SCOTINFORM CULTURAL PANEL

Scotinform Cultural Panel: Level Zero and Beyond

Introduction

The loosening of restrictions on travel and social gatherings earlier in the summer has led to cautious optimism for the cultural sector, which has been hit hard by the pandemic. But to what extent are audiences in Scotland ready to emerge into Level Zero?

To find out, we asked the Scotinform Cultural Panel for their views. This is a panel of residents of Scotland who prior to the pandemic were enthusiastic cultural audience members. We recruited them off the back of our **Scotinform Cultural Survey** and have added to it periodically since. The Panel has been a fantastic asset for Scotinform and our clients as more traditional audience recruitment and research practices have been impossible, and has allowed us to understand the context in Scotland in more detail.

First, a health warning. This is not a representative sample of the Scottish population – by definition it is a 'warm' audience that was previously highly engaged in cultural activity. As such, we might expect it to be the most keen to re-engage as venues reopen. Also, as we have found throughout the past year, customer sentiment is highly volatile and very susceptible to changes in the pandemic's progress and developments such as new variants, vaccines and restrictions. Please bear this in mind as you read and digest.

The survey was distributed on July 20th, just as Scotland was moving towards Level Zero, and was kept open until August 24th, when Nicola Sturgeon's briefing noted caution about an increase in cases. This was a relatively optimistic and positive period, meaning that the confidence displayed in these figures might reasonably be regarded as being at something of a high.

Unless otherwise stated, the figures quoted in this article are based on the 262 Cultural Panel members who responded to the survey. Thanks to each and every one of them for their contributions over the past year.

Cultural Engagement Before and During Lockdown

As previously discussed, this is an engaged audience. In the year before the first lockdown in March 2020, **97%** of respondents had been to a museum, **90%** to a gallery, **76%** to a theatre, **73%** to a garden, **73%** to a music concert or event, **68%** to a visitor attraction and **27%** to a zoo or wildlife attraction. Every respondent had done at least one of these things.

As restrictions started to ease from around May 2020, audiences have been able to return to some of these events and activities, albeit often in a modified visitor format and to a variable extent depending on restrictions. However, **18%** of this previously engaged sample have not gone to anything in the past year. The propensity to visit is down too: respondents were most likely to have been to a garden (**57%** have visited in the past year), reflecting the extent to which gardens were able to remain open and provide a visitor experience that was perceived as safe. **47%** had been to a museum, **44%** to a gallery, **22%** to a visitor attraction and **12%** to a zoo or wildlife attraction. The live entertainment sector was particularly hit, with only **7%** each having been to a live music concert or a theatre.

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Of course, these figures are likely to reflect both supply (the extent to which operators were permitted to open) as well as demand (the extent to which audiences wanted to return).

The good news for operators is that they succeeded in making visitors feel comfortable as far as Covid-19 was concerned. **96%** of respondents who had made a visit said that they felt sufficiently informed ahead of their visit about how it would be organised and managed to take into account social distancing and hygiene rules, and the same proportion said that they felt comfortable during their visit. This is testament to the vast amount of work that operators have undertaken in devising new ways of working to reflect the requirements of the pandemic.

However, there were some implications in terms of the quality of the experience. Of respondents who had undertaken a cultural visit since the first lockdown, **57%** said that their experience was not as good as before. Whilst respondents were grateful for the opportunity to return to their favourite cultural spaces, there is no doubt that in many cases the restrictions, closure of certain elements of the visitor experience, and added concerns about the spread of infections impacted negatively on visitor enjoyment. For many operators, who of course can do nothing about the restrictions, this may have had implications for recommendation, propensity to return and secondary spend.

Respondents who had not visited any cultural places since they began to reopen were asked why they had not returned. The most selected reasons again reflect a combination of supply and demand. **59%** of respondents said that they didn't feel comfortable going back into public spaces just yet, and **35%** said that they were not interested. **34%** said that the things they would like to see, visit or do were not yet open, and **30%** that they had not been able to visit due to restrictions on travel (travel to and from certain local authority areas was restricted at various points from March 2020).

