

West Yorkshire

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



Levels of Information



UK

- Cultural Participation Monitor

Subregion

- Audience Spectrum / Audience Finder

Local Authority

- Audience Spectrum / Audience Finder (ticketing & survey) / Census / TGI

Ward

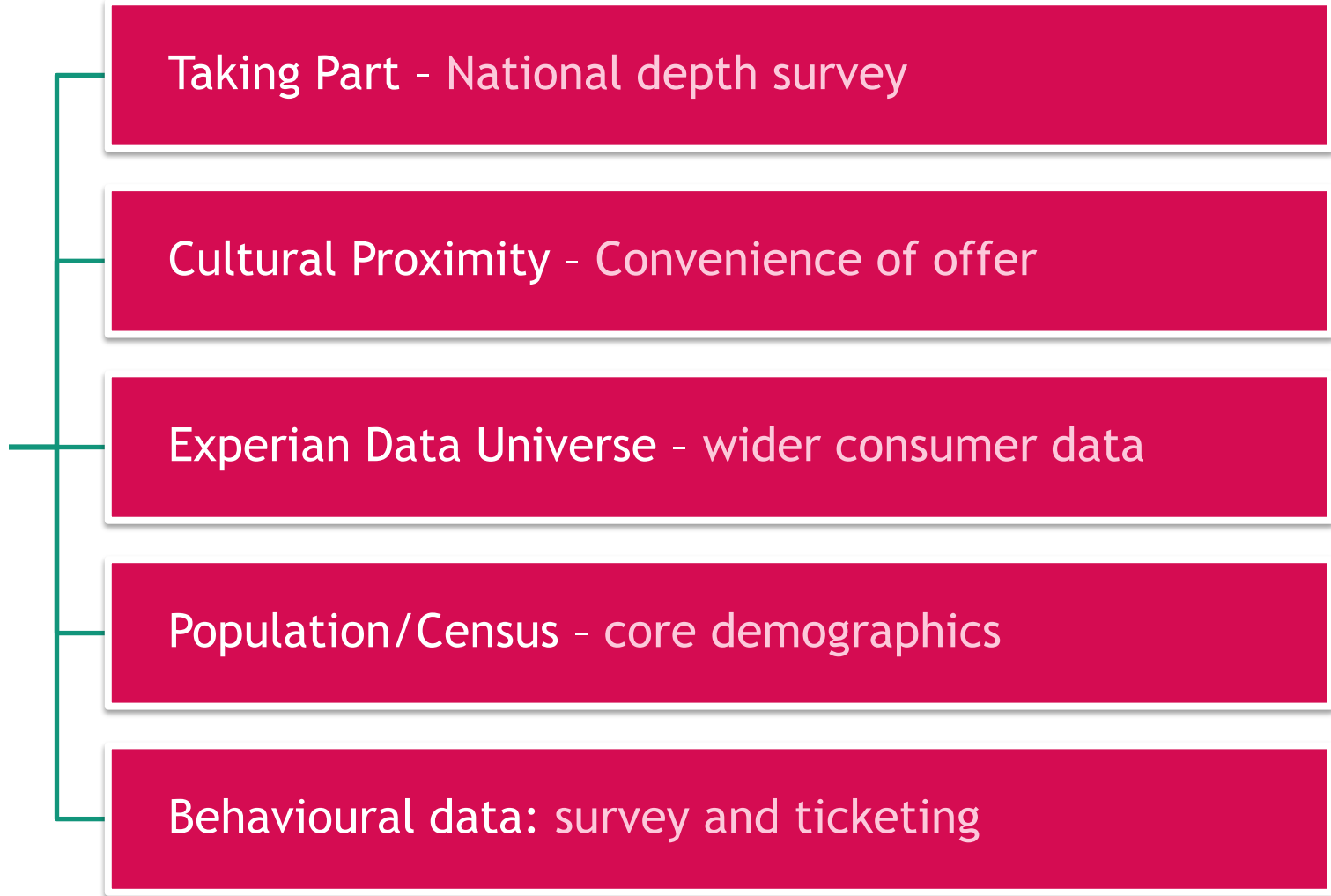
- Audience Spectrum / Audience Finder (ticketing) / APR+

 audience
spectrum

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

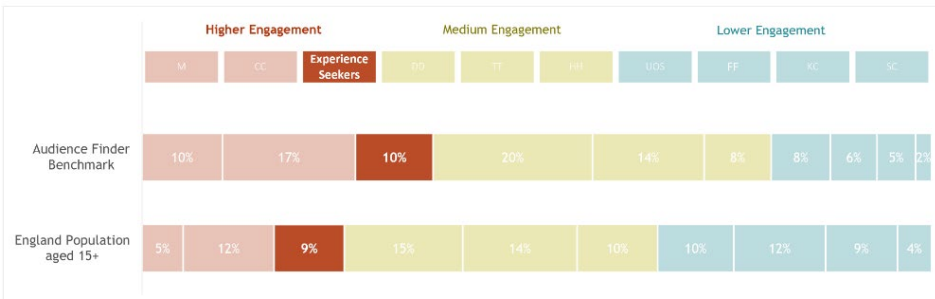
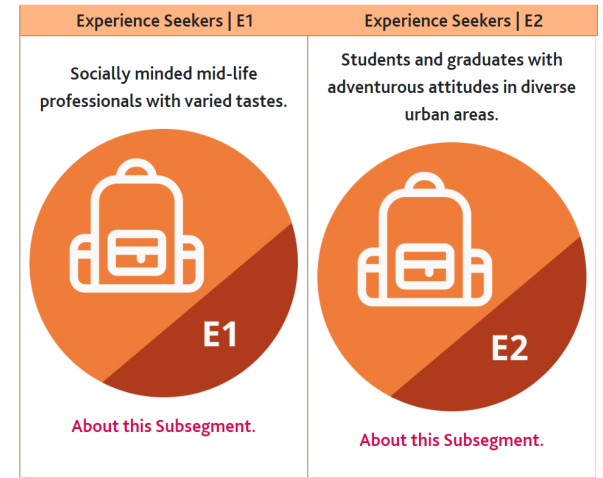


Key Data Sources



Experience Seekers

Highly active, diverse, social and ambitious regular and eclectic arts.



Core Characteristics:

- Profiles:** A younger-leaning, lively and active cohort of busy, mixed prosperity professionals, from a wide range of backgrounds and at a variety of different life stages. [More information.](#)
- Attitudes:** Considering culture to be at the heart of their social life motivates seeking out frequent new experiences with friends, and looking for discounts to support diverse interests. [More information.](#)
- Sectors:** Open to pretty much anything, but with a clear leaning towards the contemporary and culturally specific, this group particularly enjoys immersive and participatory arts. [More information.](#)
- Places:** This predominantly urban group lives within easy reach of a wide range of cultural provision, but is also prepared to travel to experience new activities and places. [More information.](#)
- Digital Activities:** This is the most digitally confident spectrum segment, using the internet to access almost all of their information about events and make decisions regarding what to attend. [More information.](#)
- Communications:** The challenge is grabbing their attention amongst the plethora of offers that might appeal, so prominent listings and engaging online and social media content are crucial. [More information.](#)

Key Statistics:

Activity Level	Highly Cultural Engagement
Spectrum Ranking	3/ 10
Audience Finder Benchmark	10% of Active Audiences
Population Prevalence	9% of UK Population

- Experience Seekers
 - 1. Profile
 - 2. Attitude
 - 3. Sectors
 - 4. Places
 - 5. Digital Activities
 - 6. Communications
 - 7. Subsegments | E1 & E2

Local Population

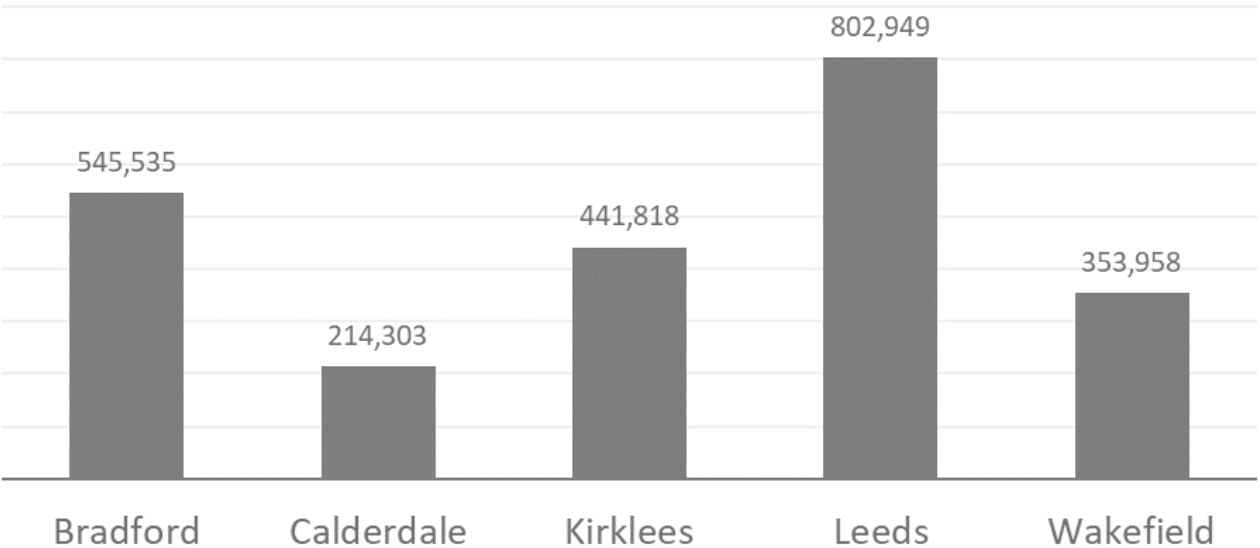
Local Area and Population

- Overview of demographics
- Audience Spectrum, inc. maps:
 - Largest segment
 - Each of the three largest segments



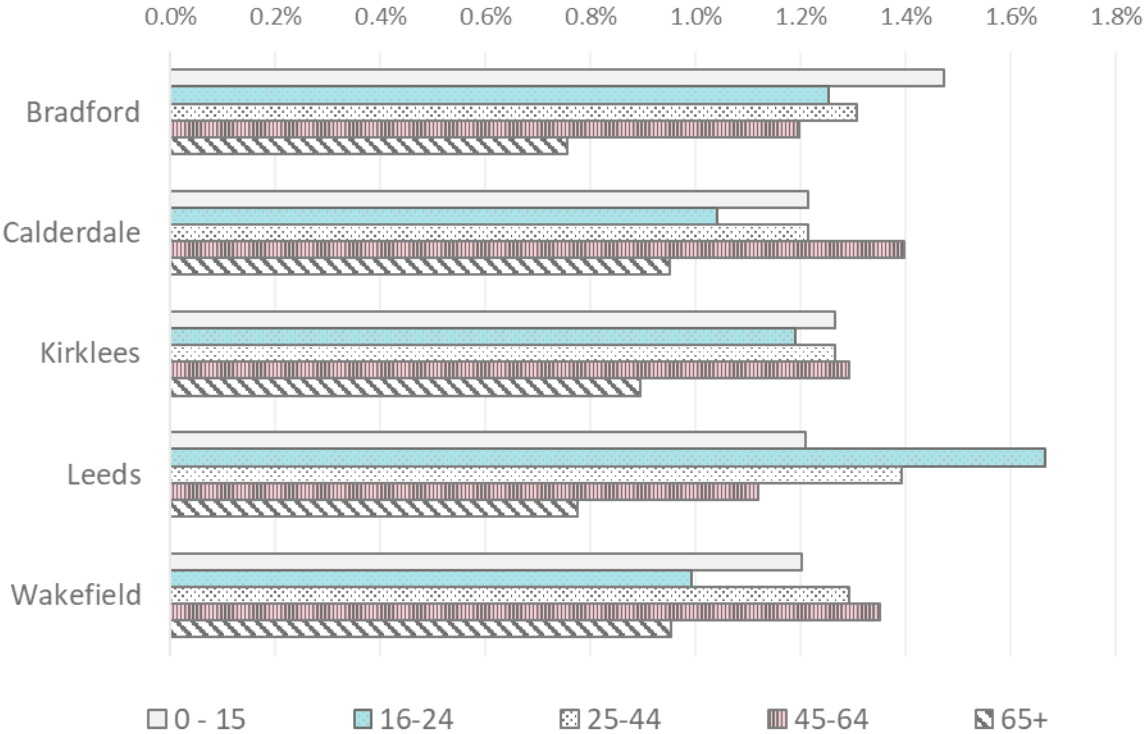
Population data – comparing the local areas

Population estimate 2020



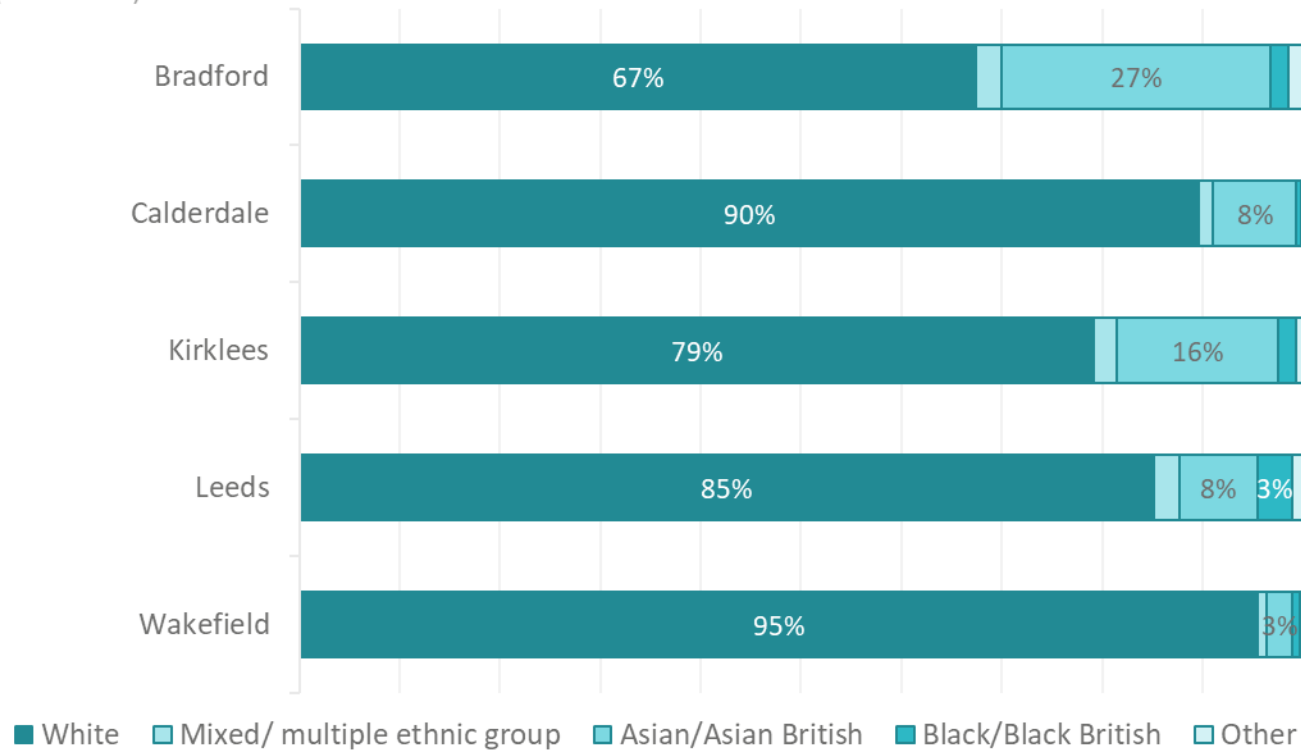
Age Profile

% per year in age bracket
[65+ set at 20 years for cf.]

