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## ***SEGMENTATION ANALYSIS OF WA ARTS USAGE AND ATTITUDES***

***PREPARED FOR: DEPARTMENT OF CULTURE AND THE ARTS***

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***DATE: AUGUST 2012***

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Appendix A – Questionnaire

Appendix B – Data Analysis Tables

## **1.0 SNAPSHOT**

This document reports on the analysis of a longitudinal series of surveys designed to track the Western Australian community's participation in and attitudes towards culture and the arts. It is based on a set of five annual independent surveys, conducted over the period of 2007 to 2011 inclusive.

Each iteration of the series was based on a sample of 400 quota controlled random dial telephone interviews conducted with adults resident in Western Australia – 2018 interviews in total. The sampling for each iteration was structured to reflect the approximate age and gender profile of the adult population, as defined by the 2006 Census. The accumulation of random samples over five years produced a sample of 2018 interviews, which produces a theoretical survey error of +/- 2% at the 95% confidence level.

## **2.0 EXECUTIVE SUMMARY**

### **2.1 KEY FINDINGS**

The exercise has produced a set of five segments based on their attitudes towards and exposure to the various elements of culture and the arts. The five segments are described in detail in section three. They are:

1. The "Advocates" (16% of respondents)
2. The "Culturalists" (15% of respondents)
3. The "Casuals" (34% of respondents)
4. The "Ambivalents" (12% of respondents)
5. The "Disinterested" (24% of respondents)

It is interesting that all but the "Disinterested" segments showed very favourable attitudes towards culture and the arts, in terms of supporting government investment, the benefits of exposure in school programs and the notions that the arts "make me feel good" and "help us understand our culture".

Whilst the "Advocates" and "Culturalists" showed the greatest levels of involvement in arts activities, we believe that the "Casuals" segment shows the greatest potential for increased activity in attendance at arts performances and events. They are the largest segment, and display positive attitudes towards the arts, though with relatively modest levels of involvement in the arts compared to the most active segments – the "Advocates" and "Culturalists". Compared to the other segments they appear to be quite likely to be influenced by promotions through the social media and the internet generally.

## **3.0 RESEARCH APPROACH**

This report is an analysis of the Department of Culture & Arts community attitudes tracker data file. The data was accumulated in annual consumer surveys, each of a sample of 400 respondents. The surveys from the years 2007 through until 2011 inclusive were combined into one data file of the results to questions which were common to the five survey periods. The total sample of 2018 respondents produced the opportunity to conduct a latent class segmentation analysis based on arts attitudes and behaviours.

### **3.1 OBJECTIVES**

The project objectives were to create a segmentation of the WA adult community based on their attitudes towards and involvement in the various arts forms, ranging from the cinema to live performance such as the WA Ballet, live theatre, classical and other music concerts, dance, Opera, Cabarets, or a literature or poetry event.

### **3.2 METHOD**

The original research was carried out as a series of five independent telephone surveys, conducted one in each year from 2007 to 2011 inclusive. Each survey of a 400 sample was conducted as a stand alone snapshot of the adult (18+) WA community in terms of age, gender and location using Patterson's well established public opinion polling program.

The fieldwork was carried out by Patterson's related fieldwork company West Coast Field Services from their dedicated telephone room based in Applecross, WA.

All calls were made using WCFS dedicated Computer Assisted Telephone Interviewing software; SurveyCraft. All interviewers were fully brief as to the nature of the project and the questionnaire-specific instructions prior to commencing data collection.

#### *3.2.1 FIELDWORK DETAILS*

Certain aspects of the survey questionnaire had been modified over time to reflect the particular needs of the survey in each year. The questions which were common to each of the five surveys used for the analysis were extracted from the data files and accumulated into the one data set of some 2018 respondents. For a final copy of the questionnaire that was used for the analysis, the reader is referred to Appendix B.

### **3.3 LIMITATIONS**

The sample of 2018 respondents provides an overall theoretical survey error of +/- 2% at the 95% confidence level. More importantly, it enables the sample to be segmented into sub sets of 12% to 34% of the whole, producing segment samples ranging from the smallest segment of 245 respondents, up to the largest segment of 685 respondents. The survey errors for each of these segments therefore ranged from +/- 6.5% down to +/- 3.7% at the 95% confidence level.

### **3.4 DATA PROCESSING AND ANALYSIS**

As a means of ensuring the highest quality of data, WCFS routinely validate a proportion of all data. Effectively this means a random selection of respondents are re-contacted and their recorded responses are checked to ensure the most accurate recording of data is upheld by the field team at all times.

Post data collection, the data was weighted according to the latest census data available from the Australian Bureau of Statistics (ABS). Patterson Research Group routinely weights data to ensure that the sample profile most closely represents to true profile of the adult WA population, in terms of age gender and location.

The final data set was analysed using Patterson Research Group's dedicated survey analysis software; Q, the result of which are quantitative data tables. The data tables form the basis of this report and have been included in Appendix B.

## 4.0 THE FIVE SEGMENT DESCRIPTIONS

The segmentation was conducted on a series of attitude statements regarding culture and the arts, and behaviours with respect to attendance to various arts events. The attitude statements were a simple five point Likert agree/disagree scale for the following statements:

Q8	Could you please tell me your level of agreement with each of the following statements concerning the arts ( a 5 point Likert Agree / Disagree scale was applied)
	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, painting, writing, drama, media training etc, as part of their education
	The arts have an important role in helping us understand our own culture and way of life, and those of others.
	The arts helps me connect with and feel a part of my community
	The arts make me feel good.
	All theatres, 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
The following questions also used a 5 point Scale, ranging from “No value at all”, up to “Very Valuable”	
Q9a	How valuable is the role of arts and culture in your life?
Q9b	How valuable do you think the role of arts and culture is in the community?
Q9c	How easy do you think it is for the West Australian public to attend or participate in arts and cultural activities?
Q10	Have you seen any of these film and television productions in the last 12 months?
Q11a	How valuable do you think the Western Australian film and television industry is to the community?
Q11b	How easy do you think it is to view Western Australian produced film and television productions?

The responses to the above range of questions formed the basis of the segmentation exercise.



This resulted in a four segment solution. A review of the data suggested a further split was warranted. An initial Culturally Aware segment seemed to have two broad divergent elements, and was split into two sub groups based on household income (up to and exceeding \$70,000 annual income before tax). The resultant five segment solution was:

- The "Advocates" (16% of respondents)
- The "Culturalists" (15% of respondents)
- The "Casuals" (34% of respondents)
- The "Ambivalents" (12% of respondents)
- The "Disinterested" (24% of respondents)

Each of these segments is described in detail below.

#### **4.1 THE "ADVOCATES" (16% OF ADULTS)**

The "Advocates" come from a broad range of regions across Perth; they show a slight over representation in the South of the River region of Perth. They have a slightly above average age category, being almost as old as the "Disinterested", with 65% aged 40 years and over. However, they are strongly female orientated (62%) with one quarter retired. They have a generally medium to low income.

Nonetheless, in spite of their relatively modest income, they manage to indulge in a significant amount of culture and arts exposure. They have a strong passion for culture and the arts, with 98% believing that the Government should support culture and the arts; virtually all indicating that the arts help them "understand our culture and that of others".

Almost 9 out of 10 believe that the arts help them "connect with and feel part of the community", and virtually all (97%) indicate that the arts "make them feel good". Eighty nine percent place a high value on culture and the arts in their life (compared to the survey average of 45%), and they would be strongly encouraged to attend more events with major international events. This is even more important than "price discounts" which, given their relatively modest income, is a further indication of the high interest in and value they place on culture and the arts.

All "Advocates" believe it is important that children are exposed to the arts in their educational programs.

The "Advocates" have significantly above average exposure to the cinema; libraries; art galleries; museums; music, whether it is classical or popular music; theatre; dance; the opera; cabarets; literature events and other arts activities.

In spite of their modest income, they have relatively high personal expenditure on the arts, with an average monthly expenditure of \$64 compared to the survey average of \$55. Just 37% of them report spending less than \$50 over an average month.

Whilst price discounts were not as important to them as major international acts or shows, their relatively modest incomes are reflected in the biggest barrier to greater cultural and arts attendance with 40% indicating that cost is the major barrier to greater involvement. This reference to cost is significantly above the survey average of 29%.

Whilst competing interests are also a barrier to greater involvement, it is less so than for the survey average. The older age profile is reflected in the finding that only 15% report that family commitments are a barrier to greater involvement in culture and the arts.

The picture that emerges is a dedicated "Advocate" with a relatively modest income, who genuinely highly values a wide range of artistic endeavour, displaying a propensity to spend a high proportion of their disposable income in indulging their interests in and passion for WA culture and the arts.

## **4.2 THE "CULTURALISTS" (15% OF ADULTS)**

The "Culturalists" demonstrate a high interest in the arts, but their motivation appears to be not as passionately driven by a love of the arts as much as it is an interest in enjoying "the finer things". The "Culturalists" have above average income, come mostly from the South of Perth, but are over represented in the Western suburbs of Perth. They spend an average of \$92 a month per person enjoying culture and the arts across a wide range of activities, and less than 1 in 3 reports spending less than \$50 over an average month on arts and culture.

