

Scottish Audiences Summary

From the COVID-19 Cultural Participation Monitor

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This report summarises results for Scotland from the first wave of The Audience Agency's COVID-19 Monitor, a nationally-representative online survey of the UK population and their experiences and responses to COVID, particularly in relation to cultural engagement. The wave 1 sample of 6,055 responses was carried out between Oct and Nov 2020.

This report draws out some headline figures and key differences for Scotland, compared to the UK overall, or other nations and regions. More details are available from The Audience Agency on request.

Summary of Findings

Scotland had lower levels of arts and cultural engagement before COVID than were in line with the UK average, but **levels dropped further** in Scotland since March 2020 than overall (esp. for performing arts).

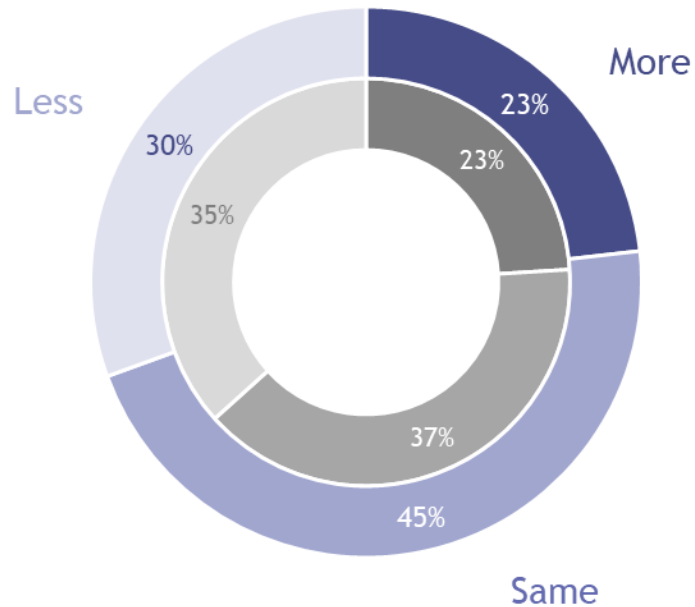
As of the beginning of November, COVID appears to have had **less impact in Scotland in terms of time and money** available to people. More people faced local lockdowns, but fewer were shielding.

Fewer Scots are ready to start attending in person than the UK average.

Experiences During COVID-19

Impact of COVID on Time and Money

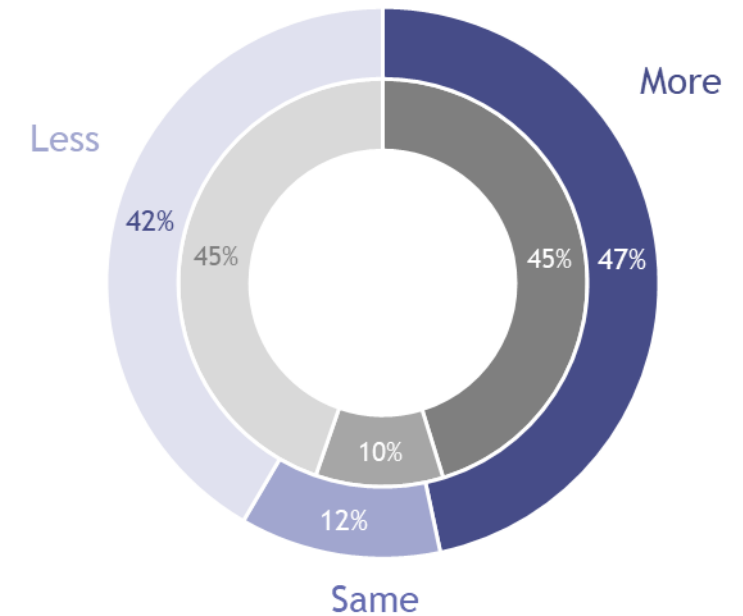
Change in Money Scotland vs Overall



Fewer Scots saw financial drops than across the UK as a whole: there were a similar proportion more who had ‘about the same’ amount of money as before COVID.

A slightly higher proportion of Scots had more or the same amount of time.

