



Covid 19: Public intentions on returning as audience members

Wave 3 report
(Fieldwork from 7th to 17th May 2021)

Creative Scotland
9th June 2021



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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 prior to the Covid-19 pandemic. 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 the clear societal benefits obtained through arts, the creative sector is massively important to the Scottish economy. According to the Scottish Government's latest pre-pandemic figures the creative sector employed more than 70,000 people and was 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 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 protective measures such as social distancing likely to be in place for sometime into the future.

This research was 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 events and their concerns and aspirations for the future as we move out of lockdown.

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 May 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

- Waves of research have been undertaken during July 2020, November 2020 and May 2021 to measure and track the Scottish adult population's behaviours and attitudes toward arts attendance. This report provides results from the third wave of this study.
- An online approach has been used with fieldwork for the third wave undertaken between the 7th and 17th May 2021. The previous two waves took place from 27th July to 2nd August 2020 and 6th to 23rd November 2020.
- 1,071 interviews were conducted in the third 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 97 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	473
Female	593
Age	
16-34	279
35-54	375
55+	417
Socio-economic group	
ABC1	584
C2DE	487
Ethnicity	
White	974
BAME	97



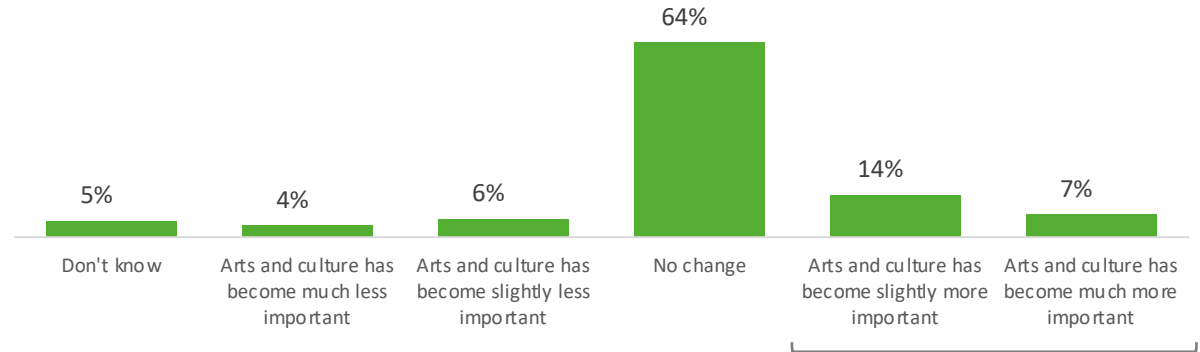
Cultural engagement during the pandemic



Arts and cultural activities have increased in importance for many people during the Covid-19 pandemic

- Reflecting on the period since the initial lockdown began in late March, it is notable that just over a fifth of the adult population in Scotland have noticed that arts and culture have become more important to them over this period (21%). 64% feel that the importance of the arts and cultural has not changed while they have become less important for 10% of the population.
- Groups most likely to state that arts and culture have become more important include members of the BAME population, people aged 25 to 34 and people who also state that their household finances have been negatively impacted by Covid 19.
- When ask why this was the case, a wide range of responses were provided including references to the wellbeing and mental health benefits of arts and culture and that periods of lockdown had provided more time to engage with creative activities. A selection of the responses provided are on the next page.

Figure 1 – Changing importance of arts and cultural activities because of the Covid-19 pandemic



Become more important for 21% overall

Higher amongst:

Members of BAME population (37%)

People aged 25-34 (32%)

Those who household finances have been negatively impacted by Covid 19 (32%)

NEW7 To what extent, if any, has the importance of the arts and cultural activities you do or watch and the venues and events you go to changed for you because of the Covid-19 pandemic? Base: All respondents =1,071

Arts and cultural activities have provided an escape for many while others have missed being able to attend and visit venues and events

Why arts and cultural activities have become more important because of the Covid-19 pandemic...

"It was taken away in lockdown and it made me realise how it affects your mental health. It is incredibly important for personal growth, happiness, health and happiness. Life without the arts is sad. Online options were great to have but the real live experience is irreplaceable."

"I have always been keen on arts/cultural events; the pandemic has reminded me of how important the creative arts are for society as a whole; I have really missed attending live theatre and visiting art galleries and museums."

"I've had time to reflect on what is important in life to me. The arts have been a huge part of my life for as long as I can remember, and due to the restrictions I have had to more creative in the way that I explore it."

"It helps us process and relax from the world around us, it takes us out of ourselves and helps us meet and connect with other people - all which have been severely hampered by Covid and have left people feeling adrift and lonely or boxed in."

"The pandemic has produced many fine examples of artists trying new things online and the creativity that has been shown has been both inspiring and engaging and it would be a shame if these elements were lost."

"Arts and culture have been a valued escape from lockdown, even when I have watched live theatre performances at home."

"I have noticed I missed life getting out there meeting new people going doing different things and this included gigs, parks history sites."

"I've discovered new streamed arts entertainment (music) of which I was previously unaware."

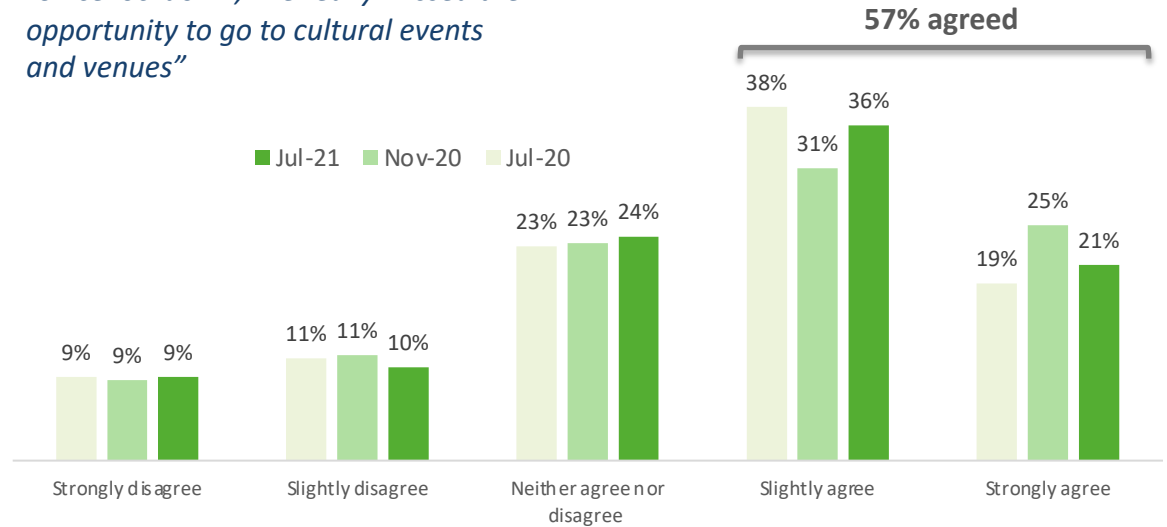
"We have to retain our culture and part of one's culture and identity I believe is in the arts and that that one chooses to embrace and retell."

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 2020, 57% of the population either slightly or strongly agreed that they have missed the opportunity to go to cultural events and venues.
- This percentage is consistent with that recorded in the July and November 2020 survey waves.
- The percentage who strongly agreed with this statement was higher amongst certain demographic groups including those in the more affluent ABC1 socio-economic groups (41% vs 31% of C2DEs), women (23% vs 19% of men) and people aged under 35 (25% vs 17% aged 65+).

Figure 2 – Level of agreement with statement

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

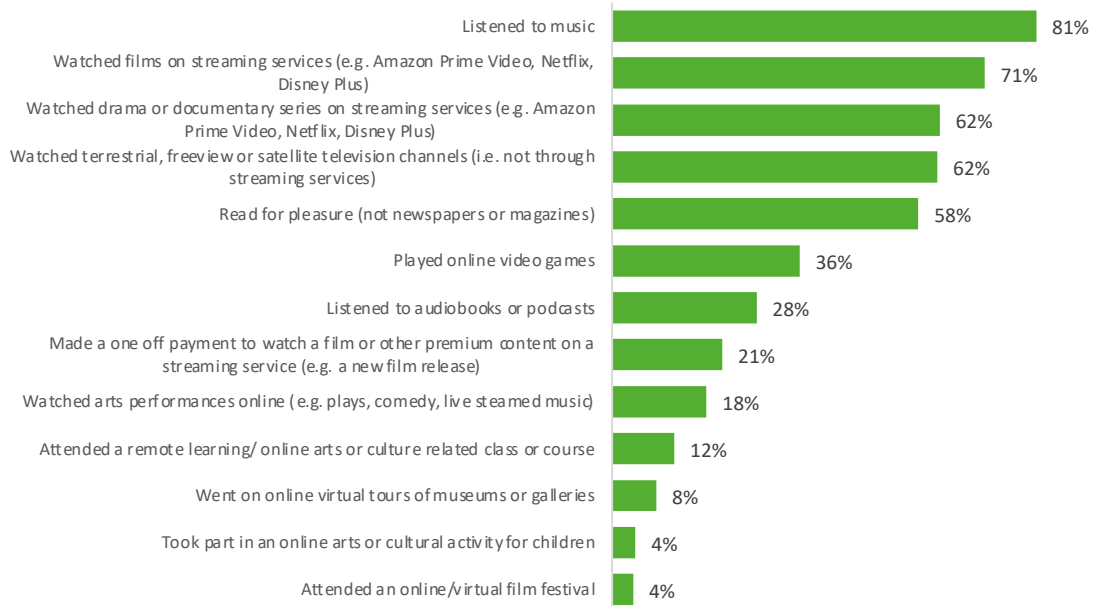


9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,071

During the pandemic most of the population have listened to music, watched films, drama or documentaries or read for pleasure

- Respondents were asked if they had undertaken any of the activities shown in Figure 3 while at home in the period since the first lockdown began on 23rd March 2020.
- The most commonly undertaken activities were listening to music (81%) and watching films on streaming services while over half had watched dramas or documentaries (62%), watched television (62%) and/or read for pleasure (58%).
- Participation varied by age with those aged under 35 more likely to watch streaming services, play online games, listen to audiobooks & podcasts or attend online learning while people aged 65+ were more likely than younger age groups to have read for pleasure.
- Also members of the BAME population were more likely to listen to audio books or podcasts (41%), to attend remote learning (39%) or to watch arts performances online (29%).

