Staffordshire and Shropshire

Place Based Insights

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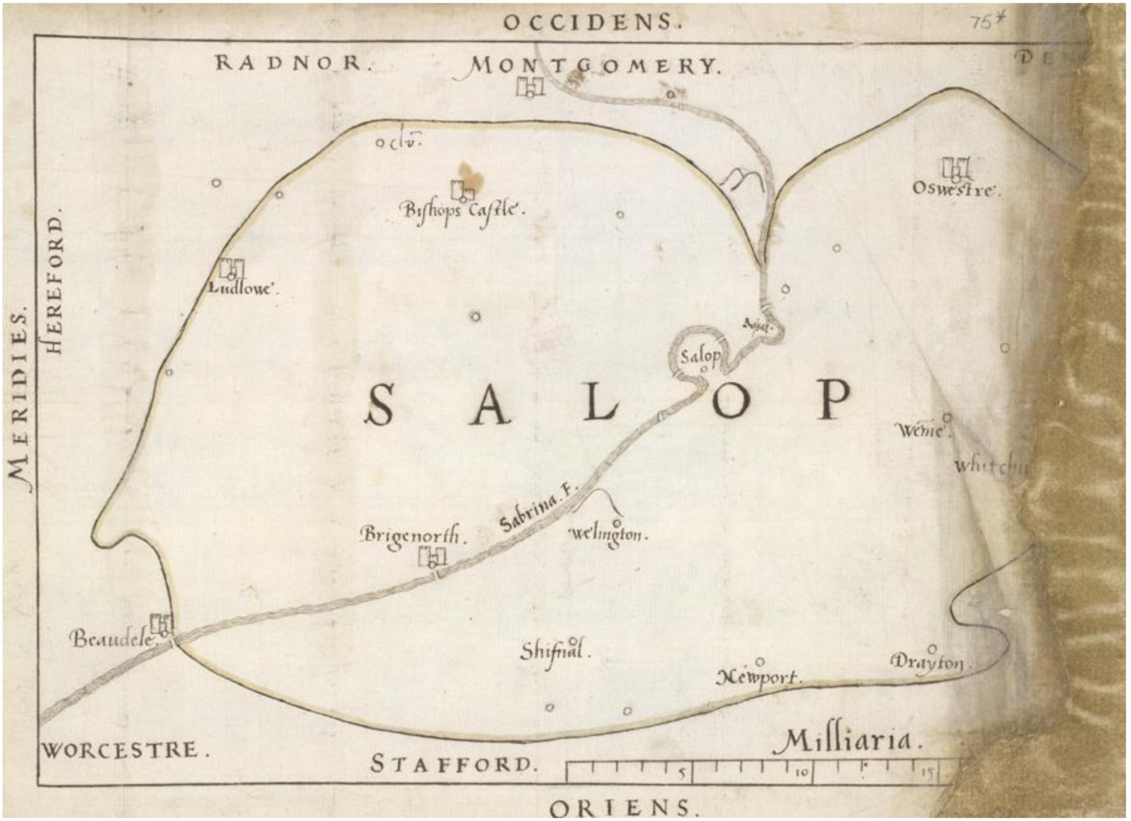
Format of the session

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



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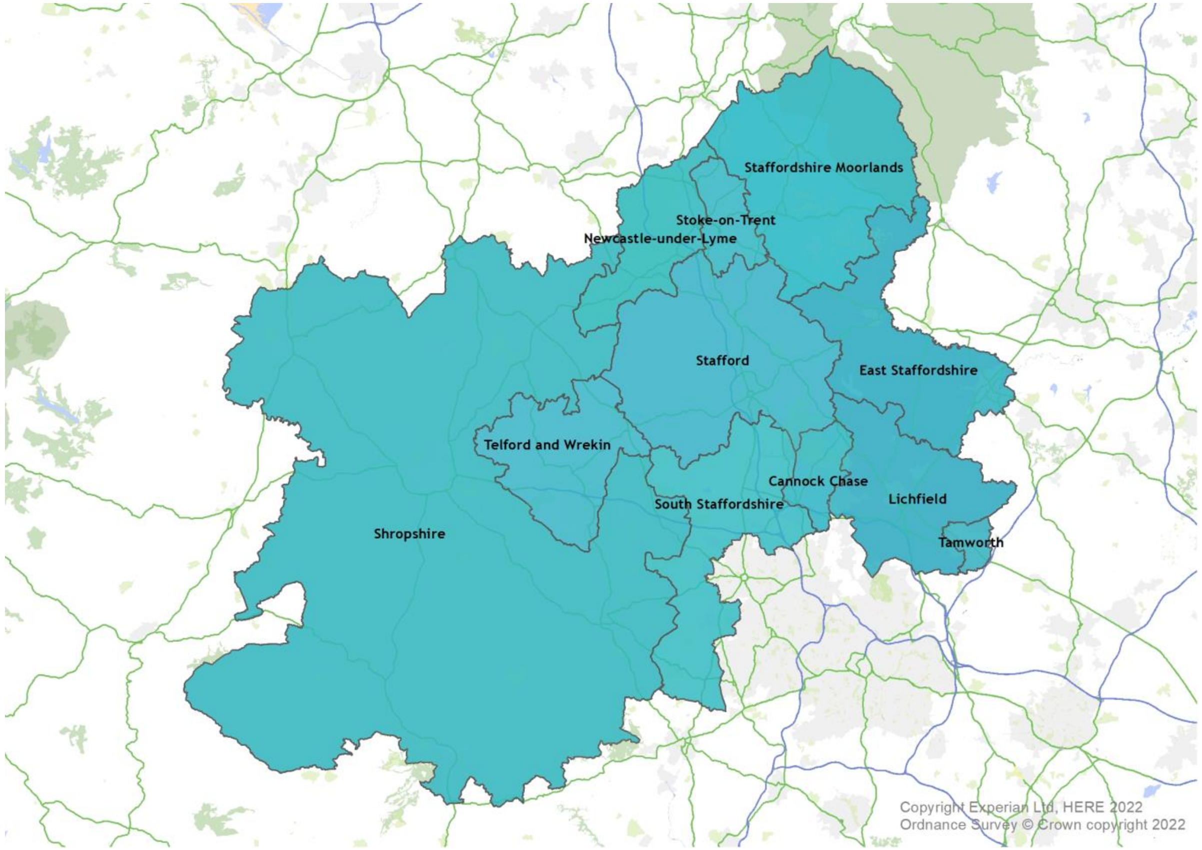
Levels of Information



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

audience spectrum

- 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

Experience Seekers

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

Experience Seekers | E1	Experience Seekers | E2
Socially minded mid-life professionals with varied tastes.	Students and graduates with adventurous attitudes in diverse urban areas.

About this Subsegment.

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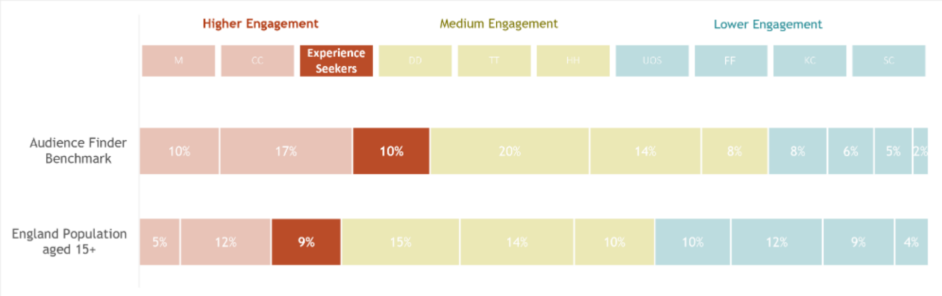


Key Statistics:

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

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.

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.

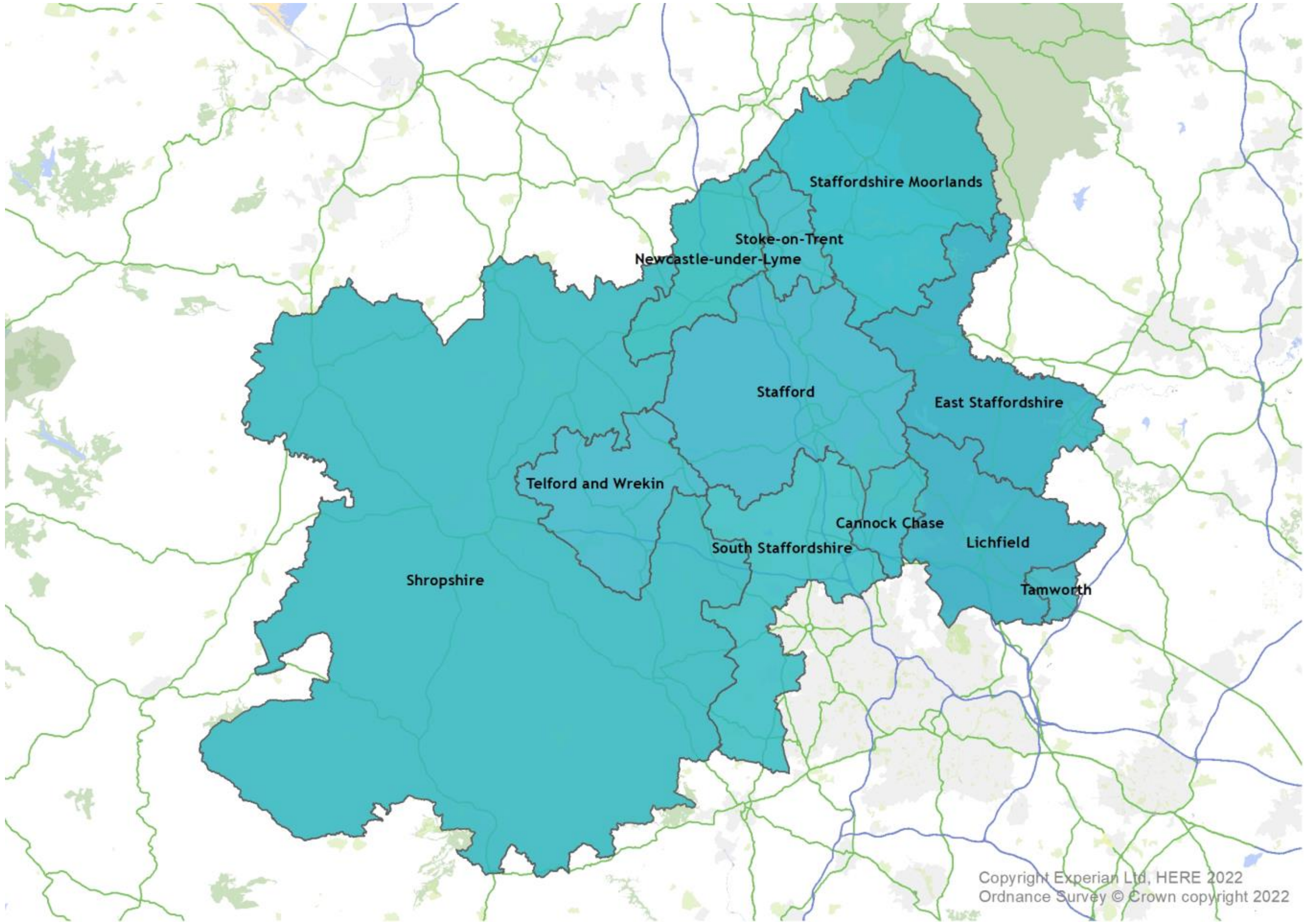
Supported Communities | S1
Young, immobile and hard-up, often relying on welfare to get by.

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

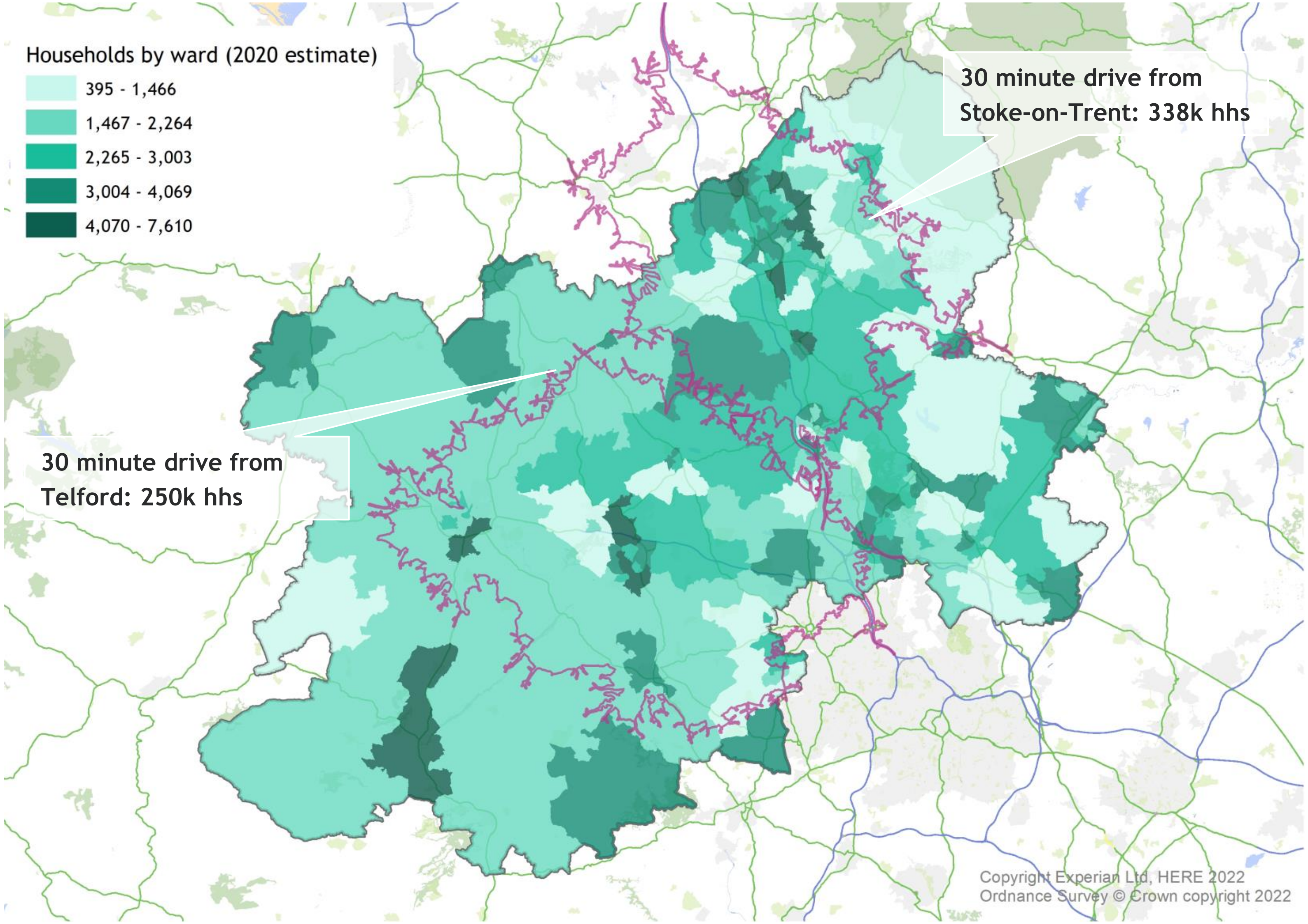
Who is the Local Population?

