Creative Scotland

COVID-19 Population Survey

Wave 4 – Feb 2022

56 DEGREE INSIGHT

CREATIVE SCOTLAND
ALBA | CHRUTHACHAIL

Background

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

The first wave of research, completed in August 2020, invited participants to complete an online survey, a representative sample of the Scottish population. A subsequent second and third wave of the report were undertaken in November 2020 and May 2021, to allow for comparison of how attitudes had changed since the summer of 2020. The findings of these first three waves are available on the Creative Scotland website.

This report sets out the findings of the fourth wave of the research, with fieldwork undertaken between the 12th and 31st February 2022. Much like the previous waves, this report aims to update our understanding of public opinion on returning to cultural activity. It enables comparison to understand how attitudes have changed since 2020, with geographic and demographic quota controls used to ensure that the sample was representative of the population. 1,105 surveys were conducted in the fourth wave, with an accompanying boost of 100 surveys conducted with people from a BAME background to allow for comparative analysis of results for this group.

In addition, this latest report considers emergent barriers to cultural participation, such as new COVID-19 variants, seasonal engagement and the rising cost of living that could impact comfort levels and booking patterns in the future. As the Scottish population begins to adapt to living with COVID, this survey aims to reveal what a 'new normal' will look like for the arts and cultural sector.

Respondents were asked their opinions about four main topics:

When will audiences return to cultural activity?

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

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

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

This summary report provides the key findings from this fourth wave of research. To access the full report, go to: https://www.creativescotland.com/our-research

Introduction

Although Scotland has seen the phased easing of COVID-19 lockdown restrictions and undergone an intensive vaccination programme, the impact of COVID-19 is likely to be felt for some time to come. This survey research, commissioned by Creative Scotland and undertaken by 56 Degree Insight in February 2022, aims to better understand the Scottish population's attitudes to attending cultural events and venues.

Encouragingly, findings show that public comfort levels with attending arts and cultural events and venues are increasing. However, demand remains suppressed compared to pre-pandemic levels. In the context of new variants such as Omicron and the rising cost of living, unpredictable periods of vulnerability are an ongoing concern for the creative sectors and may require sector wide support, planning and resilience. This potential seasonality may influence public demand, with further variances between organisations, art forms and the venues in which work is presented:

Attitudes to culture

- The majority of Scotland's population have missed attending cultural venues and events since the pandemic started, with 16% of the adult population in Scotland having noticed that arts and culture have become more important to them over this period.
- Just over half of the population remain worried about the potential health impacts of COVID-19.
- Over 50% of the population support the idea of cultural events only being available to people who have been fully vaccinated or who have just obtained a negative COVID-19 test.

Participating at home

- During the last six months, increases in participation in at-home activities were most pronounced for watching films, drama or documentary series on streaming services, listening to audiobooks or podcasts, and paying to watch films or other premium content.
- Comparison to previous waves suggests that some of these changed at-home behaviours have become longer lasting habits even as venues and events have reopened.
- Compared to 2020/21, fewer viewers of performances and cultural activity presented online paid or made a donation – and only a fifth would be open to paying for cultural content of this kind in the future.

Returning to in-person cultural activity

- Half of the population took part in 'live' cultural activity during the last six months, with much higher levels of participation than during the initial post lockdown periods in 2020 and 2021.
- Reported experiences of attending cultural activities have improved on previous survey waves, particularly in relation to theatre, museums and galleries.
- An increasing percentage of the population feel ready to attend arts and cultural events and venues.

Potential barriers to engagement

- Demand for some activity remains lower than before COVID-19, most notably theatre, activities for children, dance and classical music performances. 21% of the population still say they will avoid certain events for the foreseeable future.
- Almost a third of respondents changed plans to attend arts or cultural events due to rising cases of Omicron in the winter period.
- Over a third agree that they may avoid booking to attend events in winter given the risk of increasing COVID-19 cases and new restrictions. Outdoor arts activity is of most interest to potential attendees.

