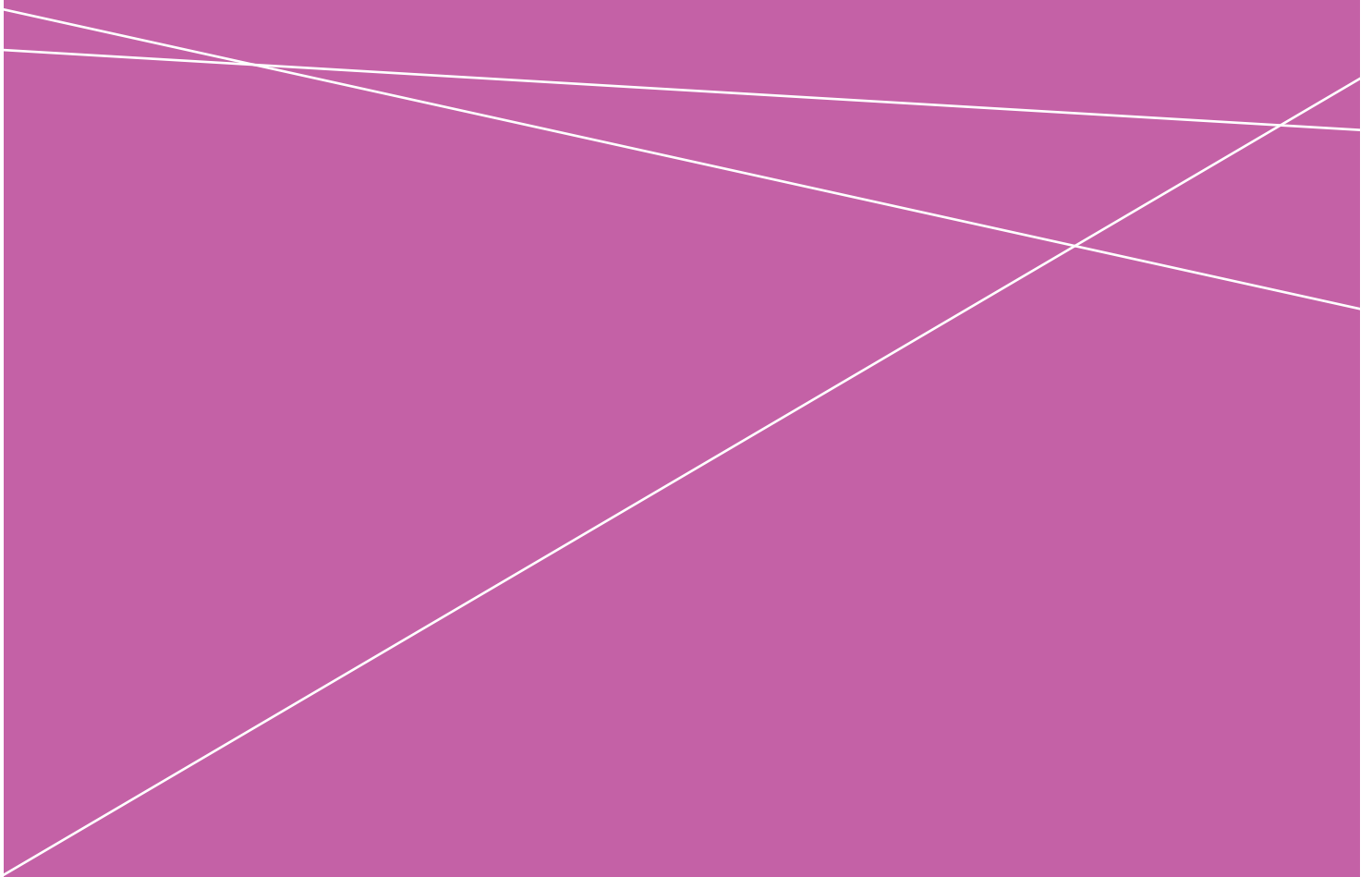


Creative Scotland

COVID-19 Population Survey

Wave 3 – May 2021





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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 1,033 participants to complete an online survey, a representative sample of the Scottish population. A subsequent second wave of the report was undertaken in November 2020 to allow for comparison of how attitudes had changed since the summer for 2020. 1,101 online surveys were conducted in the second wave. The findings of the first and second waves are available on the Creative Scotland **website**.

