the audience agency

Creative Scotland

Pre-COVID Audience Baseline Report

From Audience Finder

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Nov 2021

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Key Findings

Overall Profile

- As would be expected, those segments that are typically higher engaged were over-represented in the booking data from venues and those that are typically lower engaged were under-represented. This was true across all regions, although the trend was less pronounced in the Highlands and Islands.
- The the most notable change over time (using a consistent cohort of venues) was amongst middle-engaged groups. The two with higher proportions of families – Dormitory Dependables and Trips & Treats – saw increases; the older one with lower proportions of families – Home & Heritage – saw a progressive decrease.

Regions

- The Highlands and Islands have a notably different profile and booking behaviour (a broader social mix, higher frequency, lower value), recognising the venues' particular roles as community hubs.
- Central and West Scotland were the regions where Regularly Funded Organisations were particularly effective at reaching typically lower-engaged audience groups, but this was mainly for Film, Children & Family and Workshop events (and not, unusually, for Outdoor Arts). These two regions also have some of the highest proportion of those lower-engaged audience groups in their population.
- South Scotland has a lower proportion of the population who've booked (5%) perhaps due to fewer venues and spill-over to venues across the border not included in this analysis. West Scotland was also below average (9%), at a similar level to the Highlands and Islands.

Sectors and Art Forms

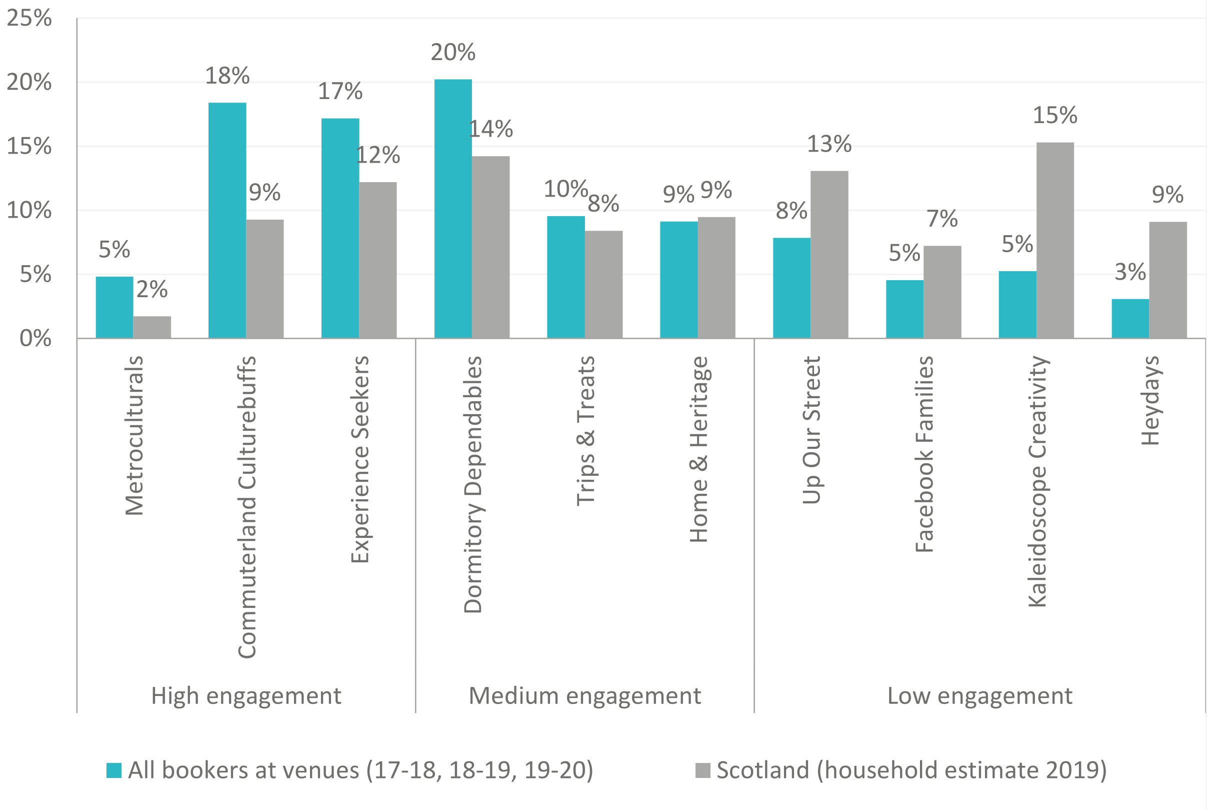
- Many of the differences in art form and sector attender profiles match those that might be expected, given segment tastes and attendance levels. The following segments had higher proportions for the following art forms:
    - Metroculturals: Outdoor Arts / Contemporary Visual Arts / Dance
    - Commuterland Culturebuffs: Traditional Visual Arts
    - Experience Seekers: Contemporary Visual Arts / Outdoor Arts
    - Dormitory Dependables: Museums and Heritage

    - Home & Heritage: Traditional Visual Arts
- All artforms selling over £100k a year (i.e. with high enough volume to avoid misleading fluctuations from small number of specific events) sold more in 2019/20 than they had in 17/18, with only two exception: Plays/Drama and Workshops
- Workshops often fluctuate substantially due to the combination of high-volume, low price and low volume, high price events in the same category.
- The decline in Plays/Drama audiences matches a similar decline across the UK.
- Film (7%) and Outdoor Arts (11%) are the only ones of the other art forms to increase less than 30%: suggesting that most art forms have far exceeded inflationary increases.
- There has been a drift towards earlier booking (counter to the usual trends)
- However, this is due to the decreasing proportion of film in the mix of events (an art form which typically books much later than others, with high levels of walk-ups)

Overall Profile

Overall profile compared to Scotland households

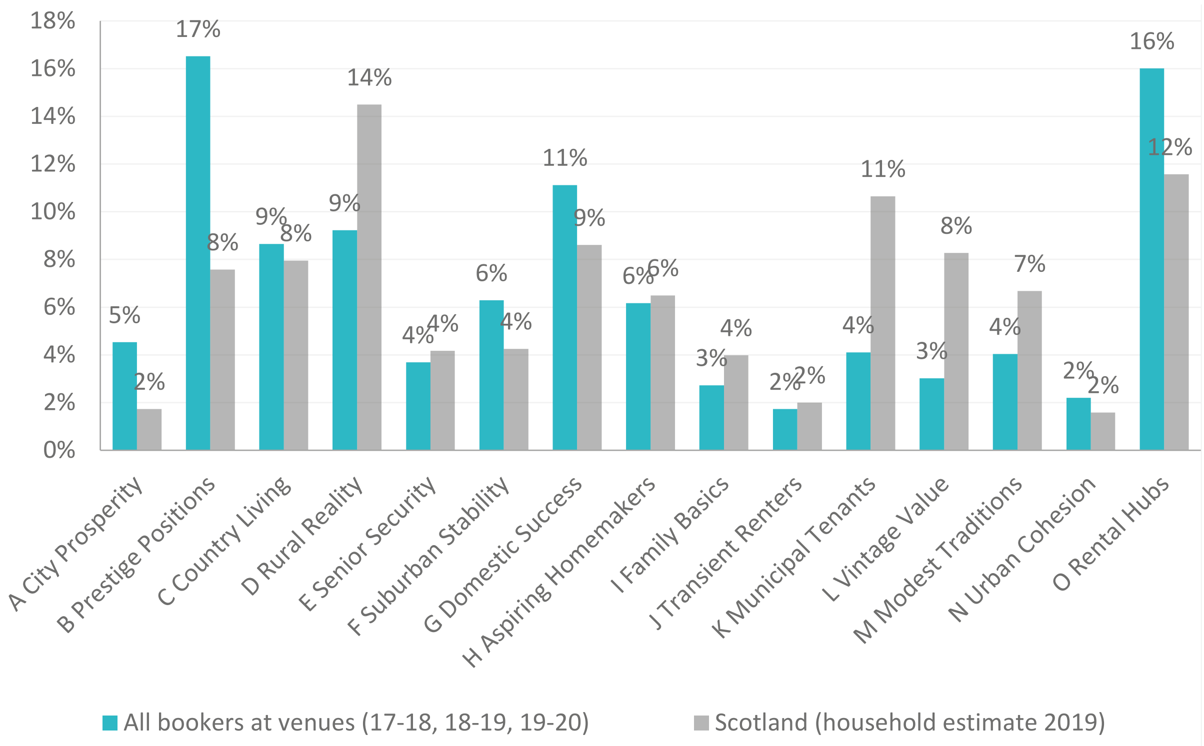
Audience Spectrum



Base: 550,467 / 2,449,276

As would be expected, those segments that are typically higher engaged were over-represented in the booking data from venues and those that are typically lower engaged were under-represented. This was particularly true of Metroculturals and Commuterland Culturebuffs, with Experience Seekers over-represented to a similar degree as the Dormitory Dependables, the most over-represented of the medium engaged groups. Under-representation in the lower engaged group was particularly pronounced for the Kaleidoscope Creativity and Heydays groups, for which the percentage of bookers was just a third of the percentage of households.

Mosaic



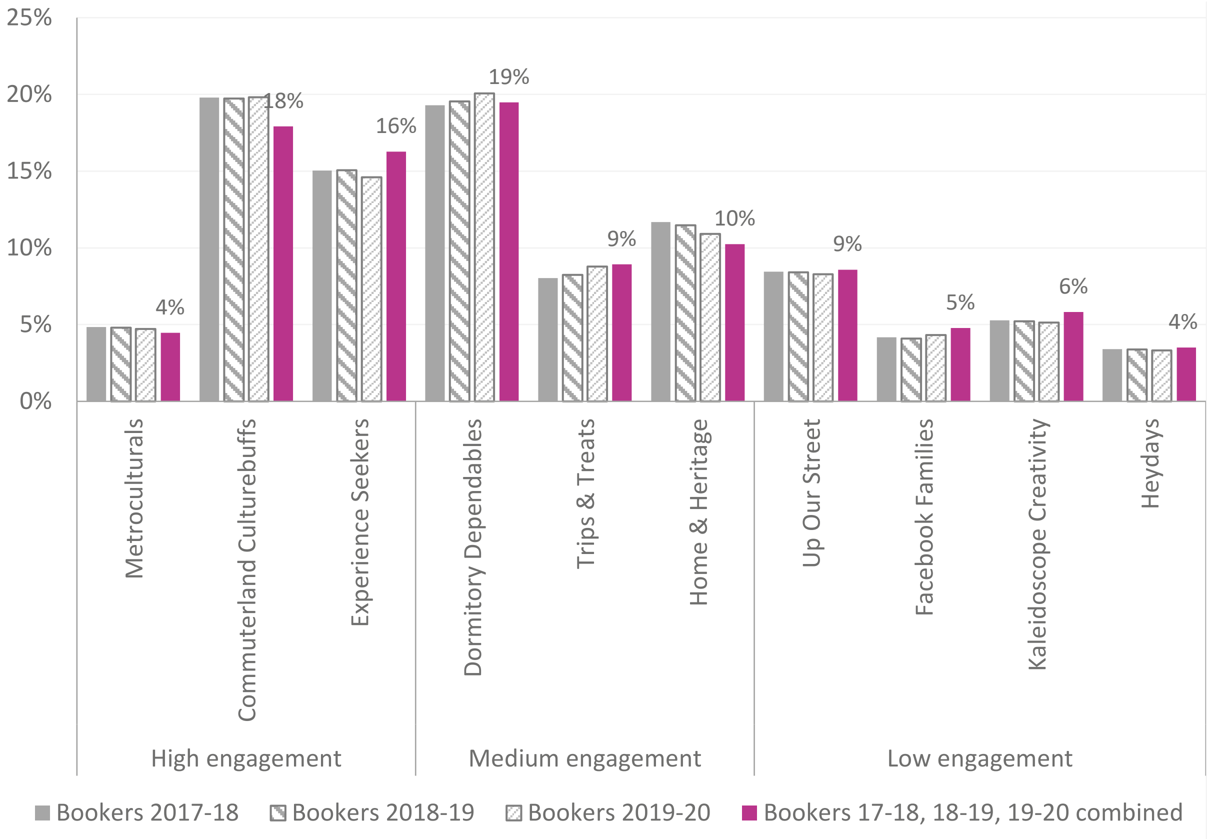
Base: 566,211 / 4,720,807

The Mosaic groups that were under-represented among bookers by the greatest margins were Municipal Tenants, Vintage Value, Modest Traditions and Rural Reality. Prestige Positions, City Prosperity, Suburban Stability and Rental Hubs were the most over-represented groups.

