

West of England

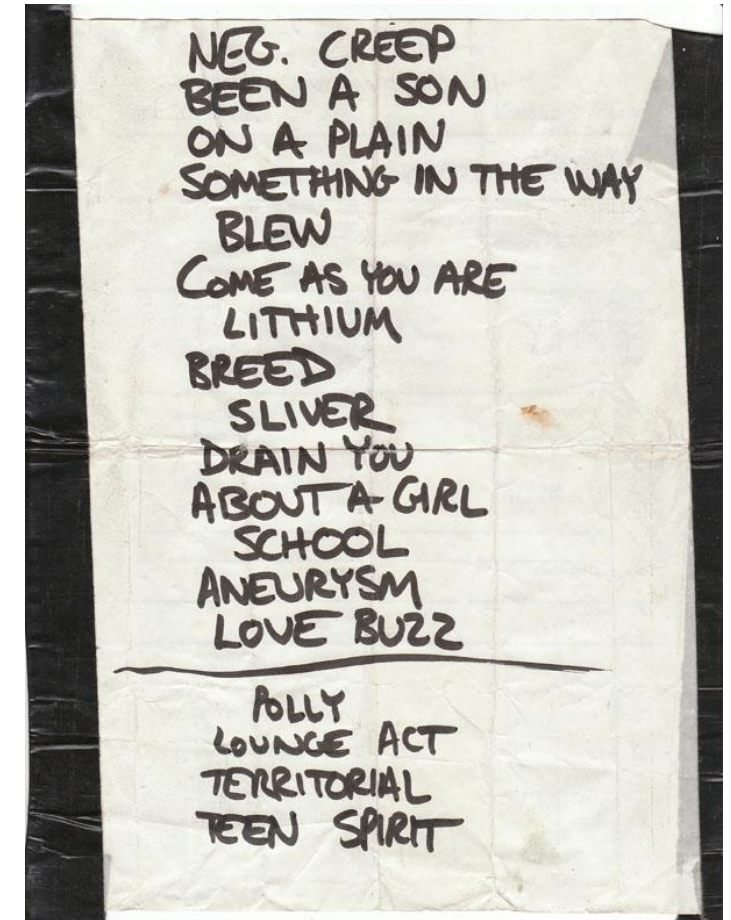
Place Based Insights

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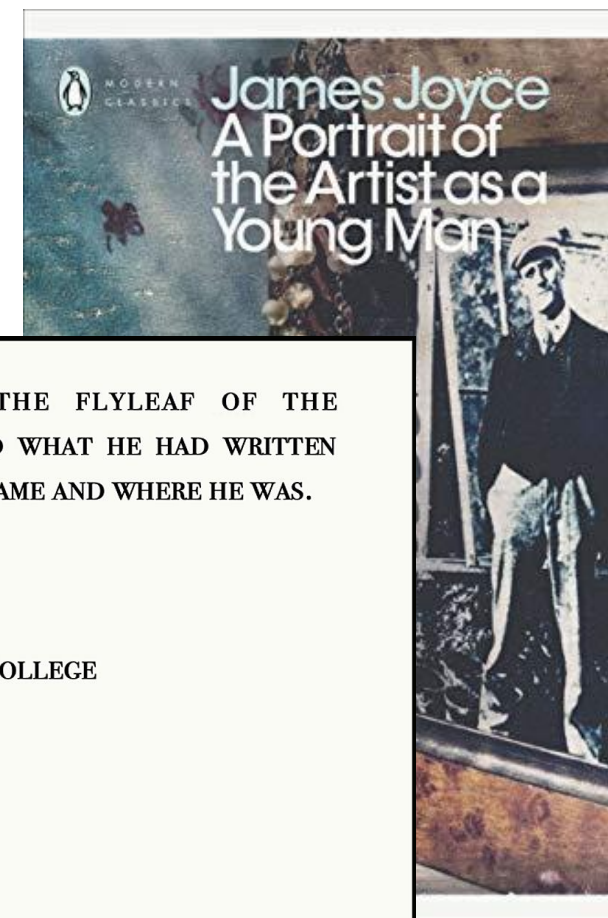
Format of the session

- 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

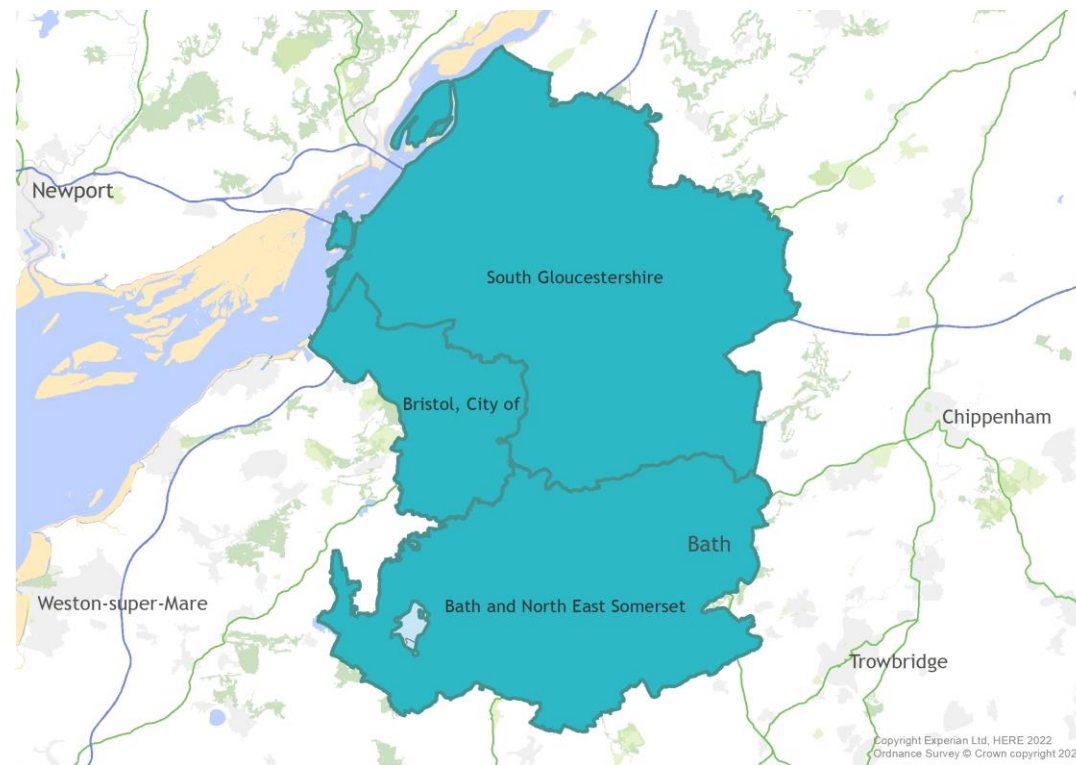


“HE TURNED TO THE FLYLEAF OF THE GEOGRAPHY AND READ WHAT HE HAD WRITTEN THERE: HIMSELF, HIS NAME AND WHERE HE WAS.

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

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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 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. They are interested in 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

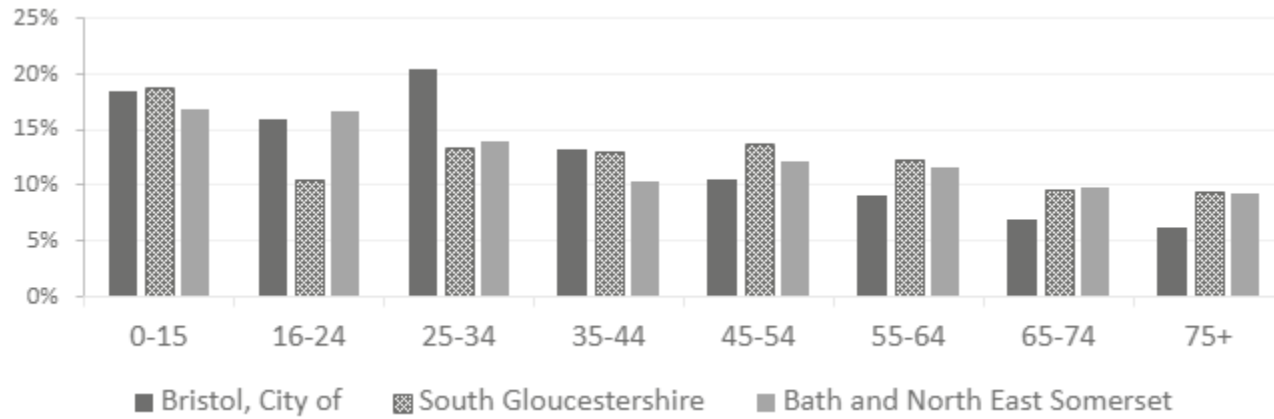
Local Population

Local Area and Population

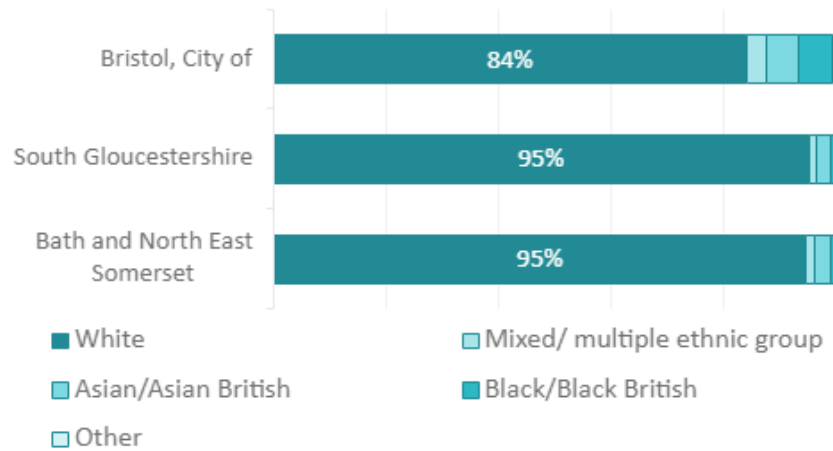
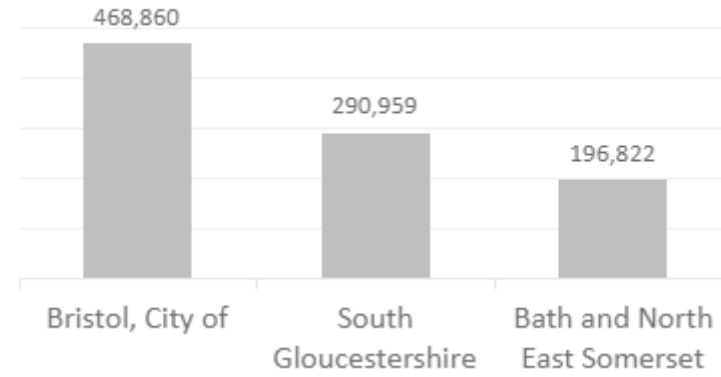
- Overview of demographics
- Audience Spectrum, inc. maps:
 - Largest segment
 - Each of the three largest segments
- Top Lines from Cultural Participation Monitor



