

West Central Scotland

Place Based Insights

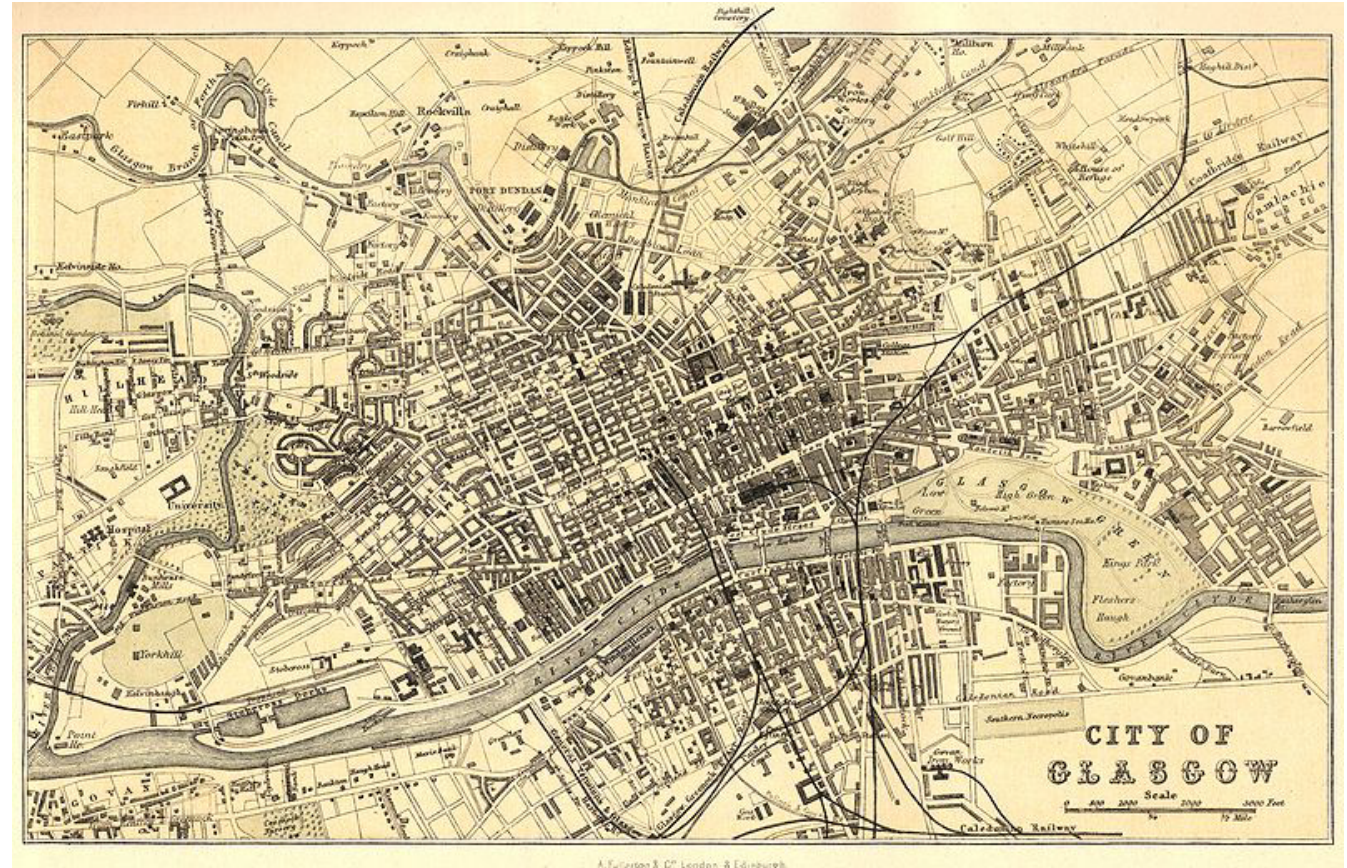
Oliver Mantell, Director of Evidence & Insight

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Format of the session

- About the local area and population
- About local audiences
- Discussion re findings and your 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

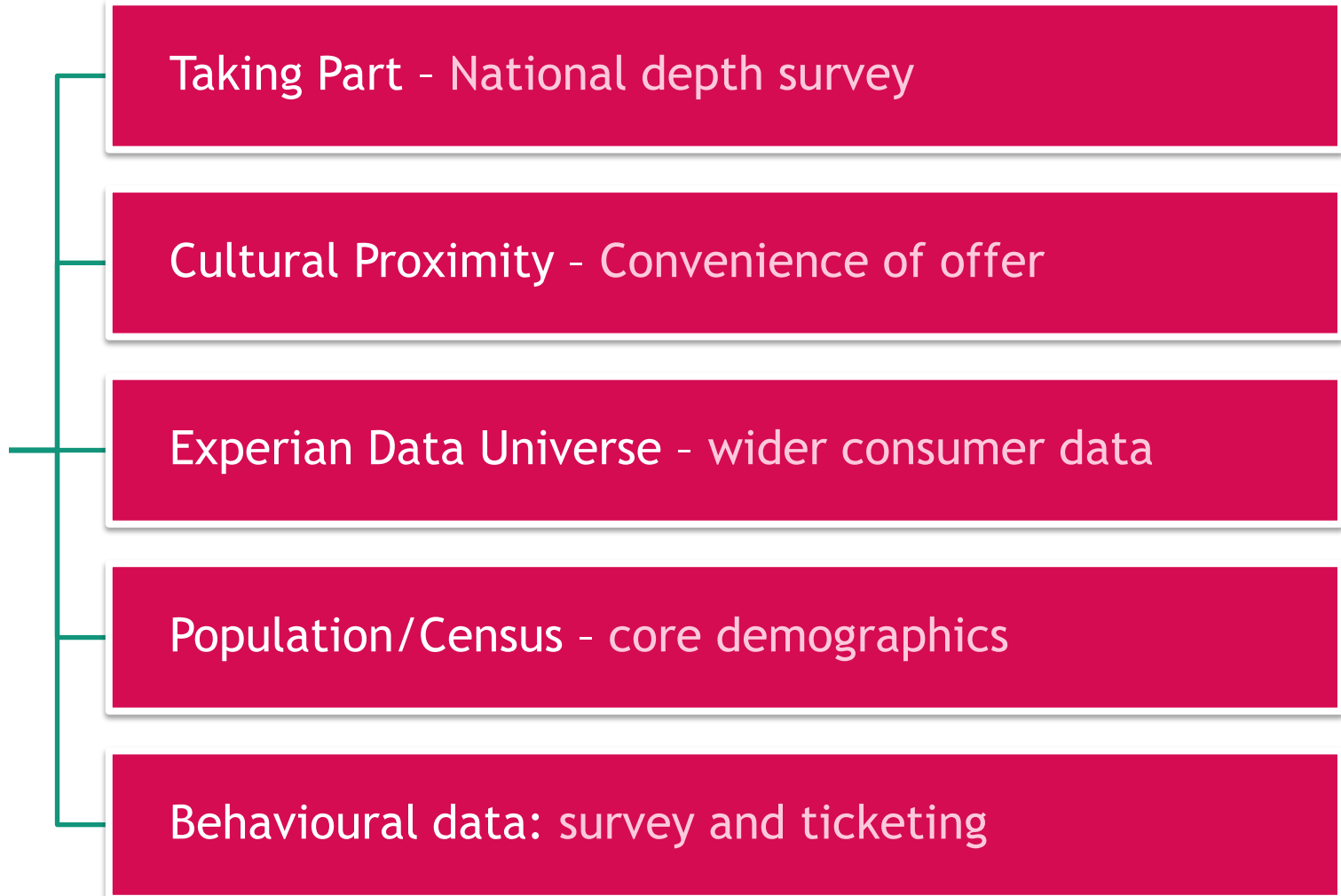
- Audience Spectrum / Audience Finder (ticketing) / APR+

 audience
spectrum

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

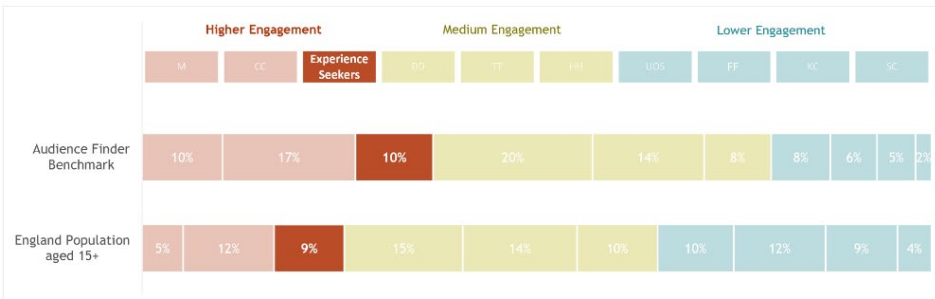
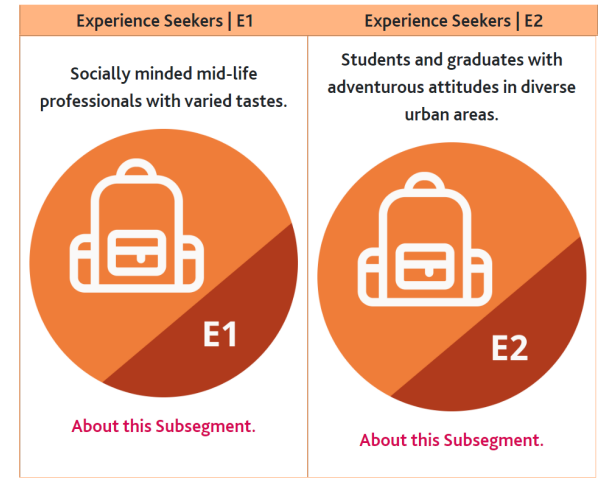


Key Data Sources



Experience Seekers

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



Core Characteristics:

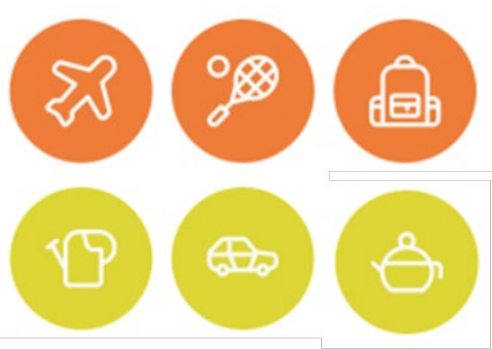
- **Profiles:** A younger-leaning, lively and active cohort of busy, mixed prosperity professionals, from a wide range of backgrounds and at a variety of different life stages. [More information.](#)
- **Attitudes:** Considering culture to be at the heart of their social life motivates seeking out frequent 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


Enhanced Audience Spectrum:




Metroculturals | M1
Older, established and high-spending professional elites.




Metroculturals | M2
Younger, mobile and emerging metropolitan professionals.



Commuterland Culturebuffs | C1
Prosperous families, living in the commuterbelt of major urban centres.



Commuterland Culturebuffs | C2
Wealthy empty-nesters with comfortable lifestyles in more rural areas.



Experience Seekers | E1
Socially minded mid-life professionals with varied artistic tastes.



Experience Seekers | E2
Students and graduates with adventurous attitudes in diverse urban areas.




Up Our Street | U1
Middle-aged inhabitants of semis on the edge of town.




Up Our Street | U2
Older residents of terraces and flats in built up areas.



Frontline Families | F1
Older families, getting by despite challenges.



Frontline Families | F2
Younger, cash-strapped families and couples starting out.




Dormitory Dependables | D1
Commuter-town families, investing for the future.




Dormitory Dependables | D2
Settled, comfortable residents, enjoying regional life.




Trips & Treats | T1
Modern young families, building a future.




Trips & Treats | T2
Settled families with established lifestyles.



Home & Heritage | H1
Settled suburban seniors.



Home & Heritage | H2
Affluent residents of rural idylls.



Kaleidoscope Creativity | K1
Settled and diverse urban communities.



Kaleidoscope Creativity | K2
Hard-pressed singles in city tower blocks.



Supported Communities | S1
Young, immobile and hard-up, often relying on welfare to get by.



Supported Communities | S2
Elderly residents of sheltered housing, with low incomes and declining health.



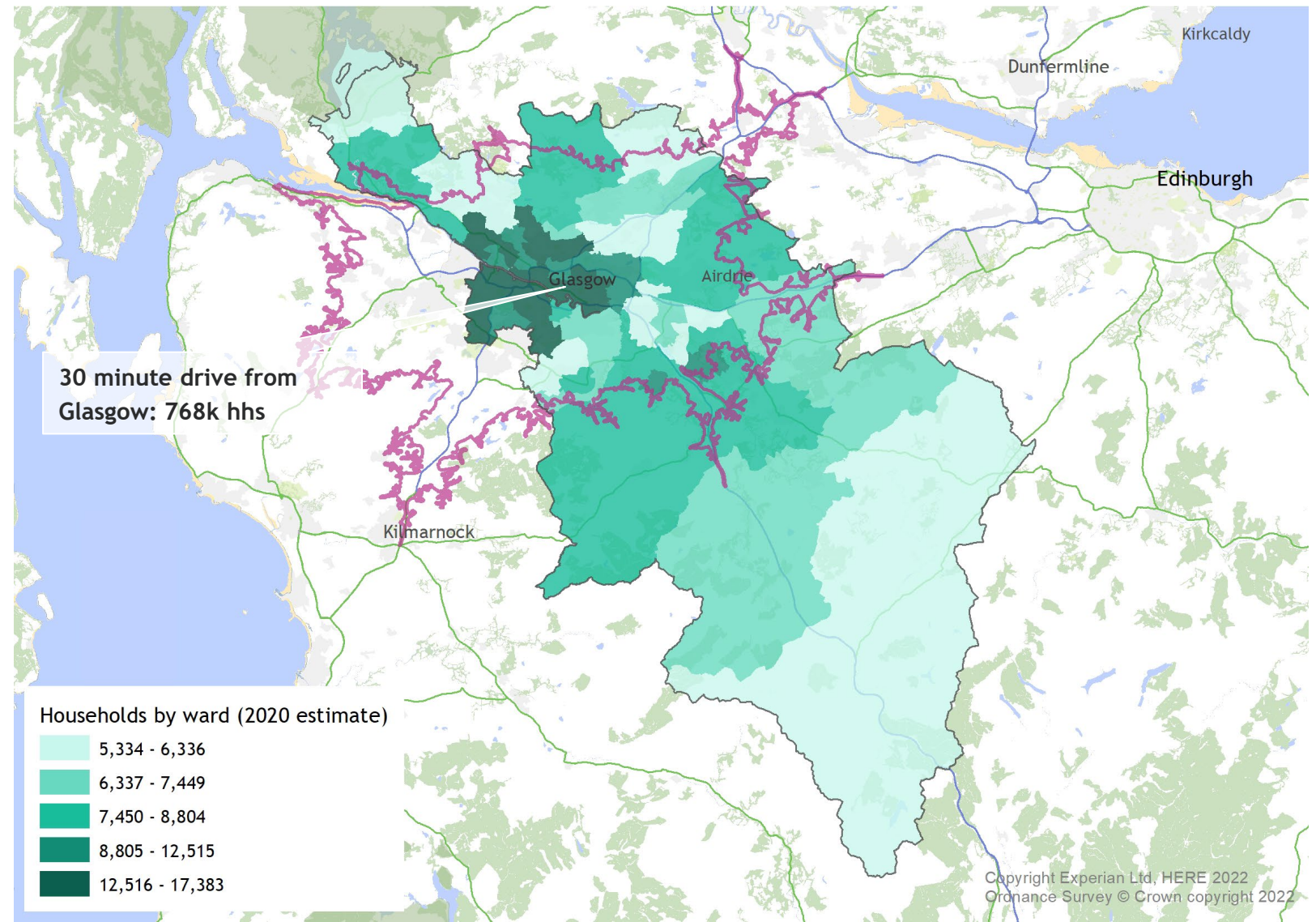
Who is the Local Population?

Local Area and Population

- Overview of demographics, inc. hotspots, SIMD
- Audience Spectrum, inc. maps:
 - Profiles
 - Largest segment etc



Population density by ward

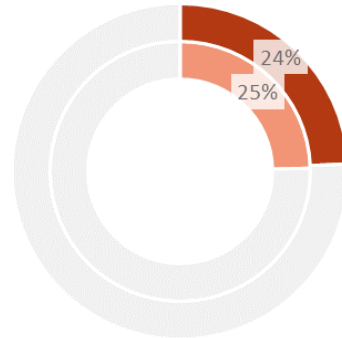


Population data – compared to rest of country

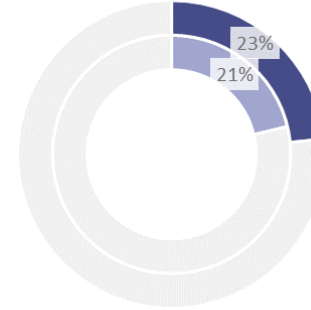
Outer ring: Scotland

Inner ring: West Central Scotland

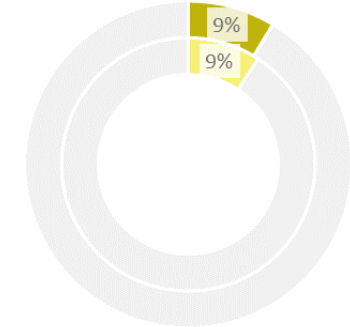
Families



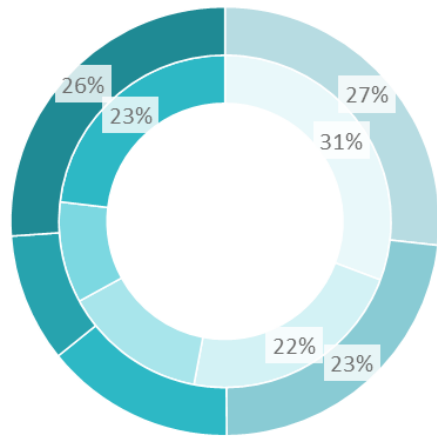
Retirees



Students

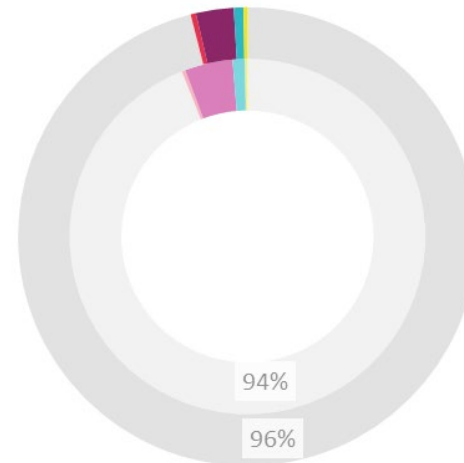


Education



- No qualifications
- GCSEs graded D-G, Foundation diploma
- GCSEs graded A*-C, Higher diploma
- AS and A Levels, Advanced and Progression diploma
- Higher Education and Higher diplomas

Ethnic groups



- White
- Mixed/multiple ethnic group
- Asian/Asian British
- Black/Black British
- Other

