



# Covid 19: Public intentions on returning as audience members

Wave 4 report  
(Fieldwork from 12<sup>th</sup> to 31<sup>st</sup> February  
2022)

Creative Scotland  
11<sup>th</sup> March 2022



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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, a round 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

Early in the pandemic 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 have been addressed by this research through a series of survey waves conducted with the Scottish population between July 2020 and February 2022.

## 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.

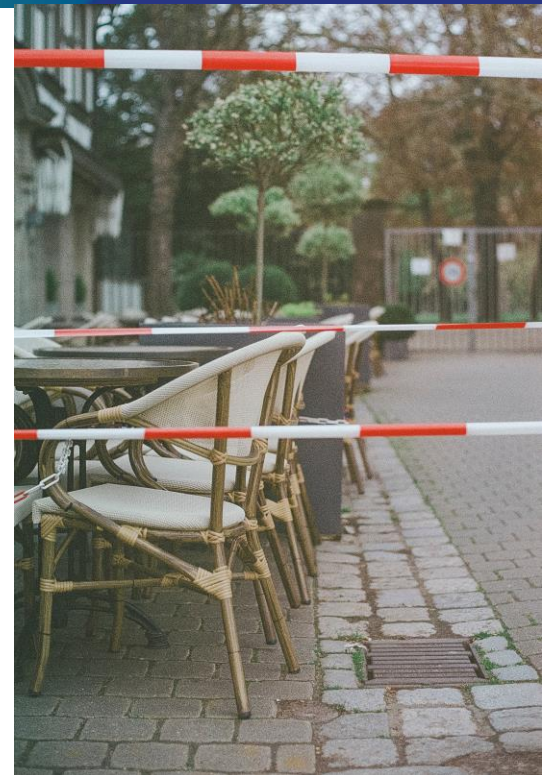
### How will the picture vary between sub sectors, organisations, location and content?

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, May 2021 and February 2022 to measure and track the Scottish adult population's behaviours and attitudes toward arts attendance. This report provides results from the fourth wave of this study.
- An online approach has been used with fieldwork for the fourth wave undertaken between the 12<sup>th</sup> and 31<sup>st</sup> February 2022. The previous three waves took place from 27<sup>th</sup> July to 2<sup>nd</sup> August 2020, 6<sup>th</sup> to 23<sup>rd</sup> November 2020 and 7<sup>th</sup> and 17<sup>th</sup> May 2021.
- 1,105 interviews were conducted in the fourth 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
<b>Sex</b>	
Male	512
Female	588
Other	5
<b>Age</b>	
16-34	308
35-54	360
55+	437
<b>Socio-economic group</b>	
ABC1	591
C2DE	514
<b>Ethnicity</b>	
White	976
BAME	129



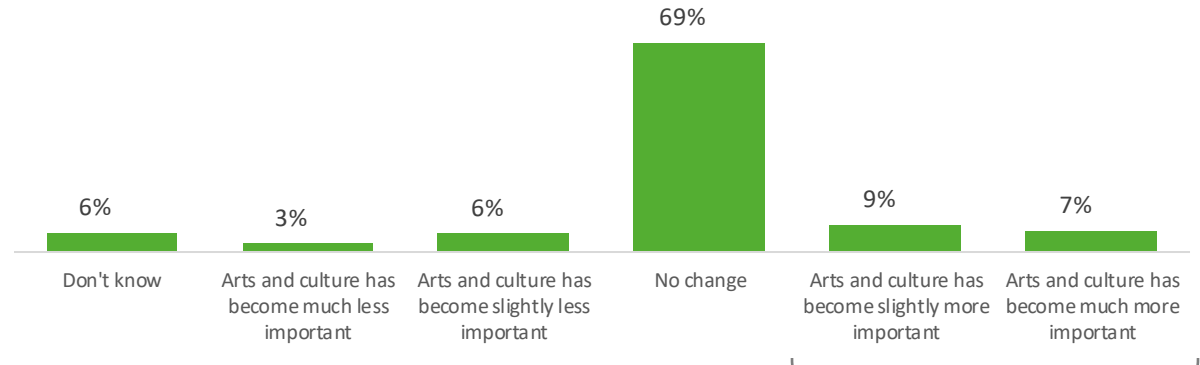
# Cultural engagement during the pandemic



# Arts and cultural activities have increased in importance for 1 in 6 people during the Covid-19 pandemic

- Reflecting on the period since the start of the Covid 19 pandemic and when the first lockdown began in March 2020, 16% of the adult population in Scotland have noticed that arts and culture have become more important to them over this period. This percentage is a reduction on that recorded in May 2021 (21%).
- 69% feel that the importance of the arts and culture has not changed while it has become less important for 9% of the population.
- Groups most likely to state that arts and culture have become more important include members of the BAME population, people aged 18 to 34 and people with children in their household.
- 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. 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 16% overall  
(vs. 21% in May 2021)**

Higher amongst:

Members of BAME population (29%)

People aged 18-34 (26%)

People with children in household (23%)

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 =1,105



# 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... (16% of population)

*"Have a great passion for theatre and having had to miss over 30 shows to lockdowns has really badly affected my mental health."*

*"It was such a big and regular part of my life before lockdown, enjoyed a shared audience experience at live events and meeting people or going to events with friends. I really missed it."*

*"It has helped me keep my mental health and wellbeing in a good place."*

*"I think that during lockdown I have had a greater appreciation for the different styles of art and culture activities and would like to further explore that."*

*"I missed it during the lockdown and these kinds of events would have lost a lot of income from the lockdown so I want to help them keep going."*

*"It is a way to escape the pressures of everyday life and would give me a feeling of connection with both the audience and performers."*

Why arts and cultural activities have become less important because of the Covid-19 pandemic... (9% of population)

*"I say this because my safety became a priority. I don't need to be out there, really, I realised."*

*"would rather spend time outdoors and visiting family."*

*"Exercise and appreciation of the great outdoors is much more important."*

*"Trying to keep going in this time takes up all my energy."*

*"There are many more important factors in my life."*

*"Until life gets completely back to normal I don't have the same interest."*

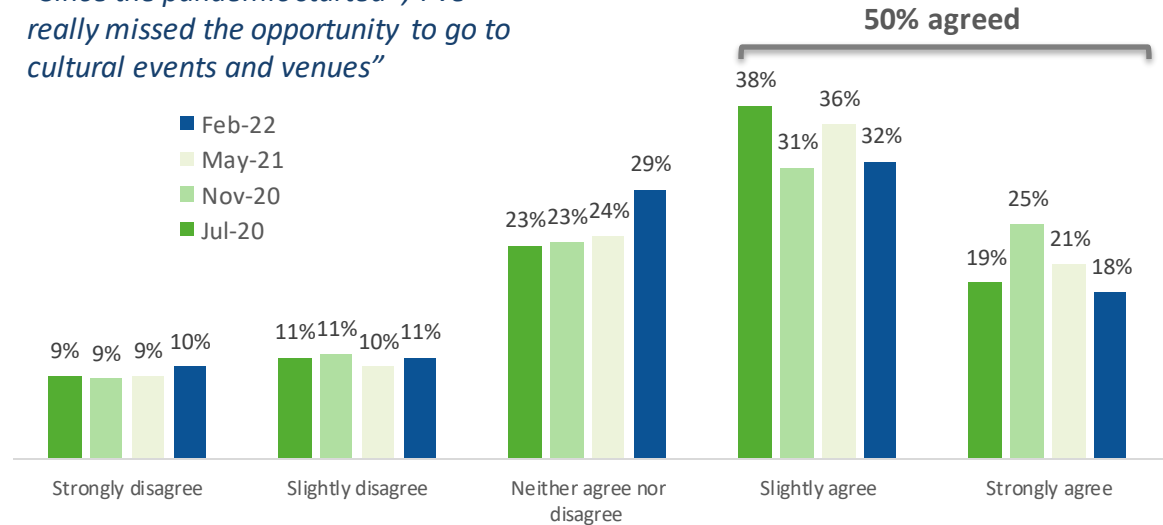
*"You can live without it, if you catch covid you might die."*

# Half of the population have missed the opportunity to go to cultural venues and events since the pandemic started

- Reflecting on the period since the initial lockdown began in late March 2020, half of the population (50%) either slightly or strongly agreed that they have missed the opportunity to go to cultural events and venues.
- This percentage is slightly lower than that recorded in the previous survey waves when many venues remained closed.
- The percentage who strongly agreed with this statement was higher amongst women than men (53% vs 47%) and amongst more affluent ABC1 socioeconomic groups (57% vs 43% of C2DEs).

Figure 2 – Level of agreement with statement

*“Since the pandemic started\*, I’ve really missed the opportunity to go to cultural events and venues”*

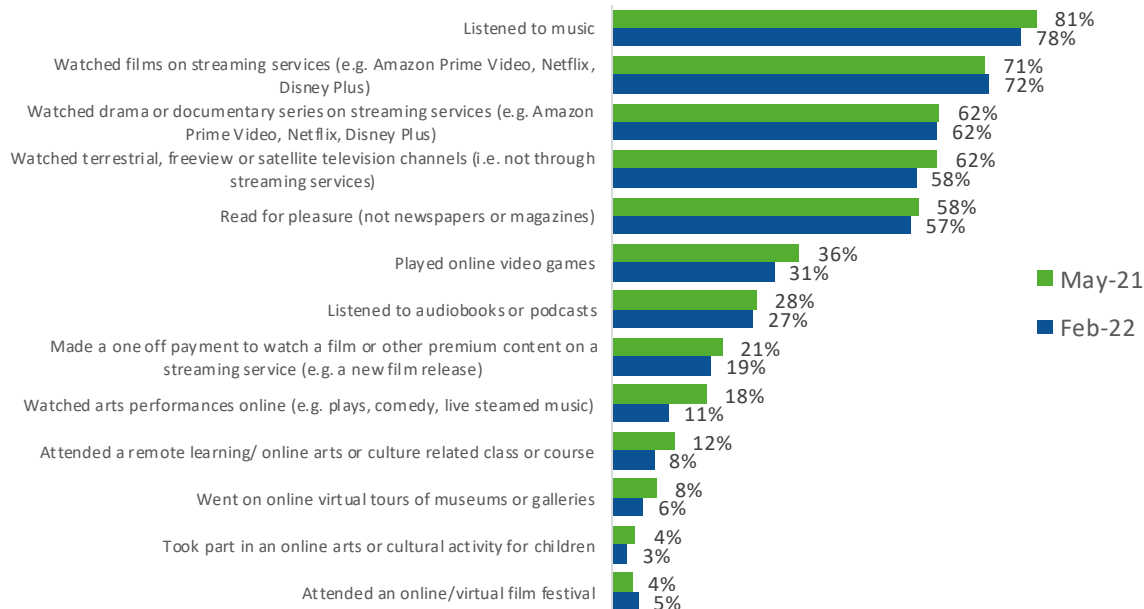


9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,105 \*In waves 1 to 3 worded as “Since lockdown..”

