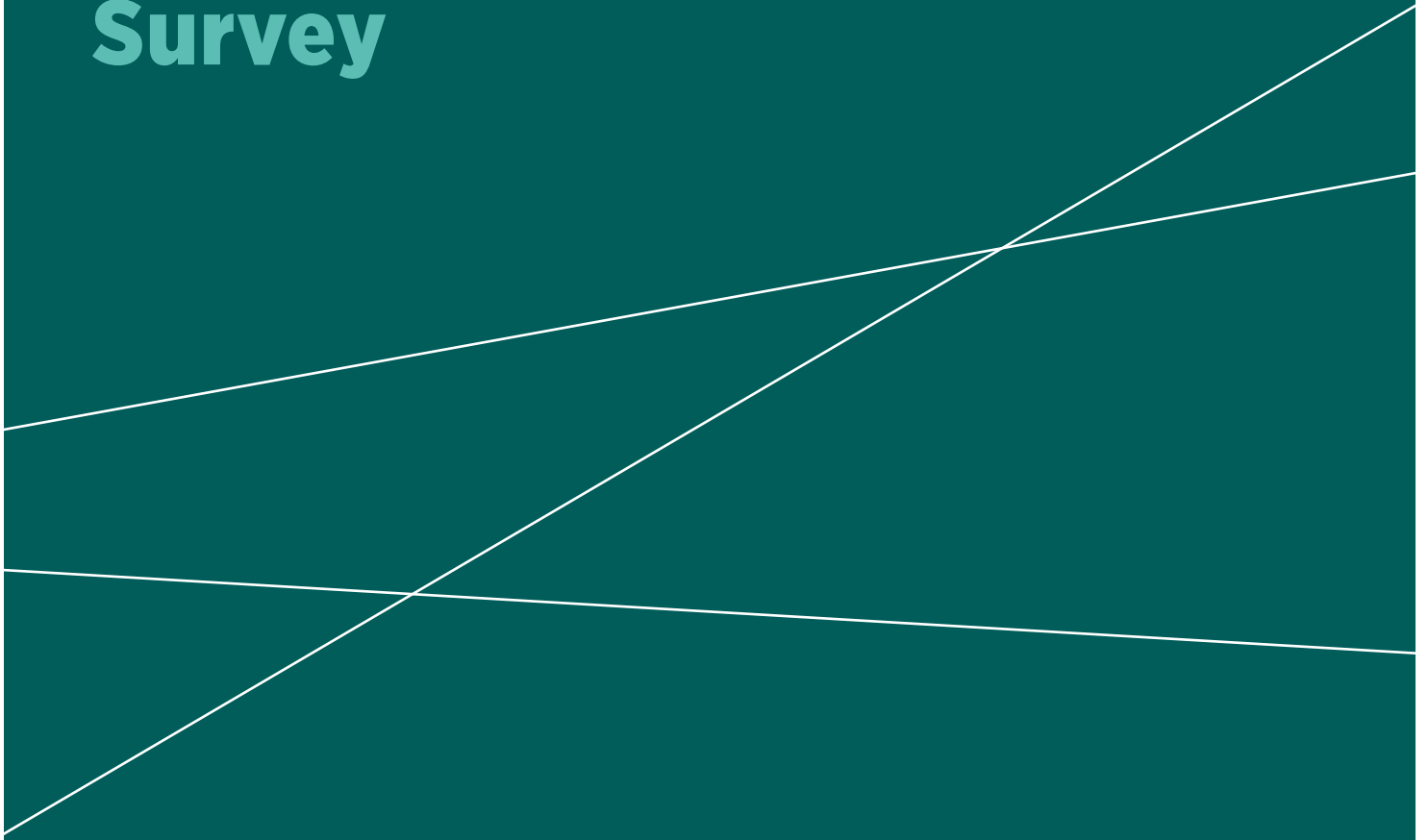
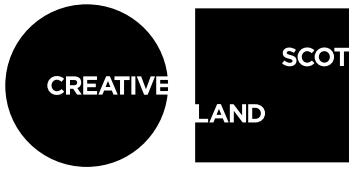


