



## 2021 Arts & Culture Monitor Survey

Prepared for:

Department of Local Government, Sport and Cultural Industries

Prepared by:

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# 1 Executive Summary

**Art and culture continue to be of high importance to the community.**

**86% agree**

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

**95% 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 65.

- This is within one index point of the Value Index Score over recent years.
- Regionally, perceived value is highest in Perth's western suburbs and the Pilbara, and lowest in the Gascoyne.
- Perceived value is higher among people who mainly speak a language other than English at home.
- Perceived value is lower among males and people with disability or impairment.

Arts and culture is seen to have a valuable role in the community with a Value Index Score of 78.

- This is the highest score achieved in 13 years, up from a low of 68 in 2013.
- Community value is higher among females, people living in the other north suburbs of Perth and people with children aged 18 years or older.
- Regionally, community value varies between 70 points in the South West to 88 points in the Pilbara.

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

Only 16% agree that "the arts only helps those people who participate, not the broader community".

- The Agreement Index Score is 33, the lowest score achieved to date and a positive indication that fewer people think the arts only benefits those who participate.
- Level of agreement is fairly similar across the community. The greatest variances are by location. People in the inner and outer north suburbs of Perth, and in the Kimberley are more likely to think the arts benefit people in the boarder community.

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

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA?', the Value Index Score is 71, on par with recent years.

- The Value Index Score is higher among females and people with an Aboriginal or Torres Strait Islander background.
- Regionally, the Value Index Score is highest in the Kimberley and Pilbara.

When asked 'how valuable is the contribution of arts and culture to the identity of the state?', the Value Index Score is 72, on par with recent years.

- The Value Index score is fairly consistent across the community.
- Regionally, the Value Index Score is highest in the Kimberley and Pilbara.
- Females rate value higher than males.

**The arts continue to make people feel good.**

The Agreement Index Score is 79; the highest score to date.

- Level of agreement is fairly similar across the community; slightly higher among females than males.
- Regionally, perceived value is highest in the Gascoyne, Pilbara and Kimberley.

**Access to art and culture remains fairly easy, but wide gap between metro and regional.**

The Ease of Access Index Score is 66, fairly consistent with recent years.

- Access continues to be more difficult for people living in regional WA (56 points) compared to the Perth metro area (70). Access is most difficult for the Gascoyne region (20 points).
- It is also more difficult to access and participate in art and cultural activities for people with disability (55).

## **Annual participation in the arts may have been impacted by COVID-19 restrictions**

73% of respondents participated in an arts and cultural activity over the past 12 months.

- Participation is down slightly from 74% last year, and a high of 82% in 2019.
- Participation over summer dropped to an all-time low of 68%, down from 71% in 2020 and 82% in 2019.
- Overall, 96% of respondents recall attending or participating in an arts or cultural activity before which is an increase from 2020.

Frequent participation (that is, respondents who attended activities at least once a month over summer), is higher among those with higher levels of education and income.

- In the regions, frequent participation is highest in the Pilbara, Kimberley and Great Southern.
- Frequent participation is lowest in the Mid West, Gascoyne and Wheatbelt.
- The Mid West had the highest proportion of people who had never participated.

## **The main motivators for participating in arts and cultural activities are being interested in the content, experiencing new things, having fun and interacting with family and friends.**

The top four motivators have remained similar across the population.

- COVID-19 restrictions do not appear to have impacted motivators, with the possible exception of wanting to experience new things which increased by 5% points.
- Two of the stand out variances are that respondents in the Gascoyne region are much more likely to mention fun and interacting with friends and family as the main motivators.

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

Only 15% of respondents agree with the statement “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”.

## **80% 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.**

- 57% of respondents believe a government allocation for of \$2.21 per person per week for arts and culture is too low:
- 35% of respondents would be willing to pay up to \$2 more per week and 46% would be prepared to pay more than \$2 extra per person per week.

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

75% of respondents rate the industry highly.

- The Value Index Score is 77, the second highest score over recent years. The high score of 80 was achieved in 2012.
- Perceived value is fairly consistent across the community. Perceived value is slightly higher among seniors, and among those with lower levels of education and income.
- In the regions, perceived value is highest in the Peel region and lowest in the South West.

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

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 53 points. This is consistent with recent years, but down from a high of 61 points in 2017.
- Ease of access is best in Great Southern (59 points) and Kalgoorlie-Esperance (56 points).
- Ease of access is lowest in the Gascoyne region (35 points).

## **Extent to which arts and culture was missed during COVID-19 restrictions.**

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

54% of respondents missed being able to attend or participate in arts and culture activities quite a lot (giving a rating of 4 or 5 out of 5) due to the COVID-19 restrictions.

- Arts and culture activities were missed the most by people living in the western and outer north suburbs of Perth, by females and those on higher incomes.
- Arts and culture activities were missed the least by people in the Gascoyne (however, they also tend to report lower levels of access to art and culture generally).

## 2 Strategic Insights

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

### Strategic Insight 1

**Increase Government investment in arts and culture.** The arts are highly valued and 57% believes an allocation of \$2.21 per person by the State Government is too low.

### Strategic Insight 2

**Improve access and involvement in arts and culture activities.** The perceived ease of accessing arts and culture activities in Western Australia fell 2 index points, and participation and attendance hit a low of 73%; down from a high of 82% in 2019. Access and participation is highly likely to have been impacted by COVID-19 restrictions closing cultural institutions and venues.

Strategic areas of focus include people living in the Gascoyne region, people with disability, and low income earners, and more generally, people living in regional Western Australia. Access and participation in arts and cultural activities is lower among these population groups.

Strategies to reach and engage more people in arts and culture across the regions may include regional tours, activating, developing and supporting local talent, and novel development and use of technology and digital communications. When developing an attractive offer, it will be important to respond to the four top motivators: interesting content; opportunities for new experiences; being fun; and, enabling participants and audiences to build relations with family and friends.

### Strategic Insight 3

**Continue to improve access to arts and culture activities for children.** 95% of respondents agree that it's important for children to be able to access art and culture through their education. Innovative and cost-effective approaches that leverage new technologies to reach more children in school, in particular in regional and remote areas, could be considered.

### Strategic Insight 4

Continue to support and promote the **Western Australian film and television** industry. Perceived value continues to grow, and is highest among older people, and those with lower education and lower income. As these groups are generally less active in arts and culture activities, consider using film as a medium to extend their engagement in art and culture. For example, consider offering film screenings in different locations that are easy to access and low cost, but take them slightly out of their comfort zone to try new things, and blend experiences (i.e. combine film with other genres).

### Strategic Insight 5

Perceived **community value** is at its highest point, climbing 10 index points since 2013, with 77% of respondents stating they highly value arts and culture for the community. Sustained effort is needed to deliver community value, and to communicate the benefits of art and culture so that perceived value continues to grow. More effort is needed, in particular, to grow perceived relevance and value of art and culture among males.

### Strategic Insight 6

In a tight economic climate, innovative approaches are needed to support arts and culture organisations. Strategies could include appealing for more philanthropic support from people who place the highest value on arts and culture, partnering with corporations, and placing more emphasis on **community engagement** in arts and culture with a focus on learning programs and creating more spaces and opportunities for local artists to perform, in particular in regional and remote towns.

## 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 2021 Monitor was managed by the culture and the arts service area of the Department of Local Government, Sports and Cultural Industries (DLGSC). The study assists DLGSC with KPI performance evaluation and strategic planning.

Once again, the study was conducted using an online survey. 14,558 online panelists from Thinkfield were randomly selected and invited to complete an online survey between 22 March and 12 April 2021. 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.

1,328 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.

<b>Strategic Purpose</b>	To monitor behaviour and attitudes towards arts and culture.					
<b>Data collection type</b>	Online survey					
<b>Data collection dates</b>	22 March – 12 April 2021					
<b>Sample source</b>	Thinkfield Online Panel					
<b>Total invited</b>	14,558					
<b>Open Rate (# opened)</b>	35% (5,067)					
<b>Sample Size - # completed</b>	1,328					
<b>Response rate*</b>	27%					
<b>Sampling error</b>	$\pm 2.7\%$ at the 95% C.I.					
<b>Quotas</b>	By age, gender and location to match the population profile					
<b>Weighting</b> by age, gender and region to be representative of the population	<b>Males</b>			<b>Females</b>		
	<b>17-34</b>	<b>35-54</b>	<b>55+</b>	<b>17-34</b>	<b>35-54</b>	<b>55+</b>
<b>Gascoyne</b>	0.8420	0.8992	0.0793	0.2716	0.1781	0.0860
<b>Goldfields-Esperance</b>	2.4456	1.3059	0.4190	0.4733	0.3980	0.4543
<b>Great Southern</b>	1.0512	0.8019	0.3095	0.5651	0.3270	0.3580
<b>Kimberley</b>	1.5263	0.8150	0.5753	0.9847	0.4613	0.3119
<b>Mid West</b>	4.7975	1.0247	0.2825	0.3316	0.3903	0.2723
<b>Peel</b>	2.8944	1.7664	0.7792	0.4482	0.2449	0.4549
<b>Pilbara</b>	1.3226	2.8250	1.6616	0.4654	0.9326	1.0809
<b>South West</b>	3.0590	1.3612	0.9007	0.7790	0.7034	0.5787
<b>Wheatbelt</b>	6.5404	3.4925	0.4108	1.5823	0.6289	0.3517
<b>Perth</b>	0.9920	1.0158	2.5393	0.9205	1.2859	2.2629

\*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

43% of respondents were male, 57% were female and less than 1% answered non-binary.

#### Age

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

#### Lifestage

53% of respondents did not have children living at home. This includes single person households, group households, couples without children and empty nesters. 46% of respondents had at least one child living at home. 1% refused to answer.

#### Highest level of education attained

27% of respondents had a high school leaving certificate as their highest level of education, 24% had a diploma or advanced diploma and 38% had a Bachelor Degree or higher. 11% answered 'other' and 1% refused to answer.

#### Household income

37% of respondents had a combined household income before tax of up to \$75,000 and 52% were earning over \$75,000. 10% 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 a disability or impairment.

#### Ethnic diversity

29% of respondents live in a household where they or someone they live with was born overseas, 6% 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

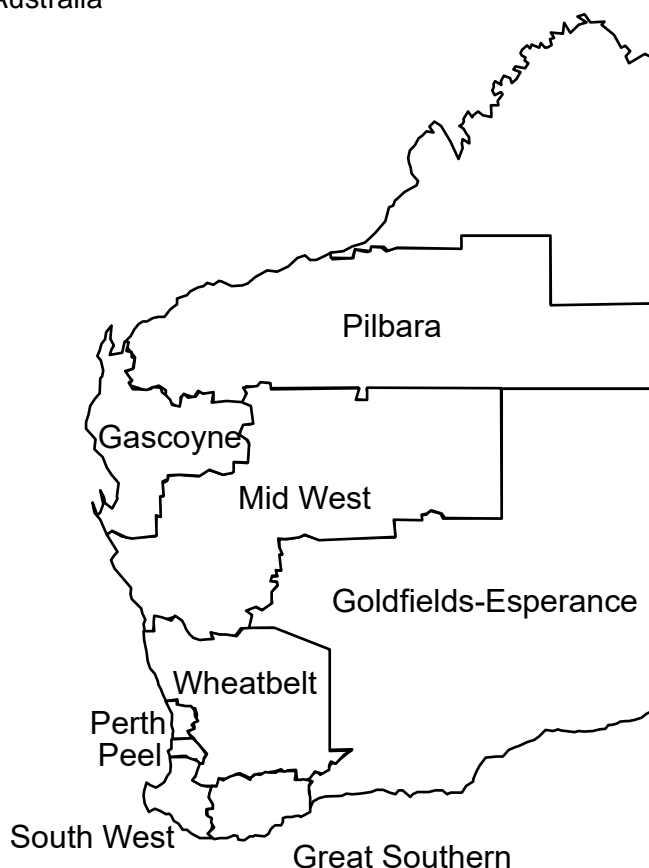
58% of respondents live in the Greater Perth Metropolitan area and 42% live in regional WA.

