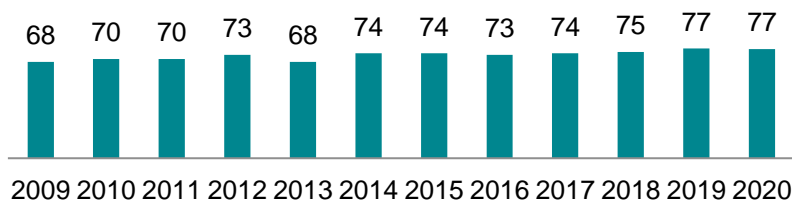
Figure 11: Overall Ratings
% of respondents



7.2 Trend Analysis

At 77, the Value Index Score is the equal highest score achieved over the past 12 years (see Figure 12).

Figure 12: Trend Analysis
Value Index Score

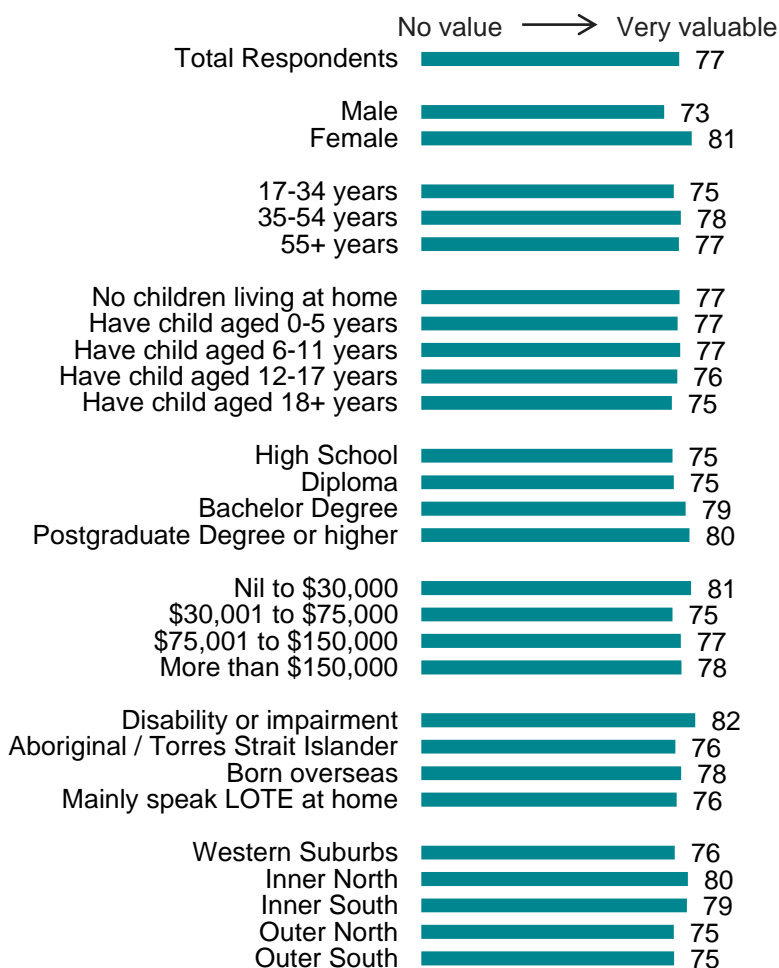


7.3 Community Variances

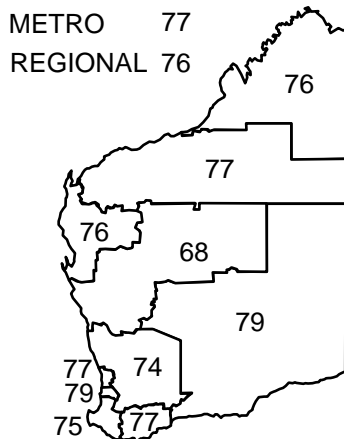
Community value is relatively consistent across the community, however, perceived value is higher among females than males (see Figure 13).

Across the regions, there is greatest room to improve perceived value in the Mid West region (see Map 5).

Figure 13: Community Variances
Value Index Score



Map 5: Regional Variances
Value Index Score



Q4c. How valuable do you think the role of arts and culture is in the community?

Base: All respondents, excludes unsure (n = 1335) NB: 4% of all respondents answered 'unsure'

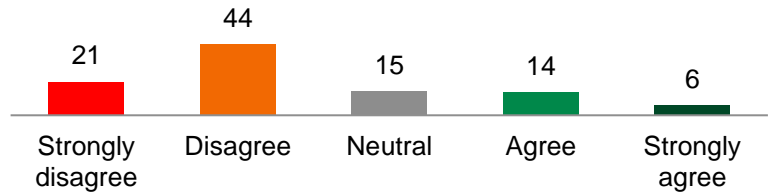
8 The arts only helps those people who participate, not the broader community

8.1 Level of Agreement

Just 20% of respondents agree “the arts only helps those people who participate, not the broader community”. 65% disagree with the statement; they think the arts helps the broader community (see Figure 14).

The mean score is 2.4 out of 5.0 and the Index Score is 35 out of 100.

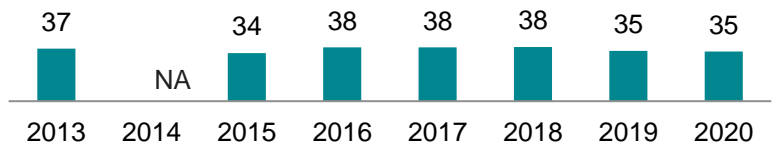
Figure 14: Overall Ratings
% of respondents



8.2 Trend Analysis

The Agreement Index Score has remained steady at 35. The score has been fairly consistent over the years, ranging from 34 to 38 (see Figure 15). Most people continue to think the arts helps the broader community.

Figure 15: Trend Analysis
Agreement Index Score

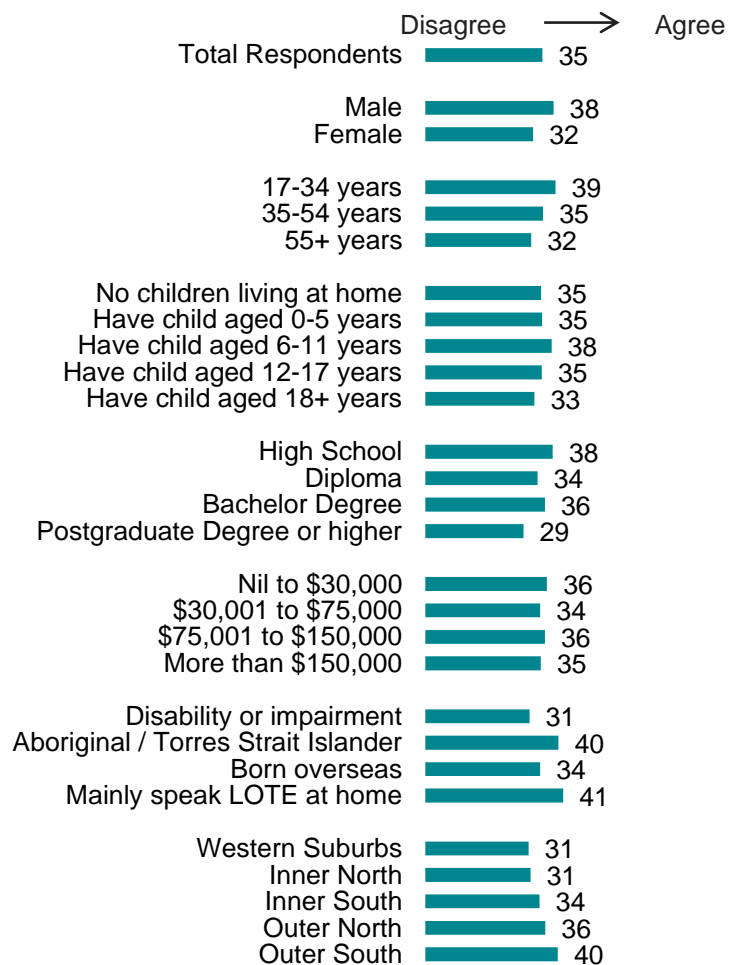


8.3 Community Variances

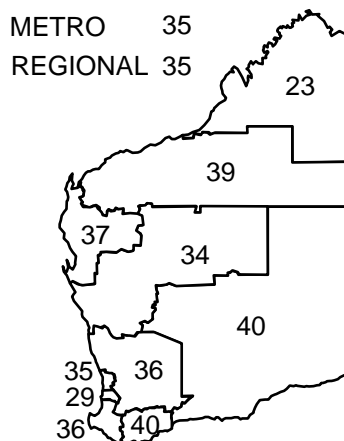
People with higher levels of education, those living in the western and inner north suburbs and people with a disability are less likely to agree with the statement (see Figure 16); they are more likely to think the arts helps the broader community.

