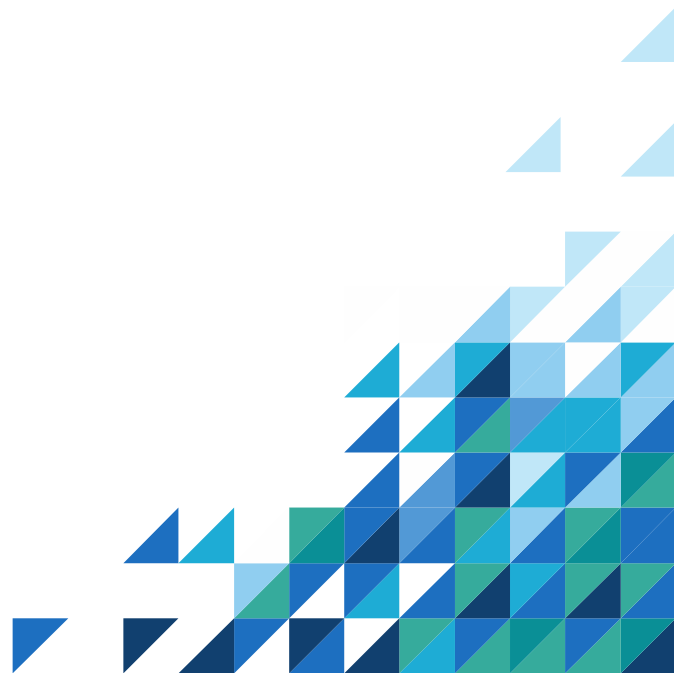




PUBLIC ATTITUDES SURVEY

A summary report of research into the attitudes of the public to the reopening of museums in Cornwall

29th June 2020



Use of Data

Market Research supporting PR activities

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The contents of this report represent our interpretation and analysis of information that can be considered generally available to the public and provided voluntarily by respondents. It is not guaranteed as to accuracy or completeness. It does not contain material provided to us in confidence by our clients or research respondents.

1 Introduction

Cornwall is home to more accredited museums than any other region. Culture and heritage matter to people in Cornwall; they are at the heart of its distinctive identity and sense of place.

Cornwall Museums Partnership is an independent charitable incorporated organisation, formed in 2015 to provide leadership for Cornwall's museums; to support them, represent them and give them a voice. It is a sector-leading charity which is not afraid to think differently and respond to the surrounding museum-scape, rather than wait for wisdom from "up the line." The partnership has helped to transform the museums sector in Cornwall, nurturing a remarkable collaborative ethos which means museums are working with a wider range of people and partners than ever before.

Due to the Covid-19 pandemic, all museums in Cornwall, and indeed nationwide, have been closed to the public since 21st March 2020. The current government position, as published in the 'roadmap' is that museums may re-open to the public from the 4th July onwards¹. Museums across Cornwall are currently assessing the viability of reopening. This is not purely an economic matter; they have a responsibility to their communities and want to understand more about public opinion. To inform their planning they wish to understand better what public attitudes in Cornwall are. Whilst they have received and read national research shared by ALVA and AIM amongst others, they are keen to understand the local position and how their communities feel about museums opening and how likely it is that people will visit if they do.

Cornwall Museums Partnership commissioned PFA Research to undertake the Public Attitudes Survey amongst residents of Cornwall. The survey was designed to be a short and focused piece of independent research which could quickly capture the current 'mood' of the public in Cornwall and their views about the possible re-opening of museums. Specifically, the research aimed to help understanding of the following:

- What people miss about not being able to visit museums;
- What people go to museums for;
- How people would feel if museums in Cornwall were to re-open;
- How likely they would be to visit;
- What factors would encourage them to visit;
- What factors would put them off visiting.

The survey was delivered through an online methodology using independent consumer research panels, PFA Research's in-house opinion panel (www.whatcornwallthinks.com) and supplemented by promotion through Cornwall Museum Partnership and partners' social media channels. The survey was in field for one week from 16th to 23rd June inclusive.

¹ <https://www.museumsassociation.org/museums-journal/news/english-museums-to-stay-closed-until-at-least-july>

2 Survey Results

2.1 Response Rate

The survey collected a total sample of 543 valid responses, collected from the What Cornwall Thinks opinion panel (n=146), independent survey access panels (n=367) and promotion through social media (n=30).

