



2022 Arts & Culture Monitor Survey

Prepared for:

Department of Local Government, Sport and Cultural Industries

Prepared by:

CATALYSE[®] Pty Ltd

16 May 2022

© Copyright CATALYSE[®] Pty Ltd 2022

CATALYSE 

1 Executive Summary

Art and culture continue 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

92% agree

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

Perceptions of individual and community value remains high.

When asked 'how valuable is the role of arts and culture in your life', the value index score is 66.

- The value index score has remained steady over the past four years.
- Perceived value continues to be highest in Perth's western suburbs and lowest in the Goldfields-Esperance region.
- Perceived value continues to be higher among those with a higher level of education and people who mainly speak a language other than English at home.
- Perceived value is lower among those with Aboriginal or Torres Strait Islander backgrounds and among those with lower levels of education.

Arts and culture is seen to have a valuable role in the community with a value index score of 77.

- The value index score has remained steady over the past four years.
- Community value continues to be highest among those with Aboriginal or Torres Strait Islander backgrounds and those who mainly speak a language other than English at home.
- By location, perceived value is highest in Perth's western suburbs and lowest in the Gascoyne region.

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

22% agree that "the arts only helps those people who participate, not the broader community".

- The agreement index score is 36, up 3 points from last year.
- People with higher levels of education, and females, are less likely to agree. They are more likely to think the arts does help the broader community.

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

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA', the value index score is 71, on par with recent years.

- The value index score continues to be higher among those who mainly speak a language other than English at home.
- By location, the value index score is highest in Perth's western suburbs and lowest in Mid West and Kimberley regions.

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 years.

- The value index score is highest among those with Aboriginal / Torres Strait Islander backgrounds and those who mainly speak a language other than English at home, and is higher among females than males.
- By location, the value index score is highest in Perth's western suburbs and lowest in Mid West region.

The arts continue to make people feel good.

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

- Level of agreement is highest among people who mainly speak a language other than English at home and those with a postgraduate degree or higher.
- By location, perceived value is highest in Perth's inner north and western suburbs, and the Peel region. It is lowest in the Great Southern region.

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

The ease of access index score is 67, on par with recent years.

- Ease of access is highest in Perth's western suburbs and lowest in the Pilbara region. There is a gap of 39 points between these two areas.

- Access is more difficult for people with disability, those with Aboriginal or Torres Strait Islander backgrounds, people with lower levels of income, and families with young children aged up to five years.

Annual participation in the arts continues to be impacted by COVID-19 restrictions.

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

- Annual participation has remained fairly steady over the past few years, but is down from a pre-COVID high of 82% in 2019.

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

- In the regions, frequent participation is highest in the South West and Great Southern.
- Frequent participation is lowest in the Gascoyne, Mid West, Kimberley and Goldfields-Esperance regions.

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

Motivators vary across different groups in the population.

- Older people and those with higher levels of education are more likely to be motivated by their interest in the content.
- While interest in content is also the greatest motivator for people with household income up to \$150,000, those earning more are mostly motivated by experiencing new things.
- People who mainly speak a language other than English at home, and people with an Aboriginal or Torres Strait Islander background, are also mostly motivated by experiencing new things.
- Families with children, and younger adults up to 34 years, mostly want to have fun.
- In the Gascoyne region, they are mostly motivated by opportunities to interact with family and friends.

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

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".

82% of respondents would be prepared to contribute more money to expand provision of and access to arts and culture. This is an increase from 76% in 2020.

- 58% of respondents believe a government allocation of \$2.73 per person per week for arts and culture is too low.
- 50% of respondents would be prepared to pay more than \$2 extra per person per week. A further 31% would be willing to pay up to \$2 more per week.

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

73% of respondents rate the industry highly.

- The value index score is 75, fairly consistent with recent years.
- Perceptions of value increases with age, and is highest among lower income earners.
- Across the regions, perceived value is highest in the Great Southern region and lowest in the Mid West.

Perceived ease of accessing WA film and TV remains moderate.

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

- The overall ease of access index score is 52 points; down from a high of 61 points in 2017.
- Respondents think it is easiest to access WA film and TV in the Goldfields-Esperance region and hardest in the Pilbara region. There is a gap of 22 points between these regions.

Many missed being able to participate in arts and cultural activities due to COVID-19 restrictions.

56% of respondents said they missed being able to attend or participate in arts and cultural activities to a large degree due to COVID-19 restrictions, giving a rating of 4 or 5 out of 5.

- Arts and cultural activities were missed to the greatest degree by people living in the western and inner northern suburbs of Perth, and those with Aboriginal or Torres Strait Islander backgrounds.
- By region, arts and cultural activities were missed to the greatest degree in the Peel region, and to the least degree in the Gascoyne region.

2 Strategic Insights

Five 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 continue to be highly valued and a growing majority believe an allocation of \$2.73 per person by the State Government is too low. Around 82% of respondents would now be willing to pay up to \$2 more per week to improve access to arts and culture in WA. This has grown steadily from 71% in 2016.

Strategic Insight 2

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

While overall levels of participation and attendance in arts and cultural activities have remained fairly steady at around 74% across WA over the past few years, this is down from a high of 82% in pre-COVID times. Attendance and participation is 10% points lower across regional WA than the Perth metropolitan area, falling as low as 34% in the Gascoyne region, 58% in the Mid West, and 59% in both the Goldfields-Esperance and Kimberley regions.

While attendance and participation is slightly higher in the Pilbara region at 67%, respondents in this region report the lowest ease of access at 39 index points out of 100. Ease of access scores are also lower in the Kimberley, Gascoyne, Mid West and Goldfields-Esperance, ranging between 40 and 48 points. This compares to 71 points across the Perth metropolitan area.

Strategic Insight 3

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

92% of respondents agree that it is important for children to have access to learn music, arts and crafts, writing, drama, media training etc. as part of their education. However, the ease of accessing art and cultural activities is considered to be moderate among families with pre-school aged children (61 index points out of 100), primary school aged children (67) and high school aged children (65).

Over summer, families with primary school aged children found it easier to engage in arts and cultural activities than those with younger or older children. While 82% of families with primary school aged children attended or participated in at least one art and cultural activity over summer, this dropped to 76% among those with pre-school aged children, and to 67% among those with high school aged children. Consider further research among young people aged 12 to 17, and families with children aged five years and under, to understand barriers for engaging in arts and cultural activities.

Strategic Insight 4

Develop strategies to increase access and inclusion in arts and culture activities for low income earners.

Consider ways to engage low income earners in arts and cultural activities to increase their sense of belonging. Low income earners believe arts and cultural activities play a valuable role in creating a sense of community and a sense of identity. Only 56% of low income earners attended or participated in arts and cultural activities over summer compared to 71% of all respondents.

Strategic Insight 5

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

The perceived value of the WA film and television industry continues to be high at 75 index points out of 100, and remains higher among low income earners (83 points) and those aged 55 years or older (79 points). However, while value is high, ease of access has remained moderate across WA over recent years. It is at 52 index points out of 100 this year, significantly below the highest score of 61 points in 2017.

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 2022 Monitor was managed by the Department of Local Government, Sports and Cultural Industries (DLGSC) Culture and the Arts division. The study assists DLGSC with KPI performance evaluation, measurement of public value and strategic planning.

Once again, the study was conducted using an online survey. 22,991 online panellists were randomly selected and invited to complete an online survey between 3 and 26 April 2022. 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.

1,354 respondents completed a survey. The overall sampling error was reduced to $\pm 2.7\%$ at the 95% confidence interval. In effect, if the survey result is 50%, we would expect the population result to be between 47.3% and 52.7%. 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	3 – 26 April 2022					
Sample source	Thinkfield Online Panel					
Total invited	22,991					
Open Rate (# opened)	20%					
Sample Size - # completed	1,354					
Response rate*	29%					
Sampling error	$\pm 2.7\%$ 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	0.862	0.460	0.090	0.417	0.152	0.073
Goldfields-Esperance	-	5.346	1.179	0.404	0.311	0.731
Great Southern	5.379	1.436	0.634	0.473	0.299	0.305
Kimberley	1.562	1.112	1.472	0.336	0.413	0.532
Mid West	2.455	1.748	0.463	0.216	0.325	0.627
Peel	3.949	2.531	1.015	0.521	0.696	0.712
Pilbara	2.707	1.156	1.275	0.403	0.477	1.844
South West	1.423	2.786	0.776	0.421	0.460	0.444
Wheatbelt	2.231	1.021	0.573	3.239	0.590	0.570
Perth	1.082	1.414	1.061	1.741	1.207	1.050

*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

41% of respondents were male, 58% were female and less than 1% answered non-binary or that they prefer to use a different term.

Age

29% of respondents were aged 17-34 years, 34% were aged 35-54 years and 37% were over 55 years.

Life stage

63% of respondents did not have children living at home. This includes single person households, group households, couples without children and empty nesters. 37% of respondents had at least one child living at home.

Highest level of education attained

26% of respondents had a high school leaving certificate as their highest level of education, 26% had a diploma or advanced diploma, 24% had a Bachelor Degree or higher and 10% answered 'other'.

Household income

43% of respondents had a combined household income before tax of up to \$75,000 and 45% were earning over \$75,000. 13% of respondents refused to provide this information.

Disability

13% of respondents live in a household where they or someone they live with is affected by disability.

Ethnic diversity

26% of respondents live in a household where they or someone they live with was born overseas, 3% 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

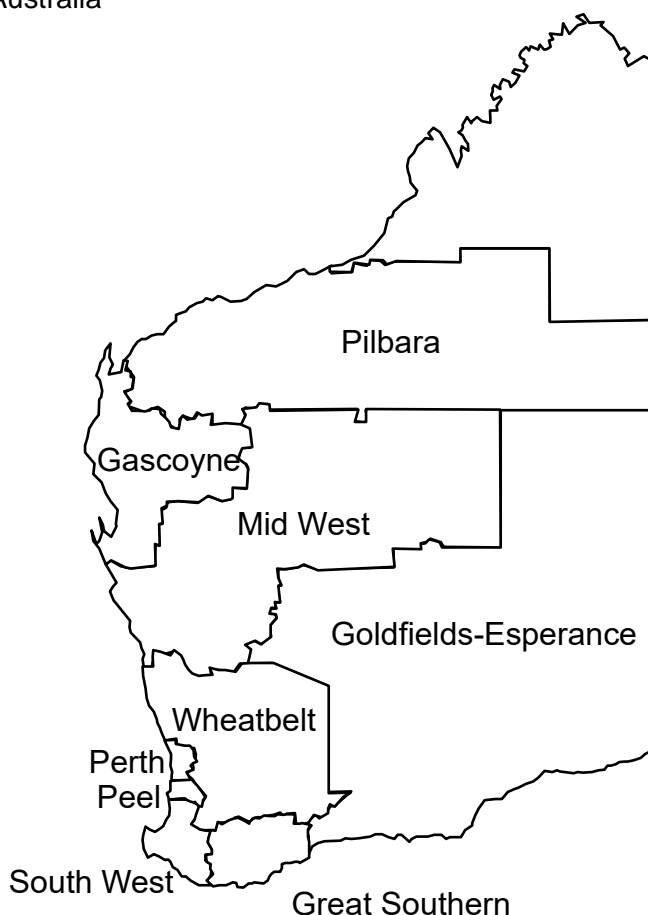
61% of respondents live in the Greater Perth Metropolitan area and 39% live in regional WA.

