2016

Future Arts Provision in Lancaster

Appendix A

Cinema & live performance in Lancaster

An analysis of audience reach & potential

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Executive Summary

- This report sets out an analysis of the potential demand for enhanced cinema and live performance provision in Lancaster. It draws on a range of data sources to identify the catchment areas for each and potential demand from these. It also includes a brief analysis of existing and potential audience profiles to gain insight about available audience engagement and development opportunities.

- In comparing the findings from the 2013 NEMS Household Survey and locally held box office data relating to existing film and cinema attenders, we have been able to identify potential catchment areas for a range of artforms. They include cinema, for which audiences are likely to travel shorter distances (up to 30 minutes drivetime); a number of performance based artforms, for which there are clear differences in the catchment areas (between 30 minutes and over an hour's drivetime); and, participatory activities for which we can expect participants to travel some distance.

- The analysis of demand and market share within these catchment areas suggests that whilst the markets for cinema and seasonal shows are reasonably well serviced currently, there should be opportunities to engage more audiences with other live performance events, including music, plays & drama, dance and children & family shows.

- The findings also suggest that should also be opportunity to engage more participants in participatory activities such as theatre and dance, for which the analysis has been limited to children and young people.

- A review of the areas of influence of venues within the region providing similar programmes demonstrates the future impact of the Blackpool Grand across all theatre markets: particularly on the available share of the children and family market. The same analysis highlights potential opportunities to supplement, enhance or work in collaboration with the Bolton Octagon's programming associated with dance, children and family shows and participatory activities.

- The analysis of audience profiles suggests that there are two main target groups for each of cinema and theatre provision in the catchment areas: one that has mainstream preferences, is risk averse and likely to attend on an infrequent basis, to which popular films and shows will appeal; and, one that is more discerning, risk taking and willing to travel and pay for film and theatre that is unique of different to that available elsewhere.

- Finally, and although there are clear opportunities to extend and expand patronage amongst these two main market groups, there are no obvious targets for audience development activity. Of the most under-represented groups amongst audiences currently, two make up the most viable market, albeit that the investment required to engage them may outweigh any potential income gains at least in the short term. Nevertheless, there are hotspots where these potential audiences are prevalent close to Lancaster in which audience development activities could be trialed.

Contents

1 Introduction

This note sets out an analysis of potential demand for a new 450 cinema and live performance venue in Lancaster. It draws on a range of data sources including existing audience data for The Dukes Theatre, area profile data and the WYG Commercial Leisure Study from which NEMS household survey data has been extracted. It sets out an analysis of the catchment areas for cinema, live performance and participatory activities and an assessment of the market potential based on what we already know about the population in these catchment areas and competition from elsewhere. Finally, we draw on the Audience Spectrum profiling framework to provide insights about the patterns of demand within the catchment areas and audience engagement and development opportunities.

2 Defining a catchment area

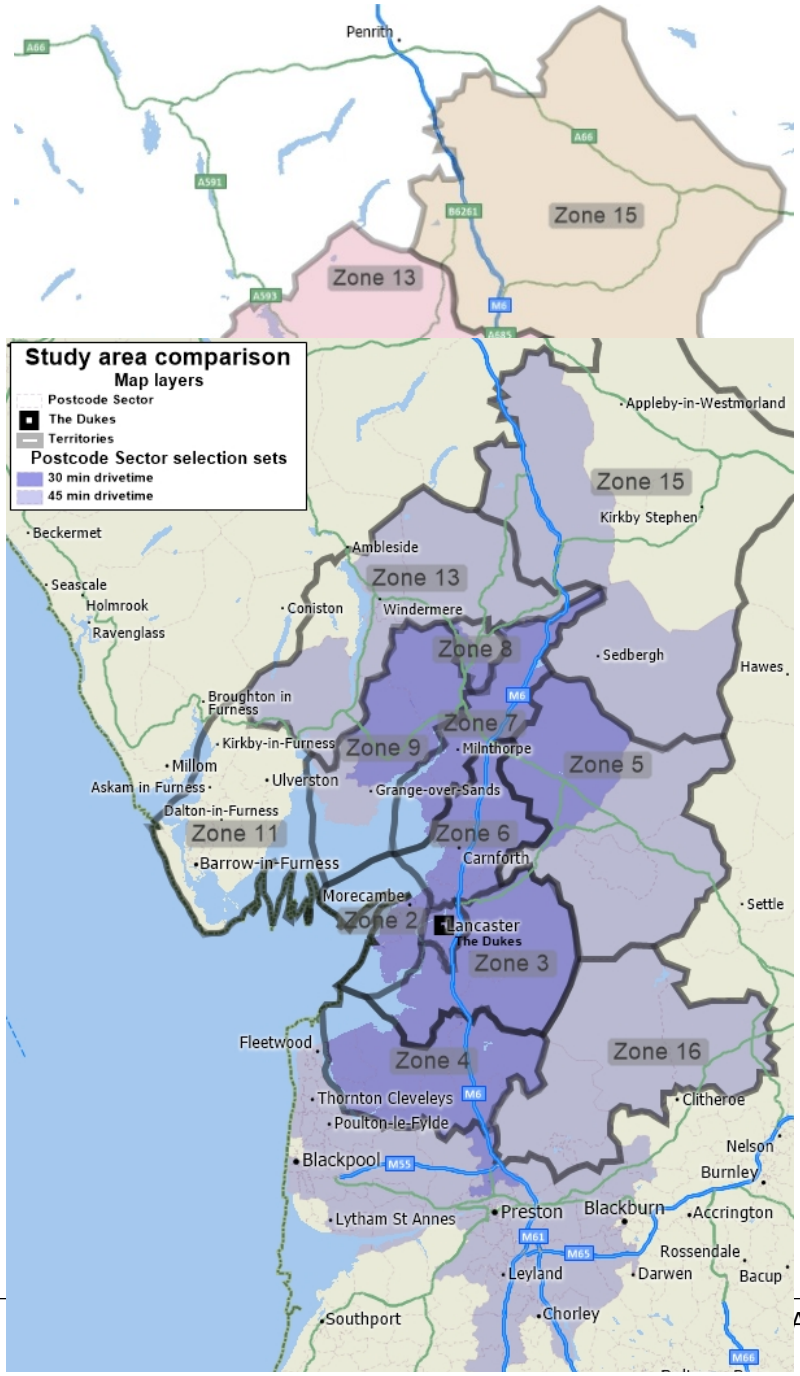
There are a number of sources of evidence that help us to identify the reach of a potential new 450 seat venue for cinema and live performance in the City as follows.

