Creative Scotland

COVID-19 Population Survey

Wave 5 – April 2023

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, third and fourth wave of the report were undertaken in November 2020, May 2021, and February 2022 to allow for comparison of how attitudes had changed since the summer of 2020. The findings of these first four waves are available on the Creative Scotland website.

This report sets out the findings of the fifth wave of the research, with fieldwork undertaken between the 15th and 27th March 2023, and shifts focus to the impacts of rising costs on life and finances. Much like the previous waves, this report aims to update our understanding of public opinion on attending 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. 1,102 surveys were conducted in the fifth wave, with an accompanying boost of 100 surveys conducted with people of the global majority and/or minority ethnic people/groups to allow for comparative analysis of results for this group.

As noted above, this latest report considers emergent barriers to cultural participation, with a focus on the rising cost of living, that could impact booking patterns and attendance in the future. As the Scottish population begins to adapt to the impacts of rising costs on life and finances, this survey aims to reveal how this will affect the arts and cultural sector. Respondents were asked their opinions about four main topics:

1. Are audiences returning to cultural activity after the disruptive pandemic period of 2020-22?
2. What are the enablers of, and barriers to, cultural attendance?
3. What are the main changes in public patterns of spending and consumption of the arts since the first lockdown period?
4. What differences exist – between art forms, types of activity or locations, and seasonal influences?

This summary report provides the key findings from this fifth wave of research. To access the full report, go to: https://www.creativescotland.com/audience-intentions-wave-5

Introduction

In 2023, while levels of concerns over COVID-19 are much reduced and restrictions have been eased allowing the sector to re-open, a number of factors including rising energy prices have led to significant increases in the costs of living for the Scottish population and the costs of operating businesses in every sector of the economy. This survey research, commissioned by Creative Scotland and undertaken by 56 Degree Insight in March 2023, aims to better understand the Scottish population's attitudes to attending cultural events and venues.

Findings show that participation levels have not yet recovered to pre-pandemic levels, despite the relaxation of restrictions and re-opening of arts and cultural venues. In the context of rising costs, the majority of the population are cutting back on their expenditure on arts and culture, with ticket prices becoming a more important consideration when deciding whether to attend, and half of the population stating they are less likely to attend paid for arts and cultural events. Periods of vulnerability are an ongoing concern for the creative sectors and may require sector wide support, planning and resilience.

66%

Of the population are worried about their household finances in the year ahead.

This survey suggests that cost of living concerns are further influencing public demand, with variances between organisations, art forms and the venues in which work is presented:

Attitudes to culture

- Arts and cultural activities have decreased in importance for over a quarter of the population due to rising cost of living concerns.
- While arts and culture are less important for some because they feel they now have other priorities, they are more important for others who feel they improve their well-being and quality of life.

Impacts of rising costs on life and finances

- Almost a quarter of Scottish adults are struggling financially. Younger people and the least affluent social grades are most impacted.
- Two thirds of the population are worried about their household finances in the year ahead, an increase from 48% a year ago.

Participating at home

- Participation in certain in-home cultural activities has increased since February 2022, in some cases returning to the higher levels recorded during the first lockdown period in 2020.
- During the last 6 months most of the population have listened to music, watched films, drama or documentaries, or read for pleasure while at home.

In-person cultural activity

- Levels of arts and cultural participation out of the home were lower in the last 12 months than in the 12 months prior to the first COVID-19 lockdown.
- In general, the quality of experiences of attending cultural activities have improved since a year ago, in particular for live music and theatre.
- Attending art galleries and museums is often seen as being 'cheap' while cinema, theatre and live music are usually perceived as expensive.
- Considering price and experience together, all of the activities asked about are largely seen as providing quite or very good value for money.

Future outlook on cultural attendance

- Compared to the last 12 months, levels of demand for the next year are varied with an increase in interest in live music and cinema but decreases for some other activities.
- Cost is the most common reason given for being less likely to consider attending (mentioned by over half of respondents who were less likely to attend in future).
- With the exception of art galleries, the proportions booked or planning to attend arts and cultural events is lower than a year ago.

Potential barriers to engagement

- Almost three quarters state that ticket prices have become a more important consideration when deciding whether to attend.
- Increasing costs are impacting on decisions for the majority with around half cutting back on their expenditure on arts and culture.
- When prompted to consider cultural attendance in the context of cost-of-living concerns, over half of the population are less likely to attend paid for arts and cultural events.
- The negative impact of cost-of-living concerns could be most pronounced for theatre, live music, dance and classical music and opera.

