

Cumbria & Lancaster

Place Based Insights

Oliver Mantell, Director of Evidence & Insight

Supported by:



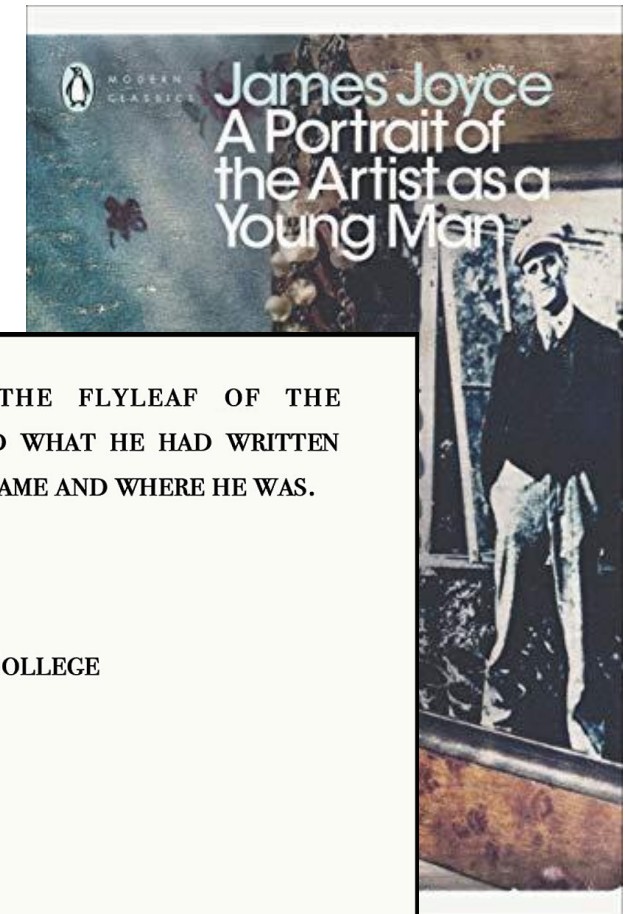
Format of the session

- About the **local area** and population
- About **local audiences**
- **Discussion** re findings and own knowledge
- **Summary** and implications



Types and Levels of Information

- **National:** Cultural Participation Monitor
- **Regional:** Audience Spectrum
- **Subregional:** Cultural Participation Monitor; Audience Finder (ticketing and surveys); Audience Spectrum
- **LA:** Area Profile Reports; TGI
- **Ward:** Audience Finder Ticketing; Area Profile Report+; Audience Spectrum



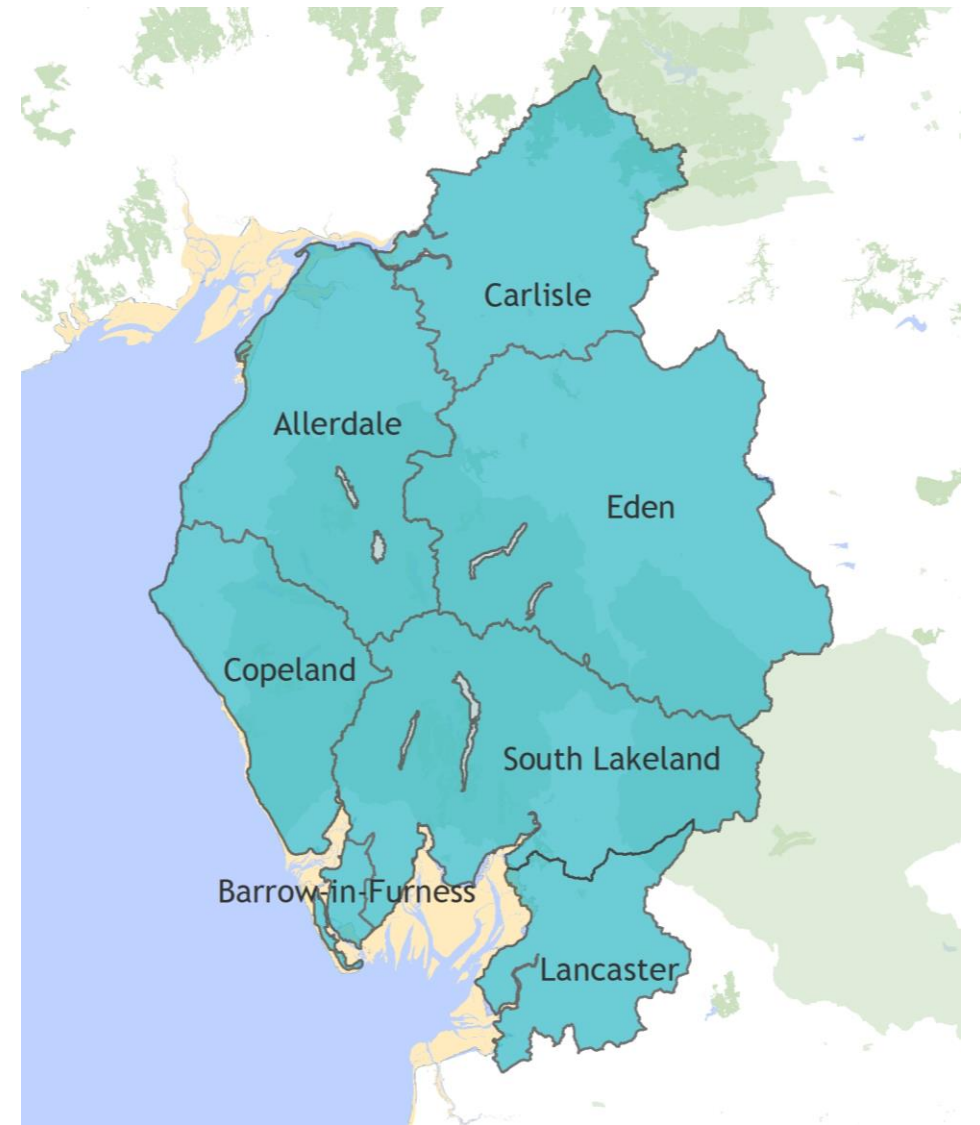
“HE TURNED TO THE FLYLEAF OF THE GEOGRAPHY AND READ WHAT HE HAD WRITTEN THERE: HIMSELF, HIS NAME AND WHERE HE WAS.

STEPHEN DEDALUS
CLASS OF ELEMENTS
CLONGOWES WOOD COLLEGE
SALLINS
COUNTY KILDARE
IRELAND
EUROPE
THE WORLD
THE UNIVERSE”

Local Population

Local Area and Population

- Overview of demographics
- Audience Spectrum, inc. map(s) of 'dominant' segment
- Top lines from Cultural Participation Monitor



Local Area and Population

- **Demographics:** cf. North West overall, an older population with fewer families (38% have children under 18 cf. 44% in the North West) and is less ethnically diverse (98% are white cf. 90%). It has a higher proportion of retirees among economically inactive (56% cf. 46%); among the employed, skilled trades are more prevalent (15% cf. 10%). 560k cf. 6.1M.
- **Audience Spectrum:** Higher for Home & Heritage, Up Our Street and Heydays; lower for Commuterland Culturebuffs and Facebook Families.
- **Arts Engagement (TGI):** Attendance levels are similar but slightly lower than in the North West overall, with theatre, plays, popular/rock concerts, comedy shows and art galleries the most popular arts activities.

Allerdale

- **Demographics:** Least diverse with lowest proportion of ethnic minorities, most popular occupation is skilled trades (17%), a quarter have no qualifications (27%)
- **Audience Spectrum:** High: Up Our Street, Facebook Families, Home & Heritage; Low: Commuterland Culturebuffs, Experience Seekers.
- **Arts Engagement (TGI):** Lower attendance across artforms, with slightly higher attendance for Keswick, Boltons, Crummock, Dalton and Derwent Valley.

Eden

- **Demographics:** High employment levels among economically active and highest for self-employed without employees (12%), highest proportion of skilled traders, fewer families (35%)
- **Audience Spectrum:** High: Dormitory Dependables, Home & Heritage; Low: Experience Seekers, Kaleidoscope Creativity.
- **Arts Engagement (TGI):** Medium attendance across artforms with higher attendance for Dacre, Greystroke, Hartside, Hesket and Penrith North.

South Lakeland

- **Demographics:** Older, fewest families (33%), highest employment among economically active (94%) with highest proportion of managers/senior positions and of skilled trader, highest proportion of economically inactive are retired (69%).
- **Audience Spectrum:** High: Home & Heritage, Domiciliary Dependables, Commuterland Culturebuffs; Low: Heydays Experience Seekers, Facebook Families.
- **Arts Engagement (TGI):** High attendance, particularly for art galleries, classical music and theatre. Attendance was particularly high for Bowness & Levens, Furness Peninsula, Kendal and Windermere

Copeland

- **Demographics:** Highest levels of full-time employment among economically active (58%) but low levels of self-employment, a quarter have no qualifications (27%), relatively high proportion of process, plant and machine operatives (11%)
- **Audience Spectrum:** High: Up Our Street, Facebook Families, Heydays; Low: Commuterland Culturebuffs, Experience Seekers.
- **Arts Engagement (TGI):** Lowest attendance of all regions across artforms, with slightly higher attendance for St Bees, and Bransty and Hillcrest (theatre and popular/rock concerts).

Lancaster

- **Demographics:** Highest proportion of population (22%), most ethnically diverse, highest percentage of students (8%) and of professional occupations, 40% are families.
- **Audience Spectrum:** High: Trips & Treats, Dormitory Dependables, Experience Seekers; Low: Kaleidoscope Creativity, Heydays.
- **Arts Engagement (TGI):** High attendance, particularly for art galleries, comedy shows, ballet, pop/rock concert, theatre and museums. Attendance was particularly high for Castle and University & Scotforth.

Barrow-in-Furness

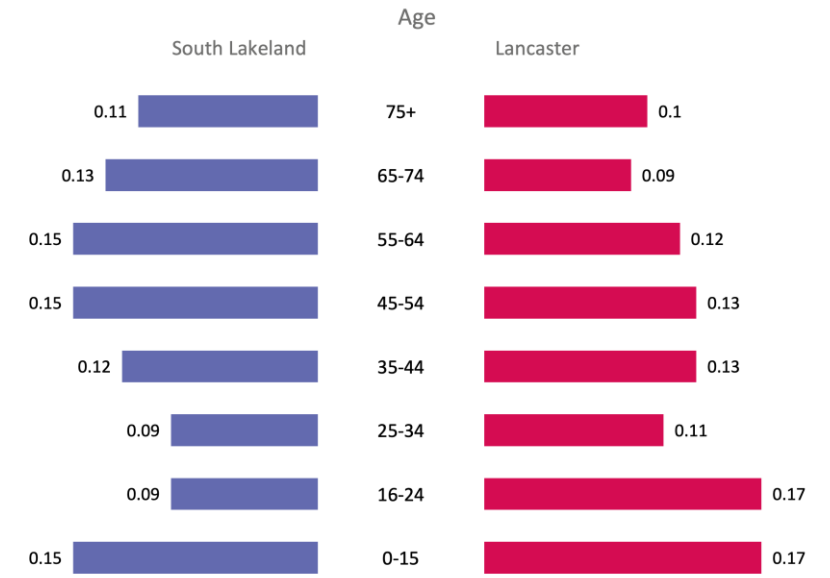
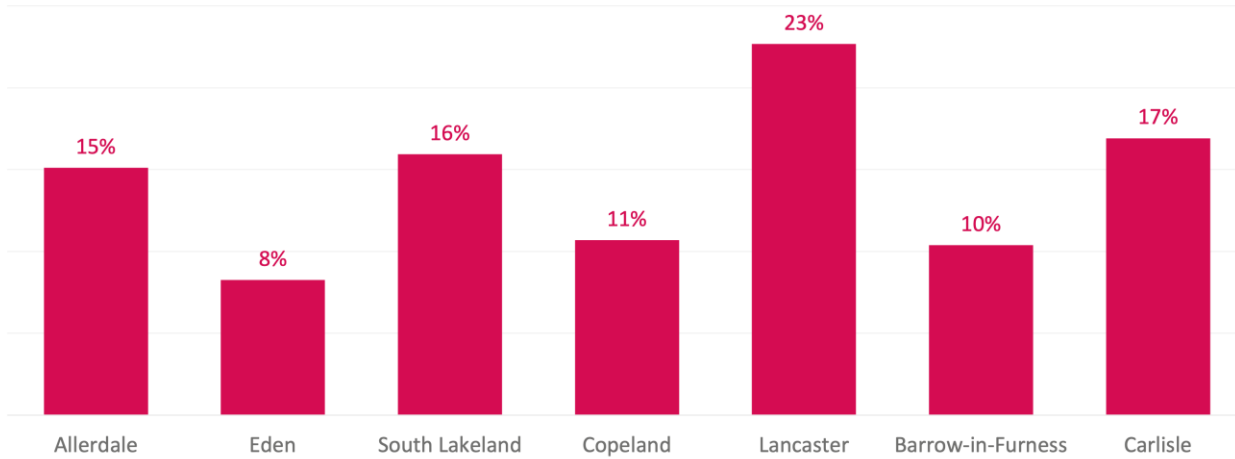
- **Demographics:** Highest unemployment among economically active (7%) and low levels of self-employed, skilled trades (16%) and professional occupations (15%) most prevalent, highest proportion of families (42%) and the region with the youngest families (16% with child under 5)
- **Audience Spectrum:** High: Up Our Street, Facebook Families; Low: Commuterland Culturebuffs, Kaleidoscope Creativity, Heydays.
- **Arts Engagement (TGI):** Lower attendance across all artforms, with slightly higher attendance for Newbarns and Roosecote (theatre and popular/rock concerts).

