



PATTERNMAKERS



NOVEMBER 2021

Western Australia Snapshot

Audience Outlook Monitor



Department of
Local Government, Sport
and Cultural Industries

Summary

WA audiences are attending in high numbers, but confidence may fluctuate as conditions change in early 2022

- ▶ Data from 827 past attendees of Western Australia (WA) arts organisations suggests that the state's currently high confidence levels will be changing as we approach 2022.
- ▶ Around 8 in 10 (79%) of WA audiences are attending cultural events and 82% are ready to attend now or as soon as permitted. Almost 9 in 10 (86%) recently made firm plans to attend a cultural event in the future.
- ▶ However, these plans are more likely to be in the short-term, and many audience members are conscious that relaxed border restrictions could lead to a rise in cases – with WA expecting its first reopening milestone in late January 2022.
- ▶ Arts audiences are getting vaccinated at a faster rate than the state-wide population, reaching 92% fully vaccinated in November – with 2% already receiving booster shots.
- ▶ Unlike the outbreak-affected states of New South Wales, Victoria, and the Australian Capital Territory, which have had more time to grow used to 'living with the virus', some WA audiences are anxious about the prospect of widespread community circulation and news of new variants.
- ▶ When presented with a 'COVID-normal' scenario of 90%+ vaccination coverage and open borders, WA audiences indicated that comfort levels could fall for venues like museums and galleries (-26%), outdoor events (-19%) and comedy clubs and live music venues (-11%) – suggesting that COVID-safety could have a major role to play in mitigating discomfort in this 'new normal'.

COVID-safety will be critical for maintaining confidence as WA opens its borders

- ▶ Compared to the mid-year results (July 2021), WA audiences are less likely to be deterred from attending cultural events in future by the risk of lockdowns (37%, down from 47%) and more likely to be concerned with risks of transmission (49%, up from 28%).
- ▶ The results confirm that COVID-safety measures will play a pivotal role in stabilising confidence as WA opens its borders and the country faces the prospect of new variants, especially at indoor venues.
- ▶ Most arts audiences are likely to be in favour of vaccine passport policies for arts venues – with 73% encouraged by proof of vaccine requirements and only 9% discouraged.

- ▶ In fact, some audiences say these measures would need to be in place for them to consider attending. Significant proportions won't attend cultural spaces unless proof of vaccination is required, including large theatres and concert halls (40%) and outdoor events (34%).
- ▶ With masks currently not required at indoor venues, WA audiences continue to be polarised on this issue. 4 in 10 (38%) are encouraged by requiring audiences over 12 to wear masks, but 31% find this measure discouraging – the highest proportion in the country.
- ▶ While very few (11%) say masks would be absolutely necessary to attend an indoor venue at the moment, many expect their comfort levels to change once borders open to interstate or international travellers – with some looking towards 'step-up' measures such as mask mandates to build their confidence.

Audiences are 'looking local' to support the recovery effort — with events close to home seen as a low-risk way to enjoy the arts

- ▶ The outlook for loyalty programs is mostly positive, with 40% of WA audiences indicating they are at least somewhat likely to purchase a subscription or membership in 2022. There are 4 in 10 (43%) respondents that say they are unlikely – with some citing the uncertainty of reopening and planning for events.
- ▶ As people weigh up the risks of attending amid further uncertainty, 79% of WA audiences agree that they'll be attracted to events in their local area over the next year.
- ▶ An increasing number of audiences say they will be interested in 'light-hearted programs' (40%, up from 32% in July) – with some seeking escapism and uplift after the cumulative impacts of the pandemic.

WA audiences are increasingly likely to see online arts and culture playing a long-term role in their lives

- ▶ After several quarters of slight declines in online participation rates, digital engagement has been stable for WA audiences – at 40% in July 2021 and November 2021.
- ▶ Participation in most activities has been fairly consistent, such as watching pre-recorded video (19%, compared to 22% in July), live-streamed video (14%, stable with 12%) and virtual exhibitions (5%, stable with 7%). Participation in online courses continues to be the second-most popular digital activity, with 19% participating (stable with 17% in July).
- ▶ Despite some reports of 'screen fatigue', overall WA audiences are now more likely to see an ongoing role for digital arts experiences in their lives (69%), compared to July 2021 (49%).

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- ▶ Overall, those who are participating online are more likely to be paying for these experiences, including purchasing a single, pay-per-view experience (11%, up from 8%), making a donation for something seen online (13%, up from 10%), subscribing to a platform for on-demand content (10%, up from 4%) or subscribing to a program/season including digital offerings (8%, up from 5%).
 - ▶ Audiences can be divided into three groups for the purposes of marketing digital arts experiences: ‘digital devotees,’ the 22% of audiences who see a substantial role for digital in their lives, ‘selective but supportive’ audiences, the 47% who see a small role, and ‘tired of tech’ audiences, the 31% of audiences who see no role at all outside of lockdown.
 - ▶ Many audiences support hybrid models that offer greater flexibility and accessibility as we transition to a ‘COVID-normal’ Australia. When asked if they would attend a digital program in place of a cancelled live event, 1 in 3 WA audiences (30%) said they would be likely to attend.
 - ▶ It is clear that digital marketing and online experiences are playing a key role in keeping audiences engaged with arts organisations as uncertainty continues.

Introduction

This report summarises insights from over 800 audience members in Western Australia

This Western Australia (WA) Snapshot Report outlines key findings from the November 2021 phase of the Audience Outlook Monitor in Australia (Phase 6), based on data collected from 827 respondents. These respondents are audience members of arts and cultural organisations in Western Australia (referred to as ‘arts audiences’ in this report).

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 over 100 arts and culture organisations, including museums, galleries, performing arts organisations and festivals.

On 3 November 2021, participating organisations simultaneously sent the Phase 6 survey to a random sample of their audience – defined as those who had attended an arts or cultural event in person since January 2018. This data provides excellent visibility of trends across the country, noting that results for the Northern Territory (NT) and Tasmania (TAS) are not reported separately due to small sample sizes.

This report compares new results with data collected previously in July 2021 (Phase 5) and October 2021 (Pulse Check), to examine how things are changing over time.

In addition to this Snapshot Report, the November 2021 results are accessible in a free interactive dashboard. Users can explore the data for 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.

Audiences in outbreak-affected states/territories are reported separately to the rest of Australia

At the time of data collection (3–7 November 2021), outbreak conditions varied significantly by jurisdiction: New South Wales (NSW), Victoria (VIC) and Australian Capital Territory (ACT) were transitioning out of extended lockdowns, while in the rest of the country, audiences were enjoying minimal restrictions.

The three outbreak-affected states/territories of NSW, VIC and ACT (referred to in this report as ‘**outbreak-affected states**’) share similar trends – and are grouped together, where relevant, for reporting purposes. It should be noted that ACT audiences tend to be slightly less tolerant of risks than audiences in NSW and VIC.

States/territories across the ‘rest of Australia/rest of the country’ – Queensland (QLD), South Australia (SA), WA, NT and TAS – also share many similarities, with border closures helping to suppress the virus and minimise risks for audiences. These jurisdictions are also grouped together in places – noting that confidence levels in WA tend to be higher than in SA and QLD, where border restrictions were beginning to lift at the time of publication.

