Scottish Audience Intentions

Survey Summary Report

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Contents

Key findings

Lockdown Experiences

- Most (73%) respondents said that they had done one of a list of cultural activities online during lockdown. The most popular activities to have done more than usual were 'streamed talks, conversations or podcasts' (37%), streamed theatre performances (30%), streamed concerts (29%) and streamed museum/gallery tours (27%).
- Younger audiences (16-34 year olds) were much more likely to have engaged with online arts or cultural events for children, workshops, podcasts, streamed films and streamed literature events than over 60s, and less likely to have engaged with virtual museum and gallery tours. 29% of those with children in the household had engaged with online arts or cultural events for children.
- Higher-engaged Audience Spectrum[1] groups were particularly likely to have listened to 'streamed talks, conversations or podcasts' (52%, cf. 27% and 30% for medium and lower-engaged groups respectively), as were urban rather than rural audiences (38% vs 28%).
- Middle-aged audiences were most likely to have paid for fixed-price content (40% cf. 33% overall) and both they and younger audiences were most likely to have made a donation (38% and 39%, cf. 35% overall). Older audiences were more likely to have paid for something by virtue of it being included in a membership (13% cf. 10% overall).

Future Attendance

- Half of respondents said that they were likely to attend about the same amount in future as they ever had, with a substantial 26% 'not sure' whether they'd attend the same amount, or more, or less: reflecting the widespread lack of certainty at the moment. The remaining 25% were three times as likely to say they would attend 'less' than 'more' (19% vs. 6%), implying a moderate ongoing contraction to average audience frequency.
- This difference varied between those who had shielded and those who hadn't (31% 'less', 6% 'more' vs 17% and 6%); but also by age, with 27% of those 16-34 saying they'd attend 'less' but only 14% of over 60s (this was particularly reflected in higher potential volatility of attendances for Experience Seekers, a younger-than-average group). Pre-booking would make all of these groups more likely to attend.

[1] For details about Audience Spectrum segments, see Appendix 2

- Approximately 10% more of those with children or without disabilities expected to attend the same amount, with an equivalent proportion less ‘not sure’ (an effect even more pronounced for those who were shielding). Visual arts audiences were also more likely to say they would attend less.

Payment to Support Organisations

- The most popular approach to supporting organisations during COVID was through a suggested voluntary surcharge (78% ‘definitely’ or ‘might’ consider this; 37% and 41% respectively). Support for this was relatively even across audience types, but more popular with those who had shielded (46% ‘definitely’).
- The next most popular approach to supporting organisations during COVID, with similar levels of support, was through a voluntary donation (78% ‘definitely’ or ‘might’ consider this; 33% and 45% respectively).
- The third most popular approach was paying more than before, also supported by most respondents (74% ‘definitely’ or ‘might’; 31% and 43% respectively). The proportion who ‘definitely’ would is higher for older age groups (37% of those 60+), those who have shielded (42%), visual arts audiences (41%) and those in rural areas (42%).
- Other approaches were less popular (with ‘definitely’ or ‘might’ totalling 67% for memberships, 55% for crowdfunders, 60% for ‘something else’, although the former did have a notable 33% who would ‘definitely’ consider memberships, which is promising, given the commitment this suggests). It would be useful to explore in more detail the types of membership that audiences would support (e.g. discount schemes, enhanced access/benefits, charitably-motivated etc).

Motivations

- The most important motivations for future attendance were the particular product (67%), ‘supporting the organisation’ (61%), ‘getting back to normal’ (40%) and ‘re-immersing myself in culture’ (31%). For families, a ‘family day out’ (28%) was also important.
- ‘Having a communal experience’ was next highest (17%), but more important for visual arts audiences (25%) and 16-34 year olds (22% — who were also particularly motivated by ‘getting out of the house’ with 19%, cf. to an average of 10%).
- For those describing their motivations for a visit that they had *already* made since lockdown, the balance was notably different. ‘Supporting the organisation’ was the

most-cited reason (76%), with 're-immersing myself' and 'getting back to normal' next (50% and 46%): only then followed by the specific product (43%).

Barriers and Mitigations

- From the range of mitigations listed, there were five main groups:
  - **Those that were widely rated as likely to encourage greater attendance (over 70% 'more likely'), with almost no respondents (under 3%) saying they would visit less often.** These were: 'availability of hand sanitiser', 'reassurance about cleaning' and 'staff COVID training'. There is little reason *not* to implement these from an audience perspective, with the first two particularly important.
  - **Those that are have similarly high proportions saying that they would attend more, but with small proportions (c. 5-10%) saying that they would attend less as a result.** These measures do often impact on audience experience (e.g. 'physical distancing', 'socially-distanced seating', 'measures to manage queuing', 'staff wearing face masks', 'restrictions on audience/visitor numbers'). Given the overall benefit, these are likely to be widely advisable.
  - **A third group had moderate proportions likely to attend more (55-64%) and no more than 4% saying that they would attend less**: 'use of kite marks', 'relaxed refund policies' and 'contactless payment' (largely made up of a minority who said they would be 'much less likely').
  - **A group of responses that have medium to high proportions (45-75%) saying that they would attend more, but where these generally rise along with the proportion who say that it would attend less (7-12%).** These include 'visitors wearing masks' (the most divisive measure, scoring at the top of both brackets, followed by 'pre-booking events' [which was similar to 'amended event times', except that had fewer people who said they were more likely to attend as a result]). These measures are something of a trade-off, since – in general - the more people they *encourage*, the more they *discourage*. However, all but one have over half the audience more likely to attend and those who are less likely are mostly only 'slightly less likely' – they are acknowledged as inconveniences, rather than major barriers.
  - **Finally**, a reduced food and drink offer scarcely convinced a higher proportion to attend more than less (25% vs 14%) as it wasn't important to many of either.

- Thus, whilst some measures were clearly more important than others, a case could be made for almost all of them as benefitting potential attendance.

Visual Arts

- Most core visual arts audiences[2] have returned since lockdown (55%), though 91% attended at least once every 3 or 4 months before lockdown.
- Most of those had a positive experience ('72% very good', 23% 'good') and intend to return soon (80% 'as soon as possible' or 'within a week or two').
- Attitudes are mixed about reattending, however: when asked whether and when they 'would book if something they wanted to see went on sale tomorrow', 75% said they would, but only 39% 'now'.
- The main reasons for waiting given were being worried about the number of people there (50%) or COVID-19 restrictions affecting quality of experience (48%). Just over 1 in 5 said they wanted to stay local at the moment.

Performing Arts

- Only a third (34%) of core performing arts audiences have returned since lockdown (although this could be to any art form, many performing arts venues remaining closed will clearly have affected this, given their preferences). In any case, performing arts audiences were less regular in their previous attendance: 93% in the previous year before lockdown, but only 20% once a week or more, compared to 30% for visual arts.
- Where they had reattended, their views were positive (63% 'very good') but less so than visual arts (perhaps reflecting that their art form preferences were less likely to have been met).
- This group of reattenders was particularly likely to reattend soon, however, with 90% 'as soon as possible' or 'within a week or so'.
- The nature of performing arts events may also be affecting their reasons for concern about reattending, with more concerned about the number of people (62%, cf. 50% for visual arts) and concern about the adequacy of social distancing being selected by 25% (cf. only 11% for visual arts).

[2] Defined as survey respondents (who have mostly attended the surveying organisation in the last 12 months) from venues which programme visual arts, who also say that they have attended visual arts in the last 12 months. 'performing arts audiences' are defined the same, with 'performing arts' substituted for 'visual arts' (and including plays/drama, musicals, music and dance)

Introduction and Method

Project Outline

As part of ongoing partnership working Creative Scotland asked The Audience Agency to design, analyse and report on a survey intended to inform on audience behaviours during, and beyond, the Covid-19 pandemic. This was intended to assess the status around the interruptions to programme, the implications around that, and the propensity for audiences to return/begin attending again, various artforms and venues across Scotland. The results are intended to create a picture, and 'take the temperature', of regular attendees across via a selected group of organisations, producing companies and venues.

The resulting information answered a variety of questions around the following;

- What kind of culture people will be prepared to attend/come back to first?
- What artforms would be accessible first after coming out of First Stage Lockdown
- Draw out Audience Profiling, what audience types are more inclined to return? And why?
- How will such things as facilities, changes to environment or travel be barriers to attendance?
- Attitudes and opinions around returning to culture across artform:
  i.e. Visuals Arts versus other cultural offers, Theatre, Music etc.
- Present breakdown/profiles in Audience Spectrum and Mosaic (Scotland)

Recruiting Organisations: Consultation and beyond

14 organisations were approached and took part in an initial discussion. They were selected to get a balance across venue-based concerns, artforms, and a mix of urban, and rural contexts. The organisations had a chance to comment on what would be most useful to them to find out. The representative final 10 came from a wide range of types of venue, artform, size and location, across the 7 reporting regions in Scotland (as defined in Audience Finder). Urban, peri-urban and rural geographical locations were represented; Central (Dundee, Perth), East Central (Edinburgh), Highlands and Islands (Inverness), West Central (Glasgow) and South. There was also representation of organisation still closed and some that had re-opened since lockdown.

There was drop off from film (as main artform) due to a survey being conducted via BFI, and some survey work that was being conducted by individual organisations, where reaching out to audiences digitally was considered to be too close in time.

Methodology

A survey was sent from the 10 organisations taking part by email to core audiences on their mailing lists of the selected organisations:

- Dundee Contemporary Arts (DCA)
- Centre for Contemporary Art (CCA)
- Imaginate/Edinburgh International Children's Festival
- Collective
- Horsecross Arts (Perth Concert Hall / Perth Theatre)
- Platform
- Red Note Ensemble
- Eden Court
- An Lanntair
- Wigtown Book Festival

Responses were collected between 11th August 2020 and 30th September 2020. Overall 3,843 responses were collected, as follows:

Organisation	Sample size
Horsecross Arts	1,860
Eden Court	625
CCA	522
DCA	365
An Lanntair	129
Collective	108
Platform	101
Wigtown	67
Imaginate	36
Red Note Ensemble	30

The analysis in this report describes respondents within the overall dataset. The data from each organisation has been weighted according to their annual audience size to create a more representative picture. The figures given in this report are weighted responses.

For the full questionnaire, see Appendix 1.

Sample Size and Margins of Error

3,843 questionnaires were completed over the period; this gives a margin of error of c. ±1.5% at the 95% confidence level. This means that we can be 95% sure that if we had asked any of the questions shown to the entire population, a proportion of no more than between 1.5% higher and 1.5% lower than the one given would have also picked that answer.

The margin of error is affected by the number of responses that you have in your sample.

Due to their smaller sample size, the results split by Audience Finder segment, organisational type, or demographic characteristics will have a margin of error ranging from ±2% to ±9% at the 95% confidence level.

If a question has less than 100 responses then the margin of error will be quite high so the results should be taken in an indicative way only.

Audience Spectrum

Audience Spectrum is a population profiling tool which describes attendance, participation and engagement with the arts, museums and heritage, as well as behaviours, attitudes and preferences towards such organisations. It has been built to meet the needs of small and large scale, ticketed and non-ticketed organisations from across the cultural sector.

Each segment has its own characteristics and description: they can also be combined into ‘Higher’, ‘Medium’ and ‘Lower’ engaged groups.

For descriptions of Audience Spectrum segments, see Appendix 2. To find out more and to view fuller pen portraits for each segment visit: www.audiencefinder.org/spectrum

Findings

Lockdown Experiences

Respondents were asked whether they had done various online cultural activities more during lockdown. Most (73%) respondents said that they had done at least one.

The most popular activities to have done more than usual were 'streamed talks, conversations or podcasts' (37%), streamed theatre performances (30%), streamed concerts (29%) and streamed museum/gallery tours (27%).

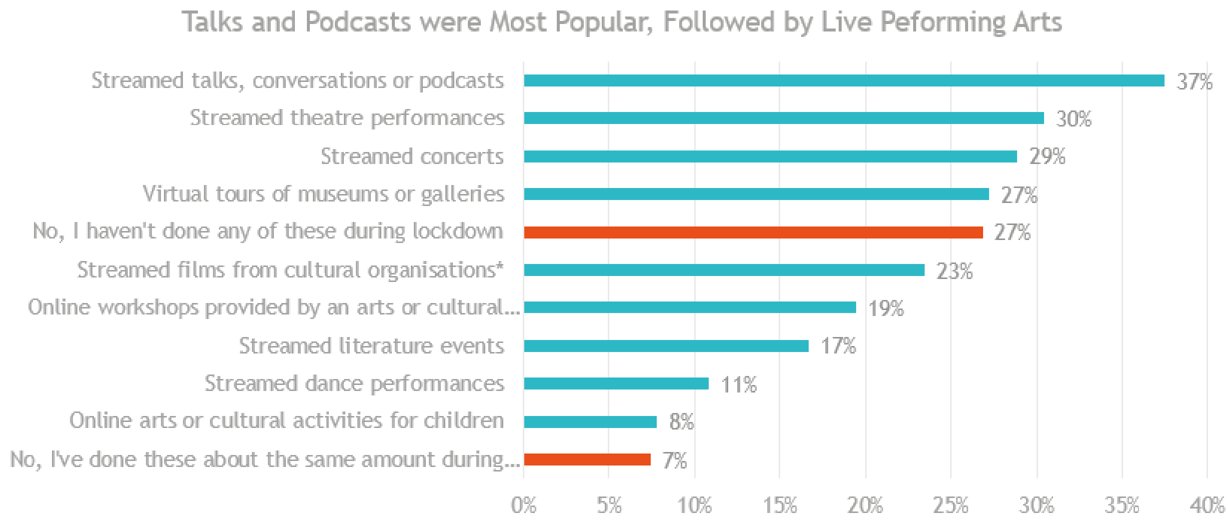


Fig. 1: Base: 2,991 / M.o.E: ±2%

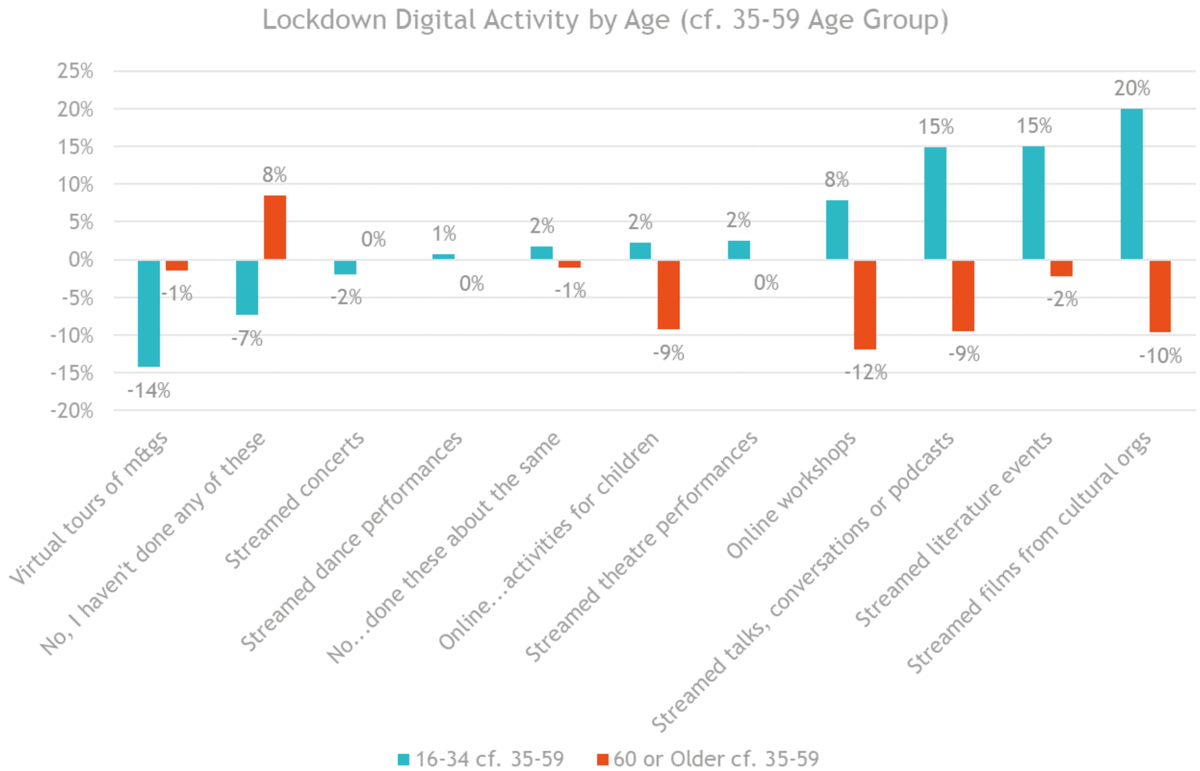


Fig. 2: Base: 189 / 1,488 / M.o.E: ±6% / ±3%

Younger audiences (16-34 year olds) were much more likely to have engaged with online arts or cultural events for children, workshops, podcasts, streamed films and streamed literature events than over 60s, but less likely to have engaged with virtual museum and gallery tours.

Older respondents were more likely to have done ‘none of these’. 29% of households with children had engaged with online arts or cultural events for children.

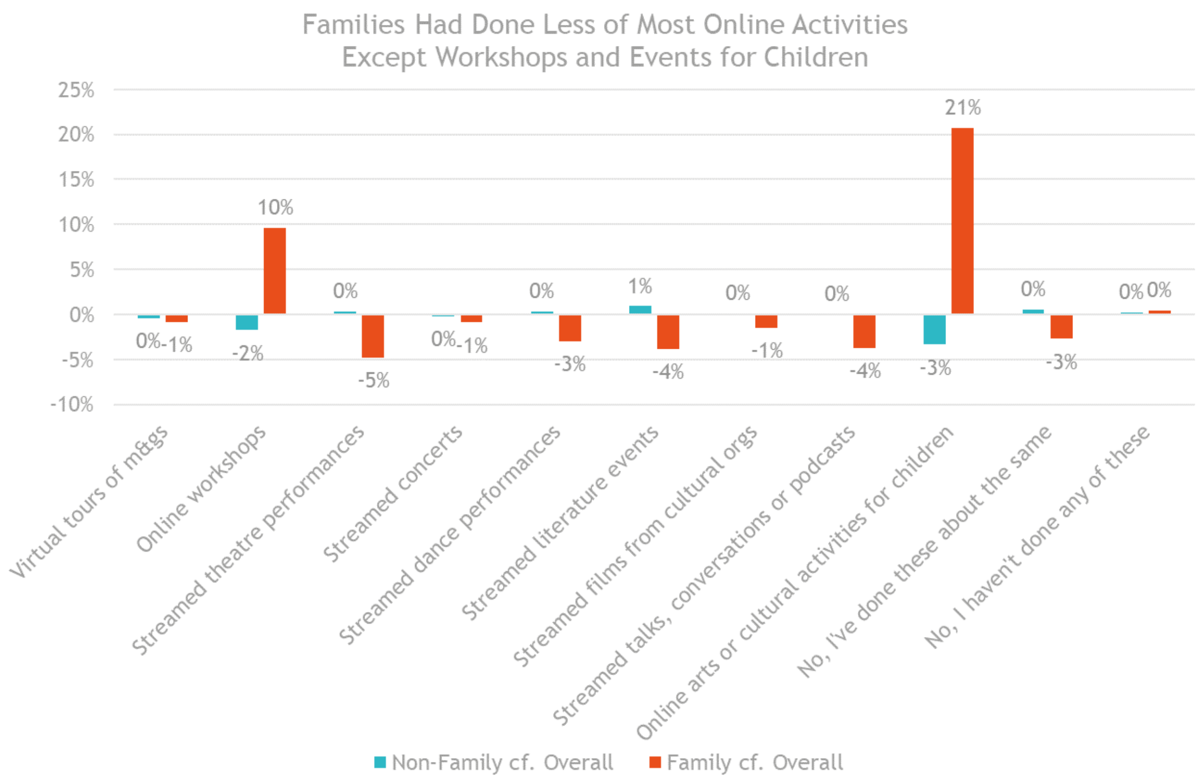


Fig. 3: Base: 2,520 / 381 / M.o.E: ±2% / ±5%

Higher-engaged Audience Spectrum groups are particularly likely to have listened to streamed talks, conversations or podcasts' (52%, cf. 27% and 30% for medium and lower-engaged groups respectively), as were urban rather than rural audiences (38% vs 28%).