2.1 NEMS Household Survey, 2013

- The LCC Commercial Leisure Study conducted by WYG draws on the household survey undertaken by phone with 1,700 respondents in June 2013. The study area comprised of 13 Zones based on postcode sector groups that are likely to exhibit similar patterns of leisure trips, illustrated on the map aside.
- Respondents were asked whether they had attended cinemas, theatres/concert halls and/or museums & galleries and where they had last attended these.

Cinema attenders

- The results suggested that almost half of residents within the study area go to the cinema and that the venues in the Lancaster area (The Vue, Reel and the Dukes) secure 42% of the study area market share.
- These Lancaster venues attract greatest proportion of the market share in Zones 1 to 7 across which they account for 82% of the market share (59% for the Vue, 16% for the Reel and 7% for the Dukes).
- These results suggest that the catchment area for cinema provision in Lancaster is likely to be confined to zones 1 to 7 where



competition from other venues is low (accounting for less than 20% of market share) and outside which, the maximum share of any one of the venues is 6.2% (The Vue in zone 9).

- The map aside shows how the study area zones map against the 30 and 45 minute drivetimes of the city and indicates that the catchment area covering zones 1 to 7 is within a 30 minute drivetime of the site.

Live performance attenders

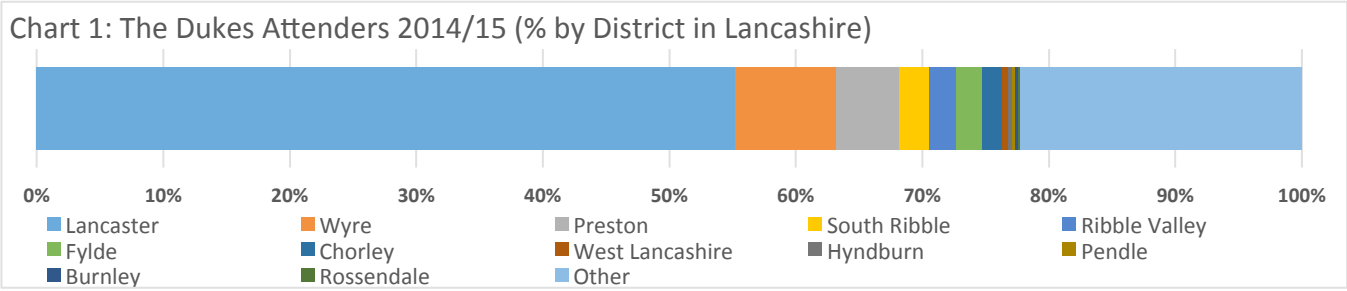
- Across the study area, 41% of respondents to the research indicated that they visit the theatre/concert halls. Of this market, Lancaster currently secures a share of 21.7% and Morecambe town centre attracts a further share of 1.5%.
- Notably, over half of the market originating from the study area goes to locations outside the study area, indicating a willingness to travel to events and/or lack of local provision.
- Just under half (49%) of trips made by residents within the Lancaster zones (1,2,3 &6) are made within the area reflecting the level of competition from venues outside the study area and particularly from Manchester which secures almost a quarter of the Lancaster area theatre going market. Other popular destinations for arts and cultural trips from residents in the Lancaster zones are London (11%), Liverpool (3%) & Preston (2%). Whether this will change with enhanced or expanded local provision is not clear.
- As with cinema, there appears to be considerable variation in Lancaster's share of the theatre going market across the study area zones (varying from 0% to 54%) and which is minimal (1.5% or less) in zones 9, 11, 13, 15 & 16. Again, and on the basis of these findings, the existing catchment area for theatre within the study area is likely to be confined to zones within or close to a 30 minute drivetime of the site.

