



PATTERNMAKERS



AUDIENCE
OUTLOOK
MONITOR

PHASE 2

Western Australia Snapshot

Audience Outlook
Monitor, July 2020



GOVERNMENT OF
WESTERN AUSTRALIA

Department of
Local Government, Sport
and Cultural Industries



Summary

The Phase 2 (July 2020) findings of the Audience Outlook Monitor in Western Australia (WA) demonstrate an increasingly optimistic outlook, compared to findings in Phase 1 (May 2020).

WA audiences are among the most confident nationally to attend cultural venues and events today. More than one-third (37%) now say they are ready to attend events when it is permitted, compared to 25% in May 2020, and 33% attended a cultural event of some kind in the fortnight before data collection.

When ranking options for attending a cultural event today, most WA audiences would choose an outdoor event as their first (44%) or second preference (32%). While 1 in 4 (27%) would select digital participation as their preferred option, a significant proportion would rank this option last (46%), demonstrating a desire to return to live, in-person events.

Qualitative feedback reveals that while many WA audiences are confident with attending venues in a relatively 'normal' fashion, some people are still cautious. There is a view that more could be done to enforce social distancing, and that cultural organisations need to remain vigilant in following safety guidelines. Communication is the key to reassuring those who feel vulnerable and welcoming back the broadest possible audience.

The situation in Victoria (VIC) and New South Wales (NSW) in July 2020 may assist WA arts and cultural organisations with scenario planning.

Introduction

This WA Snapshot Report identifies insights from 1,996 survey respondents connected with WA arts and culture organisations participating in the Audience Outlook Monitor.

Beginning in May 2020, the study involves bi-monthly data collection to track how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic.

Each phase involves a cross-sector collaborative survey process involving over 150 arts and culture organisations, including museums, galleries, performing arts organisations and festivals across Australia. Participating organisations simultaneously sent a survey to a random sample of their audiences, who had attended a cultural event between January 2018 and May 2020.

Phase 2 results, from over 15,000 respondents, have been combined with Phase 1 data in a freely available dashboard. The dashboard is designed to provide insights about all different artforms, types of events and demographic groups in all parts of Australia.

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

Read on for the key Phase 2 findings in WA.

Current conditions

WA audiences are among the most confident nationally

Between May and June 2020, the number of confirmed cases of the virus nation-wide fell and restrictions on events were loosened around Australia.

In WA, audiences are showing much higher levels of comfort engaging in public activities in Phase 2 compared to Phase 1. The proportion who are at least somewhat comfortable to eat at a local restaurant increased from 72% to 96%, and those who are comfortable using public transport increased from 54% to 75%.



WA audiences are similar right now to those in Queensland (QLD), the Northern Territory (NT) and South Australia (SA), where concerns about community transmission are lower than states such as Victoria (VIC), New South Wales (NSW) and the Australian Capital Territory (ACT).

Returning to events

37% of WA audiences are ready to attend cultural events today

Between May and July 2020, the proportion who are ready to attend cultural events 'as soon as permitted' has increased in WA (37%, up from 25% in May 2020), and is now 9% higher than the national average (28%).

WA audiences are among the most confident currently, with only 7% saying they cannot see themselves going out until there is no risk of transmission (compared to 11% nationally).

With many arts and cultural venues having re-opened, albeit in restricted ways, WA audiences are starting to return to events. 1 in 3 (33%) WA audience members attended a cultural event of some kind during the fortnight before data collection, which is higher than the national average (24%).

The majority of WA audiences are now comfortable to attend a range of cultural venues

The overwhelming majority of WA audiences now say they feel at least somewhat comfortable walking around a museum or gallery (99%, up from 93% in May 2020), visiting a community art space (95%, up from 86%) and attending an outdoor festival or concert (81%, up from 71%). These are spaces where distancing between the audience is normal.

WA audiences are also demonstrating more confidence in attending venues seating 50 people (92%, up from 65%), 100 people (84%, up from 46%) or 500 people (54%, up from 27%), assuming they were open and following relevant guidelines regarding safety and social distancing.



Comfort level with venues seating 250 people was also investigated in Phase 2 for the first time, and 67% of WA audiences are confident in attending, compared to 52% nationally.

