

Hampshire

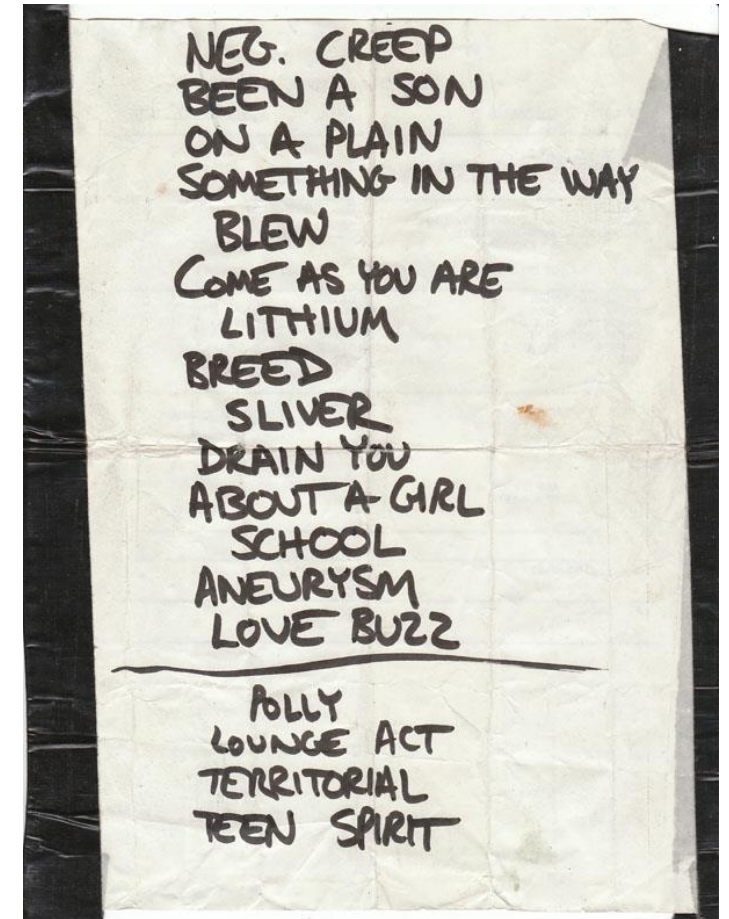
Place Based Insights

Oliver Mantell, Director of Evidence & Insight

Elise Boileau, Evidence & Insight Researcher

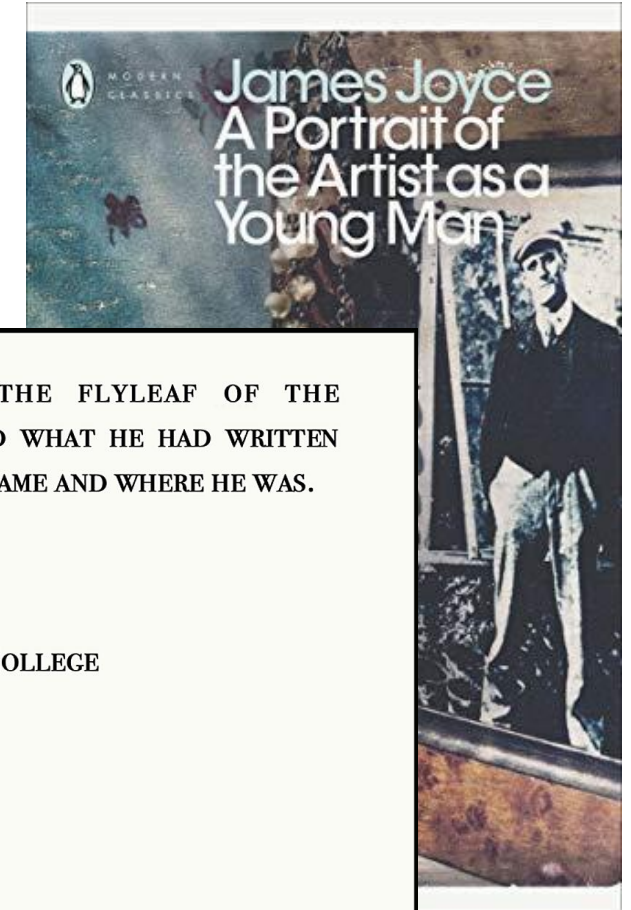
Format of the session

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



Types and Levels of Information

- **Nation:** Cultural Participation Monitor
- **Region:** Cultural Participation Monitor; Audience Spectrum
- **County/subregion:** Audience Finder (ticketing and surveys); Audience Spectrum; Census; TGI
- **Ward:** Audience Finder Ticketing; Area Profile Report+; Audience Spectrum

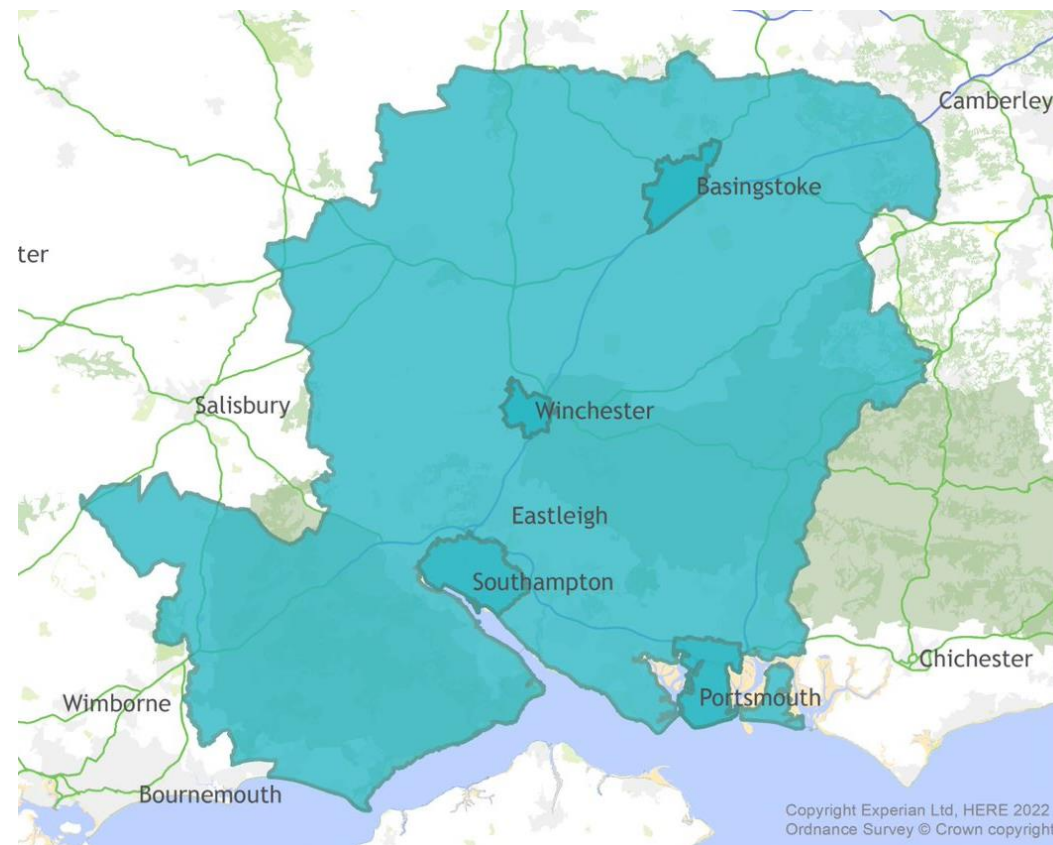


“HE TURNED TO THE FLYLEAF OF THE GEOGRAPHY AND READ WHAT HE HAD WRITTEN THERE: HIMSELF, HIS NAME AND WHERE HE WAS.

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 art 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 natives, they like to 'share' and follow recommendations. They are likely to form key influencers amongst their social circles.

+ Interests

+ Location

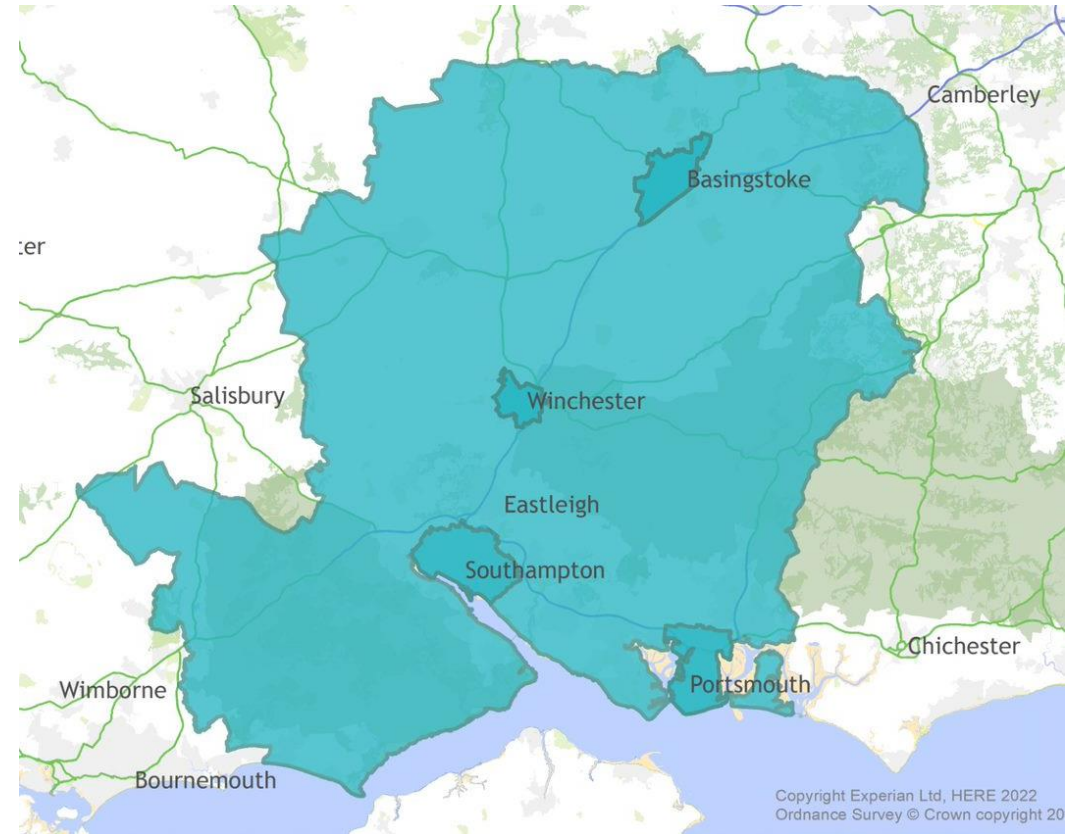
+ Preferences

+ How to engage

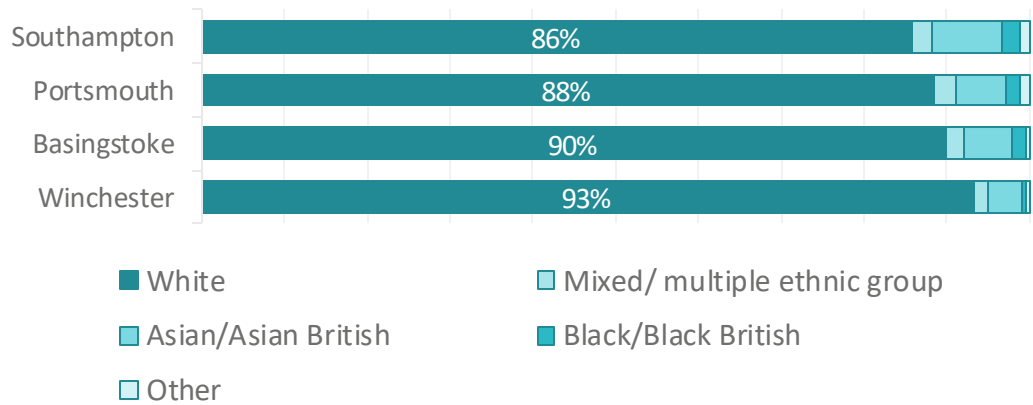
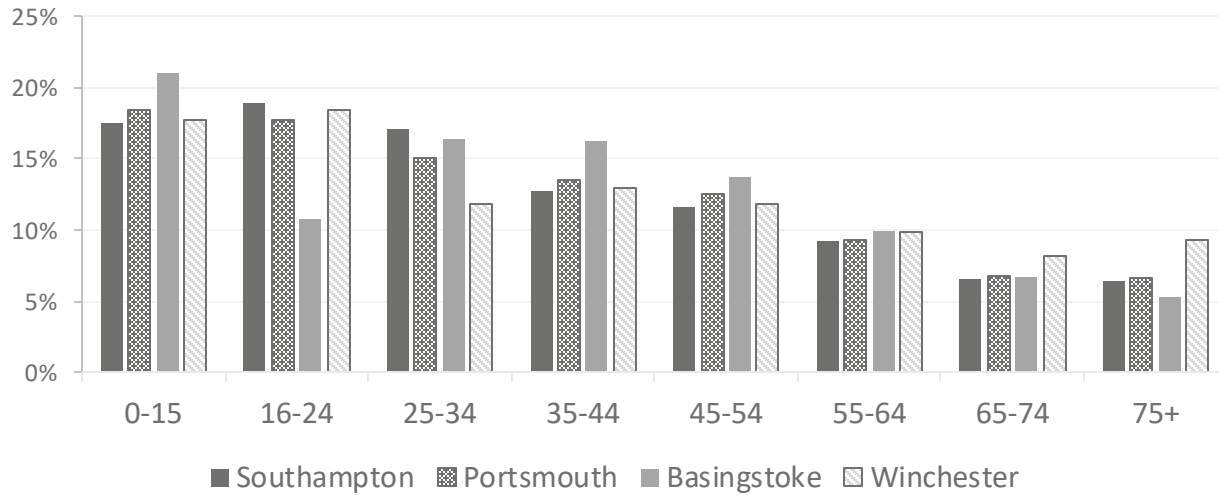
Local Population

