

# South and West Scotland

## Place Based Insights

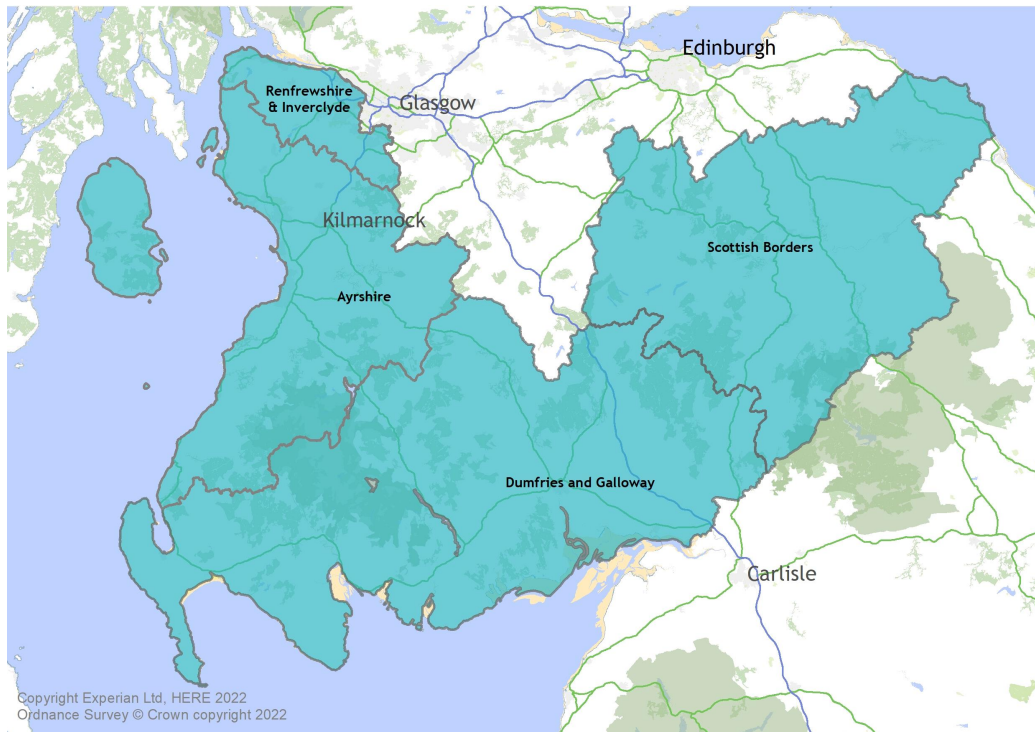
Oliver Mantell, Director of Evidence & Insight

Elise Boileau, Evidence and Insight Senior Researcher

Isaac Kay-Lavelle, Evidence & Insight Research Assistant

# 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

## Postal Sector

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

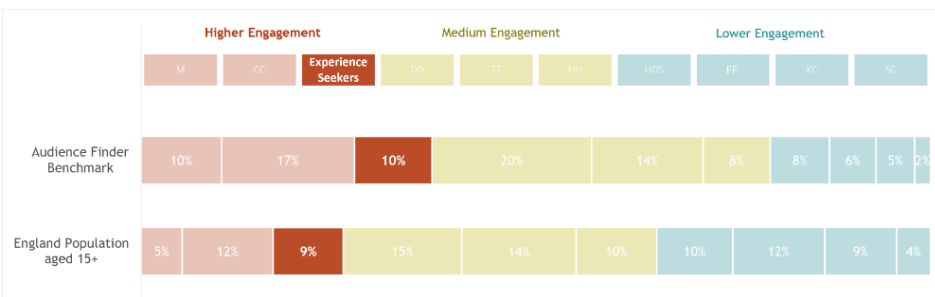
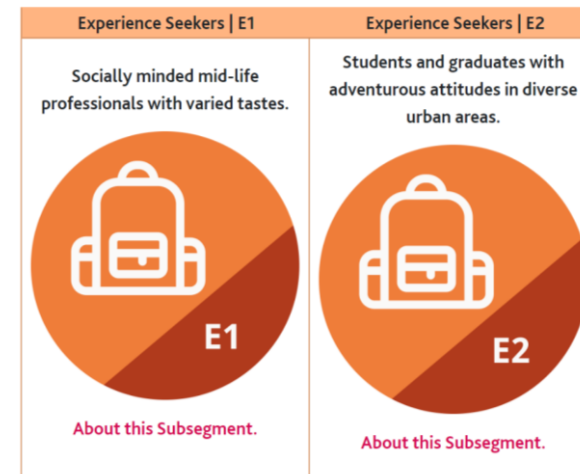
 audience  
spectrum

Population  
segmentation based  
specifically on arts  
and cultural interests  
and behaviour



# 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:

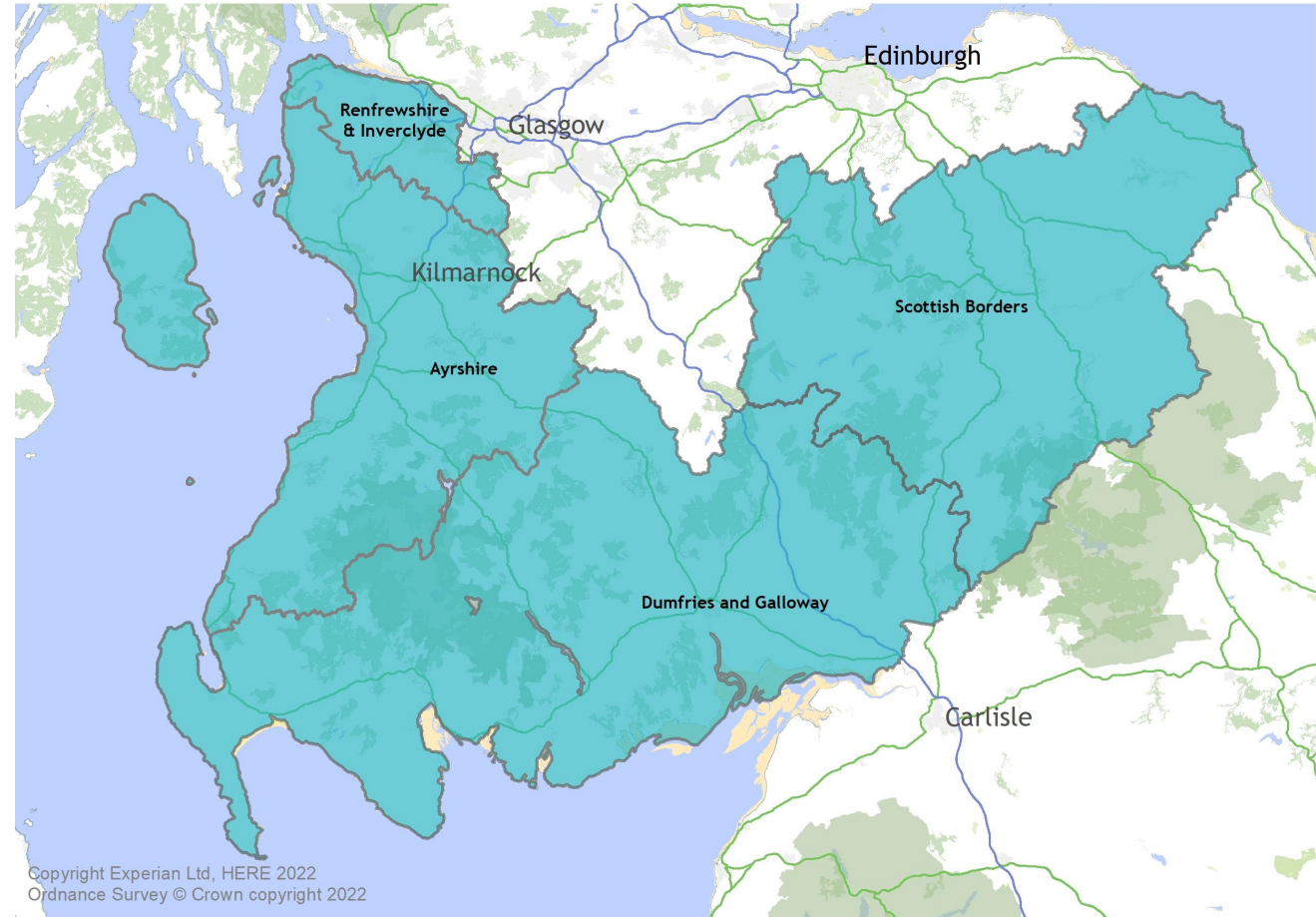
Activity Level	Highly Cultural Engagement
Spectrum Ranking	3/ 10
Audience Finder Benchmark	10% of Active Audiences
Population Prevalence	9% of UK Population

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

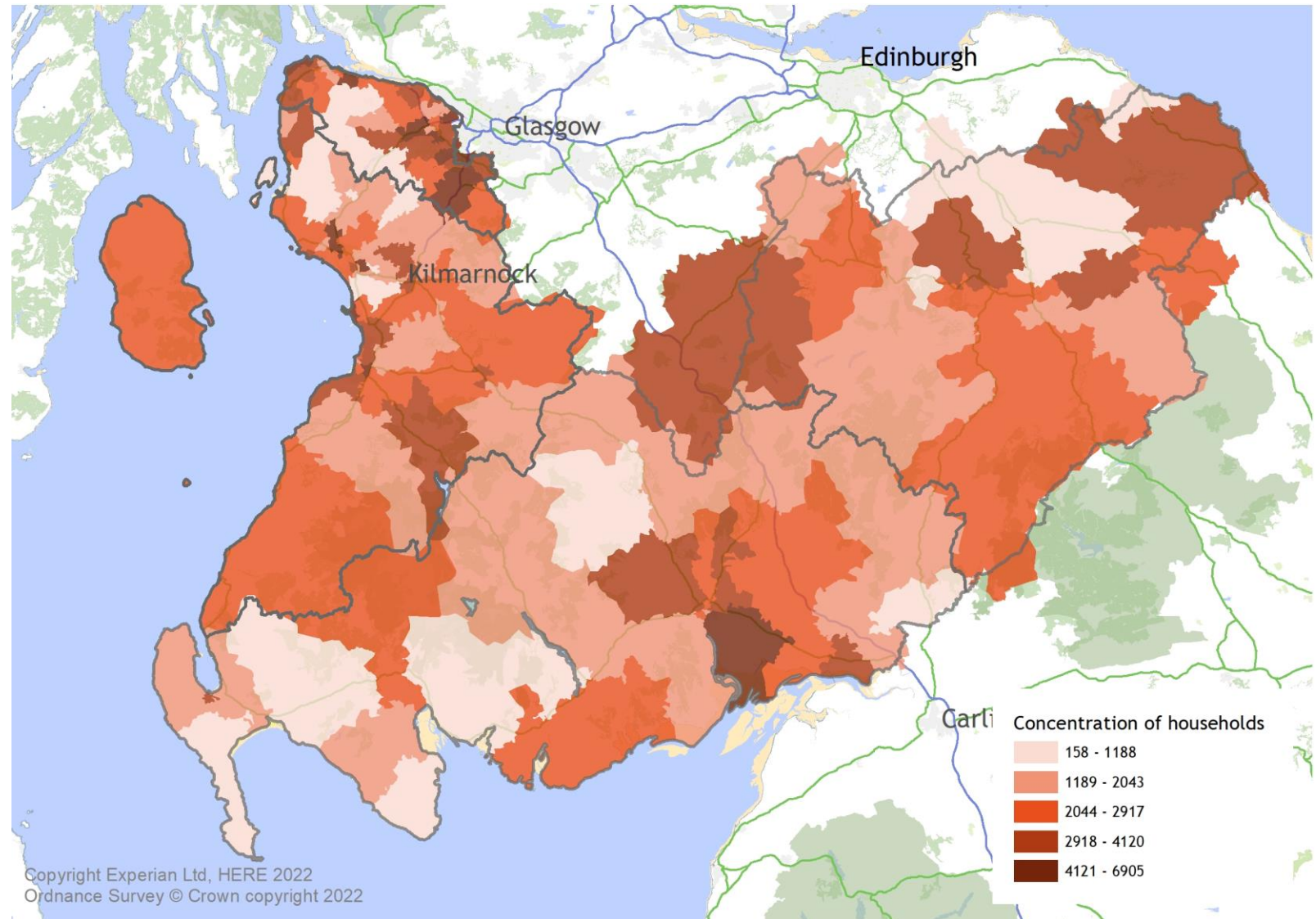
Who are the local population?

# Local Area and Population

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



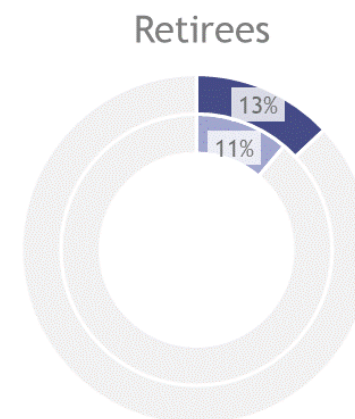
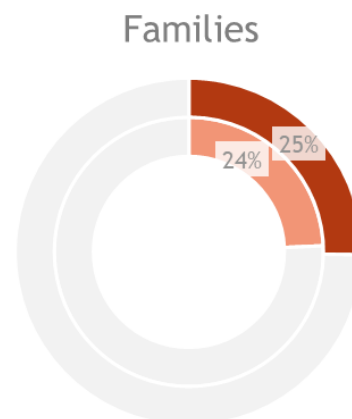
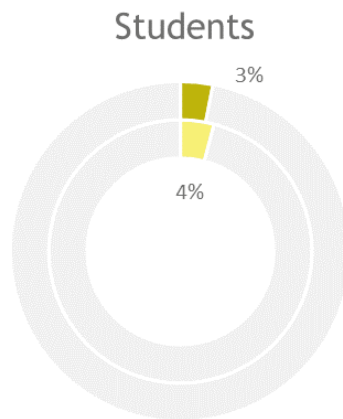
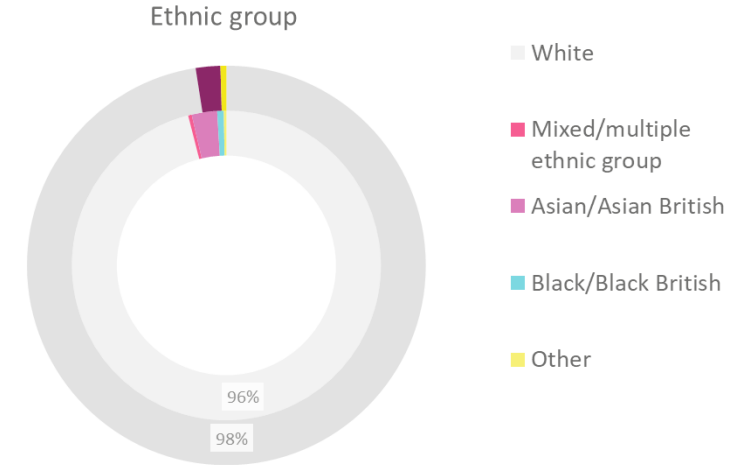
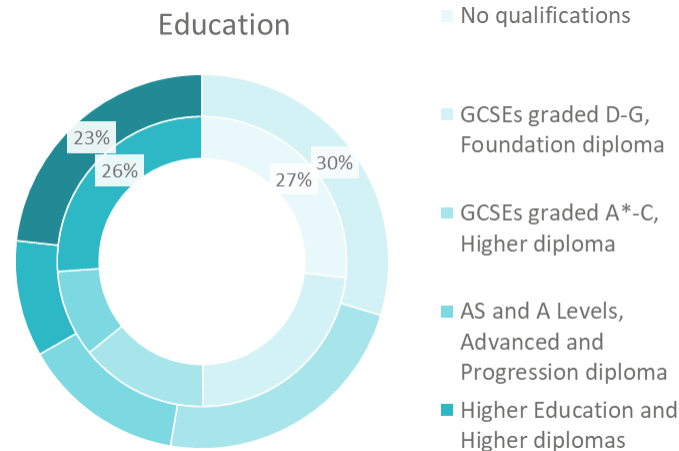
# Population concentration