Year-on-year profile

Note: for any yearly analysis, we have excluded the organisations where we didn't have booking data across all three years: this was done to remove bias or misleading changes.

Audience Spectrum

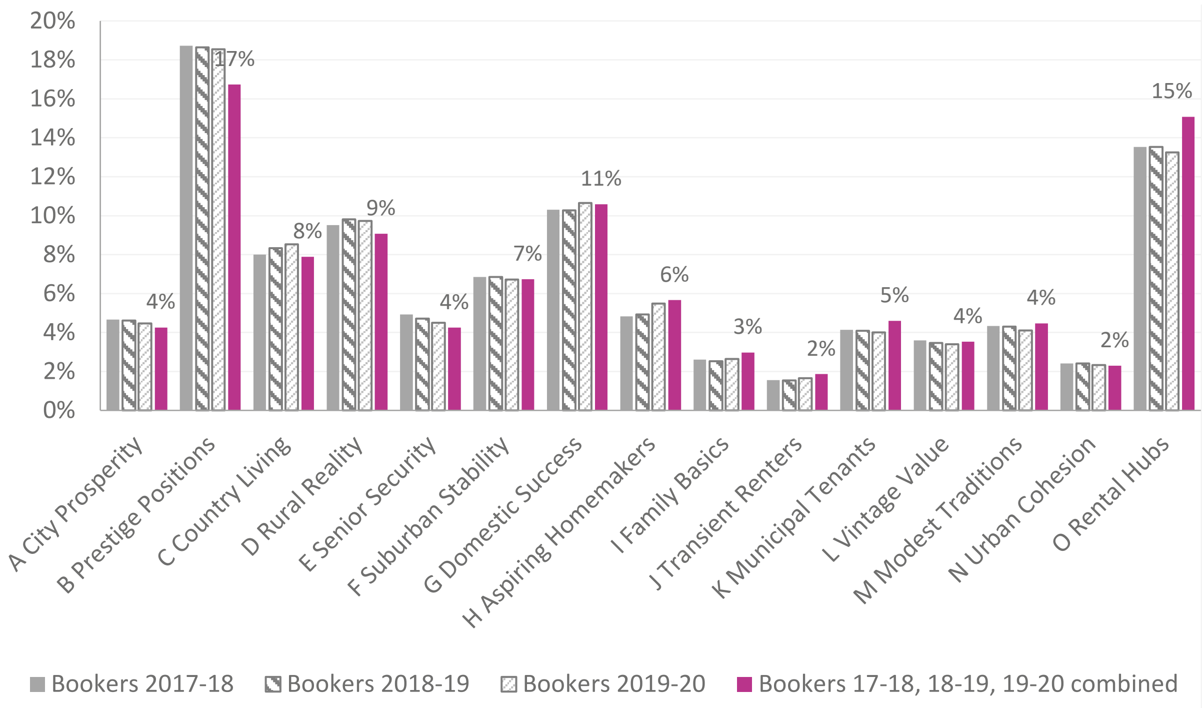


Base: 199,948 / 207,044 / 212,382 / 402,754

Bookers are deduplicated in the combined profile, which is why the base for each year doesn't add up to the combined total, and some combined segments appear higher in proportion than in the yearly profiles

The most notable change year-on-year was amongst the middle-engaged groups. The two groups with higher proportions of families — Dormitory Dependables and Trips & Treats — each saw a small increase. Meanwhile, the older group with lower proportions of families — Home & Heritage — saw a progressive decrease.

Mosaic

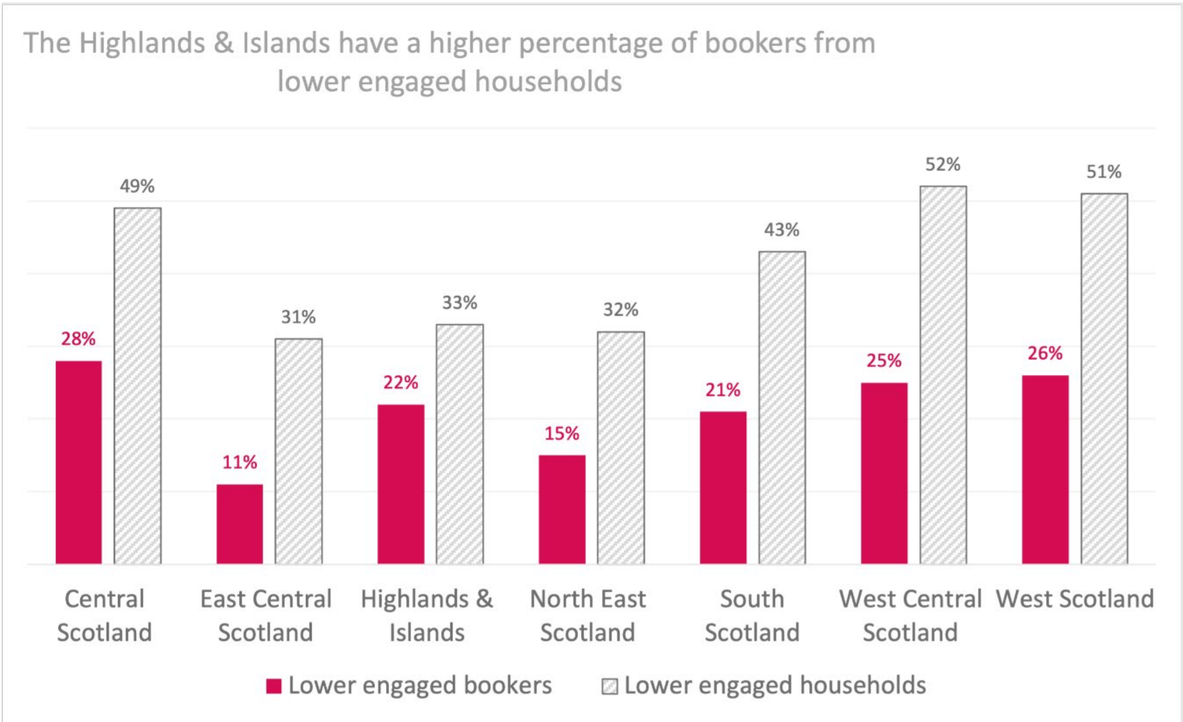


Base: 206,431 / 213,852 / 219,194 / 414,263

Among the Mosaic groups, there were small progressive increases year-on-year for the Aspiring Homemakers and Country Living group. The two groups with the largest percentage of bookers – Prestige Positions and Rental Hubs – both saw a small decline between 2017-18 and 2019-20.

Regions

The same differences between high, medium and low engagement groups could be seen across all regions. However, the trend tended to be less pronounced in the Highlands and Islands where. More analysis on why this is can be found later in the report.

