

TGI Audience Insight

Una Carmody
Arts Audiences



TARGET GROUP INDEX

PRESENTATION TO THEATRE FORUM CONFERENCE JUNE 18TH 2010

UNA CARMODY, DIRECTOR ARTS AUDIENCES

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Target Group Index

- What is the Target Group Index?
 - Carried out on behalf of Kantar Media UK Ltd
 - Single source survey each year since 1994
 - Two waves of compilation each year
 - » Oct-Dec and Jan- April

TARGET GROUP INDEX

- Data available is 08/09 data released in Sept 09
- 3,109 adults (over 15s)
- The survey intends to be representative of Republic of Ireland adults by geography and major demographics

Who uses it?

- Major advertisers
- Media planners
- Media outlets

What does it cover?

- Demographics
- Media information
- Brands (incl goods and services and leisure activities)
- Attitudes

What does it cover

Products

500+ categories



Brands



Demographics

Sex
Age
Marital Status
Education
Working status
Social Classification
Household Mix

Income
Religion
Home ownership
Counties & Regions
TGI Lifestage
TGI Life Events
Mosaic

Media

Above and below the line



Attitudes

264 attitudes

- "I read the financial pages of the newspaper"
- "Internet shopping makes life easier"
- "You can judge a person by the car they drive"
- "I look for profitable ways to invest my money"
- "I want to get to the very top in my career"

Understandings

- Leisure Activities
- Motivation to Purchase

Categories included in the survey

- Financial Services
- Holidays & Travel
- Shopping, Retail & Clothing
- Communications & Internet
- Food
- Household Products
- Pets & Pet Foods
- Pharmaceutical & Chemist Products
- Toiletries & Cosmetics
- Confectionery & Snacks
- Motoring
- Sports & Leisure
- Appliances & Other
- Household Durables
- Non Alcoholic Drinks
- DIY & Gardening
- Electronics & Other
- Personal Items
- Tobacco Products
- Alcoholic Drinks

EVERYTHING!



Sample report

- How does it work?
- Identify a target group
- Ask a question

Example : university graduates

Where do they do their main supermarket shop

Gives both the number (i.e how many grads shop at each chain) and the index
- the % likelihood that university grads will shop at a particular chain



Securing a sound evidence base

- What has this got to do with Arts Audiences and the Arts Council?
- TGI has been asking about arts attendance at certain categories of event since 1994
- Policy and strategy informed by robust audience information
- Two-year project begun to secure evidence at three levels
 - Impact of Arts Council funding – audience
 - Other publicly –funded activity
 - Other arts activity

Secure a sound evidence base

- Principles of project
 - Informed by previous information-gathering initiatives
 - Only information sought which will actually be used
 - Information sought at different levels depending on activity and funding
 - Support for those who do not collect or collate information

Target Group Index

- First step in the project to provide important information and a benchmark for future work
- Information has been purchased relating to 08/09 survey and 09/10
- 09/10 information will be made available in September 2010 and a new report published then
- First report on 08/09 just published and second wave will be published in late July

Audience insight

- Regional profiles of all arts attenders in document
- Can confirm what you know
- Where should I be spending my advertising and marketing money?
- What media outlets should I be targetting for PR or promotions?
- Can I design things better to maximise a return?

Categories

- Any performance in a theatre
 - Could be music, comedy, family, amateur
 - Plays
 - Opera
 - Ballet
 - Contemporary Dance

Target Group Index

- Sample sizes can be an issue in the arts
 - Opera and dance
 - Regionally
 - Where there are lots of options e.g radio
 - Sometimes gathering groups together is the only way to run reliable reports

In Ireland

- 3.5 million adults
- 28% live in Dublin
- 26% live in the rest of Leinster
- 28% live in Munster
- 18% Connacht /Ulster
- Arts Attenders are
 - 46% male compared 49.4% in gen pop
 - 54% female compared to 50.6% in gen pop



Media Consumption of Arts Attendees

Choices 3 - Coding - [C:\Program Files\Choices3\Specs\Theatre segmentation.SPC]

File Edit Search View Coding Tools Survey Help

kmr software

LEISURE CENTRES/HEALTH CLUBS/GYMS
HOBBIES & INTERESTS
LOTTO
TAKE-AWAY FOOD
FAST FOOD RESTAURANTS
COFFEE SHOPS AND SANDWICH BARS
NIGHT CLUBS AND OTHER LICENCED CLUBS
PUBS & BARS
RESTAURANTS (IN THE DAY/EVENING)
MAIN MEAL
BOOKS & AUDIO BOOKS
MAGAZINES BY SUBSCRIPTION
PARTWORKS
THEATRE, CONCERTS, ART EXHIBITIONS AND CULTURAL EVENTS
Frequency
Theatre
Plays
Opera
Ballet
Contemporary Dance Performances
Classical Music Concerts or Recitals
Folk Concerts
Jazz Concerts or Performances
Popular/Rock Concerts
Art Galleries or Art Exhibitions
Conferences & Cultural Events
Recency
Watch/Read About
D.I.Y. AND GARDENING
CONFECTIONERY AND SNACKS
TOBACCO PRODUCTS
NON ALCOHOLIC DRINKS
ALCOHOLIC DRINKS
MOTORING
HOLIDAYS & TRAVEL
FINANCIAL SERVICES
APPLIANCES & OTHER HOUSEHOLD DURABLES

Answer	Changes	Sam...	Weighted
Total		3109	3,532
Once A Month Or More		82	92
Once Every 2-3 Months		139	147
2-3 Times A Year		418	460
Once a Year		407	448
Less Often		487	550
Never Go		1576	1,836

Columns/Targets [1]

Columns	Sample	Weighted
All Arts Attendees (Theatre, Plays, Opera, Ballet, Dance)		

Rows/Media [0]

Rows

Theatre

Questions Net Press Alpha Definitions

Cols/Rows Filter Scratch Recycle

Description

Factor

www.kmrsoftware.com

Modified ROI TGI 2009 - Pop

Headline numbers

Artform	Once a year or more often	Less often than once a year
Any performance in a theatre	1,146,100	1696,000
Plays	983,600	1,615,000
Opera	154,700	395,900
Ballet	96,800	297,300
Contemporary Dance	164,830	408,900



Any performance in a theatre

Frequency	Number nationally
Once a month	92,000
Once every 2-3 months	147,000
2-3 times a year	460,000
Once a year	448,000
Less often	550,000

Plays

Frequency	Number nationally
Once a month	47,000
Once every 2-3 months	122,000
2-3 times a year	392,000
Once a year	423,000
Less often	632,000

Any performance in a theatre – national and regional radio listeners

	Number listened yesterday	% more likely to listen than general pop
National station	1,107,000	16%
Regional station	814,000	-1%

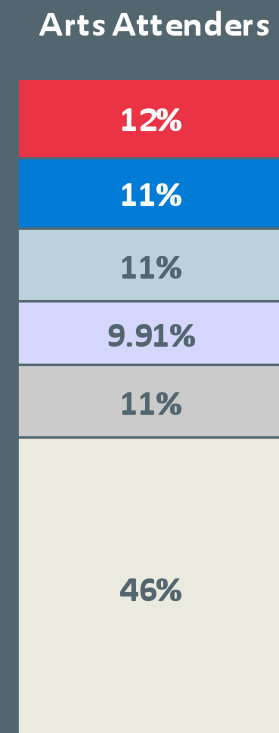
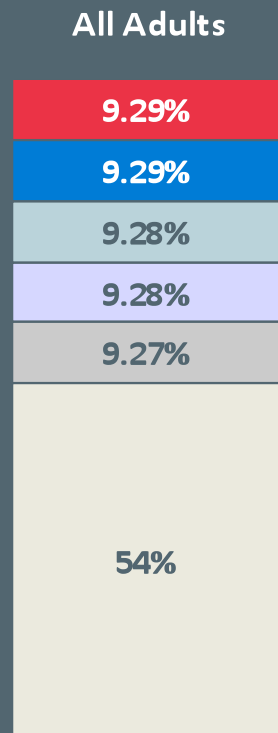
Plays, opera, ballet and dance – national and regional radio breakdown – total attenders 1796