Postcodes were grouped as follows:

<b>Western Suburbs:</b>	6008-6015
<b>Inner North:</b>	6000-6007; 6016-6019; 6021; 6029; 6050-6053; 6059-6062
<b>Inner South:</b>	6100-6105; 6151-6154; 6156-6160
<b>Outer North:</b>	6020; 6022-6028; 6030-6038; 6041; 6044; 6054-6058; 6063-6090
<b>Outer South:</b>	6106-6150; 6155; 6162-6199
<b>Regional WA:</b>	6200-6999

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

Map 1: Regions of Western Australia



### 3.3 Analysis

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

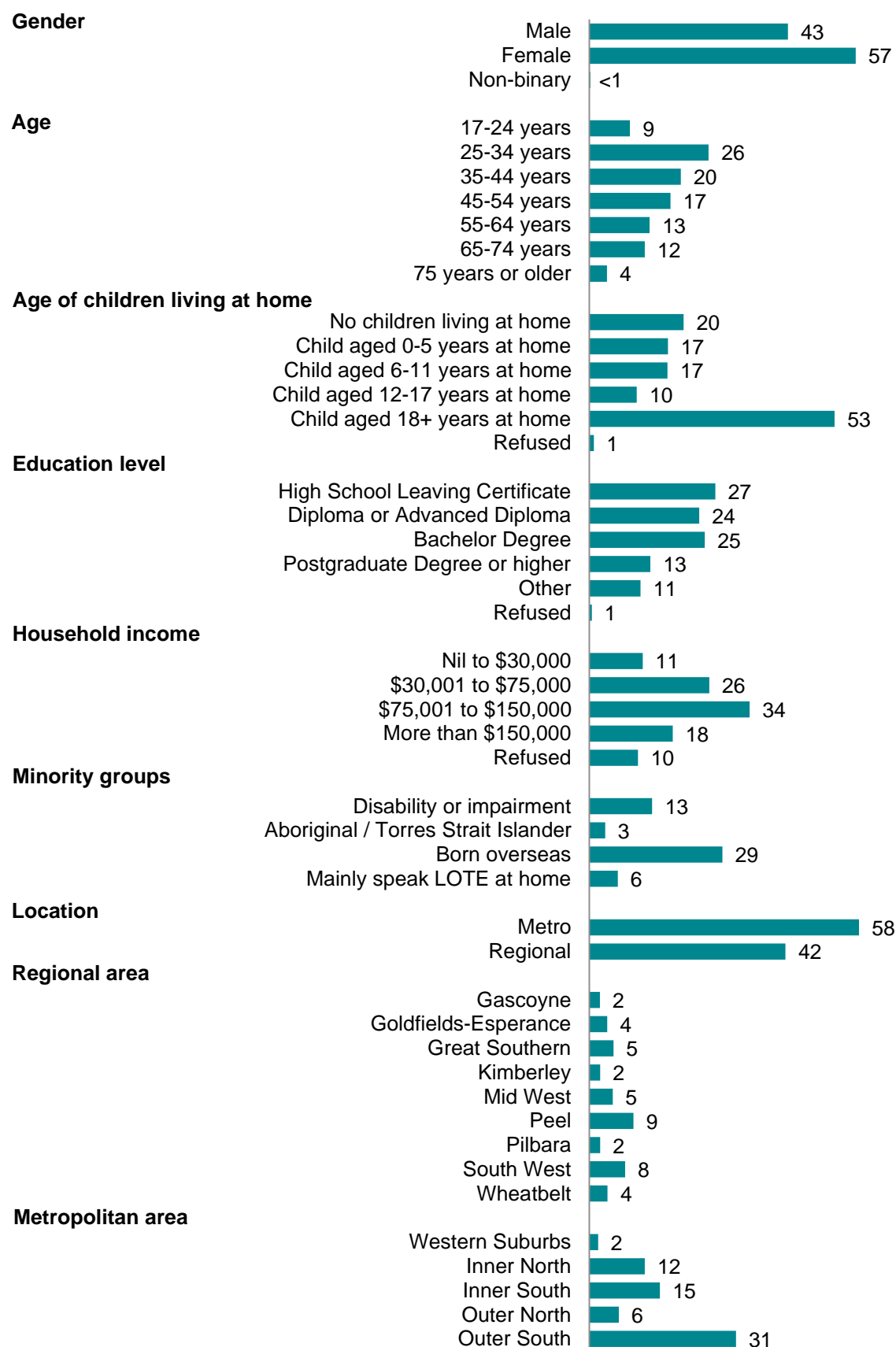
To calculate the Index Score, the survey percentage result is multiplied by an index factor, and the index value for each category is summed. An example is provided in Table 2. Unsure and non-responses are removed from the analysis.

Table 2: Index Score Calculation

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



**Figure 1: Sample Profile**  
% respondents, unweighted



## SURVEY FINDINGS

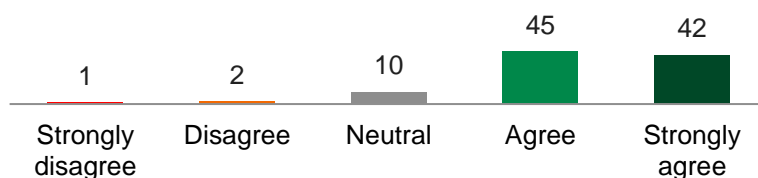
### 4 The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public

#### 4.1 Level of Agreement

86% 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). A subtotal variance of  $\pm 1\%$  is explained by rounding to zero decimal places.

The mean score is 4.2 out of 5.0 and the Agreement Index Score is 81 out of 100.

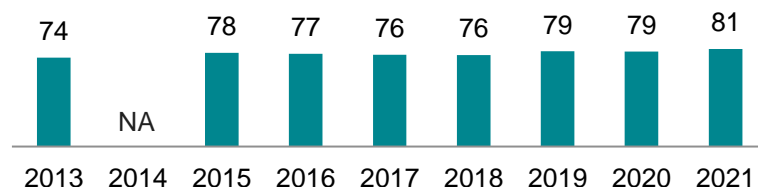
Figure 2: Overall Ratings  
% of respondents



#### 4.2 Trend Analysis

The Agreement Index Score has increased by 5 index points since 2018 and is the highest score to date (see Figure 3).

Figure 3: Trend Analysis  
Agreement Index Score



#### 4.3 Community Variances

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

Across the regions, those in the Pilbara, Gascoyne and Peel region are most likely to agree that the WA Government should invest in arts and cultural activities (see Map 2).

Map 2: Regional Variances  
Agreement Index Score

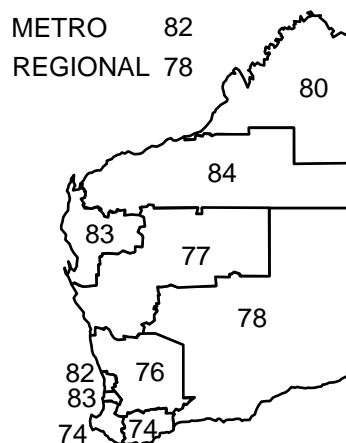
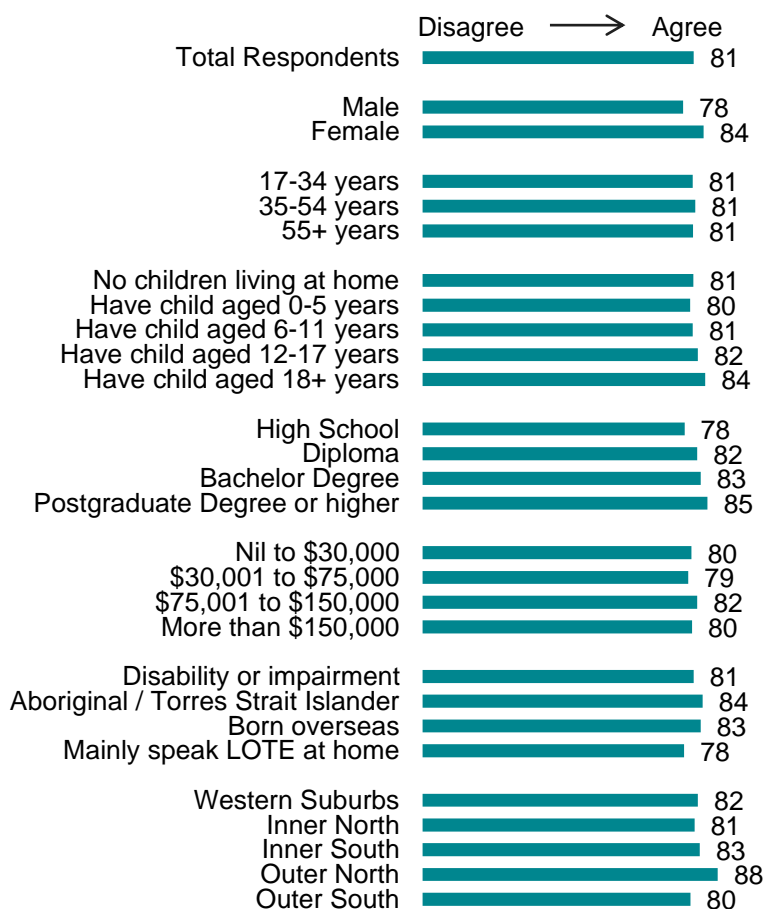


Figure 4: Community Variances  
Agreement Index Score



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 = 1306) NB: 2% of all respondents answered 'unsure'

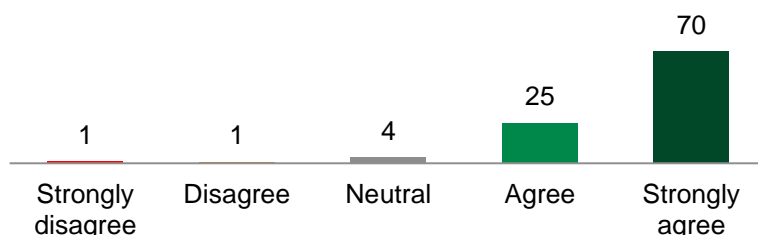
## 5 It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education

### 5.1 Level of Agreement

95% of respondents agree or strongly agree with the statement “it is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education” (see Figure 5).

The mean score is 4.6 out of 5.0 and the Agreement Index Score is 90 out of 100.

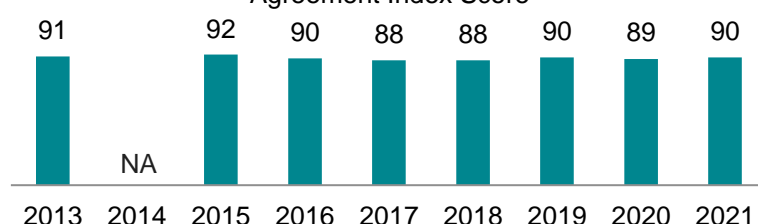
Figure 5: Overall Ratings  
% of respondents



### 5.2 Trend Analysis

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

Figure 6: Trend Analysis  
Agreement Index Score

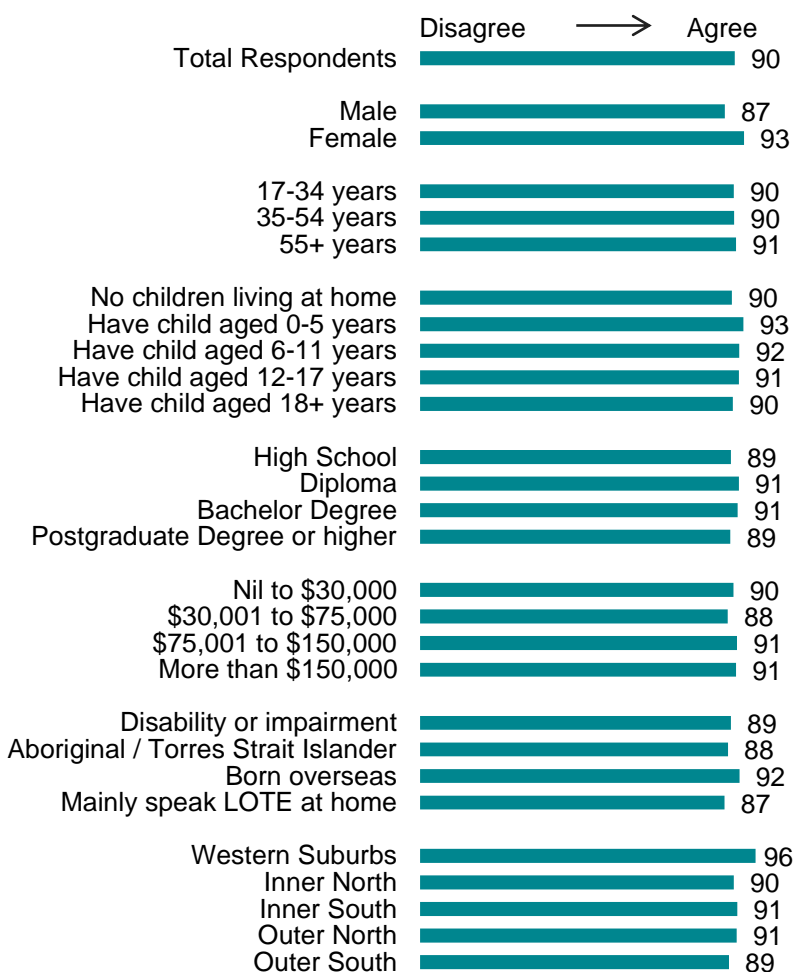


### 5.3 Community Variances

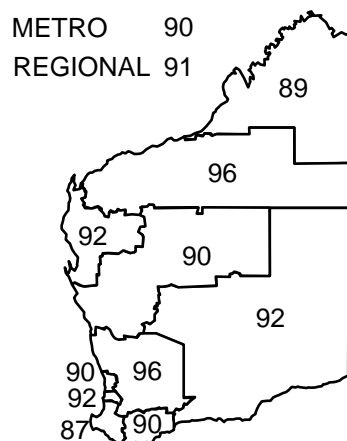
The Agreement Index Score is consistently high across the community (see Figure 7) and across regional areas (see Map 3), ranging from a score of 87 to 96.