Carlisle

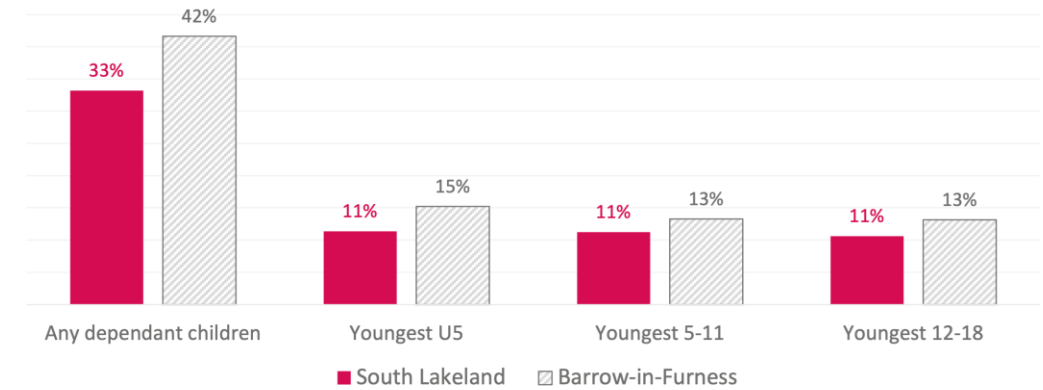
- **Demographics:** Skilled trades and elementary occupations are most prevalent (both 14%), highest proportion of process, plant and machine operatives (12%), 40% are families
- **Audience Spectrum:** High: Trips & Treats, Up Our Street, Facebook Families; Low: Commuterland Culturebuffs, Experience Seekers, Kaleidoscope Creativity.
- **Arts Engagement (TGI):** Lower attendance across all artforms, with slightly higher attendance for Dalston, Wetheral, Stanwix, Burgh and Great Corby and Geltsdale.

Example Comparisons

Population estimate by Local Authority

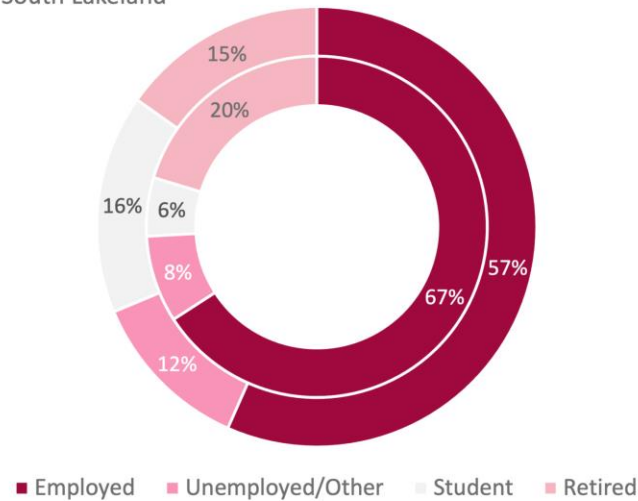


Barrow-in-Furness is the Local Authority with the most families

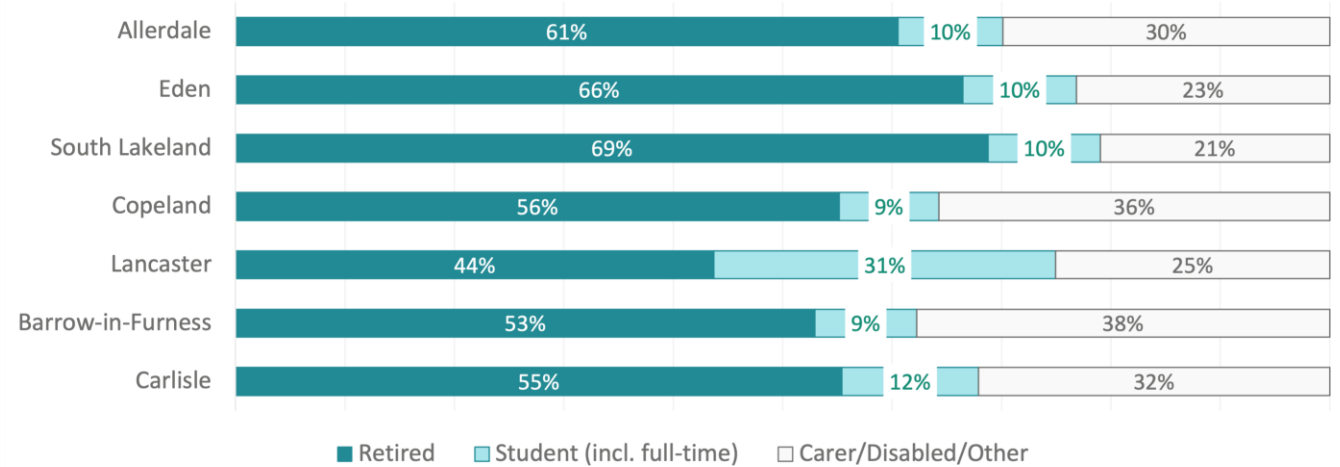


Example Comparisons

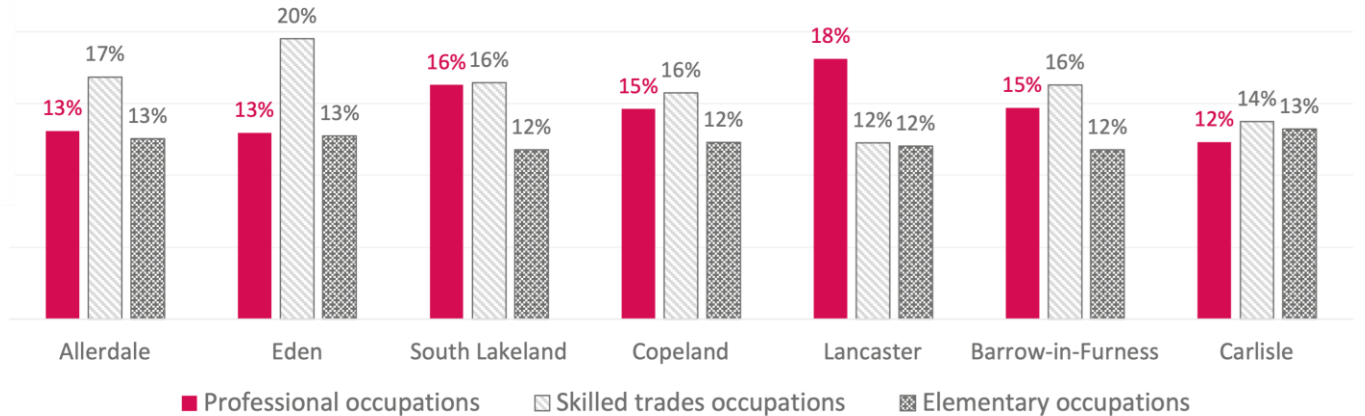
Outside ring: Lancaster
Inside ring: South Lakeland



Among the economically inactive population, South Lakeland and Eden have the highest proportion of retirees while Lancaster has the most students



The three most prevalent occupations are professional, skilled trades and elementary



 audience
spectrum

Population
segmentation using
multiple data sources
based specifically on
arts and cultural
interests



Data Sources

5 key data sources



Taking Part - National depth survey

Cultural Proximity - Convenience of offer

Experian Data Universe - wider consumer data

Population/Census - core demographics

Behavioural data: survey and ticketing



Example: Experience-Seekers Pen Portrait

Download

Experience Seekers statistical appendix

Engagement rank: 3

Population: 8% of English households

Arts attenders: tbc

Rating: Higher



Highly active, diverse, social and ambitious, engaging with arts on a regular basis

- Make up an important and significant part of urban arts audiences
- This group are highly active, diverse, social and ambitious singles and couples, regularly engaging with the arts on a regular basis
- Often students, recent graduates and in the early to mid-stages of their careers
- Tend to live close to city centres, so have easy access to and attend art galleries and heritage sites
- Interests cover mainstream, contemporary and culturally diverse activities, and are active in their social lives
- They are mostly in search of new things to do and have disposable income for leisure activities like sports/arts memberships, visits to cafes, bars and restaurants
- Typically digitally savvy, they will share experiences through social media

- Overview

Lifestage & location

A high proportion are singles and couples in their 20s and 30s across the country but 56% focused in the South.

Opportunity

Seeking new experiences to support and drive their lifestyle. Interested in both mainstream and alternative offers. Mostly digital natives, they like to 'share' and follow recommendations. They are likely to be influencers and are likely to form key influencers amongst their peers.

