



# Covid 19: Public intentions on returning as audience members

Wave 1 report  
(27<sup>th</sup> July – 2<sup>nd</sup> August)

Creative Scotland  
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## Cultural engagement during lockdown

- Most of the population (57%) are missing the opportunity to go to cultural events and venues. This percentage increases to 71% amongst those who previously attended at least once a month.
- However, while at home during lockdown the vast majority of the population (96%) had engaged in one or more forms of cultural engagement.
- The most popular activities were listening to music (81%), watching films (63%) and other content (60%) on streaming services, reading (62%) and playing video games (36%).
- In addition to these most popular activities, around a third of the population took part in activities which sought to 'replace' physical events and venues. Specifically, 21% had watched an arts performance online, 11% attended an online arts class or course and 10% virtual content provided by a museum or gallery.

- Compared to the same period in 2019, most of the population reported that their participation in cultural activities at home had increased.
- Most notably 60% increased participation in watching films on streaming services, 48% listened to music more often and 47% spent more time reading for pleasure.
- However, less than a third agreed that they had enjoyed the cultural activities they had been doing at home during lockdown sufficiently for them to want to continue doing them more often in the future (31%) and only around 1 in 5 (19%) would be willing to pay for to access this activity in future.

## Looking to the future

- The population's desire to attend cultural venues when it is possible to again in the future is extremely polarized.
- While many people would like to start attending events and venues again as soon as possible, a similar sized proportion of the population are feeling wary and won't be in a hurry to attend again.
- For example, while 68% expect to go to the cinema again in the future, just 33% would do so within a few weeks. Also, interest in attending live performances in the future is lower than for other activities (63% for theatre, 61% for live music).
- In comparison to other leisure pursuits, desire to attend culture is much lower than recorded for visiting outdoor places such as country parks, or for visiting bars and restaurants or indoor shopping centres but higher than for sporting venues.

## Attendance in the new normal

- While some state that COVID 19 has not impacted on their likelihood to consider attending cultural events and activities, a significant percentage of the population are less likely to consider attending than before the outbreak.
- Overall the 'net' negative impact of this decline in consideration is most significant for live music events (-26), dance shows (-24) and cinema (-24) but less marked for those activities which can take place in an outdoor venue or larger, airier place, for example visiting an historic place (-5), street arts (-12) or going to a museum (-13).
- Correspondingly the population feel most comfortable attending events in an outdoor environment (56% feel very or fairly comfortable) while over half would avoid or only attend indoor venues if they had assurances on safety measures in place. These concerns are particularly acute amongst those aged 55+, people with a disability or long term illness, rural residents and people who previously did not attend arts events or venues frequently.
- The measures most likely to make audiences more likely to attend cultural venues in future largely relate to ensuring social distancing including restrictions on audience numbers (23% much more likely to attend), clear physical distancing measures (24%) and socially distanced seating measures (23%). Assurances around cleanliness and hygiene are also important in attracting audiences back - in particular availability of hand sanitation, reassurances about cleaning and staff wearing face coverings and gloves.
- Reactions to concepts for new types of place to visit and events to attend were generally positive, especially amongst people aged 16 to 34 and previous high frequency attenders. The most popular concepts were drive in cinema (35% of the population interested), open air theatre (33% interested) and drive in live events (22%).
- In the event of the virus being eradicated or a vaccine being found, while half of the population would expect to attend the arts at the same levels as before COVID 19 and 25% claim they would attend more often almost a fifth (19%) expect that they would attend less.



# Background



The 2019 population survey undertaken by 56 Degree Insight for Creative Scotland clearly illustrated the importance of arts and creativity to the Scottish population. During 2019 over four in five adults living in Scotland took part in creative activities or attended or watched arts or creative pursuits. Specifically, almost half regularly attended the cinema (47%) and visited museums (44%) while over a third regularly visited historic properties (38%), attended live music events (34%) or went to galleries (33%).

Taking part in arts and creativity brings many benefits. The survey found that a large proportion of the population felt that it helped them to relax, made them feel good, improved their wellbeing and allowed them to learn something new. Not surprisingly given the benefits gained, around three in five Scots stated that they would like to take part in creative activities more often.

As well as these clear societal benefits obtained through arts, the creative sector is massively important to the Scottish economy. According to the Scottish Government's latest figures the creative sector employs more than 70,000 people and is worth almost £4 billion to the economy.

Creative Scotland's 10 year plan for the period 2014 to 2024 sought to build on this success, helping the sector to strengthen and grow, widening diversity in the sector and helping to promote Scotland across the world as a distinctive, creative nation.



# A survey to track the population's behaviours and attitudes providing insights to support the sector's recovery from Covid 19

Creative Scotland's chief executive Iain Munro has described the scale and severity of the impacts of Covid-19 on the arts sector as daunting. Despite emergency support many arts venues fear for their future, particularly given the physical distancing measures likely to be in place for the foreseeable future.

As lockdown measures are eased in Scotland, research is required to better understand the Scottish population's changing attitudes in relation to attending cultural venues, events and activities.

This research has been commissioned by Creative Scotland to measure and track the population's hopes and fears, their demand to consume arts and changing patterns of consumption as we emerge from lockdown.

As illustrated below, a number of key questions will be addressed by this research through a series of regular survey waves conducted with the Scottish population between July 2020 and early 2021.

## When and how will the economic recovery of creative sectors in Scotland take place?

### When will audiences return to engaging with cultural activity?

What are overall levels of desire to take part in out of home cultural activities?

How do these levels of desire vary by art forms and sectors, venue types and content of presented work?

How do these levels of desire vary by demographic groups and place of residence? e.g. age, health status, ethnicity, children in home.

### What are the enablers of, and barriers to, audiences returning?

What factors will motivate the population to return when the time is right? e.g. health, wellbeing, education, social benefits which they miss.

What are the greatest concerns preventing return, from both broad concerns (e.g. R number, health issues) to specific ones relating to venue types, art forms, locations?

### How will patterns of consumption and spending have changed?

How are overall levels of participation in different art forms changing and likely to change in near future?

How will changing needs impact on how the population seeks to consume different art forms.

What are the economic implications e.g. are audiences willing to pay for digital consumption or pay more to attend venues with low occupancy levels.

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

What implications will all of this have for the cultural sector?

How will the impacts and implications vary across the sector?

# A robust online approach providing a representative view of the population's behaviours and attitudes

- It is planned that three or four waves of research will be undertaken between July 2020 and January 2021 to measure and track the Scottish adult population's behaviours and attitudes toward arts attendance. This report provides results from the first wave of this study.
- An online approach was used with fieldwork undertaken between Monday 27th July and Sunday 2nd August 2020. Given the fast changing situation the timing of the fieldwork is important to note and will have a bearing on the responses provided (for example all of the interviews were completed before the local lockdown was put in place in Aberdeen on 5<sup>th</sup> August).
- 1,033 interviews were conducted over this period with sample drawn from the Dynata online panel. Geographic and demographic quota controls were used to ensure that the sample was representative of the population (targets based on age, sex, socio-economic status and region).
- The table on the right illustrates the profile of the sample by key demographics, quotas were also used to ensure representative coverage of all local authority areas.

	Sample profile
<b>Sex</b>	
Male	48%
Female	52%
<b>Age</b>	
16-34	29%
35-54	32%
55+	39%
<b>Socio-economic group</b>	
ABC1	52%
C2DE	48%
<b>Children in household</b>	
Yes	28%
No	72%





# Cultural engagement during lockdown

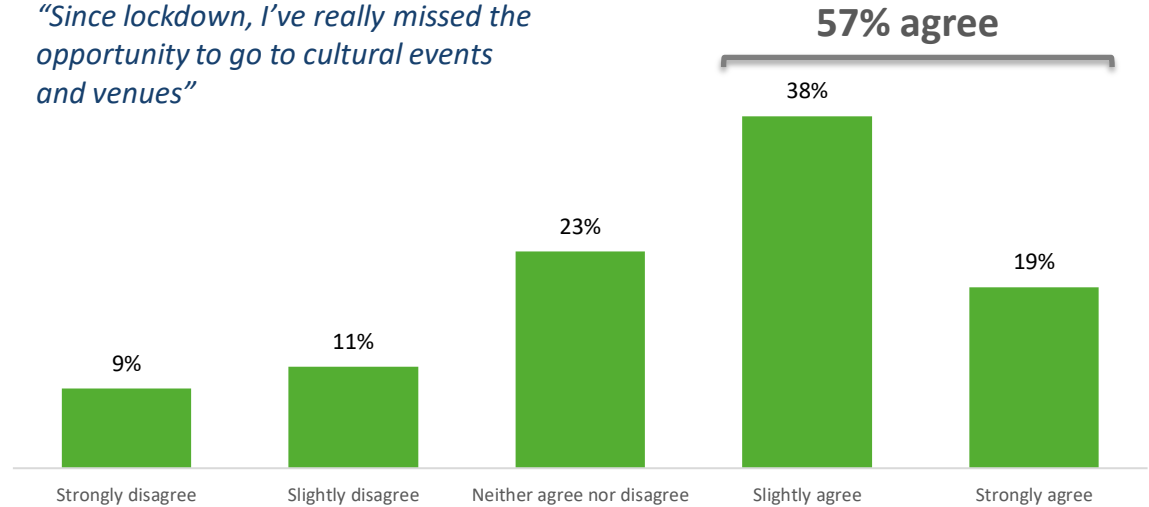


# Over half of the population have really missed attending cultural venues and events

- Since the start of lockdown 57% of the population agree that they have missed the opportunity to go to cultural events and venues.
- Around a fifth strongly agree with this this statement (19%) but this percentage was higher amongst those who attended arts events at least monthly before lockdown (29%), members of the AB socio-economic group (25%) and residents of the 10% least deprived areas.

Figure 1 – Level of agreement with statement

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



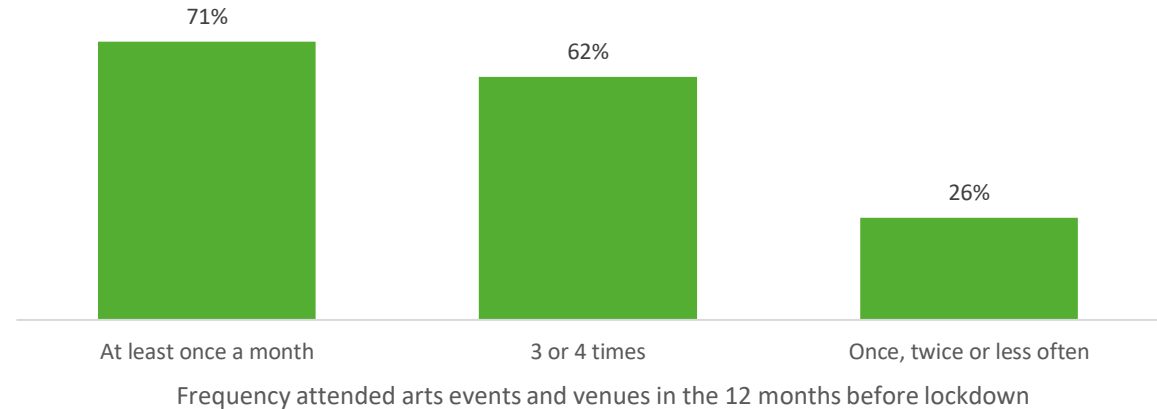
9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,003

# The proportion missing attending culture is significantly higher amongst those who previously attended events & venues regularly

- Figure 2 illustrates the percentage agreeing that they have missed going cultural events and venues during lockdown amongst those who previously attended at different levels of frequency.
- As might be expected, those who attended most often before lockdown also missed the opportunities to attend most often rising to 71% amongst those who had previously attended at least once a month.

