

Covid 19: Public intentions on returning as audience members

Wave 2 report
(6th– 23rd November)

Creative Scotland
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Background	5
Cultural engagement during the pandemic	9
Desires and plans as restrictions are eased	22
Understanding changing attitudes to attendance	28



While most of the population continues to participate in more cultural activities at home, over half really miss attending events and venues

Over half of the population continue to really miss going to cultural events and venues (57%) with the strength of this feeling increasing for some as restrictions continue.

However, engagement with cultural activities at home continues to be important. As seen in July, during October and November over a third of the population reported spending more time reading, watching films, drama and documentaries on streaming services and broadcast television and listening to music than a year ago.

Participation in online substitutes for events in venues is declining and interest in taking part in these types of online activities in future is low

Whilst the vast majority of the population are spending time listening to music, watching television and/or reading, a somewhat smaller percentage (20%) continue to take part in online activities which could be considered as substitutes to attending venues (e.g. watching performances online, going on virtual tours of galleries). The percentage of people participating in these types of activity has decreased from 33% since the initial lockdown period.

Only around a third of those who have watched an online performance had paid or made a voluntary donation in return for watching, just 1 in 10 state that they would definitely like to join cultural events online in future and less than 1 in 20 would be willing to pay for this type of activity.

Reasons given for this type of event not appealing include the lack of atmosphere, no real audience interaction and a feeling that events would be no better than watching existing content on television.

Despite the easing of lockdown in summer allowing some re-opening of venues few Scots took the opportunity to attend and experiences were mixed

20% of the population have attended a cinema, museum, gallery or attended a performance in Scotland since lockdown rules eased in the summer.

The profile of those who attended was generally younger and largely people who felt that arts and culture were an important part of their life.

However over half of these participants rated the quality of experience as just 'quite good' or for a small percentage 'poor' with issues mentioned included concerns over other attendees (e.g. crowding, not following rules) and the required safeguards such as face coverings limiting levels of enjoyment.

Much of the population remains cautious about returning to cultural events and venues with an increasing percentage stating that they will wait until vaccination is rolled out

Levels of desire to take part in cultural activities and plans on when visits will take place remain very similar to those recorded in the July survey with many people feeling cautious and in no hurry to attend. The greatest decreases in 'demand' to attend have been measured for attending arts or culture related classes, dance shows, classical music performances and theatre.

Comparing demographics those who are most worried about the health impact of the virus are most cautious about returning to venues and events. This includes older age groups who are generally most concerned.

In contrast, interest in attending has declined less amongst the youngest age groups who are generally less concerned about health impacts. However, it should be noted that this age group also reports more significant negative impacts of the crisis on personal finances - this could impact on ability to attend in future.

As recorded in July, when choosing whether to attend a cultural event or venue the 'enforcement' of safety restrictions and the number of other people attending/venue capacity are the most common considerations. However an increased percentage (10%) indicated that they would not consider attending until the vaccine was rolled out and effective.

Outdoor events appeal to many and could provide a 'safe' opportunity for audiences to experience live arts and culture

16% if the population would definitely be interested in attending cultural events outdoors if indoor venues were not available and 43% would probably be interested. Interest levels were highest amongst younger age groups, people with children and women with reasons given including the appeal of seeing a 'real' performance with a socially distanced audience, enjoyment of being in the fresh air and feeling that this would be a safe way to enjoy the arts.

When shown ideas on potential outdoor events 70% of the population stated that they would be interested in attending one or more with drive in cinema, open air concerts, drive in live events and park festivals of most appeal overall.

Views on changing social distancing requirements in arts and cultural venues are fairly polarised but a reduction to 1 metre with additional mitigation could be acceptable to many

Just under half of the population (46%) would feel very or fairly comfortable if social distancing requirements in indoor cultural venues were reduced from 2 metres to 1 metres with additional protections in place. This percentage increases to 60% amongst people aged under 35 and 54% amongst people with children.

Notably this is a somewhat lower percentage than recorded for the current 2 metre distancing scenario (69% feel comfortable attending) so a change could lead to decreased interest in attending amongst more cautious groups.

Background



The 2019 population survey undertaken by 56 Degree Insight for Creative Scotland clearly illustrated the importance of arts and creativity to the Scottish population. During 2019 over four in five adults living in Scotland took part in creative activities or attended or watched arts or creative pursuits. Specifically, almost half regularly attended the cinema (47%) and visited museums (44%) while over a third regularly visited historic properties (38%), attended live music events (34%) or went to galleries (33%).

Taking part in arts and creativity brings many benefits; the survey found that a large proportion of the population felt that it helped them to relax, made them feel good, improved their wellbeing and allowed them to learn something new. Not surprisingly given the benefits gained, around three in five Scots stated that they would like to take part in creative activities more often.

As well as these clear societal benefits obtained through arts, the creative sector is massively important to the Scottish economy. According to the Scottish Government's latest figures the creative sector employs more than 70,000 people and is worth almost £4 billion to the economy.

Creative Scotland's 10 year plan for the period 2014 to 2024 sought to build on this success, helping the sector to strengthen and grow, widening diversity in the sector and helping to promote Scotland across the world as a distinctive, creative nation.



A survey to track the population's behaviours and attitudes providing insights to support the sector's recovery from Covid 19

Creative Scotland's chief executive Iain Munro has described the scale and severity of the impacts of Covid-19 on the arts sector as daunting. Despite emergency support many arts venues fear for their future, particularly given the physical distancing measures likely to be in place for sometime into the future.

This research has therefore been commissioned by Creative Scotland to measure and track the population's behaviours and attitudes in relation to arts and cultural

consumption during this period, their demand to attend venues and event and their concerns and aspirations for the future.

As illustrated below, a number of key questions will be addressed by this research through a series of survey waves conducted with the Scottish population between July 2020 and early 2021.

When and how will the economic recovery of creative sectors in Scotland take place?

When will audiences return to engaging with cultural activity?

What are overall levels of desire to take part in out of home cultural activities?

How do these levels of desire vary by art forms and sectors, venue types and content of presented work?

How do these levels of desire vary by demographic groups and place of residence? e.g. age, health status, ethnicity, children in home.

What are the enablers of, and barriers to, audiences returning?

What factors will motivate the population to return when the time is right? e.g. health, wellbeing, education, social benefits which they miss.

What are the greatest concerns preventing return, from both broad concerns (e.g. R number, health issues) to specific ones relating to venue types, art forms, locations?

How will patterns of consumption and spending have changed?

How are overall levels of participation in different art forms changing and likely to change in near future?

How will changing needs impact on how the population seeks to consume different art forms.

What are the economic implications e.g. are audiences willing to pay for digital consumption or pay more to attend venues with low occupancy levels.

How will the picture vary between sub sectors, organisations, location and content?

What implications will all of this have for the cultural sector?

How will the impacts and implications vary across the sector?

A robust online approach tracking the Scottish population's behaviours and attitudes

- It is planned that three or four waves of research will be undertaken between July 2020 and early 2021 to measure and track the Scottish adult population's behaviours and attitudes toward arts attendance. This report provides results from the second wave of this study.
- An online approach has been used with fieldwork for the second wave undertaken between the 6th and 23rd November (*note that the full launch of fieldwork coincided with the first announcement of an effective vaccine on 9th November*). The first wave took place from 27th July and 2nd August.
- 1,101 interviews were conducted in the second survey wave with sample drawn from the Dynata online panel. Geographic and demographic quota controls were used to ensure that the sample was representative of the population. Also an additional boost of 100 interviews was conducted with members of the BAME population to allow for separate analysis of results on the basis of this group.
- The table on the right illustrates the unweighted profile of the sample by key demographics. Note that weighting has been applied at the data analysis stage to correct for any imbalances between the sample and population profile including adjusting for the over-representative of the BAME population within the unweighted sample.

	Sample size
Sex	
Male	506
Female	595
Age	
16-34	275
35-54	387
55+	439
Socio-economic group	
ABC1	646
C2DE	455
Ethnicity	
White	982
BAME	116



Cultural engagement during the pandemic

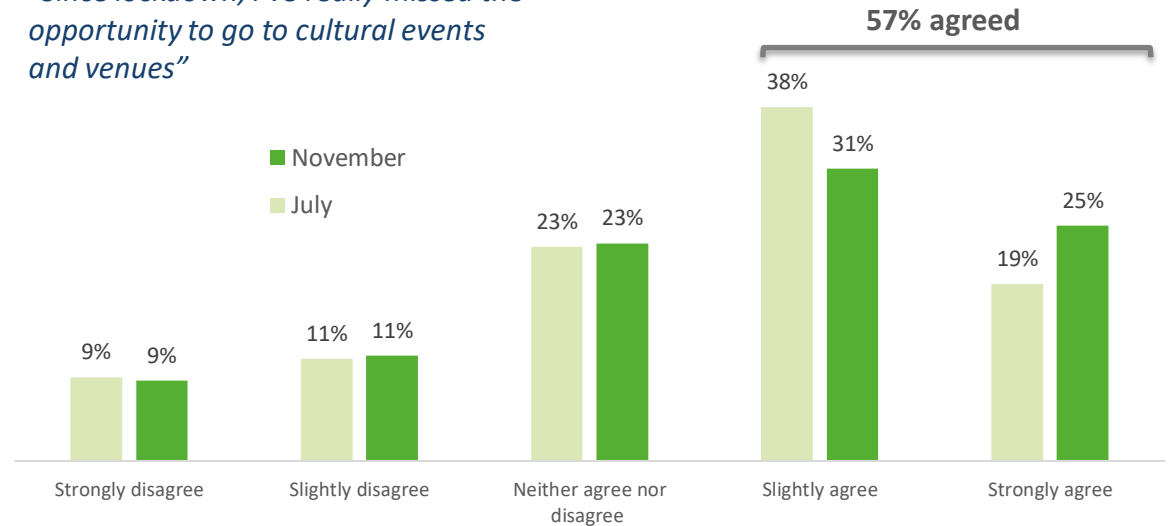


Over half of the population continue to really miss attending cultural venues and events

- Reflecting on the period since the initial lockdown began in late March, 57% of the population either slightly agree or strongly that they have missed the opportunity to go to cultural events and venues.
- While this percentage is consistent with that recorded in the July survey wave, it is notable that in the more recent November wave the percentage stating that they 'strongly agree' had increased from 19% to 25%.
- The percentage who strongly agree with this statement is higher amongst certain demographic groups including those in the more affluent ABC1 socio-economic groups (36% vs 26% of C2DEs) and residents of the 10% least deprived areas (41% vs 32% in 10% most deprived).
- Also, as would be expected agreement was higher amongst people who also agreed that arts and culture were an important part of their lives (35% strongly agreed, 45% slightly agreed).