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; 6161-6206
Regional WA:	6041-6044; 6207-6999

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

Map 1: Regions of Western Australia



3.3 Analysis

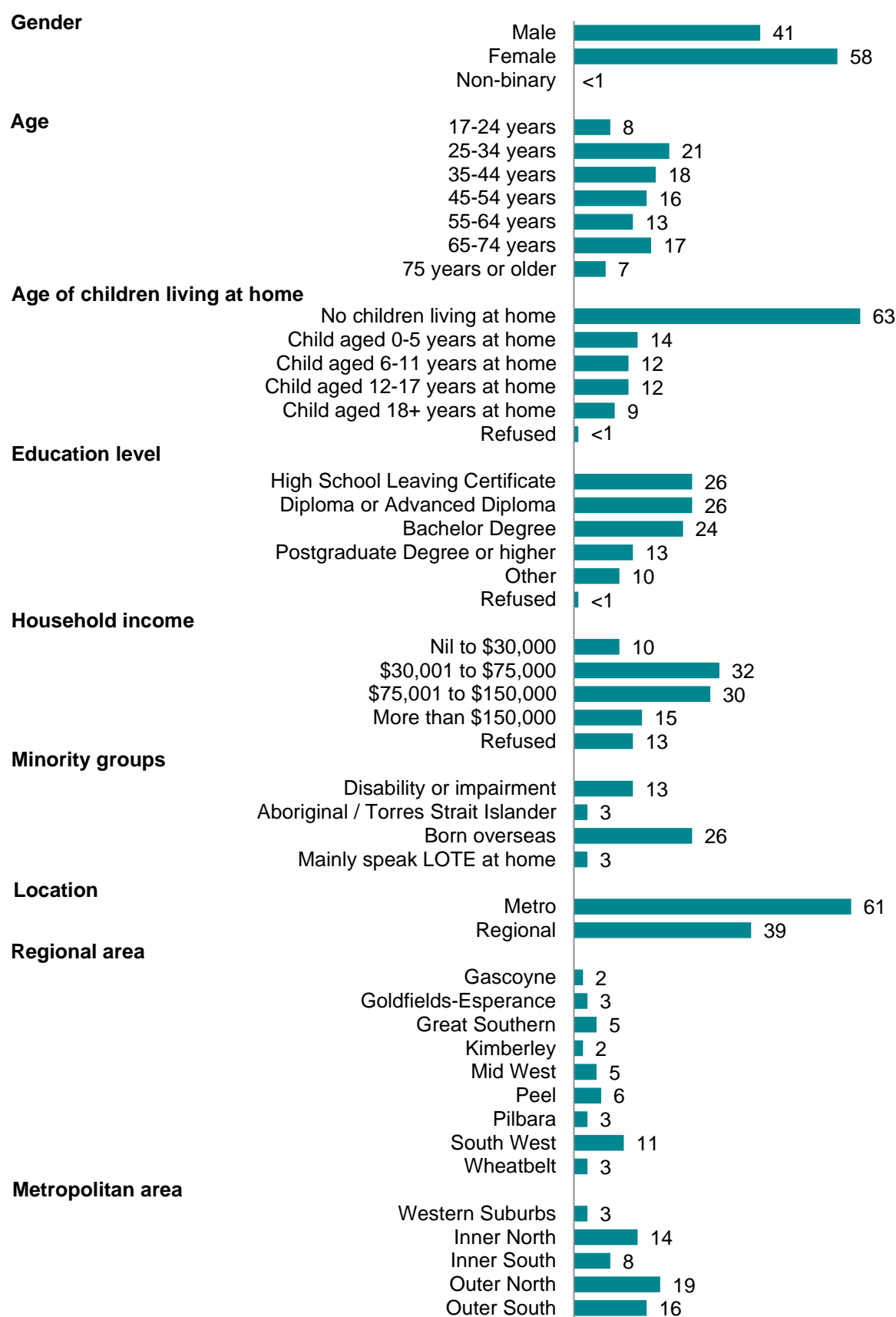
Throughout the report, index scores have been used to show historical analysis and to compare demographic variances across the community. Index scores are used when respondents have been asked to provide an answer on a five point scale such as level of agreement, ease of access and perceived value. The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

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

Table 2: Index Score Calculation

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

Figure 1: Sample Profile
% respondents, unweighted



SURVEY FINDINGS

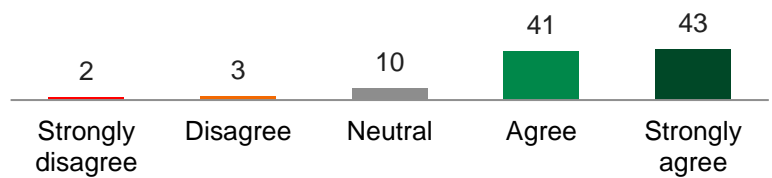
4 The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public

4.1 Level of Agreement

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 and the Agreement Index Score is 80 out of 100

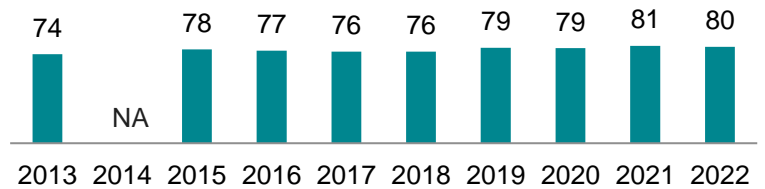
Figure 2: Overall Ratings
% of respondents



4.2 Trend Analysis

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

Figure 3: Trend Analysis
Agreement Index Score

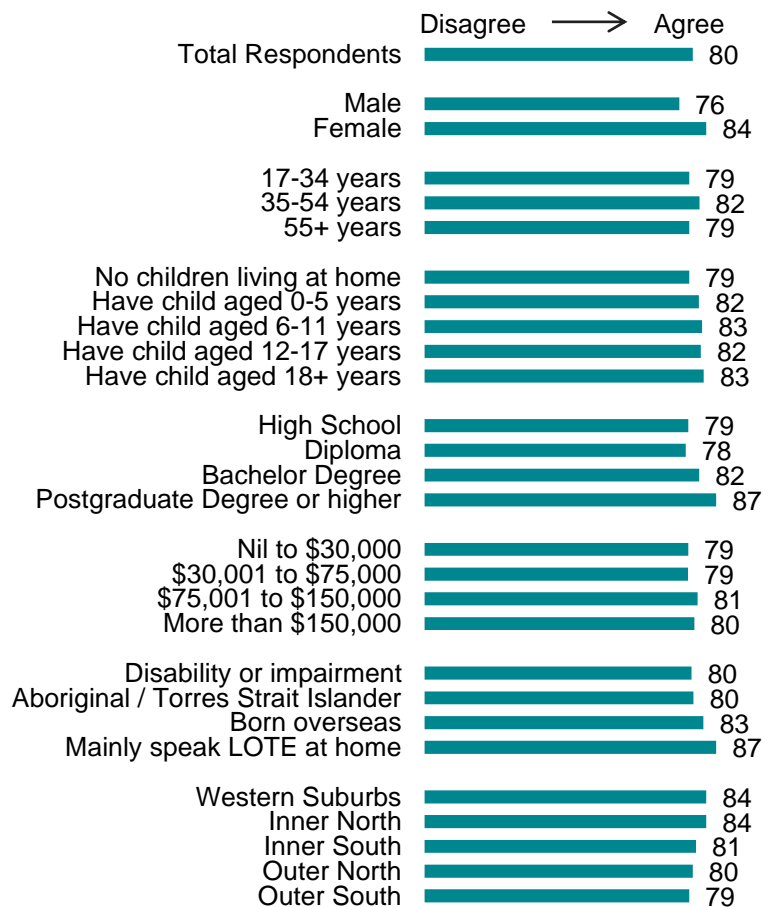


4.3 Community Variances

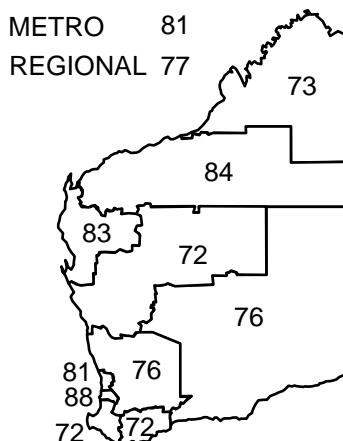
The Agreement Index Score is consistently high across the community with the highest scores among people with a higher level of education and those who mainly speak a language other than English at home.

Across the regions, those in the Perth, Pilbara and Gascoyne region 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 = 1335) NB: 1% of all respondents answered 'unsure'

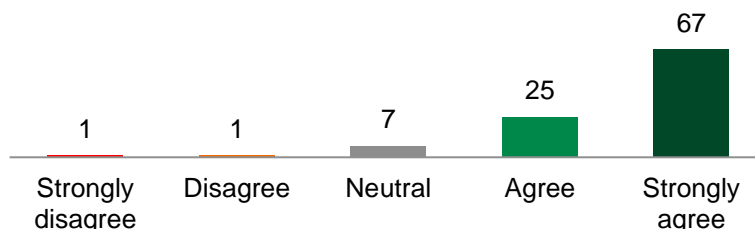
5 It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education

5.1 Level of Agreement

92% of respondents agree or strongly agree with the statement “it is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education” (see Figure 5).

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

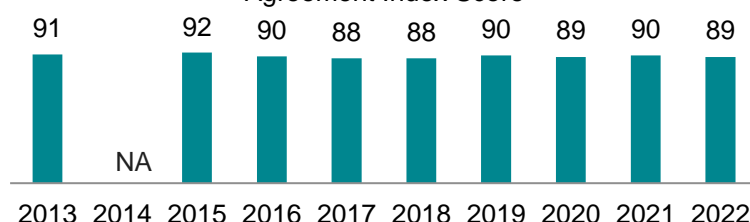
Figure 5: Overall Ratings
% of respondents



5.2 Trend Analysis

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

Figure 6: Trend Analysis
Agreement Index Score

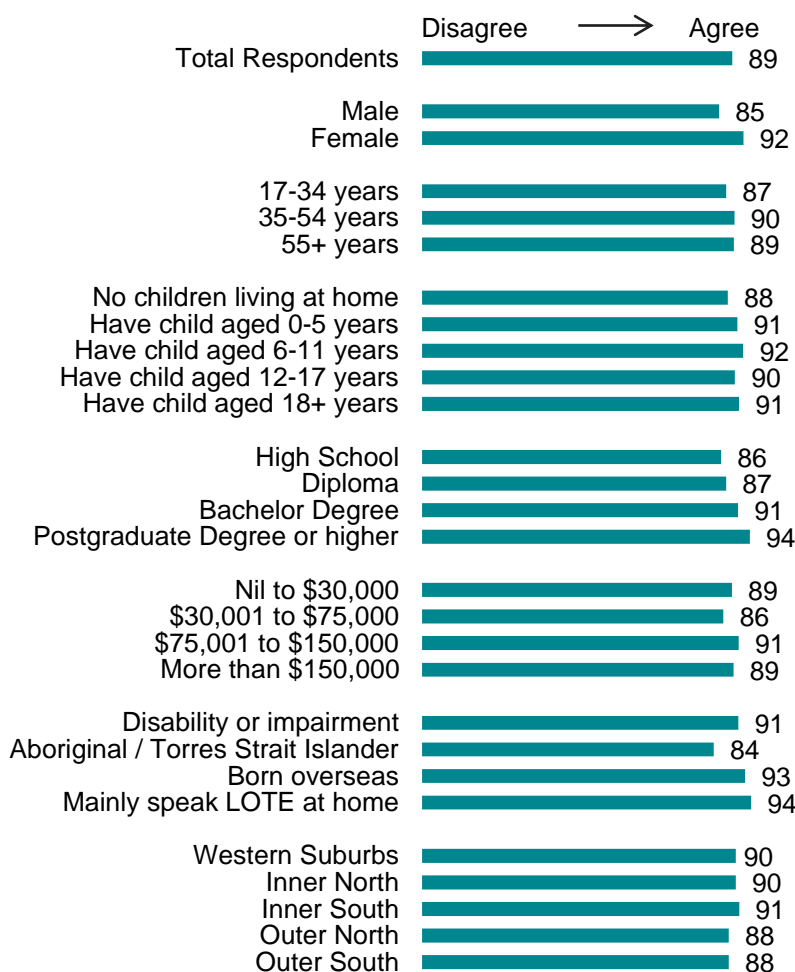


5.3 Community Variances

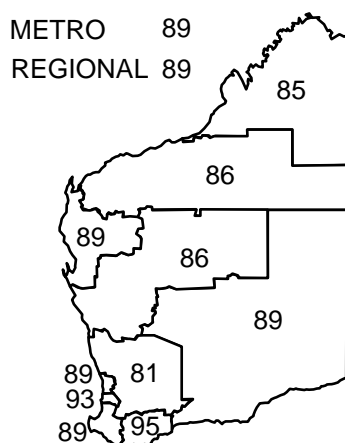
The Agreement Index Score is consistently high across the community (see Figure 7) and across regional areas (see Map 3). Females, those with higher levels of education, and those born overseas or who mainly speak a language other than English at home were more likely to agree.

Across the regions, those in the Great Southern and Peel region are most likely to agree that children should have access to arts as part of their education.

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 = 1341) NB: 1% of all respondents answered 'unsure'

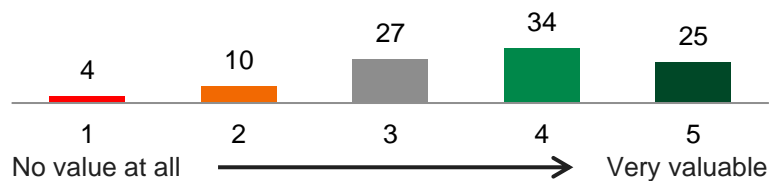
6 Perceived value of arts and culture for individuals

6.1 Overall Ratings

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

The mean score is 3.6 out of 5 and the Index Score is 66 out of 100.

