East Central Scotland

Place Based Insights

Oliver Mantell, Director of Evidence & Insight
Elise Boileau, Evidence and Insight Senior Researcher
Isaac Kay-Lavelle, Evidence & Insight Research Assistant

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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+

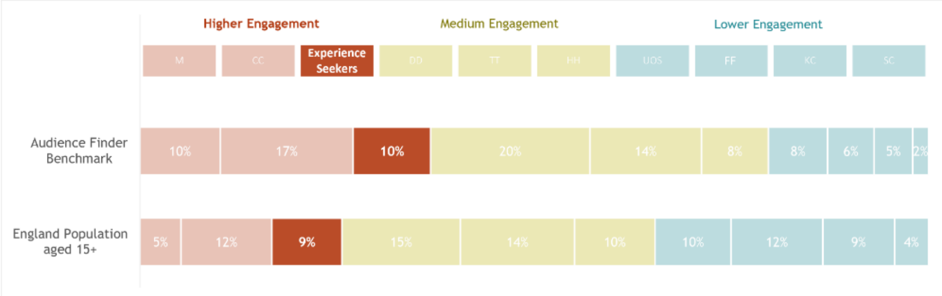
audience spectrum

Population segmentation based specifically on arts and cultural interests and behaviour

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.	About this Subsegment.



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.

Who is the Local Population?

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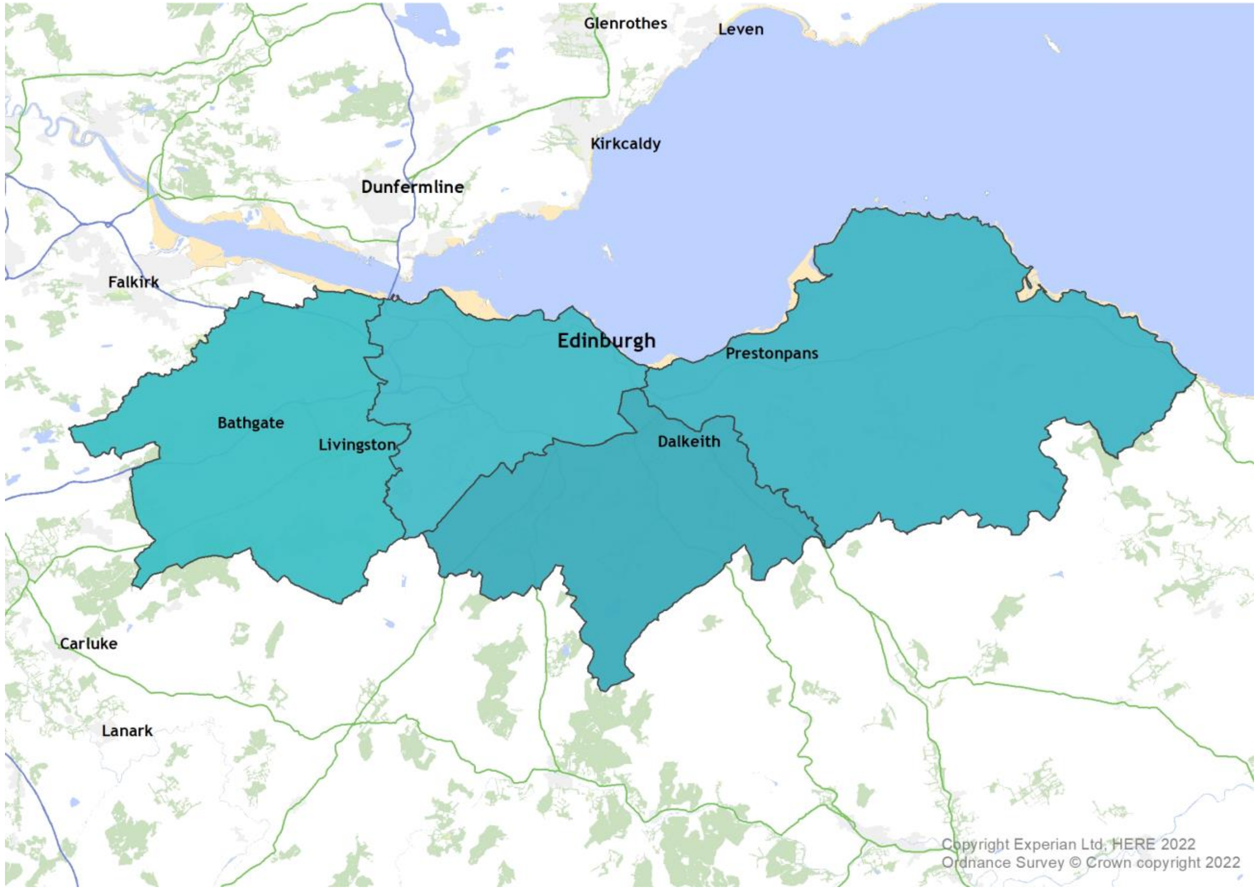
Local Area and Population

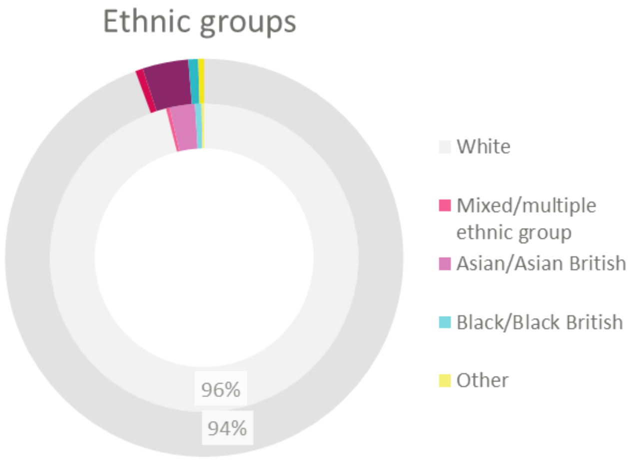
- Overview of demographics, inc. hotspots
- Audience Spectrum, inc. maps:
  - Profiles
  - Largest segment etc

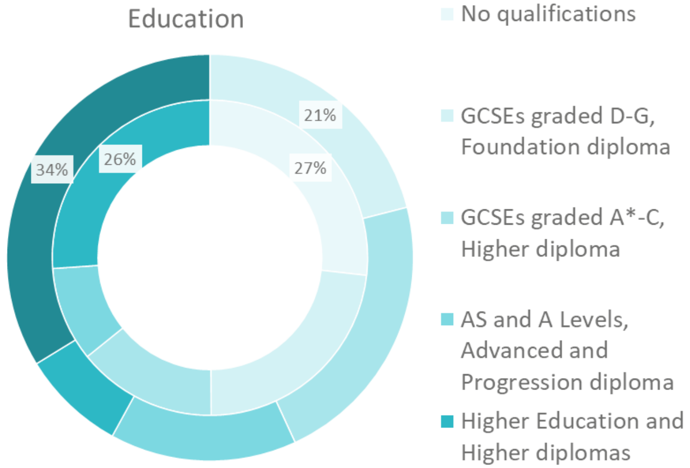


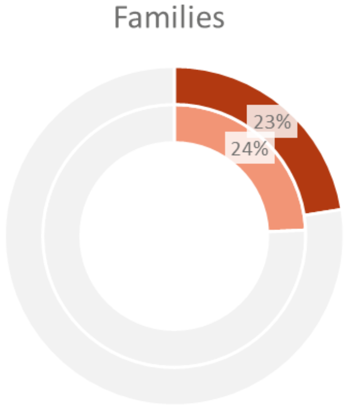
Population data – compared to rest of country

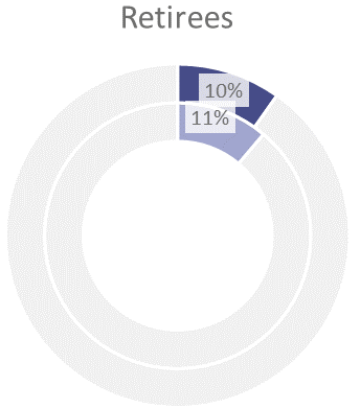
Outer ring: East Central Scotland

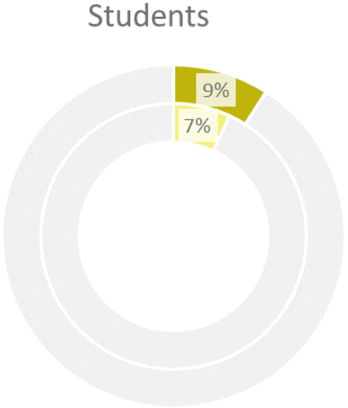
Inner ring: Scotland











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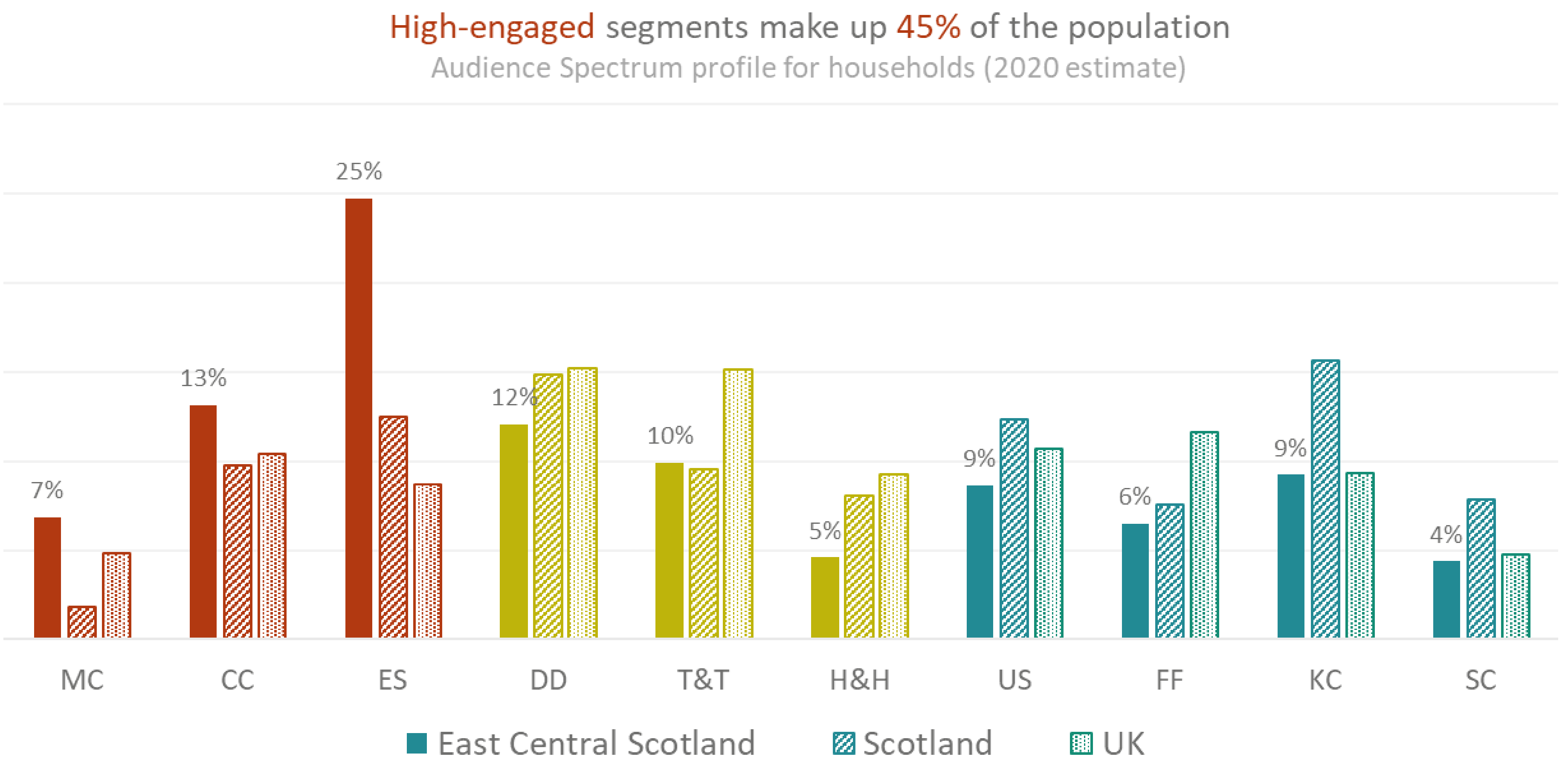
Overall Population Audience Spectrum Profile



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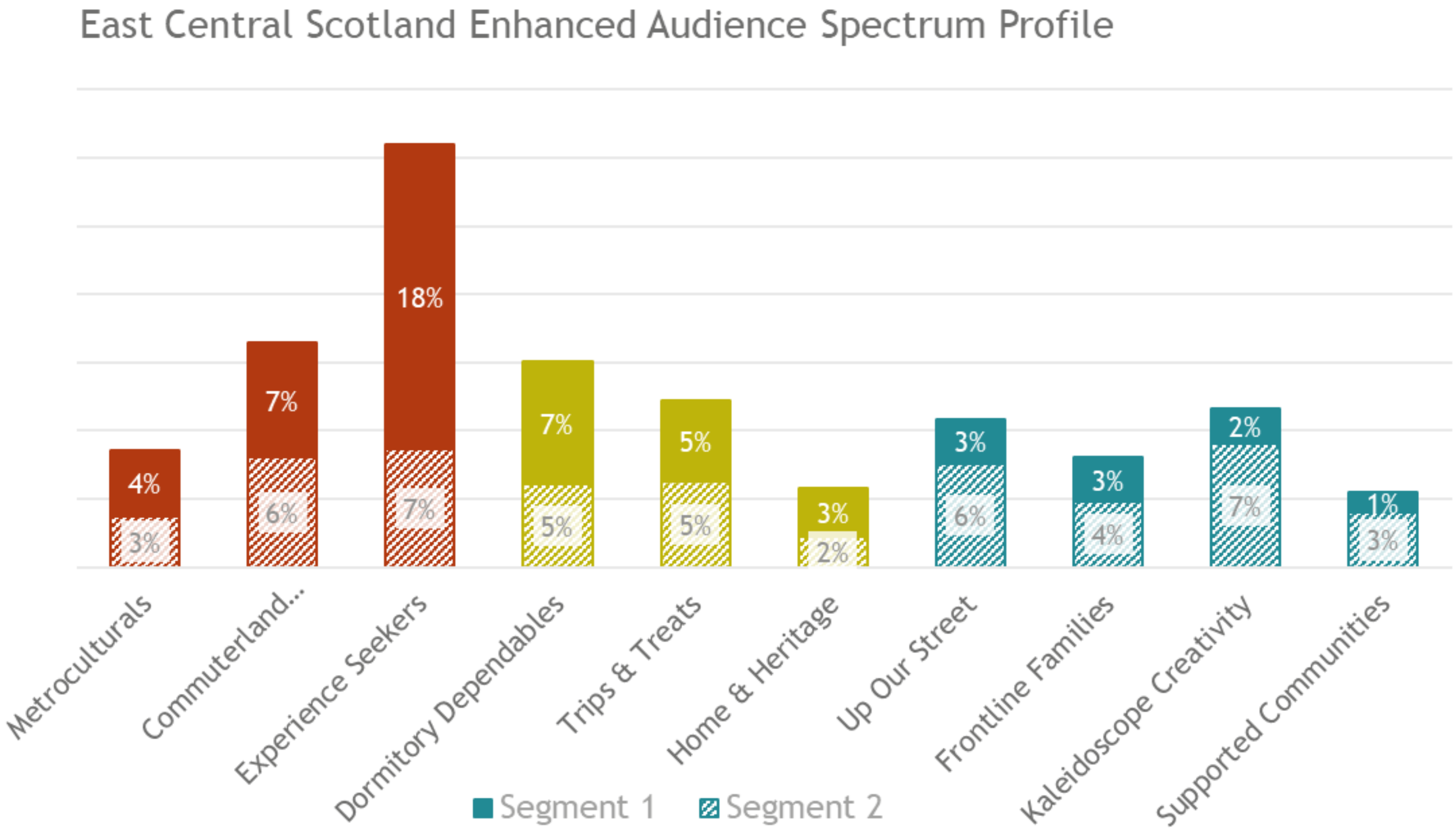
Overall Audience Spectrum Profile: Enhanced



Experience Seekers | E1
Socially minded mid-life professionals with varied artistic tastes.

