



2018 Arts & Culture Monitor Survey Report

Prepared for:

Culture and the Arts WA, a division of the Department of Local Government, Sport and Cultural Industries

Prepared by:

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1 Executive Summary

Arts and culture is considered to be important.

80% agree

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

93% 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 remain steady.

When asked 'how valuable is the role of arts and culture in your life?', the Value Index Score is 62.

- Results have remained fairly steady over the past 10 years.
- Similar to previous years, perceptions of individual value are lowest across regional WA. Perceptions of value are also lower among males and those with lower levels of education.
- Perceptions of individual value are highest among females, people who live in inner metropolitan suburbs and those with higher levels of education.

Arts and culture is seen to have a valuable role in the community with a Value Index Score of 75.

- This is the highest score over the past 10 years.
- Perceptions of community value are highest among females, Western Suburbs residents and those with a disability or impairment.

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

Only 23% of respondents agree that "the arts only helps those people who participate, not the broader community".

- Results have remained steady over recent years.
- Males and people who mainly speak a language other than English at home are more likely to agree that "the arts only help those who participate, not the broader community." Females, those living in the Western Suburbs and Inner South Suburbs, and people with higher levels of education are more likely to disagree with this statement.



Image credit: Fringe World Urban Orchard 2012

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, an increase of 3 index points since 2017.

- The Value Index Score is higher among people living in the Western Suburbs, females, those with children aged 12-17 years and people with a disability or impairment.

When asked 'how valuable is the contribution of arts and culture to the identity of the state?', the Value Index Score is 71, marginally increasing year on year since 2016.

- The Value Index score is highest among Western Suburbs residents.

The arts continue to make people feel good.

The Agreement Index Score is 75; on par with previous years.

- Level of agreement is greatest among Western Suburbs residents and those with higher levels of education.

Perceived ease of accessing arts and culture is on par with last year's high score

The Ease of Access Index Score is 64, up from a low of 53 in 2012 and on par with last year's score of 65.

- 56% feel it is easy to access or participate in arts and cultural activities in WA.
- Ease of access is highest in the Western Suburbs and improves with level of household income.
- Access is most difficult for people living in regional WA.

Attendance or participation in the arts has declined.

78% of respondents have attended or participated in an arts and cultural activity over the past 12 months; steadily declining from a high of 82% in 2014.

- 39% of respondents have attended or participated in an arts and cultural activity over the past month, continuing to fall from 50% in 2014; and 65% of respondents had attended or participated in an arts and cultural activity over the past 3 months, dropping from 73% in 2015.
- Lack of attendance or participation over the past 2 years has risen to 15% from 9% in 2016.

Level of participation varies across the community.

- Frequent participation (attended 5+ times in the past 3 months) is more likely among people in the Western Suburbs, those with higher levels of education and on higher incomes (over \$150k per year).
- Non-attendance is more likely in regional WA and among seniors, low income earners and those with lower levels of education.

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

Only 20% of respondents agree with the statement "all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone".

More funding wanted for the arts.

73% of respondents would be prepared to contribute more money to expand provision of and access to arts and culture.

- 55% of respondents believe \$2 per person per week is too low as an allocation for arts and culture.
- 40% would be prepared to double the contribution, up from 25% in 2016.
- Support for higher funding is greater in the Western and Inner South suburbs and among younger adults, those with younger children and people who mainly speak a language other than English at home.

Perceived value of the WA film and television industry is on par with the 10 year average.

68% of respondents rate the industry highly.

- The Value Index Score is 72, on par with the ten year average.
- Perceived value is highest in the Western Suburbs.
- Perceived value is lower among males, those with higher levels of household income and people who mainly speak a language other than English at home.

Perceived access to WA film and TV has dropped since 2017

33% of respondents consider it to be easy to access Western Australian produced film and television productions.

- The Ease of Access Index Score has dropped 10 Index points from 61 to 51 since 2017, though it is slightly higher than earlier years.

2 Strategic Insights

1. **Increase Government investment in arts and culture.** The arts are highly valued and 55% of the community believes an allocation of \$2 per person by the State Government is too low. This perception has remained consistent over the past 4 years.
2. As corporate giving is considered essential for the arts, **promote the benefits of arts sponsorships to attract more corporate support.**
3. **Explore opportunities to target highly engaged audiences** such as those with higher incomes, higher levels of education and living in inner metropolitan suburbs in order to promote philanthropy and support for arts and culture.
4. **Continue to support arts and culture as being accessible for children through their education.** 93% of respondents agree that this access is important.
5. **Explore ways to boost perceptions of the value of arts and culture for individuals.** Most respondents agree that the arts has broad community benefit, it makes people feel good and strengthens the sense of community and identity. However, the Individual Value Index Score remains steady at 62 and shows room to explore motivators and drivers for engagement and perceived value.
6. Fewer people have participated in or attended arts and culture activities over the past two years. Investigate possible causes and ways to reverse this trend and **develop strategies to increase attendance and participation in the arts.**
7. Identify factors that contributed to the significant rise in **accessibility of WA film and television** productions in 2017, and the rise in the perceived **value of WA film and television** productions in 2012 and 2017, and consider ways to repeat high performance in future.
8. **Access to arts and culture across regional WA** continues to be limited compared to metropolitan areas. Continue to explore ways to increase regional participation and boost tourism and economic development through arts and cultural events.
9. Investigate how to improve **accessibility and perceived value of arts and culture among those with lower incomes.**

3 The Study

3.1 Summary

Culture and the Arts WA (formerly the Department of Culture and the Arts (DCA), which now forms part of the Department of Local Government, Sports and Cultural Industries (DLGSC)), has conducted an annual Arts and Culture Monitor to track behaviour and attitudes towards arts and culture since 2003. The study assists DLGSC with KPI performance evaluation and strategic planning.

Consistent with previous years, the study was conducted using a self-completion, online survey.

31,707 online panelists from Thinkfield were invited to complete an online survey between 13 March and 27 March, 2018. Quotas were set by age, gender and location to aim to achieve a representative cross section of the community. To address a respondent bias by age and gender, the final sample was weighted to match the ABS population profile for Western Australia.

1,012 respondents completed a survey. The sampling error was reduced to $\pm 3.08\%$ at the 95% confidence interval. In effect, this means, if the survey response was 50%, we would expect the result from a census to be between 46.92% and 53.08%.

Table 1: Summary of the study			
Strategic Purpose	To monitor behaviour and attitudes towards arts and culture.		
Data collection type	Self completion, online survey		
Data collection dates	13 March to 27 March 2018		
Sample source	Thinkfield Online Panel		
Total invited	31,707		
Open Rate (# opened)	22% (6,833)		
Click Rate (# started)	4% (1,333)		
Sample Size - # completed	1,012		
Response rate*	14.8%		
Sampling error	$\pm 3.08\%$ at the 95% C.I.		
Quotas	By age, gender and location to match the population profile		
Weighting by age and gender to be representative of the general population		Male	Female
	17-34	1.202	1.036
	35-54	1.214	0.879
	55+	0.875	0.903

*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.

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):

Location

21% of respondents live in regional WA and 79% live in the Greater Perth Metropolitan area. Postcodes were grouped as follows:

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

Gender

46% of respondents were male, 54% of respondents were female and no respondents answered indeterminate.

Age

29% of respondents were aged 17-34 years, 34% were aged 35-54 years and 36% were over 55 years.

Lifestage

41% of respondents had at least one child living at home.

59% of respondents did not have children living at home. This includes single person households, group households, couples without children and empty nesters.

Highest level of education attained

29% of respondents had a high school leaving certificate, 22% had a diploma or advanced diploma, and 40% had a Bachelor Degree or higher. Around 9% answered 'other' or refused to answer.

Household income

42% of respondents had a combined household income before tax of up to \$75,000 and 43% were earning over \$75,000. 15% of respondents refused to provide this information.