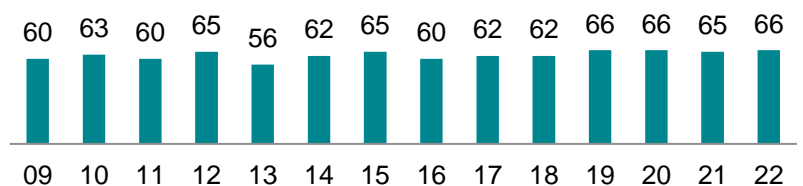
Figure 8: Overall Ratings
% of respondents



6.2 Trend Analysis

The Value Index Score has been steady over recent years (see Figure 9).

Figure 9: Trend Analysis
Value Index Score

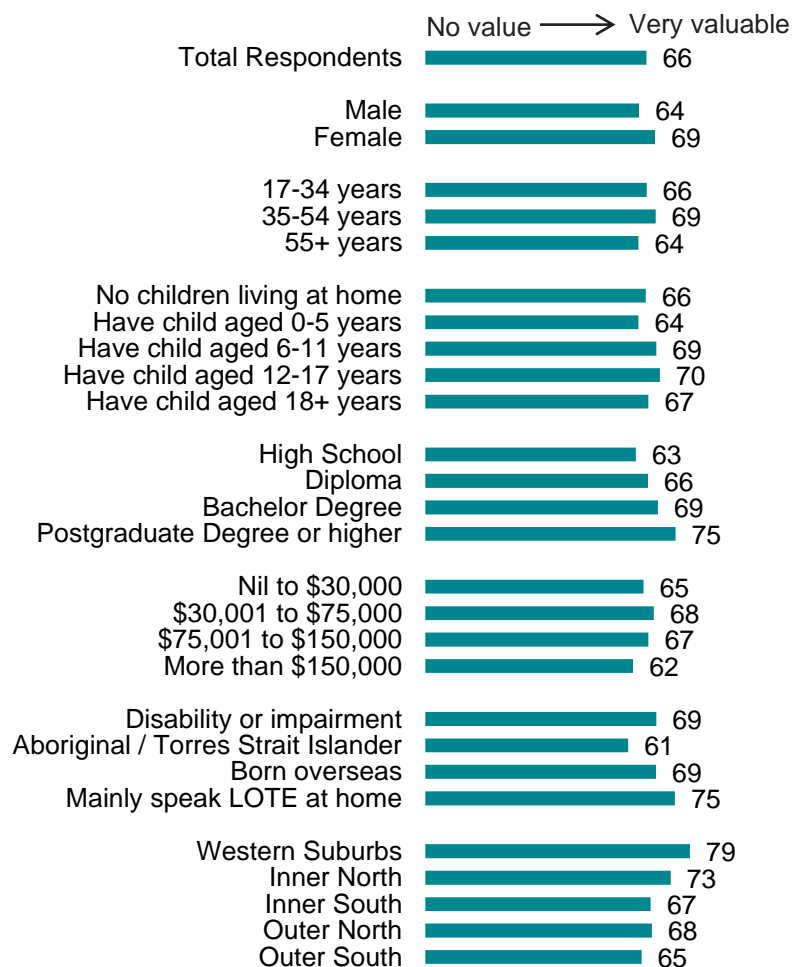


6.3 Community Variances

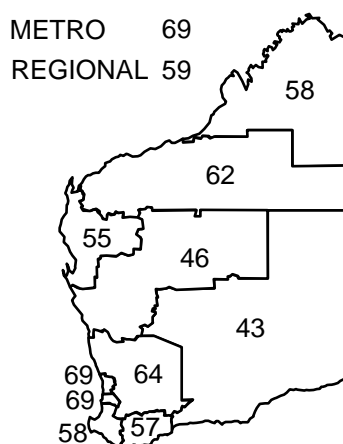
Perceived value is higher in the western suburbs and among those with a higher level of education people and those who mainly speak a language other than English at home. Perceived value is lowest among those with Aboriginal / Torres Strait Islander background and among those with lower levels of education (see Figure 10).

Across the regions, perceived value is lower in the Goldfields Esperance and Mid West regions (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 = 1335) NB: 1% 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?' 77% 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.

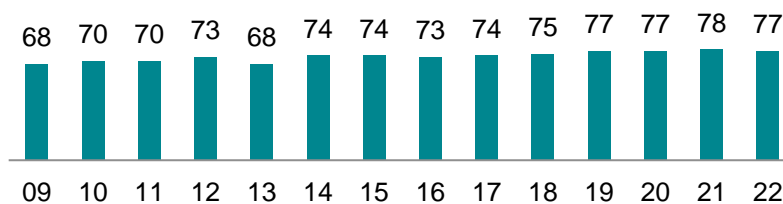
Figure 11: Overall Ratings
% of respondents



7.2 Trend Analysis

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

Figure 12: Trend Analysis
Value Index Score

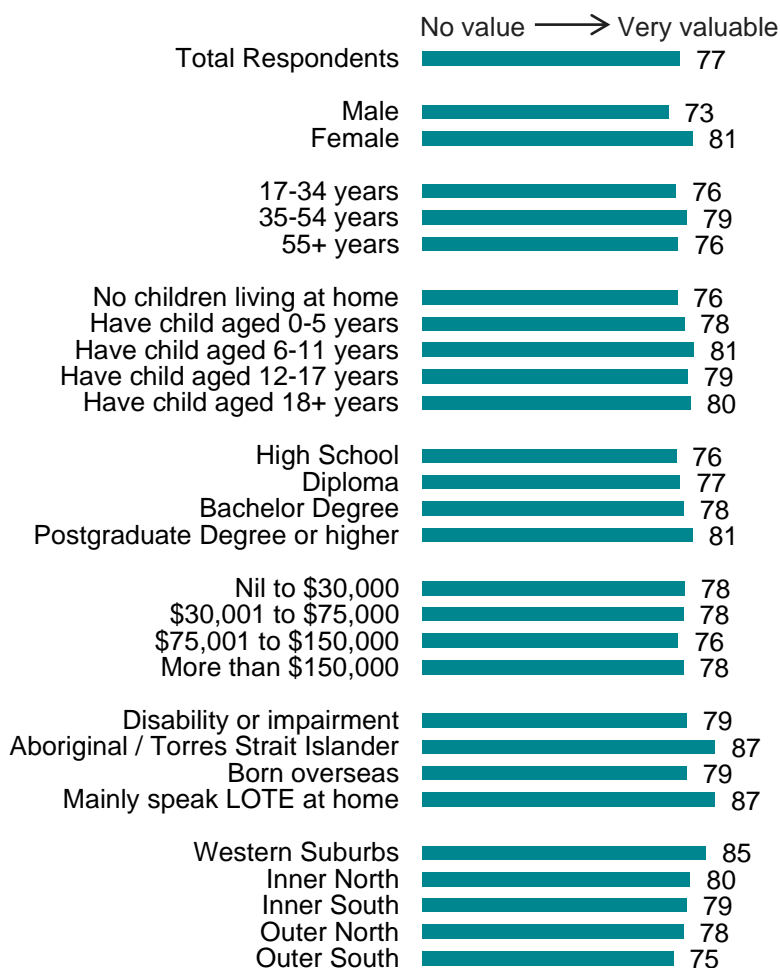


7.3 Community Variances

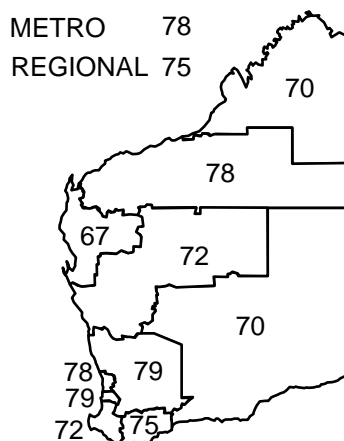
Community value is higher among those with Aboriginal / Torres Strait Islander backgrounds, those who mainly speak a language other than English at home and in the Western Suburbs. Perceived value is lower among males (see Figure 13).

Across the regions, perceived value is highest in the Peel, Wheatbelt, Perth and Pilbara regions. There is greatest room to improve perceived value in the Gascoyne region (see Map 5).

Figure 13: Community Variances
Value Index Score



Map 5: Regional Variances
Value Index Score



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

Base: All respondents, excludes unsure (n = 1329) NB: 2% of all respondents answered 'unsure'

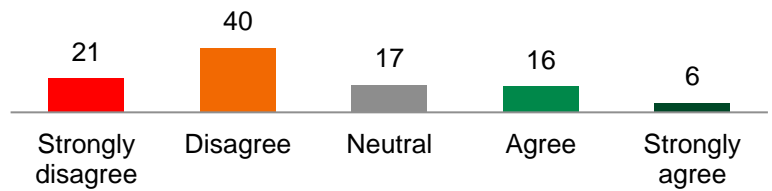
8 The arts only helps people who participate, not the broader community

8.1 Level of Agreement

22% of respondents agree “the arts only helps those people who participate, not the broader community”. 62% disagree with the statement. These people think the arts does help the broader community (see Figure 14).

The mean score is 2.4 out of 5.0 and the Index Score is 36 out of 100.

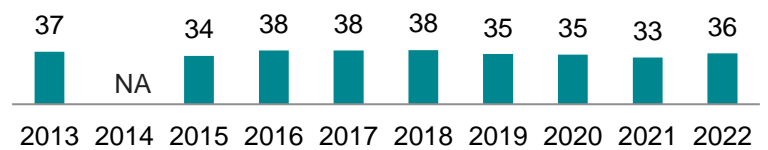
Figure 14: Overall Ratings
% of respondents



8.2 Trend Analysis

The Agreement Index Score has risen by 3 index points over the last year. At 36 points this year, it is moving back towards a high of 38 points recorded in 2016, 2017 and 2018 (see Figure 15).

Figure 15: Trend Analysis
Agreement Index Score

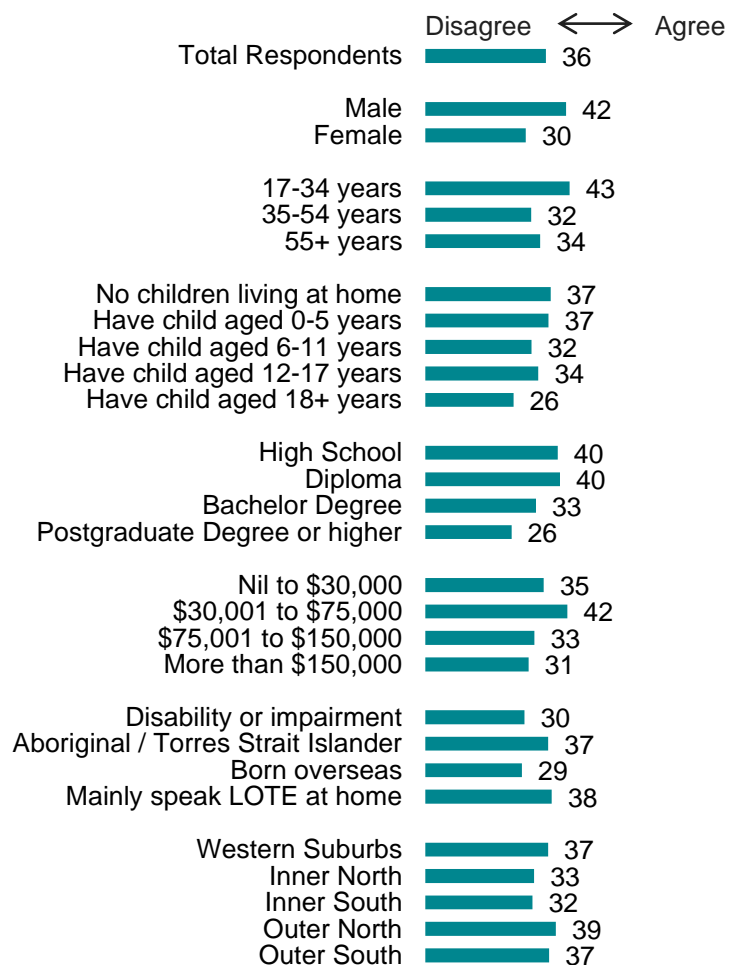


8.3 Community Variances

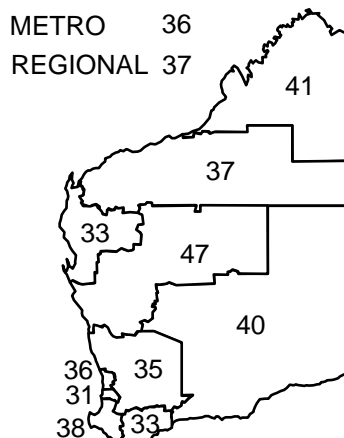
Level of agreement varies across the community. Females and people with higher levels of education are less likely to agree (see Figure 16); they are more likely to think the arts does help the broader community.