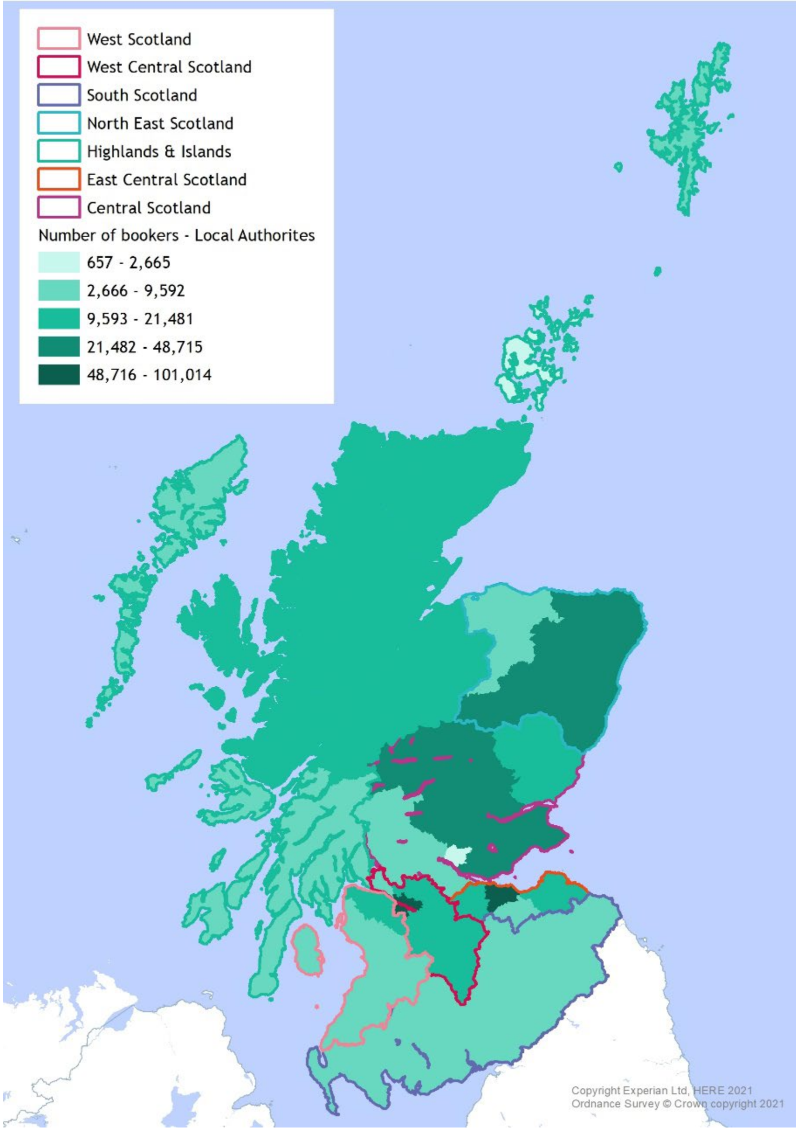


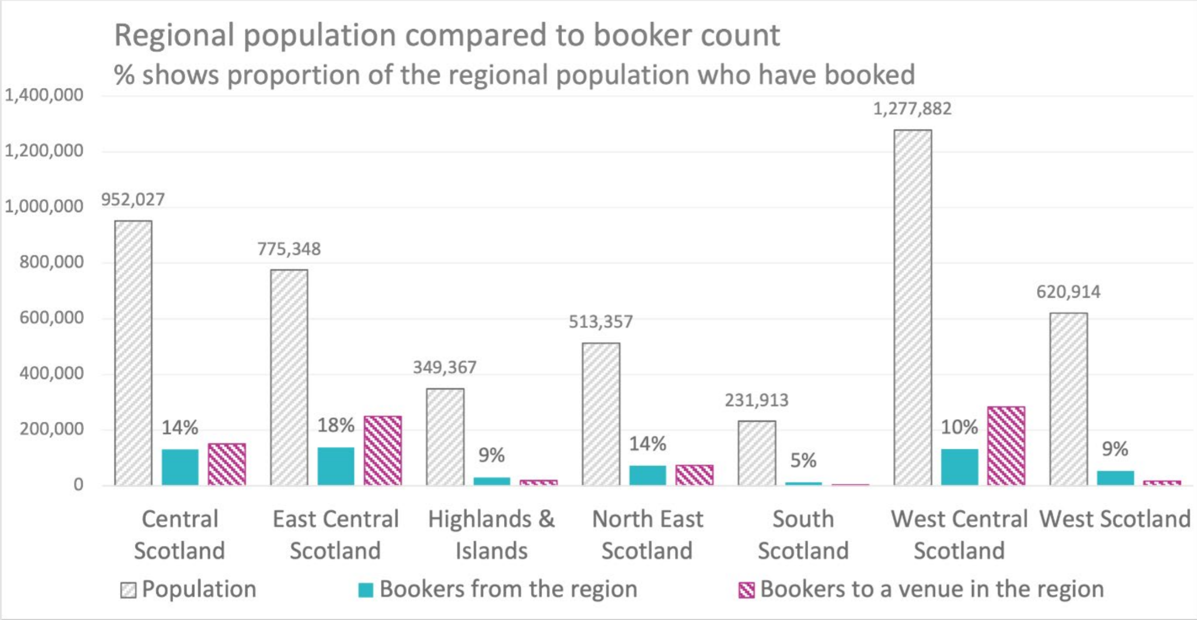
Comparing the three regions of central Scotland, which account for the considerable majority of bookings, Central Scotland and West Central Scotland had better representation of the lower engaged groups than East Central Scotland. As an example, Facebook Families made up 7% of bookers in Central Scotland, compared to 8% of households, and 5% of bookers in West Central Scotland, compared to 6% of households. By contrast, in East Central Scotland just 2% of bookers were Facebook Families although they also made up 6% of households. The representation of Heydays among bookers in East Central Scotland was also the lowest across all regions, at just 1% compared to 6% of households. East Central Scotland had a similar percentage of lower engaged households as the Highlands and Islands, although half as many were bookers.
For regional profiles of bookers compared to the population, please see Appendix 1.

Although the higher engaged Experience Seekers group were over-represented overall in Scotland, at 17% of bookers compared to 12% of households, they tended to be slightly under-represented in the regions outside of central Scotland. They were most heavily over-represented in West Central Scotland at 25% of bookers compared to 15% of households.

Regions

Coverage of bookers across regions



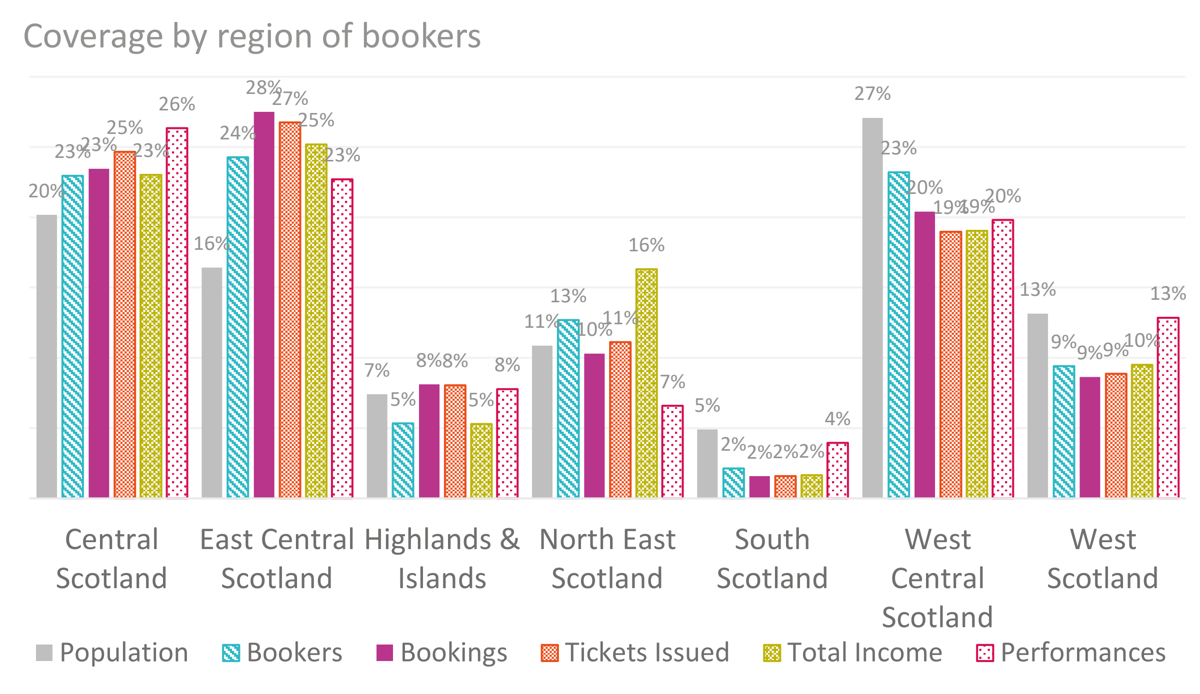


Note: Bookers from the region are not necessarily booking within the region, they could be booking to a venue outside the region. Conversely, bookers to a venue in the region could live anywhere in Scotland.

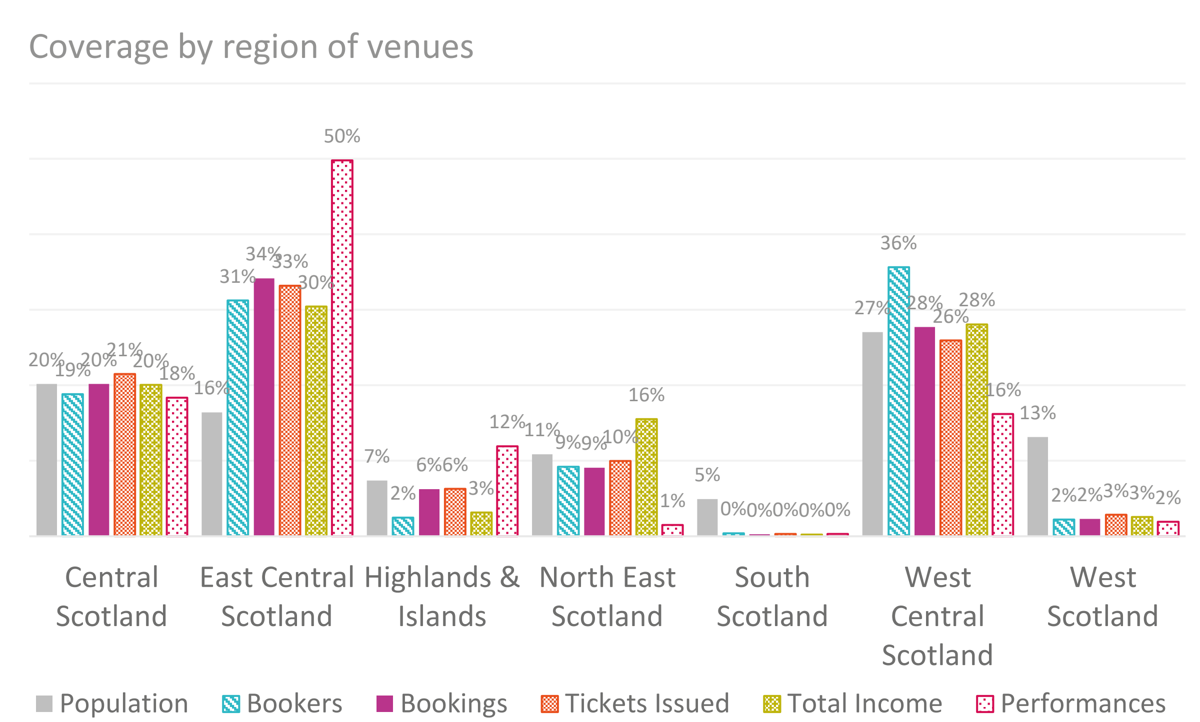
Differences in the percentage of bookers from a region and bookers to a venue in a region indicate which regions have more venues that attract outside visitors. These regions were West Central Scotland and East Central Scotland, which contain the major cities of Glasgow and Edinburgh.

East Central Scotland had the highest percentage of bookers (18%) followed by North East Scotland and Central Scotland (both 14%). South Scotland had a lower proportion of the population who'd booked (5%) perhaps due to fewer venues and spill-over to venues across the border not included in this analysis. West Scotland was also below average (9%), at a similar level to the Highlands and Islands.

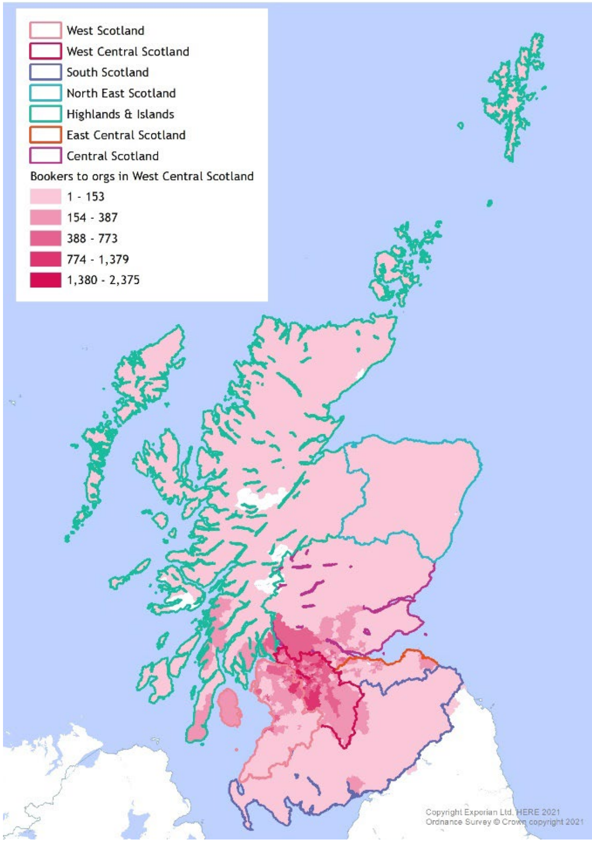
There was only one venue in both South Scotland and West Scotland in this analysis, explaining the very low number of bookers to venues in those regions. Looking at the data outside of the benchmark consortium of organisations, we found that South Scotland audiences book mainly in Scotland, but also in England: Berwick Maltings is the second most visited venue across the period, and 3 out of their top 10 most visited organisations are in the North West and North East of England.

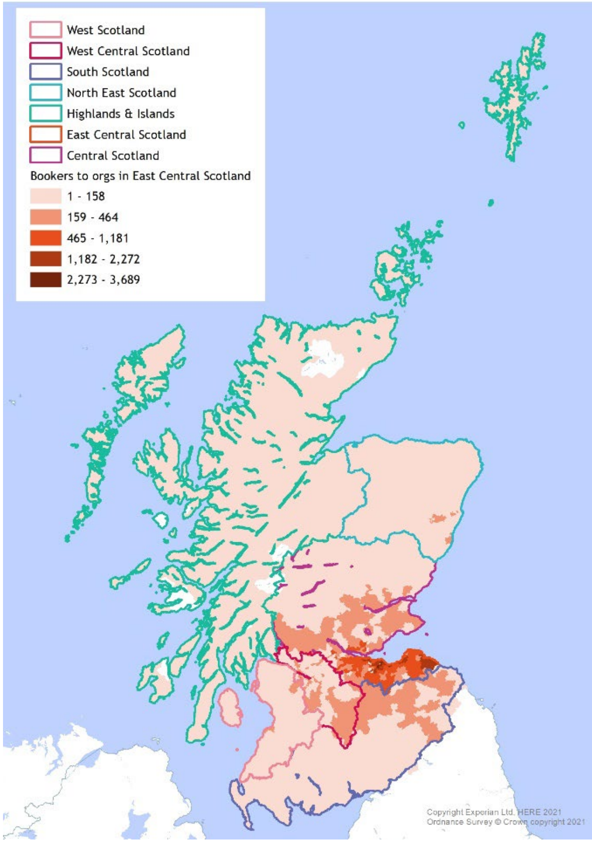


Again, East Central Scotland had by far the highest percentage of bookers (24%) relative to its percentage of the overall population (16%). The majority of the regions had a lower percentage of bookers than of the population, including West Central Scotland (23% cf. 27%) and the Highlands & Islands (5% cf. 7%).

