Creative Scotland Audience Intentions Survey: Impacts of rising costs of living

Fieldwork from 15th to 27th March 2023

Creative Scotland
12th March 2023

Contents

Background

A series of online surveys tracking the Scottish population's behaviours and attitudes

- Between 2020 and 2022, Creative Scotland commissioned 56 Degree Insight to undertake four waves of research (in July 2020, November 2020, May 2021 and February 2022) to measure and track the Scottish adult population's behaviours and attitudes towards arts attendance. During this period the key focus was on views and behaviours relating to the Covid-19 pandemic and related restrictions.
- In 2023 while levels of concerns over Covid-19 are much reduced and restrictions have been eased allowing the sector to re-open, a number of factors including rising energy prices have led to significant increases in the costs of living for the Scottish population and the costs of operating businesses in every sector.
- Creative Scotland have therefore commissioned a further wave of this research to obtain an updated picture on levels of arts attendance and attitudes towards attendance, this time with a particular focus on the impacts of rising costs.
- An online approach has been used with fieldwork for the 2023 wave undertaken between the 15th and 27th March 2023. 1,102 interviews were conducted with sample drawn from the Dynata online panel. Geographic and demographic quota controls were used to ensure that the sample was representative of the population. Also an additional boost of 100 interviews was conducted with members of the BAME population to allow for separate analysis of results on the basis of this group.
- The table on the right illustrates the unweighted profile of the sample by key demographics. Note that weighting has been applied at the data analysis stage to correct for any imbalances between the sample and population profile including adjusting for the over-representative of the BAME population within the unweighted sample.

	Sample size
Sex	
Male	512
Female	585
Other	4
Age	
16-34	342
35-54	331
55+	429
Socio-economic group	
ABC1	600
C2DE	445
Ethnicity	
White	962
BAME	140

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General impacts of rising costs on life and finances

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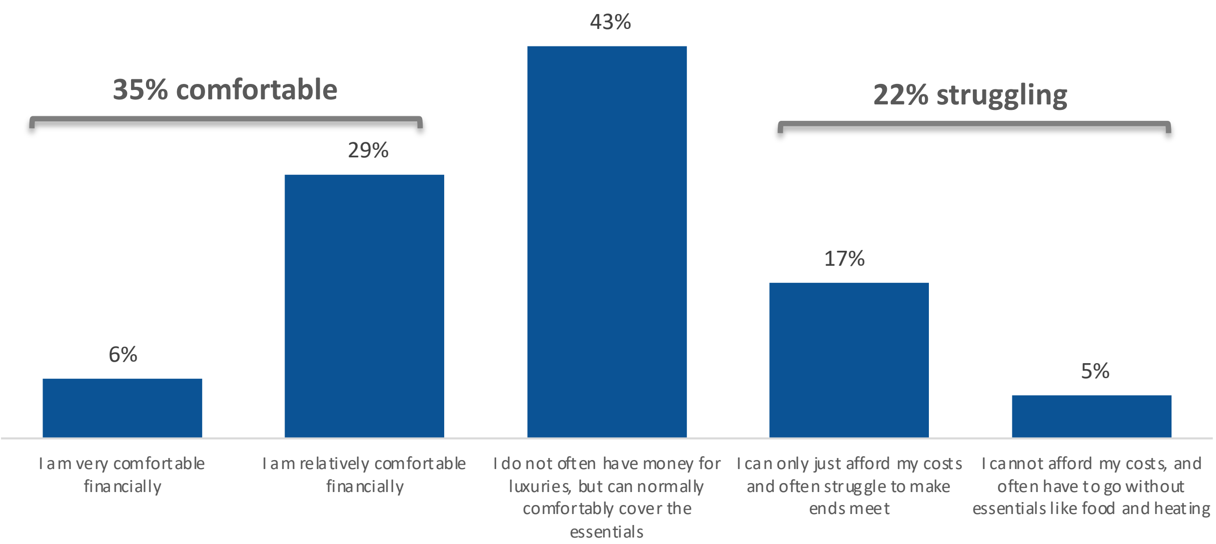
Almost a quarter of Scottish adults are struggling financially. Younger people and the least affluent social grades re most impacted

- As context respondents were asked a number of questions regarding their current financial situation and the broader impacts of rising costs on their life.
- Overall around a third (35%) feel very or relatively comfortable financially. Groups more likely to give this response included:
  - Men (46% vs 25% of women)
  - People aged 55+ (46%)
  - ABC1 social grades (47%)
  - Residents of 10% least deprived SIMD areas (66%)
- In contrast, 22% of the population are struggling with costs to some extent. Groups more likely to give this response included:
  - Women (27% vs 15% of men)
  - People aged 16-34 (29%)
  - C2DE social grades (32%)
  - People with a long term illness or disability (28%)

Figure 1 – Current household financial situation



Thinking about your finances, which of the following best reflects your position?

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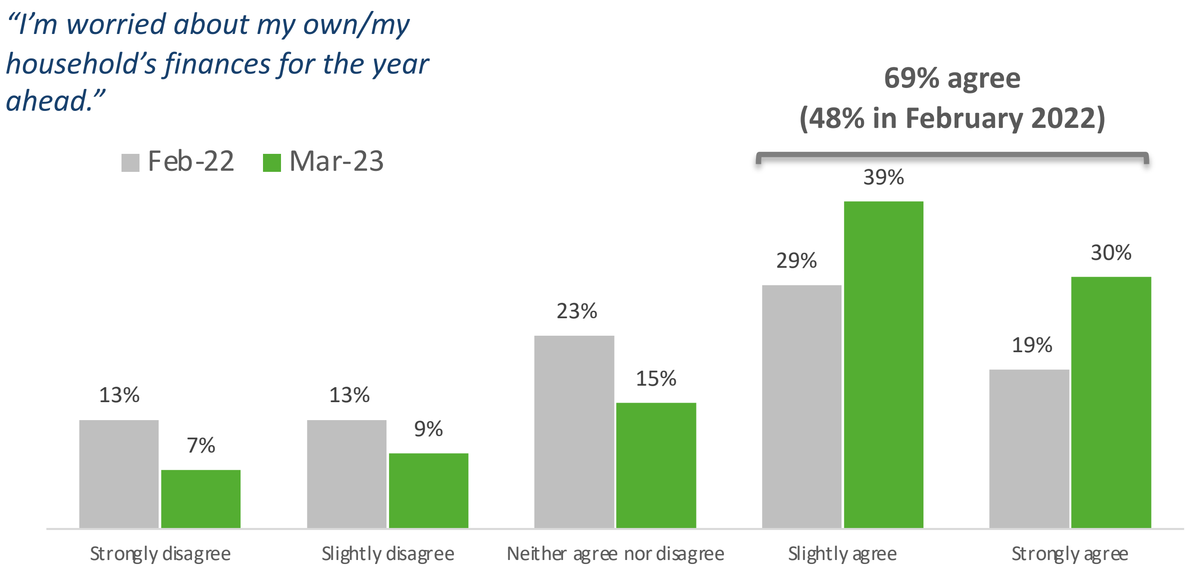
Two thirds of the population are worried about their household finances in the year ahead, an increase from around half a year ago

- Just over two-thirds of the population agree to some extent that that they are worried about their household's finances for the year ahead (69%), a significantly higher percentage than when this question was asked in February 2022 (48%).
- 30% strongly agree with this statement, an increased from 19% a year ago. This percentage is higher amongst women (35%), people aged 45-54 (40%) or 16-34 (36%), C2DEs (36%), people with a long term illness or disability (37%) and members of the BAME population (36%).