# During the last 6 months 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 during the last 6 months. This question was previously asked in May 2021 in relation to the whole period since the first lockdown began on 23<sup>rd</sup> March 2020.
- The most commonly undertaken activities during the last 6 months were listening to music (78%) and watching films on streaming services (72%) while over half had watched dramas or documentaries (62%), watched television (58%) and/or read for pleasure (57%).
- Comparing results for the two periods suggest that compared to the period from March 2020 to May 2021, during the last 6 months a lower percentage played online games, watched arts performances online or attended an online class or course. However participation in other at home activities remained at similar levels.

Figure 3 – Activities undertaken at home during last 6 months (compared to since pandemic began in Jul'21 wave)

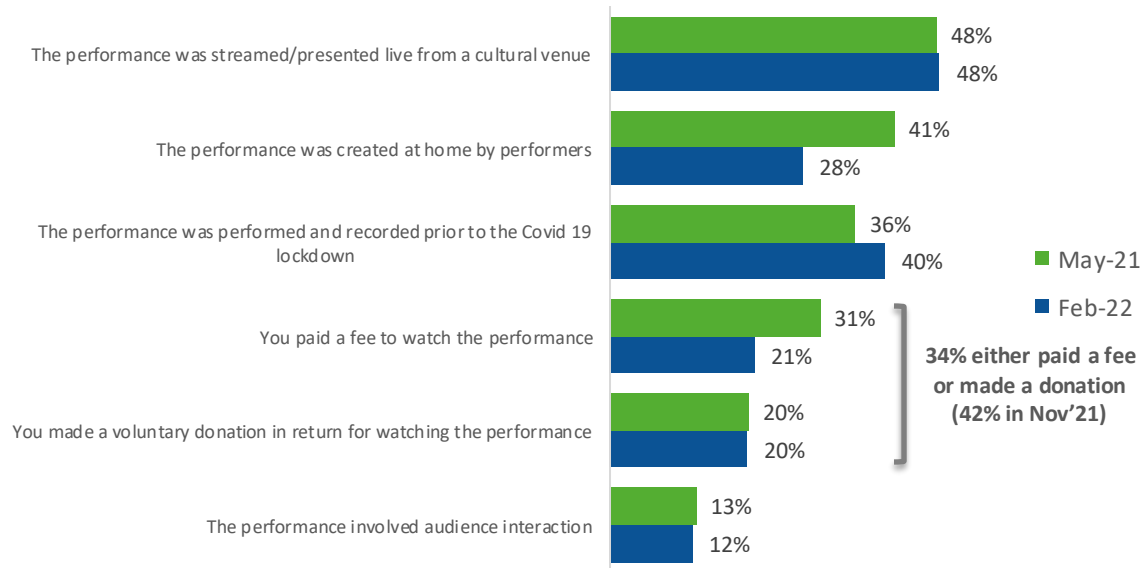


7) During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,105

# A range of types of online performances were watched during the last 6 months. Compared to 2020/21 fewer paid or made a donation

- The 11% of the population who watched online performances at home in the last 6 months (a reduction from 18% between March 2020 and May 2021) were asked to provide further details.
- Around half indicated that the performance was streamed or presented live from a cultural venue (48%) while 40% stated it was performed and recorded prior to the pandemic.
- Overall 34% either paid or made a donation to watch the performance.
- Compared with the March 2020 to May 2021 period a lower percentage watched performances created at home by performers and fewer paid or made a donation.

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 = 142

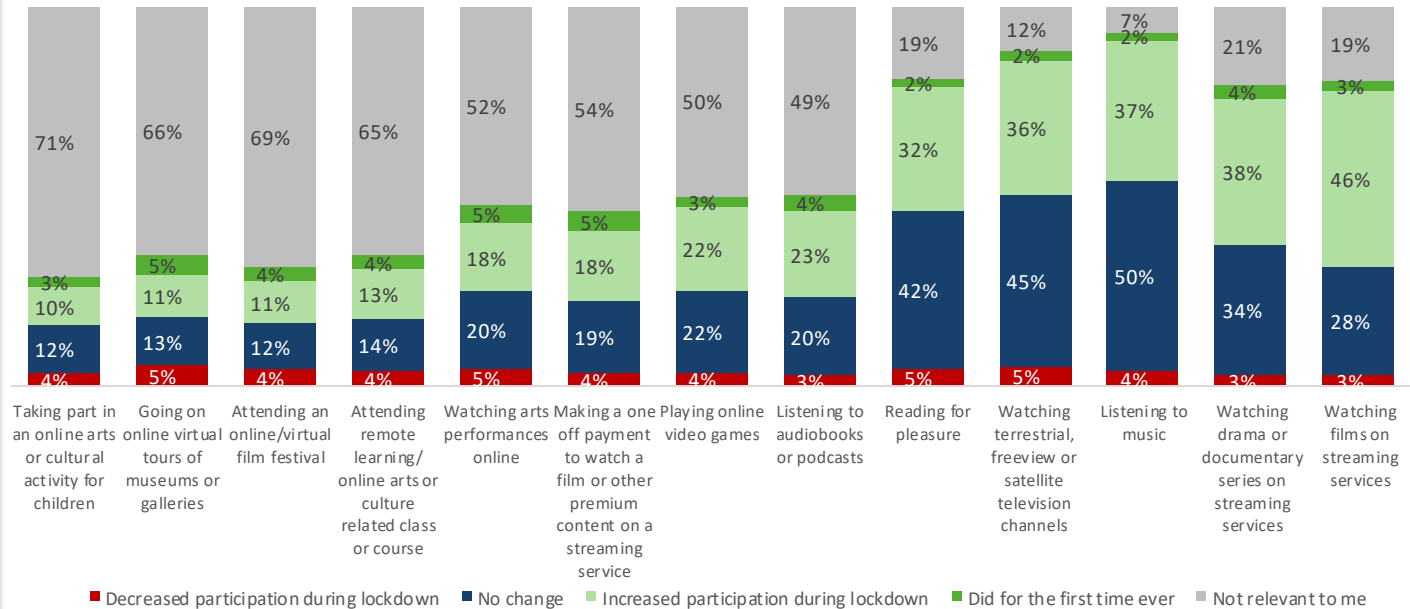


# During the last 6 months most of the population continue to report increased participation in certain at home cultural activities than pre-pandemic

As shown in Figure 7, survey respondents were asked to indicate whether they felt that their participation in at home cultural activities during the last 6 months 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, a round a third or more 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) To what extent, if any, has the amount that you have undertaken each these activities during the last 6 months increased or decreased compared with the 6 months before the first Covid 19 lockdown in March 2020? Base, all respondents = 1,105

# Compared to pre-pandemic levels, participation levels are reported as most increased for watching streaming services and listening to audiobooks and podcasts

**Figure 8 – How participation levels have changed during last 6 months compared to pre-pandemic net change excluding those stating activities were ‘not relevant’**

			NET CHANGE	
			Feb'22	May'21
Watching films on streaming services	-4%	61%	+57	+61
Watching drama or documentary series on streaming services	-4%	53%	+49	+55
Listening to audiobooks or podcasts	-6%	54%	+48	+45
Making a one off payment to watch a film or other premium content on a streaming service	-8%	51%	+43	+40
Playing online video games	-7%	50%	+42	+45
Watching arts performances online	-10%	48%	+38	+41
Listening to music	-4%	42%	+38	+40
Reading for pleasure	-6%	43%	+37	+40
Watching terrestrial, freeview or satellite television channels	-6%	43%	+37	+42
Attending remote learning/ online arts or culture related class or course	-11%	48%	+37	+34
Attending an online/virtual film festival	-14%	47%	+33	+31
Taking part in an online arts or cultural activity for children	-12%	45%	+32	+31
Going on online virtual tours of museums or galleries	-15%	47%	+32	+31

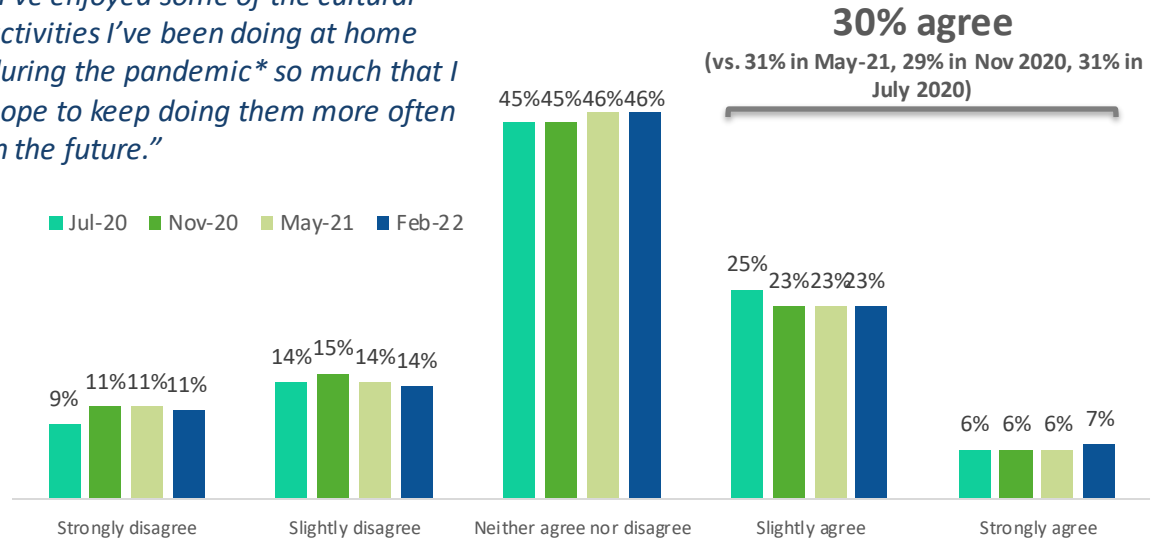
- Figure 8 summarises changing levels of participation in at home activities, comparing the percentage who increased participation with the percentage decreasing participation to obtain an estimate of the net change.
- This comparison further illustrates the scale of increased participation in all of the activities asked about during the pandemic, particularly watching streamed television, listening to audio books, podcasts and music and playing video games.
- Notably the net changes recorded for the 6 months prior to February 2022 are broadly similar to those recorded during May 2021 for the period since the first lockdown. This suggests that some of the changes in in-home behaviours caused by the pandemic have become longer lasting habits even as venues and events have reopened.

