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Understanding the potential impact of The Factory on public engagement

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Contents

A. Summary

Arts Council England have asked The Audience Agency to consider what risks and opportunities a distinctive, new, large-scale venue and producing house might represent in terms of public engagement in Manchester.

An initial market analysis was conducted and submitted in September 2014, which demonstrated that there was an available audience and sufficient headroom for growth in the North West. Subsequently the Chancellor announced in the Coalition Government's Autumn Statement the plan for The Factory.

Our second stage study is designed to inform development of the initiative. It has involved analysis of attender data from existing venues in the North West and comparative research elsewhere in order to understand the audience profile. We also conducted interviews with a small sample of stakeholders and interested parties.

Opportunities

There is a shared belief that The Factory is an extraordinary opportunity to build new audiences and drive game-changing creative collaboration. By working together, arts organisations across the Northern Powerhouse could deliver an increased and enhanced audience. The evidence suggests that this is probably the case, although there are some particular pressure points which audience development and arts funding strategies will need to address. Opportunities expressed and explored are:

1. The Factory, with Manchester international Festival (MIF) modelled programme will attract new, more engaged audiences.
2. It will have an "audience agglomeration" or "Whitworth effect" with a positive effect on other organisations.
3. The cultural sector can benefit from repositioning Manchester.
4. The Factory can drive a common sense of purpose and collaboration.

Risks

People interviewed articulated a number of potential risks, with considerable differences of opinion as to their severity - many may be mitigable. Perceived risks might summarised as:

1. Competition for key audiences
2. The lack of availability of suitable product
3. The risk therefore of drawing product from existing venues and the displacement effects on other venues left with less commercially attractive productions
4. The necessary level of subsidy to sustain the proposed programming at The Factory for an extended year-round period

Conclusions

Our overarching conclusion is that The Factory represents an amazing opportunity for the Northern Powerhouse, but plans need to be in place to mitigate potential risks. Realising the opportunity will we believe depend on actions to meet four key challenges:

1. To reach new audiences from further afield and of a different profile
   - Focus on demand patterns
   - Development of a market-focused, combined offer
   - Investment in audience development strategies and campaigns
   - Collaborative platform to enable these developments

2. Realise the opportunities of uniqueness, scale and agglomeration
   - A sustained commitment to the ambition
   - Adequate public funding of the programme
   - Financial recognition including from HMT, DCMS – of The Factory's national role
   - Put pressure on the city and region to make the right level of investment
   - Realistic commercial revenue plan
   - Shared intelligence and strategy by the sector
   - Longer-led programming across the sector

3. Effect an unprecedented level of collaboration across the Northern Powerhouse
    - Foster willingness to co-operate about timing, territory, positioning and relationship
    - Encourage close involvement of the whole sector
    - Terms of engagement for collaboration
    - Consider resourcing a collaborative function

4. Mitigate the risks of genuine market competition
    - Careful, intelligent market and trend analysis
    - Contingency planning to address any displacement
    - Consider supporting some organisations to reposition
    - Strengthen support for large-scale touring production

B. Introduction

Arts Council England have asked The Audience Agency to consider the risks and opportunities a distinctive, new, large-scale venue and producing house might represent in terms of public engagement in Manchester. This analysis builds on an earlier exercise, and draws on three main sources of information to examine potential impacts proposed by stakeholders.

Context

The Audience Agency was asked by Arts Council England to provide a market analysis to feed into a more detailed feasibility study for a major new venue in Manchester sitting at the heart of a new development in the city. An initial report was delivered in September 2014 based on population and investment data as well as audience data gathered from venues across England through The Audience Agency's Audience Finder programme. In October 2014, Chancellor George Osborne announced, as part of his autumn 2014 budget statement, investment in the new cultural facility to be called The Factory.

This phase 2 analysis explores in more detail the opportunities and risks originally identified in order to help The Factory and other stakeholder organisations in and around Manchester best understand and collectively plan to serve the marketplace in the most effective and mutually beneficial manner, as plans develop.

In phase 1 we had little opportunity to gather and reflect the expert views of stakeholders in the region, their peers and collaborators. Phase 2 seeks to engage the sector more fully in this exploration – this report includes the views of a sample of stakeholders and representatives of North West organisations who took part in a discussion on 27 April 2015.

The Vision

The Factory Manchester is imagined as a new kind of large-scale venue that captures the extraordinary creative vision of Manchester International Festival (MIF) with the partnerships, production capacity and technical sophistication to produce inventive contemporary work year-round as a cultural counterweight to London. It is seen as an opportunity to promote cultural innovation, growth, skills development and talent retention across the Northern Powerhouse (Liverpool, Manchester and Leeds).

The Factory would include a 2,200 seating area joined to a large-scale multi-purpose space, able to transform from a traditional sit down theatre to a more flexible standing audience environment or exhibition space. The current sample plan assumes its operation for approximately 39 weeks, with ten weeks for hires, three weeks for education and one week for maintenance. Although the programme described is genuinely multi-artform, current plans show a split in the 39-week programme between 23 weeks (majority evening) performance and 15 weeks (majority day) exhibitions. Hires will be to arena-scale events like rock concerts.

It is a project of huge ambition, conceived as part of a wider master plan for a cultural enterprise and production district, a catalyst for beneficial economic and social change. It will seek to drive economic growth by retaining creative talent and clustering creative industry, digital and HE partners around the facility to shift the arts ecology in England, producing new work that will enhance the UK's cultural reputation and output. Our brief analysis is not designed to test this wider ambition, but to suggest approaches to ensure that The Factory flourishes as a public offering at the centre of such a vision.

Scope of this analysis

Our specific brief then is to describe, as best we can, the available audience for The Factory, and the implications for Manchester:

- On local people and the potential for greater access
- On the cultural landscape and in particular other Manchester venues
- On potential co-producers and creative collaborators
- On perceptions of Manchester and capacity to lever resources (to a lesser extent)
- On the financial viability of this kind of co-producing/co-presenting from a market perspective

Working with Arts Council England and other stakeholders we identified a number of particular stress points and comparative situations and drew together data to illuminate these. We have therefore concentrated our analysis on:

- Audience data for Manchester International Festival, as the best blueprint for The Factory programme, and therefore to indicate the profile of potential audiences. Much of the detailed analysis refers to aspects of MIF programming.
- Audience data at other large-scale North West performing venues to understand audience profiles, potential and competition issues

- Data from blockbuster exhibitions in London and North West, to indicate potential or competition for daytime visitors
- Research and analysis already carried out among Manchester museums and galleries
- Audience data for comparative London and Edinburgh venues, for rough indications of how audiences behave in cultural capitals, and issues of supply and demand.

We have again used the data in *Audience Finder* supplied by venues across England augmented with specific research. This data has been augmented by qualitative data from informal telephone interviews with a number of peers, listed in appendix 1.

Although we have had access to The Factory's plans, this is no way a critique or assessment of them – this was neither in our brief, nor have we had access to sufficient business planning information for that purpose.

Predicting impact

This exercise should help anticipate the impact of The Factory but we note that no analysis of the past can accurately predict the future. This is especially so for an endeavour of The Factory's scale and ambition.

We note that it is common to underestimate the market prior to creation of new quality cultural opportunities and there are many examples of how initial concerns are misplaced with the majority of new large-scale ventures in recent years exceeding audience expectations, both for the venues concerned as well as their neighbours in the cultural sector.

Deeper research into the impact of other examples was not part of our brief, but we observe that while net audiences grew around them, there were losers in the wake of these new builds due to other more subtle and complex displacement effects - not audience impacts, but problems of available quality productions.

Without precedent

There are simply no direct comparisons for a 4,000-capacity international-contemporary player rooted in the North West offering a mixed visual and performing arts, day- and night-time offer. Indeed, there are few precedents for a year-round programme of large-scale international work on currently available UK levels of subsidy, and no obvious model for the kind of flexible space proposed or the business model to accompany them. These

factors make this exercise even less “scientific” than it might be for a more conventional proposition.

However, Britain’s cities lag behind many in Europe in terms of the adequacy of major venues with flexible facilities. Clearly, The Factory would provide a contemporary building able to meet the advanced needs for innovative productions and exhibitions which are unlikely to be staged elsewhere. This could put Manchester in a UK league of its own.

Also without an obvious precedent is the mixed programme. In aspiring to attract top names in dance, theatre, visual arts, film and classical and mainstream popular music - to enable new forms to emerge by cultivating inter-disciplinary collaboration between them - The Factory will be creating an extraordinary choice of offering and an unknowable capacity to develop new audiences. What we have done is to describe the audience profile and dynamics for the current MIF programme.

Framing the Challenge

The challenges we hope to illuminate are:

- To reach new audiences: from further afield and of a different profile
- To realise the opportunities of uniqueness, scale and agglomeration
- To effect an unprecedented level of collaboration across the Northern Powerhouse
- To mitigate the risks of genuine market competition
- To avoid potential displacement effects in terms of programming and resources

To do so, we have explored a number of the opportunities and threats either prompted by consultees or by data analysis.

C. Opportunities

It is worth saying as an overview that no one doubts the opportunity The Factory represents, nor the likelihood that it will stimulate an increase in audiences across Manchester. There is also a consensus that it will be the catalyst for the creation of new work of new and distinctive varieties, and of new collaborations between arts organisations regionally, nationally and internationally. There is support for more international standard and original work in the UK. This is a development MIF is seen as ideally positioned to lead, especially equipped with a new and uniquely adaptive facility. Beyond the immediate opportunity for The Factory as a venue, people agree that there is significant value in getting behind a cultural beacon at the centre of a rebalancing of the national economy. It should help to leverage influence, visibility and additional resources.

Opportunities expressed by stakeholders include the following:

1. The Factory, with MIF modelled programme, will attract new and more engaged audiences.
2. It will have an "audience agglomeration" or "Whitworth" effect, with a positive effect on other organisations.
3. The cultural sector can benefit from repositioning Manchester.
4. The Factory can drive a common sense of purpose and collaboration.

In detail:

1. The Factory, with MIF modelled programme, will attract different audiences

To summarise, the evidence suggests that The Factory will be able to draw culturally engaged audiences from a catchment area much larger than the Manchester norm, with a younger, committed "experience-seeking" profile. There is less evidence to predict the impact of collaboration with more popular arts in terms of building audiences new to the arts. There are also clear but untestable opportunities to engage the rising generation of digital natives, and most significantly, to re-engineer tastes and levels of engagement among audiences.

Assumptions are considered in detail below.

1.1. Audiences new to the arts

The analysis does not suggest that audiences for MIF's ticketed events are newer to the arts than the norm[1]. In fact, MIF attracts a higher number of "highly engaged" audience types (49%) than most other organisations in Manchester (36%). The comparison is particularly acute with Audience Theatre Group's (ATG) audiences (26% highly engaged), the great majority of which are drawn from middle-engaged groups. It is important to recognise that MIF draws heavily on a highly-engaged, arts-confident audience. Supporters like these will be important in building the reputation of the new organisation.

Analysis clearly demonstrates the reality we see in many other data sets: that the more experimental and innovative the work is, the more likely it is to attract an established, arts-confident audience. This is borne out by the audience profile for the *Only at MIF*[2] programming strand. However, the slightly more mixed profile of the *Prodigal NW* strand makes the case that innovative programming with strong local associations can reach out to less hardcore arts consumers. MIF is very much in line with its comparators in terms of lesser engaged audiences.

1.2 Younger audiences

It is true that MIF audiences include many more people in the younger profile groups (in particular the engaged Audience Spectrum[3] *Experience Seekers* group). This is the most notable difference between the MIF audience profile and those of all performing arts comparators.

1.3 More diverse audiences

As we observed in phase 1, MIF audiences span a variety of audience profiles. On closer inspection, this is more true of the strand of work we have called "*Made in Manchester*", and less so for the categories *Only at MIF* (contemporary/experimental) and *Classics*. The

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[1] Ref The Factory brief: *The driver for the artistic vision for The Factory should be about using unique product to expand audiences, by broadening the numbers of people choosing to attend arts events…*

[2] For the sake of this analysis, MIF programming was divided into a number of distinctive programme strands which appear to attract distinct audiences; for a full explanation, please see the descriptions on page 34

[3] *Audience Spectrum* is TAA's segmentation of the population based on people's propensity to engage with culture, and their arts interests and behaviours. Full information audiencefinder.org/spectrum

MIF audience looks considerably more mixed (across Audience Spectrum groups) than those of other large performing and visual arts venues.

We do not have access to reliable data about the cultural/ethnic diversity of MIF audiences, and there are no reliable benchmarks. Again, the *Experience Seekers* group is composed of people with varied cultural backgrounds; however, MIF have reported that the cultural diversity of their audiences increases with programming which particular cultural communities identify with[4].

Qualitative research from the Africa 05 season confirms that high-profile work which specifically explores identity and celebrates or illuminates different cultural traditions has the power to generate more ethnically diverse audiences. This is beyond crude assumptions that the ethnic origins of an artist are in themselves a draw for people who share those origins.

1.4 Drawing audiences from further afield

Analysis demonstrates that audiences for MIF are willing to travel greater distances to see high-profile and unusual work. 19% come from beyond a 90-minute drive-time, compared with 14% for the Manchester benchmark. As anticipated, the work with largest catchment is the *Contemporary – Only at MIF strand* – attracting a quarter of its audience from beyond the 90-minutes' drive-time, mostly in the aficionado categories.

Unusually for Manchester venues, a significant proportion of this 90-minutes + audience, especially for *Only at MIF*, come from London. It is hard to know whether this is an effect of a time-limited festival attraction, or whether it could be sustainable year-round for offers with requisite rarity factor.

ATG's data shows similarly expansive catchment areas for blockbuster productions. Interestingly, ATG's Manchester venues have significantly expanded their catchment across the greater North area with a major change in programming to higher profile blockbuster productions, though this is true only for genuinely household-name productions like *The Lion King*. This is something of a change in strategy as traditionally the Pennines have been seen as a physical barrier for audiences; ATG and MIF have now demonstrated that they can attract audiences from further afield. If The Factory sets out to reach audiences

[4] *When international work is targeted at specific audiences (EG Abida Parveen, Nikhil Chopra or We Face Forward) the proportion of BAME audiences exceeds the population proportions by more that 50%, representing a very different demographic for MIF…* from The Factory Briefing

further afield, especially from Liverpool to Leeds, increasing going-out opportunities, how might that affect the existing venues in terms of their core audience?

1.5 International Audiences & Cultural Tourists

MIF reports that major international stars attract international audiences. Although The Factory will spearhead the development of a major cultural tourism offer, in the short-term expectations of the international market should not be over-ambitious. The significant differences in international traffic through London and Manchester are demonstrated by museum analysis – recent analysis shows large-scale exhibitions in London museums and galleries attract 34% international visitors, but North West museum and gallery figures are 10%.

1.6 The Factory will engage the digital natives of Generation Y

At the moment, the profile of digital native audiences interested in creative experimentation are exclusively in the higher engaged groups, with *Metrocultural*s dominating and *Experience-Seekers* some way behind[5]. This must of course change over time but at the moment the audience for this work is quite narrow and relatively small and, for the foreseeable future, we would have some concerns over the sustainability of the market for large-scale, complex digital art experiences.

However, a link with genuinely mainstream popular culture could buck this trend. There is extensive evidence[6] that visible links to high-profile pop culture build bridges to non-arts-specialist audiences.

Public screening of live events (performance and exhibitions) are, however, reaching huge numbers, most drawn from mainstream audiences. Recent analysis of audiences for NT Live[7] certainly suggests a huge appetite for public screening of high-quality branded performance. We were able to demonstrate a net audience development effect within London, where screenings have a positive effect on the numbers of live audiences. Evidence of a similar effect – or indeed, the opposite displacement effect – was inconclusive outside London. We have formed an untested hypothesis that screenings work because they are a simple, easily-communicated proposition that helps people access a

[5] TAA Panel survey 2014: Digital habits of the Audience Spectrum

[6] Not For the Likes of You research, www.culturehive.co.uk

[7] TAA analysis with NESTA in 2014

national brand or must-see event. It may be useful to consider that both the simplicity of the offer as well as the iconic brand are key to success.

1.7 The Factory will encourage occasional attenders to become more frequent

As we usually discover when analysing the actual behaviour of arts attenders, the frequency of attendance across Manchester is low at an average of 1.7 visits per booker per year for all venues in Manchester[8]. Is there an opportunity to increase frequency of going out by increasing the range and choice of offer? We usually approach considerations of viability by asking whether there is sufficient available audience but rarely do we ask, given the available audience, what provision do they need? Could The Factory, with its flexible format and approach to producing, respond dynamically to this question, also taking into account the availability of other product in the catchment at any given time? Realising this opportunity requires not only a significant focus on audiences and high-quality audience intelligence, but on ground-breaking levels of co-operation.

1.8 The Factory will act as a driver for growth of a new profile of highly engaged audiences

One of the key distinctions identified of the MIF audience is the comparatively high proportions that it attracts of the most culturally engaged *Audience Spectrum* groups, *Experience Seekers* and *Metroculturals,* even though they are a small proportion in numbers of the currently available audience. Typically, these two segments are amongst those most likely to be attracted to contemporary, experimental and international work - a third of MIF's audience is comprised of them. However, they are not well represented in the immediate North West catchment area and significant proportions of these *Metroculturals* and *Experience Seekers* are amongst those being drawn from farther afield.