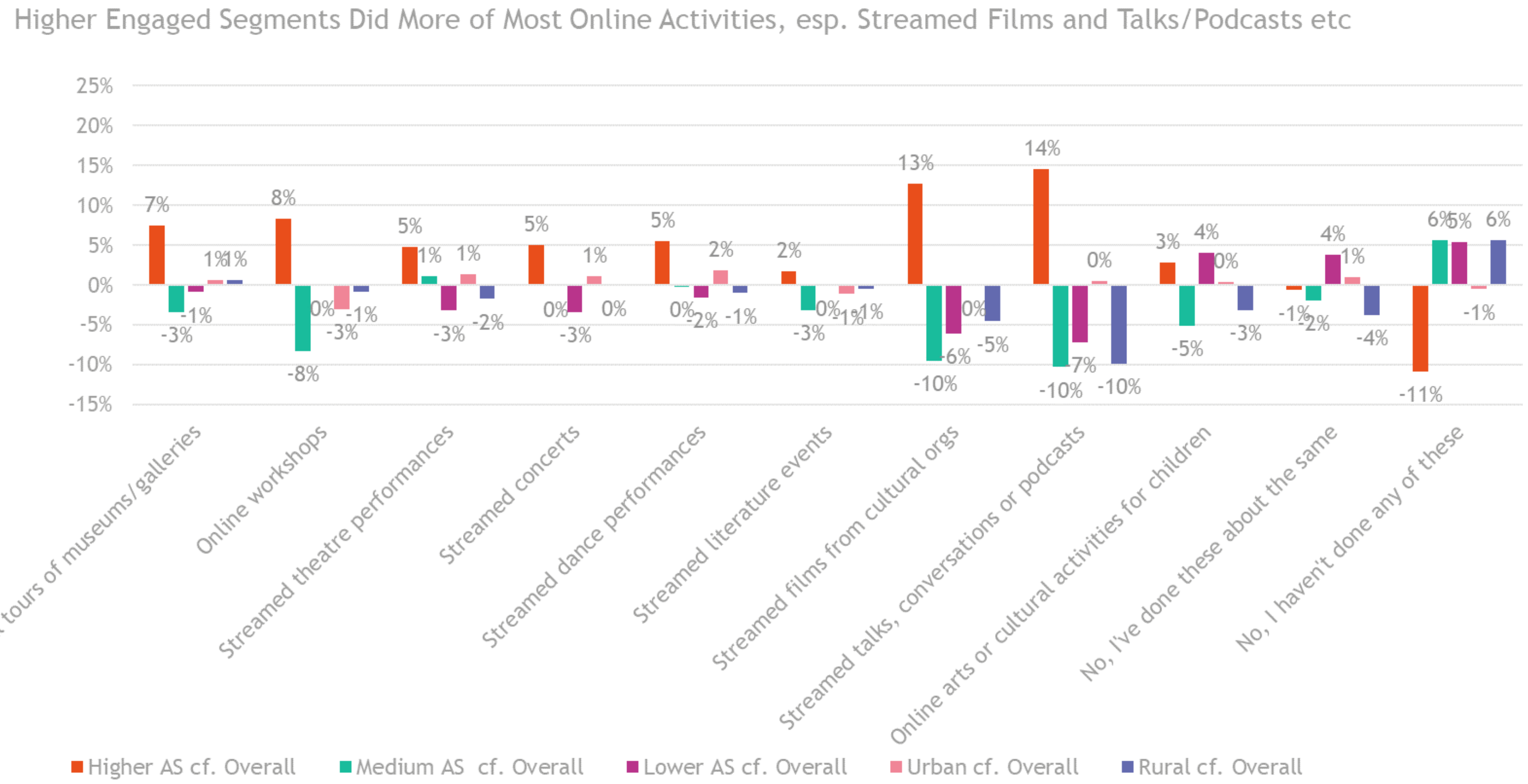


Fig. 4: Base: 726 / 861 / 357 / 1,415 / 583 / M.o.E: ±4% / ±3% / ±5% / ±3% / ±4%

Middle-aged audiences were most likely to have paid for fixed-price content (40% cf. 33% overall) and both they and younger audiences were most likely to have made a donation (38% and 39%, cf. 35% overall). Older audiences were more likely to have paid for something by virtue of it being included in a membership (13% cf. 10% overall).

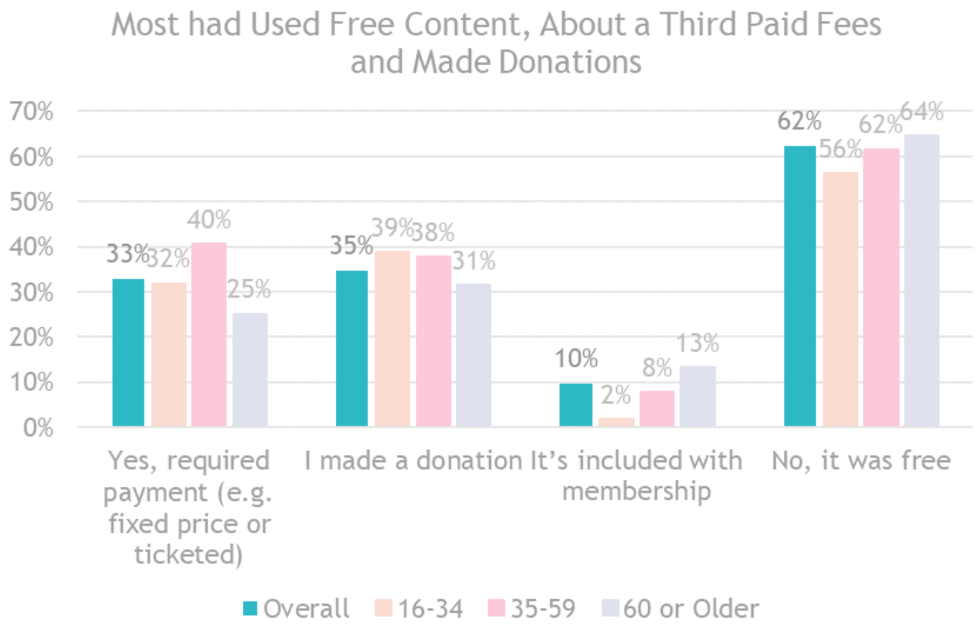


Fig. 5: Base: 1,915 / 189 / 852 / 797 / M.o.E: ±2% / ±7% / ±3% / ±3%

Potential Audience in the Future

To understand which audiences were currently willing to attend (and conversely who, on balance, probably weren't) we combined the results of two questions: those who had *already* attended since lockdown and those who said that they would be prepared to attend or book 'straight away' for something that they were interested in. We have described these as 'in play' audiences.

Overall, 40% of respondents were 'in play' on this definition (rising to 64% of visual arts attenders, likely higher because visual arts venues have been open, giving greater opportunity to fit the definition):

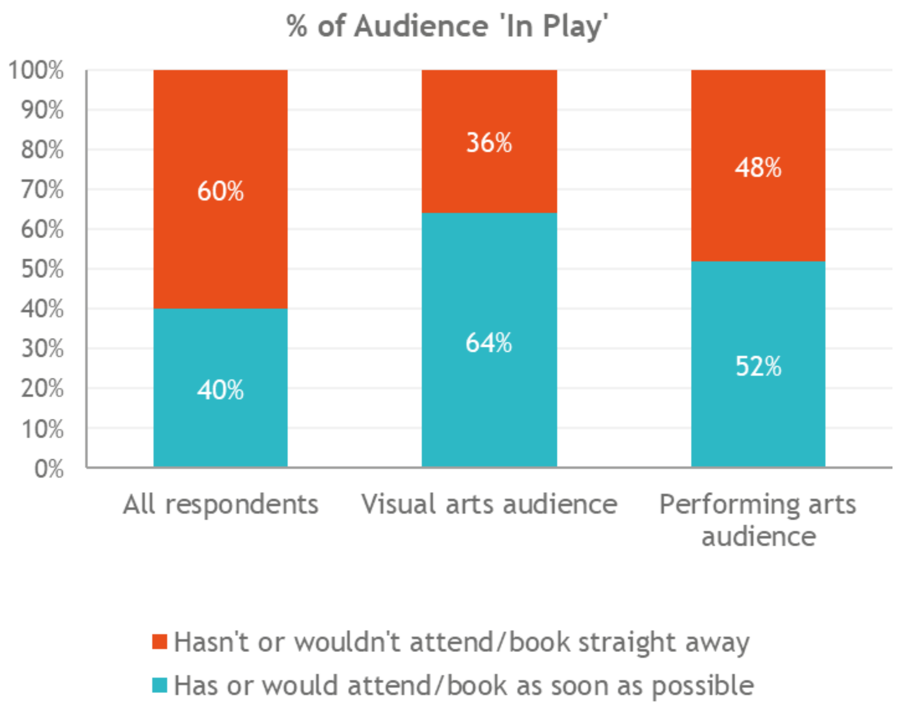


Fig. 6: Base: 3,609 / 1,201 / 552 / M.o.E: ±2% / ±3% / ±4%

There was little difference between audiences from rural and urban areas overall, (45% and 43% respectively) but there were marked differences by Audience Spectrum profile, with Commuterland Culturebuffs and Home & Heritage particularly unlikely to be 'in play', compared to Trips & Treats, for example. Audience Spectrum definitions are set out in Appendix 2 of this document.

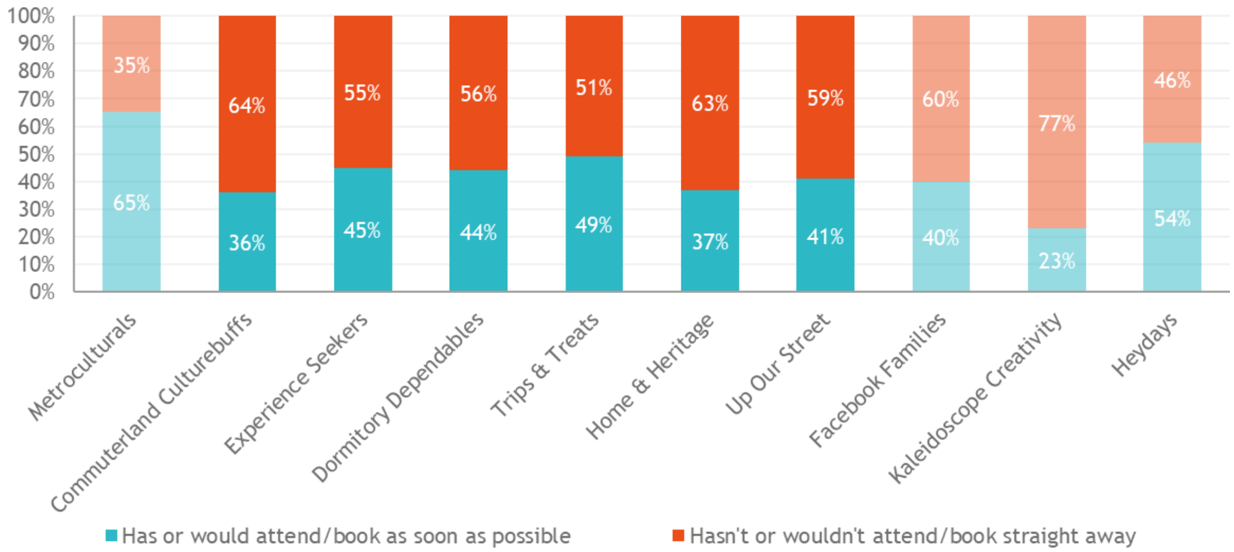


Fig. 7: Base: 135 / 206 / 365 / 371 / 163 / 304 / 134 / 44 / 71 / 95

M.o.E: ±8% / ±7% / ±5% / ±5% /±8% / ±5% /±8% / ±14% /±10% / ±10%

There is also some indication that the proportion of 'in play' audiences dips among those who are middle-aged, with only 26% of 45-49 year olds, less than half the proportion of 35-39 year olds (59%):

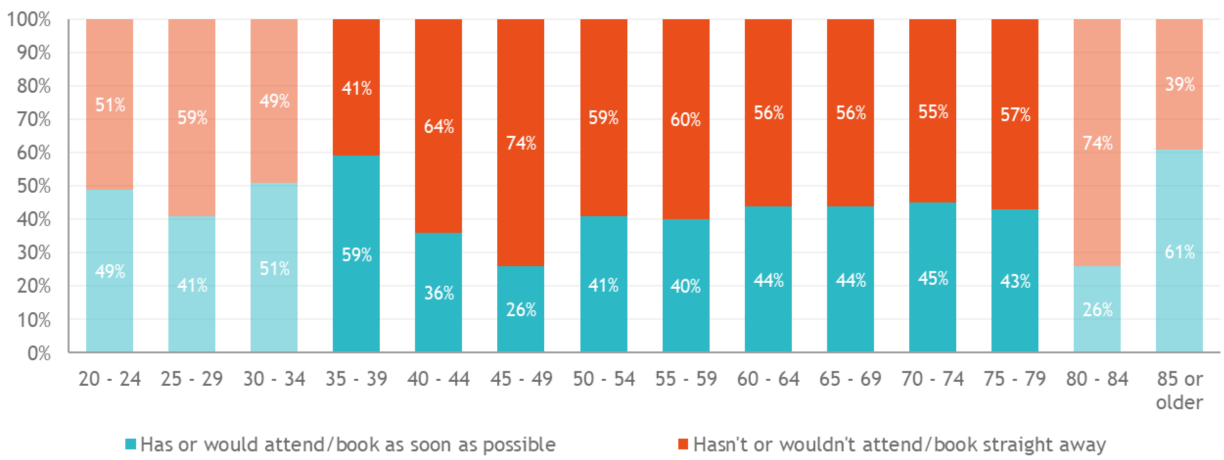


Fig. 8: Base: 16 / 127 / 101 / 239 / 220 / 199 / 316 / 254 / 400 / 357 / 308 / 165 / 36 / 13

M.o.E: ±24% / ±9% / ±10% / ±6% /±6% / ±6% /±5% / ±6% / ±5% / ±5% / ±6% / ±8% / ±14% /±27%

Future Attendance Behaviour

Half of respondents said that they were likely to attend about the same amount in future as they ever had, with a substantial 26% 'not sure' whether they'd attend the same amount, or more, or less: reflecting the widespread lack of certainty at the moment. The remaining 25% were three times as likely to say they would attend 'less' than 'more' (19% vs. 6%), implying a moderate ongoing contraction to average audience frequency.

In the following chart, 'not sure' responses are blanked out and split between the extremes, to show the balance of stated responses and to contrast those who would attend 'more' and 'less'. This also highlights that the difference between groups is a) largely about the differing levels which are unsure b) affected more by differences in the proportion who would attend 'less' rather than the fairly constant proportion who would attend 'more'.

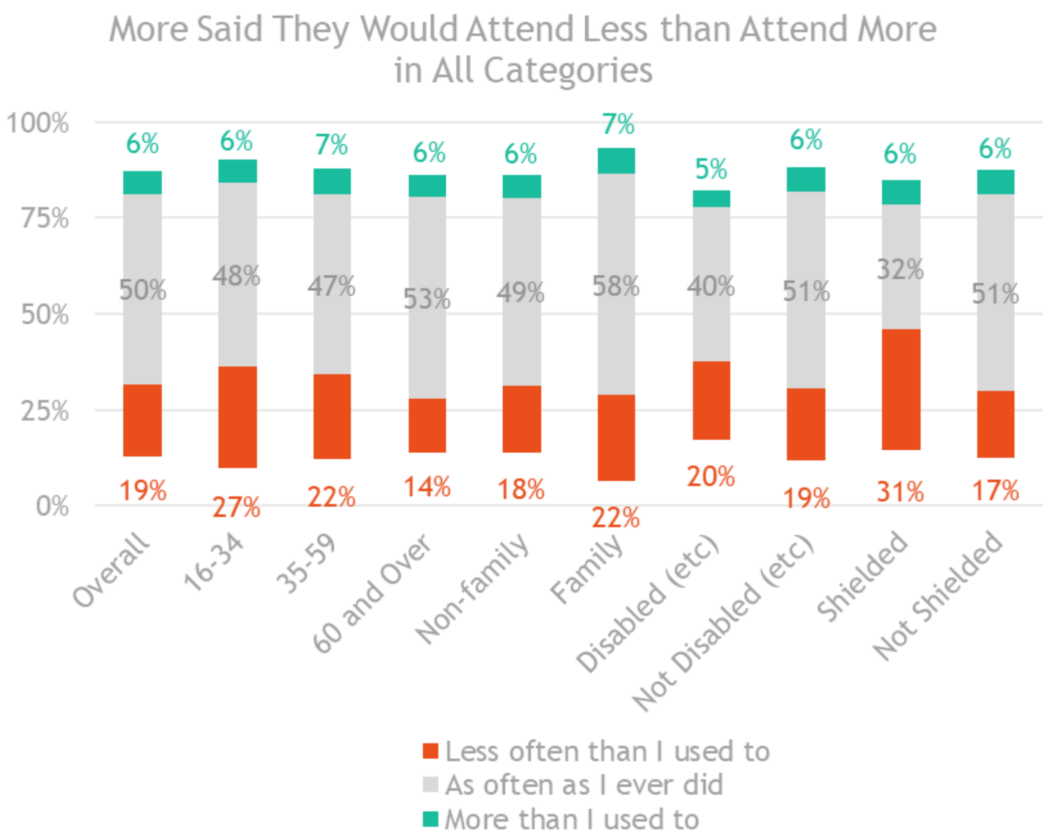


Fig. 9: Base: 3,395 / 252 / 1,242 / 1,303 / 2,514 / 376 / 331 / 2,468 / 185 / 2,670

M.o.E: ±2% / ±6% / ±3% / ±3% / ±2% / ±5% / ±5% / ±2% / ±7% / ±2%

This difference varied between those who had shielded and those who hadn't (31% 'less', 6% 'more' vs 17% and 6%); but also by age, with 27% of those 16-34 saying they'd attend ‘less’ but only 14% of over 60s. Pre-booking would make all of these groups more likely to attend.