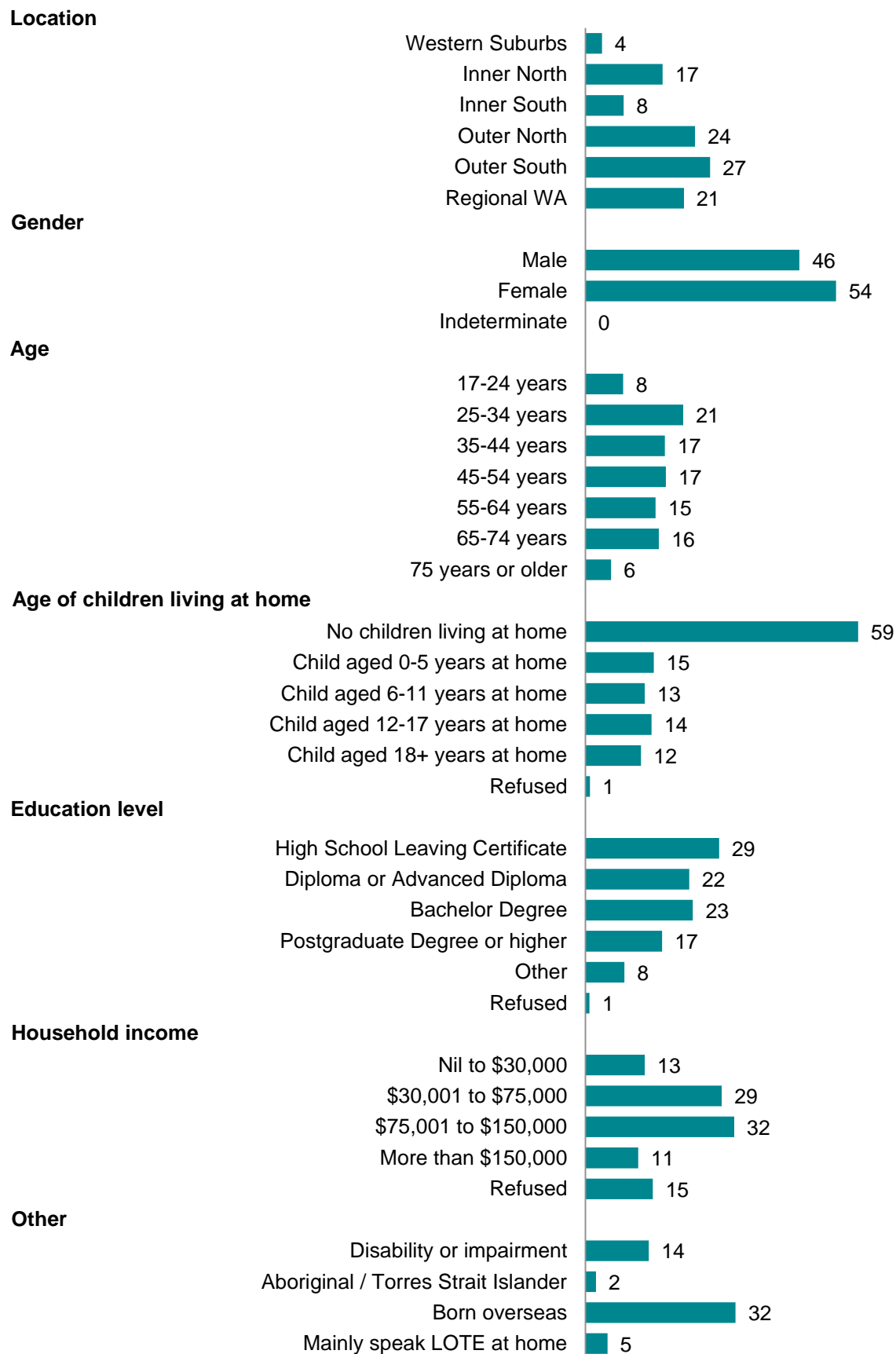
Disability

14% of respondents live in a household where they or someone they live with is affected by a disability or impairment.

Ethnic diversity

32% of respondents live in a household where they or someone they live with was born overseas, 5% live in a household where they or someone they live with mainly speaks a language other than English (LOTE) at home and 2% live in a household where they or someone they live with identifies as being an Aboriginal or Torres Strait Islander Person (please note that samples for Aboriginal/Torres Strait Islander were too low to report results for those specific demographics throughout this report).

Figure 1: Sample Profile
% respondents, unweighted



SURVEY FINDINGS

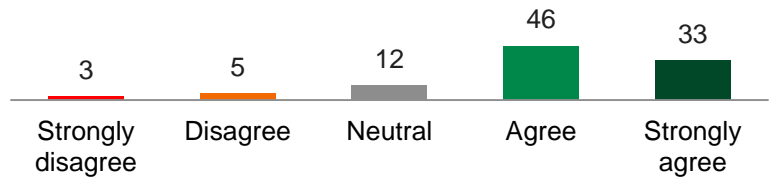
4 The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public

4.1 Level of Agreement

80% of respondents agree or strongly agree with the statement “The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public” (see Figure 2).

The mean score is 4.0 out of 5.0 and the Agreement Index Score is 76 out of 100.

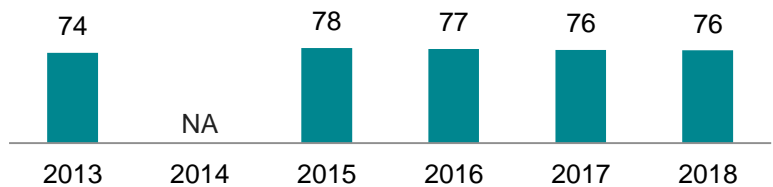
Figure 2: Overall Ratings
% of respondents



4.2 Trend Analysis

The Agreement Index Score has remained steady over the past 12 months (see Figure 3).

Figure 3: Trend Analysis
Agreement Index Score

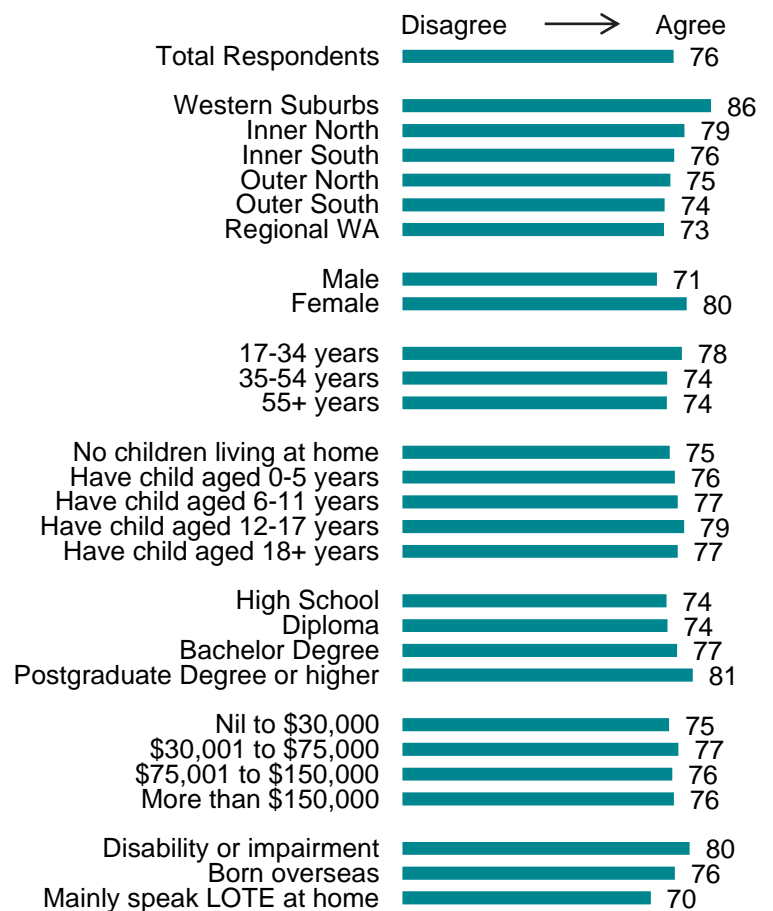


4.3 Community Variances

The Agreement Index Score is highest among those living in the Western Suburbs, females, people with a higher level of education and those with a disability and impairment.

It is lowest among males and those who mainly speak a language other than English at home (see Figure 4).

Figure 4: Community Variances
Agreement Index Score



Q3. 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 = 989) NB: 2% of all respondents answered 'unsure'

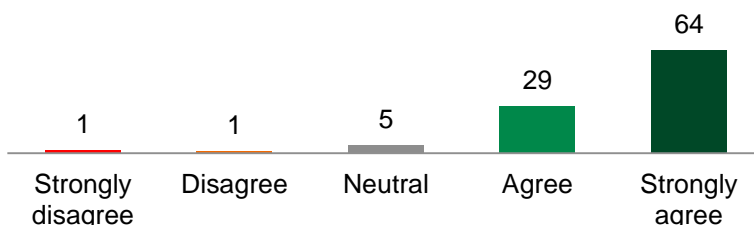
5 It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education

5.1 Level of Agreement

93% 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 4.5 out of 5.0 and the Agreement Index Score is 88 out of 100.