Local Area and Population

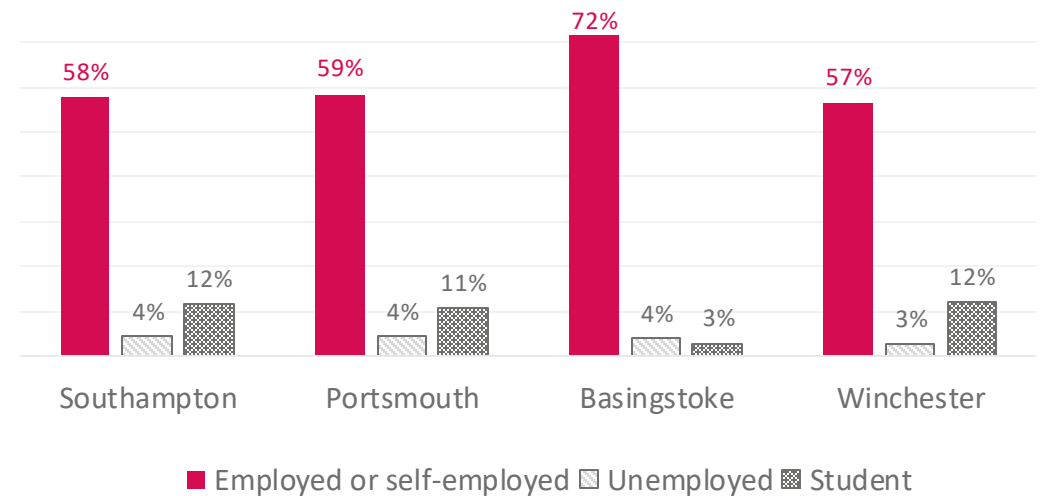
- Overview of demographics
- Audience Spectrum, inc. maps:
 - Largest segment
 - Each of the three largest segments
- Top Lines from Cultural Participation Monitor



Population data – comparing the towns/cities



Population estimate 2020



Population data – comparing the towns/cities

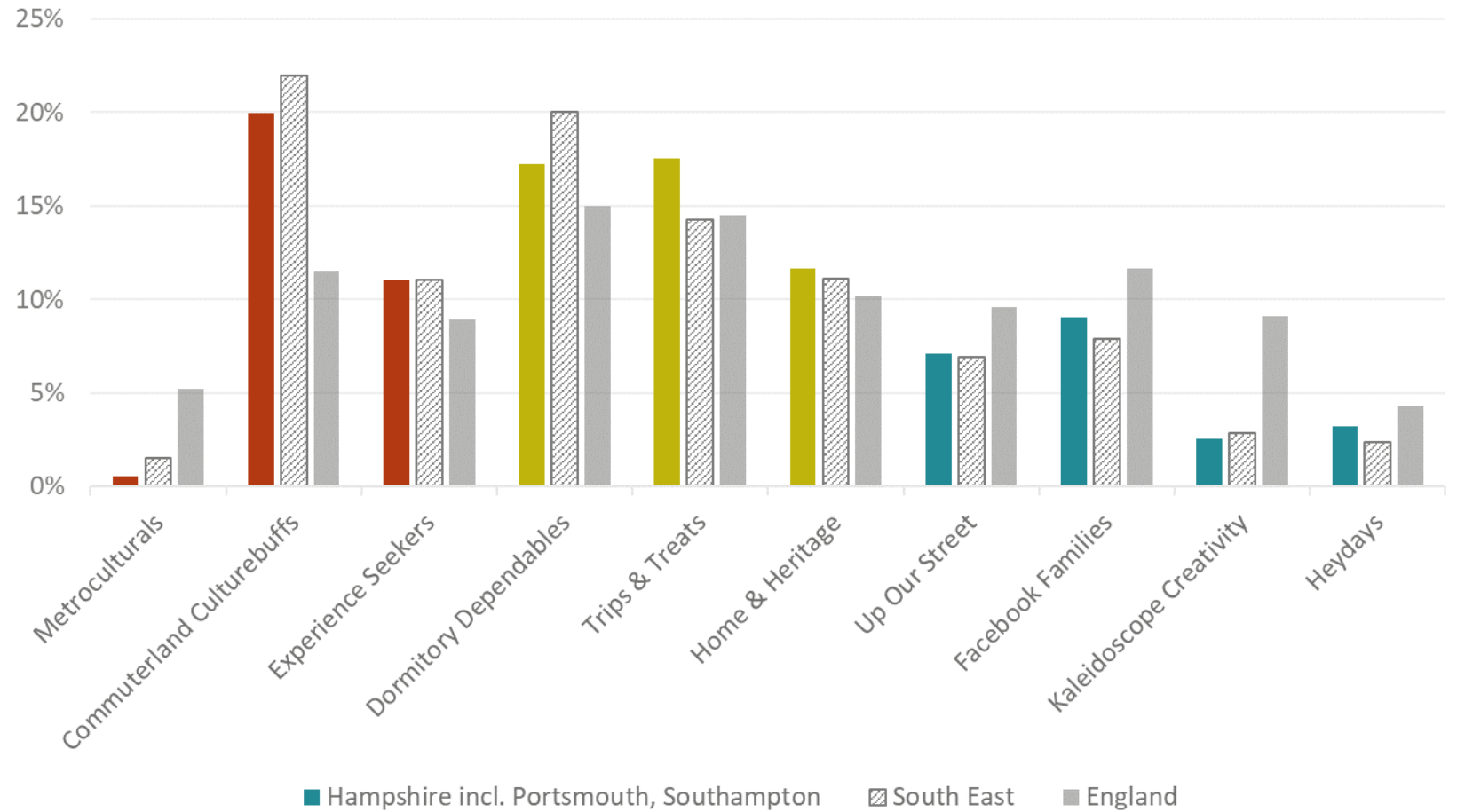
Age	Southampton	Portsmouth	Basingstoke	Winchester
0-15	17%	18%	21%	18%
16-24	19%	18%	11%	18%
25-34	17%	15%	16%	12%
35-44	13%	13%	16%	13%
45-54	12%	13%	14%	12%
55-64	9%	9%	10%	10%
65-74	7%	7%	7%	8%
75+	6%	7%	5%	9%

Population	Estimate 2020
Southampton	260,429
Portsmouth	219,220
Basingstoke	107,929
Winchester	45,695

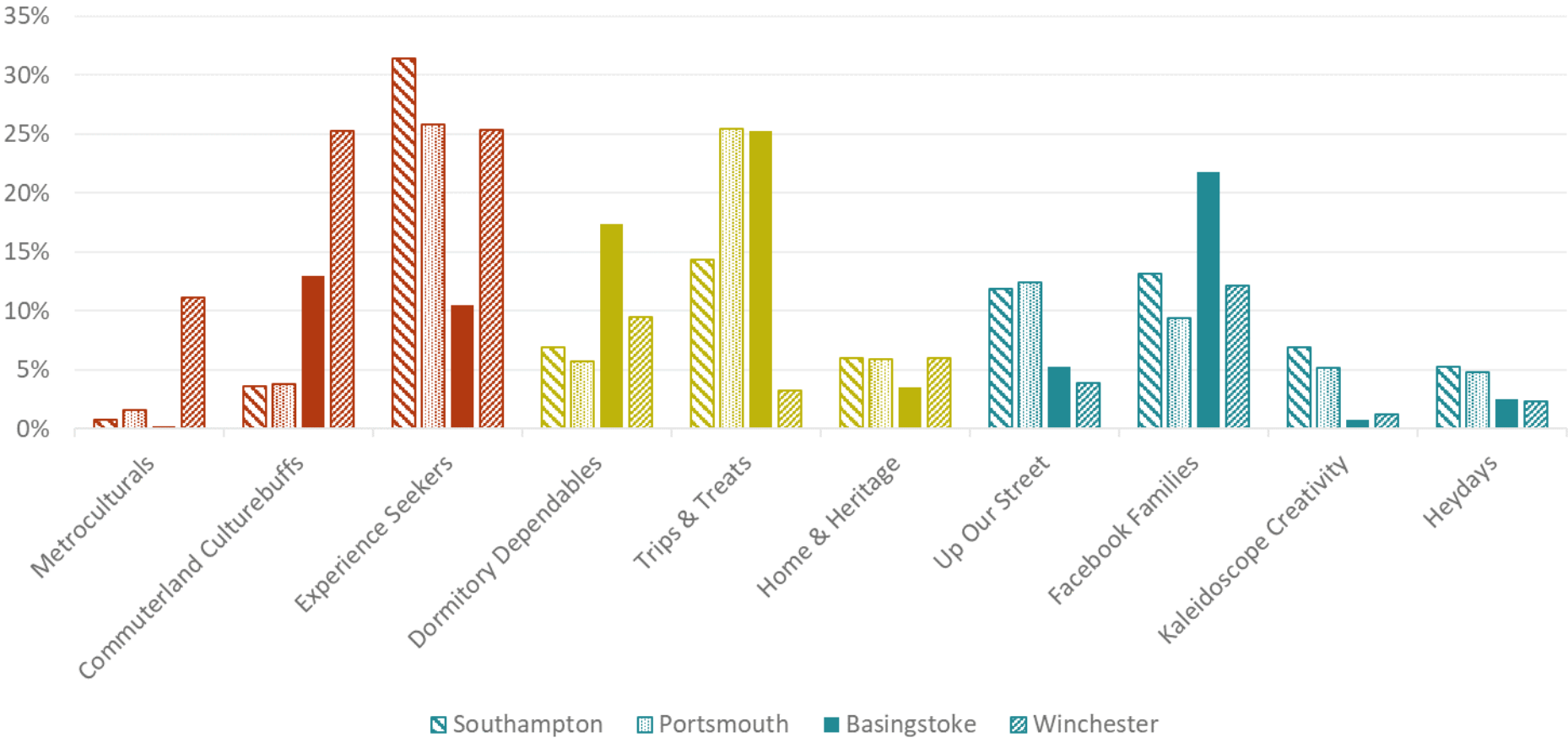
Ethnicity	So'ton	Portsmouth	Basingstoke	Winchester
White	86%	88%	90%	93%
Mixed/ multiple ethnic group	2%	3%	2%	2%
Asian/Asian British	8%	6%	6%	4%
Black/Black British	2%	2%	2%	1%
Other	1%	1%	0%	0%

Occupation	So'ton	Portsmouth	Basingstoke	Winchester
Employed or self-employed	58%	59%	72%	57%
Unemployed	4%	4%	4%	3%
Student	12%	11%	3%	12%

Overall Population Audience Spectrum Profile



Population data – comparing the towns/cities



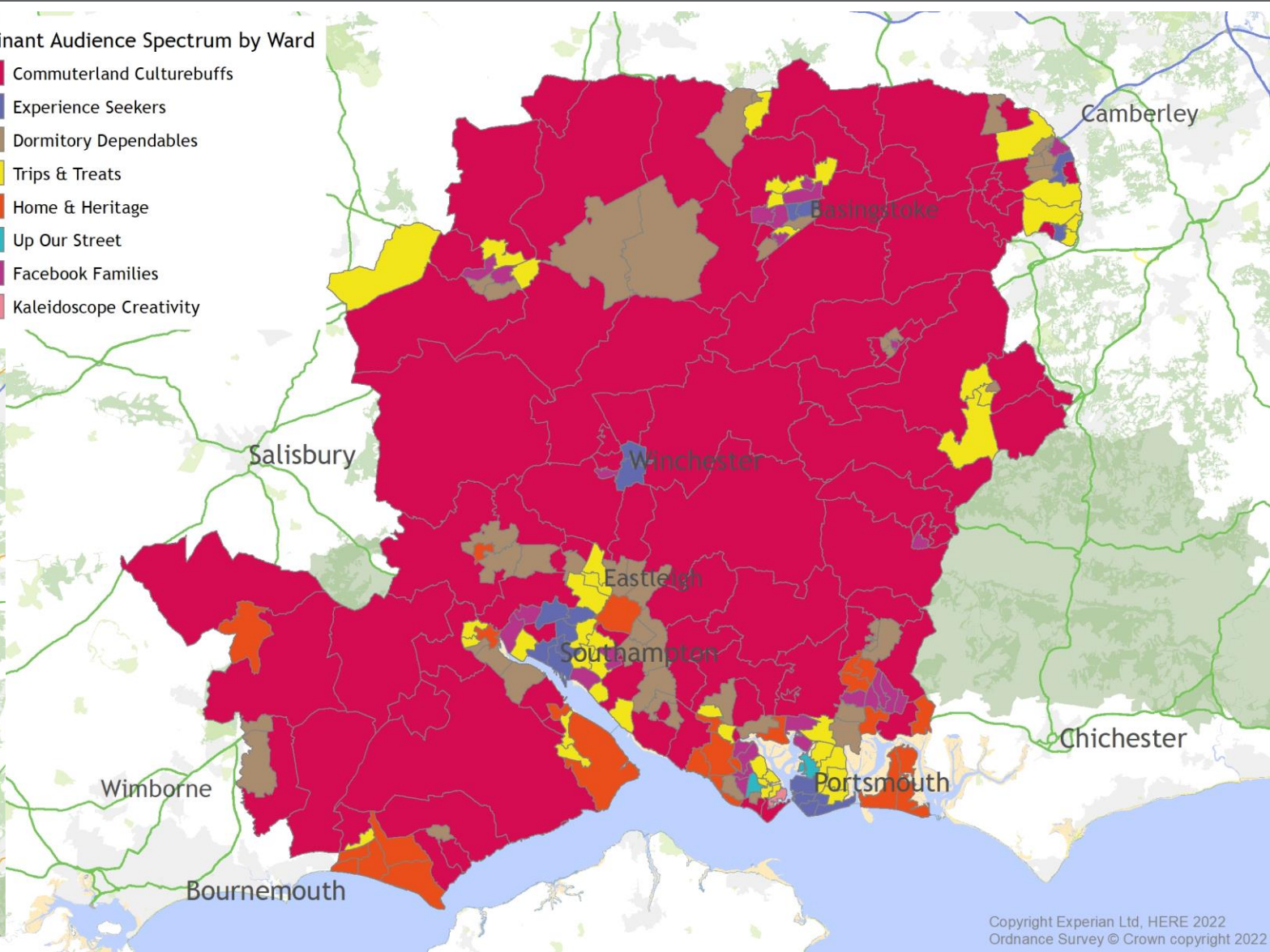
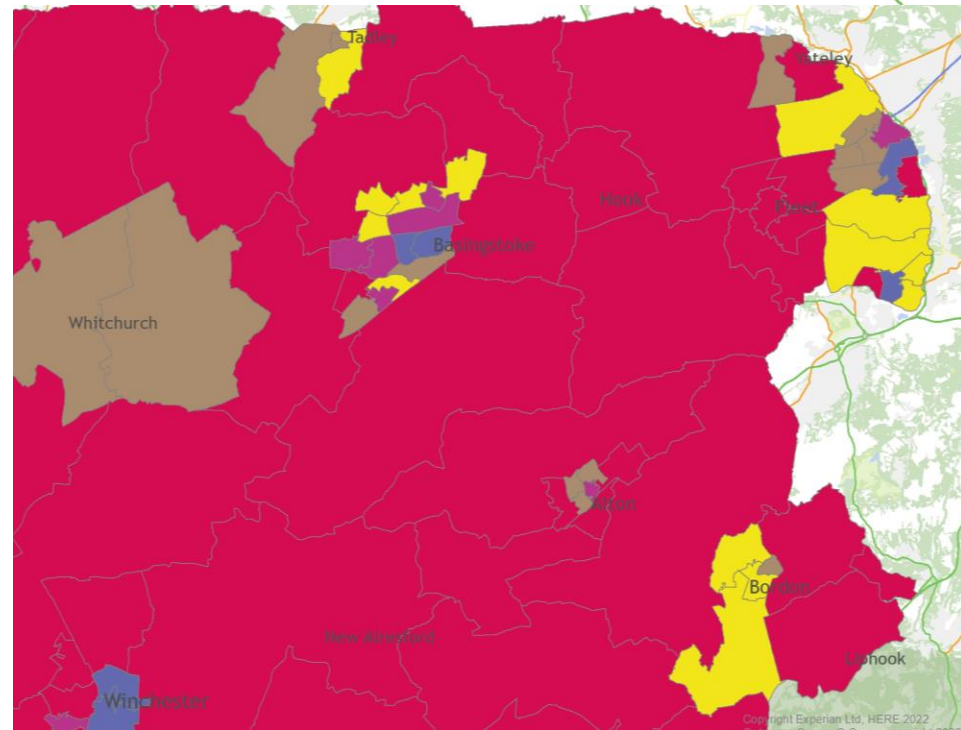
Overall Population Audience Spectrum Profile