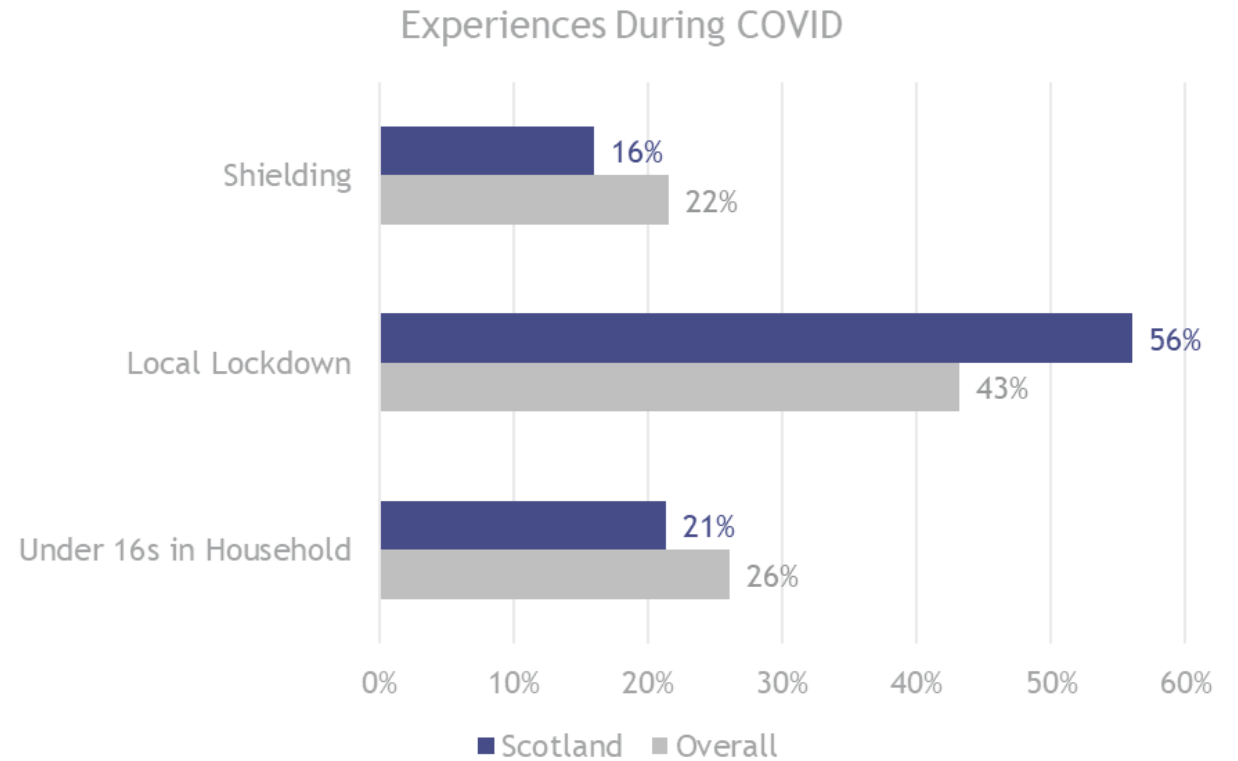
Change in Time Scotland vs Overall



Other Impacts of COVID

Scots were more likely to have faced a local lockdown, but less likely to be shielding.

A lower percentage lived in households with children.