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

- As shown in Figure 9, in February 2022 30% 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 and 2021 survey waves.
- People aged 16-34, people with children at home and members of the BAME population were more likely to agree with this statement (46%, 38% and 48% respectively).

Figure 9 – Changing attitudes to cultural events and activities during the pandemic

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



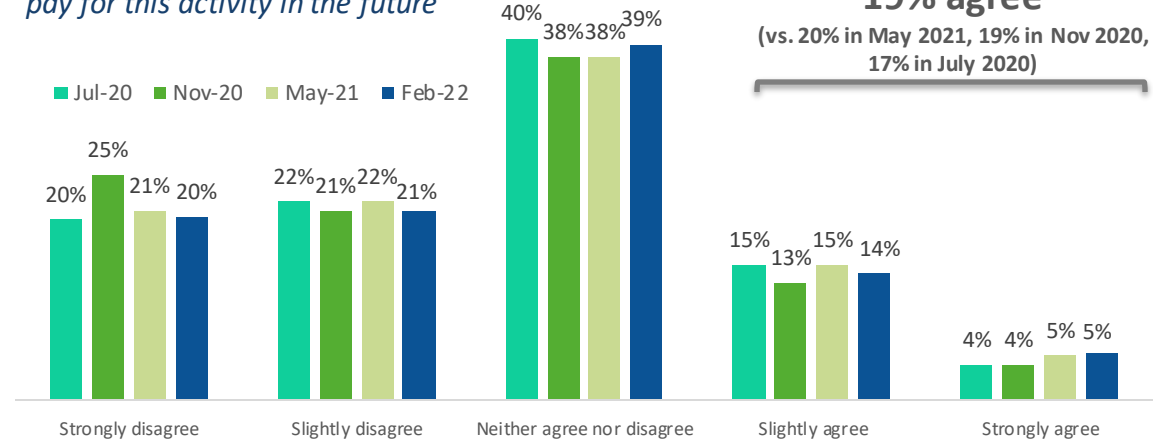
9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,105 \*Worded 'during lockdown' in waves 1 to 3

# 1 in 5 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 February 2022 survey wave 19% of the population agreed that they would pay to access cultural activity online in the future while 41% disagreed with this statement (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 paid for online content.
- However levels of agreement were higher amongst the BAME population (38%), people aged 16-34 (33%) and people with children at home (29%).

Figure 10 – Changing attitudes to cultural events and activities during lockdown

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



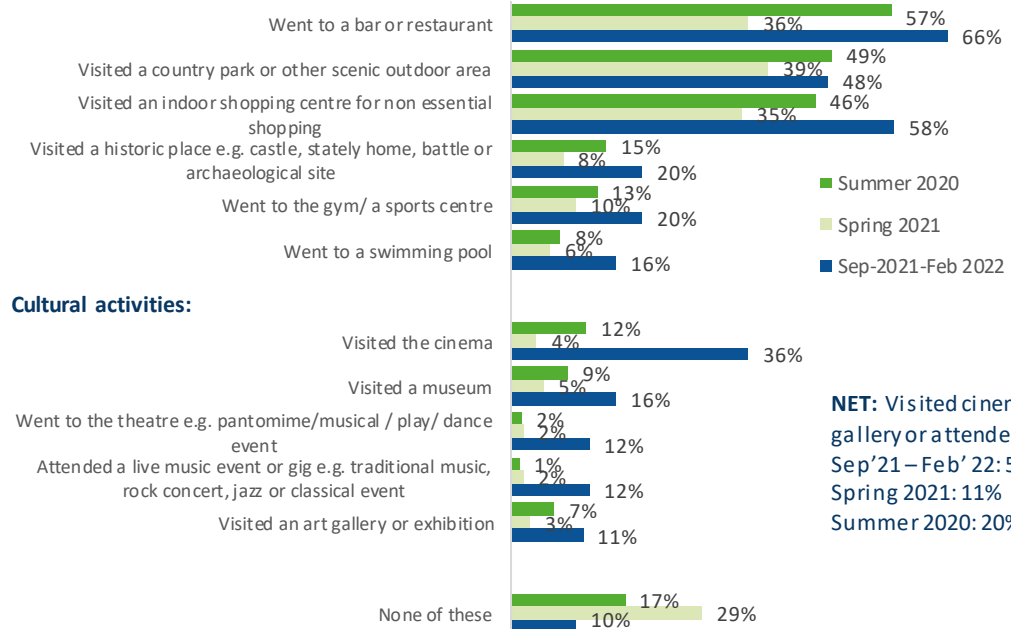
9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,071



# Half of the population took part in an 'out of home' cultural activity during the last 6 months with much higher levels of participation than during the initial post lockdown periods in 2020 and 2021

- 52% of the population had undertaken one or more of the cultural activities listed in Figure 11 in Scotland during the last 6 months and large percentages had also undertaken other leisure activities such as visiting bars and restaurants or indoor shopping centres.
- Overall just over a third had visited a cinema but this percentage increased to 48% amongst people aged 18 to 34 (vs 25% aged 55+) and 46% amongst people with children.
- Unsurprisingly given the changes in restrictions over the period, all of the levels recorded were higher than when the same question was asked during spring 2021 and summer 2020.

Figure 11 – Activities done in Scotland during last 6 months compared with spring 2021 and summer 2020



**NET:** Visited cinema, museum, gallery or attended performance.  
 Sep'21 – Feb' 22: 52%  
 Spring 2021: 11%  
 Summer 2020: 20%

10b) Which of the following activities, if any, have you done in Scotland during the last 6 months? Base, all respondents = 1,105

# In general experiences of attending cultural activities have improved in particular in relation to theatre, museums and galleries

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	Sep'21 – Feb'22	44%	41%	13%	1%	0%	396
	Spring 2021	46%	39%	7%	6%	2%	129
	Summer 2020	22%	47%	18%	10%	3%	45
Attending a live music event	Sep'21 – Feb'22	44%	44%	11%	2%	0%	129
	Spring 2021	39%	52%	-	9%	-	16
	Summer 2020	31%	20%	28%	15%	6%	23
Going to a theatre	Sep'21 – Feb'22	52%	35%	13%	0%	0%	136
	Spring 2021	16%	32%	33%	16%	2%	21
	Summer 2020	34%	48%	12%	-	6%	21
Visiting a museum	Sep'21 – Feb'22	42%	44%	12%	2%	0%	179
	Spring 2021	29%	53%	11%	4%	3%	90
	Summer 2020	33%	51%	7%	9%	-	55
Visiting art gallery or exhibition	Sep'21 – Feb'22	41%	45%	12%	1%	0%	121
	Spring 2021	39%	47%	11%	2%	2%	75
	Summer 2020	40%	37%	10%	11%	2%	38

As shown in Figure 12 those people who had attended cultural activities during the last 6 months were asked to rate their experiences. A similar question was asked in relation to experiences in initial post lockdown periods in summer 2020 and spring 2021 (note small sample sizes).

While responses continued to be varied with only a round half or less providing the top rating of 'very good' for any of the activities, in general ratings were improved on those recorded in 2020 and 2021, in particular for going to the theatre, visiting a museum and visiting an art gallery or exhibition.

# Experiences of cultural activities attended have been varied

- When asked to comment further on their experiences, while many respondents stated that they enjoyed the experience and some praised the measures in place to stop Covid-19 spread, others commented that measures such as mask wearing had a negative impact on the quality of their experience. Some of the responses provided are shown below.

*"Well spaced out and good hygiene."*

*"they could of provided better customer service and this excuse of being poor service etc because of covid is starting to be a bit of an excuse now"*

*"it's was very safe and had all the correct restrictions in places"*

*"The wearing of face masks is not fun and there is a misunderstanding among venue staff of what the rules are."*

*"I really enjoyed myself a lot doing it and it was really good to have normalcy again and it was so much fun"*

*"I was a little stressed as was still worried about covid and there were new rules in place for at the cinema."*

*"I liked going back to the cinema but wearing a mask was unpleasant."*

*"An art exhibition on wild birds. The artworks were fantastic the gallery could have had better ventilation. Masks were worn throughout the visit which was not very busy."*

*"I visited museums and they were pretty much the same as before the pandemic, with a few social distancing measures added."*

*"It was just annoying that we had to wear our masks- it's hot in the theatre anyway so I get even warmer with my mask on."*

# Desires and plans to attend in future



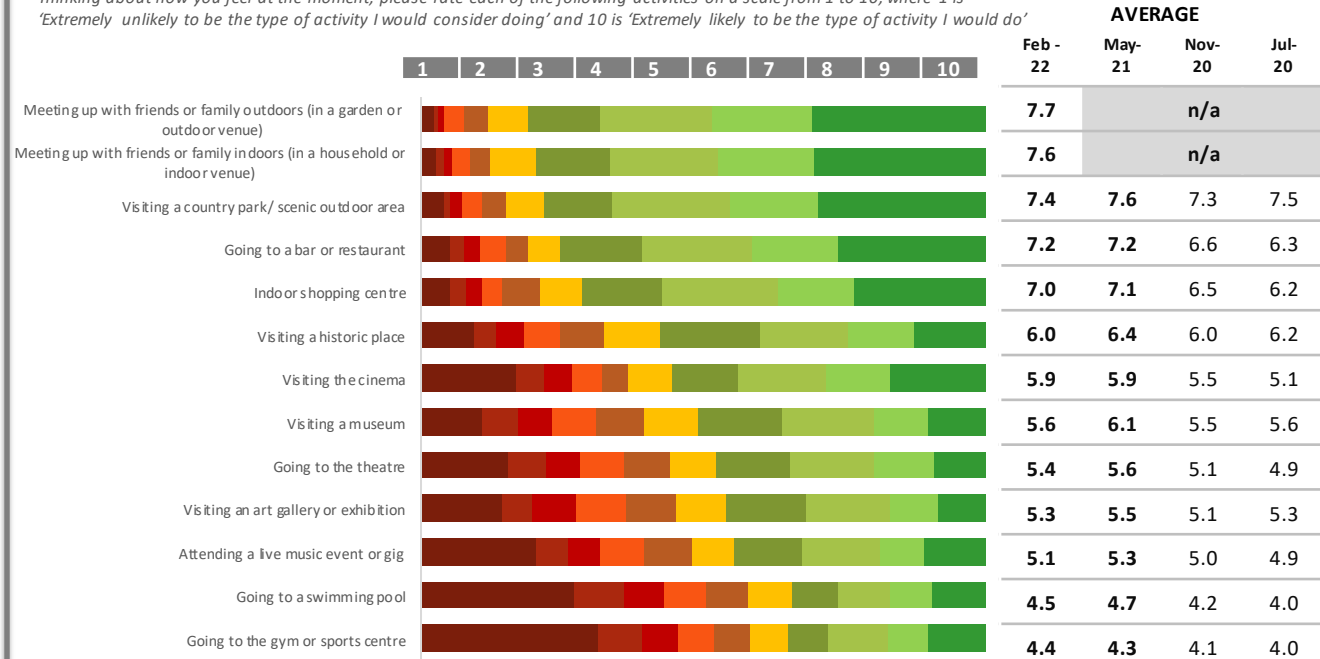


# Levels of desire to attend arts and cultural venues are at similar levels to those recorded in 2021

- 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 February 2022 were in a similar order to those also recorded in the 2020 and 2021 survey waves with the desire to visit country parks and other outdoor areas highest, followed by going to a bar or restaurant and non-essential shops.
- Also high levels of desire were recorded for meeting family and friends either indoors or outdoors (not asked previously).
- Focusing on the cultural activities listed, desire to visit the cinema ranked highest overall.