Audience Spectrum Segment (population aged 15 +)	Southampton	Portsmouth	Basingstoke	Winchester	Hants inc. Portsmouth, Southampton	South East region	England
Metroculturals	1%	2%	0%	11%	1%	2%	5%
Commuterland Culturebuffs	4%	4%	13%	25%	20%	22%	12%
Experience Seekers	31%	26%	10%	25%	11%	11%	9%
Dormitory Dependables	7%	6%	17%	9%	17%	20%	15%
Trips & Treats	14%	25%	25%	3%	18%	14%	14%
Home & Heritage	6%	6%	4%	6%	12%	11%	10%
Up Our Street	12%	12%	5%	4%	7%	7%	10%
Facebook Families	13%	9%	22%	12%	9%	8%	12%
Kaleidoscope Creativity	7%	5%	1%	1%	3%	3%	9%
Heydays	5%	5%	3%	2%	3%	2%	4%

Dominant Audience Spectrum Segment by Ward

Dominant Audience Spectrum by Ward

- Commuterland Culturebuffs
- Experience Seekers
- Dormitory Dependables
- Trips & Treats
- Home & Heritage
- Up Our Street
- Facebook Families
- Kaleidoscope Creativity

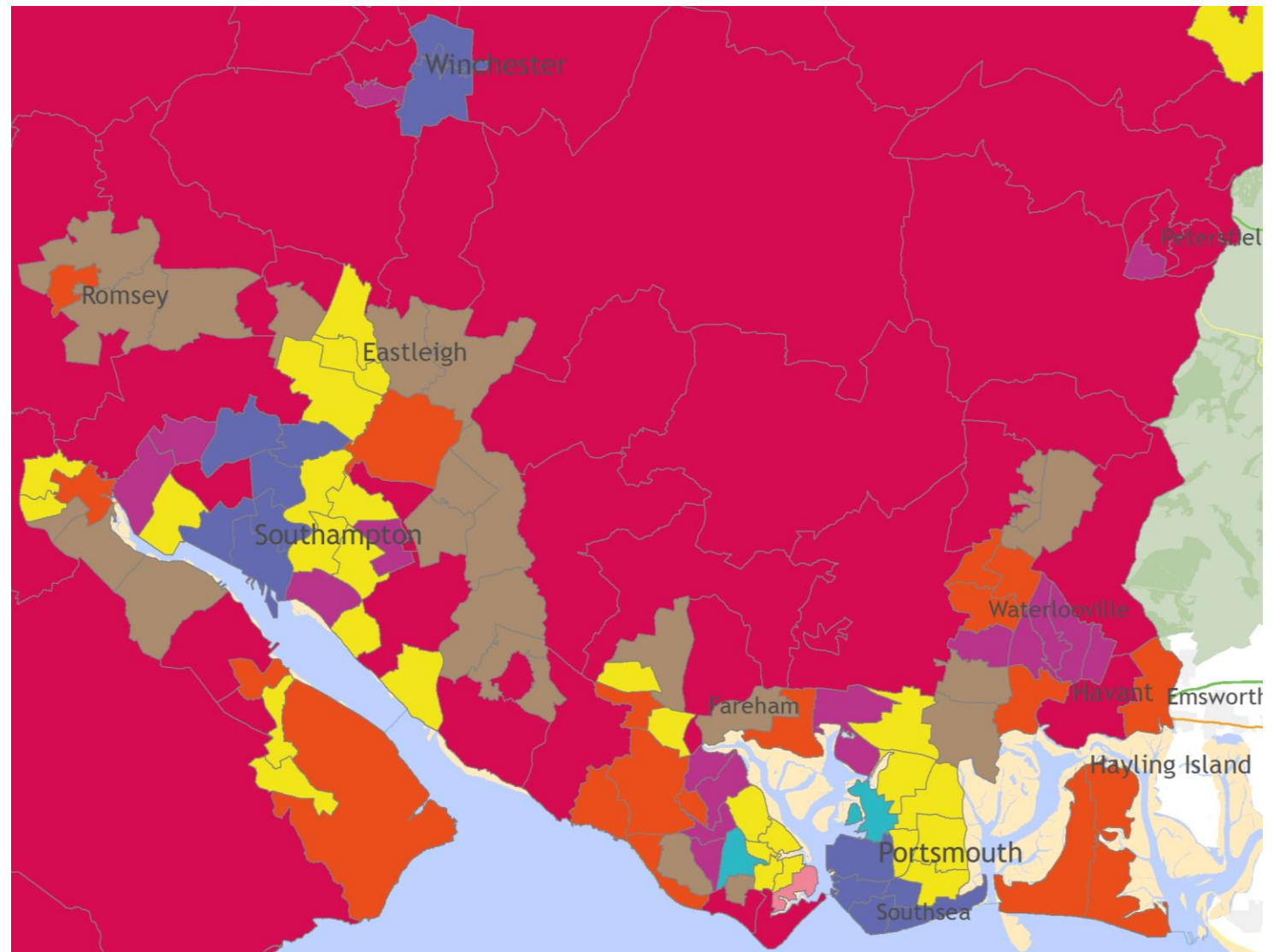


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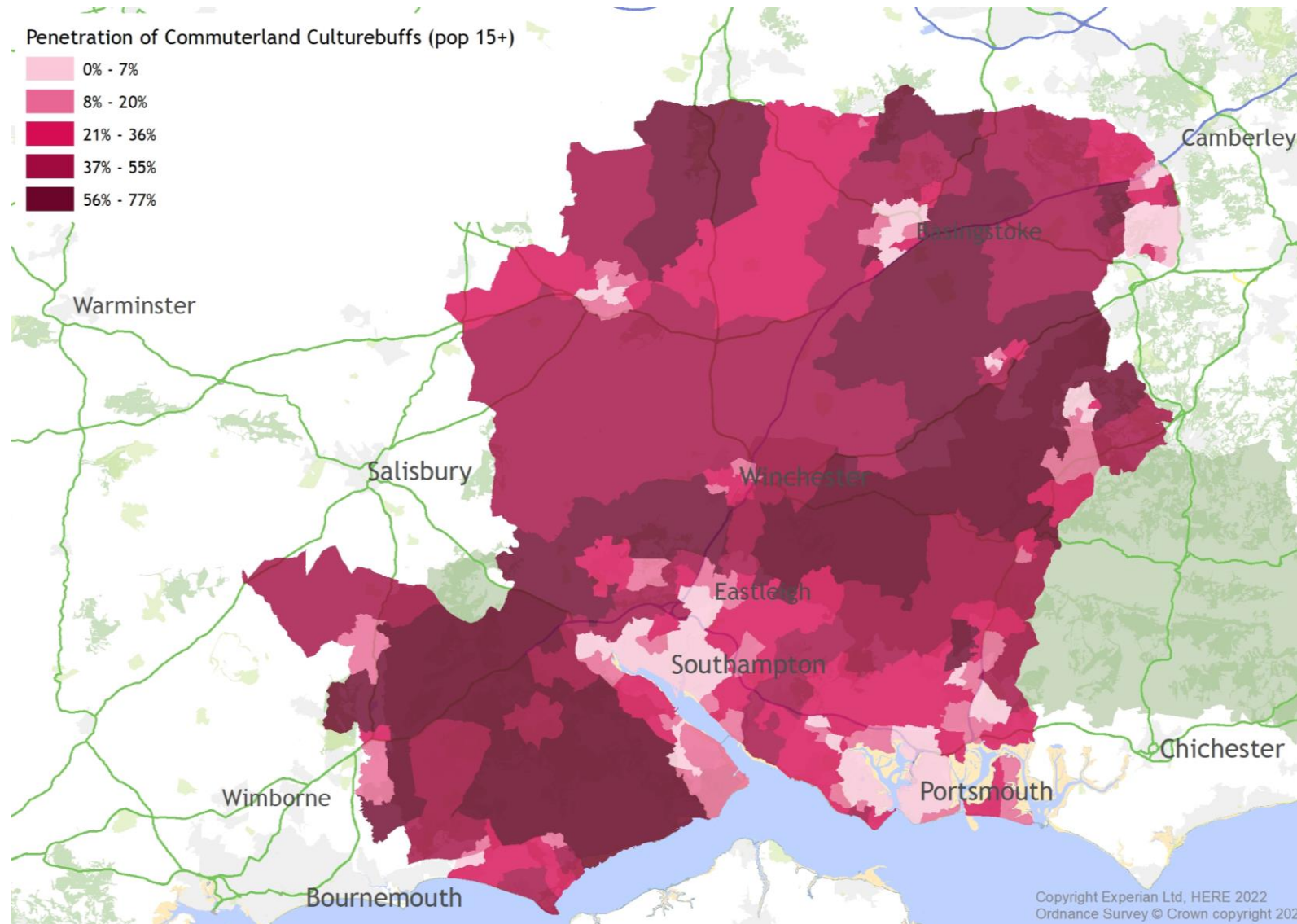
Dominant Audience Spectrum Segment by Ward

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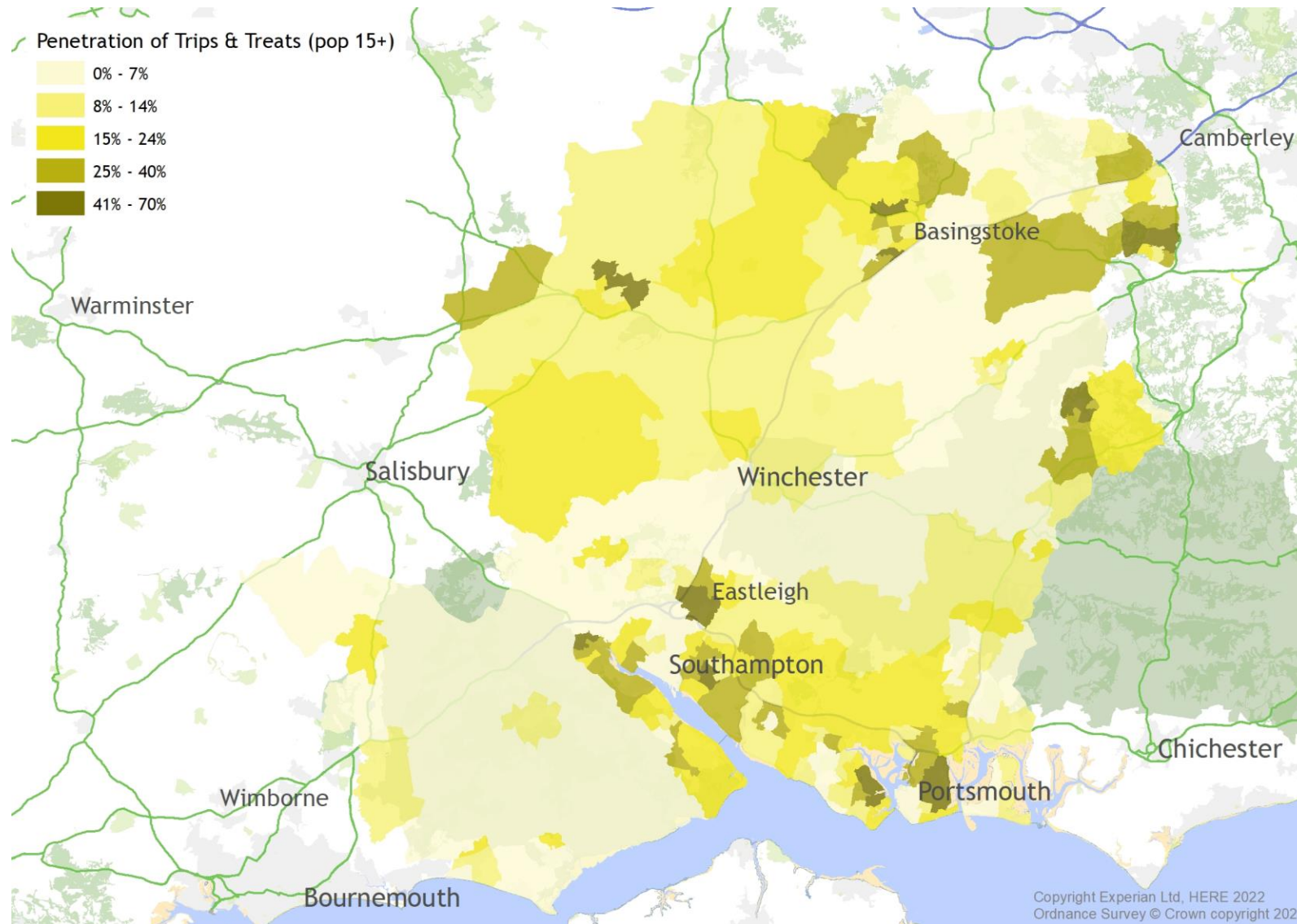
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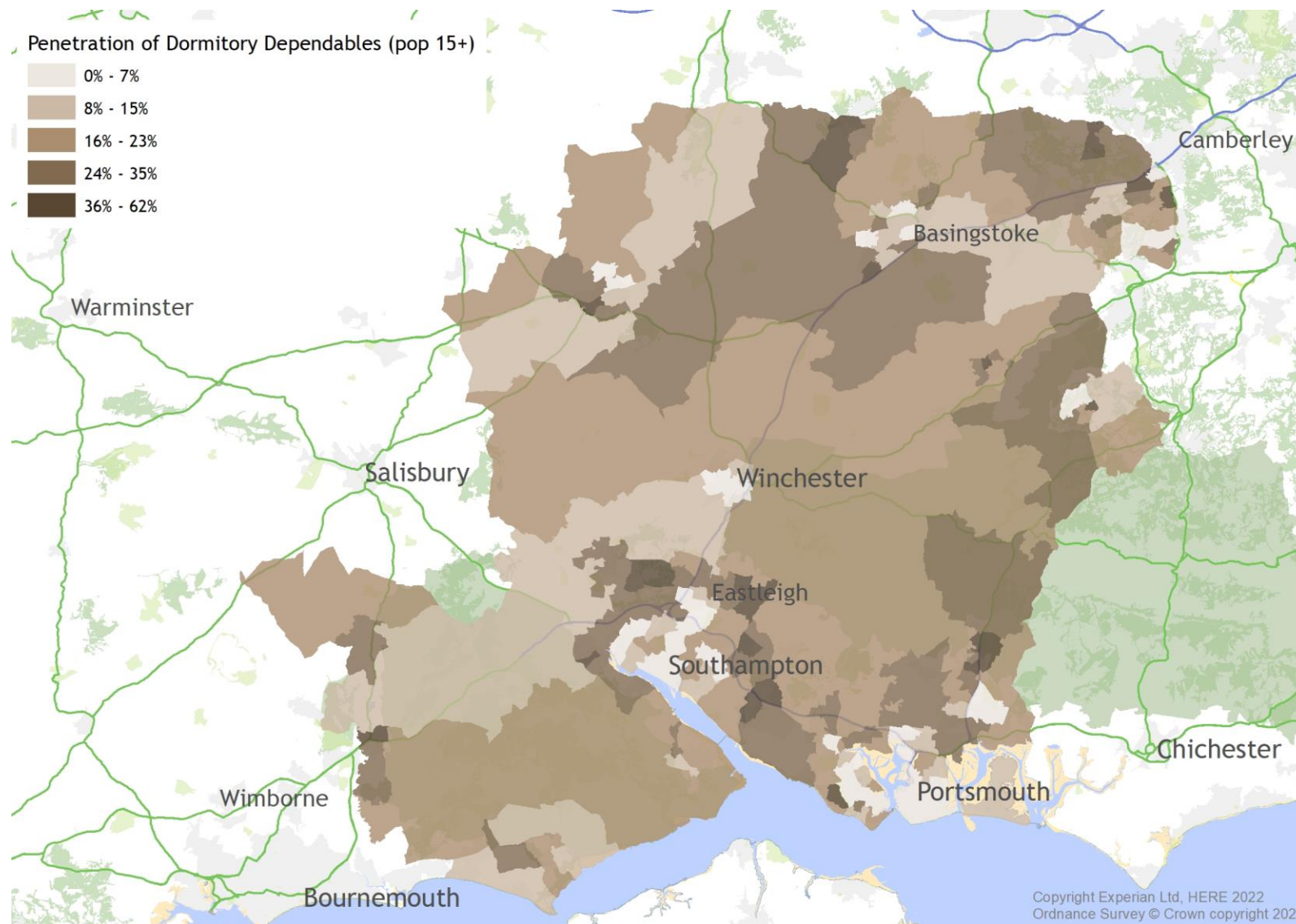
Penetration of Audience Spectrum Population by Ward