+ Interests

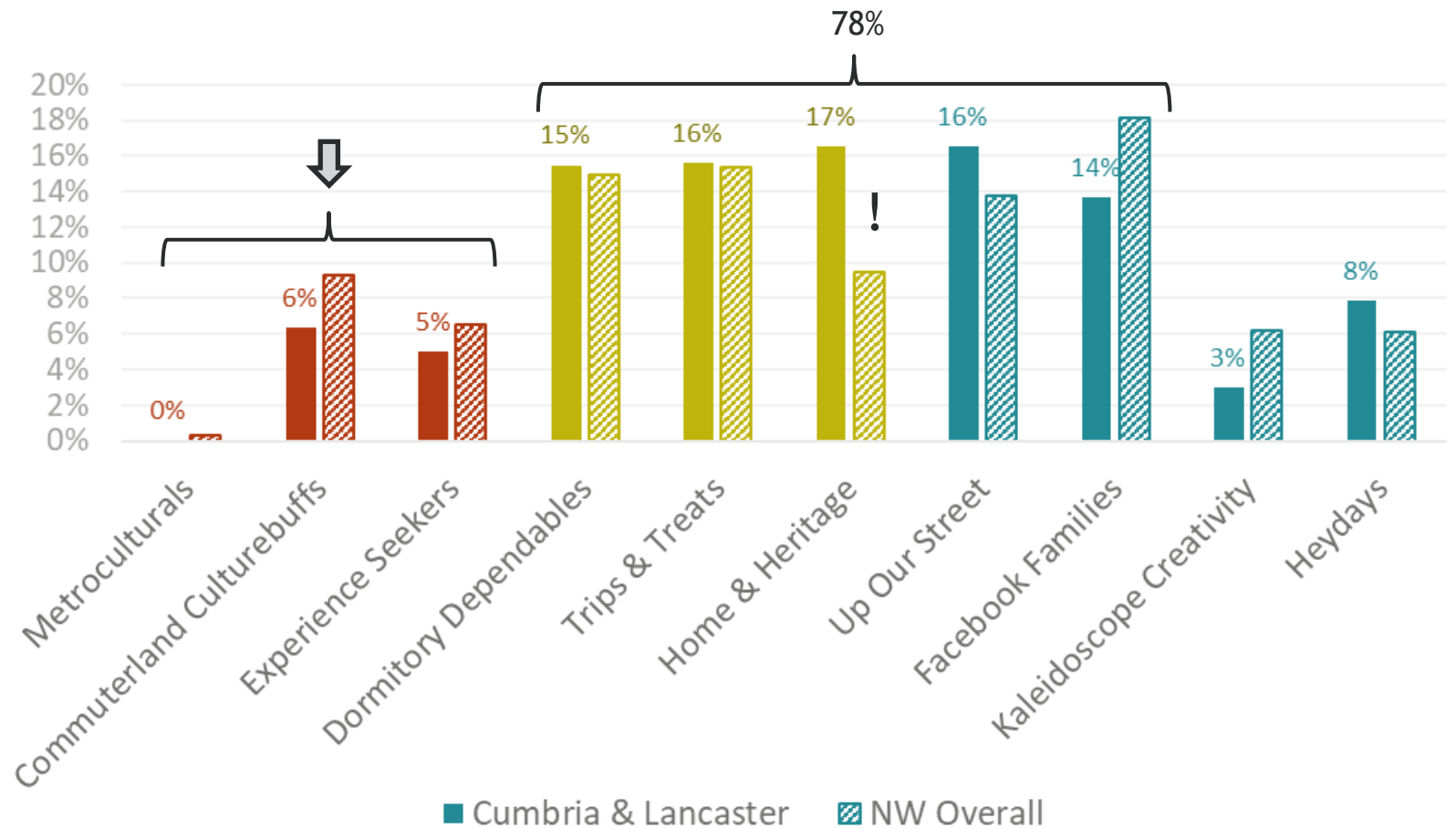
+ Location

+ Preferences

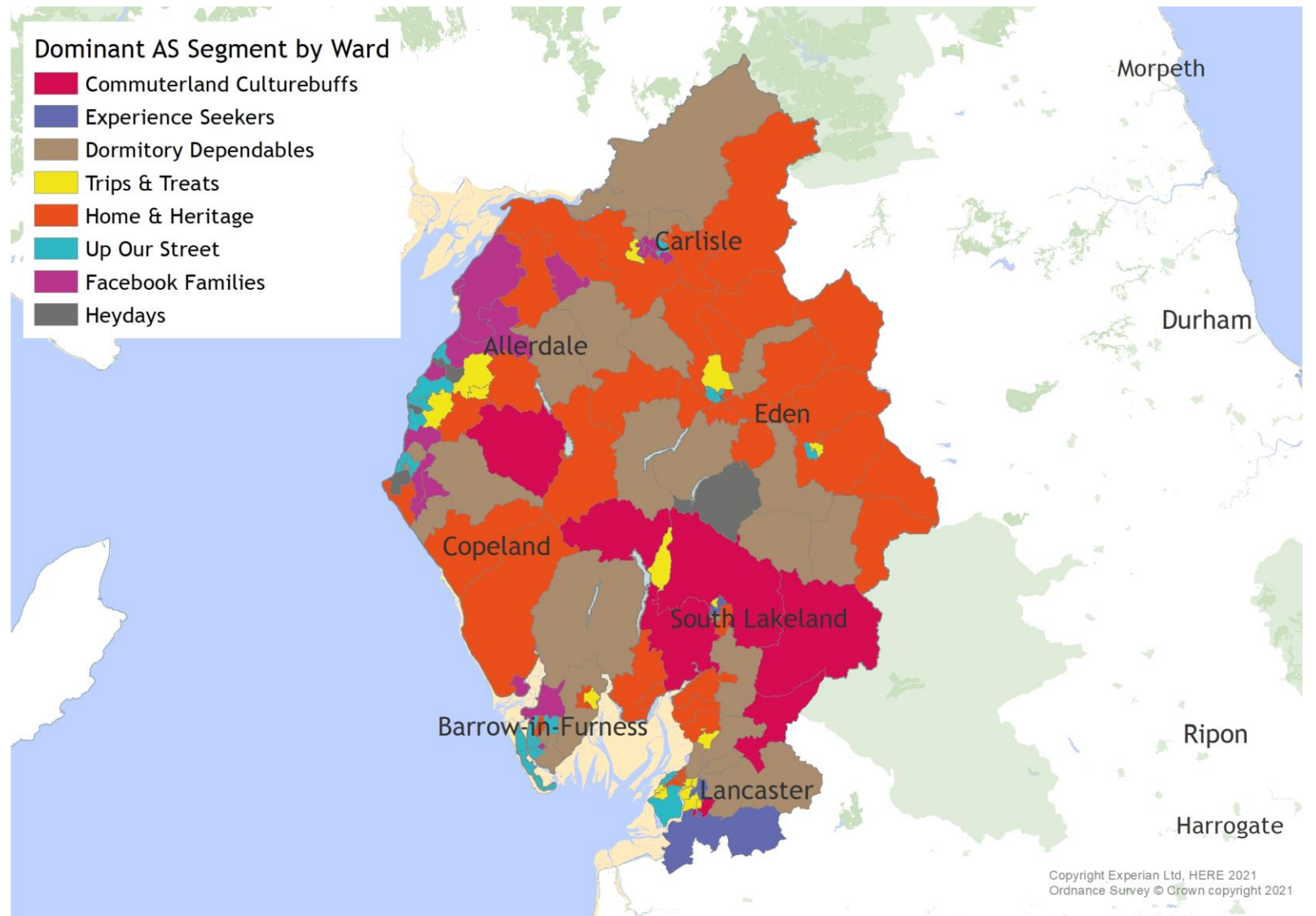
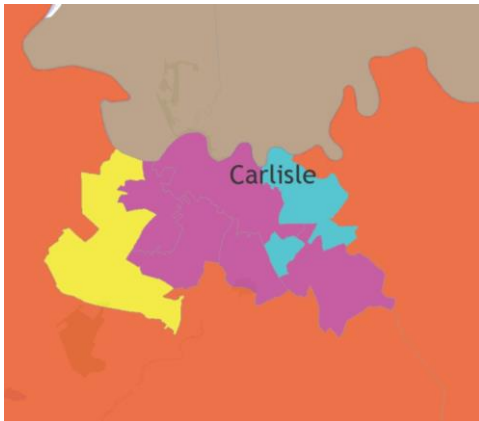
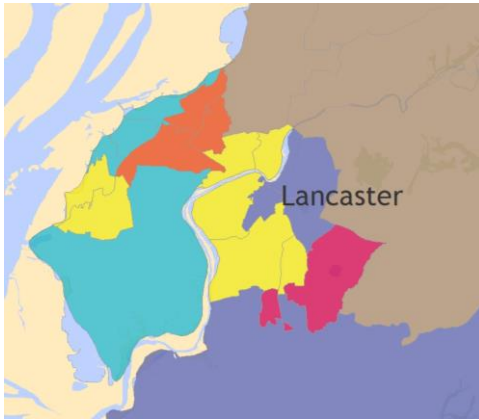
+ How to engage

Overall Audience Spectrum Profile

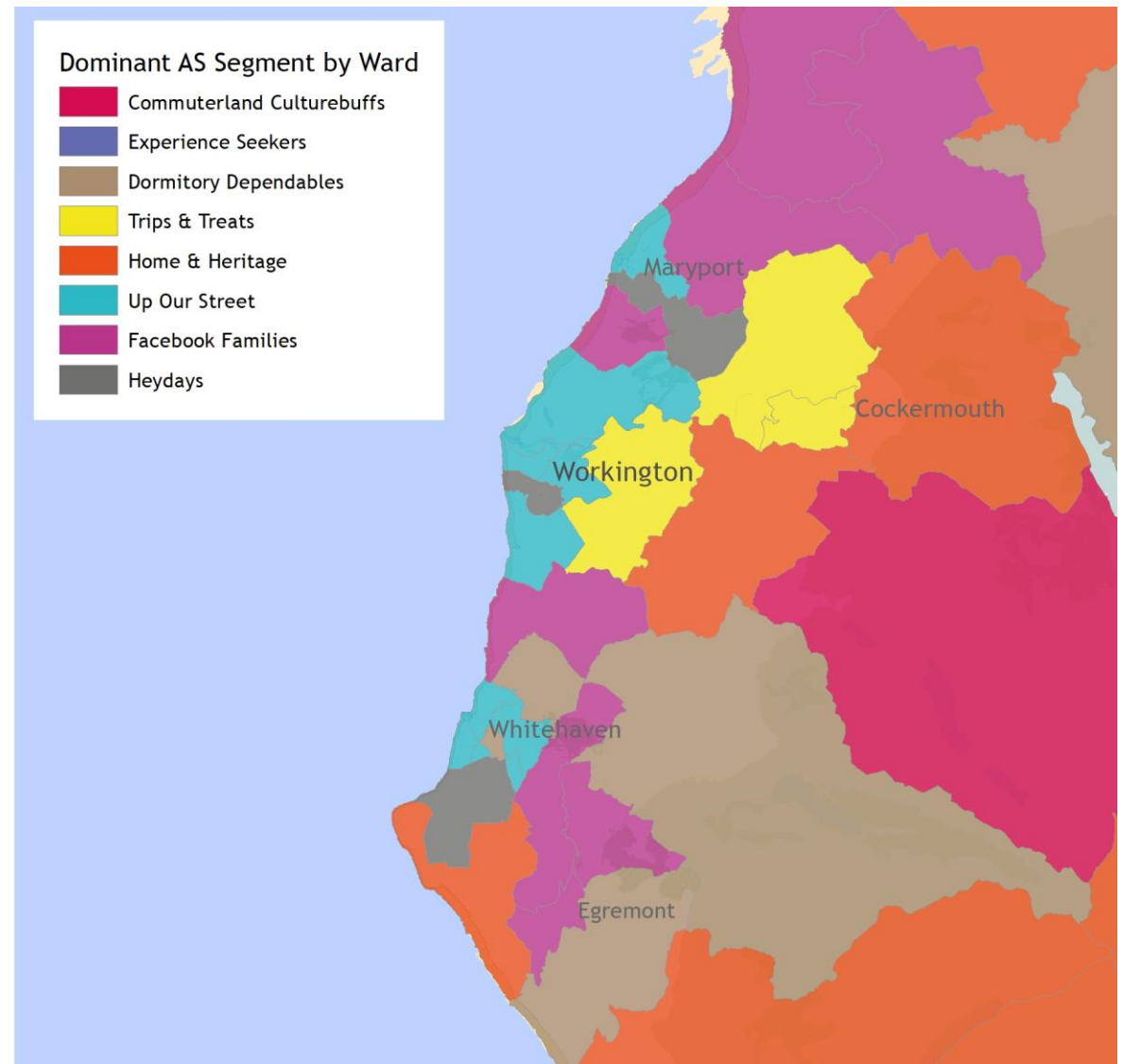
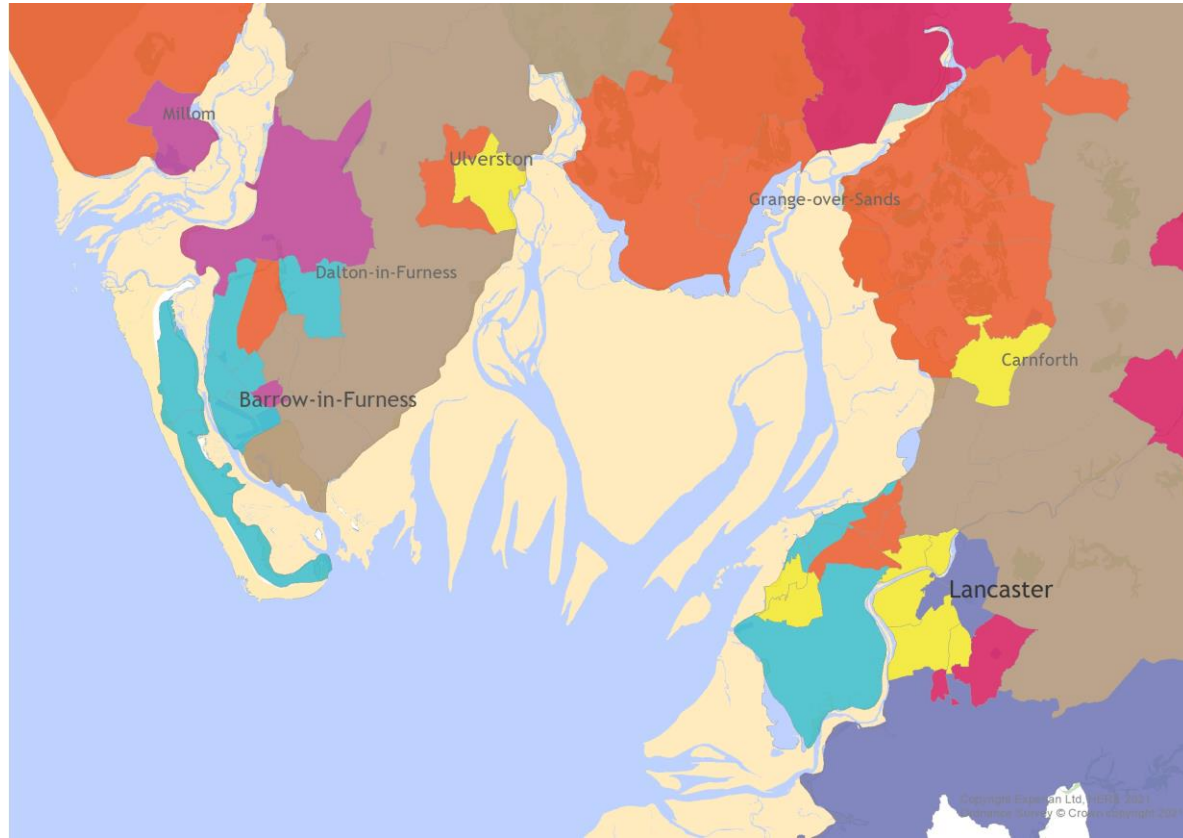
Local Audiences Skew Middle-Engaged cf. the North West Overall