The "Culturalist" has a very strong view that culture and the arts deserve Government support (98% are of this view) and also that art in education is important for children (100%). They also firmly believe that the arts help us understand our cultures, and that the arts help them understand and connect with the community. The arts make them feel good, and almost 9 out of 10 indicate that they highly value culture and the arts in their life. Over 8 out of 10 believe that the arts are of high value to the community generally.

The barriers to greater involvement in culture and the arts are competing interests, cost and then family responsibilities. They would be motivated to become even more involved with the provision of major international exhibits or events, events available in the evening, events that are available over longer opening hours, and to a lesser extent, events that have provision for children's activities.

They have a slight younger age bias, with 44% in the 18 – 39 age group (compared to 40% overall). They have a very slight female bias with a split of 45% male and 55% female, but is very close to the survey average of 51%/49%. They are less likely than the average to be a retiree, and slightly more likely than average to be in a mature lifestage.

They have high (well above average) involvement in all aspects of the arts endeavour, having above involvement in the cinema; using public libraries and art galleries and the West Australian Museum. They have double the survey average involvement in attending music concerts, double the survey average in involvement in classical music, theatre and

dance. They have three times the survey average involvement in opera, double the average in attending cabaret shows, and in attending "other" arts performances.

The main difference between the "Culturalist" and the "Advocate" is that the "Advocate" displays an even stronger emotional support for culture and the arts, and appears to be limited in their even greater exposure to culture and the arts by the costs. The "Culturalist" on the other hand has the financial capacity to attend any program that is of interest to them, and the major barrier for greater involvement is competing interests for them.

Essentially the "Advocate" focuses their relatively scarce financial resource on a wide range of culture and arts activities, whereas the "Culturalist" attends arts activities as part of a wider range of social activities, being limited in their arts exposure by the wide range of entertainment choices they have, rather than financial capacity.

### **4.3 THE "CASUALS" (34% OF ADULTS)**

About a third of adults fall into the "Casuals" category. This is a category of adults that appreciate culture and the arts, but appear to have below average attendance and involvement in many of the arts aspects. They are slightly over represented in the Northern suburbs of Perth, and whilst they show slightly above average attendance at the cinema over the course of a two to three month period, they have below average exposure to the more passive arts activities such as visiting the art gallery, or the museum, and also classical music. Their patronage of other forms of the arts follows the community average, with 14% going to live theatre at least once in the last two to three months, 10% attending a cabaret performance, 8% a dance performance and 2% the opera.

The "Casuals" have a very slightly above average income profile, but tend to be over represented in the "young family" lifestage where they have young dependent children. They are the most likely of any segment to be aged under 40 years (47%) and are equally likely to be male or female.

But it is not their lifestage that defines them as much as their low personal involvement in culture and arts, in a context of quite positive attitudes towards the arts. For example, 85% believe that the Government should invest in cultural and arts activities for the benefit of the community, and almost all believe that it is important for children to be exposed to the arts in their education, and over 8 out of 10 believe that the arts "help us understand ourselves".

Whilst almost 7 out of 10 believe that the arts "make me feel good", only a third believe that culture and the arts are important in their life.

The average expenditure per month is only \$55 per head, and the main barriers to greater involvement in culture and arts events are competing interests of other activities, the cost of attendance and family responsibilities. Just 12% report that they do not spend anything in an average month on cultural and arts activities, 44% report spending \$50 or less.

They will be most encouraged to attend programs more often if there were more headline international acts, and lower costs. They wouldn't be much motivated by longer trading hours or events available for children.

They are typically young, with family responsibilities, and while they have an interest in the arts, they do not make much time for them, apart from cinema attendance. One imagines them being somewhat limited by mortgage and childminding issues.

#### **4.4 THE "AMBIVALENTS" (12% OF ADULTS)**

The "Ambivalents" segment represents 12% of West Australian adults. Whilst it is spread reasonably evenly across Perth and Western Australia, it is slightly under represented in the Western suburbs and Northern suburbs of Perth, and slightly over represented in the country and Eastern suburbs of Perth.

The "Ambivalents" person is slightly more likely to be male than female (53% to 47%), but this is very close to the 51% - 49% split of the total sample. They tend to be aged over 40 years (65% are aged 40 years plus) which is slightly older than the survey average (60% aged 40 years plus).

Whilst not actively antagonistic towards culture and the arts, the "Ambivalents" show little affection for culture and the arts for themselves. Just 4 out of 10 believe that culture and the arts are "valuable in my life" compared to 45% of the survey average. Slightly over half of them (55%) believe that the arts are valuable in the community (compared to the average of 61%).

Having noted their "lukewarm" endorsement of the value of the arts, 9 out of 10 believe that it is important that school children have access to learn music; painting; writing; drama and other arts activities. Eight out of ten also believe that the arts can be important in helping us "understand our culture" (and that of others).

They do not appear to drive significant personal enjoyment out of the arts. Whilst 51% believe that the arts "make them feel good", this is well below the survey average of 69%. Only 41% indicate that the arts help them connect with and feel part of their community.

The "Ambivalents" have below average usage of cinema; art galleries and museums; music festivals; classical music; theatre and cabarets. They also have below average expenditure on the arts, averaging \$48 a month per person on arts and entertainment expenses. Twenty per cent claim to spend nothing at all per month on arts activities and 46% report spending less than \$50 a month.

The main barriers to arts attendance are the costs and competing interests of other activities, along with other family commitments.

In essence, the "Ambivalents" appear to be indifferent towards the arts compared to other segments with low exposure and support, for the arts, but nonetheless displaying an appreciation of the importance of the arts for the community, and for some at least, educational and uplifting.

## 4.5 THE "DISINTERESTED" (24% OF ADULTS)

The "Disinterested" segment displays quite negative sentiments towards culture and the arts. Only 12% indicate they value culture and the arts in their lives, and only 40% believe that culture and the arts are valuable for the broader community. Whilst they believe that it is important that children are exposed to the arts in their education (91%) they had the lowest proportion expressing this view (the average was 95%).

Only 27% indicated that the arts helped them "connect with their community" (compared to 55% average), and just a third (36%) indicated that the arts "make me feel good", compared to the survey average of 69%.

The "Disinterested" are over represented in the country of WA, and under-represented in the West and Northern suburbs of Perth. They have about average representation across the other regions of Perth (South and East).

They have below average exposure to all cultural and arts activities, including in their most favoured activity of attending the cinema (37% had done so within the last two to three months, but this is against the survey average of 59%).

They also have below average exposure to all other aspects of arts expression, resulting in the lowest expenditure per month on arts activities of just \$28.90. Actually, 4 out of 10 reported a zero average monthly spend on cultural and arts activities (survey average was just 18%), and a further 42% report spending less than \$50 a month.

The main barrier to attendance to any cultural and arts event is primarily a simple lack of interest. This is followed by a range of competing interests that compete for their time, and to a lesser extent cost and family ties and responsibilities.

There is not much that would encourage them to take a greater interest in culture and the arts, but the most effective inducement would be the provision of major international events or acts, which would have some impact on about a third of the "Disinterested". This figure should be seen in the context of the survey average of 69% indicating that they would be encouraged to attend more events for major international acts.

The "Disinterested" come from a wide range of age groups, generally following the adult age profile, but nonetheless having an older age group bias. They are slightly more likely than average to be retired, and had the highest proportion aged over 40 years (66%). Whilst nearly 3 in 10 have a household income above \$70,000, overall they have below average household income, with 42% having less than \$50,000 income before tax (compared to 33% of the total sample).

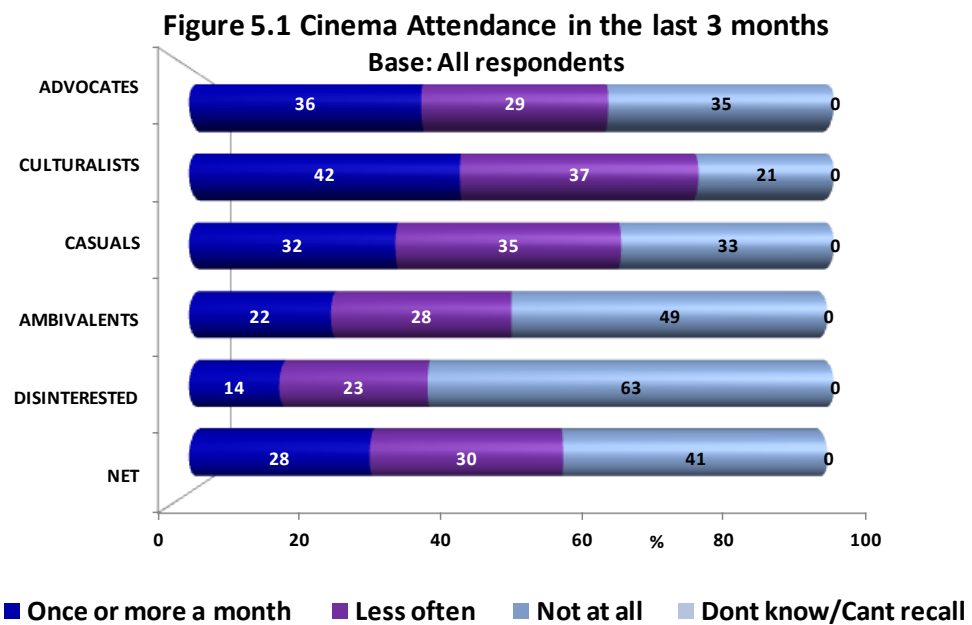
The picture that emerges is of an older retired disengaged member of the community that has little regard for or interest in most of the fields of artistic endeavour. They are predominantly male (63%) - the highest male proportion of the five segments.

