

# Tyne & Wear

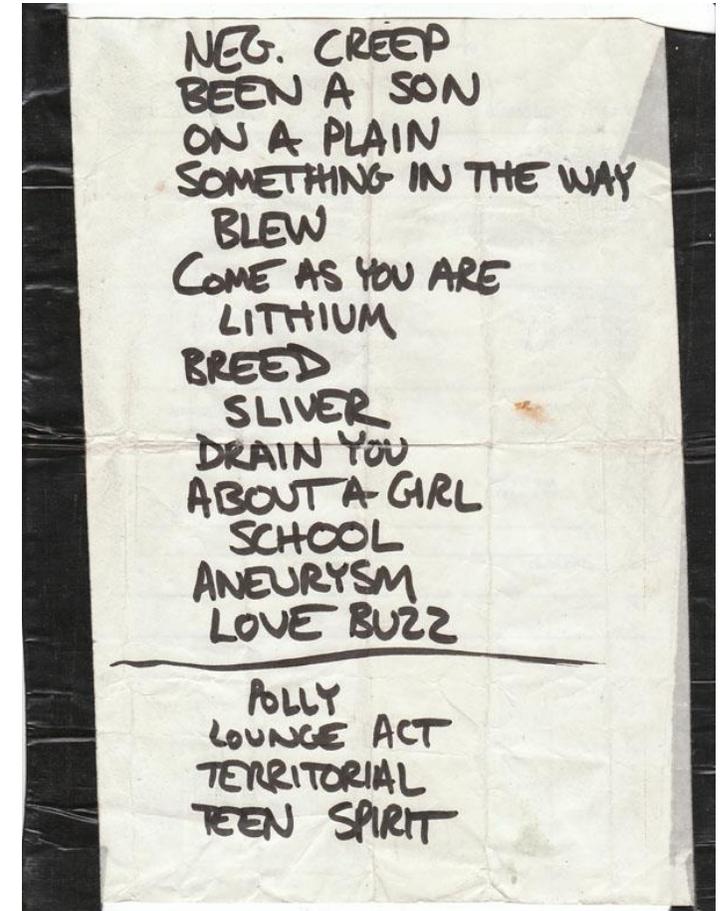
## Place Based Insights

Oliver Mantell, Director of Evidence & Insight

Elise Boileau, Evidence & Insight Researcher

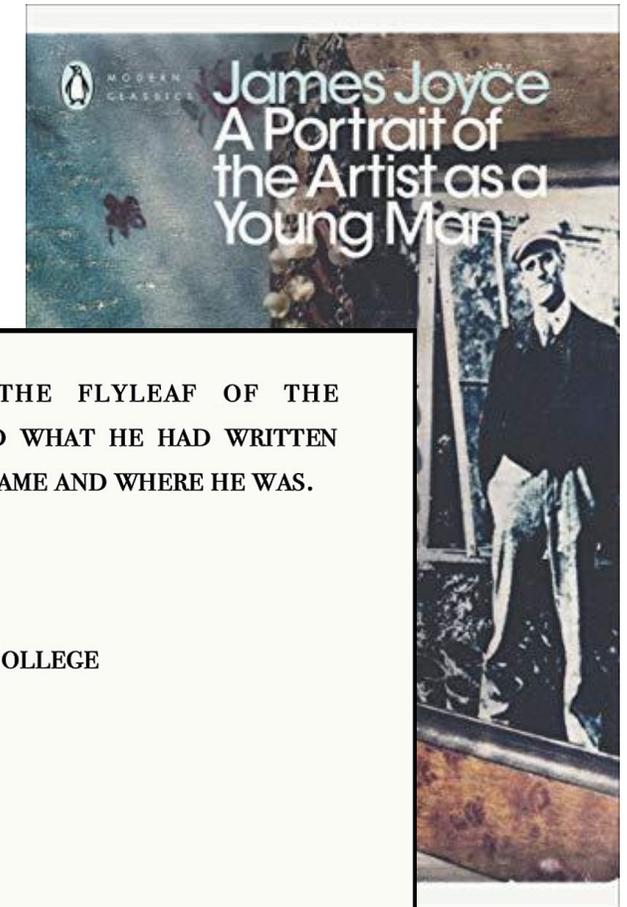
## Format of the session

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



# Types and Levels of Information

- **Nation:** Cultural Participation Monitor
- **Region:** Cultural Participation Monitor; Audience Spectrum
- **Subregion:** Audience Finder (ticketing and surveys); Audience Spectrum; Census; TGI
- **Local Authority:** Audience Finder (ticketing and surveys); Audience Spectrum; Census; TGI
- **Ward:** Audience Finder Ticketing; Area Profile Report+; Audience Spectrum

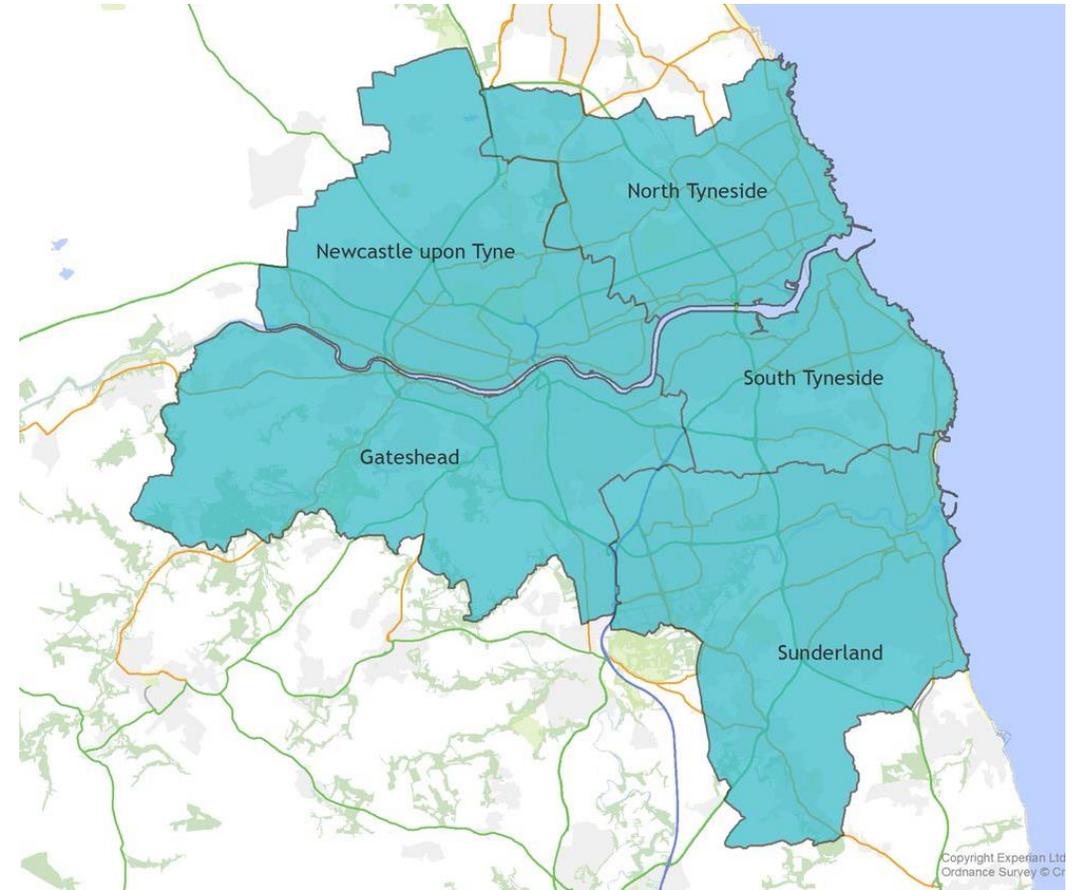


“HE TURNED TO THE FLYLEAF OF THE GEOGRAPHY AND READ WHAT HE HAD WRITTEN THERE: HIMSELF, HIS NAME AND WHERE HE WAS.

STEPHEN DEDALUS  
CLASS OF ELEMENTS  
CLONGOWES WOOD COLLEGE  
SALLINS  
COUNTY KILDARE  
IRELAND  
EUROPE  
THE WORLD  
THE UNIVERSE”

# Types and Levels of Information

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 audience  
spectrum

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



# Data Sources

5 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



# Example: Experience-Seekers Pen Portrait

## Download

Experience Seekers statistical appendix

Engagement rank: 3

Population: 8% of English households

Arts attenders: tbc

Rating: Higher



## Highly active, diverse, social and ambitious, engaging with arts on a regular basis

- Make up an important and significant part of urban arts audiences
- This group are highly active, diverse, social and ambitious singles and couples, regularly engaging with the arts on a regular basis
- Often students, recent graduates and in the early to mid-stages of their careers
- Tend to live close to city centres, so have easy access to and attend art galleries and heritage
- Interests cover mainstream, contemporary and culturally diverse activities, and are active in their social lives
- They are mostly in search of new things to do and have disposable income for leisure activities like sports/arts memberships, visits to cafes, bars and restaurants
- Typically digitally savvy, they will share experiences through social media

### - Overview

#### Lifestage & location

A high proportion are singles and couples in their 20s and 30s across the country but 56% focused in the South.

#### Opportunity

Seeking new experiences to support and drive their lifestyle. They are interested in mainstream and alternative offers. Mostly digital and like to 'share' and follow recommendations. They are likely to be influencers and are likely to form key influencers amongst their social circles.

#### + Interests

#### + Location

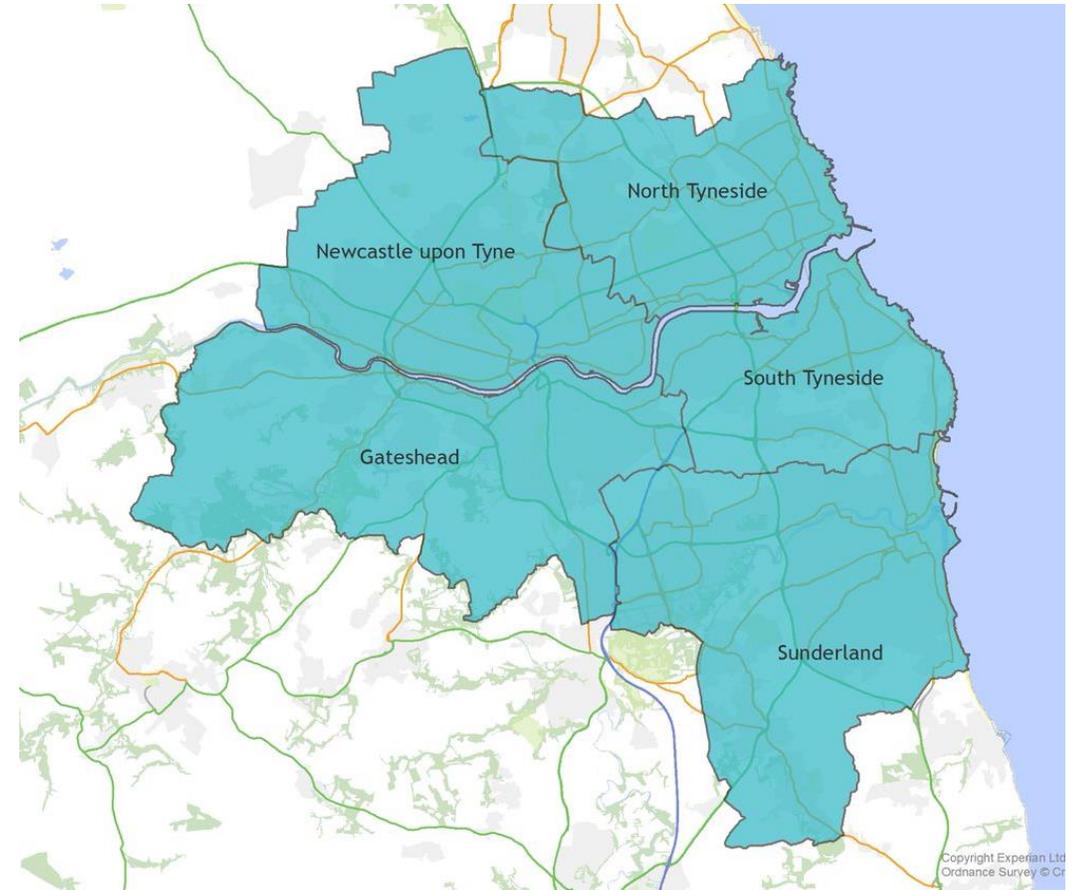
#### + Preferences

#### + How to engage

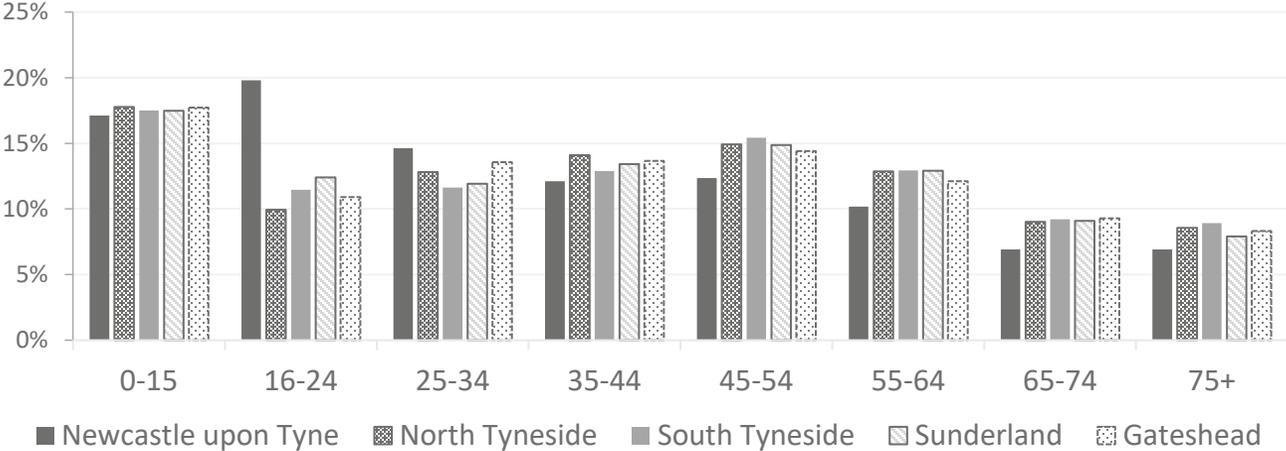
# Local Population

# Local Area and Population

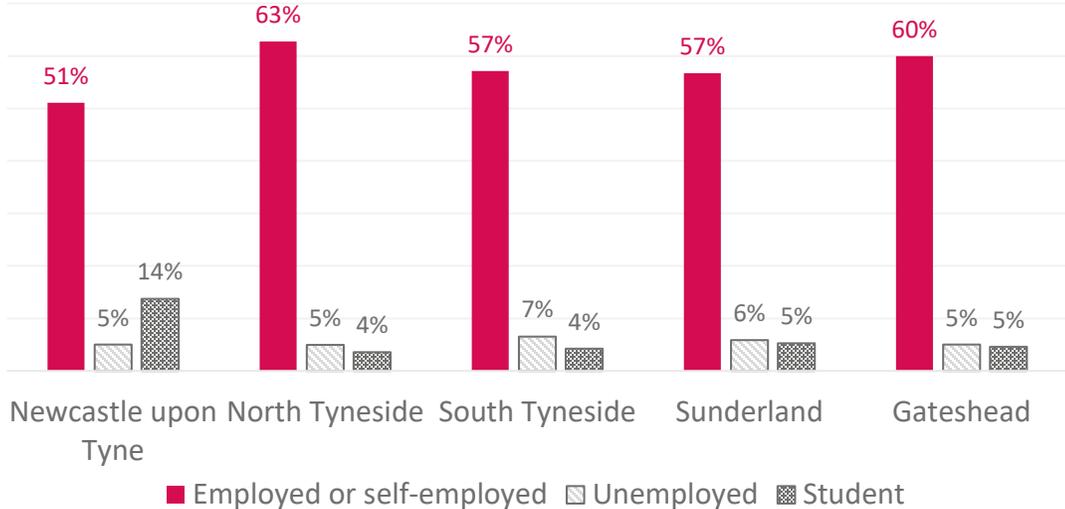
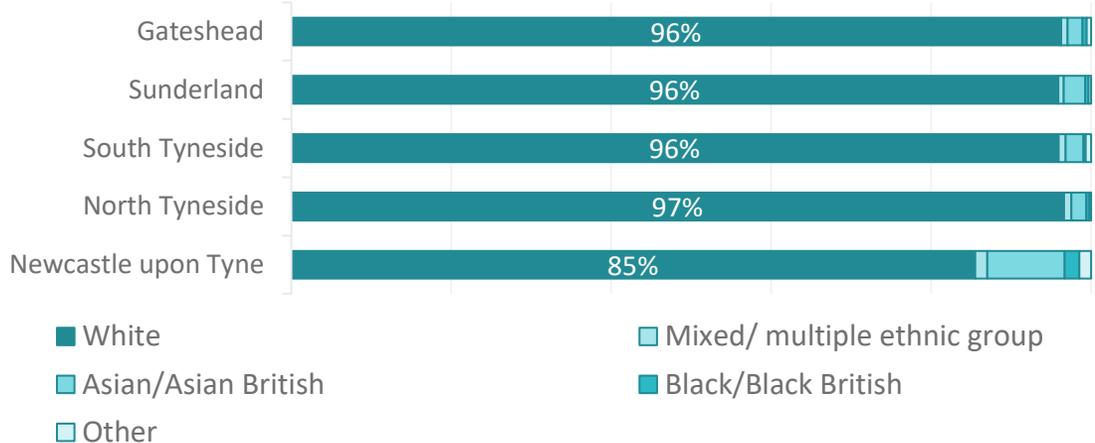
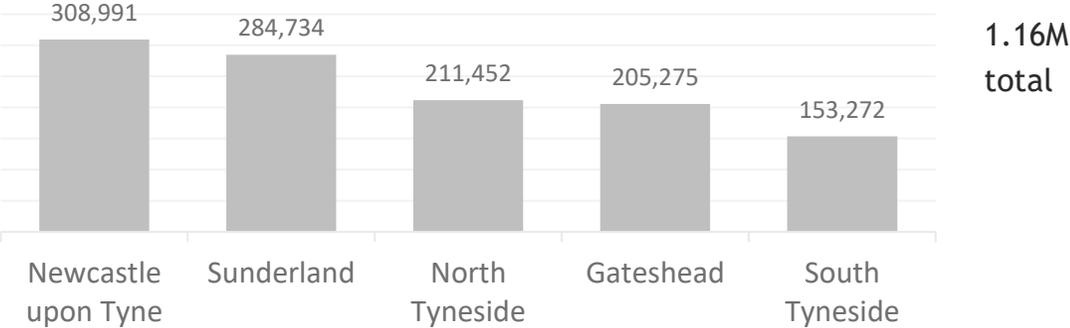
- Overview of demographics
- Audience Spectrum profile:
  - Overall
  - By LA
- Mapping:
  - Largest segment overall/bookers
  - Each of the four largest segments