Local Area and Population

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



Population density by ward

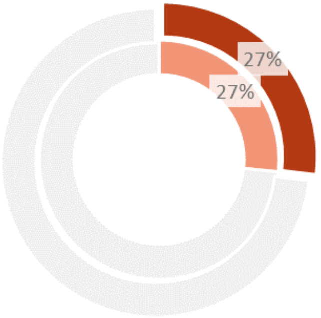


Population data – compared to rest of country

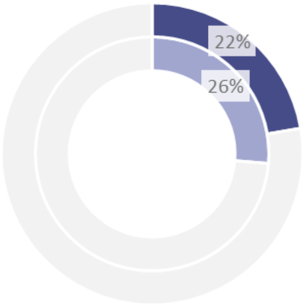
Outer ring: England

Inner ring: Staffordshire and Shropshire

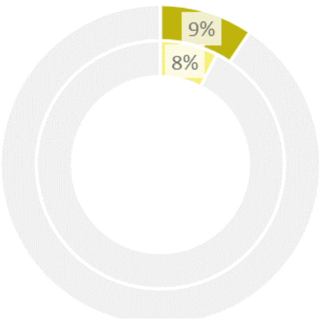
Families



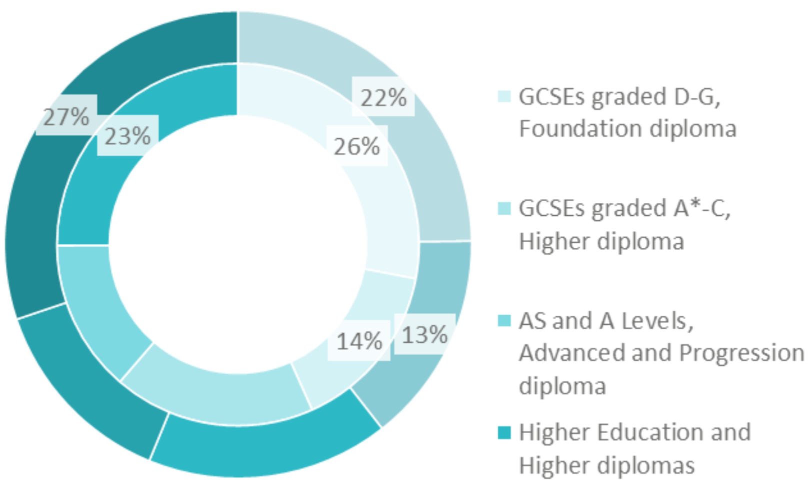
Retirees



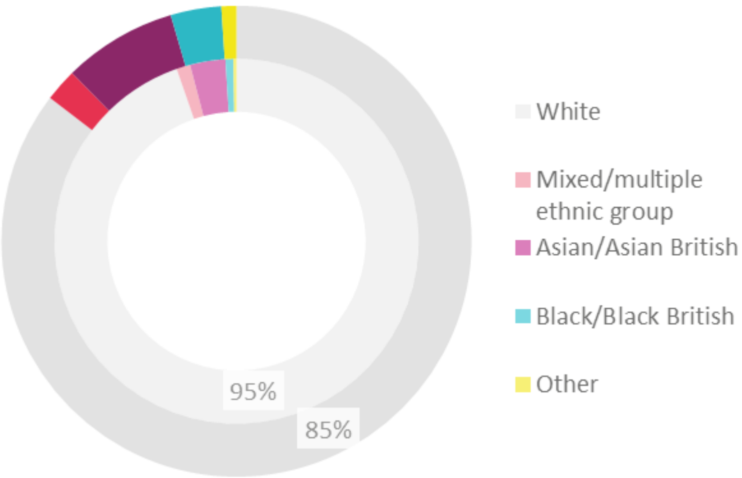
Students



Education

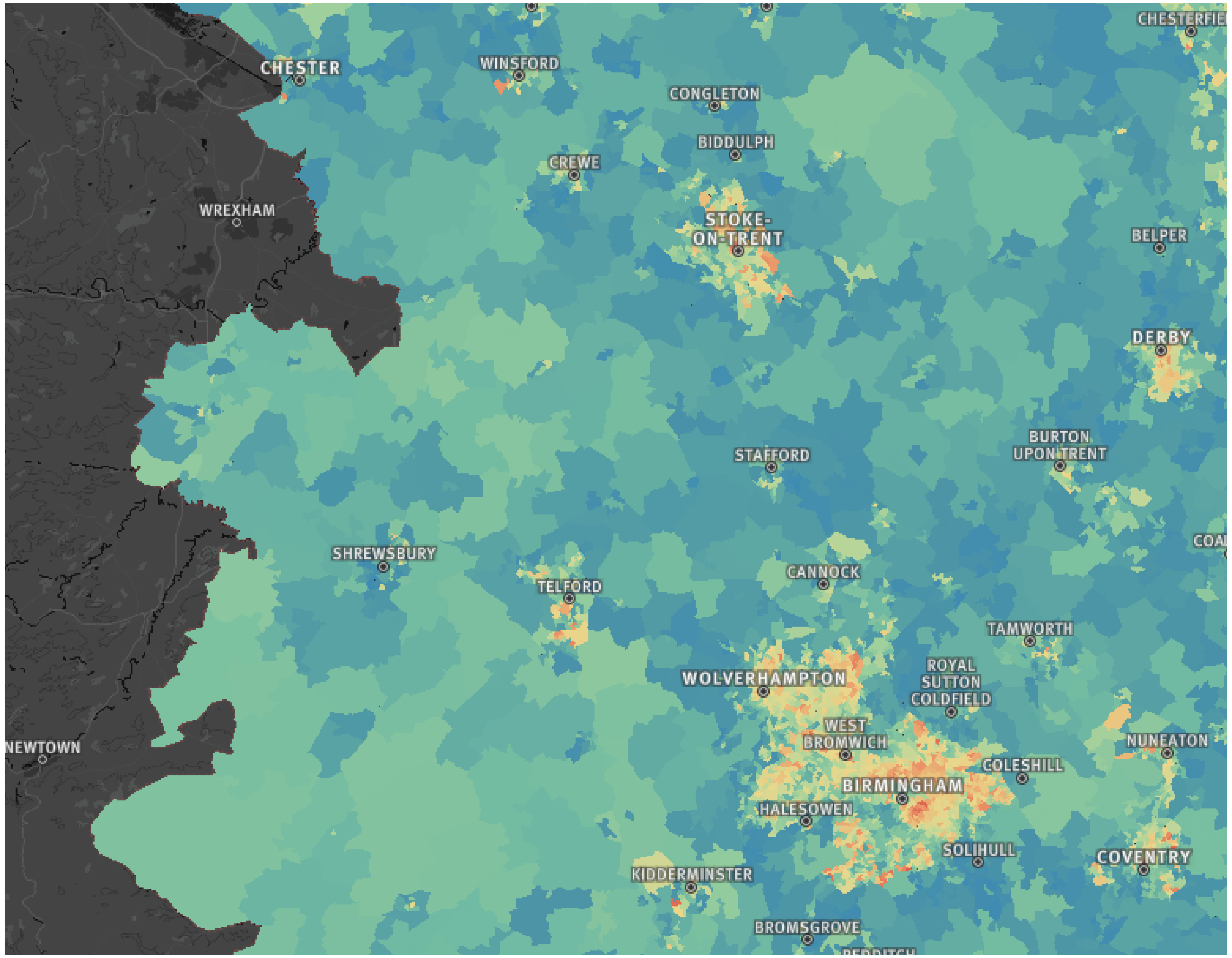


Ethnic groups



Population data – Indices of Multiple Deprivation

https://parallel.co.uk/imd



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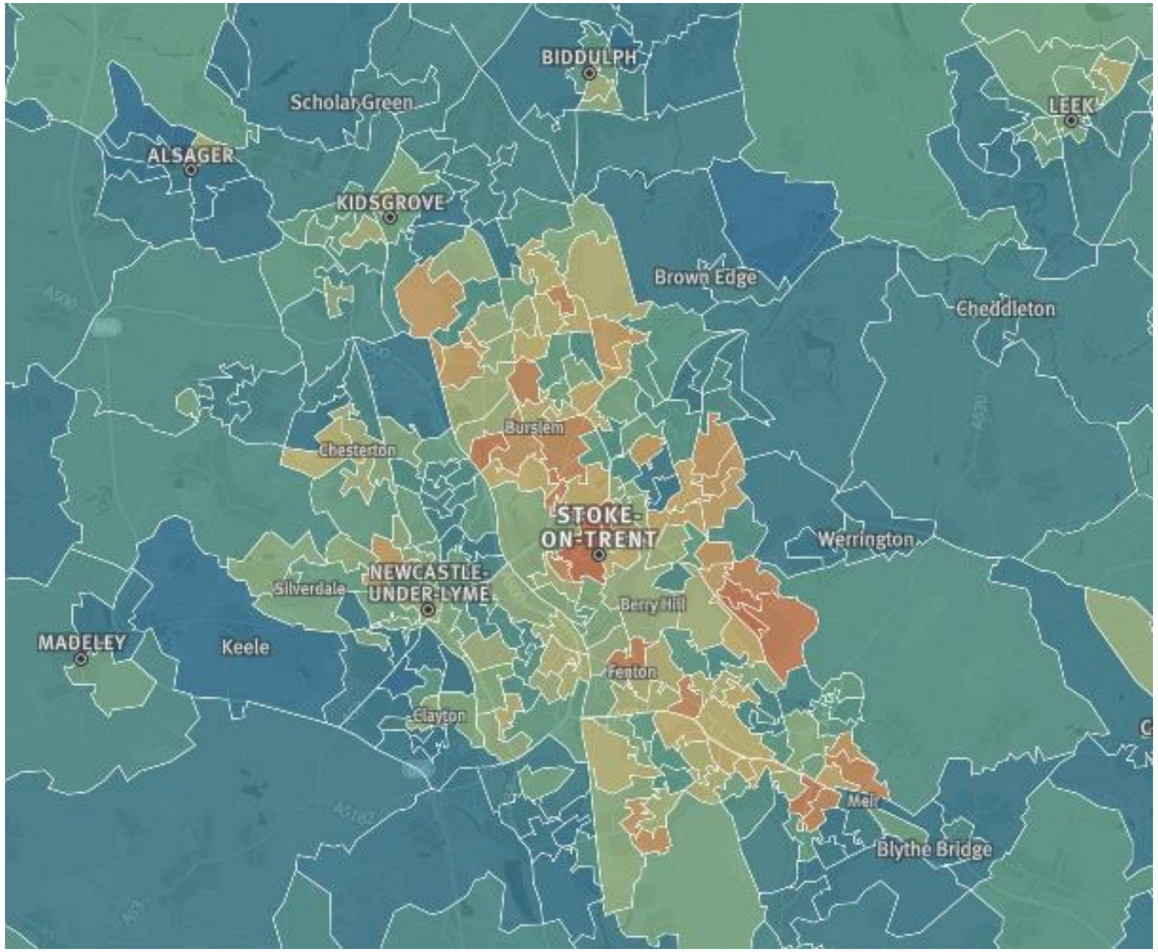

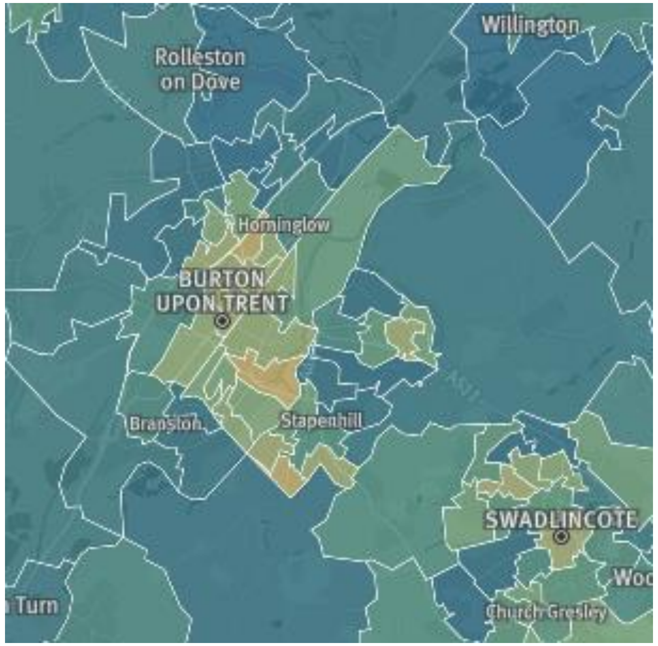

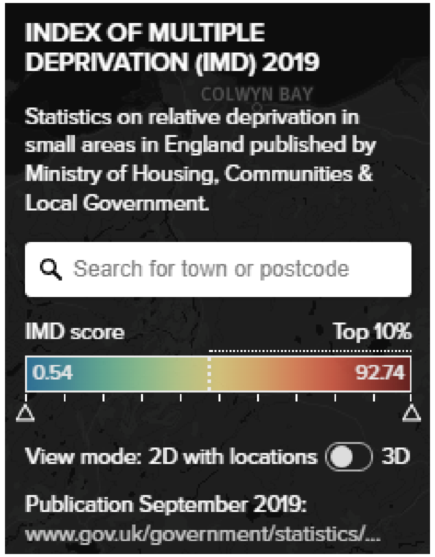

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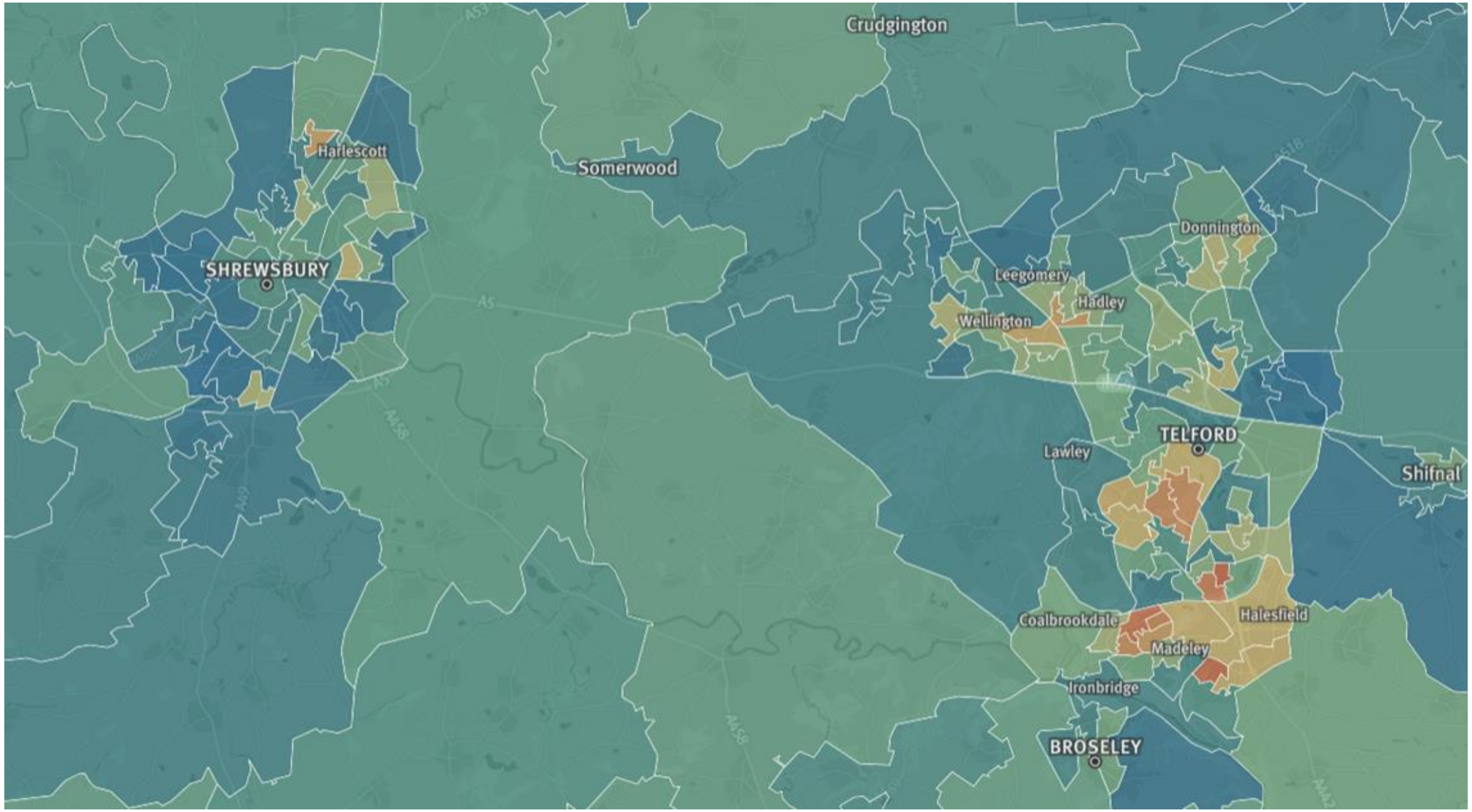
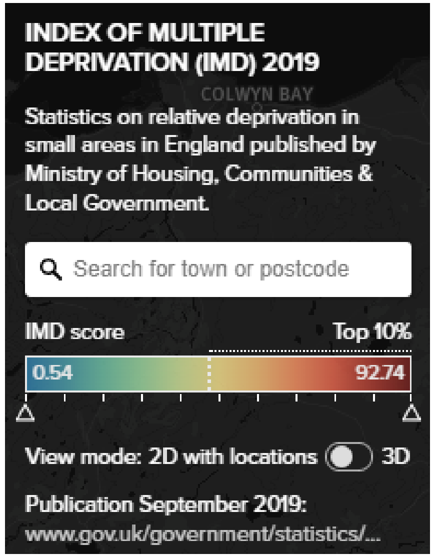
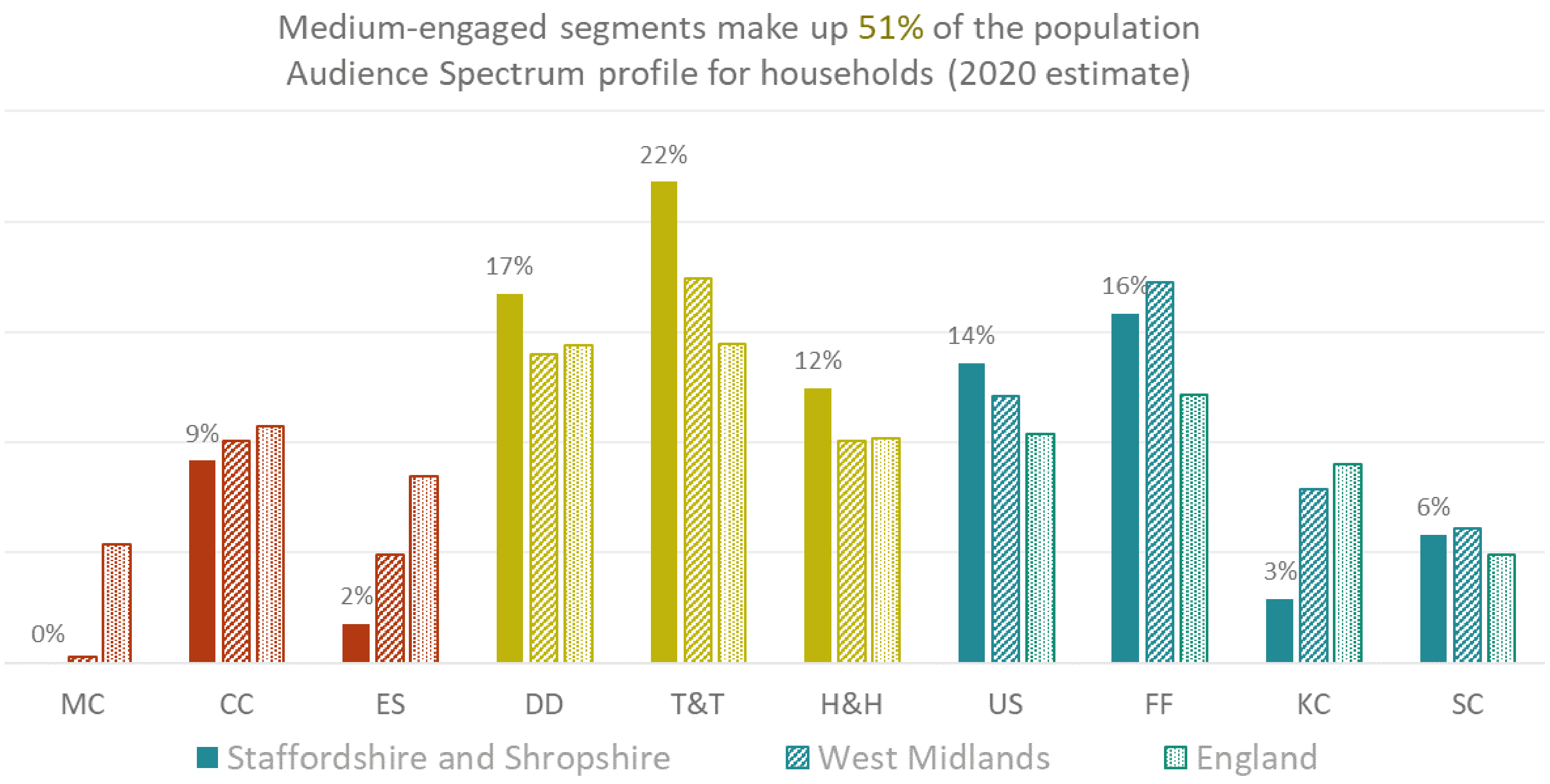
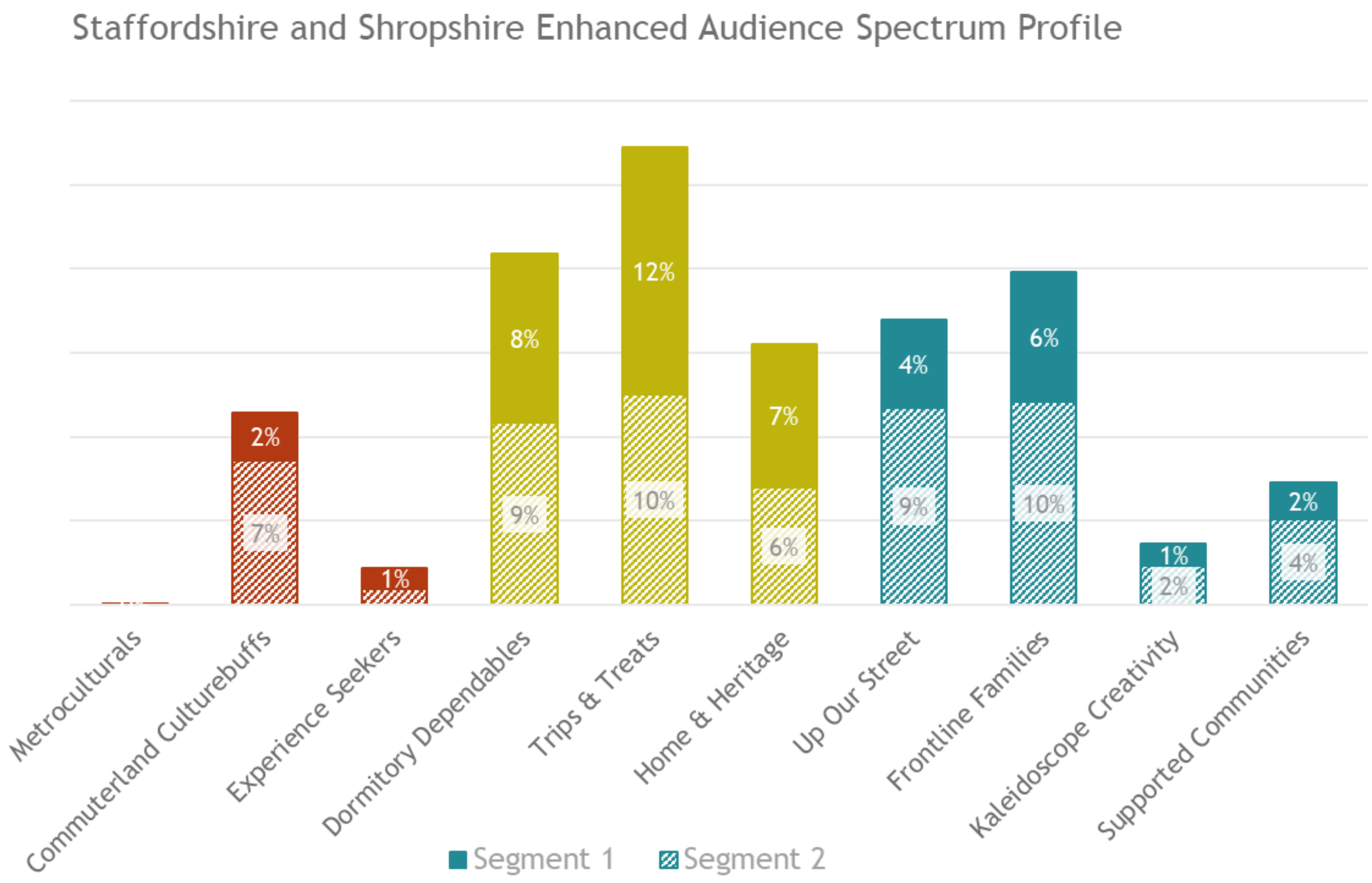




Overall Population Audience Spectrum Profile



Overall Audience Spectrum Profile: Enhanced



Trips and Treats | T1
Modern young families, building a future.
Higher attendance at children and family shows than T1, among the most likely subsegments to be attending 'to spend time with friends and family'. This subsegment tend not to spend as much as T2.

Trips and Treats | T2
Settled families with established lifestyles.
They have higher levels of engagement than T1 overall, including of mainstream performing arts events such as music, plays/drama and musical theatre. They also spend more, both overall and per ticket.

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

Commuterland Culturebuffs | C2
Wealthy empty-nesters with comfortable, rural lifestyles.

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

Population data – comparing the local areas

Shropshire: High DD and HH, retirees, self-employed.

Stoke-on-Trent: High UoS and FF, highest Asian/Asian British, high students, families.

Telford and Wrekin: High TT and SC, highest families.

Stafford: High DD and TT, professional occupations.

Newcastle-under-Lyme: Quite high UoS and FF, highest students.

East Staffordshire: Quite high FF, Asian/Asian British.

705k total:

141k Shropshire

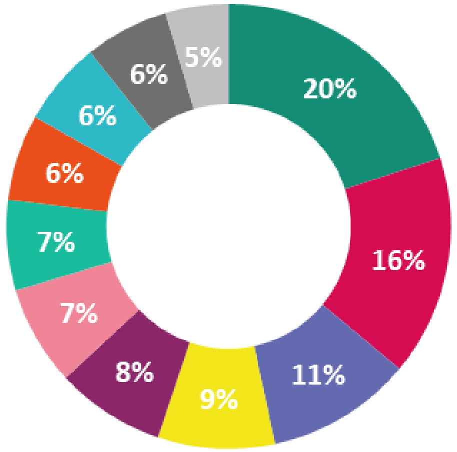
113k Stoke-on-Trent

75k Telford and Wrekin

60k Stafford

43k Newcastle-under-Lyme

51k East Staffordshire



Population data – comparing the local areas

South Staffordshire: High CC, DD, retirees.

Lichfield: High DD, TT, professional occupations, retirees.

Cannock Chase: High TT and FF.

Staffordshire Moorlands : High DD, HH, highest retirees, high skilled trades occupations.

Tamworth: Very high TT, high FF, families.