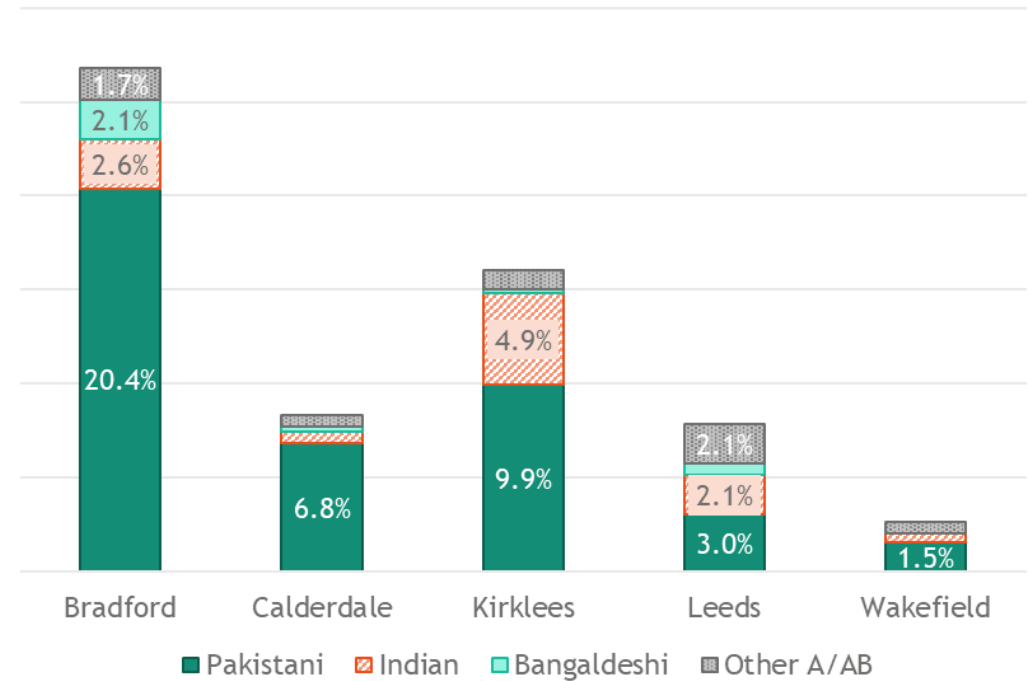


Population data – comparing the local areas

Ethnicity
(2011 data)

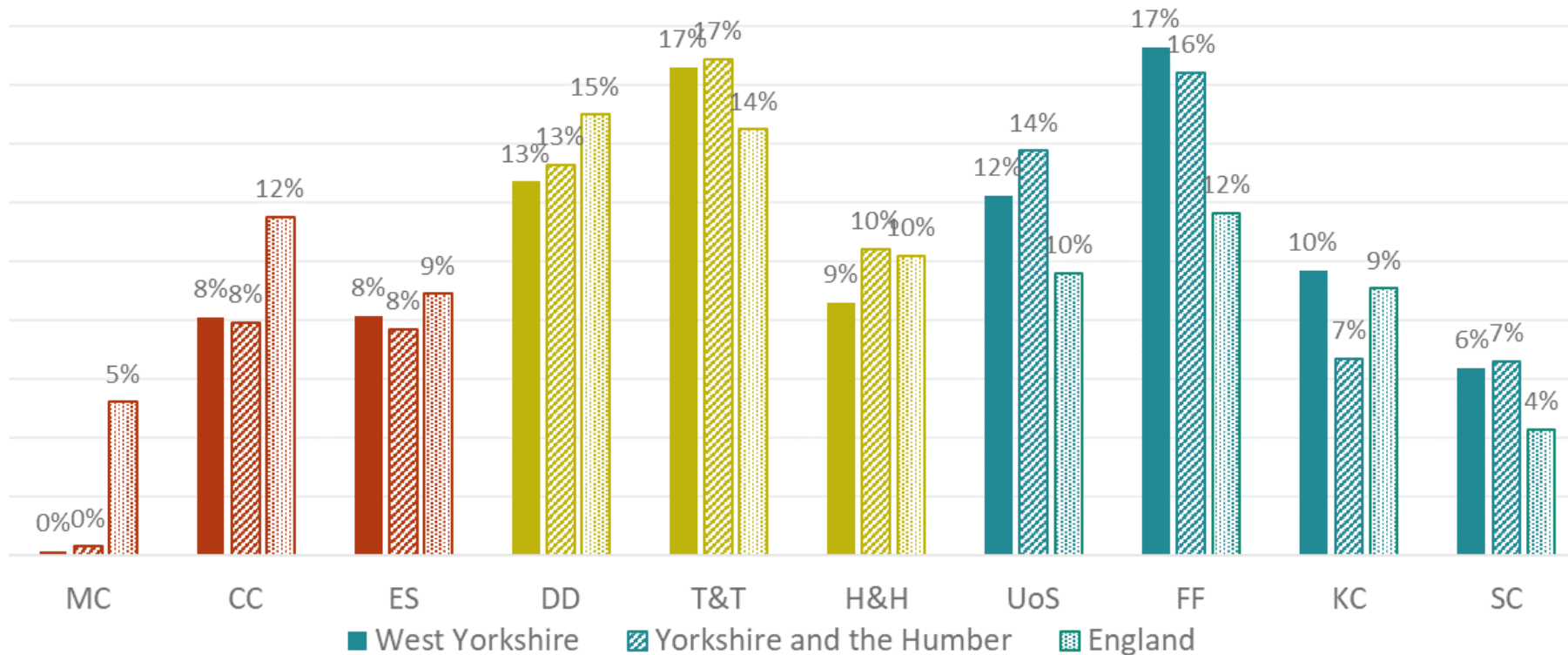


% Population by Specific Asian/Asian British Ethnicities



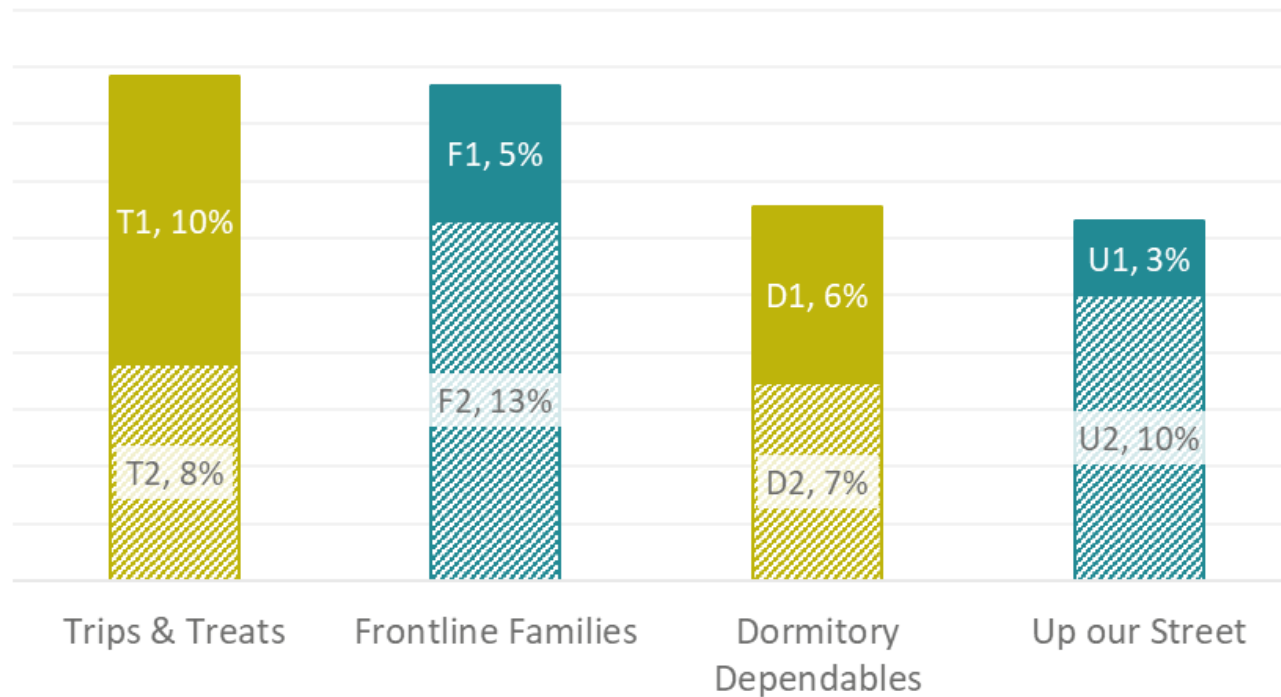
Overall Population Audience Spectrum Profile

46% of the West Yorkshire population are T&T, UoS or FF
Audience Spectrum profile for the base population (adults 15+)



Overall Audience Spectrum Profile: Enhanced

Top Audience Spectrum Segments - Enhanced



T1: Settled suburban families with established lifestyles.

T2: Modern young families, building a comfortable future.

F1: Older families, getting by despite challenges.

F2: Younger, cash-strapped families and couples starting out.

D1: Settled, comfortable residents, enjoying regional life.

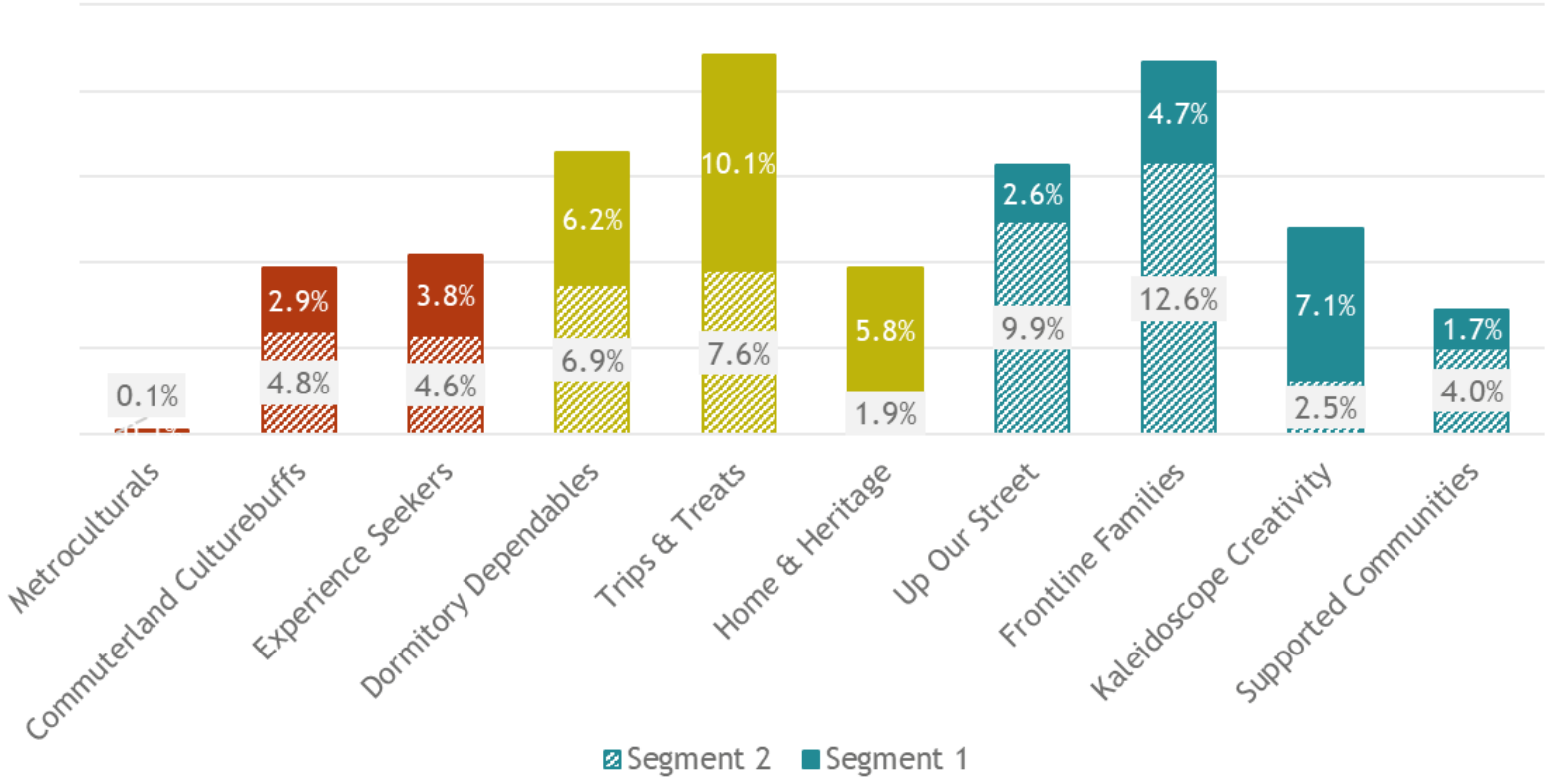
D2: Commuter-town families, investing for the future.

