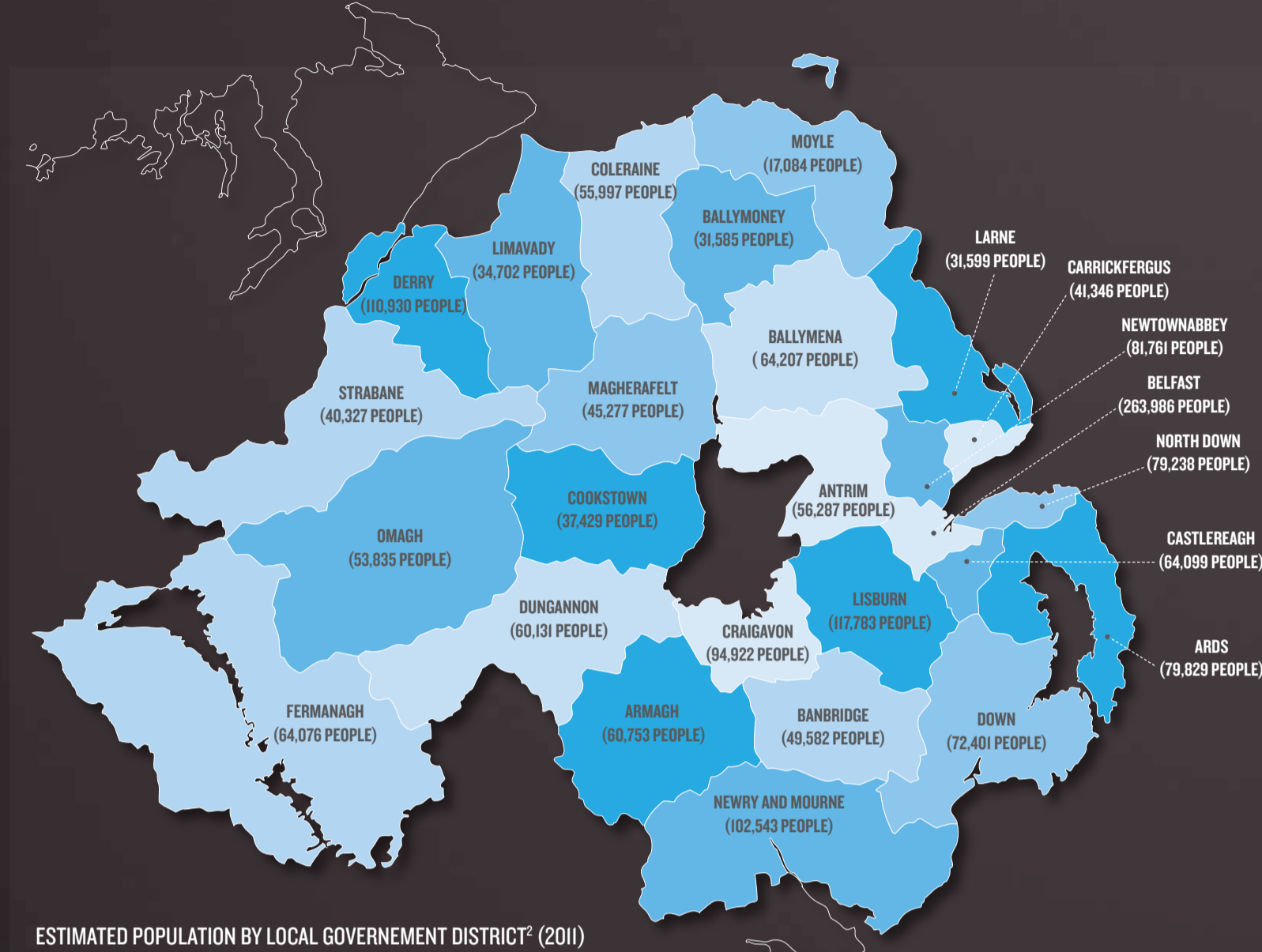