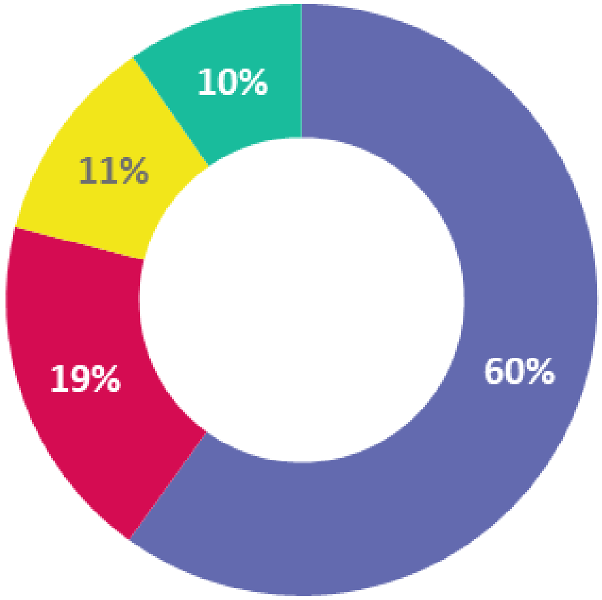
Experience Seekers| E2
Students and graduates with adventurous attitudes in diverse urban areas.

Commuterland Culturebuffs | C1
Prosperous families, living in the commuter belt of major urban centres.

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

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

Population data – comparing the local areas



416k total:

250k Edinburgh (most* Metroculturals /Experience Seekers / students / 20-29 y.o.)

79k West Lothian (most Kaleidoscope Creativity / families esp. with young children)

47k East Lothian (most Up Our Street and Frontline Families / retirees)

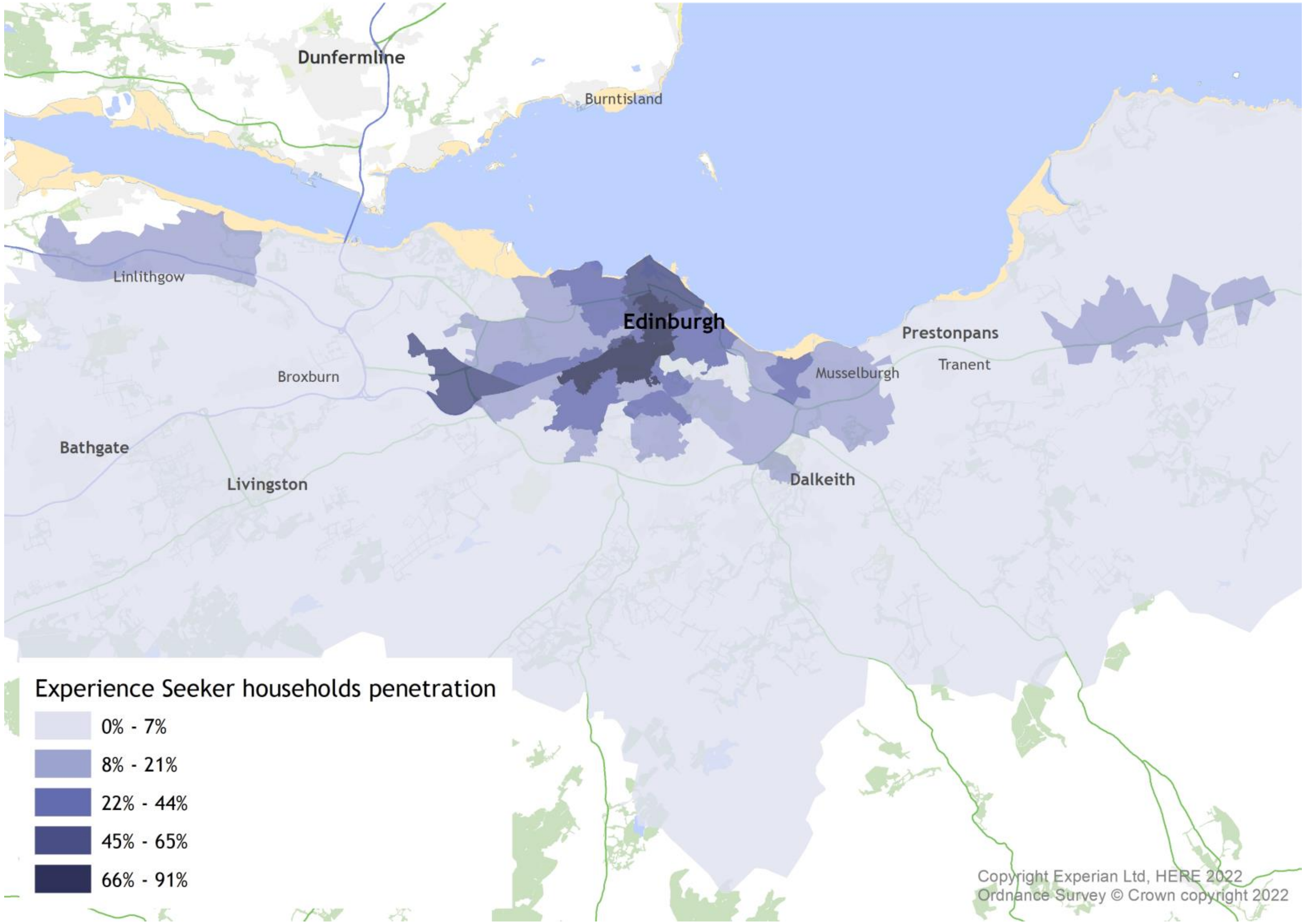
40k Midlothian (most Trips & Treats / skilled trades occupations)

*='highest %'

Where do Experience seekers live?

Top postal sectors :

1. Dalry, Edinburgh.
2. George Street, Edinburgh.



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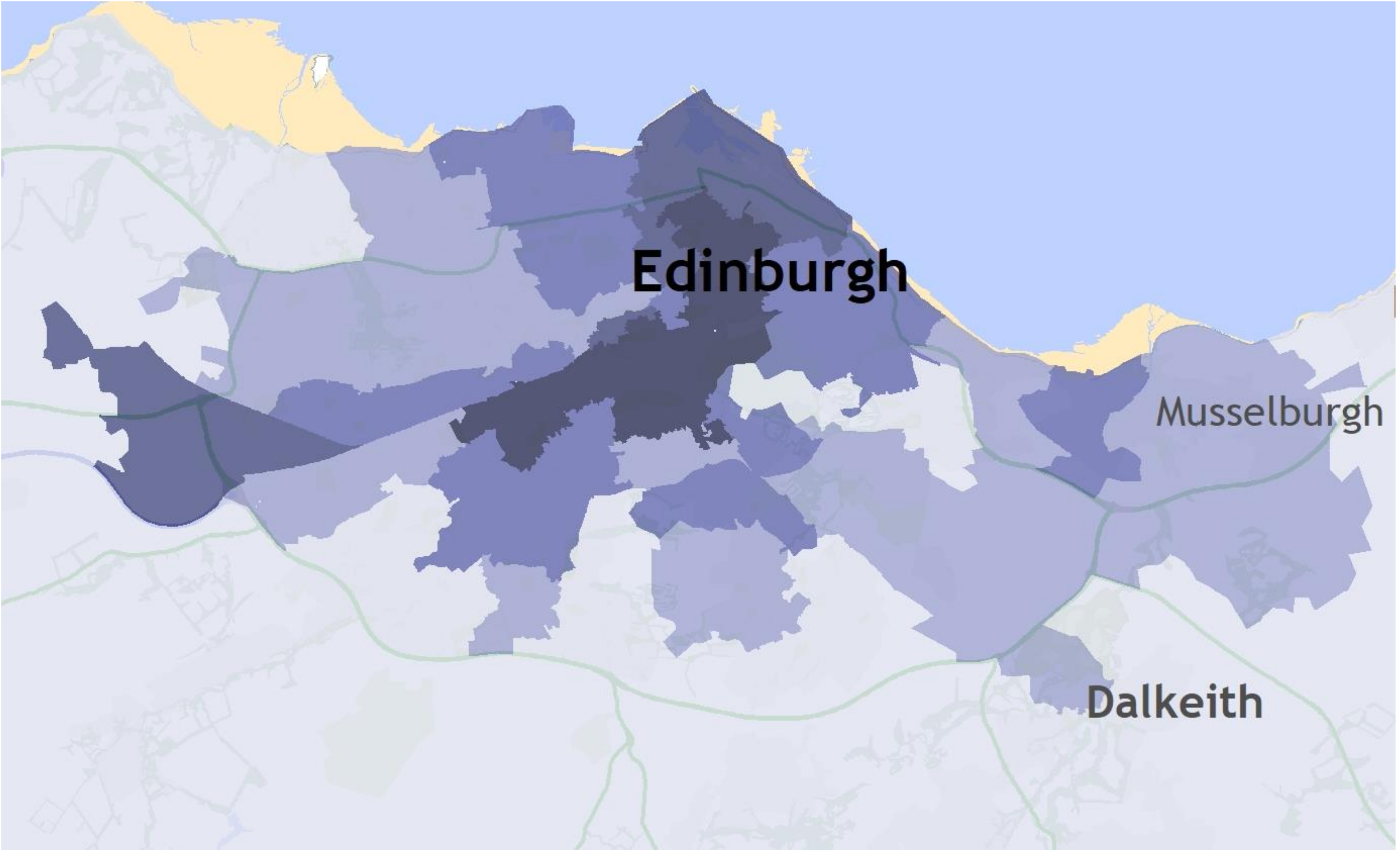

Where do Metroculturals live?

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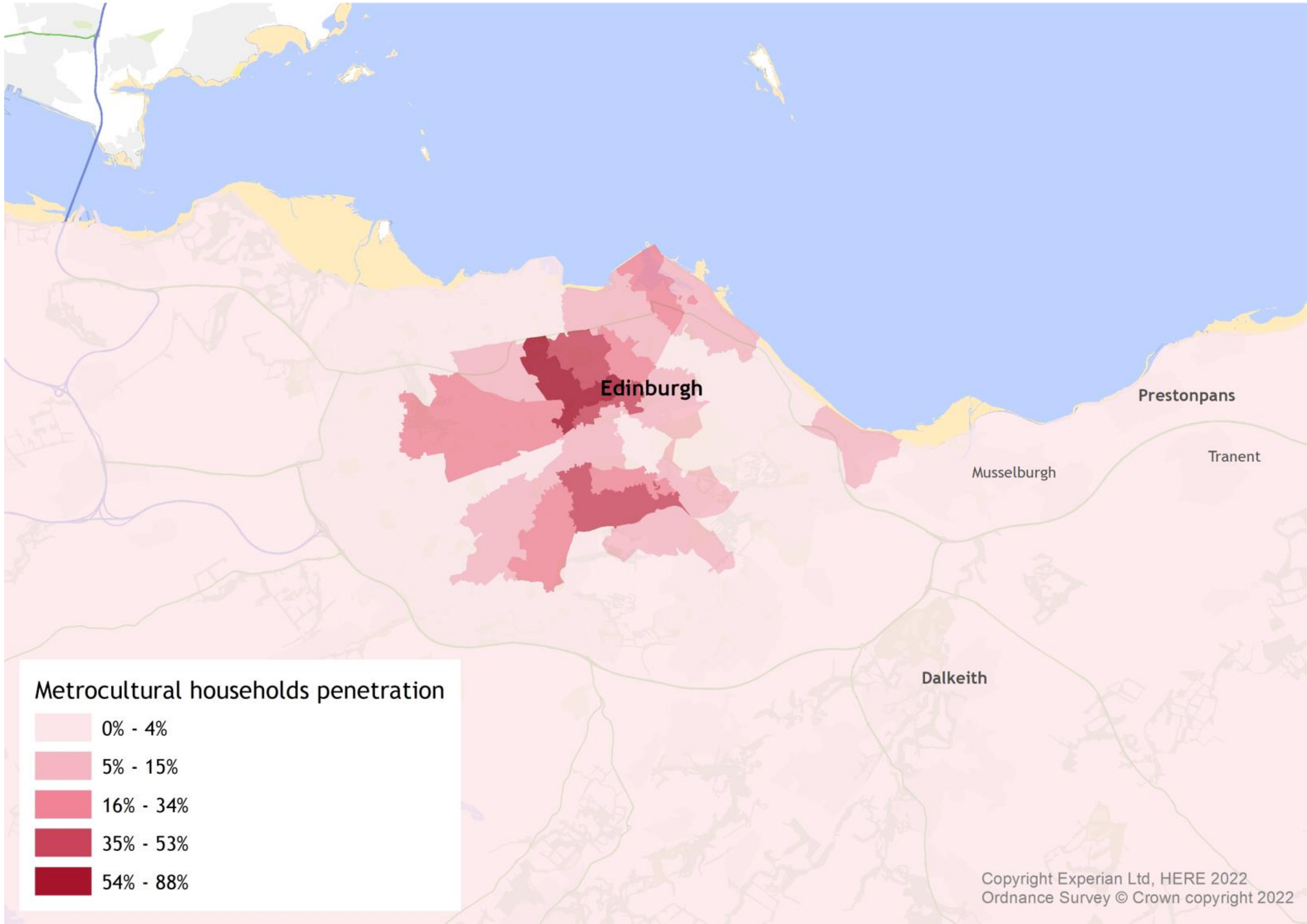
2. Cumberland Street, Edinburgh