2.2 The Dukes Attendance data

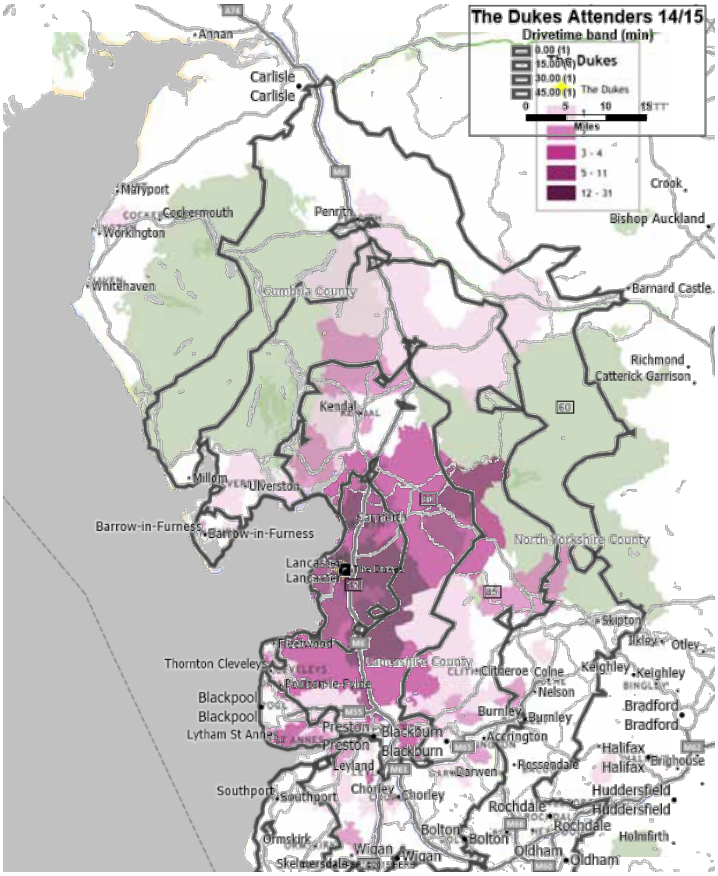
There are a number of sources of evidence from the theatre including the results of past attender mapping studies and box office data for 2015/16 which has been extracted from the venue's audience finder account.

All attenders

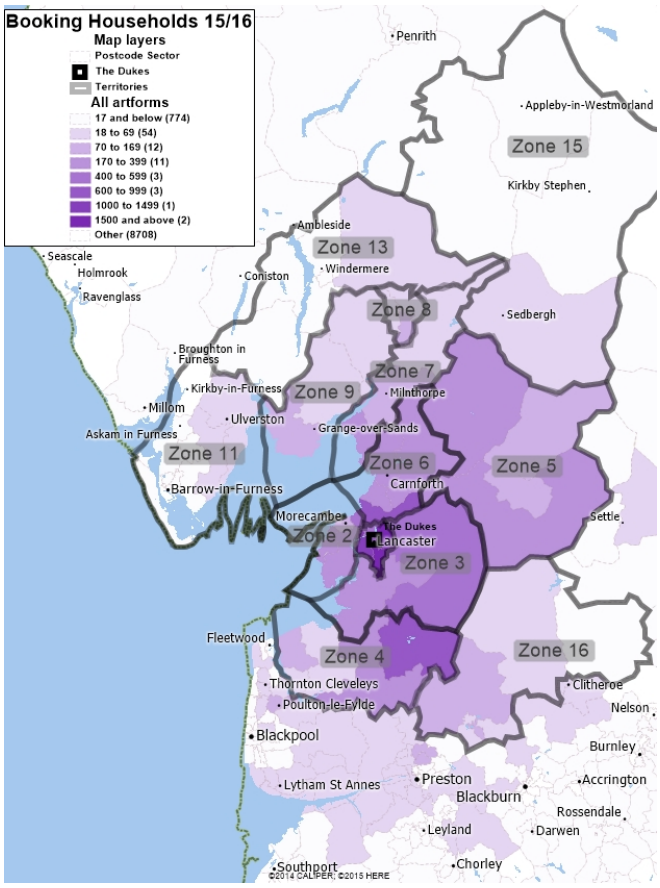
- The local authority breakdown of attenders during 2014/15 (illustrated below) indicates that 78% of existing attenders reside within Lancashire county and over half (55%) reside within the Lancaster LA area (covered by the previous zones 1,2 3&6).

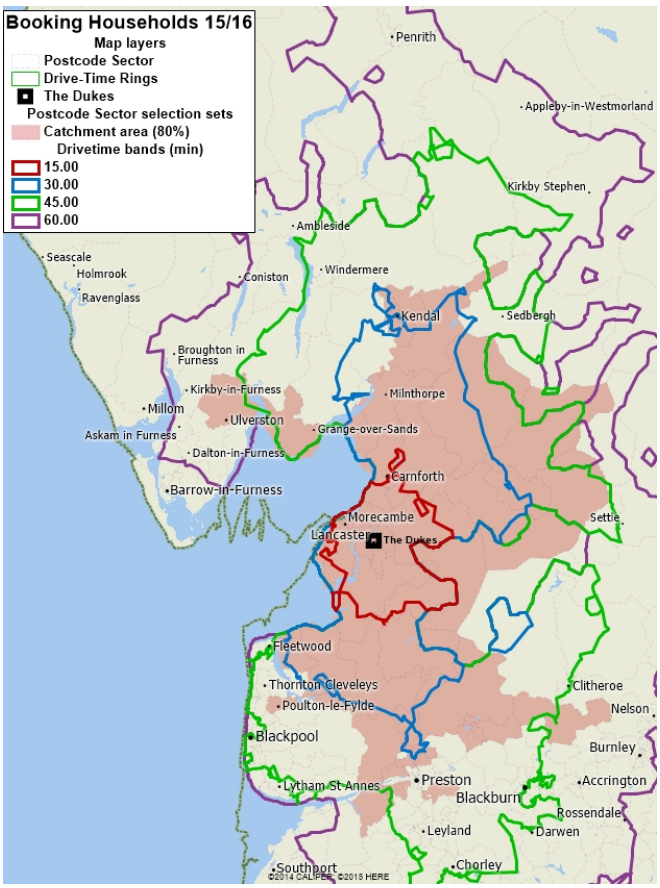


- The audience agency mapping study (based on 2013/14 attender data) indicated that the catchment area for the Dukes was 60 minutes. A more recent study (based on 2014/15 Audience Finder survey respondents) also indicated that the catchment area (defined by where 80% of our audiences live) was 60 minute drivetime around the venue.
- This more recent study drew on a relatively small sample of audience postcodes. Notwithstanding, this, if we overlay the audience density map produced with 15 minute drivetime bands (shown on the map aside), it is clear that the main audience concentrations (12 respondents +) are all within 45 minutes of the venue with most within 30 minutes drivetime.
- The 2014/15 survey top line findings (sample 156) further suggest that the majority of audiences are repeat audiences seeking to be entertained and whose patronage is shared with The Brewery (33% in last 12 months), Grand Theatre Lancaster (40%) & Platform (22%). Just 1% of audiences share their patronage with Ludus Dance and 9% with the Nuffield theatre.



