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Additional Analysis

Understanding the potential impact of The Factory on public engagement

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Contents

Introduction

Following dissemination of the report, we invited those stakeholders who had contributed data to comment on the report. This addendum includes those comments and some additional analysis commissioned in response to the report. It is important that this addition is considered only in the context of the full *Understanding the potential impact of The Factory on public engagement* report.

Comments from stakeholders

Three organisations (Ambassadors Theatre Group (ATG), The Lowry and Manchester International Festival (MIF)) generously made audience data available to the team for this study, and we have invited their comment as an important aspect of the report. This is included as a summary here. We have reviewed our conclusions in the light of comments, and any factual inaccuracies noted have been amended.

Both ATG and The Lowry note their unease that the report can only speculate about The Factory's **potential impact on existing provision** and these comments have been passed on to Arts Council England.

Stakeholders have pointed out that the festival analysed in greatest depth in the report, **MIF 2013, was a-typical**, taking place in a disproportionate number of found spaces, and/or with a distinctive event-appeal. This further supports the conclusion that to reach an alternative audience, The Factory will have to programme consistently alternative forms of content, which speak more directly to the *Experience Seeker* market. This issue is addressed in the analysis reported on below.

The report makes much of the "ground-breaking levels of **collaboration**" required, and some question the ability of the sector, especially the commercial sector, to work in this way. All ask, what could be done to encourage a collaborative approach; what is the nature and what the implications of the co-operation we suggest?

In response to our conversations with stakeholders, and in addition to this report, we have also made suggestions to Arts Council England for further analysis to explore:

- Relevant issues beyond the scope of our work
- Other risks as noted to us
- Omissions highlighted
- The nature of activity most likely to meet potential

Additional Analysis

To address some of these comments, Arts Council England commissioned some additional analysis, to understand how far the events of MIF 2013 were atypical, including those that took place in “found spaces”, and to address the fact that MIF and Lowry comparisons were for different time periods. So, this analysis explores whether conclusions can be upheld because:

- audiences for MIF 2015 are similar from those for MIF 2013
- audiences for MIF in 2015 are again different from those attending Lowry 2015 events
- there is as low a crossover of audiences for MIF 2013 with concurrent 13/14 Lowry events

Does the additional analysis contradict or support the overall report?

In our view, overall this additional analysis fully corroborates the conclusions of the phase 2 report. MIF does have a distinct audience profile, and there are many people of this profile within its large catchment area. The MIF audience profile is distinctive from The Lowry’s and indeed from other Manchester venues. This is especially the case when it programmes distinctively.

Summary of Key Conclusions of Analysis

- Audience profiles using *Audience Spectrum* of MIF audiences 2013 and MIF 2015 indicate a high degree of consistency: similar people attended both festivals.
- The audience profile of The Lowry's overall audience from 2012/13 to 2013/14 is also consistent: similar people attended the Lowry in both years[1].
- Any small shifts in profile in both cases show a slight increase in the number of lower engaged groups.
- MIF 2015 programming saw an increase in the number of *Classic* events, and complete omission of any of locally influenced (ie *Made in Manchester* or *Contemporary – Prodigal NW* genre).
- Classic events at MIF attract a profile of audience a bit more like that of the Lowry's classic audience.
- The proportion of The Lowry's programme categorised as *Classic* events has increased significantly in 2013/14 and 2015 to-date. Over 60% of The Lowry's audience attends *Classic* style events.
- *Contemporary – Only at MIF*, the genre most unique to MIF with the audience profile most exclusive to MIF, remains its largest programme offering and audience draw, with the most distinctive audience.
- These points all stress the need for MIF to programme distinctive "MIF" works on a sustained basis.
- The proportion of The Lowry's programme categorised as *Contemporary – New* (and comparative *Contemporary – Only at* MIF) has also grown slightly.
- The Lowry's growth in this area, together with the increase in the proportion of the programme and audience for *Classic* events at MIF 2015, indicate small shifts by both organisations towards each other's respective core programme audiences – which possibly represents developing potential for collaboration/competition.
- Despite this convergence of programme style, crossover remains low.
- Overwhelmingly, similar *Audience Spectrum* types of people were attending similar types of events from MIF 2013 to MIF 2015. The greatest degree of change in audience profile across the MIF genre is seen in *Classic* events, where there are slightly fewer of the highly engaged *Commuterland Culturebuffs* and *Experience*

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[1] note there are some marginal changes in the profile of audiences to events at The Lowry in the 2015/16 year to date. These might arise in consequence of analysis of the incomplete years' dataset.

Seekers in 2015 than previously seen, and slightly more of the middling engaged *Trips and Treats* and the lower engaged, *Facebook Families*.

- *Experience Seekers* (the *Audience Spectrum* group most peculiar to MIF) still account for a fifth of the *Classic* event audience at MIF, in comparison with just 7% of the *Classic* event audience at The Lowry.
- Looking at audience profile by genre in The Lowry's programme, the greatest changes also occur in the *Classic* event profile, where proportionately far fewer of the highly engaged *Commuterland Culturebuffs* appear in 2013/14 and 2015/16 than in 12/13, and where more of the middling/lower engaged groups appear.
- Almost exactly the opposite effect is seen in the profiles of audiences for *Contemporary – New* and *Made in Manchester* events at The Lowry.
- MIF 2015 audience reach also remains broadly similar, with only a small decrease noted in the proportions of people drawn from farthest away. *Contemporary – Only at MIF* events remains the genre with the broadest significant geographical reach, and the *Classic* event genre draws most significantly, for MIF, from the "hinterland" 30-60-minute drive-time doughnut around Manchester, which is also a very significant market base for The Lowry's *Classic* audience.
- The Lowry's audience reach in 2013/14 and 2015/16 is very similar to the picture in 2012/13, save only that there is a very small decrease in the proportion of those drawn from the most local areas and an accompanying very small increase in those drawn from farthest afield.
- There was a small decrease in people attending more than one MIF 2015 event compared to 2013. Frequency of attendance in The Lowry's audience actually increased slightly in 2013/14 (the year in which there was a MIF) in comparison with the previous year. Overall, the frequency profiles look very similar, and it remains the key feature that the month-long MIF generates a similar frequency profile amongst its audience to that of the year-round programme at The Lowry.
- Genre cross-over patterns in both MIF and The Lowry look very consistent, notwithstanding the impact of changes arising from the scale of *Classic* events in the programme of both respective programmes.

MIF 2015

Analysis of MIF 2015 event audiences is based on data provided by the Ambassador Theatre Group, which provided ticketing services for the 2015 festival. A proportion of ticketing data for bookers to three MIF 2015 events[2] which took place at venues that also provided their own ticketing services for those respective events in addition to ATGs ticketing services is not included in this analysis. (Detailed analysis of that data is beyond the scope of this present work, however, The Audience Agency has been able to take a very brief overview of it – as the data sits within participating *Audience Finder* organisations – and it reveals that the profile of the audiences for those MIF events is more akin to the overall audience profiles of the respective venues in which the events are taking place, suggesting that there is a dimension to what partner venues bring to MIF in terms of audience profile and reach, that should be better understood in the future and which should form a part of ongoing planning.) The analyses presented here are based solely on the data supplied by ATG, which forms the vast majority of the MIF 2015 audience transactional dataset.

MIF 2015: audience size

In total there were 21,153 customer records for people who had booked tickets to events at MIF 2015 ticketed through ATG. Of these customer records, 18,807 had complete, full UK postcodes that were recorded upon booking and could be matched to the *Audience Spectrum* profiling classification for analysis. This represents a 7% increase in analysable booker records from the 2015 festival events over those of the 2013 festival (to which there were 19,810 bookers, of which 17,410 were UK residents with a valid UK postcode recorded).

Has the profile of audiences to MIF 2015 events changed in comparison with MIF 2013?

Table A1 compares the profile of bookers to MIF events in 2013 to the profile of bookers to MIF events in 2015. The comparison indicates that there is a relatively high degree of consistency between the profiles of the MIF audiences to 2013 events and those to 2015 events. Using the *Audience Spectrum* profiling classification, the percentage representation of six out of ten of the *Audience Spectrum* groups changes by less than 1% between the 2013 and 2015 festivals. Of the remaining four *Audience Spectrum* groups, in

[2] These events are: *The Skriker*, at The Royal Exchange Theatre; *Arvo Part*, at Bridgewater Hall; and *Neck of the Woods*, at Home.

2015 there are proportionately slightly fewer *Metroculturals* (1.9% fewer in comparison with 2013), and *Commuterland Culturebuffs* (1.6% fewer in comparison with 2013). There are corresponding increases in the proportions of those attending that are *Facebook Families* (2.4% greater representation in 2015 than in 2013), and *Up Our Street* (1.1% greater representation in 2015).