A majority are at least somewhat comfortable to attend venues such as a large theatre or concert hall (73%, compared to 61% nationally) and a stadium or arena (54%, compared to 45% nationally). The proportion that are comfortable attending a venue seating 1,000 people is 42%, compared to 31% nationally.

When reflecting on different social distancing measures, audiences in WA are also among the most likely to feel comfortable in a venue with just two square-metres per person enforced (85%, compared to 64% nationally).

WA audiences who feel comfortable attending a more intimate comedy club or live music venue has increased (52%, up from 35%), but remains lower than other seated venues at this time.

Many WA audience members are optimistic about returning to events long-term

Across the country, more people are now saying that they believe the pandemic will negatively affect their attendance long-term. The majority of WA audiences expect to attend the same amount as they did before the pandemic (74%, compared to 78% in May 2020). The proportion who expect to attend less has increased slightly since May (20%, up from 15%).

WA audiences are most similar in their long-term outlook to those in NT, where 18% expect to attend fewer events, and QLD (19%). Other states/territories are slightly more cautious about long term attendance, such as VIC (23%), ACT (23%) and NSW (22%), where there are concerns about escalating cases of the virus and potential duration of the pandemic.



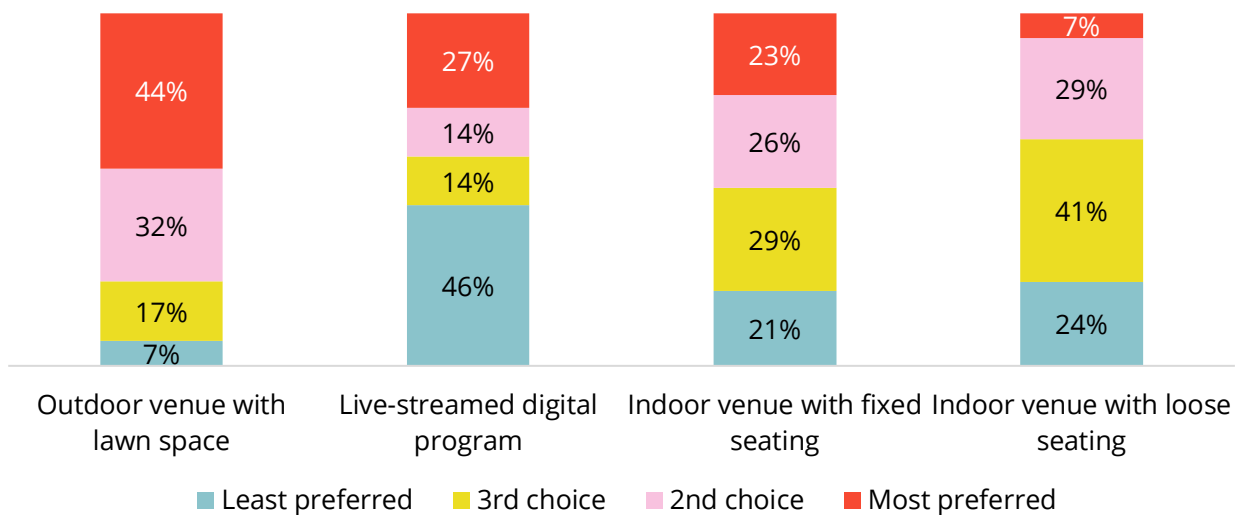
WA audiences are most favourable to outdoor events at present

For the first time in Phase 2, respondents were invited to rank a number of options for attending cultural events today:

- ▶ An indoor, flat-floor space with loosely placed chairs for 100 people to spread out
- ▶ An indoor hall with fixed seating for up to 100 audience members seated according to current social distancing guidelines
- ▶ An outdoor venue with lawn space only (bring your own blankets or lawn chairs), assuming there is plenty of space for 100 people to spread out
- ▶ A live-streamed digital program that you can watch from home.

The results (Figure 1) show that not everyone agrees on their preferred choice, though there are some options that satisfy more people.

Figure 1: Rank the four options for attending a cultural event today (in order of preference for WA audiences). n=1,853



A significant proportion (44%) of WA audiences selected an outdoor venue as their first preference for attending a cultural event today. One person shared,

‘I think I would prefer the "real experience" not online, because it would be more enjoyable, and seated outside (provided the weather wasn't really stormy) would be the best with open air and have less chance of spread sickness’.