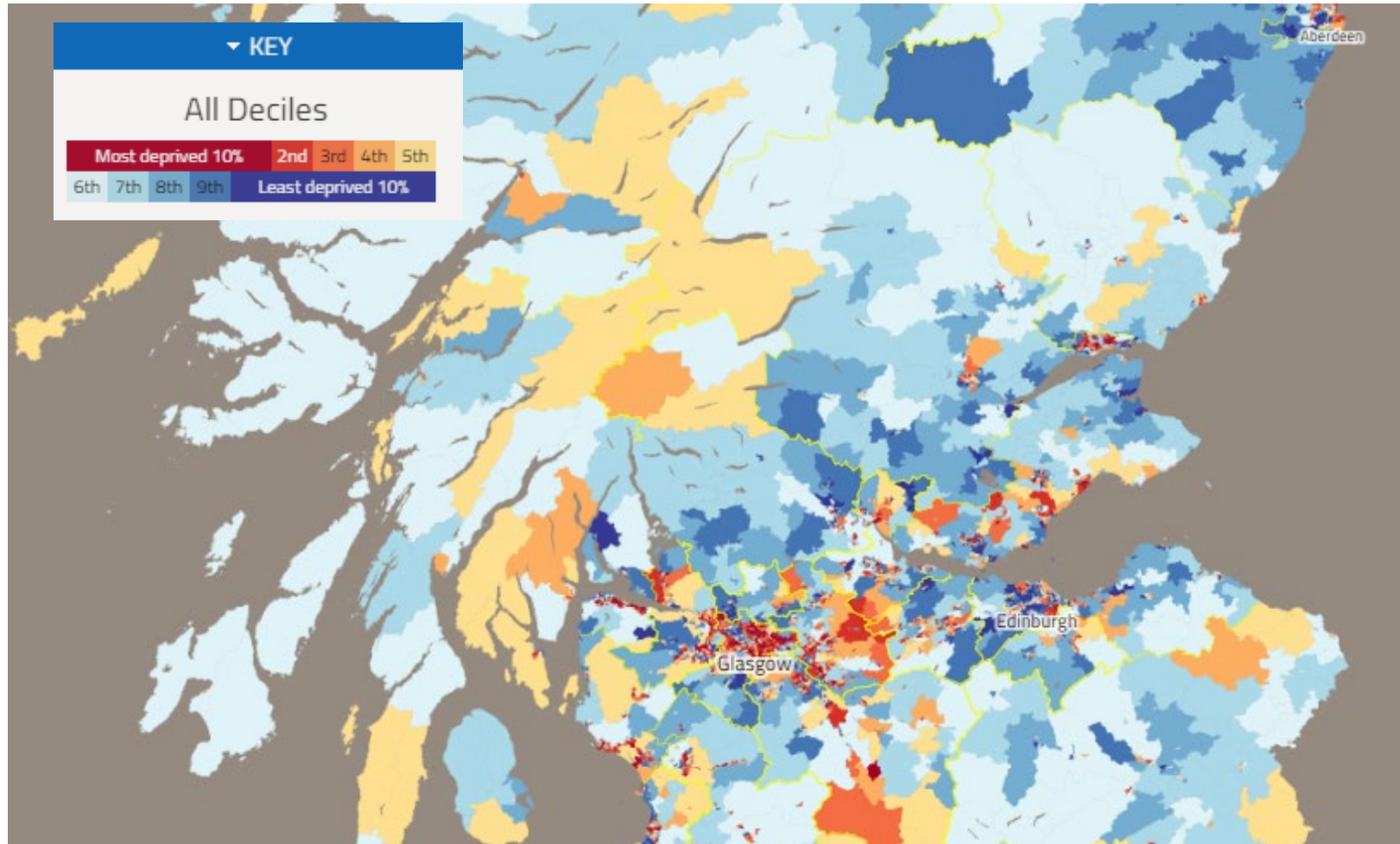
47% Pakistani (especially Southside Central)

22% Chinese (Hillhead, Partick)

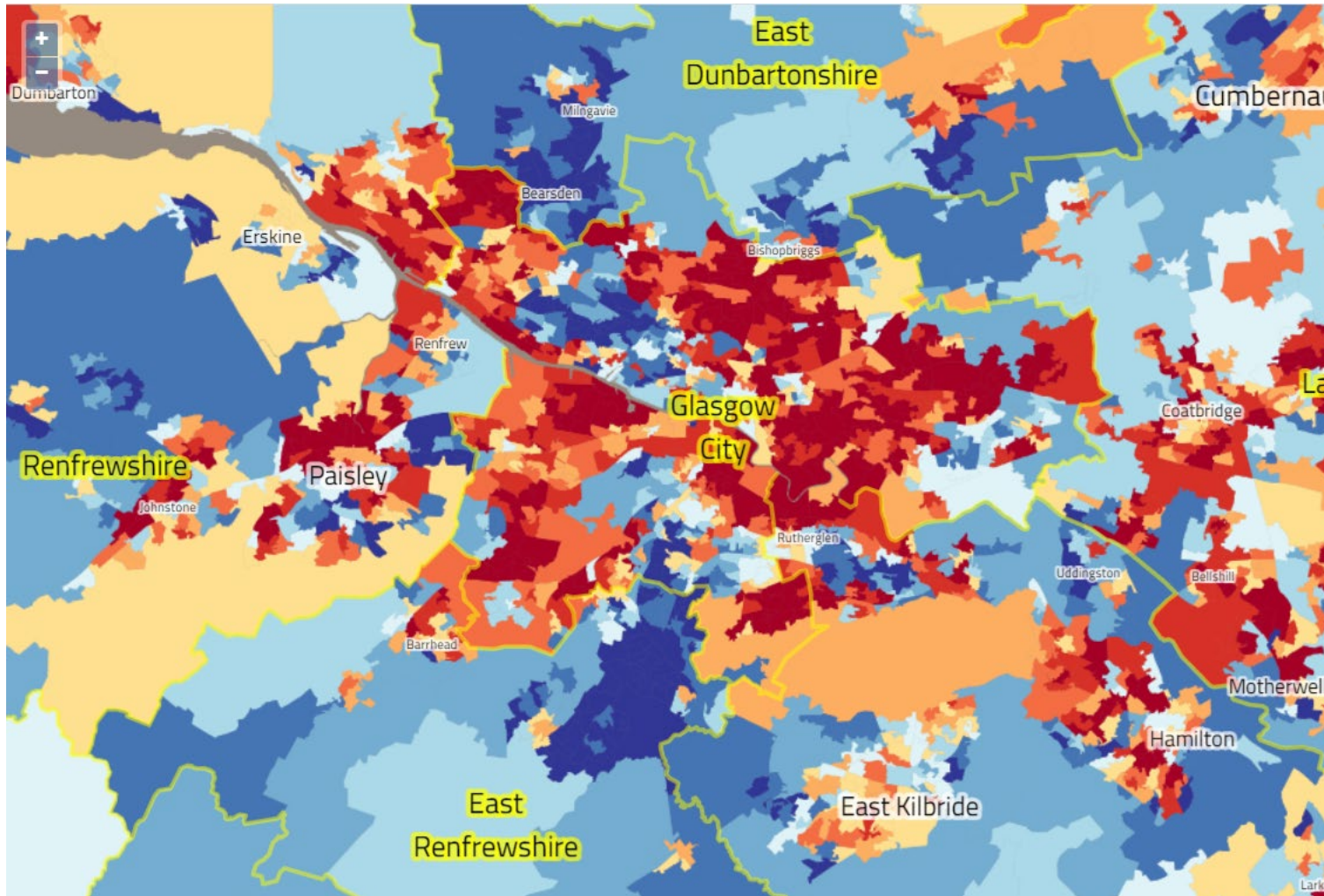
18% Indian (Govan, City)

Population data – Indices of Multiple Deprivation

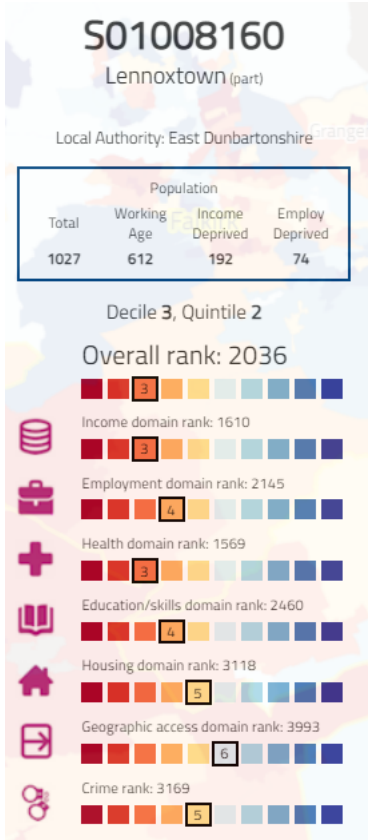
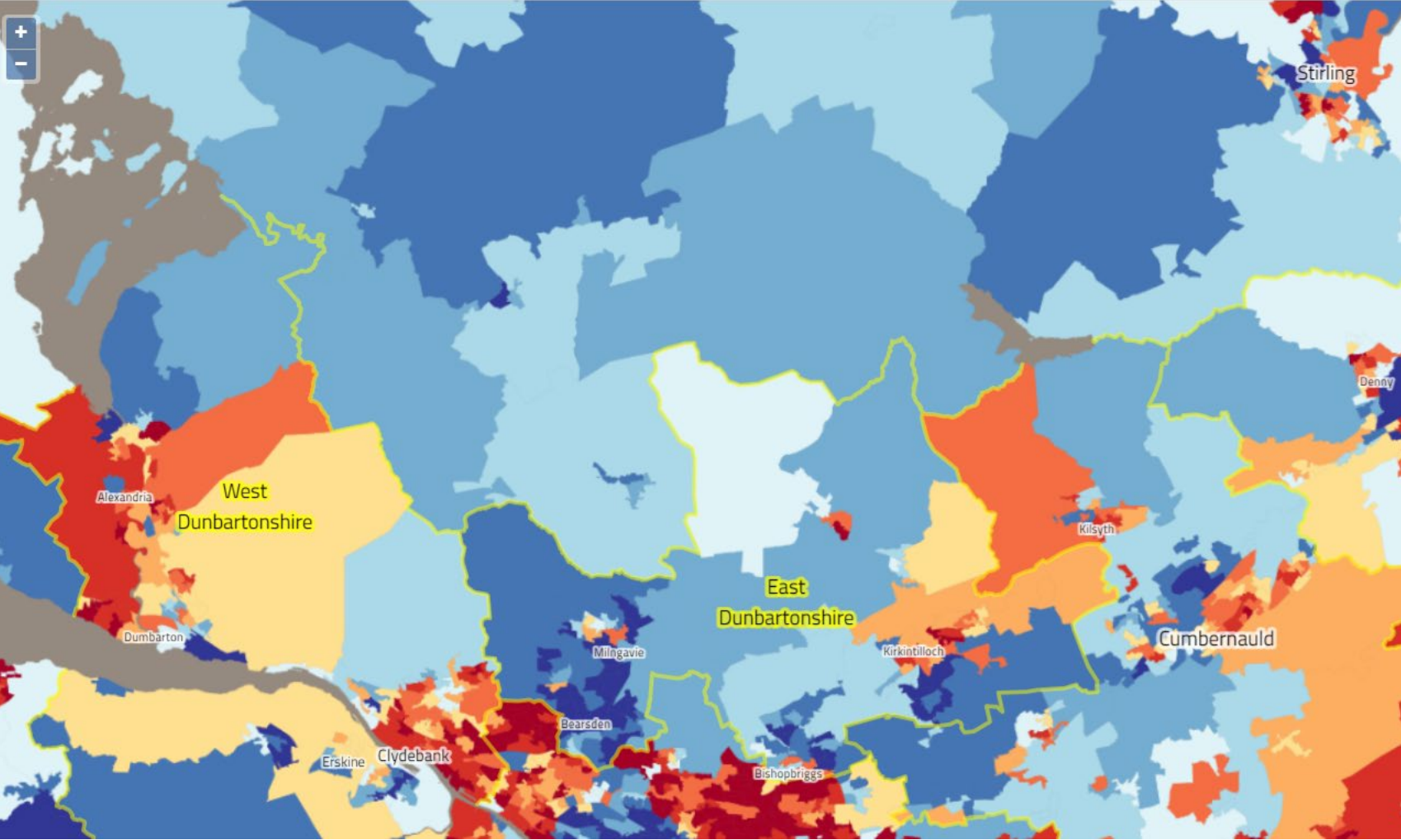
<https://simd.scot>



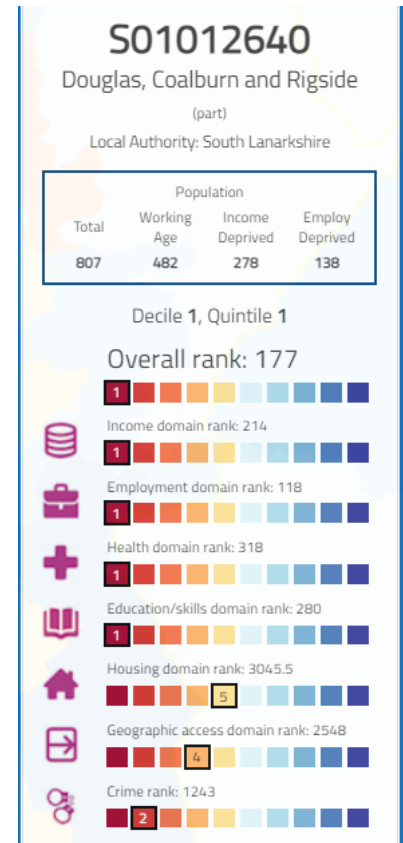
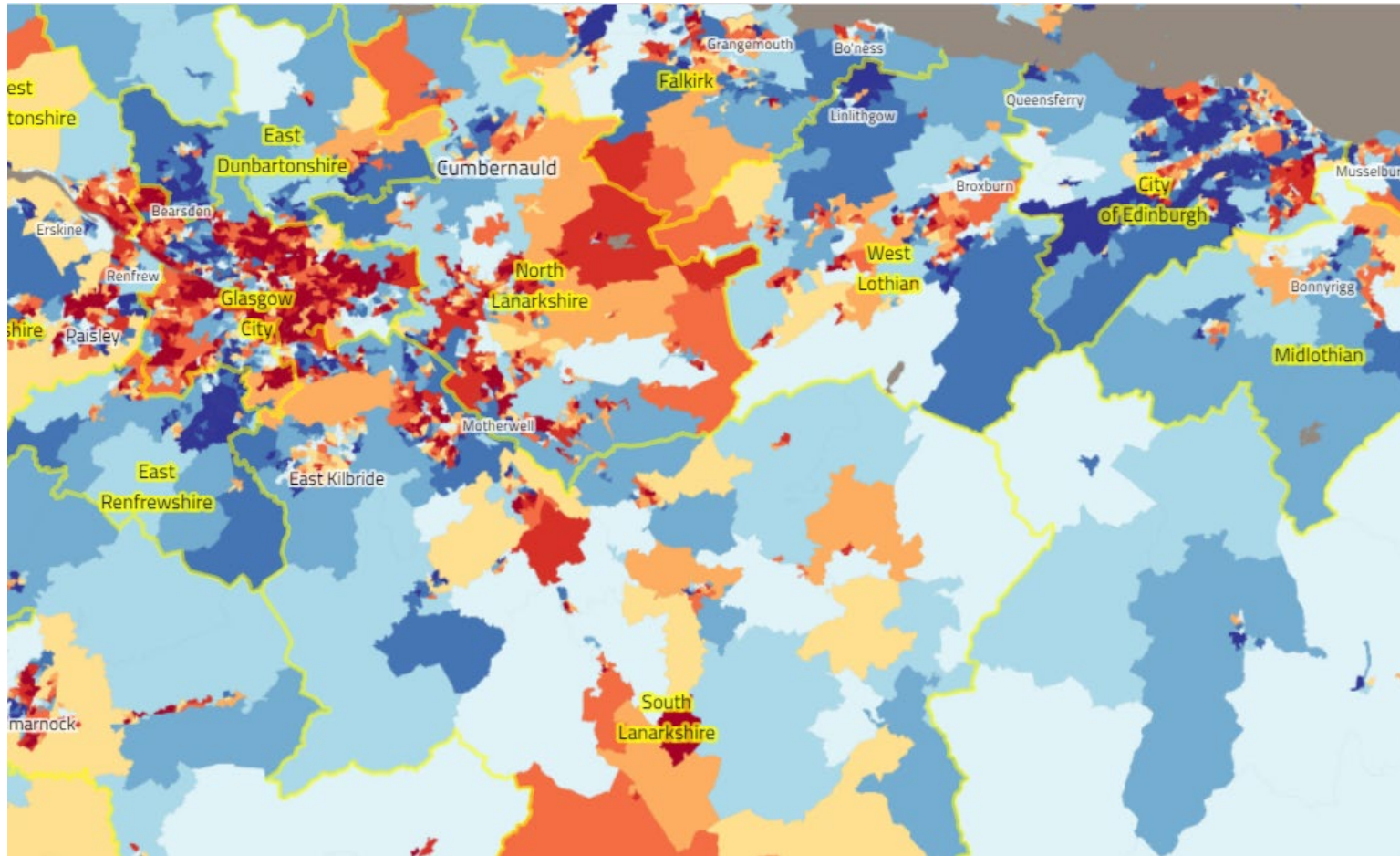
Population data – Indices of Multiple Deprivation



