Central Scotland

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

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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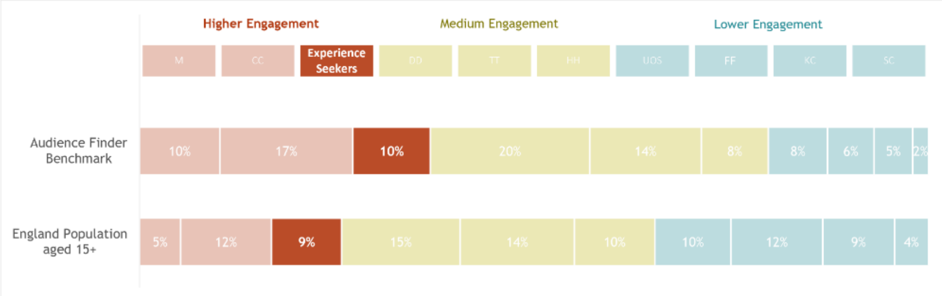

Key Statistics:

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:

Metrocultural | M1
Older, established and high-spending professional elites.

Metrocultural | 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?

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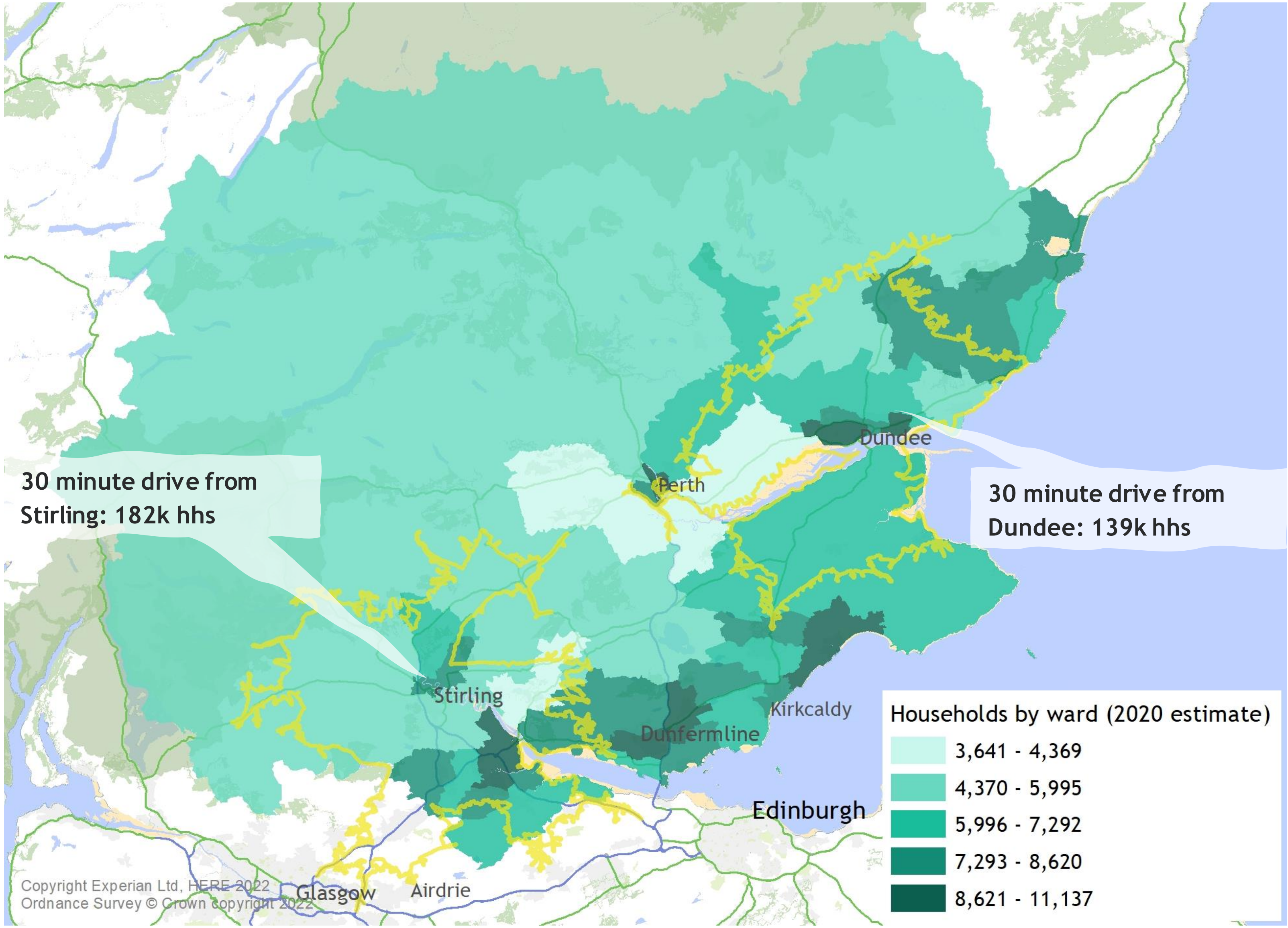
Local Area and Population

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

Population density by ward



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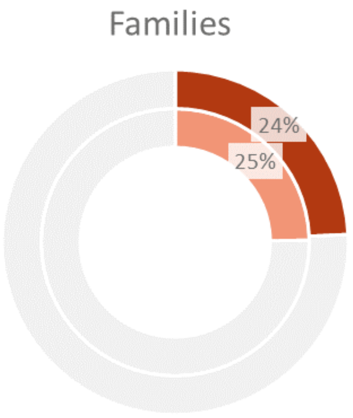
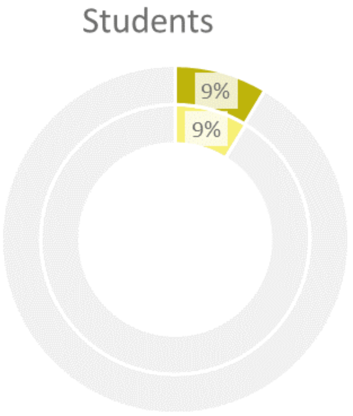
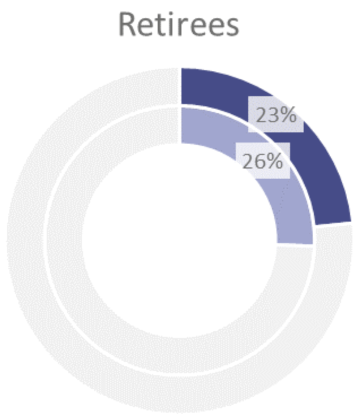
Population data – compared to rest of country

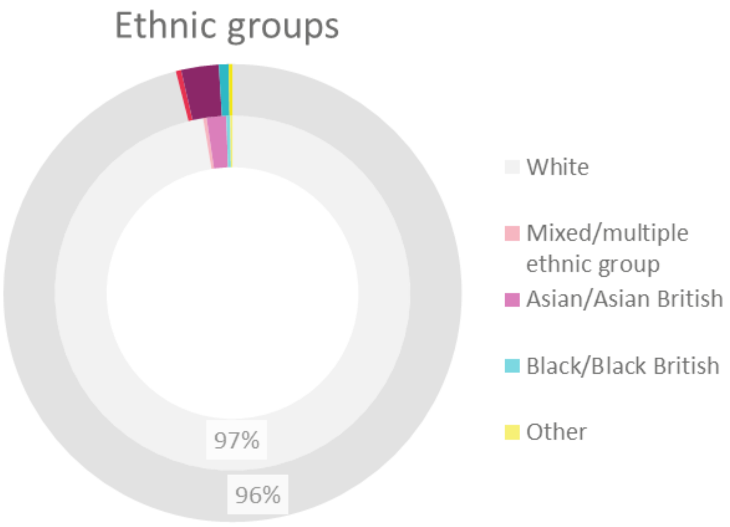
Outer ring: Scotland

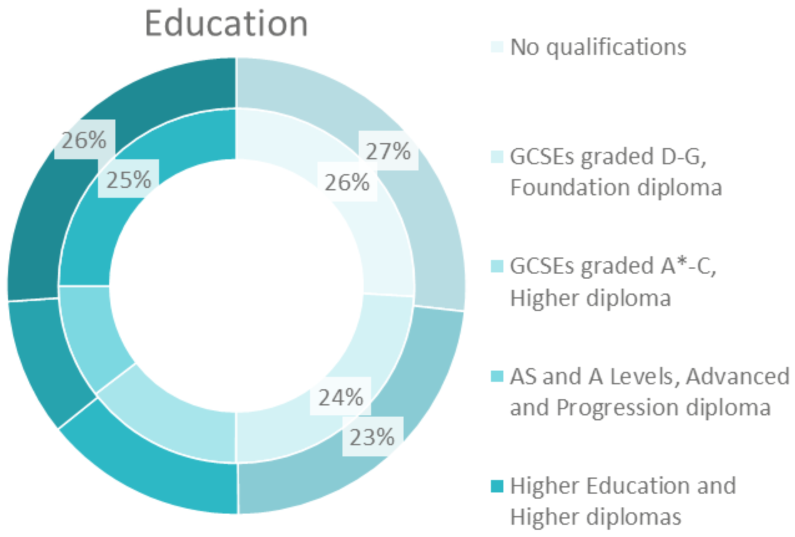
Inner ring: Central Scotland



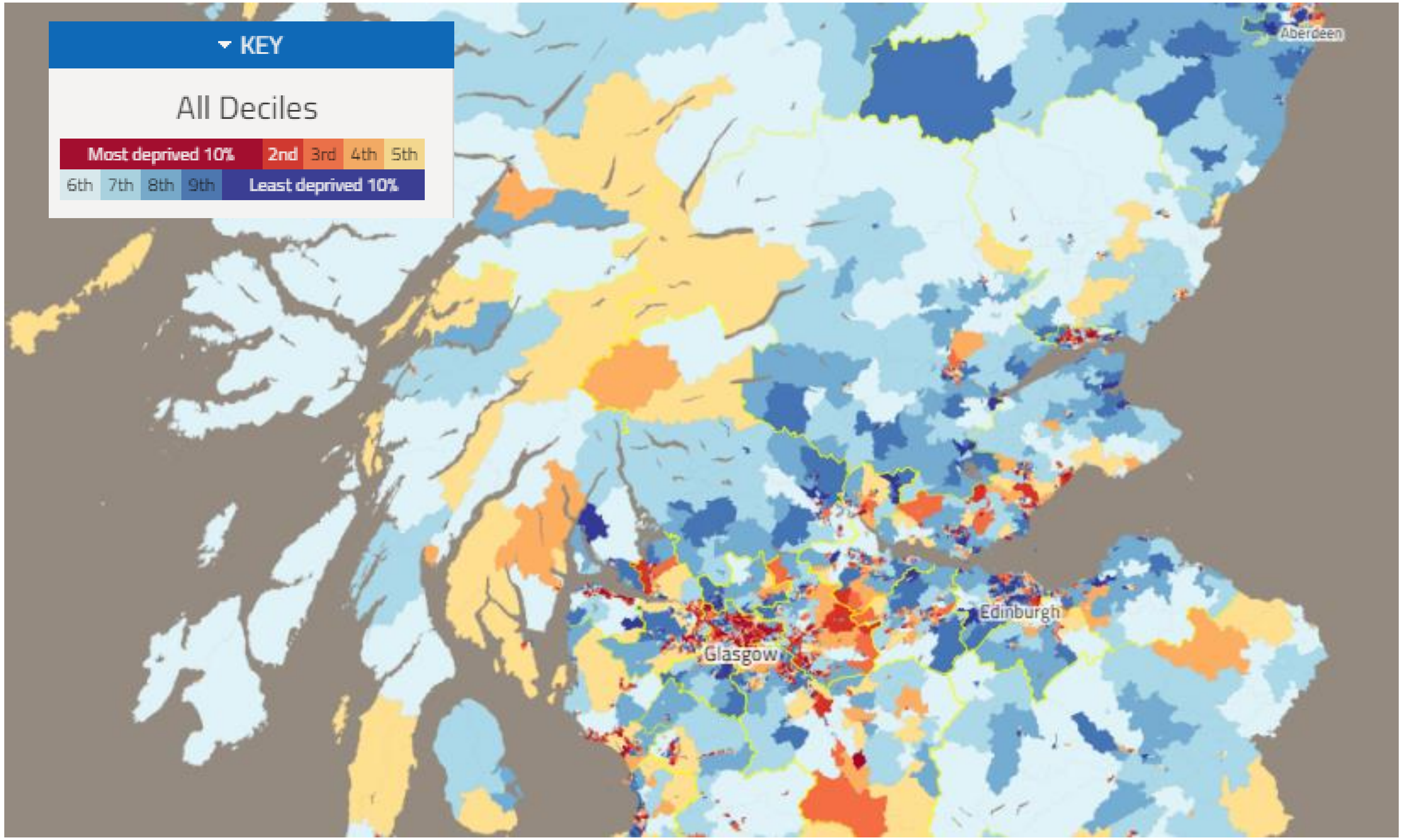


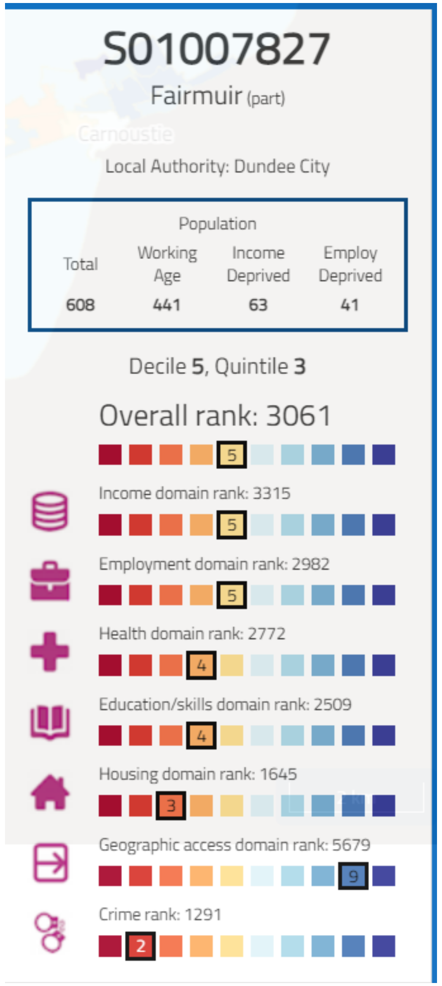






Population data – Indices of Multiple Deprivation https://simd.scot





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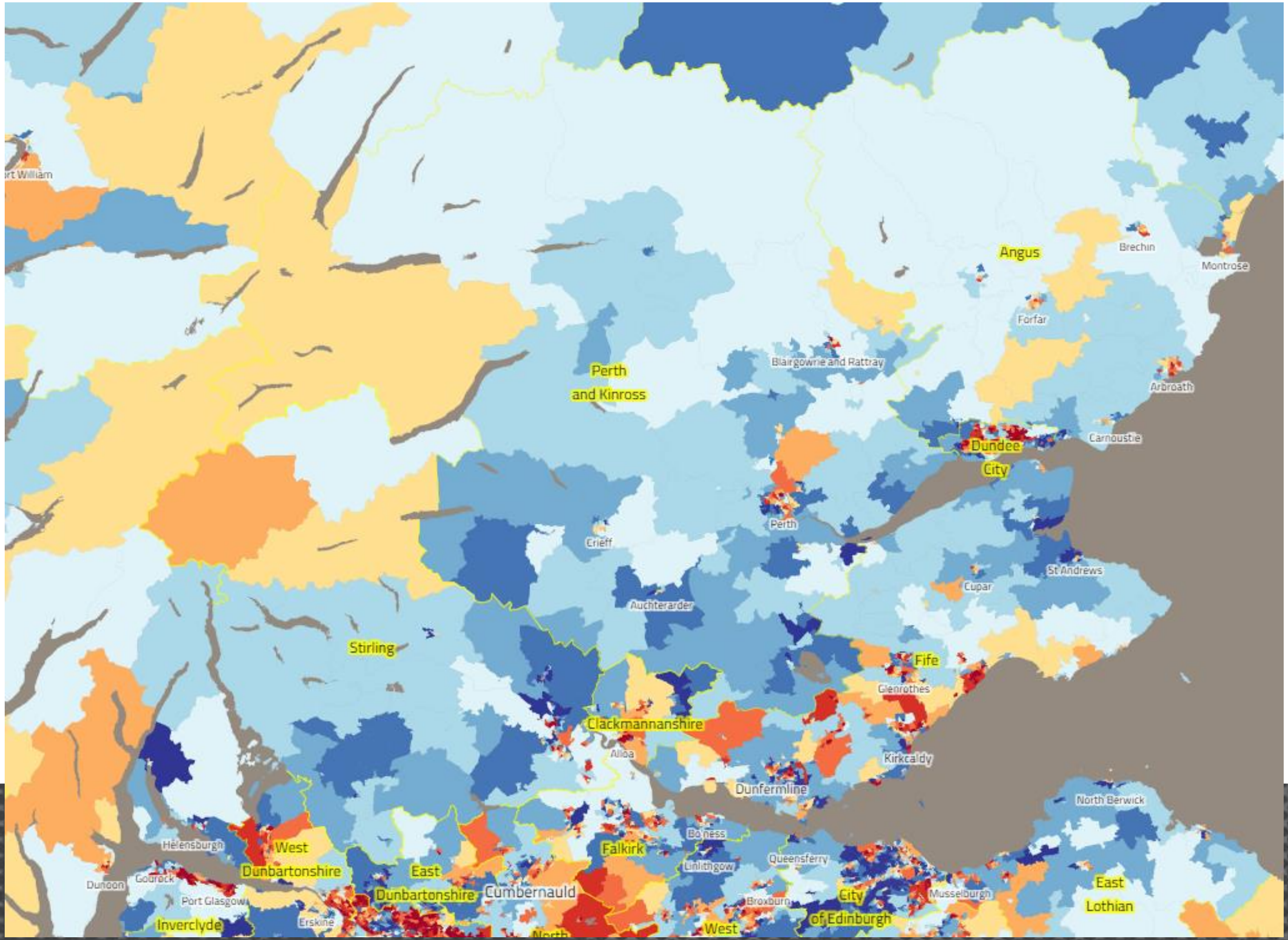

KEY

All Deciles

Most deprived 10%	2nd	3rd	4th	5th
6th	7th	8th	9th	Least deprived 10%

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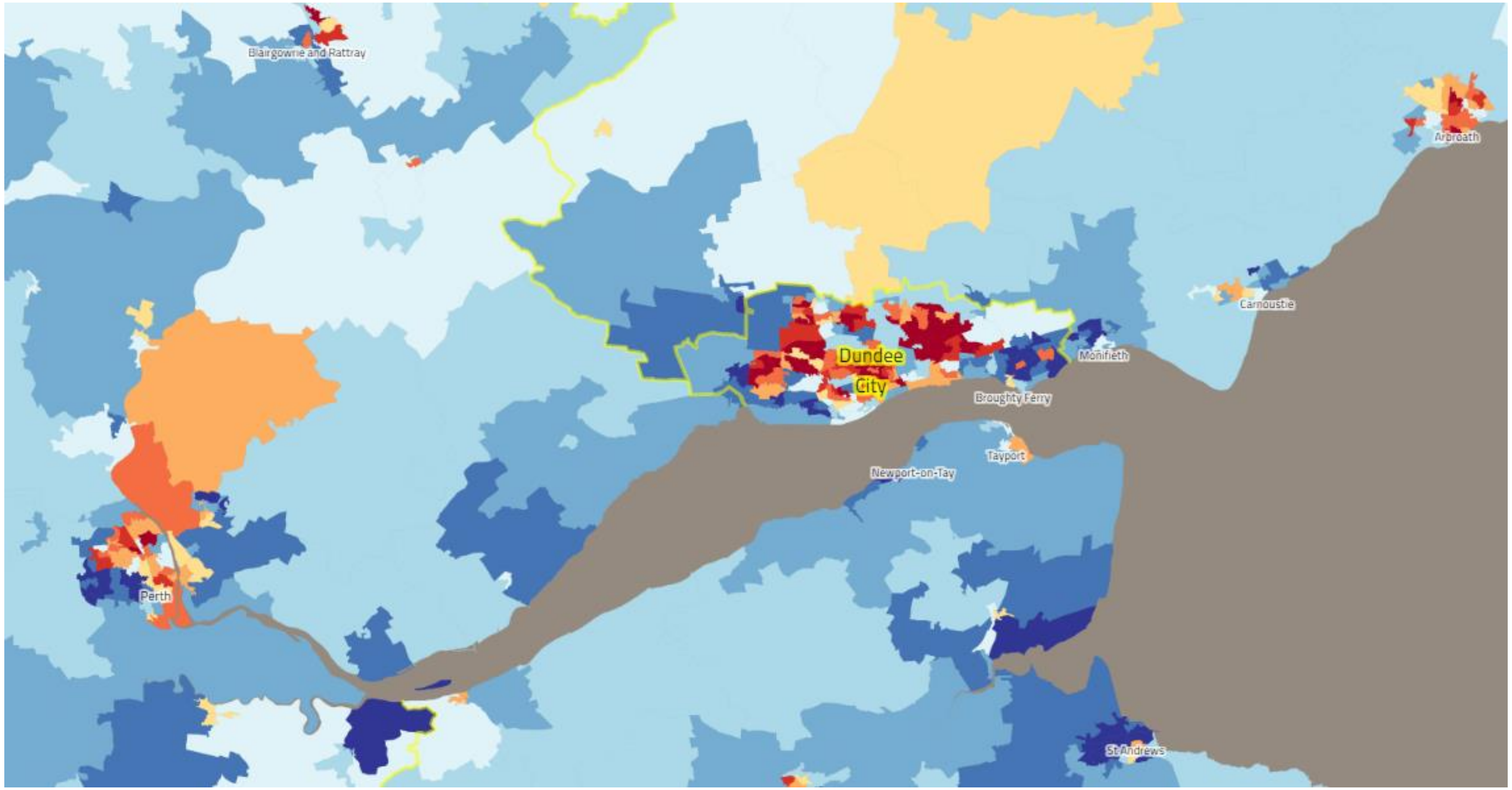