# Population data – comparing the towns/cities

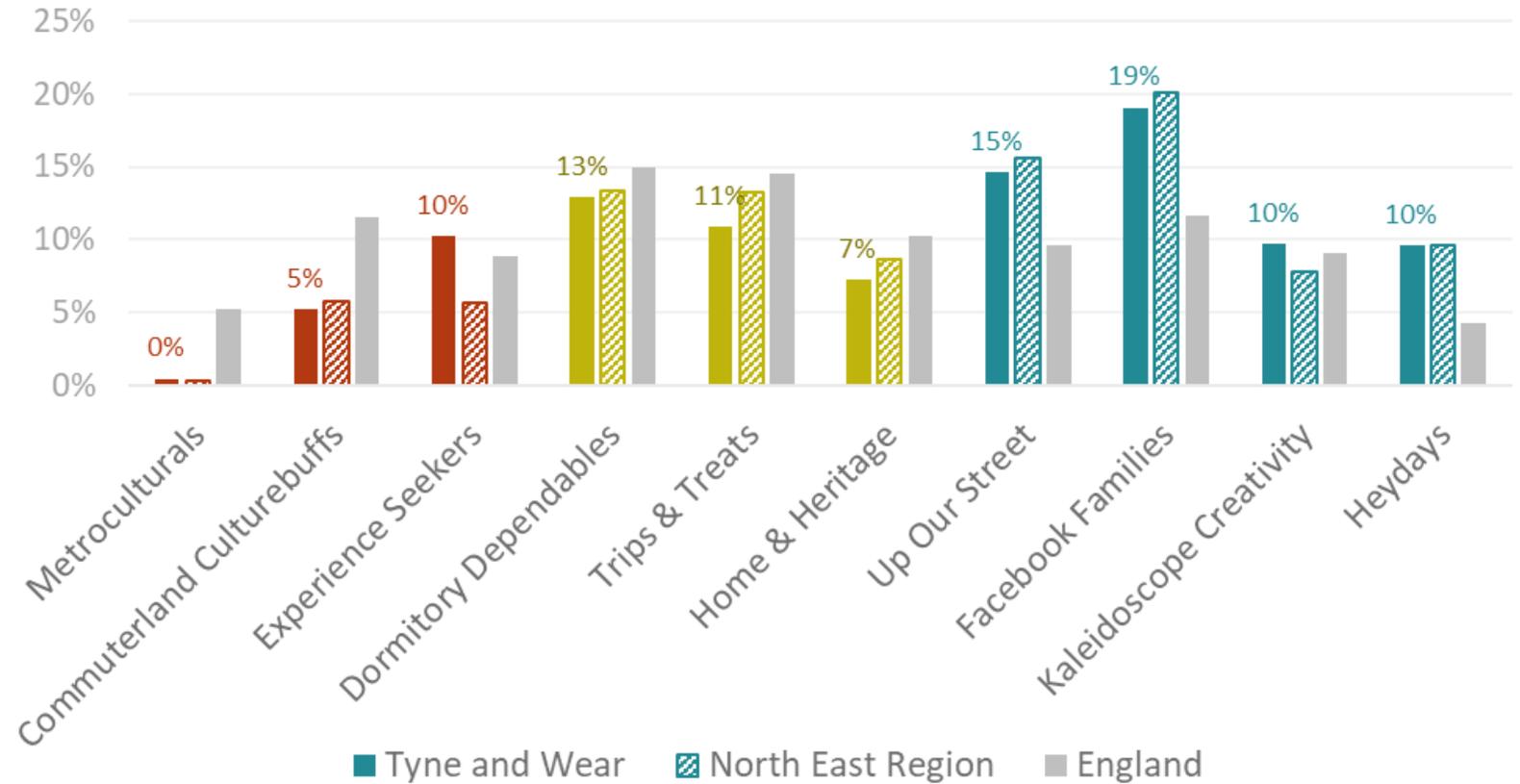


Population estimate 2020



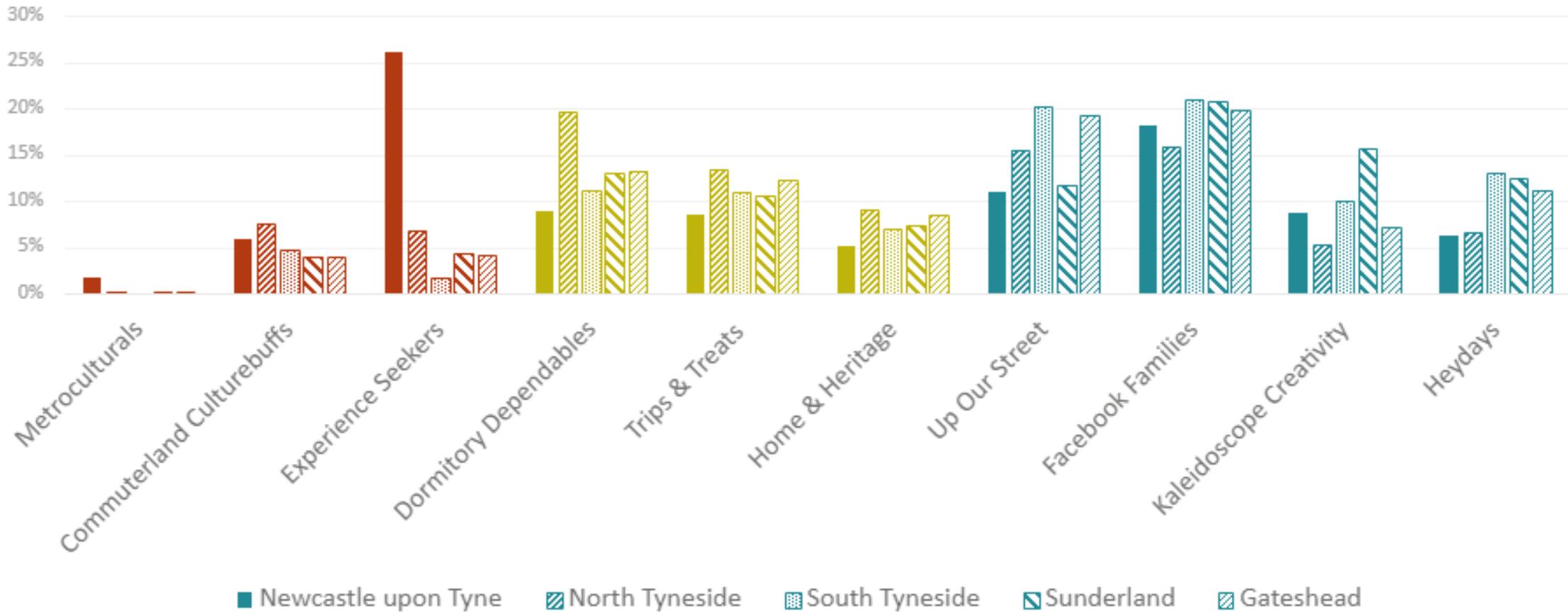
# Overall Population Audience Spectrum Profile

High Concentrations of Groups with More Families

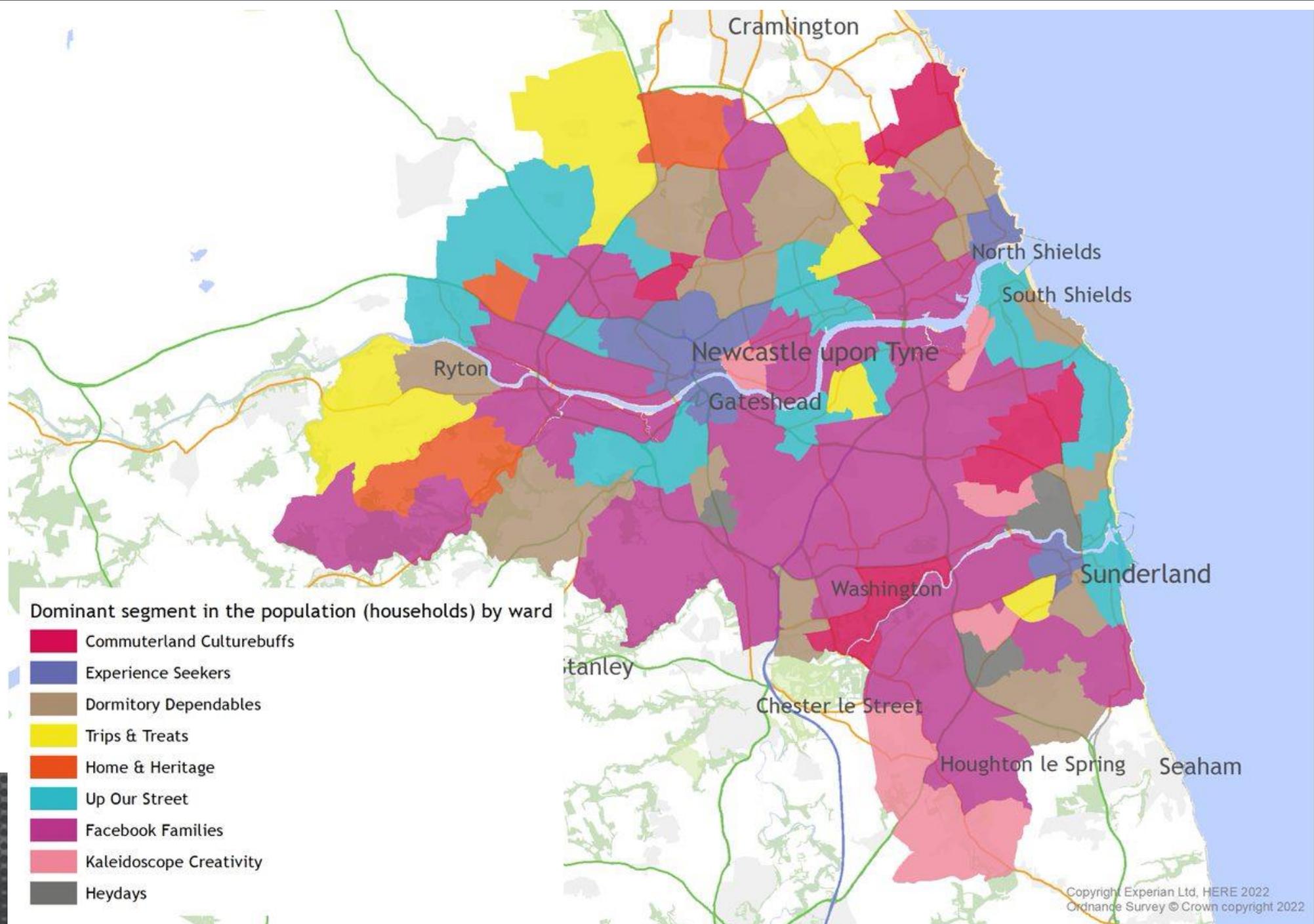


# Population data – comparing the Cities/LAs

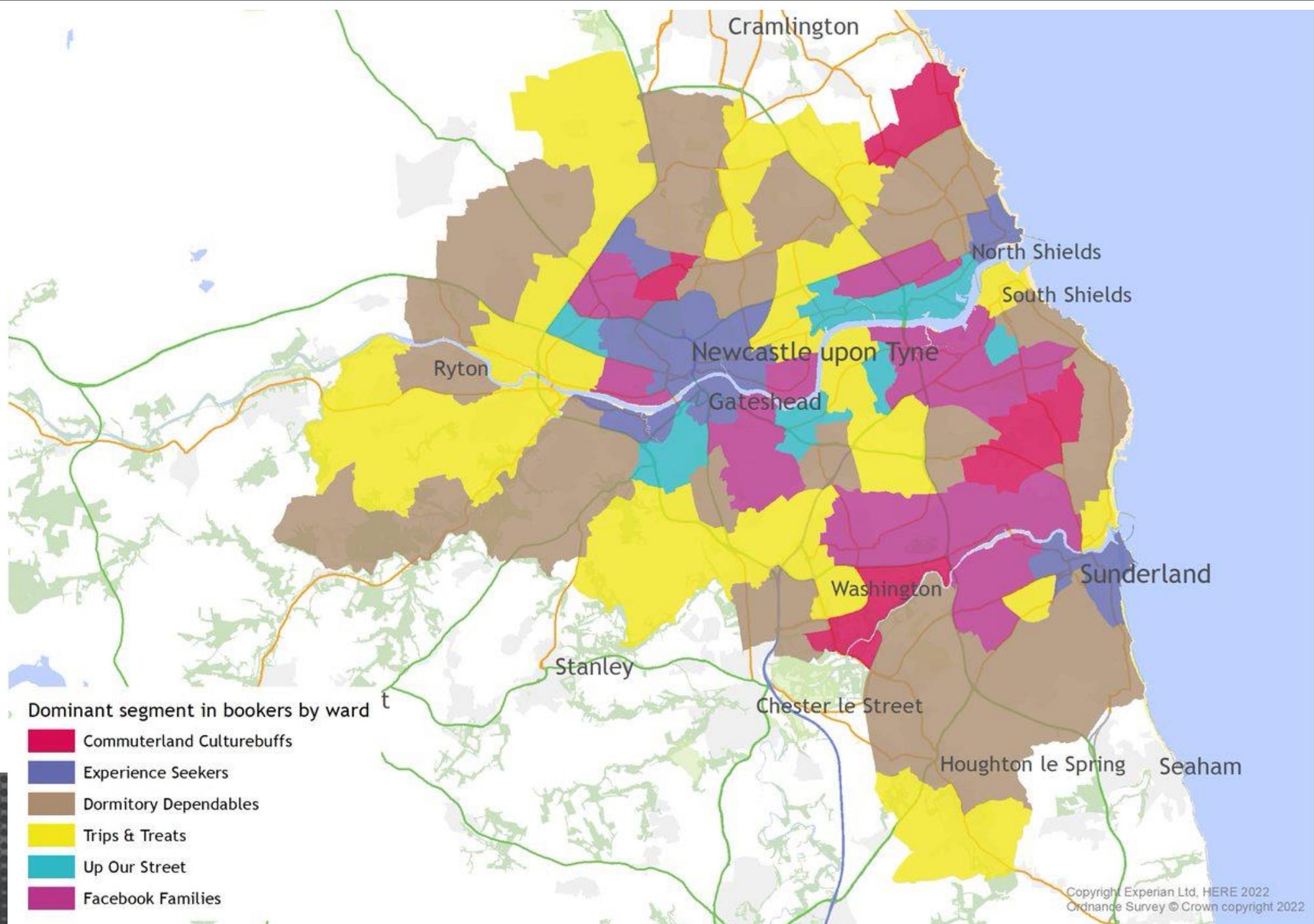
Newcastle has the most Experience Seekers, Sunderland the most Kaleidoscope Creativity



