

Torbay Great Place

Audience Evaluation Report 2020



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Introduction

Torbay in South Devon is an intriguing place. Famed for being a popular tourist destination, the seafronts of Torquay, Paignton and Brixham conjure up images of buckets and spades and fish and chips. Its mild climate and location around a natural harbour have seen it named the 'English Riviera' and with its plethora of attractions it has been, since the 19th Century, one of the go-to destinations for British visitors seeking a traditional seaside holiday.

Yet, Torbay is so much more than that. Torbay is a UNESCO Global Geopark, designated as such because of its important natural and geological history. Its beaches – 20 in total – are the highest concentration of Blue Flag beaches in England, and part of the South West Coast Path which stretches for 20 miles along the coast. At first glance the area feels coastal-urban with the three main towns that make up Torbay, and their outer-lying villages, becoming more closely connected over the years, something quite unusual in the wider South West region.

This conurbation of towns, however, is bordered by a rural hinterland that nestles this unique place within the valleys and rolling hills of South Devon. This means that Torbay feels different, and it is different – it is not just a destination for sea, sand and the Torbay palm trees, the distinctiveness of this place, and the breadth of what it has to offer, is reflected in its varied cultural offerings, and it is through culture that a place and its people can be understood.

From poetry to theatre; museums, open air events and participatory arts, the cultural offering of Torbay is as distinctive as its geography and heritage. The history of this place and its people is depicted at the Bay's three museums and the story of the area's most famous former resident, Agatha Christie, is one of the biggest draws for visitors. The theatres of Torbay bring to life local tales by local people, as well as popular national and international stage shows. There are community festivals and long-running festivals for specialist audiences. There are artists and artist-led programmes that seek to create innovation and regenerate the Bay as a creative centre; and all of this is sitting alongside the Global Geopark, the beaches, attractions, as well as country parks and events that celebrate the area's agricultural and maritime history. Diverse indeed, but the common thread is to connect the places and culture of Torbay to the people in Torbay, whether they are visitors or locals, as they are what help to make Torbay unique.

Local and National Context

There are around 134,000 people living in Torbay, with around one in four people aged over 65. Whilst this is consistent with the rest of the South West region and Devon particularly, which is a reliably popular retirement destination; it is higher than the average when compared to the general population of England. The rest of the population of Torbay is predominantly made up of younger people, which in itself is higher than the average for Devon. It is an overwhelmingly white area, even considering the incoming tourists and holiday-makers. Despite the high proportion of younger people, the number of people aged over 85 is expected to increase markedly over the next decade, and as more people move into the area compared to those who move out (already a trend prevalent in Devon as a whole) it is likely that the population's reliance on social and care services will increase. There are high levels of ill-health with around 68% of the population overweight or obese, and a high proportion of residents with long-term health issues, including disability.

Torbay is the most deprived local authority area in the South West, with some wards registering as being within the top 10% of the most deprived areas in England. Not only does this affect the majority of the population of over 65s, it also impacts on children and young people. A significant proportion of children in Torbay live in low income families, high levels of which are dependents in lone-parent households. Levels of GCSE attainment are also lower than the English average. These factors combined suggest that many of Torbay's population – children and young people, and the over 65s – face social and economic challenges that prevent mobility and impact on opportunity, and may also present barriers to engaging with culture.

Understanding audiences, why and how they do – and don't – engage is not something that cultural organisations in Torbay are unfamiliar with. In 2013 a data capture initiative called 'Summer of Data' was undertaken, which evaluated festivals and events across the summer at various sites in the Bay. The research project considered shared audiences as well as the economic impact of their attendance at the festivals and events. The report found that, whilst the events overall attracted people to the area and provided something that was of interest to a wide audience, there was a real need to reach out to the older audiences as well as those audiences from lower socio-economic backgrounds that make up the majority of the local population. Whilst these audiences were engaging less, activities with a family-friendly focus were more successful at engaging these harder-to-reach groups in Torbay. There was also a growing need for better, more targeted marketing balanced against the area's intrinsic challenge of catering to the needs and wants of both visitors, who create a positive impact on the economy, alongside local residents.

Similar results were generated by the 2016 English Riviera Visitor Survey, produced by The South West Research Company LTD on behalf of TDA. This survey looked at visitors to the area in order to assess the strength of the tourism offer. The research found that in 2016 there was a higher proportion of more affluent holiday-makers visiting compared to 2013 and that an impressive 87% were repeat visitors to the area. Yet the report found that for those who were non-visitors to the area, or indeed what were termed as 'lapsed' (e.g. hadn't visited the area in the previous three years), personal circumstance and competition from other areas were the real barriers to those people engaging with what was on offer. The report also identified that the majority of people surveyed were there for the traditional seaside offering. Although general awareness of local attractions or attendance at events/festivals had increased since 2013, only 14% of those surveyed participated in arts or cultural activities despite 46% stating that they looked for history/heritage and culture when choosing a destination, and 55% saying that they could find it on the English Riviera.

It is suggested in previous reports that there is a perception that arts and culture are not part of the broader 'offer' of Torbay, and that there were still barriers between awareness of culture and actively getting people through the doors at cultural venues. With this in mind, and as part of the Great Place Scheme programme, a non-user project was commissioned in 2018 called 'The 99'. Developed and delivered by Wonder Associates the project brought together non-users of culture to create an audience panel, made up entirely of Torbay residents, who could provide a real and critical voice on awareness, perceptions, why they don't and how they would engage with the cultural offering in Torbay. The most engaged members of the panel were aged 55 – 64. The members overwhelmingly reported that they visited more traditional leisure activities such as the cinema, and they chose not to attend cultural events or venues because they felt that there were particular barriers to entry. The panel identified feeling like what was on offer wasn't for them, particularly because of their age (with 18 – 24 year olds reporting this the most frequently) or because they felt that the art form itself was either too high concept or had been put on with other people in mind, such as tourists. Perception around pricing, low awareness of what was going on, or how to find out about events/activities, were also real barriers. The biggest motivations for attending were to be entertained and to spend time with family or friends. It is worth noting that, whereas 'The 99' research project focused on non-visitors, this research project focuses explicitly on audiences that do visit cultural organisations and attend events. The intention is that this research will complement existing research such as 'The 99' Project.

These particular motivations consistently appeared throughout all three of the aforementioned datasets as, ultimately, people engage with culture, visitor attractions or tourist offers in their leisure time as a social activity. The findings of these three particular reports have supported the anecdotal understanding of audiences at organisations across Torbay by providing an evidence base by which they could undertake a more informed approach to audience development.

The data and the findings noted above are consistent with the national picture of cultural audiences. Data from The Audience Agency's 2018 'Museum Audiences Report,' presenting data from Audience Finder, based on a sample of 39,318 visitors to 105 museums, identifies that older audiences are generally more highly represented at museums, with 41% of visitors being over the age of 55. Whilst the report also identifies that 52% of visitors are deemed to be local (living within a 30 minute drive-time of the museum) it also states that 42% of attendees had low levels of cultural engagement and lived within 15 minutes of the museum they were visiting; this was compared to the audiences who were highly engaged with culture and would travel over 60 minutes to visit a museum. The primary motivation for these visitors is that they want to learn something, and those who are regular visitors will go to the same museum on average around three times a year. Museums, unlike any other art form surveyed by The Audience Agency, attract a higher proportion of family visitors.

According to The Audience Agency's 'Outdoor Arts' report (2018), 84% of attendees to outdoors arts events were engaging as part of mixed groups, including both adult and children. This is particularly interesting as the motivations for attending were commonly social and to be entertained – much like the motivations of 'The 99' in Torbay. This data is from a sample of 14,479 respondents to the Audience Finder survey implemented at 51 organisations/festivals. The age range of outdoor arts audiences was younger overall, at 25 – 44, and they were found to be predominantly local, as connection or interaction with the community was especially valued. The report also found that in some places outdoor arts had been proven to successfully bring together different parts of a community, including groups that are ethnically diverse.

Within Visual Arts, more so than other art forms, the audiences most reflect the ethnic make-up of the population of England, as shown from data collected by the Audience Agency 'Visual Arts Report' 2019; this is from a sample of 55,000 visitors to 104 galleries in England. Whilst there is some variation in audience profiles and motivation across the different types of visual arts, around 50% of visitors belonged to the groups most highly engaged with culture; Black Asian and Minority Ethnic (BAME) groups engaged more frequently and attendees were also younger than most other art forms as well.

How does this national picture impact on an understanding of audiences in Torbay, and across its broad spectrum of cultural offerings? And, how do both local and tourist audiences engage with the cultural offer in Torbay? This Audience Evaluation Project, commissioned as part of the Torbay Great Place Scheme, sought to address these questions. The project, which was delivered by South West Museum Development, applying the South West Visitor Insights methodology, sought to develop a collective understanding of cultural audiences in Torbay through the implementation of sustainable, effective and light-touch data capture systems that would help realise and describe who the cultural audiences in Torbay are. This report presents the results of over 3,000 visitor surveys that were captured from ten cultural organisations between April to December 2019.

Please see links to resources and the surveys/reports mentioned in this section at the end of this report.

Executive Summary

The aim of this project was to support cultural organisations in Torbay to conduct audience evaluation and to collect audience data in 2019. Ten organisations participated in the audience data collection and over 3,000 survey responses were gathered between April - December 2019. Below is a brief summary of some of the highlights from the survey data.

Overall, the results present a picture of really positive cultural engagements happening in Torbay as well as potential room for cultural organisations to grow and engage new audiences. One of the most positive results is the very high level of satisfaction among audiences with the cultural offer in Torbay; on average 89% of audiences rated their experience with 4/5 or 5/5.

Resulting data from the marketing questions suggest that audiences access information about the cultural offer in Torbay via a wide range of marketing channels. Both digital and physical marketing are very important to audiences accessing the cultural offer in Torbay. Digital channels such as social media and websites account for 38% of responses and physical channels such as flyers and posters account for 37%. The remaining is 'other' and 'word of mouth'. There are potential opportunities for cultural organisations to share best practice in developing their marketing channels for different audiences.

The picture is also varied when it comes to where audiences visit from; locally or beyond. Generally, the participating organisations either have a predominantly local or predominantly tourist audience. Nonetheless, in cases where organisations have a high proportion of tourist audiences, local audiences remain a significant and clearly important part of their audience as well. Given that some organisations have good access to particular local or tourist audiences, there are clear opportunities to cross-market the offer among cultural organisations in Torbay.

The data collected through this project has provided a robust insight into the social and demographic make-up of audiences engaging with the cultural offer in Torbay. On



Figure 1: Brixham Harbour, BrixFest 2019 © Amanda Harman Photography



Figure 2: Eyeview (extra)ordinary 2019 © SWMD

average families make up 29% of visitors to cultural organisations and events in Torbay; the remainder are adult groups (56%), lone visitors (12%), or organised groups (3%). These results are particularly important with regard to both future programming/activity planning and marketing strategies as the family and non-family status of visiting groups is key to determining both the kind of offer they want and the kinds of marketing material/channels they will respond to.

Results from the 2011 UK Census show that the level of disability in Torbay is 24%; however, the level of disability among audiences visiting participating cultural organisations is on average 15%. There is potential scope to improve engagement with disabled communities in Torbay; to improve access; and to improve awareness of current accessible cultural offers.

The proportion of people from Black, Asian and Minority Ethnic (BAME) backgrounds in Torbay is 2.5% (2011 UK Census). This research project shows that on average 4% of audiences who visited participating organisations were from a BAME background, which might suggest that cultural organisations are representative of ethnic groups in the local population.

As noted in the introduction to this report, the number of local people aged over 65 in Torbay is higher than the national average. This is reflected in the results of this research which showed that on average 45 - 74 year olds make up 55% of audiences. Younger adults make up a much smaller overall proportion of audiences, with 16 - 44 year olds making up an average of only 24%. The average number of under 16s is 13% which is consistent with the proportion of family visits (29%) assuming families are typically made up of two adults and two children. Again, there is variation among participating cultural organisations in the number of older or younger visitors they attract. There may be opportunities for organisations to share best practice in engaging different age groups, not least because age is an important determinant in the types of cultural activity audiences engage with.

Finally, using CACI Acorn segmentation, the postcode data collected through this research has provided detailed insight into both the geographic distribution of audiences and their socio-economic background. On average 52% of audiences live within Torbay (unitary authority boundary); despite the high proportion of non-local visitors (tourists = 48%), this reinforces the importance of local audiences to Torbay's cultural organisations, and perhaps more importantly the importance of the cultural offer to the local population.

The socio-economic segmentation of audiences has revealed that on average 40% of local audiences (Torbay postcodes only) who are engaging with the cultural offer in Torbay are from a disadvantaged socio-economic background. The Acorn data shows that in Torbay 48% of the local population are from disadvantaged socio-economic backgrounds. Despite the 8% underrepresentation of these groups, this research suggests that, in fact, the cultural offer from participating organisations is reaching a diverse range of local audiences from a variety of cultural, social, economic and ethnic backgrounds. This is a result that should be acknowledged and celebrated, and where there is room for improvement there are excellent opportunities for the cultural organisations in Torbay to work together and share their best practice for engaging audiences from all backgrounds.

This report was prepared by South West Museum Development Programme, South West Visitor Insights Team on behalf of Torbay Culture in February 2020.



Figure 3: iPad visitor survey at Torre Abbey © SWMD

Research Approach and Methods

This section details the process by which we recruited participant organisations to the project and outlines the specific audience evaluation approaches we developed with the ten participating organisations in Torbay.



Figure 4: Visitor Survey at BrixFest 2019 © Amanda Harman Photography

Phase One: Recruiting participant organisations

South West Museum Development began working with organisations in Torbay, and the Torbay Great Place Scheme, in November 2018. Following a process of initial desk-based research, and after the project was commissioned in September 2018, the project was introduced to cultural organisations in Torbay at workshop for 'The 99' project on the 19th September 2018. Following this, on the 27th November 2018, the SWMD team hosted a launch workshop at the Lucky 7 Club in Paignton and invited a variety of organisations from across the Bay to learn more about the project and how they could be involved. With a strong and practically-gained background in audience data capture and user research at museums, community, heritage and events across the South West, the Audience Evaluation team were able to demonstrate to attendees how their experience could support organisations individually and collectively to capture data that would add real value to the development of their audiences. Figure 5 shows organisations identified by the Torbay Great Place programme for assessment as potential participants of the project, with those who attended the launch workshop, and those who participated in the project, indicated alongside.

Following the workshop, further desk-based research was undertaken; organisations were asked to provide details of their existing data capture systems in order to establish an understanding of audiences in Torbay and measure the strength of what, and how, audience data was captured. Each of the organisations listed below in Figure 5 were contacted by the project team; organisations who did not respond in the first round of contact were contacted again in the early-Summer of 2019 and, although a couple of organisations did begin conversations with the project team, they considered that the timing and/or requirements of this project were not within their capacity to adopt; as such the Audience Evaluation project identified a cohort of ten cultural organisations/venues, events and festivals that actively captured audience data in 2019.

	Launch workshop attendee	Audience Evaluation project participant
Artizan Gallery	Yes	Yes
Babbacombe Theatre		
BrixFest		Yes
Brixham Heritage Centre	Yes	
Brixham Theatre		
Cockington Court		Yes
Daisi		
Dance in Devon		
Doorstep Arts	Yes	
Encounters Arts		
England's Seafood Feast		
English Riviera Film Festival	Yes	
Eyeview programme - Great Place Torbay arts programme	Yes	Yes
Geopark Festival		
International Agatha Christie Festival	Yes	
Libraries Unlimited		
Lucky 7 Club	Yes	
Palace Theatre	Yes	Yes
Princess Theatre		Yes – contextual data sharing
Sound Communities		
Squirle Arts		Yes (via BrixFest)
Torbay Coast & Countryside Trust		
Torbay Council	Yes	
Torbay Festival of Poetry	Yes	Yes
Torquay Museum	Yes	Yes
Torre Abbey	Yes	Yes

Figure 5: Recruiting participant organisations

Phase Two: Site visits and bespoke research methods

In February 2019, the evaluation project team made site visits to all organisations that had been recruited on to the project. The aim of these initial site visits was to understand the unique needs and challenges of each organisation to collect audience data. Based on our site visits three approaches to collecting audience data were recommended:

- 1) **Self-complete iPad surveys** – this method involved installing a survey on an iPad which is displayed on a kiosk stand in a public space. Visitors were encouraged by front of house teams to give feedback about their experience. This method worked well in fixed site spaces where visitors are free to explore the space in their own time, such as a museum/gallery/historic house setting. It was particularly effective for generating high volumes of survey respondents as it was very accessible and permanently available. This approach requires central coordination and administration, which was provided for the duration of the project by SWMD.
- 2) **Post-event email surveys** – this method involved sending visitors a link to a survey in an email after they have attended a site or event. This method either required access to visitor email addresses or access to audiences via social media such as Facebook Events; therefore it worked well where an organisation has a box office. It also worked well in circumstances where visitors had limited free time whilst visiting, such as attending a theatre performance or participatory event.
- 3) **Face-to-face surveys** – this method involved asking visitors directly to complete a survey. This method required trained individuals (staff or volunteers) to conduct surveys whilst visitors were on site. This method worked well in outdoor sites when the amount of time visitors were engaged is very short and access was free, such as a free-to-enter festival. Surveying was predominantly delivered by SWMD, supported by Torbay Culture Ambassadors and volunteers.

The following table details the particular method, software used, and number of survey responses at each of the participating cultural organisations collected from April 2019 to the end of December 2019.

	Method	Software	No. Survey Responses
Artizan Gallery	Self-complete iPad surveys	Google Forms	49
BrixFest	Face-to-face surveys	Feed2Go App	210
Cockington Court - Indoor	Self-complete iPad surveys	Google Forms	702
Cockington Court - Outdoor	Face-to-face surveys	Feed2Go App	21
Eyeview (extra)ordinary	Face-to-face and post-event email surveys	Feed2Go App/Survey Monkey	47
Eyeview pop-up shop	Self-complete iPad surveys	Google Forms	11
Eyeview Wavelength	Self-complete survey forms and post-event email surveys	Paper surveys/Survey Monkey	260
Palace Theatre	Post-event email surveys	Google Forms	712
Torbay Festival of Poetry	Self-complete survey forms	Paper surveys/Survey Monkey	35
Torquay Museum	Self-complete iPad surveys	Survey Monkey	514
Torre Abbey	Self-complete iPad surveys (x2)	Survey Monkey	824
		Total	3385

Figure 6: Methods, software and number of survey responses

Results

This section pulls together the results from the audience surveys conducted at the ten participating organisations.

Key to the success of this project was that each organisation was supported to develop a bespoke survey that suited their needs whilst aiming to ensure a degree of consistency that would mean data was comparable between organisations locally and nationally. There were a series of fifteen questions that featured on the majority of the organisations' surveys; if the question did not feature in their survey that organisation will not appear in the relevant table. The following sections provide the results from these shared questions. Any additional questions that were unique to particular organisations do not feature in this report as they are not comparable across organisations. Any unique questions and the corresponding results will be available to each organisation in their individual reports (provided separately as part of the project).

10 cultural organisations

15 shared questions

3,385 survey responses

Repeat visits

Visitors were asked if they had visited the cultural organisation or been to the same event in the past. The aim of the question was to understand if a site/event has a high number of repeat visitors or first time/new visitors.

Torre Abbey (71% first time visitors) and Torquay Museum (69%) had the highest proportion of first time visitors; whereas Torbay Festival of Poetry (97% repeat visitors) and Palace Theatre (82%) had the highest proportion of repeat visitors.

The value of repeat visitors is in building organisational or brand loyalty and is acknowledged as confirmation that an organisation is delivering an offer that meets the needs of its audiences. However, the risk is that this can indicate a lack of wider visibility of the organisation/event/offer to new and more diverse audiences.