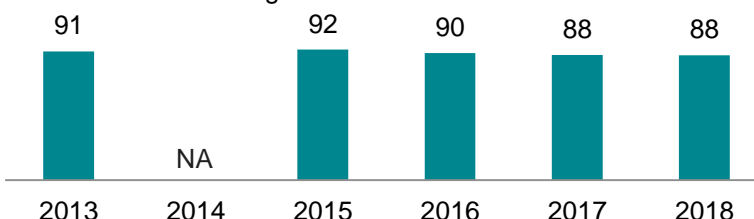
Figure 5: Overall Ratings
% of respondents



5.2 Trend Analysis

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

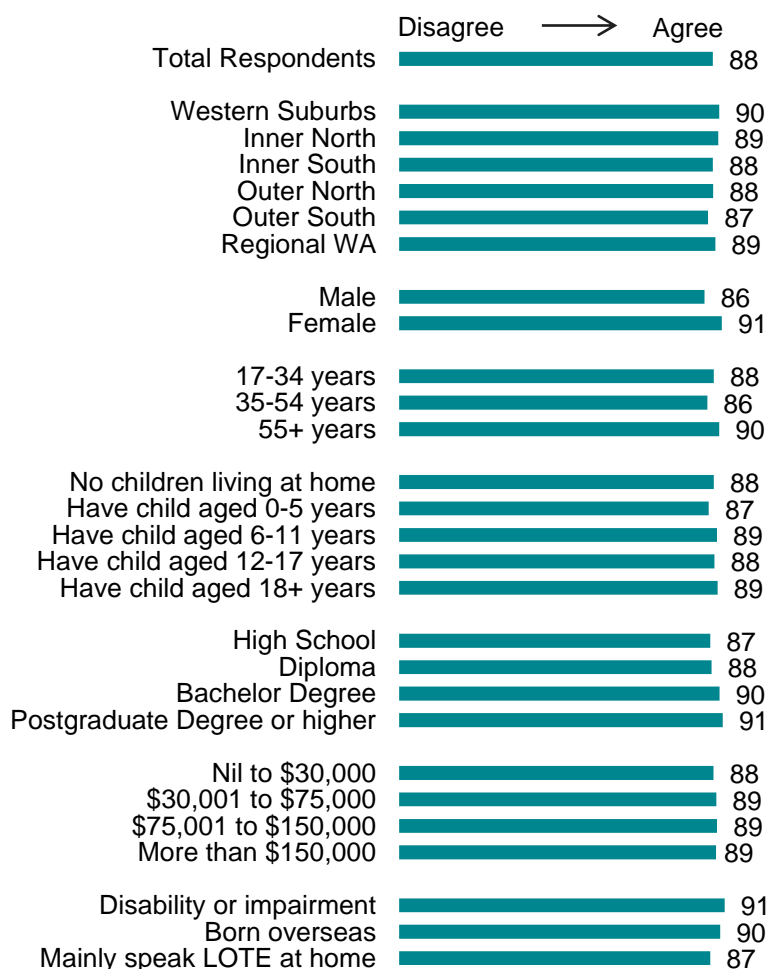
Figure 6: Trend Analysis
Agreement Index Score



5.3 Community Variances

The Agreement Index Score is consistently high across the community (see Figure 7).

Figure 7: Community Variances
Agreement Index Score



Q3. 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 = 994) NB: 2% of all respondents answered ‘unsure’

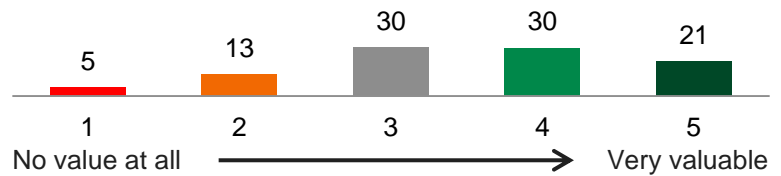
6 Perceived value of arts and culture for individuals

6.1 Overall Ratings

When asked ‘how valuable is the role of arts and culture in your life?’ 51% of respondents rate value highly (see Figure 8).

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

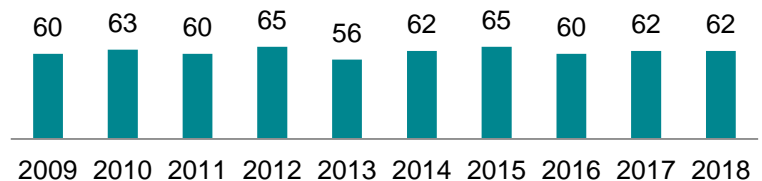
Figure 8: Overall Ratings
% of respondents



6.2 Trend Analysis

At 62, the Value Index Score remains consistent with last year. The lowest rating was 56 in 2013 and the highest score of 65 was achieved in 2012 and 2015 (see Figure 9).

Figure 9: Trend Analysis
Value Index Score

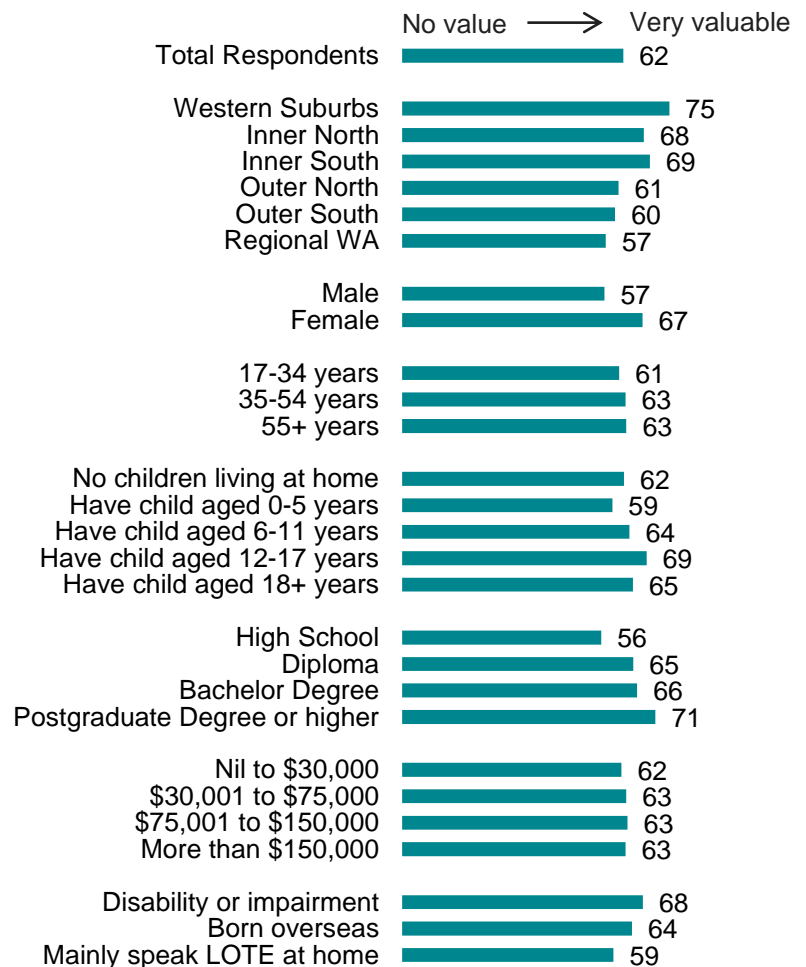


6.3 Community Variances

Perceived value is higher among females, those with higher levels of education and people who live in inner metropolitan suburbs (see Figure 10).

Perceived value is lowest among males, those with lower levels of education and in regional WA.

Figure 10: Community Variances
Value Index Score



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

Base: All respondents, excludes unsure (n = 982) NB: 3% of all respondents answered ‘unsure’

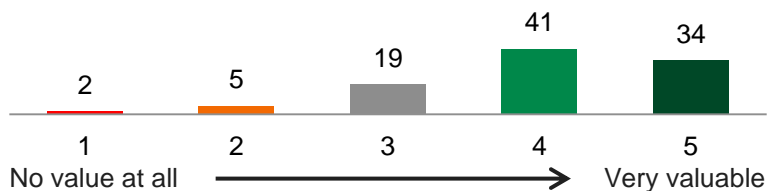
7 Perceived value of arts and culture for the community

7.1 Overall Ratings

When asked ‘how valuable do you think the role of arts and culture is in the community?’ 74% of respondents rate value highly (see Figure 11).

The mean score is 4.0 out of 5.0 and the Index Score is 75 out of 100.

Figure 11: Overall Ratings
% of respondents



7.2 Trend Analysis

At 75, the Value Index Score is the highest score achieved over the past 10 years (see Figure 12).

Figure 12: Trend Analysis
Value Index Score

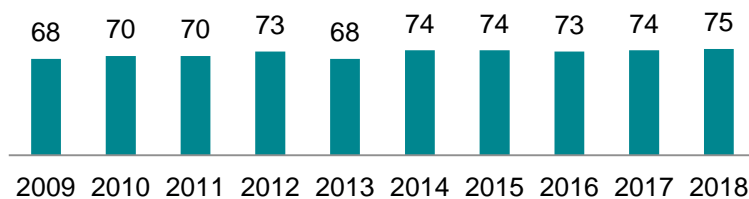
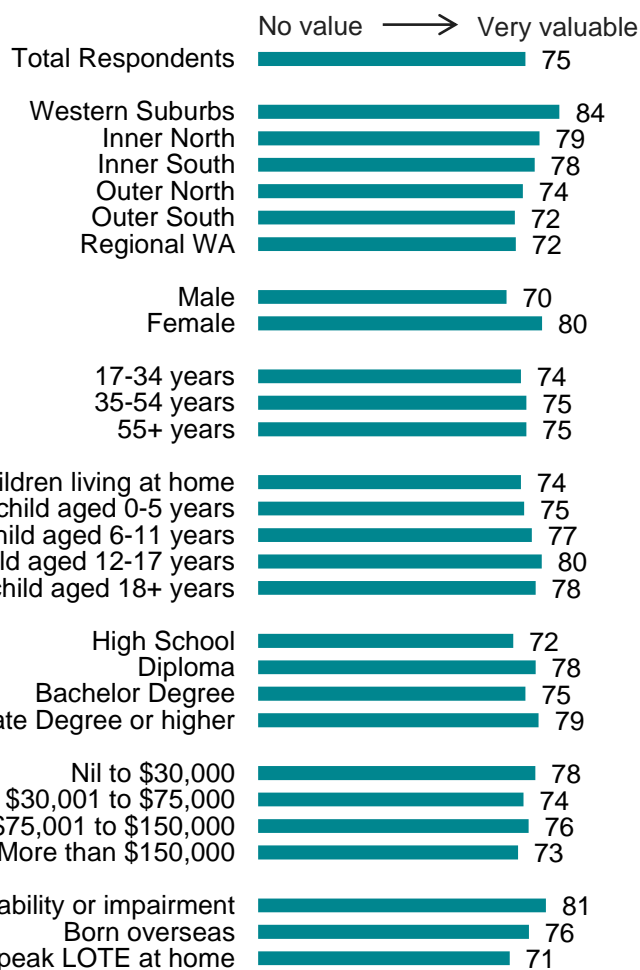


Figure 13: Community Variances
Value Index Score



7.3 Community Variances

Perceived value is highest among those living in the Western Suburbs. It is also higher among females and those with a disability or impairment (see Figure 13).