Figure 2 – Attitudes toward household finances for year ahead

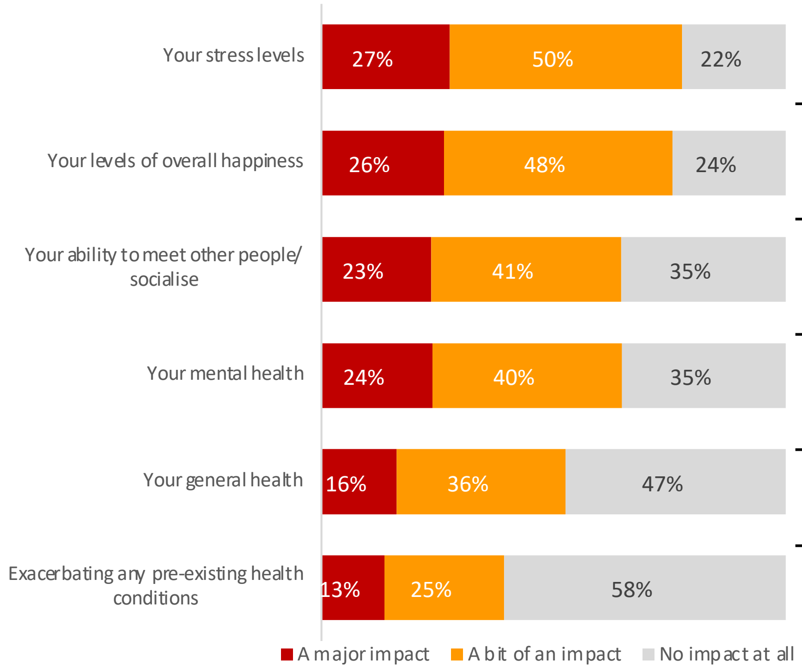


Thinking about your household finances, to what extent do you agree of disagree with the following statement?

For more than half of the population, the cost of living crisis is impacting upon stress levels, happiness and mental health

- The cost of living is impacting on the population in a variety of ways. As shown on the right, the largest percentages reported impacts on their stress levels, overall happiness, ability to socialise and mental health.
- Groups most likely to be impacted in a range of different ways include women, younger age groups, those with children at home, those in lower socio-economic groups, people with a long term illness or disability and members of the BAME population.

Figure 3 – Impact of cost of living crisis on aspects of life



To what extent is the cost of living crisis having an impact on the following areas relating to how you are feeling at the moment…?

Major/ bit of an impact	Higher amongst
77%	Women (86%) 16-44 (91%) C2DEs (82%) Children in home (88%) BAME population (86%)
74%	Women (82%) 16-44 (83%) C2DEs (78%) Children in home (81%) Long term illness/disabled (82%)
64%	Women (70%) 16-54 (73%) C2DEs (69%) Children in home (72%) BAME population (70%)
64%	Women (73%) 16-44 (80%) C2DEs (69%) Children in home (76%) Long term illness/disabled (74%)
52%	Women (59%) C2DEs (56%) Children in home (59%) Long term illness/disabled (67%)
37%	Women (41%) C2DEs (44%) Long term illness/disabled (69%)

Arts and cultural experiences during the last 12 months

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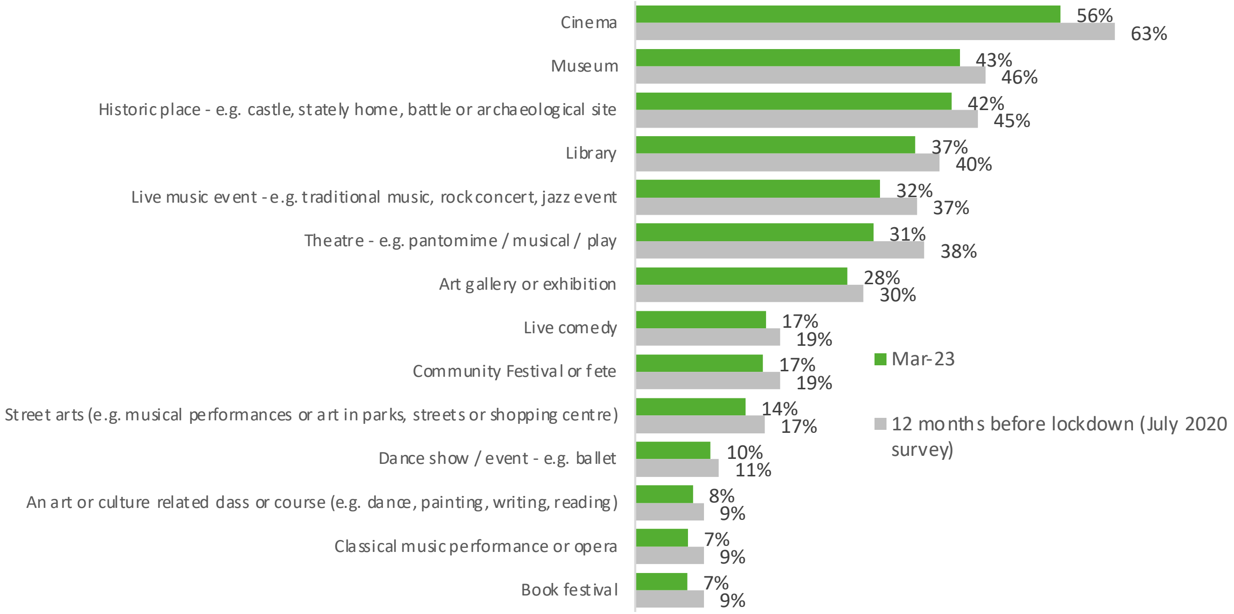
Levels of arts and cultural participation were lower in the last 12 months than in the 12 months prior to the first Covid-19 lockdown

- Respondents selected the cultural events or places they had attended in the last 12 months from the list shown in Figure 4.
- These results are compared with responses to a similar question asked in the July 2020 survey relating to the 12 months prior to the first Covid-19 lockdown (i.e. April 2019 to March 2020).
- In both periods the largest percentages of the population had attended cinema, museums, historic places or live music events. However it is notable that the percentages most of the activities asked about were higher pre-pandemic. The most notable decreased include cinema (from 63% to 56%) and theatre (from 38% to 31%).
- Overall 87% had attended any of the events or places shown during the 12 months prior to March 2023, By comparison in July 2020 survey 96% claiming to have attended any of the same list of activities in the 12 months prior to lockdown.

Figure 4 – Cultural events and places attended during last 12 months (compared 12 months before first lockdown as recorded in July 2020 survey wave)



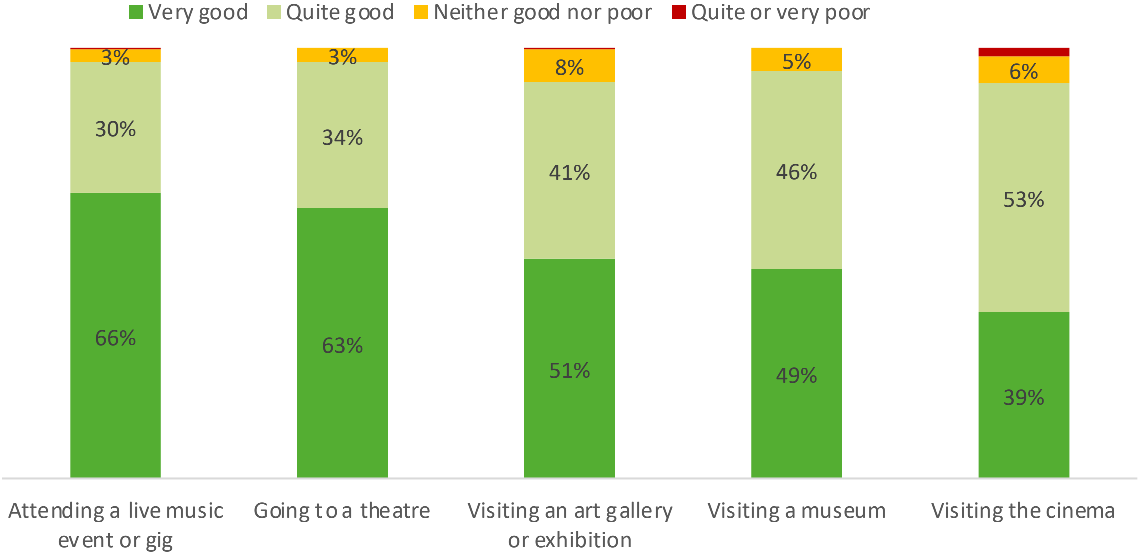
During the last 12 months did you go to any of the following types of cultural events or places?