U1: Middle-aged inhabitants of semis on the edge of town.

U2: Older residents of terraces and flats in built up areas.

Overall Audience Spectrum Profile: Enhanced

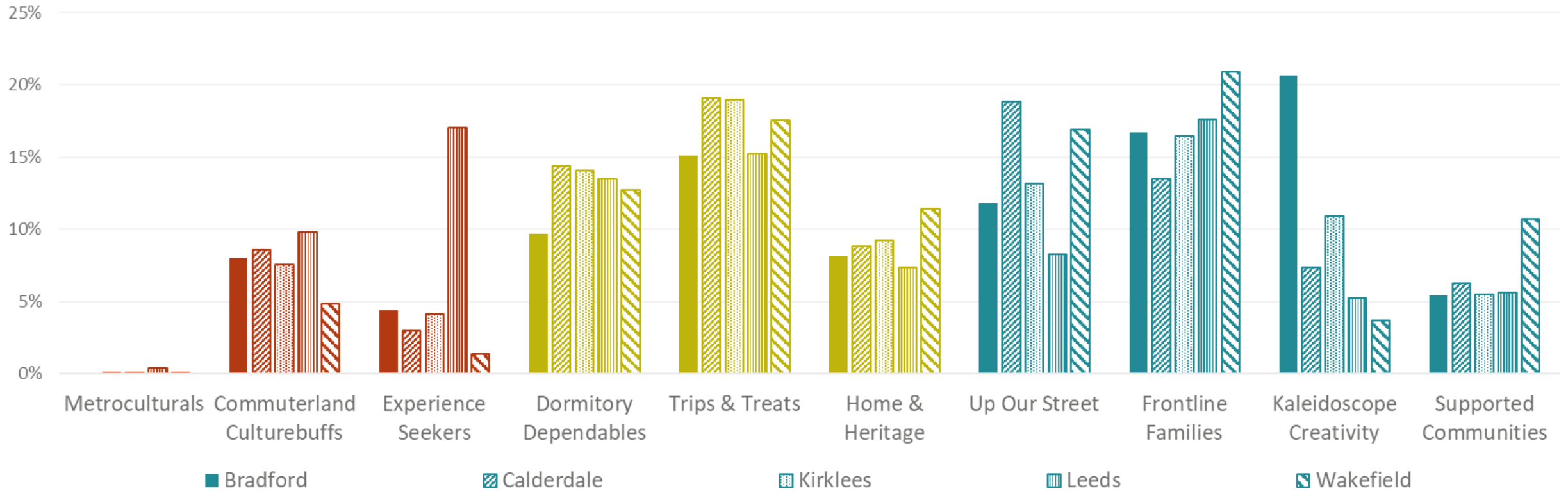
West Yorkshire Enhanced Audience Spectrum Profile



For details of subsegments, see <https://theaudienceagency.org/audience-finder-data-tools/audience-spectrum>

Overall Population Audience Spectrum Profile

Experience Seekers are high in Leeds, Kaleidoscope Creativity in Bradford, Supported Communities in Wakefield

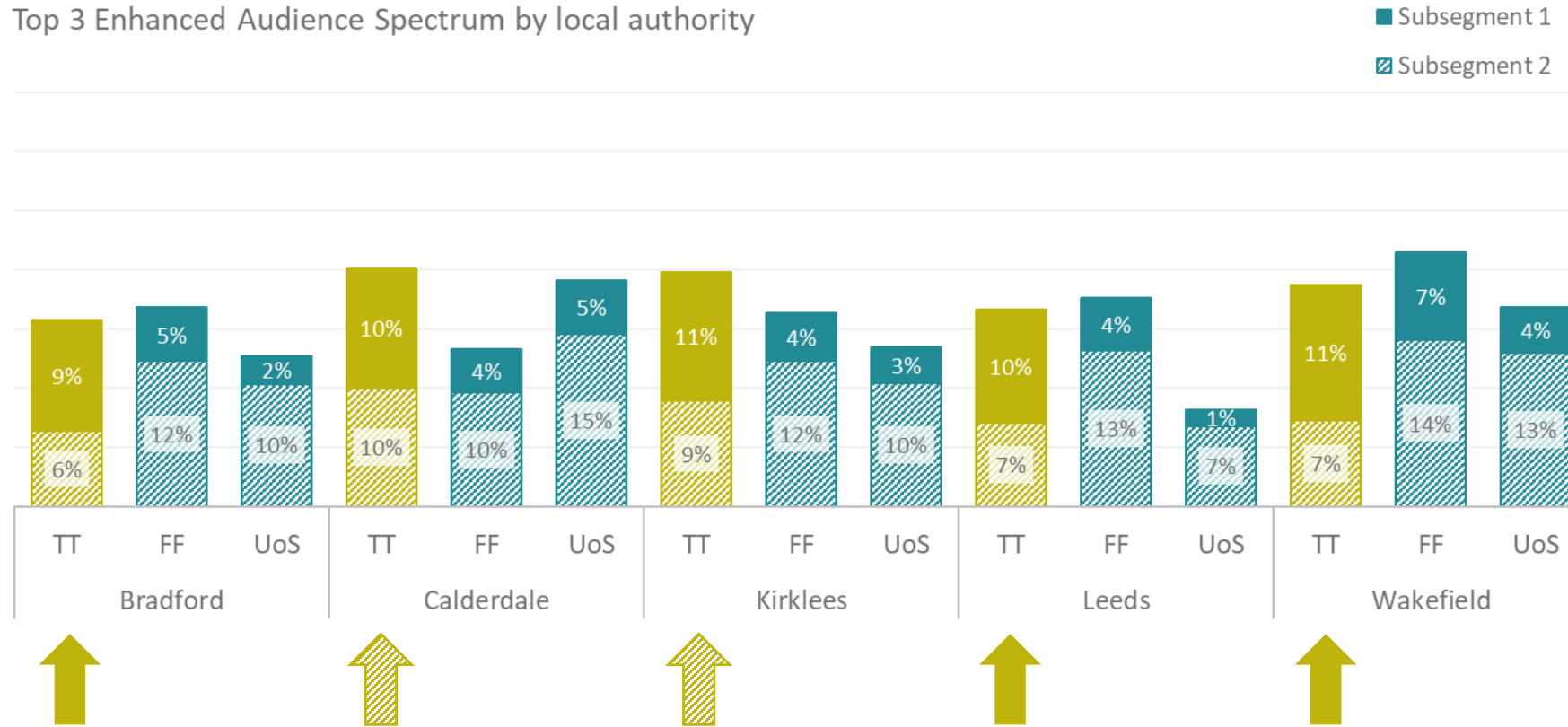


Wards with Highest % by Audience Spectrum

Segment	Highest	Second Highest	Third Highest
Metroculturals	Weetwood (5%)	Roundhay (3%)	Hunslet & Riverside (1%)
Commuterland Culturebuffs	Harewood (54%)	Wharfedale (50%)	Ilkley (47%)
Experience Seekers	Headingley & Hyde Park (91%)	Little London & Woodhouse (72%)	Kirkstall (40%)
Dormitory Dependables	Moortown (40%)	Kirkburton (32%)	Guiseley & Rawdon (31%)
Trips & Treats	Stanley & Outwood East (39%)	Pudsey (35%)	Morley North (32%)
Home & Heritage	Garforth & Swillington (24%)	Craven (23%)	Wakefield Rural (22%)
Up Our Street	Castleford Central & Glasshoughton (43%)	Todmorden (34%)	Sowerby Bridge (33%)
Frontline Families	Gipton & Harehills (58%)	Tong (47%)	Killingbeck & Seacroft (45%)
Kaleidoscope Creativity	Manningham (84%)	Bradford Moor (81%)	Toller (80%)
Supported Communities	Airedale & Ferry Fryston (22%)	Hemsworth (18%)	Knottingley (18%)

Audience Spectrum Profile by Local Area – Top Segments Enhanced

Top 3 Enhanced Audience Spectrum by local authority



T1: Settled suburban families with established lifestyles.

T2: Modern young families, building a comfortable future.

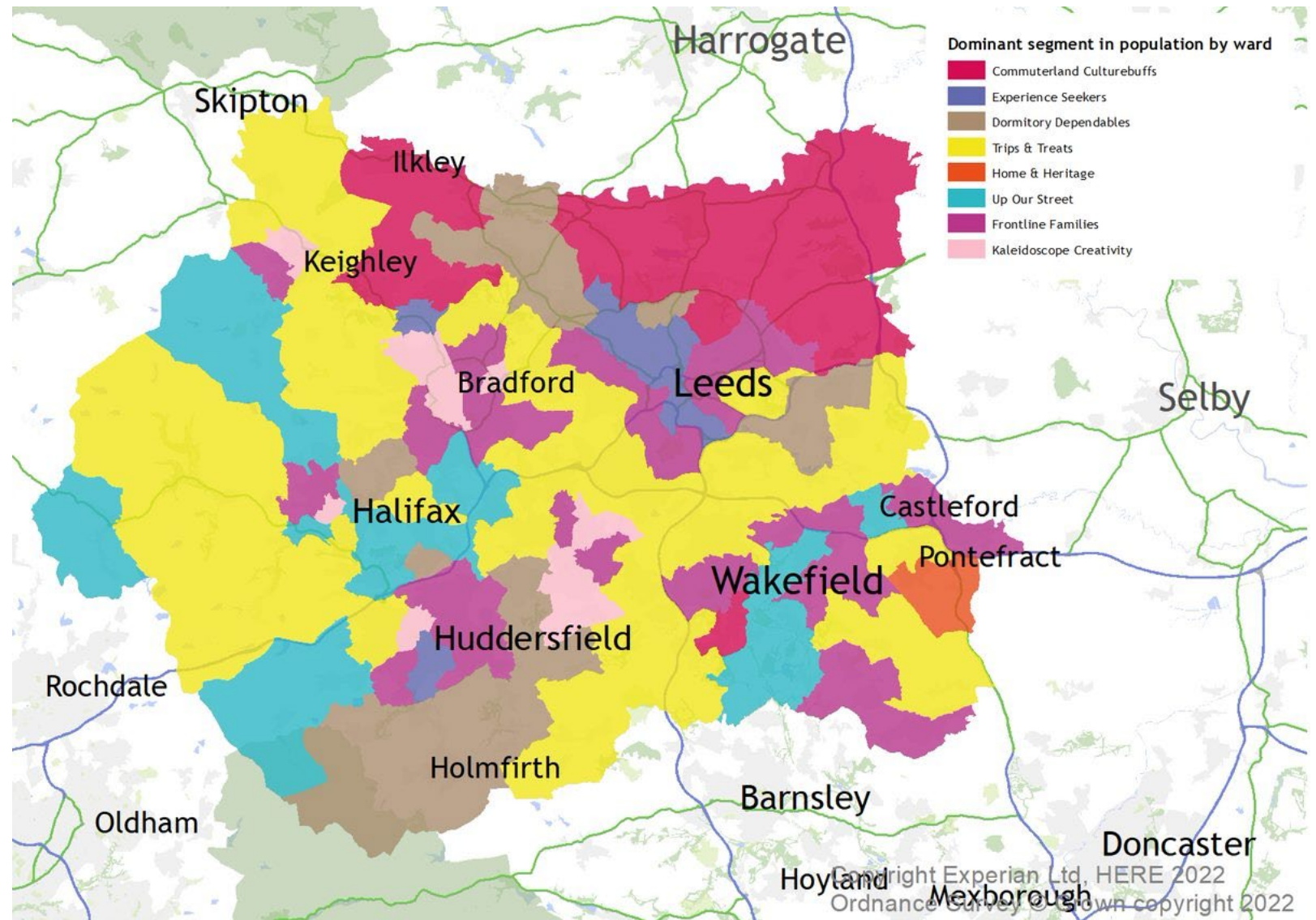
F1: Older families, getting by despite challenges.

F2: Younger, cash-strapped families and couples starting out.

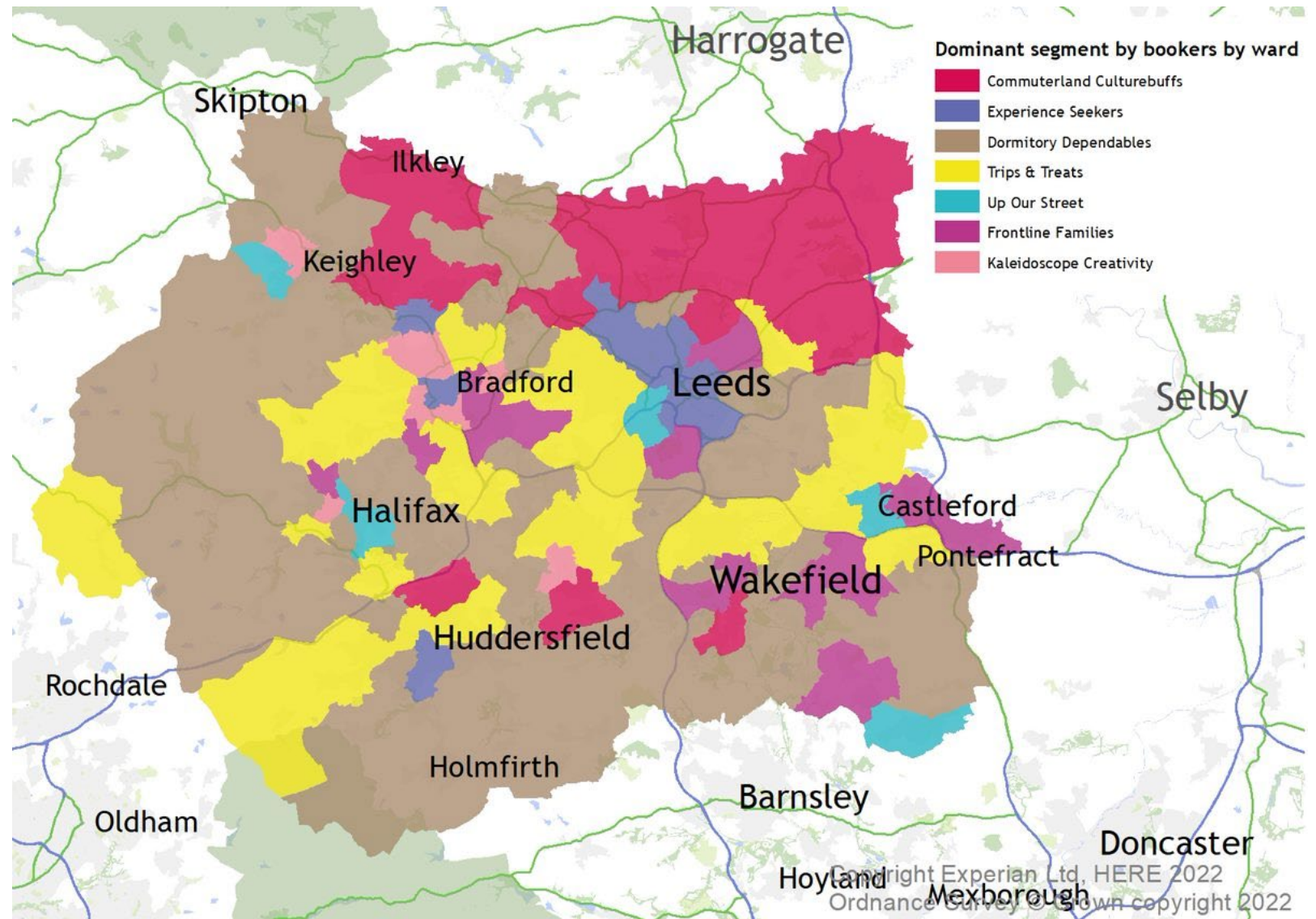
U1: Middle-aged inhabitants of semis on the edge of town.

