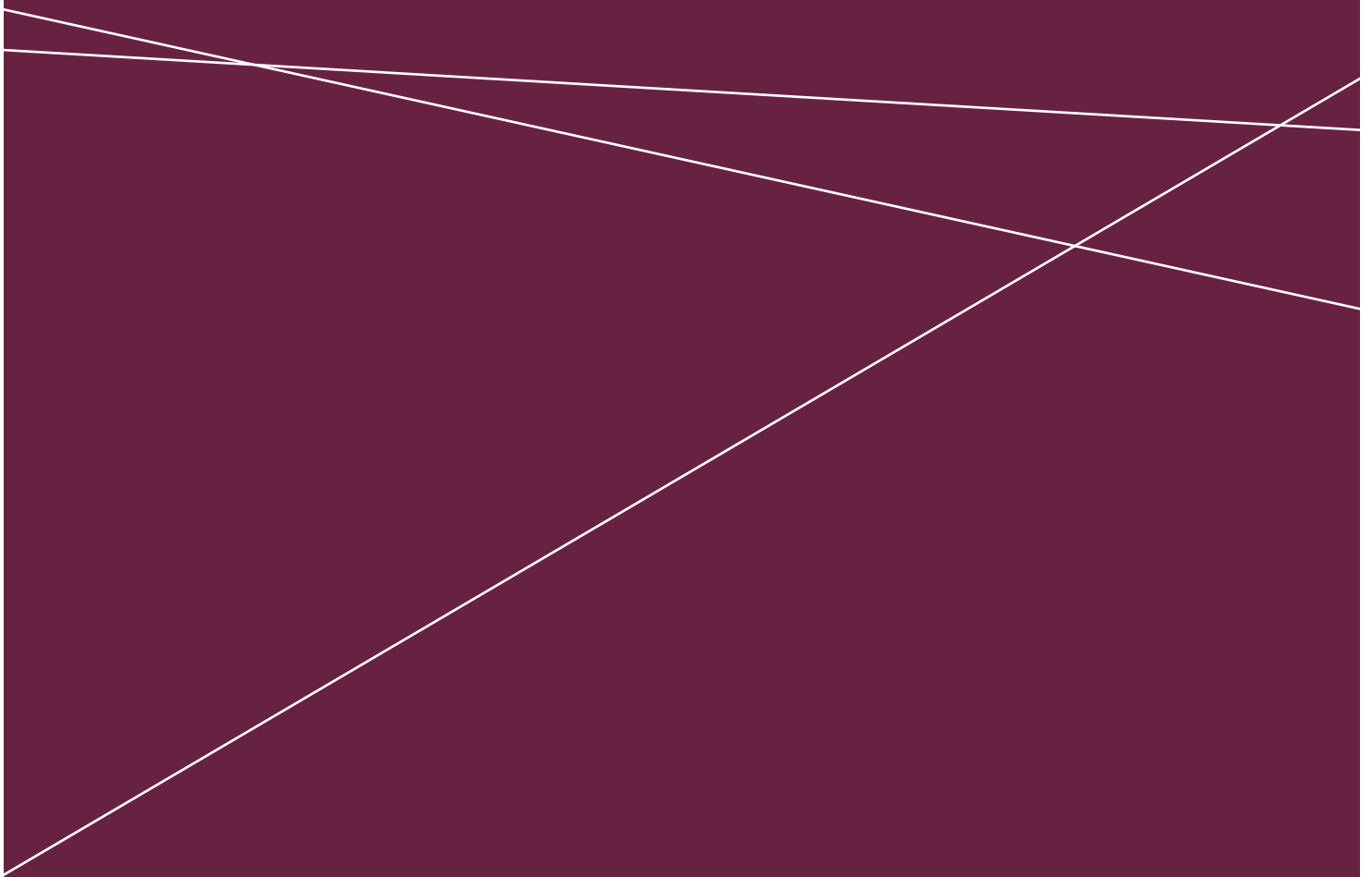
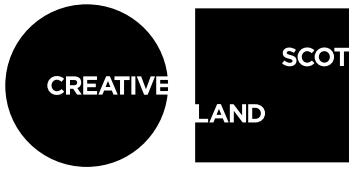


Creative Scotland

COVID-19 Population Survey





ALBA | CHRUTHACHAIL

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Background

Following the introduction of COVID-19 restrictions in March 2020, the impact on Scotland's creative sectors has been severe. Creative Scotland has commissioned 56 Degree Insight to undertake research looking at the attitudes of the general population in relation to cultural participation and attendance. This work involves a programme of survey research to monitor and measure audience interest in returning to cultural activities and changing patterns of consumption.