The value of new visitors is in diversifying audiences; this can lead to higher overall visitor numbers, income generating opportunities, and demographic diversity among visitors. The risk is that high levels of first time visitors can sometimes indicate a number of potential things, including high proportion of non-local visitors, or, that visitors are not returning due to a lack of satisfaction with initial visits, or, a feeling that one visit is all that is needed.

Repeat visits (by organisation)

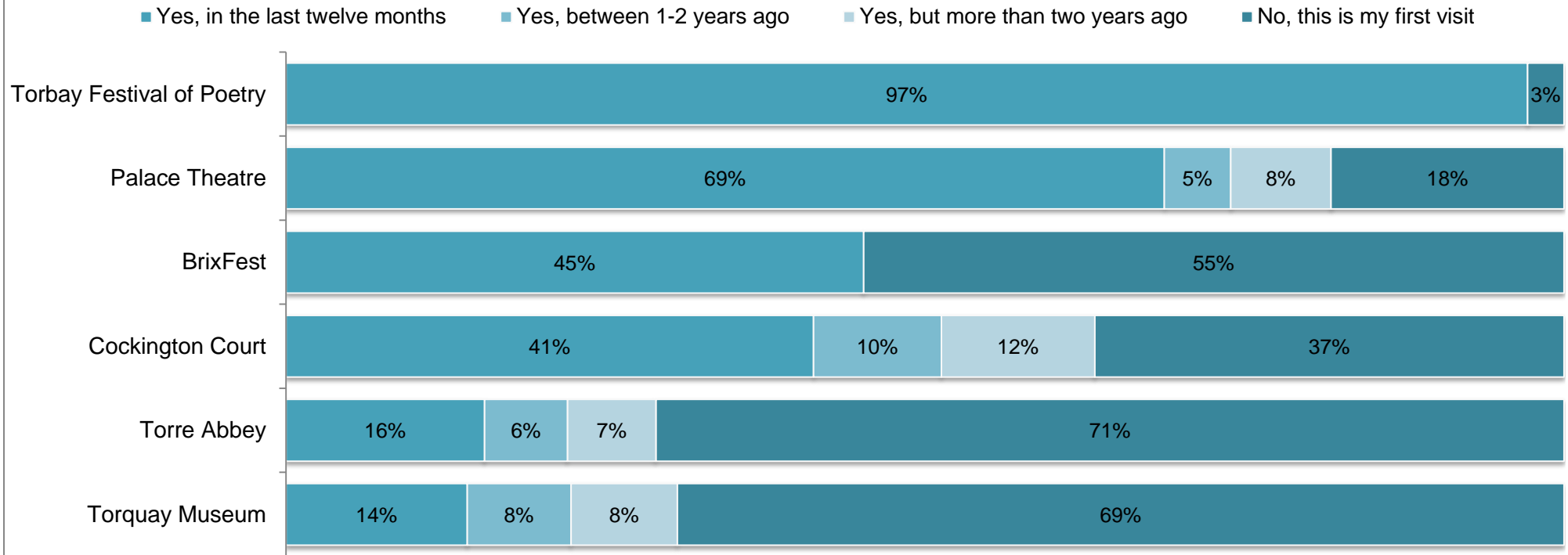


Figure 7: Repeat visits (by organisation)

Repeat visits (weighted average*)

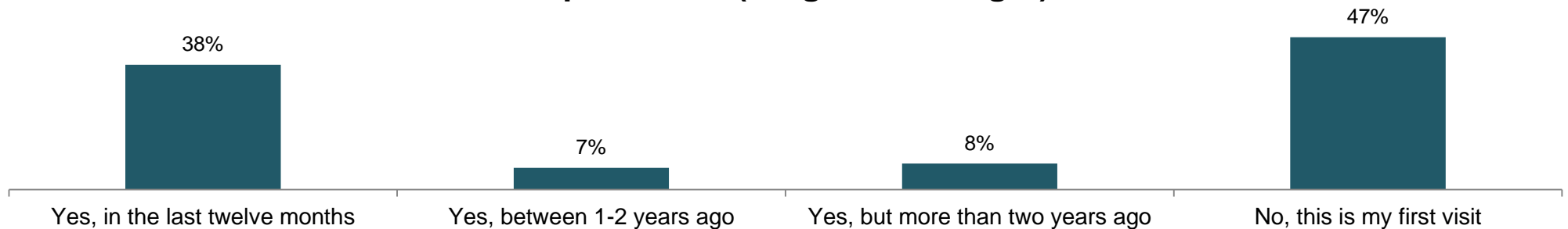


Figure 8: Repeat Visits (weighted average*)

* Weighted average is calculated by taking the average of the whole data set rather than an 'average of averages'

Satisfaction / Quality Rating

Visitors were asked a question about their satisfaction with their visit/experience. Overall, the results were very positive with an average of 89% giving either 5/5 or 4/5 for satisfaction. Dissatisfaction was also very low across all sites with an average of only 3% giving 1/5 for satisfaction.

These results suggest that there may be very few issues with the quality of experience being offered by the participating cultural organisations in Torbay. Conversely, this figure could demonstrate low expectations among audiences.

Average 89% satisfaction

Satisfaction/quality rating (by organisation)

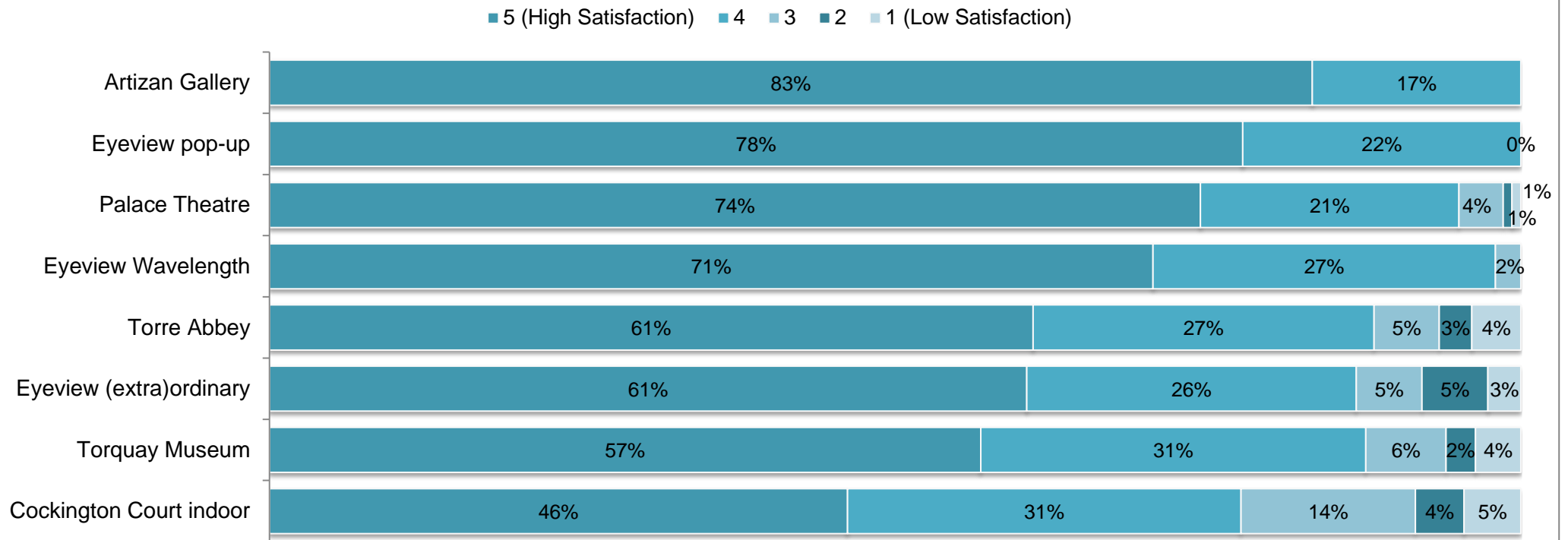


Figure 9: Satisfaction/quality rating (by organisation)

Satisfaction/quality rating (weighted average)

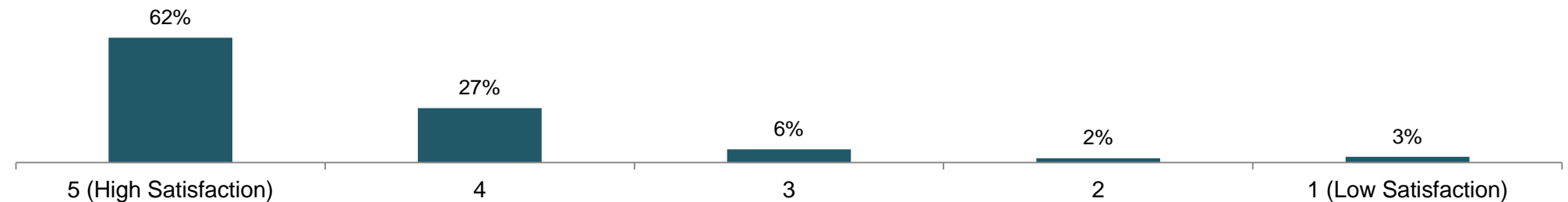


Figure 10: Satisfaction/quality rating (weighted average)

Motivation

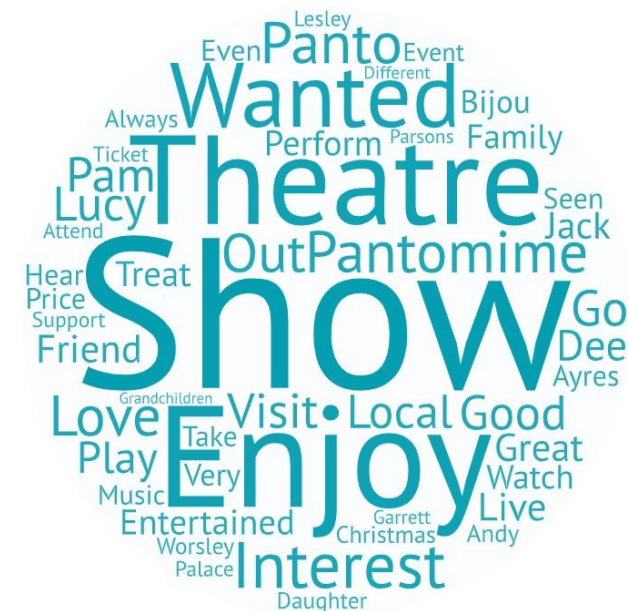
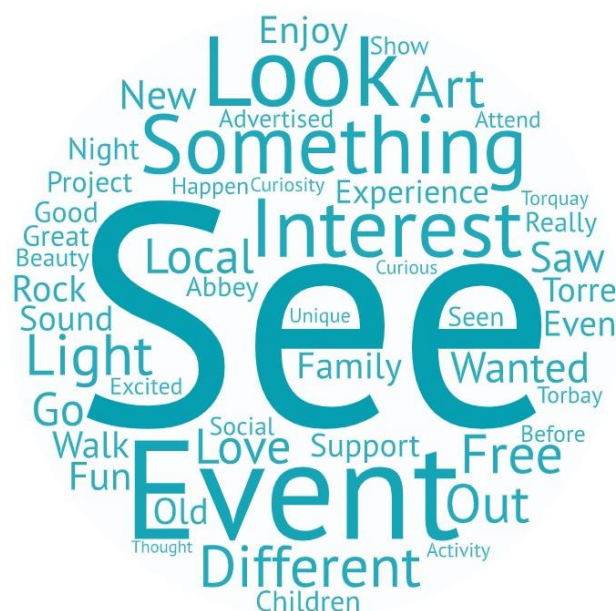
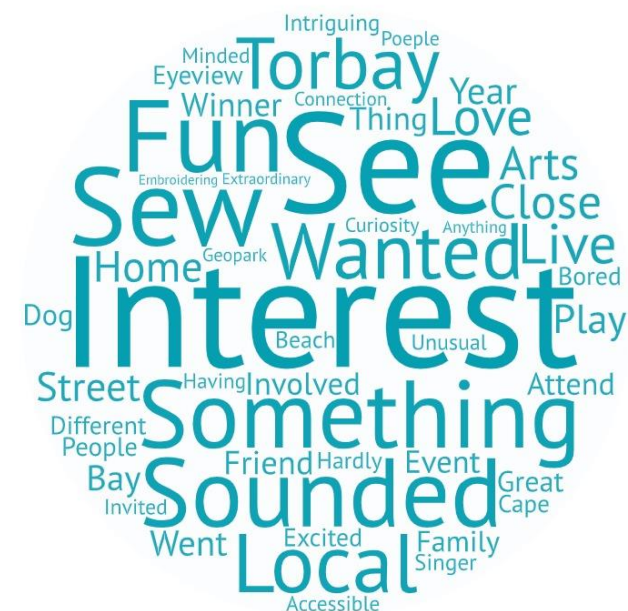
Visitors were asked about the main reason for their visit on that day. They were given a free text box to provide their answer. The aim of this question was to understand what motivates visitors to visit cultural organisations and to attend events. This question also indicates if visitor motivations match the intended aims of the offer from each cultural organisation or event. In other words, this can tell us if visitors know what to expect from their visit.

The results from this question are presented as word clouds; these are produced using software that presents the most frequently repeated words in the largest font.

Overall, the results show good consistency between the offer from each cultural organisation and the motivations of visitors. For example, the most common words from visitors to Torquay museum are 'Agatha', 'Christie' and 'Exhibit' (NB. the word cloud for Torquay Museum shows the spelling of 'Christie' as 'Christy', a misspelling as entered into the survey by visitors). This is also helpful in telling us what visitors most value about visiting an organisation or event.



Figure 11: All Sites 'Motivation for Visit



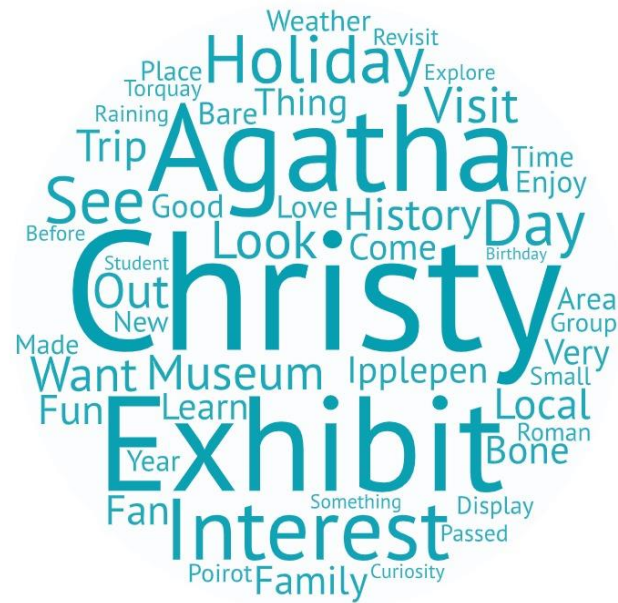


Figure 18: Torquay Museum 'Motivation for Visit'



Figure 19: Torre Abbey 'Motivation for Visit'

Marketing: Site Specific

Visitors were asked how they heard about the cultural organisation or event prior to their visit. They were then either given a drop down list of choices to select from along with the option to specify 'other', or alternatively a free text box.

Overall, the most common marketing channels were Facebook (avg. 16%); and all social media combined (avg. 24%). Physical media is still very important, with Brochures and Flyers (avg. 15%) and Banners and Posters (avg. 9%) proving successful means of communicating with audiences.

Organisations with higher proportions of tourist audiences such as Torquay Museum are making effective use of a local tourism brochure/guide (30%), whereas organisations with higher local audiences, such as Palace Theatre, have higher than average traffic to their own website (33%).

Social Media 24%

Marketing (Site Specific)	Eyeview Wavelength	Eyeview (extra)ordinary	BrixFest	Torquay Museum	Palace Theatre
Facebook	47%	39%	19%	4%	0%
Brochure or flyer	9%	9%	27%	0%	22%
Organisation's website	0%	0%	0%	10%	33%
Other	8%	6%	19%	23%	4%
Word of mouth	17%	22%	0%	14%	13%
Banners or posters	6%	7%	26%	0%	8%
Tourism guide	0%	0%	0%	30%	0%
Social media	0%	0%	0%	0%	18%
Walking past	3%	0%	0%	16%	0%
Local newspaper/magazine	3%	4%	7%	2%	0%
Instagram	3%	4%	1%	1%	0%
Twitter	3%	4%	0%	0%	0%
Email	0%	0%	0%	0%	2%
I've been involved in the project	2%	6%	0%	0%	0%

Figure 20: Marketing (Site Specific)

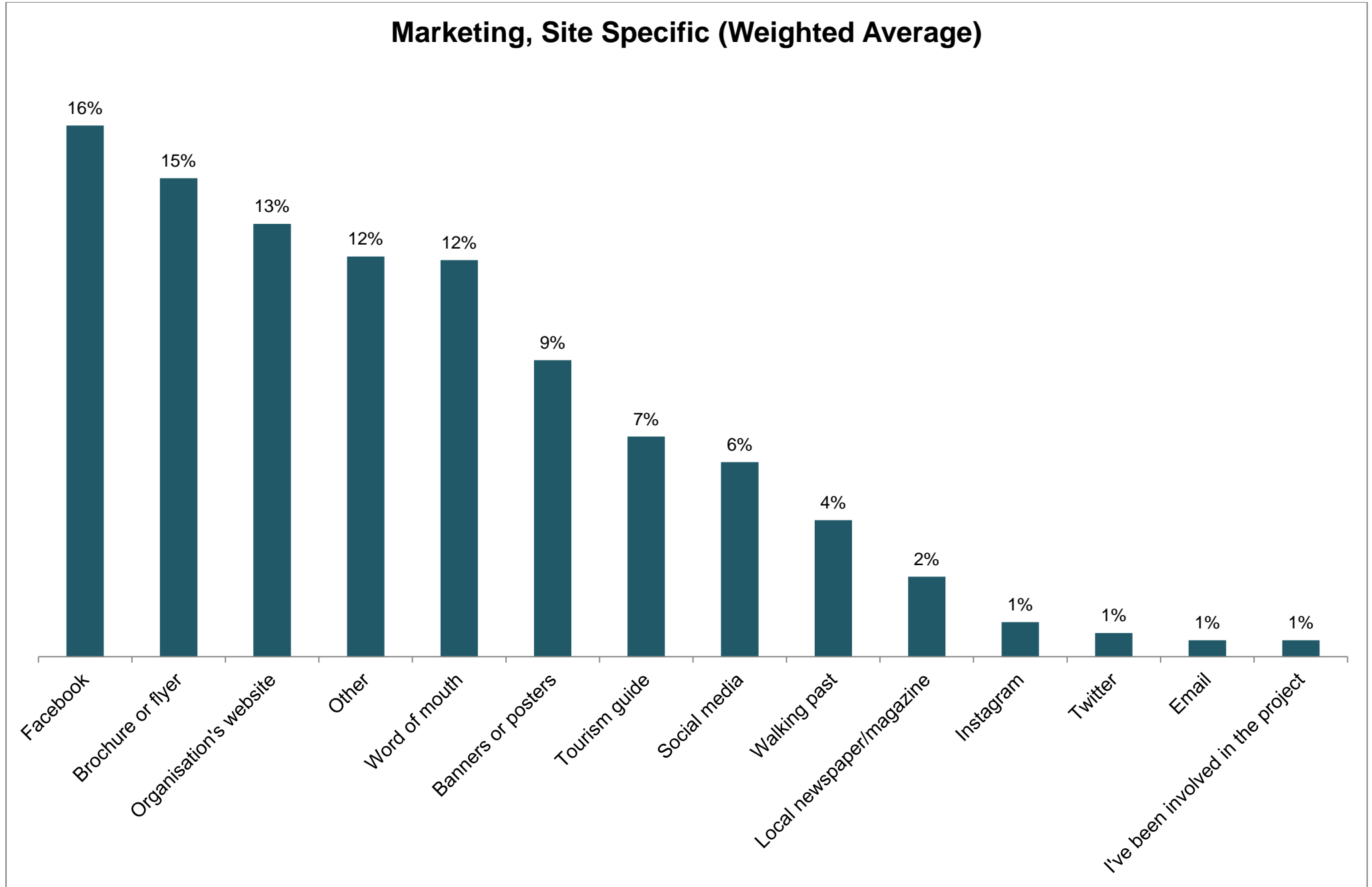


Figure 21: Marketing (Site Specific) (Weighted Average)

Marketing: Torbay

Visitors were asked how they usually hear about things going on in Torbay. Visitors provided answers in a free text box, the responses to which are represented on the following page as a word cloud.

