

North East Scotland and Highlands & Islands Place Based Insights

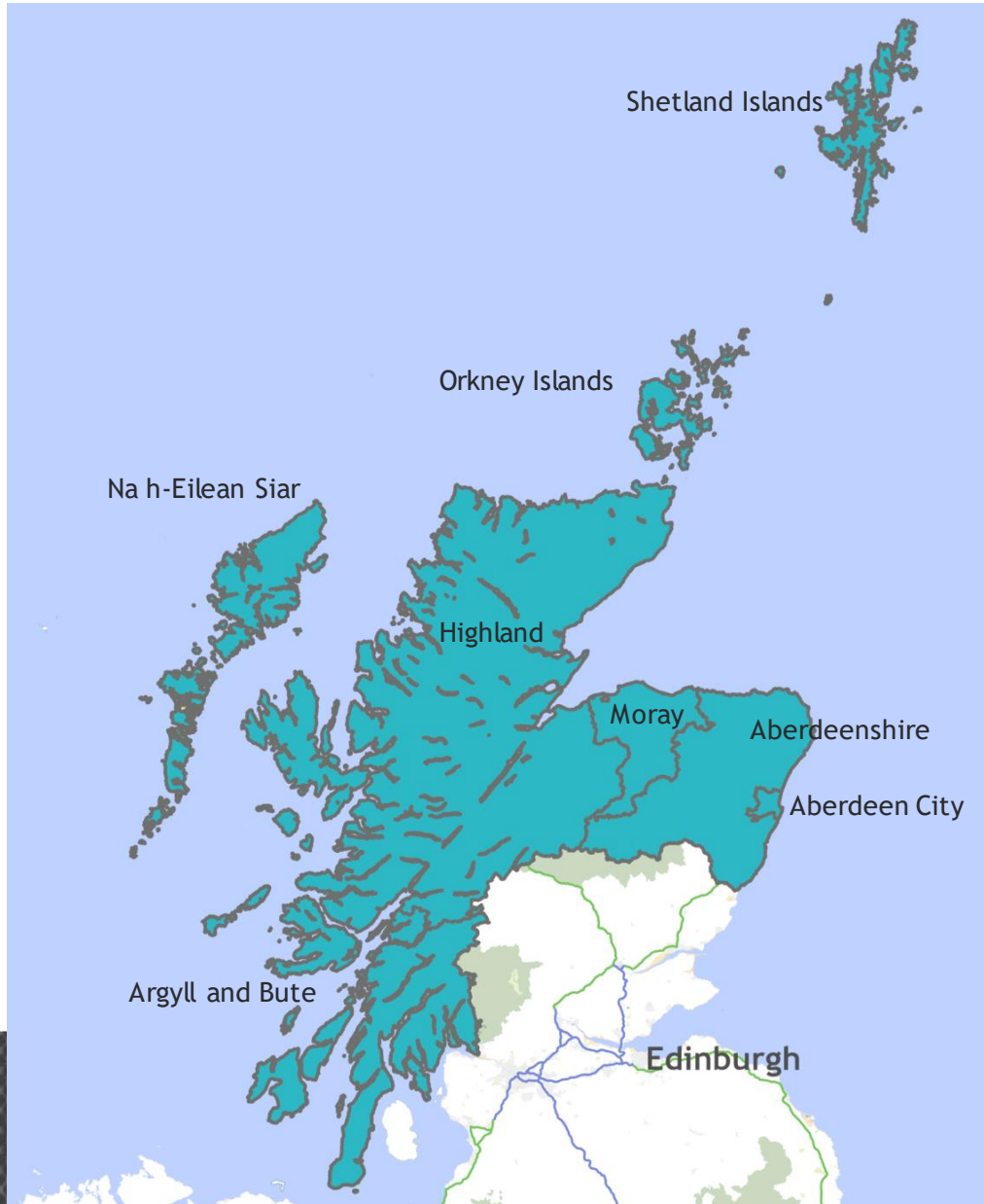
Oliver Mantell, Director of Evidence & Insight

Ella Brown, Evidence Researcher

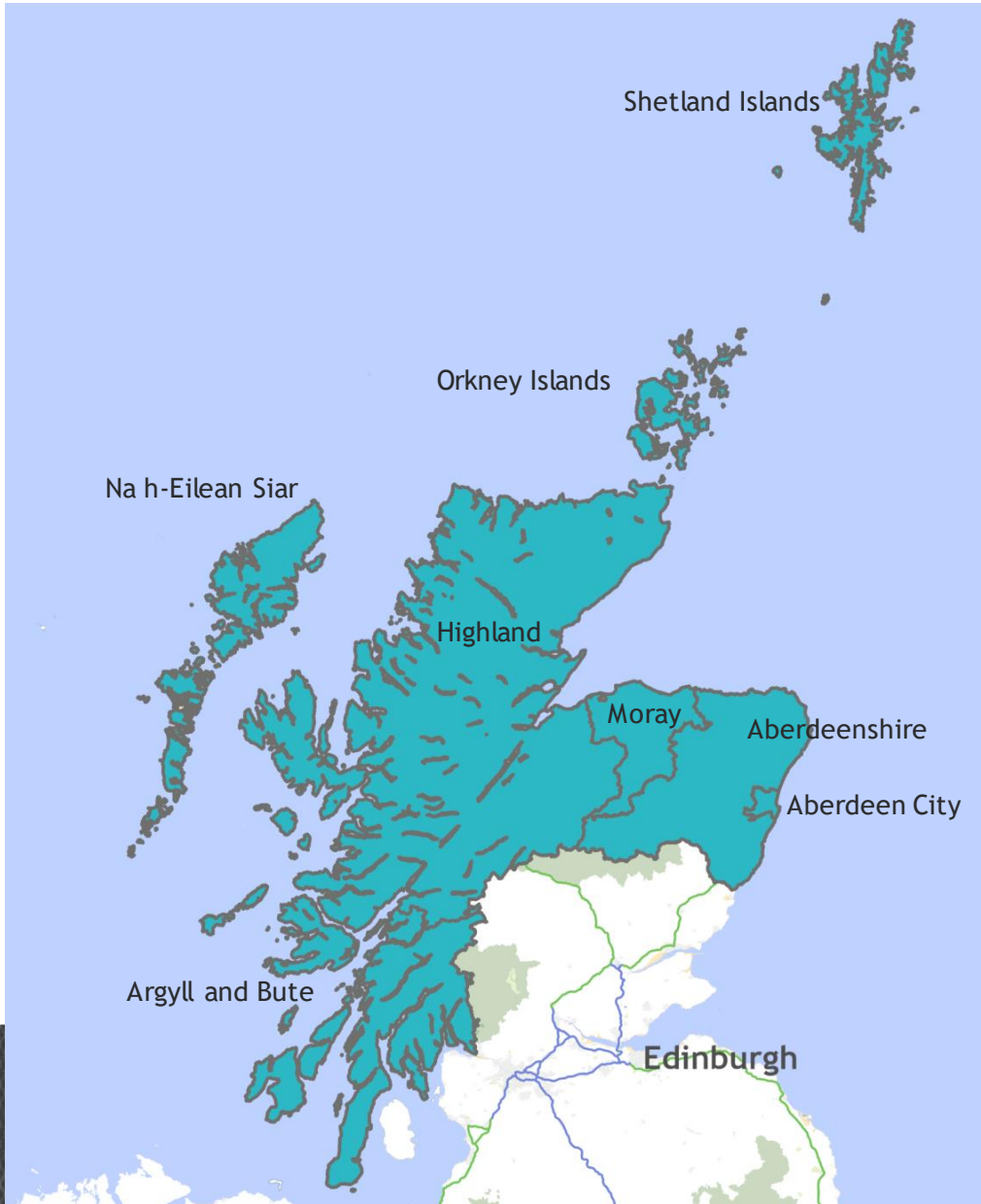
Isaac Kay-Lavelle, Evidence & Insight Research Assistant

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

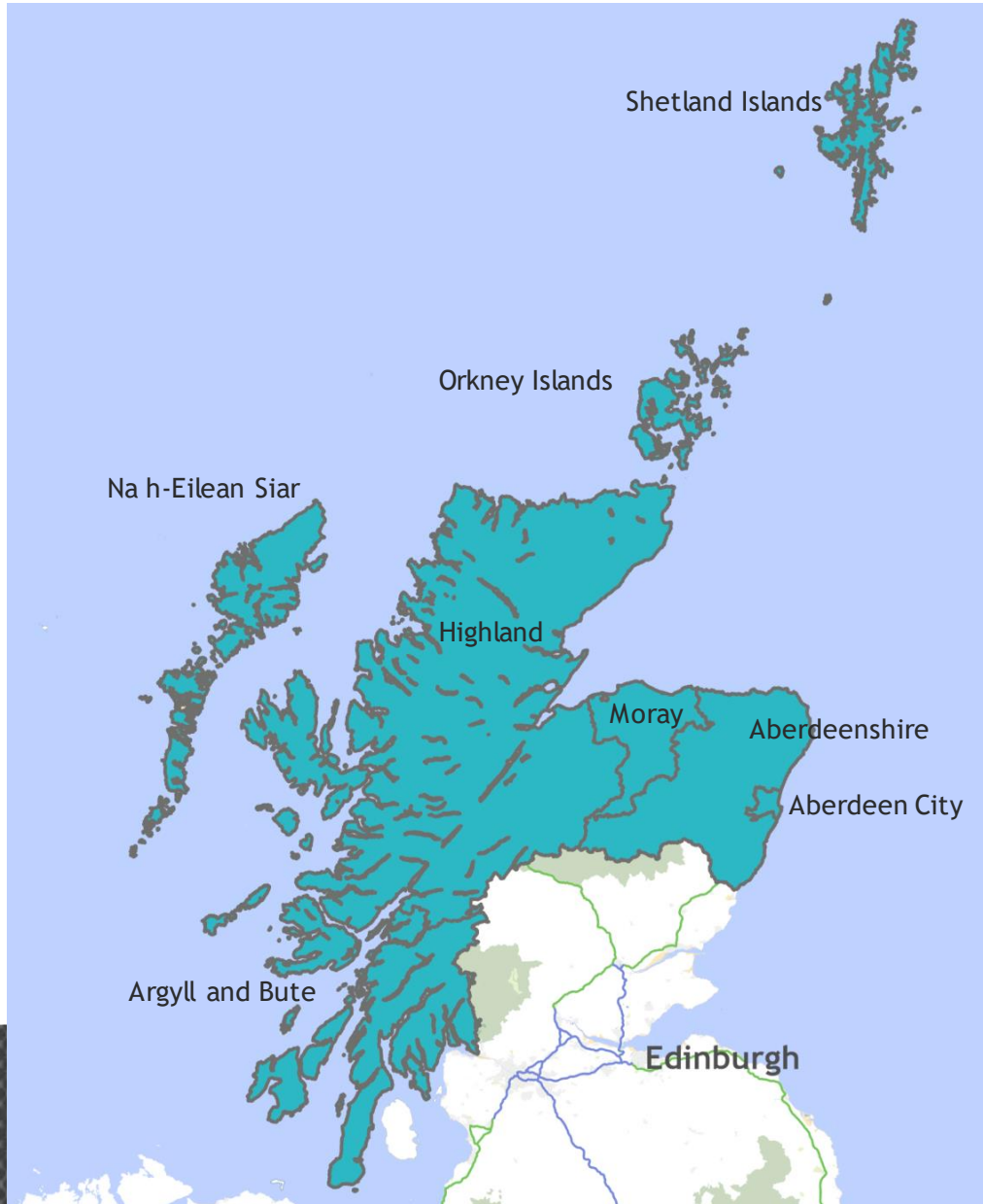
- Audience Spectrum / Audience Finder (ticketing & survey) / Census / TGI

Postal sector

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

Caveat about the data...

- Sparse local population and infrastructure
- Different sizes of postcode sectors (etc)
- Census 2021 not available yet
- Experian 'pixels'
- Audience Spectrum uncoded / small samples
- Venues (e.g. Eden Court / Pitlochry Festival Theatre)



 audience
spectrum

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



Key Data Sources

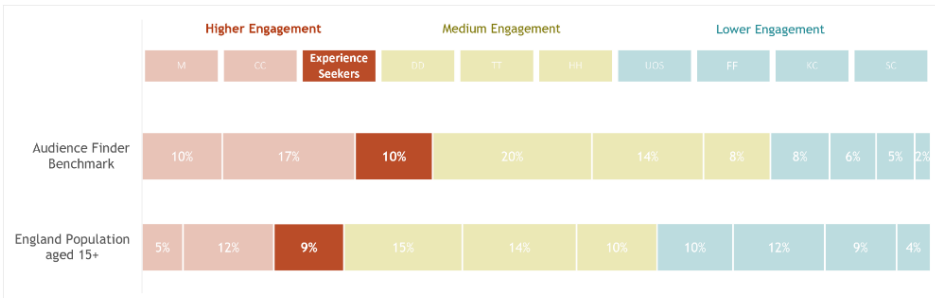
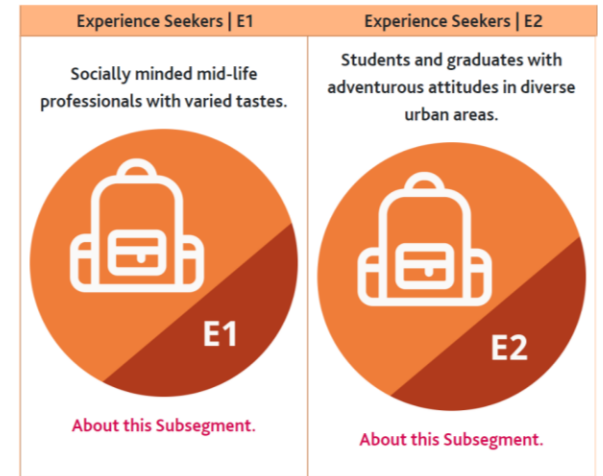


- Taking Part - National depth survey
- Cultural Proximity - Convenience of offer
- Experian Data Universe - wider consumer data
- Population/Census - core demographics
- Behavioural data: survey and ticketing



Experience Seekers

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



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.



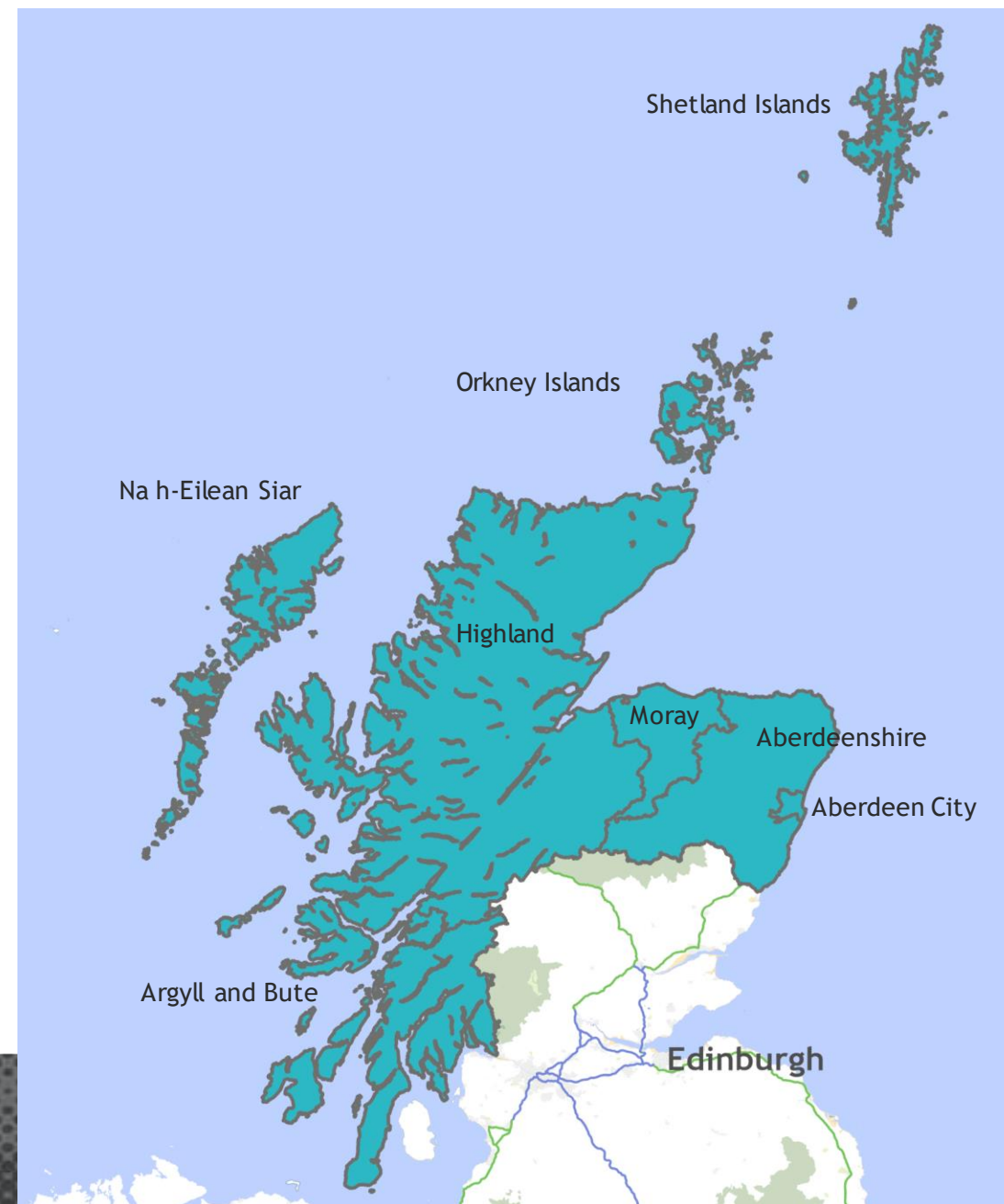
Supported Communities | S2
Elderly residents of sheltered housing, with low incomes and declining health.



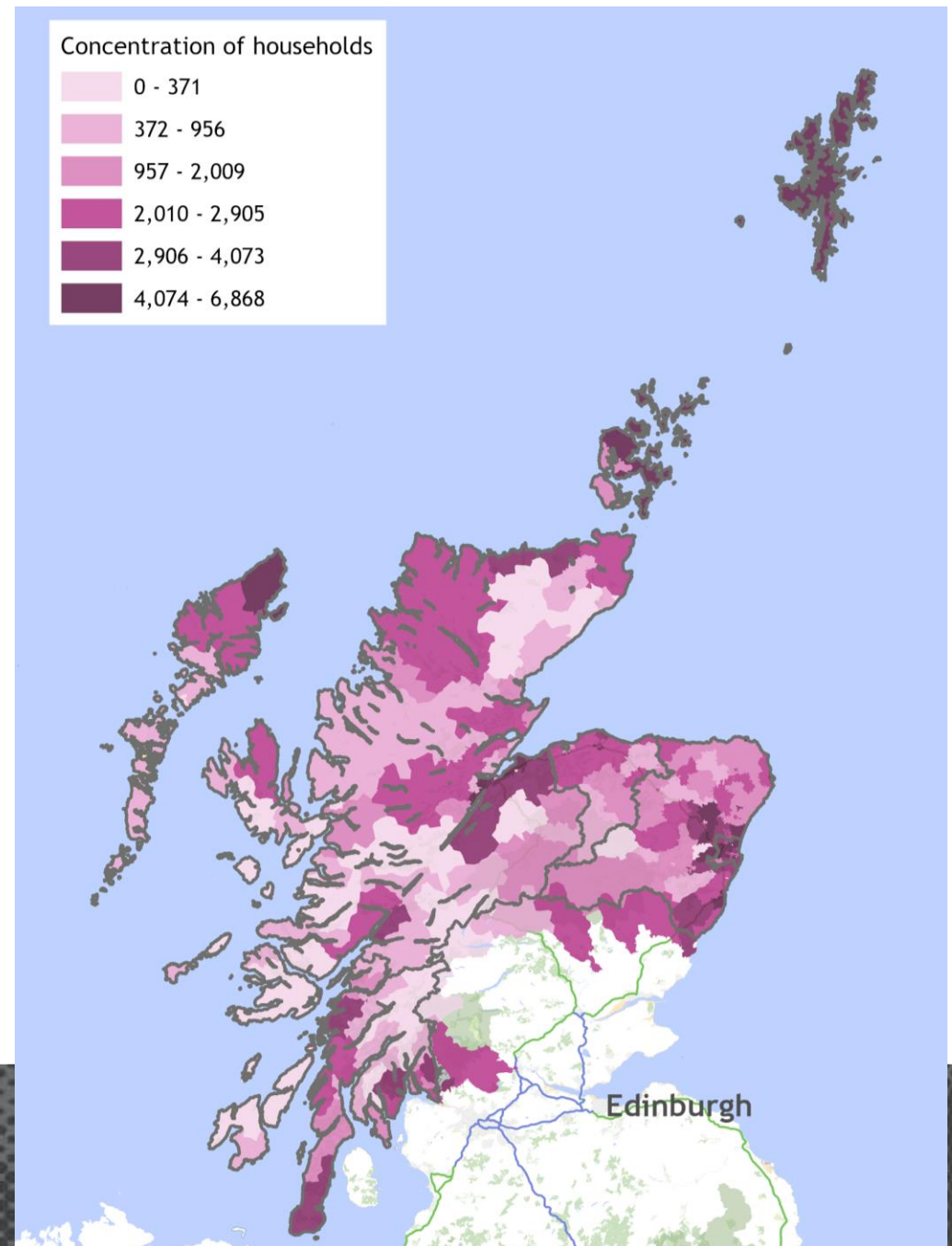
Who is the Local Population?