The first wave of research, completed in August 2020, invited 1033 participants to complete an online survey, a representative sample of the Scottish population. The findings of the first wave are available on the Creative Scotland **website**.

This report sets out the findings of the second wave of the research, with fieldwork undertaken between the 6th and 23rd November 2020. This wave updates our understanding of public opinion on returning to cultural activity and enables comparison to understand how attitudes may have changed since the summer.

1101 online surveys were conducted in the second wave, with geographic and demographic quota controls used to ensure that the sample was representative of the population. An additional boost of 100 interviews was conducted with members of the BAME population to allow for comparative analysis of results for this group. Respondents were asked about 4 main topics:

When will audiences return to cultural activity?



What are the main barriers, or enabling factors, to this return happening?



What are the main changes in public patterns of spending and consumption of arts activity as a result of lockdown?



What differences exist – between art forms, types of activity or locations?



This summary report provides the key findings from this second wave of research. To access the full report, go to:

www.creativescotland.com/COVID19-audience-research

Introduction

This survey research, commissioned by Creative Scotland and undertaken by 56 Degree Insight in November 2020, aims to better understand the Scottish population's attitudes to attending cultural events and venues. It was undertaken as the first reports of successful clinical trials for COVID vaccines became public but while Scotland remained in tiered restrictions affecting public life.

The findings show that the desire to attend cultural events and venues remains strong. The creative sectors may, however, recover more slowly than other parts of the economy and public demand will vary between organisations, art forms and the venues in which work is presented:

- Scotland's population increasingly say they really miss attending cultural venues and events since COVID restrictions
- The vast majority of people are engaging with cultural activity at home, although fewer are accessing content which might substitute for attendance at a venue or event
- Online performances are mostly watched at no cost. Only around 1 in 6 (17%) of the population agreed that they would pay to access this activity online in the future
- Interest in attending cultural activities once restrictions are eased remains lower than for many other leisure pursuits
- Desire to attend arts and cultural venues remain polarised; while some are keen to attend when they can, others are wary. Most people feel that they will take their time or are reluctant to return to arts venues
- The main concerns of the public are the desire to avoid crowds and being able to maintain social distance
- Audiences are nevertheless looking forward to attending cultural activity when they can, and are open to trying new experiences at different types of venue
- Nearly half of the population would accept a reduction to 1 metre social distancing restrictions in venues, but additional protections would be vital
- When a vaccine is generally available attendance levels look likely to return to previous levels or increase amongst some population groups
- However, concerns about the health and financial implications of COVID are highest for those who see arts and culture as important to their lives.