- To further explore the catchment area for theatre performances, the map below left draws on a separate analysis of all (15,662) booking household postcodes for 2015/16 (extracted by postal sector from the Audience Finder box office database) and confirms key concentrations around Lancaster (zones 1,2,3 & 6). It also shows that audiences attend in relatively high numbers from the areas covered by zones 4, 5, 7, 8 & 9.
- Although the analysis confirms that few attenders reside in the areas covered by zones 15 and 13 to the north of the study area, it indicates that some audiences attend from beyond the study area to the south around Preston and Poulton-le-Fylde.

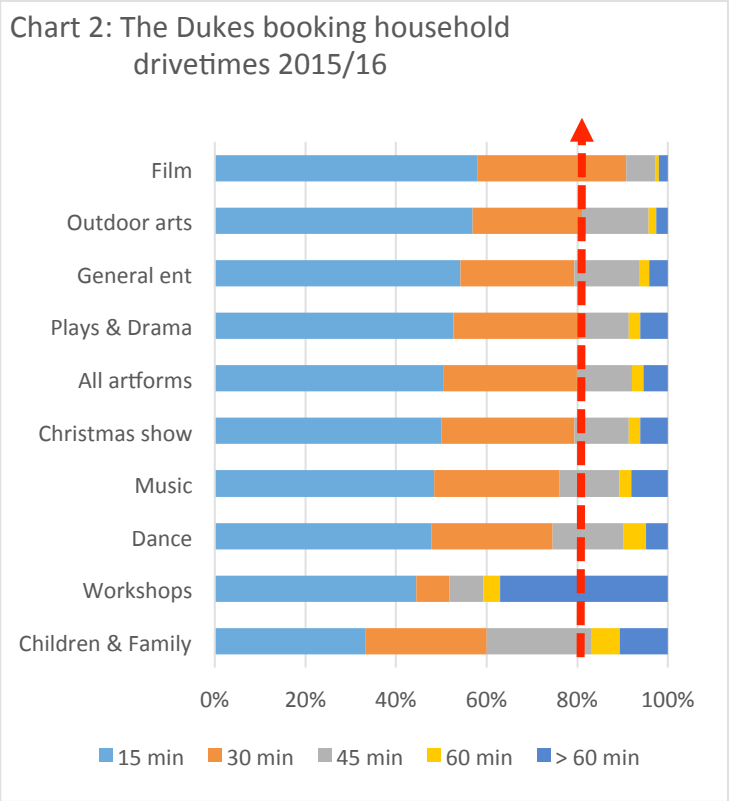


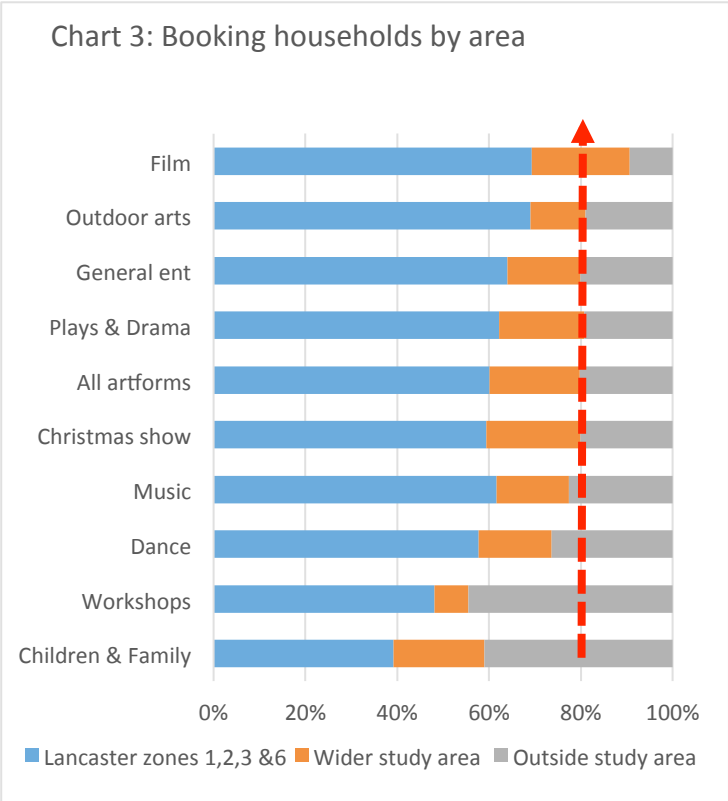


- The second map above right further illustrates this and highlights the area bounded by the top performing postal sectors that together account for 80% of all booking households (shaded in red). Although the area stretches into the 60 minute drivetime band near Ulverston, Nelson and towards Southport, the majority is within a 45 minute drivetime of the site.
- The findings suggest that although mapped radially, the catchment area for the Dukes could be up to an hour's drivetime; when we take into account the distribution of audiences within this area the catchment area could be considered to be smaller (between 30 and 45 minutes). Further factors that would also be taken into account are the differences in road speeds and population densities across the area and the influence of the coast which will require more caution in identifying a viable catchment area than in other areas.