Figure 2 –Percentage who agree with statement by frequency of attendance before lockdown

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



9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,003

# Nearly all of the population engaged in one or more at home cultural activity during lockdown

- The vast majority of the population (96%) engaged in one or more at home cultural activity during lockdown with significantly over half listening to music, watching films or other content on streaming services and/or reading for pleasure.
- As shown on the right, participation in most of these activities was highest amongst those who had normally attended cultural venues and events at least once a month prior to lockdown.
- Other variations in participation included the following differences by age:
  - Aged 16-34 : higher usage of streaming services, online gaming, listening to audiobooks & podcasts, watching online performances and attending online learning,
  - Age 55+: higher levels of reading for pleasure.

**Figure 3 – Activities undertaken at home during lockdown compared to frequency of pre-lockdown attendance**

		FREQUENCY OF PRE-LOCKDOWN ATTENDANCE		
		At least once a month	3 or 4 times	Less often or never
Listened to music	81%	84%	85%	71%
Watched films on streaming services (e.g. Amazon Prime Video, Netflix, Disney Plus)	63%	63%	69%	52%
Read for pleasure (not newspapers or magazines)	62%	72%	60%	49%
Watched drama or documentary series on streaming services (e.g. Amazon Prime Video,...)	60%	64%	64%	46%
Played online video games	36%	44%	32%	22%
Listened to audiobooks or podcasts	26%	33%	22%	13%
Watched arts performances online (e.g. plays, comedy, live streamed music)	21%	28%	20%	7%
Attended a remote learning/ online arts or culture related class or course	11%	16%	7%	5%
Went on online virtual tours of museums or galleries	10%	16%	5%	2%
Took part in an online arts or cultural activity for children	6%	11%	2%	1%
None of these	4%	1%	3%	10%

7) We would like you to think about the things you have been doing at home during lockdown, from the initial period after 23rd March to more recent phases as some rules have been eased. During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,003



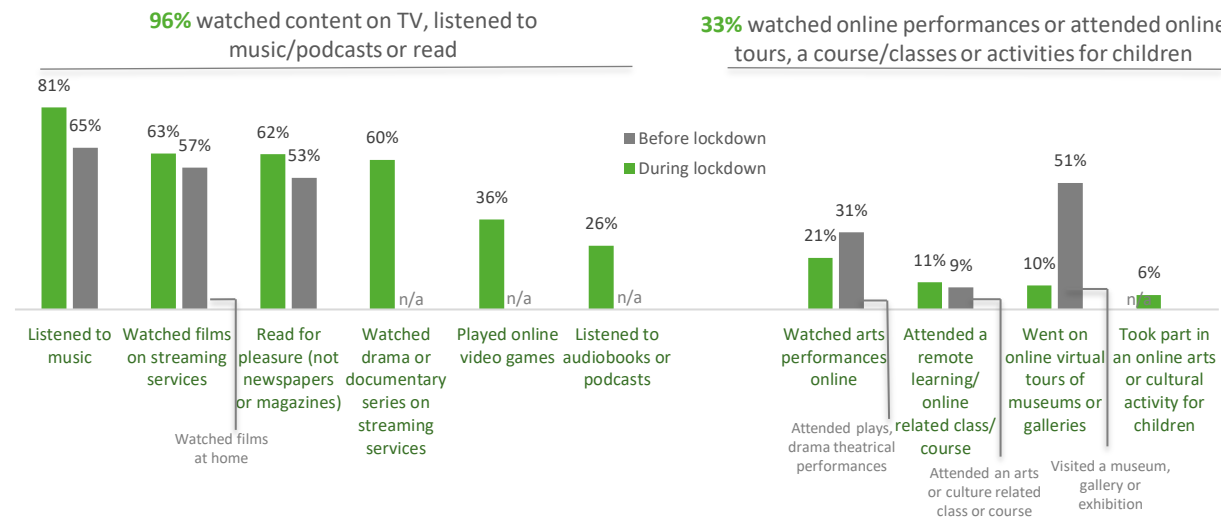
# Around a third of the population engaged with content which might substitute a physical attendance at a venue or event

Figure 4 distinguishing those cultural activities undertaken at home during lockdown where the participant viewed or listened to existing content, such as music or films, from those activities which provided more direct replacements for activities previously attended out of home - for example viewing arts performances online, attending online tours or attending courses of other activities online.

This distinction shows that the vast majority (96%) took part in the first set of activities, viewing or listening to existing content. Where data is available, we see increases in levels of participation in all of these activities compared to those seen before lockdown.

However a smaller percentage (33%) had participated in the other 'substitute' activities and, with the exception of attending classes, levels of participation in all of these activities were lower than the equivalent activities pre-lockdown.

**Figure 4 – Activities undertaken at home during lockdown - comparison to pre-lockdown participation** (pre lockdown definitions included where different. Listening to music, watching films and reading from 2019 Creative Scotland population survey)

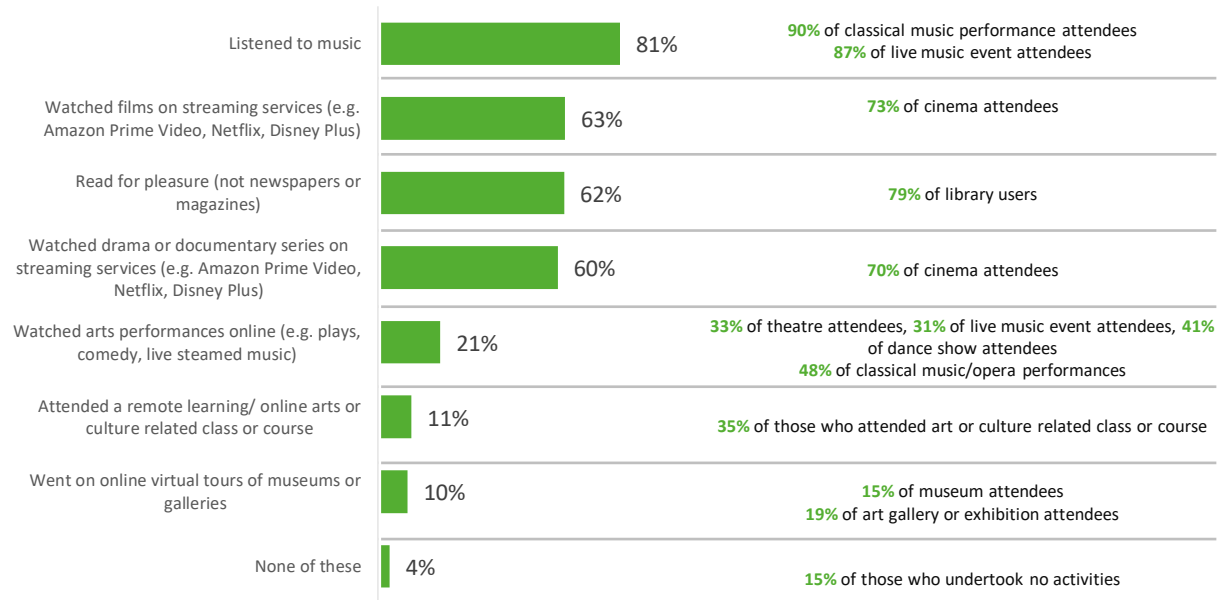


7) We would like you to think about the things you have been doing at home during lockdown, from the initial period after 23rd March to more recent phases as some rules have been eased. During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,003

# Those who attended arts and cultural events before COVID 19 were more likely to engage in related activities at home during lockdown

- Figure 5 compares the total population's levels of participation in at home cultural activities during lockdown with the levels recorded amongst those who took part in related 'out of home' cultural activities prior to the outbreak.
- In general those who took part in related activities pre-lockdown were much more likely to have subsequently participated at home during lockdown.
- For example, 73% of those who had been to the cinema before lockdown watched films on streaming services during lockdown - a higher percentage than across the population as a whole (63%).
- Similarly 10% of the total population went on online, virtual tours of museums or galleries, this percentage increased to 19% amongst those who had been to an art gallery or exhibition before lockdown,

Figure 5 – Activities undertaken at home during lockdown compared to event and venues attended pre-lockdown

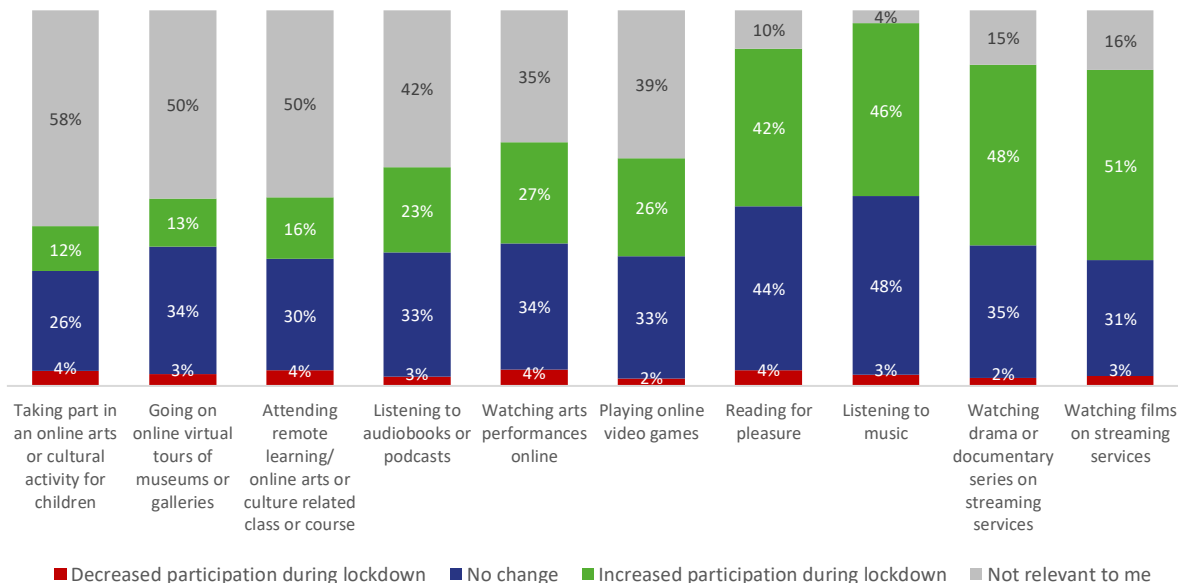


7) We would like you to think about the things you have been doing at home during lockdown, from the initial period after 23rd March to more recent phases as some rules have been eased. During this time, which of the following cultural activities, if any, have you done at home? Base, all respondents = 1,003

# Most of the population increased their participation in at home cultural activities during lockdown

- As shown in Figure 6, survey respondents were asked to indicate whether their participation in at home cultural activities had increased, decreased or not changed during lockdown. A response of 'not relevant to me' could also be provided.
- While less than 1 in 20 Scottish adults decreased their participation in any of the activities asked about, around half reported increasing their participation in listening to music or watching drama, documentaries or films on streaming services. Also two-fifths of the population reported spending more time reading for pleasure during lockdown.

Figure 6 – How participation levels have changed during lockdown



8) Compared to the same period in 2019, how much, if at all, has the amount that you do these cultural activities at home changed during lockdown? *Base, all respondents = 1,003*

# Participation at home increased across the board but particularly amongst those who previously attended frequently

Figure 7 summarises changing levels of participation in at home activities, comparing the percentage who increased participation with the percentage decreasing participation to obtain an estimate of the net change.

