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PHASE ONE **EVALUATION SUMMARY**

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INTRODUCTION

LOOKSIDeways-EAST

LookSideways-East is a cultural tourism initiative which aims to ‘establish Norfolk and Suffolk as ‘must-see’ destinations’ (GFA application, 2014) and ‘to build audiences, visitors and customers for cultural venues in Norfolk and Suffolk, specifically ‘cultural tourists’” (Audience Development Plan, GFA, 2014). This has been further articulated through these aims:

To increase the number of people at specific cultural venues or events travelling more than a 30 minute drive-time, by 10% per annum and to increase the number of people at specific cultural venues or events travelling more than 1 hour by 5% per annum

To support the tourism sector in its aim to increase the value of the overall visitor economy by over 5% per annum

To increase overall attendance at the participating cultural venues and events by at least 10% over the course of the project

To increase the numbers of people visiting Norfolk and Suffolk who state that the cultural destination was the primary reason for their visit to the area

To raise awareness and improve perceptions of the cultural destinations of Norfolk and Suffolk over the course of the project and to encourage and consolidate repeat attendances of current cultural tourists aiming to increase the length of their stay and the quality of their experience

To demonstrate that the cultural tourists report their experience to be one of quality and satisfaction.

These aims were refined in the early stages of the project; it was decided to use the benchmark of 45 minutes drivetime from the main venues rather than 30 minutes. This was extended to the use of 90 minutes as an additional benchmark towards the end of the first phase. These were chosen as more meaningful ways of identifying cultural tourists than the original benchmark given the rural nature of much of Norfolk and Suffolk. Some of the other aims were also altered and expanded though with no less ambition than originally articulated.

The evaluation of this project was carried out by The Audience Agency, focusing on research into the audiences and visitors. This report doesn't directly address more general factors such as the quality of the partnership or the management of the project, though these aspects merit occasional comments and may be

implied from the overall outcomes.

The author of this report was involved in the project from the beginning, attending the regular Cultural Tourism Operations Group meetings, presenting to the LEP Cultural Board and other gatherings associated with the project. This included regular reporting and advising on factors based on research compiled at each stage. As a result, a fair amount of ‘formative evaluation’ took place throughout so that the project adapted and changed according to the intelligence gathered.

This report aims to provide a more summative overview for the end of the first phase (end of 2017). A few reflections and suggestions for the next phase are included in the final chapter for consideration as the initiative continues to progress.

CULTURAL TOURISM IN NORFOLK AND SUFFOLK

Cultural tourism comes with a range of definitions ranging from the broad to the more specific. This project, as an initiative which aims to make a difference with limited resources and rooted in arts funding programmes, has concentrated on attracting people to arts events and venues. This was a question of emphasis rather than exclusion and means that heritage, visitor attractions, entertainment or personal cultural activities are not the main focus.

In practical terms, it was decided to use a definition drive time of 45 minutes from each venue (museum, gallery, festival). There are differences between types of venues and the influence of being urban or rural and large or small scale, but by setting this as a consistent benchmark it provided a useful source of market intelligence for the project and a consistent benchmark to measure over time.

KEY FINDINGS



The Turn of the Screw at Aldeburgh Music's Britten Weekend.
Photo by Sam Murray-Sutton.

The first phase of LookSideways-East took place between 2014 and 2017, with these being some of the important outcomes:

Between 2014/15 and 2016/17 in the core group of venues there was an increase of 18% of attenders from beyond 45 minutes drivetime and an increase of 16% of attenders from beyond 90 minutes drivetime.

It is estimated that cultural tourists account for 65,000 people making 190,000 visits during the course of the final year (April 2016 - March 2017) at the main venues and festivals.

There is a trend from local to national when looking at bookers as a proportion of ticket buyers at the core venues (from 19% to 21%).

In surveys, 51% of attenders stated that culture was the main reason for their visit to the region, and for 68% that it was an important factor.

30% of cultural tourists have connections to the region such as friends, family, educational or business interests.

Cultural tourists are coming from a wide area in England with notable hotspots being London, the area around London (including the Home Counties), the edges of the East of England region and the East Midlands.

The significant Audience Spectrum groups are Metroculturals, Commuterland Culturebuffs, Dormitory Dependables, Trips and Treats, and Home and Heritage.

The significant Mosaic 6 groups are City Prosperity, Prestige Positions, Country Living, Rural Reality, Senior Security and Domestic Success.

Key words used to describe culture in Norfolk and Suffolk amongst cultural tourists are varied, interesting, accessible, vibrant, good, quality, diverse, excellent and professional.

62% of cultural tourists stayed somewhere other than their home on their cultural visit and 68% of these stayed in paid accommodation.

Cultural tourists reaching the venue websites mainly arrived via search engines having typed in the organisation name. Social media, especially Facebook, was also important.

The LookSideways-East social media campaigns, especially using Facebook, had high click-through rates and were well targeted and implemented.

The Focus Group participants, when shown, were impressed with the range and interest of the cultural events on offer, but they needed to be given a reason to attend an event in a particular place at a particular time. They need to know what is unique and special.

Visitor Spend of cultural tourists attending events and activities at the main organisations during a year was calculated at £13m.

NOTES ON METHODOLOGY, ANALYSIS AND REPORTING



Artonik, The Colour of Time at Out There Festival.
Photo by David Street

This evaluation has been based on data and information gathered over three years between 2014 and 2017 using these main sources/methods:

Box office/ticketing data drawn through Audience Finder

Other entrance/visitor data self-reported or manually analysed

Surveys (conducted as e-surveys and face to face)

Hitwise online monitoring system

Social media tracking tools (undertaken by Spring)

Focus Groups

To this has been applied further analysis such as comparison with secondary public data (eg. Census and TGI), mapping, geo-demographic profiling (Audience Spectrum and Mosaic 6) and visitor spend.

The overall evaluation has also benefited from many informal and group discussions with most of the main participant organisations and individuals.

In addition Spring, which led the management and operation of the first Phase of LookSideways-East, produced a report on the project which has been drawn on in this evaluation.

HEADLINE FIGURES

An estimate of the number of cultural tourists at the main Norfolk and Suffolk cultural organisations can be compiled by combining statistics: the data collected through box offices, entrance data, self-reporting by venues and available public data.

At a global level, an estimate of the number of attendances/visits at the main cultural organisations of Norfolk and Suffolk is:

1,500,000 visits/attendances in the 2016-2017 year

This excludes heritage sites, visitor attractions, stately homes and small museums.

Attendances registered through venues in Audience Finder (DanceEast, New Wolsey, Norwich Arts Centre, The Apex, Bury Theatre Royal and Theatre Royal Norwich at April 2017) in the 2016-2017 year totalled:

803,000 attendances overall

99,000 attendances from more than 45 minutes drivetime (includes 90 mins+)

21,000 attendances from more than 90 minutes drivetime

The number of attendances from beyond 45 minutes represents 12-13% of attendances but 21-22% of bookers.

This is because local attenders tend to come in larger groups and attend more frequently. Looking at the number of bookers (the people who purchase the tickets), the following figures are obtained for the 2016-2017 year:

124,000 bookers overall

26,000 bookers from more than a 45 minutes drivetime (includes 90 mins +)

7,000 bookers from more than a 90 minute drivetime

Comparing this core group with previous years it is possible to see increases/decreases over the three years for those attending over a 45 minutes drivetime

2014-2015	84,589 attendances	20,997 bookers
2015-2016	94,079 attendances	24,972 bookers
2016-2017	99,401 attendances	25,851 bookers

From 2014-2015 to 2016-2017 this represents an increase of:

17.5% in attendance and 23% in bookers

There is also an increase in the proportion of people attending from beyond the 45 minutes drivetime as a proportion of the overall total; +0.5% of attendances and +2.5% of bookers, meaning there has been a slight trend towards attracting more cultural tourists than local audiences.

If this pattern is replicated across the wider Norfolk and Suffolk cultural offer then the following numbers and increases could be deduced.