U2: Older residents of terraces and flats in built up areas.

Dominant Audience Spectrum Segment by Ward - Population

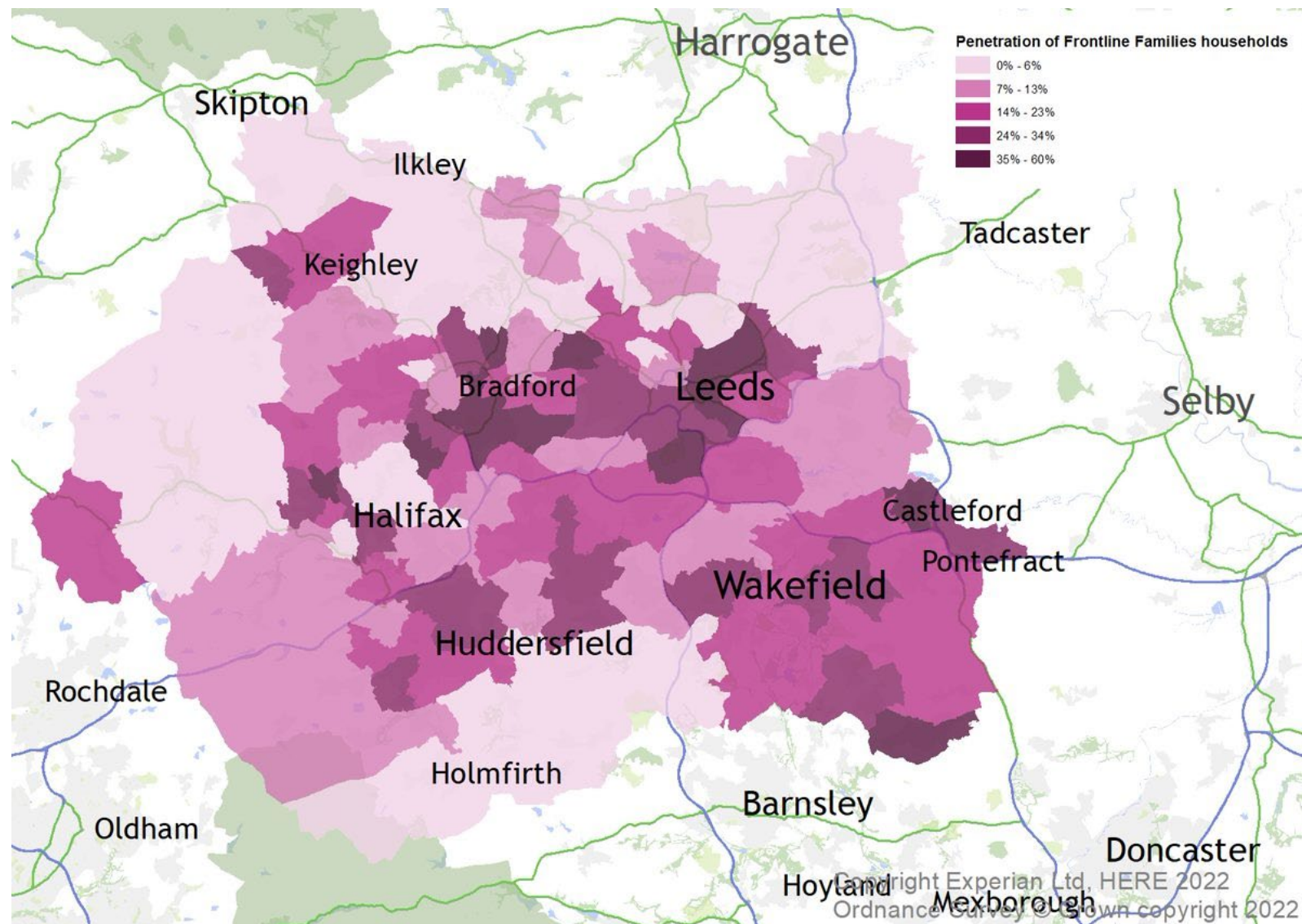


Dominant Audience Spectrum Segment by Ward - Bookers



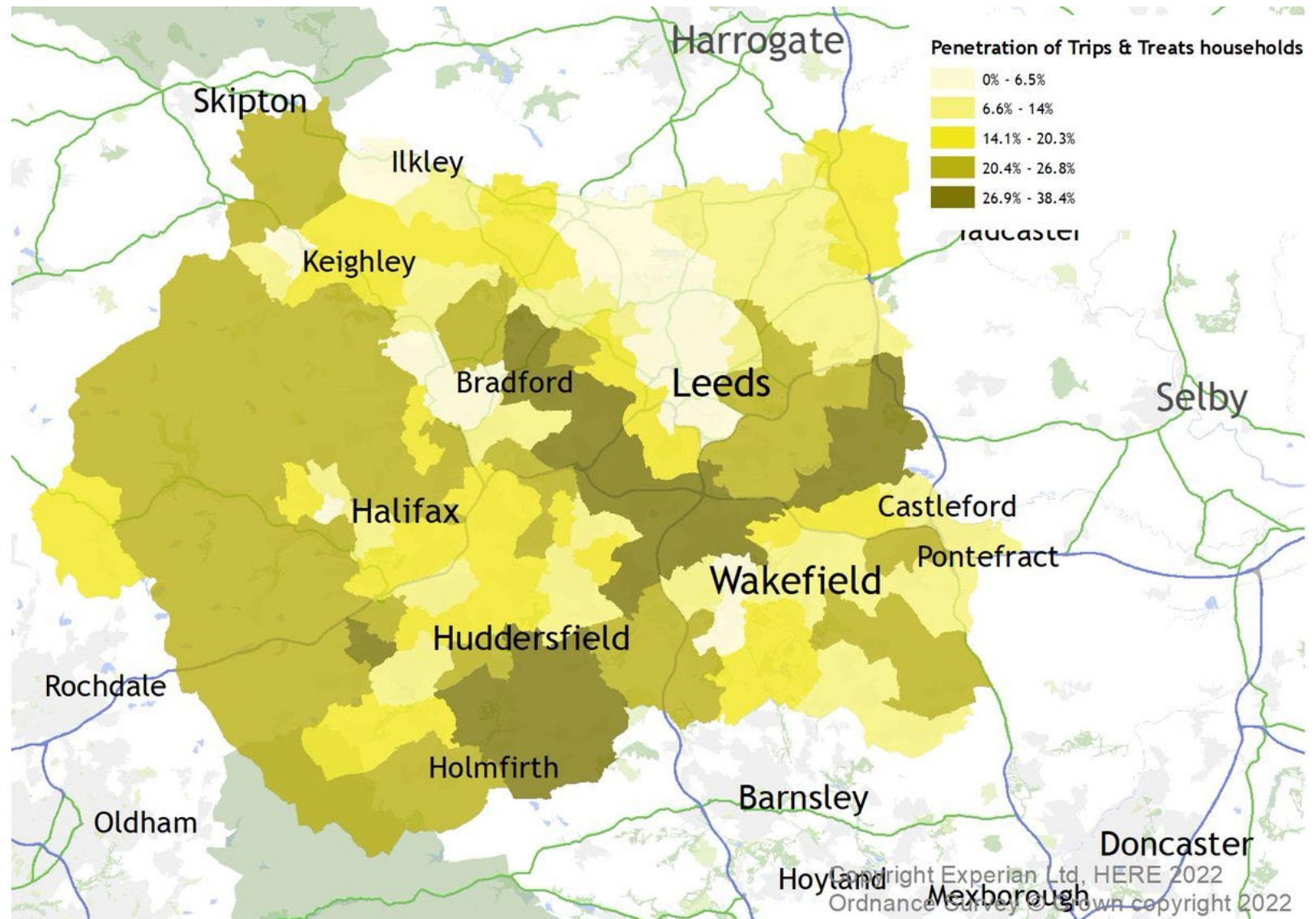
Frontline Families Population by Ward

Frugal, semi-urban renting families, light on arts and culture but heavy on community.



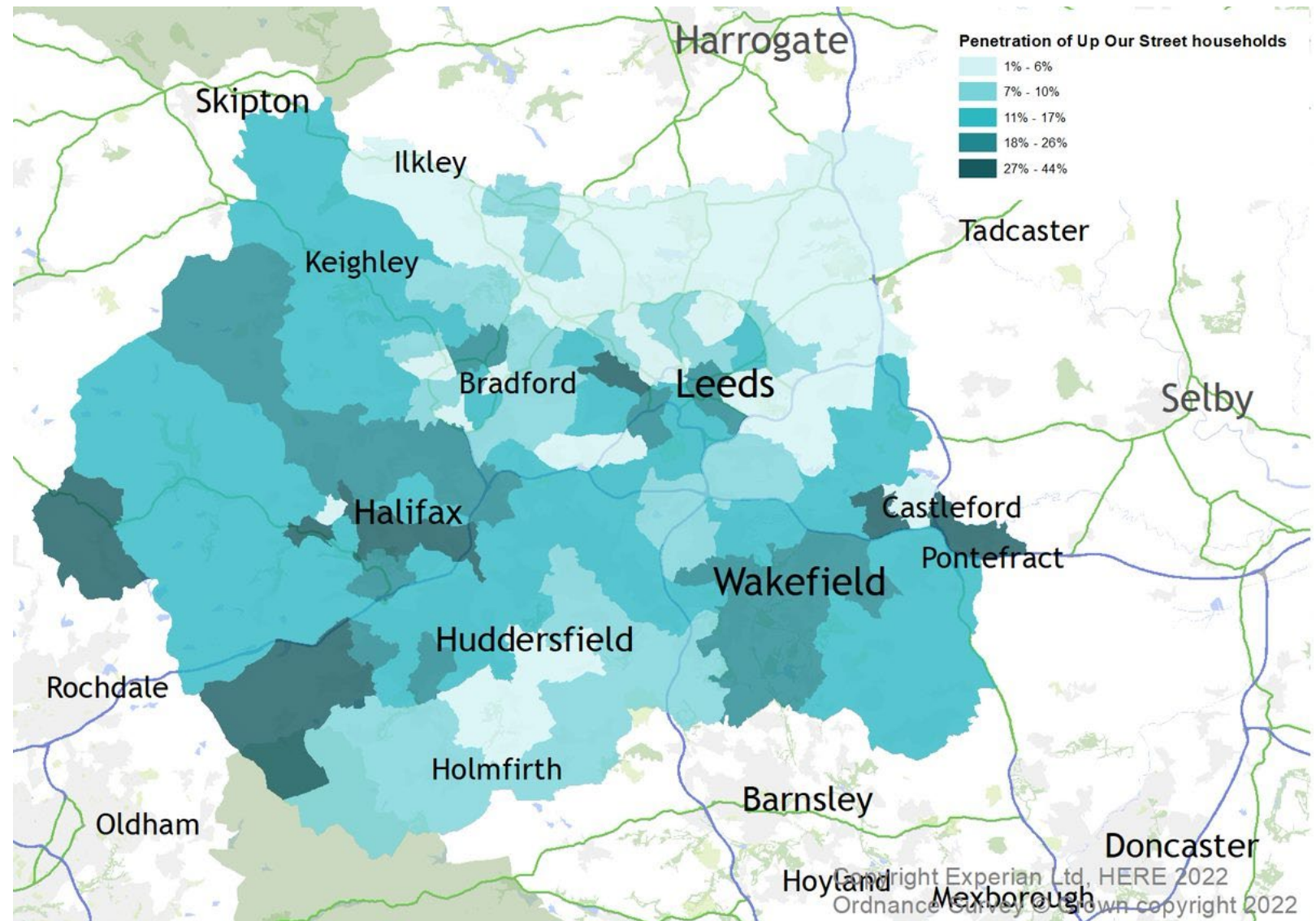
Trips & Treats Population by Ward

Mainstream arts and popular culture fans influenced by children, family and friends.



Up Our Street Population by Ward

Sociable retirees looking for
inexpensive, mainstream,
local leisure opportunities.