Table A1: MIF 2013 and MIF 2015 *Audience Spectrum* profiles compared

MIF 2013 and MIF 2015 Audience Spectrum Profiles Compared					
Group Name	No. MIF 2013 bookers	% MIF 2013 bookers	No. MIF 2015 bookers	% MIF 2015 bookers	% Difference
Metroculturals	1,455	8.2%	1,192	6.3%	-1.9%
Commuterland Culturebuffs	2,849	16.1%	2,733	14.5%	-1.6%
Experience Seekers	4,439	25.1%	4,633	24.6%	-0.5%
Dormitory Dependables	2,791	15.8%	2,915	15.5%	-0.3%
Trips & Treats	2,283	12.9%	2,596	13.8%	0.9%
Home and Heritage	680	3.8%	866	4.6%	0.8%
Up Our Street	822	4.6%	1,080	5.7%	1.1%
Facebook Families	1022	5.8%	1,532	8.2%	2.4%
Kaleidoscope Creativity	900	5.1%	998	5.3%	0.2%
Heydays	169	1.0%	262	1.4%	0.4%

Has the profile of audiences for different strands of work at MIF changed?

In order to aid comparison with previous analysis, the programme of events for MIF 2015 has been coded using the same genre classification as was applied to the 2013 programme of events in the original analysis. ***Table A2*** details the proportion of the overall audience in each respective year that attended events within each genre category. The results presented in the table reflect a combination of the programming style for each respective year of MIF, and the proportion of the audience attracted to the events on offer in each genre.

Table A2: MIF audience size by event genre

Category	Description	2013 Number of Bookers	2015 Number of Bookers
Classic	Block-buster works/ artist, known cannon - EG: international opera, ballet, Kenneth Branagh - “Macbeth”	28%	39%
Contemporary: Prodigal NW	High-profile artists, works, partnerships with a NW connection, e.g. Delphic, M O N E Y, The Masque of Anarchy	18%	0%
Contemporary: Only at MIF/ The Factory	Surprising new collaborations/ experimentation celebrated contemporary stars: e.g. Massive Attack v Adam Curtis, Goldfrapp, Michael Angelo Sonnets	60%	58%
Made In Manchester	Community-created/ engagement e.g. Sacred Sounds Choir	2%	0%
Creative Learning	Educative, participatory and workshops e.g. Introduction to Bee Keeping, The Biospheric Project - Family Food Weekend	3%	2%
Club Nights	Celebrity DJs, club/dance music e.g. - Yellow, Despacio	8%	6%
Other	Catch all	4%	7%

There are some notable changes in the proportions of people booking for particular genres, however these have largely to do with the programming style of each respective festival, and/or the manner in which events are categorised. The most striking differences reflect the fact that in the 2015 festival (in contrast to 2013) no events were programmed or categorised within the genres, *Contemporary: Prodigal NW* or *Made in Manchester*. Perhaps this is related to the observation already noted about the extent to which events in MIF 2013 were linked to “found spaces” in Manchester. In 2015 there were no bookers for events in either category, whereas in 2013 these such events attracted 18% and 2% respectively of all bookers that year.

Otherwise the principal notable difference in MIF 2015 is that a greater proportion of bookers attended events categorised as *Classic* - 39% of all MIF 2015 bookers attended a *Classic* event, compared with 28% in 2013. This is a notable difference when considered in the light of the following analysis of The Lowry’s audiences in 2013/14 and 2015 to-date, because of the considerable proportion of The Lowry's audience that attends *Classic* events, and the potential for a situation where programming is targeted towards common audiences or audience types. The following detailed analysis of the types of people that book for each different programme strand increases the understanding of this scenario.

Otherwise, the proportions of people attending *Contemporary: Only at MIF/The Factory*, *Creative Learning*, *Club Nights* and *Other* events has remained comparatively stable. That *Contemporary: Only at MIF/The Factory* is by far the largest attraction for audiences in the MIF programme (approximately 60% of all MIF bookers attend these events) should be reassuring for other potentially affected organisations, as this is the genre that contains events of the style most distinctive to MIF, and for which, analysis has shown the audience make-up is most unique to MIF. (Although, as it's already been noted sustaining this "distinct" audience will not be without challenges or implications for MIF itself.)

We've seen that there have been some changes in the numbers of people attending events of some genre types in MIF 2015, but has the profile of attenders to the different genres changed? ***Table A3*** shows the profile of bookers to each of the MIF programme strands expressed in percentage terms for 2015, alongside the 2013 profile percentages, along with a column for each genre highlighting the difference between the profiles of the two years.

The table shows that in overall terms the peculiarities of profile particular to each genre are in broad terms similar to those observed in MIF 2013 audience profiles. For example, Contemporary – Only at MIF events is still the genre attracting the largest audience and is also the greatest draw in numerical terms of *Experience Seekers* and *Metroculturals*. However, there are some interesting changes to note.

- **Classic –** The overall shape of the audience profile for *Classic* events in 2015 was broadly similar to that of 2013, when it was observed that *Experience Seekers* were the largest *Audience Spectrum* segment for *Classic* events, but that also this was the genre in which they were least well represented. Both of these points are true again in 2015, but the share of *Experience Seekers* of the *Classic* event audience has dropped by 4% from 23% of *Classic* event bookers in 2013 to 19% of *Classic* event bookers in 2015. *Commuterland Culturebuffs* were the next biggest group of bookers for *Classic* events in 2013, but their share of *Classic* audience profile has also fallen in 2015 from almost 20% in 2013 to just less than 13% - the biggest percentage change across the *Classic* audience between the two festivals. The representation of both *Dormitory Dependables* and *Trips & Treats* evidences a lesser degree of change, but these are now jointly the second most well represented groups of bookers for *Classic* events, accounting between them for slightly more than a third of all *Classic* event bookers in 2015. There is also a notable rise in the proportion of *Facebook Families* attending *Classic* events in 2015 – rising from 5.1% of the audience for *Classic* events in 2013 to 11.2% in 2015. This rise in the share *Facebook Families* is almost as great as is the decline in the proportion of *Commuterland Culturebuffs* and it is perhaps those two features that mark the most notable changes between the *Classic* audience profiles of the two festivals. Excepting the already noted changes between the events categorised as either *Contemporary - Prodigal NW* and *Made in Manchester*, the *Classic* event genre is the one in which the audience profile exhibits the largest degree of change between the 2013 and 2015 festivals. And this of course accompanies the fact that this is also the genre in which the greatest change (increase) is noted in the numbers of people attending year on year.

- **Club Nights** – in contrast to *Classic* events, the *Club Night* genre is the one in which *Experience Seekers*, the *Audience Spectrum* segment most particular to MIF, are observed to dominate the booker profile to the greatest degree – this is again true for MIF 2015. In fact, the proportion of the audience for *Club Nights* increases from just over a third (35.6%) in 2013 to more than 40% in 2015. Otherwise, changes to the profile of *Club Nights* are of lesser magnitude, with any other changes between the representation of all the other groups measuring less than 2%. These are largely summarised by small decreases in the representation of all the middling engagement groups (*Dormitory Dependables, Trips & Treats* and *Home & Heritage*) accompanied by similar small increases in the representation of the groups, *Kaleidoscope Creativity* and *Commuterland Culturebuffs*.
- **Contemporary - Only at MIF -** is perhaps the genre that most defines the programming style and the audience profile that is particular to MIF. *Contemporary - Only at MIF* draws the greatest overall audience (60% of all MIF bookers), and it has the audience profile most particular to MIF. It is also the genre that experiences the least degree of change between the audience profiles of the 2013 and 2015 festivals. The largest single *Audience Spectrum* group is still *Experience Seekers*, and indeed their audience share has grown slightly in this genre from 27% to 28%. This is also the genre in which the group *Metroculturals* is proportionally most well represented, with almost 8% of the audience – although their share had dropped slightly, by -1.8% year on year - a change broadly in line with the representation of *Metroculturals* in the MIF 2015 profile as a whole. *Commuterland Culturebuffs* remain the second most well represented group in audiences for

Contemporary - Only at MIF events. Changes in all other groups measure 1% or often significantly less.

- **Creative Learning –** there are some moderately small percentage changes between the *Creative Learning* booker profiles of 2013 and 2015, but these changes are observed in the by far the smallest audience group. Changes of approximately 4% or less are observed in an audience profile consistently comprising in the region of just 3% of all bookers. So, the actual numerical impact of these observed changes is very small indeed. Notwithstanding this, the chief changes observed in the *Creative Learning* as small increases in the proportions of *Experience Seekers* and *Metroculturals* and small decreases in the proportions of *Dormitory Dependables* and *Trips and Treats*. All other changes between the representations of any groups measure 1% or less.
- **Other –** the profile of the audience for the catch-all genre, *Other* remains exceedingly similar across 2013 and 2015, with only notable difference being an 8% increase in the proportion of *Experience Seekers*, largely realised by a corresponding 5% decrease in the proportion of *Kaleidoscope Creativity. Commuterland Culturebuffs* and *Trips and Treats* also exhibit small decreases (1.3% and 1.2% respectively) in the 2015 profile. Otherwise, the representation of all remaining groups is extremely similar.