The aim of this question is to understand the key marketing channels used by both locals and tourists looking for things to do in Torbay. This is useful to cultural organisations in developing their marketing channels.

Overall, the results of this question correlate well with the 'Marketing: Site Specific' responses in the previous section. This suggests that generally organisations are maximising the marketing channels that audiences are accessing.

Top results **Online/Internet**,
Facebook and **Leaflet**

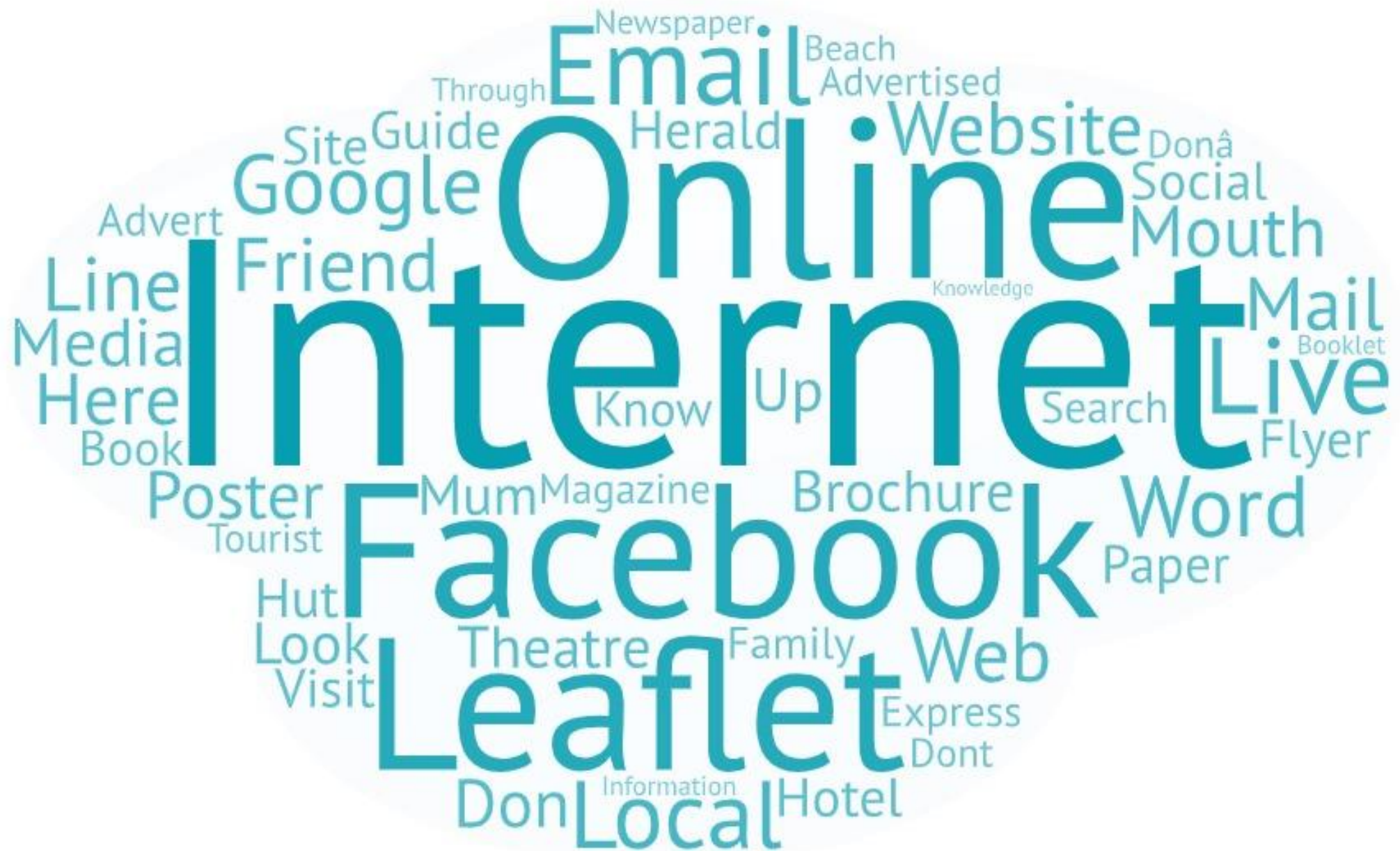


Figure 22: All Sites 'Marketing: Torbay'

Favourite Things

Visitors were asked what their favourite thing was about their visit/experience. They provided answers in a free text box. The responses are represented below in a word cloud.

The aim of this question is to understand what visitors most like about their visit, their experience, or about the particular offer at an organisation or event. This question can be useful in shaping marketing material. For example, if visitors repeatedly say they like a particular exhibit or part of an event then future marketing material can emphasise those same things in order to attract more visitors.

When combining the responses from all sites (see Figure 23) the top results were 'Good' and 'Atmosphere'. This is a useful indication that visitors to cultural organisations and events in Torbay really value their experiences.



Figure 23: All Sites 'Favourite Things'

Things to Improve

Visitors were asked what they would improve about the cultural organisations or events they visited/attended. They provided answers in a free text box. The responses are represented below in a word cloud.

The aim of this question is to give visitors the chance to report any negative experiences they may have had, but more importantly to offer their ideas and input for ways that their experience could be improved.

The overwhelming majority of responses to this question were either that there is 'Nothing' to improve, or that they would like 'More' of the current offer. This suggests that audiences are generally happy with their experiences, but also that there is demand for more cultural experiences in Torbay.



Figure 33: All Sites 'Things to Improve'



Local and Tourist Audiences

Visitors were asked if they were visiting either 'from the local area (approx. 30 minute drive time)'; 'as part of a day trip'; or 'as part of an overnight stay'. The aim of this question was to understand if visitors are local or tourists, as well as help determine the visibility of the organisation amongst the local population.

The results show a high degree of variation between cultural organisations with Torre Abbey, Torbay Poetry Festival, and Cockington Court all having over 50% tourist visitors and the other cultural organisations having over 50% local visitors.

Average 58% local visitors

Local and Tourist Audiences (by organisation)

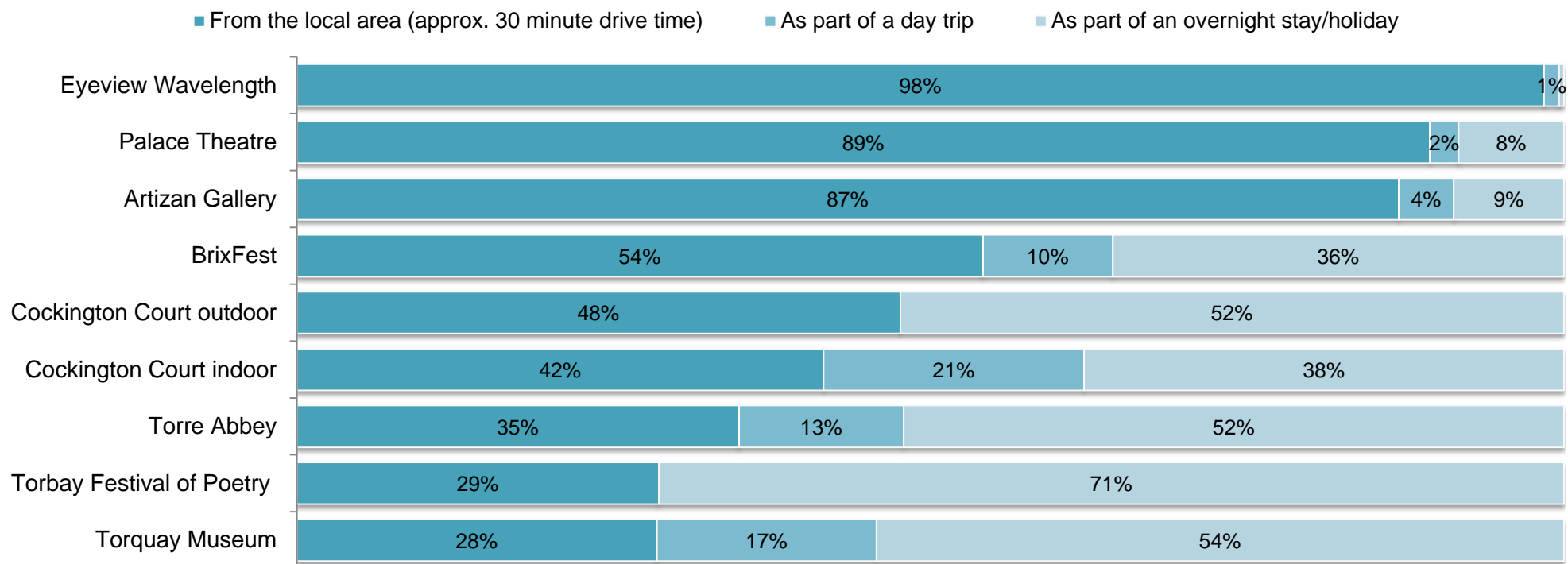


Figure 42: Local and Tourist Audiences (by organisation)

Local and Tourist Audiences (weighted average)

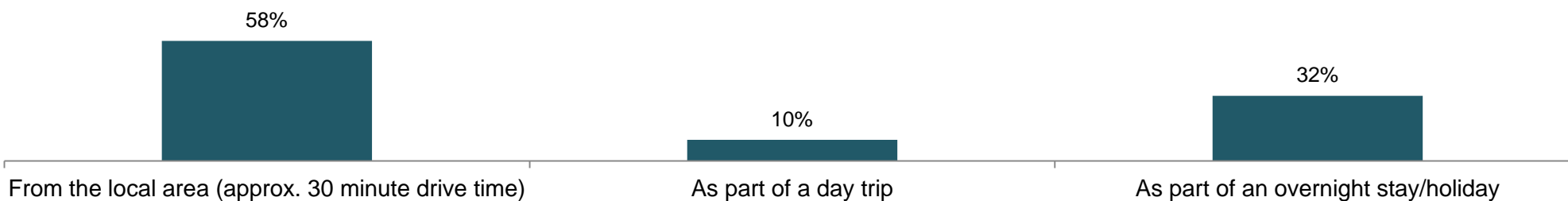


Figure 43: Local and Tourist Audiences (weighted average)

Group Age

Visitors were asked if they were visiting with other people and if so, what age groups they were visiting with or if they were visiting as part of an organised group. This data has been aggregated into four group options: 'Family with children 16 and under'; 'Adult group'; 'No group/alone'; and 'Organised group'.

The aim of this question is to understand the nature of the social groupings in which people visit cultural organisations and events. The responses can be really useful in understanding if an organisation is reaching its target audiences or not. It is very common for activities such as exhibitions and events to be developed for either family or adult groups; these groups often have very different needs, so ensuring the target audience is reached is critical to success.

Overall, 29% of groups visit with children 16 and under; 68% visit alone or without children in their group; whilst 3% visit as part of an organised group.

Average 29% families

Group Age (by organisation)

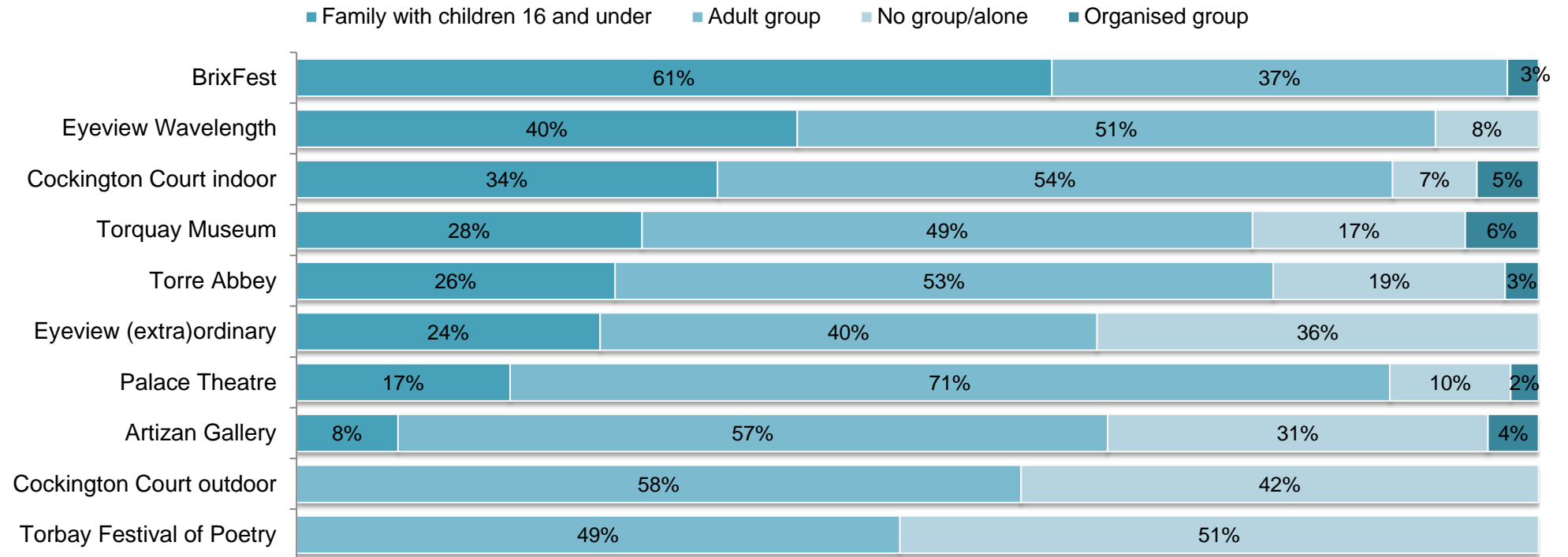


Figure 44: Group Age (By Organisation)

Group Age (weighted average)

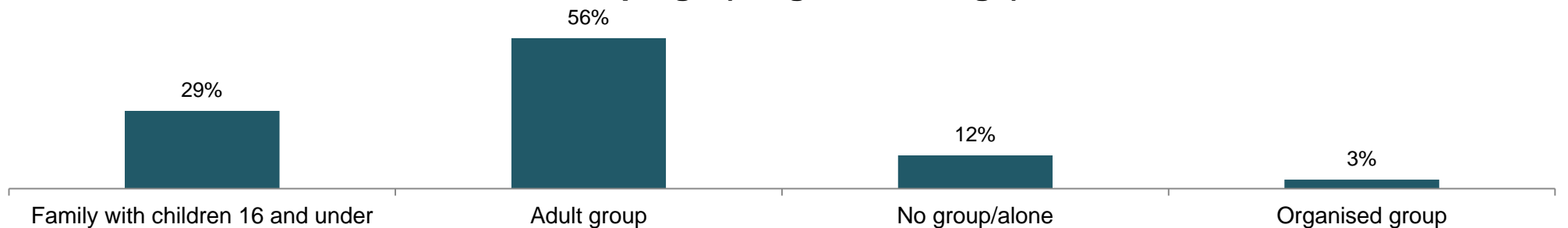


Figure 45: Group Age (weighted average)

Gender

Visitors were asked to select from three options for gender: 'Male'; 'Female'; or 'Other'. This question is particularly useful in situations where a cultural organisation has targeted an activity or event at a particular gender. The results of this should indicate whether the target audience has been reached.

In all but one case – Cockington Court – females made up more than 50% of visitors. On average, males make up 33% of visitors.

Average 61% female

Gender (by organisation)

Female Male Prefer not to say Other

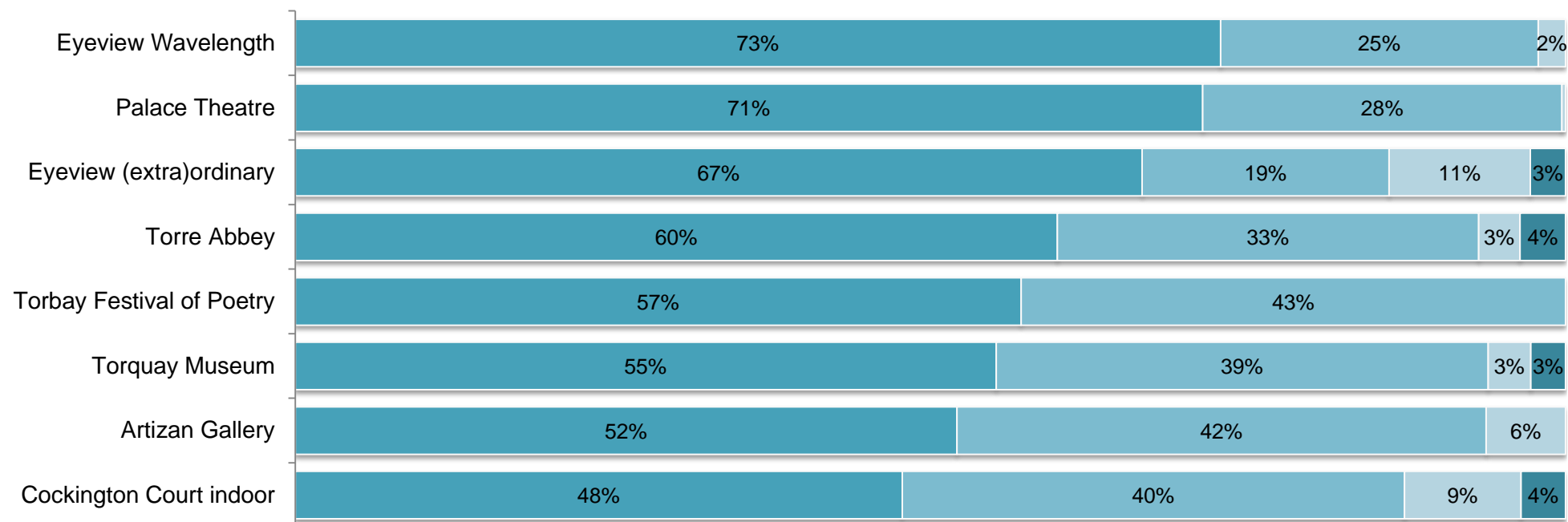


Figure 46: Gender (by organisation)

Gender (weighted average)

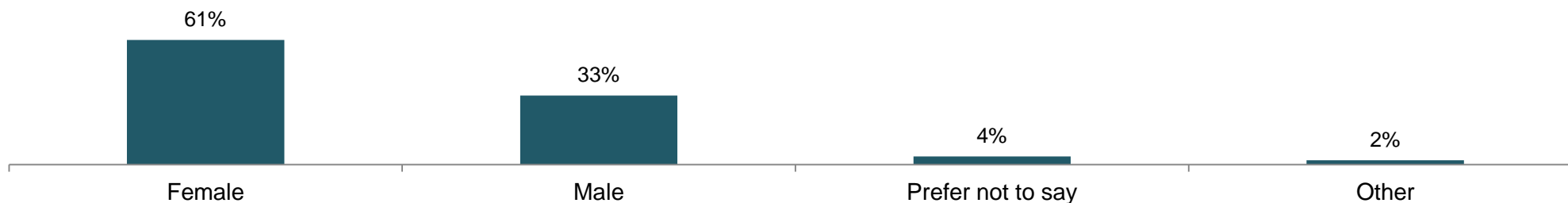


Figure 47: Gender (weighted average)

Disability

Visitors were asked the question 'Are your day-to-day activities limited because of a health problem or disability?', and were given three answer options: 'No'; 'Yes, limited a little'; and 'Yes, limited a lot'. This question is worded to match a corresponding question in the 2011 UK Census.