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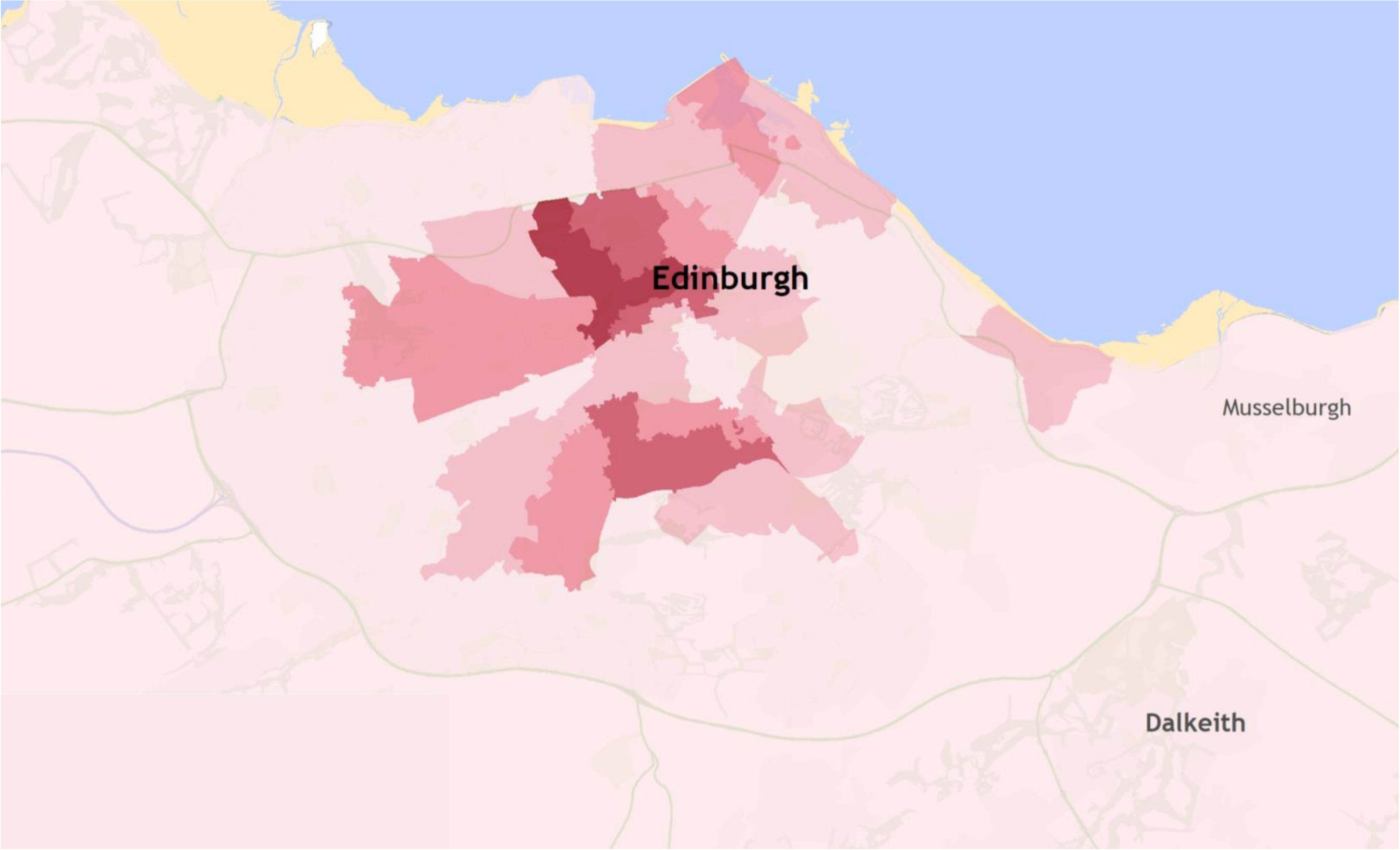

Where do those in professional occupations live?

Top postal sectors:

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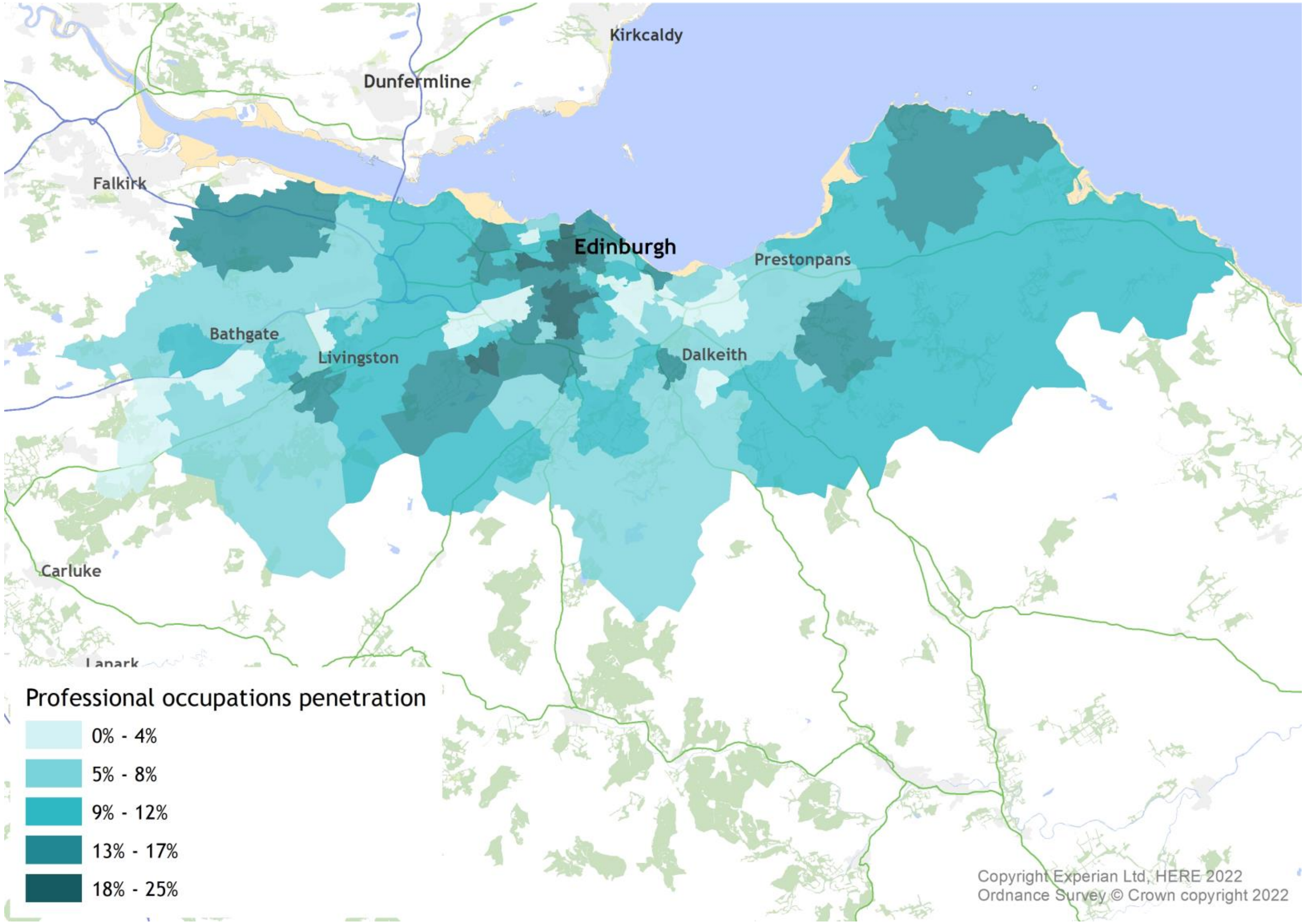
2. Manor Place, Edinburgh



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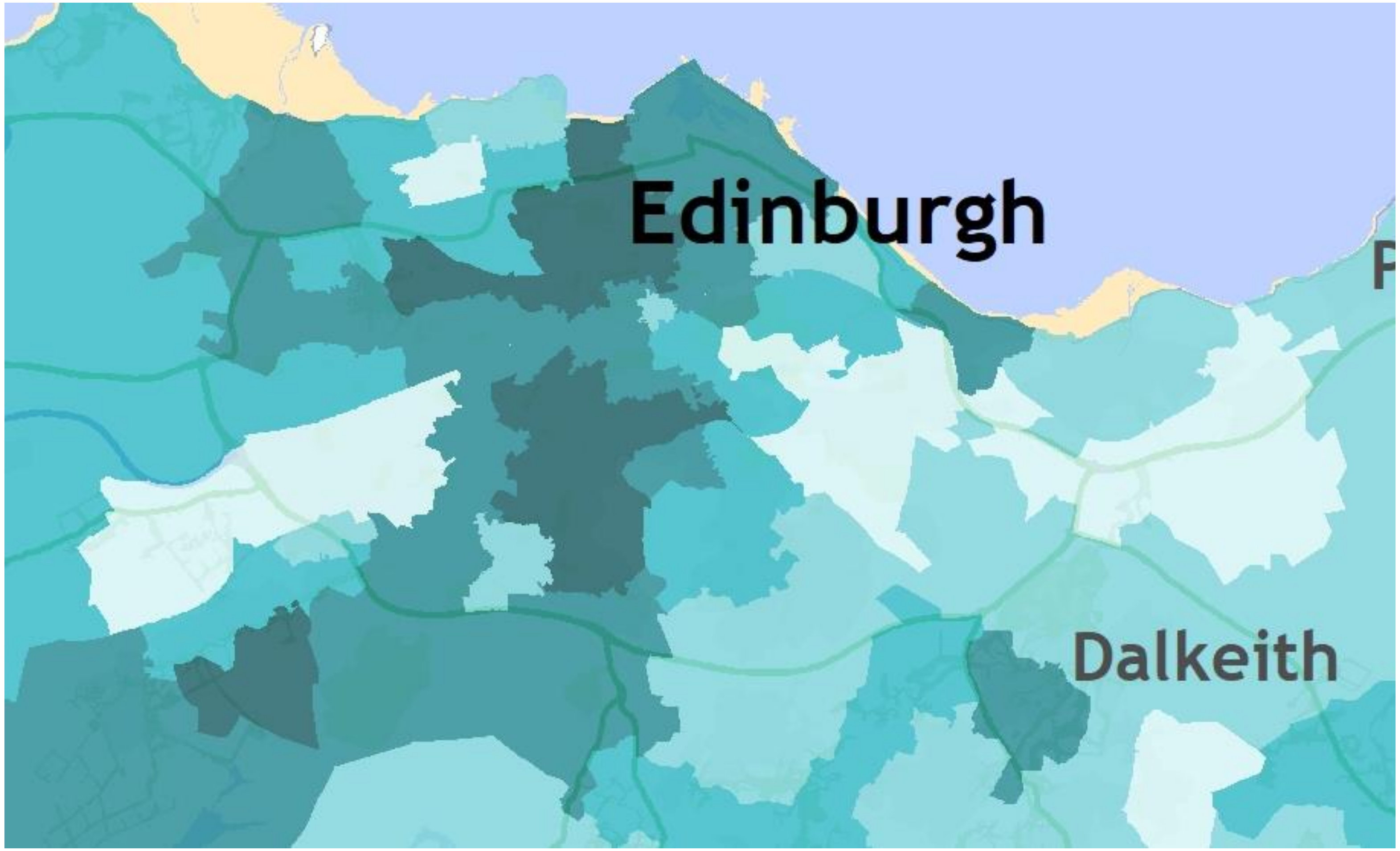
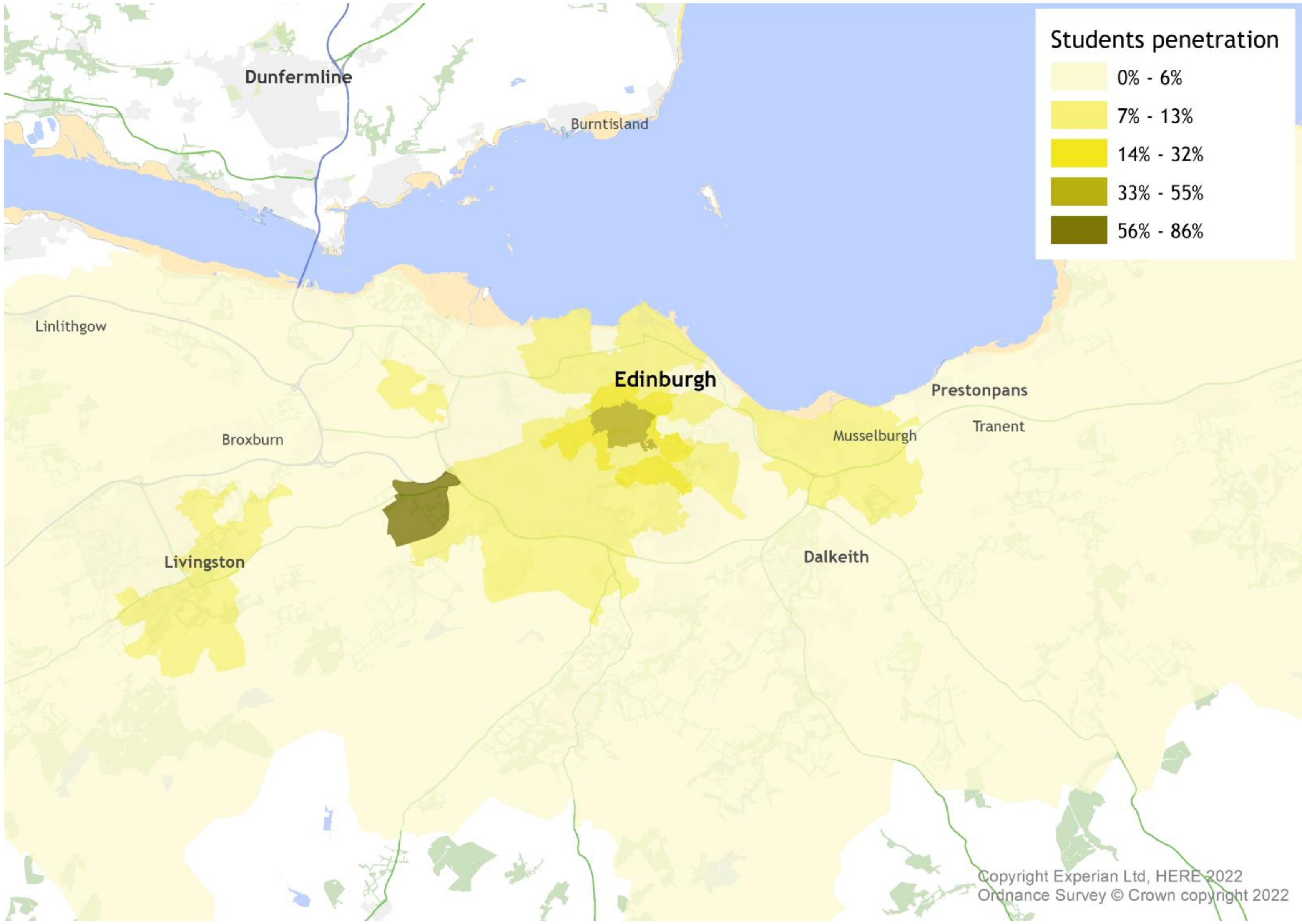


Where do students live?