2020 wording: In the 12 months prior to the start of lockdown on 23rd March, did you go to any of the following types of cultural events or places?

In general the quality of experiences of attending cultural activities have improved since a year ago, in particular for live music and theatre

- Respondents who had attended the types of events and places shown in Figure 5 were asked a series of questions about the quality of the experience, pricing and value for money.
- While feedback on the quality of the experience was predominantly positive for all of the activities asked about, the top rating of 'very good' was most likely to be provided in relation to live music events or going to the theatre.
- In contrast those attending the cinema were more likely to provide a rating of just 'quite good'.
- When the same question was asked about recently attended events in February 2022 lower percentages provided the very good rating in relation to all of the activities except cinema.

Figure 5 – Satisfaction with most recent experiences of arts and cultural activities or venues



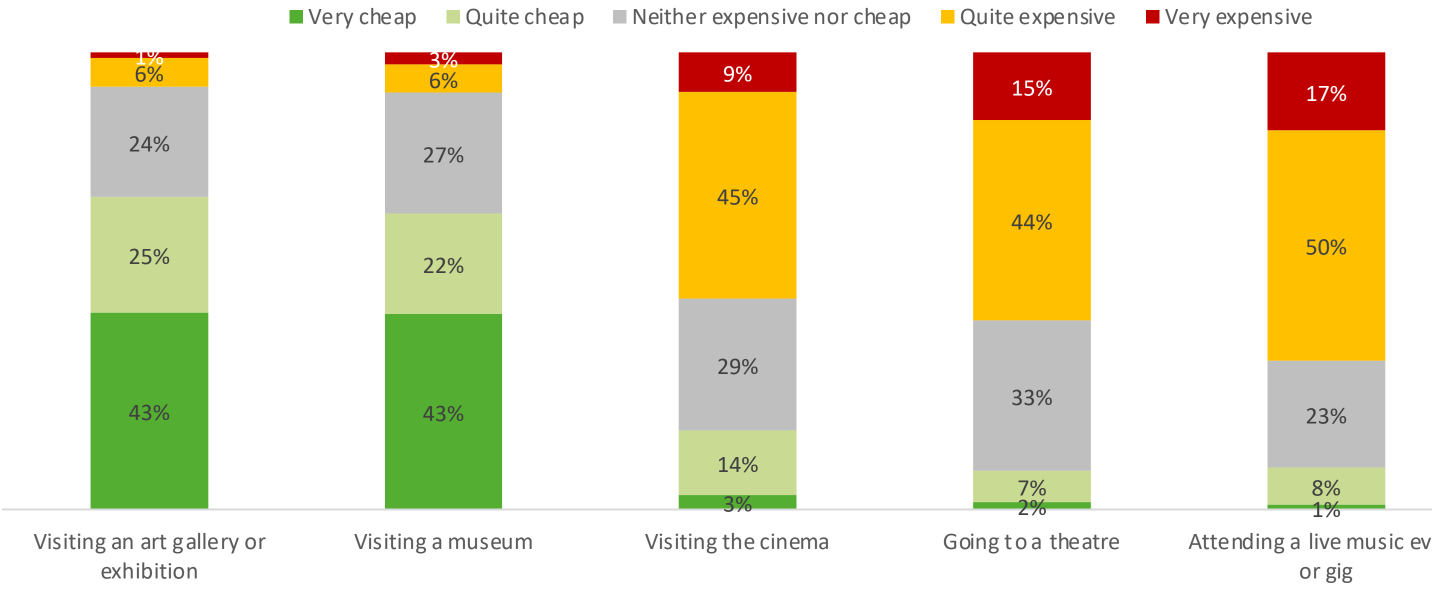
	Attending a live music event or gig	Going to a theatre	Visiting an art gallery or exhibition	Visiting a museum	Visiting the cinema
Very Good in February 2022	44%	52%	41%	42%	44%

Overall how would you rate the quality of your experience?

Attending art galleries and museum is often seen as being 'cheap' while cinema, theatre and live music are usually perceived as expensive

- Ratings for the price to attend were somewhat more varied with just over half rating art galleries and museums as very or quite cheap while over half rated cinema, theatre and live music as very or quite expensive.
- Most notably two in three (67%) rated the live music events attended as being quite or very expensive.

Figure 6 – Rating of price to attend arts and cultural activities or venues

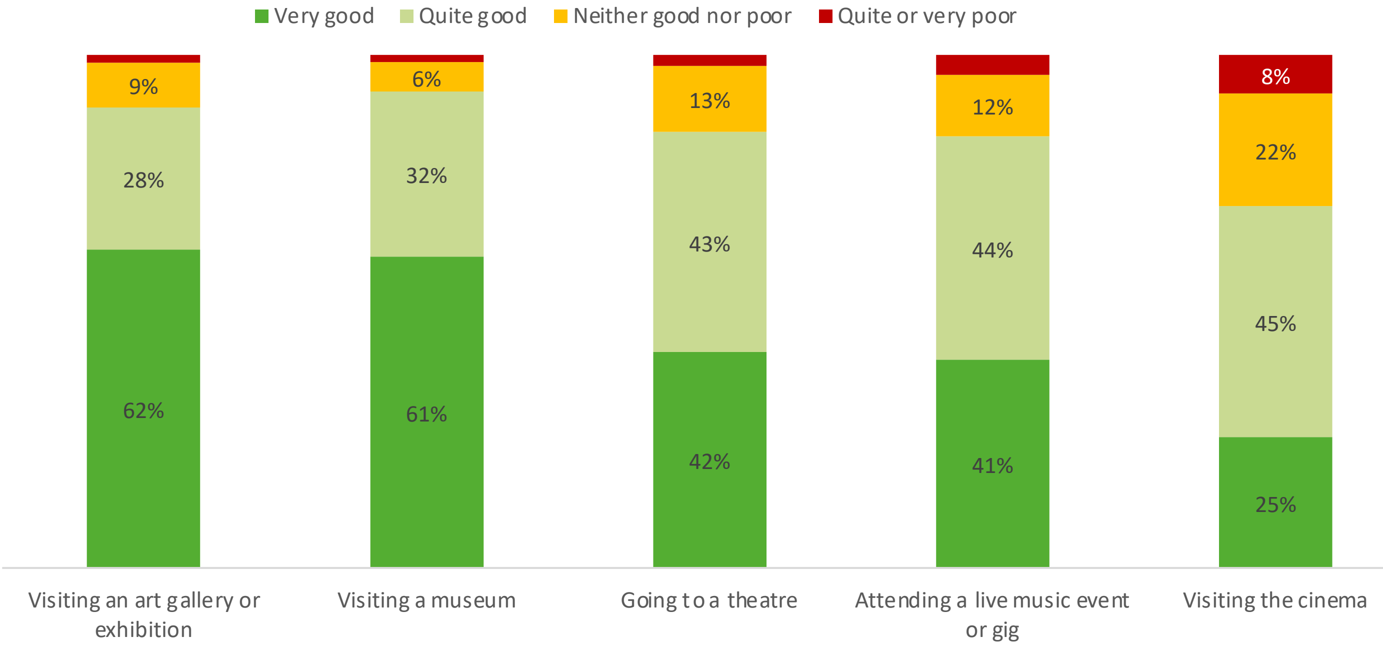


And how would you rate the price that you paid to attend?