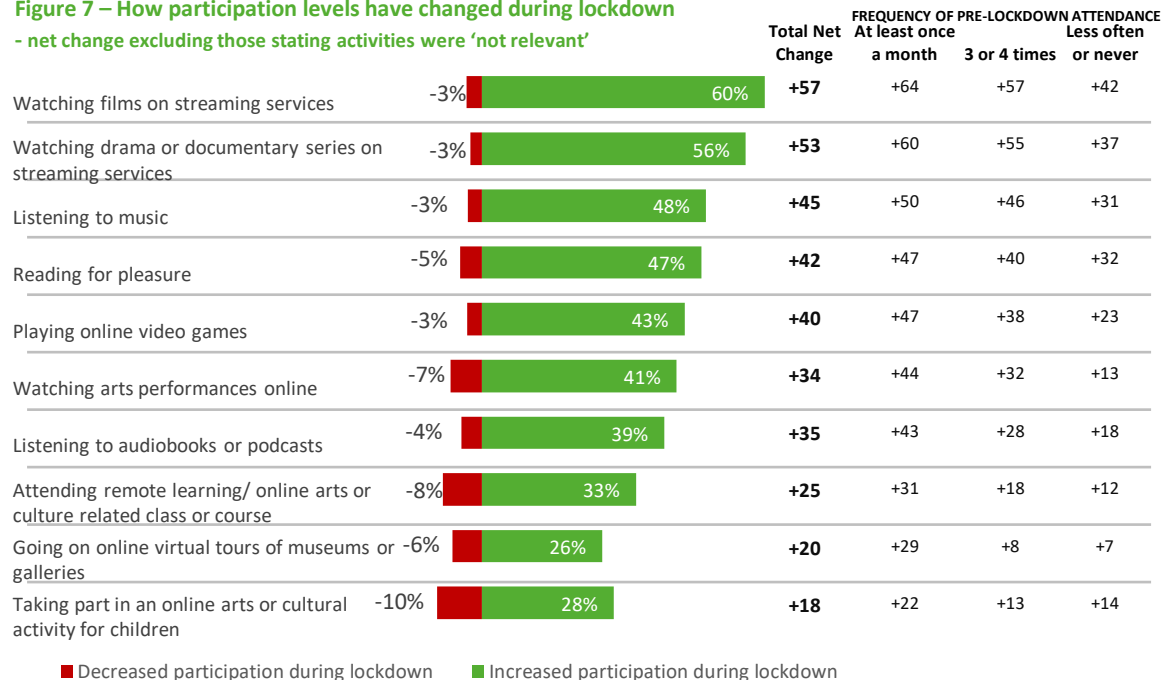
This comparison further illustrates the scale of increased participation in every activity, particularly watching streamed content, listening to music and playing video games.

Those people who attended cultural events and venues frequently before lockdown increased their participation in at home activities the most. Above average increases in participation were also recorded by particular demographic groups:

- **Watching films:** women (+60%), those aged 35-54 (+61%), residents of 10% least deprived areas (+67%).
- **Reading for pleasure:** women (+46%), aged 16-34 (+46%), residents of 10% least deprived (+49%).
- **Online gaming:** those aged 16-34 (+48%), residents of 10% most deprived areas (+45%).

**Figure 7 – How participation levels have changed during lockdown**

- net change excluding those stating activities were 'not relevant'



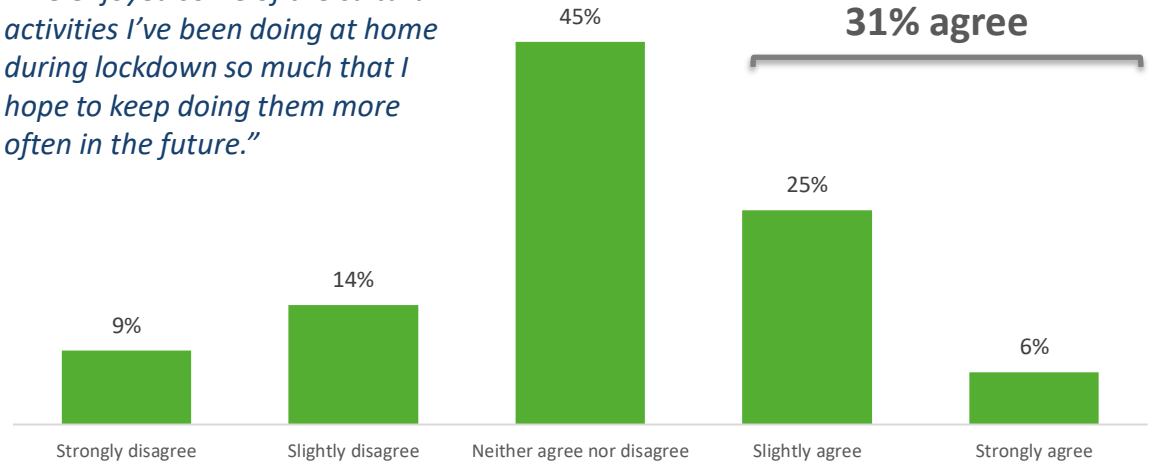


# Although most of the population have undertaken cultural activities at home in lockdown, fewer want to continue doing more in the future

- Although many people had experienced taking part in cultural activities at home more often during lockdown, most of the population did not expect this to become a longer term habit.
- Specifically, as shown in Figure 8, less than a third agreed that they had enjoyed the cultural activities they'd done at home so much that they would like to continue to do these more often longer term.

Figure 8 – Changing attitudes to cultural events and activities during lockdown

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



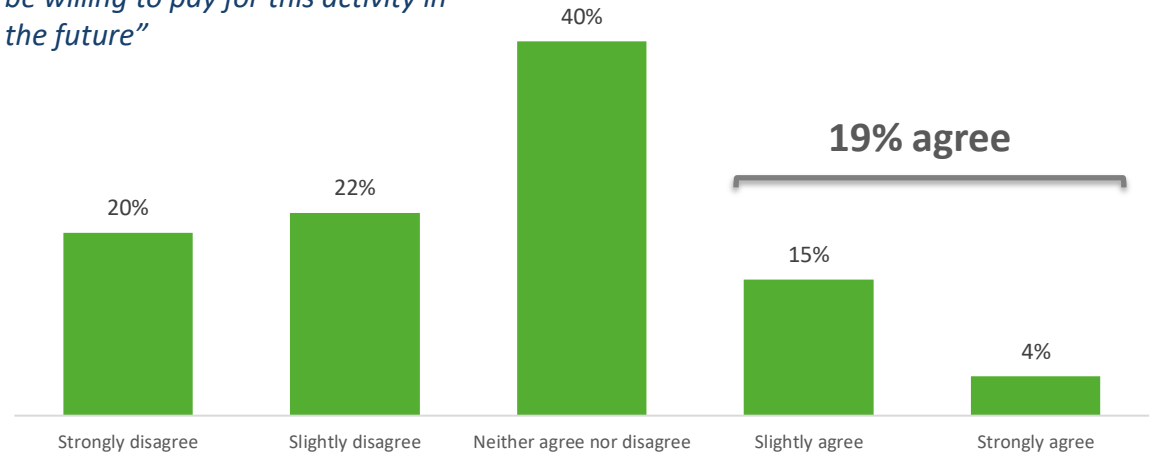
9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,003

# Only around 1 in 5 would be open to paying for the online cultural content they have seen during lockdown in future

- As shown in Figure 9, 19% of the population agreed that they would pay to access cultural activity online in the future while 42% disagreed with this statement (20% strongly).
- This suggests that at the population level there is a limited appetite for paid for content such as that experienced during the lockdown period.

Figure 9 – Changing attitudes to cultural events and activities during lockdown

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

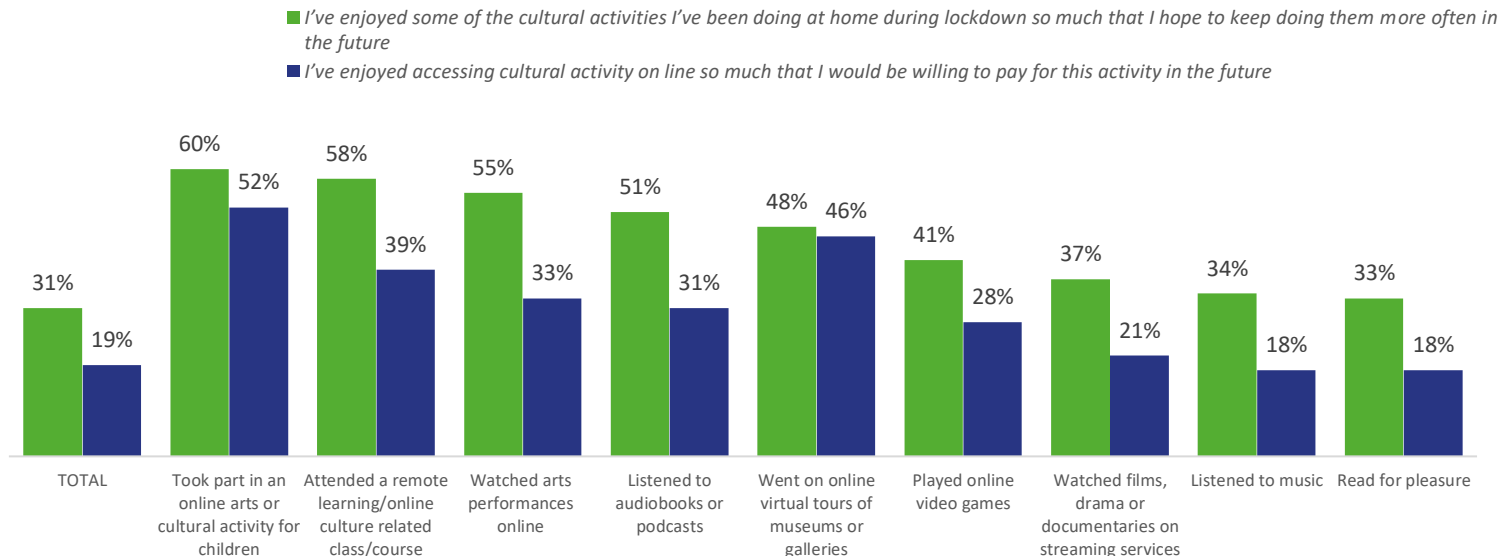


9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,003

# Openness to access more online cultural content or pay for it is higher amongst those who took part in certain activities in lockdown

Figure 10 – Percentage who agree with statements by activities undertaken at home during lockdown

- However, while the overall levels of interest in accessing and paying for online cultural content were low, levels of interest were higher amongst groups who had experienced certain types of content during the lockdown.
- As shown in Figure 10 levels of interest in attending more in future or paying were somewhat higher amongst those who had attended online activities for children or attended remote learning.



9) Others have said the following things about their experiences during lockdown. Thinking about how you feel, please indicate how much you personally agree or disagree with each. Base, all respondents = 1,003

Base, all respondents = 1,006

# Looking to the future

56°  
DEGREE  
INSIGHT





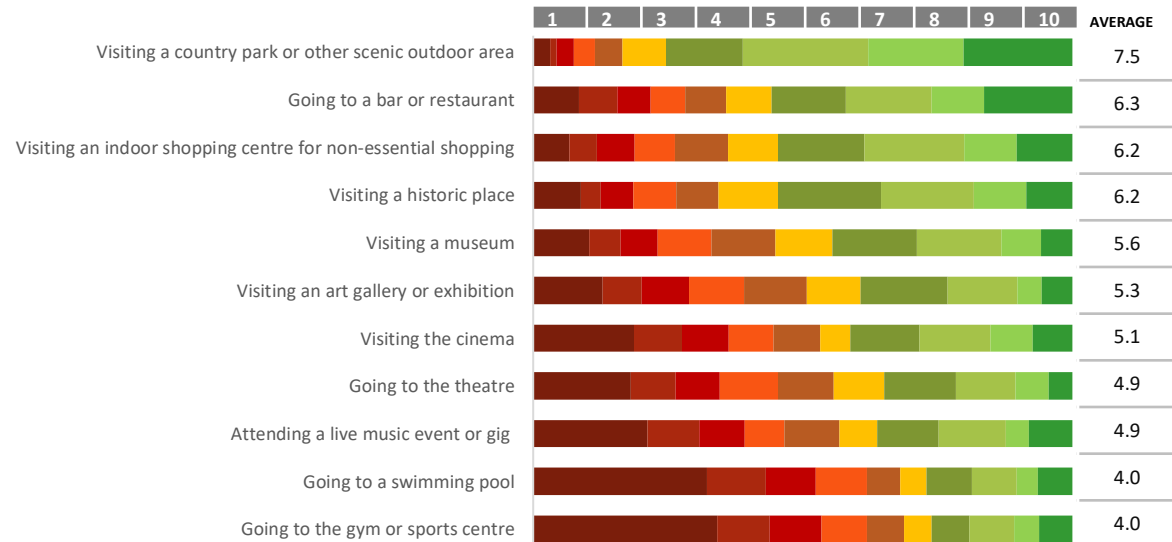
# Levels of desire to attend arts and cultural venues are polarised - while some are keen to attend when they can, others are extremely wary

- Respondents were asked to rate their desire to take part in a range of leisure activities, including some cultural activities and a number of comparators.
- While willingness to visit country parks and other outdoor areas were high (a average of 7.5 out of 10), levels of consideration for indoor activities were much more varied.
- The cultural activities included received particularly varied responses with similar percentages giving a rating of 5 or less as 6 or more.
- The average ratings for cultural activities ranged from 5.6 for visiting museums to 4.9 for attending a live music event.