## 5.0 USAGE OF ARTS GENRES

The survey established the extent to which the five segments use, visit or otherwise make use of the various elements of culture and the arts. The following graphs compare the level of usage for the five segments with the overall sample average.

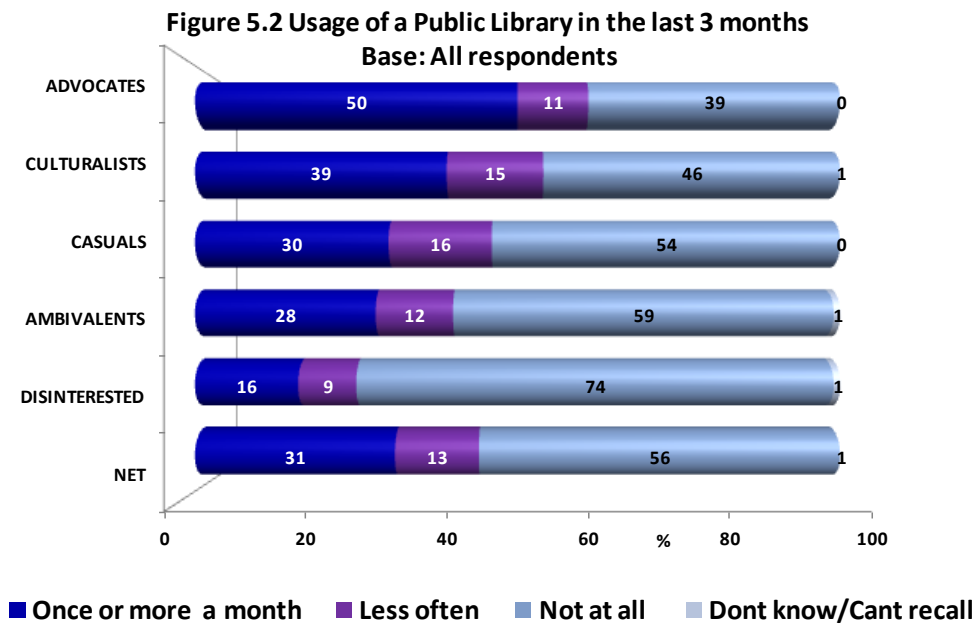
### 5.1 ATTEND THE CINEMA

Figure 5.1 below shows the 5 segments' usage of cinema over the last three months, comparing with the NET (average) for the total sample. It shows that "Culturalists" and "Advocates" have the highest attendance rates, and that the "Disinterested" group has the lowest (14% 1+ per month, compared to the survey average of 28%).



## 5.2 USAGE OF A PUBLIC LIBRARY IN THE LAST THREE MONTHS

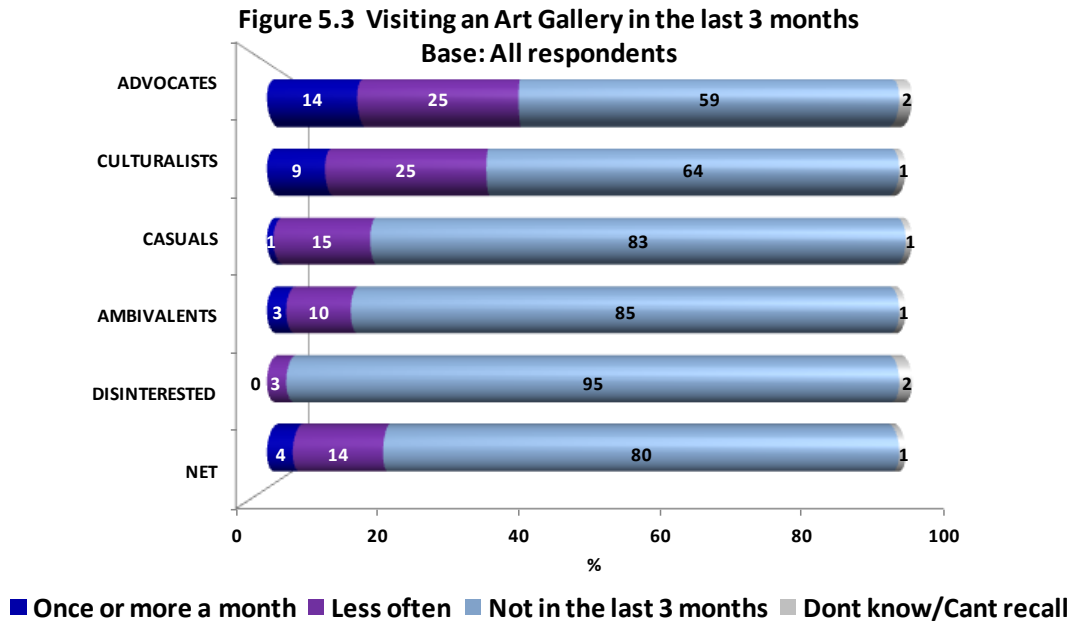
As figure 5.2 below shows, there is a material difference in usage of public libraries across the segments. Fifty per cent of “Advocates” claim to use a public library once or more a month, compared to 16% of the “Disinterested”. Overall 31% claim to have used a public library at least once a month “over the last three months”.



### 5.3 VISIT AN ART GALLERY IN THE LAST THREE MONTHS

Figure 5.3 shows 4% of respondents over all reporting visiting an art gallery once or more a month and a further 14% at least once in the last three months (18% at least once in the last 3 months). The “don’t know” proportion is 2%.

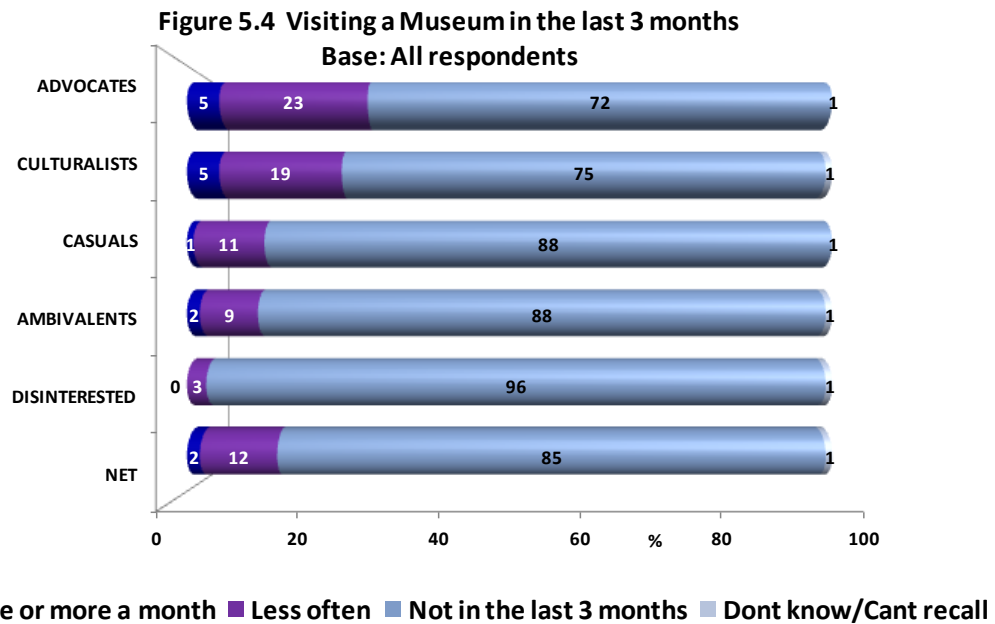
Again the “Advocates” showed the highest propensity to visit an art gallery, at a net of 39% at least once in the last three months.





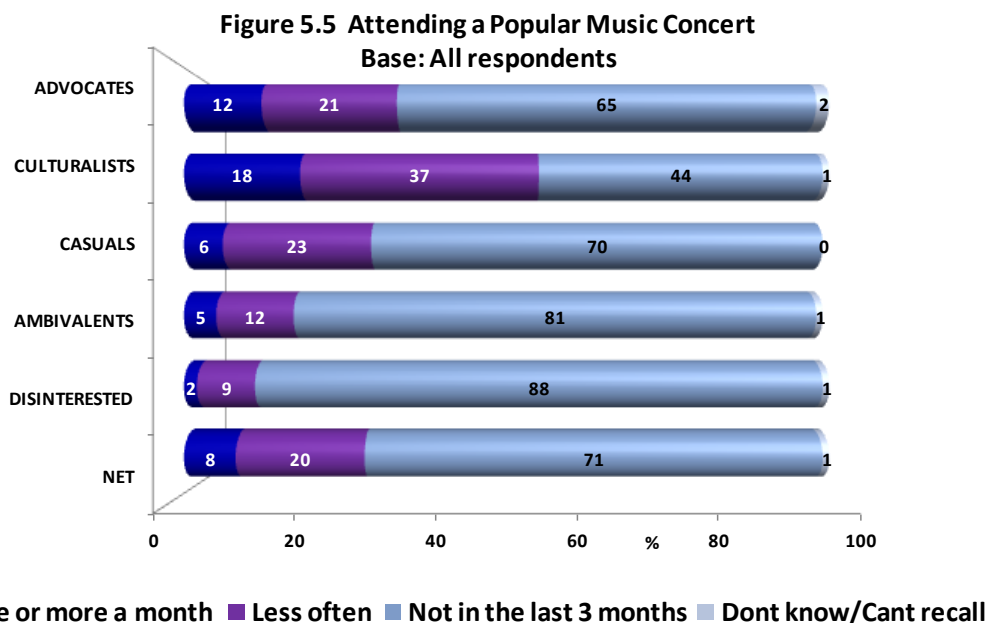
## 5.4 VISITING A MUSEUM

As figure 5.4 shows, some 15% report visiting a museum at least once in the last 3 months (3% 1+ per month, 12% less often). Some 28% of “Advocates” and 24% of “Culturalists” report visiting a museum at least once in the last three months.



