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PATTERNMAKERS



MARCH 2021

Western Australia Snapshot

Audience Outlook Monitor



Department of
Local Government, Sport
and Cultural Industries

Summary

Confidence in WA is high, but attendees are relying on adherence to COVID-safe policies

The March 2021 results of the Audience Outlook Monitor show that confidence among WA audience members remains high, after months of low cases.

More than 3 in 4 (77%) past attendees in WA say they have recently attended a cultural venue or event and 4 in 5 (83%) are making firm plans to attend an event in future. WA audiences are among the most confident nationally and their comfort attending most venues is stable or higher than it was in September 2020, such as museums and galleries (99%), stadiums or arenas (84% up from 65%) and live music venues (66%, up from 58%).

However, some people remain cautious when COVID-safety measures are not properly adhered to, or when they've observed complacency at WA venues and events. While case numbers are low in WA, adherence to and communication of the existing COVID safe policies will help to reassure those with a lower risk tolerance – particularly that efforts to avoid future outbreaks are taken seriously.

Online participation is lowest in WA, but there is appetite for on-demand content and online courses

Consistent with national trends, the proportion of WA audiences participating in online arts and culture has declined from 60% in September 2020 to 41% in March 2021 – and WA audiences remain some of the least engaged online, compared to the national average (47%).

Among WA audiences, those who experience a serious health vulnerability, or live with someone who does, are more likely to be engaging online (44%) compared to those who do not (39%).

Among a list of potential features, there is strong appeal among WA audiences for content to be accessible on-demand (65%) and for content to feature artists or artistic leaders talking about their work (38%). Attendance in online courses or tutorials is now the second most common method of participation (17%), after pre-recorded video (22%), confirming a potential opportunity area for further investment.

Introduction

This report summarises insights from data collected in March 2021 from over 1,800 WA audience members

This Western Australia (WA) Snapshot Report identifies insights from 1,813 survey respondents connected with WA organisations surveyed in March 2021 as part of the Audience Outlook Monitor. Launched in May 2020, the study is tracking audience sentiment in relation to the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving 130 arts and culture organisations, including museums, galleries, performing arts organisations, and festivals. On 3 March 2021, participating organisations simultaneously sent the Phase 4 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018.

Throughout this report, comparisons have been highlighted between the different state and territory results. Note that the Northern Territory (NT) and Tasmania (TAS) samples in this study fall below 100 respondents, and this data has been marked with an asterisk (*) within graphs to indicate that the results should be interpreted with caution.

In addition to this report, the March 2021 results are freely accessible in an interactive dashboard. Users can explore the data for all different artforms, types of events and demographic groups in all parts of Australia.

For more information about the study, and to access resources such as the dashboard, visit: www.thepatternmakers.com.au/covid19

Read on for the key March 2021 findings in Western Australia.

Current conditions

Comfort with public activities is growing and WA audiences are the most confident nationally

As cases of the virus in WA have been generally lower and fewer restrictions have been in place, WA past attendees have been the most confident nationally since data collection started in May 2020. Even after a small outbreak leading to a five-day lockdown in late January, confidence in interacting publicly has increased.



Since September 2020, the proportion of WA audiences who now feel comfortable doing a range of activities has been stable or increased, including eating at a local restaurant (99% feel at least somewhat comfortable, stable with 98%), using public transport (92%, up from 81%) and exercising at a gym or fitness studio (83%, up from 76%).

WA audiences are most similar in their comfort levels to those in South Australia (SA), Queensland (QLD) and the NT. By comparison, audiences in Victoria (VIC), New South Wales (NSW), the Australian Capital Territory (ACT) and TAS are showing lower levels of comfort.