Figure 3 – Activities undertaken at home during pandemic

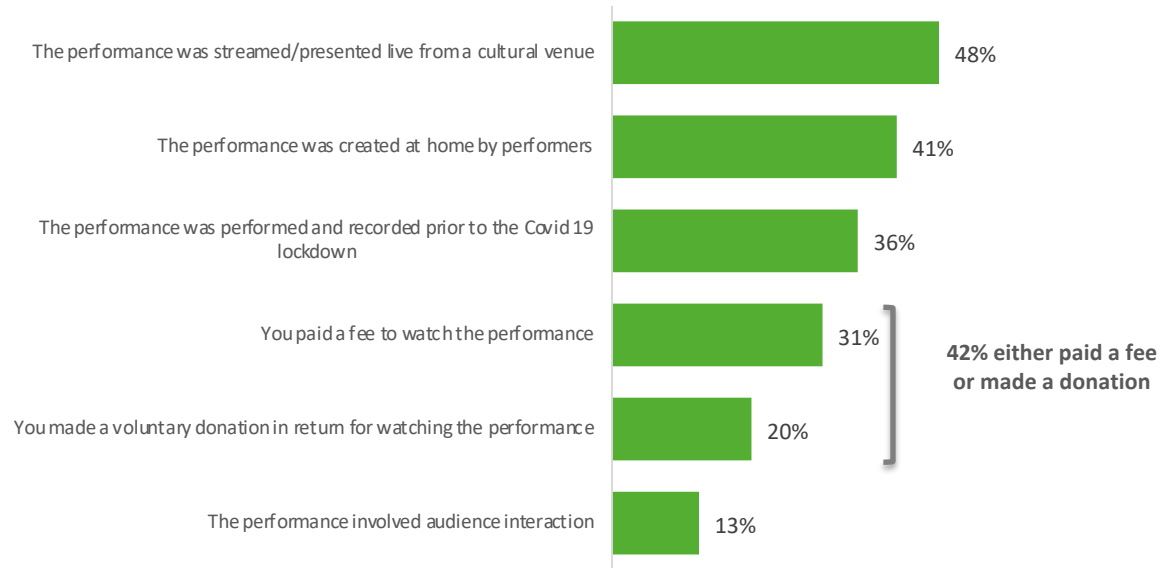


7) During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,071

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

- The 18% of the population who watched online performances at home since 23rd March 2020 were asked to provide further details.
- Around half indicated that the performance was streamed or presented live from a cultural venue (48%) while 41% stated it was created at home by the performers.
- Overall 41% either paid or made a donation to watch the performance.

Figure 4 – Nature of online arts performances watched during pandemic

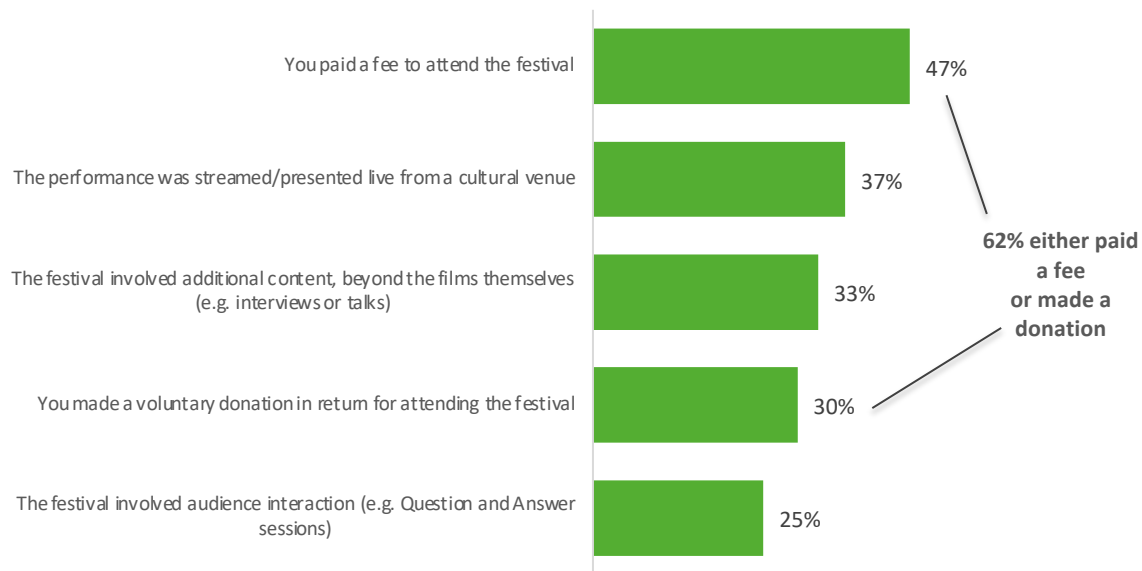


7) Which of the following statements, if any, were applicable to any of the performances you watched online during this period. Base, respondents that watched performances online = 196

Three in five of those attending an online film festival paid a fee or donation

- The 4% of the population who had attended an online/virtual film festival at home since 23rd March 2020 were asked to provide further details.
- Just over half (62%) had either paid a fee or made a donation to attend the festival.

Figure 5 – Nature of online/virtual film festival(s) attended during pandemic



NEW 1) Which of the following statements, if any, were applicable to the elements of the festival you watched online during this period. Base, respondents that attended online film festival = 46

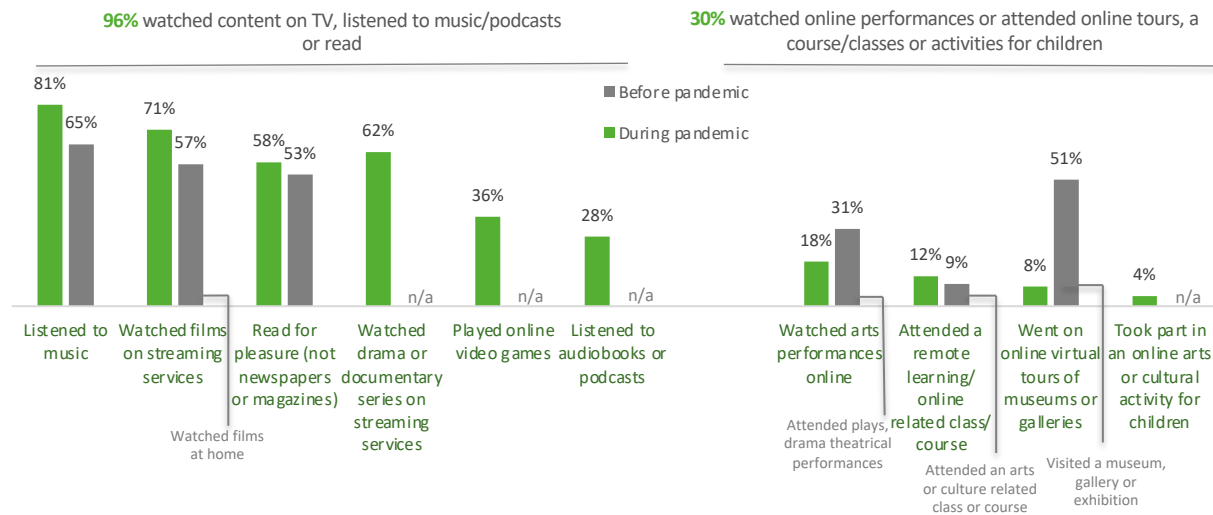
Just under a third of the population engaged with content at home which might substitute a physical attendance at a venue or event

Figure 6 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 over the pandemic period the vast majority of the population had taken part in the first set of activities, viewing or listening to existing content (96%). Where data is available from the arts participation research undertaken before the pandemic, we see increases in the percentages of the population participating in all of these activities.

However a smaller percentage (30%) had participated in the 'substitute' activities and levels of participation in all of these activities were generally lower than the equivalent activities recorded in surveys conducted in 2019.

Figure 6 – Activities undertaken at home during lockdown - comparison to 2019 survey results (pre lockdown definitions included where different. Listening to music, watching films and reading from 2019 Creative Scotland population survey)



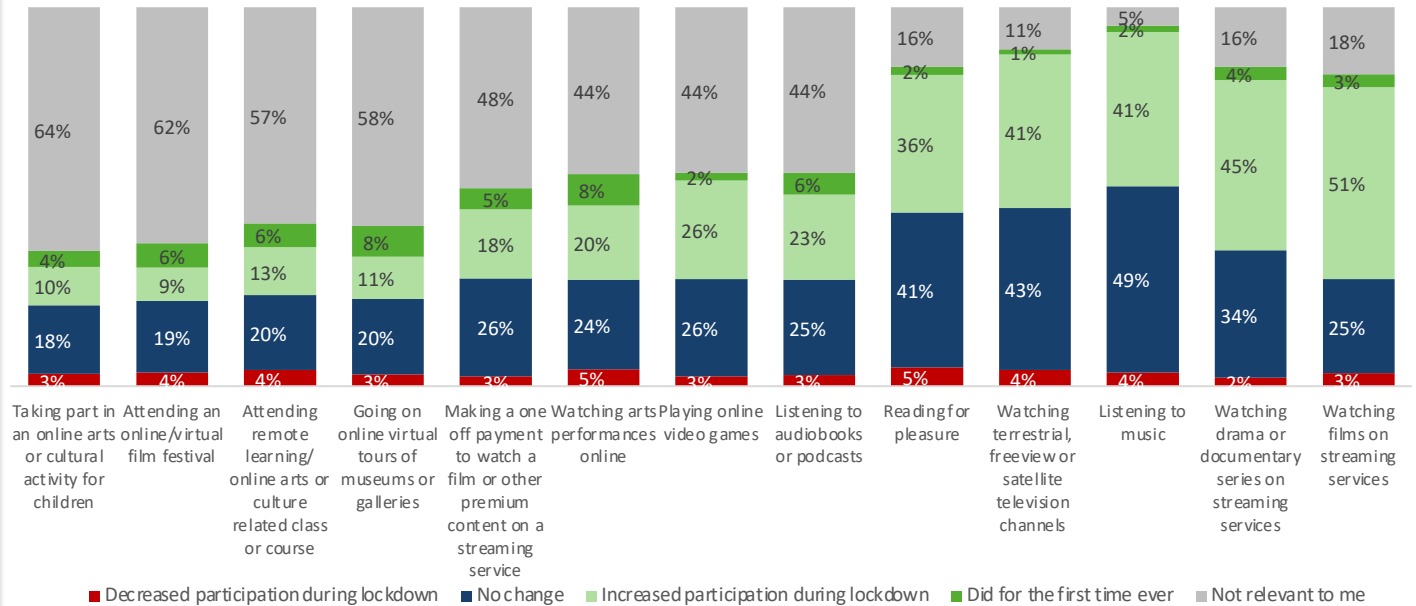
7) During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,071

Most of the population increased their participation in at home cultural activities compared to the year before the first lockdown

As shown in Figure 7, survey respondents were asked to indicate whether they felt that their own participation in at home cultural activities during the period since the first lockdown began had increased, decreased or not changed in comparison to pre-pandemic levels. 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 watching films, drama or documentaries on streaming services, listening to music watching terrestrial, Freeview or satellite television or reading for pleasure.