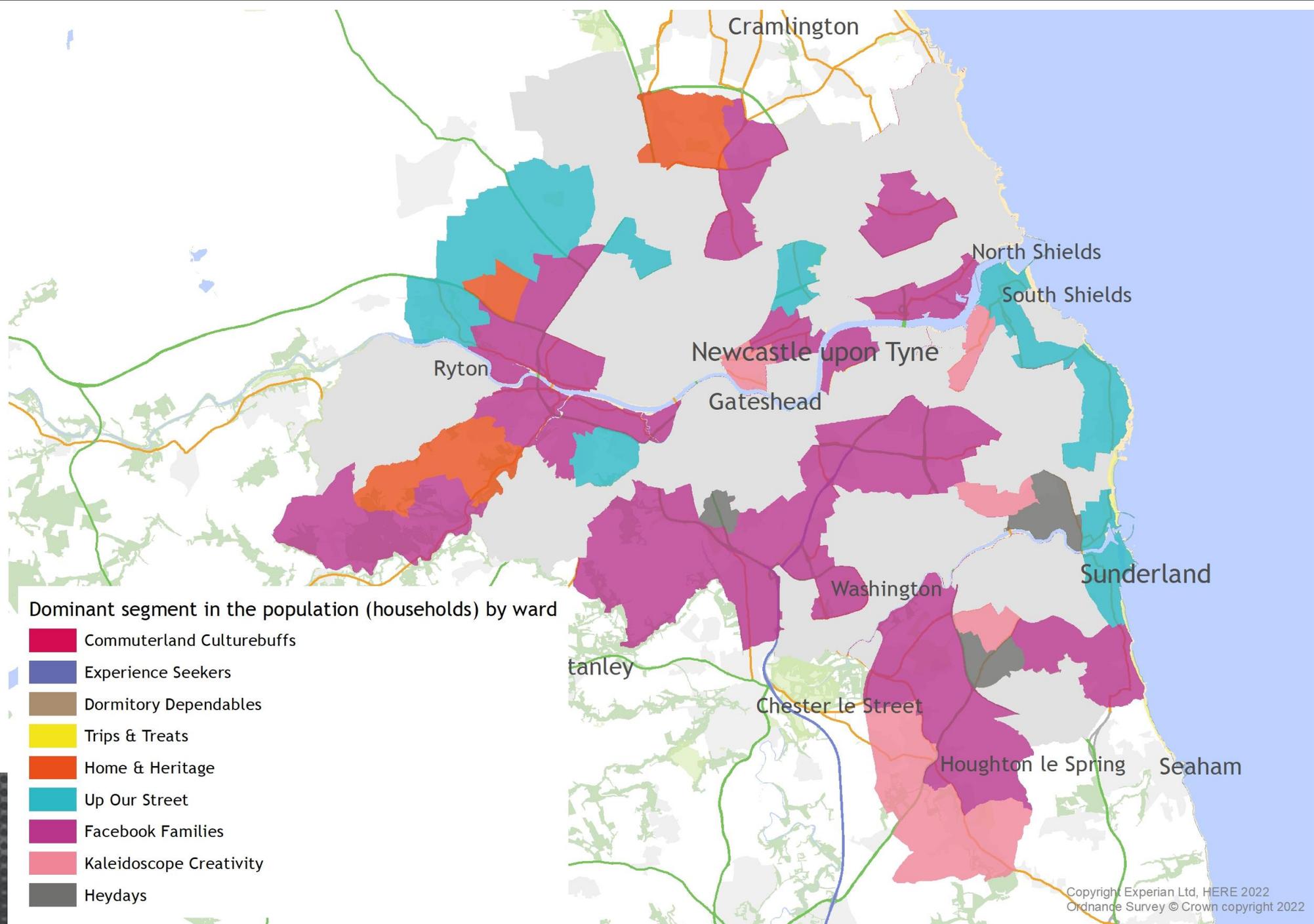
# Dominant Audience Spectrum Segment by Ward: Population



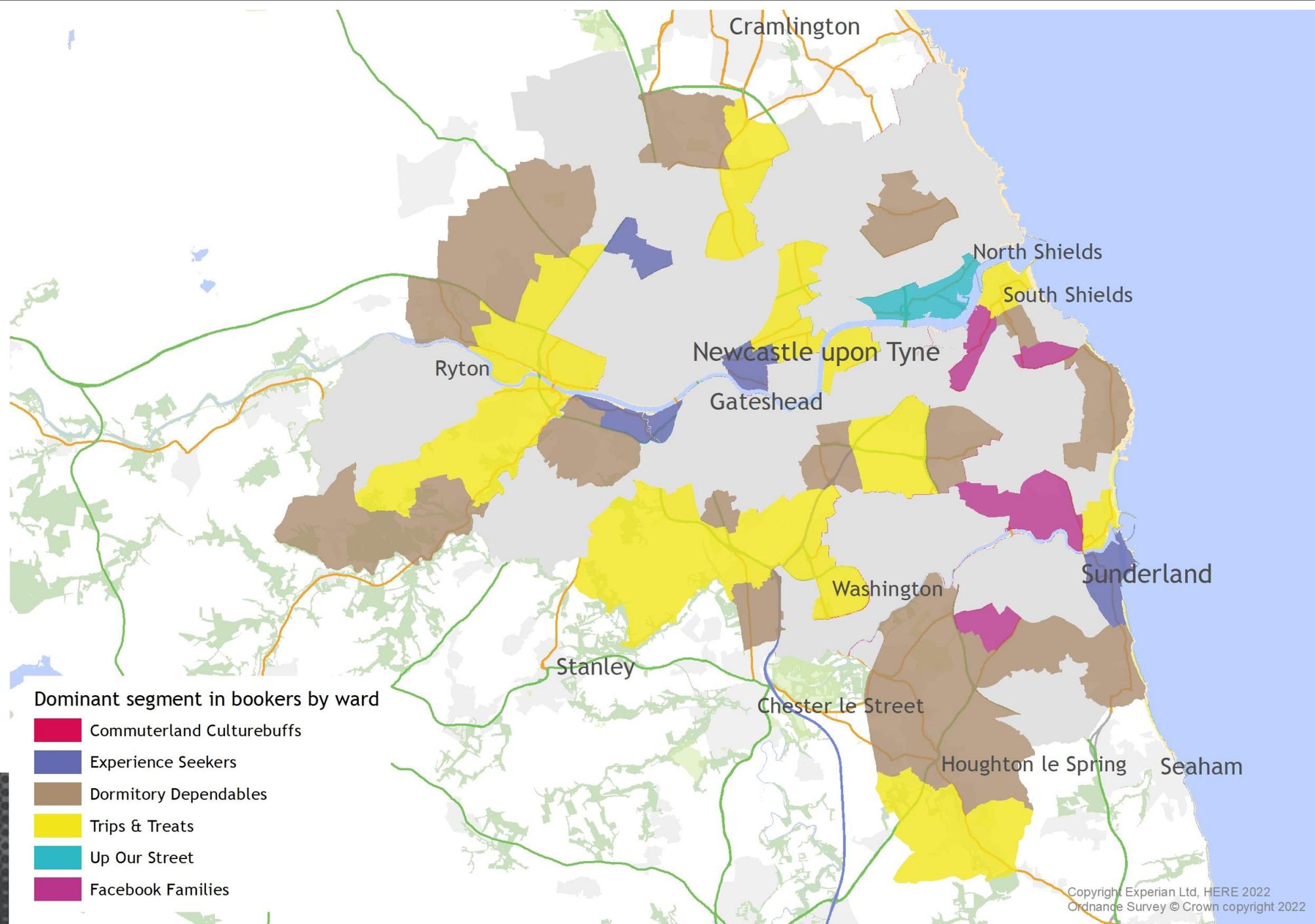
# Dominant Audience Spectrum Segment by Ward: Bookers



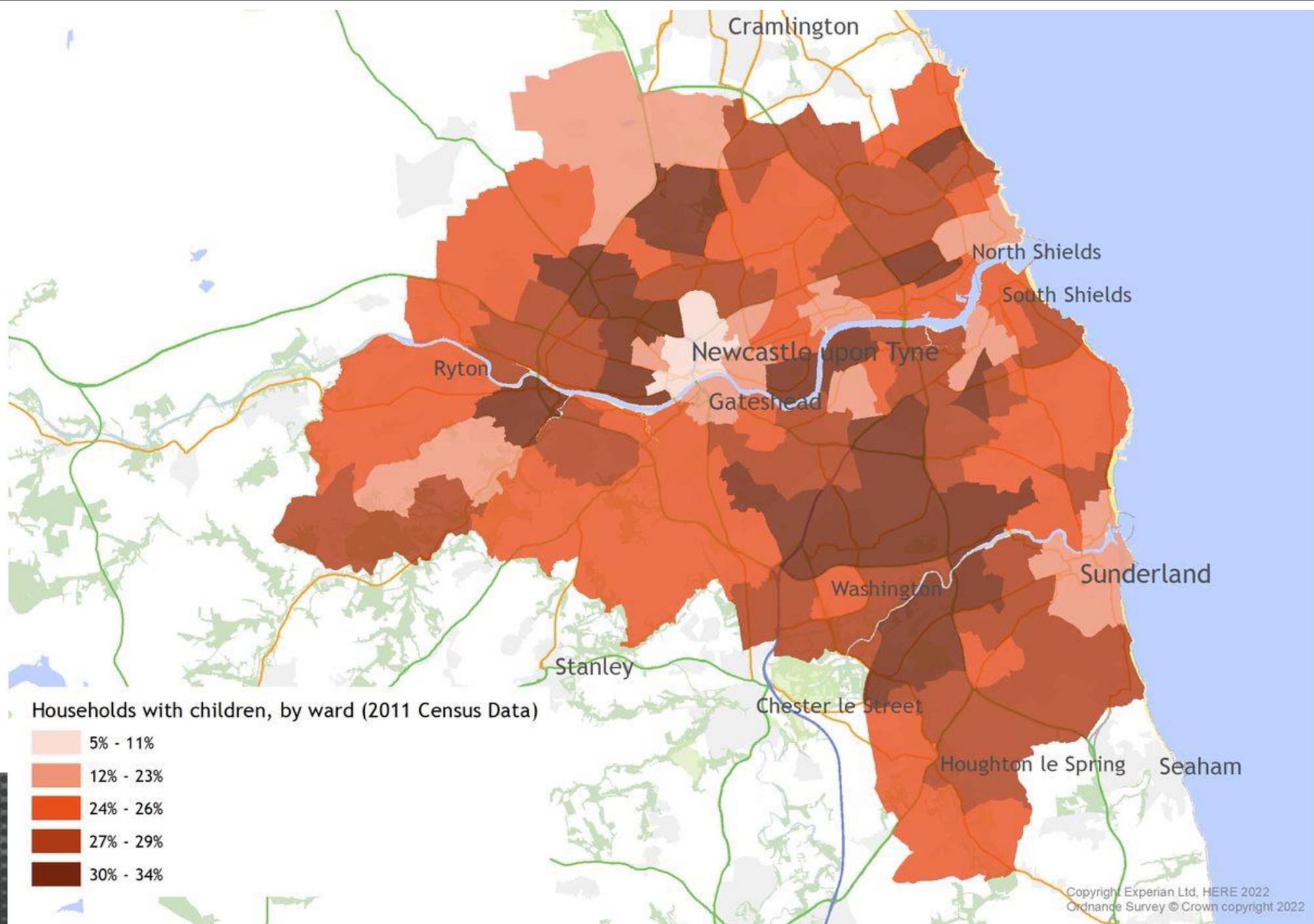
# Dominant Audience Spectrum Segment by Ward: Population



# Dominant Audience Spectrum Segment by Ward: Bookers



# Dominant Audience Spectrum Segment by Ward



# Local Audiences

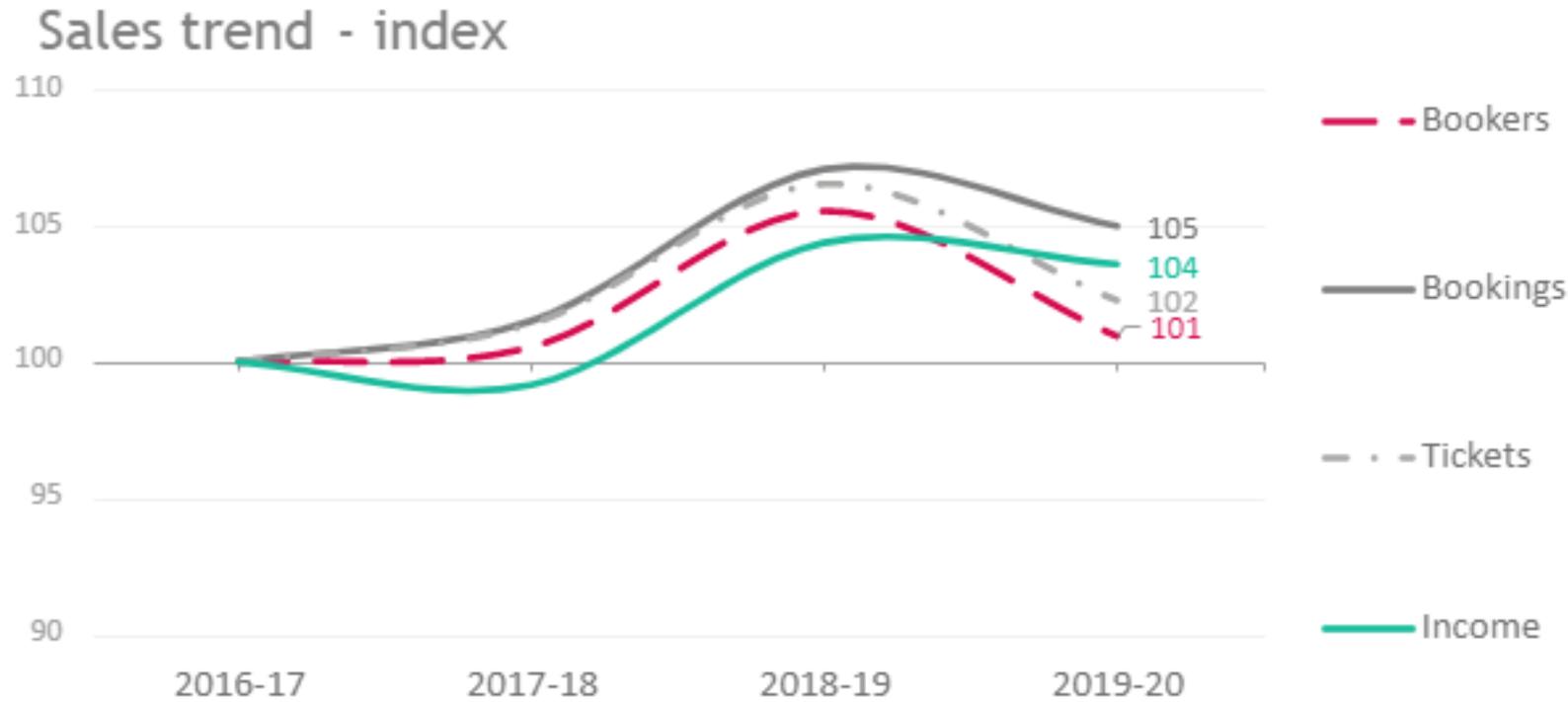
## Sales and Profile

# About Local Audiences

Audience Finder ticketing:

	16/17	19/20	Increase
Bookers	91k	92k	0.8k
Bookings	238k	250k	12k
Tickets	562k	575k	13k
Income	£12.3M	£12.7M	£0.4M

# Sales Trends



Based on T&W residents across a consistent cohort of Audience Finder venues.