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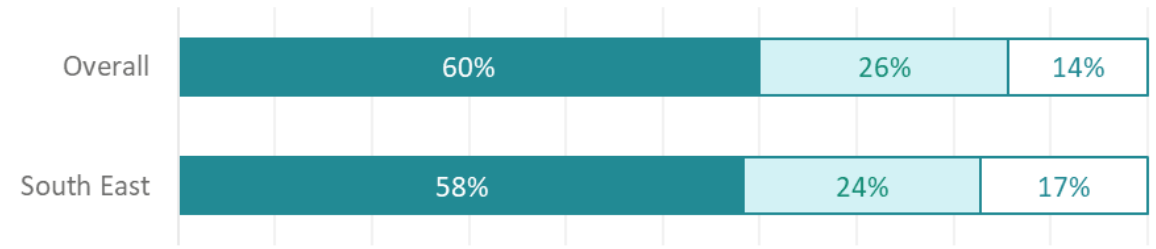
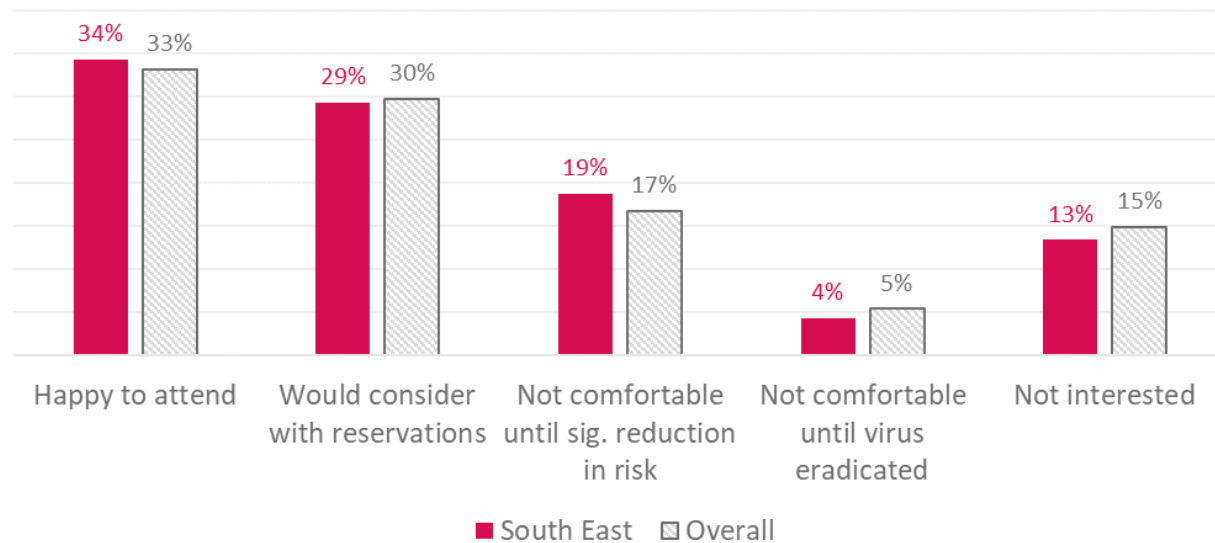


Penetration of Audience Spectrum Population by Ward



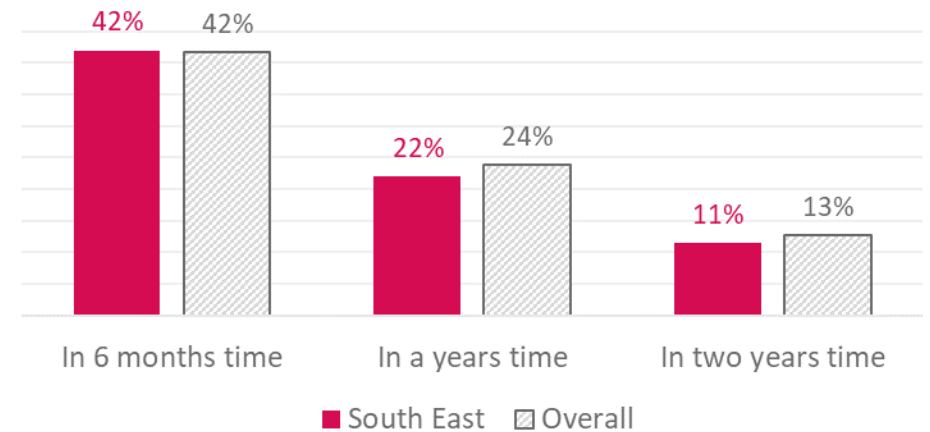
Top Lines from Cultural Participation Monitor

Generally in line, or less concerned, than the overall population.



- 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

Sales and Profile

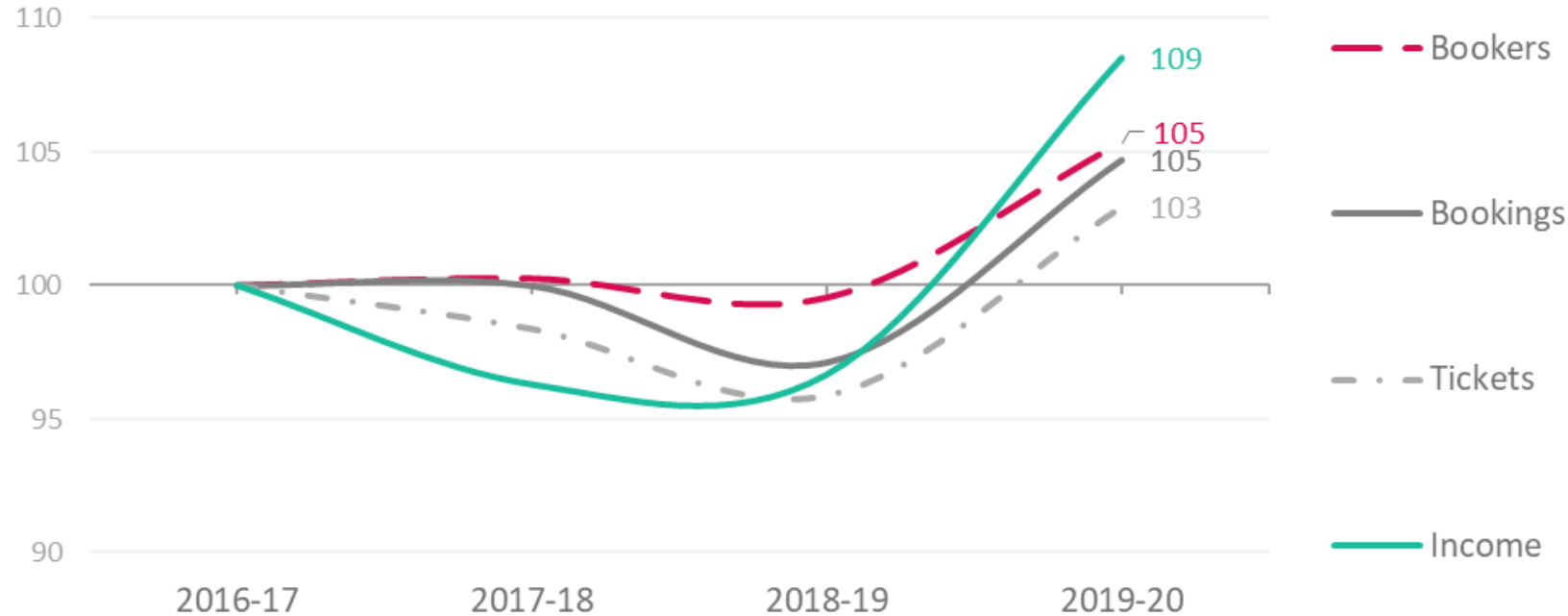
About Local Audiences

Audience Finder ticketing:

	16/17	19/20	Increase
Bookers	172k	182k	3k
Bookings	389k	407k	18k
Tickets	1.05M	1.08M	30k
Income	£26.3M	£28.5M	£2.2M

Sales Trends

Sales trend - index



Based on Hampshire residents across a consistent cohort of Audience Finder venues.

2019/20:

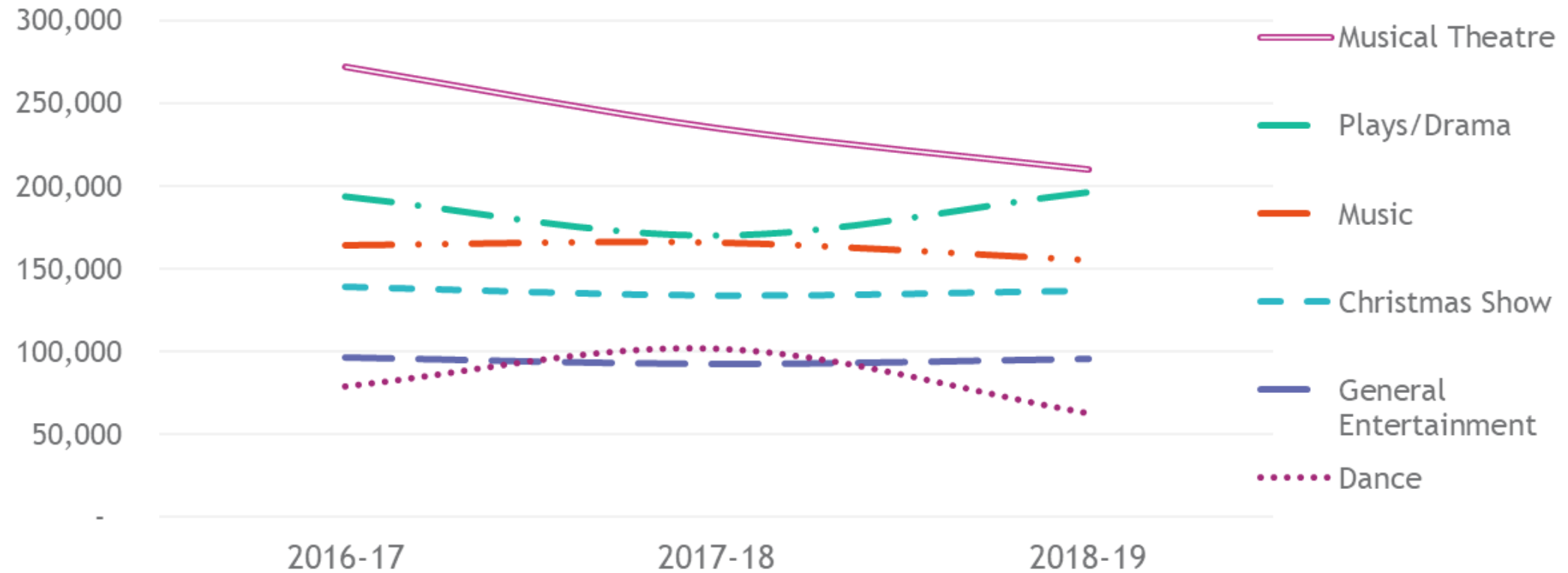
Avg. income/ticket: £26.94, **+6%**

Avg. bookings/booker: 2.2, **-0%**

Avg. tickets/booking: 2.7, **-2%**

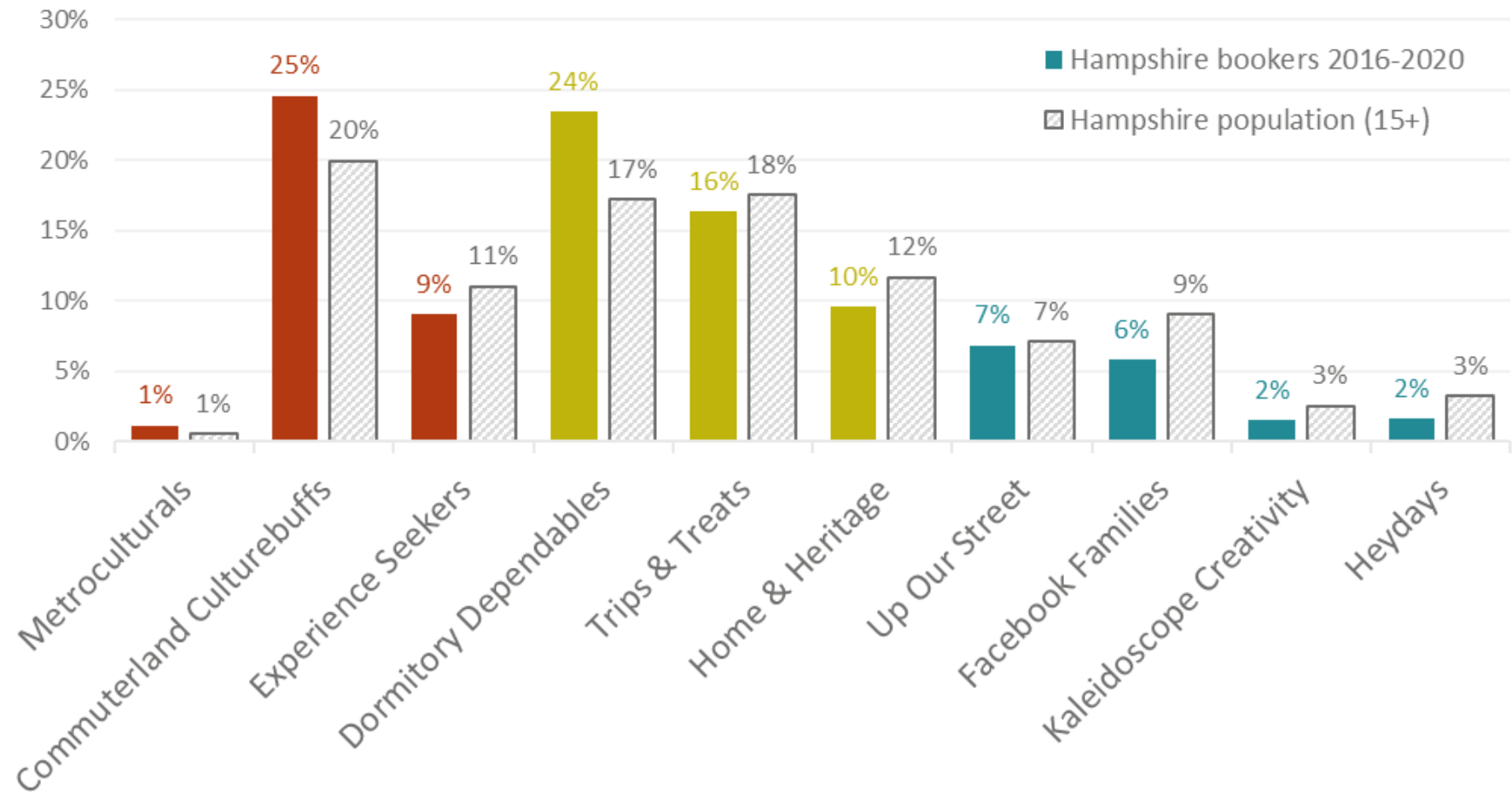
Audience Trends

Ticket sales by year for six most popular artforms



About Local Audiences

Audience Spectrum profile



Audience Trends

Family

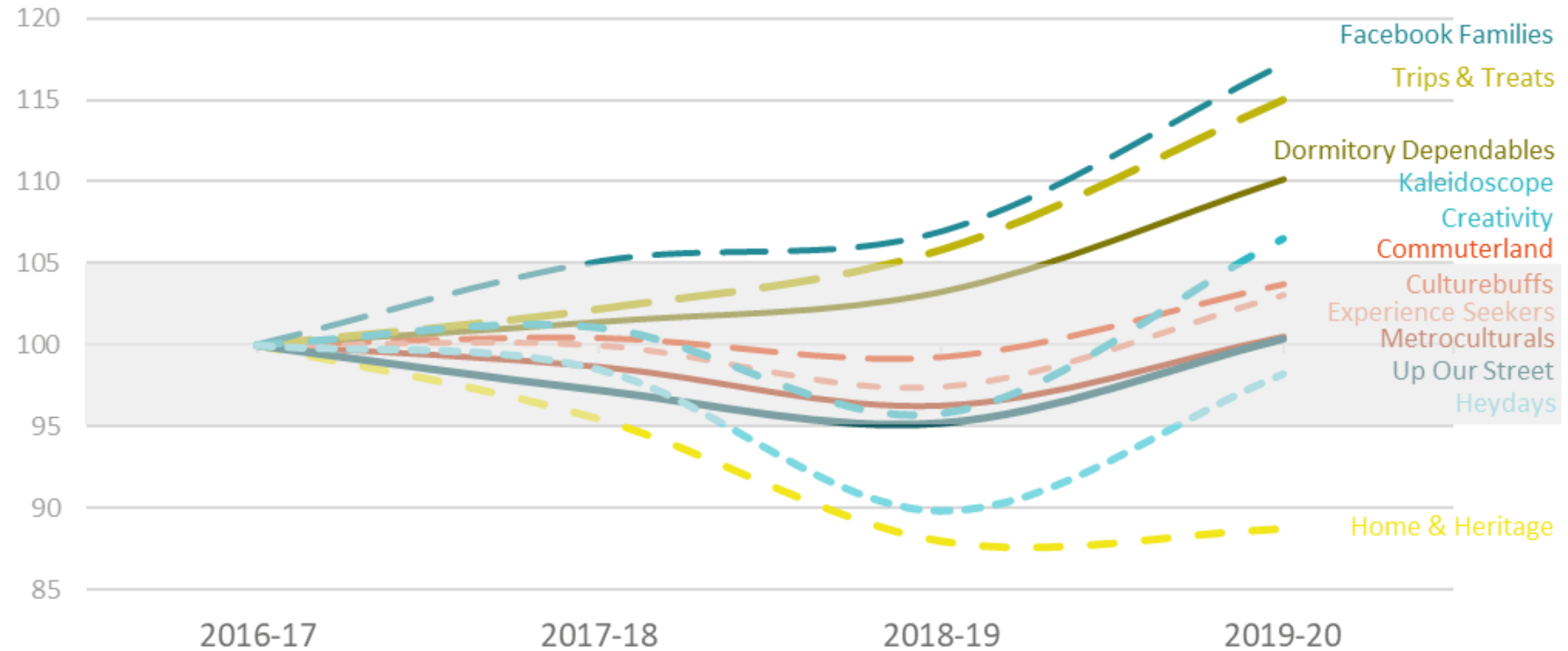


Older

(/Higher-engaged?)



Audience trend - index



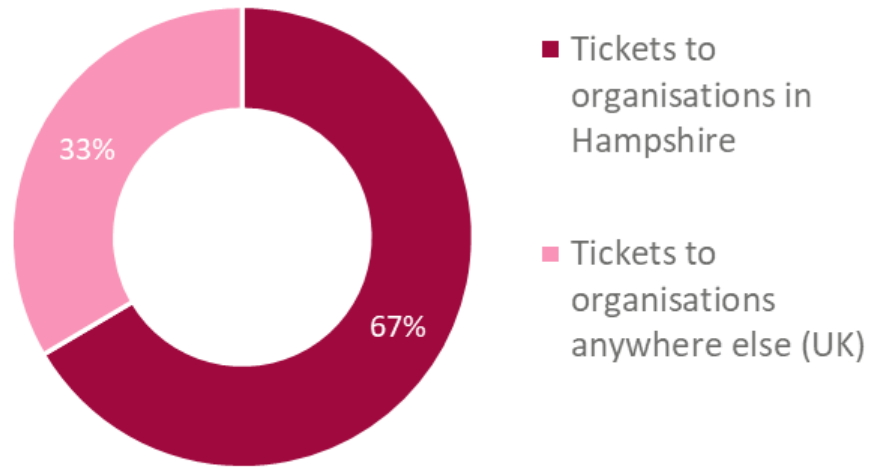
Local Audiences

Geography

Non-Local Audiences

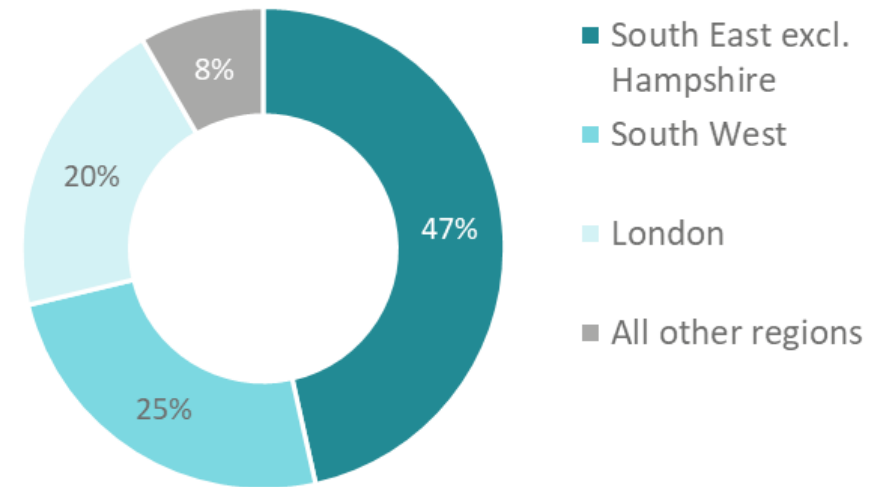
Two thirds of tickets were to organisations in Hampshire

Tickets issued to Hampshire residents, in years 2016-17 to 2019-20



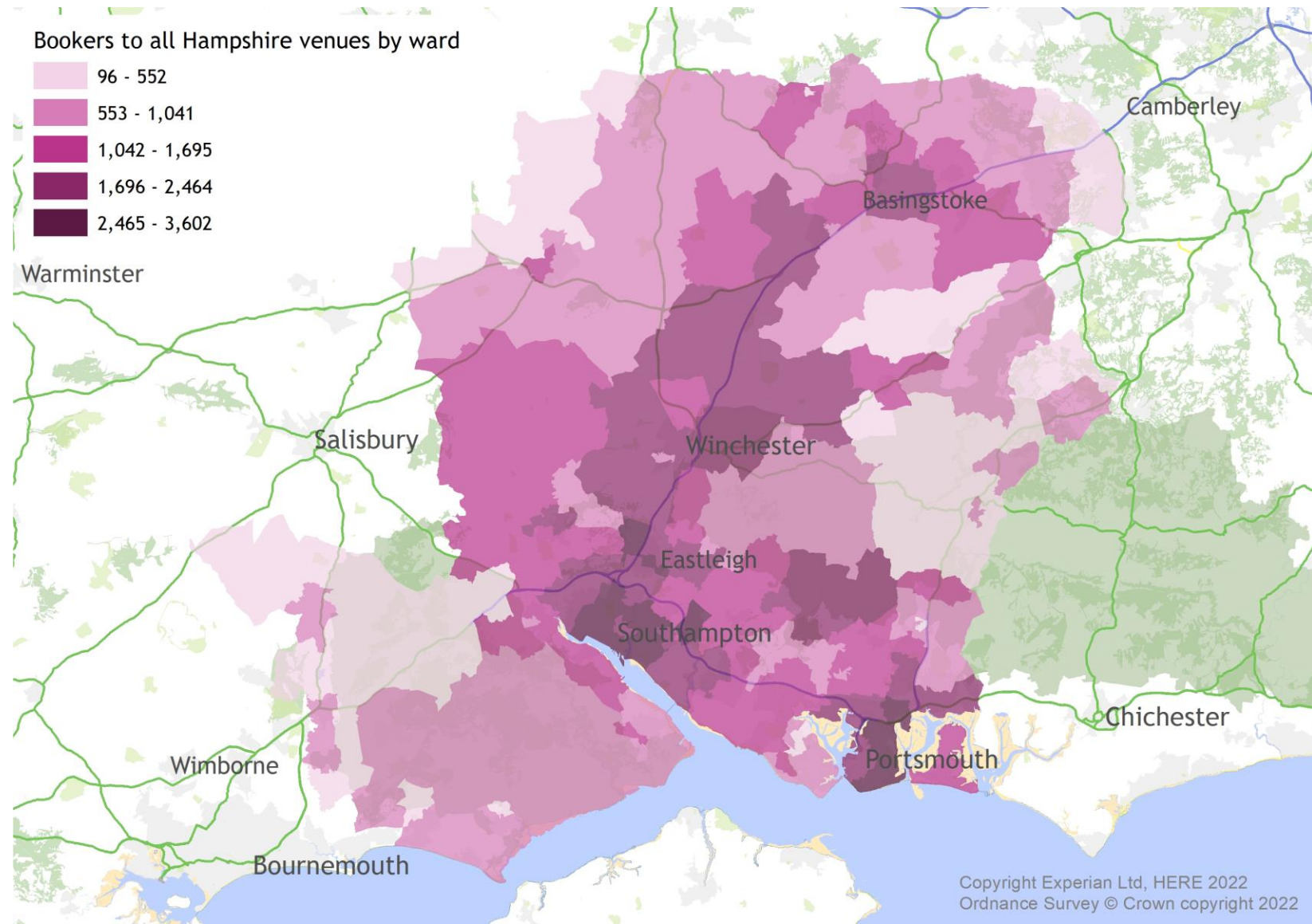
Almost half of tickets issued elsewhere were in the rest of the South East

Tickets issued to Hampshire residents by organisation outside of Hampshire, in years 2016-17 to 2019-20