The 2011 UK Census showed that 24% of Torbay's population had a health problem or disability that limited their day-to-day activities either 'a little' or 'a lot'. This project's research shows that on average 15% of audiences have health problems or a disability that similarly limits their day-to-day activities. None of the participating organisations had results which showed their audience is representative of disability levels in the local Torbay population, all had results <24%.

This question was important for understanding the demographic make-up of audiences and to understand if an organisation is reaching a diverse audience as well as, whether or not it is accessible.

Average **15%** disability

Disability (by organisation)

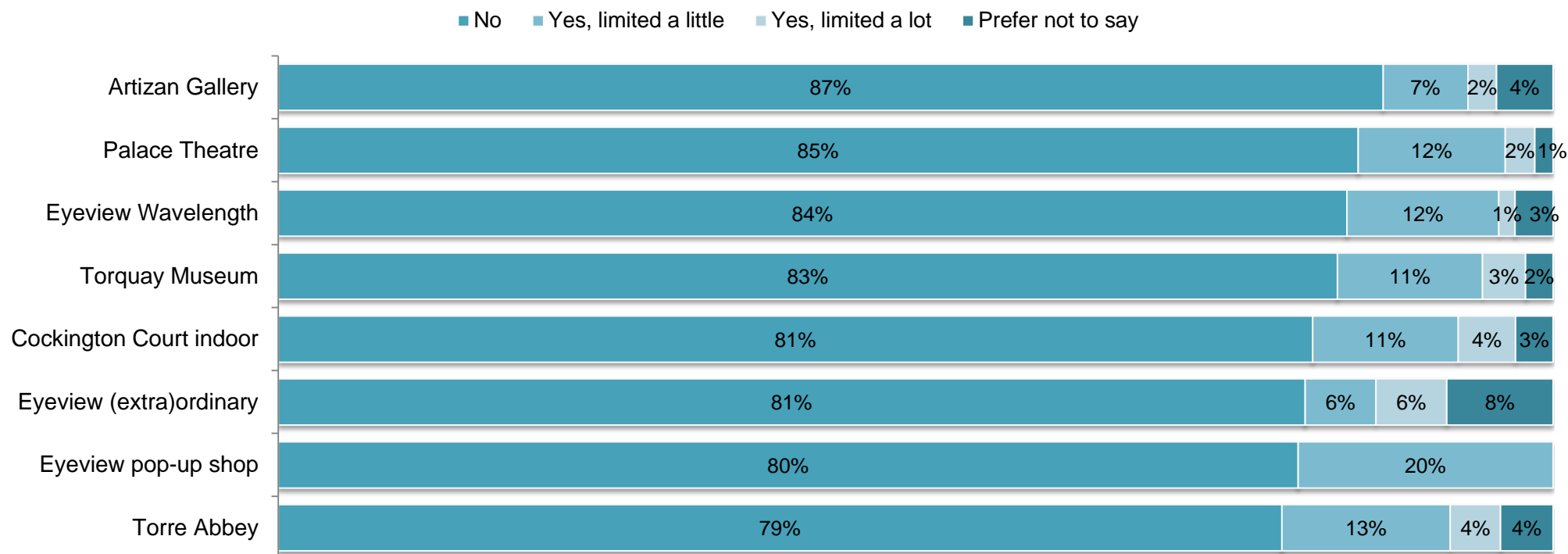


Figure 48: Disability (by organisation)

Disability (weighted average)

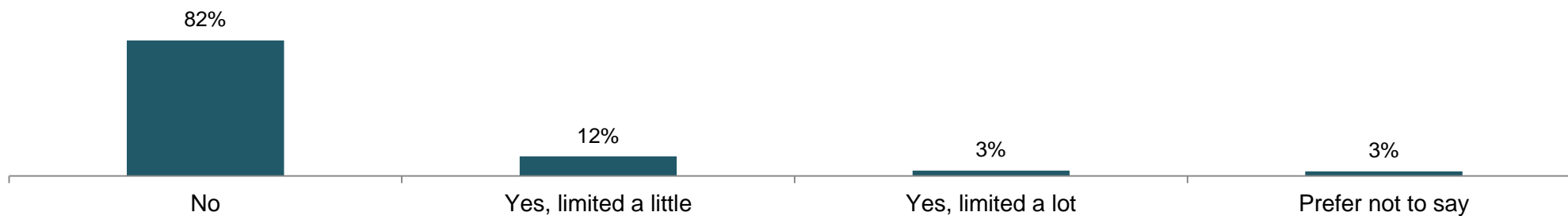


Figure 49: Disability (weighted average)

Ethnicity

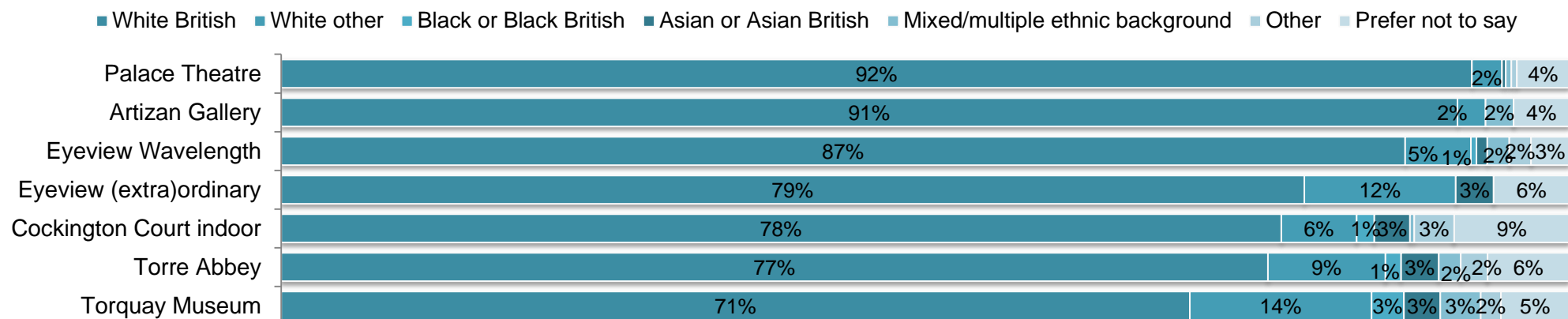
Visitors were asked what their ethnic group is and select from a series of options that correspond to the 2011 UK Census.

The 2011 UK Census showed the Black, Asian and Minority Ethnic (BAME) population in Torbay is 2.5%. Results from this project's data show that on average 4% of audiences are from a BAME background; this figure is calculated by adding together the categories of 'Black or Black British'; 'Asian or Asian British'; and 'Mixed/multiple ethnic background'.

Similar to questions on disability and health, this question was also important for understanding the demographic make-up of audiences and to understand if an organisation is reaching a diverse audience.

Average 4% BAME

Ethnicity (by organisation)



	Torquay Museum	Torre Abbey	Cockington Court indoor	Eyeview (extra)ordinary	Eyeview Wavelength	Artizan Gallery	Palace Theatre
White British	71%	77%	78%	79%	87%	91%	92%
White other	14%	9%	6%	12%	5%	2%	2%
Black or Black British	3%	1%	1%	0%	0%	0%	0%
Asian or Asian British	3%	3%	3%	3%	1%	0%	0%
Mixed/multiple ethnic background	3%	2%	0%	0%	2%	2%	0%
Other	2%	2%	3%	0%	2%	0%	0%
Prefer not to say	5%	6%	9%	6%	3%	4%	4%

Figure 50: Ethnicity (by organisation)

Ethnicity (weighted average)

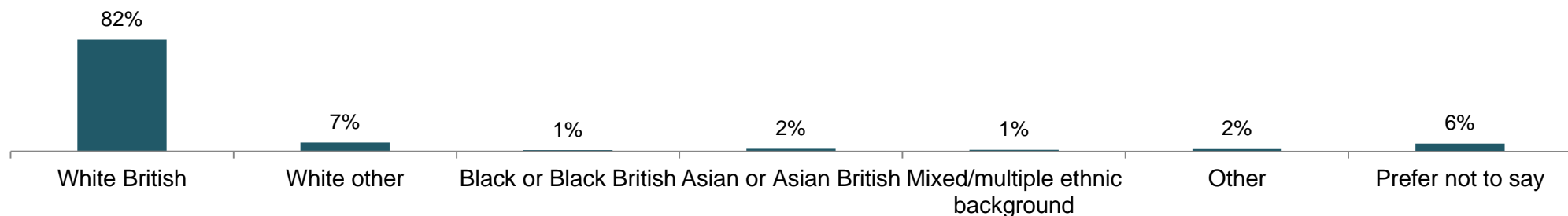


Figure 51: Ethnicity (weighted average)

Age

Visitors were asked which age category they fitted into. The aim of this question was to understand the age of the respondent answering the survey.

The most common age categories amongst visitors were 45 – 54 (16%), 55 – 64 (19%), and 65 – 74 (20%), and the least common were 16 – 24 (6%) and 85+ (2%). On average, under 16s made up 13% of visitors.

This question was also important for understanding the demographic make-up of audiences and to understand if an organisation is reaching a diverse audience. Additionally, it can help with developing marketing strategies as age is often a key determinant in the types of both marketing material and channels that audiences respond to.

Average 13% under 16s

55% aged 45-74

Age (by organisation)

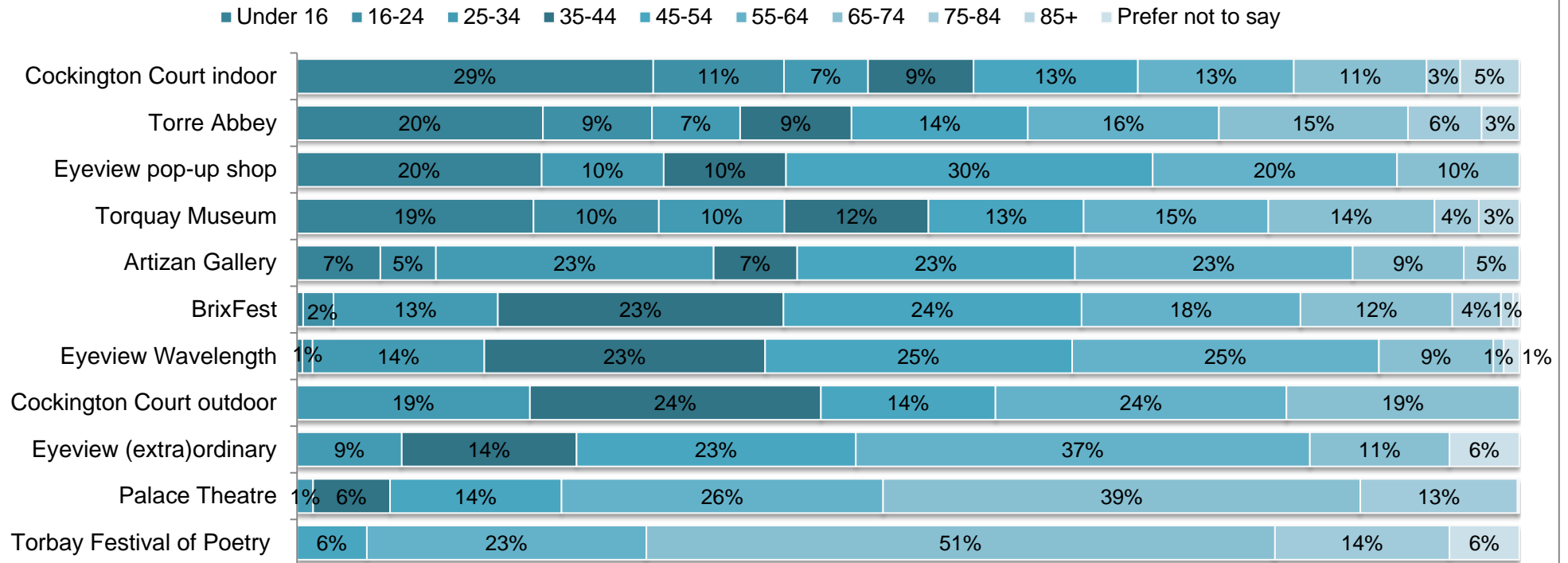


Figure 52: Age (by organisation)

Age (weighted average)

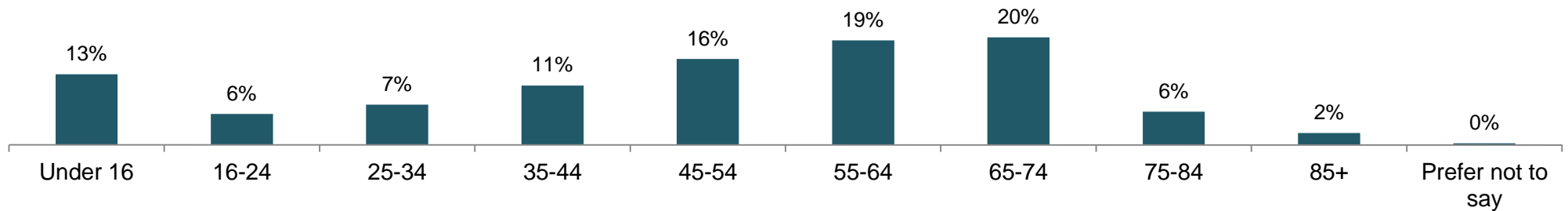


Figure 53: Age (weighted average)

Postcode and Segmentation (CACI Acorn)

Visitors were asked to provide their full UK home postcode. The aim of this question was two-fold: 1) to understand the geographic distribution of visitors; and 2) to use the postcodes to conduct socio-economic segmentation of visitors using the CACI Acorn Segmentation system.

Overall, 52% of the postcodes were from within the Torbay area (unitary authority). This corresponds well with the results to the Local and Tourist question (see Figure 43) which showed, on average, 58% of visitors were from within a 30 minute drive time of the area.

The postcode data is represented below in two forms. Firstly, Figure 54 is a heat map showing the distribution of visitors in Torbay and in the UK. The majority of visitors are from the southwest, concentrated around the Torbay area.

Secondly, Figure 55 - Figure 74 are graphs showing CACI Acorn visitor segmentation. Figure 55 shows the aggregation of all postcodes from all sites, which is compared to Figure 56 showing the aggregation of Torbay postcodes only, from all sites. This way of displaying the segmentation is repeated for each organisation, excluding Eyeview (extra)ordinary and Pop-up shop as the postcode data was all from within Torbay.

Average **40%** of local visitors from disadvantaged backgrounds

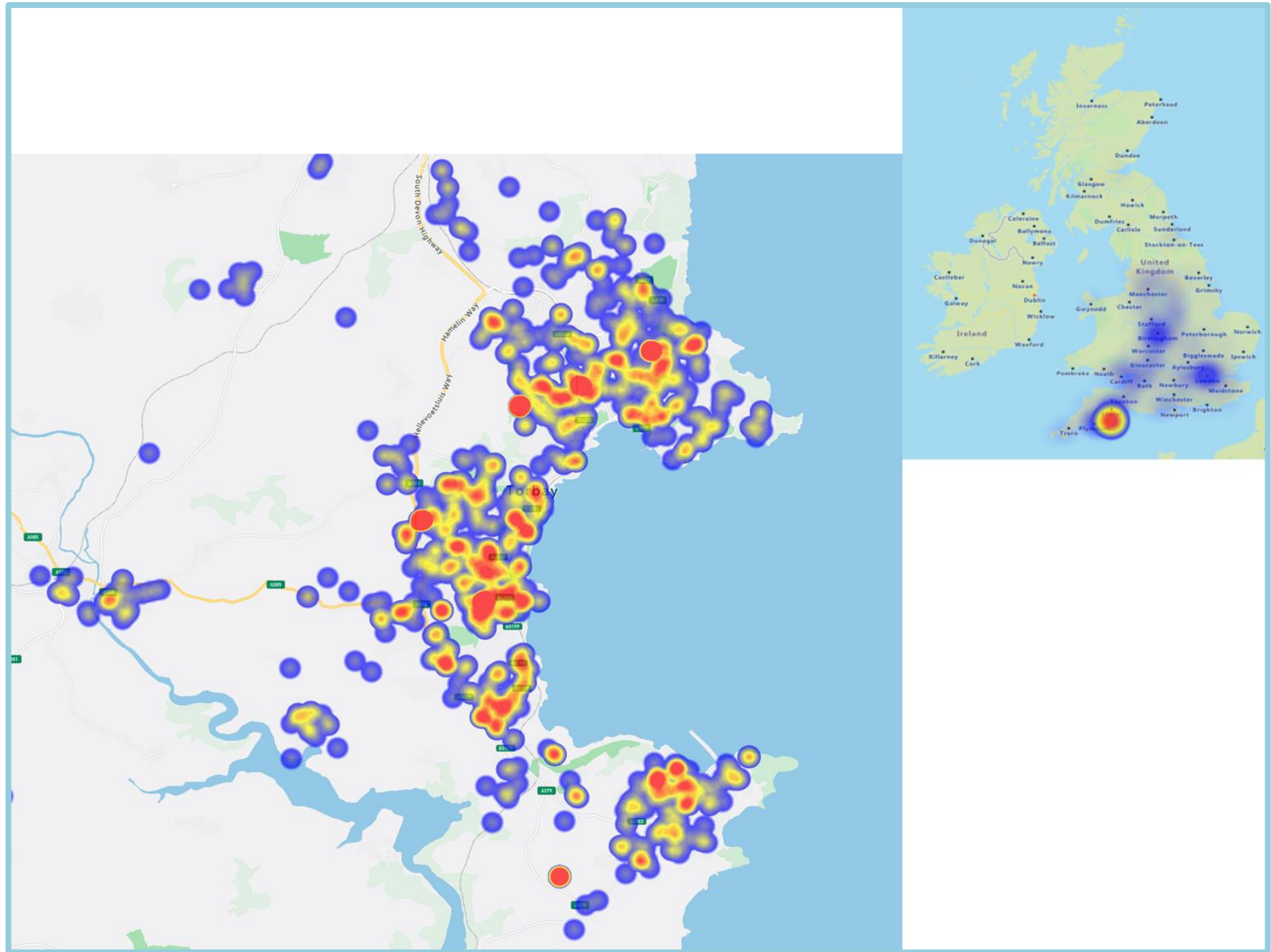
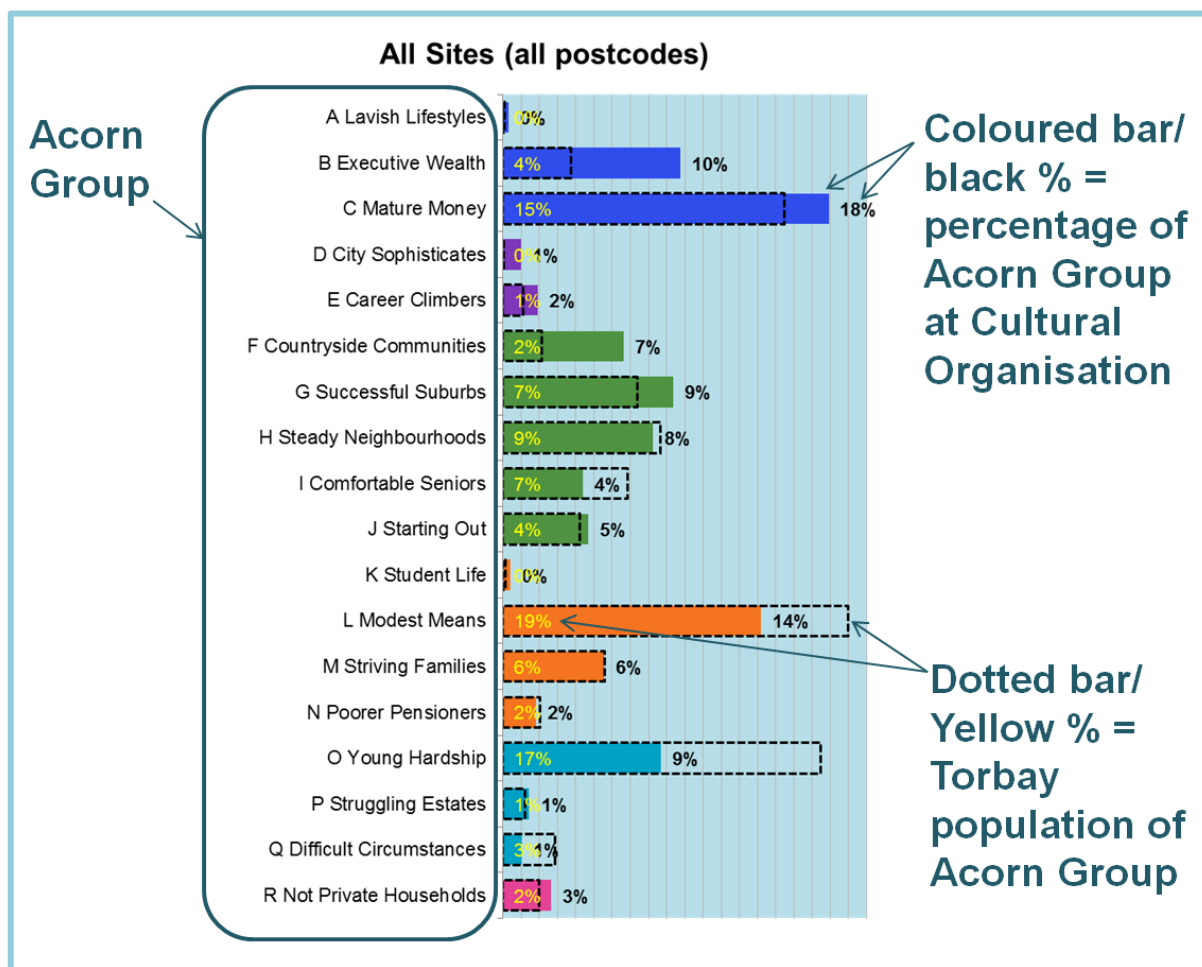