Similarly, respondents in the Kimberley and Peel have a lower Agreement Index Score. They are also more likely to think the arts helps the broader community (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 = 1331) NB: 4% of all respondents answered 'unsure'

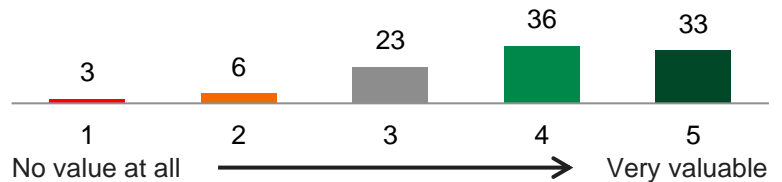
9 Value of arts and culture's contribution to creating a sense of community

9.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA?' 68% of respondents rate value highly (see Figure 17).

The mean score 3.9 out of 5.0 and the Index Score is 72 out of 100.

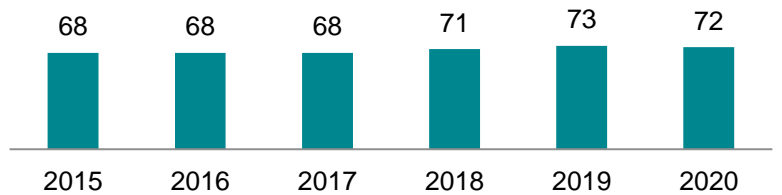
Figure 17: Overall Ratings
% of respondents



9.2 Trend Analysis

The Value Index Score is on par with recent years (see Figure 18).

Figure 18: Trend Analysis
Value Index Score

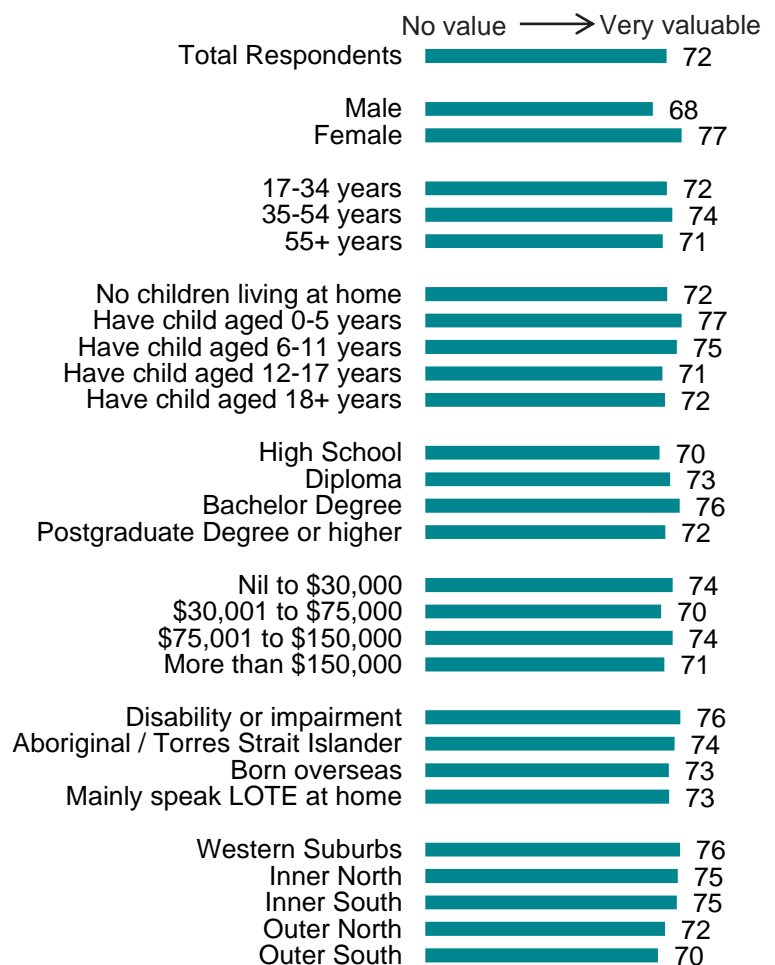


9.3 Community Variances

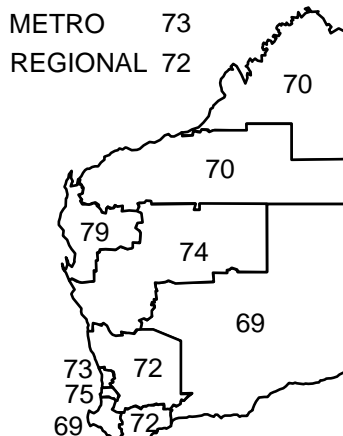
Perceived value is fairly consistent across the community. The highest scores are provided by females and those with younger children. The lowest scores are provided by males (see Figure 19).

Across the regions, perceived value is highest in the Gascoyne (see map 7).

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 = 1301) NB: 6% of all respondents answered 'unsure'

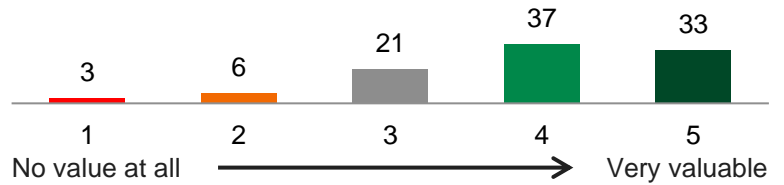
10 Value of arts and culture's contribution to creating a sense of identity

10.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to the identity of the state?' 70% of respondents rate value highly (see Figure 20).

The mean score is 3.9 out of 5.0 and the Index Score is 73 out of 100.

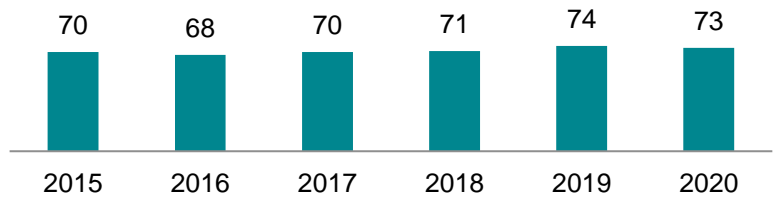
Figure 20: Overall Ratings
% of respondents