# Population data – compared to rest of country

Outer ring: South & West Scotland

Inner ring: Scotland

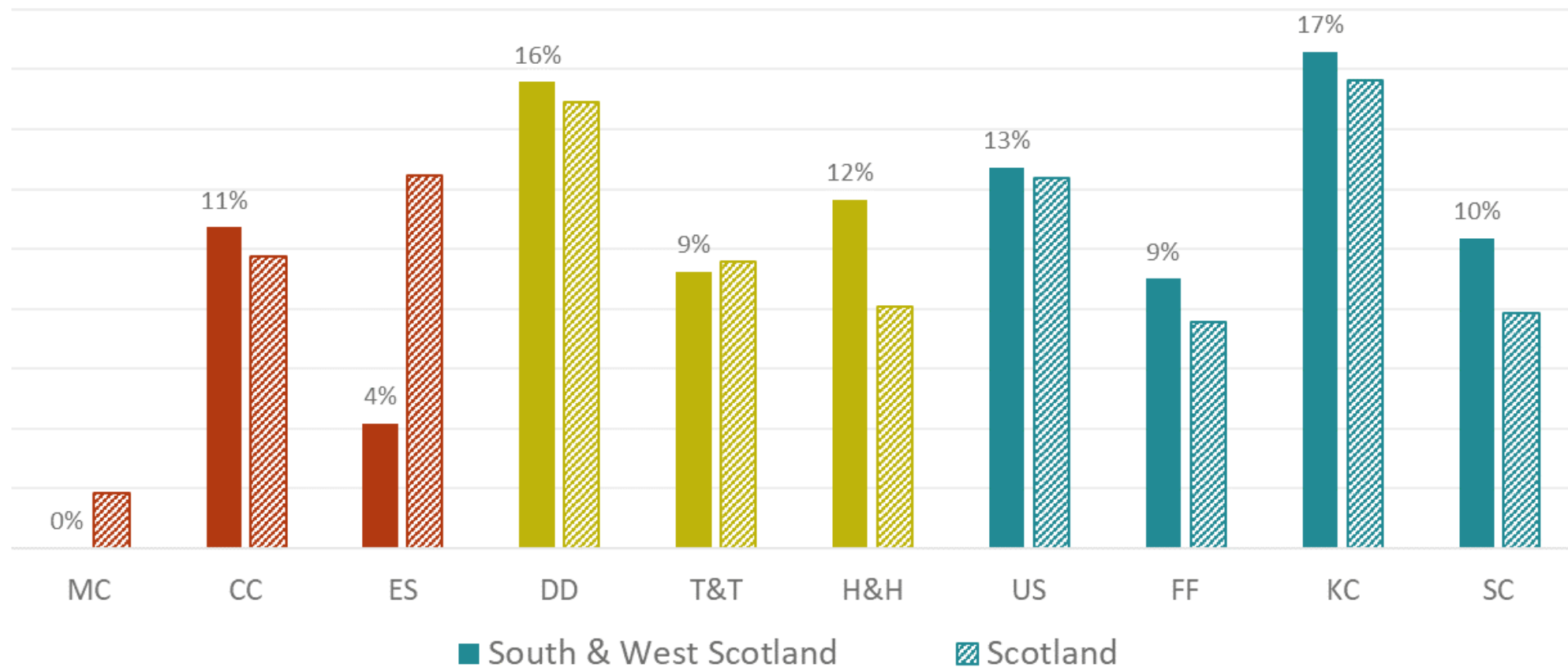


Source: Census data 2011



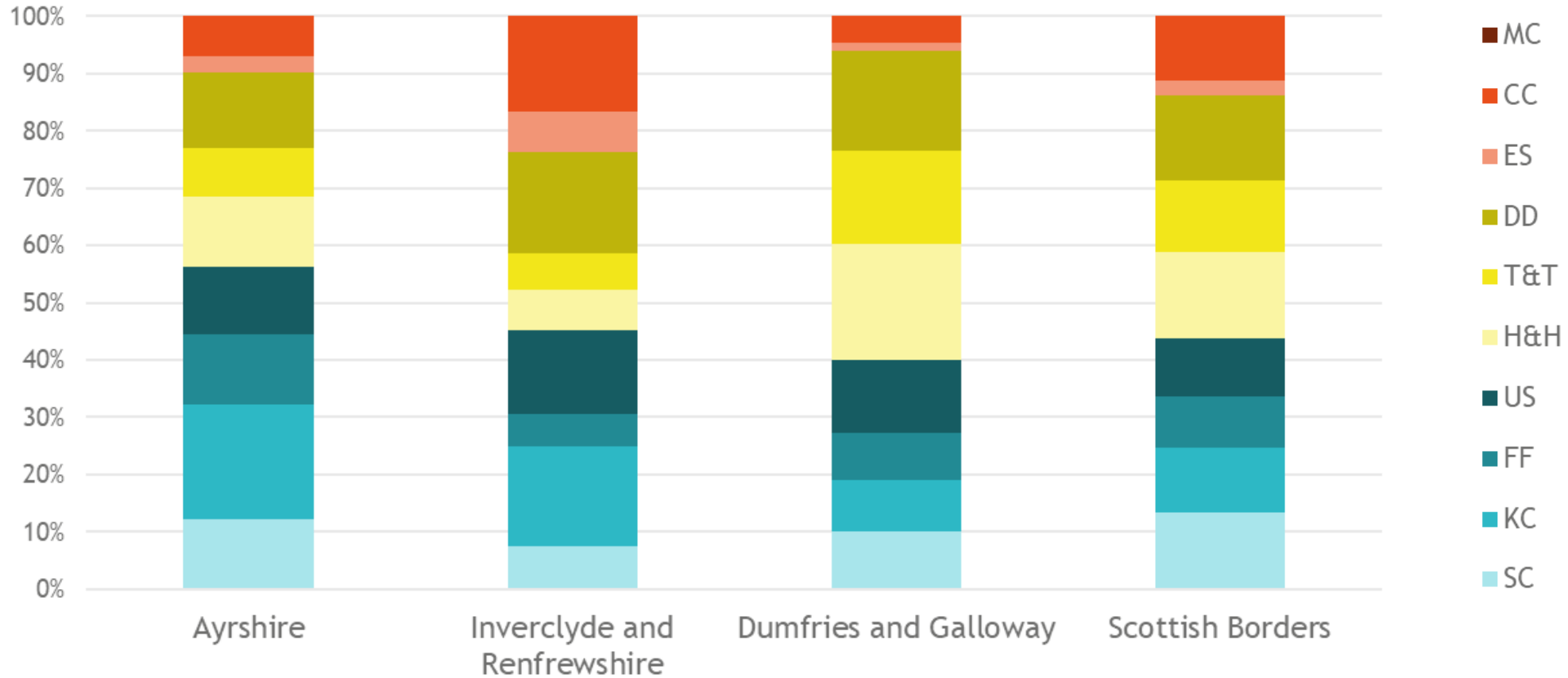
# Overall Population Audience Spectrum Profile

Lower engaged segments make up 49% of the population  
Audience Spectrum profile for households (2020 estimate)



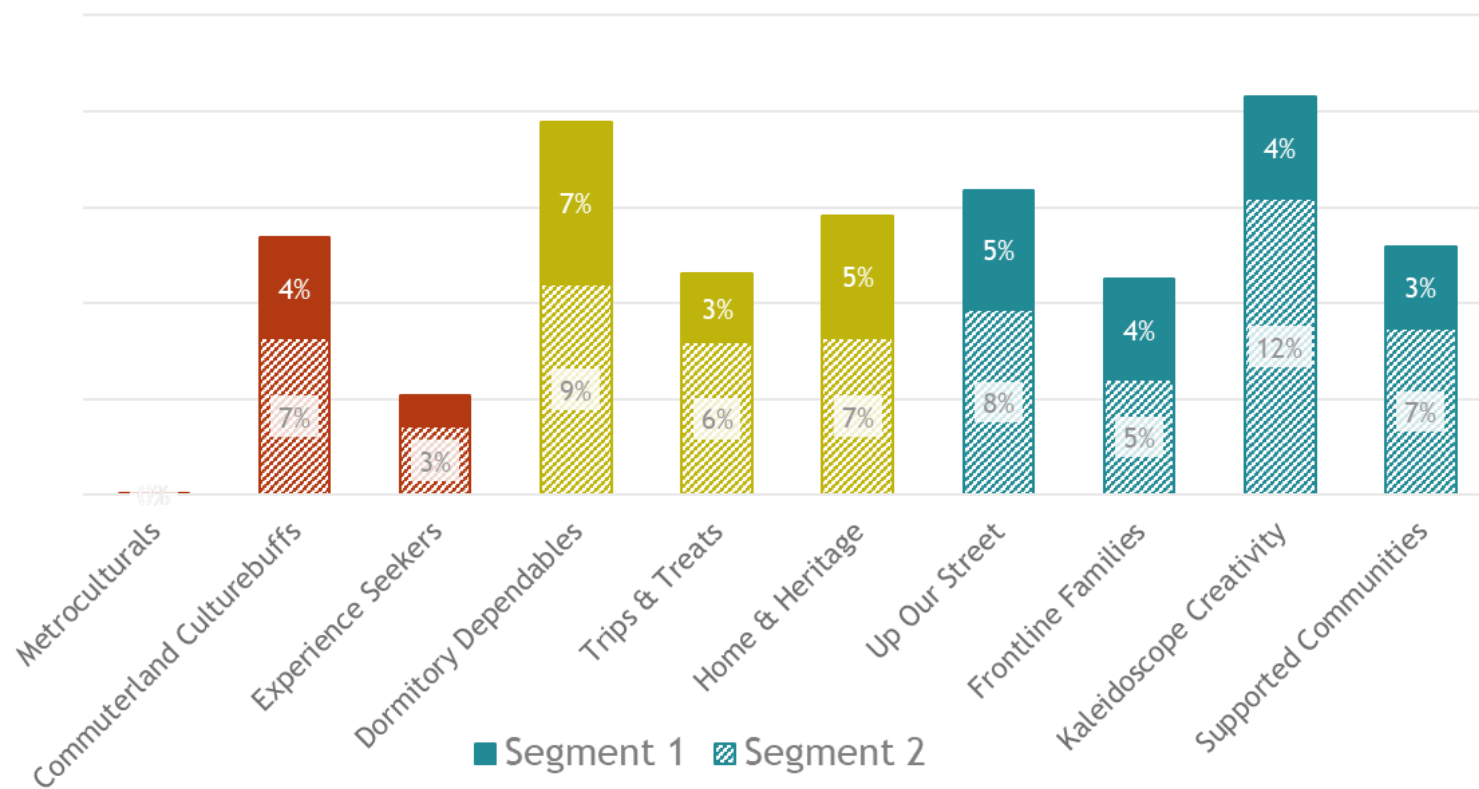
# Population Audience Spectrum Profile – by Area

Ayrshire has higher proportions of lower engaged segments



# Overall Audience Spectrum Profile: Enhanced

South & West Scotland Enhanced Audience Spectrum Profile



## Commuterland Culturebuffs | C2

Wealthy empty-nesters with comfortable, rural lifestyles.

## Dormitory Dependables | D2

Settled, comfortable residents, enjoying regional life.

## Kaleidoscope Creativity | K2

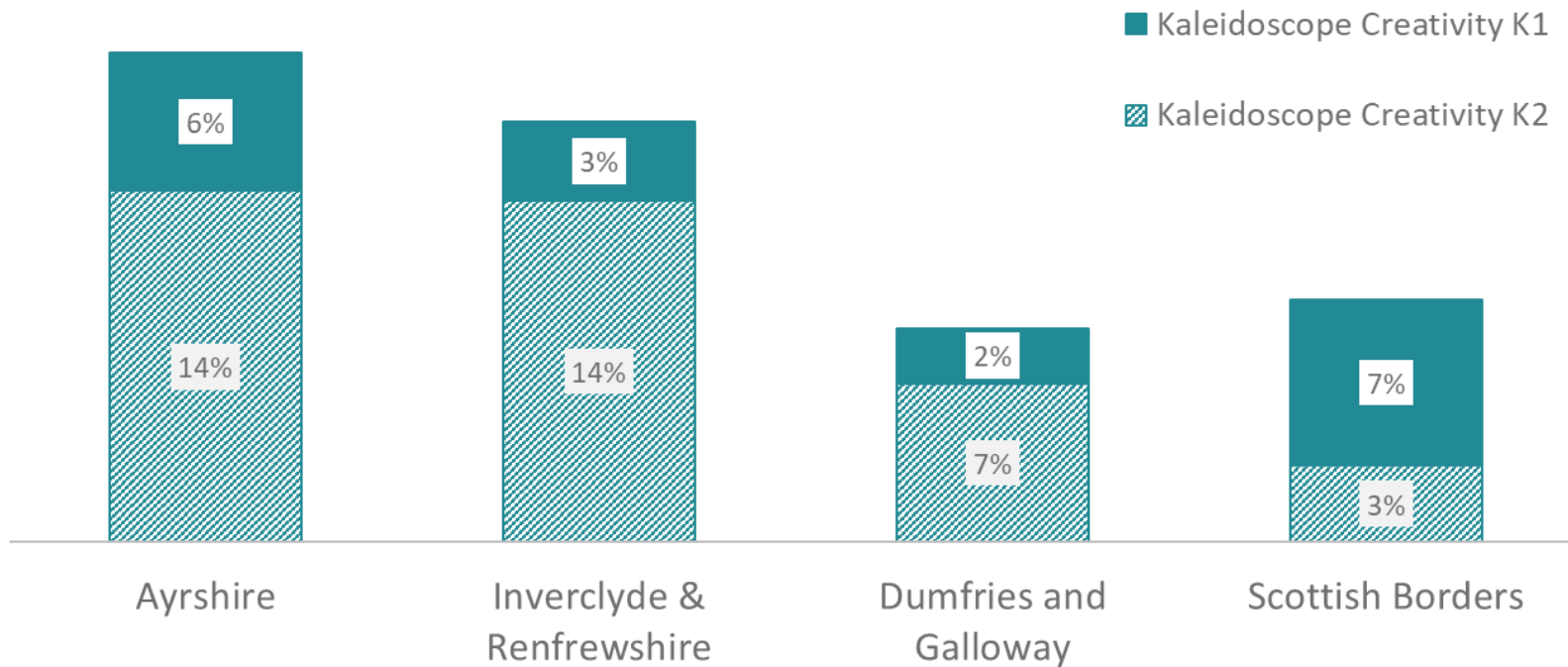
Hard-pressed singles in city tower blocks.

## Supported Communities | S2

Elderly residents of sheltered housing with declining health.

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

# Kaleidoscope Creativity Enhanced by Area



## Kaleidoscope Creativity | K1

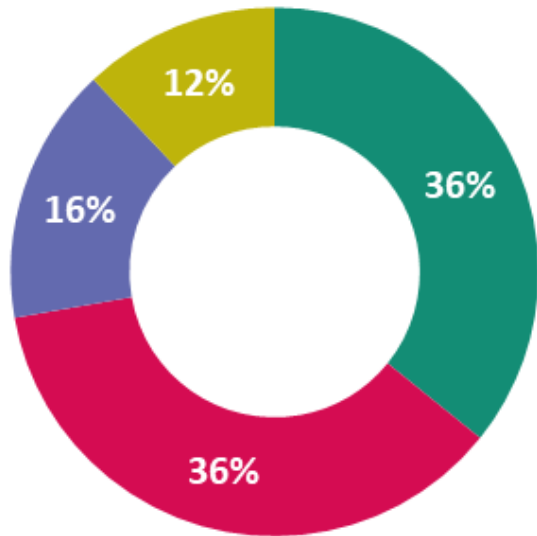
Settled and diverse urban communities.

## Kaleidoscope Creativity | K2

Hard-pressed singles in city tower blocks.