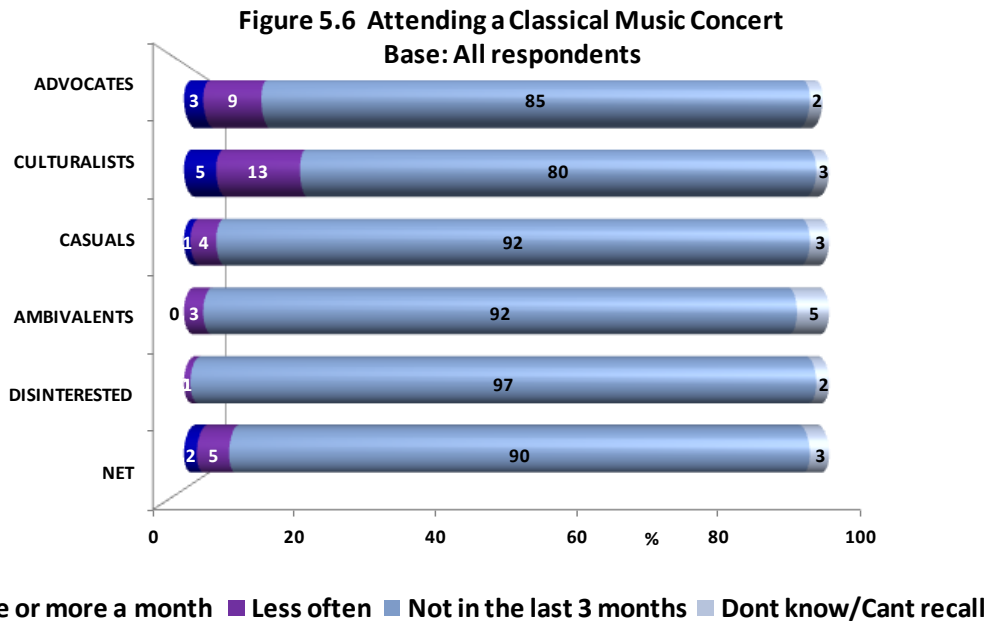
## 5.5 POPULAR MUSIC CONCERT

Note from figure 5.5 below that some 28% have been to at least one such concert over the last three months; 8% to one or more a month. The “Culturalists” showed the highest interest in this art form, with a net of 55% attending at least one such event in the last 3 months.



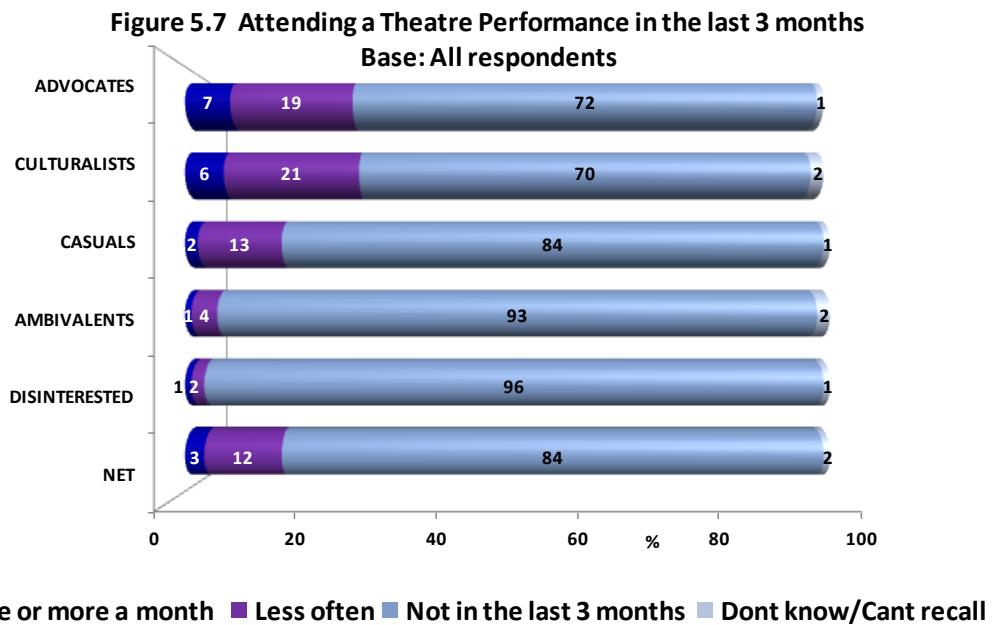
## 5.6 ATTEND A CLASSICAL MUSIC CONCERT

As may be seen from figure 5.6, only an average of 5% report attending a classical music concert at all. But the “Culturalists” show much greater interest, with 5% attending one or more a month and a net of 18% at least one in the last three months.



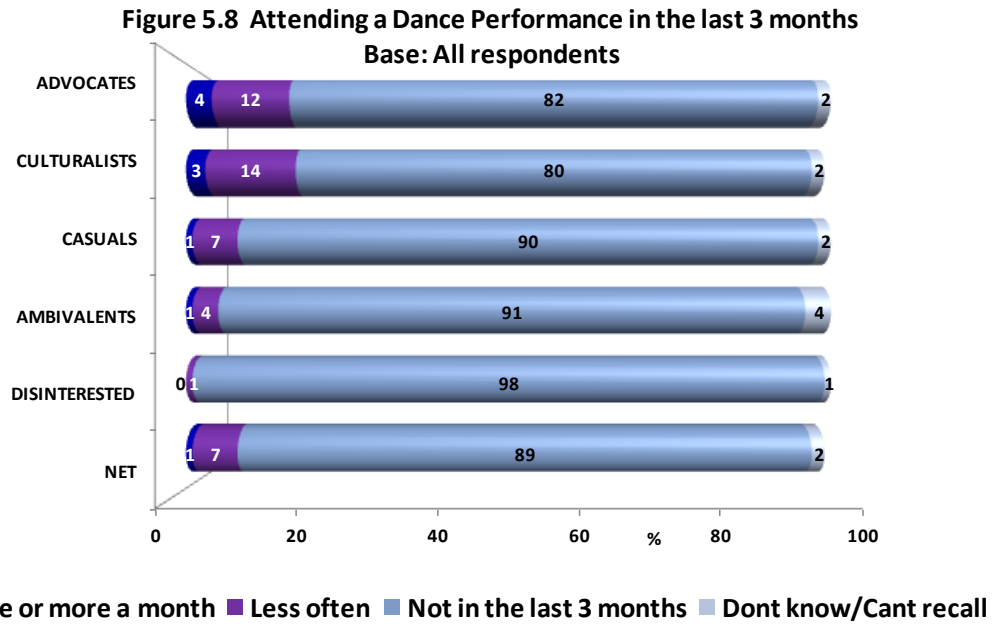
## 5.7 ATTEND A THEATRE PERFORMANCE IN THE LAST 3 MONTHS?

Figure 5.7 shows the “Advocates” and “Culturalists” each having heightened attendance at theatre performances, with respectively 26% and 27% at least once in the last three months.



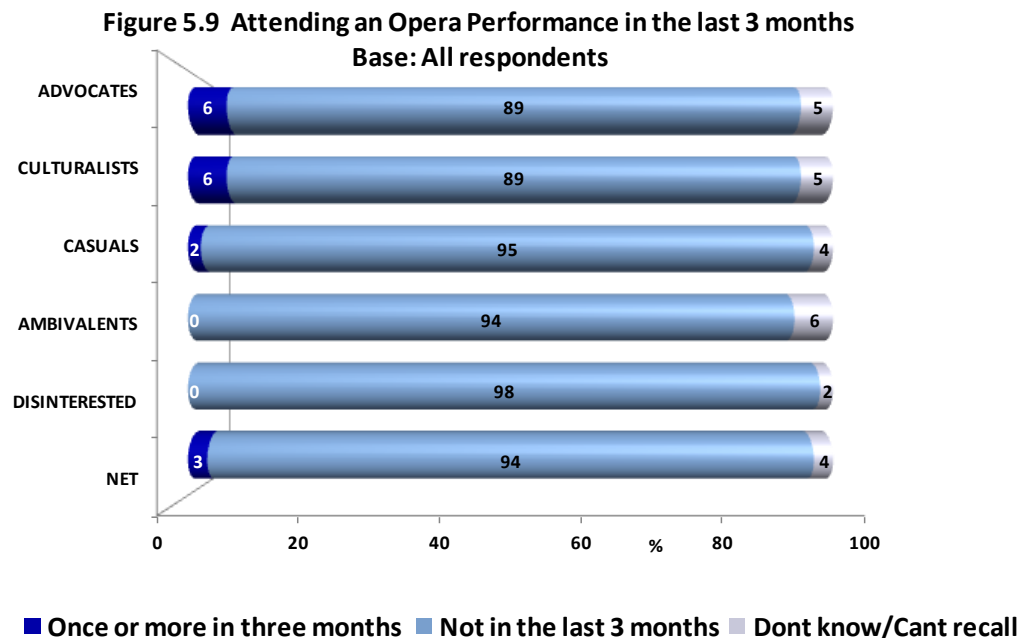
## 5.8 ATTEND A DANCE PERFORMANCE IN THE LAST 3 MONTHS?