People living in the western suburbs were more likely to agree.

Figure 7: Community Variances  
Agreement Index Score



Map 3: Regional Variances  
Agreement Index Score



**Q4. How strongly do you agree or disagree with the following statements?** It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education.  
Base: All respondents, excludes unsure (n = 1314) NB: 1% of all respondents answered 'unsure'

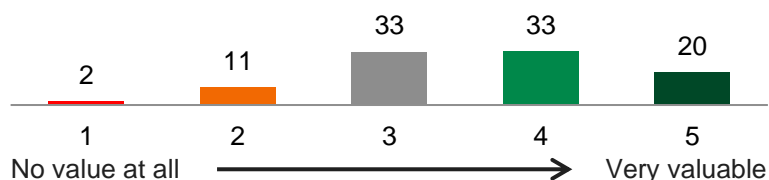
## 6 Perceived value of arts and culture for individuals

### 6.1 Overall Ratings

When asked 'how valuable is the role of arts and culture in your life?' 54% of respondents rate value highly (see Figure 8). A subtotal variance of  $\pm 1\%$  is explained by rounding to zero decimal places.

The mean score is 3.6 out of 5.0 and the Index Score is 65 out of 100.

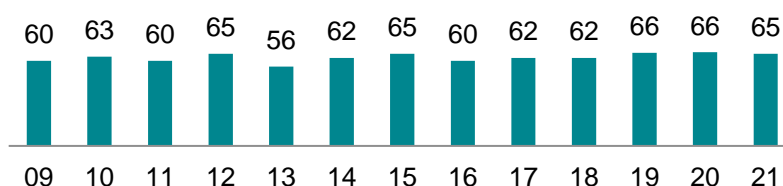
Figure 8: Overall Ratings  
% of respondents



### 6.2 Trend Analysis

Value Index Score has remained relatively steady over recent years (see Figure 9).

Figure 9: Trend Analysis  
Value Index Score

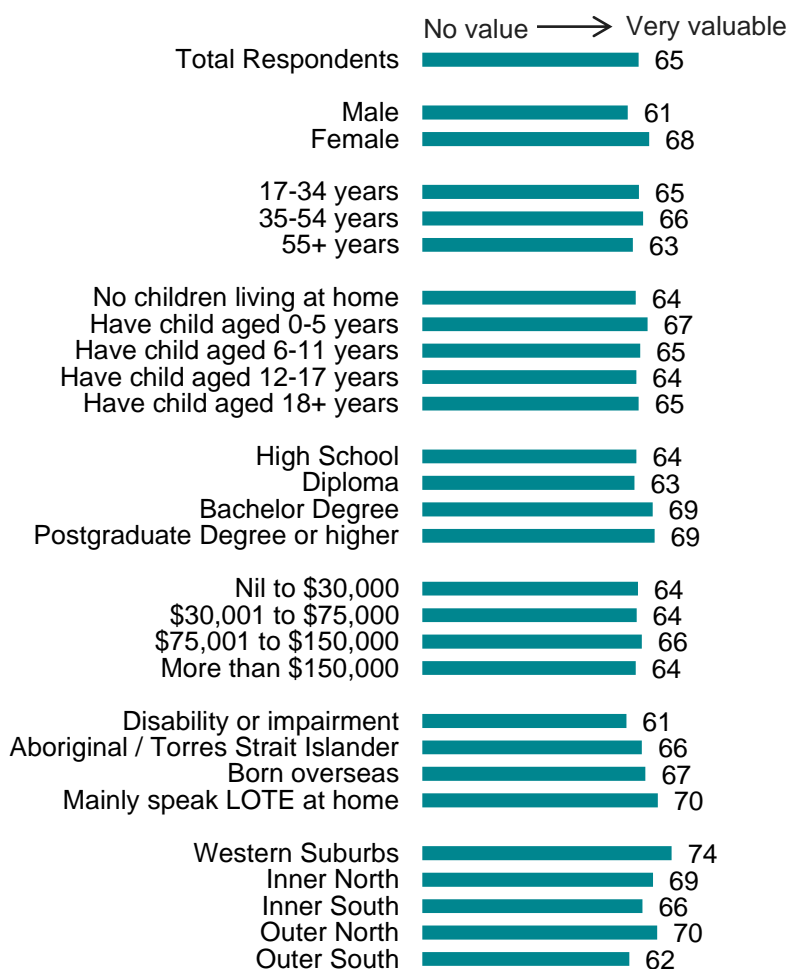


### 6.3 Community Variances

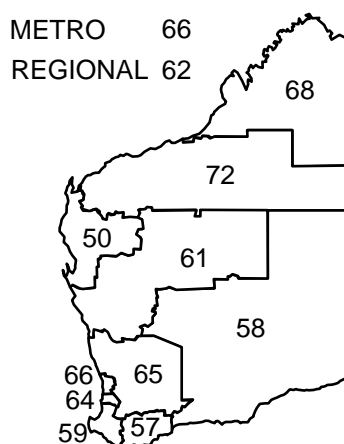
Perceived value is higher among people in the western suburbs and people who mainly speak a language other than English at home (see Figure 10). Perceived value is lowest among males and people with disability or impairment.

Across the regions, perceived value is higher in the Pilbara and Kimberly and lower in Gascoyne (see Map 4).

Figure 10: Community Variances  
Value Index Score



Map 4: Regional Variances  
Value Index Score



#### Q4b. How valuable is the role of arts and culture in your life?

Base: All respondents, excludes unsure (n = 1299) NB: 2% 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 78 out of 100.

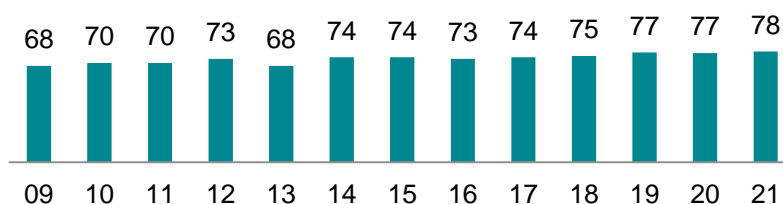
Figure 11: Overall Ratings  
% of respondents



### 7.2 Trend Analysis

At 78, the index score is at its highest to date, climbing up from 68 in 2013 (see Figure 12).

Figure 12: Trend Analysis  
Value Index Score

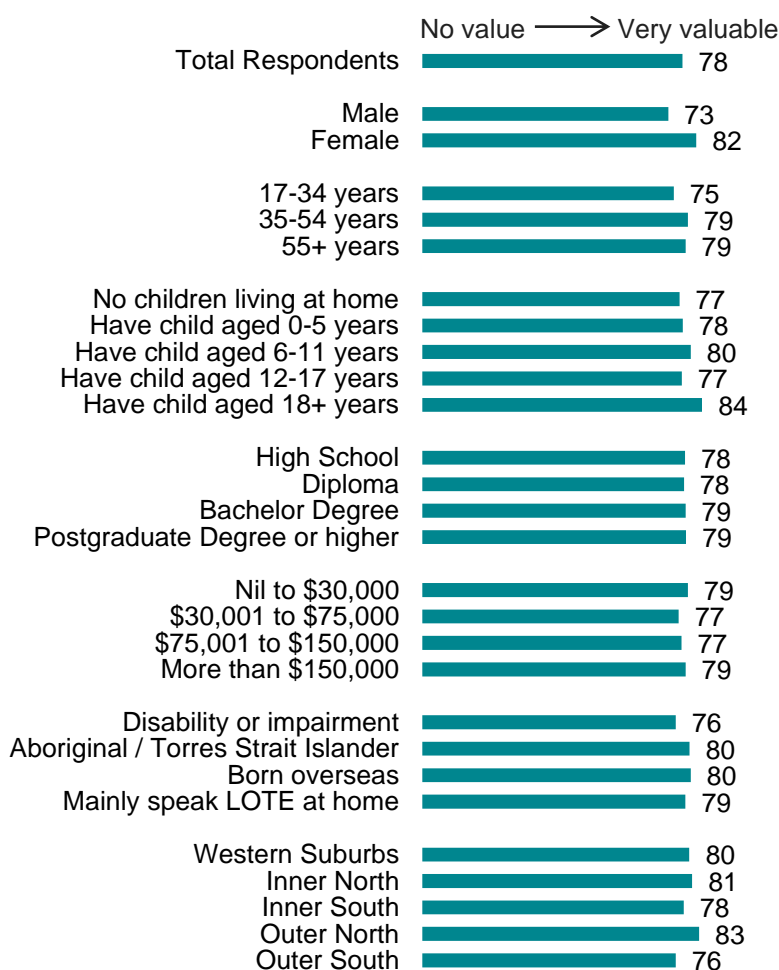


### 7.3 Community Variances

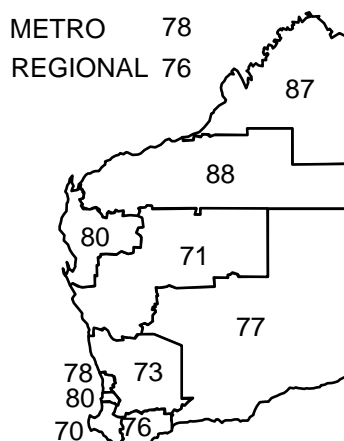
Community value is higher among females, people living in the other north suburbs of Perth and people with children aged 18 years or older (see Figure 13). Perceived value is lower among males.

Across the regions, perceived value is highest in the Kimberly and Pilbara. There is greatest room to improve perceived value in the South West (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 = 1303) NB: 2% of all respondents answered 'unsure'

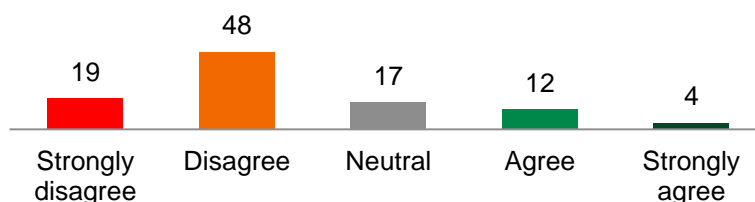
## 8 The arts only helps people who participate, not the broader community

### 8.1 Level of Agreement

Just 16% of respondents agree “the arts only helps those people who participate, not the broader community”. 67% disagree with the statement. These people think the arts does help the broader community (see Figure 14).

The mean score is 2.3 out of 5.0 and the Index Score is 33 out of 100.

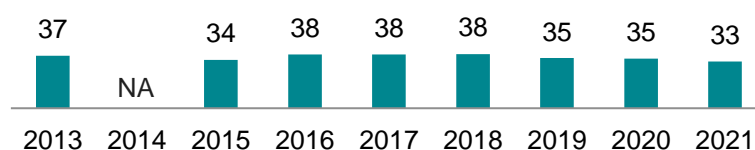
Figure 14: Overall Ratings  
% of respondents



### 8.2 Trend Analysis

The Agreement Index Score is the lowest score achieved to date. The score has fallen from 38 in 2018 (see Figure 15). More people are beginning to think that the arts does help the broader community.