2019/20:

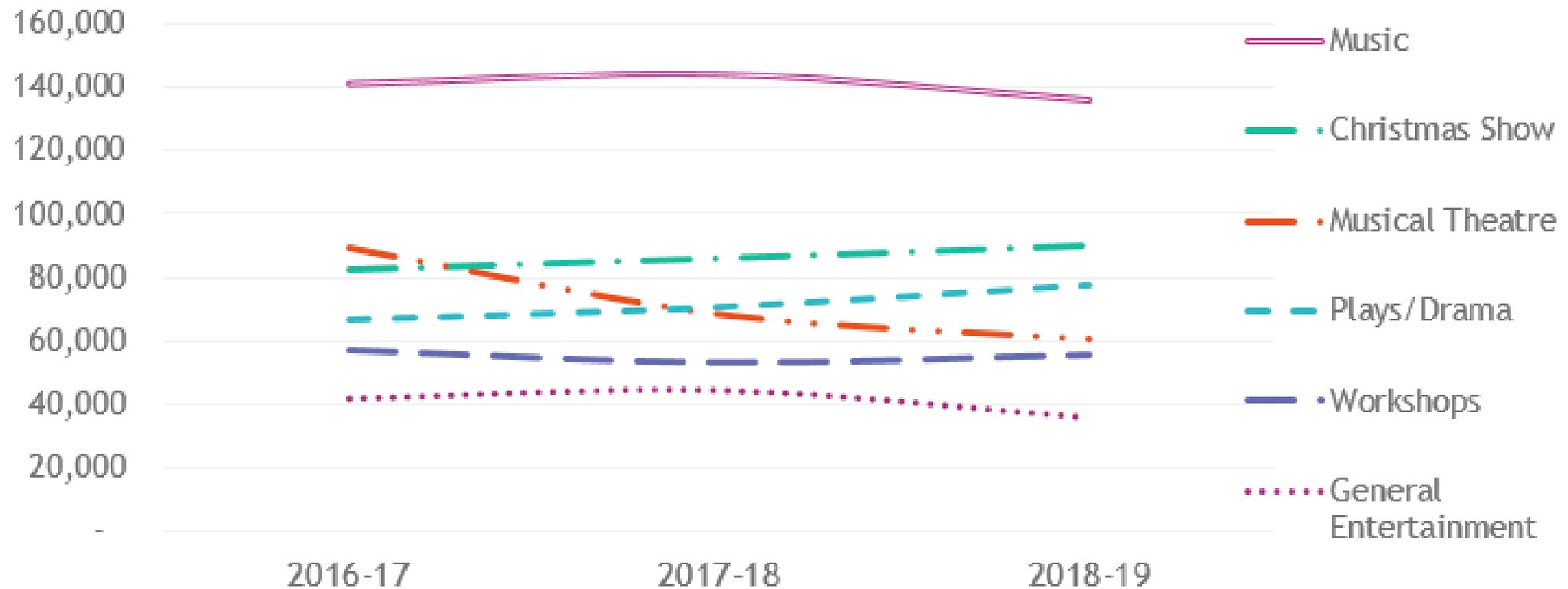
Avg. income/ticket: £22.58, +3%

Avg. bookings/booker: 2.7, +4%

Avg. tickets/booking: 2.3, -3%

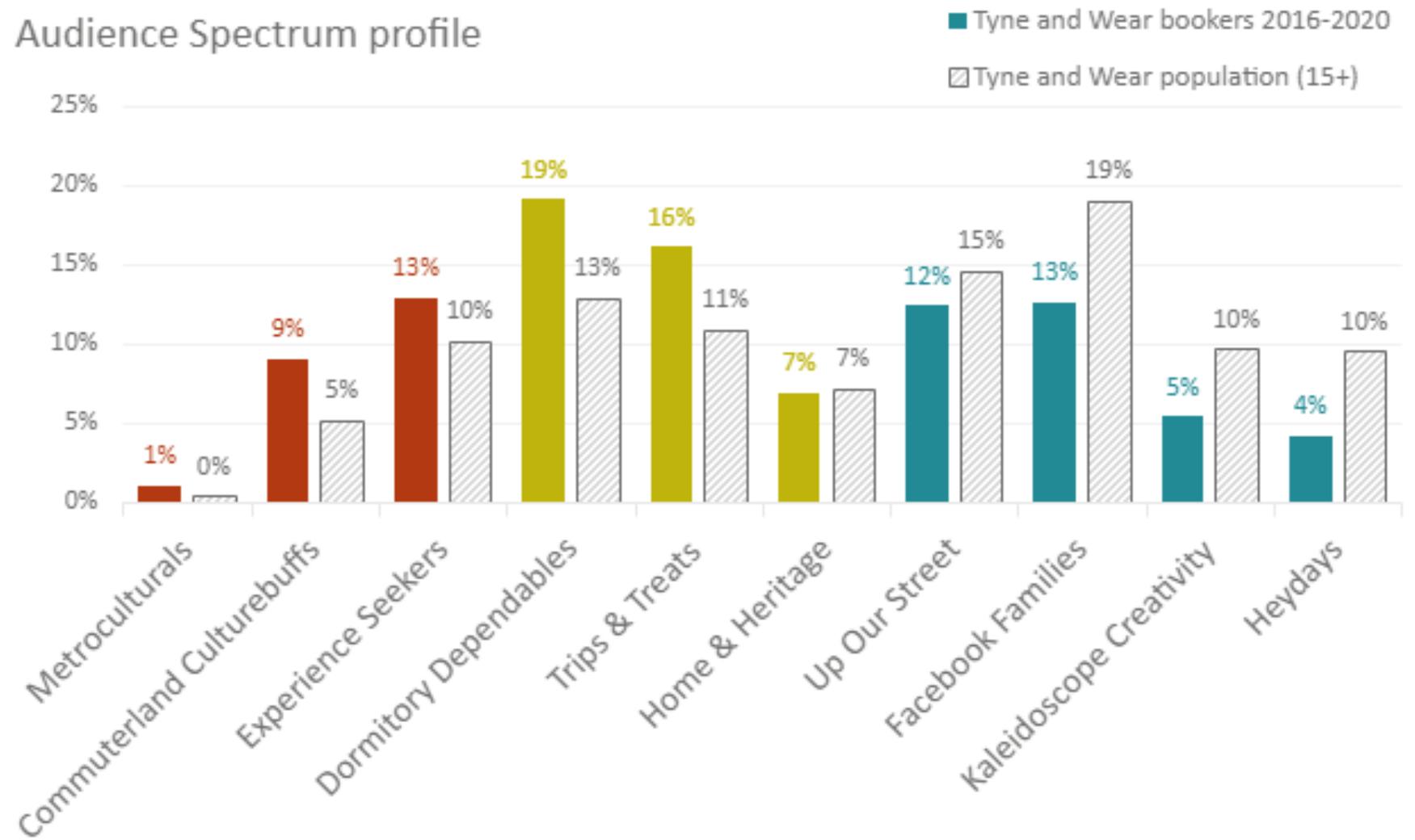
# Audience Trends

Ticket sales by year for six most popular artforms



# About Local Audiences

Audience Spectrum profile



# Audience Trends

Family

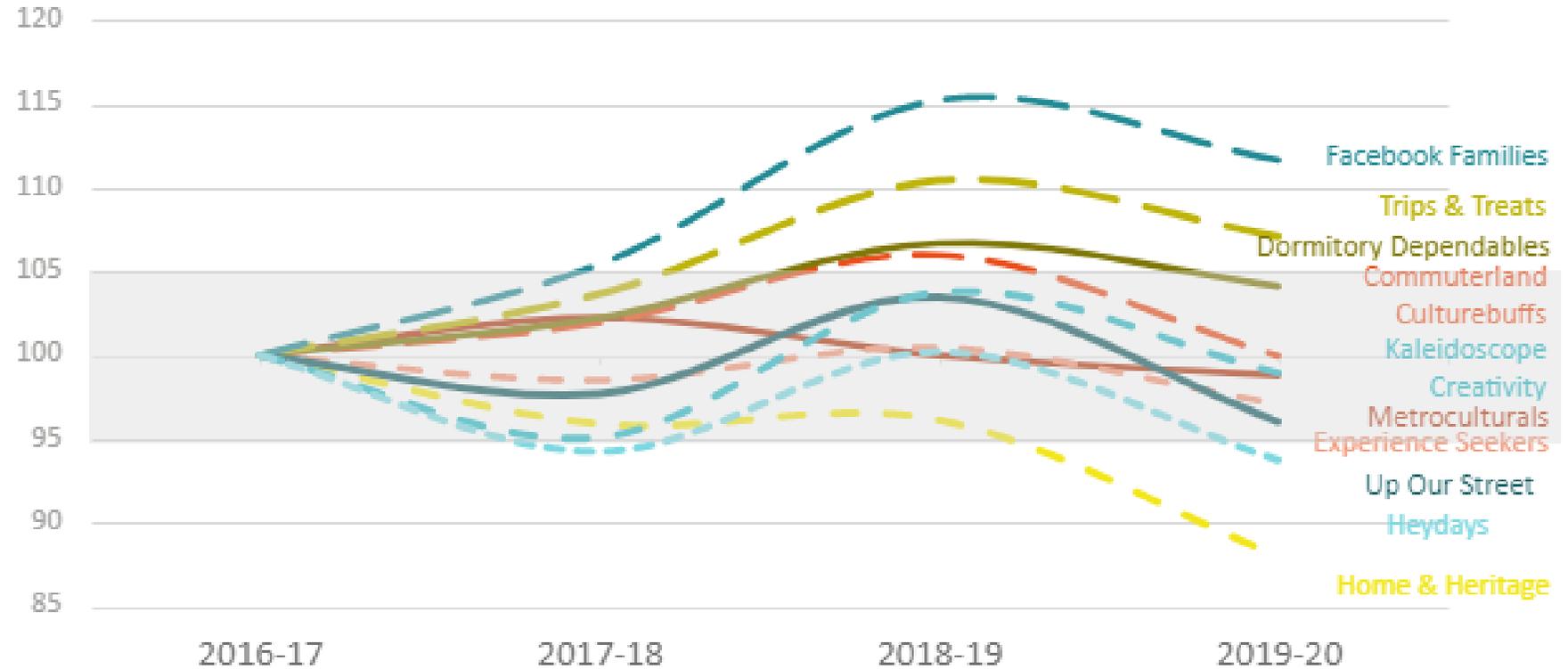


Older

(/Higher-engaged?)



Audience trend - index



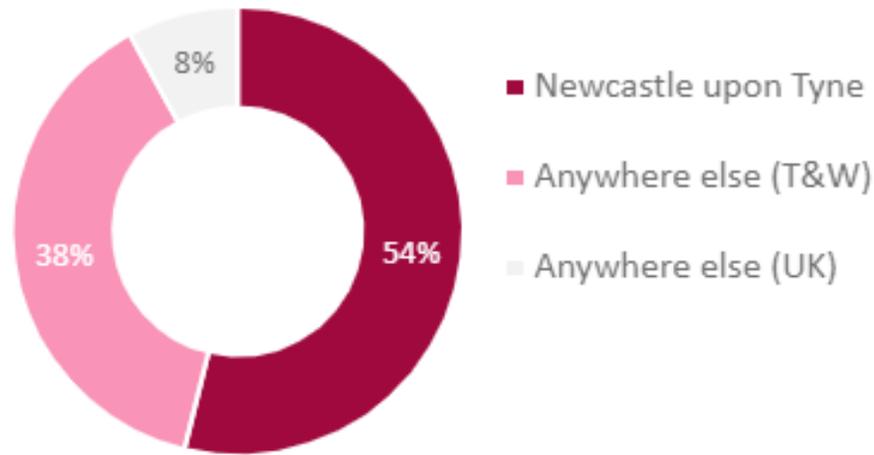
# Local Audiences

## Geography

# Non-Local Audiences

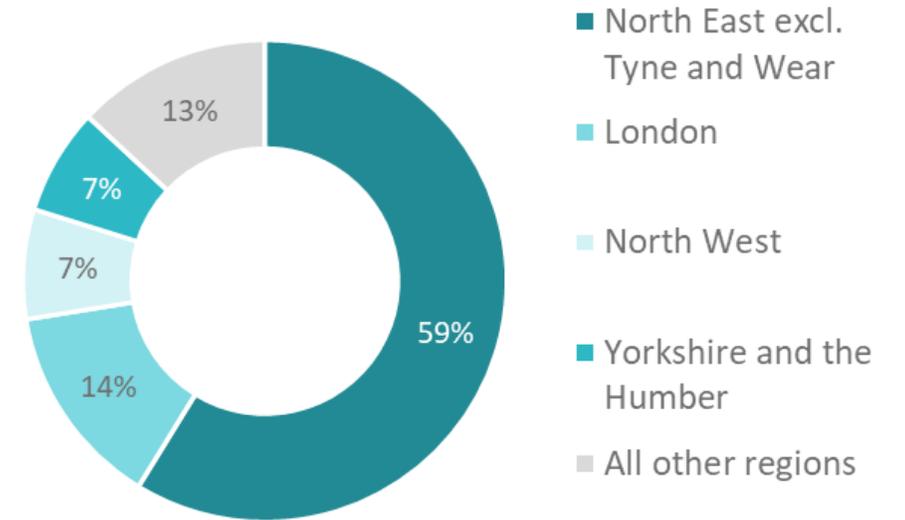
92% of all tickets were to organisations in Tyne and Wear, half of tickets were to Newcastle alone

Tickets issued to T&W residents, in years 2016-17 to 2019-20



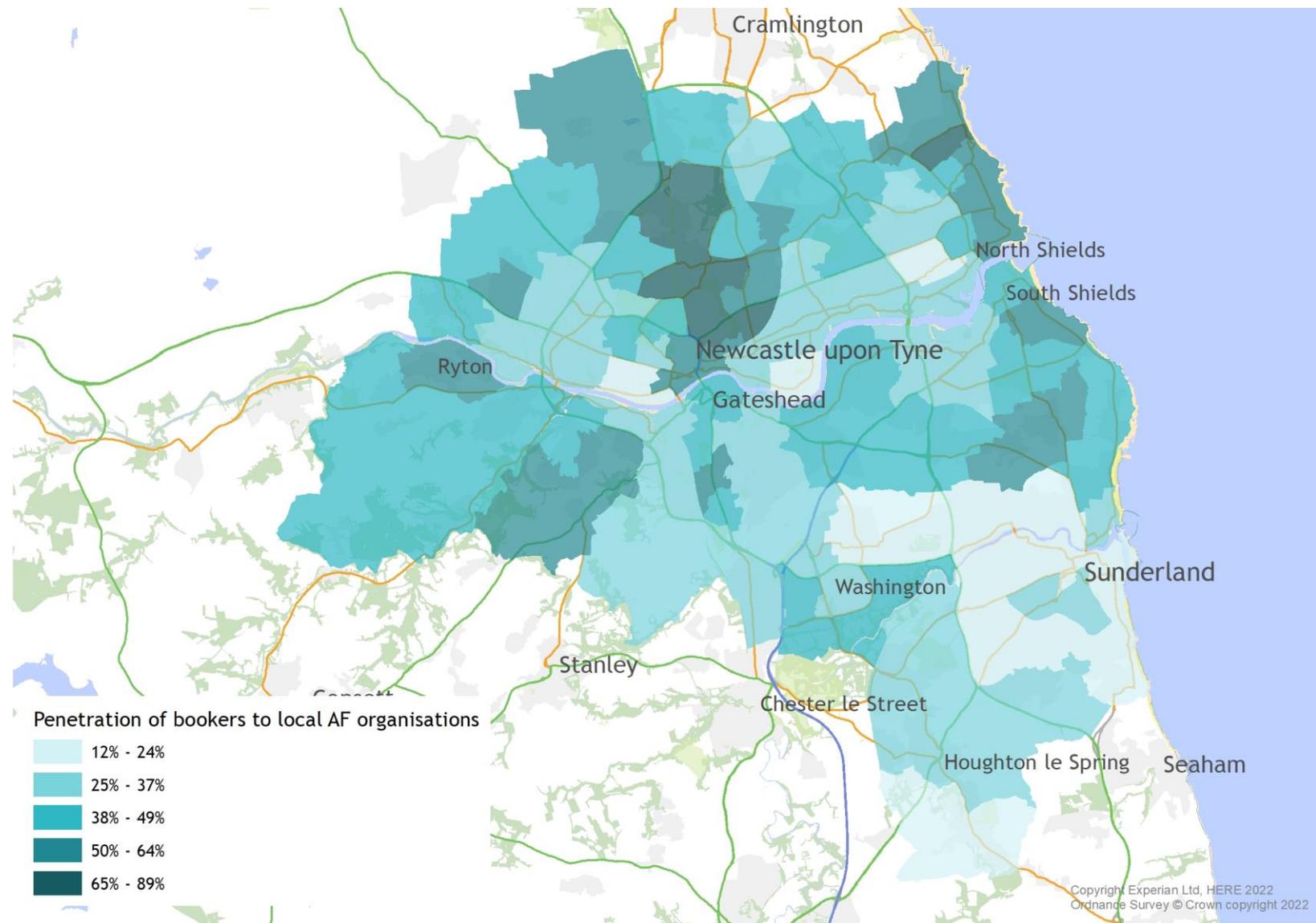
3 out of five tickets issued elsewhere were in the rest of the North East

Tickets issued to T&W residents by organisation outside of T&W, in years 2016-17 to 2019-20