Figure 7 – Respondent's views on how participation levels have changed during the pandemic



8) Compared to the before the initial lockdown on 23rd March 2020, how much, if at all, has the amount that you do these cultural activities at home changed during the last year or so (i.e. from the start of the first lockdown to now)? Base, all respondents = 1,071

Participation increased most for watching streaming services, gaming and listening to audiobooks and podcasts

Figure 8 – How participation levels have changed during pandemic- net change excluding those stating activities were 'not relevant'

			NET CHANGE
Watching films on streaming services	-4%	66%	+61
Watching drama or documentary series on streaming services	-3%	57%	+55
Playing online video games	-5%	50%	+45
Listening to audiobooks or podcasts	-5%	50%	+45
Watching terrestrial, freeview or satellite television channels	-5%	47%	+42
Watching arts performances online	-8%	50%	+41
Listening to music	-4%	45%	+41
Making a one off payment to watch a film or other premium content on a streaming service	-5%	46%	+40
Reading for pleasure	-6%	46%	+40
Going on online virtual tours of museums or galleries	-7%	46%	+38
Attending remote learning/ online arts or culture related class or course	-10%	44%	+34
Taking part in an online arts or cultural activity for children	-9%	40%	+31
Attending an online/virtual film festival	-9%	40%	+31

Figure 8 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.

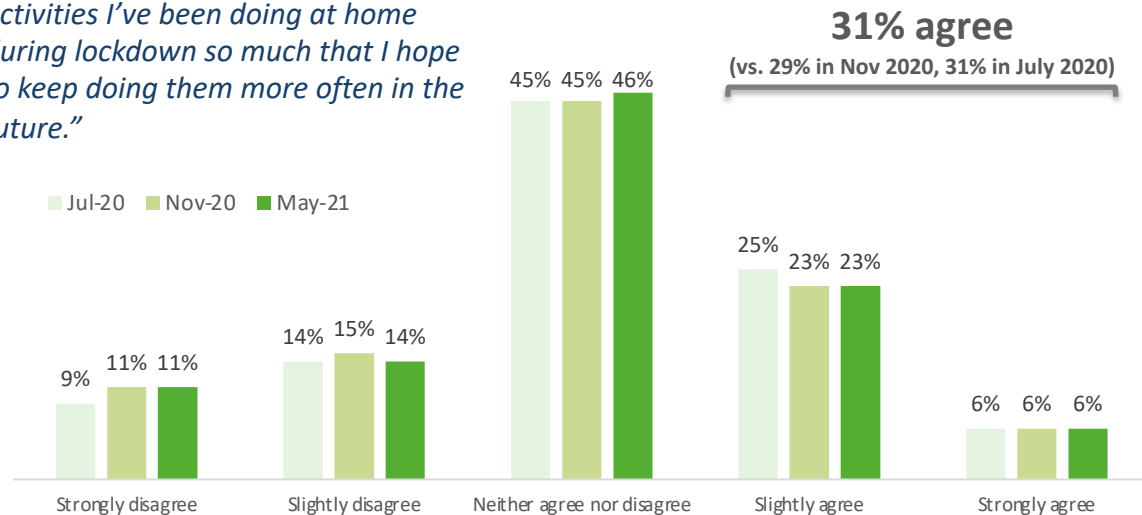
This comparison further illustrates the scale of increased participation in every activity during the pandemic, particularly watching streamed television, playing video games and listening to audio books, podcasts and music.

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

- Although many people have experienced 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 9, in May 2021 31% 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. This level is similar to that recorded in the 2020 survey waves.
- However people aged 16-34 and people with children at home were more likely to agree with this statement (43% and 38% respectively).

Figure 9 – 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.”



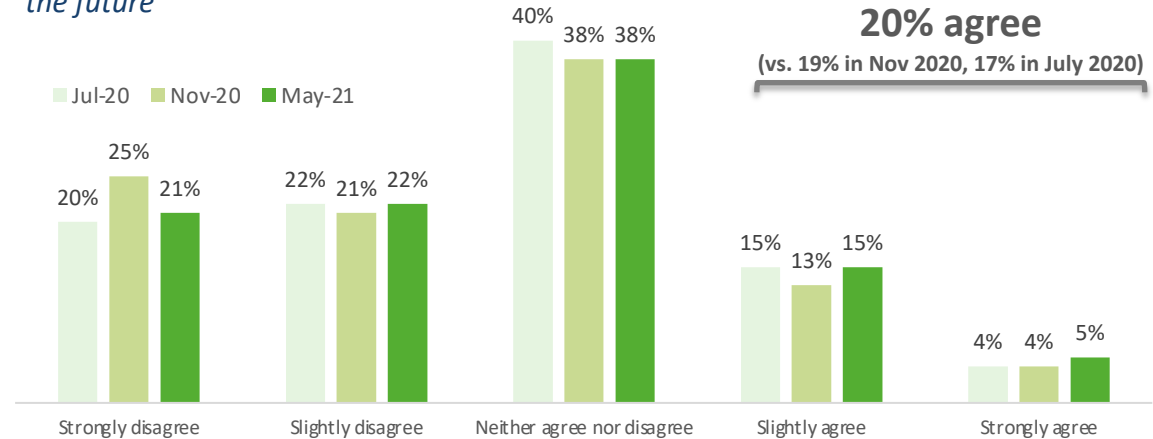
9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,071

A fifth would be open to paying for the online cultural content they have seen during the pandemic in the future

- As shown in Figure 10, during the May 2021 survey wave 20% of the population agreed that they would pay to access cultural activity online in the future while 43% disagreed with this statement (21% strongly).
- With similar levels of agreement and disagreement during the 2020 survey waves, these results suggest that at the population level there is a limited appetite for paid for online content.
- However levels of agreement were higher amongst those aged 16-34 (31%) and people with children at home (33%).

Figure 10 – 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”

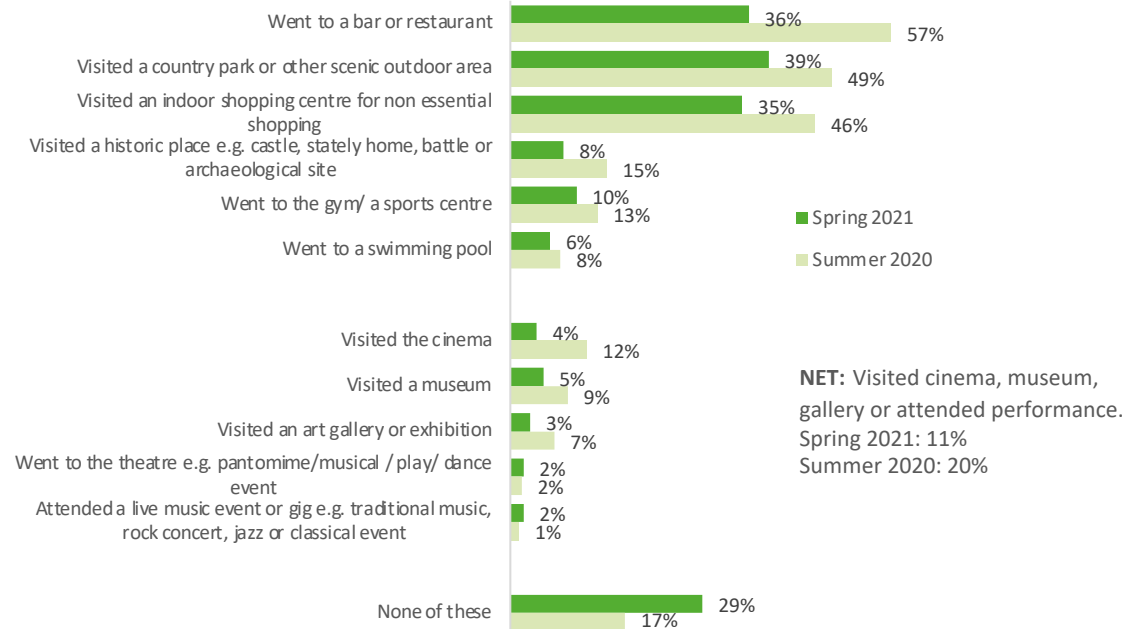


9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,071

A tenth of the population took part in an 'out of home' cultural activity between the initial easing of lockdown rules in April and survey fieldwork in first half of May

- In May 2021 11% of the population had undertaken one or more of the activities listed in Figure 11 in Scotland in the first few weeks since the initial easing of lockdown rules in April (in most of Scotland libraries, museums and galleries re-opened on 26th April).
- 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 11% had undertaken 1 or more of the cultural activities included in the question.
- All of the levels recorded were lower than when the same question was asked in 2020 regarding participation during the preceding summer months.

Figure 11 – Activities done in Scotland since the easing of lockdown rules in the – summer 2020 vs spring 2021



10b) Which of the following activities, if any, have you done in Scotland since the most recent easing of lockdown rules this spring (i.e. during March, April and the first half of May 2021)? Base, all respondents = 1,071

Experiences of cultural activities attended have been varied

Figure 12 – Satisfaction with cultural activities undertaken since re-opening – summer 2020 and spring 2021

		Very good	Quite good	Neither good nor poor	Quite poor	Very poor	Base
Visiting the cinema	Spring 2021	46%	39%	7%	6%	2%	129
	Summer 2020	22%	47%	18%	10%	3%	45
Attending a live music event	Spring 2021	39%	52%	-	9%	-	16
	Summer 2020	31%	20%	28%	15%	6%	23
Going to a theatre	Spring 2021	16%	32%	33%	16%	2%	21
	Summer 2020	34%	48%	12%	-	6%	21
Visiting a museum	Spring 2021	29%	53%	11%	4%	3%	90
	Summer 2020	33%	51%	7%	9%	-	55
Visiting and art gallery or exhibition	Spring 2021	39%	47%	11%	2%	2%	75
	Summer 2020	40%	37%	10%	11%	2%	38

12b) How would you rate the quality of your experience? Based on respondents who had taken part since rules eased

As shown in Figure 12 when those people who had attended the cultural activities were asked to rate their experiences (note small sample sizes), responses were varied but less than half providing the top rating of ‘very good’ for any of the activities. Some of the responses provided are shown below.