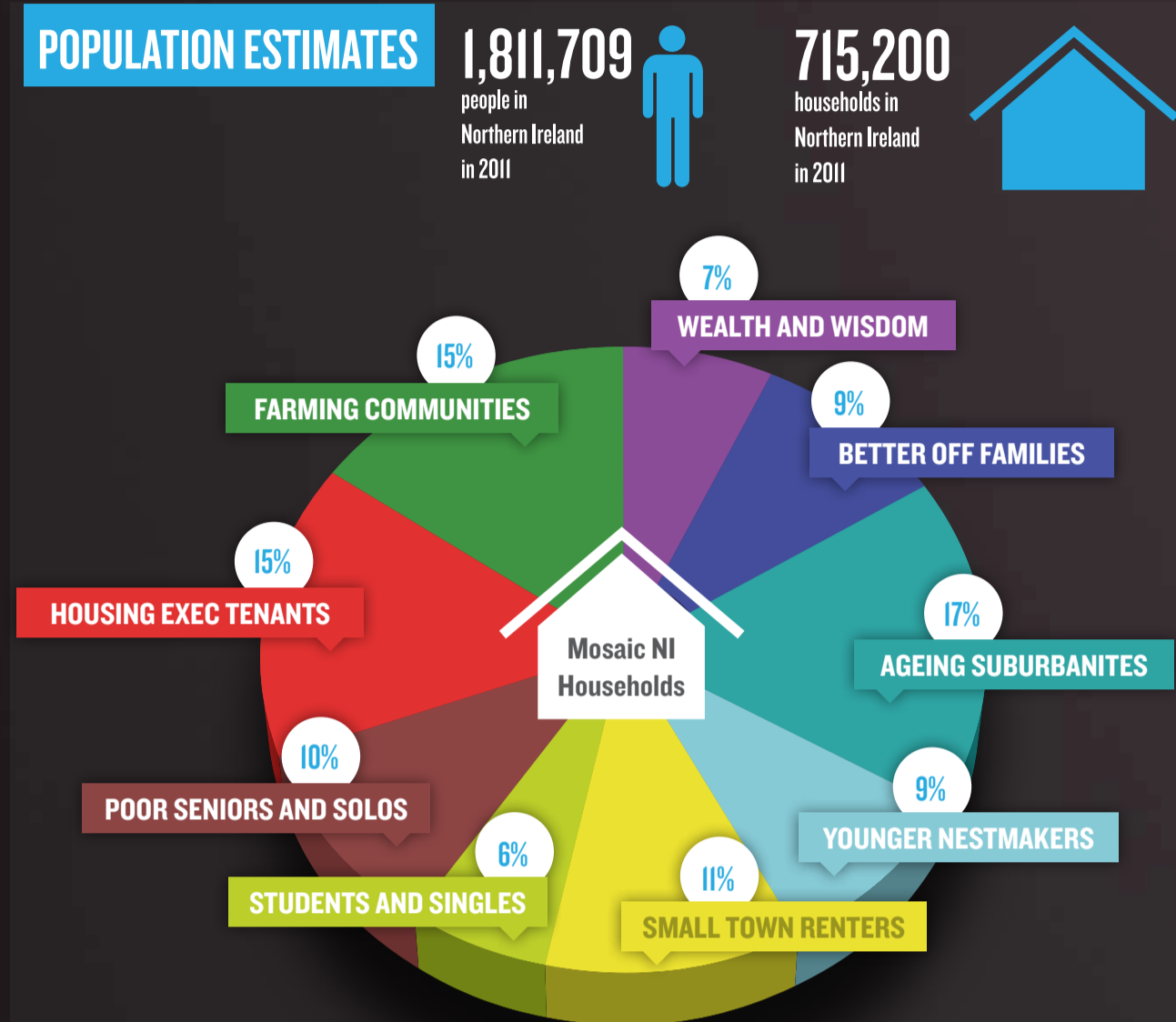