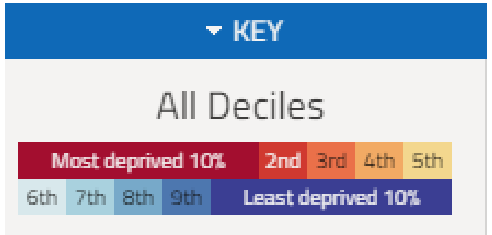

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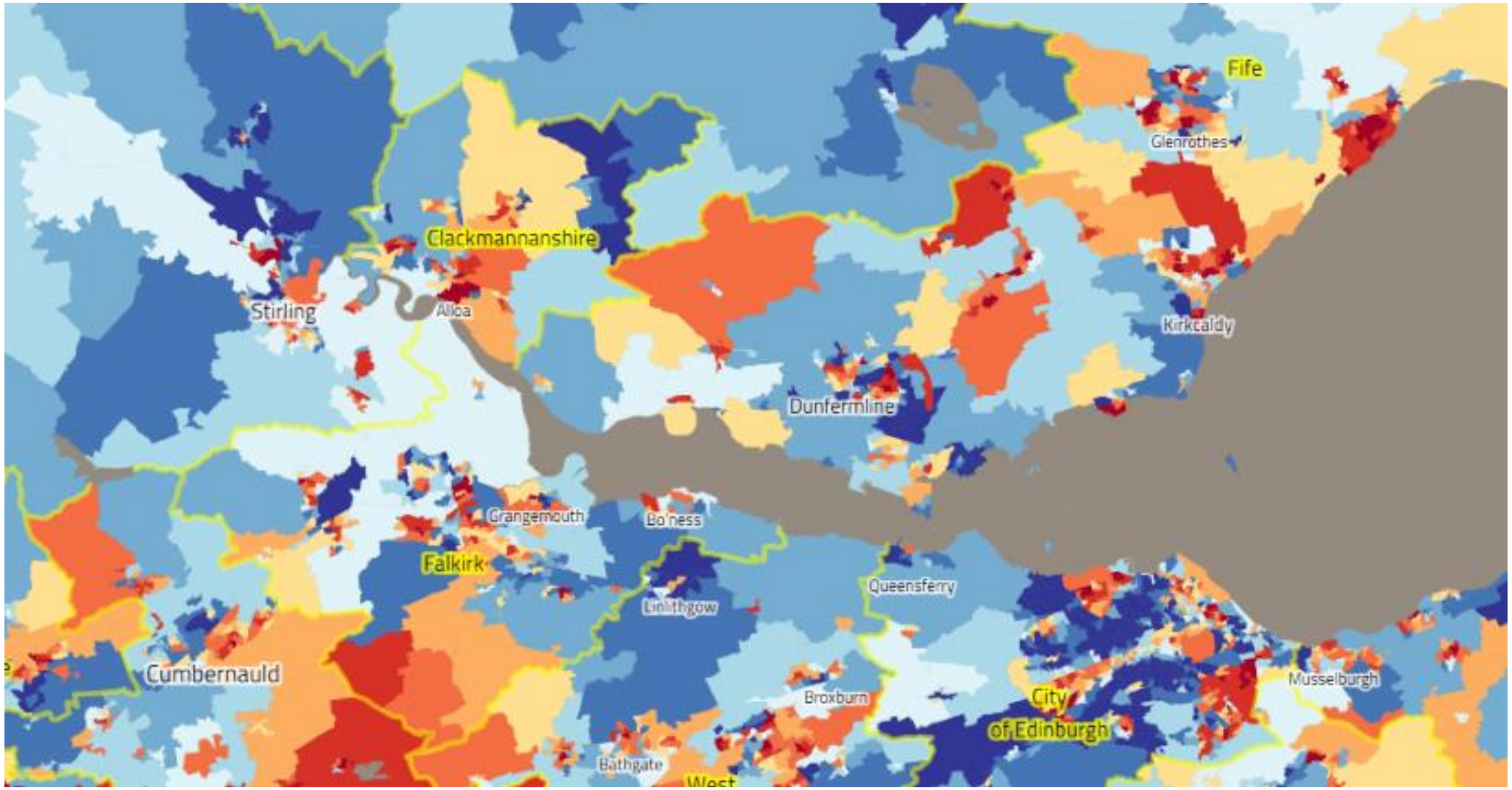
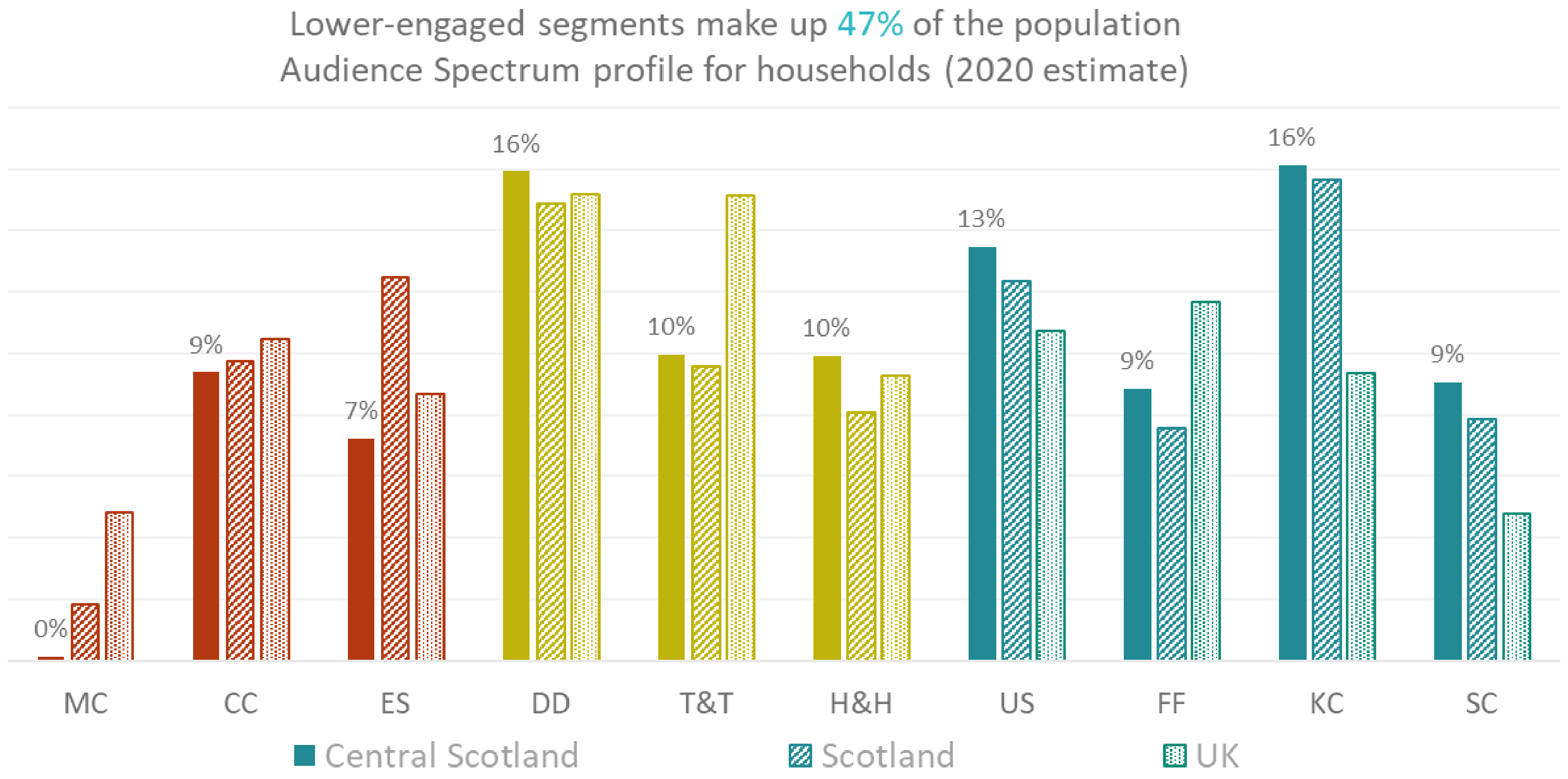
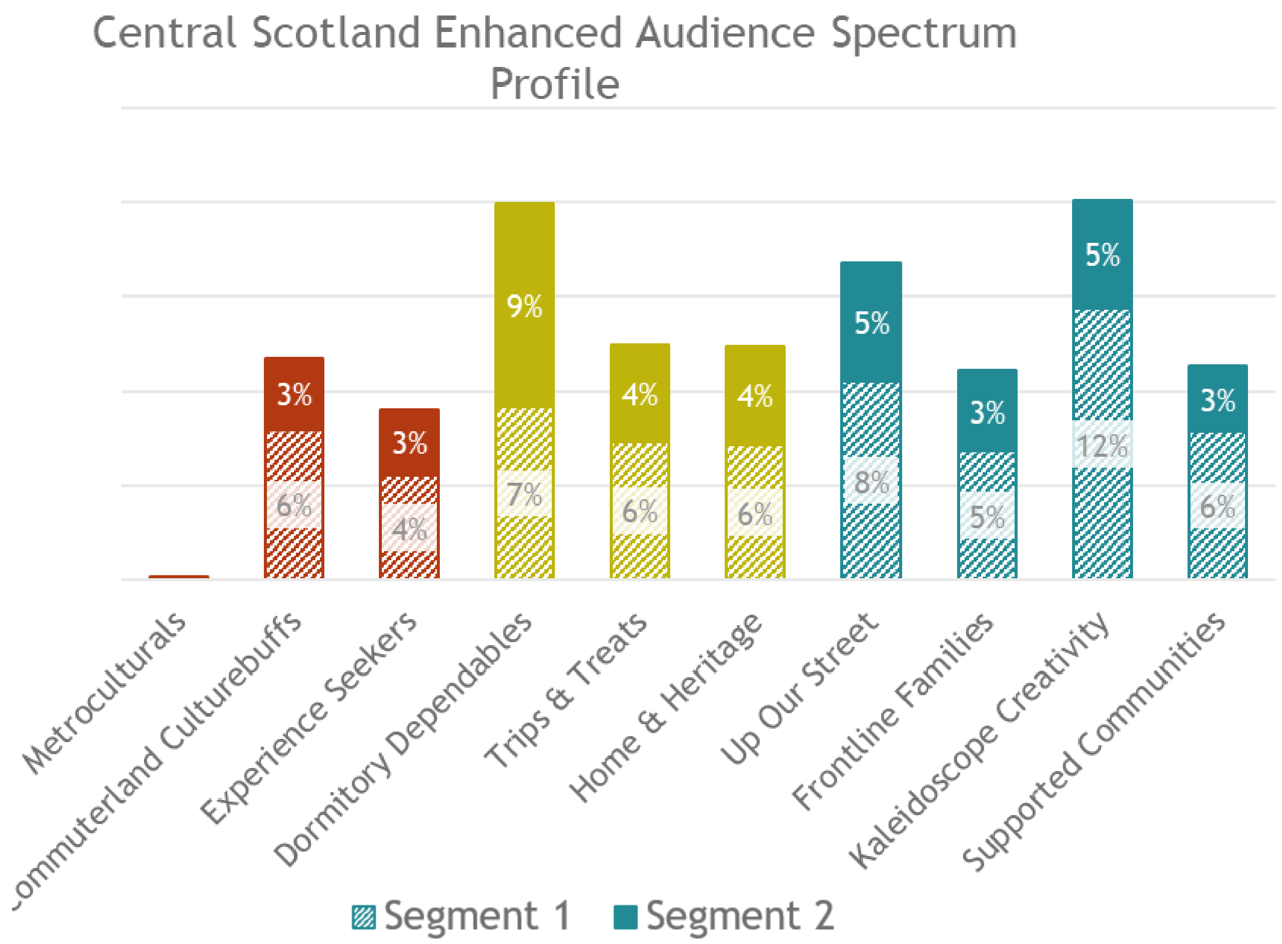


Overall Population Audience Spectrum Profile



Overall Audience Spectrum Profile: Enhanced



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

Population data – comparing the local areas

Fife: High UoS, FF, medium cultural engagement, middle aged

Falkirk: High KC, families, closest to Edinburgh and Glasgow

Dundee City: Most distinctive area: High ES, KC and SC, high cultural engagement, younger, Asian, families with young children

Perth and Kinross: High TT and HH, older & retired population, low for families

Angus: High UoS and HH, low levels of cultural engagement, older & retired population

Stirling: High CC, high levels of cultural engagement, families

Clackmannanshire: High KC, medium cultural engagement

504k total:

170k Fife

73k Falkirk

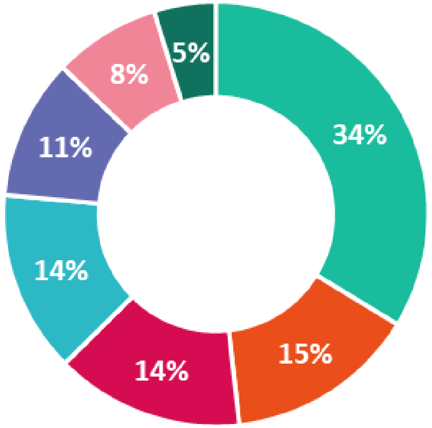
72k Dundee City

70k Perth and Kinross

54k Angus

41k Stirling

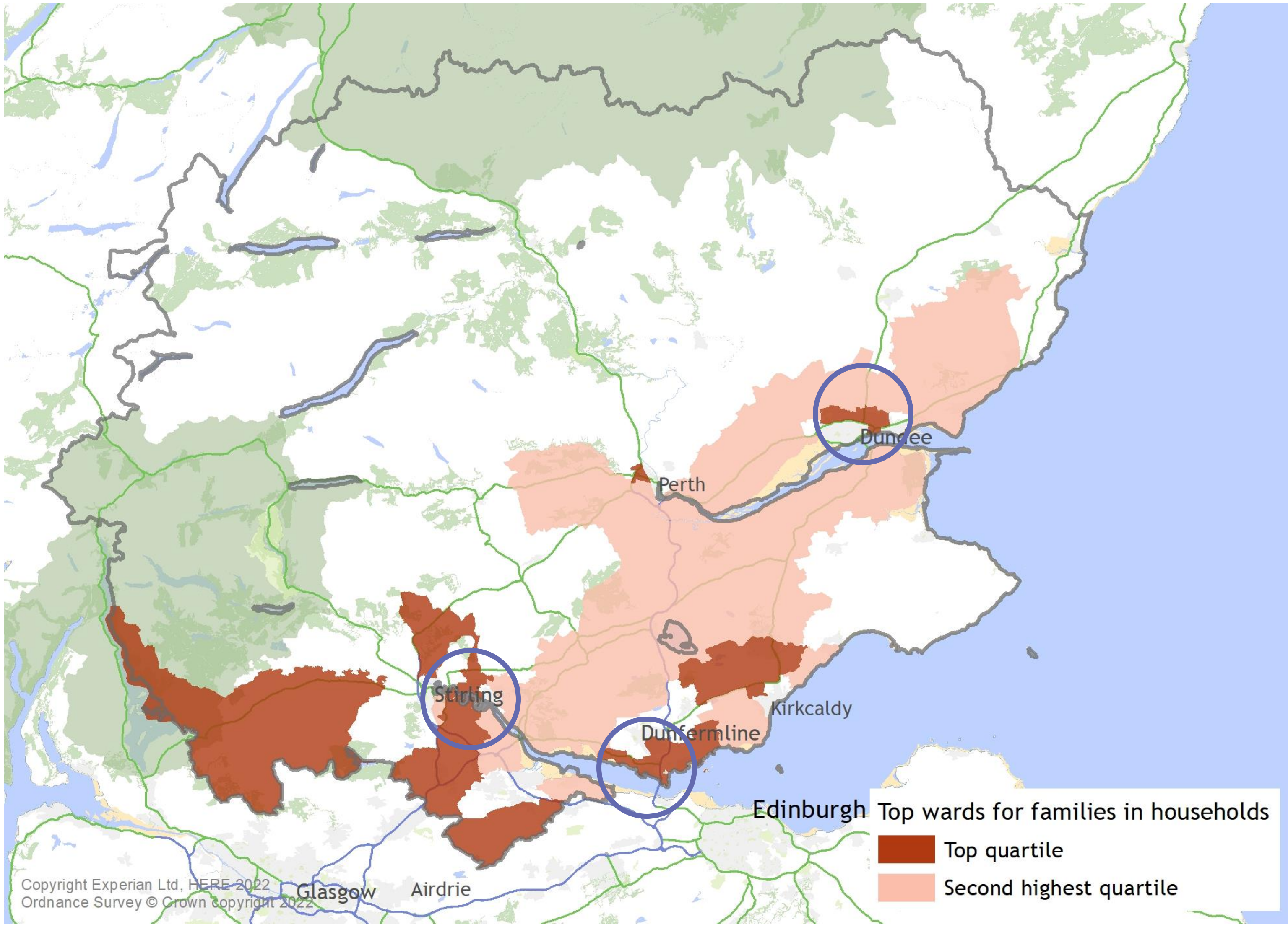
24k Clackmannanshire



Where do family groups live?

Top wards:

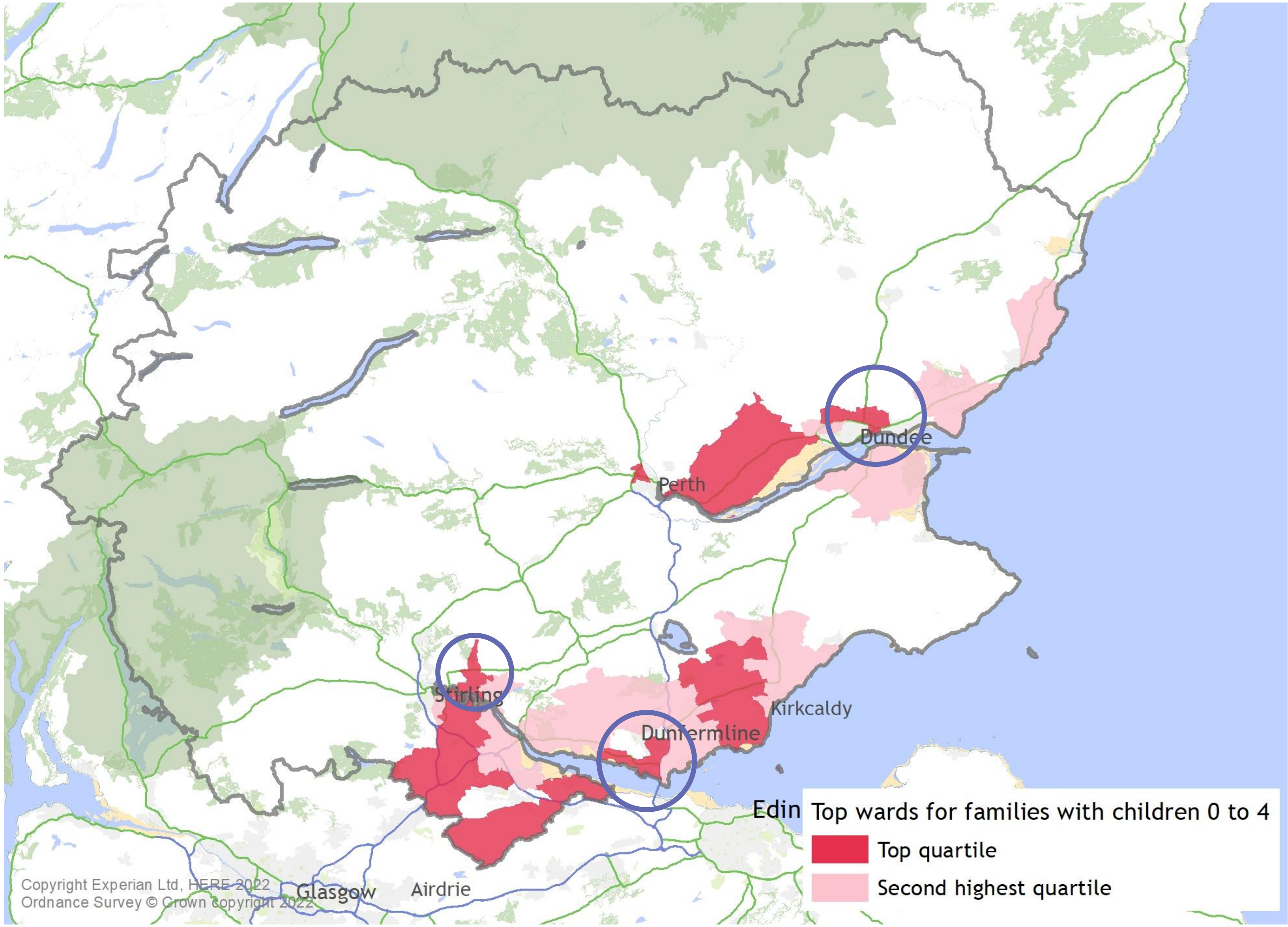
1. North East Dundee
2. Dunfermline South
3. Clackmannanshire West



Where do families with children 0 to 4 live?