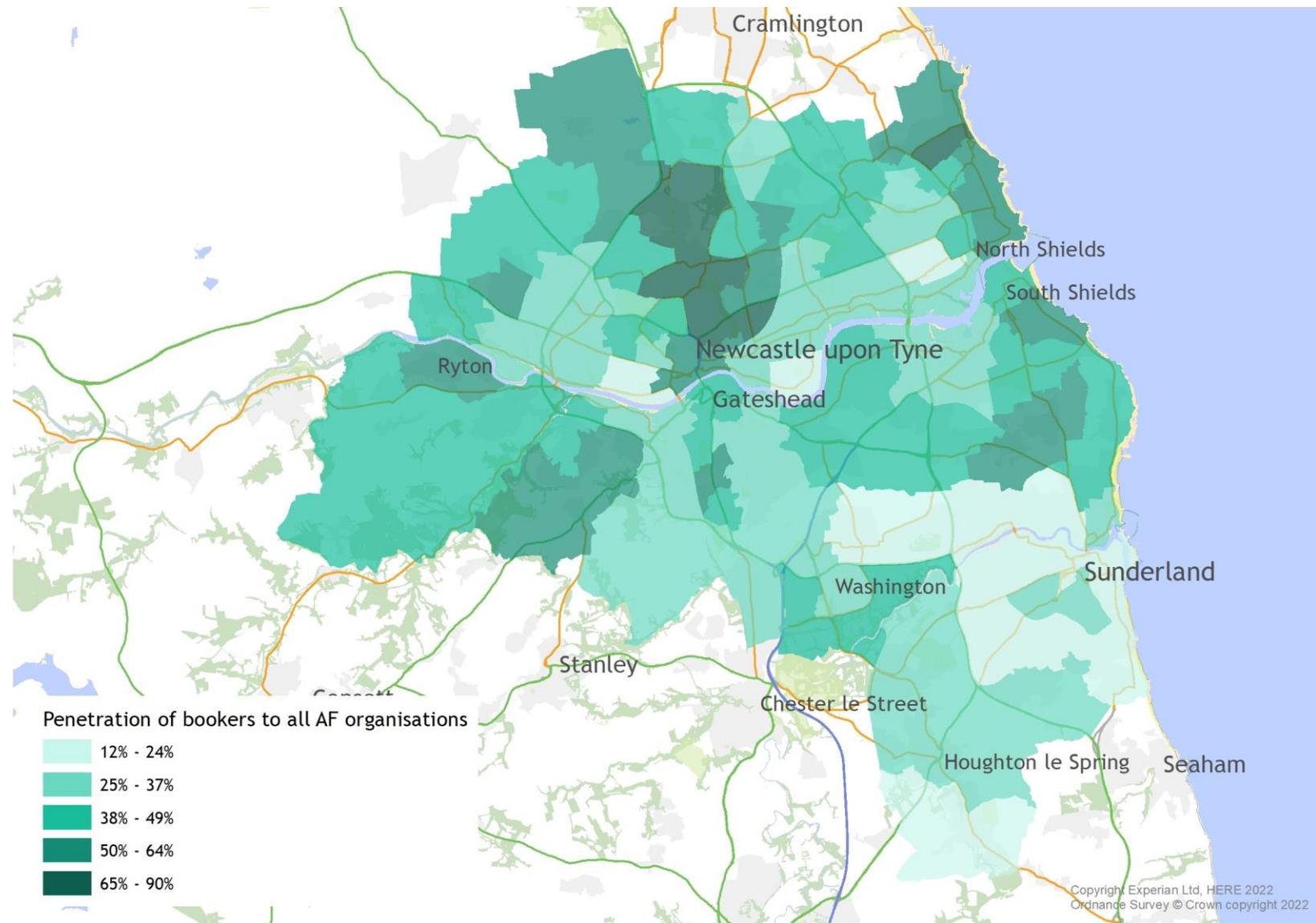


Audience Finder Surveys: 44% of survey respondents from T&W were visiting organisations in T&W

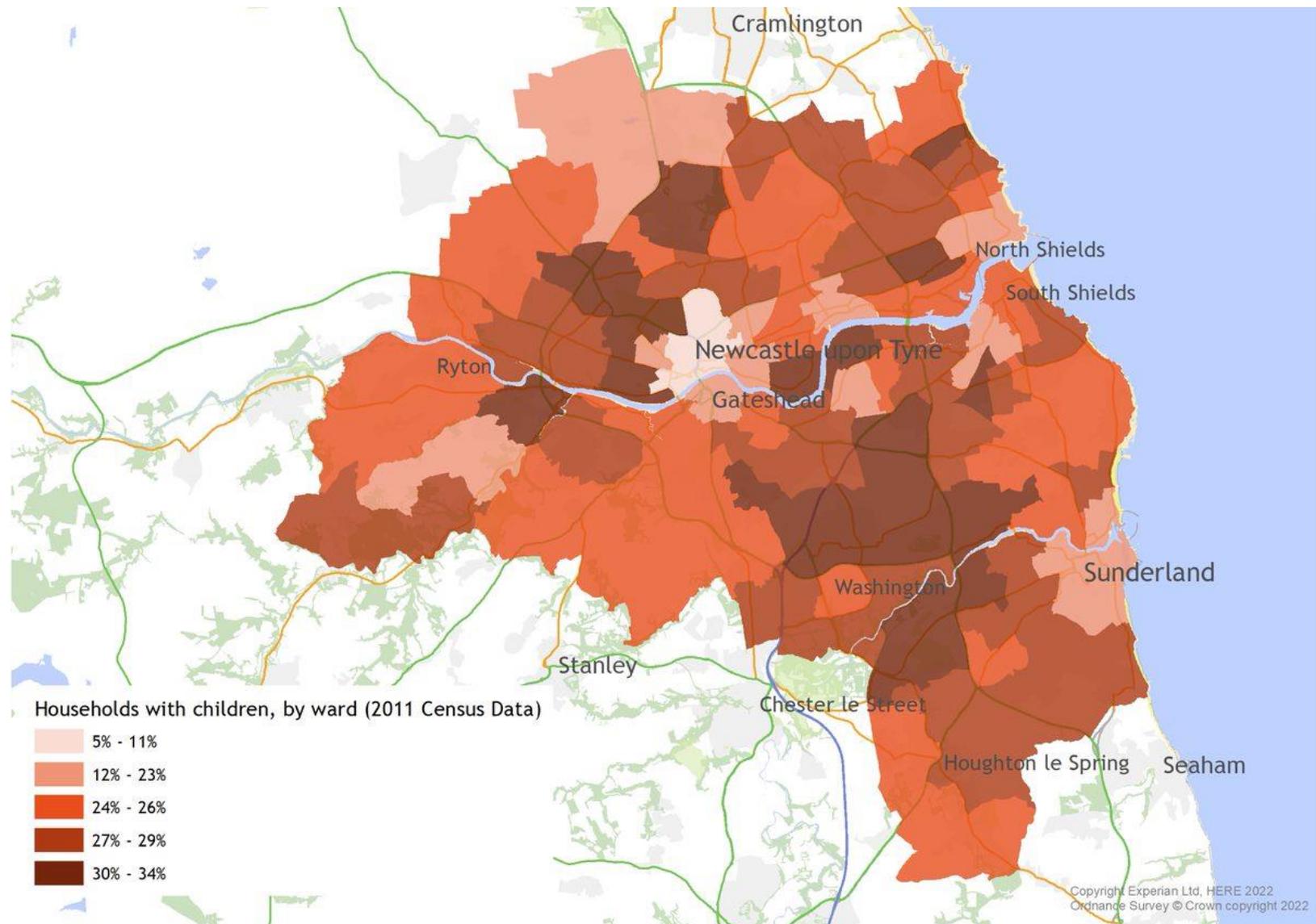
# Audience Concentrations



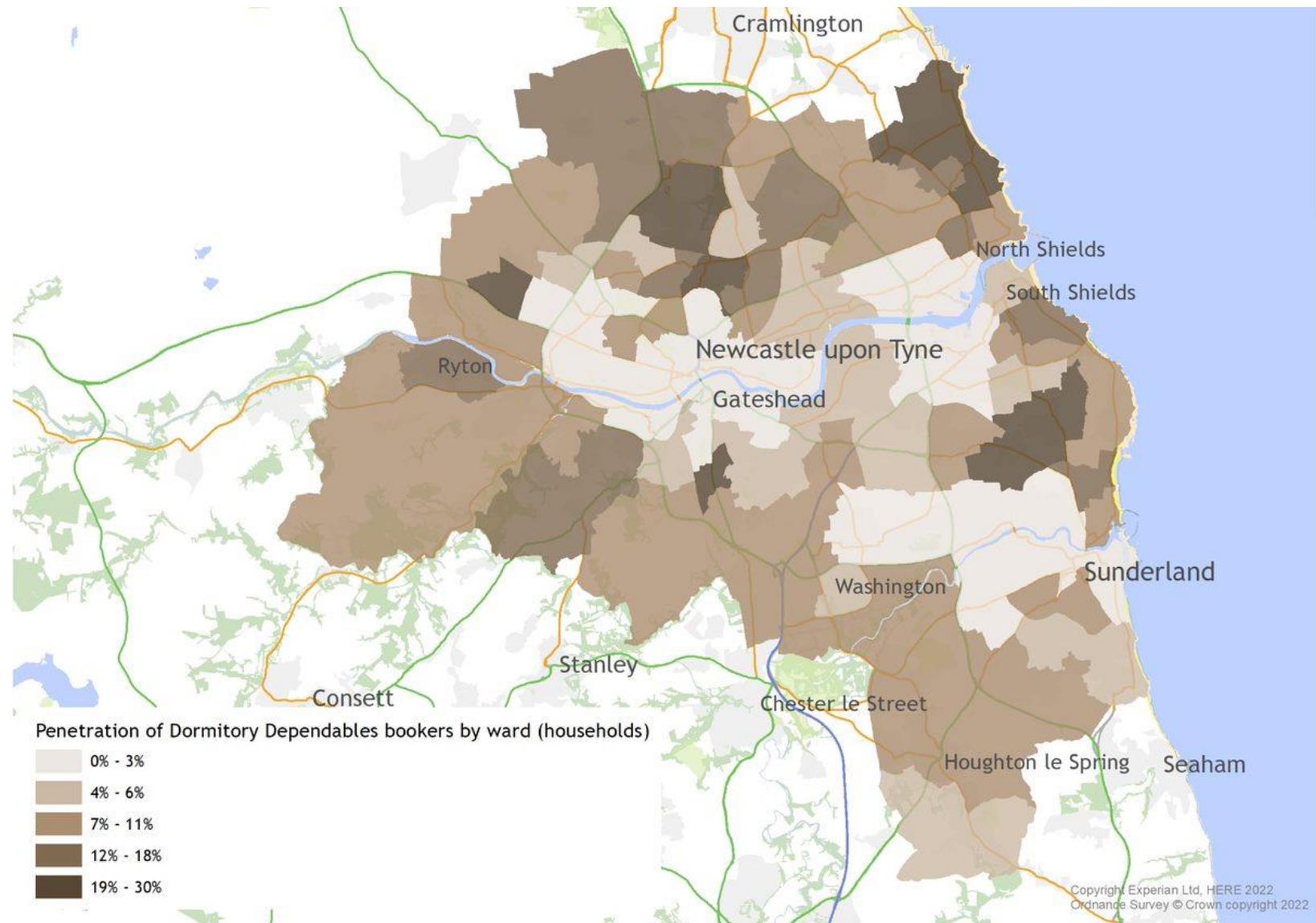
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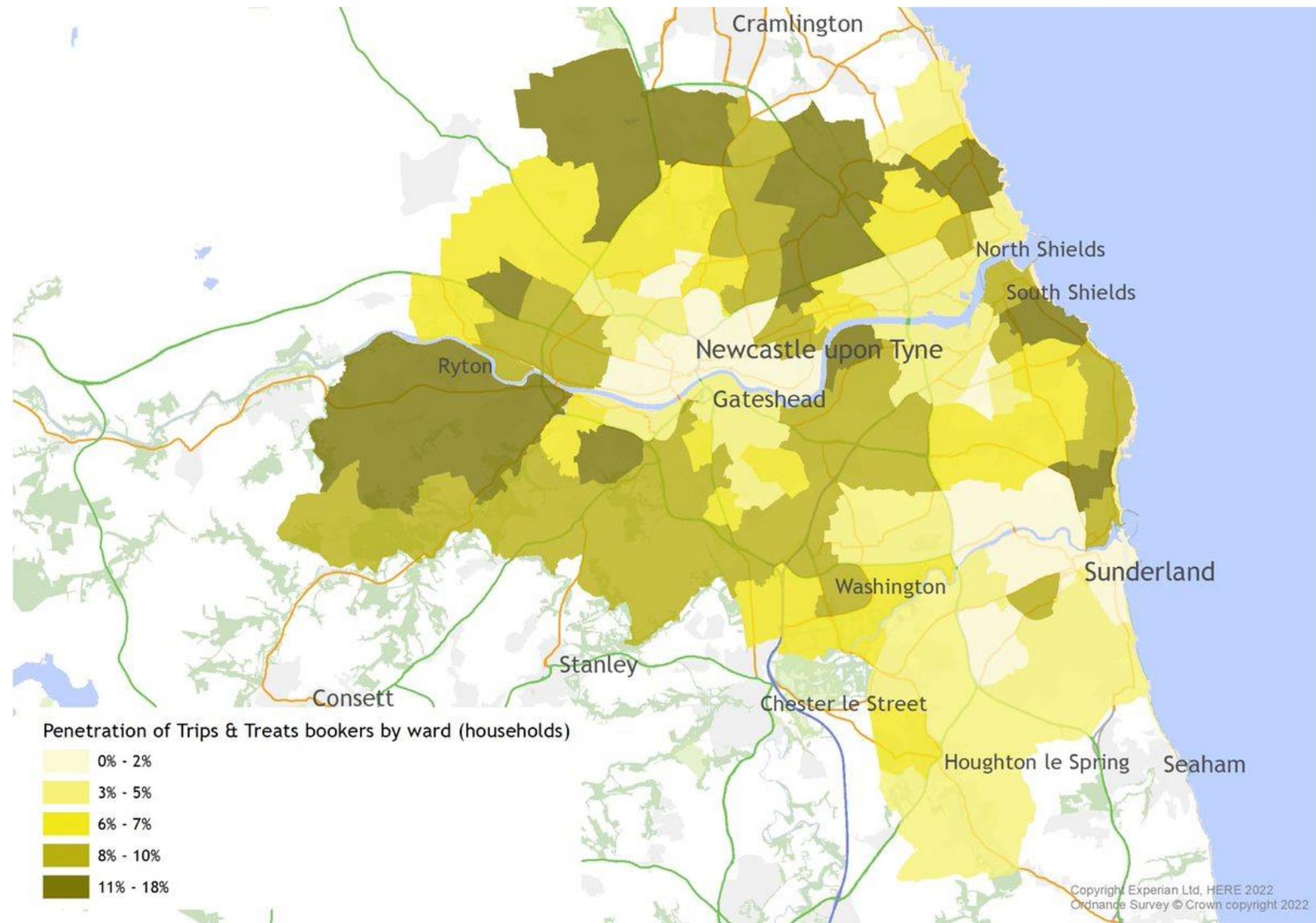
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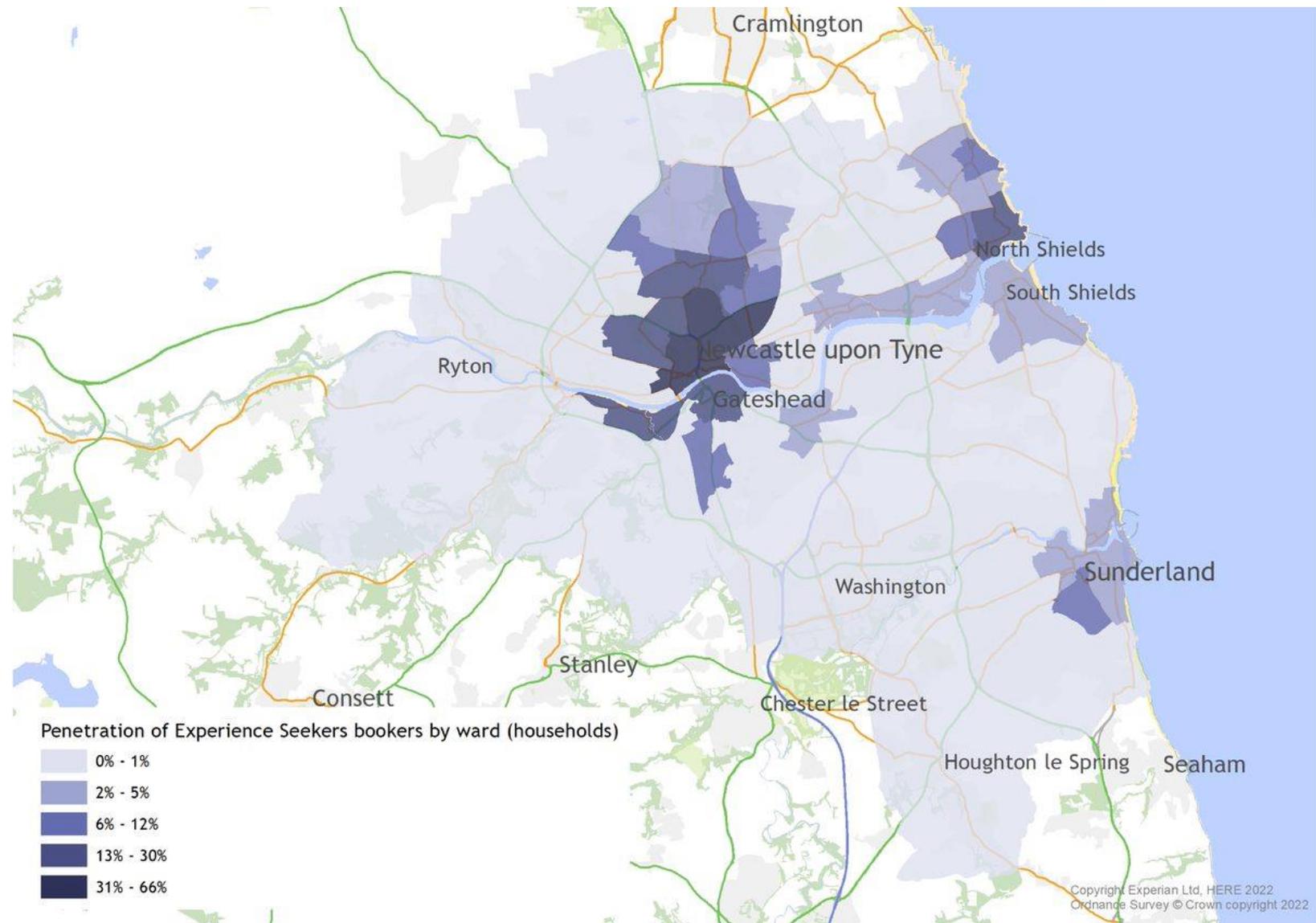
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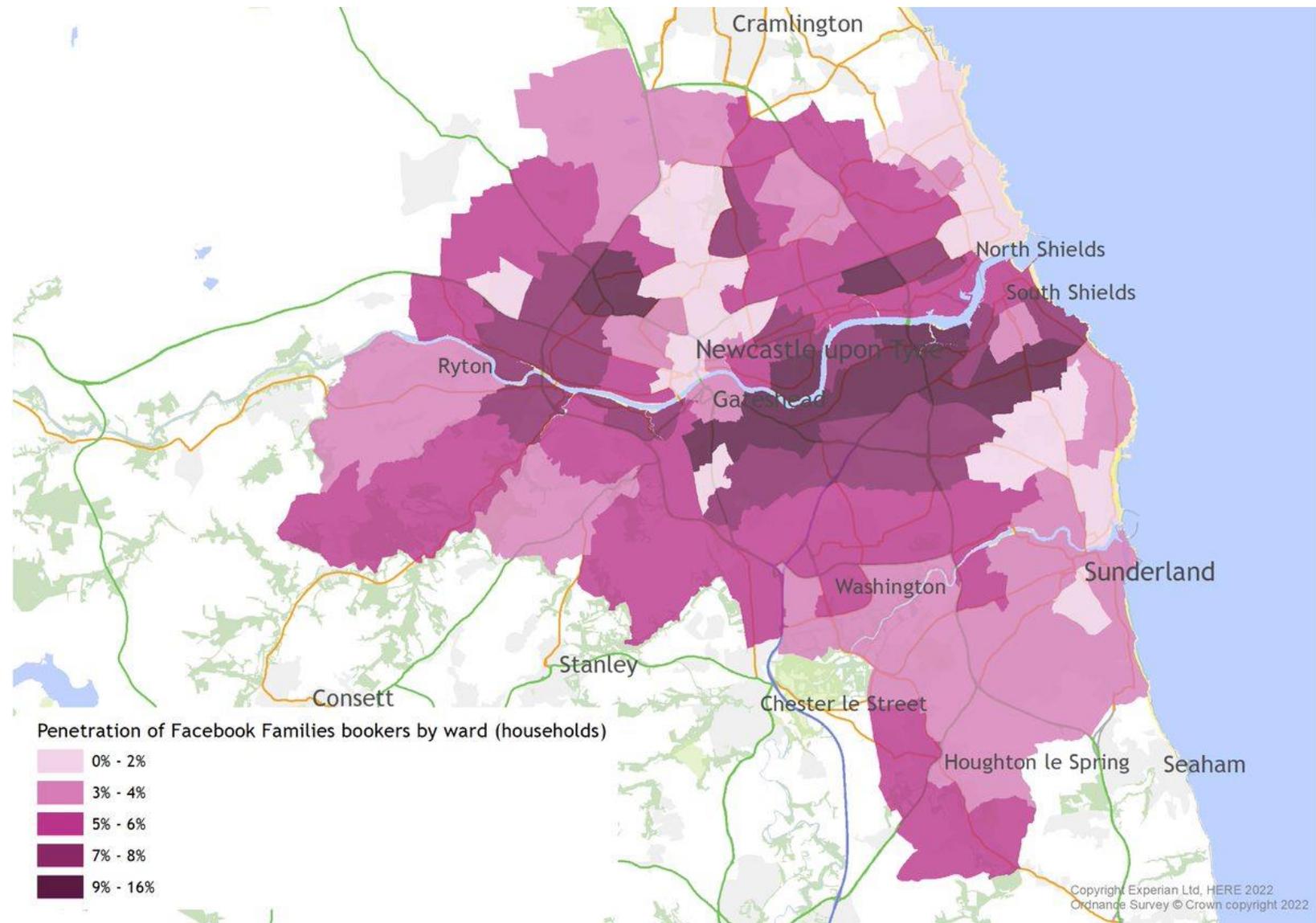
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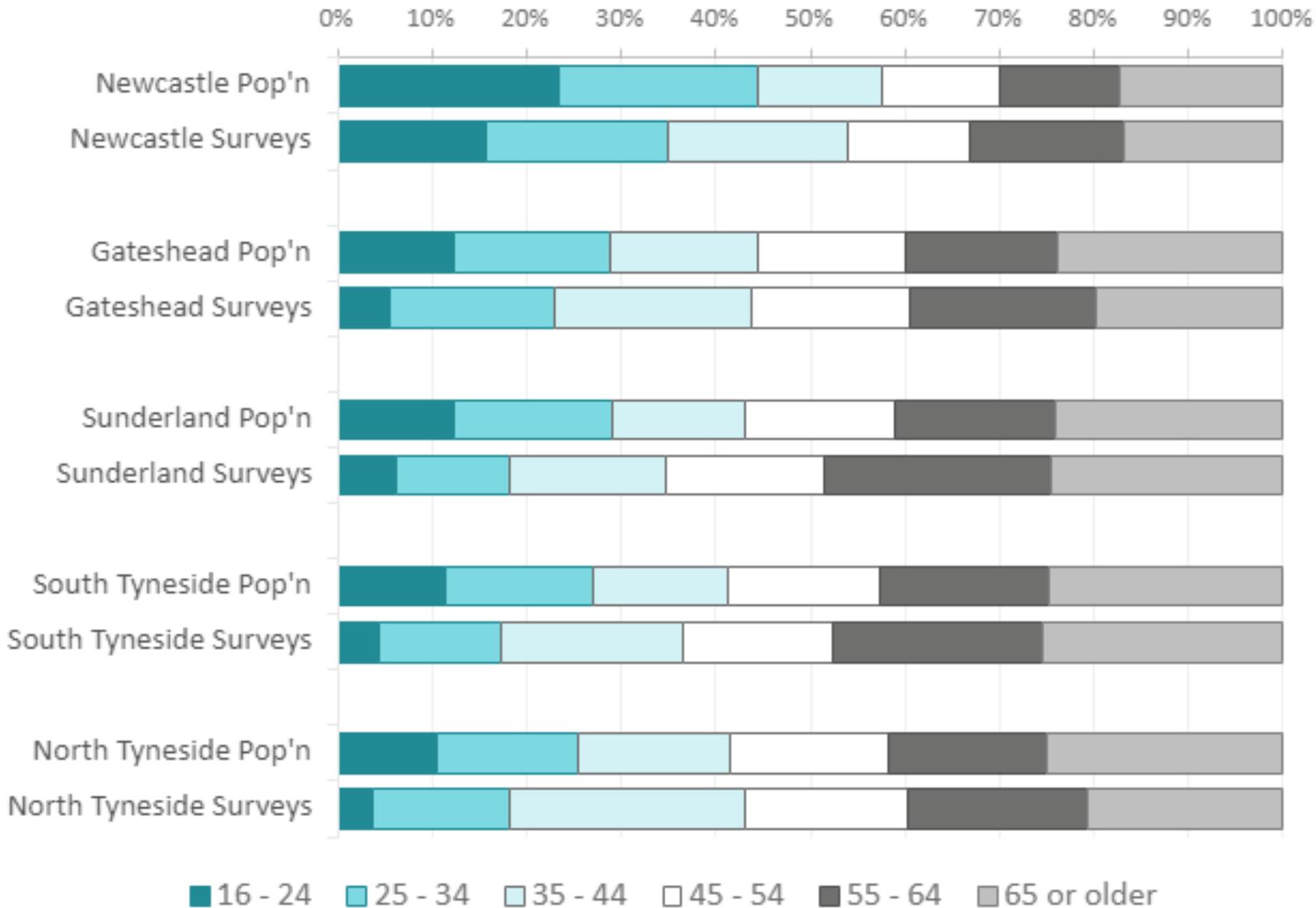