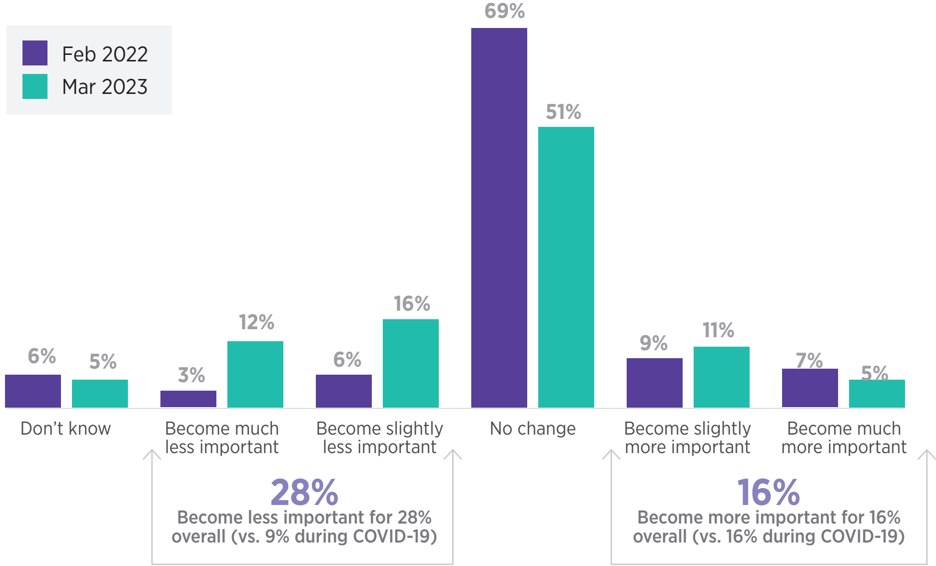
50%

Have cut back on expenditure on arts & culture due to costs.

Attitudes to culture

While just over half of the population reported that the importance of arts and cultural activities had not changed, over a quarter felt they had become less important due to rising cost of living concerns (**Figure 1**). When asked why this was the case, one of the most common reasons given by this group were having more important priorities and essentials to spend money on (45%), in addition to arts and culture being more of a hobby/luxury (40%), and limited budget/no money to spend (38%).

Figure 1: '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 rising costs'



28%

Agree arts and cultural activities have become less important due to rising cost of living.

However, 16% of respondents still felt that arts and cultural activities had become more important because of rising costs, with half of these respondents reporting it helped improve well-being and mental health. In addition, common responses included placing more importance on arts and cultural activities to try new experiences and a desire to do more post-COVID. The groups more likely to state that arts and cultural activities have become more important included those aged 16 to 34 (25%), people with children at home (22%), people of the global majority and/or minority ethnic backgrounds (32%) and those who are financially comfortable (22%).

16%

Still feel arts and cultural activities have become more important because of rising costs.

Impacts of rising costs on life and finances

To better understand the cost-of-living crisis as an emergent barrier to cultural participation, the respondents were asked a number of questions regarding their current financial situation and the broader impacts of rising costs on their life. While around a third (35%) currently feel very or relatively comfortable financially, a further 43% reported only feeling able to comfortably cover the essentials, without often having money for luxuries. In addition to this, almost a quarter of the population (22%) are struggling financially, with younger people and the least affluent social grades most impacted.

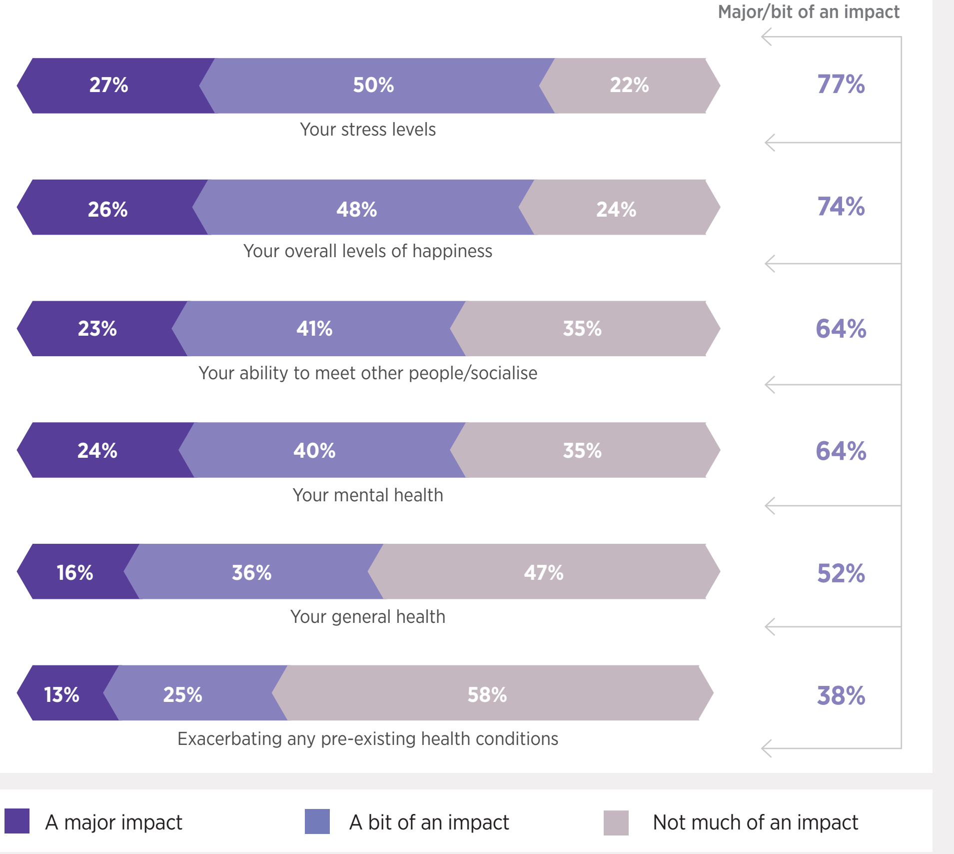
77%

Of respondents feel the cost of living crisis is having an impact on their stress levels.

