

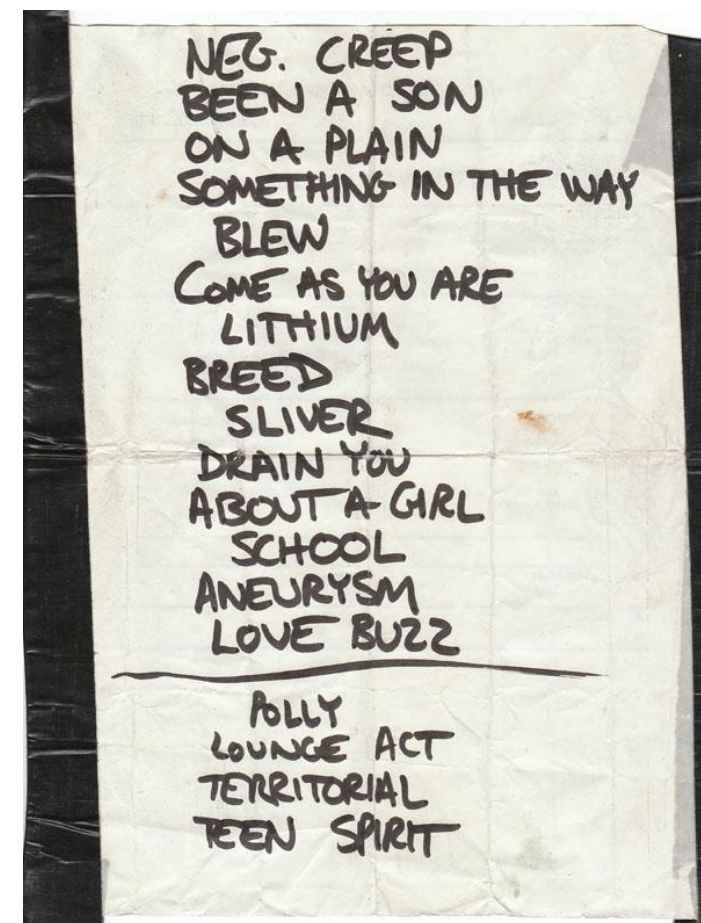
East Midlands

Place Based Insights

Oliver Mantell, Director of Evidence & Insight

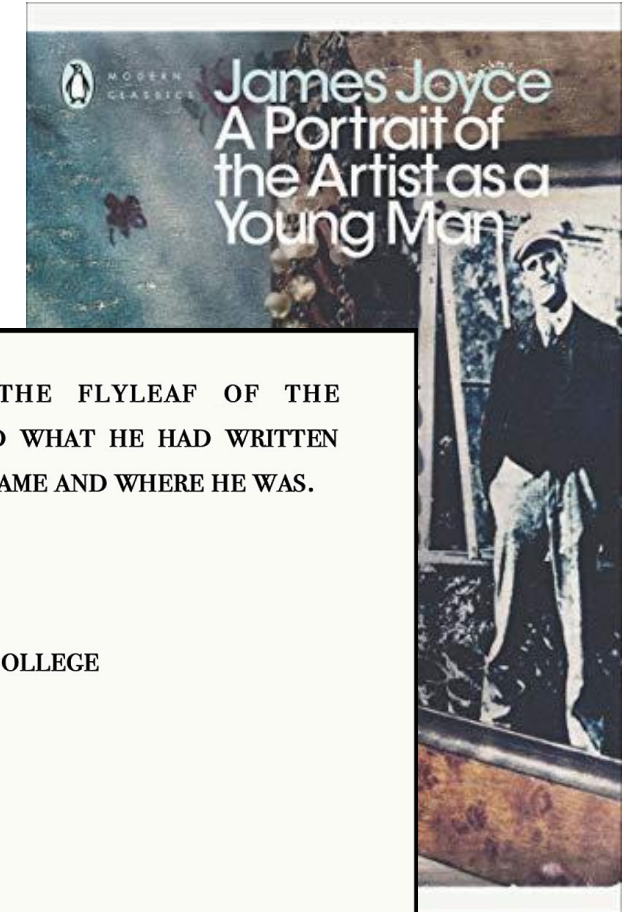
Format of the session

- 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:** Cultural Participation Monitor; Audience Spectrum
- **Subregional*:** 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"

Types and Levels of Information

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 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 galleries and heritage
- 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. They are active in mainstream and alternative offers. Mostly digital and social media savvy, they like to 'share' and follow recommendations. They are likely to form key influencers amongst their peers.

+ Interests

+ Location

+ Preferences

+ How to engage

Local Population

Local Area and Population

- Overview of demographics
- Audience Spectrum, inc. maps:
 - Largest segment
- Top Lines from Cultural Participation Monitor

NB - we're referring to this area (shown) as 'East Midlands' unless stated otherwise, although it's not the whole region.



Local Area and Population

- **Demographics:** Cf. the wider East Midlands Region, more diverse; 86% white (cf. 89%) and 9% Asian/Asian British (cf. 6%). 42% are families with children up to 18 (cf. 41%). 89% of economically active population are employed; 46% of economically inactive are retired and 21% are students. Population: 3.1M/4.9M (for EM Region).
- **Audience Spectrum:** Higher for Trips & Treats (20%), Facebook Families (15%) and Dormitory Dependables (14%). Lower for Metroculturals (0%), Heydays (5%) and Kaleidoscope Creativity (6%)
- **Arts Engagement (TGI):** Attendance levels are highest for theatre (43%), popular/rock concerts (42%), plays (33%), art galleries (31%) and comedy shows (28%).

Derby

- **Demographics:** Less diverse cf. Leicester and Nottingham; 80% white and 13% Asian/Asian British. Fewest families (46%) cf. Nottingham/Leicester. Relatively high employment among economically active cf. Leicester/Nottingham (86% cf. 89% in East Midlands). Professional occupations most prevalent (16%). Relatively low student pop (20%).
- **Audience Spectrum:** High: Trips & Treats (15%), Up Our Street (13%), Facebook Families (22%); Low: Commuterland Culturebuffs (6%), Heydays (6%).
- **Arts Engagement (TGI):** Relatively high attendance especially for theatre. Lower engagement than both Leicester and Nottingham for museums.

Derbyshire

- **Demographics:** Not ethnically diverse; 97% white (cf. 86% overall). High employment among economically active (91% cf. 89% overall). Slightly higher prevalence of skilled trades (13%) and process, plant or machine operatives (10%) occupations (cf. 12% and 9% overall respectively).
- **Audience Spectrum:** High: Trips & Treats (24%), Up Our Street (17%); Low: Experience Seekers (1%), Kaleidoscope Creativity (2%)
- **Arts Engagement (TGI):** Slightly lower attendance across artforms cf. Leicestershire and Nottinghamshire. Attendance is higher in the Derbyshire Dales and South Derbyshire.

Nottingham

- **Demographics:** Ethnically diverse; 72% white, 13% Asian/Asian British and 7% Black/Black British. Very high number of families (50% cf. 42% overall). Low employment for economically active (79% cf. 89% overall). Professional (16%) and elementary (17%) occupations most prevalent. Very high student pop (42%).
- **Audience Spectrum:** High: Experience Seekers (27%), Facebook Families (31%); Low: Commuterland Culturebuffs (2%), Home & Heritage (3%), Dormitory Dependables (4%)
- **Arts Engagement (TGI):** Highest attendance cf. Derby and Leicester.

Nottinghamshire

- **Demographics:** Not very diverse; 95% white (cf. 86% overall). Relatively high employment among economically active (91% cf. 89% overall). Higher levels of sales and customer service occupations (cf. Derbyshire and Leicestershire).
- **Audience Spectrum:** High: Trips & Treats (20%), Dormitory Dependables (16%), Up Our Street (16%); Low: Experience Seekers (4%), Kaleidoscope Creativity (1%)
- **Arts Engagement (TGI):** Relatively high attendance, especially classical concerts, opera and ballet. Attendance is higher in Rushcliffe, Broxtowe, Charnwood and Blaby.

Leicester

- **Demographics:** Highly diverse cf. Nottingham/Derby; 51% white, 37% Asian/Asian British and 6% Black/Black British. 82% employed among economically active (cf. 89% overall). Elementary occupations most prevalent (17%). High student pop (32%).
- **Audience Spectrum:** High: Experience Seekers (18%), Facebook Families (20%), Kaleidoscope Creativity (29%); Low: Commuterland Culturebuffs (2%), Home & Heritage (2%)
- **Arts Engagement (TGI):** Lowest attendance cf. Nottingham and Derby, particularly for art galleries, theatre/plays and popular/rock concerts. Higher attendance for museums and film.

Leicestershire

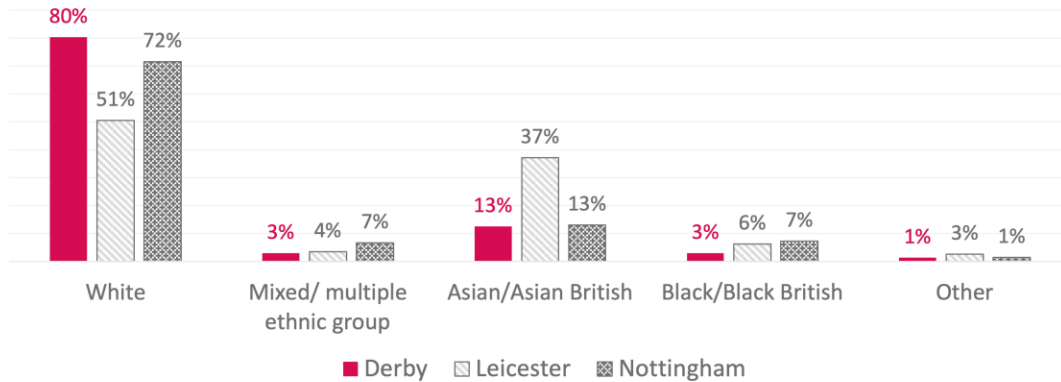
- **Demographics:** Relatively ethnically diverse (91% white cf. 89% overall). Relatively high employment among economically active (91% cf. 89% overall). High student population among economically inactive (21%). Relatively high prevalence of professional (17%) and managerial (12%) occupations (cf. 16% and 10% overall respectively).
- **Audience Spectrum:** High: Trips & Treats (28%), Dormitory Dependables (21%); Low: Kaleidoscope Creativity (1%), Heydays (3%)
- **Arts Engagement (TGI):** Higher attendance cf. Nottinghamshire and Derbyshire, especially for theatre and museums. Attendance is highest in Harborough and Oadby & Wigston.

Rutland

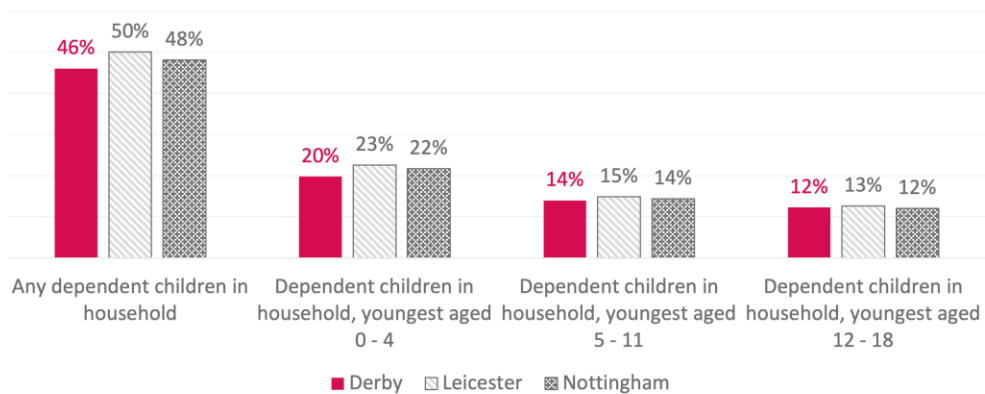
- **Demographics:** Not ethnically diverse; 97% white. Relatively few families (37% cf. 42% overall). High employment; 93% employed among economically active (cf. 89% overall). Professional (18%), associate professional/technical (16%), managers (15%) most prevalent occupations. Older population (21% over 65 cf. 16% overall)
- **Audience Spectrum:** High: Commuterland Culturebuffs (23%), Trips & Treats (24%); Low: Experience Seekers (2%), Facebook Families (3%), Heydays (3%)
- **Arts Engagement (TGI):** High attendance across artforms, particularly for art galleries, theatre, classical music and heritage.