Approximately 10% more of those with children or without disabilities expected to attend the same amount, with an equivalent proportion less ‘not sure’ (an effect even more pronounced for those who were shielding). Visual arts audiences were also more likely to say they would attend less.

Viewed by Audience Spectrum group, the key difference was the greater likelihood of Experience Seekers to expect a change in their behaviour (38% anticipating some kind of change), but particularly high proportions expecting to attend less (27%). Trips & Treats appear particularly likely to

be attending less rather than more. Groups with samples under 100 have been shaded out, since these samples are too small to draw conclusions. For more about Audience Spectrum groups, see https://www.theaudienceagency.org/audience-spectrum.

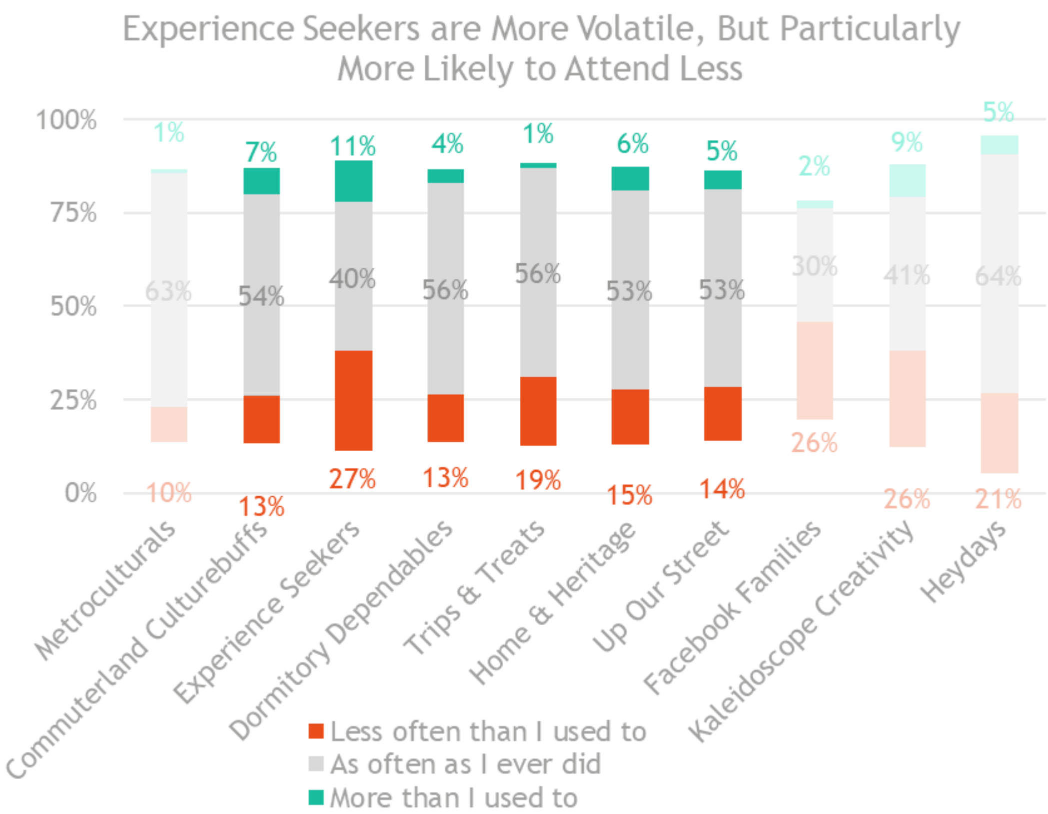


Fig. 10: Base: 126 / 219 / 359 / 380 / 161 / 316 / 138 / 46 / 70 / 94

M.o.E: ±8% / ±7% / ±5% / ±5% / ±8% / ±6% / ±8% / ±14% / ±12% / ±10%

In line with these expectations, more respondents also expected to do specific activities on-site less rather than more:

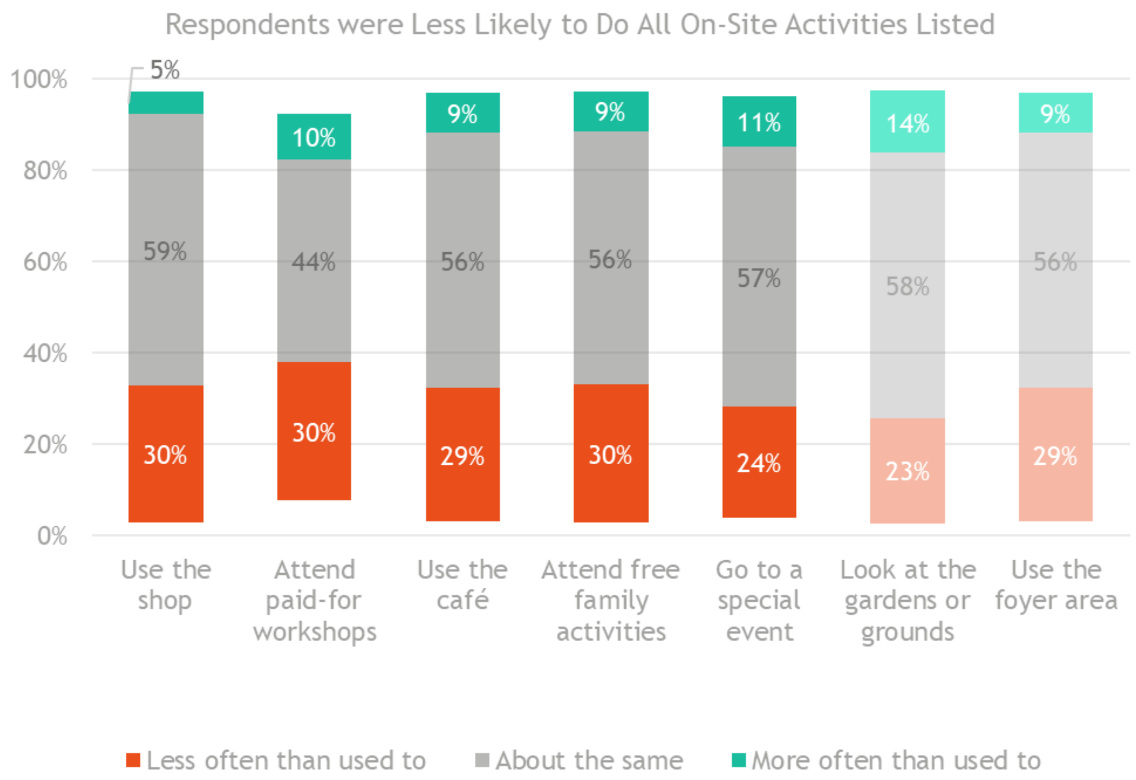


Fig. 11: Base: 1,457 / 274 / 1,495 / 162 / 707 / 1,089 / 348

M.o.E: ±3% / ±6% / ±3% / ±5% / ±8% / ±4% / ±3% / ±5%

'Looking at the gardens and grounds' was only asked by Collective and Eden Court; 'Use the foyer area' was only asked by Eden Court and Wigtown Book Festival.

Specifically, when compared to overall usage over the past three years, usage of shops and paid-for workshops was expected to be lower than for cafés (and for gardens/grounds and foyers, although these were only asked by a couple of organisations):

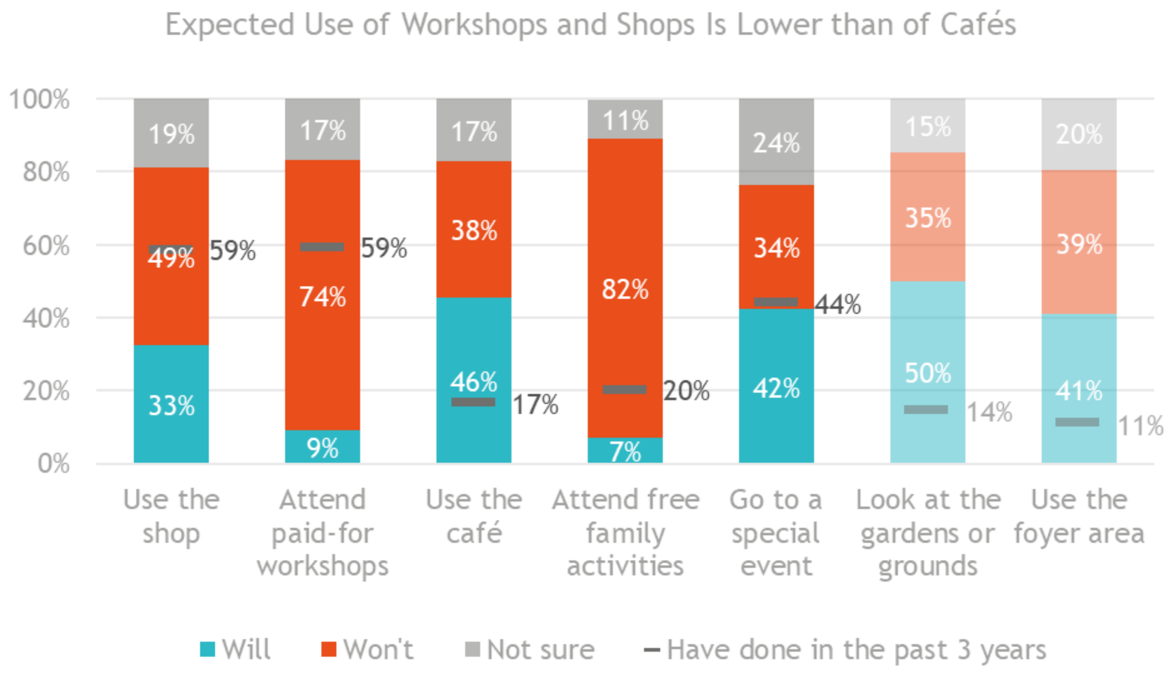


Fig. 12: Base: 1,368 / 1,628 / 1,197 / 1,438 / 1,129 / 260 / 122

M.o.E: ±3% / ±2% / ±3% / ±3% / ±3% / ±6% / ±8%

Overall, this suggests there could be substantial change in the ways that audiences engage with sites once they return.

Payment to Support Organisations

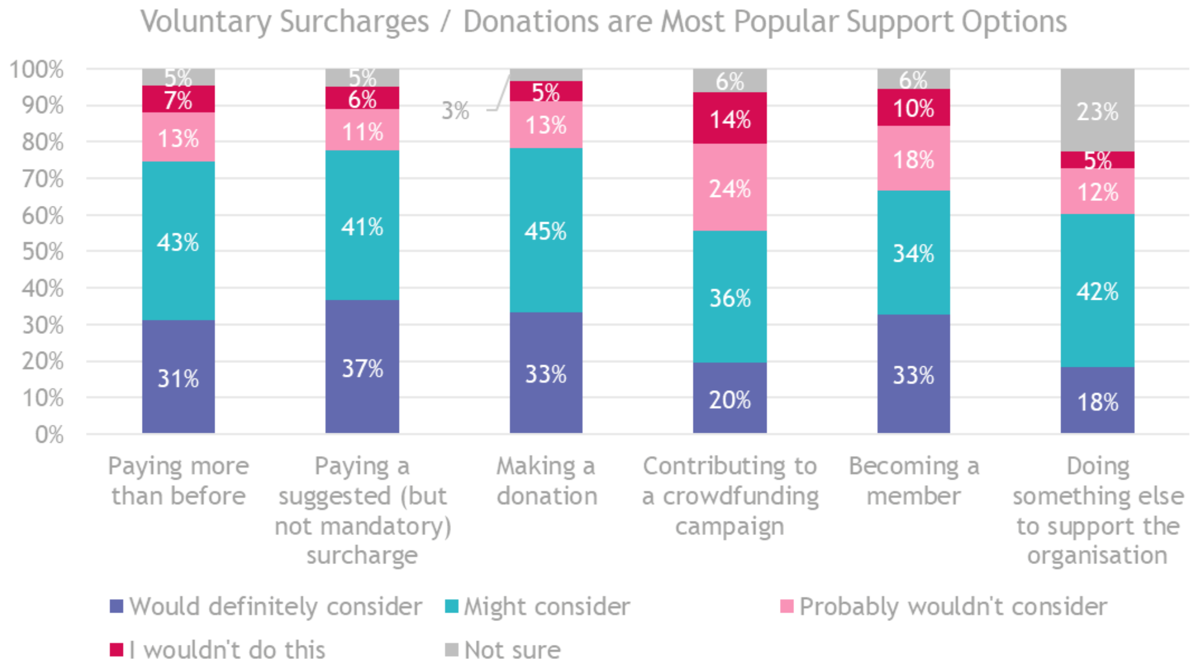


Fig. 13: Base: 2,900 / 2,814 / 2,791 / 2,591 / 2,490 / M.o.E: ±2% for all

The most popular approach to supporting organisations during COVID was through a suggested voluntary surcharge (78% 'definitely' or 'might' consider this; 37% and 41% respectively). Support for this was relatively even across audience types, but more popular with those who had shielded (46% 'definitely').

The next most popular approach to supporting organisations during COVID, with similar levels of support, was through a voluntary donation (78% 'definitely' or 'might' consider this; 33% and 45% respectively).

The third most popular approach was paying more than before, also supported by most respondents (74% 'definitely' or 'might'; 31% and 43% respectively). The proportion who 'definitely' would is higher for older age groups (37% of those 60+), those who have shielded (42%), visual arts audiences (41%) and those in rural areas (42%).

Other approaches were less popular (with 'definitely' or 'might' totalling 67% for memberships, 55% for crowdfunders, 60% for 'something else', although the former did have a notable 33% who would 'definitely' consider memberships, which is promising, given the commitment this suggests). It would be useful to explore in more detail the types of membership that audiences would support (e.g. discount schemes, enhanced access/benefits, charitably-motivated etc).

The charts on the next three pages show the variation by type of support for some key characteristics of respondents, with differences of >3% points from overall highlighted:

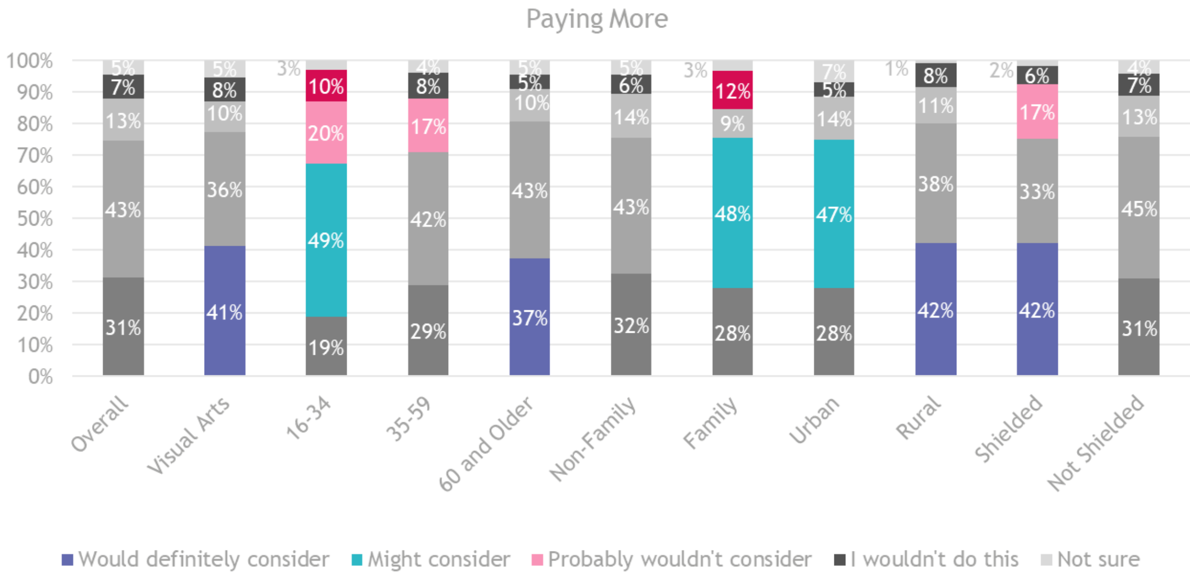


Fig. 14: Base: 2,900 / 468 / 239 / 1,206 / 1,188 / 2,370 / 351 / 1,317 / 544 / 173 / 2,519

M.o.E: ±2% / ±4% / ±6% / ±3% / ±3% / ±2% / ±5% / ±3% / ±4% / ±7% / ±2%

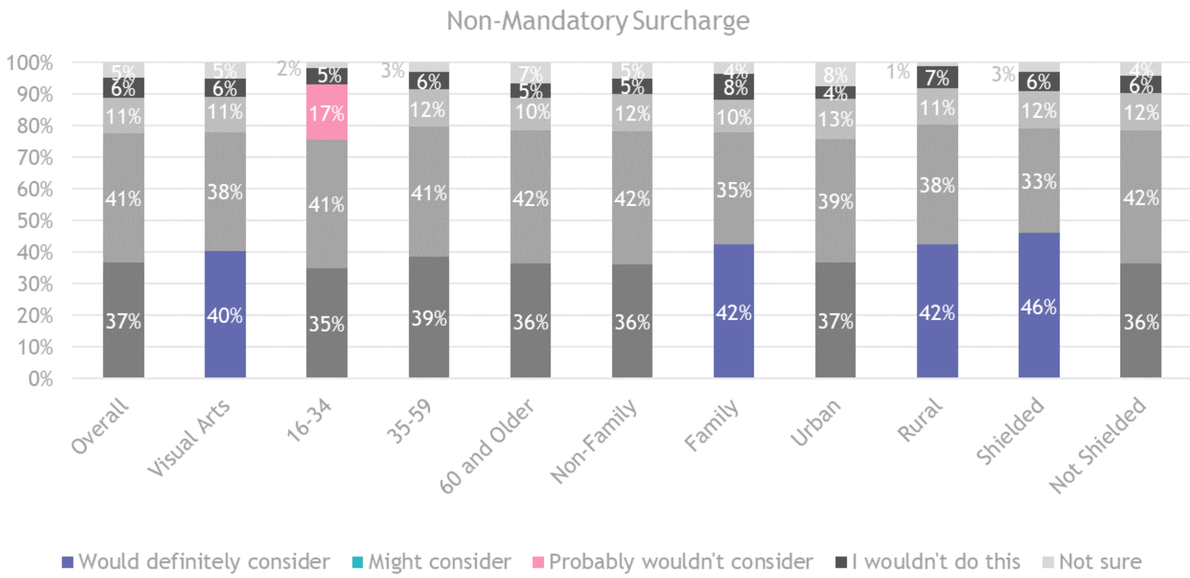


Fig. 15: Base: 2,814 / 445 / 229 / 1,202 / 1,125 / 2,279 / 364 / 1,291 / 516 / 168 / 2,449