Figure 15: Trend Analysis  
Agreement Index Score

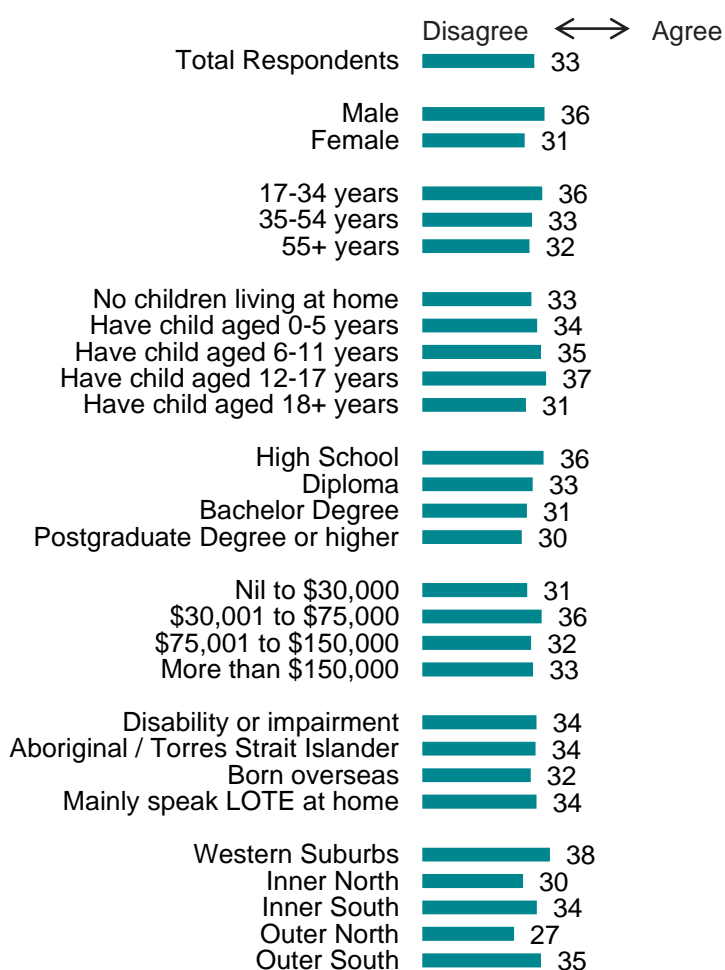


### 8.3 Community Variances

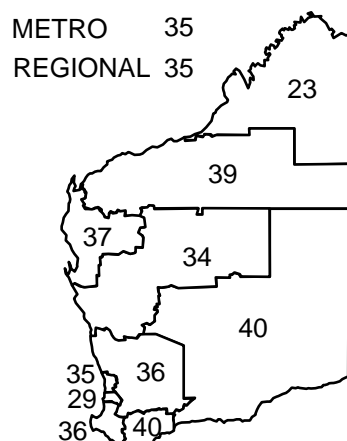
Level of agreement is fairly similar across the community. The greatest variances are by location. People in the inner and outer north suburbs are less likely to agree (see Figure 16); they are more likely to think the arts does help the broader community.

Across the regions, respondents in the Kimberley 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 = 1293) NB: 3% of all respondents answered 'unsure'

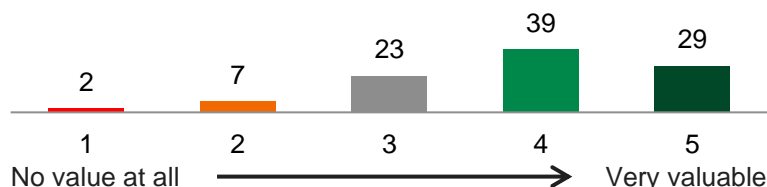
## 9 Value of arts and culture's contribution to creating a sense of community

### 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 3.9 out of 5.0 and the Index Score is 71 out of 100.

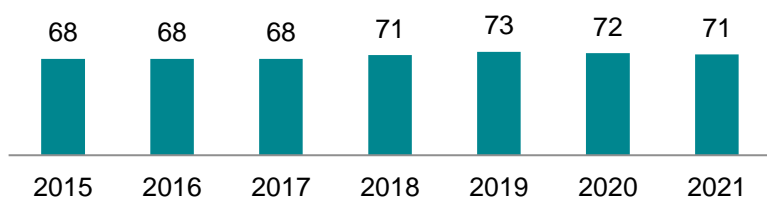
Figure 17: Overall Ratings  
% of respondents



### 9.2 Trend Analysis

The Value Index Score is similar to recent years (see Figure 18).

Figure 18: Trend Analysis  
Value Index Score

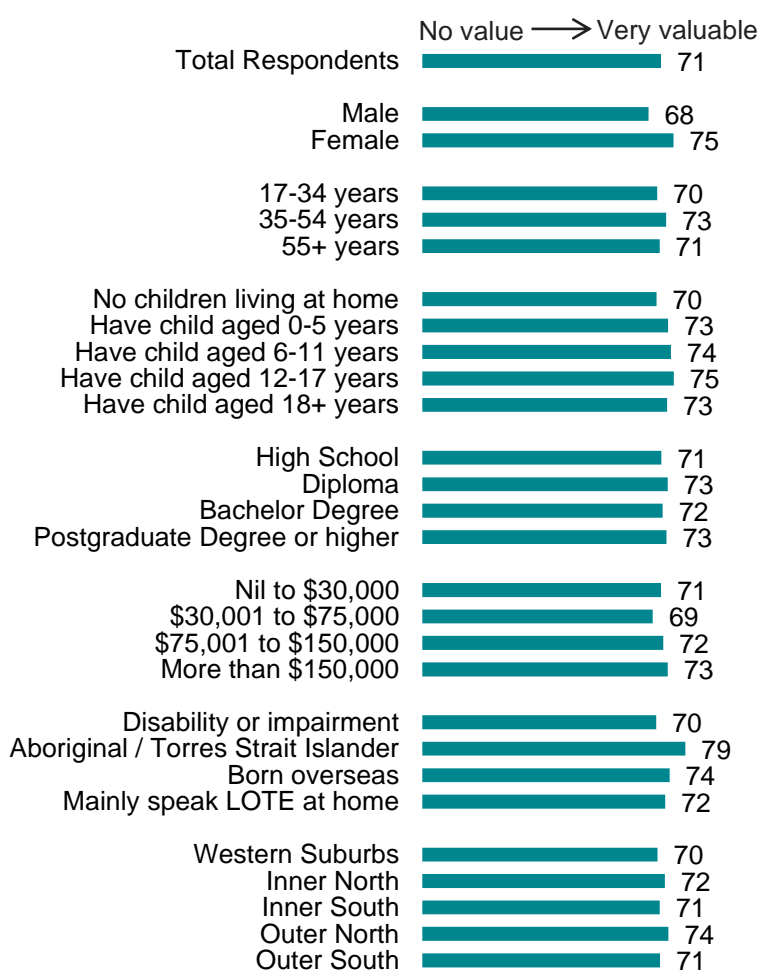


### 9.3 Community Variances

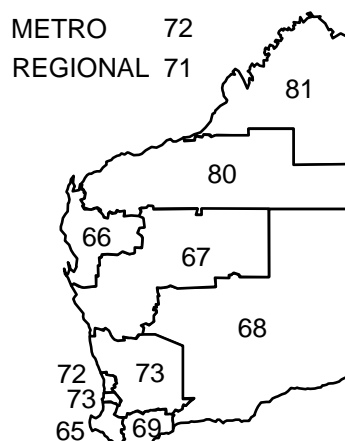
Perceived value is fairly consistent across the community. Females perceive more value than males. Perceived value is also higher among people with an Aboriginal or Torres Strait Islander background (see Figure 19).

Across the regions, perceived value is highest in the Kimberley and Pilbara (see map 7).

Figure 19: Community Variances  
Value Index Score



Map 7: Regional Variances  
Value Index Score



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

Base: All respondents, excludes unsure (n = 1272) NB: 4% of all respondents answered 'unsure'



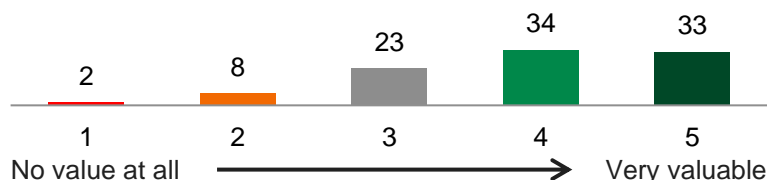
## 10 Value of arts and culture's contribution to creating a sense of identity

### 10.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to the identity of the state?' 67% of respondents rate value highly (see Figure 20).

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

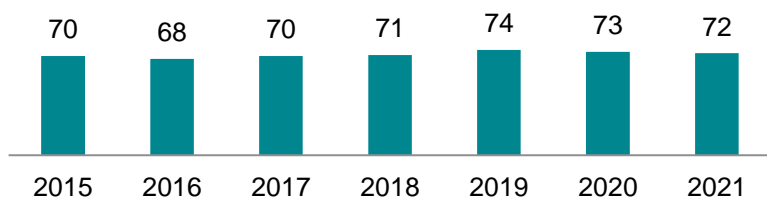
Figure 20: Overall Ratings  
% of respondents



### 10.2 Trend Analysis

The Value Index Score has remained fairly consistent over the years (see Figure 21).

Figure 21: Trend Analysis  
Value Index Score

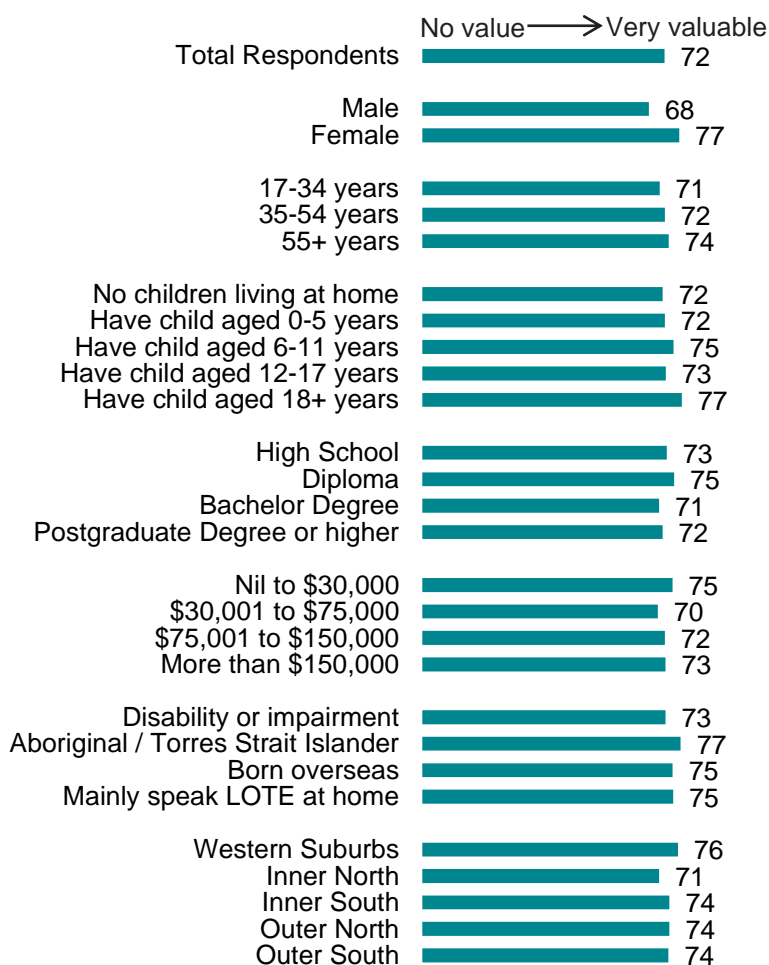


### 10.3 Community Variances

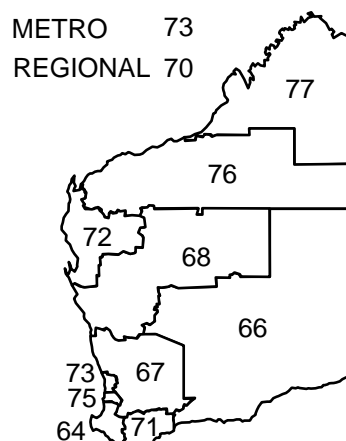
Perceived value is fairly consistent across the community. Females perceive more value than males (see Figure 22).

Across the regions, perceived value is highest in the Kimberly and Pilbara (see Map 8).

Figure 22: Community Variances  
Value Index Score



Map 8: Regional Variances  
Value Index Score



Q5b. How valuable is the contribution of arts and culture to the identity of the state?

Base: All respondents, excludes unsure (n = 1267) NB: 5% of all respondents answered 'unsure'



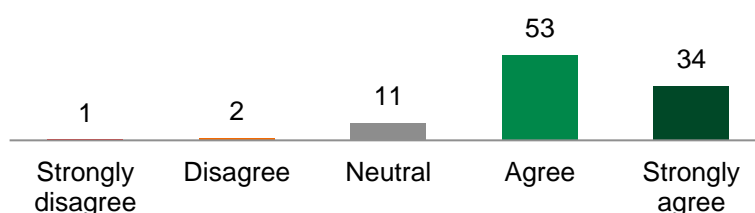
# 11 The arts make me feel good

## 11.1 Level of Agreement

87% of respondents agree or strongly agree with the statement “the arts make me feel good” (see Figure 23).

The mean score is 4.2 out of 5.0 and the Index Score is 79 out of 100.

