COVID-19 has had a significant impact on everyone, including those in the arts and culture sector. In order to support the arts in Malaysia whom are negatively impacted by COVID-19, CENDANA, a unit of MyCreative Ventures Sdn. Bhd. launched an online survey designed to track sentiment in Malaysian audiences and their willingness to return to arts and cultural events. The survey results will assist CENDANA and other public and private partners to support the sector as part of its Post COVID-19 recovery plans. The survey started on May 13, 2020 and concluded on June 11, 2020.

The survey was extended to existing audience database of selected arts and culture/live events organisations, done in collaboration with: PR Worldwide, Kuala Lumpur Performing Arts Centre, Performing Arts Centre of Penang, Ilham Gallery, Sabah Art Gallery and more. Culture Venture assisted CENDANA on the survey design.

This report was prepared on June 12, 2020.

Audience Propensity to Return to Arts Activities and Venues Report

Participants background

692 participants (64% female, 36% male)

80% are between the age of 16-44 years old

Type of activities that participants had attended at least once prior to the Movement Control Order

68% indoor cinema  56% indoor concert  53% exhibition in a gallery
Type of activities participants have viewed once in the past 4 weeks, online or on TV

38% concert  22% theatre performance  13% dance performance

Overall experience viewing arts and culture activities online or on TV

Likelihood of opting for digital arts and culture events over live arts and culture events

- 7% extremely likely
- 37% likely
- 46% unlikely
- 10% extremely unlikely
Whether digital arts and culture events and activities provide more of the below qualities than attending live events in person

58% disagree-strongly disagree that digital activities provide **excitement**

59% disagree-strongly disagree that digital activities provide **engagement**

62% agree-strongly agree that digital activities provide **comfort**

39% neither agree nor disagree that digital activities provide **value for money**

78% agree-strongly agree that digital activities provide **safety**
Since the introduction of the Conditional Movement Control Order, what activities have participants done?

- None of the below: 34%
- Returned to work: 29%
- Went to a restaurant, practising social distancing: 26%
- Practised a sports activity, practising social distancing: 8%
- Used public transport: 3%

How safe do participants feel to leave the house:

- Not safe (91%)
- No responses (9%)
### How much do participants agree or disagree with these statements

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree Strongly Agree</th>
<th>Agree Weakly Agree</th>
<th>Disagree Weakly Disagree</th>
<th>Disagree Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The arts are essential to my life</td>
<td>45</td>
<td>42</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>The arts helped their wellbeing</td>
<td>32</td>
<td>45</td>
<td>18</td>
<td>4</td>
</tr>
<tr>
<td>They have suffered financial losses due to COVID-19</td>
<td>22</td>
<td>25</td>
<td>26</td>
<td>21</td>
</tr>
<tr>
<td>They miss going to a theatre, gallery or concert hall</td>
<td>55</td>
<td>33</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Their financial situation will allow them to spend money on future arts events</td>
<td>15</td>
<td>36</td>
<td>32</td>
<td>14</td>
</tr>
<tr>
<td>They look forward to return to a theatre, gallery or concert hall</td>
<td>50</td>
<td>36</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Their attendance to arts events in the future will return to normal, pre-pandemic</td>
<td>17</td>
<td>28</td>
<td>29</td>
<td>21</td>
</tr>
<tr>
<td>Their overall experience of arts events in the future will be similar to that before the pandemic</td>
<td>11</td>
<td>26</td>
<td>32</td>
<td>26</td>
</tr>
</tbody>
</table>

### When will participants resume visiting any of these arts venues after the Movement Control Order

<table>
<thead>
<tr>
<th>Venue</th>
<th>Likely to Resume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open air venue</td>
<td>24%</td>
</tr>
<tr>
<td>Arts centre</td>
<td>23%</td>
</tr>
<tr>
<td>Art galleries</td>
<td>21%</td>
</tr>
<tr>
<td>Cinemas</td>
<td>22%</td>
</tr>
<tr>
<td>Theatre</td>
<td>22%</td>
</tr>
<tr>
<td>Concert hall</td>
<td>24%</td>
</tr>
</tbody>
</table>
Do specific measures need to be taken by the event organiser to make participants feel safe and comfortable to go to an indoor arts venue again?

<table>
<thead>
<tr>
<th>YES</th>
<th>96%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO</td>
<td>4%</td>
</tr>
</tbody>
</table>

What would make you feel safe and comfortable again going to an indoor arts venue (below ranked in order of importance):

- Reduction or zero COVID-19 cases
- Availability of COVID-19 vaccine
- Sanitising venue before and after the event
- Government lifting all restrictions
- Avoiding queues of people inside the venue
- Entering the event through socially distanced entry
- Taking temperatures at the venue
- Ability to be outside or outdoors
- Enforced use of protective masks inside the venue
- Availability of hand sanitiser
- Reduced audience or visit numbers
- Reconfigured seating to respect physical distancing between audience members
- Seeing others visit
- Gathering data for potential contact tracing
Do specific measures need to be taken by the event organiser to make participants feel safe and comfortable to go to an outdoor arts event again?

What would make you feel safe and comfortable again going to an outdoor arts event (below ranked in order of importance):

- Reduction or zero COVID-19 cases
- Availability of COVID-19 vaccine
- Government lifting all restrictions
- Entering the event through socially distanced entry
- Sanitising site before and after the event
- Avoiding queues of people
- Taking temperatures on site
- Limit on crowds
- Enforced use of protective masks
- Availability of hand sanitiser
- Designing spaces to respect physical distancing between audience members
- Seeing others visit
- Gathering data for potential contact tracing

YES: 94%  
NO: 6%

DISCLAIMER: Without prejudice to the generality of the foregoing paragraphs, all data and information presented in this report have been obtained or derived from sources believed by CENDANA to be reliable however CENDANA makes no representation as to their accuracy, completeness and timeliness. CENDANA does not represent, warrant, undertake or guarantee that the use of data and information in this report will lead to any particular outcomes or results. The contents of this report are not to be construed as legal, business, investment or tax advice. Parties should consult with its own advisors. CENDANA shall not be liable for any loss suffered by any party arising from the use of data and information presented in this report.