“Scottish National Gallery, very happy with visitor arrangements.”

“Well managed and interesting but slightly less enjoyable due to having to wear a face covering.”

“A simple return to enjoying exhibits on view.”

“I did not feel safe so would not return again.”

“..the experience was good although social distancing could have been better”

“The show was extremely good but the covid restrictions were in where you had to sit 2 metres apart which was very good as the theatre staff consistently made sure everyone was adhering to the rules and regulations. It was a comedy show and it was absolutely fabulous.”

Desires and plans to attend as restrictions are eased



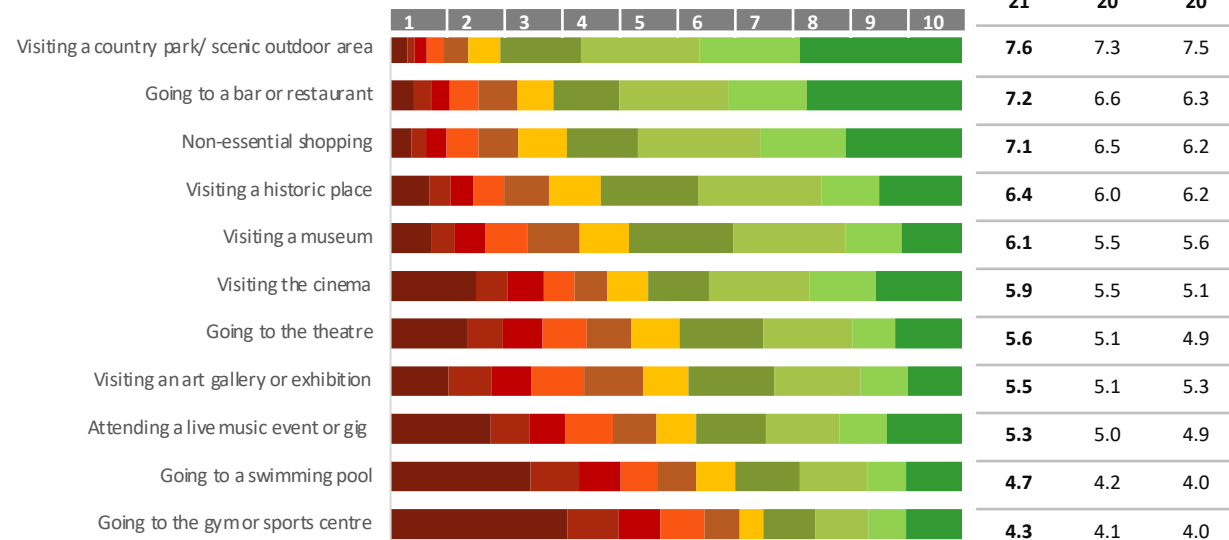
While levels of desire to attend arts and cultural venues remain varied they are higher than recorded in either of the 2020 survey waves

- 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 May 2021 were in a similar order to those recorded in the 2020 survey waves with willingness to visit country parks and other outdoor areas highest, followed by going to a bar or restaurant and non-essential shopping.
- Focusing on the cultural activities listed, desire to visit a museum was highest while desire to attend a live music event or gig was lowest.
- However since November 2020 desire to take part in all of the cultural activities included increased.

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

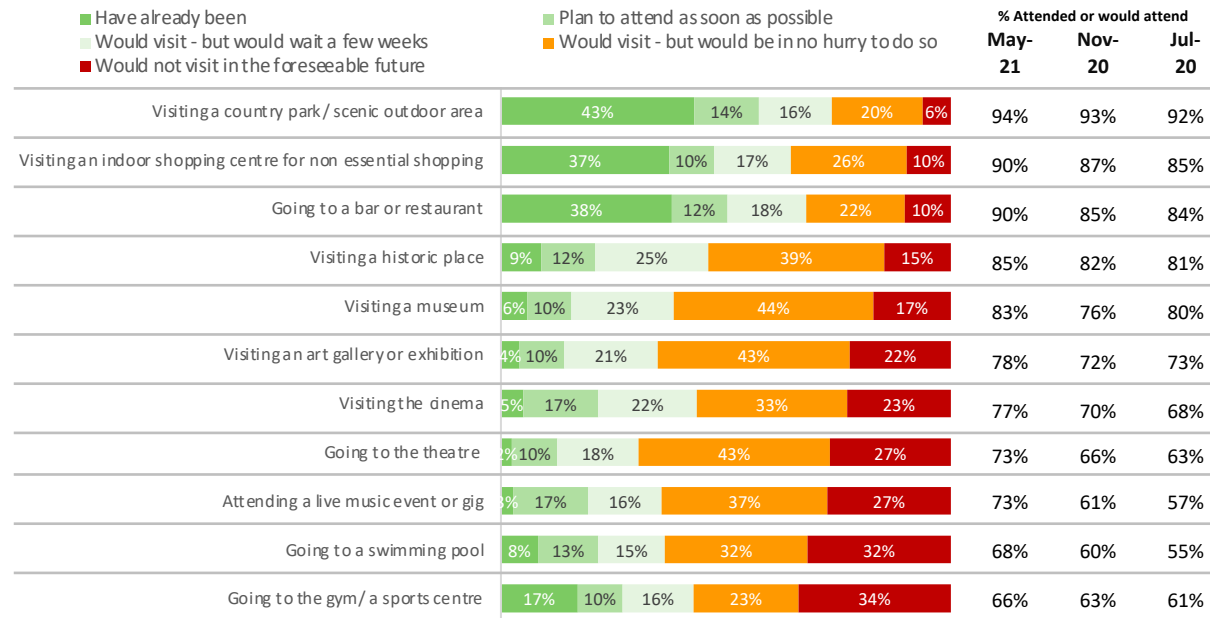


Base, all respondents = 1,073

While many people feel that they will take their time or are reluctant to return to arts venues, intention to attend has increased since November

- Asked when they would take part in 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 quarter stated that they would not visit a theatre or live music event in the foreseeable future (both 27%).
- However, comparing the percentages who would attend in future (including 'in no hurry') in the May 2021 survey wave with the 2020 survey waves suggests that levels of demand have increased for all of the arts and cultural activities, most notably attending live music events or gigs (increased from 61% to 73%).

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

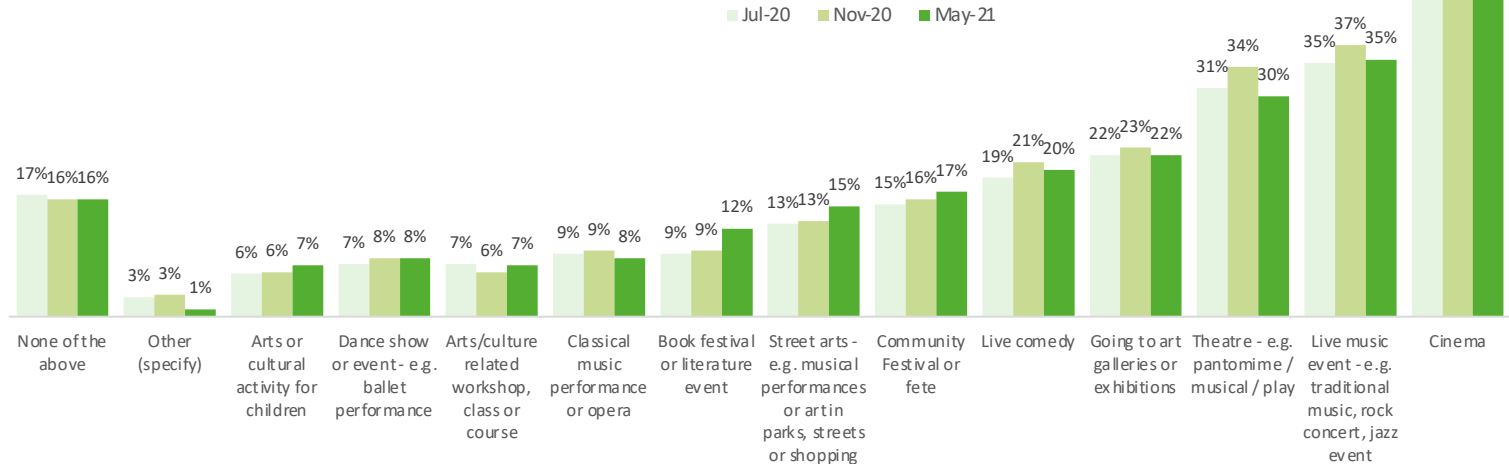


Q11 Which, if any, of the following best describes when, if at all, you would feel happy to go to each of these places once lockdown rules allow (excludes Don't Know and Not applicable responses for each activity). Base: all respondents = 1,101

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

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

- Respondents were asked to specify the arts activities they most look forward to attending again in the future.
- At the overall population level the results in all of the survey waves were fairly consistent. Around half of the population (48%) most looked forward to attending the cinema while just over a third most looked forward to returning to live music (35%).