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

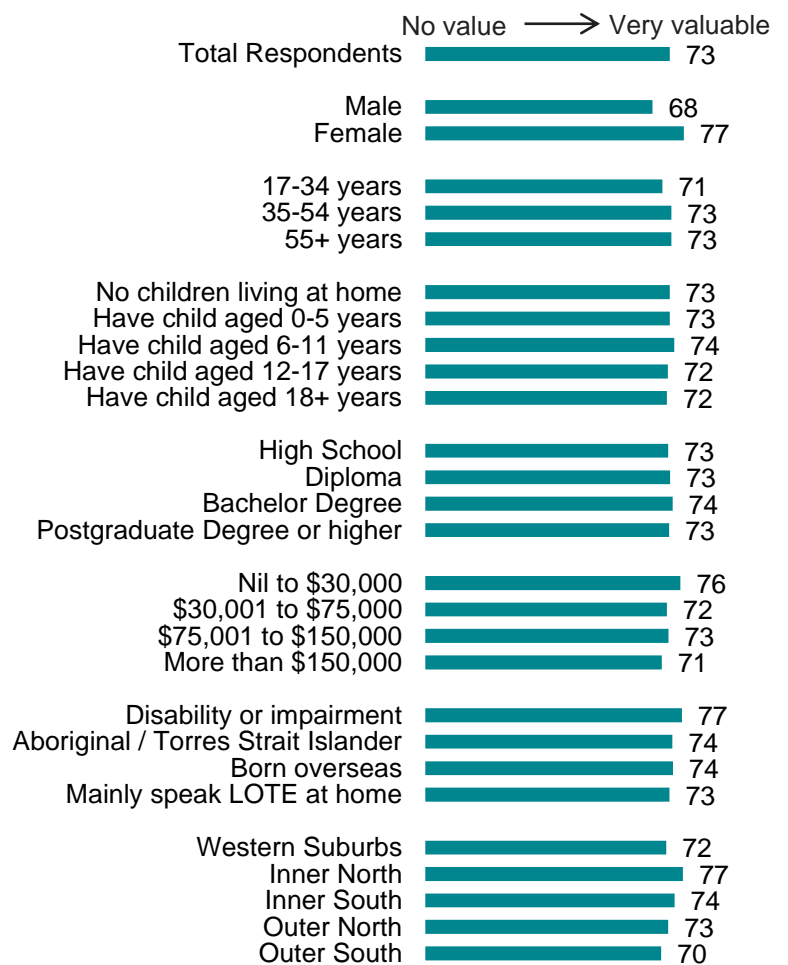


10.3 Community Variances

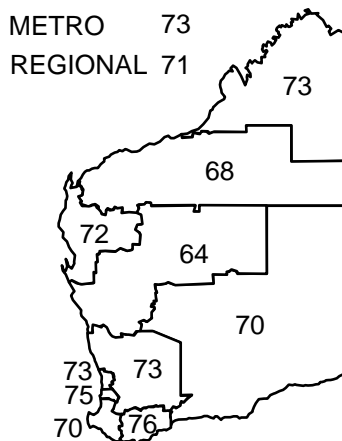
Perceived value is fairly consistent across the community. The highest scores are provided by females, people with a disability and those in the inner north suburbs. The lowest scores are provided by males (see Figure 22).

Across the regions, perceived value is highest in the Great Southern and Peel (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 = 1295) NB: 7% of all respondents answered 'unsure'

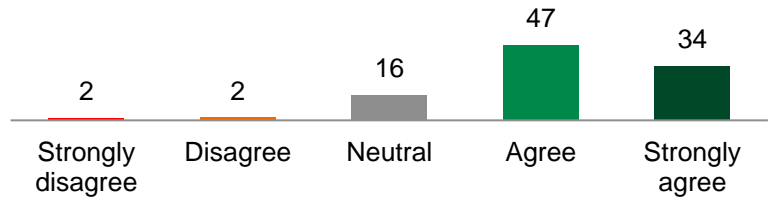
11 The arts make me feel good

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 5.0 and the Index Score is 77 out of 100.

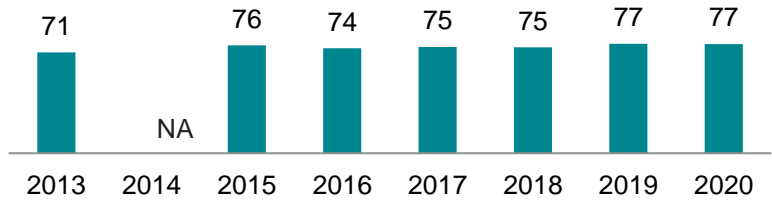
Figure 23: Overall Ratings
% of respondents



11.2 Trend Analysis

At 77, the Agreement Index Score is the equal highest score achieved over recent years (see Figure 24).

Figure 24: Trend Analysis
Agreement Index Score

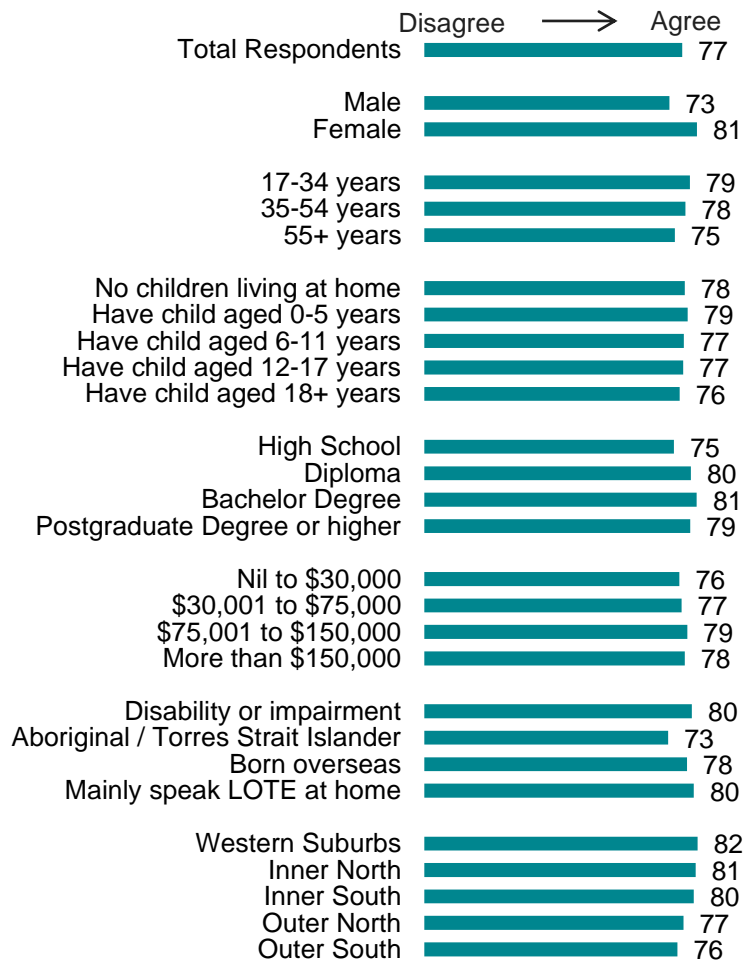


11.3 Community Variances

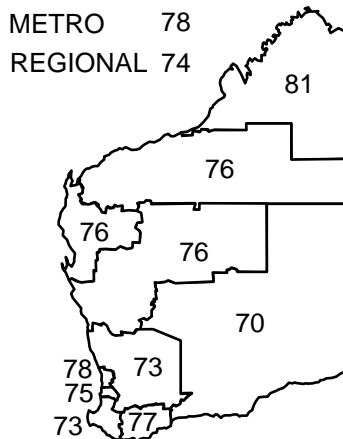
Level of agreement is fairly similar across the community; slightly higher among females, people with higher levels of education and residents in the western and inner suburbs. It is lowest among males, and people with an Aboriginal and Torres Strait Islander background (see Figure 25).

Across the regions, agreement is highest in the Kimberley and lowest in the Goldfields-Esperance region (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 = 1365) NB: 1% of all respondents answered 'unsure'

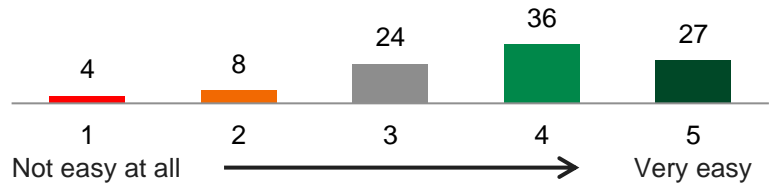
12 Ease of accessing or participating in arts and cultural activities in WA

12.1 Overall Ratings

63% of respondents believe it is easy to access or participate in arts and cultural activities in WA, giving a rating or 4 or 5 out of 5 (see Figure 26).

The mean score is 3.7 out of 5.0 and the Index Score is 68 out of 100.

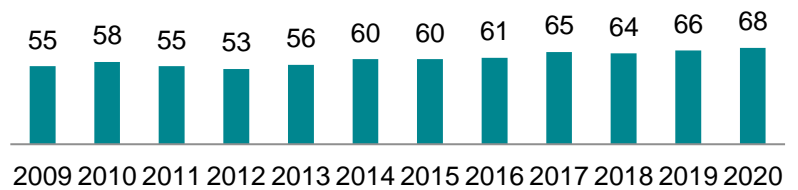
Figure 26: Overall Ratings
% of respondents



12.2 Trend Analysis

At 68, the Ease of Access Index Score is at its highest to date and steadily climbing up from a low of 53 in 2012 (see Figure 27).