At the moment, Manchester and the North West have relatively low levels of the arts 'super-engagers' we have defined as *Metroculturals*. We do not clearly understand yet the mechanisms by which the cultural offer either merely attracts and engages certain kinds of people or the cultural offer creates tastes and interests in people which changes their public profiles. It is probably the case that the number of *Metroculturals* in the community is both a reflection of the socio-economic profile and the available arts provision in range and character. Whichever, *Metroculturals* are enormously important supporters of culture

[8] *Audience Finder* Manchester cluster benchmark frequency of bookings/booker 2012/13 year.

– persuasive advocates, active participants, knowledgeable critics and vocal campaigners. Their sense of identity and community are shaped by their cultural experiences.

Over time, we might assume The Factory could help grow this kind of audience in the region, stimulating an indifferent market with must-see experiences, gradually introducing choice, raising expectations and encouraging new arts behaviours. The net effect could be that of generating an energising potential new audience for all the cultural stakeholder organisations in the North West that are predisposed to engage with them. Managing the "Whitworth Effect" described below may be the key strategy.

2. The Factory will have an "audience agglomeration" or "Whitworth" effect

Many people we spoke to talked about The Factory enjoying the "Whitworth effect" to sum up what has recently been observed in Manchester with the re-opening of the Gallery. Done well, the theory goes, the high-profile opening of a prestige new venue puts it in the spotlight, creating an enormous buzz and visibility which generates much larger audiences than anticipated, not just for the venue itself but importantly for its neighbours. Ideally, this effect does not diminish over time so much as transform, as the venue is repositioned as a major attraction in a destination rich with other cultural offerings and local treasure.

2.1. A net increase in audiences in Manchester/North West

People have suggested, for example, that The Factory is likely to have the kind of game-changing effect that Tate Modern had in London in 2000 when anxieties about competition for smaller galleries rapidly melted in the heat of unanticipated demand. It was inconceivable that within a few years a modern gallery would be topping the national visitor attractions league. Similarly, The Lowry[9] and Wales Millennium Centre boosted net audiences in their regions despite anxieties. Turner Contemporary, The Hepworth and The Whitworth have all drawn unprecedented crowds to venue and location. On the other hand, we can also point to less successful ventures (The Public, First Sight), though these were sited in locations with severely-restricted market potential using the measures employed in this analysis.

We have not undertaken any deeper research into the impact of these examples, but note that achieving a net increase in audiences for a city seems to be the rule rather than the

[9] The original Lowry pre-opening business plan was viable based on it taking 1 in 7 of available attenders in the projected catchment area in the North West; it is generally credited that instead the number of attenders overall increased.

exception. This is a useful message: that increased investment in culture effectively grows the market, which in turn leads to increased footfall in the city (and associated economic benefits).

Clearly, there is a lot to get right. The skill and resources needed to launch and sustain a landmark new organisation cannot be underestimated. A number of those consulted referred to the large marketing budget deployed for MIF to make both a national and international impact. Media coverage then reinforces this high profile and there is no doubt that visibility stimulates engagement. The investment in the facility and programme needs to be matched with suitable and sustained marketing and communications budgets.

2.2 The Factory could drive other organisations to differentiate and reach new audiences

Section 2 of this report shows that there are areas of the North West where there is potential to build new audiences –either because there is a low level of market penetration in an overlooked area where it should be high, or because the needs of certain profile audiences are overlooked. We understand much more now about the hooks and barriers for different audiences and The Factory could precipitate a closer focus on these. Again, good intelligence and high levels of co-operation are probably required to make this a reality. We talked at the consultation session about organisations collaborating to create routes in to the Manchester/ North West offer for less confident and/or aware potential audiences. There may be a need for new offers and forms of communication to be developed, with some organisations repositioning accordingly.

3. The cultural sector can benefit from repositioning Manchester

Newly minted as Britain's "second city", Manchester is leading the Northern Powerhouse bid for a better slice of the Government funding pie, and the City Council is using culture to spearhead regeneration. This is clearly an opportunity for Arts Council England and Government to start a regional rebalancing of investment in the arts in England. The question raised was: what steps should the sector take to benefit?

3.1 A strong cultural ecology

Everyone is united in belief in the potential and the opportunity to leverage new resources to the city, the region, and the cultural sector. The Factory is intended to symbolise the values of the city and amplify its positioning as an attractive place to invest, live, work and play, and as a destination for visitors and tourists.

The Factory will have a major part to play, significantly increasing the quantity and range of cultural experiences on offer and, with others significantly expanding quality-of-life perceptions, the brand and image of the city, and economic impact of "going out". All agree the need for the cultural sector to leverage maximum returns for playing this role. Capital funds for a new building however amazing will not in itself be enough. If The Factory's programme is to live up to ambitions and not become just another touring house, it will require revenue. But The Factory is just the flagship and some expressed the view that the whole fleet - from new venues like HOME and the Whitworth, to those long established - will require more support to take on this responsibility. The Museum of Science and Industry (MOSI) anticipates potential for ground-breaking programme collaboration with their new neighbour.

In the knowledge that Arts Council England funds will remain tight, people also recognised that The Factory as flagship might play a significant role in unlocking other forms of investment for the whole sector by returning demonstrable social and economic benefit through a magnetic new metropolitan identity.

Again there was a consensus that standing together in making the case for increased investment was likely to be much more powerful than competing for it.

3.2 Re-positioning St Johns

There is enthusiasm for The Factory to re-shape this neglected area of the city, both in a literal and figurative sense. Creating a new, vibrant cultural quarter at the heart of economic regeneration is already lending the city a new personality and signaling its creative aspirations. As potential neighbours, MOSI anticipates increased footfall, establishing the area on people's mental map as cultural quarter. This will require sensitive design of the public space "*both around Factory and Museum outdoor spaces – in tandem, thinking about permeability; how people move through the spaces will be crucial*". Making the ground floor of The Factory lively and open in the daytime could be make or break in terms of making St Johns a real destination[10].

3.3 Cultural Tourism

[10] MOSI also note the importance of planning use of ancillary spaces – from conferences to car-parking – in a complementary way, not least to minimised negative effect on their commercial activities.

A number of people mentioned the potential for The Factory to build Manchester's reputation as a visitor destination (Bilbao Guggenheim style) in the domestic and international markets. While it should not be overstated[11], there is clearly considerable potential for growth in tourism from the enhanced offer, though this is unlikely to be driven by cultural tourism alone. The Factory and partners will need to build on a strong tradition of working with the wider tourism sector in Manchester, to create a destination brand with culture at the centre rather than trying to promote a cultural offer independently of the city's other tourism assets.

3.3 Cultural counter-point to London?

A view frequently expressed was that London is "too crowded": too complex for tourists/would-be audiences to navigate, too expensive for an emerging generation of artists, and too aggressively competitive in the cultural sector. The Factory is generally seen as the rallying point for Manchester to challenge London's dominating position, making more interesting work and drawing the attention of the best emerging and established artists and producers and other creatives in their wake. This analysis is nowhere near deep or sophisticated enough to understand this effect so we note only two caveats: firstly that organisations in Manchester will require the wherewithal to compete with London on a sustained basis, and secondly that the Manchester catchment area in the North West has far fewer residents that fit the profile of London's most active and engaged arts audiences and supporters. Clearly, this is a chicken-and-egg situation – cultural organisations need more graduate-level professionals but also have the power to attract them.

3.4 Raising the bar

People we spoke to all felt that MIF moving to programme The Factory for 30 or more weeks a year will raise the bar in terms of the quality and range of work on offer and develop the aspirations of audiences in the cultural sector. As one consultee put it, the pressure will be on all in the North West to "stay brilliant" while others around the UK may need to look to their crowns. There was also a sense that The Factory is what is required to put England on the global map as a serious international collaborator, though this assumes there would be large budgets on the table for co-producing.

[11] Only XX% of all international tourists visit Manchester and North West

4. The Factory can drive a common sense of purpose and collaboration

In the current plan The Factory "*would develop its programming ambitions and artistic direction in dialogue with other organisations and institutions in the region, such that the ecology of the region is considered alongside the needs of any individual institution. This dialogue should, ideally, be formalised and regular and conducted by a cross-sectoral group of arts organisations*".

Most people embrace and welcome this idea. The level of co-operation between cultural organisations in and between Manchester and Liverpool is already very high, while the scale of the sector creates ideal conditions for collaboration: not too big to be unmanageable (like London) nor too small to have clout. The weight of evidence suggests that organisations are not in competition with each other and that by working together they can help the market to continue to grow. This will be especially important at the large-scale, including The Lowry and the commercial sector: ATG and Live Nation.

Many of the opportunities explored in this section will require them to reach new, unprecedented levels of co-operation including long-lead collaborative programming, joined up audience development, destination marketing, etc. Interestingly, at the group discussion it was clear that, generally, cultural leaders in the region are not only committed in principle but see themselves as ideally placed to effect such a step-change.

Although a common will and shared vision are essential to collaboration, active delivery of needs to be backed by resources human and otherwise. Many ideas for game-raising collaboration were mentioned: large-scale campaigns, long-lead schedule co-ordination, longitudinal work with low engaged groups, and multi-site festivals. All would require facilitation and either additional or redistributed resources, especially in the establishment phase. Collaboration of this sort – as we have seen elsewhere – makes no economies but can be a very worthy investment.

There was, however, concern from some – not just representatives of Ambassadors Theatre Group and The Lowry - that consultation to date had happened out of sequence and that this was perhaps indicative of the commitment to collaborate. Those organisations with considerable experience and managerial skill in running venues could have expected to be consulted by both MIF and the City Council at the start of the process, particularly given the past experience with the Royal Opera House project for East Manchester.

Going forward, the project would benefit from a shared synergy of ambition for the cultural offer in the North West, and this would serve to strengthen the foundations for collaboration.

D. Risks

We noted a number of potential risks following the initial analysis, particularly referencing competition for specific audience types and for appropriate product. We also articulate here issues raised by interviewees.

The challenge referred to by everyone is the necessary level of subsidy to sustain the proposed programming for an extended period of the year, the high risk of drawing programming from existing venues (the outline MIF programme already includes work previously seen at The Lowry), and potential displacement effects if programming is drawn away from venues and replaced with less commercially attractive productions. That level of subsidy will determine whether MIF can extend its co-commissioning and producing role to 30 weeks of the year to retain the unique character of its work in the UK.

People interviewed articulated a number of potential risks with considerable differences of opinion as to their severity. Perceived risks might summarised as:

1. Competition for key audiences.
2. The lack of availability of suitable product and the risk therefore of drawing product from existing venues and the displacement effects on other venues left with less commercially attractive productions.
3. The necessary level of subsidy to sustain the proposed programming at The Factory for an extended year-round period.

1. Competition for audiences across the North West

Summary

We have noted that there should be enough headroom for a new venue but there are some specific pressure points including: preferences of a large proportion of potential audiences with relatively conservative tastes; competition for a small number of *Experience Seekers* with contemporary tastes; and competition for super-attenders who account for high proportions of revenue.

Detail

Our initial study suggested that Manchester has a relatively low proportion of seats per capita, though we did not undertake a similar exercise for exhibitions (we note that the number of publicly funded galleries per capita is drastically lower than London). We also

note the positive impact of major new facilities in recent years. In our earlier study, we also concluded that net decreases were also unlikely in Liverpool or Yorkshire. We have therefore taken as our starting point that there is generally enough headroom for a new venue of the scale of The Factory, but that the areas of competition are specific. Our detailed analysis focused on Manchester venues but we can assume that the issues this identified may also affect venues in Liverpool and even in Yorkshire.

The areas of likely greatest potential competition[12] might centre on the local audience resident within 60-minutes' drive-time of Manchester (87% of The Lowry's audience and 77% of MIF's audience live within 60-minutes' drive-time distance). It is encouraging to note that the audience profiles of the different venues that draw audiences from the same catchment are distinct, showing different proportions of people from the *Audience Spectrum* segments, and marked contrasts between the profiles of The Lowry and MIF audiences. This demonstrates at least a degree of audience appeal specific to each organisation which may have a mitigating effect on competition for these audience groups.

1.1 Majority audiences in the immediate catchment area

The 60-minutes' drive-time catchment area is dominated by three segments: the highly engaged *Audience Spectrum* group; the *Commuterland Culturebuffs*, and those with some propensity to attend: *Dormitory Dependables* and *Trips and Treats*. These groups represent about 90% of potentially active audiences in the catchment, and 45% of total population (the remainder are in the lower engaged groups).

The risk to The Factory is around the fact that these significant audiences are not habitually attracted to brand new, contemporary style, less familiar, or more risky work and this is reinforced through the data analysis which shows them most actively engaged predominantly in the *Classic* types of event. The risk to The Lowry, ATG and others is that some of these moderately interested and infrequently attending groups which form a significant core of their audiences are attracted elsewhere to an attractive, new, high profile offer.

The development of ATG's programme offering (and the attendant marketing of it) targeted *Dormitory Dependables* and *Trips and Treats* with higher profile, broadly-appealing and commercially-focused offers of the West End style of product. It successfully offered precisely the right thing to the right type of audience in the right way. Whether

[12] Based on the analysis of audiences for MIF, The Lowry and ATG's events

the same market development can be achieved in these same audience groups through the high profile enhancement of the subsidised, more contemporary, offer planned for The Factory is a risk and is less possible to answer. This analysis demonstrates that there are particular event types that appeal more to these particular groups within the existing MIF programme and it will be important to reflect these preferences in programme planning.

Whether this alone would create enough appeal to develop the size of the local market amongst these audience groups is unclear – it would be necessary to both widen audience appeal and increase frequency of attendance. But it is at least equally likely that to develop the local market for The Factory on a sustainable basis the nature of the programme offering and the breadth of its appeal will need to more closely match the typical attending preferences of some of these averagely culturally active groups. This might run counter to the expressed artistic aspirations of The Factory but be necessary for audience development. And equally, if this means that more and similar opportunities are created for people to go out to arts and cultural events, ATG's experience suggests that this could result in a positive overall growth in the marketplace from which multiple stakeholders could benefit.

1.2 Competition for Experience Seekers audiences for new and difficult contemporary work

"MIF audiences are overwhelming likely to experiment with new art events"

This would indeed appear to be the case, the largest group of MIF attenders coming from the *Audience Spectrum* segments, *Metroculturals* and *Experience Seekers*. Only 9.5% of people living in the 60-minute drive-time area fit this profile (compared with 30+% in many parts of London).

The limited nature of this market for the contemporary/experimental could cause major challenges for other venues in Manchester when presenting new or more challenging work, which could drive a pragmatic conservatism in programming choice - directly counter to the strategic intent. None of the organisations we spoke to expressed concern about the overall size of the available audience in the North West but some did express concern about the need to develop audiences for more contemporary work.

In its biennial festival format, MIF provides an attractive time-limited window which is particularly attractive to this market, drawing many from farther afield for a short festival experience in Manchester. The effect is evidenced not only in MIF's greater geographical reach (which is most pronounced for the *Contemporary – Only at MIF* and *Club*) but also in

the higher overall frequency of attendance of bookers to MIF events over the duration of just a month, than is evidenced in comparison by bookers at The Lowry over the period of a whole year.

What is unknown is whether the same appeal for these groups can be maintained by a much less condensed, 30+ week all year round programme offering.

If this traffic could be maintained and developed, it would create considerable opportunity for other cultural organisations presenting contemporary work in the region.

This is then a volatile situation and the dynamics of audience flow will need to be monitored carefully, with Arts Council England and the City and North West arts organisations working together to understand the impact. In particular they should look for changes in audience profile and location, and the results of certain kinds of programming.

1.3 Competition for the most frequent "super-attenders"

There is also the risk that the available market of super-attenders is simply too small. A very small proportion of highly active audience types are shared between MIF and other venues such as The Lowry. Approximately, 8% of the most frequent attenders to MIF (i.e. more than three attendances per 100 people) are also among the most frequent attenders at The Lowry. The analysis shows that crossover is most likely to occur between audiences for the *Contemporary* and *Classical* programme strands. The question we have to ask is simple: just how much can we expect these people to attend in their busy lives?

There is good evidence to suggest that super-attenders are also the most active donors[13], with potential risks for the fundraising targets of individual arts organisations.

Again, swiftly identifying changes in trends by tracking super-attenders will be key to mitigating these effects.

1.4 New markets among less engaged audiences

Analysis suggests that some profiles among the population in the catchment area are significantly underserved, especially the medium engaged *Trips and Treats* and lower engaged *Facebook Families* groups – both groups with a high proportion of children and young people in their households. As The Factory shifts the balance of the cultural ecology in the North West, it may be both an opportunity and a risk mitigation for some

[13] TAA's recent Donor Finder research looking at donor cross over in Nottingham demonstrates real competition for membership and donation from super-attenders.

organisations to think about repositioning and developing new aspects of their offer/brand to speak more directly to these groups.

1.5 Paid exhibitions

We have undertaken very little analysis of audiences for paid-for exhibitions but note concerns raised at the consultation session that there is a limited market in the North West, given that current Government policy makes most major galleries and museums free admission. Tate Liverpool remarked on notable negative effects on sales when similar free exhibitions were available in Manchester. This concern demands more exploration.

2. The lack of suitable product & displacement effects

Analysis certainly suggests that Manchester can sustain more provision but does raise questions about the effects on programming in the existing venues. We refer here to large-scale touring productions as well as co-producers with the resources to collaborate at the relevant scale.