This report sets out the findings of the third wave of the research, with fieldwork undertaken between the 7th and 17th May 2021. This wave updates our understanding of public opinion on returning to cultural activity and 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. 1,071 interviews were conducted in the third survey wave. Respondents were asked about 4 main topics:

When will audiences return to cultural activity?



What are the main barriers, or enabling factors, to this return happening?



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



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



This summary report provides the key findings from this second wave of research. To access the full report, go to: www.creativescotland.com/COVID19-audience-research

Introduction

This survey research, commissioned by Creative Scotland and undertaken by 56 Degree Insight in May 2021, aims to better understand the Scottish population's attitudes to attending cultural events and venues. It was undertaken as the rollout of COVID vaccines was well underway and the easing of restrictions began, but while Scotland remained in tiered restrictions affecting public life.

The findings show that the desire to attend cultural events and venues remains strong. The creative sectors may, however, recover more slowly than other parts of the economy and public demand will vary between organisations, art forms and the venues in which work is presented:

Attitudes to culture

- Over a fifth of the adult population in Scotland report that arts and culture have become more important to them since the beginning of restrictions in March 2020.
- Throughout the pandemic, over half of Scotland's population have consistently reported they really miss attending cultural venues and events.
- 40% of respondents were supportive of being able to make a voluntary donation to a 'recovery fund' when buying tickets for cultural events and venues.

Culture in lockdown

- During the pandemic most of the population have listened to music, watched films, drama or documentaries or read for pleasure.
- For most, this has meant they actually increased their participation in at-home cultural activities compared to the year before the first lockdown.
- Respondents had watched a range of online performances, usually at no cost: 42% either paid a fee or donated for online performances.

Current demand

- Demand for most types of arts and cultural events remains suppressed but is rising. Since November 2020 the desire to take part in all cultural activities has increased, with the public most looking forward to returning to cinema, live music and the theatre.
- Nevertheless, demand for cultural activities as restrictions ease remains lower than for many other leisure pursuits, as reported in previous waves of the survey.

Future plans

- While many people remain wary of returning to arts venues, interest has increased since 2020, most notably for attending live music events or gigs.
- As in previous surveys, interest in outdoor events was greatest. However, the proportions who stated that they would feel comfortable with any of the venue types was higher in May 2021 than in either of the 2020 survey waves.
- Two-fifths of the population are already booked or planning to attend the cinema while a third are planning to attend live music.
- Most who plan to visit a historic place, museum or gallery expect to go in the next two months, those attending live performances hope to do so later in summer or autumn.
- One in 8 respondents would definitely be interested in engaging with cultural events online in future.

59%

Are comfortable with
1m distancing with
additional protection

Enablers and barriers

- Enforcement COVID-19 restrictions and audience capacities at venues remains important for the public.
- In this survey wave, 59% of the population were very or fairly comfortable with the option of 1-metre distancing if there were additional protection such as face coverings, Perspex screens, recording of contact details and time limitations. This percentage has increased from 46% in November 2020.
- Just over half of the population support the idea of cultural events only being available to people who have just obtained a negative COVID test.
- The public are using a range of formal and informal information sources to plan cultural activities but would like more information to help them do so.

Culture in Lockdown

Reflecting on the period since the initial lockdown began in late March 2020, over a fifth of the adult population in Scotland report that arts and culture have become more important to them (21%). 64% feel that the importance of the arts and cultural activity to their lives has not changed while they have become less important for 10% of the population.