Top postal sectors:

1. Currie (Incl Riccarton, Hermiston), Edinburgh outskirts.
2. High Street, Edinburgh.



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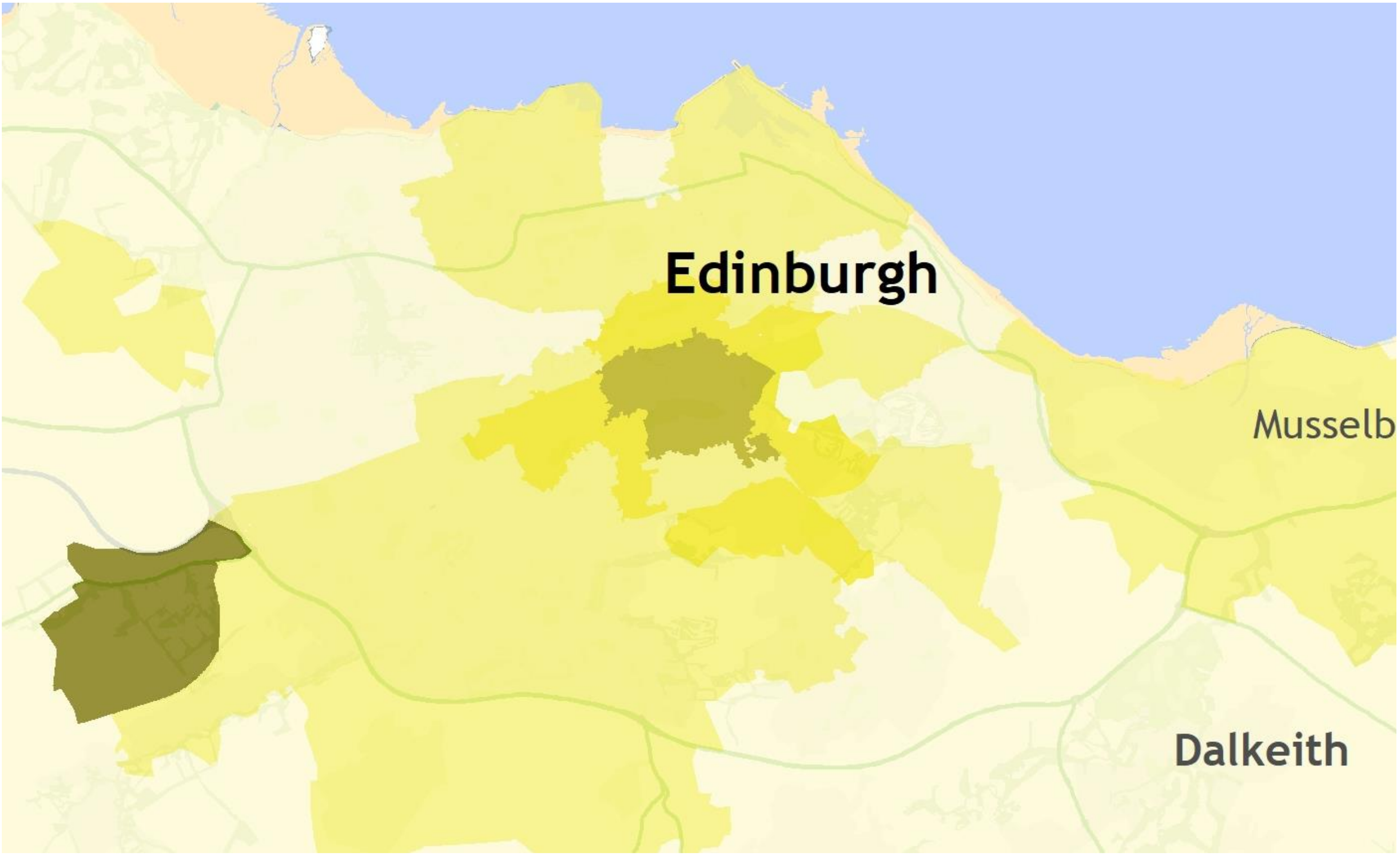

Where do families live?

Top postal sectors :

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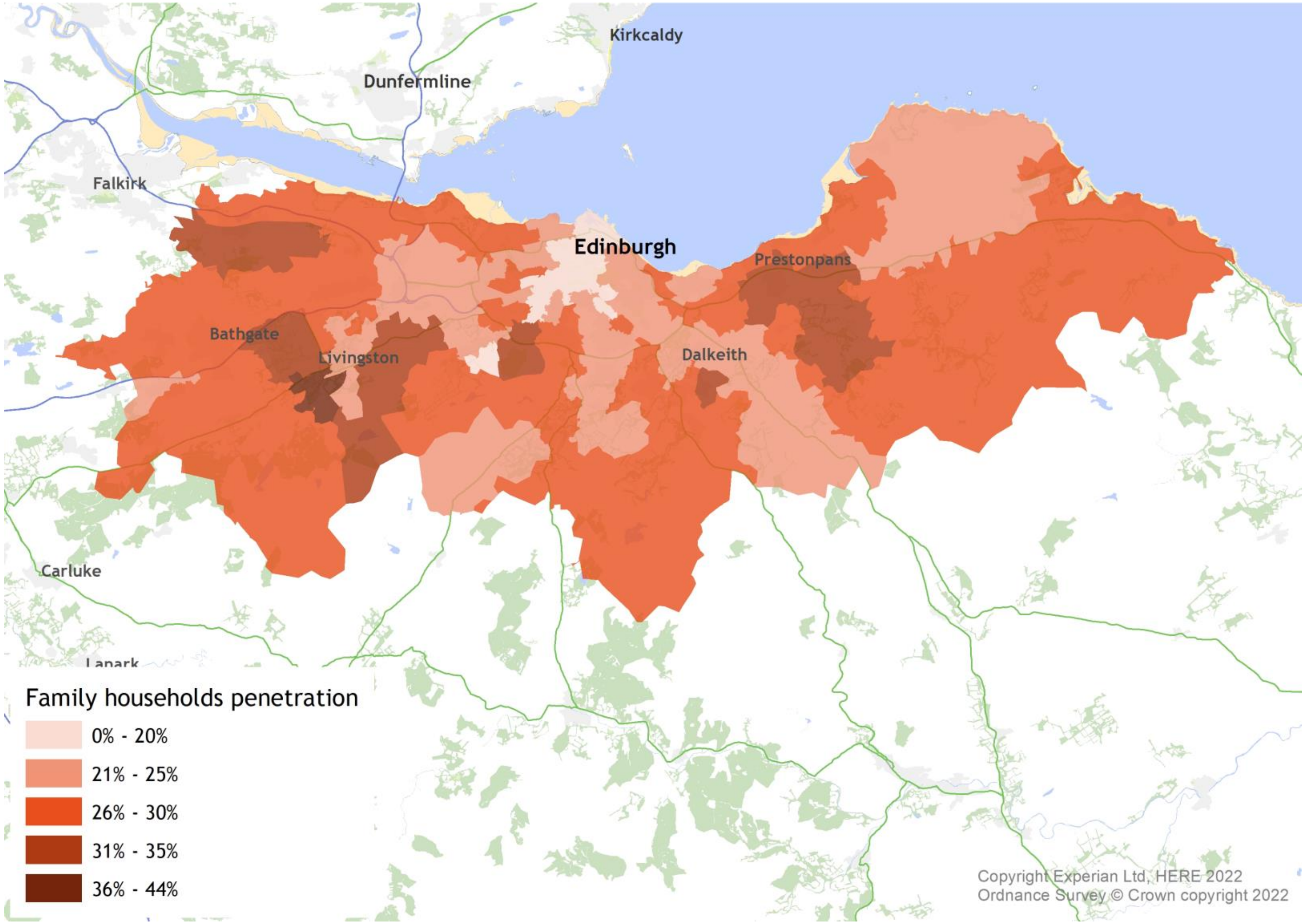
2. Kirknewton (Incl Wilkieston, The Camps), West Lothian.



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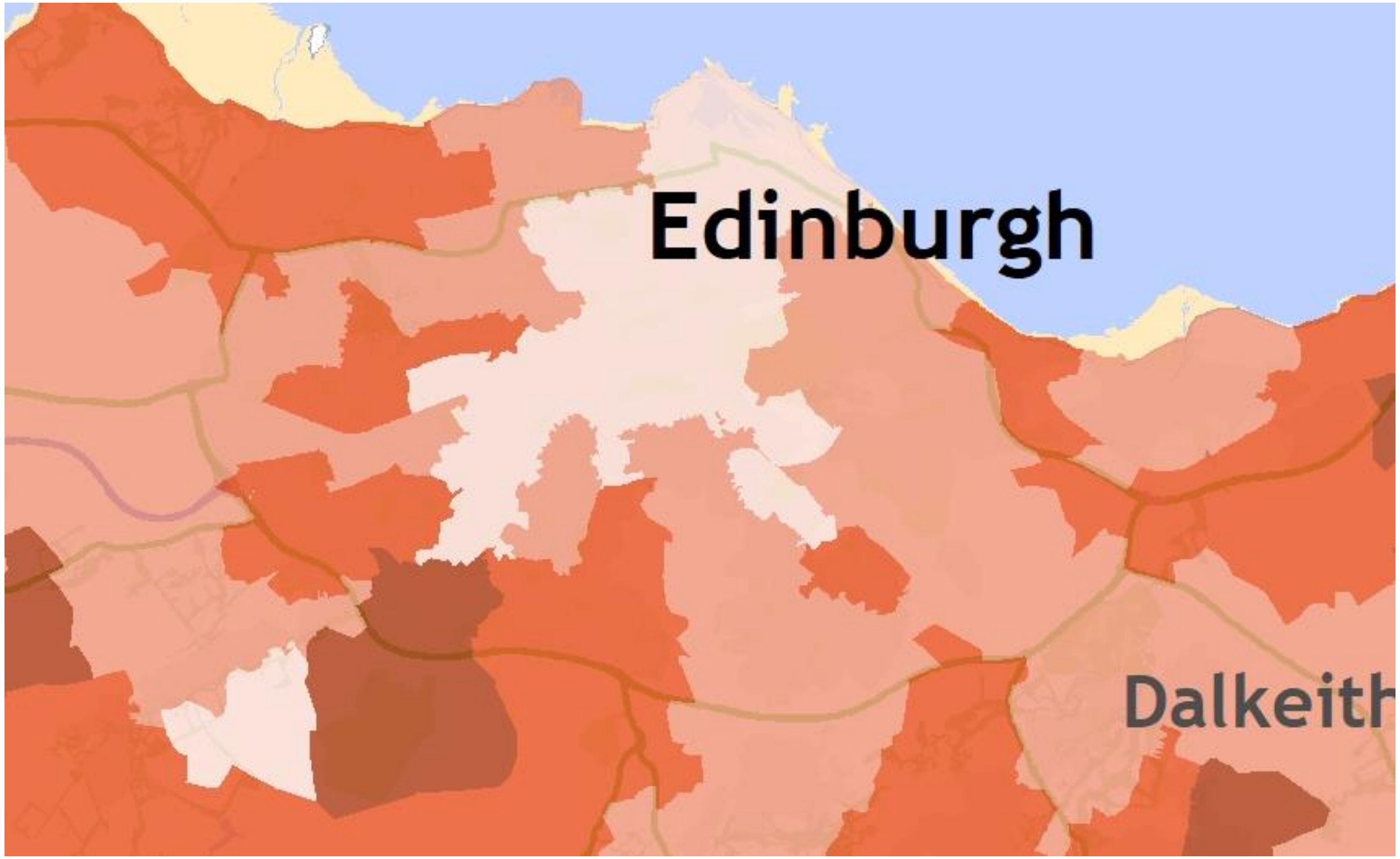

Wards with Highest % by Audience Spectrum

Segment	Highest	Second Highest	Third Highest
Metroculturals	Inverleith (40%)	City Centre (39%) **5th highest in UK**	Morningside (30%)
Commuterland Culturebuffs	Colinton/Fairmilehead (47%)	North Berwick Coastal (40%)	Linlithgow (35%)
Experience Seekers	Leith Walk (79%) **Highest in UK**	Leith (68%)	Sighthill/Gorgie (59%)
Dormitory Dependables	Bonnyrigg (27%)	Livingston North (25%)	Dunbar and East Linton (24%)
Trips & Treats	Dunbar and East Linton (31%)	Midlothian South (25%)	Haddington and Lammermuir (24%)
Home & Heritage	North Berwick Coastal (17%)	Corstorphine/Murrayfield (12%)	Dunbar and East Linton (11%)
Up Our Street	Broxburn, Uphall and Winchburgh (23%)	Dalkeith (20%)	Whitburn and Blackburn (19%)
Frontline Families	Livingston South (29%)	Midlothian East (20%)	Livingston North (20%)
Kaleidoscope Creativity	Pentland Hills (29%)	Fauldhouse and the Breich Valley (29%)	Whitburn and Blackburn (22%)
Supported Communities	Whitburn and Blackburn (14%)	Fauldhouse and the Breich Valley (12%)	East Livingston and East Calder (11%)

Who is the Local Audience?