Top wards:

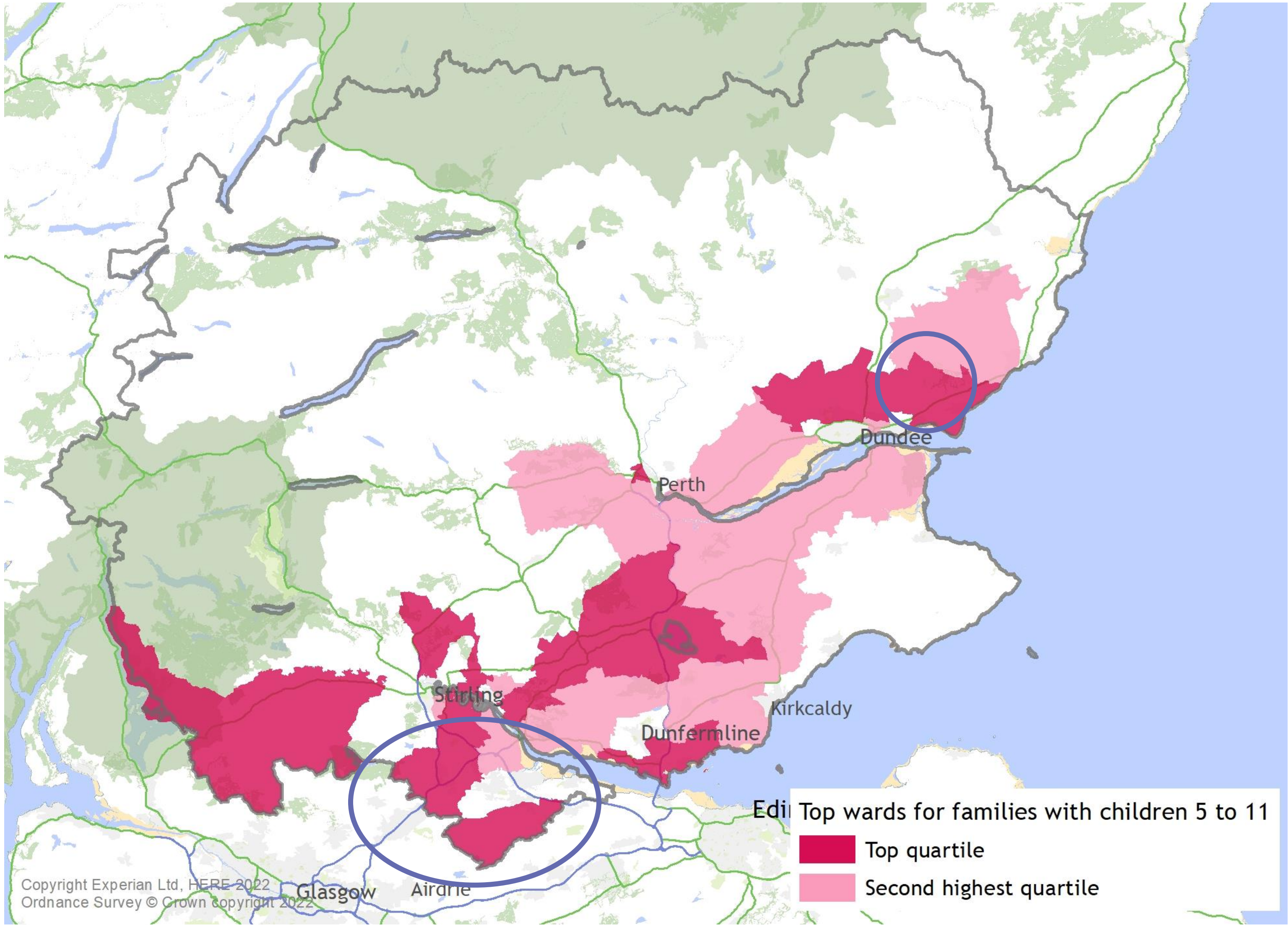
1. North East Dundee
2. Dunfermline South
3. Clackmannanshire West



Where do families with children 5 to 11 live?

Top wards:

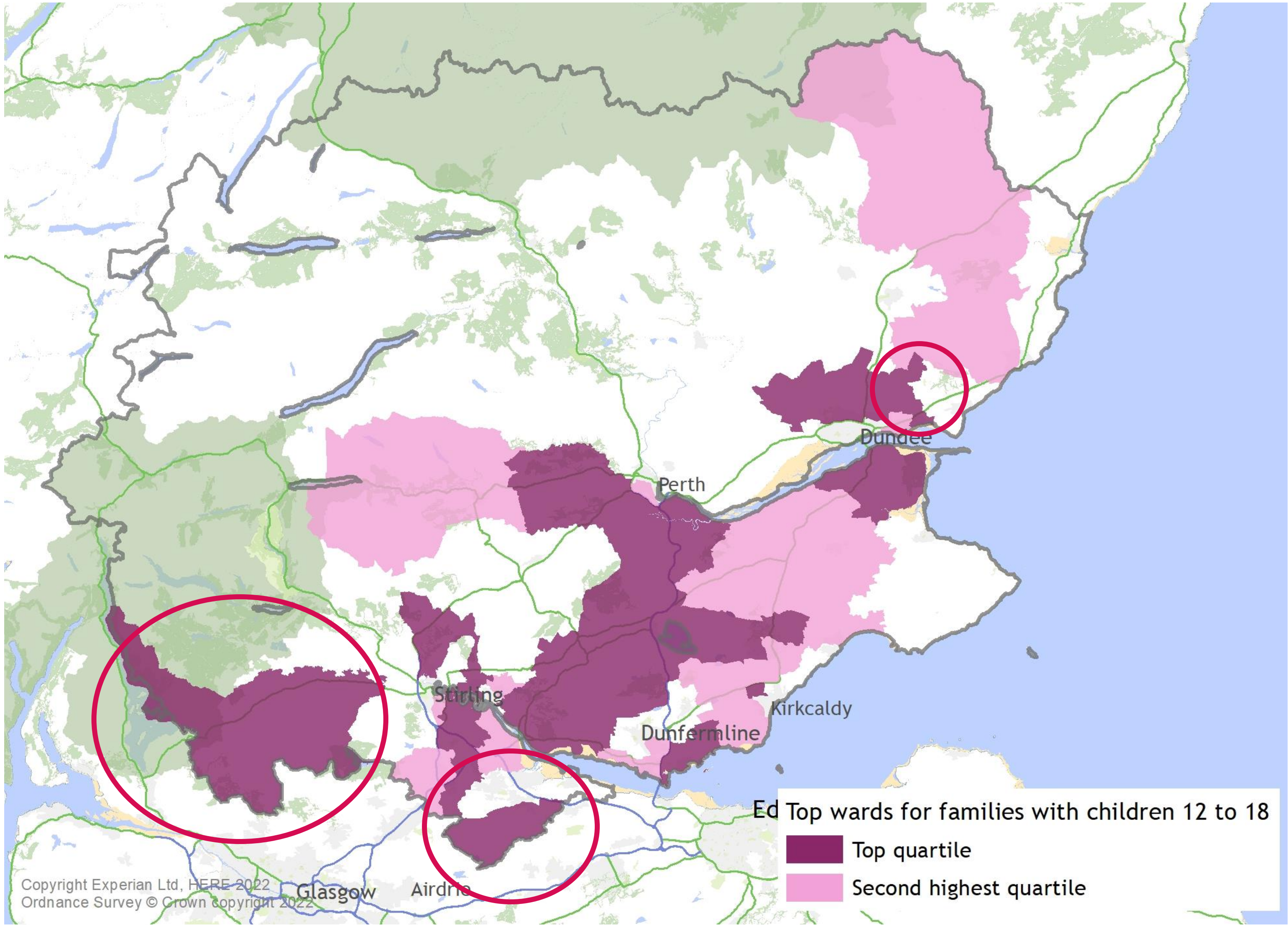
1. Bonnybridge and Larbert (West of Falkirk)
2. North East Dundee
3. Upper Braes (South of Falkirk)



Where do families with children 12 to 18 live?

Top wards:

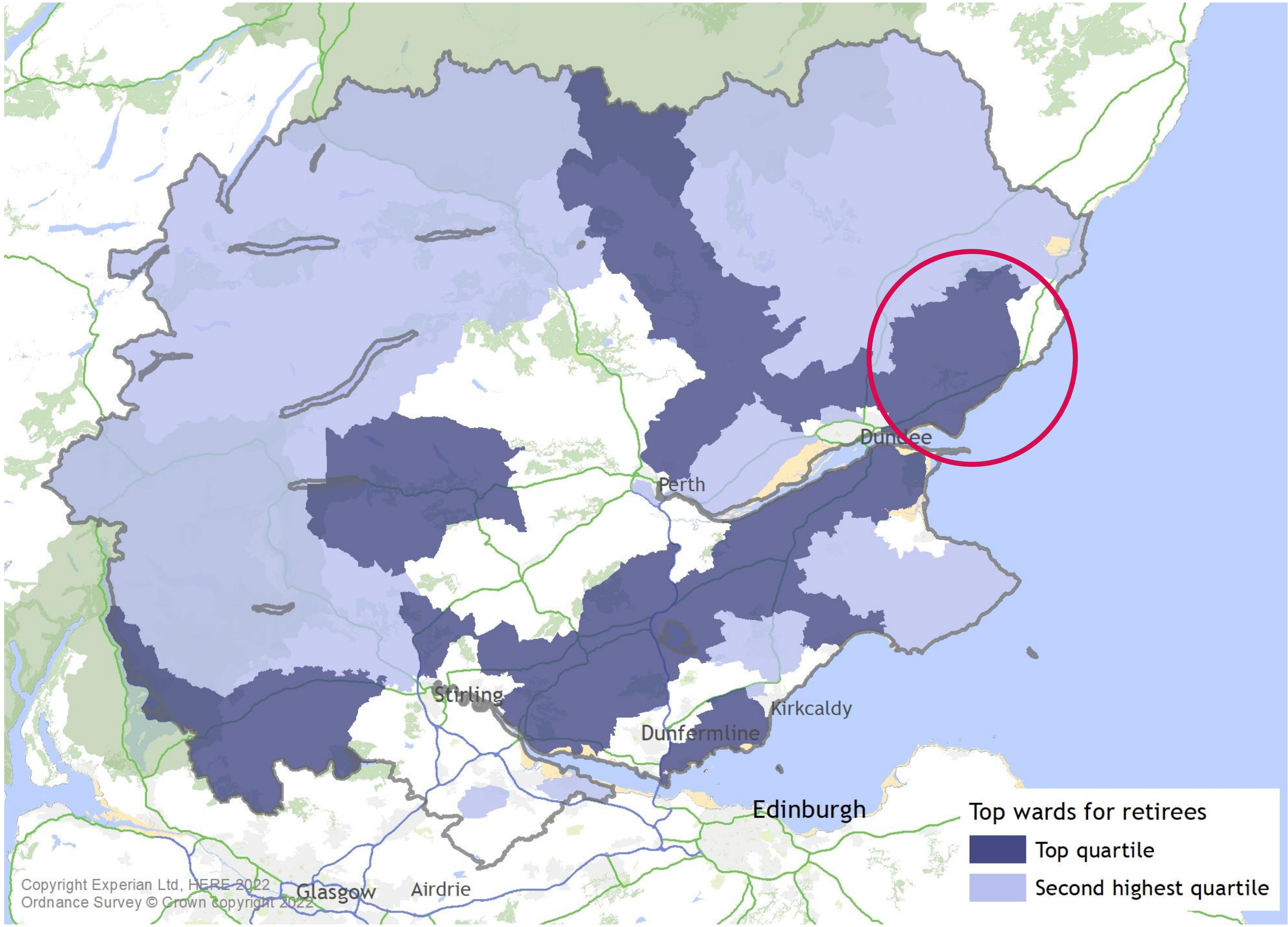
1. North East Dundee
2. Forth and Endrick (West)
3. Upper Braes (South of Falkirk)



Where do retirees live?

Top wards:

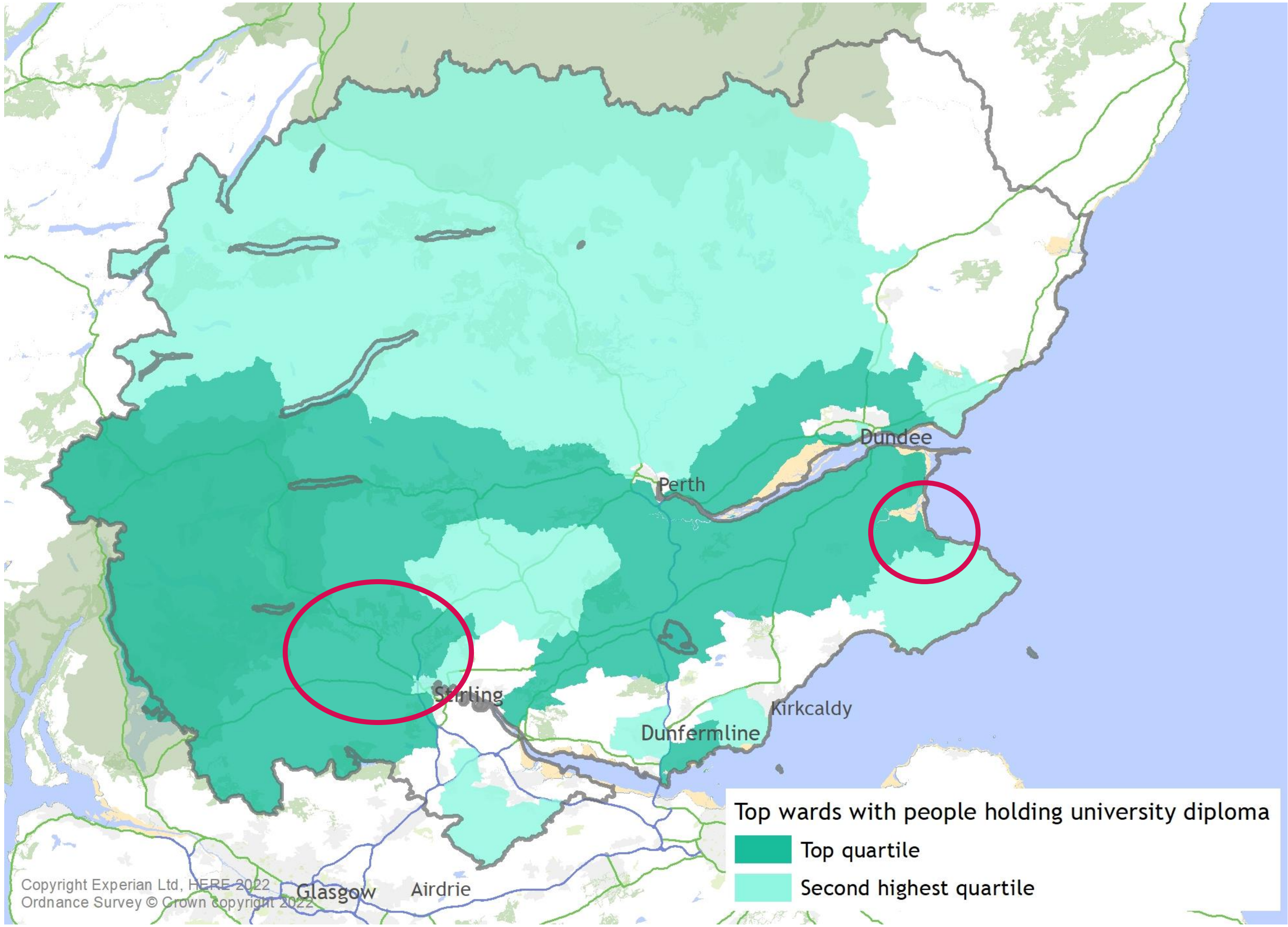
1. Monifieth and Sidlaw, Angus
2. The Ferry (East Dundee)
3. Carnoustie and District



Where do university educated groups live?

Top wards:

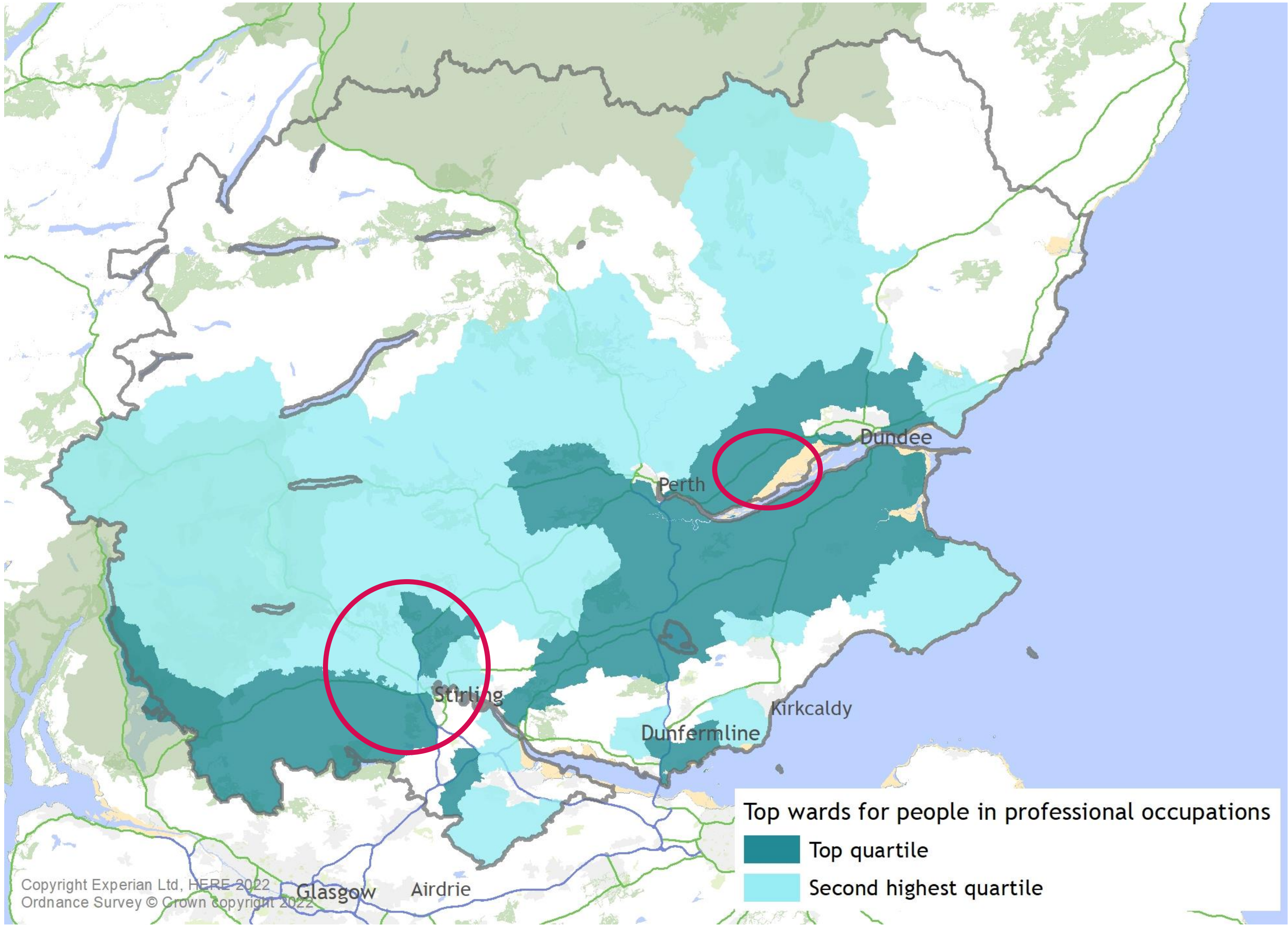
1. Dunblane and Bridge of Allan (North of Stirling)
2. St Andrews
3. Forth and Endrick (West of Stirling)



Where do groups with professional occupations live?