As figure 5.8 shows, approximately 16% of “Advocates” and 17% of “Culturalists” have attended at least one dance performance over three months, compared to the average of just 8%.



## 5.9 ATTEND AN OPERA PERFORMANCE IN THE LAST 3 MONTHS?

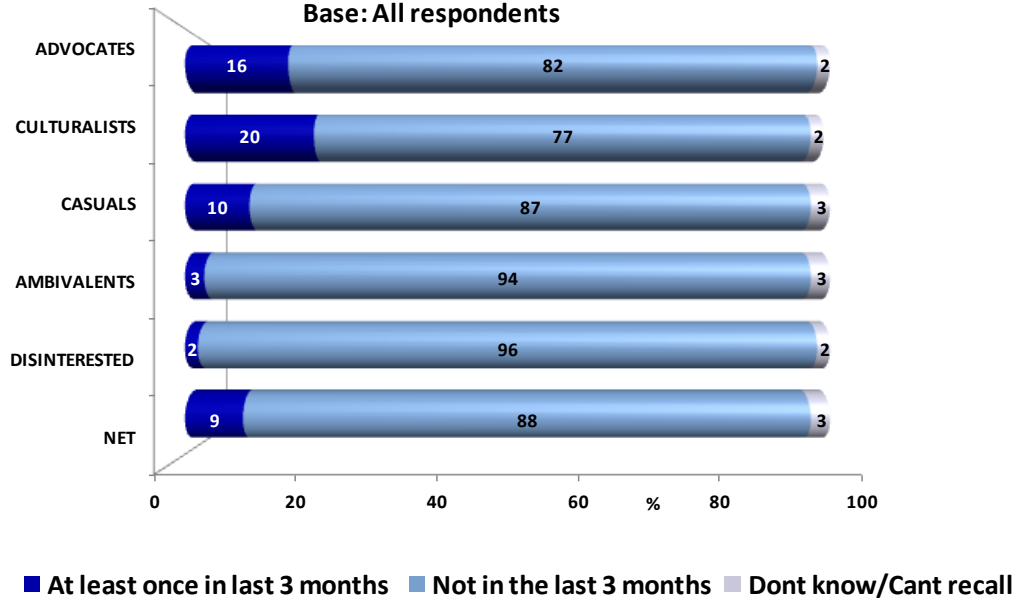
Figure 5.9 below shows that only 3% of respondents reported having been to the Opera at all in the last 3 months. This proportion is doubled amongst Advocates and Culturalists (6% each).



## 5.10 ATTEND MUSICAL/CABARET IN THE LAST 3 MONTHS?

Figure 5.10 shows 9% reporting that they had attended a musical or cabaret performance in the last three months. “Culturalists” were the most likely to have done so (20%).

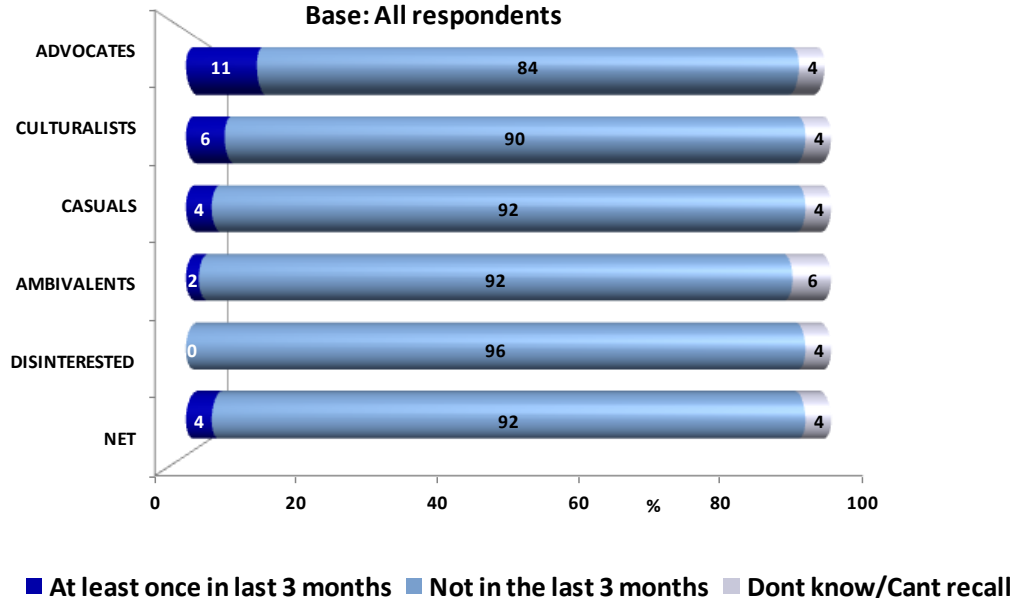
**Figure 5.10 Attending a Musical/Cabaret Performance in the last 3 months**  
Base: All respondents



## 5.11 ATTEND A LITERATURE OR POETRY EVENT IN THE LAST 3 MONTHS?

Figure 5.11 shows that overall just 4% of respondents have been to a poetry or literature reading in the last three months. “Advocates” are the most likely to have done so at 11%, followed by “Culturalists” on 6%.

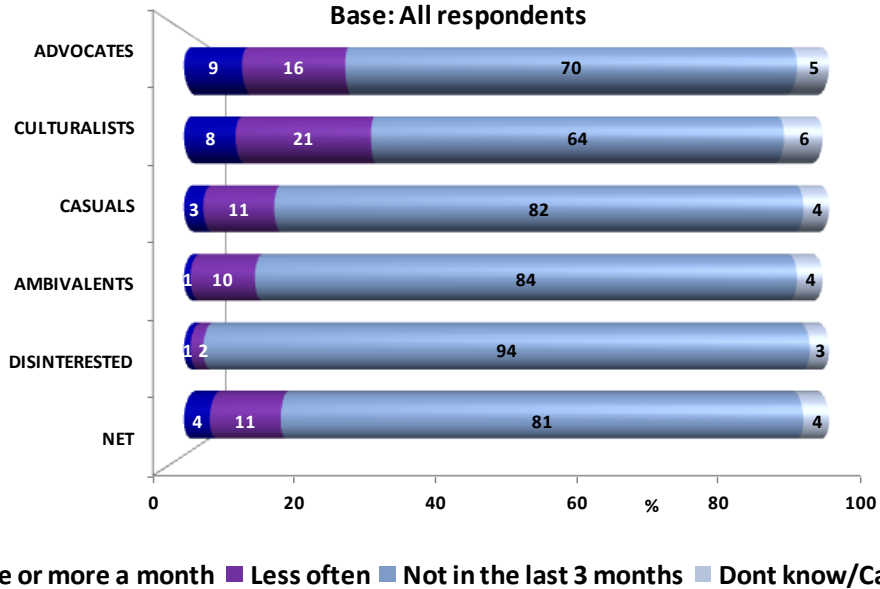
**Figure 5.11 Attending a Literature or Poetry Event in the last 3 months**  
Base: All respondents



## 5.12 ATTEND ANY OTHER ARTS OR CULTURE EVENT OR FESTIVAL IN LAST 3 MONTHS?

The results shown in figure 5.12 below indicate that 4% have been to one or more a month, and a further 11% less often, making a net of 15% attending at least one such event in the last three months. “Culturalists” are the most active in this category, followed by the “Advocates”.

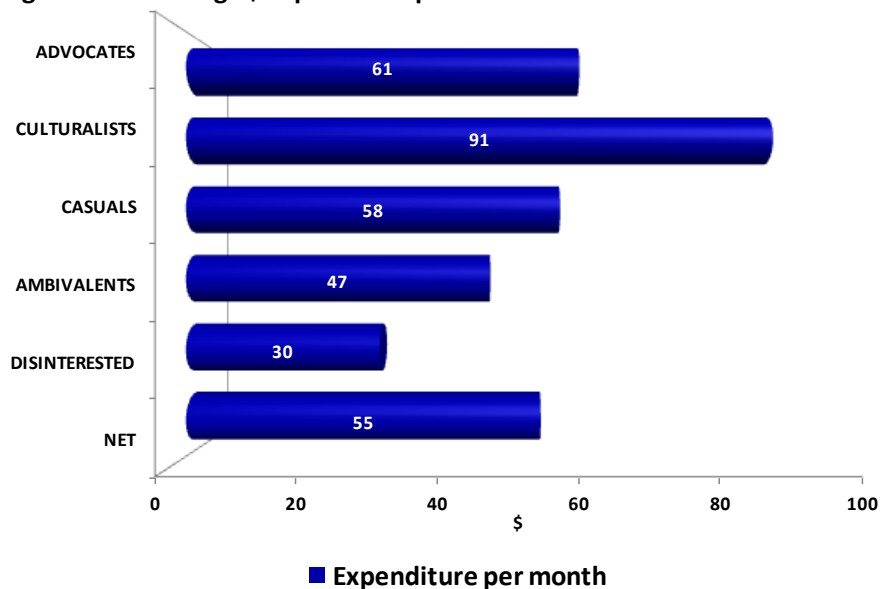
**Figure 5.12 Attending Any Other Arts or Culture Event or Festival in the last 3 months**  
Base: All respondents



## 5.13 EXPENDITURE PER MONTH?

Figure 5.13 below shows the range of the average expenditure per month. The average overall is \$55 per respondent. This ranges from a low of \$30 for the “Disinterested”: segment up to the high of \$91 per respondent amongst “Culturalists”.