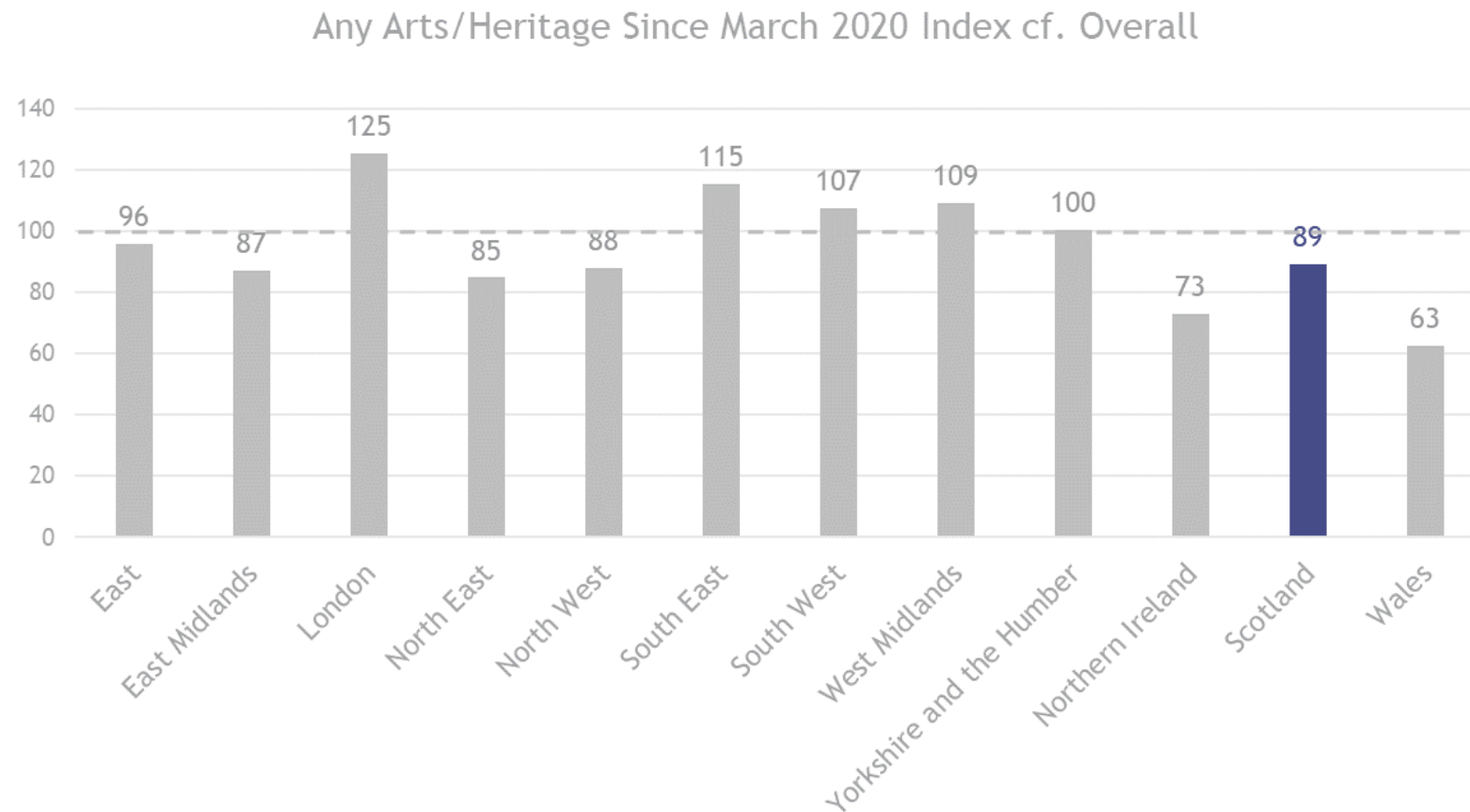
In Person Engagement

Attended Since March 2020

30% of Scots had attended any arts/heritage since Mar 2020, below the overall UK average of 34%: **89** cf. to an index of 100.

It was notably higher than Northern Ireland and Wales, (indices of 73% and 63%).