The shortage of quality touring product - especially subsidised work - in terms of opera, ballet and dance at the large scale, and the kind of RSC and NT productions that transfer to the West End or tour internationally is a core issue. If we look at the potential in the North West there is serious under-provision of the above, especially in Manchester/Salford. Compare the provision of opera, ballet and dance in London across SWT, Royal Opera House and English National Opera plus South Bank and the Royal Albert Hall.

One of the biggest issues The Factory raises is the need to have available more touring product at the large-scale for the North West's other venues. Arts Council England has a role to play here, not least as a catalyst for increased supply, and broker of greater collaboration between funded and commercial producers, venue syndicates, and commissioning.

Noting the success of The Lowry and the overall increase in audiences in the North West over time, the side effects from the opening of The Lowry on Manchester venues were on programming, with loss of work from the Palace Theatre and Opera House to The Lowry, and Live Nation giving up operation of the Tameside Theatre in Ashton (though the latter was not thought a particularly attractive venue to audiences).

The same argument was raised by the Ambassadors Theatre Group (ATG) whose principal concern is that they would face competition for productions and potentially for audiences from a new subsidised venue. ATG thought this was an immediate threat to the viability of the Opera House: primarily from the displacement effects of programming less attractive shows on a commercial basis, in competition with a subsidised venue, and where the range of choice for the audience has increased (including potentially more attractive shows at the additional venue).

It could be argued that there are already examples of these problems elsewhere, such as Edinburgh where the Festival Theatre was unable to sustain its programme model and quickly became a competitor for the Playhouse and Kings Theatres; or in Glasgow where the previously refurbished Theatre Royal was unable to sustain its programme model and became a competitor of the Kings Theatre, which then necessitated them both being put out to commercial contract operation. In both these cases, a major issue was the availability of affordable high standard lyric theatre productions and, in its absence, more commercial programming being necessary, though not always of the desired quality.

It is worth noting that commercial operation of both venues under contract was a favoured option in Glasgow since a current commercial operator of a venue could complain under EU regulations about subsidised competition with their operations, especially if the productions could equally have been presented in their venues.

In plans, the intention NOT to compete for product is clear:

> *The Factory will not programme standard lyric touring work that could be accommodated either at The Lowry or at the Palace Theatre (or other ATG venues)*
>
> *It will not bring in commercial lyric touring (Shrek the Musical; Priscilla: Queen of the Desert type) during the commercial letting period. Such work is better accommodated elsewhere in the city and would confuse the core artistic vision for the space*
>
> *It will not become the sole location for major touring companies that currently present work in other venues. As a working example, we would expect that companies like English National Ballet or Birmingham Royal Ballet would continue to take their touring work to either the Palace or The Lowry but that once every few years, when they wish to produce an entirely new piece of work, at a level of complexity that would require the support of The Factory (as well as other partners) that this work would be produced and presented at The Factory.*

The concern is that for all that this might be the intention, the reality is that this kind of programming might just not be possible and The Factory would then need to revert to more traditional programming.

For example, the Wales Millennium Centre has required a much larger subsidy than planned and had not succeeded with the intended level of international programming while also struggling to achieve viable audiences for its Christmas offerings in the first few years, with audiences proving loyal to the existing South Wales venues' Christmas productions.

This situation demands some assurances that it is not realistic or politically possible to make: a guarantee that The Factory is adequately subsidised so that it does not need to take programming from the Lowry or the Ambassadors Theatre Group and does not need to make deals for rentals and hires when such events could reasonably be presented in the existing venues (even if the producers think otherwise). In essence, The Factory is setting out an artistic policy which ignores market forces, with a concomitant level of subsidy, and the rest of the marketplace wants that to be confirmed and not to be the victims of the market forces which would otherwise inevitably apply.

3. There is not enough subsidy to sustain a level of non-commercial product

Intriguingly, it was potential partners outside the North West who referred to the challenge of the subsidy required, noting that MIF was already subsidised at a level that meant other UK organisations found it difficult to collaborate with them because they simply do not have the scale of budget that MIF has. Clearly a switch to more year-round projects might increase the potential for collaborations, especially where a production had been presented first at another festival - though MIF might be less interested in these. The Roundhouse, where their annual turnover is similar to the projected subsidy needed for The Factory, particularly referred to the challenge of limited funding from Arts Council England, meaning that the kind of international projects discussed were very difficult for UK organisations such as the Roundhouse, Sadlers Wells Theatre and others to participate in on an equal basis with those from other countries. Experience at LIFT, the Centre for Performance Research, and other festivals confirms that considerable specific fund-raising and sponsorship is needed to make individual international projects happen.

The Ambassadors Theatre Group and The Lowry had major concerns about the necessary level of subsidy and its sustainability by the Arts Council and Manchester City Council. The Cornerhouse put forward the view that, having committed to a project like HOME and now

The Factory, it seemed unlikely that Manchester City Council would not sustain the necessary level of support, although the future financial climate for arts funding could be a challenge in itself. Given that for The Factory this would likely be very high, the concern of the Ambassadors Theatre Group and The Lowry was how the business model would be effected by variations in the available annual subsidy. Criticality starts immediately at the margins.

Some also expressed concern that The Factory presents a very different form of business model than MIF, and that a year-round operation requires a different knowledge and skills base across the organisation. Venues might work together, it was suggested, to support The Factory in making this transition.

3.1 A failure of ambition

As a last word, a number of people mentioned a failure of ambition as one of the greatest risks. For it to realise seismic changes The Factory needs to maintain the bold creative vision of MIF – as one consultee put it *"the programme needs to stay high profile, distinctive and not run out of steam"*. The stakes of failing to do so are high, not just for an expensive capital project, but for the whole city and the Northern Powerhouse.

E. Conclusions

In summary, we would take the view that there are undoubtedly much bigger, wider audiences that The Factory the wider Northern Powerhouse could be reaching as a result of its creation. In the end, its ability to do so will very much depend on the way in which it is programmed, managed and funded. The way in which the wider sector needs to react will need to be coordinated, open-minded, collaborative, and in some ways very different from the traditional norm.

If there are people who sound like dissenters, let us be clear that there are many complexities as to how the future could work out for The Factory and considerable reasons to be concerned in relation to programming and audience development. There are solutions, but where these issues impact on the bottom-line for presenting venues they need to be addressed and fully understood. There are real concerns about the supply-side emphasis and the lack of business reality in how the commercial marketplace will insist on working.

Additional resources may be necessary short-term for other presenting venues in the North West to adjust to the impact on their programmes and retained margins, and Arts Council England and City Council will need to discuss how to make provision. Ideally, Arts Council England should play a role in ensuring the supply of high quality touring product to the North West and ensuring the viability of large-scale theatre programming at an enhanced production quality.

These opinions reflect those of the people we consulted and our own knowledge and experience.

How should The Factory and the sector respond to key challenges?

To reach new audiences: from further afield and of a different profile

- A careful focus on understanding and responding to demand patterns at The Factory and beyond.
- Development of a market-focused, combined offer.
- Investment in audience development and long distance marketing initiatives highly targeted on demonstrable market opportunities.

- Collaborative platform to enable these to develop.
- Investment in communications and marketing spend.
- Make collaborative audience development initiatives part of the overall business plan.
- Consider how to create a consistent, lively day-time experience sustainably.
- Realise the opportunities of uniqueness, scale and agglomeration.
- A sustained commitment to the ambition and innovation of the idea from stakeholders and partners.
- Adequate public funding of the programme at The Factory.
- Apply pressure nationally as well as on the city and region to make the right level of investment for the returns they hope to get.
- Realistic commercial revenue plan which reflect market characteristics and trends.
- Shared intelligence and strategy by the sector.
- Longer-lead programming across the sector.
- Bold creative leadership offset by strong financial direction.
- Maximise knowledge and experience of other building-based players.
- The wider regeneration of St Johns to create a rounded destination.

Effect an unprecedented level of collaboration across the Northern Powerhouse

- As a matter of urgency, a climate of collaboration must be developed, led by MIF and the City Council, across venues, arts organisations and local authorities.
- Foster a willingness to co-operate about timing, territory and positioning.
- Encourage close involvement of those most inclined to feel threatened.
- Create terms of engagement for collaborative working.
- Consider resourcing a collaborative function.
- Focus on: trends analysis, programming planning cycles, anti-clash, creative collaboration, joint advocacy, economies of scale, collaborative audience development.
- Cultural tourism offer – work with wider tourism sector.

- Involve regular collaborators (touring companies and co-producers) in long-lead planning.

Mitigate the risks of genuine market competition

- Careful, intelligent market and trend analysis to understand where true competition lies.
- Arts Council England to act as catalyst for increased supply of large-scale touring product.
- Contingency planning in the event of displacement effects.
- Territory agreements.
- Consider supporting some organisations to reposition.
- Explore further competition in the visual arts market.

F. Audience Analysis

The major part of this commission was to undertake a deeper exploration of relevant audience data and some secondary research which would help illuminate potential impact on the market place. An initial report was delivered in September 2014 based on population and investment data, as well as audience data gathered from venues across England through The Audience Agency's *Audience Finder* programme. This analysis builds on these earlier findings to help The Factory and other stakeholder organisations in and around Manchester to understand something of audience dynamics.

Understanding the likely audience impacts resulting from investment in the new facility

Amongst the most fundamental of information needs when considering the likely effects of the investment in a major new arts and cultural facility is ascertaining whether there will be sufficient audience/marketplace to make it a sustainable proposition. And what will the effect be on the audiences for other, existing arts venues and organisations in the city? Will the new facility have the effect of growing the marketplace for cultural engagement, or will it take a slice of the existing audience away from already established providers of arts and cultural engagement opportunities?

TAA's Phase 1 report addressed the first of these questions as to whether there would be sufficient audience by comparing the relative level of existing cultural provision in Manchester per head of resident population to the same situation in other relevant and similar major UK cities, concluding on the basis of comparison that there is the potential for a new facility in Manchester to draw upon a suitably large and relatively under-served marketplace in terms of the total cultural offer.

The report also analysed the likely scale of the catchment and the profile of its population in order to understand whether there are sufficient proportions of the types of people who are well-disposed to attending arts events resident in the catchment area population. The audience for events at MIF - the programme style of which is perhaps the closest blueprint for the proposed offering at The Factory - was analysed to give an indication of the likely scale and nature of the catchment area. This depicted a fairly diverse audience profile with a catchment area reach extending to about 90-minutes' drive-time from which 80% of the audience is likely to be drawn. When this was compared to the audience distribution and profile for events across other arts and cultural venues in Manchester with varying

degrees of overlapping programme, it was observed that the nature of the programme offering would have a significant influence on the likely profile of audiences and the extent to which the new facility would be likely to grow the marketplace for arts and cultural engagement.

This work seeks to further develop the understanding of likely impacts by considering whether and how the nature of audience changes according to the different programme offerings at Manchester International Festival, and therefore what the likely implications are for other existing arts and cultural organisations in Manchester. Furthermore, the recent experience of ATG in offering a significantly enhanced programme offering will be considered to try and understand what kinds of impact on audience growth might result from such changes. Finally, the nature and reach of audiences for blockbuster style exhibitions akin to those envisaged for The Factory is analysed at relevant and comparable venues.

1. Recap key issues from phase 1

TAA's first phase analysis identified the overall scale of the catchment area for MIF events and the size and profile of its audience. This analysis identified that MIF attracts both: (a) a greater relative proportion of its overall audience from within the most local 30-minutes's drive-time area and also (b) a greater proportion of its audience from the most remote (90+ minutes' drive-time) areas than other venues in Manchester. The analysis also identified the distinct features of MIF's audience profile in comparison with other Manchester venues' audience profiles and the local catchment as a whole. Most notably, MIF's much higher representation of the highly engaged groups *Metroculturals* and *Experience Seekers* was observed, along with the notably higher appearance in other Manchester venues' audience profiles, as well as in the catchment area population, of the groups more averagely disposed to attending arts and cultural events, *Dormitory Dependables* and *Trips and Treats*. These key differences are summarised here in *Table 1*.

The first phase analysis did not, however, examine how the reach, profile and attending behaviours of audiences (such as how much they spend, how often and who they attend with) might change according to the different types of event within the MIF programme. For example, we could not yet understand how the profile might change between audiences for star-led, classic blockbuster events such as *Macbeth* featuring Kenneth Branagh, and those for more cutting edge contemporary collaborations such as *Massive Attack v Adam Curtis*. This knowledge is key to understanding where and how the most likely areas for collaboration or competition with regard to audiences for MIF/The Factory and its neighbour organisations might arise. Furthermore, the first phase work did not look in detail at understanding the audience make up of some of the individual venues likely to be directly impacted by The Factory in order to be fully able to identify where some of the major collaboration/ competition fault lines might fall. This second phase analysis addresses these questions surrounding differences between audiences for distinct types of artistic product and their attending behaviours, and understanding audience characteristics at key stakeholder organisations, The Lowry and the Ambassadors Theatre Group's Manchester venues.

Furthermore, this second phase of analysis seeks to build an understanding of the likely nature of the audience for major large-scale daytime exhibitions which was not addressed in the first phase.

Finally, for comparative purposes, this analysis presents a brief overview of the nature of audience reach in relevant comparator organisations in London: English National Opera and The Roundhouse.

Table 1: MIF, Audience Finder and Manchester 60-minute drive-time population Audience Spectrum *profiles compared*

Audience Spectrum Profile:						
Group Name	Number MIF bookers	% MIF bookers	Number Manchester *all venues*	% Manchester *all venues*	60-min Catchment households	% 60-min Catchment households
Metroculturals	1,455	8.2%	3,605	2.0%	13,425	0.2%
Commuterland Culturebuffs	2,849	16.1%	45,750	24.8%	536,606	9.3%
Experience Seekers	4,439	25.1%	18,573	10.1%	308,956	5.3%
Dormitory Dependables	2,791	15.8%	39,676	21.5%	899,931	15.5%
Trips & Treats	2,283	12.9%	28,503	15.5%	1,109,423	19.2%
Home and Heritage	680	3.8%	18,415	10.0%	394,206	6.8%
Up Our Street	822	4.6%	11,401	6.2%	531,201	9.2%
Facebook Families	1022	5.8%	10,959	5.9%	1,189,321	20.5%
Kaleidoscope Creativity	900	5.1%	4,210	2.3%	476,088	8.2%
Heydays	169	1.0%	3,273	1.8%	329,134	5.7%
Unclassified	*299*		*2,633*		5,788,291	

2. MIF: different audiences for different programmes

In order to understand how the proposed programming style of events for The Factory might impact on the profile of audiences, Manchester International Festival's 2013 programme is divided into a number of broad strands which reflect some key characteristics of the nature of those events and also reflect some of the style preferences towards which particular audience segments can be observed to lean towards, and between which it is possible to compare and contrast particular features of audience profile, scale, range and behavioural characteristics. These programme strands, which are less about genre and more about the overall style or the overall nature of the event (and which are mostly transferrable to aid comparison with the programmes of other key stakeholder organisations) are detailed in the following table:

Table 2: Categorisation of MIF 2013 Programme Strands

MIF Categorisation			
Category	**Subcategory**	**Description**	**Number of Bookers**
Classic		Blockbuster works/ artist, known canon, e.g. international opera, ballet, Kenneth Branagh in "Macbeth"	5,559
Contemporary			
	Prodigal NW	High-profile artists, works, partnerships with a North West connection, e.g. Delphic, M O N E Y, The Masque of Anarchy	3,656
	Only at MIF/ The Factory	Surprising new collaborations/experimentation celebrated contemporary stars, e.g. Massive Attack v Adam Curtis, Goldfrapp, Michael Angelo Sonnets	11,871
Made In Manchester		Community-created/ engagement, e.g. Sacred Sounds Choir	384
Creative Learning		Educative, participatory and workshops, e.g. Introduction to Bee Keeping, The Biospheric Project – Family Food Weekend	637

Club Nights		Celebrity DJs, club/danceng, Thee.g. Yellow, Despacio	1,513
Other		Catch all	756

MIF Audience Size and Profile

In total there were 19,810 bookers to the Manchester International Festival 2013 events. Of these, 17,709 bookers were UK residents with valid recorded postcodes that could be used to facilitate analysis of profile and location. *Table 2* details the breakdown of bookers per programme strand, revealing that - in terms of the numbers of bookers - by some margin the largest strand is: *Contemporary: Only at MIF/The Factory*, followed by *Classic*, *Contemporary: Prodigal NW* and *Club Nights*. Perhaps by their participatory and community nature the *Creative Learning* and *Made in Manchester* strands have the fewest bookers. The "catch all"acategory, (where it was least possible to categorise or define an event according to the other categories) *Other* also has a relatively small number of bookers.