It is lowest among males and those who speak a language other than English at home.

Q4c. How valuable do you think the role of arts and culture is in the community?

Base: All respondents, excludes unsure (n = 970) NB: 4% of all respondents answered ‘unsure’

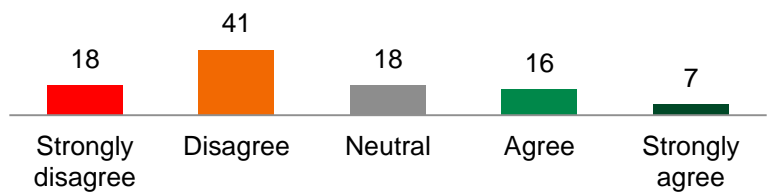
8 The arts only helps those people who participate, not the broader community

8.1 Level of Agreement

Only 23% of respondents agree “the arts only helps those people who participate, not the broader community”. 77% feel neutral or disagree with the statement (see Figure 14).

The mean score is 2.5 out of 5.0 and the Index Score is 38 out of 100 (falling between neutral and disagree).

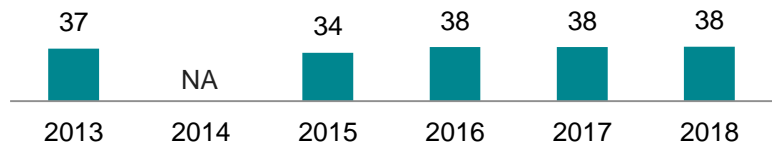
Figure 14: Overall Ratings
% of respondents



8.2 Trend Analysis

The Agreement Index Score has remained fairly steady over recent years ranging between 34 and 38 (see Figure 15).

Figure 15: Trend Analysis
Agreement Index Score

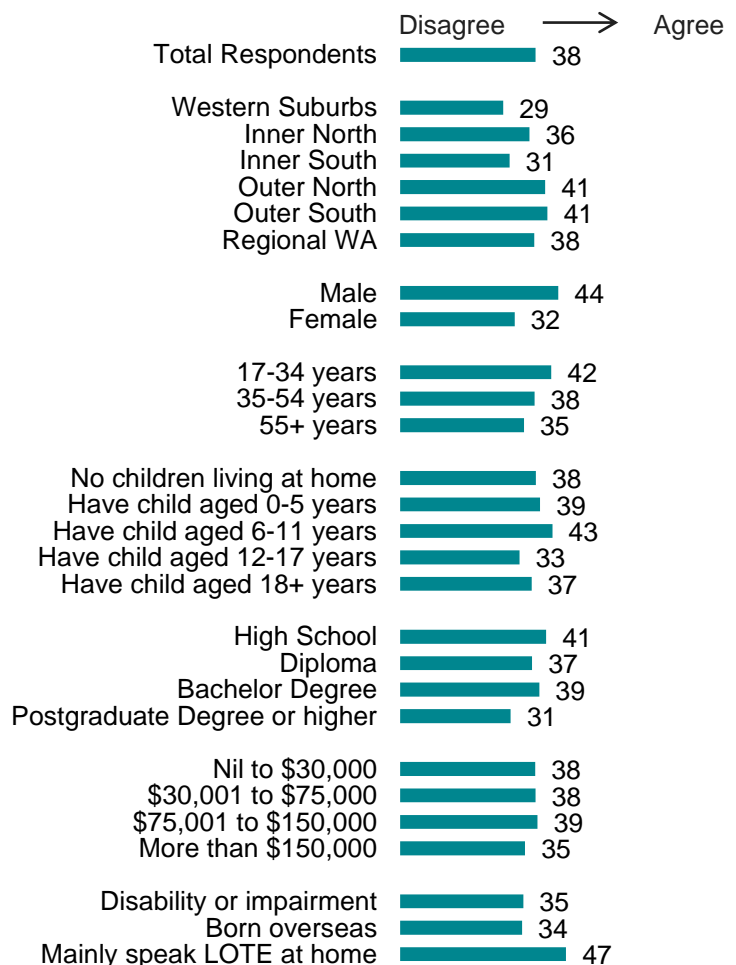


8.3 Community Variances

Females, those living in the Western Suburbs and Inner South Suburbs, and people with higher levels of education are more likely to disagree (see Figure 16).

Males and people who mainly speak a language other than English are more likely to agree.

Figure 16: Community Variances
Agreement Index Score



Q3. 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 = 973) NB: 4% of all respondents answered 'unsure'

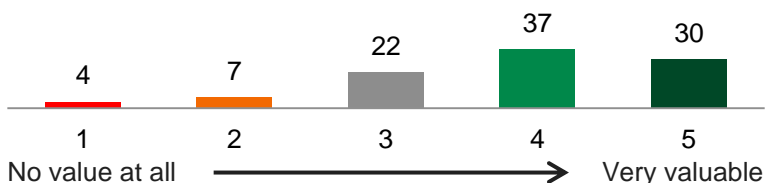
9 Value of arts and culture's contribution to creating a sense of community in WA

9.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA?' 67% of respondents rate value highly (see Figure 17).

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

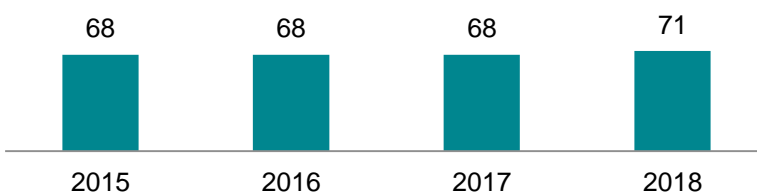
Figure 17: Overall Ratings
% of respondents



9.2 Trend Analysis

The Value Index Score has increased 3 index points since 2017 (see Figure 18).

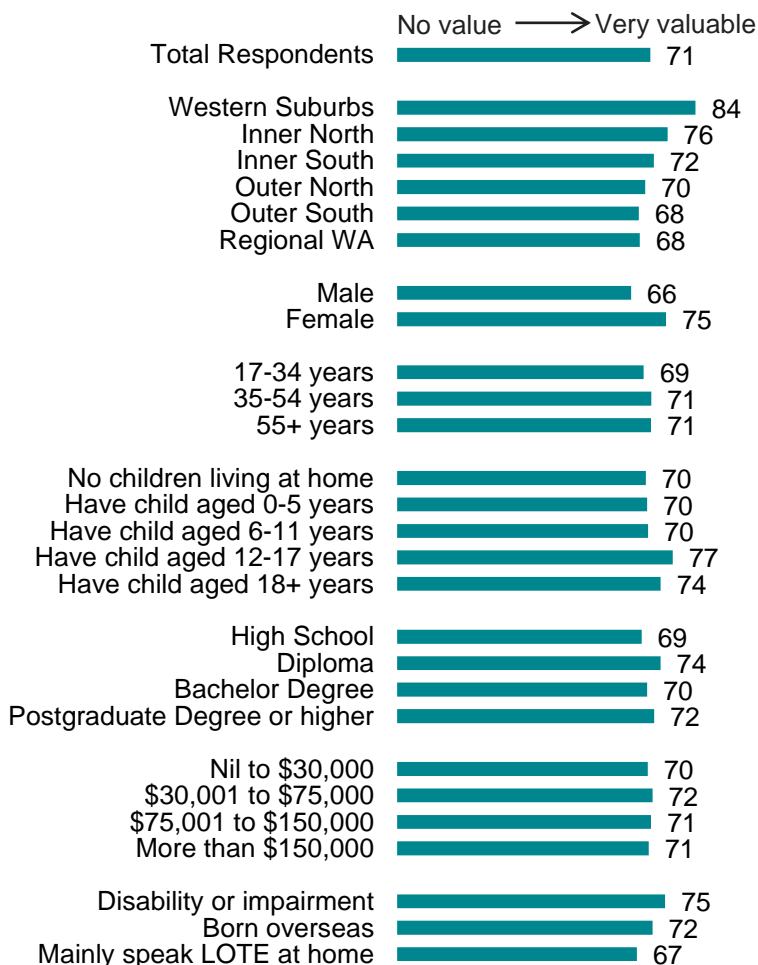
Figure 18: Trend Analysis
Value Index Score



9.3 Community Variances

Perceived value is highest among people living in the Western Suburbs. It is also higher among females, people with children aged 12-17 years and people with a disability or impairment (see Figure 19).