WHERE'S YOUR AUDIENCE?

FOR ADVICE AND PRACTICAL HELP WITH UNDERSTANDING, FINDING AND EFFECTIVELY COMMUNICATING WITH YOUR AUDIENCE, EMAIL RESEARCH@AUDIENCESNI.COM OR PHONE 028 9043 6480



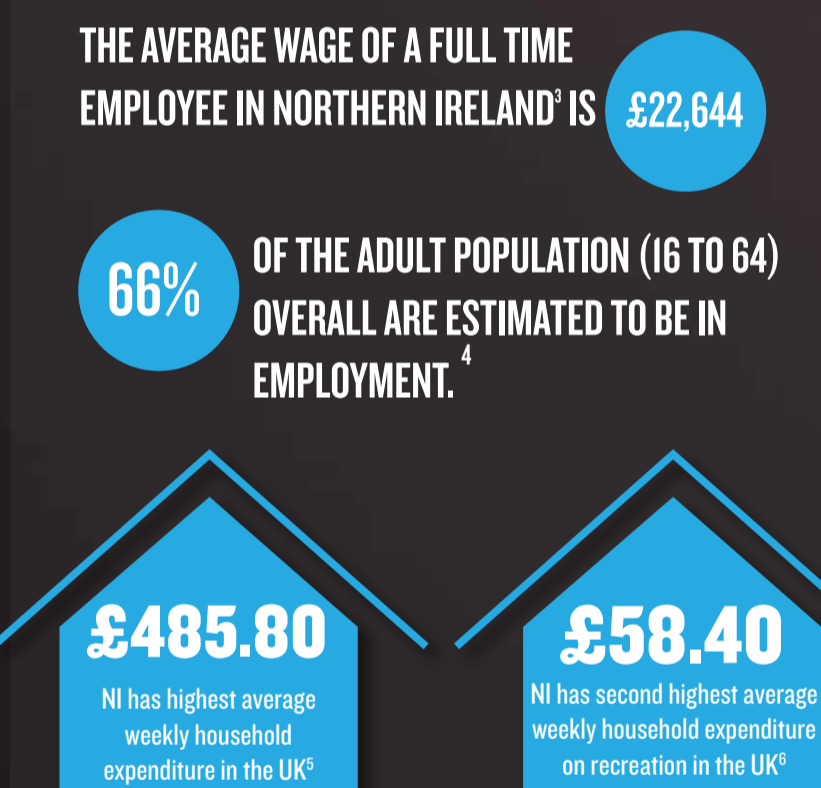
A POPULATION OVERVIEW



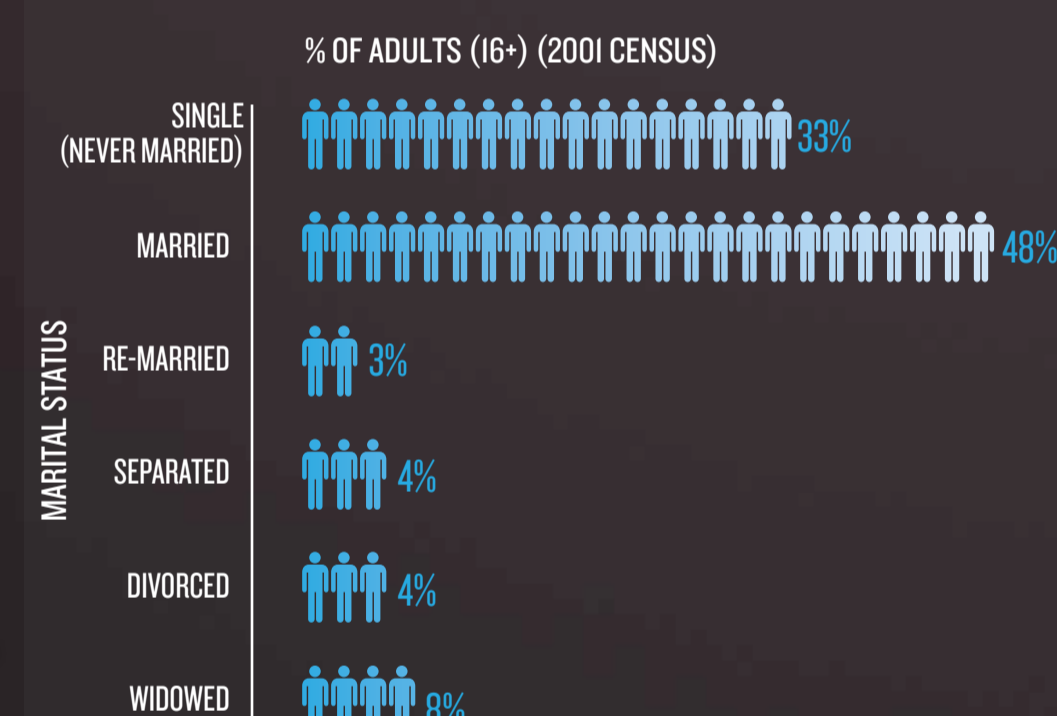
AGE²



ECONOMY & SPENDING



MARITAL STATUS⁷



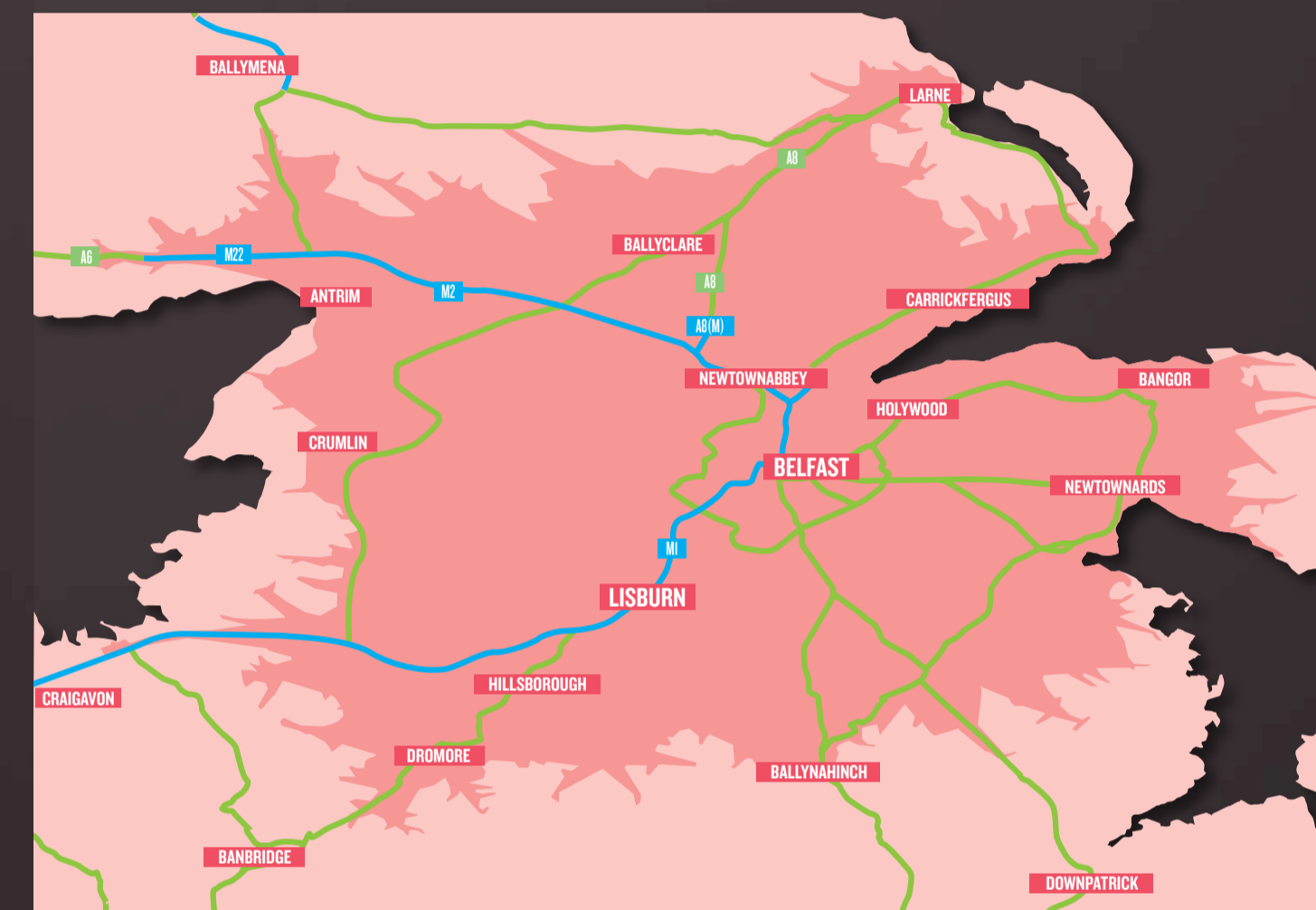
LOCATING YOUR AUDIENCE

What is a catchment area? It's a "geographic area around an arts facility which is the source of the largest and most important proportion of actual users and attenders."⁸

The core catchment for an organisation is based on where 80% of customer records come from, which normally equates to a 30 minute drivetime around the performance venue although larger venues will have catchments closer to 40-45 minutes while smaller venues will be closer to 20-25 minutes.