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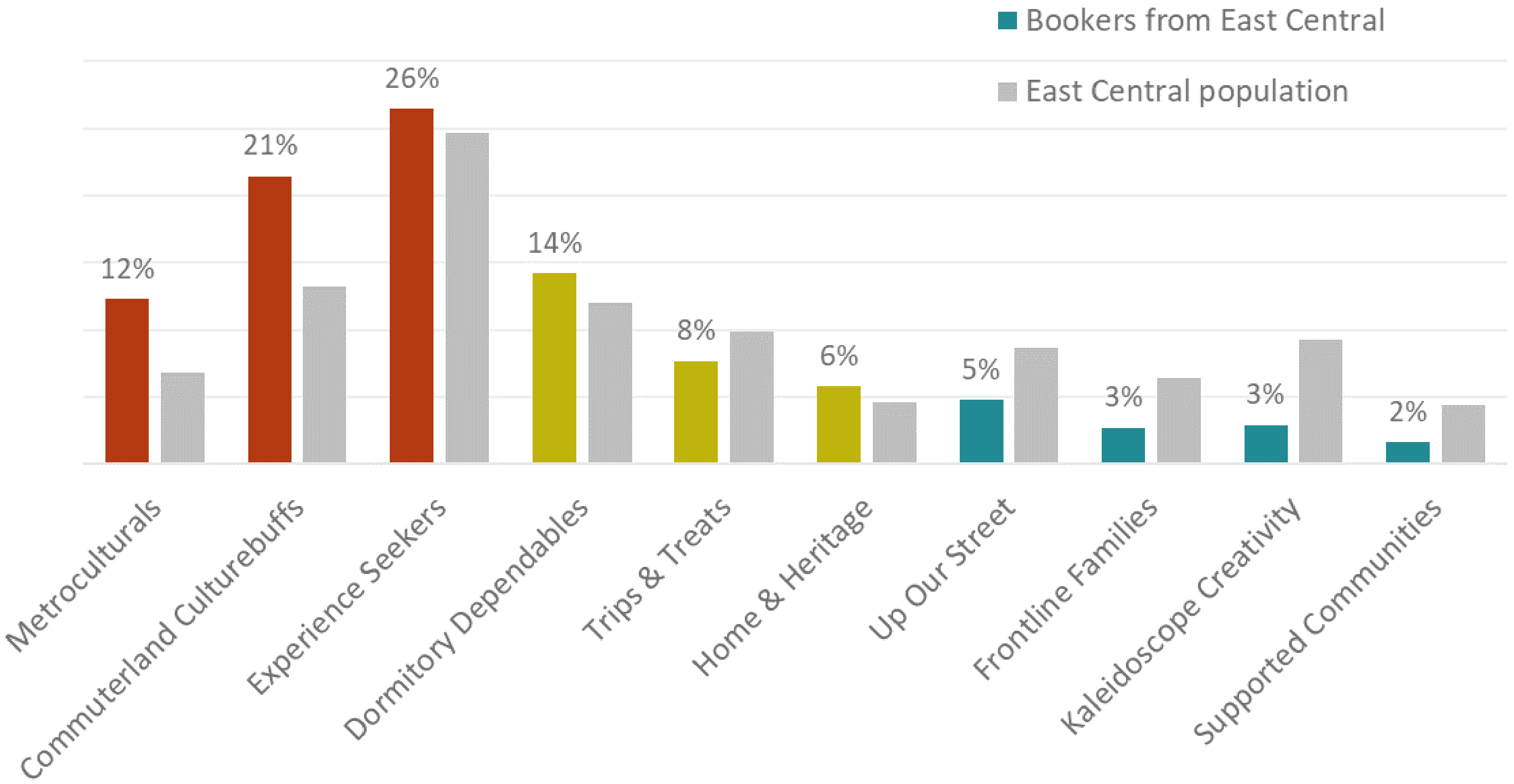
Profile of Local Audiences



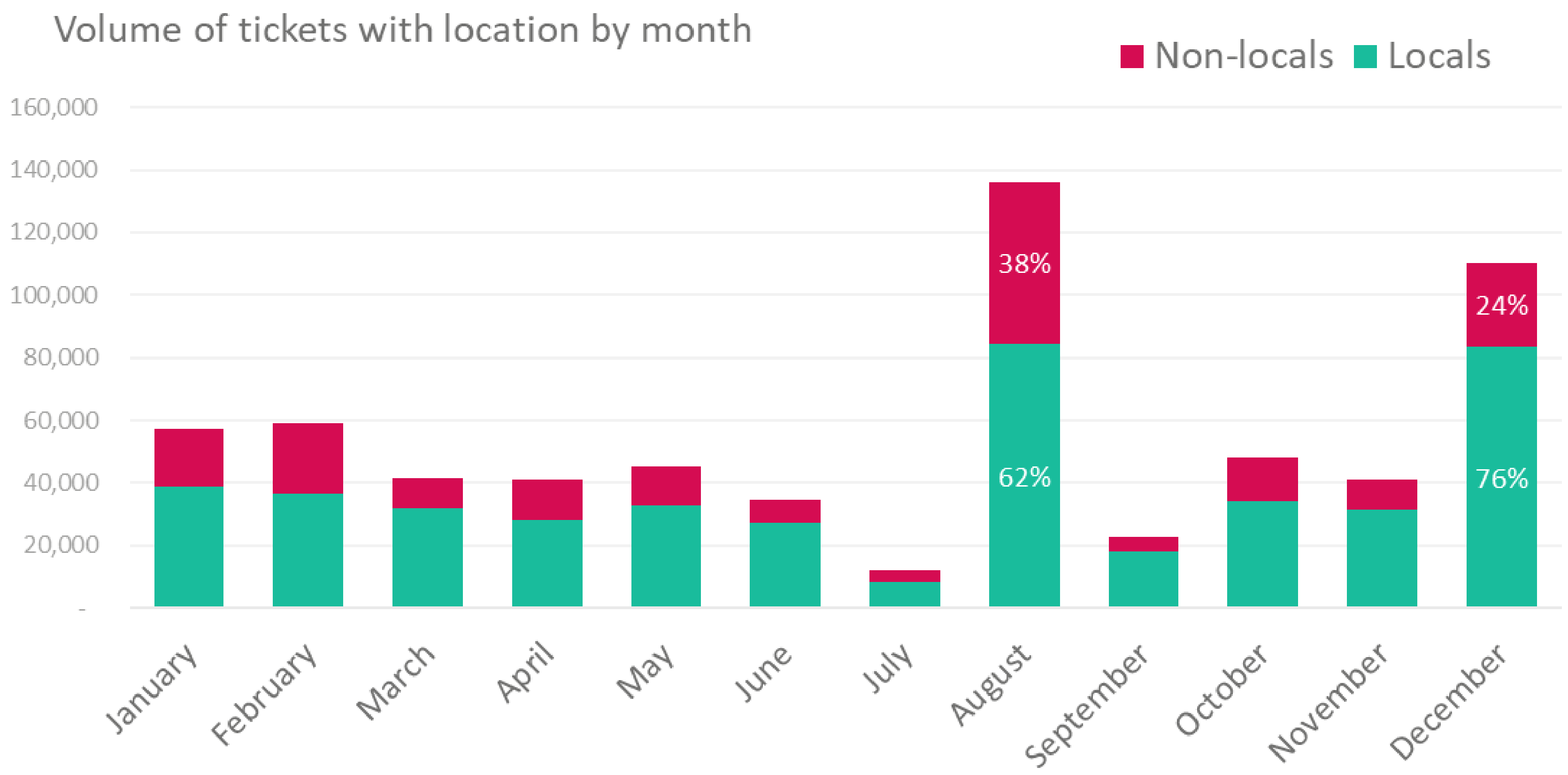
Monthly tickets issued

Audience Finder ticketing:

Local Venues Included:
Capital Theatres
CMI Scotland
Edinburgh International Festival
Lyceum Edinburgh
The Brunton
Traverse Theatre

Monthly tickets issued

Monthly tickets issued



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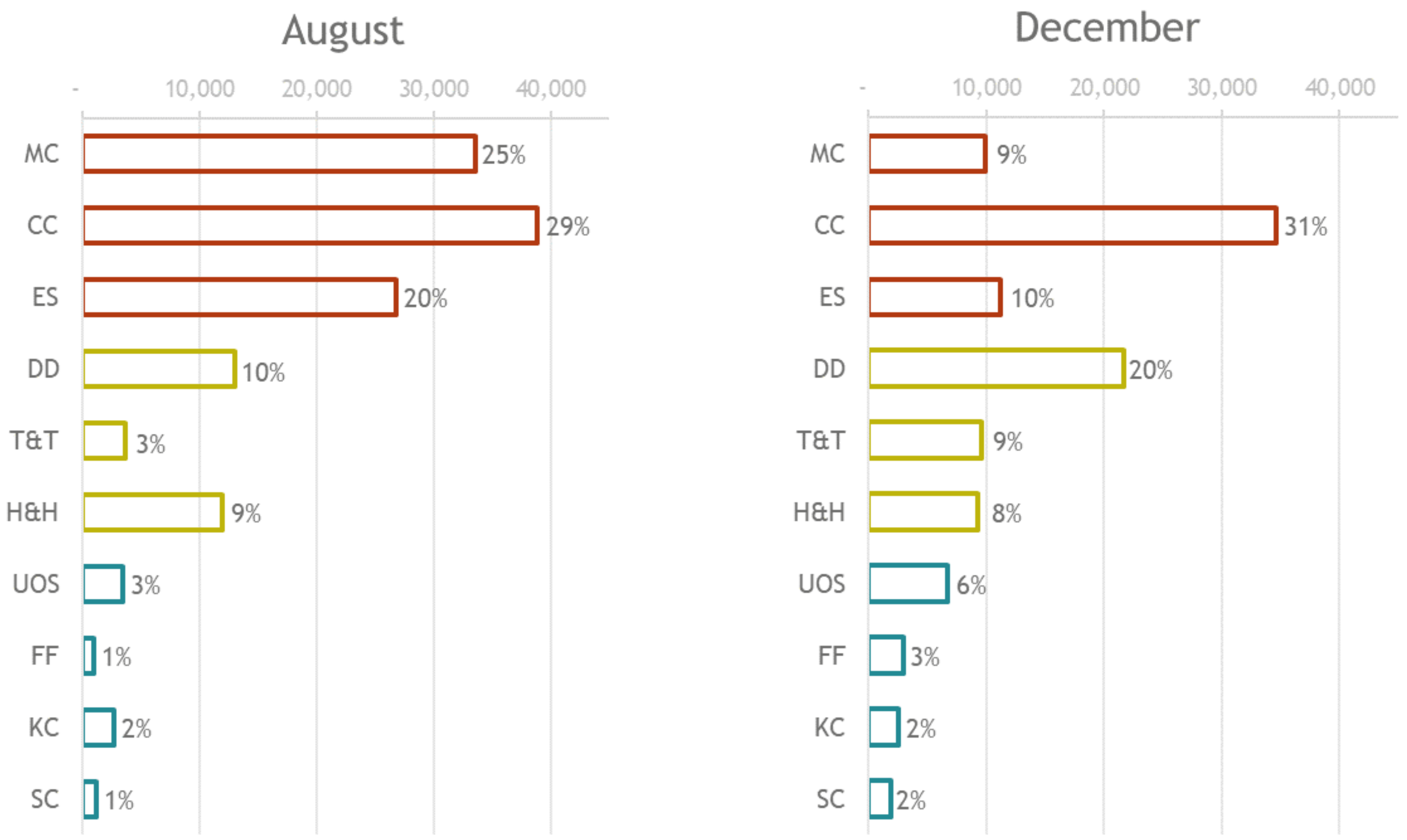
Profile of Local Audiences



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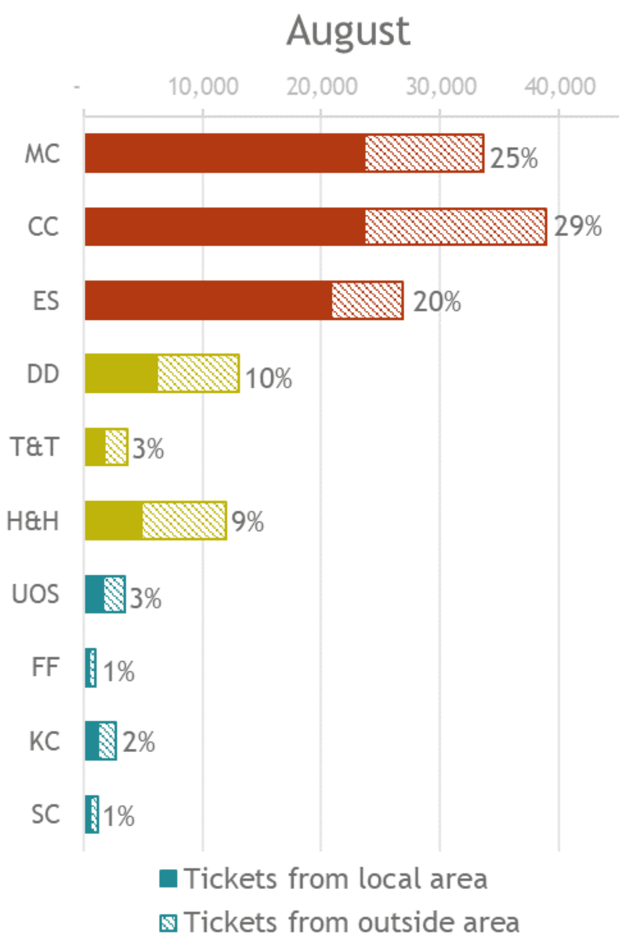
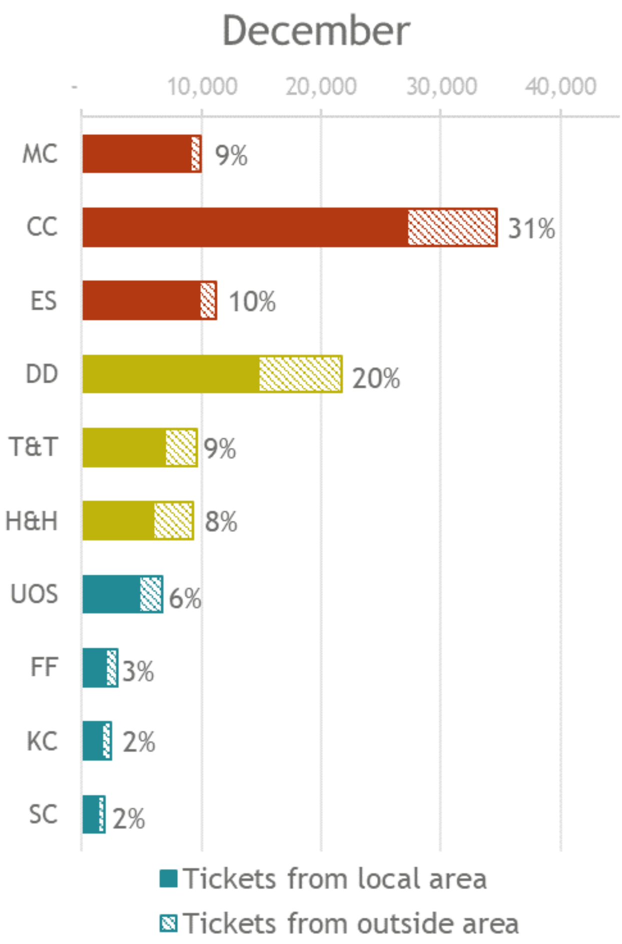
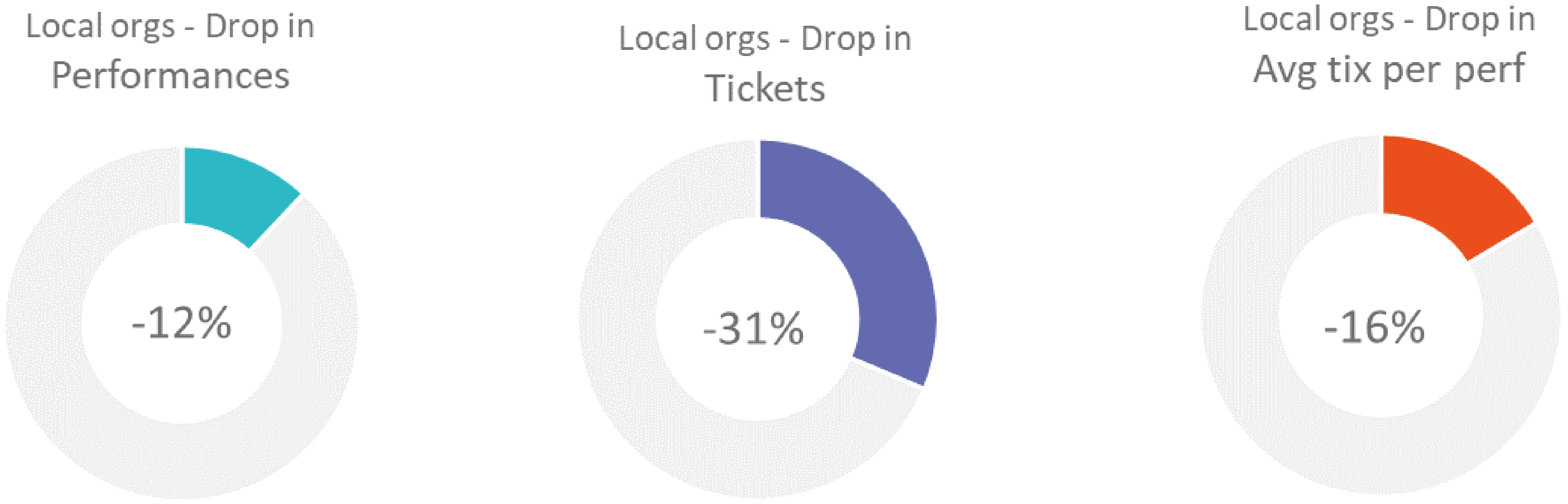