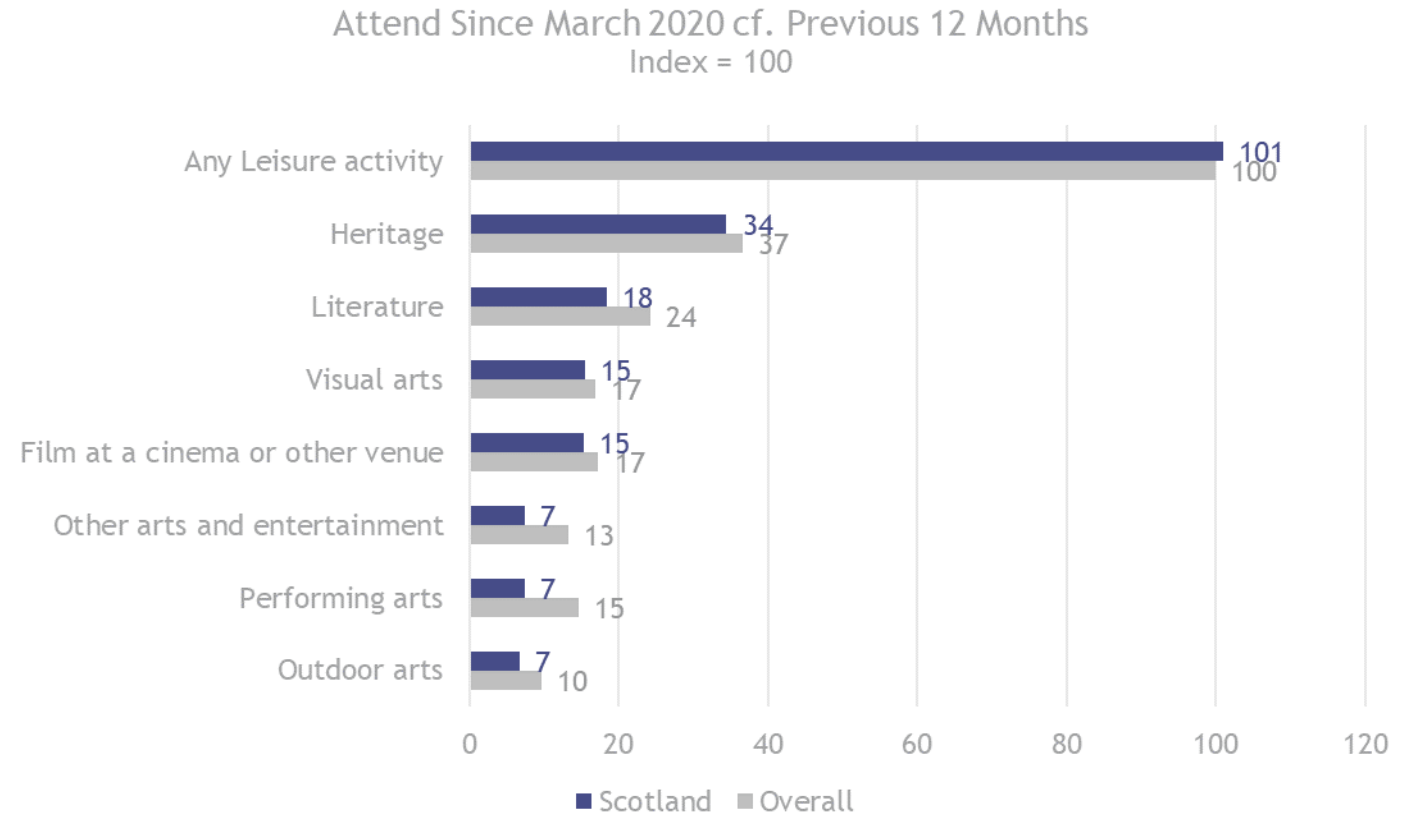
In the 12 months before, it was 85%, in line with the UK average.



Attended Since March 2020

Attendance by Scots dropped further than overall, compared to pre-March 2020 level, especially for performing arts.

(NB: this is comparing 9 and 12 month periods)