Creative Scotland

COVID-19 Population Survey





ALBA | CHRUTHACHAIL

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Background

- 1** Following the lockdown measures introduced in the UK in March 2020, the impact on the arts sector – like much of wider society – has been sudden and severe. As these measures were eased over Summer 2020, Creative Scotland commissioned 56 Degree Insight to undertake research looking at the attitudes of the general population in relation to arts participation and attendance. This work involves a programme of survey research between July 2020 and January 2021 to monitor and measure audience interest in returning to arts activities and changing patterns of cultural consumption.
- 2** The first wave of research was completed in August 2020 and invited 1033 participants to complete an online survey, a representative sample of the Scottish population. They 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 first wave of research. To access the full report, go to:

www.creativescotland.com/resources/covid-19-audiences

Introduction

3 Although Scotland has seen the phased easing of COVID-19 lockdown measures, some restrictions are likely to be in place for some time to come. This survey research, commissioned by Creative Scotland and undertaken by 56 Degree Insight in July and early August 2020, aims to better understand the Scottish population's attitudes to attending cultural events and venues.

4 The findings show that demand 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:

- The majority of Scotland's population have really missed the opportunity to go to cultural events and venues during lockdown

- During lockdown the vast majority of people engaged in cultural activity at home
- Post-lockdown, interest in attending cultural activities is, however, lower than for many other leisure pursuits
- Around a third of the population are comfortable attending cultural events in the near future, but the majority of people remain wary
- The main concerns of the public are the desire to avoid crowds and being able to maintain social distance
- Audiences are nevertheless looking forward to attending cultural activity when they can, and are open to trying new experiences at different types of venue

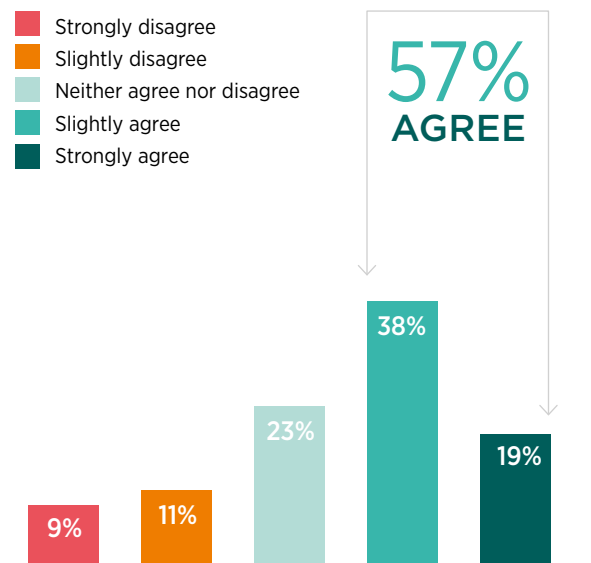
Culture in Lockdown

5 Over half the population report that they missed cultural activity during lockdown. 57% of respondents to the survey agreed or strongly agreed with the statement that since lockdown they had really missed the opportunity to go to cultural events and venues and only one in five disagreed (Figure 1). People who had attended most often before lockdown were the most likely to miss the opportunity to do so, with 71% agreeing or strongly agreeing with the statement.