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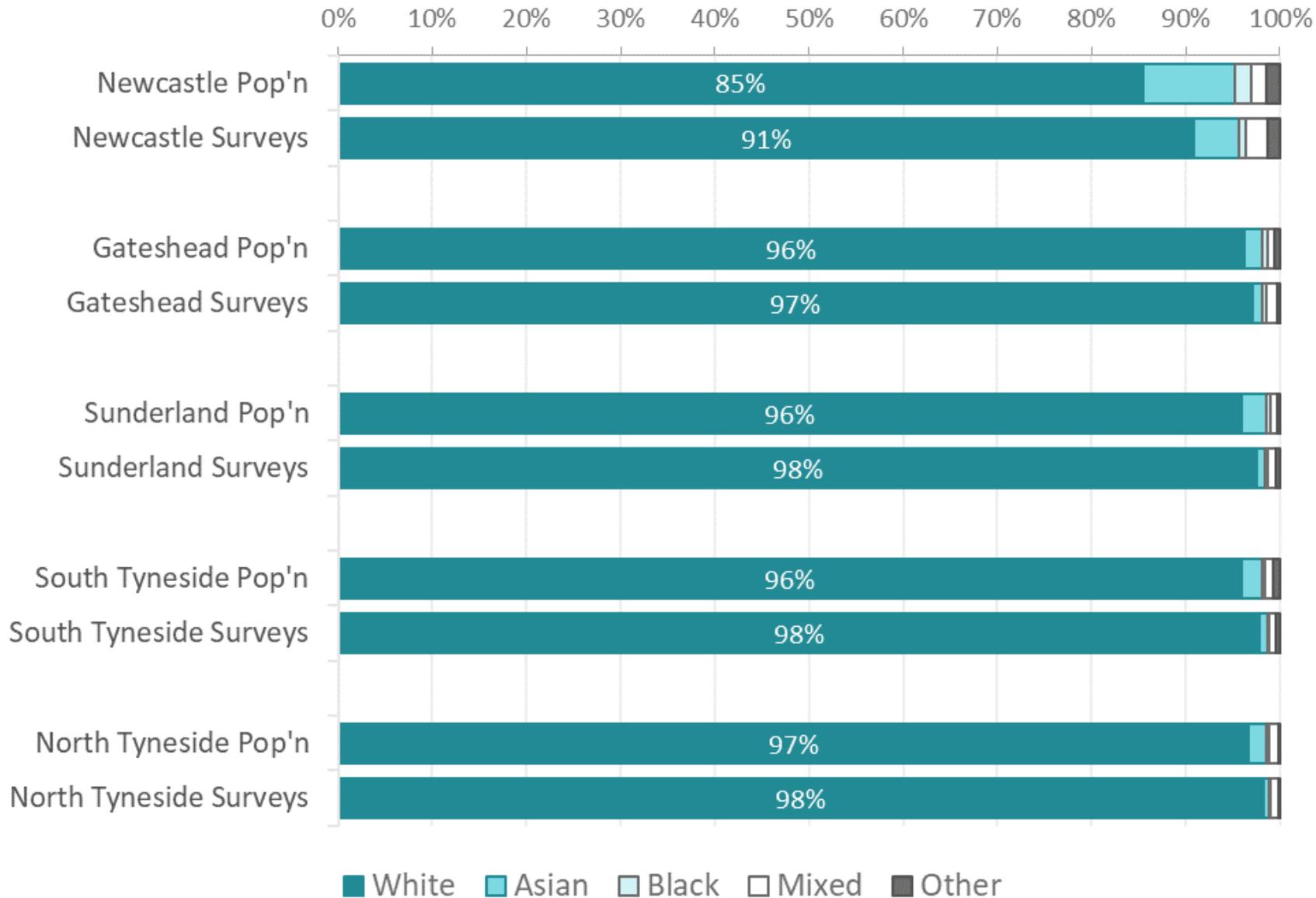


# Local Audiences Engagement (Surveys)

# Survey Data – Comparing the Cities/ Local Authorities

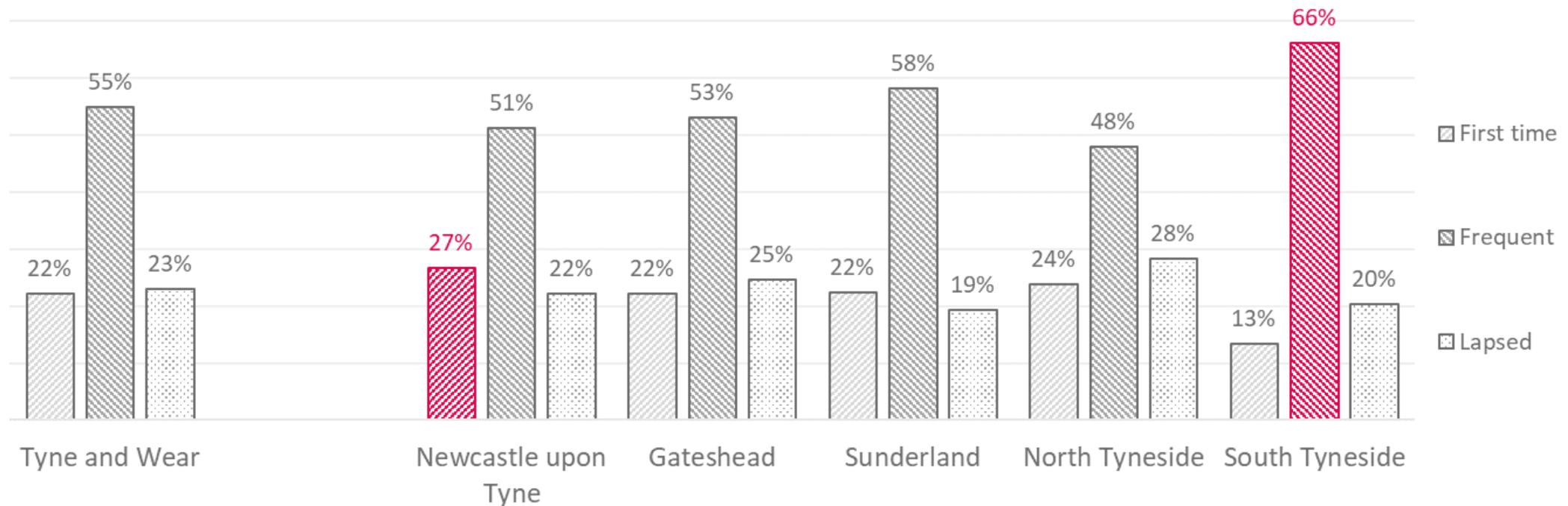


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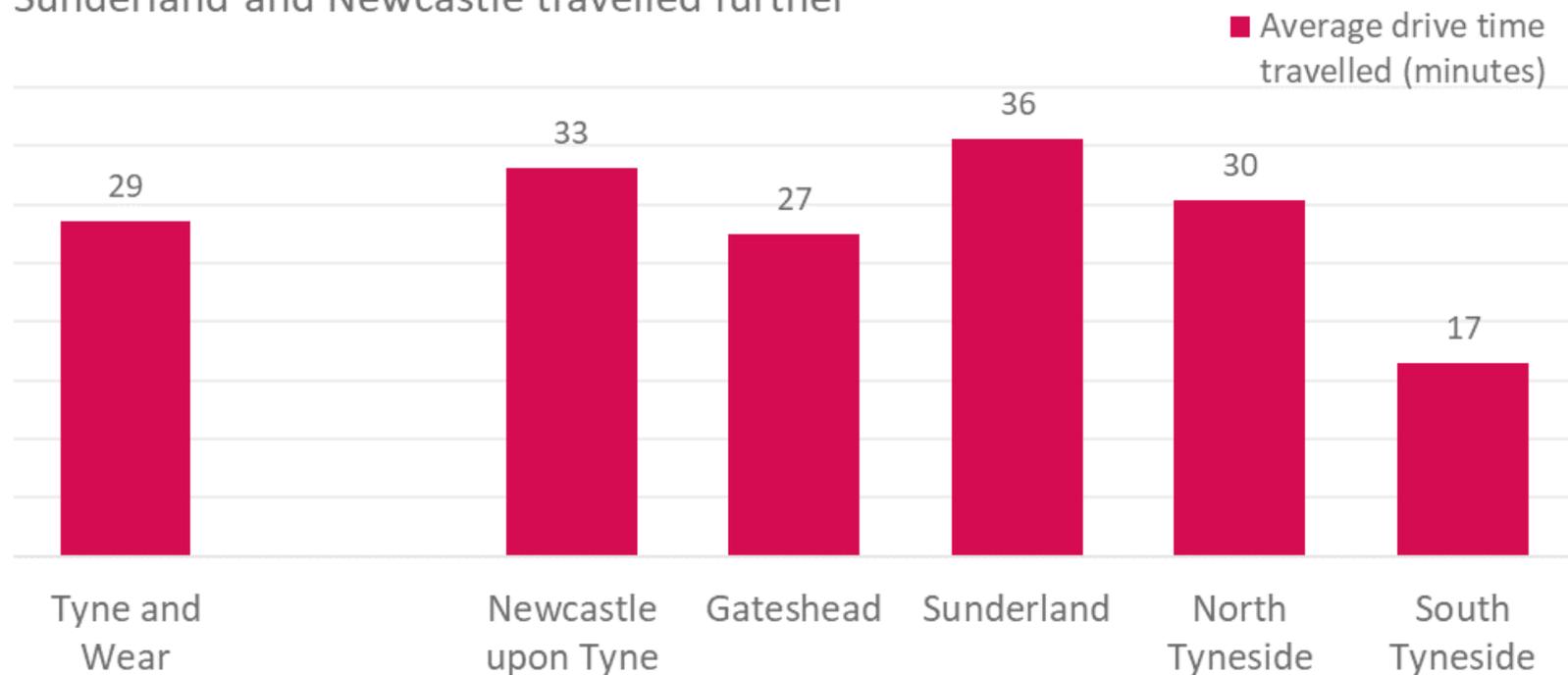
# Population Data – Comparing the Cities/ Local Authorities