M.o.E: 2% / ±5% / ±6% / ±3% / ±3% / ±2% / ±5% / ±3% / ±4% / ±8% / ±2%

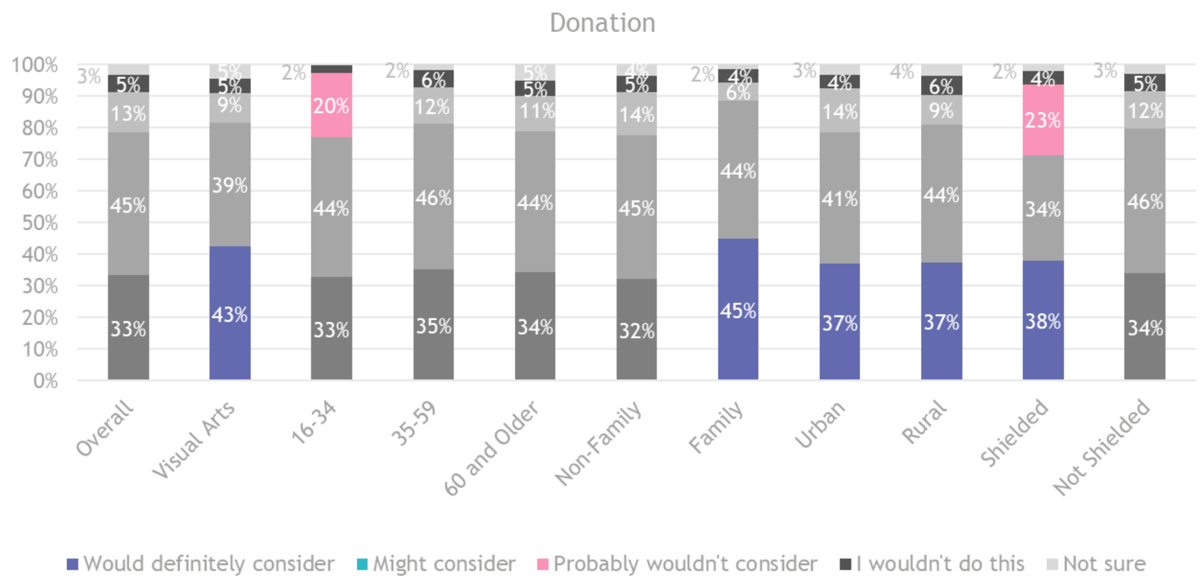


Fig. 16: Base: 2,791 / 460 / 248 / 1,188 / 1,108 / 2,256 / 362 / 173 / 2,419 / 1,294 / 509

M.o.E: 2% / ±5% / ±6% / ±3% / ±3% / ±2% / ±5% / ±3% / ±4% / ±7% / ±2%

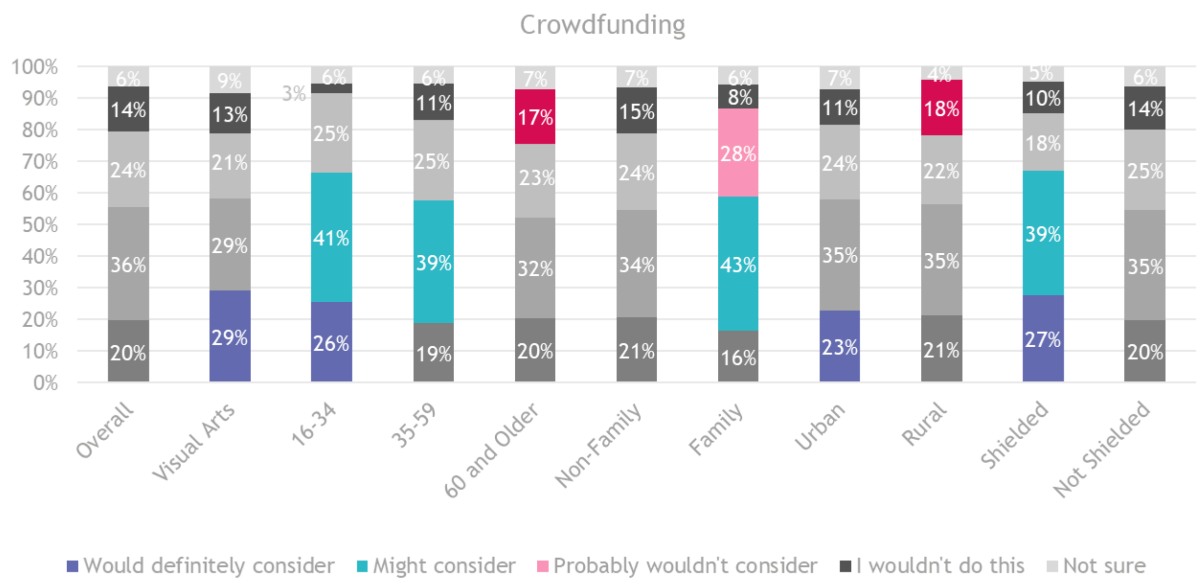


Fig. 17: Base: 2,597 / 431 / 235 / 1,135 / 993 / 2,094 / 347 / 1,199 / 468 / 168 / 2,249

M.o.E: 2% / ±4% / ±6% / ±3% / ±3% / ±2% / ±5% / ±3% / ±4% / ±7% / ±2%

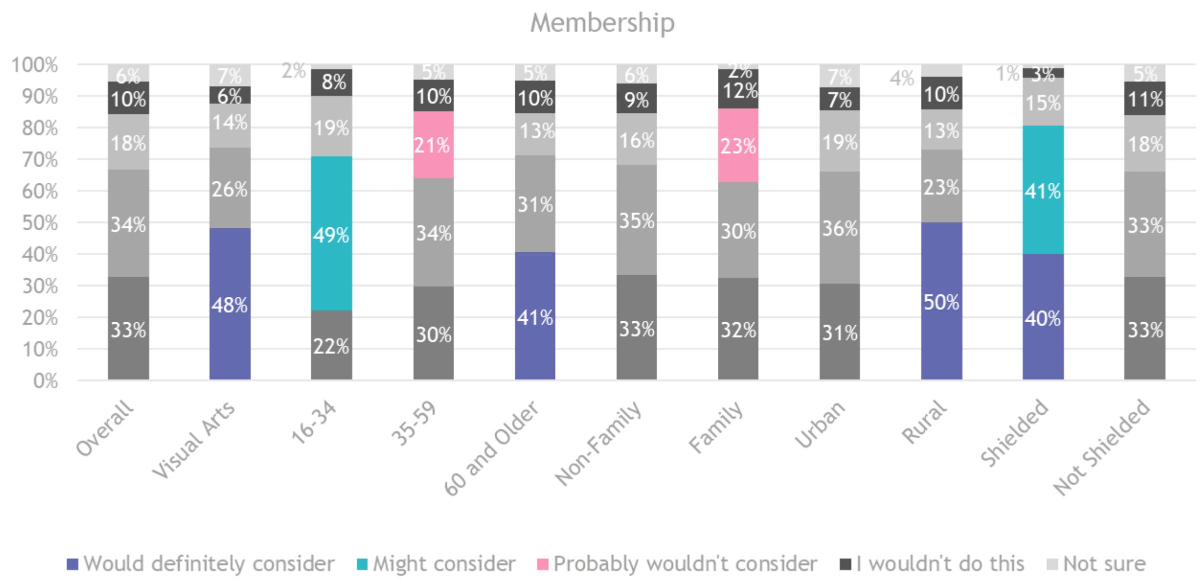


Fig. 18: Base: 2,591 / 406 / 236 / 1,135 / 977 / 2,057 / 355 / 165 / 2,223 / 1,208 / 442

M.o.E: 2% / ±5% / ±6% / ±3% / ±3% / ±2% / ±5% / ±3% / ±5 % / ±7% / ±2%

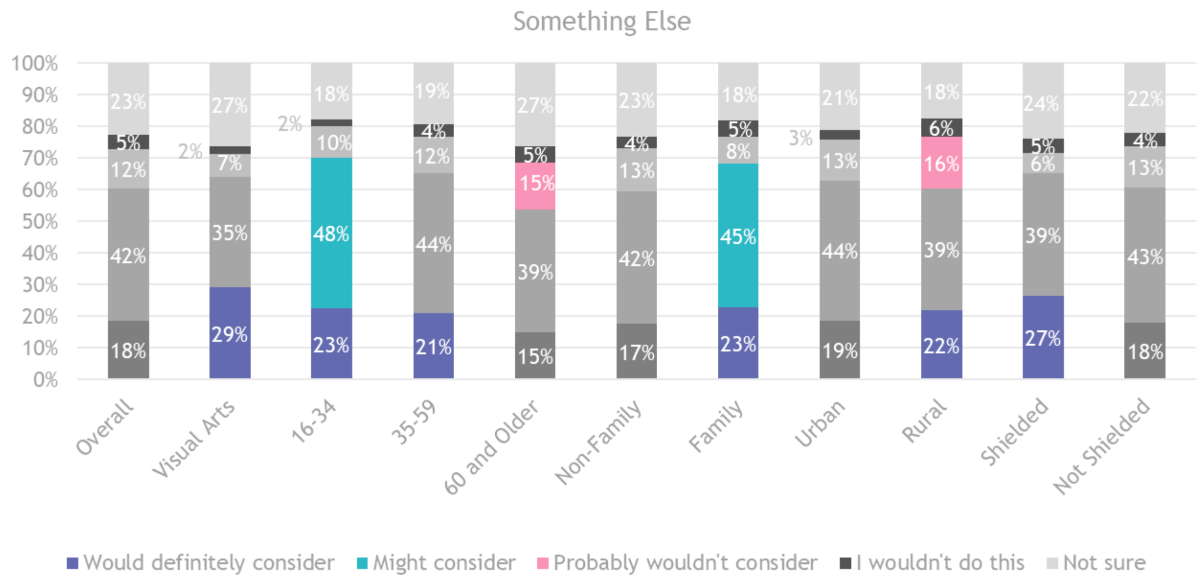


Fig. 19: Base: 2,490 / 411 / 213 / 1,147 / 905 / 1,984 / 353 / 1,166 / 428 / 154 / 2,154

M.o.E: 2% / ±5% / ±7% / ±3% / ±3% / ±2% / ±5% / ±3% / ±5% / ±8% / ±2%

Motivations

After lockdown, visitors had a particular blend of motivations: ‘supporting the organisation’ was the most-cited reason (76%), with ‘re-immersing myself’ and ‘getting back to normal’ next (50% and 46%): only then followed by the specific product (43%). Other responses specific to that moment (‘getting out of the house’, ‘celebrating the end of lockdown’, ‘reflecting on the impact of the last 6 months’ etc) also featured in the top three reasons for at least 10% or respondents.

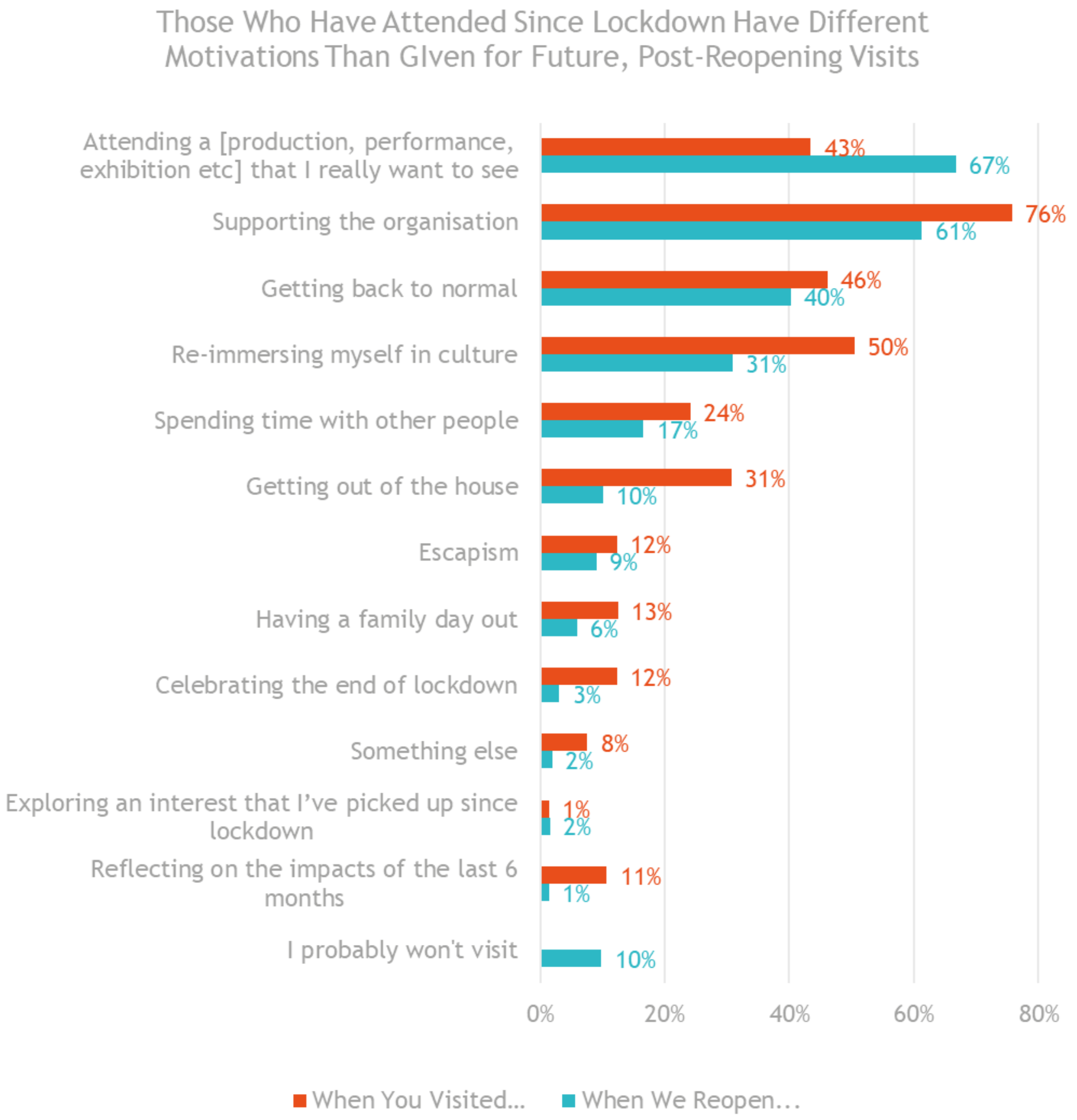


Fig. 20: Base: 486 / 1,709 / M.o.E: ±4% / ±2%

This isn’t expected to stay the same, with the predominant important of *what* people are going to see reasserting itself. Hence the most important motivation for future attendance was the particular product (67%), only then followed by ‘supporting the organisation’

(61%), 'getting back to normal' (40%) and 're-immersing myself in culture' (31%). For families, a 'family day out' (28%) was also important.

'Having a communal experience' was next highest (17%), but more important for visual arts audiences (25%) and 16-34 year olds (22% - who were also particularly motivated by 'getting out of the house' with 19%, cf. to an average of 10%).

For Future Visits, Older Audiences are More Motivated by Getting Back to Normal, Younger Ones by Getting out of the House, Escapism and Reimmersion in Culture

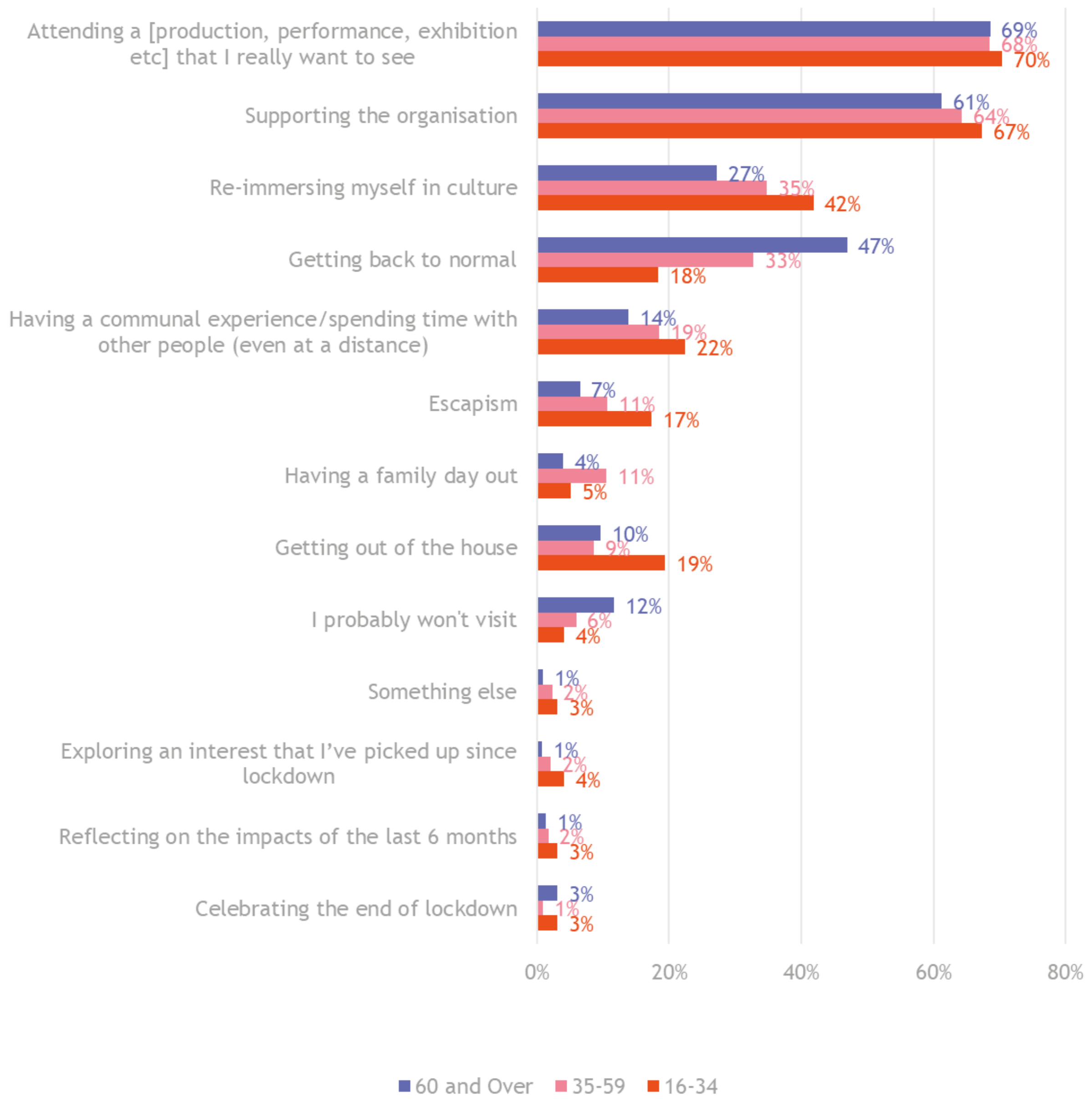


Fig. 21: Base: 859 / 523 / 98 / M.o.E: ±3% / ±4% / ±9%

It's a similar picture by age for those attending since lockdown, although note the small sample (n=97):