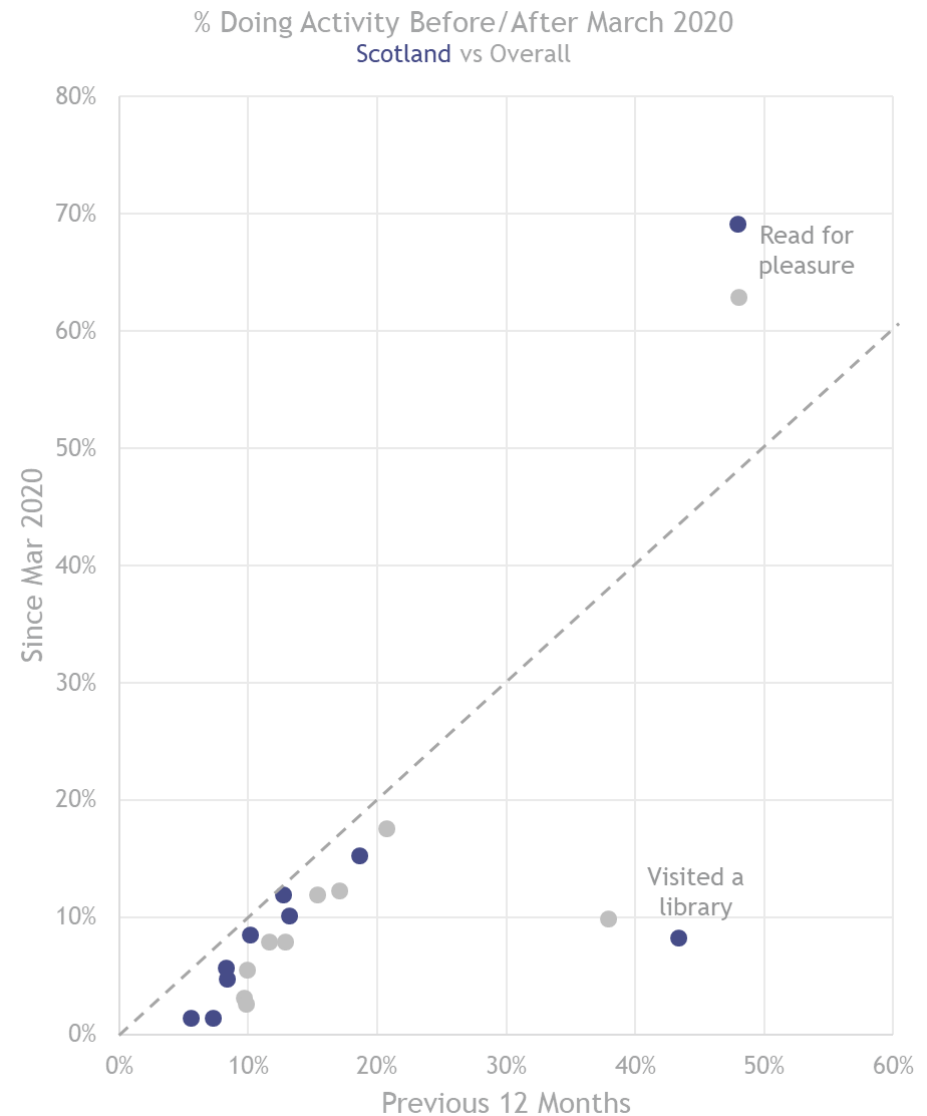


Creative Activities

Comparing creative activities before and after March 2020, four things stand out:

- Almost all activities were done by fewer people*
- Scots read for pleasure at average levels before, but increased (even) more
- More Scots visited libraries before March, but that proportion decreased more than elsewhere after March
- Overall, the activity levels of Scots have reduced less than those for the UK overall.

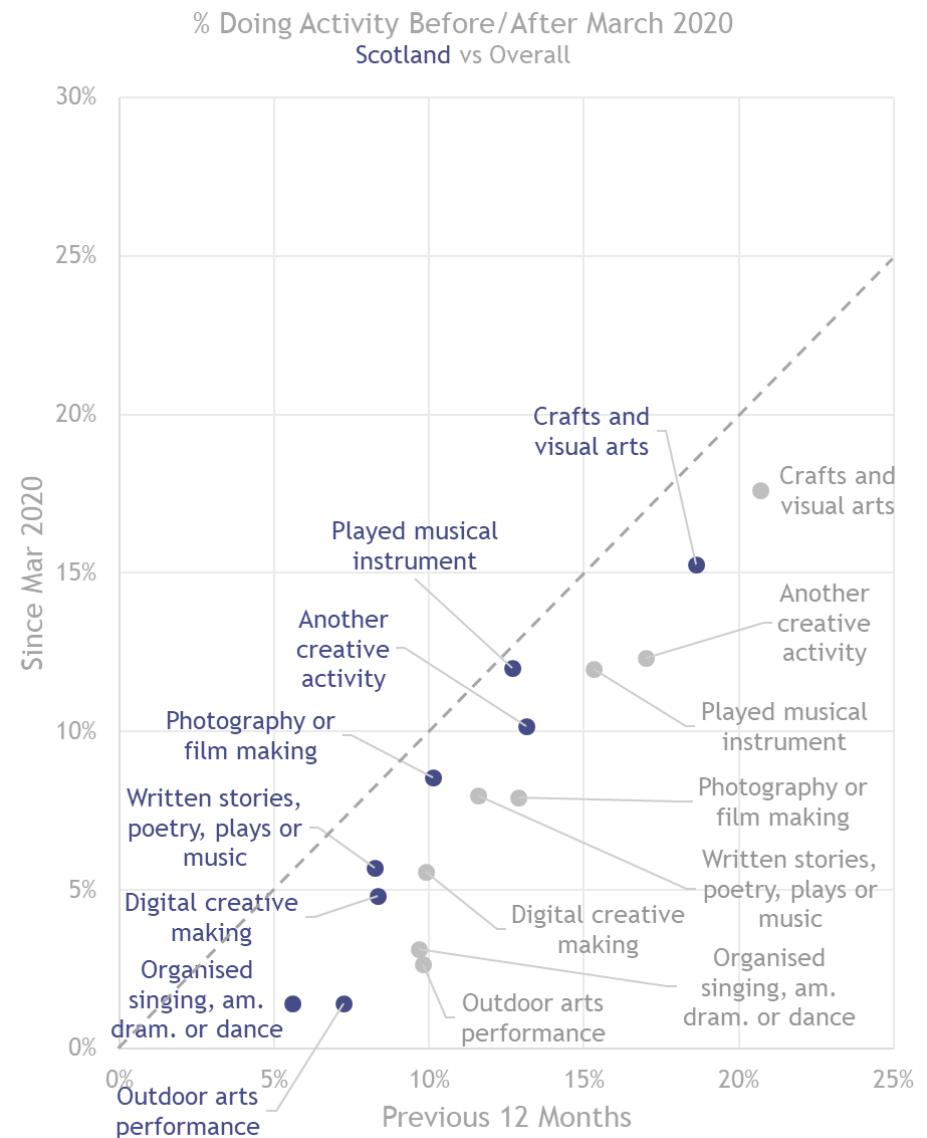
* So were below the dotted line (where levels would be the same)