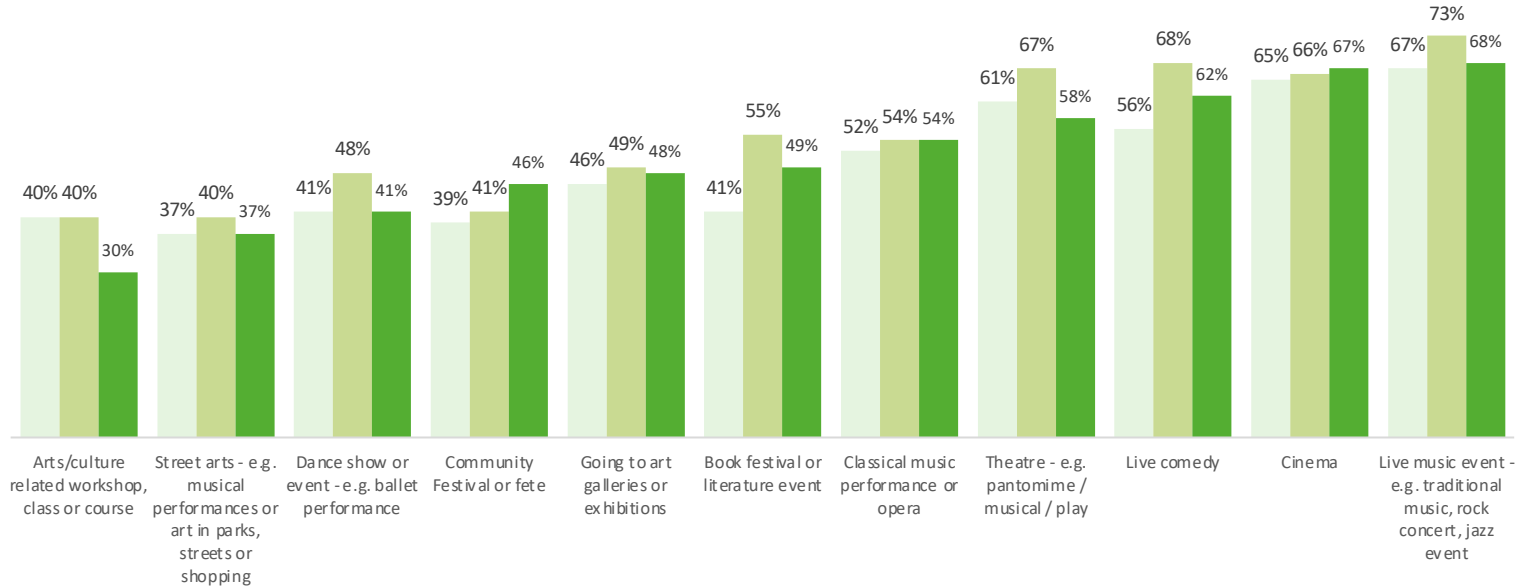
Q12 Thinking in more detail about specific arts and cultural activities, which of the following, if any, do you most look forward to attending in the future when it is possible?. Base: all respondents = 1,071

Those who attended events in the year before the pandemic are particularly likely to want to return to live music, cinema and comedy

Figure 16 – Arts and cultural activities most look forward to attending in future - THOSE WHO ATTENDED EACH ACTIVITY BEFORE COVID-19

As would be expected people who attended each of the activities asked about during the 12 months before the initial March 2020 lockdown were much more likely to look forward to attending again in the future.

In May 2021 the highest levels of interest amongst previous attendees were recorded in relation to attending live music (68%), cinema (67%), live comedy (62%) and theatre (58%).



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?.

While levels of demand for most types of arts event remain suppressed compared to pre-pandemic, they have increased somewhat since 2020

- 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 17 summarises the results excluding those who would not have considered an activity and illustrating the net change recorded in the May 2021 and November and July 2020 survey waves (% more likely minus % less likely).
- While demand for a number of the activities asked about remains lower than before COVID 19 (most notably dance and classical music events), the outlook is most positive for cinema, street arts and visiting historic places.
- Comparing the net results with those obtained in the 2020 survey waves suggest that the picture has become less negative for every activity.

Figure 17 – How preferences have changed as a result of COVID 19 outbreak

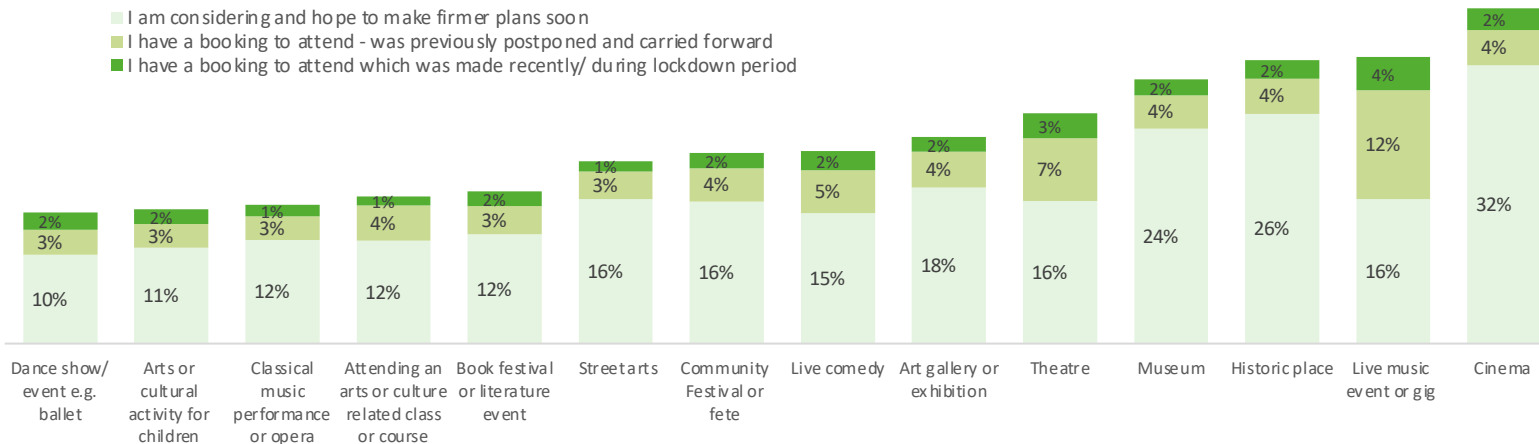
	Less likely to consider	More likely to consider	May-21	NET CHANGE Nov-20	Jul-20
Historic place	-14%	21%	+6	-5	-5
Street arts	-18%	18%	-	-11	-12
Cinema	-24%	24%	-	-18	-24
Community Festival or fete	-18%	17%	-2	-19	-20
Live comedy	-22%	20%	-3	-16	-19
Museum	-19%	16%	-3	-11	-13
Live music event	-24%	20%	-5	-18	-26
Art gallery or exhibition	-20%	14%	-6	-14	-17
Attending an arts or culture related class or course	-23%	17%	-6	-25	-26
Book festival or literature event	-20%	13%	-7	-19	-20
Theatre e.g. pantomime/musical / play	-24%	16%	-8	-20	-23
Arts or cultural activity for children	-24%	15%	-9	-17	-18
Dance show/ event e.g. ballet performance	-24%	14%	-10	-24	-24
Classical music performance or opera	-24%	13%	-11	-24	-23

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 = 1,071

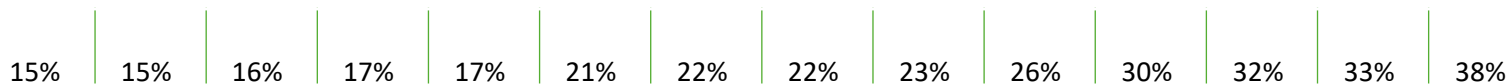
Almost two fifths of the population are booked or planning to attend the cinema while a third are planning to attend live music

- Respondents were asked whether they had any bookings to attend arts and cultural activities or if they were considering attending.
- Combining those booked and considering, the largest proportions of the population were expecting to attend the cinema in future (38%).
- Live music was the activity which people were most likely to have a booking for (16% overall) – most often for a rescheduled event.
- Overall, 62% of the population had bookings or were considering attending one or more arts and cultural events in the future.

Figure 18 – Booking and plans to attend arts and cultural activities in future – TOTAL POPULATION



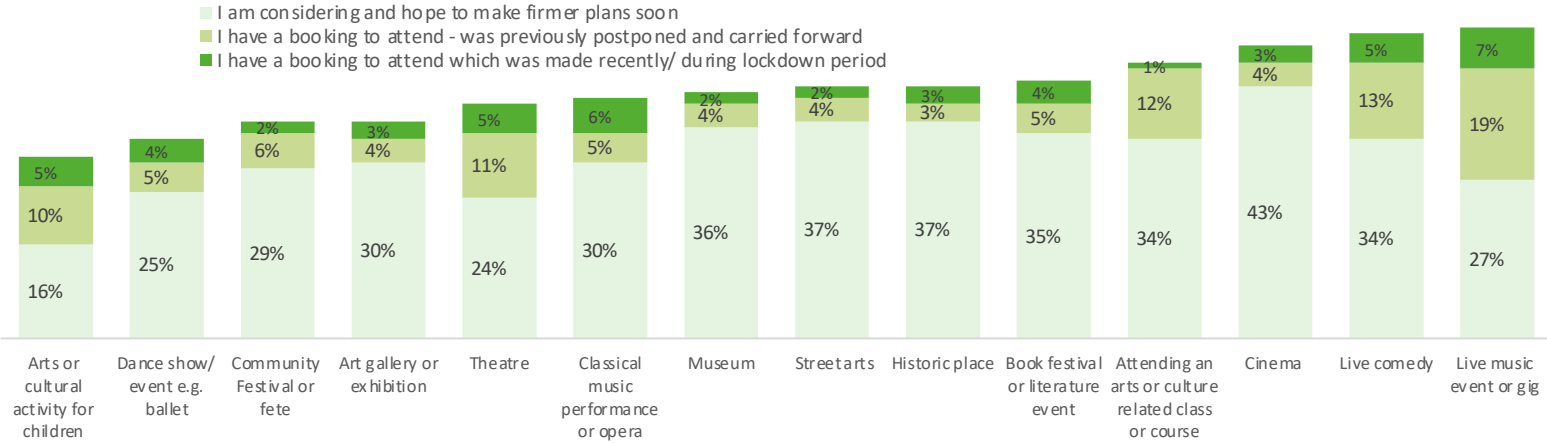
Total booked or considering:



NEW2) Do you have any bookings or plans to attend any of the types of arts and cultural activities you stated that you would consider doing in future? For each activity select the answer option which applies to you

Half of those who attended live music, live comedy or cinema plan to attend in the future, many already have tickets booked

Figure 19 – Booking and plans to attend arts and cultural activities in future – THOSE WHO ATTENDED EACH ACTIVITY BEFORE COVID-19