1,500,000 attendances/visits in 2016-2017 year (main arts and cultural organisations)

191,000 attendances/visits of people from more than a 45 minutes drivetime

40,685 attendances/visits of people from more than a 90 minute drivetime

Based on the estimates of bookers vs frequency of attendance this would seem to suggest approximately 75,000 people visiting from beyond the 45 minutes drivetime, and engaging with the main cultural organisations in the year. This equates to around 11,500 more cultural tourists per year than at the start of the project.

The detail of who these people are and where they come from is indicated in the sections below, using a combination of ticketing and survey data to understand the Norfolk Suffolk Cultural Tourist.

AUDIENCE PROFILE



LookSideways-East research has analysed available data of people attending arts and cultural events in Norfolk and Suffolk. This has been used during the project as a way of targeting the most likely audiences and communicating with them in a way that will attract them to events. The benchmark of identifying attenders from beyond 45 minutes drivetime has been used.

These maps and profiles are based on the postcodes from 13 organisations: Colchester and Ipswich Museums (Christchurch Mansion Ipswich and Ipswich Museum), DanceEast, New Wolsey Theatre, Norfolk and Norwich Festival, Norwich Arts Centre, Norwich

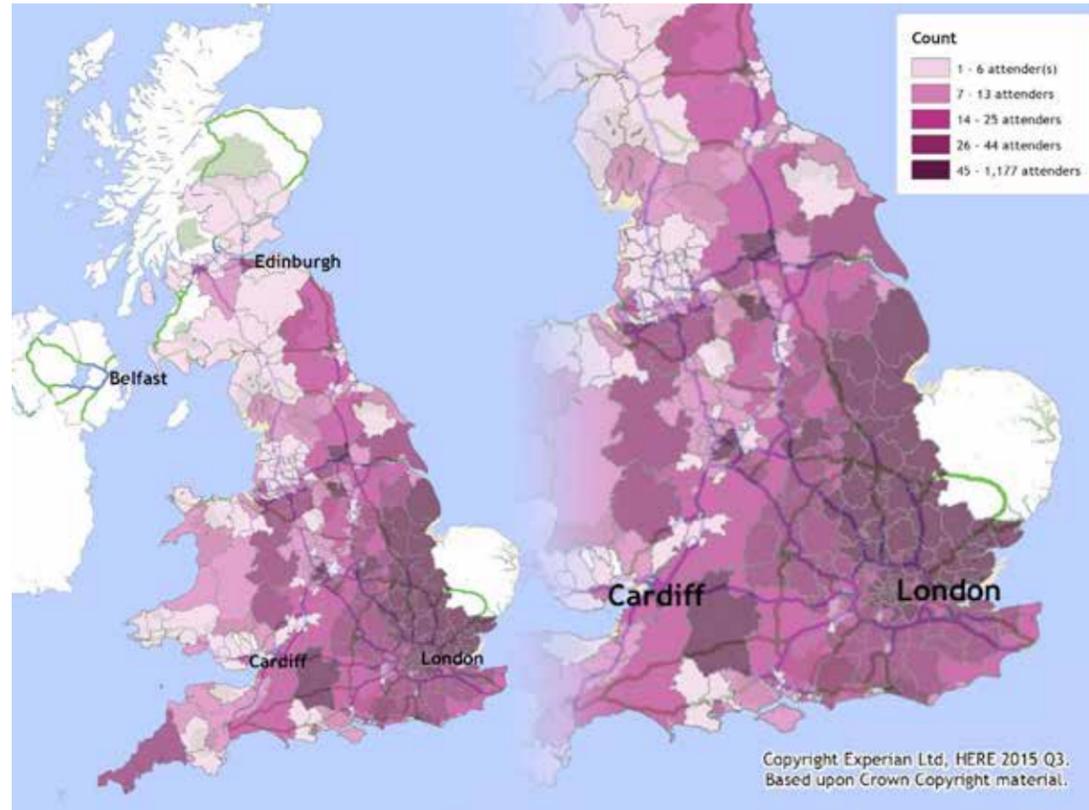
Castle Museum and Art Gallery, Norwich Theatre Royal, Out There Festival, Snape Maltings, SPILL Festival 2016, The Apex, Theatre Royal Bury St. Edmunds and Writers' Centre Norwich for the 2016-2017 year. In total, across all 13 venues, 143,422 postcodes were analysed.



GEOGRAPHY AND LOCATION

The home location of Norfolk and Suffolk cultural tourists is shown in this map of the 2016-2017 data with those living in Norfolk and Suffolk excluded. The darker areas represent higher numbers.

The right hand graphic has higher magnification enabling a closer look at the nearer areas.



Although the nearer people are to the venue, the more likely they are to attend, this phenomenon isn't uniform and some areas have a much higher attendance than others. This is partly because the types of people who live there, alongside travel links, are influential factors. There are also historical connections between areas, for example between Essex and the Suffolk coast and the East Midlands and Norfolk.

The local authority areas with the highest number of attenders outside Norfolk and Suffolk are: Colchester (4% of those outside Norfolk Suffolk), Tendring (3%), Braintree (2%), Huntingdonshire (2%), Islington (2%), Haringey (2%), South Cambridgeshire, Chelmsford, Lewisham, Lambeth, Central Bedfordshire, Barnet, Peterborough, Southwark, East Hertfordshire, North Hertfordshire, South Kesteven, Wandsworth, Westminster, Hackney, St Albans and Cambridge (all above 1%).

In developing cultural tourism initiatives it is vital to understand the location of current attenders because, as shown above, their involvement is not purely linked to proximity. They are found in particular places, are certain types of people and are looking for particular offers. One of the successes of this project has been the way this has formed the basis of key marketing strategies.

The data can also be used in the longer term to investigate the 'cold spots' - those places with relatively low engagement that may be worth further attention. It has to be considered carefully however, as it is difficult to make an impact on low resources and work against a history of many years. More practically, it will be effective to work on the 'warmer cold' spots - places where there is already potential interest and travel links such as in the cities of the East Midlands.

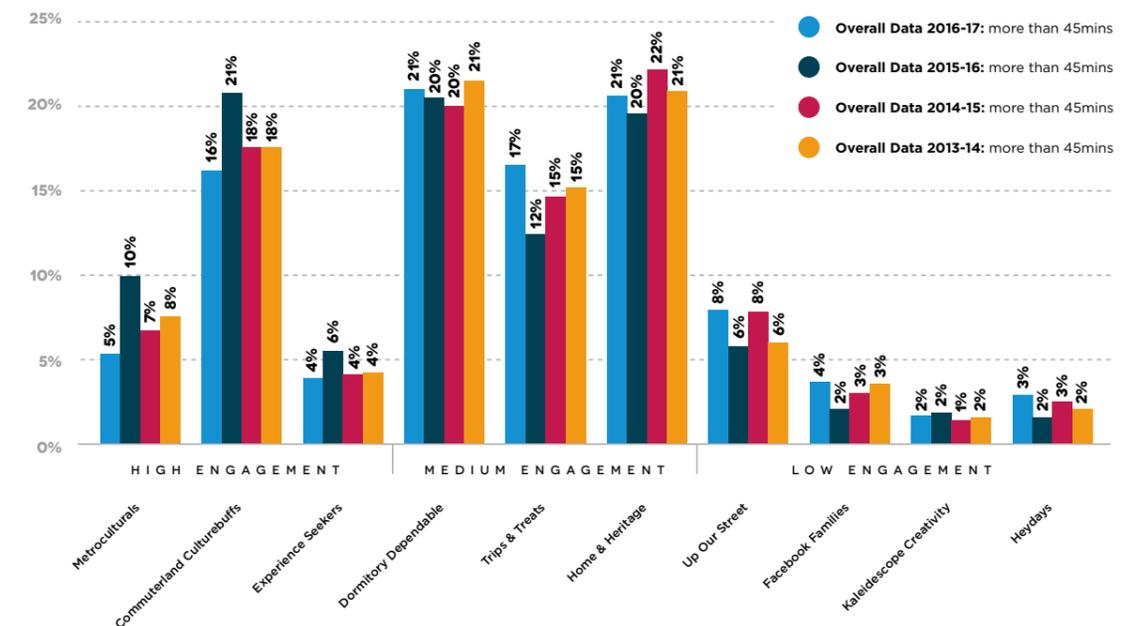
GEO-DEMOGRAPHIC PROFILING - AUDIENCE SPECTRUM

From its initial stages, LookSideways-East has aimed to understand the profile of actual and potential cultural tourists to inform the direction of the project. This segmented approach was developed using Audience Spectrum and Mosaic 6.