Creative Activities

For other activities:

- Most were done (slightly) less in Scotland before March 2020
- But most had fallen less in Scotland than elsewhere since March 2020
- The overall ranking of activities is very similar between Scotland the whole of the UK (although more elsewhere do ‘another creative activity’)



Online Engagement

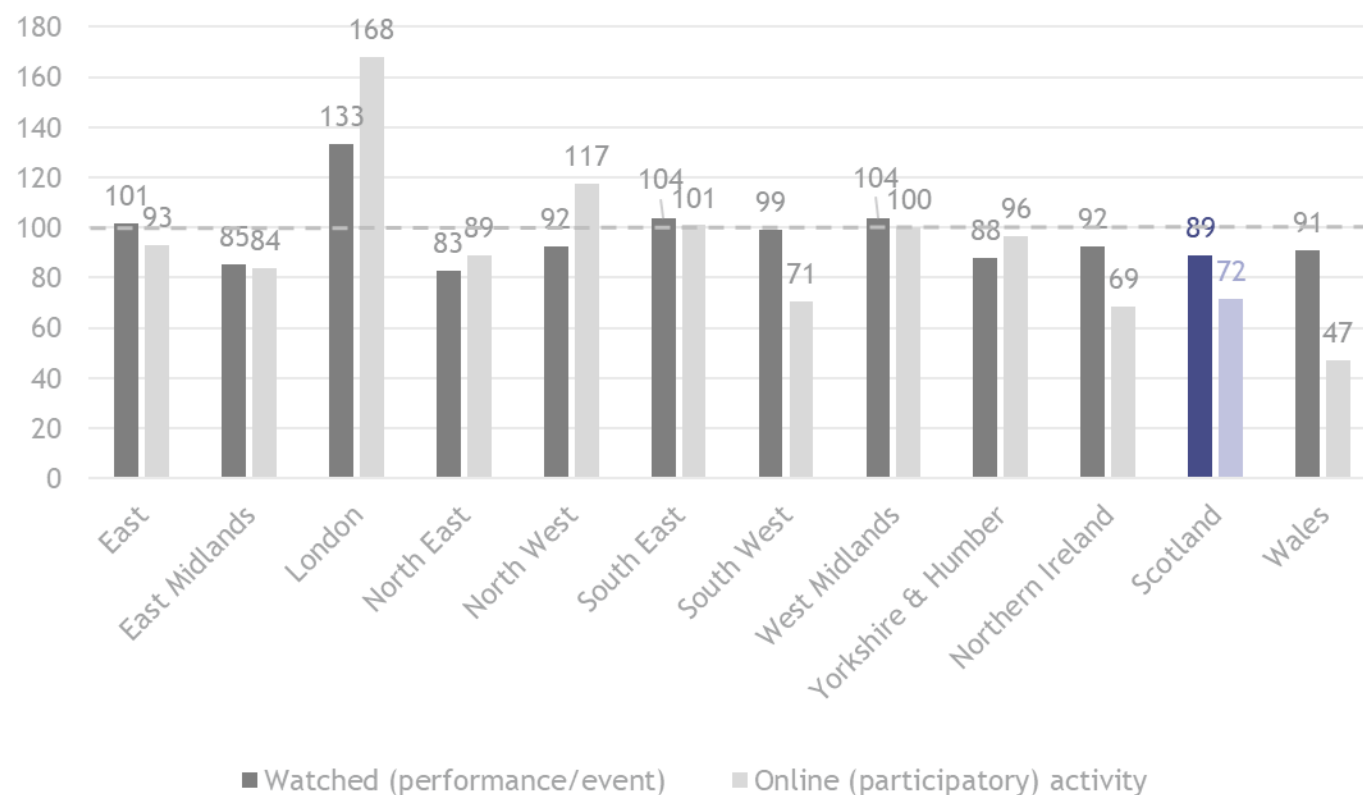
Online Engagement Since March 2020

29% of Scots watched a performance/event online since March 2020; 6% had taken part in an online activity.