Read on for the key November 2021 findings in WA.

Current conditions

Vaccination rates among arts audiences in WA continue to climb, with 92% fully vaccinated

As of 7 November 2021, 92% of WA arts audiences say they are now fully vaccinated (up from 79% in October) with another 3% partially vaccinated (down from 10%) – as shown in Figure 1. Among those fully vaccinated, 2% have had a booster shot.

The proportion fully vaccinated has increased significantly since July 2021, when 21% of audiences were fully vaccinated and 50% had received their first dose.

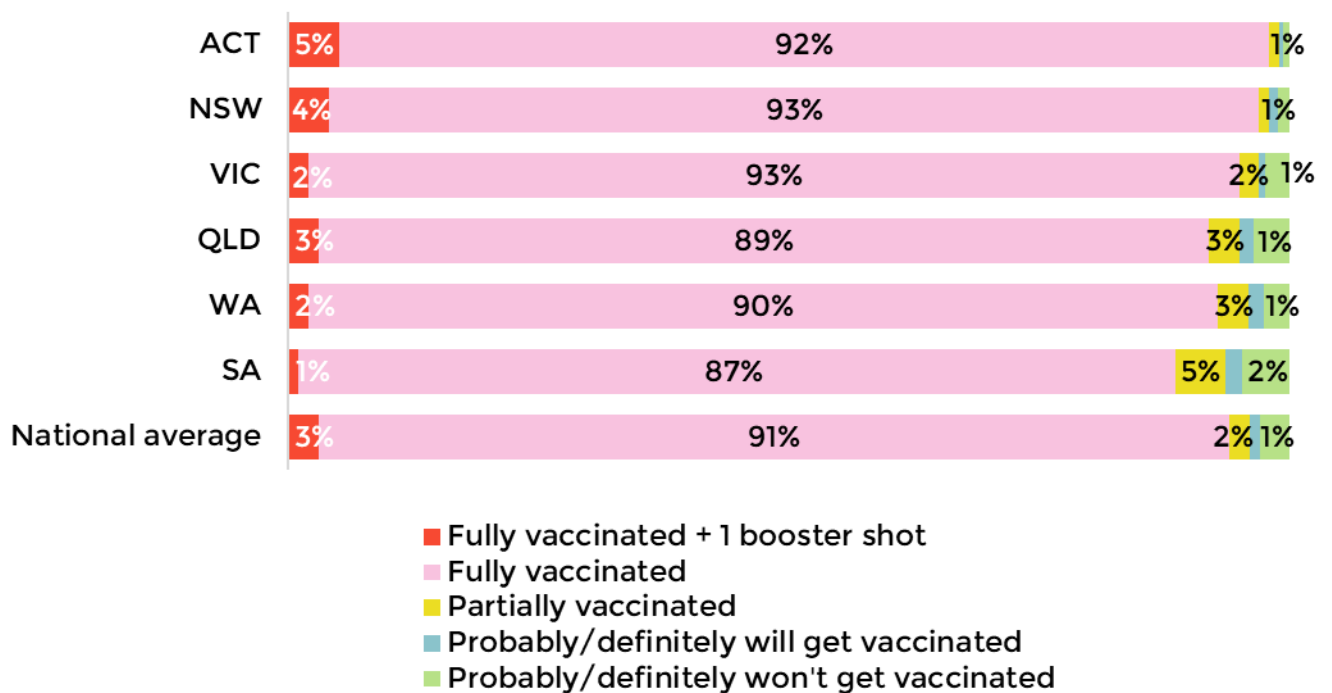
WA arts audiences continue to take up opportunities to be vaccinated faster than the state-wide population – with the vaccination rate in WA’s general population around 75% as of December 2nd. Shortly after data collection, WA joined other states in [introducing vaccine requirements for 75% of the state’s workforce](#). This policy is being brought into effect in a phased approach, with a view to have 90% of the state’s population fully vaccinated by 31 January 2022.

Of the 4% of audiences who are not vaccinated, 1% say they probably or definitely will get vaccinated, suggesting that vaccine supply issues have now largely been addressed for audiences participating in the study. Around 3% say they will probably or definitely not get the COVID-19 vaccine.

Vaccination rates vary by state, with vaccination rates among WA audiences lower than that in outbreak-affected states like the ACT and NSW (97% fully vaccinated) – but leading among the ‘rest of the country,’ along with QLD (92% fully vaccinated) and ahead of SA (88% fully vaccinated).

Vaccination rates also increase with age, with 99% of WA audiences aged 75+ fully or partially vaccinated, compared to 86% of audiences under 35 and 84% of audiences aged between 35 and 54.

Figure 1: Proportion of audiences who are vaccinated November 2021, by state/territory (n=7,484)



WA audiences are increasingly optimistic that vaccination will allow normal activities to resume

Compared to July 2021, WA audiences are more confident that vaccination will allow normal activities to resume within a year. 4 in 10 (41%, up from 29% in July) are very confident in the vaccine effort, and only 8% (down from 15%) are not confident at all.

Confidence in the success of the vaccination program tends to be lower than in the outbreak-affected states of NSW (47% very confident), VIC (45% very confident) and the ACT (45% very confident) – where vaccine rates are higher and audiences have had longer to acclimatise to the idea of a ‘COVID-normal’ world.

In WA, which has seen contained outbreaks of a shorter duration, audiences are uncertain and concerned about complacency in the community. One audience member said,

‘Western Australia is lagging behind other states and territories in vaccination, I think because too many West Aussies are complacent about our COVID-free status. I suspect there will be an outbreak here at some time and if that occurs, we may find ourselves facing tough restrictions.’

Another respondent said,

‘I am holding off on being vaccinated due to the WA border closures. As soon as some indication is given as to a reopening to the rest of Australia I will immediately be vaccinated, as I believe it is the key to resuming our pre-2020 lives.’

Audience comfort in WA is consistent with pre-Delta levels, but changing conditions may have an impact