AUDIENCE SPECTRUM

Audience Spectrum divides the population into 10 categories or segments which indicate an attitude to and level of engagement with arts and culture. These include people who are normally high attenders, those who engage occasionally and those who rarely

engage. Each type also has its own characteristics so for example, Metroculturals and Commuterland Culturebuffs are both high engagement groups, but have different attitudes to the arts.



The graph above shows how certain profiles are more significant in the Norfolk Suffolk cultural tourist profile. It is worth noting that there are few Metroculturals in the East of England as they tend to be based in cities and therefore their presence here as motivated high engagers is notable. Also interesting is the Commuterland Culturebuffs group, highly engaged but more inclined towards what they see as established 'quality' work. The mid-engaged groups Dormitory

Dependables, Trips and Treats and Home and Heritage are also worth attention. They are open to persuasion and are clearly present in this audience. What they are looking for is an offer that takes into account their wider needs; in the case of Trips and Treats, a key target for this project, this means extended benefits such as food and retail opportunities and the opportunity to have social experiences with friends and families.

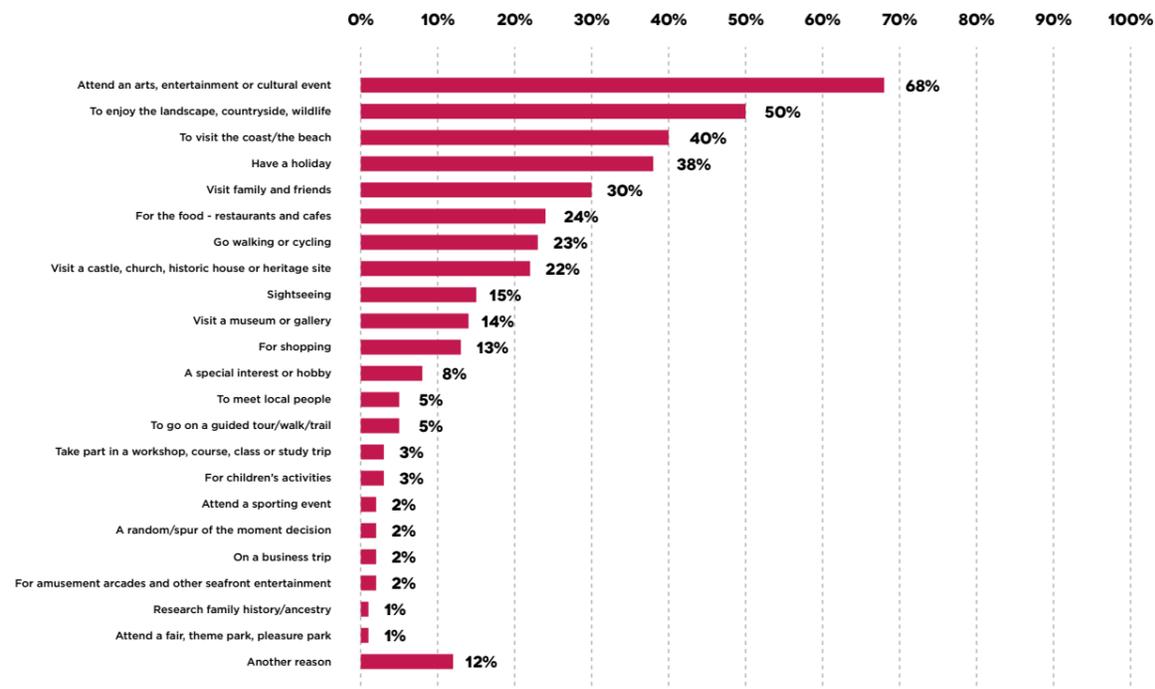
AUDIENCE VIEWS & BEHAVIOUR

Survey data has been used to understand why and how cultural tourists are engaging, what they think of the experience and their suggestions for the future.

Khlestakov
But then I thought, what if it gets
back to the Czar and pretty soon
he'll be drawing up the H...
list and well...

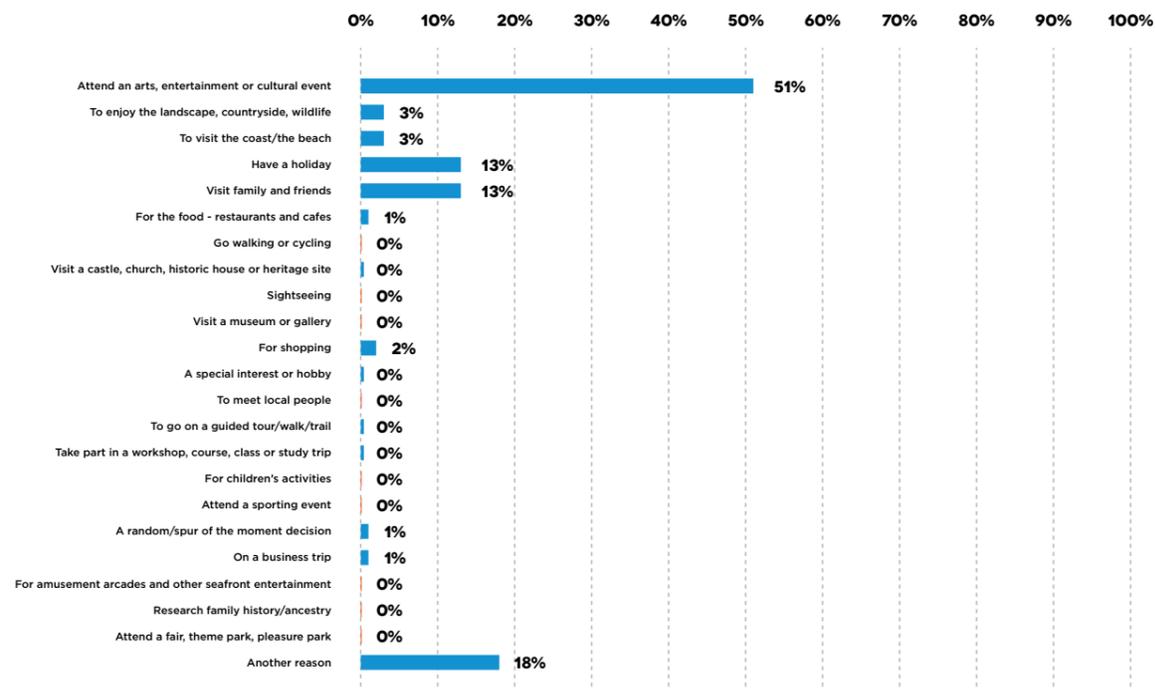
MOTIVATION AND MARKETING

When looking at the results of the questions, 'Which of these were your reasons for visiting the area? (Tick all that apply)' and 'Which was your main reason for visiting the area? (Tick one only)', it is possible to understand the main 'driver' to visit alongside other contextual reasons for visiting. This is the 'all reasons' result.