Top wards:

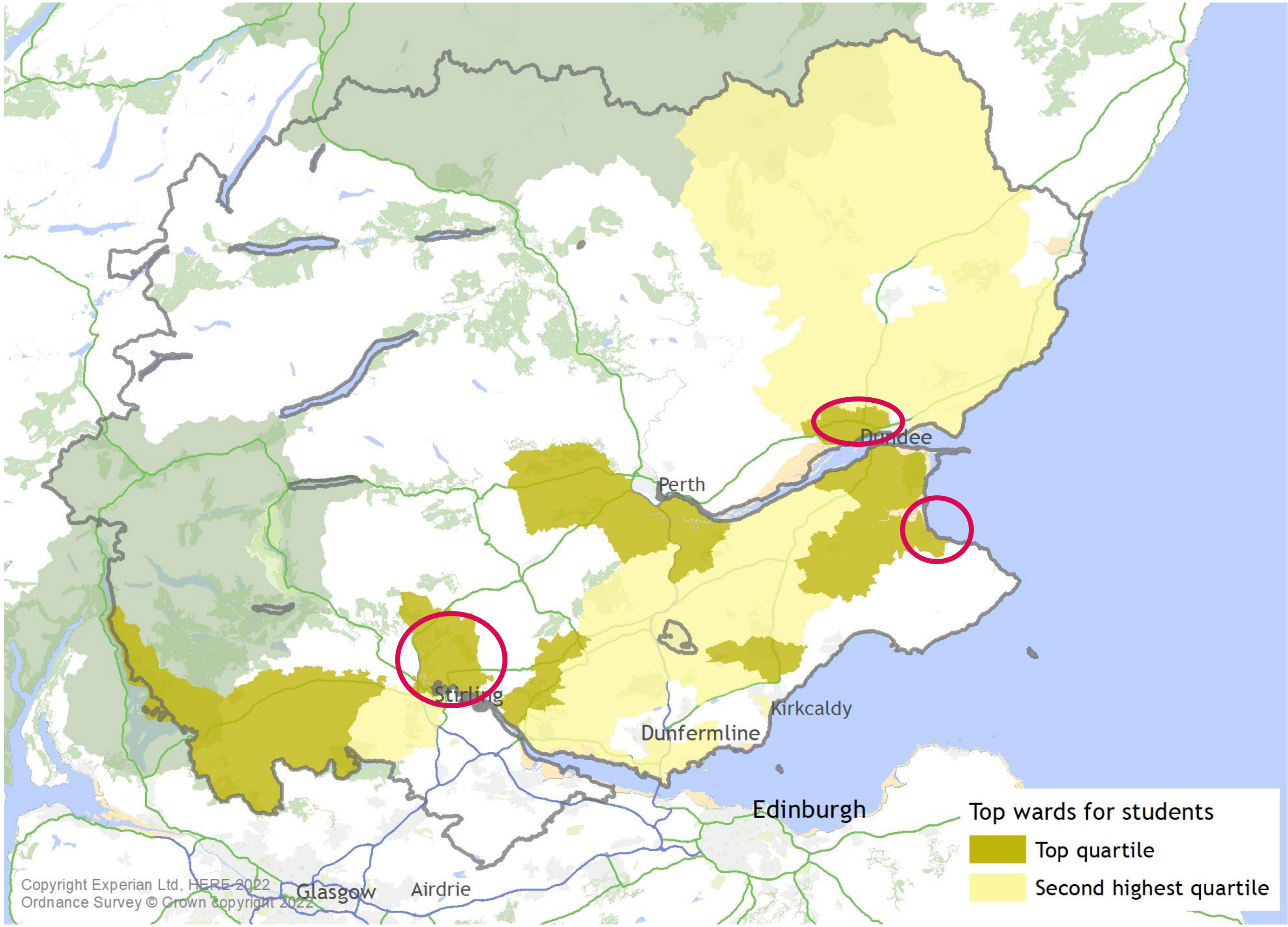
1. Dunblane and Bridge of Allan (North of Stirling)
2. Forth and Endrick (West of Stirling)
3. Carse of Gowrie (East of Perth)



Where do students live?

Top wards:

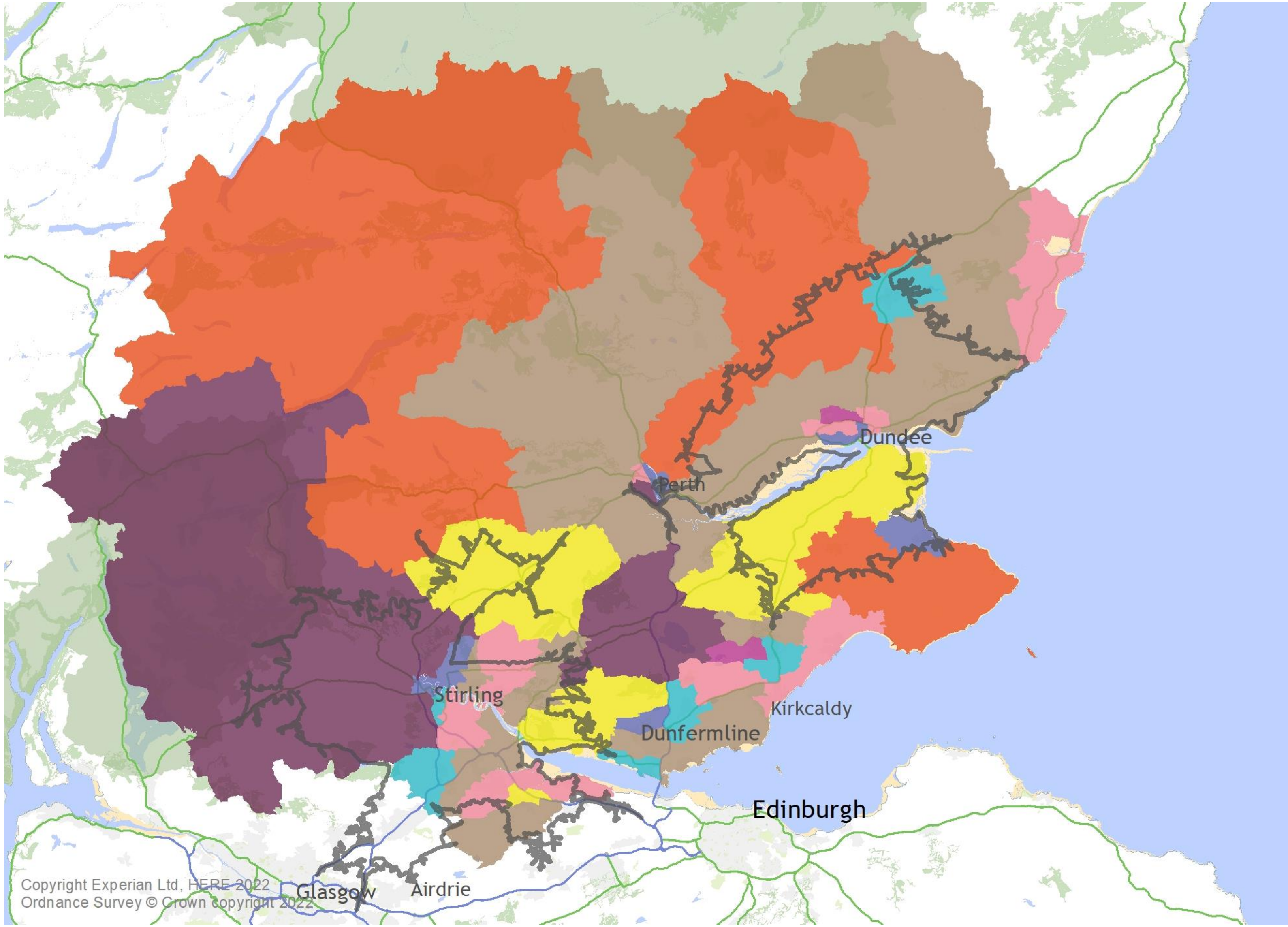
1. St Andrews
2. West End (Dundee centre)
3. Stirling North



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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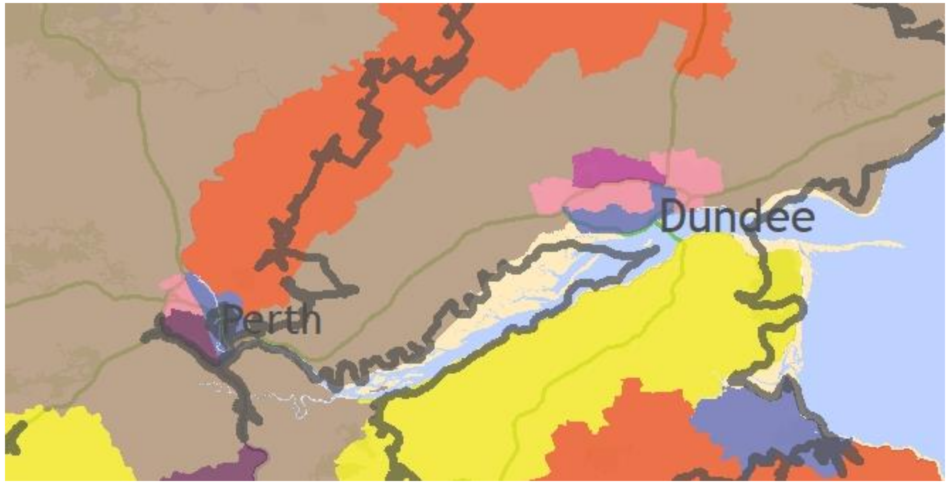

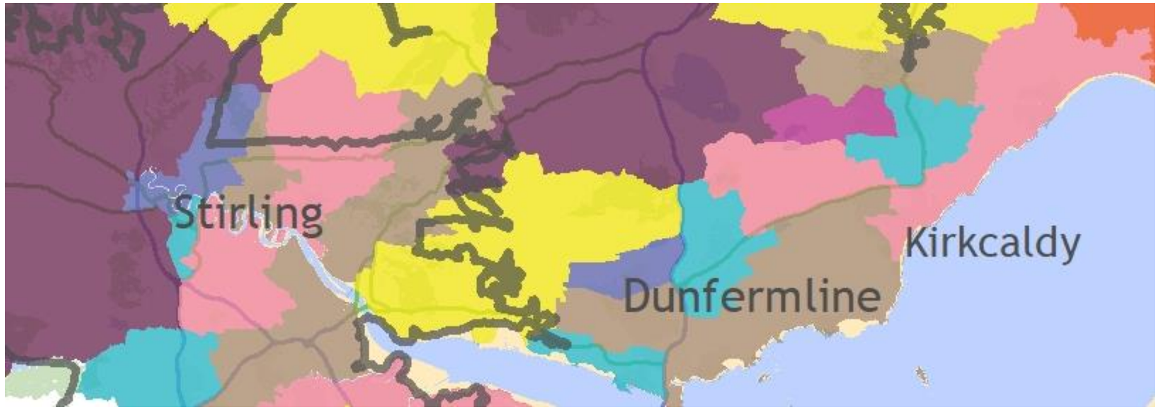

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Wards with Highest % by Audience Spectrum

Segment	Highest	Second Highest	Third Highest
Metroculturals	St Andrews (4%)	Stirling West (2%)	Dunblane and Bridge of Allan (1%)
Commuterland Culturebuffs	Dunblane and Bridge of Allan (49%)	Forth and Endrick (46%)	Stirling West (31%)
Experience Seekers	West End (62%)	Maryfield (45%)	St Andrews (41%)
Dormitory Dependables	Monifieth and Sidlaw (37%)	Upper Braes (32%)	Carse of Gowrie (32%)
Trips & Treats	Strathallan (26%)	Trossachs and Teith (25%)	Howe of Fife and Tay Coast (24%)
Home & Heritage	Highland (29%)	East Neuk and Landward (27%)	Strathearn (26%)
Up Our Street	Rosyth (38%)	Grangemouth (27%)	Glenrothes Central and Thornton (27%)
Frontline Families	Glenrothes West and Kinglassie (24%)	Strathmartine (23%)	North East (22%)
Kaleidoscope Creativity	Lochgelly, Cardenden and Benarty (43%)	Falkirk North (40%)	Kirkcaldy East (37%)
Supported Communities	East End (27%)	Coldside (22%)	Strathmartine (19%)

Who is the Local Audience?

About Local Audiences

Audience Finder ticketing:

Local **Venues** Included:

Dundee Contemporary Arts
Dundee Rep Theatre
(V&A Dundee)
ONFife
Horsecross Arts
Pitlochry Festival Theatre
Macrobert Arts Centre

Central Scotland

	16-17	19-20	Increase
Bookers	66,070	70,795	4,725
Bookings	154,313	162,453	8,140
Tickets	404,437	416,403	11,966
Income	£8,681,784	£9,594,876	913,091

Scotland

	16-17	19-20	Change
Bookers	293,731	297,526	3,795
Bookings	684,906	691,034	6,128
Tickets	1,692,794	1,689,621	- 3,173
Income	£32,197,187	£33,886,159	1,688,972

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Profile of Local Audiences

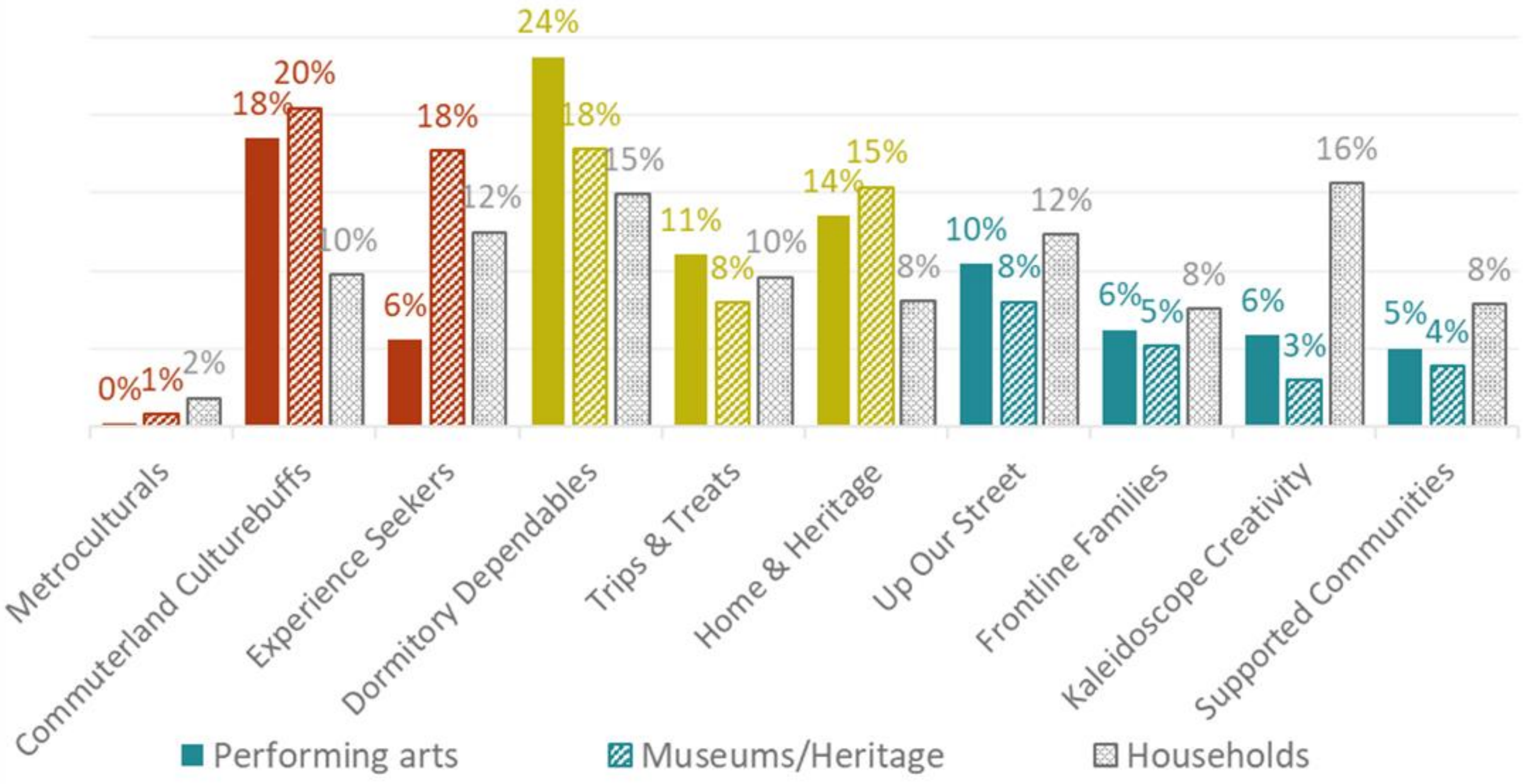
Key differences by artform:

Film – ES = 15%

Children/Family shows – FF = 10%

Dance – DD = 27%

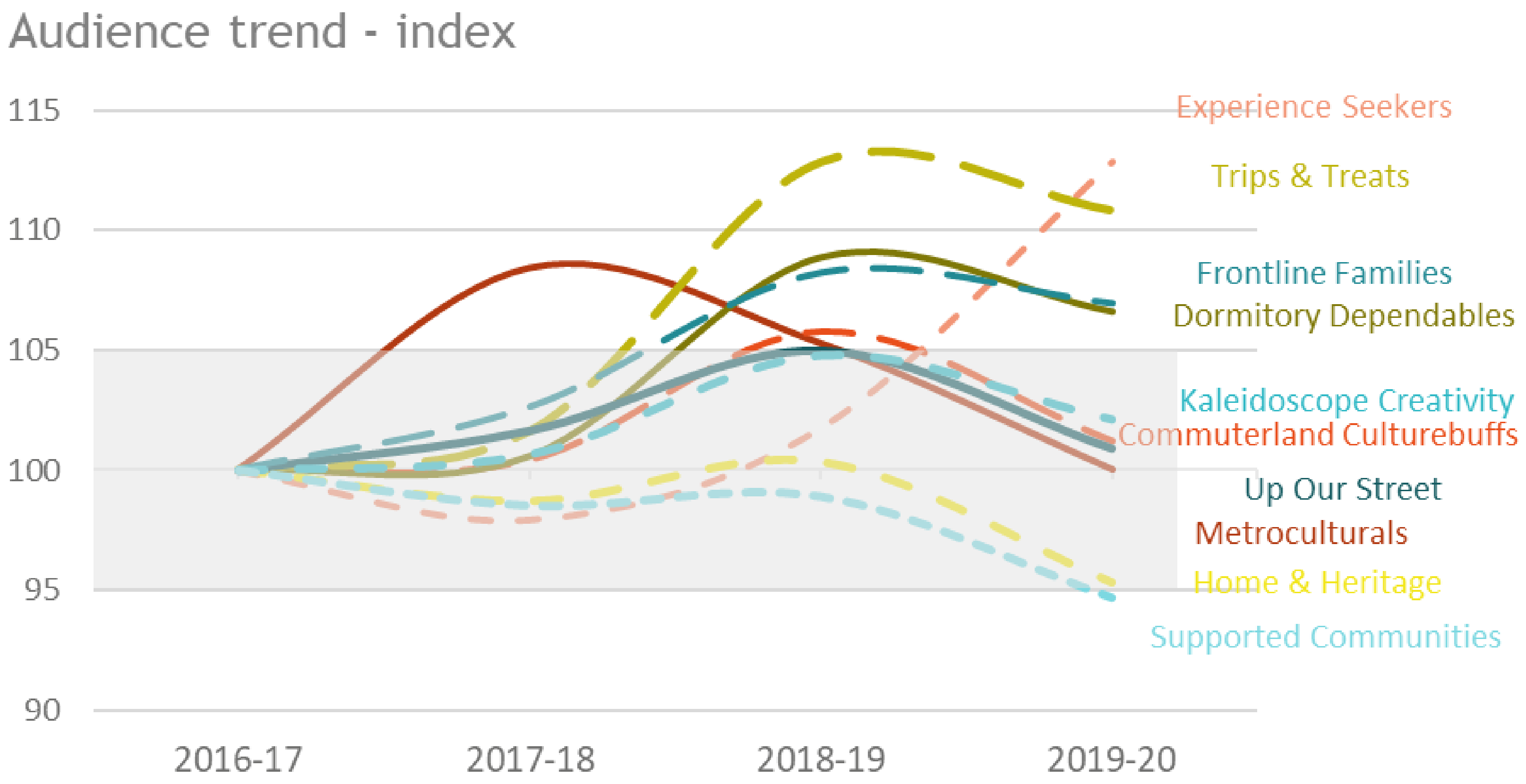
Music – UOS = 11%



Audience Trends

Families Lower/Middle Income

Older / Lower income



Dominant Audience Spectrum Segment by Ward - Population

Dominant segment in households

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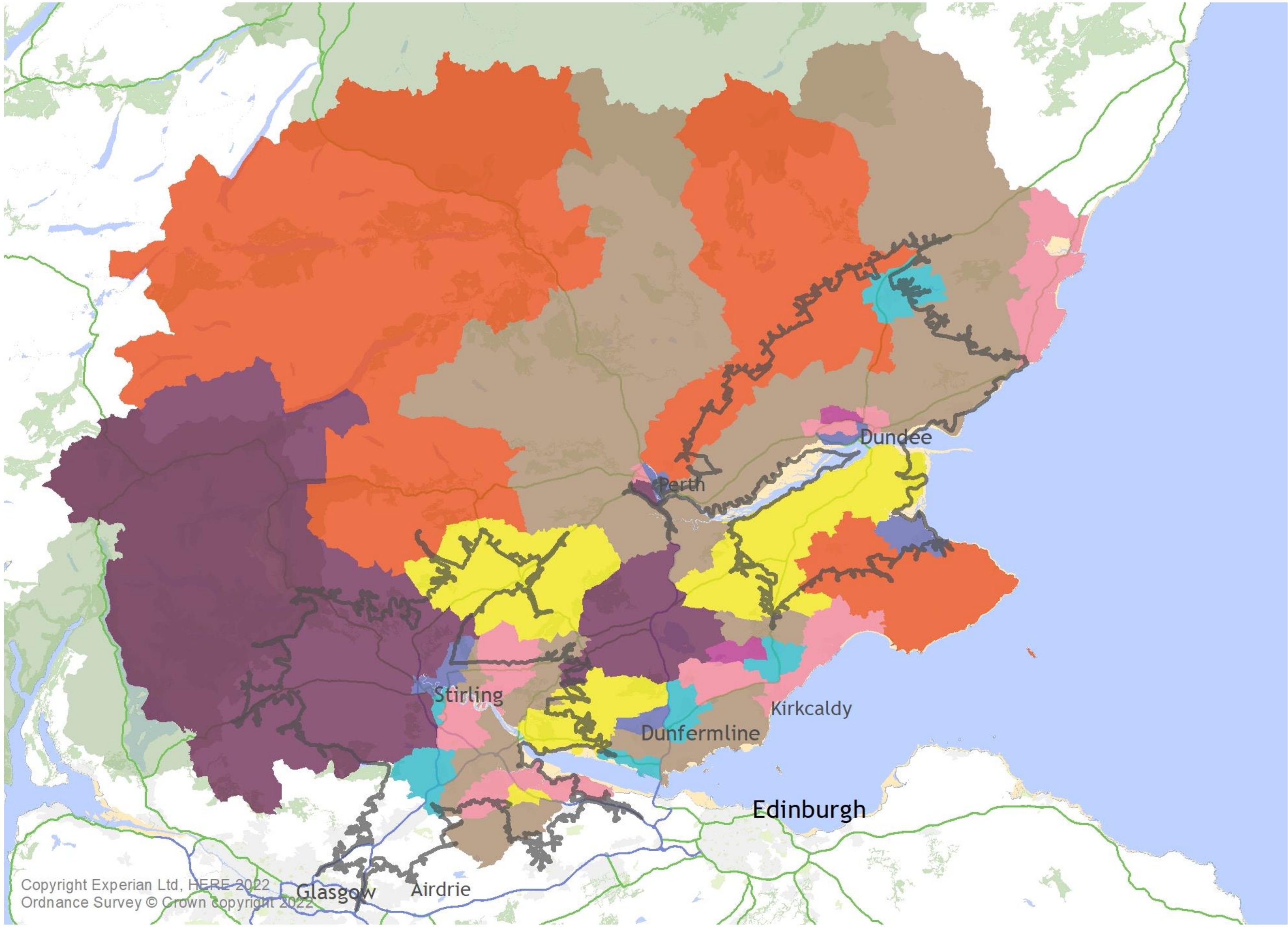

Dominant Audience Spectrum Segment by Ward - Bookers

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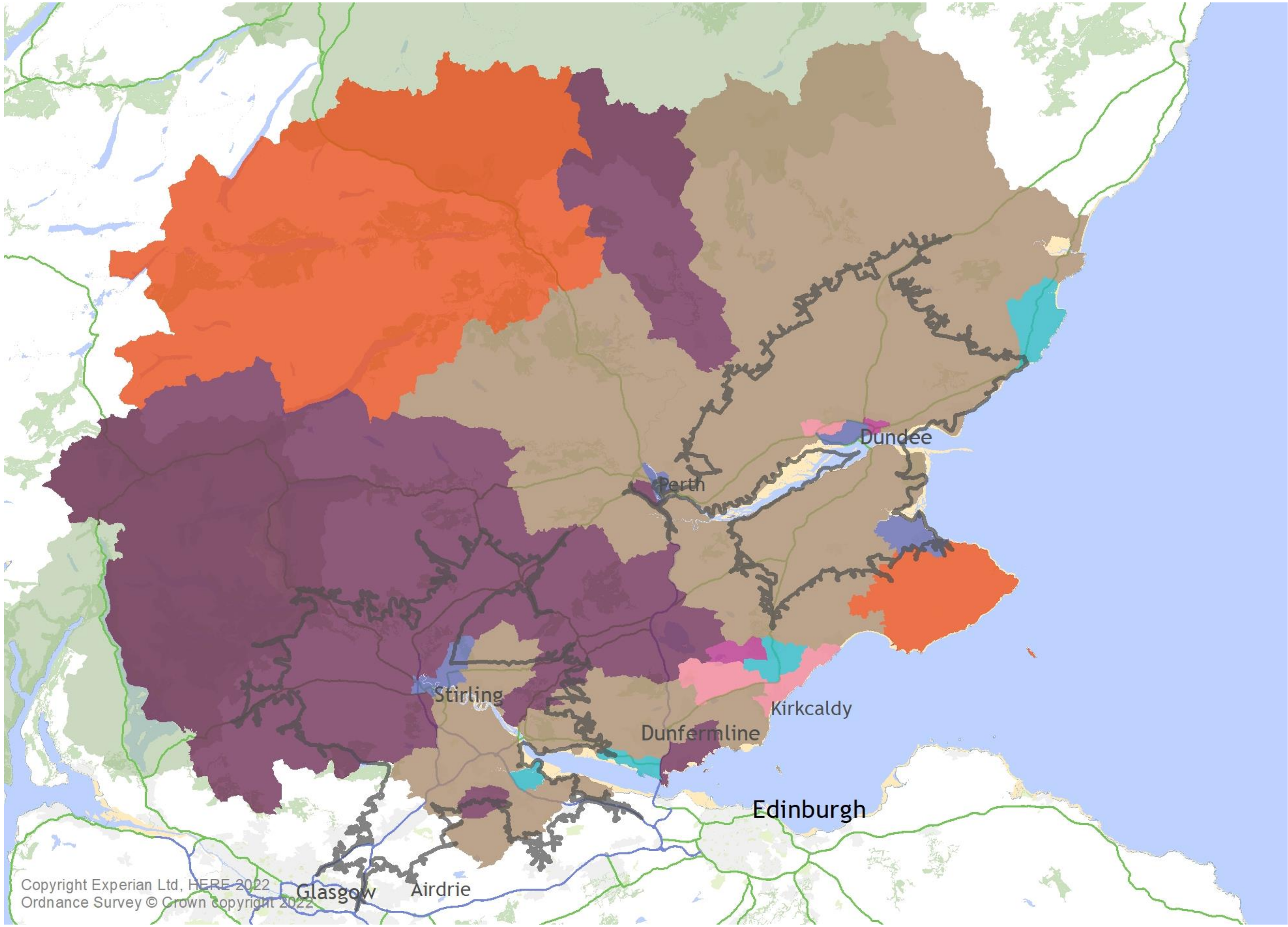

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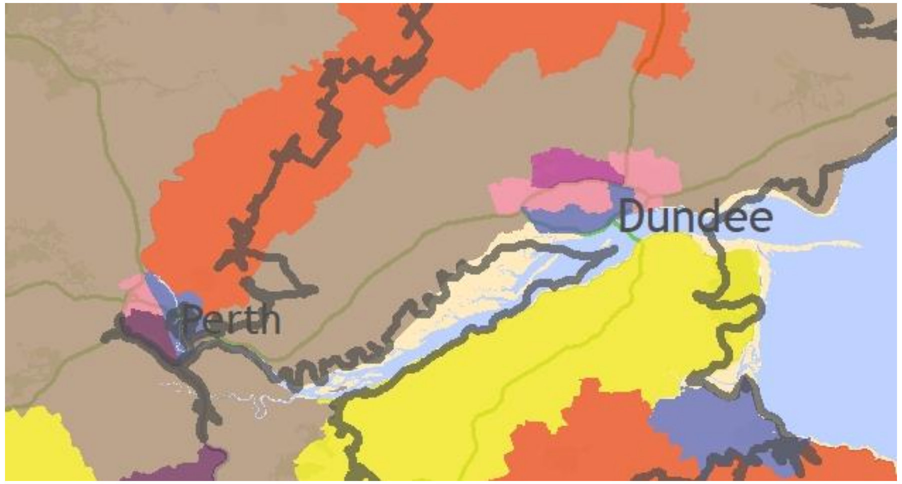

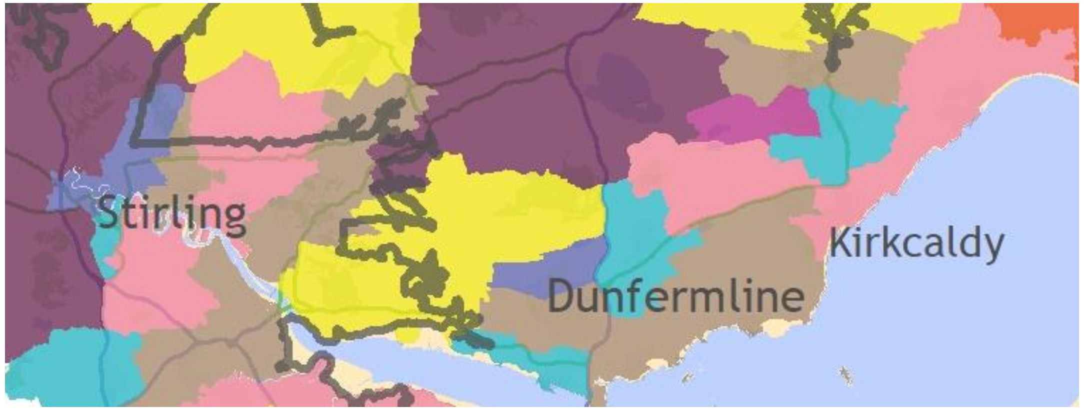

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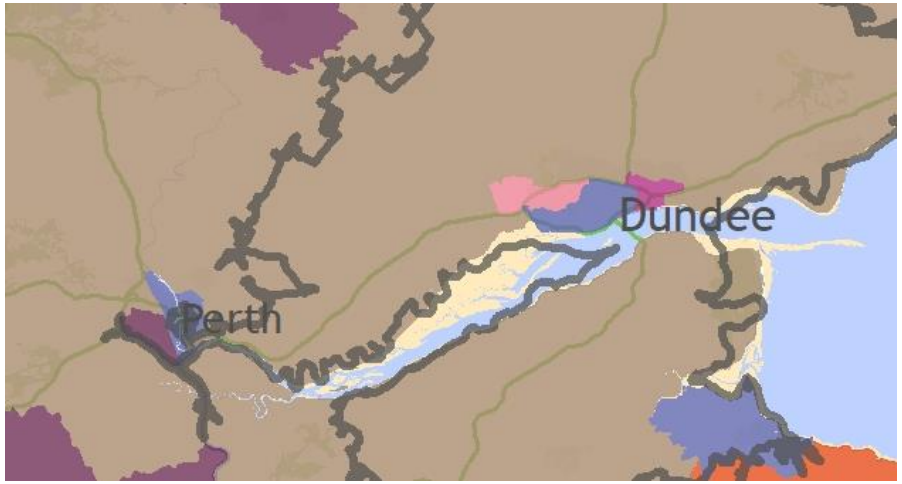

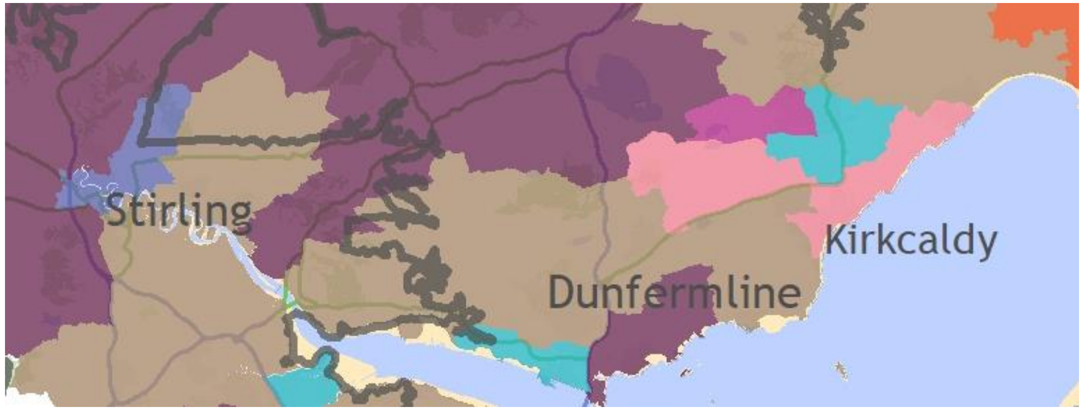

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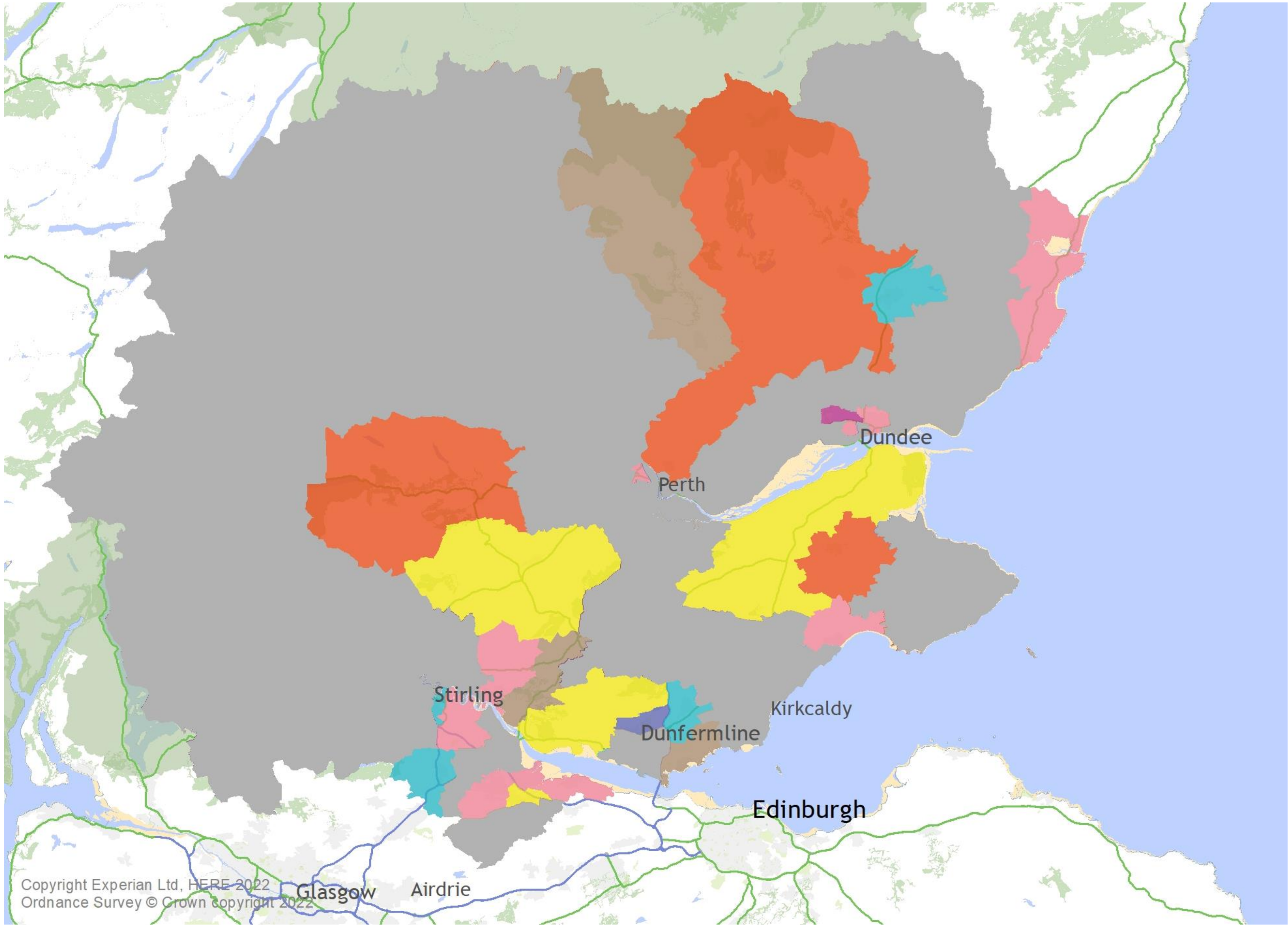

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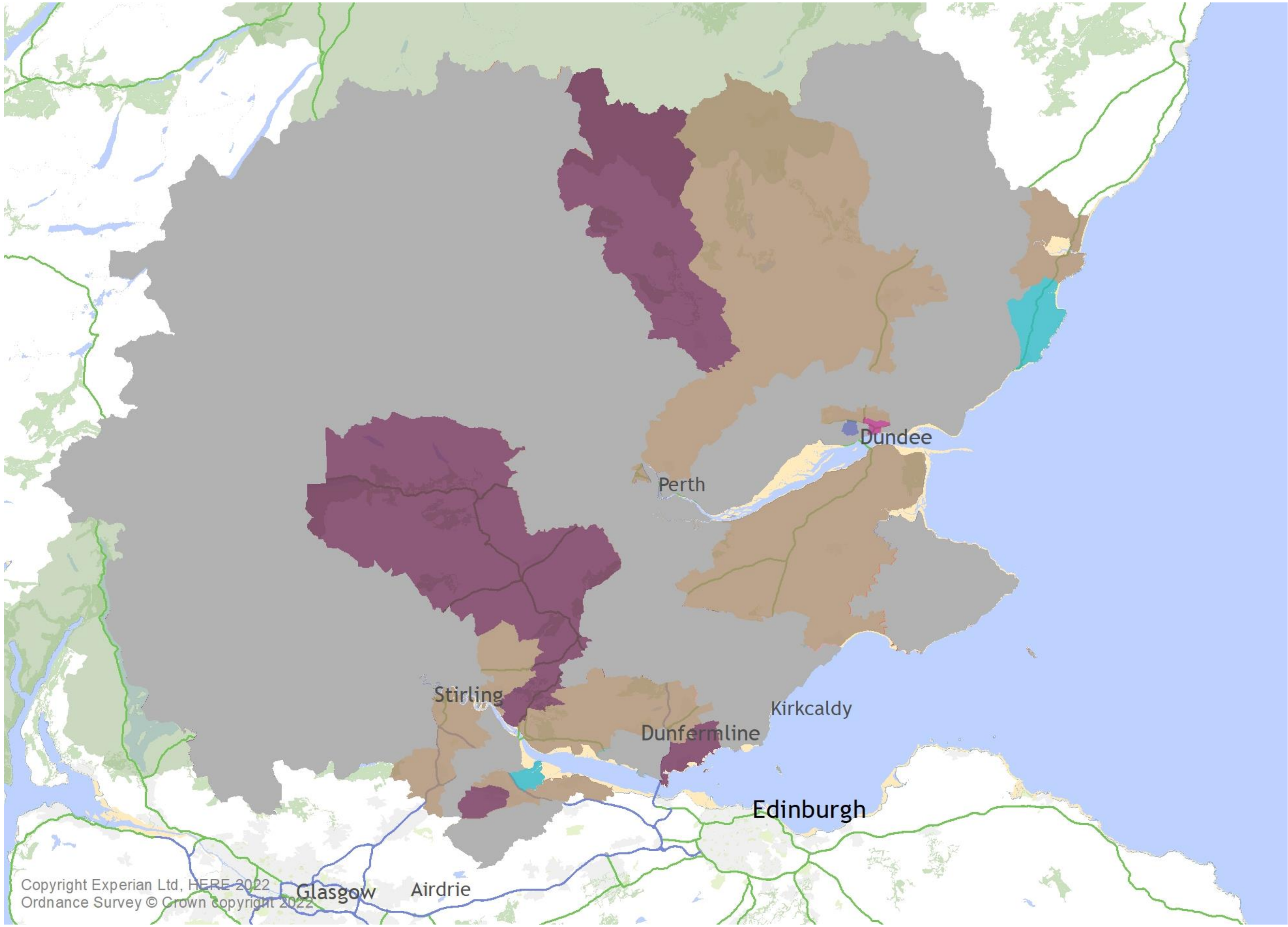

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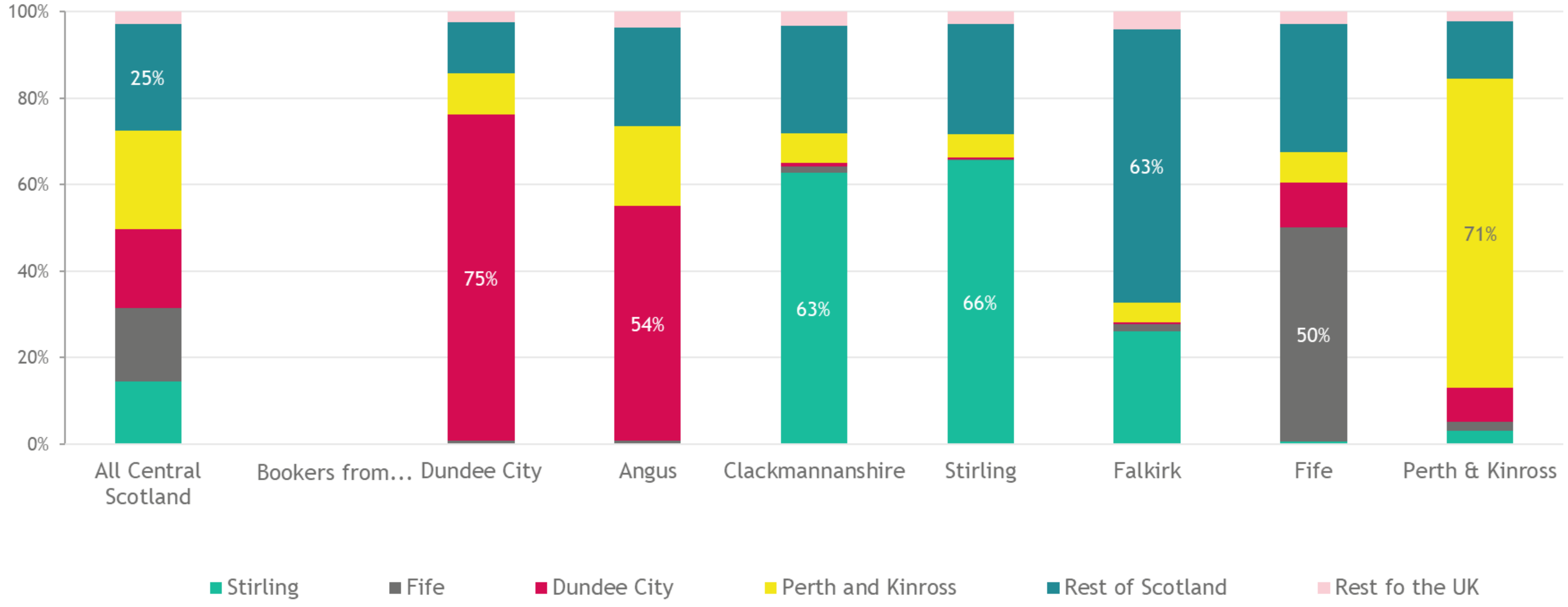
Where are Local Audiences Attending?