Local Audiences

Sales and Profile

About Local Audiences

Audience Finder ticketing:

	16-17	19-20	Increase
Bookers	165k	177k	12k
Bookings	343k	375k	33k
Tickets	919k	987k	69k
Income	£23.2M	£24.8M	£1.7M

Local Venues Included:

Bradford Theatres

Leeds Heritage Theatres

Leeds Playhouse

The Victoria Theatre

Theatre Royal Wakefield

Lawrence Batley Theatre

Halifax Culture Hub

Opera North

Ilkley Literature Festival

Castleford Phoenix Theatre

Northern Ballet

Kirklees Libraries

Yorkshire Dance

Northern School of Contemporary Dance

Theatre in the Mill

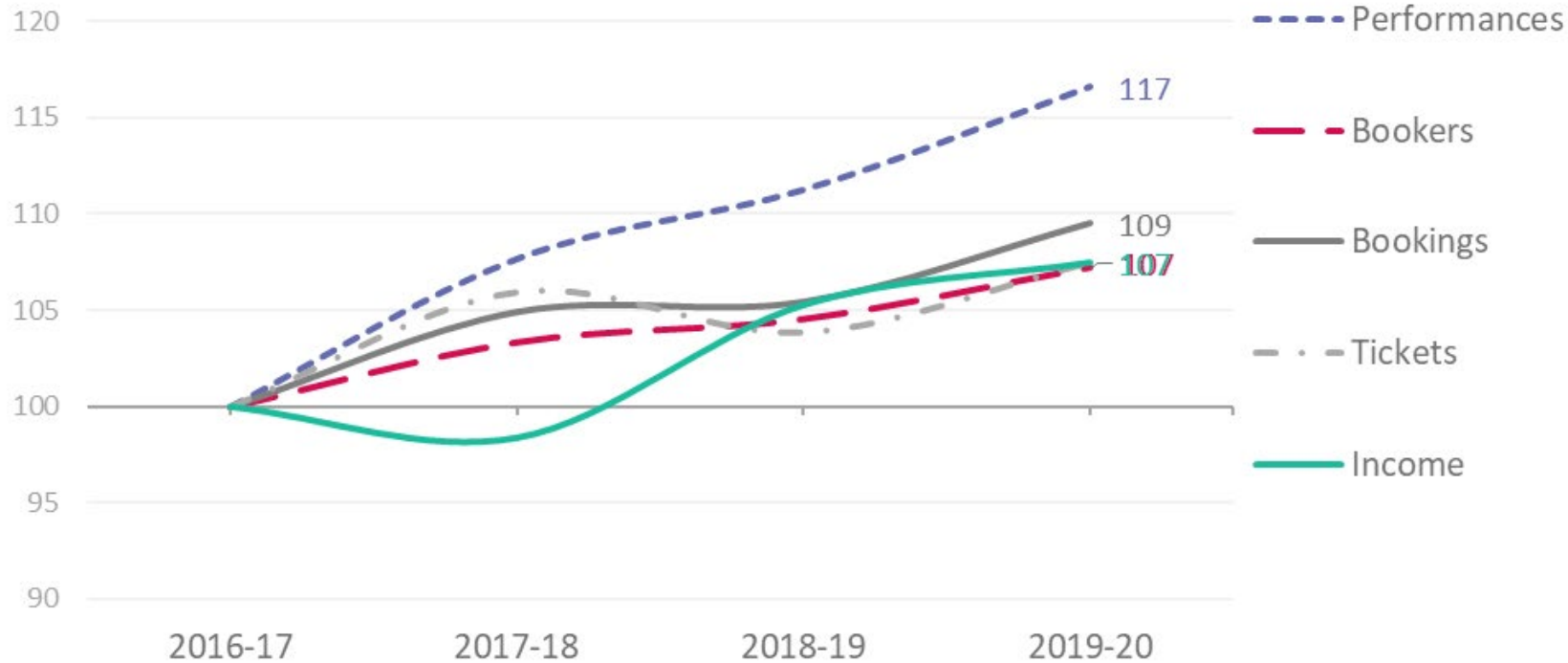
Mind The Gap

Henry Moore Foundation

+19 other Yorkshire venues

Sales Trends

Sales trend - index



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

2019/20:

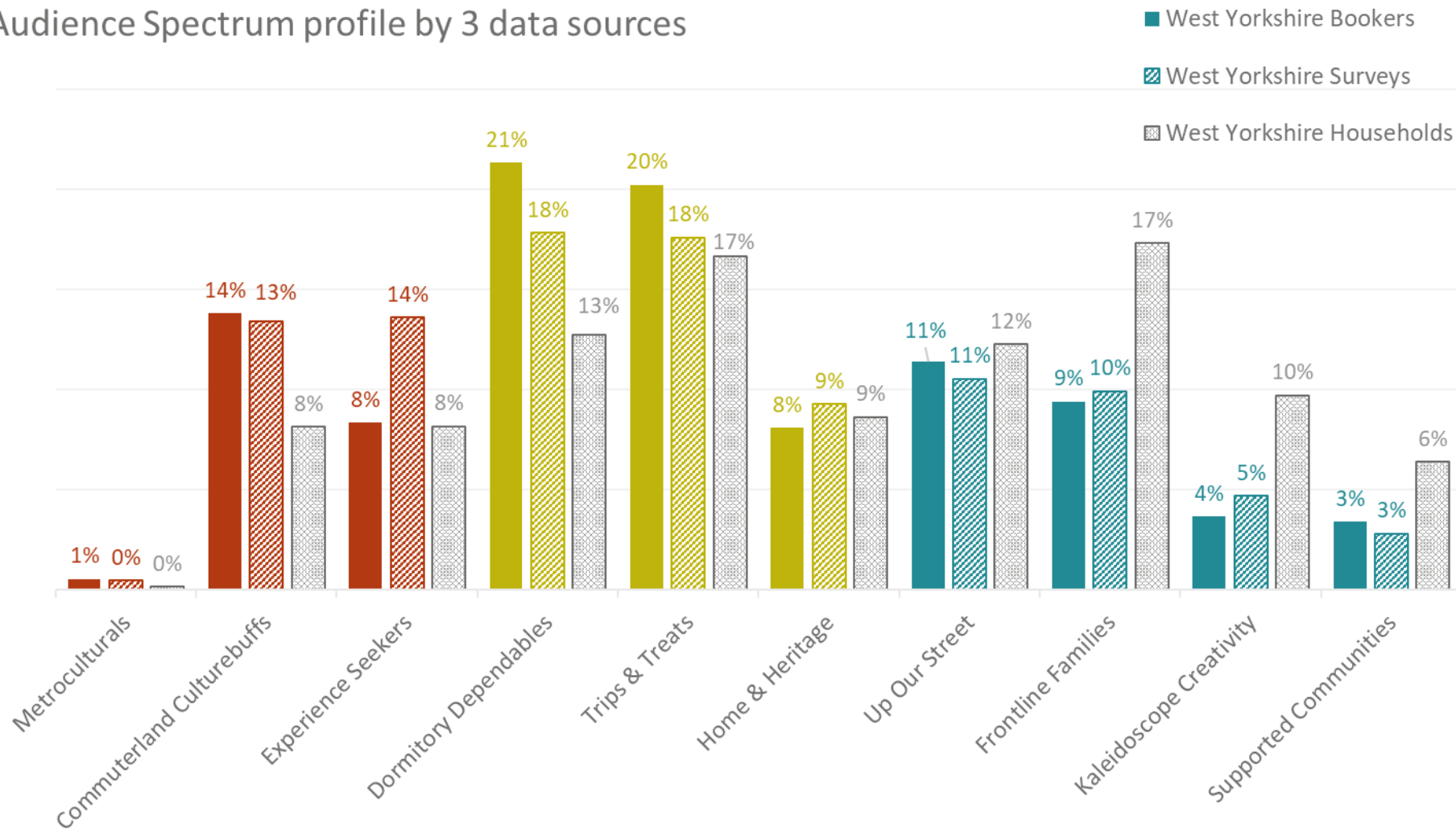
Avg. income/ticket: £25.73, +0%

Avg. bookings/booker: 2.1, +4%

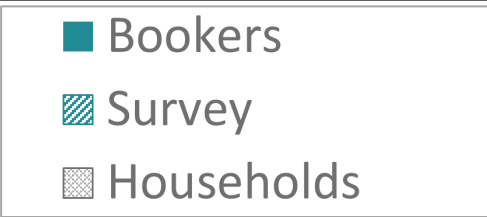
Avg. tickets/booking: 2.3, -1.9%

About Local Audiences

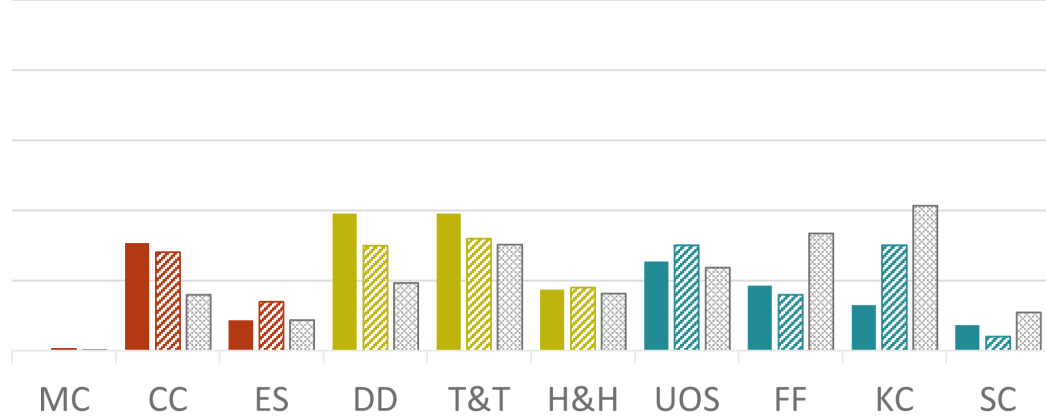
Audience Spectrum profile by 3 data sources