Attending cultural events

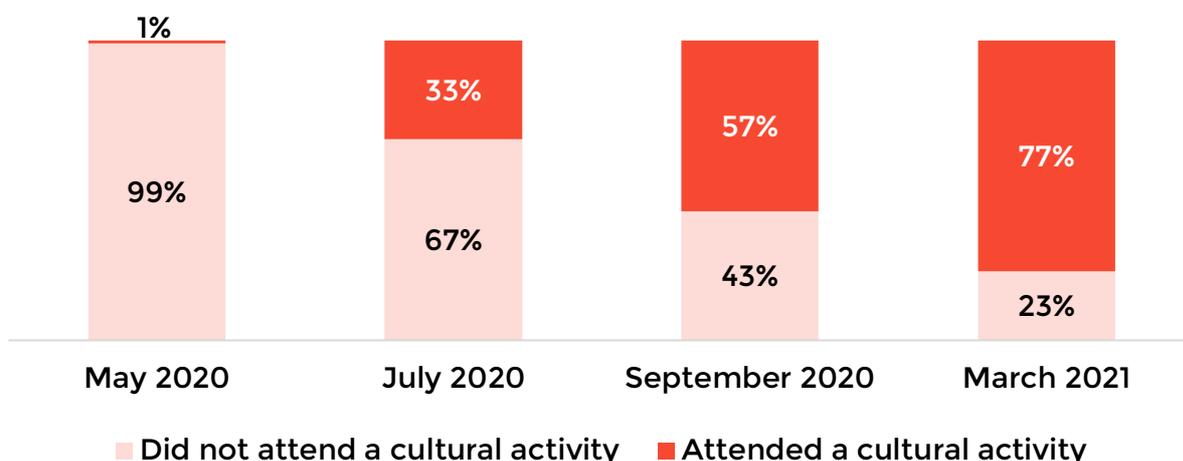
3 in 4 WA audience members are now attending live events

Attendance at live arts and cultural events is increasing, as venues and facilities continue to program activities in accordance with COVID-safe regulations in WA.

In March 2021, 77% of WA audience members attended a cultural activity in-person within the fortnight before data collection, a rate that has increased since September 2020 (57%).

In terms of the types of activities engaged with, almost half (49%) of WA respondents said they recently attended a live performance. Many recently attended a cinema (33%), visited a museum or gallery (27%), while smaller proportions recently attended a lecture, artist talk or workshop (23%) or a fair or festival (19%).

Figure 1: In the past fortnight, did you do a cultural activity in-person (not online)? (WA) n=1,813 (March 2021)





WA audiences are attending events at a higher rate than other areas, such as VIC (62%), QLD (69%) and the ACT (73%), where larger outbreaks have led to increased restrictions and lower audience confidence in comparison.

Figure 2: In the past fortnight, did you do a cultural activity in-person (not online)? (By state/territory) n=13,836

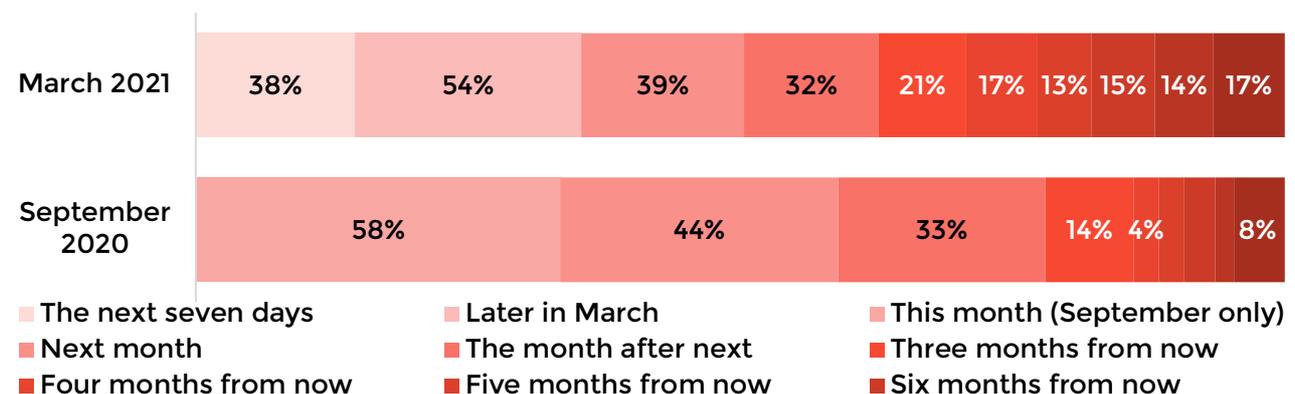


4 in 5 are making plans to attend in future — consistent with the national average