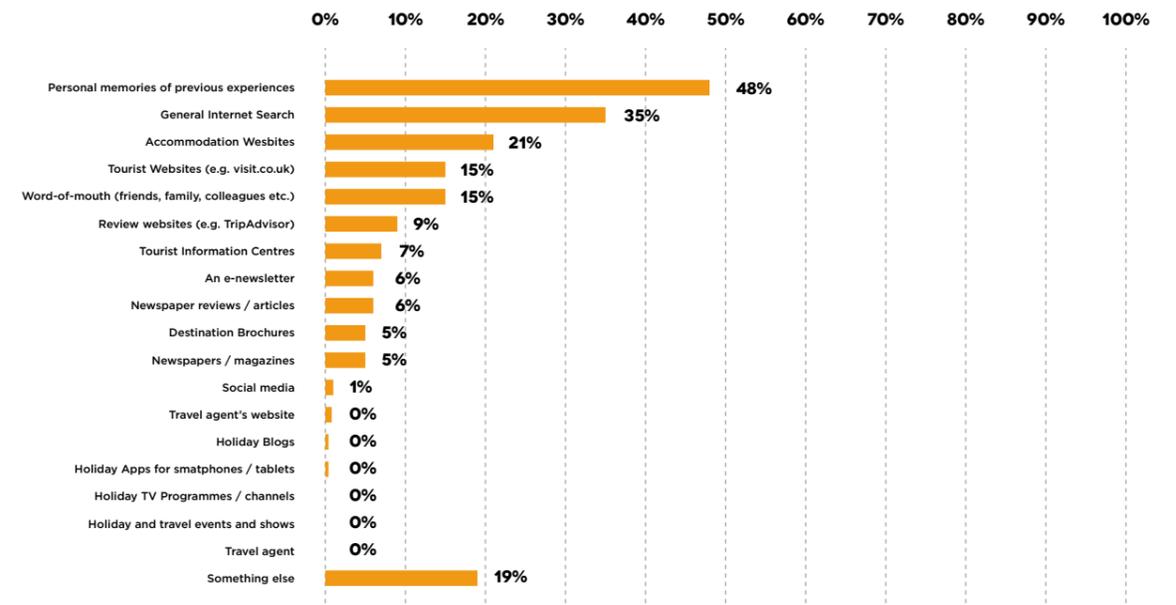
It shows the multi-dimensional nature of the visitor experience, but 'arts, entertainment or cultural event' is the top choice of 68% of respondents. This next set of results, shows the main reason for visiting the

region, again demonstrating the key factor of arts, entertainment and culture as a prime motivator in visiting the area confirming the idea that culture is a driver in bringing people to the area.



PLANNING THE VISIT

A couple of questions asked more about the way that they made their decision to visit (taken from a list of possibilities and an open option if they had a different reason).



This seems to indicate that for the most part they are independent travellers, not coming on packages or part of tours. 'Personal memories of previous experiences' as the top choice also demonstrates that large numbers know the area and are returning either in the short or long term. The internet as a source

of information, especially search engines, is also influential. Amongst the answers given for 'Something Else' were a few which said they had a holiday or second home in the area, recommendations from the accommodation, employer, family and friends, knowledge of the area and websites or brochures.

IDEAS FOR IMPROVEMENT

Asked what would encourage them to visit Norfolk or Suffolk cultural events more often, the responses can be categorised as follows: information/communication, events/programme, the area and transport/access. A selection of the sort of improvements they are looking for is given in this selection.



EVENTS/PROGRAMME

- A sense of occasion and something special
- More events in coastal and smaller towns
- More events throughout the year
- Greater ambition and original constructs
- Better use of towns across the counties. Not just in the biggest towns or the more affluent areas.
- Talks on relevant topics at the locations
- More events in the parks [...] where you can take picnics and for all ages
- More events at weekend as difficult to get to a mid-week event
- More connections with European art and music, more avant-garde input.

INFORMATION/COMMUNICATION

- Single point events calendar
- A central browsable website for all theatres/museums/music venues in the area
- Ease of booking and conveniently compact city centre
- There's lots going on in N&S - some very small venues but interesting and different but you have to know where to look. No one place where you can find info (eg like a Time Out but for N&S)
- By choosing to receive information in advance by email we feel we have a reasonable choice. We would welcome a list of events by category on an overall website provided it was updated
- Single online listing for all music events across all venues
- Receiving regular email updates on upcoming events to allow me to plan ahead
- Free entry, centralised point for information
- The words art and culture drive the public away, not encourage them. Words like exhibitions, music and dancing are what people want to hear even if it is 'art and culture'.
- Knowing about events well in advance, especially if travelling is involved, as I don't drive and rely on public transport
- More coverage in broadsheet newspapers. More sharing of info across arts venue publicity.

THE AREA

- We definitely plan to visit again ... love this area!
- Deals with restaurants and hotels
- More attention to developing the Ipswich waterfront
- 'Bigger names', cheaper prices, better public transport and/or better parking which is free or low priced as even evening parking is getting expensive so tend to street park if I can
- Combine ideas for a day visit which includes an evening at [xxxx] with visiting other places of potential interest earlier in the day. Making it a whole day trip.

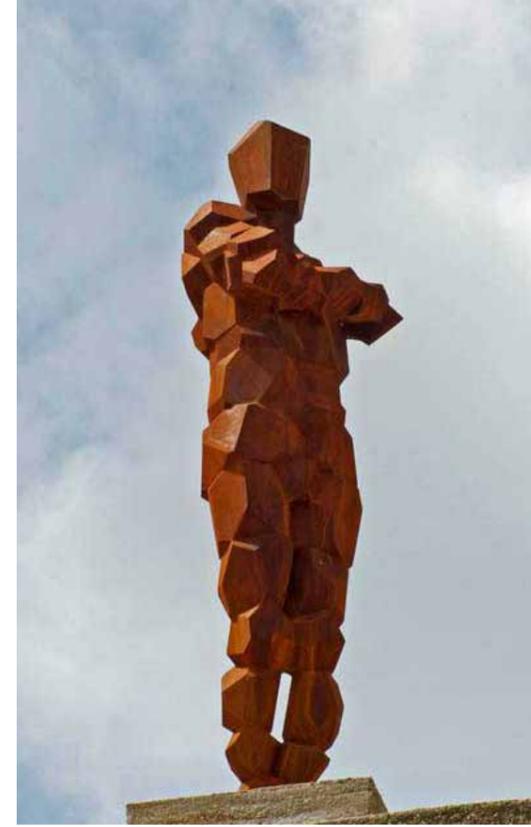
DISTANCE, TRANSPORT, ACCESS, TIME

- Better public transport
- Much better transport links
- Distance is a consideration I guess, especially for evening events
- Precise info on finishing times so as to be able to plan rail journey home
- Travelling distance is the prime determinant
- Living closer to Suffolk. We are 3-4 hour drive away on 'wrong' side of London
- I should spend more time on the internet doing my travel homework!
- It's only the tedious journey from the other side of London that puts us off going more often.
- When I retire I will do more, but working hours prevent me from attending a lot
- Having more time! Maybe in the far off future when I am retired
- Nothing - time and work prevent me doing more - wish I lived in Norfolk!

Many of these comments have already been fed back to the project co-ordinators and this has informed plans for Phase 2.



ONLINE ACTIVITY



Online promotion was an important part of the project. Using Hitwise:AudienceView and social media monitoring, a picture of the online behaviour of the Norfolk Suffolk cultural tourist is possible.

During 2017, for 12 weeks leading up to 7th July, the users of the main arts and cultural organisations which were located outside the East of England were analysed.



USERS: DETAILS AND DEMOGRAPHICS

There were 18,989 unique users over the three month period who went to at least one of the sites above and were from outside the East of England.