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

# Population data – comparing the local areas



**964k total:**

**358k Inverclyde & Renfrewshire:** most\* Dormitory Dependables, Commuterland Culturebuffs, most families, students.

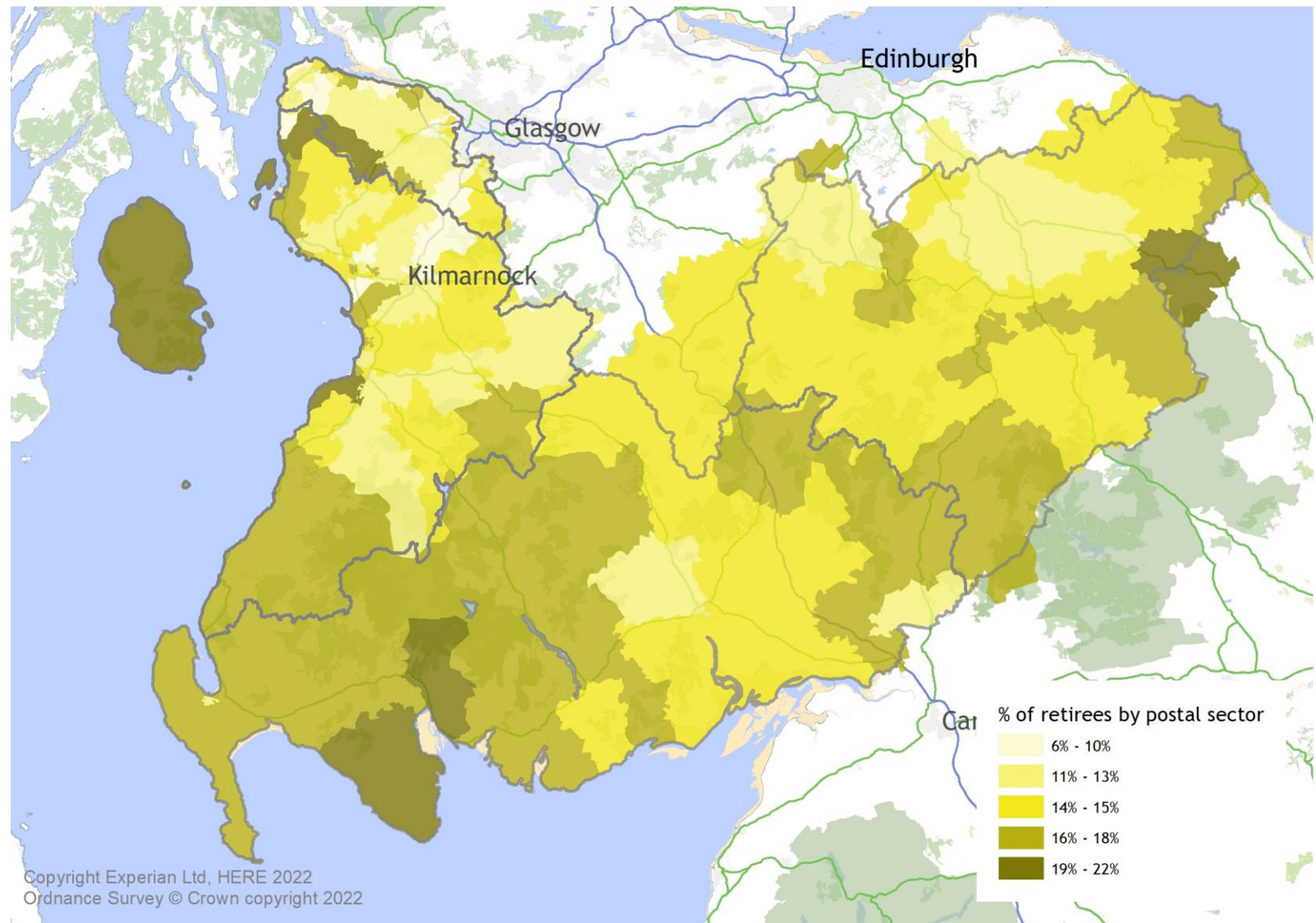
**352k Ayrshire:** most Kaleidoscope Creativity, D&E social grades, professional occupations.

**155k Dumfries and Galloway:** most Trips & Treats, Home & Heritage.

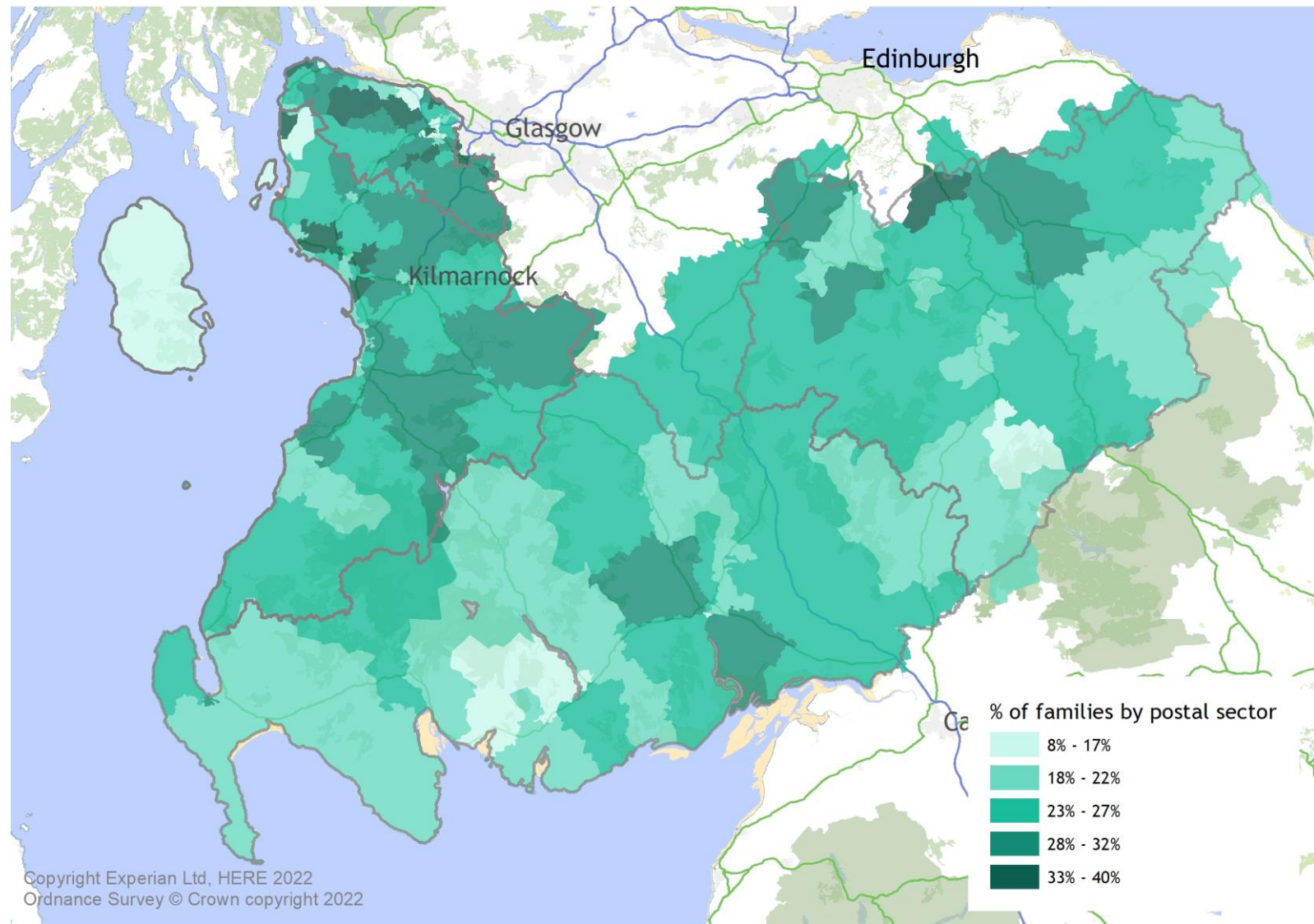
**118k Scottish Borders:** most Supported Communities, retirees, degrees/diplomas.

\*=highest % out of the four areas

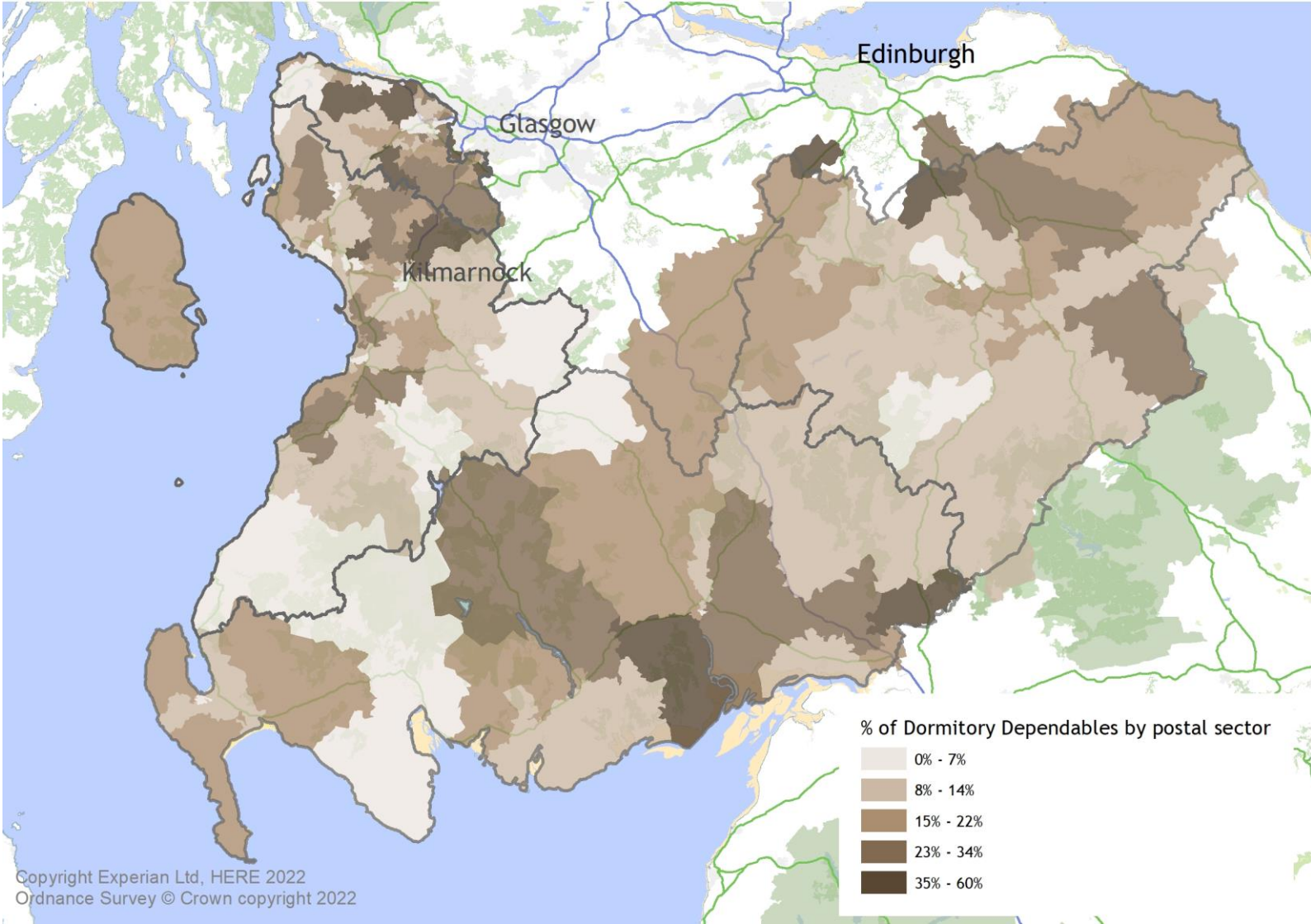
# Where do retirees live?



# Where do families live?

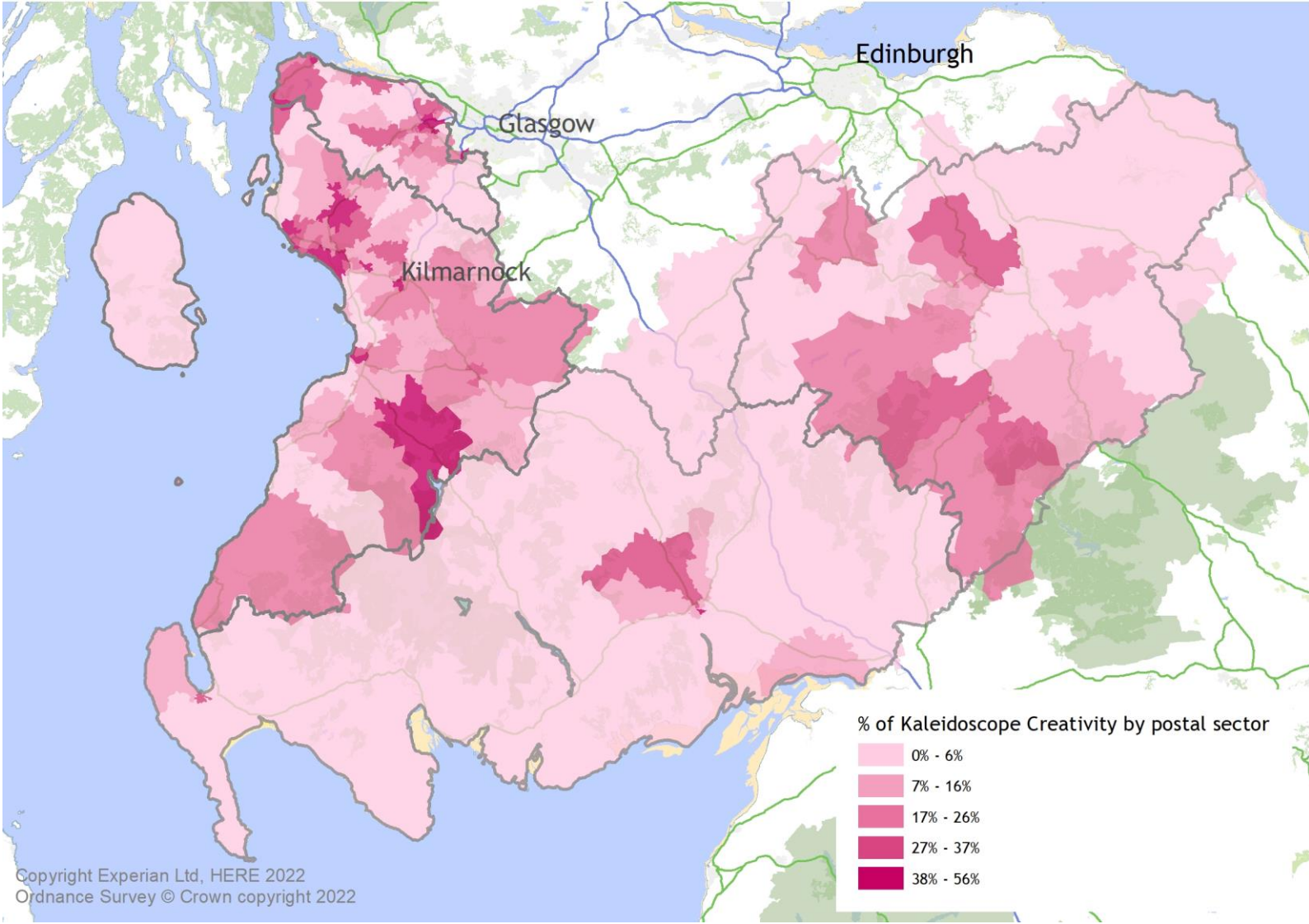


# Where do Dormitory Dependables live?





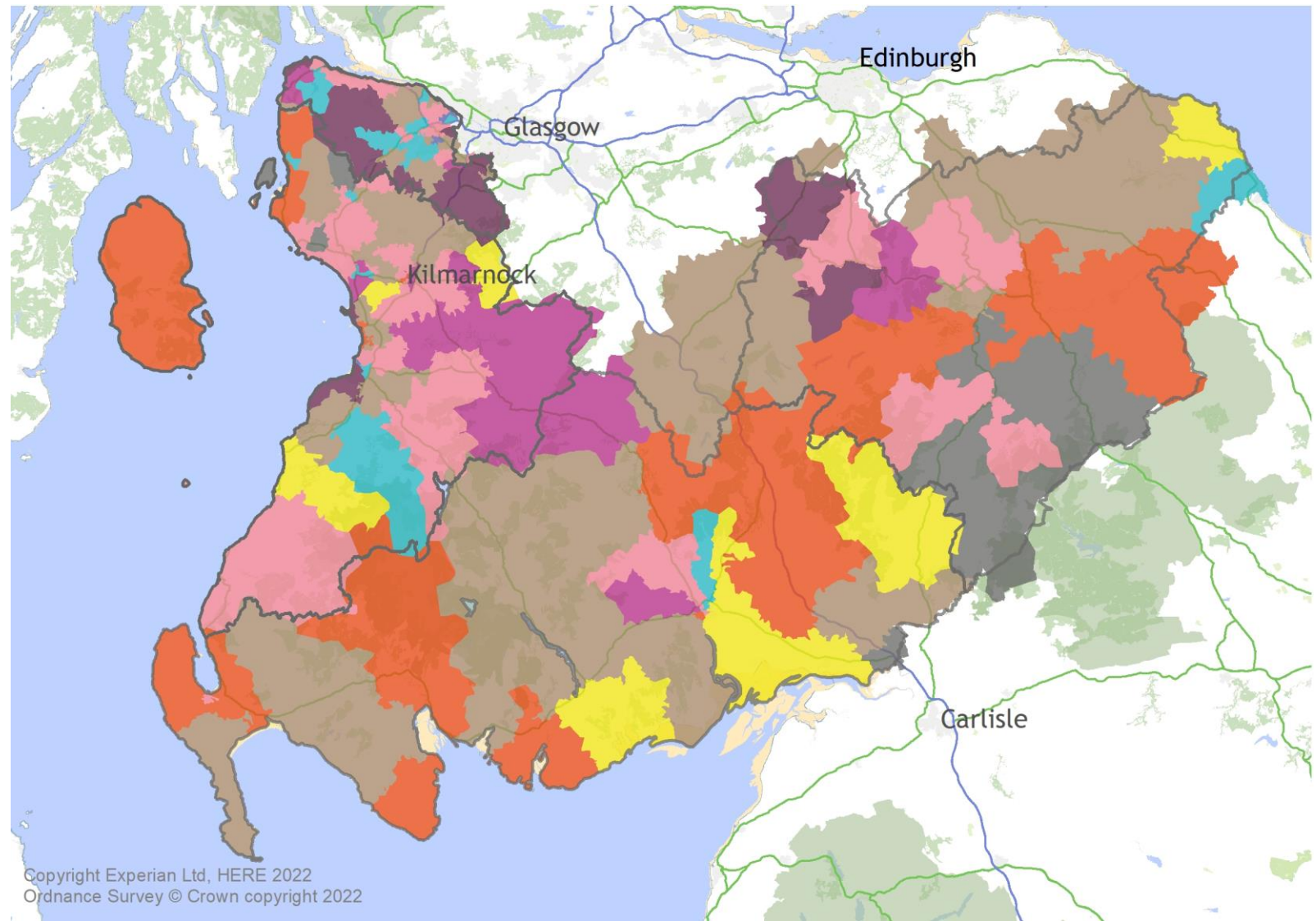
# Where do Kaleidoscope Creativity live?