Across the regions, respondents in the Peel region, Gascoyne and Great Southern are the least likely to agree (see Map 6).

Figure 16: Community Variances
Agreement Index Score



Map 6: Regional Variances
Agreement Index Score



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

Base: All respondents, excludes unsure (n = 1318) NB: 3% of all respondents answered 'unsure'

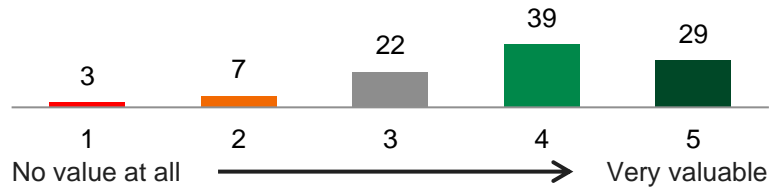
9 Value of arts and culture's contribution to creating a sense of community

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 3.8 out of 5.0 and the Index Score is 71 out of 100.

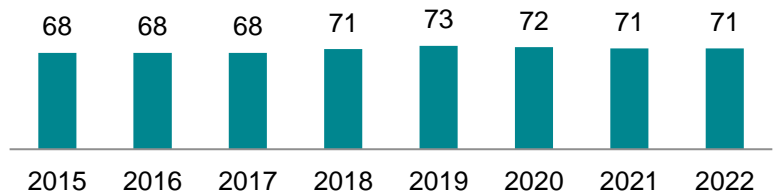
Figure 17: Overall Ratings
% of respondents



9.2 Trend Analysis

The Value Index Score has remained fairly steady over recent years (see Figure 18).

Figure 18: Trend Analysis
Value Index Score

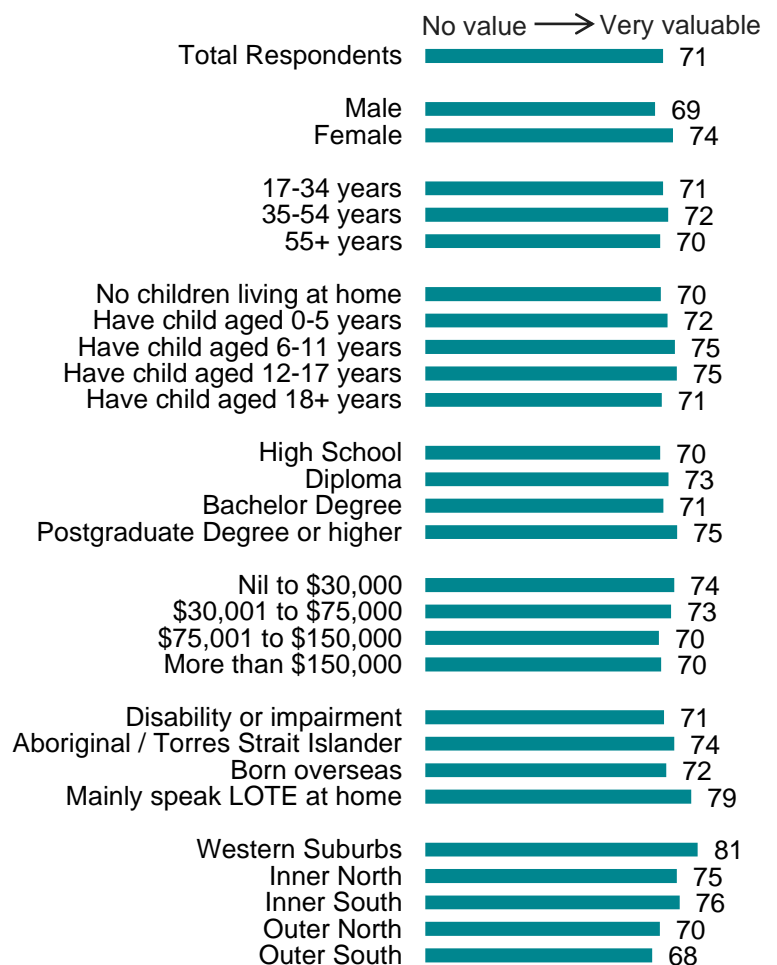


9.3 Community Variances

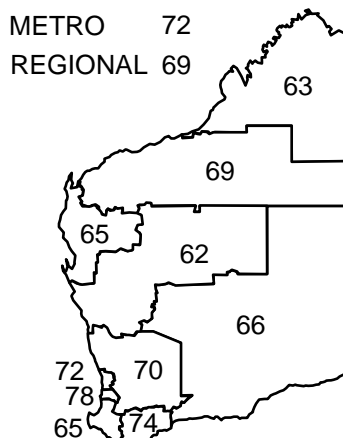
Perceived value is fairly consistent across the community. It is slightly higher in the Western suburbs and among those who mainly speak a language other than English at home (see Figure 19).

Across the regions, perceived value is highest in the Peel and Great Southern regions (see map 7). It is lowest in the Mid West and Kimberley regions.

Figure 19: Community Variances
Value Index Score



Map 7: Regional Variances
Value Index Score



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

Base: All respondents, excludes unsure (n = 1306) NB: 4% of all respondents answered 'unsure'

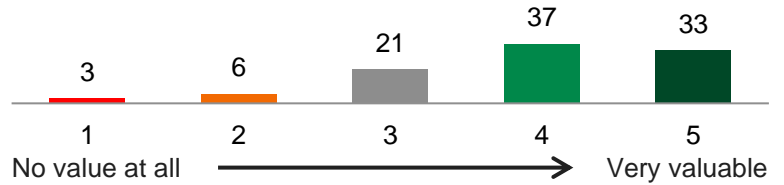
10 Value of arts and culture's contribution to creating a sense of identity

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.

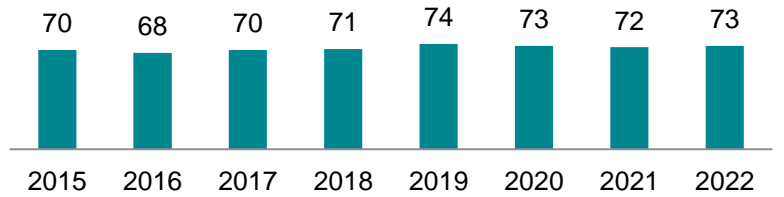
Figure 20: Overall Ratings
% of respondents



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

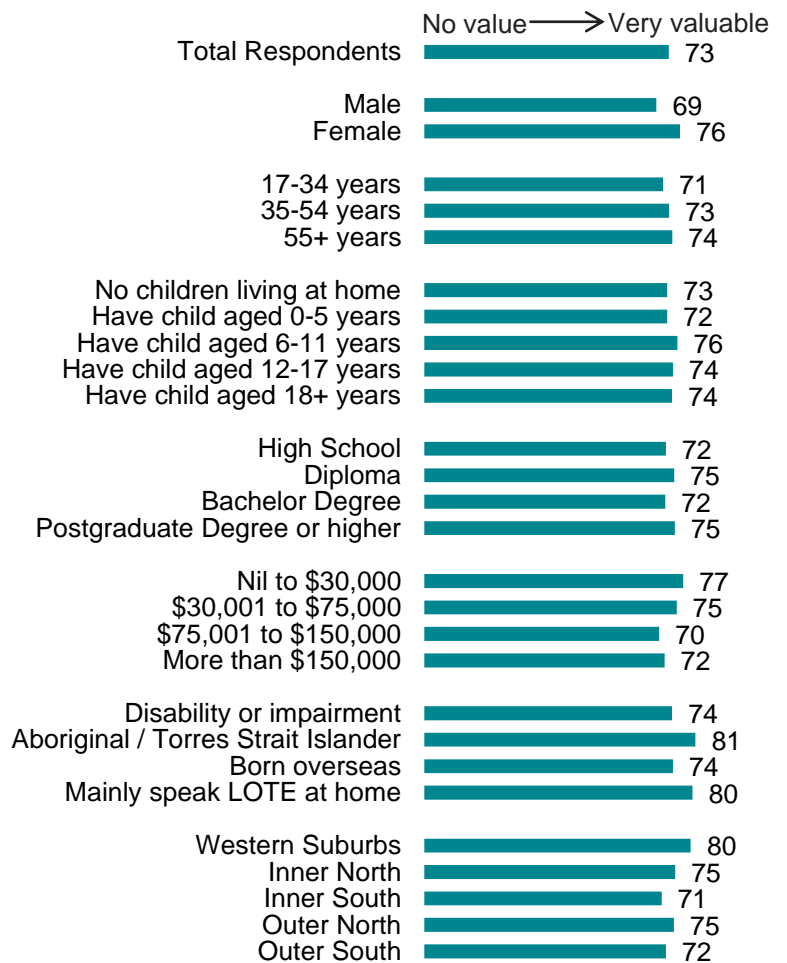


10.3 Community Variances

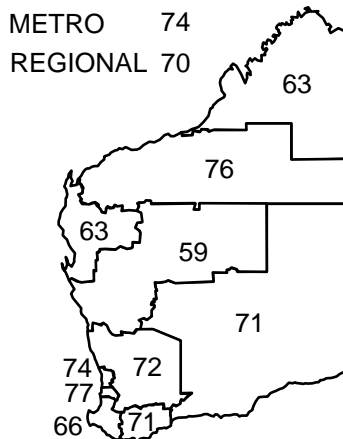
Perceived value is fairly stable across the community. Perceived value is slightly higher among females, in the Western suburbs, among lower income earners and those with an Aboriginal or Torres Strait Islander background (see Figure 22).

Across the regions, perceived value is highest in the Peel and Pilbara regions (see Map 8). It is lowest in the Mid West, Kimberly and Gascoyne regions.

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 = 1300) NB: 4% of all respondents answered 'unsure'

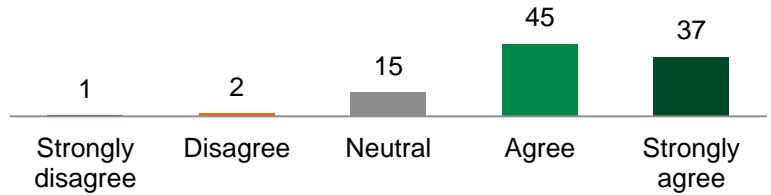
11 The arts make me feel good

11.1 Level of Agreement

82% 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 78 out of 100.

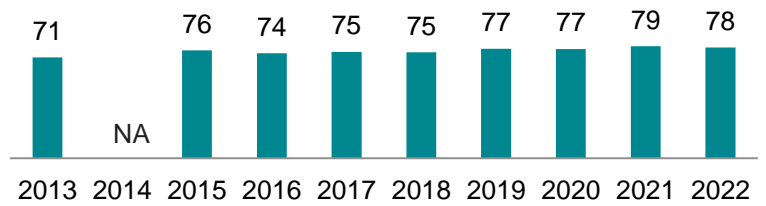
Figure 23: Overall Ratings
% of respondents



11.2 Trend Analysis

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

Figure 24: Trend Analysis
Agreement Index Score

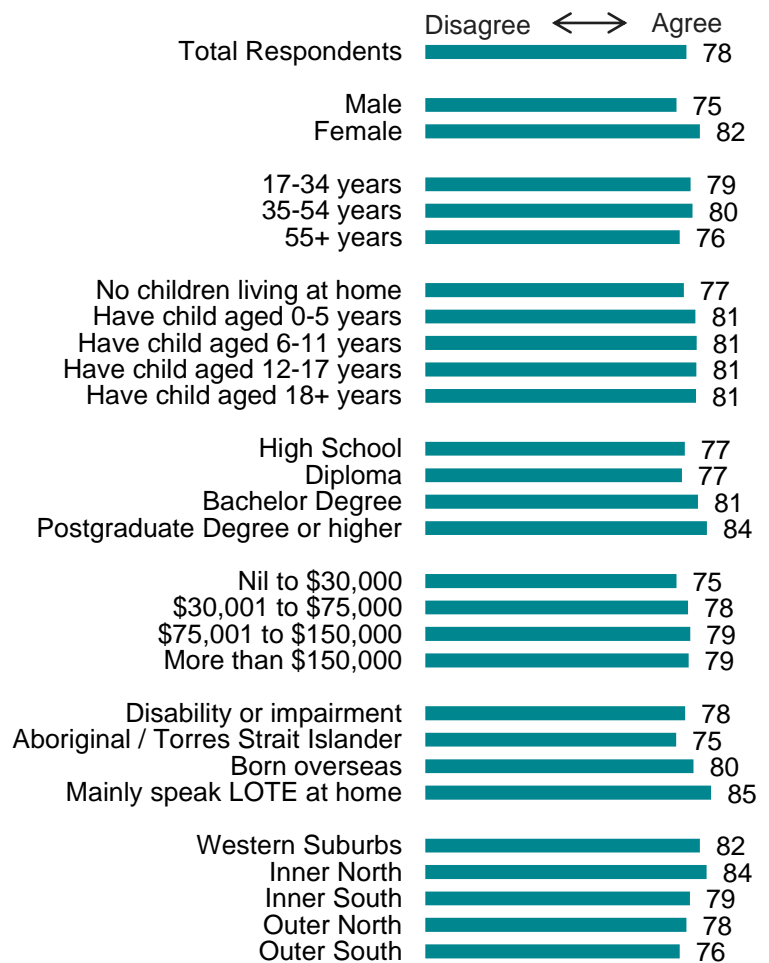


11.3 Community Variances

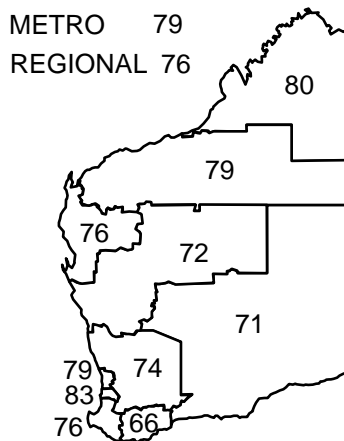
Level of agreement varies across the community. Agreement is higher among females, those with higher levels of education, people living in the Western and Inner North suburbs, and those who mainly speak a language other than English at home (see Figure 25).