**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'

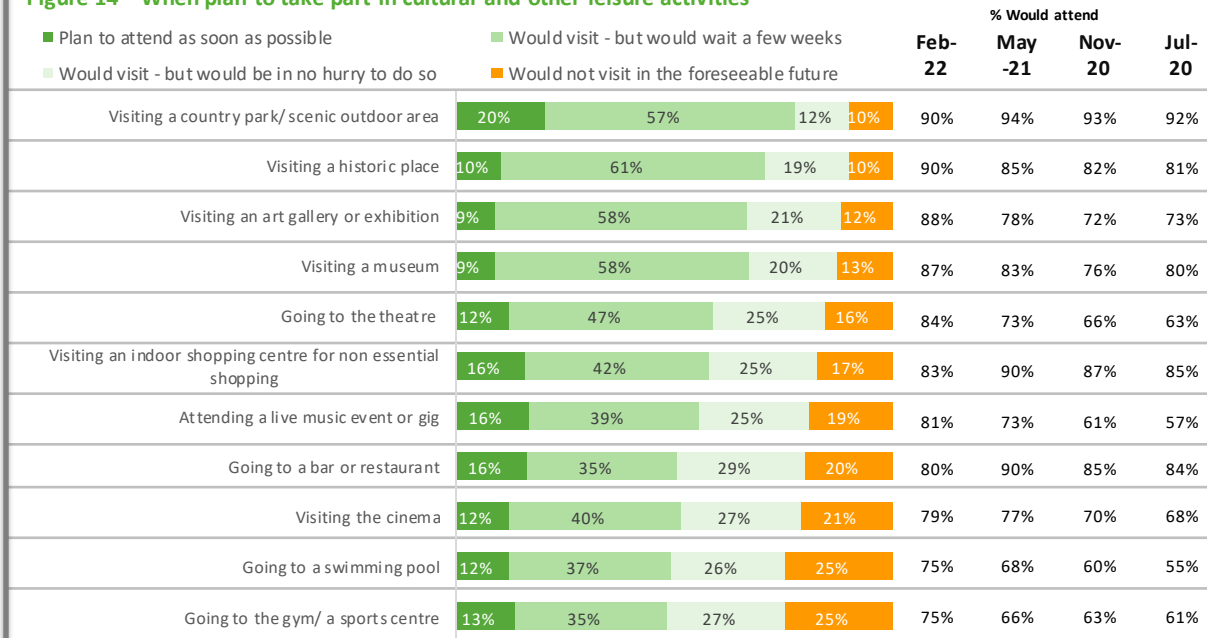


Base, all respondents = 1,105

# An increasing percentage of the population are ready to attend arts and cultural events and venues

- As ked 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).
- Over four in five would attend art galleries, museums, theatre and live music, increased percentages from those recorded in the previous 2021 and 2021 survey waves.

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

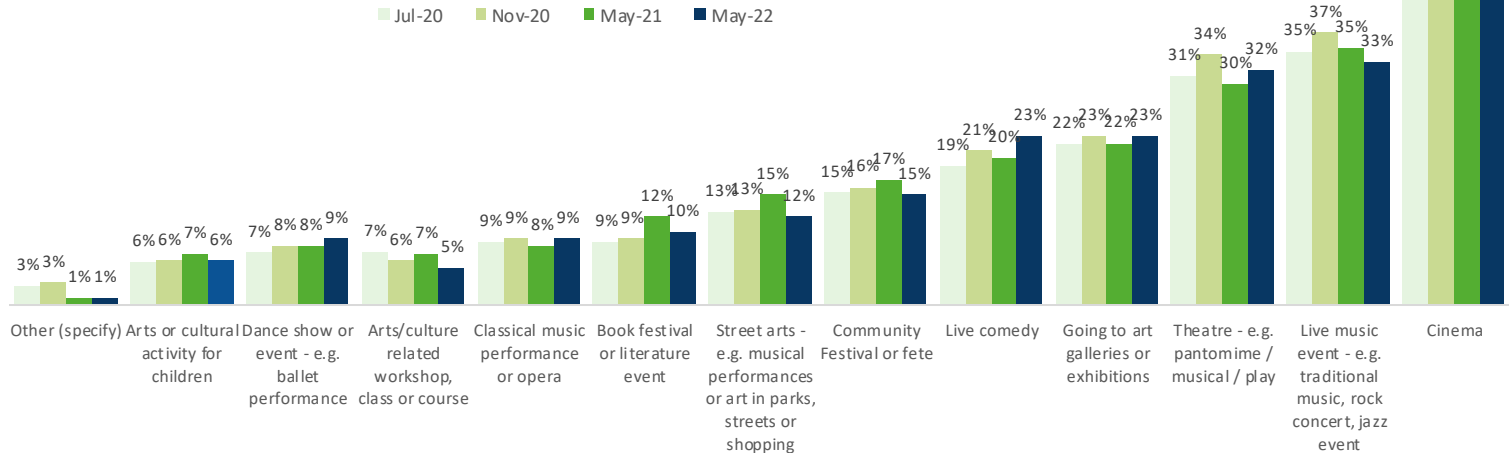


Q11 Which if any of the following best describes your feelings about attending each of these places during the next 6 months? (in previous waves stated "when lockdown rules allow" (excludes Don't Know and Not applicable responses for each activity). Base: all respondents = 1,105

# Audiences most look forward to attending 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 in the future.
- At the overall population level the results in all of the survey waves were fairly consistent. Half of the population (50%) most looked forward to attending the cinema while a third most looked forward to returning to live music (33%).



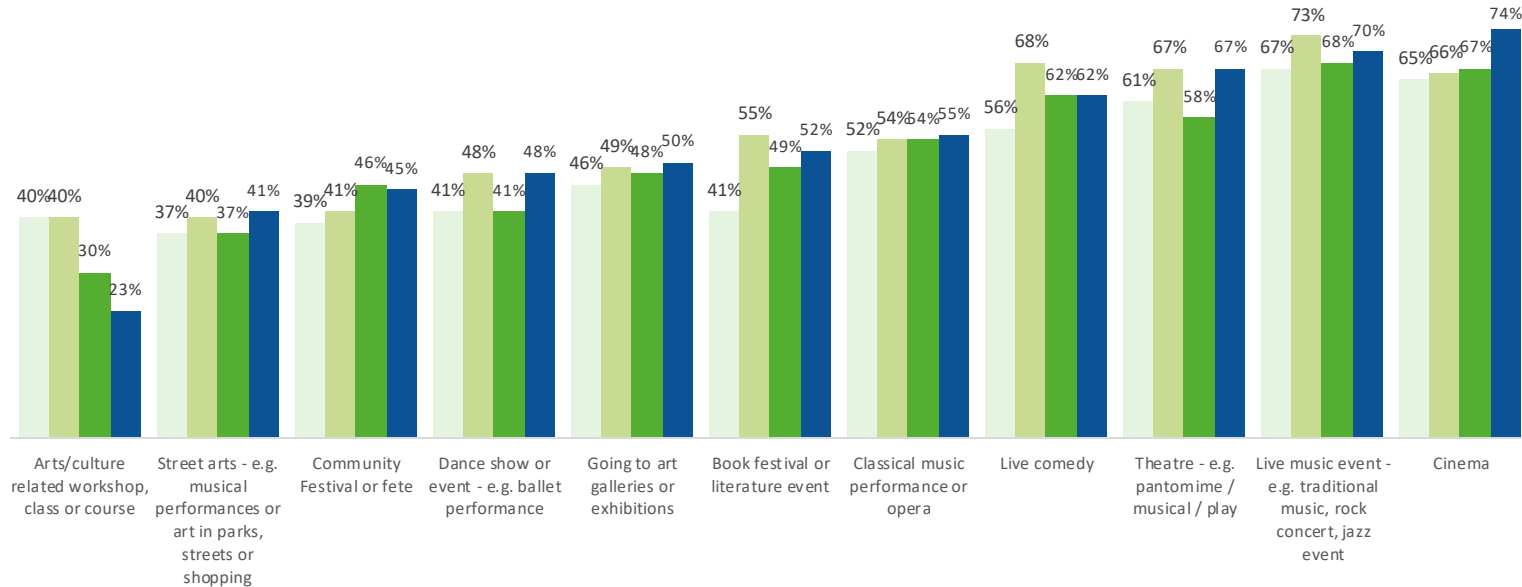
Q12 Thinking in more detail about specific arts and cultural activities, which of the following, if any, do you most look forward to attending in the future?. Base: all respondents = 1,105

# Those who attended events in the year before the pandemic are particularly likely to want to return to cinema, live music, theatre 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 February 2022 the highest levels of interest amongst previous attendees were recorded in relation to attending cinema (74%), live music (70%), theatre (67%) and live comedy (62%).



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?

# However levels of demand for a number of arts event remain suppressed compared to pre-pandemic

- Respondents were asked how, if at all, their consideration for different cultural activities and events had changed compared to prior to the pandemic 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 each of the survey waves (% more likely minus % less likely).
- Demand for a number of the activities asked about remains lower than before COVID 19, most notably theatre, activities for children dance and classical music performances,
- Comparing the net results with those obtained in the 2020 and 2021 survey waves suggest that while the picture is currently less negative than in 2020, it remains similar to May 2021.