Type of radio station listened yesterday	Number	Index – likelihood that they will listen
National	1,133,000 (65.6%)	+17%
Regional	842,00 (48.7%)	Gen pop



Levels of Direct Mail responsiveness

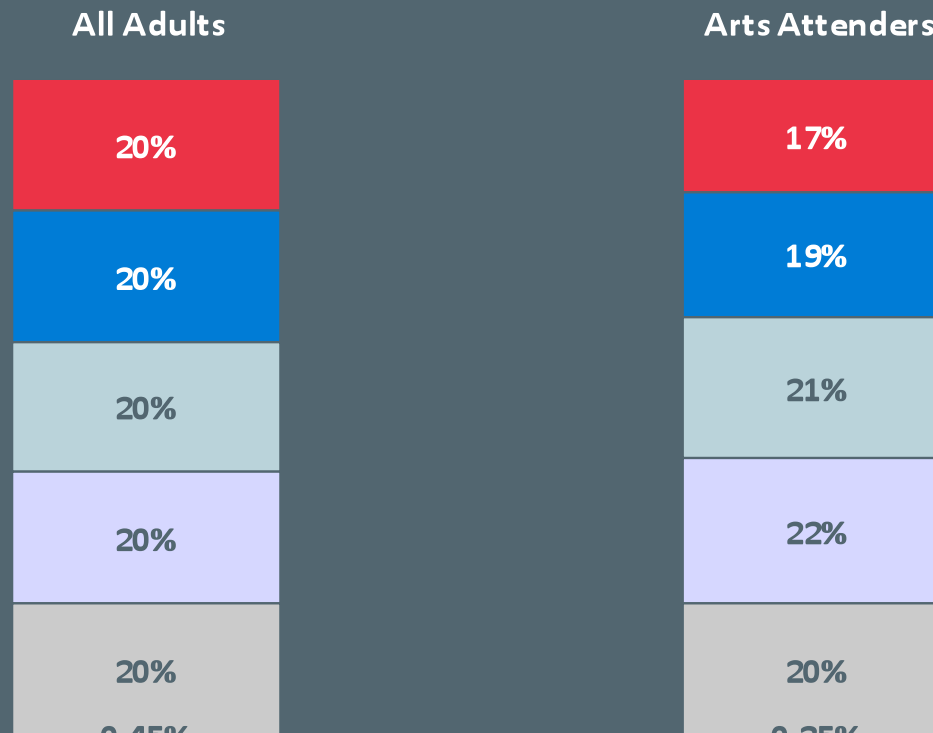
■ Quintile 1 (Highest) ■ Quintile 2 ■ Quintile 3 ■ Quintile 4 ■ Quintile 5 (Lowest) ■ None



Arts Attenders are in the higher quintiles for responsiveness to direct mail

Levels of TV Viewership

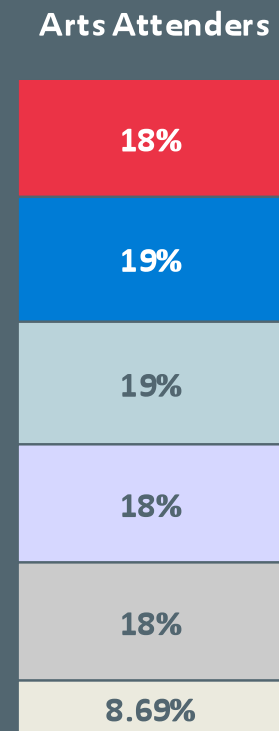
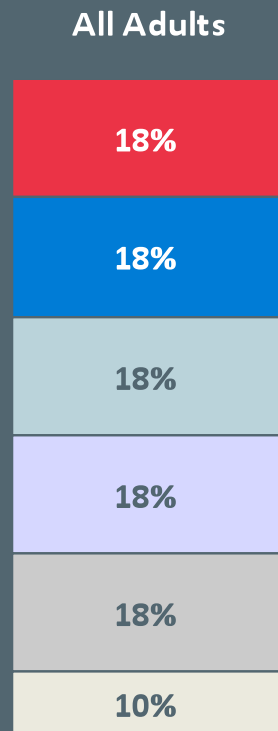
■ Quintile 1 (Highest) ■ Quintile 2 ■ Quintile 3 ■ Quintile 4 ■ Quintile 5 (Lowest) ■ None



} Arts Attenders are medium TV viewers compared to other adults

Levels of Newspaper Readership

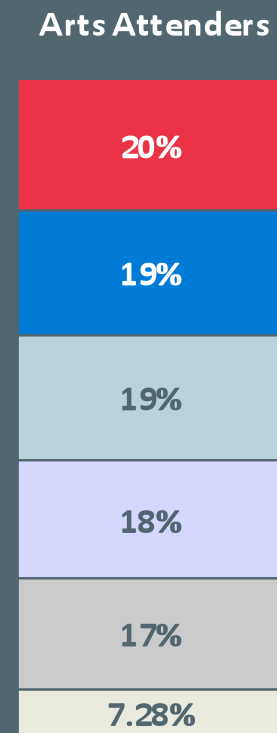
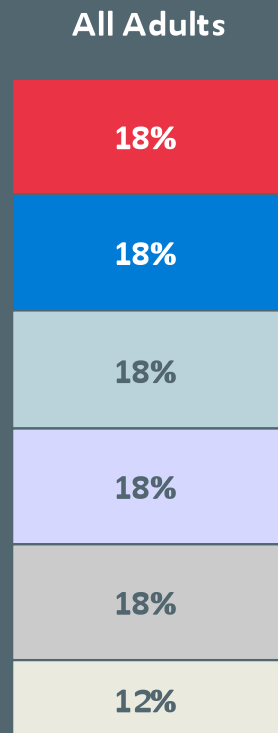
■ Quintile 1 (Highest) ■ Quintile 2 ■ Quintile 3 ■ Quintile 4 ■ Quintile 5 (Lowest) ■ None



Scores on Newspaper readership are average compared to the population

Levels of Radio Listenership

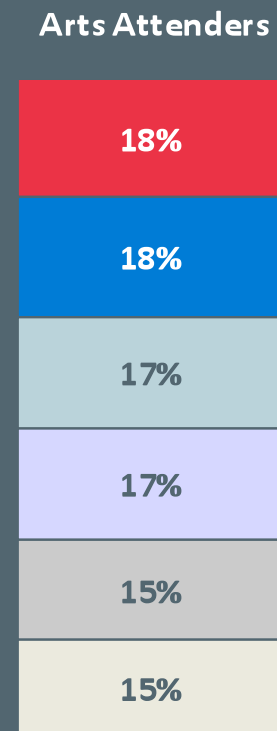
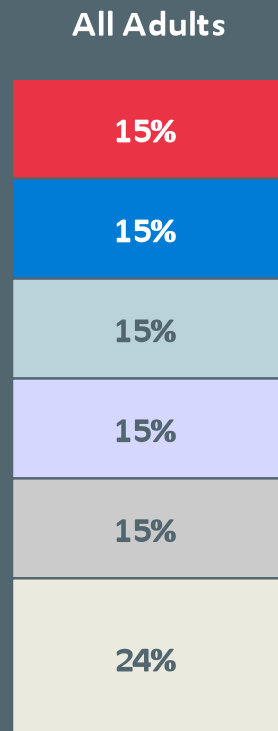
■ Quintile 1 (Highest) ■ Quintile 2 ■ Quintile 3 ■ Quintile 4 ■ Quintile 5 (Lowest) ■ None