Figure 1 – Level of agreement with statement

“Since lockdown, I’ve really missed the opportunity to go to cultural events and venues”

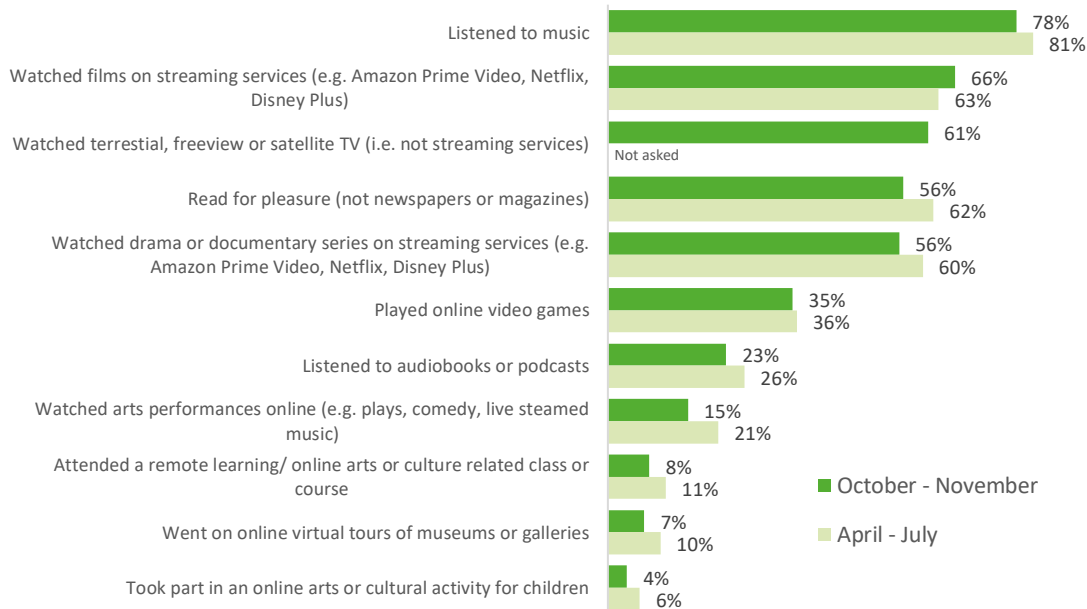


9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,101

Levels of participation in cultural activities undertaken at home have remained high

- Respondents were asked if they had undertaken any of the activities shown in Figure 2 while at home. In the first survey wave the question related to the period between the start of lockdown and July while in the second wave it related to the 4 weeks prior to interview (i.e. from mid October to mid November).
- In both periods the majority of the population had listened to music, watched streaming services and read for pleasure.
- Comparing the periods, participation in some of the activities was lower in the more recent period – in particular watching or attending online events, classes, tours or children’s activities.
- Participation varied by age with those aged under 35 more likely to watch streaming services, play online games, listen to audiobooks & podcasts, watch online performances or attend online learning.
- Also members of the BAME population were more likely to play online video games (57%) or listen to audio books or podcasts (40%).

Figure 2 – Activities undertaken at home during pandemic

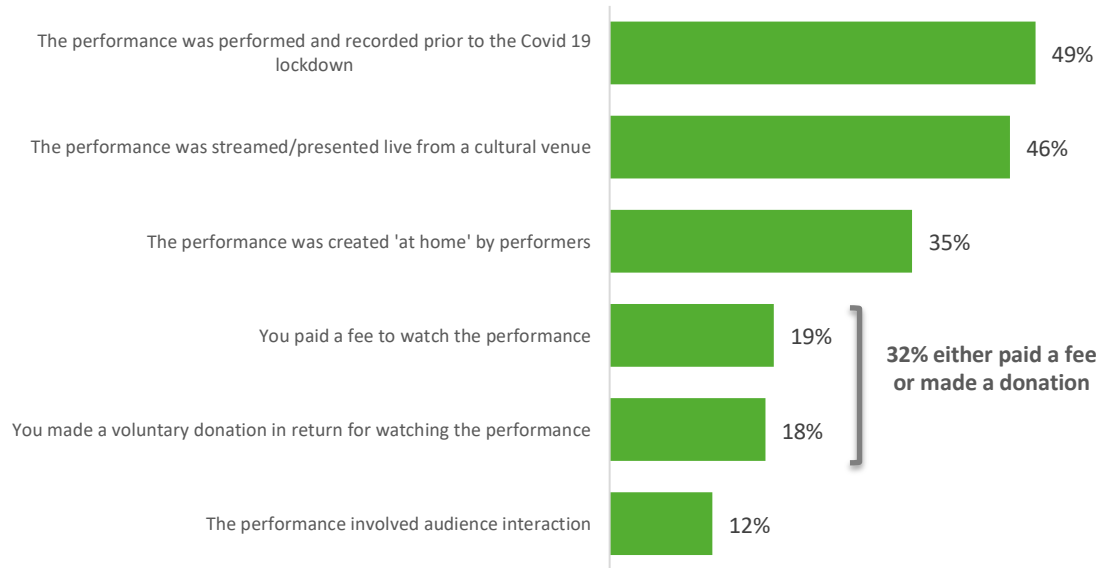


7) During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,101

A range of types of online performances were watched, usually at no cost

- The online performances watched at home were in a variety of formats.
- While around half (49%) watched recordings of performances prior to Covid 19, a similar percentage (46%) watched live performances streamed from a cultural venue.
- About a third of those who had watched an online performance had either paid or made a voluntary donation in exchange for the opportunity to watch (32%).

Figure 3 – Nature of online arts performances watched in last 4 weeks

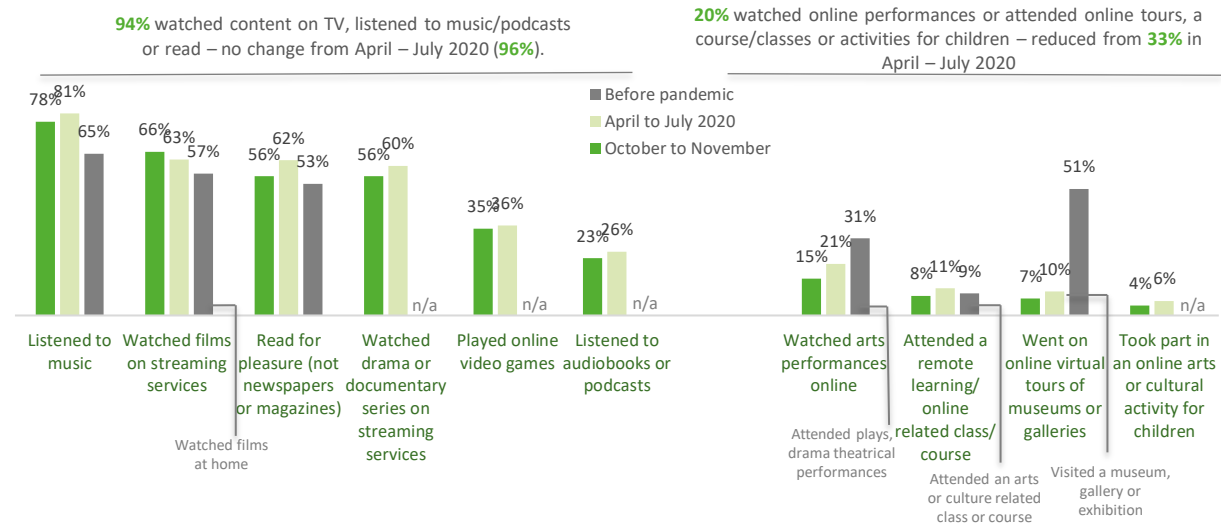


7) Which of the following statements, if any, were applicable to any of the performances you watched online during this period. Base, respondents that watched performances online = 171

The percentage of the population engaging with content which might substitute a physical attendance at a venue or event has declined

- Figure 4 distinguishes those cultural activities undertaken at home where the participant viewed or listened to existing content, such as music or films, from those activities which provided more direct replacements for activities previously attended out of home - for example viewing arts performances online, attending online tours or attending courses of other activities online.
- This distinction shows that in both time periods the vast majority took part in the first set of activities, viewing or listening to existing content (94% in Oct-Nov). Where data is available, we see increases in levels of participation in all of these activities compared to those seen before lockdown.
- However a smaller percentage had participated in the 'substitute' activities and levels of participation in all of these activities were lower than the equivalent activities pre-lockdown. Notably, overall levels of participation in these activities had also declined since the April to July period from 33% of the population to 20%.

Figure 4 – Activities undertaken at home during lockdown - comparison to pre-lockdown participation (pre lockdown definitions included where different. Listening to music, watching films and reading from 2019 Creative Scotland population survey)

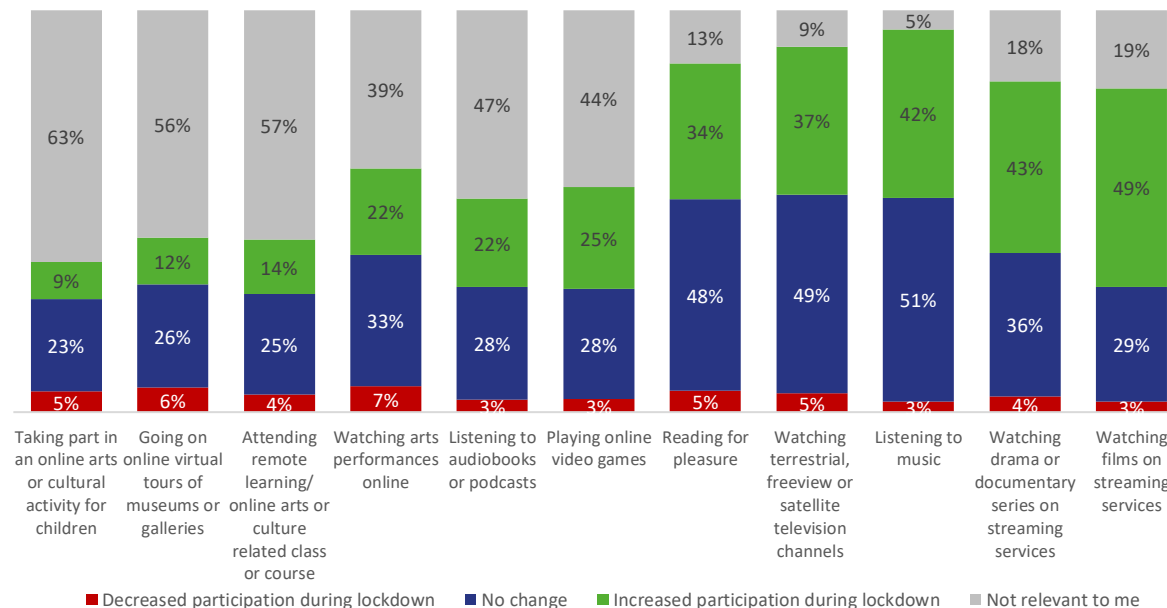


7) During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,101

Most of the population continued to participate in at home cultural activities more often than a year ago

- As shown in Figure 5, survey respondents were asked to indicate whether their participation in at home cultural activities during the preceding 4 week period (i.e. mid October to mid November) had increased, decreased or not changed in comparison to the same period in 2019. A response of ‘not relevant to me’ could also be provided.
- While a very small percentage of the population decreased their participation in any of the activities asked about, over a third reported increasing their participation in listening to music, watching drama, documentaries or films on streaming services, watching terrestrial, Freeview or satellite television (i.e. not streaming services) or reading for pleasure compared to a year ago.