Local Area and Population

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

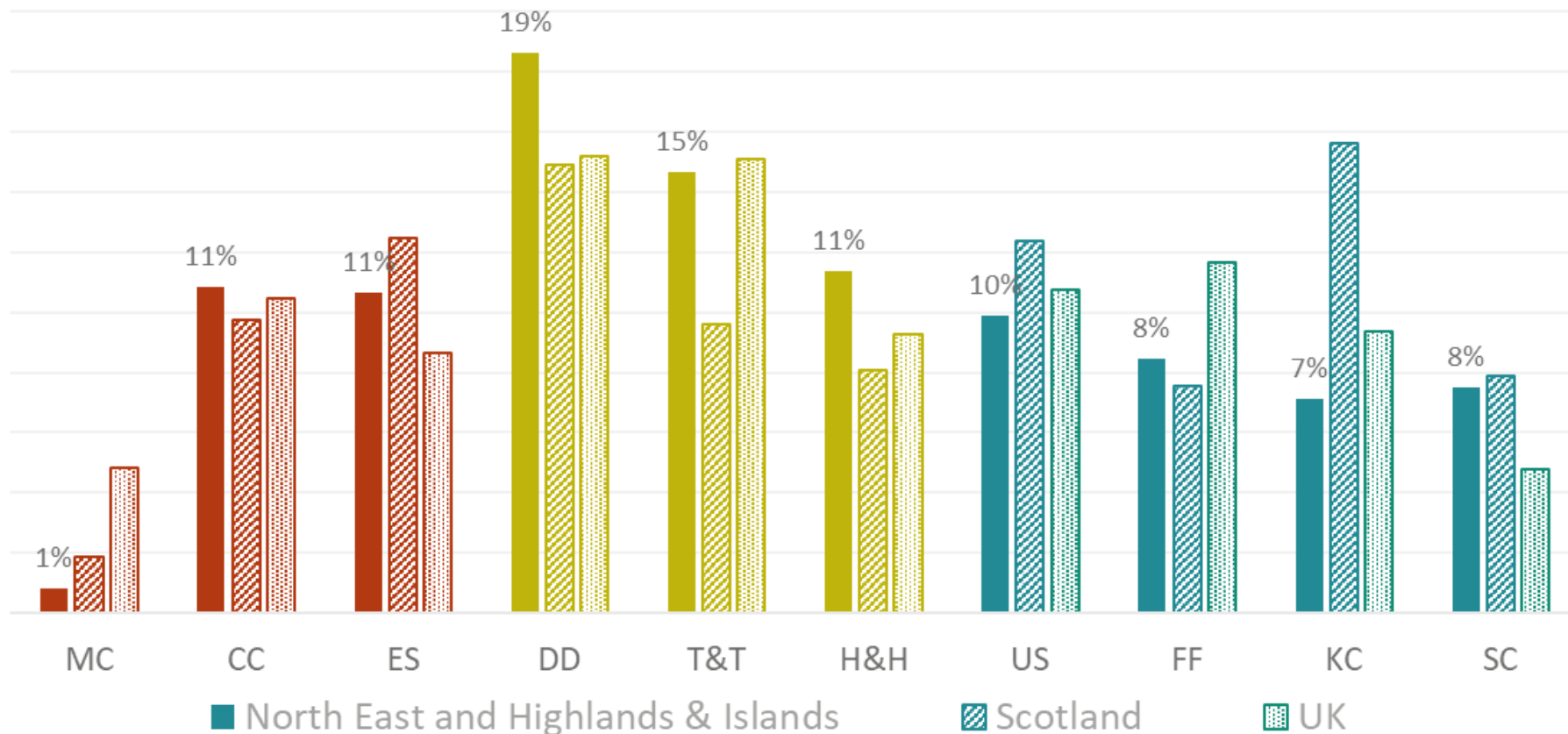


Count of households by postal sector



Overall Population Audience Spectrum Profile

Medium-engaged segments make 45% of the population
Audience Spectrum profile for households (2021 estimate)

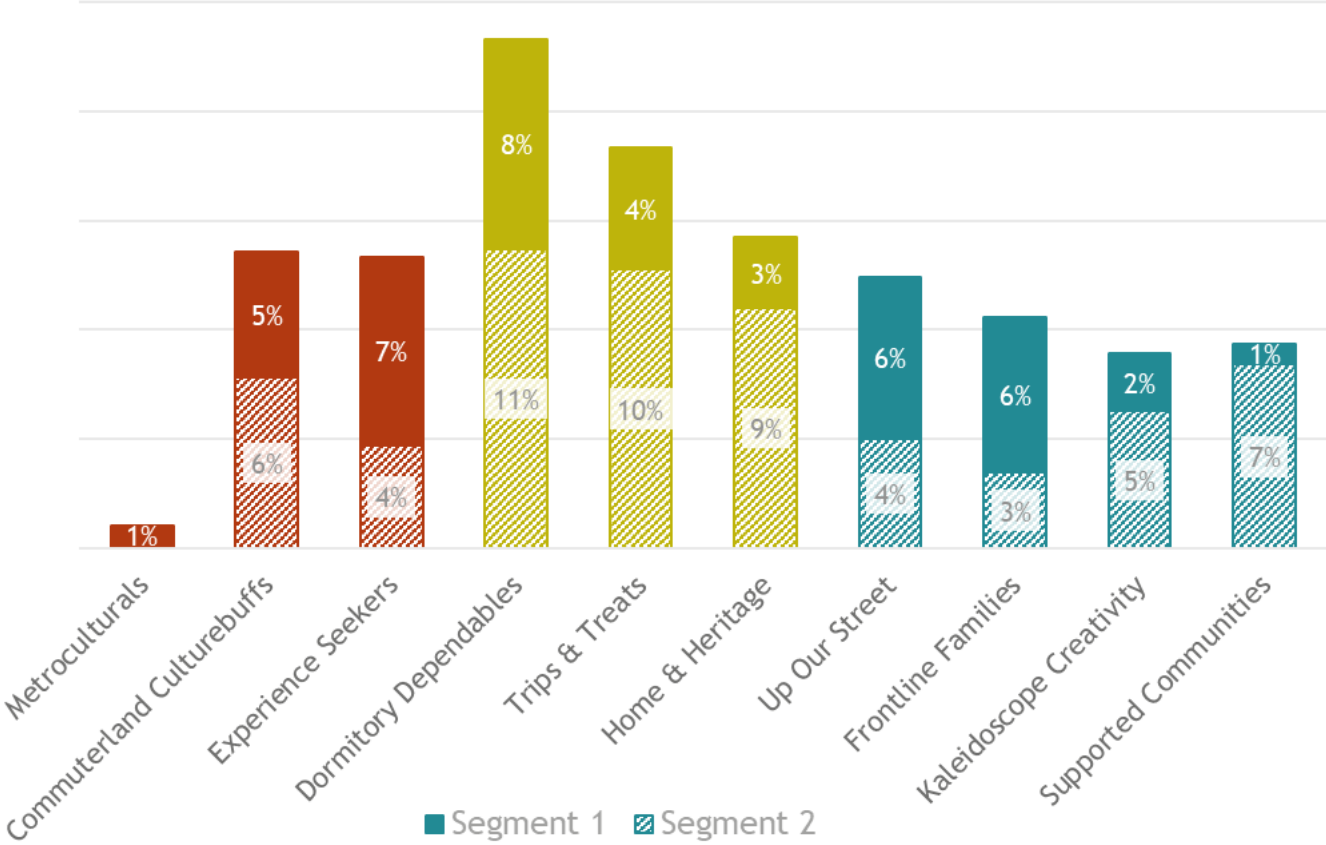


Audience Spectrum Types:

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

Overall Audience Spectrum Profile: Enhanced

North East and Highlands & Islands Enhanced Audience Spectrum Profile



Dormitory Dependables | D1

Settled, comfortable residents, enjoying regional life..

Dormitory Dependables | D2

Commuter-town families, investing for the future.

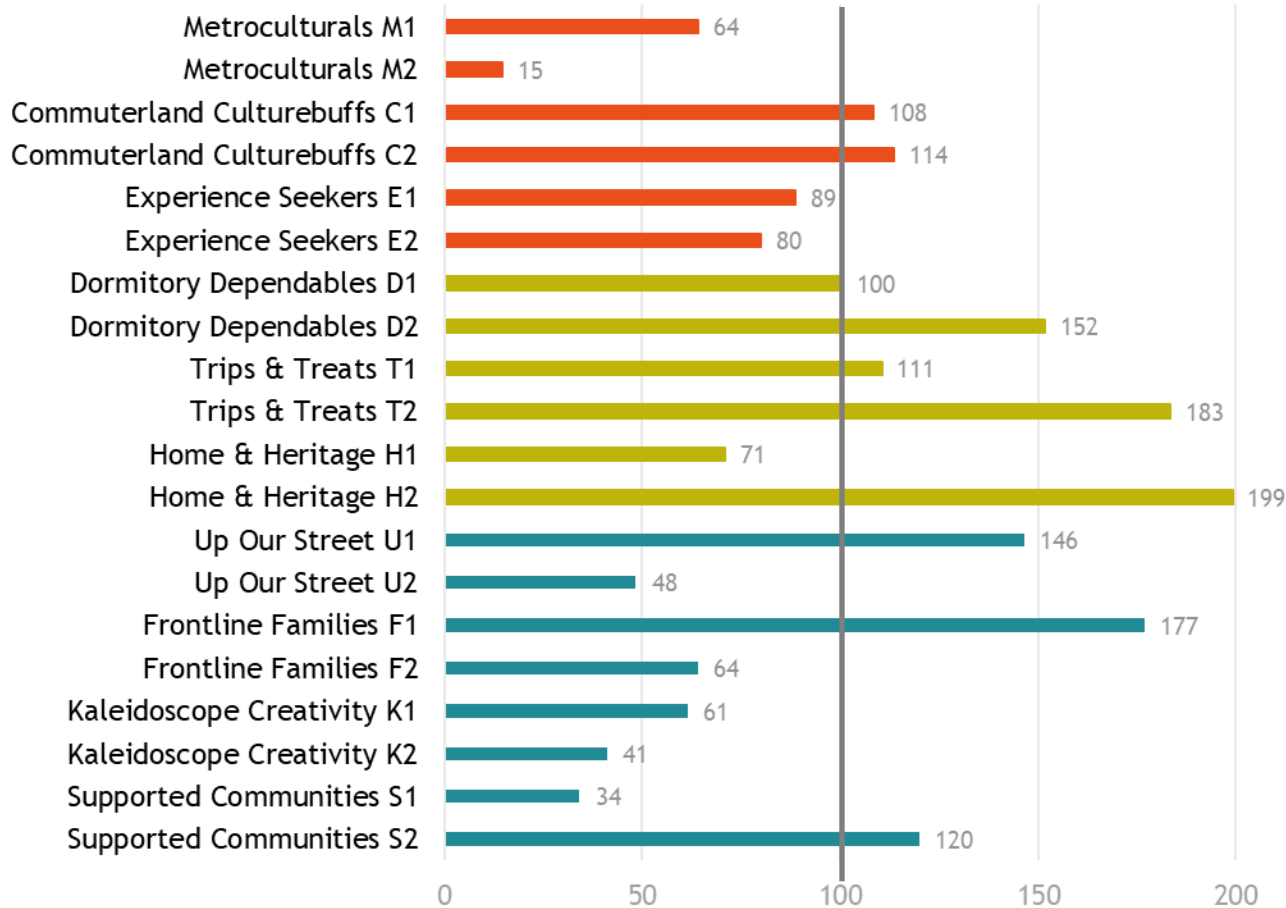
Trips & Treats | T2

Settled suburban families with established lifestyles.

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

Population Audience Spectrum Subsegment Profile cf. Scotland

NE Scotland and Highlands & Islands, cf. Scotland Overall



HIGHER for BOTH: CC, T&T

LOWER for BOTH: MC (esp. M1*), ES, KC

(*‘Younger, mobile and emerging metropolitan professionals’)

HIGHER for ONE:

D2 (not D1) - ‘settled comfortable residents, enjoying regional life’

T2 (esp.) - ‘settled families with established lifestyles’

H2 (lower H1) - ‘affluent residents of rural idylls’

U1 (lower U2) - ‘middle-aged inhabitants of semis on the edge of town’

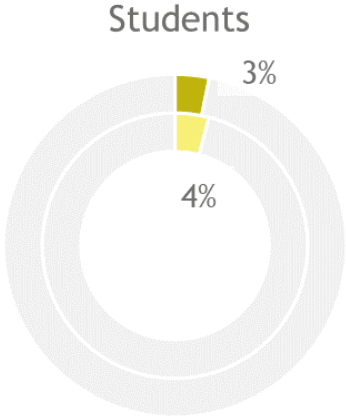
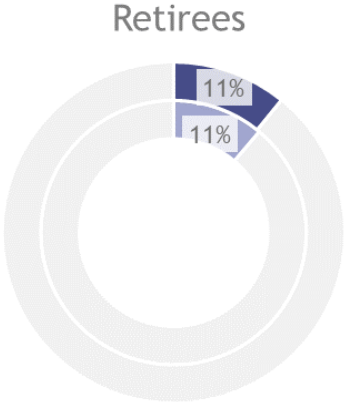
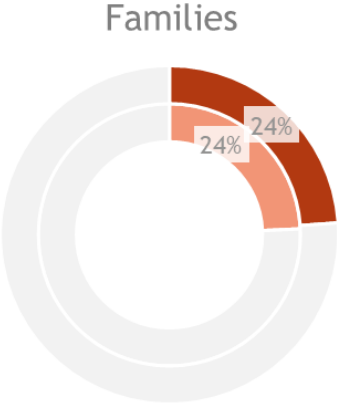
F1 (lower F2) - ‘older families, getting by despite challenges’

S2 (lower S1) - ‘elderly residents of sheltered housing with declining health’.

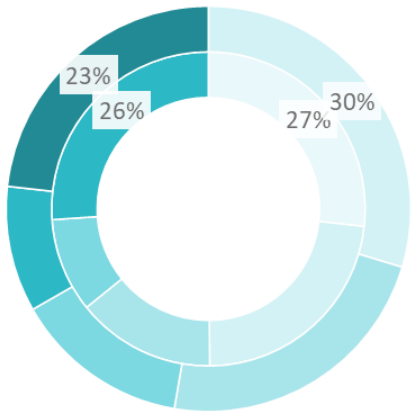
Population data – compared to rest of country

Outer ring: NE & H&I

Inner ring: Scotland

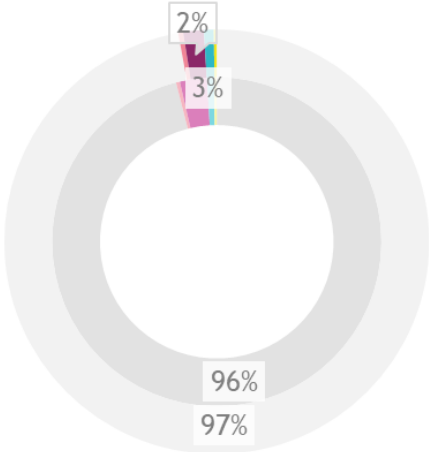


Education

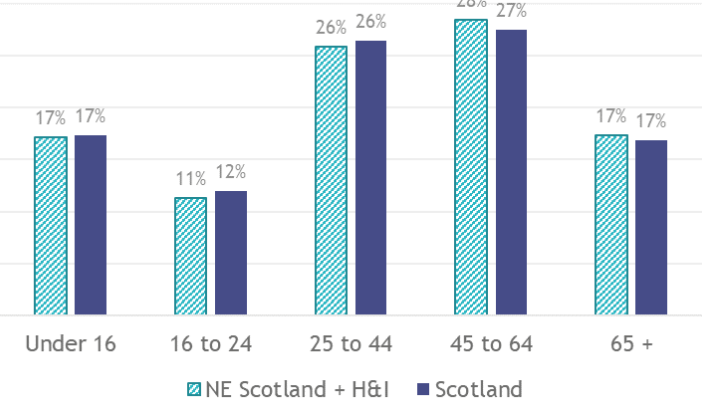


- No qualifications
- GCSEs graded D-G, Foundation diploma
- GCSEs graded A*-C, Higher diploma
- AS and A Levels, Advanced and Progression diploma
- Higher Education and Higher diplomas

Ethnic groups



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



More diverse postal sectors include Old Aberdeen and Seaton (Aberdeen), King Street (Aberdeen), Rosemount (Aberdeen)

Population data – comparing the local areas

Aberdeenshire: highest* Dormitory Dependables, Trips & Treats

Highland: highest proportion of families

Aberdeen City: highest Metroculturals and Experience Seekers, Asian and Asian British, students, highest qualifications

Moray: highest proportion of highly deprived areas

Argyll and Bute: highest retirees, Commuterland Culturebuffs, Home & Heritage

Na h-Eileanan Siar: highest level of disability or long-term health issue.

