Scotinform Cultural Panel: Where Are We Now?

Introduction

The memories of lockdown may be receding for most of us, but the period since has been one of unparalleled change. Whilst it is tempting to hope that things will have returned to the 2019 'normal' the events (pandemic and otherwise) of the past three years have seen major shifts in our living and working patterns. Our working and travelling routines may have changed and the suspension of everyday activity created space for us to seek out new activities or interests. On top of this, we have experienced huge increases in the costs of basics like food and heating, and undergone a period of political and economic instability; all of Scotinform's research reports from September and October 2022 started with a 'health warning' about the negative public sentiments expressed across the board, as the UK went through three prime ministers over two months. What, then, has been the impact of all this turmoil on Scotland's cultural audiences – and what next?

As ever, we were able to go to the Scotinform Cultural Panel to find out. 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 further members periodically since. The Panel has been a fantastic asset for Scotinform and our clients, and has allowed us to understand the context in Scotland in more detail. We had asked members for their views as we moved into 'Level Zero' in 2021 and as the final restrictions ended in 2022. Summer 2023, with most activity back up and running again, seemed a good time to test the water again.

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. Also, as we have found throughout the past year, customer sentiment is highly volatile and very susceptible to changes according to major public events, both Covid- and economy-related. Please bear this in mind as you read and digest.

The survey was distributed on June 29 2023 and closed on July 31. For context, the period saw mortgage rates increase to the highest level since 2008, the energy price cap reduce, three by-elections in England, and the release of *Barbie* and *Oppenheimer* in UK cinemas.

Unless otherwise stated, the figures quoted in this article are based on the **321** Cultural Panel members who responded to the survey. Thanks to each and every one of them for their contributions over the past three years.

Cultural engagement before and during lockdown

As previously discussed, this is an engaged audience. In the year before the first lockdown in March 2020, **96%** of respondents had been to a museum, **90%** to a gallery, **73%** to a garden, **78%** to a theatre, **75%** to a music concert or event, **70%** to a visitor attraction and **30%** to a zoo or wildlife attraction. Only **1%** of respondents had not been to any of these things.

When we spoke to them in August 2021, **82%** of the panel had returned to at least one of these cultural spaces following lockdown. The figure in May 2022 was **95%**. In July 2023 it was **98%**, and respondents anticipate that in 2024 it will be **99%**. Cultural audiences appear, largely, to no longer be Staying At Home.

However, there is some evidence that they are doing less. When looking at individual experience type, attendance across the sample is down compared with the year before lockdown. The proportion of visitors planning on doing each type of cultural visit in the next year is down on 2019 levels – as shown in the infographic opposite.

"The events (pandemic and otherwise) of the past three years have seen major shifts in our living and working patterns."

Proportion of visitors planning visits in the next year, compared with attendance before the pandemic

↓ 7% for museums

↓ 10% for galleries

↓ 10% for gardens

↓ 17% for visitor attractions

↓ 37% for zoos and wildlife attractions

↓ 13% for theatres

↓ 12% for music concerts or events

↓ 18% for a festival in Edinburgh

↓ 28% for another festival

Overall, **32%** of respondents say that they are visiting cultural places and doing cultural activities to a lesser extent than before the pandemic.

Explaining the changes

When asked to explain the reasons for reducing the extent of their cultural engagement, it is clear that the picture is complex. The most cited reasons for the reduction in the extent of cultural activity were:

- **I got out of the habit during lockdown (59% of those who have reduced activity)**
- **My living costs, such as bills, food, housing, have increased so I have less money to spend on cultural activity** (41%)
- **The cost of undertaking cultural activities has increased** (31%)
- **I am cautious about returning to busy places because of the Covid risk** (26%)
- **My working and travel patterns have changed so I am not near cultural spaces as often** (24%)
- **Poor health (my own or someone I care for) means that I am less able to attend now** (20%)
- **Public transport has become more difficult** (20%).

The responses reflect the 'perfect storm' scenario often described in coverage of the cultural sector; a combination of changed living and working habits during the pandemic and the current economic climate. The poor health impact, accounting for **20%** of those who have reduced their cultural activity, is perhaps discussed less often. With an ageing population and the well documented connection between economic stress and reduced physical and mental health this factor is likely to remain important and we will continue to monitor it.