Dominant Audience Spectrum by Ward

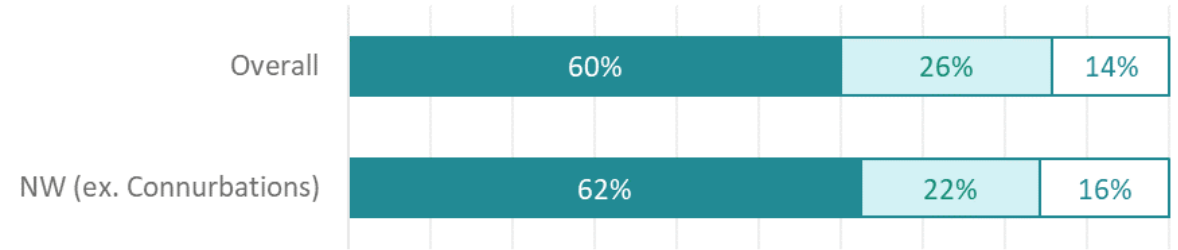


Dominant Audience Spectrum by Ward

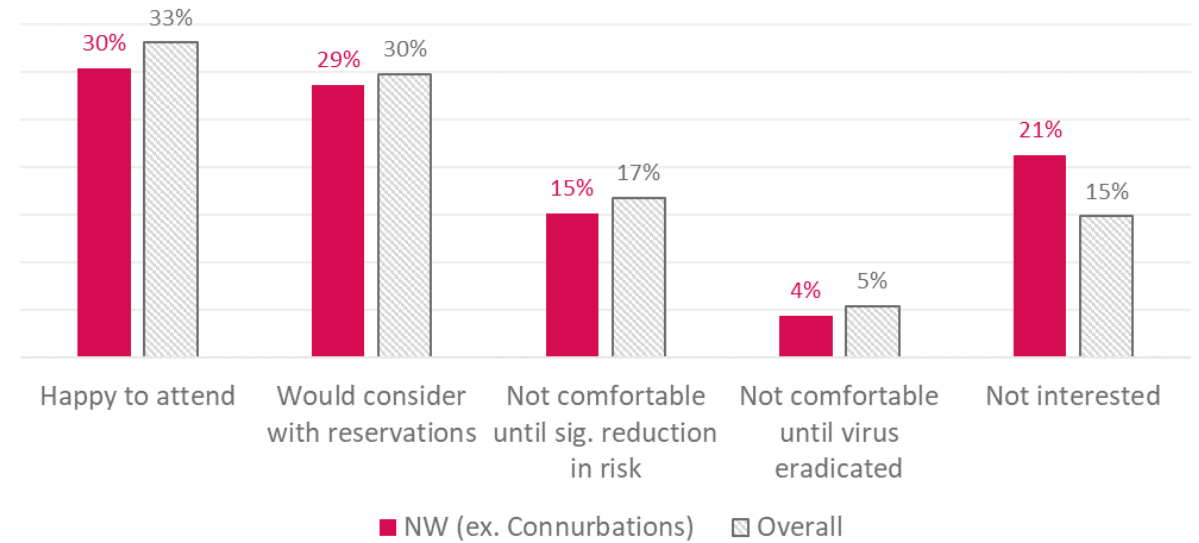


Top Lines from CPM

- Disability / had to shield: in line with national (+3% 'limited a little', -1% '...a lot'; +2% 'No', -1% 'Yes' / 'PNS').
- Attitudes to COVID overall
- Willingness to attend



- We should do everything we can to reduce it
- We should make some efforts to try to reduce it, but not go too far
- It's just something we have to accept and try to live normally



Local Audiences

About Local Audiences

- Audience Finder
 - Based on **10,662 surveys** (17/18-19/20) and **442,896 transactions** (16/17-19/20), across 404 (overall)/22 (local) and 431 (overall)/6 (local) orgs respectively:
 - Brewery Arts Centre
 - Carnegie Theatre
 - Lancaster Arts
 - The Dukes, Lancaster
 - The Forum Barrow
 - Theatre by the Lake
- Cultural Participation Monitor
 - **180 / 5,692 surveys**

	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	

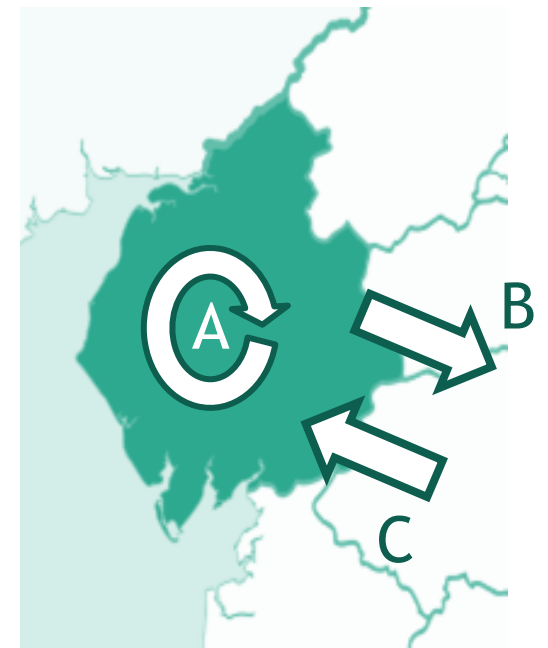


About Local Audiences

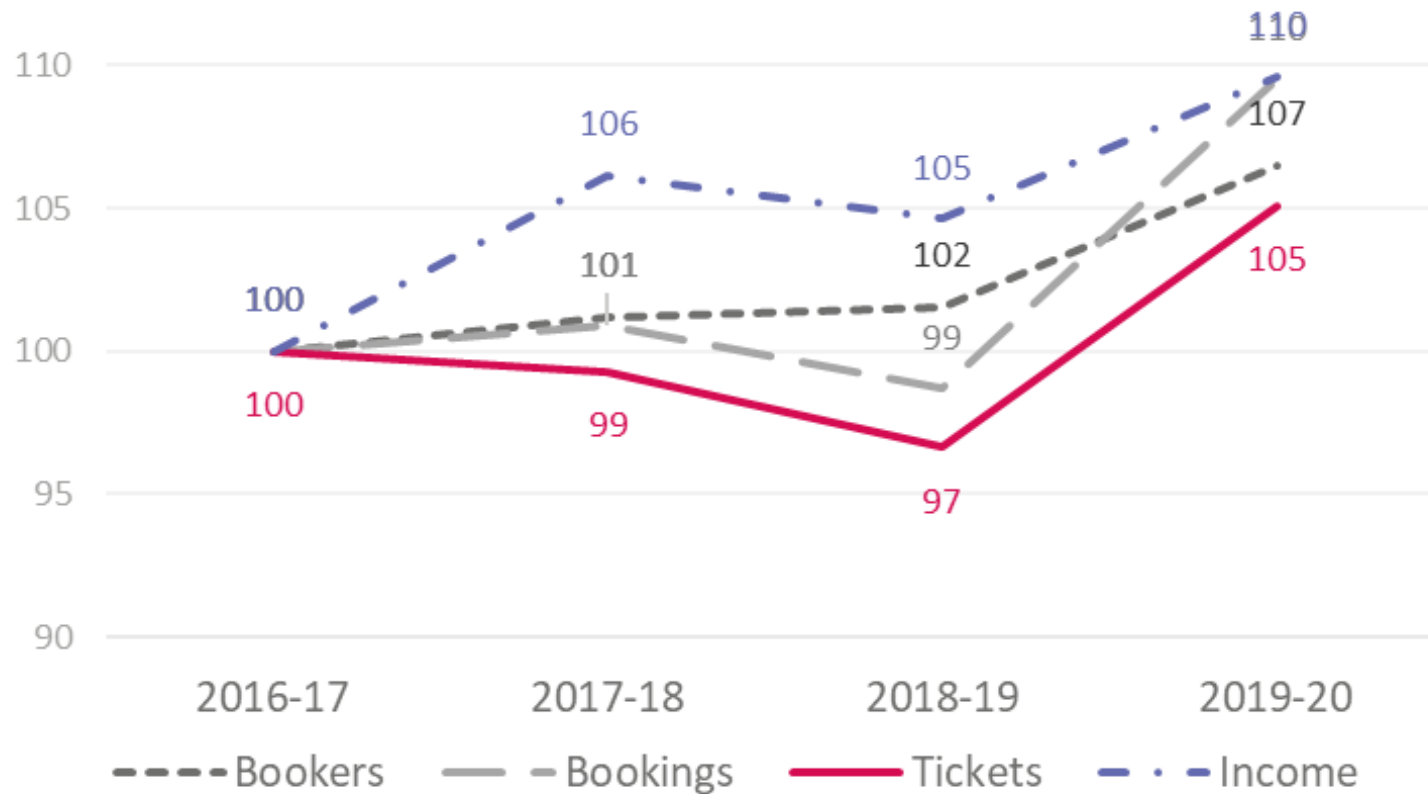
- Audience Finder ticketing

	16/17	19/20	Increase
Bookers	45k	48k	3k
Bookings	106k	116k	10k
Tickets	272k	285k	14k
Income	£4.4M	£4.8M	£0.4M