Change analysis

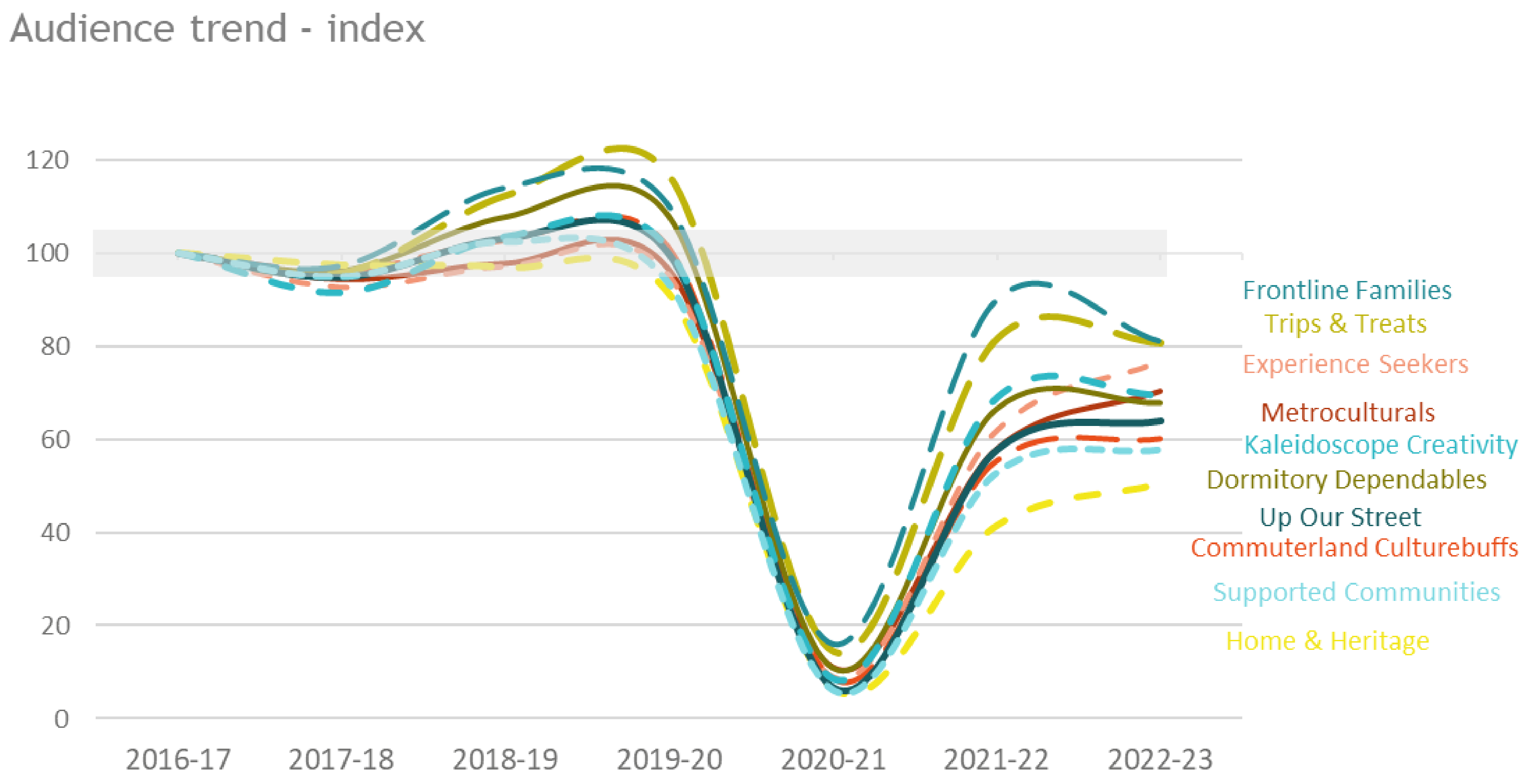
Change from Pre-Covid Benchmark



Change from Pre-Covid Benchmark - Profile

Families Lower/Middle Income

Older groups



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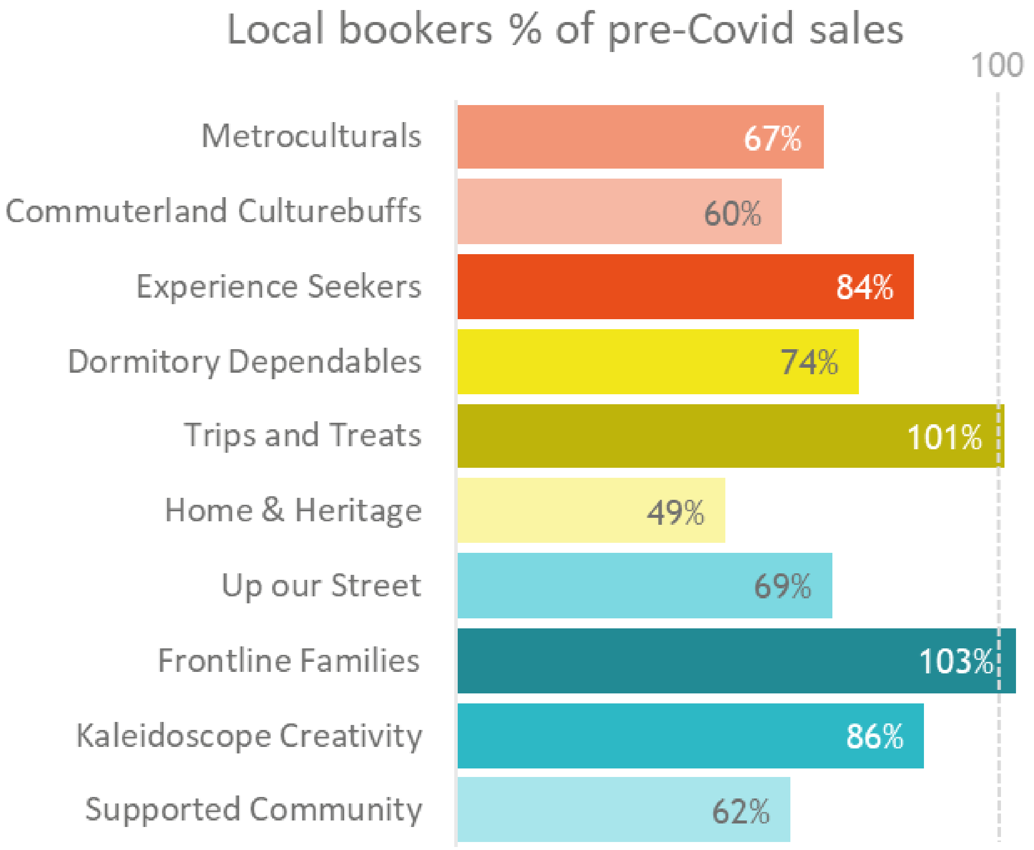
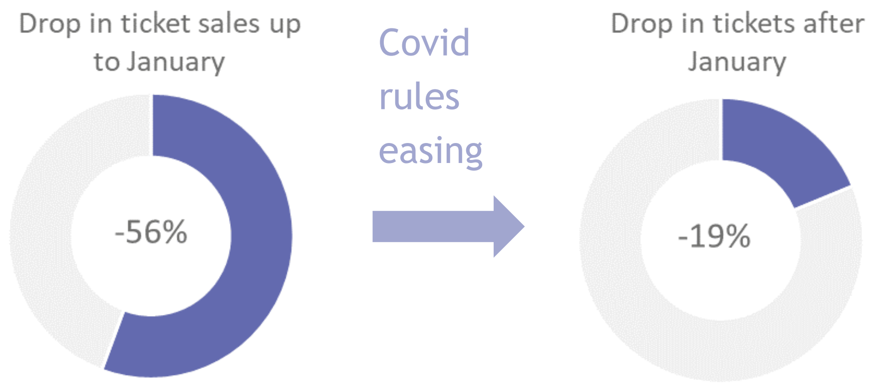
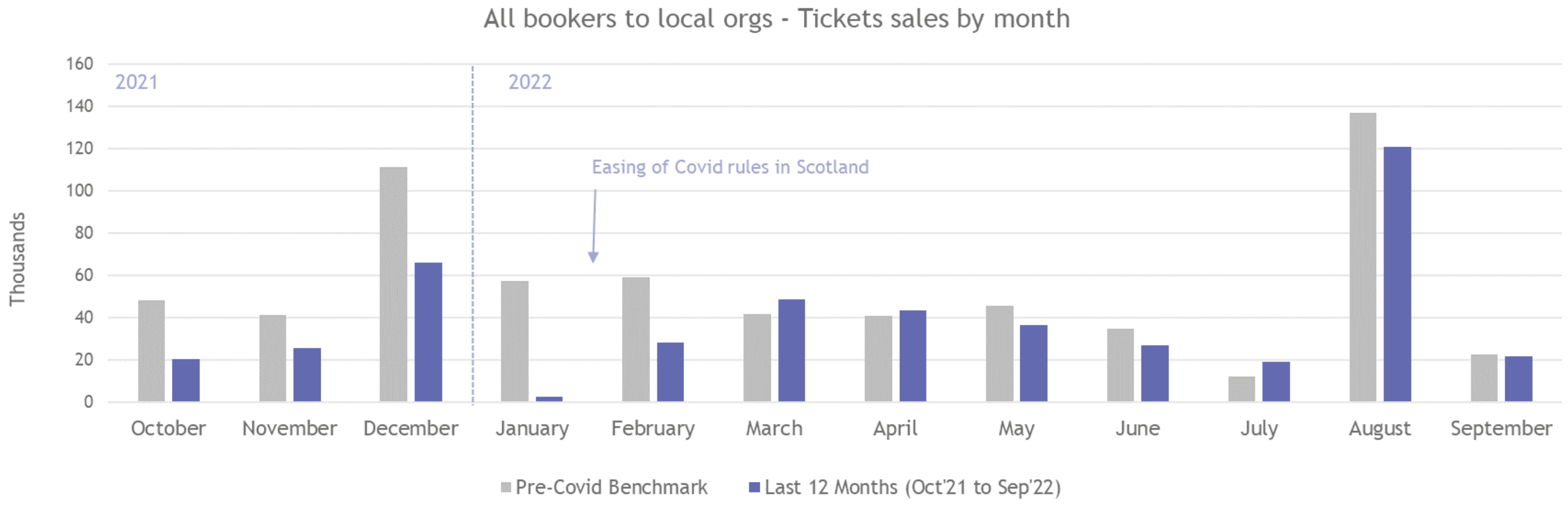
Change from Pre-Covid Benchmark - Profile