**Figure 11 – Desire to take part in cultural and other leisure activities**

Thinking about how you feel at the moment, please rate each of the following activities on a scale from 1 to 10, where 1 is 'Extremely unlikely to be the type of activity I would consider doing' and 10 is 'Extremely likely to be the type of activity I would do'

- Where the activities are already possible because venues are open, base your answer on how you feel about doing them now.
- Where venues are still closed, base your answer on how you feel about doing them when they re-open

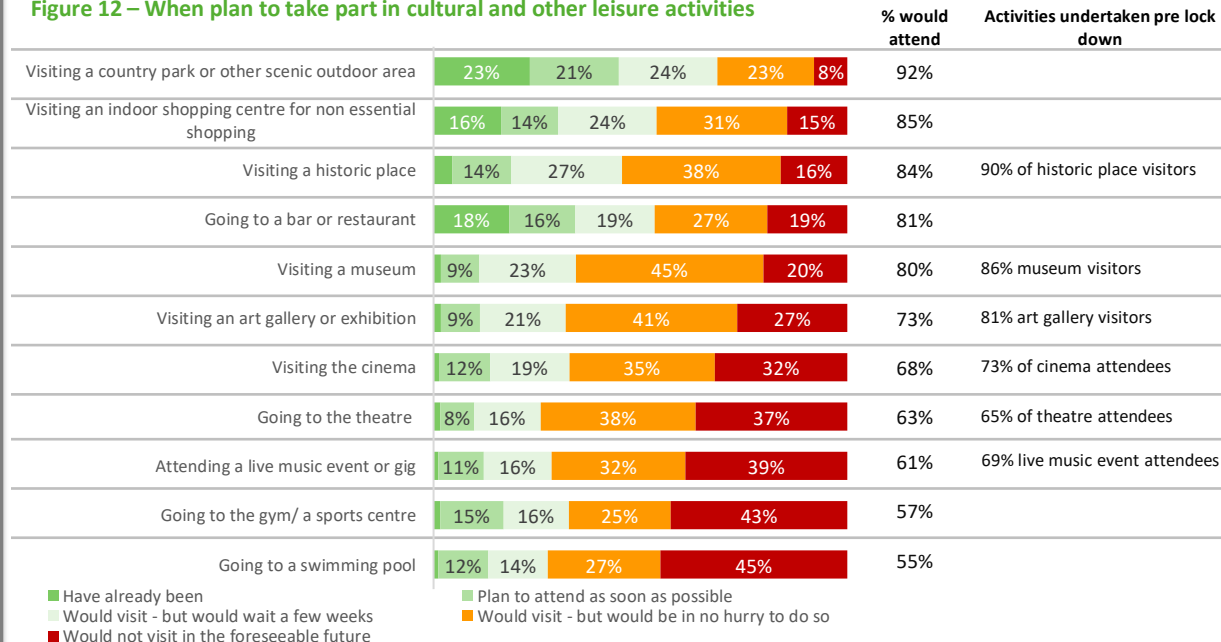


Base, all respondents = 1,003

# As things stand, most people feel that they will take their time or are altogether reluctant to return to arts venues

- When asked when they would visit the same list of cultural and other leisure activities, a similar order of responses was obtained as seen in the question relating to desire to participate again (see Figure 11).
- While 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, many stated that they would be in no hurry or would not visit cultural venues when this was possible.
- Figure 12 compares the percentages who would attend in future (including 'in no hurry') for the overall population and for those who took part in related cultural activities before lockdown.
- This comparison shows that while, for example 61% of the population would attend live music this percentage increased to 69% amongst those who had been to live music in the 12 months before lockdown.

Figure 12 – When plan to take part in cultural and other leisure activities



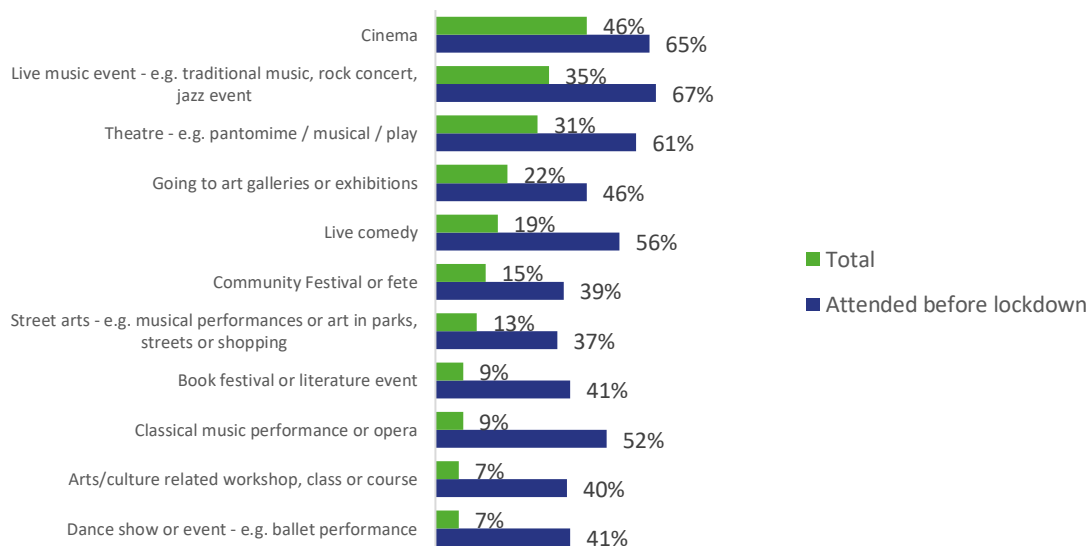
Q11 Which, if any, of the following best describes when, if at all, you would feel happy to go to each of these places once lockdown rules allow (excludes Don't Know and Not applicable responses for each activity). Base: all respondents = 1,003

# Those who attended before lockdown especially look forward to being able to return to the cinema, theatre and live music

- Respondents were asked to specify the arts activities they most look forward to attending again in the future. Figure 13 illustrates the overall population level results ('total') and the results amongst those who had attended each of these activities in the 12 months before lockdown.

- As would be expected people who attended in the 12 months before lockdown were much more likely to look forward to attending again in the future, however levels varied from 67% for live music events to just 37% for street arts.

Figure 13 – Arts and cultural activities most look forward to attending in future



Q12 Thinking in more detail about specific arts and cultural activities, which of the following, if any, do you most look forward to attending in the future when it is possible?}.  
Base: all respondents = 1,003

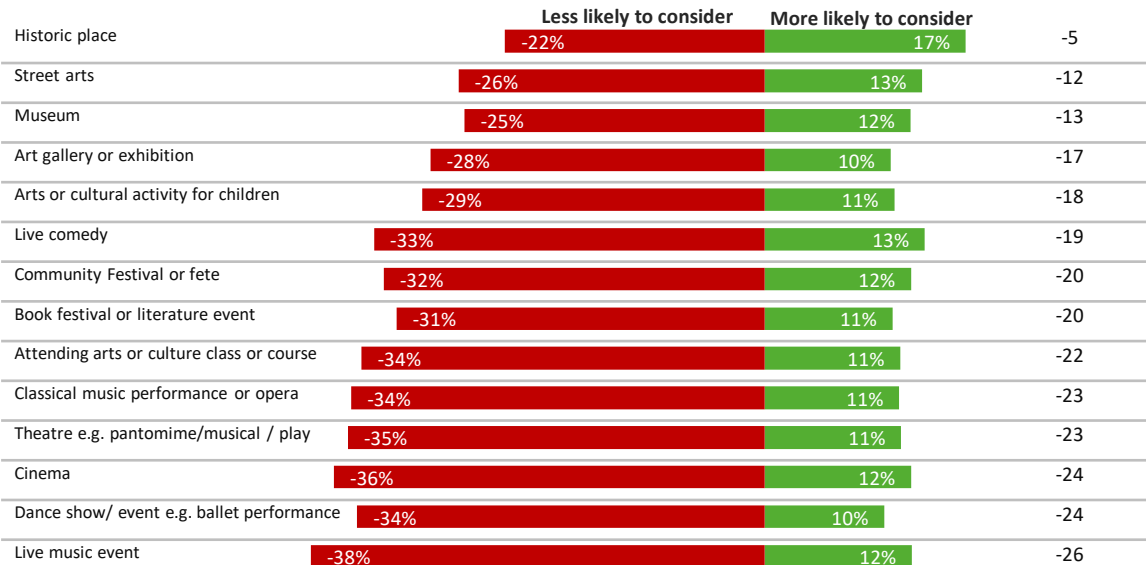
# Attendance in the new normal



# Future demand for all types of arts events are suppressed

- 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 options possible ('more likely to consider', 'no difference', 'less likely to consider' and 'would not have considered before and still would not').
- Figure 14 summarises the results excluding those who would not have considered an activity and including the net change (% more likely minus % less likely).
- On the whole demand for all of the cultural activities asked about is lower than before COVID 19.
- However this is more the case for certain activities than others. Activities which could feasibly take place outdoors (e.g. visiting historic places, viewing street arts) or in spacious, uncrowded venues (e.g. visiting museums, galleries) appear to be less negatively impacted than those where audiences may be 'packed' together in smaller indoor venues (e.g. live music).

Figure 14 – How preferences have changed as a result of COVID 19 outbreak

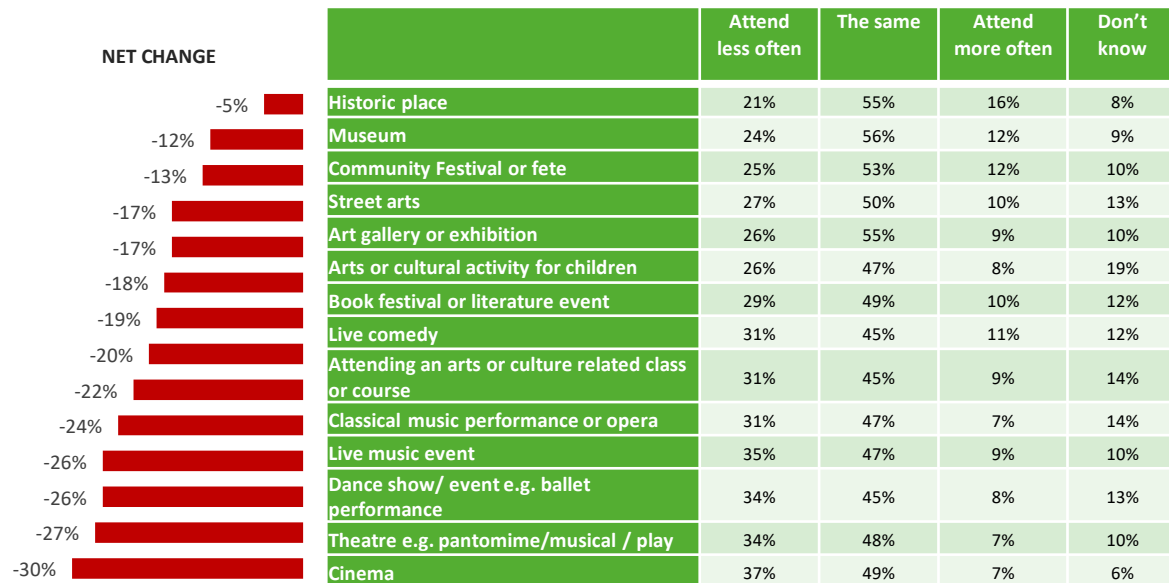


Q13A Please indicate the extent to which your preferences have changed (if at all) compared with what you might have chosen to do before the COVID-19 outbreak (NET changes in consideration, excluding those who would not consider in any case). Base: all respondents = 1,003

# While a large share expect to attend cultural events and activities at the same frequency in future, many others will attend less often

- The frequency that the Scottish population expects to attend arts events and venues has also decreased overall.
- Figure 15 illustrates that while for most of the activities asked about, around half of people expect that the amount they will take part in activities in future will be the same as before COVID 19, many others expect to attend less often.
- The net decrease in frequency of attendance is greatest for predicted attendances to live music events, dance shows, theatre and the cinema.