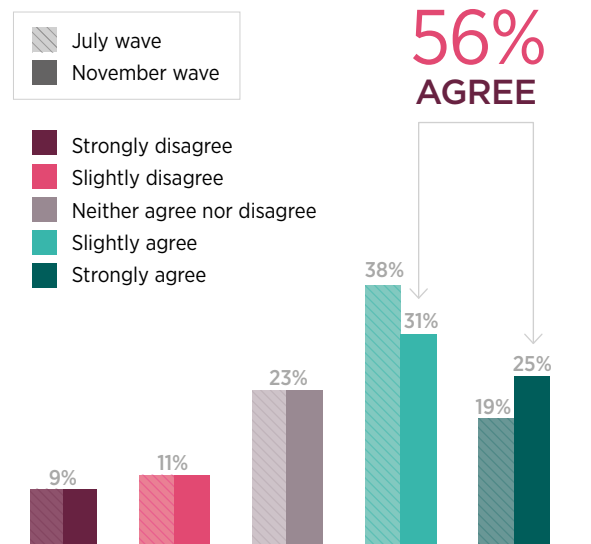
Culture in Lockdown

Over half the population report that they are really missing attending cultural activity. Reflecting on the period since initial COVID restrictions began in late March, 56% of the population agree that they have 'really missed the opportunity to go to cultural events and venues' and only one in five disagreed. Moreover, since the July wave of this research the percentage stating that they 'strongly agree' had increased from 19% to 25%. (**Figure 1**). People who had attended most often before restrictions were the most likely to miss the opportunity to do so, as were those living in the least deprived areas of Scotland.

56%

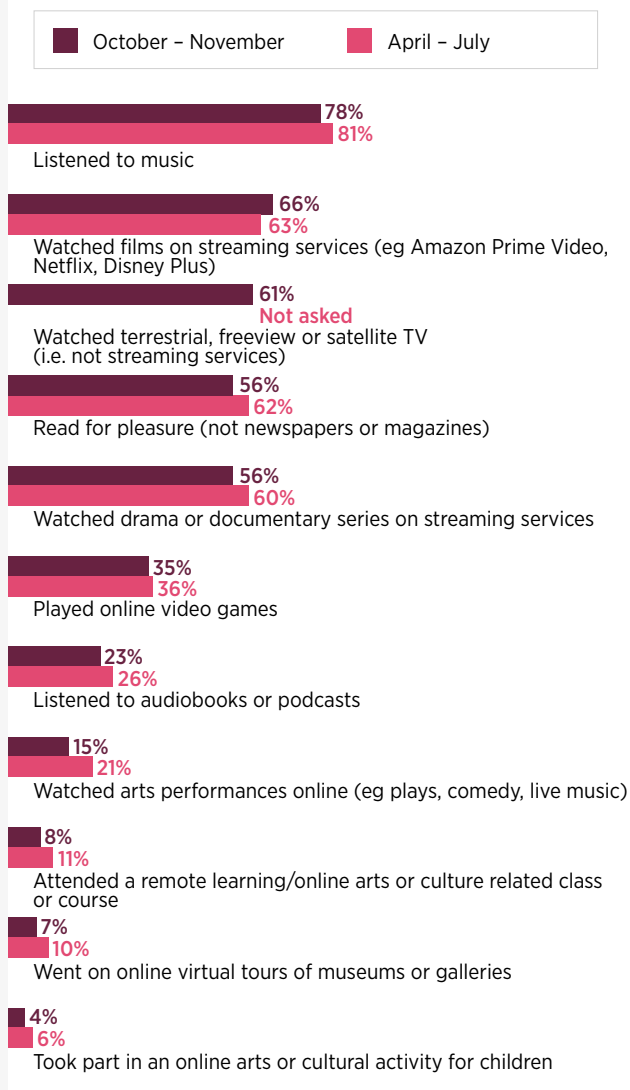
Agree they have missed cultural events

Figure 1: 'Since lockdown, I've really missed the opportunity to go to cultural events and venues'



Levels of participation in cultural activities undertaken at home have remained high. The vast majority of the population (98%) engaged in at-home cultural activity in the four weeks prior to being surveyed. As in the July wave of the research, the most popular activities were listening to music (78%), and streaming films (66%) and a majority of people reported that they watched television and read for pleasure. Where data is available, we see increased levels of participation in all of these activities since COVID restrictions were introduced (**Figure 2**).

Figure 2: Which of the following cultural activities, if any, have you done at home?



ONLY
17%
WILLING TO PAY

Despite increased participation in online cultural activities, there is a limited appetite to pay for this

In the July wave of the survey, a third of the population (33%) had participated in 'substitute' cultural activities that could be compared more directly with attending cultural events and venues: viewing performing arts online; attending virtual tours of museums or galleries; attending remote learning classes; or taking part in online arts or cultural activity for children. In November, a smaller percentage reported participating in these activities, reducing to a fifth of the population (20%).