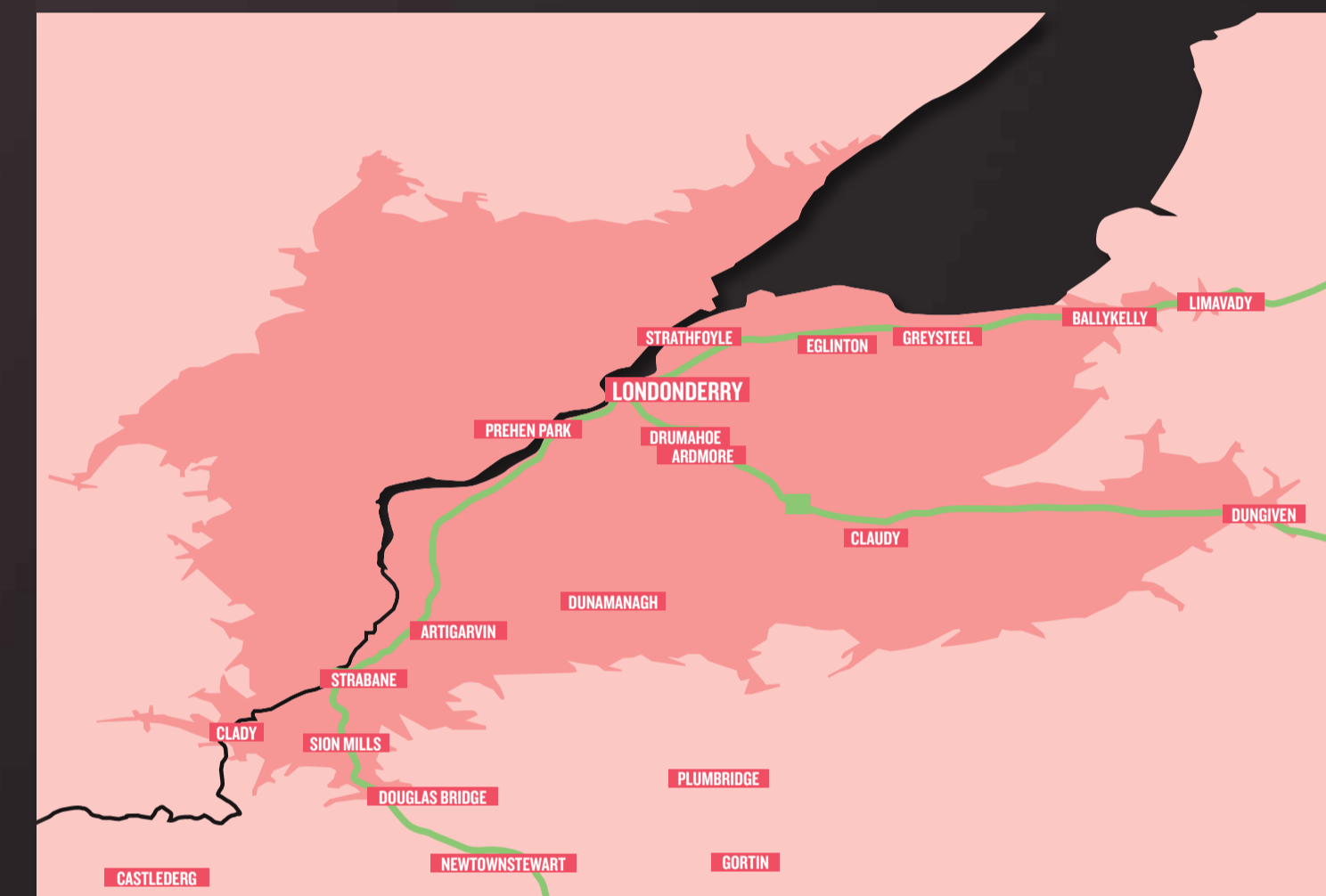
A typical Belfast catchment area:

A standard 30 minute off-peak drive time from Belfast city centre extends as far as Larne, Antrim, Crumlin, Dromore, Ballynahinch, Newtownards and Groomsport.