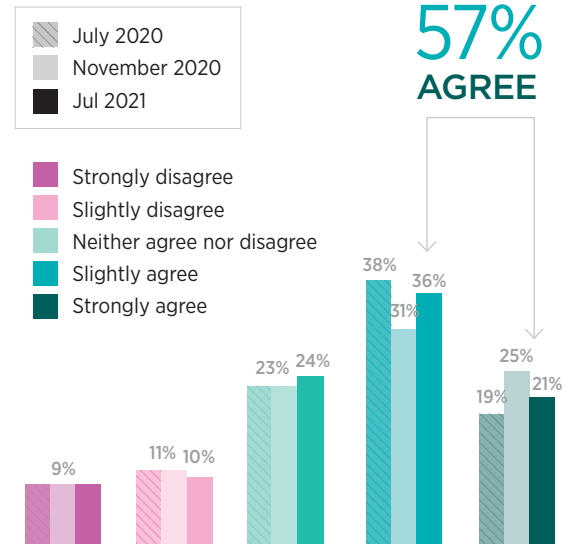
"The pandemic has reminded me of how important the creative arts are for society as a whole; I have really missed attending live theatre and visiting art galleries and museums."

Over half of the population report they really miss attending cultural venues and events. Reflecting on the period since initial COVID restrictions began in late March 2020, 57% of the population agree that they have 'really missed the opportunity to go to cultural events and venues' and only one in five disagreed. This figure has remained consistent through the three waves of this research, although the proportion of those strongly agreeing has varied (**Figure 1**). Since lockdown began, those who missed cultural venues and events most was higher amongst certain demographic groups, including those in the more affluent socio-economic groups, women and people aged under 35.

57%

Agree they have missed cultural events

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



Levels of participation in cultural activities undertaken at home have remained high and as with the previous waves of the survey, the most commonly undertaken activities were listening to music (81%) and watching films on streaming services while over half had watched dramas or documentaries (62%), watched television (62%) and/or read for pleasure (58%) (**Figure 2**).

Around 30% of the population had participated in 'substitute' cultural activities that could be compared more directly with attending cultural events and venues, for example viewing arts performances online, taking online tours or attending courses online. Of those who had watched online performances at home since lockdown restrictions began, half (48%) had watched a performance presented live from a cultural venue (48%) and 41% watched a content created at home by the performers. Two-fifths (41%) had either paid for the online performance or made a donation.