Considering price and experience together, all of the activities asked about are largely seen as providing quite or very good value for money

- Taking both the experience and the price paid into account, the majority of those attending each of the types of events and places included rated value for money as either very or quite good.
- However while art galleries and museums were particularly likely to receive the highest 'very good' rating, only a quarter provided cinema with this rating.
- Respondents were asked to provide further thoughts in relation to the price and value for money of arts and cultural activities. A selection of verbatim comments are provided overleaf including some from participants happy with the value received and some from those who felt that prices were too high.

Figure 7 – Satisfaction with value for money on most recent experiences of arts and cultural activities or venues



And considering the experience you had, how would you rate the value for money you obtained?

While most have seen prices to attend events increase, many still feel that value for money is obtained or are happy to support the sector

"Farewell concert for venue closing. No complaints regarding atmosphere, price of ticket or quality of band."

"Everything is more expensive at the moment however I am sure that the arts suffer the most and are always good value for money."

"As I am a pensioner I get into cinema cheaper and I go early when it's nice and quiet."

"You can spend the whole day at the museum and its really cheap so it's a great day out. I get to show my son things to stimulate his mind."

"The museum was good and had a good variety of art and items to look at and learn about."

"The price of snacks can be expensive."

"Love the theatre but find it very expensive."

"Attended a few gigs at the Hydro, which have been great in terms of venue/seating/sound quality etc. However tickets can be pricey and food and drink inside the venue are extremely pricey."

"The musical was great and a good atmosphere and production but the tickets were expensive."

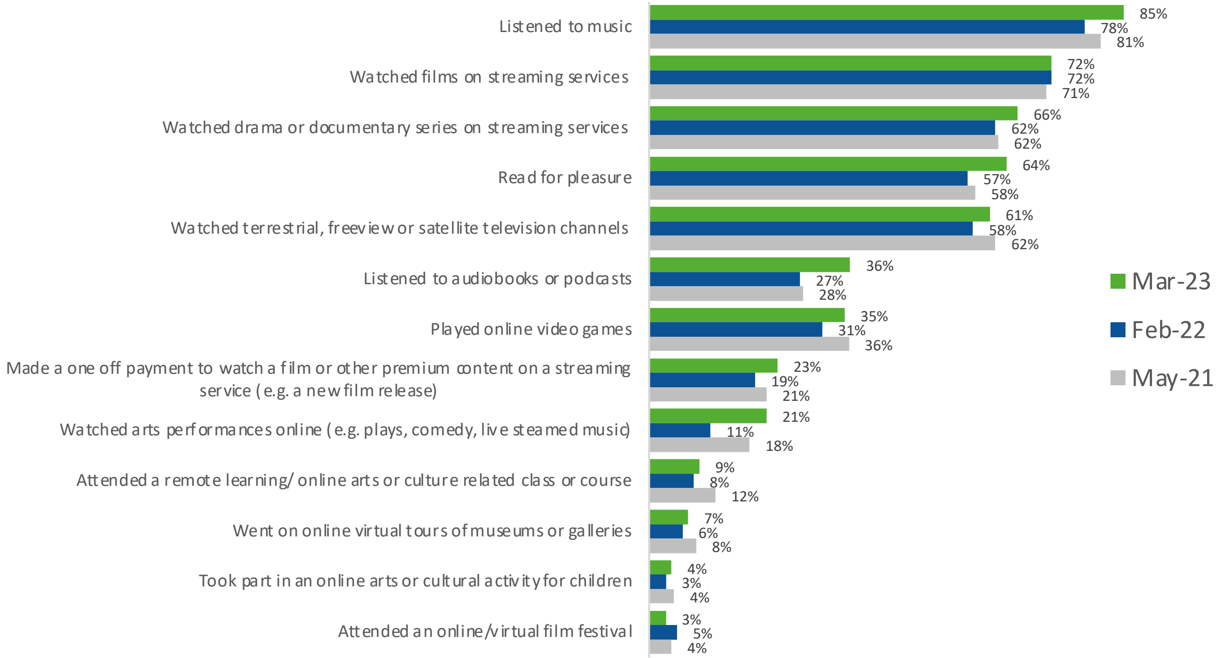
"The price of music gigs is becoming ridiculous with sites like Ticketmaster changing how they charge for tickets."

Please provide more details on your experience including any highlights, areas that could have been improved or further comments relating to the price or value for money.

During the last 6 months most of the population have listened to music, watched films, drama or documentaries or read for pleasure while at home

- Respondents were asked if they had undertaken any of the activities shown in Figure 8 while at home during the last 12 months. This question was previously asked in May 2021 in relation the whole period since the first lockdown began and in February 2022 in relation to the preceding 6 months.
- The most commonly undertaken activities continue to be listening to music (85%) and watching films on streaming services (72%) while two thirds had watched dramas or documentaries (66%) and/or read for pleasure (66%).
- Participation in a number of the activities has increased since February 2022, in some cases returning to the higher levels recorded during the first lockdown period.

Figure 8 – Activities undertaken at home during last 12 months (asked about last 6 months in February 2022, since pandemic began in May 2021)



And during the last 12 months which of the following cultural activities, if any, have you done at home?

Expected future arts and cultural attendance

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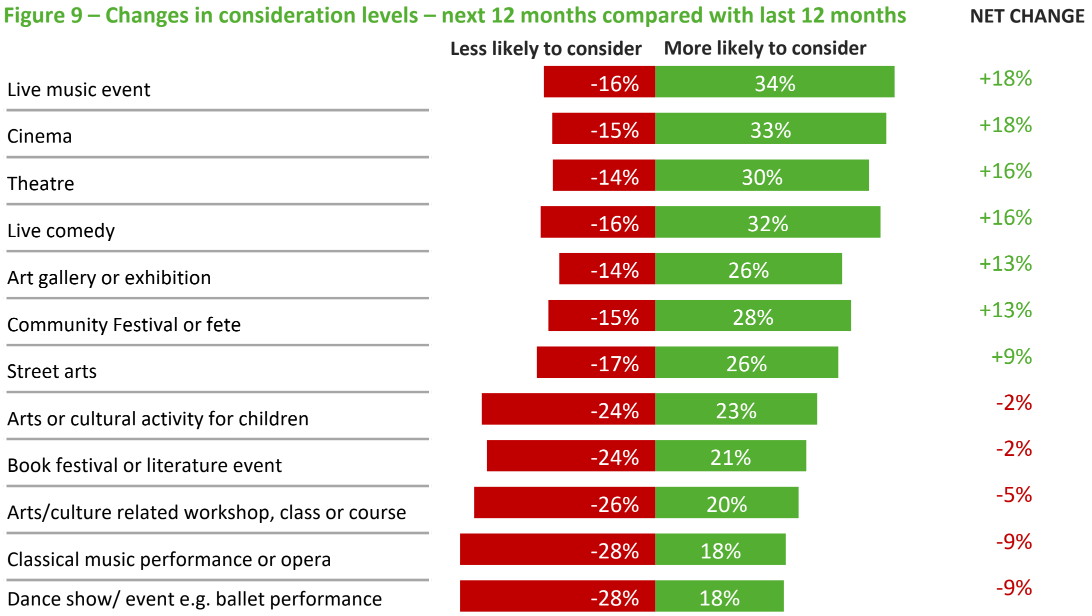
Compared to the last 12 months, levels of demand for the next year are varied with a net increase in interest in live music and cinema but decreases for some other activities

- Respondents were asked how, if at all, their consideration for different cultural activities and events during the next 12 months compared with the last 12 months with a range of options possible (‘more likely to consider’, ‘no difference’, ‘less likely to consider’ and ‘would not have considered before and still would not’).
- Figure 9 summarises the results excluding those who would not have considered an activity and illustrating the net change recorded in each of the survey waves (% more likely minus % less likely).
- Overall these results suggest overall increased demand for a number of the activities including live music, cinema, theatre and live comedy.
- However an overall negative net change is recorded for a number of the other activities including classical music performances and opera and dance shows.