Arts Attenders are higher radio listeners than other adults

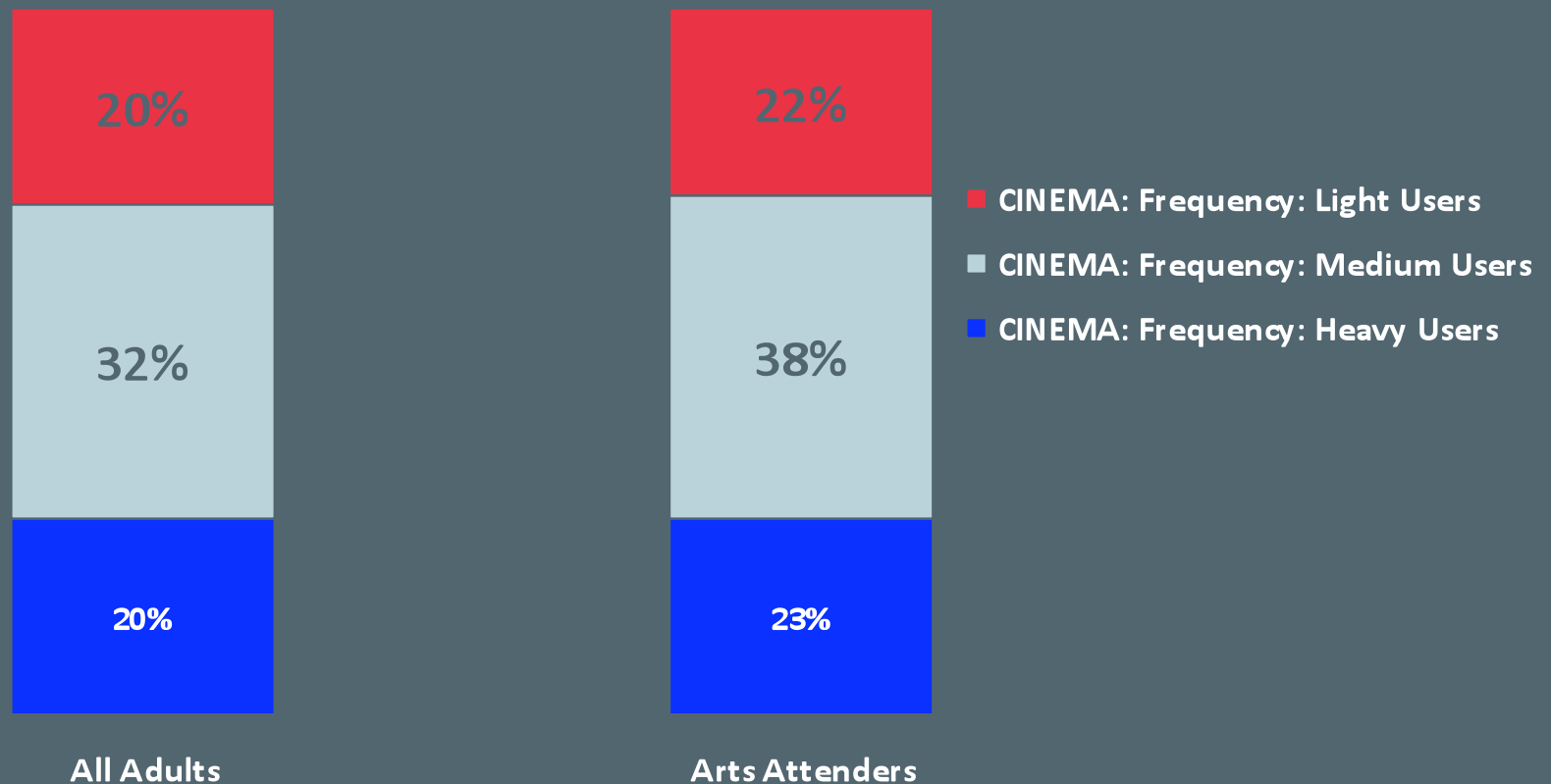
Levels of Internet Use

■ Quintile 1 (Highest) ■ Quintile 2 ■ Quintile 3 ■ Quintile 4 ■ Quintile 5 (Lowest) ■ None



Arts Attenders
more likely to be
heavier Internet
users than the
average adult
population