Cultural engagement at home was highest amongst those who most regularly attend cultural events and venues and showed a strong relationship to preferences prior to COVID restrictions (i.e. high numbers of concert-goers listened to music at home and high numbers of cinema attendees streamed films). Younger people (aged 16-34) reported the highest usage of streaming services, online gaming, listening to audiobooks and podcasts, watching online performances and attending online learning sessions. Members of the BAME population were more likely to play online video games (57%) and listen to audio books or podcasts (40%).

People watched a range of online performances in a variety of formats. Around half of those who had watched performances online (49%) had watched performances recorded prior to the COVID pandemic, while a slightly smaller number (46%) watched live performances streamed from a cultural venue. A third of those who had watched an online performance had either paid or made a voluntary donation (32%).

The Scottish public have also increased the frequency of their participation in at-home cultural activities since COVID restrictions. In all categories, respondents reported participating more often than in an equivalent period in 2019, and over a third listening to music, reading and watching television or streaming services more often. These figures, are however, not as high as those reported in July 2020.

The survey asked people if their enjoyment of lockdown cultural activities meant that they hoped to do them more often in the future. Their responses were mixed: Less than a third (29%) agreed that they would, 45% neither agreed or disagreed and 26% disagreed. Respondents reported a limited appetite for paying for new activities they had accessed online during lockdown, with only one in six (17%) willing to pay for these in the future. Levels of ongoing interest and willingness to pay were higher for younger age groups, people with children in their household and members of the BAME population.

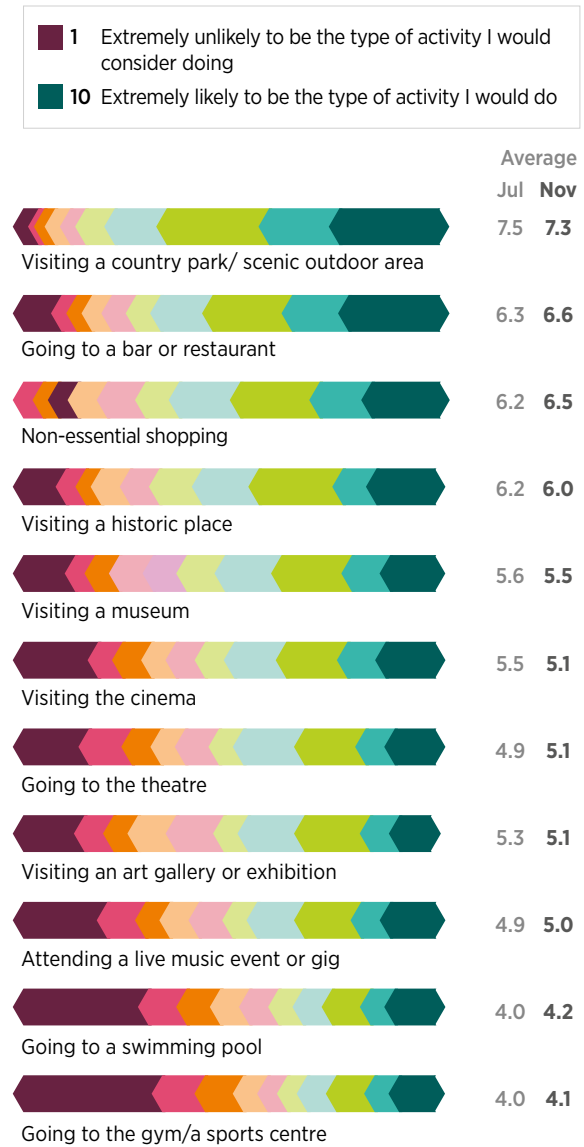
Post-lockdown leisure

Survey respondents were asked to rate their desire to take part in a range of leisure activities.¹ Interest in attending cultural activities remains lower than for many other types of leisure pursuits, with ratings ranging from an average of 5.5 out of 10 for going to the cinema to 5.0 for attending a live music event or gig. The desire to visit country parks and other outdoor areas remains high (an average of 7.3 out of 10), levels for indoor activities were much more varied, with swimming pools, gyms and sports centres the least popular. (**Figure 3**).