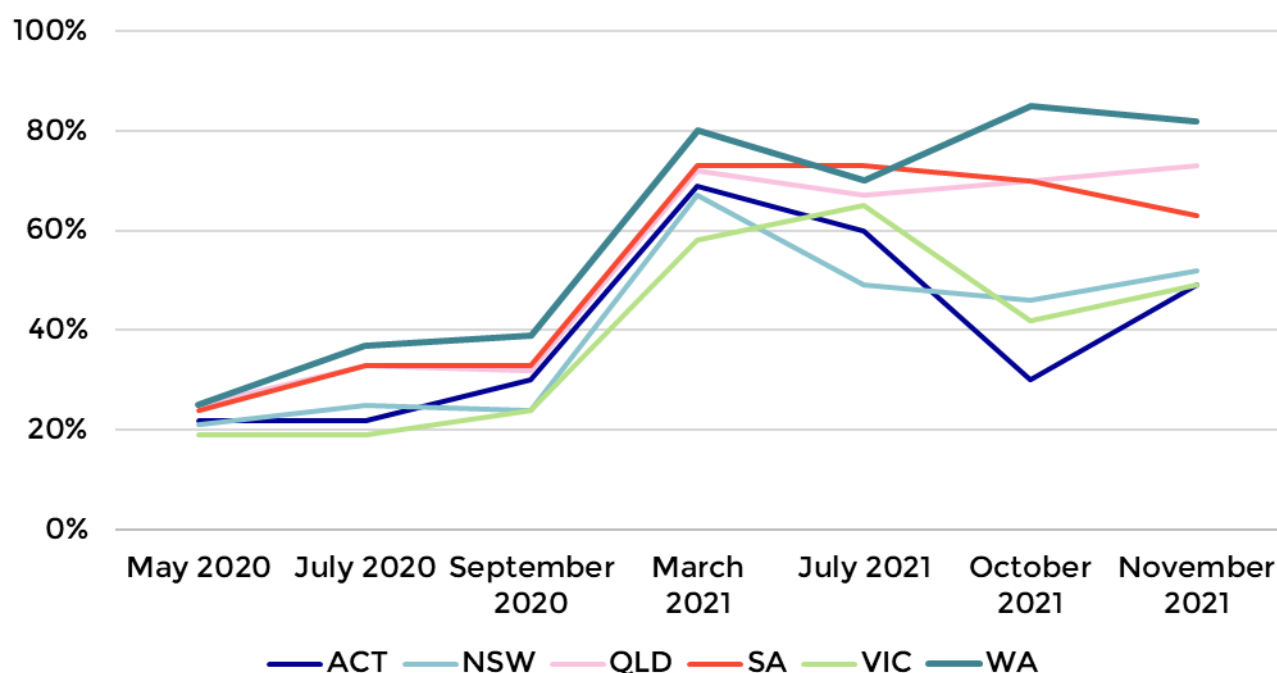
Audience comfort levels in WA are mixed right now. Although the majority of WA audiences feel safe and comfortable at present, confidence is likely to be impacted by risk factors like the opening of interstate and international borders.

After disruptions caused by countrywide outbreaks of the Delta strain in July, WA audience confidence has returned to pre-Delta levels, and the majority of audiences are ready to go ‘now or as soon as it is permitted’ (82%, stable with 80% in March 2021).

As WA approaches its first reopening milestone to fully vaccinated travellers in early 2022, audience comfort is likely to continue to waver. One WA audience member said,

‘I feel safe with borders currently closed. I’m sure when the borders open and the risk of COVID in the community increases I will feel less comfortable.’

Figure 2: Proportion of audiences who are ‘ready to attend now or as soon as permitted’, by state/territory, May 2020 to November 2021 (n=7,637)



WA audiences are equally, if not more, comfortable with arts attendance than other public activities

In a positive sign for arts and cultural venues, WA audiences are equally, if not more, likely to be 'very comfortable' with arts attendance than with many other public activities.

The majority of WA audiences feel very comfortable at museums and galleries (90%), outdoor events with fixed seating (88%), community art spaces (84%) and large theatres and concert halls (79%). There are only a few venues where less than three-quarters of audience members feel 'very comfortable': outdoor events without fixed seating (73%), comedy clubs or live music venues (55%) and hands on exhibits (40%).

By contrast, while most WA audience members feel very comfortable eating at a local restaurant or bar (92%) or going to a local cinema (82%), around 7 in 10 are very comfortable using public transport (72%), exercising at a gym (69%) and attending a sporting event (69%). Even smaller numbers feel very comfortable flying domestically on a commercial airline (36%).

Live attendance

Attendance patterns are normal right now, but booking behaviours suggest WA audiences are uncertain about the near future

When asked about their attendance behaviours in the fortnight before data collection, 79% of WA audiences reported they had attended an in-person arts or cultural event. This proportion is consistent than pre-Delta levels, with 77% of WA audiences attending in March 2021.

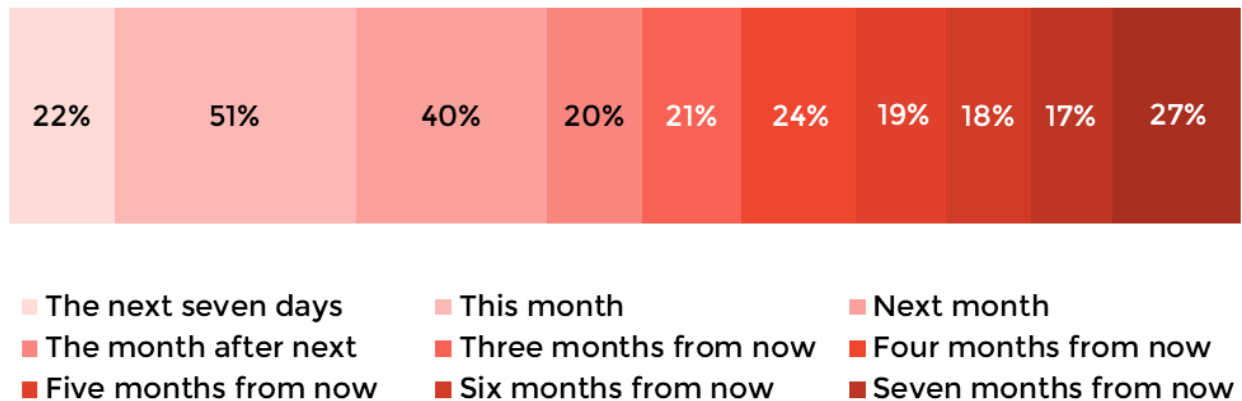
In a promising sign for attendance, almost 9 in 10 (86%) WA audience members also reported making plans for in-person attendance in the future.

As of 7 November, bookings appear to be concentrated in the short term, with most purchasing tickets for events in November (51%) and December (40%) – as shown in Figure 3.

Relatively fewer bookings are made in the mid-term – which may reflect the availability of events, but could also suggest that audiences are uncertain about attendance in the months following the reopening of the WA borders.

Compared to the earlier months, smaller proportions of WA audiences are booking for January (20%), February (21%), March (24%), April (19%), May (18%) and June (17%), while proportions increase again for July (27%).

Figure 3: In the past fortnight, did you purchase tickets for one or more live shows or performances that are scheduled for...? WA audiences (n=338)



Audiences are cautious about the risk of transmitting the virus or being a close contact and needing to isolate

When asked what would prevent them from attending arts and cultural events in the next year, WA audiences were most likely to name the risk of contracting or transmitting the virus (49%, up from 28% in July 2021) as their primary concern – as shown in Figure 4.