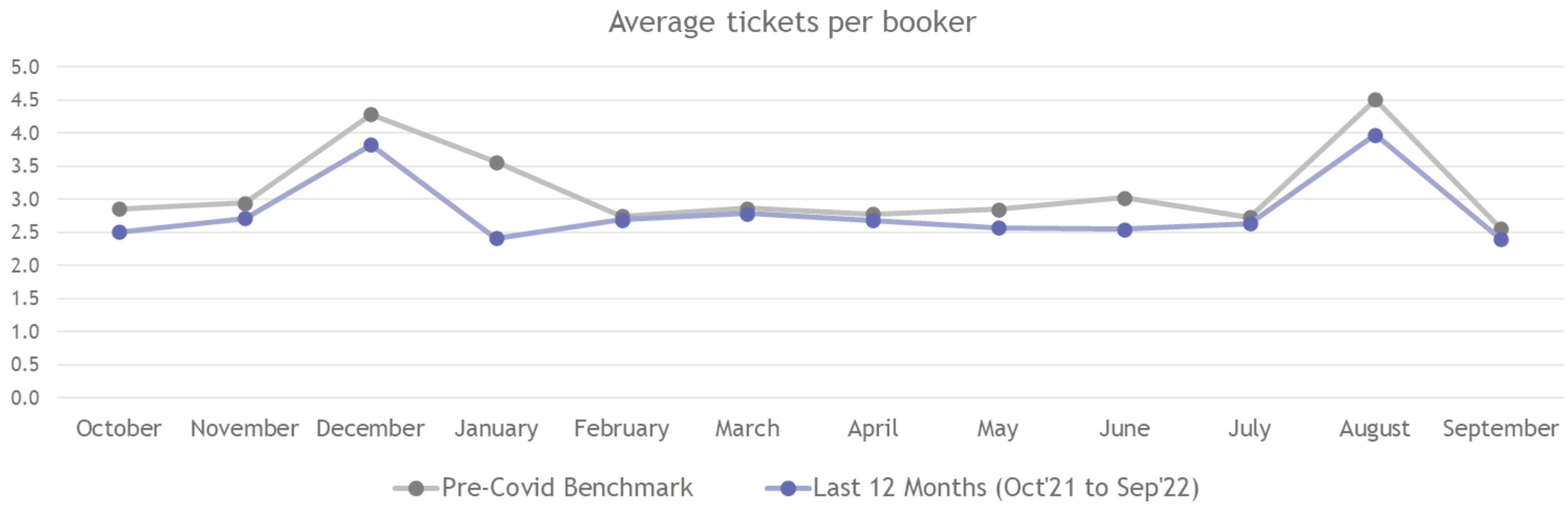


Change from Pre-Covid Benchmark - Tickets

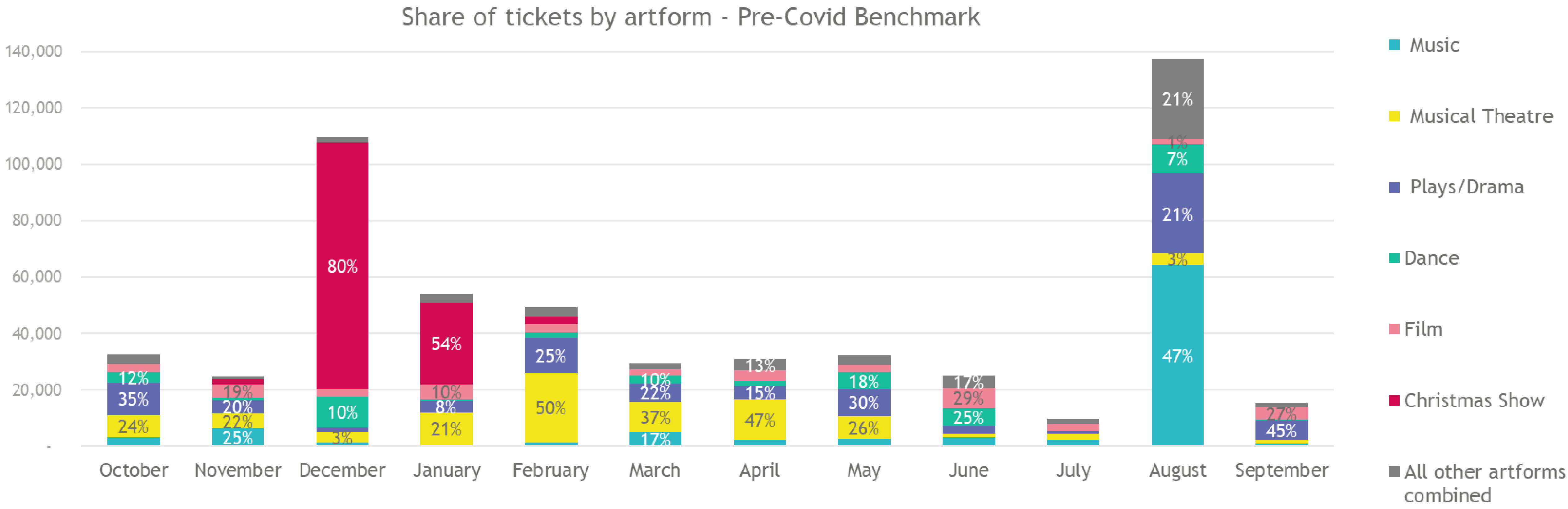




Local organisations – Latest ticket trends



Tickets by artform



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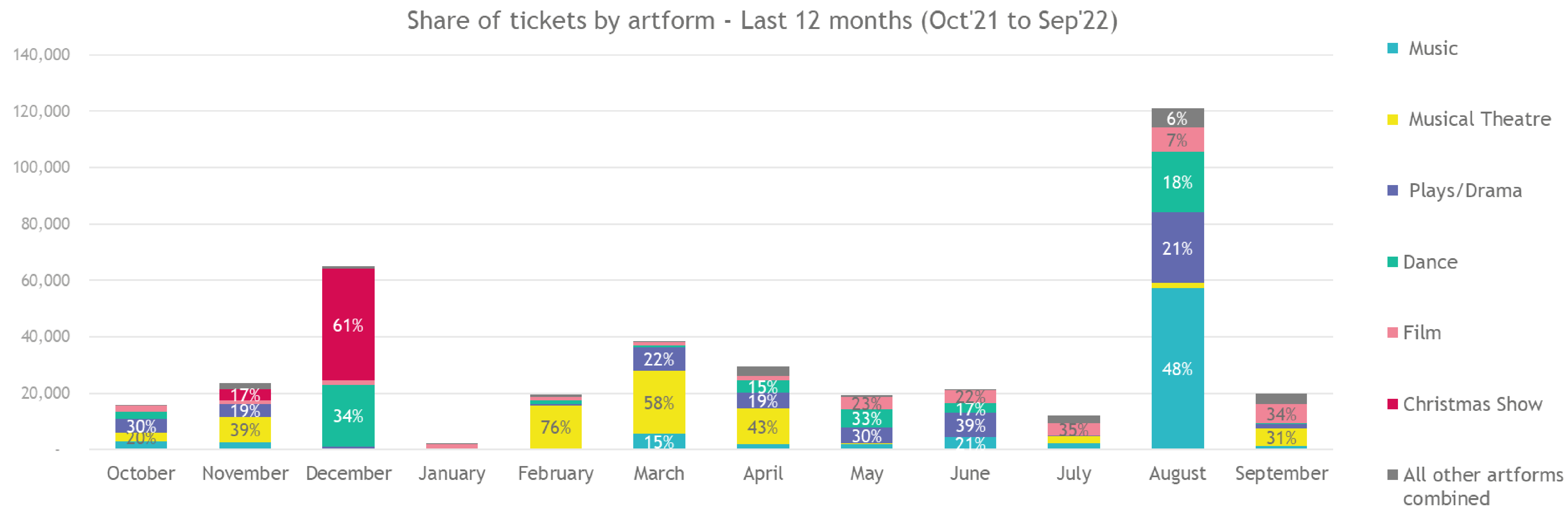
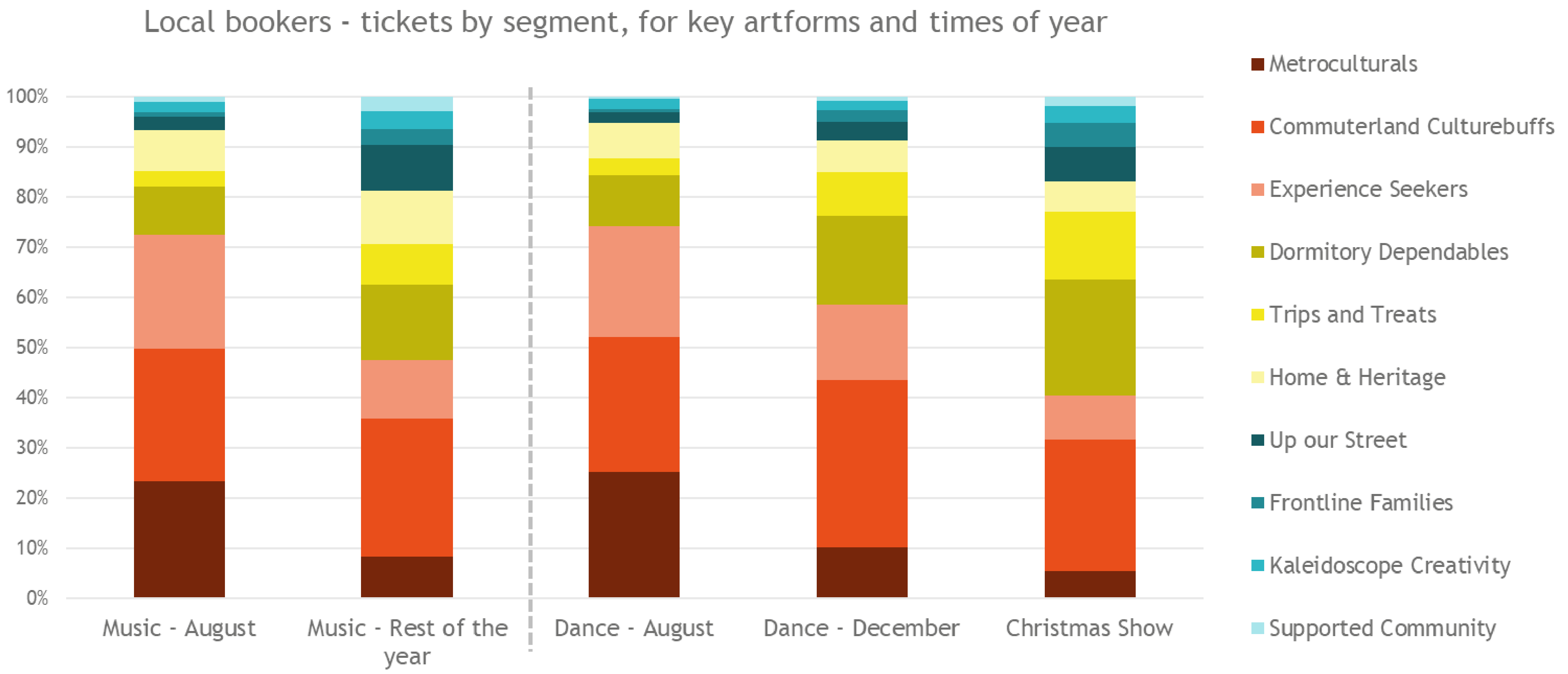


Tickets by artform – zooming in on key changes



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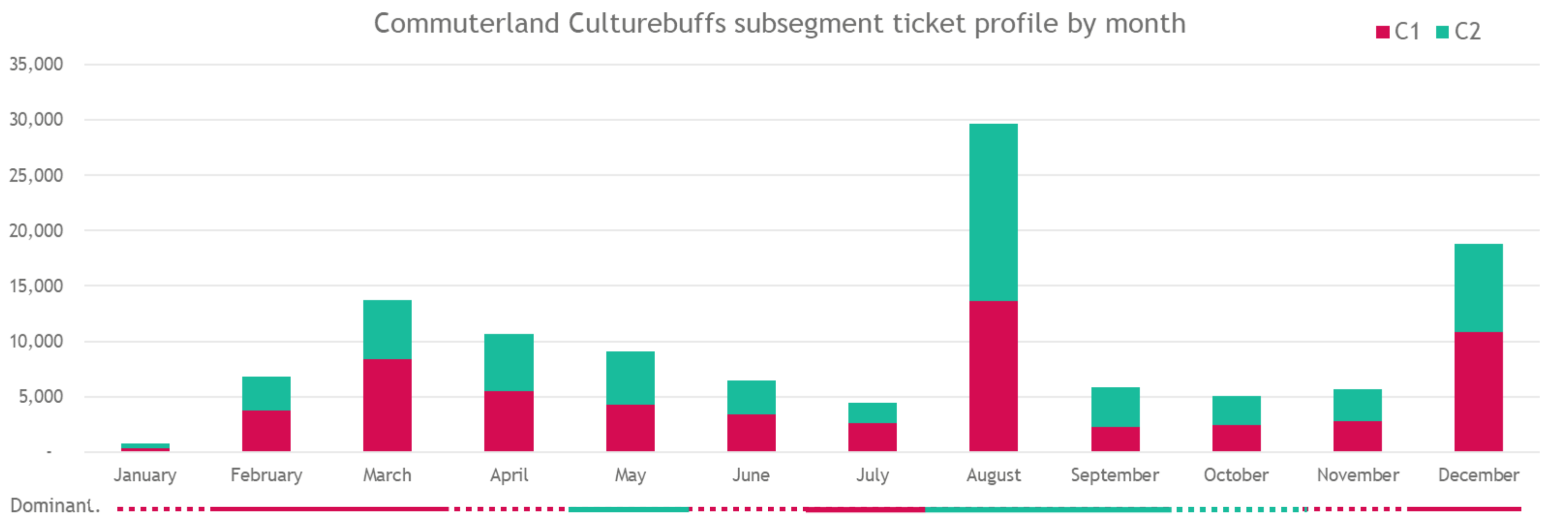
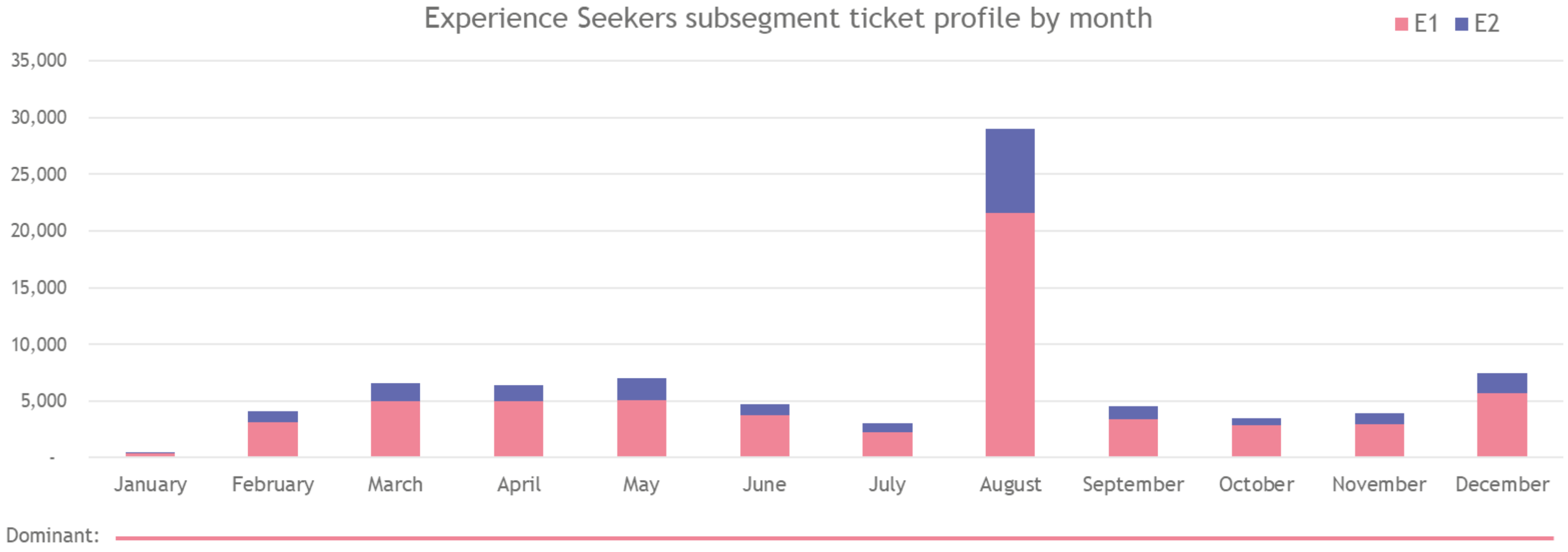
Key subsegments sales by month





What Else Can We Say About Local Audiences?