Using the *Audience Spectrum* segmentation and profiling tool it is possible to gain a revealing overview of various "types" of people that make up the audience profile. (These "types" are defined primarily according to how they like to engage with arts and cultural activities, and then described in some detail as to their wider behaviours, characteristics and preferences.) The *Audience Spectrum* profile of the overall audience to MIF events in 2013 identifies the groups *Experience Seekers*, *Commuterland Culturebuffs* and *Dormitory Dependables* as MIF's largest audience segments. *Table 3* details the full *Audience Spectrum* profile of bookers to MIF 2013 events:

Table 3: MIF 2013: All bookers Audience Spectrum Profile

MIF 2013 Audience Spectrum Profile					
Group Name	Number MIF bookers	% MIF bookers	Catchment households	% catchment households	Index
Metroculturals	1,455	8.2%	13,425	0.2%	4100
Commuterland Culturebuffs	2,849	16.1%	536,606	9.3%	173
Experience Seekers	4,439	25.1%	308,956	5.3%	474
Dormitory Dependables	2,791	15.8%	899,931	15.5%	102
Trips & Treats	2,283	12.9%	1,109,423	19.2%	67
Home and Heritage	680	3.8%	394,206	6.8%	56
Up Our Street	822	4.6%	531,201	9.2%	50
Facebook Families	1022	5.8%	1,189,321	20.5%	28
Kaleidoscope Creativity	900	5.1%	476,088	8.2%	62
Heydays	169	1.0%	329,134	5.7%	18
Unclassified	*299*		5,788,291		

The *Audience Spectrum* profile shows that not only are *Experience Seekers*, *Commuterland Culturebuffs* and *Dormitory Dependables* the largest MIF audience segments, (making-up well over half of all MIF bookers) but the indices also show that *Experience Seekers* and *Commuterland Culturebuffs* are significantly over-represented in the MIF bookers' profile in comparison with their prevalence in the catchment area[14], meaning that those particular groups display a marked propensity towards MIF events over and above that of any of the other *Audience Spectrum* groups. The exception being the group *Metroculturals*, which is also massively over-represented as evidenced by its index score. This largely results from there being comparatively few of this group resident in the

[14] The catchment area is here defined as a 60-minute drive-time contour around Manchester City Centre. This area contains 77% of all MIF 2013 bookers, and 87% of all Lowry bookers 2012/13.

catchment area and also as a result of a significant number of *Metroculturals* having travelled from places as far as London, Brighton and Edinburgh to attend. This is consistent with their known characteristics. The group *Dormitory Dependables,* whilst being the third largest in the MIF audience profile, are represented roughly in line with their prevalence in the catchment area.

This is the situation for MIF audience as a whole, but does this change according to the different types of programme strand as they have been defined for this analysis? The answer is: yes.

Table 4 shows the profile of bookers to each of the MIF programme strands expressed as percentages and as indices, relative to the profile of bookers to *All MIF 2013* events. Where the percentage representation for any *Audience Spectrum* group in the profile of a given strand, (such as *Classic* events, or *Club Nights*) is the same as the percentage representation of that group in the overall *All MIF 2013* event bookers' profile, the index would read 100. Where the percentage representation of a group is higher in the programme strand profile than it is in the *All MIF 2013* events profile, the index figure would read more than 100. Where the percentage representation of a group is lower in the programme strand profile than it is in the *All MIF 2013* events profile, the index would read less than 100.

The table highlights significant differences of 20 index points or more above or below 100. For example, *Commuterland Culturebuffs* are particularly disposed to attending *Classic* events, of which they make up 19.6% of all bookers, whereas they make-up only 16.1% of bookers to *All MIF 2013* events and therefore this higher propensity for *Commuterland Culturebuffs* to attend *Classic* events is indicated by an index score of 122 which is highlighted in green. Conversely, *Commuterland Culturebuffs* are much less likely to attend *Club Nights* events (making up just 10.6% of bookers) than they are to attend MIF events generally, of which we have observed that they comprise over 16% of bookers. This is represented with an index score of 66, and is highlighted in red.

In this way, it is possible to observe for each programme strand the varying influence of each *Audience Spectrum* segment relative to the overall profile. The key features of the audience profiling specific to each programme strand are:

- **Classic** - *Experience Seekers* are still the largest group, but this is one of the strands in which they are least well represented. *Commuterland Culturebuffs* make up almost a fifth of all bookers and are almost as well represented at *Experience*

Seekers. *Dormitory Dependables* and *Trips and Treats* are the next most well represented groups. *Classic* is a relatively good strand for engaging *Home and Heritage* and *Up Our Street* in comparison with events overall but this is relative as they each make up just over 5% of the *Classic* events profile.

- **Club Nights** - is the biggest draw for *Experience Seekers*. They account for well over a third of all bookers. The next biggest group is *Dormitory Dependables*, but the 14.5% of all *Club Night* bookers that they comprise is an under-representation in comparison to their profile in *All MIF 2013* events overall. The same is true of the next biggest group, *Trips and Treats* at 11.6%. *Commuterland Culturebuffs* are less well represented in *Club Nights* than any other strand, but for *Up Our Street* these events are a relatively appealing choice.
- **Contemporary – Only at MIF** – is such a big strand in terms of overall numbers of its bookers that its profile accordingly looks most similar to the *All MIF 2013* events profile, which it is the largest constituent strand of. Largely the same distribution and order of *Audience Spectrum* groups prevails in both. *Metroculturals*, as well as *Home and Heritage* and *Up Our Street* are proportionately over-represented in the *Contemporary – Only at MIF* strand.
- **Contemporary – Prodigal NW –** the audience profile is again relatively similar to the overall *MIF 2013* bookers profile, with most groups represented in similar proportions between the two profiles. *Heydays* are the group with the highest indexed over-representation, but this reflects a proportion of just 1.4% of *Contemporary – Prodigal NW* bookers compared with their share of just 1% of MIF audiences overall. *Up Our Street* is comparatively well represented, as are *Commuterland Culturebuffs*. This is the programme strand to which *Metroculturals* are least well disposed.
- **Creative Learning** - is a strong programme choice for *Home and Heritage*, and to a lesser degree *Up Our Street*, *Trips and Treats* and *Experience Seekers*. This is the strand to which *Facebook Families* is least well disposed.
- **Made in Manchester** – for *Experience Seekers* this is the least attractive strand – but they are still the most well represented group – just. *Made in Manchester* is the strongest strand for *Commuterland Culturebuffs*, as well as a strong programme choice for *Kaleidoscope Creativity, Up Our Street* and, to a much lesser degree, *Heydays*

Table 4: Audience Spectrum *profiles by programme strand indexed to MIF 2013 profile*

	Classic		Club Nights		Only at MIF		Prodigal NW		Creative Learning		Made in Manchester		Other	
Group Name	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Metroculturals	7.7	94	7.1	86	9.5	116	7.0	85	8.3	101	7.9	96	7.3	89
Commuterland	19.6	**122**	10.6	**66**	15.3	95	17.8	111	15.1	94	19.9	**124**	17.5	109
Experience Seekers	23.0	92	35.6	**142**	27.0	108	25.7	103	27.3	109	22.8	91	23.2	93
Dormitory Dependables	15.9	101	14.5	92	14.1	89	15.5	98	14.2	90	14.6	93	14.5	92
Trips & Treats	12.4	96	11.6	90	12.2	94	13.4	104	14.2	110	11.1	86	11.1	86
Home & Heritage	5.3	**137**	4.0	104	4.6	119	4.0	104	5.0	**131**	4.4	114	3.4	90
Up Our Street	5.5	119	5.9	**126**	5.4	116	5.7	**123**	5.2	112	5.8	**126**	5.1	110
Facebook Families	5.1	89	5.8	100	5.4	93	5.2	90	4.5	**78**	5.6	96	5.4	93
Kaleidoscope Creativity	4.4	86	4.6	90	5.7	113	4.5	88	5.4	106	6.1	**121**	10.9	**215**
Heydays	1.1	116	0.5	**53**	0.9	90	1.4	**143**	0.9	91	1.8	**184**	1.5	**157**
Unclassified	-		-		-		-		-		-		-	
Base	**4,972**		**1,382**		**11,025**		**3,453**		**578**		**342**		**668**	

MIF Audience Reach by Programme Strand

Drive-time analysis is used to help establish how far audiences travel to attend events. Customers' postcodes recorded from booking records are used to establish how long it would take them to drive from home to the event location during off-peak traffic times. Drive-time analysis of bookers to all MIF events in TAA's first phase analysis report indicated that 60% of MIF 2013 audiences were drawn from within 30-minutes' drive-time of central Manchester. This suggests that MIF draws a higher proportion of its audience from within this most 30-minutes' drive distance than other arts organisations in Manchester generally, where 53% of the combined audiences for *Audience Finder* participant audiences are drawn from the same local area. However, whilst MIF exhibits this very local appeal it also draws a greater proportion of its overall audience from much farther afield. Almost a fifth (19%) of MIF 2013 audiences are resident more than 90-minutes' drive-time away from central Manchester, whereas, only 14% of the combined Manchester *Audience Finder* cluster dataset are resident further than 60-minutes' drive-time from central Manchester. This demonstrates that for MIF events there is not only a core local audience, but also an ability to draw audiences from much greater distances. But, how does this geographical reach change according to the programme strands that have been defined?

Chart 1: Drive-time analysis by programme strand for MIF 2013

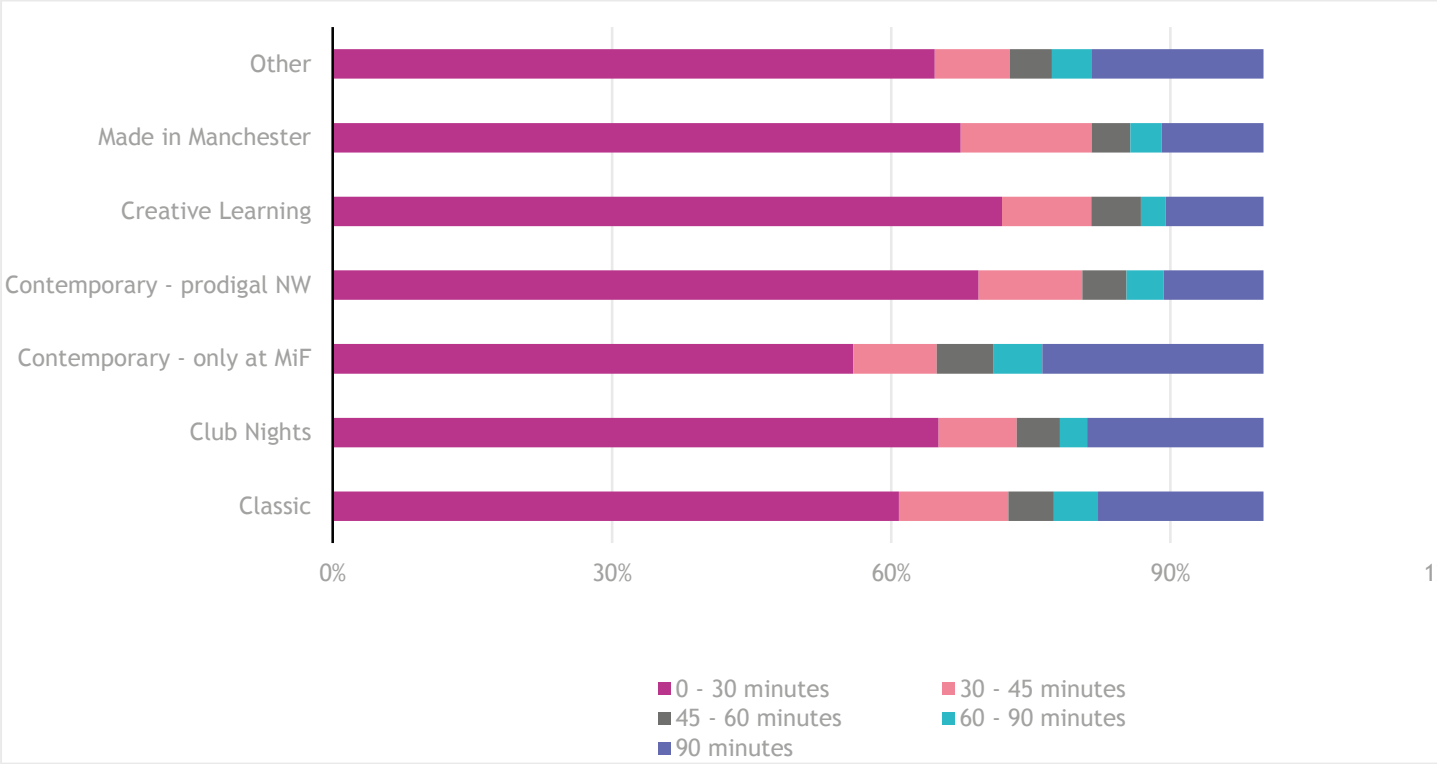
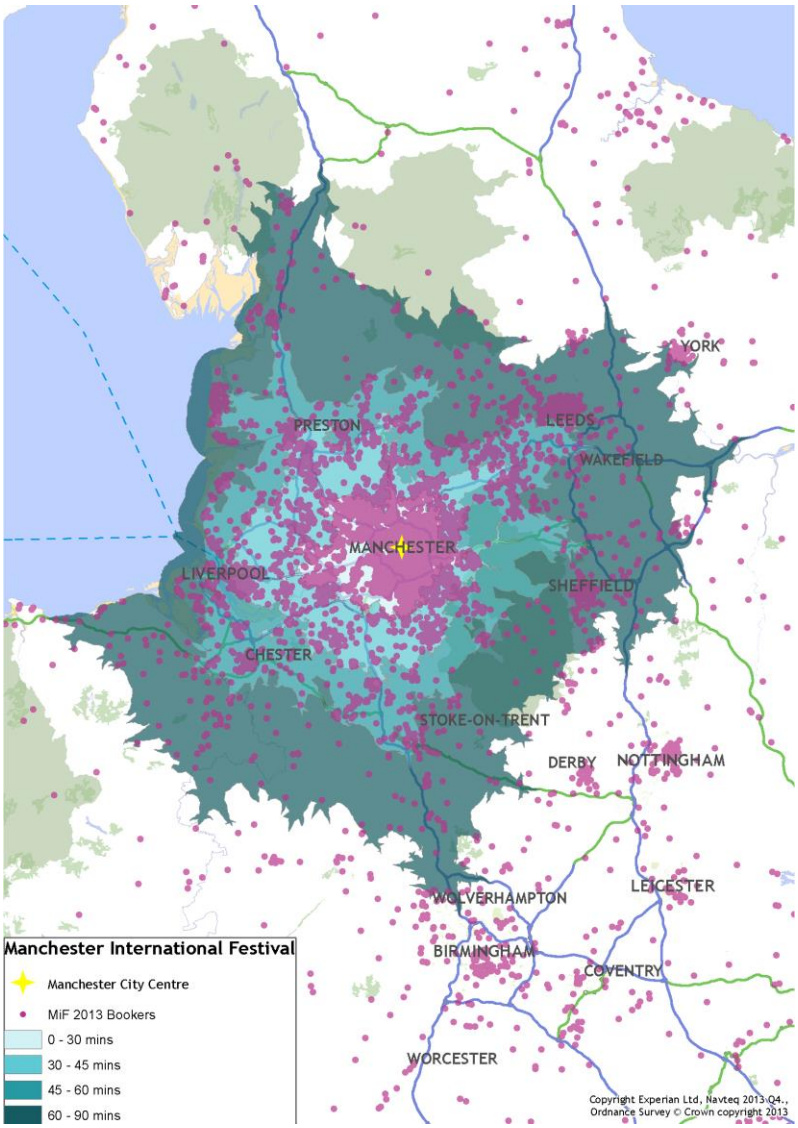


Chart 1 presents a drive-time analysis for each of the programme strands, which breaks the audience down into the following drive-time bands: 30-minutes or less from central Manchester; between 30- and 45-minutes; between 45- and 60-minutes; between 60- and 90-minutes; and further away than 90-minutes' drive-time.

Map 1: MIF 2013 bookers and 30, 30-45, 45-60, 60-90,90+ drive-time bands



The analysis shows that there are some significant differences between how far audiences are drawn to each of the different programme strands. For example, *Contemporary – only at MIF* events draw just 56% of the audience from within 30-minutes' drive-time, whereas *Creative Learning* events draw 72% of the audience from within the same local area.

The events with the ability to draw the greatest proportions of their audience from farther afield are, *Contemporary – Only at MIF*, where almost a quarter of the audience (24%) travel from further than 90-minutes' drive-time. Next comes *Club Nights* and *Other* events (19% from further than 90-minutes), followed by *Classic* events (18% from 90+ minutes' drive-time). *Made in Manchester* events, together with *Creative Learning* and *Contemporary – Prodigal NW* each draw just 11% of their audience from 90-minutes or more drive-time away.

The events drawing the greatest proportions of the audience from the most local area are: *Creative Learning* (72% of bookers drawn from within 30-minutes' drive-time); followed by *Contemporary - Prodigal NW* (69% living 30-minutes or less distance), and then *Made in Manchester* events where 67% of the audience come from that same local area.

The 30-minute to 45-minute drive-time band might be important to consider as this contains much of the hinterland between Manchester and Liverpool from which audiences might be drawn to cultural offerings in either direction. The programme strands that draw most (proportionately) from this area are: *Made in Manchester* (14% of the audience drawn from between 30- to 45-minutes); *Classic* events (12% from the same area); and, *Contemporary - Prodigal NW* (11%).

MIF 2013 Audience Behaviours

By analysing ticketing transaction data it is possible to understand something of how audience ticket purchasing and attending behaviours are affected by the different programme strands; for example, how much do they spend on tickets, and how many people do they attend with?