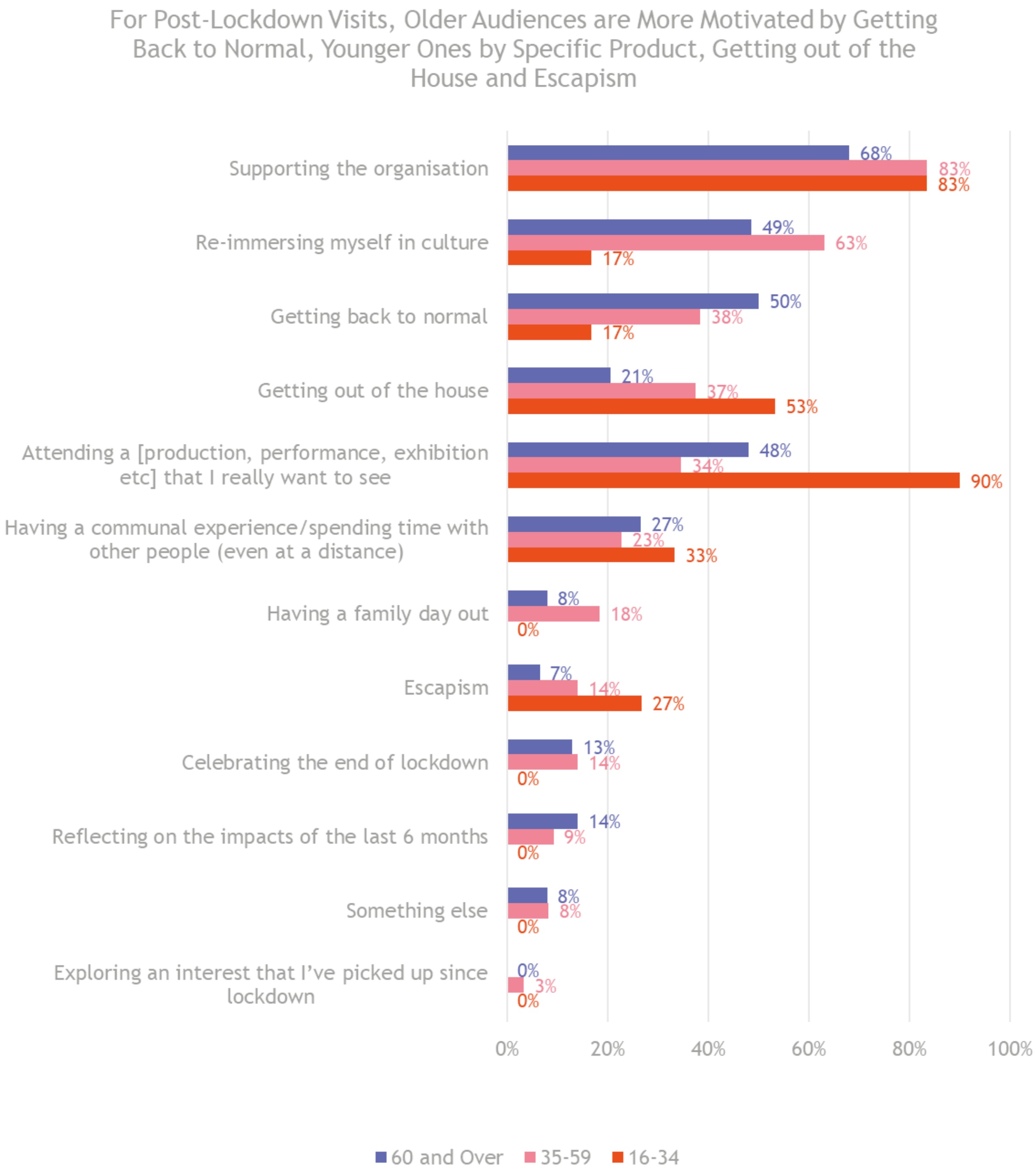


Fig. 22: Base: 200 / 206 / 30 / M.o.E: ±6% / ±5% / ±11%

For visual art audiences, supporting the organisation is consistently the most important motivation, but 'getting back to normal' was more important for post-lockdown visits, compared to other audiences.

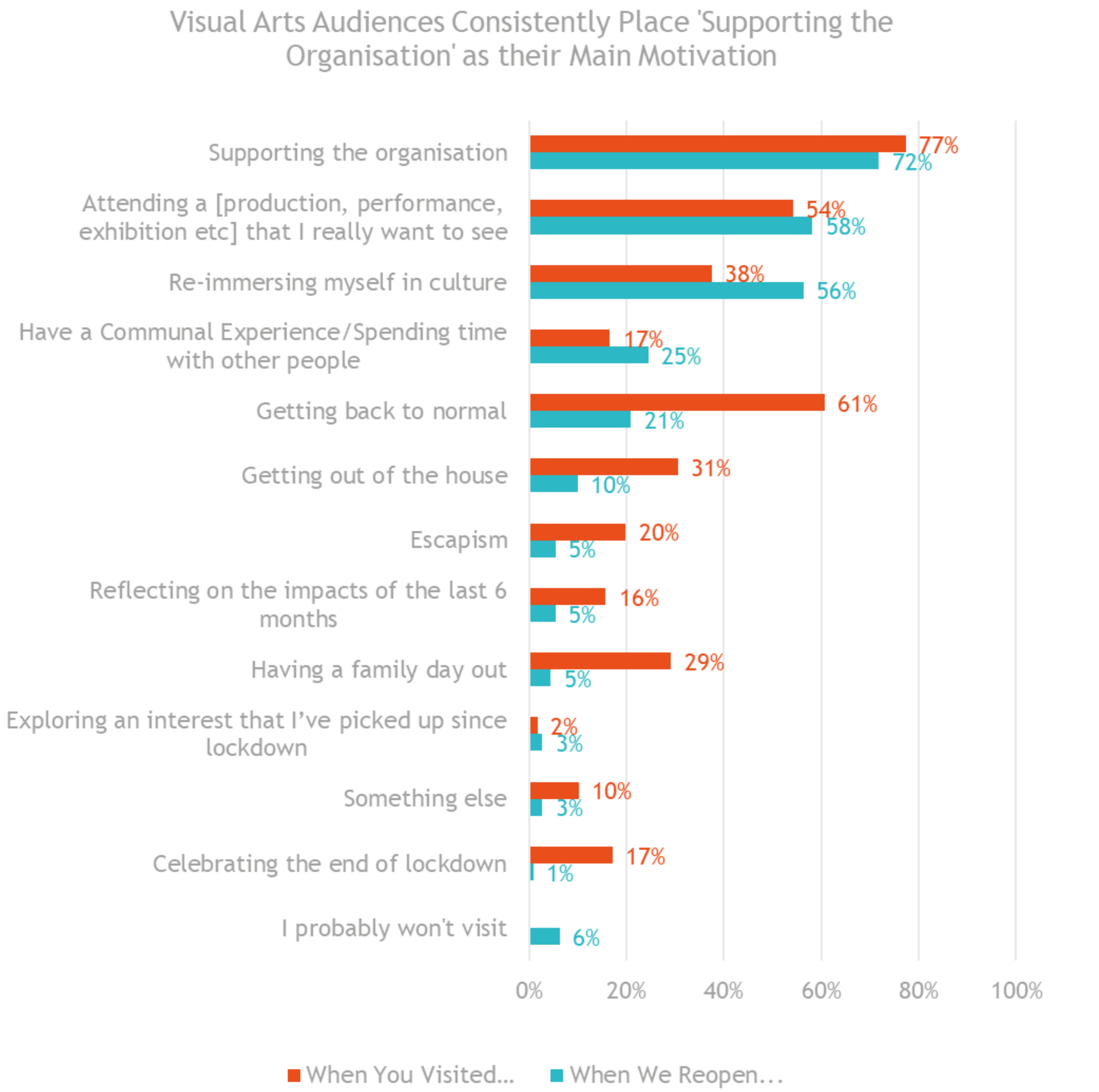


Fig. 23: Base: 216 / 110 / M.o.E: ±6% / ±8%

For performing arts audiences, attending a production/performance/exhibition was the priority once organisations reopen, and was also the second-highest motivation for those who have already visited. 'Getting back to normal' was less of a driver for those who had already visited than it was for visual arts audiences (since the attendance was less strongly part of their 'normal' attendance), but was therefore relatively more important for visits 'when we reopen'.

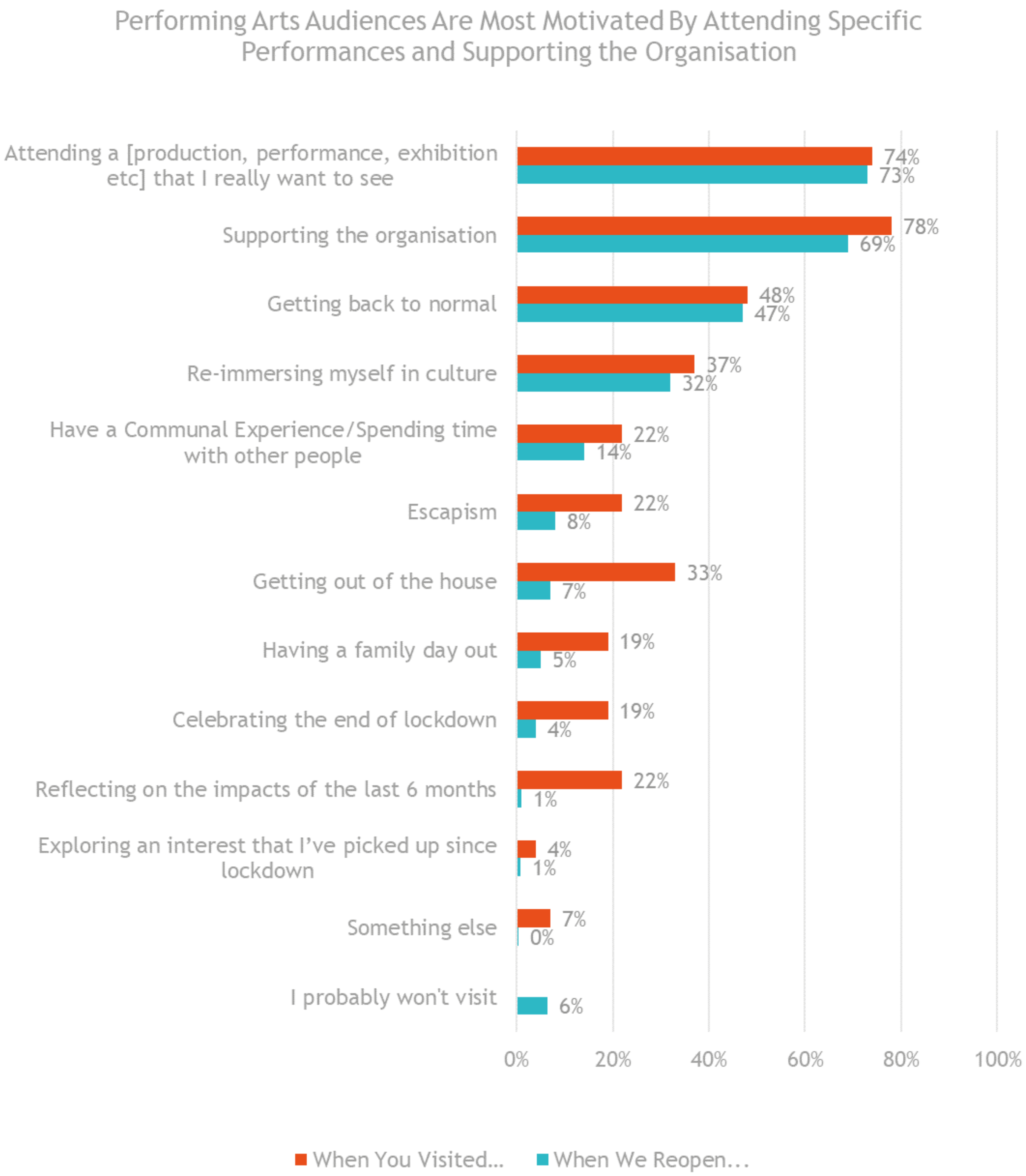


Fig. 24: Base: 117 / 776 / M.o.E: ±8% / ±3%

Barriers and Mitigations

Respondents were asked whether certain measures would make them more or less likely to attend (on a scale from 'much less' to 'much more'). All mitigations had a net positive impact, with more saying that they would encourage them to attend than discourage. The different responses can be summarised as follows (where blue is *total* 'more' vs 'less' and orange only shows '*much* more' and '*much* less' responses, key groups of mitigations are labelled A-E within each colour and described below):

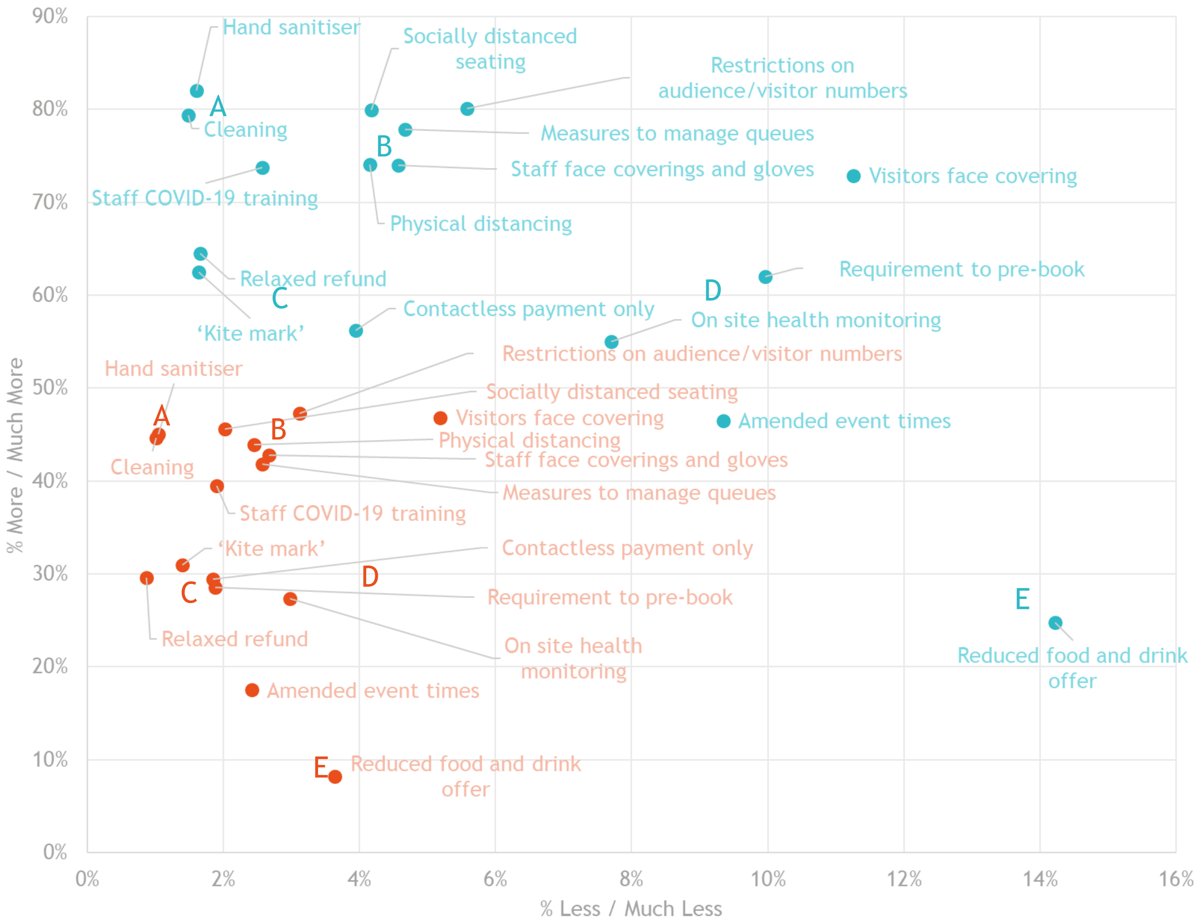


Fig. 25 : Bases : Hand sanitiser: 2,986 / Cleaning: 2,965 / Socially distanced seating: 2,972 / Restrictions on audience/visitor numbers: 3,046 / Measures to manage queues: 3,042 / Physical distancing: 3,061 / Staff face coverings and gloves: 3,000 / Staff COVID-19 training: 3,002 / Visitors face covering: 3,029 / Relaxed refund: 2,903 / 'Kite mark': 2,942 / Contactless payment only: 2,921 / Requirement to pre-book: 2,931 / On-site health monitoring: 2,921 / Amended event times: 2,857 / Reduced food and drink offer: 2,862

All M.o.E: ±2%

From the range of mitigations listed, there were five main groups:

A. Those that were widely rated as likely to encourage greater attendance (over 70% 'more likely'), with almost no respondents (under 3%) saying they would visit less often. These were: 'availability of hand sanitiser', 'reassurance about cleaning' and 'staff COVID training'. There is little reason not to implement these from an audience perspective, with the first two particularly important.
B. Those that are have similarly high proportions saying that they would attend more, but with small proportions (c. 5-10%) saying that they would attend less as a result. These measures do often impact on audience experience (e.g. 'physical distancing', 'socially-distanced seating', 'measures to manage queuing', 'staff wearing face masks', 'restrictions on audience/visitor numbers'). Given the overall benefit, these are likely to be widely advisable.
C. A third group had moderate proportions likely to attend more (55-64%) and no more than 4% saying that they would attend less: 'use of kite marks', 'relaxed refund policies' and 'contactless payment' (largely made up of a minority who said they would be 'much less likely').
D. A group of responses that have medium to high proportions (45-75%) saying that they would attend more, but where these generally rise along with the proportion who say that it would attend less (7-12%). These include 'visitors wearing masks' (the most divisive measure, scoring at the top of both brackets, followed by 'pre-booking events' [which was similar to 'amended event times', except that had fewer people who said they were more likely to attend as a result]). These measures are something of a trade-off, since — in general — the more people they encourage, the more they discourage. However, all but one have over half the audience more likely to attend and those who are less likely are mostly only 'slightly less likely' — they are acknowledged as inconveniences, rather than major barriers.
E. Finally, a reduced food and drink offer scarcely convinced a higher proportion to attend more than less (25% vs 14%) as wasn't important to many of either.