Figure 15 – How often expect to take part has changed as a result of COVID 19 outbreak



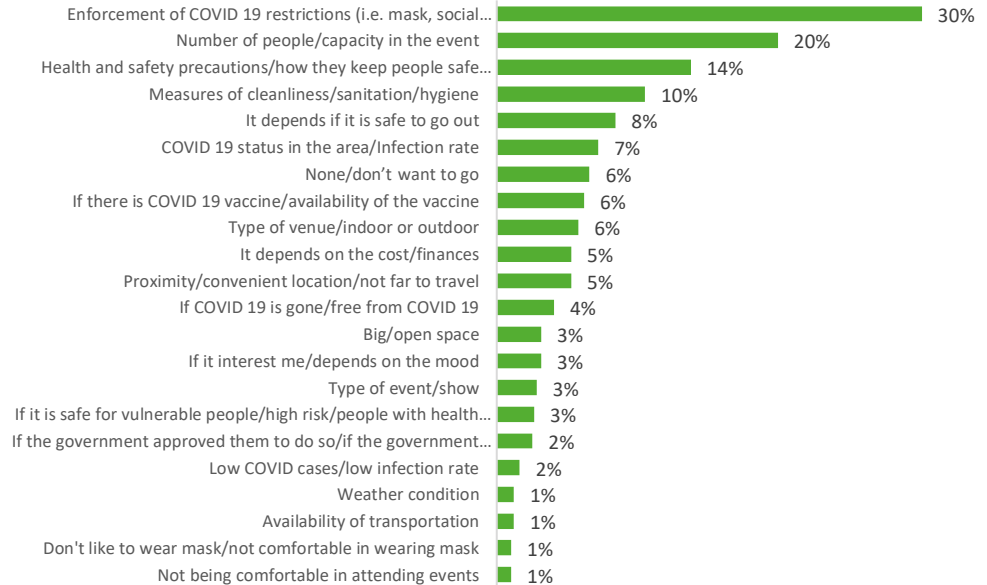
Q13B Compared to before the COVID-19 outbreak, do you expect to take part in these activities any more or less often in future, or at about the same level of frequency?  
Base: all respondents = 1,003



# Clear enforcement of COVID 19 restrictions and the number of other people in the venue are key factors when people are choosing to attend

**Figure 16 – Factors important when deciding on whether to attend arts and cultural activities**

*In your own words, please tell us about the factors that would be important when you are deciding on whether to attend different arts and cultural activities such as those listed in the last question? For example, give details on what would affect your decision to go at all and when and where to attend.*



Base: all respondents = 1,003

- Respondents were asked to comment on the factors that would be important to them when deciding on whether to attend different arts and cultural activities.
- The most frequently provided responses related to having 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.
- Some of the responses provided to this open ended question are shown on the next page.

# Clear enforcement of COVID 19 restrictions and the number of other people in the venue are key factors when people are choosing to attend

*In your own words, please tell us about the factors that would be important when you are deciding on whether to attend different arts and cultural activities such as those listed in the last question? For example, give details on what would affect your decision to go at all and when and where to attend...*

*I would only go to venues or events where social distancing was possible, numbers of visitors were limited and where strict hygiene measures were in place.*

*I would need reassurance that social distancing is being enforced, that the premises are cleaned thoroughly, that face masks are mandatory, and that hand sanitising facilities are provided.*

*There would have to be adequate maintained social distancing. Anything with large crowds in close proximity would mean I would not attend. Therefore outdoor activities with social distancing would have more chance*

*I would consider the numbers of people present, how crowded they would be and how easy I could distance from others.*

*The size of the crowd would be the main factor so an indoor music show where people are standing would just be too risky. Seemed venues with better spacing might be okay but entry and exit would need to be controlled so there is no congestion. Other activities where there are no crowds are less of a risk.*

*I would not like to be inside in enclosed space i.e. a cinema, theatre etc for a very long time even if I was told it was fine to do so*

*Everything to be organised and clean so everybody can enjoy safely their time while taking part in any events*

Base: all respondents = 1,003

# Assurances on safety are needed for many to feel comfortable attending indoor arts venues in future

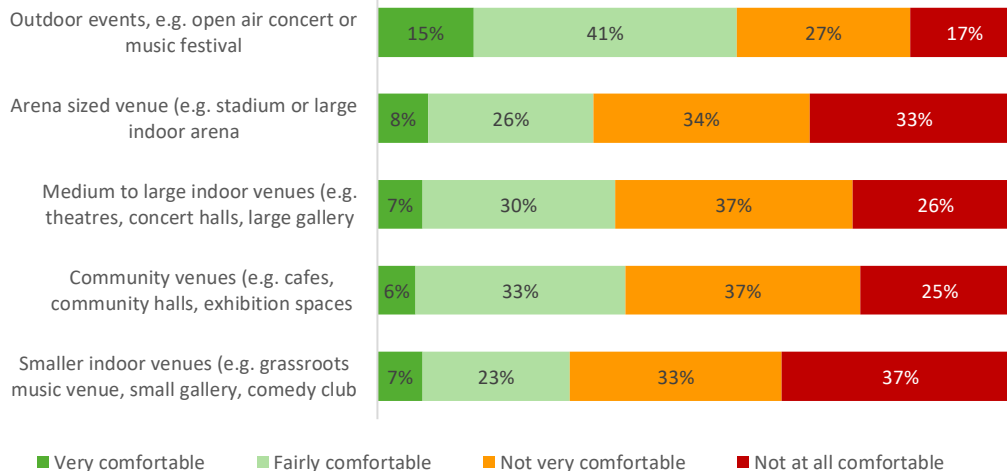
Respondents were asked how comfortable they would feel attending performances at a range of venue types. Responses could be selected from the following range:

- *Very comfortable – no difference in appeal to before COVID 19*
- *Fairly comfortable – would attend whilst staying aware of and avoiding any risks*
- *Not very comfortable – would prefer not to attend unless I had assurances on safety measures in place*
- *Not at all comfortable – would avoid for foreseeable future*

While over half felt very or fairly comfortable attending outdoor events, large proportions would not attend the other types of venue for the foreseeable future or would only attend if they had assurances on safety measures in place.

In general people aged 16-34 were more likely to state that they felt comfortable returning to any of the venues asked about while people aged 55+, those with a disability or long term health condition, residents of rural areas and those who infrequently or never attended arts events before were least comfortable.

Figure 17 – Level of comfort going to different types of venue to watch performances in future

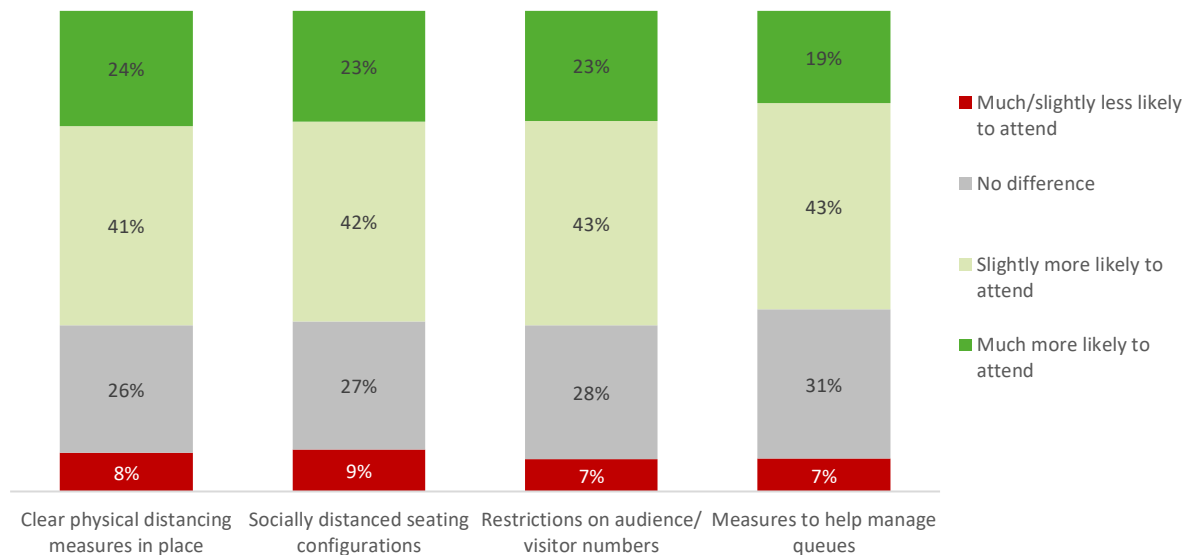


Q15 Thinking more specifically about the types of place that arts and cultural activities could take place in, how do you feel about going to the following types of place to watch performances in the near future? Base: all respondents = 1,003

# Measures to support social distancing would make up to a quarter of the population much more likely to attend

- Respondents were shown a list of potential changes and mitigations and asked to what extent each of these would influence their willingness to attend a cultural event.
- Reflecting some of the previous comments on factors important to people when deciding whether to attend, the measures relating to social distancing were most likely to have a positive impact on likelihood to attend.
- In particular a quarter of the population would be much more likely to attend if:
  - Clear physical distancing measures were in place;
  - Socially distanced seating configurations were used;
  - There were restrictions on audience/visitor numbers.