Figure 27: Trend Analysis
Ease of Access Index Score



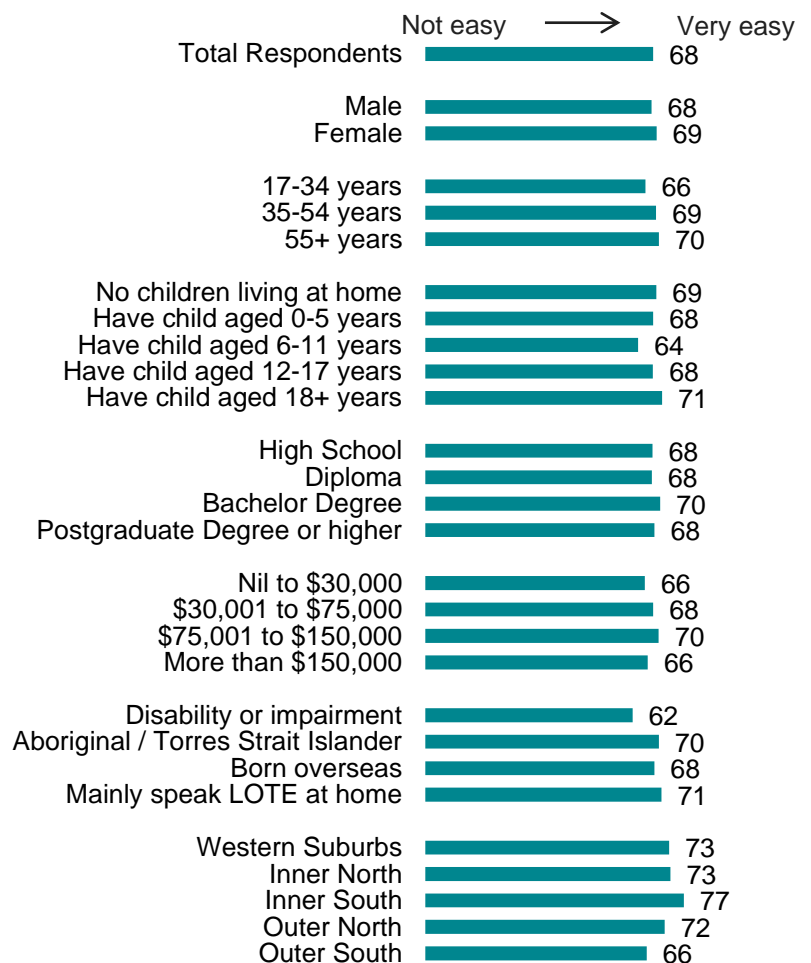
12.3 Community Variances

Ease of access is fairly consistent across the community but varies based on location.

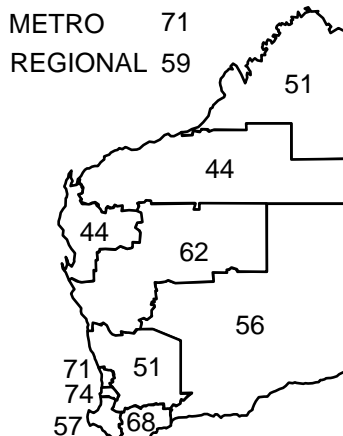
Access is most difficult for those with a disability or impairment (see Figure 28).

Across the regions, ease of access is most difficult for those in the Gascoyne and Pilbara, followed by the Kimberley and Wheatbelt (see Map 10).

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?

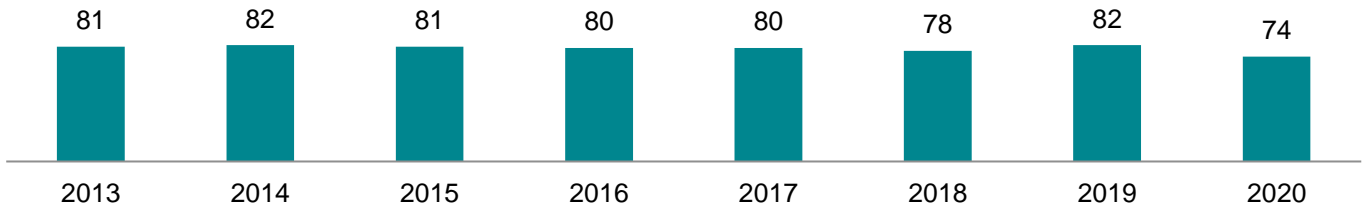
Base: All respondents, excludes unsure (n = 1282) NB: 7% of all respondents answered 'unsure'

13 Attendance and participation in arts and cultural activities in WA

13.1 Attendance and participation over the past 12 months

In 2020, annual participation in the arts appeared to drop slightly with 74% of respondents saying they attended or participated in an arts or cultural activity in the past twelve months (see Figure 29). Survey participants had been informed that arts and cultural activities included a range of activities such as the cinema, music, theatre, dance, visual arts, opera, festivals, libraries, galleries, museums, archives and community cultural events.

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=1,342)

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 in arts and culture activities is greater among females and those who live in the western suburbs, and increases with level of education and income (see Figure 30).

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

Map 11: **Regional Variances**
Ease of Access Index Score

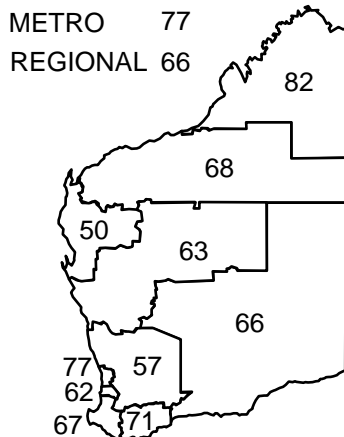
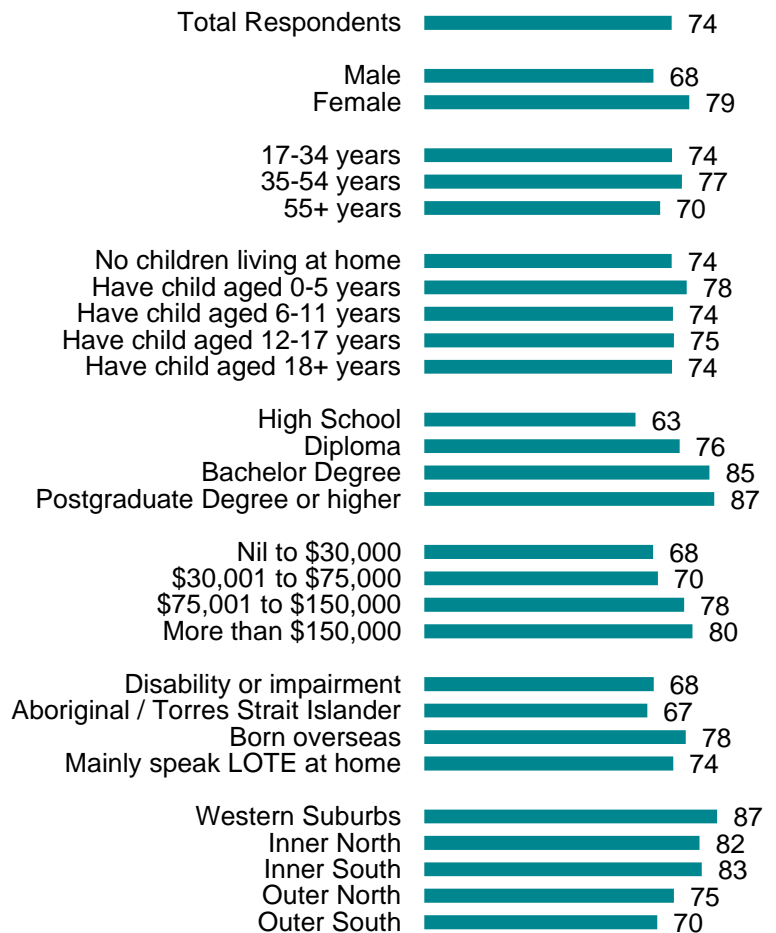


Figure 30: **Community Variances**

% of respondents who attended or participated in arts and cultural events in the past 12 months