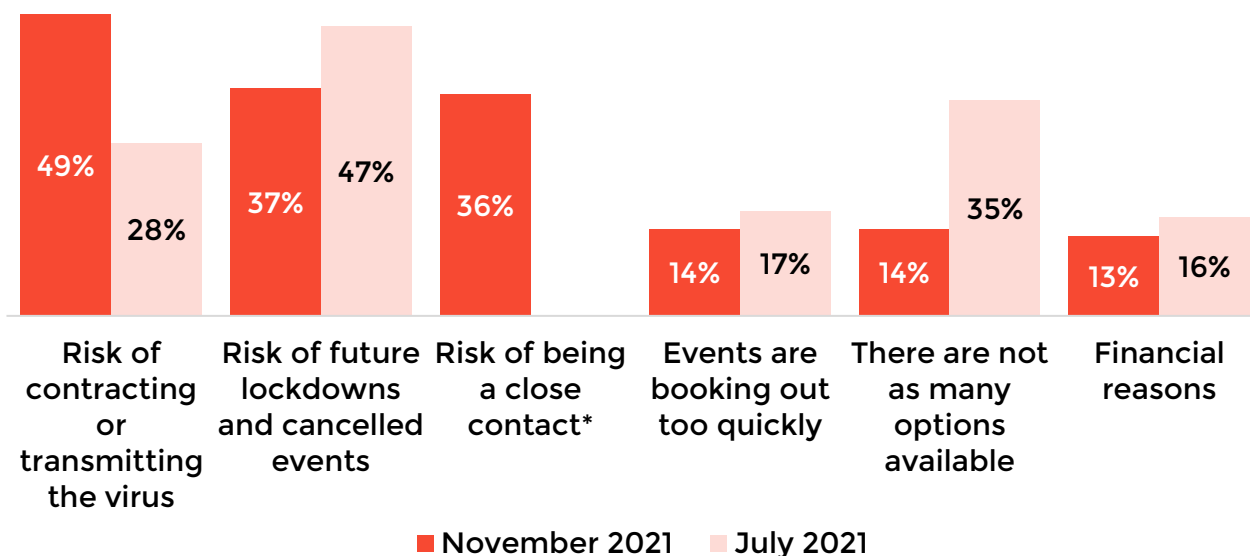
Given that the prospect of attending events while cases are active in the community is a new one for many WA audiences, audiences are understandably wary about the risks arising from virus circulation – even if they are vaccinated. One said,

‘We currently have no COVID-19 in Western Australia. Opening borders means that it is highly likely that the virus will be brought and transmitted here. I don't want to get it, even though I am fully vaccinated.’

Another 36% of audiences were concerned with the risk of being a close contact and needing to isolate.

While still a major barrier to attendance, the risk of lockdowns and cancelled events has decreased in importance since July (37% in November, down from 47%). Audiences were also much less likely to report being prevented from attending because there were ‘not as many options available’ – only 14% of audiences, down from 35% in July.

Figure 4: Proportion of WA audiences who say these factors will prevent them from attending in-person arts and culture events as they used to in the past, July 2021 (n=927) and November 2021 (n=816)



*Option introduced in Phase 6 – no historical comparison available

Outlook for comfort levels

Conditions in WA are changing and will continue to do so over the next few months, when borders open and vaccine mandates are introduced for some venues and events. To understand how readiness to attend may change, audiences were asked to consider a hypothetical **'COVID-normal' scenario** for attending events in which the following conditions were in place:

- ▶ interstate and international borders are open
- ▶ at least 90% of the population over 12 is vaccinated
- ▶ proof of vaccination or a negative test result is required at entry
- ▶ seated venues are operating at 100% capacity

Living under 'COVID-normal' conditions may affect comfort to attend cultural venues

Responses to the 'COVID-normal' scenario were mixed, with high vaccine coverage competing with risk factors like the opening of borders and removal of capacity limits.

Many audience members anticipate that this type of scenario would see WA exposed to unprecedented levels of the virus, with one saying,

‘As WA has not really had a COVID-19 outbreak, I acknowledge that I may not be as comfortable as I am currently once borders reopen to overseas and interstate.’

Others felt that a scenario where 90%+ of the country was vaccinated, which is the vaccination target of WA’s [Safe Transition Plan](#), would give them the confidence to attend. One said,

‘Up until now, I was over the moon about living in our WA bubble. Now I think this bubble has had a negative effect in the area of vaccination. There are people in our community who don’t seem to feel the need to get vaccinated because of our protective bubble. I will be more confident when I see WA’s fully vaccinated numbers up to 90+%.’

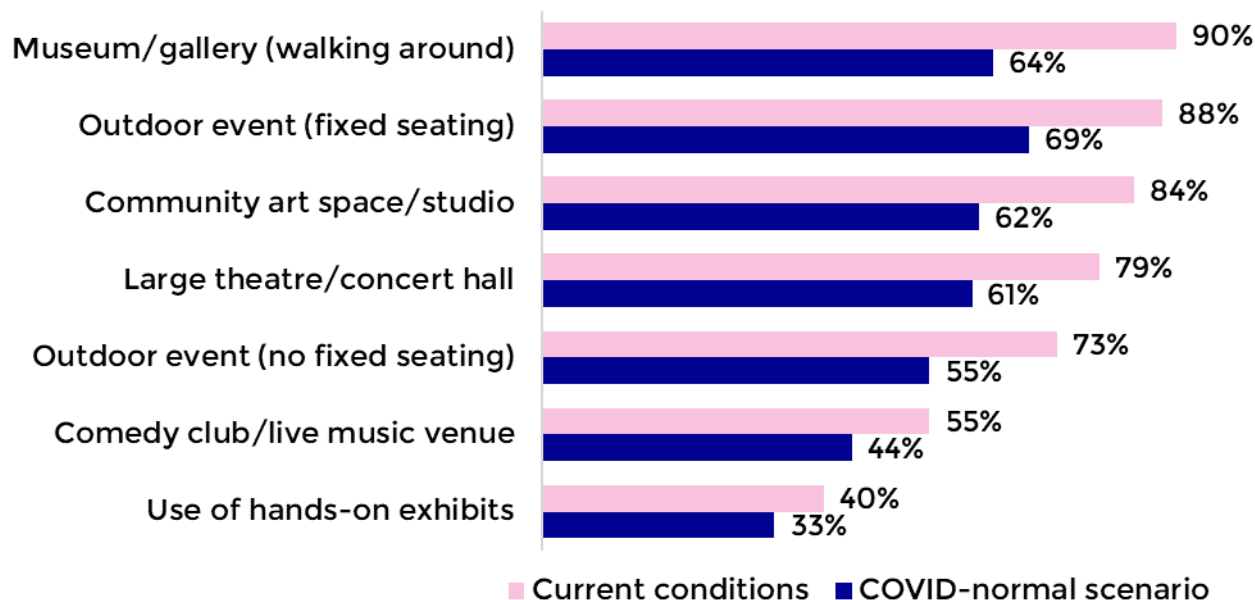
Another said,

‘Once 90% vaccination rates are achieved, it is inevitable that we endeavour to resume ‘normal’ living. It is something we will have to live with, just as we do with new strains of the flu and yearly injections.’

On average, comfort decreased for previously ‘high-comfort’ venues like museums/galleries (-26% very comfortable), outdoor events with fixed seating (-19%), large theatres and concert halls (-18%) and outdoor events without fixed seating (-18%) – as shown in Figure 5.

It also decreased for ‘low-comfort’ venues like comedy clubs and live music venues (-11%) and hands-on exhibits (-7%). This data suggests that reaching ‘COVID-normal’ will take some time as WA audiences navigate the risks presented by open borders and vaccine uptake.

Figure 5: Proportion of audiences in WA who would be 'very comfortable' to attend selected cultural venues in current conditions and COVID-normal scenario, November 2021 (n=818)



Some audience members expressed that they had difficulty imagining how they would feel in this scenario, given that they have not faced high cases of COVID-19 before – and that their comfort would be contingent on the extent of the virus in the community. One WA audience member commented,

'I think the discomfort comes from the change in having almost no risk of catching COVID in WA to being open to the world and learning to "live with it." It will take time to adjust to the change in thinking.'