The size of sample collected allows the survey to be quoted with a confidence interval of $\pm 4.2\%$ at the 95% level of confidence².

2.2 Profile of Respondents

The survey aimed to achieve responses from a wide cross-section of the Cornish community. The response profile can be summarised as follows:

- By age group: 11% were under 25 years; 27% were aged 25 to 44; 40% were aged 45 to 64; and 22% aged 65 or older.
- By gender identity: 56% are female; 43% male; 1% non-binary; and 1% self-described in another way.
- Nearly 60% of respondents are in full-time or part-time work or self-employed occupations. 20% are retired. The remaining 20% are not in work (not looking, unemployed), in full-time education or volunteering.
- 38% of respondents are from households with a total annual income of less than £26,000, 31% have incomes of between £26,000 and less than £48,000 and 17% have incomes of £48,000 or more. 14% preferred not to say or didn't know.
- 25% of respondents represent a household with children under 16 years of age.

2.3 Key Findings

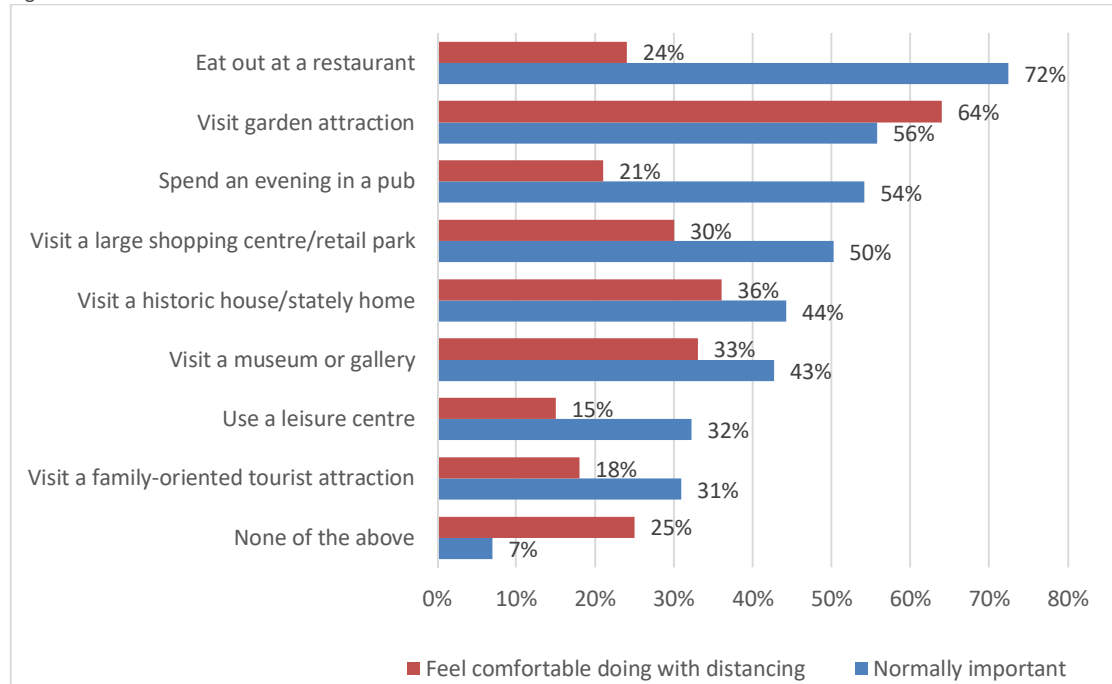
To contextualise further findings, survey respondents were asked to select from a list of leisure activities and venues the ones that they would feel comfortable doing right now (assuming social distancing rules remain in place) and which of the activities would normally be important for them to be able to do (irrespective of how often they actually do them). Figure 2.1 shows that many 'normal' activities are currently out of all consideration for many, such as eating out at a restaurant, going to the pub for an evening and visiting large shopping centres. However, some activities are deemed to be accessible for many of those who are normally accustomed to them, such as visiting a garden attraction, visiting an historic house or stately home, and visiting a museum or gallery.

Respondents were asked when they last visited a museum or gallery. Just 3% said they have never visited a museum or gallery and over 80% have visited one within the last year. Those in the 45 to 64 age group and those in the £48k+ household income group are most likely to have visited within the last year.