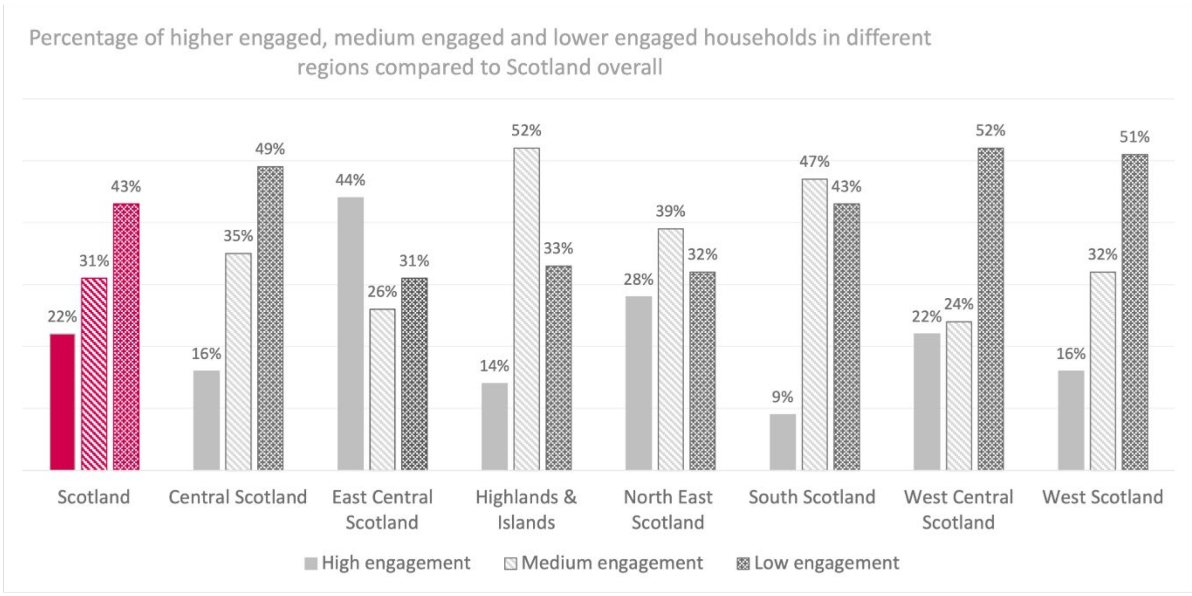


Despite its relatively small share of the population (16%), East Central Scotland had 50% of all the performances and events due to the Edinburgh Festival. The Highlands & Islands also had a higher proportion of performances and events relative to their share of the population. North East Scotland had very few performances and events (1%) relative to its percentage of the population (11%).

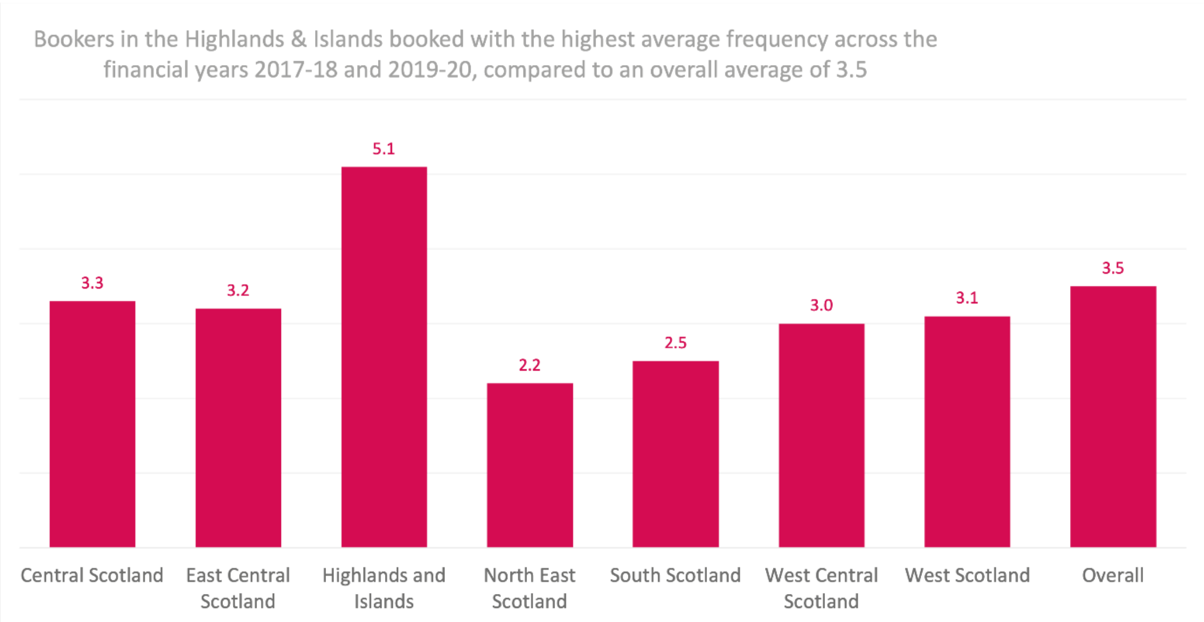




Organisations in West Central Scotland attracted a comparatively smaller concentration of bookers from the east than East Central Scotland did from the west. East Central Scotland also attracted slightly more bookers from North East Scotland.

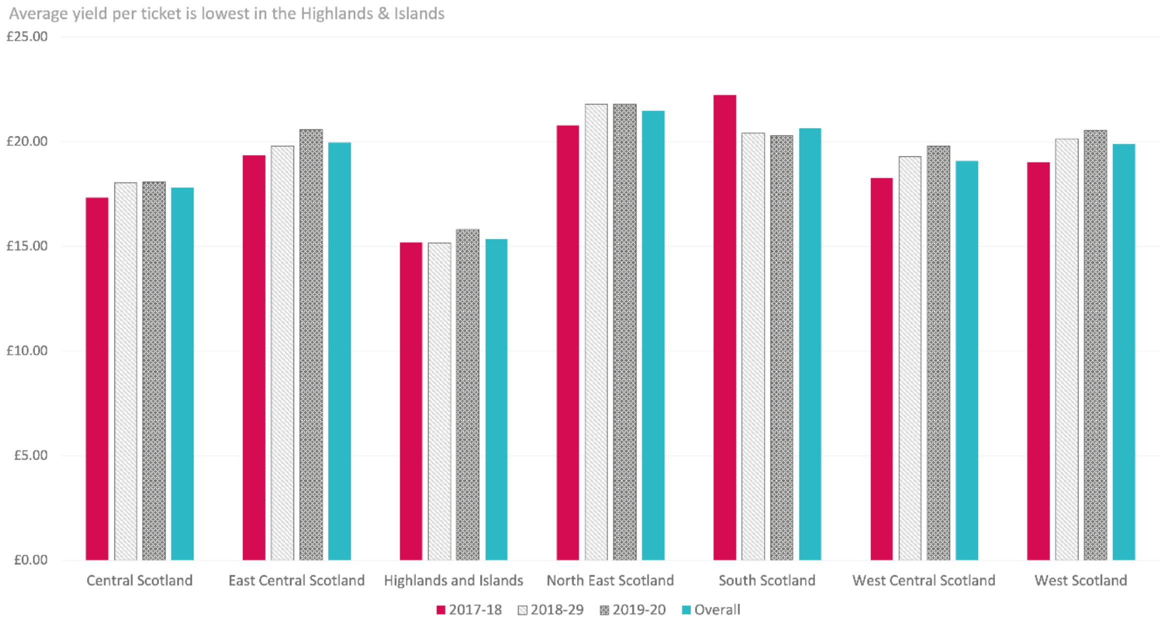


The Highlands and Islands has a notably broader social mix than the other regions. Higher engaged audiences only account for 14% of all households in the Highlands & Islands, one of the lowest in any region, while 52% are medium engaged and 33% are lower engaged. As stated earlier in the report, the Highland & Islands had a higher percentage of bookers among its lower engaged audiences. For example, the Up Our Street group accounted for 12% of households and 9% of bookers compared to 15% of households in West Central Scotland but 10% of bookers and 10% of households in East Central Scotland but just 5% of bookers (please see Audience Spectrum by region charts in the appendix).

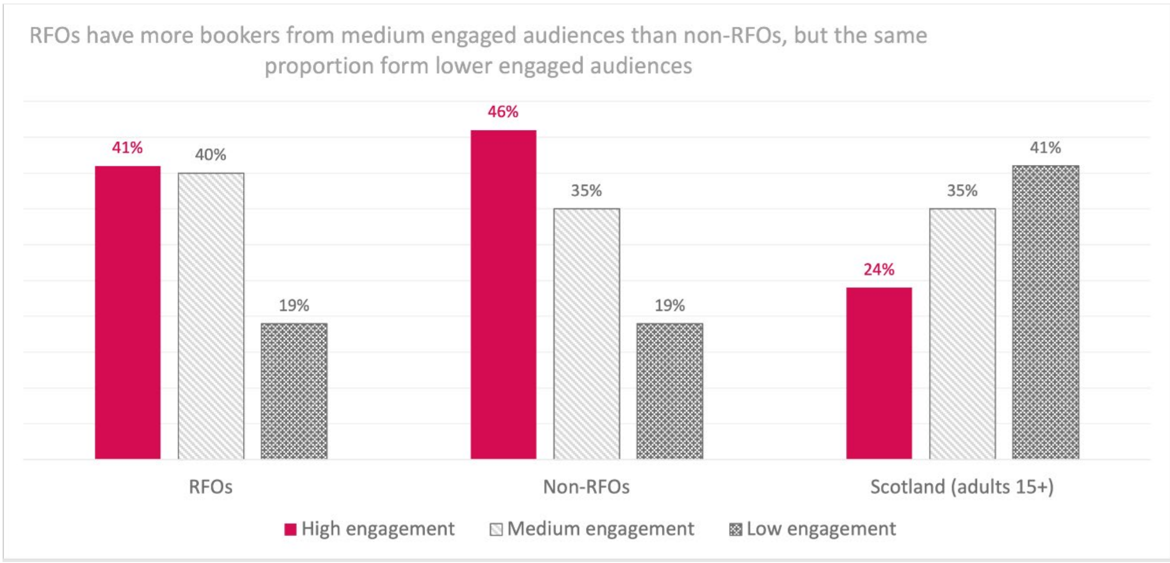


The cultural venues in the Highlands and Islands play a role as community hubs with a particularly high regional engagement, and this is reflected by clear differences in the regions booking behaviour compared to the rest of the country. For example, buyers in the