WA audiences are signalling greater confidence in attending events in the near future, compared to September 2020. In the two weeks before data collection (3–7 March 2021), 4 in 5 (83%) stated they made firm plans to attend an event in future, with most planning to attend a live performance (59%), a museum or gallery (31%) or a cinema (39%).

A majority of WA audiences are purchasing tickets for events in the month ahead — either for events within the seven days following data collection (38%) or later in the month (54%). A significant number said they were purchasing tickets for events in April (39%).

Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? (select multiple) (WA) n=685





Concerns about virus transmission are lowest in WA relative to other areas

Health risks and financial barriers are less prevalent in WA relative to other states and territories.

Since September 2020, the proportion of WA audiences who know of someone within their social network who has been sick with the virus has been stable (5%, stable with 7%) and the proportion experiencing financial hardship as a result of the pandemic has dropped from 35% to 22%.

Among WA audiences, just 14% say that the risk of virus transmission prevents them from attending as they did in the past. WA audiences are the least likely of any state/territory to report that this factor is preventing them from attending, compared to a national average of 26%.

Concerns about virus transmission are strongest in VIC (34%) and NSW (32%), where cases have been the highest nationally, and lowest in WA, SA (20%) and QLD (21%).

Even though the majority of WA audiences are 'ready to attend' (80%), a small proportion (2%) still cannot foresee going out until there is no risk at all (down from 6% in September 2020), confirming that observing COVID-safety guidelines will be important for reassuring those with a lower risk tolerance.

The main barrier inhibiting attendance right now is the risk of lockdown and cancellations

When asked about the factors preventing audiences from attending right now, the top factor selected by WA audiences was the risk of lockdowns and cancelled events (30%). One WA audience member mentioned,

'Booked events being cancelled completely or rescheduled to dates that I can't attend or my group of friends cannot all attend.'

Restrictions and COVID-safe arrangements are also limiting attendance, with some audiences indicating that events are booking out too quickly (25%) or that there are not as many options available (23%). Another WA respondent shared,

'Because there are less events, they are booking out very quickly and I have also noted the prices have increased. I know people need to make up costs from last year but our personal financial circumstances haven't changed so paying more for arts tickets is hard to justify.'



1 in 3 WA attendees are spending over \$100 on tickets — though overall spending is unlikely to fully recover this year

One-quarter (24%) of WA audiences attending in the past fortnight said they spent between \$50 and \$100 on tickets, and 36% spent more than \$100. This represents a significant increase on levels seen in September 2020, when 16% spent more than \$50 and 13% spent more than \$100.

Over the next 12 months, 22% of WA audiences say they expect their overall spending on arts and culture tickets, admissions, subscriptions and memberships to be lower than before the pandemic started. This rate has increased from September 2020, when the proportion who said they expect to spend less was 13% – confirming that it will take time to fully rebuild the market.

Comfort levels

WA audiences are growing more comfortable attending most venue types — and are the most confident nationally

Comfort levels attending most venue types has been consistently high or growing in WA, as restrictions have been moderate and virus cases have remained low relative to other areas. Almost all WA audience members are confident attending museums and galleries (99% are at least somewhat comfortable, stable since September 2020), community art spaces/studios (97%, stable with 96%) and large theatres or concert halls (95%, up from 84%).