Example Comparisons

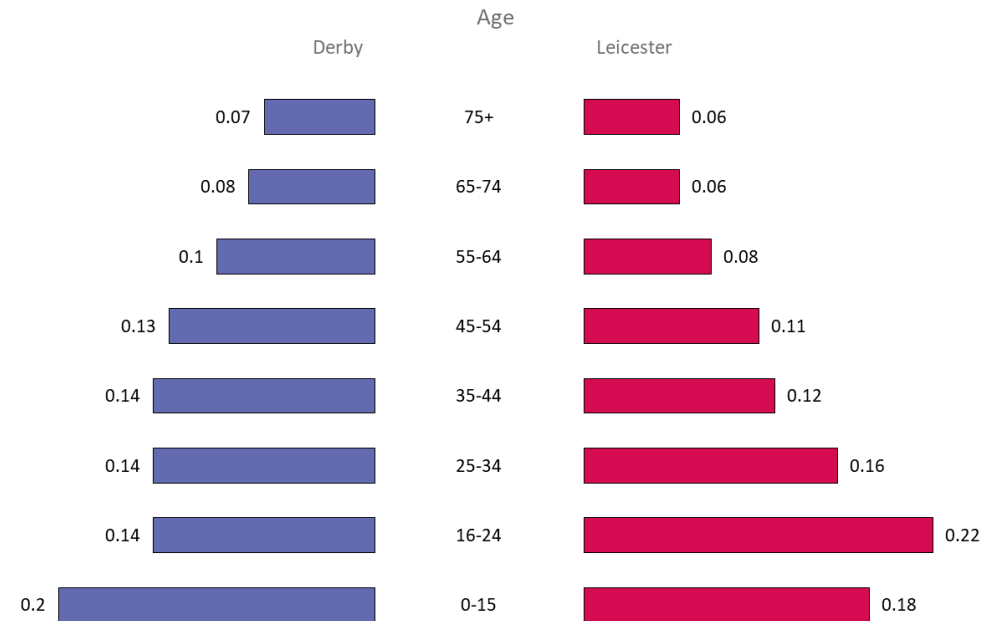
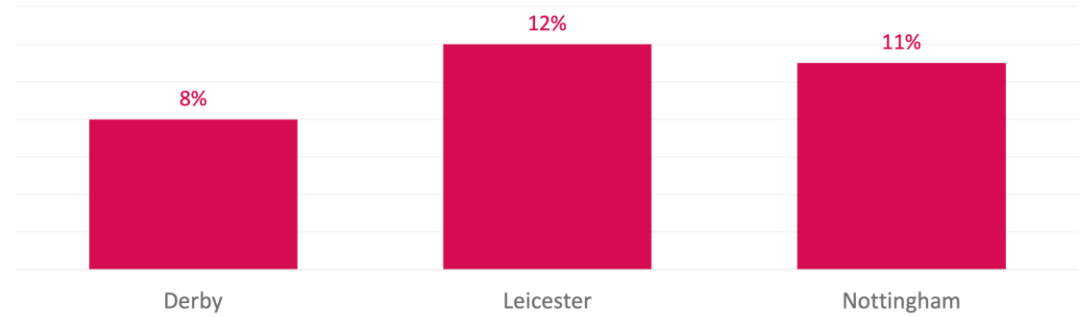
Leicester is the most ethnically diverse city in the region



Derby has the fewest families, especially families with very young children

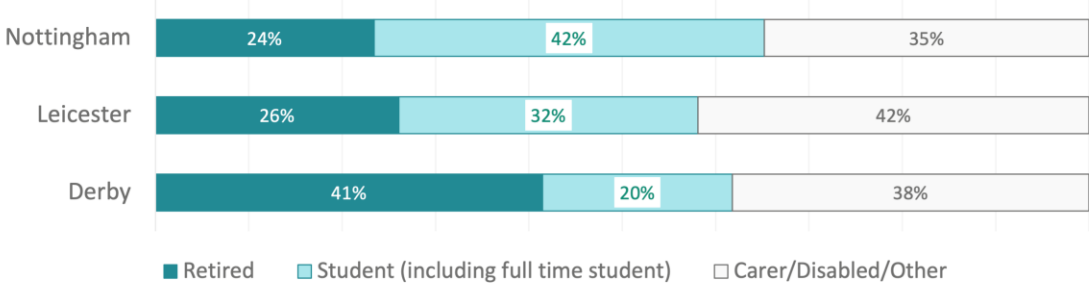


Population estimate 2019 (% of overall region)

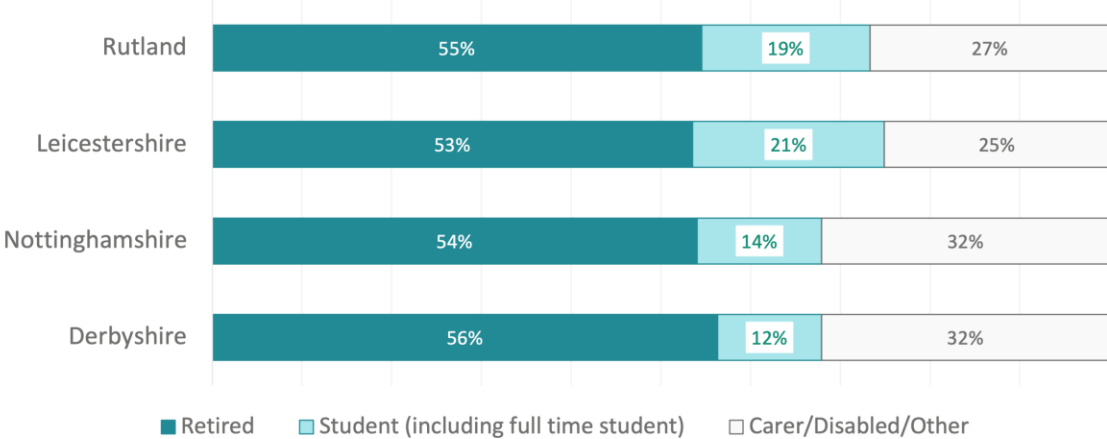


Example Comparisons

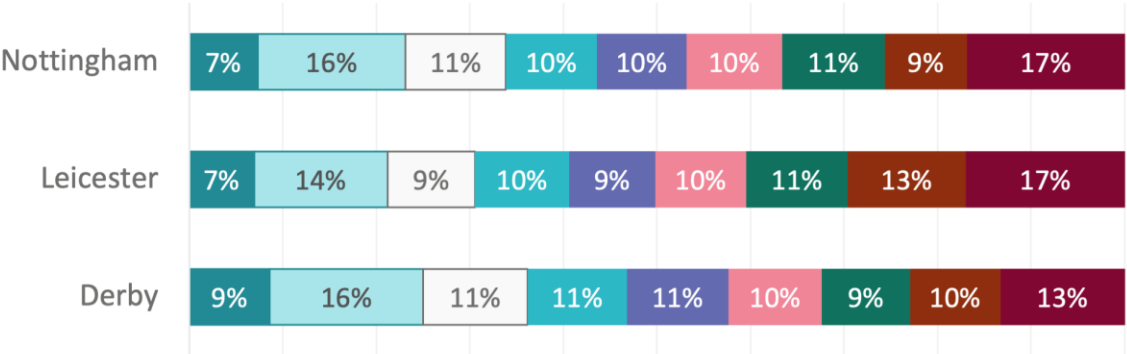
CITIES: Among the economically inactive population, Derby has the highest proportion of retirees while Nottingham has the most students



COUNTIES: Among the economically inactive population, the two most southern counties, Rutland and Leicestershire, have a similar profile



Leicester has a higher percentage of process, plant and machine operatives, while Derby and Nottingham have more in professional occupations



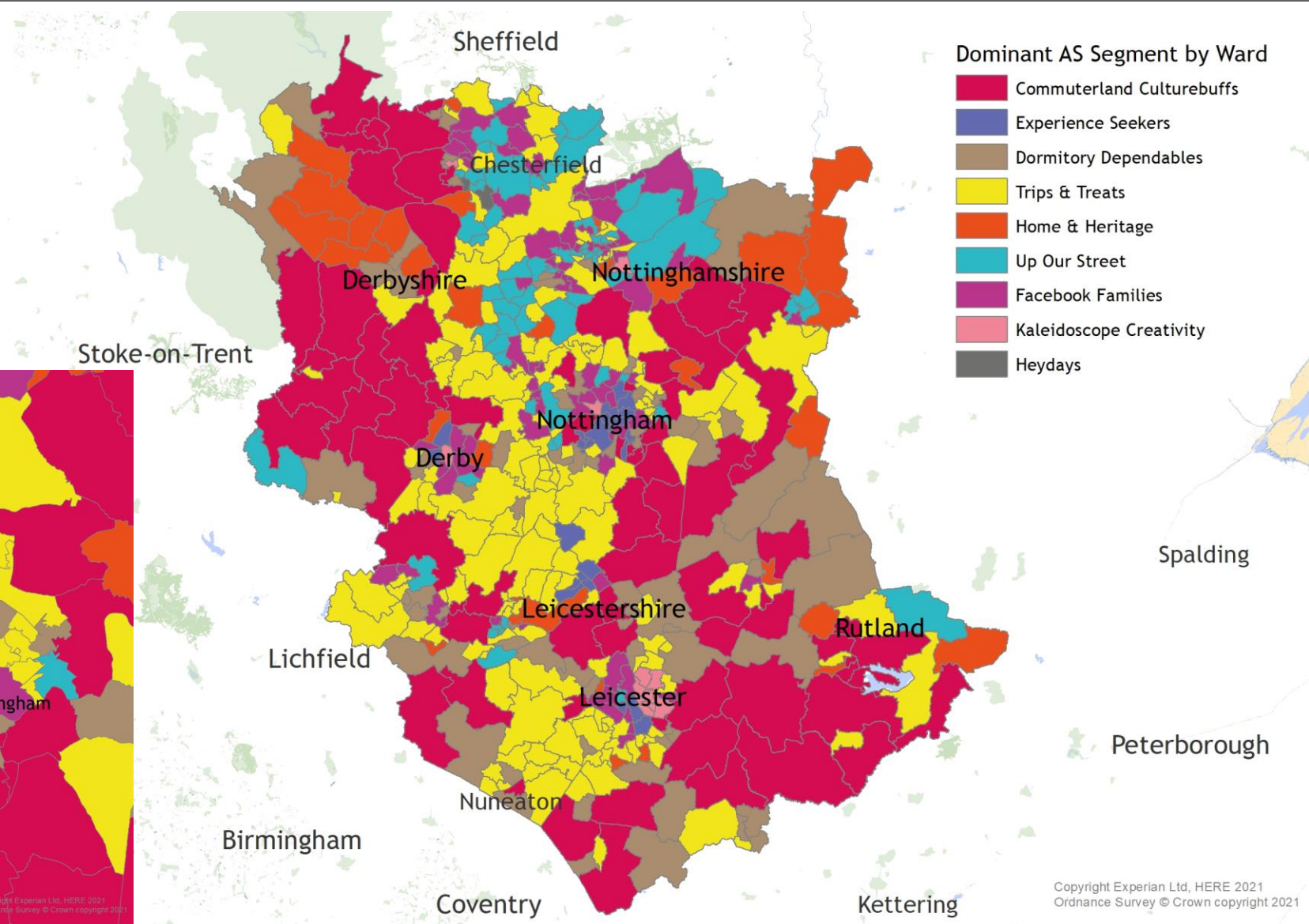
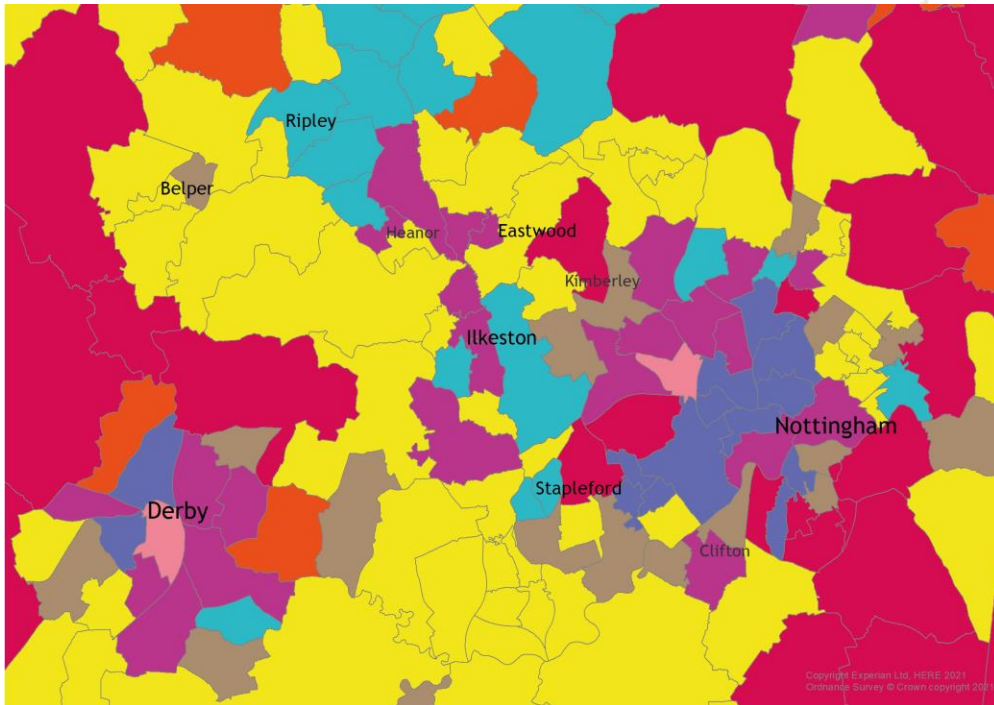
- Managers, directors and senior officials
- Professional occupations
- Associate professional and technical occupations
- Administrative and secretarial occupations
- Skilled trades occupations
- Caring, leisure and other service occupations
- Sales and customer service occupations
- Process, plant and machine operatives
- Elementary occupations