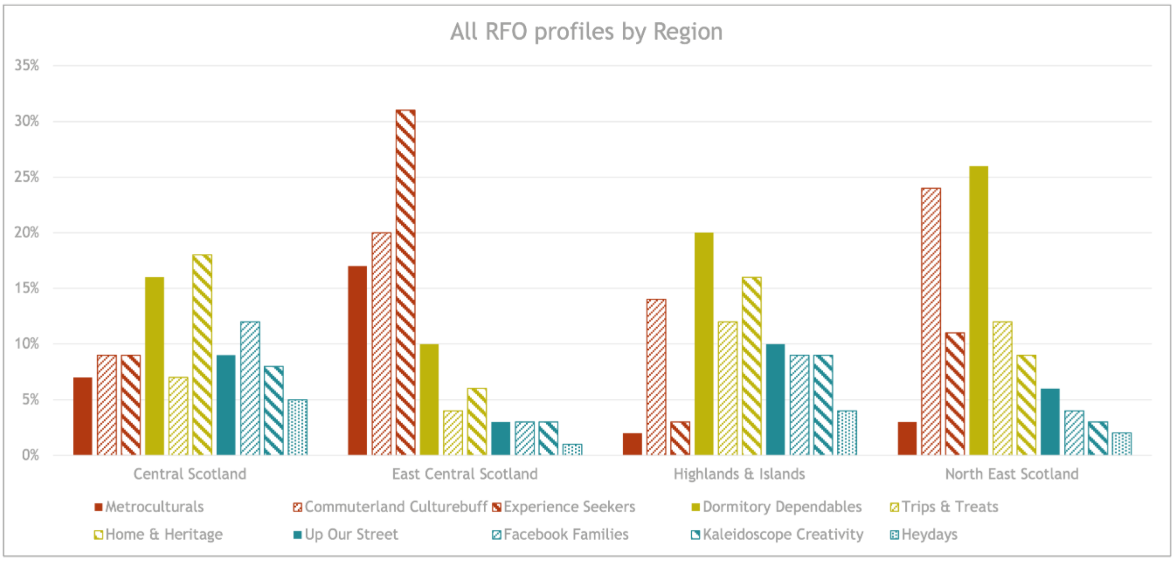
Highlands and Islands also booked with far great frequency than in other regions, at an average of 5.1 times compared to the overall average of 3.5. This 5.1 figure, however, disguises some discrepancy between areas in the region, with the Shetland Islands having a very high frequency of 10.7 compared to the Highlands (2.5) and the Orkney Islands (2.4) at the lower end of the scale.

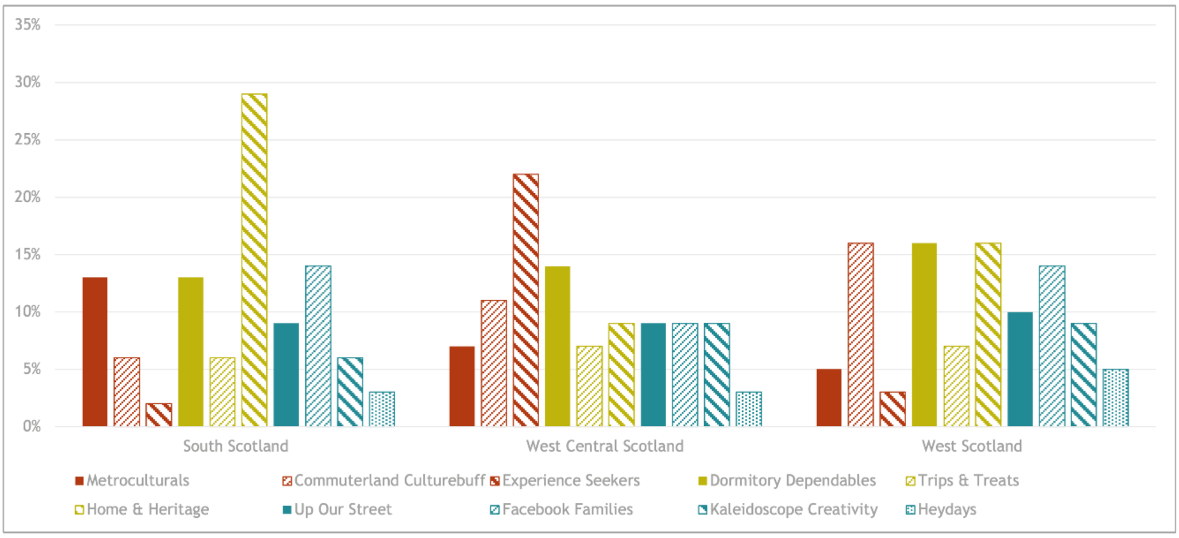


At £15.35, the average yield per ticket in the Highlands and Islands was the lowest of all the regions. This may explain a low percentage of the total income (3%) relative to the percentage of total bookings taken by venues in that region (6%). By contrast, North East Scotland had a relatively high percentage of total income (16%) compared to the percentage of bookers and bookings (both 9%) for venues in the region. This is likely explained by its average ticket price, which at £21.47 was the highest across the regions.

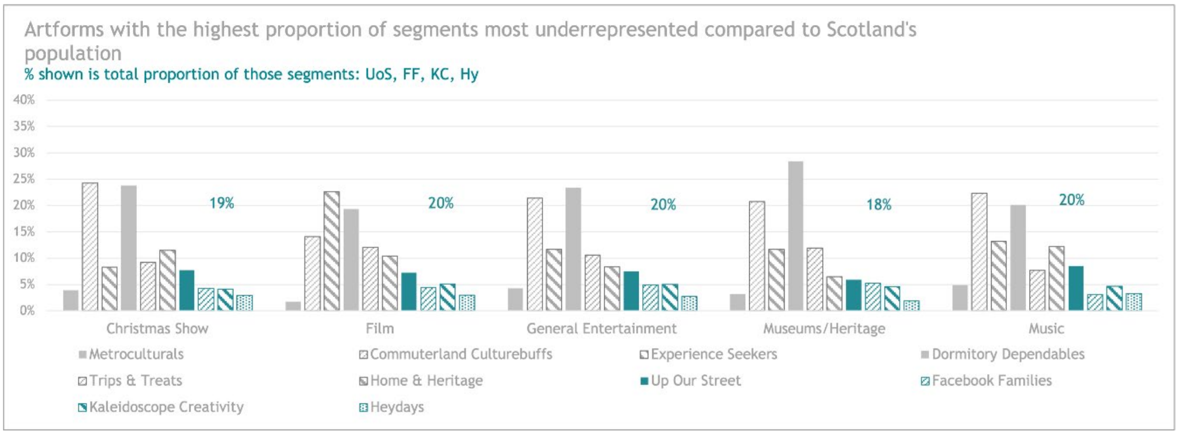


RFOs had more bookers from typically medium engaged audiences (40%) than non-RFOs (35%). This was particularly true for the Home & Heritage group, which makes up 10% of audiences for RFOs but 7% for non-RFOs. Among higher engaged audiences, non-RFOs had a higher proportion of Metroculturals and Experience Seekers than RFOs, but the generally older Commuterland Culturebuffs marginally favoured RFOs (20% of bookers for RFOs cf. 19% for non-RFOs).



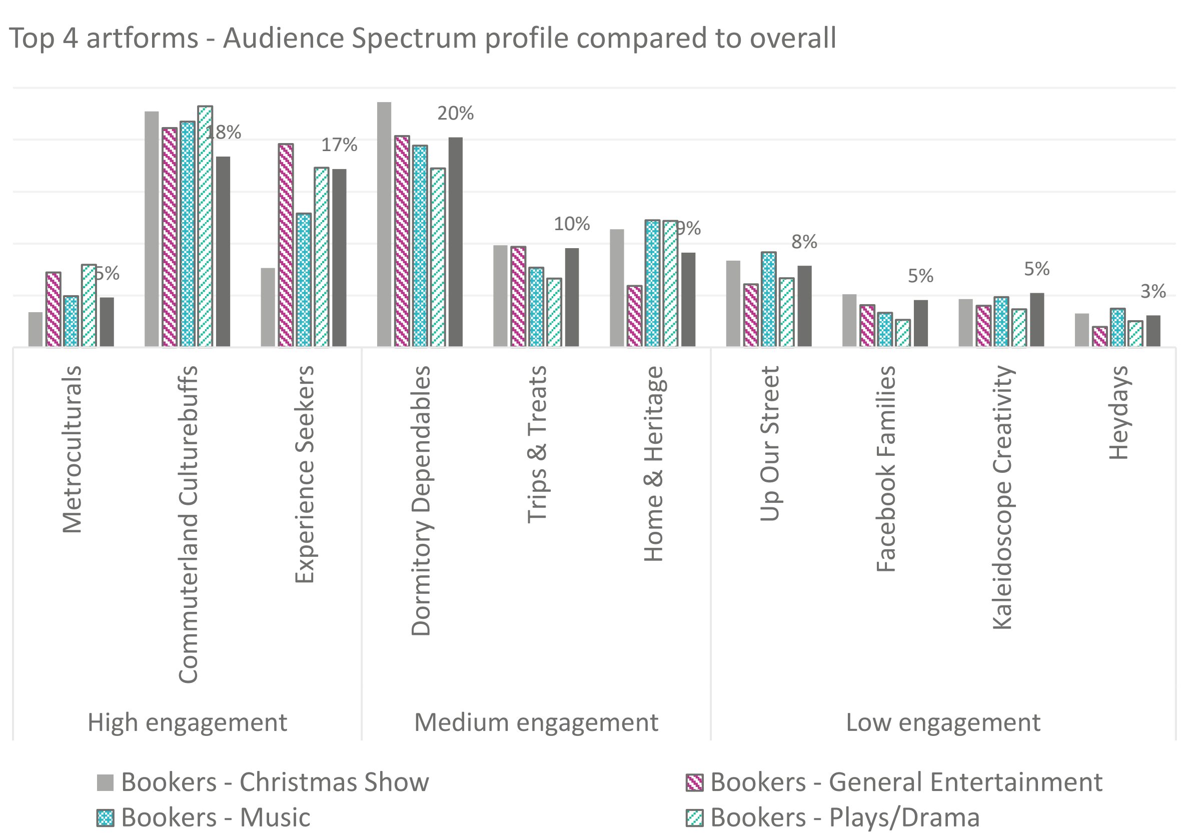


The regions where Regularly Funded Organisations (RFOs) were particularly effective at reaching typically lower-engaged audience groups were Central Scotland, where they made up 34% of bookers, and West Scotland (37%). However, this was mainly for Film, Children & Family and Workshop events (and not, unusually, for Outdoor Arts). These two regions also have some of the highest proportion of those lower-engaged audience groups in their population. The regions where RFOs were least effective at reaching typically lower-engaged audiences were East Central Scotland (10%) and North East Scotland (15%). In East Central Scotland 68% of bookers were from typically higher engaged groups.