Comfort has also increased for venues that WA audiences have been more cautious of in the past, including stadiums or arenas (84% up from 65%) and comedy clubs or live music venues (66%, up from 58%).

A larger proportion of WA audience members now feel comfortable attending hands-on exhibits at an interactive museum (73%), a rate that has significantly increased since July 2020 (47%) and September 2020 (56%).

Seating capacity inside venues is a concern for some audience members

While a majority of WA audiences now feel comfortable attending most indoor venue types, limits on attendance numbers are an important factor.

Capacity limits affect the viability of operation, but from an audience perspective, reduced seating capacities appear to encourage people's perceptions of safety, for instance:

- Almost all WA audiences (97%) feel at least somewhat comfortable at 50% seating capacity
- Most people (93%) feel comfortable with 75% seating capacity
- Two-thirds (66%) feel comfortable with 100% seating capacity inside venues.

As there is a segment who still feel uncomfortable at venues with full capacity, there may still be a case for some large venues, festivals and arts centres to voluntarily impose capacity limits for certain events, as it would allow them to be accessible to a larger proportion of audience members.

More people are comfortable to attend if masks are mandatory, though some prefer activities that don't require them

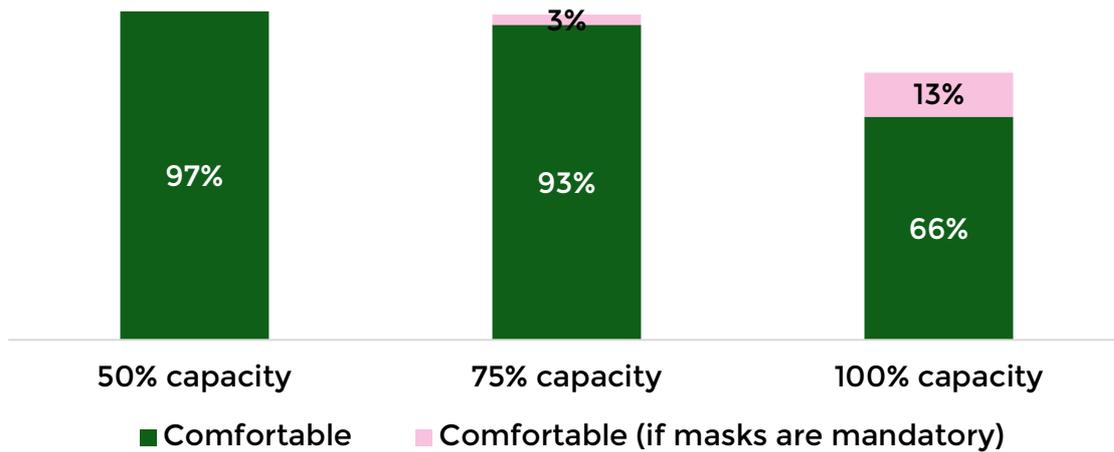
Respondents who said they were not comfortable at venues were asked whether their answer would change if mask-wearing was mandatory.

At an event with 75% seating capacity, the majority of those not previously comfortable said that it would improve their comfort (14% would be very comfortable and 46% would be somewhat comfortable) - meaning the overall proportion of audiences comfortable at this capacity rises from 93% to 96%.

At an event with 100% seating capacity, a significant proportion of those not previously comfortable said that it would improve their comfort (6% would be very comfortable and 37% would be somewhat comfortable) - meaning the overall proportion of audiences comfortable at this capacity rises from 66% to 79%.



Figure 4: Would you be comfortable attending an event today with 50%/75%/100% seating capacity? (With and without mandatory mask policies.) (WA) n=1,743



One WA respondent said,

‘In practice, people in the space do not remember to maintain 1.5 to 2m distance. To compensate, masks should be worn. This should be compulsory for all.’

Some respondents shared that they are discouraged from attending events that have mandatory mask policies, as one said,

‘If you have to wear a mask I probably won’t attend.’