Across the regions, agreement is highest in the Peel and Kimberly regions and is lowest in the Great Southern 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 = 1342) NB: 1% of all respondents answered 'unsure'

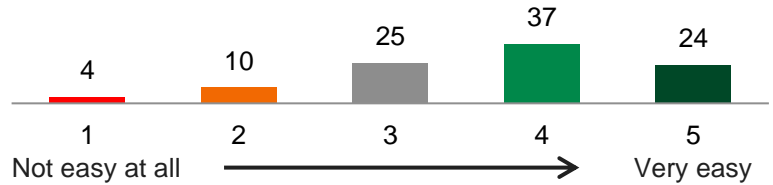
12 Ease of accessing or participating in arts and cultural activities in WA

12.1 Overall Ratings

61% of respondents believe it is easy to access or participate in arts and cultural activities in WA, giving a rating of 4 or 5 out of 5 (see Figure 26).

The mean score is 3.7 out of 5.0 and the Index Score is 67 out of 100.

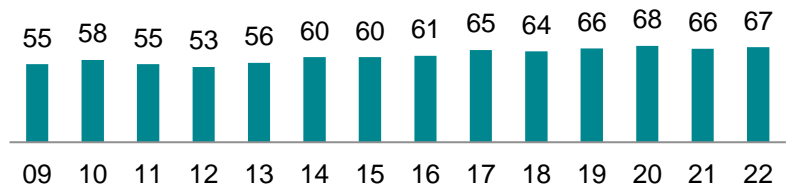
Figure 26: Overall Ratings
% of respondents



12.2 Trend Analysis

After increasing to a high of 68 in 2020, the Ease of Access Index Score has remained fairly steady (see Figure 27).

Figure 27: Trend Analysis
Ease of Access Index Score

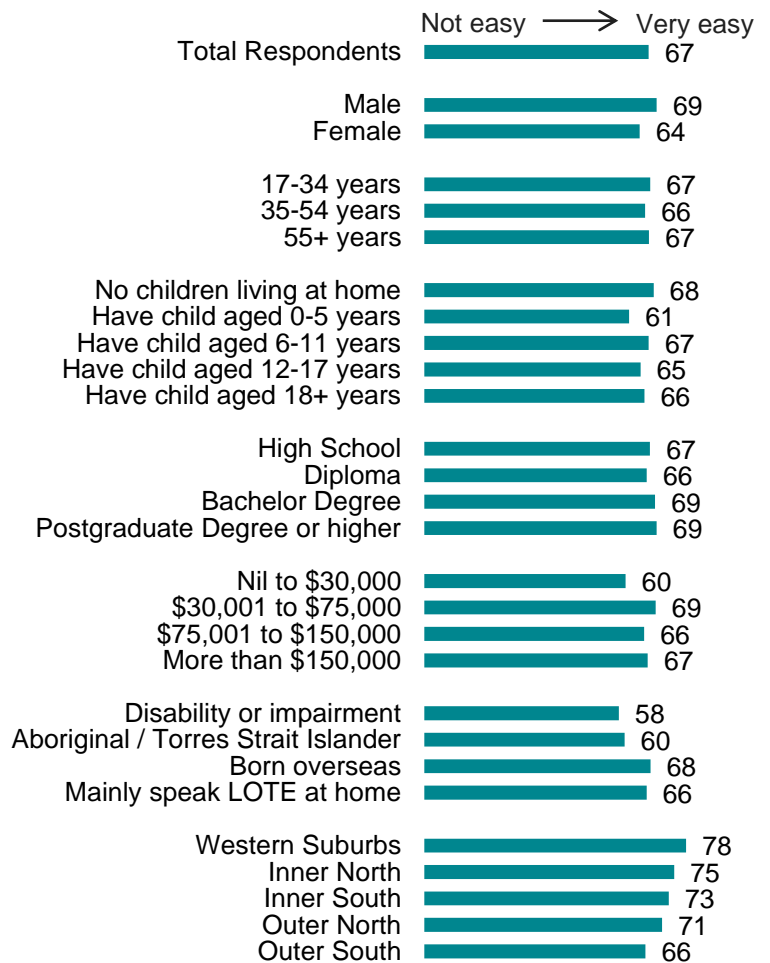


12.3 Community Variances

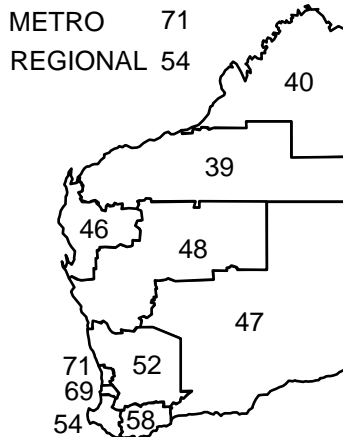
It is easier to access and participate in art and cultural activities in inner Perth suburbs, than outer metropolitan and regional areas. It is particularly difficult to access art and culture in the Pilbara and Kimberley regions (see Map 10).

It is also more difficult to access and participate in art and cultural activities for people with disability, Aboriginal / Torres Strait Islander background, and lower income (see Figure 28).

Figure 28: Community Variances
Ease of Access Index Score



Map 10: Regional Variances
Ease of Access Index Score



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

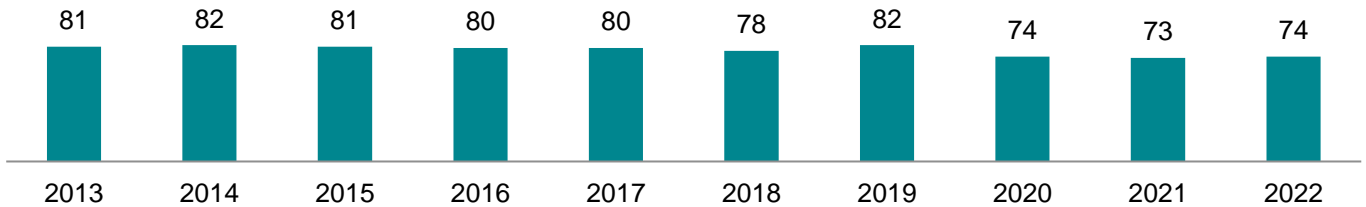
Base: All respondents, excludes unsure (n= 1277) NB: 6% of all respondents answered 'unsure'

13 Attendance and participation in arts and cultural activities in WA

13.1 Attendance and participation over the past 12 months

Survey participants were informed that arts and cultural activities includes a range of activities such as cinema, music, theatre, dance, visual arts, opera, festivals, libraries, galleries, museums, archives and community cultural events. In 2022, 74% of respondents said they attended or participated in an arts or cultural activity in the past twelve months (see Figure 29). Attendance has remained fairly steady over the past three years, but slightly lower than earlier years, most likely impacted by COVID-19 restrictions.

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=1312) NB: 3% of all respondents answered 'unsure'

Please note variations in the questions from 2013 to 2019:

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

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

2013-2018 Q2. How many times have you attended or participated in an arts and cultural activity over the past 3 months?

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

13.2 Community variances in attendance over the past 12 months

Attendance and participation are higher among people with higher levels of education, in inner Perth suburbs and among families with primary school aged children. Attendance is lower among older people and lower income earners (see Figure 30).

Across the regions, attendance is much higher in the Great Southern and much lower in Gascoyne region (see Map 11).

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

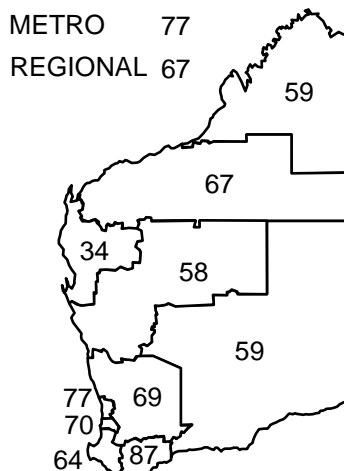
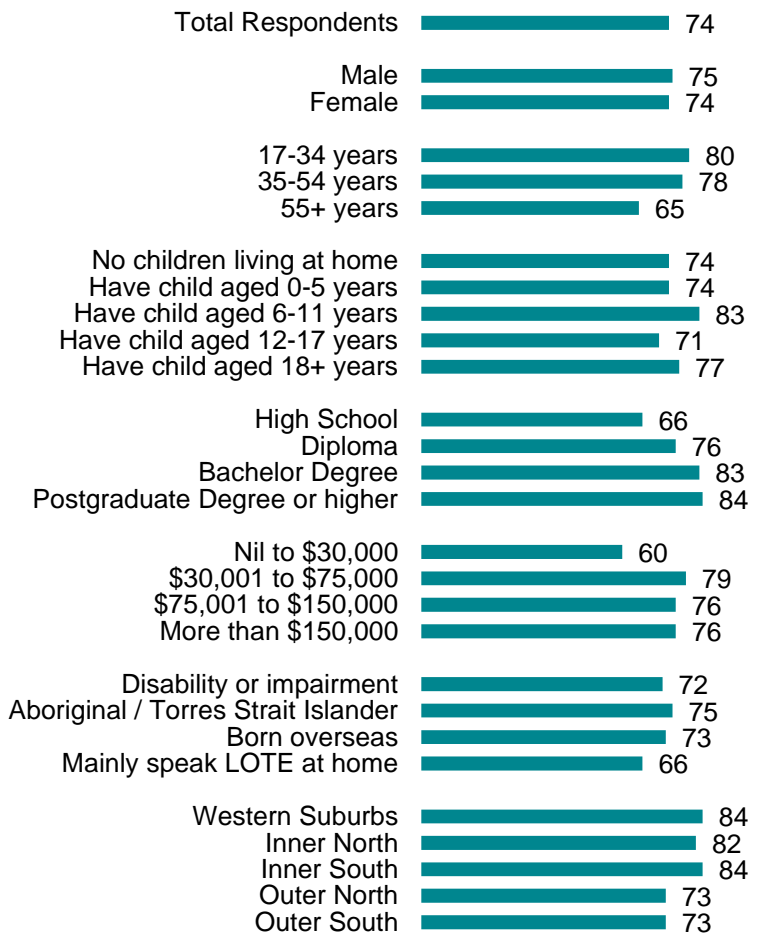