*proportion out of the population

961k total:

256k Aberdeenshire

232k Highland

222k Aberdeen City

93k Moray

88k Argyll and Bute

27k Na h-Eileanan Siar

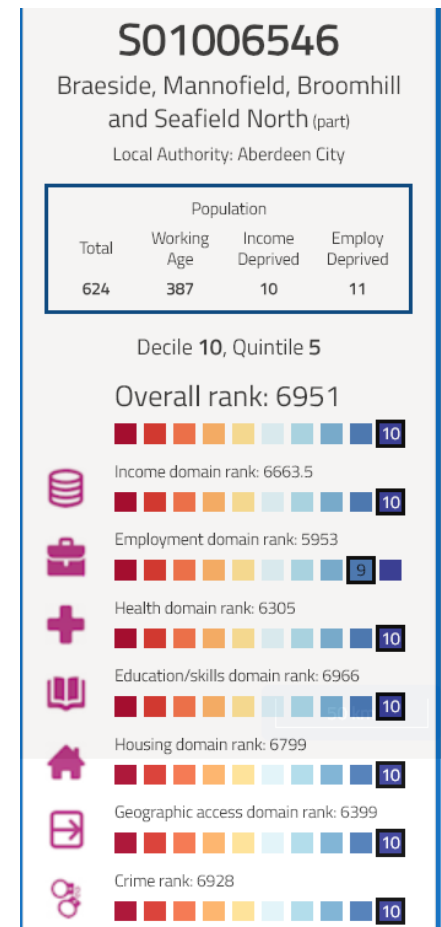
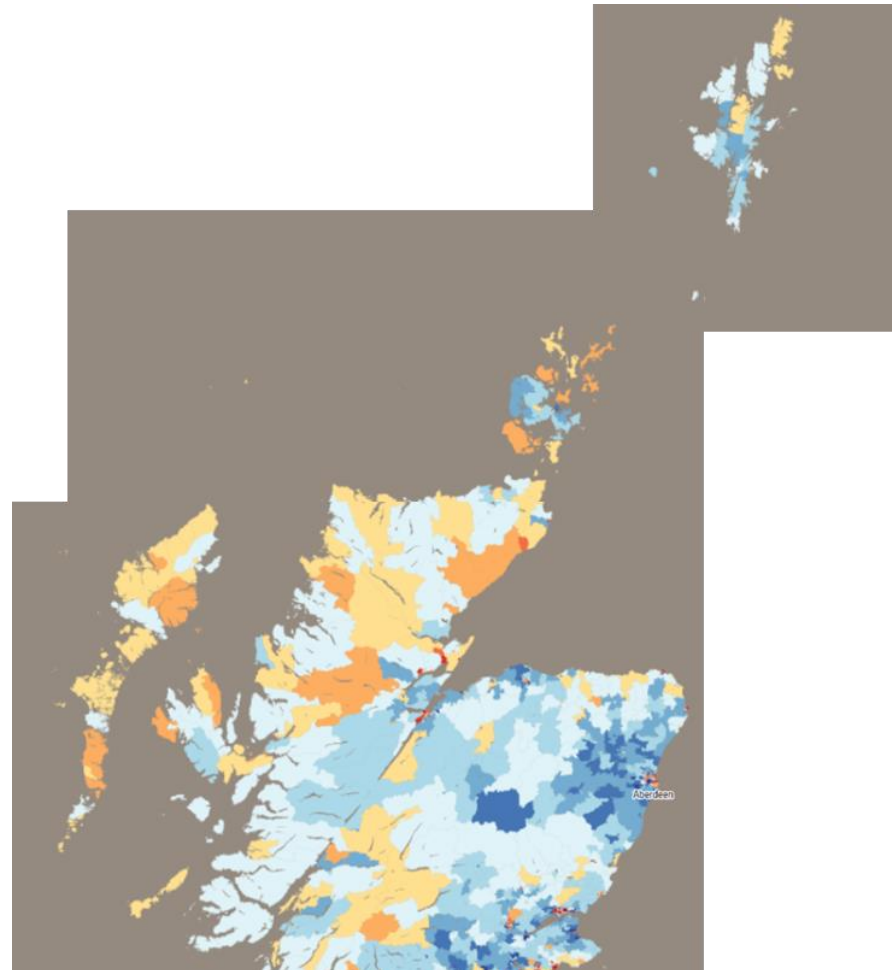
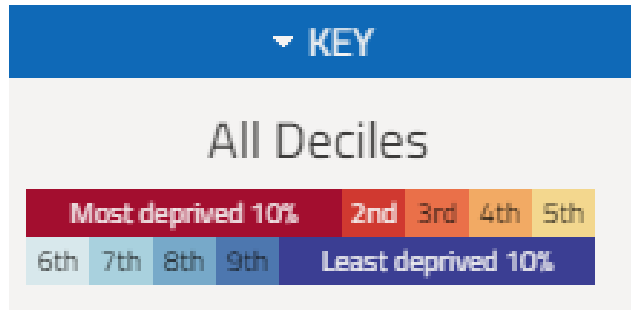
23k Shetland Islands

21k Orkney Islands

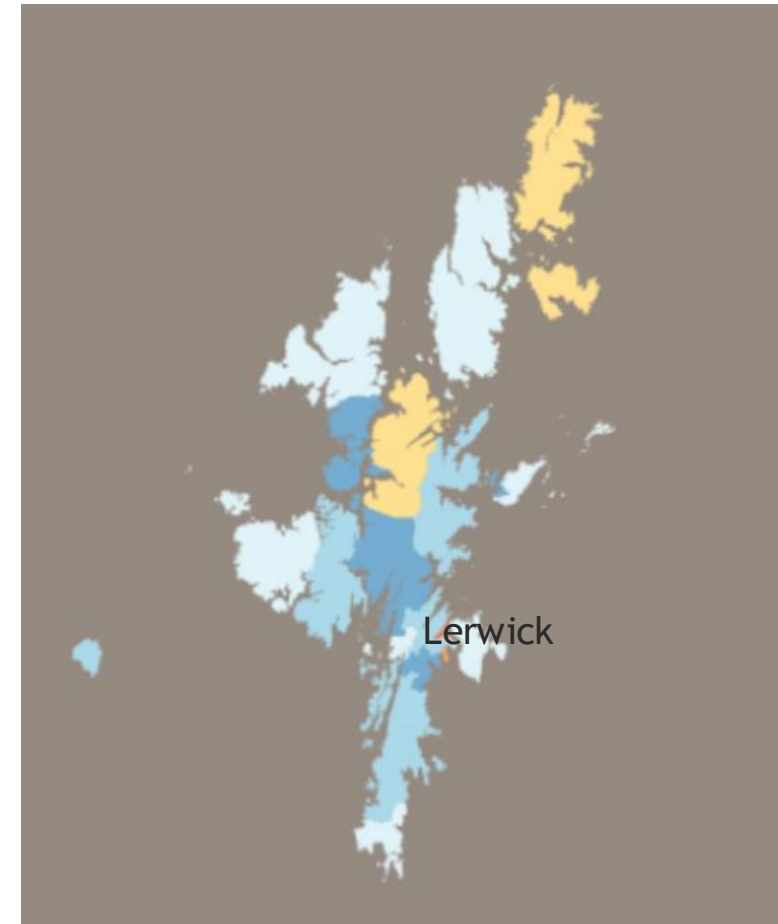
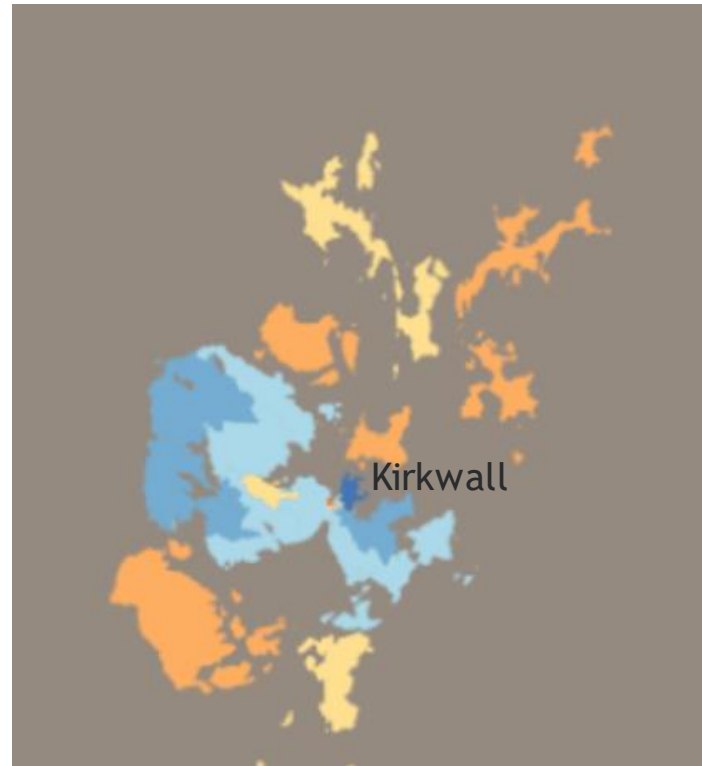
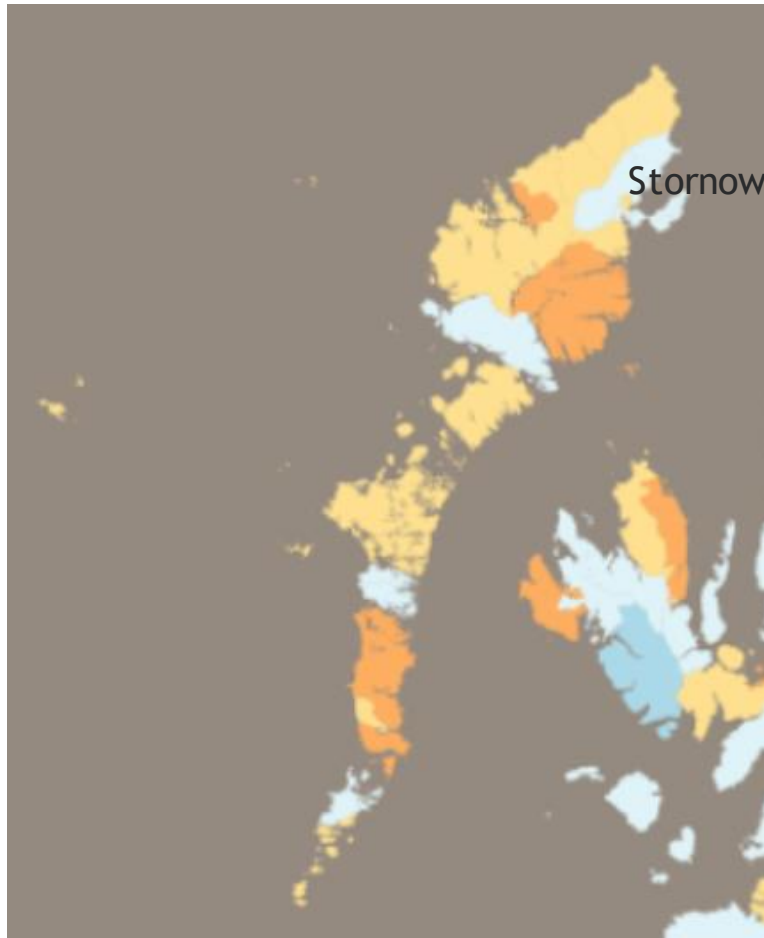


Population data – Indices of Multiple Deprivation

<https://simd.scot>



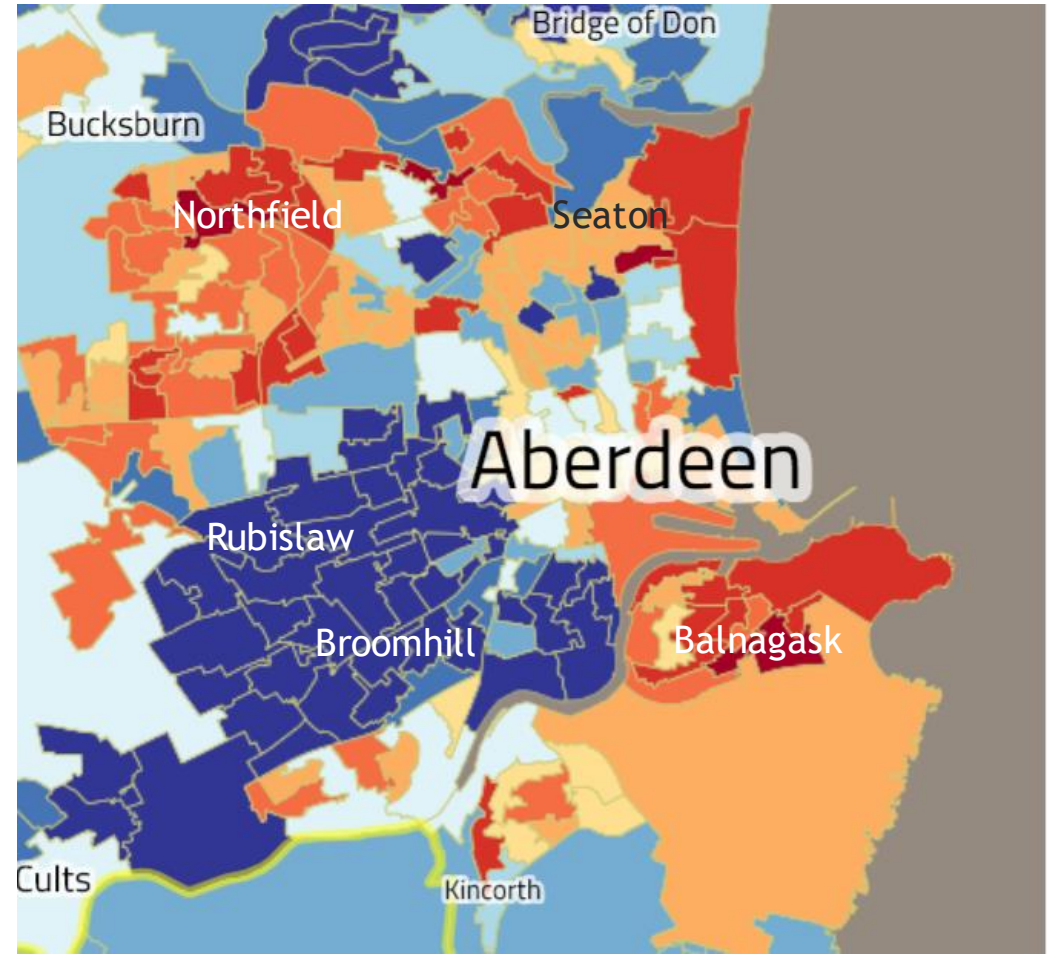
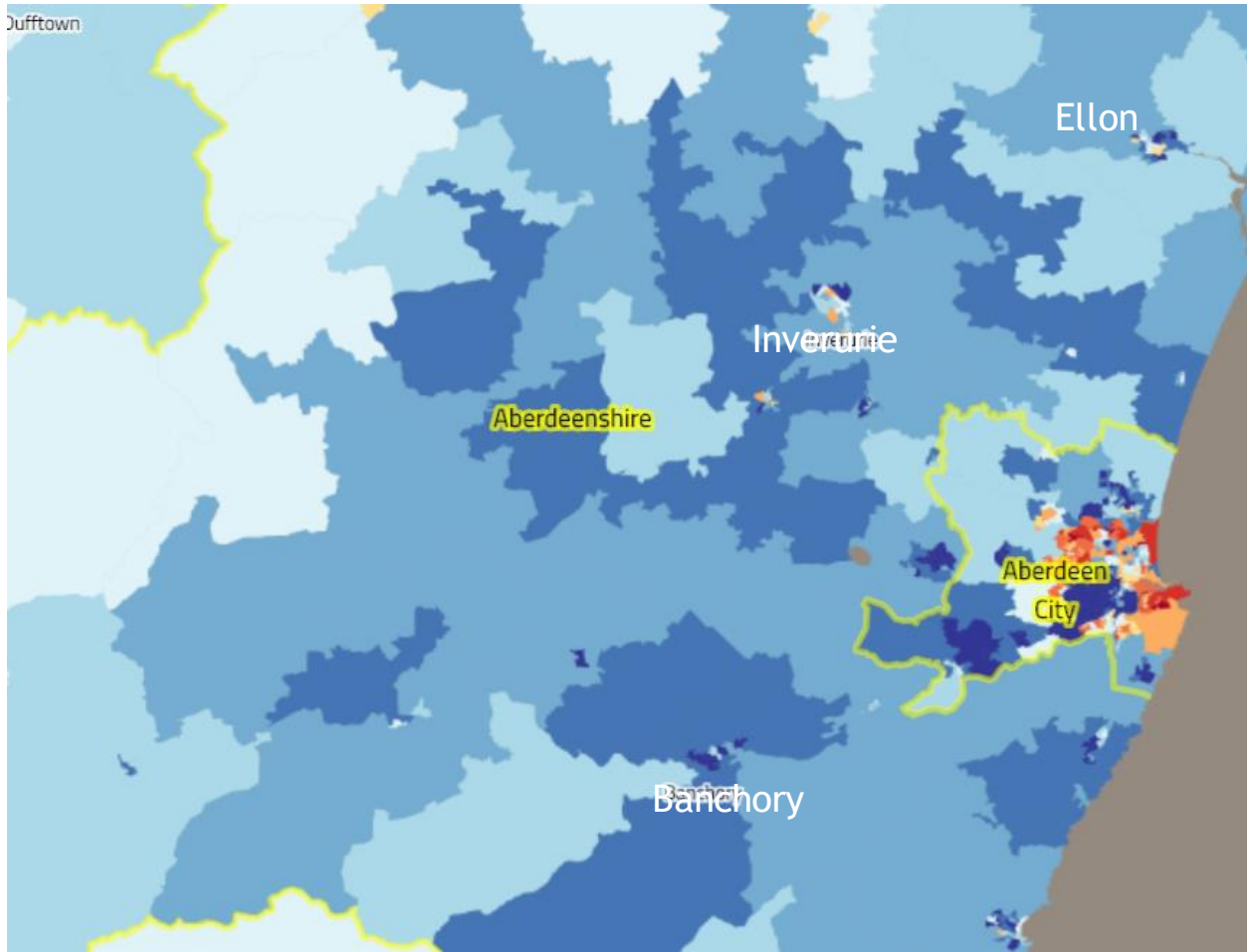
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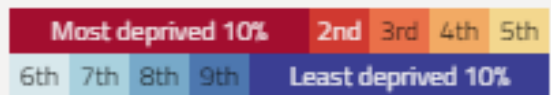
All Deciles



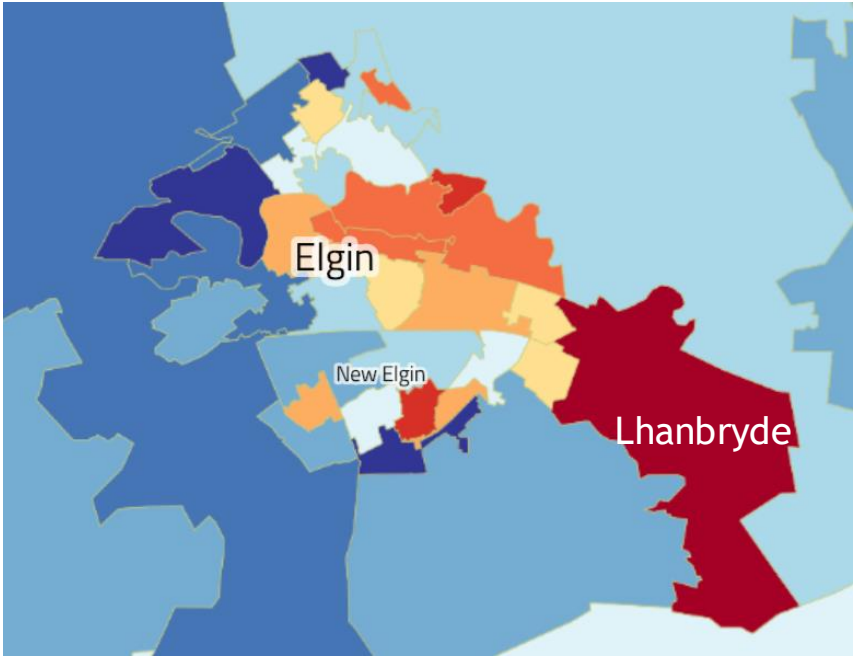
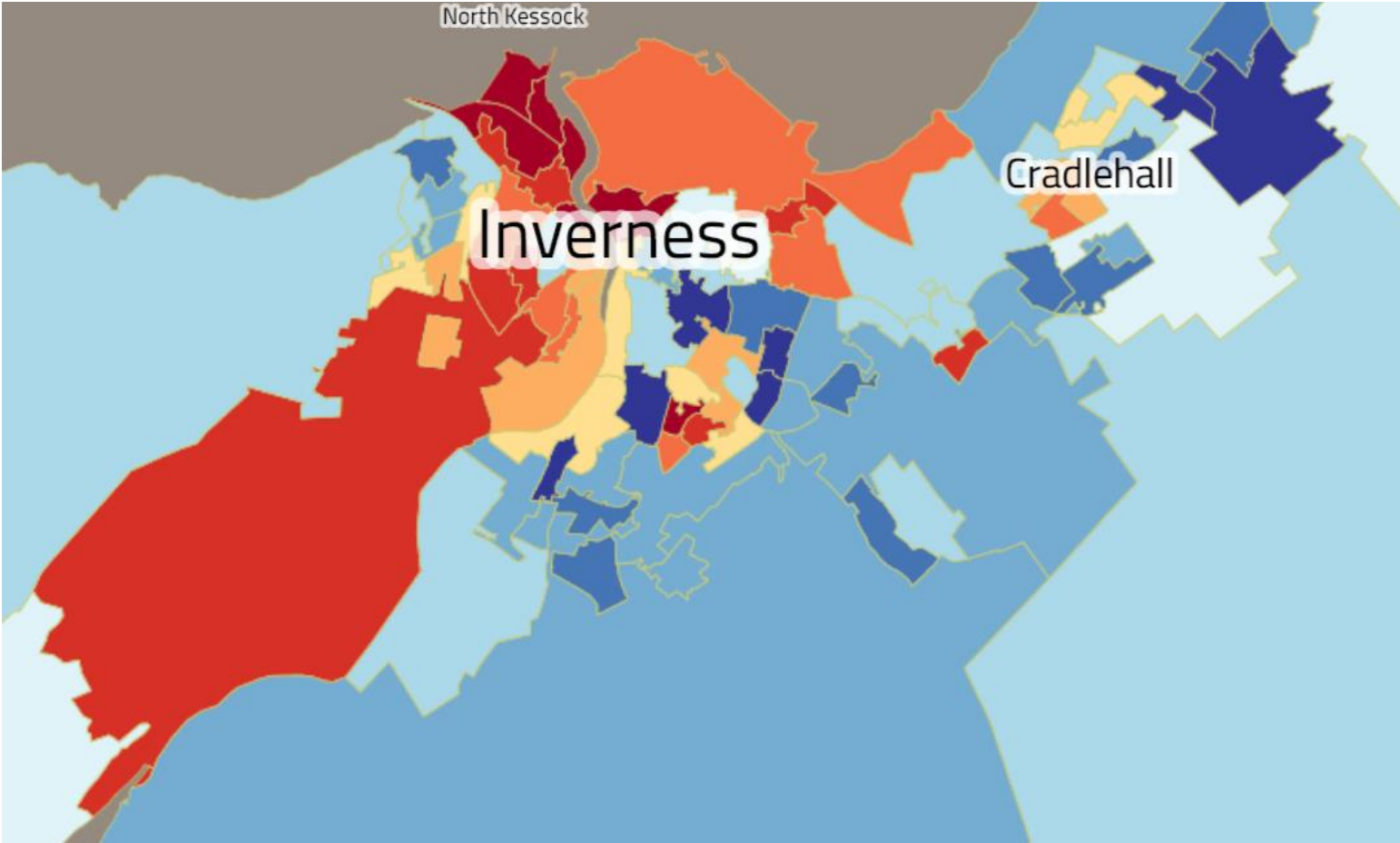
Population data – Indices of Multiple Deprivation



All Deciles



Population data – Indices of Multiple Deprivation



Where do family groups live?