705k total:

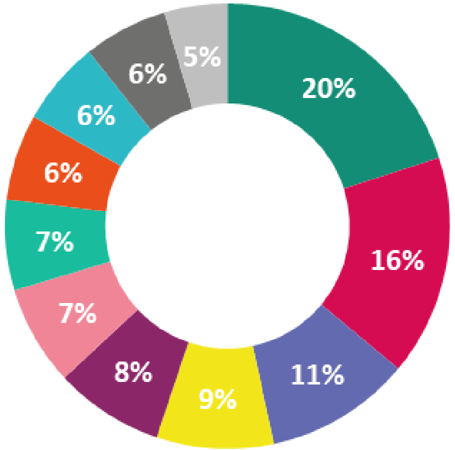
46k South Staffordshire

44k Lichfield

43k Cannock Chase

43k Staffordshire Moorlands

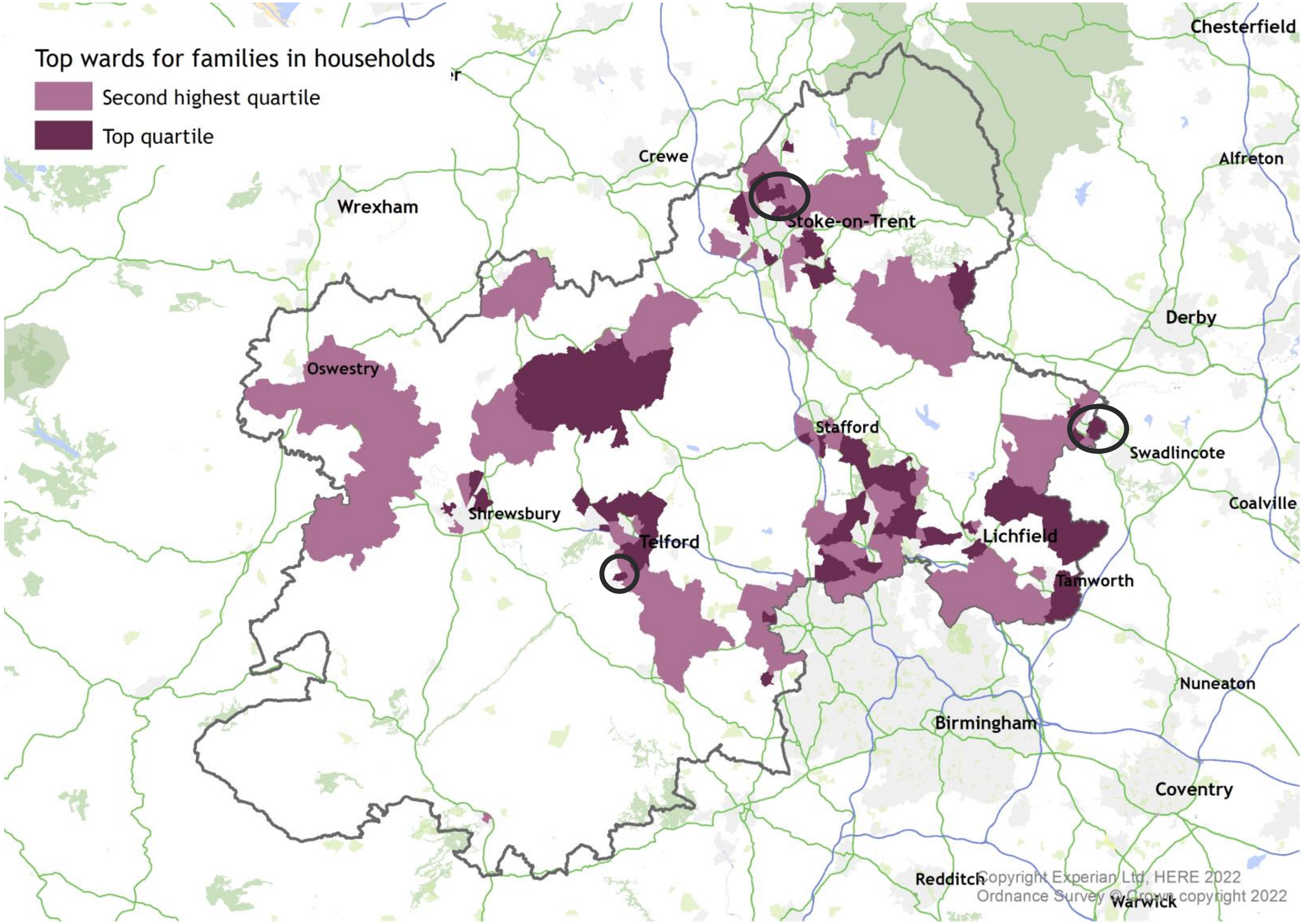
32k Tamworth



Where do family groups live?

Top wards:

1. Woodside (South Telford)
2. Anglesey (Burton)
3. Moorcroft (North Stoke)



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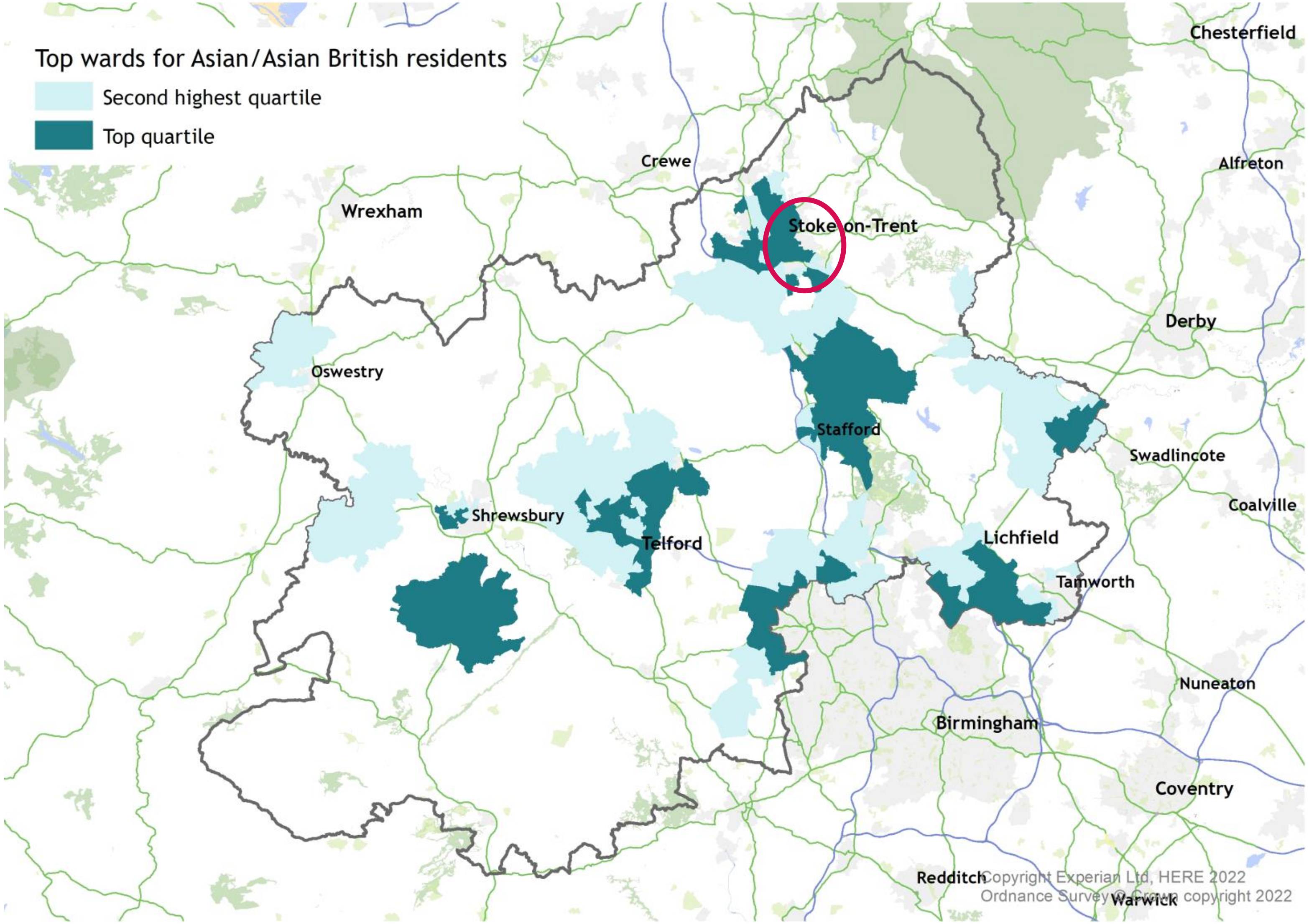
Where do Asian/Asian British residents live?

Top wards:

1. Hanley Park and Shelton (North Stoke)
2. Lightwood North and Normacot (South Stoke)
3. Moorcroft (North Stoke)



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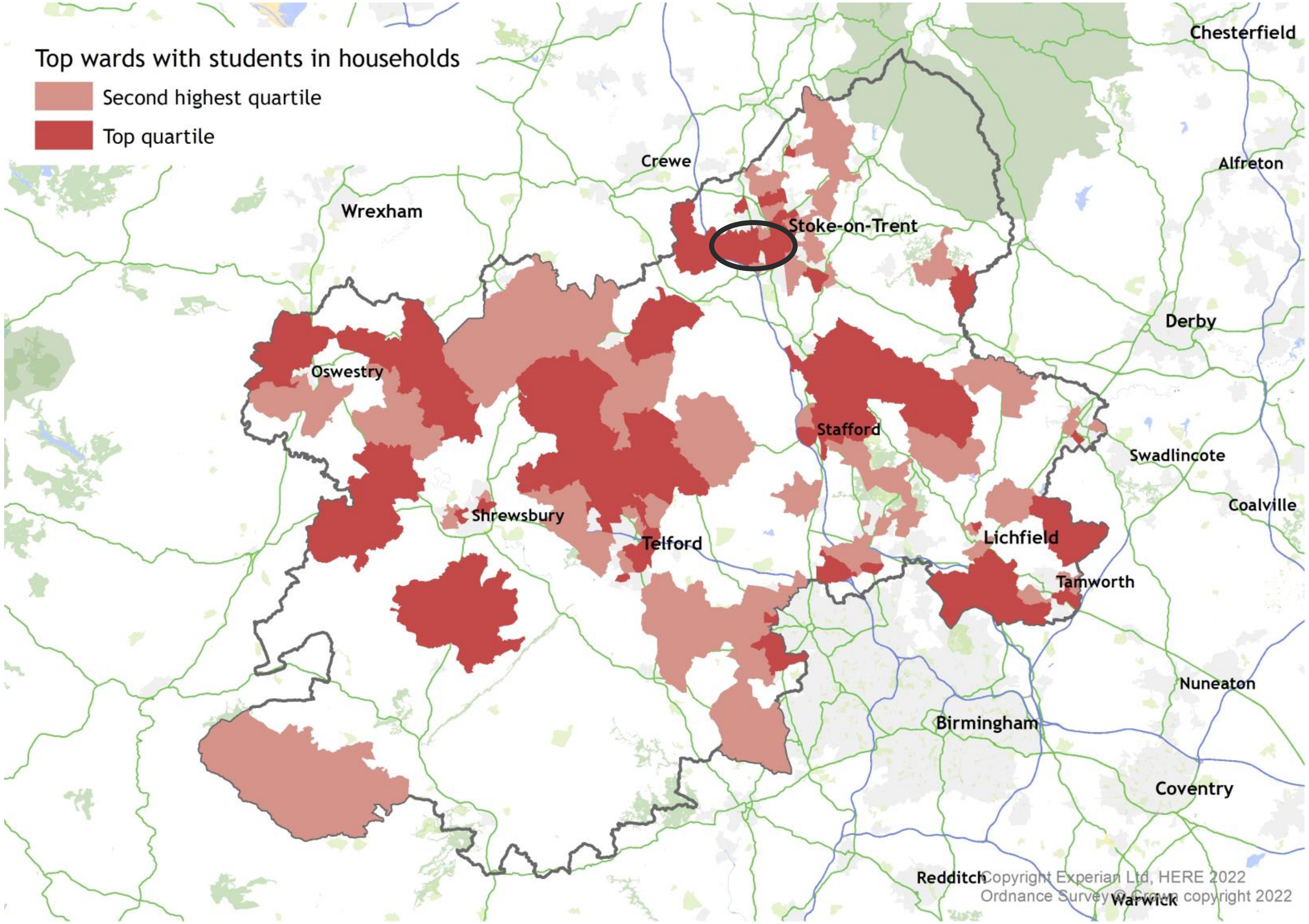
Where do students live?

Top wards:

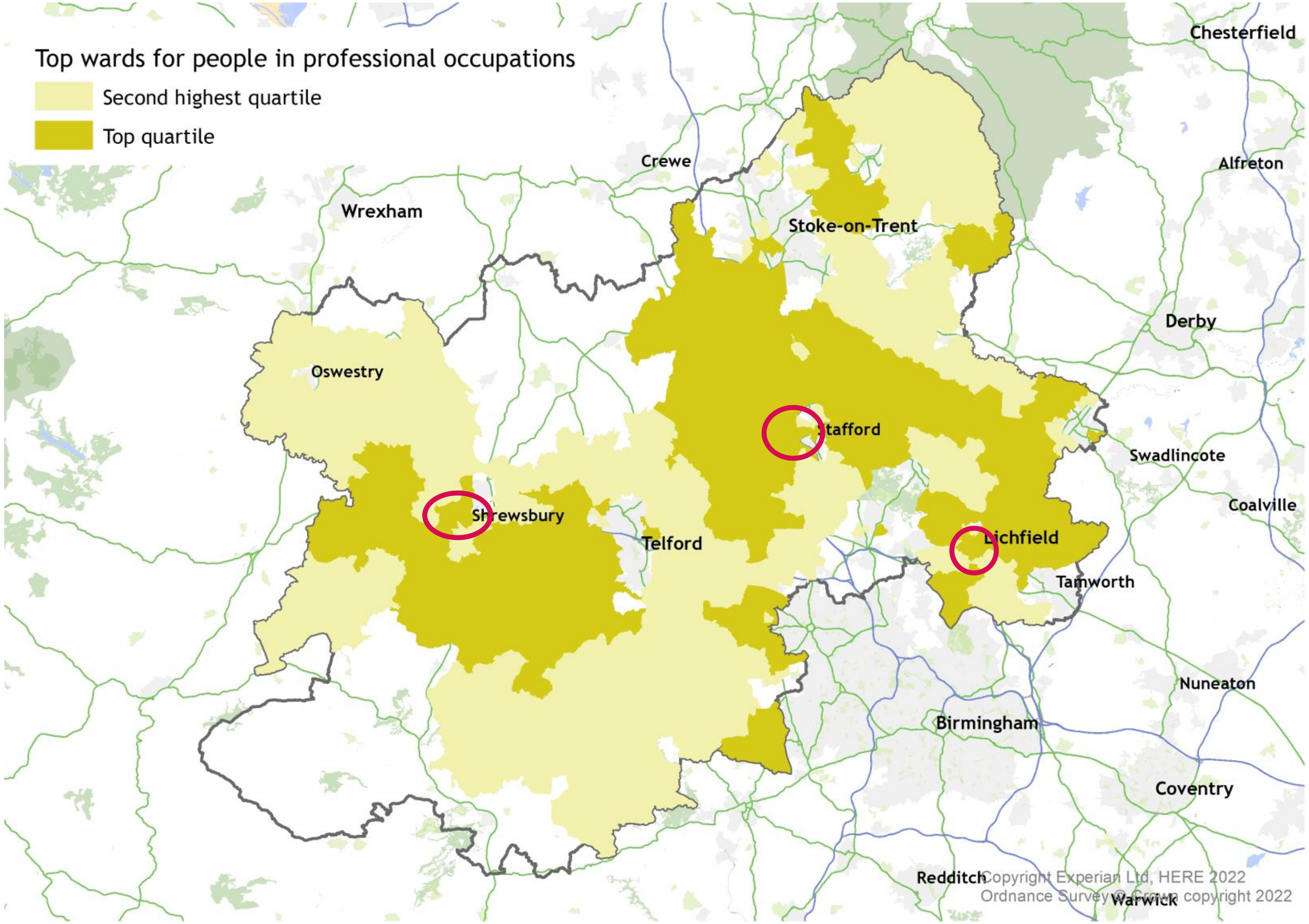
1. Keele (Newcastle)
2. Hanley Park and Shelton (Stoke)
3. Town (Newcastle)



Where do those in professional occupations live?

Top wards:

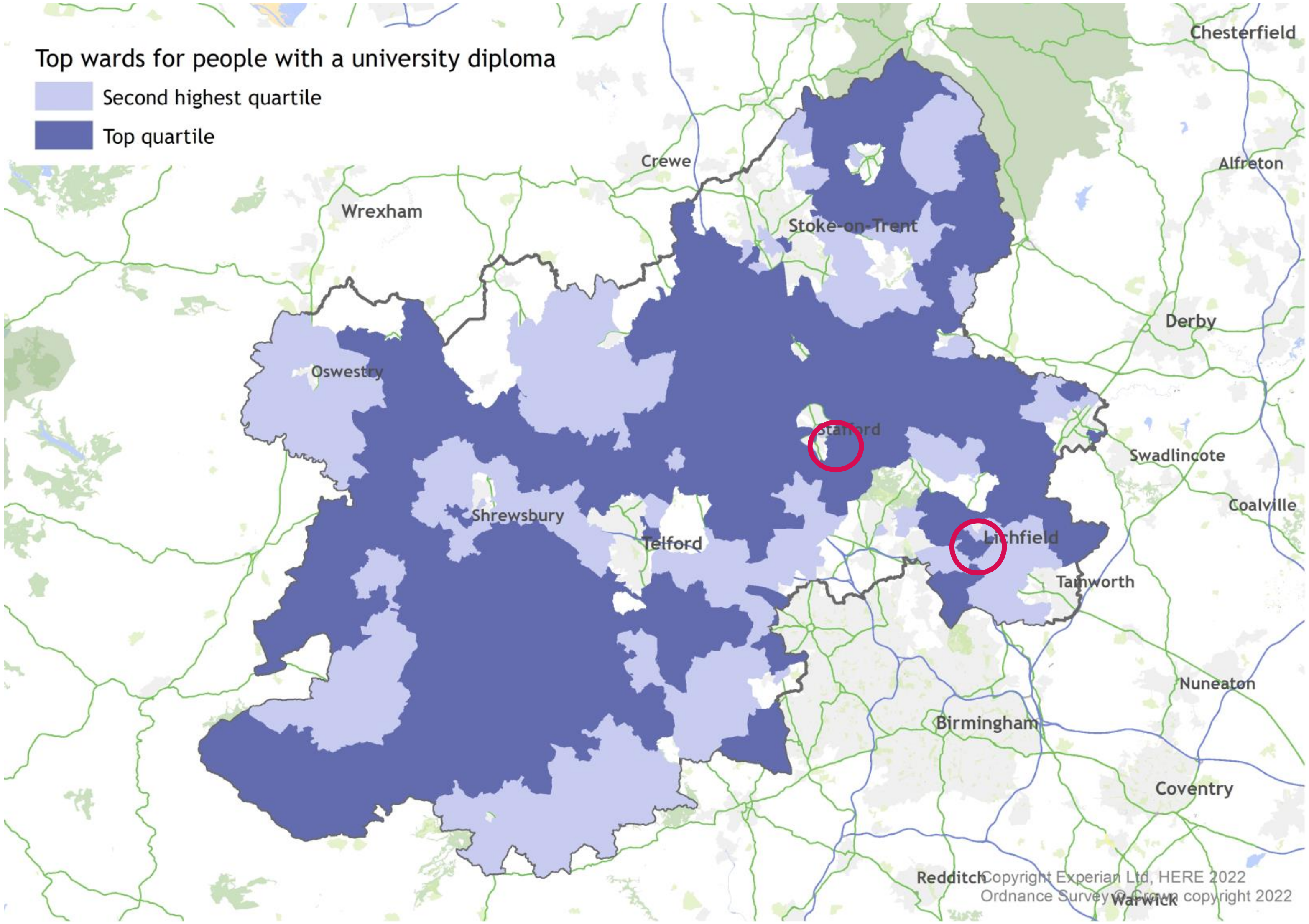
1. Rowley (West Stafford)
2. Porthill (Shrewsbury)
3. St John's (Lichfield)



Where do university educated groups live?