Thus, whilst some measures were clearly more important than others, a case could be made for almost all of them as benefitting potential attendance.

Visual Arts

For the analysis, we identified a group of 468 respondents who had attended an organisation which has visual arts as part of its programme (referred to as 'visual arts organisation(s)') and who said that they had attended visual arts at that organisation within the last three years. This group are referred to as 'visual arts audience(s)' within this report.

Most visual arts audiences had been recently and attended frequently (with 30% weekly or more):

95% of visual arts audiences had visited [organsation] in the last year

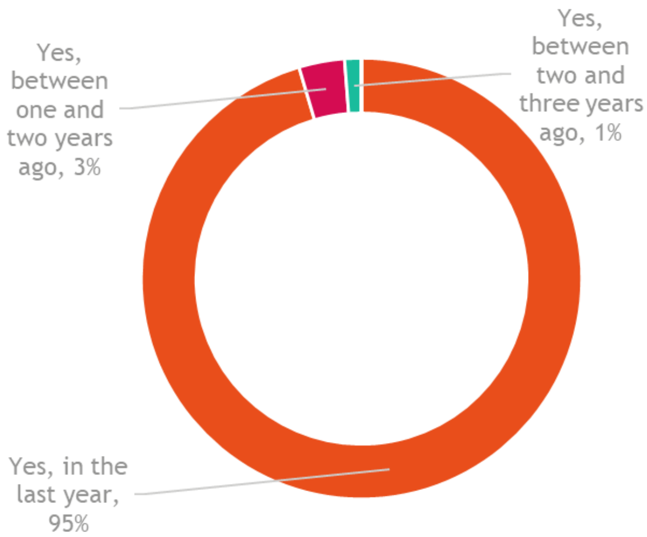


Fig. 26: Base: 442 / Margin of error: ±5%

Most have returned since lockdown (55%), though this should be understood in the context that 91% attended at least once every 3 or 4 months before lockdown.

55% of visual arts audiences have reattended since lockdown

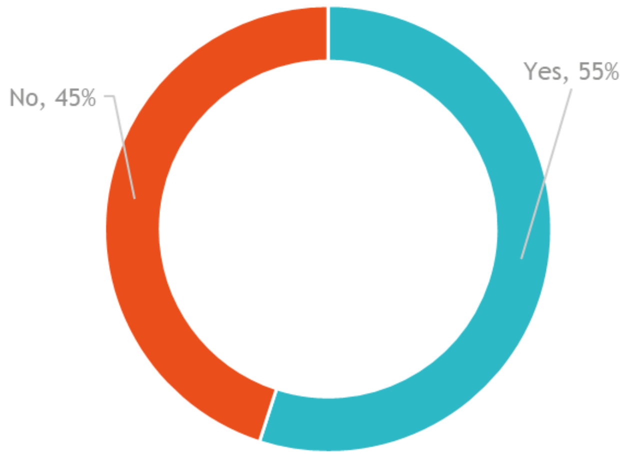


Fig. 27: Base: 243 / M.o.E: ±2%

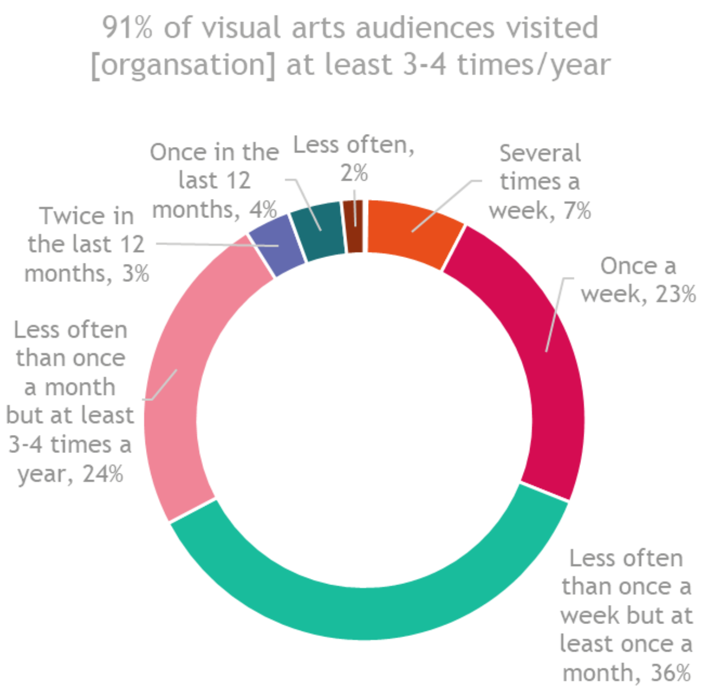


Fig. 28: Base: 325 / M.o.E: ±3%

Most of those had a positive experience ('72% very good', 23% 'good') and intend to return soon (80% 'as soon as possible' or 'within a week or two').

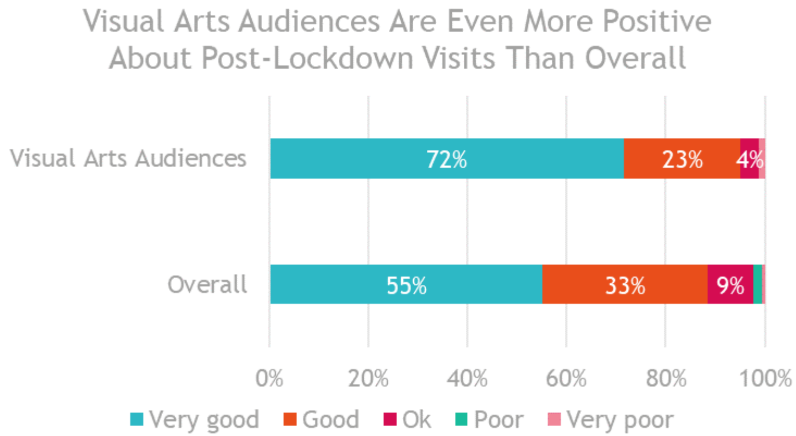


Fig. 29: Base: 239 / 544 / M.o.E: ±6% / ±4%

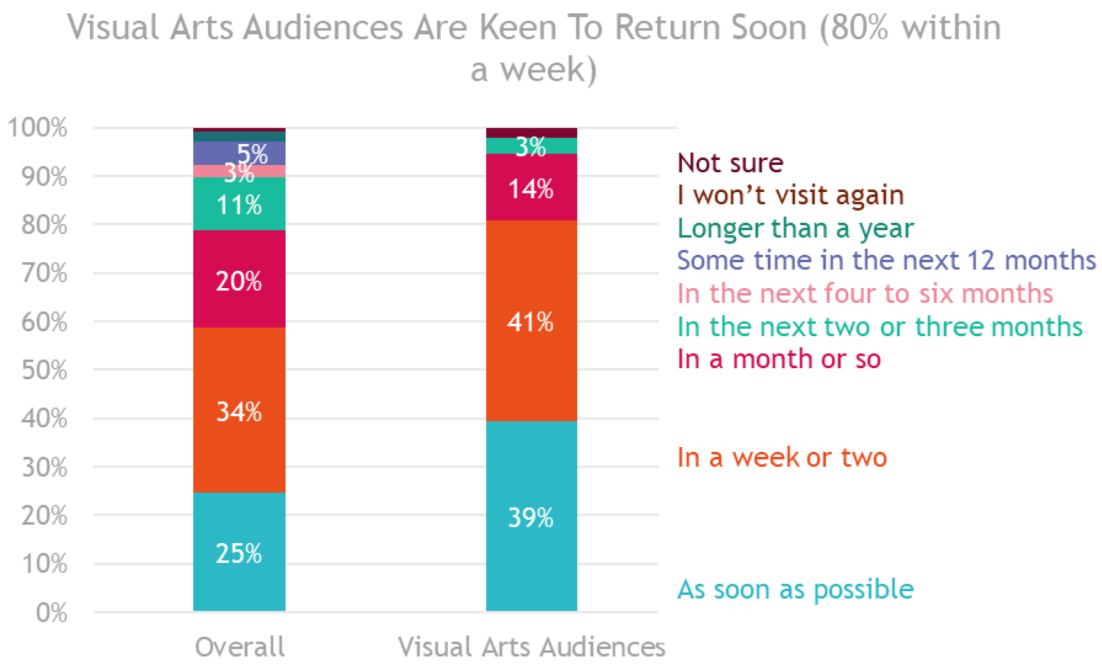


Fig. 30: Base: 223 / 508 / M.o.E: ±6% / ±4%

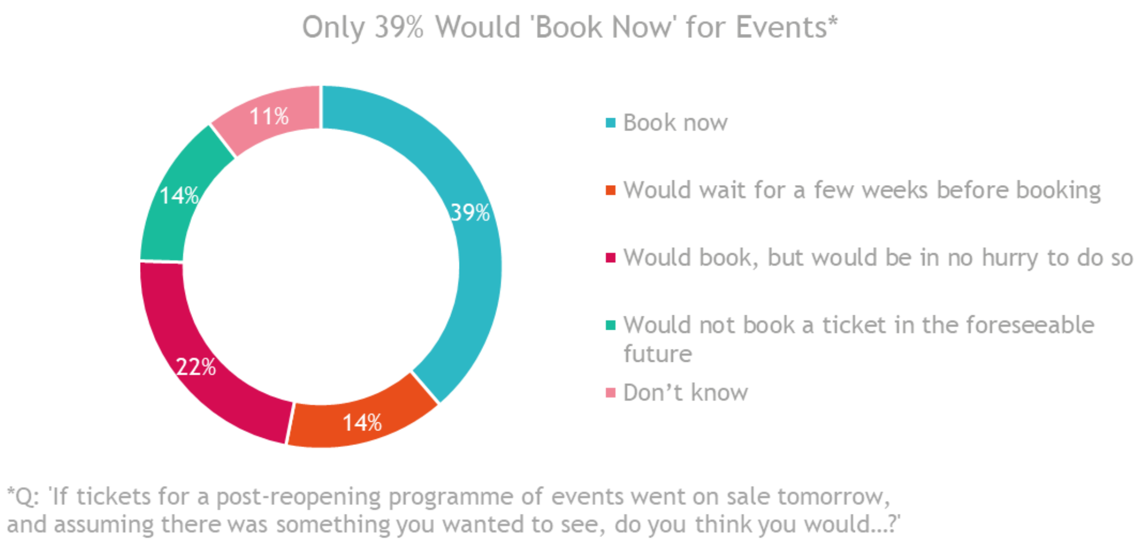


Fig. 31: Base: 438 / M.o.E: ±5%

Attitudes are mixed about reattending, however: when asked whether and when they 'would book if something they wanted to see went on sale tomorrow', 75% said they would, but only 39% 'now'.

The main reasons for waiting given by visual arts audiences were being worried about the number of people there (50%) or COVID-19 restrictions affecting quality of experience (48%). Just over 1 in 5 said they wanted to stay local at the moment.

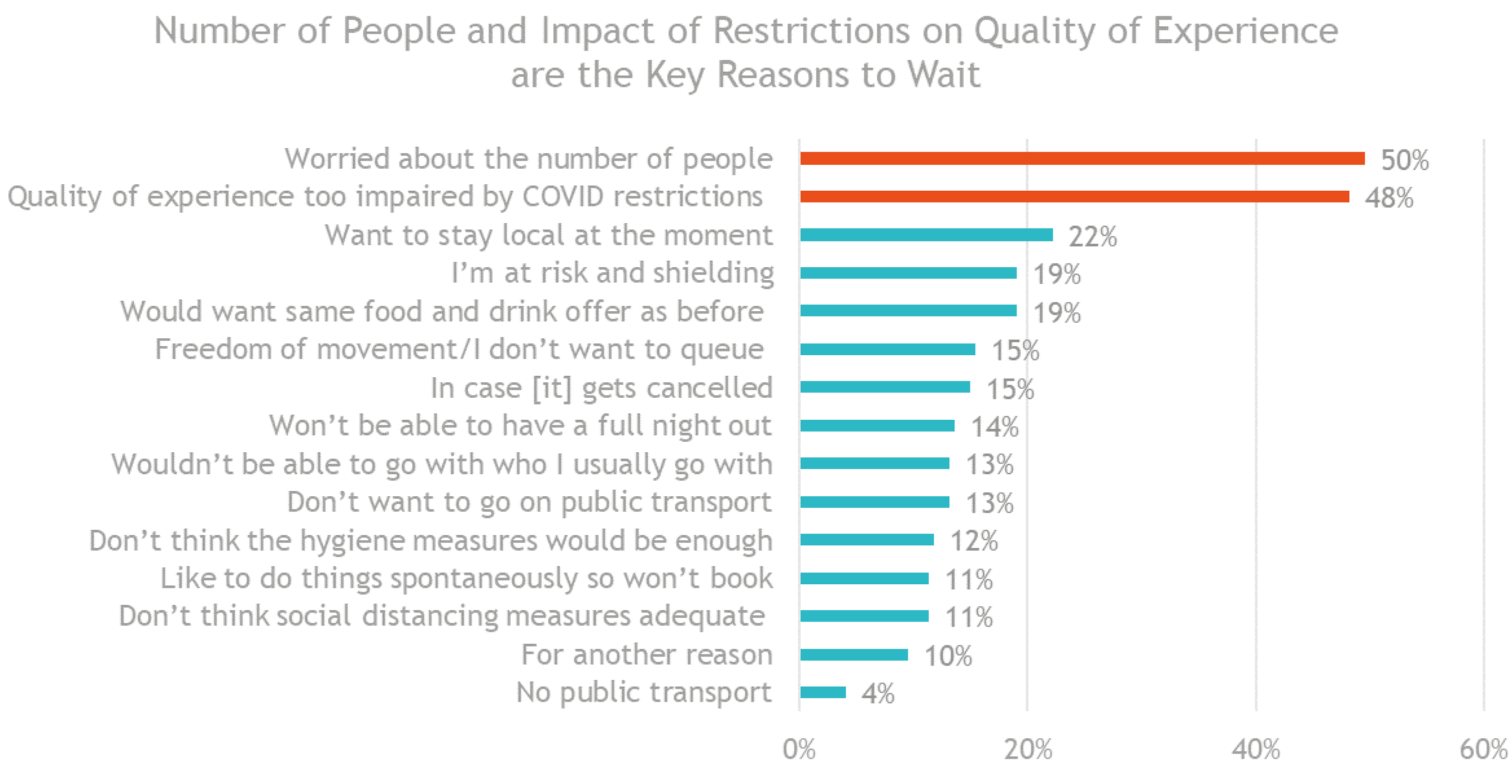


Fig. 32: Base: 220 / M.o.E: ±7%

This suggests that communicating about how measures have been put in place to cap numbers, or to illustrate that spaces are not crowded are likely to prove helpful in persuading potential attenders not to wait.

See the 'Motivations' section for more on Visual Arts Attenders' motivations.

Performing Arts

We identified a group of 2,292 respondents who had attended an organisation which has performing arts as part of its programme (referred to as ‘performing arts organisation(s)’) and who said that they had attended performing arts at that organisation within the last three years. This group are referred to as ‘performing arts audience(s)’ within this report.

Most performing arts audiences had been recently and attended frequently (with 53% monthly or more):

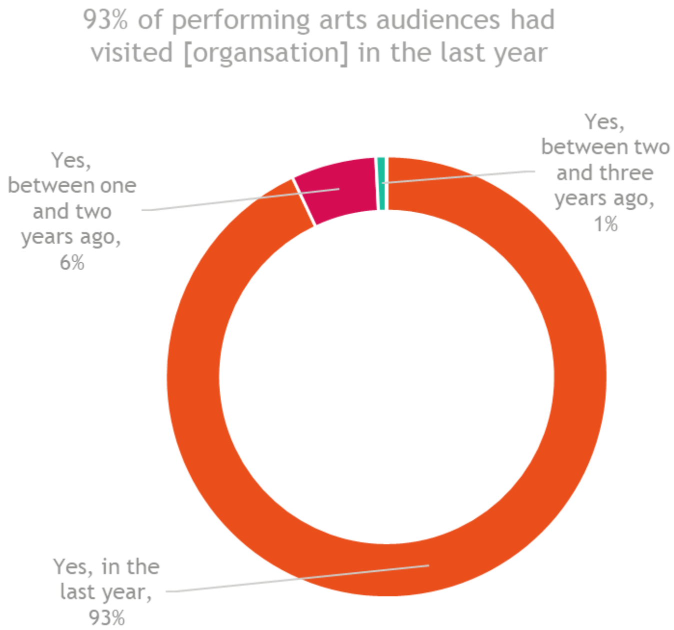


Fig. 33: Base: 1,283 / Margin of error: ±1%

34% have returned since lockdown, where 86% attended at least once every 3 or 4 months before lockdown.

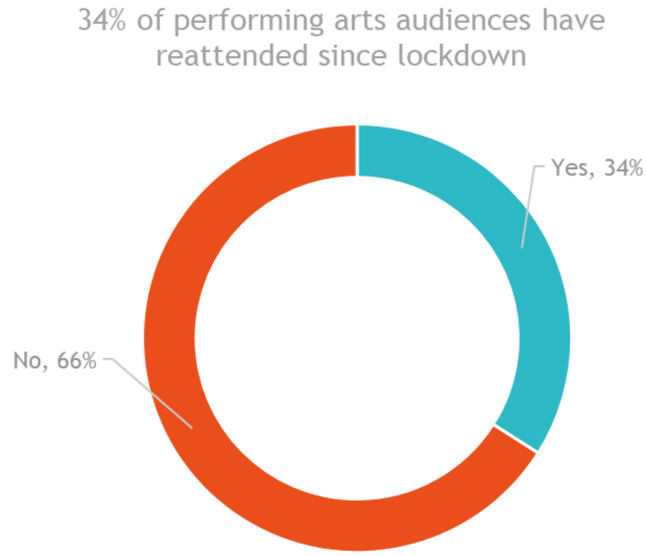


Fig. 34: Base: 420 / M.o.E: ±5%

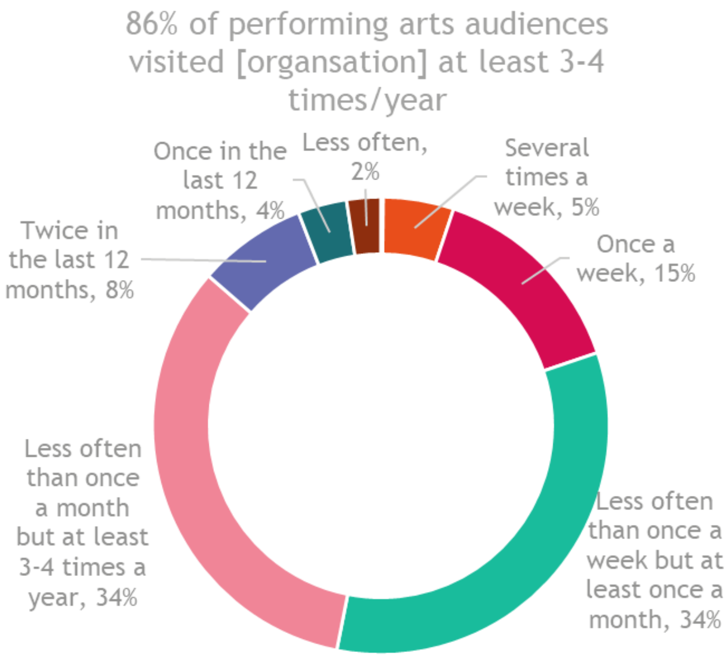


Fig. 35: Base: 1,241 / M.o.E: ±3%

Most of those had a positive experience ('63% very good', 31% 'good') and intend to return soon (90% 'as soon as possible' or 'within a week or two').