Overall Audience Spectrum Profile

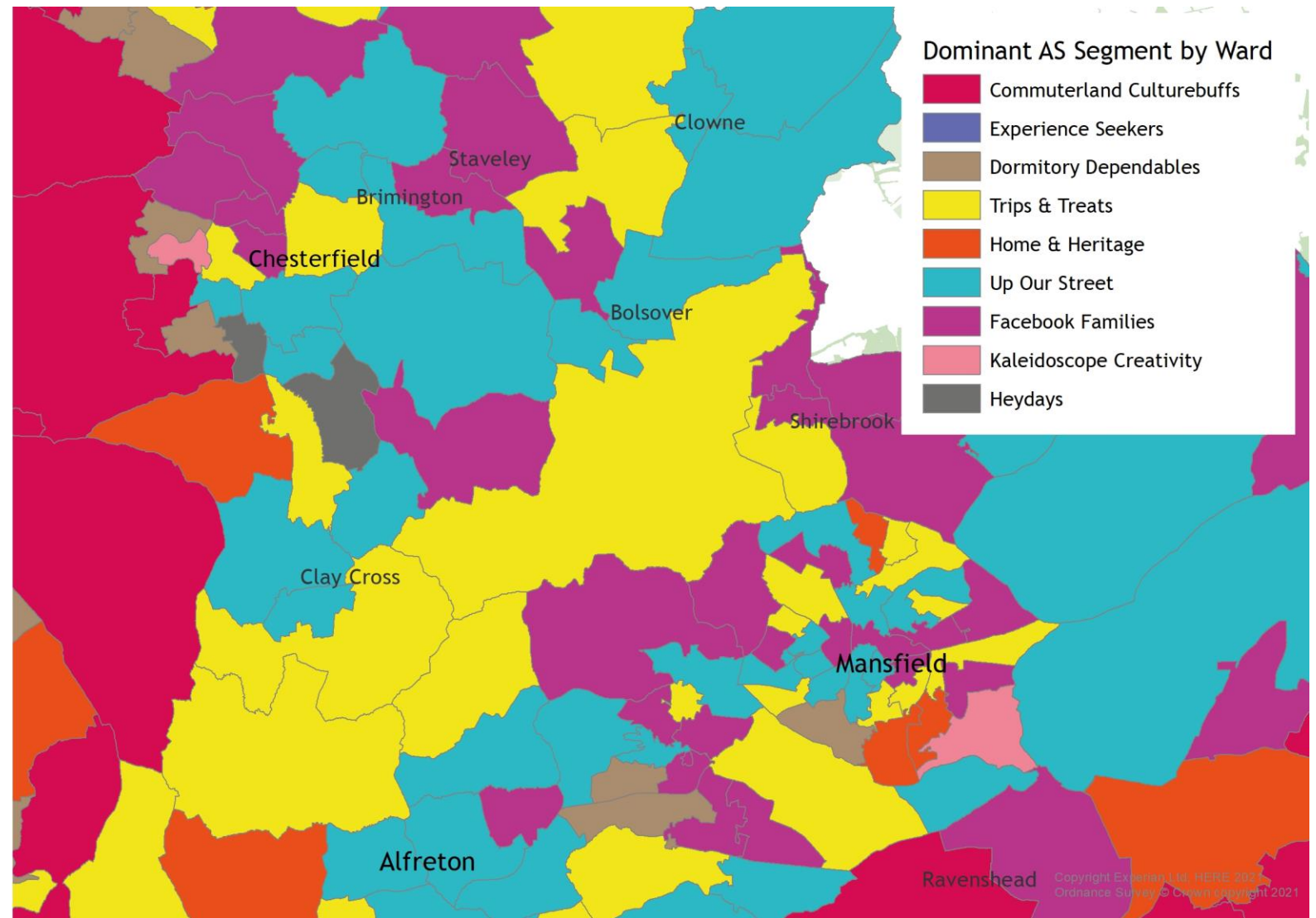
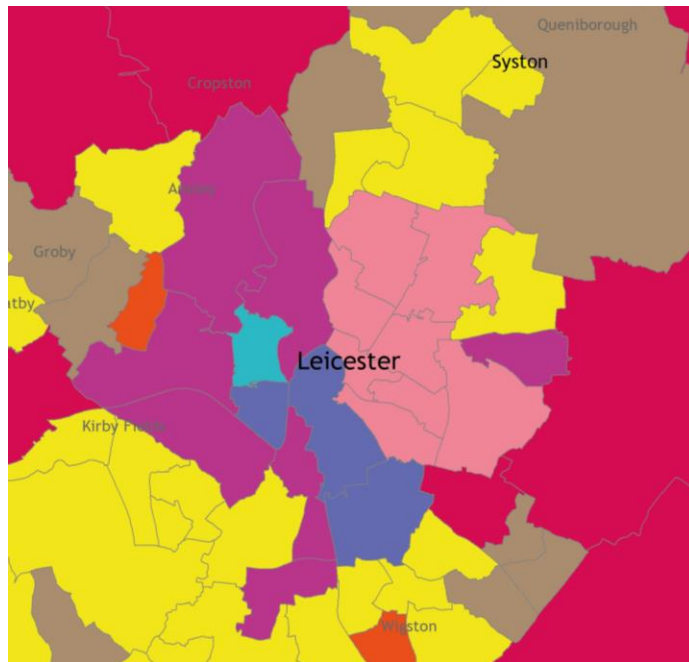
High Concentrations of Groups with More Families



Dominant Audience Spectrum Segment by Ward

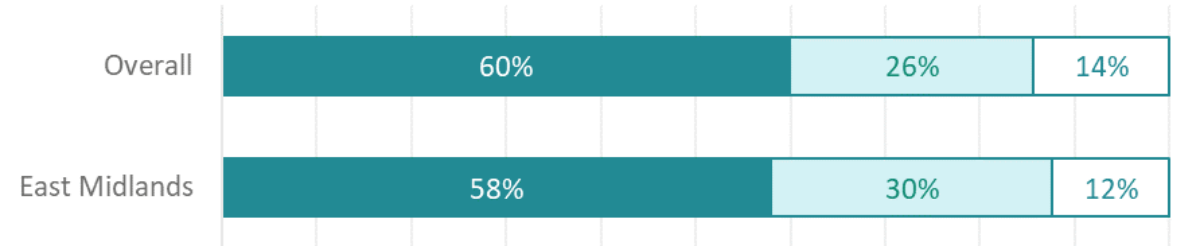
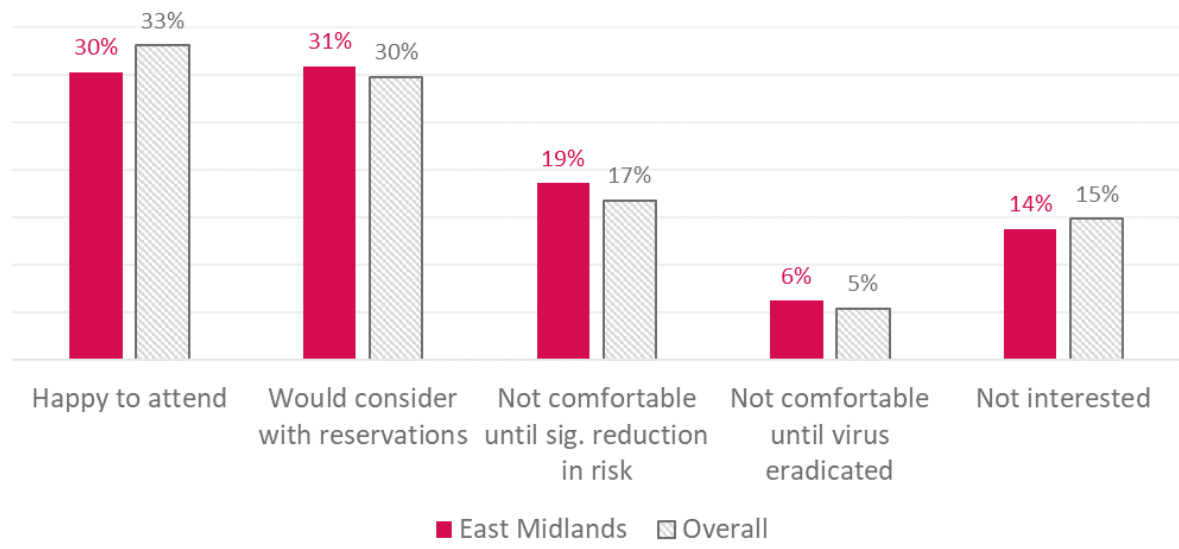


Dominant Audience Spectrum Segment by Ward



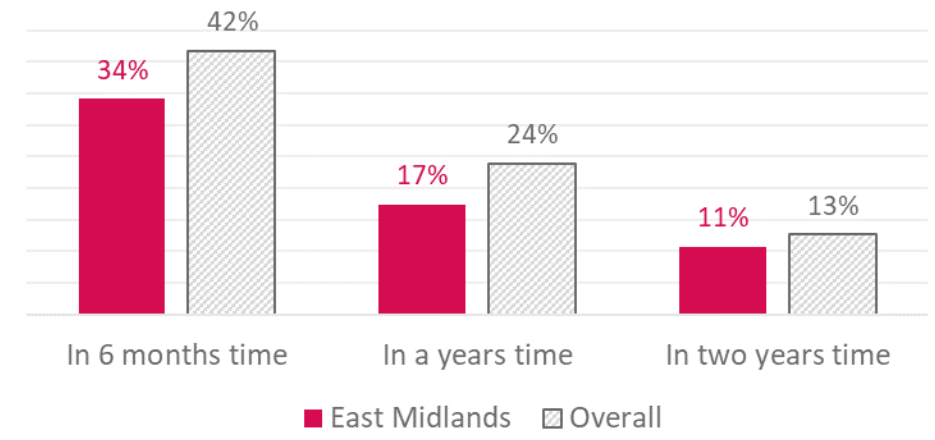
Top Lines from CPM

Mix of attitudes: warier of attending and most 'worried re others I know' catching COVID (67% vs 62% overall), but think it will blow over and want to 'reduce...but not go too far'.



- 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

% Who Think COVID is 'Very Likely' to Still Have Impact...



Local Audiences

About Local Audiences

- Audience Finder

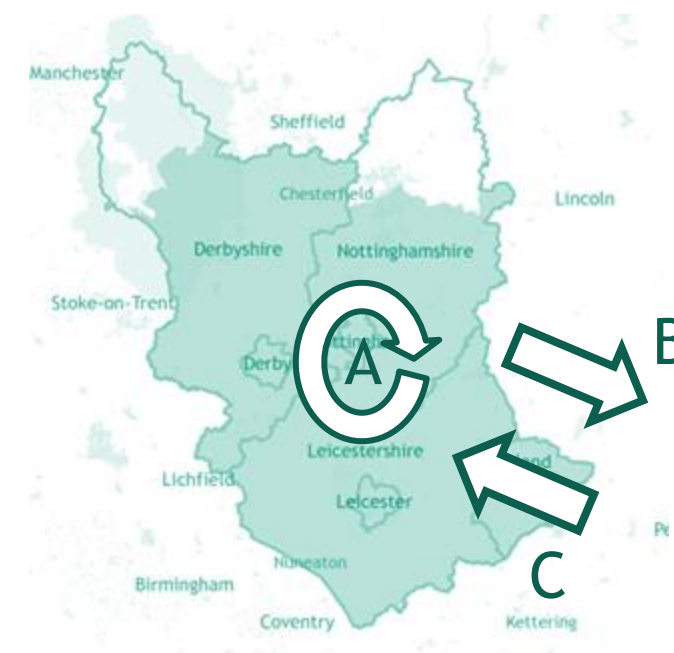
- Based on **120k surveys** (17/18-19/20) and **6.0M transactions** (16/17-19/20), across 659 (overall)/50 (local) and 350 (overall)/12 (local) orgs respectively:

- Attenborough Arts Centre
- Curve Theatre
- Deda
- Derby Live
- Derby QUAD
- Derby Theatre
- Mansfield Palace Theatre
- Nottingham Playhouse
- TNEM Dance4
- TNEM Nottingham Lakeside Arts
- TNEM Nottingham Theatre Royal and Concert Hall
- TNEM Other

- Cultural Participation Monitor

- **406 / 5,692 surveys**

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

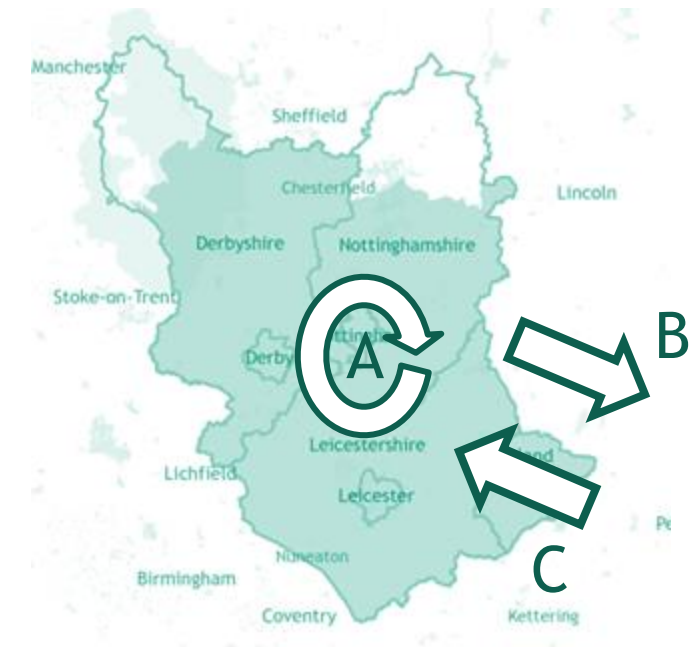


About Local Audiences

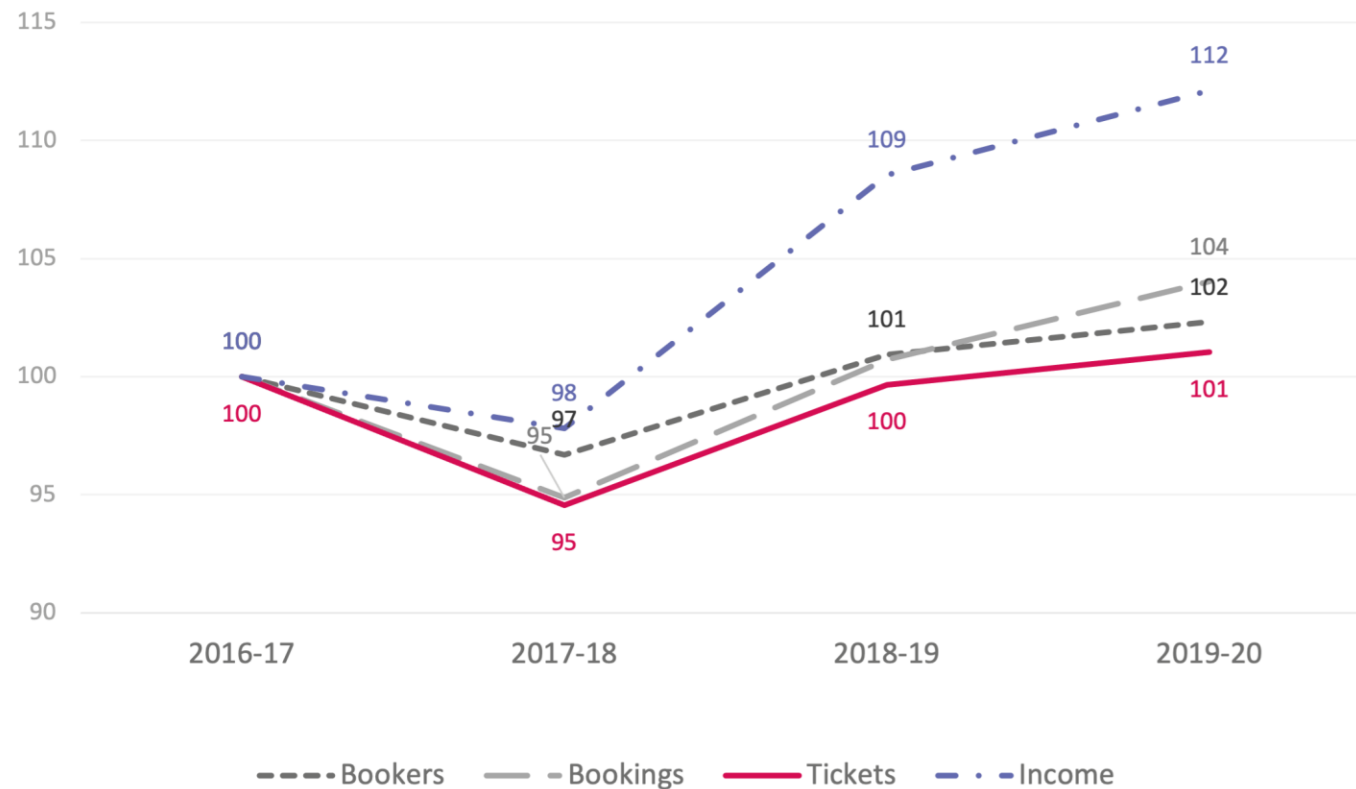
- Audience Finder ticketing:

	16/17	19/20	Increase
Bookers	244k	250k	6k
Bookings	573k	596k	23k
Tickets	1.49M	1.5M	10k
Income	£33.5M	£37.5M	£4M

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



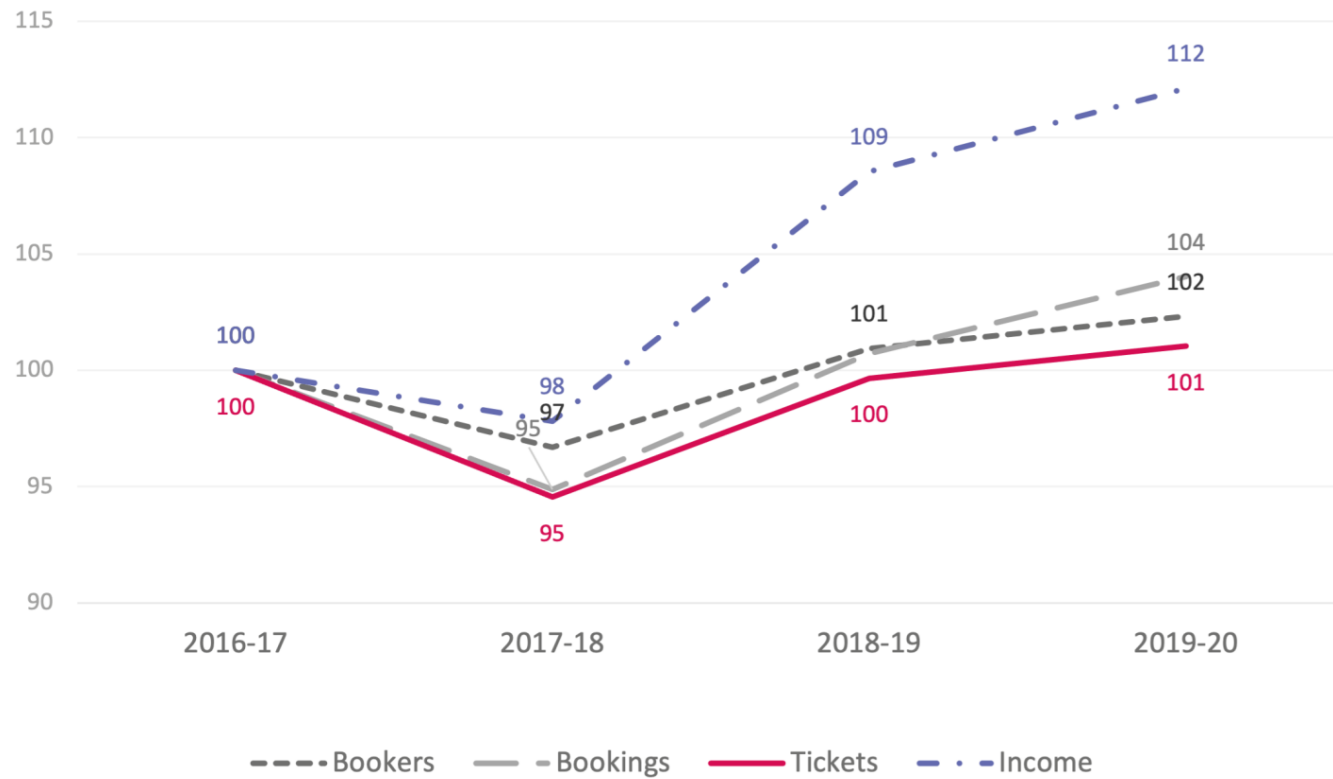
Sales Trends



Based on 12 ticketed venues.

All measures rose, but especially income, i.e. similar levels of sales generated greater income per ticket, booker and booking.

Sales Trends



2019/20:

Avg. income/ticket: £24.88, **+11%**

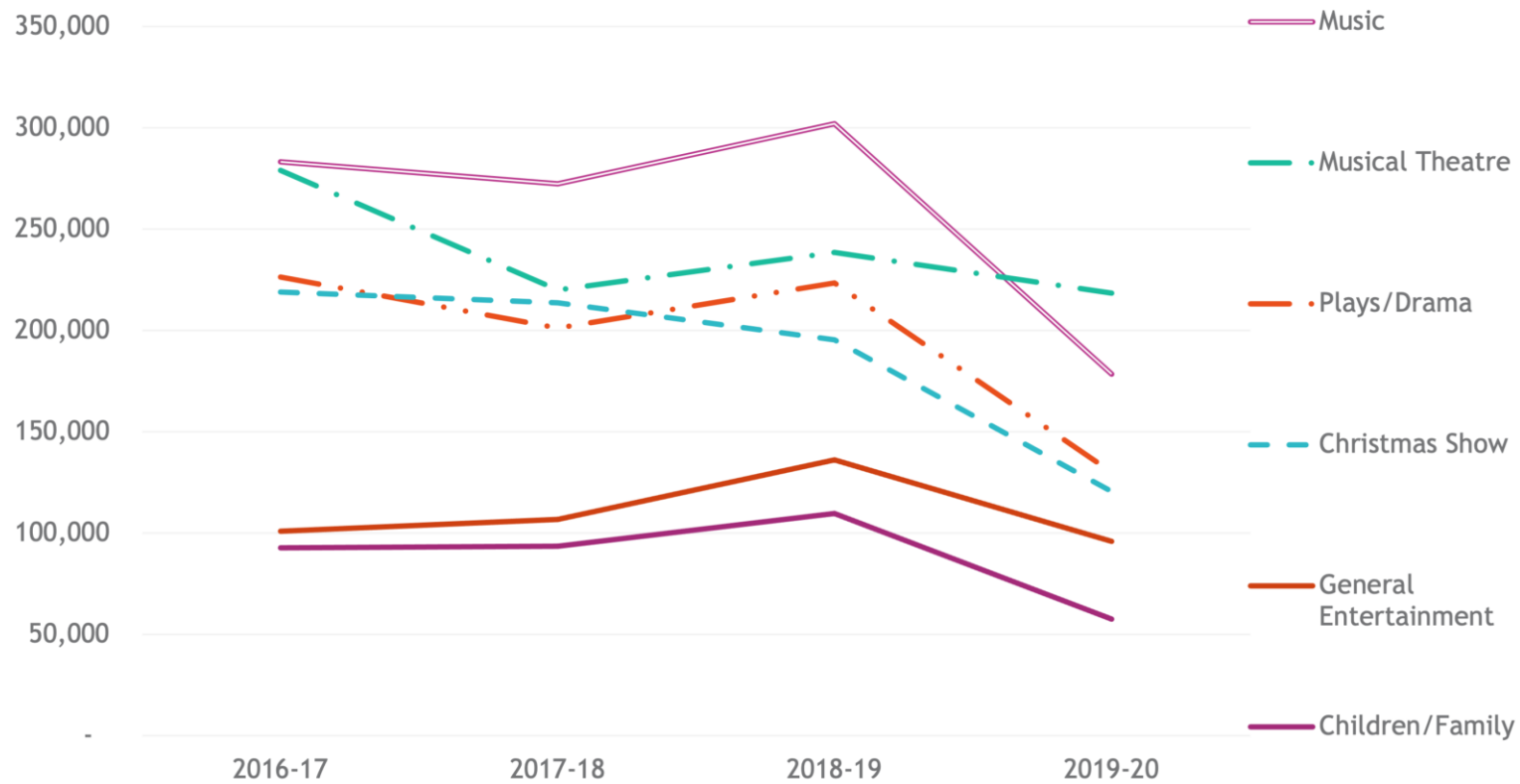
Avg. tickets/booker: 6, **-1%**

Avg. bookings/booker: 2.4, **+2%**

Avg. tickets/booking: 2.5, **-3%**

Audience Trends

Ticket sales by year for six most popular artforms

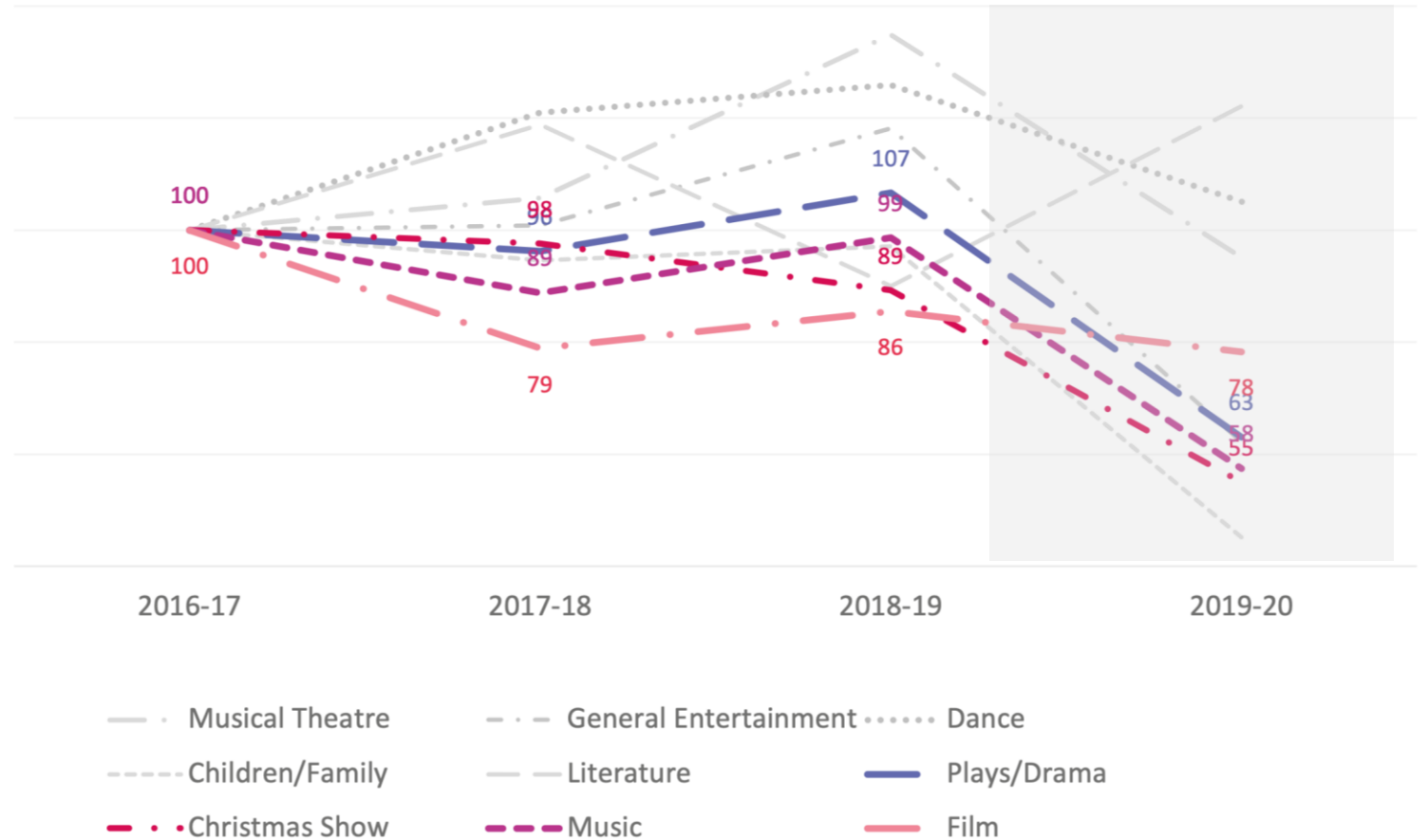


Sales Trends

Number of tickets per art form:

Musical Theatre, Dance, General Entertainment and Plays/Drama increased

Drops in Film & Christmas Shows



About Local Audiences

Ticketing

A = 178K

B = 102K

C = 41K

Survey

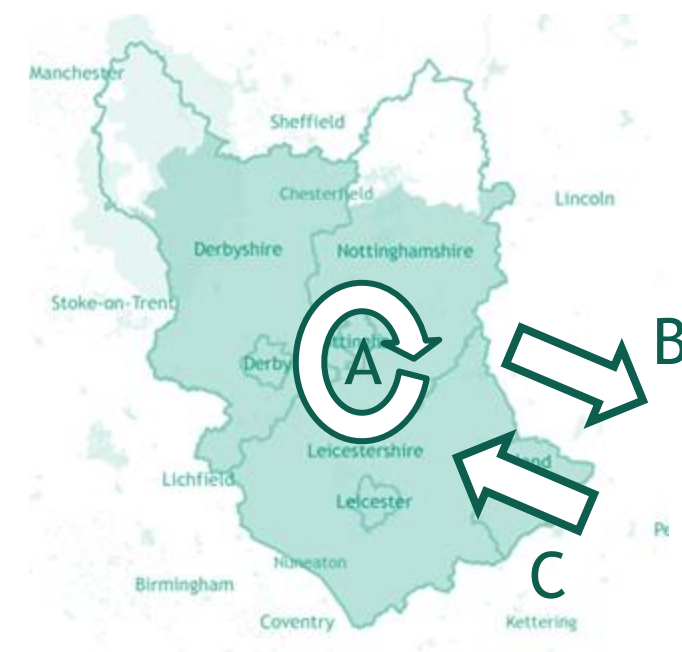
A = 27,723

B = 10,915

C = 7,403

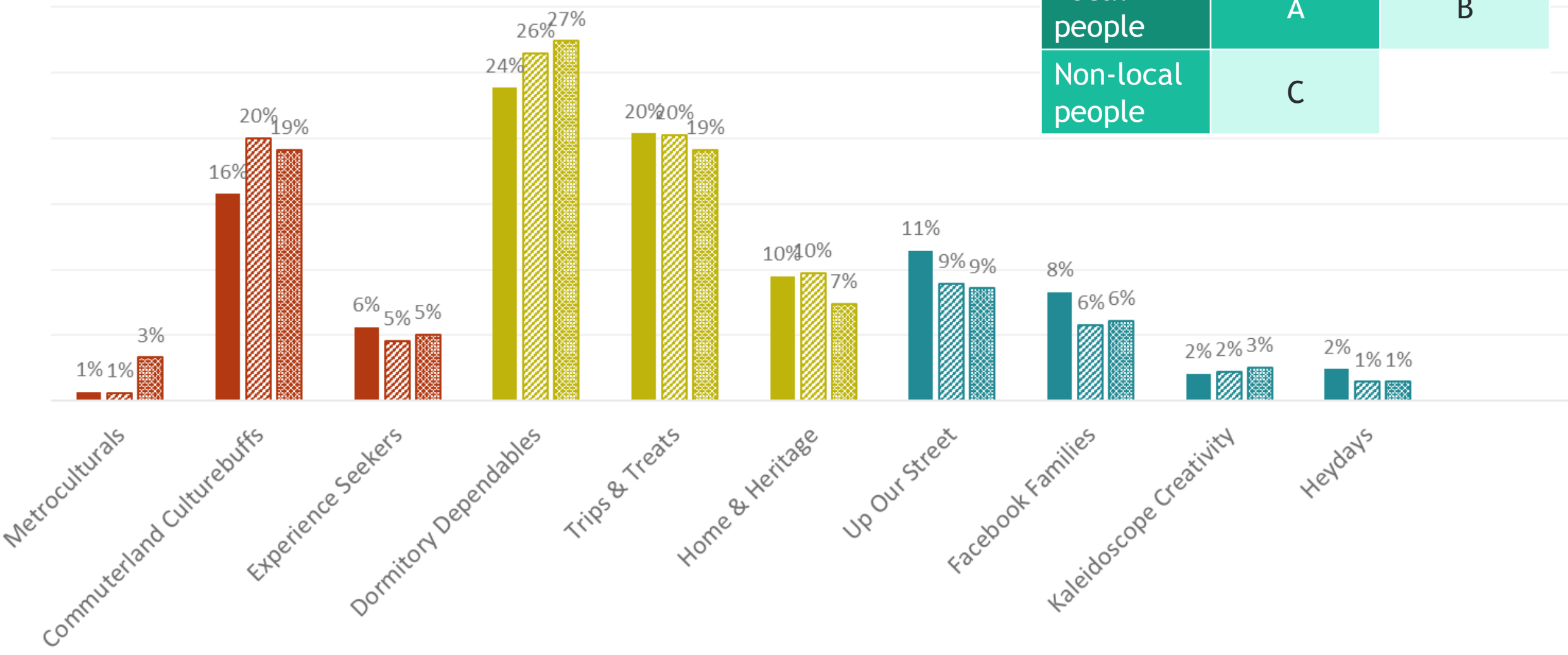
This area is a net importer of bookers/attenders, although audiences are mostly local: c. 62% of local survey respondents travel 0-15 miles (and 67% of respondents at local orgs).

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



Local/Non-Local Audiences (Ticketing

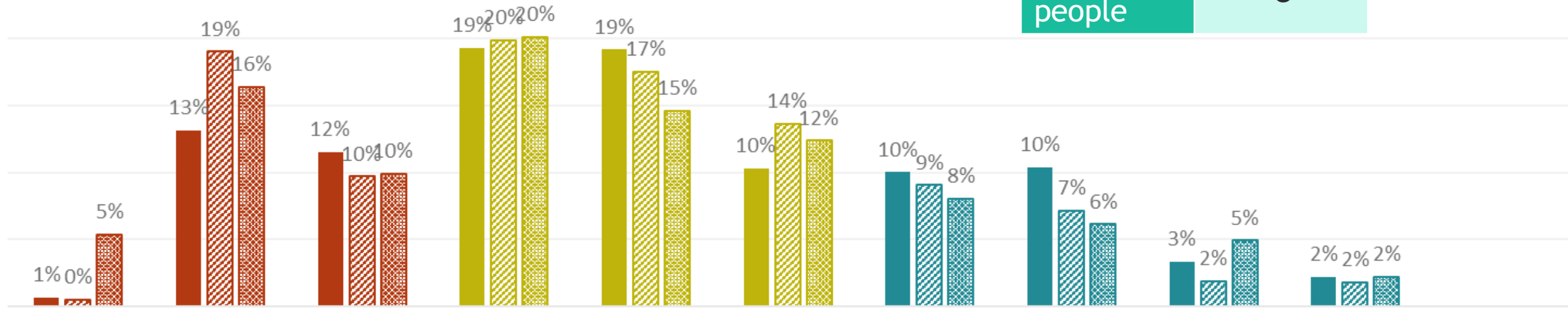
	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	



■ 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)

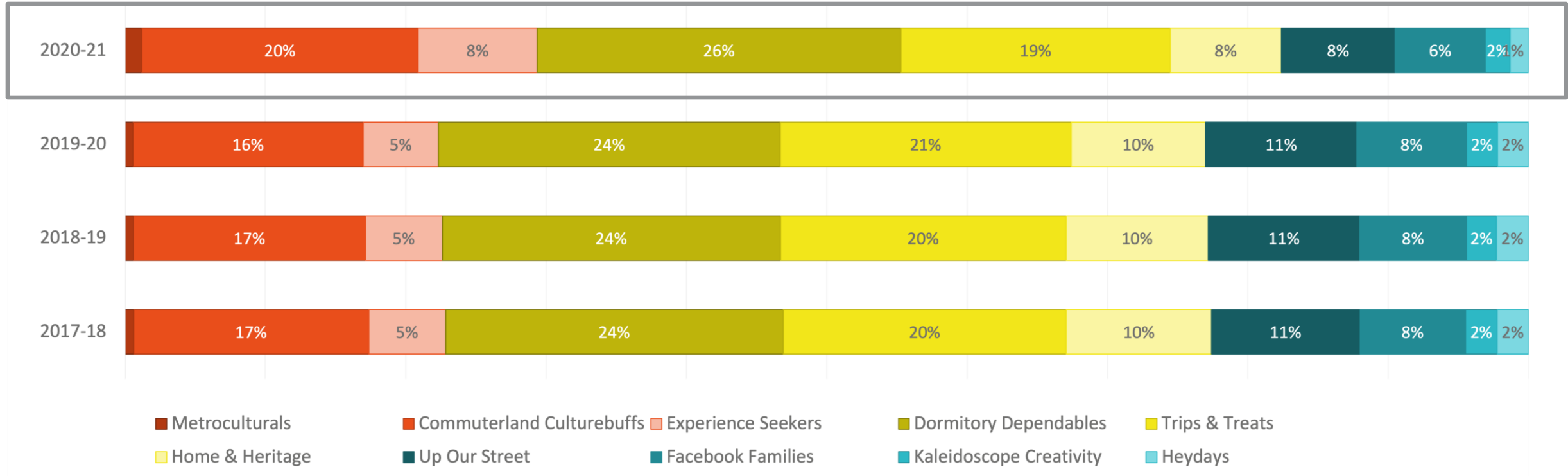
	Local orgs	Non-local orgs
Local people	A	B
Non-local people	C	



■ A - Local attenders at Local venues
 ▨ B - Local attenders at Non-Local venues
 ▩ C - Non-Local attenders at Local venues

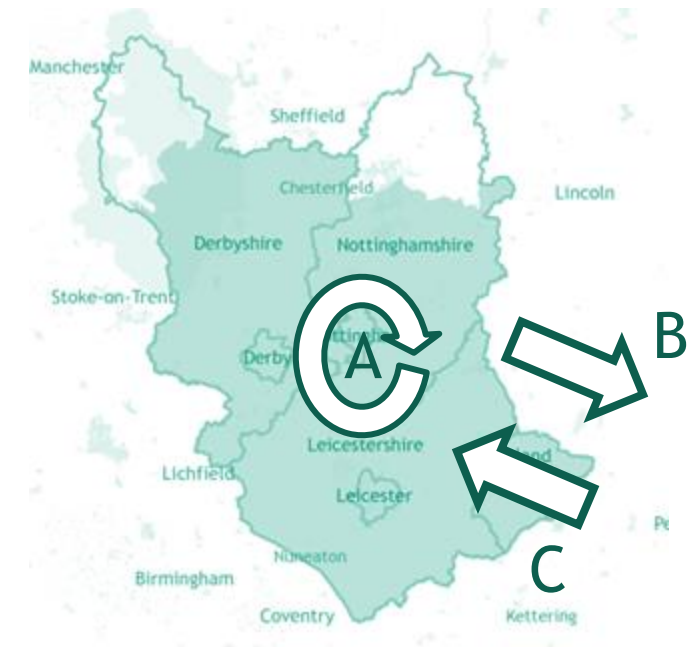
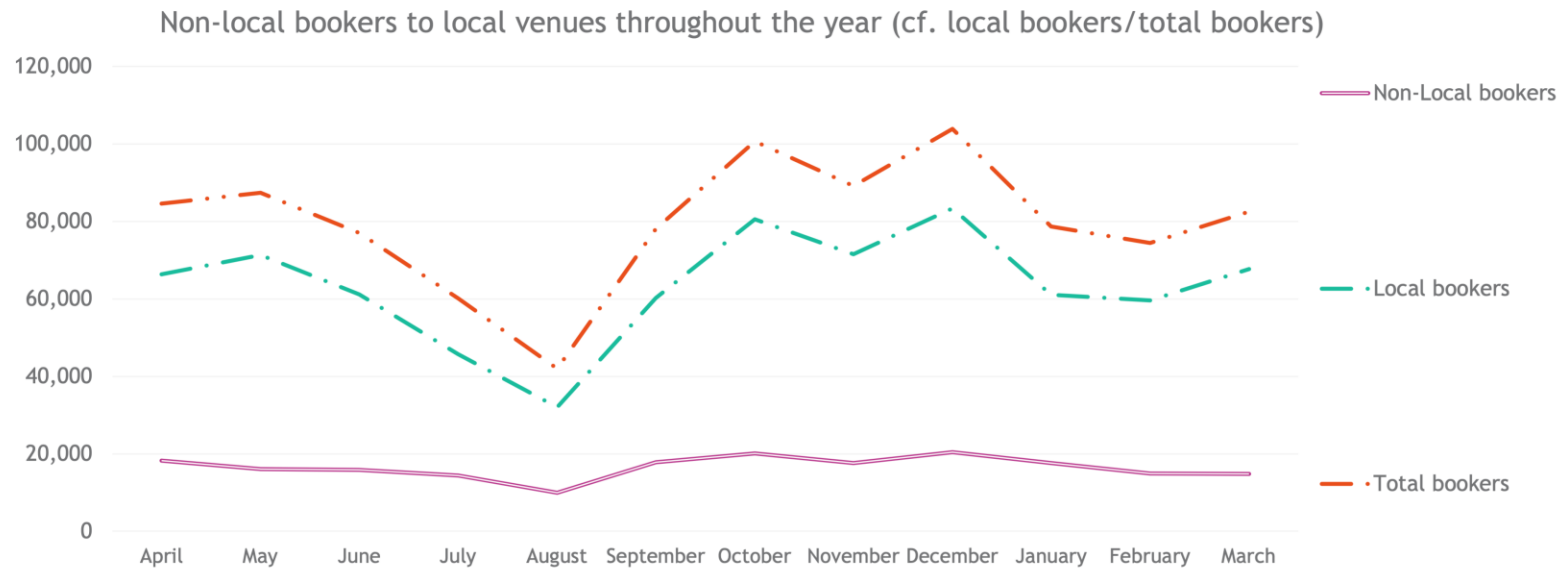
Audience Trends