Local/Non-Local Audiences

Bookers are staying largely local to their nearest town/city, Falkirk bookers are going to Edinburgh



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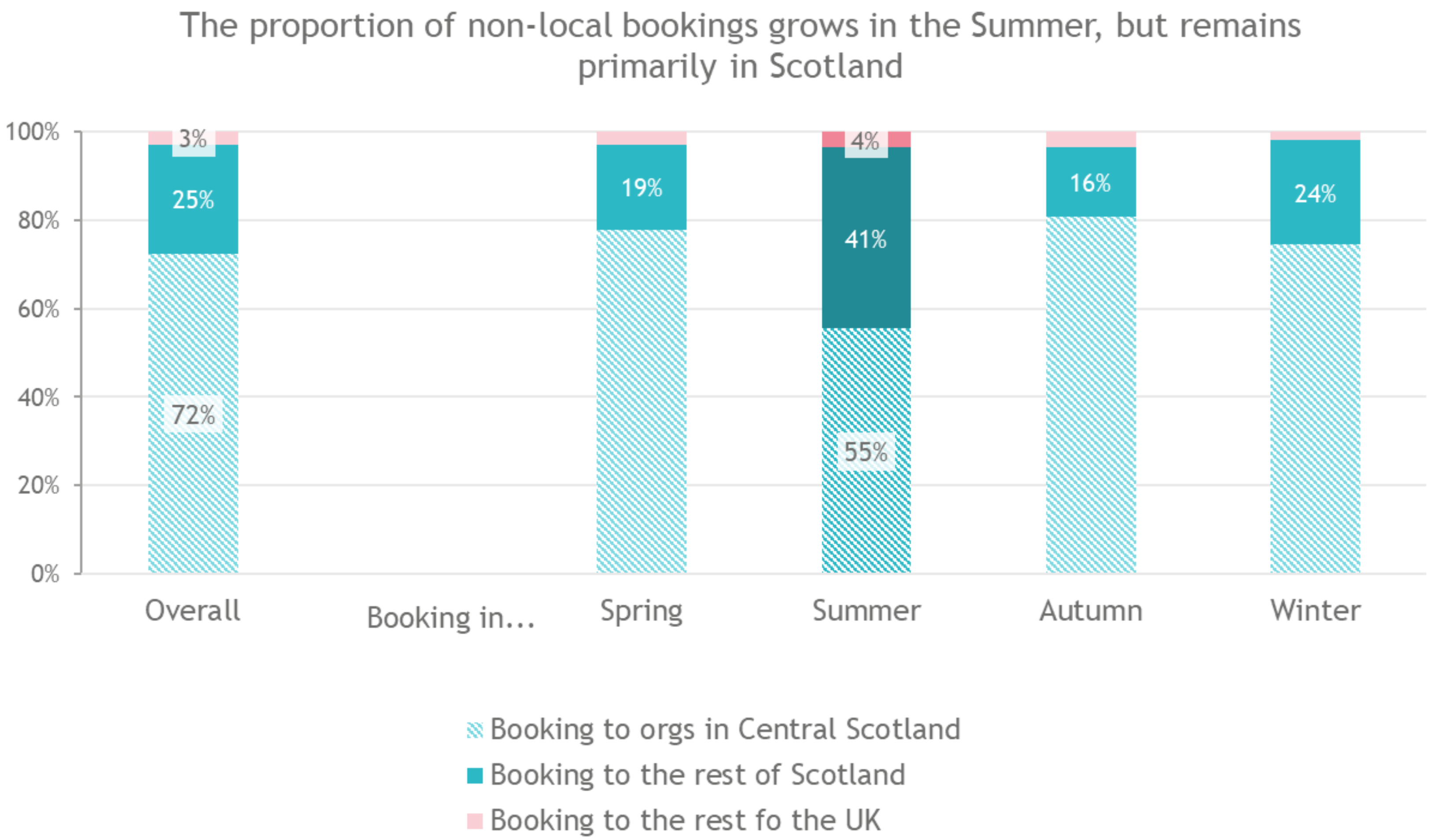
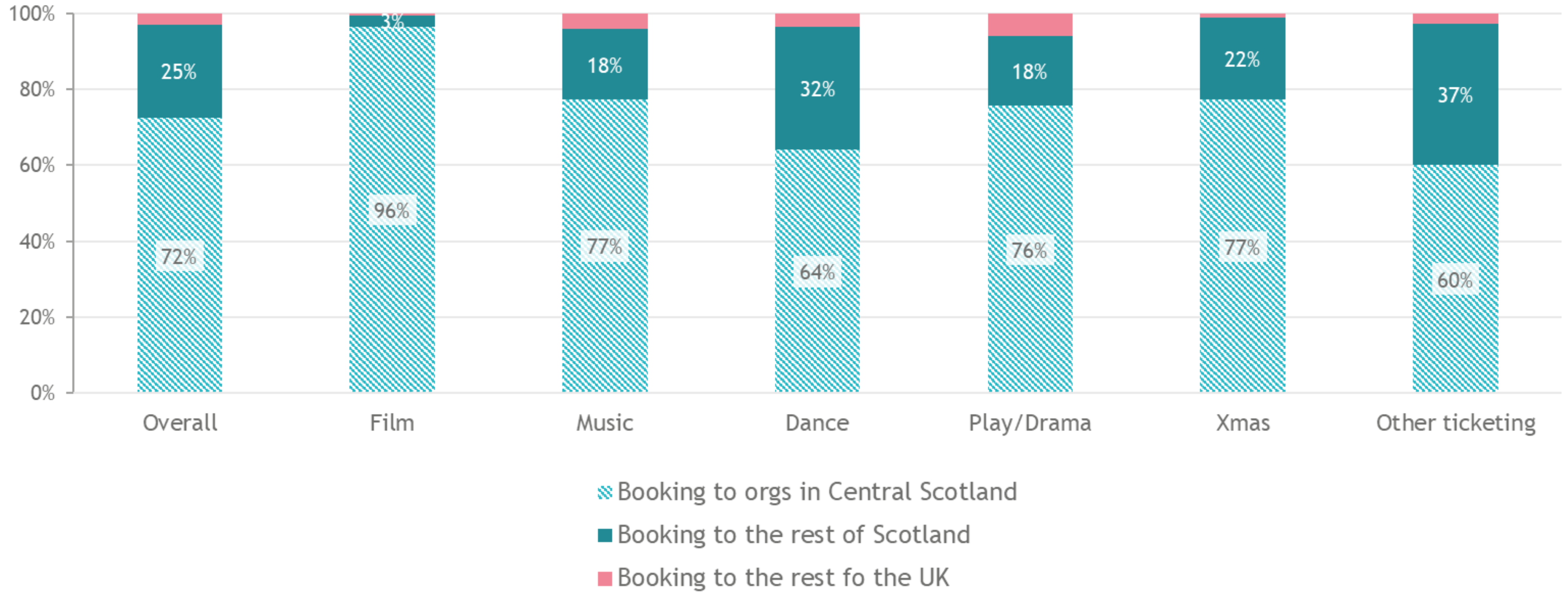
Local/Non-Local Audiences



Local/Non-Local Audiences

For Film, Central Scotland bookers tend to visits almost exclusively local venues, for Dance, they book to venues out of the local area over a third of the time



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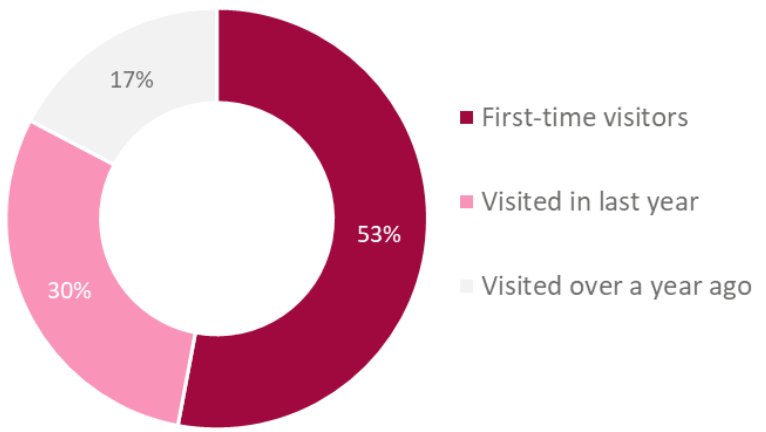
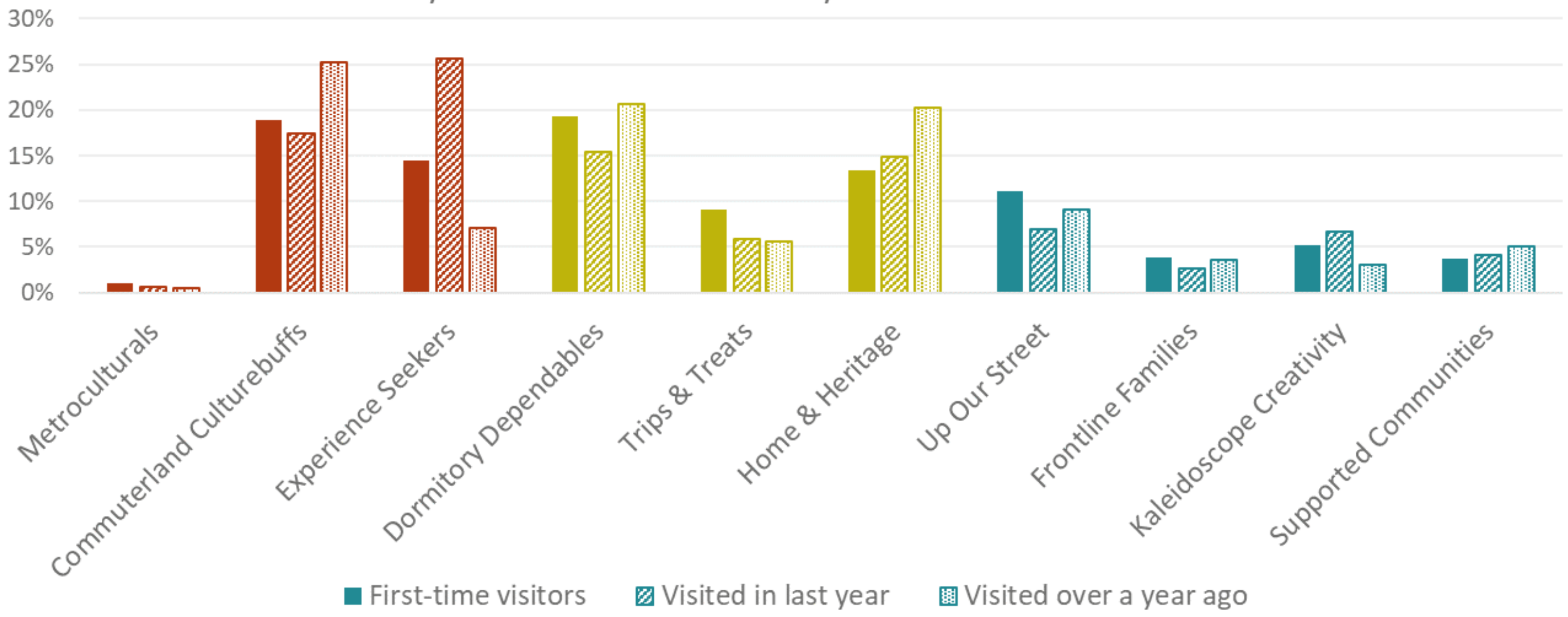
Visiting Patterns

From Audience Finder surveys

Half of visitors from Central were first-time visitors



HH and CC were more likely to be repeat visitors from over a year ago, ES were most likely to have visited in the last year



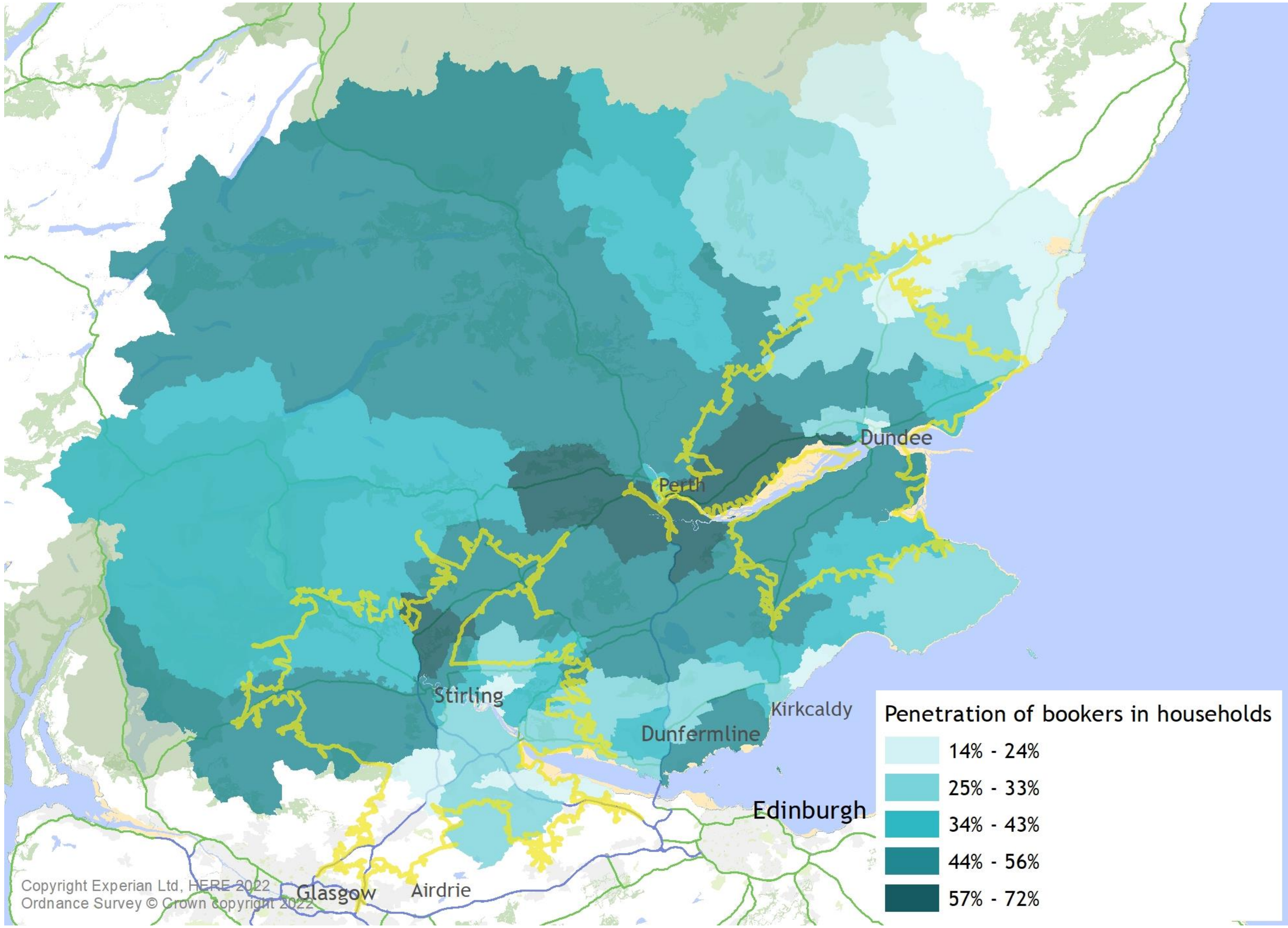
Visiting Patterns

From Audience Finder surveys

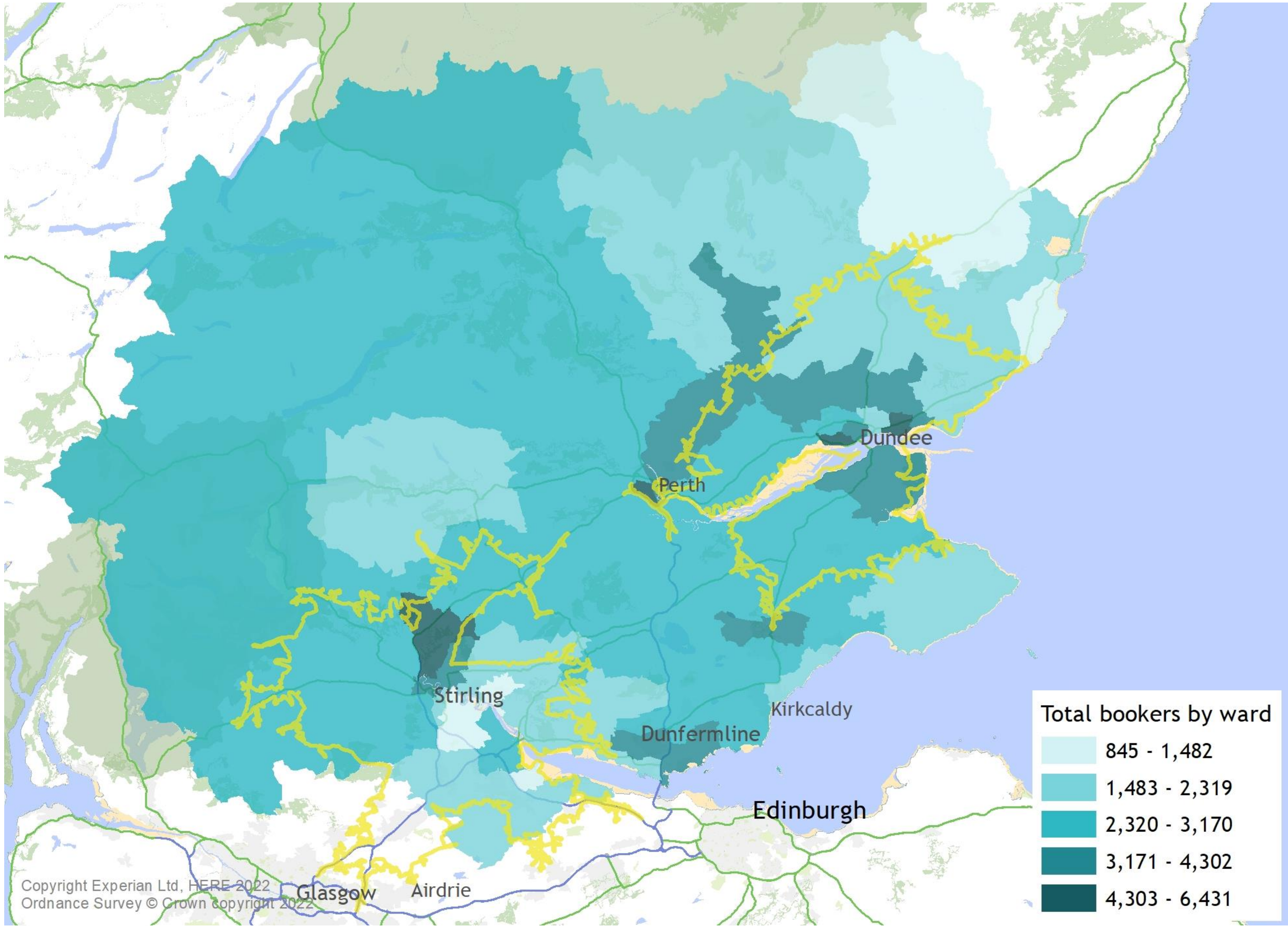
	Visitors from Central Scotland
First-time visitors	53%
Visited in last year	30%
Visited over a year ago	17%