There is evidence that a greater proportion of people would have selected outdoor events as their first preference, if the weather was permitting. As one said,

‘It is too cold and possibly wet to attend outside events and be guaranteed comfort. In summer, however, this would be my most preferred option’.

Nevertheless, it should be noted that some are cautious that social distancing still needs to be regulated at outdoor events.

There is strong interest in digital programs – but this option is polarising

The second largest proportion of WA audiences (27%) selected digital programs as their most preferred option for attending a cultural event today. Commentary from audiences shows that this is viewed as the safest option for experiencing arts and culture, even when the risk of transmission is very low. One WA respondent said,

‘I have an existing medical issue and I'd hate to have my immunity compromised until I know we have COVID-19 wiped out in this country’.

Digital offerings appear to be valuable for people who would otherwise struggle to have access to arts and culture. One person shared,

‘Because of the need for wheelchair seating and the limitations of moving in spaces that might be crowded (like lifts and passageways) the home viewing option has been better for us in recent months.

Outdoor spaces can be difficult depending on accessible areas for watching in a wheelchair. Many venues do not publish enough information about this’.

However, the largest proportion of WA respondents chose this as their least preferred option (46%), indicating that while digital is safest for some, many would prefer to attend live events. One WA respondent mentioned,

‘I put the online one first because clearly its safest, but everyone is ready in WA (where infection rates are much lower) for bigger gatherings. Outdoor gatherings appear to be the safest.

I attended the Perth Black Lives Matter rally, for example, and haven't noted any spike in WA infection rates connoted with community spread’.

When attending indoor venues, WA audiences would prefer fixed seating over loose seating

WA audiences, like many across Australia, would prefer assigned seating when attending indoor venues, to ensure social distancing is applied. One person explained,

‘As it's WA, fixed seating with enforced social distancing is my preference. I don't really like online (it's [about] the experience) but understand it's more accessible at the moment...

I don't like to rely on other people maintaining appropriate distance (as a lot don't), so I'd prefer [if] this is enforced or marked in some way (gridded areas etc.)’

Another person mentioned that while people are feeling confident, social distancing is critical, ‘While we seem to be ok here in WA, with the upsurge in Victoria we can't be complacent’.

Audience experiences

Some feel confident that risks are low in WA right now, but most people appreciate steps taken by venues

When reporting on their recent experience attending live events, there is a view that the lack of community transmission in WA has minimised the risk of attending venues and events, allowing some audiences to feel relatively safe.



One person shared, 'Seated and social distancing worked well. I'm in WA, so things feel safer here'.

With national results showing that audience sentiment can change rapidly based on community transmission rates, WA organisations must remain vigilant to mitigate the risk of transmission. Following the approaches taken in VIC and NSW may assist with scenario planning in the event of an outbreak.

One person expressed their appreciation for the safety measures implemented by a venue,

'One performance was a short (1 hour) dance at the WA Ballet centre. The audience was small and arrival and exiting was managed to avoid crowding. The other event was a short outdoor opera concert with a small audience of friends. It worked well being outdoors and with a small number in the audience'.

Some audience members are concerned by a lack of social distancing

Although the risks are generally seen as low right now, some respondents expressed concern with the lack of social distancing among attendees. When asked what could be improved about their recent experience attending an event in-person, one person commented,

'There was little social distancing although the signs were prominent advising people to maintain a safe distance'.

Another person shared a similar sentiment,

'Some audience members did not seem to understand physical distancing, despite the venue's efforts to make it safer'.

Arranged seating is important in the successful application of social distancing

The design of seating arrangements is key to helping attendees to feel more comfortable, as some reported on their recent experience. One recent attendee shared,

‘There was sufficient space between seats and flexible seating to be able to create 'bubbles' where you could be closer to members of your own party’.

When asked what could have been improved during their live performance experience, one person said,

‘Due to the nature of the gig, the audience were seated rather close to each other and the performers, so more space would be an improvement’.

Additionally, another attendee emphasised that limited capacity is only effective when social distancing measures are also applied,

‘The audience cap felt a bit unnecessary, considering that they did not enforce social distancing’.

Clear communication will help reassure audiences that safety is a priority for venues

Several respondents shared that safety guidelines should be adequately communicated by the venue or event organiser. Reflecting on what could be improved about their experience, one person shared,

‘The clear communication of safety expectations, temperature checks on entry, immediate seating, contact tracing and hand sanitiser when entering’.