Table A3: Audience Spectrum profiles by event genre for MIF 2015 and MIF 2013 compared

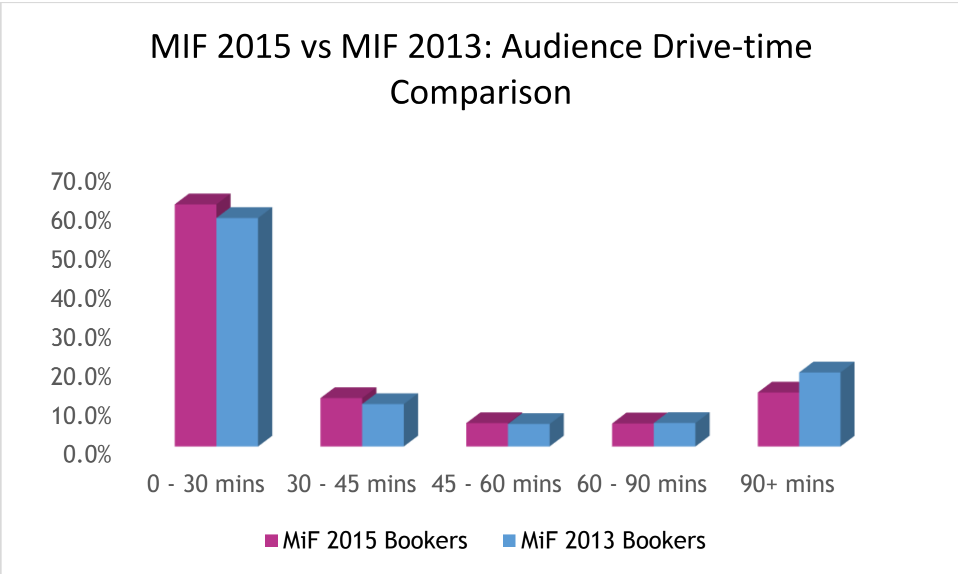
Group Name	Classic %			Club Nights %			Only at MIF %			Prodigal NW %			Creative Learning %			Made in Manchester %			Other %		
	2015	2013	% Diff.	2015	2013	% Diff.	2015	2013	% Diff.	2015	2013	% Diff.	2015	2013	% Diff.	2015	2013	% Diff.	2015	2013	% Diff.
Metroculturals	4.9%	7.7%	-2.8%	5.2%	7.1%	-1.9%	7.7%	9.5%	-1.8%	0.0%	7.0%	-7.0%	10.5%	8.3%	2.2%	0.0%	7.9%	-7.9%	7.4%	7.3%	0.1%
Commuterland Culturebuffs	12.8%	19.6%	-6.8%	12.1%	10.6%	1.5%	15.8%	15.3%	0.5%	0.0%	17.8%	-17.8%	14.1%	15.1%	-1.0%	0.0%	19.9%	-19.9%	16.2%	17.5%	-1.3%
Experience Seekers	19.0%	23.0%	-4.0%	40.0%	35.6%	4.4%	27.9%	27.0%	0.9%	0.0%	25.7%	-25.7%	31.6%	27.3%	4.3%	0.0%	22.8%	-22.8%	30.9%	23.2%	7.7%
Dormitory Dependables	16.2%	15.9%	0.3%	13.3%	14.5%	-1.2%	15.1%	14.1%	1.0%	0.0%	15.5%	-15.5%	12.5%	14.2%	-1.7%	0.0%	14.6%	-14.6%	14.8%	14.5%	0.3%
Trips & Treats	16.2%	12.4%	3.8%	10.0%	11.6%	-1.6%	12.2%	12.2%	0.0%	0.0%	13.4%	-13.4%	10.5%	14.2%	-3.7%	0.0%	11.1%	-11.1%	9.9%	11.1%	-1.2%
Home & Heritage	5.1%	5.3%	-0.2%	2.2%	4.0%	-1.8%	4.3%	4.6%	-0.3%	0.0%	4.0%	-4.0%	4.3%	5.0%	-0.7%	0.0%	4.4%	-4.4%	3.1%	3.4%	-0.3%
Up Our Street	6.6%	5.5%	1.1%	4.6%	5.9%	-1.3%	4.9%	5.4%	-0.5%	0.0%	5.7%	-5.7%	6.3%	5.2%	1.1%	0.0%	5.8%	-5.8%	5.1%	5.1%	0.0%
Facebook Families	11.2%	5.1%	6.1%	4.9%	5.8%	-0.9%	6.0%	5.4%	0.6%	0.0%	5.2%	-5.2%	4.3%	4.5%	-0.2%	0.0%	5.6%	-5.6%	6.1%	5.4%	0.7%
Kaleidoscope Creativity	5.9%	4.4%	1.5%	6.2%	4.6%	1.6%	5.1%	5.7%	-0.6%	0.0%	4.5%	-4.5%	5.1%	5.4%	-0.3%	0.0%	6.1%	-6.1%	5.7%	10.9%	-5.2%
Heydays	1.9%	1.1%	0.8%	1.5%	0.5%	1.0%	1.0%	0.9%	0.1%	0.0%	1.4%	-1.4%	0.8%	0.9%	-0.1%	0.0%	1.8%	-1.8%	0.8%	1.5%	-0.7%

Has audience reach changed for MIF 2015 events?

Drive-time analysis conducted on the MIF 2013 audience identified that MIF was successful in attracting both, (a) a core, local Manchester audience, and (b) a more geographically remote audience travelling longer distances in greater proportions than was generally the case for other arts organisations in Manchester.

MIF 2013 attracted both a greater proportion of its audience from within 30-minutes' drive-time than was the case for The Lowry and also for other arts organisations across Manchester (almost 60% of the MIF 2013 audience were resident within 30-minutes' drive-time of the events they attended, compared with 53% for both The Lowry and also for the combined audiences of other Manchester arts organisations). At the same time, MIF 2013 also attracted a greater proportion of its audience from furthest afield, with almost a fifth of all bookers to MIF 2013 events travelling more than 90-minutes to attend. (Indeed, for other Manchester organisations, fewer than 15% of all bookers travelled more than 60-minutes to attend, and for The Lowry this figure was 13%. So, has this geographical distribution changed for MIF 2015 audiences?

Graph A1



Graph A1 shows that the overall drive-time distribution pattern is broadly similar between the audiences for MIF 2015 and MIF 2013 with a couple of notable changes:

- the size of the audience travelling from furthest afield has fallen by 5%, from 18% for MIF 2013 to 13% for MIF 2015

- there has been a corresponding increase in the proportions of those people attending from the most local areas, mostly (+3.5%) from the <30-minutes drive-time area, but also a little from the next distance band, 30 to 45-minutes (+1.5%)

The proportions of the audience that MIF generates from the both the most local and furthest reaches are still in excess of those observed for other Manchester organisations, and for The Lowry. At the same time, it should also be noted that MIF continues to attract less of its audiences from the outlying areas between 30 and 60-minutes drive-time from Manchester centre.

These features are consistent with the small audience profile changes that have been noted between the 2013 and 2015 iterations of MIF. The slight reductions identified in the proportions of *Metroculturals* and *Experience Seekers*, both of which are comparatively poorly represented in the Manchester catchment area, corresponds with the reduction in the proportions of the audience that travels the greatest distances that is noted between 2013 and 2015. Moreover, the increases in *Facebook Families* and *Up Our Street* would also correspond with the corresponding increases in the proportion of the audience drawn from the most local areas, where these groups are well represented.

The scale of these differences are relatively small, and overwhelmingly the key features of the profile and reach of the 2013 MIF that were observed continue to prevail for the 2015 festival audience. However, the slight growth of the more local, and comparatively middling to less keenly pre-disposed toward arts attendance groups could be a helpful development for MIF in thinking about its ongoing challenge of continually managing to attract the most well-disposed arts attenders from farther afield, against the element of sustainability supported through the appeal to a locally based, and potentially more accessible audience. A continued, and more significant growth in these features of profile and reach would also, however, have impacts on programming that would appeal accordingly, and potentially the level of perceived or real competition for audiences of the type more commonly attracted by other stakeholder organisations in Manchester. But, these differences are, as we observe them between 2013 and 2015 MIF audiences, small.

How are these small changes in audience reach reflected across the event genre of MIF 2015?

Analysis of the 2013 MIF identified that, the events that draw audiences from farthest afield are *Contemporary – Only at MIF*, then *Club Nights* and *Other* events. This position has changed slightly in 2015.

Table A4 shows that *Creative Learning* draws proportionately the greatest share of its audience from furthest afield – but it is worth observing that this is based on a very small number of bookers – there were significantly fewer than 300 creative booker records for analysis. Thereafter, *Contemporary – Only at MIF* remains the greatest draw for people travelling the longest distances – 20% of the audience travel more than an hour to attend. (However, this is a significant reduction from 29% of the audience to *Contemporary – Only at MIF* 2013 events that travelled more than 60-minutes to attend.)