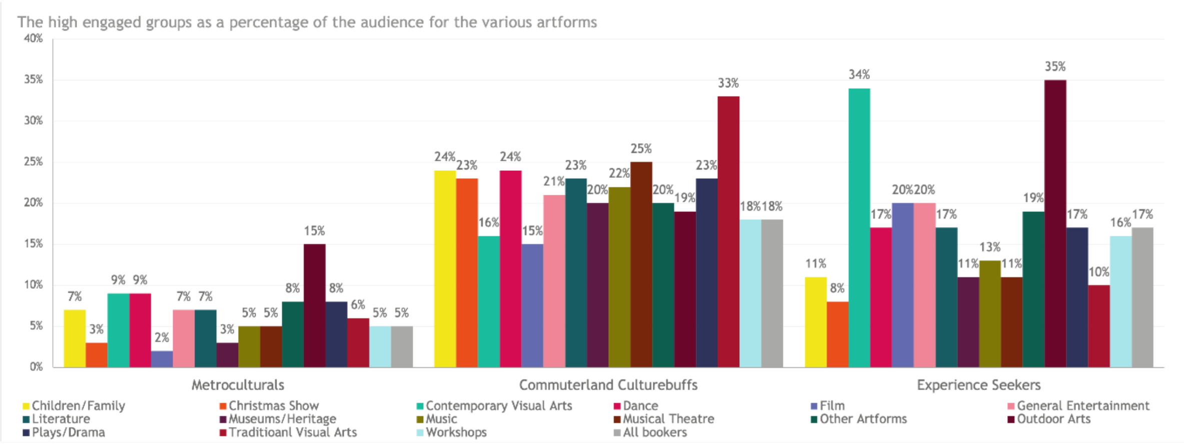


Sectors and Art Forms

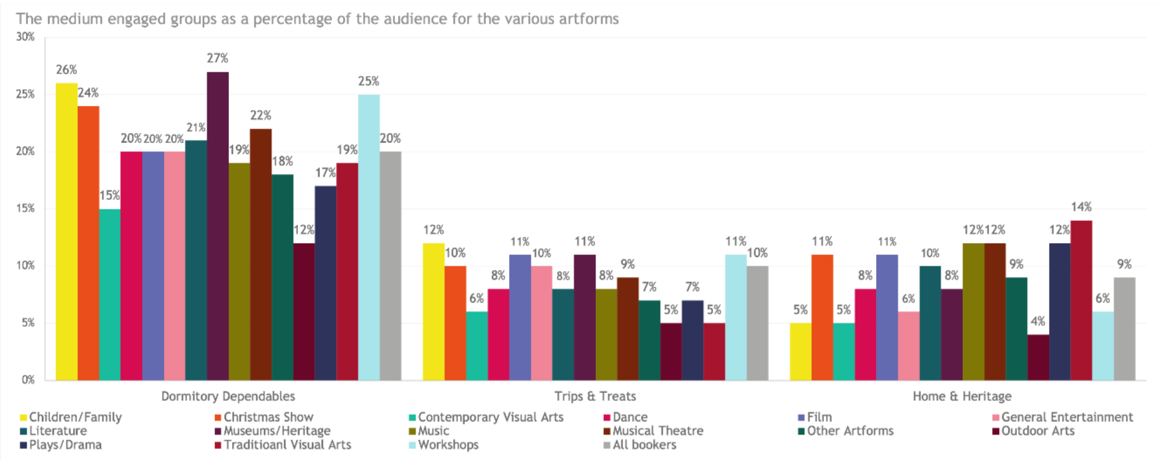
Profile by Art Forms



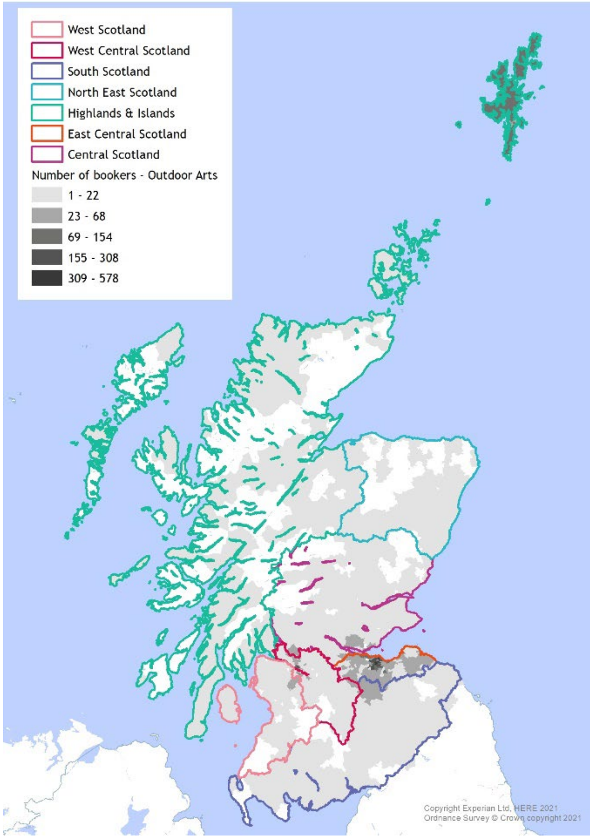
The four most popular artforms were Music, General Entertainment, Plays/Drama and Christmas Shows. Among these, Music and Christmas Show had the highest proportion of typically lower engaged audiences at 21%, with the lowest proportion among audiences for Plays/Drama (15%).

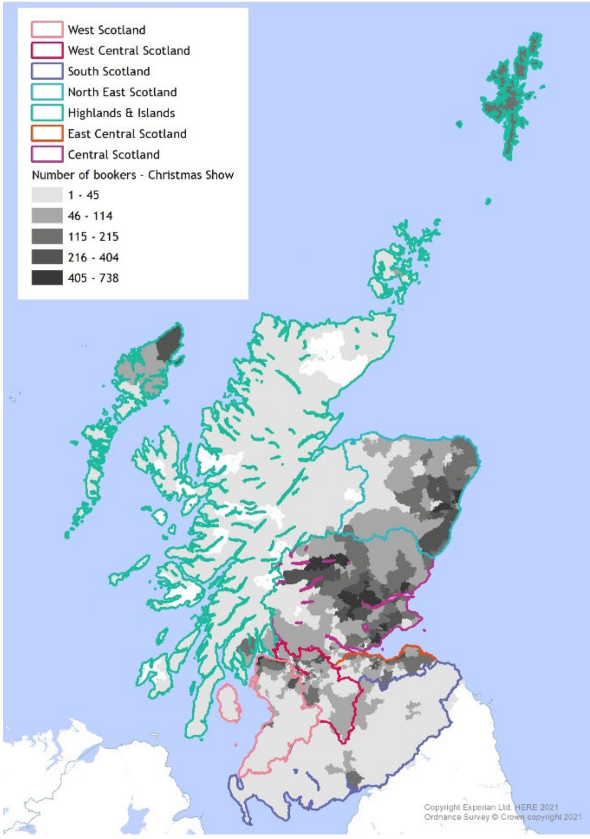


In general, the difference in attendance for the various artforms among Audience Spectrum groups reflected what we might expect from their profiles. Among traditionally more highly engaged audiences, the Commuterland Culturebuffs, who tend to be older, showed a clear preference for the Traditional Visual Arts. They made up 33% of its audience compared to just 16% for Contemporary Visual Arts. Similarly, and showing a very clear divide in interests, the younger Metroculturals and Experience seekers accounted jointly for 43% of audiences for Contemporary Visuals Arts and just 16% of audiences for Traditional Visual Arts. Together, Metroculturals and Experience Seekers also made up 50% of the audience for Outdoor Arts. It is worth noting that Contemporary Visual Arts and Traditional Visual Arts had the two smallest sample sizes compared to other artforms, so these results might be skewed by one or a few events.

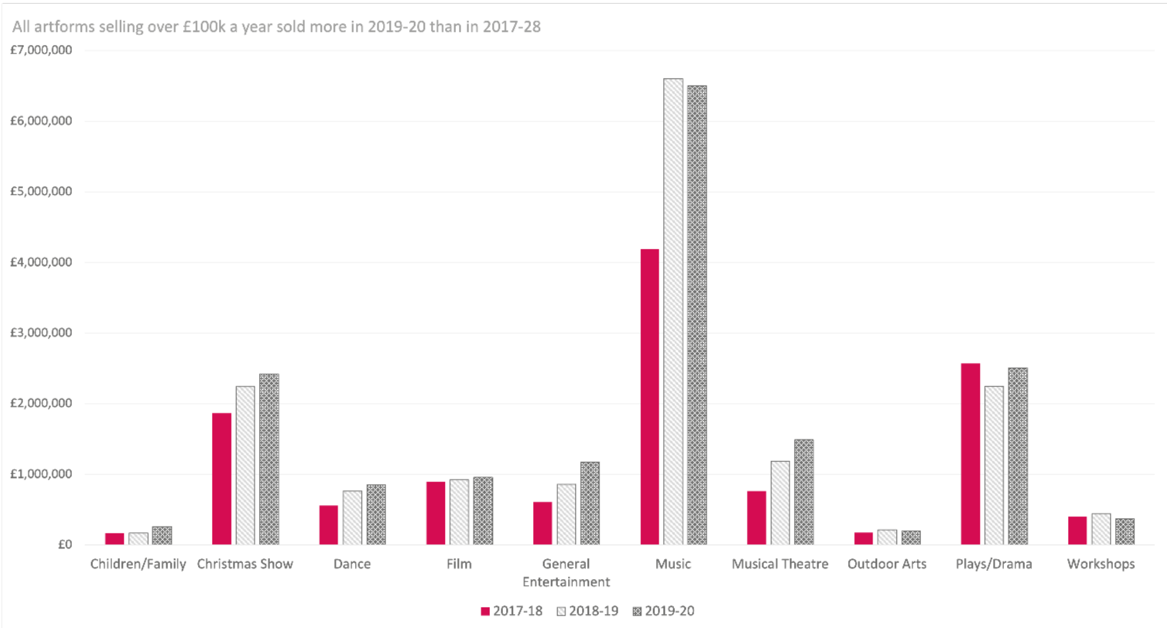


Among medium engaged audiences, the Dormitory Dependables and Trips & Treats showed similar preferences Museums and Heritage, Children/Family and Workshops, while Trips & Treats also favoured Film. The Home & Heritage group differed slightly, showing particular interest in the Traditional Visual Arts, Music, Musical Theatre and Plays/Drama.





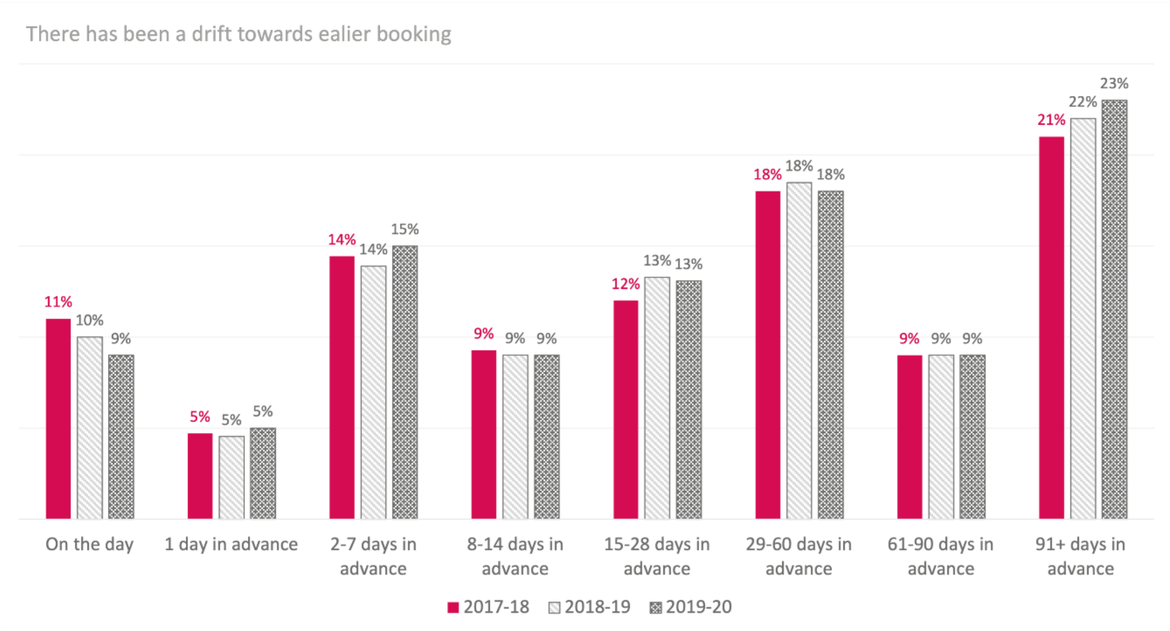
Bookers for Outdoor Arts were highly concentrated in East Central Scotland, whereas the more broadly popular Christmas Shows had high concentrations of bookers throughout the country.



Note: The results for music have been skewed by a lack of correctly coded data from the Glasgow Royal City Hall in the year 2017-18, explaining the sharp increase in sales in 2018-19.