# Dominant Audience Spectrum Segment by Postal Sector - Population

Dominant segment in the population

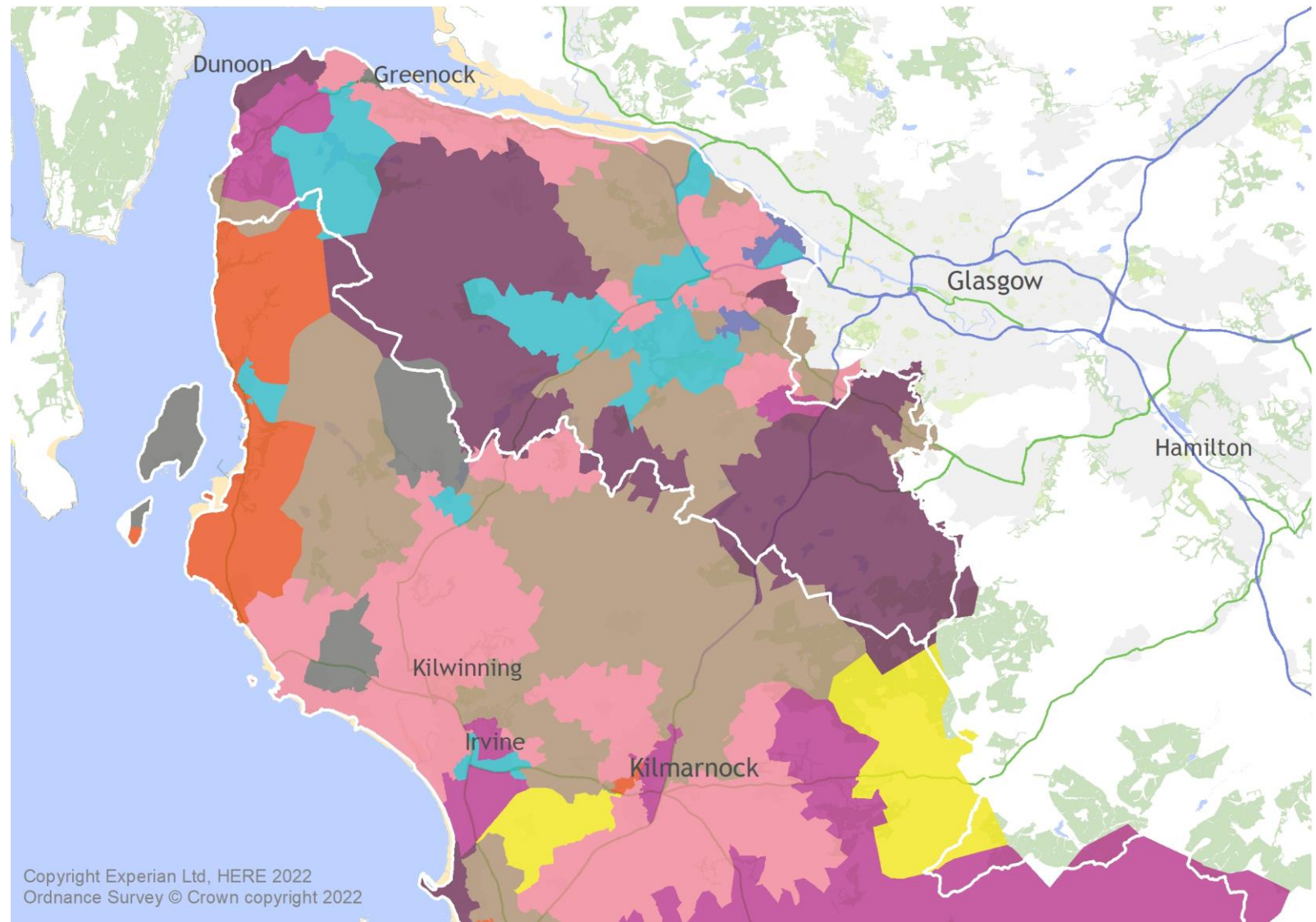
- Commuterland Culturebuffs
- Experience Seekers
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- Frontline Families
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- Supported Communities



# Dominant Audience Spectrum Segment by Postal Sector - Population

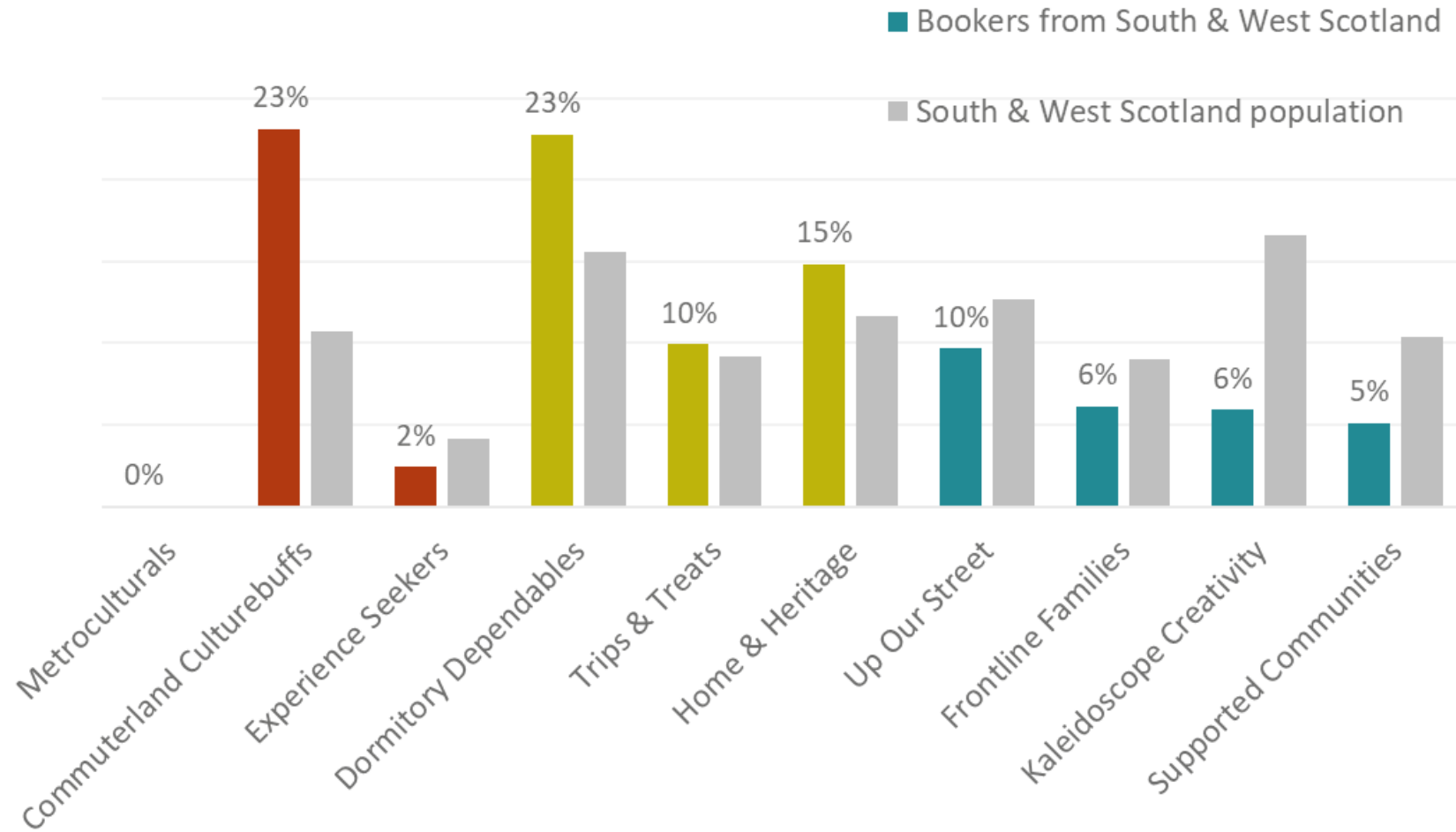
## Dominant segment in the population

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Who are the local audiences?

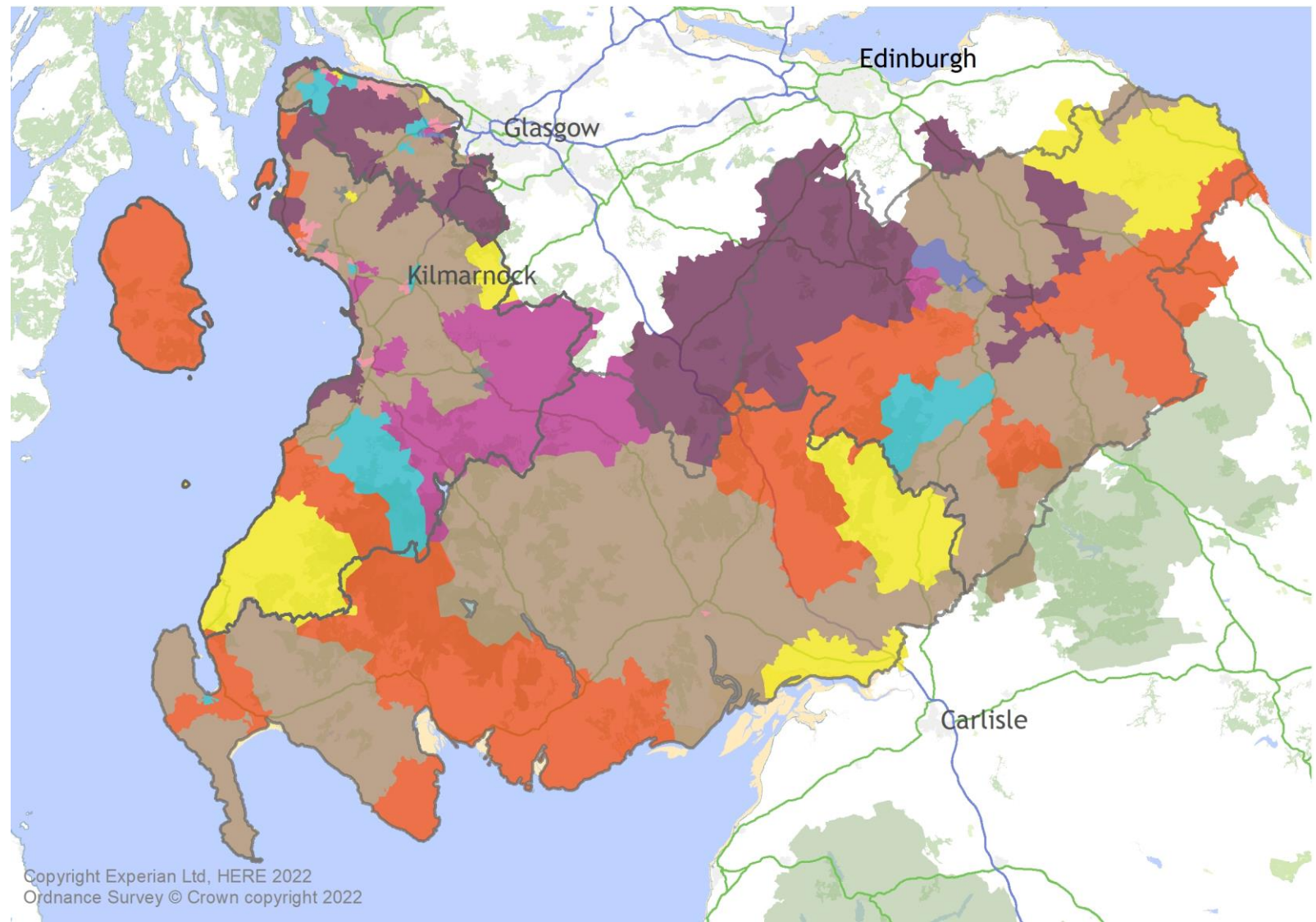
# Profile of Local Audiences



# Dominant Audience Spectrum Segment by Postal Sector - Bookers

## Dominant segment in bookers

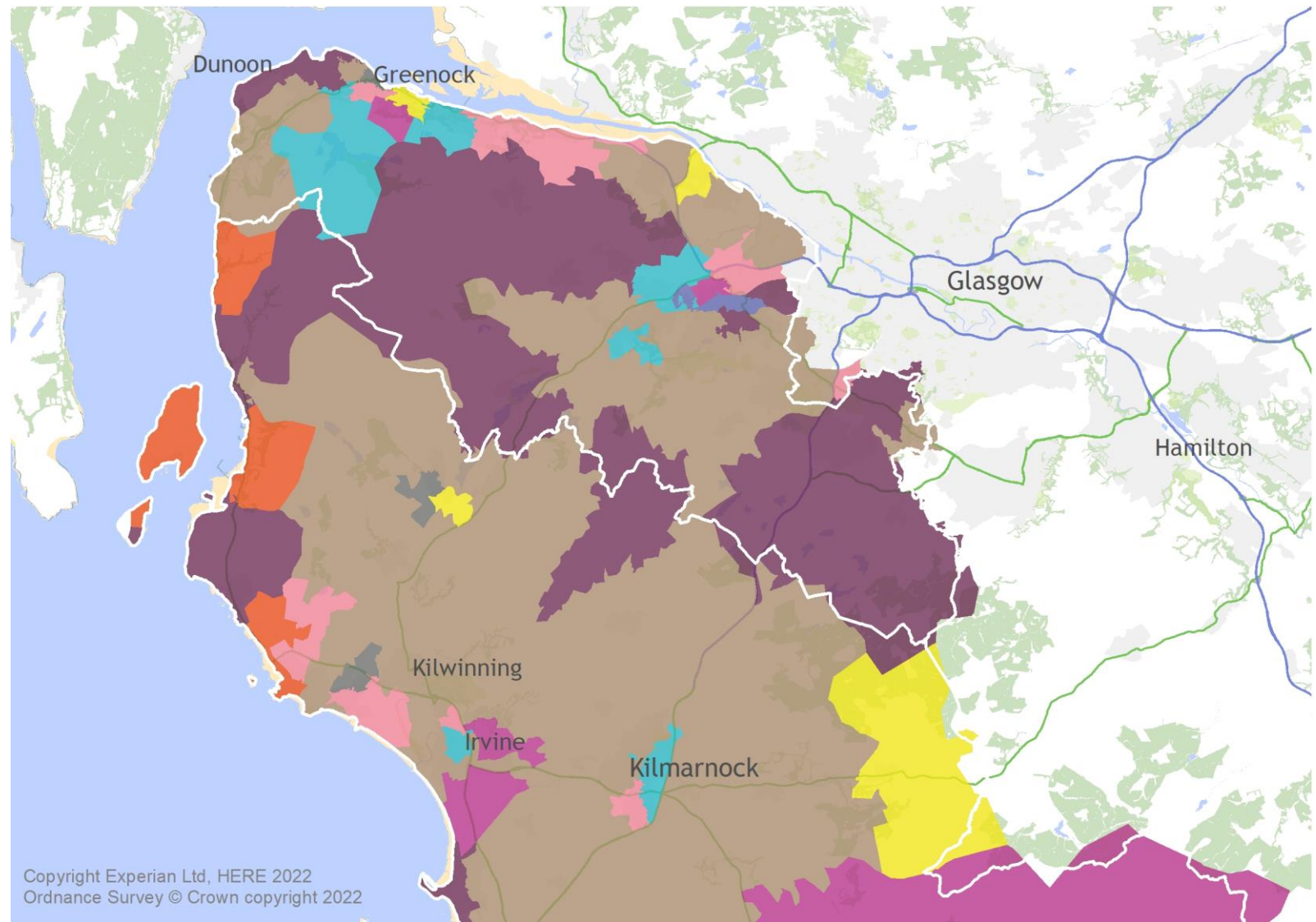
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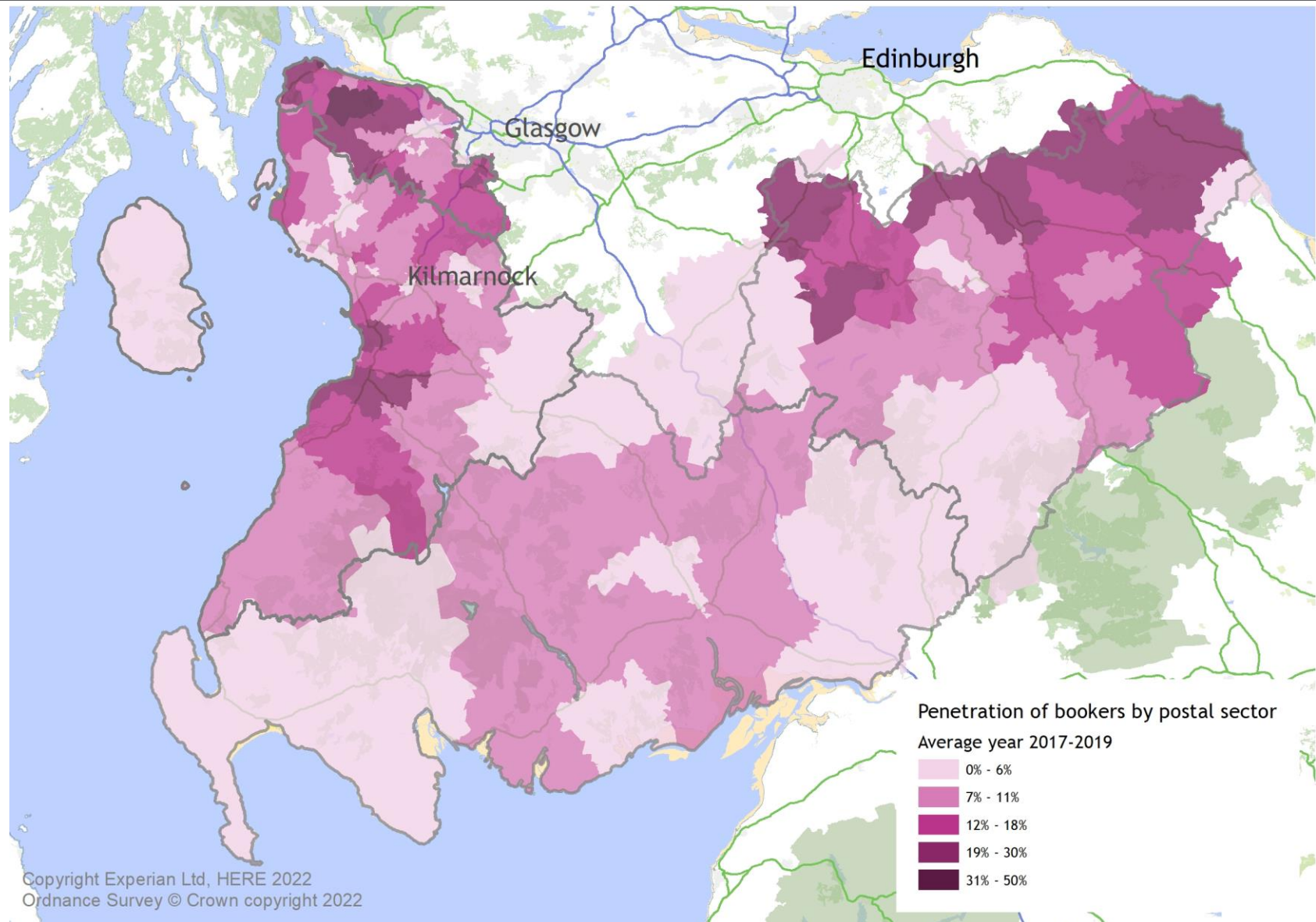
# Dominant Audience Spectrum Segment by Postal Sector - Bookers