Figure 5 – How participation levels during October – November have changed compared to same period in 2019



8) Compared to the same period in 2019, how much, if at all, has the amount that you do these cultural activities at home changed? Base, all respondents = 1,101

Participation increased most for watching television, listening to music, reading, gaming and listening to audiobooks and podcasts

Figure 6 – How participation levels have changed during lockdown
- net change excluding those stating activities were 'not relevant'

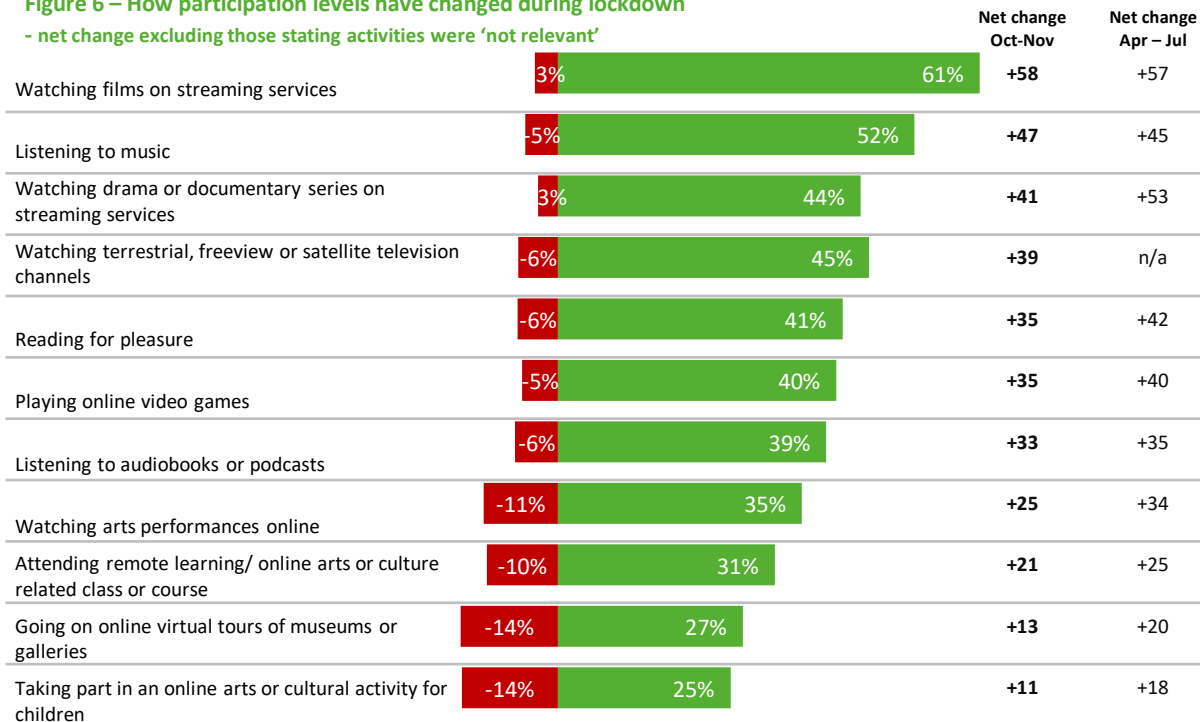


Figure 6 summarises changing levels of participation in at home activities, comparing the percentage who increased participation with the percentage decreasing participation to obtain an estimate of the net change.

This comparison further illustrates the scale of increased participation in every activity, particularly watching both streamed and broadcast television and listening to music.

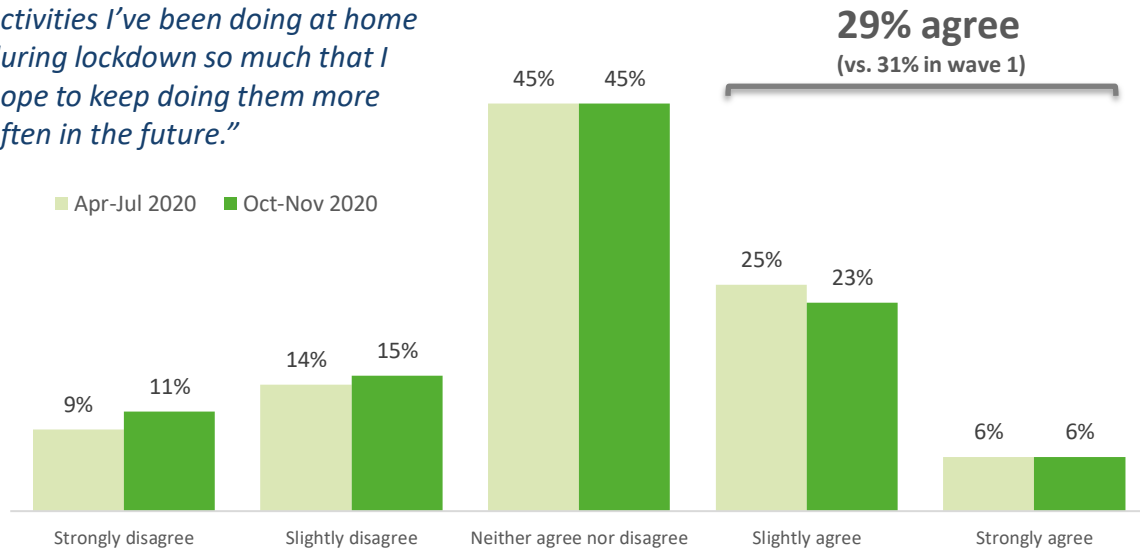
Comparing the October to November period with April to July while the increased levels of watching films and listening to music are similar, the level of year on year increases in other activities are lower. This is particularly the case for 'substitute' activities such as watching arts performances online or virtual tours of museums or galleries.

Less than 3 in 10 would like to continue to take part in at home cultural activities more often in the future

- Although many people are experiencing taking part in cultural activities at home more often during the pandemic, few would like to continue these increased levels of participation longer term.
- Specifically, as shown in Figure 7, just under 3 in 10 agreed that they had enjoyed the cultural activities they'd done at home so much that they would like to continue to do these more often longer term.
- Similar results were obtained in both waves of the survey.

Figure 7 – Changing attitudes to cultural events and activities during lockdown

“I’ve enjoyed some of the cultural activities I’ve been doing at home during lockdown so much that I hope to keep doing them more often in the future.”



9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,101

Only around 1 in 6 would be open to paying for the online cultural content they have seen during lockdown in future

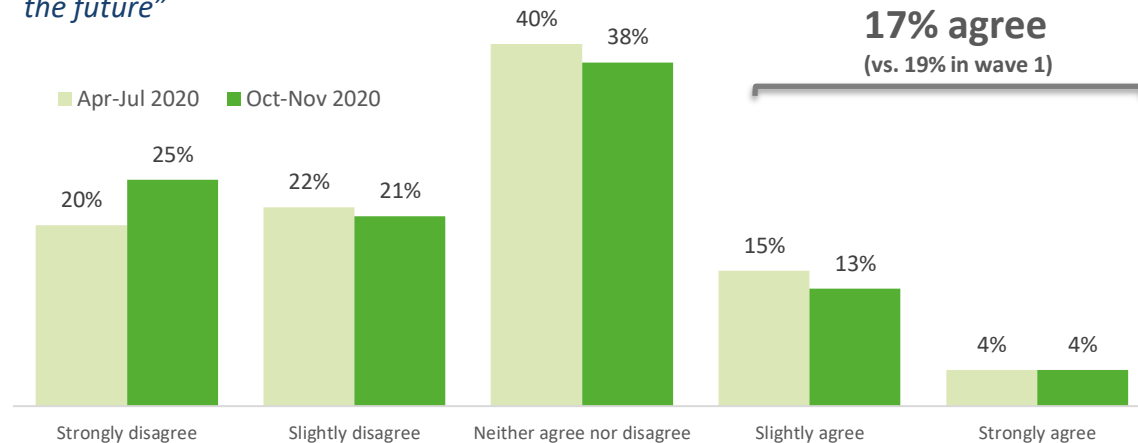
- As shown in Figure 8, only around 1 in 6 (17%) of the population agreed that they would pay to access cultural activity online in the future while 46% disagreed with this statement (25% strongly).

- The percentage disagreeing with this statement had increased since the first wave of surveying in July.

- These results suggests that at the population level there is a limited appetite for paid for online content. Further details on this area are provided on page 37.

Figure 8 – Changing attitudes to cultural events and activities during lockdown

“I’ve enjoyed accessing cultural activity online so much that I would be willing to pay for this activity in the future”



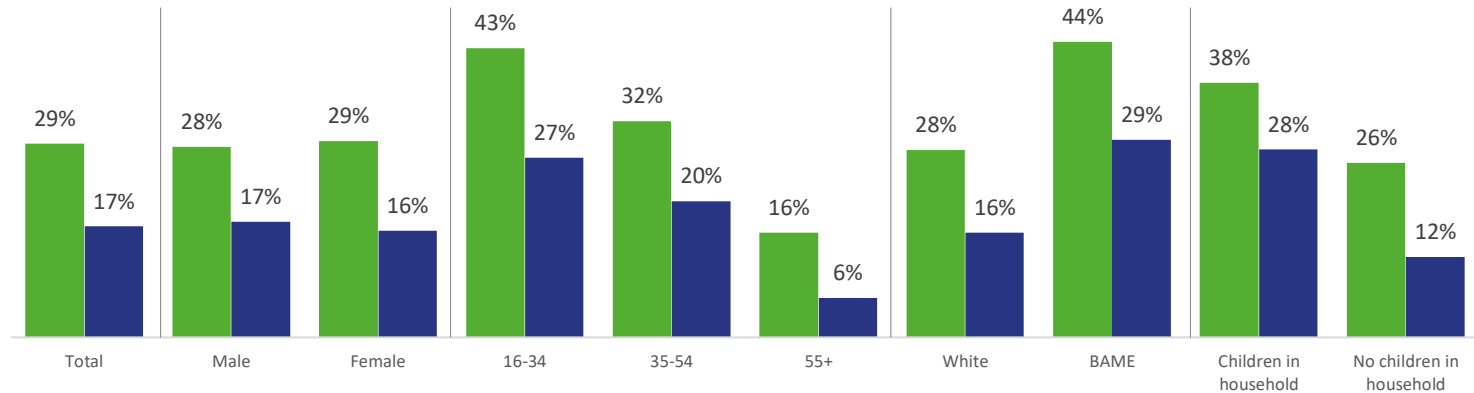
9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,101