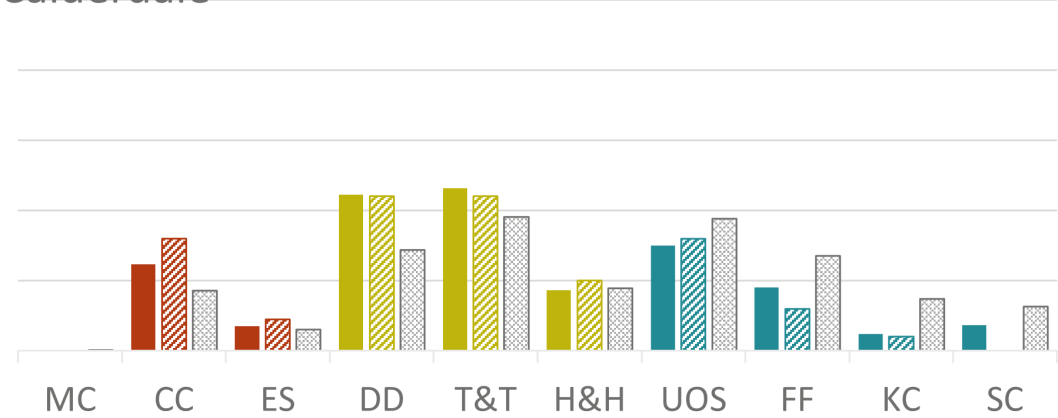
About Local Audiences



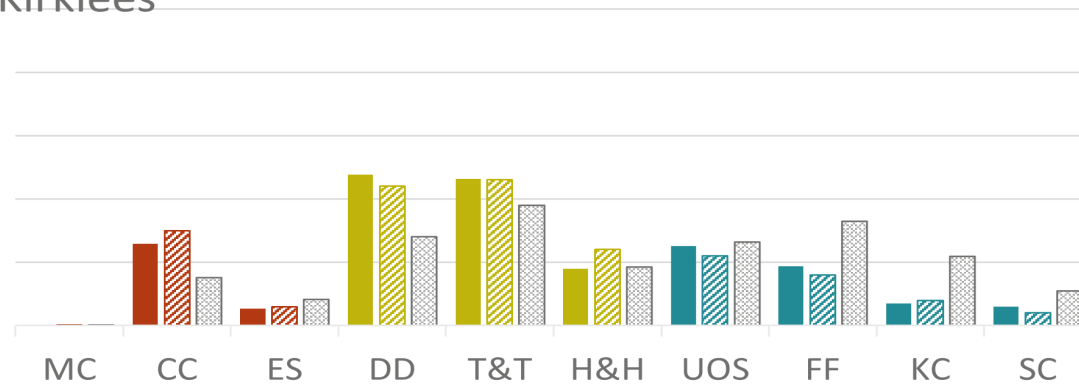
Bradford



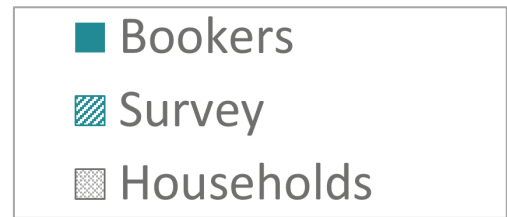
Calderdale



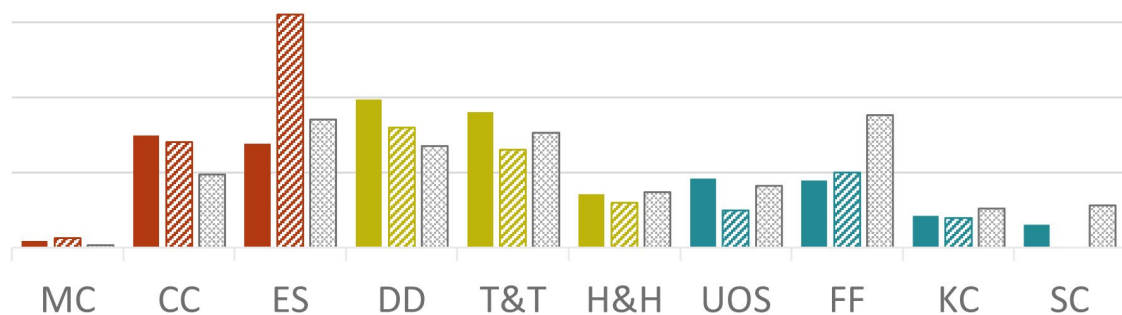
Kirklees



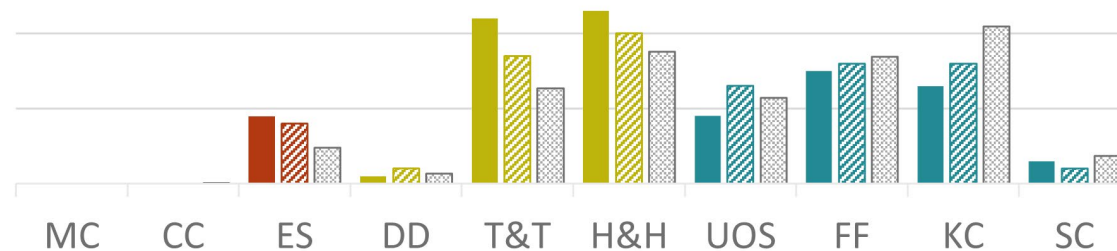
About Local Audiences



Leeds



Wakefield



Audience Trends

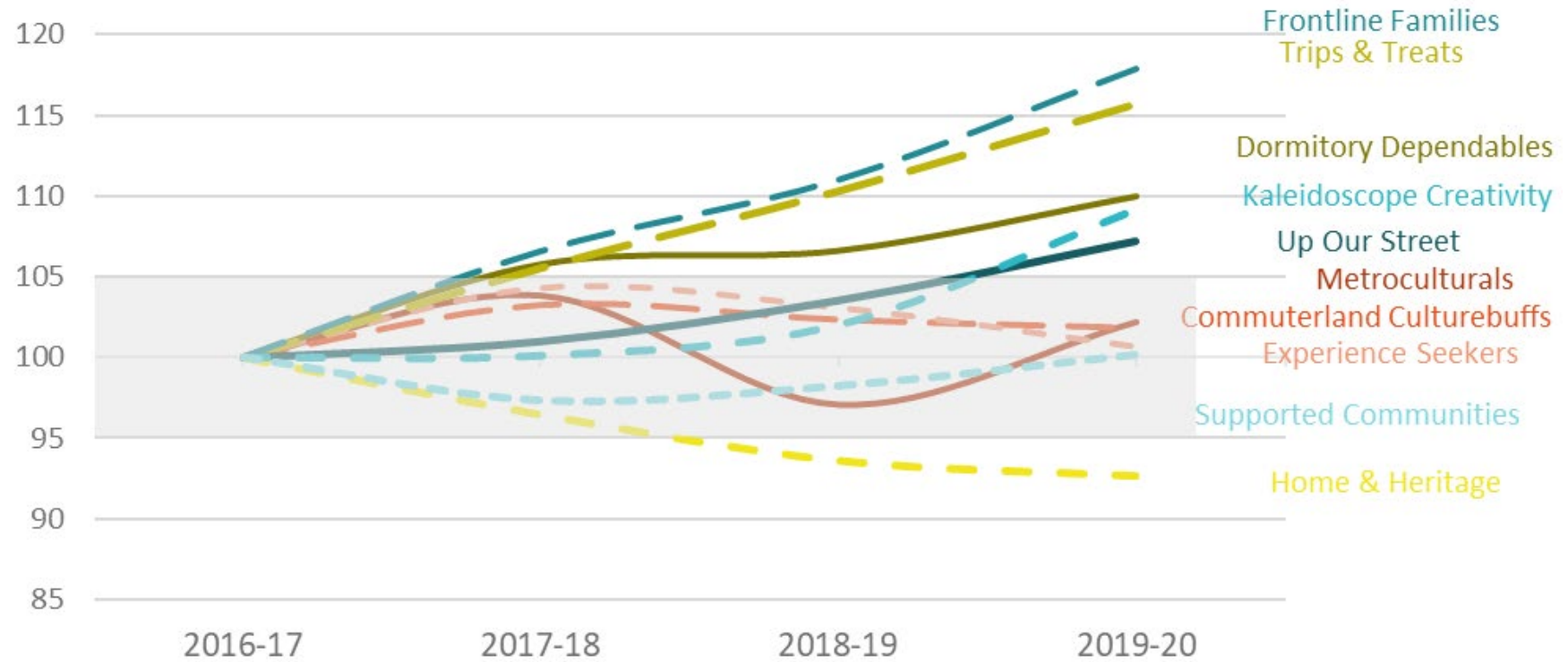
(Lower/Middle Income) Families



Older / Higher-engaged



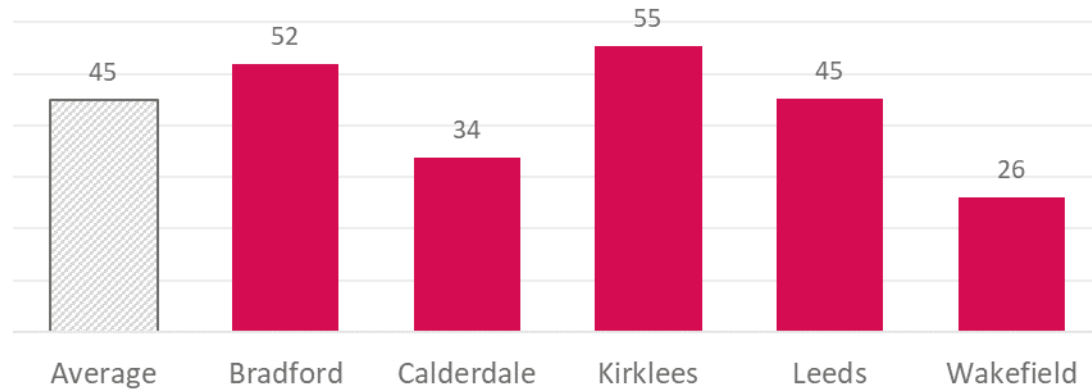
Audience trend - index



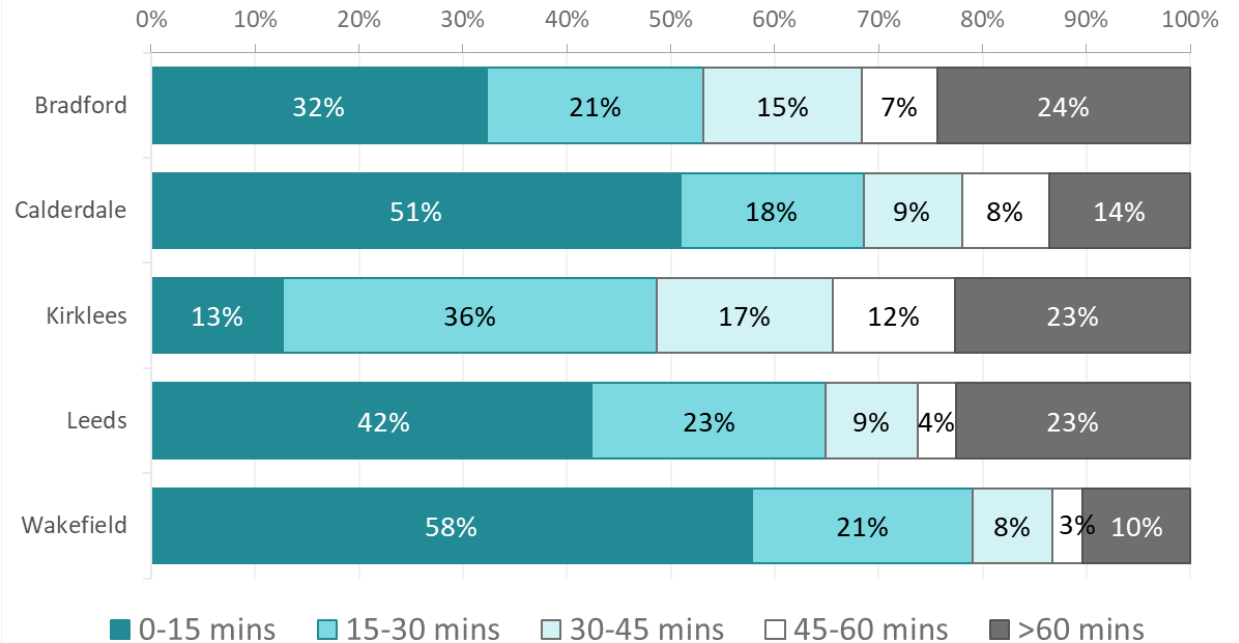
Visiting Patterns

From surveys

Wakefield residents attended most locally, Kirklees the least
(distance in minutes drive)