Population data – comparing the local areas

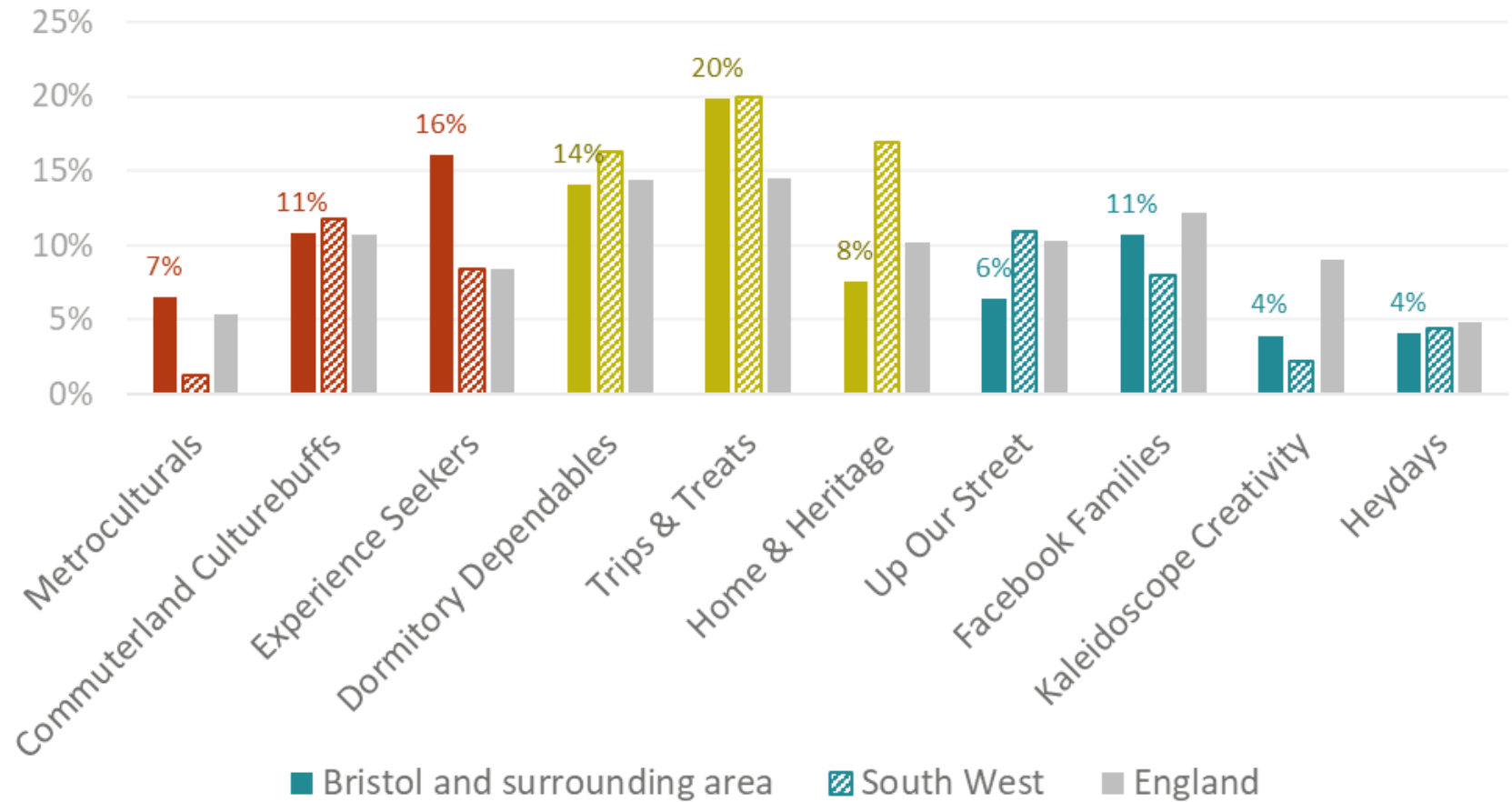


Population estimate 2020



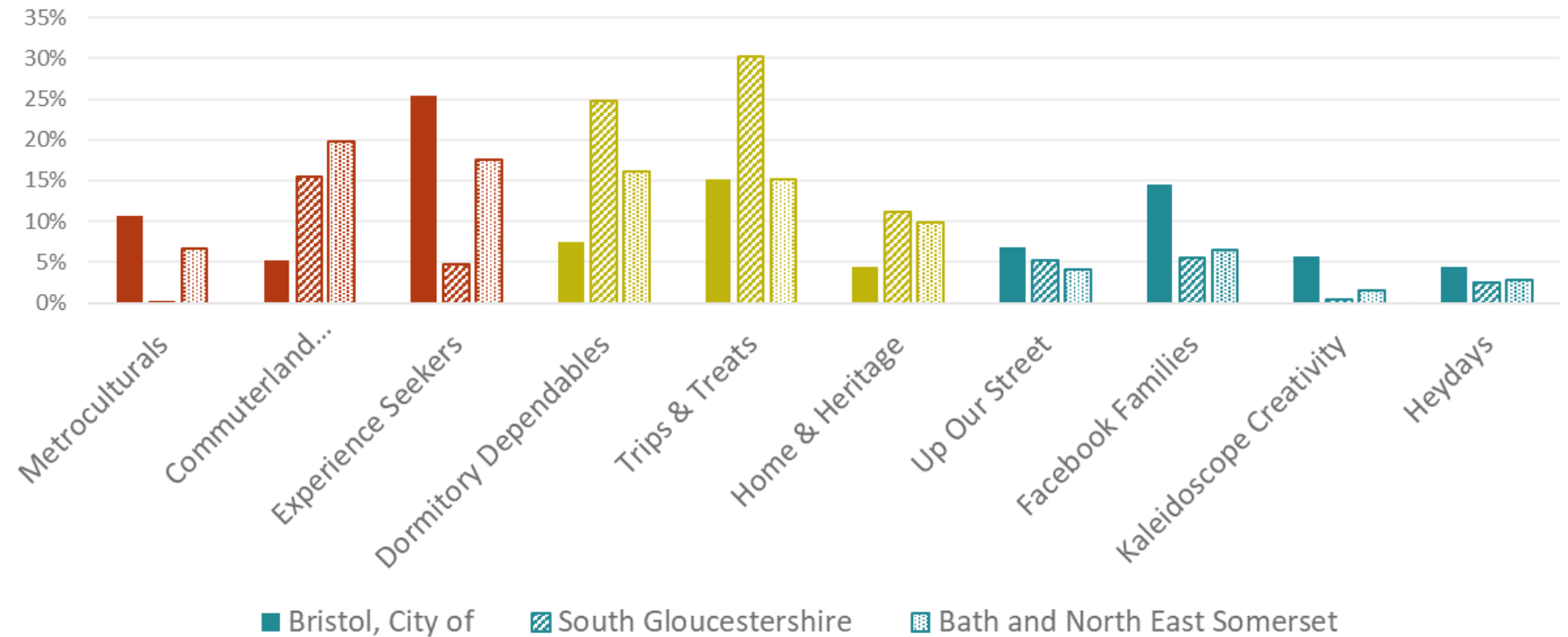
Overall Population Audience Spectrum Profile

High Concentrations of Groups with More Families



Audience Spectrum Profile by Local Area

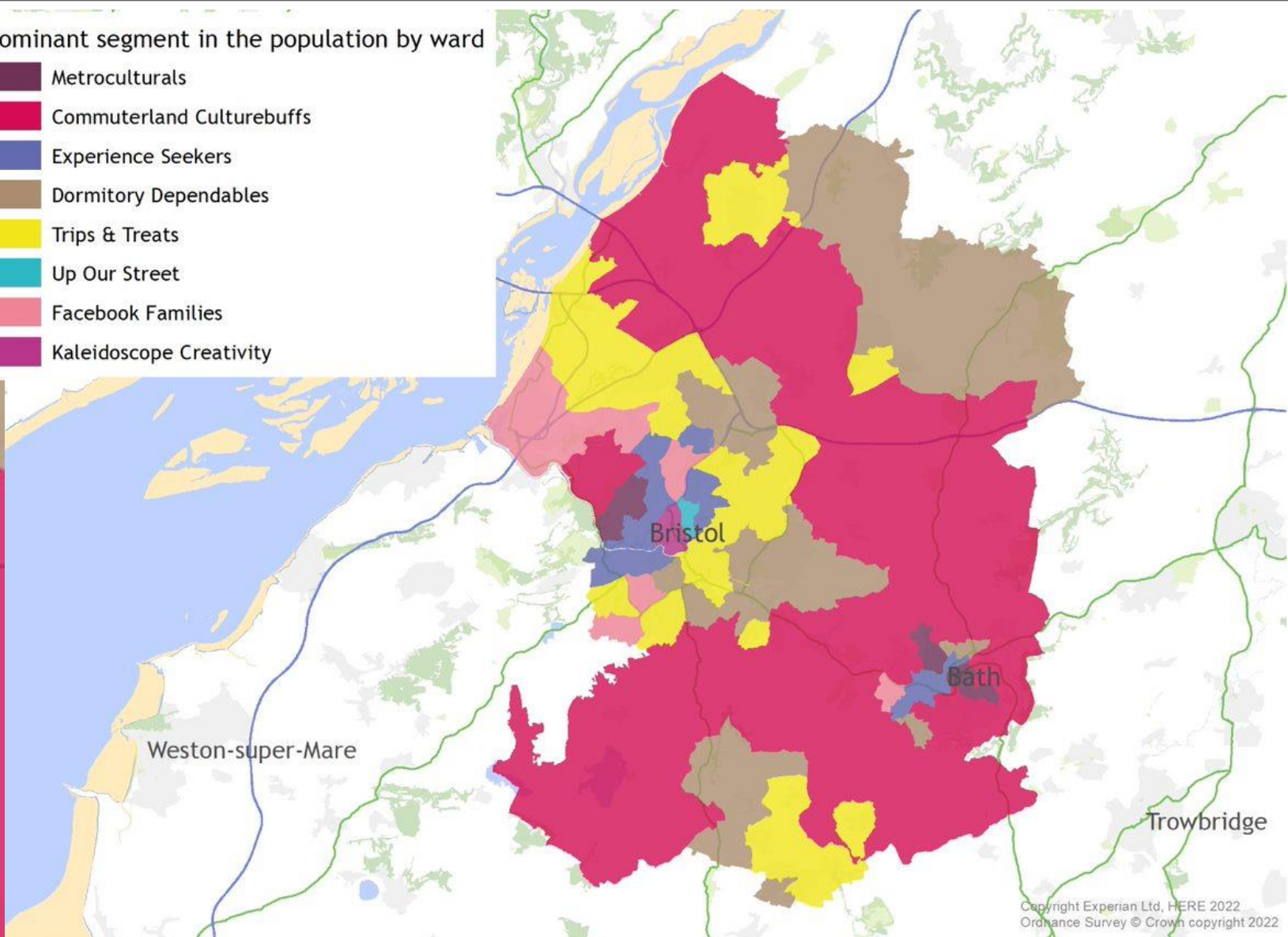
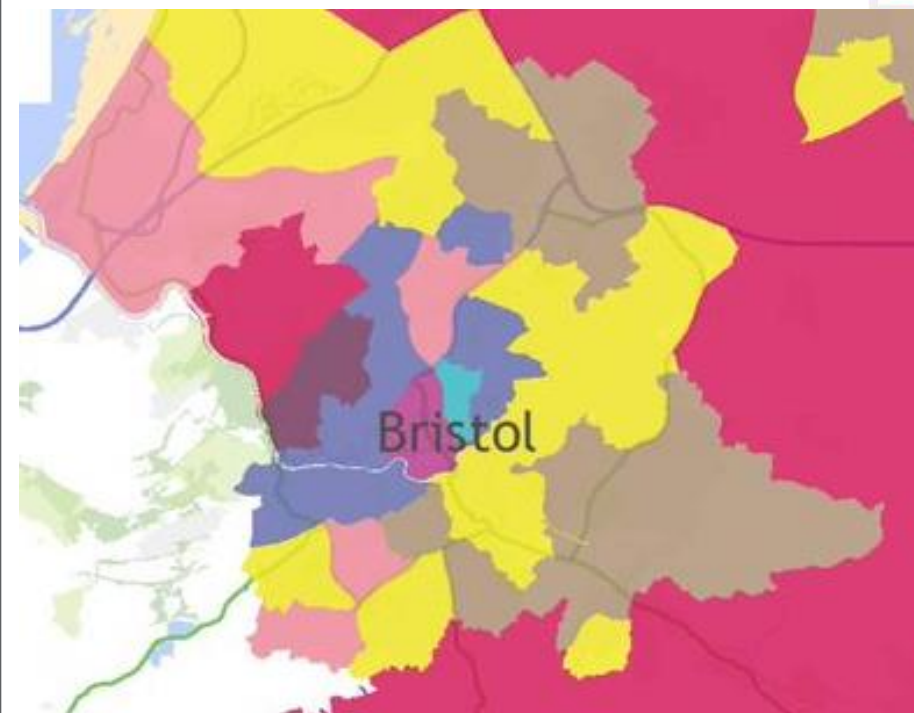
Bristol has the most Experience Seekers and Facebook Families, South Gloucestershire the most Trips & Treats



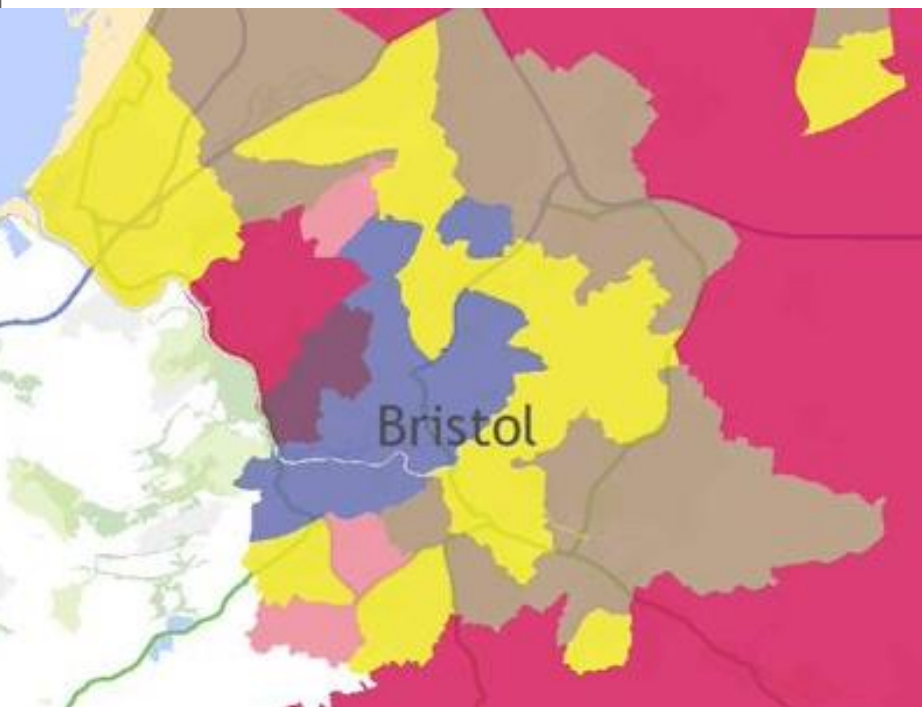
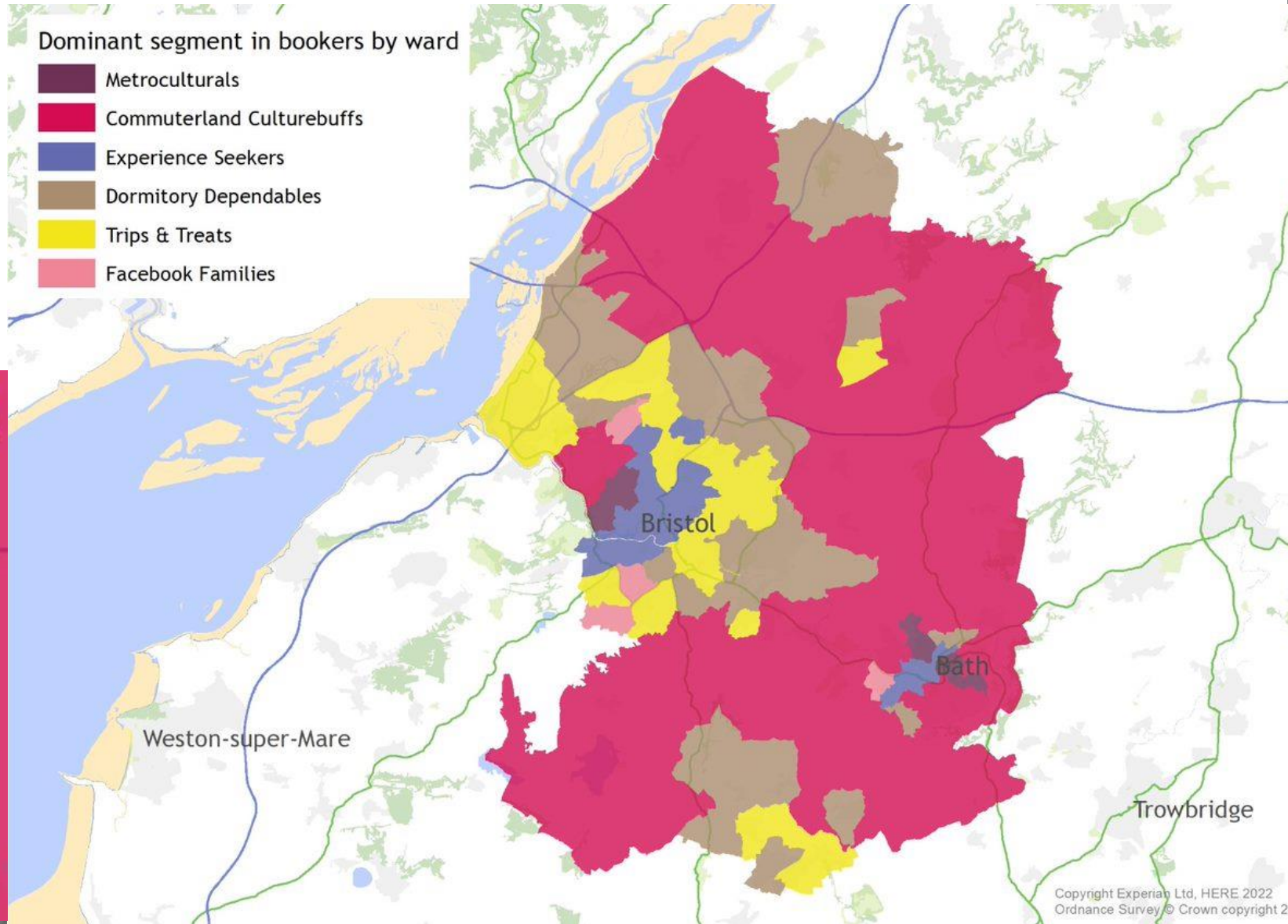
Dominant Audience Spectrum Segment by Ward - Population