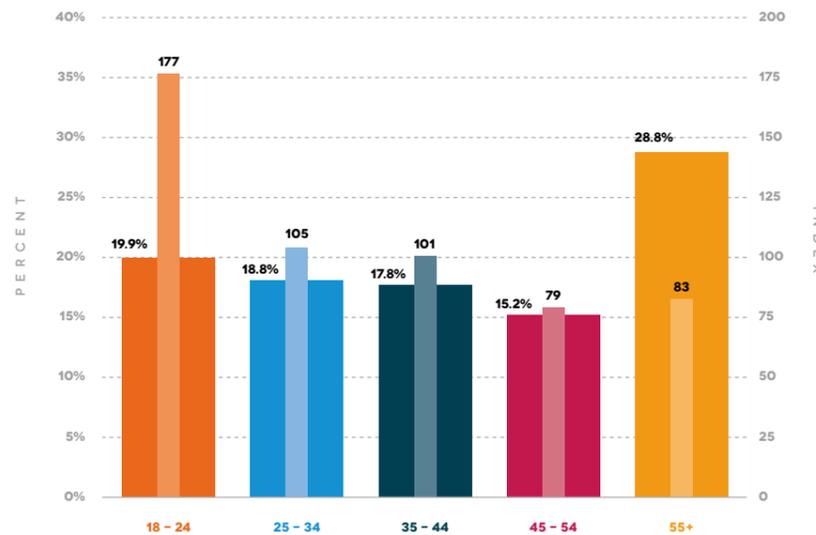
75% accessed these sites using a desktop or laptop and 25% using a tablet or phone

There were high numbers coming from the South East, London and East Midlands, with the East Midlands being the most highly indexed compared to the online population

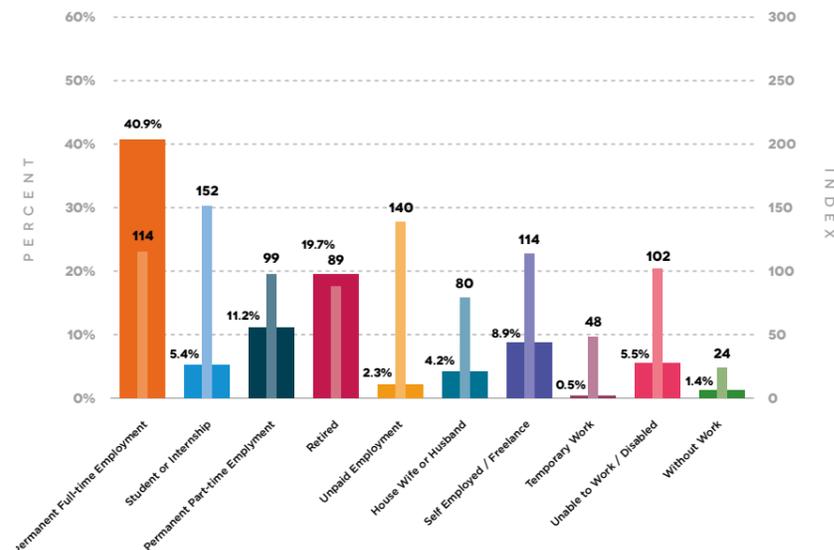
The demographics of these users as identified by Hitwise shows the importance of considering them in a segmented way. The age profile shows the high numbers of people over 55, with the most highly indexed (compared to online population) those

aged 18-24 and the most under-indexed the 45-54 group. [The wide column represents group size and the middle column is the index compared to online population].

- 55+**
LARGEST GROUP
SIZE 5,460
- 18-24**
MOST OVER-INDEXED
INDEX 177
- 45-54**
MOST UNDER-INDEXED
INDEX 79



The occupation profile also shows how the needs of different groups should be considered in attention to cultural tourist online usage.



- PERMANENT FULL-TIME EMPLOYMENT**
LARGEST GROUP
SIZE 7,762
- STUDENT OR INTERNSHIP**
MOST OVER-INDEXED
INDEX 152
- WITHOUT WORK**
MOST UNDER-INDEXED
INDEX 24

ONLINE JOURNEYS

Perhaps the most useful analysis is that of the online journeys themselves, looking at upstream (where people come from before reaching the URL) and downstream (where they go afterwards) statistics.

UPSTREAM ANALYSIS

This is a table of the top sites that users visit before visiting the site in question.

Website	Industry	Traffic Occurrences	Occurrence Share	Unique Users (beta)	Reach (beta)
1 www.google.co.uk	All Industries	74,603	30.73%	17,377	64.18%
2 www.facebook.com	All Industries	31,198	12.85%	6,775	25.02%
3 new sessions	All Industries	30,629	12.62%	6,703	24.75%
4 www.gmail.com	All Industries	16,709	6.88%	3,384	12.50%
5 www.youtube.com	All Industries	9,179	3.78%	2,241	8.28%
6 www.twitter.com	All Industries	6,124	2.52%	1,977	7.30%
7 www.google.com	All Industries	3,579	1.47%	648	2.39%
8 www.google.co.uk/maps	All Industries	2,620	1.08%	1,124	4.15%
9 www.google.com/calendar	All Industries	2,489	1.03%	466	1.72%
10 docs.google.com	All Industries	2,352	0.97%	1,219	4.50%
11 www.wikipedia.org	All Industries	1,718	0.71%	304	1.12%
12 www.netflix.com	All Industries	1,680	0.69%	397	1.47%
13 www.tripadvisor.co.uk	All Industries	1,640	0.68%	385	1.42%
14 uk.search.yahoo.com	All Industries	1,635	0.67%	575	2.13%
15 www.ticketmaster.co.uk	All Industries	1,355	0.56%	168	0.62%
16 www.norwich.gov.uk	All Industries	1,347	0.56%	418	1.55%
17 www.theguardian.com	All Industries	1,236	0.51%	572	2.11%
18 www.soundcloud.com	All Industries	1,157	0.48%	428	1.58%
19 www.linkedin.com	All Industries	1,146	0.47%	436	1.61%
20 www.artsjobs.org.uk	All Industries	1,139	0.47%	412	1.52%
21 www.visitnorfolk.co.uk	All Industries	1,098	0.45%	245	0.91%
22 drive.google.com	All Industries	877	0.36%	305	1.13%
23 www.ryanair.com	All Industries	857	0.35%	165	0.61%
24 www.edp24.co.uk	All Industries	803	0.33%	194	0.72%
25 www.ebay.co.uk	All Industries	789	0.33%	596	2.20%
26 ohnotheydidnt.livejournal.com	All Industries	770	0.32%	134	0.50%
27 norwichartscentre.co.uk	All Industries	741	0.31%	163	0.60%
28 uk.yahoo.com	All Industries	720	0.30%	385	1.42%
29 www.dailymail.co.uk	All Industries	676	0.28%	156	0.58%
30 www.bing.com	All Industries	650	0.27%	285	1.05%

This list is useful to understand how people are navigating to the sites with the search engines, especially Google, but also Yahoo and Bing. Social media, especially Facebook (at number 2), YouTube (5) and Twitter (6) also influential. 'New sessions' (3) means that people have gone straight to the destination site which suggests that large numbers already know the organisations concerned and Gmail (4) probably indicates that people are being directed by email bulletins.

Other sites worth noting include TripAdvisor (13) which is not a surprise for cultural tourism and news sites such as the local EDP (24) as well as The Guardian (17) and the Daily Mail (29).

The highest ranked 'Visit' site is Visit Norfolk (21). The others within the top 100 are: Visit Norwich (35) and SuffolkTouristGuide.com (64). There are cultural organisations in the top 100, but only one is from the region (Norwich Arts Centre).

DOWNSTREAM ANALYSIS

This isn't hugely different from the Upstream Analysis. However, it shows purchase and travel options such as National Rail, Ticketmaster and Google Maps.

	Website	Industry	Traffic Occurrences	Occurrence Share	Unique Users (beta)	Reach (beta)
1	www.google.co.uk	All Industries	61,299	29.87%	13,448	52.69%
2	www.facebook.com	All Industries	33,198	16.18%	7,519	29.46%
3	www.gmail.com	All Industries	17,578	8.57%	3,918	15.35%
4	www.youtube.com	All Industries	10,708	5.22%	3,147	12.33%
5	www.twitter.com	All Industries	7,724	3.76%	2,457	9.63%
6	docs.google.com	All Industries	3,562	1.74%	1,626	6.37%
7	www.google.com	All Industries	2,726	1.33%	698	2.74%
8	www.google.co.uk/maps	All Industries	2,393	1.17%	761	2.98%
9	www.google.com/calendar	All Industries	2,322	1.13%	434	1.70%
10	www.netflix.com	All Industries	2,137	1.04%	545	2.14%
11	www.theguardian.com	All Industries	2,117	1.03%	645	2.53%
12	www.tripadvisor.co.uk	All Industries	1,964	0.96%	383	1.50%
13	www.ticketmaster.co.uk	All Industries	1,597	0.78%	326	1.28%
14	www.bbc.co.uk	All Industries	1,572	0.77%	631	2.47%
15	www.amazon.co.uk	All Industries	1,572	0.77%	519	2.03%
16	www.wikipedia.org	All Industries	1,187	0.58%	439	1.72%
17	www.ebay.co.uk	All Industries	1,143	0.56%	412	1.61%
18	uk.search.yahoo.com	All Industries	1,134	0.55%	542	2.13%
19	www.artsjobs.org.uk	All Industries	1,114	0.54%	367	1.44%
20	www.nationalrail.co.uk	All Industries	973	0.47%	300	1.18%
21	www.uea.ac.uk	All Industries	970	0.47%	399	1.56%
22	ohnotheydidnt.livejournal.com	All Industries	964	0.47%	134	0.53%
23	drive.google.com	All Industries	885	0.43%	210	0.82%
24	www.soundcloud.com	All Industries	877	0.43%	275	1.08%
25	www.matalan.co.uk	All Industries	873	0.43%	286	1.12%
26	www.visitnorfolk.co.uk	All Industries	819	0.40%	126	0.50%
27	www.edp24.co.uk	All Industries	805	0.39%	248	0.97%
28	www.futurelearn.com	All Industries	750	0.37%	278	1.09%
29	www.free.fr	All Industries	737	0.36%	180	0.71%
30	www.mymail.co.uk	All Industries	708	0.35%	127	0.50%