## Dominant segment in bookers

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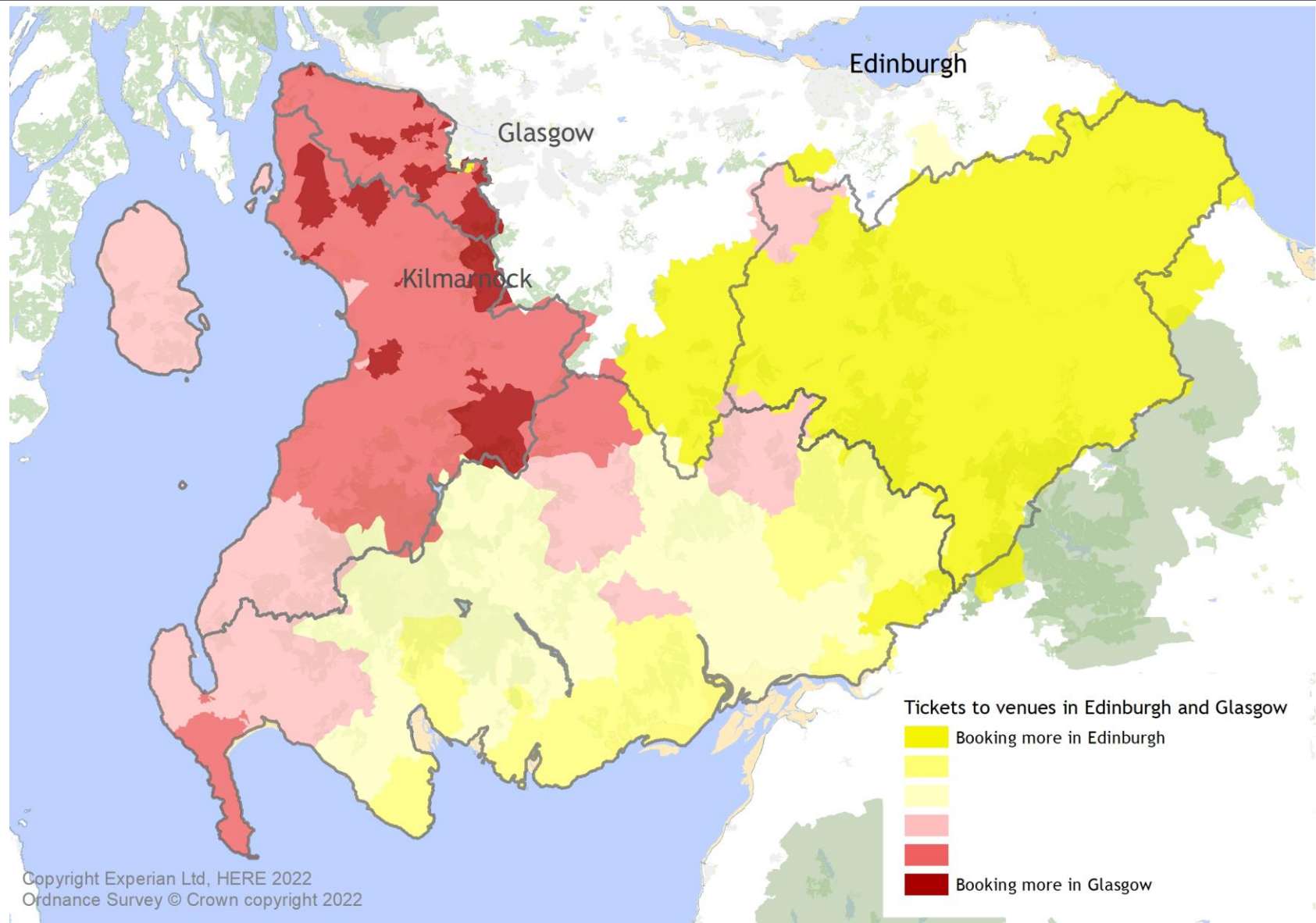


# Where do Audience Finder Bookers Live?



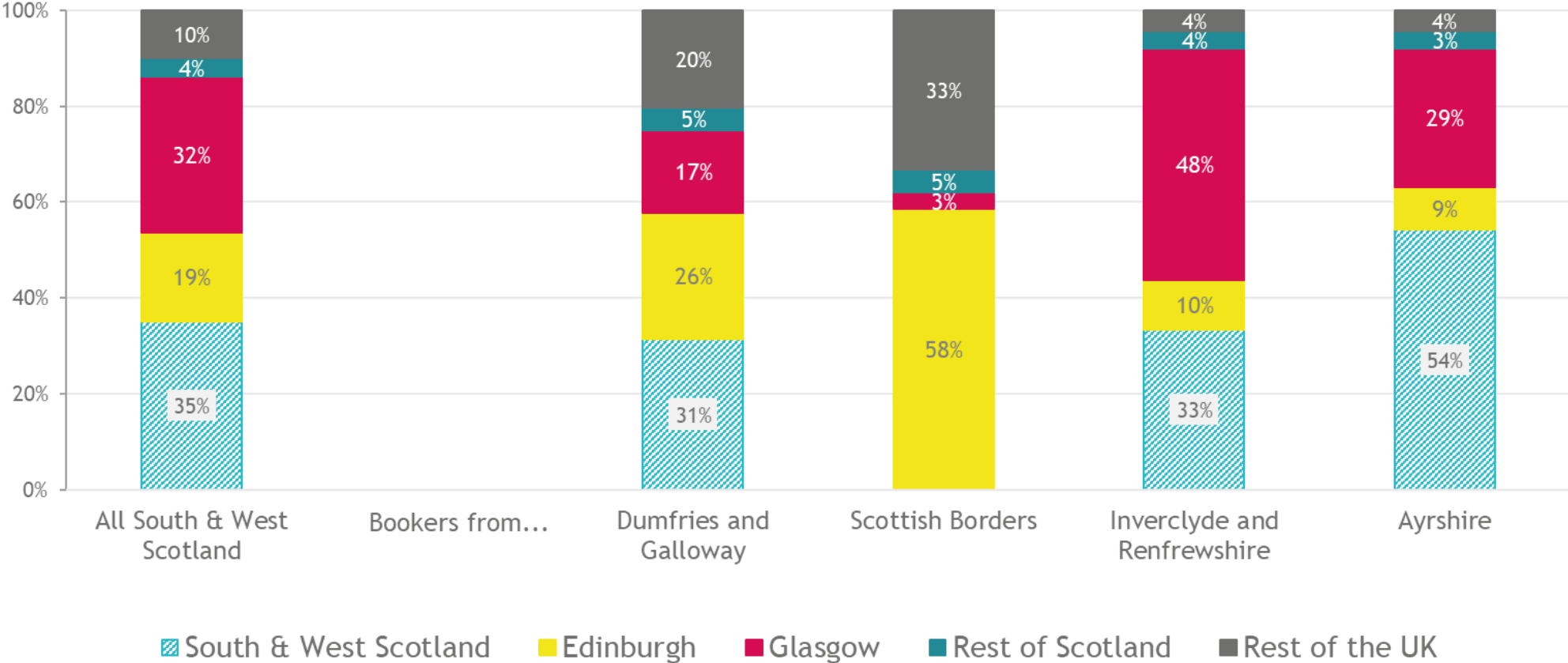


# Are Bookers Buying More Tickets to Venues in Edinburgh or Glasgow?



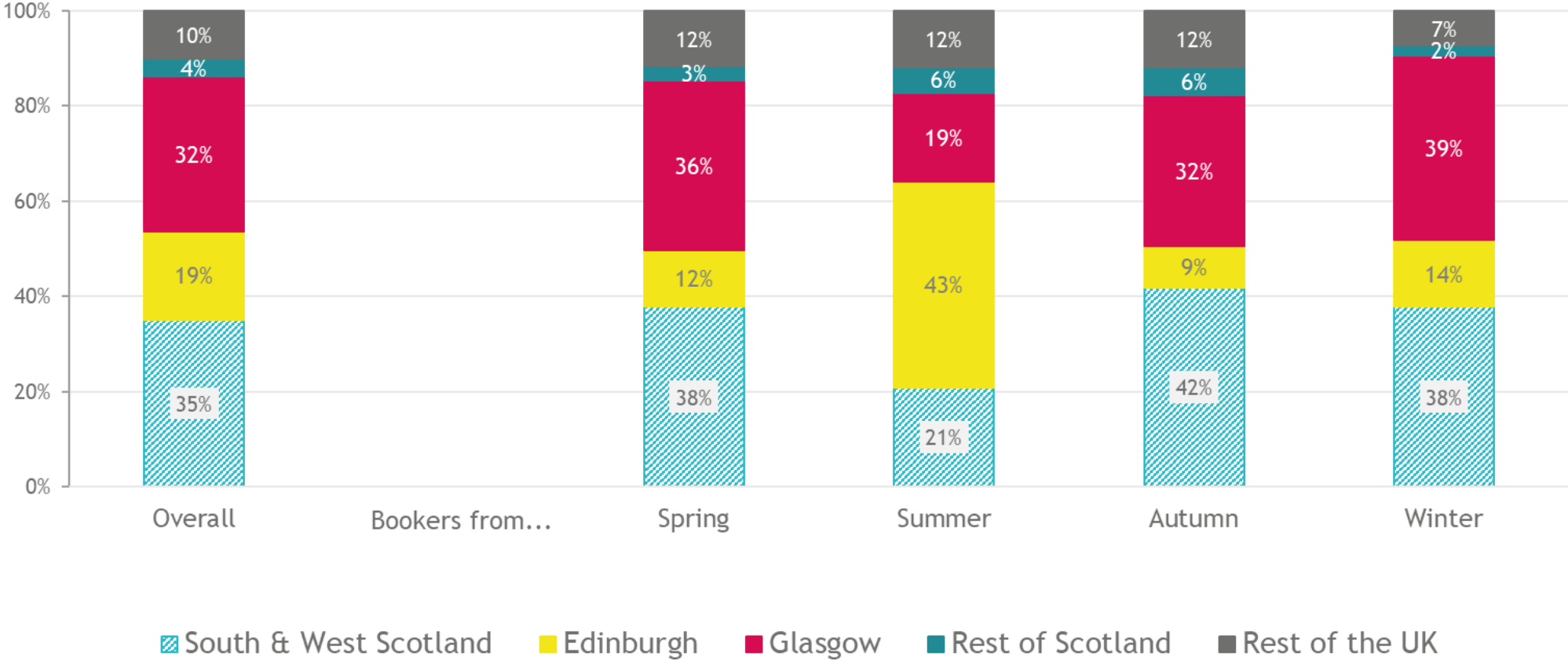
# Where Do Audience Finder Bookers Attend?

Bookers from Scottish Borders go mostly to Edinburgh and the rest of the UK. Bookers in Ayrshire stay most local.



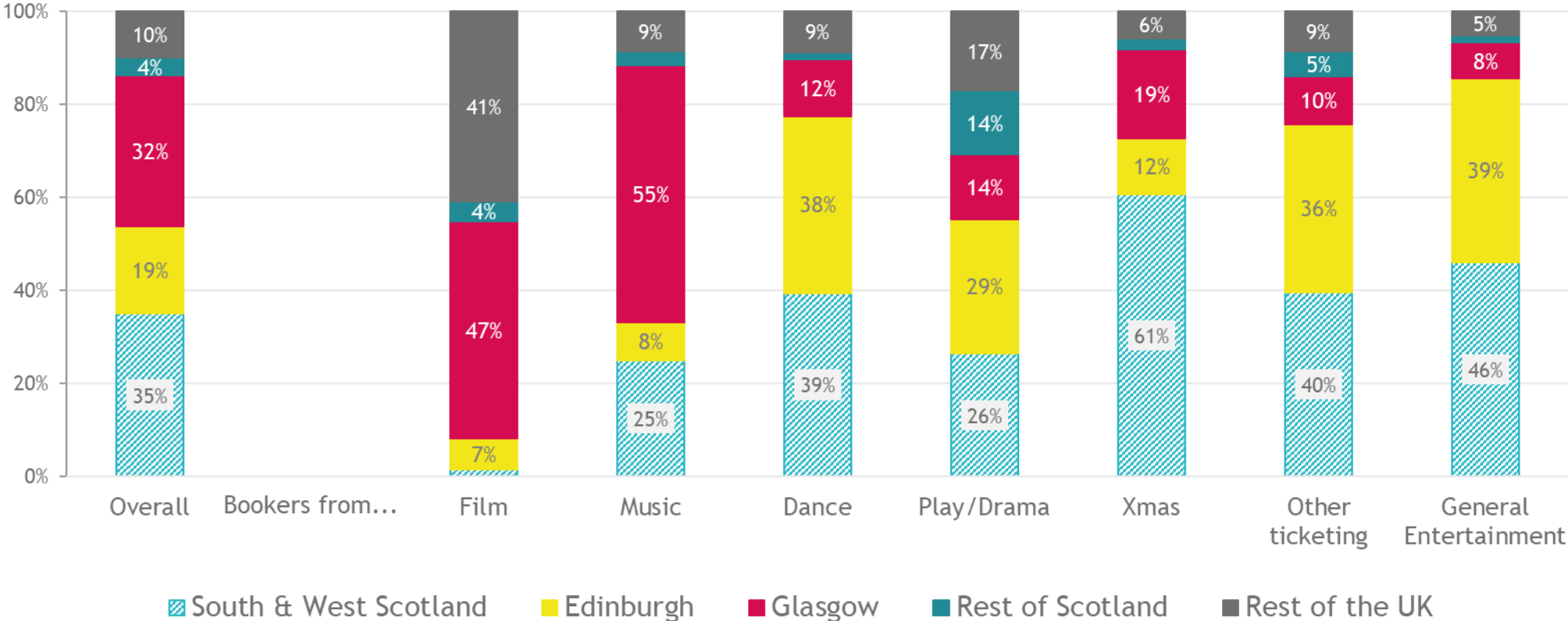
# When Do Audience Finder Bookers Attend?