Enforcement of social distancing guidelines by staff is integral to a safe experience for attendees. One person said,

‘Despite telling me of their policy, they maybe didn't enforce it that much’.

Another attendee agreed, and added that transparency around safety procedures could have improved their experience,

‘There were no instructions [about] social distancing or other that I saw. At the moment, seeing that venues are being careful is reassuring’.

Future attendance

More than half (54%) of WA audiences are making plans to attend cultural events

Around the country, the proportion making plans to attend cultural events broadly follows consumer confidence about public interaction in general. Compared to May 2020, a greater proportion of WA audiences are now making plans to attend an event of any kind (54%, up from 14%).

Audiences in the NT (66%) are showing similar levels of confidence as those in WA, as a territory with no recent cases and high rates of confidence in border controls.

Among those who have made plans, WA audiences most commonly plan to attend a cinema (27%) or a live performance (23%).

When they return to cultural events, the majority of WA audiences expect to spend the same amount on arts and culture as before the pandemic (74%).

Among the WA audience members who say they will spend more in future (10%), the largest proportion expect to spend 20% more (41%). However, among those who say they will spend less when they return (16%), the largest proportion say they will spend 50% less (34%).

2 in 5 WA audiences are purchasing tickets for events less than one month out

Nation-wide, lead times for purchasing tickets are shorter than they were in May 2020, and the largest proportion of WA audiences are buying tickets for events less than one month in advance (43%). Ticket-buying horizons among WA audiences are most similar to those in NT, where 53% of audiences are purchasing tickets for this month (July 2020).

Just 9% of WA audiences are purchasing tickets for events in April 2021 or thereafter, compared to 20% of audiences nationally.



Further, WA audiences are currently spending more on in-person live events and cultural activities, compared to other states/territories. In fortnight before data collection, WA audiences were more likely to have spent \$50 or more on tickets (19%), relative to NSW (13%), VIC (13%) or the ACT (11%).

Participating at home

Since May, WA audiences are continuing to participate creatively at home

Although life feels like it has returned to 'normal' for many people, WA audiences are continuing to engage in creative activities at home at high rates.

A majority are listening to music (89%, stable since May 2020) and reading for pleasure (86%, stable with 88% in May).

There has been a slight drop in the proportion that have been making art and craft since May (42%, down from 45%), but this remains one of the most popular activities that WA audiences participate in at home.

Engagement in other activities has remained consistent, such as making music (24%, stable with 25% in May) creative writing (16%, stable with 17%) and making videos and doing photography (21%, stable since May).

Engagement in most online activities has decreased slightly

A clear majority are continuing to engage with digital arts and cultural experiences (68%). WA audiences are slightly less engaged online compared to audiences in VIC (77%), NSW (76%) or ACT (74%), where restrictions are more stringent and opportunities to attend live events are fewer.

A slightly smaller proportion of WA audiences are participating in all online activities, including watching pre-recorded events (46%, down from 50% in May), live-streamed performances (33%, down from 37%), doing online classes (28%, down from 33%) and seeing virtual exhibitions and tours (15%, down from 20%).

With a majority continuing to engage online, and some audience members only participating online, planning for digital distribution long-term remains important.



1 in 3 WA audiences are paying for online experiences

Since May 2020, the proportion of WA paying for online arts and culture experiences has remained stable at 30%.

Slightly fewer people are making donations following online experience they had (14%, down from 17%), suggesting that the reopening of venues may have allowed some WA audiences to show their support for artists and organisations in other ways.

However, when asked what their total spending online was, 38% have spent more than \$50, which is higher than the proportion in May 2020 (33%).

Digital offerings are providing access to quality arts experiences

When asked to describe the characteristics of the online experience that made it worth paying for, WA audiences commonly mentioned being able to access content they would not otherwise see. One shared,

‘World class performance that I wouldn't normally have the opportunity to see such as Broadway or the National Theatre at home. It fills a gap until I can see live performance again’.

Many other respondents shared that being able to financially support struggling creatives made the experience important. One commented,

‘I just felt it was so great that they shared. Total gratitude for sharing their talents that in other times they would have been paid for. It was so wrong that the arts were not compensated’.

While online participation in WA has decreased slightly, the proportion that are discovering new work has remained consistent at 28% (stable with 29% in May), confirming that digital distribution will continue to be important for WA artists and cultural organisations.