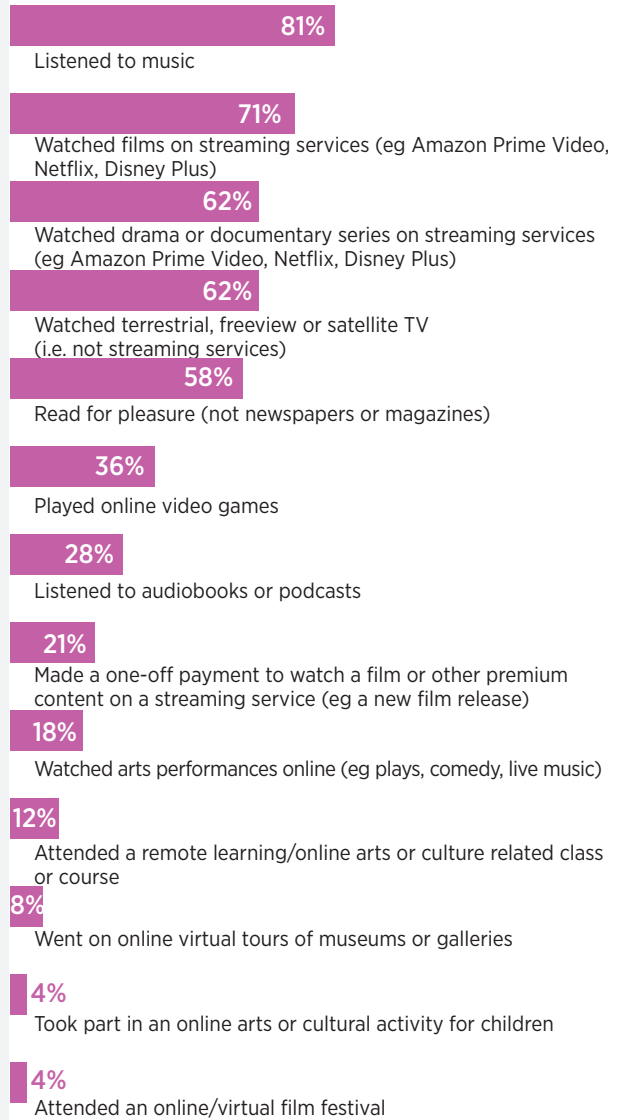
Overall, the population increased their participation in at home cultural activities compared to the year before the first lockdown. Over a third of respondents reported watching more films, drama or documentaries on streaming services, watching terrestrial, Freeview or satellite television, listening to music or reading. Three in ten would like to continue to take part in at home cultural activities more often in the future, with people aged 16-34 and people with children at home were most likely to agree. One fifth reported that they enjoyed accessing cultural activity online so much that they would be willing to pay for this activity in the future. This number has remained consistent across the three waves of the survey, suggesting that there is a limited appetite for paid-for online content.

The experiences of those who had already returned to cultural activity were mixed, and in line with reporting in Summer 2020. Overall, less than half providing the top rating of 'very good' for any of the activities listed.

+33%

Reported watching more films, drama or documentaries on streaming services, watching terrestrial, Freeview or satellite television, listening to music or reading

Figure 2: Which of the following cultural activities, if any, have you done at home?