Table A4: Drive-time distribution profile of MIF 2015 audience by genre

Drive-time	Classic		Club Nights		Contemporary - only at MIF		Creative Learning		Other	
	Number	%	Number	%	Number	%	Number	%	Number	%
0-30 minutes	4711	61%	798	72%	7039	63%	161	61%	1013	74%
30-45 minutes	1085	14%	86	8%	1236	11%	25	9%	136	10%
45-60 minutes	465	6%	37	3%	678	6%	10	4%	49	4%
60-90 minutes	527	7%	50	5%	554	5%	10	4%	45	3%
90+	930	12%	131	12%	1616	15%	60	23%	135	10%

Next come *Classic* and *Club Nights* events where 19% and 17% of the audience respectively travel more than an hour to attend. And in fact the proportions of the audience travelling more than 90-minutes to attend these events has grown slightly, by 1% in each case from the level observed in 2013.

The events attracting the greatest proportions of the most local audience in 2013 were *Made in Manchester* and *Creative Learning*. In 2015 there were no *Made in Manchester* events, and the small *Creative Learning* audience has become the most widely geographically distributed. The greatest local draw in 2015 is *Other* events and *Club Nights* (where 74% and 72% respectively of the audience travel less than 30-minues).

It is also interesting to note that the genre which attracts the greatest proportion of the audience from the outer Manchester, 30 to 60-minute drive-time, is *Classic* events, where a growth of 10% in the audience overall was noted, as was also a decrease in the proportions of *Experience Seekers* and *Commuterland Culturebuffs* attending, alongside corresponding increases in the proportions of *Dormitory Dependables* and *Trips & Treats* – which are well represented in those Manchester suburban or "hinterland" areas. These findings all seem consistent in indicating a growth, albeit a relatively small one, amongst the audiences for MIF 2015 events of audience segments with a profile similar in character to that which is more akin to The Lowry's core. Overall, however, the key defining features of the MIF 2015 audience distribution largely matches those observed in 2013. Namely, the engagement of greater proportions of the MIF audience from both the most local people and also those most geographically remote, and drawing fewer audiences proportionally from the villages, towns and cities that lie between 30 and 60-minutes' drive-time from Manchester, than is evident in the audiences for The Lowry or typically by other Manchester organisations.

Are the booking behaviours of audiences for MIF 2015 events any different from 2013?

Table A5 presents a comparison of the average ticket yield and average group sizes from bookings to events at MIF 2015[3] and MIF 2013.

Table A5: Booking bahaviours MIF 2013 and MIF 2015 compared

Programme Strand	Ticket Yield		Group Size	
	2015	2013	2015	2013
Classic	£24.74	£27.69	2.7	2.5
Club Nights	£18.31	£11.09	2.2	2.7
Contemp - only at MIF	£24.95	£26.15	2.3	2.4
Contemp - prodigal		£8.72		2.8
Creative Learning	£6.89	£0.69	2.1	2.9
Made in Manchester		£15.70		3.0
Other	£19.39	£14.10	2.1	3.1

[3] It should be noted that, in 2015 the transaction data for MIF provided by ATG included transactions detailing allocations of tickets and income against MIF key sponsor and partner organisations. These allocations had an inconsistent and disproportionate impact on the analysis of yield and value, so steps were taken to remove such transactions from the elements of this analysis relating to ticket and monetary values, to try and make the comparison with 2013 analysis as consistent as possible.

Average ticket yield

There is a reasonable similarity between the overall results for each year, however, with some notable differences. In both years *Classic* and *Contemporary – Only at MIF* produced the genres with the highest average ticket yields. However, their rank orders are reversed in 2015, compared with 2013. So, in 2013 *Classic* events ranked highest, with an average ticket yield of £27.69. Meanwhile, *Contemporary – Only at MIF,* with the second highest yield in 2013, ranks top in 2015 with an average ticket yield of £24.95. Also notable that ticket yield in both of these two genres fell slightly in 2015. Whereas the average ticket yield in the other three observable genres grew by a more significant level, at the same time as the rank order of *Other*, *Club Nights* and *Creative Learning* remains identical in each year.

Furthermore, analysis of ticket yield in 2013 concluded that for MIF, the programme strands divided into 3 distinct bands in terms of ticket yield: a higher level band containing *Classic* and *Contemporary – Only at MIF*, a middle level band, containing *Made in Manchester*, *Other* and *Club Nights,* and then a much lower level containing *Contemporary Prodigal* and *Creative Learning*. In 2015 the middle and upper of these strands have moved closer together, and could be conceived of as having merged into a single band with average yield ranging between £18.31 and £24.95 (a difference of £6.64, compared with a previous difference in the range between the lowest middle level average yield and the highest top level average yield in 2013 of £16.60).

Group Size

In terms of group size it was observed in 2013 that the most commonly booked number of tickets per transaction was 2, with 64% of booking made being for 2 tickets. This is again true in 2015, with 60% of transactions being for two tickets. It was also observed in 2013 that a significant proportion (19% of all bookings) were for single tickets – reflecting the sorts of highly engaged, knowledgeable arts attending individuals attending alone that form a significant part of the MIF audiences. This feature is again evident in 2015, with 18% of transactions completed for a single ticket booking.

Table A5 does show some variation, albeit very small in the average numbers of tickets purchased per transaction for different genres. The differences, year on year, are smallest in the two most well attended genres, *Classic* and *Contemporary – Only at MIF*. Generally, though, the trend sees smaller average group sizes across all genres in 2015, with the only exception of *Classic* events where there is a small increase, from 2.5 average tickets per booking to 2.7 average tickets per booking.

Frequency and crossover

In 2015 there was a reduction in the number of people who booked to see more than one event, compared with MIF 2013. 19% of bookers in 2015 booked for two events or more, compared with 21% in 2013. Of those who attended more than once, the proportion attending twice was the same as in 2013 (12% of all bookers), whilst the proportions of people booking for three, four or five+ events was slightly smaller in 2015 (7% of all bookers) compared with 2013 (9% of all bookers). But again – these changes are small, and the overall existing pattern from 2013 largely persists in 2015.

In terms of audience cross-over between genres, it was observed in 2013 that the greatest levels of cross-over obtained between *Contemporary – Only at MIF* events and all other genres. The highest level of crossover was observed between *Made in Manchester* events and *Contemporary – Only at MIF* events. The genre that had the lowest level of audience cross-over in common with *Contemporary – Only at MIF* events was *Classic*.

Table A6 shows that, wherever possible, these features are repeated in 2015 MIF audience behaviours. The highest levels of audience crossover are again largely exhibited between all other events and *Contemporary – Only at MIF*. The lowest of these is again between *Classic* events and *Contemporary – Only at MIF*, where only 16% of *Classic* audiences also attended *Contemporary – Only at MIF* events. This compares with 49% of the *Creative Learning* audience that also attended *Contemporary – Only at MIF,* which in the absence of any *Made in Manchester* events in 2015, is the highest level of cross-over between any two genres. The comparatively high levels of cross-over between all genres and *Classic* events is also a feature repeated from 2013, with very similar levels of cross-over being repeated year on year between each of those genre combinations with *Classic* events.

Table A6: MIF 2015 programme strand cross-over

Programme Strand/Programme Strand MIF 2015	Classic	Club Nights	Only at MIF	Creative Learning	Other
Classic		2%	16%	1%	4%
Club Nights	17%		28%	2%	8%
Only at MIF	11%	3%		1%	5%
Creative Learning	26%	7%	49%		16%
Other	21%	6%	41%	3%	

In summary the audience frequency and genre crossover behaviour profiles of MIF 2013 and 2015 are quite consistent, notwithstanding the noted changes in the make up of the various genres in 2015. There is more notable difference in the average ticket yield evident between the two iterations of MIF – this is as likely a result of programme and pricing decisions, as much as of audience led behaviours.

The Lowry, 2013/14 and 2015/16-to-date audiences

One of the recommendations arising from the consultation over the previous phase of audience analysis (presented to stakeholders in July 2015), was that analysis of events that run at The Lowry concurrently with MIF events should be undertaken, so that the impact on audiences at The Lowry and the level of crossover between Lowry and MIF audiences might be better understood. So here analysis of The Lowry's audiences in the 2013/14 financial year (in which events ran concurrently with MIF 2013), and also in the 2015/16 financial year to date[4] (during which some events ran concurrently with MIF 2015) is presented.

The Lowry 2013/14 and 2015-to-date: audience size

There were 120,510 bookers to events taking place at The Lowry between April 2013 and March 2014. Of these, 114,552 were UK residents from whom a valid full UK postcode was recorded upon booking, and could therefore be matched to the *Audience Spectrum* profiling system for analysis. This represents a 16% increase over the size of the audience to events taking place in 2012/13 as previously analysed (in that year there were 103,787 bookers, of whom it was possible to analyse the profile and geographical distribution of 100,621 patrons with valid, full postcodes). [It may be important to note that *War Horse* was presented at The Lowry in this year, and is likely a contributory factor in the growth of audiences in this year.]

In 2015 so far, 87,006 people have booked for events taking place at The Lowry between the start of April 2015 and the end of October. Of these bookers, 82,974 were UK residents that gave a valid full UK postcode upon booking, and could therefore be matched to the *Audience Spectrum* profiling system for analysis.