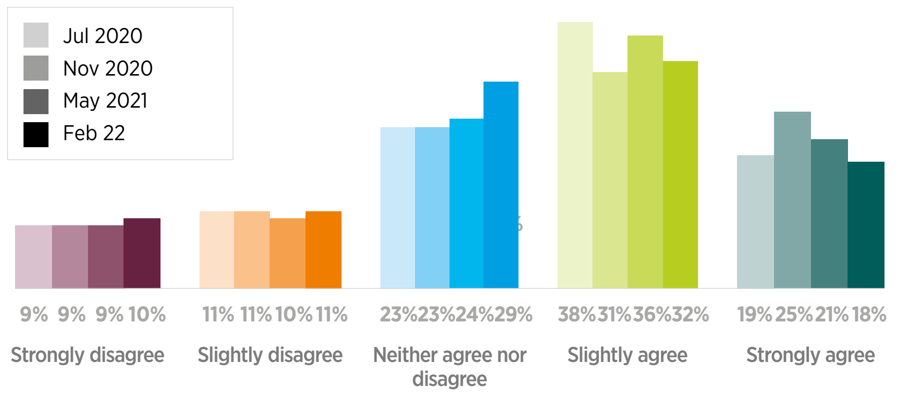
Finances

- A third of the population would be happy to be given the option to donate to a 'recovery fund' when buying tickets for cultural events and venues.
- Half of the population are worried about their household finances in the year ahead and responses suggest that these concerns could have a particularly negative impact on participation in cultural activities, especially cinema, theatre and live music.

Attitudes to culture

Much like previous waves, half of the population agreed or strongly agreed that they have missed cultural events and venues since the initial lockdown began in late March 2020, and only just over 20% disagreed (**Figure 1**). While this percentage is slightly lower than that recorded in the previous survey waves when many venues remained closed, a majority of the adult population in Scotland (69%) indicated that arts and culture have remained as important to them as they were before the pandemic. In addition, 16% noted arts and culture had become even more important over this period. When asked 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.

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



50%

Agree they have missed cultural events

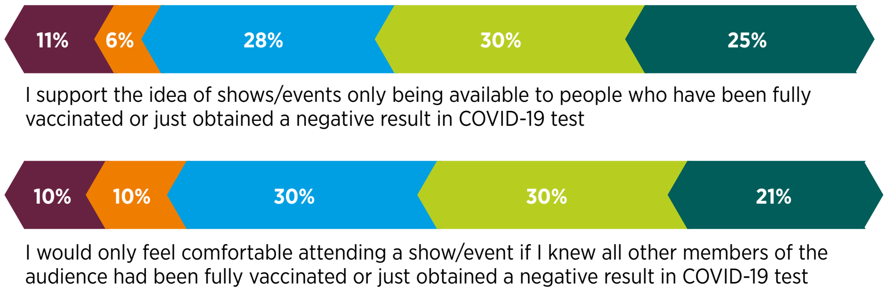
Just over half of the population (55%) remain worried about the potential health impacts of COVID-19, a similar percentage to May 2021 (57%) but much lower than recorded in November 2020 (68%). In February 2022, as in previous waves, this concern was greater amongst people aged 65+ and people with a long-term illness or disability.

Respondents were asked to comment on factors that were important to them when deciding on whether to attend different arts and cultural activities. This open question received varied responses. In February 2022, the most frequently provided responses related to the enforcement of COVID-19 restrictions (17%) and controls on reduced capacity at events and venues (16%), although the levels of these types of concerns have decreased since May 2021. In addition, 16% also noted they no longer had COVID-19 related concerns, an increase from the levels recorded in the 2020 and 2021 survey waves.

16%

No longer have COVID-19 related concerns.

Figure 2: 'Please indicate if you personally agree or disagree with the following statements'



(Due to rounding, percentages may not always appear to add up to 100%)

- Strongly disagree
- Slightly disagree
- Neither agree nor disagree
- Slightly agree
- Strongly agree

Just over half of the population (55%) support the idea of cultural events only being available to people who have been fully vaccinated or who have just obtained a negative COVID-19 test (**Figure 2**). However just over one in ten strongly disagreed with this idea. In May 2021, similar results to these were obtained to a question relating to audience members showing a recent negative test (56% for and 9% against) which may suggest opinions are not shifting for either extreme.

55%

Support the idea of cultural events only being available to people who have been fully vaccinated or who have just obtained a negative COVID-19 test.

Participating at home

During the last six months, most of the population continue to report increased participation in certain in-home cultural activities in comparison to pre-pandemic levels (**Figure 3**). Comparing these results with those from May 2021 would suggest that during the last six months a lower percentage watched arts performances online or attended an online class or course.