Online activity

We know from our previous research that many audiences moved to online cultural consumption, perhaps for the first time, during the pandemic. This trend appears to have continued, with **48%** of respondents having experienced culture online (for example, a livestream of an event or a virtual tour of a museum) in the past year and **43%** planning to do so in the next twelve months. Online offers remain important to an audience facing increased costs, squeezed budgets, a changed work-life travel pattern, and perhaps health concerns or caring responsibilities that keep them at home more than before.

In terms of the type of online activity undertaken in the past twelve months:

56% **of those who have experienced culture online have engaged with a music concert or event**

43% **have engaged with a museum**

43% **have engaged with a gallery**

30% **have engaged with a theatre**

28% **have engaged with a festival**

11% **have engaged with a visitor attraction**

7% **have engaged with a zoo or wildlife attraction**

4% **have engaged with a garden**

"Cultural organisations should continue to anticipate demand for online engagement ... It can be an important and valued element for both casual visitors and for members."

Cultural organisations should continue to anticipate demand for online engagement. Scotinform's research for our clients has shown that it can be an important and valued element for both casual visitors and for members. However, there is clearly some work to do in terms of developing this offer; **75%** of all respondents (and **62%** of those who engage online) acknowledge that 'in person cultural experiences are better.' Any organisations that can develop and explore the potential of an online offer is likely to find a receptive audience.

Cost of living

We took the opportunity to explore the impact of the rising cost of living, and are able to compare the responses to those made in 2022. In 2022, **44%** of respondents said that they were 'concerned a little' about the cost of living crisis, and **54%** said that they were 'concerned a lot'. In 2023, things are not much better; **50%** are 'a little concerned' and **44%** are 'concerned a lot'

The effect of the economic climate on cultural engagement is evident in the impacts reported from our respondents.

Impact of the economic climate

41%
say that they have had to cut back on cultural activities as a result of the rising cost of living (47% in 2022)

50%
say that they are more likely to look for free cultural experiences or activities only (51% in 2022)

51%
say that they now spend less money (for example on food and drink) when they visit a cultural space (53% in 2022)

69%
say that they now pay more attention to the cost of cultural activities than they did previously (63% in 2022)

6%
say that they are unlikely to be able to afford to undertake any cultural activities in the future (10% in 2022)

42%
of respondents (reflecting the characteristics of the panel) say that they try to prioritise cultural activity over other things (31% in 2022)

Three new questions for 2023

19%
say that they find it difficult to justify spending on cultural activity right now

64%
have noticed that the price of cultural activity has gone up recently

29%
feel that 'cultural organisations could do more to help audiences at this time'

This last point is interesting; when asked what cultural attractions might consider doing, a range of options were suggested:

- Dedicated free or discounted days aimed at audiences who are struggling to afford full prices
- Multibuy options (for example, buy five shows, get one free)
- Control the prices of food and drink at venues
- Variable pricing, for example cheaper tickets at quieter times
- 'Pay what you can' pricing so that those who are able can contribute more in support of the organisation
- Discounts for early booking, last minute booking, or for local residents
- Family tickets to include children or grandchildren
- More/better concession ticket prices
- Packaging of tickets with transport, food and merchandise
- Offering online experiences to overcome transport costs
- Ensuring that the range of activities and events includes something for every price point
- Options to pay for tickets or membership schemes in instalments
- More donation points in venues for people to support widened access
- Try to attract more sponsorship
- Lobbying for more funding for the arts

There is no doubt that arts organisations are facing significant cost pressures. Creative approaches to pricing, that recognise the pressures also facing audiences would be welcomed, but may require more funding in themselves.

Conclusions

- To a large extent, cultural audiences have now returned to in-person cultural engagement. However, the volume of this engagement appears to be down, with a third of respondents reporting a lower level of cultural activity than in 2019.
- The pandemic and the economic climate are both factors in this decline. Interestingly, our panel also highlighted the impact of worsening health on attendance.
- There appears to be continued demand for online engagement but work is still required to make it an equivalent experience. Nevertheless, online provision can be a means of overcoming several of the economic and health barriers identified in the research.
- The cost of living is having a real impact on the range and type of cultural activity being booked, even by the most dedicated of cultural attendees. Organisations that are seen to recognise this, and are able to respond by introducing different pricing strategies, are likely to be well regarded. The extent to which they are able to do this is, of course, dependent upon their own financial stability.

Further information

For more information about the Scotinform Cultural Panel and how you can use it to answer your own research questions, or to discuss the research in more detail, please contact **helen.duncan@scotinform.co.uk**