Has the profile of audiences to The Lowry changed since 2012/13?

The types of people who attend events at The Lowry has remained remarkably consistent across the years: 2012/13, 2013/14 and 2015/16-to-date. The Audience Spectrum profiles, detailed in ***Table A7***, show that whilst the number of people booking for events in 2013/14 grew considerably over the previous year, changes in the overall profile of those audiences were marginal. The greatest change in the representation of

[4] This analysis conducted November 2015, midway through the 2015/16 financial year.

any one Audience Spectrum group in the overall profiles of bookers between the 2012/13 and 2013/14 years is the 0.8% growth in the proportion of Commuterland Culturebuffs, which comes chiefly at the expense of 0.8% and 0.7% reductions in the groups *Experience Seekers* and *Facebook Families* respectively.

The profile of audiences to events overall in the year 2015/16-to-date is once again very similar to the original 2012/13 audience profile, but with one or two slightly more pronounced differences to note. Most notably, there is almost a 3% reduction in the proportion of *Commuterland Culturebuffs* so far in 2015/16 compared with their representation in the 2012/13 audience. This is accompanied by smaller decreases in the proportions of *Experience Seekers* and *Home and Heritage*. The groups which gain audience share over their representation in 2012/13 are: *Facebook Families*, *Trips & Treats* (+2% over 2012/13), *Facebook Families* (+1.3%) and, *Up Our Street* (+0.8%).

This change could be due to a number of factors, including but not exclusive to:

- presenting only a partial picture of events and their audiences at The Lowry in the year
- the profile particularly excludes any bookers to seasonal Christmas events
- impact of programming style of MIF in 2015
- any changes to The Lowry's programming approach in this year

A future full analysis of the whole year's events for 2015/16 could help identify which of these factors are particularly significant.

Table A7: The Lowry 2012/13, 2013/14 and 2015/16 (to date) All bookers Audience Spectrum Profile

The Lowry, 2012/13 Audience Spectrum Profile			
Group Name	% The Lowry 2012/13 bookers	% The Lowry 2013/14 bookers	% The Lowry 2015-to-date bookers
Metroculturals	1.5%	1.5%	1.1%
Commuterland Culturebuffs	23.2%	24.4%	20.4%
Experience Seekers	8.9%	8.1%	8.2%
Dormitory Dependables	22.5%	22.8%	22.6%
Trips & Treats	17.0%	17.1%	19.0%
Home and Heritage	9.5%	9.8%	9.0%
Up Our Street	6.4%	6.3%	7.2%
Facebook Families	7.0%	6.3%	8.3%
Kaleidoscope Creativity	2.1%	1.9%	2.1%
Heydays	1.8%	1.7%	2.1%

In summary, the audience profiles for all events at The Lowry in 2012/13 and 2013/14 are in overall terms exceedingly similar. The 2015 audience to date looks very much like the overall 2012/13 audience profile, with a small number of slightly more pronounced differences, which may or may not align more similarly to the previous years once a full year's data is available to analyse.

Has the profile of audiences for different strands of work at The Lowry changed?

In order to aid comparison with the previous analysis of The Lowry's 2012/13 audience and with the MIF audience (as the blueprint for the programme and audience for The Factory) The Lowry's programme of events for 2013/14 and 2015-to date has again been categorised using the same classification as did the original analysis of 2012/13 audiences. **Table A8**, below shows the proportion of Lowry bookers that attended each genre in each given year. So for example, 12% of all bookers in 2012/13 booked for "classic" events.

There are some significant changes in distribution of the 2013/14 audience across the genres compared with the 2012/13 audience analysis. The key differences are:

- Much greater proportions of The Lowry audience attended events categorised as “Classic” in 2013/14 and 2015-to date, in comparison with the picture in the 2012/13 (62% in both 2013/14 and 2015-to date, compared with just 12% in 2012/13).
- There is an accompanying decrease in the proportions of people booking for “Contemporary Main” in 2013/14 and 2015-to date, compared with 2012/13 (with just 11% of bookers in both 2013/14 and 2015-to date booking “Contemporary Main” events, compared with 51% in 2012/13).
- There are large decreases in 2013/14 ad 2015-to date in the numbers of people booking for events categorised as “other”, compared with the 2012/13 analysis.
- The proportion of the audience that book for “Contemporary New” events remained much more stable between 2012/13 and 2013/14 – between which years there was only a 1% change in the proportions of people booking for “Contemporary New” events. However, there is an increase in 2015-to date, to 7% of bookers (compared with 3% in 2012/13 and 2013/14), for “Contemporary New” events. This is notable even in the context of viewing only a partial year’s dataset in 2015/16, as there are already nearly 2,000 more bookers for “Contemporary New” events in 2015 compared with 2013/14. And whilst in the context of a full year’s programme the percentage share of “Contemporary New” event bookers may flatten out, there will still be a significant percentage increase in the numbers of people attending “Contemporary New” events year-on-year.
- The numbers of people booking for “Made in Manchester” has remained much more consistent, comprising 1% of all bookers in each year under review.
- The audience share of bookers for “Creative Learning” events has fluctuated a little over the three years under analysis, between 3% and 1% - however, this fluctuation is relatively small and the “Creative Learning” strand attracts a comparatively small number of bookers, in comparison with most others (Made in Manchester accepted – which has remained the most stable).

Table A8: The Lowry - audience size by event genre

Category	Description	2012/13 % of all bookers	2013/14 % of all bookers	2015-to date % of all bookers
Classic	Large/ mid-scale work/ artist, known cannon, e.g. Julius Caesar, Die Walkure, BRB's Swan Lake	12%	**62%**	**62%**
Contemporary Main	Theatre, dance, music. E.g. Rambert Dance Company, One Man Two Guvnors, Ukulele Orchestra of Great Britain	51%	**11%**	**11%**
Contemporary New	Premiers, new writing, e.g. Dancing with the Orange Dog, Onions Cry Too, Our Lady of the Goldfinches	3%	4%	**7%**
Made In Manchester	Community-created/ engagement - e.g. Salford Music Festival All Dayer, Docks Law	1%	1%	1%
Creative Learning	Educative, participatory and workshops. e.g. Can Draw Will Draw, Drama zone Gruffalo & Tiger	3%	1%	2%
Other	Catch all	47%	**29%**	**23%**

The most striking differences observed here in the numbers of people booking for "Classic" and "Contemporary Main" events between 2012/13 and subsequent years, may be due in large part to the process of data coding applied between the two respective analyses, rather than to a huge change in the programming strategy between these two years. In the present analysis, the team at The Lowry were able to input into the coding process, (whereas time constraints precluded this in the original study of the 2012/13) and therefore the analysis of the programme distribution in the 2013/14 and 2015-to date years may more be likely to reflect the organisation's own programming context and aims.

Notable consequences for some of the conclusions drawn from the analysis of the changes in proportions of audiences for various genres detailed above are:

- It was previously observed that the genres with by far the greatest proportions of bookers at both The Lowry's events in 2012/13 and MIF 2013 were within the "Contemporary" classifications. Almost 60% of MIF bookers had booked for "Contemporary – Only at MIF/The Factory" events, and over 50% of The Lowry's bookers had booked for "Contemporary Main". This led to the observation that there might likely be significant shared interest in these audiences for "Contemporary" style events. However, from the analysis of The Lowry's 2013/14 and 2015-to date audience data it is clear that the overall proportions of audiences for "Contemporary" style events is quite different, making up a much more significant share of the MIF programme and audience in comparison with The Lowry's.
- At the same time, however, The Lowry has experienced a significant increase in the numbers of people attending its own "Contemporary New" events in 2015, compared with previous years. This is the programme strand most closely aligned to the programme strands that form the core of MIF's programming activity and audience. The growth of audiences for *Contemporary New* events at The Lowry at the same time that audiences for *Contemporary* events at MIF in 2015 has actually decreased slightly as a proportion of the overall audience is noteworthy. This remains a comparatively small percentage of the audience for The Lowry, and the major audience for MIF events. But The Lowry's growth in this area, and the increase in the % of the MIF audience attending *Classic* events at MIF 2015, indicate small shifts by both organisations towards each other's respective core programme audiences – which possibly represents developing potential for collaboration/competition.

Whist we've seen that the proportions of people attending the events of different genres has changed in the analysis of The Lowry's audiences for 2013/14 and 2015-to-date, has the audience profile of the audiences for those genres changed as well?