The proportion of bookers booking to Edinburgh increases in the summer



# What Genres Do Audience Finder Bookers Attend?

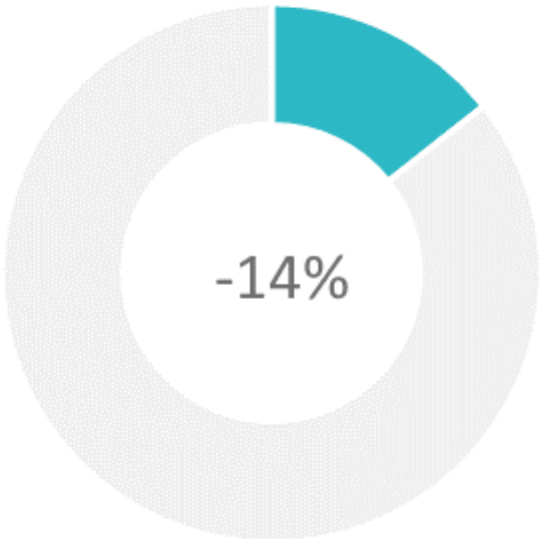
Bookers are more likely to go to Glasgow for film and music, but stay most local for Christmas shows



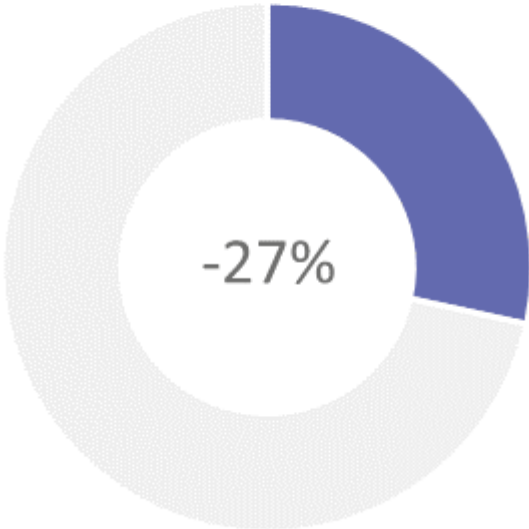
How have audiences changed?

# Change from Pre-Covid Benchmark

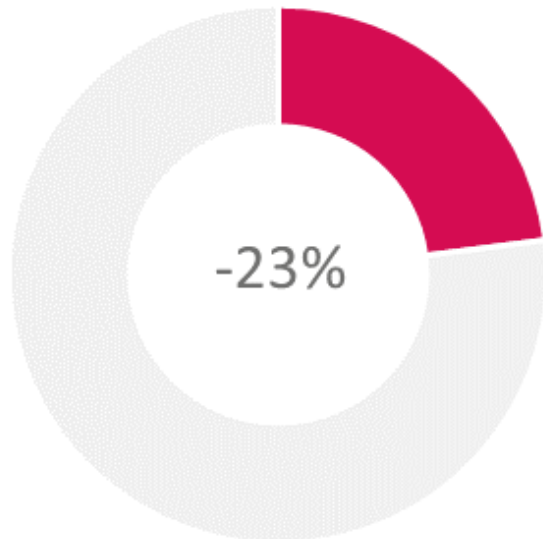
Local bookers - Drop in Bookers



Local bookers - Drop in Tickets

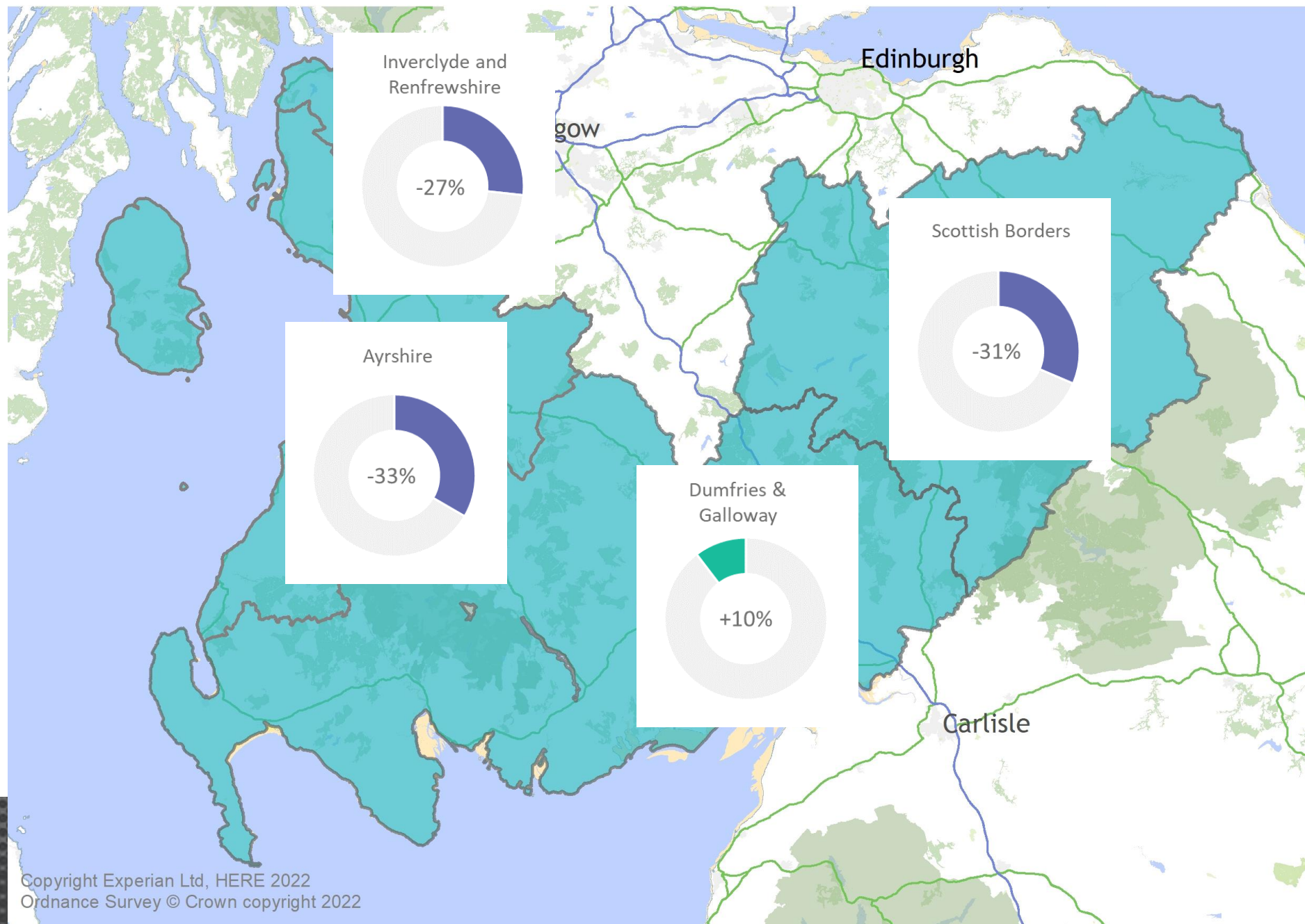


Local bookers - Drop in Income

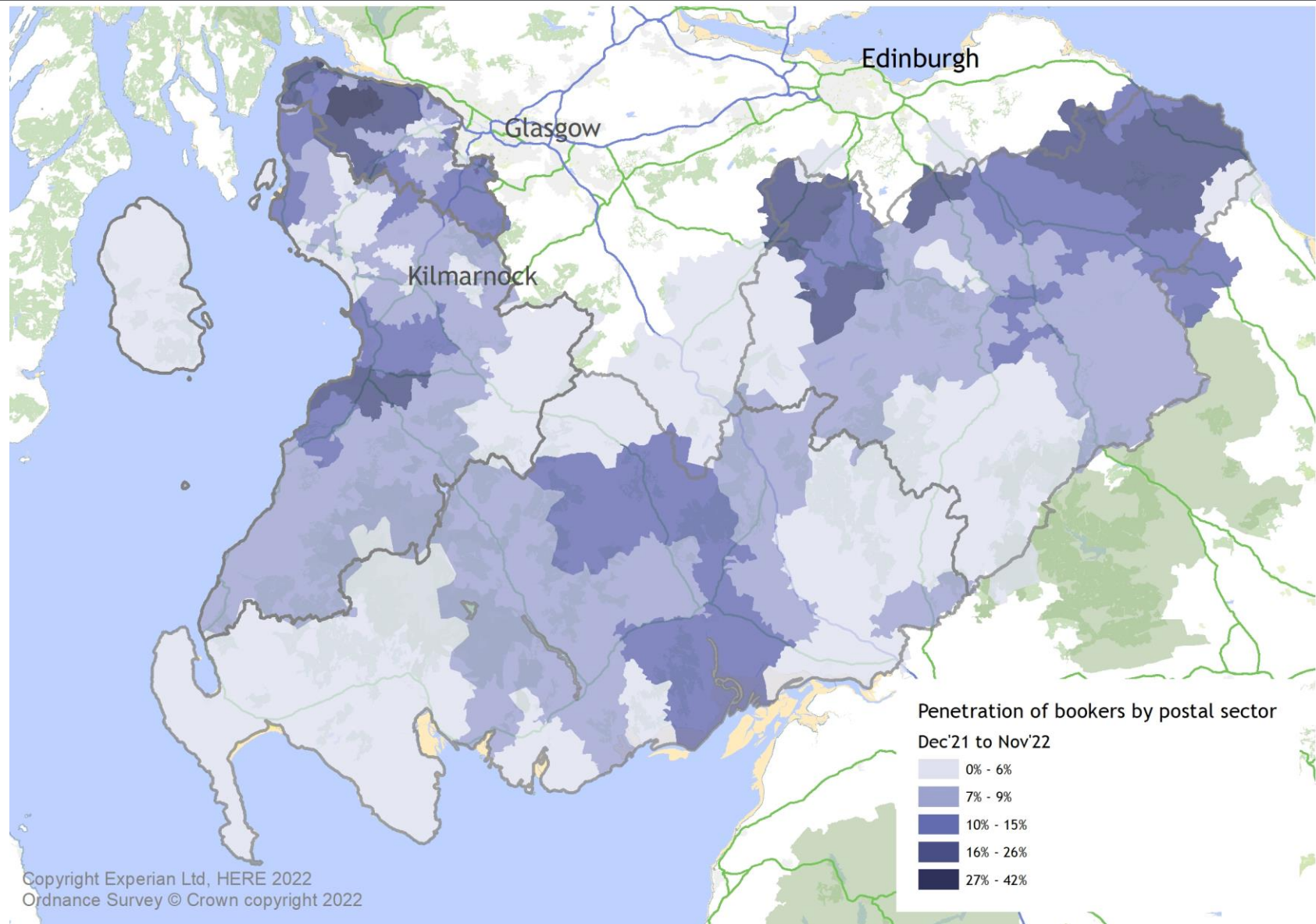


Pre-Covid Benchmark: average of 2017/18, 2018/19 and 2019/20 financial years  
Change measured against the last 12 months of available data: Dec'21 to Nov'22