% of population families

0% - 12%

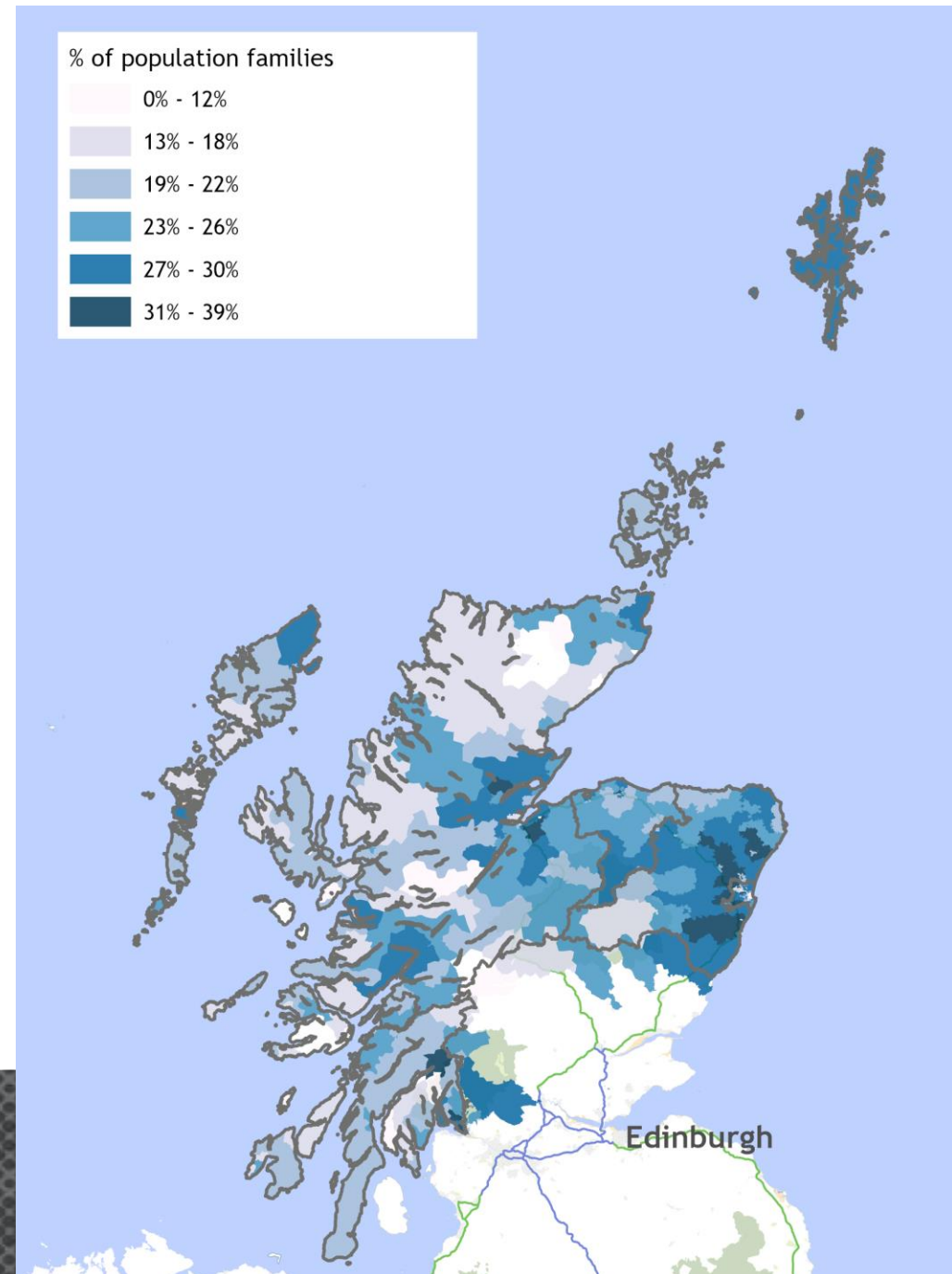
13% - 18%

19% - 22%

23% - 26%

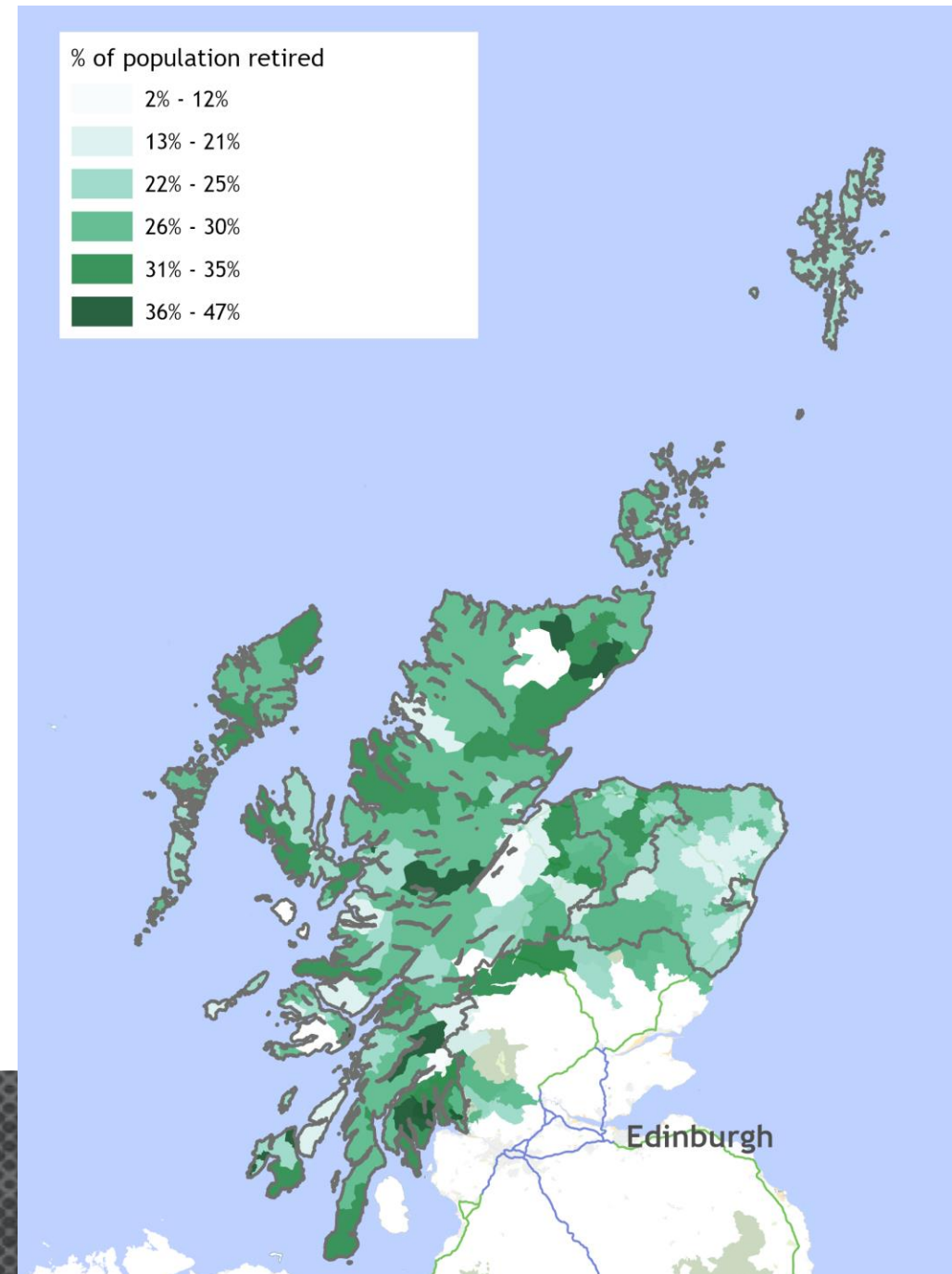
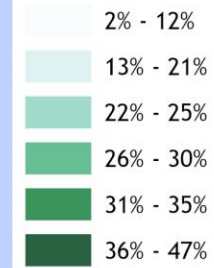
27% - 30%

31% - 39%



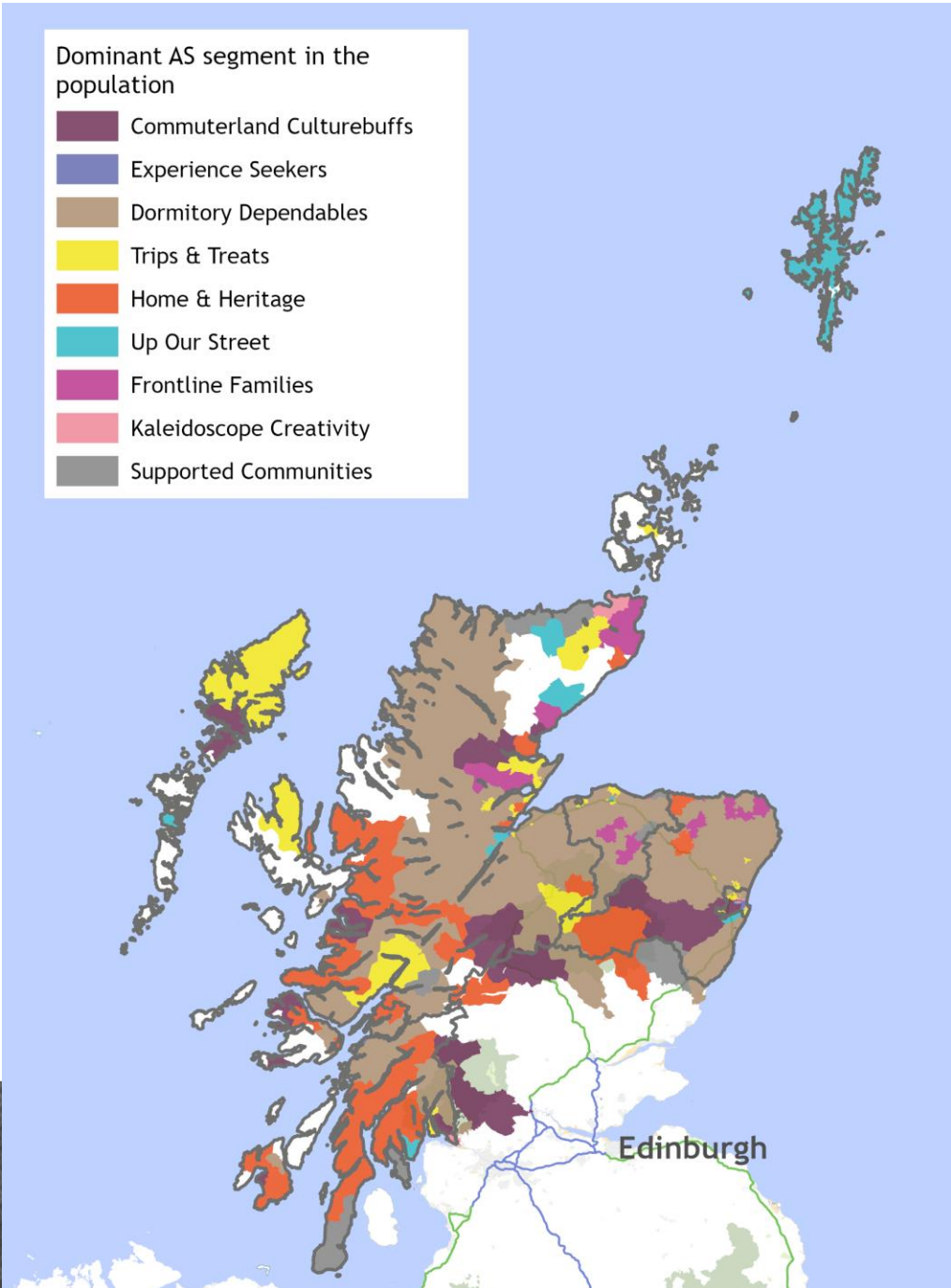
Where do retirees live?

% of population retired



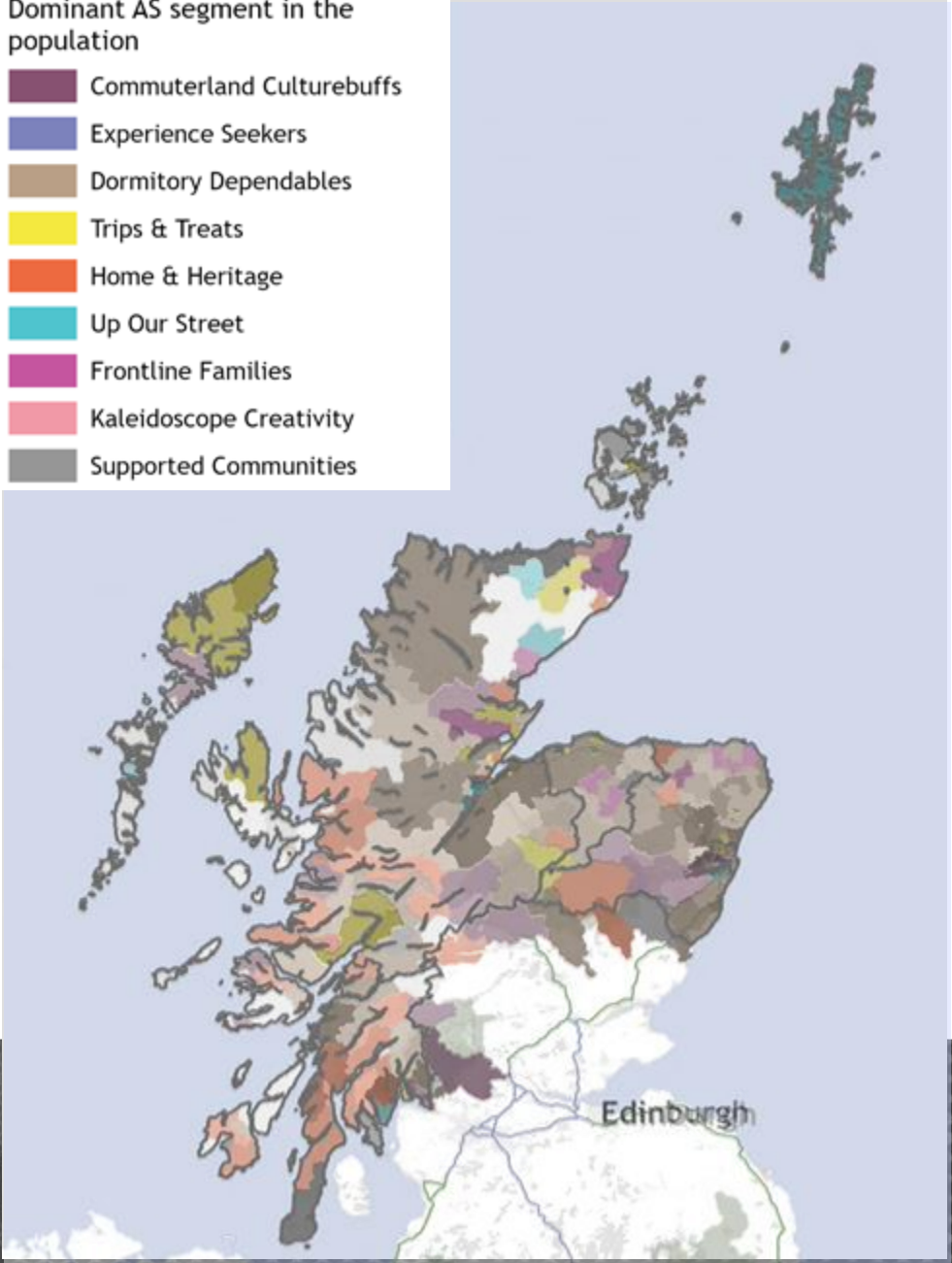
Dominant Audience Spectrum segment by postal sector - Population

- Dominant AS segment in the population
- Commuterland Culturebuffs
 - Experience Seekers
 - Dormitory Dependables
 - Trips & Treats
 - Home & Heritage
 - Up Our Street
 - Frontline Families
 - Kaleidoscope Creativity
 - Supported Communities