Top wards:

1. St John's (Lichfield)
2. Milford (South Stafford)
3. Boley Park (Lichfield)



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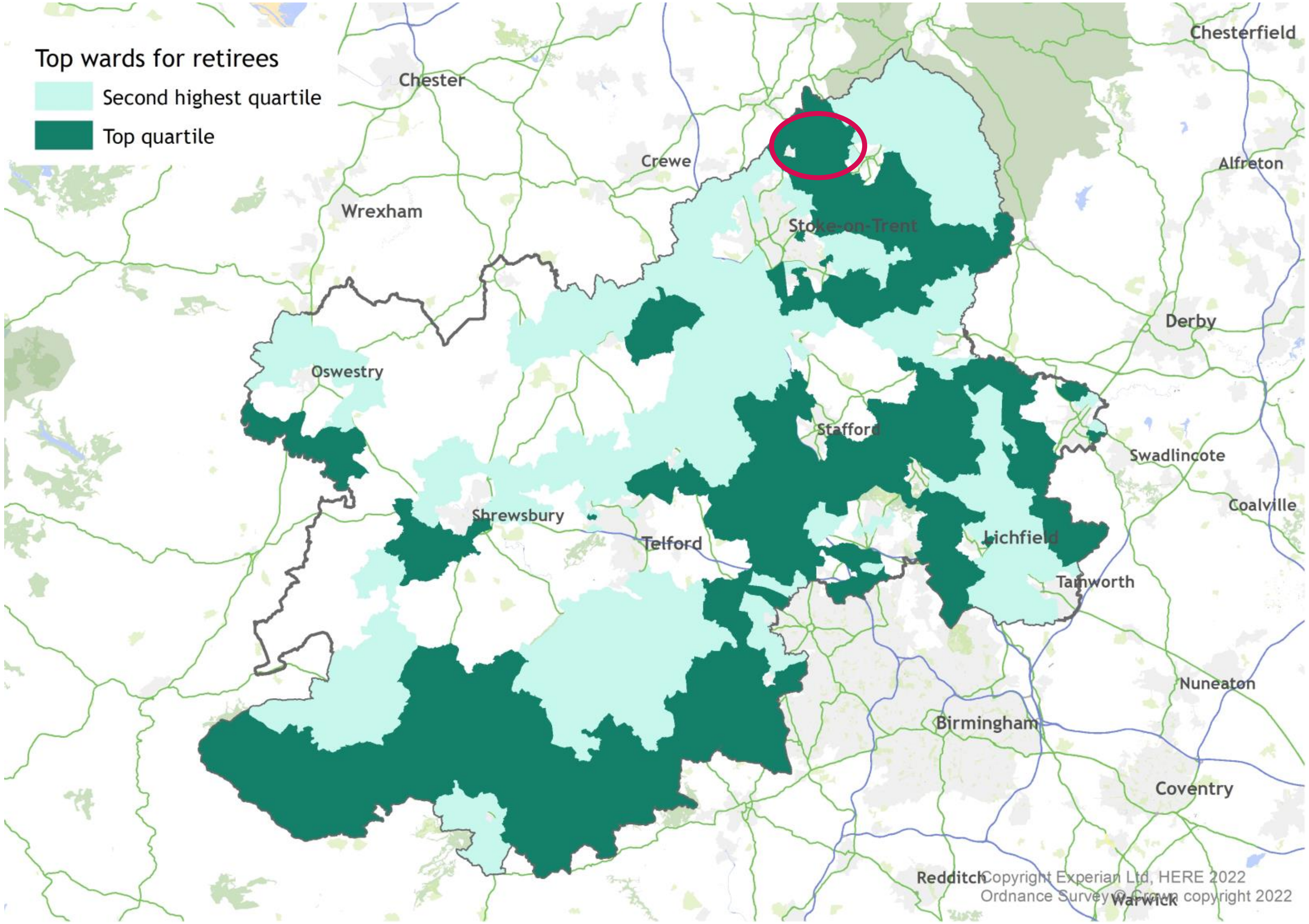
Where do retirees live?

Top wards:

1. Biddulph South (Moorlands)
2. Biddulph North (Moorlands)
3. Bagnall and Stanley (Moorlands)



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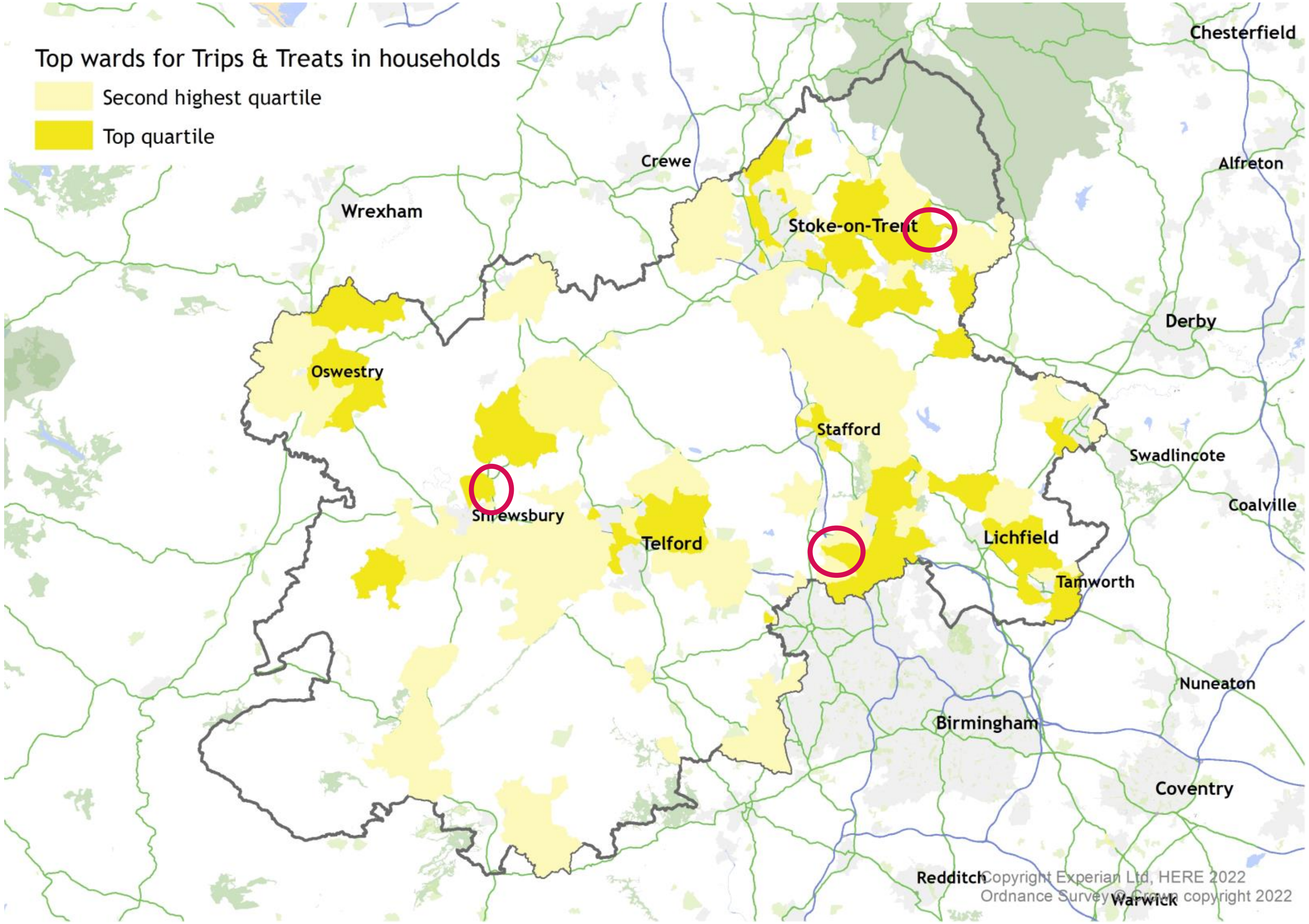
Where do Trips & Treats live?

Top wards:

1. Meir Hay (East Stoke)
2. Cheslyn Hay North and Saredon (South Staffs)
3. Battlefield (North Shrewsbury)



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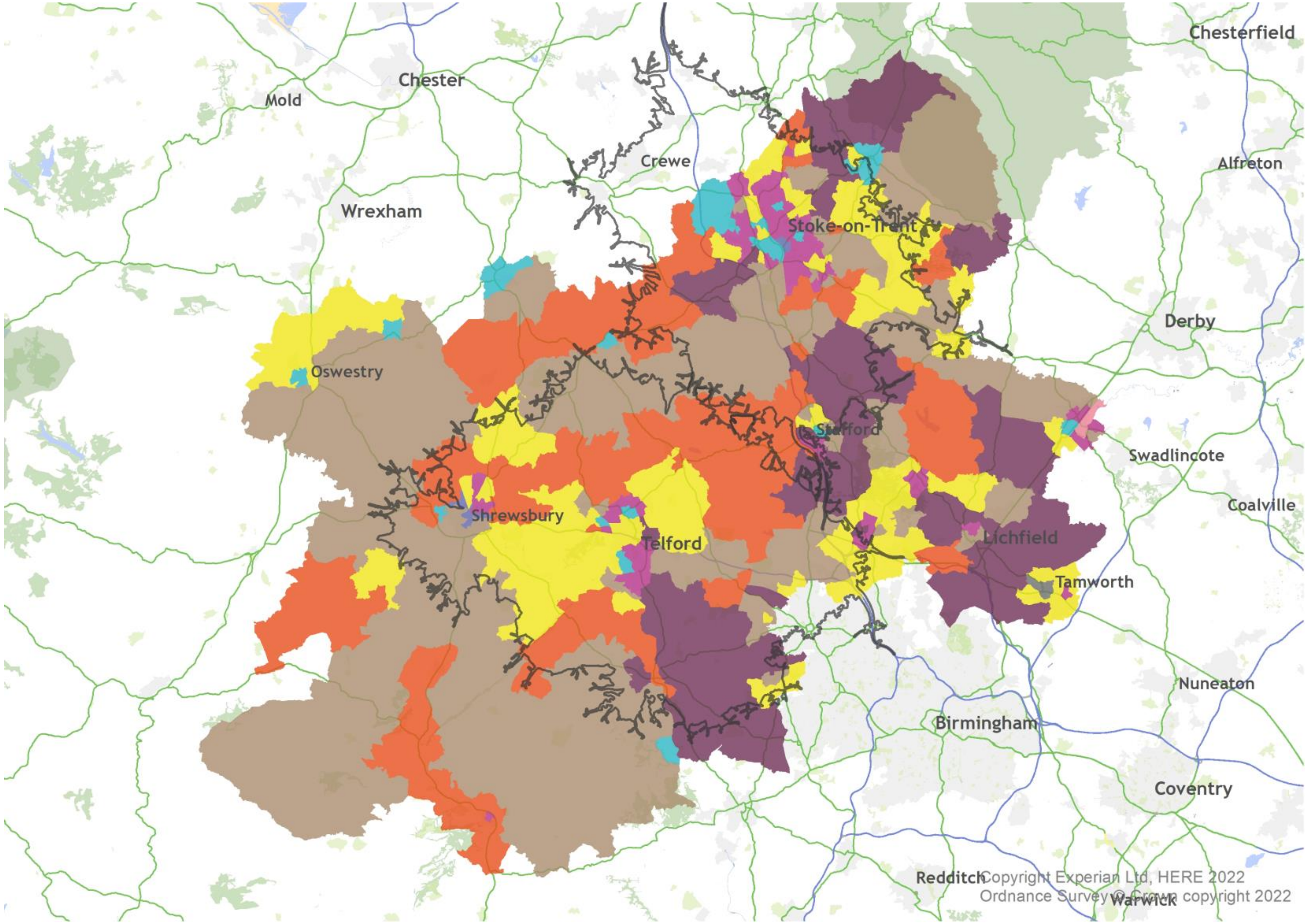
Dominant Audience Spectrum Segment by Ward - Population

Dominant segment in households

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



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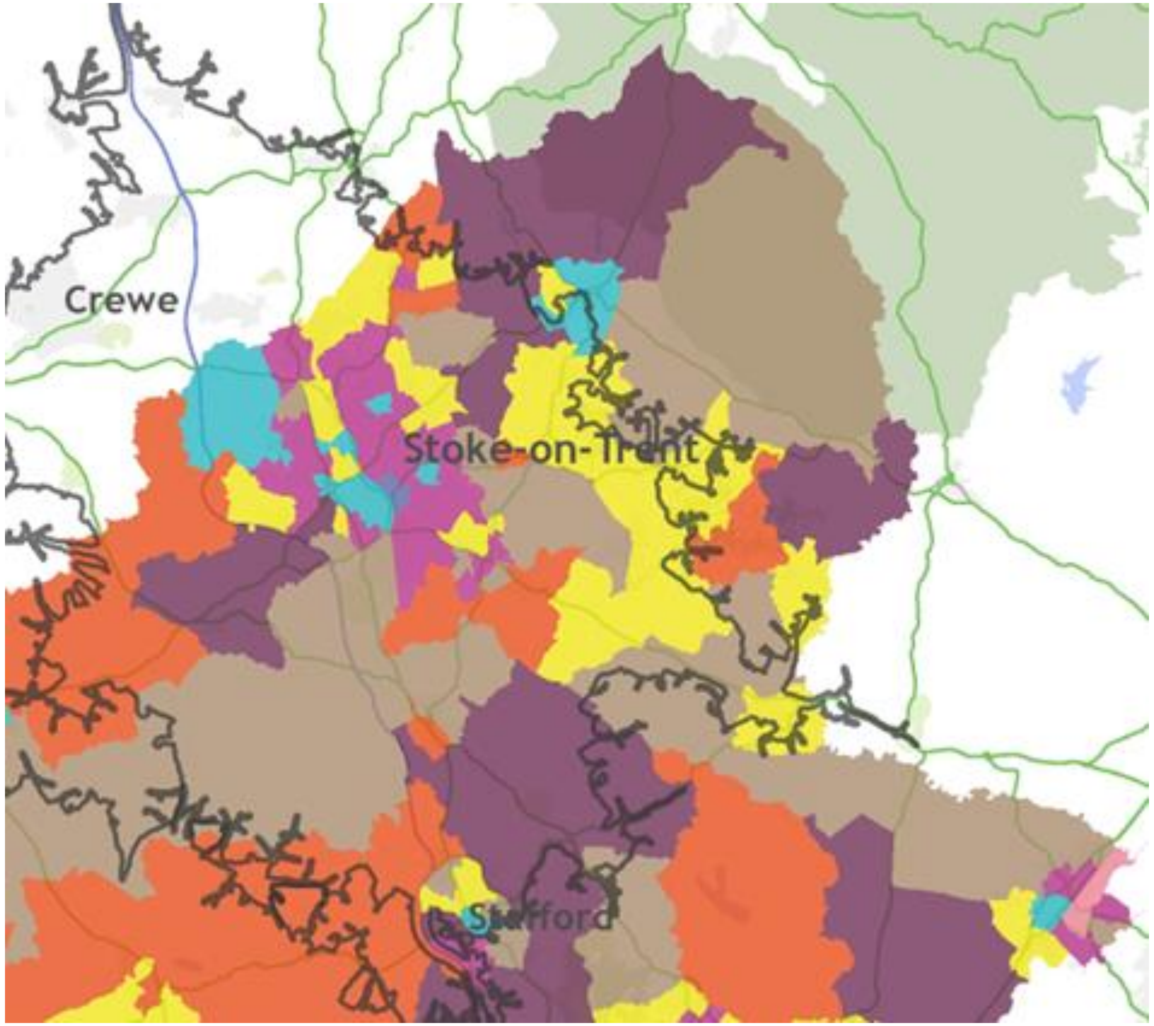

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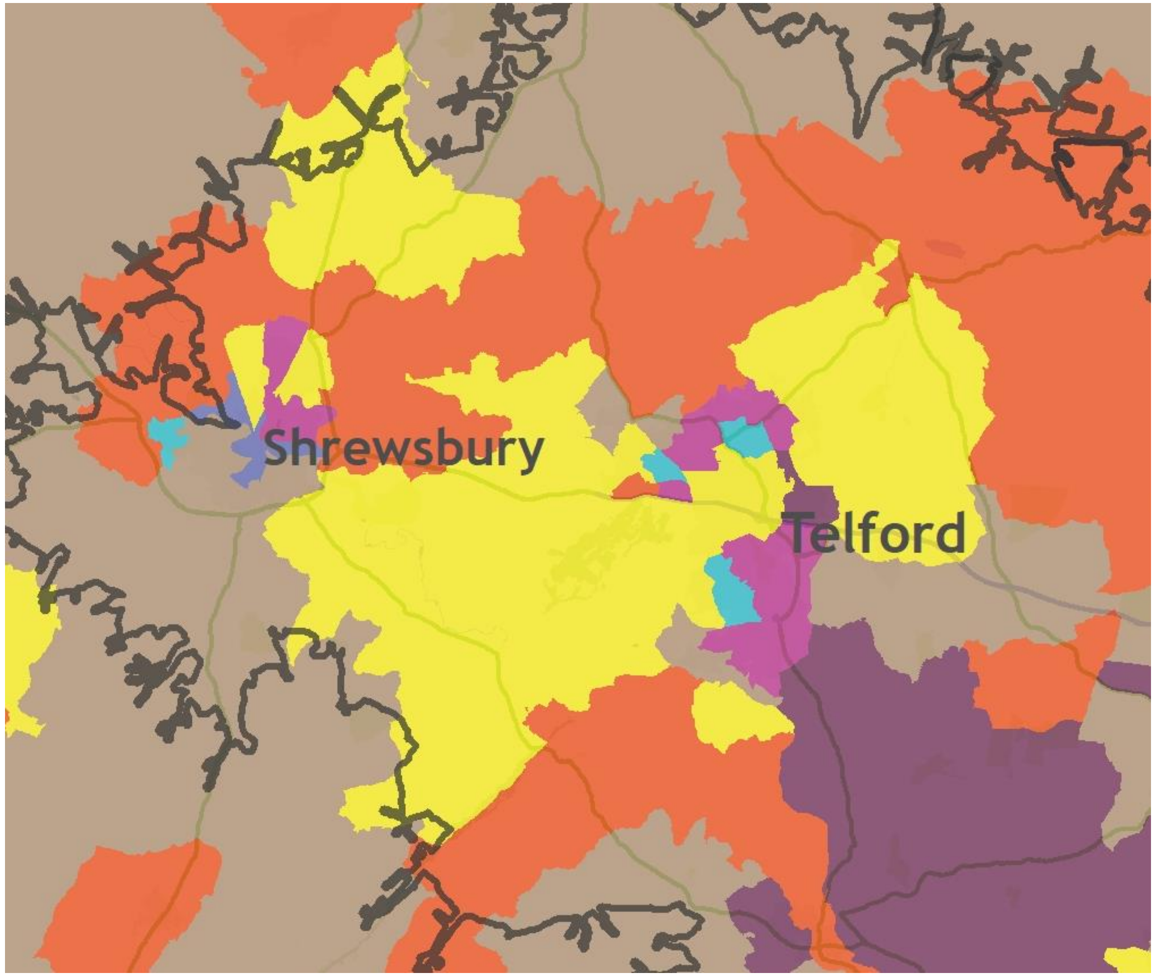


Wards with Highest % by Audience Spectrum

Segment	Highest	Second Highest	Third Highest
Metroculturals	Quarry and Coton Hill (4%)	Stowe (1%)	Belle Vue (1%)
Commuterland Culturebuffs	Boley Park (66%)	Little Aston & Stonnall (65%)	Shenstone (58%)
Experience Seekers	Hanley Park and Shelton (67%)	Quarry and Coton Hill (51%)	Town (30%)
Dormitory Dependables	Perton Dippons (64%)	Werrington (57%)	Baswich (57%)
Trips & Treats	Meir Hay (71%)	Cheslyn Hay North and Saredon (61%)	Battlefield (59%)
Home & Heritage	Biddulph South (57%)	Chirbury and Worthen (44%)	Wheaton Aston, Bishopswood and Lapley (42%)
Up Our Street	Shobnall (43%)	Boothen and Oak Hill (42%)	Penkhull and Stoke (42%)
Frontline Families	Anglesey (69%)	Tunstall (64%)	Woodside (63%)
Kaleidoscope Creativity	Burton (35%)	Bentilee and Ubberley (28%)	Blurton West and Newstead (22%)
Supported Communities	Donnington (31%)	Malinslee & Dawley Bank (30%)	Woodside (23%)

Who is the Local Audience?