Openness to access more online cultural content or pay for it is higher amongst certain demographic groups

Figure 9 – Percentage who agree with statements by key demographics

■ I've enjoyed some of the cultural activities I've been doing at home during lockdown so much that I hope to keep doing them more often in the future

■ I've enjoyed accessing cultural activity on line so much that I would be willing to pay for this activity in the future

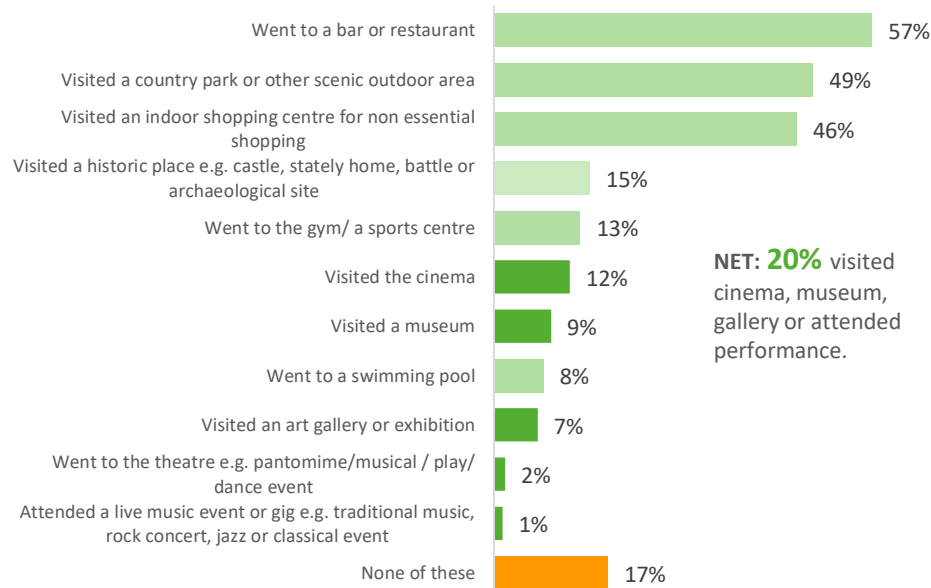


9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,101

A fifth of the population took part in an 'out of home' cultural activity since lockdown rules eased in the summer

- 83% of the population had undertaken one or more of the activities listed in Figure 10 in Scotland since the initial easing of lockdown rules in the summer.
- As shown the largest percentages had visited a bar or a restaurant, gone to a country park or other scenic outdoor area or gone to a shopping centre for non-essential shopping.
- Overall 20% had undertaken 1 or more of the cultural activities included in the question with 12% visiting the cinema, 9% going to a museum and 7% going to an art gallery.

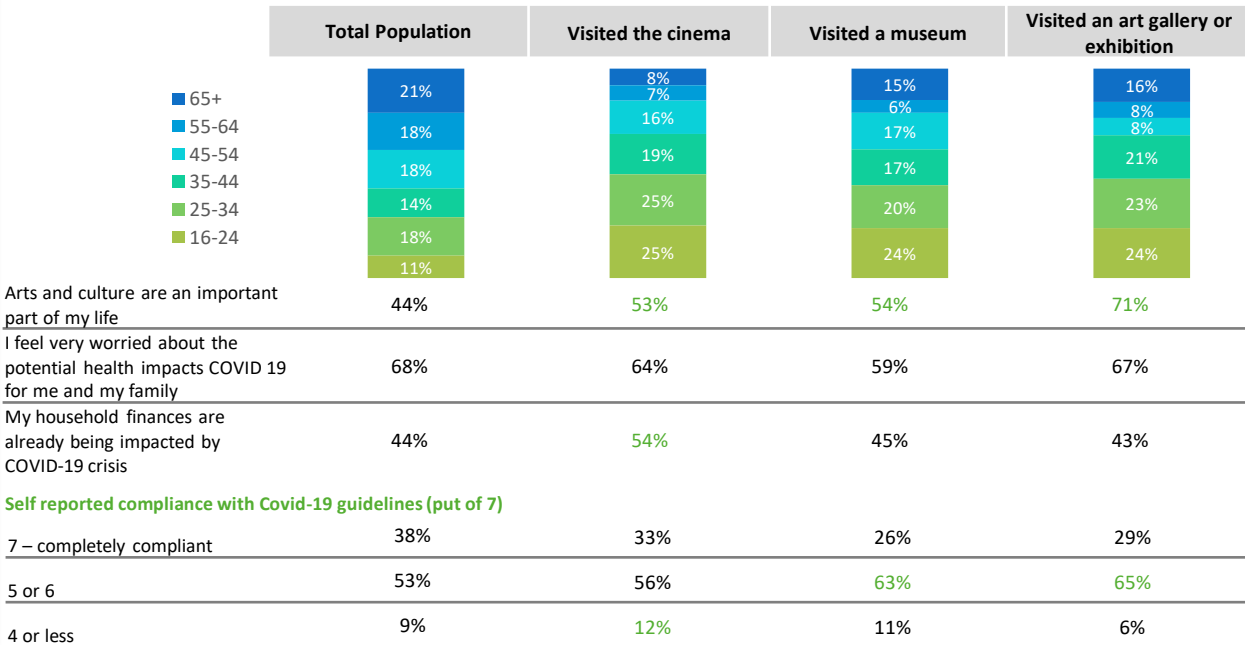
Figure 10 – Activities done in Scotland since the initial easing of lockdown rules in the summer



10b) Which of the following activities, if any, have you done in Scotland since the initial easing of lockdown rules this summer? Base, all respondents = 1,101

Younger people were more likely to have attended cultural activities since the easing of lockdown in the summer

Figure 11 – Profile of those taking part in cultural activities since easing of lockdown

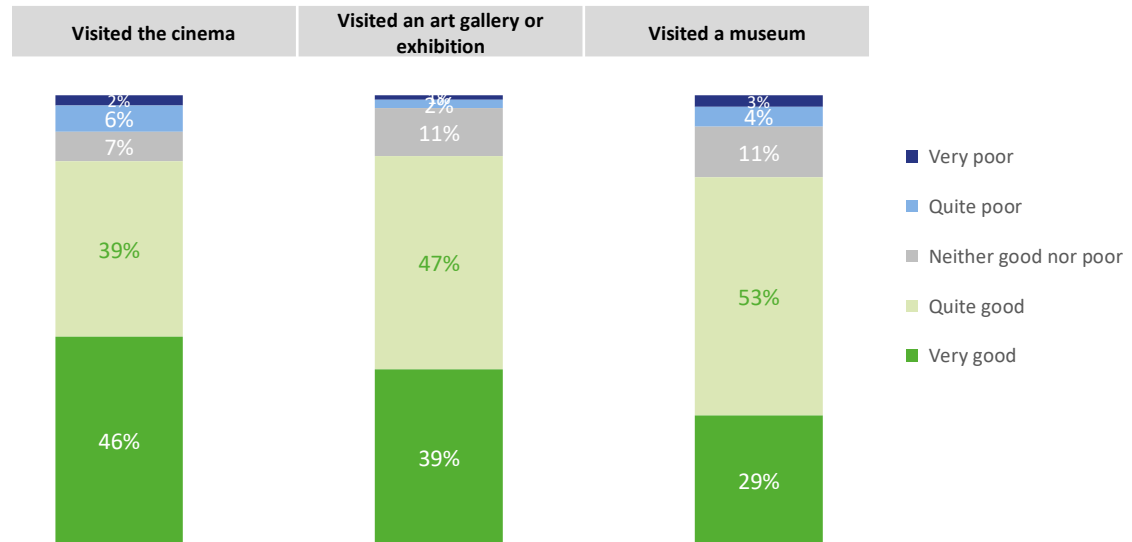


- Figure 11 illustrates how the profile of those people who had been to the cinema, a museum or an art gallery varied from the overall population profile.
- Participants in all of these activities were likely to be younger and more likely than the population average to agree that arts and culture were an important part of their life.
- Participants in all three activities were also less likely than the population average to rate their compliance to Covid-19 regulations at the highest level (7 out of 7).
- Also, those who had been to the cinema were more likely than the population average to indicate that the crisis was impacting on their household finances.

Experiences of cultural activities attended are varied with many rating gallery and museum experiences as 'quite good'

- As shown in Figure 12 when those people who had attended the cinema, an art gallery/ exhibition or a museum were asked to rate their experiences, the top rating of 'very good' was selected by fewer than half of attendees.
- Overall cinema experiences obtained the most positive ratings but for all three activities a large share stated that the experience was just 'quite good' or provided a less positive rating.
- When respondents were asked to comment further on the experience, those who provided positive ratings most frequently referenced aspects such as particularly enjoying the experience after not attending for so long, being pleased with good adherence to safety rules and the event being well organised. However those with less positive experiences most commonly referenced other people not following social distancing rules, concerns over crowding or that the need to follow Covid-19 related requirements had reduced the quality of their experience.