There are also connections made to sites that have further information, background and context, such as Trip Advisor, Wikipedia and Issuu alongside blog based sites such as Reddit and Tumblr. There are also connections with specific areas of interest linked to cultural activity such as Scribophile, OhNoTheyDidnt and Booktrust.

SEARCH TERM ANALYSIS

When a search engine has been used, the following have been the terms most searched for in order (by search share) to reach the site.

	Term	Industry	Unique Users (beta)	Reach (beta)	Search Share
1	theatre royal norwich	All Industries	3,520	8.37%	5.50%
2	norwich theatre royal	All Industries	3,106	7.39%	3.90%
3	norwich castle	All Industries	1,283	3.05%	2.60%
4	theatre royal bury st edmunds	All Industries	721	1.71%	2.14%
5	gressenhall	All Industries	720	1.71%	1.94%
6	norfolk and norwich festival	All Industries	1,080	2.57%	1.55%
7	norwich arts centre	All Industries	1,879	4.47%	1.48%
8	marina theatre lowestoft	All Industries	406	0.97%	1.18%
9	norwich castle museum	All Industries	858	2.04%	1.06%
10	dance east	All Industries	1,000	2.38%	1.04%
11	apex	All Industries	755	1.80%	1.00%
12	theatre royal	All Industries	642	1.53%	0.92%
13	apex bury st edmunds	All Industries	731	1.74%	0.92%
14	norwich theatre	All Industries	842	2.00%	0.86%
15	the apex	All Industries	316	0.75%	0.86%
16	coin.collection at time.and tide museum	All Industries	141	0.77%	0.78%
17	national horseracing museum	All Industries	372	0.88%	0.77%
18	milkshake theatre royal norwich	All Industries	311	1.70%	0.75%
19	wolsey theatre ipswich	All Industries	185	0.44%	0.75%
20	the apex bury st edmunds	All Industries	523	1.25%	0.75%
21	bury st edmunds theatre	All Industries	647	1.54%	0.58%
22	apex bury st edmunds tonight	All Industries	236	0.56%	0.57%
23	wolsey theatre	All Industries	238	0.57%	0.57%
24	apex theatre in bury st edmunds	All Industries	209	0.50%	0.56%
25	marina theater lowestoft	All Industries	358	0.85%	0.53%
26	spiegel tent norwich	All Industries	339	0.81%	0.52%
27	colchester castle	All Industries	184	1.01%	0.51%
28	lowestoft theatre	All Industries	123	0.29%	0.49%
29	arts companies norwich	All Industries	156	0.37%	0.48%
30	norwich festival	All Industries	173	0.41%	0.48%

The search terms leading to the sites are mainly ones which state the names of the venues, festivals and cultural organisations, sometimes in different renditions. Occasionally, the artists, productions or exhibitions will appear in the list, for example Milkshake Theatre (18), Akua Naru (32), Coin Collection at Time and Tide (16), Steven Isserlis (34) and Driftwood Circus (56).



DIGITAL ADVERTISING CAMPAIGNS

Several digital advertising campaigns have used Facebook, Twitter and Google Display Network.

Facebook was the most successful of the social media platforms, closely followed by Google Display Network and then Twitter. As Twitter was not very successful in 2016, this was not continued in 2017. Spring reported that Facebook worked especially well due to its greater options and precision user targeting. This meant that it was possible to develop segmented messages based on the profiling done as part of the

project.

Across all channels we targeted audiences using postcode data (from Audience Finder), ages, and interests (cultural and non-cultural). Over the course of all of these projects, we further defined these target audiences, using the LookSideways Audience Personae as the background for this.

[SPRING REPORT - SEE APPENDIX]

The social media campaigns were one of the most successful elements of the LookSideways-East programme. However, the potential for the click-

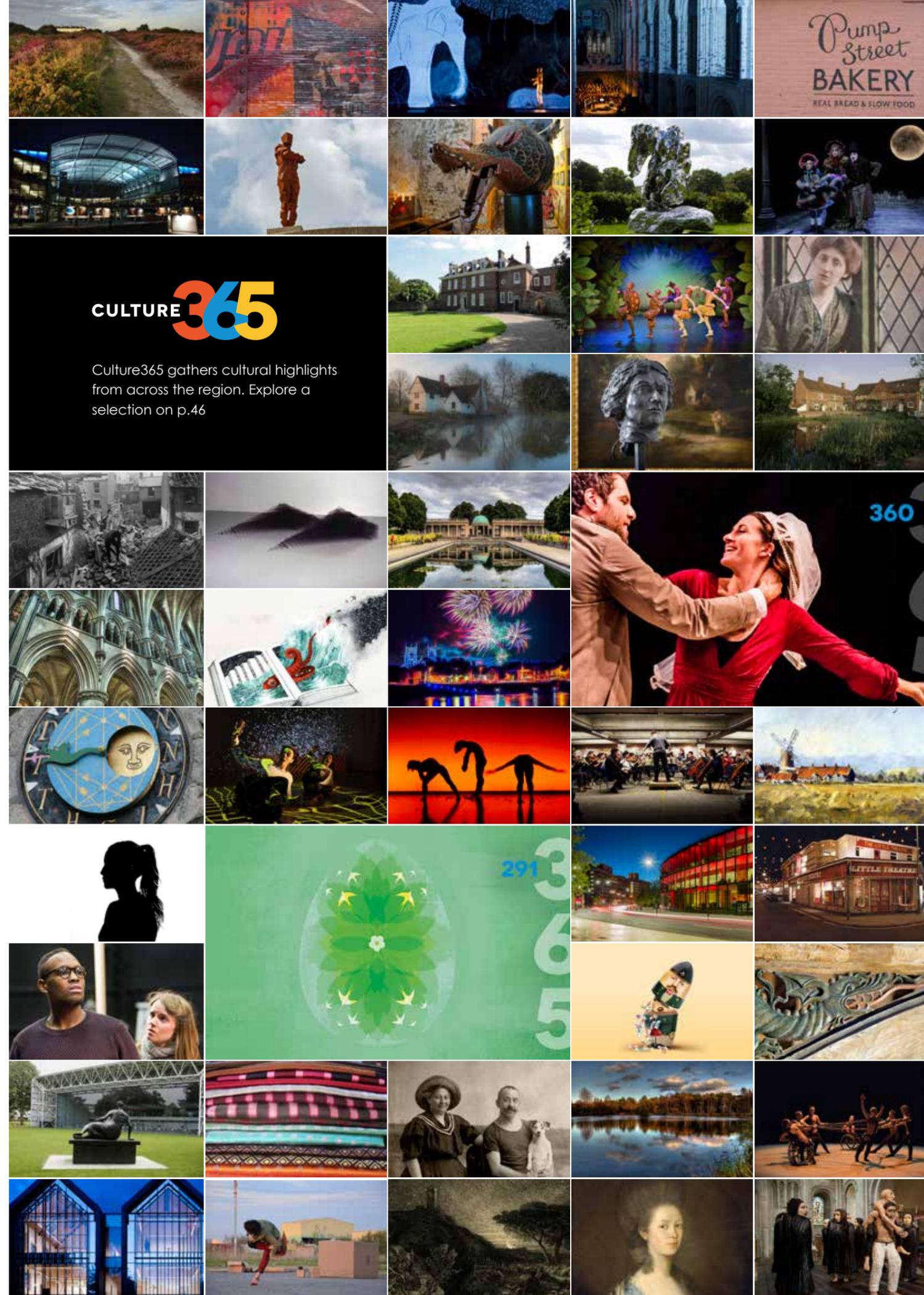
throughs being converted into connections with the DMO and organisation sites and ticket-buying was not fully realised.