Population data – Indices of Multiple Deprivation

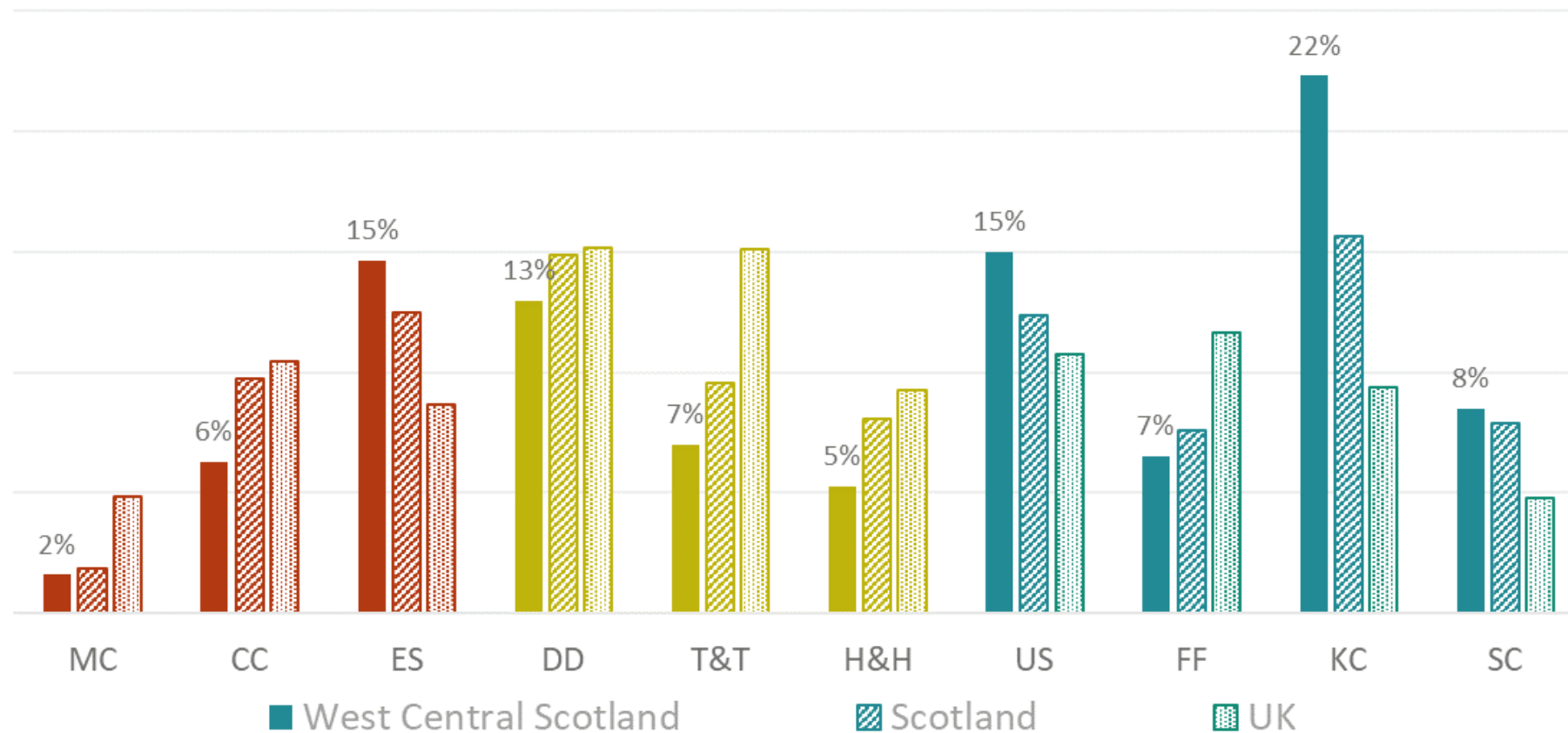


Population data – Indices of Multiple Deprivation



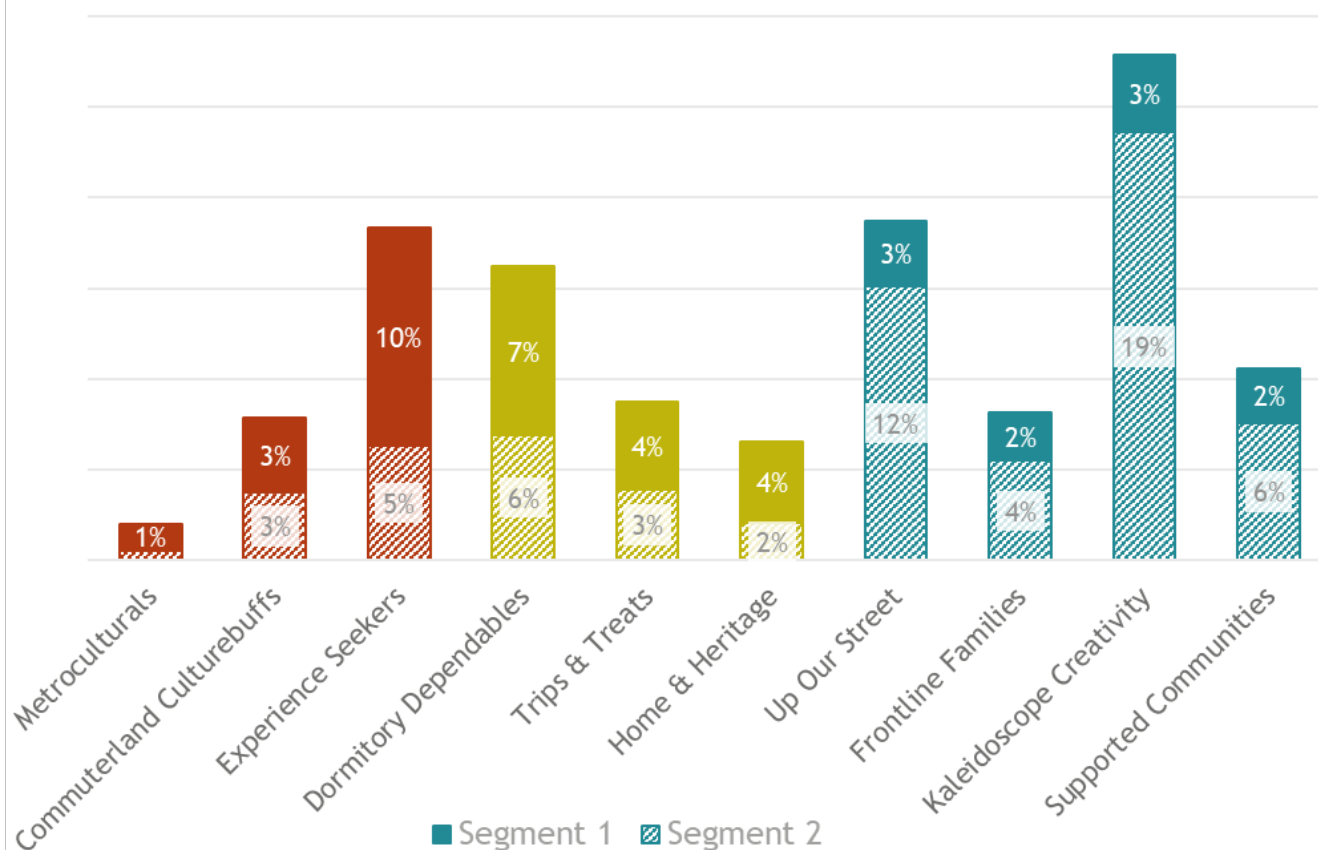
Overall Population Audience Spectrum Profile

Lower-engaged segments make up 52% of the population
Audience Spectrum profile for households (2020 estimate)



Overall Audience Spectrum Profile: Enhanced

West Central Scotland Enhanced Audience Spectrum Profile



Kaleidoscope Creativity | K2

Hard-pressed singles in city tower blocks.

Profiles and Places Lower income, often living alone in urban socially-owned flats.

Attitudes and Sectors K2s have low levels of engagement with publicly-funded arts and culture, but higher engagement digitally than K1s.

Digital and Comms Very high use of social media and messaging apps, except Facebook and Messenger. Very high use of subscription services too, inc. Netflix, Apple Music and TV, and Twitch, as well as high levels of gaming and use of VR/AR.

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

Population data – comparing the local areas

Glasgow City: High ES, KC, Black and Asian British, students. 5th highest LA for Me in the UK (excluding London and South of England). 7th highest for KC (excl. London).

North Lanarkshire: High KC, UoS, high for families.

South Lanarkshire: High DD, UoS, high for retirees.

East Dunbartonshire: High CC, DD, high for retirees but also those in higher paid professional occupations.

West Dunbartonshire: Very high KC, high UoS. 4th highest LA in the UK for KC (excl. London).

697k total:

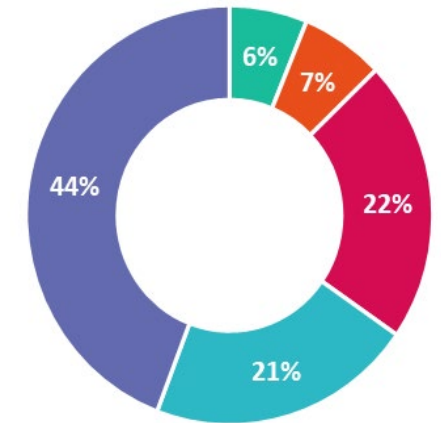
308k Glasgow City

152k North Lanarkshire

148k South Lanarkshire

46k East Dunbartonshire

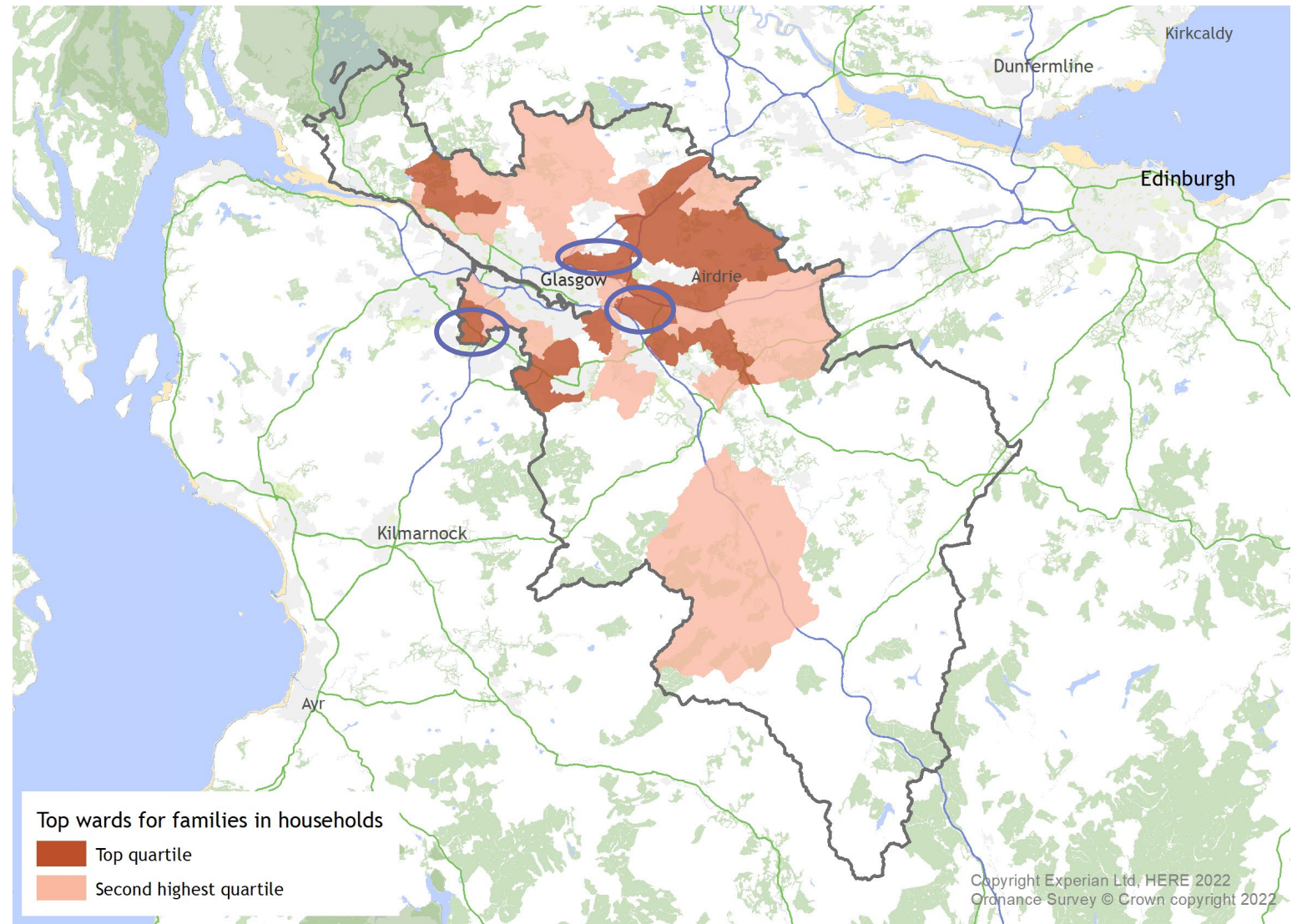
43k West Dunbartonshire



Where do family groups live?

Top wards:

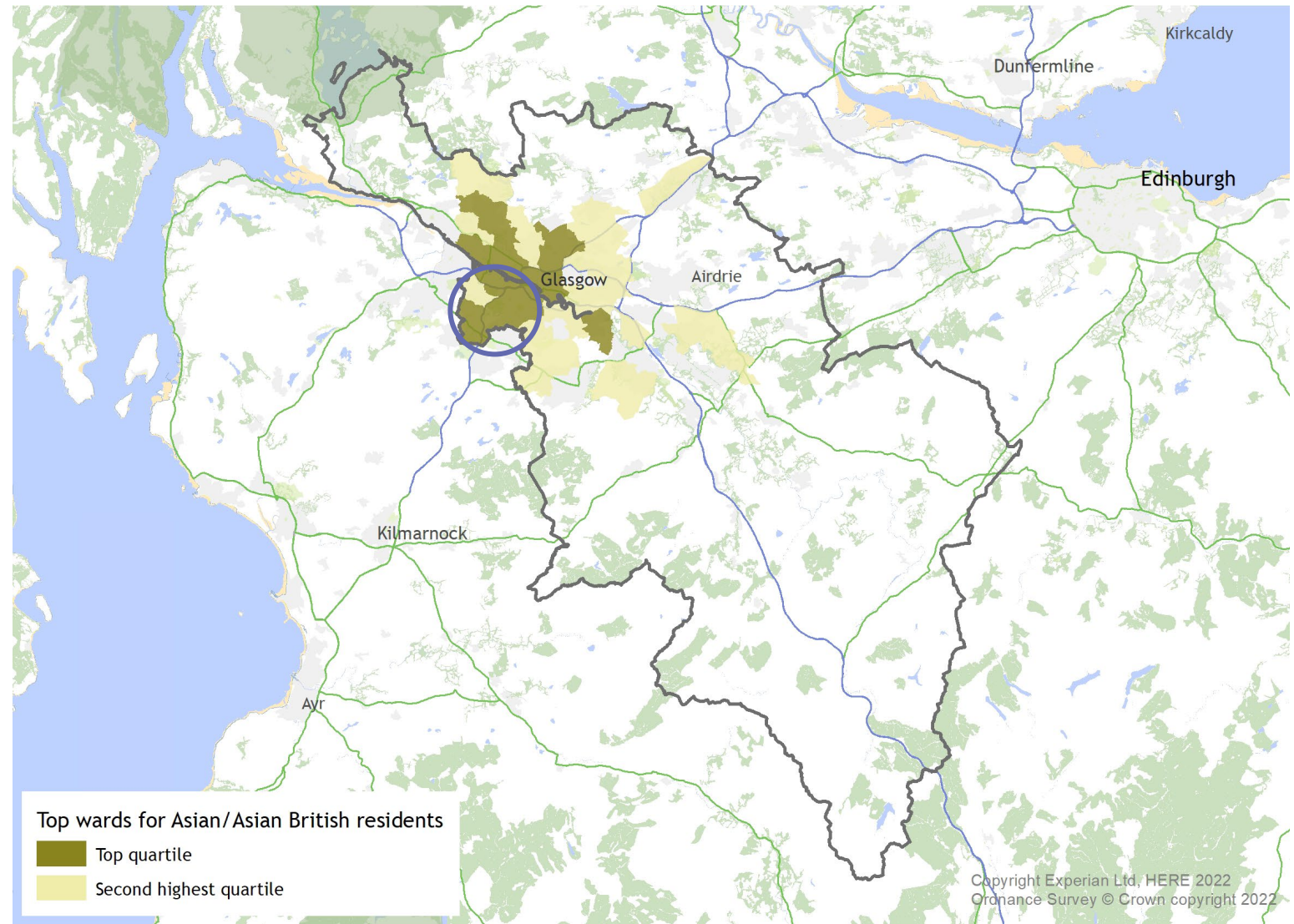
1. Cambuslang East
2. Greater Pollok
3. North East



Where do Asian/Asian British residents live?

Top wards:

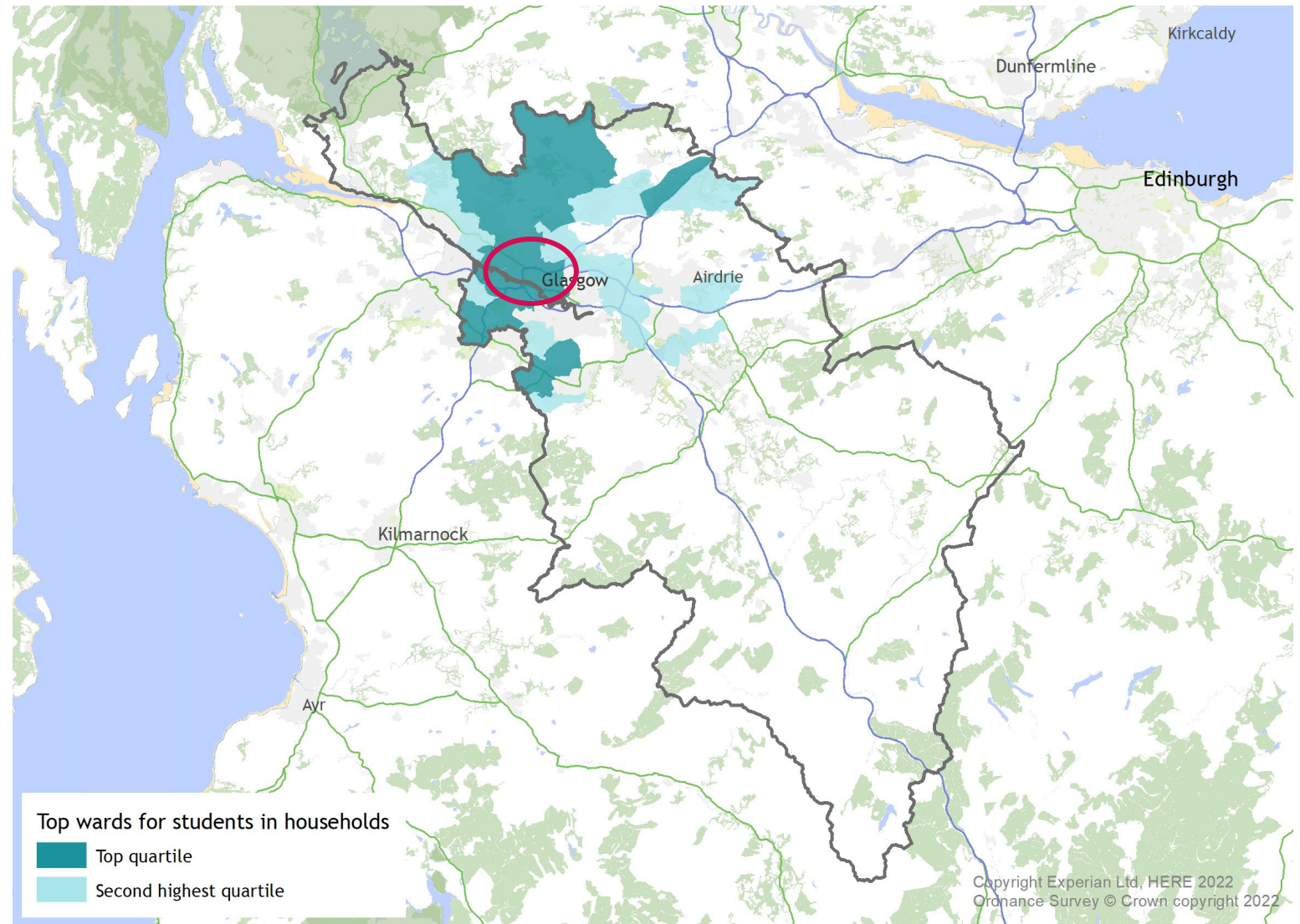
1. Pollokshields: 27% (of which 4/5 Pakistani, 1 in 10 Indian)
2. Southside Central: 20% (of which 2/3 Pakistani, 1 in 7 Indian)
3. Anderston/City/Yorkhill: 18% (almost half Chinese, 1/4 Indian)



Where do students live?

Top wards:

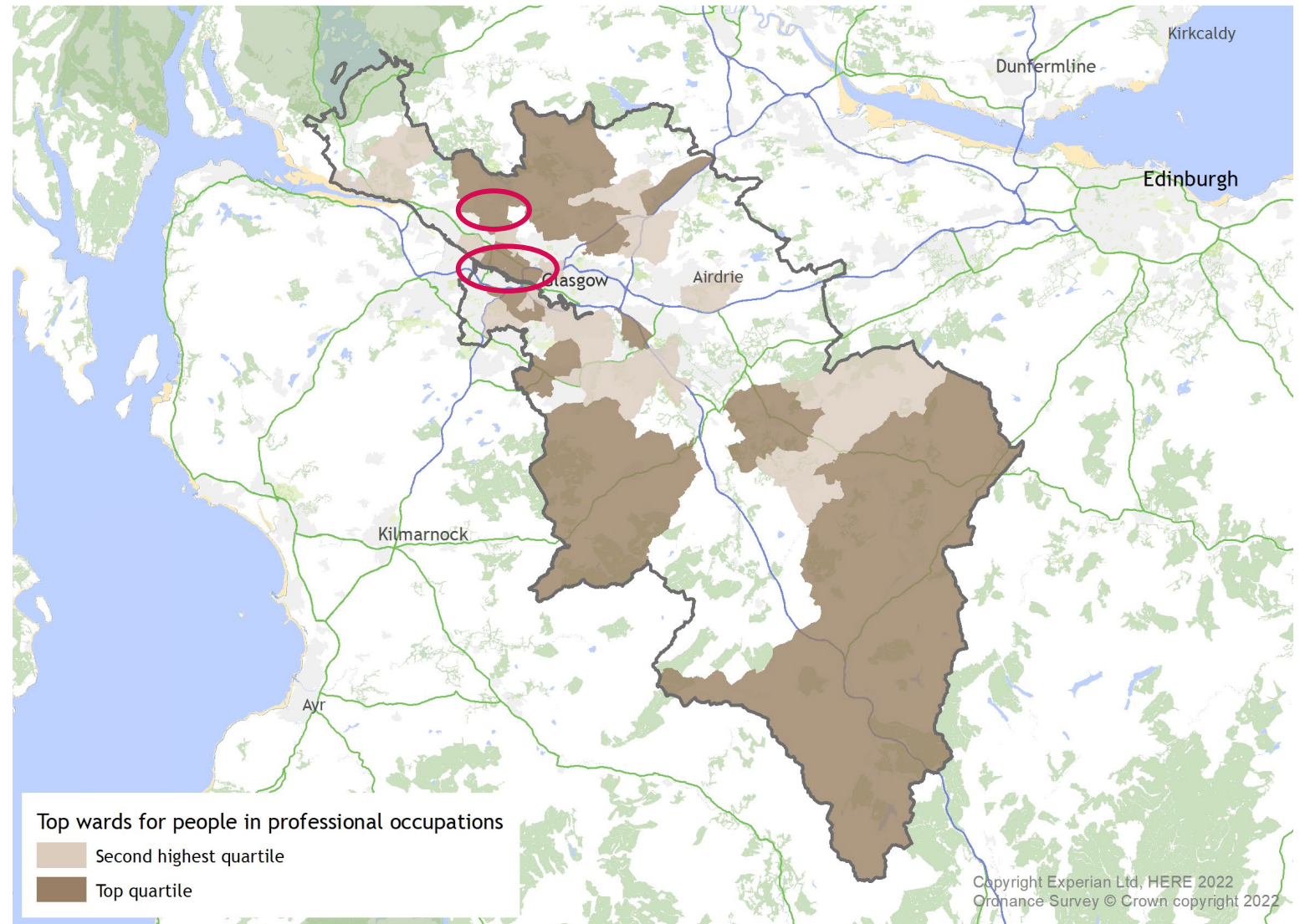
1. Anderston/City/Yorkhill
2. Hillhead
3. Partick East/Kelvindale



Where do those in professional occupations live?