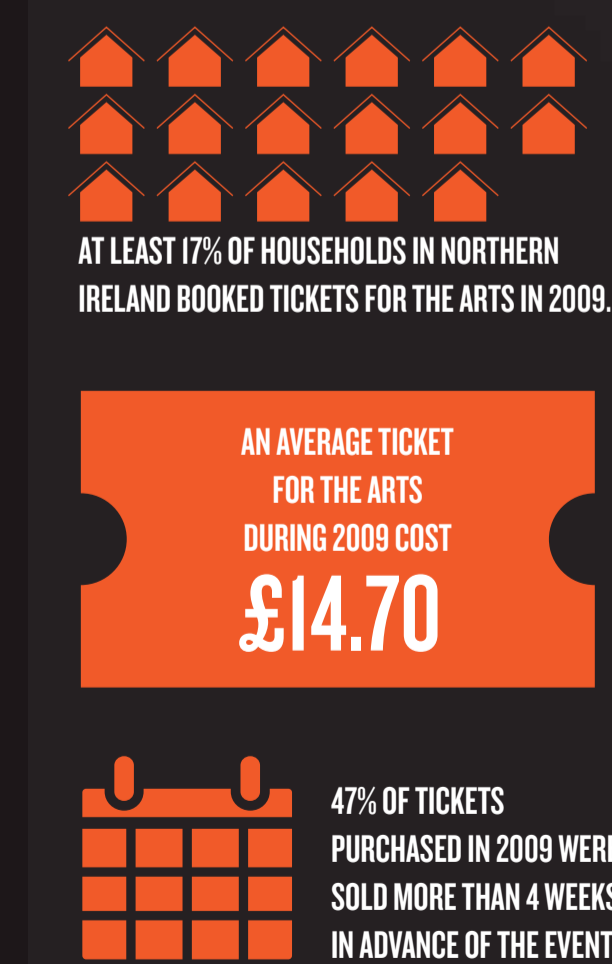


A typical Derry/Londonderry catchment area:

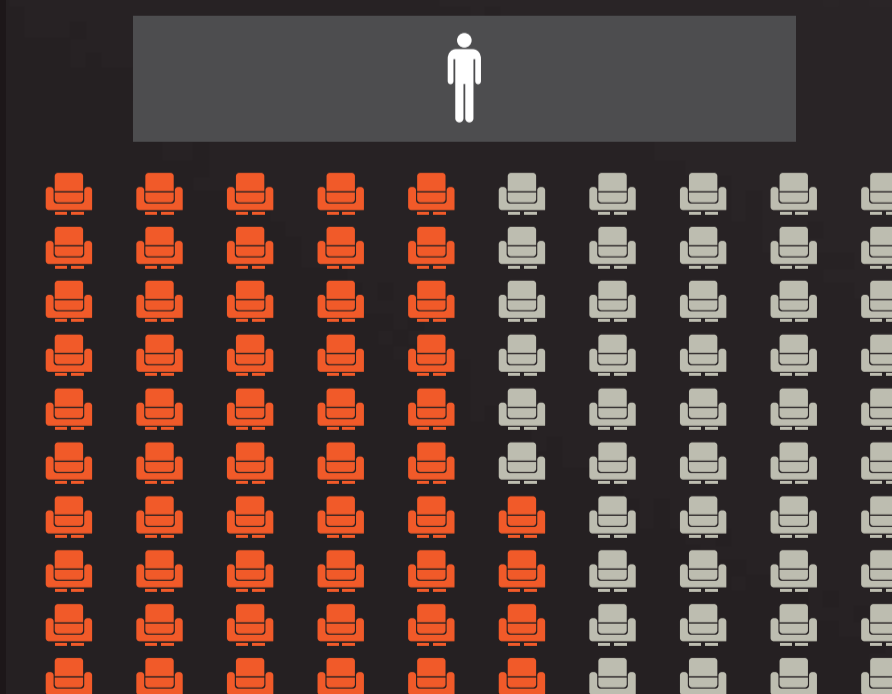
A standard 30 minute off-peak drive time from Derry/Londonderry city centre extends as far as Limavady, Dungiven and Douglas Bridge and across the border into the Republic of Ireland.