Dominant segment in the population by ward

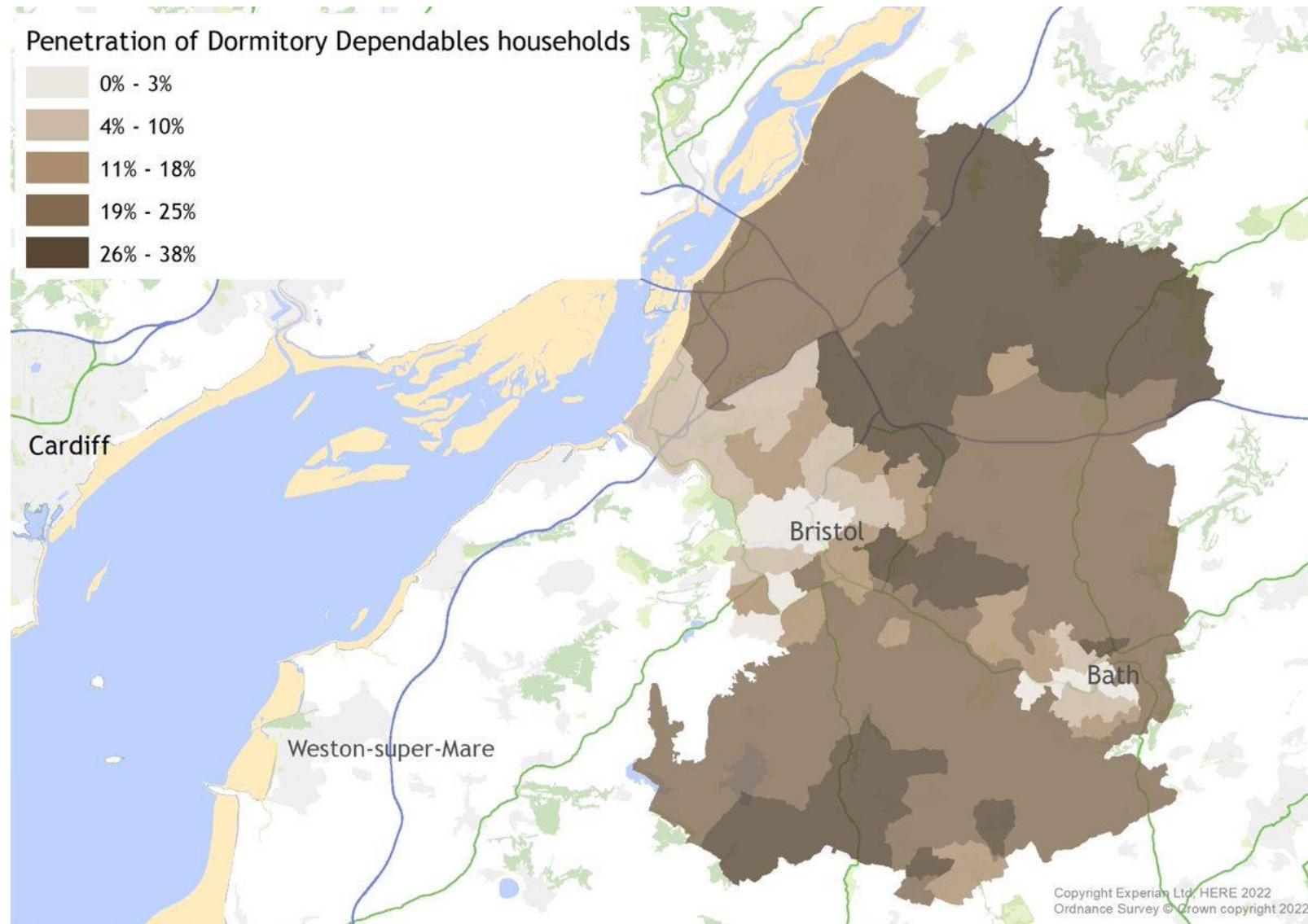
- Metroculturals
- Commuterland Culturebuffs
- Experience Seekers
- Dormitory Dependables
- Trips & Treats
- Up Our Street
- Facebook Families
- Kaleidoscope Creativity



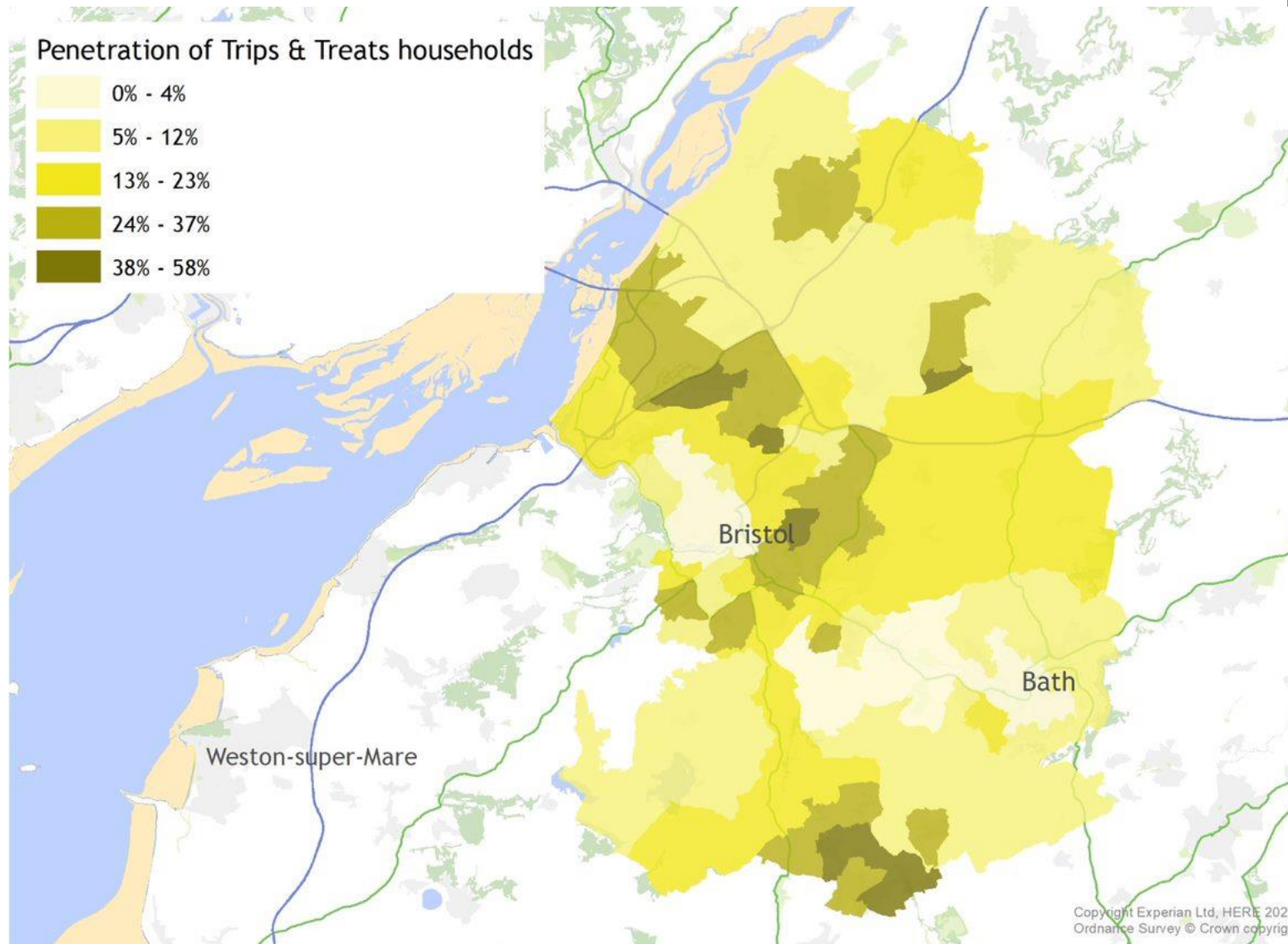
Dominant Audience Spectrum Segment by Ward – Bookers



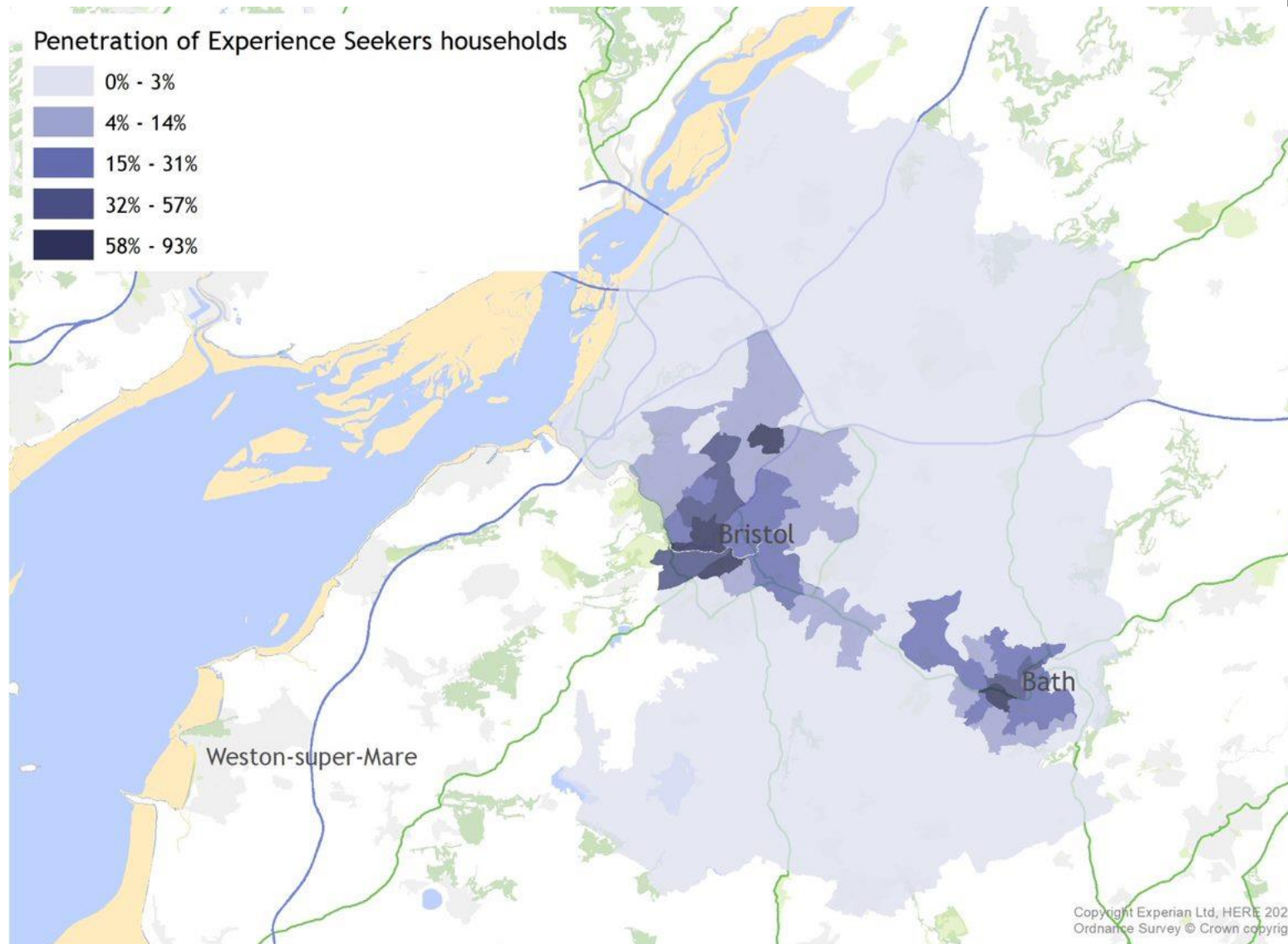
Penetration of Audience Spectrum Population by Ward