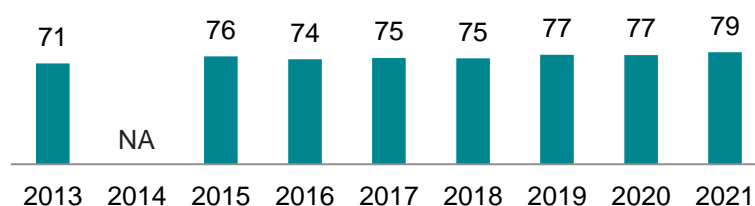
Figure 23: Overall Ratings  
% of respondents



## 11.2 Trend Analysis

At 79, the Agreement Index Score is up from 74 in 2016 and is the highest score achieved to date (see Figure 24).

Figure 24: Trend Analysis  
Agreement Index Score

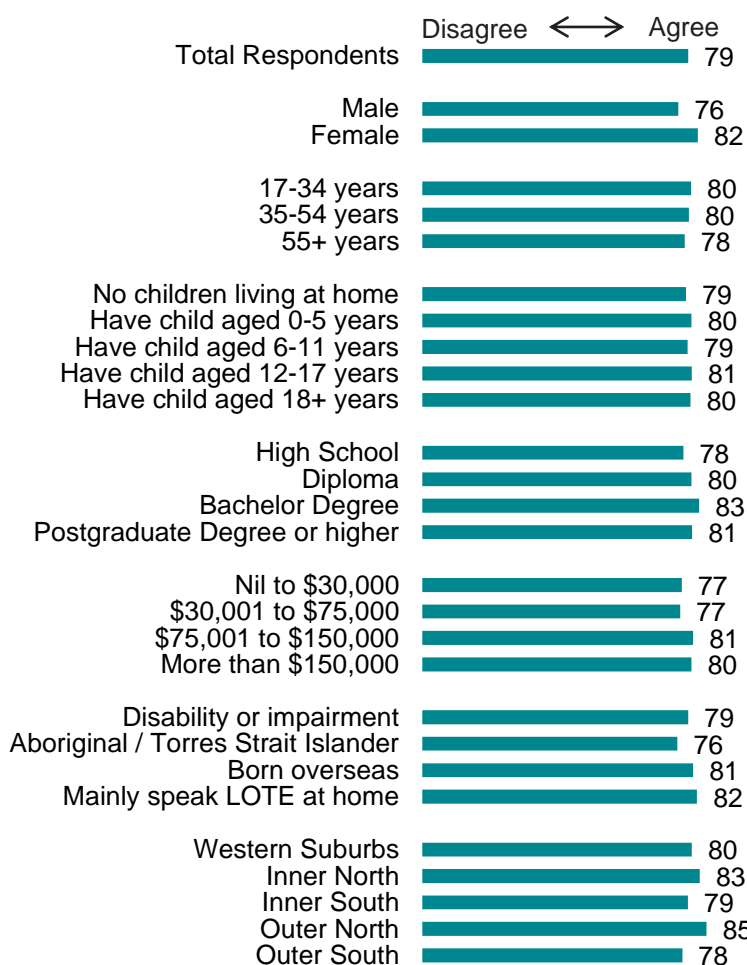


## 11.3 Community Variances

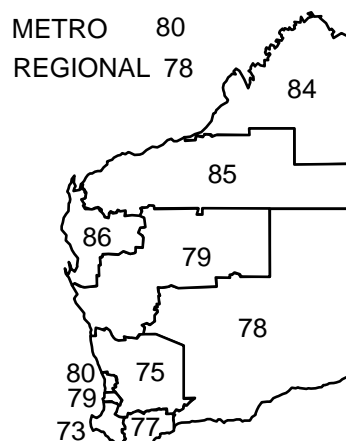
Level of agreement is fairly similar across the community. The arts makes females feel better than males (see Figure 25).

Across the regions, agreement is highest in the Gascoyne region and lowest in the South West (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 = 1314) NB: 1% of all respondents answered 'unsure'

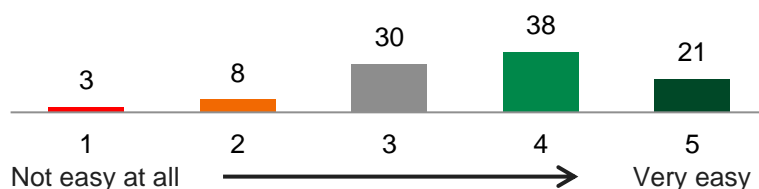
## 12 Ease of accessing or participating in arts and cultural activities in WA

### 12.1 Overall Ratings

58% of respondents believe it is easy to access or participate in arts and cultural activities in WA, giving a rating or 4 or 5 out of 5 (see Figure 26). A subtotal variance of  $\pm 1\%$  is explained by rounding to zero decimal places.

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

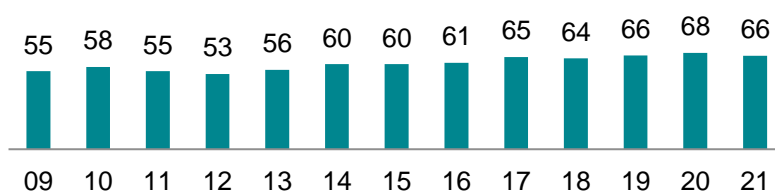
Figure 26: Overall Ratings  
% of respondents



### 12.2 Trend Analysis

At 66, the Ease of Access Index Score has dropped slightly from a high of 68 in 2020 but remains fairly consistent with recent years (see Figure 27).

Figure 27: Trend Analysis  
Ease of Access Index Score

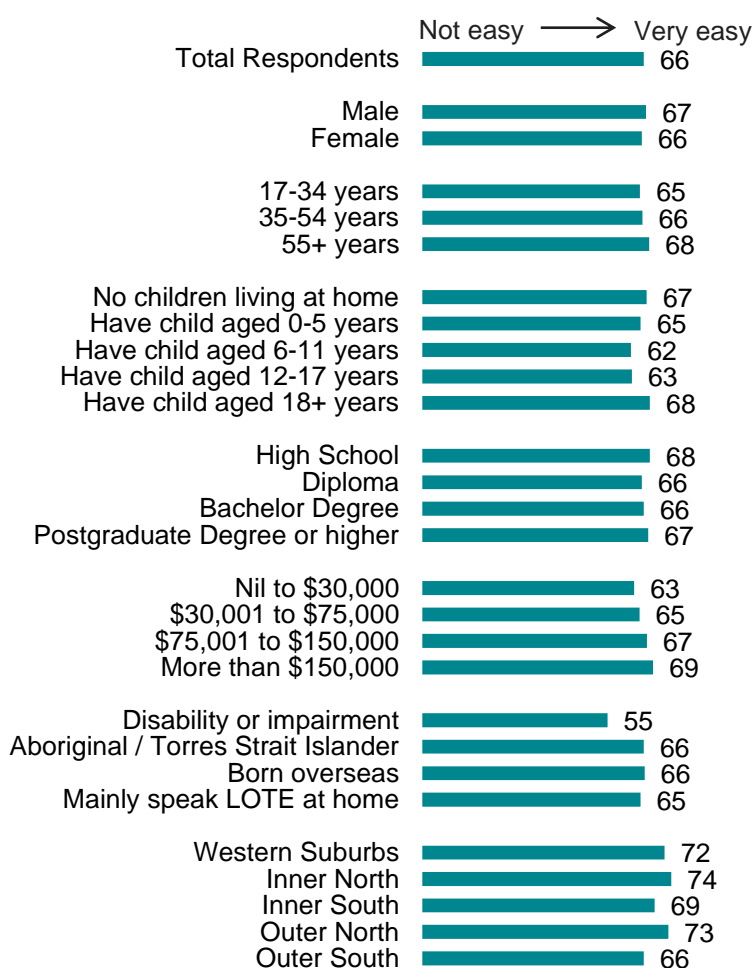


### 12.3 Community Variances

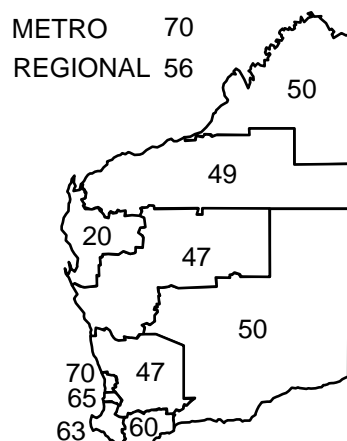
It is easier to access and participate in art and cultural activities in the Perth metropolitan area than it is in the regions. There is an access gap of 14 index points. It is particularly difficult to access art and culture in the Gascoyne (see Map 10).

It is also more difficult to access and participate in art and cultural activities for people with disability (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?

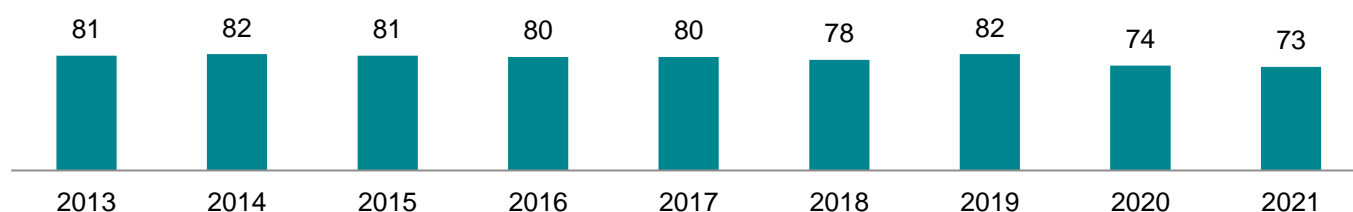
Base: All respondents, excludes unsure (n = 1235) NB: 7% of all respondents answered 'unsure'

## 13 Attendance and participation in arts and cultural activities in WA

### 13.1 Attendance and participation over the past 12 months

In 2021, 73% of respondents said they attended or participated in an arts or cultural activity in the past twelve months (see Figure 29). This is down from 82% in 2019; likely to have been impacted by COVID-19 restrictions. Survey participants had been informed that arts and cultural activities included a range of activities such as the cinema, music, theatre, dance, visual arts, opera, festivals, libraries, galleries, museums, archives and community cultural events.

Figure 29: **Attendance or participation in an arts and cultural activity in the past 12 months**  
% of respondents who attended or participated in past 12 months



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

Base: All respondents, excludes unsure (n=1280)

Please note variations in the questions from 2013 to 2019:

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

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

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

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

### 13.2 Community variances in attendance over the past 12 months

Attendance and participation in arts and culture activities varies across the population. It is higher among people with higher levels of education and income, and lower among older people and in the outer south suburbs of Perth (see Figure 30).

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

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

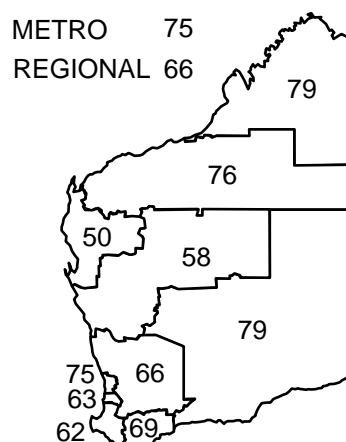
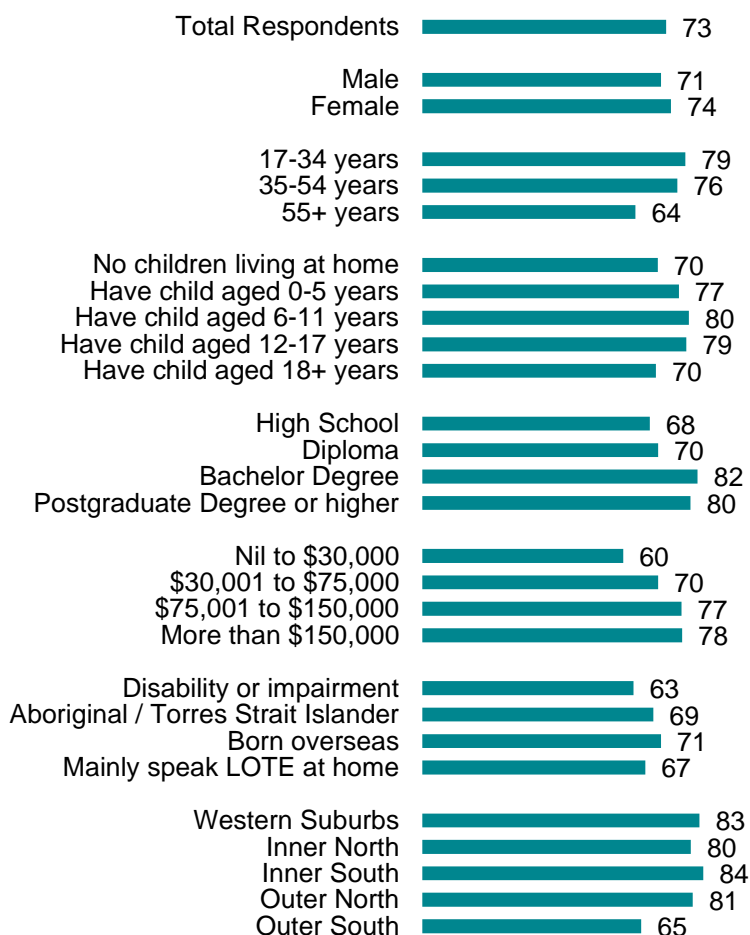


Figure 30: **Community Variances**

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









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

Participation in arts and culture over summer was 68%. This is down 3% points compared to last summer, and down from 82% attendance in 2019. Lower attendance is likely to be due to COVID-19 restrictions.