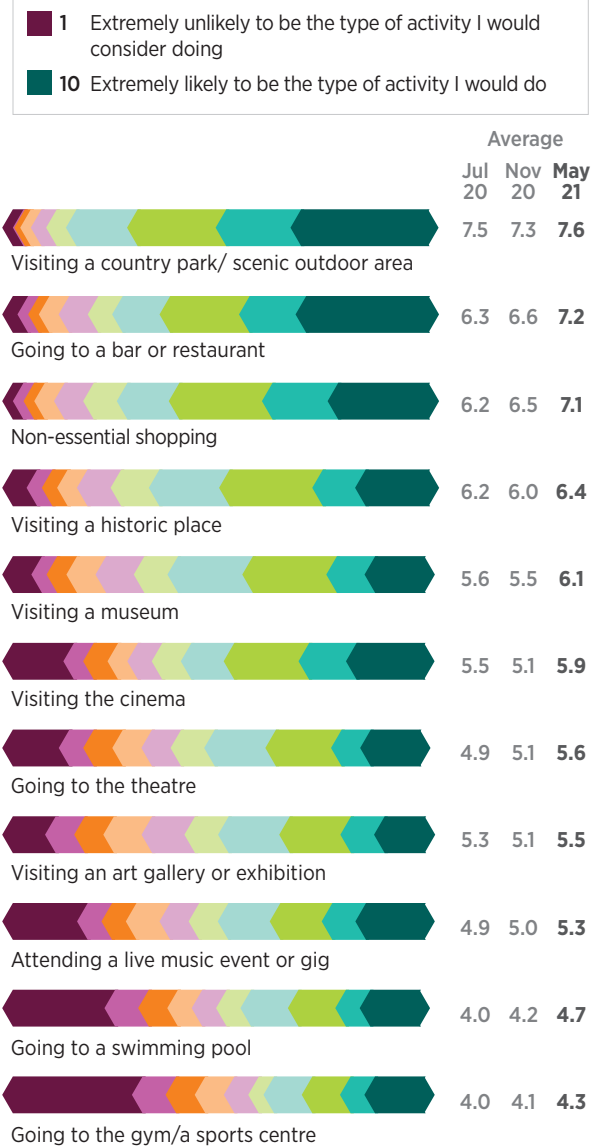
Post-lockdown leisure

While intentions to attend arts and cultural venues vary, they are all higher than recorded in the 2020 survey waves (Figure 3). Respondents were asked to rate their desire to take part in a range of leisure activities.¹ Responses in May 2021 were in a similar order to those recorded in the 2020 survey waves, with willingness to visit country parks and other outdoor areas highest, followed by going to a bar or restaurant and non-essential shops. In terms of arts and cultural activities the desire to visit a museum was highest and attending a live music event or gig was lowest.

The survey also asked people when they intend to take part in cultural and leisure activities again. A large proportion of the Scottish population had already been to outdoor places, shopping centres and bars and restaurants. However, over a quarter stated that they would not visit a theatre or live music event in the foreseeable future (both 27%). When comparing the percentages of who would attend in future (including 'in no hurry'), the May 2021 survey suggests that levels of demand have nevertheless increased for all of the arts and cultural activities since 2020, most notably attending live music events or gigs (increased from 61% to 73%) (Figure 4).

Respondents were asked how, if at all, their consideration for different cultural activities and events had changed compared to prior to COVID 19 with a range of possible responses ('more likely to consider', 'no difference', 'less likely to consider' and 'would not have considered before and still would not'). While demand for several the activities asked about remains lower than before COVID 19 (most notably dance and classical music events), the outlook is most positive for cinema, street arts and visiting historic places. Comparing the net results with those obtained in the 2020 survey waves suggest that the picture has become less negative for every activity (Figure 5).

Figure 3: Thinking about how you feel at the moment, how likely would you be to do this type of activity?



¹ Where the activities are already possible, respondents were asked to base their answer on how they feel about doing them now. Where venues are still closed, respondents were asked to base their answer on when they re-open.

Figure 4: Which, if any, of the following best describes when you would feel happy to do this type of activity?