When asked to look to the future however, just over two-thirds of the population agree to some extent that they are worried about their household's finances for the year ahead (69%), a significantly higher percentage than when this question was asked in February 2022 (48%).

The cost of living is impacting on the population in a variety of ways. As shown in **Figure 2**, the largest percentages reported impacts on their stress levels, overall happiness, ability to socialise and mental health. Groups most likely to be impacted in a range of different ways include women, younger age groups, those with children at home, those in lower socio-economic groups, people with a long-term illness or disability and people of the global majority and/or minority ethnic backgrounds.

Figure 2: 'To what extent is the cost-of-living crisis having an impact on the following areas relating to how you are feeling at the moment?'



Please note, throughout the document, where some graph percentages don't add up to 100% this is due to rounding.

Participating at home

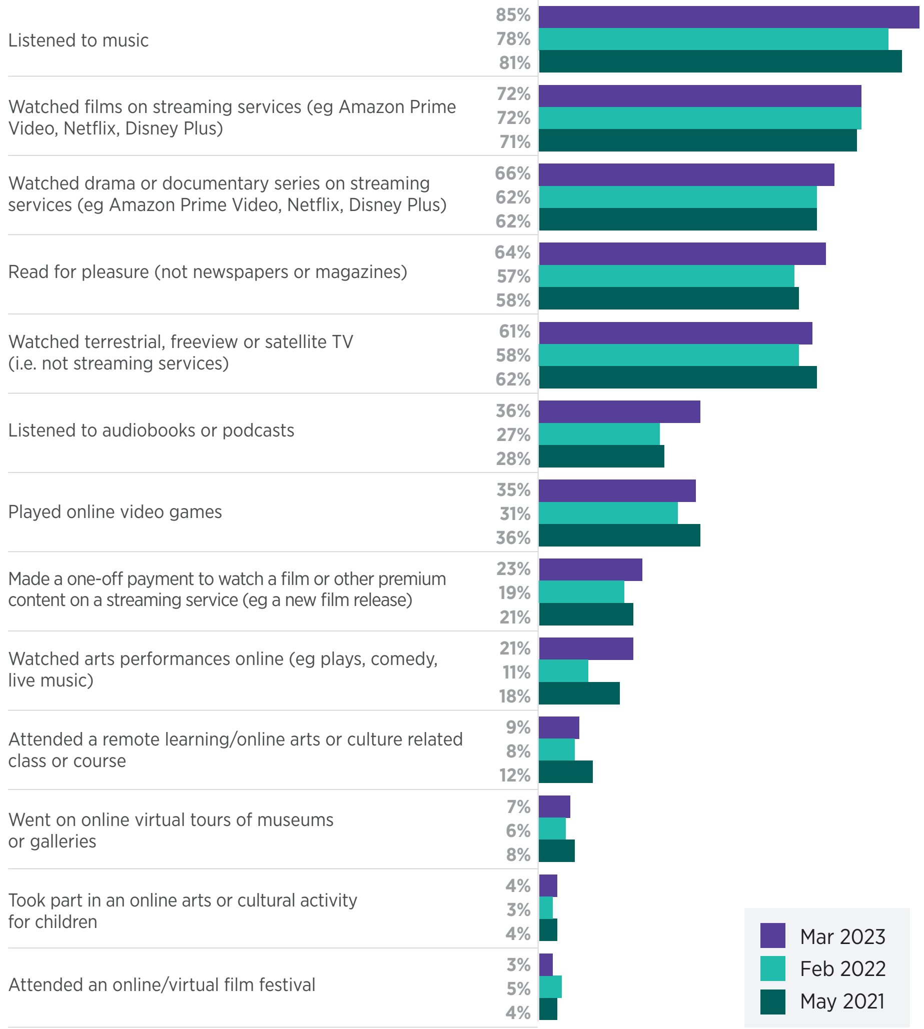
Participation in certain in-home cultural activities has increased since February 2022, in some cases returning to the higher levels recorded during the first lockdown period (**Figure 3**). The most commonly undertaken activities continue to be listening to music (85%) and watching films on streaming services (72%) while two thirds had watched dramas or documentaries (66%) and/or read for pleasure (66%).

21%

Of the population reported viewing performing arts online.