**Figure 5.13 Average \$ Expenditure per month on Arts or Other Culture Event**



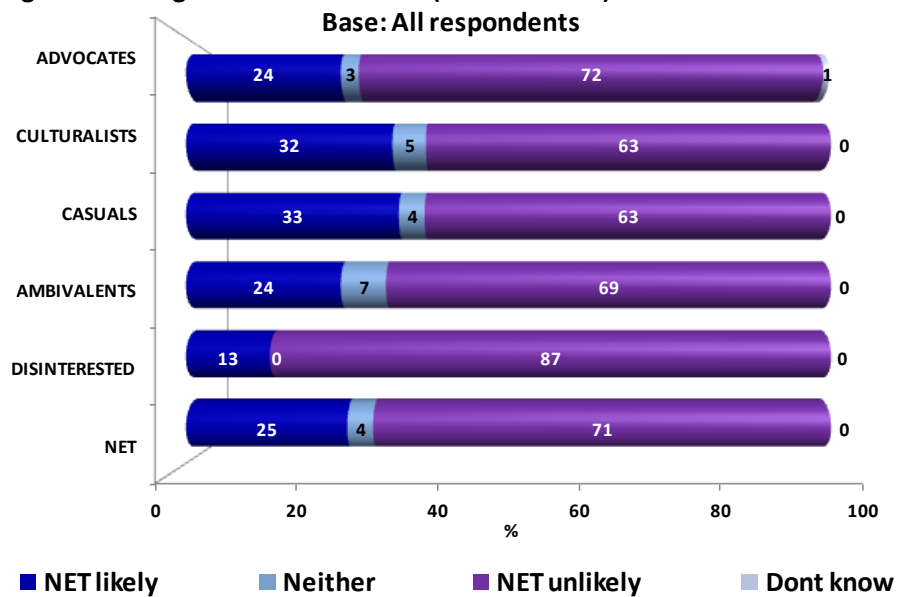
## 6.0 INFORMATION SEARCHES, COMMUNICATION AND BOOKINGS

Respondents were asked a series of questions about the way that they gather information and bookings for entertainment.

### 6.1 USAGE OF SOCIAL NETWORKS (FACEBOOK ETC.) TO FIND OUT ABOUT EVENTS

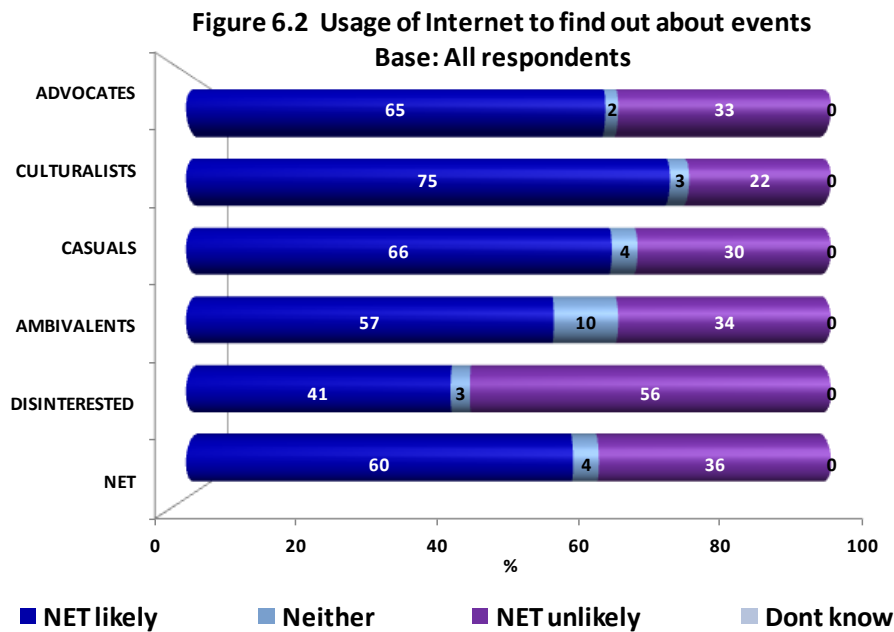
As figure 6.1 indicates, overall one in four respondents indicated that they are likely to use social networks to find out about events. Indeed, amongst the “Culturalists” we find almost a third (32%) reporting that they were likely to use this as an information source. It is also interesting that the “Casuals” are also relatively likely to use social networks (33%), indicating that this communication channel may be valuable in encouraging greater arts involvement amongst this “irregular user” group.

Figure 6.1 Usage of Social Networks (Facebook etc.) to find out about events



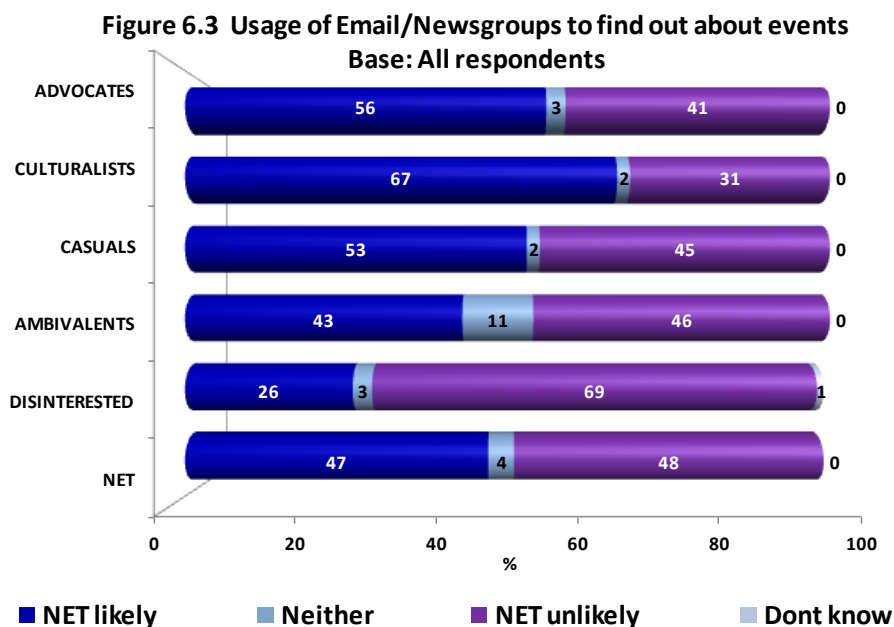
## 6.2 USAGE OF THE INTERNET TO FIND OUT ABOUT EVENTS?

As figure 6.2 shows, there is even greater usage of the internet for information about culture and arts events. Overall, some 60% indicate they are likely to do so; 75% amongst “Culturalists.”



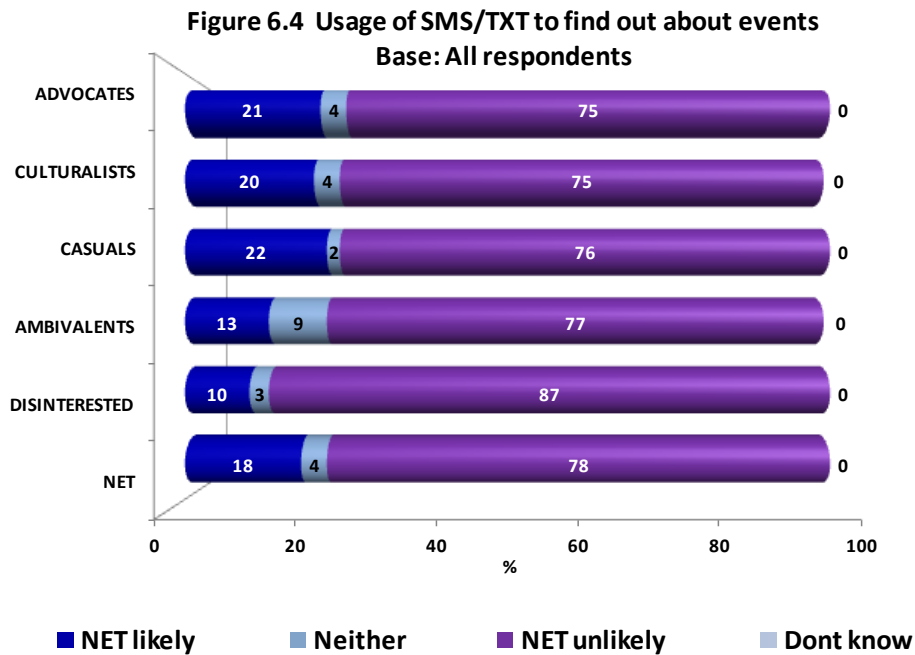
## 6.3 USAGE OF EMAIL/NEWSGROUPS FIND OUT ABOUT EVENTS?

