# Scotinform Cultural Panel: Back to Business?

As we head into the summer of 2022, cultural spaces are mostly returning to something of a pre-pandemic state. Mask wearing and contact tracing measures are no longer mandatory, proof of vaccination is no longer required, and capacity audiences are now possible. At Scotinform we were interested to understand the response of cultural audiences to the 'new, old normal'.

Again, we were able to go to 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 further members 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. We had asked them for their views last summer as we moved into 'Level Zero' so this was 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 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 May 11, a couple of weeks after mandatory mask wearing had been dropped, and closed on May 21. Partygate aside, media attention was not heavily Covid-focussed during this period and there was instead continued focus on the War in Ukraine and the increase in the cost of living – more of which later.

Unless otherwise stated, the figures quoted in this article are based on the 241 Cultural Panel members who responded to the survey. Thanks to each and every one of them for their contributions over the past two 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, **91%** to a gallery, **80%** to a garden, **78%** to a theatre, **76%** to a music concert or event, **67%** to a visitor attraction and **25%** to a zoo or wildlife attraction. Every respondent had done at least one 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%**. Cultural audiences appear, largely, to have returned.

There is some variation in the extent of this return, however. At one end of the scale, **78%** of those who visited gardens prior to lockdown have returned since. In contrast, just **59%** of pre-lockdown theatre goers and **60%** of pre-lockdown concert attendees have returned in the past year. This is a considerable reduction – nearly **40%** of previous audiences have not yet returned to some sectors – and is likely a combination of both supply (the extent to which spaces have been able to open during the past year) and demand and consumer confidence in these spaces.

**91% of the respondents who had visited a cultural space in the past year said that they felt comfortable in it**

**nearly 40% of previous audiences have not yet returned to some sectors**

The good news for operators is that they succeeded in making visitors feel comfortable as far as Covid-19 was concerned. **91%** of the respondents who had visited a cultural space in the past year said that they felt comfortable in it – and the figure was the same for those who visited spaces after the mask mandate was dropped on April 18 this year.

# 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 small level of caution still evident. **3%** said that they do not feel comfortable returning to cultural spaces at all yet (down from **7%** in 2021), and **33%** that they are comfortable returning to outdoor spaces only (up from **24%** in 2021). At the other end of the scale, **65%** say that they have no concerns about returning to indoor or outdoor spaces – a significant increase on the **11%** of respondents in this category in 2021.

This is reflected in the fact that **99%** of respondents anticipate returning to some form of cultural activity in the next six months, with nearly half having made concrete plans in the form of booking tickets or making arrangements to visit on a specific date. **44%** have booked or actively planned to go to a music concert or event, **33%** to the theatre, **30%** to an art gallery, **22%** to a museum, **16%** to a garden and **5%** to a zoo or wildlife attraction.

# Covid Safer Sessions

Scotinform had noted in the media and within the sector some references to 'Covid-safer' sessions or performances, with measures in place to minimise the transmission of infection. **63%** of respondents thought that this was a good idea and **81%** of these would attend a session like this in a cultural space – most likely in theatres, music concerts, museums and galleries. **67%** of these individuals said that they would return to more cultural spaces if they could attend more sessions like these; **4%** said that if these sessions were not in place they would not return to cultural spaces.

When asked about the specific measures that they would like to see, **91%** of respondents who would come to these sessions would like to see a limit on the total number of people in the building. **73%** would like to see ventilation maximised, with windows and doors open where possible. **69%** would like to see staff and visitors wearing face coverings and **58%** would like social distancing measures to prevent the mixing of households.

Sessions incorporating some or all of these measures may be a way for cultural venues to continue to include audiences who remain cautious about the spread of infection.

# 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, if it means increased exposure to Covid? We asked these questions in August 2021 and were interested to see what has changed in the intervening period. As in 2021, there is some indication of a reduction in the economic impact of a cultural visit.

> **'Covid safer' sessions may be a way for cultural venues to continue to include audiences who remain cautious about the spread of infection**

**22%** 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 (the figure in August 2021 was **35%**). **27%** 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 (**38%** in 2021). **19%** 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 (**29%** In 2021). Whilst these impacts are slightly less than in 2021, it is still significant that up to a quarter of cultural consumers would eliminate or reduce economic activities that previously used to feature in their cultural activity.

There also appears to be a potential impact on party size. **14%** 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 is down from **23%** in 2021.

Overall, it appears that there is continued evidence that the economic impact of a cultural visit in 2022 will be lower than it was in 2019, due to a desire to avoid multiple locations and large parties. In 2021 we said that this trend – to go to fewer places 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. However, there are also other factors at play affecting secondary spend in 2022.

## The Cost of Living

Given the timing of the survey, we were interested to understand whether the increased cost of living was also impacting on future plans. Our survey showed some significant potential impacts, even amongst this warm cultural audience:

- **63%** said that they would pay more attention to the cost of cultural activities than they did previously
- **53%** said that they would be less likely to spend money (for example on food and drink) when they visit a cultural space
- **51%** said that they were more likely to look for free experiences or activities only
- **47%** of respondents felt that it is likely that they will need to cut back on cultural activities
- Reflecting the preferences of the sample, **31%** said that they would prioritise cultural activities over other things
- **10%** said that they were unlikely to be able to afford to undertake any cultural activities in the future

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## Conclusions

- **When compared to the Scotinform Cultural Survey in 2020 and our Level Zero Survey in August 2021, the signs of post-Covid return are cautiously positive.**
- **Nearly all of the respondents have plans to undertake cultural activity in the coming year, although there is variation across sectors; theatres and music concerts appear to be more concerning than gardens.**
- **Respondents are largely comfortable returning to cultural spaces although there is a sizeable cohort that remains cautious. 'Covid-safer' sessions might be an opportunity to include and re-engage this audience.**
- **There is continued evidence that the economic impact of a cultural visit in 2022 will be lower than in 2019, due to a desire to avoid multiple locations and large parties.**
- **Further, even this enthusiastic and engaged audience is anticipating a decline in cultural consumption as a result of the cost of living crisis. This is likely to pose a significant challenge to the sector even as it starts to recover from the pandemic.**

## Further Information

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

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