The survey also asked people when they intend to take part in cultural and leisure activities again. While a large proportion of the Scottish population had already been to outdoor places, shopping centres and bars and restaurants, respondents were more reluctant to attend cultural events and venues when this was possible for them. The majority of the population were still “in no hurry” or not planning to visit cinemas, art galleries, live music events or theatres². The November wave of the research, however, suggests that public openness to attend the theatre and live music events when possible has increased marginally (**Figure 4**).

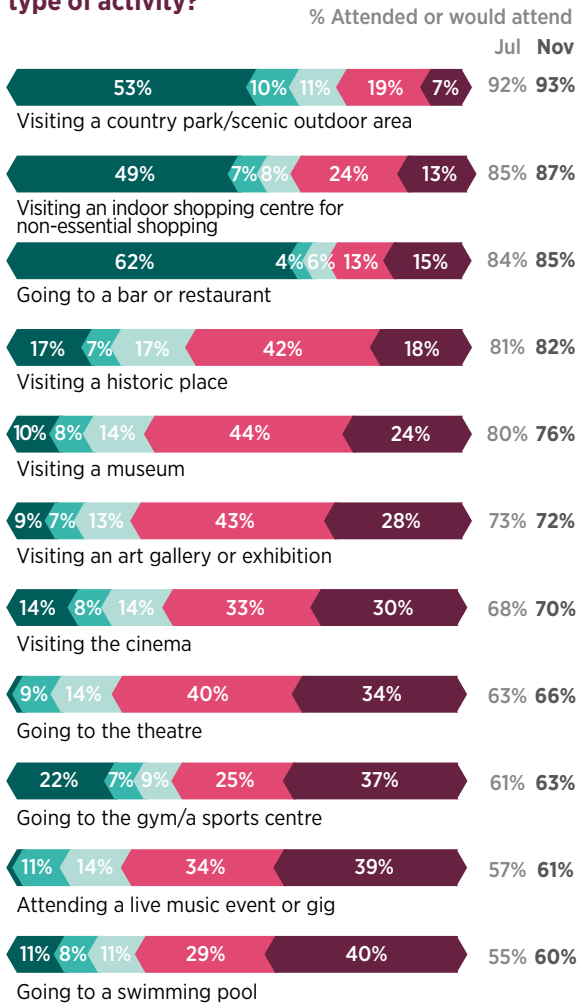
Interest in attending cultural events remains lower than for many other types of leisure pursuits

Figure 3: Thinking about how you feel at the moment, how likely would you be to do this type of activity?



- 1 Where the activities are already possible, respondents were asked to base their answer on how they feel about doing them now. Where venues are still closed, respondents were asked to base their answer on when they re-open.
- 2 Responses shown exclude those who stated a venue or type of activity was not relevant to them. These findings are difficult to interpret due to changes in levels of restrictions across Scotland under the tiered system introduced in Autumn 2020.

Figure 4: Which, if any, of the following best describes when you would feel happy to do this type of activity?

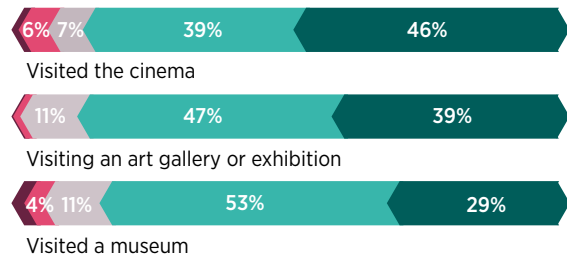


- Have already been
- Plan to attend as soon as possible
- Would visit - but would wait a few weeks
- Would visit - but would be in no hurry to do so
- Would not visit in the foreseeable future

A fifth of the population had taken part in an 'out of home' cultural activity since lockdown rules eased in the summer. Overall 20% had undertaken 1 or more of the available cultural activities with 12% visiting the cinema, 9% going to a museum and 7% going to an art gallery. These early returners were likely to be younger and more likely than the population average to agree that arts and culture were an important part of their life.