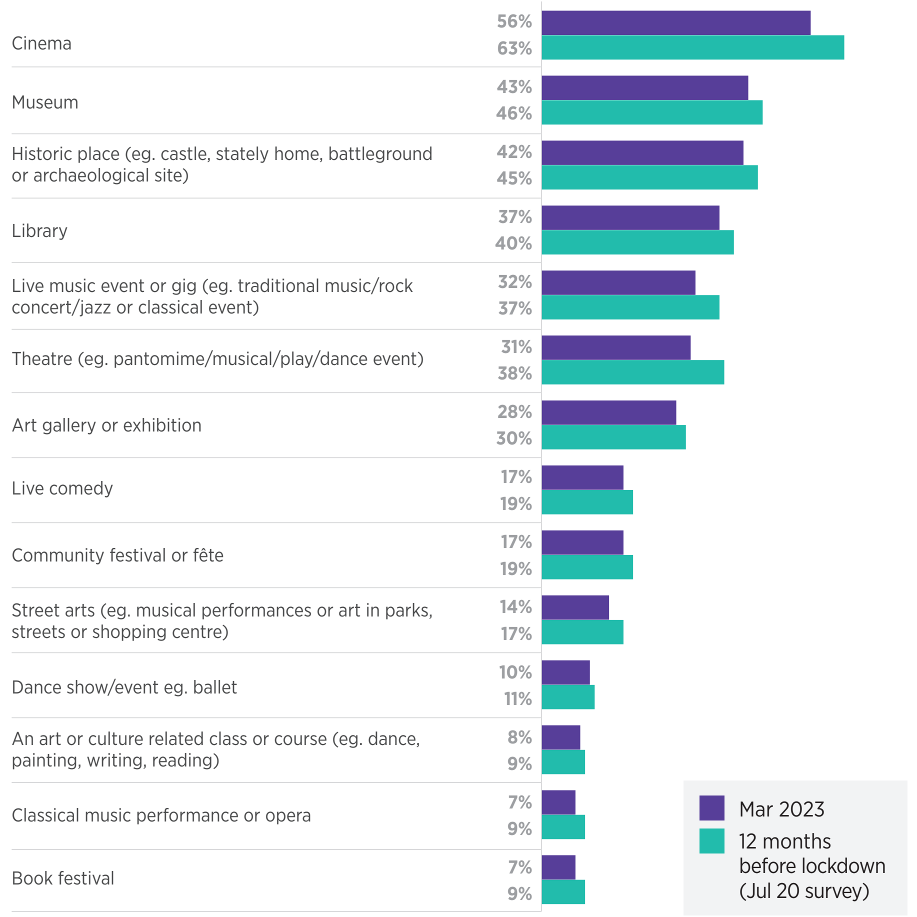
There has also been a small increase in participation in some 'substitute' cultural activities that could be compared more directly with attending cultural events and venues, reversing the downward trend in this kind of participation tracked since August 2020. For example, 21% of the population reported viewing performing arts online, up from 11% in February 2022. However, engagement with online activities such as virtual tours of museums or galleries, online arts or cultural activity for children, or attending a virtual film festival remain low.

Figure 3: 'during the last 12 months which of the following cultural activities, if any, have you done at home?'



In-person cultural activity

Figure 4: 'During the last 12 months did you go to any of the following types of cultural events or places?



Respondents selected the cultural events or places they had attended in the last 12 months from the list shown in **Figure 4**. Encouragingly, year on year cultural attendance has continued to rise from 50% in 2022, to 87% in March 2023, reflecting the relaxation of restrictions and re-opening of arts and cultural venues. However, levels of arts and cultural participation have not fully recovered to pre-pandemic levels. Overall, 87% had attended any of the events or places shown in Figure 4 during the 12 months prior to March 2023, compared to 96% in the 12 months prior to lockdown. In both periods the largest percentages of the population had attended cinema, museums, historic places or live music events. The most notable decreases in attendance include cinema (from 63% to 56%) and theatre (from 38% to 31%).

87%

There has been an 87% rise in cultural attendance in 2023, from 50% in 2022.

Figure 5: 'Overall how would you rate the quality of your experience?'

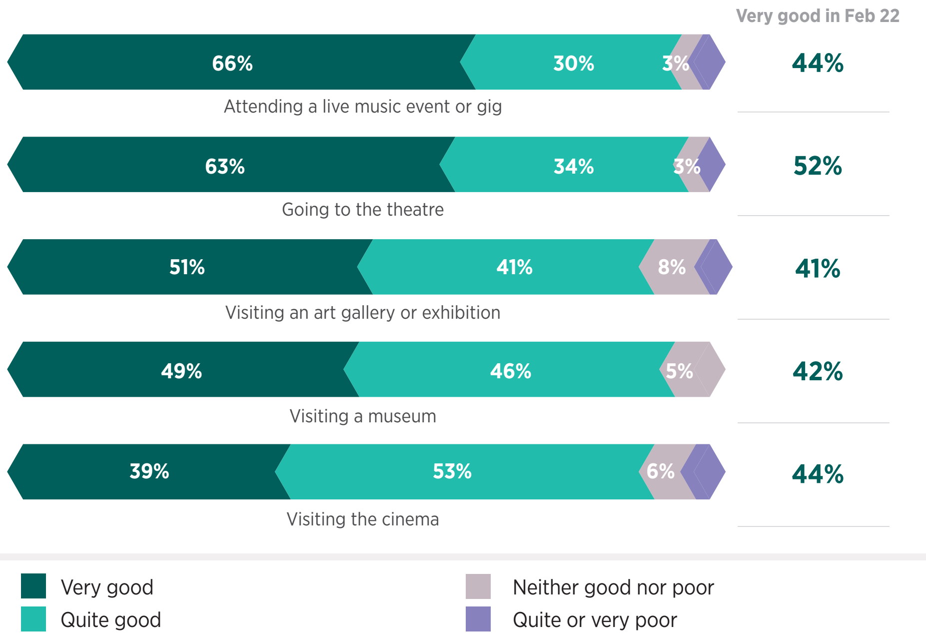
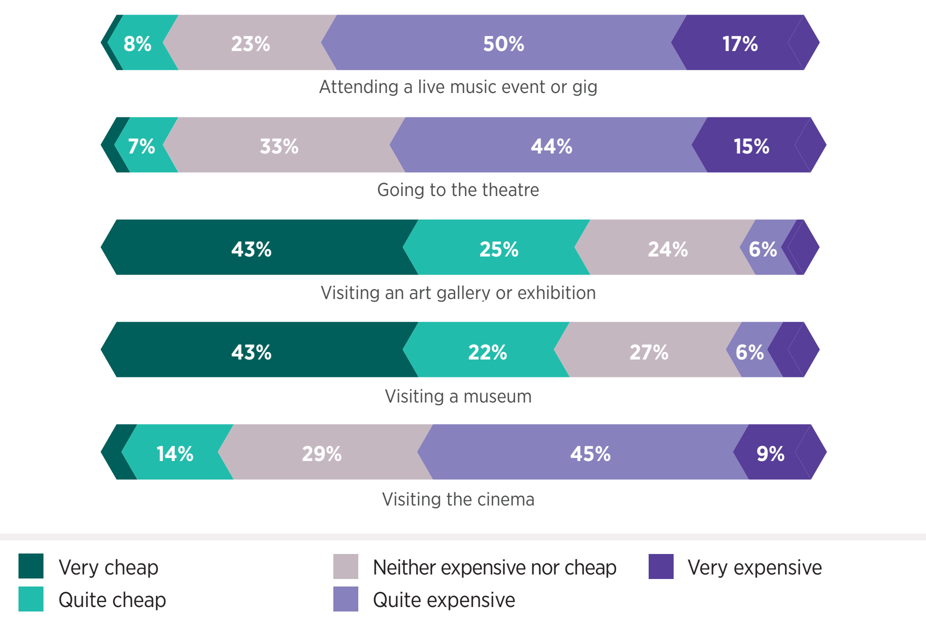