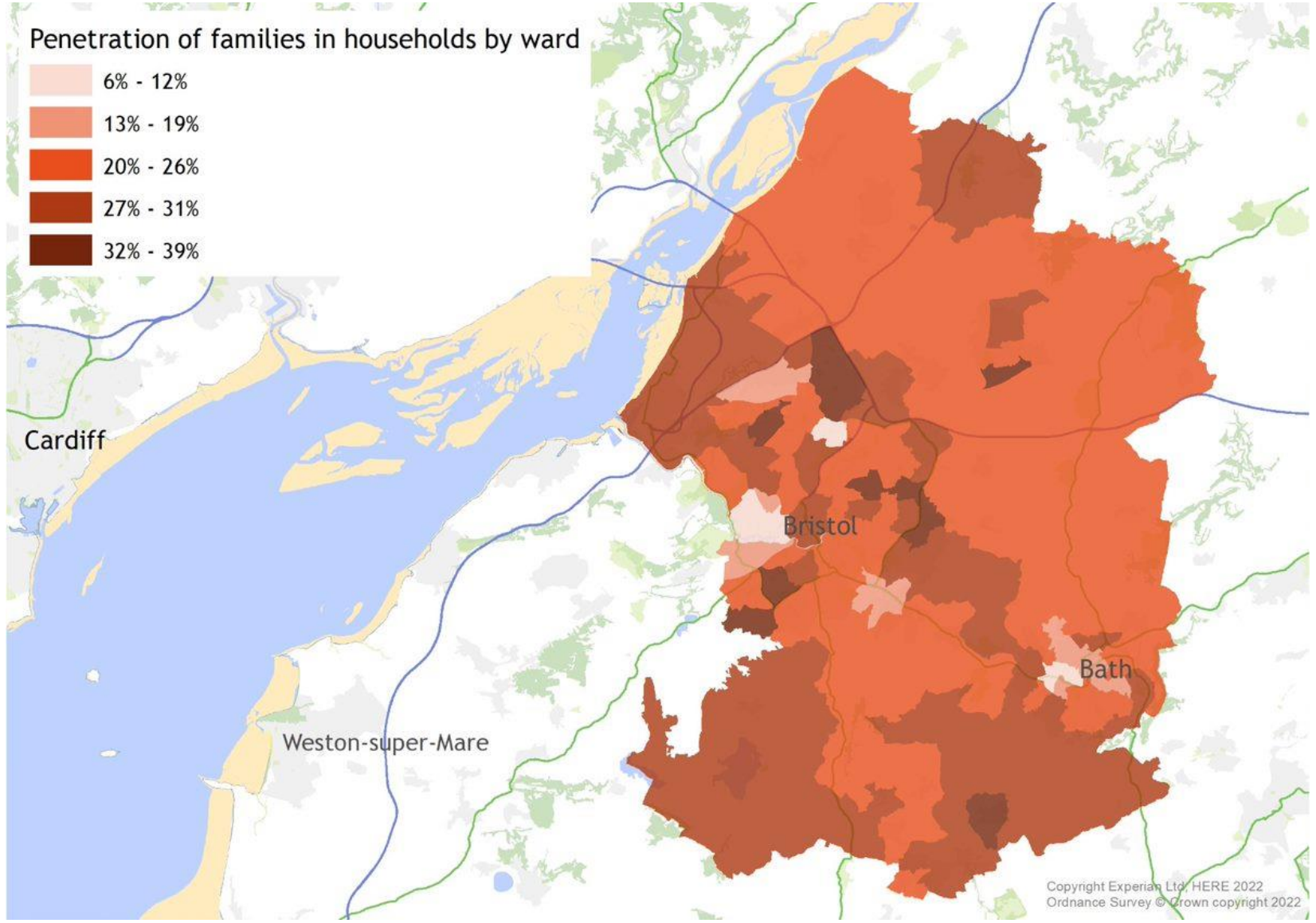
Penetration of Audience Spectrum Population by Ward



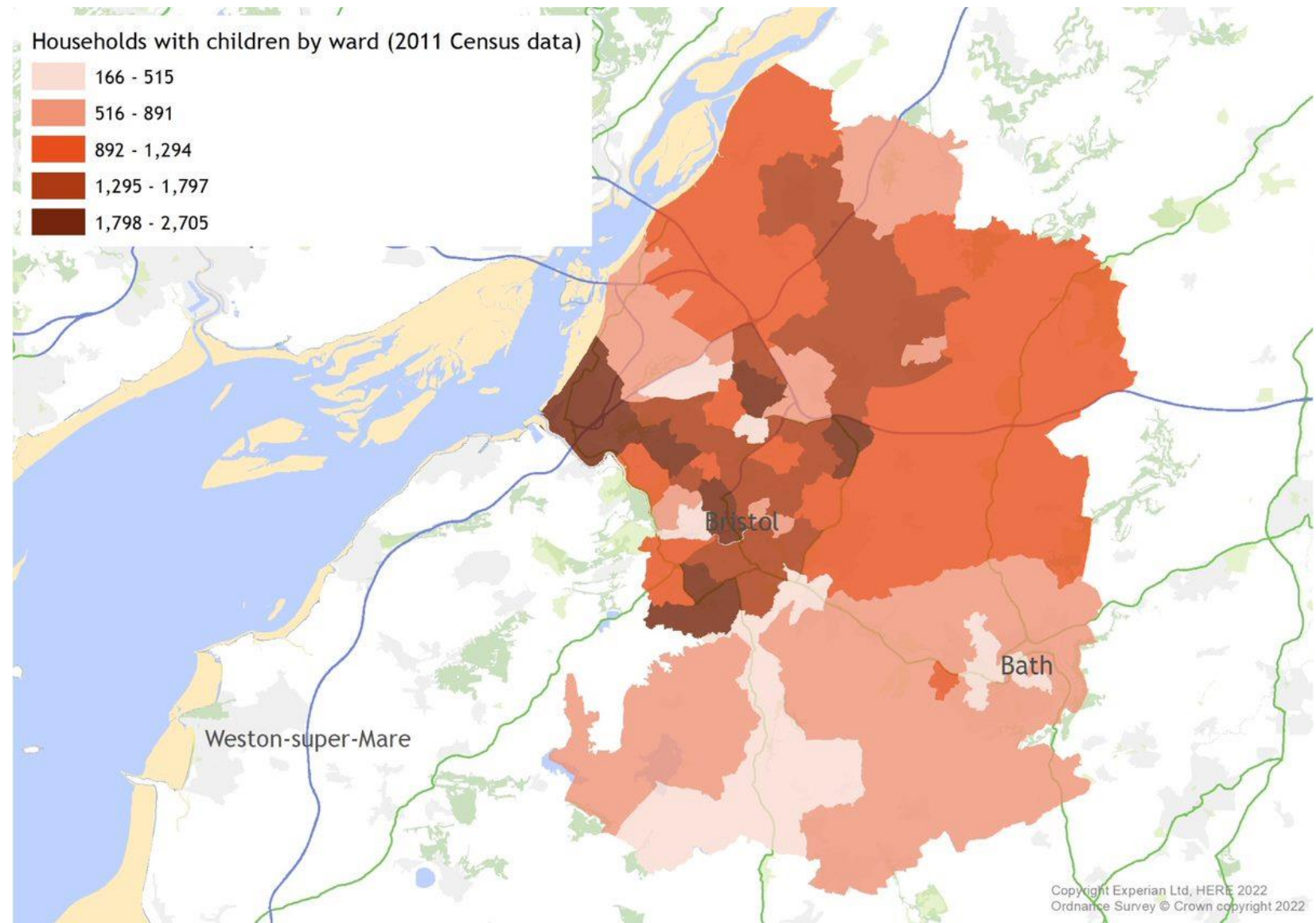
Penetration of Audience Spectrum Population by Ward



Families by Ward - %

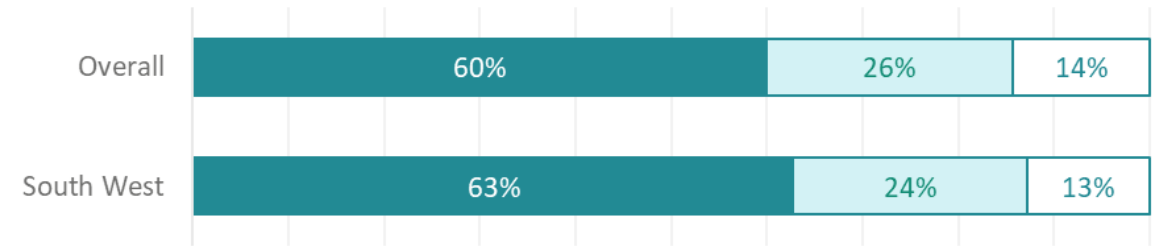
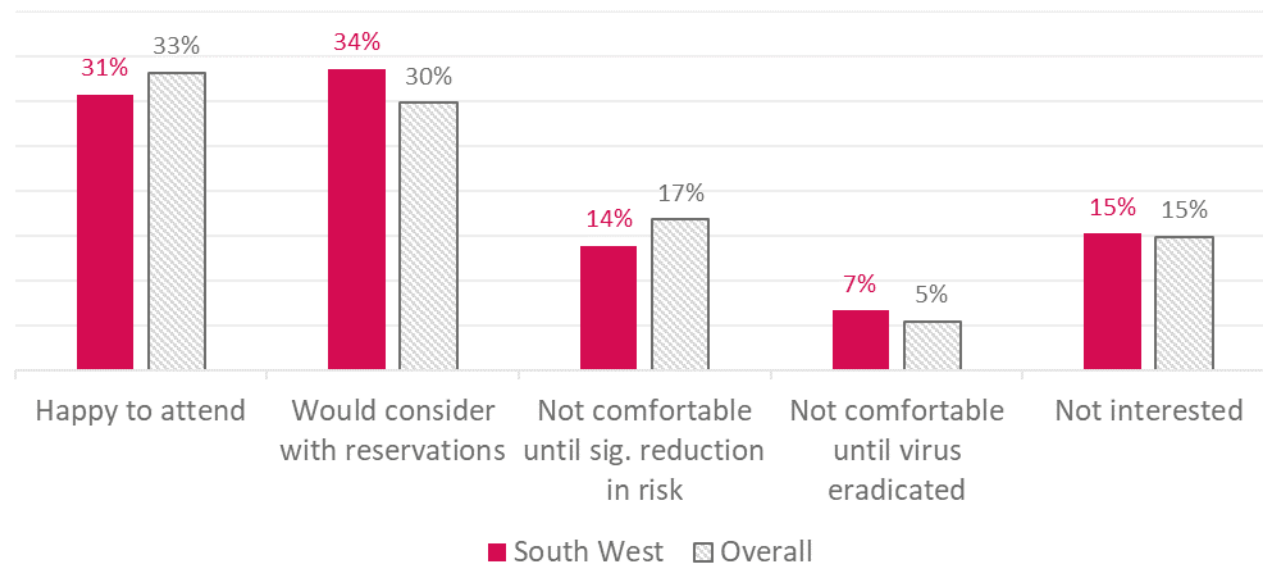


Families by Ward - Count



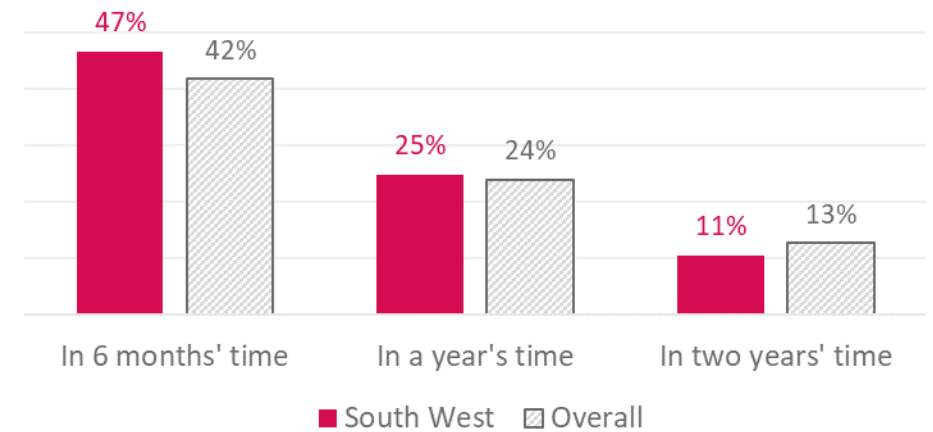
Top Lines from Cultural Participation Monitor

Generally in line, if a little more 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

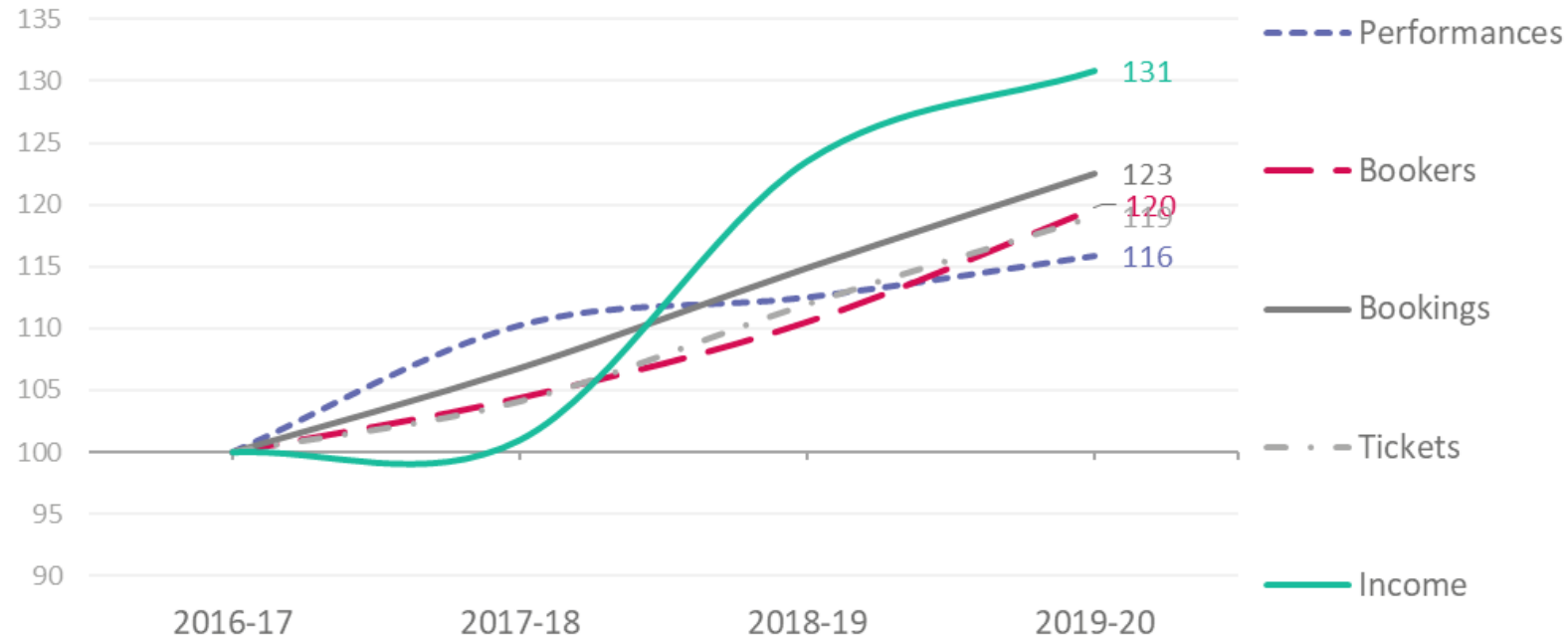
About Local Audiences

Audience Finder ticketing:

	16/17	19/20	Increase
Bookers	69k	83k	14k
Bookings	189k	232k	43k
Tickets	442k	502k	82k
Income	£7.4M	£9.7M	£2.3M

Sales Trends

Sales trend - index



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

2019/20:

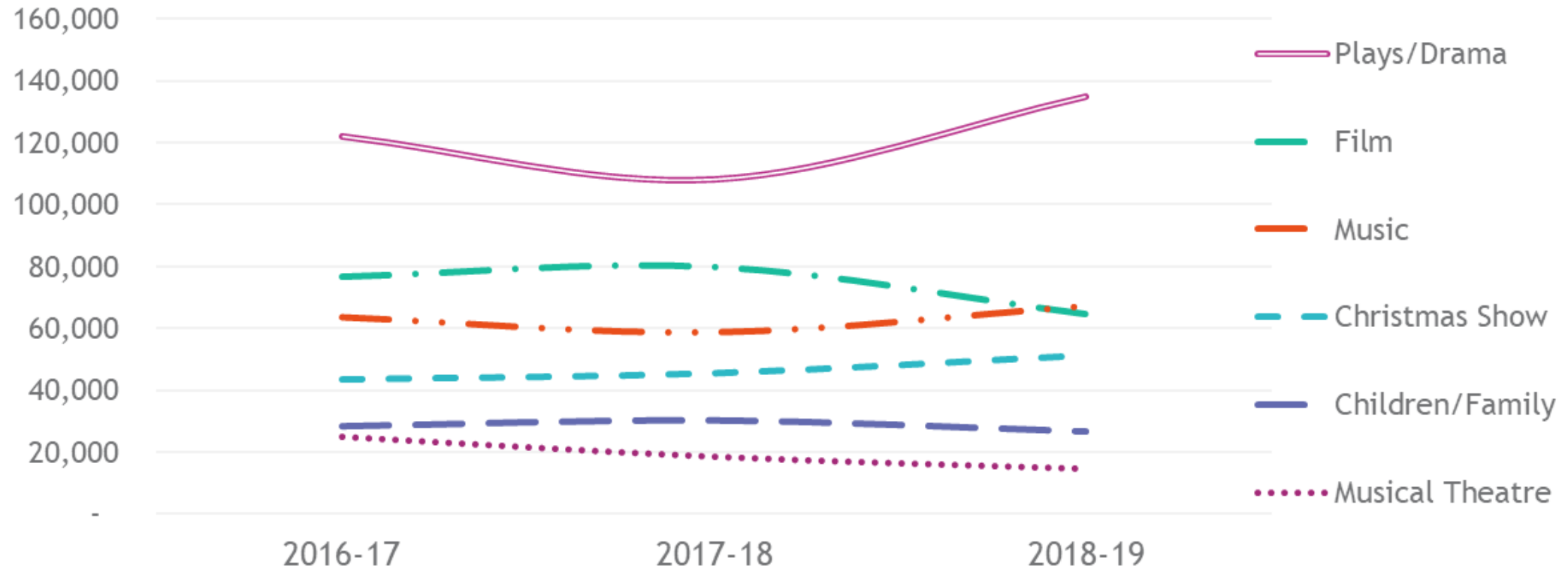
Avg. income/ticket: £19.99, +6%

Avg. bookings/booker: 2.8, +5%

Avg. tickets/booking: 2.2, -3%

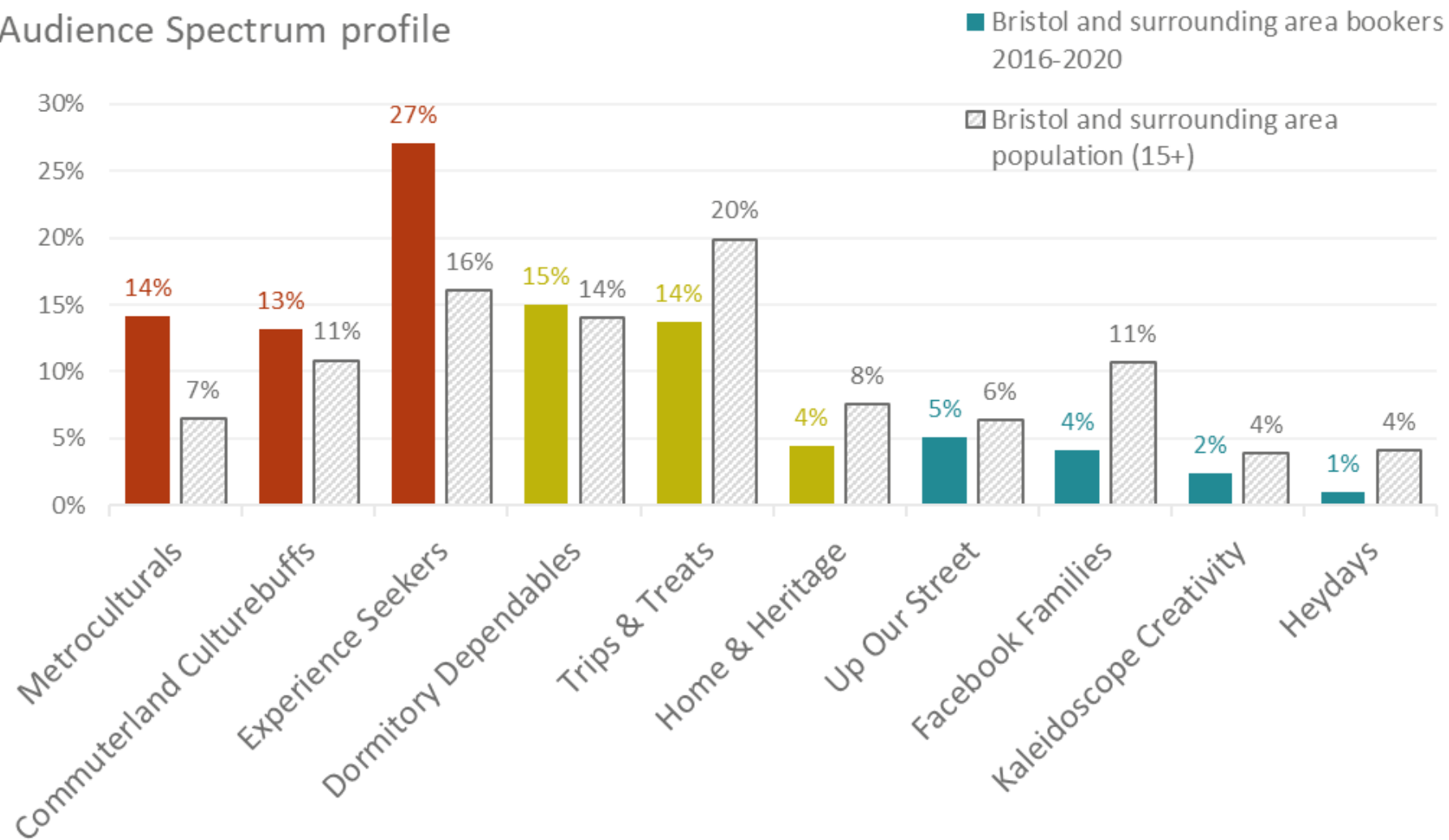
Audience Trends

Ticket sales by year for six most popular artforms



About Local Audiences

Audience Spectrum profile



Audience Trends

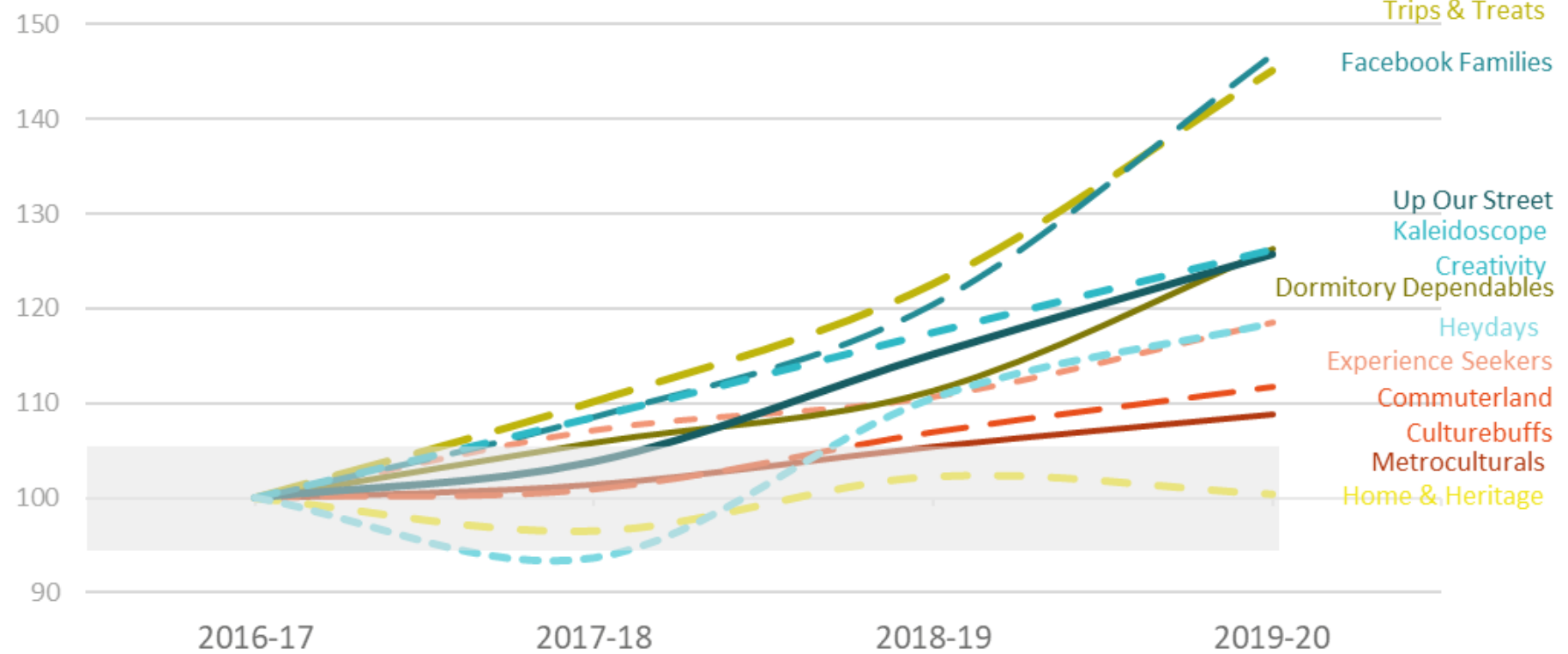
(Lower Income) Families



Older / Higher-engaged



Audience trend - index



Local Audiences

Geography

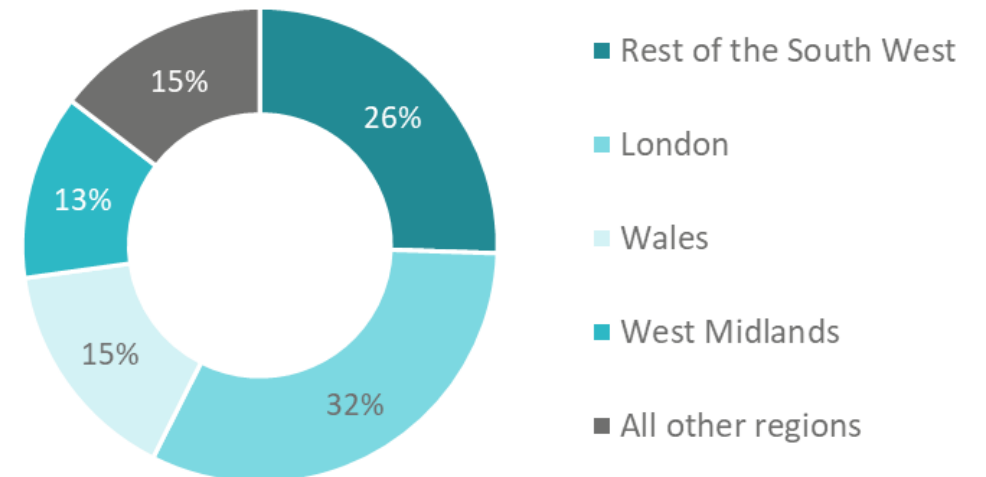
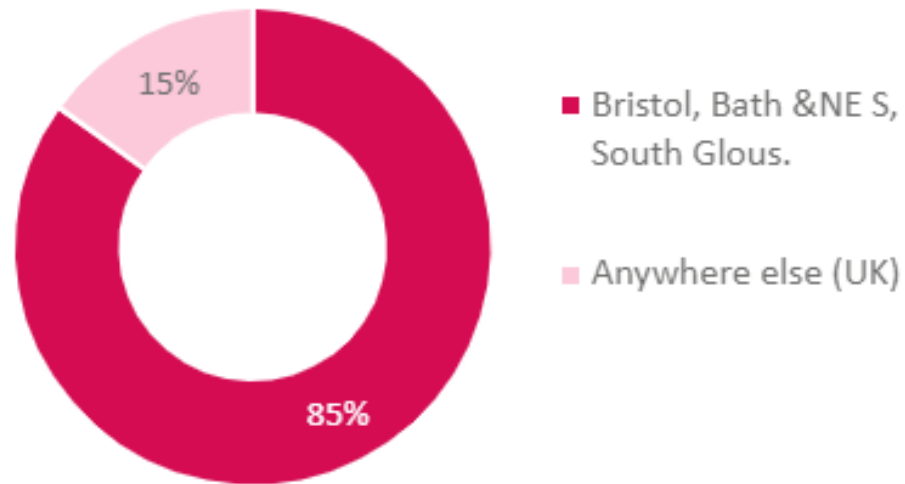
Non-Local Audiences

85% of all tickets were to local organisations
Tickets issued to local residents, in years 2016-17 to 2019-20