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



Non-Local Audiences

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



Audience Trends

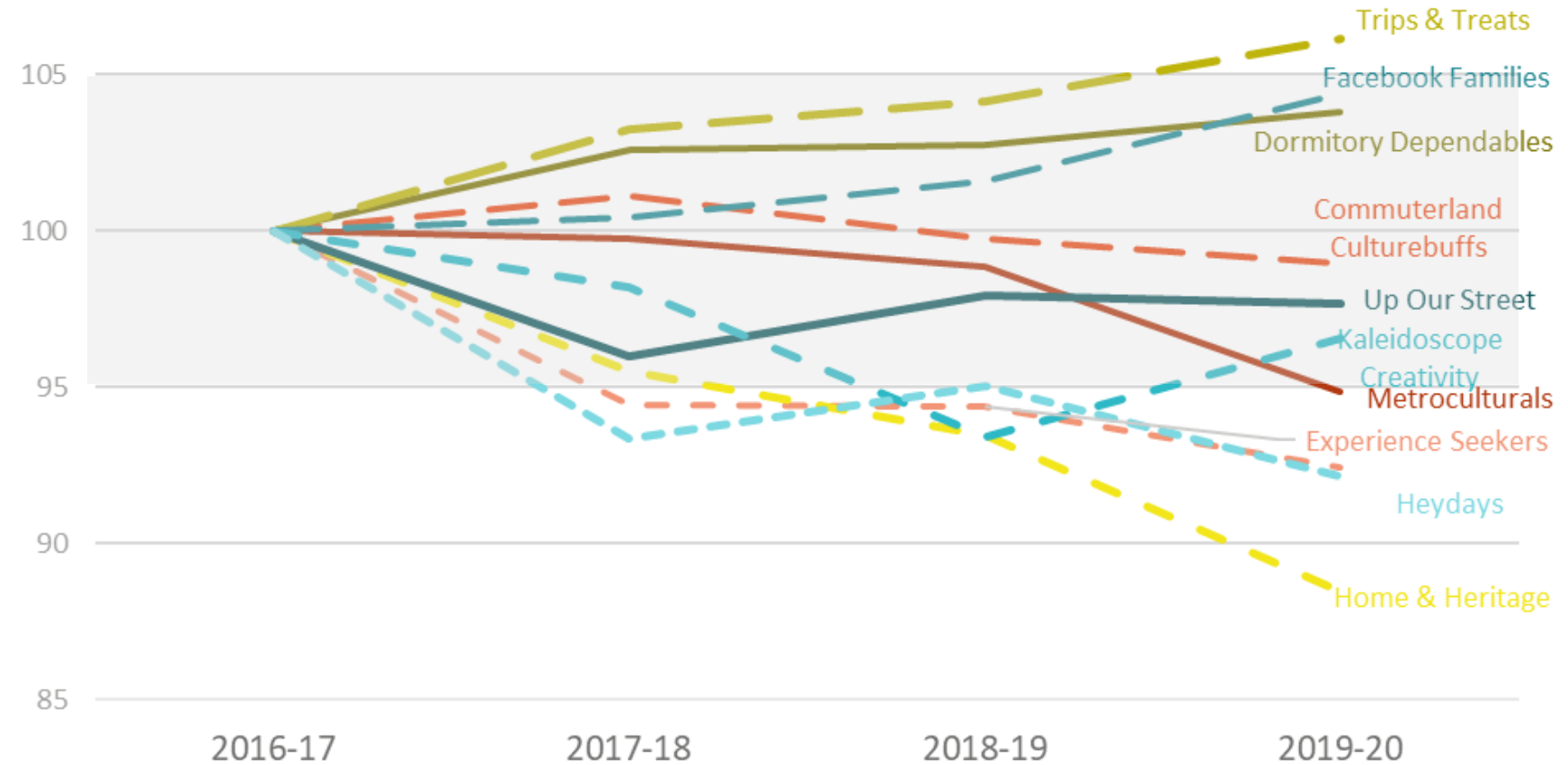
Family



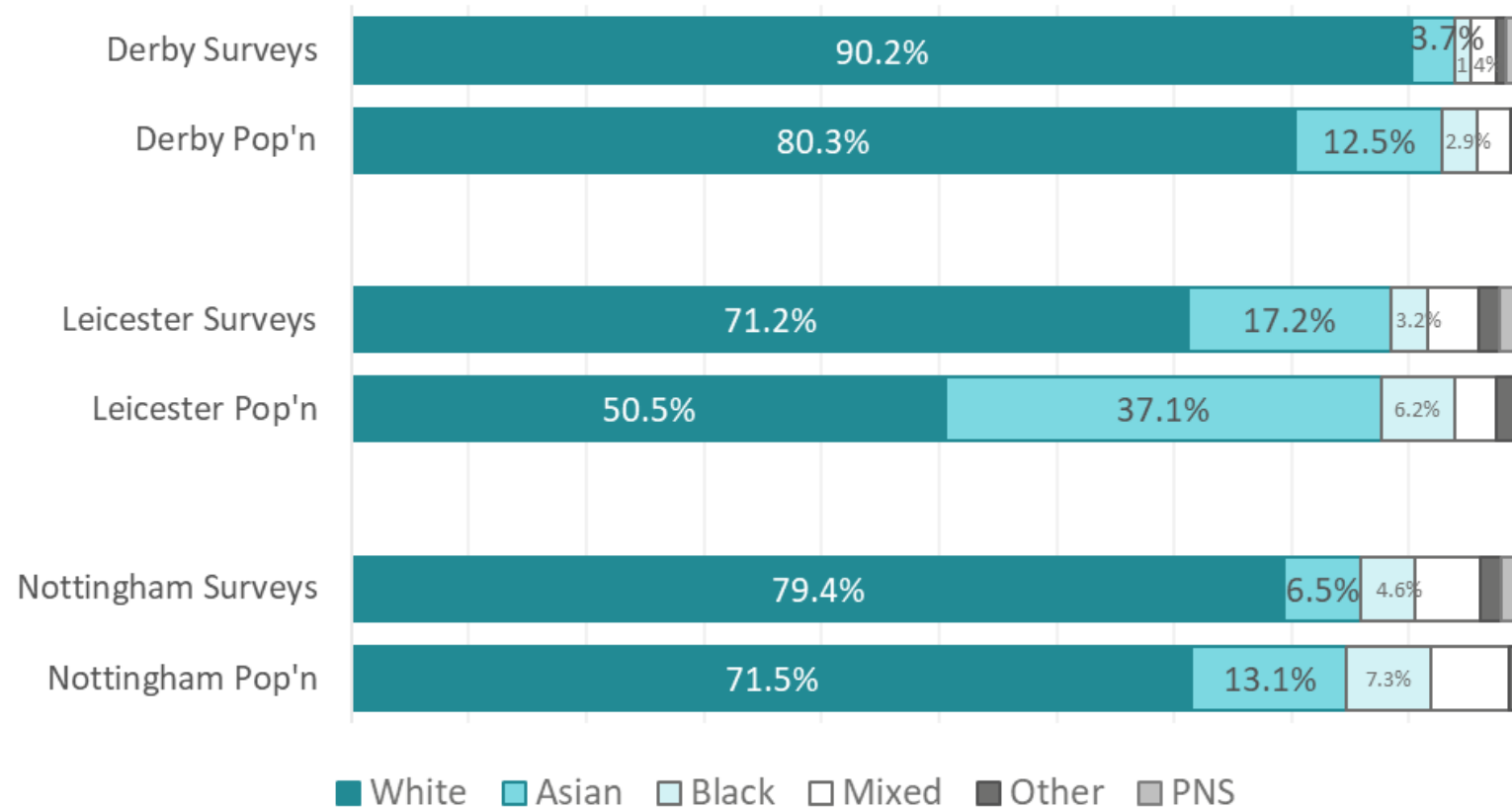
Older/



Higher-
engaged (?)

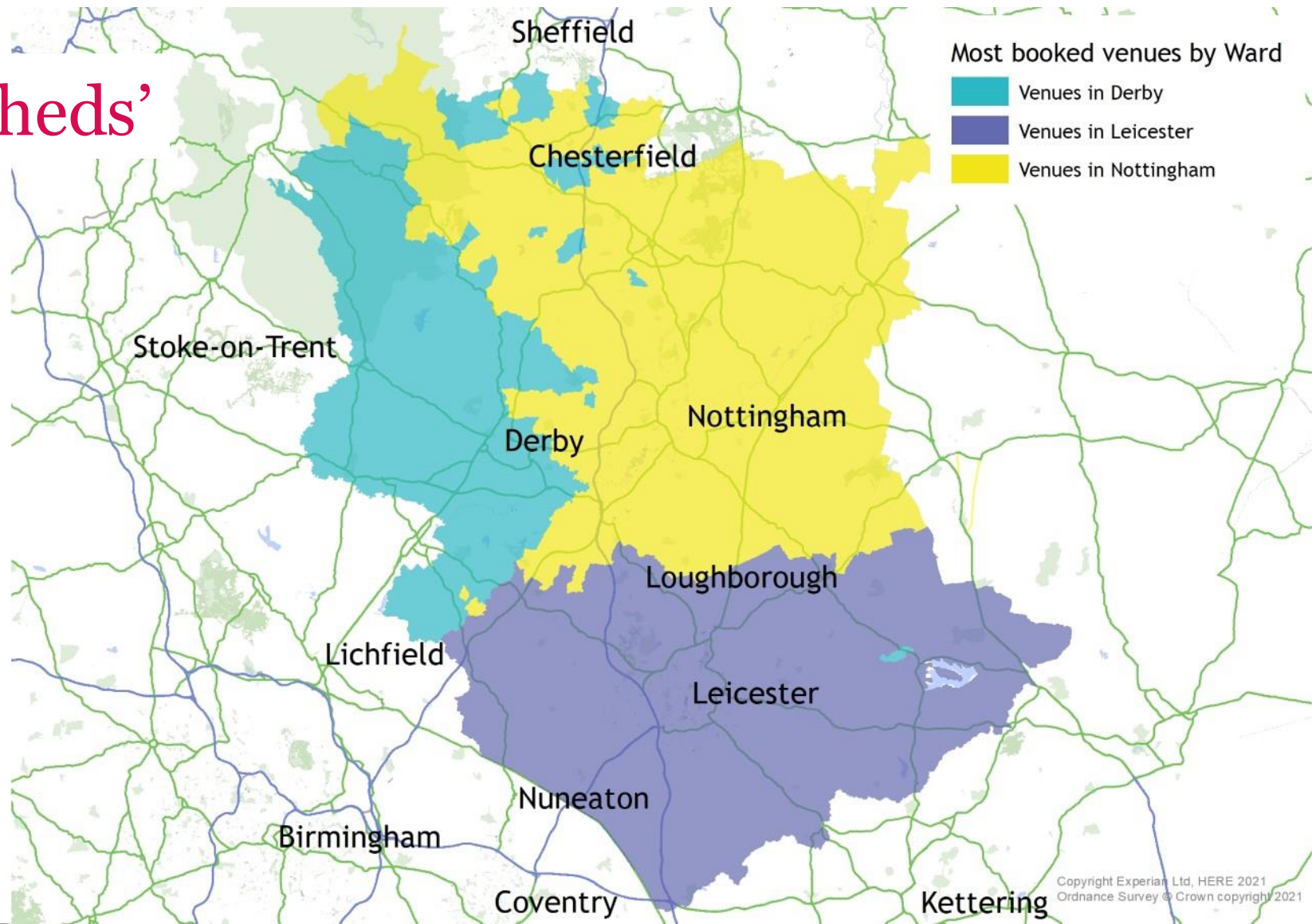


Audience Diversity

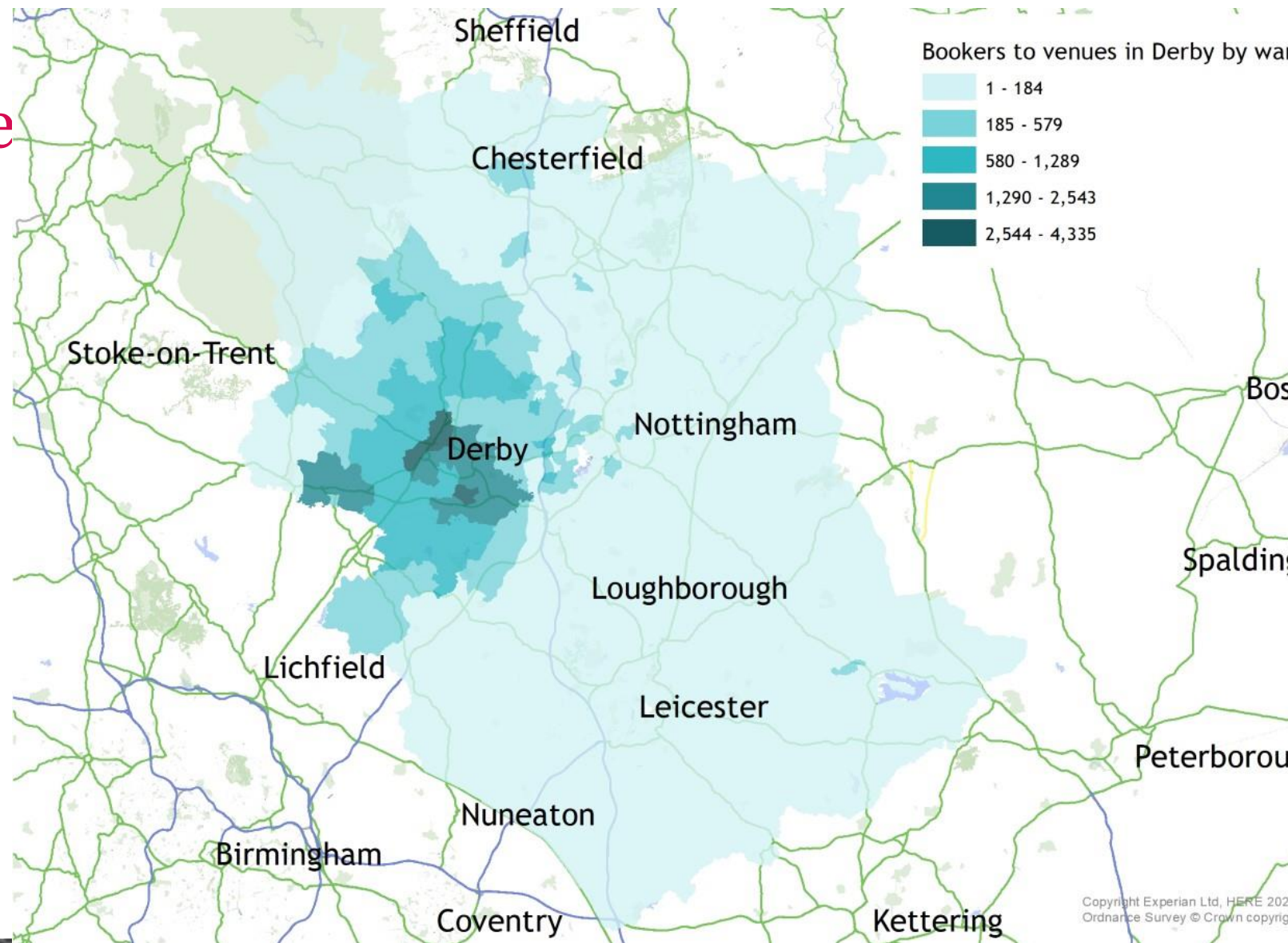


NB the surveys are those across Audience Finder completed by those living within the local authority areas (rather than respondents for *organisations* in those areas).