# Change from Pre-Covid Benchmark: Tickets Issued by Area

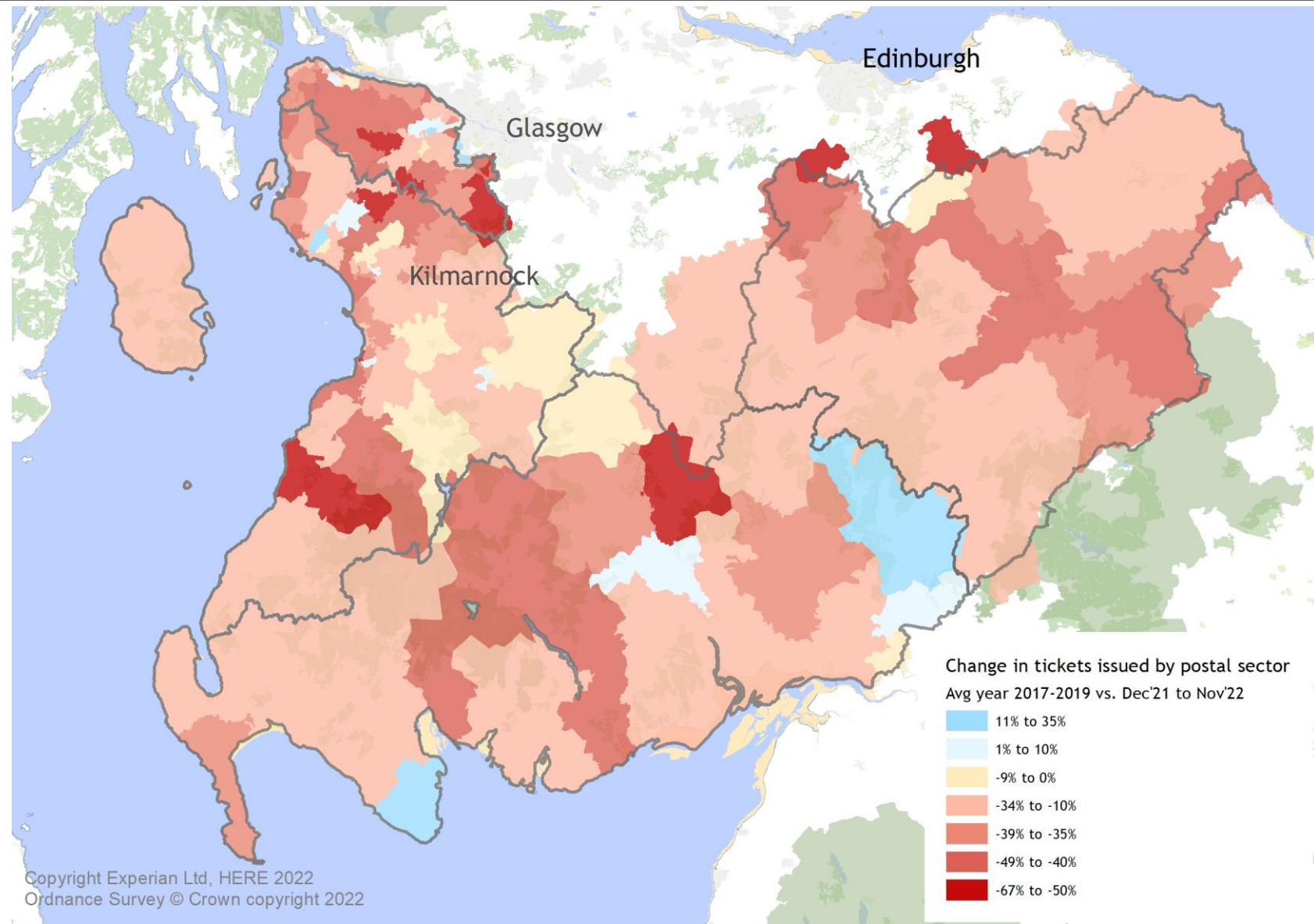


# Where do Audience Finder Bookers Live? In the Last 12 Months

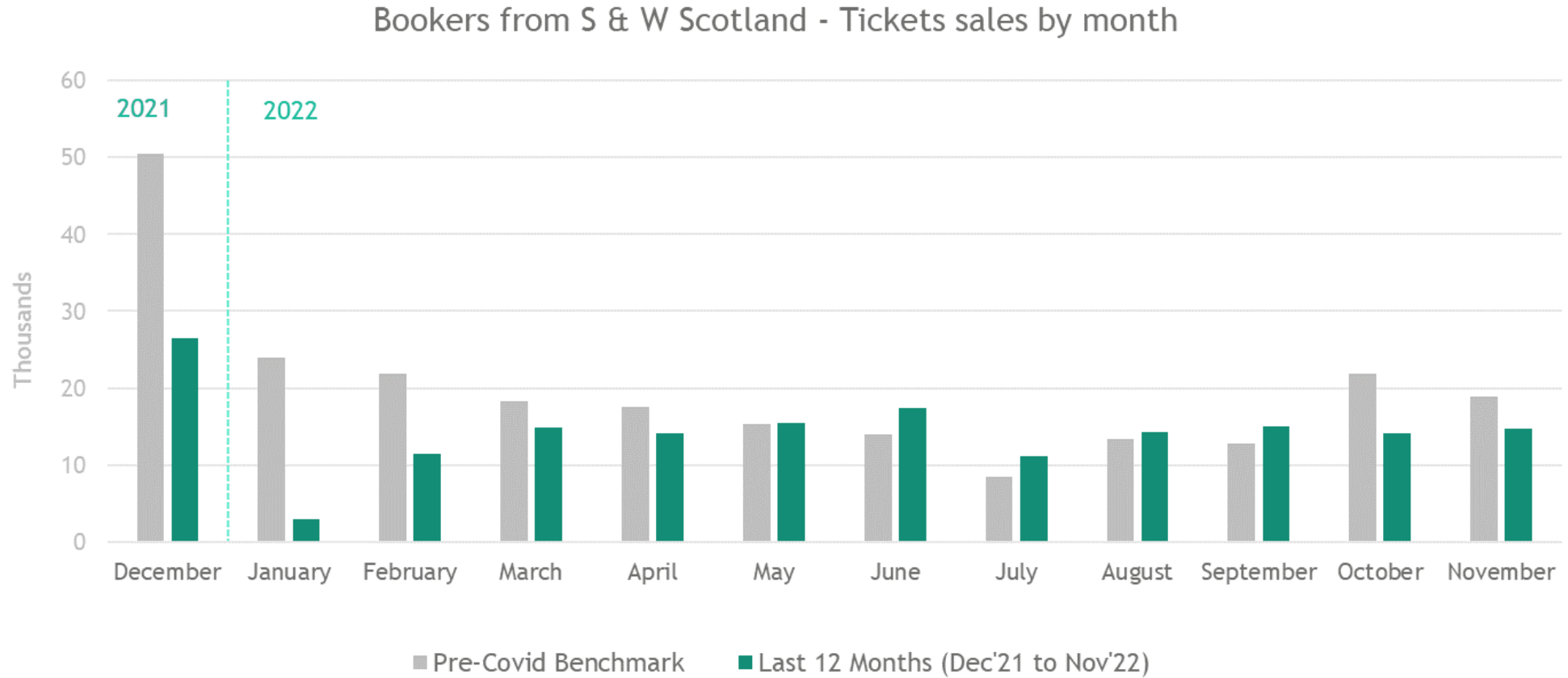




# Change from Pre-Covid Benchmark: Tickets Issued by Postal Sector



# Change from Pre-Covid Benchmark: Tickets Issued by Month



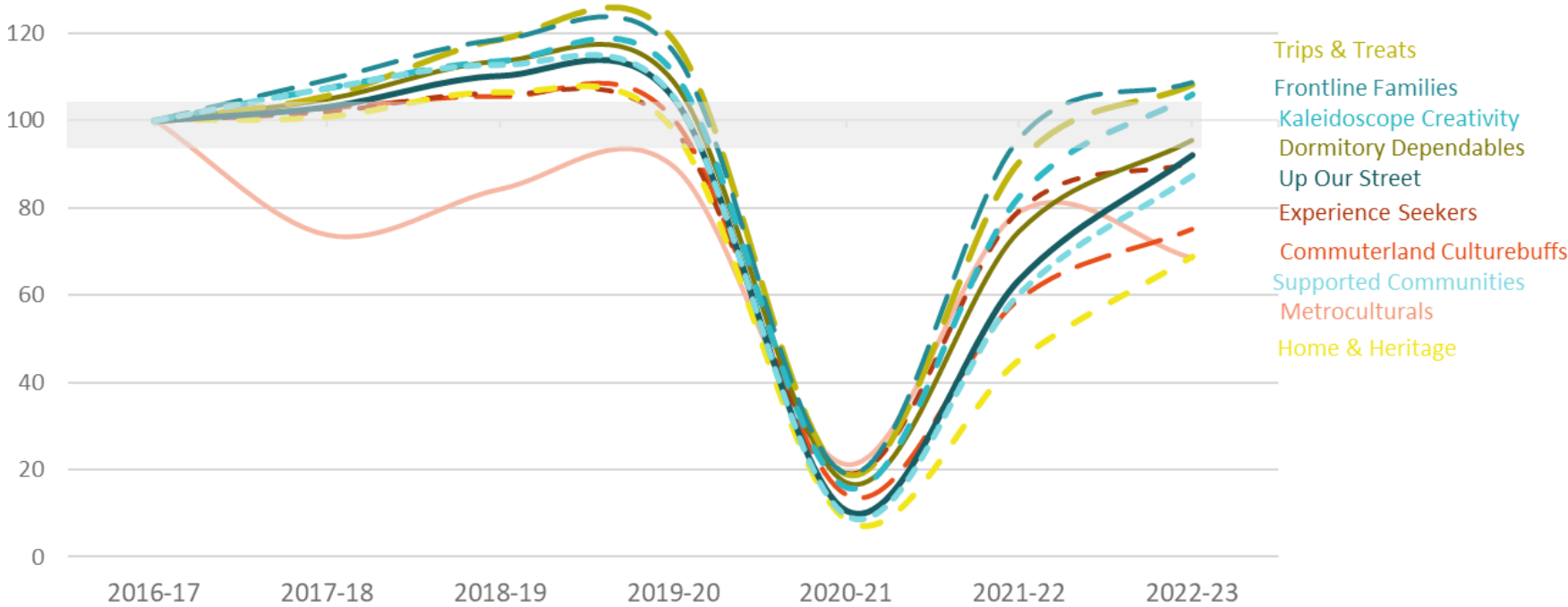
# Change from Pre-Covid Benchmark: Audience Spectrum Profile

Audience trend - index

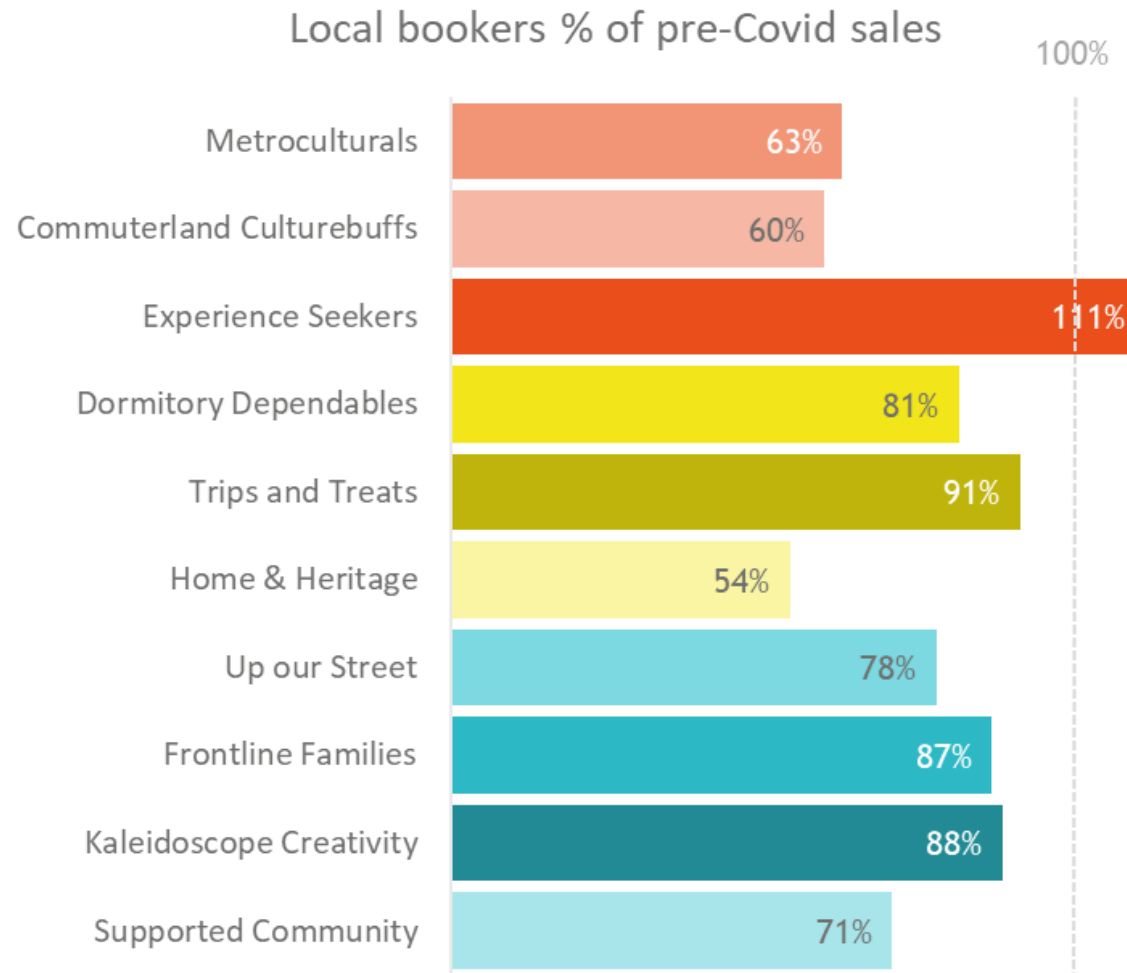
Families  
Lower/Middle  
Income



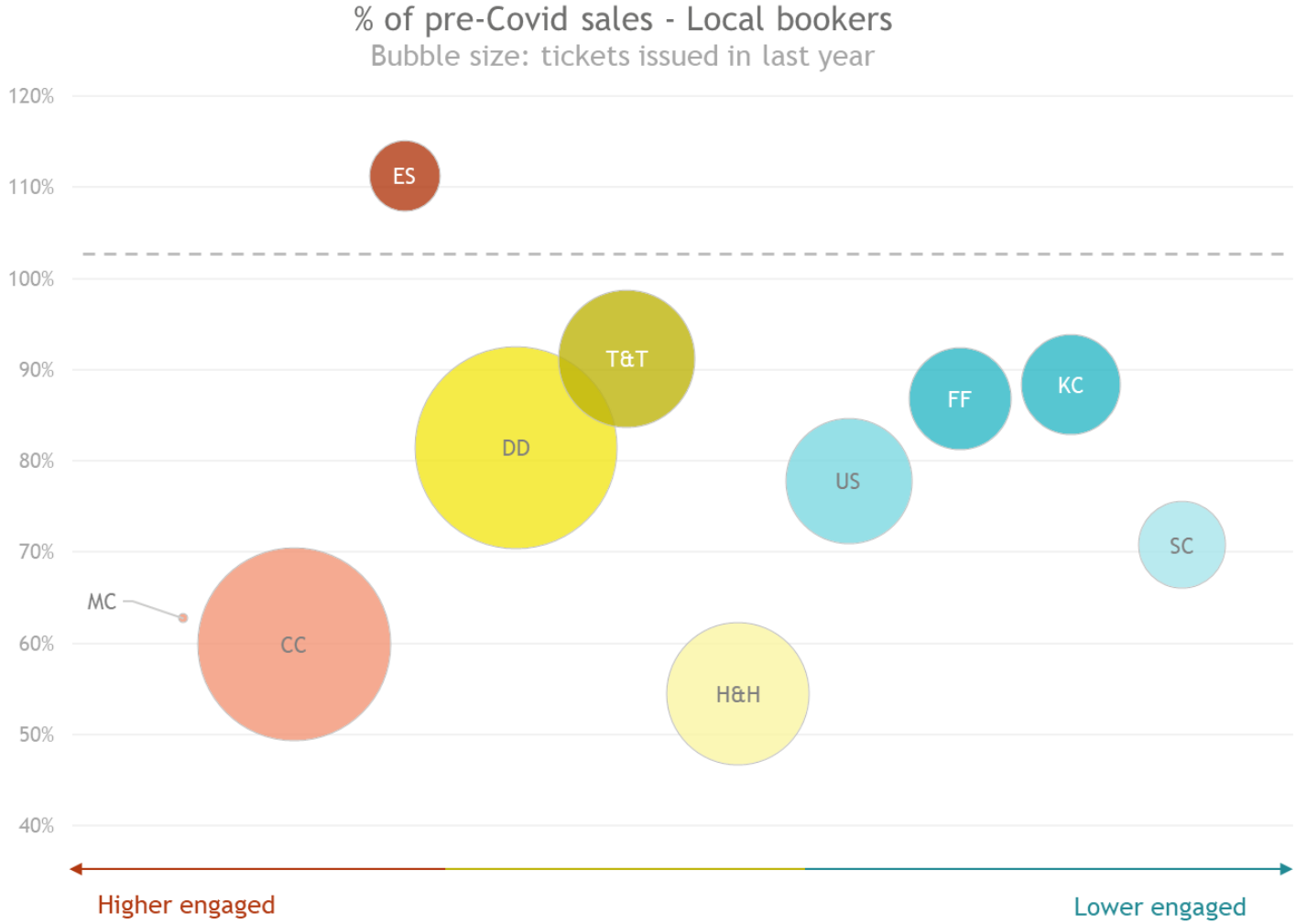
Esp. older groups



# Change from Pre-Covid Benchmark : Audience Spectrum Profile



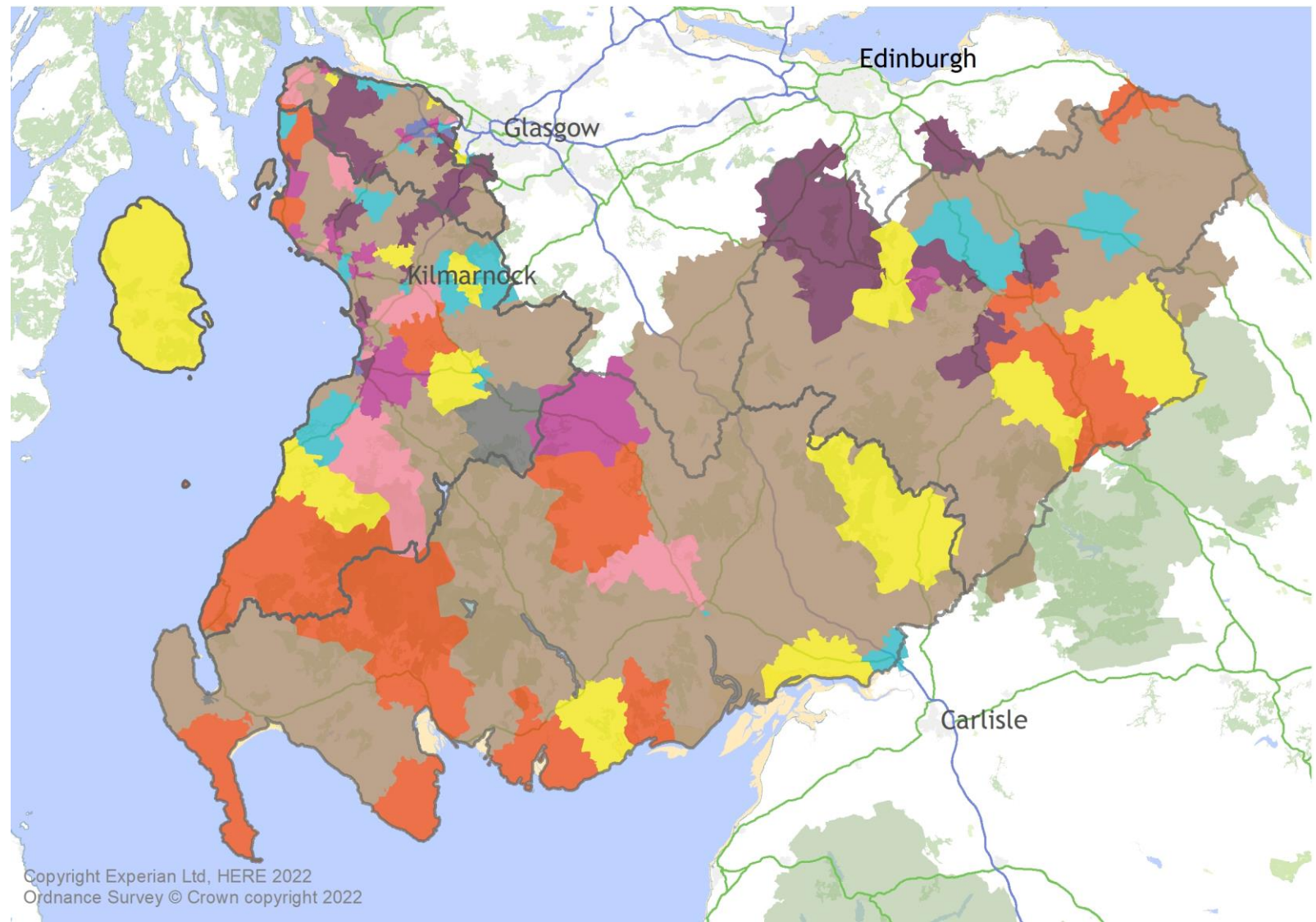
# Change from Pre-Covid Benchmark : Audience Spectrum Profile