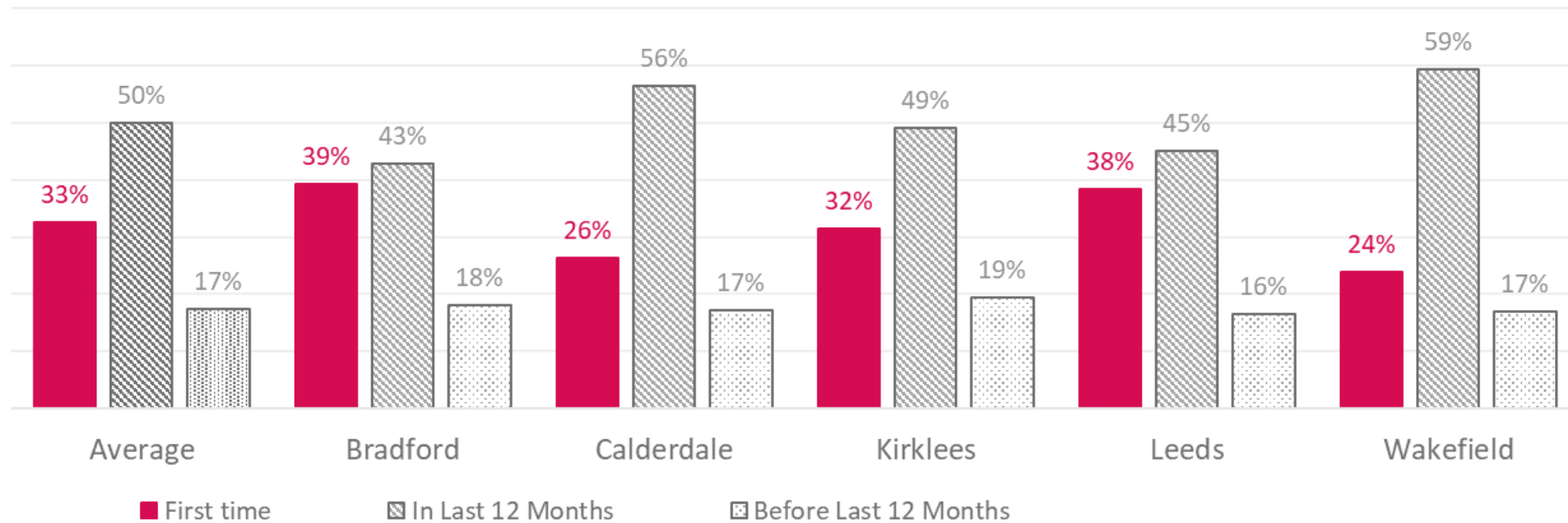
Drive time bands



Visiting Patterns

From surveys

Visitors from Wakefield were more likely to be recent visitors

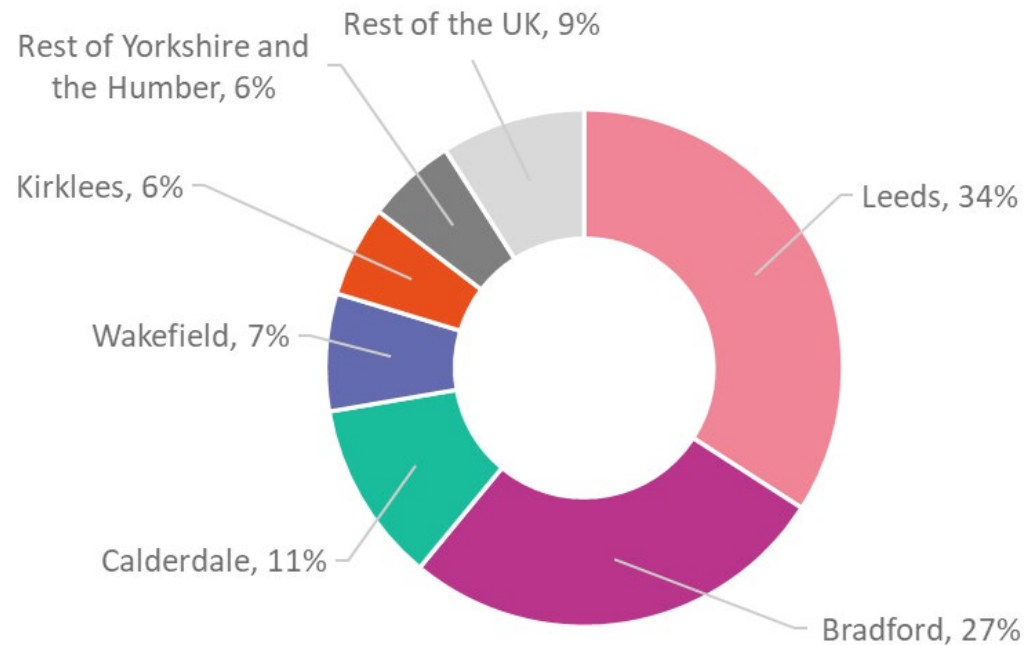


Local Audiences

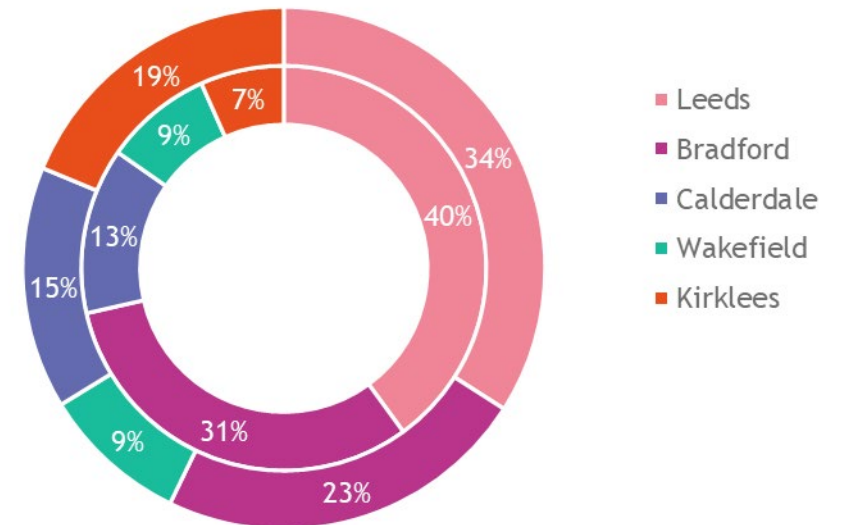
Geography

Non-Local Audiences

Where West Yorkshire Residents Book



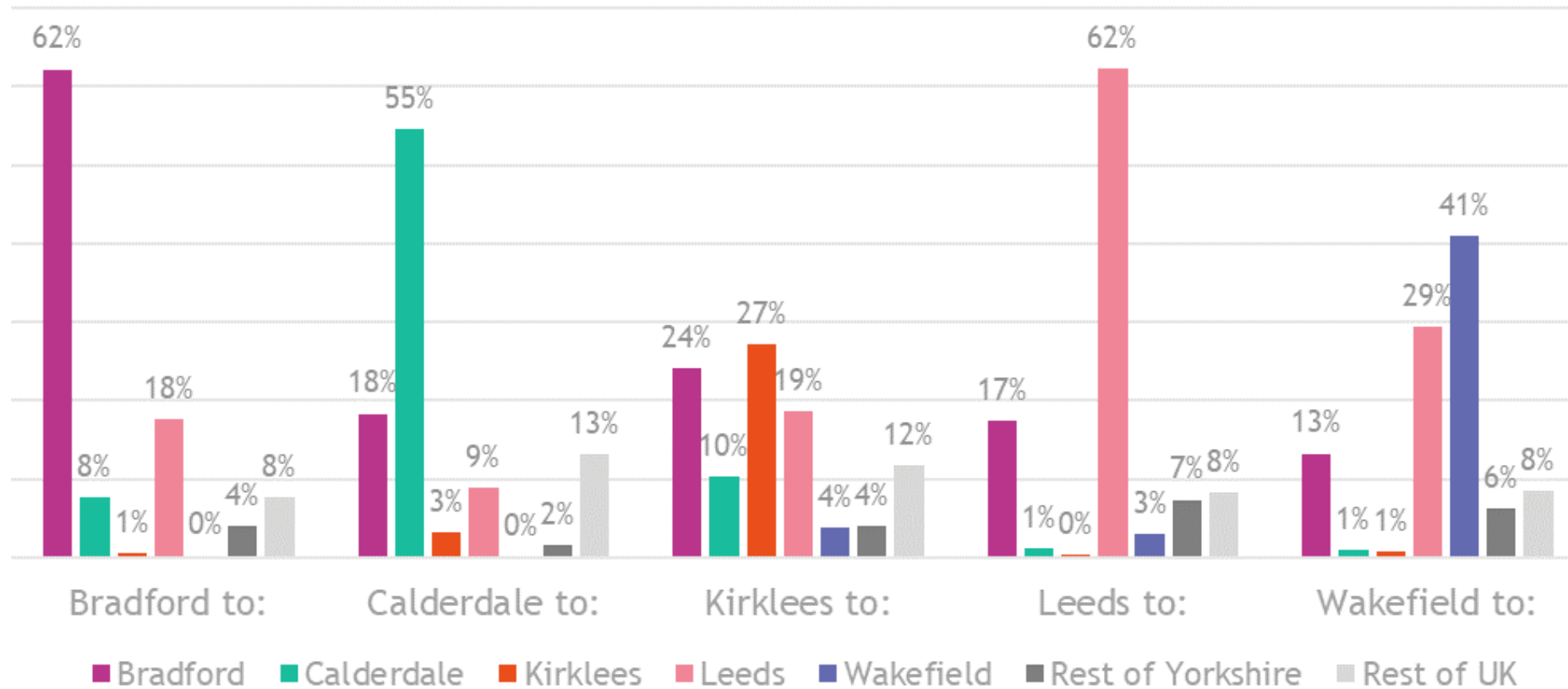
Leeds and Bradford are Over-Represented for Ticket Sales (inner) cf. Population (outer) (%s within West Yorkshire)



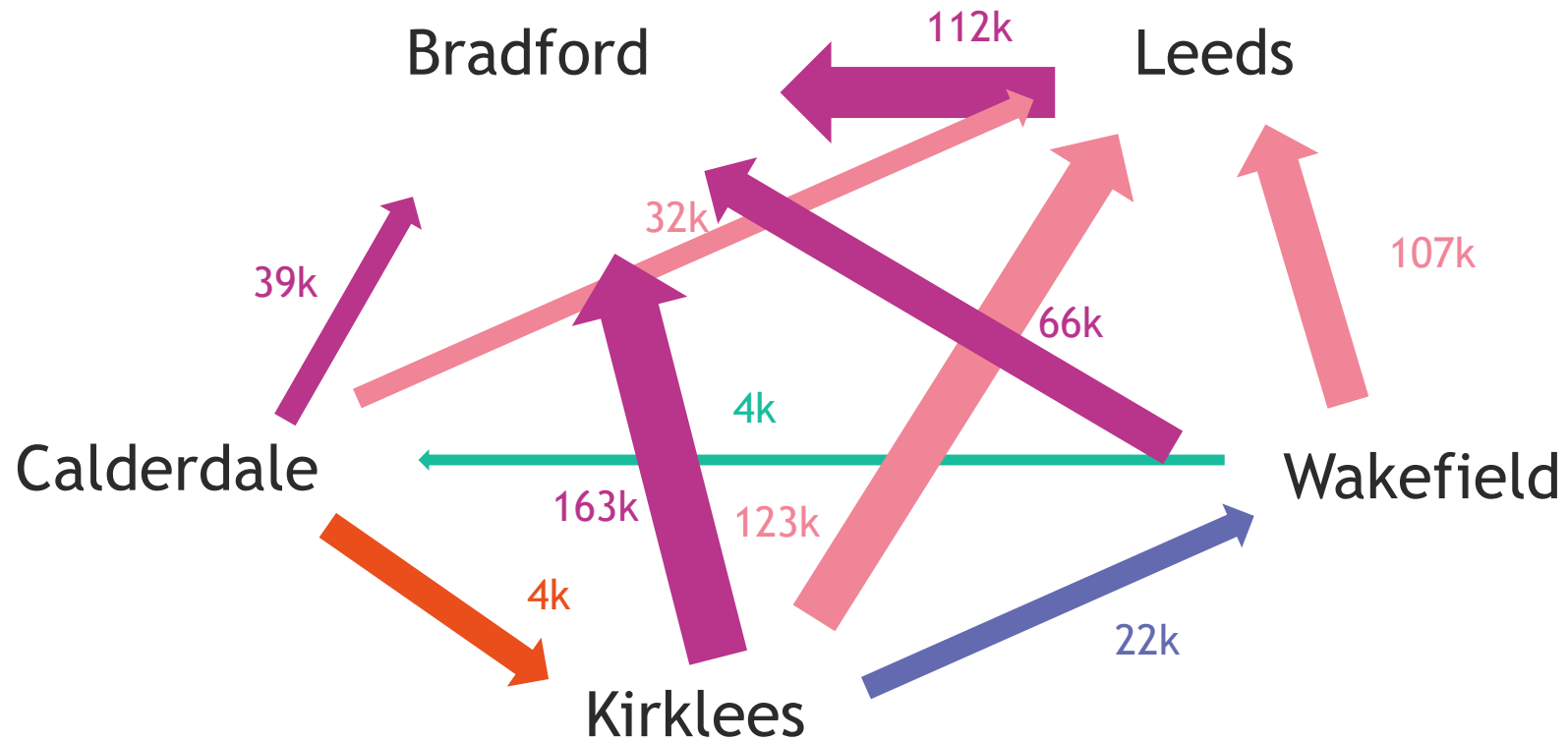
Audience Finder Surveys: 66% of survey respondents from the local area were visiting organisations locally

Local/Non-Local Audiences

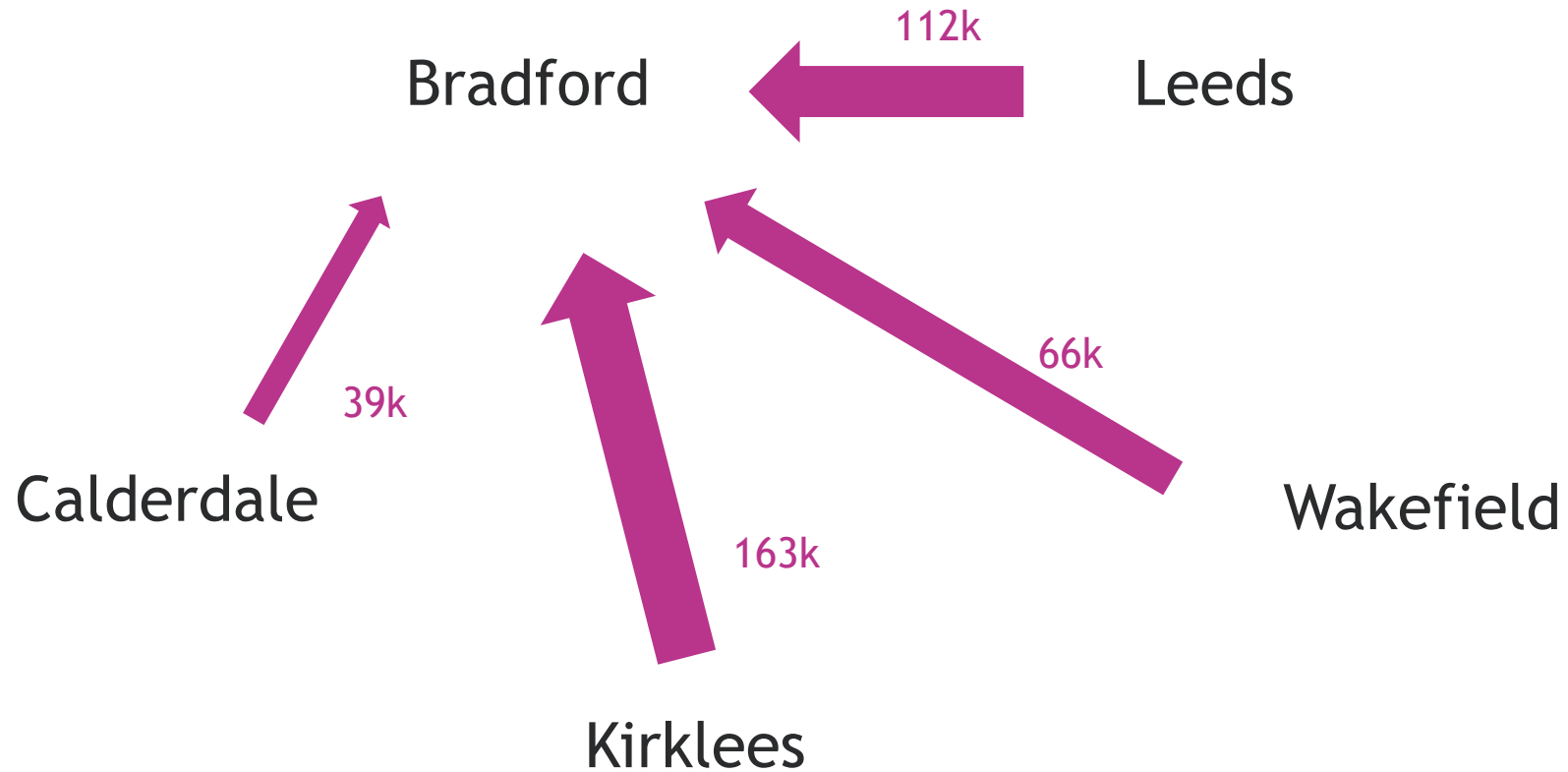
Where residents from each LA buy tickets