Figure 6: 'And how would you rate the price that you paid to attend?'



In general, experiences of attending cultural activities have improved, with higher satisfaction ratings than those recorded in 2020, 2021 and 2022. The top rating of 'very good' was most likely to be provided in relation to live music events (66%) or going to the theatre (63%). In contrast, those attending the cinema were more likely to provide a rating of just 'quite good' (53%), with 'very good' ratings decreasing slightly from 2022 responses. (**Figure 5**).

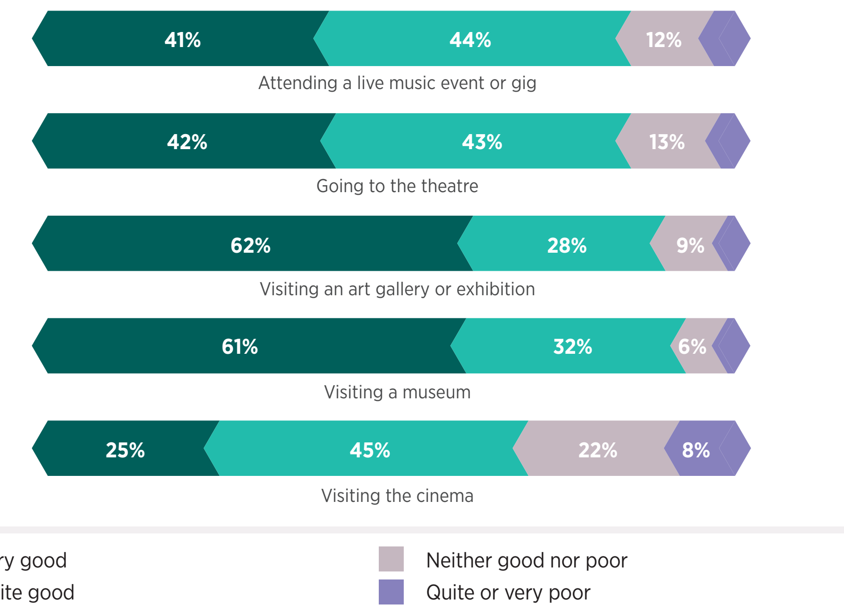
Respondents were also asked to rate the price they paid to attend these cultural activities and were given the options 'very cheap,' quite cheap,' 'neither,' 'quite expensive' and 'very expensive.' Price ratings were somewhat more varied with just over half rating art galleries and museums as very or quite cheap while over half rated cinema, theatre and live music as very or quite expensive. Most notably two in three (67%) rated the live music events attended as being quite or very expensive. (**Figure 6**).

Taking both the experience and the price paid into account, the majority of those attending cultural events and places rated value for money as either very or quite good (museums – 93%; art gallery/exhibitions – 90%; theatre – 85%; live music events 85%; cinema – 70%). Art galleries and museums were particularly likely to receive the highest 'very good' rating (62% and 61% respectively), while only a quarter provided cinema with this rating. However, 41% of respondents rated live music events as 'very good' value for money, even though they were rated as the most expensive.

93%

Of the population rated museums as very or quite good value for money.

Figure 7: 'And considering the experience you had, how would you rate the value for money you obtained?'



Future Outlook on cultural attendance

Respondents were asked about the likelihood of attending different cultural events during the next 12 months compared with the last 12 months, 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’). The results are summarized in Figure 8, excluding those who would not have considered an activity and illustrating that levels of demand for the next year are varied.