Figure 9 – Changes in consideration levels – next 12 months compared with last 12 months



First of all, compared with the last 12 months, to what extent if any are you any more or less likely to do the following activities during the next 12 months?

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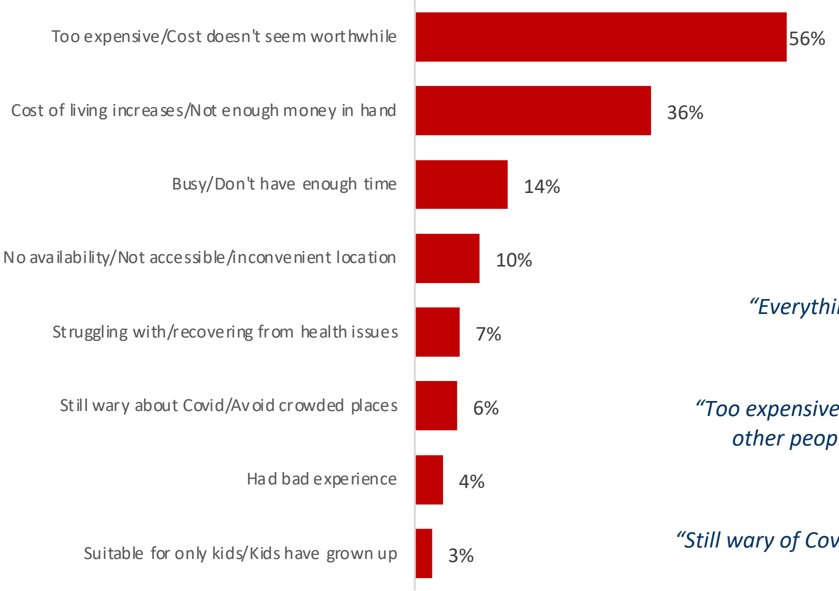
While a number of factors are referenced, cost is the most common reason given for being less likely to consider attending

- Respondents who indicated that they were less likely to attend arts and cultural activities during the next 12 months were asked to provide further details (an open ended question coded to the categories shown in Figure 10).
- Cost was the most frequently provided reason, mentioned by over half of respondents who were less likely to attend in future.
- Other reasons included being too busy and a lack of suitable options for them to attend.

Figure 10 - You stated that you are less likely to consider one or more arts or cultural activity now that 12 months ago. In your own words, please explain why this is the case



"I have no interest in ever returning to the cinema. Overpriced and ruined by other people talking and playing on phones."

"I think it is a question of being careful with spending."

"Everything costs money and with the cost of living going up it's just not top of things to do."

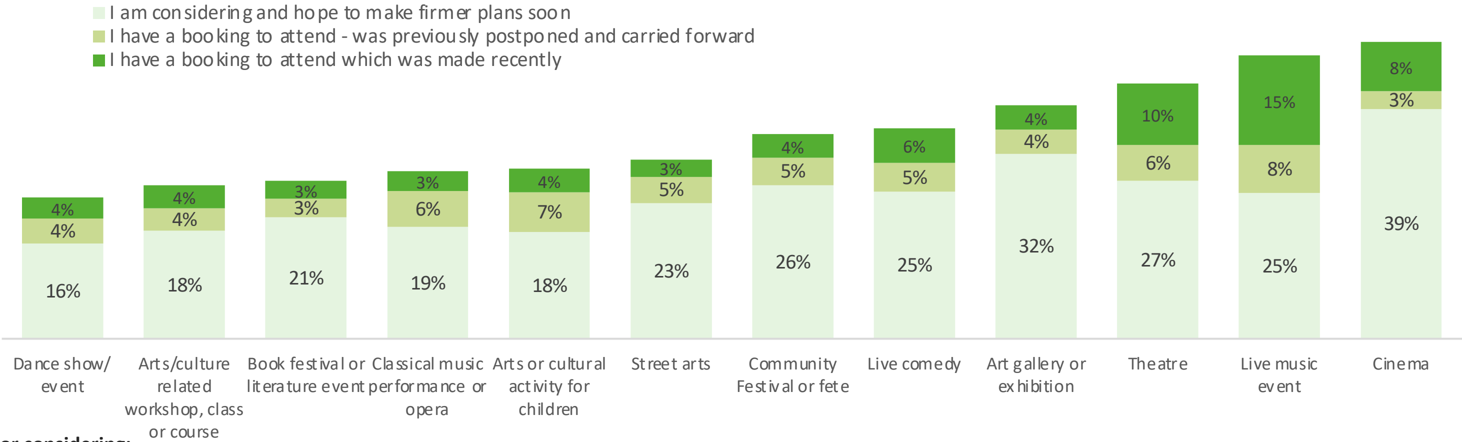
"Too expensive and too crowded to enjoy. To many queues and other people being rude. Useless tat stalls and food too expensive."

"Still wary of Covid / other health concerns when in crowds."

With the exception of art galleries, the proportions booked or planning to attend arts and cultural events is lower than a year ago

- Respondents were asked whether they had any bookings to attend arts and cultural activities or if they were considering attending.
- Combining those booked and considering, the largest proportions were expecting to attend the cinema or live music in the future (51% and 48% respectively).
- Live music was the activity which people were most likely to have a booking for (23% overall).
- Compared to February 2022 lower percentages were considering or had booked any of the activities with the exception of visiting an art galley or museum

Figure 11 – Booking and plans to attend arts and cultural activities in future



Total booked or considering:

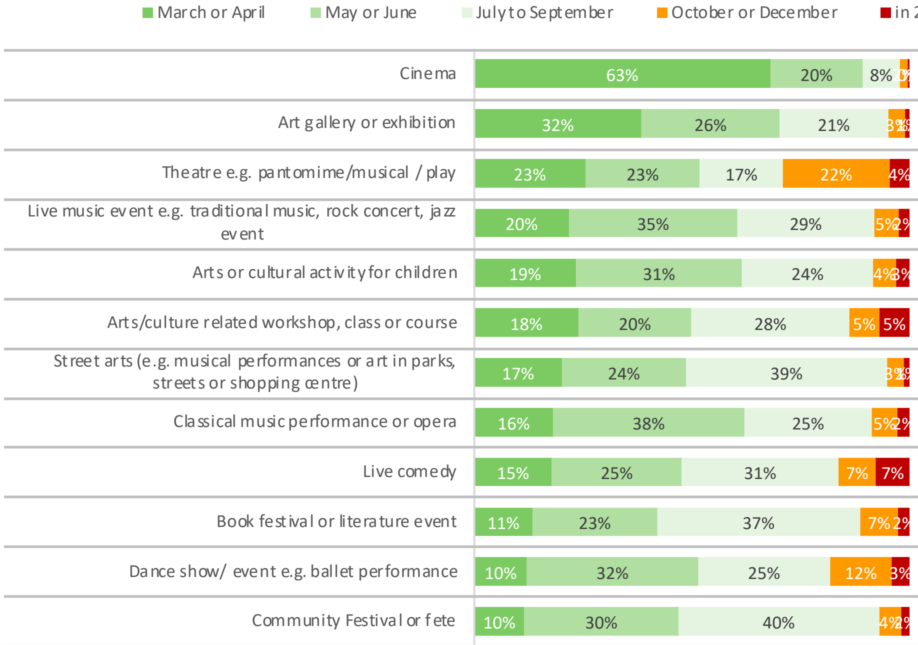
	Dance show/ event	Arts/culture related workshop, class or course	Book festival or literature event	Classical music performance or opera	Arts or cultural activity for children	Street arts	Community Festival or fete	Live comedy	Art gallery or exhibition	Theatre	Live music event	Cinema
Mar-23	24%	26%	27%	29%	29%	31%	35%	36%	40%	43%	48%	51%
Feb-22	47%	41%	51%	57%	33%	43%	41%	55%	43%	47%	58%	61%
May-21	34%	47%	44%	41%	31%	43%	37%	52%	37%	40%	53%	50%

Do you have any bookings or plans to attend any of the types of arts and cultural activities you stated that you would consider doing in future? For each activity select the answer option which applies to you

While most who plan to visit the cinema expect to go in the next two months, other activities are more likely to be attended in late spring or summer

- Those respondents who had booked or were planning to attend events or activities were asked when they expected to attend. Figure 12 summarises the responses for each activity, excluding those stating that they didn't know when they would go.
- 63% expected to attend the cinema within the next 2 months (i.e. in March or April 2023) while around a third each expected to attend an art gallery within this time period (32%).
- In contrast, plans to attend live comedy, literary events, dance shows or community events were likely to be further into the future.