57%

of the population report that they missed cultural activity during lockdown

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

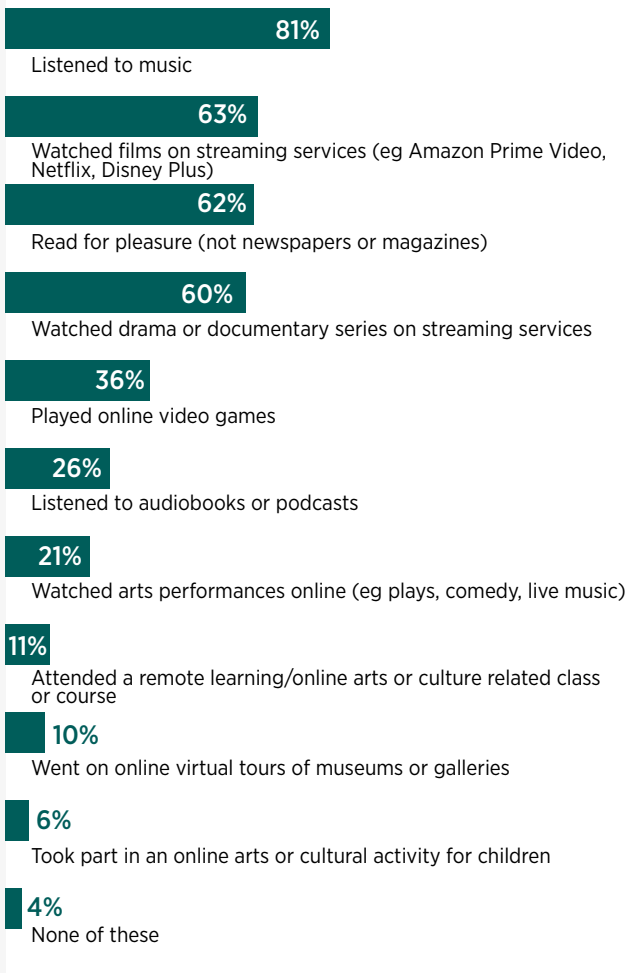


6 The vast majority of the population (96%) engaged in cultural activity at home during lockdown, with listening to music (81%), streaming films (63%) and reading (62%) the most popular activities. Where data is available, we see increased levels of participation in all of these activities compared to before lockdown (Figure 2).

96%

of the population engaged in cultural activity at home during lockdown

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



7 A third of the population (33%) had participated in 'substitute' cultural activities that could be compared more directly with attending cultural events and venues: viewing performing arts online; attending virtual tours of museums or galleries; attending remote learning classes; or taking part in online arts or cultural activity for children.

8 Cultural engagement during lockdown was highest amongst those who most regularly attend cultural events and venues, and showed a strong relationship to preferences before lockdown (ie high numbers of concertgoers listened to music at home and high numbers of cinema attendees streamed films). Younger people (aged 16-34) reported the highest usage of streaming services, online gaming, listening to audiobooks and podcasts, watching online performances and attending online learning sessions, while older age groups (aged 55 and over) reported higher levels of reading for pleasure.

9 The Scottish public also increased the frequency of their participation in at-home cultural activities during lockdown. Around half the population listened to music more frequently, and over half watched more drama, documentaries or films on streaming services. Two-fifths of the population reported spending more time reading for pleasure during lockdown, playing online video games and watching arts performances online.

10 The survey asked people if their enjoyment of lockdown cultural activities meant that they hoped to do them more often in the future. Their responses were mixed: nearly a third (31%) agreed that they would, 45% neither agreed or disagreed and 23% disagreed. Respondents reported a limited appetite for paying for the activities they had accessed online during lockdown, with only 20% willing to pay for these in the future. Levels of ongoing interest and willingness to pay were highest for people who had attended online activities for children, remote learning sessions or online virtual tours of museums and galleries.

20%

Despite an increase in online cultural activities, only 20% of the population said they would be willing to pay for such activities in the future