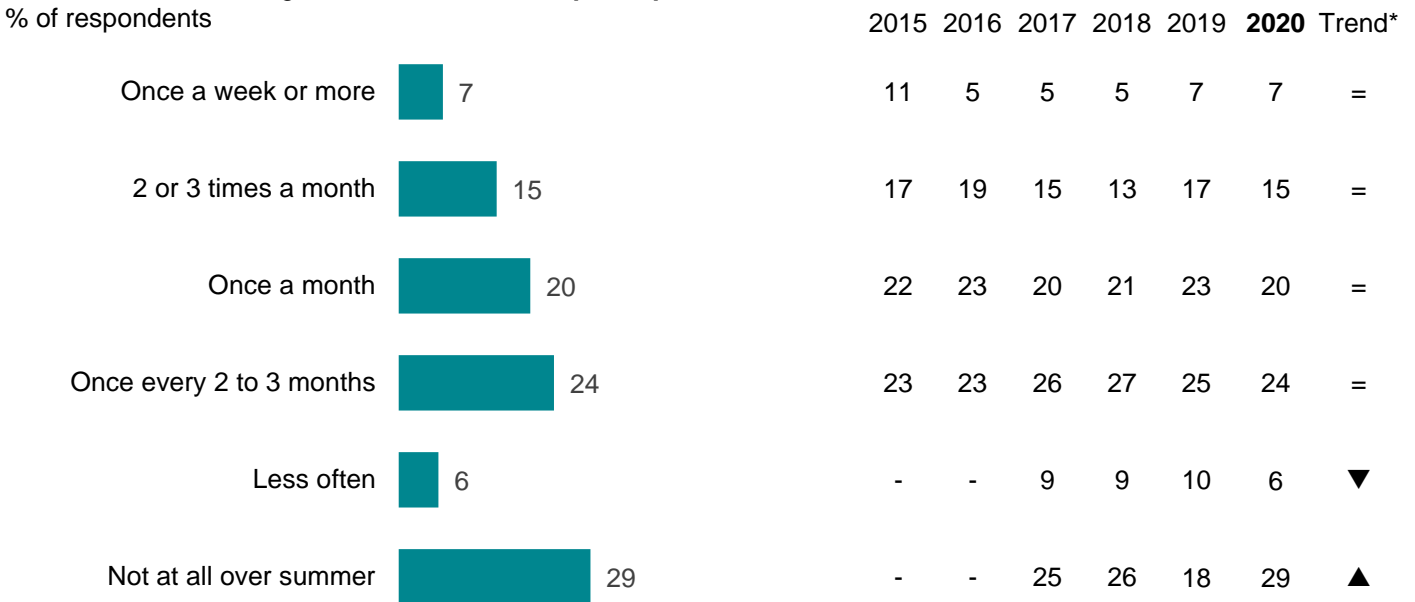


13.3 Frequency of attendance and participation in arts and culture over summer

Participation in the arts and culture over summer dropped slightly with 71% attendance. While this compares to 82% in 2019, it is closer to attendance levels of 74% in 2018 and 75% in 2017.

Over summer, 7% of respondents had attended once a week or more, 15% had attended two or three times per month, 20% had attended once a month, 24% had attended once every two to three months, and 6% had attended less often (see Figure 31). 29% of respondents did not attend or participate in any the arts or culture activities over summer.

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



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

Base: All respondents, excludes unsure (n = 1311)

Please note variations in the questions from 2013 to 2019:

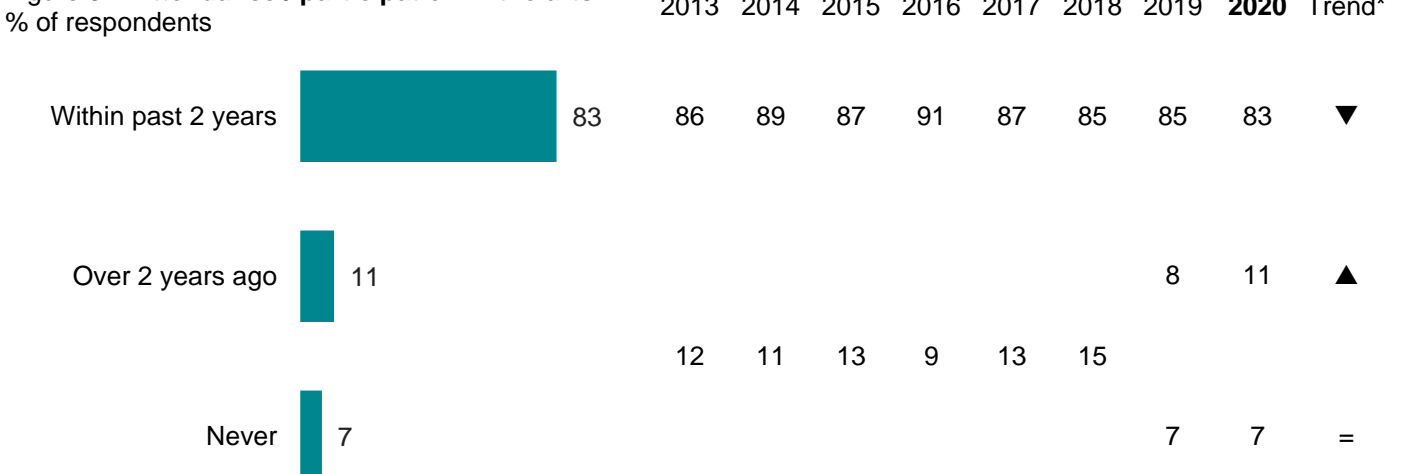
2019 Q2. How many times did you attend or participate in arts and cultural activities over summer?

2013-2018 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

93% of respondents could recall attending and 7% could not recall attending an arts or cultural activity before (see Figure 32). Most (83%) have attended an arts or culture activity within the past two years.

Figure 32: Attendance / participation in the arts



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

Base: All respondents, excludes unsure (n = 1321)

Please note variations in the questions from 2013 to 2019:

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

2013-2018 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

Frequent participation (attended events at least once a month over summer) is more common in the Kimberley and Western Suburbs, and among those with higher levels of education (see Table 3). Frequent participation also tends to be higher among females than males. Frequent participation is lowest in the Gascoyne, followed by the Goldfields-Esperance, Wheatbelt and Mid West.

Non-attendance (never attended) is most likely in the Mid West and Gascoyne, among people with an Aboriginal or Torres Strait Islander background, and when high school is the highest level of education.

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

% of respondents	At least once a month over summer	At least once over summer	At least once in the past year	Have attended before	Never attended
Total respondents	41	71	74	93	7
Male	36	66	68	91	9
Female	46	76	79	96	4
17-34 years	43	73	74	91	9
35-54 years	42	74	77	95	5
55+ years	39	67	70	94	6
No children living at home	42	71	74	93	7
Have child aged 0-5	39	75	78	94	6
Have child aged 6-11	43	72	74	94	6
Have child aged 12-17	37	70	75	94	6
Have child aged 18+	43	71	74	96	4
High School	28	60	63	89	11
Diploma	42	74	76	98	2
Bachelor Degree	54	83	85	98	2
Postgraduate Degree or higher	58	84	87	97	3
Nil to \$30,000	36	64	68	91	9
\$30,001 to \$75,000	37	65	70	93	7
\$75,001 to \$150,000	47	76	78	95	5
More than \$150,000	41	76	80	94	6
Disability or impairment	45	65	68	91	9
Aboriginal / Torres Strait Islander	45	66	67	84	16
Born overseas	44	76	78	94	6
Mainly speak LOTE at home	42	68	74	89	11
Metro	44	75	77	94	6
Regional	34	60	66	91	9
Western Suburbs	62	89	87	98	2
Inner North	55	79	82	98	2
Inner South	51	82	83	96	4
Outer North	40	75	75	94	6
Outer South	32	65	70	90	10
Gascoyne	19	46	50	90	10
Goldfields-Esperance	21	56	66	83	17
Great Southern	39	70	71	100	0
Kimberley	45	77	82	97	3
Mid West	28	59	63	82	18
Peel	37	55	62	90	10
Perth	44	75	77	94	6
Pilbara	34	61	68	97	3
South West	39	63	67	90	10
Wheatbelt	24	51	57	92	8

14 Motivations for participating in arts and cultural activities

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

The main difference in motivators from 2019 to 2020 was that learning something new declined slightly.