Digital Engagement

As would be expected, the level of digital engagement across all of the activities mentioned has increased significantly from March 2020. For example, before this date, just **15%** of respondents had attended an online talk or event run by a cultural organisation. Since the first lockdown this figure has risen to **68%**. Theatre and live performance already had some extent of digital coverage before lockdown; **22%** had seen a filmed play or concert before lockdown, but this increased to **45%** during lockdown, with the same proportion watching a live stream of a play or concert.

There is no doubt that digital engagement has filled the void left by the closure of cultural organisations, and in some cases has expanded audience horizons; **71%** of digital audiences agreed that 'being able to do things online made lockdown more bearable' and **49%** agreed 'I have seen things online that I would never have been able to see in real life.' And generally this audience feels comfortable in a digital environment; **83%** agree that they are confident booking and attending things online. Again, it should be remembered that this is a digital panel and therefore likely to respond positively to this type of provision.

However, the extent to which digital culture is as good as a real life experience is open to further discussion. **75%** of digital audiences agreed that 'there is no replacement for real life experiences' and **79%** agreed that 'when I do things online I miss the social experience of going to them in person.'

These sentiments perhaps impact the propensity of cultural audiences to engage digitally in the future – and, crucially, the propensity to pay for it. **53%** of digital audiences say that they are willing to pay for these kinds of online experiences and **49%** that they will continue to do things online in the future.

Future Plans

We were interested to understand a bit more about the confidence of cultural audiences in returning to public spaces. As would be expected, there was a range of responses to this question, with a significant level of caution still evident. **7%** said that they do not feel comfortable returning to cultural spaces at all yet, and **24%** that they are comfortable returning to outdoor spaces only. At the other end of the scale, **11%** say that they have no concerns about returning to indoor or outdoor spaces. The majority, **58%**, say that they are comfortable returning to indoor and outdoor spaces as long as it is clear that regulations continue to be observed.

This level of caution is consistent with Scotinform's other research projects and serves as a reminder that reopening and relaxing of restrictions will not necessarily result in a return to pre-pandemic demand.

Having said that, only **3%** of the audience anticipate that they will not return to any cultural activity over the next six months, assuming no changes to the planned restrictions. Gardens, museums and galleries are the most likely to be visited, with nearly three quarters of respondents saying that they would plan to visit. Just under half of respondents anticipate visiting a theatre or music concert in the next six months. What is encouraging is that this demand is evidenced by definite plans, such as tickets already booked or arrangements to visit on a specific date. **42%** have booked or actively planned to go to a music concert or event, **35%** to a museum, **31%** to a gallery, **29%** to a garden and **29%** to a theatre.

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Wider Economic Impact

Of course, the impact of the closure of cultural organisations extends beyond the ticket office – the local economy is often reliant on expenditure on transport and food and drink by cultural audiences. Scotinform was interested to see whether this post-pandemic behaviour might be different; will audiences be as likely to have a drink in the pub next to the theatre, or to take the train to see an exhibition?

The results would suggest that a reopening of venues might not result in a proportional upswing in wider spending:

35% of respondents said that they used to take public transport to get to cultural activities or events, but would be less likely to do so now. **38%** said that they used to go for a drink in a pub or bar before or after the event or activity, but would be less likely to do so now, and **29%** said that they used to go for a meal in a café or restaurant before or after the event or activity but would be less likely to do so now.

There also appears to be a potential impact on party size. **23%** of respondents said that they used to go to cultural activities or events with people from outside their own household, but that they would be less likely to do so now.

This trend – to go to fewer places in smaller groups in order to minimise social contact – might result in an opportunity for cultural organisations with their own bars and cafes, since audiences may be more inclined to stay in the venue rather than taking the 'risk' of going elsewhere.

Conclusions

- **Whilst they are keen to return, audiences can be expected to show an ongoing level of caution regarding visiting cultural spaces, at least in the short term. This might impact on propensity to visit, party size and wider economic spend.**

- **Operators should be reassured that to date they have made visitors feel safe and comfortable and communicated the Covid restrictions well. However, most respondents preferred the pre-pandemic visitor experience.**

- **Digital engagement increased significantly during the lockdown period and there is some potential to sustain perhaps half of this increased demand, and to generate revenue through it, in the future.**

- **Changed behaviour patterns might present an opportunity for cultural operators with catering facilities on site.**

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