	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	



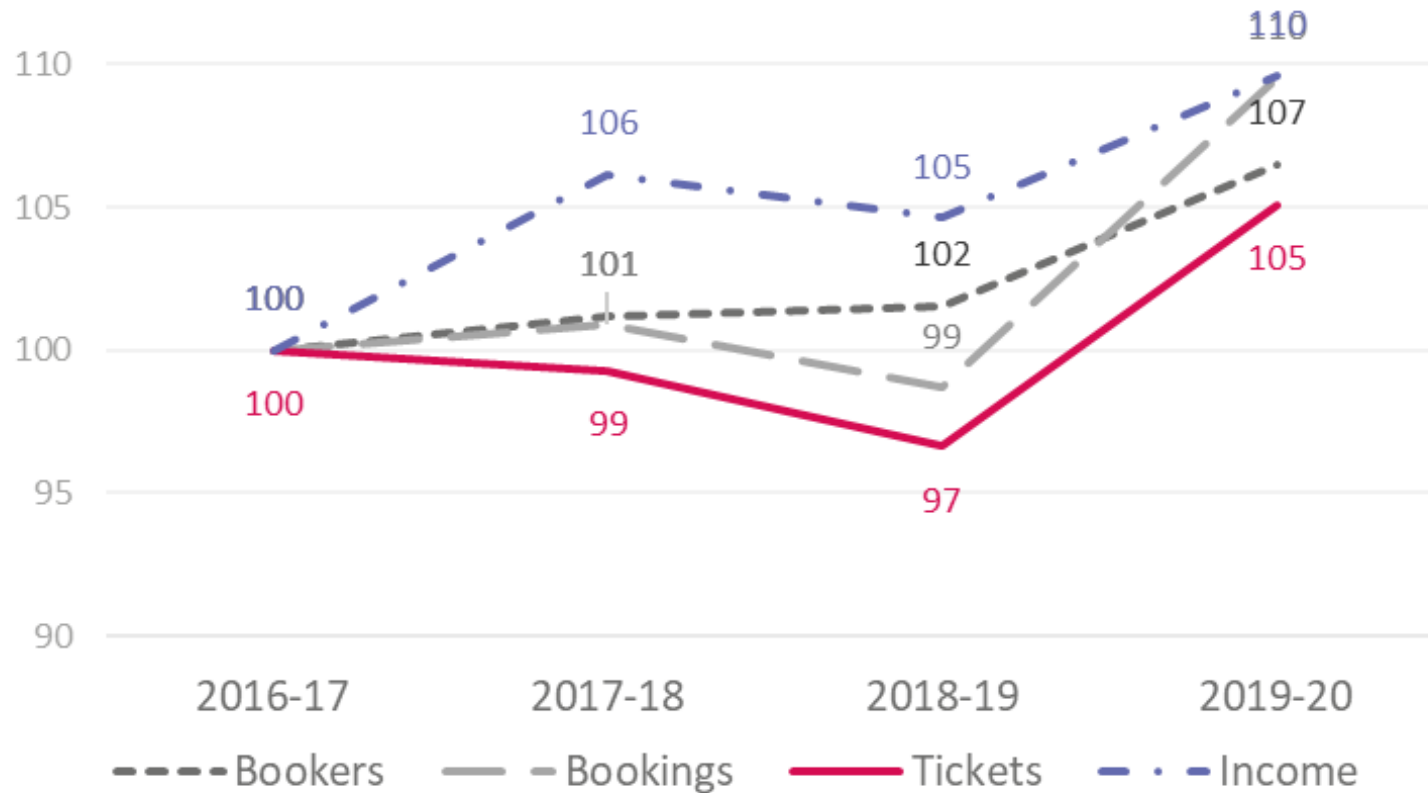
Sales Trends



Based on 6 ticketed venues.

All measures rose, but income and bookings rose further than bookers or tickets - i.e. there were more transactions per booker, for smaller numbers of higher value tickets.

Sales Trends



2019/20:

Avg. income/ticket: £16.86, +4%

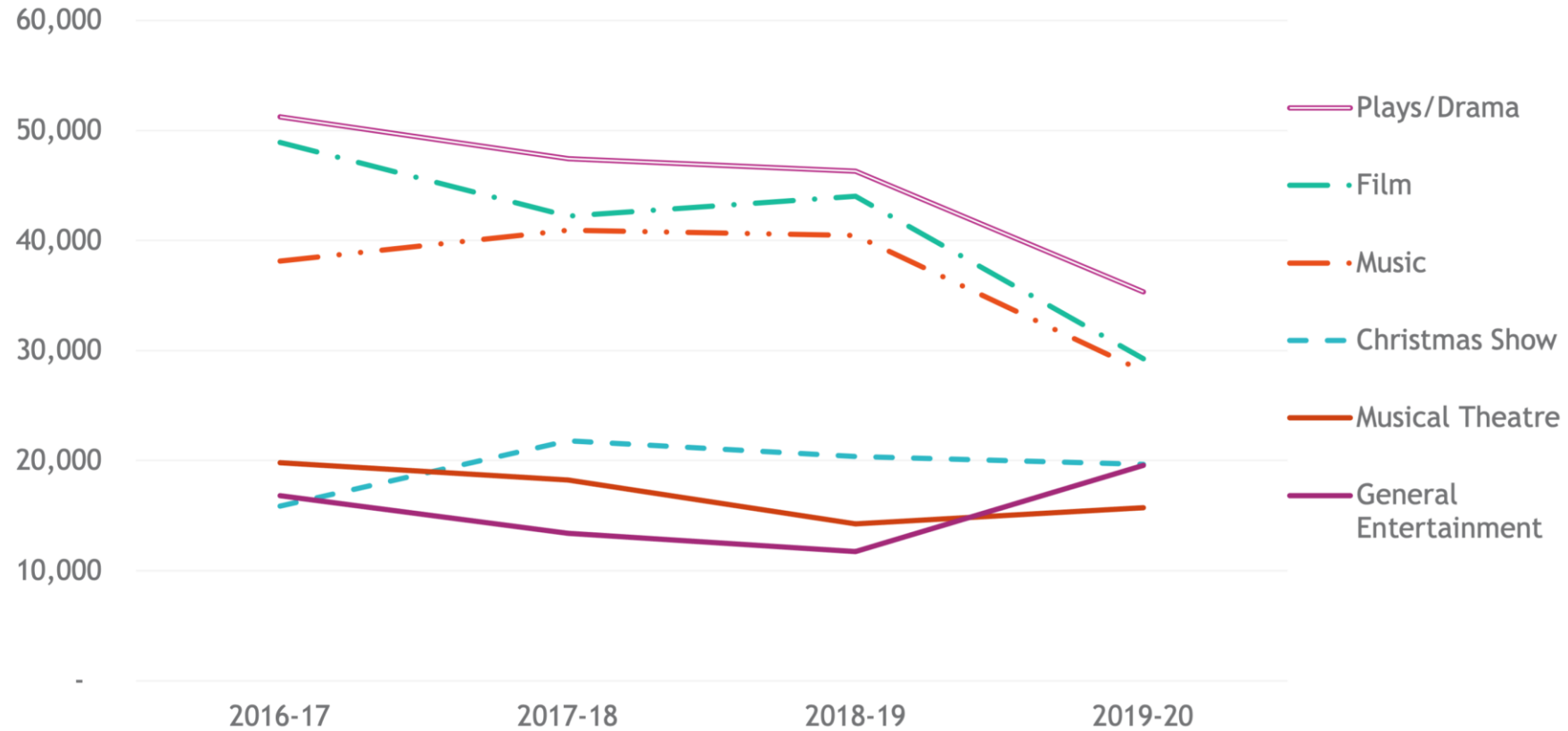
Avg. tickets/booker: 5.9, -1%

Avg. bookings/booker: 2.4, +3%

Avg. tickets/booking: 2.5, -4%

Audience Trends

Ticket sales by year for six most popular artforms

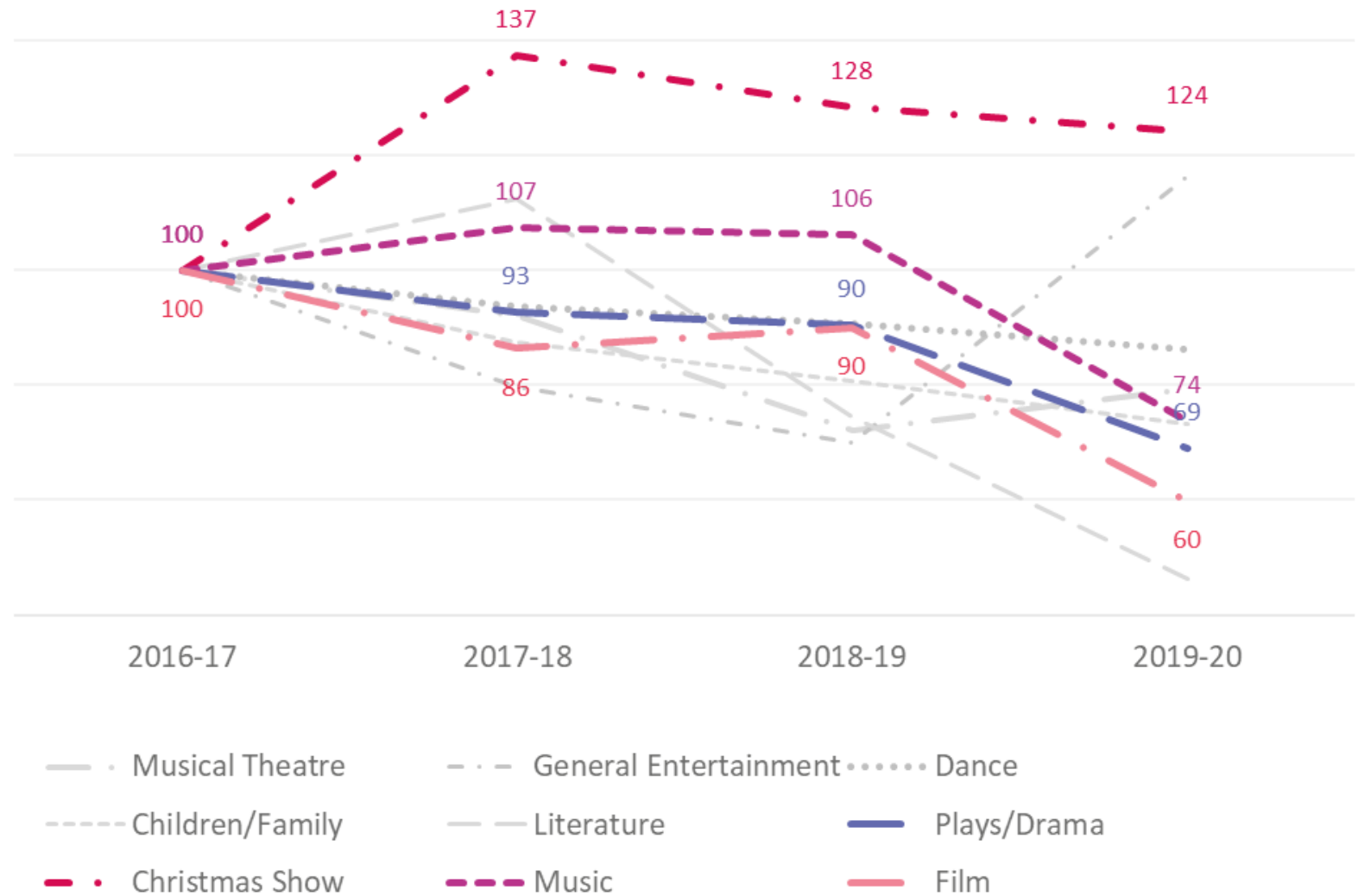


Sales Trends

Number of tickets per art form:

Only Christmas Shows and General Entertainment increased

Drops in Plays/Drama, Film & Music



About Local Audiences

Ticketing

A = 37.5K

B = 16.5K

C = 18.8K

Survey

A = 4,937

B = 2,745

C = 2,980

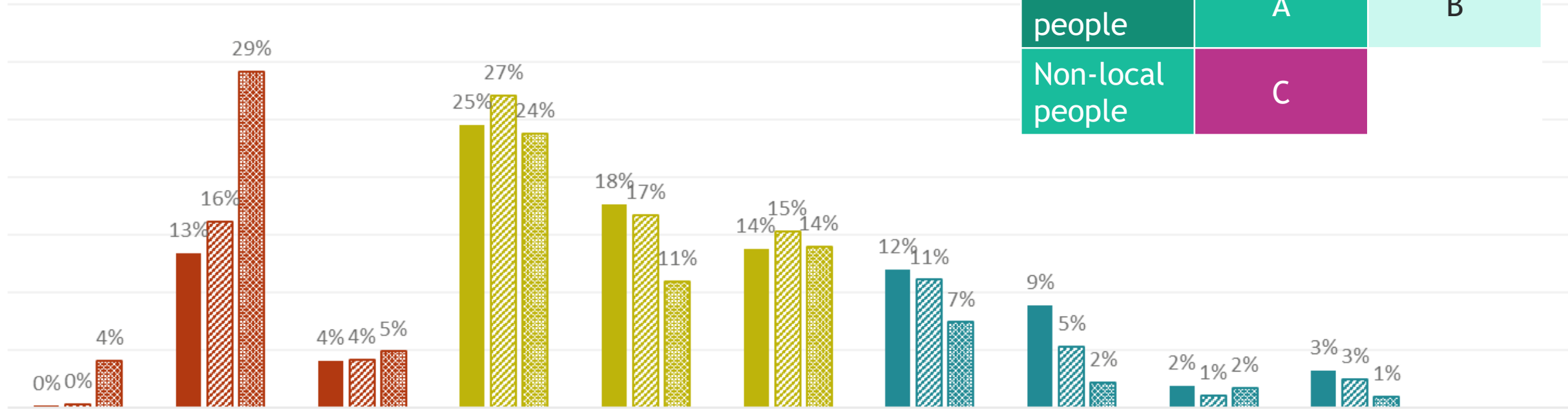
	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	



Cumbria & Lancaster are net importers of bookers/attenders, but not by a lot, and audiences are mostly local: c. 50% of local survey respondents travel 0-15 miles (and 48% of respondents at local orgs).