Figure 33: **Top motivators for participating in art and cultural activities**
% of respondents

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

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 art and cultural activities, excludes unsure (n = 1224)

As shown in table 4 (overleaf), having interest in the content is the primary motivator for most groups in the community. It received the highest mentions in the Peel region, among seniors (aged 55+) and among those with higher levels of education.

Fun is the primary motivator for parents with young children (0 to 5 years old), younger adults and residents in the Goldfields-Esperance region.

Interacting with friends and family is the primary motivator in the Wheatbelt, Mid West, western suburbs of Perth, among those on higher incomes and among parents with primary and high school aged children.

Although experiencing new things is never the primary driver, it is more of a motivating factor for people in the Peel and Gascoyne regions.

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

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

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 art and cultural activities, excludes unsure (n = 1224)

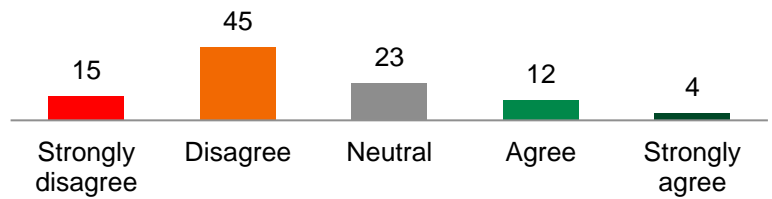
15 Few people agree that arts companies should rely on ticket sales alone

15.1 Level of Agreement

Only 17% of respondents agree with the statement “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”. 60% disagree with this statement (see Figure 34).

The mean score is 2.5 out of 5.0 and the Index Score is 36 out of 100.

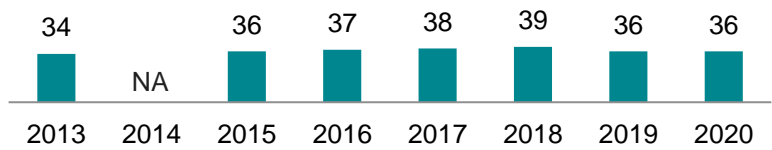
Figure 34: Overall Ratings
% of respondents



15.2 Trend Analysis

The Agreement Index Score has remained steady at 36 after dropping from a high of 39 in 2018 (see Figure 35).

Figure 35: Trend Analysis
Agreement Index Score

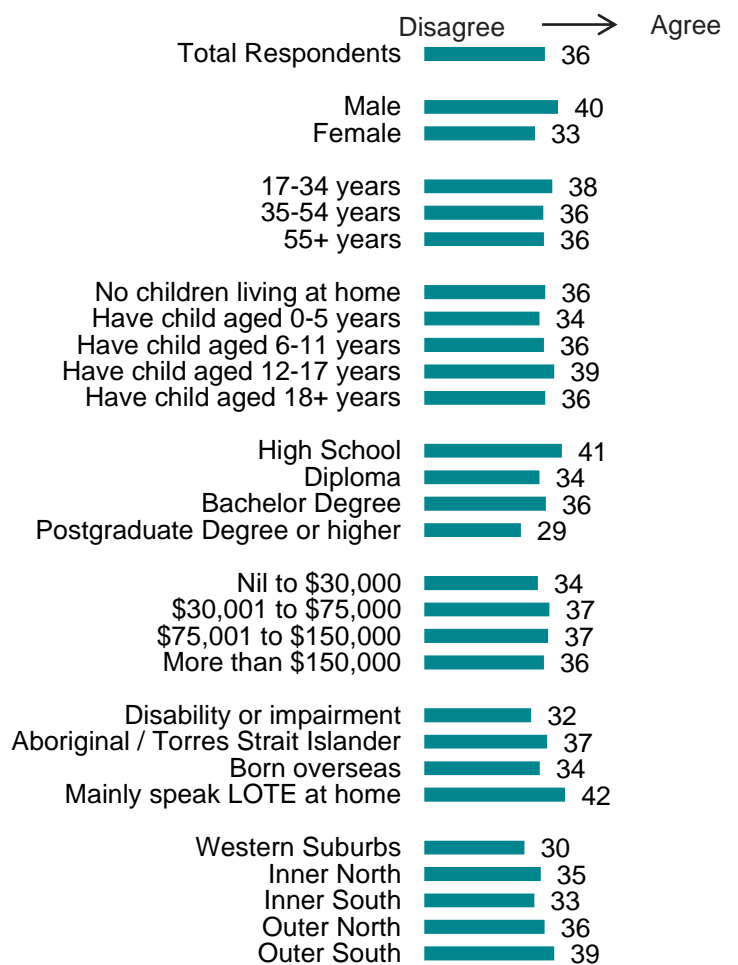


15.3 Community Variances

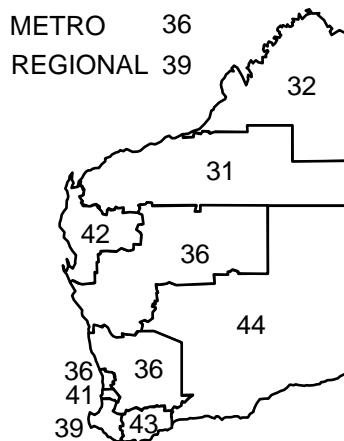
The greatest variance is by level of education. Those with higher levels of education are more likely to disagree that arts organisations should rely on their tickets sales alone (see Figure 36).

Across the regions, residents in the Pilbara and Kimberley are more likely to disagree that arts organisations should rely on their tickets sales alone (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 = 1294) NB: 7% of all respondents answered 'unsure'

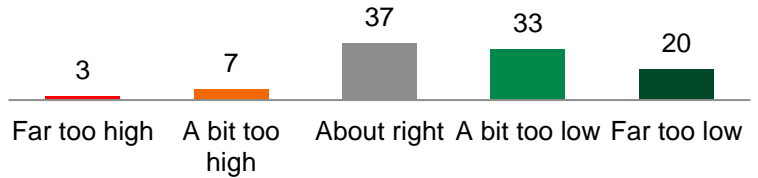
16 Perceptions of WA Government's allocation of just under \$2.21 per person per week for arts and cultural activities, services & facilities

16.1 Level of Agreement

When asked whether \$2.21 per person per week in allocation by WA Government for arts and cultural activities was too low, about right or too high, 53% thought it was too low (see Figure 37).

The mean score was 3.6 out of 5.0 and the Index Score was 65.

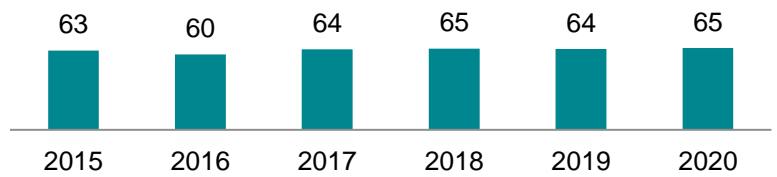
Figure 37: Overall Ratings
% of respondents



16.2 Trend Analysis

The Funding Allocation Index Score has remained steady (see Figure 38) with a tendency towards the funding allocation being low.