CULTURE 365

The Culture 365 campaign (<http://culture-365.co.uk/>) ran from June 2015 to June 2016 online and via social media. It highlighted one event or place for every day of the year with content ranging from The Nutshell Pub in Bury St Edmunds to Sculptor Laurence Edwards to the Pulse Festival.

The text and images were put together by Spring in order to show the diversity of arts and culture in the region and to forge links between culture and tourism, and were based on a variety of content provided by

cultural institutions as well as researched through the internet. It demonstrates how much there is to offer in the region, an important profile raiser given that some people think there is 'nothing' in the area, and is very attractively and succinctly produced. It was set up to run for a year and putting it together was labour intensive hence it could not be continued. The usage and reach is unclear, but it received much favourable reaction from the arts and cultural sector itself with many who would have liked it to continue in some form.



FOCUS GROUPS

During July 2017, The Audience Agency conducted discussions with actual and potential Norfolk and Suffolk cultural tourists from London. The main themes that emerged are given here.



THEMES

The differences between attenders and non-attenders were important mostly in terms of their views of what is available in the region.

However, even the attenders tended to know only about the particular event or place they had been to, with a lack of knowledge about the wider region. All participants were characterised by a lack of knowledge of the area, what it was possible to see and the range

of activities. By the end of the discussion, having seen and discussed what was available, almost all the participants said they would like to visit or return, though they all needed to be given a good reason to go.

KEY OUTCOMES WERE:

The attenders tended to have a connection with the region, through education, work or friend/family contacts. In addition, most of the participants in both groups had some connection to arts, culture, entertainment or media either directly or through family or friends. These connections were influential in what it was they decided to do.

When looking for culture these participants liked cities with contemporary culture that had a certain buzziness.

They were fond of short trips they could fit in round their busy lives – four or five days and often this might include culture.

Perceptions of Norfolk and Suffolk were similar for both groups, though the non-attenders had a more pronounced/extreme idea of what it was like.

Planning trips and holidays for both sets of participants was based on what friends said plus various email lists and social media groups they were signed up to: WeGoPlaces, MeetUp, TripAdvisor, Amazon Tickets, Time Out, Love Theatre.

Non-attenders had a tendency towards thinking it was far away and potentially expensive and therefore it was not considered favourably compared to other places.

The responses to the video and print were more or less the same for both groups. They were acknowledged for showing a different, energetic idea of the region. However, the impression was that you could probably see most of these things in London.

Those who had been to Norfolk or Suffolk spoke favourably of what they had been to, referring to things which were special and distinctive.

CONTRIBUTION TO ECONOMY



Given that 68% of those surveyed gave culture as a reason for visiting the region and 51% as the main reason, it is clear that culture is important as a driver of people to the region.

Whilst not direct evidence, the Mosaic profiling also shows high indices for City Prosperity, Prestige Positions, Country Living and Senior Security groups which are some of the wealthier categories.

It is also possible, based on some of the survey and attendee data collected, to make some projections

for the region. These are not Economic Impact and Activity studies which require more detailed data to construct and are based on the specific idea of the contribution to a local economy.



THE CULTURAL TOURIST VISIT

In answer to the question 'When in the area, did you stay in accommodation other than your own home?' 62% said they did stay somewhere other than their home.

This gives some guide about the numbers of day visitors compared to short visits, being therefore something like a 60/40 split.

When asked about the type of accommodation they stayed in, 66% of these (i.e. 66% of the 62%) said they stayed in paid accommodation with 28% staying with friends and family and 6% other.

Of those staying in paid accommodation, the mean number of days they spent in paid accommodation during the visit was six (assumed to be five nights).

A further question asked what else they did in the area (see Audience Behaviour section above). This showed that, for example, 62% ate in a café or restaurant in the day, 59% ate in a café or restaurant in the evening, 46% went shopping and 21% went sightseeing, all of which involve spend in the area.

VISITOR SPEND CALCULATION

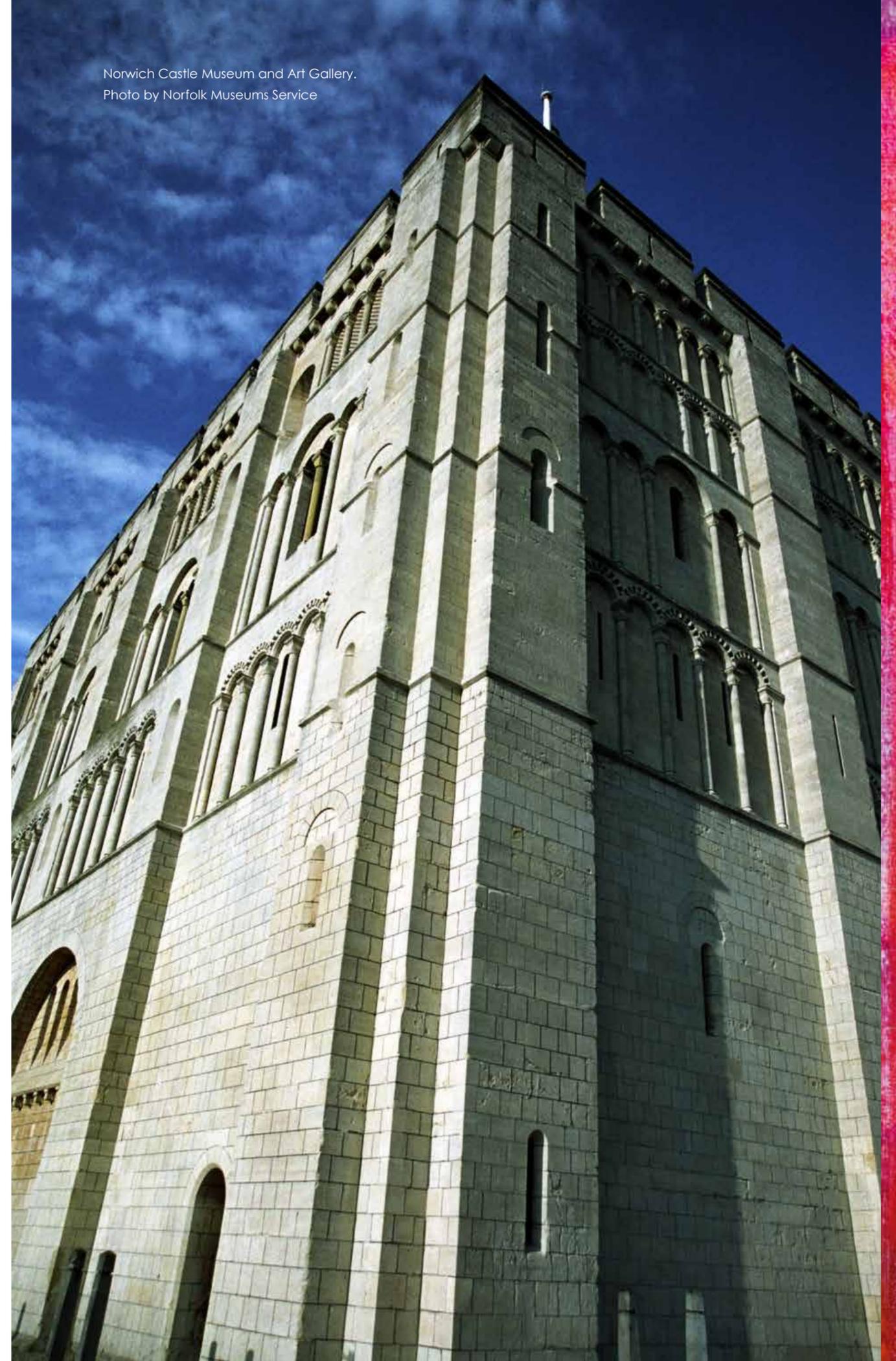
These calculations are based on combinations of the headline figures and the survey responses. They should be taken with caution as they involve scaling up and are based on all visitors with culture as part of their visit, not just those who are driven specifically to attend. On the other hand, some of the spend estimates are conservative and it should be noted that the 75,000 cultural tourists figure is based on visits to the main arts and cultural organisations (not the wider cultural, heritage, entertainment offer).