Figure 54: Heat map showing distribution of visitor postcodes in Torbay and the UK

Understanding CACI Acorn Segmentation

The following graphs show visitors to each cultural organisation segmented using CACI Acorn. Each graph contains the percentage of each Acorn Group in Torbay and at the corresponding cultural organisation. Overall, the Acorn groups can be understood as going from more privileged socio-economic groups in Group A - 'Lavish Lifestyles' - to less privileged in Group Q - 'Difficult Circumstances'. Where the coloured bar differs +/- from the dotted line this indicates that those Groups are either over or under-represented in cultural audiences compared to the local population. For further information about the CACI Acorn and the meaning of the different segments see the Acorn User Guide: <https://acorn.caci.co.uk/downloads/Acorn-User-guide.pdf> (All CACI Acorn graphs shall be used solely for non-commercial purposes © 1979 – 2019 CACI Limited).



All Sites (all postcodes)

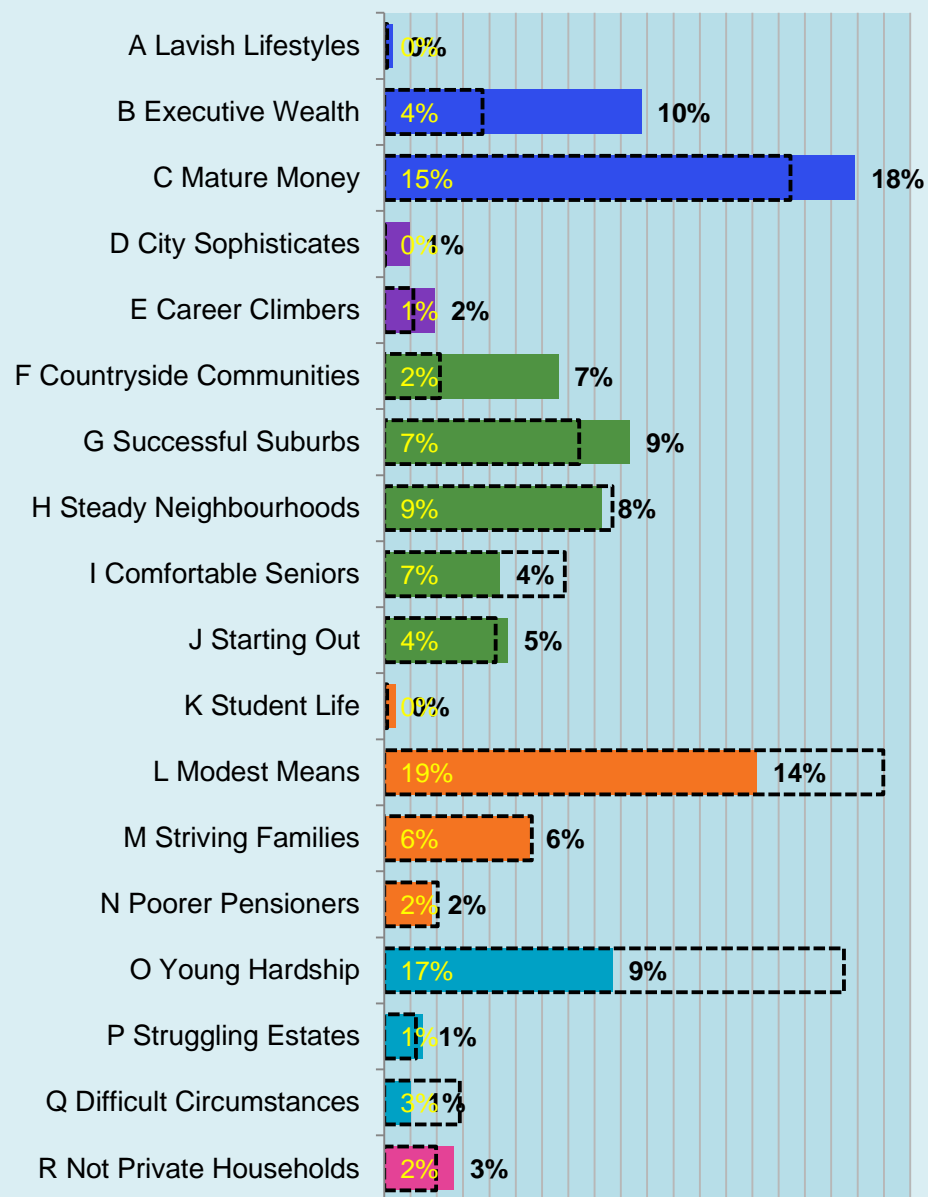


Figure 55: All Sites (all postcodes) Acorn Segmentation

All Sites (Torbay postcodes)

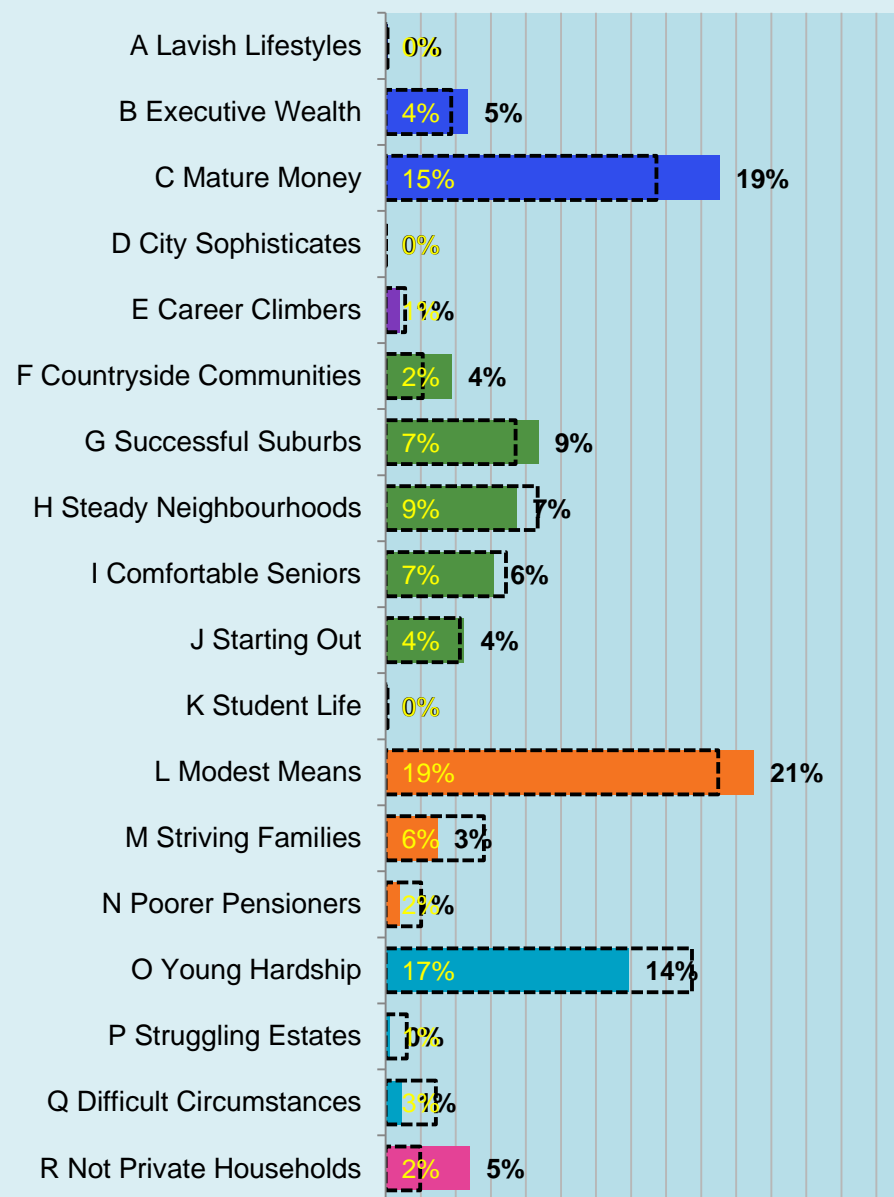


Figure 56: All Sites (Torbay postcodes) Acorn Segmentation

Artizan Gallery (all)

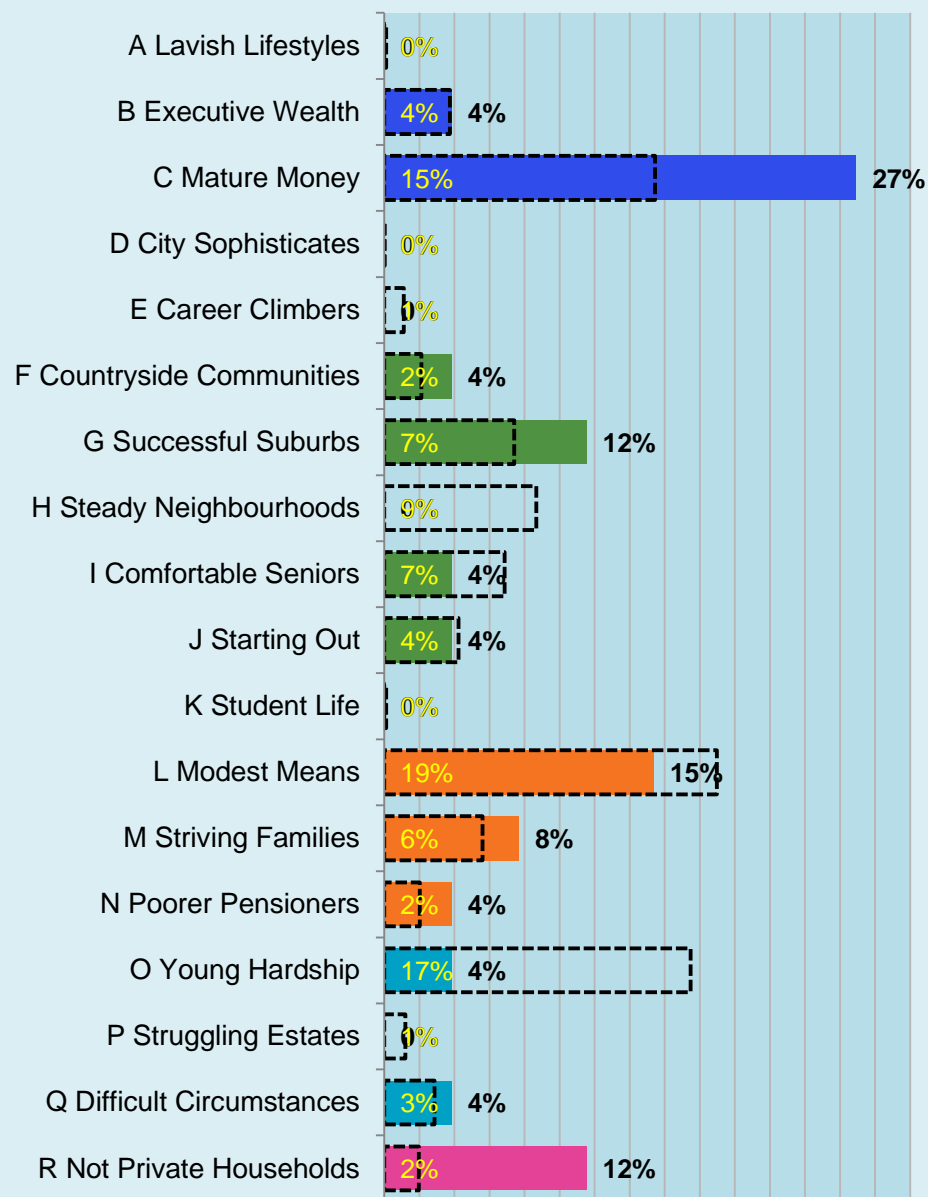


Figure 57: Artizan Gallery (all postcodes) Acorn Segmentation

Artizan Gallery (Torbay postcodes)

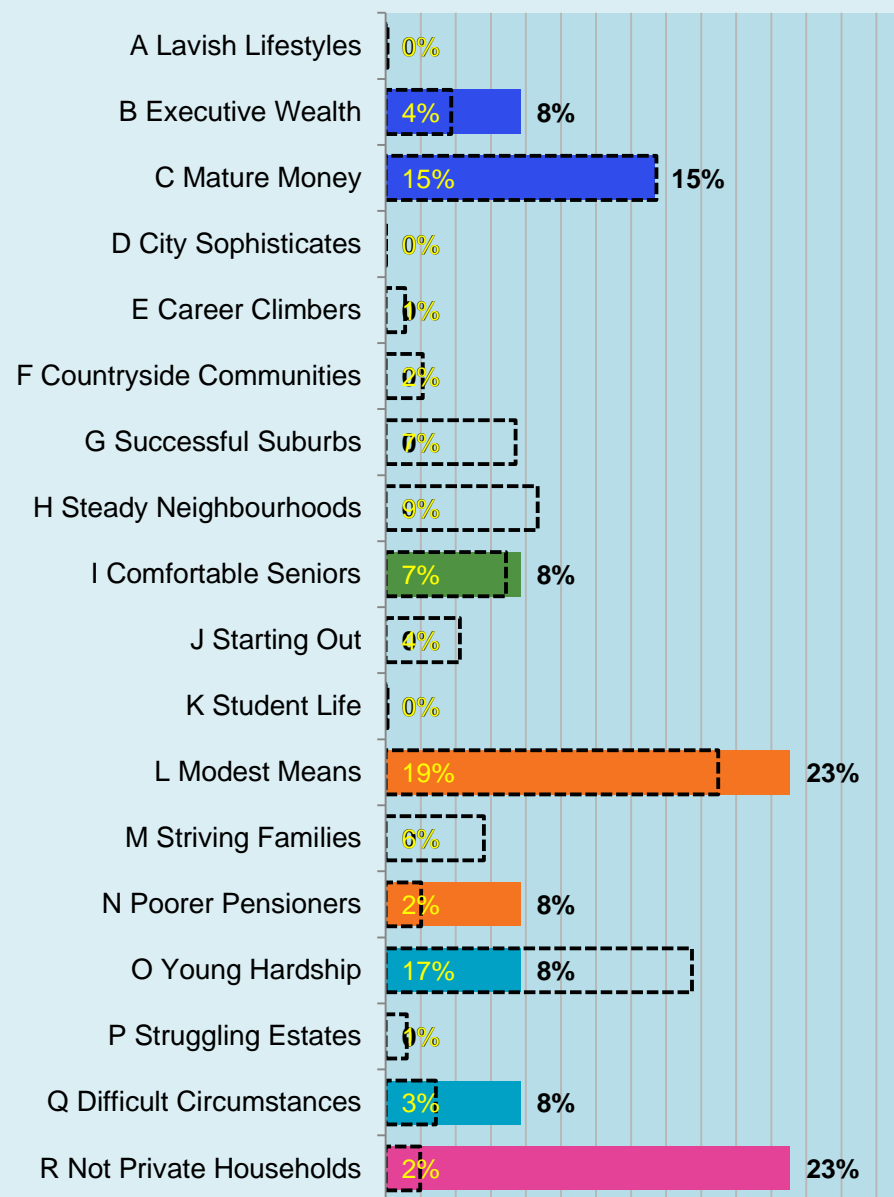


Figure 58: Artizan Gallery (Torbay postcodes) Acorn Segmentation

BrixFest (all)

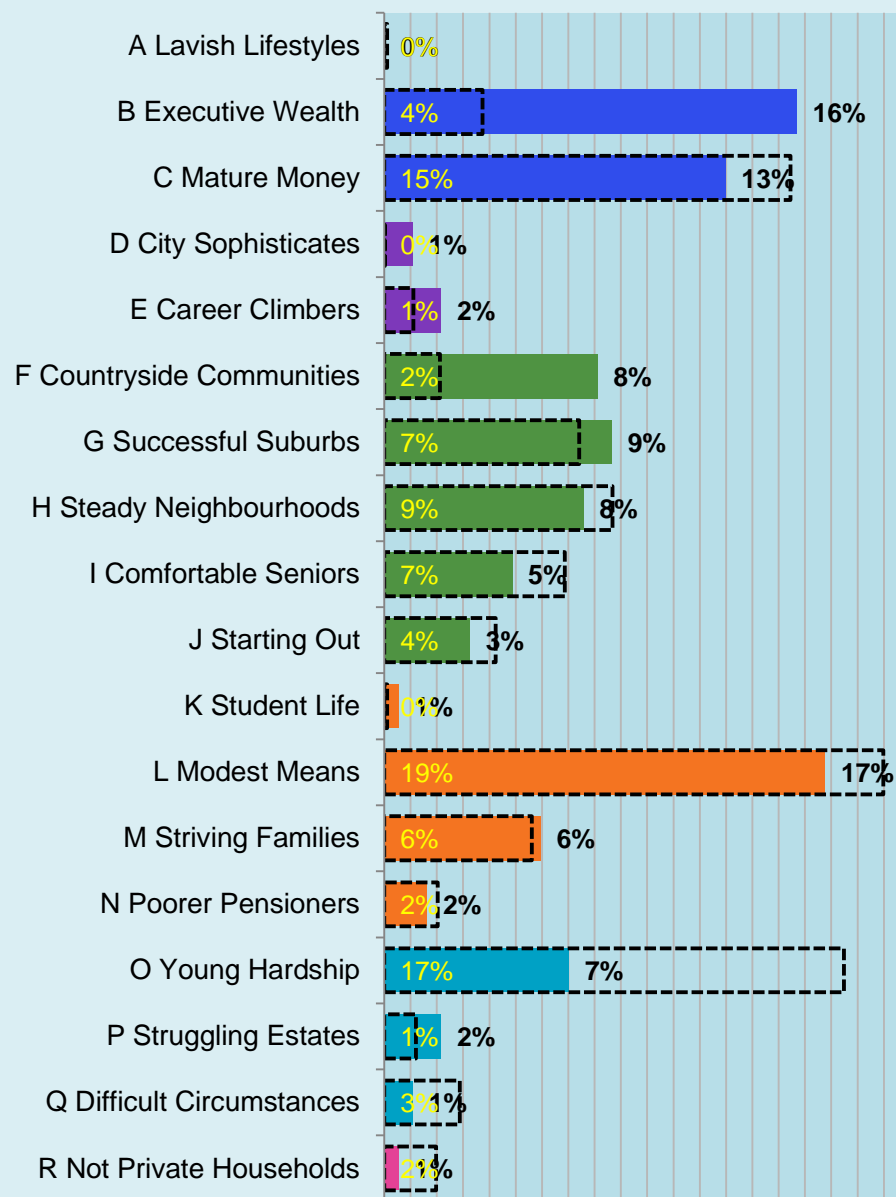


Figure 59: BrixFest (all postcodes) Acorn Segmentation

BrixFest (Torbay postcodes)