² The confidence interval or margin of error can be understood using the following example: If 50% of all the people in the population would want to visit a museum within the next 12 months, and if we were to repeat the survey of 543 people ("In the next 12 months, will you be visiting a museum?") many times, then 95% of the time, our survey would find that between 46% and 54% (i.e. $\pm 4\%$) would answer the same way.

Those who have visited a museum within the last year are more likely to be prepared to visit one now (44% vs 33% average).

Figure 2.1 – Leisure Activities



Base: All respondents; n=543

Do museums matter to people?

Four in five respondents (79%) expressed concern that places such as museums and galleries may not survive the coronavirus lockdown. Those most concerned were those who have visited museums the most recently.

Asked to rank a series of five statements about museums (from greatest to least concern) should museums not survive the lockdown, all statements featured strongly in the top one or two ranks – i.e. there was no broad consensus about which potential ‘losses’ were more important than others. However, apparently of least concern (ranked in the top two positions by ‘only’ 23% overall) was ‘loss of expert knowledge’. Potential ‘loss of important artefacts and heritage’ and ‘loss of valuable place to learn about Cornish culture and heritage’ ranked higher for older age groups (45+) than younger (under 25s), whilst the younger groups were more concerned about the potential ‘negative impact upon the tourism economy’ and ‘negative impact on local communities’.

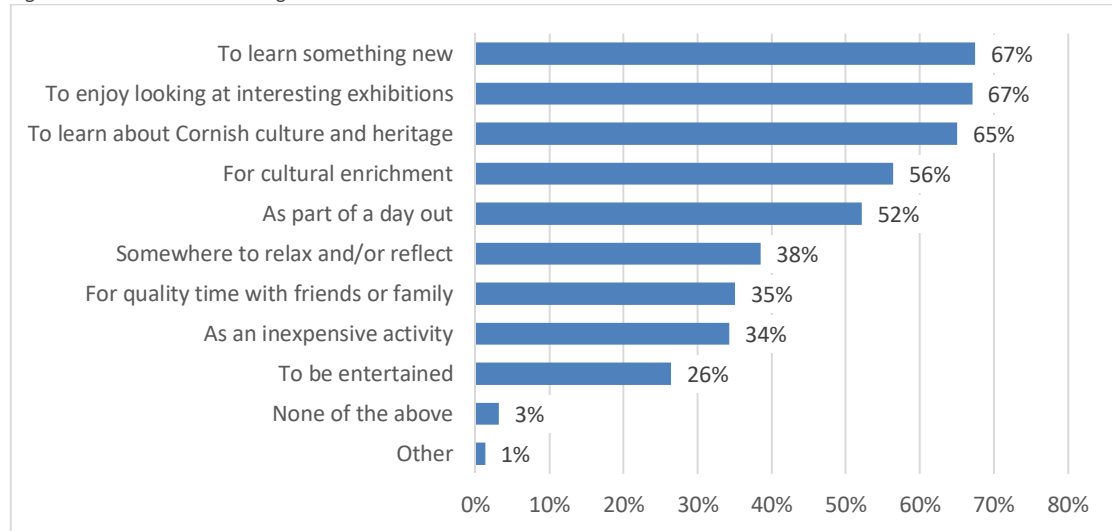
What do people miss about not being able to visit museums?

Respondents were asked to think about the last time they visited a museum and what they feel a visit to a museum could do for them that is missing from their life at the moment. Ahead of all other themes, 40% of respondents expressed that a visit to a museum would provide an opportunity for learning and connecting with knowledge and history; this was amplified among the under 25s (52%). For at least one in eight people each, museums would provide opportunity for cultural enrichment (12%), a break or distraction from routine (13%) and some calmness and/or time for relaxation & reflection (15%).

What do people go to museums for?

Respondents were asked for what reasons they would go to a museum. 97% stated one or more reason (i.e. just 3% stated 'none of the above'). For two thirds (67%) it would be to learn something new and also for two thirds it is to enjoy looking at interesting exhibitions. 56% appreciate the cultural enrichment that museums provide and over half (52%) might plan a trip to the museum as part of a bigger day out.