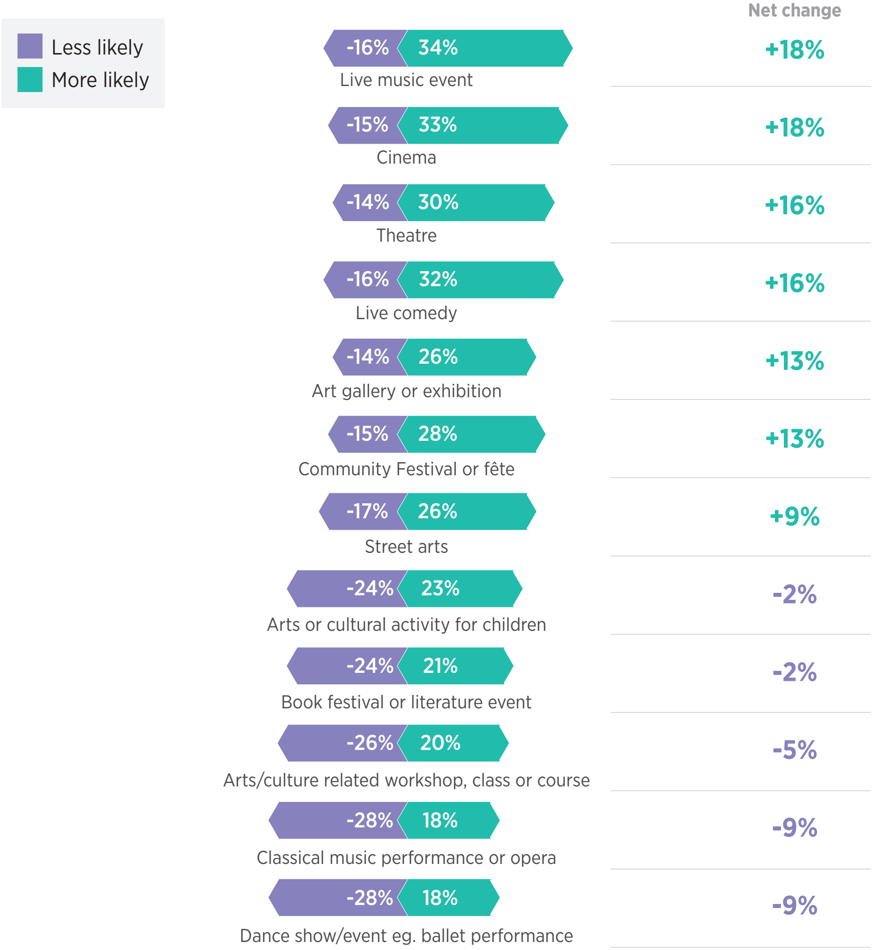
Overall, these results suggest increased demand for several activities including live music (+18%), cinema (+18%), theatre (+16%), live comedy (+16%) and art galleries/exhibitions (+13%). However, an overall negative net change is recorded for other activities such as classical music performances and opera (-9%) and dance shows (-9%).

When asked for further details, cost was the most frequently provided reason for being less likely to attend, mentioned by over half of respondents who were less likely to attend in future. Other reasons included being too busy (14%) and a lack of suitable options for them to attend (10%).

With the exception of art galleries, the proportions booked or planning to attend arts and cultural events is lower than a year ago. 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 booking, the largest proportions were expecting to attend the cinema or live music in the future (51% and 48% respectively). Live music was the activity which people were most likely to have a booking for (23% overall).

Those respondents who had booked or were planning to attend events or activities were asked when they expected to attend. 63% expected to attend the cinema within the next 2 months (i.e. in March or April 2023) while around a third expected to attend an art gallery within this time period (32%). In contrast, plans to attend live comedy, literary events, dance shows or community events were likely to be further into the future.

Figure 8: ‘Compared to the last 12 months, to what extent if any are you any more or less likely to do the following activities during the next 12 months’



Potential Barriers to engagement

Almost three quarters state that ticket prices have become a more important consideration when deciding whether to attend, and over two-thirds stated that personal/household budgeting considerations or having less money to spend had become more important to them (**Figure 9**). In addition, the costs of food and drink and travel had also become more important for over half. Groups more likely to say that factors relating to price had become more important included women, younger age groups, those in the C2DE social grades, people of the global majority and/or minority ethnic people/groups and people who indicated that they are struggling financially.