# Change from Pre-Covid Benchmark : Audience Spectrum by Postal Sector

Dominant segment in bookers

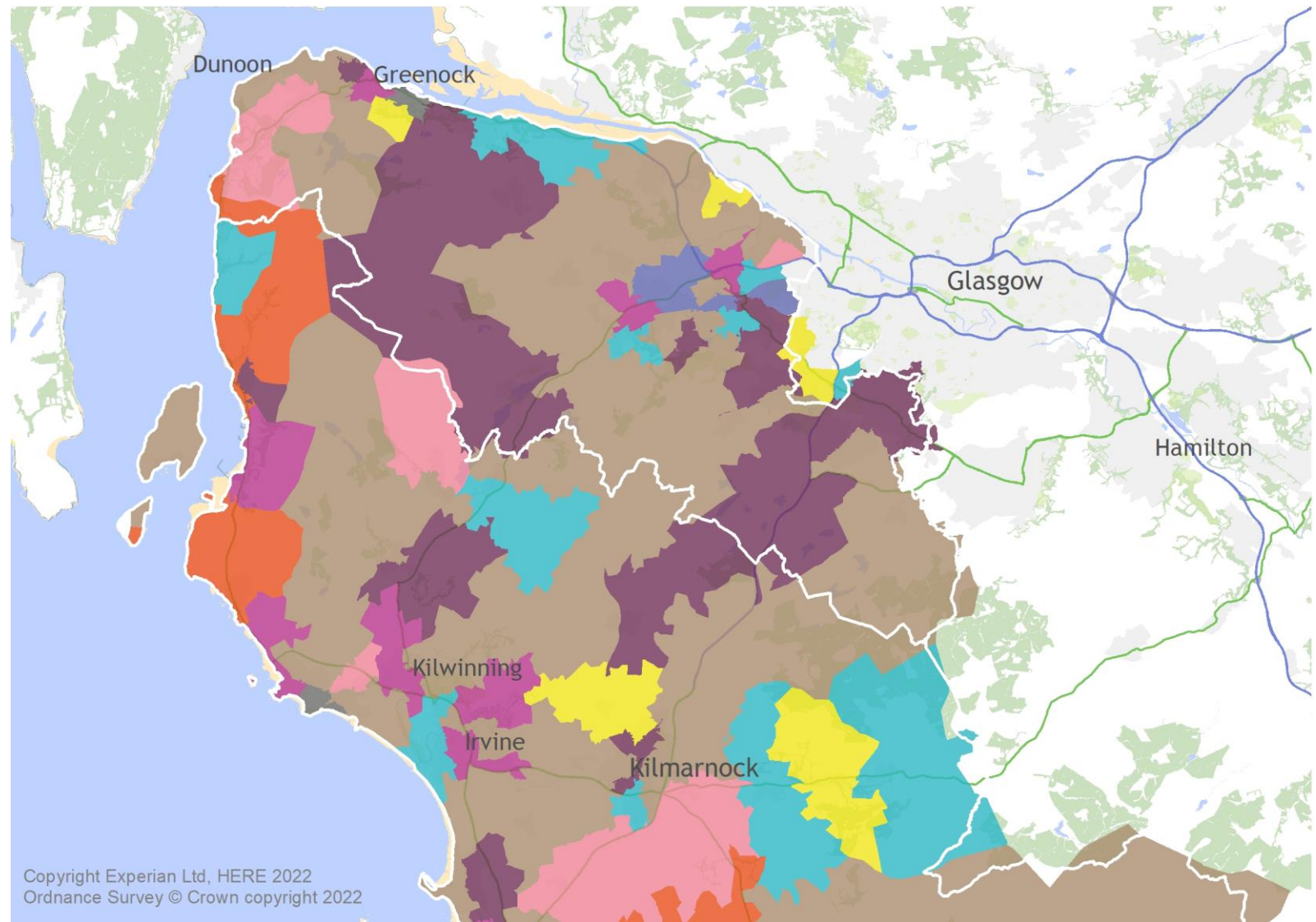
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# Change from Pre-Covid Benchmark : Audience Spectrum by Postal Sector

## Dominant segment in bookers

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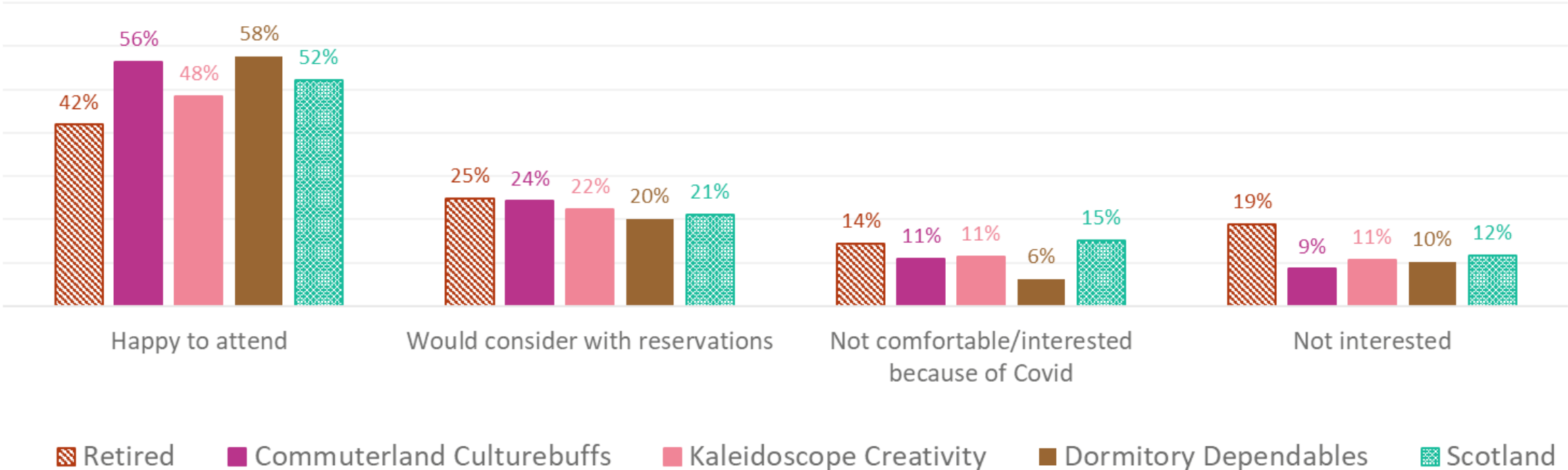


What are local audiences' views?



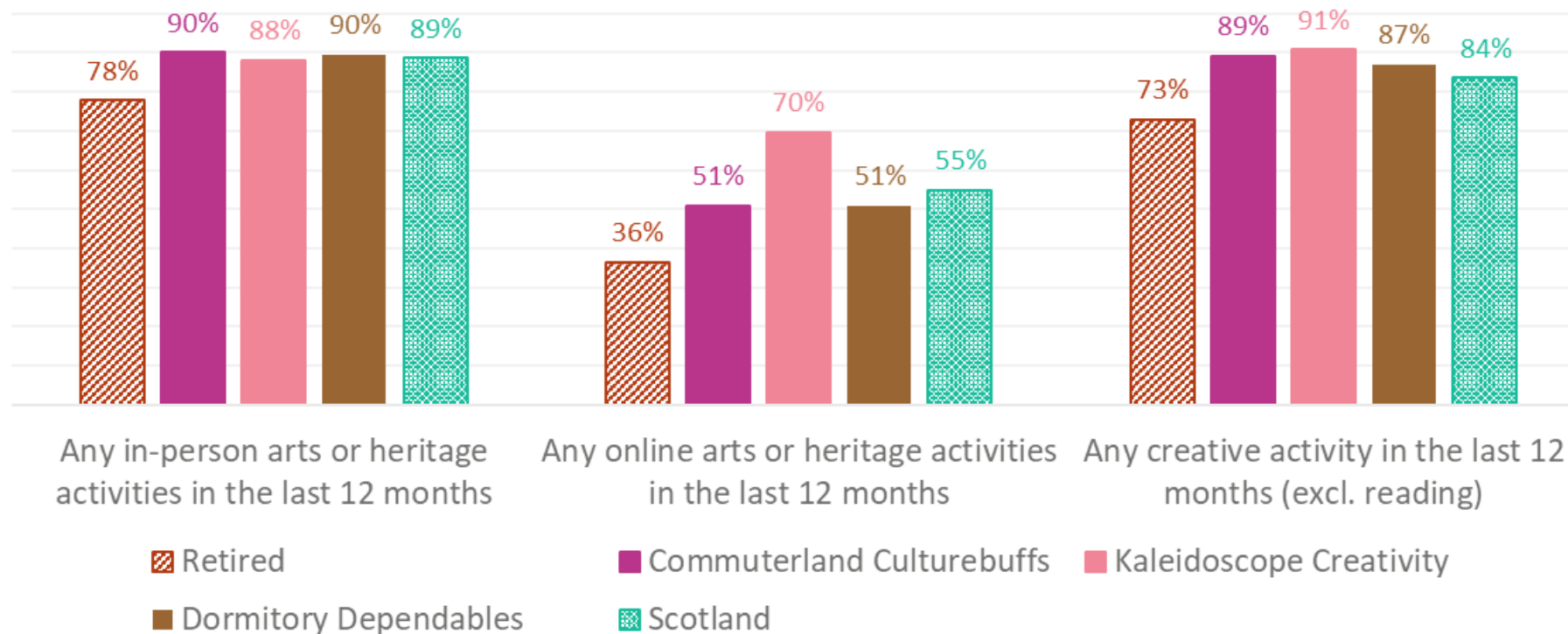
# Insights from the Cultural Participation Monitor

Willingness to attend is lower for **retirees** and higher for **Commuterland Culturebuffs**



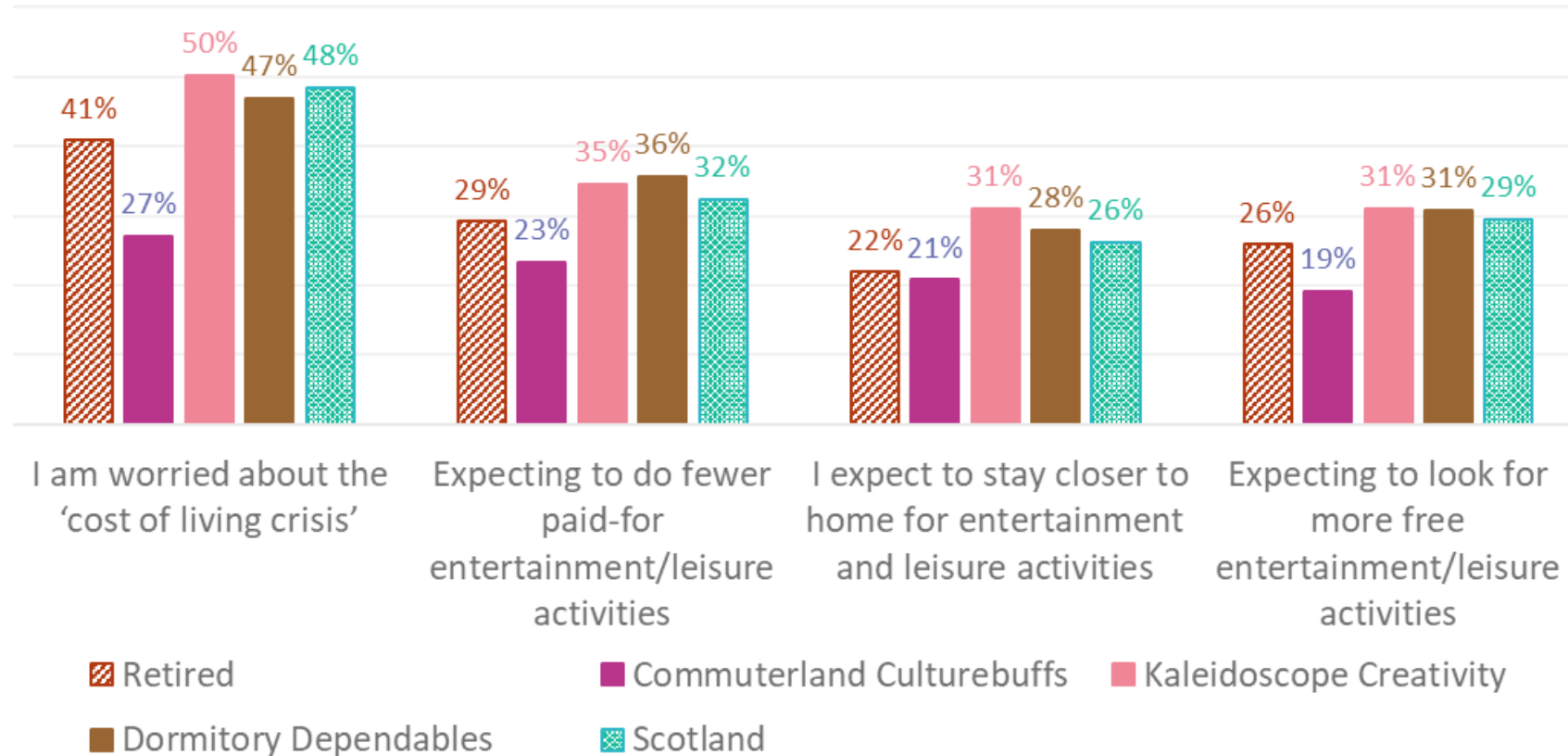
# Insights from the Cultural Participation Monitor

Retirees were less likely to have done arts/culture in-person, and Kaleidoscope Creativity were more likely to have done something creative



# Insights from the Cultural Participation Monitor

Commuterland Culturebuffs are not expecting to be as affected by the 'cost of living crisis' whilst Kaleidoscope Creativity are more worried



# Attitudes re Attending

- **Kaleidoscope Creativity** are the most likely of all segments to have attended outdoors festivals/street arts (52% cf. 41%) and children/family arts events (40% cf. 28%) in the last 12 months, but also pre-pandemic.
- **Commuterland Culturebuffs** are most likely to think it's time to 'live normally' with the risks of Covid-19 (32% cf. 26%).
- **Dormitory Dependables** are most likely to be happy to attend (58% cf. 52%), but this is closely followed by **Commuterland Culturebuffs** (56% cf. 52%).
- 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-19.

What are the implications?

## In Conclusion...?

- Area high for Home & Heritage (all except Inverclyde & Renfrewshire [I&R], esp. in Dumfries & Galloway [D&G]) - the segment down most post-Covid (prev. 15% of bookers)
- Also high for lower engaged (esp. Ayrshire - and there, esp. Kaleidoscope Creativity).
- Lower Experience Seekers - the one segment attending at higher-than-previous levels.
- Overall, wealthier groups seem to skew older, less wealthy ones younger.

### From the discussion:

- The data presented broadly matched the experience of organisation on the ground.
- The shifting audiences e.g. older audiences being slower to return, raises questions over programming changes, such as afternoon shows vs. evening shows.
- Someone familiar with the Scottish Borders agreed that people tend to go to Edinburgh over Glasgow (and less into England), partly due to train connections with Borders Rail.
- Some venues are finding an increase in international visitors and continuing popularity of online events, which could be due to lingering Covid-19 hesitancy.

## In Conclusion...?

- I&R higher for Commuterland Culturebuffs: >1/3 of population CC or Dormitory Dependables.
- CC & DD 46% of pre-Covid sales: challenge re post-Covid (and maybe older group sales were vulnerable before?) - but future opportunities?
- CC less vulnerable to cost of living and still 'happy to attend', despite sales. Their behaviour could be key...
- Drop in sales like overall, exc. Dumfries; sales rebounded, but only May-Sept...

### From the discussion:

- Venues covering Glasgow and Edinburgh reported that their Glasgow audiences were down more than Edinburgh audiences, particularly for those travelling in from further afield: this could be due to transport and parking issues in Glasgow.
- There was interest in more research on the change in access to venues (particularly those owned by local authorities) and how this has impacted attendance.

## In Conclusion...?

- Split between Glasgow and Edinburgh doesn't just follow where is closest: nearer to LA splits (e.g. D&G to Edinburgh)
- Some substantial cross-border attending (from Scottish Borders).



# 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](mailto:oliver.mantell@theaudienceagency.org)
- NB Scottish version of the survey

## Future:

- TEA Breaks:
  - (Barriers to Engagement - 25/2)
- Audience Finder groups
- ‘Know your community’ free surgeries
- In Practice sessions
- Skillsets
  - Co-creating Evaluation with Community Participants (22/2)
  - Digital Marketing Essentials (2/3)
- Community Forum Live
  - Collecting Data Effectively (23/2)

# Thank you

Please get in touch: [theaudienceagency.org](http://theaudienceagency.org)  
[oliver.mantell@theaudienceagency.org](mailto:oliver.mantell@theaudienceagency.org)

 the audience agency