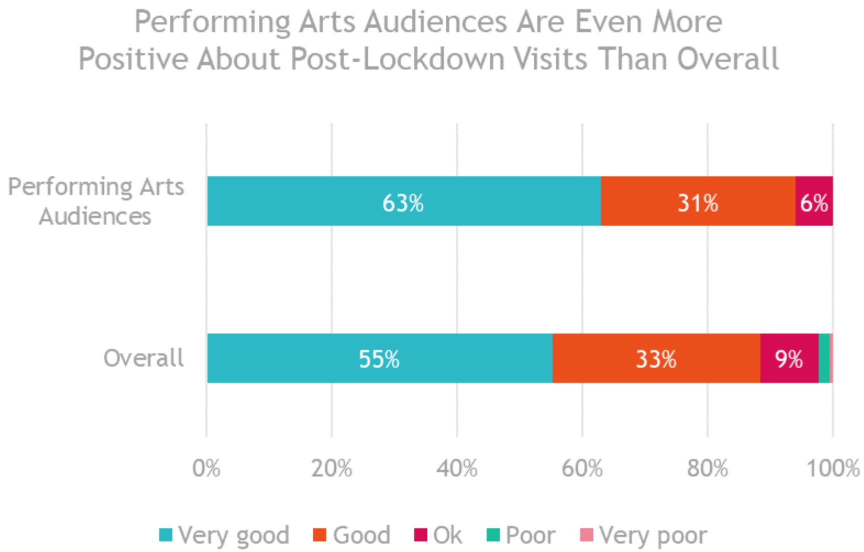


Fig. 36: Base: 139 / 544 / M.o.E: ±8% / ±4%

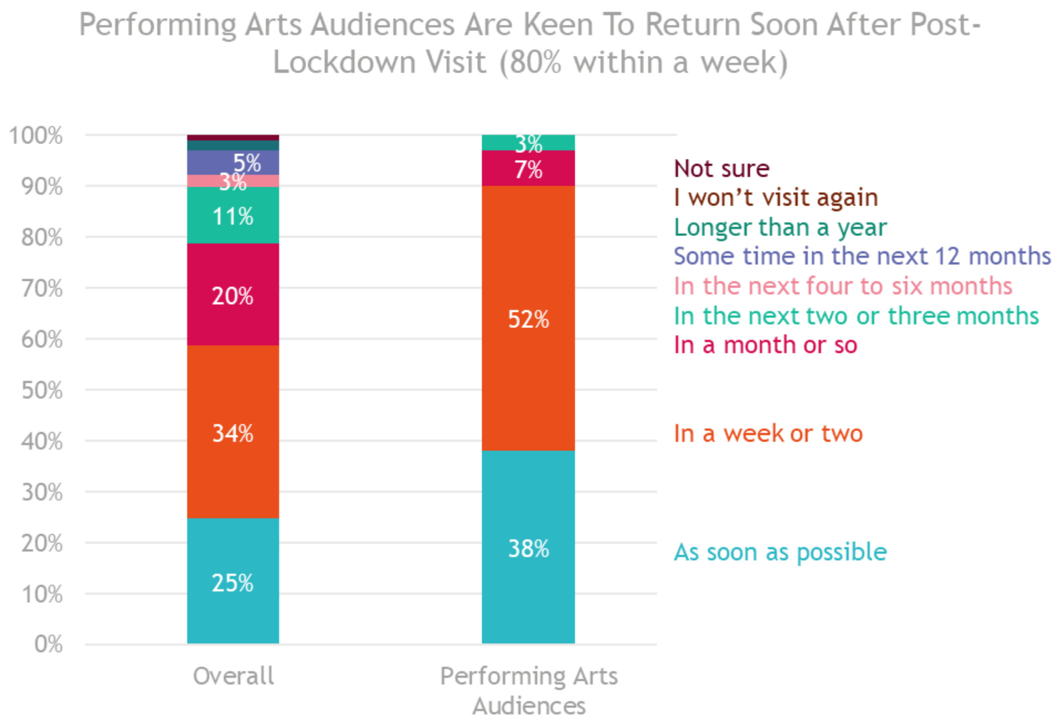
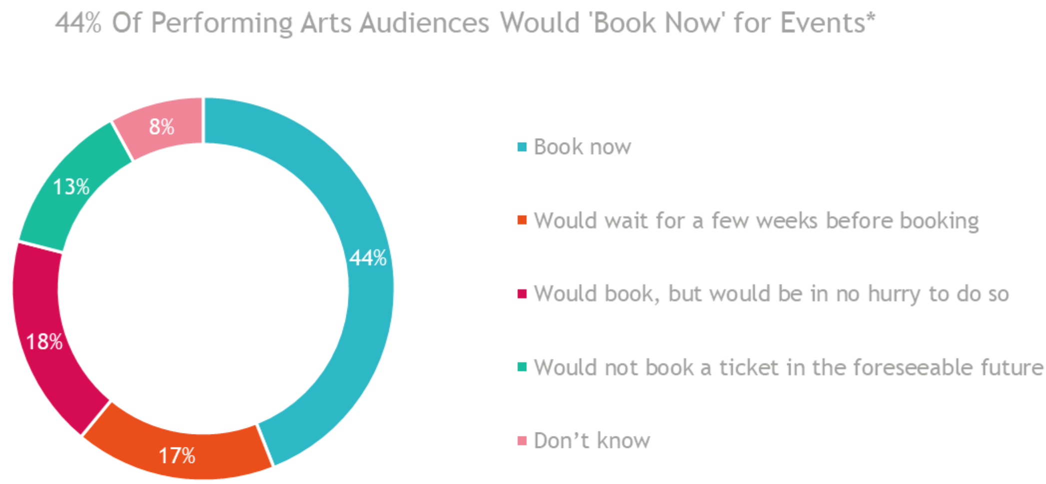


Fig. 37: Base: 126 / 508 / M.o.E: ±9% / ±4%



*Q: 'If tickets for a post-reopening programme of events went on sale tomorrow, and assuming there was something you wanted to see, do you think you would...?'

Fig. 38: Base: 1,260 / M.o.E: ±3%

Attitudes are mixed about reattending, however: when asked whether and when they 'would book if something they wanted to see went on sale tomorrow', 79% said they would, but only 44% 'now'.

The main reasons for waiting given by performing arts audiences were being worried about the number of people there (62%) or COVID-19 restrictions affecting quality of experience (48%). Just over 1 in 4 said they didn't think social distancing measures were adequate.

Number of People and Impact of Restrictions on Quality of Experience are the Key Reasons to Wait - Public Transport and Staying Local Much Less Of An Issue Compared To Overall

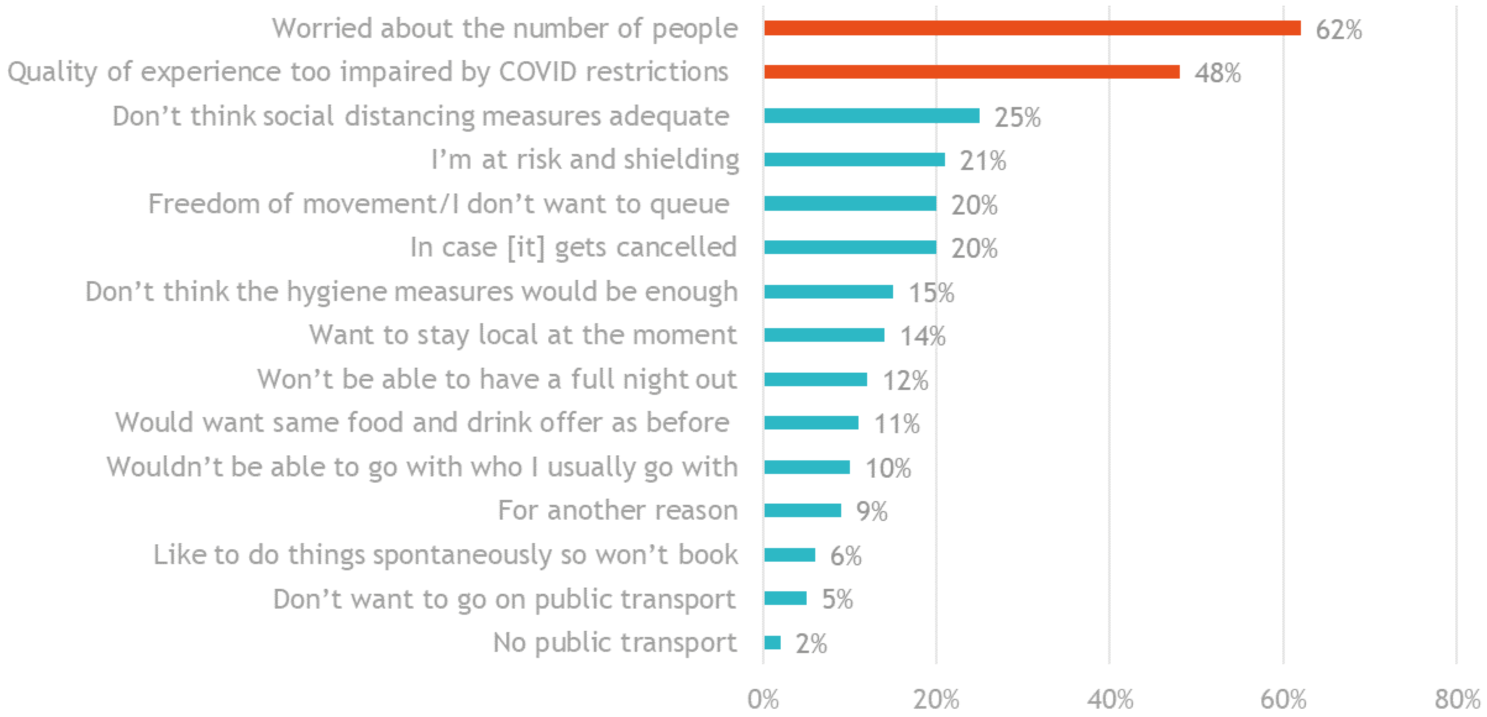


Fig. 39: Base: 595 / M.o.E: ±4%

Together, these suggest that more needs to be done to convince many in this group that it's ok to reattend. Concern about numbers was particularly pronounced, although more research would be needed to know whether a more 'acceptable' number of people was at feasible occupancy levels (i.e. whether any gathering of a substantial audience would be 'too many', or whether concerns diminish below a certain level of occupancy). For more on performing arts audiences' motivations, see the 'Motivations' section.

Appendix 1 – The Survey

CREATIVE SCOTLAND
ALBA | CHRUTHACHAIL

[Venue] COVID-19 survey

This survey has been devised in partnership with Creative Scotland, the public body that supports the arts, screen and creative industries across all parts of Scotland. It is being carried out by The Audience Agency.

The purpose of it is to help us learn about how attitudes towards cultural activity might have changed during the Covid-19 pandemic. It will help inform us about how people might return and access culture in future, and what steps need to be taken to make the experience safe and enjoyable.

The survey should take no longer than 10 minutes, and will be really useful for [Venue] and the sector as a whole - we appreciate your time and your feedback.

1 Have you visited [organisation] since lockdown restrictions were lifted?

- Yes
- No

Question only asked when organisation has already re-opened.

This question will be tailored for each organisation so it accurately reflects their offer (e.g. if they're touring, or have a digital offer). This is the case wherever the default wording uses language such as 'visit' or 'organisation' - this will always be made relevant for the specific org (although will be kept generic as far as possible to aid set-up, and presentation of results)

2 Had you visited [organisation] *before* lockdown?

- Yes, in the last year
- Yes, between one and two years ago
- Yes, between two and three years ago
- Yes, between three and five years ago
- Yes, but more than five years ago
- No, I hadn't been before

Question only asked when Q1=Yes

3 Have you ever visited [organisation]? / Have you ever been to an [organisation] event?

- Yes, in the last 12 months
- Yes, between one and two years ago
- Yes, between two and three years ago
- Yes, between three and five years ago
- Yes, but more than five years ago - *Respondent will be screened out*
- No, I haven't visited [organisation] / No, I haven't been to an [organisation] event before - *Respondent will be screened out*

Question only asked when venue not yet reopened OR Q1="Yes"

4 Which of the following have you seen or done at [organisation] in the last three years? / Which of the following sorts of [organisation] events have you been to in the last three years? *Please tick all that apply*

- Plays/Drama
- Christmas Shows
- Musical Theatre
- Children/Family events
- General entertainment (including comedy, magic)
- Dance
- Music
- Literature
- Visual Arts
- Film
- Outdoor arts
- Workshops
- Something else

Only asked if organisations presents multiple artforms AND Q2 or Q3=respondent visited in last three years

4a What else have you seen at [organisation] in the last three years? / What other [organisation] events have you been to in the last three years?

Only asked if Q4="Something else"

Your recent visit

This section only asked if people have visited since reopening

5 How has your experience at [organisation] been since it reopened? / How has your experience of [organisation] been since events have restarted?

- ◯ Very good
- ◯ Good
- ◯ Ok
- ◯ Poor
- ◯ Very poor

Only asked if Q1="Yes"

6 Why has it been {Q5}?

Only asked if Q1="Yes". Dynamic text pulls in response from Q5

7 When do you think you'll visit again? / When do you think you'll come to another event?

- ◯ As soon as possible
- ◯ In a week or two
- ◯ In a month or so
- ◯ In the next two or three months
- ◯ In the next four to six months
- ◯ Some time in the next 12 months
- ◯ Longer than a year
- ◯ I won't visit again
- ◯ Not sure

Only asked if Q1="Yes"

[Organisation] after lockdown

8 If it was possible to visit [organisation] tomorrow, and assuming there was something you wanted to see, do you think you would... / If it was possible to come to a [organisation] event tomorrow, and assuming it was something you were interested in, do you think you would...

- ◯ Plan to attend as soon as possible
- ◯ Would visit but wait for a few weeks
- ◯ Would visit, but would be in no hurry to do so
- ◯ Would not visit in the foreseeable future
- ◯ Don't know

Question only asked for non-ticketed venues i.e. can be fairly spontaneous or would not previously have been able to book ahead

9 If tickets for a post-reopening programme of events went on sale tomorrow, and assuming there was something you wanted to see, do you think you would...

- ◯ Book now
- ◯ Would wait for a few weeks before booking
- ◯ Would book, but would be in no hurry to do so
- ◯ Would not book a ticket in the foreseeable future
- ◯ Don't know

Question only asked for ticketed venues i.e. less likely to be more spontaneous/would usually have the opportunity to book ahead, OR those with a mix of ticketed and non-ticketed

10 **Why would you give it some time?** *Please tick all that apply*

- [ ] Quality of experience may be too impaired by COVID restrictions
- [ ] There is no public transport to get me there
- [ ] I don't want to go on public transport at the moment
- [ ] I want to stay local at the moment
- [ ] I don't think the social distancing measures will be adequate
- [ ] I am worried about the number of people that would be there
- [ ] I don't think the hygiene measures would be enough
- [ ] I would want to have the same food and drink offer as before
- [ ] I would want to move around the venue freely/I don't want to queue
- [ ] I won't be able to have a full night out without the other things which make up a visit
- [ ] I like to do things spontaneously so probably won't do anything that involves booking
- [ ] I wouldn't be able to go with who I usually go with
- [ ] I'm at risk and shielding/live with someone who is at risk
- [ ] In case [venue] shuts again / In case [the event/performance] gets cancelled
- [ ] For another reason

Asked if Q8/Q9=anything other than "Visit as soon as possible"/"Book it now"

11 **Why else would you give it some time?**

Not asked unless Q10="For another reason"

12 **Before lockdown, on average how often did you visit [organisation] for [primary offer e.g. performances/screenings/exhibitions]? / Before lockdown, on average how often did you go to [organisation] events?**

- ○ Every day
- ○ Several times a week
- ○ Once a week
- ○ Less often than once a week but at least once a month
- ○ Less often than once a month but at least 3-4 times a year
- ○ Twice in the last 12 months
- ○ Once in the last 12 months
- ○ Less often

Not asked if Q2/Q3="No, I hadn't been before"/"No, I haven't visited [organisation]"

13 **Assuming all possible health and safety measures are put into place, when [organisation] reopens do you think you will visit for these things...**

- ○ As often as I ever did
- ○ More than I used to
- ○ Less often than I used to
- ○ Not sure how often I'll visit

Asked of all respondents

14 **Why {V16}?**

Asked of all respondents. Dynamic text pulls in answer from Q13.

Dynamic text fixed for Q13="Not sure how often I'll visit"

15 **If we introduced some form of pre-booking [for things which aren't usually ticketed (if mix of ticketed and not)] to help aid social distancing, would this make any difference to how often you visit?**

- ○ I'd visit a lot less often than I did before
- ○ I'd visit a little less often than I did before
- ○ It wouldn't make any difference
- ○ I'd visit a little more often than I did before
- ○ I'd visit a lot more often than I did before
- ○ Not sure

Only asked if ticketing/pre-booking will be required on reopening but was not required before

[Organisation] after lockdown (secondary offer - café, shop etc)

16 **Have you done any of the following at [organisation] in the last three years?** *Please tick all that apply*

- ☐ Used the shop
- ☐ Used the café
- ☐ Used the restaurant
- ☐ Used the kiosk
- ☐ Looked at the gardens or grounds
- ☐ Used the foyer areas
- ☐ Attended paid-for workshops
- ☐ Attended free family activities
- ☐ Gone to a special event such as a talk
- ☐ No, I haven't done any of these at [organisation] in the last three years

Only asked if Q2 or Q3=respondent visited in last three years. Last answer code set to exclusive.