Attenders by art form

- The NEMS household survey results suggest that the catchment area for cinema and theatre could be different with those attending theatre/concert halls appearing to be willing to travel further than those attending cinema. This is confirmed through by an analysis of the drivetime of booking households for each different artform, extracted from the audience finder booking household postal sector data (15,662 records) and shown in the charts 2 and 3.
- Chart 2 shows the proportion of booking households by drivetime band from the Dukes and chart 3, the proportion of booking households from the different NEMS study areas





- The charts confirm that a higher proportion of bookers for cinema reside locally than for other artforms. We should also consider that walk-up bookings may not be accounted for in the data but are also more likely to be local people. They also confirm that the catchment area for film/cinema is unlikely to be more than 30 minutes drivetime and largely confined to the study areas zones 1,2,3 & 6.
- The charts also confirm that a viable catchment area for all other artforms (with the exception of participatory activities and children/family shows which could potentially reach 60 minutes) is likely to be within 30 to 45 minutes drivetime and largely within the wider study area.
- Finally, it should be noted that the analysis draws on a relatively small number of booking households for dance, music and workshops which could potentially reach up to 45 minutes drivetime if provision is enhanced/increased.

2.3 Catchment area summary

Table 1 draws on the analysis and shows the catchment areas within which the following analysis of potential demand has been undertaken.

Table 1: Artform catchment areas	Identified catchment area	
	Drivetime (minutes)	NEMS study area equivalent
All artforms	30 -45	All zones
Film	30	Zones 1 to 7
Children & Family	60	All zones + outside study area
Christmas show	30	All zones
Dance	45	All zones + outside study area
General Ent	30	All zones
Music	45	All zones + outside study area
Plays & Drama	30	All zones
Workshops	60	All zones + outside study area

The findings indicate that we can expect 80% of overall demand for a cinema and performing arts venue to come from those living within a 30 - 45 minute drivetime of the site and for this to vary between artforms with demand for cinema largely from a smaller 30 minute drivetime catchment area and that for dance, music performances and children and family shows from a larger 45 to 60 minute drivetime catchment area.

3 Assessing market potential

Having identified the source of the majority of demand for cinema and live performance provision within the City, we can now draw on area profile data, the 2013 NEMS research, box office data extracted from the Audience Finder national box office system, Target Group Index and Taking Part Survey data (2015/16) to gain insights about the size of the market within the catchment areas for each artform.

Target Group Index (TGI) and Taking Part Survey are national surveys of adults which includes a number of questions about arts attendance and participation behaviours in the previous twelve-month period. Area based estimates are drawn from samples and whilst there is a tendency for those responding to over claim their attendance and engagement behaviours, the figures provide an indication of the engagement potential within any given area (the assumption being that those that respond positively have either attended recently or have an interest in attending).

3.1 For cinema provision

- The previous analysis indicates that the catchment area for cinema provision will be within a 30 minute drivetime and that we can expect this to be the source of 80% of audiences. We know from the NEMS research that 50% of adults in this area (zones 1 to 7) reported attending the cinema and that the 3 main venues in the Lancaster area hold approximately 82% share of this market (59% by the Vue, 16% by the Reel in Morecambe and 7% by The Dukes).
- The NEMS research does not identify the Take 2 Cinema on the University campus as holding any significant market share amongst resident adults, however, we can expect the majority of demand for this cinema to come

from full time students of which there are over 12,000 overall and approximately 4,700 who are full time and resident on campus.

- Area profile data for the catchment area indicates that the total population estimate (2013) is just over 200,200 (170,500 adults aged 15+). TGI data indicates that of these 122,400 (72%) have attended the cinema at least once in the past; 23,100 (14%) attend the cinema regularly (every 2 or 3 months) and 21,900 (13%) attend the cinema frequently (at least once a month). Although TGI data does not include a figure for annual cinema attendance we can estimate the potential annual audience by drawing on the most recent Taking Part survey results which indicate that 56.4% of all adults in England attend the cinema at least once a year which equates to 75% of all cinema attenders in England (taken from TGI data at 75% of all adults). If we assume that a similar proportion of those adults in the catchment area who have ever attended the cinema are likely to do so at least once a year this would equate to 54% of all adults (92,070).
- Having identified that the potential market for cinema within the catchment is 54% of adults, we can now draw on average frequency of attendance data to estimate total annual adult attendances. There are two sources of average frequency data: The Mintel Cinema Market report of November 2015 used for the LCC Commercial Leisure Study which estimates that the UK population on average visits a cinema 2.7 times per annum (equivalent to an average 5 times per annum amongst annual cinema going adults in the area); and, the Audience Finder national box office data (derived largely from art house type cinema box office systems) which indicate that on average audiences attend 3.37 times a year. If we take the higher of these two annual frequency figures we can derive an estimate of potential demand from within the catchment area at just over 460,000 adult attendances per annum. If we assume that demand associated with children is proportionate to the population breakdown this would equate to a total potential demand of 540,000 from the catchment area.
- If we account for the 20% of demand that is likely to originate from beyond the catchment area, we can derive a total estimate of potential demand for cinema within the Lancaster area at over 675,000 attendances per year.
- Finally, we know that in 2015/16 the Dukes attract 40,740 paid cinema attendances per year which equates to 6% share of the total potential market. However, we also know from the NEMS study that there is potential for it to attract at least 7% of the market share (assuming a similar market distribution to that observed in 2013) which would leave a potential additional market of approximately 6,600 attendances per year to be serviced by an enhanced cinema offer. Table 2 sets out a summary of these analysis steps.