Figure 19: Community 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 = 955) NB: 6% of all respondents answered 'unsure'

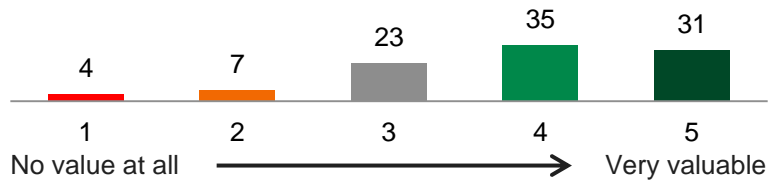
10 Value of arts and culture's contribution to creating a sense of identity in WA

10.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to the identity of the state?' 66% of respondents rate value highly (see Figure 20).

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

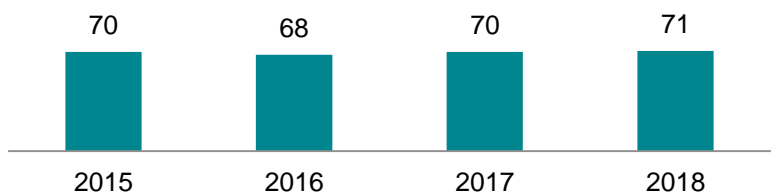
Figure 20: Overall Ratings
% of respondents



10.2 Trend Analysis

The Value Index Score has increased marginally year on year since 2016 (see Figure 21).

Figure 21: Trend Analysis
Value Index Score

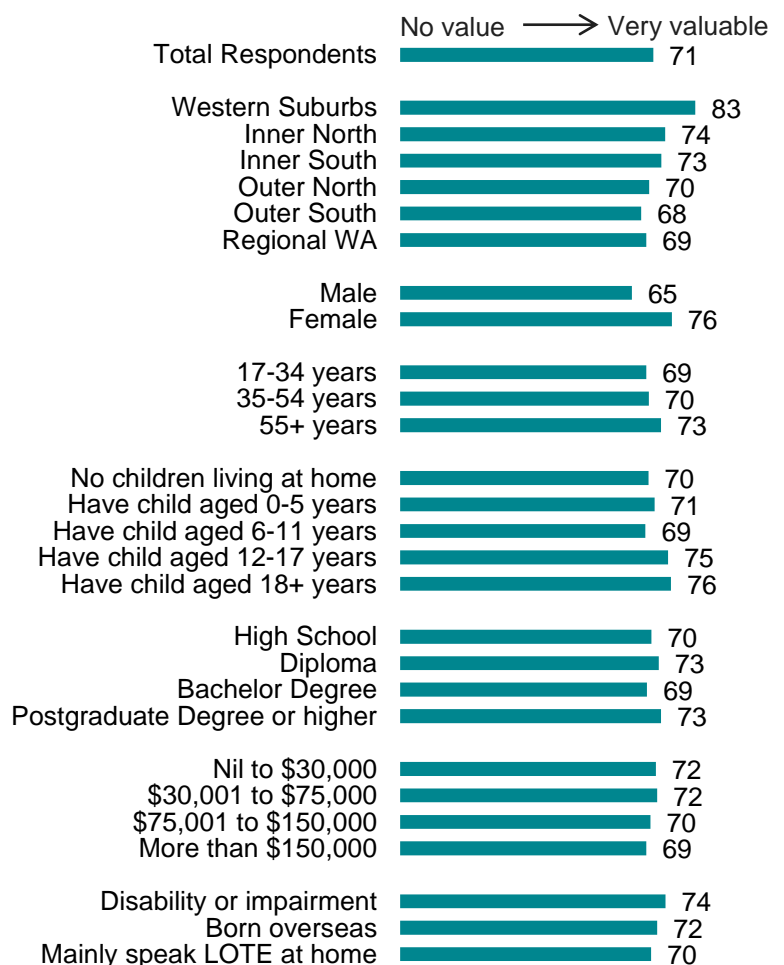


10.3 Community Variances

Perceived value is highest in the Western Suburbs.

Perceived value is lowest among males (see Figure 22).

Figure 22: Community 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 = 953) NB: 6% of all respondents answered 'unsure'

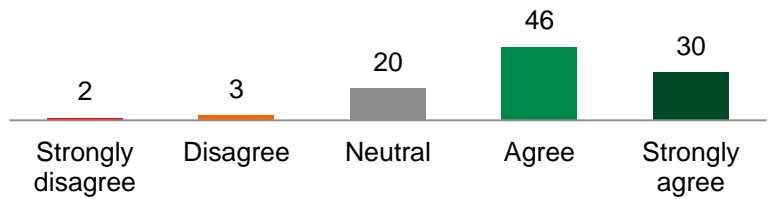
11 The arts make me feel good

11.1 Level of Agreement

75% of respondents agree or strongly agree with the statement “The arts make me feel good” (see Figure 23).

The mean score is 4.0 out of 5.0 and the Index Score is 75 out of 100.

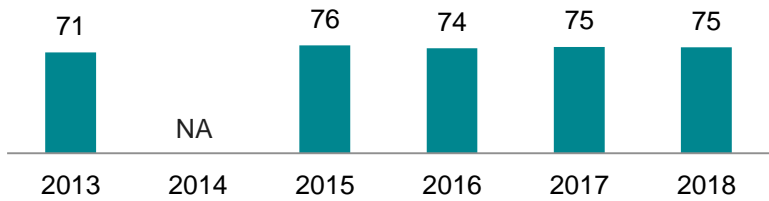
Figure 23: Overall Ratings
% of respondents



11.2 Trend Analysis

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

Figure 24: Trend Analysis
Agreement Index Score

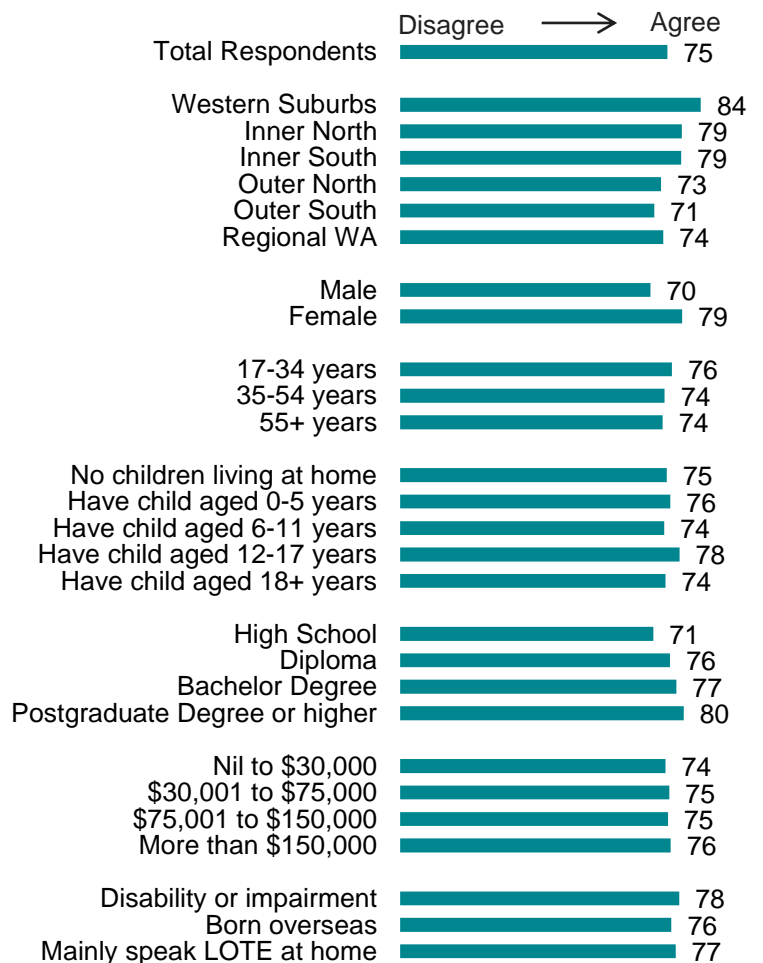


11.3 Community Variances

Level of agreement is higher in the Western Suburbs and among those with a postgraduate degree or higher (see Figure 25).

Males are least likely to agree.

Figure 25: Community 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 = 993) NB: 2% of all respondents answered 'unsure'

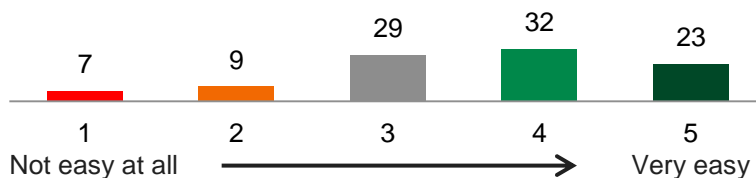
12 Ease of accessing or participating in arts and cultural activities in WA

12.1 Overall Ratings

56% of respondents believe it is easy to access or participate in arts and cultural activities in WA (rating ease of access in the top 2 boxes) (see Figure 26).

The mean score is 3.6 out of 5.0 and the Index Score is 64 out of 100.