Figure 12 – When plan to take part in cultural and other leisure activities



	Mar-Apr '23	Later in 2023
Cinema	63%	39%
Art gallery or exhibition	32%	51%
Theatre e.g. pantomime/musical / play	23%	62%
Live music event e.g. traditional music, rock concert, jazz event	20%	70%
Arts or cultural activity for children	19%	59%
Arts/culture related workshop, class or course	18%	53%
Street arts (e.g. musical performances or art in parks, streets or shopping centre)	17%	66%
Classical music performance or opera	16%	68%
Live comedy	15%	63%
Book festival or literature event	11%	67%
Dance show/ event e.g. ballet performance	10%	69%
Community Festival or fete	10%	75%

When do you expect to attend this art of cultural activity? (if you plan to attend on more than one occasions select the first occasion you expect to attend) Base: Those who have booked or are considering attending in future, excluding Don't Know responses.

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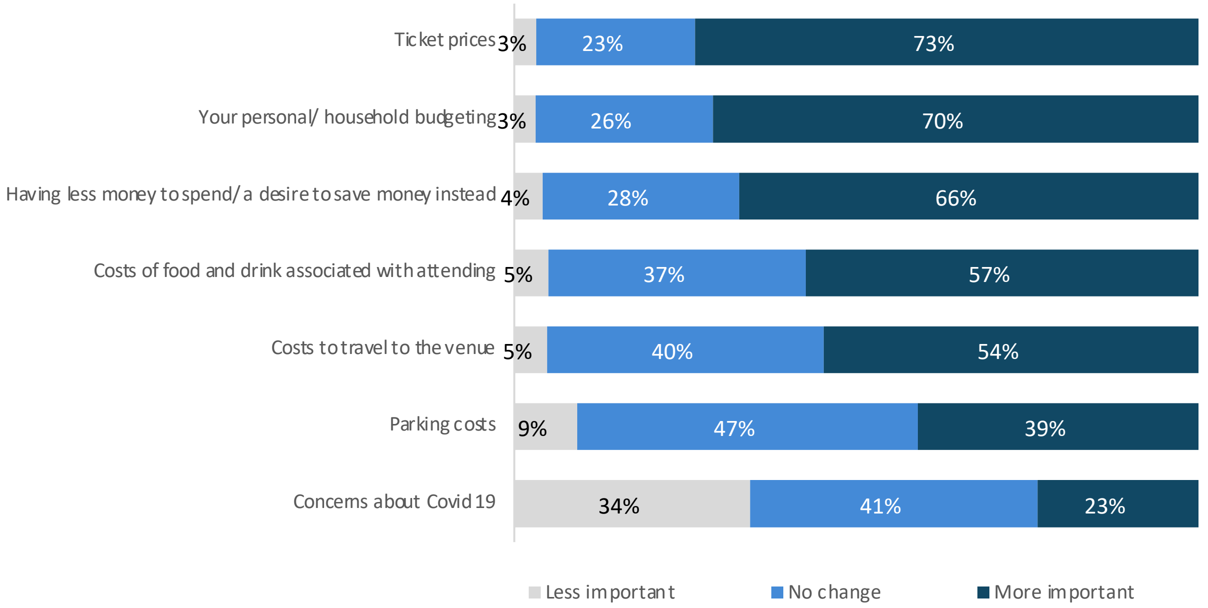
Almost three quarters state that ticket prices have become a more important consideration when deciding whether to attend

- All respondents were asked to what extent, if any, different factors had become any more or less important when deciding whether to attend arts and cultural activities.
- Two-thirds or more stated that ticket prices, personal/ household budgeting considerations or having less money to spend had become more important to them.
- The costs of food and drink and travel had also become more important for over half.
- Groups more likely to say that factors relating to price had become more important included women, younger age groups, those in the C2DE social grades, members of the BAME population and people who indicated that they are struggling financially.

Figure 13 – Impact of different factors on decisions to attend arts and cultural events and venues comparted to a year ago

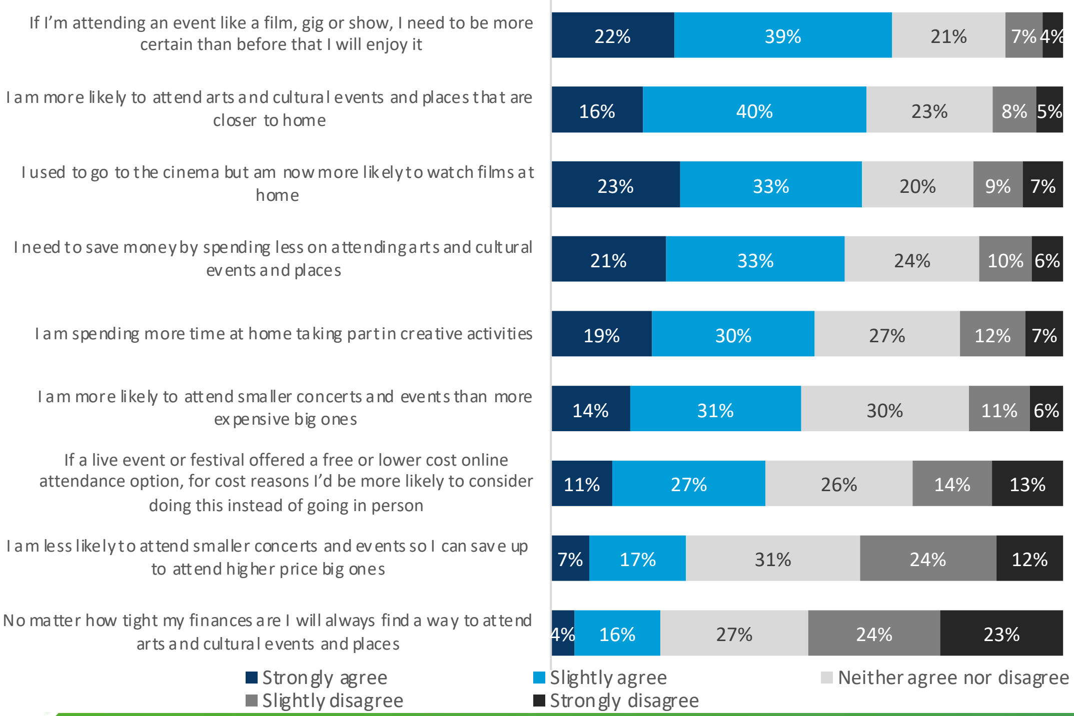


When you are deciding whether to attend arts and cultural events and venues, to what extent, if any, have the following factors become any more or less important to you than a year ago?