Table 5: MIF 2013 Ticket Yield, Group Size and Average Customer Value

Programme Strand	Ticket Yield	Group Size	Ave Cust Value
Classic	£27.69	2.5	£79.53
Club Nights	£11.09	2.7	£32.01
Contemp - only at MIF	£26.15	2.4	£74.64
Contemp – prodigal	£8.72	2.8	£27.29
Creative Learning	£0.69	2.9	£2.90
Made in Manchester	£15.70	3.0	£6.95
Other	£14.10	3.1	£46.66

Ticket Yield

At MIF 2013 *Table 5* shows that, in terms of ticket yield, the programme strands tend to divide into three quite distinct bands: around a distinctly higher value ticket yield; a clear middle level; and then a much lower level of ticket yield. *Classic* events, which command the highest average ticket yield (£27.69), and *Contemporary – Only at MIF* events (not much further behind, with an average ticket yield of £26.15) make up the highest yield band. There is then quite a significant drop to a middling level of yield for *Made in Manchester* (£15.70), *Other* events (£14.10) and *Club Nights* (£11.09). The events with the lower ticket yield are: *Contemporary – Prodigal NW* (£8.72) and *Creative Learning* (£0.69 – there is no charge for many of the tickets in this strand).

As these bands are quite distinct, the average customer value (mean average spend per customer on tickets for the respective strand) for each stand follows the same pattern, with bookers for *Classic* events spending on average £79.53 at the highest extreme, and at the other extreme bookers for *Creative Learning* events spending just £2.90 on average.

Group Size

Looking at the group sizes for people attending events at MIF 2013 as a whole, the most commonly booked number of tickets per transaction is two. Nearly two thirds (63.7%) of all transactions are for two tickets per event. The next most common size of group attending is one. There were well over 5,000 tickets issued in transactions completed for just a single ticket, which represents almost a fifth (18.6%) of all bookings. This large proportion of lone attenders is illustrative of the highly engaged, knowledgeable arts-attending people that form a significant part of the overall MIF audience. They are often attending less for social reasons, than for their committed interest in the art itself and are more confident and likely to do so alone.

There were just over 3,850 bookings made for three or four tickets per event, which represents 13.6% of all bookings. This leaves just 4.1% of bookings transactions being made in which five or more tickets are issued. In terms of how group size varies across the programme strand, it is perhaps most straightforward to examine the average group size, i.e. the mean average number of tickets per event booked per transaction. Because of the dominance of two- and one- ticket purchases across the whole of MIF 2013, the range in average group size is not very broad, going from 2.4 people per group at the lower extreme (*Contemporary – Only at MIF* events), up to 3.1 people per group at the higher extreme (*Other* events), closely followed by 3.0 people per group (*Made in Manchester* events). It is noteworthy that the higher value (in

terms of yield per ticket) strands (*Classic* and *Contemporary – Only at MIF*) sit at the lower extreme of the group size range.

Frequency and Programme Crossover

Of the 19,810 bookers to MIF 2013, more than a fifth (a total of 4,063, or 21%) booked to see more than one event at MIF 2013. Note that this is a relatively high proportion of frequent attenders. Of those, 2,435 (or 12% of all MIF 2013 bookers) booked to see two events; 770 (4%) booked to see three events; and 341 (2%) booked to see four events. This leaves 517 people (3%) who booked for five events or more at MIF 2013. It is noteworthy that the 9% of bookers who booked for three events or more are responsible for a disproportionately high percentage of the tickets sold (they bought 37% of all the tickets) and the income generated through ticket sales (they spent 28% of all the money generated through ticket sales).

Table 6: MIF 2013 Programme Strand Crossover

Programme Strand/Programme Strand	Classic	Club Nights	Contemporary - only at MIF	Contemporary - prodigal NW	Creative Learning	Made in Manchester	Other
Classic		4%	28%	18%	3%	2%	3%
Club Nights	15%		29%	14%	4%	2%	4%
Contemporary - only at MIF / The Factory	13%	4%		11%	2%	2%	2%
Contemporary - prodigal NW	27%	6%	34%		4%	3%	4%
Creative Learning	24%	9%	35%	24%		5%	12%
Made in Manchester	35%	6%	48%	26%	8%		10%
Other	23%	8%	35%	20%	10%	5%	

In terms of understanding what those audiences who attended more than one event went to see, *Table 6* illustrates the level of audience crossover between the different programme strands. So, for example, the greatest level of audience crossover between two programme strands is observed between *Made in Manchester* and *Contemporary - Only at MIF*, where nearly half (48%) of the audience who attended *Made in Manchester* events had also gone to see *Contemporary - Only at MIF* events. [The table presents the percentage of the audience for the programme strands listed in the left hand column that also attended the programme strand listed in the top row.] It should be noted that the very significant levels of crossover obtain between all programme strands and *Contemporary - Only at MIF*. This almost certainly has to do with size and scale of *Contemporary - Only at MIF* events and their large popularity. The same is true to a lesser extent of *Classic* and *Contemporary - Prodigal NW* events which also

exhibit high levels of crossover with multiple other programme strands but in lesser proportions and in more varying degrees. For example, more than a third (35%) of *Made in Manchester* attenders and over a quarter (27%) of *Contemporary – Prodigal NW* bookers also attended *Classic* events, but only 15% of *Club Night* attenders, and only 13% of *Contemporary – Only at MIF* bookers also attended *Classic* events.

Other notable levels of crossover are observed between: *Creative Learning* and *Other* events; *Made in Manchester* and *Other* events; *Creative Learning* events and *Club Nights*; and, *Other* events and *Club Nights*.

3. Detailed analysis of major existing provision: The Lowry

The Lowry theatre and gallery complex in Salford Quays is a significant part of the established arts and cultural offer in Manchester. To be able to address how programming and audiences at The Lowry might be affected by the proposed new provision at The Factory and to then plan accordingly and effectively, it is first necessary to understand where there are similarities and differences between the existing audiences at The Lowry and the likely audience profile for the proposed offering at The Factory.

This analysis has taken the existing audience for MIF 2013 events as the closest available blueprint for audiences at The Factory. In order to make this comparison as straightforward as possible, The Lowry's programme for the year April 2012 to March 2013[15] has been categorised into programme strands as closely resembling those used for the analysis of MIF 2013 data as possible and appropriate to define them.

The Lowry's programme strands and their definition for *Classic*, *Made in Manchester*, *Creative Learning* and *Other* correspond very closely to those same categories used for MIF. The *Contemporary* strand for The Lowry's categorisation is distinct from that of MIF in that it distinguishes between premiers and brand new contemporary work and other contemporary theatre, dance and music which is not quite as brand new; rather than by either the regional aspect to an event's nature, or the unique style of collaboration or experimentation which is a hallmark of MIF's offering. It is still instructive to compare and contrast between the various *Contemporary* programme strands at The Lowry and MIF 2013. The categorisation used for The Lowry's 2012/13 programme is detailed in *Table 7*.

[15] This is the closest period, from the same calendar year as the 2013 MIF events that have been analysed elsewhere in this work, that there is at the time of undertaking this work fully available, genre coded event booking transaction data available for.

Table 7: Categorisation of The Lowry 2012-13 Programme Strands

Lowry Categorisation			
Category		Description	
Classic		Large/mid-scale work/artist, known canon, e.g. Julius Ceasar, Die Walkure, BRB's Swan Lake	12,350
Contemporary	**Main**	Theatre, dance, music, e.g. Rambert Dance Company, One Man Two Guvnors, Ukulele Orchestra of Great Britain	53,411
	New	Premiers, new writing, , e.g. Dancing with the Orange Dog, Onions Cry Too, Our Lady of the Goldfinches	3,099
Made In Manchester		Community-created/engagement, e.g. Salford Music Festival All Dayer, Docks Law	724
Creative Learning		Educative, participatory and workshops, e.g. Can Draw Will Draw, Drama Zone: Gruffalo & Tiger	3,466
Other		Catch all	48,824

The Lowry: Audience Size and Profile

In 2012/13 The Lowry attracted a total of 103,787 bookers to the main programme of events. Of these, 100,621 are UK residents with valid recorded postcodes that could be used to facilitate analysis of profile and location. *Table 7* details the breakdown of bookers per programme strand, indicating that *Contemporary – Main* attracts the largest numbers of bookers (well over 50,000). That one of the contemporary strands has the greatest audience mirrors the case in MIF 2013 events. However the biggest strand by a big margin is *Contemporary – Only at MIF,* which would equate more to The Lowry's *Contemporary – New* category which has a much smaller audience. This is clearly an area of potential overlap.

The programme strand *Other* is the next largest, indicating the breadth of the offering at The Lowry, and a range of events, (such as "Christmas Shows", "Children & Family Drama" and "Comedy and Comedians") that have no real equivalent in the MIF programme. However, The Factory proposes a large-scale Christmas production which would add significantly to the number of seats to be filled at a time of year when there is already intensive competition for the seasonal audience and a high volume of provision across the North West. The Wales Millennium Centre made significant losses in finding a Christmas offer which was viable in competition with the existing venues' seasonal offerings.

Classic events are the third largest strand, with over 12,000 bookers during 2012/13. The *Contemporary – New* and *Creative Learning* strands have similar sized audiences with over 3,000 bookers each. Finally, *Made in Manchester* is the strand with the smallest audience, of around 700 bookers.

The Audience Spectrum profile of bookers to all The Lowry's 2012/13 events depicts the groups, *Commuterland Culturebuffs, Dormitory Dependables* and *Trips and Treats* as The Lowry's largest audience segments. In stark contrast to the profile of MIF 2013 audiences, the group, *Experience Seekers* ranks fifth largest in The Lowry's audience profile, whereas *Experience Seekers* are the largest group in the MIF profile by a considerable margin. Likewise, the group *Metroculturals,* whilst over-represented in The Lowry's audience profile, comprise just 1.5% of all bookers, whereas they make up 8.2% of the MIF 2013 booker profile. This suggests that, whilst there are commonalities between The Lowry and MIF's audience profiles, they are attracting some demonstrably distinct audience groups to particular elements, of their programmes. *Table 8* details the full Audience Spectrum profile of bookers to The Lowry events.

Table 8: The Lowry 2012/13 All bookers Audience Spectrum Profile

The Lowry, 2012/13 Audience Spectrum Profile					
Group Name	Number The Lowry bookers	% The Lowry bookers	Number of 60-minute drive-time catchment households	% of 60-minute drive-time catchment households	Index
Metroculturals	1,535	1.5%	13,425	0.2%	750
Commuterland Culturebuffs	23,182	23.2%	536,606	9.3%	250
Experience Seekers	8,920	8.9%	308,956	5.3%	168
Dormitory Dependables	22,486	22.5%	899,931	15.5%	145
Trips & Treats	16,981	17.0%	1,109,423	19.2%	89
Home and Heritage	9,463	9.5%	394,206	6.8%	140
Up Our Street	6,383	6.4%	531,201	9.2%	70
Facebook Families	7,019	7.0%	1,189,321	20.5%	34
Kaleidoscope Creativity	2,055	2.1%	476,088	8.2%	26
Heydays	1,815	1.8%	329,134	5.7%	32
Unclassified	*782*		5,788,291		

Table 8 depicts the profile for The Lowry's full audience, but again it is instructive to see how this does change according to the different types of programme strand as they have been defined for this analysis.

Table 9 shows the profile of bookers to each of The Lowry's programme strands expressed as percentages and as indices relative to the profile of bookers to all The Lowry's 2012/13 events. Where the percentage representation for any *Audience Spectrum* group in the profile of a given strand is the same as the percentage representation of that group in the overall Lowry 2012/13

all event bookers' profile, the index would read 100. Where the percentage representation of a group is higher in the programme strand profile than it is in The Lowry's 2012/13 all event bookers' profile, the index figure would read more than 100. Where the percentage representation of a group is lower in the programme strand profile than it is in The Lowry's 2012/13 all event bookers' profile, the index would read less than 100.

The table highlights significant differences of 20 index points or more above or below 100. For example, people from the Audience Spectrum group *Facebook Families* are particularly disposed to attending *Made in Manchester* events, of which they make up 23% of all bookers, whereas they make-up only 7% of bookers to all The Lowry's 2012/13 events. Therefore this higher propensity for *Facebook Families* to attend *Made in Manchester* events is indicated by an index score of 334 and is highlighted in green. Conversely, *Facebook Families* are much less well disposed to attend *Classic* events (making up just 5% of *Classic* event bookers) than they are to attend events at The Lowry generally, to which we have observed that they comprise over 7% of all bookers. This is represented with an index score of 69, and is highlighted in red.

Using the *Audience Spectrum* profiles as a means to distinguish between the types of audiences attending different kinds of work across The Lowry's offering, the key features specific to each programme strand are:

- **Classic** – *Commuterland Culturebuffs* are the biggest single group, making up 29% of all *Classic* event bookers at The Lowry. This is a 50% bigger share of the audience for *Classic* events at The Lowry than *Commuterland Culturebuffs* comprise in the respective audience profile for MIF 2013. Together with *Dormitory Dependables,* these two groups make up half of the total *Classic* audience at The Lowry. Whilst *Dormitory Dependables* are the second largest group, they are comparatively under-represented in in *Classic* event audiences, compared with their propensity to attend The Lowry overall.

  In contrast to MIF 2013's *Classic* events audience profile where they are the largest single group, *Experience Seekers* make up just 11% of bookers to The Lowry's *Classic* events. It is also notable that *Metroculturals* are much less well-represented in The Lowry's *Classic* events audience profile (accounting for just 2% of the audience) than they are in MIF's where they comprise 8% of the audience for *Classic* events. *Trips and Treats*, *Facebook Families* and *Heydays* are under-represented in *Classic* event audiences compared with their overall propensity to attend events at Lowry as a whole.

- **Contemporary – Main** – in common with MIF's *Contemporary – Only at MIF* events audience profile, the audience for The Lowry's *Contemporary – Main* programme strand is such a large proportion of the overall numbers of bookers that its profile accordingly

looks most similar to The Lowry's 2012/13 all events audience profile, with *Commuterland Culturebuffs*, *Dormitory Dependables* and *Trips and Treats* forming almost two thirds of the audience, and in notably bigger proportions than they appear in the equivalent MIF programme strand profile. *Metroculturals* and *Experience Seekers* are notably much less well-represented in The Lowry's *Contemporary Main* events audience than they are in the equivalent MIF profile.

- **Contemporary – New –** of all the events at The Lowry, *Experience Seekers* are most inclined to attend *Contemporary – New* events, of which they are 16% of the audience. This is also the programme strand that *Metroculturals* are most likely to attend at The Lowry – although they still only make up 3% of the audience in this strand which is one of the smaller strands in terms of audience numbers. Correspondingly, *Commuterland Culturebuffs* and *Dormitory Dependables* are notably less likely to attend *Contemporary – New* events than almost all other programme strands. *Contemporary – New* is also a relatively good strand for attracting both *Facebook Families* and *Kaleidoscope Creativity* – neither of which are particularly inclined to attend the most *Contemporary* offerings at MIF but in combination make-up 13% of The Lowry's *Contemporary – New* audience.
- **Creative Learning** – is one of the most effective strands in The Lowry's programme at engaging some the groups that are generally amongst the least well-disposed to arts and cultural attendance, with significant over-representations of *Facebook Families*, *Heydays* and *Kaleidoscope Creativity*. In contrast, the group typically most well represented in most of The Lowry's other programme strands, *Commuterland Culturebuffs* is less well represented in the *Creative Learning* audience to the extent that *Dormitory Dependables* becomes the largest single group in this audience profile, and *Trips and Treats* too are over-represented, making up almost a fifth of the audience. *Experience Seekers* and *Metroculturals* are not as likely to attend *Creative Learning* events as they are most other events, with the exception of *Made in Manchester*.
- **Made in Manchester** – as would be expected from the nature of the events, *Made in Manchester* is particularly effective at engaging some of the harder to reach groups through community-based productions and activities. The groups *Facebook Families* and *Up Our Street* contribute a third of the attenders, with further strong representations of *Heydays*. The moderately well artistically and culturally active groups, *Dormitory Dependables*, *Trips and Treats* and *Home and Heritage* comprise the majority 46% of the

audience. The high engagers, *Metroculturals*, *Commuterland Culturebuffs* and *Experience Seekers* are clearly least disposed to attend *Made in Manchester* events out of all The Lowry's offerings. This effect of the reduction in attendances of the typically most highly engaged groups, replaced by groups normally least likely to attend cultural events except through community focused or based activities, is not seen to the same degree of effect in the equivalent programme strands of MIF 2013.