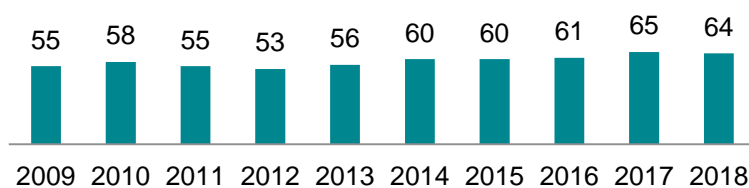
Figure 26: Overall Ratings
% of respondents



12.2 Trend Analysis

The Ease of Access Index Score is up from a low of 53 in 2012 and on par with last year's high score of 65 (see Figure 27).

Figure 27: Trend Analysis
Ease of Access Index Score

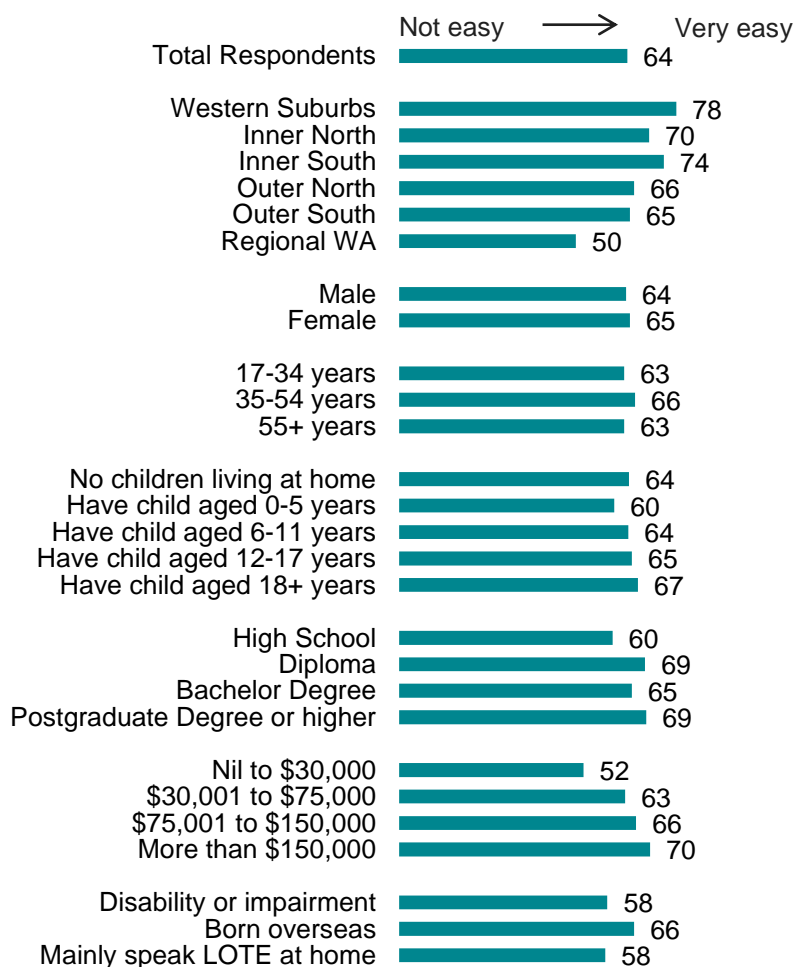


12.3 Community Variances

Ease of access is highest in the Western Suburbs and improves with level of income; moving from an Index Score of 52 among households that earn up to \$30,000 per year to an index score of 70 among high income earning households (earning more than \$150,000 per year).

Access is most difficult in regional WA. It is also more difficult for those with a disability or impairment and people who speak a language other than English (see Figure 28).

Figure 28: Community 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 = 938) NB: 7% of all respondents answered 'unsure'

13 Frequency of attendance or participation in arts and cultural activities in WA

Annual participation in the arts is relatively steady with 78% of respondents having attended or participated in an arts and cultural activity over the past 12 months. However, levels of monthly participation are down to 39% from 50% in 2014 and quarterly participation has dropped to 65% of respondents from 73% in 2015. The percentage of respondents who have not attended or participated in any arts or cultural activities over the past two years has risen to 15% this year from 9% in 2016 (see Figure 29).

Figure 29: **Frequency of attending / participating in the arts**
% of respondents

	2013	2014	2015	2016	2017	2018	Trend
At least once in past month	49	50	49	47	40	39	▼
At least once in past 3 months	63	69	73	69	66	65	▼
At least once in past year	81	82	81	80	80	78	▼
At least once in past 2 years	86	89	87	91	87	85	▼
Not at all in past 2 years	12	11	13	9	13	15	▲

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?

Base: All respondents, excludes unsure (n = 976)

The most popular frequency of participating in arts and cultural activities continues to be once every 2 to 3 months (27% of respondents), followed by once a month (21% of respondents) (see Figure 30).

Figure 30: **Frequency of participating in the arts | detailed analysis**
% of respondents

	2015	2016	2017	2018	Trend
12+ times over past 3 months (around once a week or more)	11	5	5	5	=
5-11 times over past 3 months (around 2 or 3 times a month)	17	19	15	13	▼
3-4 times over past 3 months (around once a month)	22	23	20	21	=
1-2 times over past 3 months (around once every 2 to 3 months)	23	23	26	27	▲
2+ times over past 2 years	8	11	14	13	=
1 time over the past 2 years	6	11	7	7	=
Not at all in the past 2 years	12	9	13	15	▲

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?

Base: All respondents, excludes unsure (n = 976)

Frequent participation (attended 5+ times in the past 3 months) is more likely among Western Suburbs residents, those with higher levels of education and on higher incomes (over \$150k per year) (see Table 2).

Attendance and participation is lower among seniors, low income earners, those where their highest level of education is a high school leaving certificate and people living in regional WA.

Table 2: **Frequency of participating in the arts | community variances**

% of respondents	5+ times in past 3 months	3-4 times in past 3 months	1-2 times in past 3 months	Less often	Never
Total respondents	18	21	27	19	15
Western Suburbs	37	24	25	7	7
Inner North	23	24	27	19	7
Inner South	22	30	25	12	11
Outer North	16	17	28	21	18
Outer South	16	19	28	22	16
Regional WA	12	22	25	20	21
Male	15	21	24	21	19
Female	20	21	29	18	11
17-34 years	16	24	29	21	10
35-54 years	17	22	26	19	16
55+ years	20	17	26	18	20
No children living at home	19	20	26	19	16
Have child aged 0-5	13	21	31	22	13
Have child aged 6-11	16	22	29	20	14
Have child aged 12-17	17	31	25	16	12
Have child aged 18+	16	22	25	17	19
High School	10	17	23	24	26
Diploma	18	23	25	22	12
Bachelor Degree	22	27	29	14	9
Postgraduate Degree or higher	27	24	31	15	3
Nil to \$30,000	12	17	22	28	21
\$30,001 to \$75,000	17	23	28	18	14
\$75,001 to \$150,000	19	21	29	21	11
More than \$150,000	24	24	31	13	8
Disability or impairment	19	20	20	26	14
Born overseas	20	24	26	17	14
Mainly speak LOTE at home	17	20	26	22	16

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?**

Base: All respondents, excludes unsure (n = 976)

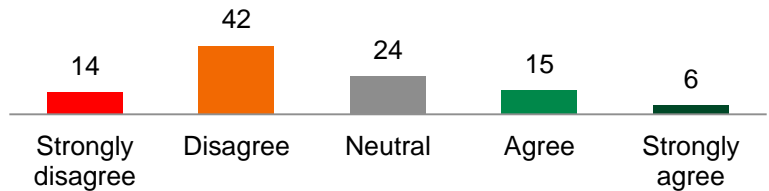
14 Few people agree that arts companies should rely on ticket sales alone

14.1 Level of Agreement

Only 20% of respondents agree with the statement “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”. 56% disagree with this statement (see Figure 31).

The mean score is 2.6 out of 5.0 and the Index Score is 39 out of 100.

Figure 31: Overall Ratings
% of respondents



14.2 Trend Analysis

The Agreement Index Score has increased marginally year on year, from 34 to 39 over the past six years (see Figure 32).