Figure 30: **Community Variances**

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

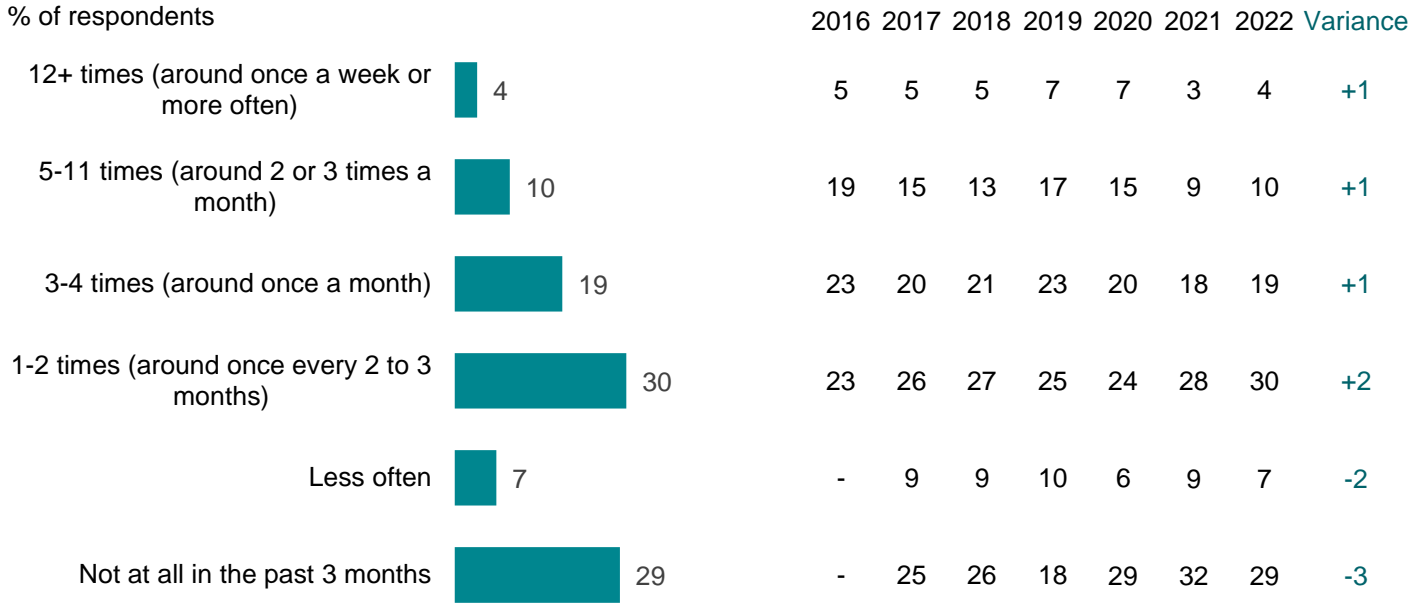


13.3 Frequency of attendance and participation in arts and culture over summer

Participation in arts and culture over summer increased to 71%, up from 68% last year and consistent with pre-COVID attendance figures.

Over summer, 4% of respondents attended or participated in art and culture at least once a week, 10% had attended two or three times per month, 19% had attended once a month, 30% had attended one or two times over summer, and 7% 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 = 1297)

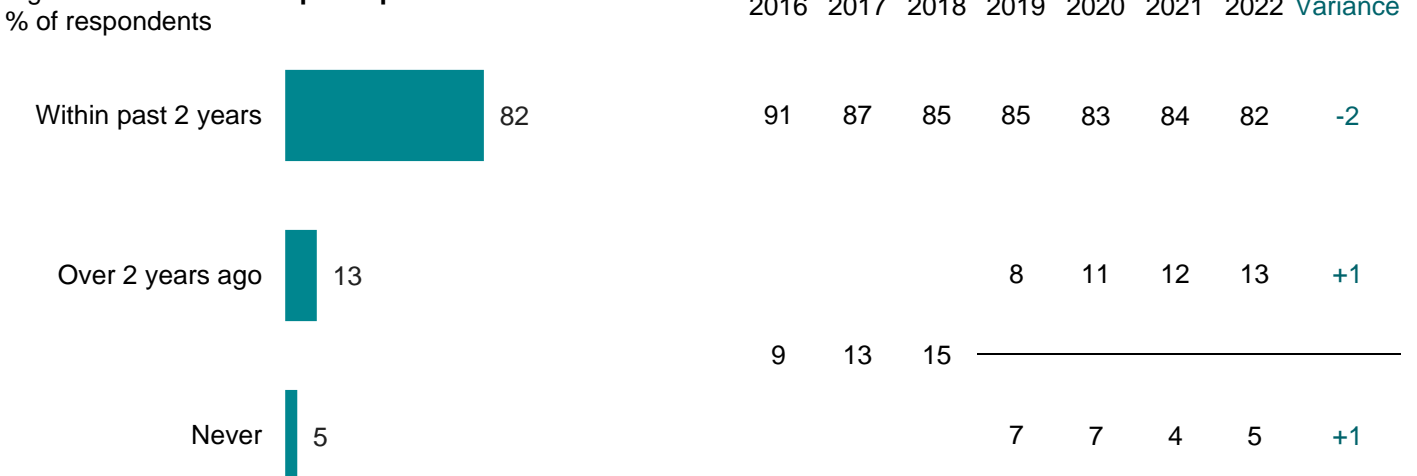
2019-2021 Q2. How many times did you attend or participate in arts and cultural activities over summer?

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

95% of respondents have attended an arts or cultural activity before. Most (82%) attended an arts or culture activity within the past two years. 5% have never attended an arts or cultural activity (see Figure 32).

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 = 1297)

Please note variations in the questions from 2016-2018 and 2019-2022 represented in Figure 32:

2019-2022 Q2a. When was the last time you attended or participated in an arts and cultural activity?

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

13.5 Community variances in attendance | summary

Attendance patterns vary across the community. People living in the Western Suburbs and those with higher levels of education are most likely to attend or participate in art and culture frequently, at least once a month over summer (see Table 3). Frequent attendance is lower among Aboriginal and Torres Strait Islander people, and in the regions, in particular the Gascoyne, Mid West, Kimberley and Goldfields-Esperance regions.

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

% of respondents	At least once a month over summer Q2b	At least once over summer Q2b	At least once in the past year Q2a	Have attended before Q2c	Never attended Q2c
All respondents	33	71	74	95	5
Male	32	72	75	93	7
Female	33	69	74	97	3
17-34 years	38	77	80	95	5
35-54 years	36	76	78	97	3
55+ years	25	59	65	92	8
No children living at home	34	69	74	94	6
Have child aged 0-5	31	76	74	96	4
Have child aged 6-11	40	82	83	98	2
Have child aged 12-17	30	67	71	97	3
Have child aged 18+	28	69	77	96	4
High School	25	61	66	89	11
Diploma	30	72	76	96	4
Bachelor Degree	44	79	83	99	1
Postgraduate Degree or higher	46	82	84	99	1
Nil to \$30,000	25	56	60	91	9
\$30,001 to \$75,000	32	74	79	96	4
\$75,001 to \$150,000	34	73	76	94	6
More than \$150,000	36	73	76	96	4
Disability or impairment	31	68	72	92	8
Aboriginal / Torres Strait Islander	17	78	75	89	11
Born overseas	36	68	73	94	6
Mainly speak LOTE at home	28	56	66	96	4
Metro	36	73	77	96	4
Regional	25	63	67	92	8
Western Suburbs	57	80	84	98	2
Inner North	39	77	82	98	2
Inner South	42	80	84	98	2
Outer North	32	69	73	94	6
Outer South	29	70	73	94	6
Gascoyne	5	27	34	98	2
Goldfields-Esperance	14	59	59	86	14
Great Southern	31	82	87	100	0
Kimberley	12	59	59	89	11
Mid West	11	59	58	85	15
Peel	25	64	70	93	7
Perth	36	73	77	96	4
Pilbara	27	60	67	87	13
South West	32	60	64	97	3
Wheatbelt	28	68	69	90	10

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

Base: All respondents, excludes unsure (n=1312)

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

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

Base for Q2b/Q2c: All respondents who answered Q2b or Q2c, excludes unsure (n = 1297)

14 Motivations for participating in arts and cultural activities

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

Motivating factors have remained fairly steady over the past year. The biggest shifts were for interacting with family and friends, and relaxing or feeling less stressed. Both dropped by 5% points.

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

- Interest in content is more of a motivator for older people and in the Western Suburbs, and less of a motivator among Aboriginal and Torres Strait Islander people, and in the Goldfields-Esperance region.
- Experiencing new things is more of a motivator for people with higher income, for Aboriginal and Torres Strait Islander people, and in the Kimberley region.
- Having fun is more of a motivator in the Wheatbelt and for families with children aged five or younger.
- Interacting with family and friends is more of a motivator in the Gascoyne region and less of a motivator in the Western Suburbs.

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

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

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 = 1229)

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

% of respondents	Interest in the content	Experiencing new things	Having fun	Interacting with friends/family
All respondents	41	36	36	29
Male	38	34	36	23
Female	43	38	36	35
17-34 years	33	37	44	33
35-54 years	39	38	36	32
55+ years	51	34	28	22
No children living at home	44	34	32	25
Have child aged 0-5	32	43	50	48
Have child aged 6-11	38	41	44	35
Have child aged 12-17	40	32	41	33
Have child aged 18+	42	40	37	26
High School	43	33	42	30
Diploma	36	35	35	29
Bachelor Degree	40	39	39	29
Postgraduate Degree or higher	46	38	28	29
Nil to \$30,000	40	29	33	28
\$30,001 to \$75,000	38	33	32	23
\$75,001 to \$150,000	43	35	40	32
More than \$150,000	40	51	38	36
Disability or impairment	42	37	28	22
Aboriginal / Torres Strait Islander	15	50	37	41
Born overseas	44	41	31	25
Mainly speak LOTE at home	27	45	35	27
Perth Metro	43	36	36	29
WA Regional	34	36	37	32
Western Suburbs	57	39	28	12
Inner North	47	45	34	29
Inner South	33	39	35	25
Outer North	38	33	37	33
Outer South	48	30	38	28
Gascoyne	20	38	44	67
Goldfields-Esperance	12	23	38	41
Great Southern	39	25	43	31
Kimberley	25	67	14	20
Mid West	42	23	31	44
Perth	43	36	36	29
Peel	45	39	40	23
Pilbara	36	36	39	34
South West	32	37	31	32
Wheatbelt	25	38	52	38

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 = 1229)

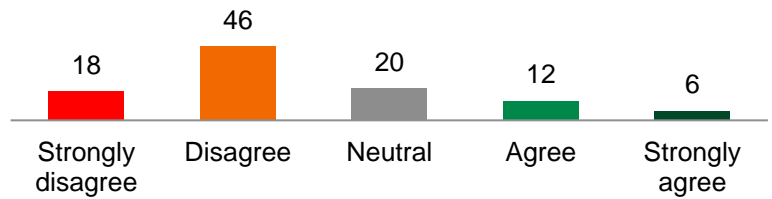
15 Few people agree that arts companies should rely on ticket sales alone

15.1 Level of Agreement

Only 17%* of respondents agree that “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”. 63% disagree with this statement (see Figure 34).

The mean score is 2.4 out of 5.0 and the Index Score is 36 out of 100.

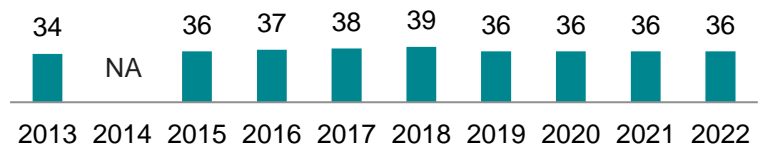
Figure 34: Overall Ratings
% of respondents



15.2 Trend Analysis

The Agreement Index Score has remained steady at 36 over the past four years (see Figure 35).

Figure 35: Trend Analysis
Agreement Index Score

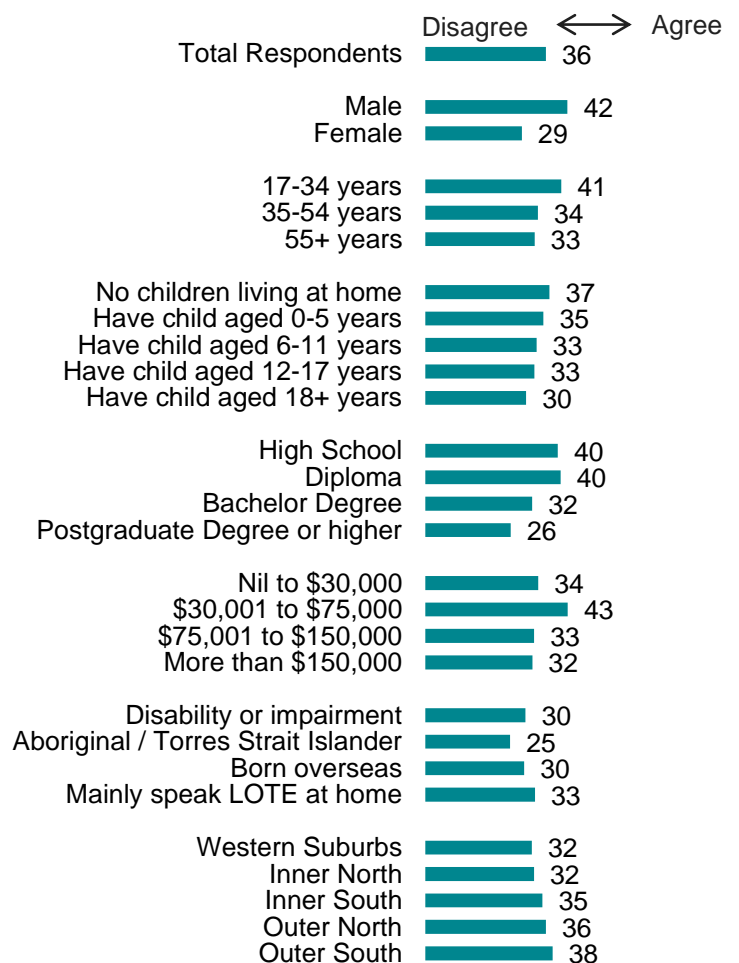


15.3 Community Variances

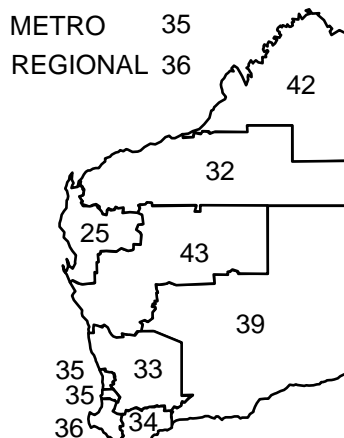
Level of agreement varies across the population. Females, those with higher levels of education and those with Aboriginal / Torres Strait Islander backgrounds are more likely to disagree that arts companies should rely on ticket sales alone (see Figure 36).