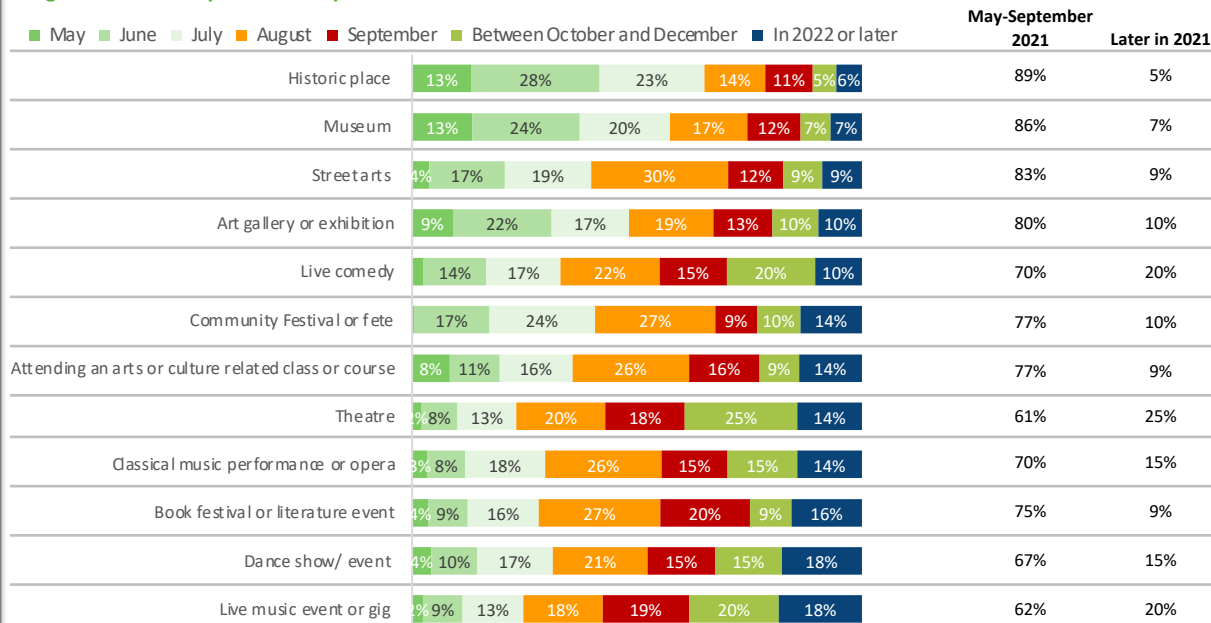
Total booked or considering:



NEW2) Do you have any bookings or plans to attend any of the types of arts and cultural activities you stated that you would consider doing in future? For each activity select the answer option which applies to you

While most who plan to visit a historic place, museum or gallery expect to go in the next two months, those attending live performances are more likely to hope to do so later in summer or autumn

Figure 20 – When plan to take part in cultural and other leisure activities



NEW3) When do you expect to attend this art of cultural activity? (if you plan to attend on more than one occasions select the first occasion you expect to attend) Base: Those who have booked or are considering attending in future, excluding Don't Know responses.

Much of the population would like more information to help them to make plans for attending arts and cultural activities later in 2021

Figure 21 – How informed population feels regarding attending arts and cultural activities later in 2021



Just over a third of the population (36%) stated that they currently felt either quite or very well informed about arts and cultural activities they could attend now or later in 2021. When asked if there were any particular areas where more information would help them to make firmer plans, the most common responses related to firmer information on opening dates, information to reassure them on protective measures and practical information such as how to make reservations. A selection of responses is provided below.

When theatres will open and what shows will open as well as what the conditions will have to be when we go see musicals/ plays, such as if we have to be vaccinated, have a negative test etc

Are reservations required in order to visit a location?

I would like the Scottish Government to give more accurate dates for when things will be allowed to go ahead. I don't want to book anything for later in the year when the roadmap out of lockdown doesn't cover those dates.

If social distancing in cinemas and theatres were guaranteed. Also limited number of people allowed into museums, historical buildings etc.

Definite dates for opening up and numbers that can attend

If time slots were available to book in advance so that visitor numbers could more easily be controlled.

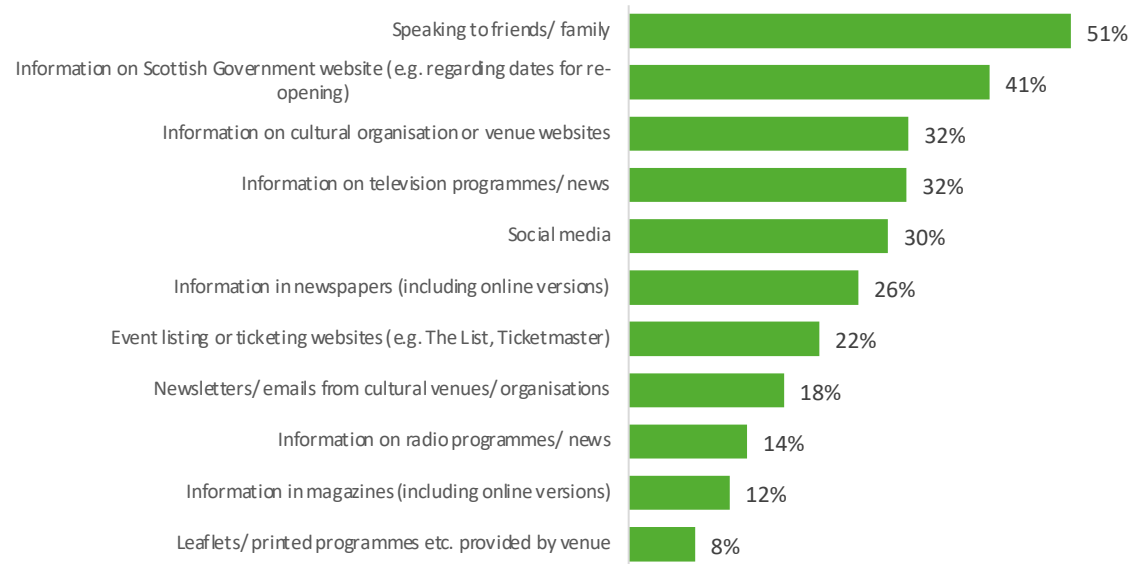
What sort of preventive measures they are going to take up

NEW 5) How well informed do you currently feel about the arts and cultural activities which you can attend now or will be able to attend later this year (for example what will be allowed/available and when)? . Base, all respondents = 1,071

A range of formal and informal information sources are used when planning to attend arts and cultural activities

- Those respondents who had booked or were considering booking to attend events were asked to indicate the sources of information they had used when they were making plans.
- As shown in Figure 22, the most common sources of information were speaking to friends and family (51%) and information on the Scottish Government website regarding dates for re-opening (41%). Around a third had used cultural organisation or venue websites (32%).
- Sources used varied by age with people aged 16-34 more likely than older age groups to speak to friends and family (63%), look at social media (47%) or use event listing or ticketing websites (28%) while people aged 55 or over were more likely to obtain information from television programmes/news (42%).

Figure 22 – Sources of information used when planning to attend arts and cultural activities in future



NEW4) Which of the following sources of information have you used when you have been planning to attend arts and cultural activities when the easing of restrictions makes this possible? Base, those considering or book to attend any arts or cultural activities= 663

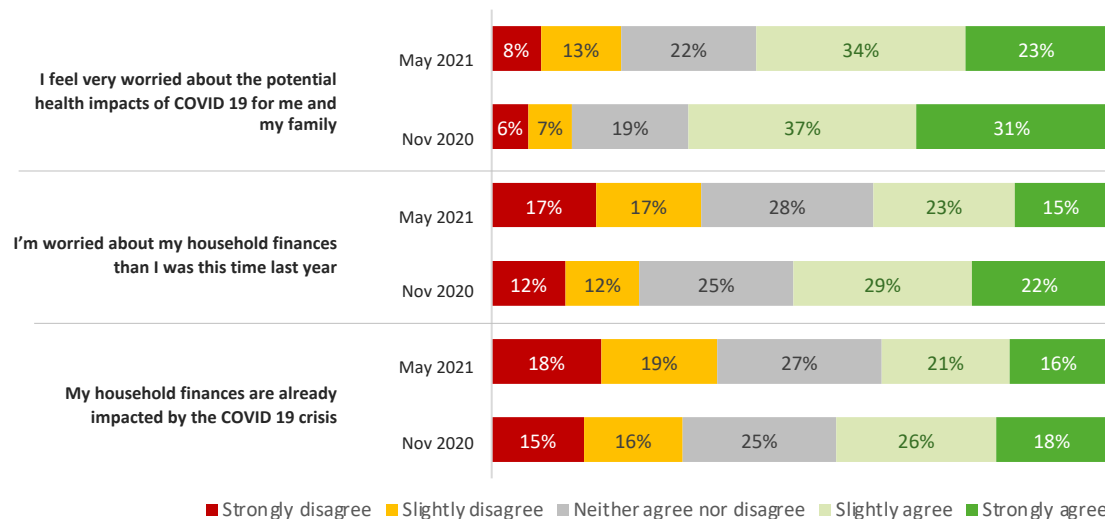
Understanding changing attitudes to attendance



While much of the population remains worried about the impacts of Covid-19 on health and finances, concerns have reduced since November

- 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.
- 57% of the population agreed strongly or slightly that they are feeling very worried about the potential health impacts but this percentage had decreased from 68% in November 2020. In May 2021 this concern was greater amongst older people ranging from 52% of those aged under 45 to 60% aged 65+.
- In May 2021 38% agreed that they were more worried about personal finances than a year ago and 37% stated that their finances were already being impacted. These percentages are also lower than those recorded in November 2021 (51% and 44% respectively) suggesting reduced levels of concern overall.
- In both periods financial concerns were highest amongst women, younger age groups, families and members of the C2DE socio-economic groups.