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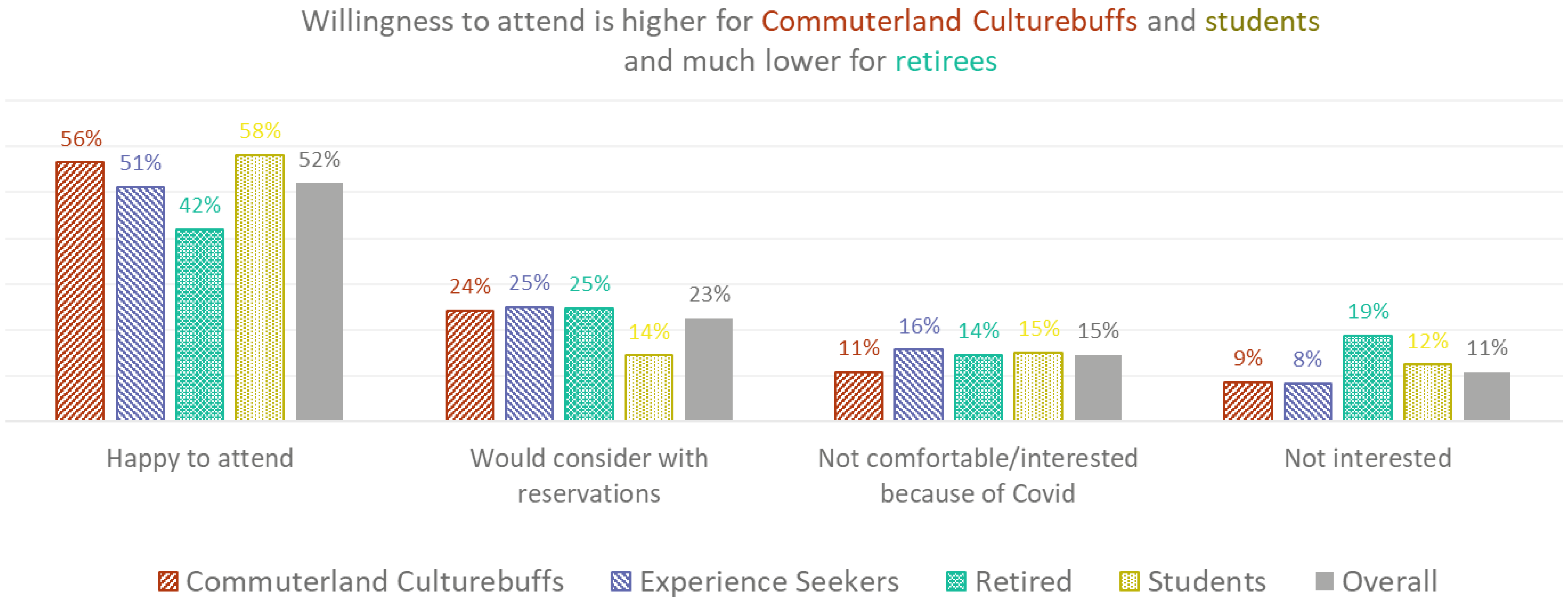
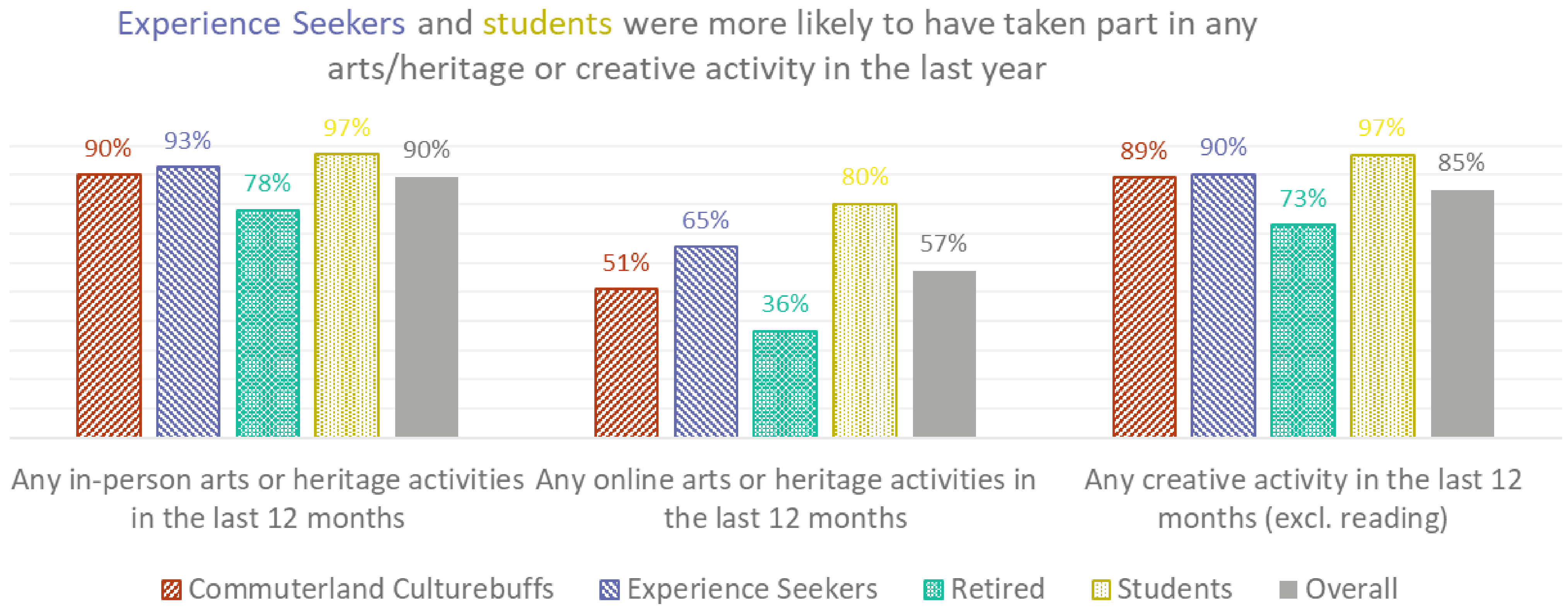
Insights from the Cultural Participation Monitor



Insights from the Cultural Participation Monitor



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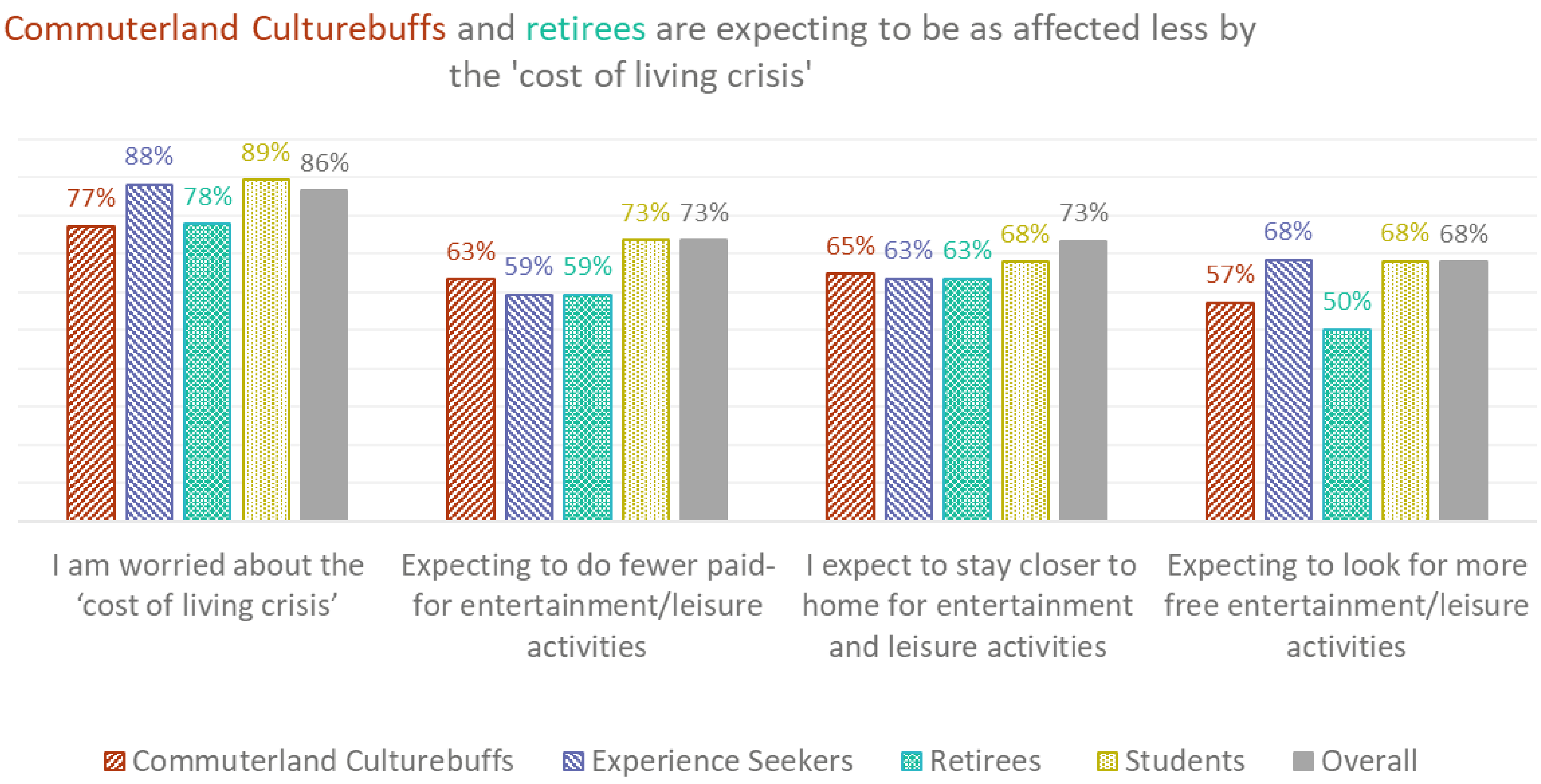

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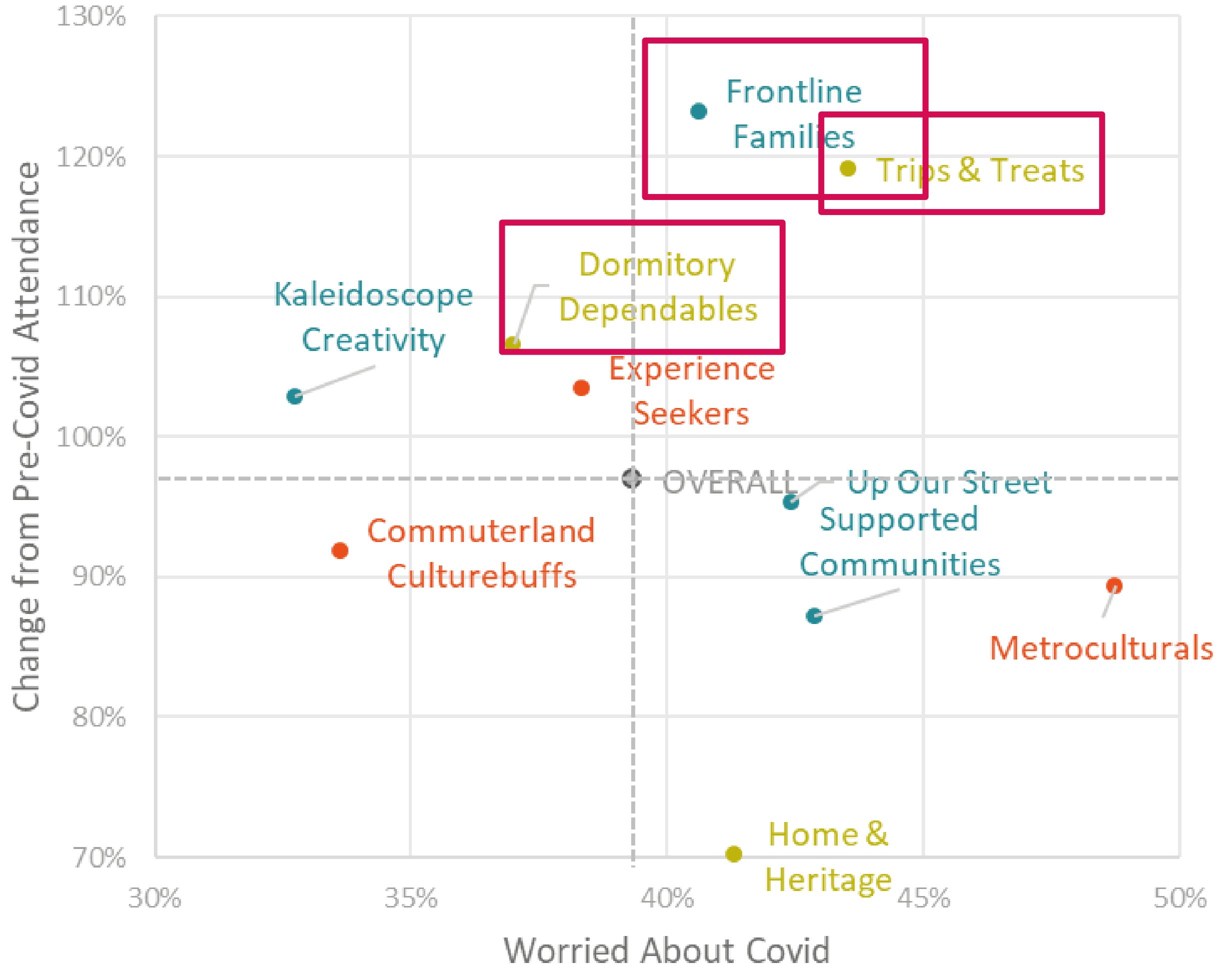
Attitudes re Attending

- Metroculturals are more likely to take a moderate approach with managing Covid-19: “try to reduce risks but not go too far” (45% cf. 39%).
- Commuterland Culturebuffs are most likely to think it’s time to ‘live normally’ with the risks of Covid-19 (32% cf. 26%).
- Experience Seekers are more likely to have booked to see a live show in the next few months (42% cf. 35%)
- Trips & Treats and Dormitory Dependables most likely to be happy to attend (both 58% cf. 52%).
- Younger people are more likely to have attended arts/heritage recently, as are families, the previously highly engaged, and those without disabilities.
- Scotland overall is mostly in line with national averages in terms of engagement - but more cautious about Covid-19

Effect of Cost of Living



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What Are the Implications?

In Conclusion…?

- Concentration of higher-engaged groups (but fewer retirees and families)
- Strong draw from elsewhere, but local audiences still key (big differences by month)
- Differing profiles linked to different attitudes to Covid/cost-of-living
- May raise the prominence of Experience Seekers (but NB cost) - as well as families (E1 subsegment key? Also opportunities for more engagement from lower-engaged groups?)

From the discussion:

- Many organisations are seeing a shift to more **last minute booking** – this used to happen for certain genres before but is now more widespread
- They are also seeing a significant drop in **group bookings**
- Many report that parts of the programming require more effort to sell than they used to, attendance patterns feel **less predictable**. Some events that used to be easy to sell are not anymore
- From the festival season: booker numbers from further afield and **overseas** held up better than expected

In Conclusion…?

- Is there more latent demand than is being programmed for? (is expectation of reduced demand a self-fulfilling prophecy?)
- Shift towards younger audiences: implications for programming…?
- Promising recovery so far, but strong dependence on two months (38%)

From the discussion:

- Sales for this **Christmas** season are looking on track, but bookings remain very **last minute**
- Some knock-on effects of the **cost of living crisis**: schools/after-school clubs used to subsidise panto tickets but this year can't afford
- Other effect: punters seem to be **prioritising** more which shows to book for
- Events that are selling better than they used to are either **big shows** that don't come around so often, or fun events with a **feel-good factor**

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

- NB Scottish version of the survey

Future:

- Audience Finder groups
- 'Know your community' free surgeries
- In Practice sessions
- Community Forum Live
  - Audience Spectrum (15/12)
  - Collecting Data Effectively (23/2)
- TEA Breaks (08/12 re Shops and Cafes & monthly)

Thank you

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

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