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

Figure 36: Community Variances
Agreement Index Score



Map 12: Regional Variances
Agreement Index Score



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

Base: All respondents, excludes unsure (n = 1294) NB: 4% of all respondents answered 'unsure'

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

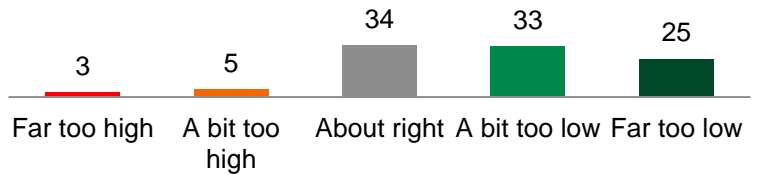
16 Perceptions of WA Government's allocation of just under \$2.73 per person per week for arts and cultural activities, services & facilities

16.1 Level of Agreement

When asked whether \$2.73 per person per week in allocation by WA Government for arts and cultural activities was too low, about right or too high, 58% thought it was too low (see Figure 37).

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

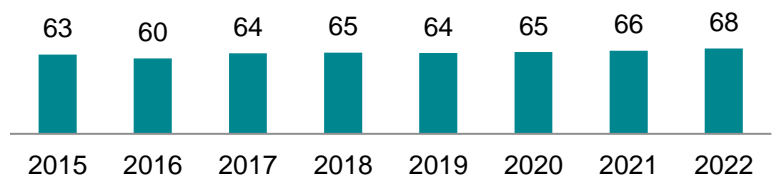
Figure 37: Overall Ratings
% of respondents



16.2 Trend Analysis

The Funding Allocation Index Score has reached a new all-time high at 68 out of 100 (see Figure 38) with more respondents indicating that the funding allocation is too low.

Figure 38: Trend Analysis*
Funding Allocation Index Score



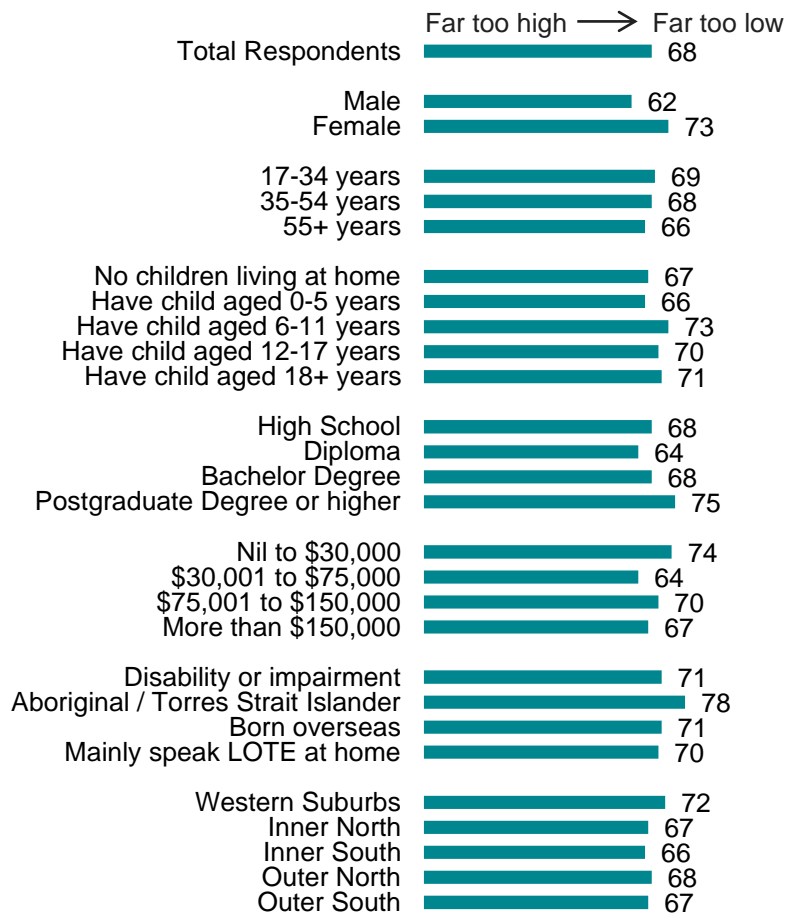
*Please note: 2015 and 2016 were based on a \$1 figure (calculated on "Arts" activities alone) compared with around \$2 per week spending for 2017 and 2018 and \$2.21 per week spending in 2019 to 2021 (calculated on "Arts and Cultural" activities).

16.3 Community Variances

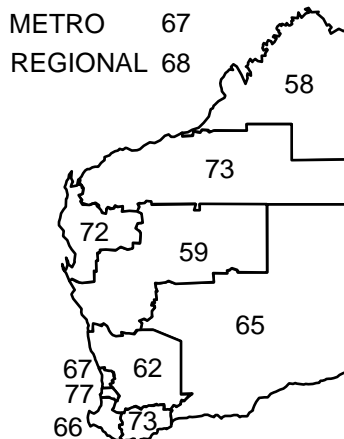
The general consensus across different population groups is that the current allocation of \$2.73 per person per week is too low (see Figure 39). The biggest variance is by gender, with females feeling this allocation is too low.

Across the regions, respondents in the Peel, Pilbara, Gascoyne and Great Southern regions are most likely to feel the current allocation is too low (see Map 13).

Figure 39: Community Variances
Funding Allocation Index Score



Map 13: Regional Variances
Funding Allocation Index Score



Q6a1. About \$2.73 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 = 1193) NB: 12% of all respondents answered 'unsure'

¹ Total Western Australian Government funding of \$141.98 expenditure per person including COVID-19 support towards Arts and Cultural activities as reported in the Meeting of Cultural Ministers Statistic Working Group, Cultural Funding by Government Survey 2019-20.

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

The percentage of respondents willing to pay more to improve access to arts and culture in WA is at an all-time high of 82% (see Figure 40).

While the percentage of people willing to pay up to \$2 more per week has decreased from 35% to 31%, 45% of respondents would now be willing to pay between \$2 and \$10 more, up 5% points over the past 12 months.

Consistent with recent years, 6% of respondents would be willing to pay over \$10 more per week.

The percentage of respondents who would not be willing to pay any more has steadily fallen over time from 29% in 2016 to 18% in 2022.

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

% of respondents	2016*	2017	2018	2019	2020	2021	2022	Variance
Not willing to pay any more	29	28	27	23	24	20	18	-2
Willing to pay \$0.01 to \$2 more per week	46	32	33	32	31	35	31	-4
Willing to pay \$2.01 to \$10 more per week	24	36	37	40	39	40	45	+5
Willing to pay over \$10 more per week	1	4	3	4	6	6	6	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 = 1145) NB: 15% of all respondents answered 'unsure'

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

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

- Respondents in the Great Southern region are least willing to pay any extra to expand provision of or to increase access to arts and culture in Western Australia.
- Respondents in the Peel, Kimberley and Pilbara regions are the most willing to pay some extra to expand provision of or to increase access to arts and culture in Western Australia.
- Respondents with Aboriginal and Torres Strait Islander backgrounds and those that speak a language other than English at home are most willing to pay over \$10 more.

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

% of respondents	None	\$0.01-\$2 more	\$2.01-\$10 more	Over \$10 more
All respondents	18	31	45	6
Male	18	34	43	5
Female	17	27	47	8
17-34 years	11	32	49	7
35-54 years	19	30	43	8
55+ years	23	29	44	4
No children living at home	18	30	46	6
Have child aged 0-5	17	34	42	7
Have child aged 6-11	18	30	44	7
Have child aged 12-17	15	27	51	8
Have child aged 18+	20	35	34	10
High School	21	33	38	7
Diploma	16	34	47	3
Bachelor Degree	17	27	49	7
Postgraduate Degree or higher	13	27	48	12
Nil to \$30,000	23	32	37	9
\$30,001 to \$75,000	12	36	48	4
\$75,001 to \$150,000	18	28	47	6
More than \$150,000	20	26	44	11
Disability or impairment	22	18	50	9
Aboriginal / Torres Strait Islander	7	18	53	22
Born overseas	16	27	48	9
Mainly speak LOTE at home	10	30	42	19
Metro	17	31	45	7
Regional	19	29	46	6
Western Suburbs	13	39	43	5
Inner North	13	33	47	7
Inner South	18	28	48	6
Outer North	20	30	42	8
Outer South	18	31	45	7
Gascoyne	26	27	34	13
Goldfields-Esperance	16	37	38	8
Great Southern	47	16	34	3
Kimberley	9	36	50	5
Mid West	34	40	25	1
Peel	8	36	49	6
Perth	17	31	45	7
Pilbara	10	14	64	12
South West	20	24	49	6
Wheatbelt	15	37	48	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 = 1145) NB: 15% of all respondents answered 'unsure'

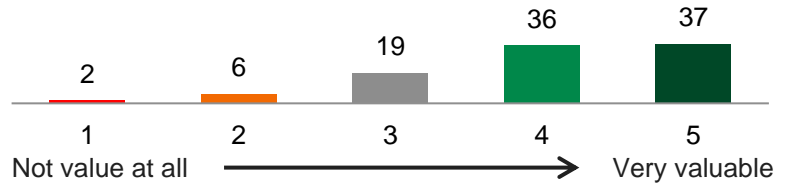
18 Value of WA film and television industry

18.1 Overall Ratings

When asked 'how valuable do you think the WA film and television industry is to the community', 73% 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.

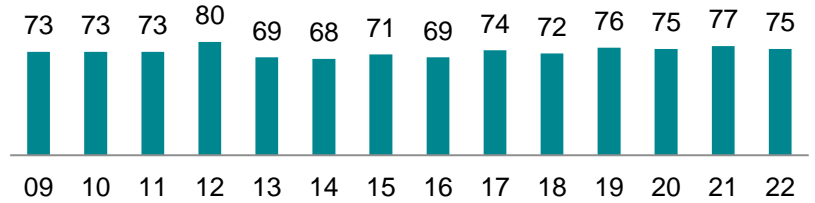
Figure 41: Overall Ratings
% of respondents



18.2 Trend Analysis

At 75, the Value Index Score has been steady over the past four years, fluctuating within 2% points (see Figure 42).