High numbers of those who had attended the cinema, an art gallery or exhibition or a museum rated their experiences as 'quite' or 'very' good, with 85% of cinema-goers positive about their visit (Figure 5). Respondents noted particularly enjoying the experience after not attending for so long, being pleased with adherence to safety rules and the event being well organised. Those with less positive experiences noted others were not following social distancing rules, flagged concerns with overcrowding or said that the need to follow COVID rules had reduced the quality of their experience.

Figure 5: How would you rate the quality of your experience?



- Very poor
- Quite poor
- Neither good nor bad
- Quite good
- Very good

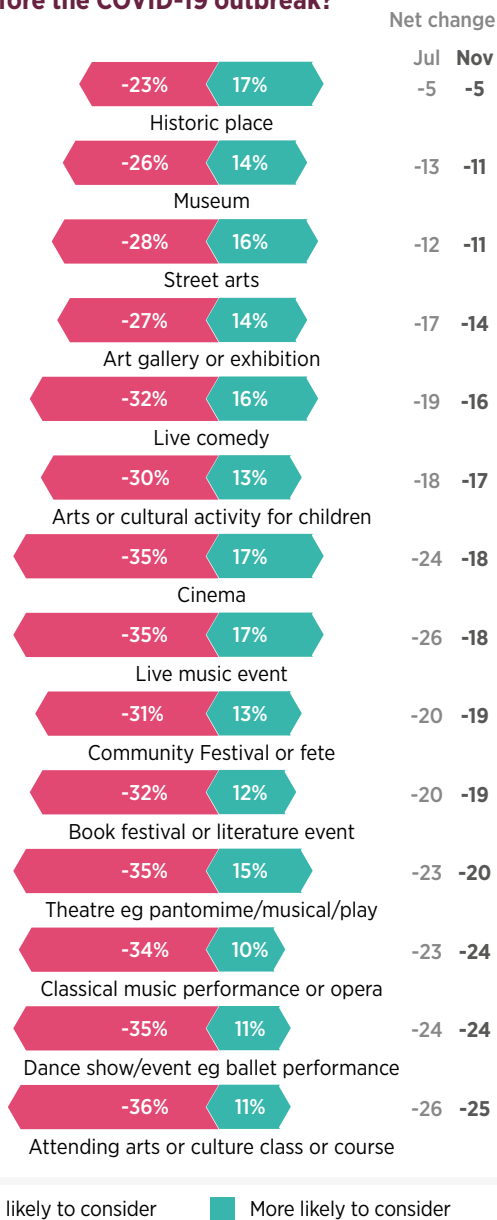
80%+

Over 80% of those attending a cinema, gallery or museum during lockdown were positive about the experience

Attitudes to cultural attendance

Respondents were asked how their appetite for different cultural activities had changed since the COVID-19 outbreak, with a range of options possible ('more likely to consider', 'no difference', 'less likely to consider' and 'would not have considered before and still would not'). Demand for all stated cultural activity is suppressed, from a net reduction of 5% for visiting an historic place to a net reduction of 25% for attending an arts or culture related class or course (**Figure 6**).

Figure 6: How have your preferences changed compared with what you might have chosen to do before the COVID-19 outbreak?



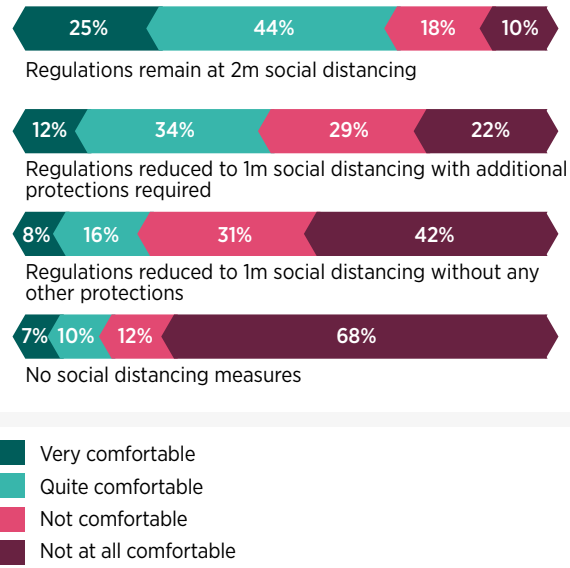
Comparing the results for July and November waves of the research suggests that demand for some activities is rising, in particular for cinema and live music. These results are strongly correlated to age, with younger people more positive about attending in future.