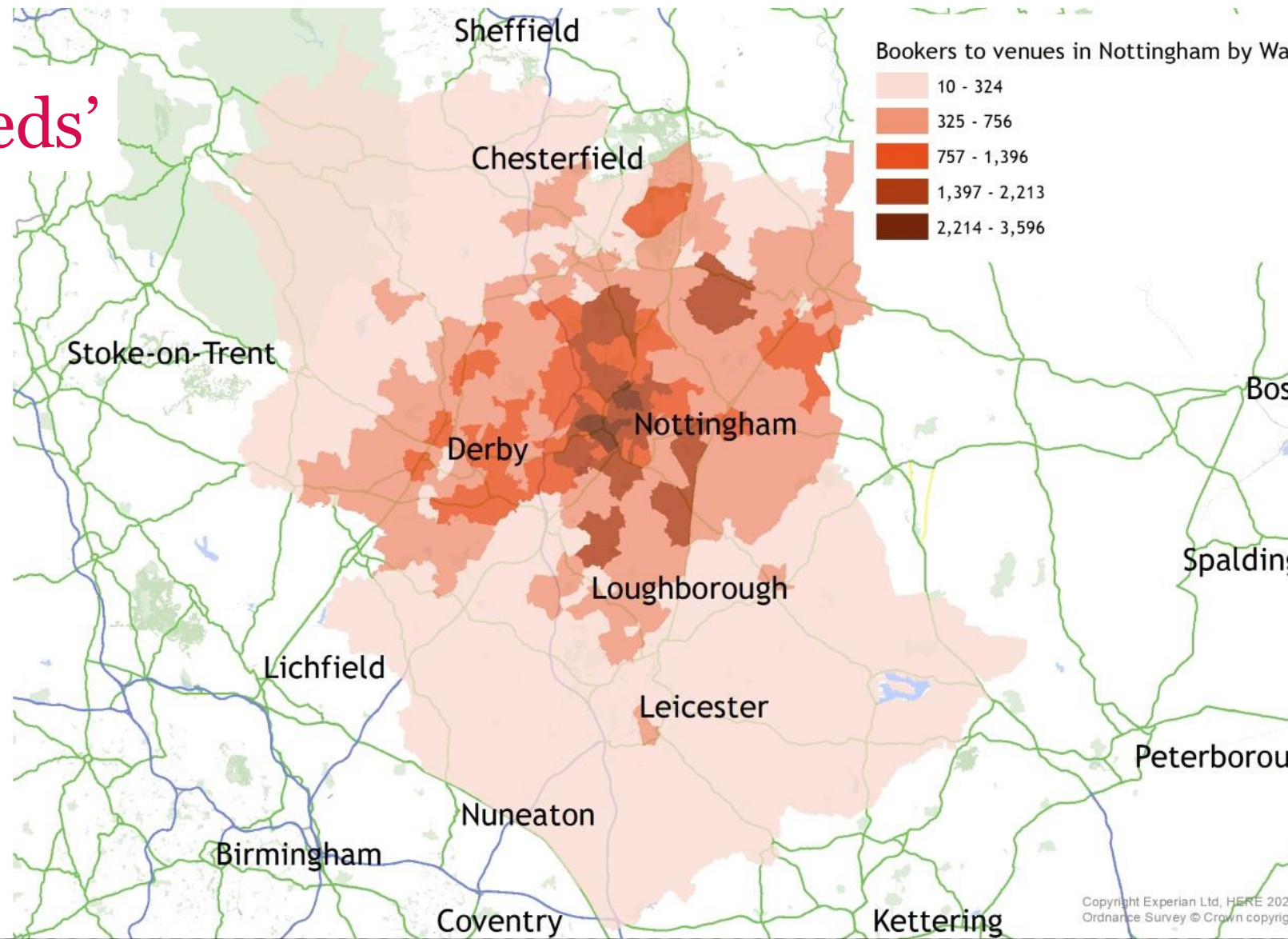
Audience 'Watersheds'



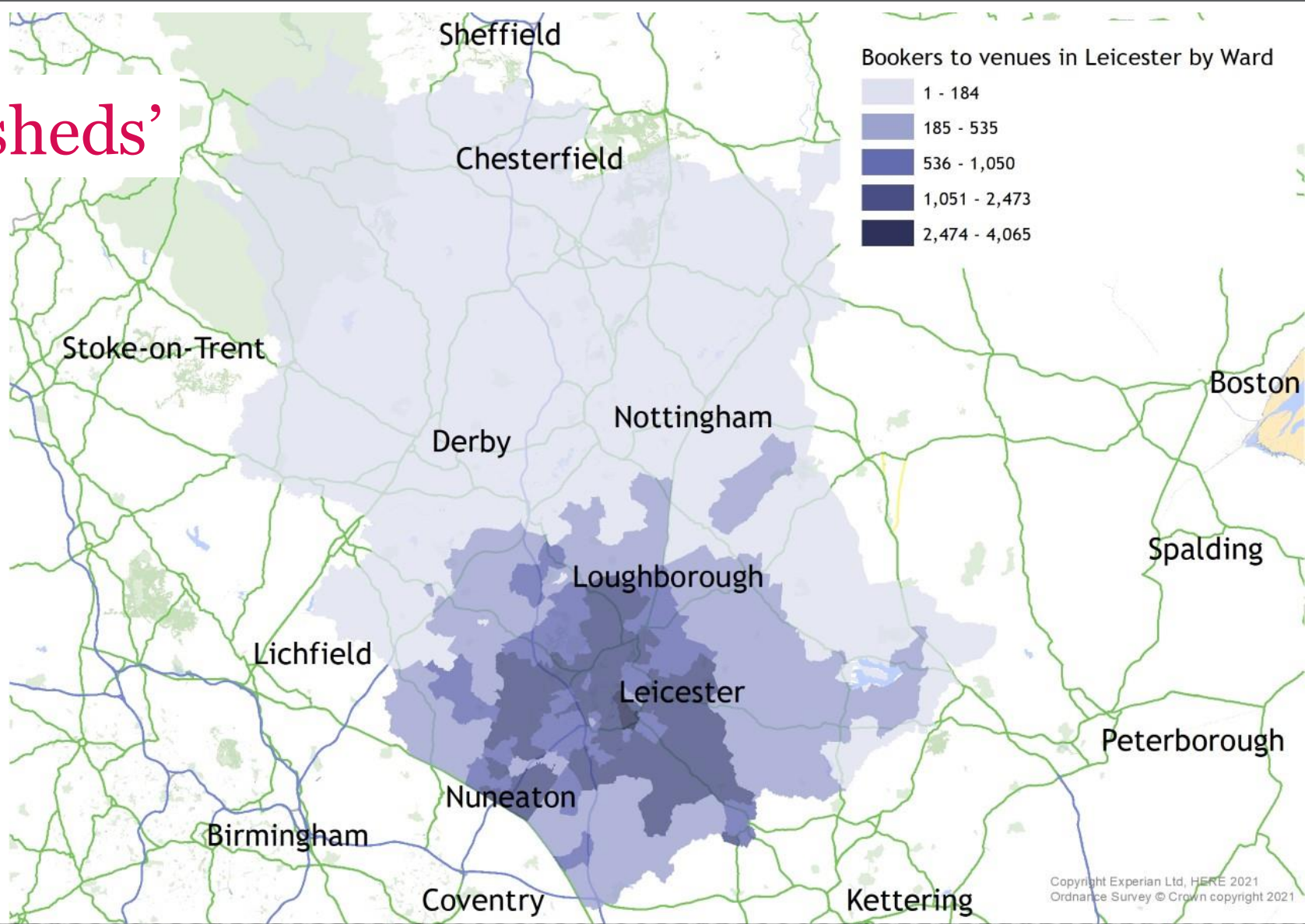
Audience 'Watershe



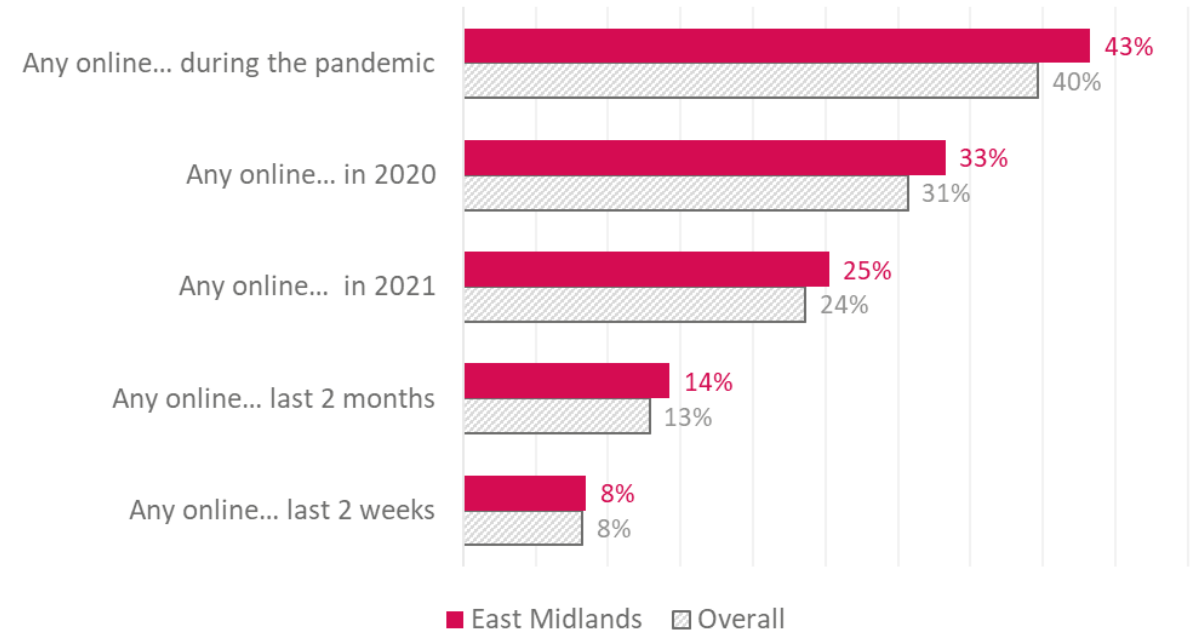
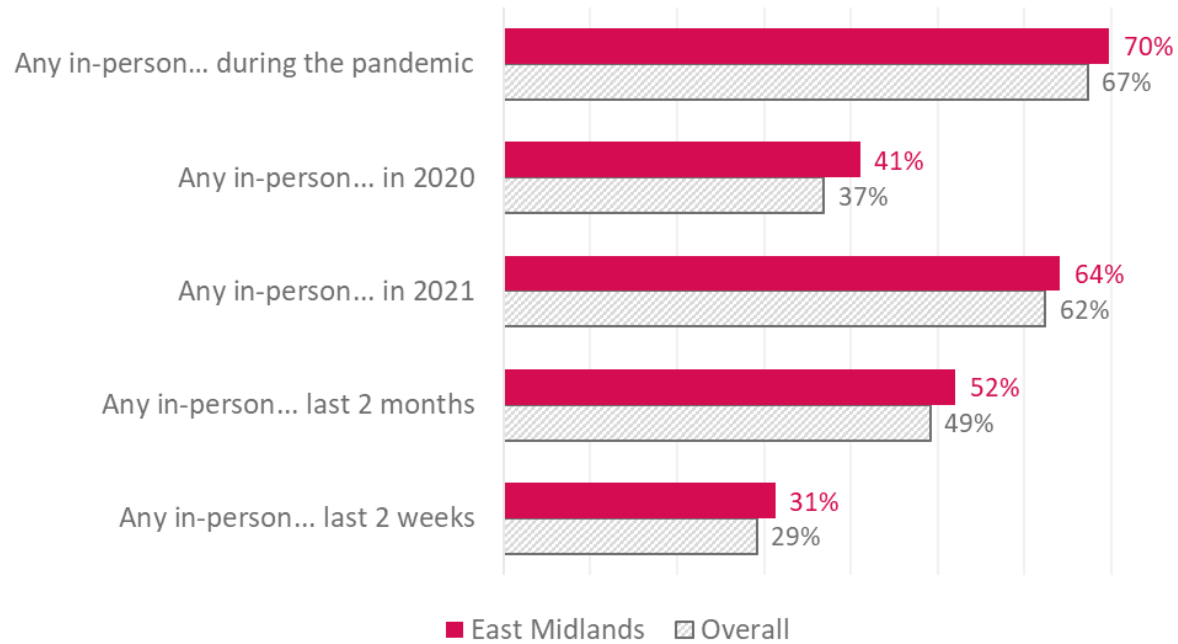
Audience 'Watersheds'



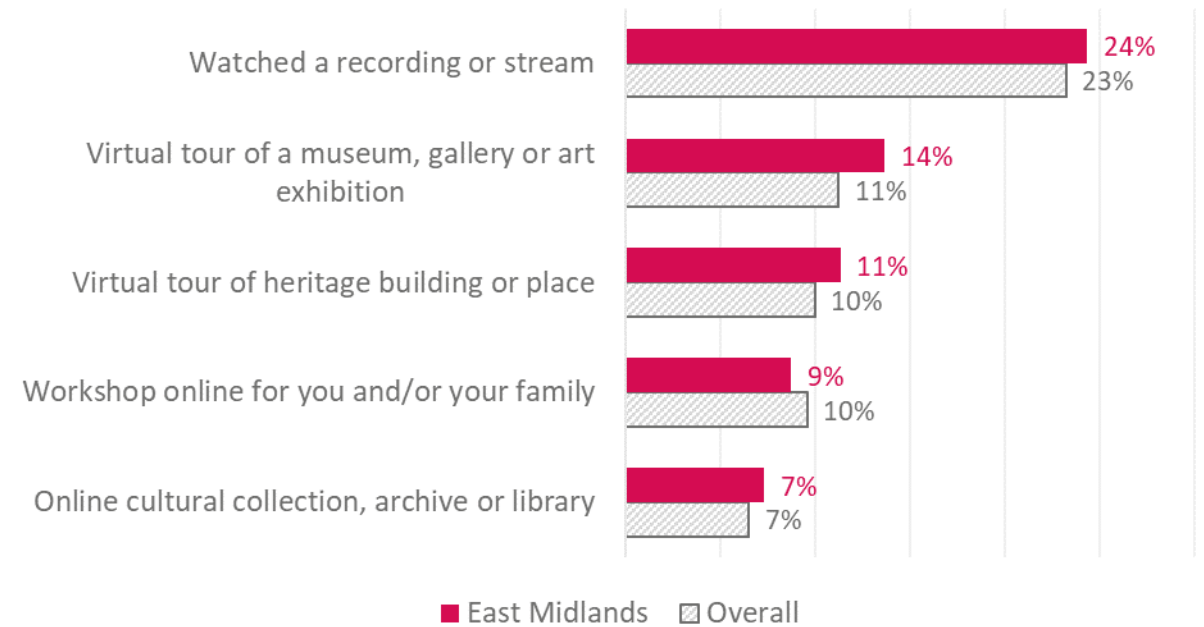
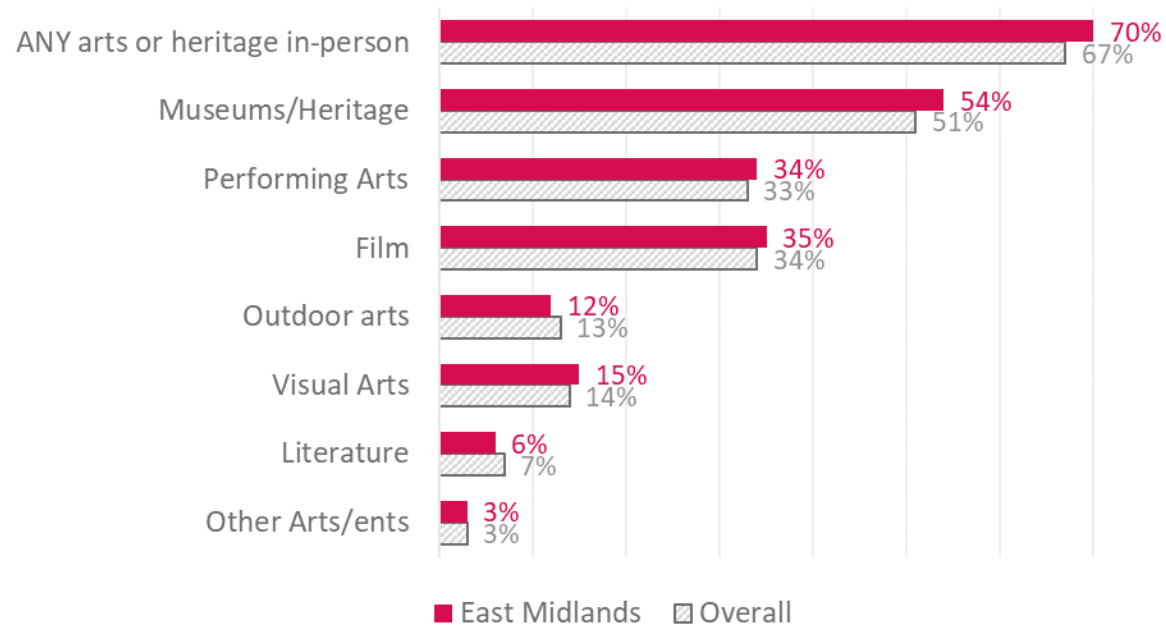
Audience 'Watersheds'