Local/Non-Local Audiences (Ticketing)

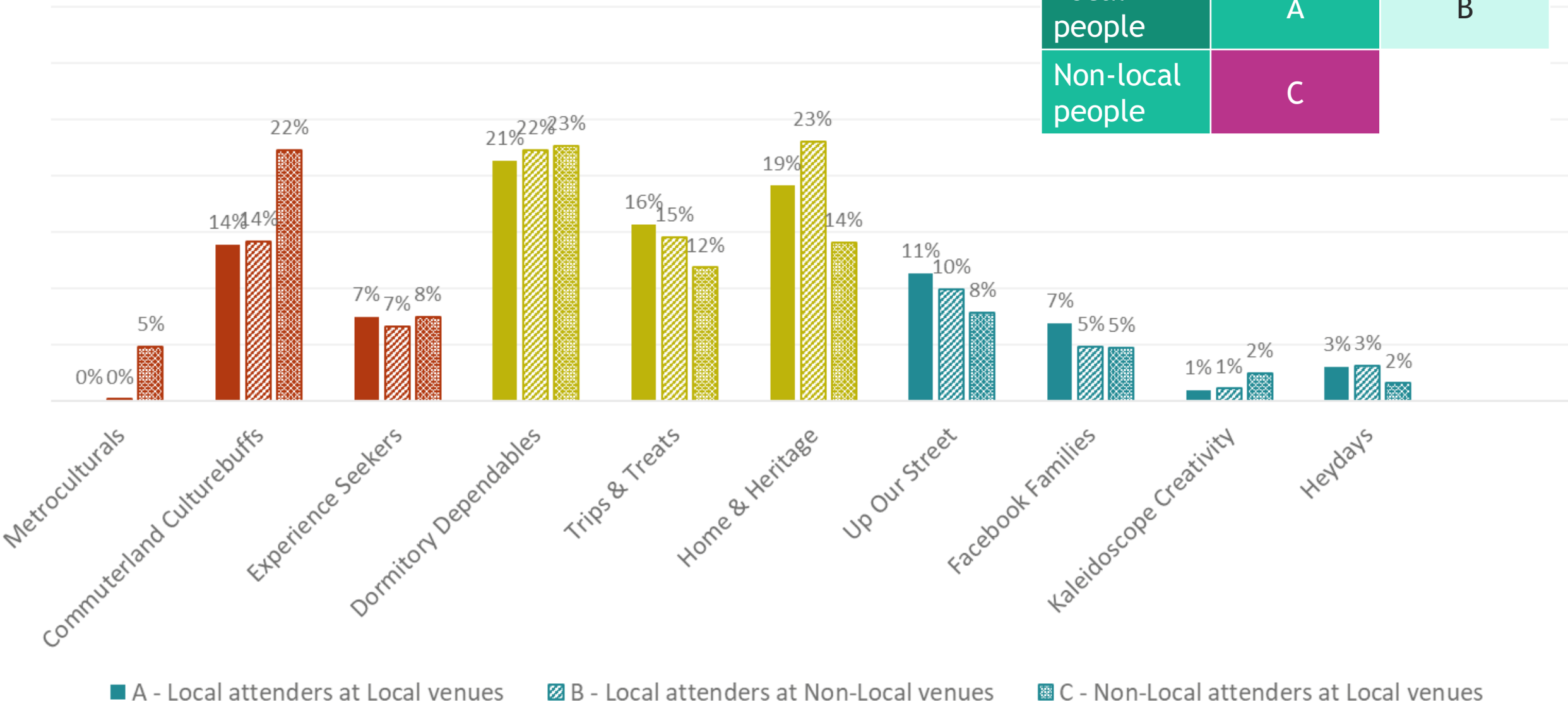
	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	



■ A - Local bookers to Local venues
 ▨ B - Local bookers to Non-Local venues
 ▩ C - Non-Local bookers to Local venues

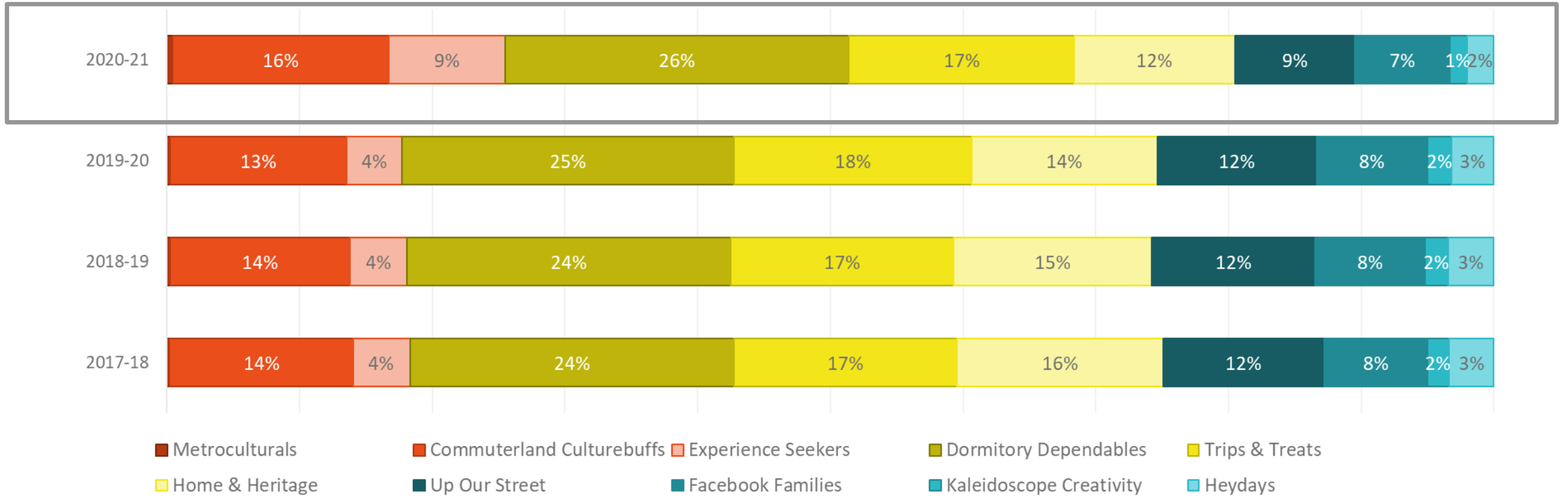
Local/Non-Local Audiences (Survey)

	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	



Audience Trends

The proportion of higher engaged audiences attending has increased since the pandemic

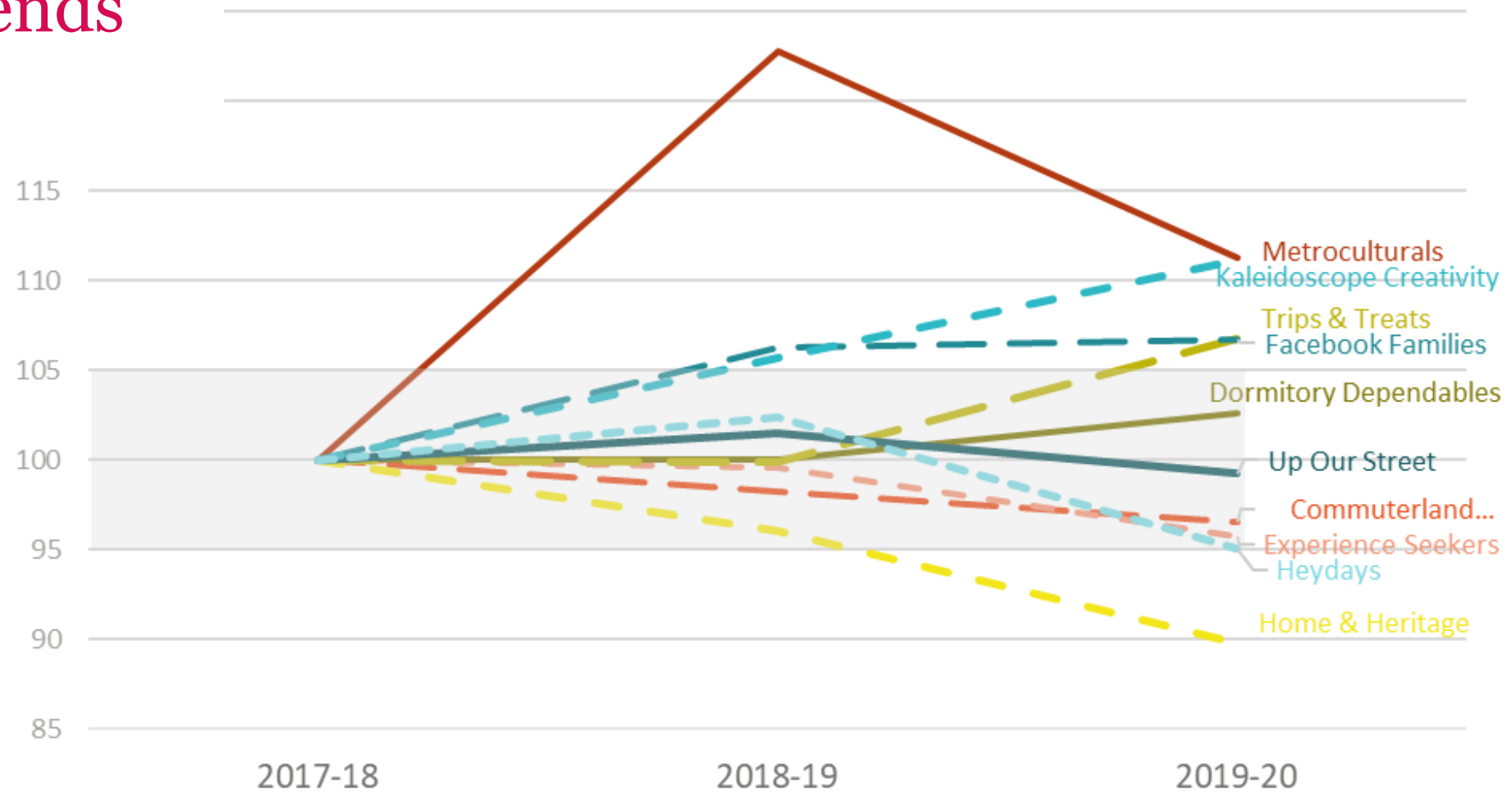


Audience Trends

Family/Urban(?)