Another said,

'It feels too unreal to think about what the future would be like with the COVID situation in NSW and VIC. I would be waiting for case numbers to increase and as I work in aged care and childcare I'm very stressed about opening up.'

Another said,

'It's hard to know exactly, being in WA where we have really had little to no exposure to the virus, but unfortunately, we're eventually going to have to deal with it. I think while there's likely to be initial hesitation or fear around being exposed to the virus, people will gradually get more and more used to it being the new norm. For me, knowing that the other people at events I'm attending are fully vaccinated would help me to feel a lot safer.'

Some audience members remain uncertain about how the vaccination effort will proceed in the long term

While high vaccination coverage is an important aspect of this **‘COVID-normal’ scenario** for most WA audiences, some are conscious of factors that could complicate the vaccination effort – such as the risk of new variants, breakthrough infections, or complications caused by existing health vulnerabilities. One WA respondent said,

‘As we are made to believe the vaccine does not stop us from catching the virus, I won’t be fully comfortable [when] the borders are open.’

Another commented,

‘Vaccination results in a false sense of security, and also complacency, where the virus could actually spread more easily. You can still catch it; you can still spread it.’

Some audiences are adopting a ‘wait and see’ approach. One said,

‘Living in WA would be very different and it would be a wait and see for months.’

Another said,

‘I would examine the circumstances of the time and decide, and also look and hopefully trust the judgement of the organisation.’

COVID-safety

The most widely encouraging COVID-safety measures are check-ins and proof of vaccination

With a degree of uncertainty persisting, it is clear that COVID-safety will be critical for maintaining confidence in WA.

When asked about a list of potential COVID-safety measures at cultural venues, most WA audiences say they would feel encouraged to attend by the majority of safety measures. Their feedback confirms the role of COVID-safety in the recovery process.

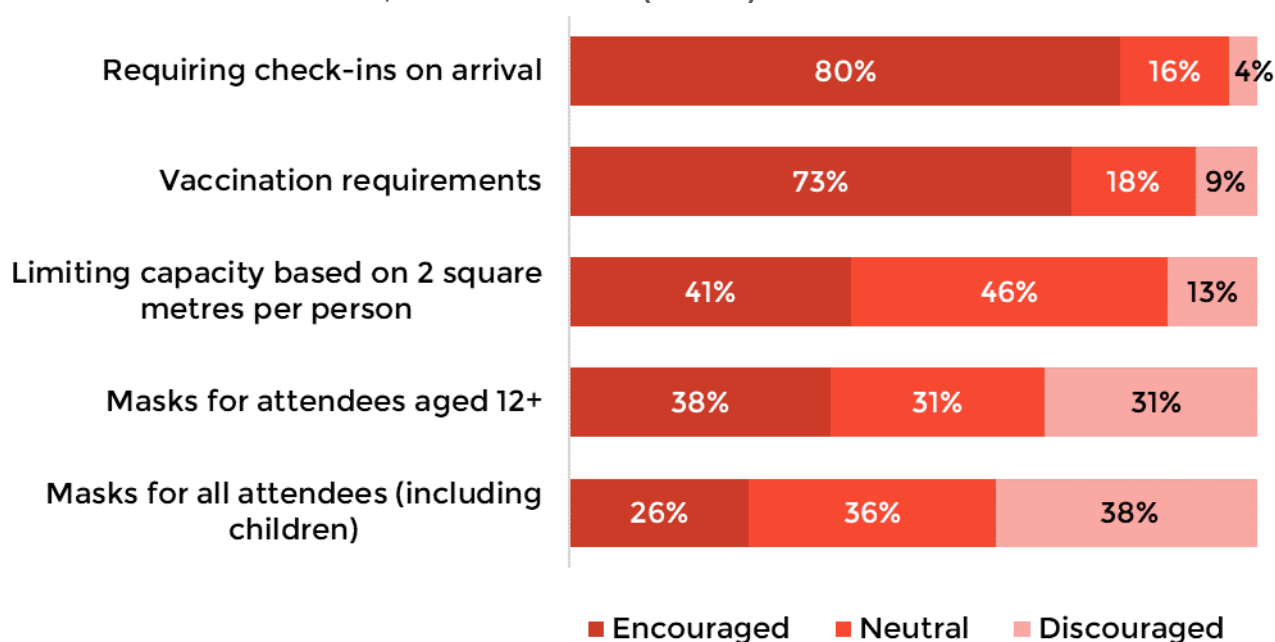
The largest proportion of audiences said they would be encouraged by requiring check-ins upon arrival (80%, stable since October 2021).

The next most widely encouraging COVID-safety measure was proof of vaccination required at entry (73%). Support for this measure remained stable since October (73%).

In spite of the debate surrounding vaccine passports, only 9% of WA audiences say this measure would discourage them from attending – a positive sign considering the upcoming implementation of vaccine passports in WA venues. The proportion discouraged was slightly higher than in outbreak-affected states like NSW (5%) and the ACT (6%), but lower than QLD (13%) and SA (13%).

Audiences feel more neutral about social distancing guidelines, with 41% saying they feel encouraged by limiting capacity based on 2 square metres per person and another 46% feeling neutral.

Figure 6: How much would each of the following steps discourage or encourage you to attend? WA audiences, November 2021 (n=804)



Mask-wearing continues to be polarising for WA audiences, but mask mandates could help make audiences feel more comfortable when borders open

2 in 5 WA audience members feel encouraged by mandating face masks for people aged 12 and over (38%, consistent with 40% in October), while 1 in 3 (31%, down from 34%) would be discouraged.

Masks are not required in most indoor venues currently, but the risk of future outbreaks may change perceptions surrounding mask mandates. As one audience member said,

‘I am a bit apprehensive about how things will change in WA when our borders are open and then (not like now) we will probably have to wear masks.’

Some audiences said they don't see a need for masks while the virus is not circulating in the community. As one said,

'Living in WA - at this stage with border restrictions, I feel safe to go out amongst my community. However, going forward I do believe that the need for masks will be required and also proof that people are vaccinated.'

Around one-quarter of WA audiences (26%) are encouraged by masks for all ages and 38% would find masks for all ages including children discouraging - the largest proportion discouraged by any COVID-safety measure. One-third (36%) feel neutral about this measure.

WA parents were, understandably, the most likely to take issue with this measure, with 44% saying it would discourage them from attending.