The combination of capacity limits, social distancing and mask-wearing is confusing for some — and can affect confidence

With mask policies, seating arrangements, capacity and social distancing all affecting people’s choices to attend events, the situation in all states and territories is complex.

It is important to clearly communicate what these policies mean, with some sharing their confusion at how capacity and distancing rules are applied in practice. Some mentioned inconsistencies in social distancing policies, for instance, one person said,

‘While the number of attendees was limited, seats were allocated very close to one another with no social distances. It is even worse in the foyer where there was not much room for people to keep distance during the intermission.’

Another shared,

‘Venue spacing is inconsistent. Some venues have rows but not adjacent seats separated, others have adjacent seats but not rows. Not alarming, just confusing.’

Comfort with square-metre regulations has increased, but some don’t see any benefit

In March 2021, the proportion of WA audience members who feel comfortable with square-metre policies is stable or higher compared to September 2020. Most are at least somewhat comfortable with 2 square metres (94%, up from 90%) and 4 square metres (95%, stable with 97%) of space for each person.

Similarly to capacity restrictions, comfort is only improved when the regulations can be properly enforced. One WA respondent shared uncertainty about this method, commenting,

‘Enforcement of social distancing measures would be a comforting factor. I am not sure how it would be possible though.’

The proportion who are now comfortable with no social distancing guidelines has increased in WA from 33% in September 2020 to 55% in March 2021. Comfort levels with no social distancing guidelines are highest in WA and lowest in VIC (28%), NSW (30%) and the ACT (36%).

Creative approaches to seating can help more people feel comfortable and engaged

One of the common themes in audiences responses about recent events is social distancing and the way it presents a challenge for creating a buzzing atmosphere.

Events that find ways to create a great ‘vibe’, whilst observing guidelines, will be important for WA audiences. Some people like events with ‘pods’ or tables of 4–6 people (17%) where they can sit close to people in their immediate social circle. For instance, some WA respondents said,

‘I feel the ‘pods’ of four would feel the closest to a ‘normal’ concert experience with family and friends.’

‘I like the idea of the pods of people because it means that one could sit together with one’s group but be socially distant from other groups.’



The grouped model doesn't work for everyone and an outdoor amphitheatre with fixed seating in rows ranked higher (37%). Another WA response suggested some hesitation with being seated next to people they don't know, commenting,

'It's the unknown in being mingled with strangers in the pod of 4-6. How can you rely on other people?'

Comfort is highest at outdoor venues, which may impact attendance as winter approaches

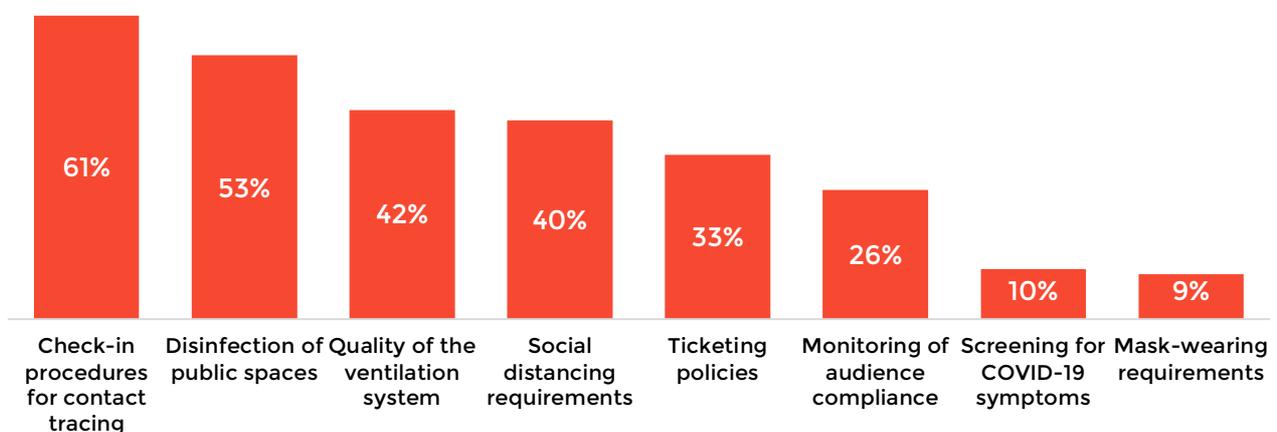
As winter approaches, some people are concerned about the weather affecting outdoor events, as well as the potential for transmission of the virus in indoor venues. Many WA audience members (42%) said communication about ventilation and air circulation is important in communication about venue safety. When commenting on what they would like to hear about, one person suggested,