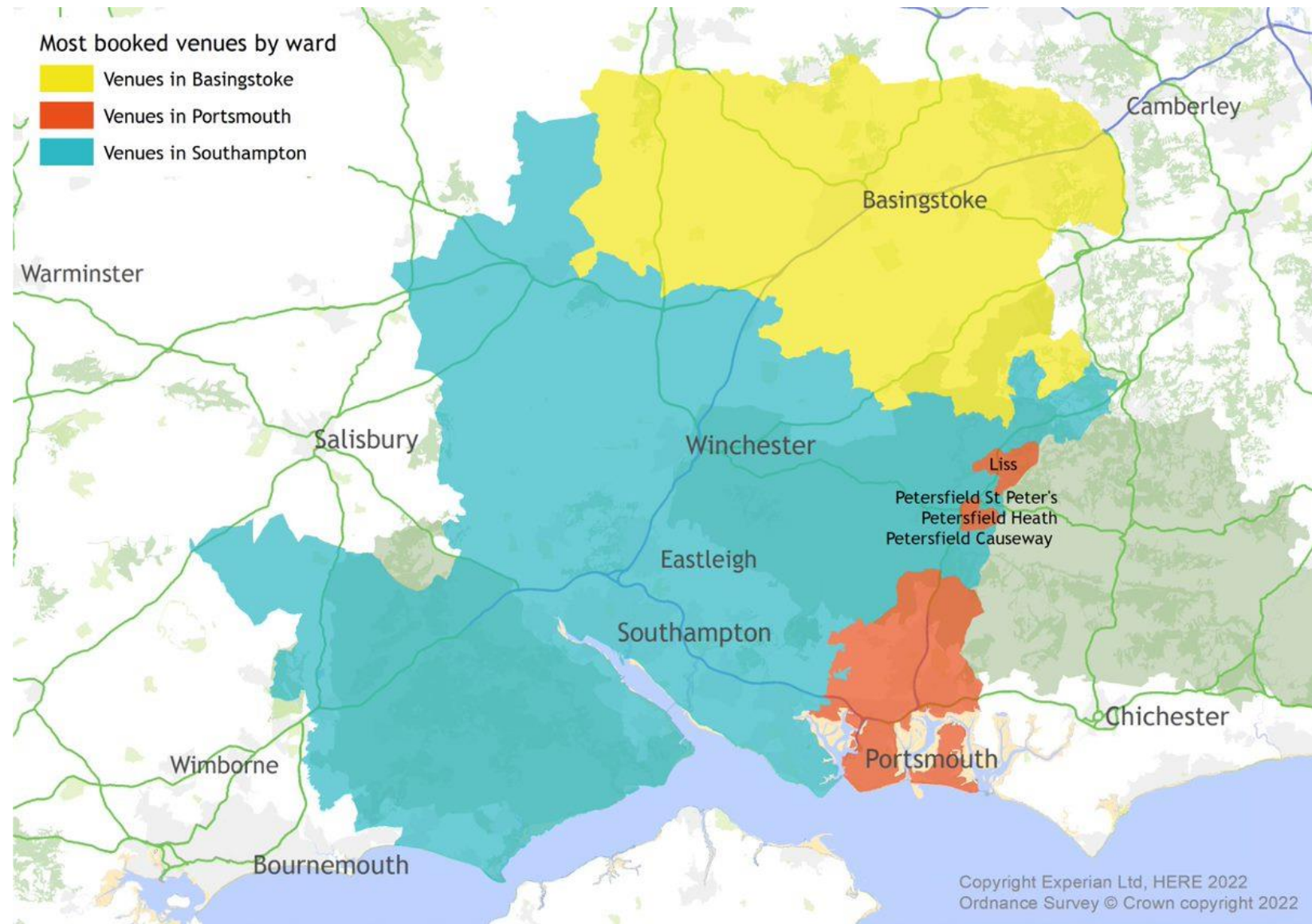


Audience Finder Surveys: 47% of survey respondents from Hampshire were visiting organisations in Hampshire

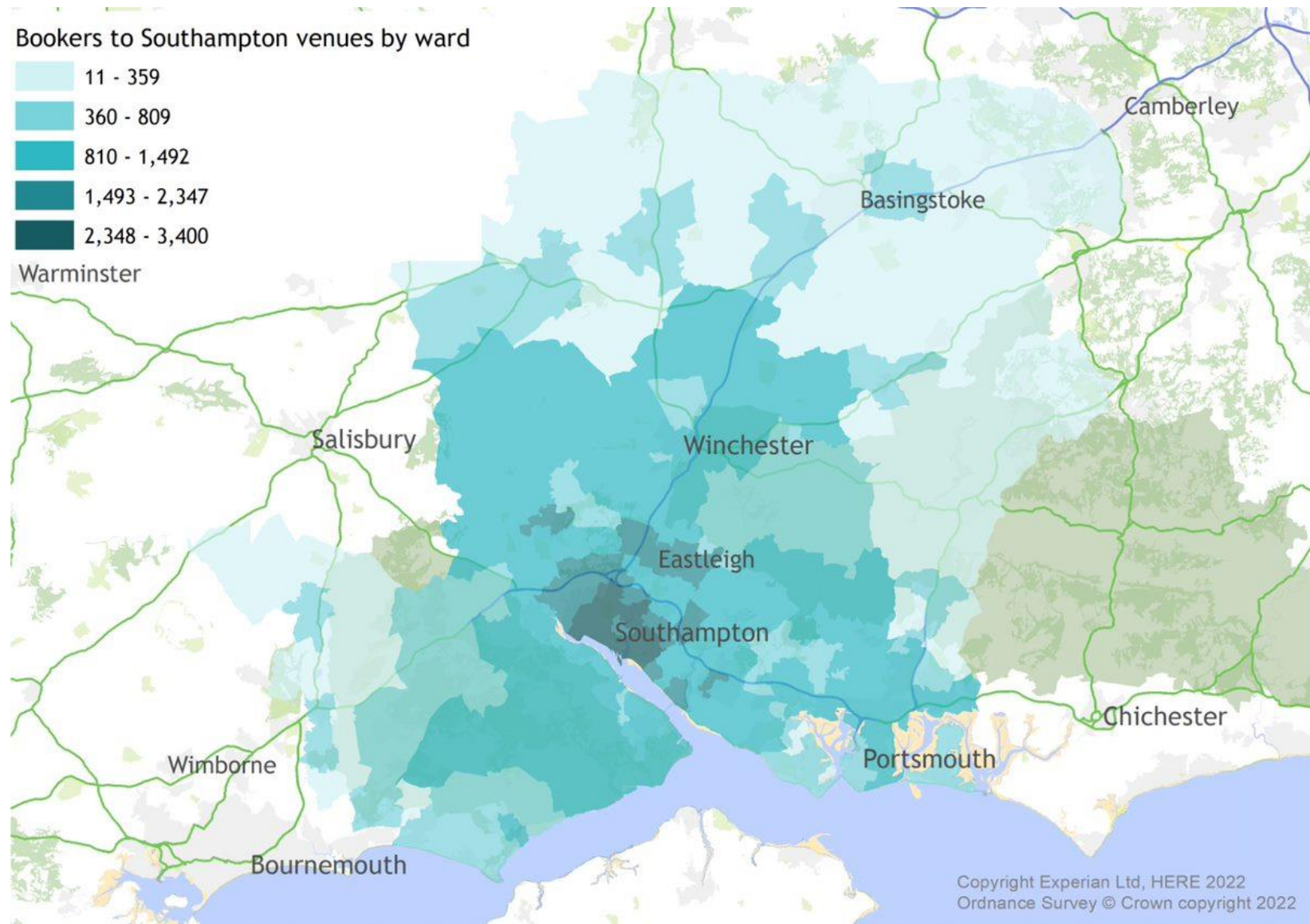
Audience Concentrations



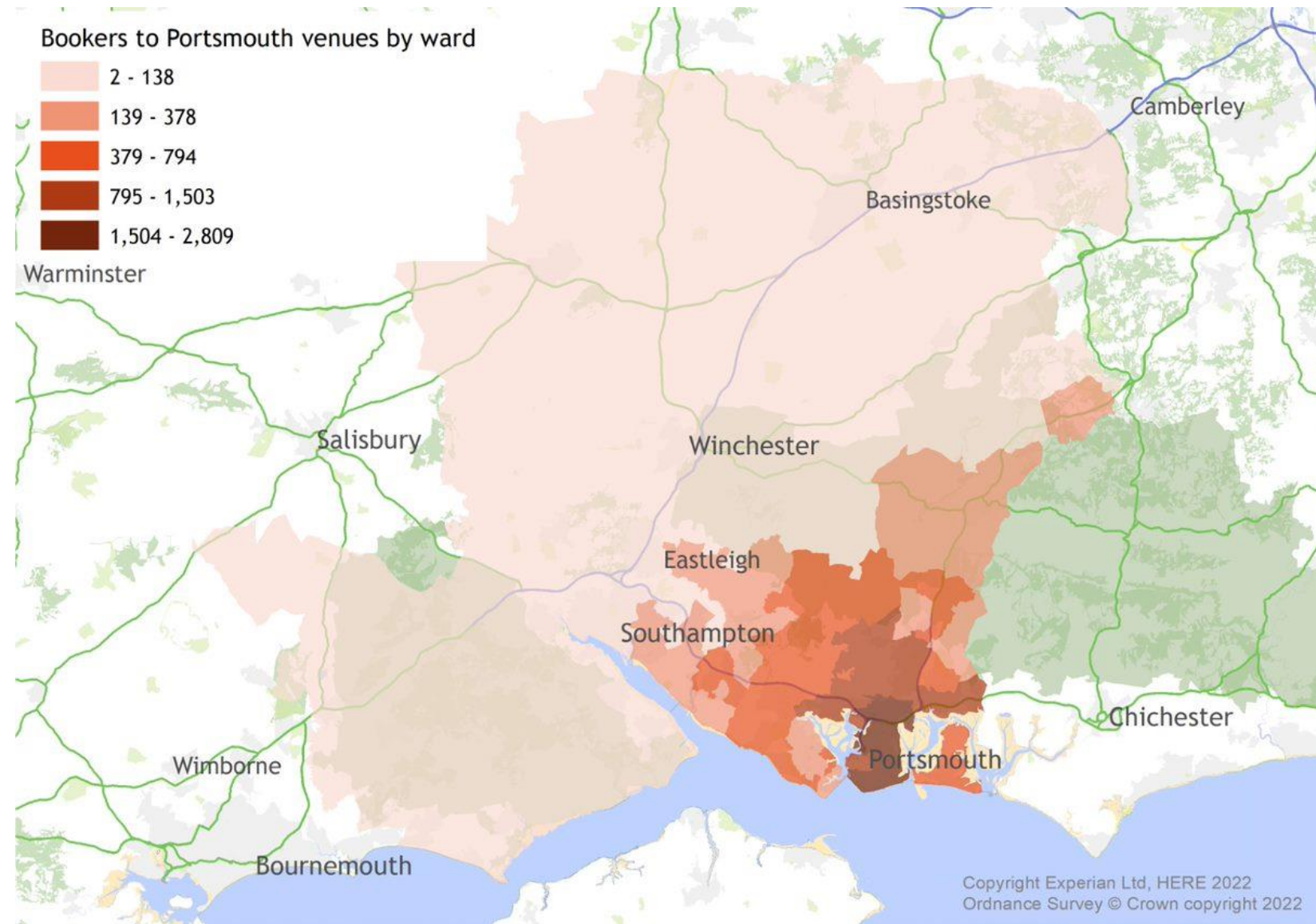
Audience 'Watersheds'