Figure 6.3 shows that overall almost half (47%) indicated that they are likely to use email or news groups. This is heightened amongst “Culturalists” (67%) and “Advocates” (56%), possible as a reflection of their membership of “friends of” groups or similar arts appreciation member organisations.



## 6.4 USAGE OF SMS/TXT TO FIND OUT ABOUT EVENTS?

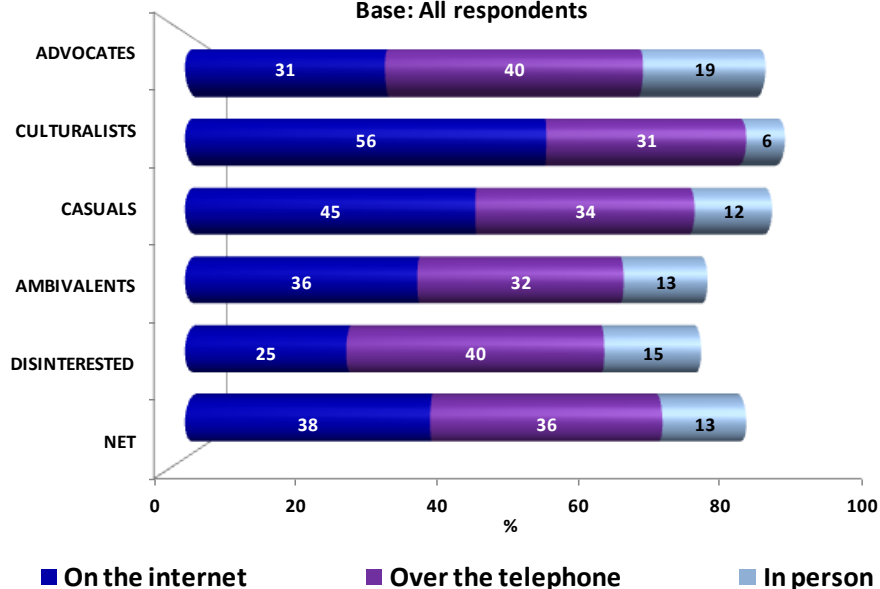
Figure 6.4 shows a much lower usage of these communications channels. Just 18% indicate that they would be likely to use them.



## 6.5 MAIN AVENUE TO BOOK OR MAKE RESERVATIONS FOR THE EVENTS OR ACTIVITIES?

Figure 6.5 shows the extent to which the internet has come to dominate booking procedures. It is the most common means (38% to the phone 36%), particularly for the heaviest users (“Culturalists”). Note the contrast in the booking patterns between “Culturalists” and “Advocates” (31%) usage of the internet. It is interesting that the “Casuals” also show a quite strong preference for the internet (45% over the phone (34%).

**Figure 6.5 Main Avenue Used to Book or Make Reservations for the Events or Activities**  
Base: All respondents





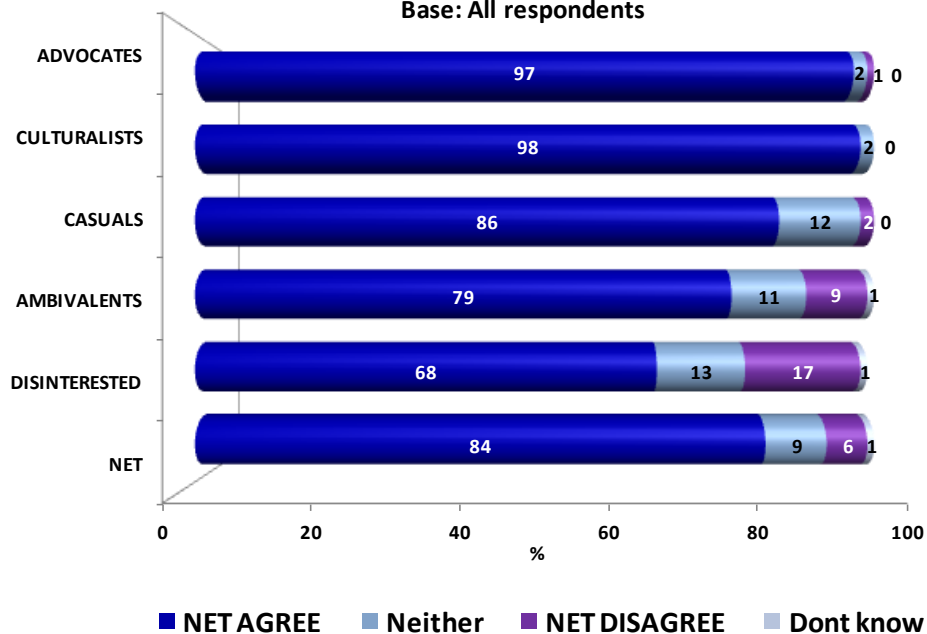
## 7.0 ATTITUDES TOWARDS THE ARTS

The attitudes towards culture and the arts were a major component of the segmentation exercise. The following shows the extent to which the segments differed in their opinions on the key measures used.

### 7.1 SHOULD THE WESTERN AUSTRALIAN GOVERNMENT INVEST IN ARTS AND CULTURAL ACTIVITIES TO ENSURE THEY ARE AVAILABLE TO THE PUBLIC?

As figure 7.1 below shows this is an area in which there is not a dramatic difference between segments; there is general agreement that the government should invest in arts and cultural activities. Even amongst the “Disinterested” group we find the great majority (68% of the opinion that the State Government should invest in culture and the arts.

Figure 7.1 Should the Western Australian Government Invest in Arts and Cultural Activities?  
Base: All respondents



## 7.2 "ARTS COMPANIES & PUBLIC ART GALLERIES ETC. SHOULD RELY ON THEIR TICKETS SALES ALONE."

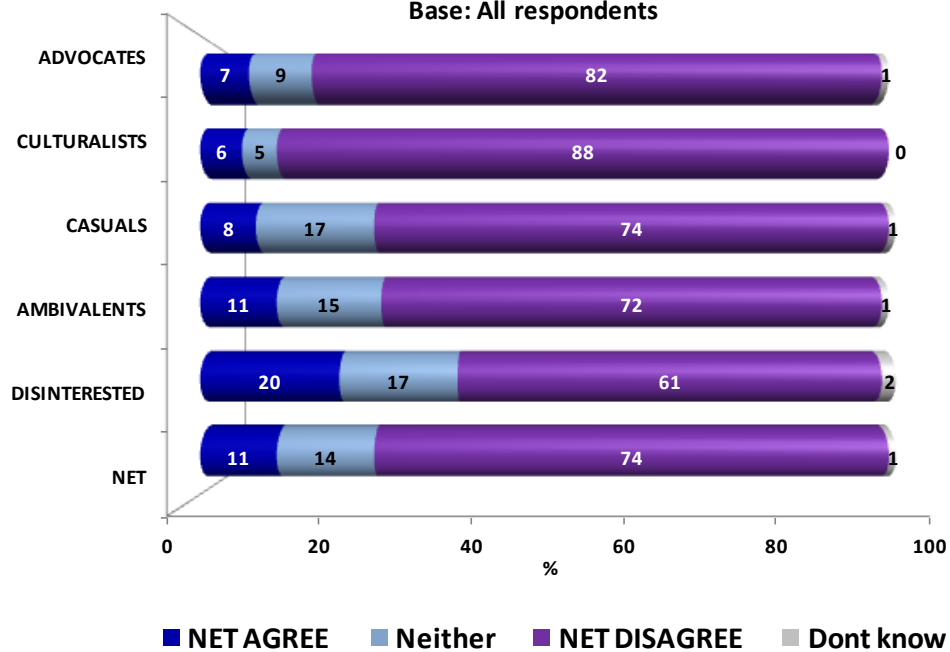
The actual question was the level of agreement or disagreement that:

"All theatres, ballet and opera companies and public art galleries etc. should rely on their tickets sales alone."

As figure 7.2 below shows there is general (74%) disagreement with this statement, though one in five (20%) of the "Disinterested" segment is in agreement.

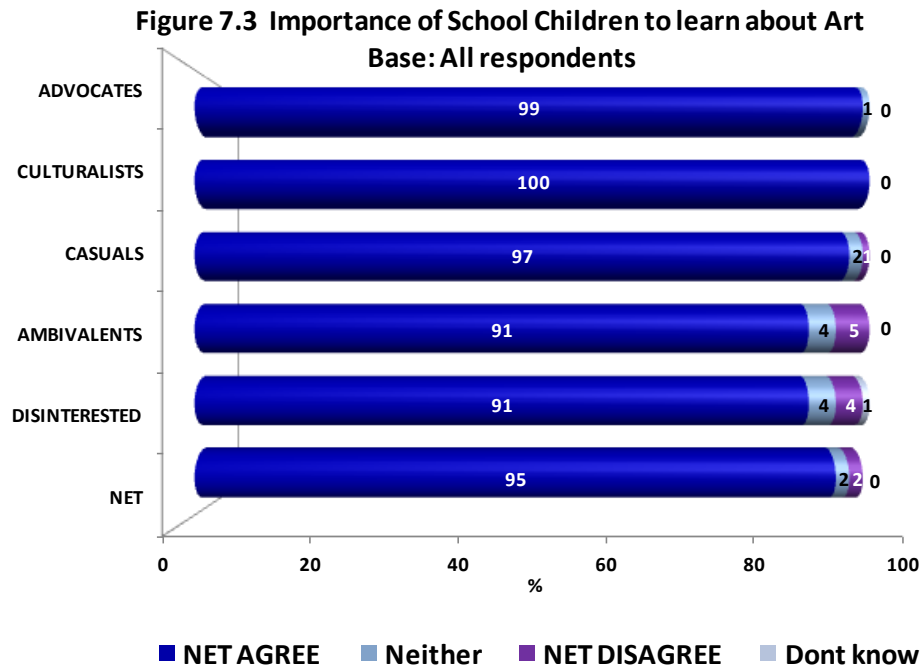
The picture that emerges is that there is very strong support for the arts amongst the two most active segments ("Advocates" and "Culturalists"), but also strong support amongst the "Casuals" in particular, and also the "Ambivalents".