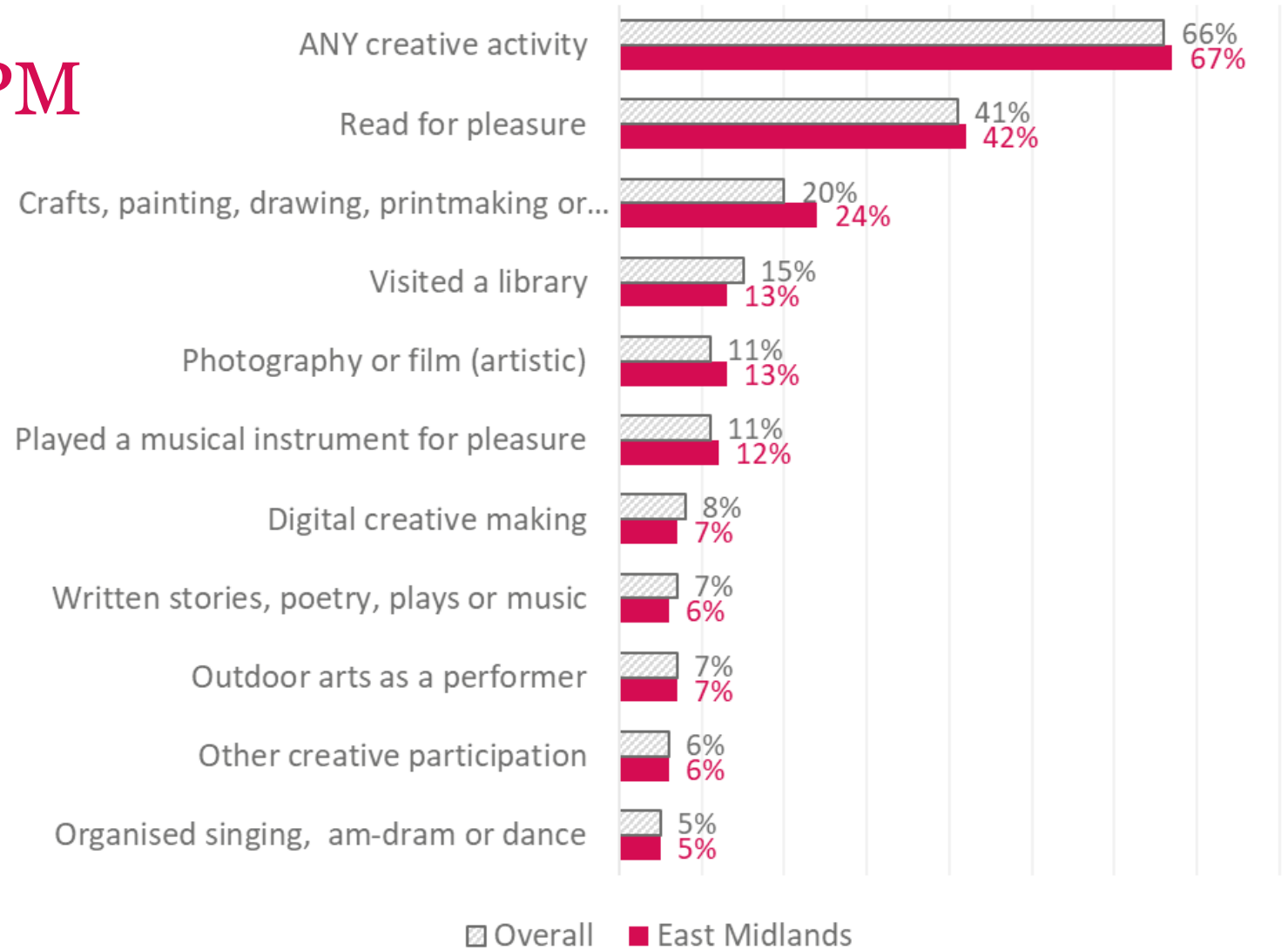
Engagement from CPM



Engagement from CPM

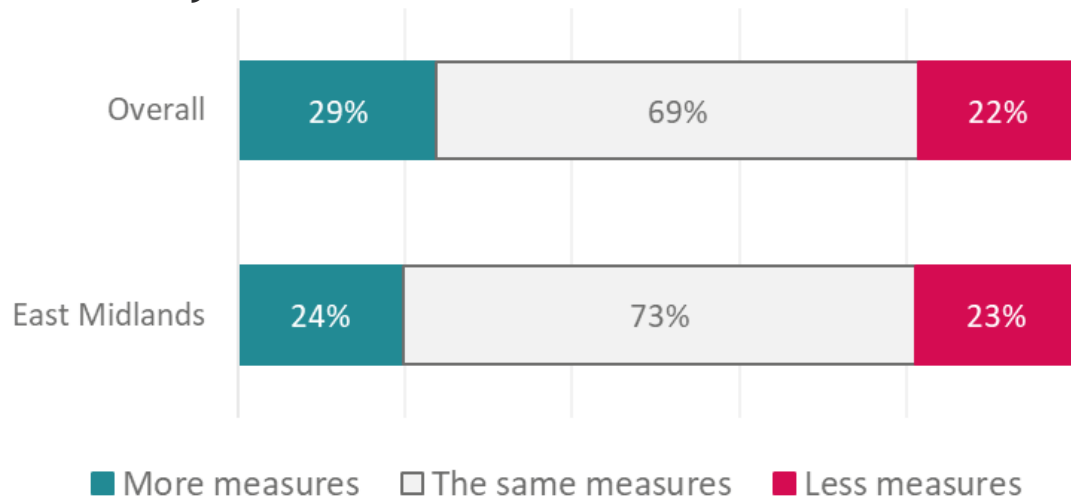


Engagement from CPM

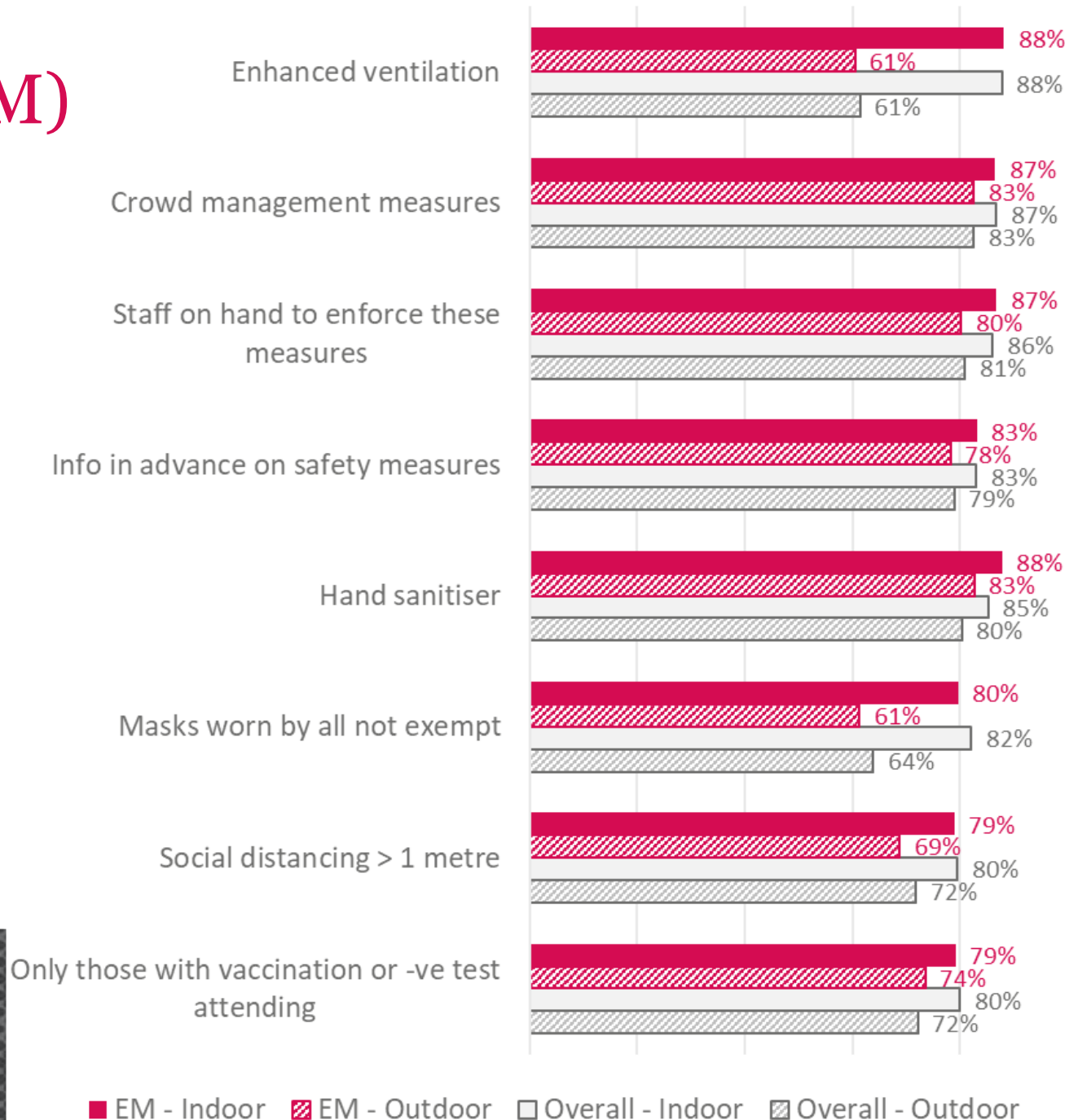


Attitudes to Measures (CPM)

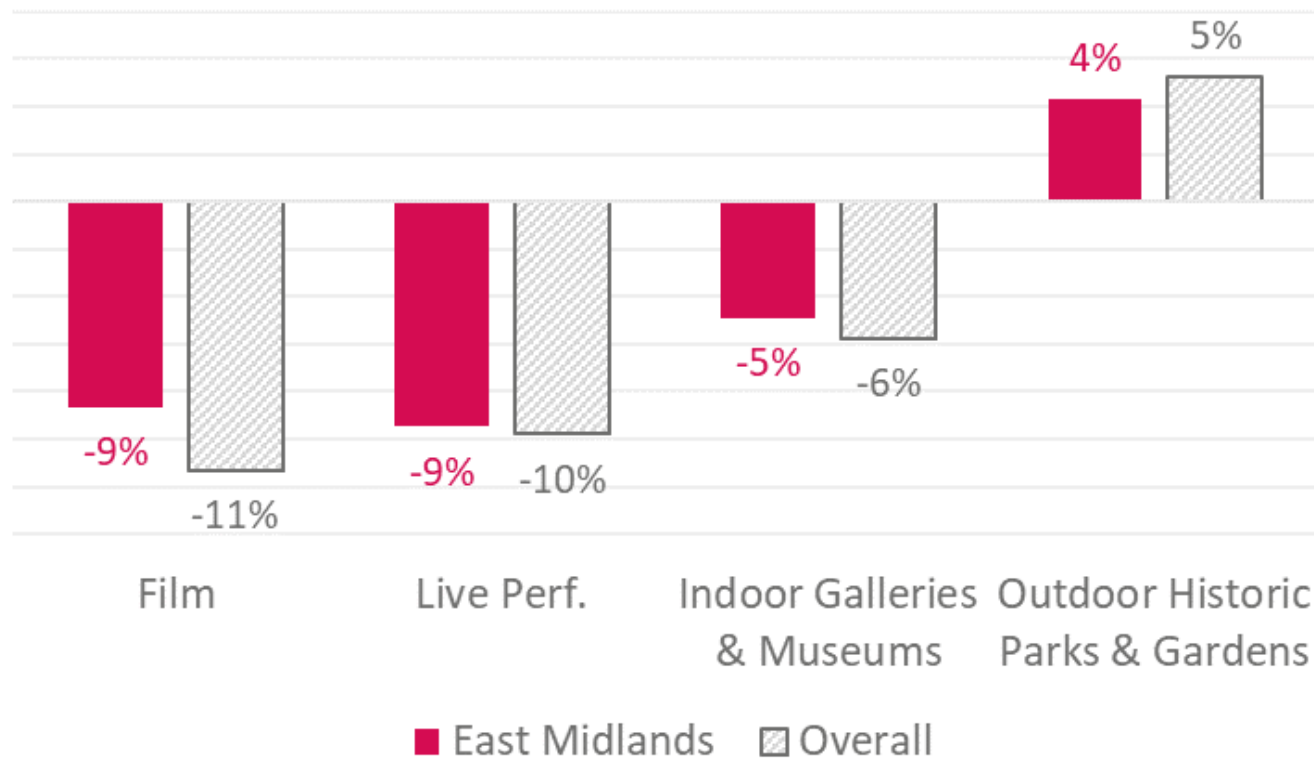
If attending again, would you want...?



% 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:

- A few key Audience Spectrum groups (DD, T&T, UoS, FF)
- Lack of diversity in attenders
- Shift from older -> families
- Nottingham's reach west of the M1
- More engagement during COVID
- Ambivalence re COVID

From Discussion...:

Need to think about long-term support needs for the sector...

...inc. how to invest in, and value, more intensive work with excluded groups (looking beyond footfall/ ticket sales as indicators of success)...

...recognising the value of local publicity (in person, word of mouth, posters in cafes), drawing on health sector practice, as well as digital (which has seen increased donations by value and volume).

Children and families as a key audience (some discussion of whether that's as well as or instead of other work).

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