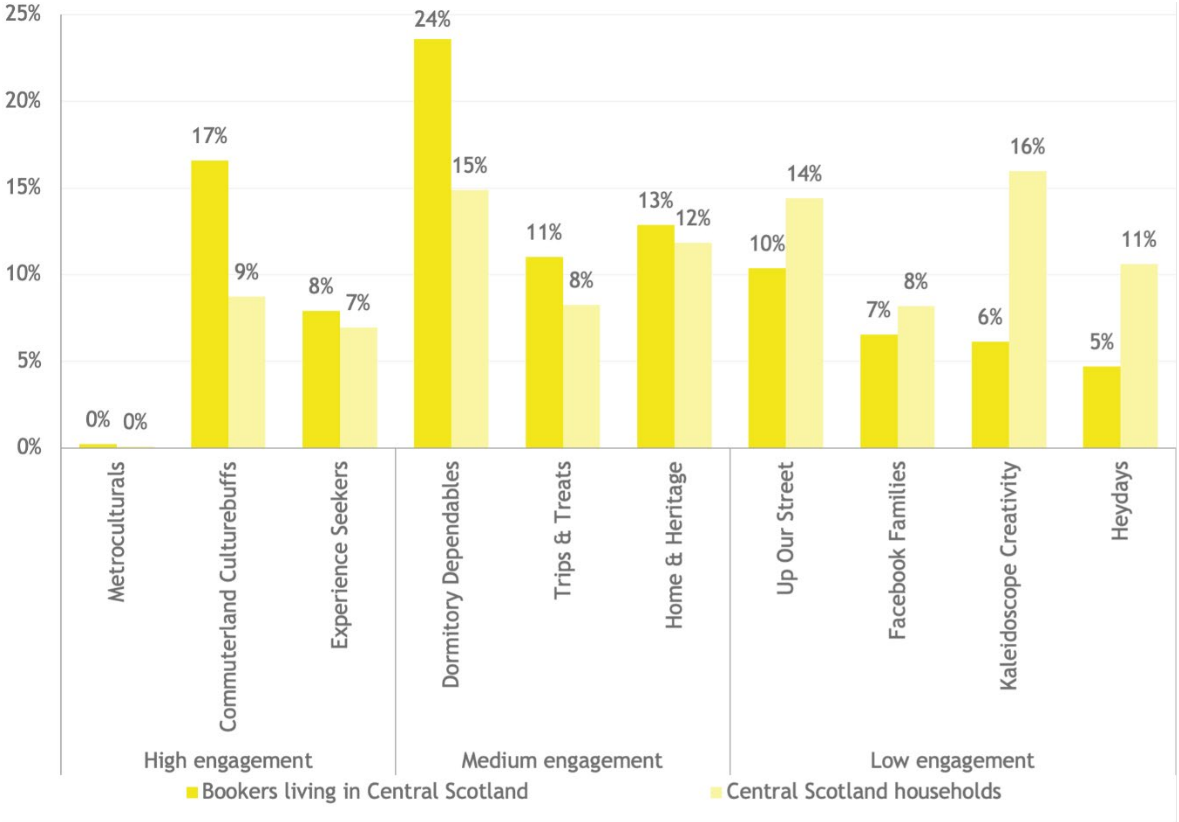
Among the artforms selling over £100k in tickets per year, for which the high volume avoids misleading fluctuations due to specific events, Music, Plays/Drama and Christmas Shows had the highest revenue. All of the artforms sold more in the year 2019-20 than they had in the year 2017-18, with the exception of Plays/Drama and Workshops. Workshops often fluctuate substantially due to the combination of high-volume, low price and low volume, high price events in the same category. Plays/Drama saw a dip in bookers and bookings in 2018-19, this decline in audiences matches a similar decline across the UK.

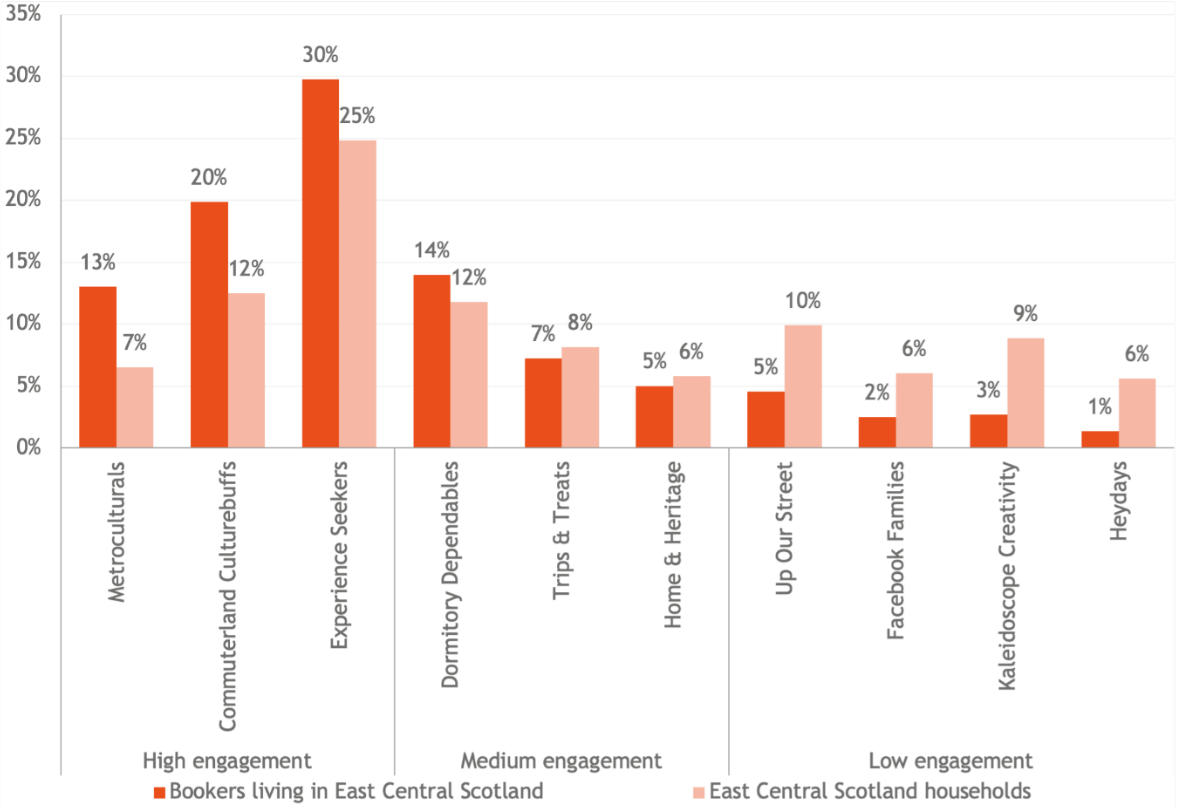
The artforms that saw the smallest increase between 2017-18 and 2019-20 were Film (7%) and Outdoor Arts (11%). All the other artforms increased by 30% or more, far exceeding expected inflationary increases. General Entertainment showed an increase of 90%, perhaps because the number of bookings greatly increased and in the same period its average yield per ticket sold rose from £17.57 to £23.59.



There has been a drift towards earlier booking. This might be due to the decreased proportion of bookings of Film in the mix of events.

Appendix 1: Regional Audience Spectrum Profiles





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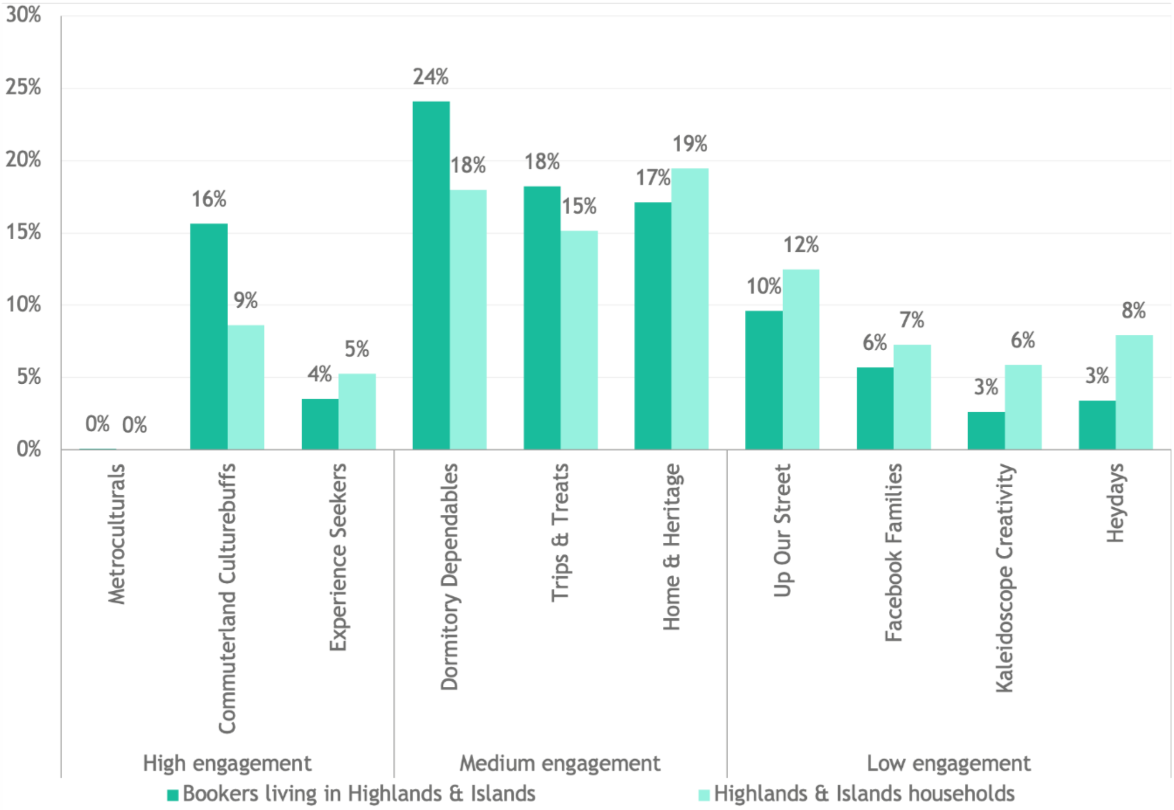
Bookers living in East Central Scotland
East Central Scotland households