**Figure 17 – Impact of mitigations and other potential changes on willingness to attend arts and cultural venues – changes related to social distancing**



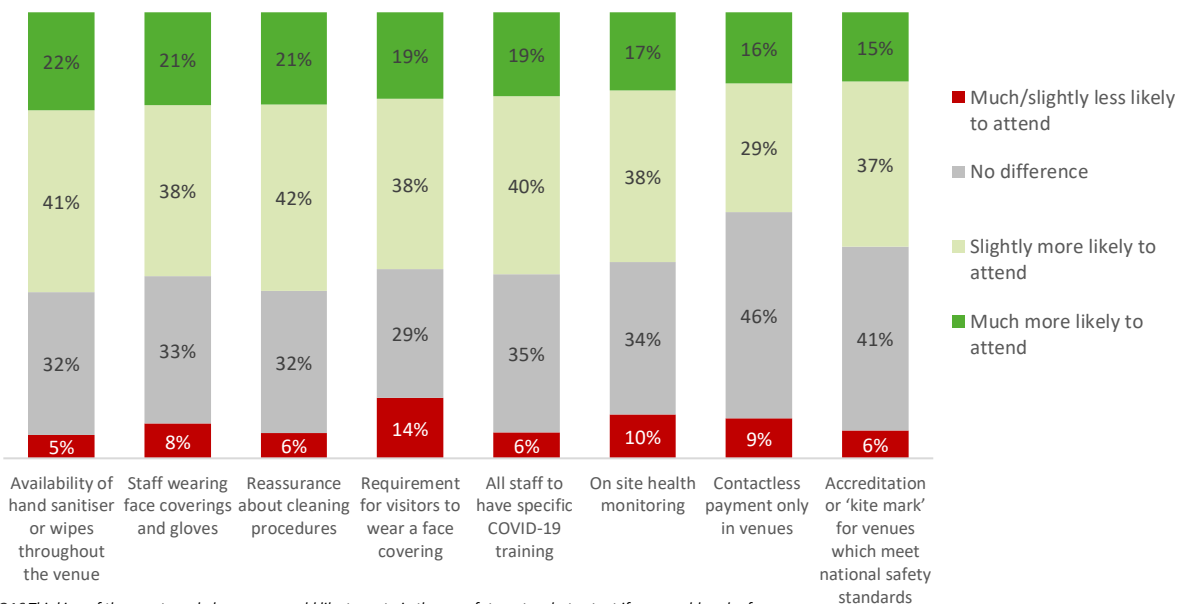
Q16 Thinking of the events and places you would like to go to in the near future, to what extent if any would each of these measures influence your willingness to attend? Base: all respondents = 1,003

Base, all respondents = 1,006

# Enhanced cleaning and hygiene and other measures designed to reduce the risks of infection would also make a difference for many

- While measures relating to social distancing would have the greatest positive impact on willingness to attend, other measures which were designed to reduce the risks of spreading the virus would also make a positive difference for many.
- Specifically, just over a fifth of the population would be much more likely to attend if the following steps were taken:
  - Hand sanitiser/wipes available throughout the venue;
  - Staff wearing face coverings and gloves;
  - Reassurance about cleaning procedures.
- Notably asking audiences/visitors to wear a face covering received a more mixed reaction – while 19% would be much more likely to attend, 14% would be less likely to attend.

**Figure 18 – Impact of mitigations and other potential changes on willingness to attend arts and cultural venues – other changes related to reducing infection risk**

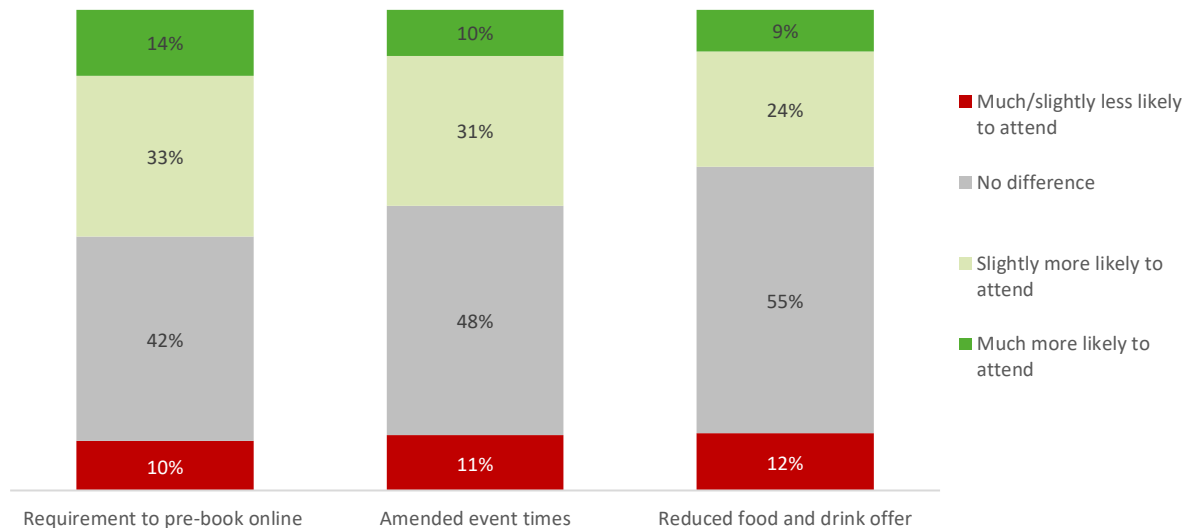


Q16 Thinking of the events and places you would like to go to in the near future, to what extent if any would each of these measures influence your willingness to attend? Base: all respondents = 1,003

# Other measures such as changing booking processes or reducing the catering offer would do less to increase willingness to attend

- Some of the other ideas tested which related to a change in the offer provided would make little or no difference to most people and might discourage attendance for some.
- Compared to the changes more explicitly linked to managing social distancing and increasing cleanliness and hygiene, these changes would be less likely to attract audiences back to events and venues.

Figure 19 – Impact of mitigations and other potential changes on willingness to attend arts and cultural venues – changes to the offer



Q16 Thinking of the events and places you would like to go to in the near future, to what extent if any would each of these measures influence your willingness to attend? Base: all respondents = 1,003

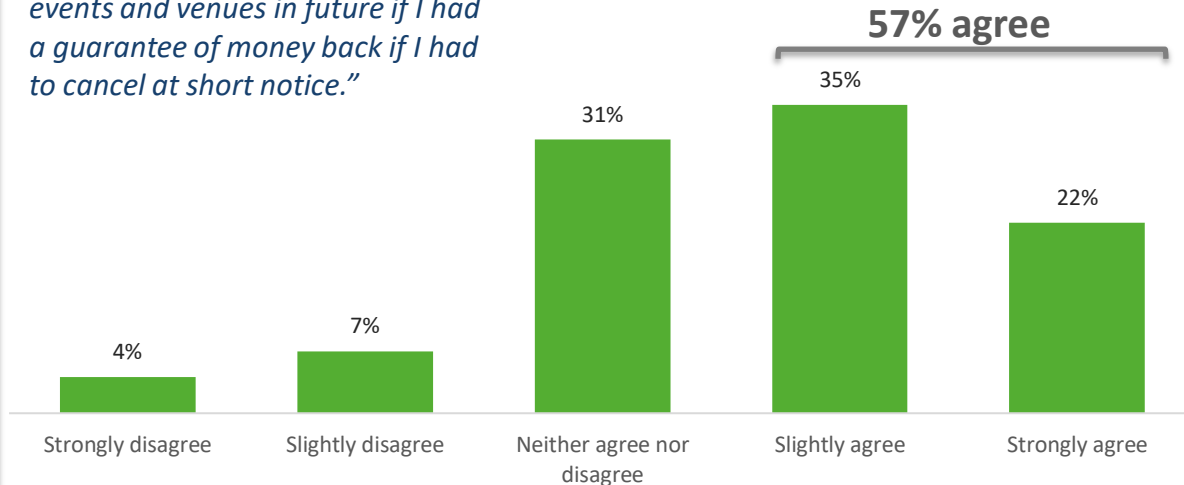


# The idea of a money back guarantee for cancellations is welcomed

- As shown in Figure 20, the idea of a money back guarantee in the event of a short notice cancellation was received positively with over half of the population likely to only book events and venues in future if this was possible.

Figure 20 – Attitudes to attending events in the future

*“I would only book to go to cultural events and venues in future if I had a guarantee of money back if I had to cancel at short notice.”*



Q18 Still thinking to the future, please indicate if you personally agree or disagree with the following statements Base: all respondents = 1,003

# 4 in 5 Scots are interested in attending new types of arts events, in particular drive in cinema and open air performances

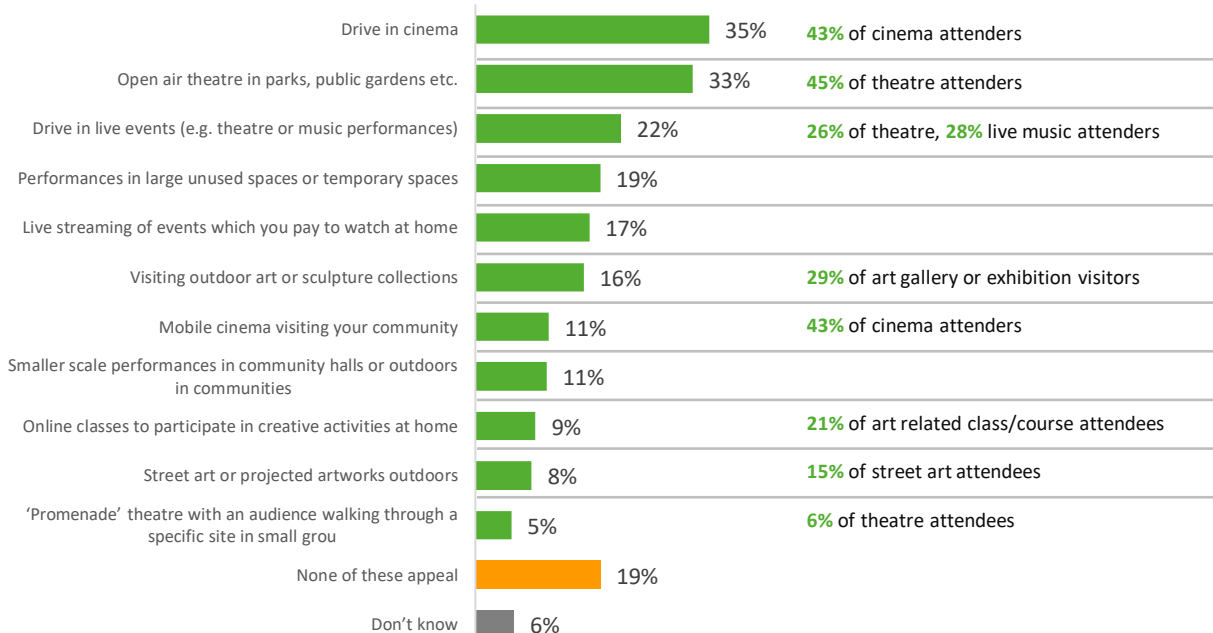
- 35% of the Scottish population are interested in attending drive in cinema and 33% are interested in open air theatre. These percentages increase amongst those who previously attended cinema or theatre (43% and 45% respectively).

- A number of the other places and events tested also received a fairly high level of interest, particularly amongst those people who attended similar types of event before lockdown.

- Overall 81% of the population stated that they would be interested in attending one or more of the options shown. This proportion increased to 85% amongst those who had previously attended arts events or venues at least monthly, 84% amongst women and 90% amongst people aged 16 to 34.

- Levels of interest amongst the 16-34 age group were especially high for drive in cinema, drive in live events, mobile cinema and online classes (47%, 30%, 17% and 16% respectively).

Figure 21 – Interest in attending new types of place to visit and events to attend



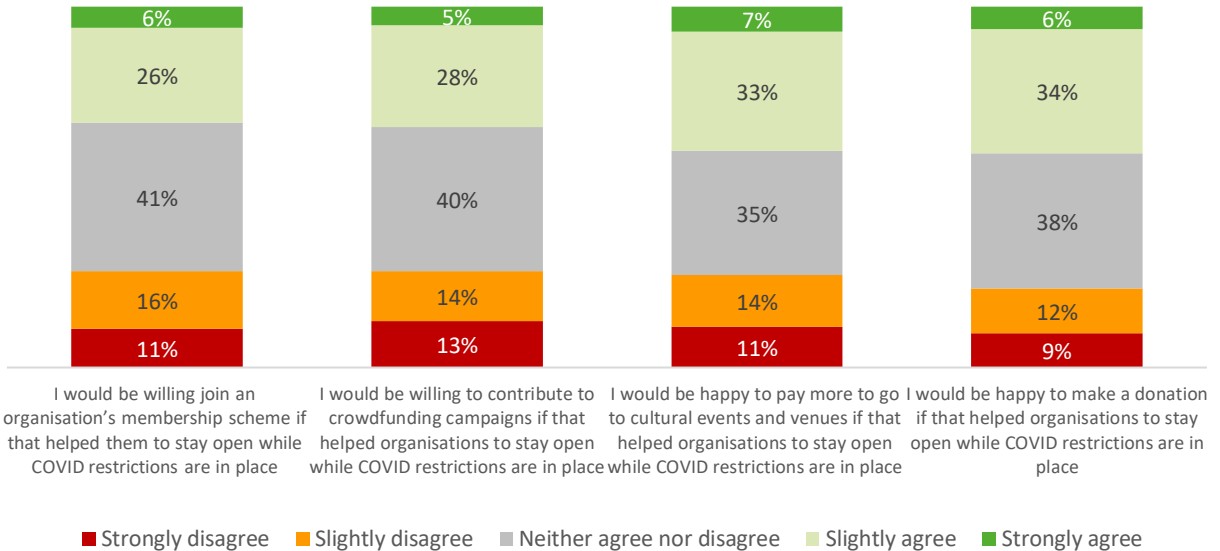
Q17 Given the restrictions places on arts venues and performers at this time, a number of ideas have been proposed for new types of places to visit and events to attend. Which of the following would you be most interested in attending if offered in your local area? You may choose up to 3. Base: all respondents = 1,003

# There is fairly limited support for increased prices or charitable donations

- Views on providing support to the arts through increase entrance charges, charitable donations, increased entrance charges or membership schemes are varied with around a third of the population generally open to joining membership schemes or providing a charitable donation to support arts organisations.