About Local Audiences

Audience Finder ticketing:

Local **Venues** Included:

Lichfield Garrick

New Vic Theatre, Newcastle

Stafford Gatehouse Theatre

Tamworth Assembly Rooms

The Place Telford

Wem Town Hall

Staffordshire and Shropshire

	16-17	19-20	Change
Bookers	101,530	106,218	+4%
Bookings	212,496	223,541	+5%
Tickets	590,340	596,477	+1%
Income	£13,293,349	£13,807,868	+4%

West Midlands

	16-17	19-20	Change
Bookers	425,550	421,178	+1%
Bookings	992,461	960,883	+1%
Tickets	2,583,055	2,430,527	0%
Income	£58,956,553	£57,386,450	+5%

Profile of Local Audiences

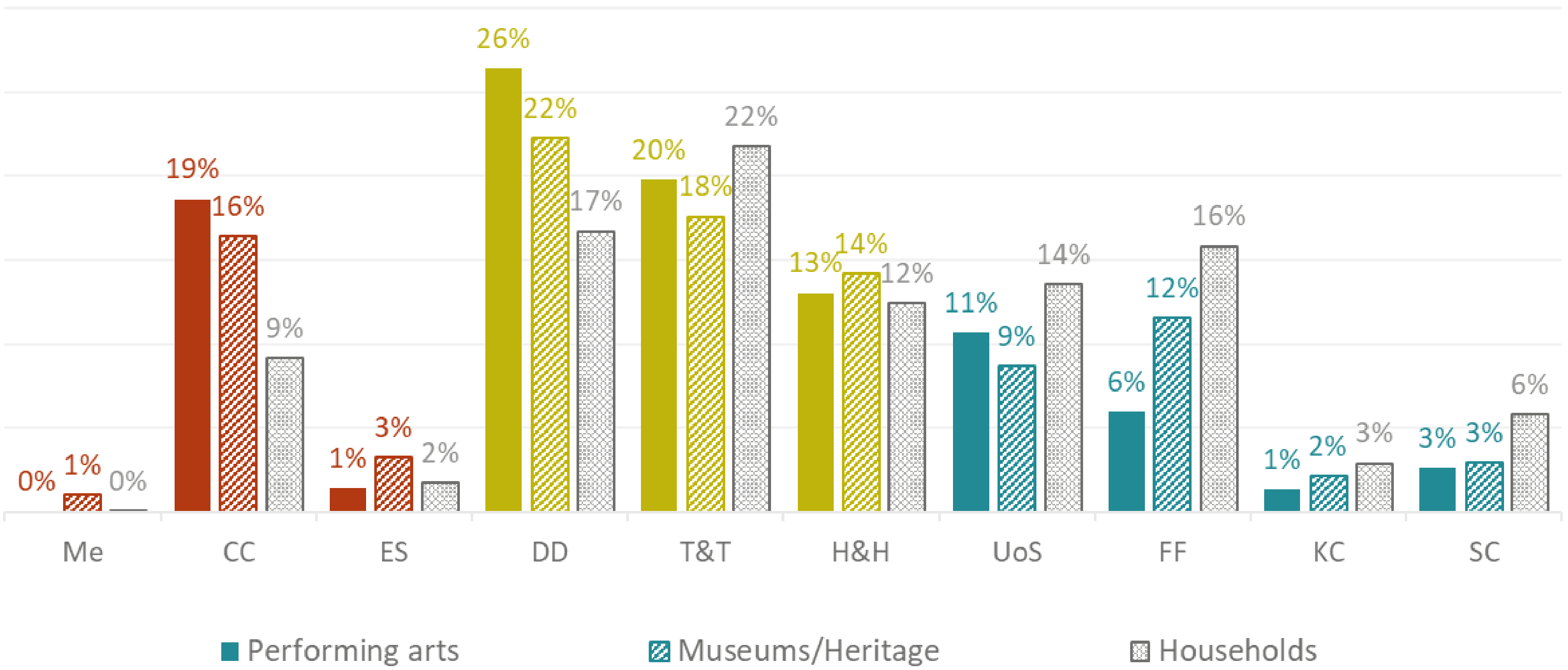
Key differences by artform:

Commuterland Culturebuffs:
27% Contemp. Visual Arts
28% Outdoor Arts

Dormitory Dependables:
34% Children/Family shows

Trips & Treats:
24% Children/Family show
26% Museums Heritage in ticketing data

Frontline Families are most underrepresented in Performing Arts bookers, Dormitory Dependables is the top segment



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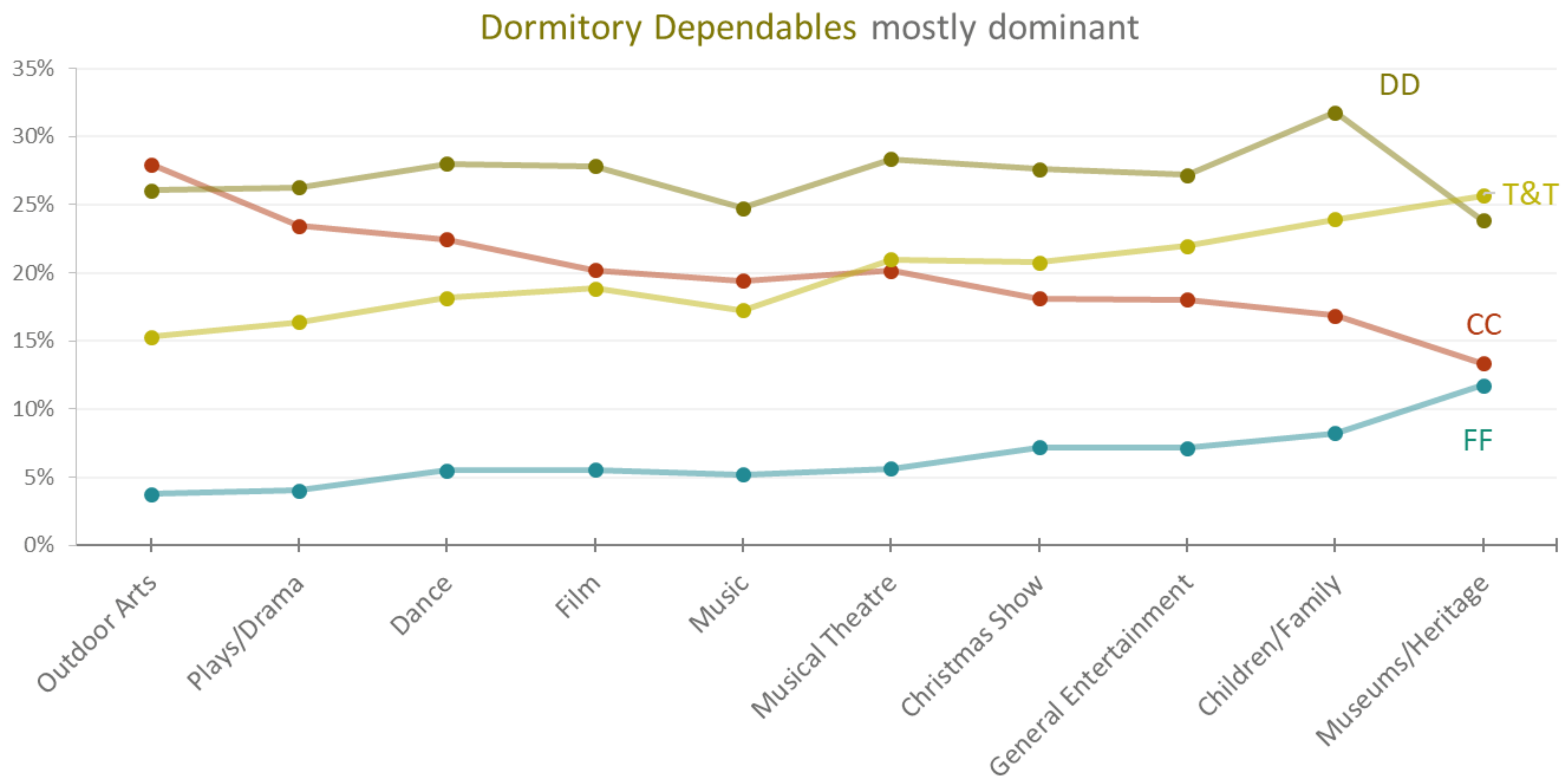
Profile of Local Audiences



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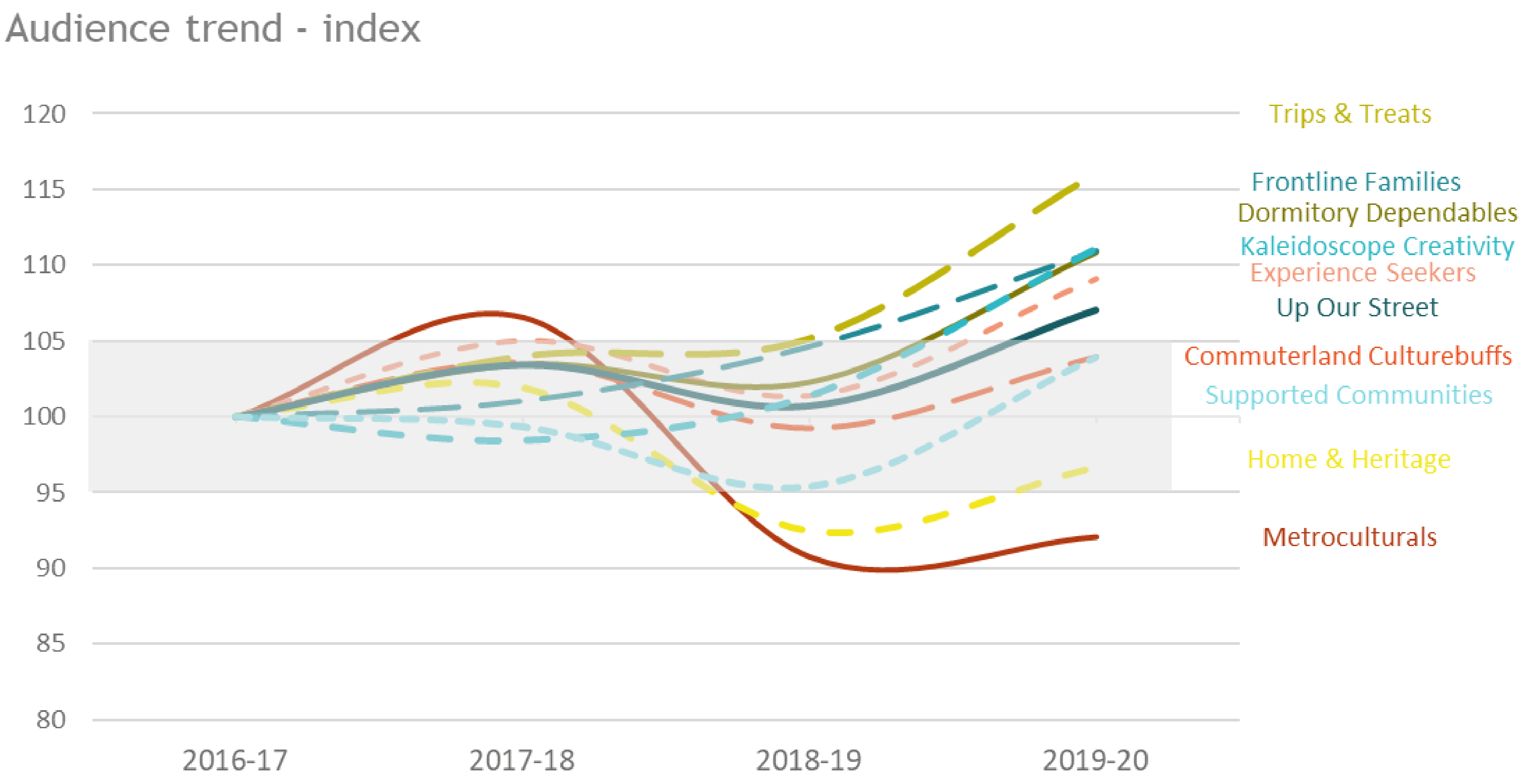
Audience Trends

Families Lower/Middle Income

Older groups



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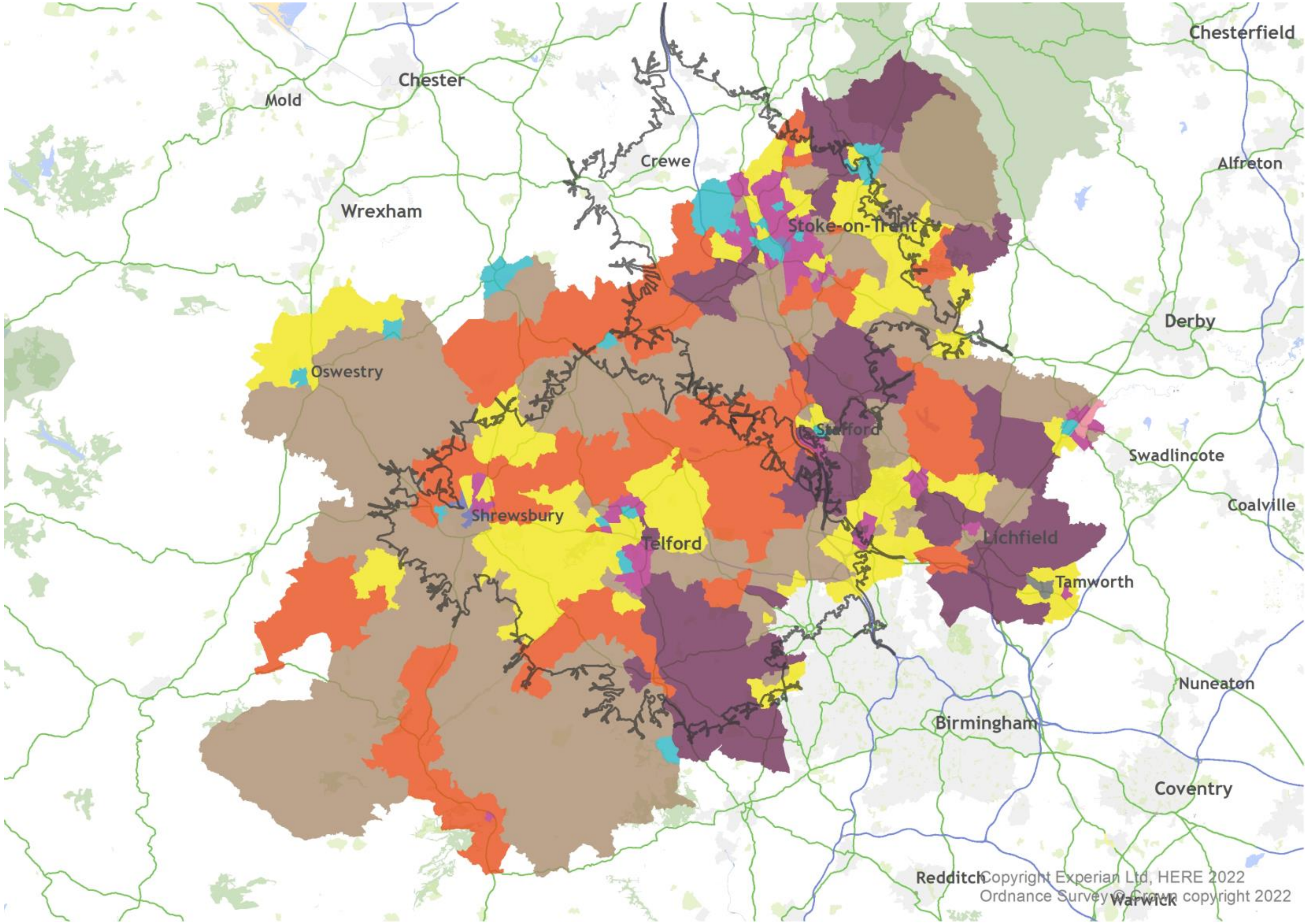

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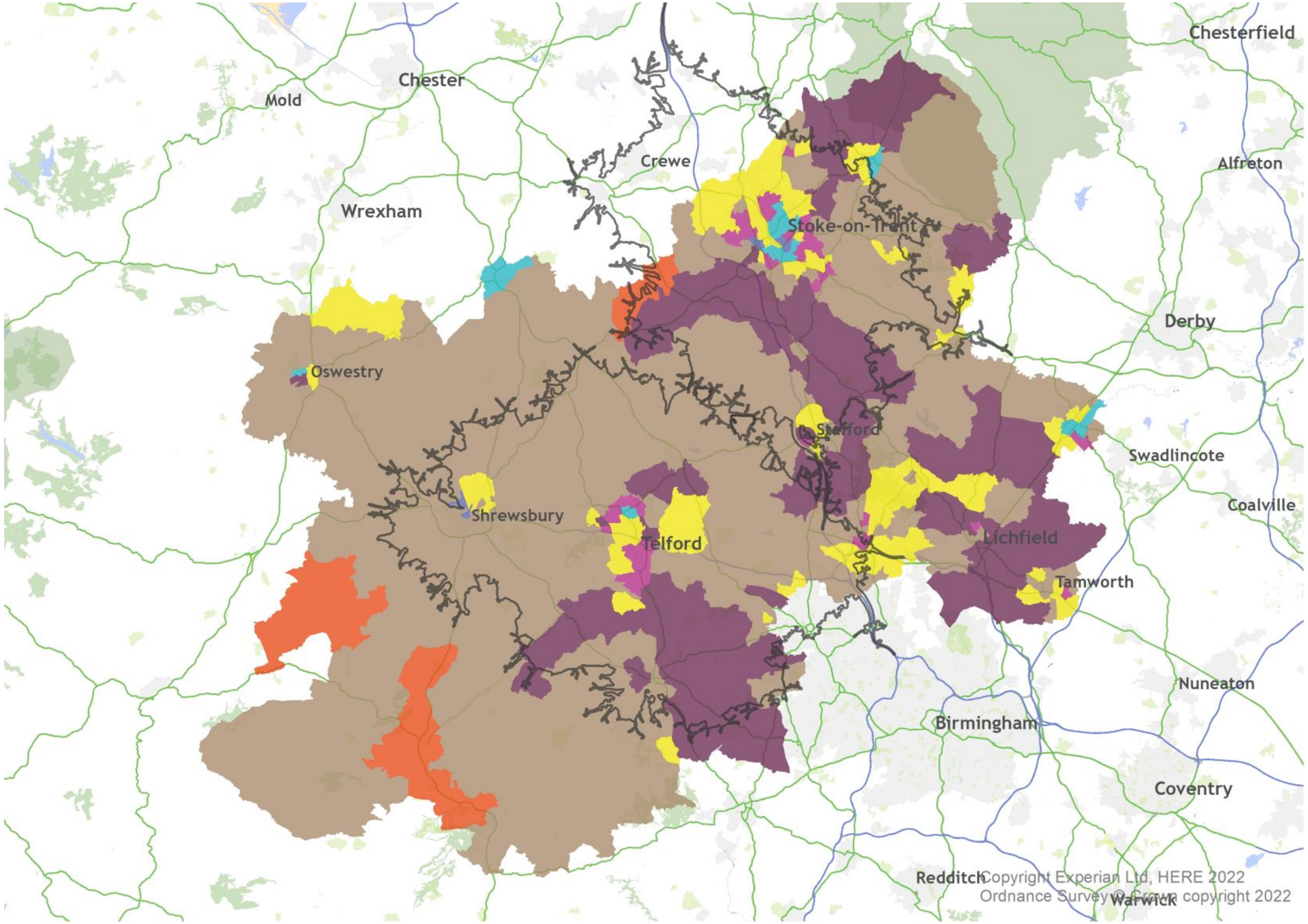

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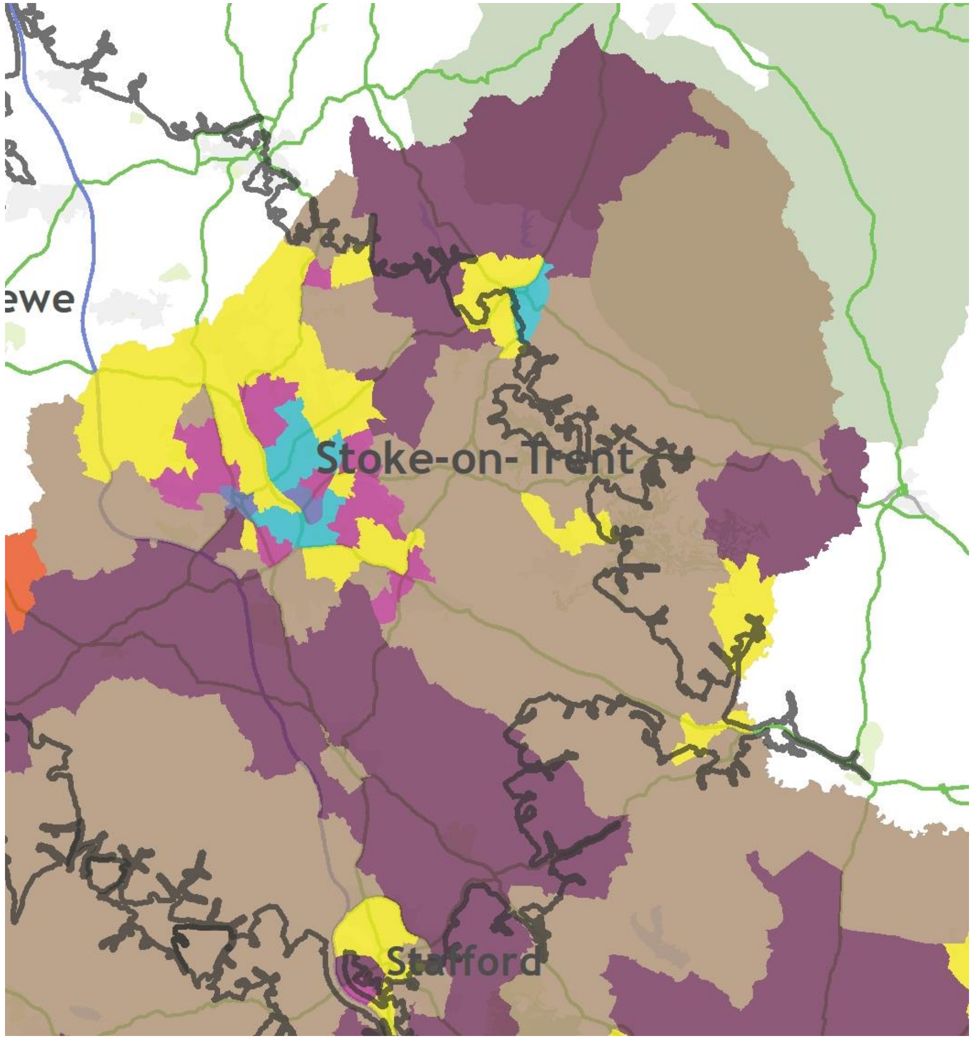