Over summer, 3% of respondents attended or participated in art and culture at least once a week, 9% had attended two or three times per month, 18% had attended once a month, 28% had attended one or two times over summer, and 9% had attended less often (see Figure 31). 32% 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**

% of respondents		2015	2016	2017	2018	2019	2020	2021	Trend
12+ times (around once a week or more often)	 3	11	5	5	5	7	7	3	▼
5-11 times (around 2 or 3 times a month)	 9	17	19	15	13	17	15	9	▼
3-4 times (around once a month)	 18	22	23	20	21	23	20	18	▼
1-2 times (around once every 2 to 3 months)	 28	23	23	26	27	25	24	39	▲
Less often	 9	-	-	9	9	10	6	9	=
Not at all	 32	-	-	25	26	18	29	32	▲

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

Base: All respondents, excludes unsure (n = 1283)




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

96% of respondents have attended an arts or cultural activity before. Most (84%) attended an arts or culture activity within the past two years. 4% have never attended an arts or cultural activity (see Figure 32).

Figure 32: **Attendance / participation in the arts**

% of respondents		2013	2014	2015	2016	2017	2018	2019	2020	2021	Trend
Within past 2 years	 84	86	89	87	91	87	85	85	83	84	=
Over 2 years ago	 12	12	11	13	9	13	15	8	11	12	▲
Never	 4							7	7	4	▼

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

Base: All respondents, excludes unsure (n = 1283)

Please note variations in the questions from 2013-2018 and 2019-2021 represented in Figure 32:

2019-2021 Q2a. When was the last time you attended or participated in an arts and cultural activity?

2013-2018 Q2a. How many times have you attended or participated in an arts and cultural activity over the past 2 years?

### 13.5 Community variances in attendance | summary

Frequent participation, where respondents attended activities at least once a month over summer, is more common in the Pilbara, north and western suburbs of Perth, and among those with higher levels of education and income (see Table 3). Non-attendance is most likely in the Mid-West.

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

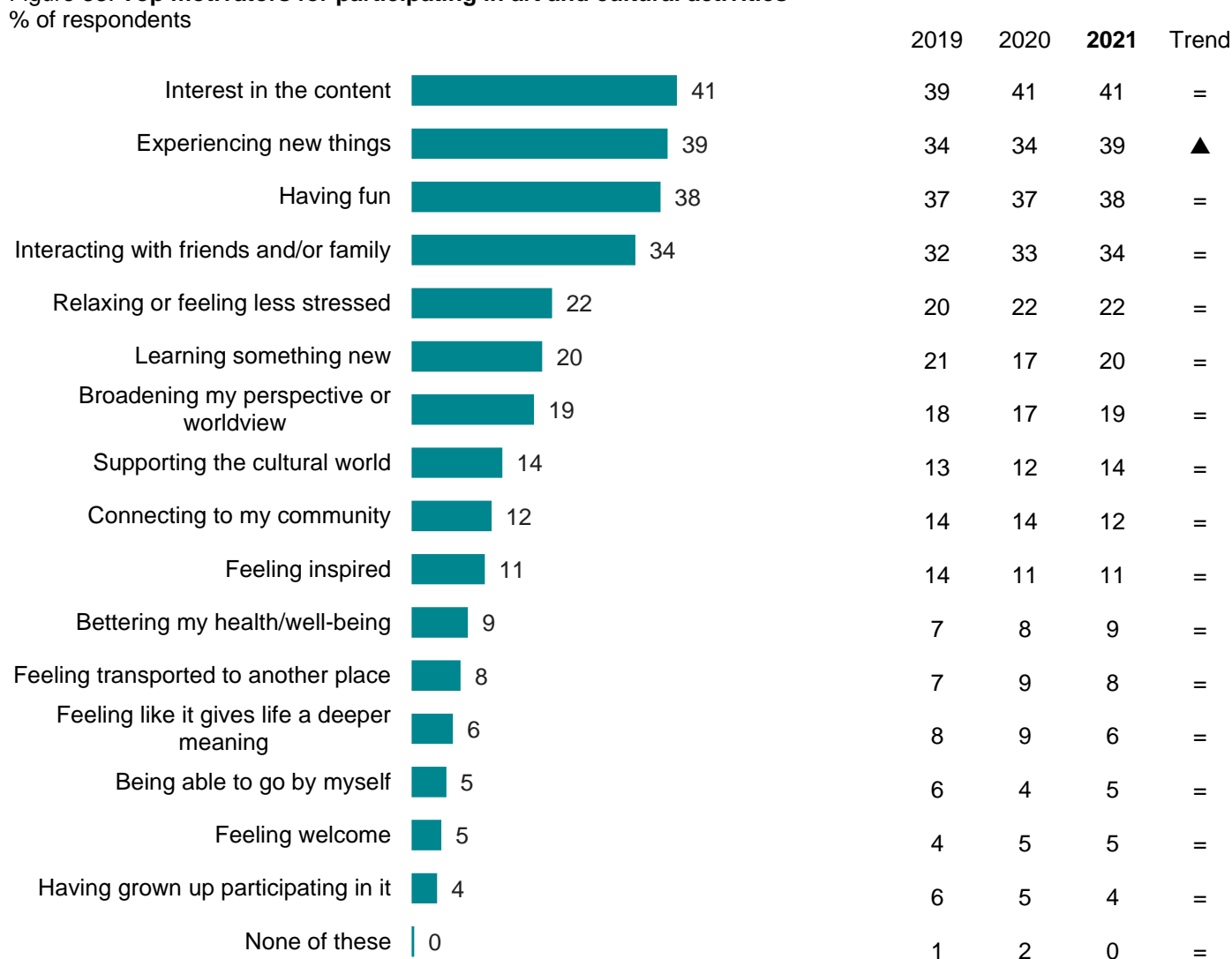
% of respondents	At least once a month over summer	At least once over summer	At least once in the past year	Have attended before	Never attended
Total respondents	31	59	72	96	4
Male	29	57	70	95	5
Female	32	60	74	97	3
17-34 years	33	63	78	97	3
35-54 years	31	62	75	97	3
55+ years	28	51	62	95	5
No children living at home	31	57	70	95	5
Have child aged 0-5	30	61	76	97	3
Have child aged 6-11	34	62	78	98	2
Have child aged 12-17	28	62	78	97	3
Have child aged 18+	24	53	68	96	4
High School	30	54	68	95	5
Diploma	23	54	70	98	2
Bachelor Degree	37	71	82	98	2
Postgraduate Degree or higher	42	70	80	98	2
Nil to \$30,000	21	40	61	95	5
\$30,001 to \$75,000	32	56	70	96	4
\$75,001 to \$150,000	28	63	76	97	3
More than \$150,000	39	68	77	98	2
Disability or impairment	25	44	60	94	6
Aboriginal / Torres Strait Islander	38	58	72	91	9
Born overseas	34	58	70	97	3
Mainly speak LOTE at home	29	53	65	95	5
Metro	32	62	74	97	3
Regional	26	49	67	93	7
Western Suburbs	43	60	79	100	0
Inner North	48	75	82	98	2
Inner South	27	67	82	98	2
Outer North	41	72	80	100	0
Outer South	25	49	64	96	4
Gascoyne	24	31	53	93	7
Goldfields-Esperance	32	52	78	93	7
Great Southern	27	59	70	96	4
Kimberley	19	62	75	93	7
Mid West	12	30	61	88	12
Peel	25	48	62	95	5
Perth	32	62	74	97	3
Pilbara	44	65	77	97	3
South West	28	50	61	92	8
Wheatbelt	13	36	69	95	5

## 14 Motivations for participating in arts and cultural activities

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

COVID-19 restrictions do not appear to have impacted motivations for participating in arts and cultural activities, with the possible exception of wanting to experience new things (up by 5% points).

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



**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 = 1228)

As shown in table 4 (overleaf), the top four motivators are similar across all groups. The stand out variances are that respondents in the Gascoyne region are much more likely to mention fun and interacting with friends and family.

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
Total respondents	41	39	38	34
Male	43	36	39	33
Female	39	42	37	36
17-34 years	38	42	43	39
35-54 years	39	36	42	36
55+ years	45	40	29	28
No children living at home	42	40	34	29
Have child aged 0-5	34	43	43	45
Have child aged 6-11	36	38	44	39
Have child aged 12-17	40	35	46	37
Have child aged 18+	42	39	37	34
High School	47	37	46	33
Diploma	40	42	34	31
Bachelor Degree	40	42	37	35
Postgraduate Degree or higher	37	34	40	33
Nil to \$30,000	41	41	27	27
\$30,001 to \$75,000	41	35	37	29
\$75,001 to \$150,000	38	40	38	40
More than \$150,000	47	44	40	37
Disability or impairment	40	37	33	28
Aboriginal / Torres Strait Islander	37	33	24	35
Born overseas	42	42	35	33
Mainly speak LOTE at home	27	32	37	36
Perth Metro	40	41	38	33
WA Regional	43	35	38	37
Western Suburbs	34	46	46	37
Inner North	38	40	35	31
Inner South	43	40	43	38
Outer North	42	32	32	27
Outer South	39	44	38	33
Gascoyne	14	13	60	74
Goldfields-Esperance	49	41	31	44
Great Southern	46	30	44	38
Kimberley	25	22	30	13
Mid West	38	37	31	21
Perth	40	41	38	33
Peel	36	36	41	34
Pilbara	46	39	44	56
South West	55	36	39	38
Wheatbelt	35	32	33	32

**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 = 1228)

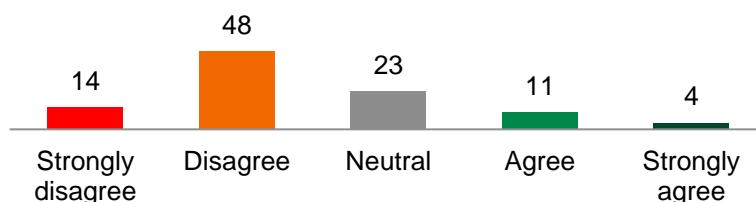
## 15 Few people agree that arts companies should rely on ticket sales alone

### 15.1 Level of Agreement

Only 15% of respondents agree that “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”. 62% 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.

