

# Insight TUG – Nottingham – 17<sup>th</sup> June

## Minutes

### Segmentation: Behaviours or Attitudes – David Reece (Baker Richards) & Becky Loftus (RSC)

- It's all about getting the best of both audience behaviours and attitudes
  - Behavioural – Tess data
  - Attitudes – via survey info
- Once you have segments, it's good to flag and target them within your database
  - But based on survey info, you'd need to survey everyone on database in order to tag
    1. You will never reach 100% responses
- Like a cake
  - Behavioural – sponge
  - Attitudinal – icing
    1. Survey of each behavioural segments
  - Further research – cherry
- RSC are about to launch 6 segments
  - 2 pre-existed
  - 4 new, inc. bargain hunters
- Segmentation is the understanding that all are individuals, but share a group of characteristics
- 3 forms of data that form your segments
  - Attitudinal
  - Demographics – usually supplementary
  - Behavioural – direct interaction through ticketing system
- NB: The factors used to build a segment must each make a difference to the organisation's financial performance
- It's always good to know lifetime value of a customer along with their frequency
  - Recency/frequency/value is perfect analysis to do in order to gauge this
  - Good to align this with churn
  - Usually a positive relationship between frequency and churn with higher frequency correlated with lower churn
- English National Opera – they have 8 segments
  - One segment they identified frequent cheap tickets in their history. It turned out to be their most valuable segment
  - Led to Secret Seat scheme - cheap ticket unallocated and are seated on the night
- RSC segmentation project
  - Brief was to review existing Segmentation model which was aging and to implement new
  - Stages
    1. Discovery – fieldwork research cross-dept

2. Analysis - analysed existing data, RFV, needed a consistent way to categorise productions by genre (good to tag each production), cluster and factor analysis
  3. Design – started with basic categories (members, donors, once only, London etc.) looking at these groups based on 5 main types of behaviour (customer, ticket, member etc)
    - What is clustering – have many variables, put data into a program that spits out groups of customers that share similar characteristics
    - What variables are useful? – frequency, location, genres, advance, venues, pricing index (based on average yield for shows), discounts, members and donors
    - RSC had 3 cluster solutions produced (a 5, 6 and 7 cluster solution)
      - They chose 6 cluster solution
  4. Implement
    - Implemented in Segmentation Engine with tags sent back to Tess
    - Segmentation Engine provides key metrics for each segment and tracks their behaviour, showing movement between segments over time
- What about oncers? Things to consider are:
    1. Oncers make up a significant proportion of database, although contribute less to tickets and income than multits
    2. When to let them go? How long between 1<sup>st</sup> and 2<sup>nd</sup> visit of multits?
    3. Segment oncers based on potential to fall into a segment
  - Once a customer has a tag in Tess, they are scheduled to receive a survey to determine their attitudinal segment
    - Medium length survey based on thoughts and engagement to other arts
    - Gauges perception against the hard behavioural data
    - Also get a sense of their preferences
    - Can also ask about travel and accommodation
  - Migrating Swan – the RSC segment
    - Noticed they like new writing, but low awareness about the “The Other Place” which is a stage that is focused on new writing
    - Not loyal to RSC, and likely to travel far
  - Family Night Out – the RSC segment
    - Book once a year and in advance, not top price tix
    - Survey found that not all are families, but they are going to ‘family’ shows
    - Found out ticket price is a barrier to their attendance
  - Next
    - Launch with other depts
    - Strategic working
    - Tracking highlights and lowlights of using segments
    - Adding in segmentation to Tessitura reports and other surveys, e.g. on productions
    - Comms tools for wider across company, e.g. videos

## **Sara Vergara (Royal Albert Hall) – Insightful Interactive Dashboards**

- 3 years ago, built tools to ensure teams can make data based decisions
  - They realised that they are sitting on gold mine, that could be implemented more strategically across teams
- The team asked colleagues: What would you like to know about shows/audiences?
  - Categoricalised answers to: sales, audience profile, performance quality (feedback)
- Had multiple reports in Tess to answer Qs, but often in multiple locations
- Also have dashboards on Power BI
  - Some teams were using these dashboards, but there were becoming oversaturated with multiple dashboards doing the same thing
- Idea behind building the Insightful Interactive dashboards: to bring analytics from the database, to the insight professionals within each team
  - A lot of tools had been created in various places, the plan is to make it more efficient and streamlined
- Objective was also to improve monitoring and communications of KPIs
  - Dashboards needed to be relevant, consistent, understood and accessible
  - Need to find the measures that can be monitored cross-departmentally
- 3 main data points that inform KPIs and measures: Tess, Artifax, Snap Surveys
  - The desire is to get all data in the same warehouse
  - Have KPIs based on various demographics – but this data lives in surveys
  - Ticketing preferences come from database
- To monitor sales and comparing these is tricky as there is such a variety of shows at RAH
  - So sales curves will be vary
- To measure campaign success, they look at engagement with emails and newsletters, and its relation to sales
- Customer feedback gathers
  - Their opinion on what they visited outside theatre, plus NPS
  - Open ended Qs are coded, these categorise their experience and help with feedback to diff departments
- Dashboards (in Power BI)
  - Filters are at the top so that viewers can filter to specific performance
  - Nearest train station is tracked, to inform the outdoor campaign
  - Dashboards setup for comprehensive overview on preferences, demographics and feedback, and then one for booking patters
  - Sales, no dashboards yet but use graphs in excel
    - Dream is to move this across soon
  - Campaign assessment for A/B testing dashboard list emails that converted into bookings
    - Inc graph that shows value of content created