Figure 38: Trend Analysis*
Funding Allocation Index Score



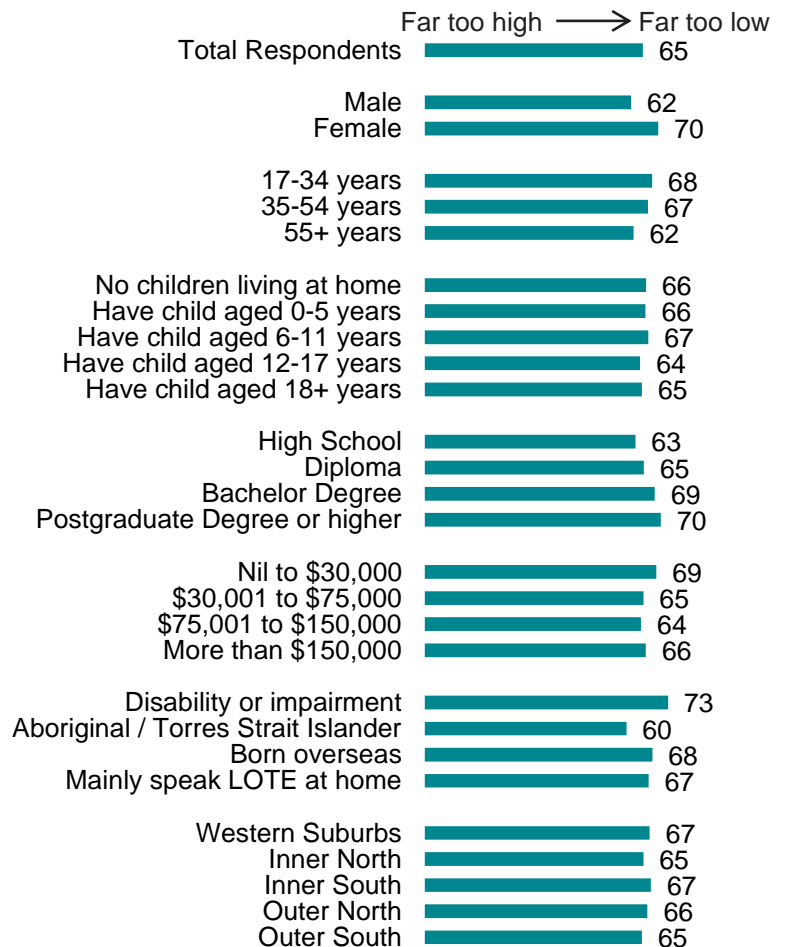
*Please note: 2015 and 2016 were based on a \$1 figure (calculated on "Arts" activities alone) compared with around \$2 per week spending for 2017 and 2018 and \$2.21 per week spending in 2019 and 2020 (calculated on "Arts and Cultural" activities).

16.3 Community Variances

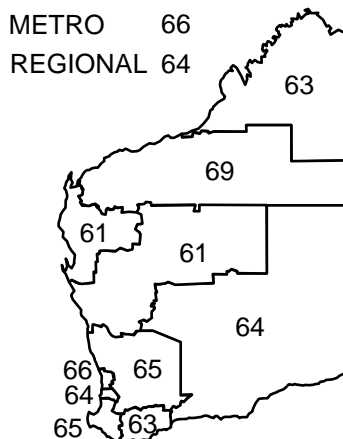
Respondents with a disability or impairment, those with higher levels of education, and those living in the western suburbs are more likely to feel that \$2.21 per person per week in arts allocation is too low (see Figure 39).

Across the regions, views were fairly consistent (see Map 13).

Figure 39: Community Variances
Funding Allocation Index Score



Map 13: Regional Variances
Funding Allocation Index Score



Q6a¹. About \$2.21 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 = 1158) NB: 16% of all respondents answered 'unsure'

1. Total Western Australian Government funding of \$114.91 per person per year towards Arts and Cultural activities as reported in the Meeting of Cultural Ministers Statistic Working Group, Cultural Funding by Government Survey 2017-18. Population data from ABS Cat. 3101.0 - Australian Demographic Statistics, Jun 2016: www.abs.gov.au/ausstats/abs@.nsf/mf/3101.0

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

76% of respondents would be willing to pay more to improve access to arts and culture in WA. Fairly consistent with past years' results, 31% of respondents would be willing to pay up to \$2 more, 39% would be willing to pay between \$2 and \$10 more, and 6% would be willing to pay over \$10 per week more (see Figure 40). Only 24% say they would not be willing to pay any more.

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

% of respondents		2015*	2016*	2017	2018	2019	2020	Trend
Not willing to pay any more	 24	25	29	28	27	23	24	=
Willing to pay \$0.01 to \$2 more per week	 31	44	46	32	33	32	31	=
Willing to pay \$2.01 to \$10 more per week	 39	29	24	36	37	40	39	=
Willing to pay over \$10 more per week	 6	2	1	4	3	4	6	=

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 = 1129) NB: 18% of all respondents answered 'unsure'

* Please note: 2015 and 2016 responses based on a \$1 per week public contribution.

Younger adults, those with higher levels of education, people with a disability and people who mainly speak a language other than English are more willing to pay an extra \$2 or more per week. The results also indicate that views are somewhat polarised among respondents of Aboriginal and Torres Strait Islander background. While a greater proportion are willing to pay over \$10 more per week, they are also most likely to say that they are not willing to pay anymore (see Table 5).

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
Total respondents	24	31	39	6
Male	26	31	37	6
Female	22	30	41	6
17-34 years	18	31	44	7
35-54 years	27	27	38	8
55+ years	26	33	36	4
No children living at home	23	30	40	6
Have child aged 0-5	13	37	42	8
Have child aged 6-11	21	31	38	10
Have child aged 12-17	33	25	36	6
Have child aged 18+	28	30	35	7
High School	29	31	35	5
Diploma	21	34	40	4
Bachelor Degree	19	28	44	8
Postgraduate Degree or higher	18	29	42	11
Nil to \$30,000	18	31	42	10
\$30,001 to \$75,000	27	31	37	4
\$75,001 to \$150,000	22	29	42	7
More than \$150,000	22	32	37	9
Disability or impairment	21	25	46	7
Aboriginal / Torres Strait Islander	34	22	29	15
Born overseas	19	30	43	7
Mainly speak LOTE at home	11	33	45	11
Metro	23	30	39	7
Regional	26	31	39	5
Western Suburbs	18	38	36	9
Inner North	17	33	41	9
Inner South	19	29	43	9
Outer North	25	29	41	4
Outer South	30	29	34	8
Gascoyne	35	36	29	0
Goldfields-Esperance	26	24	46	4
Great Southern	28	33	30	9
Kimberley	23	27	34	15
Mid West	26	31	41	2
Peel	22	28	49	2
Perth	23	30	39	7
Pilbara	11	41	39	9
South West	29	35	33	3
Wheatbelt	36	23	41	0

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 = 1129) NB: 18% of all respondents answered 'unsure'

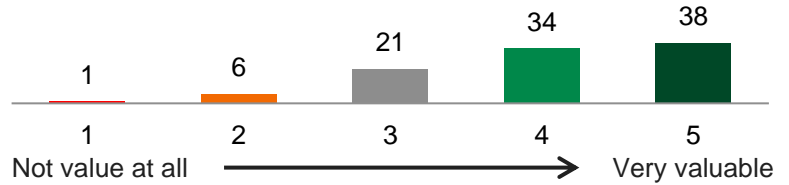
18 Value of WA film and television industry

18.1 Overall Ratings

When asked 'how valuable do you think the WA film and television industry is to the community', 72% rate value highly (see Figure 41).

The mean score is 4.0 out of 5.0 and the Index Score is 75 out of 100.

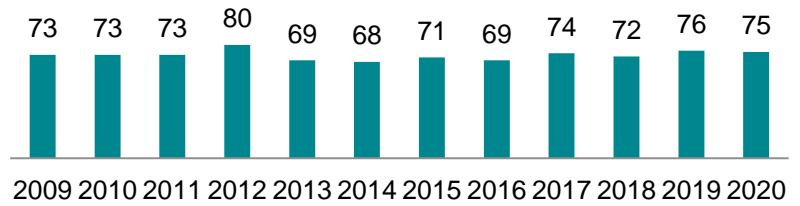
Figure 41: Overall Ratings
% of respondents



18.2 Trend Analysis

The Value Index Score has remained fairly steady at 75 this year. It has moved between 68 and 80 over the past 12 years (see Figure 42).