Table 2: Summary of demand calculations: Cinema	
Catchment area	30 minutes drivetime (zones 1 to 7)
Catchment area population	200,200
Resident Adults (15+)	170,500
Estimated adult audiences per annum	92,100
Average frequency per annum	5
Total adult attendances from catchment	460,400
Estimated population attendances from catchment	540,600
Total demand (including outside catchment area)	675,700
Estimated minimum market share for enhanced provision	7%
Estimated minimum demand for enhanced provision	47,300
Existing demand: Dukes sales 15/16	40,700
Dukes existing market share	6%
Available additional market	6,600

3.2 For theatre/live performance and exhibitions

- The previous analysis indicates that we can expect the catchment area for live performances to be between 30 and 60 minutes drivetime of the city with plays and drama, general entertainment and Christmas shows attracting audiences from a closer proximity than dance and music performances and children & family events. Participatory activities also appear to attract participants from further afield with approximately half originating from outside the study area.
- The NEMS study findings reflect this and indicate that Lancaster currently attracts just under 22% of the total market share for arts and cultural trips originating from within the study area (all zones). They also indicate that a large share of the market is currently held by destinations outside the area, including Manchester and London; so there may be opportunity to increase market share through enhancements to local provision.
- We know from the Dukes box office data that currently 80% of plays & drama audiences, 75% of music and dance audiences, 60% of children and family show audiences and 50% of workshop attenders originate from the study area. We could reasonably expect at least a similar pattern of demand for new or enhanced provision within the city.
- As with cinema attendance, we can draw on area profile and TGI data to gain insights about the population and potential demand within the study area for a number of artforms including plays & drama, contemporary dance, music (based on rock & pop audiences), art exhibitions and theatre overall as illustrated in table 3 below.

Table 3: Potential audiences in study area (all zones)	Plays & Drama	Dance	Music	Art exhibitions	Theatre all
Expected % of audiences from area	80%	75%	75%	80%	80%
Study area population	414,169	414,169	414,169	414,169	414,169
Study area resident adults (15+)	351,970	351,970	351,970	351,970	351,970
Estimated adult audiences per annum	99,751	21,443	138,522	95,257	157,263
Audiences as % of all adults	28%	6%	39%	27%	45%
Average attendance frequency per annum	2.3	1.8	2.2	3.4	1.85
Total adult attendances per annum	229,427	38,597	304,748	323,874	290,937
Total potential demand from study area	269,971	45,418	358,603	381,108	342,350

- The table also draws on Audience Finder and regional Taking Part Survey data to estimate the average attendance frequency for each artform, from which a figure for the total adult market within the study area is derived. An assumption is made that demand associated with children is proportional to that of adults in deriving a figure for total demand originating from the study area for each artform.
- Although there are no equivalent TGI data associated with children and family performances or Christmas shows, we can draw estimates of demand for these from within the study area from the Audience Spectrum arts engagement profiles of typical artform audiences, the population profile in the area and Taking Part survey data.
- Audience Spectrum is a geographic segmentation framework that draws on a range of information sources, including Taking Part survey data, to classify the population into ten distinct segments. These segments fall into three categories: **Highly engaged** making up 58% of households in England; **Moderately engaged** accounting for 29% of households; and, **Least engaged** accounting for 14% of households. Pen portraits for each of the segments and further information about the framework development are available at https://www.theaudienceagency.org/audience-spectrum

- We know from national box office data that the profiles of those attending children, family and seasonal shows are predominantly made up of three Audience Spectrum segments: Commuterland Culturebuffs, Dormitory Dependables and Trips & Treats which together account for just over half (51%) of adults in the study area. The profiles of the Dukes existing audiences to these artforms confirms this with 72% of audiences for children & family events and 70% of audiences for Christmas performances characterized by these segments.
- We also know from Taking Part data that in the North West approximately 13% of adults attend pantomime at least once a year and that almost double this proportion attend other children or family performances. On the basis of these figures, the segment characteristics and their prevalence in the population it would seem reasonable to expect at least half of adults represented by Commuterland Culturebuffs, Dormitory Dependables and Trips & Treats to attend Children/family performances at least annually and half of this proportion (25% of adults represented by these segments in the study area) to attend Christmas shows at least annually.
- As with other artforms, we can apply Audience Finder national average attendance frequency figures to each of these audience groups to gain estimates of the total attendance potential originating from the study area as illustrated in table 4. In doing so, we have also made the same assumption that demand originating from children's attendances is proportional to their representation within the population which may be underestimated in the case of these artforms particularly.

Table 4: Potential audiences in study area	Children & family	Christmas
Expected % of audiences from area	60%	80%
Study area population	414,169	414,169
Study area resident adults (15+)	351,970	351,970
Estimated adult audiences per annum	87,954	43,977
Audiences as % of all adults	25%	12%
Average attendance frequency per annum	1.43	1.17
Total adult attendances per annum	125,774	51,453
Total demand from study area	148,001	60,546

3.3 For participatory activities

- To gain insights about potential demand for participatory activities such as workshops and dance classes we can draw on area profile data and Taking Part survey data.
- We know from Taking Part that within the North West an estimated 7.4% of adults participate in dance (not for fitness) at least annually but that the proportion increases to 11.5% for those aged 16 to 24.
- We also know from the Taking Part child survey data that nationally, 26.9% of children aged 5 to 10 years and 19.4% of children aged 11 to 15 years participate in dance at least annually and outside a school setting.
- Although participation can take many forms and is not limited to dance classes or indeed younger age groups, if we limit our analysis of potential demand to children aged 5 to 15 who already participate in dance activities and live within close proximity (15 minutes drivetime of Lancaster) we can derive a figure for potential demand for participatory dance activities in the city. In doing so, we can apply the average annual frequency of participation in workshops at 4.26 times drawn from the Audience Finder national database.
- We can follow a similar route to derive a figure for the potential demand for participatory theatre opportunities by drawing on Taking Part figures for those who have participated in theatre (plays/drama rehearsals or performances) outside a school setting and are aged between 5 and 15 years as illustrated in table 5.