This was below the overall UK averages of 33% and 9%: **89** and **72** cf. an index of 100.

In the previous 12 months 41% (cf. 45% for the UK overall) had watched anything (an index of 92), so most of the lockdown difference reflects existing digital engagement levels.

Online Engagement Since March 2020 cf. Overall



Payment for Online Content

The proportion of Scots who had paid for digital content by the following means were:

11% – Bought a ticket/fixed price

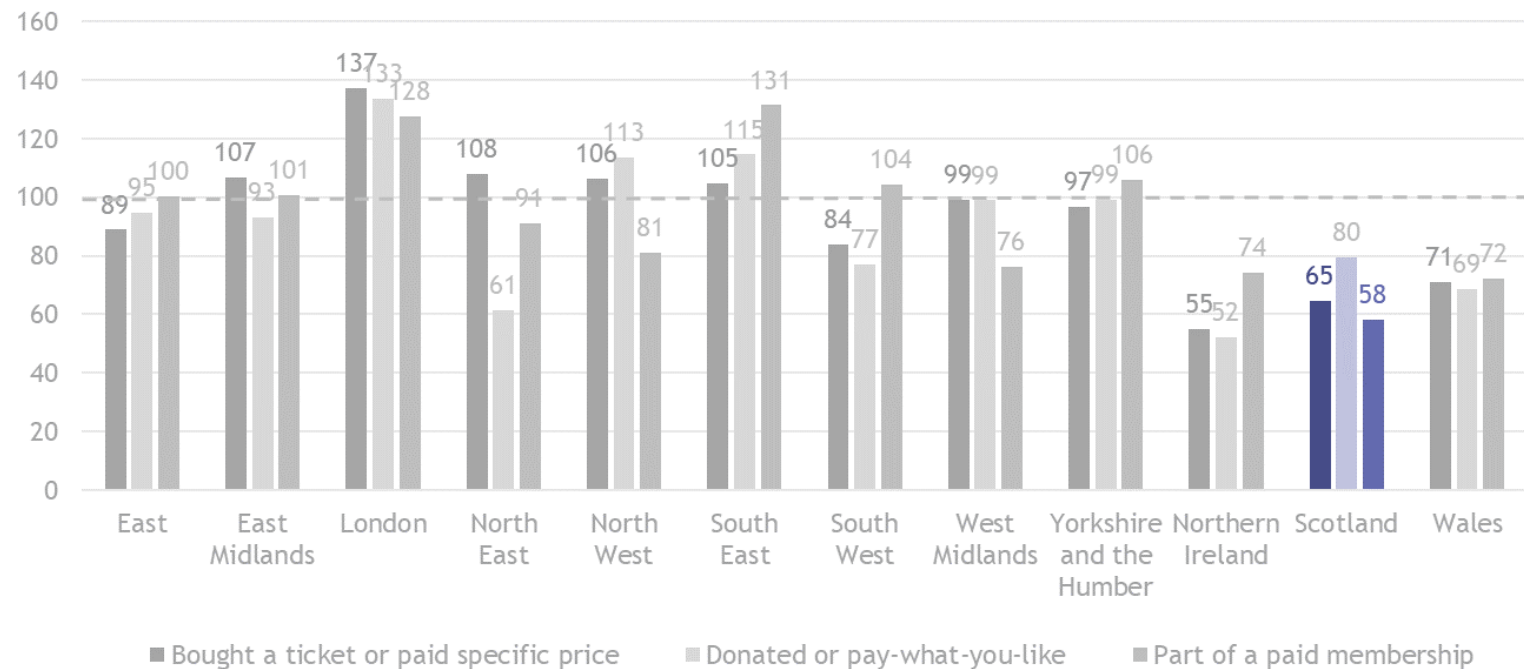
16% – Donated/ pay what you like

6% – Part of paid membership

These was below the overall UK averages of 17%, 19%, 11%:

65, 80 and 58 cf. to an index of 100.