Figure 17 – How preferences have changed as a result of the pandemic

			NET CHANGE			
	Less likely to consider	More likely to consider	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 an arts or culture related class or course	-23%	15%	-8	-3	-16	-19
Book festival or literature event	-24%	16%	-8	-5	-18	-26
Theatre e.g. pantomime/musical / play	-23%	13%	-10	-6	-25	-26
Arts or cultural activity for children	-23%	12%	-11	-7	-19	-20
Dance show/ event e.g. ballet performance	-24%	11%	-12	-10	-24	-24
Classical music performance or opera	-24%	11%	-13	-11	-24	-23

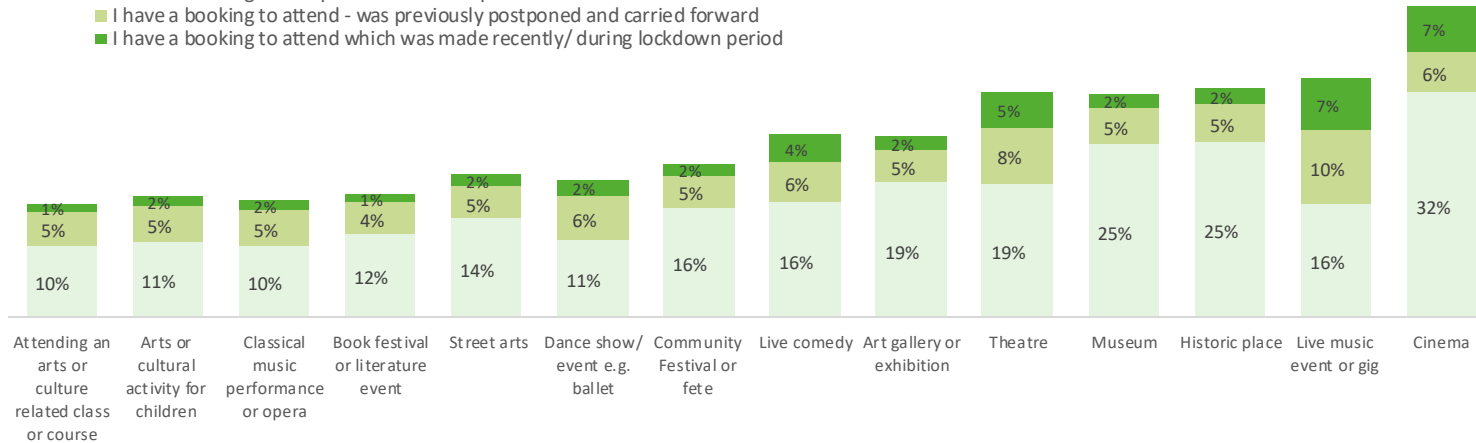
Q13A Please indicate the extent to which your preferences have changed (if at all) compared with what you might have chosen to do before the COVID-19 pandemic (NET changes in consideration, excluding those who would not consider in any case). Base: all respondents = 1,105

# Over two fifths of the population are booked or planning to attend the cinema and a third are booked or 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 (44%), a slight increase on the level recorded in May 2021 (38%).
- Live music was the activity which people were most likely to have a booking for (17% overall) – most often for a rescheduled event.

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

■ I am considering and hope to make firmer plans soon  
■ I have a booking to attend - was previously postponed and carried forward  
■ I have a booking to attend which was made recently/ during lockdown period



**Total booked or considering:**

Activity	Feb-22	May-21
Attending an arts or culture related class or course	16%	15%
Arts or cultural activity for children	17%	15%
Classical music performance or opera	17%	16%
Book festival or literature event	18%	17%
Street arts	20%	21%
Dance show/ event e.g. ballet	20%	21%
Community Festival or fete	22%	22%
Live comedy	26%	22%
Art gallery or exhibition	26%	23%
Theatre	32%	26%
Museum	32%	30%
Historic place	32%	32%
Live music event or gig	34%	33%
Cinema	44%	38%

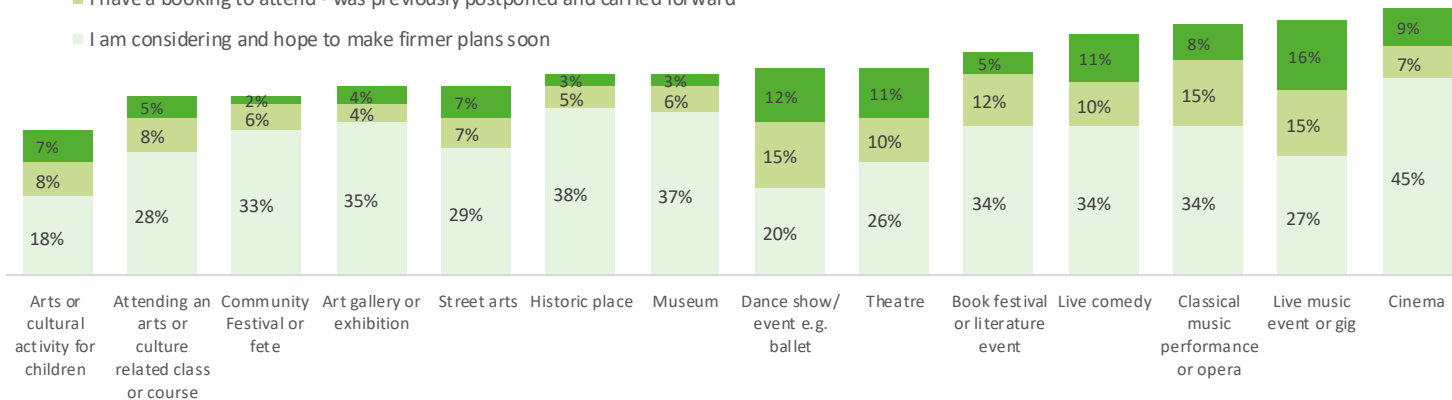
NEW2) Do you have any bookings or plans to attend any of the types of arts and cultural activities you stated that you would consider doing in future? For each activity select the answer option which applies to you



# Over half of those who attended cinema, live music, classical music or live comedy pre-pandemic are planning to attend again soon

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

- I have a booking to attend which was made recently/ during lockdown period
- I have a booking to attend - was previously postponed and carried forward
- I am considering and hope to make firmer plans soon



**Total booked or considering:**

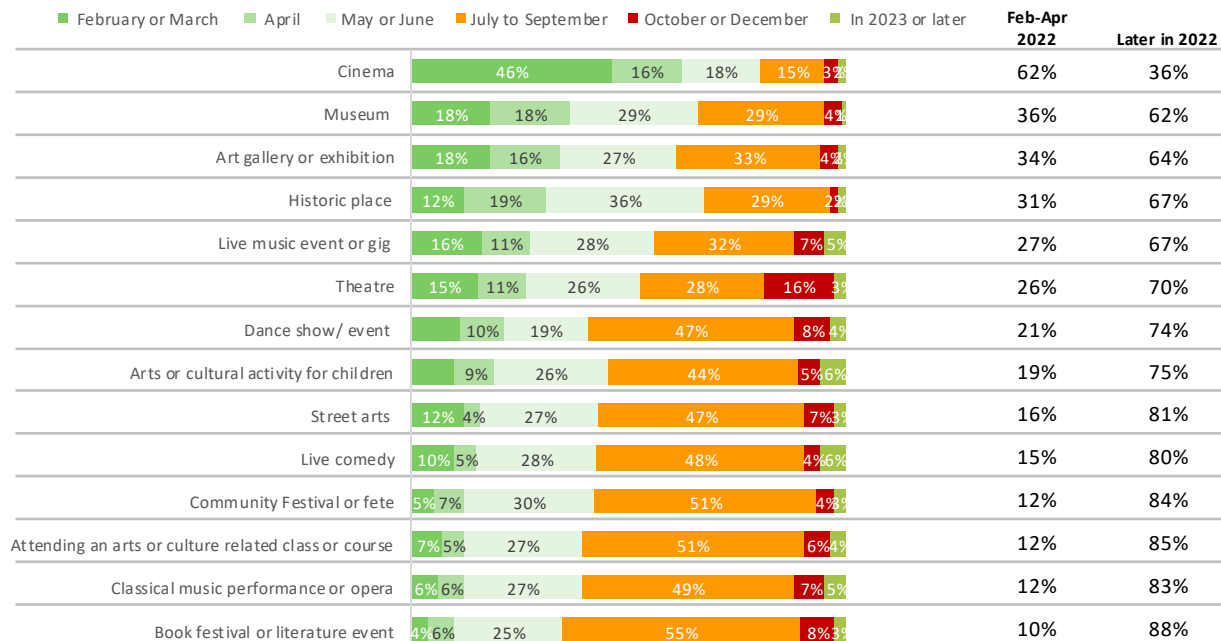
<b>Feb-22</b>	33%	41%	41%	43%	43%	46%	46%	47%	47%	51%	55%	57%	58%	61%
<b>May-21</b>	31%	47%	37%	37%	43%	43%	42%	34%	40%	44%	52%	41%	53%	50%

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 the cinema expect to go in the next two or three months, most expect to attend other activities during the summer

- Those respondents who had booked or were planning to attend events or activities were asked when they expected to attend. Figure 20 summarises the responses for each activity, excluding those stating that they didn't know when they would go.
- 62% expected to attend the cinema within the next 2 or 3 months (i.e. in February, March or April 2022) while a round a third each expected to attend museums or art galleries within this time period.
- In contrast, plans to attend live comedy, community events, art classes classical music performances or literature events were likely to be further into the future.

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



NEW3) When do you expect to attend this art or 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.

# Almost 1 in 3 had to change plans to attend events or venues due to Omicron

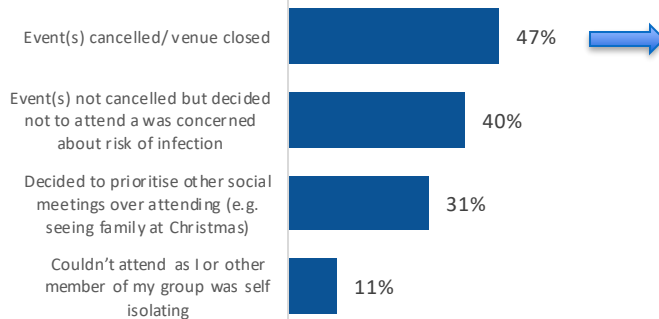
- Almost a third of the population changed plans to attend arts or cultural events because of the rising cases of Omicron and new restriction and closures implemented as a result (31%).

- As shown in Figure 21, in almost half of cases the event was cancelled and, in around half of these situations a refund was obtained for all tickets/events.
- However others changed plans due to a personal decision to prioritise other social meetings or because they were required to self isolate.