Figure 12 – Satisfaction with cultural activities undertaken since easing of lockdown



12b) How would you rate the quality of your experience? Based on respondents who had taken part since rules eased: Cinema= 129, Museum =90, Art gallery or exhibition =75

Desires and plans to attend as restrictions are eased



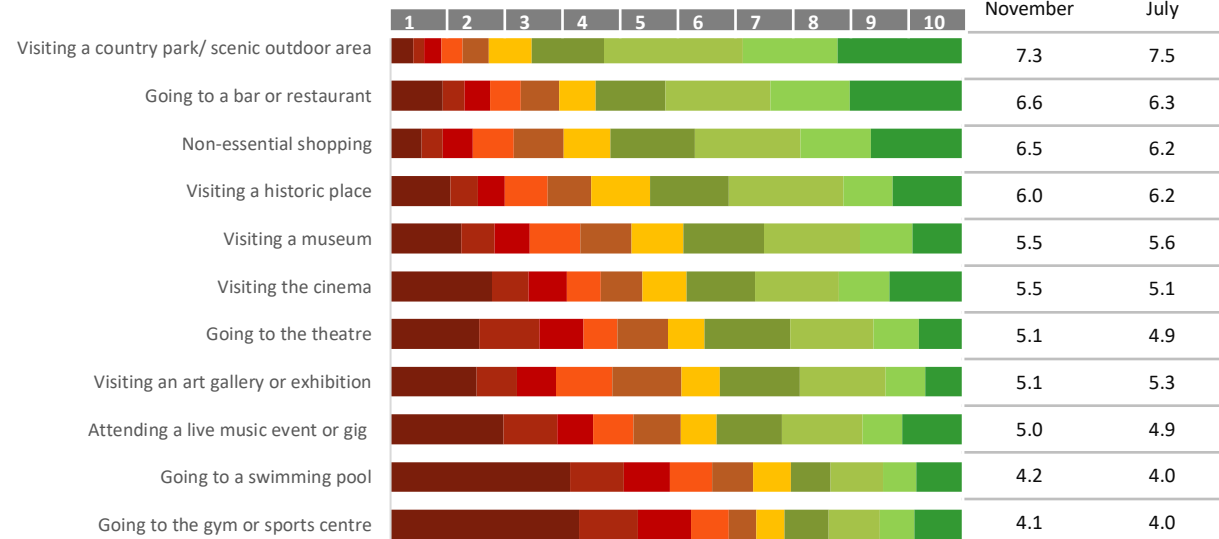
Levels of desire to attend arts and cultural venues remain polarised - while some are keen to attend when they can, others are wary

- Respondents were asked to rate their desire to take part in a range of leisure activities, including some cultural activities and a number of comparators.
- The ratings provided in November are in a similar order to those recorded in July with willingness to visit country parks and other outdoor areas highest (an average of 7.3 out of 10), while levels of consideration for indoor activities were much more varied.
- Desire to take part in some of the activities which have re-opened over the summer increased slightly between July and November with a higher average index recorded for going to a bar or restaurant, doing non essential shopping and attending the cinema.
- However, in general the desire to attend cultural activities remains very polarised with many people providing ratings of under 5 suggesting that they are unlikely to attend soon when venues reopened.

Figure 13 – Desire to take part in cultural and other leisure activities

Thinking about how you feel at the moment, please rate each of the following activities on a scale from 1 to 10, where 1 is 'Extremely unlikely to be the type of activity I would consider doing' and 10 is 'Extremely likely to be the type of activity I would do'

- Where the activities are already possible because venues are open, base your answer on how you feel about doing them now.
- Where venues are still closed, base your answer on how you feel about doing them when they re-open

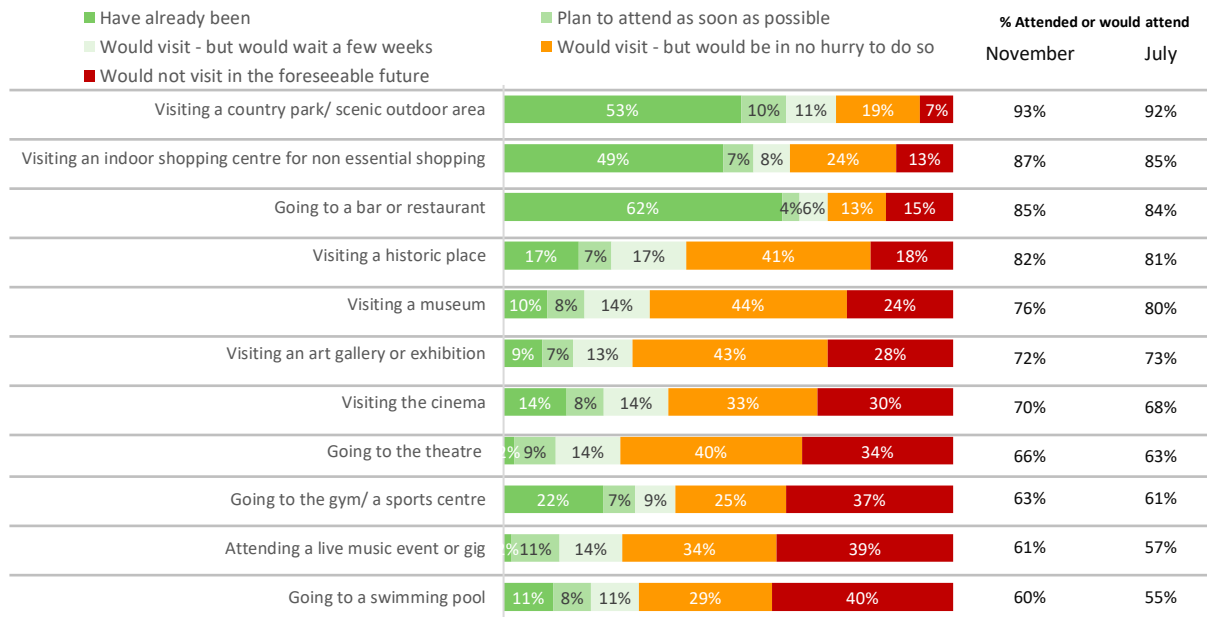


Base, all respondents = 1,101

As things stand, most people feel that they will take their time or are altogether reluctant to return to arts venues

- When asked when they would visit the same list of cultural and other leisure activities, a similar order of responses was obtained as seen in the question relating to desire to participate again (see Figure 13).
- A large proportion of the Scottish population had already been to outdoor places, shopping centres and bars and restaurants.
- However, many stated that they would be in no hurry or would not visit cultural venues when this was possible. Specifically over a third stated that they would not visit a theatre or live music event in the foreseeable future (34% and 40% respectively).
- Comparing the percentages who would attend in future (including 'in no hurry') in the July and November survey waves suggests that openness to attend the theatre and live music events when possible increased marginally.

Figure 14 – When plan to take part in cultural and other leisure activities

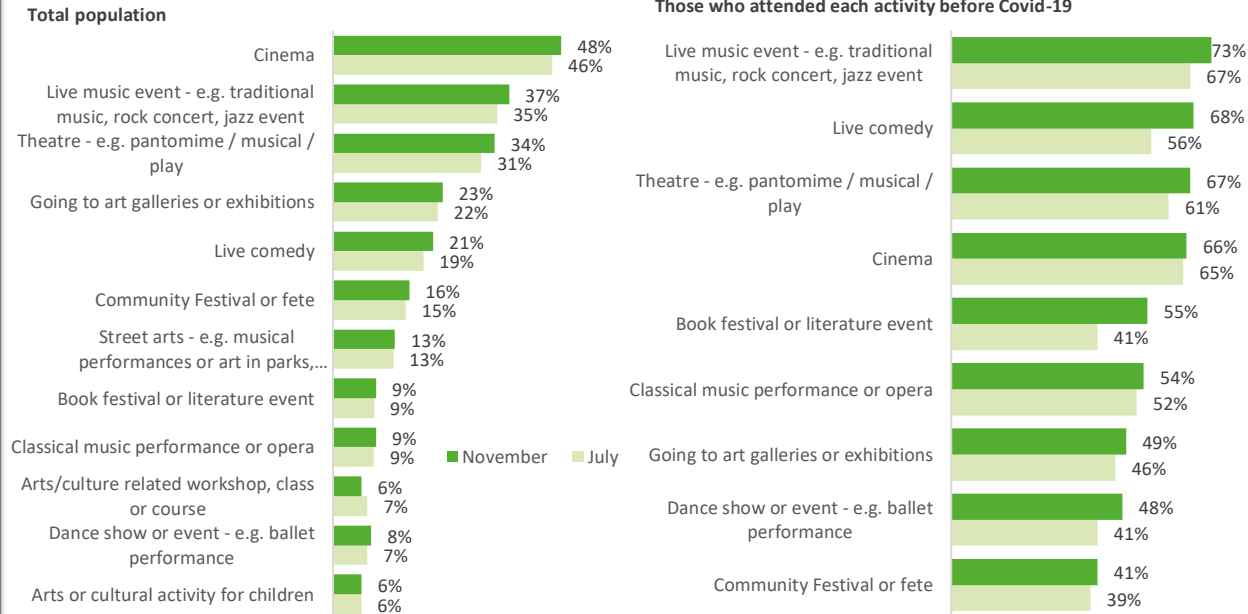


Q11 Which, if any, of the following best describes when, if at all, you would feel happy to go to each of these places once lockdown rules allow (excludes Don't Know and Not applicable responses for each activity). Base: all respondents = 1,101

Audiences especially look forward to returning to live music, comedy, theatre and the cinema

- Respondents were asked to specify the arts activities they most look forward to attending again in the future. Figure 15 illustrates the overall population level results and the results amongst those who had attended each of these activities in the 12 months before lockdown.
- At the overall population level the results obtained in the July and November survey waves were fairly consistent. Around half of the population (48%) most look forward to attending the cinema again in the future.
- As would be expected people who attended in the 12 months before lockdown were much more likely to look forward to attending again in the future and, for these people, levels of interest in returning had increased between July and November.
- The highest levels were recorded in relation to attending live music (73%), live comedy (68%), theatre (67%) and the cinema (66%).

Figure 15 – Arts and cultural activities most look forward to attending in future

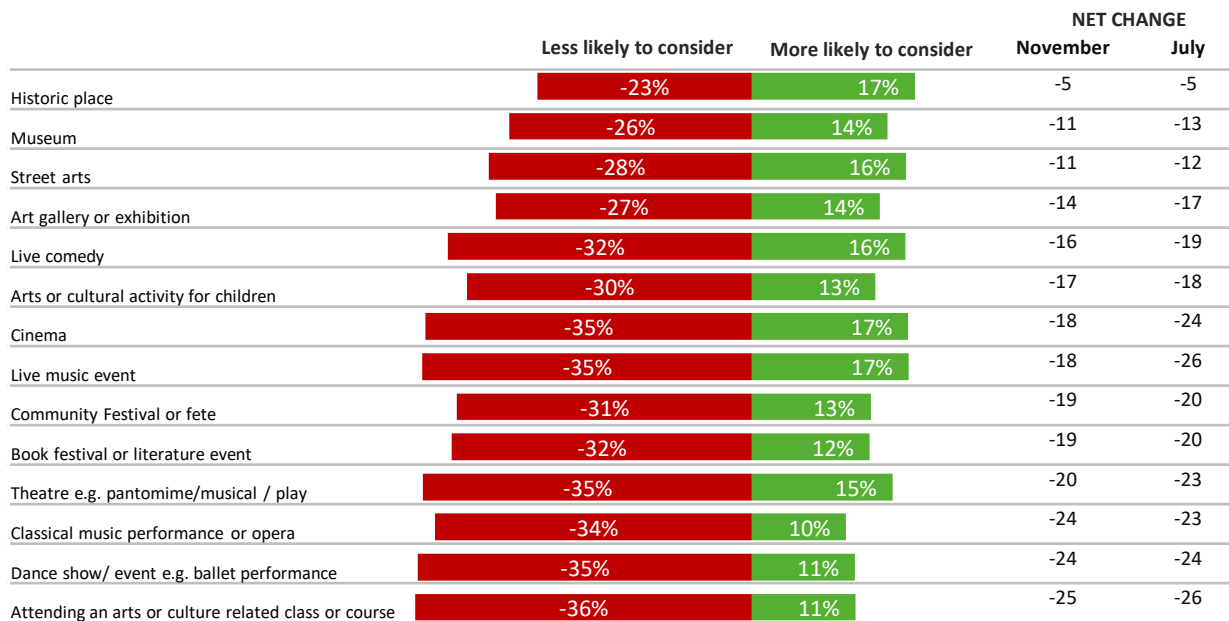


Q12 Thinking in more detail about specific arts and cultural activities, which of the following, if any, do you most look forward to attending in the future when it is possible?}.
Base: all respondents = 1,101

However compared to before the pandemic demand for all types of arts events remain suppressed

- Respondents were asked how, if at all, their consideration for different cultural activities and events had changed compared to prior to COVID 19 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').
- Figure 16 summarises the results excluding those who would not have considered an activity and including the net change recorded in both the November and July survey waves (% more likely minus % less likely).
- On the whole demand for all of the cultural activities asked about remains lower than before COVID 19.
- However this is more the case for certain activities than others. Activities which could feasibly take place outdoors or in spacious, uncrowded venues continue to be less negatively impacted.
- Comparing the net results for July and November suggest that the picture has become slightly less negative for certain activities, in particular attending cinema and live music.