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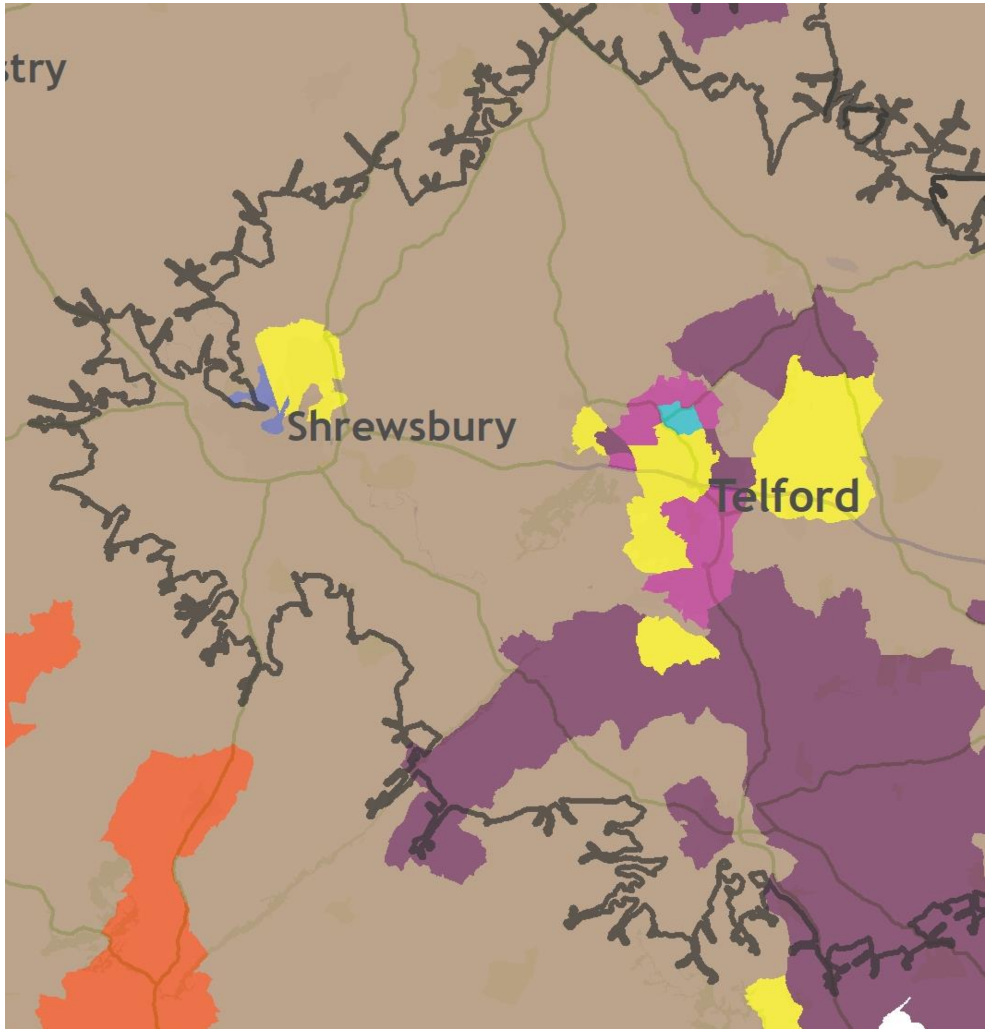
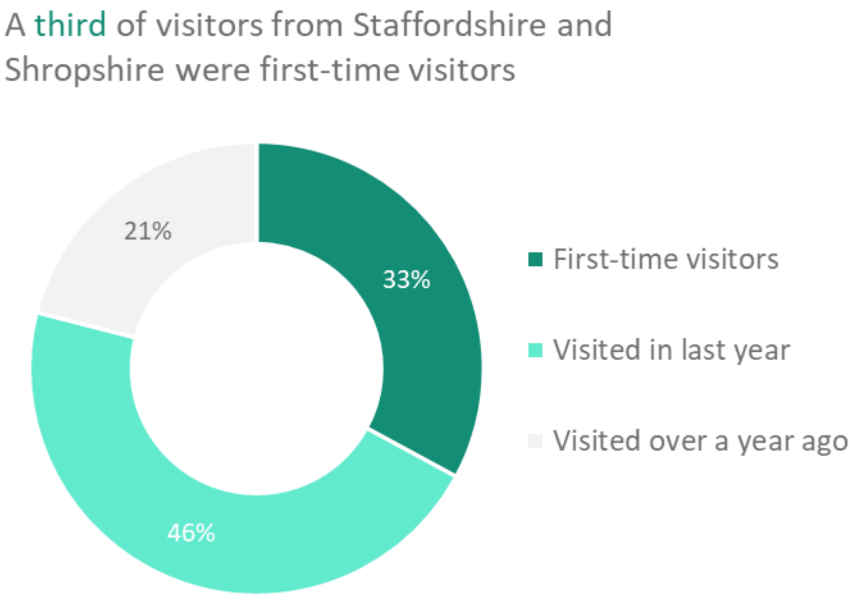
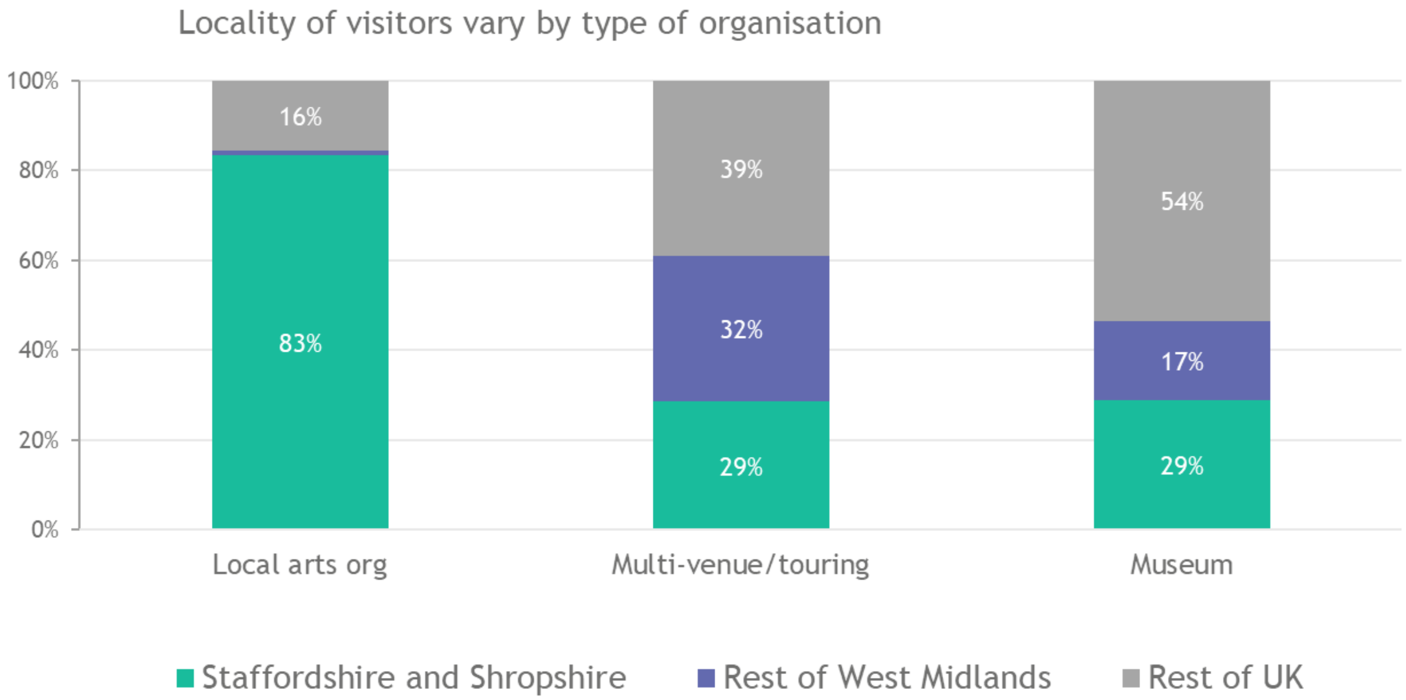


Where are Local Audiences Attending?

Local/Non-Local Audiences - Audience Finder Surveys





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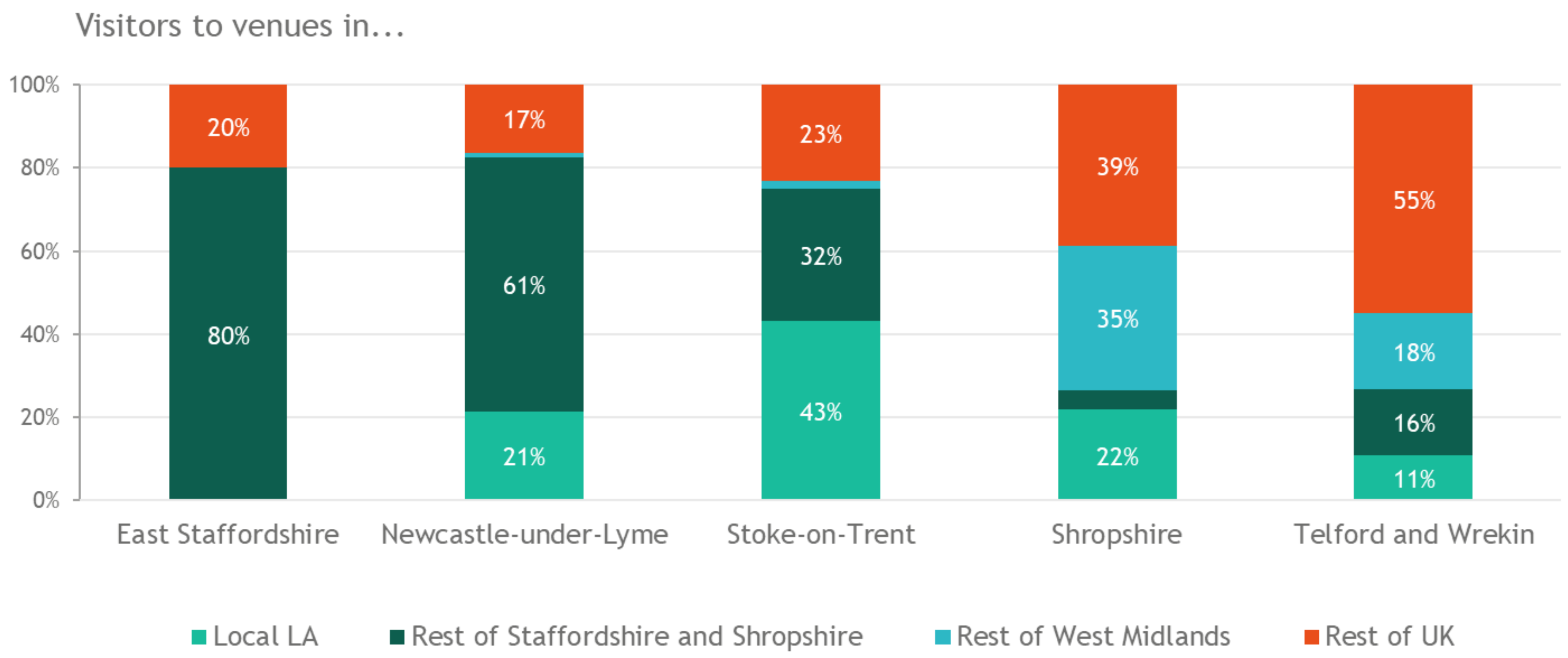
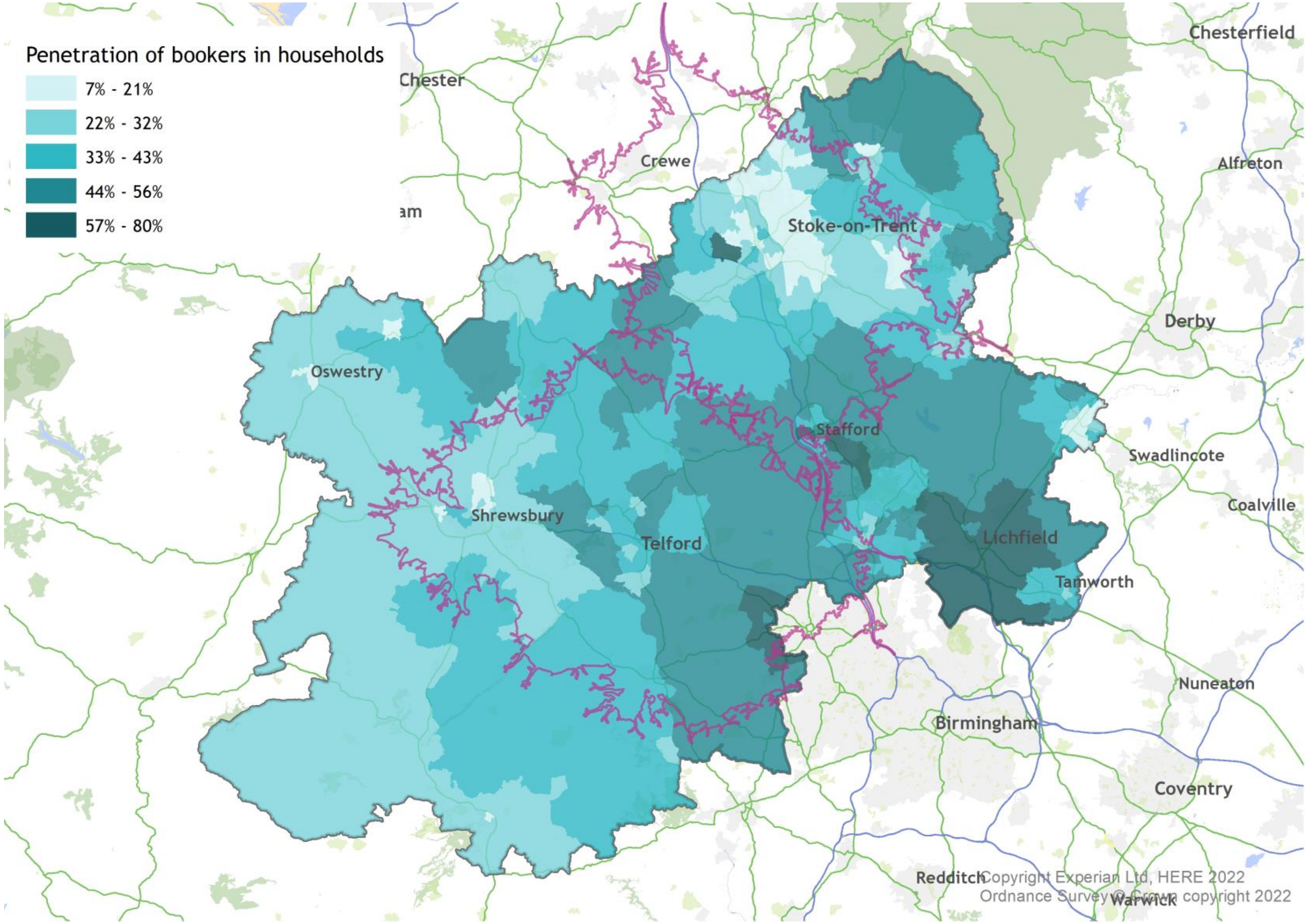


Audience Concentrations – Household Penetration



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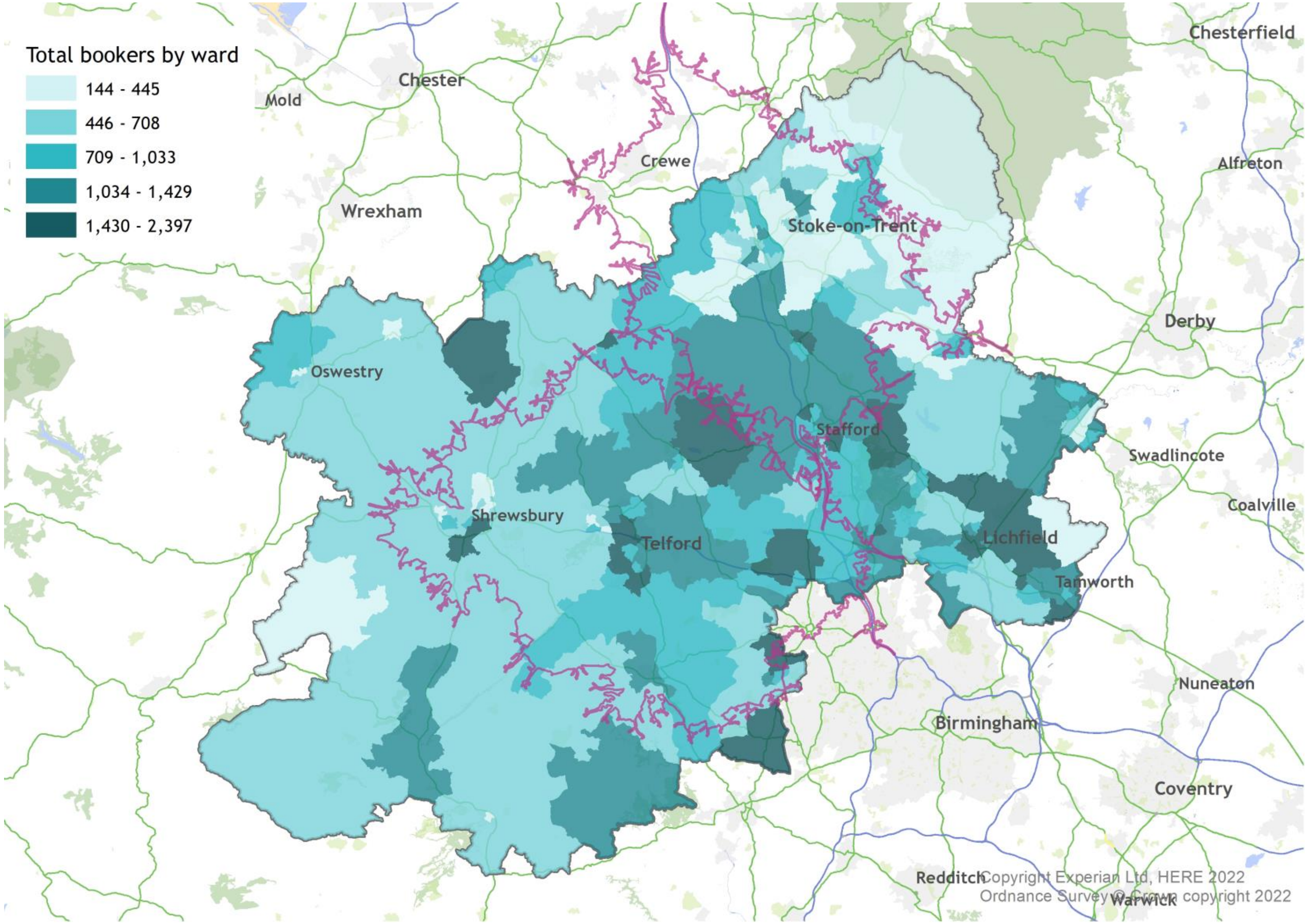
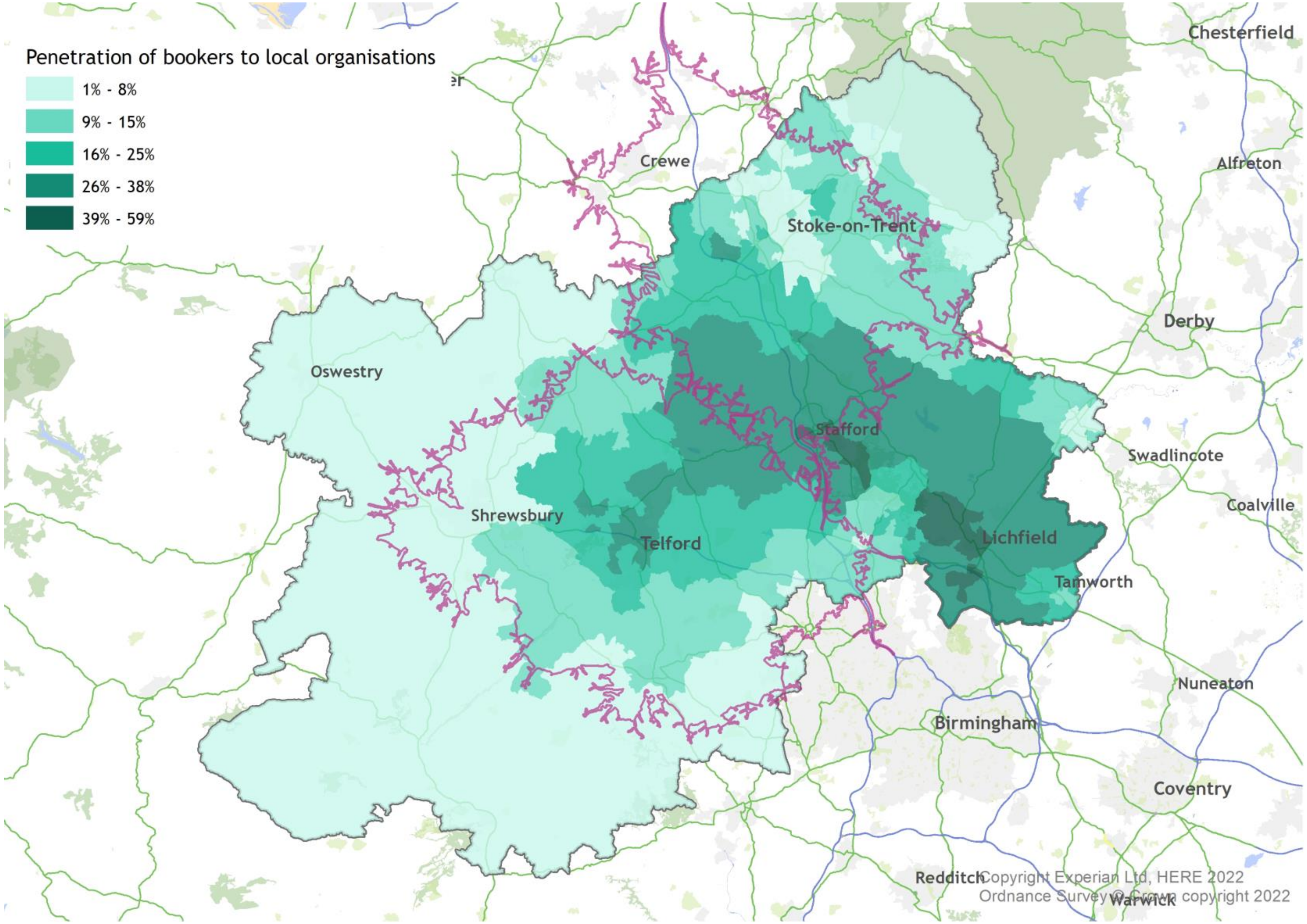
Audience Concentrations – Booker Count