Post-lockdown leisure

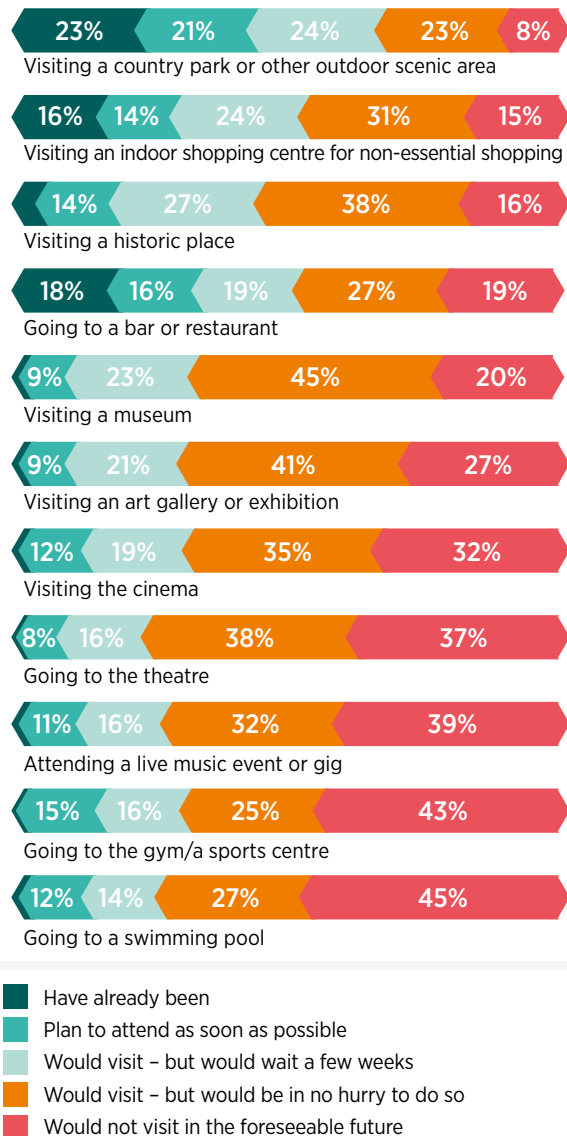
11 Survey respondents were asked to rate their desire to take part in a range of leisure activities.¹ Interest in attending cultural activities was generally lower than for many other types of leisure pursuits, with average ratings ranging from 5.3 for visiting an art gallery or exhibition to 4.9 for attending a live music event. While the desire to visit country parks and other outdoor areas was high (an average of 7.5 out of 10), levels for indoor activities were much more varied, with swimming pools, gyms and sports centres the least popular. (Figure 3)

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



12 The survey also asked when people would feel happy to take part in cultural and leisure activities once lockdown rules allowed. A large proportion of the Scottish population had already been to or had plans to visit outdoor places, shopping centres and bars and restaurants as soon as possible. Respondents were more reluctant to attend cultural events and venues at an early opportunity; over two thirds of the population were 'in no hurry' or not planning to visit cinemas, art galleries, live music events or theatres.² Less than a third planned to go the theatre, cinema or museum within the first few weeks of them reopening (Figure 4).

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



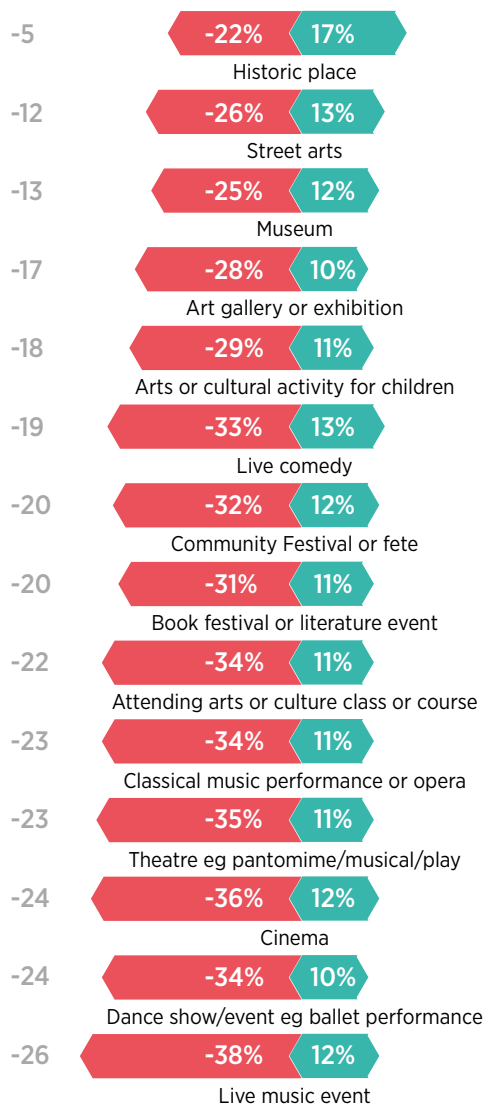
1 Where the activities are already possible, respondents were asked to base their answer on how they feel about doing them now. Where venues are still closed, respondents were asked to base their answer on when they reopen.