Figure 16 – How preferences have changed as a result of COVID 19 outbreak



Q13A Please indicate the extent to which your preferences have changed (if at all) compared with what you might have chosen to do before the COVID-19 outbreak (NET changes in consideration, excluding those who would not consider in any case). Base: all respondents = 1,101

Younger people and those who are less worried about the health impacts of Covid-19 are less likely to be put off attending

Figure 16 – How preferences have changed as a result of COVID 19 outbreak – Net change by Age and levels of concern about COVID-19

NET CHANGE	Age			Very worried about health impact of COVID-19		
	16-34	35-54	55+	Agree	Disagree	
-5%	Historic place	3%	-6%	-12%	-8%	+12%
-11%	Museum	-1%	-12%	-19%	-13%	+6%
-11%	Street arts	3%	-12%	-25%	-14%	+9%
-14%	Art gallery or exhibition	-5%	-16%	-18%	-17%	+1%
-16%	Live comedy	0%	-18%	-32%	-20%	+14%
-17%	Arts or cultural activity for children	-1%	-20%	-33%	-21%	+6%
-18%	Cinema	-3%	-15%	-35%	-21%	+1%
-18%	Live music event	-4%	-20%	-31%	-24%	+13%
-19%	Community Festival or fete	-8%	-17%	-29%	-22%	-1%
-19%	Book festival or literature event	-11%	-19%	-29%	-24%	+7%
-20%	Theatre e.g. pantomime/musical / play	-10%	-19%	-30%	-25%	+1%
-24%	Classical music performance or opera	-7%	-29%	-33%	-30%	+6%
-24%	Dance show/ event e.g. ballet performance	-12%	-28%	-35%	-31%	+5%
-25%	Attending an arts or culture related class	-16%	-22%	-39%	-29%	-6%

Q13A Please indicate the extent to which your preferences have changed (if at all) compared with what you might have chosen to do before the COVID-19 outbreak

- Figure 16 compares the 'net' impact of Covid-19 on consideration of the different arts and cultural activities amongst different age groups and amongst those who are and are not very worried about the health impact of the virus.
- It is clear that the negative impact of the virus on consideration levels increases with age and is also correlated to levels of concern about the health impacts.

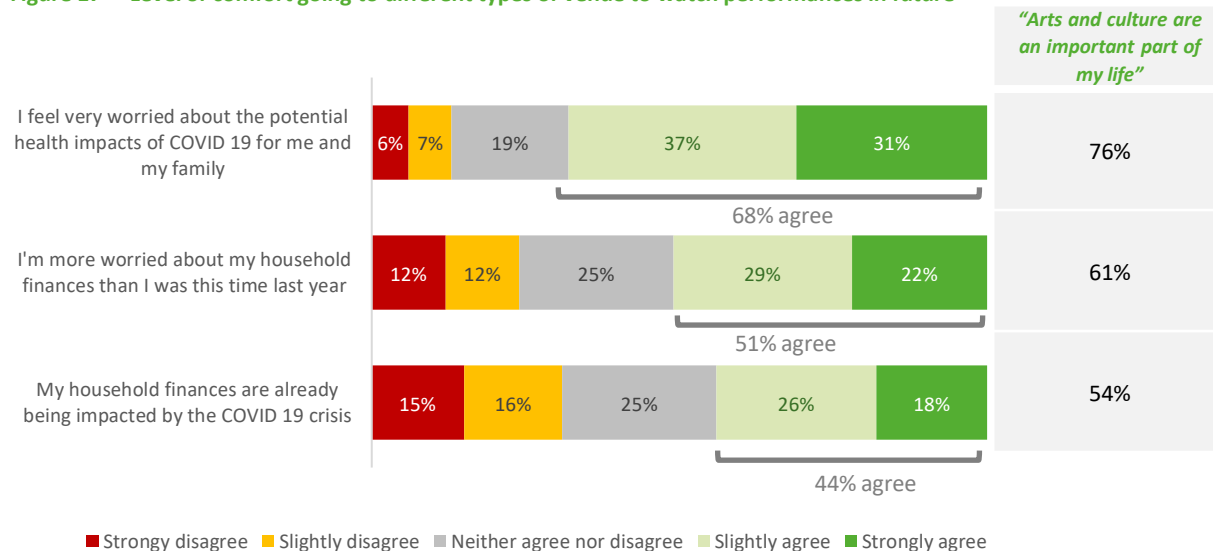
Understanding changing attitudes to attendance



The population are worried about the impacts of Covid-19 with concerns higher amongst those who see art & culture as an important part of life

- As context to help understand views towards arts and cultural attendance in the future, respondents were asked about their levels of concern regarding the health and financial impacts of the pandemic.
- As shown in Figure 17, two thirds of the population (68%) agreed that they were very worried about the potential health impacts but this proportion increased to 76% amongst those who felt that arts and culture were important in their life. This concern also increased with age from 65% of those aged under 45 to 74% aged 65+.
- Around half (51%) agreed 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. These concerns were also higher amongst women, younger age groups, families and members of the C2DE socio-economic groups.

Figure 17 – Level of comfort going to different types of venue to watch performances in future

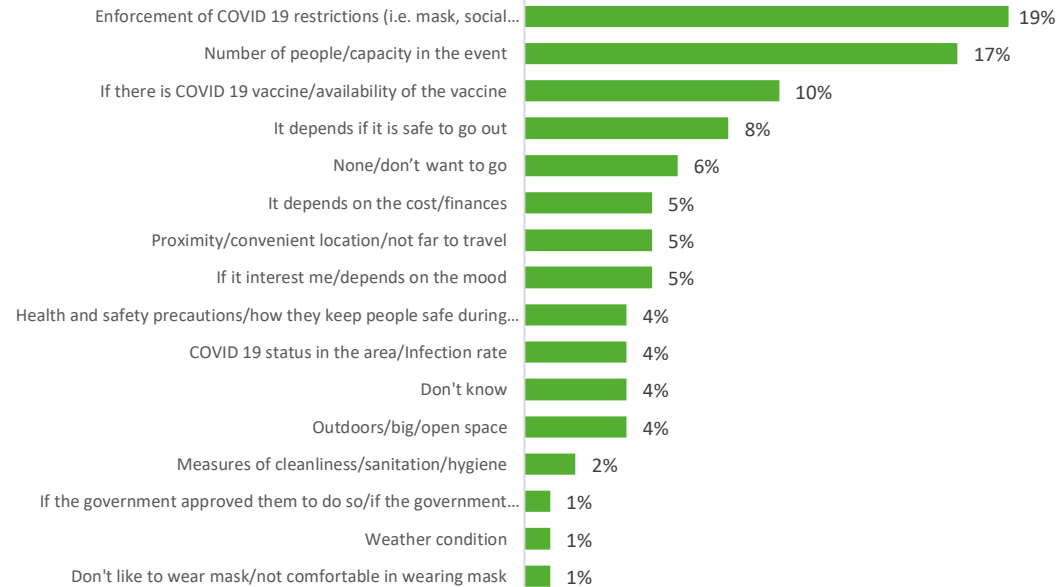


Q18 Please indicate if you personally agree or disagree with the following statements.. Base: all respondents = 1,101

While enforcement of restrictions at venues remain important, an increasing percentage will wait for the vaccine before attending again

Figure 18 – Factors important when deciding on whether to attend arts and cultural activities

In your own words, please tell us about the factors that would be important when you are deciding on whether to attend different arts and cultural activities such as those listed in the last question? For example, give details on what would affect your decision to go at all and when and where to attend.



Base: all respondents = 1,101

- Respondents were asked to comment on the factors that would be important to them when deciding on whether to attend different arts and cultural activities.
- The most frequently provided responses related to having confidence that venues were enforcing the required restrictions and that controls on the numbers of people attending were in place.
- Also 1 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 comparison to the responses obtained when a similar question was asked in the July survey wave, the percentage of people mentioning the enforcement of restrictions and hygiene practices at venues decreased while references of waiting for the vaccine increased.

Assurances on safety are needed for many to feel comfortable attending indoor arts venues in future

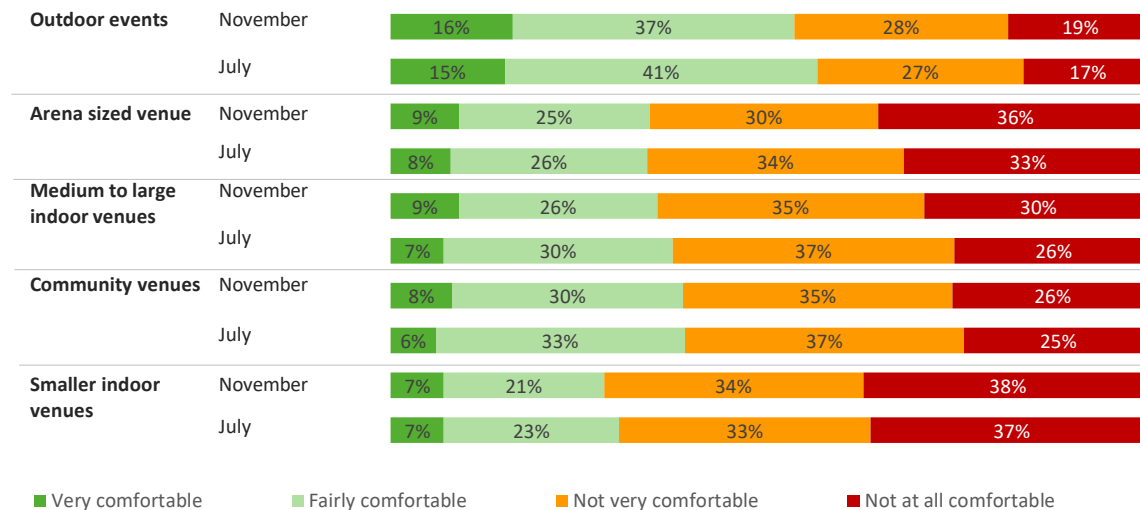
Respondents were asked how comfortable they would feel attending performances at a range of venue types. Responses could be selected from the following range:

- *Very comfortable – no difference in appeal to before COVID 19*
- *Fairly comfortable – would attend whilst staying aware of and avoiding any risks*
- *Not very comfortable – would prefer not to attend unless I had assurances on safety measures in place*
- *Not at all comfortable – would avoid for foreseeable future*

Similar results were obtained in July and November with over half feeling very or fairly comfortable attending outdoor events while large proportions would not attend the other types of venue for the foreseeable future or would only attend if they had assurances on safety measures in place.