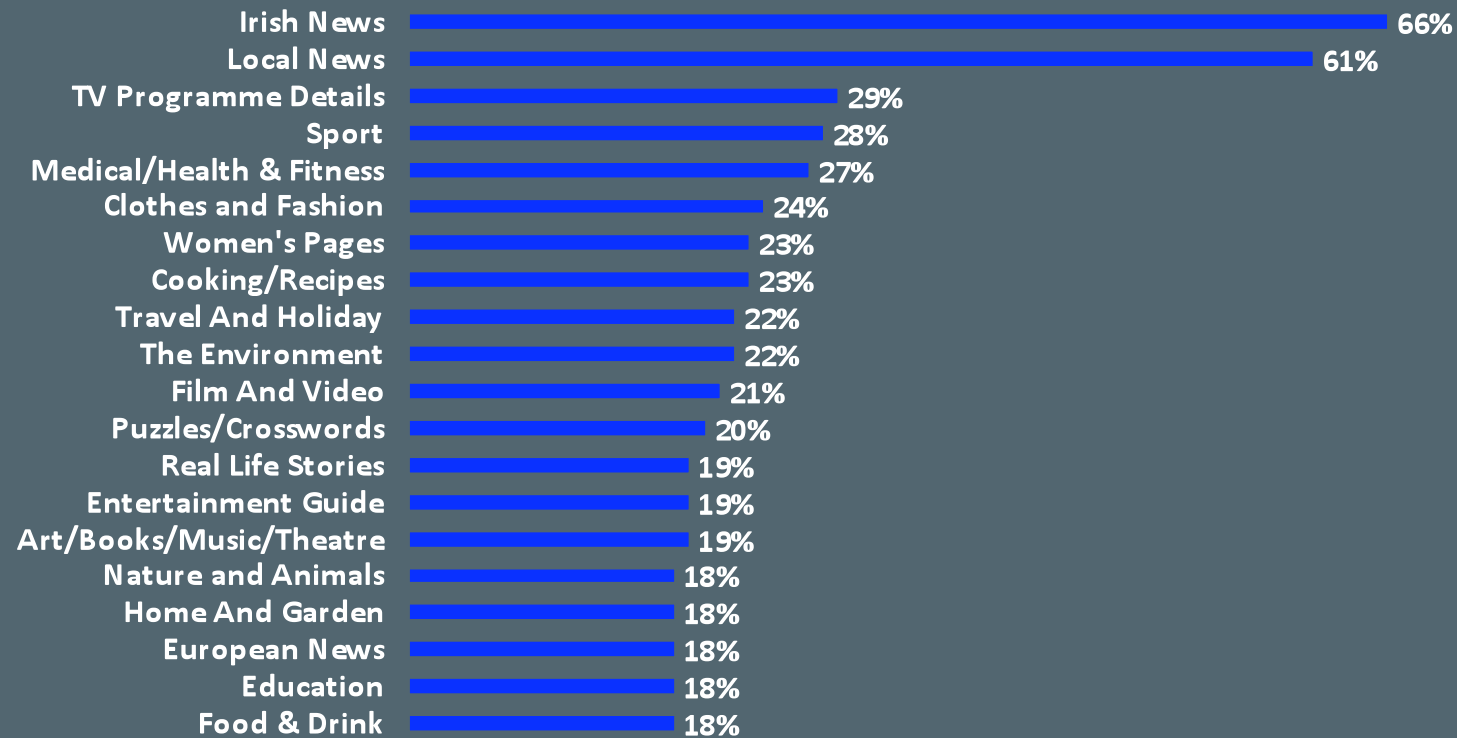
Cinema Attendance



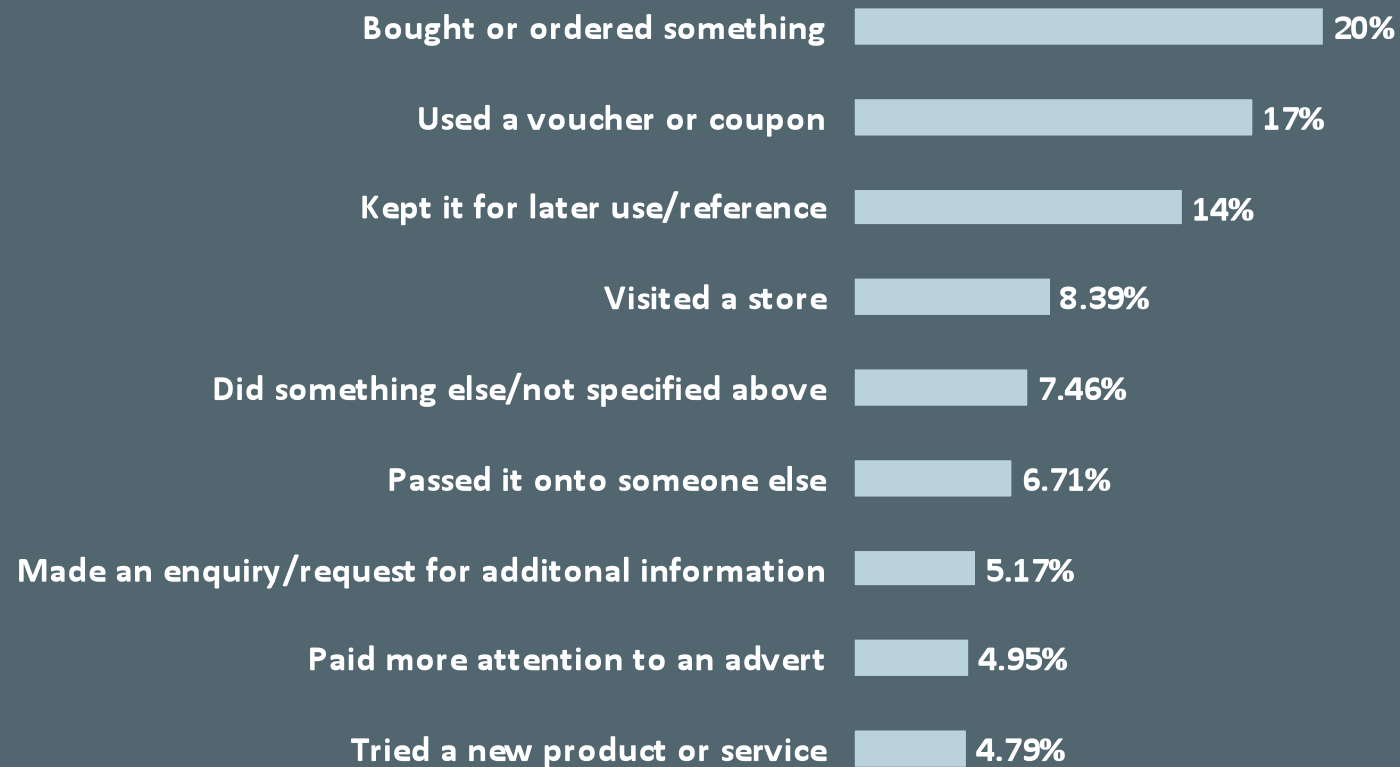
Audience – All Arts Attenders (Theatre, Plays, Opera, Ballet, Contemporary Dance)

Responded to Direct Mail (once or twice OR three times or more)