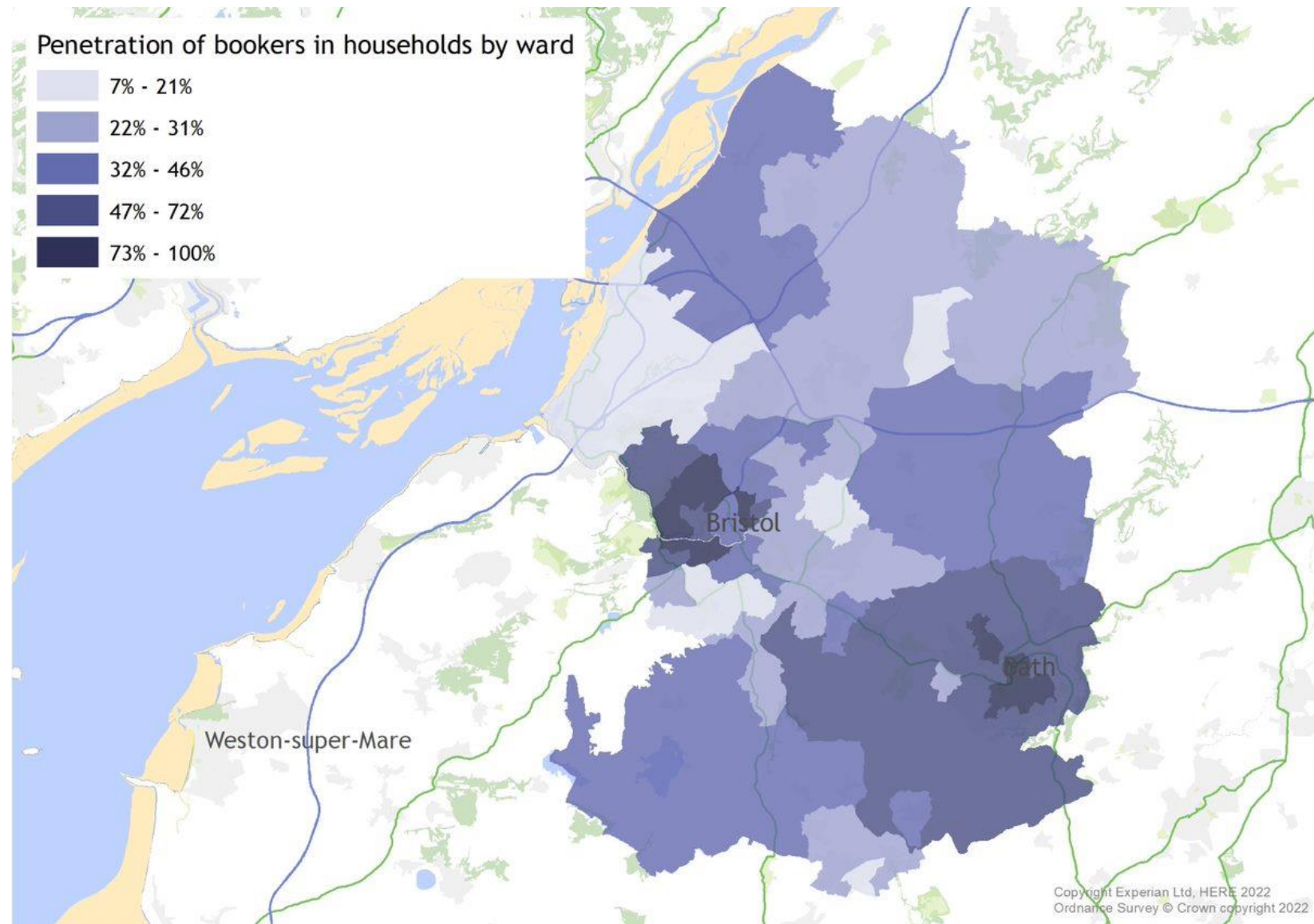
1 in 4 tickets issued elsewhere were in the rest of the South West, and 1 in 3 to London organisations

Tickets issued to local residents by non-local organisations, in years 2016-17 to 2019-20

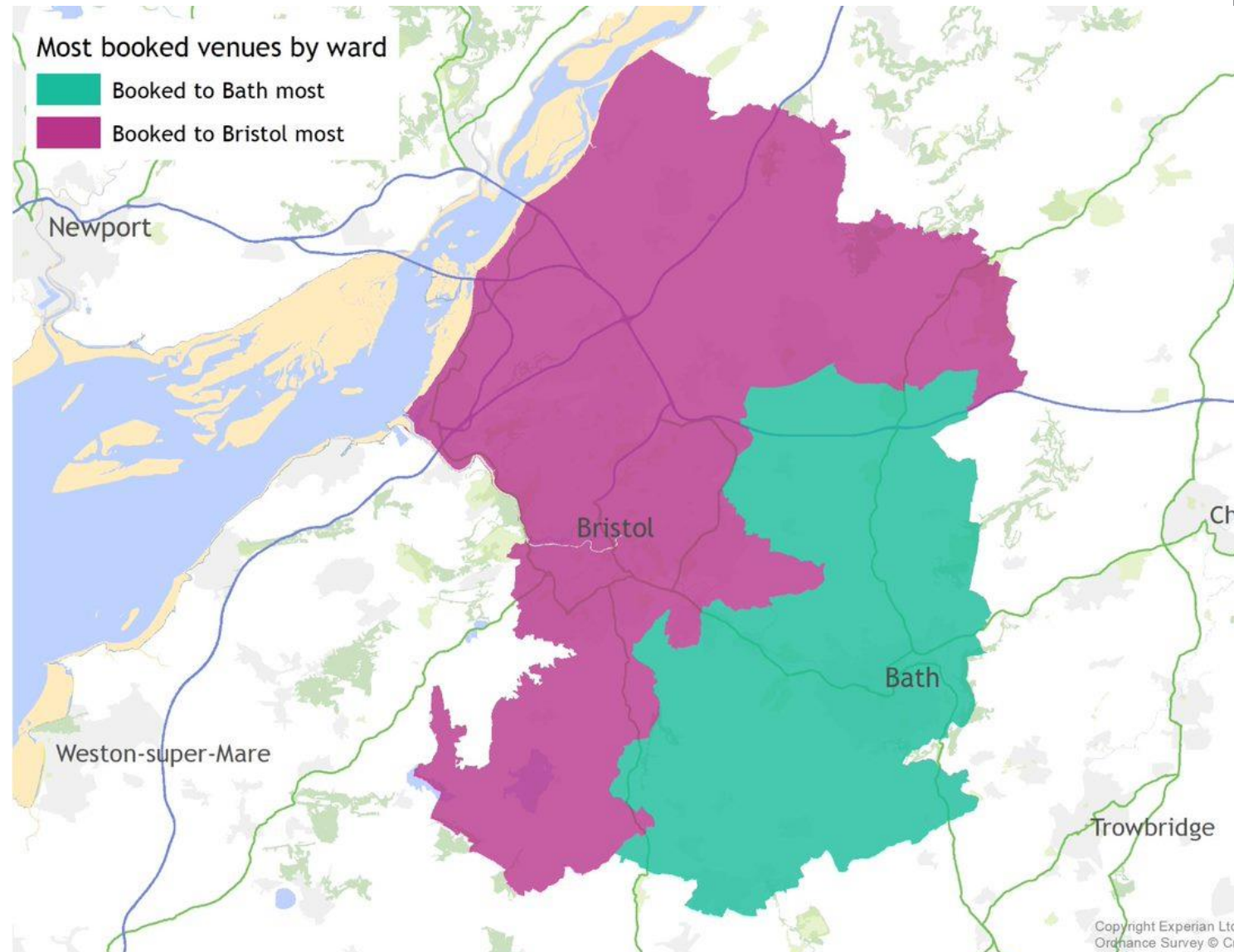


Audience Finder Surveys: 42% of survey respondents from the local area were visiting organisations locally

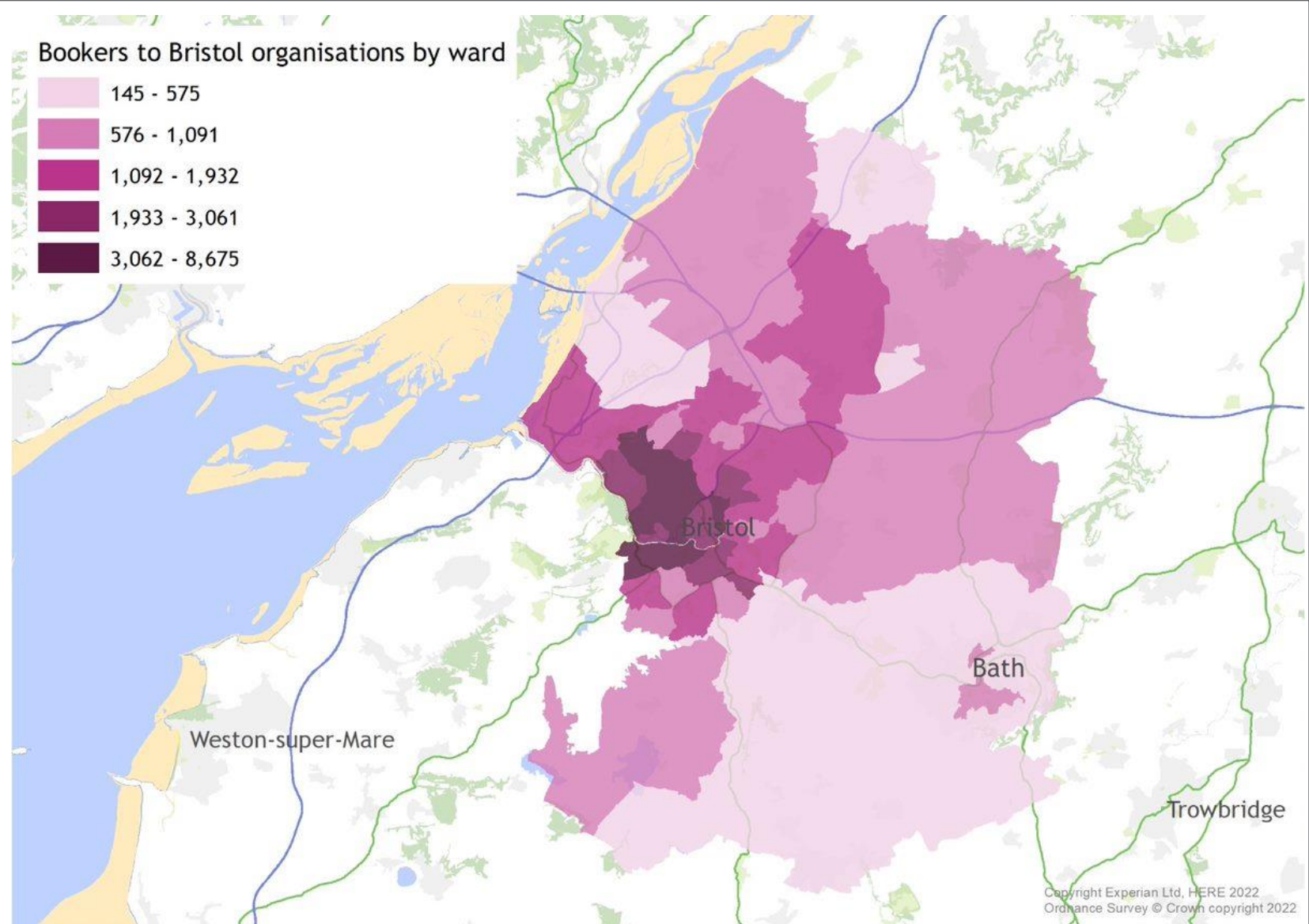
Audience Concentrations



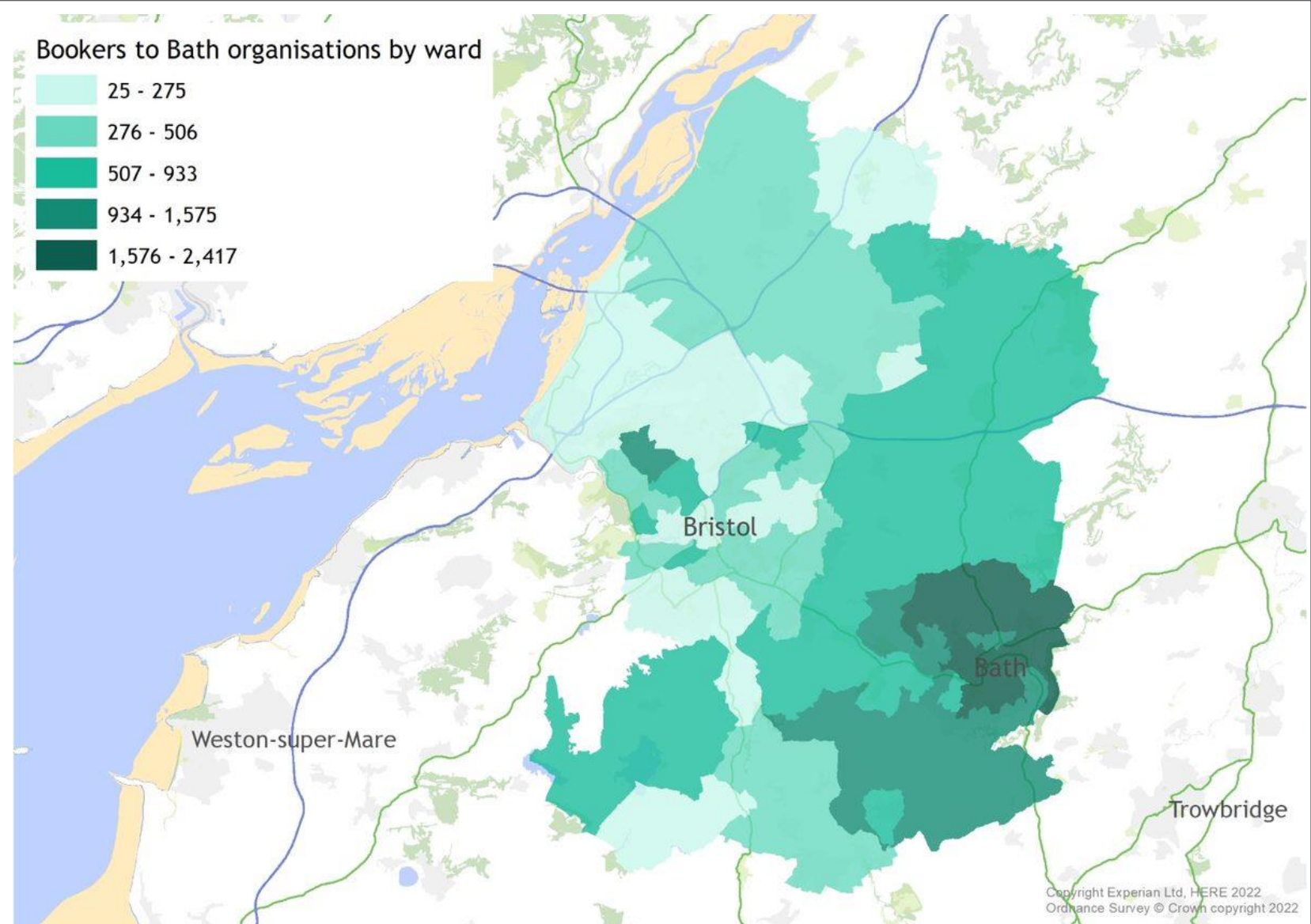
Audience 'Watersheds'