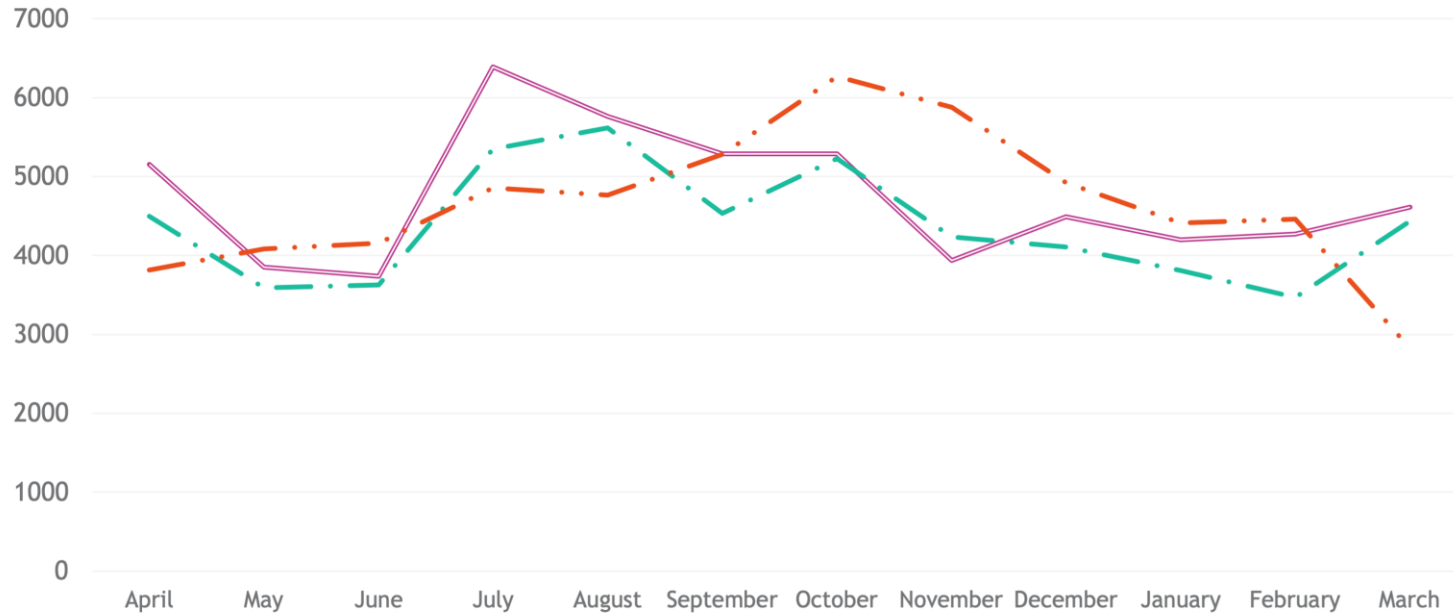
Older/Higher-engaged (?)



Non-Local Audiences

	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	

Non-local bookers to local venues throughout the year



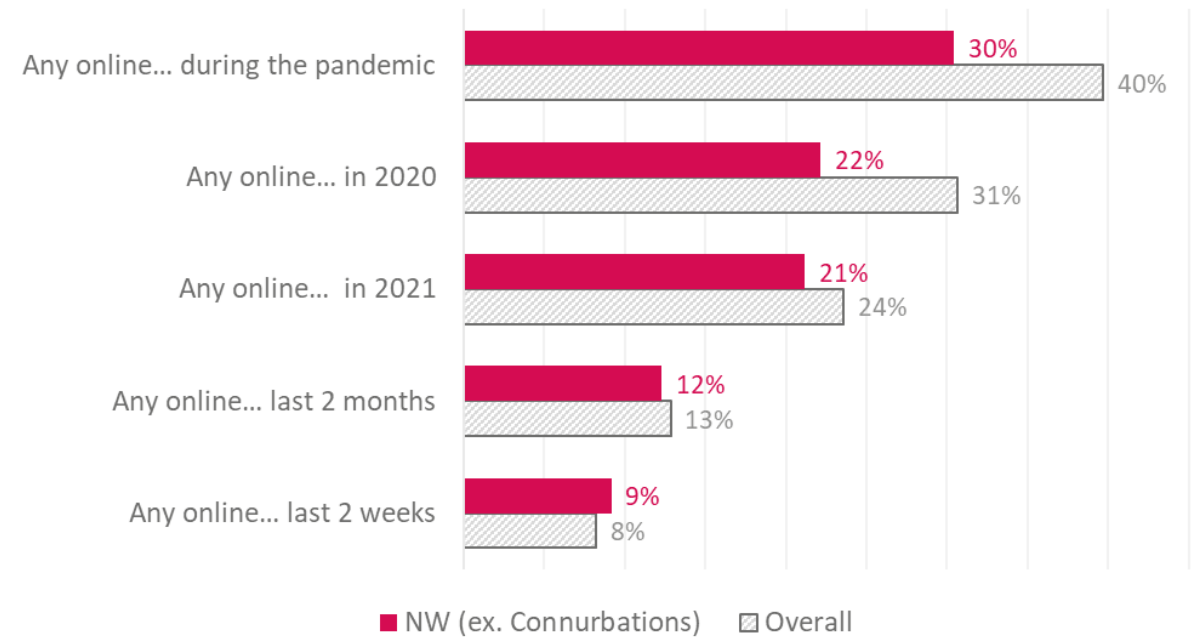
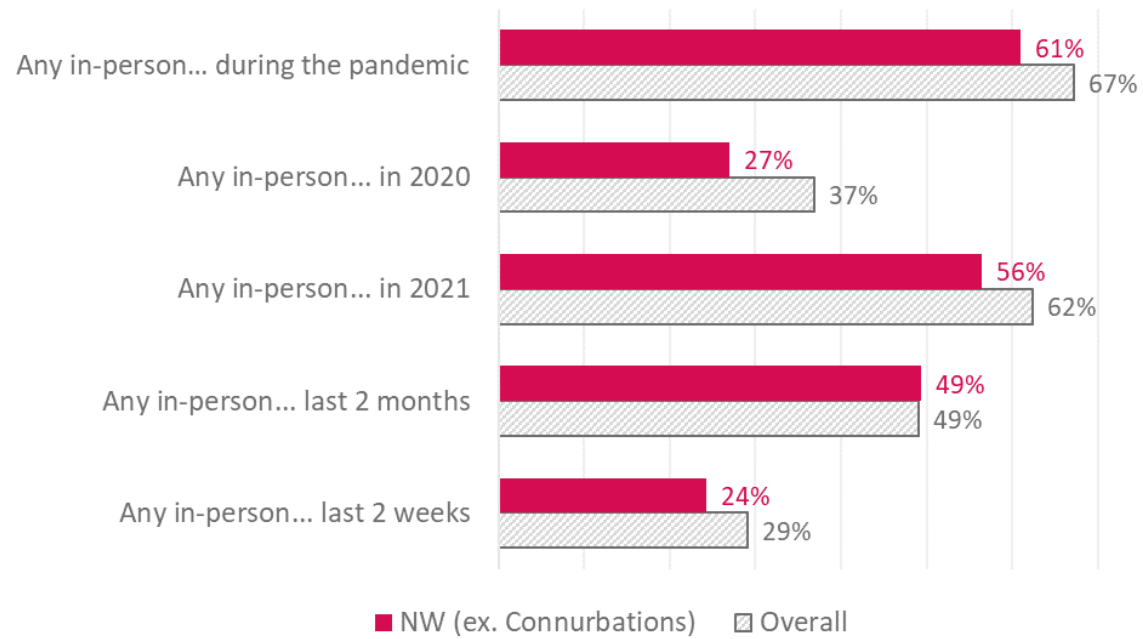
— 2017-18

— 2018-19

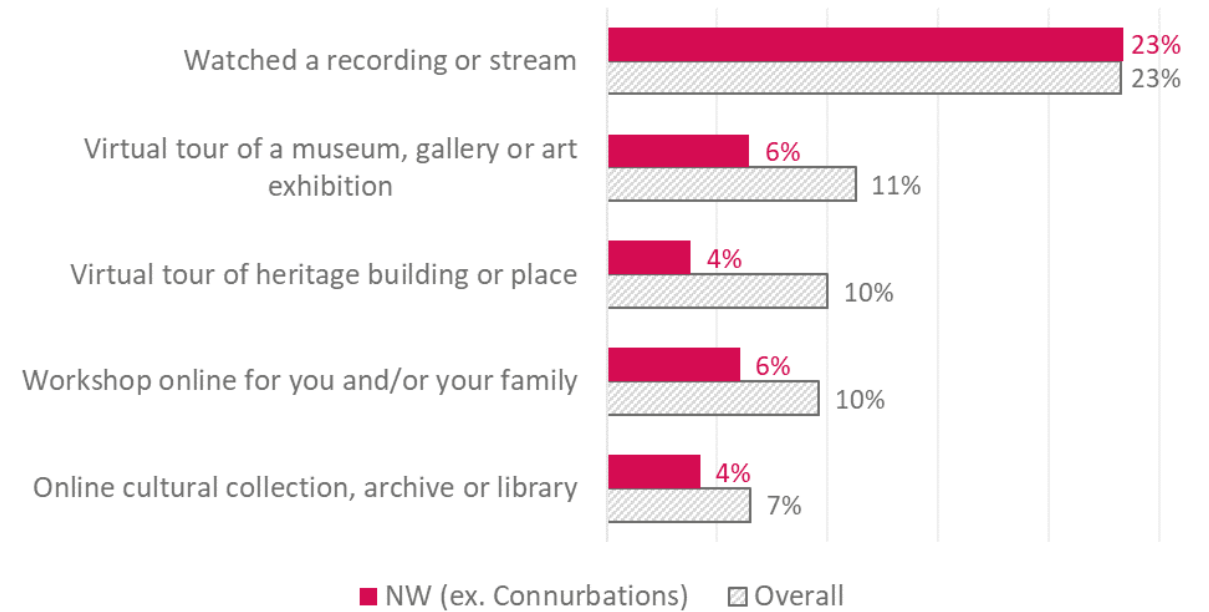
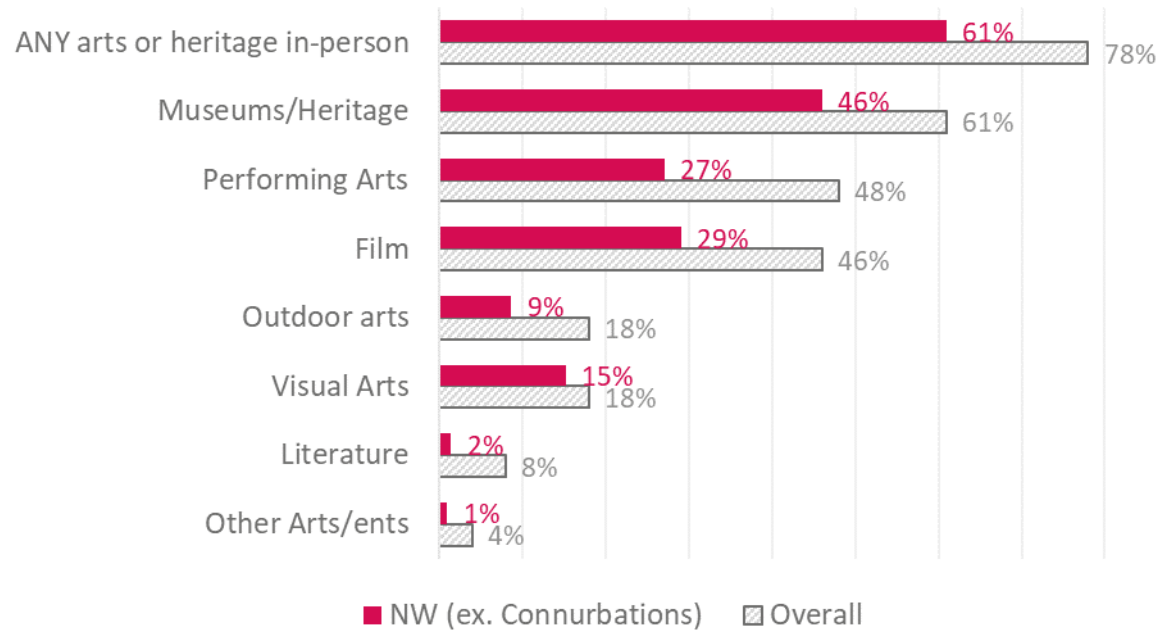
— 2019-20