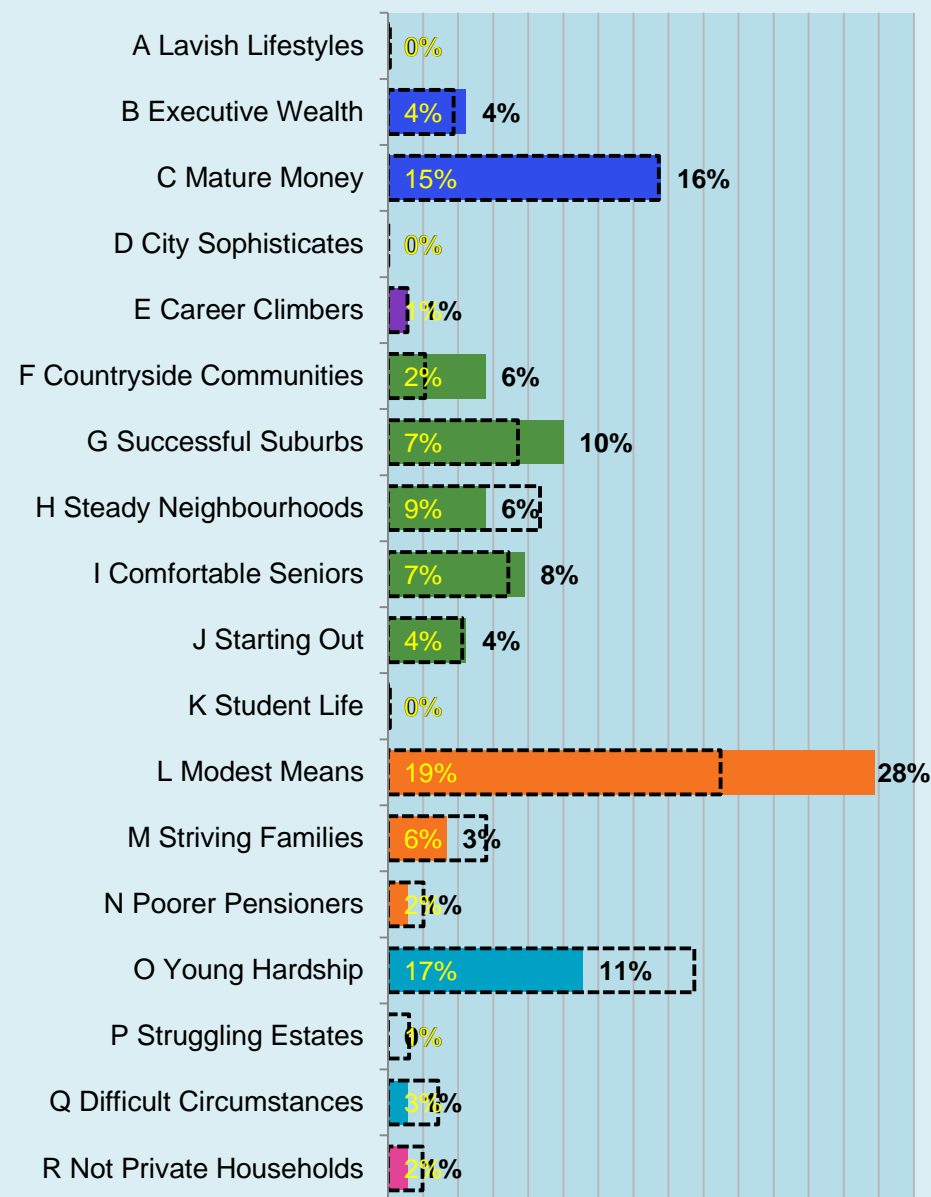


Figure 60: BrixFest (Torbay postcodes) Acorn Segmentation

Cockington Court (all)

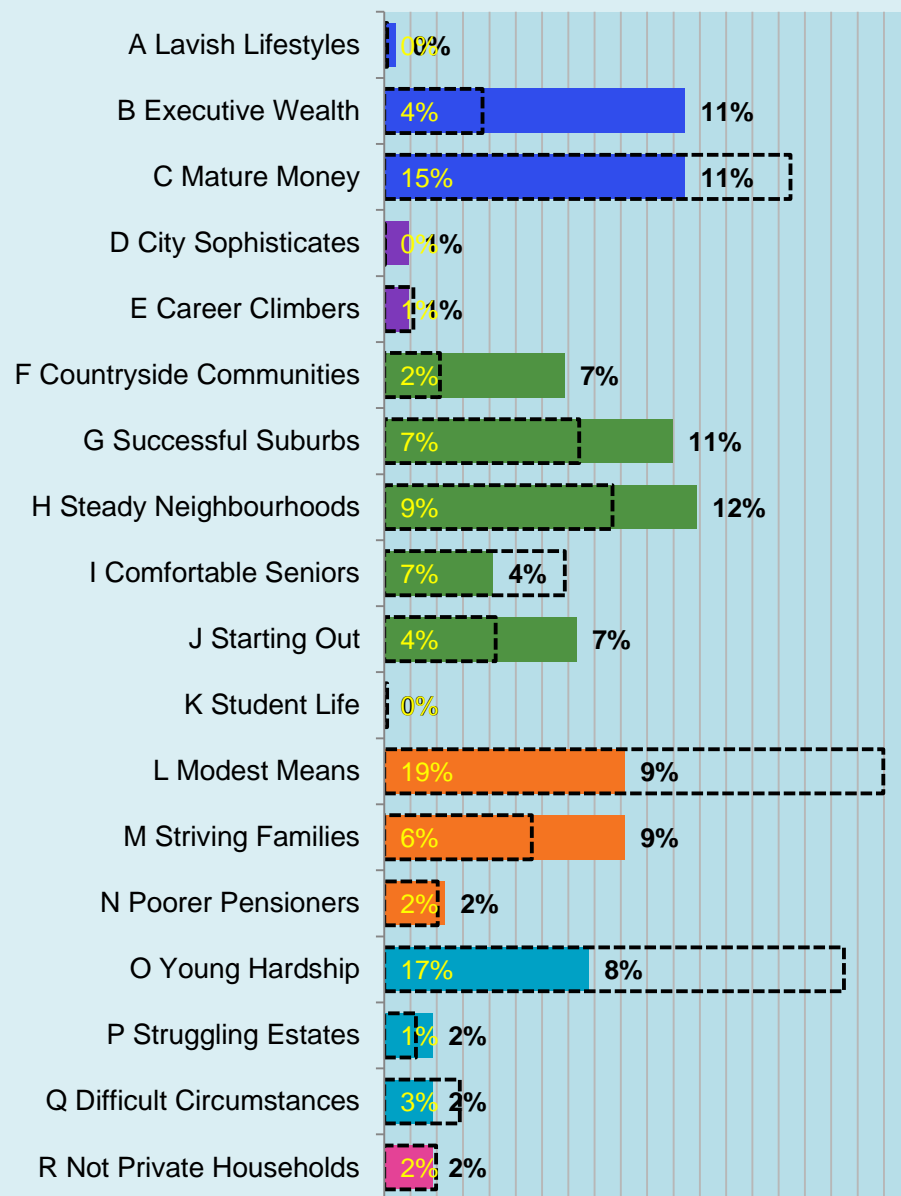


Figure 61: Cockington Court (all postcodes) Acorn Segmentation

Cockington Court (Torbay postcodes)

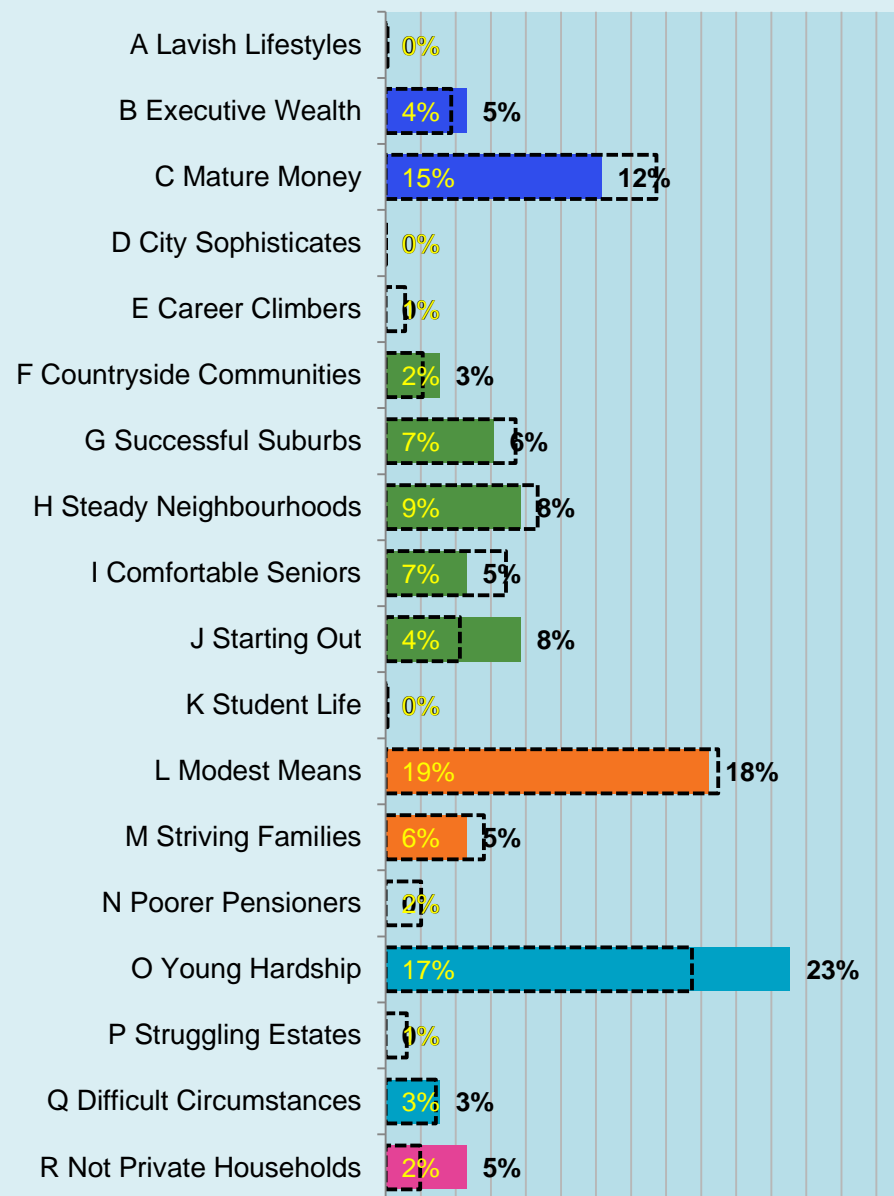


Figure 62: Cockington Court (Torbay postcodes) Acorn Segmentation

Eyeview (extra)ordinary (all)

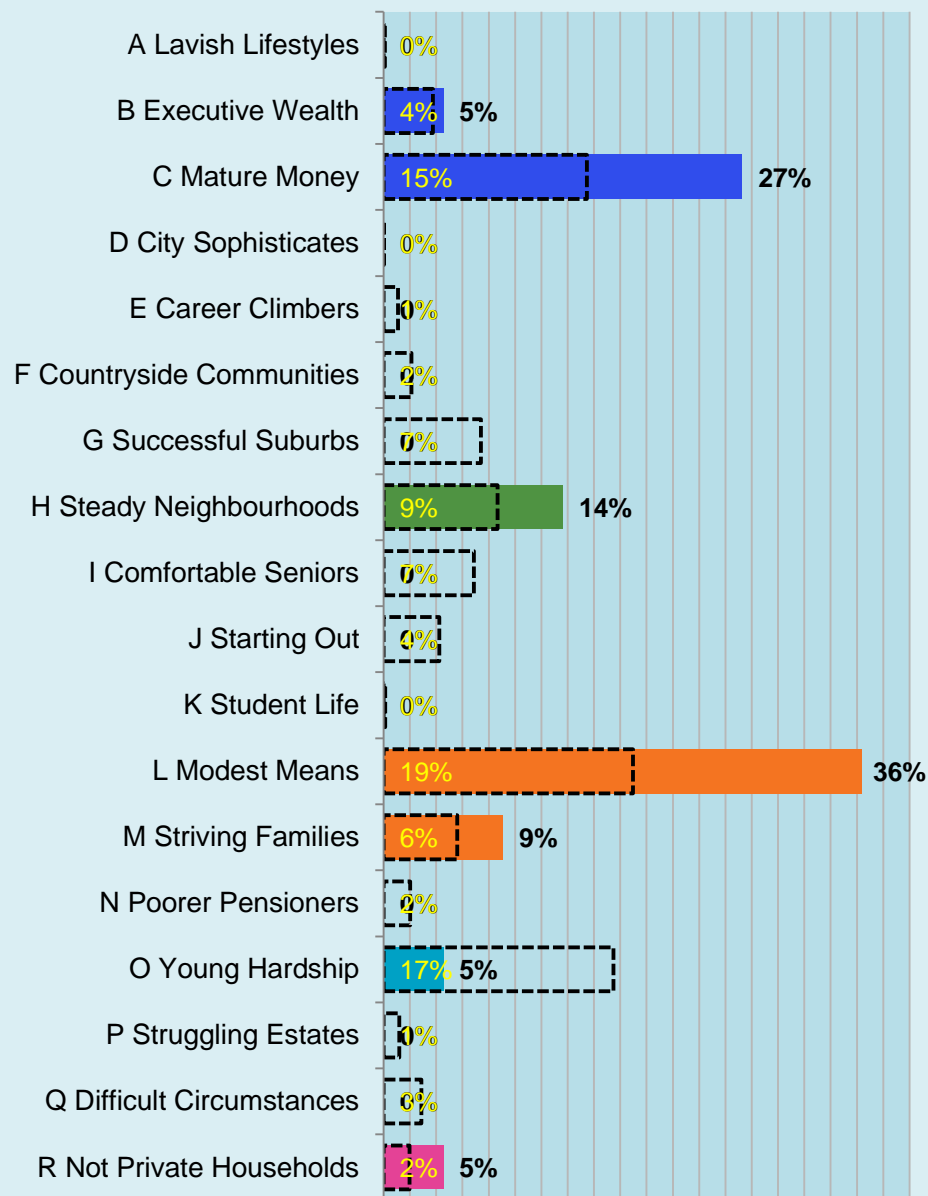


Figure 63: Eyeview (extra)Ordinary (all postcodes) Acorn Segmentation

Eyeview Pop-up Shop (all)

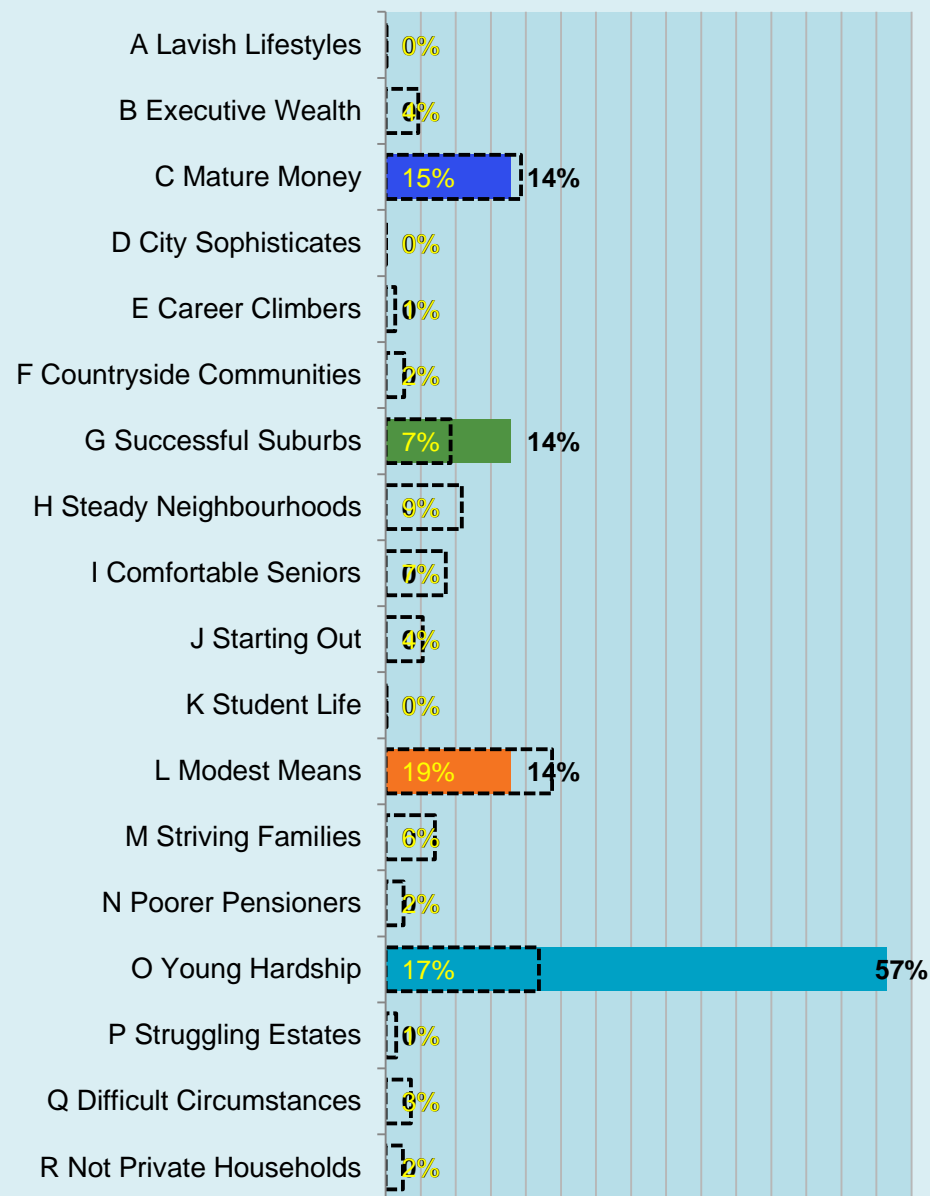


Figure 64: Eyeview Pop-up Shop (all postcodes) Acorn Segmentation

Eyeview Wavelength (all)