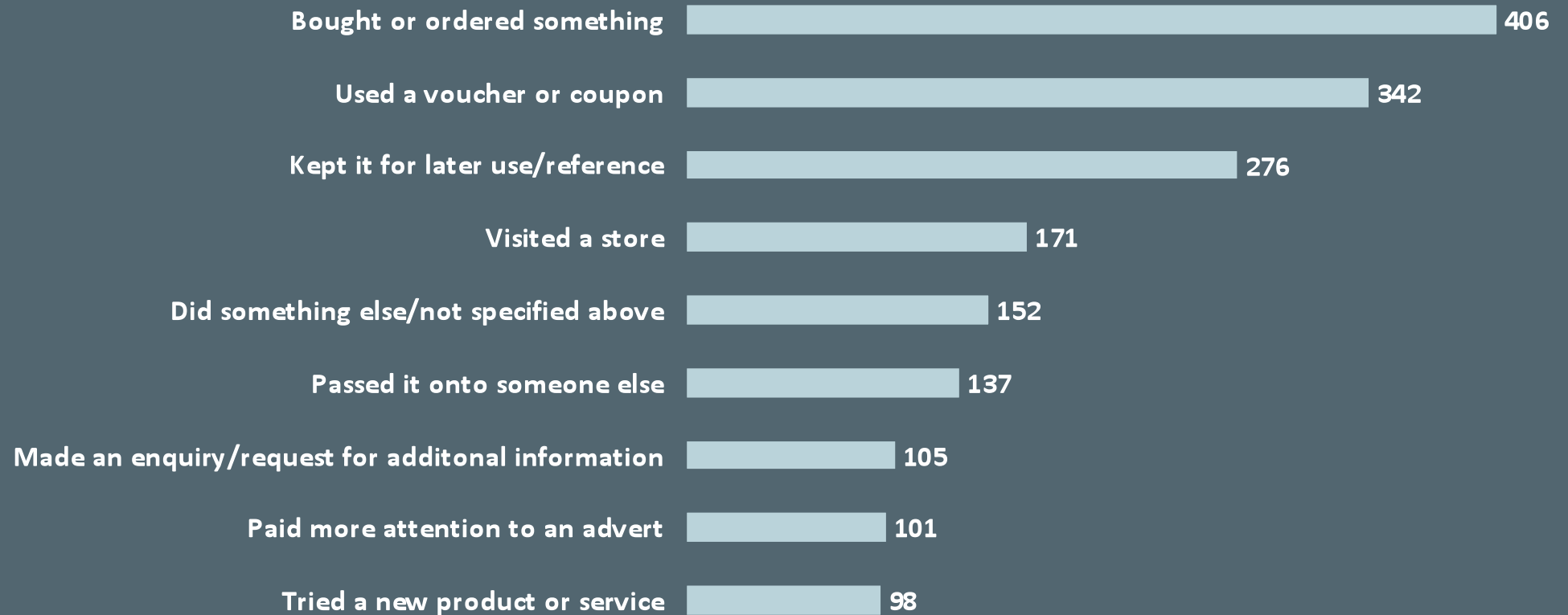
Newspaper Topics of Interest



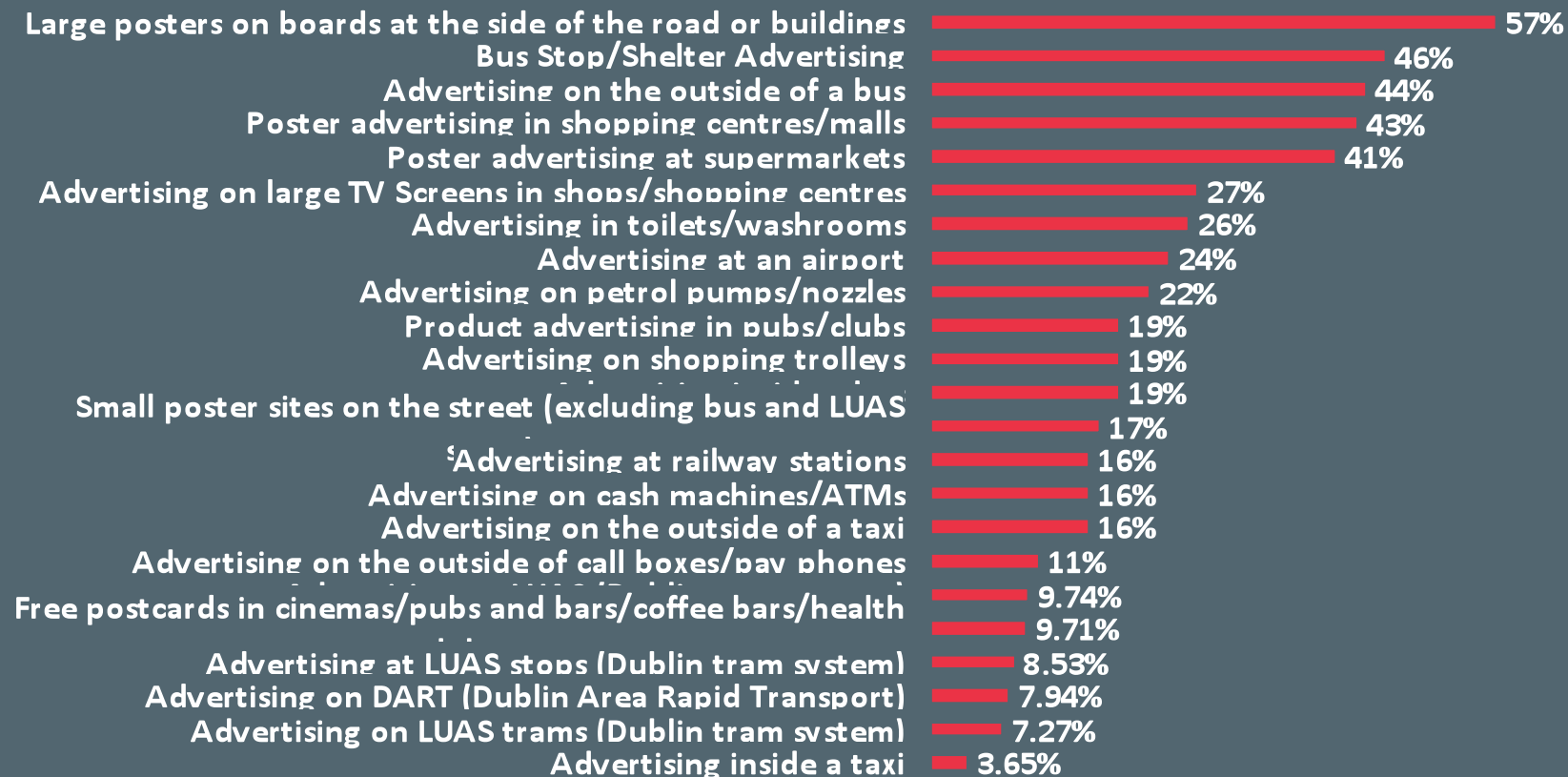
Response to Direct Mail (%)



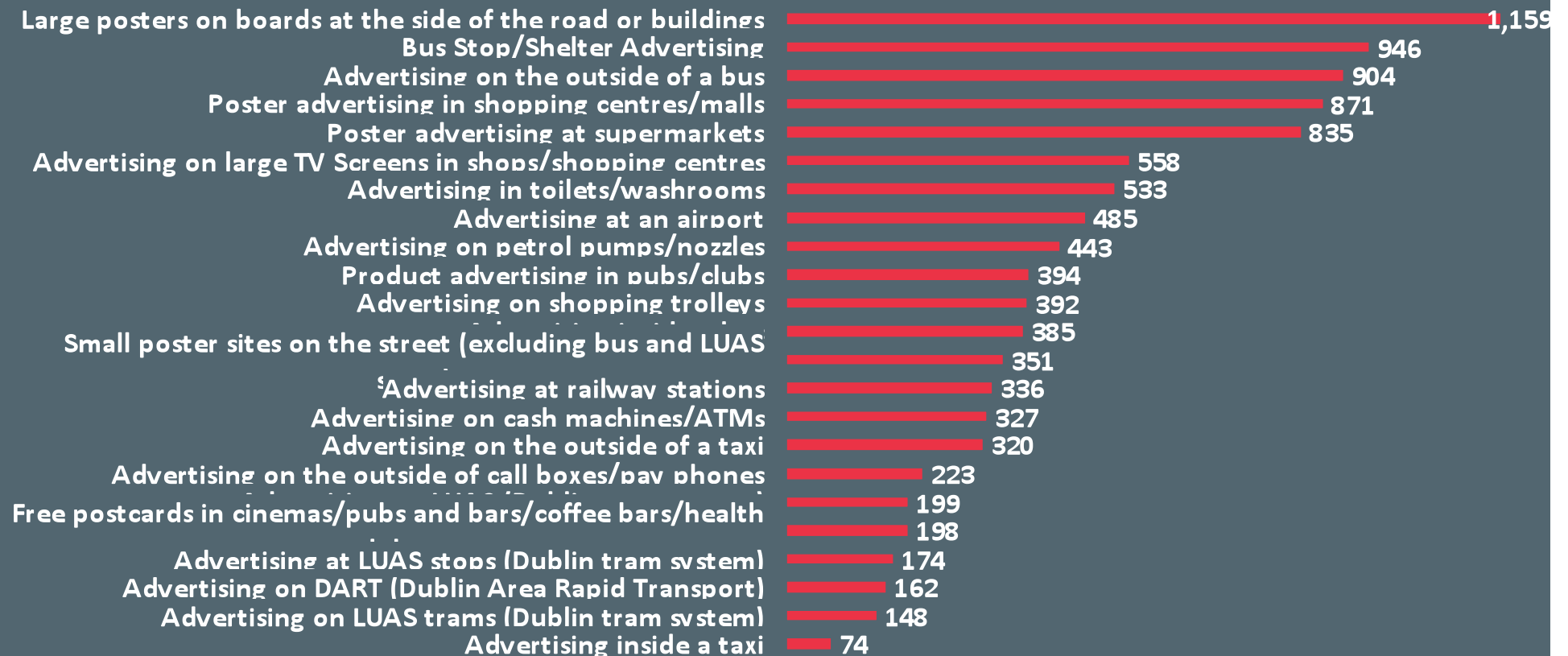
Response to Direct Mail (000s)