2 Responses shown exclude those who stated a venue or type of activity was not relevant to them.

Attitudes to cultural attendance

13 Respondents were asked how their appetite for different cultural activities had changed since the COVID-19 outbreak, 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'). Demand for all stated cultural activity is suppressed, from a net reduction of 5% for visiting an historic place to a net reduction of 26% for attending a live music event (Figure 5).

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



Less likely to consider More likely to consider

5%

net reduction for visiting an historic place

14 Respondents were asked how comfortable they would feel attending performances at a range of venue types. While over half (56%) felt very or fairly comfortable attending outdoor events, fewer were comfortable attending community venues (39%), medium to large indoor venues (37%), arena sized venues (34%) or smaller indoor venues (30%). Notably, nearly 40% of the population would not feel comfortable in smaller indoor venues even if they had assurances on safety measures. Across all venue types, people aged 16-34 were more likely to state that they felt comfortable while people aged over 55, those with a disability or long-term health condition, residents of rural areas and infrequent arts attenders were least comfortable. Comfort with indoor venues is highest among younger people (16-34).

26%

net reduction for attending a live music event

15 The frequency with which the Scottish population expects to attend arts events and venues has also decreased. Although around half of respondents expected the extent of their activity to be the same as before the COVID-19 outbreak, many others expect to attend less often, particularly for live music events, dance, theatre and cinema. People who are most confident in attending in the near future tend to be younger and are more likely to have children at home.

16 Respondents were asked to comment on the key concerns they would have when deciding on whether to attend arts and cultural activities. The most frequently cited factors related to confidence that venues were enforcing the required restrictions and that controls were in place on the numbers of people attending. Other responses were more general with respondents stating that their main concern would be if it was safe to go out, the infection rate in the local area and whether a vaccine was available.

15%

of the population would be more likely to attend venues if a form of accreditation to meet safety standards was in place

17 The survey specifically asked about the importance of a number of measures which might make them more likely to attend:

- Measures to support social distancing would make up to a quarter of the population much more likely to attend, including clear physical distancing measures (24%), seating configurations (23%), restrictions on audience or visitor numbers (23%) and queue management measures (19%).
- Enhanced hygiene measures would also make a difference for many people, including availability of hand sanitiser (22%), staff wearing face coverings and gloves (21%) and reassurance about cleaning procedures (21%). For 15% of the population a form of accreditation or 'kite mark' for venues that meet national safety standards would make them much more likely to attend.
- Changes to the offer from cultural organisations, including amended event times, pre-booking requirements or a reduced food or drink offer are less likely to encourage the public to return.

Returning to cultural activity

18 Respondents were asked to specify the arts activities they are most looking forward to attending again in the future. Nearly half the population (46%) identified looking forward to going to the cinema, followed by live music events (35%), the theatre (31%) and art galleries and exhibitions (22%).