'How the air conditioning works with a simple explanation on the board in the foyer what type it is and how it circulates the air.'

To feel reassured about safety regulations, the other common topics WA audiences are interested in hearing about are check-in procedures for contact tracing (61%) and the disinfection of public spaces (53%).

Compared to the national average (27%), WA audiences are less interested in communications about mask-wearing policies (9%), potentially as this safety measure has been less prevalent across the state, relative to other jurisdictions.

Figure 5: In thinking about attending cultural venues and events, which of the following topics are most important to you? (select up to three) (WA) n=1,799



COVID-19 safety

Overall, WA audiences are largely satisfied with COVID-safety at cultural venues

When recent attendees were asked how satisfied they are with audience safety at the venue(s) they attended, the vast majority are satisfied.

Looking at specific aspects of COVID-safety plans, there are some slight differences relevant to different venue types. For instance, on average:

- ▶ At cinemas, communication of COVID-safe practices was rated least well and limits on capacity had the highest satisfaction
- ▶ At live shows and performances, physical distancing measures rated least well, while presence of check-in procedures had the highest satisfaction
- ▶ At fairs and festivals, physical distancing measures rated below other types of safety measures.

Some people are conscious about others' complacency due to lower cases in WA

Some WA audience members expressed that while WA has had a generally low number of virus cases, there is a sense of complacency being observed at venues and events. This has been mentioned in relation to both venue staff and other attendees. One audience member shared,

'Social distancing has become less stringently followed in WA due to our good run with COVID-19 cases. [We] need to be prepared to reactivate this again if required.'

Another commented,

'Some venues are good at spaces between groups – others are not. Audiences are poor at physical distancing generally, but I live in Perth where there is significant complacency due to our fortunate position in relation to COVID.'

Staff and signage continue to be important ways to reassure audiences

Audiences who feel cautious about attending continue to make suggestions for improving communication of COVID-safe arrangements, and in particular signage and written instructions. One WA audience member suggested,

‘I still see people entering venues without ‘checking in’ but I don’t think it’s reasonable to expect venues to staff the door at all times. Perhaps some more signage could help.’

Audiences generally also appreciate clear instructions from staff and some believe there is a case for a stronger commitment of staff to regulate COVID-safe procedures, as one shared,

‘I think it is important for owners/staff to feel empowered enough to demand each patron scans or signs in. I have heard some places are a bit slack and people just walk in. This is obviously easier to control at a ticketed venue.’

Longer-term outlook

95% of WA audiences say they are likely to get vaccinated, which is expected to further improve confidence

The commencement of Australia’s vaccination program is already contributing to confidence levels and the outlook is positive. Almost all WA respondents (95%) said they are likely to get vaccinated for COVID-19 and most do not have major concerns about issues like the effectiveness of the vaccine.

Looking ahead, 9 in 10 WA respondents (91%) feel confident that the vaccination effort will lead to the resumption of normal activities within 12 months. Around 4 in 5 (84%) say that long-term, they expect to attend events just as they used to in the past.

Support and fundraising

WA audiences remain strongly committed to supporting the arts

The proportion of WA audiences who said they feel strongly committed to supporting arts and cultural organisations has grown from 35% to 47% since May 2020.