AS	First-time visitors	Visited in last year	Visited over a year ago
Metrocultural s	1%	1%	1%
Commuterland Culturebuffs	19%	17%	25%
Experience Seekers	14%	26%	7%
Dormitory Dependables	19%	15%	21%
Trips & Treats	9%	6%	6%
Home & Heritage	13%	15%	20%
Up Our Street	11%	7%	9%
Frontline Families	4%	3%	4%
Kaleidoscope Creativity	5%	7%	3%
Supported Communities	4%	4%	5%

Audience Concentrations – Household Penetration



Audience Concentrations – Booker Count



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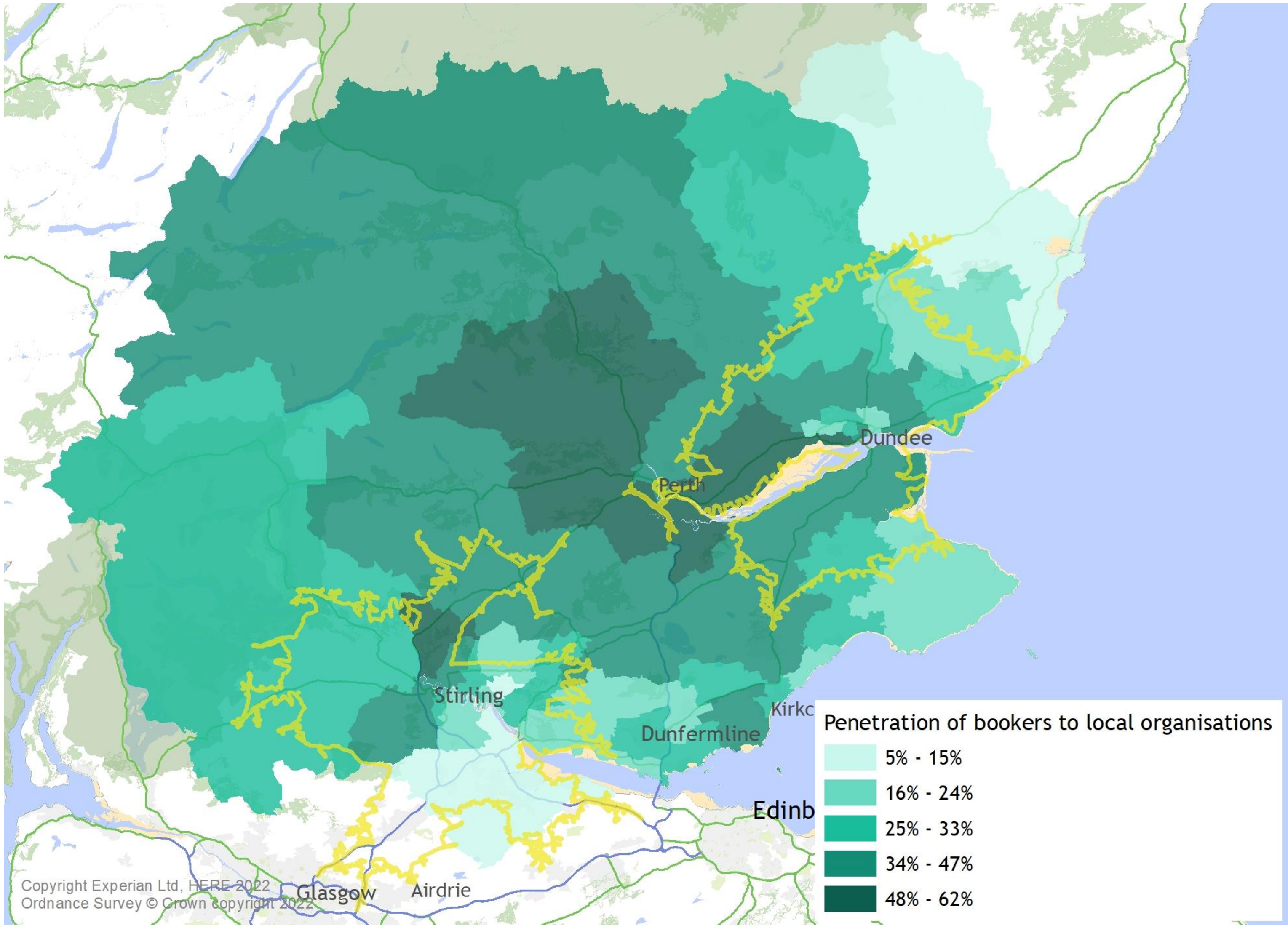
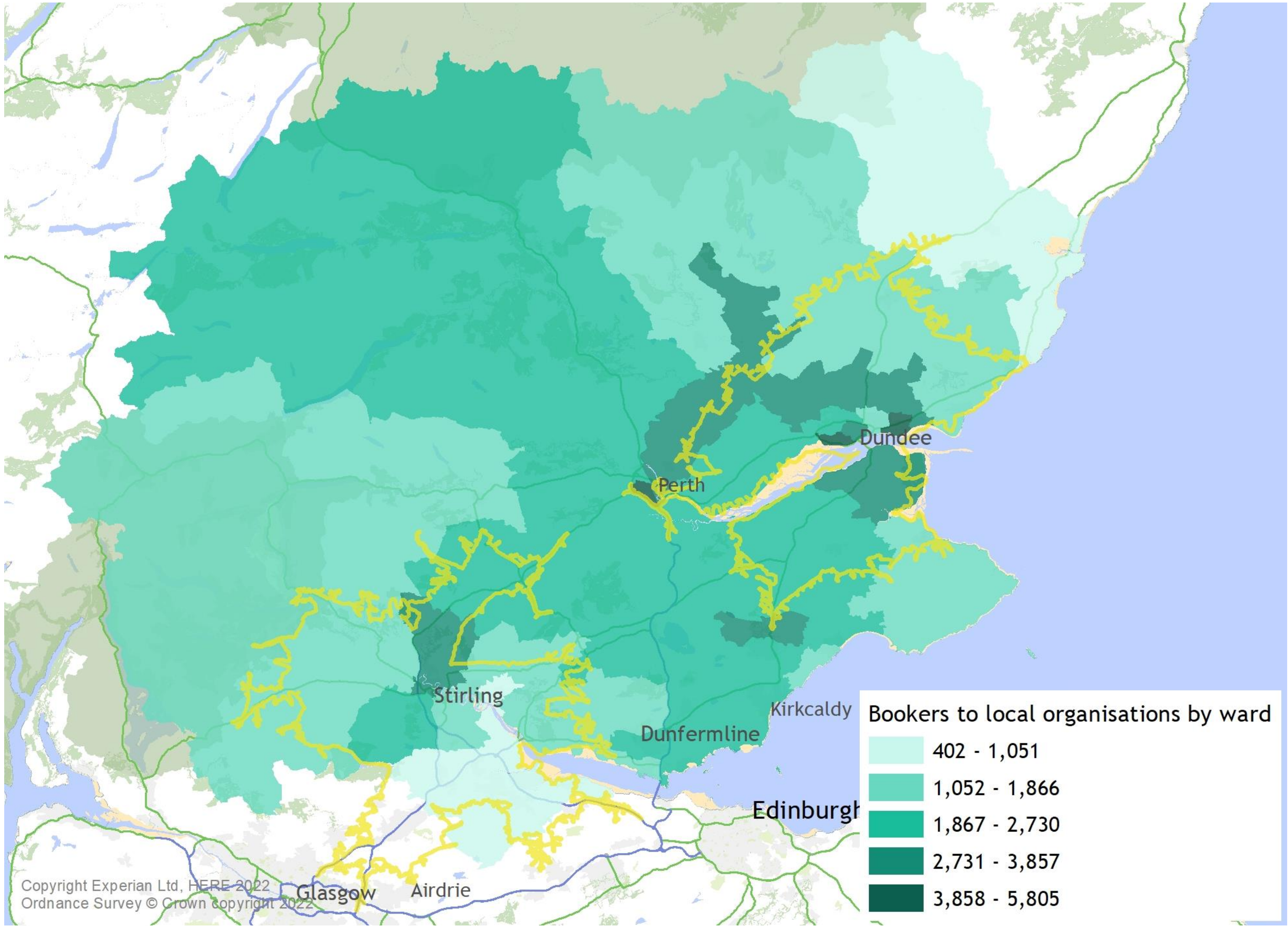
Audience Concentrations – Local organisations penetration



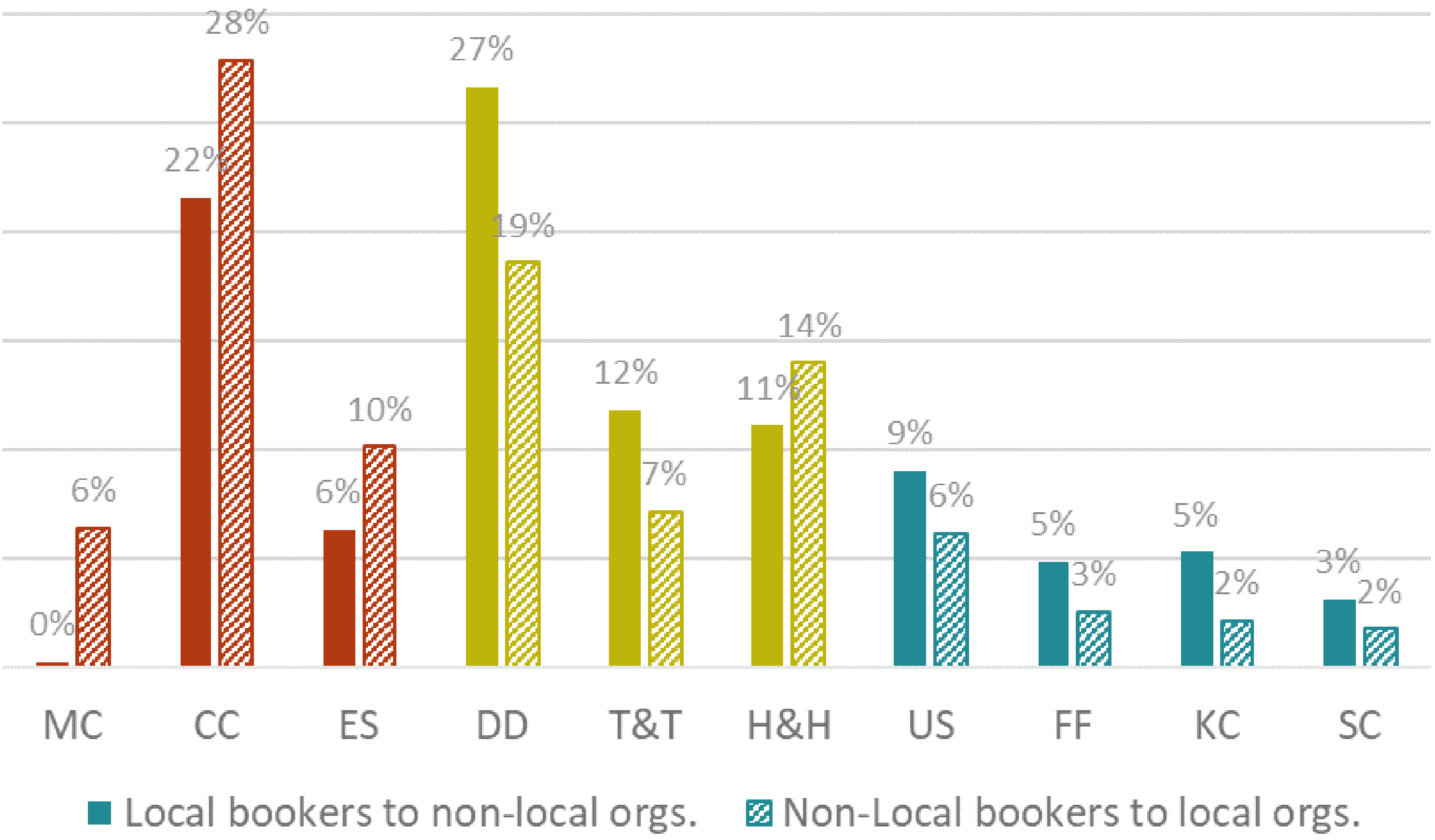
Audience Concentrations – Local organisations booker count



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

Non-Local Audiences

AS profile of non-local audience to local orgs Monthly breakdown of non-local audience to local orgs

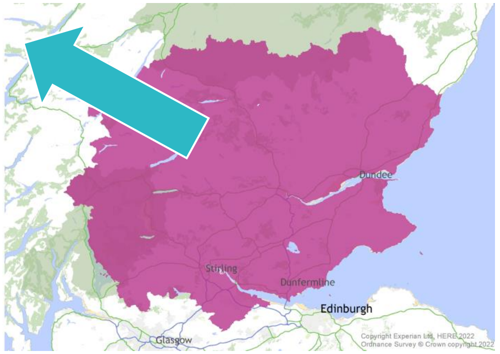


Non-Local Audiences

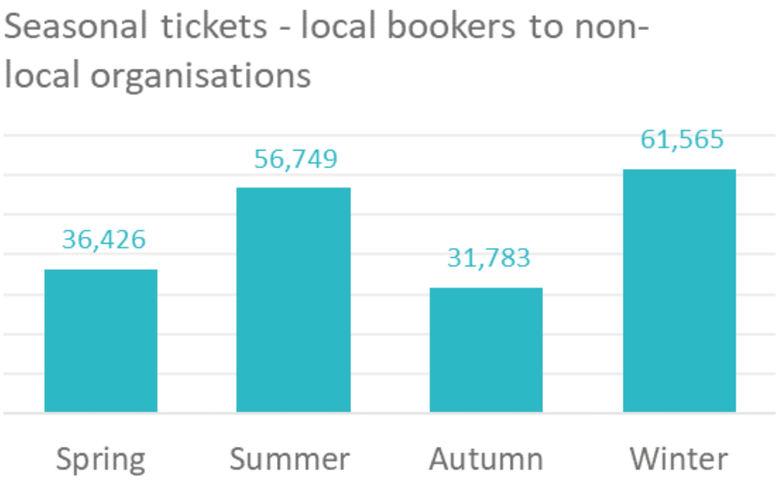
	Local bookers to non-local orgs.	Non-Local bookers to local orgs.
Metroculturals	0%	6%
Commuterland Culturebuffs	22%	28%
Experience Seekers	6%	10%
Dormitory Dependables	27%	19%
Trips & Treats	12%	7%
Home & Heritage	11%	14%
Up Our Street	9%	6%
Frontline Families	5%	3%
Kaleidoscope Creativity	5%	2%
Supported Communities	3%	2%