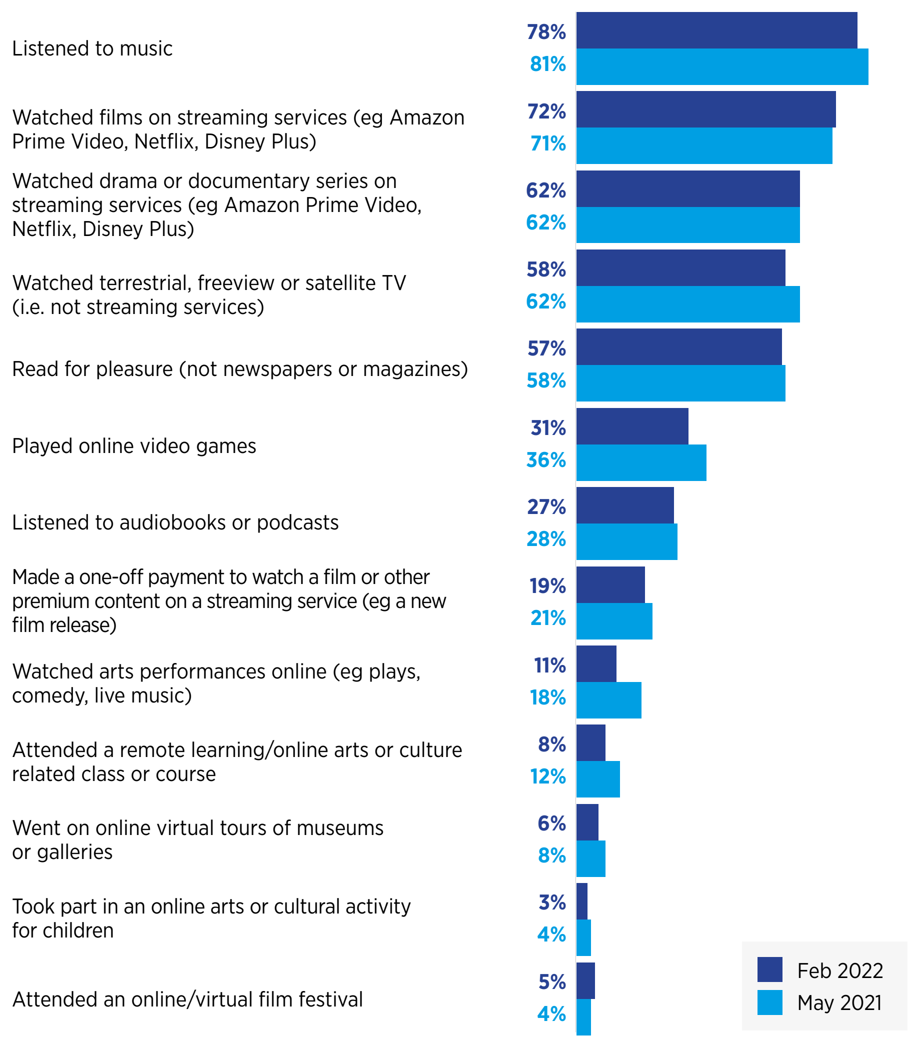
While a very small percentage of the population reported less engagement with culture at home, around a third or more reported a sustained increase in screen-based activity such as watching films (72%), and drama or documentaries on streaming services (62%). Notably, the engagement levels reported in February 2022 are broadly similar to those recorded during May 2021. This suggests that some of the changes in behaviours caused by the pandemic have become longer lasting habits even as venues and events have reopened.

20%

Of the population would pay for performances/cultural activity online.

Only a fifth of the population would be open to paying for performances or cultural activity presented online in the future, and 41% disagreed with this suggestion (20% strongly). With similar levels of agreement and disagreement during the 2020 and 2021 survey waves, these results suggest that at the population level there is a limited appetite for online content of this kind. However, levels of agreement were higher amongst people from a BAME background (38%), people aged 16-34 (33%) and people with children at home (29%).

Figure 3: Which of the following cultural activities, if any, have you done at home?



Returning to in-person cultural activity

Half of the population took part in an 'out of home' cultural activity during the last six months with much higher levels of participation than during the initial post lockdown periods in 2020 and 2021 (**Figure 4**). Overall, this represents a 41% increase for cinema, museum and gallery visits or attended performances. Encouragingly, all levels of engagement recorded were higher than when the same question was asked during spring 2021 and summer 2020, reflecting the relaxation of restrictions over this period.