Top wards:

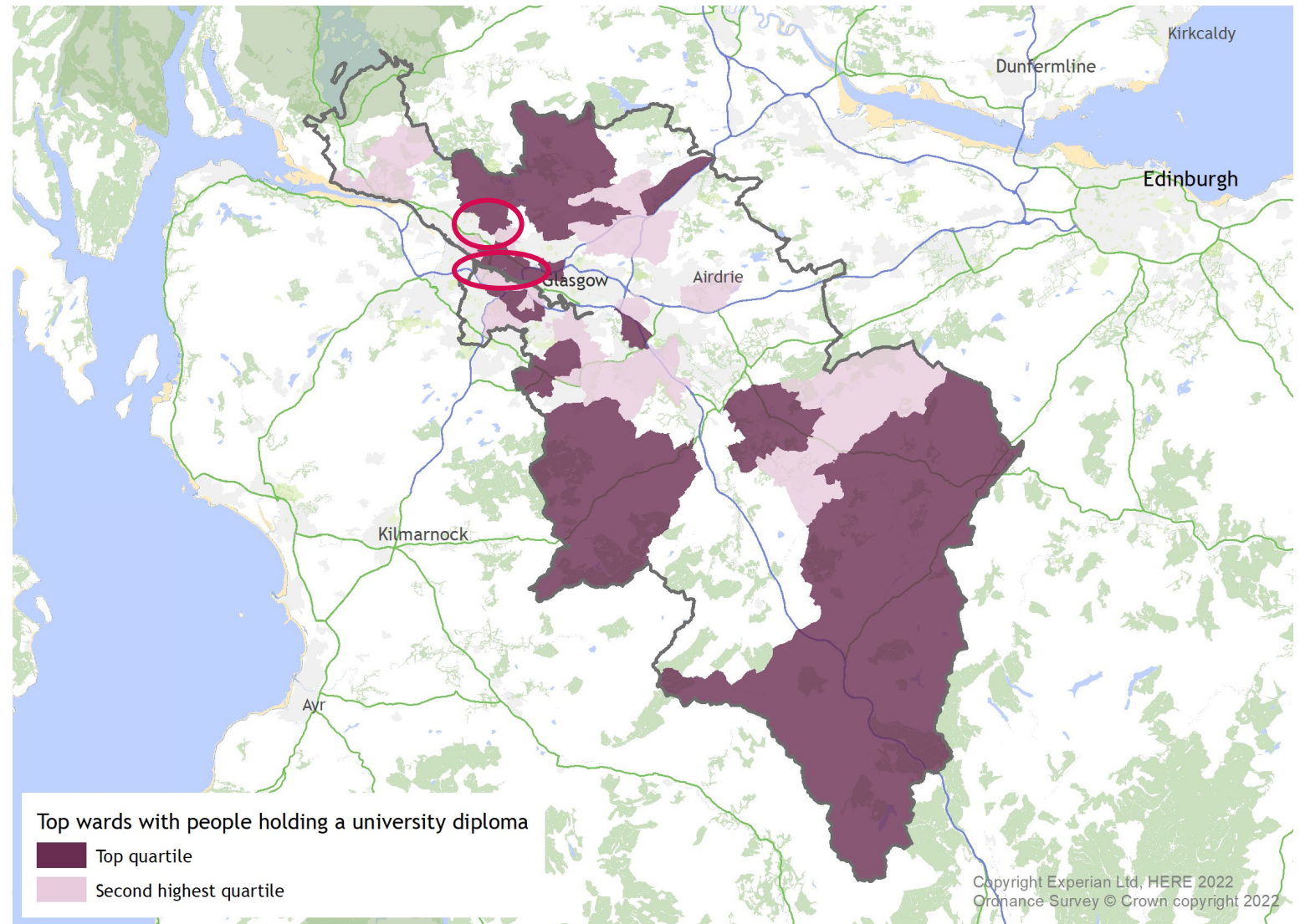
1. Partick East/Kelvindale
2. Victoria Park
3. Bearsden North



Where do university educated groups live?

Top wards:

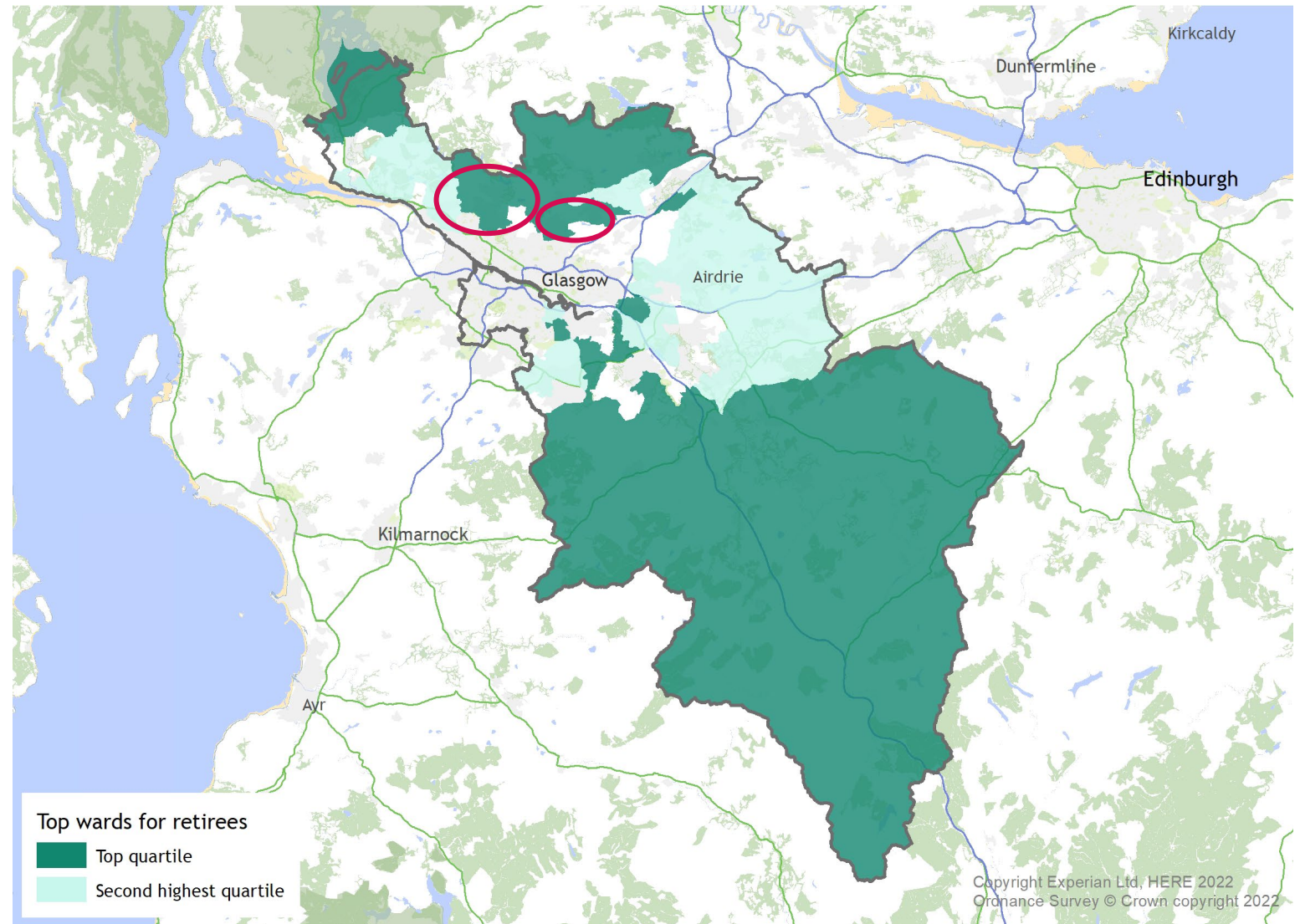
1. Partick East/Kelvindale
2. Bearsden North
3. Victoria Park



Where do retirees live?

Top wards:

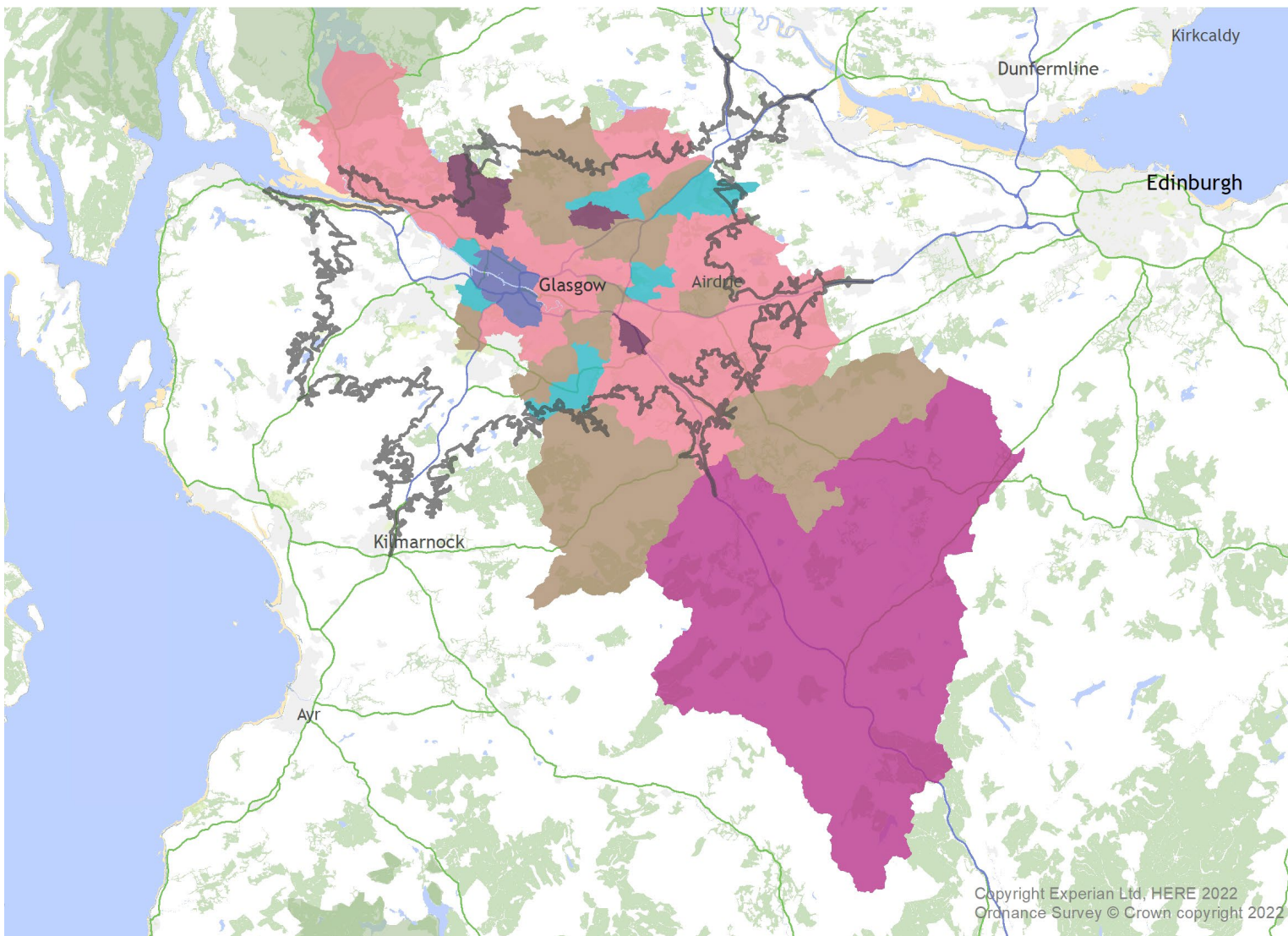
1. Bearsden North
2. Bearsden South
3. Bishopbriggs North and Campsie



Dominant Audience Spectrum Segment by Ward - Population

Dominant segment in households

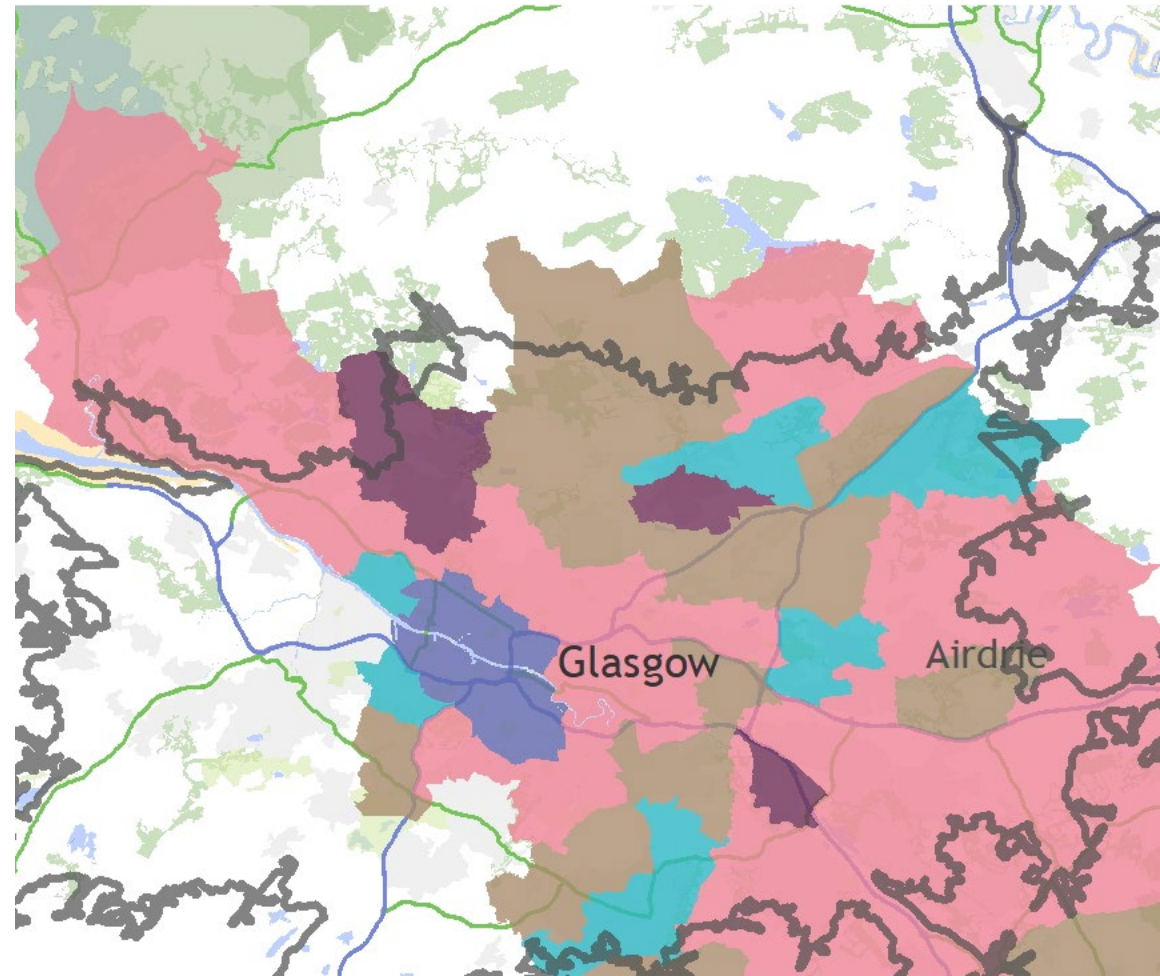
- Commuterland Culturebuffs
- Experience Seekers
- Dormitory Dependables
- Up Our Street
- Frontline Families
- Kaleidoscope Creativity



Dominant Audience Spectrum Segment by Ward - Population

Dominant segment in households

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Wards with Highest % by Audience Spectrum

Segment	Highest	Second Highest	Third Highest
Metroculturals	Partick East/Kelvindale (32%)	Hillhead (16%)	Pollokshields (11%)
Commuterland Culturebuffs	Bearsden South (63%)	Bearsden North (57%)	Milngavie (40%)
Experience Seekers	Anderston/City/Yorkhill (79%)	Hillhead (67%)	Langside (61%)
Dormitory Dependables	Bishopbriggs South (46%)	Cumbernauld North (44%)	Cambuslang East (43%)
Trips & Treats	Mossend and Holytown (21%)	East Kilbride East (19%)	East Kilbride Central North (17%)
Home & Heritage	Clydesdale East (19%)	Milngavie (14%)	Bishopbriggs North and Campsie (13%)
Up Our Street	East Kilbride Central South (46%)	Cumbernauld East (45%)	Cumbernauld South (36%)
Frontline Families	Clydesdale East (22%)	Clydesdale South (22%)	East Kilbride South (20%)
Kaleidoscope Creativity	Canal (43%)	Dennistoun (42%)	Maryhill (42%)
Supported Communities	East Centre (24%)	Wishaw (22%)	Fortissat (21%)

Who is the Local Audience?