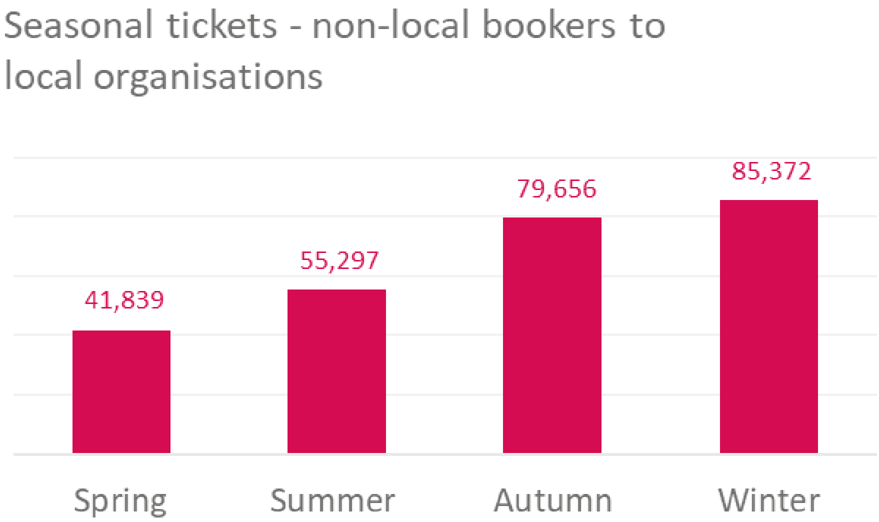
Non-Local Audiences – volume of tickets

186k



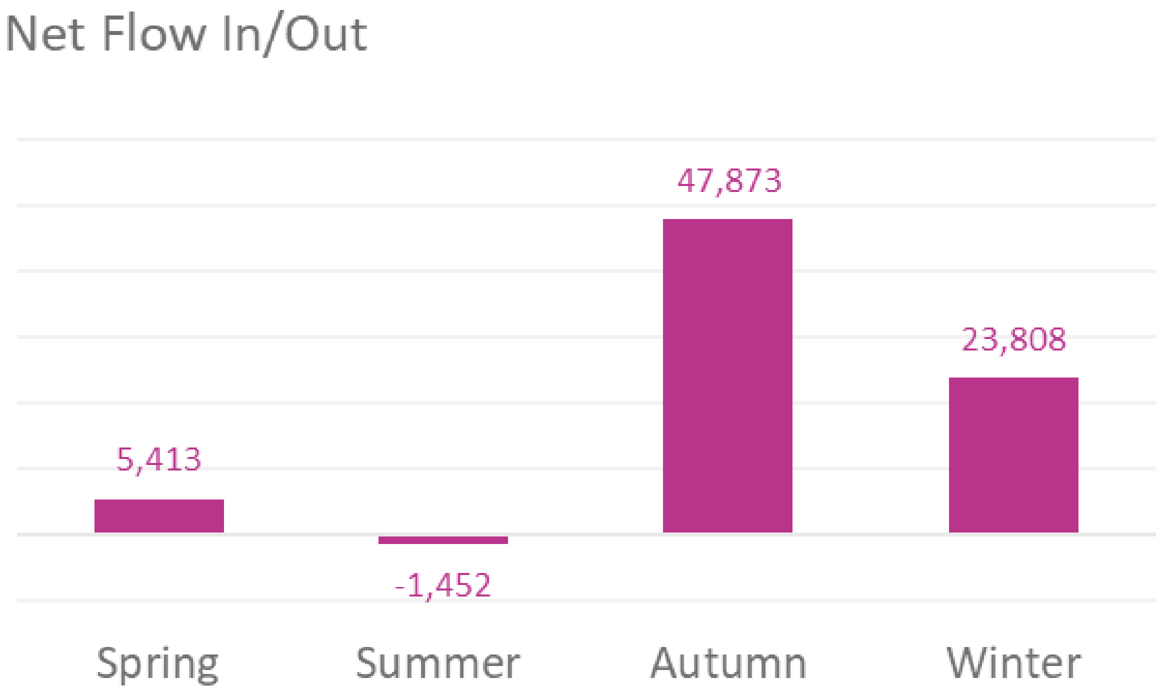
262k

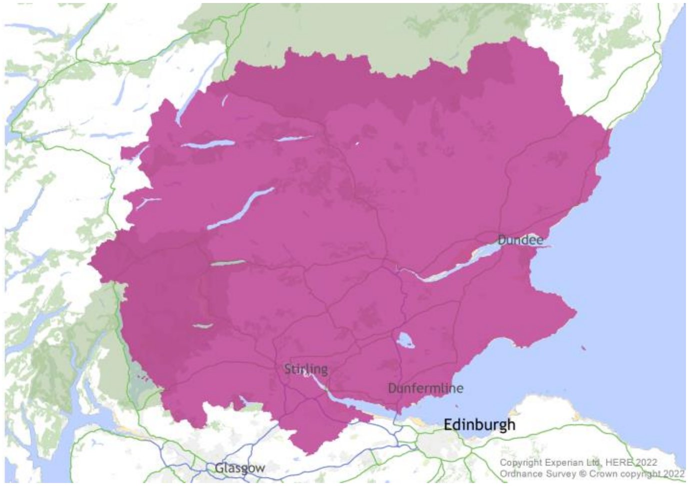




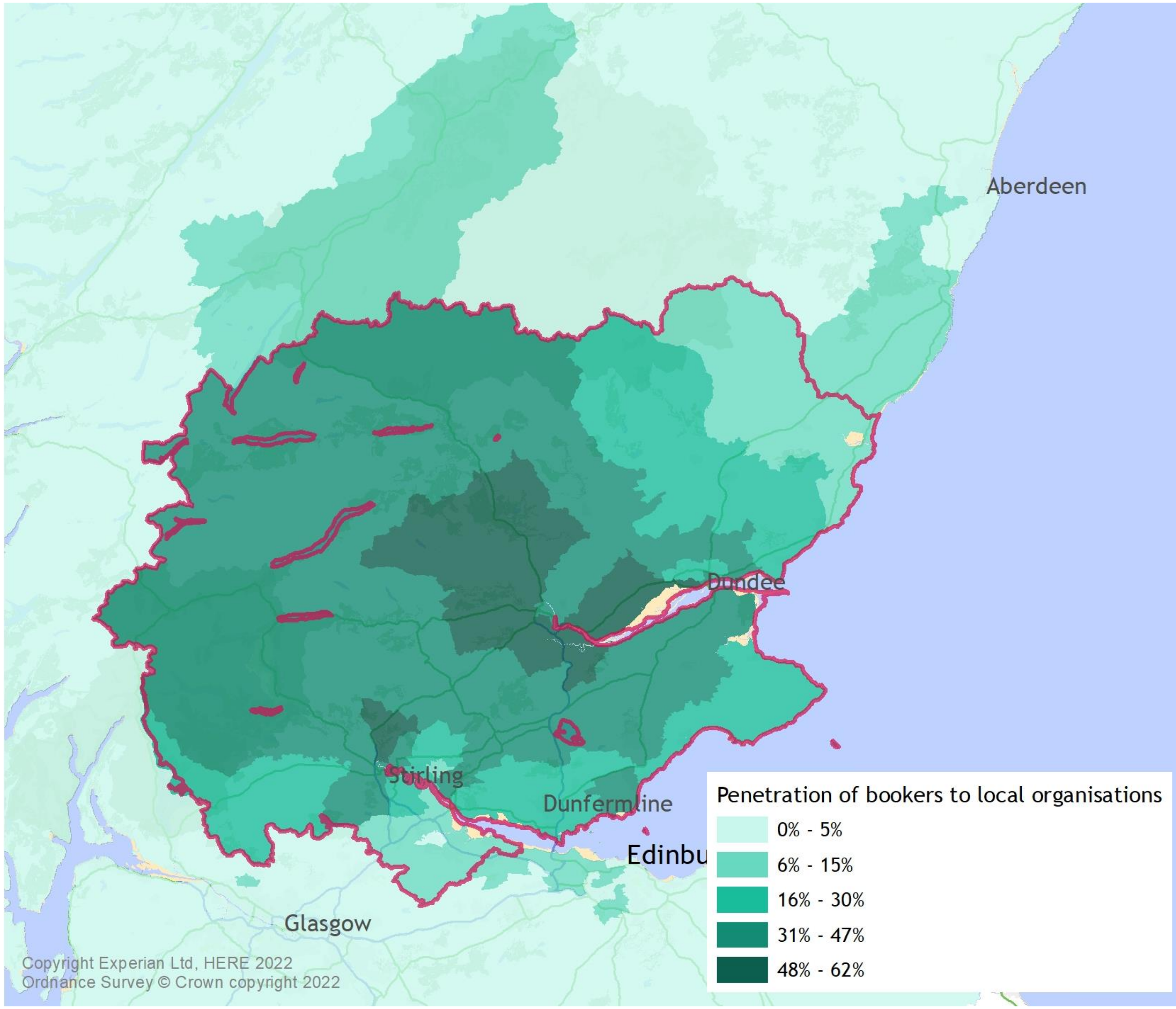
Non-Local Audiences

78k

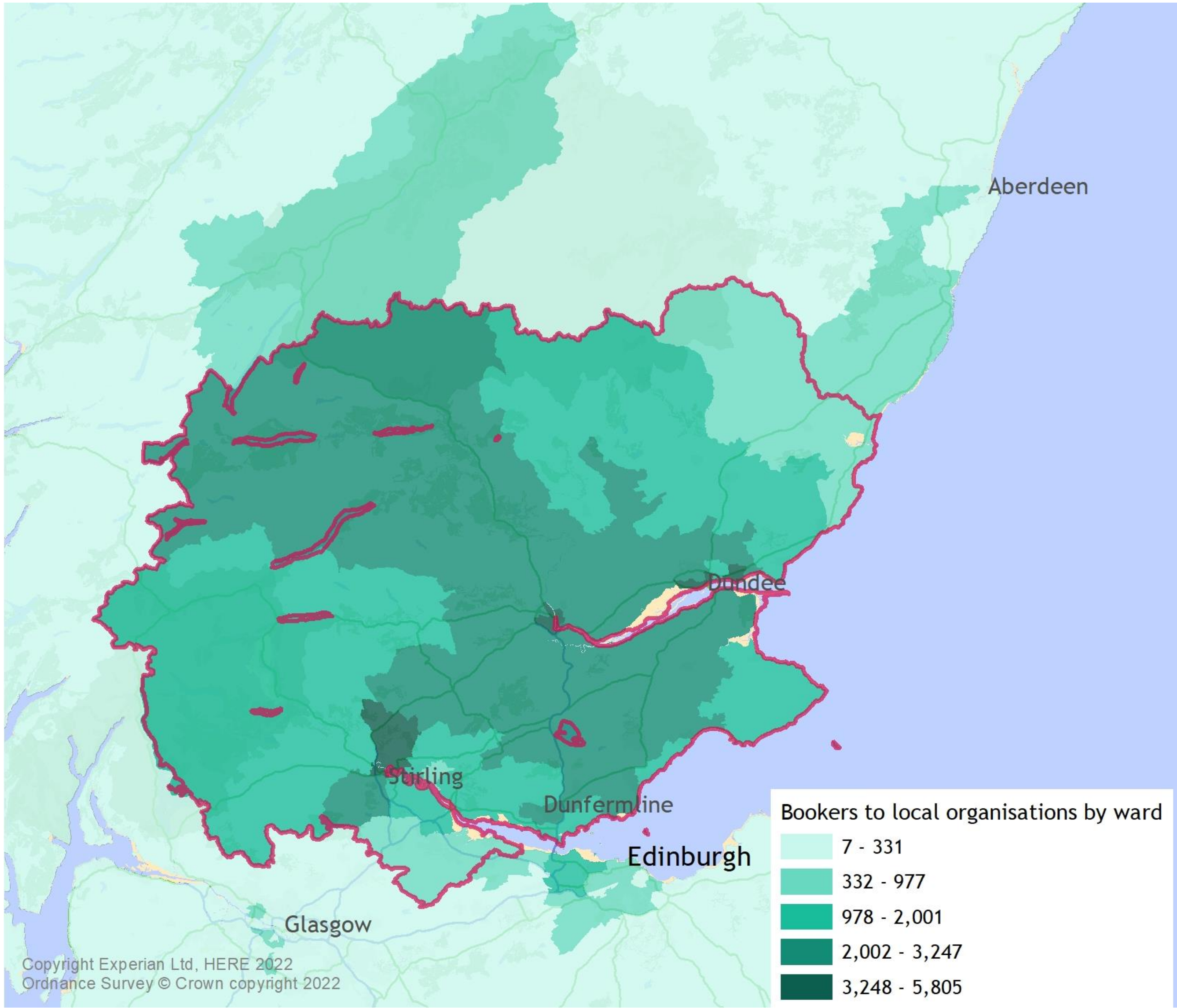




Bookers to local organisations – from further afield

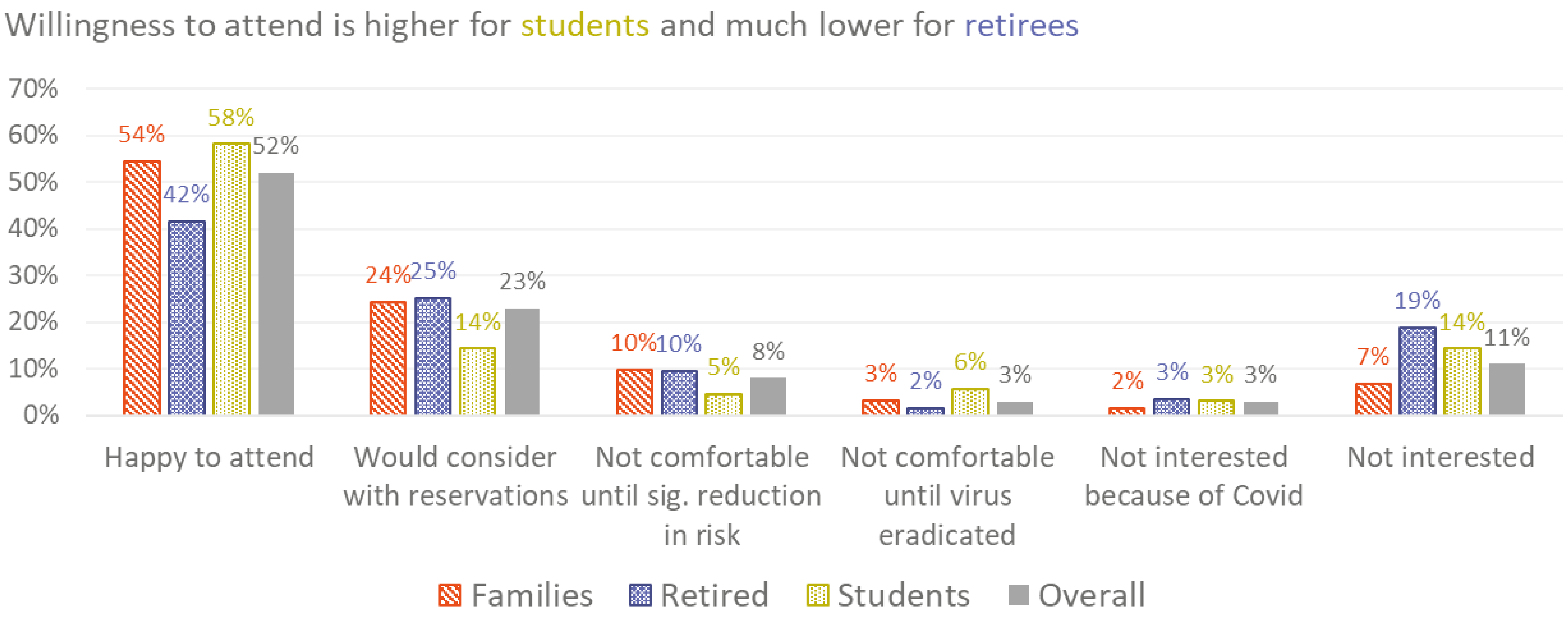


Bookers to local organisations – from further afield



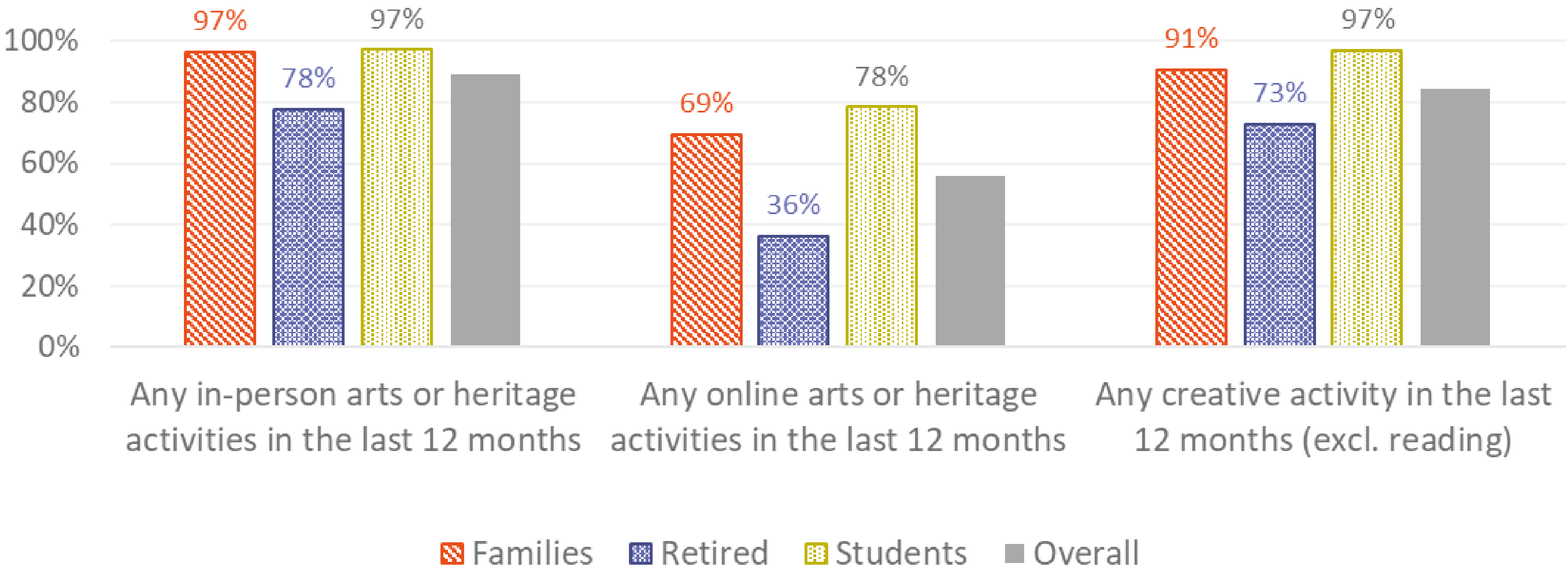
What Else Can We Say About Local Audiences?

Insights from the Cultural Participation Monitor

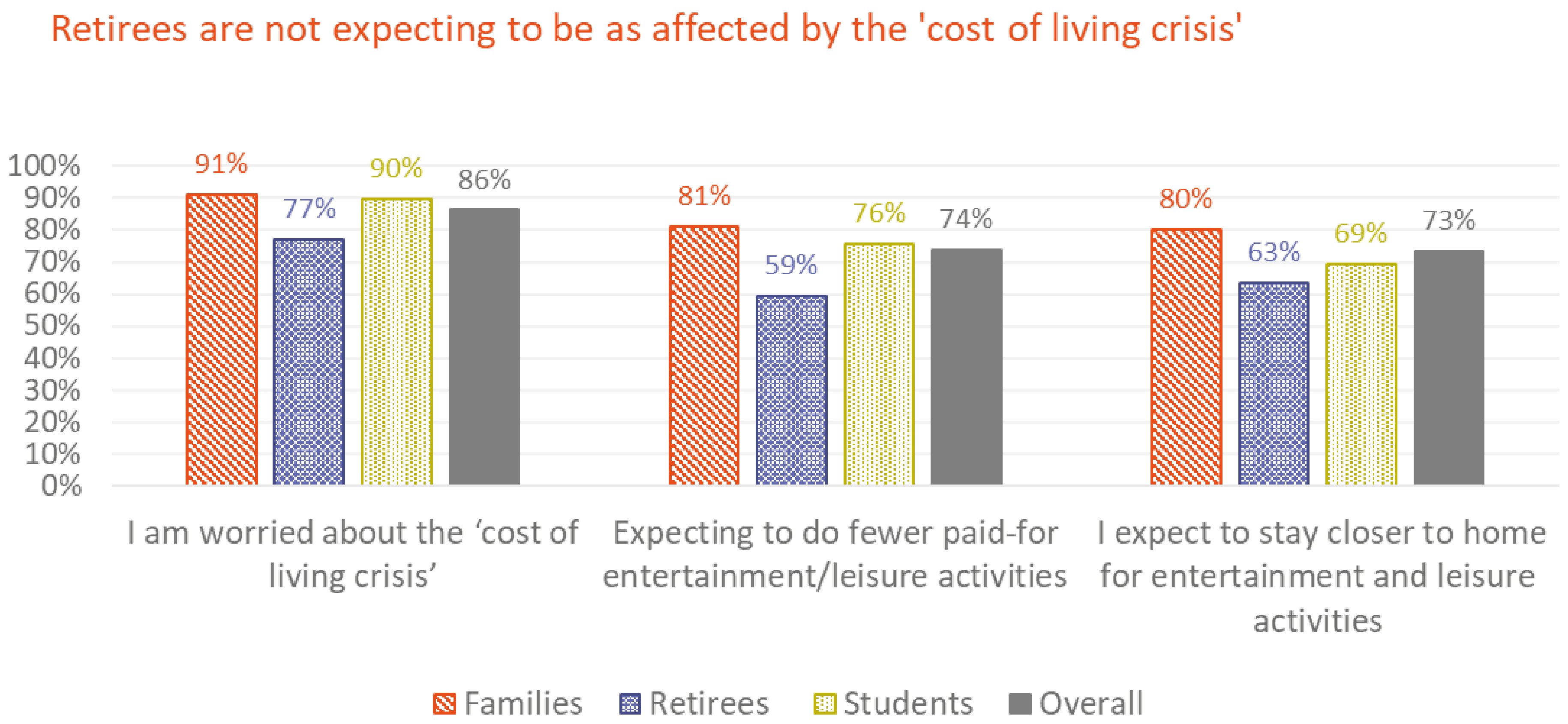


Insights from the Cultural Participation Monitor

Families and students were more likely, and retirees less likely to have taken part in any arts/heritage or creative activity in the last year



Insights from the Cultural Participation Monitor



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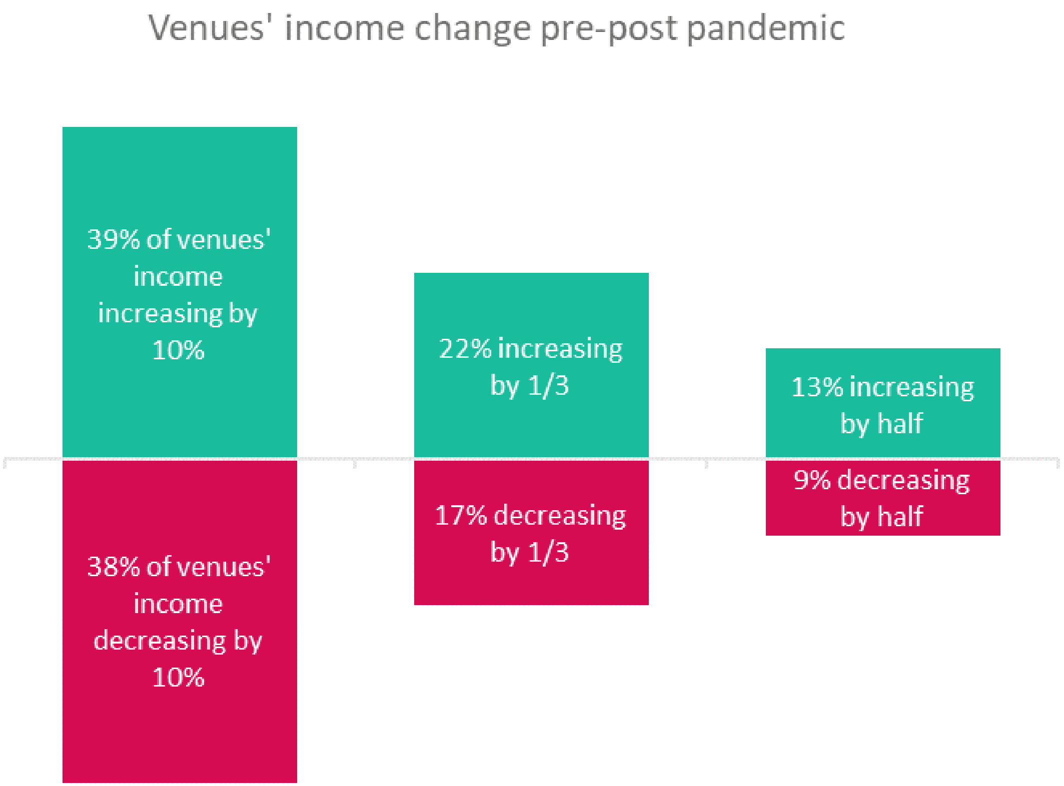
Analysis of the post-restrictions cultural recovery



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

Attitudes re Attending

- Commuterland Culturebuffs are most likely to think it's time to get back to normal (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.
- 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.

What Are the Implications?

In Conclusion…?

- Lots of demographic contrasts within the area, despite average overall picture
- Tend towards mid- to low-engaged (lower esp. for Experience Seekers)
- CS accounts for all the net ticket sales growth in Scotland 2016/17 to 2019/20
- Rise in family groups during that time (esp. mid/lower engaged).

From Discussion:

- Locals and loyal audiences driving the recovery in some theatres
- Increase in staycation in the summer – people exploring their local area
- Not all cinemas feel like they're getting their local audiences – the more 'arthouse' spaces feel like there could be a perception issue
- Cost of living is a big factor: organisations are seeing audiences cutting costs by bringing their own picnic for example
- Strategies to boost in-person attendance: focussing on the "day out" experience

In Conclusion…?

- Most audiences stay local (exc. Falkirk) / to some extent Fife.
- Big shift in non-local attendance in the summer – but boost in local attendance by non-locals in autumn.
- Variation in willingness to attend (and in person and online attendance) by demographic groups (as well as by Audience Spectrum).
- Mapping highlights the areas that are likely to rise/fall as a result.

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
  - Classical music (20/10)
  - Audience Finder Onboarding (6/10 & 24/11)
  - Museums (3/11)
  - Libraries (15/12)
- TEA Breaks (14/10 re the cost of living & monthly)

Thank you

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

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