50%

Of the population took part in 'out of home' cultural activity in the last 6 months.

In general, experiences of attending cultural activities have improved, particularly in relation to theatre, museums and galleries. While responses continued to be varied with only around 50% selecting 'very good' for any of the activities presented, satisfaction levels were higher than those recorded in 2020 and 2021. When asked to comment further on their experiences, many respondents stated that they enjoyed the experience, and some praised the measures in place to stop COVID-19 spread. However, others commented that measures such as mask wearing had a negative impact on the quality of their experience.

Respondents were asked to rate their desire to take part in a range of leisure activities. While current levels of desire for cultural participation are at similar levels to those recorded in 2021, they remain higher than levels recorded in 2020 (**Figure 5**). Like previous waves, arts and cultural activities were generally listed slightly lower than other types of leisure activity, with cinema visits ranked higher (5.9), closely followed by museums (5.6), theatres (5.3), galleries (5.3), and finally attending live music events or gigs (5.1). For the first time, meeting up with friends or family both indoors or outdoors was included in this list and received the highest ranking of all options (7.7).

Figure 4: Which of the following activities, if any, have you done in Scotland during the last six months?

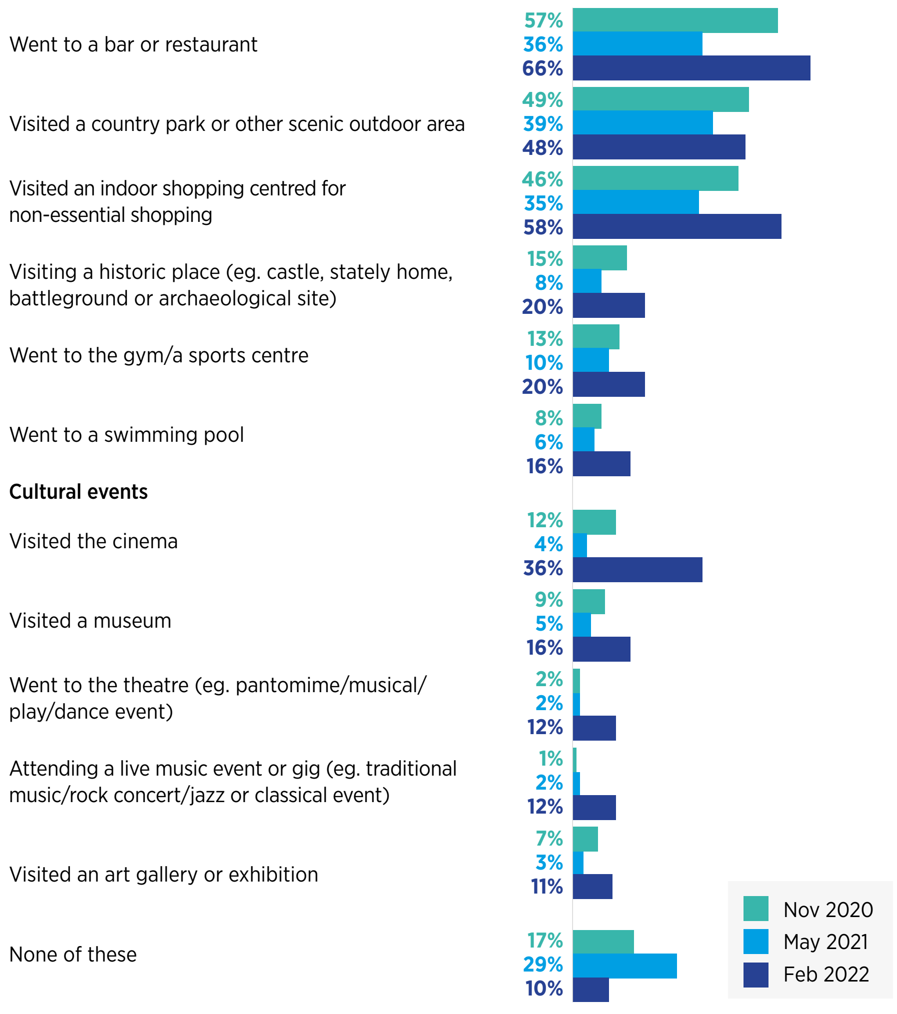


Figure 5: Thinking about how you feel at the moment, how likely would you be to do this type of activity?