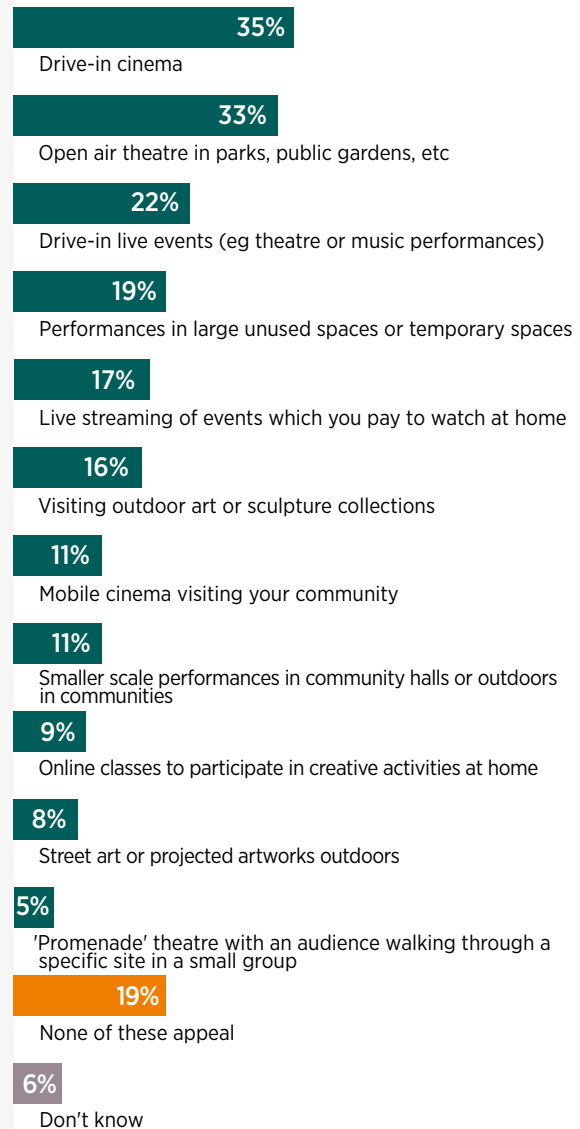
81%

of the population are interested in attending arts activities

19 There is evidence that people are interested in new ways of consuming arts activity. Overall, 81% of the Scottish population stated that they would be interested in attending one or more of the options shown. In particular, 35% of the Scottish population are interested in attending drive-in cinema and a third are interested in open air theatre (Figure 6). These percentages increase amongst those who previously attended cinema or theatre (43% and 45% respectively).

20 Views on providing financial support to the arts were more mixed. A third of the population are open to joining membership schemes or supporting crowdfunding campaigns to support arts organisations while COVID-19 restrictions are in place. Two-fifths (40%) of people would be happy to pay more for tickets or to make a donation if this allowed cultural organisations to stay open, but people want a money back guarantee on tickets. Over half of the population (57%) reported that in future they would only book to go to events if they had a guarantee of money back if cancelling at short notice.

Figure 6: Which of the following would you be most interested in attending if offered in your local area?

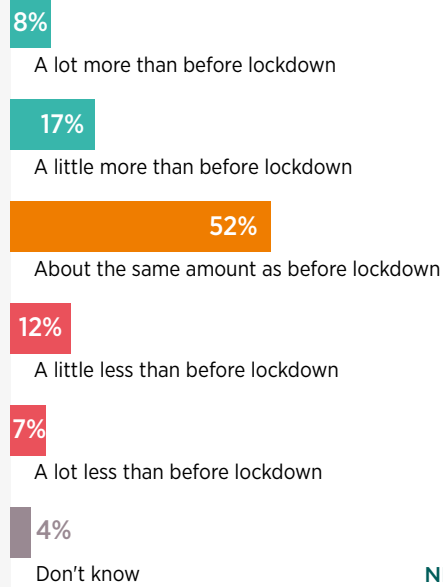


21 It is only when a vaccine is in place that many will feel comfortable returning to pre-COVID levels of attendance. In the event of the virus being eradicated or a vaccine being found, half of the population would expect to attend the arts at the same levels as before COVID-19 and 25% said they would attend more often (Figure 7). Younger age groups were most likely to expect to increase their overall participation (34% would do more and 19% would do less).

25%

of the population said they would attend the arts more frequently should a vaccine be found or the virus eradicated

Figure 7: Were we to return to the same conditions as before lockdown, how often would you expect to attend arts and cultural events?





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