Table A9: Audience Spectrum profiles by event genre for The Lowry events 2012/13 and 2013/14 compared

The Lowry 2013-14	Classic			Contemporary - Main			Contemporary - New			Creative Learning			Made in Manchester			Other		
Group Name	1314 %	1213 %	Diff.	1314 %	1213 %	Diff.	1314 %	1213 %	Diff.	1314 %	1213 %	Diff.	1314 %	1213 %	Diff.	1314 %	1213 %	Diff.
Metroculturals	1.5%	2.3%	-0.8%	2.0%	1.6%	0.4%	2.9%	3.3%	-0.4%	1.9%	1.2%	0.7%	1.1%	0.9%	0.2%	1.5%	1.2%	0.3%
Commuterland Culturebuffs	27.3%	29.4%	-2.1%	21.6%	25.3%	-3.7%	16.8%	18.4%	-1.6%	22.1%	19.6%	2.5%	15.5%	8.6%	6.9%	20.7%	20.1%	0.6%
Experience Seekers	6.8%	11.3%	-4.5%	8.9%	8.4%	0.5%	16.5%	16.5%	0.0%	11.6%	7.7%	3.9%	4.9%	3.7%	1.2%	10.4%	8.6%	1.8%
Dormitory Dependables	23.3%	20.8%	2.5%	21.8%	22.7%	-0.9%	19.0%	17.1%	1.9%	21.3%	22.4%	-1.1%	22.7%	20.1%	2.6%	22.2%	22.8%	-0.6%
Trips & Treats	16.0%	12.6%	3.4%	17.7%	16.0%	1.7%	16.0%	15.0%	1.0%	16.0%	18.4%	-2.4%	20.1%	18.0%	2.1%	18.3%	19.0%	-0.7%
Home & Heritage	11.0%	9.8%	1.2%	7.9%	10.3%	-2.4%	7.1%	7.8%	-0.7%	7.5%	7.3%	0.2%	7.1%	8.3%	-1.2%	8.4%	9.0%	-0.6%
Up Our Street	5.9%	5.7%	0.2%	6.7%	6.3%	0.4%	7.6%	7.4%	0.2%	6.0%	6.4%	-0.4%	6.8%	9.5%	-2.7%	7.1%	6.9%	0.2%
Facebook Families	5.1%	4.8%	0.3%	8.5%	5.9%	2.6%	8.7%	8.7%	0.0%	7.3%	11.2%	-3.9%	15.4%	23.5%	-8.1%	7.4%	8.1%	-0.7%
Kaleidoscope Creativity	1.6%	2.2%	-0.6%	2.8%	1.9%	0.9%	3.4%	3.6%	-0.2%	3.5%	2.8%	0.7%	3.1%	1.8%	1.3%	2.2%	2.1%	0.1%
Heydays	1.6%	1.3%	0.3%	2.0%	1.7%	0.3%	2.0%	2.1%	-0.1%	2.8%	2.9%	-0.1%	3.3%	5.6%	-2.3%	1.9%	2.1%	-0.2%

Table A9 compares the *Audience Spectrum* profiles for audiences to the various different genre categories for 2013/14 alongside the profiles for the events in the same genre in 2012/13, highlighting the differences between them.

Table A10 works in the same way, except that it compares the *Audience Spectrum* profiles for audiences to the various different genre categories for 2015 to-date alongside the profiles for the events in the same genre in 2012/13, again highlighting the differences between them, on the basis that we are trying to establish whether The Lowry's audiences have changed over time in such a way as to affect any of the conclusions drawn from the earlier phases of this market feasibility analyses.

Table A10: Audience Spectrum profiles by event genre for The Lowry events 2012/13 and 2015 to-date compared

The Lowry 2015-16	Classic			Contemporary - Main			Contemporary - New			Creative Learning			Made in Manchester			Other		
Group Name	2015 %	1213 %	% Diff.	2015 %	1213 %	% Diff.	2015 %	1213 %	% Diff.	2015 %	1213 %	% Diff.	2015 %	1213 %	% Diff.	2015 %	1213 %	% Diff.
Metroculturals	0.9%	2.3%	-1.4%	1.4%	1.6%	-0.2%	2.3%	3.3%	-1.0%	1.3%	1.2%	0.1%	0.7%	0.9%	-0.2%	1.3%	1.2%	0.1%
Commuterland Culturebuffs	20.0%	29.4%	-9.4%	21.4%	25.3%	-3.9%	24.8%	18.4%	6.4%	19.4%	19.6%	-0.2%	14.6%	8.6%	6.0%	20.9%	20.1%	0.8%
Experience Seekers	7.3%	11.3%	-4.0%	8.8%	8.4%	0.4%	13.3%	16.5%	-3.2%	11.3%	7.7%	3.6%	5.7%	3.7%	2.0%	9.5%	8.6%	0.9%
Dormitory Dependables	22.7%	20.8%	1.9%	23.4%	22.7%	0.7%	20.4%	17.1%	3.3%	23.6%	22.4%	1.2%	17.8%	20.1%	-2.3%	22.4%	22.8%	-0.4%
Trips & Treats	19.5%	12.6%	6.9%	18.4%	16.0%	2.4%	15.1%	15.0%	0.1%	16.9%	18.4%	-1.5%	17.2%	18.0%	-0.8%	18.1%	19.0%	-0.9%
Home & Heritage	9.7%	9.8%	-0.1%	7.4%	10.3%	-2.9%	7.9%	7.8%	0.1%	7.7%	7.3%	0.4%	7.7%	8.3%	-0.6%	8.7%	9.0%	-0.3%
Up Our Street	7.4%	5.7%	1.7%	6.3%	6.3%	0.0%	6.6%	7.4%	-0.8%	6.8%	6.4%	0.4%	9.7%	9.5%	0.2%	7.2%	6.9%	0.3%
Facebook Families	8.3%	4.8%	3.5%	8.4%	5.9%	2.5%	6.0%	8.7%	-2.7%	8.3%	11.2%	-2.9%	18.8%	23.5%	-4.7%	7.8%	8.1%	-0.3%
Kaleidoscope Creativity	1.9%	2.2%	-0.3%	2.6%	1.9%	0.7%	2.5%	3.6%	-1.1%	3.1%	2.8%	0.3%	3.2%	1.8%	1.4%	2.3%	2.1%	0.2%
Heydays	2.2%	1.3%	0.9%	2.0%	1.7%	0.3%	1.2%	2.1%	-0.9%	1.7%	2.9%	-1.2%	4.5%	5.6%	-1.1%	1.9%	2.1%	-0.2%

Compared to the close similarity observed between the overall profiles of all bookers to events at The Lowry in 2012/13 and those events in 2012/13 and 2015 to-date, **Table A9** and **Table A10** show there are some slightly more pronounced changes between the audience profiles for events across the different genres. The greatest difference in profile is observed in the year on year profiles for *Classic* events, where for example there were 9.4% fewer *Commuterland Culturebuffs* in 2015 to-date compared to 2012/13, and 6.9% more *Trips & Treats*. The key features of the profile comparisons for each genre across the three years, presented in these two tables are:

- ***Classic*** – this genre has seen the biggest change in the overall size of the audience, and there are accompanying changes reflected in the *Audience Spectrum* profile of audiences for *Classic* events. 2013/14 saw a growth in the proportions of the audience made up by *Trips & Treats* (+3.4% more in 2013/14 than 2012/13), *Dormitory Dependables* (+2.5%) and *Home & Heritage* (1.2%). The proportion of *Trips & Treats* grew even more in 2015 to-date (+6.9% more in 2015 to-date than in 2012/13). It's also noteworthy that in 2015 to-date that the:

- proportion of the typically lesser-engaged groups *Facebook Families* and *Up Our Street*. The increases come in each year at the expense of the portion of the audience made up by the two higher engaged groups, *Commuterland Culturebuffs* and *Experience Seekers*. In 2015 to-date the proportion of the audience for *Classic* events made up of *Commuterland Culturebuffs* is nearly 10% points lower than it was in 2012/13. The changes in the *Classic* audience profile can be broadly summarised as a growth in the proportion of the middling-, and to some extent, the lesser-engaged *Audience Spectrum* groups, accompanied by a decrease in the proportion of each of the higher engaged groups.
- ***Contemporary Main*** - where large decreases in the number of people attending are observed since 2012/13, sees a less pronounced but more consistent change, again with proportionately fewer *Commuterland Culturebuffs* appearing (-3.7% points less in 2013/14 than there were in 2012/13, and -3.9% points fewer in 2015 to-date compared with 2012/13). There are also fewer *Home & Heritage* (-2.4% in 1314, and -2.9% in 2015 to-date). The greatest growth in the audience share for *Contemporary – Main* events is seen in *Facebook Families*, (+2.6% in 2013/14 and +2.5% in 2015 to-date) and then next amongst *Trips & Treats* (-1.7% fewer in 2013/14, and -2.4% fewer in 2015 to date).
- ***Contemporary – New -*** the changes witnessed in the profile of the audience for Contemporary New events are inconsistent across the years under analysis. 2013/14 sees a small reduction in the proportion of *Commuterland Culturebuffs* attending, yet in 2015 to-date there is actually a more significant increase in the proportion of *Contemporary – New* attenders that are *Commuterland Culturebuffs* (in which year they make up +6.4% points more of the audience than in 2012/13). 2013/14 sees a small increase (+1.9% points) in the proportions of Dormitory Dependables, which grows by +3.3% points in 2015 to-date. The groups in which the compensating decreases occur in 2015 to-date are Experience Seekers and Facebook Families. There seems to be a slightly less fixed audience profile for *Contemporary – New* events across the three years under analysis, and perhaps this is reflective of the actual increase in the numbers of people attending these such events at The Lowry in 2015?
- ***Creative Learning*** – the audience for *Creative Learning* events is the second smallest amongst the genre classification for The Lowry. The consistent feature observed in the *Creative Learning* audience profile sees increases in both 2013/14 and 2015 to-date of the proportions of *Experience Seekers* over their representation in the *Creative Learning* event audience in 2012/13, which was just 7.7%. There is a commensurate decrease in *Facebook Families* of -3.9% points in 2013/14 and -2.9% points in 2015 to-date compared with the 2012/13 profile. *Trips*

& Treats also has decreased in each year, but of slightly smaller scale to that observed for *Facebook Families*. Some of the other groups fluctuate to small degrees over the two subsequent years.