Increasing costs are impacting on decisions for the majority with around half cutting back on their expenditure on arts and culture

- Asked to respond to the statements shown in Figure 14, three in five Scots agreed that with increasing costs of living being certain that an event would be enjoyable had become more important than before.
- Also over half agreed that they need to save money by spending less on arts and cultural events and places.
- Reflecting previous findings regarding the impacts of rising costs, women, younger age groups, families, members of the BAME population and people who were struggling financially were the groups most likely to be making changes to how they attend and engage with the arts.

Figure 14 – Impacts of cost on attitudes to arts and cultural attendance



Strongly/ slightly agree	Higher amongst
62%	Women (66%), people aged 16-34 (68%), struggling financially (65%)
56%	Women (60%), ABC1s (61%)
56%	Women (60%), people aged 16-34 (66%), people with children at home (63%), struggling financially (61%)
54%	People aged 16-34 (61%), people with children at home (61%),BAME population (67%), struggling financially (64%)
48%	Women (57%), people with children at home (58%), BAME population (68%), struggling financially (55%)
45%	People aged 16-34 (52%)
38%	Women (42%), people aged 16-34 (50%), people with children at home (45%), BAME population (52%)
24%	Women (27%), people aged 16-34 (38%), people with children at home (31%), BAME population (38%)
20%	People aged 16-34 (31%), ABC1s (26%), financially comfortable (29%)

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While cost of living concerns could drive an increase in participation in creative activities at home, over half of the population are less likely to attend paid attendance arts and cultural event

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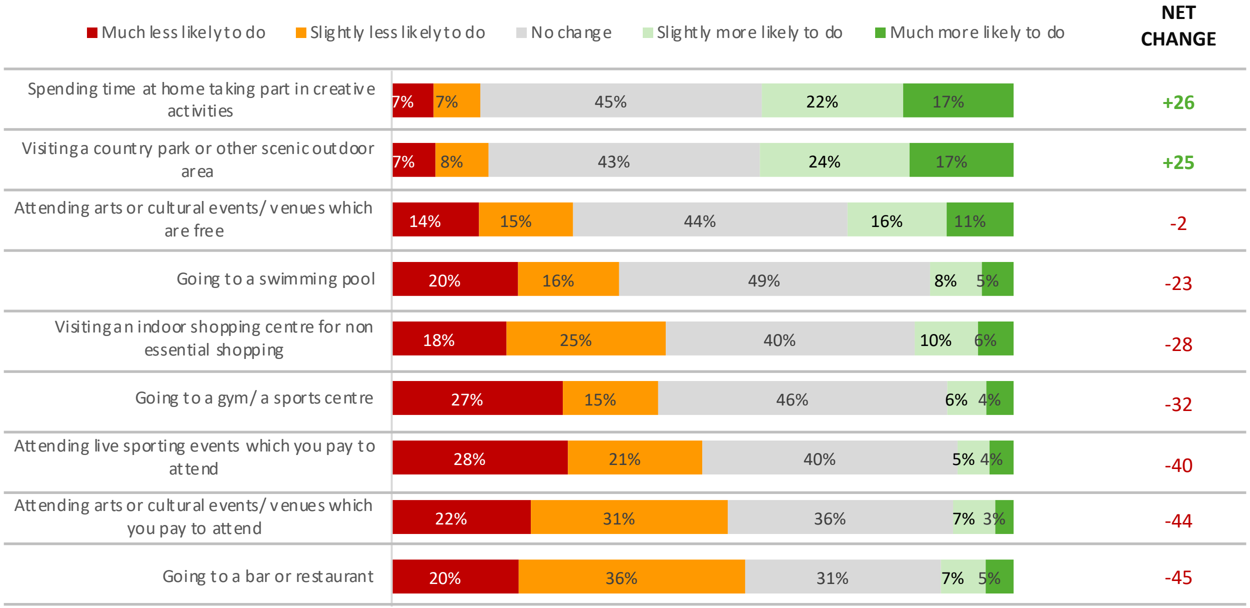
- Respondents were shown a list of leisure activities, including attending arts and cultural events, and asked to what extent, if any, they would be more or less likely to do each of these now than would have been the case before the cost of living crisis.
- An overall net increase reported that they were more likely to spend time at home taking part in creative activities or taking trips to country parks or other scenic.
- With similar percentages either more or less likely to attend, the net change for free of charge arts and cultural events/venues was minimal.
- However the majority indicted that they were less likely to take part in a number of activities including attending attending arts or cultural events/ venues which you pay to attend.

Figure 15– Potential changes in cultural and leisure activities given cost of living concerns



Given this situation to what extent, if any, do you feel that you and your household are any more or less likely to do the following activities than would have been the case before the cost of living crisis?

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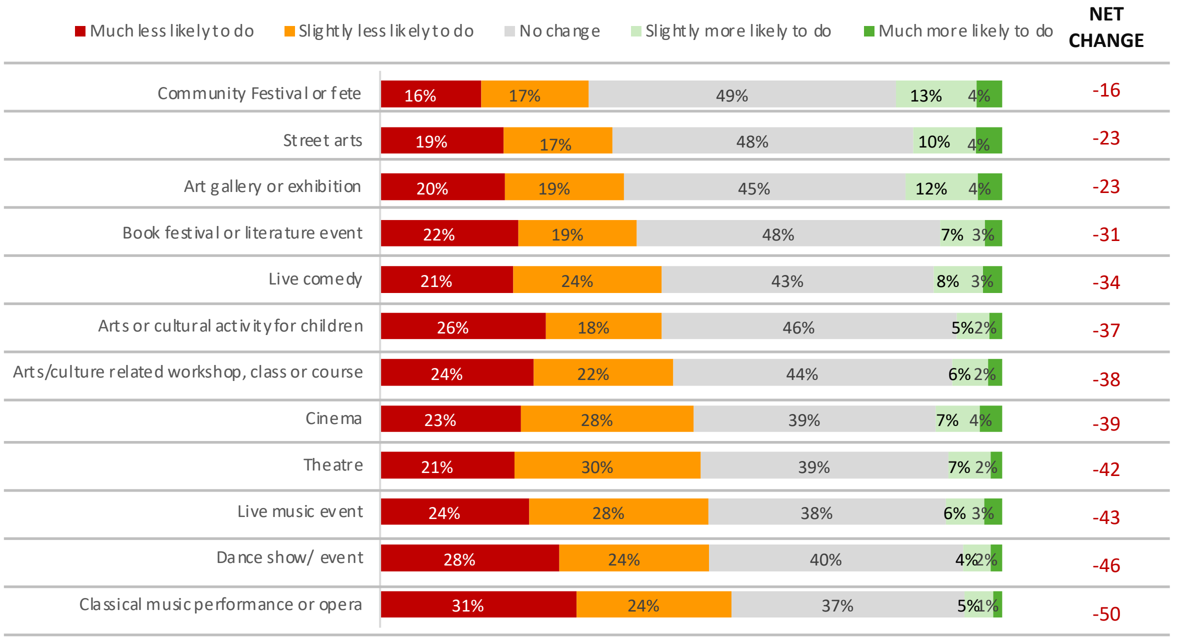
The negative impact of cost of living concerns could be most pronounced for theatre, live music, dance and classical music and opera

- A similar question was asked in relation to likely changes in attendance to different types of arts and cultural events and places given the increasing costs of living.
- As shown in Figure 15 while a negative net change was recorded for all of the activities asked about, this was most pronounced for theatre, live music events, dance shows and classical music performances.
- A follow up question was asked of those stating that they were less likely to attend, asking whether they believed that costs for attendance had increased. Overall 96% stated that from their experience costs to attend had increased with 76% believing ticket prices had increased, 66% stating that the cost for items bought at the event had increased (e.g. food and drink, merchandise) and 60% stating that costs to travel to venues had increased.