Figure 42: Trend Analysis
Value Index Score

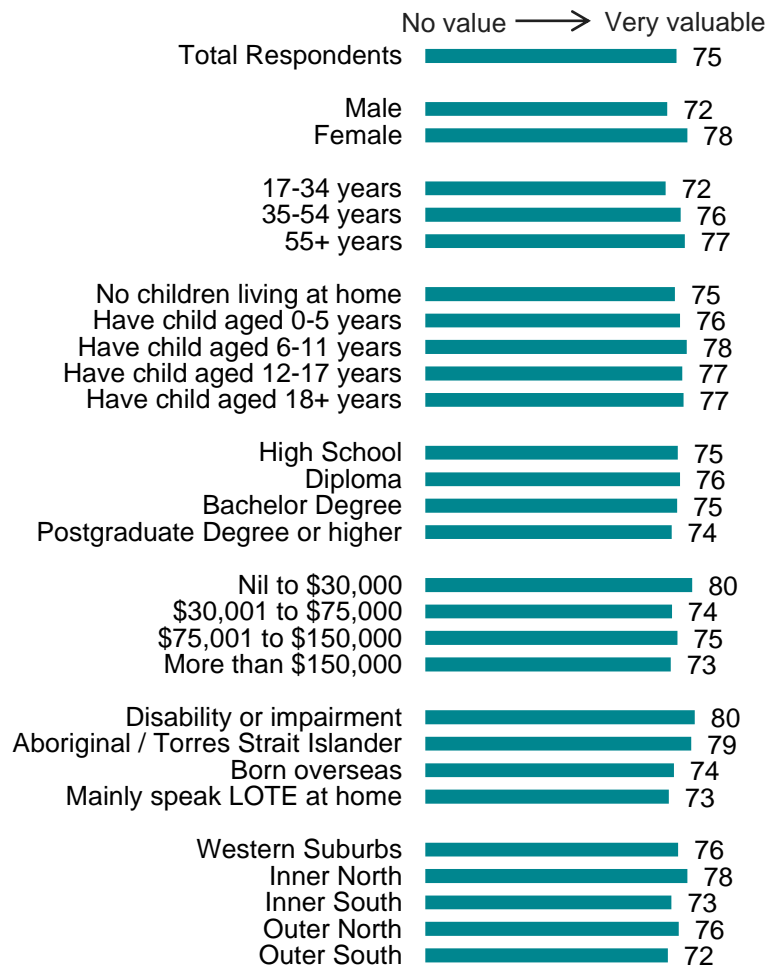


18.3 Community Variances

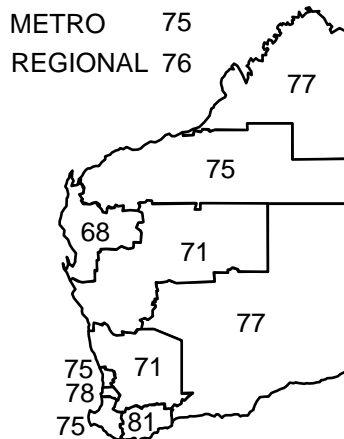
Perceived value is fairly consistent across the community. It is highest among low income earners, those with a disability or impairment and people of Aboriginal and Torres Strait Islander background (see Figure 43). It is also higher among females than males.

Across the regions, perceived value is highest in the Great Southern and lowest in the Gascoyne region (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 = 1325) NB: 4% of all respondents answered 'unsure'

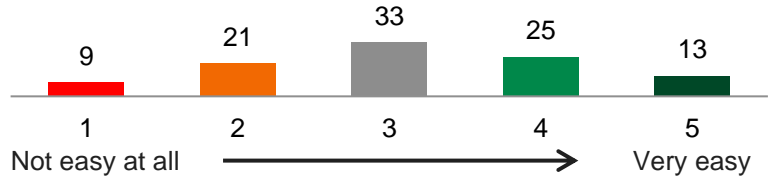
19 Accessibility of WA film and television productions

19.1 Overall Ratings

When asked “how easy is it for you to access Western Australian produced film and television productions?” 37% rated ease of access highly (see Figure 44).

The mean score is 3.1 out of 5.0 and the Index Score is 53 out of 100.

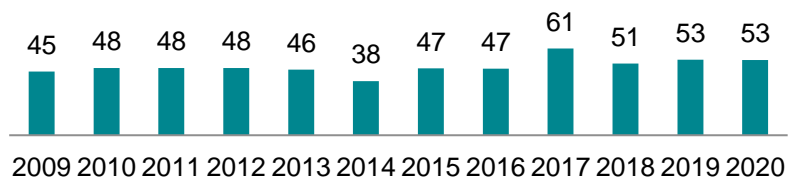
Figure 44: Overall Ratings
% of respondents



19.2 Trend Analysis

The Ease of Access Index Score is on par with last year, the second highest score over the past 12 years (see Figure 45). 2017 was the most successful year with a score of 61.

Figure 45: Trend Analysis
Ease of Access Index Score

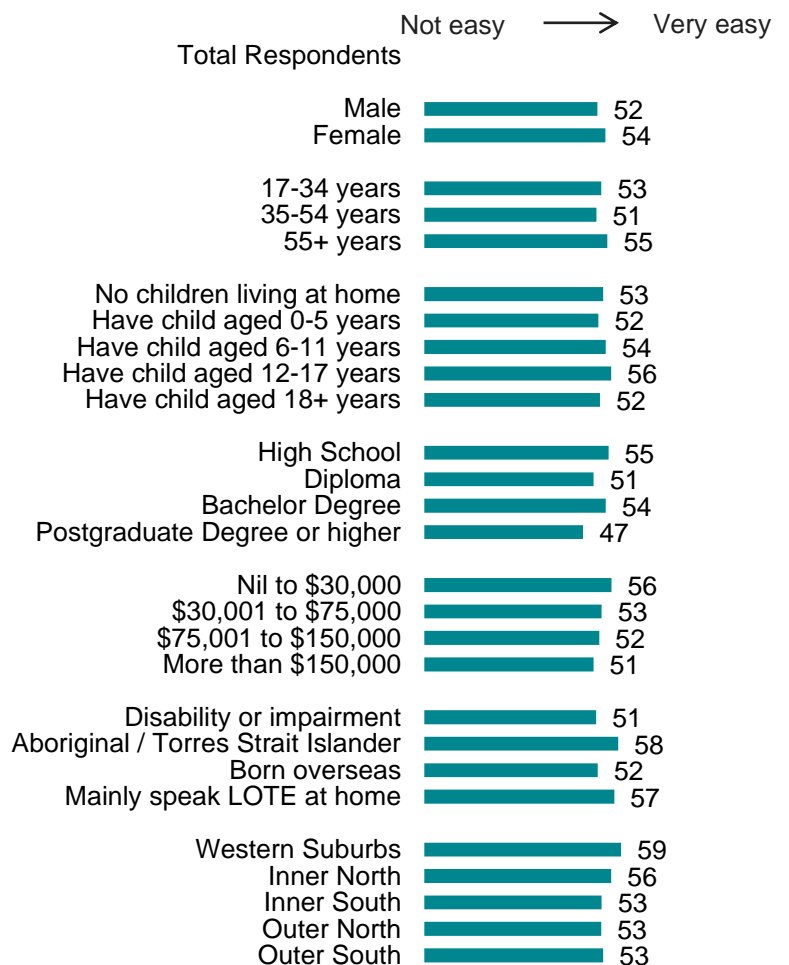


19.3 Community Variances

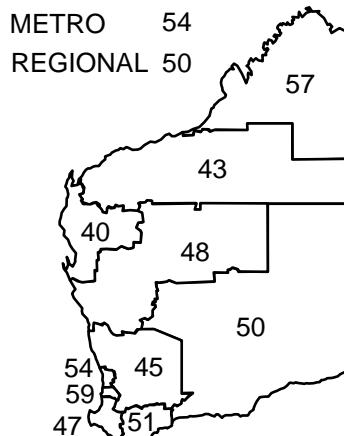
Ease of access is fairly consistent across the community. It is slightly higher in the Western Suburbs and among people with an Aboriginal and Torres Strait Islander background (see Figure 46).

Across the regions, ease of access is highest in Peel and the Kimberley (see Map 15). It is lowest in the Gascoyne.

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 = 1166) NB: 16% of all respondents answered 'unsure'

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?
- 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. How many times did you attend or participate in arts and cultural activities over summer?
- Q2c. When was the last time you attended or participated in an arts and cultural activity?
- Q3. What motivates you to participate in art and cultural activities? Please select your top 3 motivators from the following list.
- 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 \$2.21 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: Far too high; A bit too high; About right; A bit too low; Far too low; or, Unsure
- 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. Residential 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