- In general agreement for all of these statements was higher amongst people who previously attended arts events and venues at least monthly and amongst women.

Figure 22 – Attitudes to payment and funding of arts events in the future



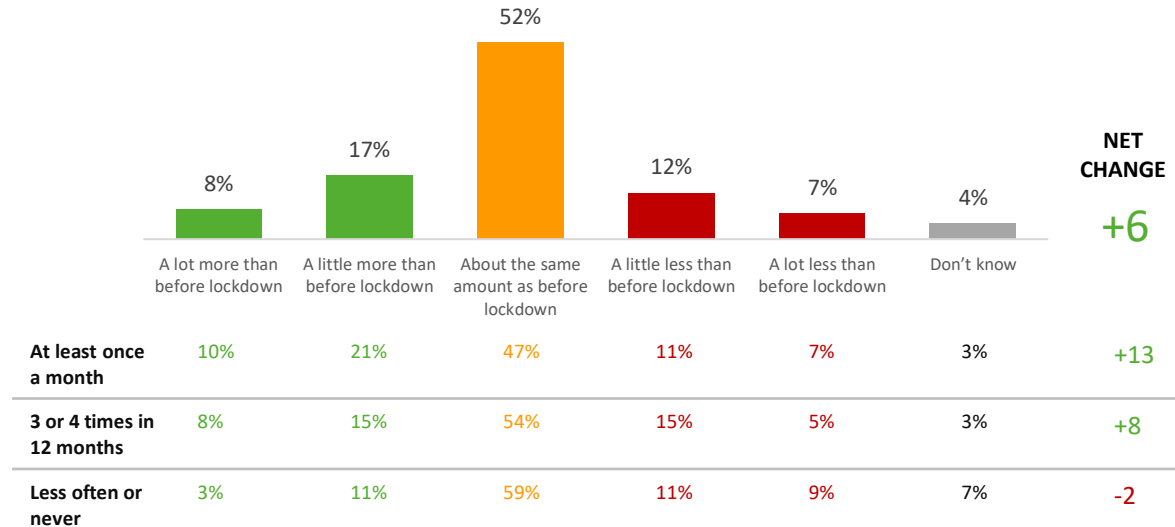
Q18 Still thinking to the future, please indicate if you personally agree or disagree with the following statements Base: all respondents = 1,003

# If a vaccine is generally available or the virus is eradicated, attendance levels could return to previous levels but not across all population groups

- In the event of a vaccine becoming available or the virus being eradicated, while half of the population would expect to attend the arts at the same levels as before COVID 19 and a 25% claim they would attend more often, almost a fifth expect that they would attend less.
- Those people who prior to lockdown had attend the arts most often were the most likely to attend more often than before while those who were previously very infrequent or non-attenders were most likely to expect to continue to attend less often or did not know what they would do.
- In general younger age groups were most likely to expect to increase their overall participation (34% would do more v 19% would do less).

**Figure 23 – Expected attendance of arts and cultural events and venues in future if the virus is eradicated or a vaccine is found**

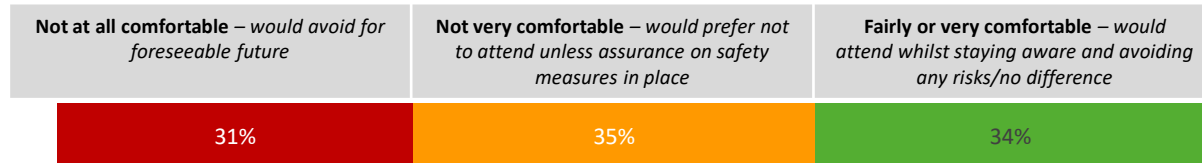
Imagine a scenario where a vaccine for COVID 19 is found or the virus is eradicated and we can return to the same conditions as before lockdown, with no more need for physical distancing or other precautions. Compared to before lockdown how often would you expect to go out to visit and attend arts and cultural events and venues?



Base, all respondents = 1,006

# Overall around a third of the population are comfortable attending cultural events in the near future

Figure 24 – Segmenting audience by confidence in attending venues - profile



## Most looking forward to returning to:

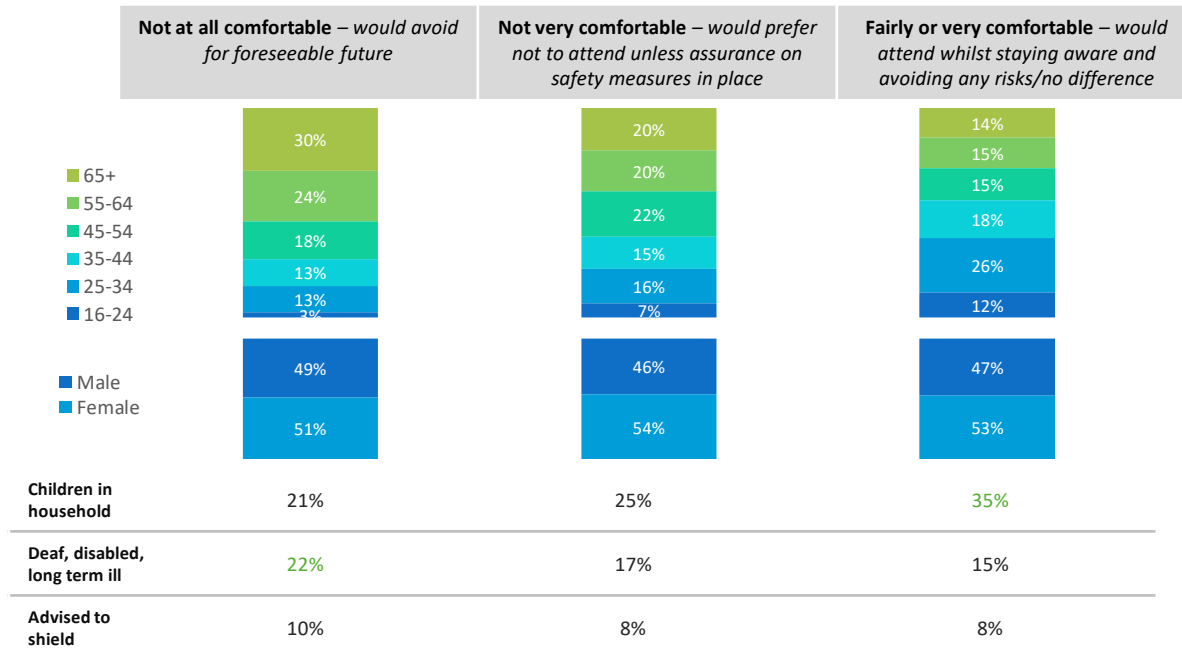
Activity	Not at all comfortable	Not very comfortable	Fairly or very comfortable
Cinema	54%	67%	64%
Live music	30%	36%	44%
Theatre	36%	41%	38%
Galleries	49%	54%	49%
Comedy	15%	20%	22%
Willing to pay more:	29%	44%	46%

- To better understand the ‘best prospects’ for indoor venues in Scotland as the sector reopens, the population was segmented into the 3 groups shown in Figure 24, based on an average of responses relating to levels of comfort attending events at small and medium sized venues in the near future (see page 29).
- Taking this approach, the population is fairly equally split between those people who are ‘not at all comfortable’ and would avoid attendance completely, those who are ‘not very comfortable’ whose attendance would depend greatly on the safety measures in place and those who were either ‘fairly or very comfortable’ who would attend now, whilst remaining aware of the risks.
- Correspondingly the culture desire index (see page 21 - average of responses for cultural activities) is higher for those who are comfortable, this group are particularly looking forward to returning to a range of types of event and the most willing to pay more.

# People who are most confident in attending in the near future tend to be younger and are more likely to have children at home

- Figure 25 illustrates the key demographics of each of the three levels of confidence groups.
- This analysis clearly illustrates how those who are comfortable are more likely than the other groups to be aged under 45 (a quarter aged 25-34) and/or more likely to have children at home.
- In contrast, those people who stated that they were not at all comfortable and would be avoiding attending indoor venues for the foreseeable future were more likely to be in the oldest age groups and/or to have a long term illness or disability.

Figure 25 – Segmenting audience by confidence in attending venues – key demographics

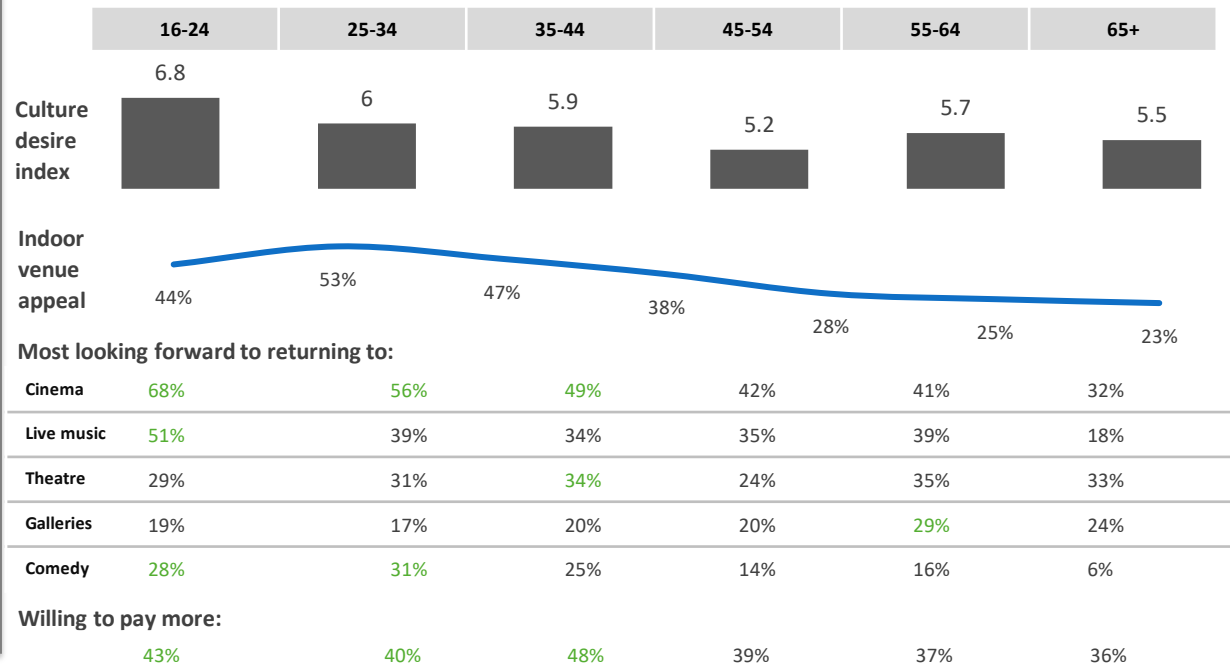




# Desire to attend and comfort to go to indoor venues is highest amongst young age groups with cinema, live music and comedy appealing most

- Figure 26 provides an analysis of how key attitudes to attendance in future change by age group.
- This further illustrates the higher levels of desire to return to cultural activities and comfort in attending indoor venues amongst younger age groups.
- Compared to older people, demand amongst these younger age groups is particularly high for cinema, live music and live comedy.
- A large percentage would be willing to pay more given the current circumstances, increasing to nearly half of those aged 35 to 44.