More WA audience members say that they are likely to purchase a subscription or membership to a cultural organisation (68%, up from 55%).

Likelihood to show other methods of support has been consistent or higher among WA audiences, such as making a donation to an artist or organisation (68%, stable with 67%) or donating to a general sector support fund (54%, stable with 51%).

WA audiences continue to subscribe and purchase memberships to show their support

In March 2021, 51% of WA audience members said they have already purchased a subscription, membership or season tickets to a cultural organisation for the 2021 season. This is slightly smaller than the proportion who reported having subscribed to last year's season (55% were subscribed as of September 2020).

However, among those who have purchased, 89% said they are planning to renew their subscription/membership next year, which is an increase from September 2020 (when 75% had planned to).

A majority of WA audience members purchased a performing arts subscription (44%), while fewer purchased a museum or gallery pass (5%) or a subscription to another type of organisation (9%).

The rate of donations has increased marginally in WA — and there is desire to support those that are struggling

The proportion of WA audiences making donations to artists or cultural organisations in the 2020/21 financial year (34%) is slightly larger compared with 2019/20 financial year (31%).

When asked what specifically prompted their donation, several WA respondents explained that they wanted to show their appreciation for artists and organisations during the pandemic. One person shared,

'I'm aware of the lower attendances due to COVID and want to add my support to keep the arts industry going.'



Online participation

2 in 5 are participating online, and many more plan to continue

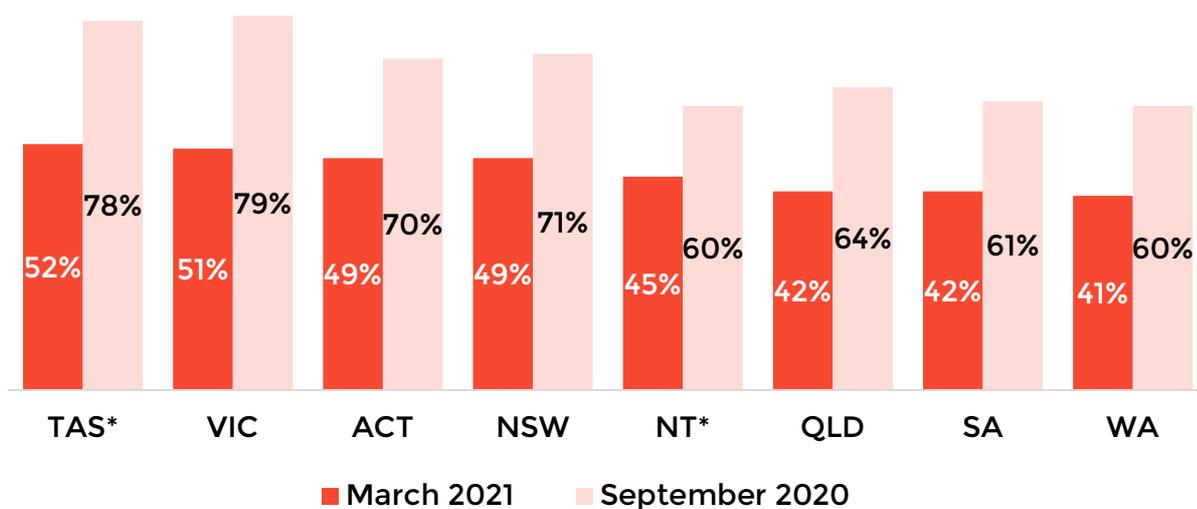
As opportunities for live attendance have continued to expand in WA, fewer audience members say they recently participated in digital arts and culture experiences (41% in March 2021, down from 60% in September 2020).

Compared to other jurisdictions, WA audiences are the least engaged online nationally, followed by those in SA (42%) and QLD (42%). In comparison, online participation is highest in VIC (51%), NSW (49%) and the ACT (49%).