Figure 7.2 Arts Companies & Public Art Galleries etc. should rely on their tickets sales alone  
Base: All respondents



### 7.3 IS IT IMPORTANT FOR SCHOOL CHILDREN TO LEARN (ABOUT THE ARTS)?

As figure 7.3 below shows, there is almost universal agreement with this proposition.

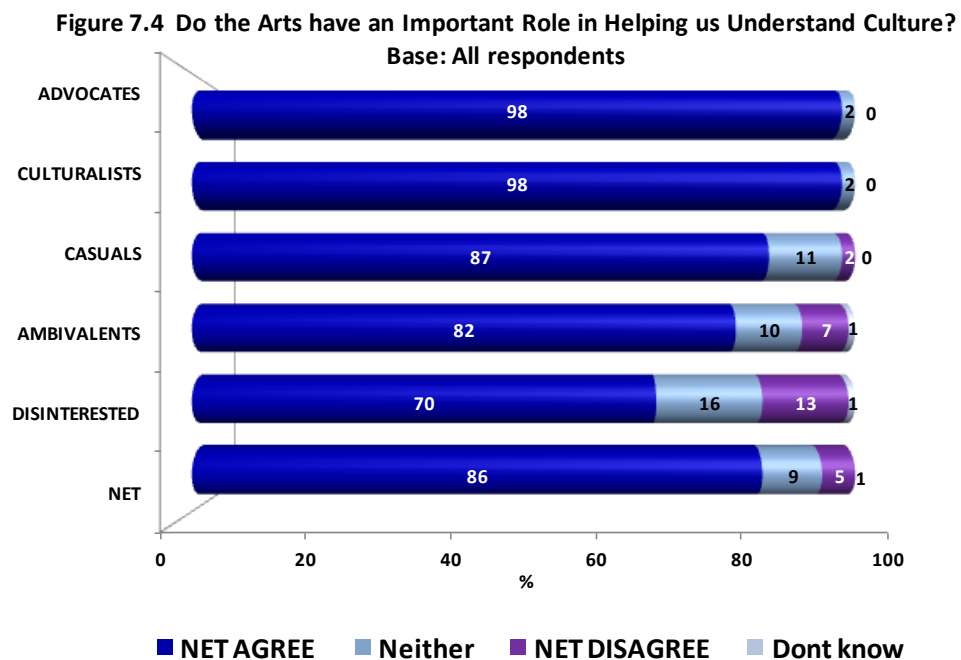


## 7.4 DO THE ARTS HAVE AN IMPORTANT ROLE IN HELPING US UNDERSTAND CULTURE?

The actual question was to agree or disagree that:

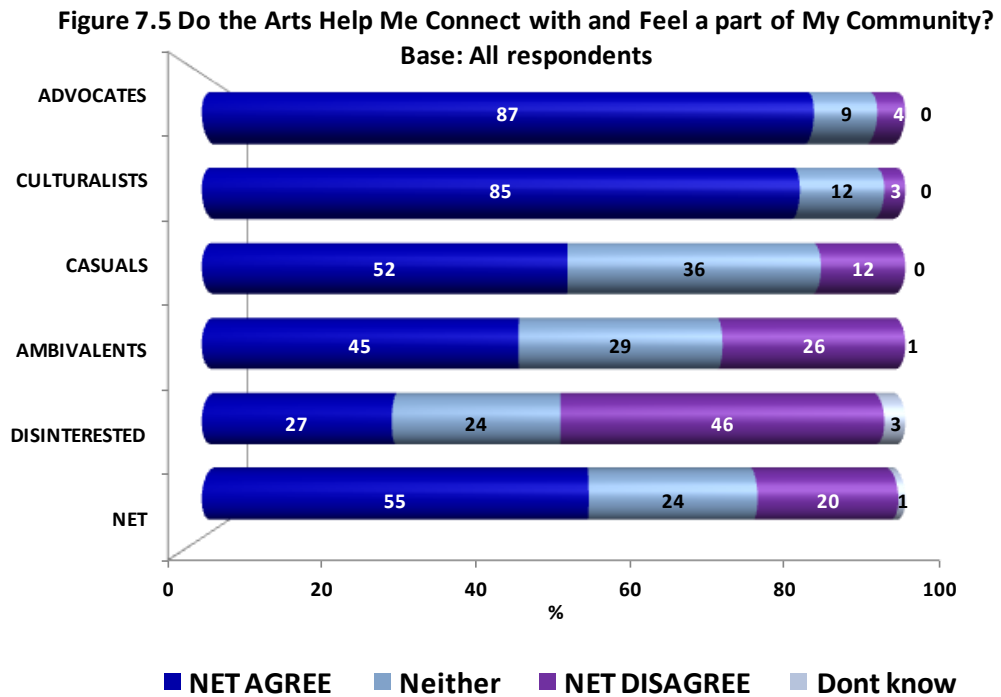
The arts have an important role in helping us understand our own culture and way of life, and those of others."

As figure 7.4 below shows, there is strong agreement with this proposition, though there are some differences in the strength of this belief across the segments – reflecting very similar responses to those in section 7.1, relating to Government investment in culture and the arts.



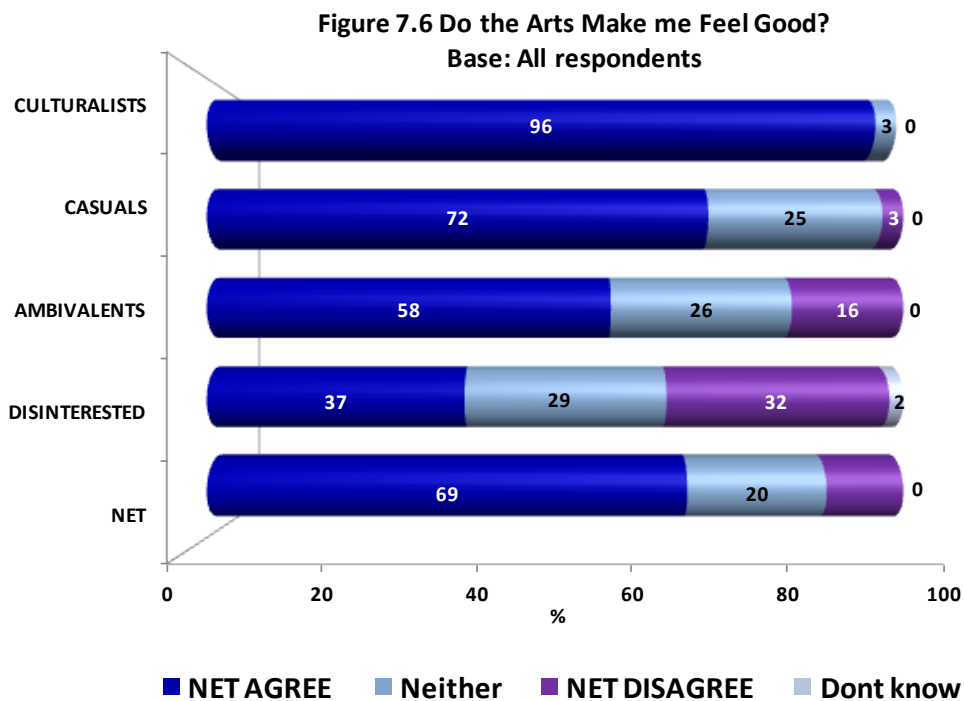
## 7.5 DO THE ARTS HELP ME CONNECT WITH AND FEEL A PART OF MY COMMUNITY?

As figure 7.5 below shows, there is quite a variation in response to this question. Note that the “Disinterested” segment in particular has a small proportion (27%) in agreement with this statement compared the sample average of 55%. Only the “Advocates” and “Culturalists” show really strong agreement with this proposition (87% and 85% respectively).



## 7.6 DO THE ARTS "MAKE ME FEEL GOOD"?

As figure 7.6 below shows, there is a very significant variation in response to this question. Again it may be seen that the "Disinterested" segment in particular has a small proportion (37%) in agreement with this statement compared the sample average of 69%. Again the "Advocates" and "Culturalists" show really strong agreement with this proposition (97% and 96% respectively), but so too do the "Casuals", suggesting that the "Casuals" may be enticed to take part in more arts activities and events with appropriate encouragement. They form a logical target for expansion of marketing effort of the Arts portfolio.



## ***APPENDIX A - QUESTIONNAIRE***

## ***APPENDIX B – DATA ANALYSIS TABLES***