Figure 2.2 – Reasons for Visiting a Museum



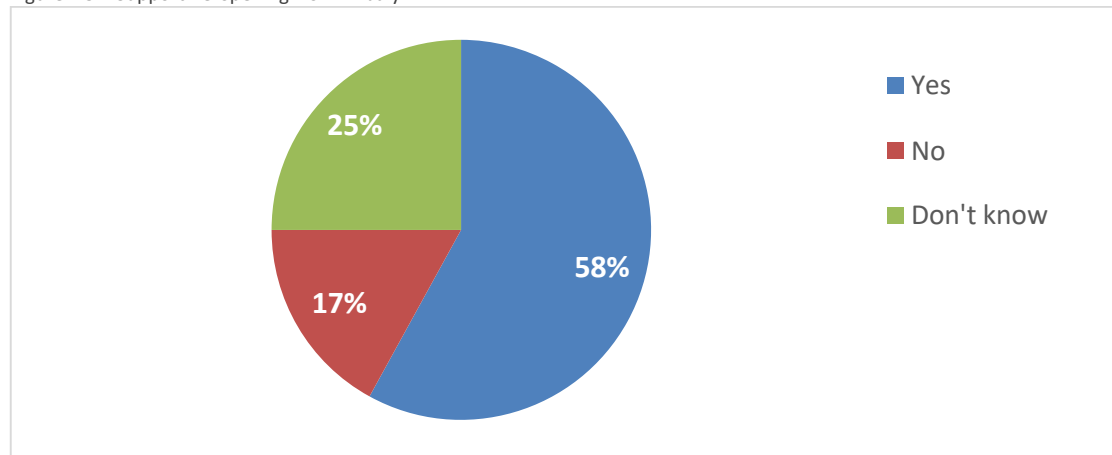
Base: All respondents; n=543

How would people feel if museums in Cornwall were to re-open?

Respondents were informed that: "According to the Government's roadmap for easing the coronavirus lockdown, museums may be able to reopen their doors to visitors from 4th July 2020."

58% of people believe that people should be able to visit museums, galleries and similar cultural attractions from 4th July. A quarter (25%) were unsure and just 17% were clear in stating 'no' (Figure 2.3). Those mostly likely to have responded 'yes' are those who have visited a museum most recently or come from higher income households.

Figure 2.3 – Support Re-opening from 4th July



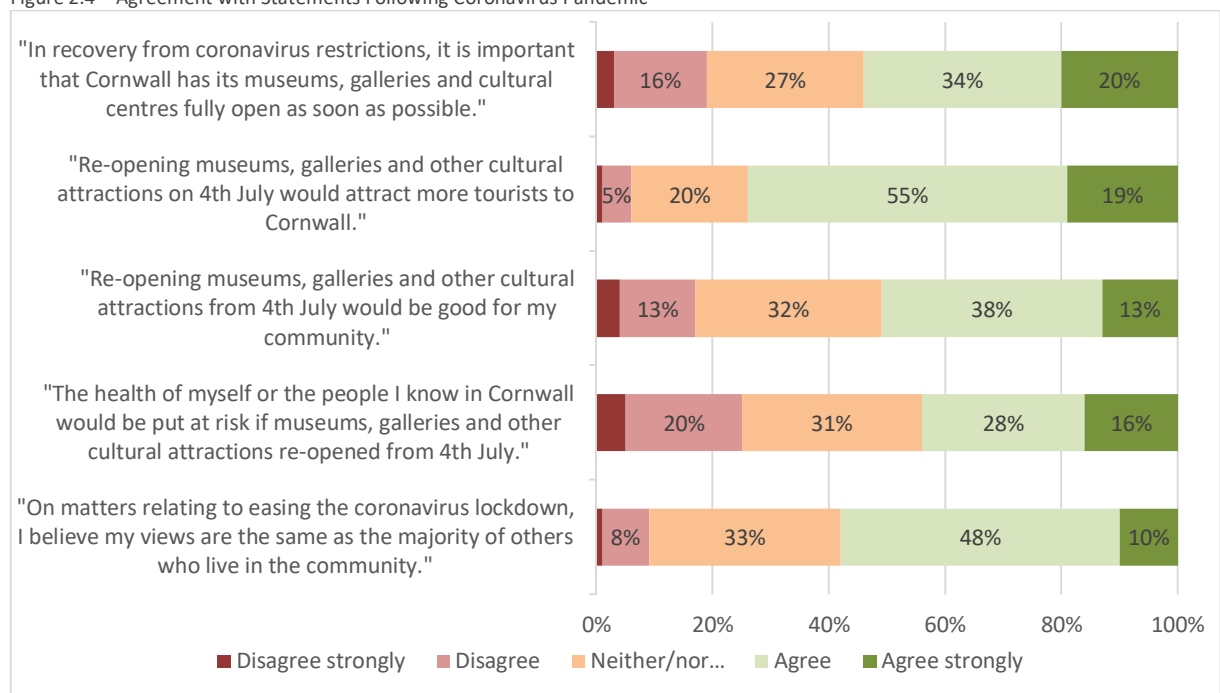
Base: All respondents; n=543

Those who do not believe that people should be able to visit museums, galleries and similar cultural attractions from 4th July, or were unsure, are concerned primarily that re-opening at that time is still too early in the country's recovery from coronavirus (75%) followed by a fear that it would attract too many tourists and out-of-county visitors to Cornwall (64%).