Demand for all types of art and cultural events remains suppressed

Respondents were asked how comfortable they would feel attending performances at a range of venue types. While over half (53%) felt very or fairly comfortable attending outdoor events, fewer were comfortable attending community venues (38%), medium to large indoor venues (35%), arena sized venues (34%) or smaller indoor venues (28%). These findings are consistent with the early survey wave in July, showing that assurances on safety are still needed for the public to feel comfortable attending indoor arts venues in future. Those more likely to feel comfortable attending indoor venues included younger age groups, families, residents of urban areas and those stating they were less worried about the health impacts of the virus.

Respondents were asked how comfortable they would feel attending indoor cultural venues in the near future with a range of social distancing options (**Figure 7**). Two-thirds (69%) of the population were very or fairly comfortable with regulations remaining at the current 2 metre distancing requirement. A more mixed response was provided in response to the option of 1 metre distancing but with additional protection such as face coverings, perspex screens, recording contact details and time limitations in place. Only small numbers reported being comfortable with a scenario where no social distancing measures were in place.

Figure 7: If you were to go to indoor cultural activities, how comfortable would you feel about the following?



Comfort with the 1-metre distancing scenario was higher for those under 35 (60%) and those with children at home (54%). Lower percentages of those aged 55 and over (34%) and people who reported being very worried about the health impacts of the virus (39%) felt comfortable with this option.

46%

Nearly half the population would accept a reduction to 1m social distancing in venues, but additional protections would be vital

Respondents were asked to comment on the key concerns they would have when deciding on whether to attend arts and cultural activities. The most frequently cited factors related to confidence that venues were enforcing the required restrictions and that controls were in place on the numbers of people attending. Other considerations included cost, distance to travel and the infection rate in the local area. One in 10 respondents indicated that they would wait until the COVID-19 vaccine had been 'rolled out' before they seriously considered attending arts and cultural activities again.

In general, interest in engaging with cultural events online if unable to attend in-person is low and few people perceived online events to be as good as live ones. Only 10% of the population would definitely be interested in engaging with online cultural events if they were unable to go to a venue, although a third (33%) stated that they would possibly be interested. Levels of interest were higher amongst women, younger age groups, the BAME population and people with children in their household. Those who were not interested commented on issues such as the lack of atmosphere, not being able to enjoy the audience interaction and feeling that the experience would be no different from watching television. Higher numbers – 16% of the population – would definitely be interested in attending outdoor cultural events if indoor venues were not possible, and a further 43% would possibly be interested. Levels of interest in attending outdoor events were higher amongst women, younger age groups and people with children in their household. Common responses amongst those who stated that outdoor events appealed to them included that they felt safer outdoors, there would be space to spread out and that they would enjoy being in the fresh air.

Returning to cultural activity

Respondents were asked to specify the arts activities they are most looking forward to attending again in the future. Nearly half the population (48%) identified looking forward to going to the cinema, followed by live music events (37%), the theatre (34%) and art galleries and exhibitions (23%). For those who regularly attended cultural activity prior to COVID restrictions, levels of interest in returning had increased between July and November.