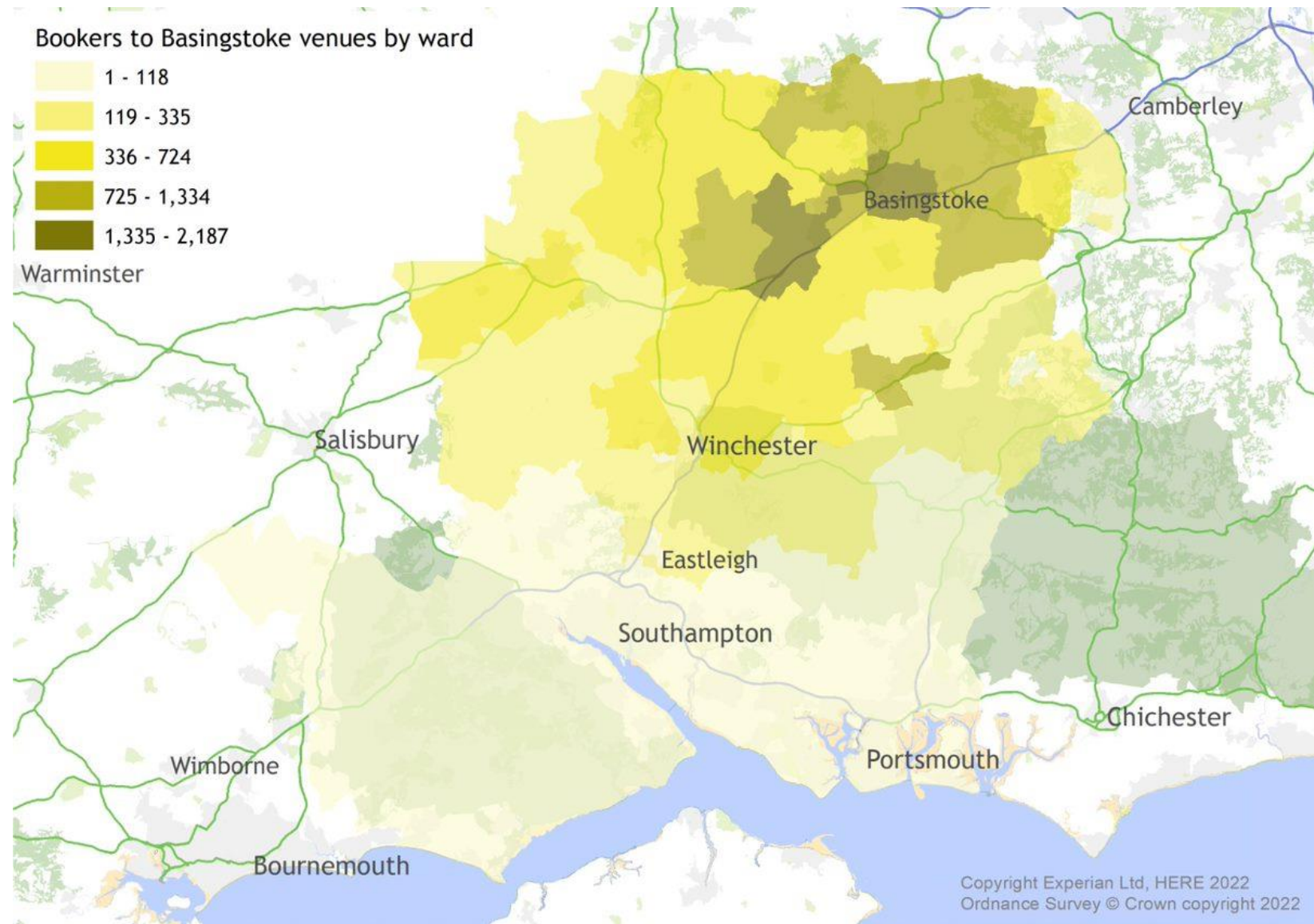
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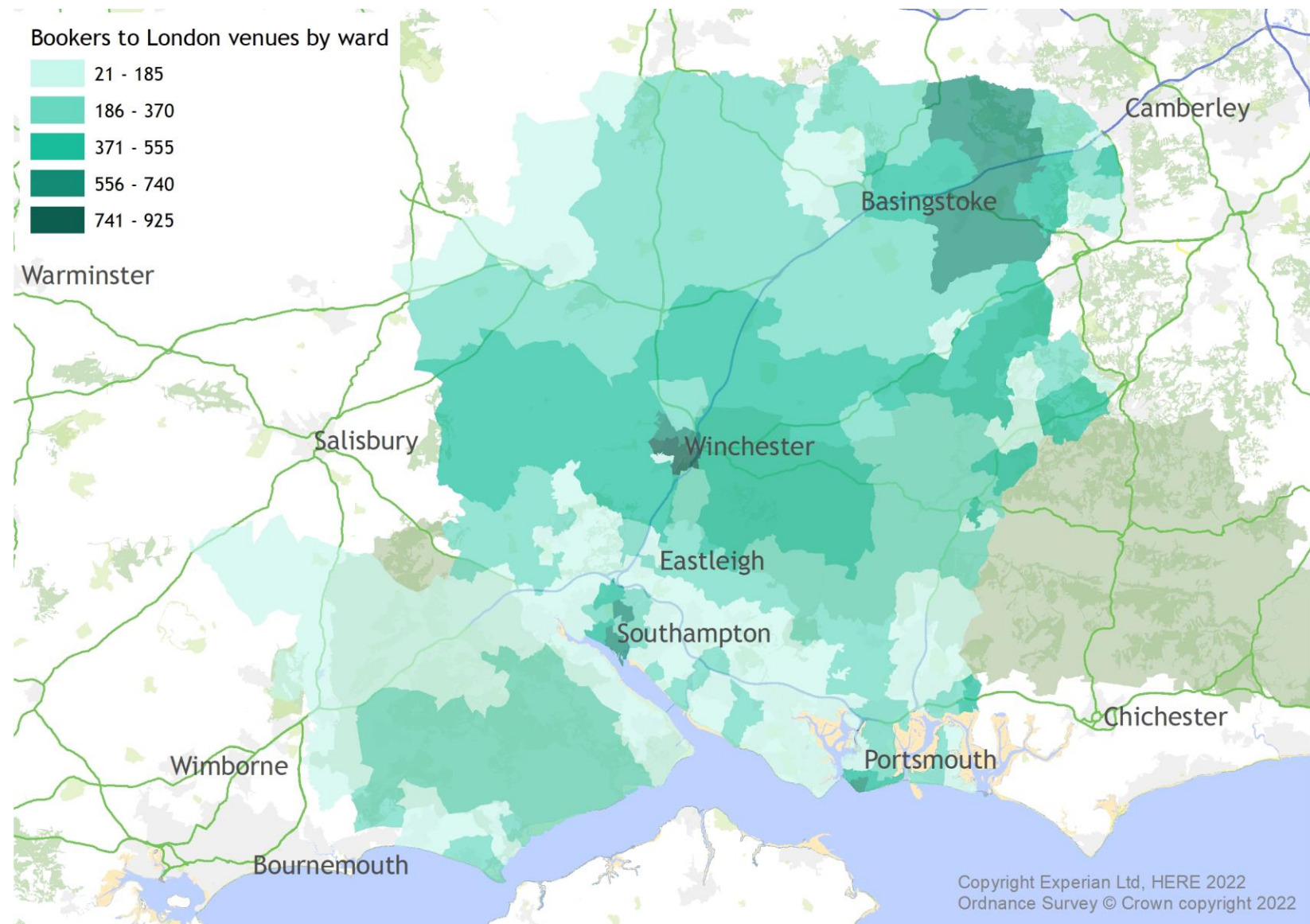
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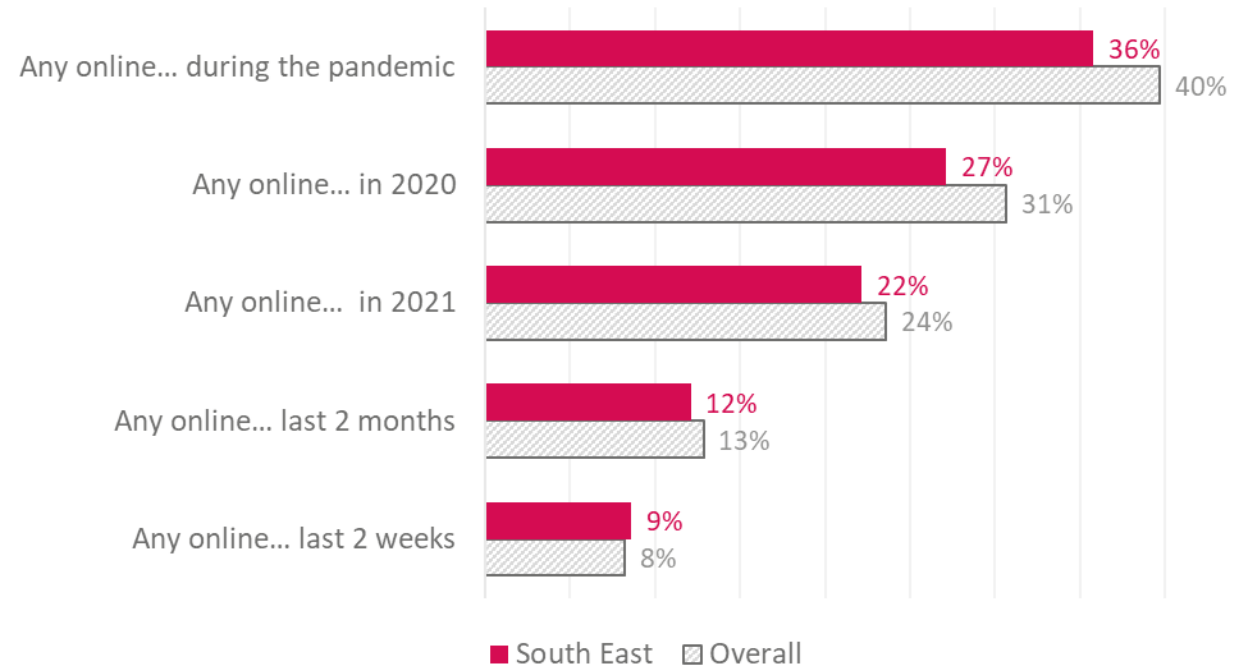
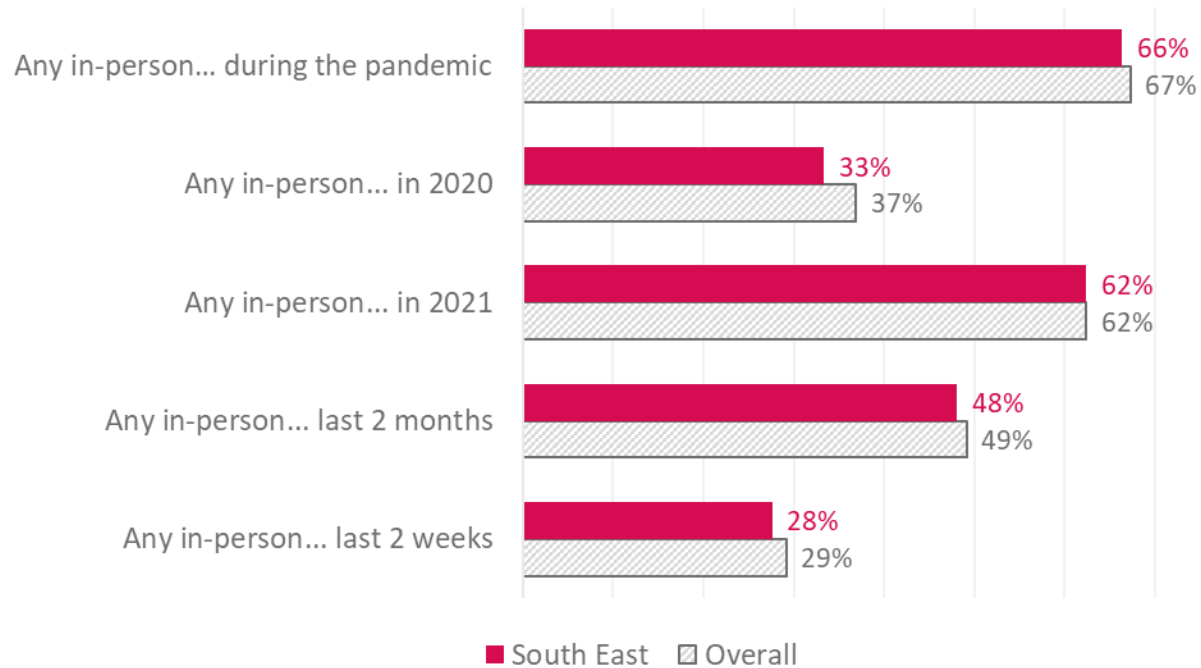
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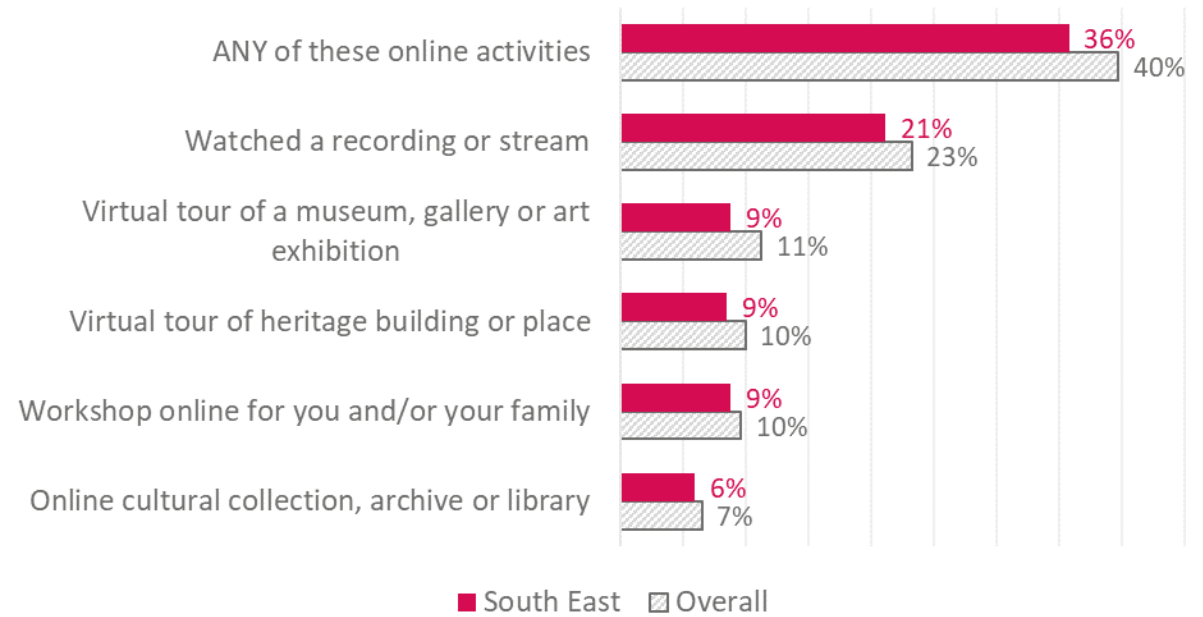
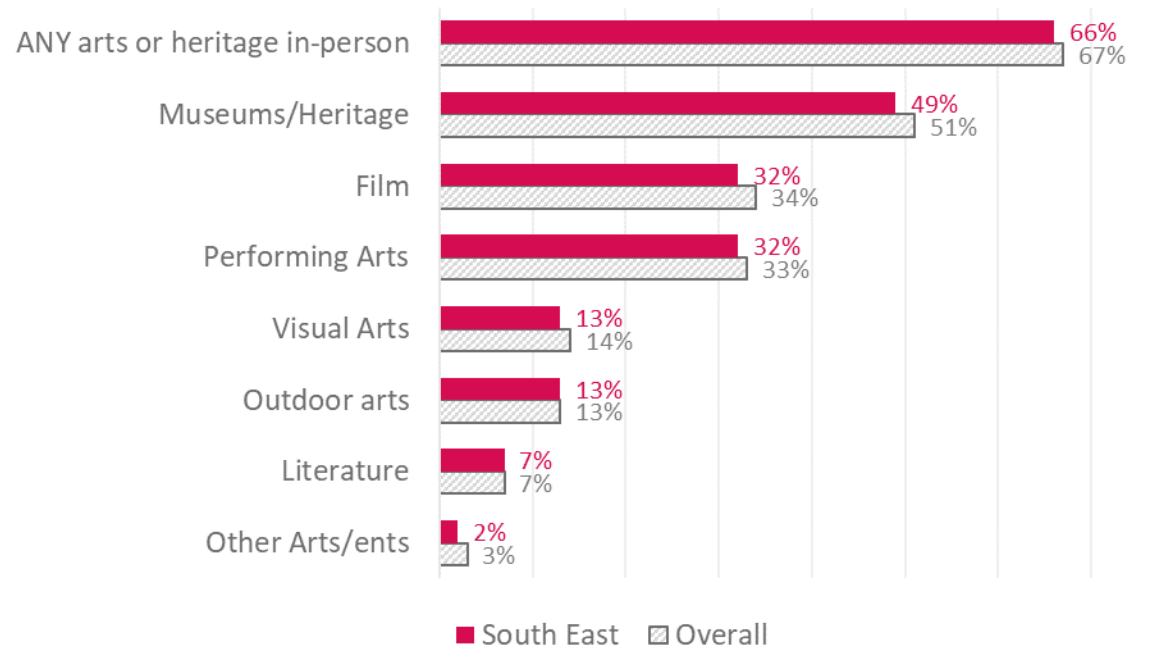
Local Audiences