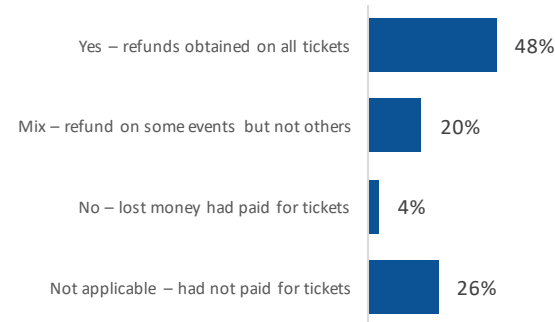
Figure 21 – Impacts of Omicron strain

**31%** of population changed plans to attend arts or cultural events because of rising cases and/or new restrictions

### Reasons for changing plans:



### Whether refunds obtained when events were cancelled



NEW22A) Did you personally change any of your plans for attending any arts or cultural activities during December, January or February because of the rising cases and/or new restrictions (e.g. attending theatre, cinema, gigs, museums or other events or venues). N=1,105

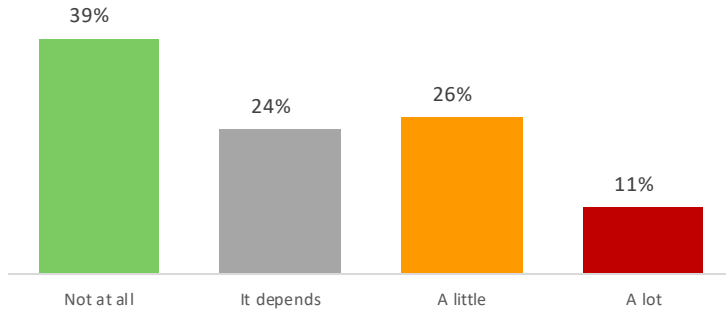
NEW22B) Which of the following best describes why you changed your plans to go to an arts/cultural event or venue? N=351

NEW22B) You stated that you couldn't attend one or more arts or cultural event(s) as it was cancelled or the venue was closed. Did you get a refund on any tickets you had purchased?

# While over a third consider the time of year when deciding whether to attend events this primarily due to weather related concerns

- While over a third (37%) indicate that the time of year has some impact on their likelihood to book tickets to attend a cultural event ('a little' or 'a lot') when asked why the weather or the timing of events (e.g. Edinburgh Festivals) were the main reasons.
- 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.

Figure 22 – Impacts of time of year on likelihood to book tickets to attend arts or cultural event



NEW22G) To what extent, if any, does the time of year an arts or cultural event is taking place impact upon your likelihood to book tickets to attend?



*"If it is the winter the weather might be really bad and I could not be bothered sitting in the audience having been out in the rain or snow. Or trying to get home in bad weather late at night."*

*"Autumn and winter would be too cold and wet to attend."*

*"I have less time off during summer than in winter to attend things."*

*"If coronavirus is at a highly infectious rate and if the weather is affecting our journey."*

*"Depends when tickets get released. If October - January such a tight financial period with Xmas so yeah that would impact."*

*"Edinburgh has loads of festive performances etc in august so likely to go then."*

*"Weather. I don't want to be hanging about in queues in the freezing cold."*

*"In good weather (summer) there are lots of activities to attend because this is when people want to be out and about. In the rainy winter months people want to stay at home."*

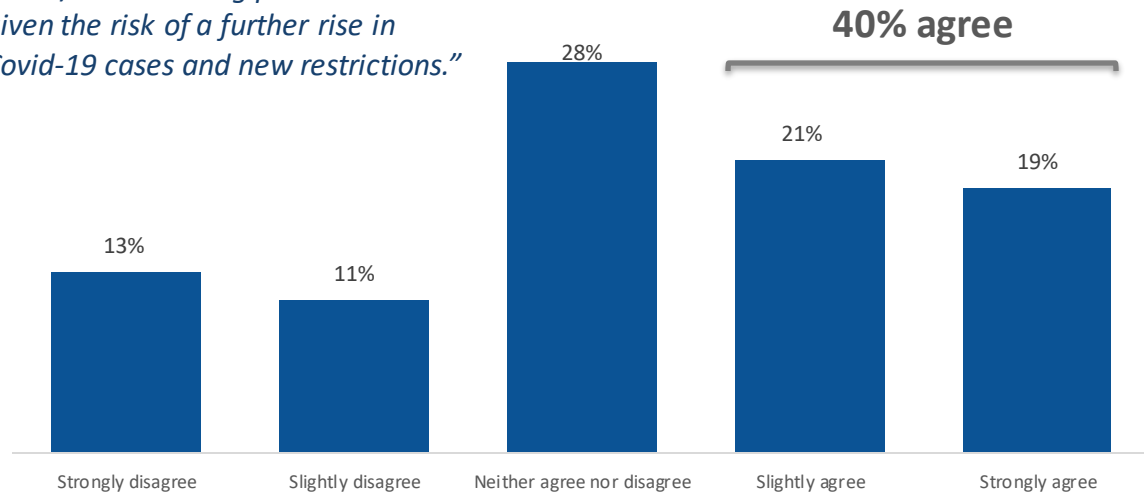
# When prompted 2 in 5 agree that they may avoid booking to attend events in winter given the risk of increasing Covid 19 cases and new restrictions

- When prompted with the statement shown in Figure 23, two in five agree to some extent that they would avoid booking to attend any shows or events taking place in winter given the risk of a further rise in cases or new restrictions (40%).

- Groups more likely to agree with this statement included those with a long term illness or disability (47% compared with 37% amongst rest of population) and members of the BAME population (58% compared with 39% of rest of population).

Figure 23 – Attitudes toward booking events to attend in winter

*“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.”*



NEW22L) Still thinking about the time of year when you might attend an arts or cultural event, to what extent if any do you agree with the following statement:

# Understanding changing attitudes to attendance



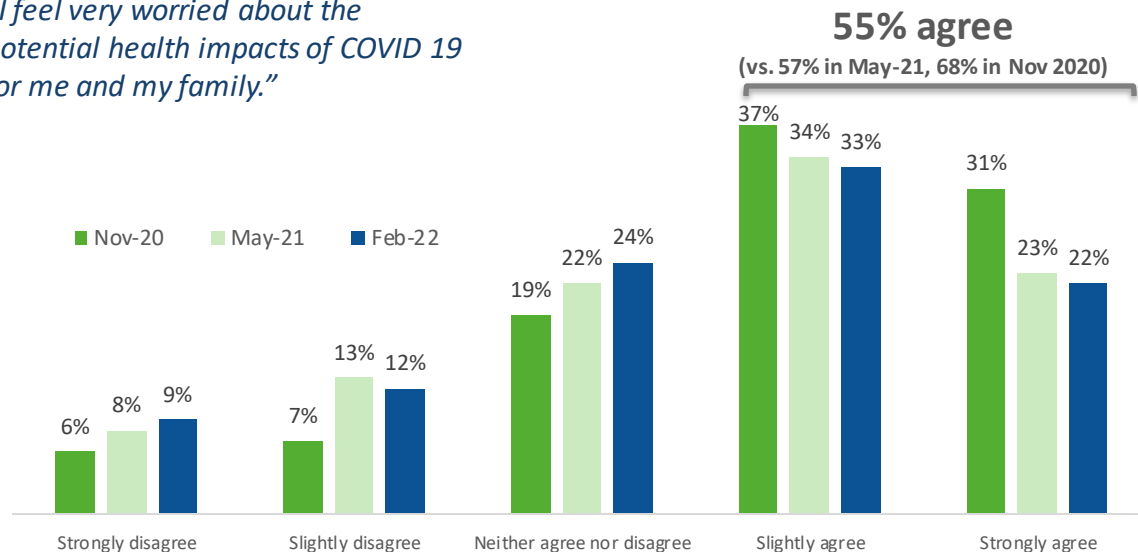


# Just over half of the population remain worried about the potential health impacts of Covid-19

- 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 impacts of the pandemic.
- 55% of the population agreed strongly or slightly that they are feeling very worried about the potential health impacts, a similar percentage to May 2021 (57%) but much lower than recorded in November 2020 (68%).
- In February 2022 this concern was greater amongst people aged 65+ (61% vs 51% aged under 35) and people with a long term illness or disability (70%).

Figure 24 – Feelings regarding the impacts of Covid-19

*“I feel very worried about the potential health impacts of COVID 19 for me and my family.”*



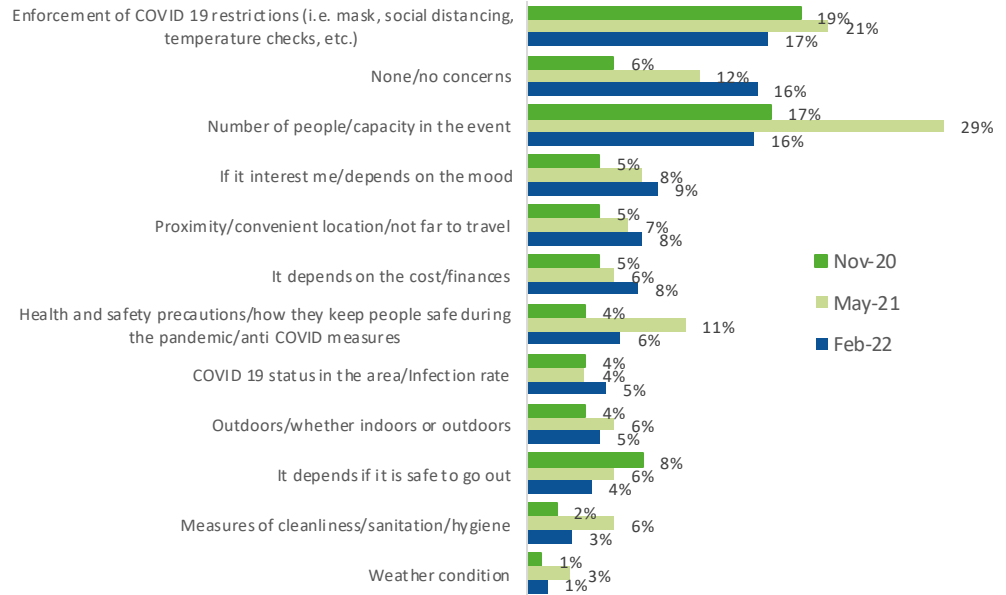
Q18 Please indicate if you personally agree or disagree with the following statements.. Base:all respondents = 1,105

# Enforcement of controls on numbers of people and Covid 19 restrictions at venues continue to be important for some people while an increasing proportion state that they have no concerns

- 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 25).
- In February 2022 the most frequently provided responses related to the enforcement of Covid 19 restrictions (17% decreased from 21% in May 2021).
- Also 16% provided responses relating to controls on the numbers of people/capacity at events and venues (16% decreased from 29% in May 2021).
- However 16% indicated that nothing was important when they were deciding on whether to attend arts and cultural activities, an increase from the levels recorded in the 2020 and 2021 survey waves. Also slightly increased percentages of respondents provided responses relating to aspects other than Covid-19 such as location and cost.