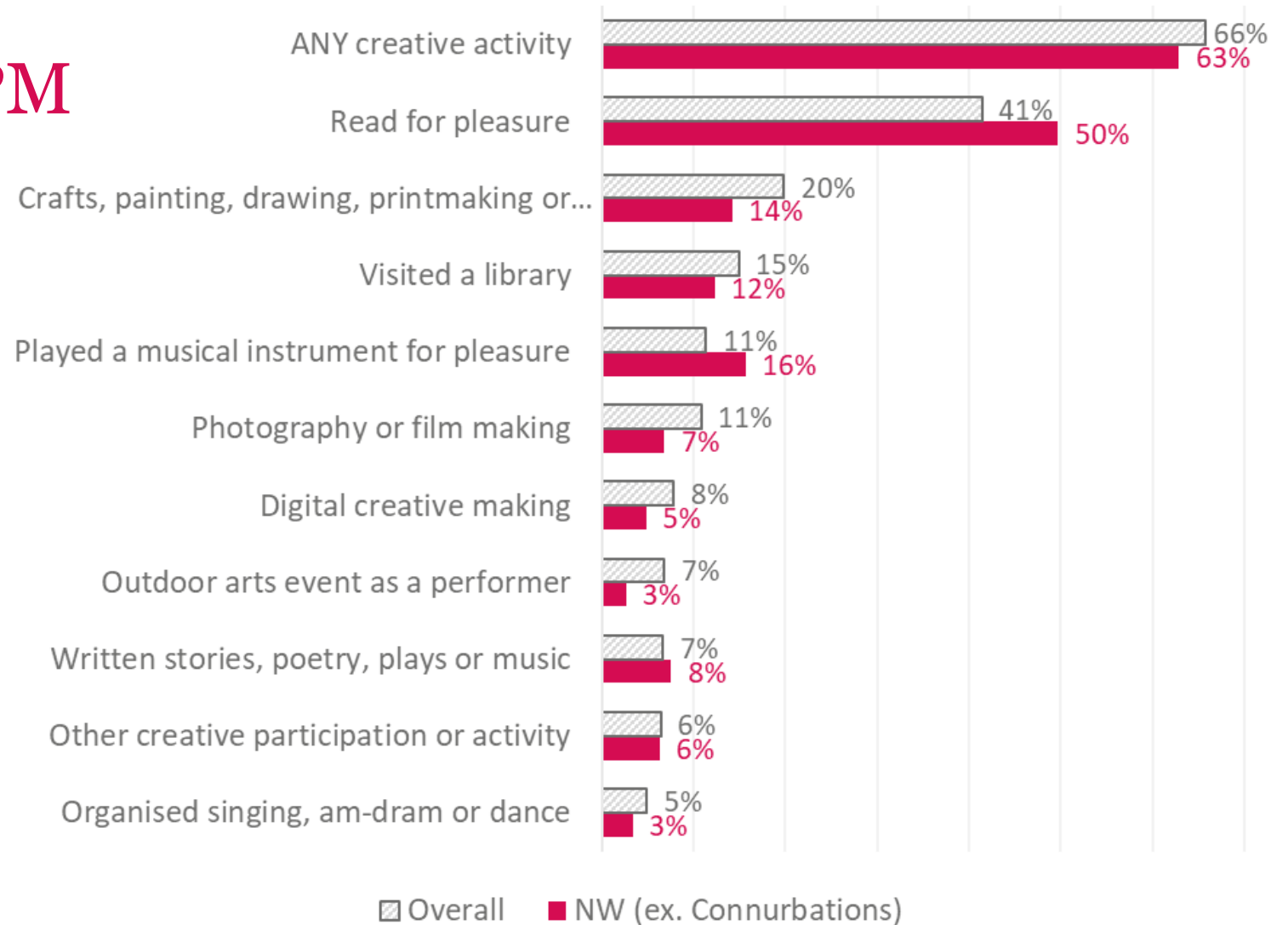
Engagement from Cultural Participation Monitor



Engagement from Cultural Participation Monitor

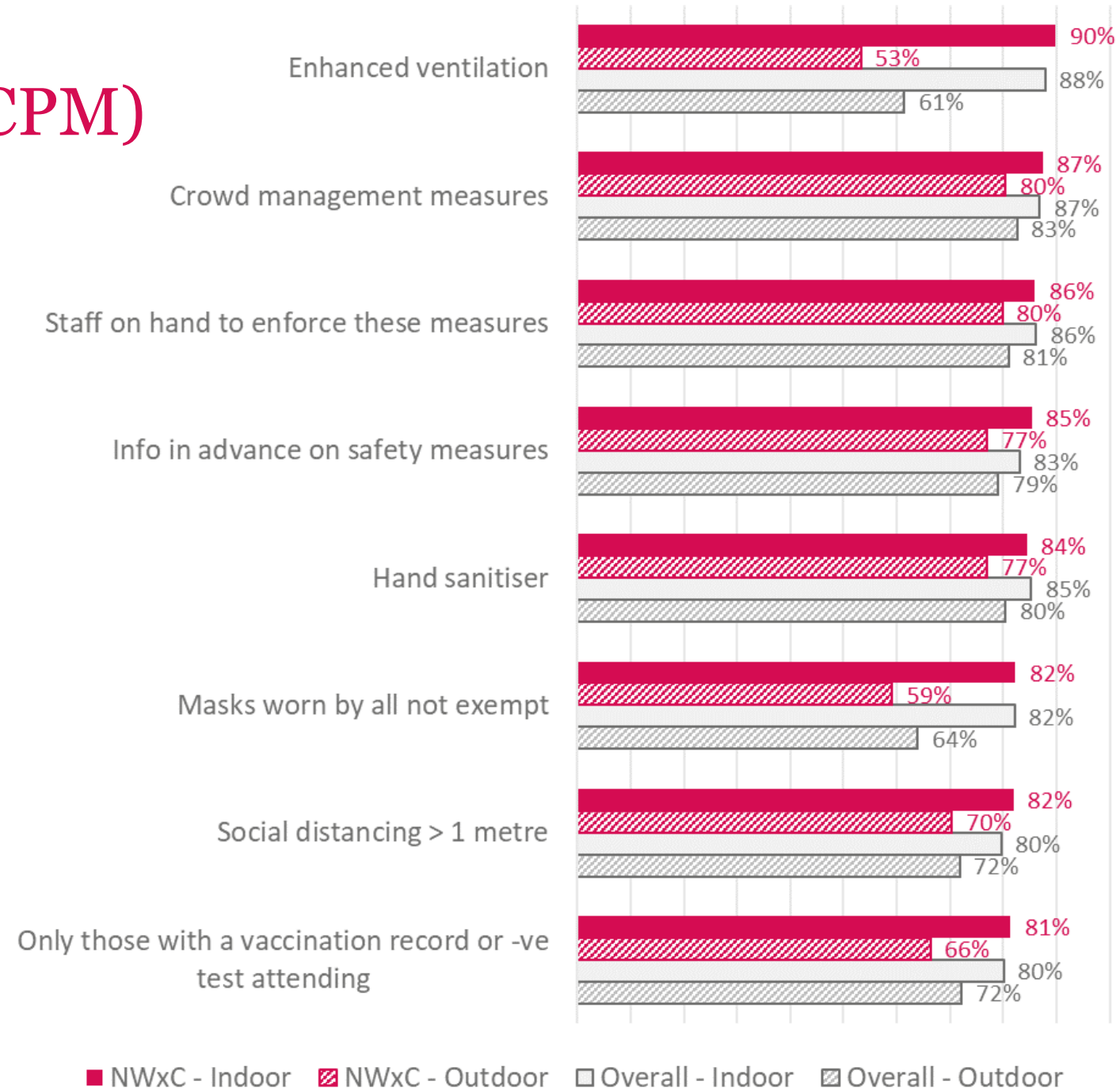


Engagement from CPM

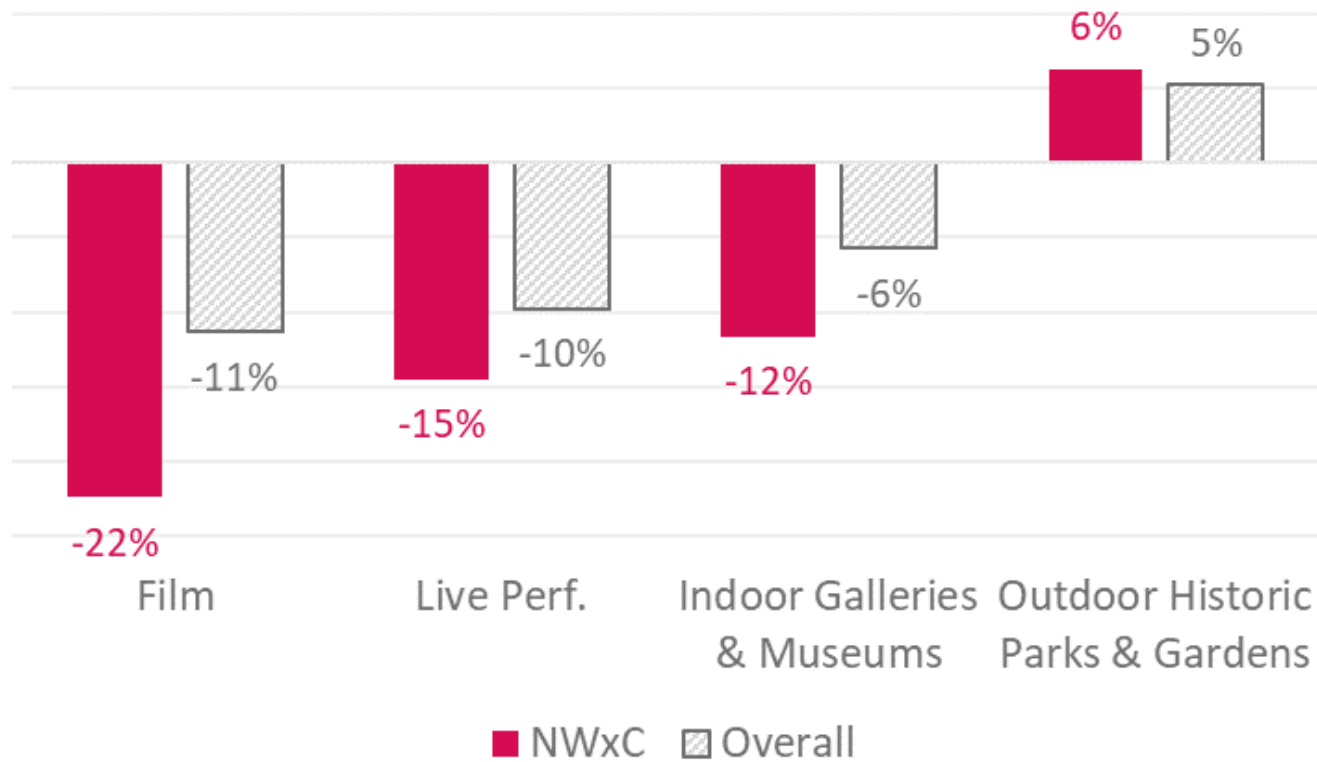


Attitudes to Measures (CPM)

% rating the measure 'very important' or 'important' to feel comfortable.



Future Attendance: Net More – Less



Note: Figures are net % more-less, on a scale of 1 (more often) to 5 (less often), where 3 is 'the same' and 2 and 4 are half-weighted.

Discussion

In Conclusion...?

From Evidence:

- Lots of variety within the area
- Overall a mid-engaged local audience
- Shift from older -> families?
- c. 1/3 incoming audiences are Mcl/CC
- More transactions per booker, for fewer higher value tickets.
- Reluctance re COVID/future

From Discussion...:

Note that locals bring non-locals - hence diluting the latter within the overall audience: local audience key. Some audiences have been more local. Impact of the weather and flooding in recent weeks has compounded the issues from COVID.

The most engaged audiences have been returning quickly, but important to reach out to marginalised groups (as well as family audiences as key). CPP seen as a valuable model.

Discussion about whether Christmas was safe... Overall, a sense of constant change and uncertainty.

In Conclusion...?

Immediate:

- Slides (and follow-up conversation?) on the TAA Community (<https://community.theaudienceagency.org/>)
- Survey (!)
- Get in touch with any questions: oliver.mantell@theaudienceagency.org

Future:

- Audience Finder groups
- ‘Know your community’ free surgeries
- In Practice sessions
- Community Forum Live
 - Audience Finder Onboarding (26/1)
 - Libraries and Literature (27/1)
 - Outdoor Arts & Festivals (24/2)
- TEA Breaks (12/1 & monthly)

In Development...:

- Audience Spectrum 1.5
- Regional dashboards

Thank you

Please get in touch: theaudienceagency.org
oliver.mantell@theaudienceagency.org

 the audience agency