Activity	Feb 22	May 21	Nov 20	Jul 20
Meeting up with friends or family outdoors (in a garden or outdoor venue)	7.7	n/a		
Meeting up with friends or family indoors (in a household or indoor venue)	7.6	n/a		
Visiting a country park/scenic outdoor area	7.4	7.6	7.3	7.5
Going to a bar or restaurant	7.2	7.2	6.6	6.3
Indoor shopping centre	7.0	7.1	6.5	6.2
Visiting a historic place	6.0	6.4	6.0	6.2
Visiting the cinema	5.9	5.9	5.5	5.1
Visiting a museum	5.6	6.1	5.5	5.6
Going to the theatre	5.4	5.6	5.1	4.9
Visiting an art gallery or exhibition	5.3	5.5	5.1	5.3
Attending a live music event or gig	5.1	5.3	5.0	4.9
Going to a swimming pool	4.5	4.7	4.2	4.0
Going to a gym or sports centre	4.4	4.3	4.1	4.0

1 Extremely unlikely **10** Extremely likely

An increasing percentage of the population feel ready to attend arts and cultural events and venues, with over four in five noting they would attend art galleries, museums, theatre and live music in the future, and between 9% and 16% indicated they planned to attend these cultural events and spaces as soon as possible (**Figure 6**). When asked to specify which cultural activities they were most looking forward to attending, results across all survey waves from 2020 to 2022 are fairly consistent. At a population level, half of respondents were most eager to return to the cinema with another third looked forward to returning to live music or theatre.

Figure 6: Which, if any, of the following best describes when you would feel happy to do this type of activity?

Activity	Plan to attend as soon as possible	Would visit – but would wait a few weeks	Would visit – but would be in no hurry to do so	Would not visit in the foreseeable future	% would attend Feb 22	May 21	Nov 20	Jul 20
Visiting a country park/scenic outdoor area	20%	57%	12%	10%	90%	94%	93%	92%
Visiting a historic place	10%	61%	19%	10%	90%	85%	82%	81%
Visiting an art gallery or exhibition	9%	58%	21%	12%	88%	78%	72%	73%
Visiting a museum	9%	58%	20%	13%	87%	83%	76%	80%
Going to the theatre	12%	47%	25%	16%	84%	73%	66%	63%
Visiting an indoor shopping centre for non essential shopping	16%	42%	25%	17%	83%	90%	87%	85%
Attending a live music event or gig	16%	39%	25%	19%	81%	73%	61%	57%
Going to a bar or restaurant	16%	35%	29%	20%	80%	90%	85%	84%
Visiting the cinema	12%	40%	27%	21%	79%	77%	70%	68%
Going to a swimming pool	12%	37%	26%	25%	75%	68%	60%	55%
Going to a gym or sports centre	13%	35%	27%	25%	75%	66%	63%	61%

(Due to rounding, percentages may not always appear to add up to 100%)

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

Potential Barriers to engagement

However, demand for some activity remains lower when compared to the levels of interest indicated before COVID-19. Respondents were asked how their appetite for different cultural activities and events had changed compared to pre-pandemic, and were given the options ‘more likely to consider,’ ‘no difference,’ ‘less likely to consider’ and ‘would not have considered before and still would not’ (**Figure 7**). Most notable drops in demand were recorded for theatre (net change -13), activities for children (-11), dance (-12) and classical music performances (-13). In addition, while half of the population now feel happy to attend the same cultural events they would have gone to pre-pandemic, 21% of the population still say they will avoid certain events for the foreseeable future.

Over 1 in 5

Of the population still say that they will avoid certain events.