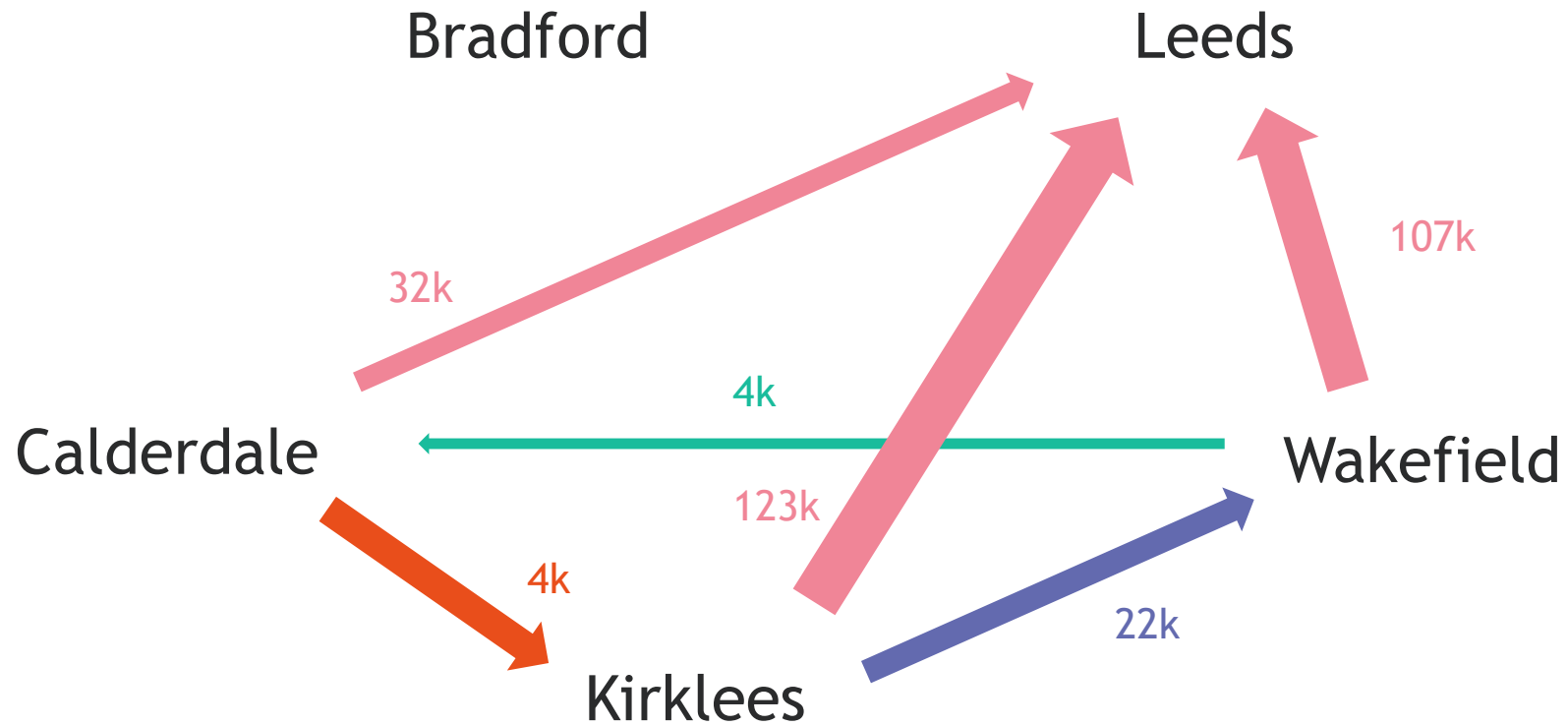
Net Audience Flows



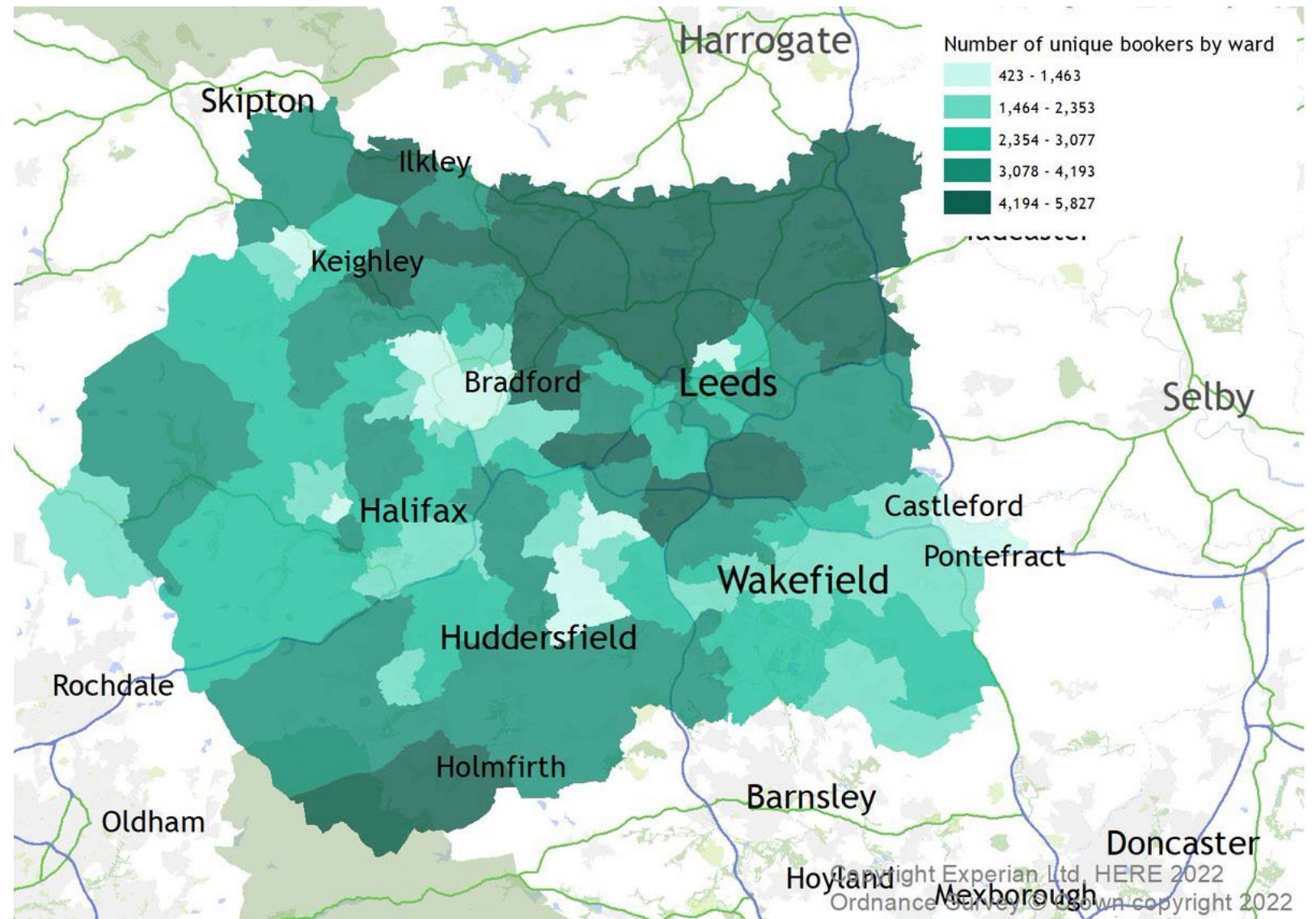
Net Audience Flows



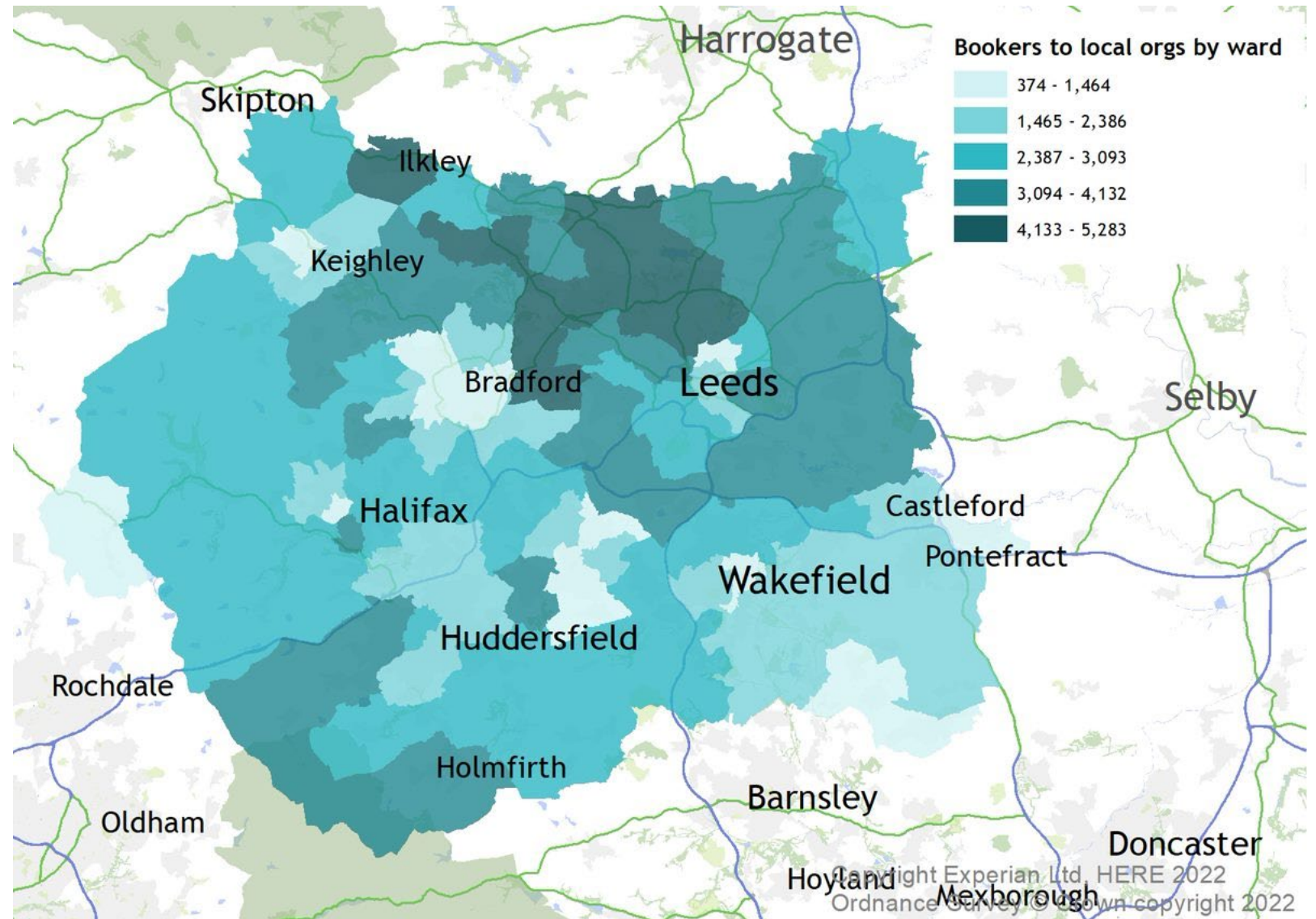
Net Audience Flows



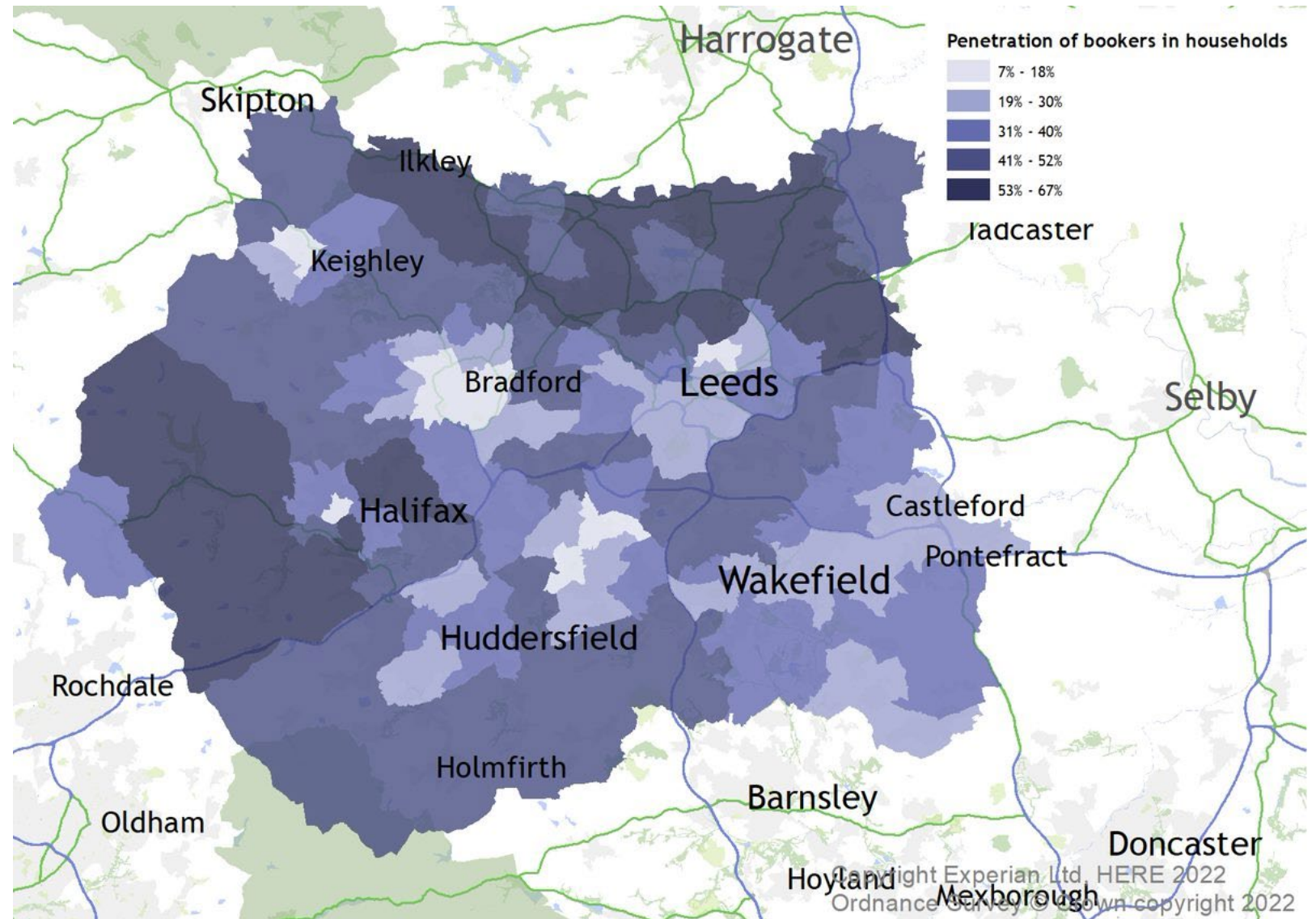
Audience Concentrations



Audience Concentrations – Local organisations



Audience Concentrations – Household Penetration



Attitudes re Attending

- **Frontline Families** are most likely to think it's time to get back to normal (55% cf. 49%) and more likely to think measures are too extreme (24% cf. 20%; ES 25%, KC 31%).
- **Trips & Treats** among those most likely to be happy to attend (43%, like ES; cf. 39%).
- Younger people are more likely to have been back, be happy to attend and expect to attend more in future, as are families, those who were previously highly engaged and those without disabilities.
- Yorkshire overall in line with national averages.

Discussion

In Conclusion...?

- Leeds and Bradford very young - but in very different ways.
- Large and *varied* Asian/Asian British population by LA.
- Very local audience, both re profile and engagement patterns (both at a ward/sub-region level): need a localised strategy.
- Bradford and Leeds fairly reciprocal re audiences (but net towards Bradford); Kirklees very split; Wakefield very local (and more repeat attenders?), though many attend in Leeds.

From Discussion:

- Need to keep in mind areas like Leeds/Bradford have more ticketing data vs areas with more free events/venues, and this will impact the overall picture.
- Themes discussed about tickets included audience booking less further ahead (e.g. 1/2 weeks) and un-ticketed events doing very well even compared to free ticketed events.
- Digital is still an important part of the mix; some organisations are still hybrid and find those cautious about post Covid-19 returning are enthusiastic about digital engagement.

In Conclusion...?

From Evidence Presented:

- Sales growth pre-pandemic, but more growth of activity and income growth below inflation.
- Growth in particular of middle/low engaged family groups - post-COVID attitudes suggest further growth opportunities
- Net flows towards Bradford, then Leeds

From Discussion:

- There is good potential for more outdoor/large non-traditional indoor (e.g. shopping centre) events, with organisations like Leeds City Council supporting this already.
- There is real appetite for collaboration working between different organisations and the five West Yorkshire local authorities, with data supporting a significant flow of audience between them all.

In Conclusion...?

Trips & Treats:

- 15-20% in all local authorities, widespread in areas between major centres.
- Need clear, high-profile offer, suited to social /entertainment/family motivations (esp. the latter post-Covid?).

A couple of other groups are very concentrated:

Experience Seekers in Leeds and **Kaleidoscope Creativity** in Bradford

Up Our Street:

- 12% of population but particularly high in Calderdale and Wakefield.
- Mainly the older of the subsegments (U2).
- May prove difficult to attract post-COVID.

Frontline Families:

- 17% and very over-represented cf. England overall; highest in Wakefield.
- Mainly the younger and less established subtype (F2).
- More exposed re cost of living crisis/financial impact of Covid-19.

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
 - Theatre and Dance (23/6)
 - Audience Finder Onboarding (21/7)
 - Visual Arts (18/8)
- TEA Breaks (13/7 re Enhanced Audience Spectrum & monthly)

Thank you

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

 the audience agency