**Figure 25 – 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.*

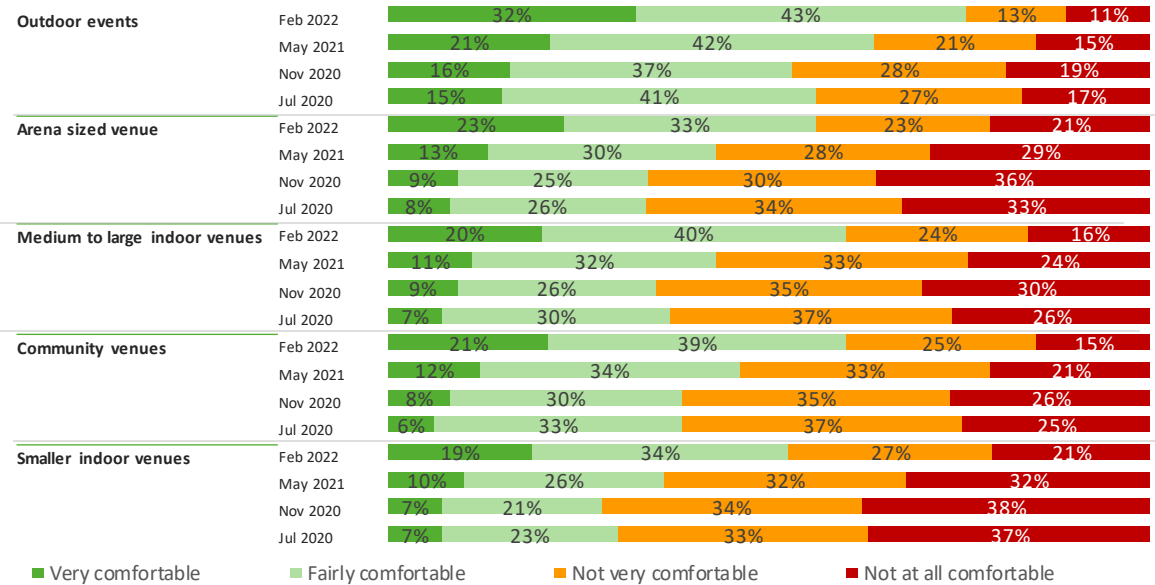


Base: all respondents = 1,105

# A much increased percentage 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*
- Notably, the proportions who stated that they would feel comfortable with any of the venue types was somewhat higher in February 2022 than in any of the previous survey waves.
- As in previous waves levels of comfort were highest for outdoor events and events held in arena sized venues.

Figure 26 – Level of comfort going to different types of venue to watch performances in future

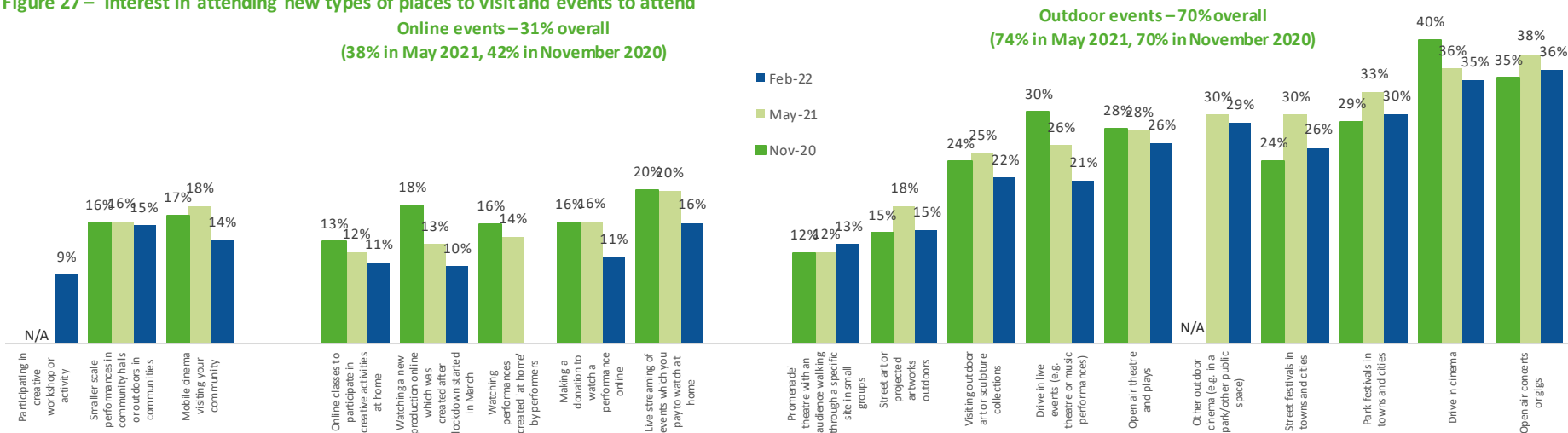


Q15 Thinking more specifically about the types of place that arts and cultural activities could take place in, how do you feel about going to the following types of place to watch performances in the near future? Base: all respondents = 1,105

# 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 restrictions which have been in place at points during the pandemic, respondents were asked which of the list of types of event shown on Figure 26 were of interest. Similar to previous waves, the largest percentages indicated that outdoor events were of interest but a decreased percentage were interested in online events.

**Figure 27 – Interest in attending new types of places to visit and events to attend**  
**Online events – 31% overall**  
**(38% in May 2021, 42% in November 2020)**

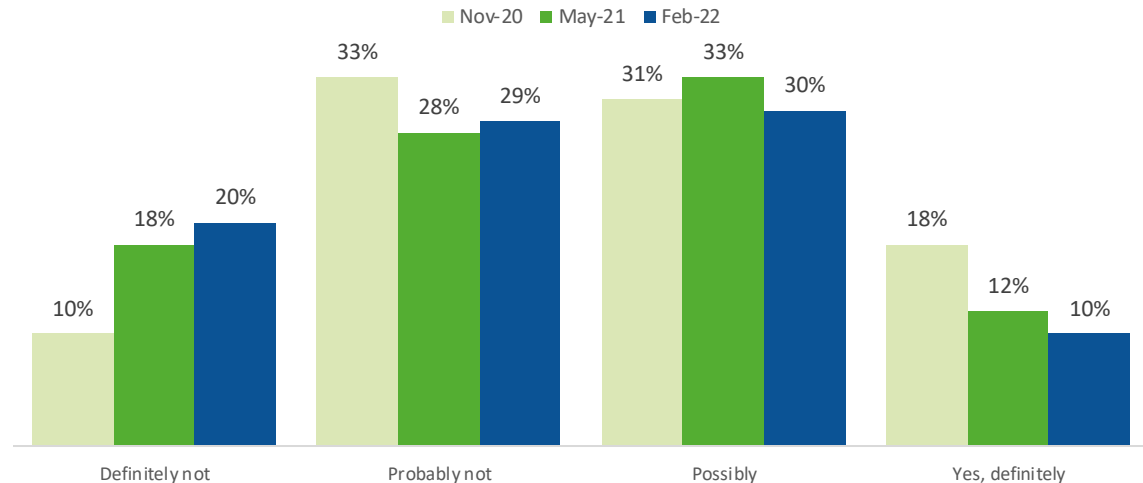


Q17 Given the restrictions placed on arts venues and performers at times during the last two years, a number of ideas have been proposed for new types of places to visit and events to attend. Which of the following would you be most interested in attending if offered in they were available to you? Base: all respondents = 1,105

# 1 in 10 would definitely be interested in engaging in cultural events online in future

- 10% of the population would definitely be interested in engaging with online cultural events in future, similar to the 12% recorded in May 2021 but a decrease from 18% recorded in November 2020. A further third (30%) stated that they would possibly be interested, a slight decrease from 33% in May 2021.
- Groups most likely to state that they would definitely be interested included those aged under 35 (18% vs 11% aged 35-54 and 4% aged 55+) and members of the BAME population (17%).

Figure 28 – Interest in engaging with cultural events online

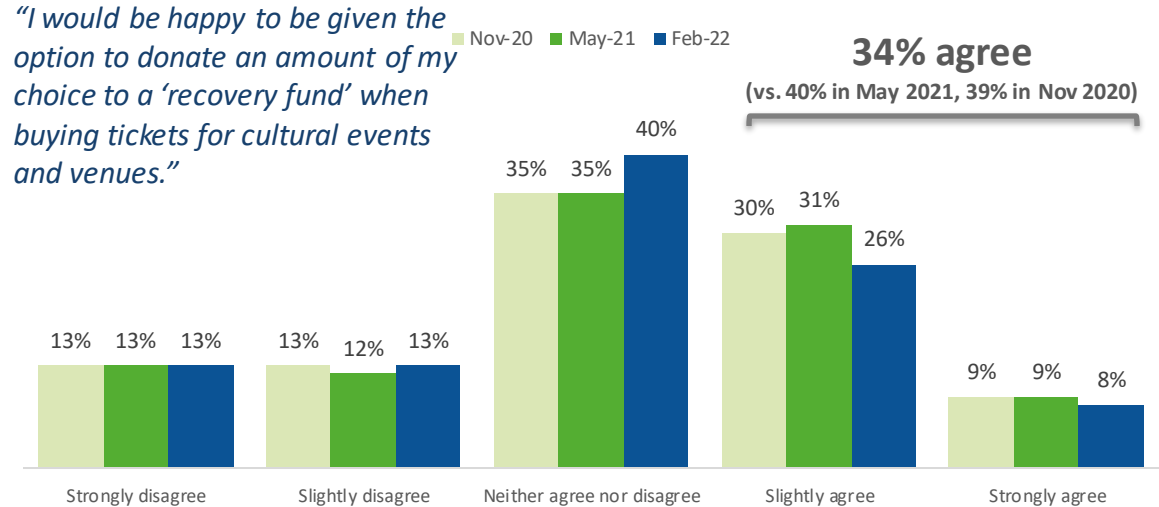


Q15D Whilst in person/ live cultural events are taking place again now, some venues and performers have plans to also continue to offer content online, continuing some of the virtual events which have been successful during the lockdown periods or making these into 'hybrid' events with a mix of online and in person content. Looking to the future, would you be interested in engaging with these types of cultural events online? Base: all respondents = 1,105

# A third would be happy to be given the option to donate to a recovery fund when buying tickets for cultural events and venues

- 34% 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 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).