In general people more likely to feel comfortable attending indoor venues included younger age groups, families, residents of urban areas and those who were less worried about the health impacts of the virus.

Figure 19 – Level of comfort going to different types of venue to watch performances in future



Q15 Thinking more specifically about the types of place that arts and cultural activities could take place in, how do you feel about going to the following types of place to watch performances in the near future? Base: all respondents = 1,003

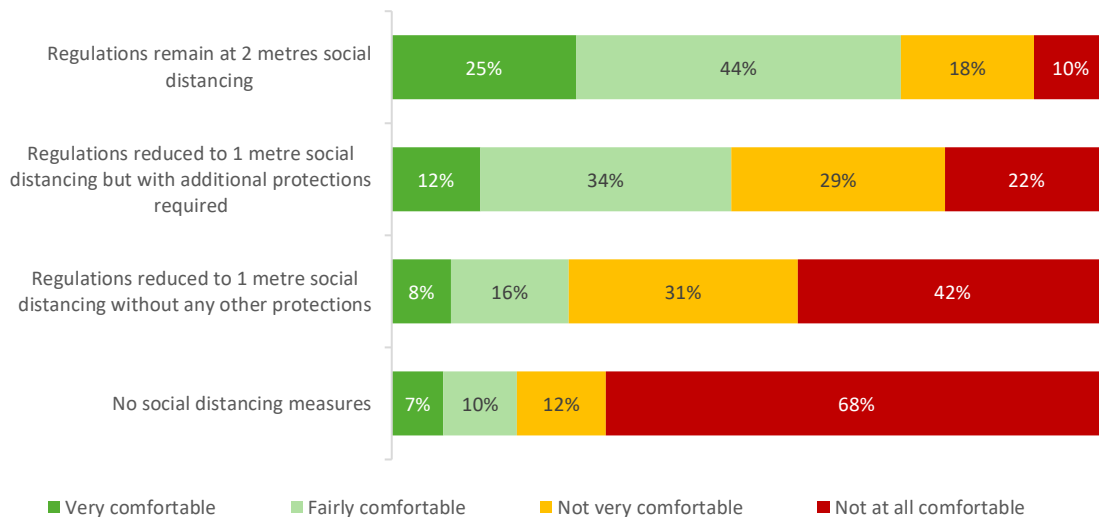
Nearly half of the population would accept a reduction to 1 metre social distancing restrictions in venues but additional protections would be vital

- Respondents were asked how comfortable they would feel attending indoor cultural venues in the near future with the range of social distancing requirements shown in Figure 20.

- Overall 69% of the population were very or fairly comfortable with regulations remaining at the current 2 metre distancing requirement while a similar sized percentage (68%) were 'not at all comfortable' with there being no social distancing measures in place at all.

- 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. Overall 46% of the population would feel very or fairly comfortable with this scenario but this percentage was higher amongst people aged under 35 (60%) and those with children at home (54%). However a lower percentage of those aged 55 and over (34%) and people who were very worried about the health impacts of the virus (39%) felt comfortable with this option.

Figure 20 – Level of comfort with different social distancing scenarios when visiting indoor cultural venues in future

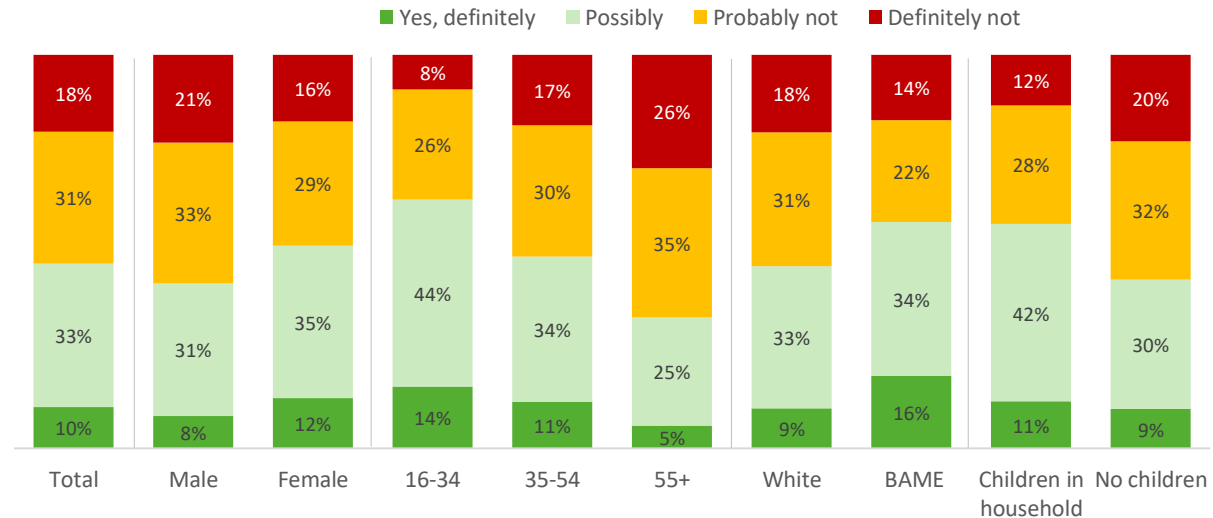


Q15 Thinking of the cultural events and places you might go to in the near future, we are keen to understand how you feel about social distancing restrictions that you might face if you were to go to indoor cultural venues (e.g. a museum, gallery, cinema or theatre). In this situation how comfortable would you feel about the following?
Base: all respondents = 1,101

In general, interest in engaging with cultural events online is low but higher amongst younger people, the BAME population and families

- While just 10% of the population would definitely be interested in engaging with online cultural events if they were unable to attend a venue, a further third (33%) stated that they would possibly be interested.
- As shown in Figure 21, levels of interest were higher amongst women, younger age groups, the BAME population and people with children in their household.
- When asked to give more details on their responses, common responses amongst those who stated that online events appealed to them included enjoying these types of event as an alternative way to experience artists safely and online being the only option at a time when other options were not available. However those who were not interested commented on issues such as the lack of atmosphere, not being able to enjoy the audience interaction, a feeling that the experience would be no better than watching television or just a general lack of interest.

Figure 21 – Interest in engaging with cultural events online if unable to go to events in a venue

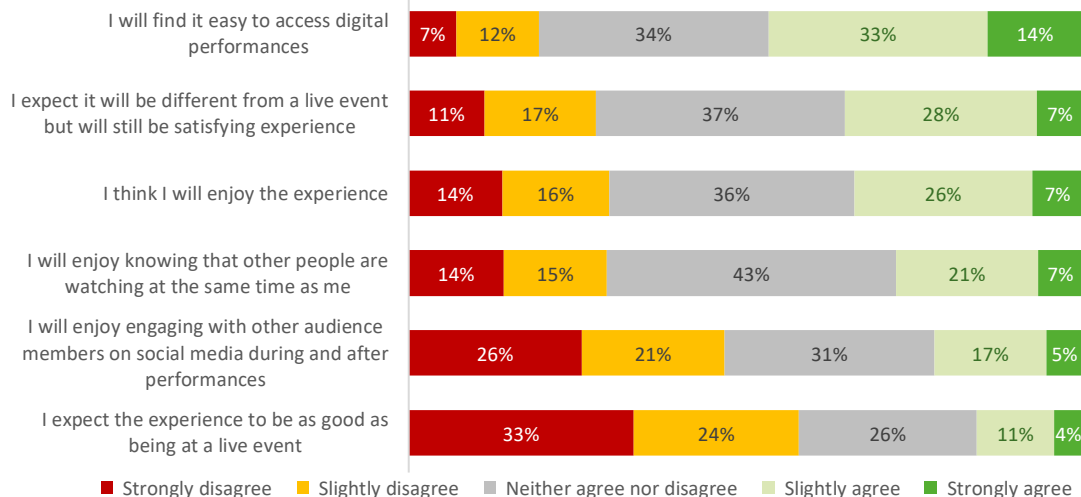


Q15D If you were unable to go to cultural events in a venue for the foreseeable future, would you be interested in engaging with cultural events online?
Base: all respondents = 1,101

Few perceived online events to be as good as a live event and options such as interacting with other audience members were unappealing for most

- To further understand potential opportunities for online cultural events, respondents were asked whether they agreed or disagreed with the series of statements shown in Figure 22.
- Overall while almost half agreed that it would be easy to access digital performances (47%), in general reactions were negative with only a third agreeing that they would enjoy the experience and smaller percentages expecting that they would enjoy knowing that other people were watching live at the same time or being able to engage with other audience members.