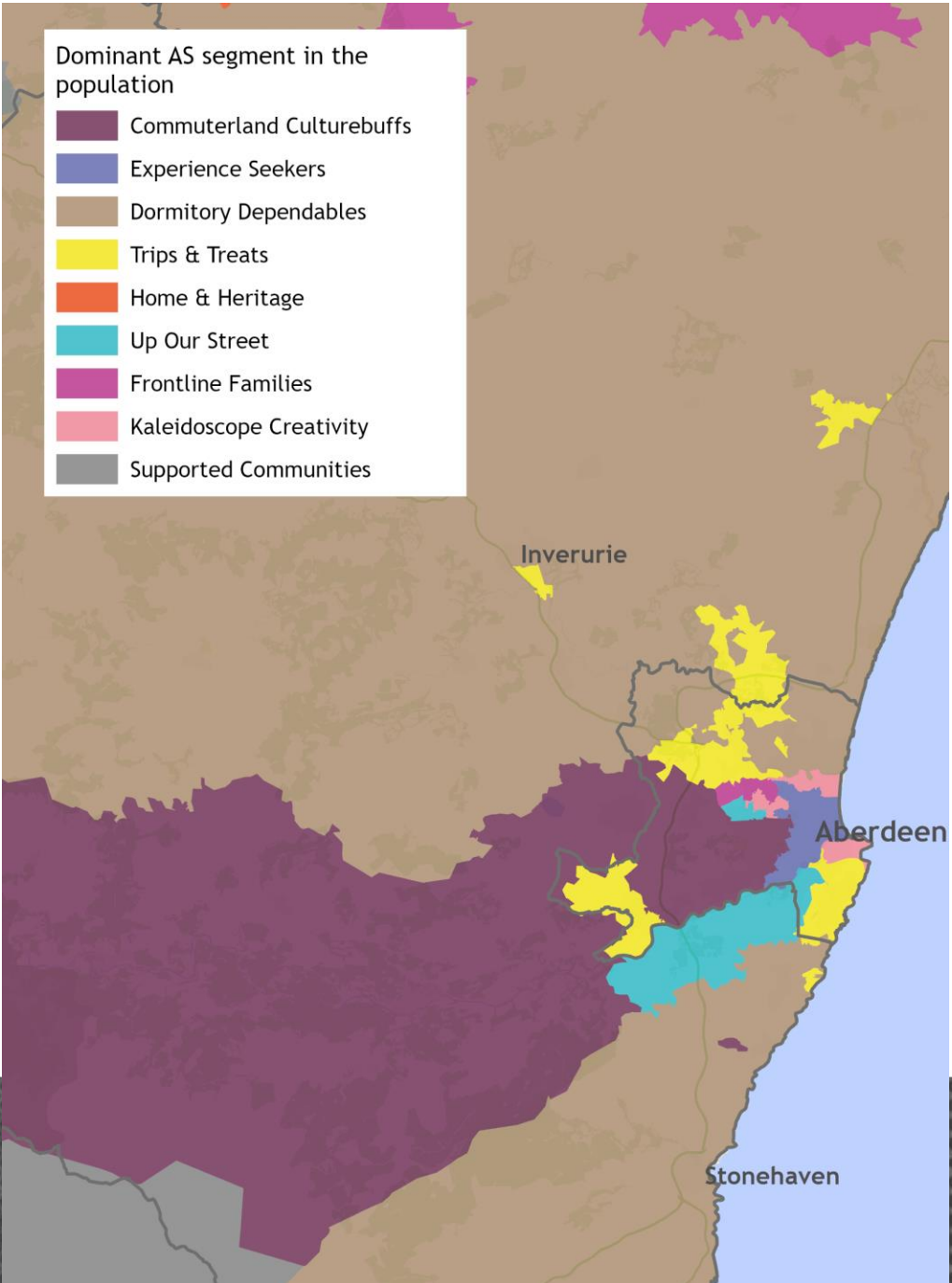


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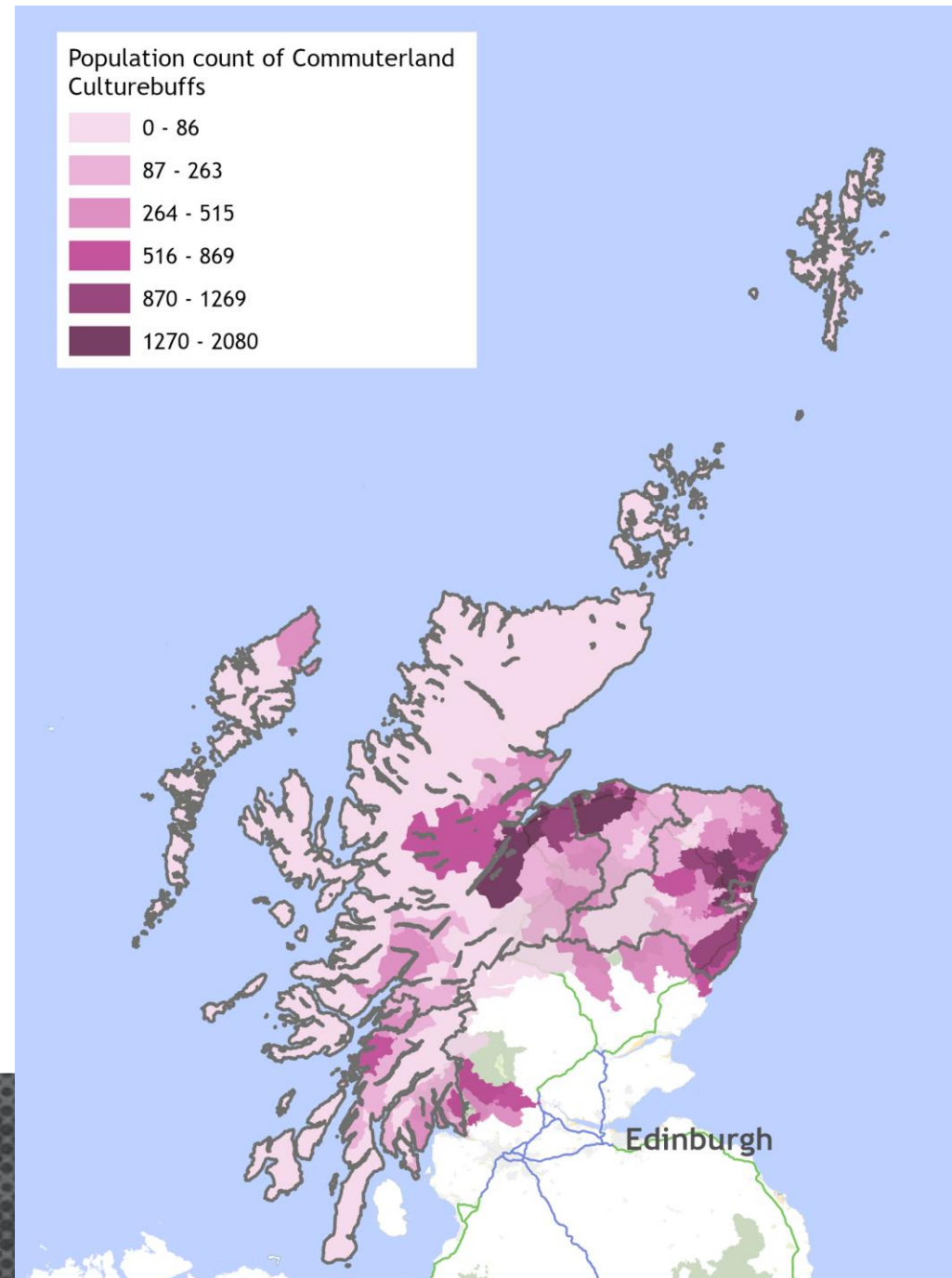
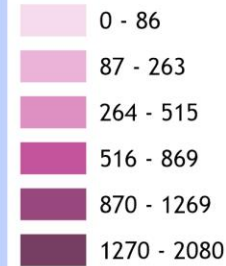


Dominant Audience Spectrum segment by postal sector - Population

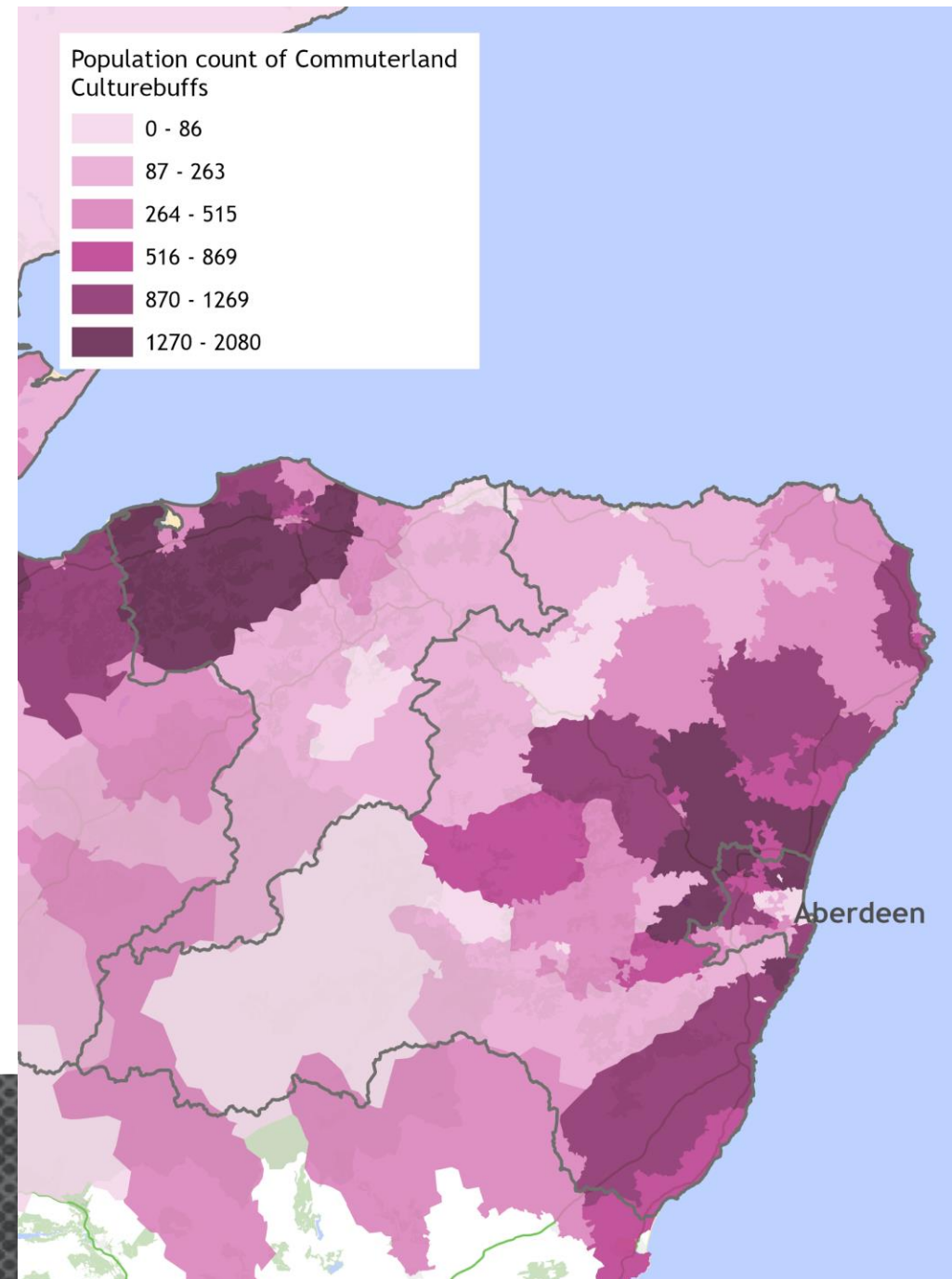


Where do Commuterland Culturebuffs live? – count by postal sector

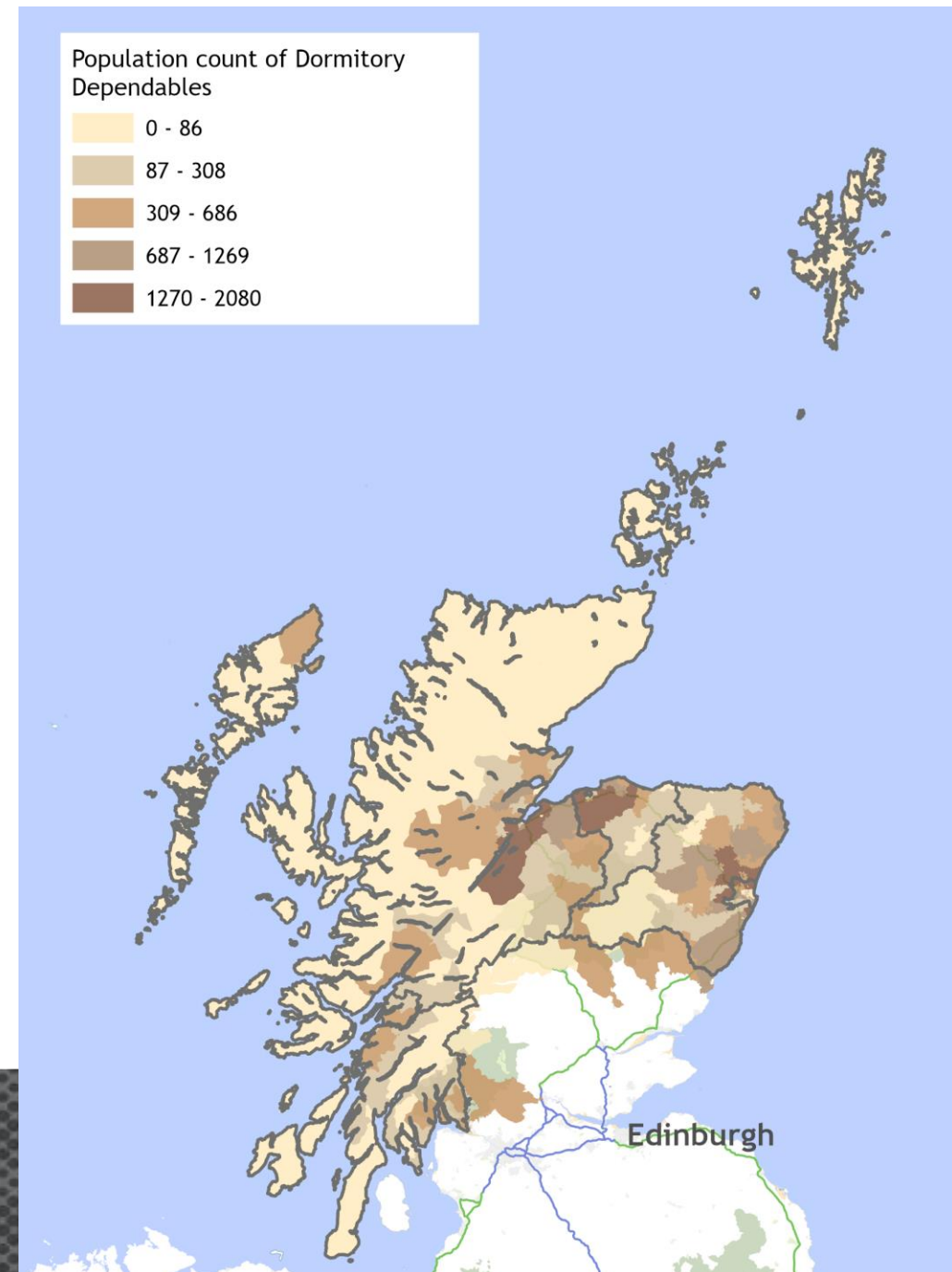
Population count of Commuterland
Culturebuffs



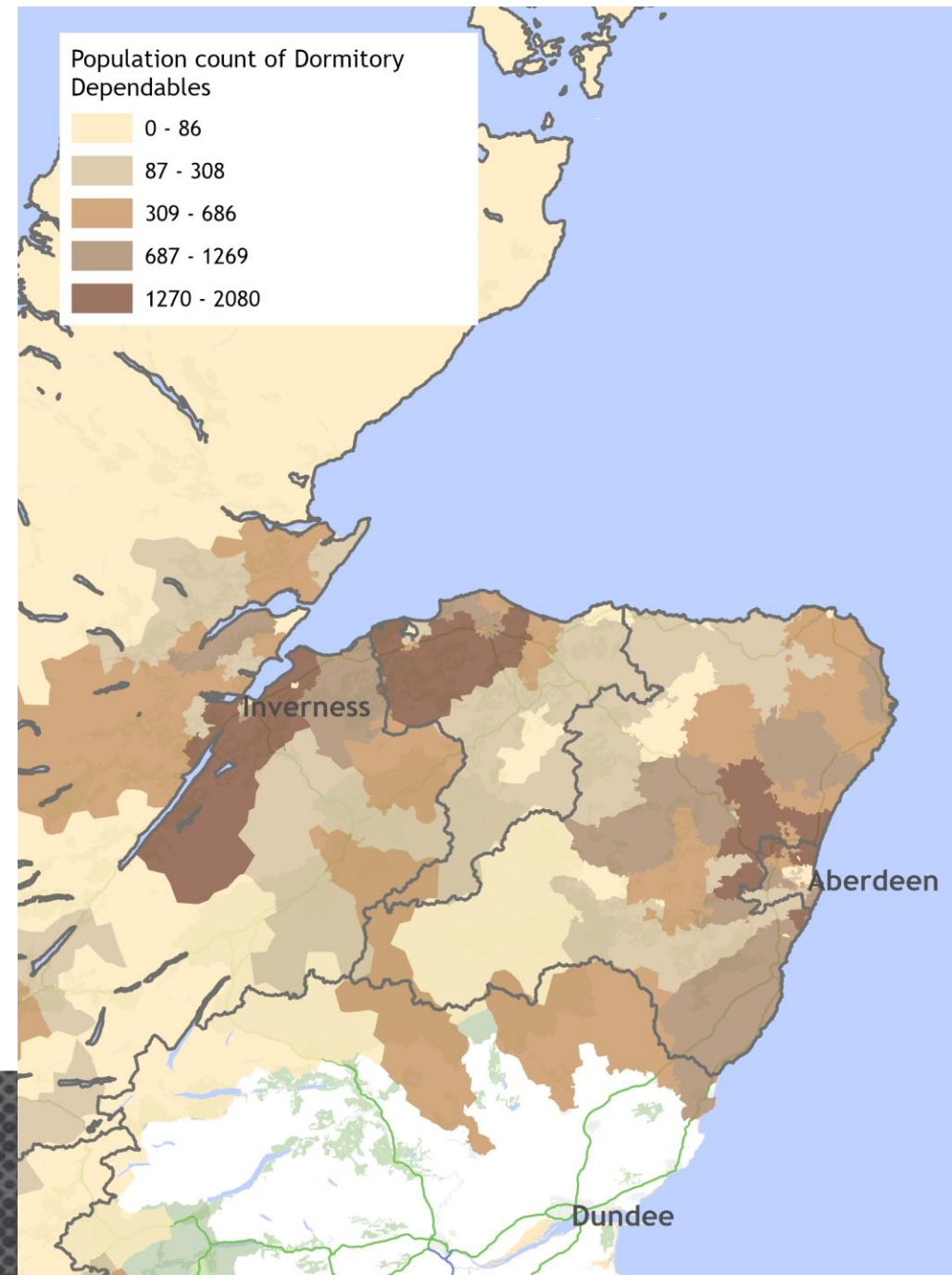
Where do Commuterland Culturebuffs live? – count by postal sector



Where do Dormitory Dependables live? – count by postal sector

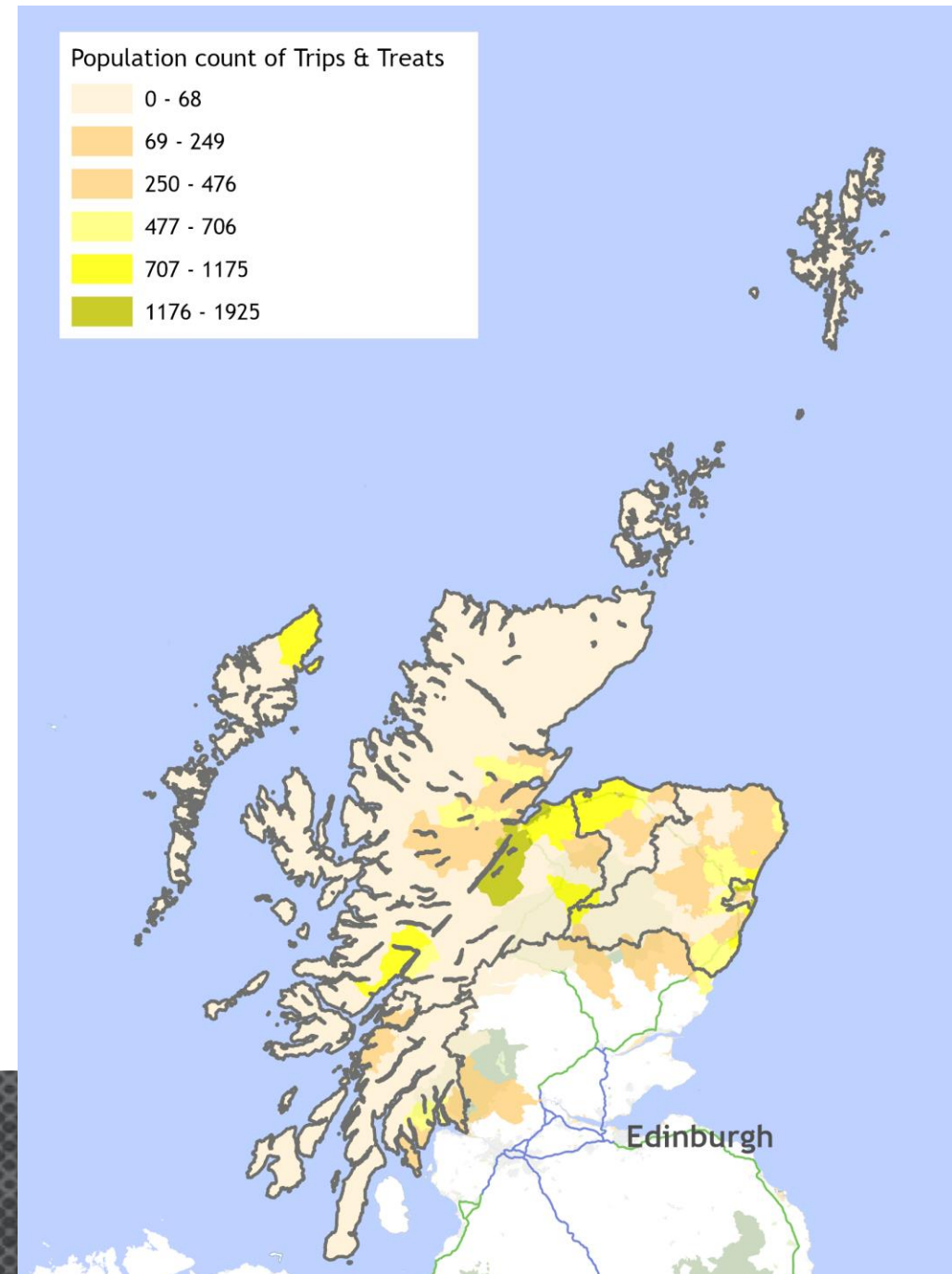
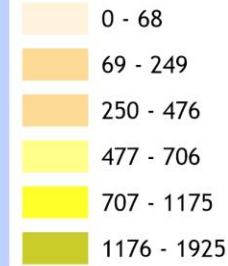