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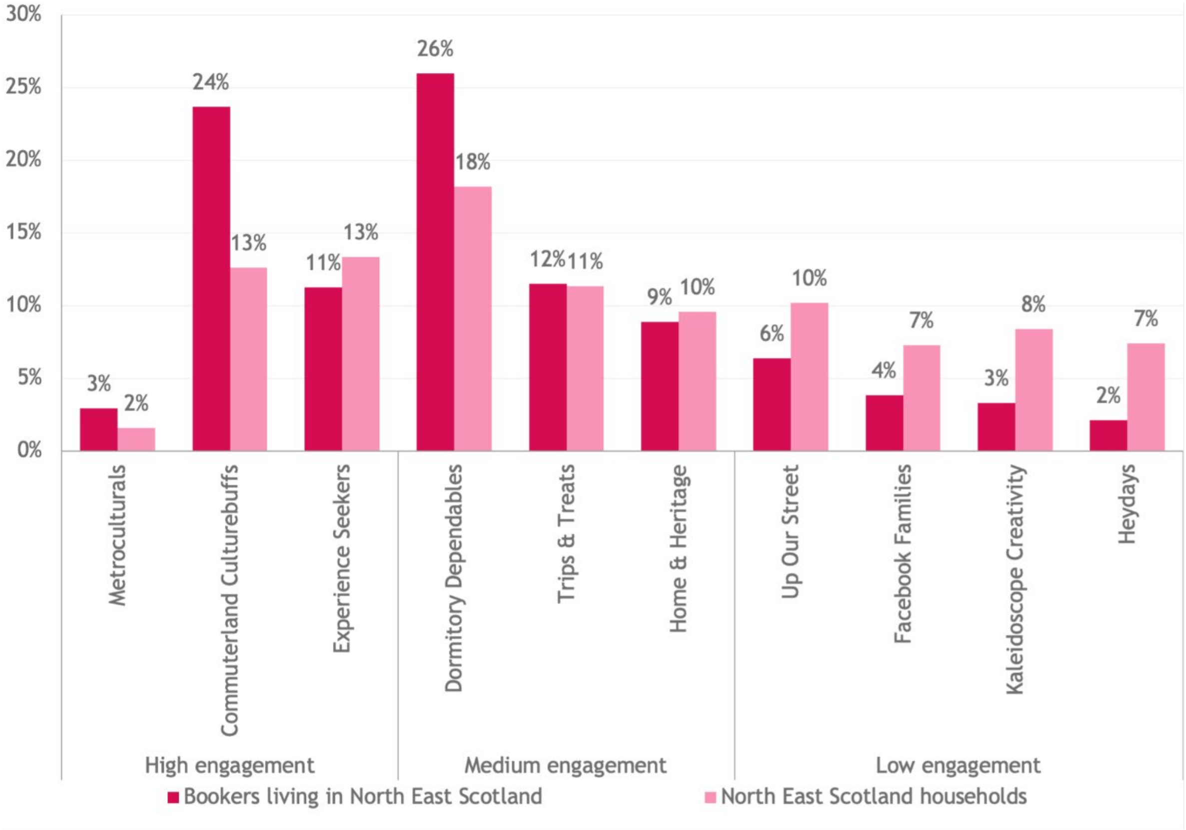
Bookers living in Highlands & Islands
Highlands & Islands households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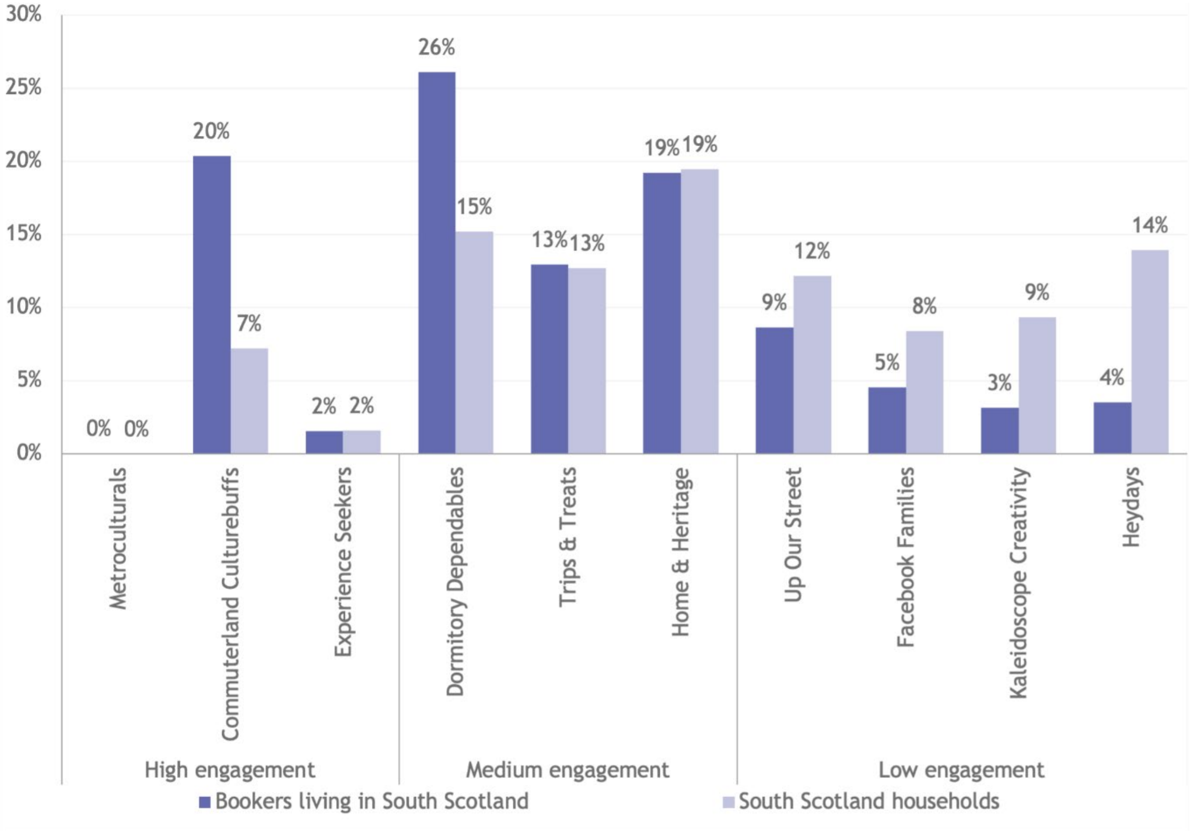
Bookers living in North East Scotland
North East Scotland households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Bookers living in South Scotland
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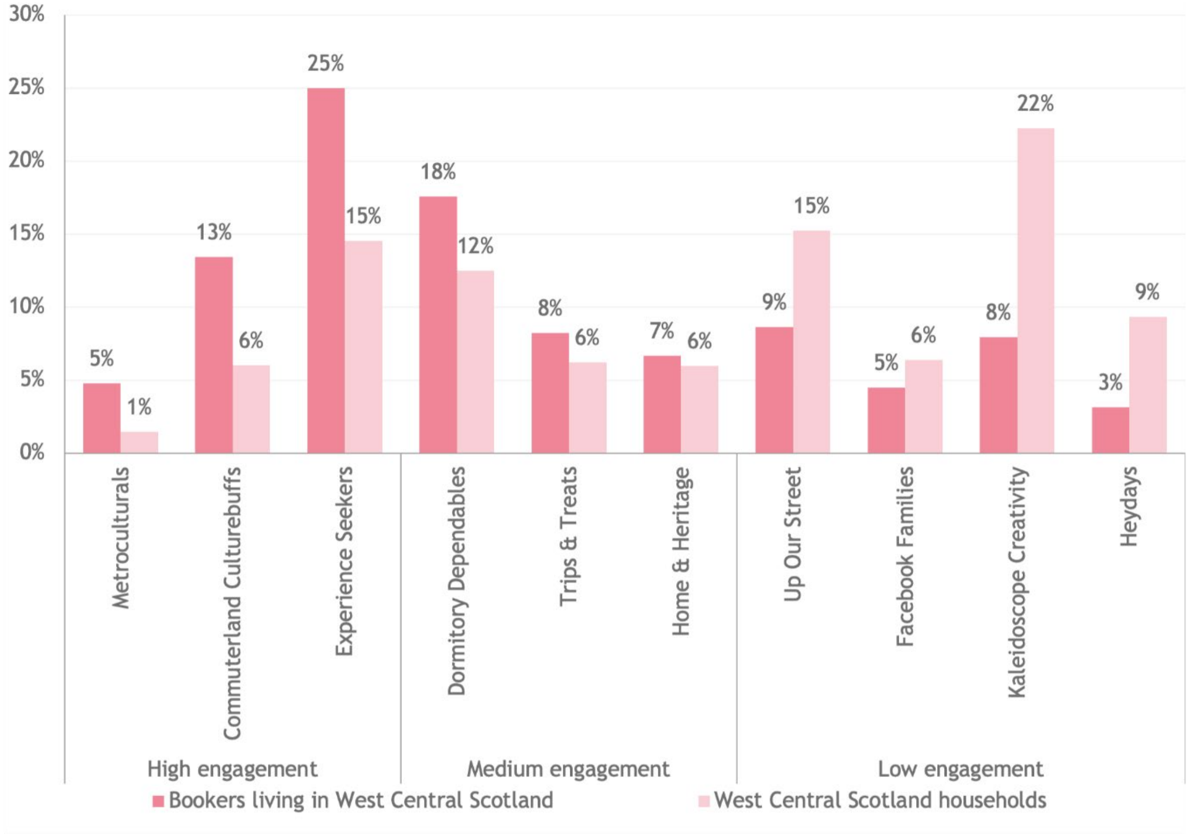
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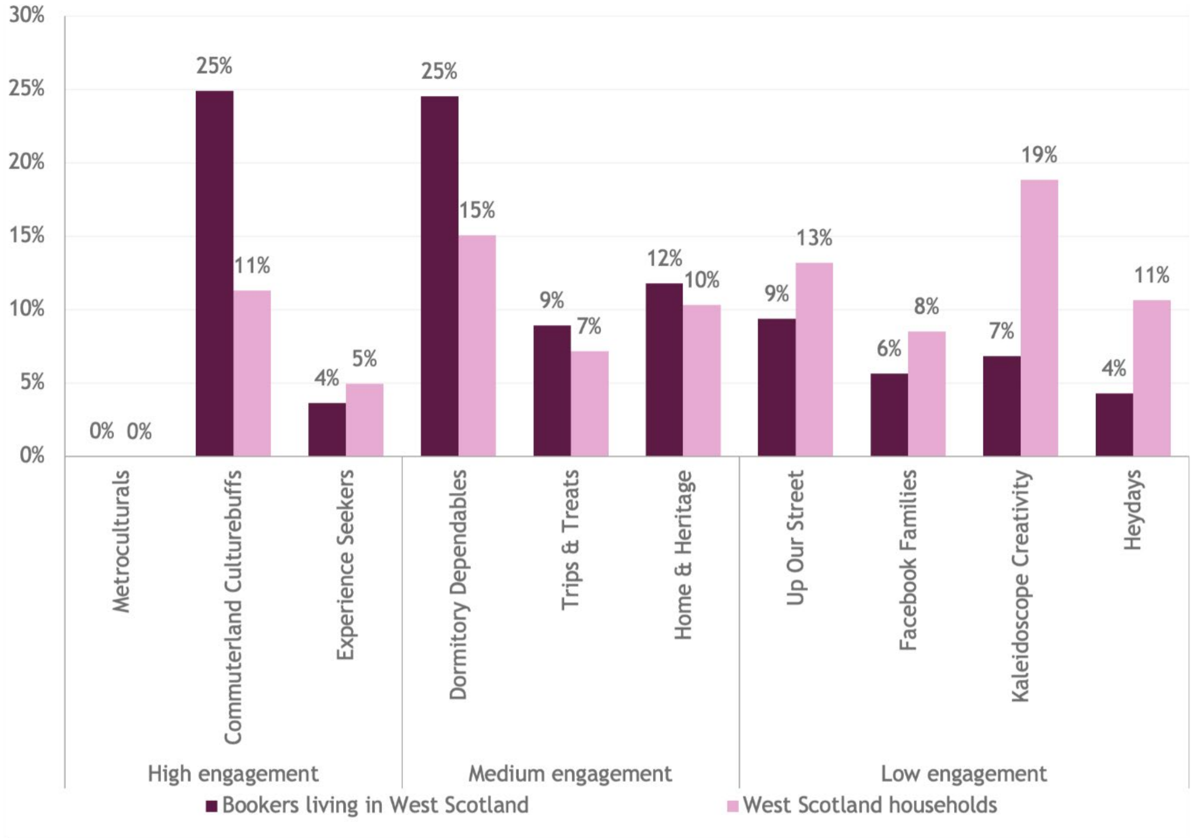
West Central Scotland households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Trips & Treats
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Medium engagement
Low engagement
Bookers living in West Scotland
West Scotland households

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