Figure 22 – Attitudes towards attending online cultural events

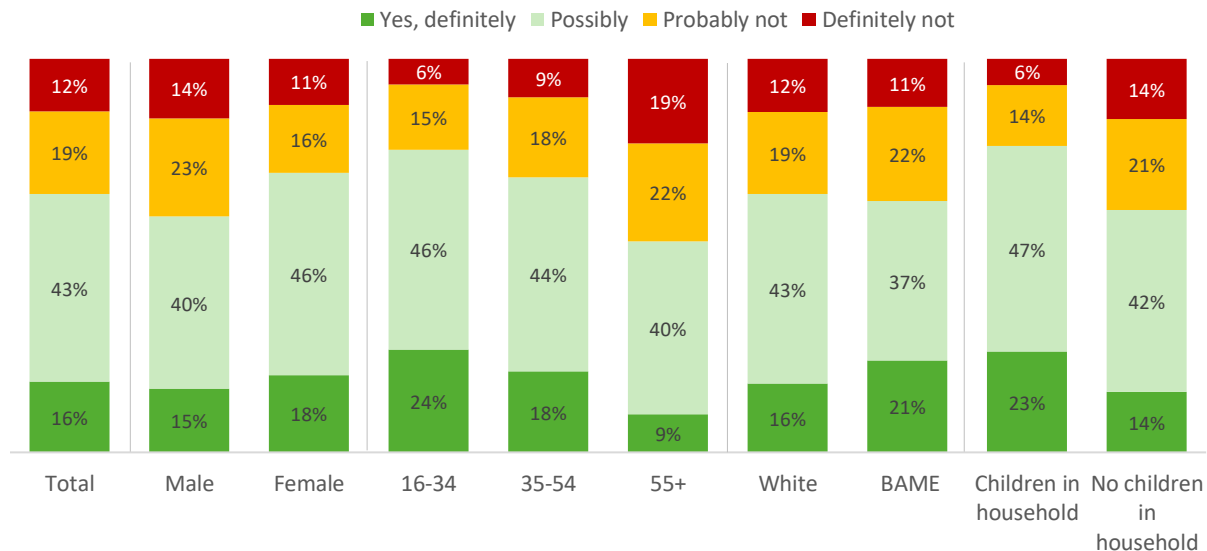


Q15F To what extent do you agree or disagree with the following statements regarding your expectations for online cultural events?
Base: all respondents = 1,101

Around 3 in 5 are definitely or possibly interested in attending outdoor events while indoor events are not possible

- 16% of the population would definitely be interested in engaging with outdoor cultural events if they were unable to attend events at indoor venues and 43% would possibly be interested.
- As shown in Figure 23, levels of interest in attending outdoor events were higher amongst women, younger age groups and people with children in their household.
- When asked to give more details on their responses, 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, that they enjoyed being in fresh air and that a live outdoor performance was preferable to an online alternative. However, those who were not interested most commonly mentioned concerns relating to the weather, concerns about being in crowds or unable to social distance or a poorer atmosphere than would be possible at an indoor venue.

Figure 23 – Interest in engaging with cultural events outdoors if unable to go to events in an indoors venue

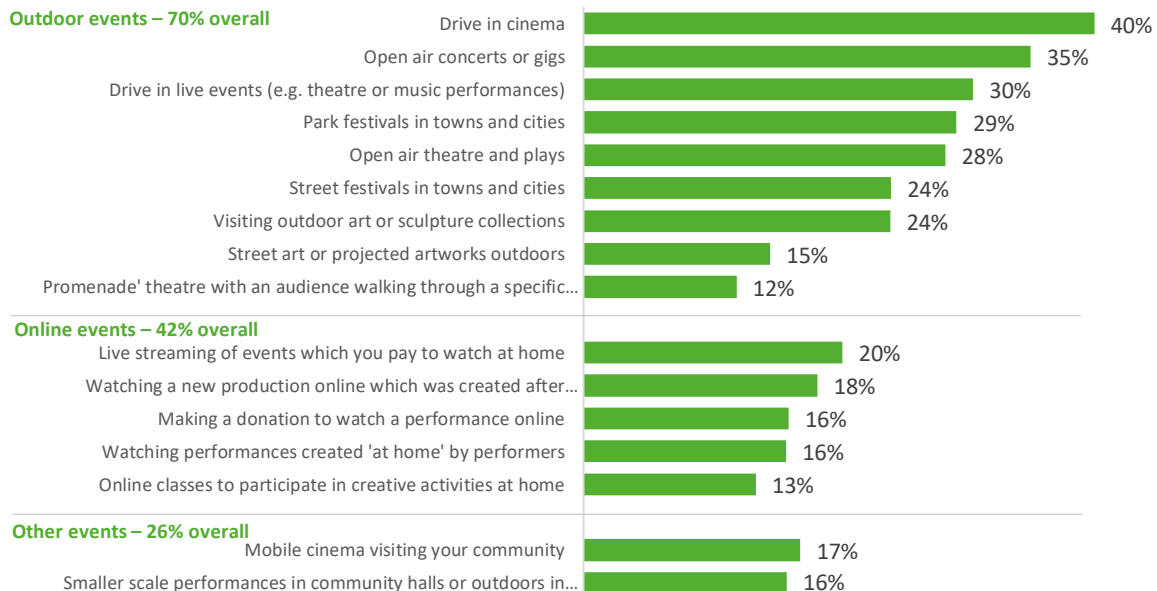


Q15G If you were unable to go to cultural events in an indoors venue for the foreseeable future, would you be interested in engaging with cultural events outdoors?
Base: all respondents = 1,101

Most Scots are interested in attending new types of outdoor arts events, in particular drive in events, open air performances and park festivals

- To further understand which types of event would appeal given the current restrictions, respondents were asked which of the list of types of event shown on Figure 24 were of interest.
- Reflecting the previous findings, respondents were much more likely to select outdoor events than online events (70% vs 42%). Overall over a quarter were interested in drive in cinema and/or live events, open air concerts or theatre and park festivals.
- In general interest in both outdoor and online events were higher amongst women, people aged under 35, people with children at home and residents of urban areas. Specific events with higher appeal to certain demographics included:
 - 46% aged under 35 were interested in open air concerts or gigs.
 - 24% with children at home were interested in mobile cinema visiting their community.
 - 36% with children at home were interested in park festivals in towns and cities.

Figure 24 – Interest in attending new types of places to visit and events to attend

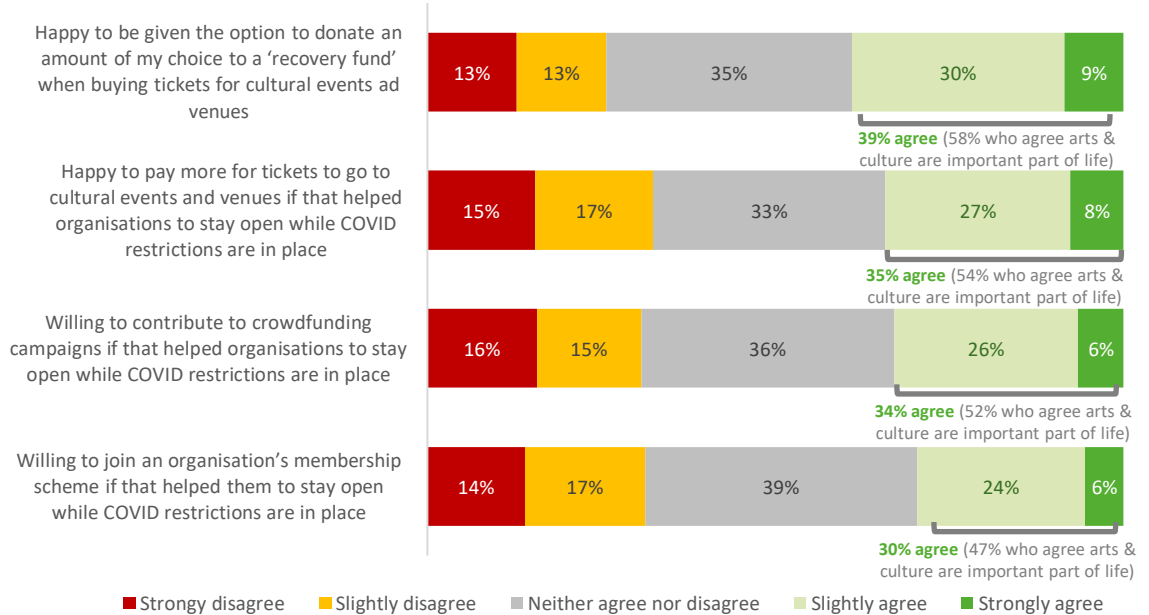


Q17 Given the restrictions places on arts venues and performers at this time, a number of ideas have been proposed for new types of places to visit and events to attend. Which of the following would you be most interested in attending if offered in they were available to you? Base: all respondents = 1,101

Around a third of the population supported making donations or paying more to support events and venues at this time

- Views were obtained on providing support to the arts through charitable donations, paying more for tickets, contributing to crowdfunding campaigns or joining a membership scheme.
- Overall support for making a voluntary donation was highest with 39% agreeing that they would be happy to support in this way while the smallest percentage of the population would be willing to join a membership scheme (30%).
- As shown, agreement for all of these statements was much higher amongst people who stated that arts and culture were an important part of their life. Openness to paying more through each of these potential channels was also higher amongst younger age groups.

Figure 25 – Attitudes to payment and funding of arts events in the future



Q18 Still thinking to the future, please indicate if you personally agree or disagree with the following statements Base: all respondents = 1,101

When a vaccine is generally available attendance levels look likely to return to previous levels or increase amongst some population groups

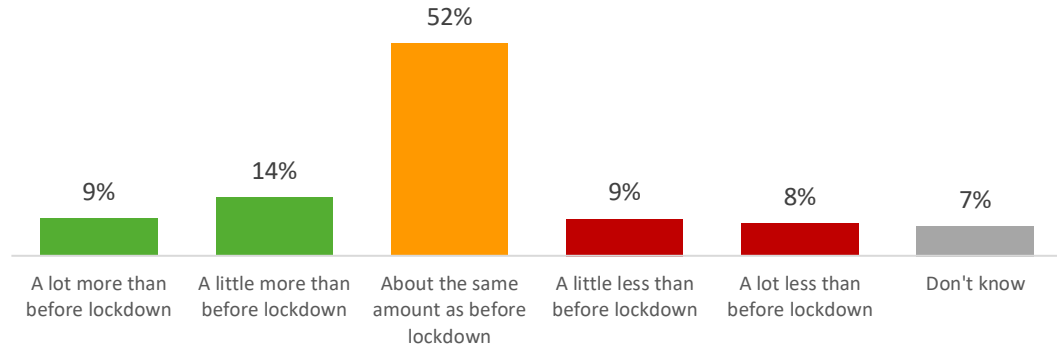
- In the event of a vaccine becoming available or the virus being eradicated, around half of the population would expect to attend the arts at the same levels as before COVID 19, 23% would expect to attend more often, and 17% expect that they would attend less often. These percentages are similar to those recorded in the July survey wave.

- Groups most likely to expect that they would attend more often after the pandemic included people aged 16-34 (33%), members of the BAME population (35%) and people with children at home (34%). Reasons for having this opinion included a desire to 'make up for lost time' or a greater appreciation of the arts following the period of not being able to attend.

- Conversely, groups more likely to state that they were less likely to take part in arts and cultural activities in future included those with a long term illness or disability (24%) and those who stated that their household finances were being impacted by the crisis (21%). Reasons for having this opinion included ongoing fears over safety, old age and concerns over personal finances and affordability of taking part.

Figure 26 – Expected attendance of arts and cultural events and venues in future if the virus is eradicated or a vaccine is found

Imagine a scenario where a vaccine for COVID 19 is found or the virus is eradicated and we can return to the same conditions as before lockdown, with no more need for physical distancing or other precautions. Compared to before lockdown how often would you expect to go out to visit and attend arts and cultural events and venues?



C19 Compared to before lockdown how often would you expect to go out to visit and attend arts and cultural events and venues? Base: all respondents = 1,101



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