Table 5: Potential demand for participatory activities	Theatre workshops	Dance classes
Expected % of audiences from area (1)	60%	100%
Area population (1)	414,169	141,051
Population aged 5 to 15 years	47,435	15,533
Estimated participants per annum	14,296	3,809
Participants as % of all 5-15 years	30%	25%
Average engagement frequency per annum	4.26	
Total potential engagement from area	60,901	16,225
(1) We have assumed that the study area for theatre participatory activities will be similar to that currently reported by The Dukes. However, we have also assumed that those participating in dance activities are likely to live within closer proximity (within 15 minutes drivetime of Lancaster).		

- It should be noted that the figures derived for total potential engagement in each area, whilst limited to existing engagers aged between 5 and 15, are based on figures relating to a wide range of engagement activities including workshops or dance classes. As such, they are likely to provide a more accurate reflection of potential amongst all age groups, including adults aged 16+ and younger children.

4 Accounting for competition

- Finally, and although we have already discounted competition in the demand for cinema calculations (by applying existing market share estimates from the NEMS study) there is still a need to account for competition associated with live performance and participatory activities. Also, and as with the demand for cinema calculations, we need to account for demand originating from outside the study area for each artform.
- We know from the NEMS study that Lancaster holds just over a fifth (21.7%) of the arts and cultural market share within the study area. If we assume this is uniform across all artforms we can derive an estimate of existing demand for provision within the City as set out in table 6.

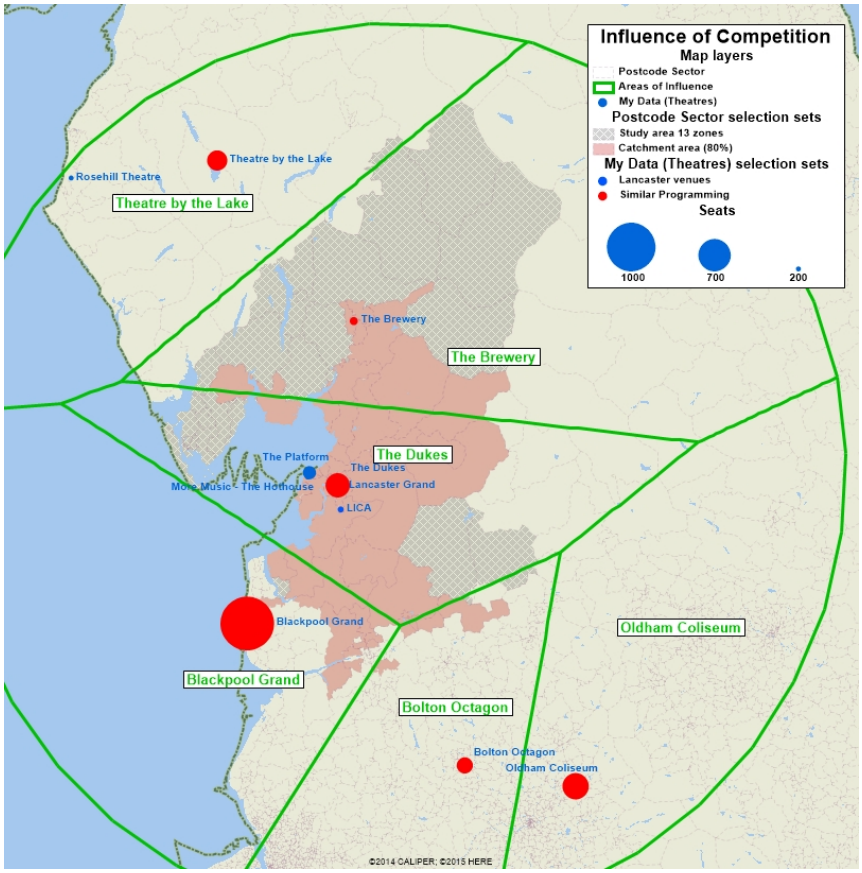
Table 6: Audience demand estimates	Plays & Drama	Dance	Music	Art exhibitions	Theatre all	Children & family	Christmas
Expected % of audiences from area	80%	75%	75%	80%	80%	60%	80%
Total demand from study area	269,971	45,418	358,603	381,108	342,350	148,001	60,546
Lancaster's share of demand from study area	22%	22%	22%	22%	22%	22%	22%
Demand potential from study area	58,584	9,856	77,817	82,700	74,290	32,116	13,138
Total demand (including outside study area)	**73,230**	**13,141**	**103,756**	**103,375**	**92,862**	**53,527**	**16,423**
The Dukes attendances 15/16	*8,516 (12%)*	*1,199 (9%)*	*776 (1%)*	-	*25,789 (28%)*	*97 (0%)*	*10,935 (67%)*

- The table includes total demand figures which account for demand from within and outside the study area (based on the drivetimes of existing audiences at the Dukes) and compares these with current annual attendance figures for the Dukes which currently holds between 0% and 67% share of the market for each artform. Data relating to existing exhibition attendances is not currently available.

- It should also be noted that the total demand estimates are for all provision of each artform within Lancaster including that offered by other venues like the Grand and Nuffield theatre and in the case of art exhibitions, the Storey and Peter Scott Gallery, of which account will need to be made in considering an optimal programming mix for any new venue or enhancements.
- We can use a similar method to derive a figure for the total potential demand for participatory activities such as theatre workshops and dance classes. In the case of theatre workshops for which demand is likely to come from across the study area and further afield, we can assume a similar proportion of the markets in these areas will participate in activities in Lancaster as attend events in the City. Whereas with dance classes, for which we have already assumed a market in much closer proximity to the City, we can assume that all demand can be serviced by provision within the City. The results are set out below.