About Local Audiences

Audience Finder ticketing:

Local Venues Included:

- CCA Glasgow
- Citizens Theatre
- Cumbernauld Theatre
- Glasgow Film
- Glasgow Life
- Glasgow Studio Orchestra
- National Theatre of Scotland
- Platform
- Royal Conservatoire of Scotland
- Tron Theatre

West Central Scotland

	16-17	19-20	Change
Bookers	67,821	65,155	- 4%
Bookings	154,098	134,881	- 14%
Tickets	349,458	305,080	- 15%
Income	£6,225,750	£6,094,186	- 2%

Scotland

	16-17	19-20	Change
Bookers	293,731	297,526	+1%
Bookings	684,906	691,034	+1%
Tickets	1,692,794	1,689,621	0%
Income	£32,197,187	£33,886,159	+5%

Profile of Local Audiences

Key differences by artform:

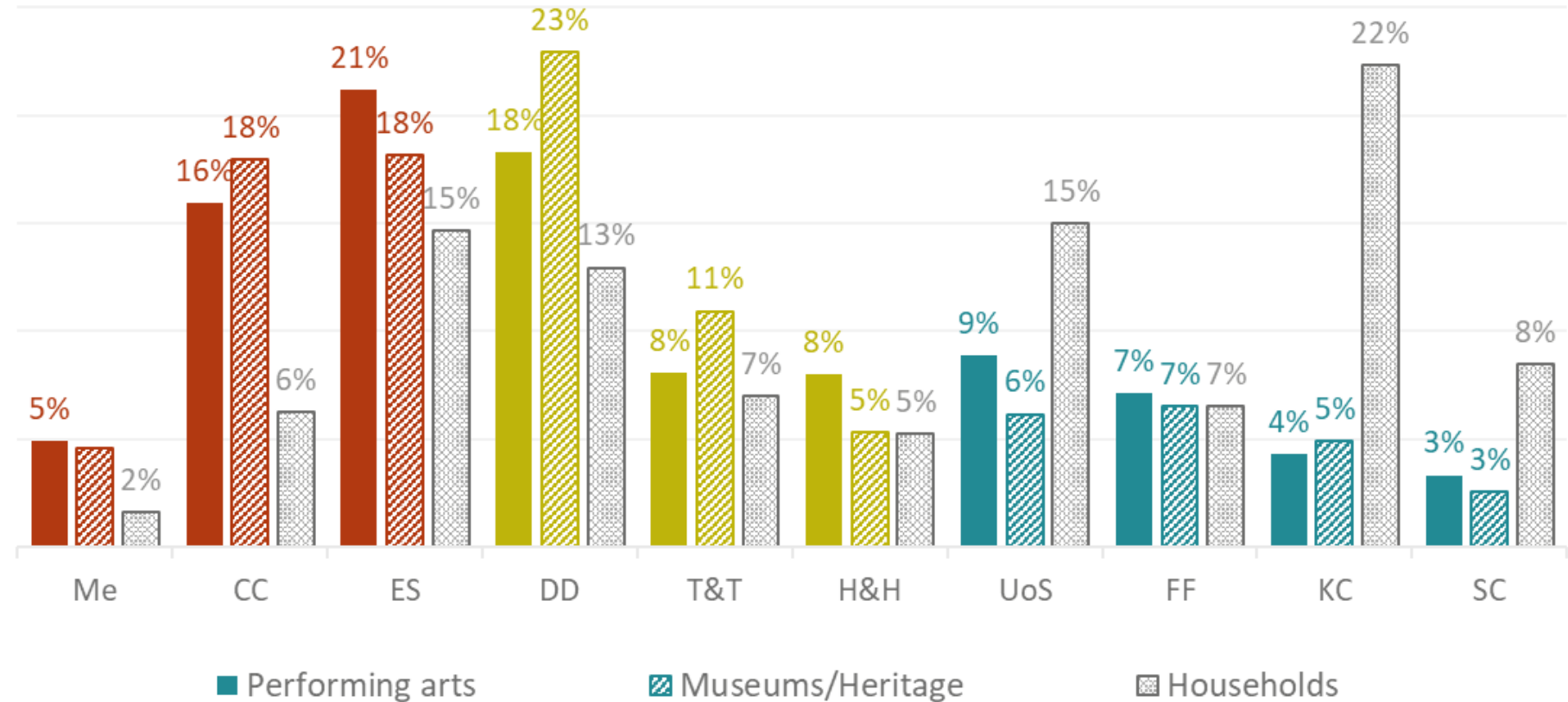
Kaleidoscope Creativity:
6% Children/Family show

Experience Seekers:
40% Film
29% Plays/Drama

Dormitory Dependables:
27% Children/Family shows

Up Our Street:
10% Music

Kaleidoscope Creativity are most underrepresented in bookers



Audience Trends

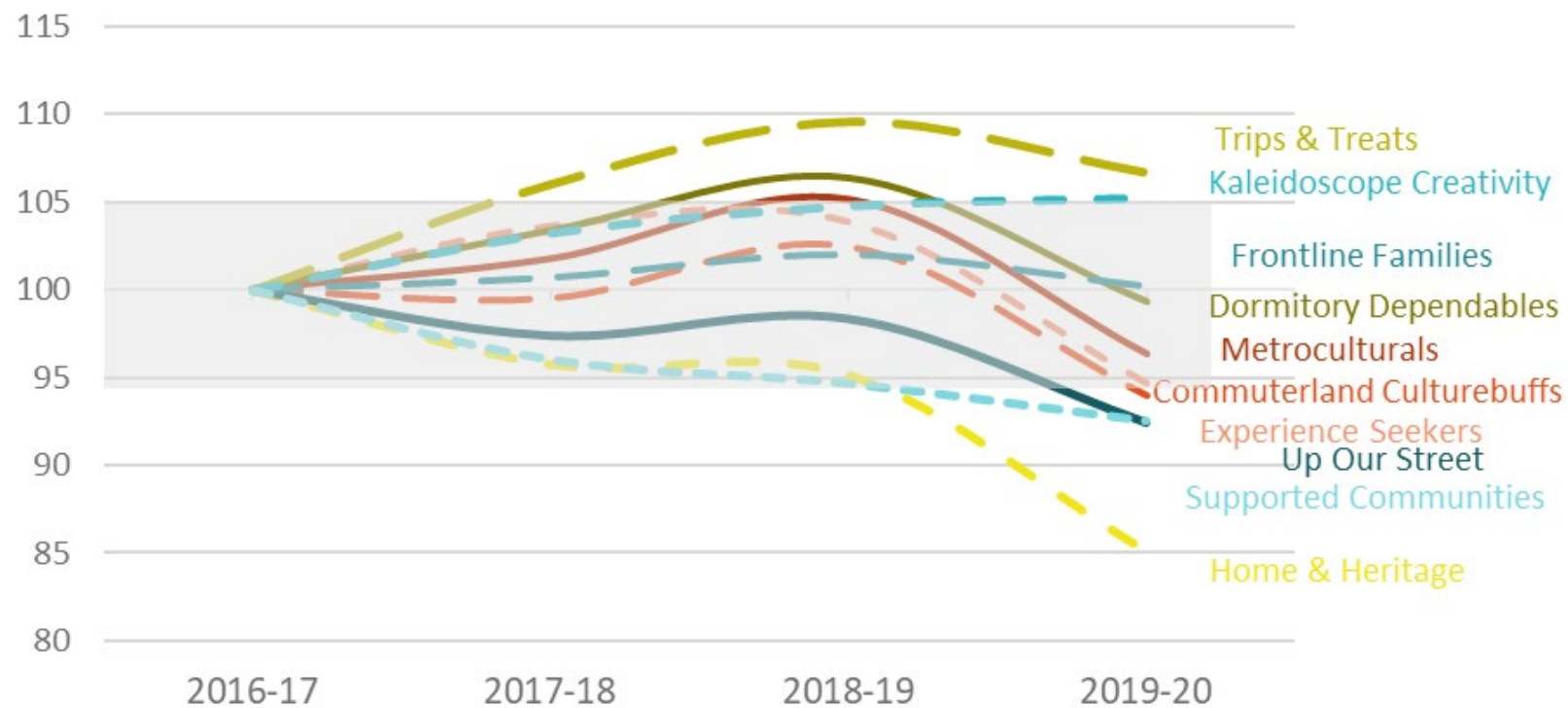
Families
Lower/Middle
Income



Older / Lower
income



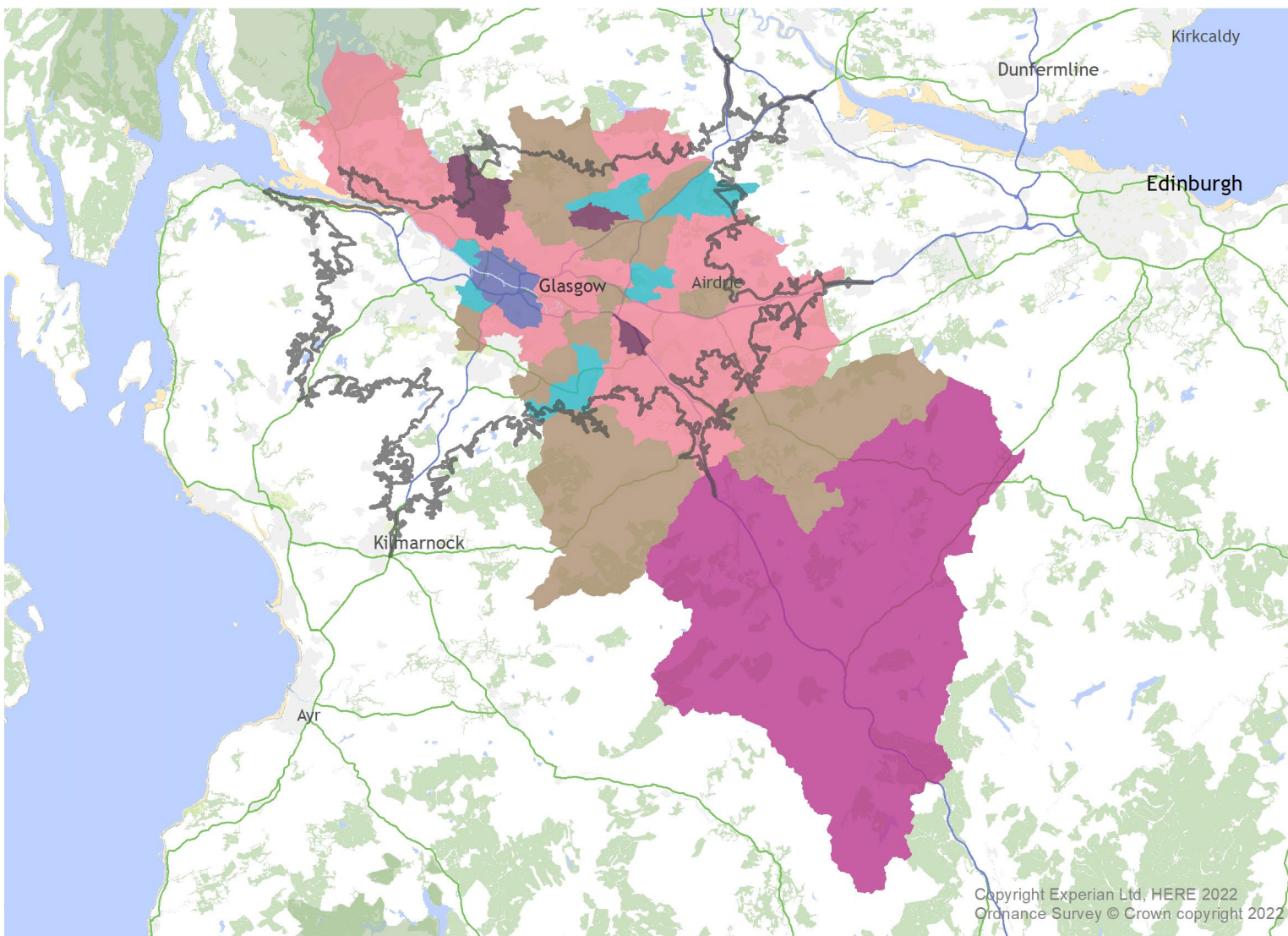
Audience trend - index



Dominant Audience Spectrum Segment by Ward - Population

Dominant segment in households

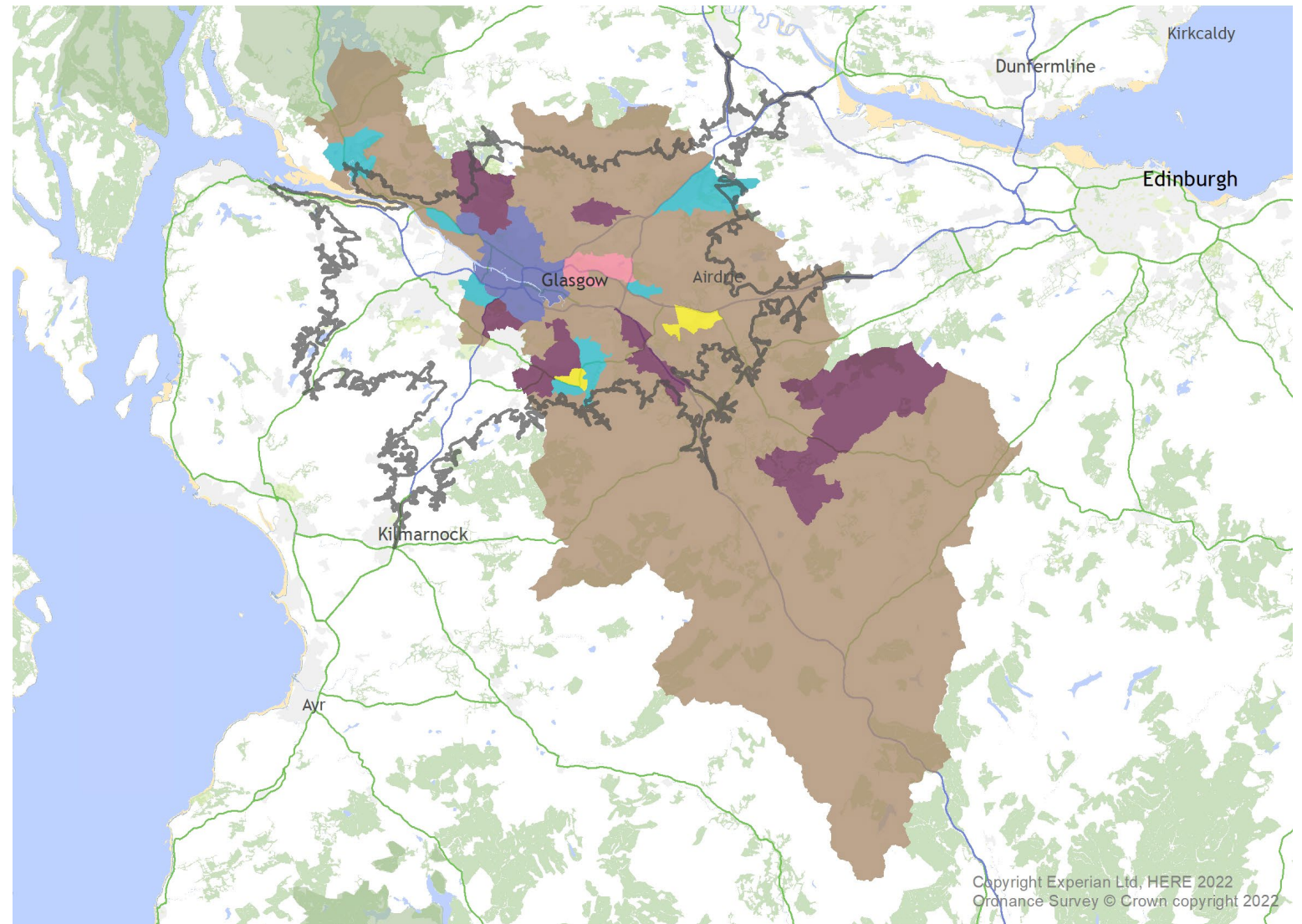
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Dominant Audience Spectrum Segment by Ward - Bookers

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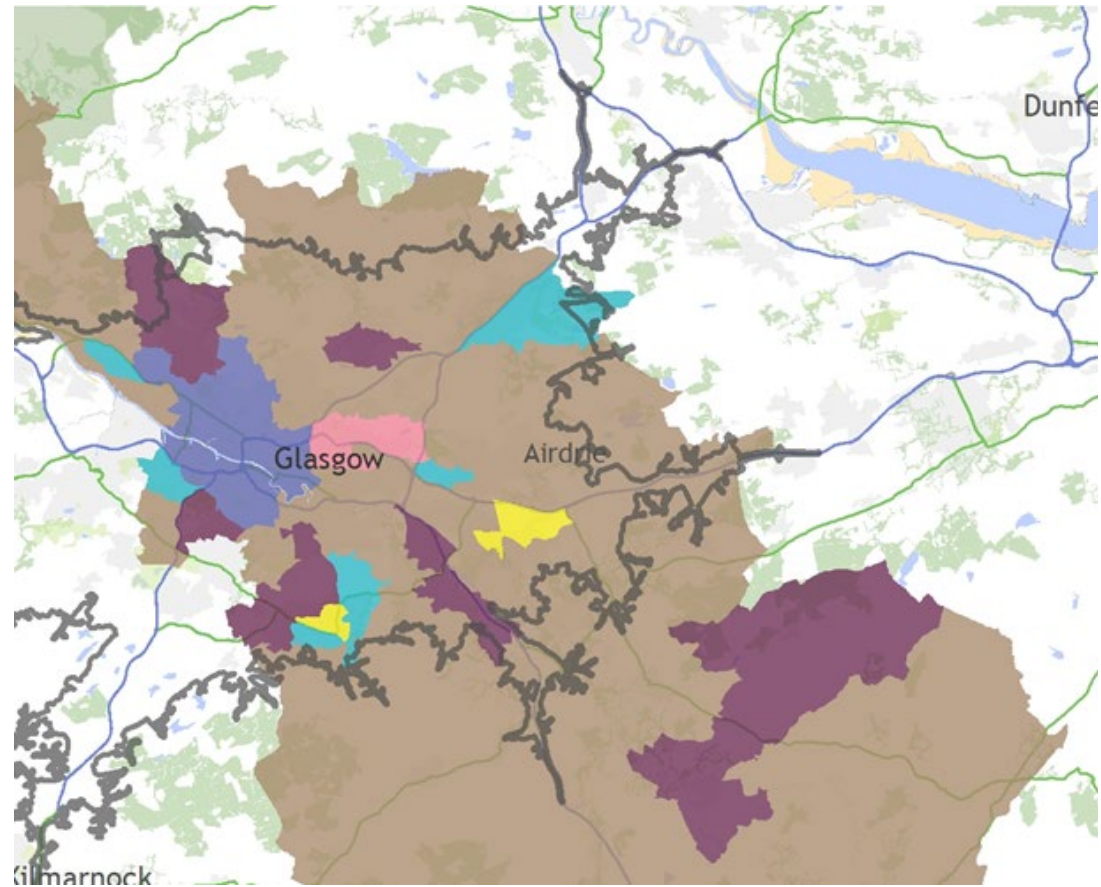
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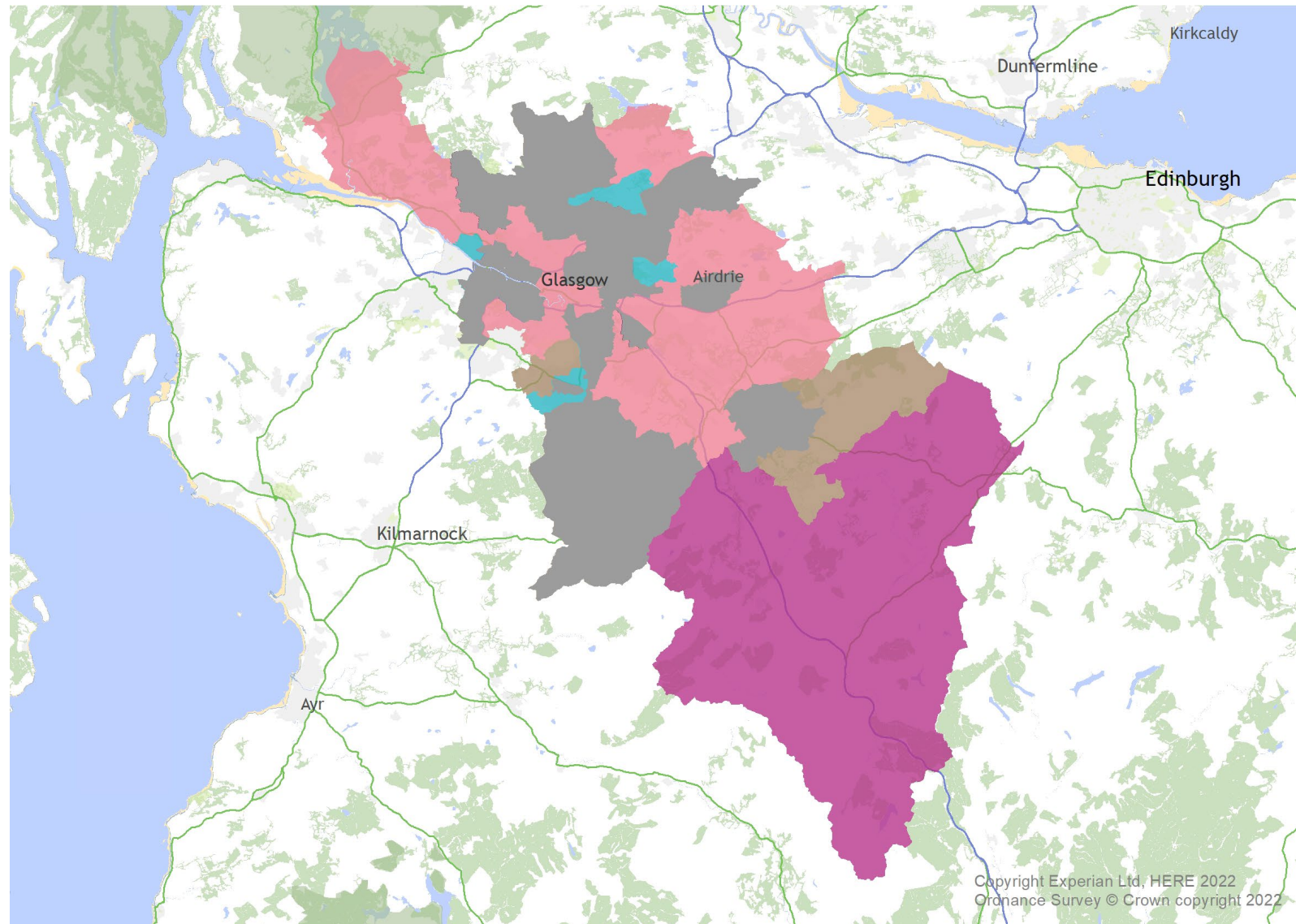
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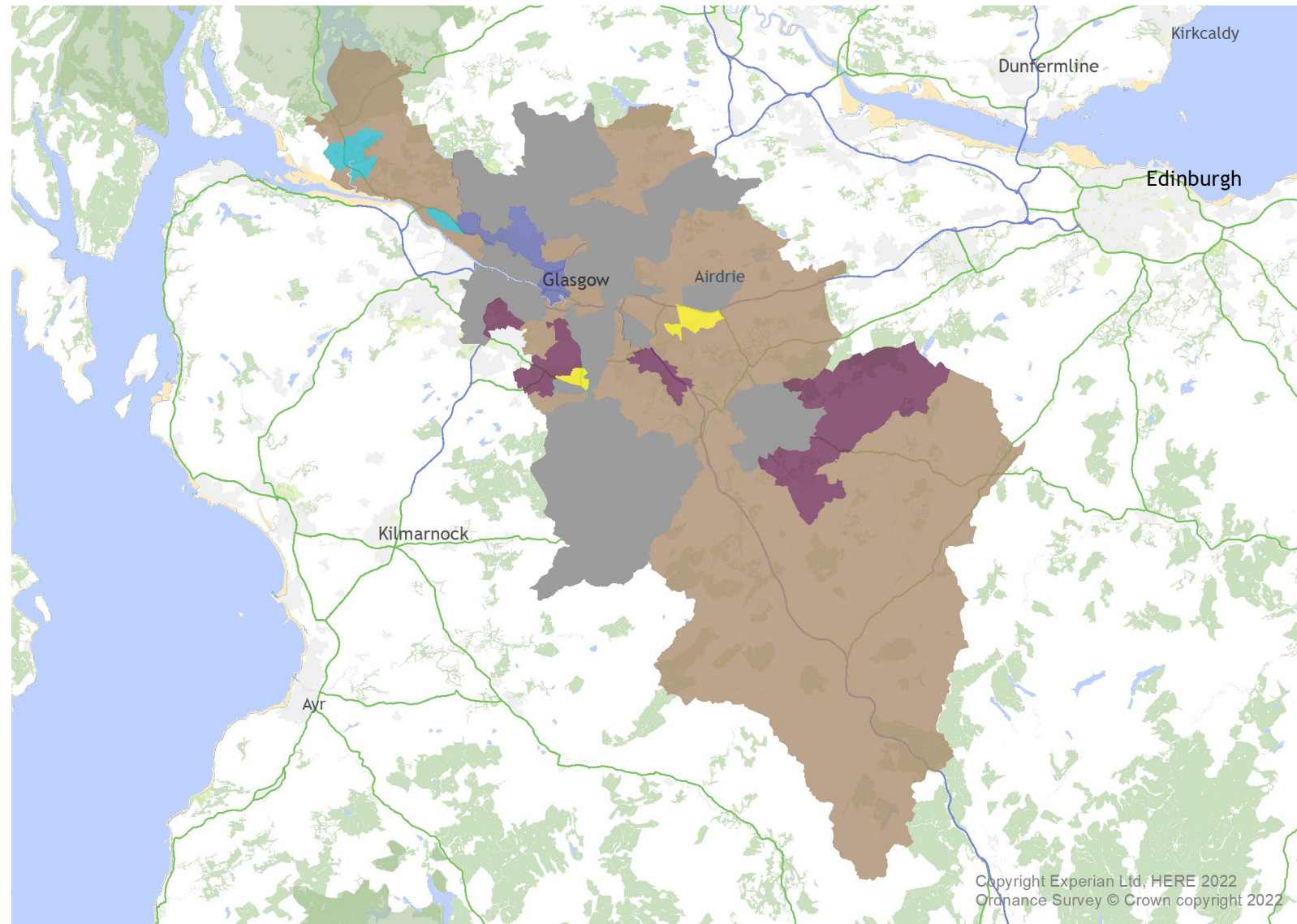
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Dominant Audience Spectrum Segment by Ward - Bookers