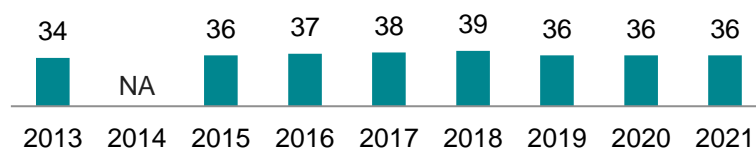
Figure 34: Overall Ratings  
% of respondents



### 15.2 Trend Analysis

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

Figure 35: Trend Analysis  
Agreement Index Score

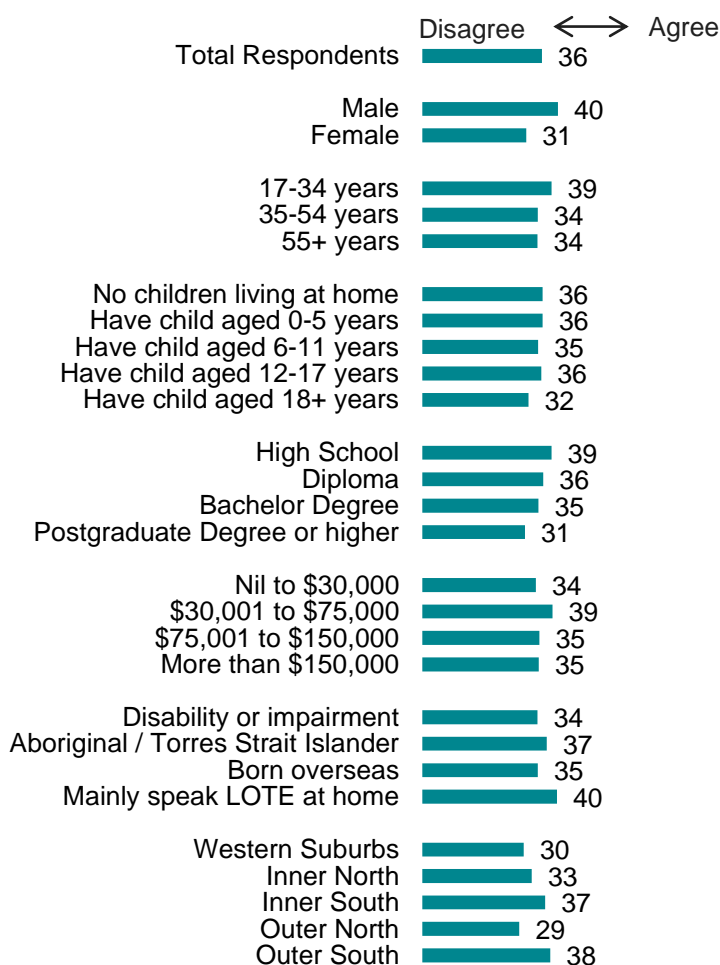


### 15.3 Community Variances

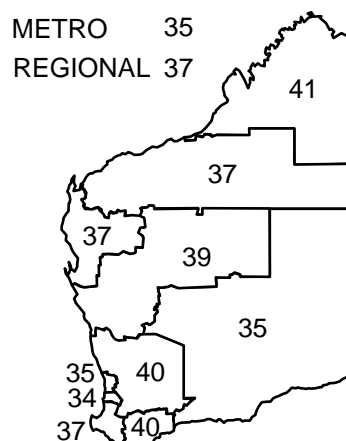
Level of agreement varies across the population. Females and those with higher levels of education are more likely to disagree that arts companies should rely on ticket sales alone (see Figure 36).

Across the regions, respondents from Perth, Peel and the Goldfields-Esperance are least 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 = 1260) NB: 5% of all respondents answered 'unsure'



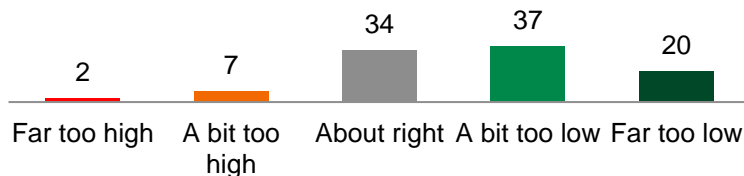
## 16 Perceptions of WA Government's allocation of just under \$2.21 per person per week for arts and cultural activities, services & facilities

### 16.1 Level of Agreement

When asked whether \$2.21 per person per week in allocation by WA Government for arts and cultural activities was too low, about right or too high, 57% thought it was too low (see Figure 37).

The mean score was 3.7 out of 5.0 and the Index Score was 66.

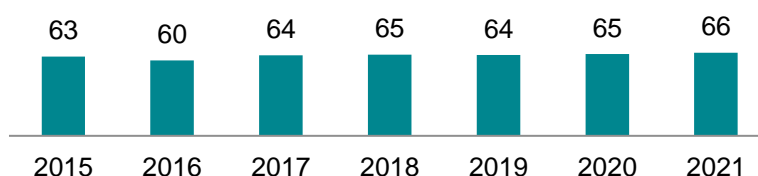
Figure 37: Overall Ratings  
% of respondents



### 16.2 Trend Analysis

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

Figure 38: Trend Analysis\*  
Funding Allocation Index Score



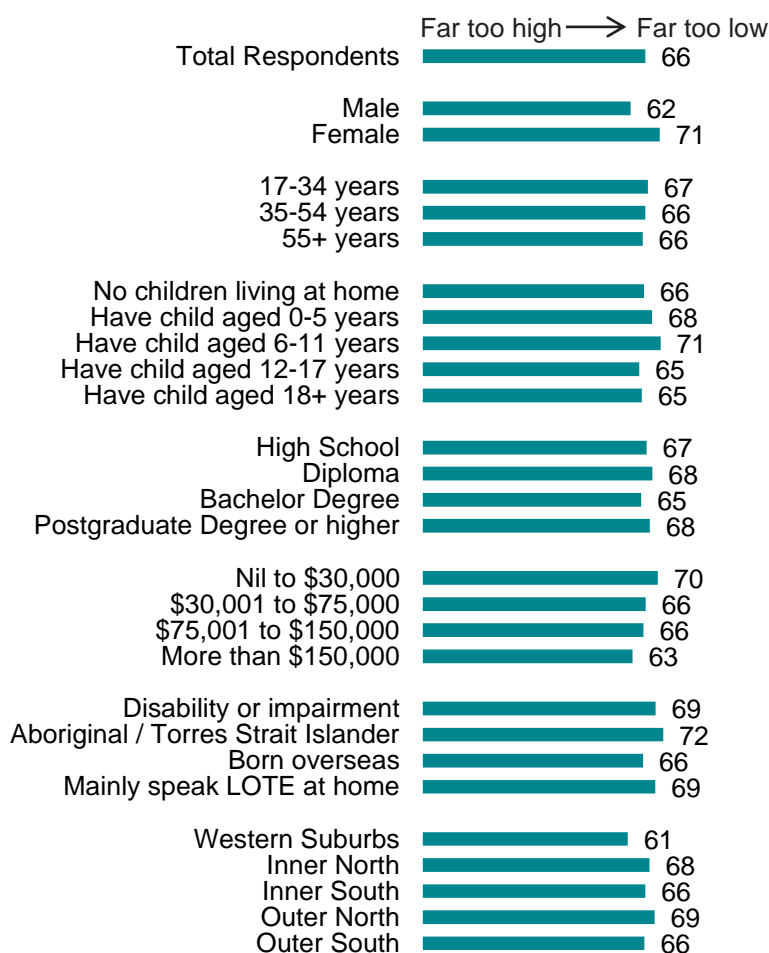
\*Please note: 2015 and 2016 were based on a \$1 figure (calculated on "Arts" activities alone) compared with around \$2 per week spending for 2017 and 2018 and \$2.21 per week spending in 2019 to 2021 (calculated on "Arts and Cultural" activities).

### 16.3 Community Variances

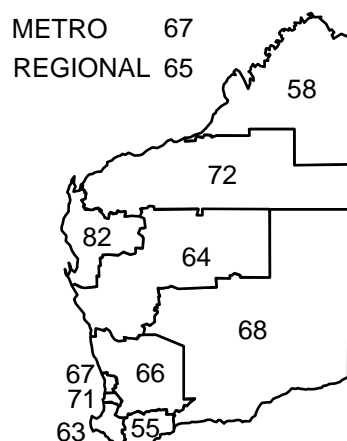
Females, those with primary school aged children, on lower incomes and people with an Aboriginal or Torres Strait Islander background are more likely to feel that \$2.21 per person per week in arts allocation is too low (see Figure 39).

Across the regions, respondents in the Gascoyne are most likely to feel that \$2.21 per person per week is too low while the Great Southern and Kimberly they generally feel it is about right (see Map 13).

Figure 39: Community Variances  
Funding Allocation Index Score



Map 13: Regional Variances  
Funding Allocation Index Score



Q6a<sup>1</sup>. About \$2.21 per person per week is allocated by WA Government for arts and cultural activities, services and facilities in WA. Do you consider this amount to be too low, about right or too high?

Base: All respondents, excludes unsure (n = 1104) NB: 17% of all respondents answered 'unsure'

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

## 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 80%. The percentage of people willing to pay up to \$2 more per week has increased from 31% to 35% over the past 12 months. Consistent with recent years, 40% of respondents would be willing to pay between \$2 and \$10 more, and 6% would be willing to pay over \$10 per week more (see Figure 40). 20% say they would not be willing to pay any more.

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

% of respondents	2015*	2016*	2017	2018	2019	2020	2021	Trend
Not willing to pay any more	25	29	28	27	23	24	20	▼
Willing to pay \$0.01 to \$2 more per week	44	46	32	33	32	31	35	▲
Willing to pay \$2.01 to \$10 more per week	29	24	36	37	40	39	40	=
Willing to pay over \$10 more per week	2	1	4	3	4	6	6	=

Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA?

Base: All respondents, excludes unsure (n = 1092) NB: 18% of all respondents answered 'unsure'

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

Respondents in the Kimberley, Peel and with disability are most willing to pay over \$10 more.

The results indicate that views are somewhat polarised among respondents of Aboriginal and Torres Strait Islander background. While a greater proportion are willing to pay \$2.01 to \$10 more per week, they are also most likely to say that they are not willing to pay anymore (see Table 5).

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

% of respondents	None	\$0.01-\$2 more	\$2.01-\$10 more	Over \$10 more
Total respondents	20	35	40	6
Male	25	36	35	4
Female	14	34	45	7
17-34 years	16	39	39	6
35-54 years	19	33	42	6
55+ years	23	33	39	4
No children living at home	19	38	39	5
Have child aged 0-5	20	32	42	6
Have child aged 6-11	19	32	43	6
Have child aged 12-17	21	31	46	2
Have child aged 18+	21	25	44	9
High School	19	34	41	6
Diploma	17	36	41	6
Bachelor Degree	15	36	44	5
Postgraduate Degree or higher	16	33	43	7
Nil to \$30,000	21	37	35	8
\$30,001 to \$75,000	22	36	39	4
\$75,001 to \$150,000	18	34	42	6
More than \$150,000	21	37	39	3
Disability or impairment	28	25	37	11
Aboriginal / Torres Strait Islander	32	11	50	7
Born overseas	15	41	37	7
Mainly speak LOTE at home	16	35	40	8
Metro	19	33	42	6
Regional	21	39	35	5
Western Suburbs	8	62	30	0
Inner North	18	37	36	9
Inner South	18	32	47	3
Outer North	11	34	50	5
Outer South	23	30	40	6
Gascoyne	23	23	44	9
Goldfields-Esperance	19	42	39	0
Great Southern	32	40	24	3
Kimberley	11	44	34	11
Mid West	20	53	23	3
Peel	15	43	32	10
Perth	19	33	42	6
Pilbara	6	33	60	2
South West	32	29	36	3
Wheatbelt	16	45	32	7

**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 = 1092) NB: 18% of all respondents answered 'unsure'

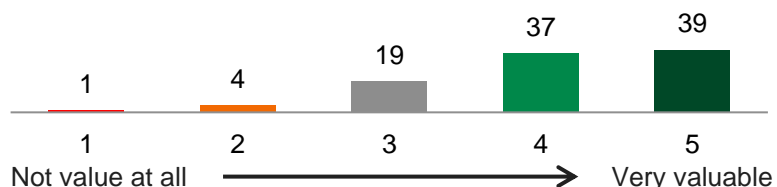
## 18 Value of WA film and television industry

### 18.1 Overall Ratings

When asked 'how valuable do you think the WA film and television industry is to the community', 75% rate value highly (see Figure 41). A subtotal variance of  $\pm 1\%$  is explained by rounding to zero decimal places.

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

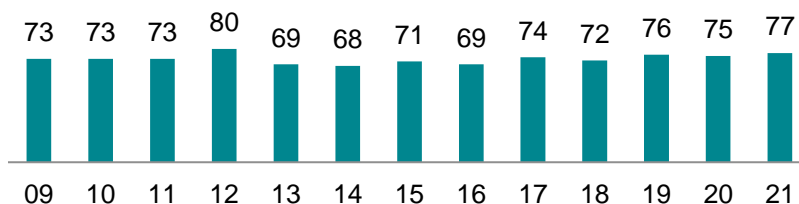
Figure 41: Overall Ratings  
% of respondents



### 18.2 Trend Analysis

At 77, the Value Index Score has remained fairly steady over the past three years (see Figure 42).