What's next

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

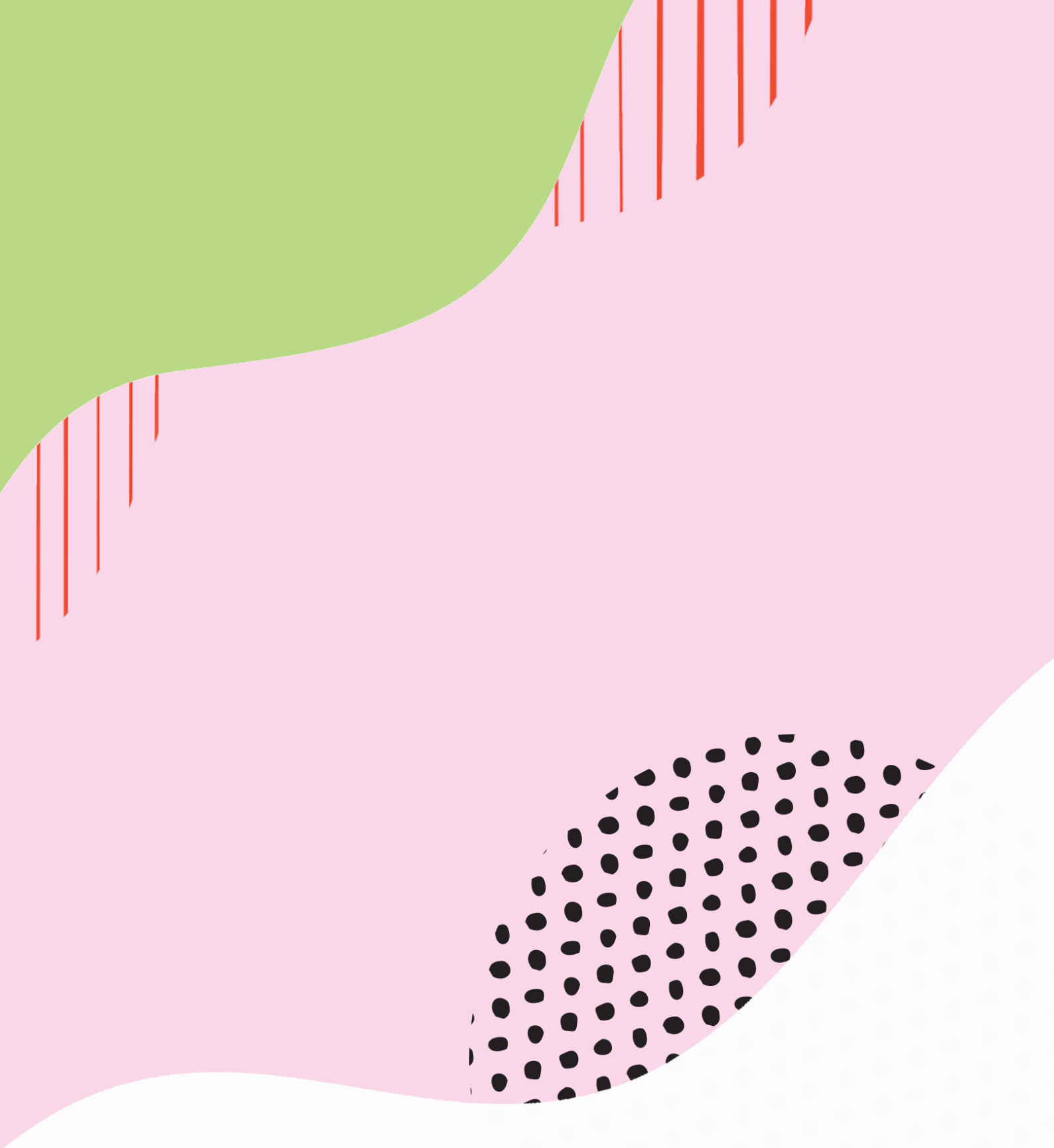
There you can access a range of Fact Sheets and a dynamic dashboard to help you explore the results by location, artform and other variables. Instructions and tips for using the dashboard are available in a short video.

Each month, the researchers release new insights about key regions, artforms and topics. They also provide tips and practical steps you can think about to apply the findings in your work.

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.

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



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