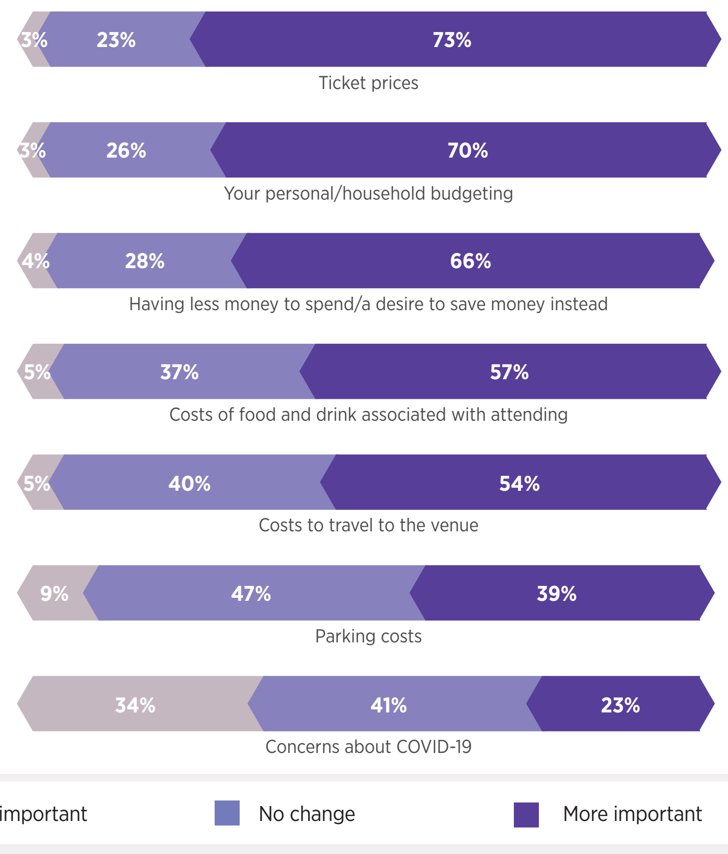
Furthermore, increasing costs are impacting on decisions for the majority with around half cutting back on their expenditure on arts and culture. When asked to respond to the statements shown in **Figure 10**, three in five Scots agreed that being certain that an event would be enjoyable had become more important than before. Also, over half agreed that they need to save money by spending less on arts and cultural events and places.

Much like previous findings regarding the impacts of rising costs, women, younger age groups, families, people of the global majority and/or minority ethnic people/groups and people who were struggling financially were the groups most likely to be making changes to how they attend and engage with the arts.

>66%

Over two thirds felt that budgeting considerations had become more important.

Figure 9: 'When you are deciding whether to attend arts and cultural events and venues, to what extent, if any, have the following factors become any more or less important to you than a year ago?'



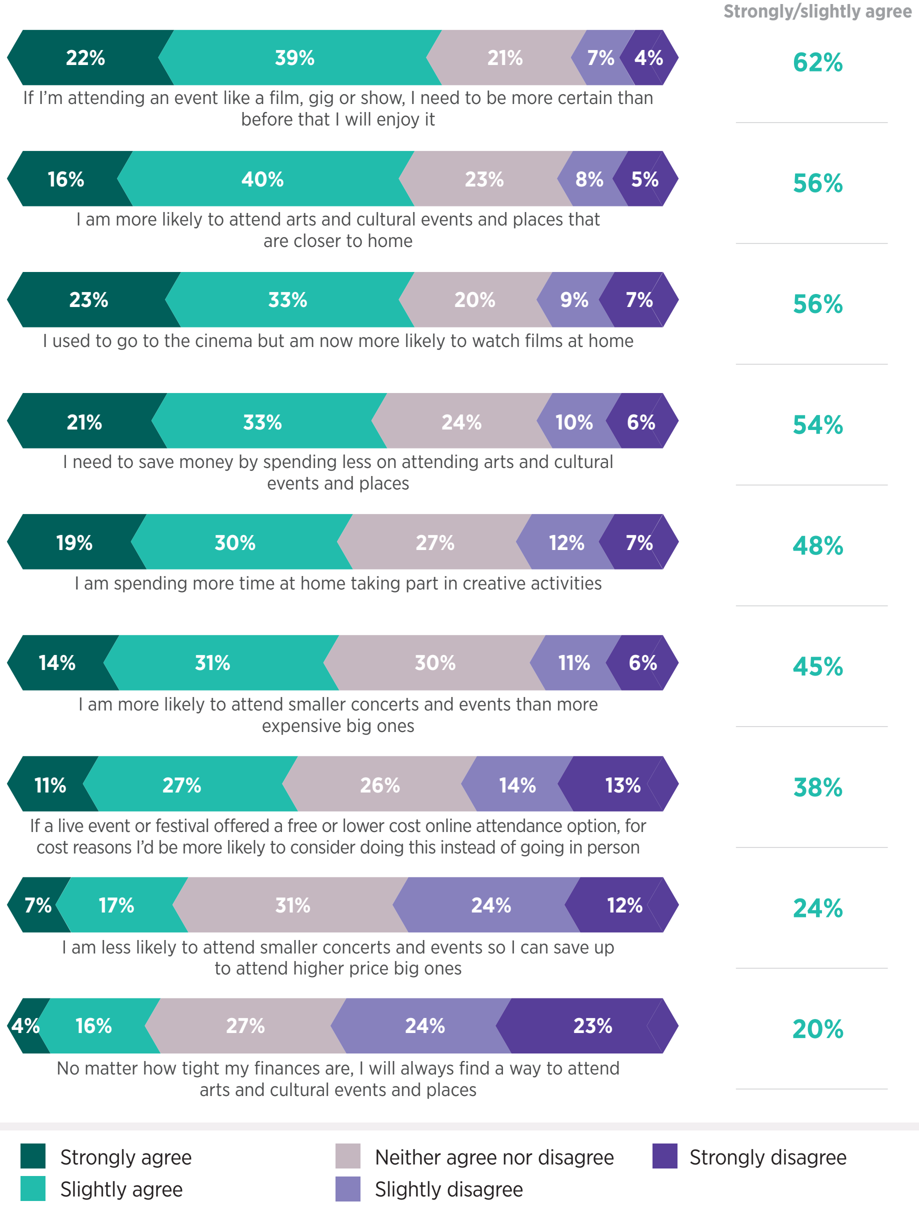
62%

Agreed that being certain an event would be enjoyable had become more important.