Where do Dormitory Dependables live? – count by postal sector

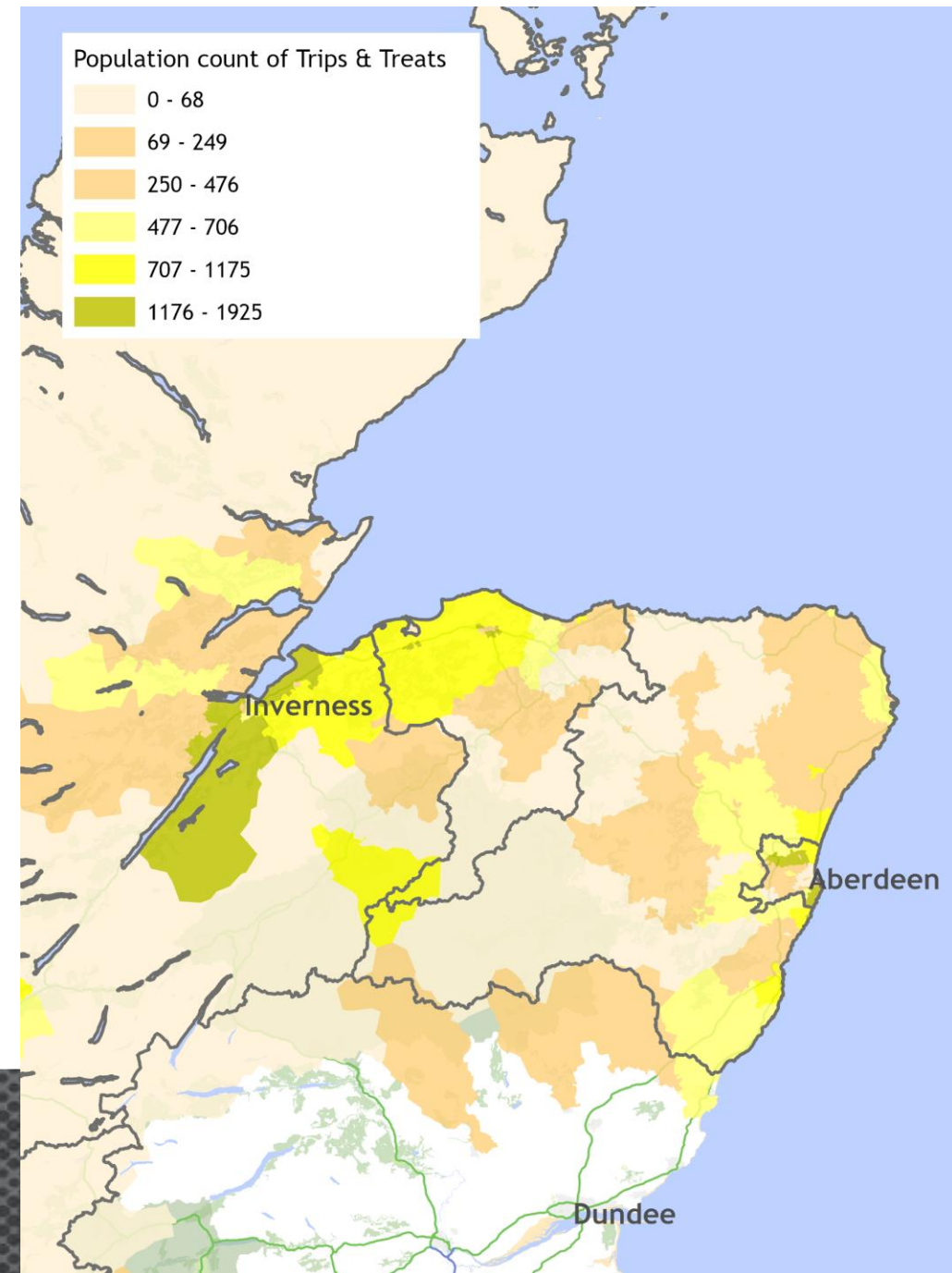


Where do Trips & Treats live? – count by postal sector

Population count of Trips & Treats



Where do Trips & Treats live? – count by postal sector

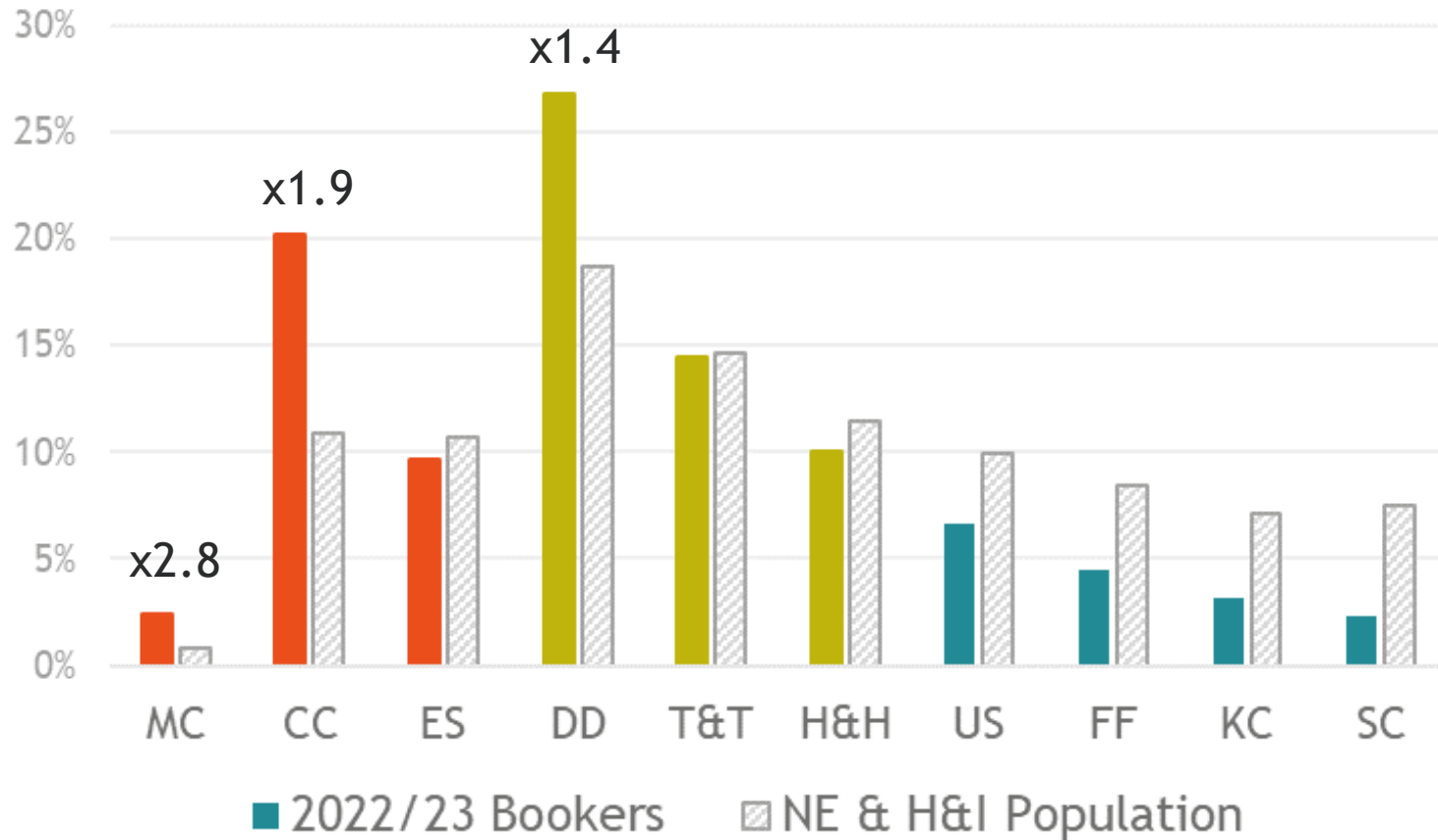


Postal Sectors with Highest % by Audience Spectrum

Segment	Highest	Second Highest	Third Highest
Metroculturals	Forest Avenue, Aberdeen (29%)	Ferryhill (South), Duthie Park, Aberdeen (22%)	Rosemount, Aberdeen (18%)
Commuterland Culturebuffs	Chapelton (73%)	Cults, Bielside (72%)	Strachan, Durris, Finzean (62%)
Experience Seekers	Ferryhill (North), Aberdeen (87%)	King Street, Aberdeen (82%)	Footdee, Aberdeen (72%)
Dormitory Dependables	Uryside (Incl Boynds) (67%)	Ellon (Incl Auchnagatt, Collieston) (56%)	New Deer, Greens (48%)
Trips & Treats	Laverock Braes Road, Laverock Braes Wynd, Grandhome (76%)	Bucksburn (33%)	Cove Bay, Cove (31%)
Home & Heritage	Ballater (Incl Braemar, Crathie, Balmoral) (56%)	Forgue, Drumblade, Ythanwells (44%)	Strathdon (Incl Glenbuchat, Corgarff) (40%)
Up Our Street	Sheddocksley, Mastrick, Aberdeen (26%)	Aberdeen (Incl Maryculter, Blairs) (24%)	Heathryfold, Cummings Park, Aberdeen (22%)
Frontline Families	Macduff, Aberdeen (76%)	Banff, Aberdeen (48%)	Heathryfold, Cummings Park, Aberdeen (36%)
Kaleidoscope Creativity	Aberdeen (Incl Old Aberdeen, Seaton) (65%)	Aberdeen (Incl Torry) (58%)	Aberdeen (Incl Woodside, Hayton) (57%)
Supported Communities	Scott Drive, Huntly (33%)	Broadsea, Fraserburgh (29%)	Cullen, Portknockie (27%)

Who is the local audience?

Audience Trends

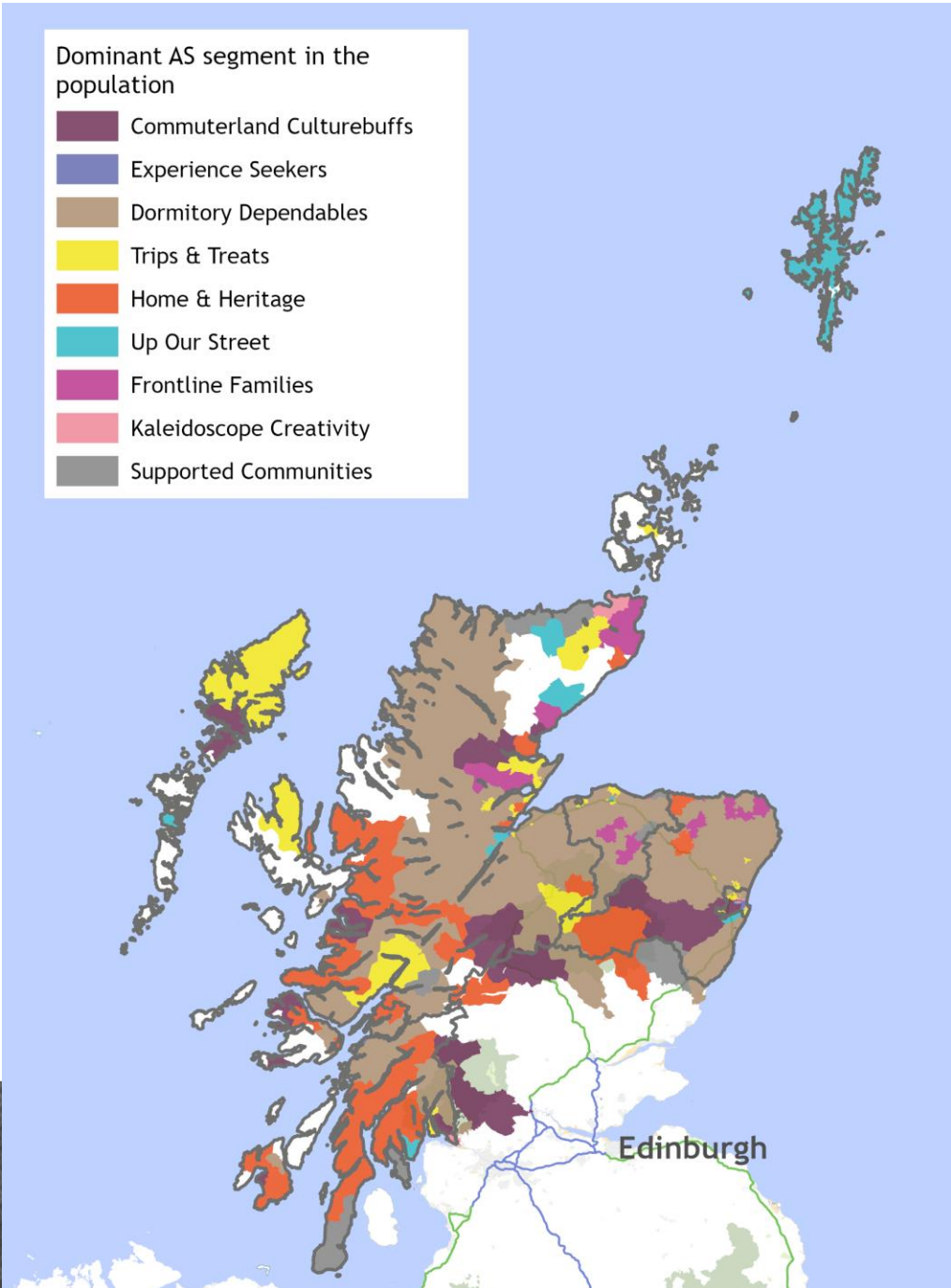


47% of bookers from top two segments: CC & DD

(cf. 29% of population)

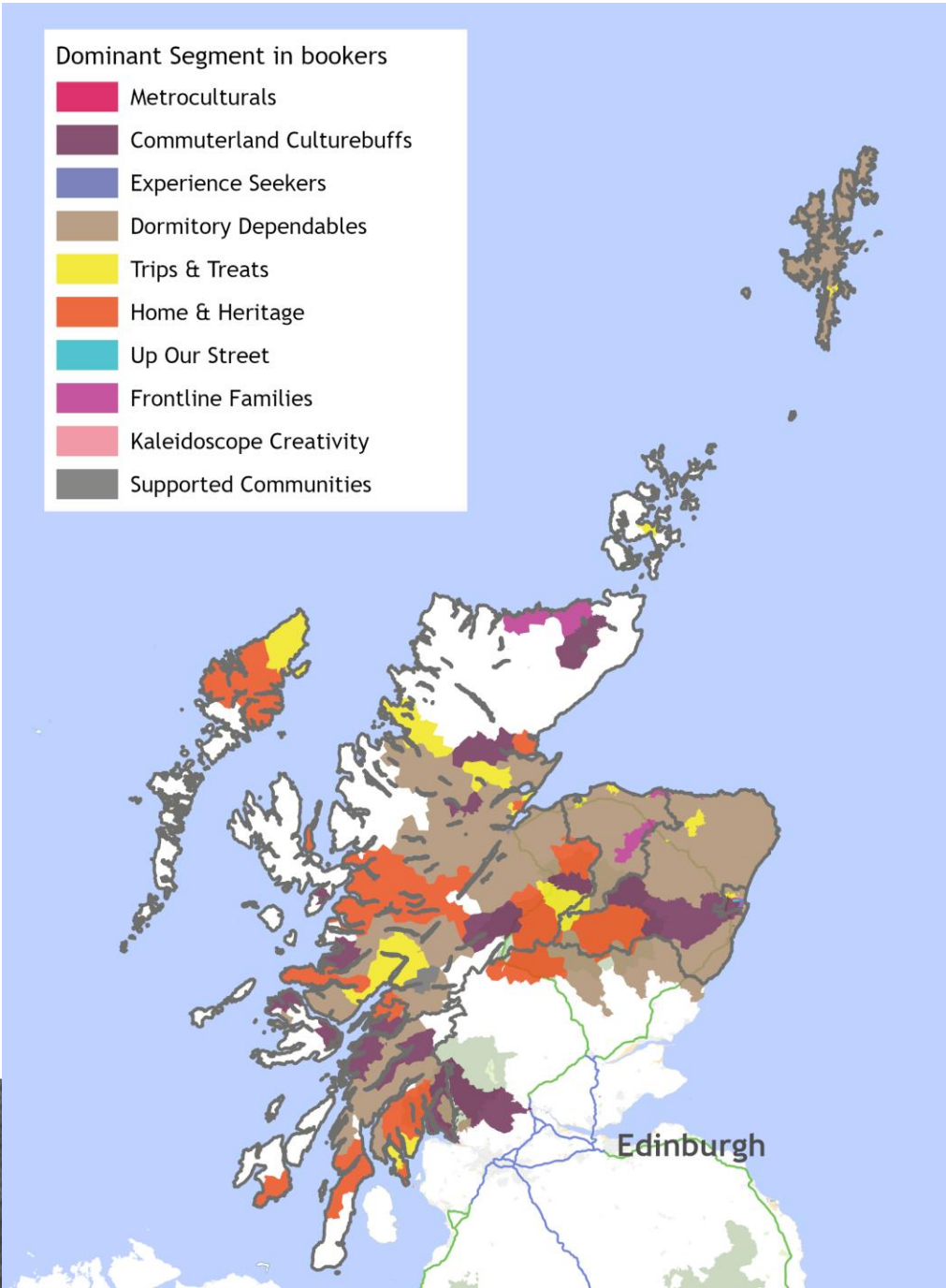
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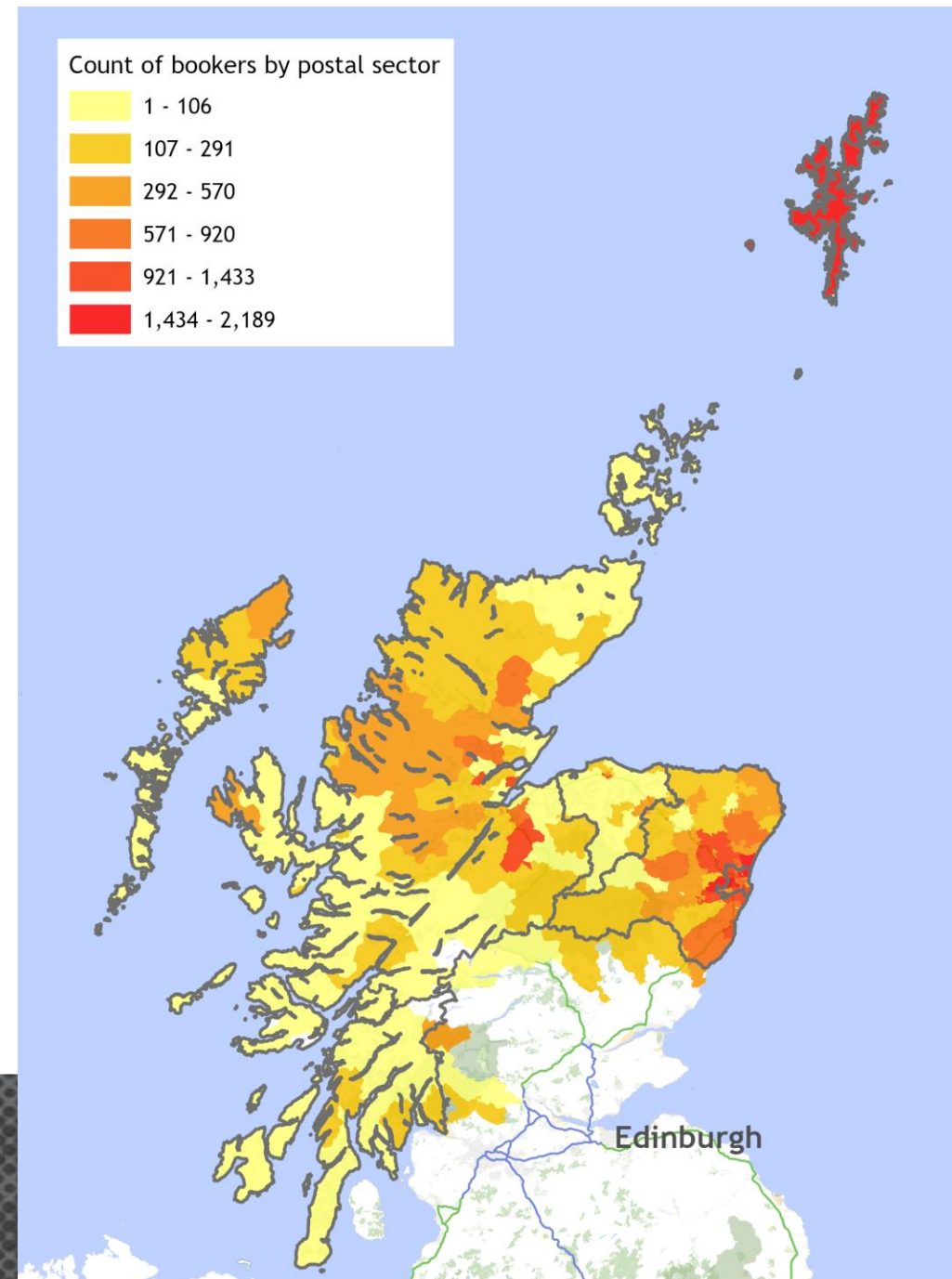