Figure 32: Trend Analysis
Agreement Index Score

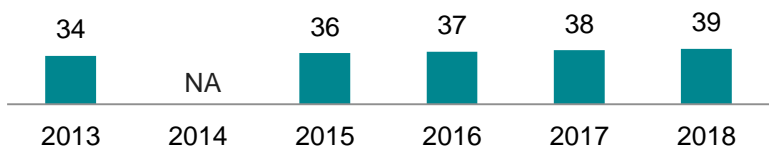
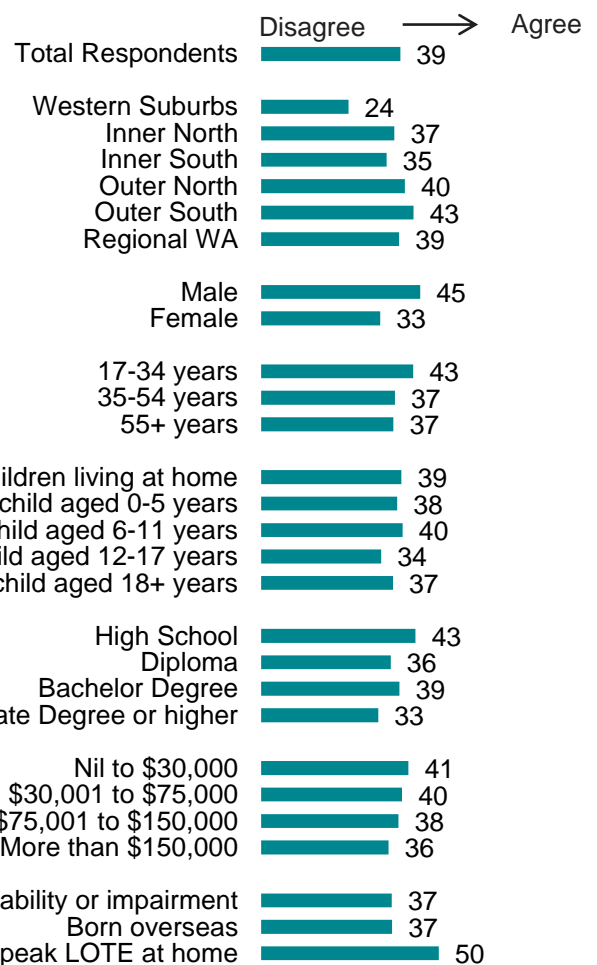


Figure 33: Community Variances
Agreement Index Score



14.3 Community Variances

Respondents in the Western Suburbs are most likely to think arts companies should receive other forms of financial support.

Males and those who speak a language other than English at home are most likely to agree that arts companies should rely on ticket sales alone (see Figure 33).

Q3. 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 = 940) NB: 7% of all respondents answered ‘unsure’

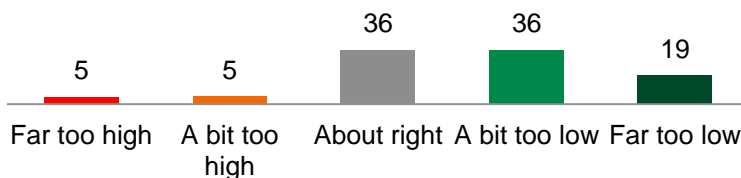
15 Perceptions of WA Government's allocation of just under \$2 per week for arts and cultural activities, services & facilities

15.1 Level of Agreement

When asked whether \$2 per person per week in allocation by WA Government for arts and cultural activities was too low, about right or too high, 55% thought it was too low (see Figure 34).

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

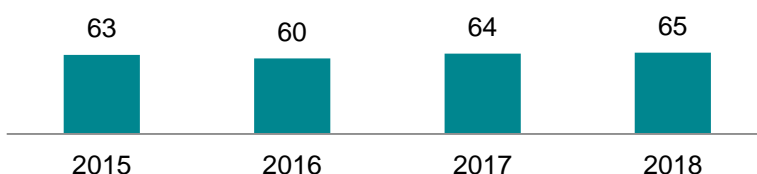
Figure 34: Overall Ratings
% of respondents



15.2 Trend Analysis

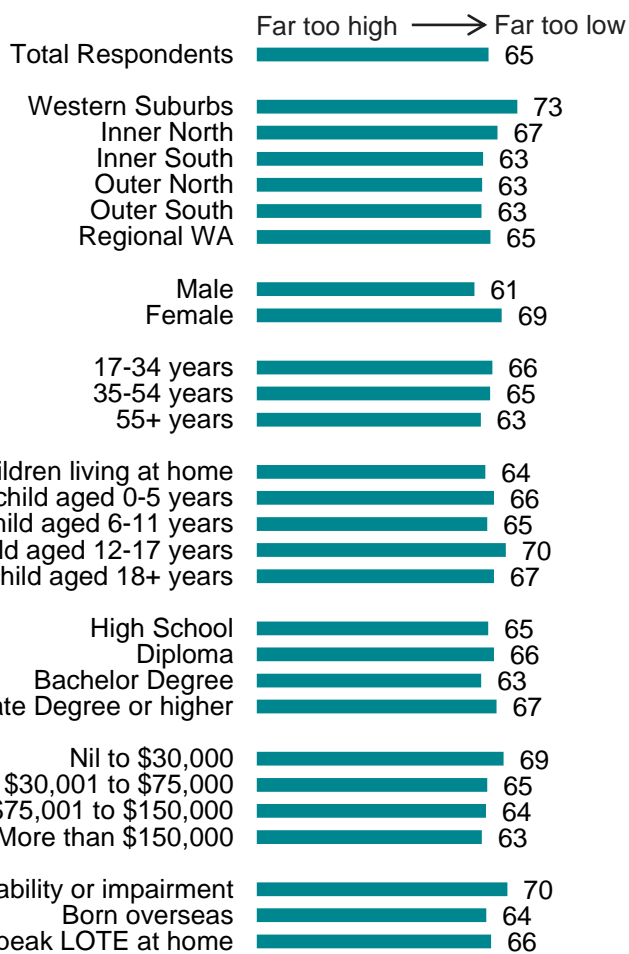
The Funding Allocation Index Score has remained steady (see Figure 35). On average, respondents give a rating between 'about right' and 'a bit too low'.

Figure 35: Trend Analysis*
Funding Allocation Index Score



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

Figure 36: Community Variances
Funding Allocation Index Score



15.3 Community Variances

Residents in the Western Suburbs, families with children aged 12-17 years and households where someone is affected by a disability or impairment are more likely to feel that \$2 per person per week in arts allocation is too low (see Figure 36).

Q6a¹. Just under \$2 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?

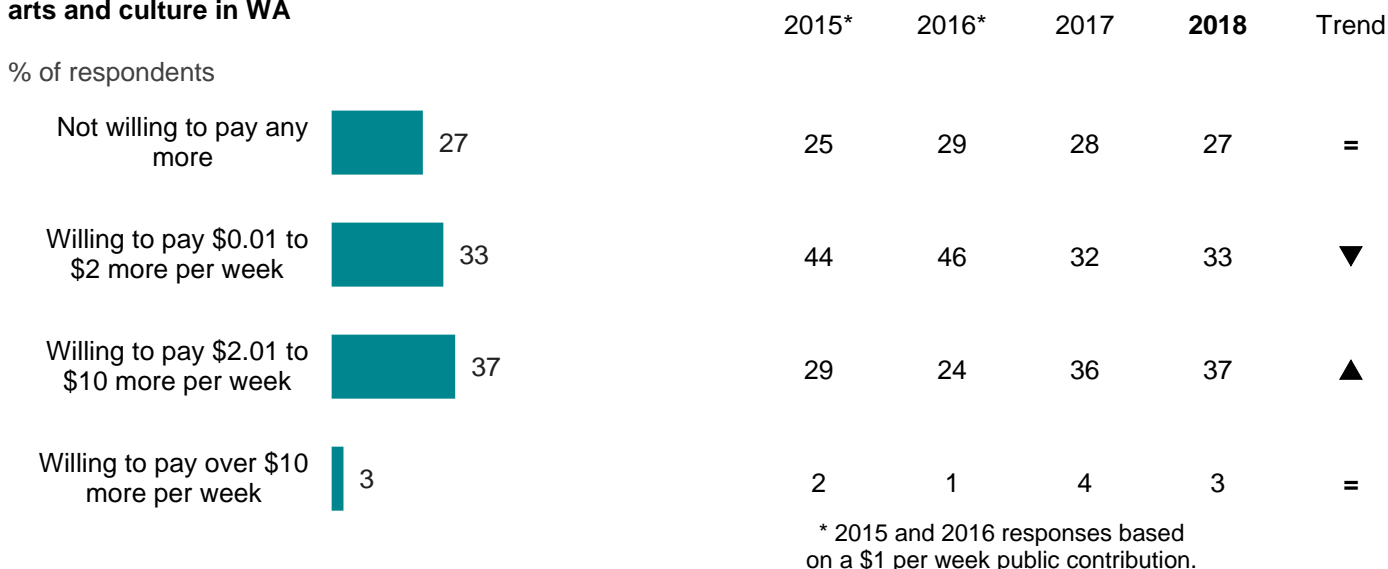
Base: All respondents, excludes unsure (n = 861) NB: 15% of all respondents answered 'unsure'

1. Total Western Australian Government funding of \$100.75 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 2015-16. Population data from ABS Cat. 3101.0 - Australian Demographic Statistics, Jun 2016: www.abs.gov.au/ausstats/abs@.nsf/mf/3101.0

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

73% of respondents would be willing to pay more to improve access to arts and culture in WA. An increasing proportion would be willing to pay over \$2 more per week.

Figure 37: Willingness to pay more to improve access to arts and culture in WA



Willingness to pay over \$2 extra or more for arts and culture spending is highest among those living in the Western and Inner South suburbs, younger adults, those with younger children and those who speak a language other than English at home. It is lowest in regional WA, among males and those aged 35+ years.