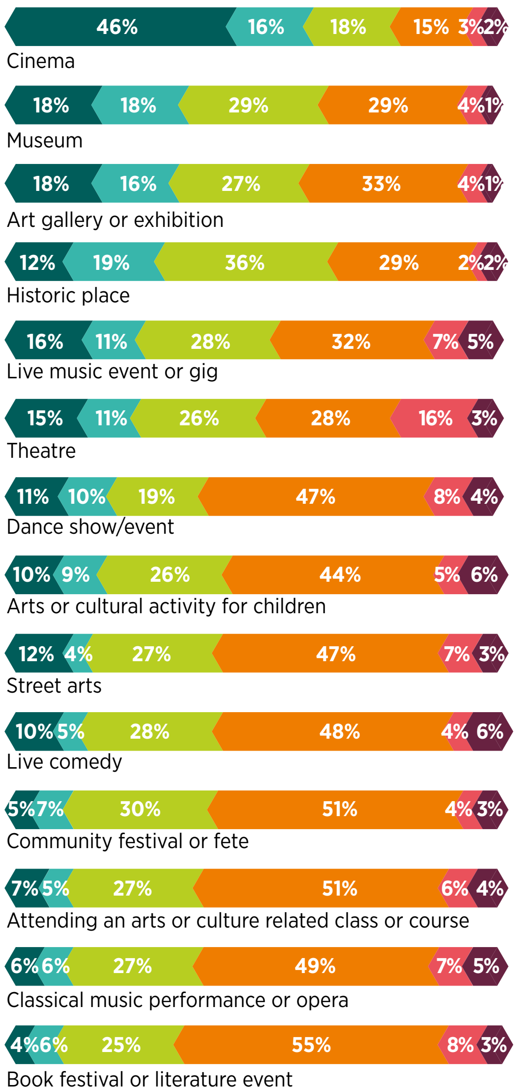
There is evidence that people may be more likely to attend cultural events in the spring and summer months. Respondents who had booked or were planning to attend events or activities were asked when they expected to attend (**Figure 8**). 62% expected to attend the cinema within the next two or three months and around a third also expected to attend museums or art galleries within this period. In contrast, plans to attend live comedy, community events, art classes classical music performances or literature events were more likely to be further in the future, from July to September.

Figure 7: How have your preferences changed compared with what you might have chosen to do before the COVID-19 outbreak?

	Less likely	More likely	Net change Feb 22	May 21	Nov 20	Jul 20
Historic place	-14%	17%	+2	+6	-5	-5
Street arts	-19%	20%	+1	-	-18	-24
Cinema	-17%	15%	-2	-3	-11	-13
Community Festival or fete	-17%	14%	-3	-6	-14	-17
Live comedy	-18%	13%	-4	-	-11	-12
Museum	-20%	15%	-5	-8	-20	-23
Live music event	-21%	14%	-7	-2	-19	-20
Art gallery or exhibition	-21%	14%	-8	-9	-17	-18
Attending arts or culture class or course	-23%	15%	-8	-3	-16	-19
Book festival or literature event	-24%	16%	-8	-5	-18	-26
Theatre eg pantomime/musical/play	-23%	13%	-10	-6	-25	-26
Arts or cultural activity for children	-23%	12%	-11	-7	-19	-20
Dance show/event eg ballet performance	-24%	11%	-12	-10	-24	-24
Classical music performance or opera	-24%	11%	-13	-11	-24	-23

(Due to rounding, some of the percentages presented may not tally exactly with the net change figure)

Figure 8: When do you expect to attend this activity?



	Feb–Apr 22	Later in 22
Cinema	62%	36%
Museum	36%	62%
Art gallery or exhibition	34%	64%
Historic place	31%	67%
Live music event or gig	27%	67%
Theatre	26%	70%
Dance show/event	21%	74%
Arts or cultural activity for children	19%	75%
Street arts	16%	81%
Live comedy	15%	80%
Community festival or fete	12%	84%
Attending an arts or culture related class or course	12%	85%
Classical music performance or opera	12%	83%
Book festival or literature event	10%	88%

(Due to rounding, percentages may not always appear to add up to 100%)

Feb or Mar
Apr
May or Jun
Jul to Sep
Oct to Dec
In 2023 or later

Almost a third of the population reported having changed plans to attend arts or cultural events due to rising cases of Omicron and resulting new restrictions, closures, and cancellations. In almost half of cases, the event itself was cancelled. In these instances, under 50% of respondents reported receiving a full refund. In other cases, respondents decided not to attend, either due to concerns over increasing risk of infection (40%), decisions to prioritise other social meetings (31%) or because they were required to self-isolate (11%).