Payment Types for Online Content cf. UK Overall



Future Engagement

Booked or Interested Overall

The % who are currently ‘in play’ (i.e. who have booked, or are interested in booking) for ANY art and heritage activity of those listed (see next page) is c. 4% lower in Scotland than the overall average.

Booked/interested for ANY art / heritage activity:

59%

Cf. 63% for UK Overall

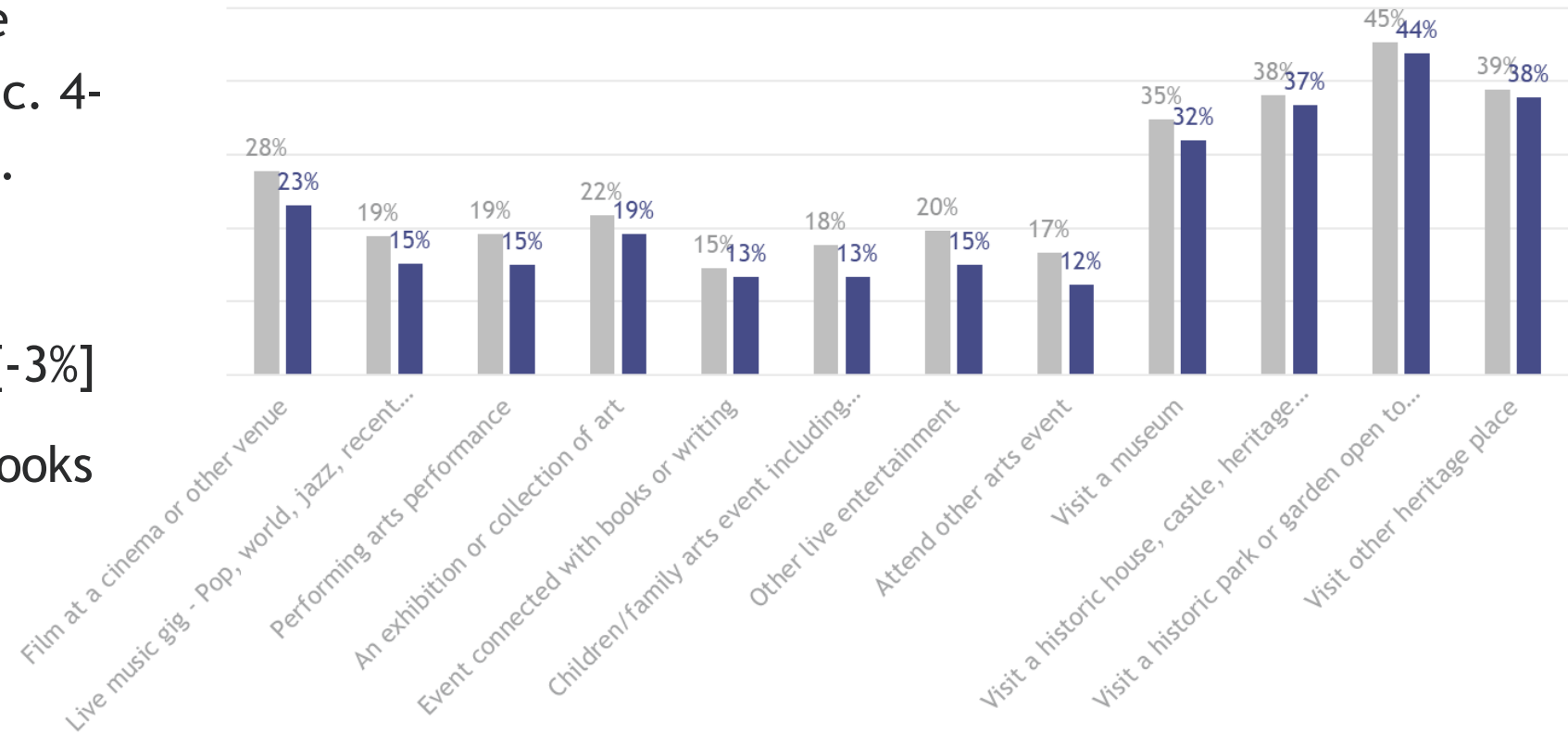
Booked or Interested by Art Form

The % 'in play' for each artform (i.e. who have booked, or are interested in booking) is also c. 4-5% below the overall average.

Exceptions are:

- museums and visual arts [-3%]
- 'events connected with books or writing' [-2%]
- heritage/historic sites/gardens [-1%]

Booked or Interested, by Art Form
Scotland cf. Overall



For more information...

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