70%

are interested in new ways of engaging with arts and culture

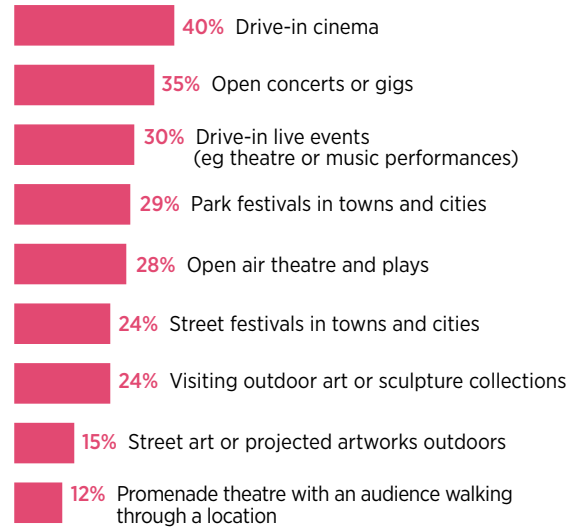
People continue to be interested in different ways of engaging with arts and culture. Overall, 70% of the Scottish population stated that they would be interested in attending one or more of the options for outdoor events shown in **Figure 8**. In particular, 40% of the Scottish population are interested in attending drive in cinema and a third are interested in open air concerts or gigs. Lower numbers expressed an interest in online or community-focussed options.

Views on providing financial support to the arts were more mixed. Around a third of the population are open to joining membership schemes or supporting crowdfunding campaigns to support arts organisations while COVID-19 restrictions are in place. 35% of people would be happy to pay more for tickets or to make a donation if this allowed cultural organisations to stay open, and slightly more said they would be happy to be given the option to donate to a 'recovery fund' when buying tickets.

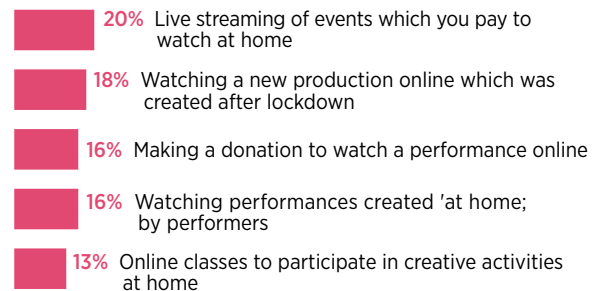
In the event of the virus being eradicated or a vaccine being found, half of the population (52%) would expect to attend the arts at the same levels as before COVID 19 and 23% said they would attend more often (**Figure 9**). Younger age groups were more likely to expect to increase their overall participation (33% would do more) as were members of the BAME population (35%) and those with children at home (34%).

Figure 8: Which of the following would you be most interested in attending if offered in your local area?

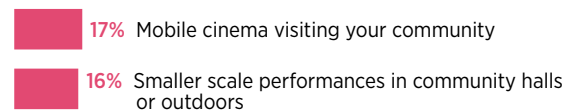
Outdoor events – 70% overall



Online events – 42% overall



Other events – 26% overall



However, people in Scotland continue to be worried about the impacts of COVID, with concerns highest for those who see art and culture as an important part of their life. While two thirds of the population (68%) agreed that they were very worried about the potential health impacts of COVID, this proportion increased to 76% for those stating that arts and culture were important in their life.

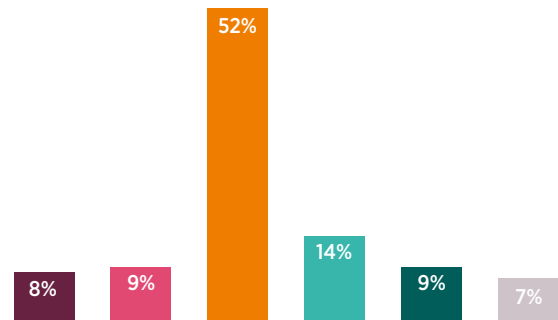
Half (51%) stated that they were more worried about personal finances than a year ago and 44% stated that their finances were already being impacted. Again these percentages were higher amongst those who stated that arts were important in their life (61%).

51%

Concerns about the health and financial implications of COVID are highest for those who see arts and culture as important to their lives

Figure 9: Were we to return to the same conditions as before lockdown, how often would you expect to attend arts and cultural events?

- A lot less than before lockdown
- A little less than before lockdown
- About the same amount as before lockdown
- A little more than before lockdown
- A lot more than before lockdown
- Don't know





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