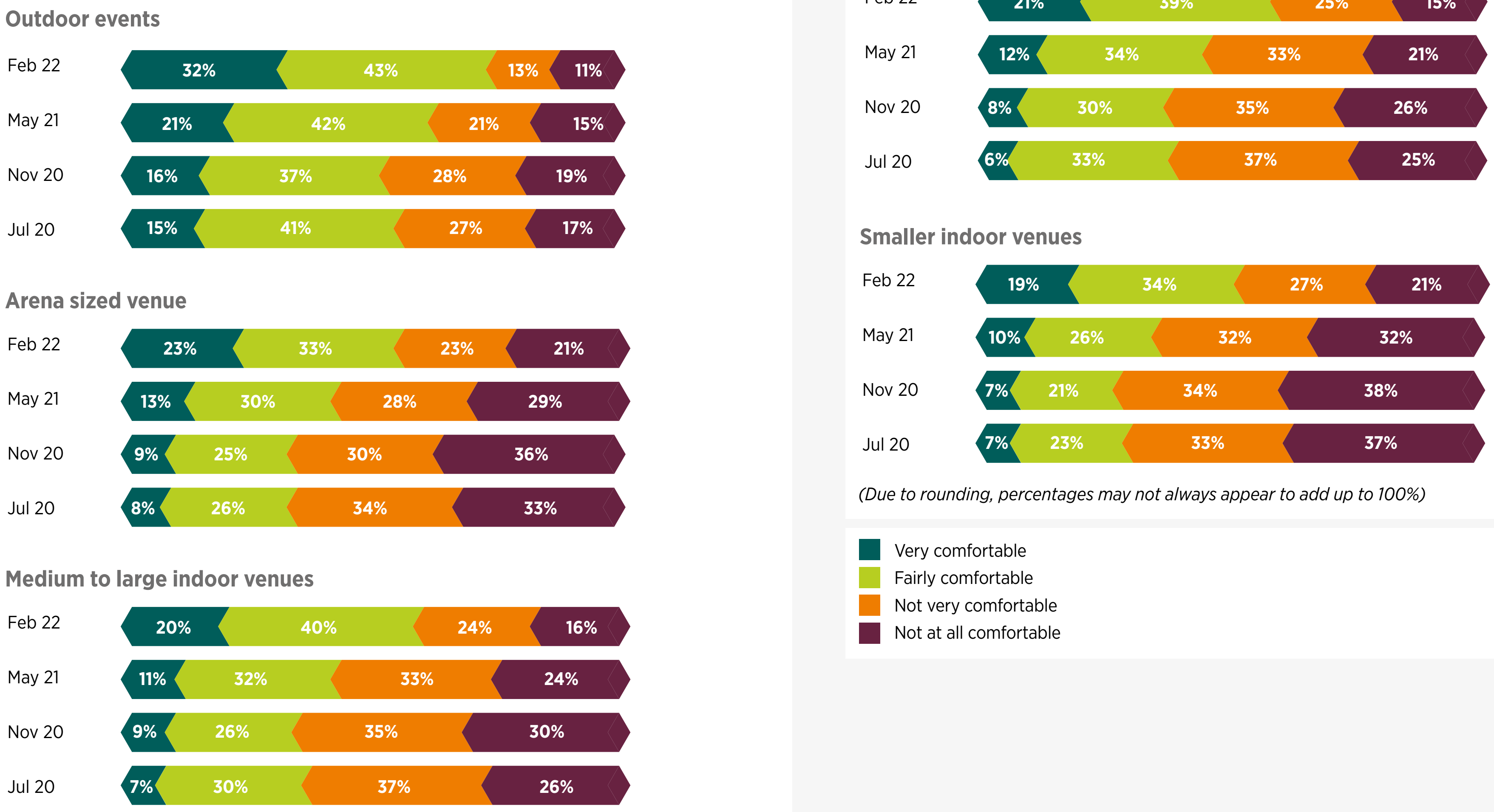
31%

Of the population changed plans to attend arts or cultural events due to Omicron.

When respondents were asked if the time of year has some impact on their likelihood to book tickets to attend a cultural event, the main reasons given were the weather or the timing of events (e.g. Edinburgh Festivals). Very few (less than 10 respondents overall of 1,105 sample) referenced concerns relating to higher COVID-19 case rates and/or risks of tighter restrictions during winter as a consideration.