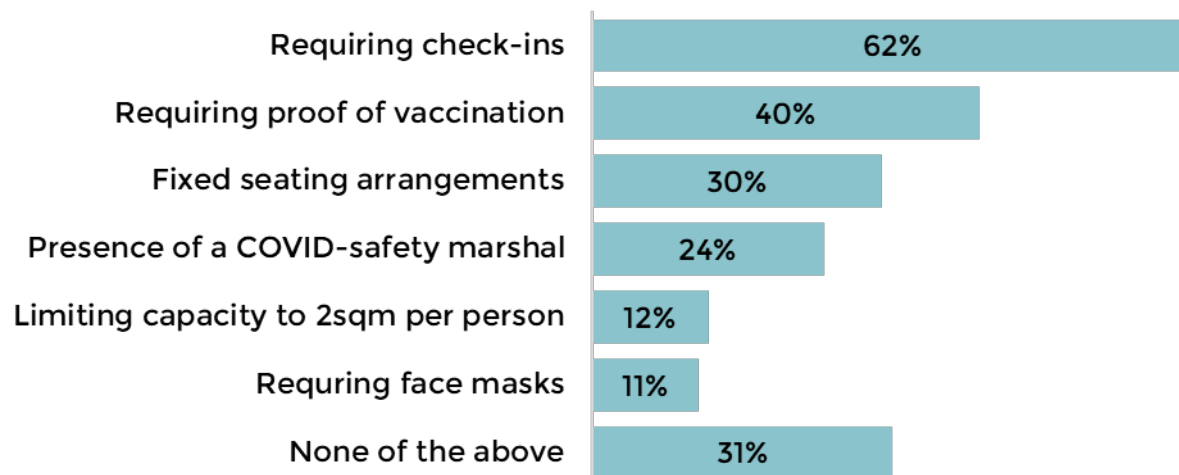
2 in 5 WA audience members won't attend indoor venues unless proof of vaccination is required at entry

When asked whether any COVID-safety measures absolutely need to be in place to attend a large theatre or concert hall, the largest proportion of WA audiences said check-ins upon arrival (62%).

2 in 5 (40%) of audiences won't attend without proof of vaccination requirements - and are likely to be in favour of policy changes to mandate vaccine passports at venues. One audience member said,

'Proof of vaccination and restricting numbers of people would make me more comfortable. If COVID was in the WA community, I would expect face masks to be compulsory to attend any event.'

Figure 7: Would any of the following measures absolutely need to be in place for you to attend an event in a large theatre/concert hall today? (select multiple). WA audiences, November 2021 (n=816)



Smaller – though significant – proportions of WA audiences will rely on fixed seating arrangements (30%) and the presence of a COVID-safety marshal to assist with compliance (24%).

Mask-wearing appears less important for the time being, with just 11% of WA audiences saying they'd rely on the requirement to wear a mask.

Around 1 in 3 WA audience members (31%) say they will need 'none of the above' in place, and are happy to attend without these measures. But many respondents shared that this depends on outbreak conditions in WA – and will likely change as the border reopening progresses. One said,

'WA is very safe at the moment but I still think that checking in, so that contact tracing can easily take place if necessary, is a sensible precaution. Once our border opens, I would want proof of vaccination as well.'

Another commented,

'Happy to attend with no measures as I'm in WA. Once borders are open and COVID may circulate I would like measures such as proof of vaccination being required for entry.'

WA audiences are more comfortable at outdoor venues, but proof of vaccination is still key for 1 in 3 audience members

Overall, audiences are relying on COVID-safety measures to a slightly lesser extent at outdoor events, with open-air venues alleviating some of the risks associated with virus transmission.

Around half of WA audiences still say check-ins (53%) would absolutely need to be in place at outdoor events, with another 1 in 3 (34%) calling for proof of vaccination (Figure 8).

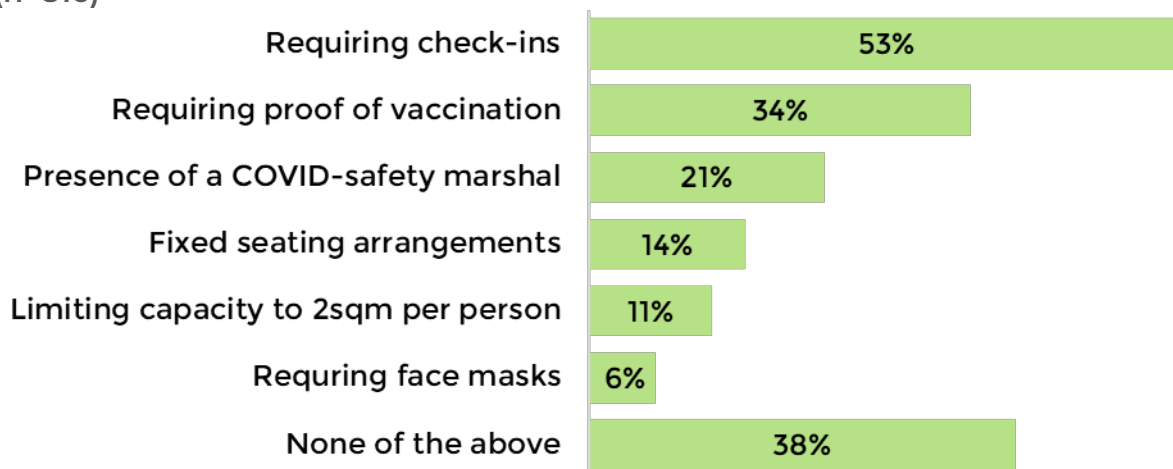
The presence of a COVID-safety marshal was still important for 21% of WA audiences, signalling that many attendees want to see the rules observed at all venue types. One said,

'Being in WA we're quite lucky, but it's nice to see venues not getting complacent and following bare minimum rules at least, thus my preference for check-ins and a COVID safety marshal.'

Another said

'I feel it is necessary to have marshals as I have seen so many people walk straight past sign in stations without registering.'

Figure 8: Would any of the following measures absolutely need to be in place for you to attend an outdoor event today? (select multiple). WA audiences, November 2021 (n=816)



Most measures were considered less crucial when attending outdoor venues, relative to a large theatre/concert hall – such as requiring face masks (6%, compared to 11% at theatres) and fixed seating (14%, compared to 30%).

Air circulation and the freedom to move around play a key role in decision-making for some audiences, and many perceive outdoor venues to be safer than indoor venues. One WA respondent said,

‘When COVID is circulating I believe I’ll always be concerned about close contact, but less so outdoors and when minimal surfaces are touched by all.’

Some WA audiences see rapid testing as an additional or alternative measure to proof of vaccination

Qualitative data suggests that audiences are starting to see rapid antigen testing as an important complement to COVID-safety measures like vaccine passports. One WA audience member said,

‘My main concern is that even with both vaccinations, it doesn’t stop people from catching and transmitting COVID. It feels like the safest way is (despite being double vaccinated) to have everyone check in and possibly show a recent negative test.’

Another said,

‘I’d want a negative test to be required if a vax certificate was not produced. Otherwise, I would say I’m not comfortable to attend.’

As rapid tests become more widely available, it’s likely they can be introduced as an alternative or additional measure, similar to policies in Europe and North America.

Some audience members are worried about the reliability of rapid antigen tests, and suggest they need to be used in conjunction with other measures. One WA respondent said,

‘Mandatory proof of double-vaccination seems essential to me (and these must be fraud-proof or will be meaningless). Will negative test results be reliable or also easily faked? Test results should only be for those with true medical exemptions. The unvaccinated should be excluded.’

Another said,

‘I’d probably wear a mask to most large events. How much we can rely on a negative test result depends on the type of test and the false negative rate, especially if it’s a rapid on-site test. I would much prefer proof of vaccination. As new strains emerge, it might require both proof of vaccination and a rapid test.’