This is based on a fairly high number of accommodation nights for those in paid accommodation and as it is a percentage of a percentage, it is a small sample. We also do not know exactly how many days people are staying with friends and family.

Day Visitor	£25 per person per day
Visitors staying friends/family	3 nights @ £25 per person per night/day
Visitors paid accommodation	5 nights @ £75 per person per night/day
Number of cultural tourists to main organisations in region	75,000 per year
Number of day visitors	$75,000 \times 40\% = 30,000$
Number of visitor days staying friends/family/other	$(75,000 \times 60\%) \times 34\% \times 3 = 45,900$
Number of visitor days staying paid accommodation	$(75,000 \times 60\%) \times 66\% \times 5 = 148,500$
Spend per year day visitor cultural tourists	$30,000 \times 25 = £750,000$
Spend per year friends and family cultural tourists	$45,900 \times 25 = £1,147,500$
Spend per year paid accommodation	$148,600 \times 75 = £11,145,000$
Spend per year cultural tourists	£13,042,400

According to these calculations, the spend of cultural tourists to Norfolk and Suffolk is £13m a year.

Norwich Castle Museum and Art Gallery.
Photo by Norfolk Museums Service



REFLECTIONS AND RECOMMENDATIONS



Successful cultural tourism strategies are difficult to achieve. They need to be long term plans pursued rigorously and with patience. They are usually co-operative ventures between partners in culture, tourism, government and business and this can be a difficult process, because they have their own missions, aims and working styles. However, LookSideways-East has navigated such challenges and emerged at the end of Phase One with a secure partnership, a clear idea of what has been achieved and ambitions for what is still to be achieved.

It is difficult to prove a causal link between this activity and its consequences for cultural tourism within a relatively short period of time. However, it is possible to use some of the contextual and connected factors. For example, there is an increase in cultural tourists, the profiling and geographical results are consistent with the campaigns conducted, and the surveys and focus

groups provide useful feedback about current and potential audience views. Spring's report, alongside the discussions in the operations group and LEP Cultural Board meetings, also provides an indication of which aspects have been successful.



CONCLUSIONS

This project shows that arts and culture in Norfolk and Suffolk is attractive to cultural tourists. There are many people travelling to the region, with the majority of these being motivated by the cultural offer itself. They are from the more highly engaged parts of the population and the 'art' itself is a big part of what it is they like.

Perceptions of Norfolk and Suffolk are deep-rooted. Therefore, the basic premise of the LookSideways-East project; to look at the type of person attracted, where they come from and what it is they are interested in, is a sound one. It is a better and more efficient use of resources than putting out blanket messages.

The project shows that collaborative working is essential and not just a 'feel-good flag to fly'. The social media campaigns and online activity are good evidence of this, because an advert on Facebook is only as good as the place people 'click-through' to, so user journeys have to flow and reach a place where information is available and decisions (such as booking tickets) can be easily implemented.

Itineraries and campaigns that are customer rather than product-oriented also require imaginative partnership working. Beyond provision of information, the better cultural tourism strategies around the world have worked out how visitors plan, make decisions and behave when in the area, therefore leading to routes for them to follow. As the word cloud showed, 'variety' is a key word for the Norfolk Suffolk cultural tourist, so they need to be guided towards the wider range of activities on offer beyond the one event they know about.



Wild Works, Wolf's Child at Norfolk & Norwich Festival.
Photo by Steve Tanner



RECOMMENDATIONS

Continue the excellent partnership working, building trust and working together to create something that cannot be accomplished singularly, using the collective expertise and intelligence to produce an imaginative successful project.

Develop a twin track approach which works both as targeted campaigns and at a wider level, which seeks to address negative perceptions, especially looking at a larger geographical reach in some of the 'warmer cold' spots. The former will need primarily online, print and advertising methods and the latter mainly PR and media methods.

Create clear reasons to visit, linking culture with place and time. Signposted arts events need either to be unavailable locally (eg. in London), to be distinctive linking them to Norfolk and Suffolk or to provide attractive additional benefits.

Use existing connections of cultural tourists with the region. As 30% of attenders who stay overnight are with family and friends, this idea could be exploited further. The project needs to help residents to bring people to the area and introduce them to its culture.

Use existing cultural connections and partnerships outside of the area. Most cultural tourists are high attenders at their home locations so partnerships with arts and cultural organisations, if workable, would provide potential connections.

Use a segmented approach throughout the project. For example, media and PR campaigns need to be segmented. The media consumption and habits of the key profiles are known and therefore this should inform media activity to make it more efficient. This will most likely involve moving away from mainstream media to consider the influence of bloggers, vloggers and international recommendation sites.

Develop itineraries of different types based on customer segments rather than products, taking into account time spent in area, budget, connections based on interest, and accommodation and subsistence requirements. This should be done in conjunction with the DMOs who have the capacity to make connections which go beyond the culture itself. These itineraries need to be presented in a way that gives a degree of choice, even if that may be as much a perception as a reality (i.e. there are underlying itineraries they are drawn to).

Related to this, the ability for the cultural tourist to find out what is available was revealed in the audience research. This involves being able to search and explore different ways of finding out about the event based on customer need.

There is a desire for more events beyond the big, known festivals and venues in places beyond the main cities and sites and at different times of the year. In particular, there appears to be capacity for more events for Trips and Treats and Home and Heritage profiles which have a significant social factor to them as well as the art itself. These may well be family oriented.

IDEAS

These ideas would need more discussion and thinking through. They are slightly more adventurous but they are presented as starting points for debate.

The Norfolk Suffolk cultural tourist is an intelligent, knowledgeable person and the project can take risks to encourage them to cross the threshold for the first time and to return again. The Culture 365 initiative is a good example of the way that the project can appeal to the 'intelligent discerning visitor' and the focus groups demonstrate that many London attenders would be open to the idea that Norfolk and Suffolk could be the 'new' Brighton or Bristol. This involves encouraging them to think they have discovered it before others.

The international cultural tourist has not been a focus for the project, but there are connections to be made, both cultural and practical. Stansted Airport is one of the busiest airports in Europe and sits on the edge of region. The ports in Suffolk provide direct links to the Netherlands and beyond; and there are many international tourists visiting London who are not currently visiting the region.

According to the focus groups, popular music is connected to and not separate from other ideas of culture. Some expressed a desire for an imaginative range of rock/pop music events in the region that would be attractive and linked to culture and place.

Linking cultural tourism to the cultural history of the area would help to implant the idea more firmly in people's minds. For example, picking 5-10 artists, writers, composers etc that are always referred to in Norfolk Suffolk material, using repetition to remind people of the cultural inspiration of the area, would help to embed an idea of what is special about Norfolk and Suffolk. It is also worth considering set wordings that go with the brand, working up the idea of 'looking sideways' in the sense of something alternative or not being conventional and providing a sense of identity.

This project is rare compared to many similar initiatives in that it has leadership that is ambitious and positive and constantly seeking change. It is a collaboration of 'the willing' and very much a 'give and gain' model in that it relies on organisations to take part in the project in order to make it work. There have been differences of opinion, lively discussions and difficult decisions made along the way and the project that is emerging in the second phase is the stronger for it and has much potential.



LOOKSIDWAYS
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