Audience Concentrations – Local organisations penetration



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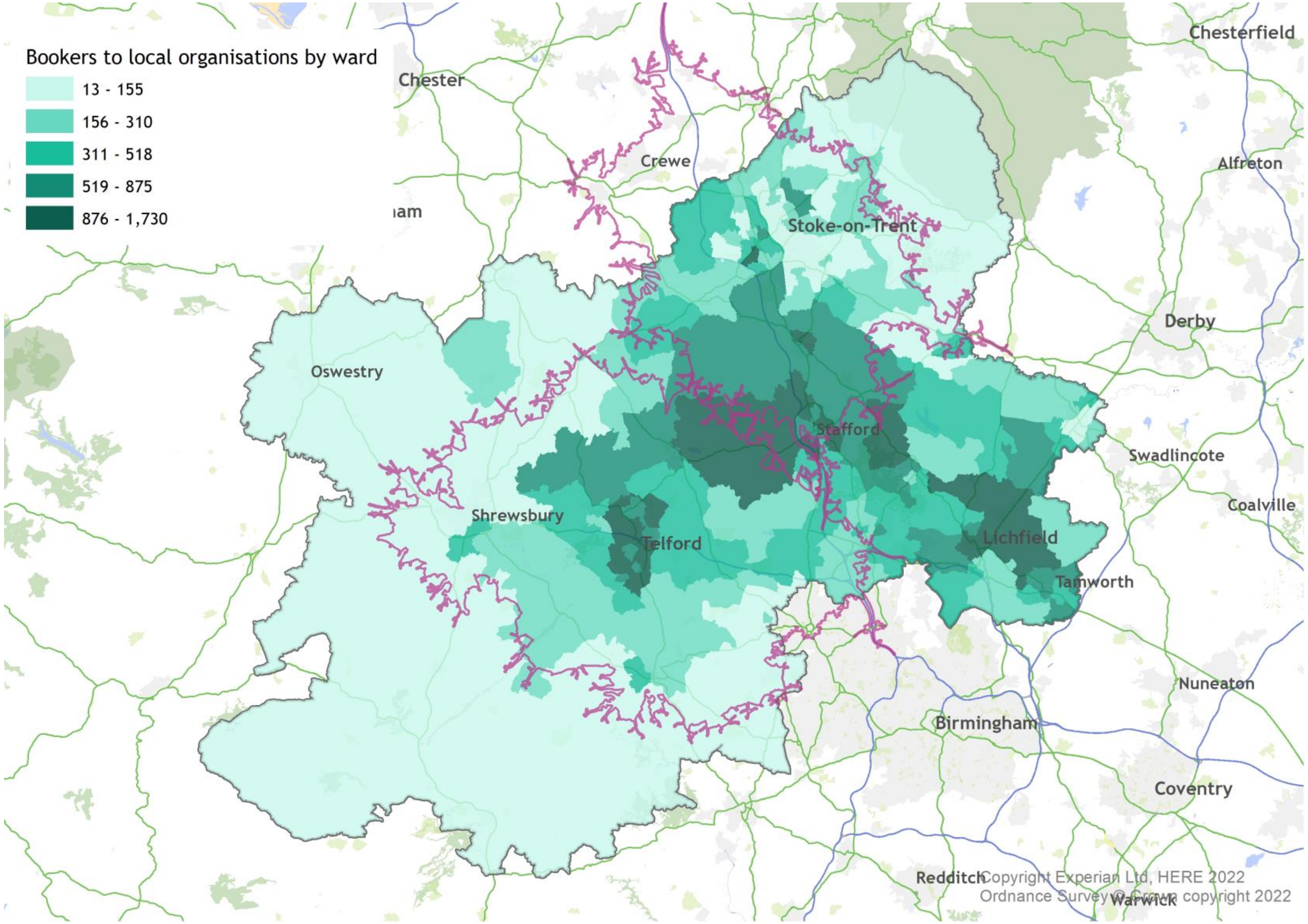
Audience Concentrations – Local organisations booker count



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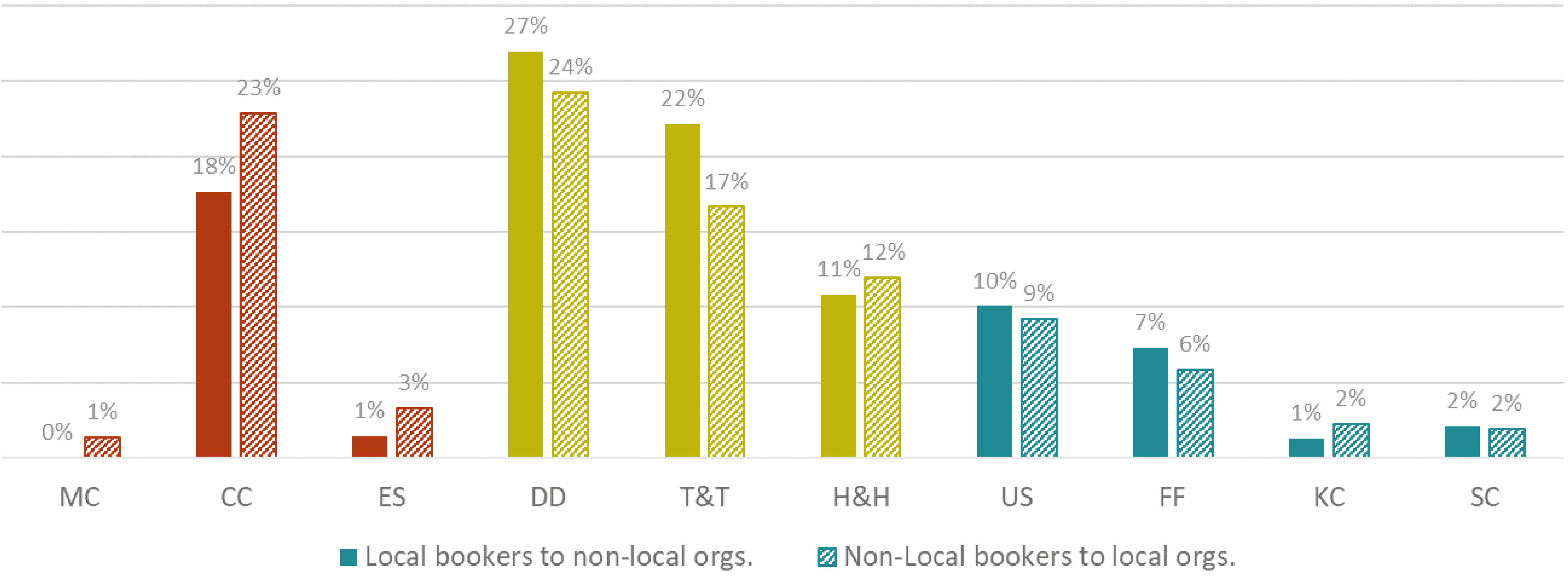
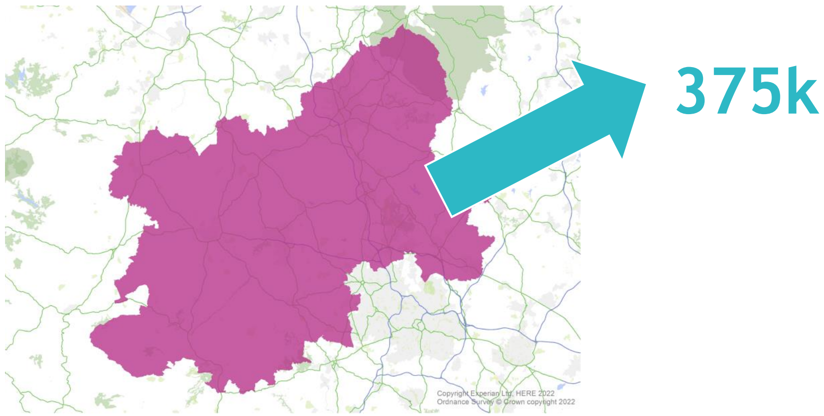
What Do We Know About Non-Local Audiences to the Local Area?

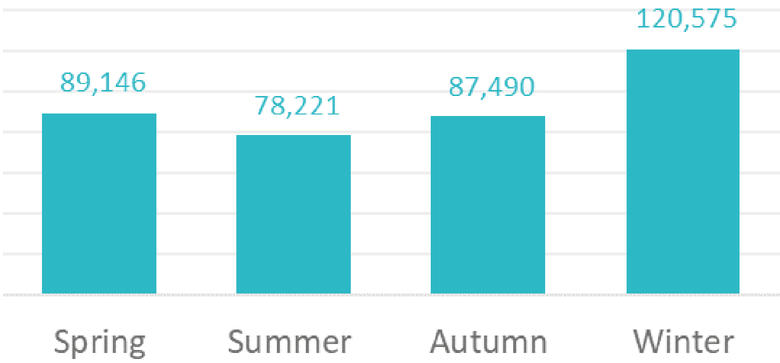
Non-Local Audiences

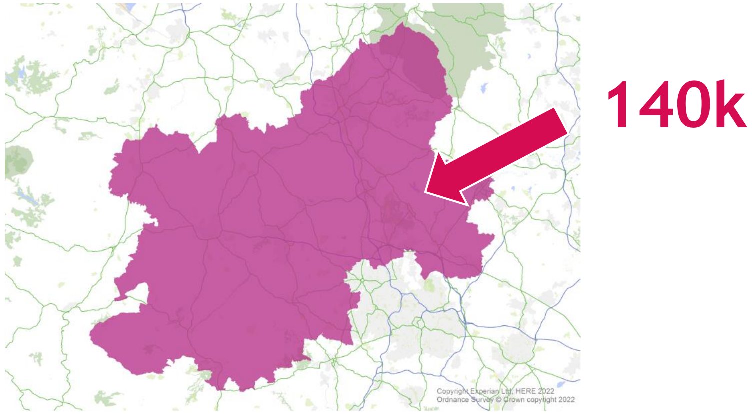


Non-Local Audiences – volume of tickets

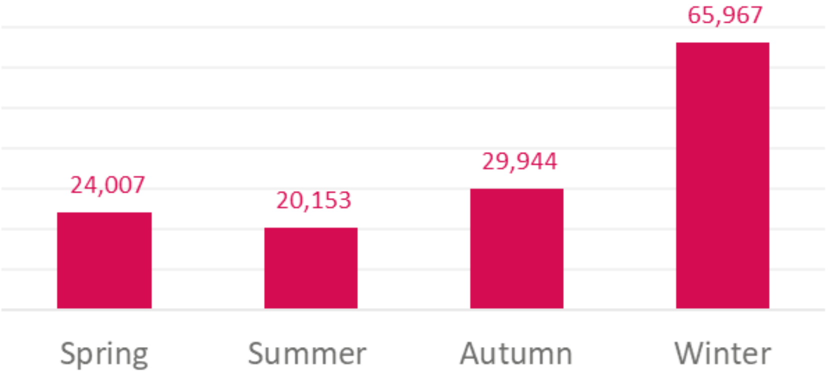


Seasonal tickets - local bookers to non-local organisations

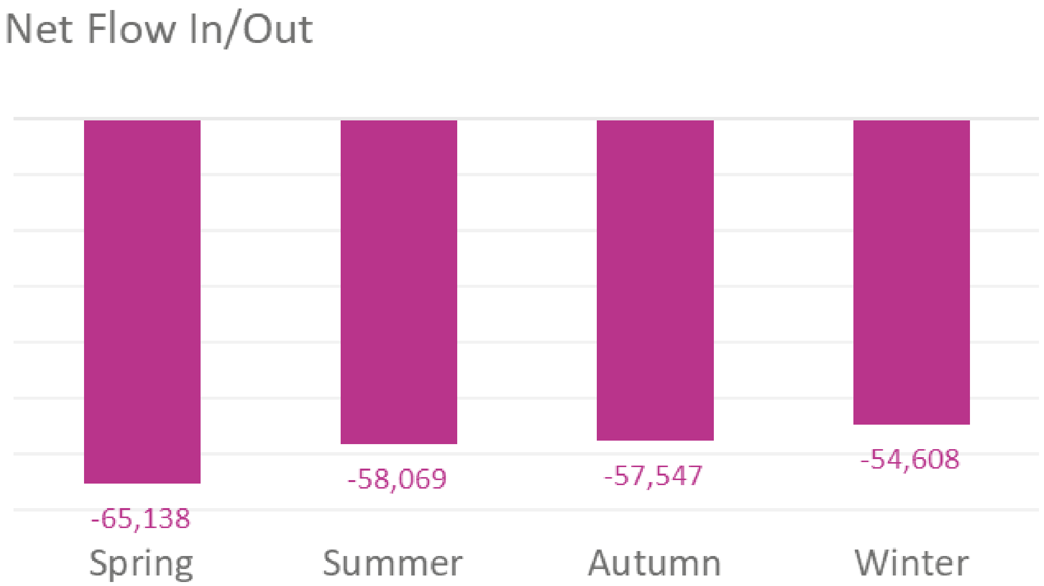


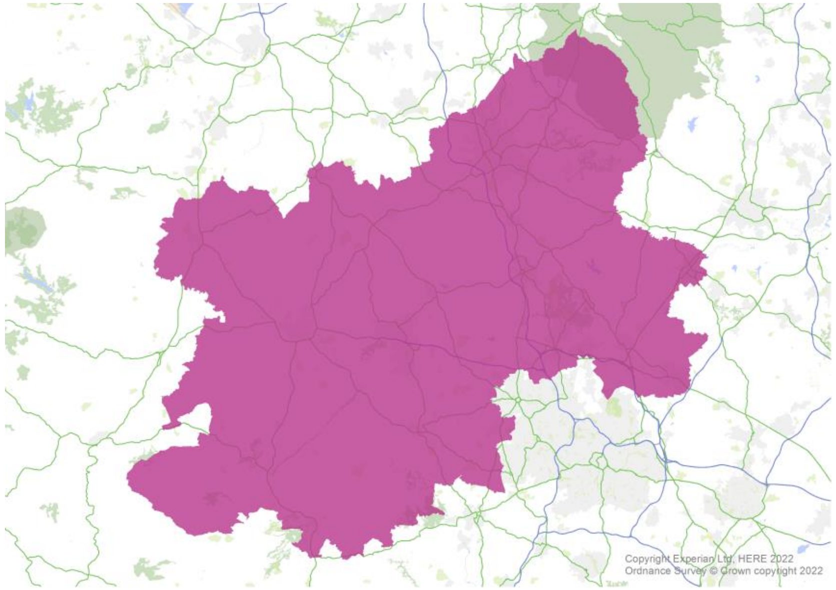


Seasonal tickets - non-local bookers to local organisations



Non-Local Audiences





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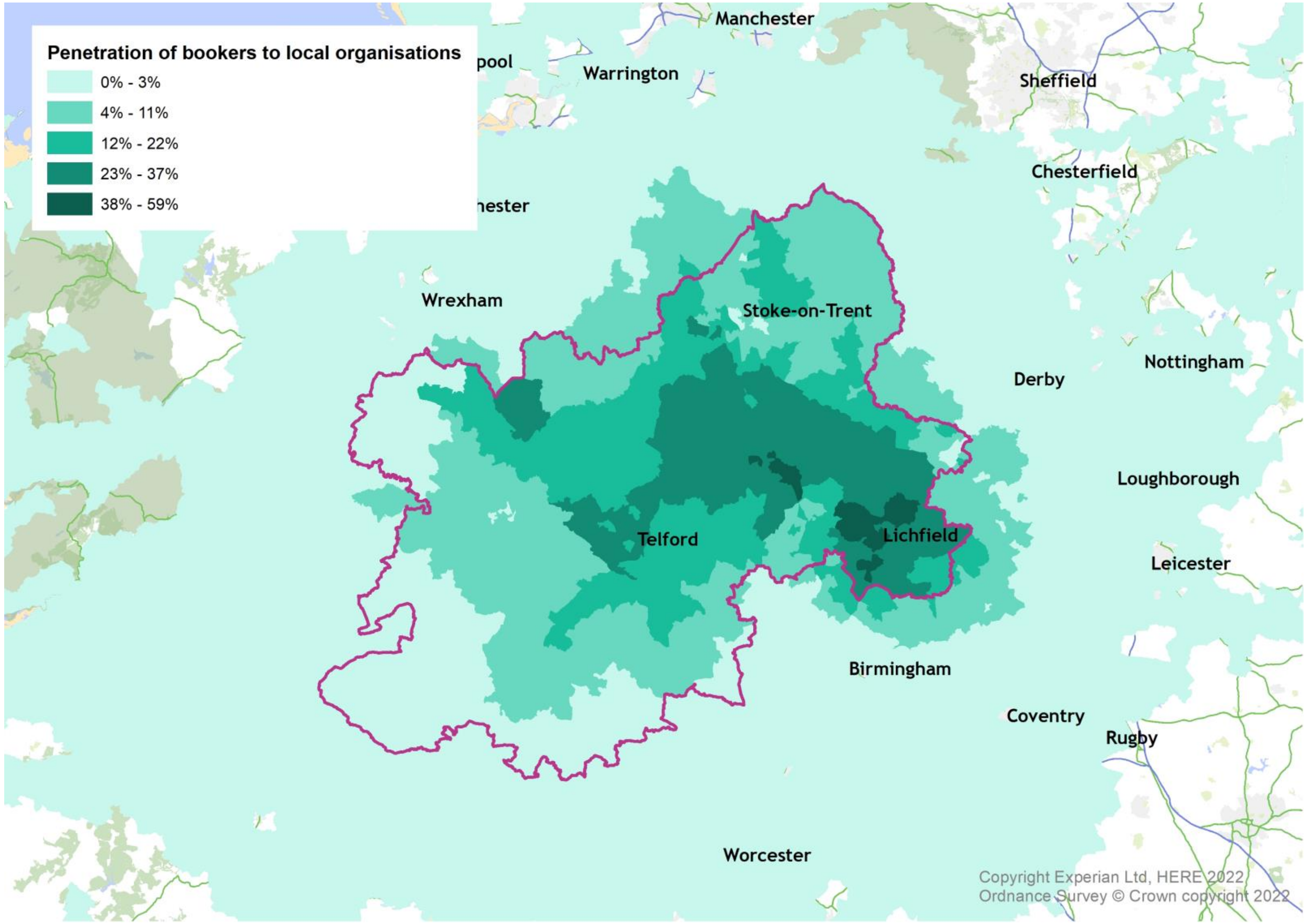
Bookers to local organisations – from further afield