Table 9: Audience Spectrum *profiles by programme strand indexed to The Lowry 2012/13 full audience profile*

Group Name	*Classic* at The Lowry 2012/13		*Contemporary - Main* at The Lowry 2012/13		*Contemporary - New* at The Lowry 2012/13		*Creative Learning* at The Lowry 2012/13		*Made in Manchester* at The Lowry 2012/13		*Other* at The Lowry 2012/13	
	%	Index	%	Index	%	Index	%	Index	%	Index	%	Index
Metroculturals	2%	147	2%	104	3%	217	1%	78	1%	58	1.2%	80
Commuterland Culturebuffs	29%	127	25%	109	18%	79	20%	84	9%	37	20.1%	87
Experience Seekers	11%	126	8%	94	16%	185	8%	86	4%	42	8.6%	97
Dormitory Dependables	21%	92	23%	101	17%	76	22%	100	20%	89	22.8%	101
Trips & Treats	13%	74	16%	94	15%	88	18%	108	18%	106	19.0%	111
Home & Heritage	10%	103	10%	108	8%	82	7%	77	8%	88	9.0%	95
Up Our Street	6%	89	6%	98	7%	117	6%	100	10%	149	6.9%	108
Facebook Families	5%	69	6%	84	9%	124	11%	160	23%	334	8.1%	115
Kaleidoscope Creativity	2%	108	2%	92	4%	175	3%	138	2%	87	2.1%	104
Heydays	1%	69	2%	91	2%	116	3%	162	6%	311	2.1%	115
Base	11,912		51,194		2,698		3,099		673		47,305	

The Lowry 2012/13 Audience Reach by Programme Strand

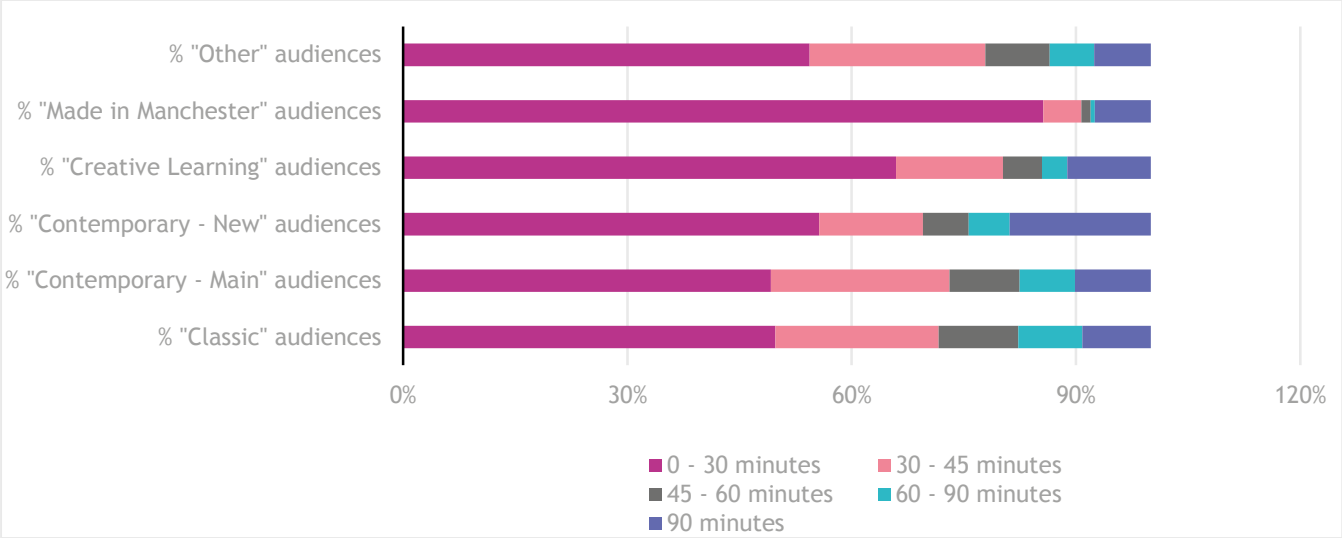
Drive-time analysis of bookers to all The Lowry's events in 2012/13 indicates that 53% of all bookers were drawn from within 30-minutes' drive-time, compared with 60% of MIF audience which is drawn from within 30-minutes' drive-time. This suggests that The Lowry does not draw such a high proportion of its audience from within its most local 30-minutes' drive-time compared with MIF, but it is absolutely in line with other arts organisations in Manchester, where there is also 53% of the combined audiences for *Audience Finder* participant audiences drawn from the same local area drive-time definition.

Beyond the most immediate local 30-minutes' drive-time, The Lowry then attracts a much greater proportion of its audience from the doughnut-shaped area defined between 30- and 60-minutes' drive-time from central Manchester. A further 33% of The Lowry's audience is drawn from this area, meaning that 87% of the audience travels 60-minutes or less to attend The Lowry. By comparison, whilst MIF exhibits a larger proportion of very local appeal, it then attracts a much smaller proportion of its audience from between 30- and 60-minutes' drive-time away which includes much of the area between Manchester and Liverpool, (just 16%). This means that for MIF 76% of its audience travel 60-minutes or less, and a much greater proportion than is the case for The Lowry travel from farther afield: 24% of MIF 2013 bookers travel 60-minutes or more (compared with 13% of The Lowry's audience) and almost a fifth (19%) of MIF 2013 audiences are resident even more than 90-minutes' drive-time away.

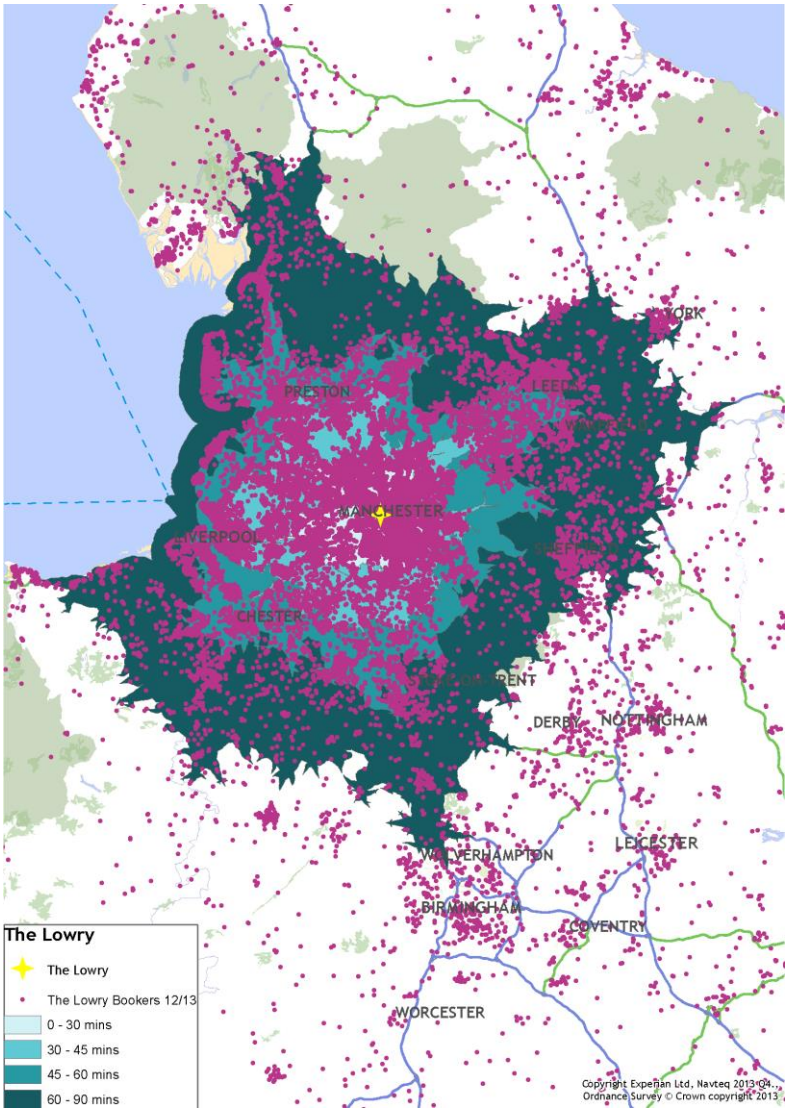
Chart 2 demonstrates how The Lowry's audience reach, expressed in terms of drive-time, differs by programme strand by presenting a drive-time analysis for each of the programme strands, breaking the audience down into drive-time bands of: 30-minutes or less; between 30- and 45-minutes; between 45- and 60-minutes; between 60- and 90-minutes; and further away than 90-minutes' drive-time.

These drive-time bands are depicted in Map 2, which also plots The Lowry 2012/13 audience over the drive-time bands. A cursory comparison with Map 1 (above) reveals The Lowry's deeper penetration of the areas between 30-minutes and 60-minutes' drive-time, in comparison with the MIF 2013 audience distribution.

Chart 2: Drive-time analysis by programme strand for The Lowry 2012/13



Map 2: The Lowry 20112/13 bookers and 30, 30-45, 45-60, 60-90,90+ drive-time bands



Again, the drive-time analysis shows that there are some significant differences between how far audiences are drawn to each of the different programme strands. For example, *Contemporary – Main* events draw just 49% of the audience from within 30-minutes' drive-time and *Classic* events just 50%, whereas *Made in Manchester* events draw a huge 86% of the audience from within the same local area. This draws parallels with the drive-time analysis of MIF audiences: where the *Contemporary* and *Classic* programme strands had the lowest local levels of penetration whilst the *Made in Manchester* and *Creative Learning* strands generated much bigger proportions of their audiences from the most local environs – but not as big, proportionally - as The Lowry.

The programme strand drawing the greatest proportion of audiences from farther afield is *Contemporary - New*, where almost a fifth of the audience (19%) travel from further than 90-minutes' drive-time. Next, drawing 11% of the audience from further away than 90-minutes comes *Creative Learning* (which has strong concentrations of audiences in both the immediate local vicinity and also from much further afield, and with less in between). *Contemporary - Main* follows next, drawing 10% of its audience from 90+ minutes distance, and then *Classic* drawing 9% from the same. Whist *Contemporary - Main* and *Classic* have the smallest local 30-minutes or less proportional reach, this does not equate to having the largest reach at the most remote end of the scale; at The Lowry both of these programme strands draw significantly more of their audience from between 30- and 60-minutes' drive distance than any of *Made in Manchester*, *Creative Learning* or *Contemporary - New* events. They are drawing heavily from the hinterland outside Greater Manchester and between other neighbouring big cities.

To compare with MIF 2013, it is the *Made in Manchester, Classic* and *Contemporary - Prodigal NW* (11%) that draw audiences from this same area, but to a lesser degree proportionally. It is worth noting that it is the *Classic* programme and elements of the *Contemporary* at both MIF and The Lowry that would draw from these areas.

The Lowry Audience Behaviours

An overview of ticket purchasing and attending behaviours across The Lowry's different programme strands, including how much they spend on tickets and how many people attend, is detailed in *Table 10*:

Table 10: The Lowry Ticket Yield, Group Size and Average Customer Value

Programme Strand	Ticket Yield	Group Size	Ave Cust Value
Classic	£24.17	2.6	£78.00
Contemporary – Main	£24.72	2.9	£93.44
Contemporary – New	£8.11	2.4	£23.54
Creative Learning	£5.62	3.9	£30.21
Made in Manchester	£3.49	3.6	£13.56
Other	£20.58	3.3	£80.66

Ticket Yield

For The Lowry, *Table 10* shows that, in terms of ticket yield, the programme strands tend to divide into two distinct bands: around a distinctly higher average ticket yield (roughly between £20 and £25); and one other much lower level of average ticket yield (approximately £3 to £5). This is different to the case at MIF 2013, where there were three distinct bands. The chief difference is that MIF's middle yield band, which contained *Club Nights* (to which there is no equivalent in The Lowry's analysis), *Made in Manchester* and *Other* disappears in The Lowry's analysis. For The Lowry, *Made in Manchester* lies in the lower band with the lowest average ticket yield of £3.49, and *Other* falls into the higher value band. In both organisations, the *Classic* strand falls into the higher band and so too does *Contemporary – Main,* with an almost equivalent ticket yield value to MIF's *Contemporary – Only at MIF* strand. Overall, these higher average yields are a little lower (between £0.61 and £3.50 lower) in The Lowry's case than they are in the MIF equivalents. The exceptions are for *Creative Learning*, where The Lowry's average yield is £4.93 higher (largely the result of the number of complimentary tickets issued for this strand at MIF 2013) and *Other* events, where The Lowry's average ticket yield is £6.48 higher than that at MIF.

Group Size

The most commonly booked number of tickets per transaction at The Lowry across all 2012/13 events is similar to MIF: two. However, the proportion of tickets bought in pairs at The Lowry is slightly lower at 59% of all transactions, compared to nearly two thirds (63.7% of all transactions at MIF). Again, the next most common size of group attending is one. There were nearly 12,000 tickets issued in transactions completed for just a single ticket but this represents a much lower proportion of The Lowry's ticket sales (just, 8%) compared with those made for a single ticket at MIF where they account almost a fifth (19%) of all bookings. The Lowry, then has a much higher proportion of people attending in groups of three or four. These groups account for 25% of all the purchases made at The Lowry, compared to just 14% of all MIF bookings. Again, as it was in the case of lone visitors at MIF, these three and four group attenders are further illustrative of the more averagely-disposed arts attenders that make up a large core of The Lowry's audiences, and whose motivations for attending are more likely to tend towards the social than the artistic. The Lowry also has a higher proportion of people attending in groups of five or more at 8%, compared with 4% at MIF 2013.

Looking at how average group size varies across the programme strands for The Lowry, the range of averages is broader than MIF. The programme strand with the smallest average group

size of 2.3 is *Contemporary – New*. At the higher end of the range the average group size for people attending *Creative Learning* events is 3.9. The narrower range at MIF spanned from 2.4 people per group for *Contemporary – Only at MIF* events, up to 3.1 people per group for *Other* events. Overall, average group sizes tend to be larger at The Lowry than for MIF - nearly all programme strands (with the only exception of the *Contemporary* events) The Lowry has slightly larger average group sizes.

Frequency and Programme Crossover

The Lowry had a slightly larger proportion of its audience that booked for only one event in 2012/13 than is the case for MIF 2013: 82% of 103,787 Lowry 2012/13 bookers made only a single booking in that year. For MIF 2013 the equivalent once-only booker figure is 79%.

Of those Lowry attenders that booked more than once, 11% booked to see two events; 3% booked to see three events; and 1% booked to see four events. 2% booked for five events or more at The Lowry in 2012/13.

With MIF, 9% of bookers who booked for three events or more are responsible for a disproportionately high percentage of tickets sold (37% of all tickets) and income generated through ticket sales (28% of all money generated through ticket sales). The same is true of The Lowry where just 7% of all bookers booked for three or more events, yet are responsible for purchasing 24% of tickets (worth 21% of all revenue generated through ticket sales). That 7% of bookers bought 104,037 tickets (worth over £2m from a total of £9.4m generated through ticket sales) means these frequent bookers are incredibly valuable to the organisations.

Table 11: The Lowry 2012/13 Programme Strand Crossover

Programme Strand/Programme Strand	Classic	Contemporary - Main	Contemporary - New	Creative Learning	Made in Manchester	Other
Classic		28%	3%	2%	0%	14%
Contemporary - Main	6%		2%	1%	0%	13%
Contemporary - New	10%	27%		4%	1%	20%
Creative Learning	9%	16%	4%		3%	14%
Made in Manchester	5%	12%	5%	13%		12%
Other	4%	14%	1%	1%	0%	

Table 11 illustrates for those audiences of The Lowry 2012/13 who booked more than one event, which programme strands they tended to crossover between. For example, the greatest level of audience crossover between two programme strands is observed between *Classic* and *Contemporary - Main*, where well over a quarter (28%) of the audience that booked to attend *Classic* events had also gone to see *Contemporary - Main* events. [The table presents the percentage of the audience for the programme strands listed in the left hand column that also attended the programme strand listed in the top row.]

Overall, because a smaller proportion of The Lowry's bookers that booked for more than one event in comparison with MIF 2013, the overall levels of crossover observed between strands is commensurately lower. It is evident that there are significant levels of crossover between all programme strands and *Contemporary - Main*. This almost certainly has to do with size and scale of *Contemporary - Main* events and their wide popularity. Further investigation would be required to fully understand whether *Contemporary - Main* acts as an entry point to The

Lowry's programme that audiences then develop into other strands from, or whether people first attending other event strands and having positive experiences are then subsequently drawn to The Lowry's significant *Contemporary – Main* offer. Similar notable crossover at a slightly lesser scale obtains between all programme strands and *Other* events.

Other notable levels of crossover are observed between *Contemporary – New* and *Classic* events; *Made in Manchester* and *Other* events; and then between *Made in Manchester* and *Creative Learning* events.

4. Analysis of major existing provision: ATG

Analysis of the nature of the audience at Ambassadors Theatre Group (ATG) venues in Manchester and neighbouring cities between 2011 and 2013 will be instructive in terms of both:

a) Developing an understanding of whether ATG attracts the same type of audience as The Factory is likely/projected to and;

b) What the effect on the marketplace might be when the arts and cultural offering is significantly developed or boosted.

During the 2012 programme year the ATG venues in Manchester (the Opera House and Palace Theatre) and in Liverpool (Liverpool Empire Theatre) changed the nature of the programming of events to incorporate West End style blockbuster productions, such as *The Lion King* and *Wicked*. In this period, significant effects on the scale and, to a lesser degree, the nature of the audience at these ATG venues are observed. In overall terms, the number of attendances at these venues has grown significantly over 2011 to 2013, as the following table shows:

Table 12: Audience size at ATG venues in Manchester and Liverpool, 2011 to 2013

Calendar Year	Attendances at ATG Manchester Venues	Attendances at ATG Liverpool
2013	193,861	83,941
2012	146,202	70,191
2011	146,944	50,520

Over the period 2011 to 2013, the size of the audience at ATG venues in Manchester grew 32%: from almost 147,000 attendances to almost 197,000 attendances. At the same time, the audience for events in Liverpool at the Empire Theatre grew 66%: from 50,000 attendances to almost 84,000 attendances. It is clear that the audience overall has grown significantly, but has that growth in audiences in Liverpool and Manchester respectively been achieved at the cost of reducing audience crossover between the venues in the two cities?

How has crossover between Manchester and Liverpool been affected?