However, when prompted, two in five agreed with the statement, ‘I'd avoid booking to attend any shows/events taking place next winter given the risk of a further rise in COVID-19 cases and new restrictions’ Given the apparent contradiction between responses to these questions, it is challenging to establish how concerns over winter restrictions may affect seasonal booking patterns. A much-increased percentage of the population now feel comfortable attending venues to watch performances, especially at larger sized venues, but outdoor performances continue to be of most interest to potential attendees (**Figure 9**).

Figure 9: How do you feel about going to the following places to watch performances in the near future?



(Due to rounding, percentages may not always appear to add up to 100%)

Finances

A third of the population were supportive of being able to make a voluntary donation to a 'recovery fund' when buying tickets for cultural events and venues, a lower percentage to that recorded in May 2021 and November 2020. Population groups most likely to agree with this suggestion included those aged under 45 (44% vs 30% aged 45+) and people who indicated that arts and culture had become more important to them during the pandemic (64% agreed).

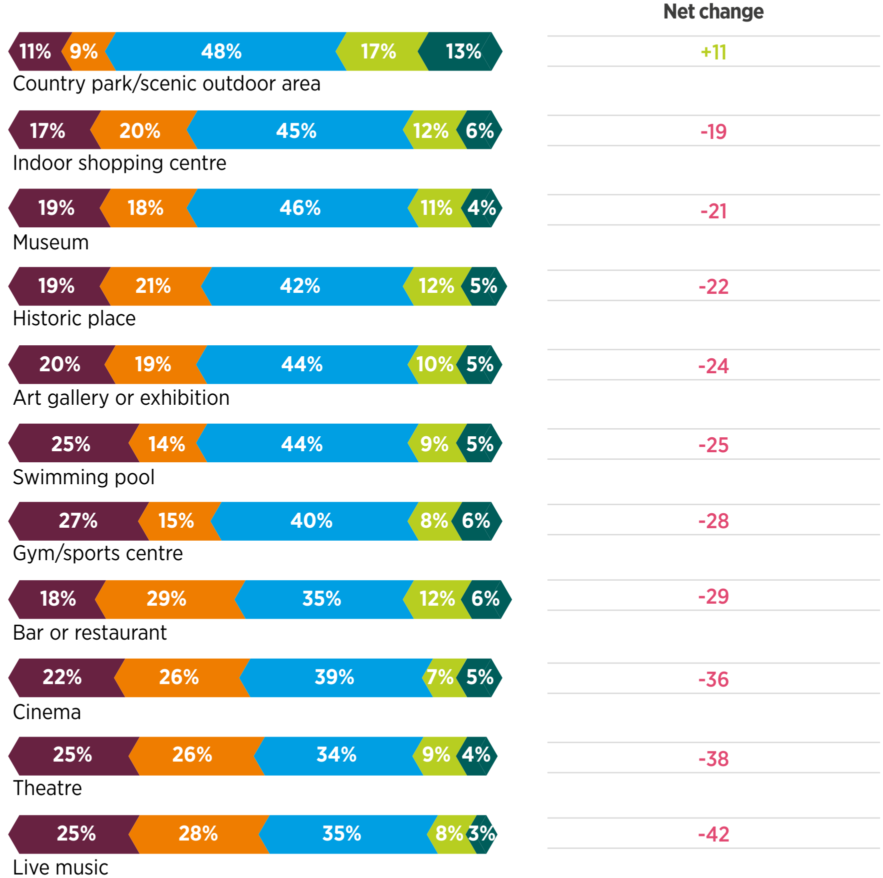
33%

Of the population were supportive of making a voluntary donation to a 'recovery fund'.

Given the increasing cost of living crisis facing the UK, respondents were asked a short series of question relating to household finances. Around half of the population agree to some extent that they are worried about their household's finances for the year ahead. It should be noted however, that this survey wave was conducted before the current crisis in Ukraine, and it could be assumed that the percentage with concerns over household finances may have risen since.

Those who noted worries about household finances were shown the list of activities in **Figure 10** and asked to what extent, if any, they would be more or less likely to do each given these concerns. While an increased proportion of these respondents were more willing to visit country parks and scenic areas, the activities most likely to be negatively affected included visiting the cinema, attending the theatre, and going to live music events.

Figure 10: To what extent, if any, do you feel that you and your household are any more or less likely to do the following in future?



(Due to rounding, percentages may not always appear to add up to 100%)

Much less likely to do
Slightly less likely to do
No change
Slightly more likely to do
Much more likely to do

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