CUSTOMER BEHAVIOUR⁹



IF ALL OF THE HOUSEHOLD BOOKERS FOR THE ARTS IN 2009 WERE SEATED IN ONE BIG AUDITORIUM, 54% OF THE SEATS WOULD BE FILLED WITH BOOKERS RETAINED FROM 2007 AND/OR 2008.



65% OF BOOKERS EACH YEAR ONLY ATTEND ONE SHOW PER YEAR.

ON AVERAGE, ARTS ORGANISATIONS SHARE 38% OF THEIR OWN BOOKERS WITH OTHER ARTS ORGANISATIONS.



STAYING IN TOUCH

DIRECT MAIL

Direct mail remains one of the most popular methods for an arts organisation to communicate with their audiences.

The benchmark for average response rates to a direct mail campaign in the UK across a 10 year period was 5%.¹⁰

Royal Mail figures indicate that 55% of theatre goers and 54% of art gallery visitors are responsive to direct mail.¹¹



NEWSPAPER CIRCULATIONS

Around 15% of people in Northern Ireland use newspapers as their main source of local news.¹² The Belfast Telegraph has the highest circulation per issue in Northern Ireland.

Publication	Circulation Per Issue ¹³
Belfast Telegraph	67,353 copies
Belfast News	48,504 copies
Irish News	45,531 copies
News Letter	24,346 copies
Derry Journal (Fri)	18,105 copies
Derry Journal (Tue)	16,456 copies
Derry News (Thu)	6,193 copies
Derry News (Mon)	5,940 copies
Londonderry Sentinel	4,410 copies

If you're interested in finding out the circulation for your local paper, visit www.abc.org.uk.



E-MAIL MARKETING

E-mail marketing is a cost effective way of driving traffic to your website, sharing online media and growing online sales.

Typical Campaign Response Rates	Direct Marketing Association (2009) ¹⁴	Audiences NI (2009/10) ¹⁵
Average Open Rate	22%	30%
Average Click Through Rate	10%	6%

If you're interested in getting started with e-marketing, Audiences NI are offering free e-marketing services and support to all our current members and to all Arts Council of Northern Ireland ASOP clients.



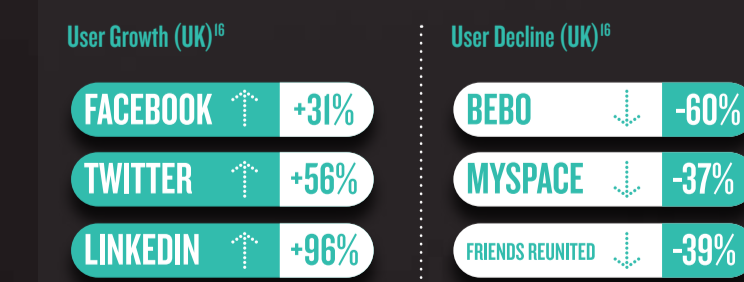
INTERNET USAGE IN NORTHERN IRELAND¹²

Every residence and business in Northern Ireland can access high speed broadband and 70% of households in Northern Ireland have a broadband connection. Only 2% of households still use a dial-up connection.

In the UK, the average person spends 14 hours online at their home PC or laptop per month, and 75% of households in Northern Ireland use the internet to purchase goods and services online.

SOCIAL NETWORKING

Social Networking allows organisations to have an ongoing dialogue with their customers and helps generate word of mouth. 37% of the households in Northern Ireland contain at least one person using a Social Networking site.¹⁶



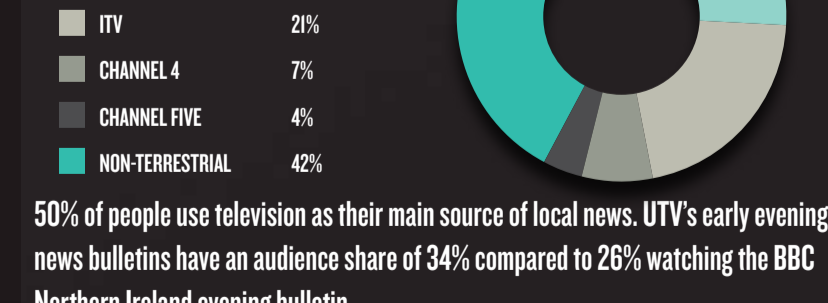
MOBILE PHONES

88%

88% of NI households own a mobile phone, but only 14% of NI households are accessing the internet through their mobile phones.¹⁷