When prompted to consider cultural attendance in the context of cost-of-living concerns, the survey found that over half of the population are less likely to attend paid for arts and cultural events. Respondents were shown a list of leisure activities, and asked to what extent, if any, they would be more or less likely to do each of these now than would have been the case before the cost-of-living crisis. Overall, respondents reported that they were more likely to spend time at home taking part in creative activities (+26 net increase) or taking trips to country parks or other scenic (+25).

The majority indicted that they were less likely to take part in a number of paid for activities including 'attending arts or cultural events/venues which you pay to attend' (-44), 'attending live sports events which you pay to attend' (-40) and 'going to a bar or restaurant' (-45). Net change was minimal for arts and cultural events/venues that were free of charge, with similar percentages either more or less likely to attend in 2023.

Figure 10: Impacts of cost on attitudes to arts and cultural attendance



Please note – this Figure doesn't illustrate the small percentage of respondents who provided a response of Don't Know.

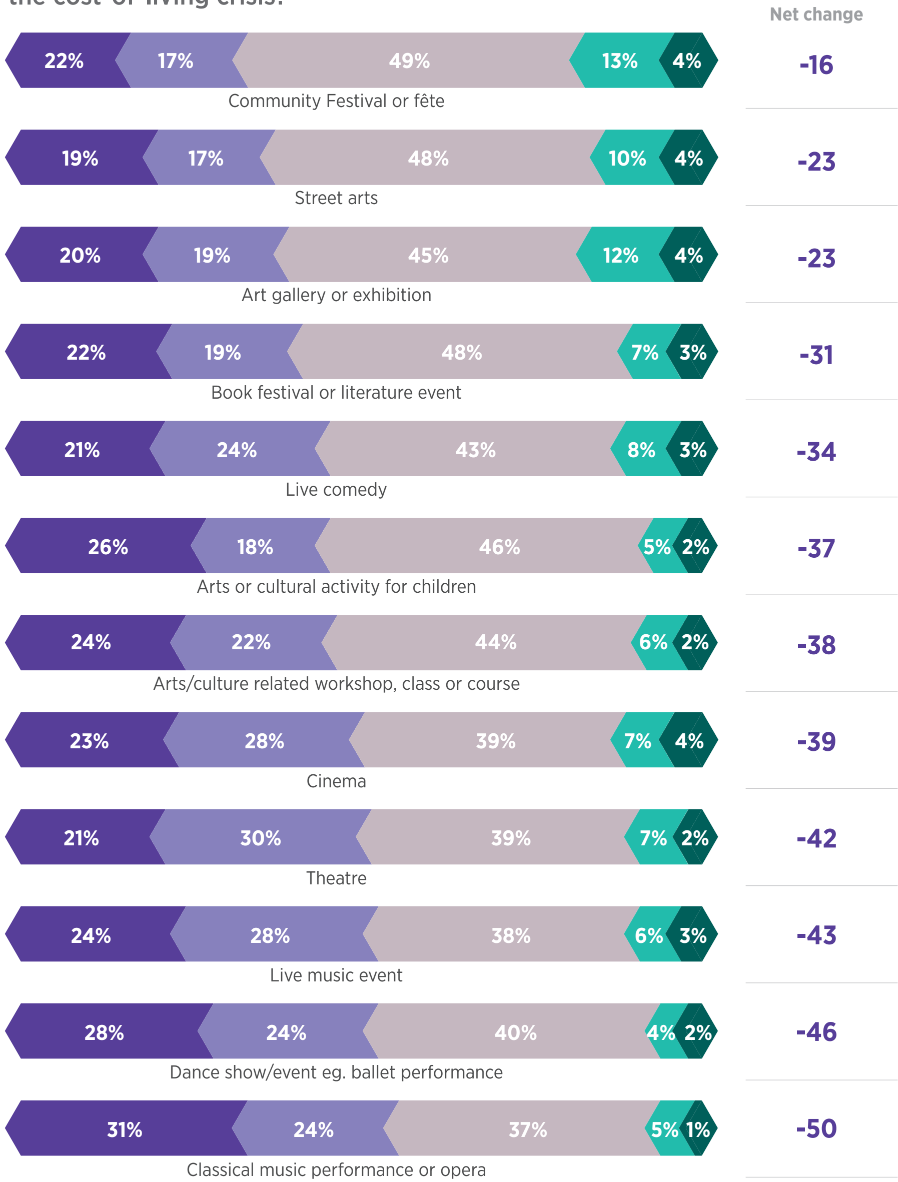
Finally, respondents were asked about attendance to specific arts and cultural events within the context of increasing costs of living. As shown in **Figure 11**, while a negative net change was recorded for all the activities in this instance, this was most pronounced for theatre, live music events, dance shows and classical music performances.

A follow up question was asked of those stating that they were less likely to attend, asking whether they believed that costs for attendance had increased. Overall, 96% stated that from their experience costs to attend had increased with 76% believing ticket prices had increased. 66% reported that the cost for items bought at the event had increased (e.g. food and drink, merchandise) and 60% noted that costs to travel to venues had increased.

96%

Stated that costs for attendance had increased.

Figure 11: 'More specifically, with the rising cost of living are you any more or less likely to attend the following cultural events and places than you before the cost-of-living crisis?'



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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