Engagement (Cultural Participation Monitor)

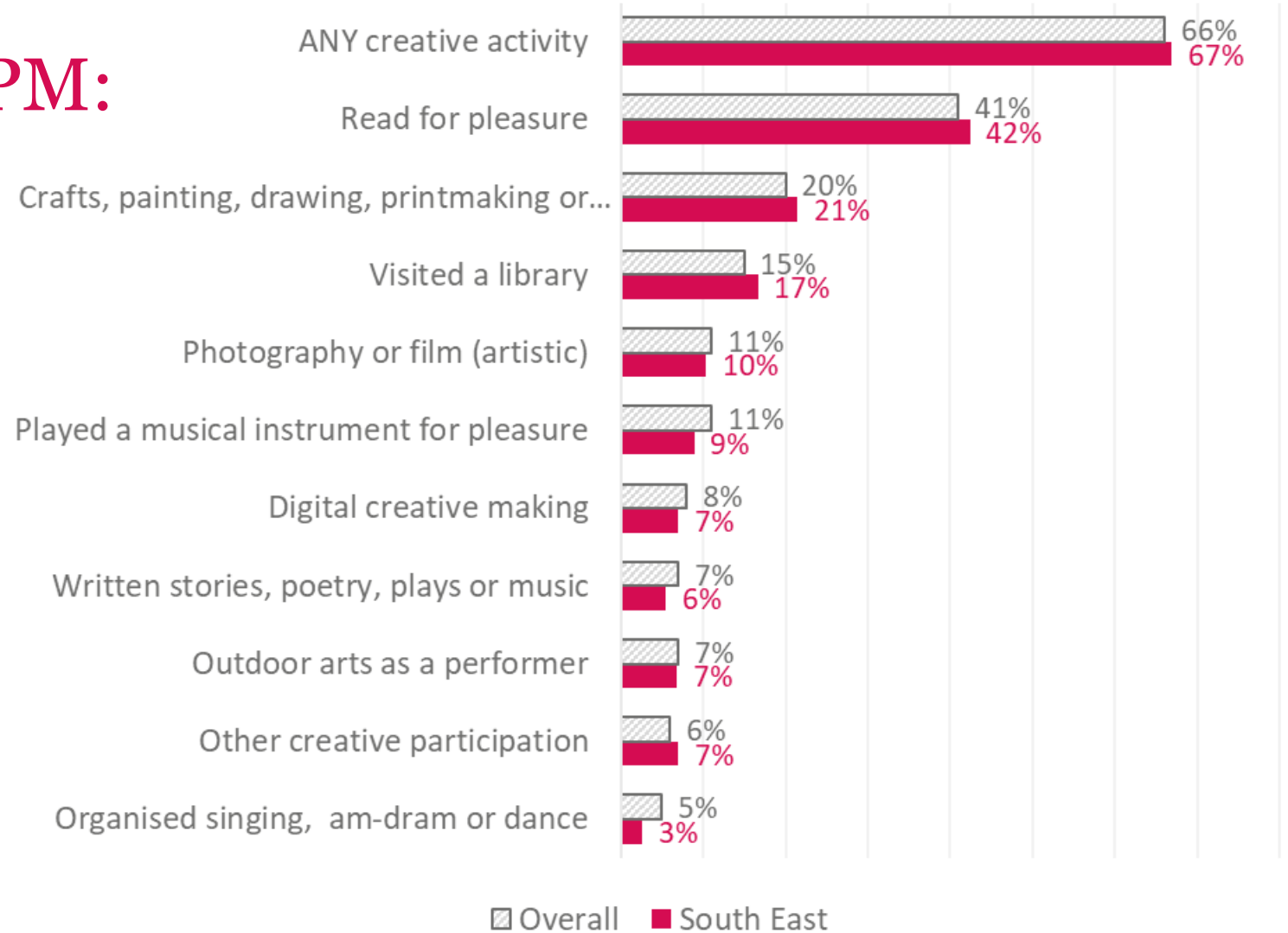
Engagement from CPM: During COVID



Engagement from CPM: During COVID

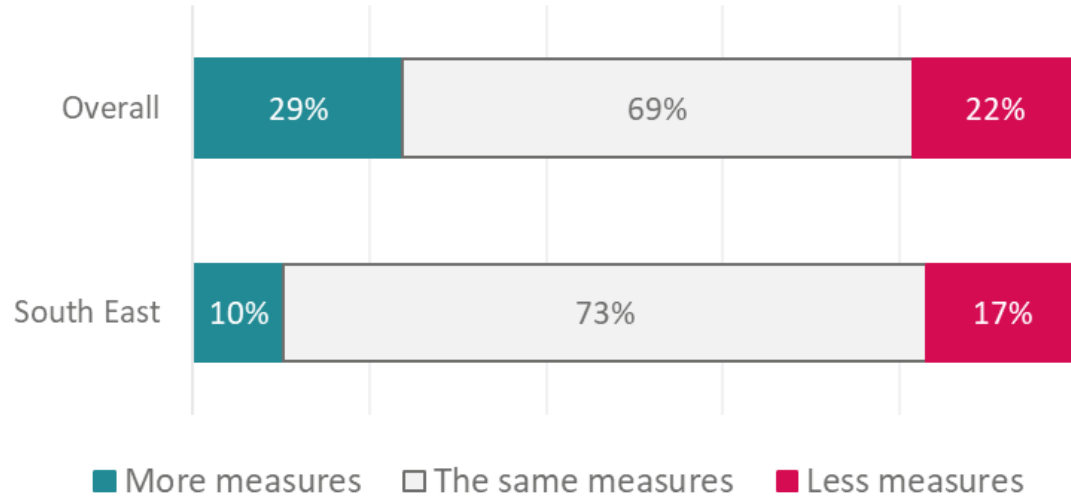


Engagement from CPM: During COVID

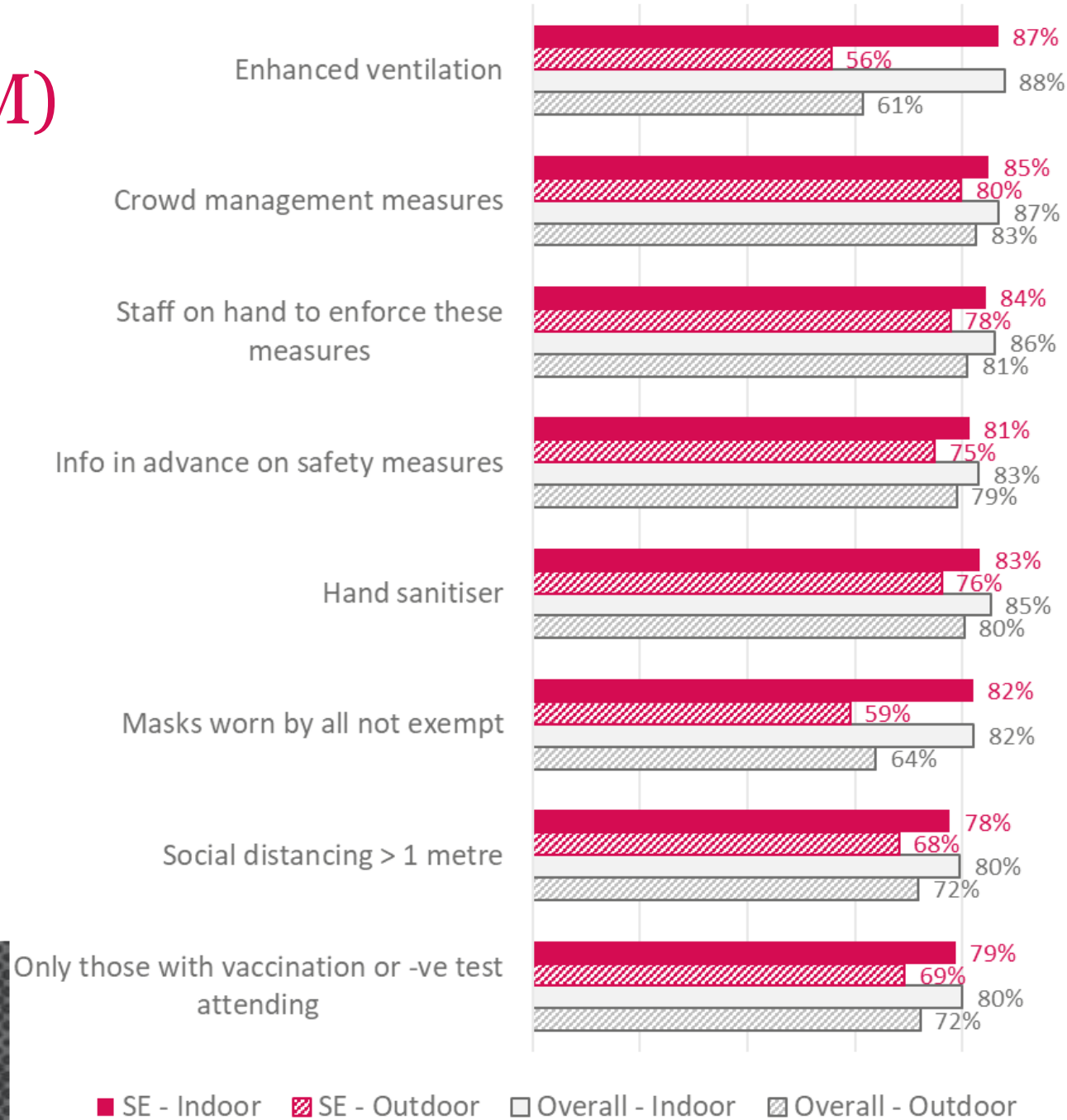


Attitudes to Measures (CPM)

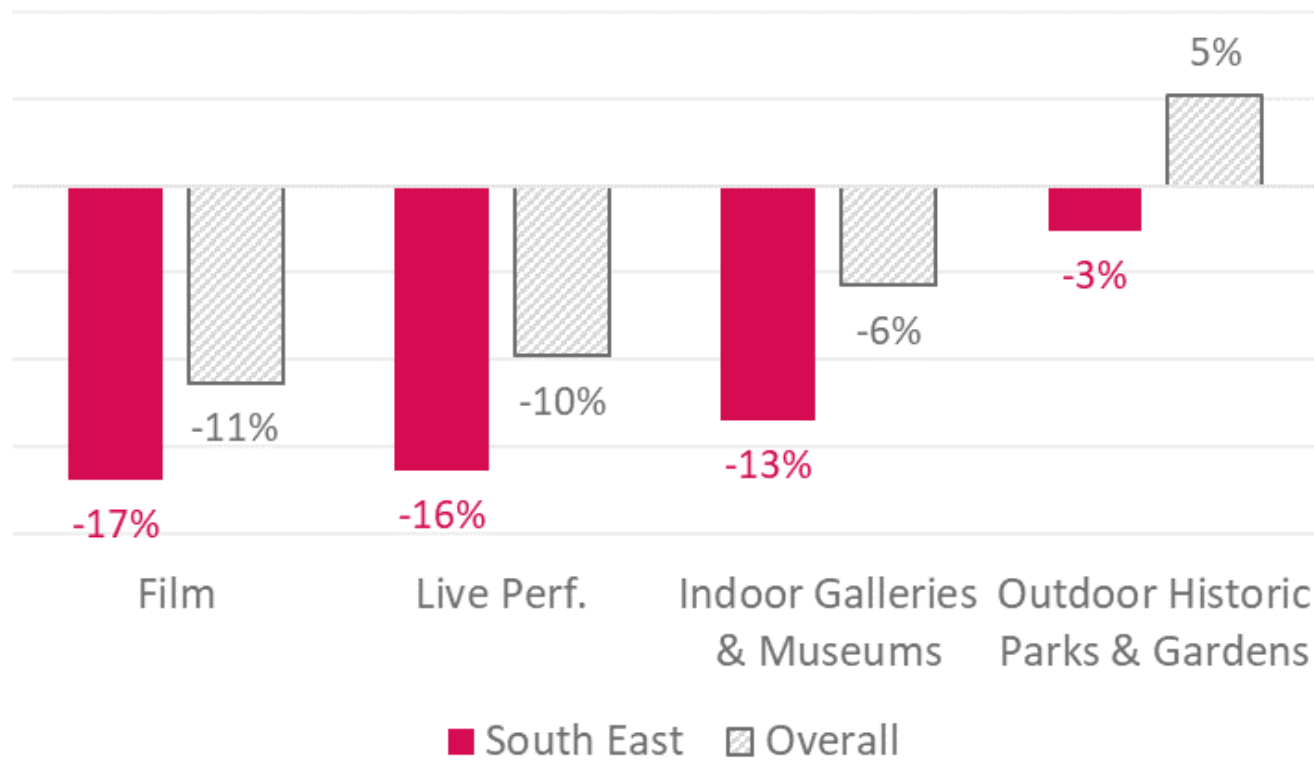
If attending again, would you want...?



% 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 Presented:

- Strong contrasts in profile (between towns/cities and urban/other)
- Shift from older -> families
- So'ton greater spread than P'mouth? Basingstoke holding its own...
- Lower COVID attendance but less concern
- Threats for the future...?

From Discussion...:

- Some shifts in audiences / different things selling better/worse cf. to expectations: esp. more unusual work/ younger audiences doing better cf. to what would have been 'safe' core programme, inc. for older classical audiences. Also later booking, even from groups who wouldn't usually book late.
- Some online activity (e.g. tours) have proved positive both for reach and income - likely to continue (also online sales platforms).
- Concern remains re crowding and desire for safety measures remain.
- Interest in sales for other 'popular' art forms (comedy, gigs etc)

In Conclusion...?

Commuterland Culturebuffs:

- High in population (usually outside towns/cities)
- Over-represented
- More reluctant post/during COVID

Dormitory Dependables:

- Among most over-represented; high in population
- Average re COVID response

Trips & Treats:

- High concentrations (esp. P'mth/So'ton)
- Under-represented, but rising

Home & Heritage:

- Under-represented and falling
- Reluctant post/during COVID

Facebook Families:

- Under-represented, but growing most
- Particularly exposed to cost-of-living crisis?

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
 - Outdoor Arts & Festivals (24/2)
 - Audience Finder Onboarding (23/3; 27/4)
 - Museums & Visual Arts (28/4)
- 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