Buyer behaviour

8 in 10 audience members say they’ll be attracted to events in their local area in the next 12 months – with ‘local loyalty’ being both a response to pandemic hardship and a way to alleviate risk

When asked to what extent audiences would be attracted to events in their local area in the next 12 months, 8 in 10 (79%) of WA audience members agreed that they would be looking local – while only 3% disagreed.

Some audience members suggested that restrictions on travel had made them more aware of and connected to arts and culture in their local area, with one WA audience member stating,

‘Despite my love of travel and having travelled regularly across the country and interstate for art and culture events, I don’t see that happening as easily anymore. I’m sure I will find more events locally to enjoy and will be happy to support local artists and venues.’

A desire to support local acts and venues after a long period of hardship was also a factor, with one WA audience member saying,

‘Need to support local, especially local art. It’s been a tough year for the sector.’

Another said,

‘My choice of events would not change, but I think the pandemic has made me focus on supporting local artists first.’

Others say that local events feel 'safer' – from both the risks of virus transmission, and complications arising from cancellations. One respondent said,

'I don't want to travel far afield because of the additional risk of travel in public transport, the close proximity of queues, and using public toilets. Closer to home makes it easier to avoid the contact and, I can use my own transport.'

Some WA audiences are looking for uplifting events – and most say they're not drawn to works that explore the pandemic just yet

When asked to share their preference for the types of arts and cultural content they would engage with over the next year, the majority of WA audiences said they were interested in seeing the same kinds of events they used to attend, pre-pandemic (93%, stable with 94% in July 2021). One commented,

'I just want my normal life back and will go to anything and everything wherever I can! I also very much want to be able to support all the brilliant musicians, dancers, singer, etc. who have worked their butts off throughout their careers to achieve their levels of performance - and have done it so very hard over the past 18 months or so.'

Though in the minority, the proportion of WA audiences who say they will prefer 'light-hearted programs' has been steadily increasing since last year – with 40% of audiences now agreeing with this statement (compared to 32% in July 2021 and 21% in May 2020). Some audience members suggested that the cumulative impacts of the pandemic have left them seeking escapism and uplift, with one saying,

'I go to theatre and events as enjoyment, escapism, critical thinking, socialising - I wouldn't be eager to see anything discussing the pandemic when it is still such a huge part of everyday life and will be for some time.'

The proportion of WA audiences likely to seek 'works that make sense of the pandemic' remains low (13%, up from 9% in July), with 46% disagreeing that they will be attracted to these kinds of works. When explaining their answers, some expressed 'pandemic fatigue' and/or an aversion to didactic works, for example:

'I am looking forward to supporting the arts and with everyday life difficulties, I don't need to be reminded of the pandemic when I want to be entertained.'

And another saying,

'I'd rather just forget about the pandemic - I can't even watch or read the news anymore as it either makes me anxious or I'm bored of it.'

Consistent with the [Visions for Culture](http://www.thepatternmakers.com.au/visions-for-culture-analysis) (www.thepatternmakers.com.au/visions-for-culture-analysis) in late 2020, this data confirms that many audiences see a role for the arts in the recovery process – and will turn to trusted organisations for connection, joy and healing.

There are some positive signs for subscriptions and memberships, with audiences wanting to keep supporting artists

When asked whether they were going to purchase a subscription or membership in 2022, 4 in 10 (40%) of WA audiences said they were likely, pointing to an opportunity area for further investigation.

Audiences mentioned wanting to support arts organisations and performers – with some suggesting that they’ve become loyal to certain organisations because of how they’ve handled the difficulties of the pandemic. One said they plan to subscribe ‘to support the orchestra even if events are cancelled’.

Another explained,

‘Despite the knowledge that there was a reasonable chance of events being cancelled, we still maintained our season membership to one orchestra in the hope that this would assist it's short- and long-term viability.’

A slightly larger number (43%) of WA audiences said they were unlikely to subscribe next year. Some audiences say they are not in a financial position to do so, while others mentioned the uncertainty of planning for events in future. As one mentioned, they won’t be subscribing due to ‘cancellations and rescheduling likely with borders opening.’

Another said,

‘I don't want to spend money if there will be lockdowns.’

Generally speaking, over the course of the pandemic, the proportion of arts audiences purchasing subscriptions and memberships has fallen. In WA, similar numbers purchased a subscription or membership for the 2021 season (38%), compared to the 2020 season (39%).

1 in 5 (19%) of WA audiences have already made a donation to an arts or cultural organisation for the 2021/22 financial year – a slightly smaller proportion than those who donated in the 2020/12 financial year (24%), though more than half of the fundraising year remains.

Online participation

4 in 10 WA audience members are participating in online arts and culture experiences, with participation rates up from July

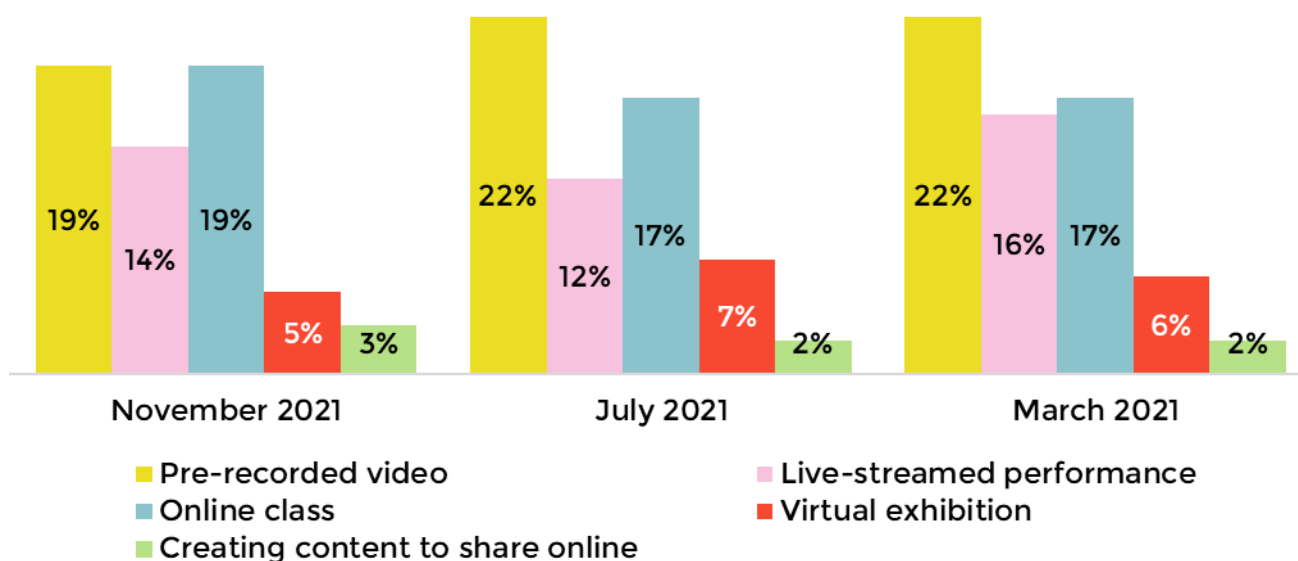
In the first half of 2021, participation in online arts and cultural activities trended downwards after an early pandemic ‘boom’ in 2020 – with many audience members reporting ‘screen fatigue’ and an eagerness to return to regular, in-person attendance.