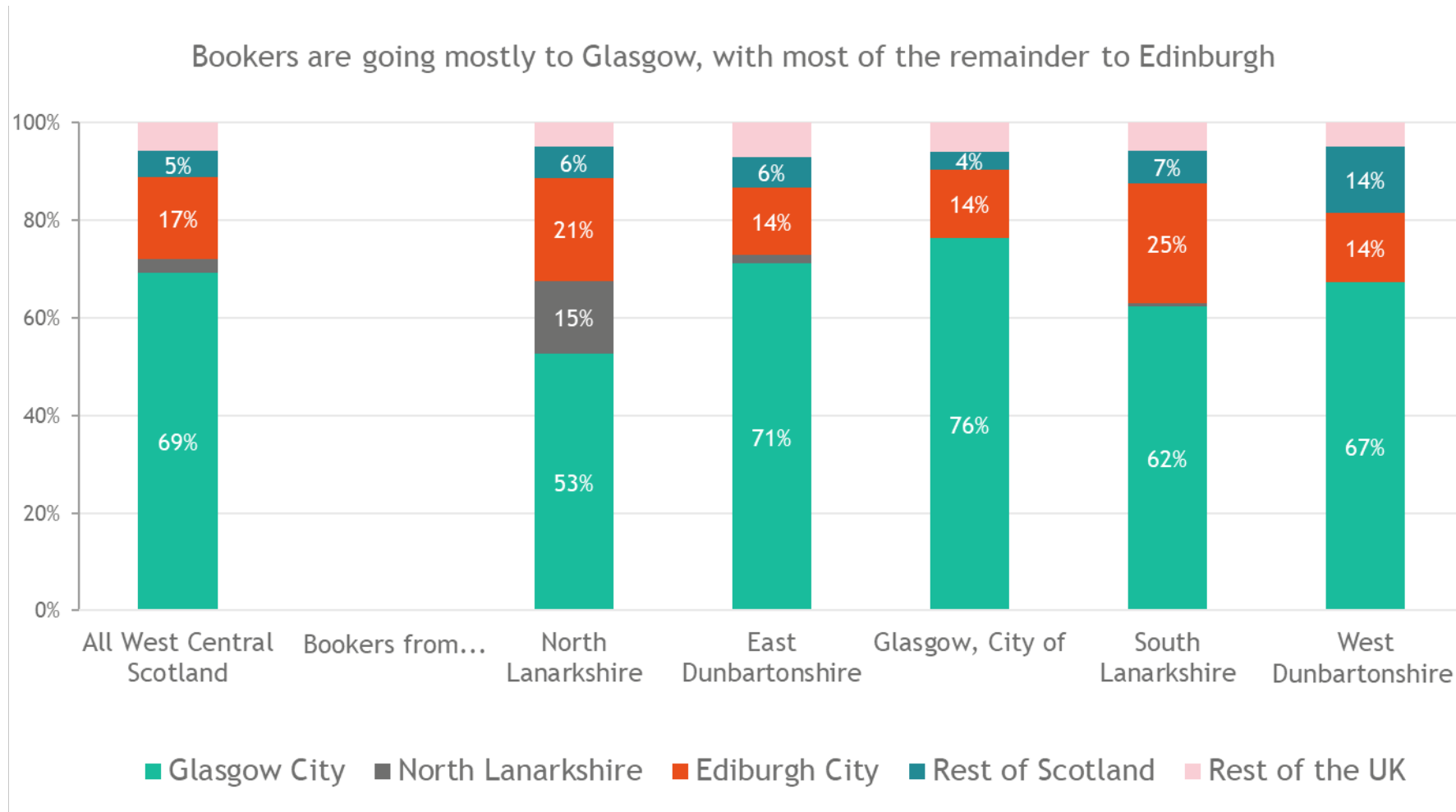
Dominant segment in households

- Commuterland Culturebuffs
- Experience Seekers
- Dormitory Dependables
- Trips & Treats
- Up Our Street



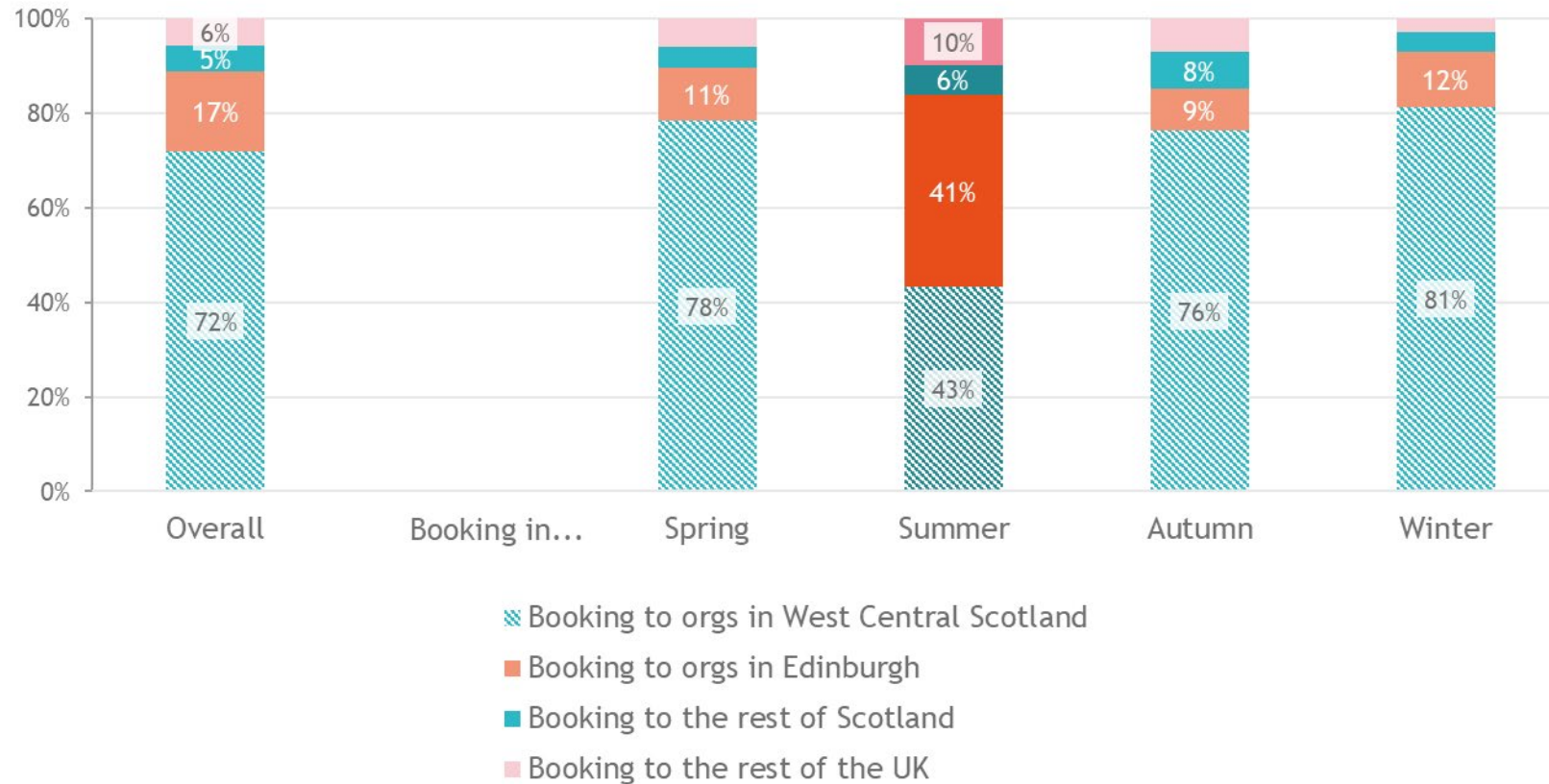
Where are Local Audiences Attending?

Local/Non-Local Audiences



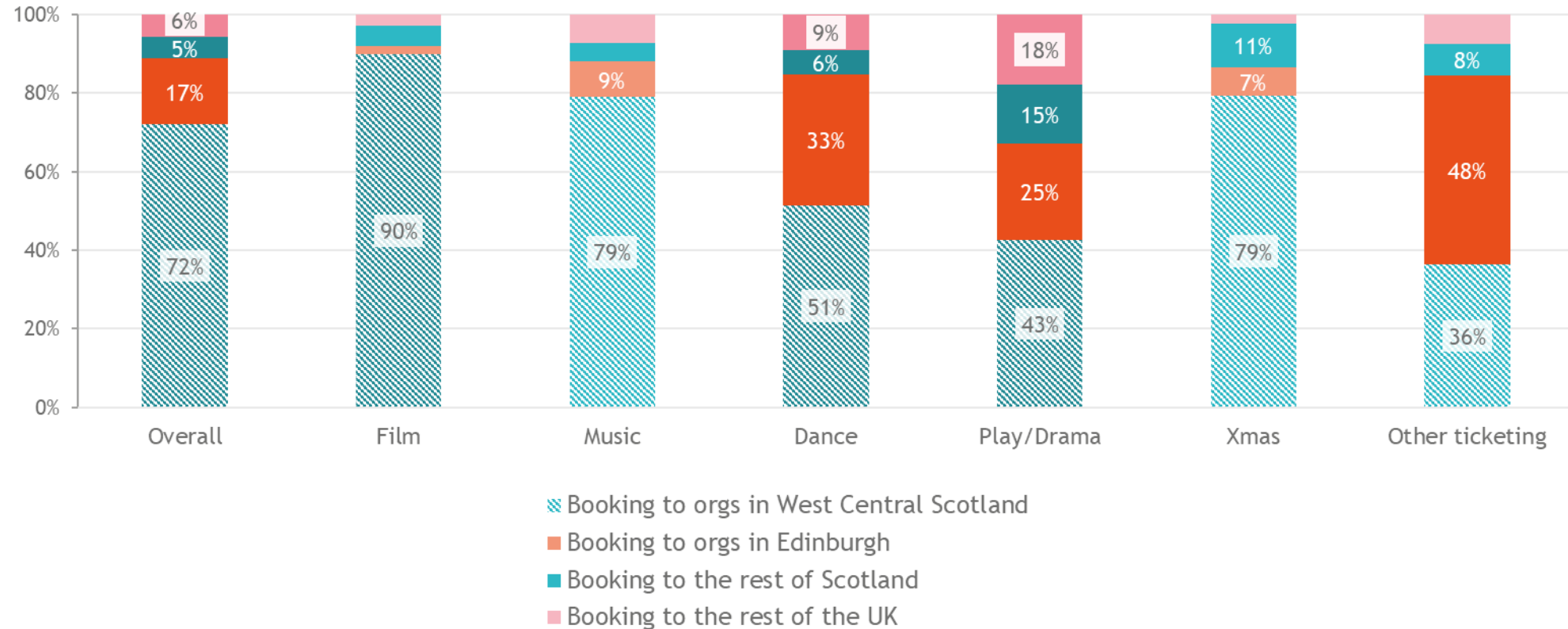
Local/Non-Local Audiences

The proportion of non-local bookings grows in the Summer, but remains primarily in Scotland