Has the new style of programming and the increased audience numbers caused a reduction in the number of people visiting venues in both cities? The evidence of the audience data would suggest not. At the same time that the respective audiences at ATG venues in both cities grew, the numbers of people attending events in both cities also increased - not just the numbers, but the overall proportions of people visiting venues in the same year in both cities steadily grew. *Table 13* shows that the number of "crossover" customers (i.e. those customers who booked to see performances at ATG venues in both Liverpool and Manchester in the same year) grew year on year through 2011 to 2013, from 3,354 to 6,190. Moreover, as audiences at those venues grew in overall terms during that period, it is then significant that the crossover audience increased both in numerical terms and also as a percentage of the audience in Manchester, rising from 2.3 of the 2011 ATG Manchester audience that also attended events at Liverpool Empire to 3.2 in 2013, and that proportion of crossover bookers also grew as a percentage of the audience in Liverpool, from 6.5 of the Empire audience in 2011 to 7.4 in 2013.

Table 13: Crossover audiences between ATG venues in Manchester and Liverpool, 2011 to 2013

Calendar Year	Crossover customers (i.e. number of bookers that booked events in both ATG Manchester and Liverpool, in year)	Crossover customers as percentage of all ATG Manchester bookers (in year)	Crossover customers as percentage of all ATG Liverpool bookers (in year)
2013	6,190	3.2	7.4
2012	3,673	2.5	5.2
2011	3,354	2.3	6.5

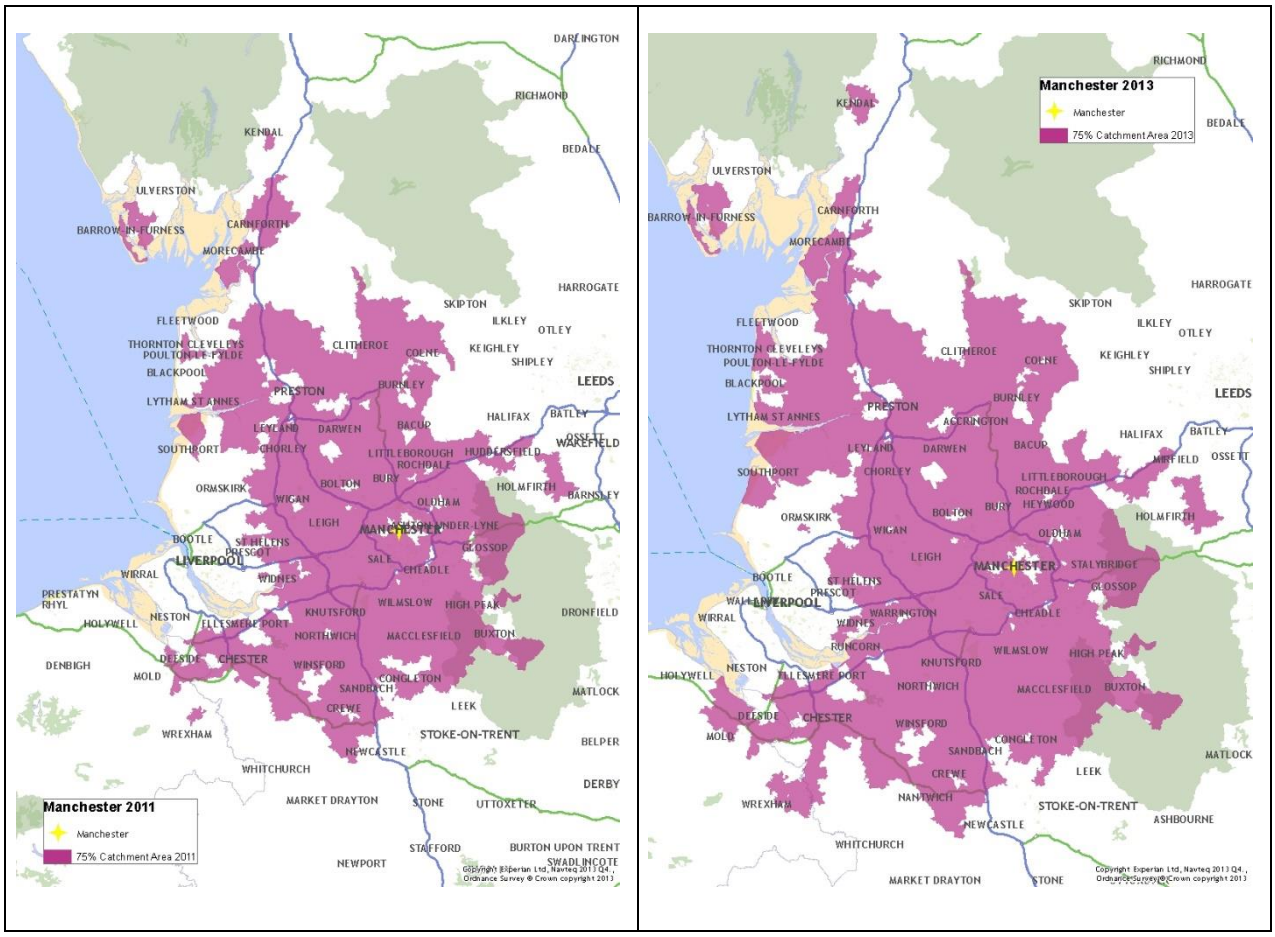
In other words, not only did the change in programming style correspond with an increase in the overall numbers of attendances, but it also corresponded at the same time in an increased proportion of customers attending events in both cities. Far from "cannibalising" the potential

audience crossover, in ATG's particular experience the change in programming style has been accompanied by overall growth in audience for the ATG venues.

How has the catchment area for Manchester and Liverpool changed between 2011 and 2013?

Overall, *Maps 3* and *4* illustrate that the catchment area for ATG venues in Manchester (which is defined by including all those postal sectors containing the greatest numbers of bookers up to a cumulative total of 75% of all bookers) looks to be similar in shape across the period from 2011 to 2013. However, detailed analysis of its composition shows that the catchment area has grown significantly in area during that time, so that in 2013 it takes in more than 60 additional postcode sectors that were not within the catchment area in 2011, especially in outlying areas such as: Mold, Wrexham, Colne, Littleborough, Huddersfield and south of Morecambe. In overall terms, during this period the expansion of the catchment area resulted in an increase in the population of the catchment area for ATG's Manchester venues, growing from around 1.9 million households in 2011 to well over 2.1 million households in 2013.

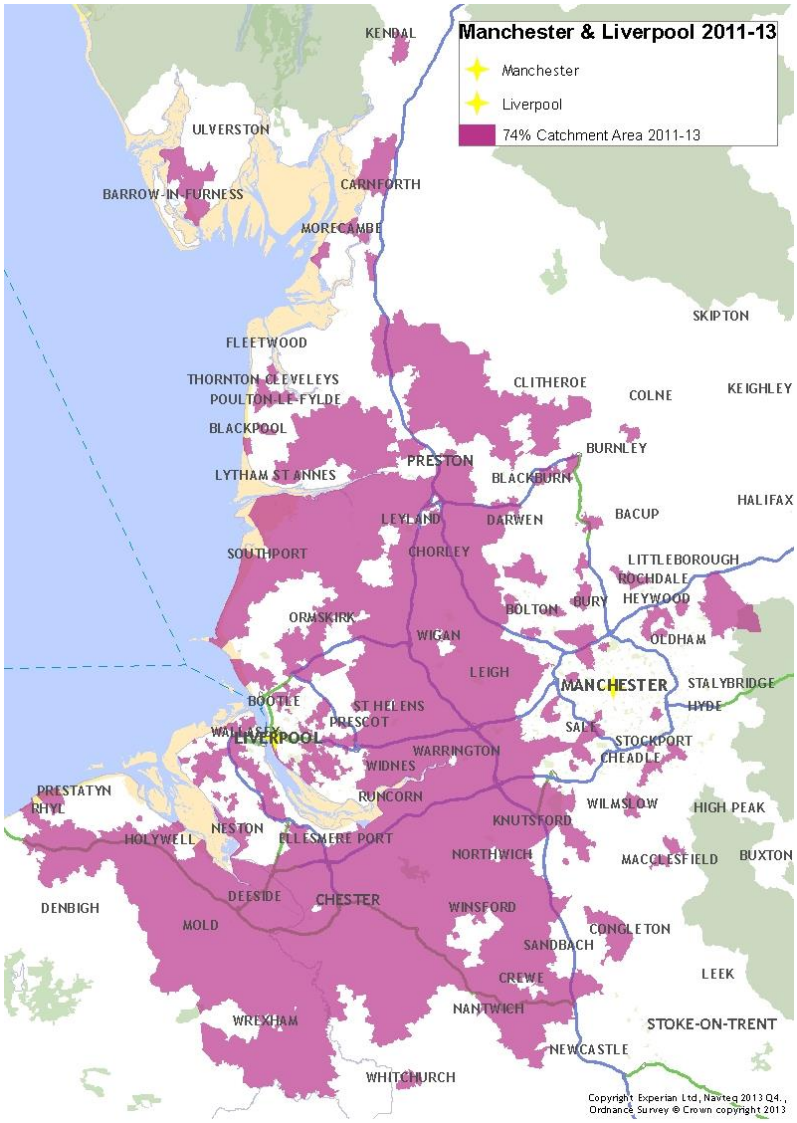
Map 3 and map 4: ATG Manchester catchment areas for 2011 and 2013



During the same period, whilst the audience at ATG's Liverpool Empire Theatre grew from around 50,000 attendances to over 80,000 attendances, the catchment area for The Empire remained virtually unchanged over that time. The Empire Theatre increased its market penetration, drawing a greater audience from within effectively the same catchment area, whilst the Manchester ATG venues increased their audience and increased the size of the catchment area, effectively expanding their market.

In terms of where the crossover audience is coming from, *Map 5* shows the catchment area created for bookers that booked for performances in both Manchester and Liverpool between 2011 and 2013. This footprint of the core crossover audience shows that they are drawn largely from the hinterland between and around Liverpool and Manchester in a corridor extending from Southport, through Chorley, Wigan, Warrington, and Chester to Mold. If this catchment area is compared based to the respective data for 2011 audiences and 2013 audiences, it looks consistent over the period in terms of overall shape and has actually grown a little (just as the ATG Manchester venues' catchment areas has) from an area encompassing 1.0 million households in 2011 to a similar, but slightly expanded area comprising 1.1 million households. This again indicates that the size and reach of the crossover audience has also grown over the period covering the changes in the nature/scale of event programming.

Map 5: ATG Manchester/Liverpool crossover bookers 2011-13, catchment area map



What do we know about the types of people attending and how that has changed?

The *Audience Spectrum* profiles of the audiences for ATG's Manchester venues in 2011 and 2013 over the period in which the blockbuster-style event programming was introduced shows that whist the numbers of people attending has increased, the type of people attending - the audience profile - has remained very similar. *Table 14* shows that there is virtually no percentage change in the proportional representation of most *Audience Spectrum* groups and any change at all is only observed for three groups: *Commuterland Culturebuff*s, *Experience Seekers*, and *Facebook Families*. In these cases the percentage change in the representation of those groups in the ATG Manchester venues' booker profile is never more than 1%.

Table 14: Comparison Audience Spectrum profile between audiences for ATG Manchester venues' events in 2011 and 2013

	ATG Manchester venues 2011 booker profile		ATG Manchester venues 2013 bookers profile		
Group Name	Count	%	Count	%	% Change
Metroculturals	1563	1%	1,528	1%	0%
Commuterland Culturebuffs	28223	20%	34,698	18%	-1%
Experience Seekers	9501	7%	13,866	7%	1%
Dormitory Dependables	35202	25%	46,458	24%	0%
Trips & Treats	29515	21%	39,941	21%	0%
Home & Heritage	11903	8%	15,572	8%	0%
Up Our Street	8728	6%	11,914	6%	0%
Facebook Families	13133	9%	18,785	10%	1%
Kaleidoscope Creativity	2726	2%	3,810	2%	0%
Heydays	2856	2%	3,864	2%	0%

It is noteworthy that the overall profile of audiences at ATG's Manchester venues is significantly different to the profile of MIF, and also (to a lesser extent) of The Lowry. The chief differences are characterised by lower representations of both *Metroculturals* and *Experience Seekers* in the ATG profiles, and greater representations of *Dormitory Dependables*, *Trips and Treats* and *Facebook Families*

5. Daytime exhibitions

In order to inform planning for the type of large-scale exhibitions that are proposed for The Factory's programme, survey data from attenders to 11 similar high profile exhibitions taking place between 2012 and 2014 has been combined to build up a significant body of audience data. These audiences were surveyed at major exhibitions (such as "Damien Hirst", "David Bowie is", "Lichtenstein: A Retrospective" and "The Sunflowers") taking place at the following galleries/museums:

- The V&A
- Tate Liverpool
- Tate Modern
- Tate Britain
- National Portrait Gallery

In total, 1,884 audience surveys from these exhibitions have been analysed to enable an understanding of the geographical audience reach of such work, and the profile of attenders.

Major Exhibitions: Audience Reach

Analysis of the audiences to these major exhibitions revealed that over 31% of the total audience was comprised of visitors from overseas. The proportion of overseas visitors per exhibition varied from a low of 15% of overseas visitors (for "Chagall: Modern Master" at Tate Liverpool, and "Lowry and the Painting of Modern Life" at Tate Britain) to a high of 42% (for "Damien Hirst" at Tate Modern, "Picasso and Modern British Art" at Tate Britain, and for "The Sunflowers" at the National Portrait Gallery).

Of the UK visitors to these major exhibitions, drive-time analysis reveals a much wider geographical reach than The Lowry, or MIF audiences reveal. 45% of all UK visitors to these major exhibitions are resident more than 60-minutes' drive-time away from the gallery where they visited an exhibition, and well over a third (36%) of attenders travelled from over 90-minutes. Only 29% of visitors to such major exhibitions are resident within 30-minutes' drive-time of the exhibition that they visited. Even if a 90-minute drive-time contour was taken as a realistic catchment area for such exhibitions (and this analysis suggests, with a significant proportion of the audience travelling from farther afield, that a 90-minutes' drive-time is in fact a conservative estimate) then applied to Manchester that area would contain a an adult

population approaching 10 million[16], and a marketplace of people who currently attend art galleries and exhibitions of more than 2.3 million[17] people.

Major Exhibitions: Audience Reach – Manchester context

Whilst it has not been possible within the parameters and timescale of this analysis to gather directly comparable audience data for major art exhibitions staged in Manchester, it is possible to make reference to audience research conducted by Morris Hargreaves MacIntyre (MHM) for the Manchester Museum Partnership (MMP) in 2013/14 for audiences visiting The Manchester Museum, Whitworth Art Gallery, Manchester Art Gallery, People's History Museum, The National Football Museum and Cornerhouse.

This work cited *Visit Britain*'s identification of Manchester as the third most visited city in the UK by overseas visitors in 2012, behind London and Edinburgh, and ahead of Birmingham and Liverpool. Research work by *Visit Manchester* was also cited which identified that visiting cultural attractions was amongst the most frequently undertaken activities for Manchester City Centre visitors in 2010.

MHM's research included analysis of the origin of a sample of the 1.5 million visitors to the six reported galleries in 2013/14, concluding that 70% of visitors were drawn from the North West region, 19% were drawn from the rest of the UK and 10% were drawn from overseas. This represents a smaller proportion of overseas visitors, compared to the 31% identified as visitors to the sample of major exhibitions but is likely to be reflective of a much less high profile offer. The likely proportion of overseas visitors to a higher profile offering could well fall between the 10% currently achieved by the existing art galleries and museums in Manchester and the 31% achieved in the sample of audiences to major, large-scale exhibitions.

It is difficult to make a direct comparison between the breakdown presented in MHM's work showing that 70% of the MMP visitors came from the North West region, and 19% coming from elsewhere in the UK, with the drive-time analysis identifying that 36% of visitors to the sample of major exhibitions travelled from farther away than 90-minutes.

It would be a very instructive next step to obtain and analyse the MMP postcode data in the same format of drive-time analysis to get a more directly comparable indication of the distribution of current audiences to exhibitions in Manchester. Whilst MHM's report on MMP

[16] Census data from Area Profile Report+, population 15+ = 9,807,747

[17] TGI data from Area Profile Report +, Art Galleries = 2,323,479

visitors also details some demographic characteristics[18], it would again be an instructive next step to be able to profile those visitor postcodes using *Audience Spectrum*, to make the audience analysis more directly comparable to the audience profiling analysis presented throughout this report.