Among the 41% participating online, a sizeable proportion say they are doing so more frequently than before the pandemic (42%) and almost three-quarters of those plan to continue when it ends (72%). A smaller proportion (17%) say they're participating online less frequently, or plan not to continue post-pandemic (28%).

Some segments appear to be more engaged than others, for example audience members who experience a serious health vulnerability or live with someone who does, are more likely to be participating online (44%) compared to those who do not (39%).

Figure 6: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select multiple) n=13,836





Video content remains popular, but online courses are becoming relatively more common

Video content of performances and events continues to be a popular form of digital participation, with 22% of WA audiences recently watching pre-recorded video of a performance (down from 35% in September 2020) and 16% recently watching a live stream (down from 26%).

Online classes and tutorials are now a comparatively common way that WA audiences are choosing to participate online (17%), as this option is now the second most popular form of attendance. This rate is also higher among audiences under 35 (24%), confirming an opportunity area for potential exploration and investment by WA organisations.

Increasingly, WA audiences are motivated to access things they can't see live

When asked about their motivations for participating online, data collected in the early stages of the pandemic (May 2020) showed that the most common reason given by WA audiences were to support an artist/organisation they think is important (39%) or for their own mental wellbeing (36%).

In March 2021, the most common reasons given are seeing something you had wanted to see live (42%) and seeing something you wouldn't normally be able to see (31%).

A significant proportion are still motivated to go online to support an artist or organisation they think is important (25%) and some are still going online for their wellbeing (20%). WA audiences are also now more inclined to find out more about an artist or creative work by participating online (20%, up from 16% in May).

As with audiences nationally, some people want less 'screen time' — while others are unaware of digital options

Since this study first measured the barriers to online participation in May 2020, the proportion of WA audiences who say they're 'not interested in online or digital arts experiences' has risen from 18% to 29%. WA audiences, along with those in SA (29%), are the most likely to hold this sentiment.



The qualitative data shows that some audience members are eager to focus on live attendance opportunities, as one said, 'Online is too much like work. I have far too much screen time as it is.'

Others shared that they aren't aware about digital offerings, as one person stated,

'[I now] gather there are a lot of 'on-line' options available. I had not realised there was much going on in this space at all. I will now start actively searching but am not sure where to start!'

There may be opportunities to improve marketing and communications about digital arts and culture activities to grow engagement with WA audiences who are unable to access live experiences.

1 in 3 WA audience members participating online continue to pay for digital experiences

The proportion of online audiences in WA that are paying for digital content has decreased marginally in March 2021 (32%), compared with September 2020 (29%). Compared to other jurisdictions, such as NSW (42%), the ACT (42%) and VIC (39%), for example, WA audiences are among the least likely to be paying for online experiences, along with QLD audiences (29%).

The types of payment for digital experiences are changing, with fewer WA users reporting having made a donation for something they consumed online (10% down from 15% in September).

Pay-per-view remains the most common form of digital patronage, and has increased slightly since September 2020 (15%, up from 12%). A small number (7%) say they subscribed to a platform to access content on-demand and 6% say they accessed digital content as a part of a program or season they subscribed to.

Making content available on-demand is appealing for most audiences – and many want to hear artists talking about their work

Designing digital experiences is complex and there are audiences for different types of experiences, though some features appear more popular than others.

Respondents were provided with a list of seven potential features of digital arts experiences, and asked to select the top two most appealing to them.



The ability to access something on-demand was the most popular choice for WA audiences (65%) and ranked higher than seeing something live that is happening right now (35%). Another popular feature among WA audiences was hearing the artist or artistic leader talk about their work (37%).

Accessing short, edited segments or taster experiences was in the top two features for 16% of WA audiences, and 14% said they would like tips on how to improve their own skills or appreciation of an artform. Smaller numbers preferred connecting with other audience members during the experience (4%) or contributing to the experience themselves (2%).

What's next

To explore the data in more detail and find out how audiences for different artforms are responding, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19

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

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

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

Acknowledgment

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



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