Dominant Audience Spectrum segment by postal sector - Bookers

(some areas blank b/c of insufficient data)

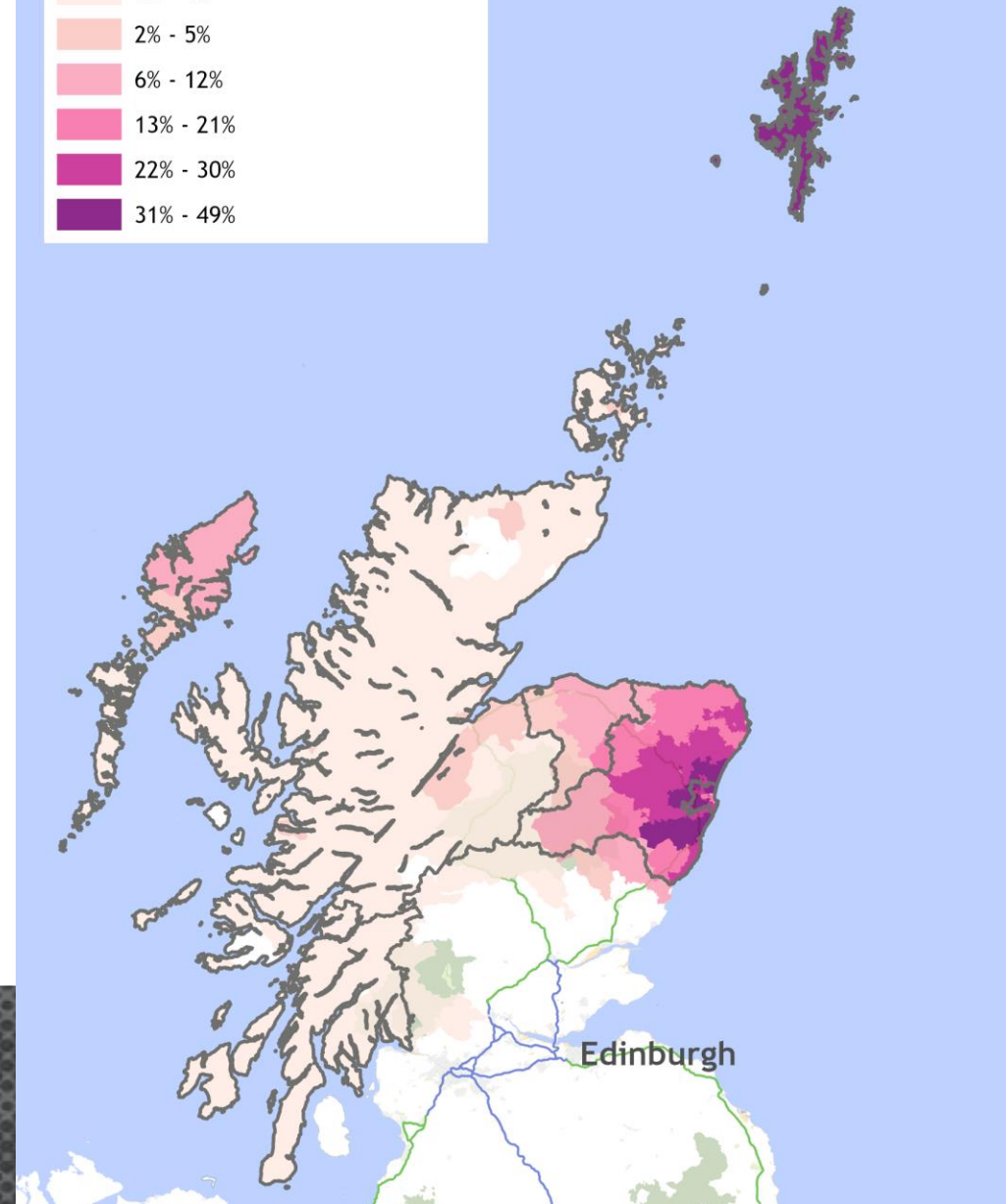
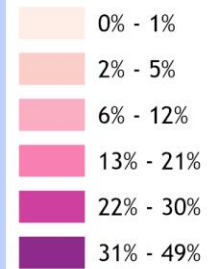


Where are bookers to
all venues coming
from?

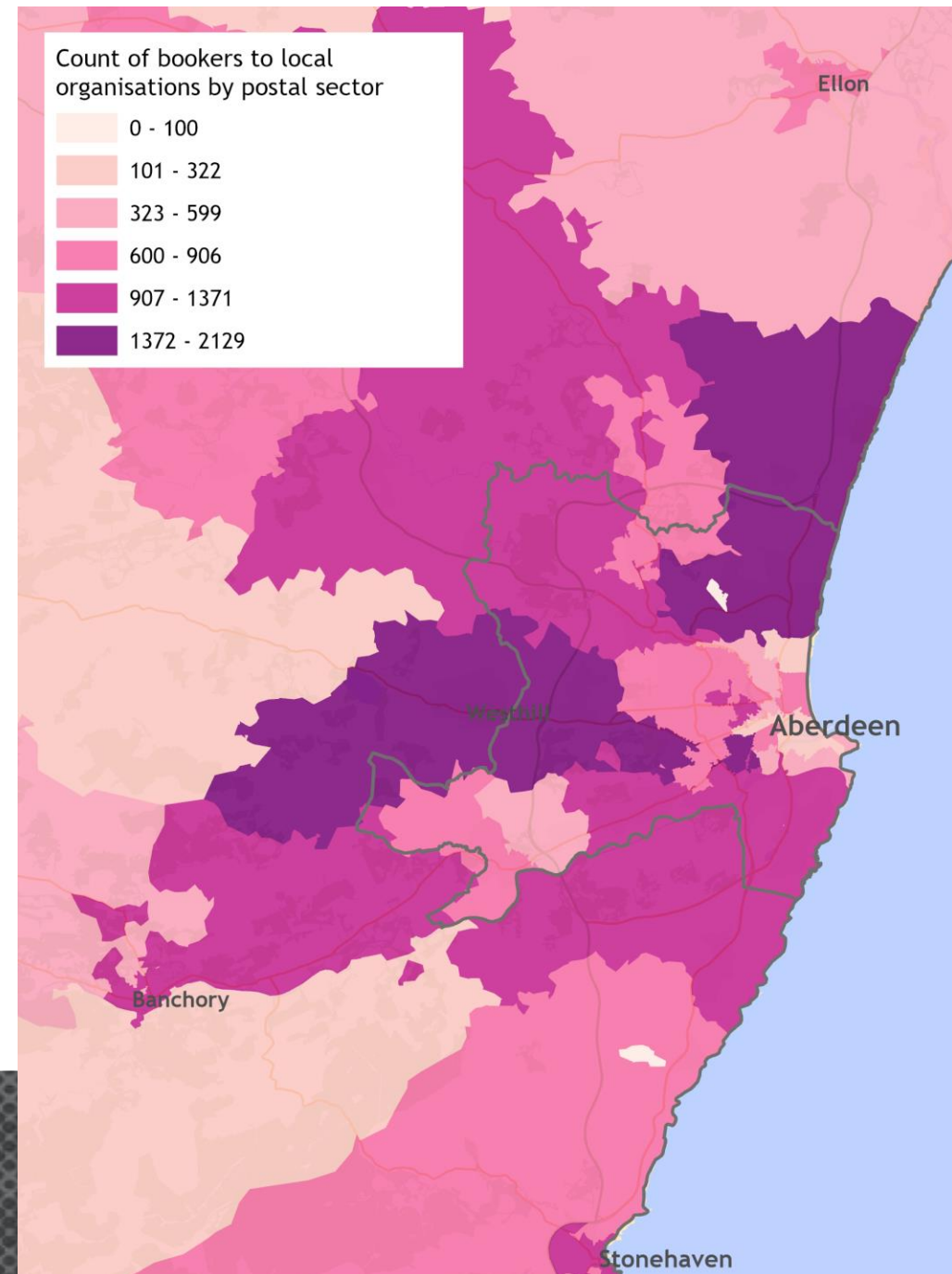


Where are bookers to only local venues coming from?

Booker penetration of local organisations by postal sector



Where are bookers to all venues coming from?



Local/Non-Local Audiences – AS profiles

Local bookers to non-local organisations are more likely to be **medium-engaged segments** cf. local bookers to local organisations (2022-23)



Changes in sales

Average sales across 2018-19/2019-20 cf. 2022/23

About Local Audiences

Local organisations

included:

In all data:

Aberdeen Performing

Arts

An Lanntair

Dance North Scotland

Shetland Arts

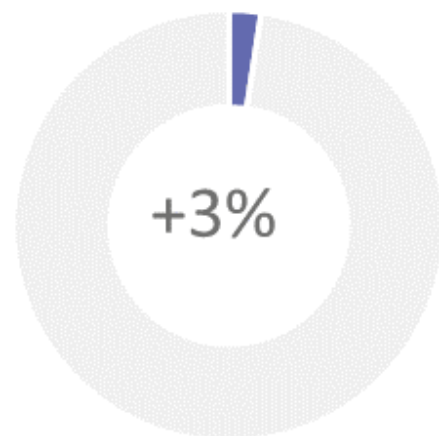
The Barn

In non-geographical data

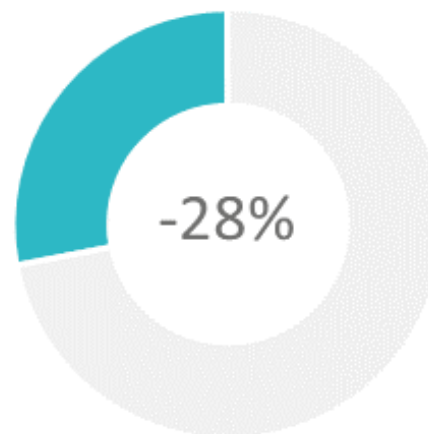
(no AS/mapped data):