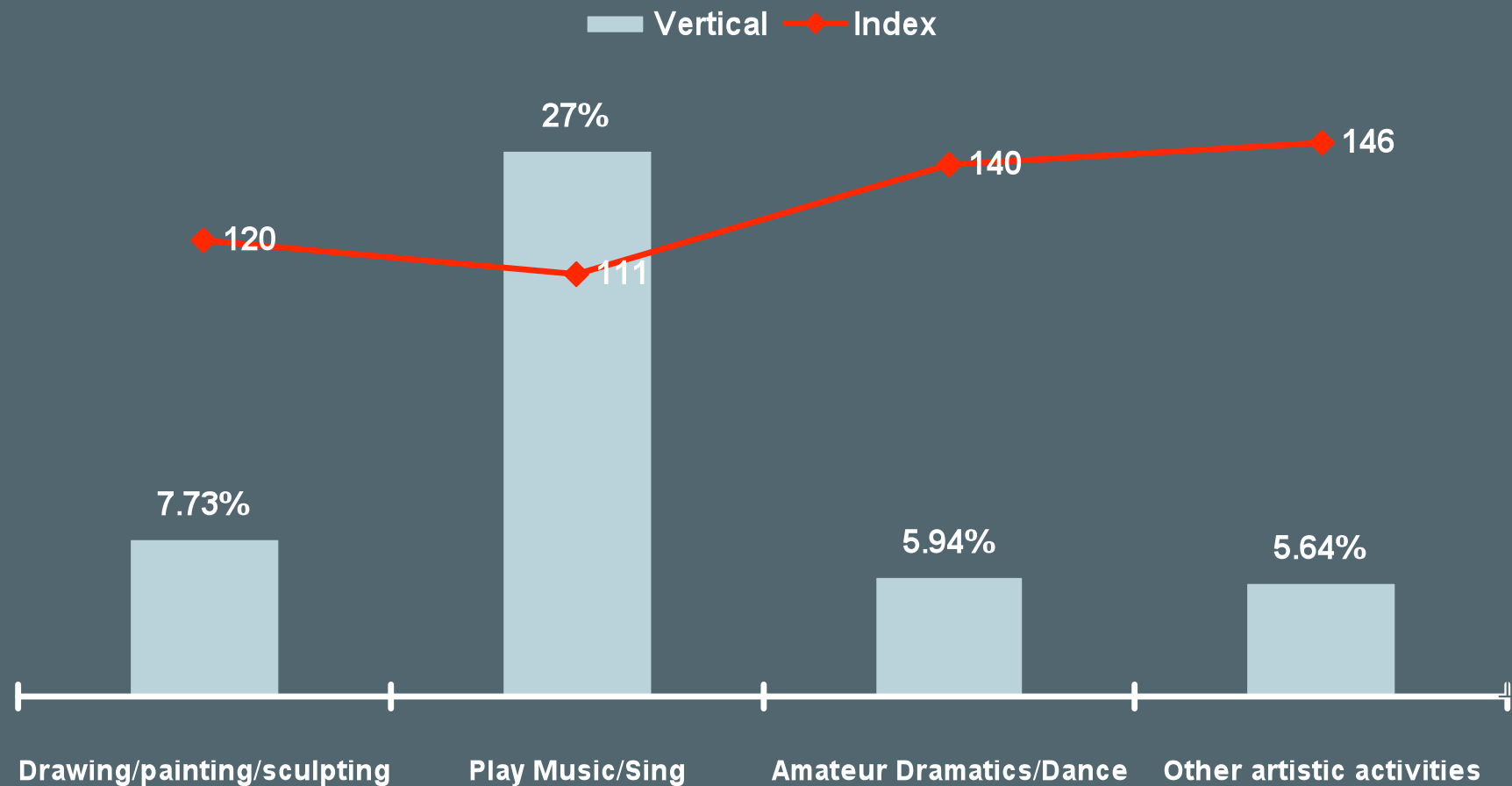
Outdoor seen in the past week %



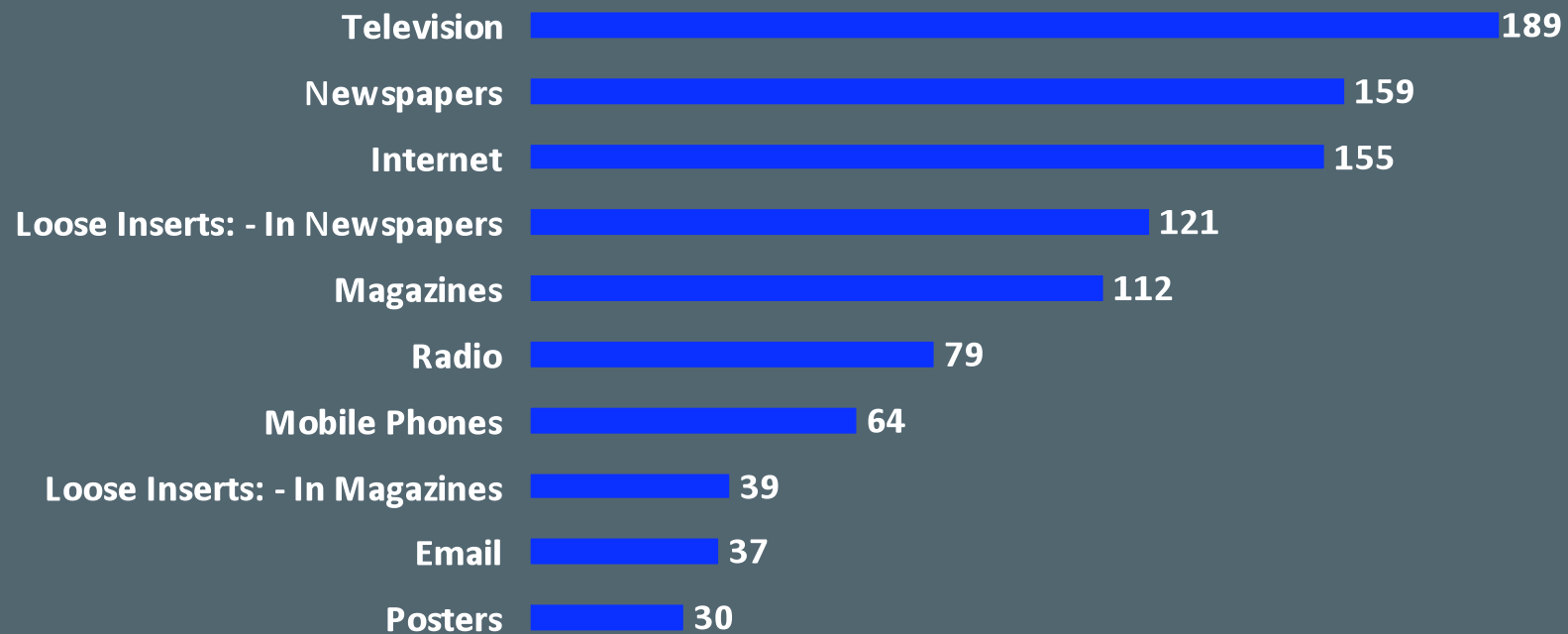
Outdoor seen in the past week (000s)



Regularly do Artistic Activities



Promotions & Offers – how many arts attendees responded to offers across these channels?