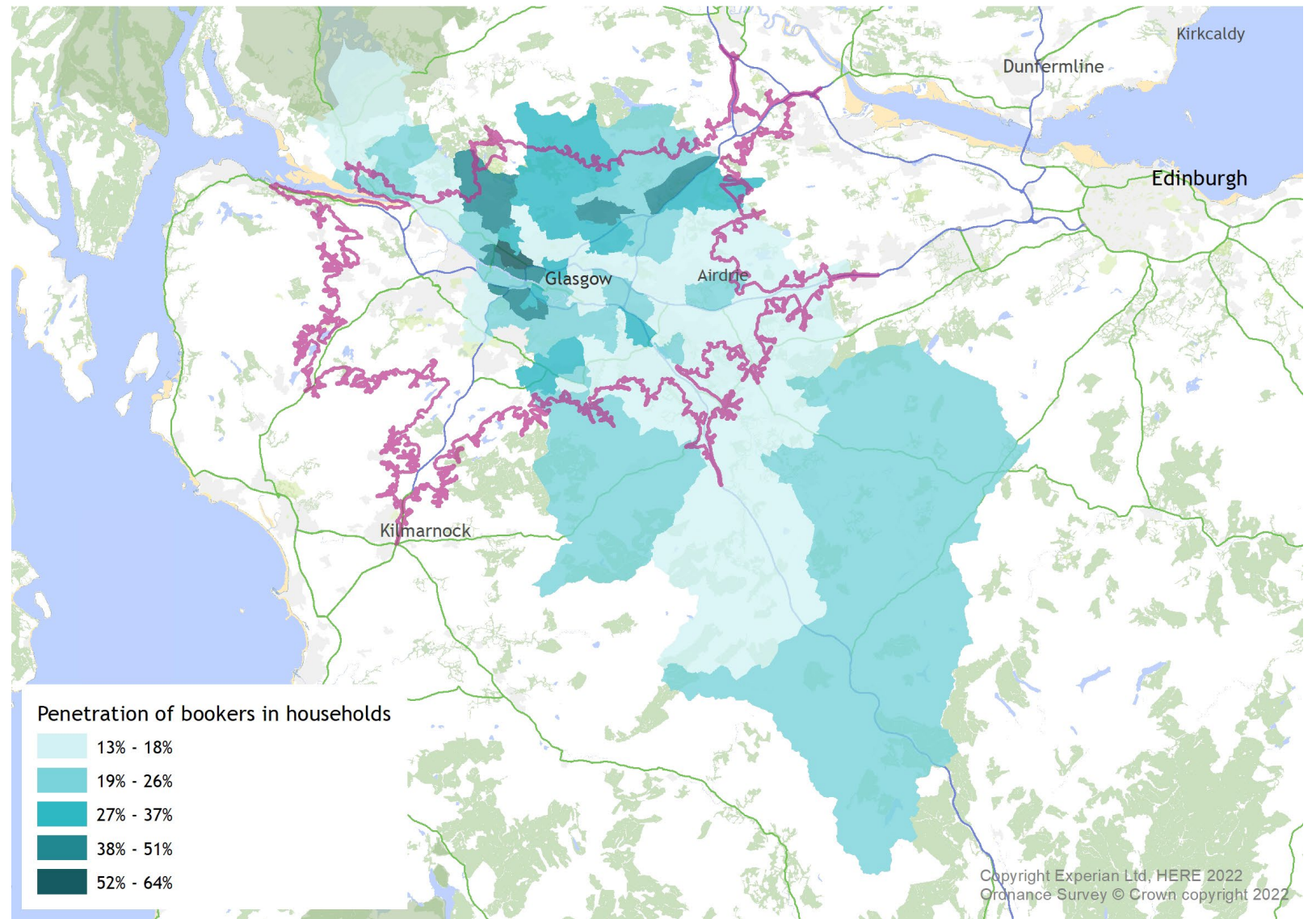


Local/Non-Local Audiences

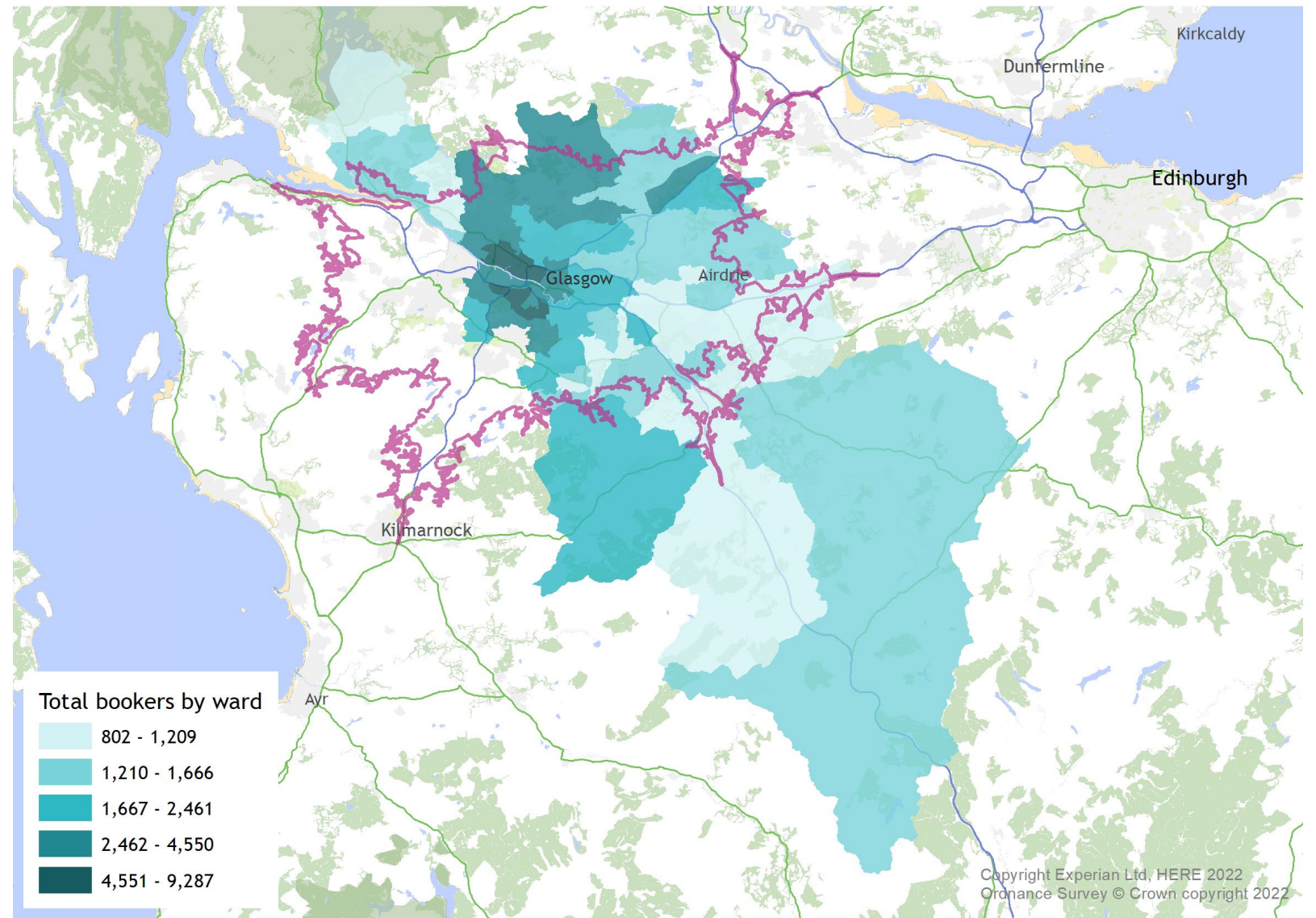
For Film, West Central Scotland bookers tend to visit almost exclusively local venues, for Dance and Plays/Drama, they book to venues out of the local area around half of the time



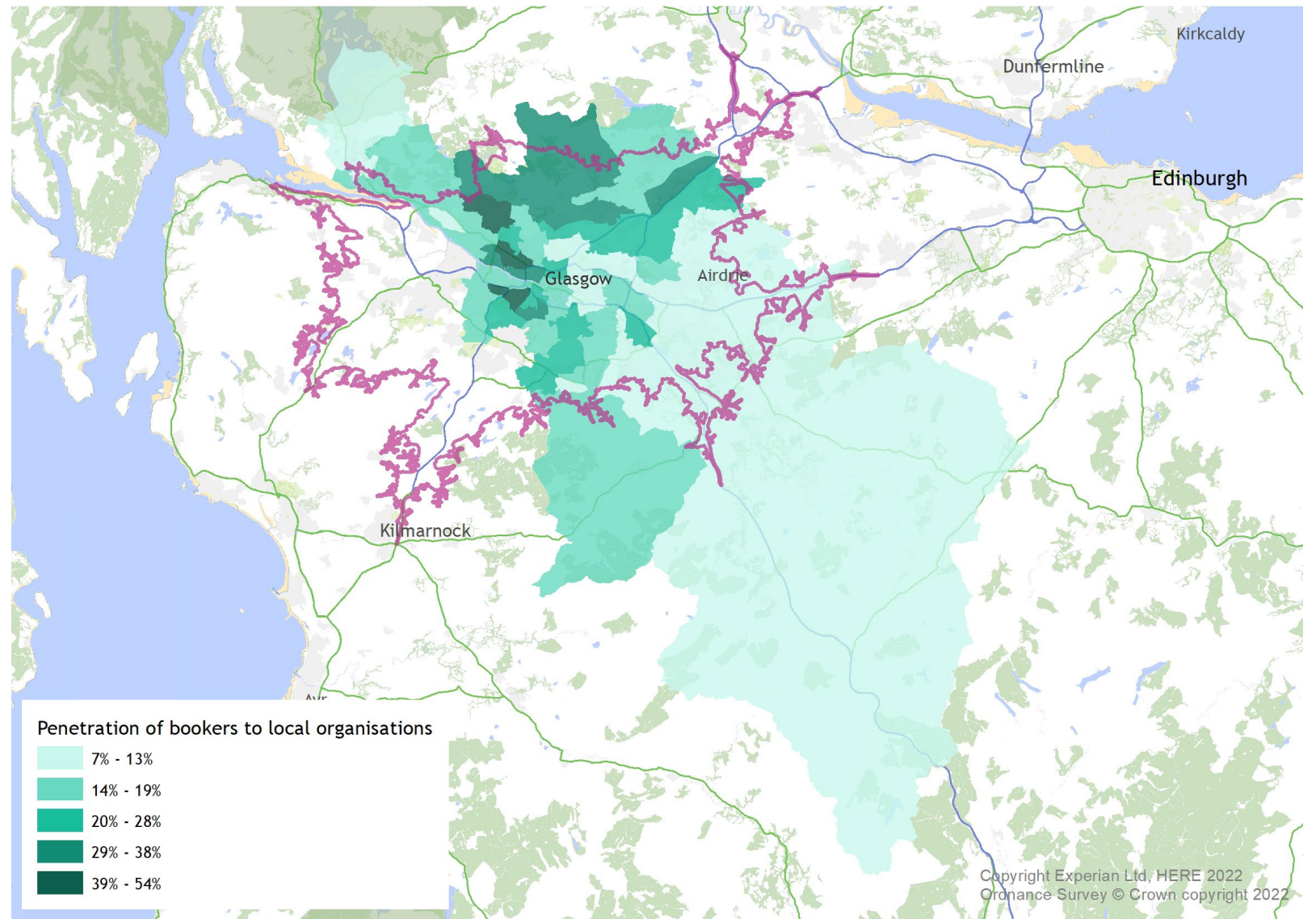
Audience Concentrations – Household Penetration



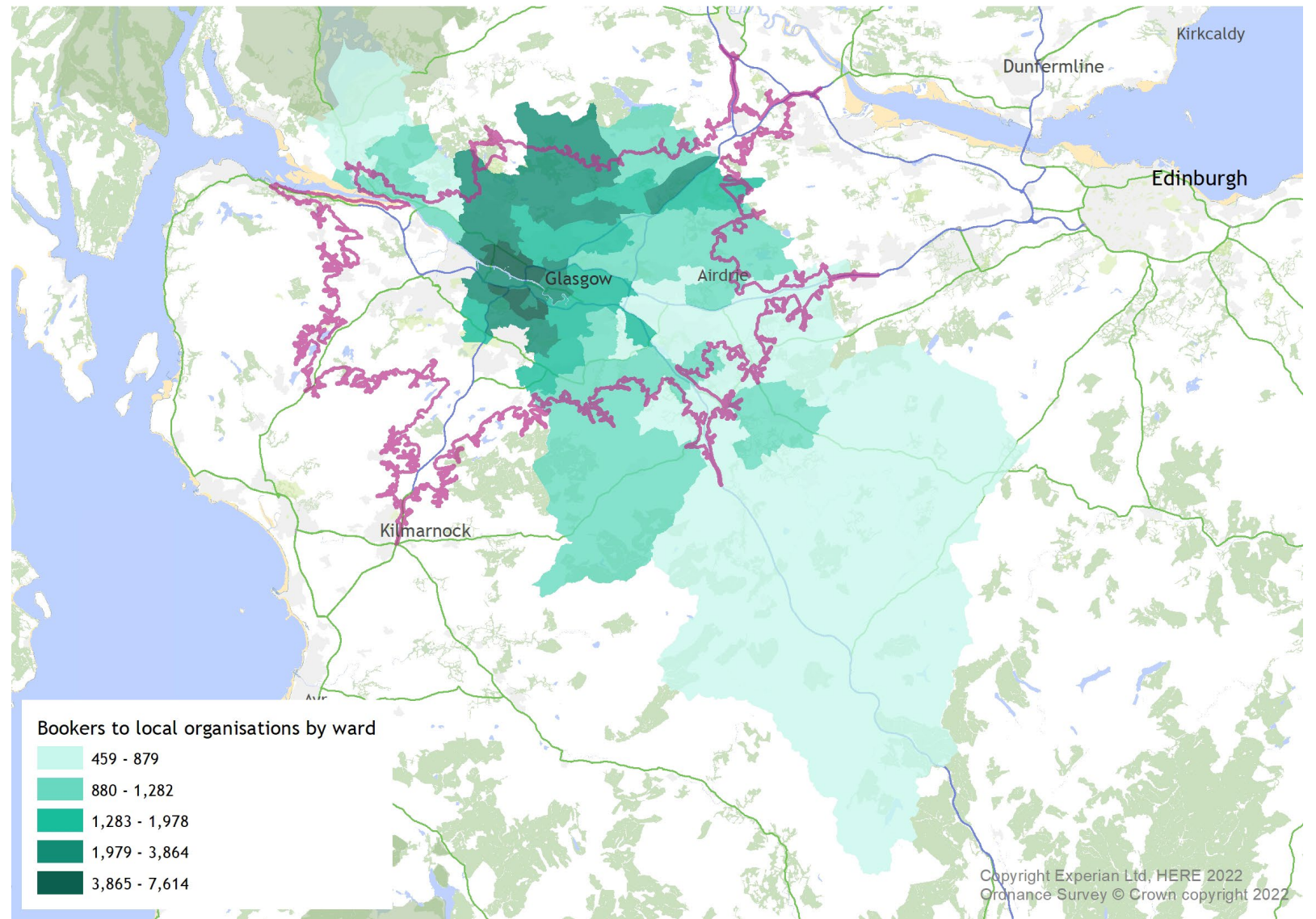
Audience Concentrations – Booker Count



Audience Concentrations – Local organisations penetration



Audience Concentrations – Local organisations booker count



What Do We Know About Non-Local Audiences to the Local Area?

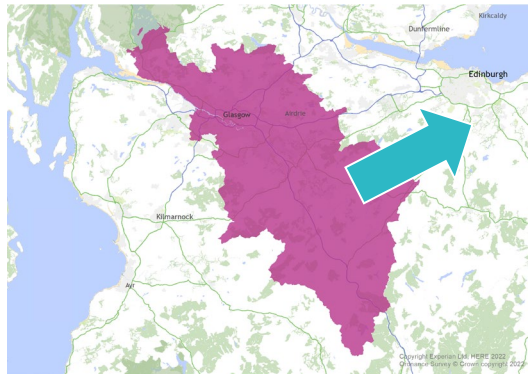
Non-Local Audiences



Non-Local Audiences

	Local bookers to non-local orgs.	Non-Local bookers to local orgs.
Metroculturals	5%	6%
Commuterland Culturebuffs	16%	28%
Experience Seekers	23%	10%
Dormitory Dependables	19%	19%
Trips & Treats	9%	7%
Home & Heritage	7%	14%
Up Our Street	8%	6%
Frontline Families	6%	3%
Kaleidoscope Creativity	4%	2%
Supported Communities	3%	2%

Non-Local Audiences – volume of tickets

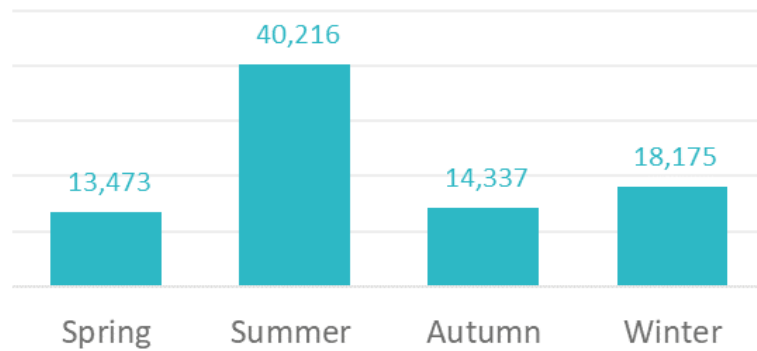


86k

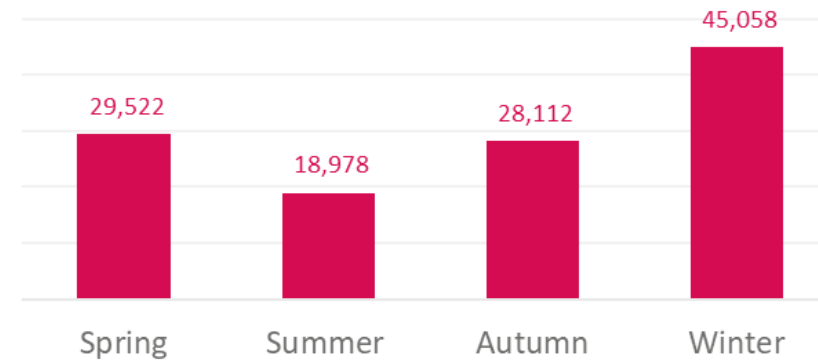


122k

Seasonal tickets - local bookers to non-local organisations

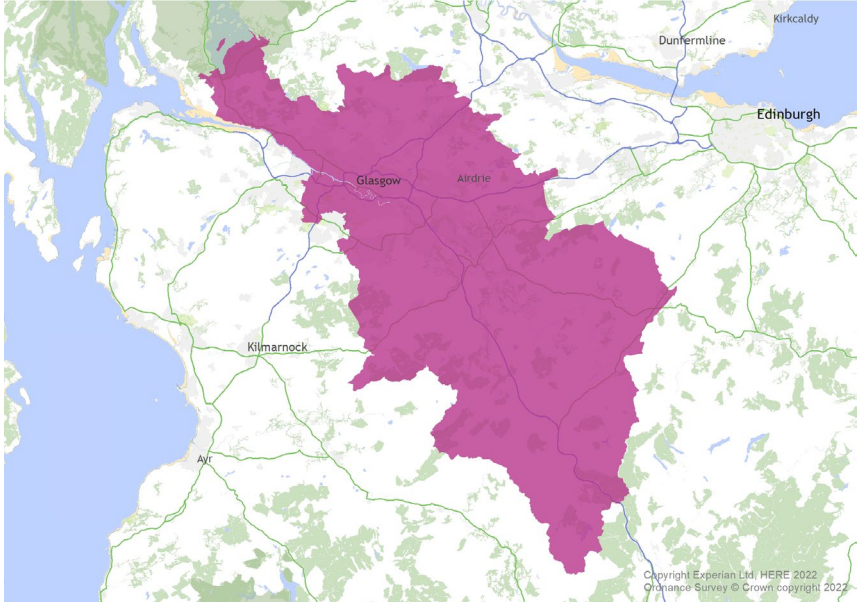
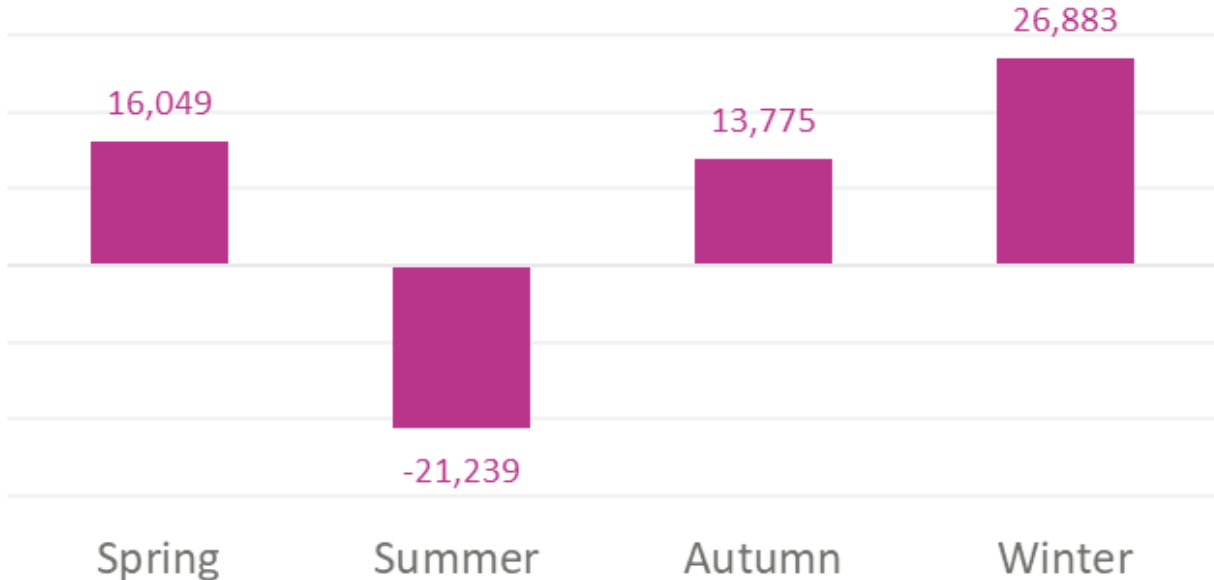