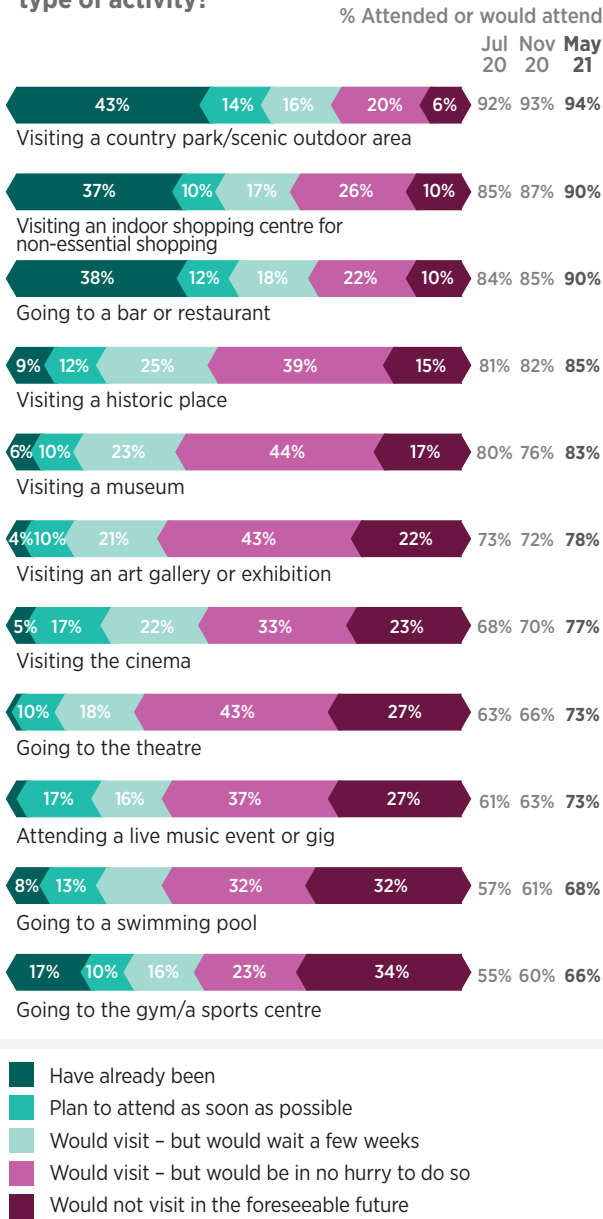


Figure 5: How have your preferences changed compared with what you might have chosen to do before the COVID-19 outbreak?



Attitudes to cultural attendance

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

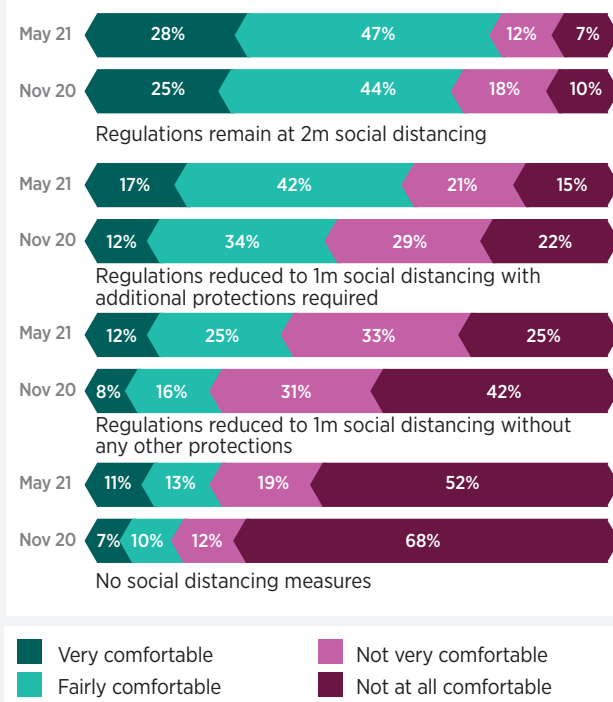
Respondents were also asked how comfortable they would feel attending indoor cultural venues soon with the range of social distancing requirements shown in **Figure 6**. In May 2021, 59% of the population were very or fairly comfortable with the option of 1 metre distancing but with additional protection such as face coverings, Perspex screens, recording contact details and time limitations in place. This percentage has increased from 46% in November 2020. Population

groups most likely to feel comfortable with 1 metre distancing with additional protections included those aged under 45 (67%) and members of the more affluent socio-economic groups (62%). In contrast less than half of the population were comfortable with 1 metre distancing without other protections (37%) or no social distancing being required at all (24%).

When asked to comment on the factors that would be important when deciding on whether to attend different arts and cultural activities, the most frequently provided responses related to controls on the numbers of people/capacity at events and venues (29%) and in general having confidence that venues were enforcing the required restrictions (21%). It is also notable that 12% of respondents stated that nothing would influence them or that they had no concerns while 8% indicated that they would only be influenced by whether the event interested them. In comparison to the responses obtained when the same question was asked in November 2020, the percentage of people mentioning concerns over the number of people attending and health and safety precautions increased in May 2021.

As context to help understand views towards arts and cultural attendance in the future, respondents were asked about their levels of concern regarding the health and financial impacts of the pandemic. While much of the population remains worried about the impacts of COVID-19 on health and finances, concerns have reduced since November 2020.

Figure 6: If you were to go to indoor cultural activities, how comfortable would you feel about the following?