Table 7: Participant demand estimates	Theatre workshops	Dance classes
Expected % of audiences from area	60%	100%
Total demand from study area	60,901	16,225
Lancaster's share of demand from study area	22%	100%
Demand potential from study area	13,216	16,225
Total demand (including outside study area)	22,026	16,225
The Dukes attendances 15/16	1,611 (7%)	-

- Whilst again the total demand potential figures relate to all provision within the City, they demonstrate clear potential to engage more participants in workshop activities.
- Finally, to gain insights about the distribution of competition across the catchment area, we can map out the areas of influence of those venues offering similar programming to the Dukes. The areas are identified by their proximity to each venue so do not take into account factors such as programming, wraparound or size of venue.
- The map shows that the majority of the existing catchment area and the most populous parts of the study area fall within the Dukes' area of influence, from where we can expect the bulk of audiences to originate.
- Table 8 draws on this analysis and existing booker postcodes and shows the proportion of existing audiences from each area of influence. It indicates that the Grand is likely to have greatest influence across most



artforms, the exceptions being for Dance and workshops for which Bolton Octagon is likely to have greater influence.

- The findings provide insights that should help position activities to minimize the influence of competition, for example by targeting areas where the competition is weak for the artform being advertised or by joining forces to provide complementary programmes or deliver joint marketing campaigns.

Table 8: Existing audiences from competitor markets	All audiences	Children/ Family	Christmas show	Dance	Music	Outdoor arts	Plays/ Drama	Workshops
The Brewery	7%	8%	8%	8%	7%	6%	8%	8%
Oldham Coliseum	2%	4%	3%	2%	3%	0%	2%	10%
The Dukes	73%	52%	73%	66%	72%	75%	75%	63%
Theatre by the Lake	0%	1%	1%	0%	0%	1%	1%	0%
Blackpool Grand	11%	20%	10%	9%	12%	15%	10%	5%
Bolton Octagon	6%	15%	6%	15%	6%	4%	4%	14%

5 Demand summary

Table 8 sets out a summary of the estimated demand for each artform and the basis of provision to which demand relates.

Artform	Catchment area (drivetime)	Potential demand	Basis of demand
Cinema	30	47,300	Additional to other provision in City
Plays & Drama	30	73,230	Including other provision in the City
Dance	45	13,141	
Music (based on rock & pop)	45	103,756	
Art exhibitions	30	103,375	
Children & family	60	53,527	
Christmas	30	16,423	
Theatre workshops	60	22,026	
Dance classes	15	16,225	

6 Audience analysis

The analysis of demand calculations is based on TGI, Taking Part and Audience Spectrum profile data for the study area. In all cases the data relates to existing audiences: people who either report having attended or participated in the artform or people characterized by segments that are typically highly engaged in the artform. In this section we draw on the Audience Spectrum profile framework to gain insights about these existing audiences, to identify opportunities to engage them and assess whether there are any opportunities to expand the market through audience development activity.

6.1 Audience profile comparisons

- Chart 4 overleaf draws on Audience Finder 2015/16 box office data for the Dukes and national and area profile data to compare the profiles of existing audiences at the Dukes, typical audiences and the population within the catchment areas for cinema (zones 1 to 7) and theatre (45 minutes drivetime).
- The Dukes audience profiles are based on the postcodes of 2,936 audiences for film and 8,300 audiences for theatre shows during 2015/16. Although the number of workshop bookings is not sufficient to provide an accurate profile, we can draw some insights from the typical profile of workshop attenders at other arts venues across England.
- To ensure like with like comparisons are made, the typical profile of theatre audiences has been derived from weighting the national profiles for each theatre artform (children & family, seasonal, dance, music, plays and drama and general entertainment) by the number of audiences attending each at the Dukes in 2015/16. These have then been combined to derive a comparable profile for the specific programme mix offered at the theatre.

6.2 Audiences for film/cinema

- There are clear similarities between the Dukes' film audiences and typical film audiences. However, a clear difference is the much smaller proportion of Metroculturals amongst the Dukes' audiences. Although this segment would typically account for at least 10% of film audiences, there are very few people in the catchment area represented by it and as such, would not produce viable target audiences.
- Four segments account for 75% of film audiences at the Dukes: **Commuterland Culturebuffs**, typically highly engaged, well off but time poor with broad cultural preferences; **Dormitory Dependables**, regular but infrequent attenders of popular and mainstream events; **Home & Heritage**, older infrequent attenders with conservative tastes, living locally and attracted to traditional programming; and, **Trips & Treats**, older families preferring popular and mainstream family-friendly as an occasional treat or outing.
- Amongst these segments Commuterland Culturebuffs and Dormitory Dependables are most predominant (and amongst film audiences generally) and account for almost half (46%) of all audiences. Although overrepresented, they account for just under a third of the adult population in the catchment area for cinema (approximately 51,500 adults). They also have a relatively high propensity to attend and so should be considered key target audience groups. In doing so, there will be a need to deliver a mixed programme that caters for the art house tastes of Commuterland Culturebuffs (for who alternatives will be some distance away) and mainstream tastes of Dormitory Dependables (who would otherwise attend more commercial venues).
- Although representing fewer audiences, Trips & Treats and Home & Heritage make up a further 29% of the Dukes film audiences and over a quarter of typical film audiences. As both groups are under-represented when compared with the population in the area (of which they represent 39%) and have a propensity to attend cinema (albeit less frequently) they should also be considered key target groups. Both groups are likely to engage with popular and mainstream films and Home & Heritage may also engage in the daytime.