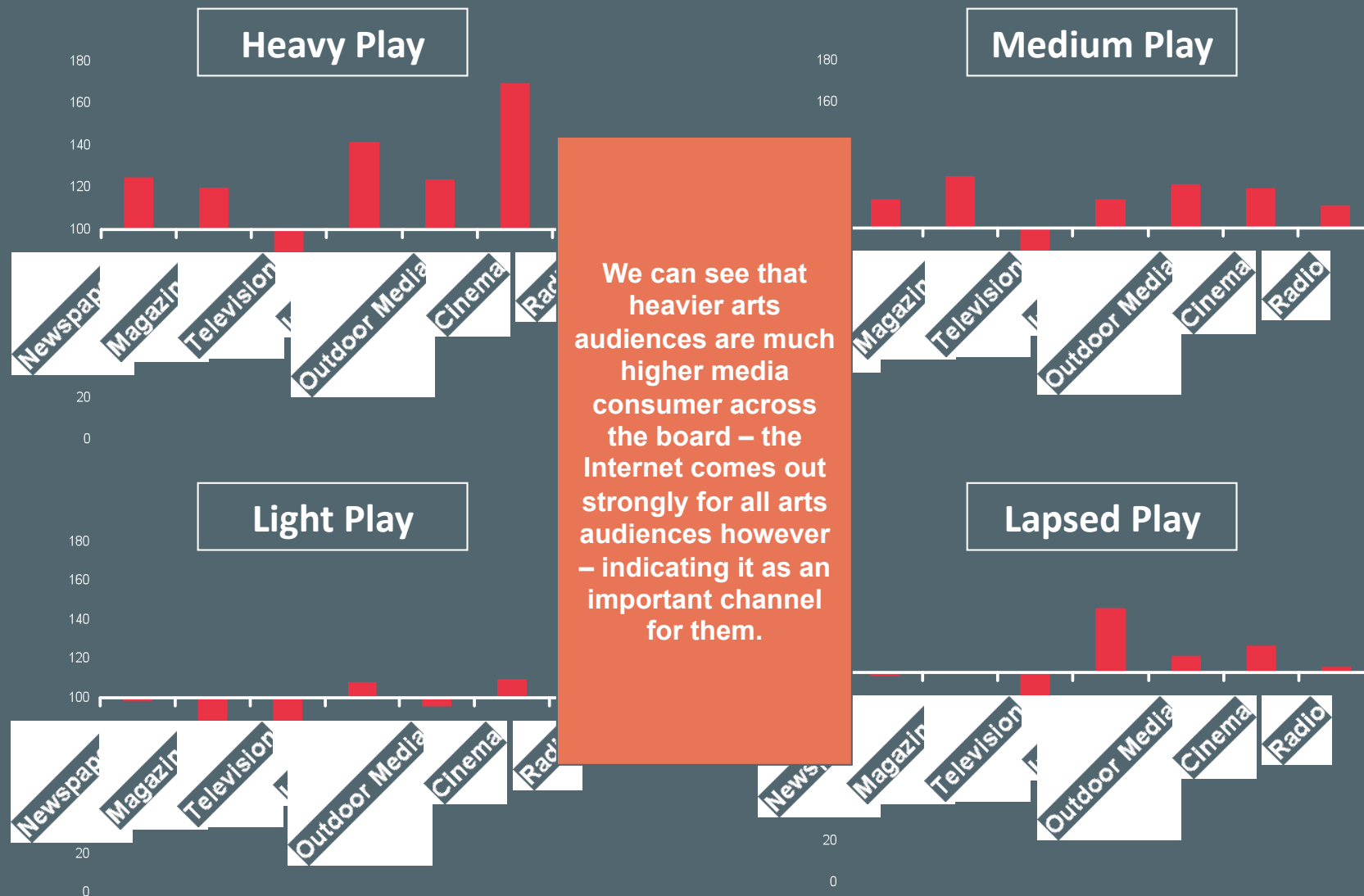


Looking deeper into specific audience segments

- How does media consumption vary across Play attendance?
- In what ways would we change our media choices, based on what type of theatre goer the play was aimed at?



Media Consumption Patterns of Play attenders



Play Attendance: Heavy = once every 2-3 months or more

Medium = 2-3 times a year

Light = once a year

Lapsed = less than once a year

Based on Media Quintiles 1 or 2 Indices

Top Indexing TV Programmes across Play attendance

Looking at the top indexing TV programmes for play audiences gives us a really nice picture of their interests and leanings in terms of content.

Heavy play goers have quite serious TV consumption: news and sport.

Lapsed play goers show a lighter schedule – Sci Fi, Drama, Comedy



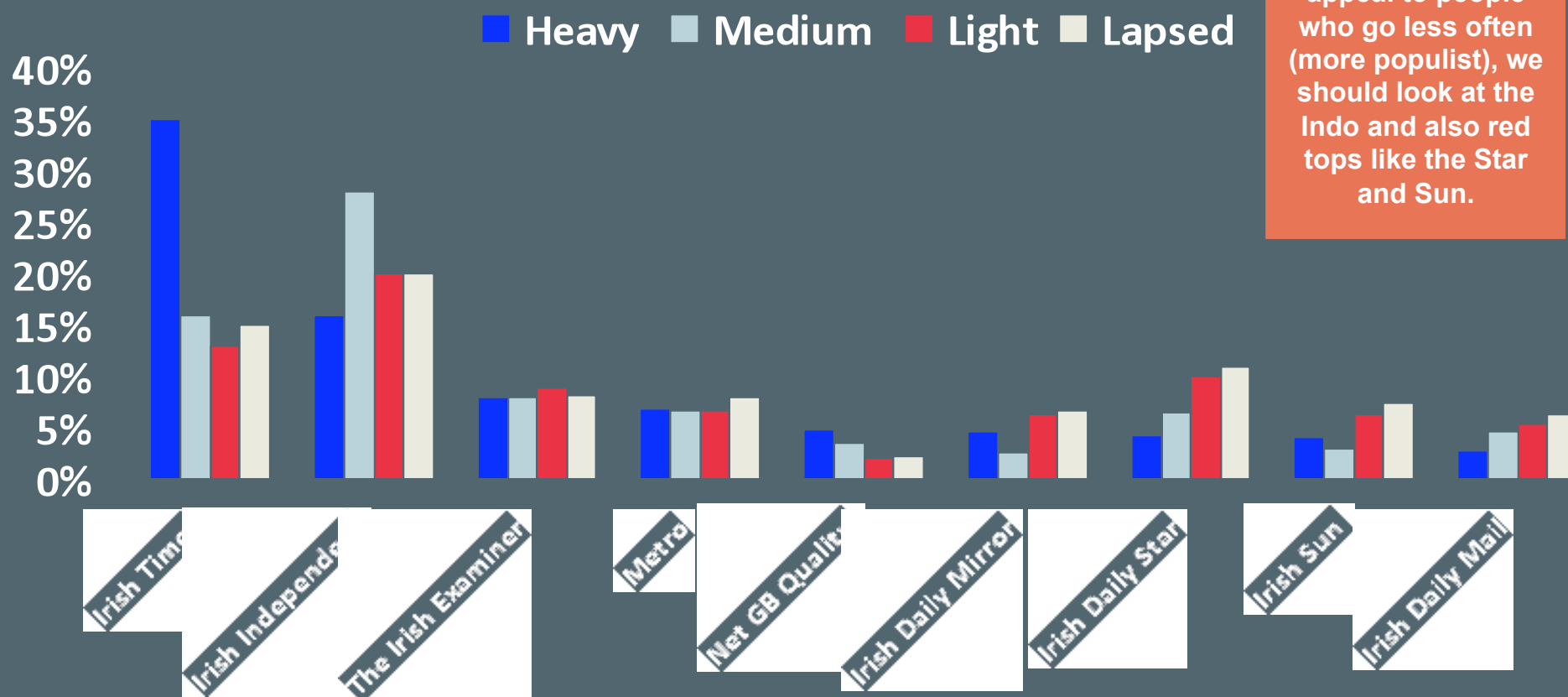
Play Attendance: Heavy = once every 2-3 months or more

Lapsed = less than once a year

"I specially choose to watch" TV Programmes

Daily Newspapers of Play attenders

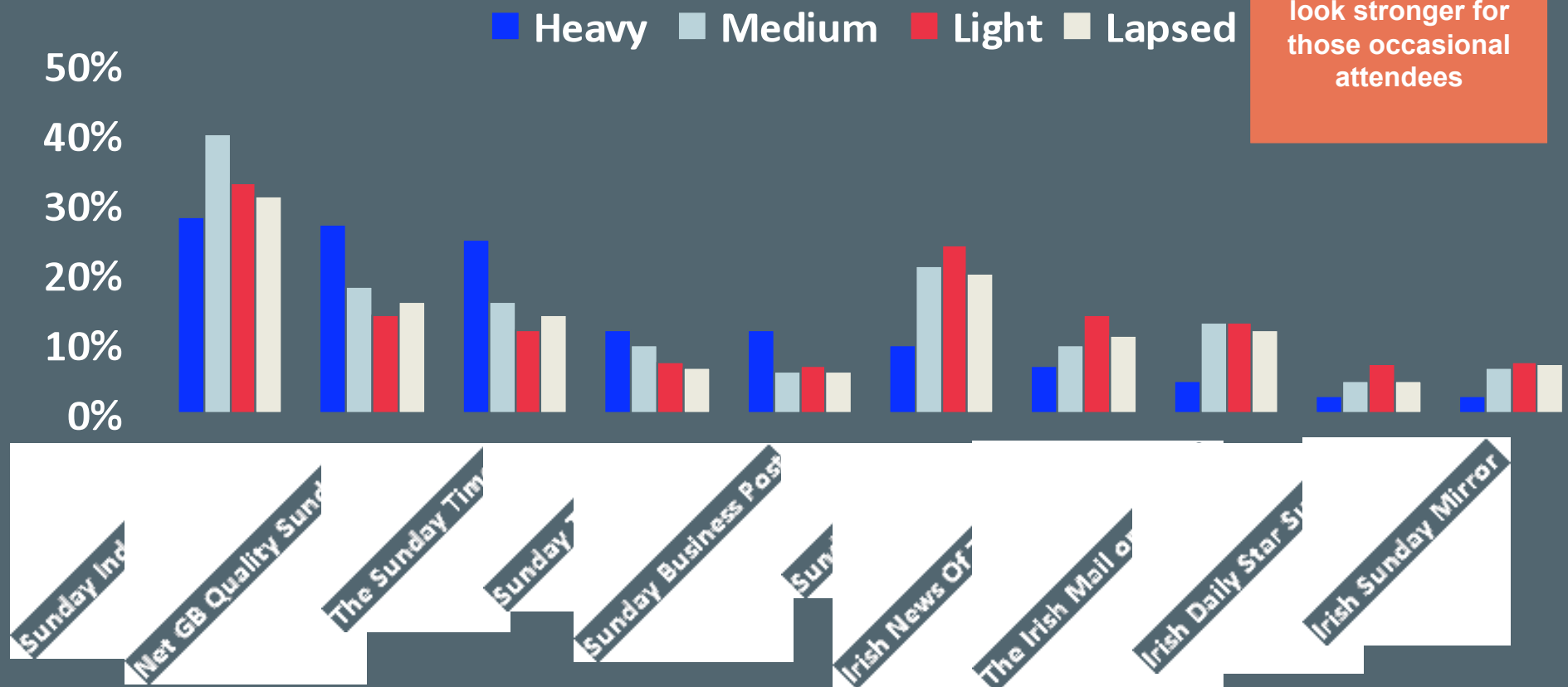
If your play is targeted at the heavy theatre loyalists – we can see The Irish Times is the only way to go. If however it's a play which should appeal to people who go less often (more populist), we should look at the Indo and also red tops like the Star and Sun.