29%

Felt controls on capacity would be the most important factor when deciding whether to attend events

Returning to cultural activity

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

74%

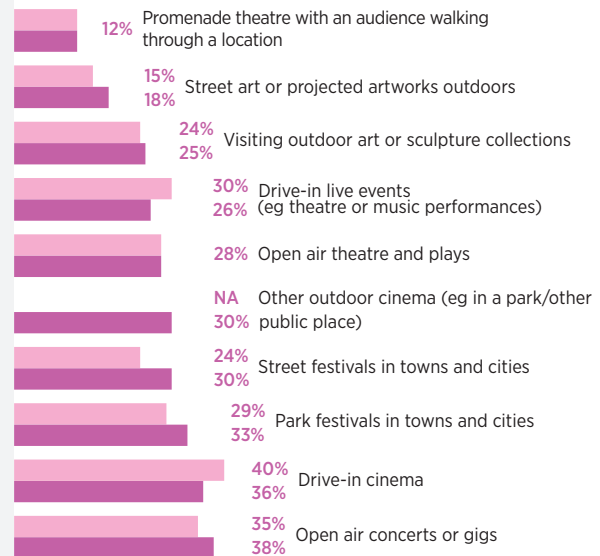
are interested in attending one or more of the options for outdoor events

People continue to be interested in different ways of engaging with arts and culture. Overall, 74% of Scotland's population stated that they would be interested in attending one or more of the options for outdoor events shown in **Figure 7**, an increase from 70% in November 2020. 38% are interested in open air concerts or gigs and just over a third are interested in attending drive in cinema. Possibly reflecting the time of year of surveying, the appeal of a number of the outdoor events increased generally since previous surveys, in particular, park and street festivals. Levels of interest in outdoor events were highest amongst women (78% vs 70% of men), people aged under 45 (82% vs 68% aged 45+) and people with children at home (80% vs 71% with no children).

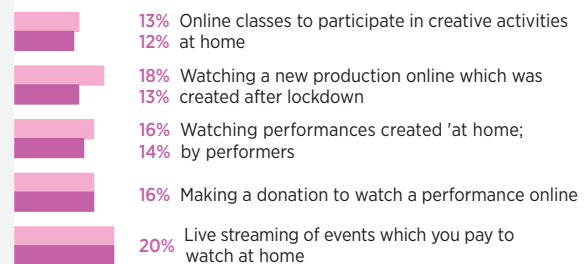
12% of the population reported they would definitely be interested in engaging with online cultural events in future, a decrease from 18% recorded in November 2020. A further third (33%) stated that they would possibly be interested. Groups most likely to state that they would definitely be interested included those aged under 45 (18% vs 8% aged 45+), people with children at home (20%), people with a disability or long-term illness (19%) and members of the BAME population (28%).

Figure 7: Which of the following would you be most interested in attending if offered in your local area?

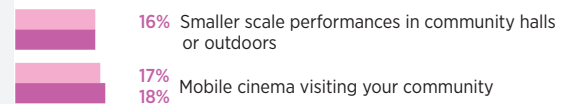
Outdoor events – 74% overall (70% in Nov 2020)



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



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



Nov 2020

May 2021

40% were supportive of the idea of being able to make a voluntary donation to a 'recovery fund' when buying tickets for cultural events and venues, a similar percentage to that recorded in November 2020. Population groups most likely to agree with this suggestion included those aged under 45 (47% vs 35% aged 45+) and people who attended any cultural

activities in the 12 months prior to the first lockdown – particularly those people who had been to classical music performances (61% agreed), live comedy (58%) or book festivals (58%).

Much of the population would like more information to help them to make plans for attending arts and cultural activities later in 2021. When asked if there were any particular areas where more information would help them to make firmer plans, the most common responses related to firmer information on opening dates, information to reassure them on protective measures and practical information such as how to make reservations. The most common sources of information were speaking to friends and family (51%) and information on the Scottish Government website regarding dates for re-opening (41%). Around a third had used cultural organisation or venue websites (32%).

40%

Were supportive of being able to make a voluntary donation to a 'recovery fund'.



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