- ***Made in Manchester*** - is the genre with the smallest audience across The Lowry's programme. There are some relatively significant proportional changes between some of the various Audience Spectrum groups' representations in the audience profiles across the years under analysis - but these actually account for comparatively very small numbers of bookers. The key consistent features of those changes are that, there were significant proportional increases in the representation of *Commuterland Culturebuffs* in both 2013/14 (+6.9% points) and 2015 to-date (+6.0% points) compared to 2012/13. There was also a consistent, but smaller increase in *Experience Seekers* in both these subsequent years. The groups that consistently decreased audience share in return were *Facebook Families*, where the representation was 8.1% points less in 2013/14 and 4.7% points less in 2015 to-date.
- ***Other events*** - Profile of audiences to the "catch-all" genre, *Other* is the most stable across the three years under review. There is only a single instance of a change in the representations of any group amounting to more than a single percentage point year on year. This occurs in the 2013/14 profile where the proportion of attenders to *Other* events made up by Experience Seekers is 1.8% points greater than it was in 2012/13. Otherwise all changes in the representation of all *Audience Spectrum* groups in the audience profile of *Other* events across the years 2012/13, 2013/14 and 2015 to-date are of less than 1%.

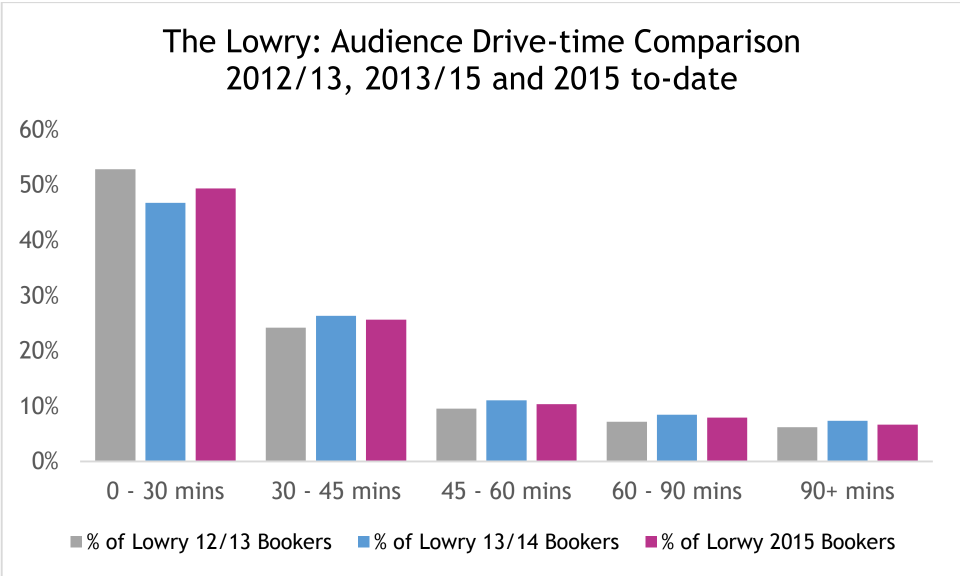
Has audience reach changed for The Lowry's events 2013/14 and/or 2015 to-date?

The analysis of The Lowry's 2012/13 audience distribution identified that The Lowry drew a smaller proportion of its audience from within the most immediate 0-30-minutes' drive-time area than was the case for MIF 2013. The Lowry then drew a much greater proportion of its audience from the doughnut shaped area that is defined between 30- and 60-minutes drive-time from Central Manchester. Over a third of all bookers to events at The Lowry in 2012/13, come from this area which includes much of the "hinterland" between Manchester and Liverpool, compared with just 16% of the MIF 2013 audience.

Graph A2 shows that a largely similar geographical distribution of The Lowry's audience prevails in 2013/14 and 2015 to-date. However, what small changes there are evidenced serve to slightly emphasize the key characteristics that distinguish The Lowry audience's geographical distribution from MIF's. Namely, that the proportion of The Lowry audience drawn from the closest areas within 30-minutes' drive-time decreased slightly, from 53%

in 2012/13 to 49% in 2015 to-date (via a nadir of 47% in 2013/14), whilst the audience drawn from the middling 30 to 60-minute drive-time area grew slightly bigger, from 33% in 2012/13 to around 37% in both 2013/14 and 2015 to-date. It's also noteworthy that the proportion of The Lowry's audience drawn from the most remote, 60 to 90 minutes, and 90-minutes+ drive-time also increased slightly from 13% in 2012/13 to 15% in both 2013/14 and 2015 to-date. Broadly speaking, however, **Graph A2** depicts a relatively stable distribution across the years.

Graph A2: The Lowry – audience drive-time comparison



How are these small changes in audience reach reflected across the event genres of The Lowry 2013/14 and 2015 to-date?

Analysis of the distances travelled by audiences to events of different genres at The Lowry in 2012/13 revealed some significant differences between the programme strands. For example, the genre which drew the greatest proportion of its audience from the most local areas was *Made in Manchester*, to which 86% of the audience travelled 30 minutes or less. In contrast *Contemporary – Main* and *Classic* events in 2012/13 drew just 49% and 50% respectively of their audiences from within the same 30-minute drive-time area.

The genre which drew the greatest proportion of the audience from the furthest afield was *Contemporary – New*, to which 19% of the audience had travelled from farther than 90-minutes' drive-time. *Creative Learning* drew the next largest share of its audiences from the greatest reaches, followed by *Contemporary – Main* and *Classic* then classic events.

In 2013/14 and 2015 to-date it's the case again that some of those key features are repeated, but in slightly changed proportions. **Table A11** shows that *Classic* events again draw the smallest proportion of the audience from the most local area, with 44% of the *Classic* audience in 2013/14, and 48% of the *Classic* audience in 2015 to-date being drawn from within 30-minutes' drive-time. Again, repeating the pattern from 2012/13, the *Made in Manchester* audience is the most local in The Lowry's programme with almost 80% in 2013/14, and slightly fewer - around three-quarters – in 2015 to-date, coming from within 30-minutes drive-time.

The programme strand drawing the greatest proportion of the audience from farthest afield in 2013/14 and 2015 to-date is no longer *Contemporary – New*. We have seen that audiences for this genre have grown over the years presently under analysis, but it seems that that growth has come mainly from amongst the most local audiences, with almost 65% in 2013/14 and almost 60% in 2015 to-date, coming from the most local areas. The genres drawing the greatest audiences from furthest afield in 2013/14 and 2015 to-date are *Classic* and *Other* events, both of which draw between 15% and 16% of their audiences from more than 60-minutes' drive-time in both years.

Table A11: Drive-time distribution profile of The Lowry 2013/14 and 2015/16 to-date audience by genre

Drive-time	Classic		Contemporary - Main		Contemporary - New		Creative Learning		Made in Manchester		Other	
	2013/14 %	2015/16 %	2013/14 %	2015/16 %	2013/14 %	2015/16 %	2013/14 %	2015/16 %	2013/14 %	2015/16 %	2013/14 %	2015/16 %
0 - 30 minutes	44%	48%	59%	61%	64%	59%	68%	69%	78%	75%	50%	50%
30 - 45 minutes	28%	27%	24%	24%	19%	22%	18%	20%	13%	12%	25%	24%
45 - 60 minutes	12%	11%	8%	8%	7%	8%	6%	4%	4%	5%	10%	10%
60 - 90 minutes	9%	8%	5%	4%	4%	6%	4%	4%	3%	6%	8%	8%
90+ minutes	7%	7%	4%	4%	6%	5%	4%	3%	2%	2%	7%	8%

Are the booking behaviours of audiences for The Lowry's 2013/14 or 2015 events to date any different from 2013?

Table A12 presents a comparison of the average ticket yields and group size from bookings to events at The Lowry during 2012/13, 2013/14 and in 2015 to-date. Once again the results in the table reflect consistency of many key features across the three years, however there are significant fluctuations in the actual results. [It should be noted that, the ticketing data supplied in 2013/14 and 2015 to-date includes what appears to be agency sales through, for example, Ticketmaster and SeeTickets, which have been loaded through the system in bulk transactions. The high value of these transactions may account for the scale of difference in the actual figures returned, particularly for group size. It is beyond the scope of the present study to re-examine the raw data originally supplied for 2012/13 to check whether the same agency sales were included in the dataset. This could however be re-examined, if there is a requirement to determine these behavioural results most accurately.]