Major Exhibitions: Audience Profile

The *Audience Spectrum* profile of surveyed attenders to the eleven major exhibitions analysed is dominated by just four groups that together make-up more than 70% of all surveyed attenders. These are, *Metroculturals* (26%), *Commuterland Culturebuffs* (19%), *Experience Seekers* (14%) and *Dormitory Dependables* (12%), as seen in *Table 15:*

Table 15: Major Exhibitions Audience Survey – Audience Spectrum Profile

Major Exhibition Visitors Audience Spectrum Profile					
Group Name	Number Major Exhibition Visitors Surveyed	% Major Exhibition Visitors Surveyed	Number Manchester 90-minute drive-time households	% Manchester 90-minute drive-time households	Index
Metroculturals	227	26.4%	19,660	0.2%	13,200
Commuterland Culturebuffs	166	19.3%	931,306	9.7%	199
Experience Seekers	122	14.2%	519,457	5.4%	263
Dormitory Dependables	102	11.9%	1,525,336	15.8%	75
Trips & Treats	43	5.0%	1,880,628	19.5%	26
Home and Heritage	72	8.4%	795,387	8.2%	102
Up Our Street	24	2.8%	904,457	9.4%	30

[18] Age:<16 - 23%, 16-24 - 14%, 25-44 - 35%, 45-64 - 20%, 65+ - 8%. Ethnicity: 90% - white, 8% - BME, Disability: 7%, Social Status: 15% c2, d, e

Facebook Families	16	1.9%	1,836,980	19.0%	10
Kaleidoscope Creativity	64	7.5%	671,488	7.0%	107
Heydays	3	0.3%	558,815	5.8%	5
			9,643,514		

These four groups are the most active attenders of arts and cultural events so it is to be expected that they should dominate such an audience profile. It has been observed in the profiles of the MIF 2013 and The Lowry 2012/13 events that *Commuterland Culturebuffs*, *Experience Seekers* and *Dormitory Dependables* are typically amongst the largest represented groups for significant proportions of the offering. The distinction between these major exhibitions' audience profile and those observed for the Manchester organisations' events is the predominance of *Metroculturals* in the major exhibitions profile. There is a strong likelihood that this feature of the profile is largely reflective of the fact that many of the major exhibitions included in this survey sample took place in London where the incidence of *Metroculturals* is much higher. For comparison, the representation of *Metroculturals* in the Snapshot London Visual Arts *Audience Finder* cluster benchmark[19] for 2013/14 is 33% of all visitors surveyed across all 30 galleries. It is unlikely that exhibitions staged in Manchester would have such high proportions of *Metroculturals*. Nonetheless, *Metroculturals* should form a not insignificant proportion of the audience for major exhibitions at The Factory. That will be an over-representation of their presence in the Manchester catchment area (i.e. higher proportions of those that live in the area will attend in comparison with the situation for most, if not all, other *Audience Spectrum* groups and many more *Metroculturals* from beyond the local area should be attracted to attend). There are less than 20,000 *Metroculturals* households within 90-minutes' drive-time of Manchester which represents just 0.2% of the total population within that area. Even though they are comparatively over-represented in the audience profiles for work at The Lowry and even more so at MIF 2013, given the relatively small proportion of *Metroculturals* households their representation in any of those audiences never exceeds 10% of the audience for any programme strand. The need for growth in the numbers of *Metrocultural* households attending could be a significant challenge in developing audiences for contemporary work.

[19] This is the London visual arts *Audience Finder* cluster, which is comprised of 30 galleries of various scales. A benchmark audience analysis of their combined weighted survey results is produced annually.

The bulk of the audience for major exhibitions in Manchester will very likely be drawn from the *Audience Spectrum* groups *Commuterland Culturebuffs*, *Experience Seekers* and *Dormitory Dependables,* of which in total combination there are almost 3 million households within the 90-minute drive-time catchment area.

The major exhibitions' *Audience Spectrum* profile also suggests that *Home and Heritage*, *Kaleidoscope Creativity* and *Trips and Treats* will form potentially significant audience segments for such work, and again there are very significant numbers of households in these groups resident within a realistic drive-time for a major exhibitions offer in Manchester (are almost 800,000 *Home and Heritage* households within 90-minutes' drive-time, over 670,000 *Kaleidoscope Creativity* households and more than 1.8 million *Trips and Treats*). However, effective event programming and marketing/audience development planning to attract these groups would need to be mindful that the marketing mix is reflective of their cultural engagement characteristics and preferences.

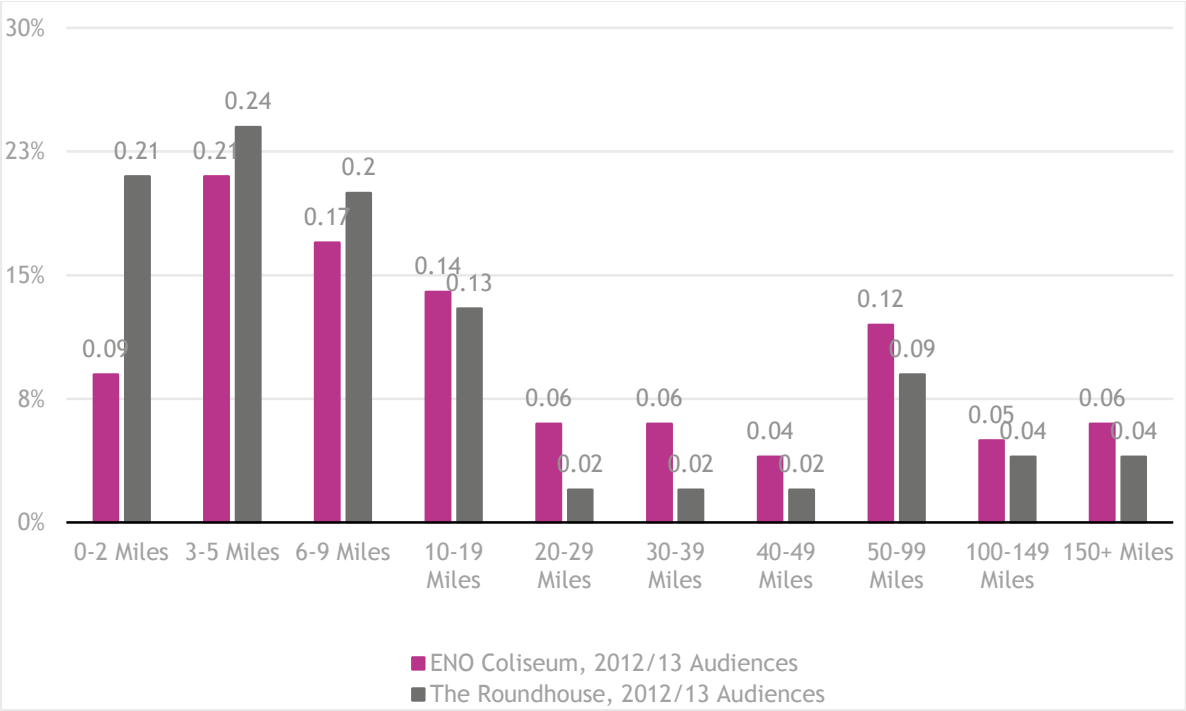
6. Cultural Capital Venues

London

In order to gain further comparator information into the possible likely geographical reach of the planned programme at The Factory, it is possible to look at the geographical distribution by drive distance of audiences to events at The Roundhouse and the ENO's Coliseum in London. These analyses are measured in drive distance rather than drive-time as the particular road congestion and transport infrastructure context in central London mean that analysis of distance travelled, rather than time taken to drive, are usually more illuminating.

Chart 3 shows that there is some considerable difference between the distances travelled by audiences visiting The Coliseum and The Roundhouse. Essentially, the Coliseum attracts greater proportions of its audience from the longer travel distance bands. Only 30% of the audience at The Coliseum travel from within five miles' distance of the venue, compared with 45% of the audience at The Roundhouse. The Roundhouse also has a greater proportion of the audience that travels between six and nine miles but The Coliseum has a higher proportion of its audience travelling from all the distance bands greater than ten miles. Notably, nearly a quarter of the Coliseum's audiences (23%) travel more than 50 miles to events, whereas 17% of The Roundhouse's audience travels from those distances.

Chart 3: Drive distance travelled by audiences to The Roundhouse and The Coliseum



This is indicative that there is likely to be a range of useful comparative scales of geographical reach but the common feature between these audience footprints is the fact that there are very significant local and much more remote audience segments, but that beyond ten miles' travel distance the size of those segments initially falls off sharply, before the rate of decline tails off and starts to flatten out as distance increases.

Appendices

1. Consultation

List of those consulted in informal interviews

Maria Balshaw, Manchester Galleries

Joanna Baker, Edinburgh Festivals

Alison Clark, Arts Council England

Christine Cort, Manchester Int Festival

Marcus Davey, The Roundhouse

Julia Fawcett, The Lowry

Sally MacDonald, MOSI

Duncan May and Julia Potts, ATG

Ruth McKenzie

Nick Merriman, Manchester Museums

Dave Moutrey, Home

Helen and Andrew Palmer, Palmer Squared and Creative Tourist

Julia Peyton-Jones, Serpentine Gallery

Alistair Spalding, Sadlers Wells

Geoffrey Worsdale, Baltic

Taking part in consultation session on 27 March 2015

Maria Balshaw, Manchester Galleries

Terry Carnes, Live Nation

Alison Clark, Arts Council England

Jonty Claypole BBC

Christine Cort, Manchester Int Festival

Julia Fawcett, The Lowry

Matt Fenton, Contact

Roddy Gauld Bolton Octagon

Fiona Gasper Royal Exchange.

Nick Merriman, Manchester Museums

Andrea Nixon, Tate Liverpool

Alex Poots, MIF

Julia Potts, ATG

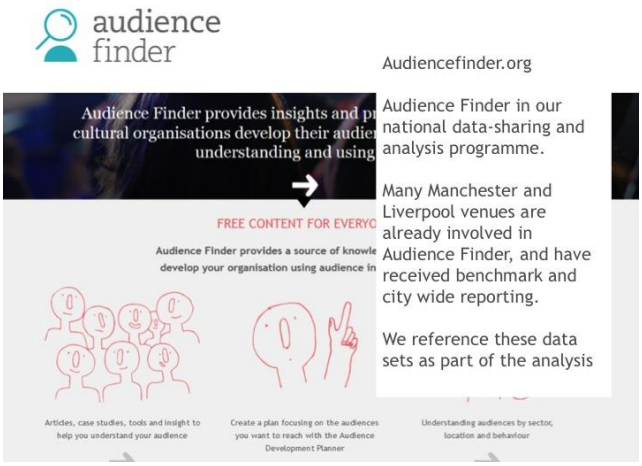
Nick Reed, Bridgwater Hall

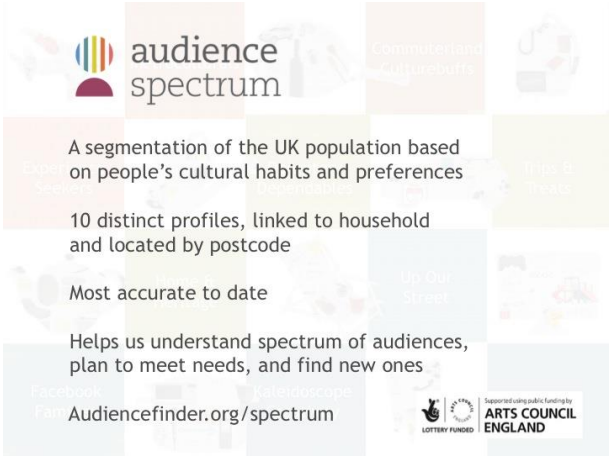
John Summers, Halle

Bob Riley, Manchester Camerata

2. Presentation given at consultation

Whitworth, 27 April 2015





Medium engagement

- Dormitory Dependables
- Trips and Treats
- Home & Heritage
- (Kaleidoscope Creativity)

Risk-averse, not culture-averse
Location and lifestage are critical

Less engagement

- Kaleidoscope Creativity
- Up Our Street
- Facebook Families
- Heydays

Lack of interest AND lack of resources?

MiF Audience Behaviours

- MiF audiences are different…
- Regular engagement
- Higher average spend per ticket
- Lower average customer value (lower group size
- MiF – higher frequency of attendance – even over one month
- Super attenders – 9% bookers - 37% of tickets, 28% of revenue
- Eclectic tastes – greatest cross-over between *Contemporary and Classical* events.

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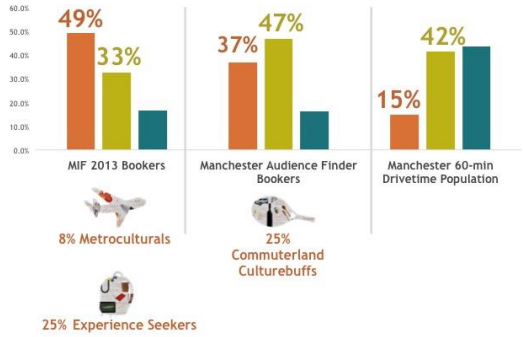
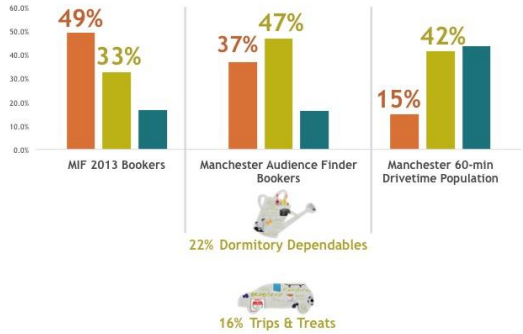
MiF Audience profile: Highly Engaged Groups



MiF Audience profile: Medium Engaged Groups



Key group: Experience Seekers

3 Opportunities

Opportunities

- New audiences, bigger audiences?
- The Whitworth Effect?
- A driver for collaboration?

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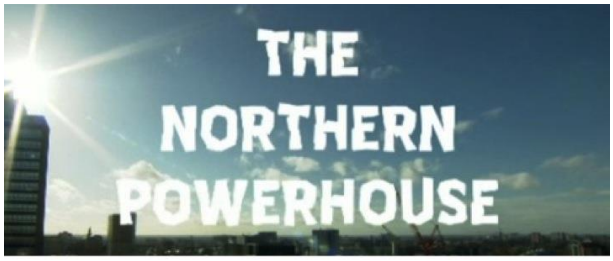

Driver for collaboration?

Ideal conditions, existing partnership + shared opportunity
Repositioning, messaging Manchester
High, new levels of co-operation -
Anti-clash, audience sharing, route-planning
Differentiated offers, joined up offer
Develop offer for less engaged, further afield

New Audiences, bigger audiences?

- Yes but with qualification…
- Many eg.s increased supply = net increase in demand
- Seats per capita: 253 v London 70
- New audiences, old profile?
- Increase frequency and penetration
- New audiences, new profile?
- Develop "metrocultural" tastes and habits
- Alternative programming/ comms less engaged audiences
- Tourism - slow-burn, repositioning NW
- Catchment area - wider north?

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3 Risks

Risks

- Competition for contemporary audiences
- Competition for product
- Funding implications

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Risks

Competition

- Large scale venues notorious for high financial risks, especially from overheads, repairs and maintenance, and capital renewals
- Reliance on hire and rental income for part of the year vulnerable to competition and challenge of under-cutting
- Criticality of hitting margins for retained income

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Risks

Competition for contemporary audiences

- Reliance of some organisations for most Highly Engaged attenders for audiences for contemporary work - core in demand
- Current public profile in the North West has low proportions of Metroculturals, most significant source of attenders for contemporary work
- Audience development strategy needed to build and sustain audiences for contemporary work

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Risks

Funding implications

- High level of subsidy required from ACE & MCC; must be sustained to ensure artistic policy can be pursued
- Likely short-term impacts on some venues in competition for audiences and displacement effects
- Need to support quality lyric theatre and national touring productions e.g. RSC and NT and more co-productions on the large scale.

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Risks

Competition for product

- Potentially high risk of drawing programming from existing venues - the outline MIF programme already includes work previously seen at The Lowry
- Possible displacement effects when programming is drawn away from venues and replaced with less commercially attractive productions
- Insufficient subsidised quality lyric theatre and national touring productions e.g. RSC and NT

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3. Background Information

The Audience Agency

The Audience Agency is a national charity with strong regional roots working with cultural organisations to grow audiences. With offices in Manchester and London and a network of Regional Directors across England, The Audience Agency provides unparalleled service built on in-depth knowledge and understanding of the cultural sector. Generating insight and evidence to inform individual and organisational decision-making and to help to grow a more sustainable cultural economy. www.theaudienceagency.org

Audience Finder

Audience Finder is a programme delivered by The Audience Agency with the aim of supporting cultural organisations to reach more people, new audiences and greater efficiency. It is a combined data-sharing and capacity development programme. Analysis combines customer and behavioural data fed from box office systems, online interactions and a primary research survey exploring motivations and opinions. Participating organisations access their reporting through a discrete dashboard, comparing metrics with others in collaborative "clusters" based on geography or sector. Much information will be made available as open data. At June 2014, 550+ organisations have joined the programme; we anticipate that the programme will bring together up to 800 organisations by 2016. The box office data-sharing platform is developed by Baker Richards in partnership with Jacobson Consulting Applications Inc. of New York.

Audience Finder is an initiative commissioned by Arts Council England as part of the £3m Audience Focus strategic fund (strand 1 "Understanding Audiences") launched in 2012. It is an ambitious 'Big Data' project for the arts that seeks to bring real insight and change practice. www.audiencefinder.org

Audience Spectrum

Audience Spectrum is being developed as part of the Audience Finder programme funded by Arts Council England as part of its strategic Audience Focus fund.

The development of *Audience Spectrum* draws together some of the largest and most robust sources of information about people and how they engage with arts and culture, including:

- The Taking Part Survey - the long established DCMS survey into people's leisure, culture and sport.
- Experian - lifestyle, consumer and demographic information drawn from over 850 million input sources and 400+ variables, and including Mosaic and the online analytics tool, Hitwise.
- Proximity Indices - The Audience Agency's national overview of how well local populations are served by cultural provision.
- Audience Finder - the largest growing Big Data set in the cultural sector about audience behaviour, built on ticketing and research information.

We have used these information sources to make Audience Spectrum a tool that categorises people first and foremost on how they engage with culture in a way that is very locally applicable.

As the Audience Finder Big Data set grows, we will learn more about each of the Audience Spectrum segments, adding depth, knowledge and new ways of applying these insights to grow audiences.

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