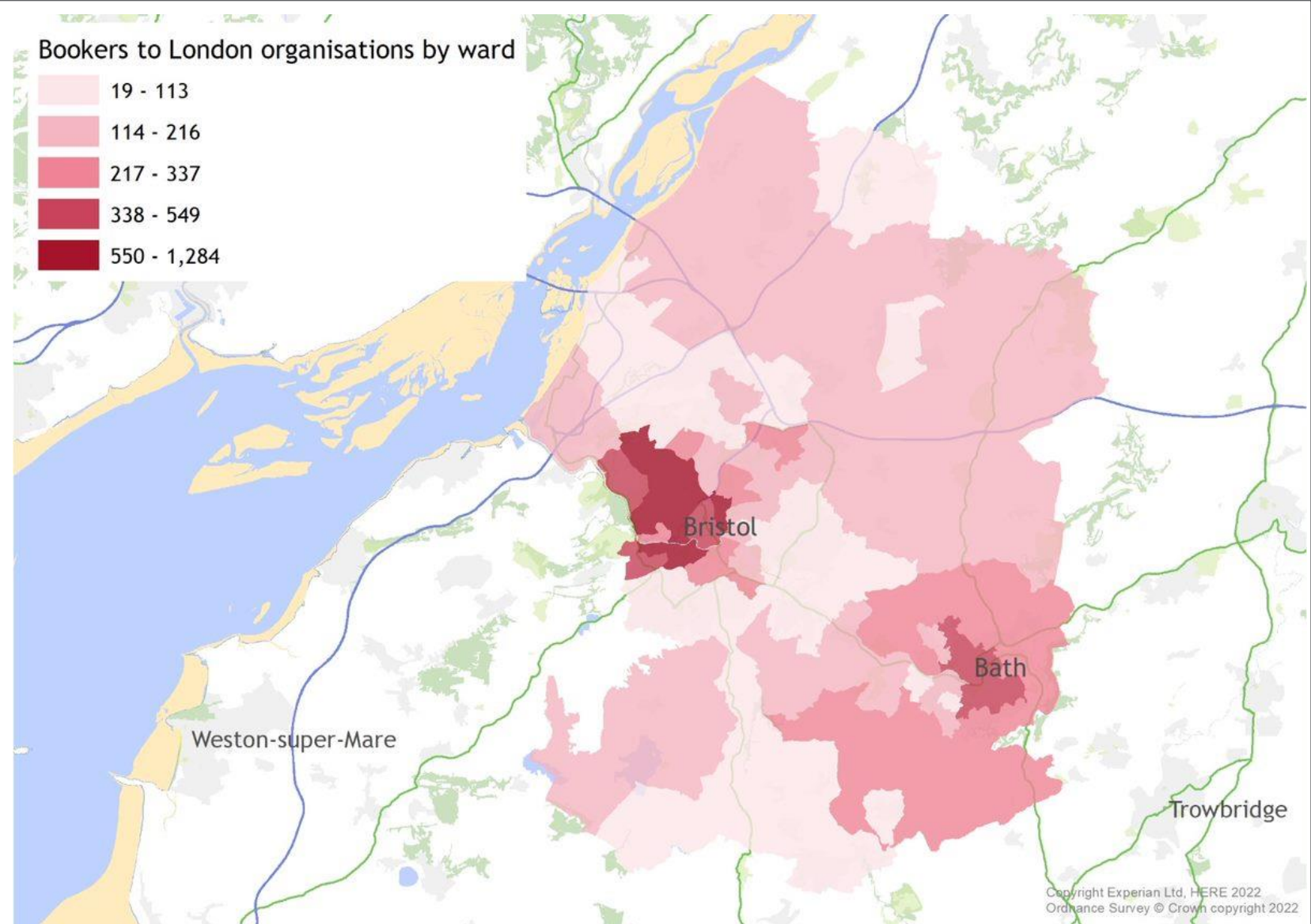
Bookers to Bristol



Audience 'Watersheds'



Audience 'Watersheds'



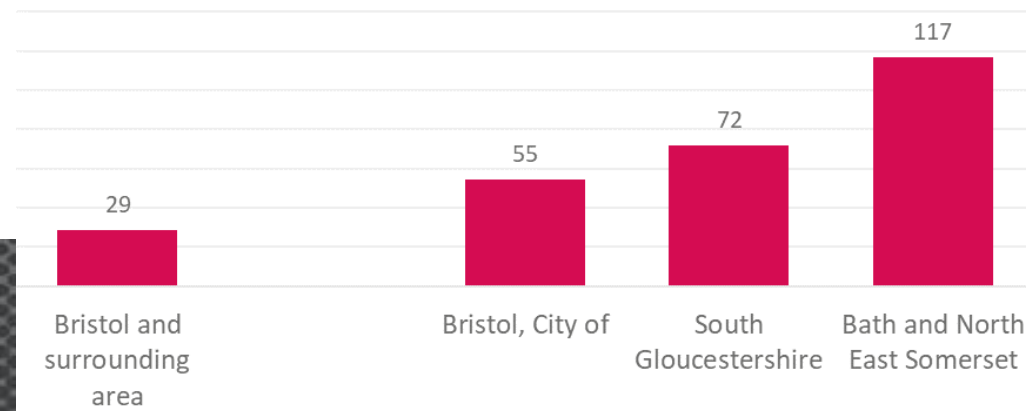
From Surveys...

Visitors from Bath and NE Somerset were more likely to be first-time visitors, visitors from Bristol were most likely to be frequent visitors



Visitors from Bristol stayed most local, while visitors from Bath and NE Somerset travelled the furthest

■ Average drive time travelled (minutes)

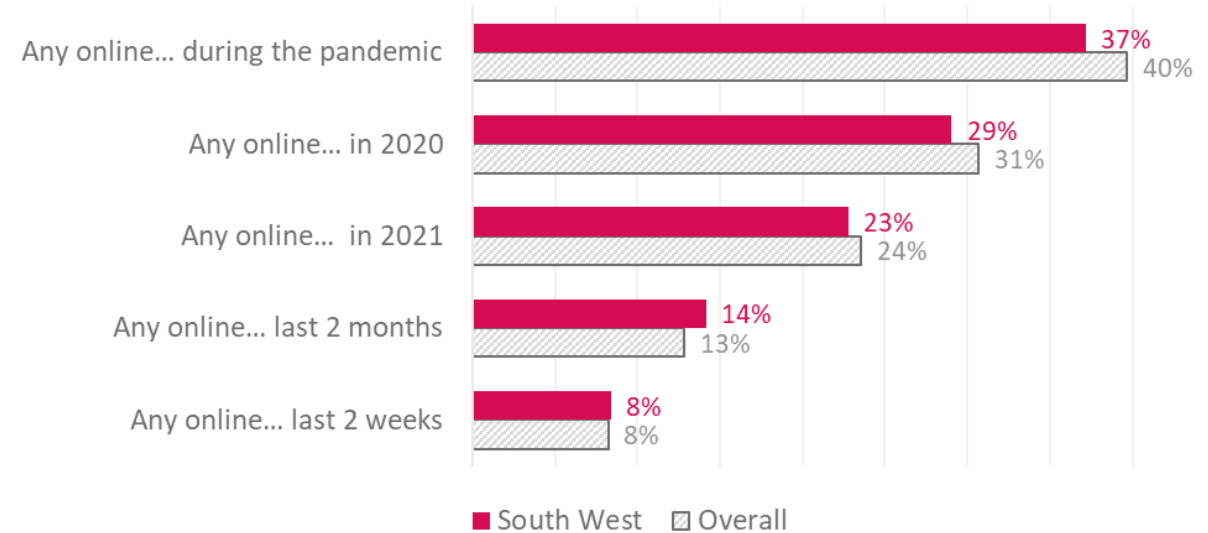
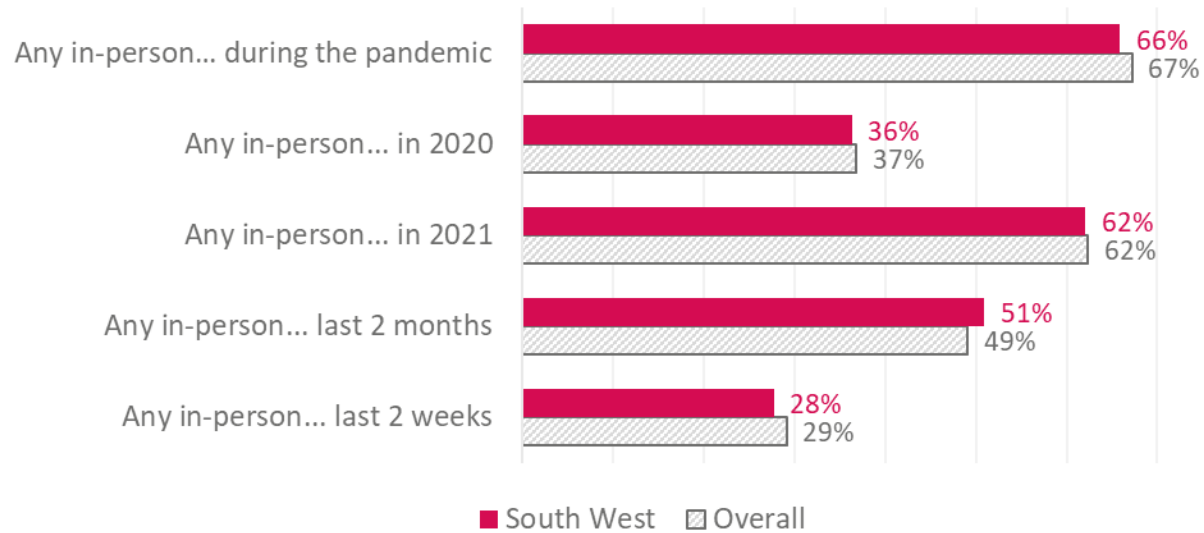


‘Frequent’ = in prev 12 months
‘Lapsed’ = longer ago

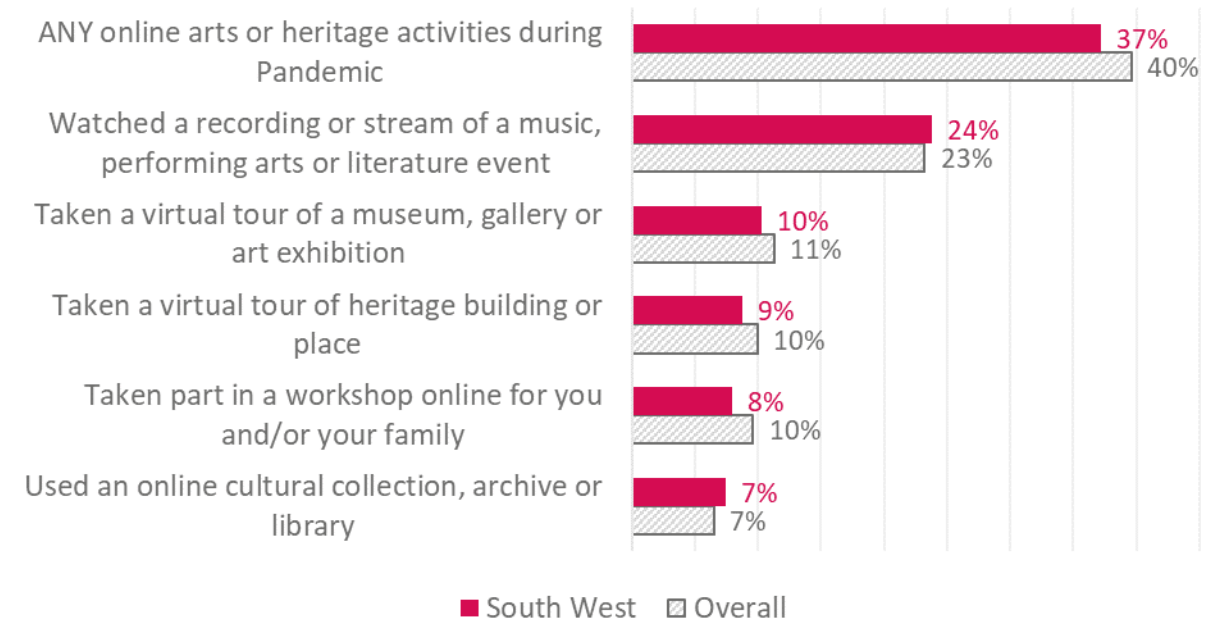
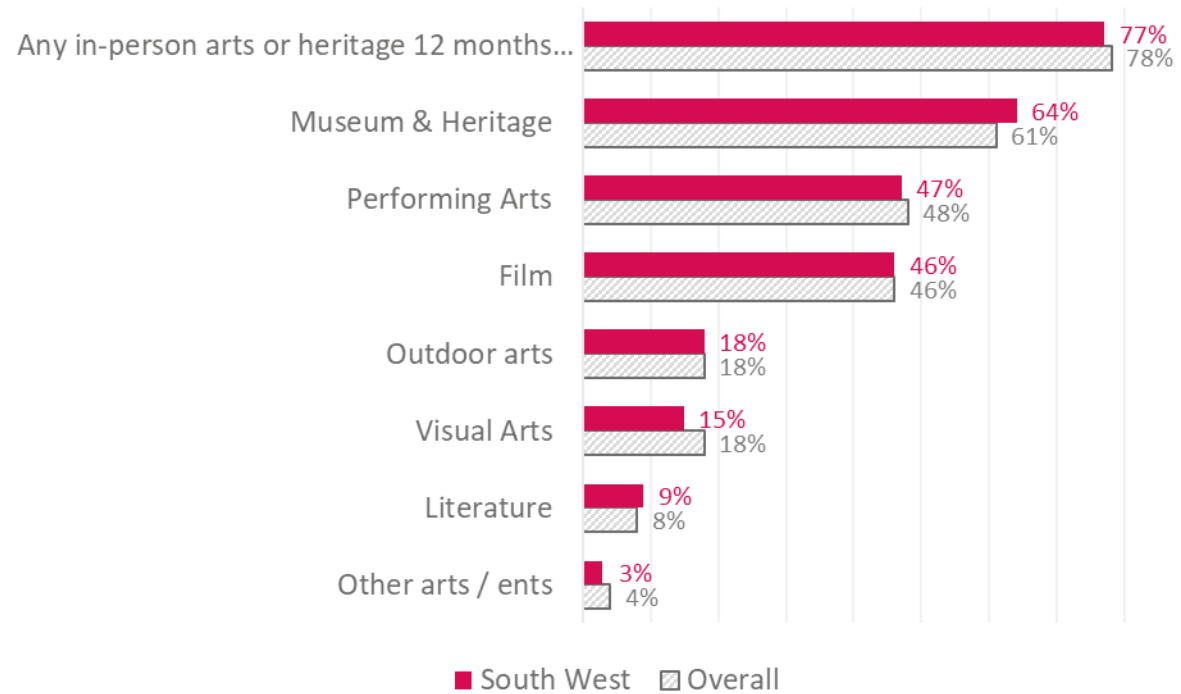
Local Audiences