Figure 23 – Feelings regarding the impacts of Covid-19



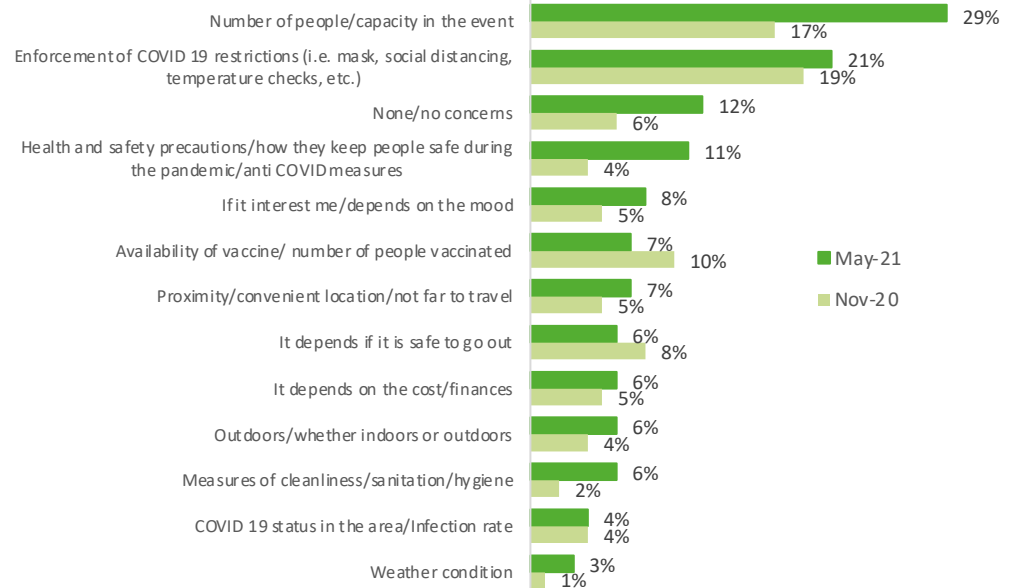
Q18 Please indicate if you personally agree or disagree with the following statements.. Base: all respondents = 1,071

Enforcement of controls on numbers of people and Covid 19 restrictions at venues are important to many when deciding whether to attend

- 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 (an open ended question asked with responses then categorised into the groups shown in Figure 24).
- In May 2021 the most frequently provided responses related to controls on the numbers of people/ capacity at events and venues (29%) and in general having confidence that venues were enforcing the required restrictions (21%).
- However it is also notable that 12% of respondents stated that nothing would influence them or that they had no concerns while 8% indicated that they would only be influenced by whether or not the event interested them.
- In comparison to the responses obtained when the same question was asked in November 2020, the percentage of people mentioning concerns over the number of people attending and health and safety precautions increased.

Figure 24 – 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.

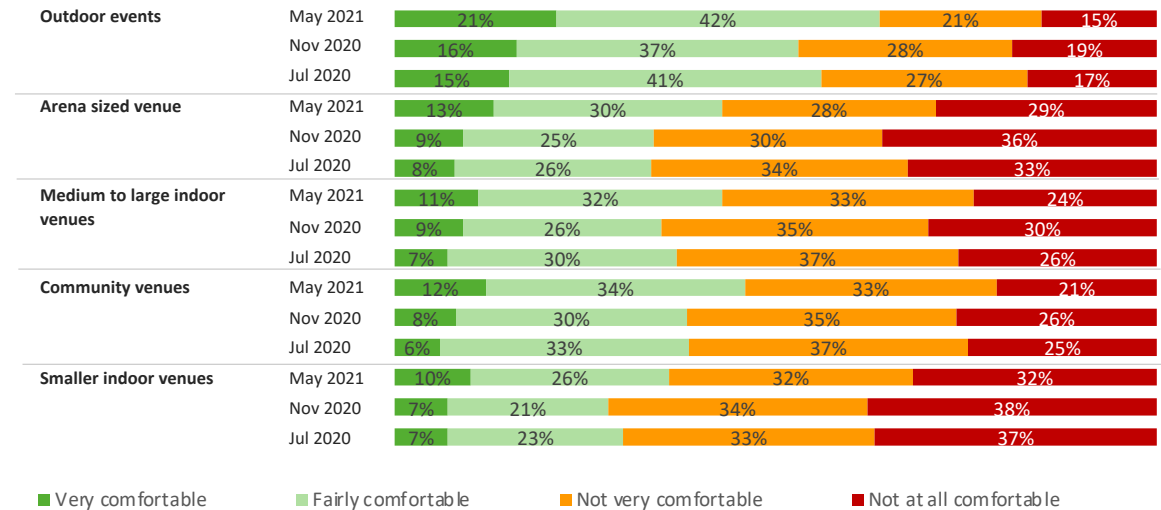


Base: all respondents = 1,073

Increasing percentages of the population feel comfortable attending venues to watch future performances, especially those which are outdoors or larger

- 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 to previous waves, during May 2021, the largest percentage felt either very or fairly comfortable attending outdoor events (63%) while the smallest percentage felt comfortable in smaller indoor venues (36%). People aged under 45 continue to be much more likely to feel comfortable in any of the types of venue.
- Notably, the proportions who stated that they would feel comfortable with any of the venue types was higher in May 2021 than in either of the 2020 survey waves.

Figure 25 – Level of comfort going to different types of venue to watch performances in future

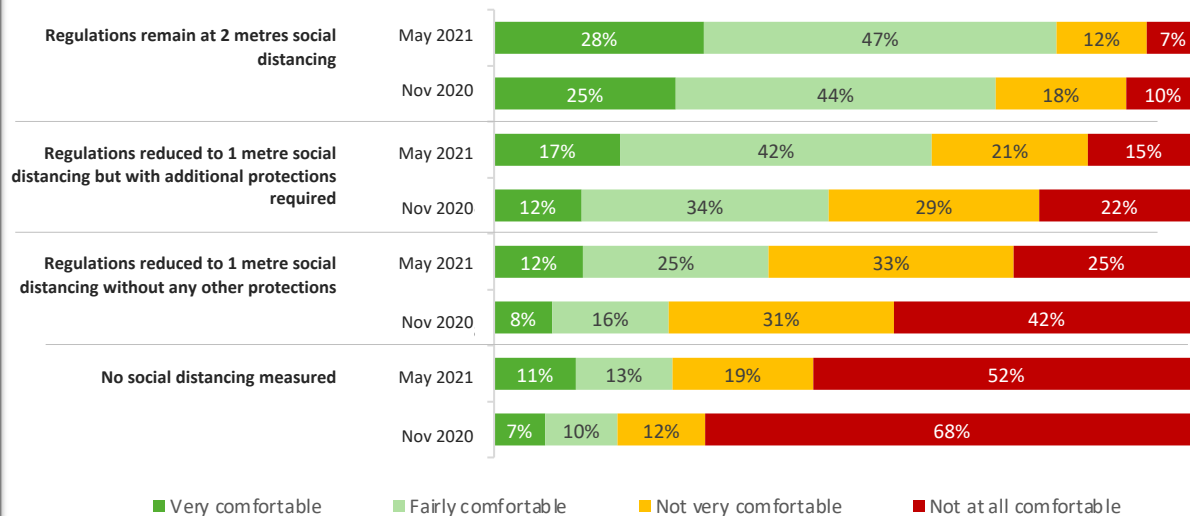


Q15 Thinking more specifically about the types of place that arts and cultural activities could take place in, how do you feel about going to the following types of place to watch performances in the near future? Base: all respondents = 1,071

Most of the population would accept a reduction to 1 metre social distancing restrictions in venues with additional protections in place

- 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 26.
- In May 2021, 59% of the population were very or fairly comfortable with the option of 1 metre distancing but with additional protection such as face coverings, Perspex screens, recording contact details and time limitations in place. This percentage has increased y from 46% in November 2020.
- Population groups most likely to feel comfortable with 1 metre distancing with additional protections included those aged under 45 (67%) and members of the more affluent ABC1 socio-economic groups (62%).
- In contrast less than half of the population were comfortable with 1 metre distancing without other protections (37%) or no social distancing being required at all (24%).

Figure 26 – 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 = 1,071

Most are interested in attending outdoor arts events, in particular drive in events, open air performances and park and street 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 27 were of interest. Similar to November, the largest percentages indicated that outdoor events were of interest while around two in five were interested in online events.

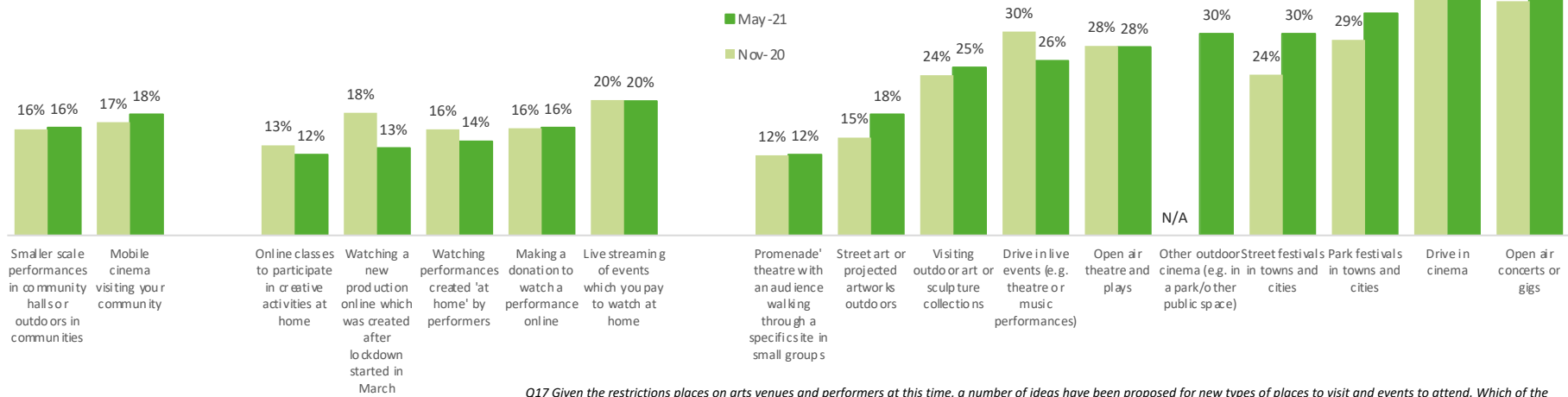
- Possibly reflecting the time of year of surveying, the appeal of a number of the outdoor events increased in particular park and street festivals. Levels of interest in outdoor events were highest amongst women (78% vs 70% of men), people aged under 45 (82% vs 68% aged 45+) and people with children at home (80% vs 71% with no children).