Figure 26 – Profile by age



# Conclusions



## The underlying demand to attend cultural events and venues remains strong

While many of the population have engaged with art and cultural activities at home during lockdown, for most this has been in the form of activities they might normally have done before, albeit they have spent much more time doing them during lockdown.

This includes watching films on streaming services, listening to music and podcast and reading books.

However only around a third have done activities which may be seen as seeking to 'replace' physical attendance – for example watching live performances streamed online, taking virtual tours of galleries or participating in online arts related classes.

Notably, following these experiences at home, less than a third of the population would like to continue to consume arts and cultural activities online more often into the future and even fewer would be willing to pay for the experience.

Conversely, the majority of the population had told us that they really miss the opportunity to go to cultural events and venues and this increases to almost three quarters of those who previously attended at least monthly.

**These findings suggest that there is undoubtedly an appetite amongst the population to get out and attend 'real' arts and cultural events and venues again. While people have spent time engaging with culture at home, doing what they can given the circumstances, for most these activities have not provided a substitute - so the demand to attend physical event and venues remains strong.**

## Taking steps to ensure social distancing and provide confidence is vital to attract back audiences

While underlying demand to attend cultural events and venues again exists, when it comes to the reality of getting back out there, while a minority of the population are ready to go as soon as possible, a larger proportion are feeling cautious and have concerns around the ongoing health risks.

The main factor driving concerns is the desire to avoid crowds and being able to maintain social distance.

As such activities which could be undertaken outdoors or in spacious venues are more appealing than those which could involve a more confined, indoor location close to other people.

For the large part of the population who would like to attend again but are feeling nervousness, levels of openness to attending could be improved if measures were put in place to ensure physical distancing (e.g. clear signage and enforcement, socially distanced seating, restrictions on audience numbers) and to demonstrate that best practice was being followed to ensure cleanliness and hygiene.

Furthermore given financial concerns and (possibly rising) awareness of the potential of local lockdowns, providing a money back guarantee in the event of short notice cancellation would further improve the appeal of events as venues reopen.

**The 'best prospects' for returning to indoor venues are younger people in pre-family lifestyle and families with kids at home.**

Around a third of the population feel comfortable attending cultural activities in indoor venues in the near future. This group also express the highest levels of desire to take part in cultural activities and openness to paying more to help venues to stay open while COVID restrictions are in place.

Members of those group who are most willing to attend now are more likely than those who feel less comfortable to be most looking forward to getting back to the cinema and being able to watch live music and comedy.

**Indoor venues could attract a greater volume of customers back by targeting these more confident demographic groups and providing the content which they are most looking forward to seeing again.**

## Audiences are open to trying new experiences at different types of venue

Reflecting concerns around social distancing and crowds, the appeal of outdoor events and events at larger venues is much higher than for smaller ones, in particular if attendees also feel assured that safety measures such as social distancing and enhanced hygiene are in place.

Related to this, levels of interest in attending arts activities which are in these types of more appealing location and where the desired safety measures can be in place are high, especially amongst those people who have previously attended similar activities. In particular drive in cinema, drive in live event and open air theatre appeal.

In designing these events it should be borne in mind that, given the impact of coronavirus on the sector, around a third of the population are open to paying more or providing a financial contribution in other ways (e.g. a donation or membership). However this level of support is fairly 'soft' and many consumers will be suffering economically due to the crisis so increased pricing needs to be considered carefully.

**The aforementioned underlying demand to attend cultural activities whilst feeling safe suggests that until a vaccine is found, these types of event could provide an opportunity for the sector, particularly if targeted at those who previously attended related events who miss attending the most.**



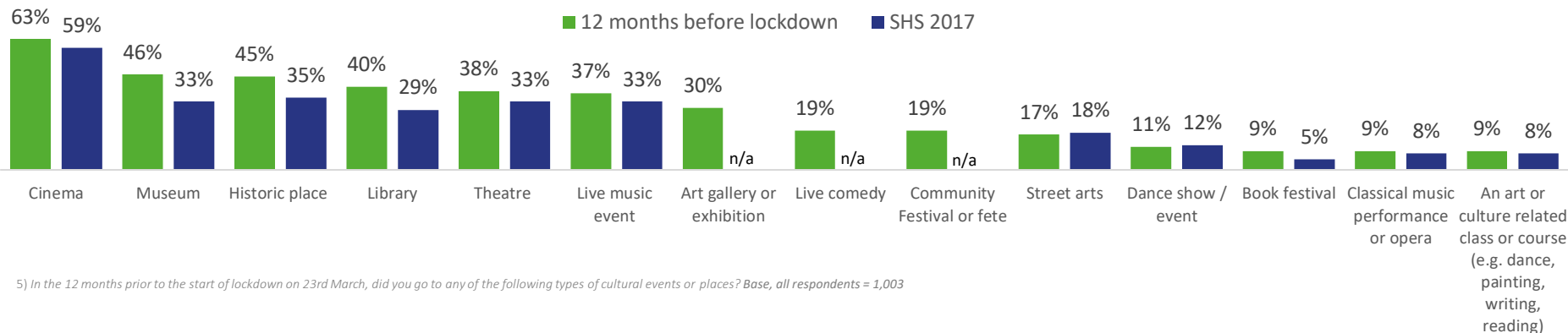
# Annex: Attendance before COVID 19



# Almost 9 in 10 Scots attended arts and cultural events and venues in the year before lockdown

- The profile of activities and places attended in the 12 months prior to the start of lockdown on 23<sup>rd</sup> March 2020 broadly reflected those recorded in the Scottish Household Survey with 88% of the population attending at least one of the types of place and event included.
- Also reflecting the Scottish Household Survey results, attendance levels were found to be highest amongst the most affluent socio-economic groups, urban residents and residents of the least deprived areas.

Figure 24 – Cultural events and places attended in the 12 months before lockdown

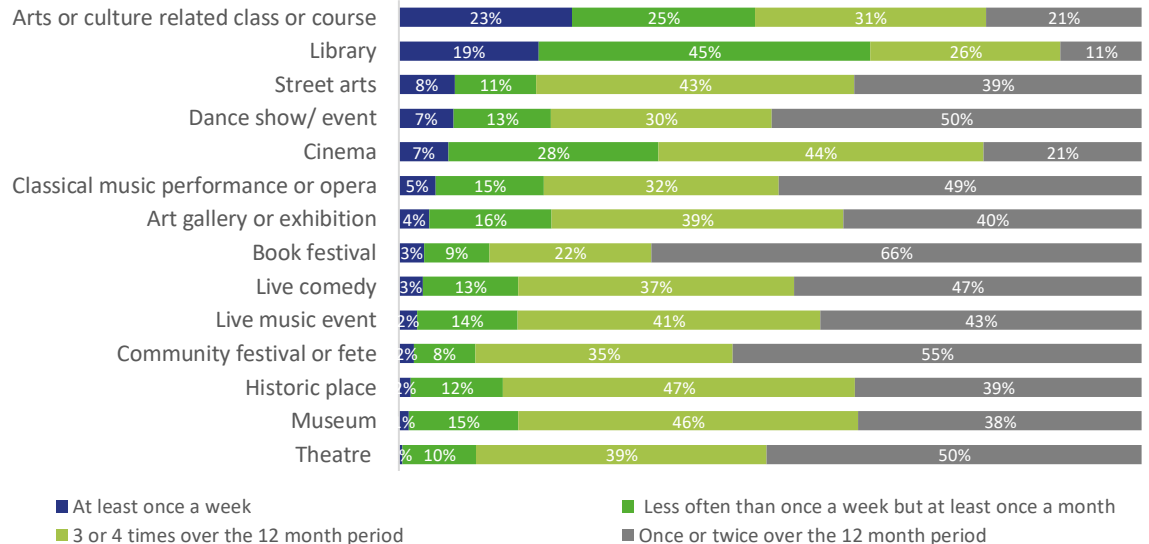


5) In the 12 months prior to the start of lockdown on 23<sup>rd</sup> March, did you go to any of the following types of cultural events or places? Base, all respondents = 1,003

# Frequency of pre-lockdown attendance varied somewhat by activity and venue type

- Those respondents who had attended arts or cultural events and venues before lockdown were asked to state how often they tended to do these activities.
- Frequency of attendance was highest for arts and culture related classes and courses, with around a quarter participating at least weekly.
- Conversely, other activities such as visiting book festivals or going to the theatre were more likely to be attended just one or twice over the 12 month period.

**Figure 25 – Frequency of attendance in the 12 months prior to lockdown (based on those who participated at all in each activity)**

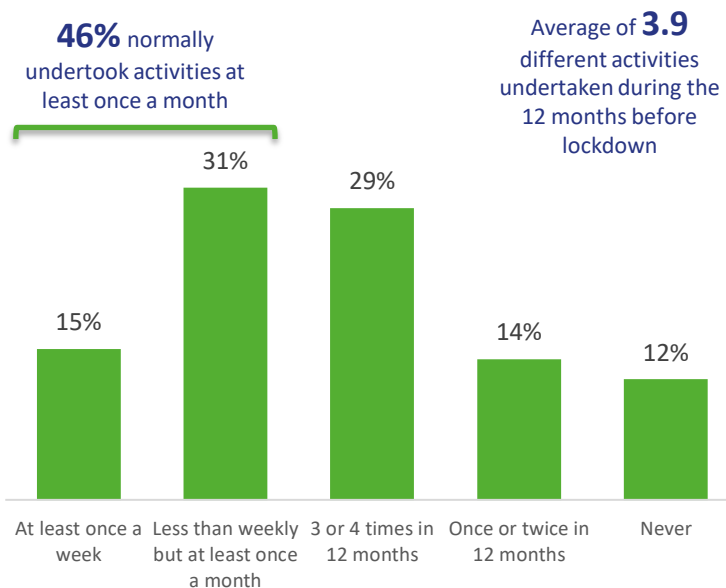


6) How often did you go to this type of event or place during the 12 months before lockdown? (based on those undertaking each activity at any point in last 12 months)

# Before lockdown almost half of the population normally attended arts events and venues at least once a month

- Using responses on the frequency of attendance to different types of venue and event it may be estimated that in the 12 months prior to lockdown 15% of the population normally attended one or more arts events or venues every week while a further 31% attended at least once a month.
- The average adult in Scotland had attended 3.9 different types of venue or event in the 12 months prior to lockdown.
- As shown in the table on the right, levels of attendance and the number of different activities attended were highest amongst those aged 16-34, members of the most affluent AB social classes, residents of the least deprived areas and residents of urban areas.

Figure 26 – Summary of frequency of attendance in the 12 months prior to lockdown



	Attended at least once a month	Number of art forms in 12 months
<b>Sex</b>		
Male	46%	3.8
Female	46%	3.9
<b>Age</b>		
16-34	51%	4.2
35-54	49%	3.9
55+	40%	3.6
<b>Socio-economic</b>		
AB	52%	5.0
C1	43%	3.7
C2	47%	4.0
DE	41%	2.8
<b>SIMD</b>		
10% most deprived	44%	2.8
10% least deprived	51%	5.0
<b>Urban/Rural</b>		
Urban	50%	4.1
Rural	36%	3.5



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