Although a slight majority believe that people should be able to visit from 4th July, the vast majority (93%) of this group still believe that there should be conditions placed upon museums in order for them to do so. 83% would expect to see a restriction on the number of visitors admitted at any one time (dependent upon its size), three quarters (76%) would expect strict social distancing to be enforced, and over half (56%) would expect visitors to be prevented from touching exhibits and displays (e.g. information boards).

Respondents were then asked to respond on a 5-point scale to a series of attitudinal statements (Figure 2.4).

Figure 2.4 – Agreement with Statements Following Coronavirus Pandemic



Base: All respondents; n=543

The greatest ‘concern’ from the five statements surrounded a visitors, that “Re-opening museums, galleries and other cultural attractions on 4th July would attract more tourists to Cornwall”, which three quarters (74%) of respondents agreed with (i.e. answered ‘agree’ or ‘agree strongly’) versus only 6% disagreeing – a net difference of 69%³.

The statement that people least agreed with on balance (net 19%) was “The health of myself or people I know in Cornwall would be put at risk if museums, galleries and other cultural attractions re-opened from 4th July”, although those in the lowest household income group and those who have not visited a museum within the last 3 years, expressed the greatest ‘concern’ with net agreement scores of 31% and 36% respectively.

How likely would people be to visit?

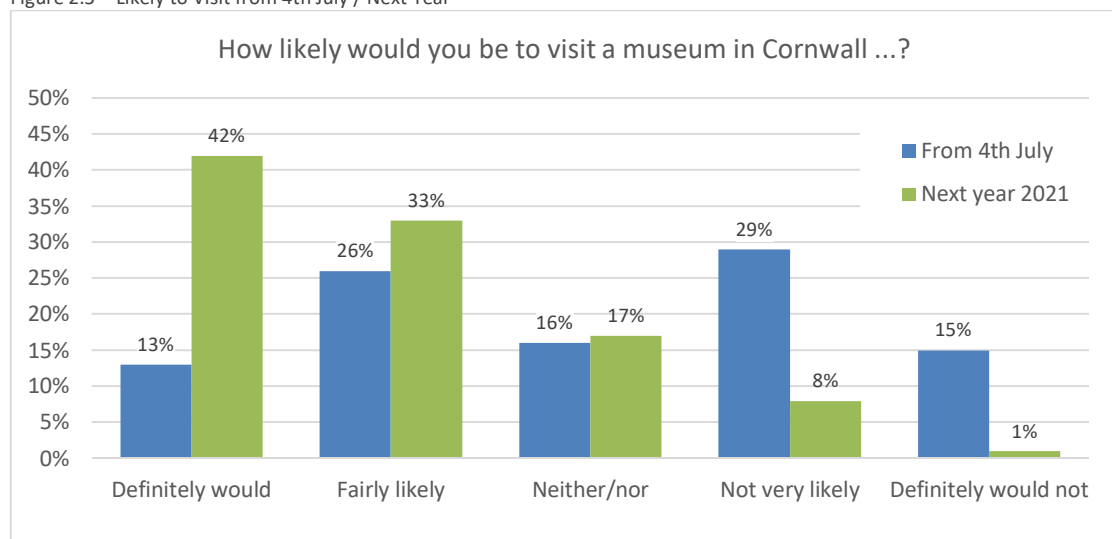
Respondents were asked how likely they would be to visit a museum or gallery in Cornwall this summer if they were allowed to re-open from 4th July. 39% would ‘definitely’ or be ‘fairly likely’ (Figure 2.5).

61% of those who would approve of museums being able to open from 4th July would definitely or be fairly likely to visit this summer. Conversely, 74% of those who would not approve (or don’t know) would definitely not or not be likely to visit (8% would).