Figure 42: Trend Analysis  
Value Index Score

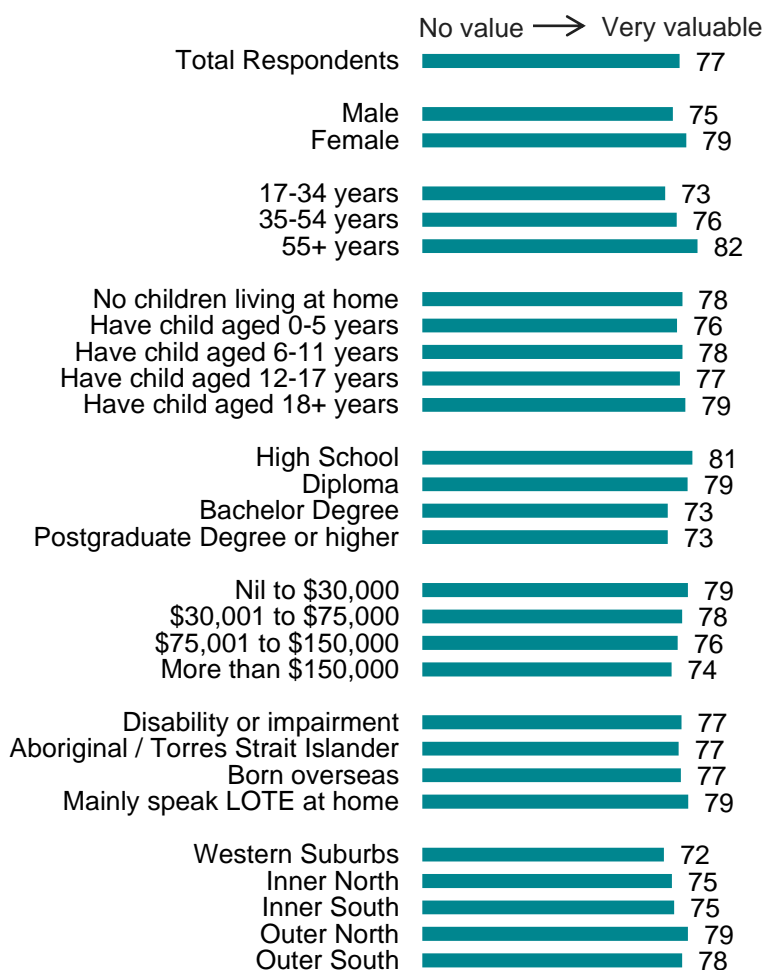


### 18.3 Community Variances

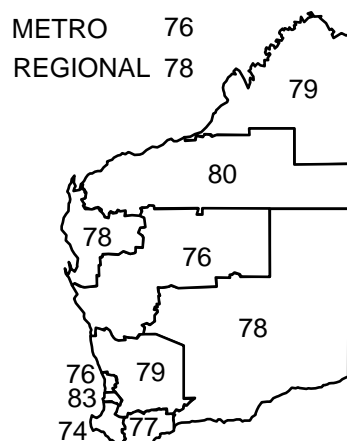
Perceptions of value vary across the community. Perceived value is higher among older respondents, and those with lower levels of education and income (see Figure 43).

Across the regions, perceived value is highest in the Peel region and lowest in the South 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 = 1278) NB: 4% of all respondents answered 'unsure'

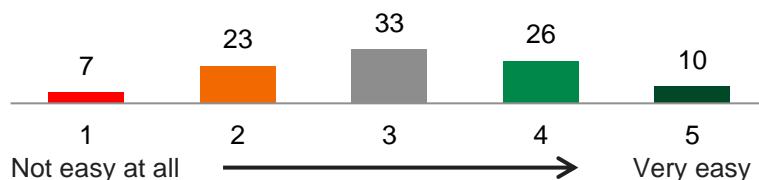
## 19 Accessibility of WA film and television productions

### 19.1 Overall Ratings

When asked “how easy is it for you to access Western Australian produced film and television productions?” 37% rated ease of access highly (see Figure 44). A subtotal variance of  $\pm 1\%$  is explained by rounding to zero decimal places.

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

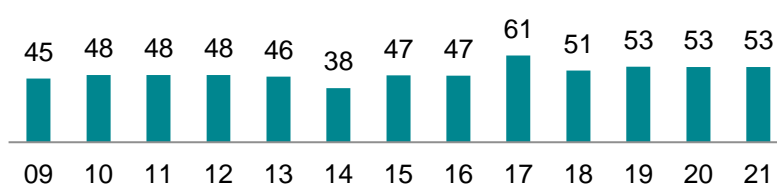
Figure 44: Overall Ratings  
% of respondents



### 19.2 Trend Analysis

The Ease of Access Index Score has remained steady over the past three years (see Figure 45). 2017 was the most successful year with a score of 61.

Figure 45: Trend Analysis  
Ease of Access Index Score

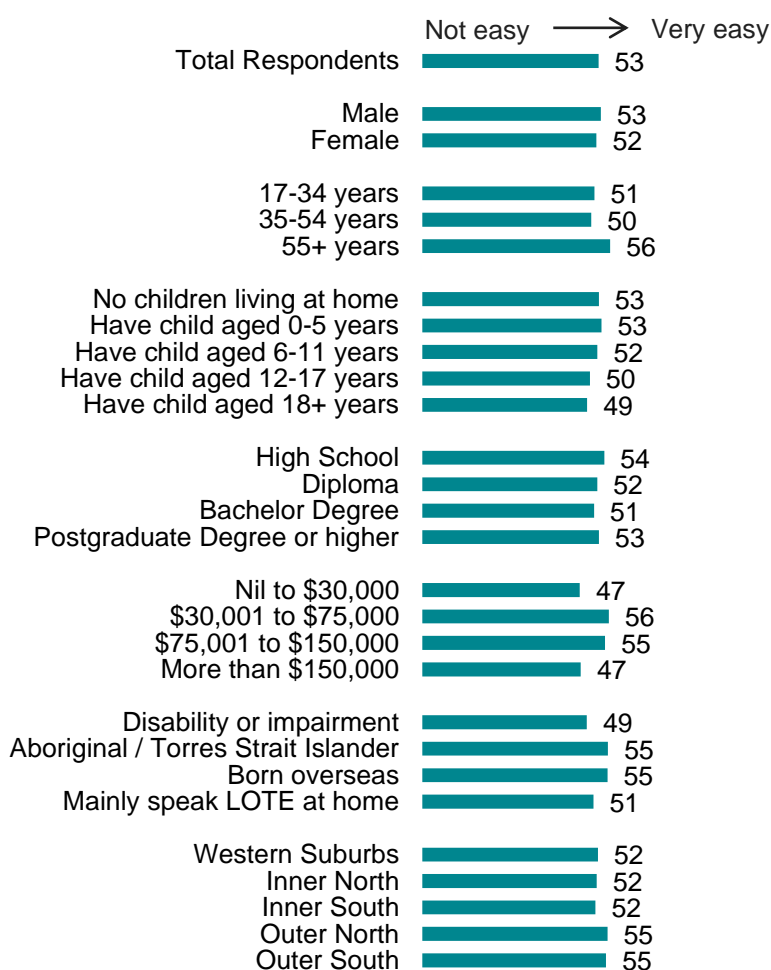


### 19.3 Community Variances

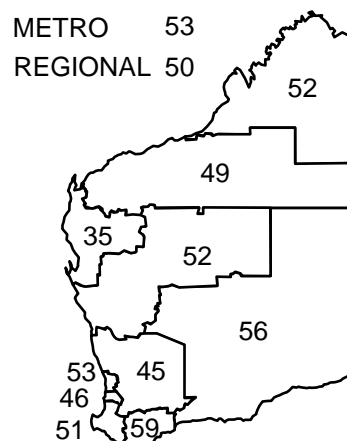
Ease of access is fairly consistent across the community. It is slightly higher among seniors. It is slightly lower among higher and lower income earners (see Figure 46).

Across the regions, ease of access is highest in Great Southern and Kalgoorlie-Esperance. It is lowest in the Gascoyne. (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 = 1136) NB: 14% of all respondents answered 'unsure'

## 20 Missed arts and culture activities during COVID-19 restrictions

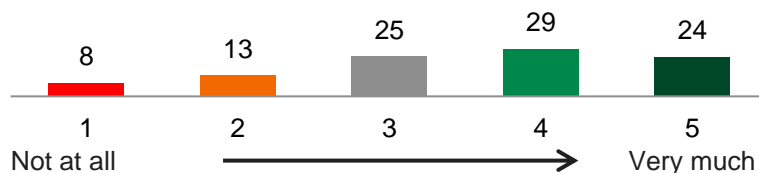
### Overall Ratings

Since March 2020, COVID-19 restrictions have impacted on 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?”, 54% indicated they missed being able to attend arts and culture activities quite a lot, giving a rating of 4 or 5 out of 5 (see Figure 44).

The mean score is 3.5 out of 5.0 and the Index Score is 62 out of 100.

Figure 44: Overall Ratings  
% of respondents



### 20.1 Community Variances

The degree to which attending arts and culture activities was missed was felt differently across the community. Art and culture activities were missed the most by respondents living in the western and outer north suburbs of Perth, by females and those on higher incomes (see Figure 46).

Across the regions, respondents in the Gascoyne missed attending arts and culture activities the least (see Map 15).

Map 15: Regional Variances  
Ease of Access Index Score

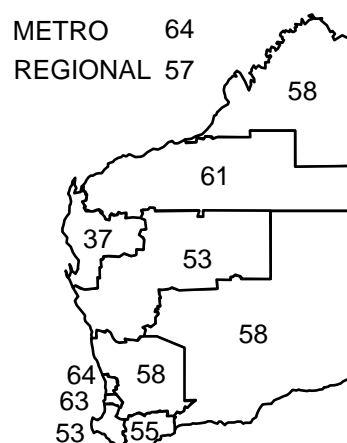
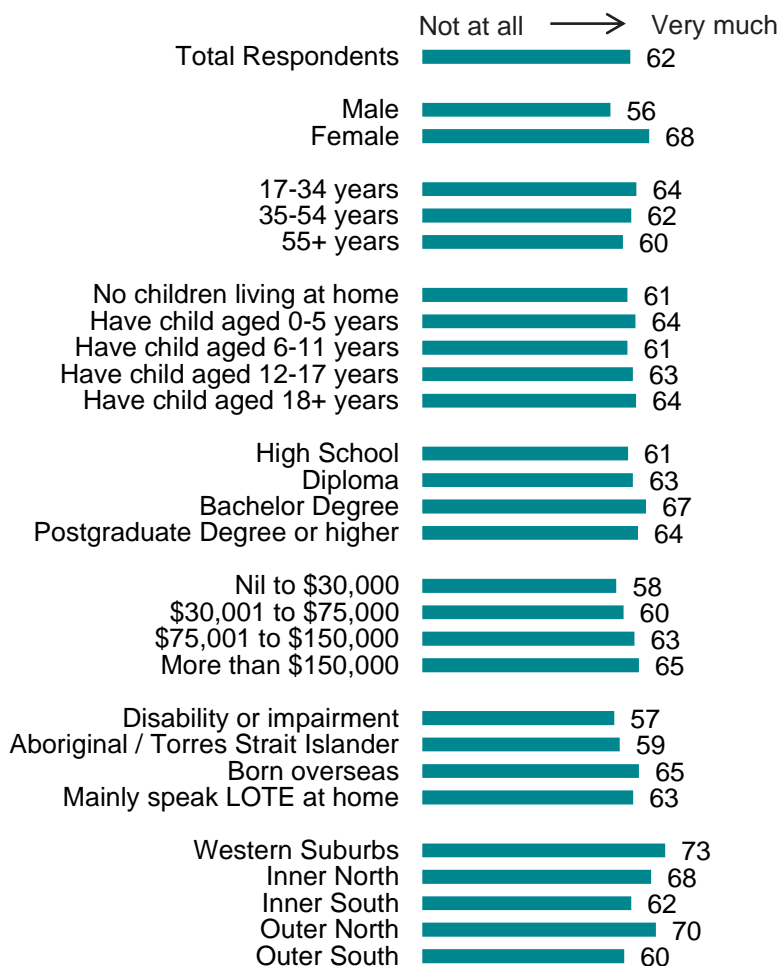


Figure 47: Community Variances  
Missed Arts and Culture Activities Index Score



Q8. Since March 2020, COVID-19 restrictions impacted opportunities to attend or participate in arts and culture activities. During this time, to what degree did you miss being able to attend or participate in arts and culture activities? Base: All respondents, excludes unsure (n = 1285) 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.
- 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 \$2.21 per person, per week is allocated by WA Government for arts and cultural activities, services and facilities in WA. Do you consider this amount to be: Far too high; A bit too high; About right; A bit too low; Far too low; or, Unsure
- Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA? Nothing; \$0.01 - \$1.00; \$1.01 - \$2.00; \$2.01 - \$5.00; \$5.01 - \$10.00; \$10.01 - \$20.00; \$20.01 +; Unsure
- Q7a. The West Australian Government, through Screenwest, provides financial support to help individuals and companies make film, television and digital media in Western Australia. How valuable do you think the Western Australian film and television industry is to the community? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".

- Q7b. How easy is it for you to access Western Australian produced film and television productions? Please use a scale of 1 to 5, where '1' is "not easy at all" and '5' is "very easy".
- Q8. Since March 2020, COVID-19 restrictions impacted opportunities to attend or participate in arts and culture activities. During this time, to what degree did you miss being able to attend or participate in arts and culture activities? 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