Figure 27 – Interest in attending new types of places to visit and events to attend

Other events – 27% overall
(26% in November 2020)

Online events – 38% overall
(42% in November 2020)

Outdoor events – 74% overall
(70% in November 2020)

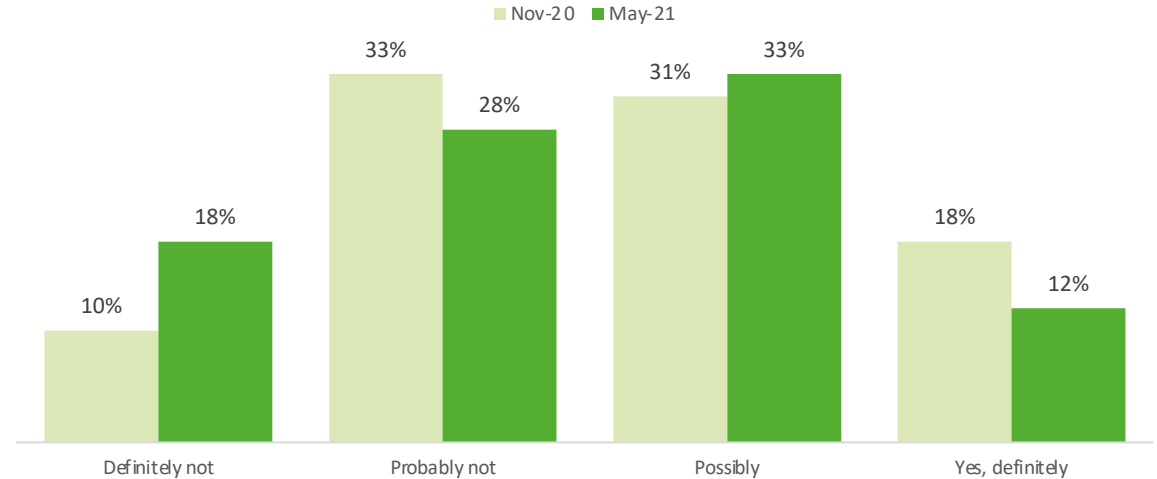


Q17 Given the restrictions places on arts venues and performers at this time, a number of ideas have been proposed for new types of places to visit and events to attend. Which of the following would you be most interested in attending if offered in they were available to you? Base: all respondents = 1071

1 in 8 would definitely be interested in engaging in cultural events online in future

- 12% of the population would definitely be interested in engaging with online cultural events in future, a decrease from 18% recorded in November 2020. A further third (33%) stated that they would possibly be interested.
- Groups most likely to state that they would definitely be interested included those aged under 45 (18% vs 8% aged 45+), people with children at home (20%), people with a disability or long term illness (19%) and members of the BAME population (28%).
- When asked to give more details, common responses amongst those who stated that online events appealed to them included feeling safer if they could engage online, preferring the convenience/comfort of staying at home and finding online events to be enjoyable or a new and interesting way to experience the arts.
- However those who would not like to engage online most commonly cited concerns regarding the lack of atmosphere, general preference to see live, in person performances and technical concerns (e.g. over sound quality or broadband capacity).

Figure 28 – Interest in engaging with cultural events online

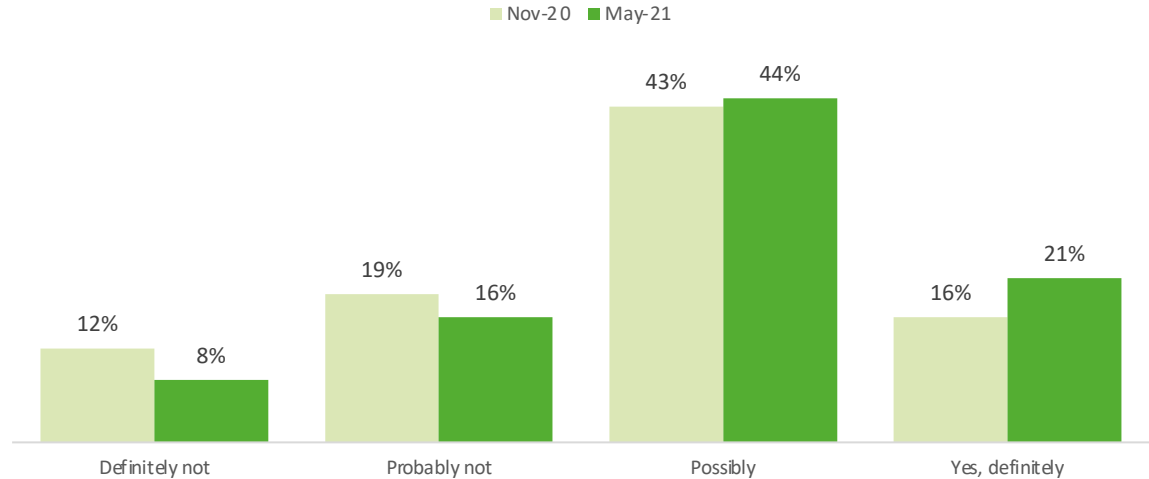


Q15D Whilst in person/ live cultural events are starting to take place again now, some venues and performers have plans to also continue to offer content online, continuing some of the virtual events which have been successful during the lockdown periods or making these into 'hybrid' events with a mix of online and in person content. Looking to the future, would you be interested in engaging with these types of cultural events online? Base: all respondents = 1,071

Two-thirds of the population would be interested in engaging with cultural events outdoors

- 21% of the population would definitely be interested in engaging with outdoor cultural events if they were unable to attend events at indoor venues, an increase from 16% recorded in November 2020. A further 44% would possibly be interested.
- Population groups most likely to say that they would definitely be interested in engaging with outdoor events included those aged 16-44 (29% vs 15% aged 45+) and members of the BAME population (35%).
- When asked to give more details, common responses amongst those who stated that outdoor events appealed to them included feeling safer outdoors due to the fresh air and greater ability to social distance and a general preference to spend time outdoors and in nature.
- However the most common concerns amongst those not interested included concerns that social distancing would still be difficult to maintain, events would be overly weather dependant and a general lack of interest to attend cultural events.

Figure 29 – Interest in engaging with cultural events outdoors if unable to go to events in an indoors venue

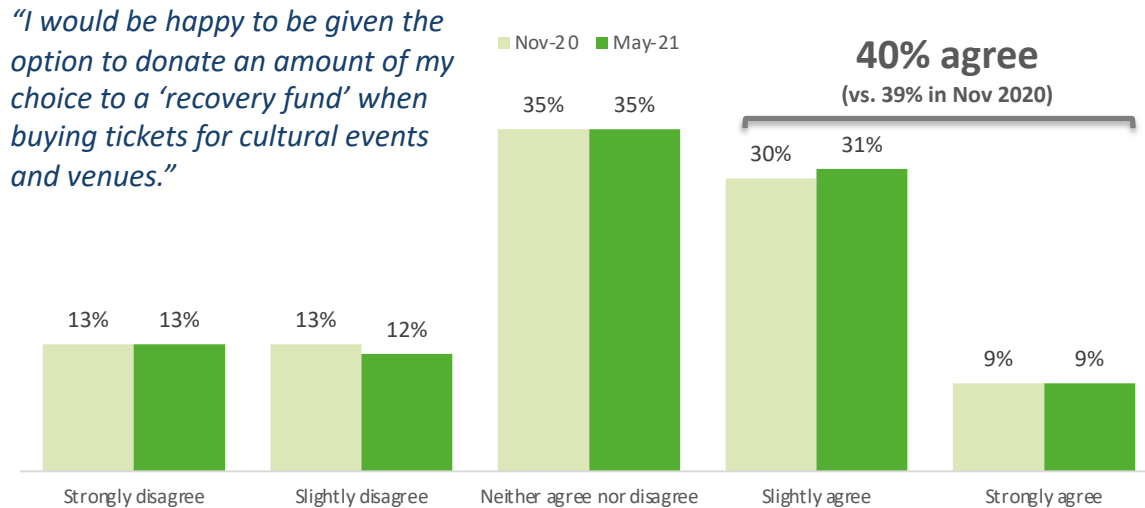


Q15G If you were unable to go to cultural events in an indoors venue for the foreseeable future, would you be interested in engaging with cultural events outdoors?
Base: all respondents = 1,071

Two-fifths would be happy to be given the option to donate to a recovery fund when buying tickets for cultural events and venues

- 40% were supportive of the idea of being able to make a voluntary donation to a 'recovery fund' when buying tickets for cultural events and venues, a similar percentage to that recorded in November 2020.
- Population groups most likely to agree with this suggestion included those aged under 45 (47% vs 35% aged 45+) and people who attended any cultural activities in the 12 months prior to the first lockdown – particularly those people who had been to classical music performances (61% agreed), live comedy (58%) or book festivals (58%).

Figure 30 – Attitudes to payment and funding of arts events in the future



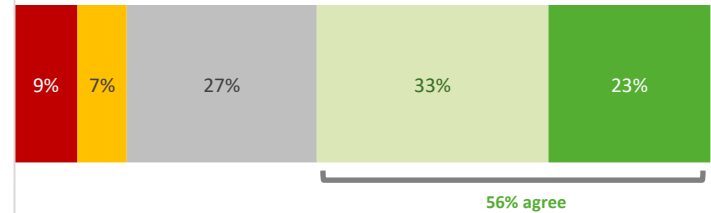
Q18 Still thinking to the future, please indicate if you personally agree or disagree with the following statements Base: all respondents = 1,071

Just over half of the population support the idea of cultural events only being available to people who have just obtained a negative Covid test

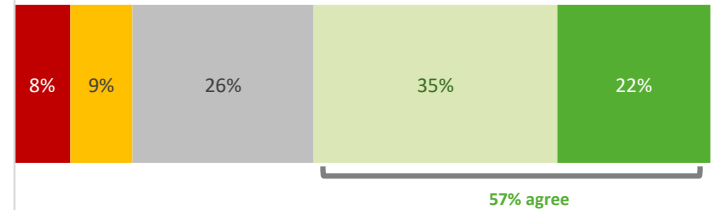
- Respondents were asked to what extent, if any, they agreed with the statements shown in Figure 31 relating to the use of testing before audiences attend cultural shows and event.
- 56% agreed that they support the idea of events only being available to people who have just obtained a negative test. People most likely to agree with this statement included those who attended cultural events or places in the 12 months before lockdown and those people who also stated that they had missed going to cultural events and venues (63%).
- A similar percentage (57%) agreed that they would only feel comfortable attending a show/event if they knew all other audience members has just obtained a negative Covid test result. Agreement with this statement was higher amongst women (60% vs 55% of men), people aged 65 and over (67%) and people who had at some point been advised by their GP to stay at home and shield because of Covid 19 (71%).

Figure 31 – Attitudes to Covid-19 testing

I support the idea of shows/events only being available to people who have just obtained a negative result in Covid-19 test



I would only feel comfortable attending a show/event if I knew all other members of the audience have just obtained a negative result in Covid-19 test



■ Strongly disagree ■ Slightly disagree ■ Neither agree nor disagree ■ Slightly agree ■ Strongly agree

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



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