Play Attendance: Heavy = once every 2-3 months or more Medium = 2-3 times a year Light = once a year Lapsed = less than once a year

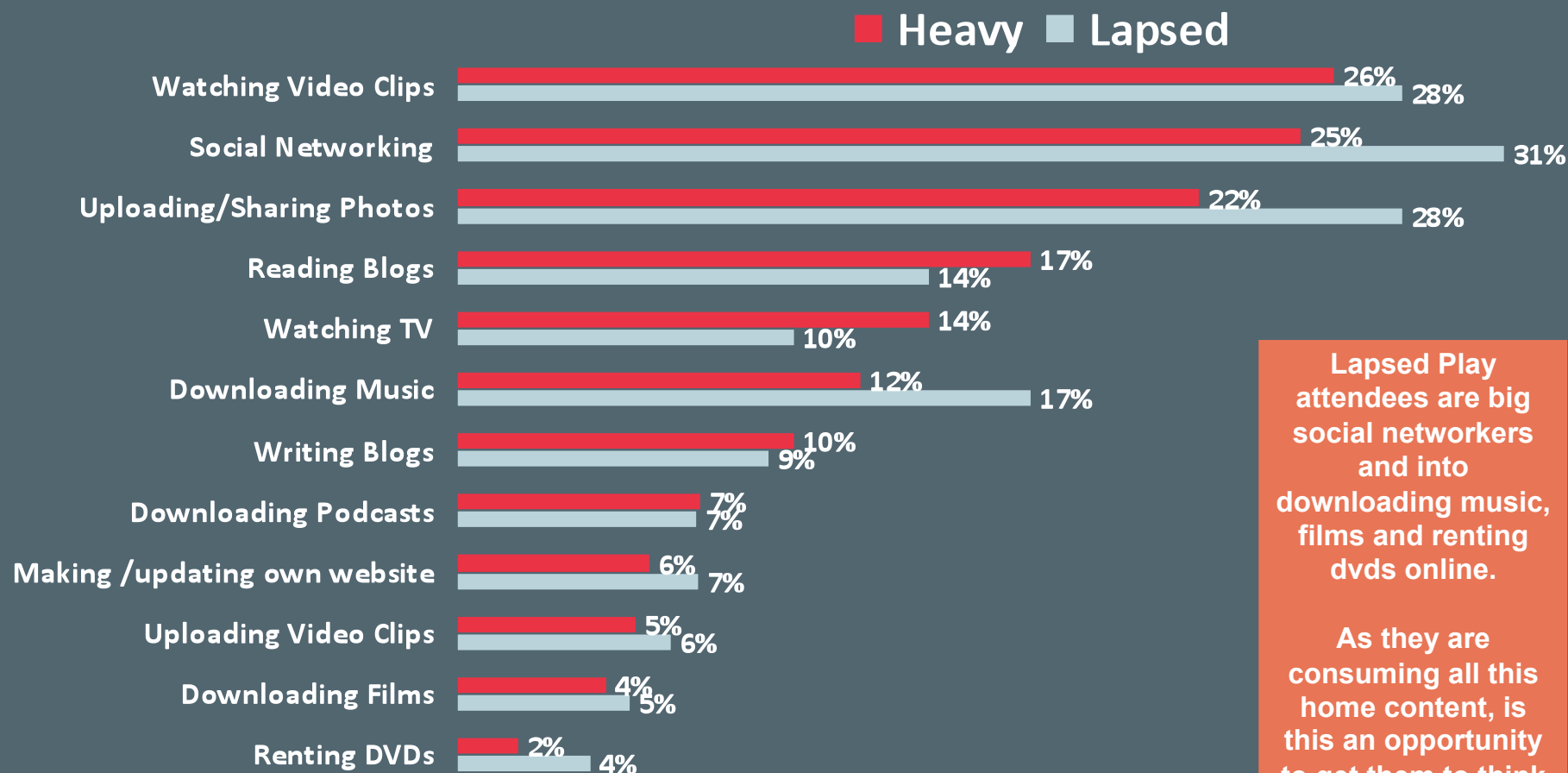
Sunday Newspapers of Play attenders

Similarly with Sundays – Sunday Times and GB titles for play lovers – but if you want to recruit, the Sunday Indo, Sunday World and Mail on Sunday look stronger for those occasional attendees



Play Attendance: Heavy = once every 2-3 months or more Medium = 2-3 times a year Light = once a year Lapsed = less than once a year

Internet consumption of Play attenders



Lapsed Play attendees are big social networkers and into downloading music, films and renting dvds online.

As they are consuming all this home content, is this an opportunity to get them to think about going OUT for entertainment.

Play Attendance: Heavy = once every 2-3 months or more

Lapsed = less than once a year

Who goes less often than once a year?

- Any performance in a theatre, plays, opera, ballet, dance
- 1,059,000 people report that they go less often than once a year
- 15% more likely to live in Dublin than the population
- 20% more likely to be in the 35-44 age group
- 404,000 45 and over
- More work to be done to identify behaviour and interests



Who goes once a year?

- Any performance in a theatre, plays, opera, ballet, contemporary dance
- Newspaper quintiles = general population
- TV quintiles = general population
- Other activities
 - 23% - 28% more responsiveness to direct mail
 - 1. Bought or ordered something 2. kept for later use or reference
 - Heavier internet users than the general population



Random facts

- In 08/09 attenders at performance were nearly 30% more likely to have an iPhone than the general population
- Among “heavy” attenders at any performance in a theatre; compared to general pop
 - 205% more likely to listen to Playback
 - 117% more likely to listen to Drivetime with Dave Fanning
 - 97% more likely to listen to Marian Finucane



How can we use this information?

- Comparing your own audience behaviour to it
- Using the information here for marketing; e.g heavy play goers
- Not just in media planning but also press and promotions e.g Sunday World
- Design of brochures

How can I access this information for sponsorship?

- Proposed guidelines – feedback sought
- Arts Audiences will run one four-piece report for any arts organisation in receipt of Arts Council funding who are putting together a proposal for a specific company or brand covered by the TG
- The sponsorship should have a cash value to the organisation in excess of 10,000 euro

Other uses of TGI

- Sponsorship and development
- Ulster Bank Dublin Theatre Festival Test
 - % of people with bank accounts in Ireland
 - % who bank with Ulster Bank (and main banks)
 - How many playgoers in Dublin bank with UB?
 - How much more likely are they to bank with UB?
 - Does UB have target groups e.g young people and can we say something about that?



Next steps

- Feedback sought on next release of information
 - What would be of most use to you?
 - Comment on www.artsaudiences.ie
 - Email