Figure 15 – Potential changes in arts and cultural attendance given cost of living concerns

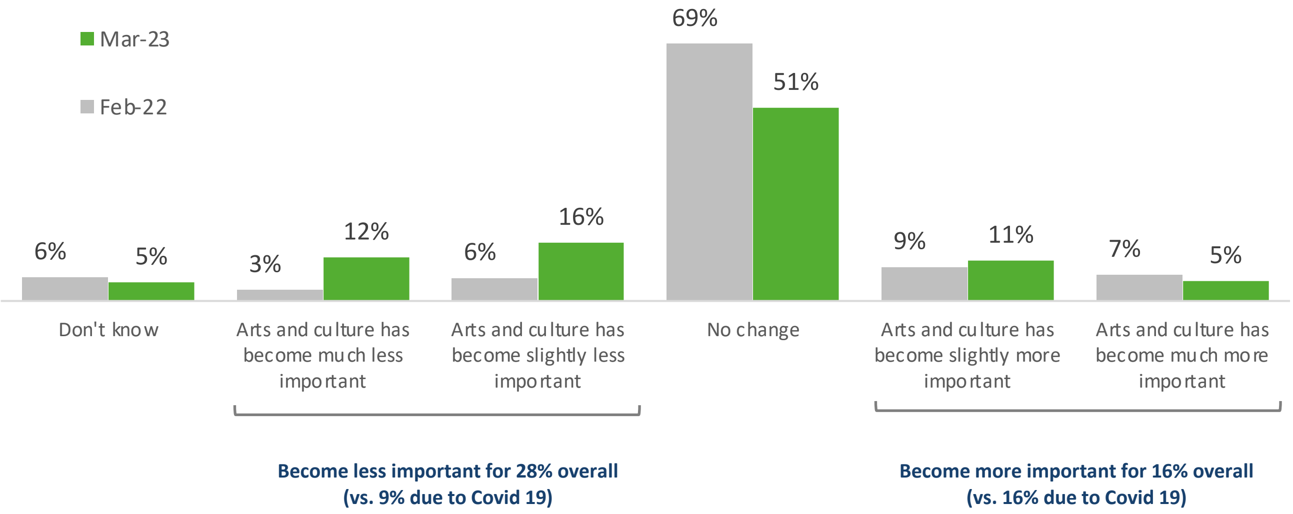


More specifically, with the rising cost of living are you any more or less likely to attend the following cultural events and places than you before the cost of living crisis?

Arts and cultural activities have decreased in importance for over a quarter due to rising cost of living concerns

- Respondents were asked to what extent, if any arts and cultural activities had become more or less important to them given rising costs.
- While 51% stated that they importance had not changed, 16% felt that they had become more important but 28% felt that that they had become less important.
- Groups more likely to state that arts and cultural activities have become more important included those aged 16 to 34 (25%), people with children at home (22%), members of the BAME population (32%) and those who are financially comfortable (22%).
- However 31% of C2DEs and 33% of those who are struggling with finances stated that arts had become less important.

Figure 1 – Changing importance of arts and cultural activities due to rising costs of living in March 2023 vs due to Covid 19 in February 2022

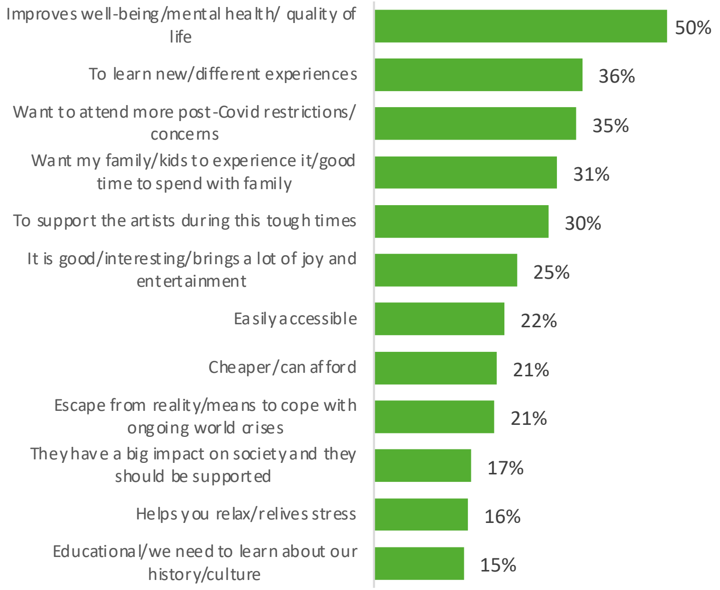


March 2023: To what extent, if any, has the importance of the arts and cultural activities you do or watch and the venues and events you go to changed for you because of the rising costs
February 2022: To what extent, if any, has the importance of the arts and cultural activities you do or watch and the venues and events you go to changed for you because of the Covid-19 pandemic?

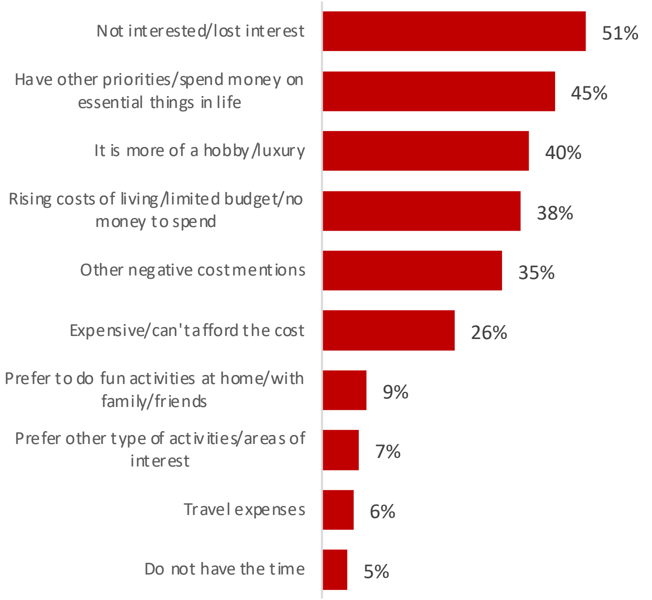
While arts and culture are less important for some because they feel they now have other priorities, they are more important for others as they improve their well-being and quality of life

- An open ended question asked respondents to give more details on whey arts and cultural activities had become more or less important given rising costs of living. The most common responses are shown on the right.
- The most common reasons for arts and culture becoming more important were to help with well-being and mental health, learning and trying new experiences and a desired to do more post-Covid.
- In contrast the most common reasons for arts and culture becoming less important were a loss of interest and having more important priorities.
- A selection of the comments provided are included on the next page.

Why arts and cultural activities have become more important because of the rising costs of living... (16% of population)



Why arts and cultural activities have become less important because of rising costs of living... (28% of population)



While arts and culture are less important for some because they feel they now have other priorities, they are more important for others as they improve their well-being and quality of life

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Why arts and cultural activities have become more important because of the rising costs of living… (16% of population)

"With slightly more limited funds, as a family we are more likely to spend money on arts and cultural events, rather than eating out or other non cultural activities."

"You need to have something to look forward to."

"Life would be boring without art and culture."

"It gives you something to look forward to at the end of the month."

"I want to enjoy myself more now post lockdown."

"It is such a vital roll in making me and my family happy it's just a lot harder to access now."

"Quite a lot off the time they are free and if there is a charge it's minimal, so that helps a great deal."

Why arts and cultural activities have become less important because of rising costs of living… (28% of population)

"I cannot afford to attend these events because of the cost of living and so I have lost interest."

"Food and heating and paying the bills are a lot more of a priority just now."

"There are now live music concerts that are no longer value for money because of the high ticket prices."

"As much as I enjoy them, I feel as though it is more important to prioritise other things now such as foods costs, bills etc."

"I have opportunities to do free things at home that have the same impact on my life rather than expensive events out and about."

"I can listen to lots of musical performances on the radio, it isn't quite the same as being live, but it's the next best thing until I can afford to attend live performances again."

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