Table 3: 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	27	33	37	3
Western Suburbs	17	33	48	3
Inner North	24	34	38	5
Inner South	22	29	46	3
Outer North	26	36	34	4
Outer South	30	34	33	3
Regional WA	31	30	37	2
Male	31	30	35	5
Female	23	36	39	2
17-34 years	20	34	43	4
35-54 years	31	32	33	4
55+ years	31	34	34	2
No children living at home	28	34	34	4
Have child aged 0-5	19	32	46	3
Have child aged 6-11	22	38	37	3
Have child aged 12-17	22	34	39	5
Have child aged 18+	32	29	37	3
High School	30	29	39	2
Diploma	24	39	34	3
Bachelor Degree	29	34	35	3
Postgraduate Degree or higher	19	32	40	8
Nil to \$30,000	25	34	39	2
\$30,001 to \$75,000	24	32	39	4
\$75,001 to \$150,000	28	31	38	4
More than \$150,000	24	42	32	2
Disability or impairment	20	36	39	5
Born overseas	25	37	36	3
Mainly speak LOTE at home	25	25	34	16

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 = 861) NB: 15% of all respondents answered 'unsure'

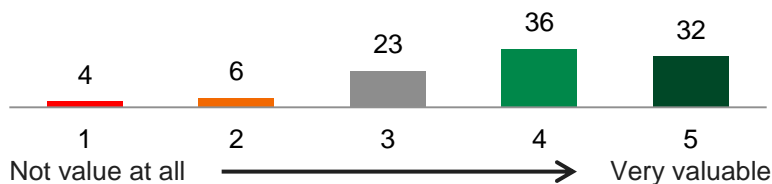
17 Value of WA film and television industry

17.1 Overall Ratings

When asked 'how valuable do you think the WA film and television industry is to the community', 68% rate value highly (see Figure 38).

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

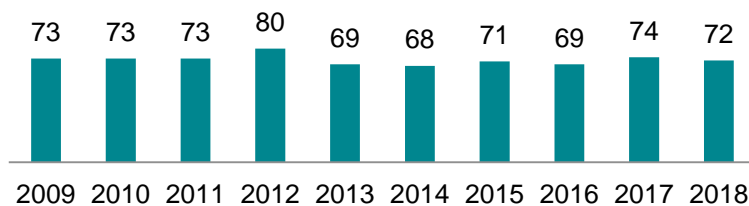
Figure 38: Overall Ratings
% of respondents



17.2 Trend Analysis

The Value Index Score has fluctuated between 68 and 80 over the past 10 years. It is currently sitting at 72 (see Figure 39).

Figure 39: Trend Analysis
Value Index Score

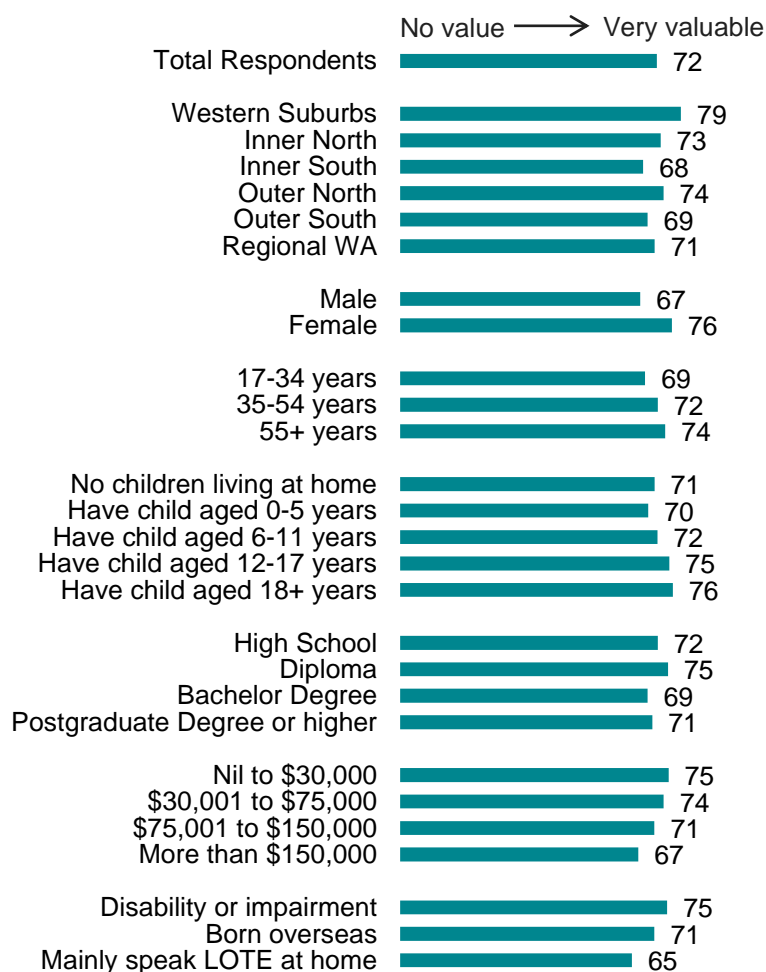


17.3 Community Variances

Perceived value is highest in the Western Suburbs. It is also higher among females, people with older children, those with a disability or impairment and among people living in low income earning households.

Perceived value of the WA film and TV industry is lower among males, those with higher levels of household income and people who speak a language other than English at home (see Figure 40).

Figure 40: Community 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 = 966) NB: 5% of all respondents answered 'unsure'

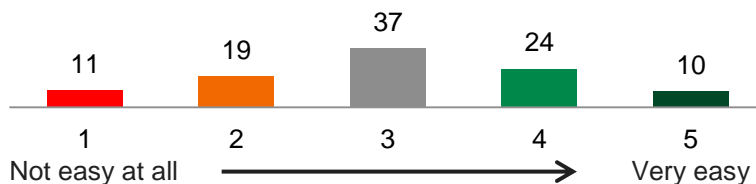
18 Accessibility of WA film and television productions

18.1 Overall Ratings

When asked “how easy is it for you to access Western Australian produced film and television productions?” 33% rated ease of access highly (see Figure 41).

The mean score is 3.0 out of 5.0 and the Index Score is 51 out of 100.

Figure 41: Overall Ratings
% of respondents



18.2 Trend Analysis

The Ease of Access Index Score dropped 10 Index points from a high of 61 last year, however, it is slightly higher than earlier years (see Figure 42).

Figure 42: Trend Analysis
Ease of Access Index Score

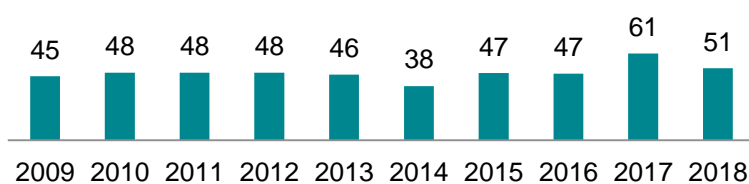
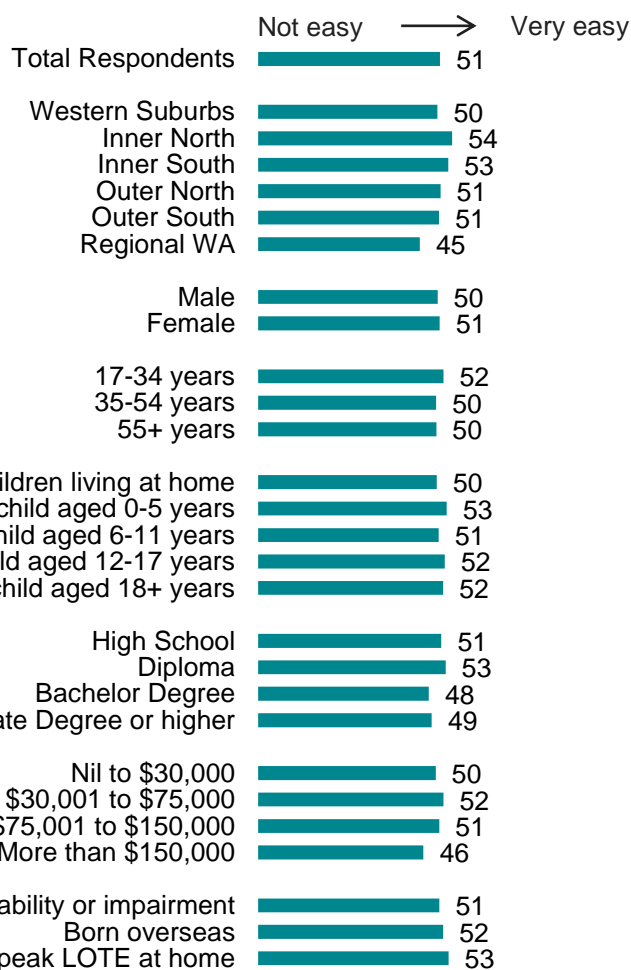


Figure 43: Community Variances
Ease of Access Index Score



18.3 Community Variances

Ease of access continues to be lower across regional WA (see Figure 43).

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

Base: All respondents, excludes unsure (n = 862) NB: 15% of all respondents answered 'unsure'

19 Appendix 1 | 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?
- Q2. 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. 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?
- Q3. 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. 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. Just under \$2 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
- Q4a. 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".
- Q4b. 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".

Demographics

- D1. Age
- D2. Gender
- D3. Residential postcode
- D4. Do you have any children living at home aged: 0-5 years; 6-11 years; 12-17 years; 18+ years; No children; or, Refused
- D5. What is your highest level of education? High School Leaving Certificate; Diploma or Advanced Diploma; Bachelor Degree; Postgraduate Degree or higher; Other; or, Refused
- D6. 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
- D7. 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