- Feedback dashboard, show feedback from NPS to open ended
- Each dashboard is relevant for specific teams
  - FOH can filter feedback to just visitors on a certain date
- Next step
  - Communicate cross org to avoid miscommunication
  - Make fully accessible
  - Provide drop in times for training and development

## **Erin Koppel & John Jakovich – Tessitura Analytics**

- BI Initiative – went to the community and asked what you wanted for your org
  - For analytics spent 6 months fact finding
  - Found 7 main points
- Making data driven culture w Tess Analytics
  - Pre-built out of the box dashboards, using most features and assumed widgets needed for decision making
    - Season dashboard, top level. Elements are interactive too
    - Fundraising progress dashboard. Good for looking at pipeline and projection of income
    - Membership sales dashboard. Acquisition, recruitment and retention
    - Can drag and drop certain widgets if like a certain layout
    - 3 production sales. Some are jump to dashboards, that take you to constituent level
  - Interactive filtering
    - Click a certain element and trigger dashboard filters to that element
      - Can drag to select multiple elements
      - Means that viewers can change the view and filters at their own rate
  - Drill into data
    - Select element, and within that you can filter further so that you can analyse further all within one dashboard
  - Create your own dashboards
    - Starting from pivots and change visualisation
  - Custom formulas
    - Can create excel like and change format and Calculation of data
  - Sharing dashboards
    - Based on user groups and different levels of editing based on user group
  - Pulse data alerts
    - Indicate an alert based on a certain measure or target being hit
    - This all adds to your pulse dashboard to see alerts in one place
    - Notification bell
  - Save to list
    - Can see constituents when 'jump to' then can save as a list
  - Advanced Pivot tables
    - With conditional highlighted and data bars (like in Excel)
  - Visual Data Exploration
- 3 phases
  - Getting started

- Guide appears on TN.com, mainly for viewers
    - Reviewing the forums and documentation, and check these first before diving in
    - Forum: dynamic pricing templates. Share dashboards that can be exported from Tess analytics
    - TN User Groups: [TAFFY](#), [TAMATO](#) (Jess @ Roundhouse, co-chair), [Analytic Coffee](#) (submit agenda items online, most technical)
      - Can focus into what each user and builder needs
  - Personalise
    - Duplicate pre-built
    - Create your own
    - Share and use in meetings
  - Adopt and thrive
    - Use it to make decisions, analyse deep and flexible
    - Engage community
    - Encourage training
    - Iterate the use of the dashboards, evolve and evaluate them regularly
- Tip, limit to 10 widgets per dashboards
- Tip: use text widget to describe the dash board is doing
- V15.1 can analyse on price layers, which helps with dynamic pricing
- CRM = Customer Relationship Mastery
  - PLATFORM
  - PEOPLE
  - PROCESS
- Focus on link between data and decisions
  - Need to ensure data inputted is relevant and accurate to what is needed to analyse
- Customer engagement roadmap
  - Maps journey from first timer to repeat booker to members and donors
  - Each milestone is measurable by data
  - Let go of laggards who are stuck at first time for 3+ years
- Business roadmap
  - Need to understand KPIs as something you'd invest money into improving
    - Not a collection of random metrics
- Tracking the unknown to the known
  - Engagement maps are different for certain teams
  - Don't bombard to encourage along the roadmap (5 ways to ruin relationship)
  - Instead measure what is happening organically
  - Use tool to influence what's happening in organisation
- Customising Analytics
  - Made it so that you don't need to customise
  - Built most common TStats customisations
  - Same constituent summary tables over
- Adding custom dimensions in v16
  - A custom table and custom cubes
  - These customisations will survive upgrades
  - John at SMG is a case study for this. RAMP, worked with Tess on this
- V16

- Constituent interactions- plots out on a time line
- Chord chart – looks at crossover
  - Can put one or two dimensions of data
  - Could show pivot data behind it