Figure 42: Trend Analysis
Value Index Score

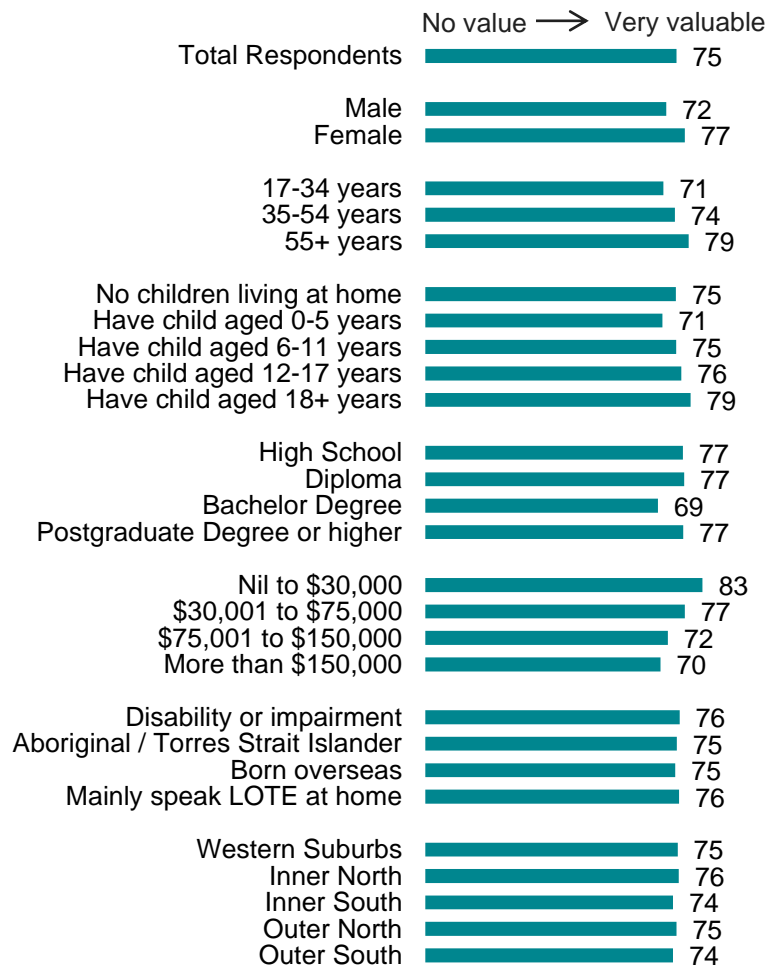


18.3 Community Variances

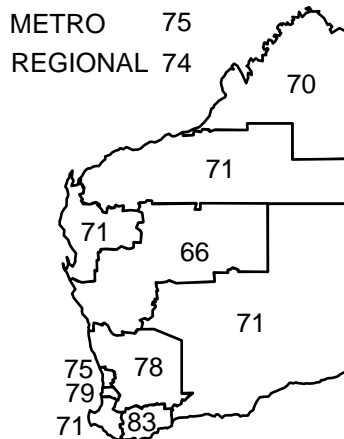
Perceptions of value vary across the community. Perceived value increases with age and is higher among those with lower levels of income (see Figure 43).

Across the regions, perceived value is highest in the Great Southern region and lowest in the Mid West (see Map 14).

Figure 43: Community Variances
Value Index Score



Map 14: Regional Variances
Value Index Score



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

Base: All respondents, excludes unsure (n = 1314) NB: 3% of all respondents answered 'unsure'

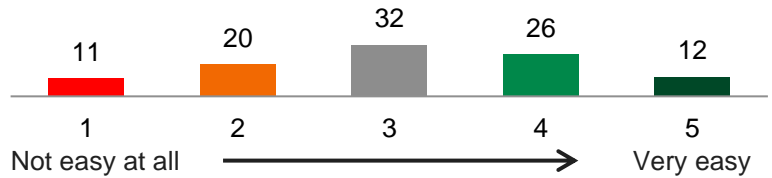
19 Accessibility of WA film and television productions

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 52 out of 100.

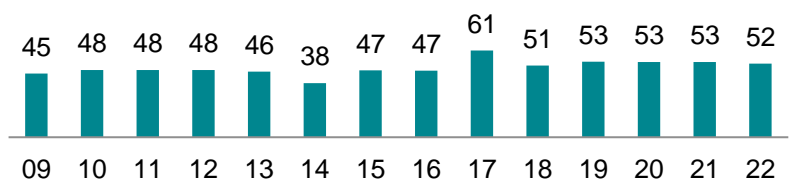
Figure 44: Overall Ratings
% of respondents



19.2 Trend Analysis

The Ease of Access Index Score has remained fairly steady over the past five years but down from a high of 61 points in 2017 (see Figure 45).

Figure 45: Trend Analysis
Ease of Access Index Score

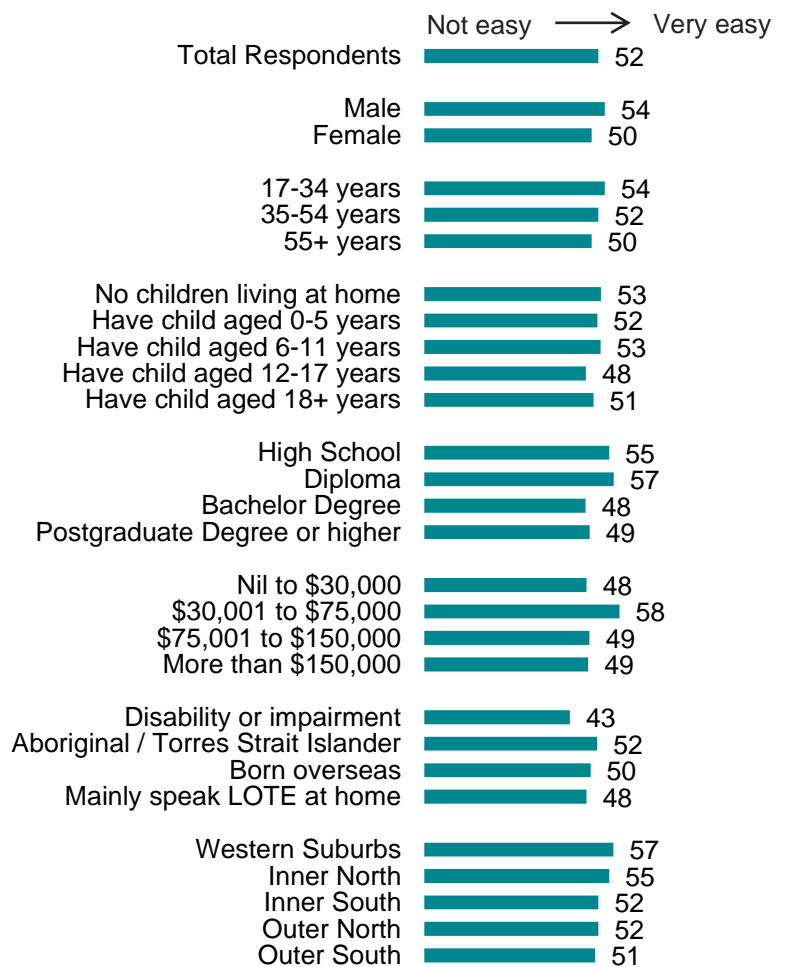


19.3 Community Variances

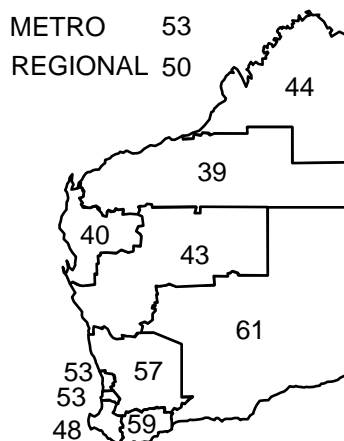
Ease of access is fairly consistent across the community. It is slightly lower among those with disability and slightly higher among those with lower levels of education, and annual income of \$30,001 to \$75,000 (see Figure 46).

Across the regions, ease of access is higher in the Goldfields-Esperance and Great Southern, and lower in the Pilbara, Gascoyne, Mid West and Kimberley regions (see Map 15).

Figure 46: Community Variances
Ease of Access Index Score



Map 15: Regional Variances
Ease of Access Index Score



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

Base: All respondents, excludes unsure (n = 1166) NB: 14% of all respondents answered 'unsure'

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

20 Missed arts and culture activities during COVID-19 restrictions

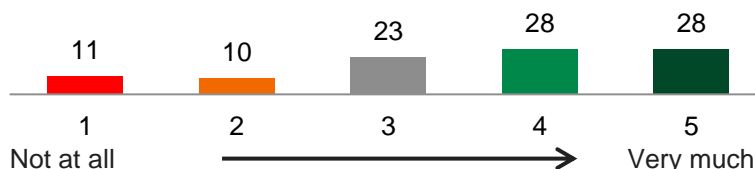
20.1 Overall Ratings

Since March 2020, COVID-19 restrictions have impacted opportunities to attend and participate in arts and culture activities.

When asked “to what degree did you miss being able to attend or participate in arts and culture activities?”, 56% of respondents provided a rating of 4 or 5 out of 5, where 5 means very much (see Figure 47).

The mean score is 3.5 out of 5.0 and the Index Score is 63 out of 100.

Figure 47: Overall Ratings
% of respondents

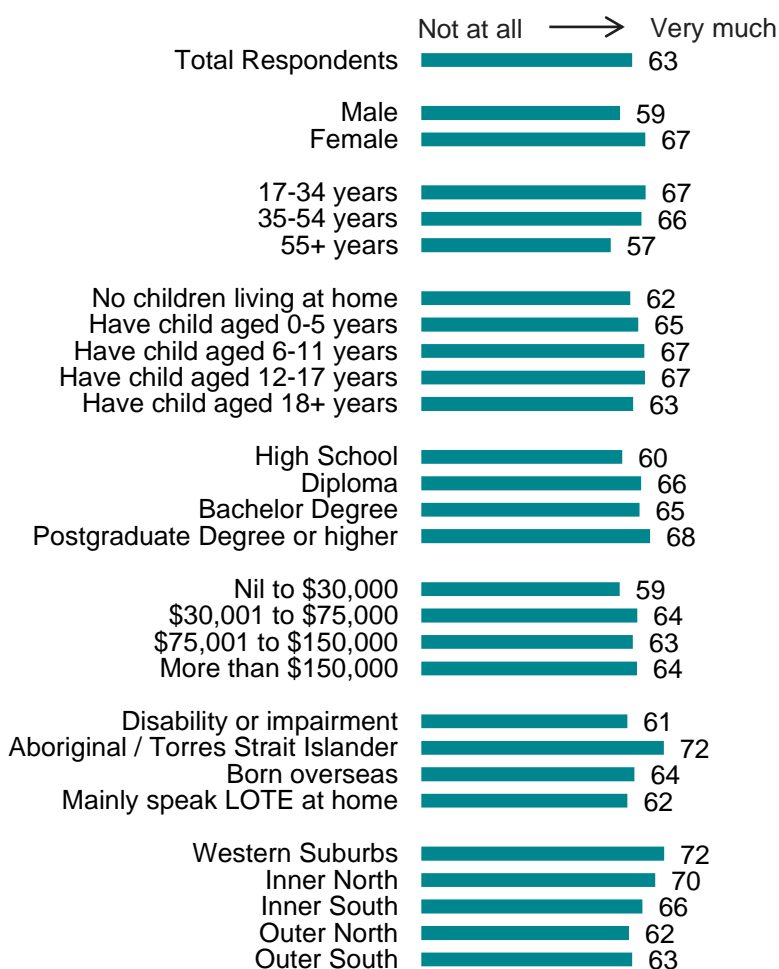


20.2 Community Variances

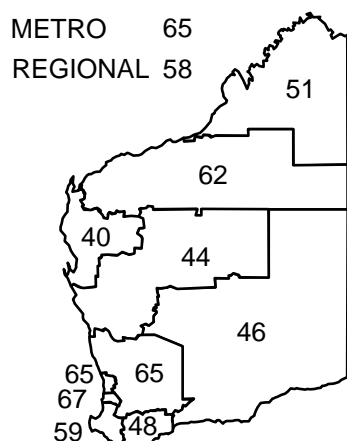
The degree to which attending arts and culture activities was missed varied across the community. Arts and cultural activities were mostly missed by respondents in the western and inner northern suburbs of Perth and those with Aboriginal / Torres Strait Islander backgrounds (see Figure 46).

Across the regions, art and cultural activities were mostly missed in the Peel, Perth and Wheatbelt regions, followed by the Pilbara region (see Map 15).

Figure 48: Community Variances
Index Score



Map 15: Regional Variances
Index Score



Q8. Over the past 12 months, to what degree did you miss being able to attend or participate in arts and culture activities due to COVID-19 restrictions? Base: All respondents, excludes unsure (n = 1317) NB: 3% 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. RANDOMISE ORDER
- 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 \$2.73 per person, per week is allocated by WA Government for arts and cultural activities, services and facilities in WA, including COVID-19 support. Do you consider this amount to be too low, about right or too high?
- Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA? Nothing; \$0.01 - \$1.00; \$1.01 - \$2.00; \$2.01 - \$5.00; \$5.01 - \$10.00; \$10.01 - \$20.00; \$20.01 +; Unsure
- Q7a. The West Australian Government, through Screenwest, provides financial support to help individuals and companies make film, television, and digital media in Western Australia. How valuable do you think the Western Australian film and television industry is to the community? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".

- Q7b. How easy is it for you to access Western Australian produced film and television productions? Please use a scale of 1 to 5, where '1' is "not easy at all" and '5' is "very easy".
- Q8. Over the past 12 months, to what degree did you miss being able to attend or participate in arts and culture activities due to COVID-19 restrictions? Please use a scale of 1 to 5, where '1' is "not at all" and '5' is "very much".

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