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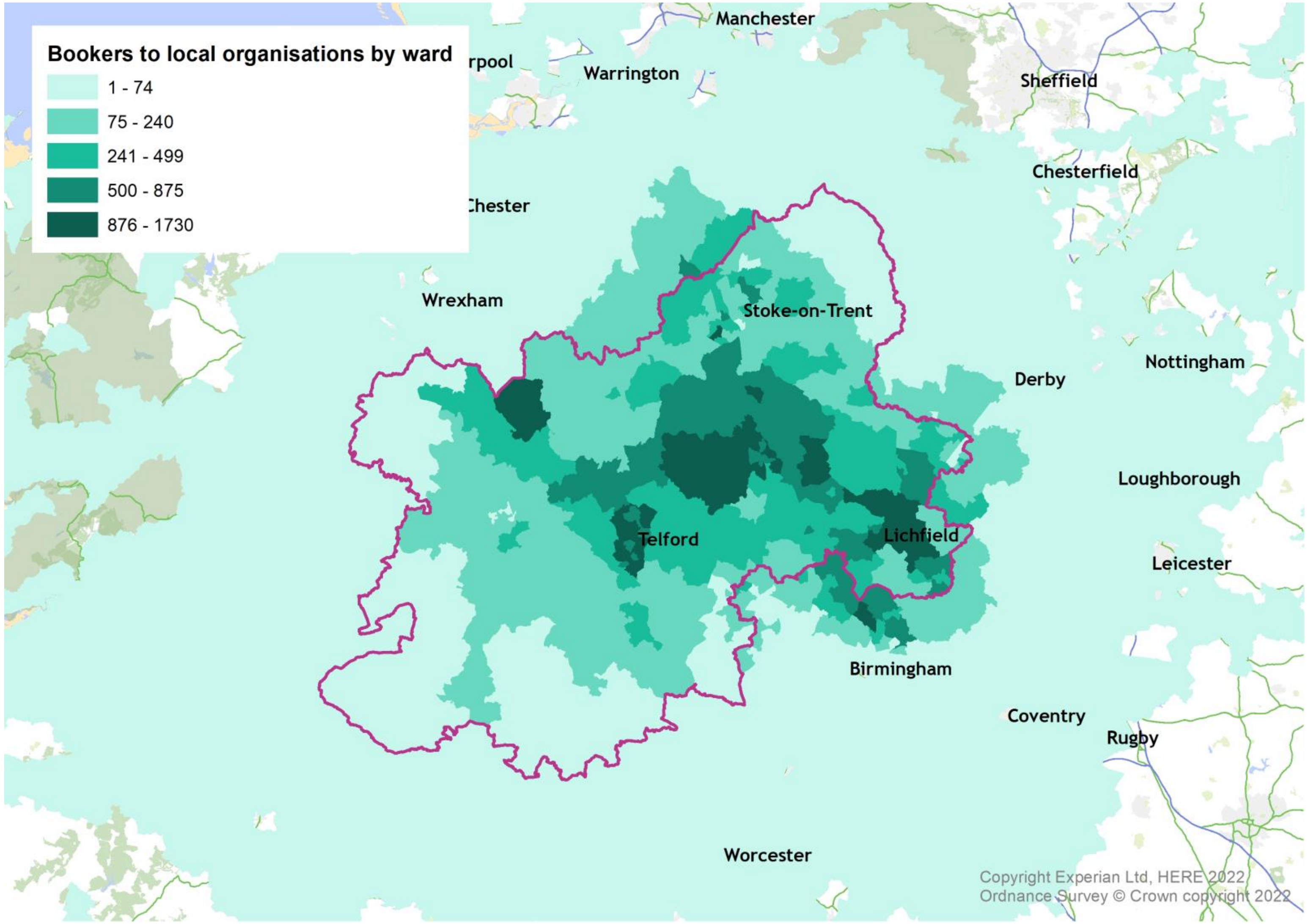
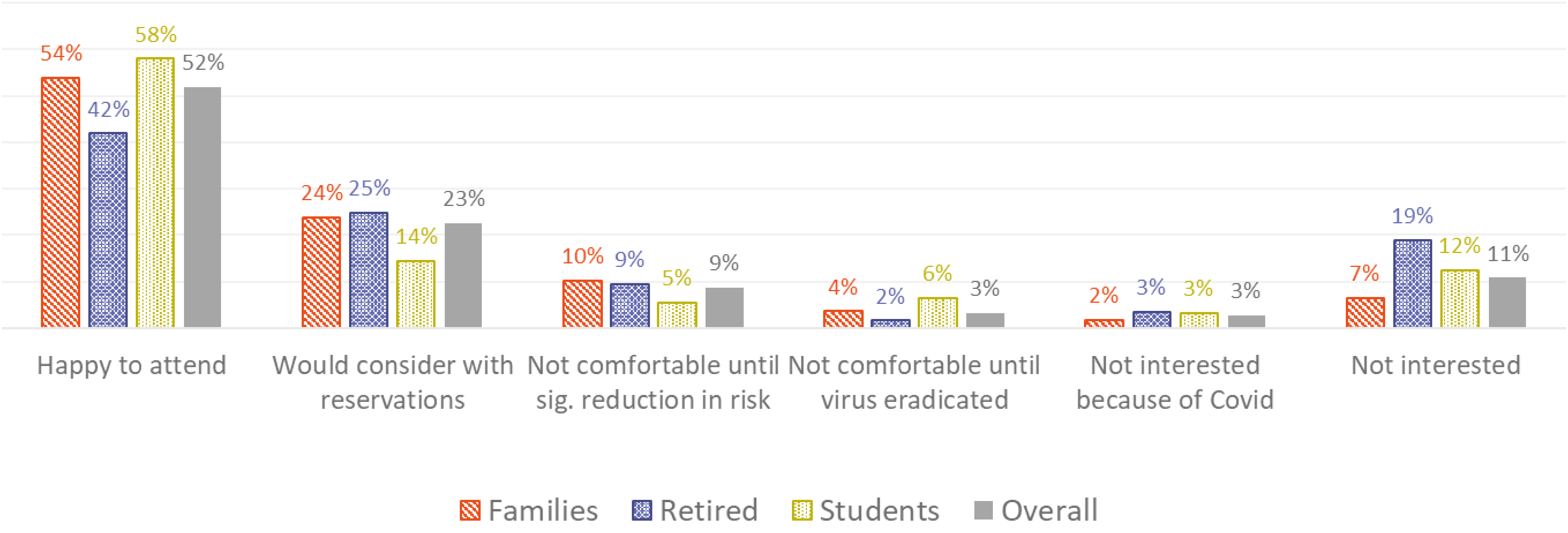
Bookers to local organisations – from further afield



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



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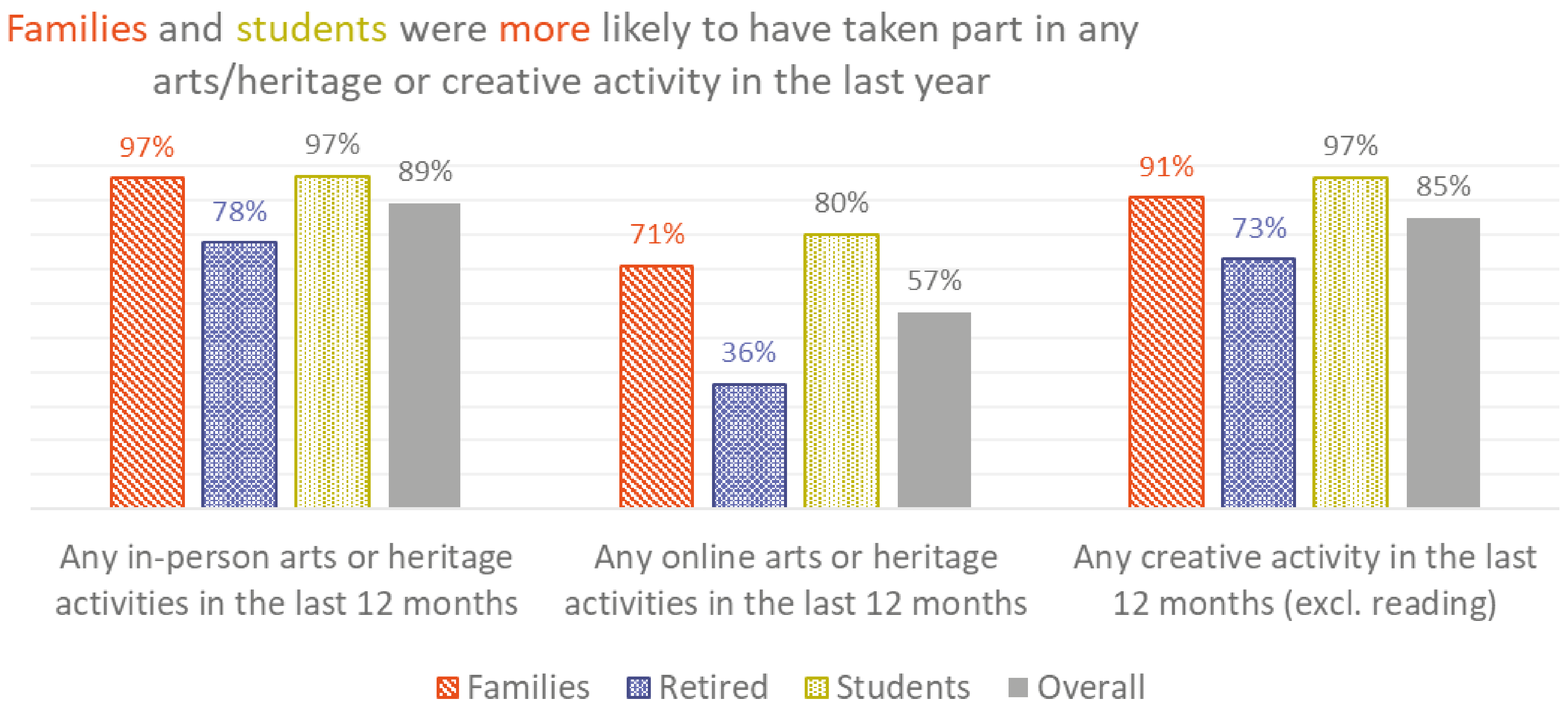
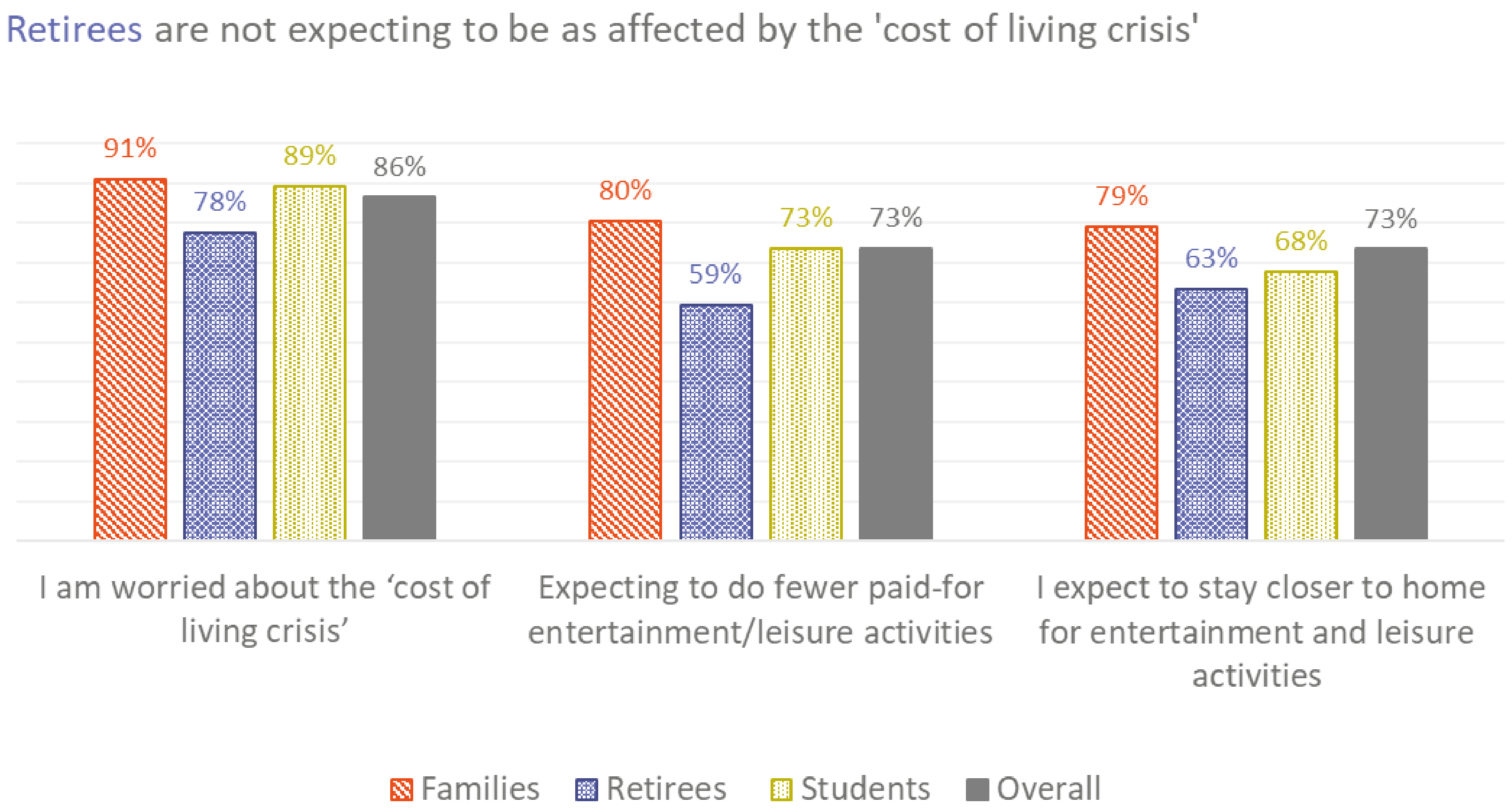
Insights from the Cultural Participation Monitor



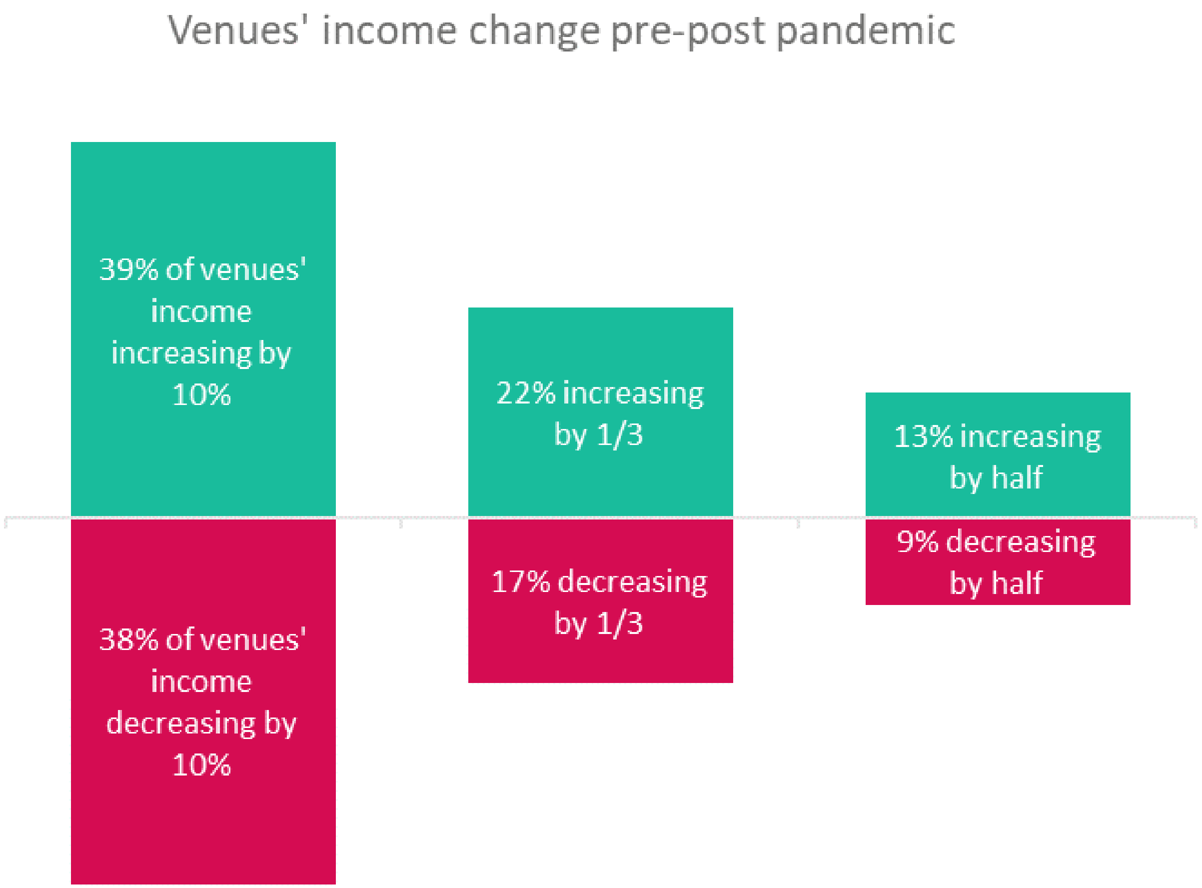
Insights from the Cultural Participation Monitor



Attitudes re Attending

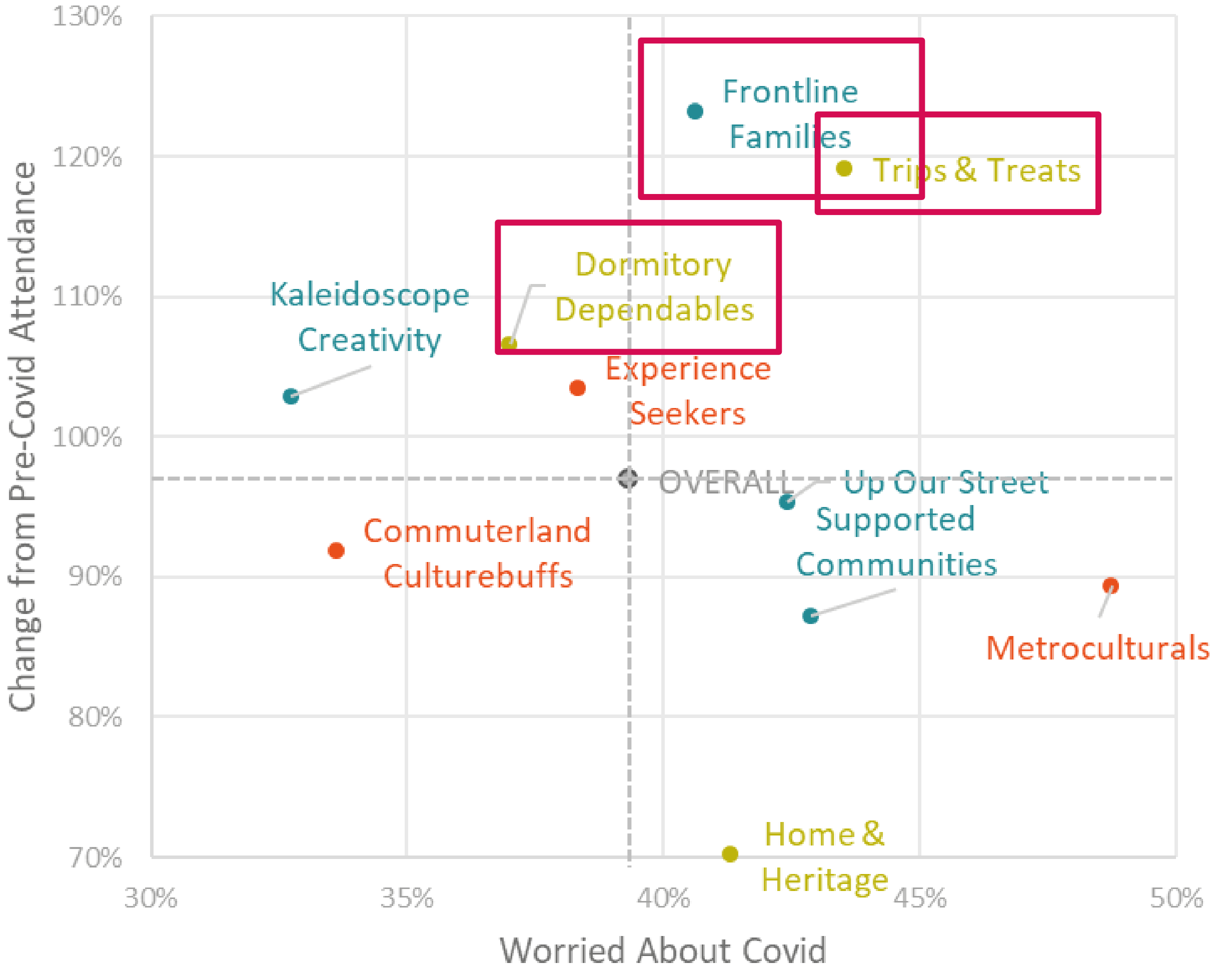
- Commuterland Culturebuffs are most likely to think it's time to 'live normally' with the risks of Covid (32% cf. 26%)
- Trips & Treats and Dormitory Dependables most likely to be happy to attend (both 58% cf. 52%).
- Home & Heritage had higher proportions among survey respondents (i.e. heritage rather than perf. arts), but are now the most reluctant to attend.
- Frontline Families most worried about the cost of living crisis (89% cf. 82% net agree) and are prepared to do fewer paid-for activities (71% cf. 65% net agree).
- Younger people are more likely to have attended arts/heritage recently, as are families, the previously highly engaged, and those without disabilities.
- West Midlands overall is mostly in line with national averages in terms of engagement.

Analysis of the post-restrictions cultural recovery



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

Implications



What Are the Implications?

In Conclusion…?

- More older groups than average (esp. in rural areas): risk post-Covid?
- Similarly, the only higher-engaged group in significant numbers are Commuterland Culturebuffs (mainly C2): a threat?
- Strong rural/urban contrast – (increasing?) importance of local anchor venues?
- Lots of middle-engaged groups: potential, but threat from cost-of-living?
- Trips & Treats a key challenge/opportunity? (growing before, retain more in area?)

<u>From the discussion:</u>

- Free events sell out but little to no uptake on paid events - some audiences will respond to adding value rather than cutting costs - but not all audiences will
- Making events a whole-day experience with partner venues - rather than seeing them as competition
- Cost of living impact on shops/cafes - fewer cutting down on cafes than on shops - but both likely to reduce
- Comparing offer to destinations like London might become less relevant as we're seeing people thinking of attending more locally
- Rail strikes are having an impact on engagement : Rise in refund requests / Lower sales on strike days
- Online activities tapered off a bit starting a year ago - but could be lack of provision.

In Conclusion…?

- Shift to more local engagement may splinter the audience (esp. a challenge for Stoke, given profile in its hinterland?).
- There are 30% of Up Our Street or Frontline Families (esp. in Telford and Stoke: U2 and F2)
- Note differences of profile by segment for different artforms (and therefore the different motivations, messages and channels, for example)
- Keep close track on trends *by segment* for how Covid vs cost-of-living pressures play out…

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 Spectrum (15/12)
  - Collecting Data Effectively (23/2)
- TEA Breaks (08/12 re Shops and Cafes & monthly)

Thank you

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

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