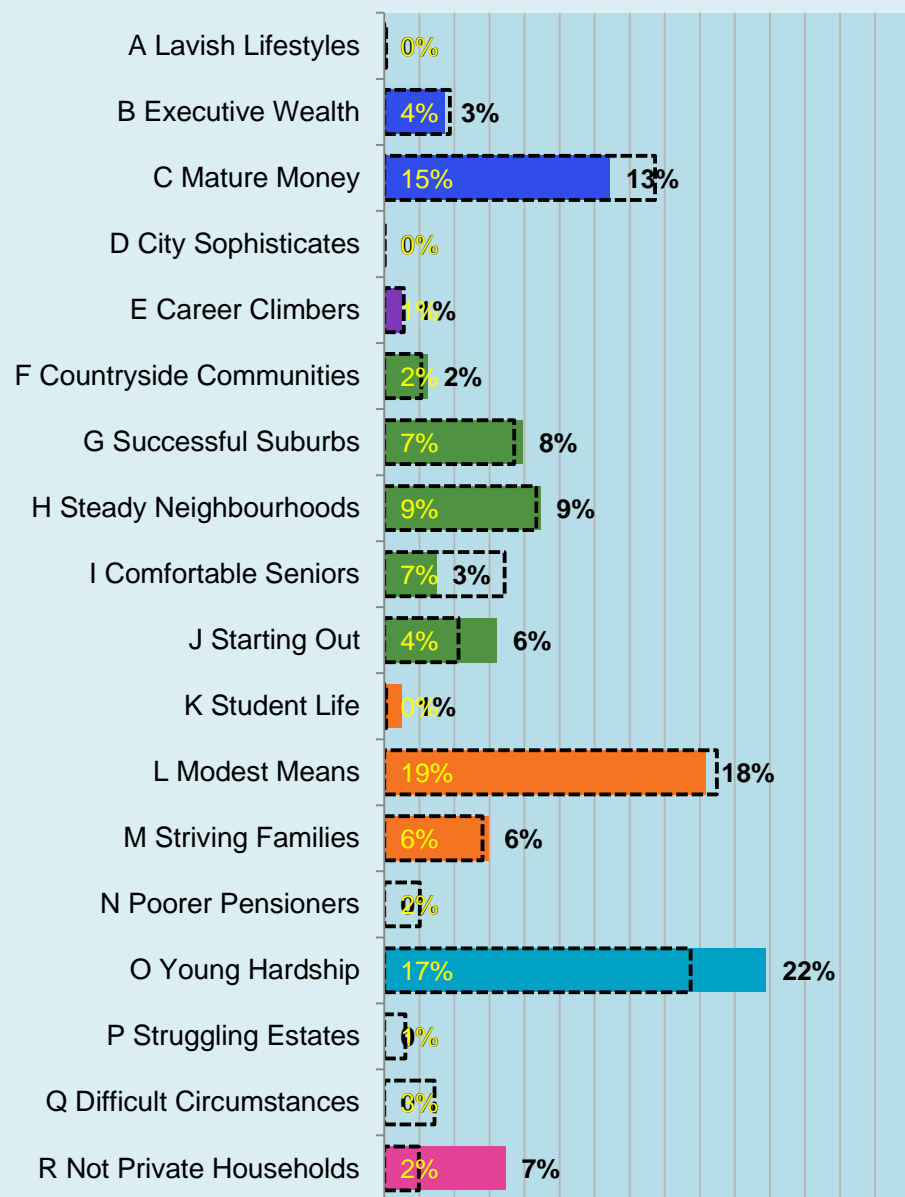


Figure 65: Eyeview Wavelength (all postcodes) Acorn Segmentation

Eyeview Wavelength (Torbay postcodes)

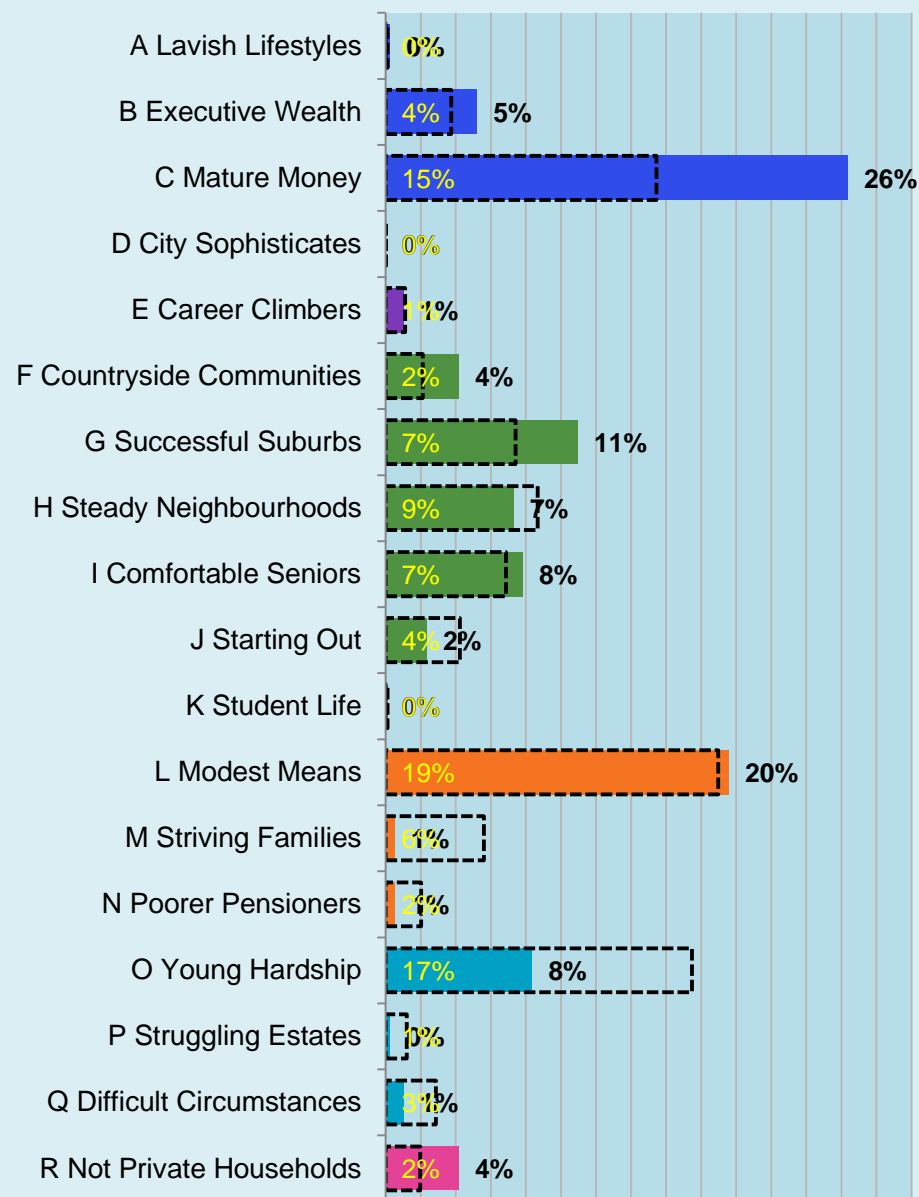


Figure 66: Eyeview Wavelength (Torbay postcodes) Acorn Segmentation

Palace Theatre (all)

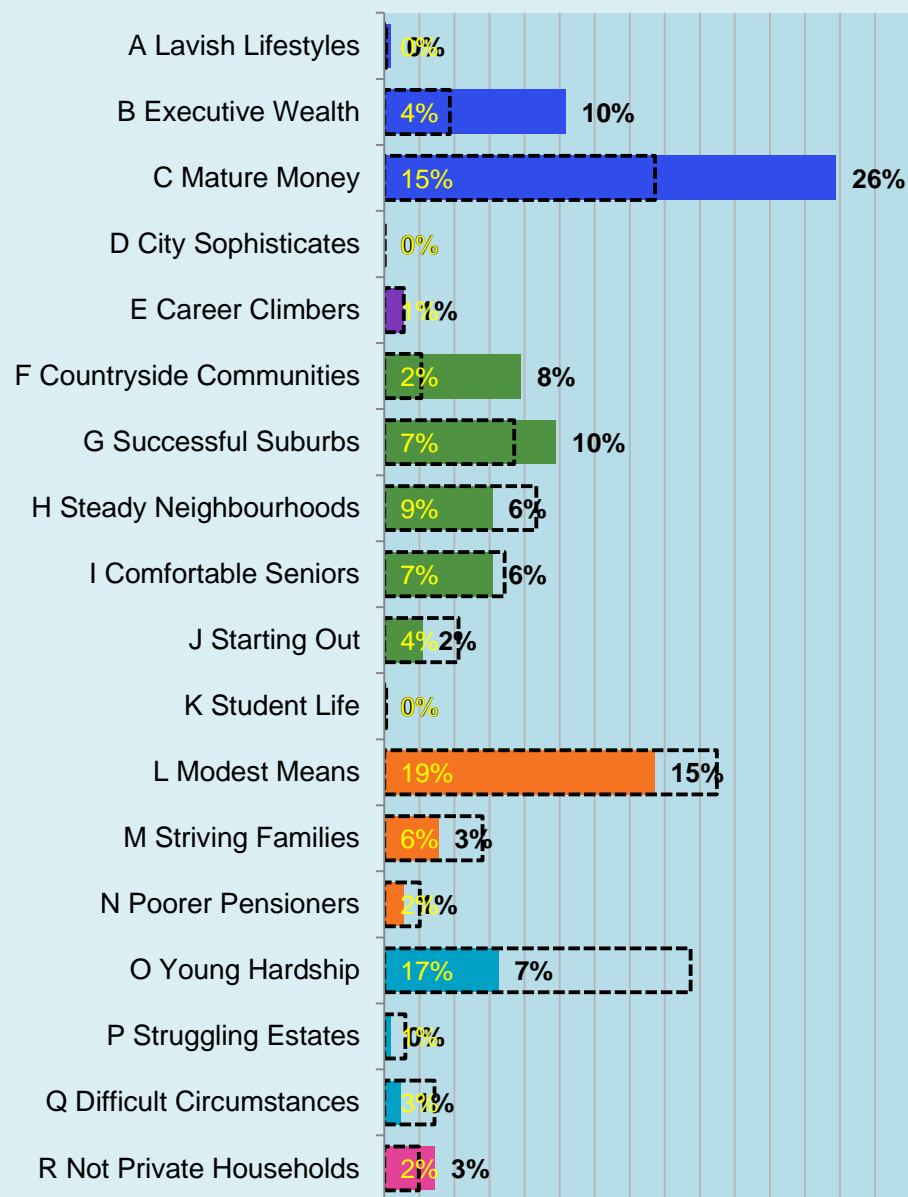


Figure 67: Palace Theatre (all postcodes) Acorn Segmentation

Palace Theatre (Torbay postcodes)

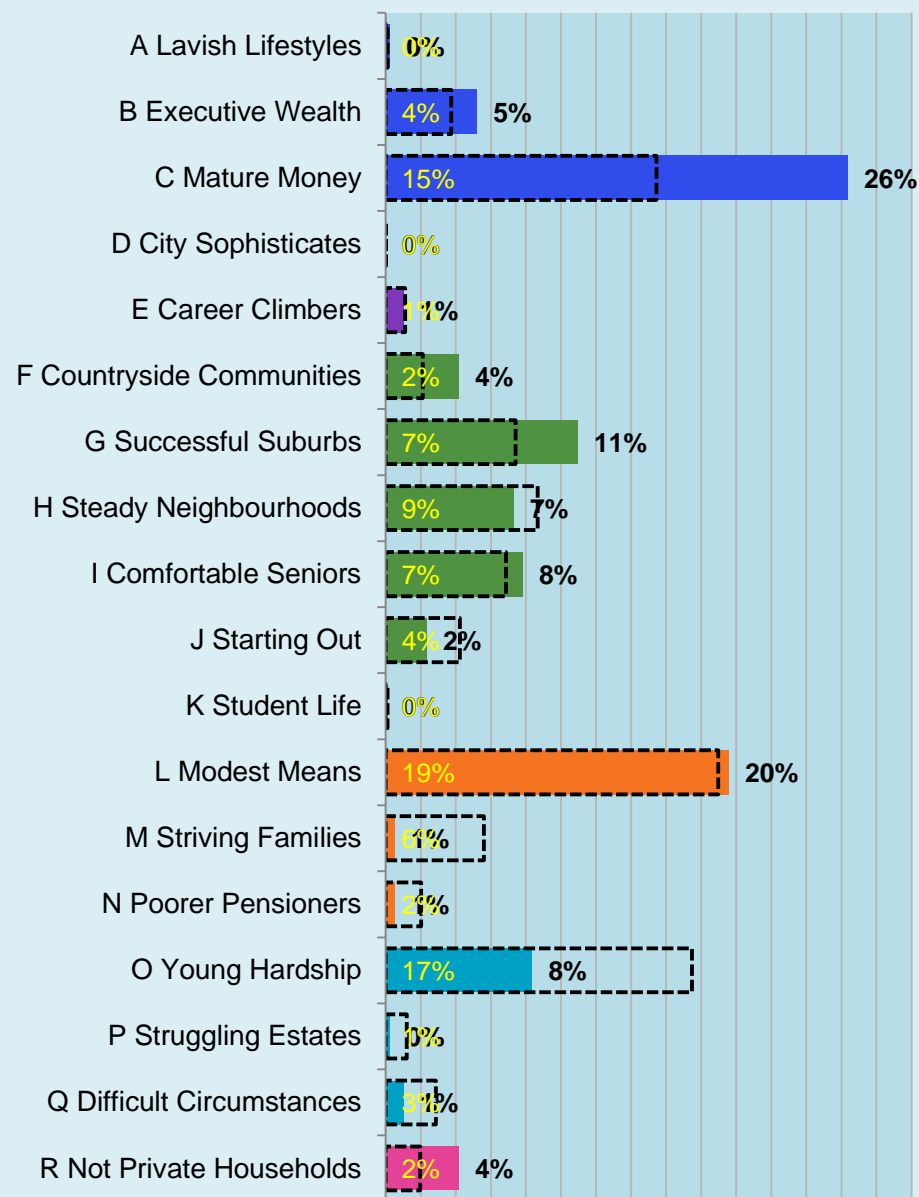


Figure 68: Palace Theatre (Torbay postcodes) Acorn Segmentation

Torbay Festival of Poetry (all)

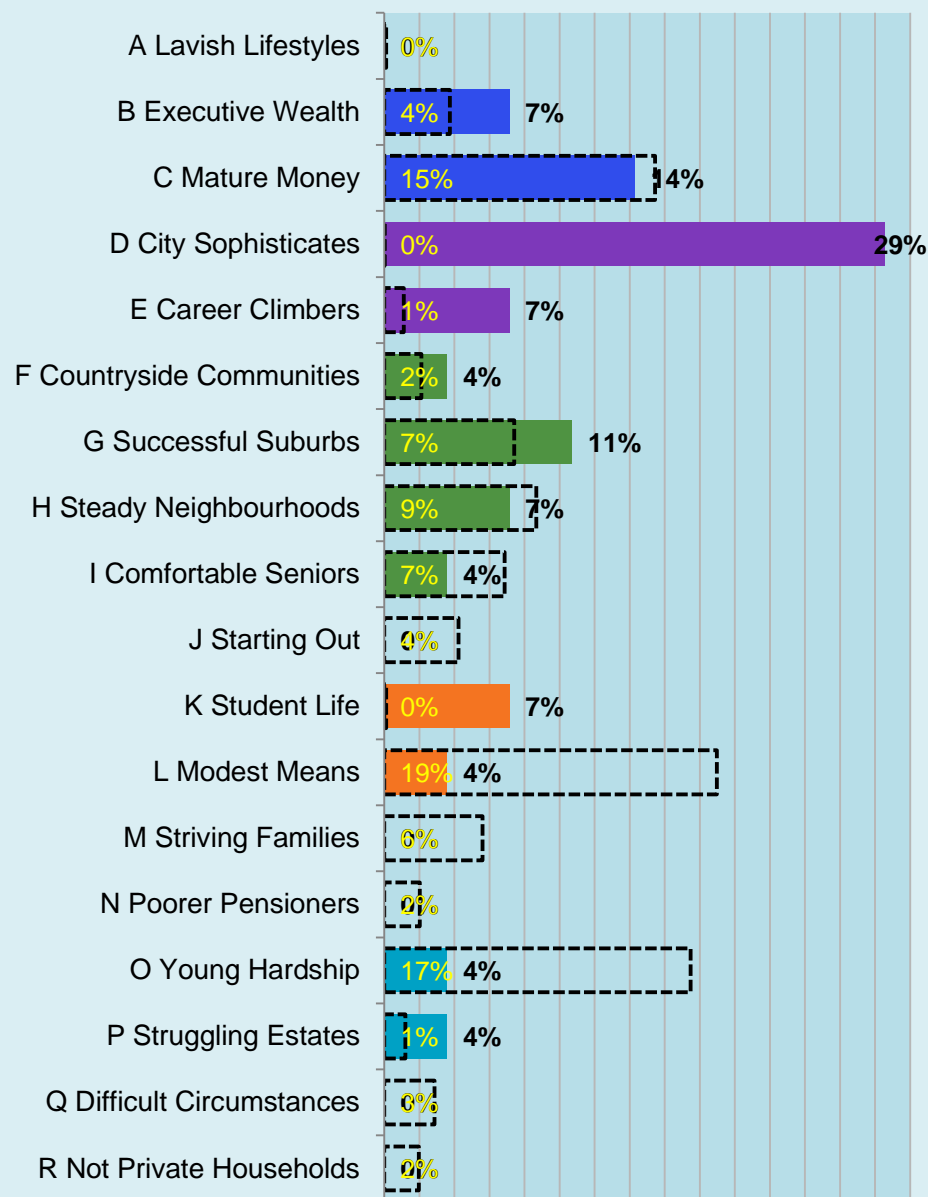


Figure 69: Torbay Festival of Poetry (all postcodes) Acorn Segmentation

Torbay Festival of Poetry (Torbay postcodes)