Eden Court

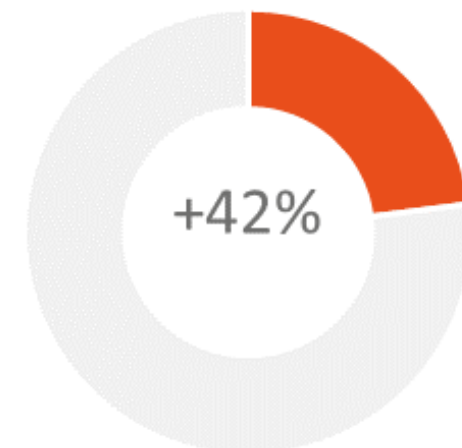
Local orgs - MORE
Tickets



Local orgs -
FEWER
Performances

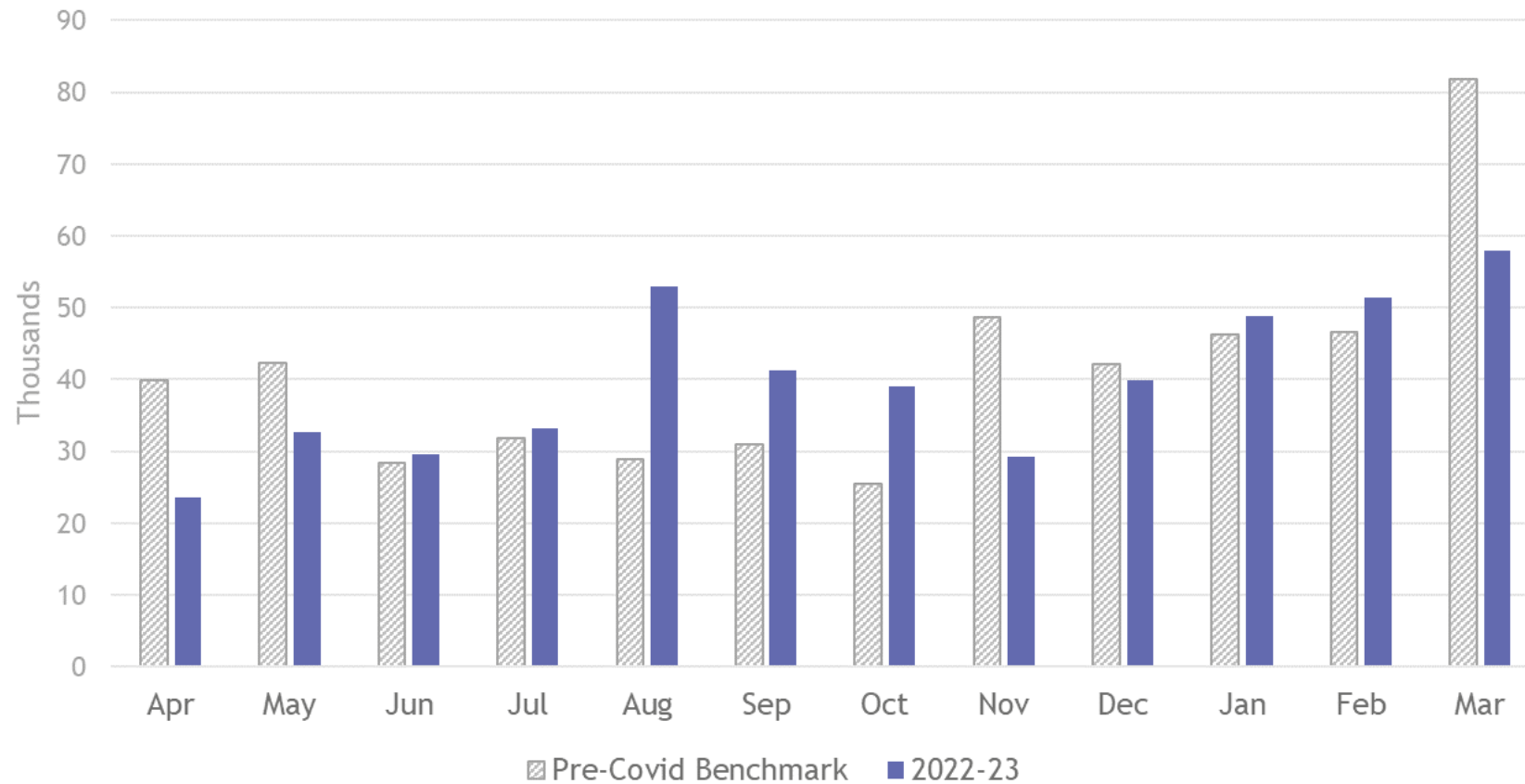


Local orgs - MORE
tickets per perf



Audience Trends

Venues in North East and Highlands & Islands Tickets sales by month



Audience Trends

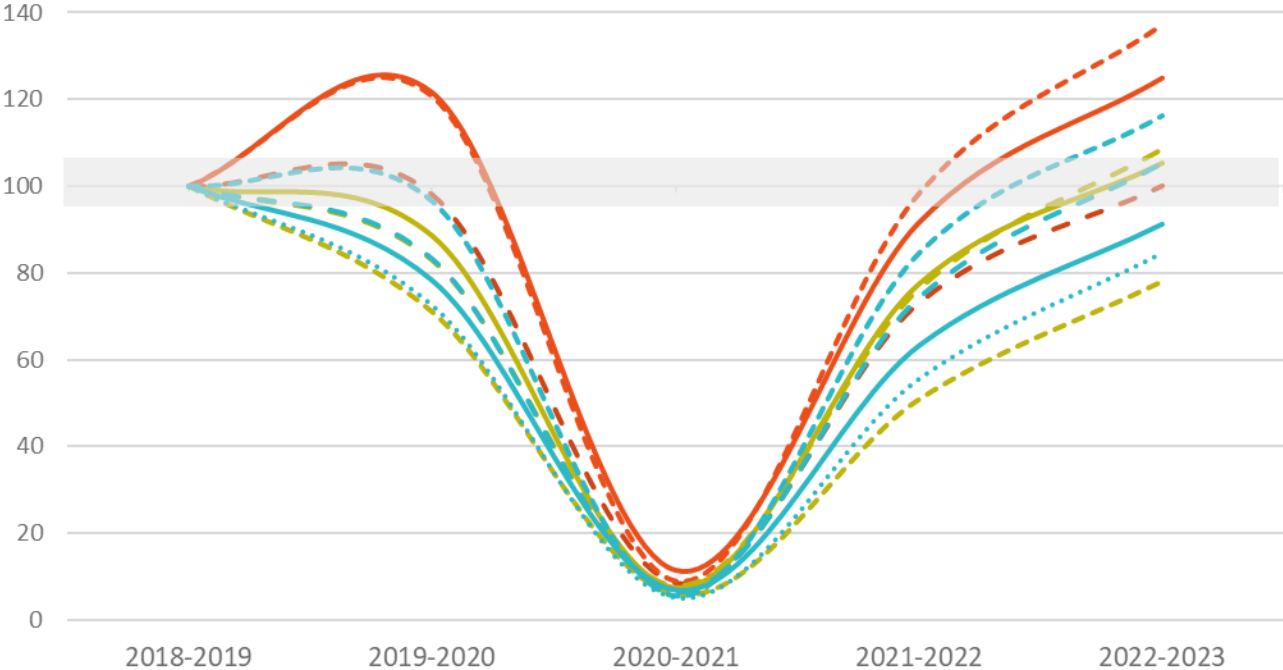
Urban / Higher Engaged



Older / Rural



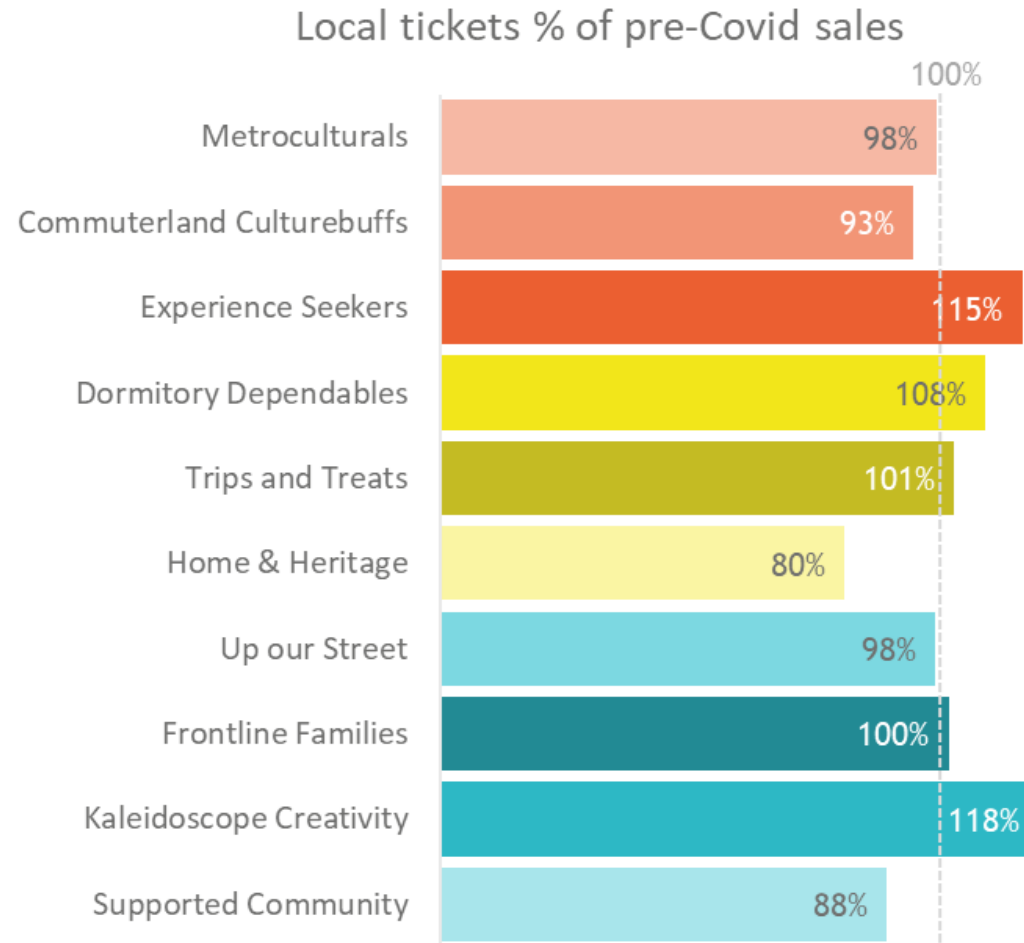
Audience trend - index



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

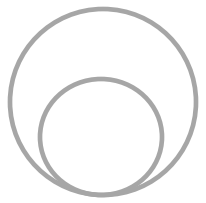
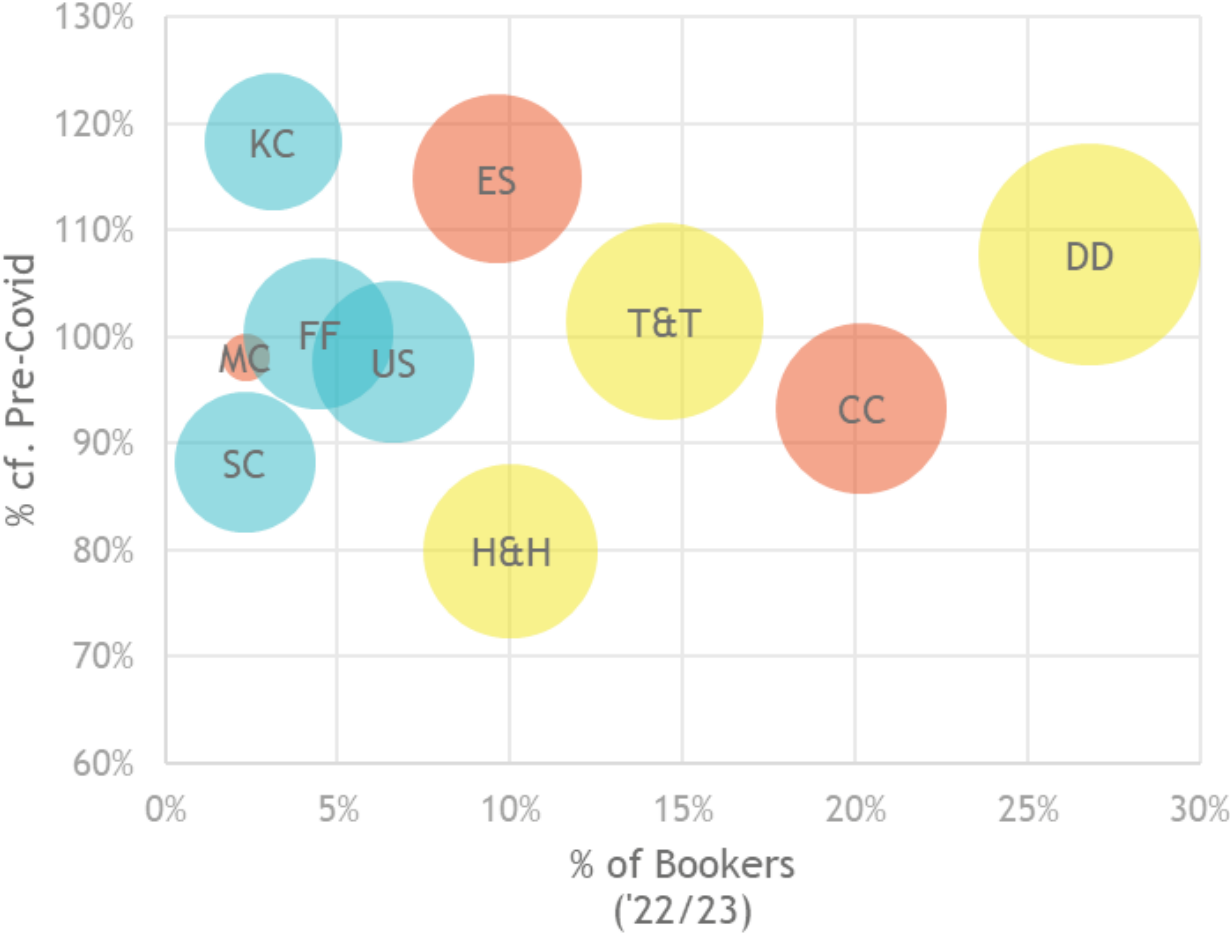
N.B. data is all bookers from the local area

Audience Trends



N.B. data is all bookers
from the local area

Audience Trends

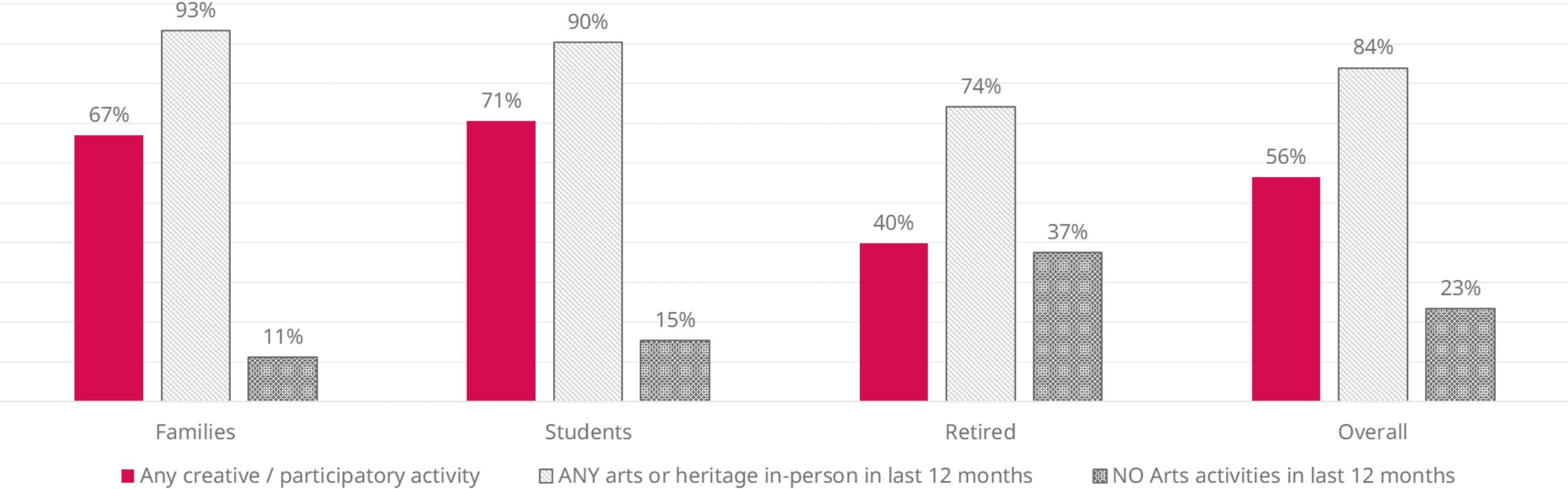


Size is proportional to share of population of NE & H&I

What Else Can We Say About Local Audiences?

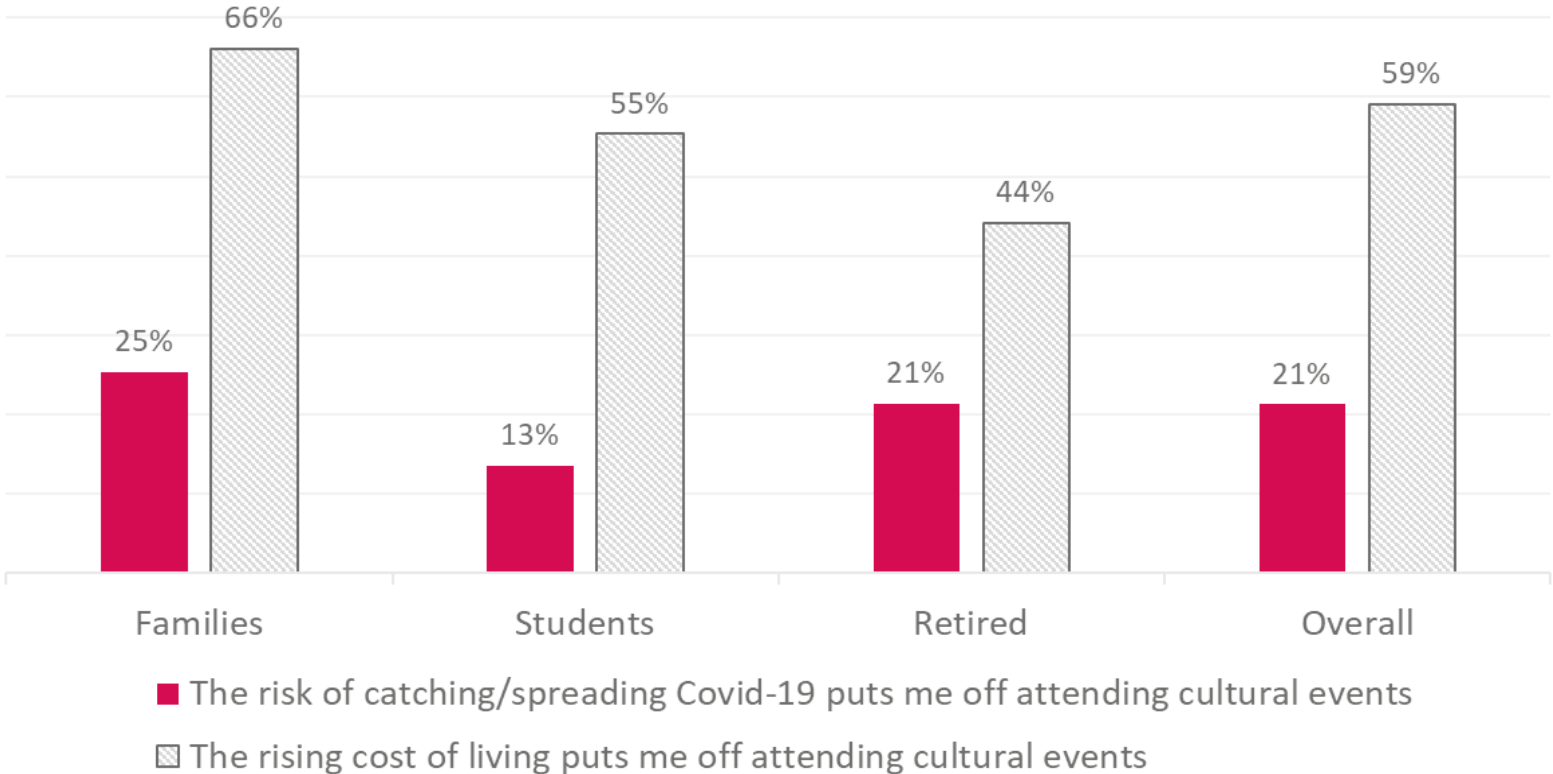
Insights from the Cultural Participation Monitor

Retirees are less likely to attend arts activities in-person compared to Heritage events



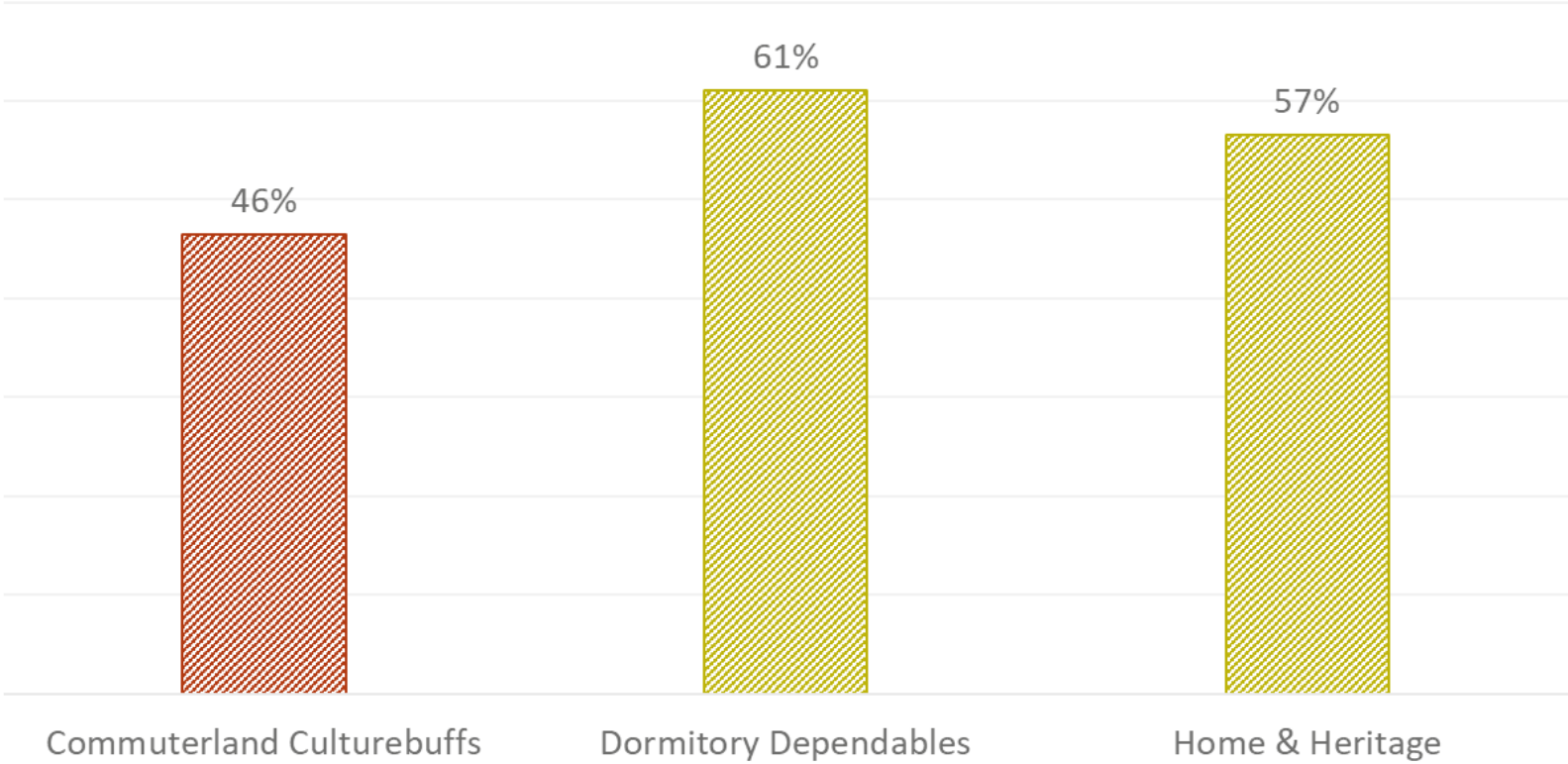
Insights from the Cultural Participation Monitor

Rising cost of living puts all groups off attending cultural events more than the risk of Covid-19



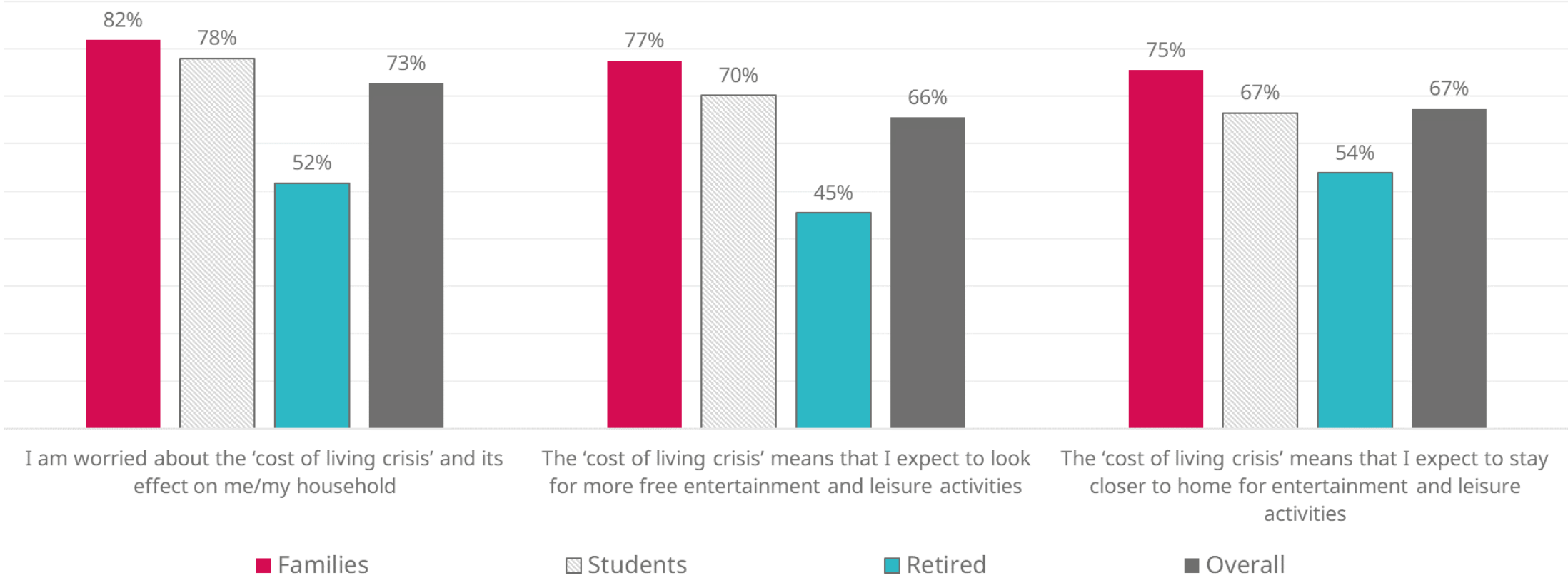
Insights from the Cultural Participation Monitor

The rising cost of living puts me off attending cultural events



Insights from the Cultural Participation Monitor

Retirees are less concerned about the 'cost of living crisis' over the next year



Attitudes re Attending

- **Dormitory Dependables** most likely to disagree that Covid is ‘effectively over’ (29% cf. 24% overall), **Metroculturals**, **Kaledioscope Creativity** and **Experience Seekers** to agree (65%, 60% and 59%, cf. 55% overall). Around 21% overall are put off attending cultural events by Covid.
- 59% are put off by the cost of living: lowest for **Commuterland Culturebuffs** and **Metroculturals** (46%, 49%) Highest for **Frontline Families**, **Supported Communities** and **Experience Seekers** (67%, 67%, 65%).
- Scotland overall is mostly in line with national averages in terms of engagement - but a little more cautious about Covid and a little less concerned about the cost of living.

What Are the Implications?

In Conclusion...?

- Difficult and varied picture (v local, own data vs local area key), but...
- Aberdeen stands out in various ways
- Dormitory Dependable are key re population, bookers and trend
- Otherwise, shift is away from some of current core audiences (CC & H&H)
- Overall recovery is pretty good cf. rest of Scotland, with fewer events and more sales (elsewhere often the opposite) - but has stalled a little...

From Discussion:

- Audience Spectrum groups are stating that the COL is a concern, however, attendance is still the same/sometimes more. Suggesting that the COL crisis is impacting people in differently.
- Time frame differences for UK CPM data and Scotland data, demonstrating a slight shift in the impact of COL for each.
- Local attendance is important at events across Scotland, and a relationship with Audience Spectrum groups and areas of higher attendance establishes this.
- Further insights into travel with regards to events would be useful to better understand attendance.

In Conclusion...?

Immediate:

- Slides shared after the event (/recording via evidence.audienceanswers.org)
- Survey (!)
- Get in touch with any questions: oliver.mantell@theaudienceagency.org

Future:

- Audience Answers networks
- Skillset sessions:
 - Essentials of Evaluation (7/12)
 - Express Marketing Analysis (29/11)
- Audience Spectrum session (Nov - tbc)
- TEA Breaks (13/9 re understanding visual arts audiences & monthly)

See theaudienceagency.org/events for more

Thank you

Please get in touch: theaudienceagency.org
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 the audience agency