Only relevant answer codes shown, as identified by organisation

Over the coming months, assuming this is available on reopening, how often do you think you'll do each of these things compared to how often you used to?

		A lot less often than before	A little less often	About the same	A little more often	A lot more often than before	Not sure
17a	Use the shop	○	○	○	○	○	○
17b	Use the café	○	○	○	○	○	○
17c	Look at the gardens or grounds	○	○	○	○	○	○
17d	Use the foyer area	○	○	○	○	○	○
17e	Attend paid-for workshops	○	○	○	○	○	○
17f	Attend free family activities	○	○	○	○	○	○
17g	Go to a special event	○	○	○	○	○	○

Will only show options chosen in Q16

****Will be customised for each organisation, so does not work in generic build of survey****

18a **Why will you do these things less often?**

Only asked if any of Q17a-Q17g="Much/a bit less often than before"

18b **Why will you do these things more often?**

Only asked if any of Q17a-Q17g="Much/a bit more often than before"

****Routing will need to be customised for each organisation, so does not work in generic build of survey****

19a **Is there anything you're particularly concerned about regarding any of the things you might do at [organisation]?**

Only asked if Q16="No, I haven't done any of these at [organisation]".

This will ask about all parts of the secondary offer.

Over the coming months, assuming it's available on reopening, how likely are you to do any of the following at [organisation]?

		Definitely will	*Probably will*	*Probably won't*	*Definitely won't*	*Not sure*
20a	Use the shop	◯	◯	◯	◯	◯
20b	Use the café	◯	◯	◯	◯	◯
20c	Look at the gardens or grounds	◯	◯	◯	◯	◯
20d	Use the foyer area	◯	◯	◯	◯	◯
20e	Attend paid-for workshops	◯	◯	◯	◯	◯
20f	Attend free family activities	◯	◯	◯	◯	◯
20g	Go to a special event	◯	◯	◯	◯	◯

Will only show options not chosen in Q16

Re-opening – motivations

21 When we reopen, do you think you'll visit for any of the following reasons? *Please tick up to three of your top reasons*

- ☐ Supporting the organisation
- ☐ Re-immersing myself in culture
- ☐ Getting back to normal
- ☐ Exploring an interest that I've picked up since lockdown
- ☐ Celebrating the end of lockdown
- ☐ Reflecting on the impacts of the last 6 months
- ☐ Having a family day out
- ☐ Escapism
- ☐ Getting out of the house
- ☐ Having a communal experience/spending time with other people (even at a distance)
- ☐ Attending a [production, performance, exhibition etc] that I really want to see
- ☐ Something else
- ☐ I probably won't visit

Not asked if venue has already reopened, otherwise asked of all respondents.

21a Why else would you visit?

Not asked unless Q21="Something else"

22 When you visited recently, did you visit for any of the following reasons? *Please tick up to three of your top reasons*

- ☐ Supporting the organisation
- ☐ Re-immersing myself in culture
- ☐ Getting back to normal
- ☐ Exploring an interest that I've picked up since lockdown
- ☐ Celebrating the end of lockdown
- ☐ Reflecting on the impacts of the last 6 months
- ☐ Having a family day out
- ☐ Escapism
- ☐ Getting out of the house
- ☐ Having a communal experience/spending time with other people (even at a distance)
- ☐ Attending a [production, performance, exhibition etc] that I really wanted to see
- ☐ Something else

Only asked if Q1="Yes"

22a Why else did you visit?

Not asked unless Q22="Something else"

Re-opening - content/format preferences

This section not asked to those who have already visited post-reopening, or for venues which have already reopened

23 **When we re-open, what would you be most interested in returning to see [or do]?** *Please tick all that apply*

- [ ] Plays/Drama
- [ ] Christmas Shows
- [ ] Musical Theatre
- [ ] Children/Family events
- [ ] General entertainment (including comedy, magic)
- [ ] Dance
- [ ] Music
- [ ] Literature
- [ ] Visual Arts/Exhibitions
- [ ] Film
- [ ] Outdoor arts
- [ ] Workshops
- [ ] None of these
- [ ] Not sure

Not asked if Q1="Yes"

Only asked for multi-artform venues

24 **Which of the following are you most interested in returning to see?** *Please tick all that apply*

- [ ] Plays/Drama
- [ ] Christmas Shows
- [ ] Musical Theatre
- [ ] Children/Family events
- [ ] General entertainment (including comedy, magic)
- [ ] Dance
- [ ] Music
- [ ] Literature
- [ ] Visual Arts/Exhibitions
- [ ] Film
- [ ] Outdoor arts
- [ ] Workshops
- [ ] None of these
- [ ] Not sure

Not asked if Q1="Yes"

Only asked if venue already open. Only asked for multi-artform venues

25 **Do you think you'll visit...** *Please tick all that apply*

- [ ] Alone
- [ ] With one other adult
- [ ] With more than one other adult
- [ ] With children
- [ ] Not sure

Not asked if Q1="Yes"

List made relevant for each org's potential offer

25a **How many people do you think you will visit with?**

[ ]

Only asked if Q25="With more than one adult"/"With children"

26 **Given the restrictions places on arts venues and performers at this time, a number of ideas have been proposed for new ways to do events.**

We wouldn't necessarily provide all of these ourselves, but which of the following would you be most interested in attending if offered in your local area? *Please tick up to three*

- [ ] Drive in cinema
- [ ] Drive in live events (e.g. theatre or music performances)
- [ ] Mobile cinema visiting your community
- [ ] Open air theatre in parks, public gardens etc.
- [ ] Live streaming of events which you pay to watch at home
- [ ] Visiting outdoor art or sculpture collections
- [ ] 'Promenade' theatre with an audience walking through a specific site in small groups
- [ ] Smaller scale performances in community halls or outdoors in communities
- [ ] Online classes to participate in creative activities at home
- [ ] Performances in large unused spaces or temporary spaces
- [ ] Street art or projected artworks outdoors
- [ ] None of these appeal
- [ ] Don't know

Not asked if Q1="Yes"

This question is based on the 56 Degrees population survey, and isn't about the venue at hand. The previus version of this question was about the venue at hand, but didn't work very well as the potential offer is very different for each org.

27 Would you prefer… *Please tick all that apply*

- [ ] Seated performances
- [ ] Standing performances
- [ ] Performances in larger venues
- [ ] Performances in smaller venues
- [ ] Outdoor/open-air performances/exhibitions/screenings
- [ ] Performances in large unused or temporary spaces
- [ ] Street art or projected artworks outdoors
- [ ] Work presented in communities/smaller scale performances in community halls or outdoors in communities
- [ ] None of these
- [ ] Not sure

Not asked if Q1="Yes"

Supporting [organisation]

[As/when] we re-open, would you consider any of the following to help us operate whilst COVID restrictions are in place?

		Would definitely consider	*Might consider*	*Probably wouldn't consider*	*I wouldn't do this*	*Not sure*
28a	Paying more than before	○	○	○	○	○
28b	Paying a suggested (but not mandatory) surcharge	○	○	○	○	○
28c	Making a donation	○	○	○	○	○
28d	Contributing to a crowdfunding campaign	○	○	○	○	○
28e	Becoming a member	○	○	○	○	○
28f	Doing something else to support the organisation	○	○	○	○	○

28f1 What else would you consider doing to help the organisation?

Asked if Q28h="Would definitely consider"

COVID-19 Measures

The following question lists a number of measures which cultural organisations may implement to help tackle the spread of COVID 19.

To what extent, if at all, would each of these measures influence your willingness to attend cultural events and venues?

		Much less likely to attend	*Slightly less likely to attend*	*No difference*	*Slightly more likely to attend*	*Much more likely to attend*
29a	Clear physical distancing measures in place (e.g. signage, floor makings, staff ensuring safety)	○	○	○	○	○
29b	Accreditation or 'kite mark' for venues which meet national safety standards	○	○	○	○	○
29c	Measures to help manage queues (e.g. scheduled arrival times)	○	○	○	○	○
29d	All staff having specific COVID-19 training	○	○	○	○	○
29e	Restrictions on audience/visitor numbers	○	○	○	○	○
29f	Requirement for visitors to wear a face covering	○	○	○	○	○
29g	Staff wearing face coverings and gloves	○	○	○	○	○

And to what extent, if at all, would each of the following measures influence your willingness to attend cultural events and venues?

		Much less likely to attend	*Slightly less likely to attend*	*No difference*	*Slightly more likely to attend*	*Much more likely to attend*
30a	Availability of hand sanitiser or wipes throughout the venue	○	○	○	○	○
30b	On site health monitoring (e.g. taking visitors' temperature on admission)	○	○	○	○	○
30c	Reassurance about cleaning procedures (e.g. of toilets or seating)	○	○	○	○	○
30d	A requirement to pre-book online	○	○	○	○	○
30e	Contactless payment only in venues	○	○	○	○	○
30f	Amended event times (e.g. daytime performances or shorter performances)	○	○	○	○	○
30g	A reduced food and drink offer (e.g. pre-packaged items)	○	○	○	○	○
30h	Socially distanced seating configurations (e.g. in theatres, cinemas)	○	○	○	○	○
30i	Relaxed refund conditions (e.g. refunds if you can't make it)	○	○	○	○	○

31 Is there anything else would you like to be in place before attending cultural events and venues?

[ ]

Digital during lockdown and beyond

32 We're interested in whether or not online digital content provided by cultural organisations during lockdown has increased people's use of this sort of content.

Have you done any of the following via cultural organisations more than you did before lockdown? *Please tick all that you have done more during lockdown than you did before*

- ☐ Virtual tours of museums or galleries
- ☐ Online workshops provided by an arts or cultural organisation
- ☐ Streamed theatre performances
- ☐ Streamed concerts
- ☐ Streamed dance performances
- ☐ Streamed literature evens
- ☐ Streamed films from cultural organisations (not including services such as iPlayer, Netflix, Now TV)
- ☐ Streamed talks, conversations or podcasts
- ☐ Online arts or cultural activities for children
- ☐ No, I've done these about the same amount during lockdown
- ☐ No, I haven't done any of these during lockdown

Asked to all respondents

NOTE: this is different from the equivalent 56 Degree population survey question, which defines 'cultural activities at home' more widely.

33 Have you paid for any of this online arts/culture activity? *Please tick all that apply*

- ☐ Yes, required payment (e.g. fixed price or ticketed)
- ☐ I made a donation
- ☐ It's included with membership
- ☐ No, it was free

Only asked if Q32="No"

How likely do you think you are to...

		Very likely	*Quite likely*	*Not very likely*	*Not at all likely*	*Not sure*
34a	Continue to do this after lockdown	○	○	○	○	○
34b	Do this instead of physical visits	○	○	○	○	○
34c	Do this *as well as* physical visits	○	○	○	○	○
34d	[Continue to] Pay for online cultural content	○	○	○	○	○

Only asked if Q32="No"

About you

This final section is about you. It's a little more personal but is really useful to us. The questions have been designed to align with the way the UK Government collects Census data in Scotland and how the Scottish Government collects data for the Scottish Household Survey

By answering these questions, you will help us to see the extent to which we're serving everyone in our community. If there are any questions that you'd rather not answer, please select "Prefer not to say" or skip to the next question.

35 How would you describe your gender identity?

- ◯ Man
- ◯ Woman
- ◯ In another way
- ◯ Prefer not to say

Asked to all respondents.

NOTE: uses Creative Scotland AF categories so different from 56 Degree population survey but comparable

36 If you would like to, please tell us what other words you use

[ ]

Only asked if Q35="In another way"

37 What is your age?

- ◯ Under 16
- ◯ 16 - 19
- ◯ 20 - 24
- ◯ 25 - 29
- ◯ 30 - 34
- ◯ 35 - 39
- ◯ 40 - 44
- ◯ 45 - 49
- ◯ 50 - 54
- ◯ 55 - 59
- ◯ 60 - 64
- ◯ 65 - 69
- ◯ 70 - 74
- ◯ 75 - 79
- ◯ 80 - 84
- ◯ 85 or older
- ◯ Prefer not to say

Asked to all respondents.

NOTE: uses Creative Scotland AF categories so different from 56 Degree population survey but comparable

38 Have you at any point been advised by your GP to stay at home and shield because you are particularly vulnerable to COVID 19?

- ◯ Yes
- ◯ No
- ◯ Don't know
- ◯ Prefer not to say

Asked to all respondents.

Same as 56 Degree population survey

39 Do you have any children aged under 18 living in your household?

- ◯ No
- ◯ Yes - 1 child
- ◯ Yes - 2 children
- ◯ Yes - 3 children
- ◯ Yes - 4 or more children
- ◯ Prefer not to say

Asked to all respondents.

Same as 56 Degree population survey.

40 Which option best describes your ethnic group or background?

- ◯ White: Scottish
- ◯ White: Other White British
- ◯ White: Irish
- ◯ White: Gypsy/Traveller
- ◯ White: Polish
- ◯ White: Other
- ◯ Mixed or Multiple ethnic groups
- ◯ Asian: Pakistani, Pakistani Scottish or Pakistani British
- ◯ Asian: Indian, Indian Scottish or Indian British
- ◯ Asian: Bangladeshi, Bangladeshi Scottish or Bangladeshi British
- ◯ Asian: Chinese, Chinese Scottish or Chinese British
- ◯ Asian: Other
- ◯ African: African, African Scottish or African British
- ◯ African: Other
- ◯ Caribbean or Black: Caribbean, Caribbean Scottish or Caribbean British
- ◯ Caribbean or Black: Black, Black Scottish or Black British
- ◯ Caribbean or Black: Other
- ◯ Arab, Arab Scottish or Arab British
- ◯ Any other ethnic group
- ◯ Prefer not to say

Asked to all respondents. AF Scotland question.

41 How would you describe your ethnic group or background?

Only asked if Q40="White: Other" or "Mixed or multiple ethnic groups" or "Asian: Other" or "African: Other" or "Caribbean or Black: Other" or "Any other ethnic group"

42 Do you identify as a D/deaf or disabled person, or have a long-term health condition?

- Yes
- No
- Prefer not to say

Asked to all respondents.

Same as 56 Degree population survey

43 What is your postcode, or country of residence if you live overseas? *This information will only be used for research - it will not be used to identify you or add you to any mailing lists.*

Asked to all respondents

Thank you for your help. Please click 'Submit' to close the survey.

Thanks for your interest - this survey is only for people who have visited [Organisation] [events] in the last five years.

This is only shown to people who screen out on the first question - they jump straight to the end.

Appendix 2 – Summary of Audience Spectrum Segments

Metroculturals *(Higher engagement)*

Prosperous, liberal urbanites, Metroculturals choose a city lifestyle for the broad cultural opportunity it affords. They are therefore interested in a very wide spectrum of activity, but many tend towards their own preferred artform or style. Although active museum attenders, more engage with the arts and many on a weekly basis. Working in demanding but rewarding professions, they are highly educated and have a wide variety of other interests from food and travel to current affairs and architecture.

Commuterland Culturebuffs *(Higher engagement)*

Affluent and settled with many working in higher managerial and professional occupations. Commuterland Culturebuffs are keen consumers of culture, with broad tastes but a leaning towards heritage and more classical offerings. Mature families or retirees, living largely in leafy provincial suburban or greenbelt comfort, they are willing to travel and pay for premium experiences, their habits perhaps influenced by commuting. Motivations are multiple, ranging from social and self-improvement, to the pursuit of learning opportunities for older children. They tend to be frequent attenders and potential donors.

Experience Seekers *(Higher engagement)*

An important and significant part of urban arts audiences, these highly active, diverse, social and ambitious singles and couples are younger people engaging with the arts on a regular basis. Students, recent graduates and in the early to mid-stages of their careers, they live close to city centres, have easy access to and attend a wide variety of arts, museums galleries and heritage. Interests cover mainstream, contemporary and culturally diverse offers and attending is at the heart of their social lives. They are mostly in search of new things to do and have disposable income to spend on a variety of leisure activities like sports/arts memberships and frequent visits to cafes, bars and restaurants. Digitally savvy, they will share experiences through social media on their smart phones.

Dormitory Dependables *(Medium engagement)*

A significant proportion of audiences are made up of this dependably regular if not frequently engaging group. Most live in suburban or small towns and show a preference for heritage activities, alongside popular and more traditional, mainstream arts. Many are thriving well off mature couples or busy older families; lifestage coupled with more limited access to an extensive cultural offer mean that culture is more an occasional treat or family outing than an integral part of their lifestyle.

Trips and Treats *(Medium engagement)*

While this group may not view arts and culture as a passion, they are reasonably active despite being particularly busy with a wide range of leisure interests. Comfortably off and living in the heart of suburbia their children range in ages, and include young people still living at home. With a strong preference for mainstream arts and popular culture like musicals and familiar drama, mixed in with days out to museums and heritage sites, this group are led by their children's interests and strongly influenced by friends and family.

Home and Heritage *(Medium engagement)*

Conservative in their tastes, this more mature group appreciates all things traditional: a large proportion are National Trust members, while classical music and amateur dramatics are comparatively popular. While this is not a highly engaged group – partly because they are largely to be found in rural areas and small towns – they do engage with the cultural activity available to them in their locality. They look for activities to match their needs and interests, such as accessible day-time activities or content exploring historical events.

Up Our Street *(Lower engagement)*

Living reasonably comfortable and stable lives, Up Our Street engage with popular arts and entertainment and museums, and are also visitors of heritage sites. Many are older and have some health issues, living on average or below average household incomes, so access in all its forms can be an issue. Modest in their habits and in their means, value for money and low-risk are important factors in leisure decision making.

Facebook Families *(Lower engagement)*

Arts and culture play a very small role in the lives of this younger, cash-strapped group living in suburban and semi-urban areas of high unemployment. They are the least likely to think themselves as arty, while less than a third believe that the arts is important. Nevertheless, they do go out as families: cinema, live music, eating out and pantomime.

Kaleidoscope Creativity *(Lower engagement)*

Characterised by low levels of cultural engagement despite living in and around city areas where plenty of opportunities are within easy reach. A great mix of people comprise this segment with a wide range of ages, living circumstances, resources and cultural backgrounds all living cheek-by-jowl. Low incomes and unemployment can present barriers to accessing some cultural provision. Nevertheless, two thirds do engage with more popular and accessible culture annually, some of this in the local community and outside the mainstream. Free, local events like outdoor arts, festivals and carnivals may appeal, and so might popular offerings like musicals and music events.

Heydays *(Lower engagement)*

Heydays are the group least likely to attend arts or cultural events, believing that the arts are no longer as important or relevant to them as perhaps they once were. Many live in sheltered or specially adapted accommodation for older people, and are excluded from many activities due to a raft of health, access and resource barriers. If they do engage this is likely to be participatory such as craft and knitting, painting, reading and writing activities organised by their sheltered housing, church group or community library.

For more information about the segments, see https://theaudienceagency.org/off-the-shelf/audience-spectrum/profiles

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