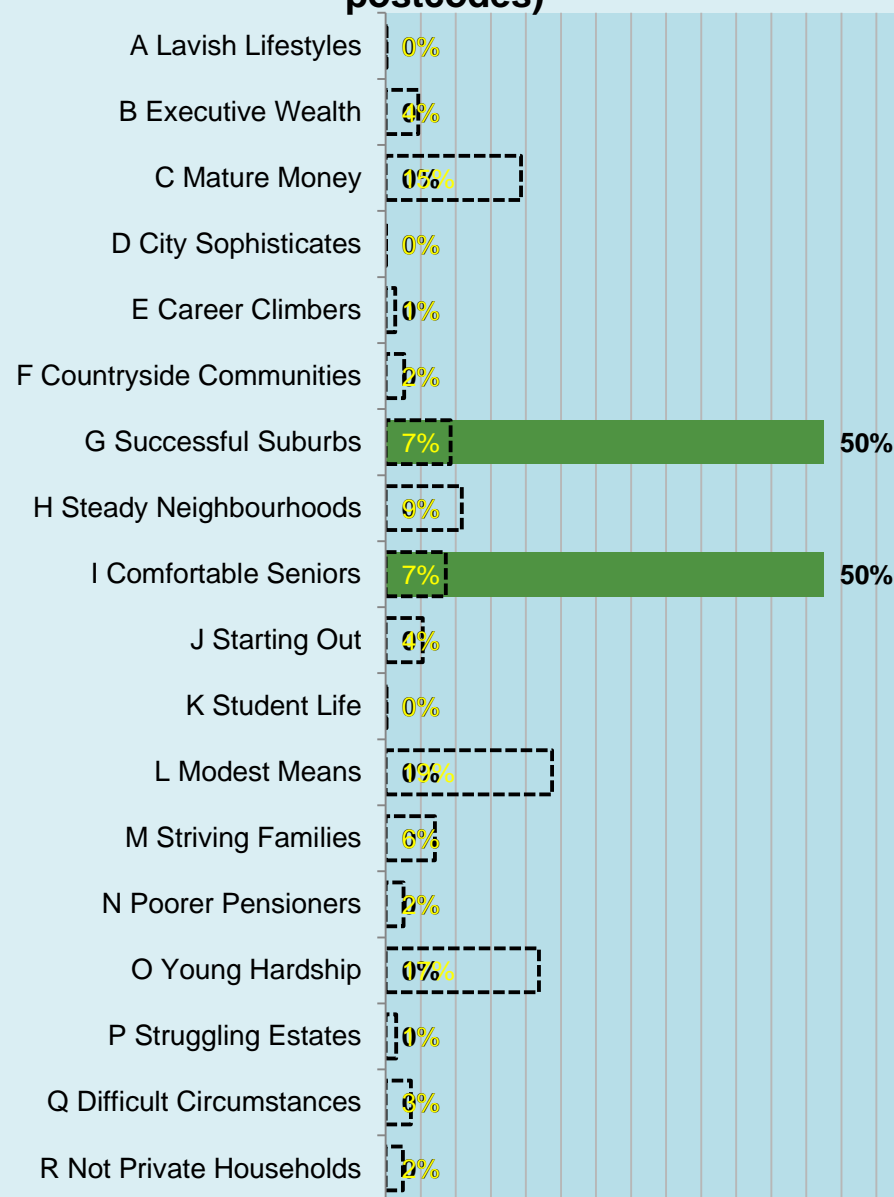


Figure 70: Torbay Festival of Poetry (Torbay postcodes) Acorn Segmentation

Torquay Museum (all)

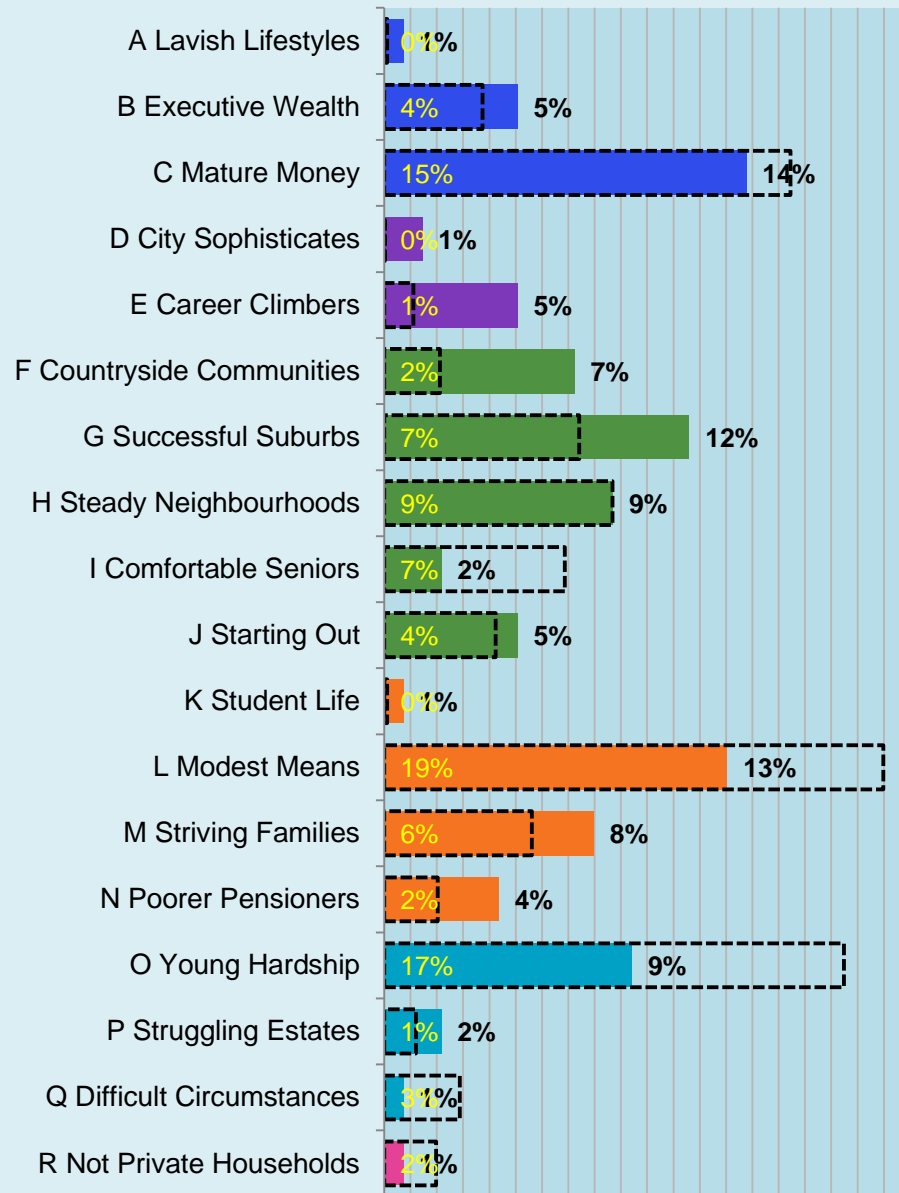


Figure 71: Torquay Museum (all postcodes) Acorn Segmentation

Torquay Museum (Torbay postcodes)

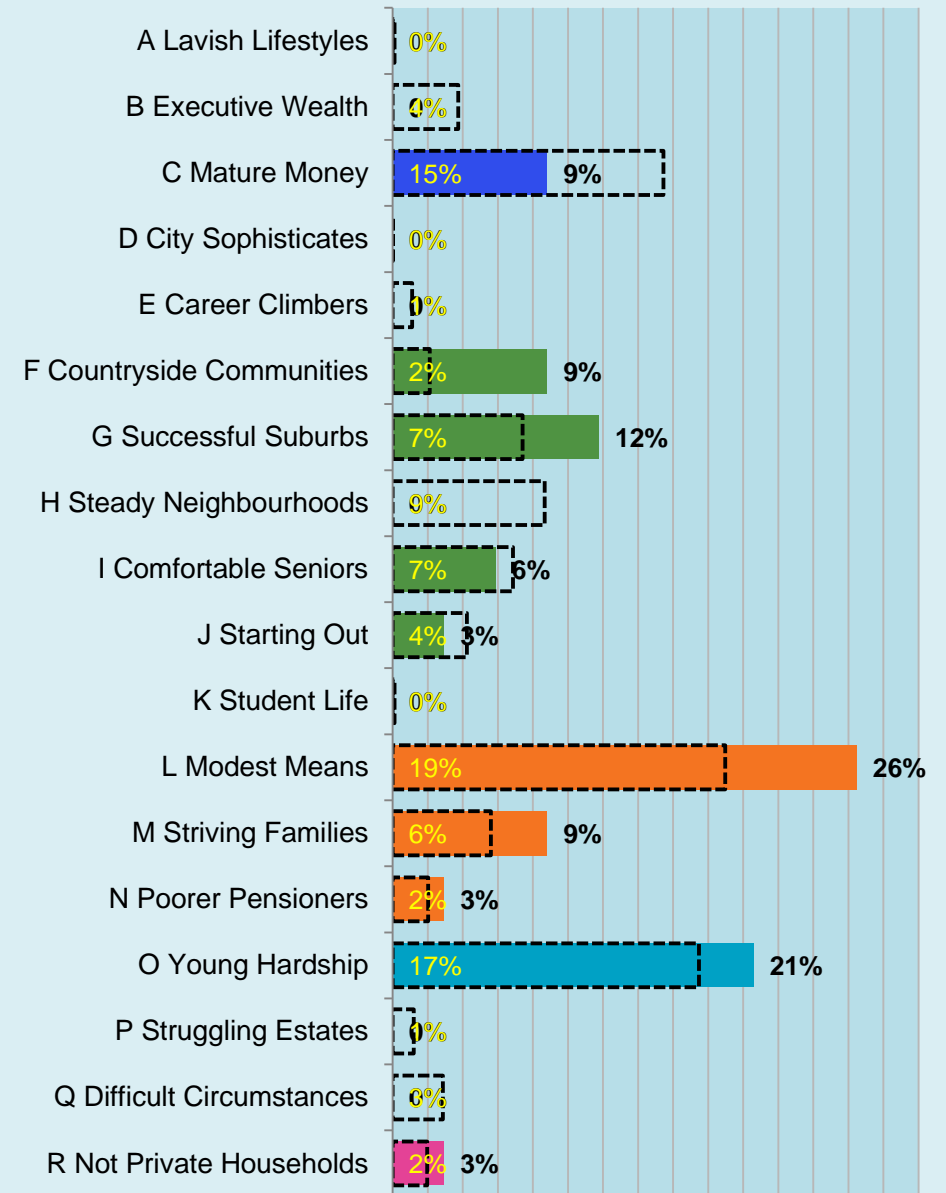


Figure 72: Torquay Museum (Torbay postcodes) Acorn Segmentation

Torre Abbey (all)

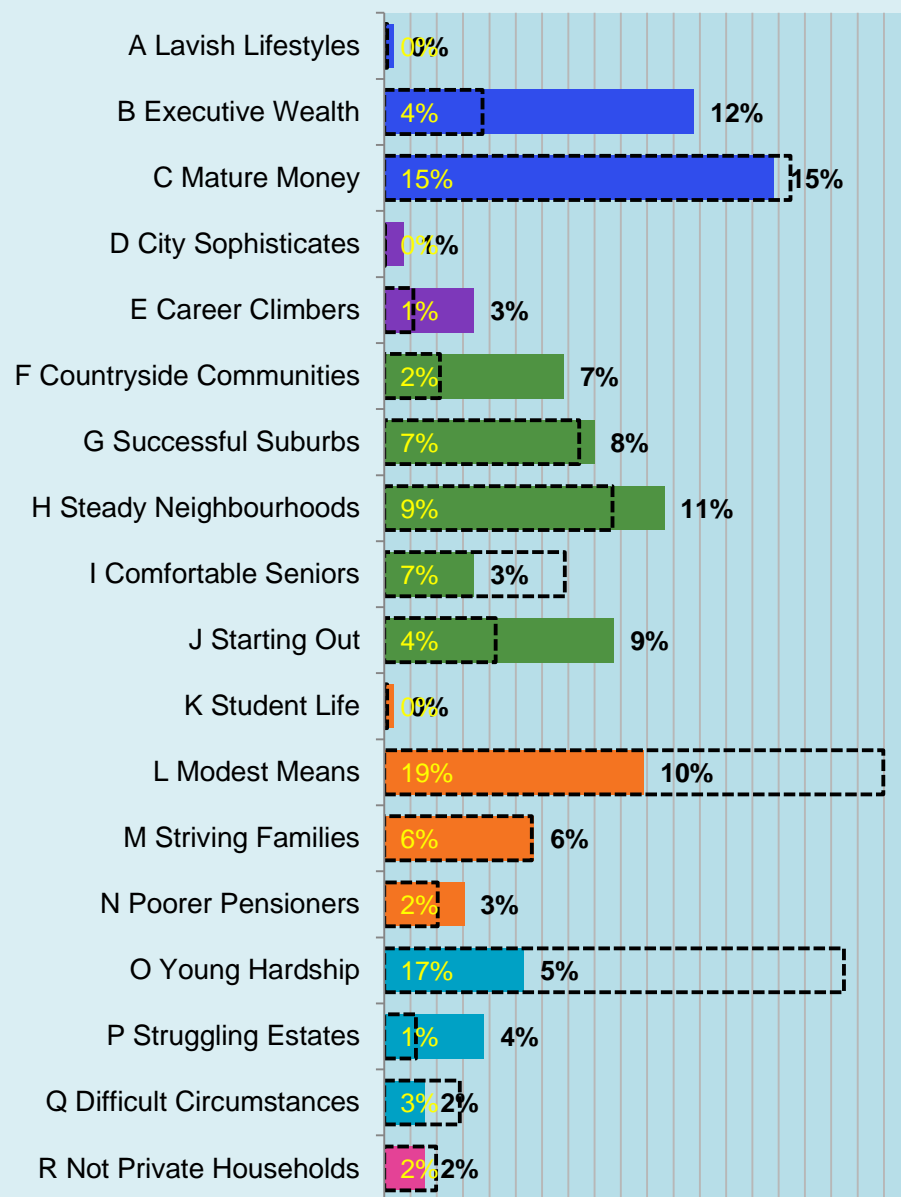


Figure 73: Torre Abbey (all postcodes) Acorn Segmentation

Torre Abbey (Torbay postcodes)

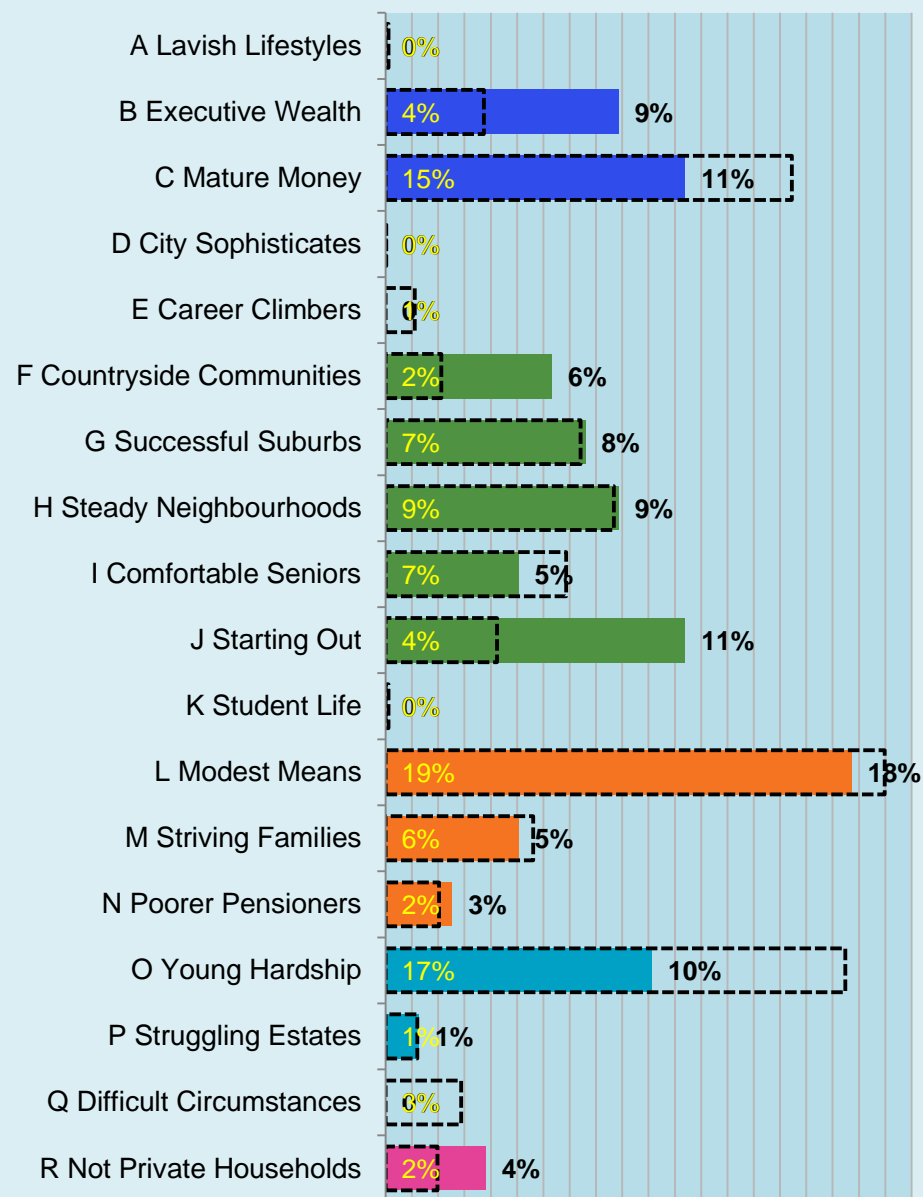


Figure 74: Torre Abbey (Torbay postcodes) Acorn Segmentation

Further Comments

Finally, visitors were asked if they had any further comments about their visit/experience. This question is useful for providing the visitor an opportunity to comment on aspects of their visit not covered in the rest of the survey.

The results are presented below in a word cloud and are an aggregate of all sites. The further comments from the individual cultural organisations' surveys will be available in the reports provided separately to each organisation.

Overall, further comments were very positive, with the most common words being 'Very', 'Good', and 'Love' – a positive response to the overall experience of cultural audiences at the varied organisations across Torbay.



Figure 75: All Sites 'Further Comments'

Recommendations

Ongoing audience evaluation is essential to support the development of organisational priorities, providing an evidence base for fundraising as well as helping to inform opportunities for collaborative working and partnerships, which provide greater impact and efficiencies to working alone. The continuation of audience evaluation at the organisations who participated in this project is essential for the future of audience development in Torbay. The successful legacy of current activity across Torbay requires a number of interdependent strands of activity:

- Sustained commitment by the current project organisations to audience data collection at both a strategic and operational level
- Maintaining an aligned core survey methodology to enable consistency in reporting and resulting insights across the organisations
- Transparency and clarity of this core survey methodology to enable additional survey activity to align (e.g. online surveys/feedback activity)
- A medium term (ideally a minimum of 3 years) commitment to the agreed standardised approach across participants to build confidence and longevity
- A mechanism for enabling collaboration across participant organisations; to enable ongoing review of the agreed methodology, support analysis and insights
- A coordinated approach to trouble shooting – e.g. IT kit issues, monitoring survey functionality – back end checks, survey feeds
- Central capacity/ budget allocation to process data through audience segmentation tools e.g. Acorn, Mosaic, Spectrum,
- Skills and capacity measures to ensure continued engagement in audience evaluation across the cohort and support new participants seeking to join
- A clear mechanism for engaging/recruitment to the cohort for future participants and support in the set-up of data collection methods and sampling

Organisations need to show commitment and be supported in the right way to achieve these objectives, in order to continue to embed the process of audience evaluation as an essential part of their operations for both individual and collaborative benefit. Whilst this will require investment, both human and financial, it provides a valuable opportunity for organisations to working in collaboration to benefit the collective sustainability of cultural provision across Torbay.

References and Resources

The local context;

<http://www.torbay.gov.uk/DemocraticServices/documents/s50293/JSNA%20Appendix%201.pdf>

<https://fingertips.phe.org.uk/static-reports/health-profiles/2019/e06000027.html?area-name=torbay>

<https://www.torbay.gov.uk/health-and-wellbeing/care-and-support-providers/mps/current-and-predicted-need/population-overview/>

<https://www.devonhealthandwellbeing.org.uk/jsna/overview/>

‘Torbay Summer of Data 2013’:

https://culturehive.co.uk/wp-content/uploads/2014/02/2258_events_reportWEB-3.pdf

English Riviera BiD ‘Visitor Survey 2016’:

<http://www.englishrivierabid.co.uk/english-riviera-visitor-survey-2016/>

‘The 99: Final Report 2018’:

https://www.torbayculture.org/s/1_Torbay-Culture_Final-Report_Nov_2018.pdf

The Audience Agency ‘Museums Audience Report 2018’:

<https://www.theaudienceagency.org/resources/museums-audience-report>

The Audience Agency ‘Outdoor Arts Audience Report 2018’:

<https://www.theaudienceagency.org/resources/audience-report-audiences-for-visual-arts>

The Audience Agency ‘Visual Arts Audience Report 2019’:

<https://www.theaudienceagency.org/resources/outdoor-arts-audience-report>



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