Average Ticket Yield

Classic events have consistently been amongst those commanding the highest ticket yield. In 2012/13 *Classic* events had the second highest ticket yield of £24.17. Only, *Contemporary – Main* had a higher yield of £24.72. In both 2013/14 and 2015 to-date *Classic* events have the highest overall yield by a much greater margin in both years. Yield is then next highest for *Other* events in these years.

Made in Manchester events have consistently produced the lowest ticket yield, followed by *Creative Learning* events.

The *Contemporary* genres have remained in the middle in terms of ticket yield, however it is worth noting that the value of *Contemporary – Main* events has significantly fallen year on year, while there has been a corresponding year on year rise in the average ticket yield for *Contemporary – New* events of similar proportion.

Table A12: Booking behaviours The Lowry 2012/13, 2013/14 and 2015/16 to date compared

Programme Strand	Ticket Yield			Group Size		
	The Lowry 2012/13	The Lowry 2013/14	The Lowry 2015	The Lowry 2012/13	The Lowry 2013/14	The Lowry 2015
Classic	£24.17	£36.91	£39.60	2.6	3.1	3.5
Contemporary - Main	£24.72	£17.30	£14.64	2.9	5.0	3.6
Contemporary - New	£8.11	£17.01	£18.66	2.4	2.3	2.7
Creative Learning	£5.62	£10.61	£10.11	3.9	4.3	4.2
Made in Manchester	£3.49	£5.87	£4.09	3.6	3.7	5.8
Other	£20.58	£21.38	£23.76	3.3	7.1	6.8

Group Size

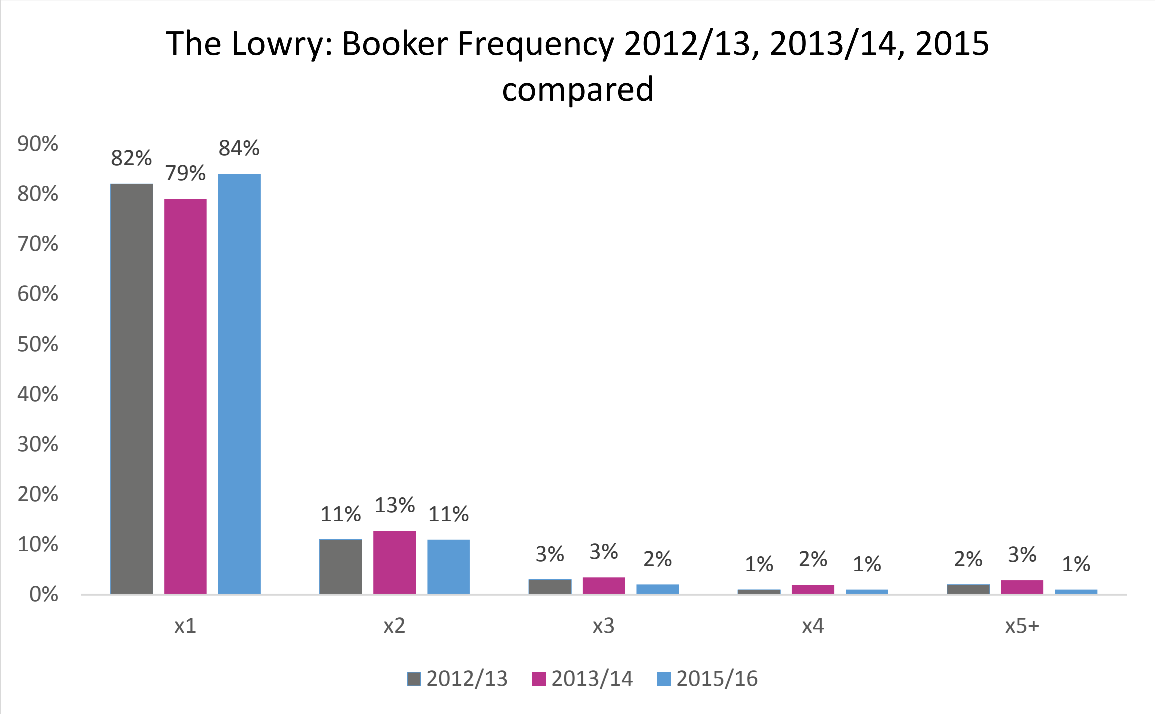
It should be noted that the actual results for "Group size" analysis are likely to be those that are most affected by the inclusion of agency sales transactions in 2013/14 and 2015 to-date. The analysis suggest that there is consistency over time in the fact that people are likely to attend *Contemporary - New* events in the smallest groups. There has been more fluctuation over the genres attracting the largest groups. In 2012/13 it was *Creative Learning* events, and whilst they still rank highly in subsequent years, it was *Contemporary – Main* events in 2013/14 and *Other* events in 2015 to-date, that commanded the highest average ticket yield.

Frequency

Graph A3 shows only a very small degree of change over the years 2013/14 and 2015 to-date in the frequency with which audiences attend events at The Lowry. In 2012/13 82% of the audience attended only one event that year. This level fell slightly in 2013/14, when 79% of bookers booked only for a single show, and in which year there were corresponding small rises in the proportion of people that booked for 2, 4 and 5+ events. In 2015, there is a higher proportion of once only bookers, at 84% even higher than was seen in 2012/13 – however, the analysis of this years' frequency of attendance is undoubtedly influenced by only looking at a partial years' data.

Overall, it's clear that the frequency of attending pattern remains remarkably stable across the three years. And that the level of in-year repeat attendance remains lower than that exhibited by the MIF audience, even though the MIF audience has only the month of July within which to repeat attend festival events. Suggesting a specific festival attending behavioural characteristic or mind-set, alongside the particular audience profile features that have been noted are particular to MIF.

Graph A3: The Lowry 2012/13, 2013/14 & 2015/16 to-date booker frequency



Genre Cross-over

Analysis of the 2012/13 events at The Lowry showed that the greatest levels of audience cross-over between the different genres occurred between, *Contemporary – Main* events, and all other genres, especially *Classic* and *Contemporary – New*. To some degree, this is a reflection of the size of the datasets in question: there were more events and more bookers for *Contemporary – Main* events, and therefore there's greater opportunity and likelihood that those are the events that bookers to other genres can/will attend.

As the scale of events and genres altered in 2013/14 and 2015 to-date such that *Classic* events becomes the largest genre, in terms of number of production and audience size, it corresponds that the greatest levels of cross-over occurred between *Classic* events and all others, but most notably with *Contemporary – New*, *Creative Learning* and *Contemporary – Main* events. It should also be noted that the levels of cross-over observed in 2015 are generally speaking lower, but are to be expected, again for the reason that only an incomplete years' data is being analysed. Otherwise, significant levels of cross-over are also observed between, *Contemporary – New* and *Contemporary – Main* events, and also between *Contemporary – New* and *Other* events. The pattern is exceedingly consistent across both 2013/14 and 2015 to-date (the preceding note on differences of scale resulting from the incomplete 2015/16 year's data, notwithstanding), and is also very similar to that observed in the 2012/13 audience analysis (again, notwithstanding the note about the impacts resulting from changes in the relative size of the *Classic* and *Contemporary – Main* genres).

Table A13: The Lowry 2013/14 programme strand cross-over

Programme Strand/Programme Strand The Lowry 2013-14	Classic	Contemporary - Main	Contemporary - New	Creative Learning	Made in Manchester	Other
Classic		4%	2%	1%	0%	7%
Contemporary - Main	23%		4%	2%	1%	11%
Contemporary - New	31%	14%		2%	2%	18%
Creative Learning	27%	14%	4%		5%	12%
Made in Manchester	12%	7%	6%	5%		8%
Other	15%	4%	2%	1%	0%	

Table A14: The Lowry 2015/16 to-date programme strand cross-over

Programme Strand/Programme Strand The Lowry 2015-16	Classic	Contemporary - Main	Contemporary - New	Creative Learning	Made in Manchester	Other
Classic		2%	2%	0%	0%	4%
Contemporary - Main	14%		7%	2%	0%	7%
Contemporary - New	24%	11%		1%	1%	12%
Creative Learning	12%	13%	6%		1%	6%
Made in Manchester	8%	4%	4%	1%		6%
Other	12%	3%	3%	0%	0%	

How many of The Lowry's audience also attended events at MIF 2013 and MIF 2015

In 2013/14, there were 3,909[5] bookers to events at The Lowry who also booked tickets for events at MIF 2013. This represents 3.4% of all bookers to The Lowry in that year.

In 2015 to date, 2,619 bookers to events at The Lowry had also booked tickets to events at MIF 2015. This represents 3.2% of all bookers to The Lowry in the year to date.

[5] The Lowry/MIF cross-over levels are established based on matching customer records where the postcode and patron's last name are both the same.