Visitors from South Tyneside are more likely to be frequent visitors, visitors from Newcastle are more likely to be first-time visitors



# Population Data – Comparing the Cities/ Local Authorities

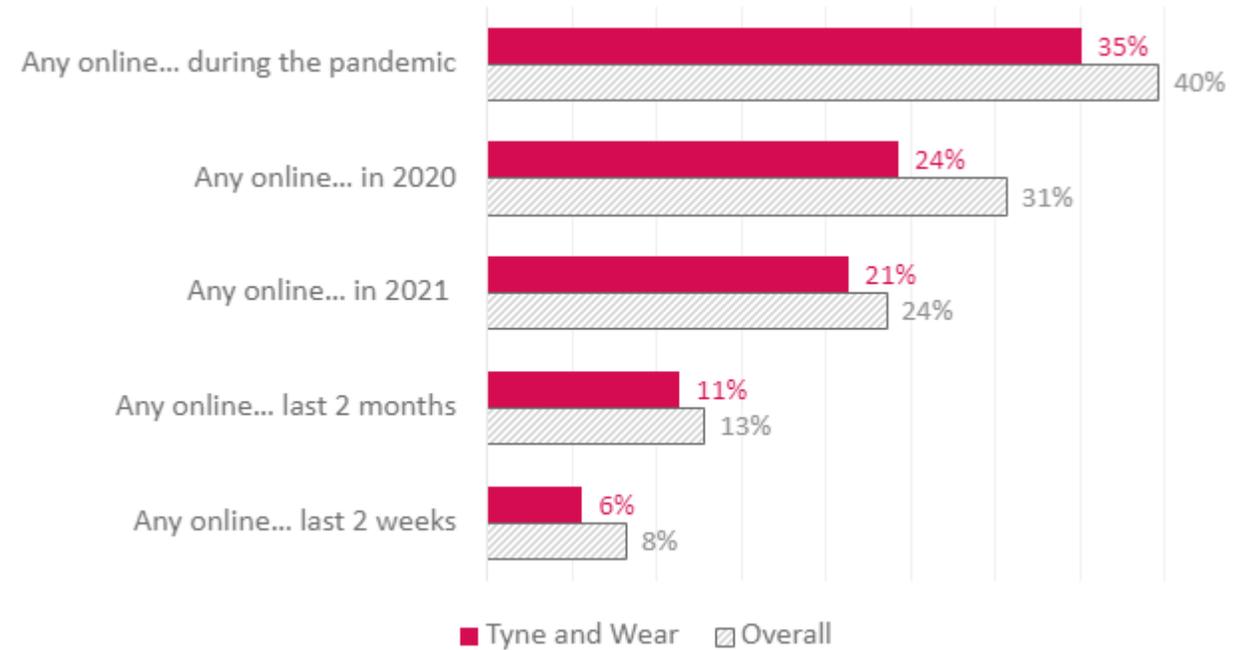
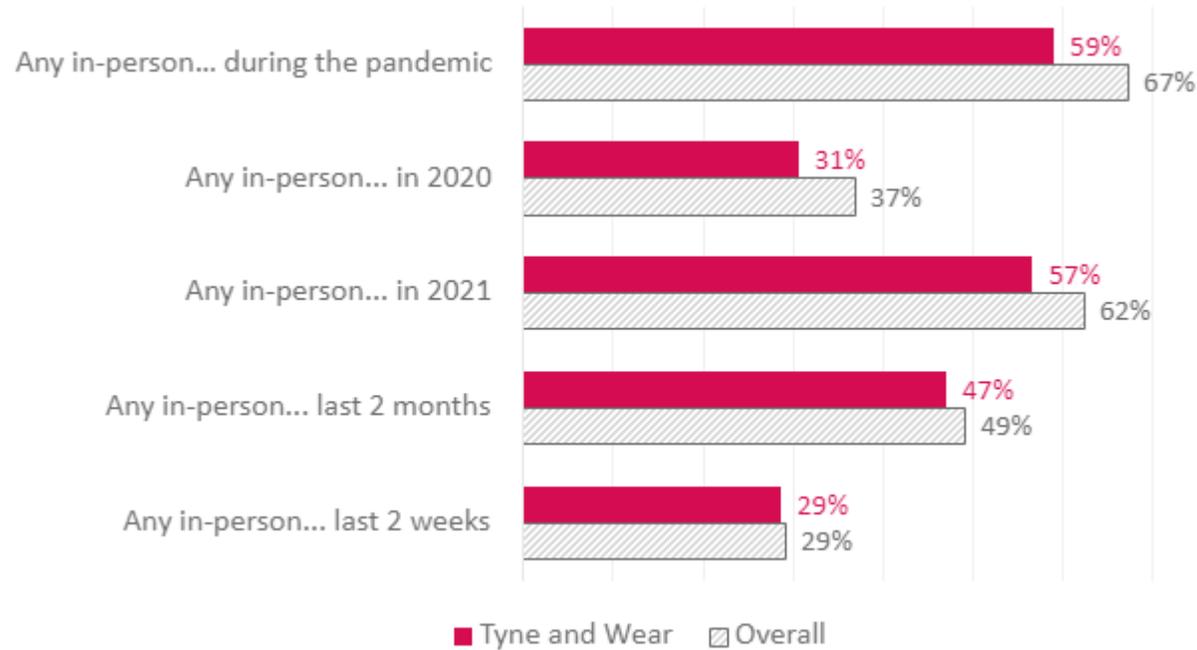
Visitors from South Tyneside tended to travel less far, visitors from Sunderland and Newcastle travelled further



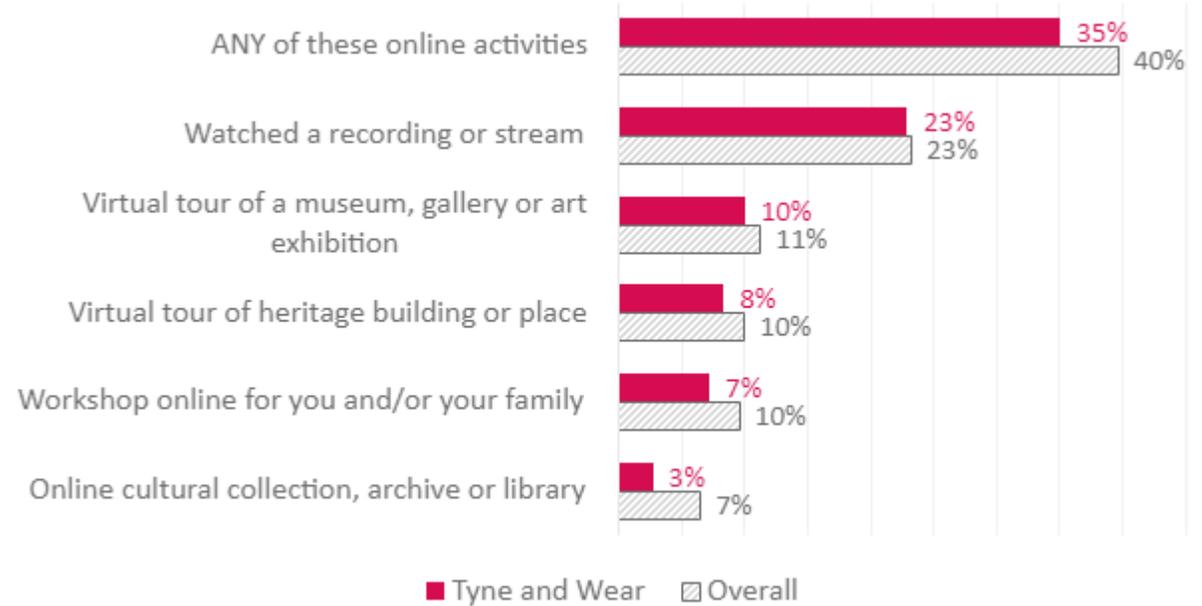
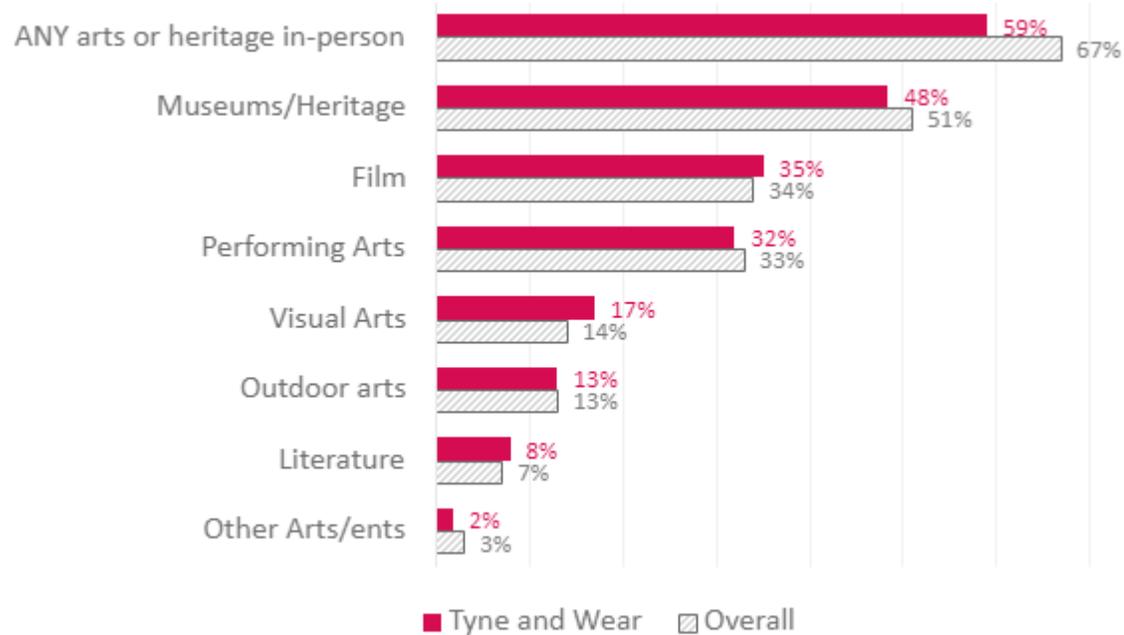
# Local Audiences

Engagement (Cultural Participation Monitor)

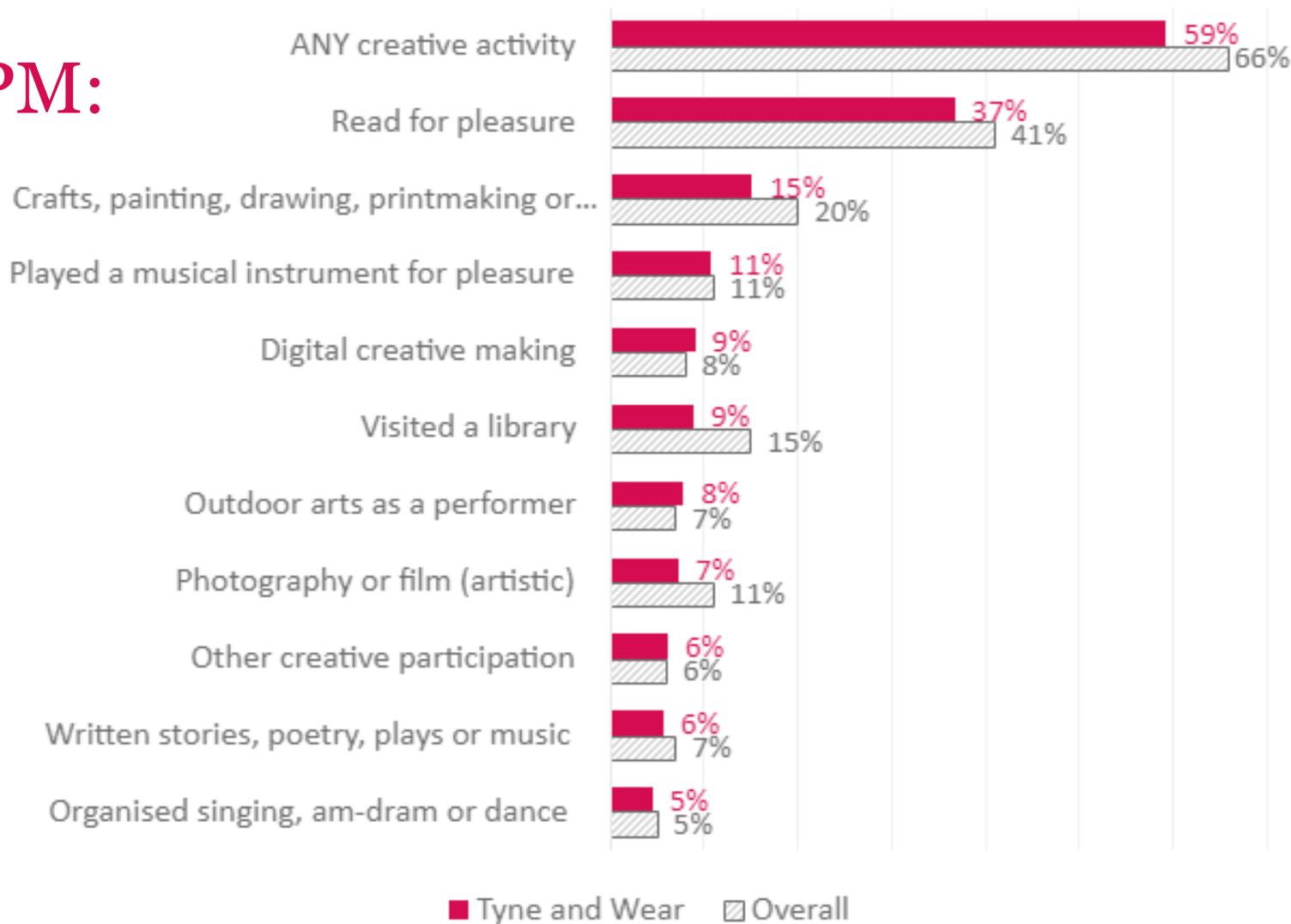
# Engagement from CPM: During COVID



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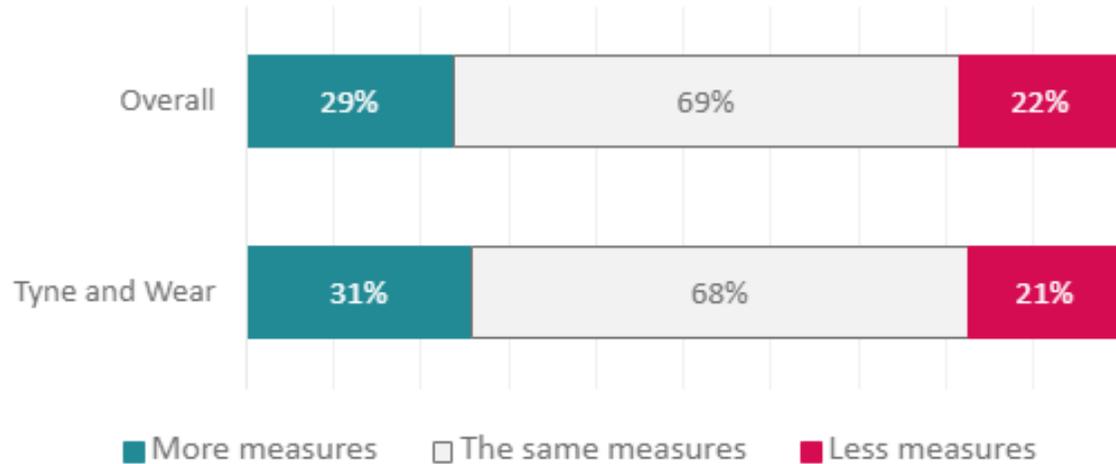