Looking ahead to 2021 and on the assumption that all lockdown restrictions have been lifted by then, a full three quarters of respondents said they would definitely or be very likely to visit a museum in Cornwall next year. This rises to 82% for those in the 25 to 44 age group, to 81% for those with household incomes over £26k and to 92% for those who have most recently visited a museum within the last year.

64% of those who currently would not approve of museums opening from 4th July say they would be likely to visit next year, compared to just 8% who would be likely to visit this year.

Figure 2.5 – Likely to Visit from 4th July / Next Year



Base: All respondents; n=543

³ ‘Net agreement’ = those agreeing (top two bins) minus those disagreeing (bottom two bins)

What factors would put people off visiting?

People would be put off visiting museums once they re-open if they are uninformed or feel concerned about (inadequate) safety measures in place at the venue. Of those who said ‘fairly likely’ or ‘definitely would’ to visiting this summer, only 12% said they would be quite happy to visit without giving it any further thought. Even if likely to visit, over half (54%) would still take a decision based upon what kind of securities the museum has put in place, such as enforced social distancing. Nearly half (47%) would consider the latest news (Government information) about the pandemic.

Those who said not ‘very likely’ or ‘definitely would not’ visit this summer were asked whether there may be conditions upon which they actually would consider it. A full quarter said they would not consider it at all. Others would mostly consult the latest news about the pandemic (41%) and a third (34%) would look to see what measures the museum has put in place. 29% would consider going only to outdoor venues.

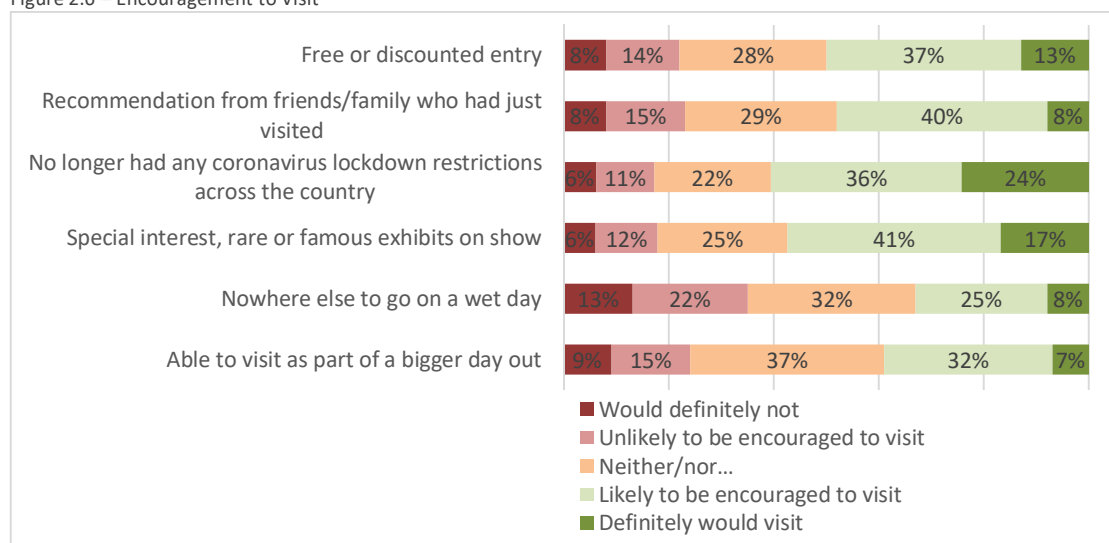
Of those who said they would be unlikely to visit next year - even when the lockdown will most likely have been fully lifted – the majority have no particular reason for this, they are simply not interested.

What factors would encourage people to visit?

Respondents were asked what might give them confidence in visiting museums again after 4th July. The measure stated most often that people would want to see is restricted numbers of visitors in the museum at any one time (61%), followed by the ability to be able to pre-book entrance tickets (42%) and prior (published) information on procedures such as social distancing (37%).

Respondents were invited to state on a 5-point scale the extent that particular enticements would be encouraging for them to visit museums in Cornwall after 4th July. Whilst practical considerations would be encouraging for some respondents (e.g. free or discounted entry, or nowhere else to go on a wet day), the most important ‘encouragement’ would be that there were no longer any coronavirus restrictions across the country - 60% say they would likely be encouraged or would definitely visit if this was the case.

Figure 2.6 – Encouragement to Visit



Base: All valid respondents (excludes ‘not interested’); n=514