As restrictions on live attendance have remained unchanged for several months, online participation levels have remained stable in WA, with 40% participating in an arts or cultural activity in the fortnight before data collection (consistent with 40% in July).

The proportion watching pre-recorded video has decreased slightly (19%, compared to 22% in July), while participation in other activities is consistent, such as watching live-streamed video (14%, stable with 12%) and attending virtual exhibitions (5%, stable with 7%). Participation in online courses continues to be the second-most popular digital activity, with 19% participating (stable with 17%).

WA audiences are the least likely to be participating in online arts and culture (compared to a national average of 48%) – with outbreak-affected states like NSW and VIC the most likely to engage with digital programming, particularly during prolonged outbreaks.

Figure 9: During the past fortnight, have you participated in any of the following online or digital arts & culture experiences? (select all that apply). WA audiences, November 2021 (n=822)



1 in 3 WA audiences would be happy to attend a digital alternative to a cancelled event

In November 2021, WA audiences were asked 'In the case of a future live event being cancelled due to COVID-19, how likely would you be to attend a digital program featuring elements of the planned event?'

Around half (47%) say they are unlikely to attend a digital program, though a significant proportion say they are likely (30%) – while 23% are neutral.

WA audiences were some of the least likely to say they were interested in attending a digital alternative, along with audiences in SA (28%) and QLD (28%). Audiences in outbreak-affected states like NSW (38%), ACT (38%) and VIC (35%) were more likely.

Those who were likely to seek out digital alternatives suggested that they could be a way to avoid disappointment in the event of cancellations. One WA audience member said,

'I accept things may change and events be cancelled, would still wish to have options regardless, however that may not be possible for the organisers, times are difficult.'

Another said,

'Online is a great avenue to reach a wider audience, and if something I really want to go see is offered online then I would use that platform.'

And,

'In case of cancellations due to COVID restrictions a virtual platform for exhibitions, talks or performances is a great alternative to still be able to support local, real, artists – who still need an audience and support base.'

Some WA audience members had caveats – for example, some felt that a digital alternative would need to be offered at a different price point, saying,

'It depends on whether I'd still be charged for my ticket for the online event, as I often find that online events lack most of the experience given by live events so it's difficult to give the same value to the two.'

Others said they would likely participate in a digital alternative if other options weren't available. As one said,

'If an event was to be cancelled due to a lockdown I would prefer it if the event were held online, but we get the option to get a slight refund of our ticket (20%), or people may be happy to leave their money with the performers.'

Another commented,

‘My first preference is for the in-person experience to be rescheduled; second preference is to have a digital experience.’

Some respondents advocate for hybrid models, saying they would appreciate the flexibility of a digital option. As one said,

‘Using online experiences is as much about setting aside time as anything else. If I had planned an in-person event, but it was cancelled, I would probably happily spend the same time watching it instead, if I could easily access live-streaming.’

Others similarly supported flexibility, but noted that the quality of digital alternatives to in-person events may differ to those designed specifically for a virtual environment. One said,

‘Due to accessibility and health issues, the availability of online events gets a big tick from me. If an event was designed to be online and remains online, then I'm more likely to go. If an event was designed to be an in-person experience and it gets converted to being online, it may not translate well.’

A greater proportion of WA audiences see an ongoing role for digital in their lives – and digital spending has increased slightly

Overall, the proportion of WA audiences who see a role for digital arts experiences in their lives outside of lockdown has increased since this sentiment was first measured in July 2021.

A larger proportion of WA audiences now see a ‘substantial role’ for digital arts experiences in their lives (22%, up from 8% in July 2021), or even a ‘small role’ (47%, up from 40%). The proportion who sees ‘no role’ declined between July and November (31%, down from 51%).

Some WA audience members suggested that digital could have a role to play while borders remain closed. One person said,

‘Online performance still plays a substantial role in providing access to events that are not available in our region.’

In a positive sign for digital programming, in November, 31% of WA audiences participating in online arts and culture paid for an experience, increasing from 24% in July 2021.




Online audiences were more likely to be engaging in all payment types, including purchasing a single, pay-per-view experience (11%, up from 8%), making a donation for something seen online (13%, up from 10%), subscribing to a platform for on-demand content (10%, up from 4%) or subscribing for a program/season including digital offerings (8%, up from 5%).




Marketing of digital experiences can be targeted to three groups

WA audiences were asked about the role that digital arts experiences play in their lives outside of lockdown. Based on their responses, WA audiences can be divided into three groups:

- ▶ **Digital devotees** are the 22% of WA audiences who see a 'substantial role' for digital experiences in their lives. They can be expected to show deeper and more dedicated engagement. Just under half (47%) participated in arts and cultural activities online in the fortnight before data collection – and on average are more averse to attending in-person right now. Half (51%) are paying for online experiences and half of those (46%) spent more than \$50 in the past fortnight.
- ▶ **Tired of tech** audience members are the 31% who see 'no role' for digital in their lives and are generally more eager to return to in-person attendance. Some report being 'screen-fatigued' and others say that after trying digital events, they just aren't that interested. However, during stay-at-home orders, some may still be willing to participate online in the absence of in-person alternatives.
- ▶ **Selective but supportive** audience members are the 47% that see a 'small role' for digital in their lives. They feel favourably about online offerings but will generally only participate in the right events and under the right conditions. They are likely to favour digital events that are more convenient, more accessible or less risky than in-person alternatives. Just under half (46% in November 2021) participated in the fortnight before data collection, while around 1 in 4 (26%) paid to access online content.

Table 1: Key segments for digital audiences, WA audiences (822)

	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	22%	47%	31%
When live attendance is possible, the role of digital in their lives is...	Substantial	Small	None
Online participation rate	47%	46%	17%
Live stream participation	19%	16%	5%
Most interested in	Quality, high-production digital programming	Hybrid events	Live performance
Spending behaviours	51% online are paying for experiences	26% online are paying for experiences	2% online are paying for experiences
Demographic features	<ul style="list-style-type: none"> • More likely to be in an outbreak-affected state • More likely to have a disability (6%) • More likely to earn income performing art (19%) 	<ul style="list-style-type: none"> • More likely to be a parent (21%) 	<ul style="list-style-type: none"> • Least likely to earn an income performing art (6%)

	Digital devotees 	Supportive but selective 	Tired of tech 
Proportion of audiences	22%	47%	31%
Other arts behaviours	<ul style="list-style-type: none"> • More likely to attend a digital alternative to a cancelled event (41%) • Typically attend performing arts very frequently (86% attend once a month or more) • Most likely to be donors to arts organisations (49%) 	<ul style="list-style-type: none"> • Typically attend performing arts frequently (72% attend once a month or more) 	<ul style="list-style-type: none"> • Most unlikely to attend a digital alternative to a cancelled event (72%)

What's next

To read about the story so far, visit the study's Australian homepage at: www.thepatternmakers.com.au/covid19.

There, you can also 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.

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