Engagement (Cultural Participation Monitor)

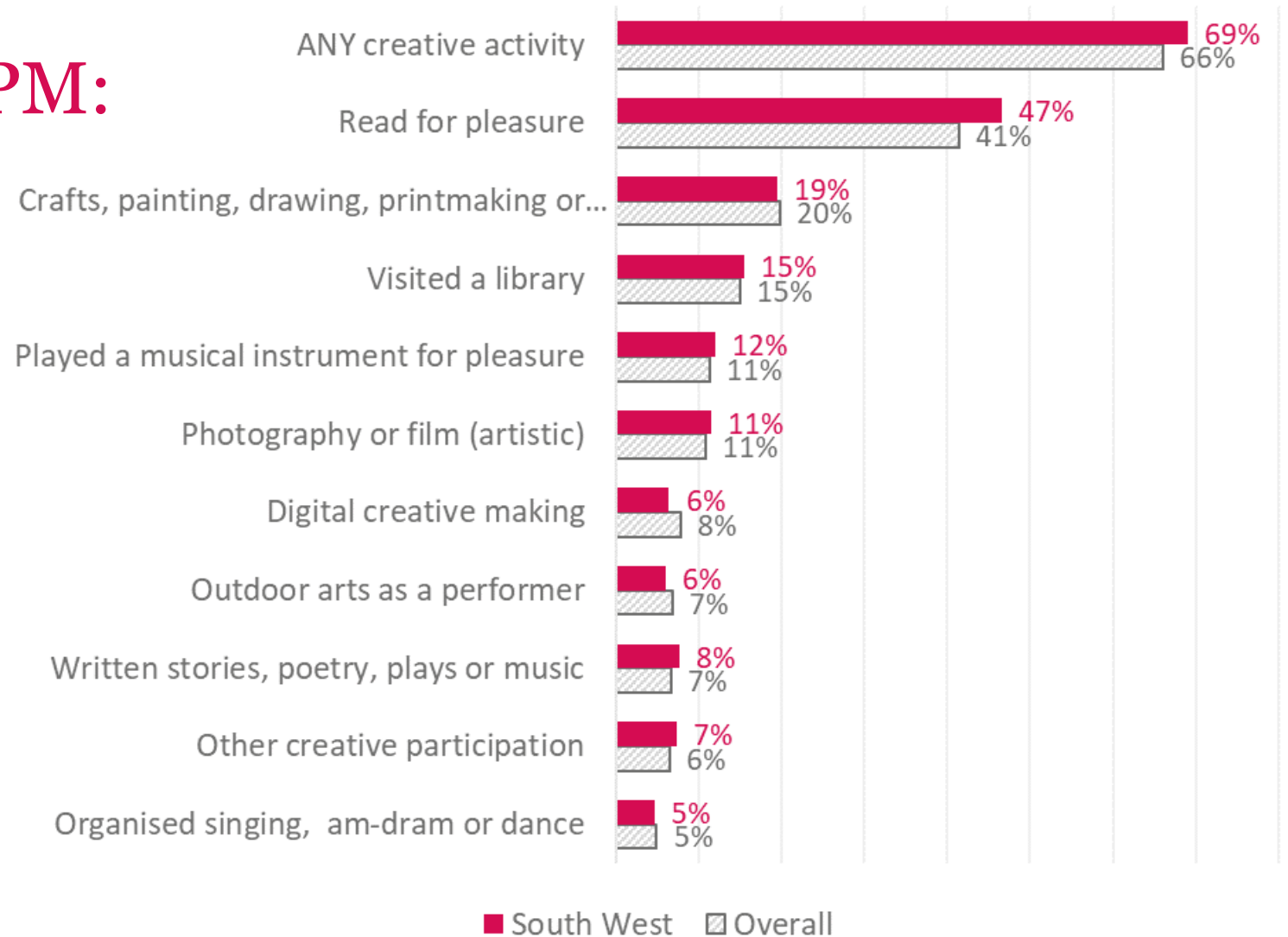
Engagement from CPM: During COVID



Engagement from CPM: During COVID

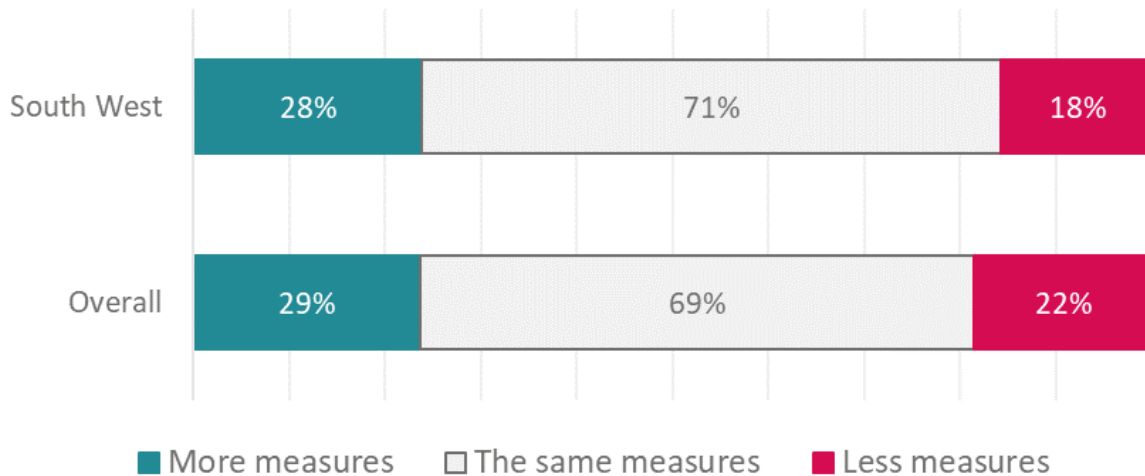


Engagement from CPM: During COVID

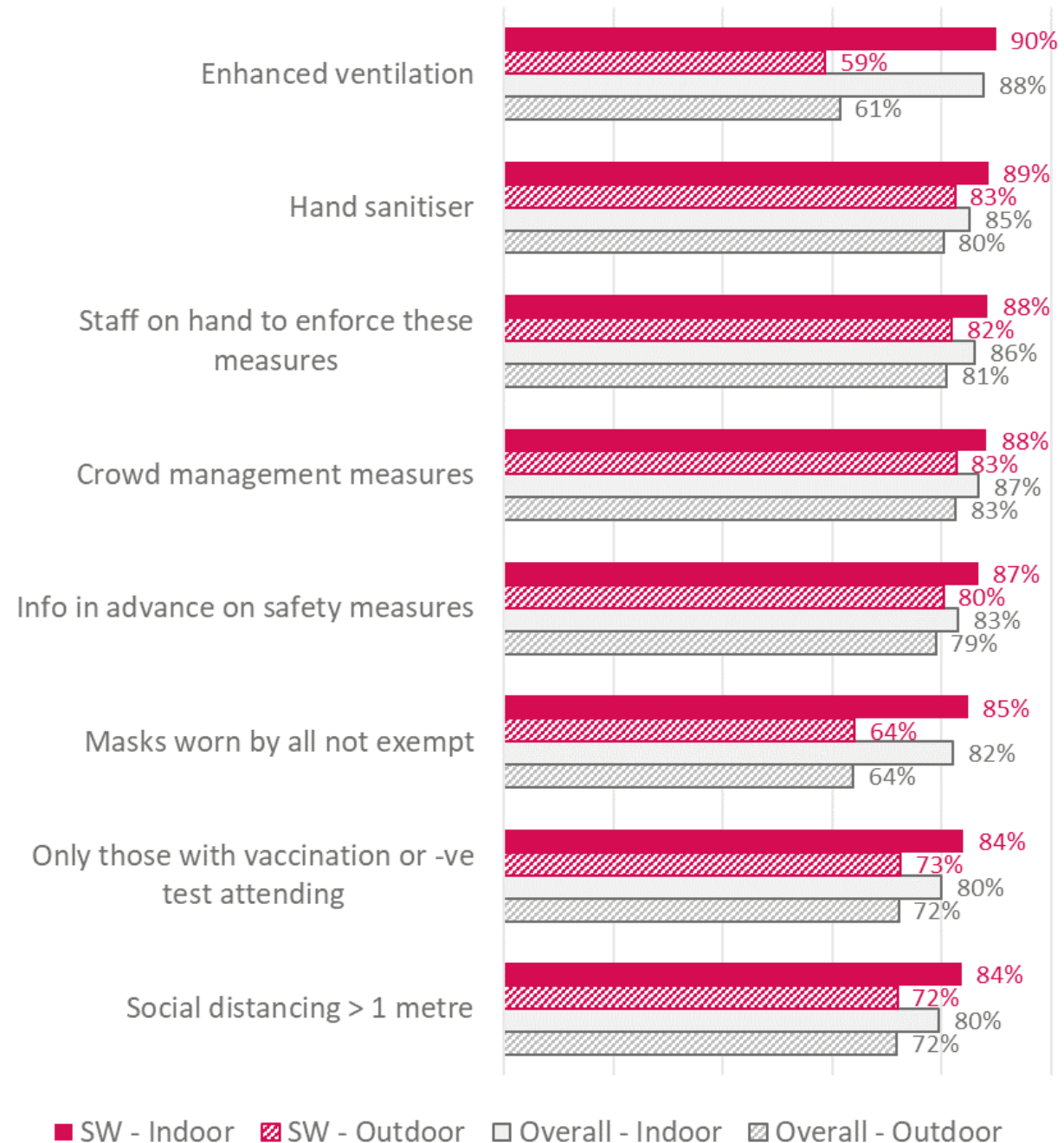


Attitudes to Measures (CPM

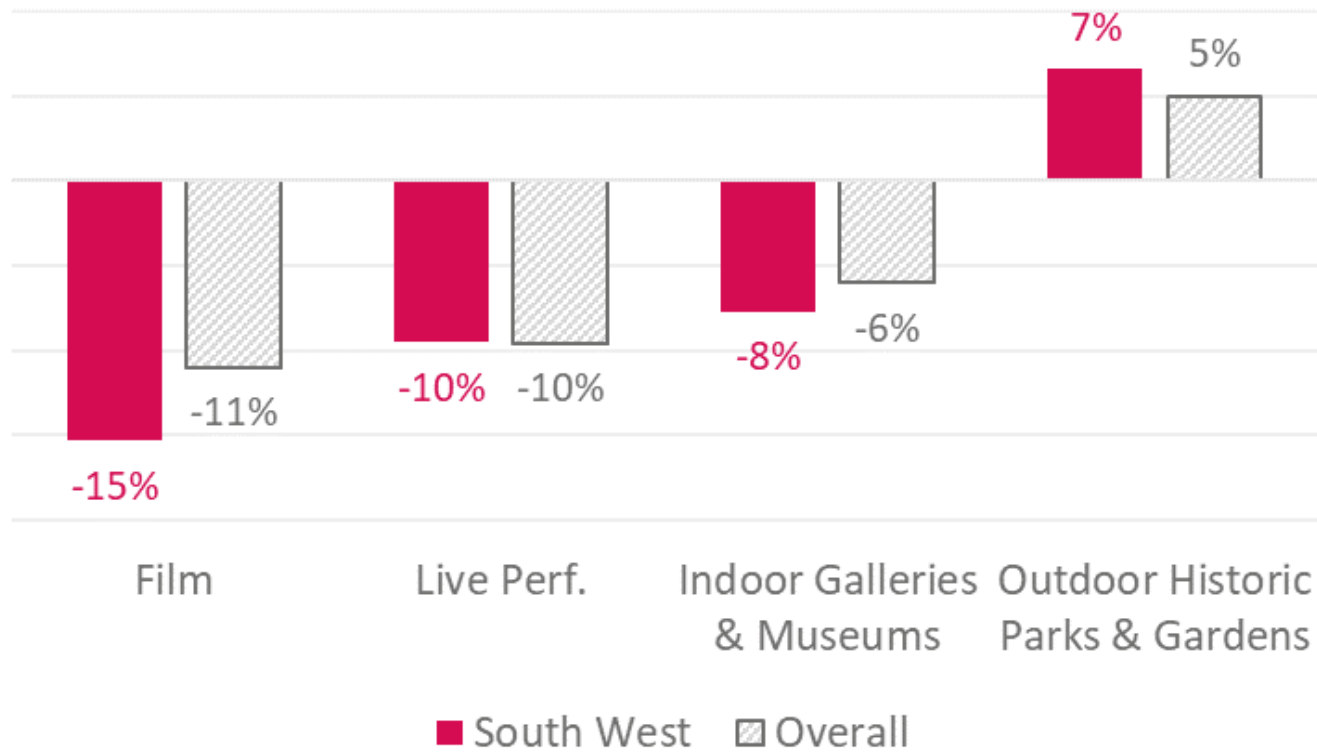
If attending again, would you want...?



% 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 concentrations of Metroculturals / Experience Seekers (esp. Bristol) and mid-engaged families (esp. South Glos.)
- Family groups growing fastest (but good growth overall)
- Bath 'holding its own' re Bristol, but latter has more reach towards London
- SW more cautious re COVID than avg (but...)
- Slightly lower engagement in person/online, but higher participation

From Discussion...:

- Shifts in audiences / different shows selling better/worse than expected: esp. more contemporary work/ younger audiences doing better cf. to what would have been 'safe' core programme, inc. for older audiences.
- For live screenings or other events might be good to consider offers in link with the experiences such as takeaway food offers from the venue or partners working with the venue
- Bath holding its own in the watershed influenced by travel links between Bath and Bristol, which are not always straightforward
- Live music audiences might care less about Covid safety measures

In Conclusion...?

Experience Seekers:

- High in population (esp. Bristol), 1 in 6 of local population.
- Over-represented
- Keener post/during COVID

Dormitory Dependables:

- Represented in line with population; 1 in 7 of local population
- Average re COVID response

Trips & Treats:

- High concentrations (esp. South Glos.), 1 in 5 of local population [ES + DD + TT = 50%]
- Under-represented, but rising

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
 - Audience Finder Onboarding (23/3; 27/4)
 - Museums & Visual Arts (28/4)
 - Christmas Shows (26/5)
- TEA Breaks (13/4 & monthly)

In Development...:

- Audience Spectrum 1.5
- Regional dashboards

Thank you

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

 the audience agency