TV¹²

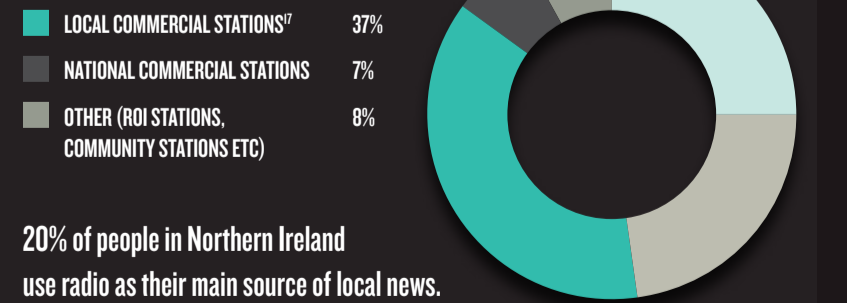
92% of people in Northern Ireland watch TV each week, for an average of 24.5 hours per week.



50% of people use television as their main source of local news. UTV's early evening news bulletins have an audience share of 34% compared to 26% watching the BBC Northern Ireland evening bulletin.

RADIO¹²

Nearly 90% of the adult population in Northern Ireland listen to the radio each week, for an average of 22 hours per week.



20% of people in Northern Ireland use radio as their main source of local news.

¹Source: Population Projections 2006-2021, Neighbourhood Statistics (NISRA) Website: www.nisra.nisra.gov.uk. Crown copyright material is reproduced with the permission of the Controller of HMSO.

²Source: Annual Survey of Hours and Earnings 2010, Department of Enterprise, Trade and Investment website: www.deti.ni.gov.uk. Crown copyright material is reproduced with the permission of the Controller of HMSO.

³Source: Family Spending Report 2009, Office of National Statistics, www.statistics.gov.uk. © Crown copyright 2010. Published with the permission of the Office of Public Sector Information (OPSI).

⁴Source: KS04 Marital Status, 2001 Census, Neighbourhood Statistics (NISRA) Website: www.nisra.nisra.gov.uk. Crown copyright material is reproduced with the permission of the Controller of HMSO.

⁵Source: Audience Audit and Audience Tracker 2009, Audiences NI, www.audiencesni.com.

⁶Source: "Direct mail receipt and response - day of week analysis", Mail Media Centre, www.mmc.co.uk.

⁷Source: "Communications Market Report: Northern Ireland 2010", Ofcom, www.ofcom.gov.uk.

⁸Source: 2009 average calculated from "National Email Benchmarking Report Q4 2009", Direct Marketing Association, www.dma.org.uk.

⁹Source: Population Projections 2006-2021, Neighbourhood Statistics (NISRA) Website: www.nisra.nisra.gov.uk. Crown copyright material is reproduced with the permission of the Controller of HMSO.

¹⁰Source: Labour Market Survey (Jul - Sept 2010), Department of Enterprise, Trade and Investment website: www.statistics.deti.ni.gov.uk. Crown copyright material is reproduced with the permission of the Controller of HMSO.

¹¹Source: Table A37, Family Spending Report 2009, Office of National Statistics, www.statistics.gov.uk. © Crown copyright 2010. Published with the permission of the Office of Public Sector Information (OPSI).

¹²Source: "An A-Z of Commonly Used Terms and Protocols relating to Box Office and Audience Data", Stephen Cashman/Audience Data UK, www.audiencesuk.org.

¹³Source: "Consumer insights - direct mail and the leisure and entertainment sector", Mail Media Centre, www.mmc.co.uk.

¹⁴Source: "Total Average Net Circulation / Distribution Per Issue (4 Jan 2010 - 4 Jul 2010)", ABC, www.abc.org.uk.

¹⁵Source: "E-marketing Benchmark 2009/10", Audiences NI, www.audiencesni.com.

¹⁶Source: "Communications Market Report: UK", Ofcom, www.ofcom.gov.uk.

¹⁷Source: "Downtown Radio, Cool FM, CityBeat, U105, Five FM, Six FM, Seven FM, Q97.2, Q102.9 and Q101.2; as listed in "Communications Market Report: Northern Ireland", Ofcom, www.ofcom.gov.uk.