Seasonal tickets - non-local bookers to local organisations

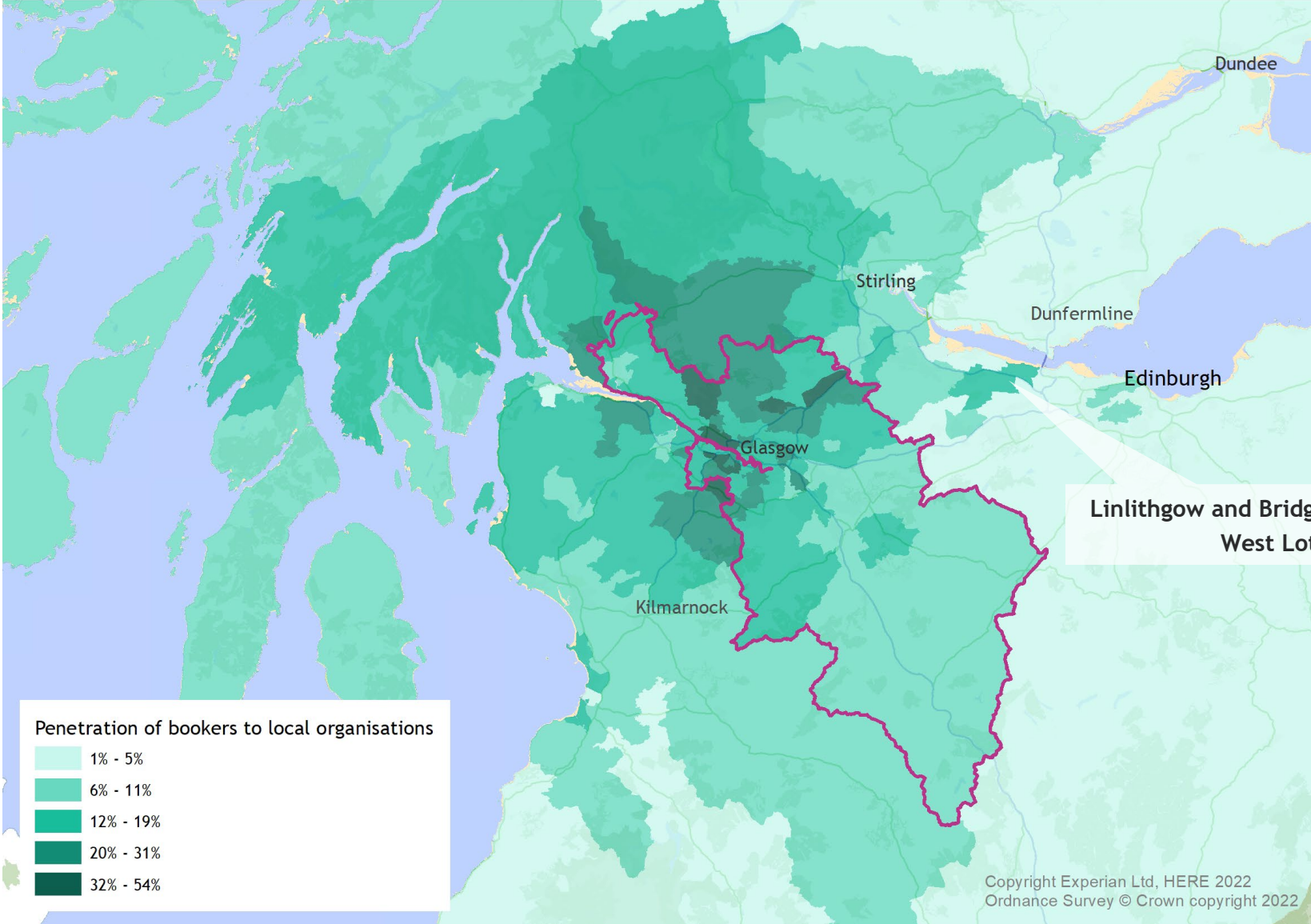


Non-Local Audiences

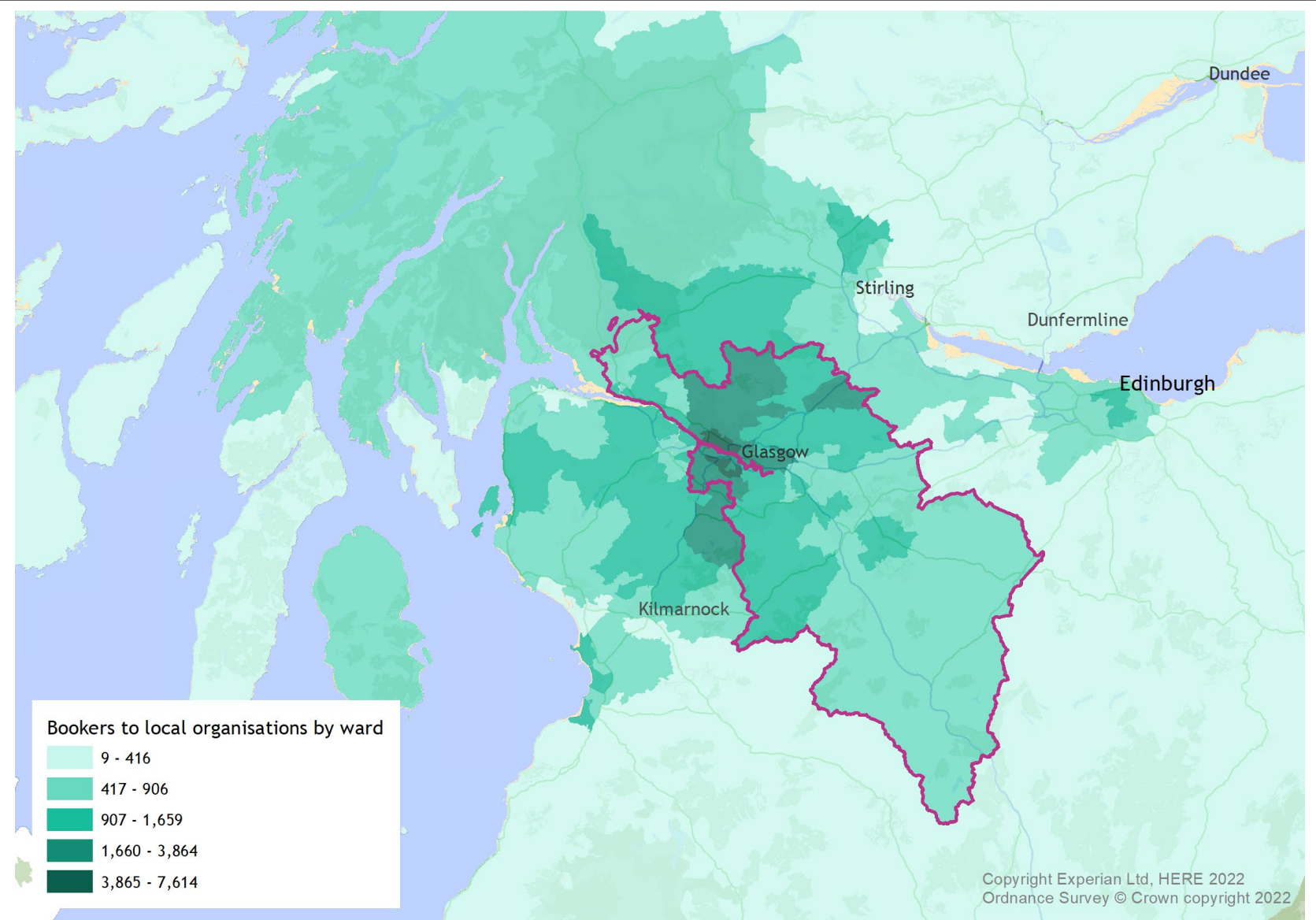
35k Net Flow In/Out



Bookers to local organisations – from further afield



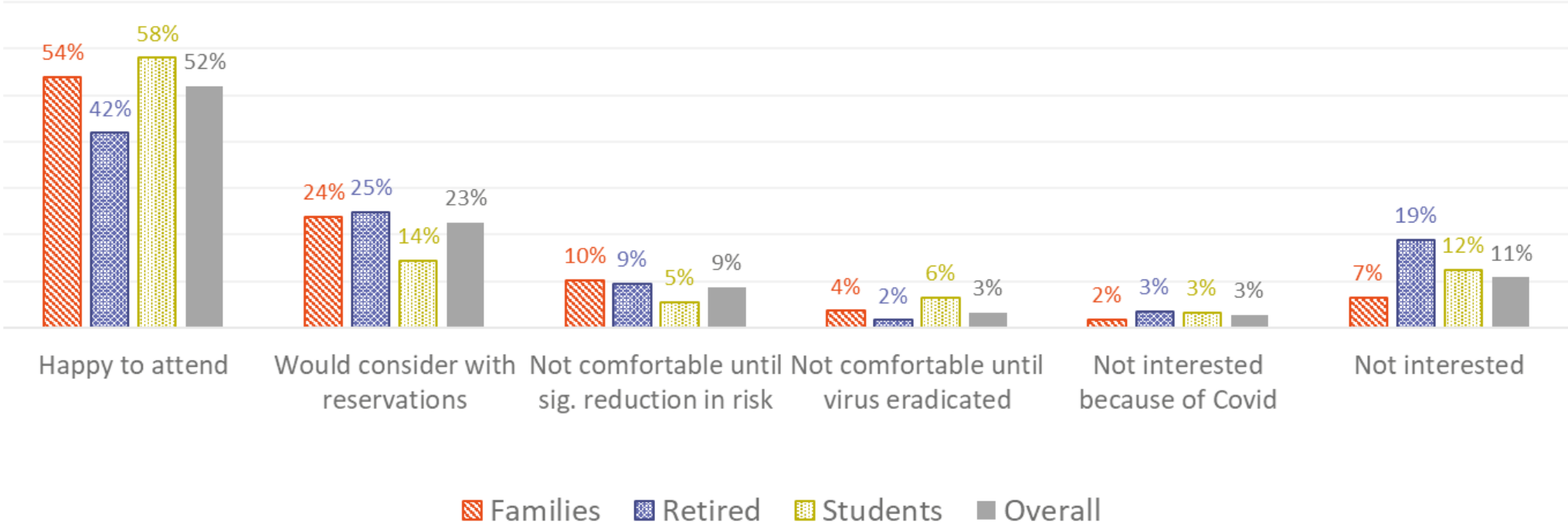
Bookers to local organisations – from further afield



What Else Can We Say About Local Audiences?

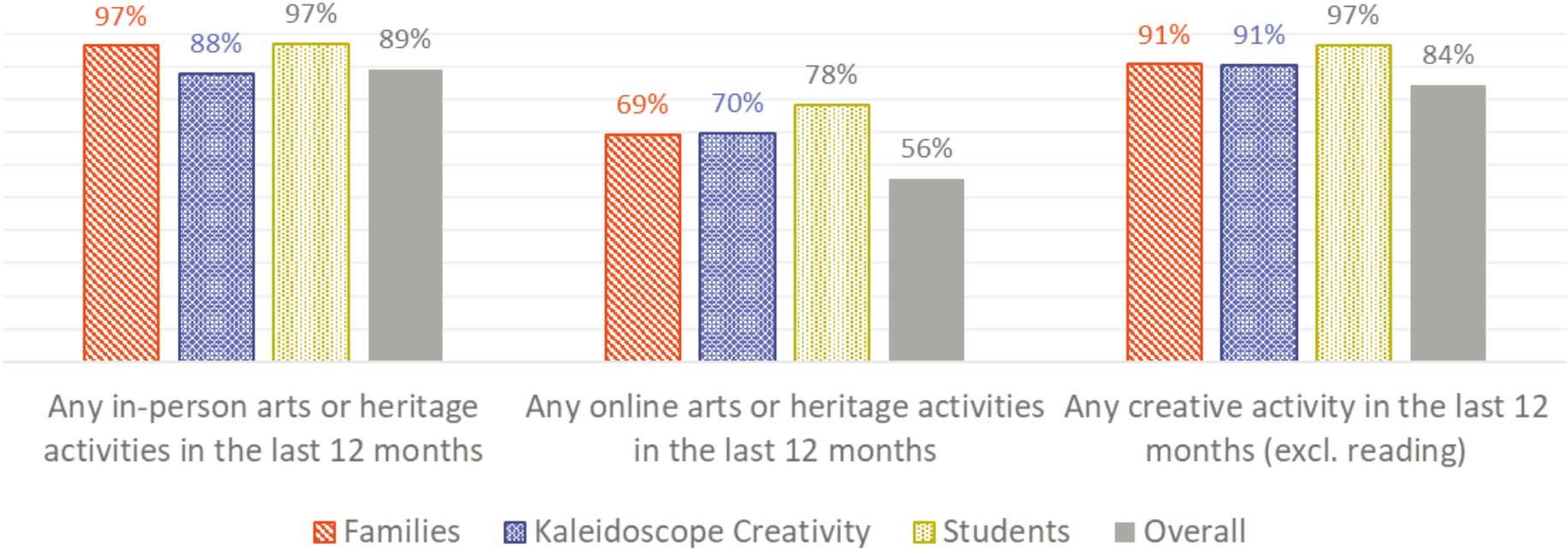
Insights from the Cultural Participation Monitor

Willingness to attend is higher for families and students and much lower for retirees



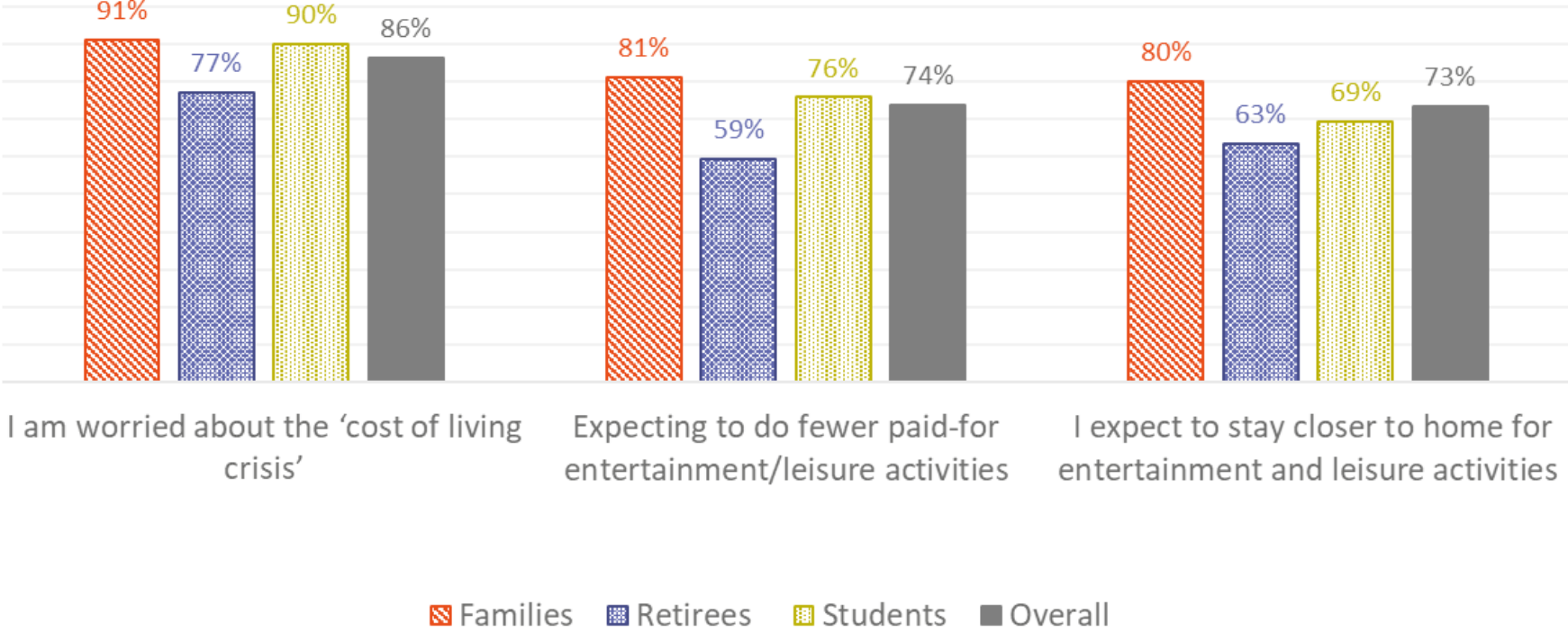
Insights from the Cultural Participation Monitor

Families and students were more likely to have taken part in any arts/heritage or creative activity in the last year



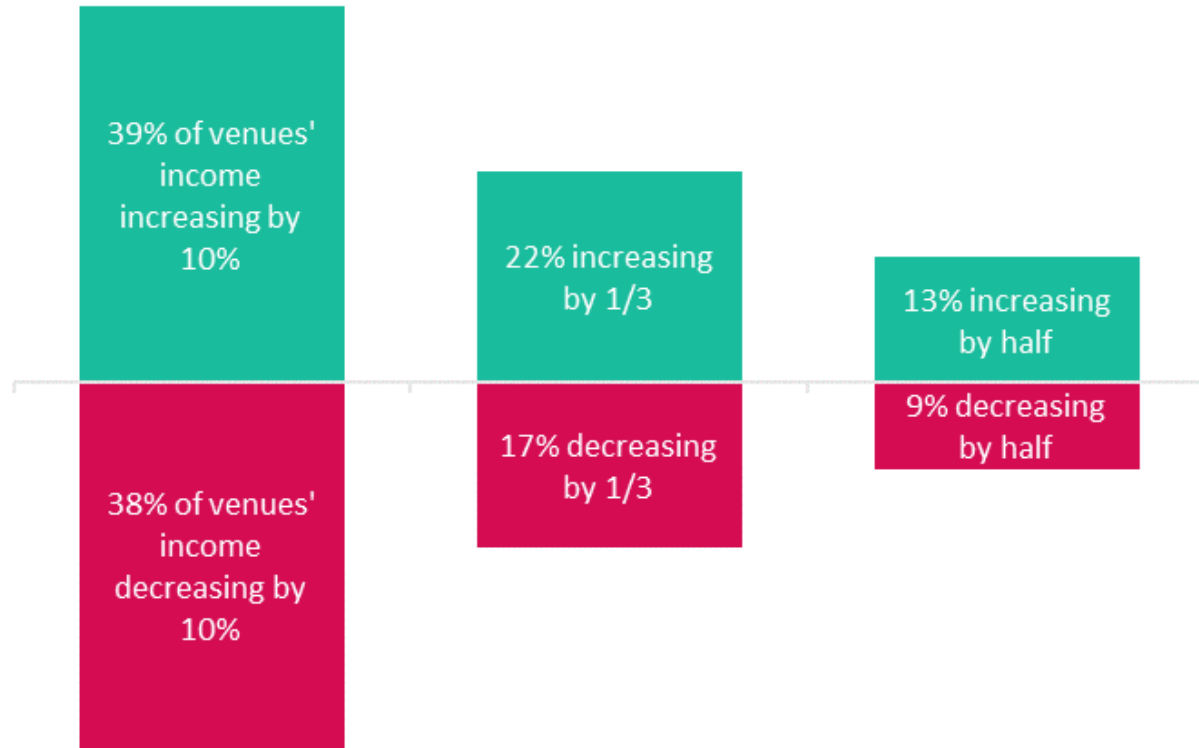
Insights from the Cultural Participation Monitor

Retirees are not expecting to be as affected by the 'cost of living crisis'



Analysis of the post-restrictions cultural recovery

Venues' income change pre-post pandemic



- On average tickets and income are essentially back to pre-pandemic levels
- This hides a lot of variation and real-term changes



Attitudes re Attending

- **Commuterland Culturebuffs** are most likely to think it's time to 'live normally' with the risks of Covid (32% cf. 26%)
- **Trips & Treats** and **Dormitory Dependables** most likely to be happy to attend (both 58% cf. 52%).
- **Home & Heritage** had higher proportions among survey respondents (i.e. heritage rather than perf. arts), but are now the most reluctant to attend.
- Younger people are more likely to have attended arts/heritage recently, as are families, the previously highly engaged, and those without disabilities.
- Scotland overall is mostly in line with national averages in terms of engagement - but more cautious about Covid.

What Are the Implications?

In Conclusion...?

- Lots of demographic contrasts within the area, despite average overall picture
- High % of Kaleidoscope Creativity and Experience Seekers: the former very under-represented
- Net ticket sales decrease in West Central 2016/17 to 2019/20
- Audiences from in family groups tend to stay level while older / lower income groups decrease.

From Discussion:

- A lot of ups and downs in terms of attendance since reopening, and throughout this past summer and autumn, which has made it hard to see patterns.

In Conclusion...?

- Most audiences stay local but a large pull towards Edinburgh, esp. in Summer.
- Big shift in non-local attendance in the summer - but boost in local attendance by non-locals in winter.
- Variation in willingness to attend (and in person and online attendance) by demographic groups (as well as by Audience Spectrum).
- Mapping highlights the areas that are likely to rise/fall as a result.

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
 - Museums (3/11)
 - Audience Finder Onboarding (24/11 & 19/01)
- TEA Breaks (09/11 re Everyday Creativity & monthly)

Thank you

Please get in touch: theaudienceagency.org
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 the audience agency