Figure 29 – 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

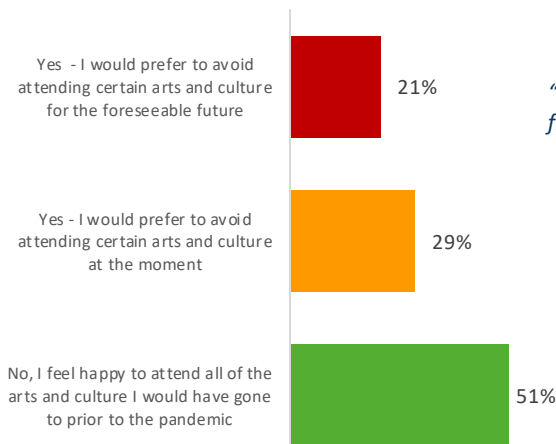


# While half of the population now feel happy to attend all of the arts and culture they would have gone to pre-pandemic, 1 in 5 would prefer to avoid certain events for the foreseeable future

Population groups most likely to state that they would avoid certain arts and culture for the foreseeable future included those aged 70 or over (35%), people with a long term illness or disability (32%) and people who are worried about the potential health impacts of Covid 19 (27%). As shown in the selection of comments, concerns largely related to being in crowded venues, especially indoors.

Figure 30 – Ongoing impact of pandemic on attendance of arts and cultural events

**Are there any arts and cultural activities or types of venues that you would have attended prior to the pandemic that you would prefer not to attend again at the moment or in the future...?**



Are there any arts and cultural activities or types of venues that you would have attended prior to the Covid 19 pandemic that you would prefer not to attend again at the moment/ in the future? (N=1,105)

*"Any arts and cultural events where people congregate in close proximity. I would be happy to attend such events again when I'm satisfied there's no health risk and if I think they will be worth attending."*

*"Nothing specific, wouldn't want to be anywhere too crowded for a while as not everyone is careful. Due to less interaction there's so many illnesses going around."*

*"Anywhere indoors and seated, it would be too uncomfortable no fresh air. I cannot see me attending anywhere like this for several years."*

*"Indoor events are I think still a bit risky. Outdoor, I'd be more comfortable with."*

*"Anything indoors where physical distancing would be compromised because of the numbers of people attending. Also, places with poor natural ventilation."*

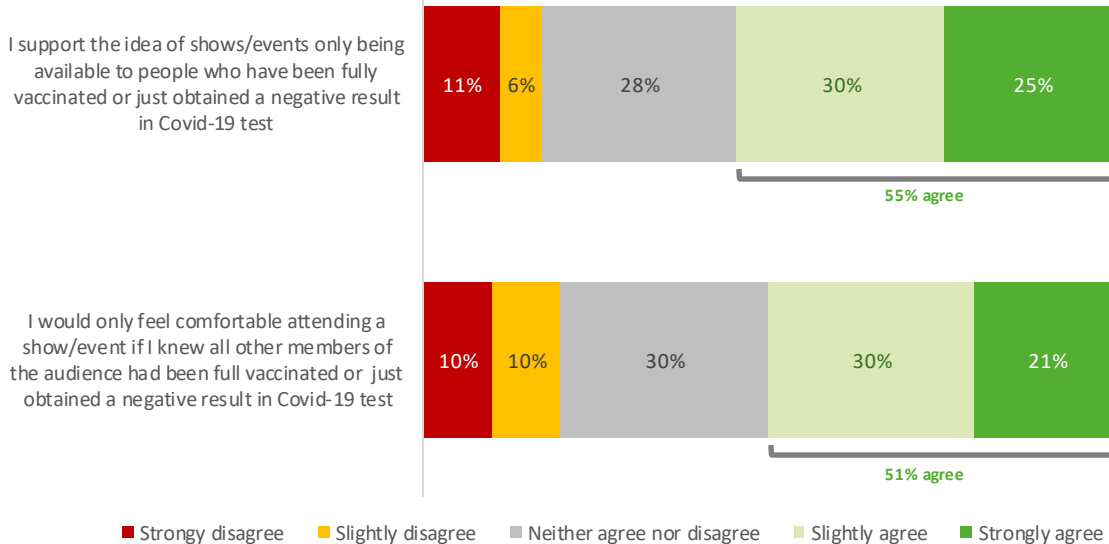
*"Anything that has large crowds in small spaces."*

Please give details on the activities you would prefer not to attend, why this is and when, if ever, you would be happy to attend again

# Just over half of the population support the idea of cultural events only being available to people who have been fully vaccinated or 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 audiences only being allowed to attend cultural shows and events if they have been fully vaccinated or shown a negative test and their levels of comfort related to this.
- 55% agreed that they support the idea of events only being available to people who have been fully vaccinated or just obtained a negative test. People most likely to agree with this statement included those aged 55+ (66% vs 48% aged under 55) and people who have received all of the available vaccinations (61%).
- A slightly lower percentage (51%) agreed that they would only feel comfortable attending a show/event if they knew all other audience members had either been fully vaccinated or just obtained a negative Covid test result.
- In May 2021 similar results to these were obtained to a question relating to audience members showing a recent negative test (56% agreed to first statement, 57% to second).

Figure 31 – Attitudes to Covid-19 testing

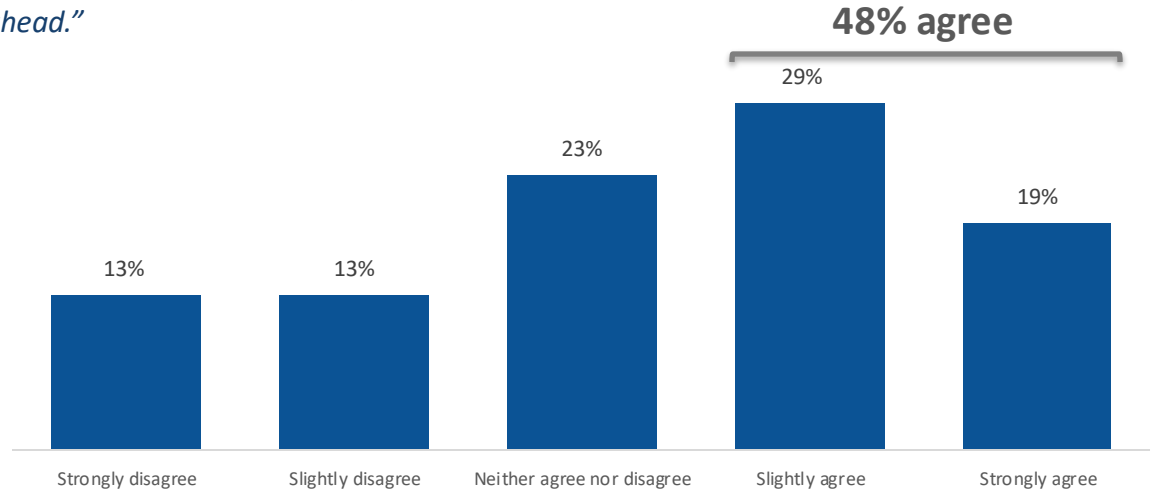


Q18 Still thinking to the future, please indicate if you personally agree or disagree with the following statements Base: all respondents = 1,105

# Half of the population are worried about their household finances in the year ahead

Figure 32 – Attitudes toward household finances for year ahead

*“I’m worried about my own/my household’s finances for the year ahead.”*



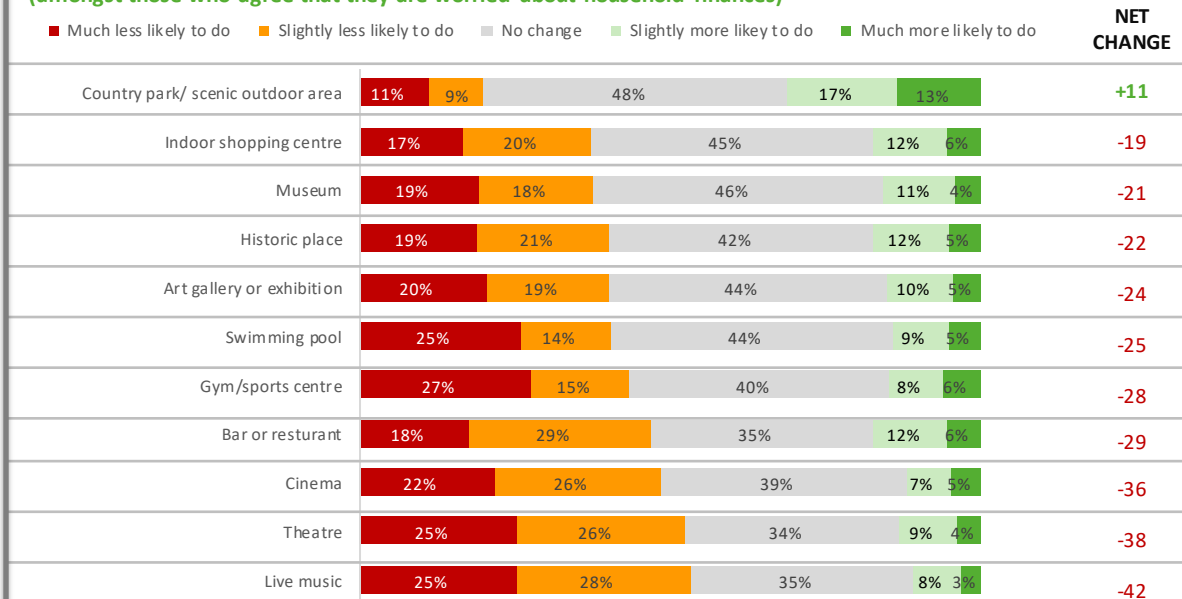
NEW22K) Thinking about your household finances, to what extent do you agree or disagree with the following statement?

- Given the increasing cost of living crisis facing the UK, respondents were asked a short series of questions relating to household finances.
- As shown in Figure 32, a round half of the population agree to some extent that they are worried about their household's finances for the year ahead (48%).
- 19% strongly agree with this statement but this percentage is higher amongst women (23%), people aged 45-54 (28%), C2DEs (24%) and people with a long term illness or disability (30%).
- In contrast 13% strongly disagree with this statement with men (18%), people aged 65+ (23%) and ABC1s (17%) most likely to provide this response.

# Concerns over household finances could have a negative impact on participation in cultural activities, especially cinema, theatre and live music

- The 48% of respondents who agree that they were worried about household finances for the year ahead were shown the list of activities in Figure 33 and asked to what extent, if any, they would be more or less likely to do each given these concerns.
- As shown, while overall an increased percentage may 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 33 – Potential changes in cultural and leisure activities given household finance concerns (amongst those who agree that they are worried about household finances)**



NEW22L) With the rising cost of living in the UK, some households may be changing the items and activities they spend money on in order to save money. Given this situation 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?  
Base: Respondents who agree that they are worried about household finance for year ahead (N=540)



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