# Engagement from CPM: During COVID

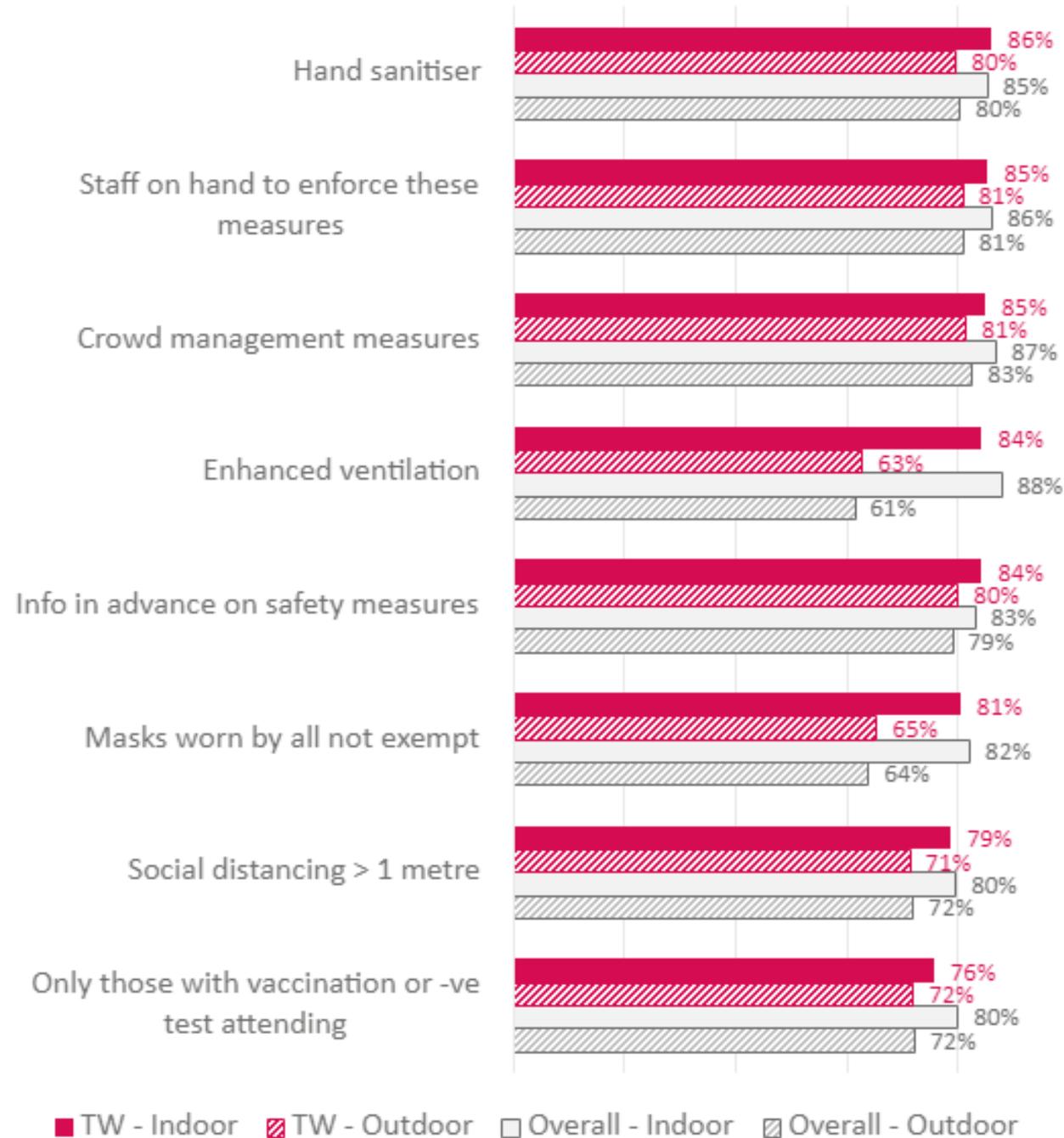


# Attitudes to Measures (CPM)

If attending again, would you want...?

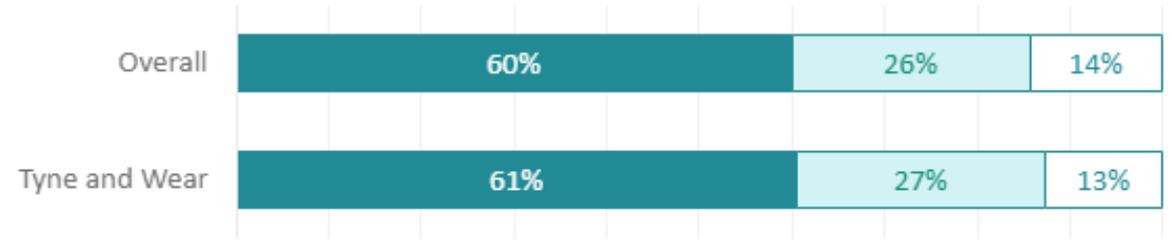
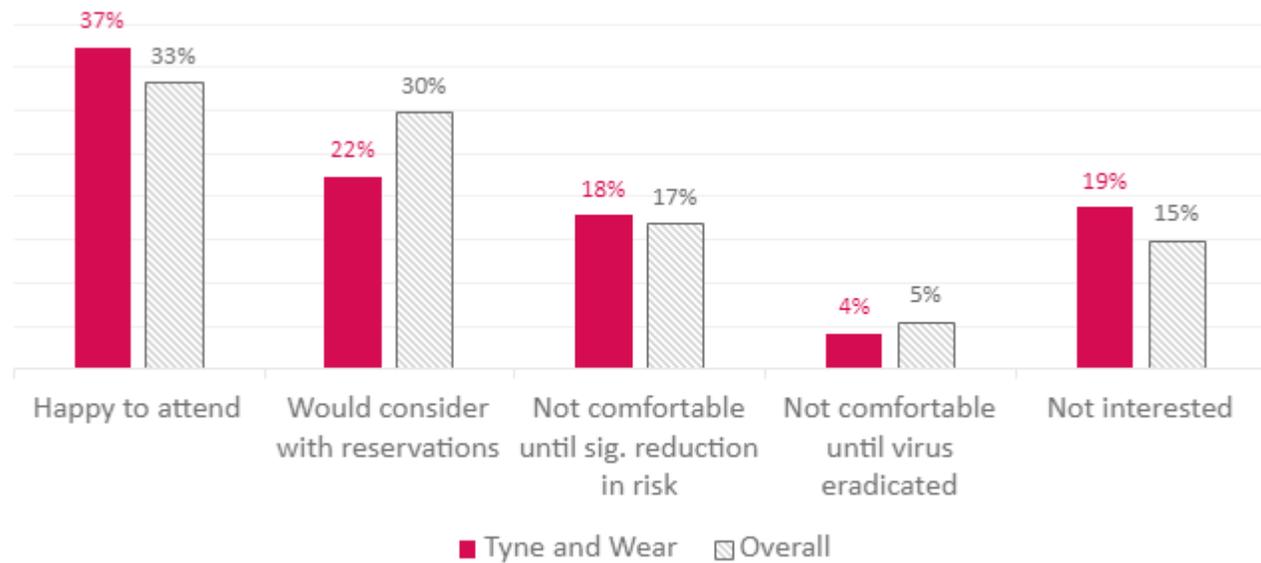


% rating the measure 'very important' or 'important' to feel comfortable:



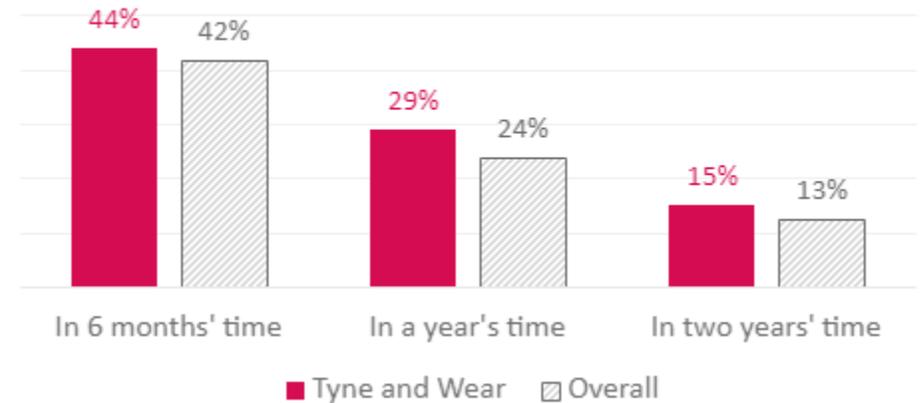
# Top Lines from Cultural Participation Monitor

Generally in line, or less concerned, than the overall population.

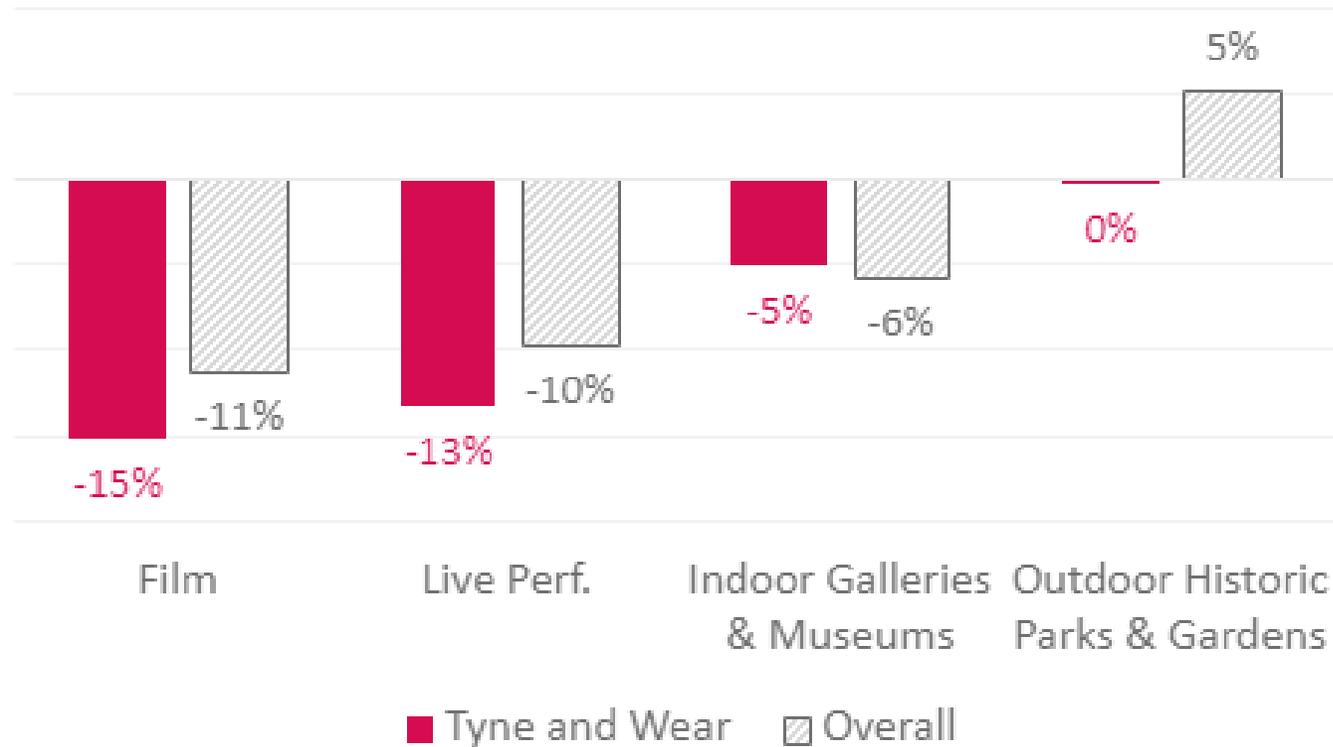


- We should do everything we can to reduce it
- We should make some efforts to try to reduce it, but not go too far
- It's just something we have to accept and try to live normally

% Who Think COVID is 'Very Likely' to Still Have Impact...

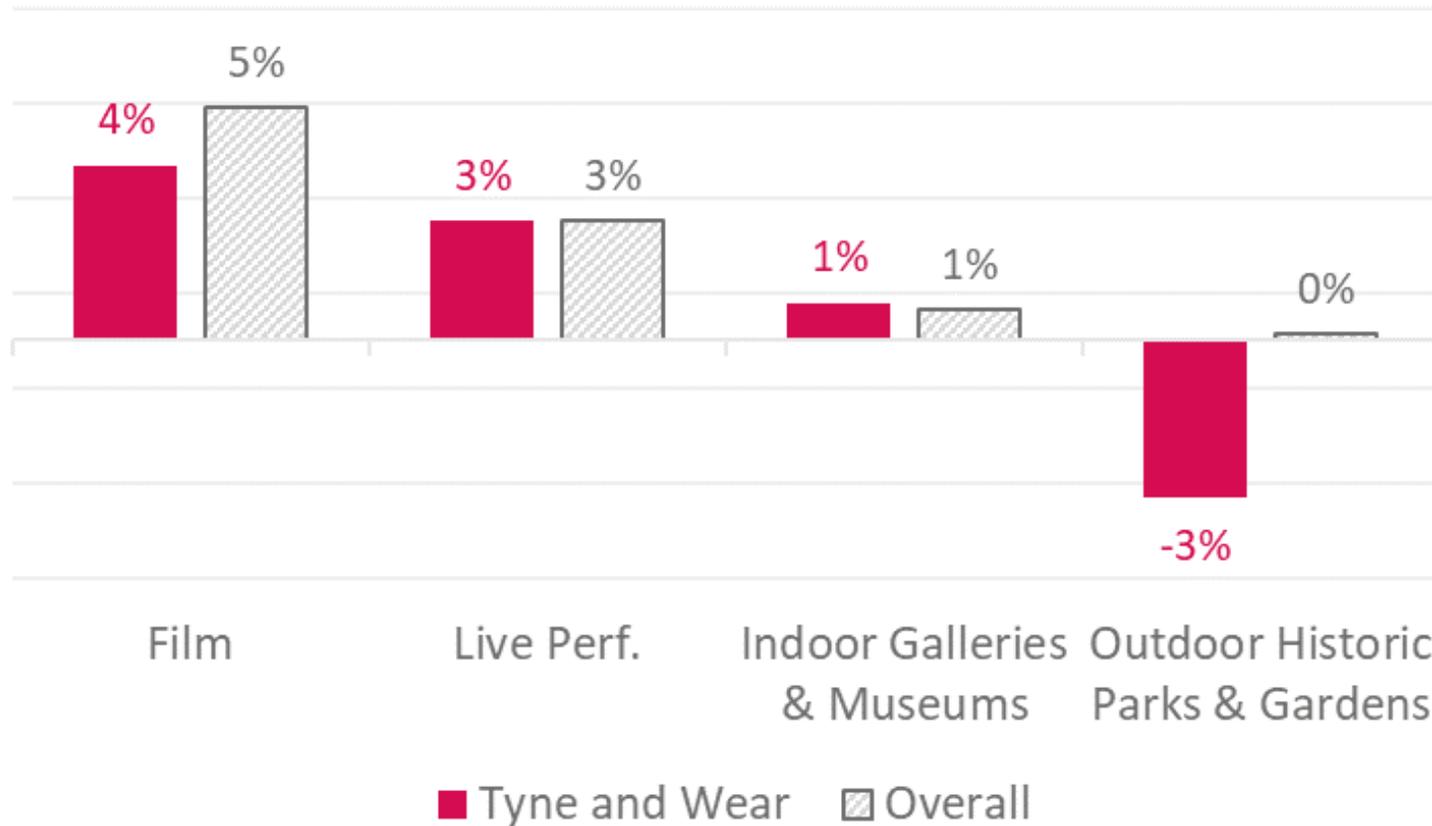


# Future Attendance: Net More – Less



Note: Figures are net % more-less, on a scale of 1 (more often) to 5 (less often), where 3 is 'the same' and 2 and 4 are half-weighted.

# Future Attendance: Net Closer – Further



Note: Figures are net % closer-further from home, on a scale of 1 (closer to home) to 5 (further from home), where 3 is 'the same' and 2 and 4 are half-weighted.

# Discussion

# In Conclusion...?

## From Evidence Presented:

- High %s of lower-engaged segments in pop'n, but not profiles (but some growing)
- Shift from older -> families / ES?
- Polarised willingness to attend (despite greater pessimism re COVID)
- Lower attendance before & during COVID
- Future more local and lower engagement?

## From Discussion...:

- Some online shifts will stay (e.g. online dance classes), but often digital activity has proved not very cost-effective, esp. given competition is Disney/ 'the best available worldwide' (but some success with getting an international audience from internationally-targeted ads).
- Some evidence of low cross-over between digital and core in-person audiences.
- Drops in audience figures for panto.
- Some in person offers benefit from alternative offers if it feels crowded.
- A shift towards family audiences for several organisations (and signs of older audiences being slower to return)

# In Conclusion...?

## Experience Seekers:

- Very geographically concentrated
- Over-represented
- Keen to return post-COVID

## Dormitory Dependables and Trips & Treats:

- Highest in bookers: many areas where dominant among bookers, even though not among population.

## Facebook Families:

- Largest group by population, but under-represented
- Lots in Gateshead / Hebburn / Jarrow, also Blakelaw
- Growing most and willing to return, but particularly exposed to cost-of-living crisis?

# 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)

## Future:

- Audience Finder groups
- ‘Know your community’ free surgeries
- In Practice sessions
- Community Forum Live
  - Audience Finder Onboarding (23/3; 27/4; 25/5)
  - Museums & Visual Arts (28/4)
  - Christmas Shows (26/5)
- TEA Breaks (12/1 & monthly)

## In Development...:

- Audience Spectrum enhancements
- Regional dashboards

# Thank you

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

 the audience agency