

London insights



What's new in 2015

The quantity of data we can draw on is bigger than ever

The depth of that data in describing audiences

Which means The Audience Agency can give you

- A deeper understanding of London audiences
- The Tools to identify your organisation's best prospects
- Understand not only who your audiences are. Discover who they could be.

What is Audience Spectrum?



- Audience Spectrum is a segmentation of the UK population based on people's cultural habits.
- Audience Spectrum tells you about both behaviour *and* location. No other segmentation model in the cultural sector can do this.
- Made up of 10 segments with distinct profiles located by postcode.
- Audience Spectrum is FREE as part of Audience Finder

www.theaudienceagency.org/audience-spectrum



Metroculturals



Commuterland
Culturebuffs



Experience
Seekers



Dormitory
Dependables



Trips &
Treats



Home &
Heritage



Up Our
Street



Facebook
Families



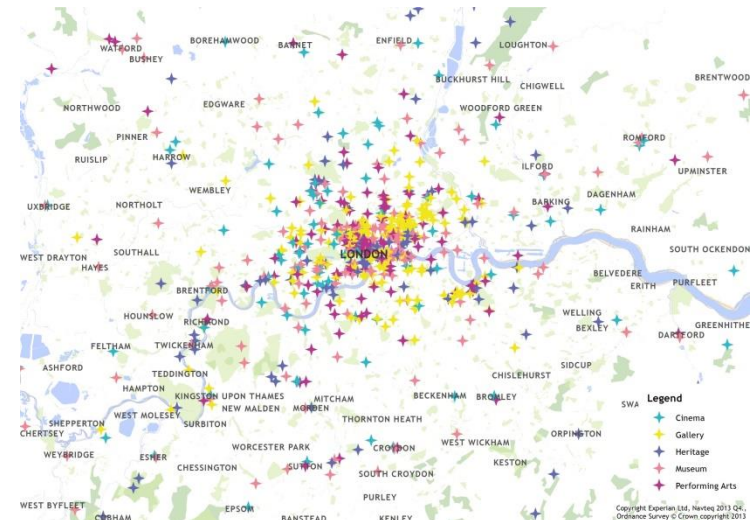
Kaleidoscope
Creativity



Heydays

Why is London different?

- London offers a wealth of cultural choice
- Which can be exciting or overwhelming
- Either way, Londoners of all segments engage more in terms of frequency and/or range of engagement than their equivalents elsewhere in the country



Key questions when segmenting London

- What is the scope of the audience potential?
- What are different segments like?
- Can we break them down for deeper insight?
 - Geography
 - Cultural preferences
 - Loyalty
 - Lifestage and Lifestyle
- What are the opportunities to increase engagement?
- What can we do differently?

Where is the data coming from?

By combining two datasets we can achieve a depth of insight about current and potential audiences

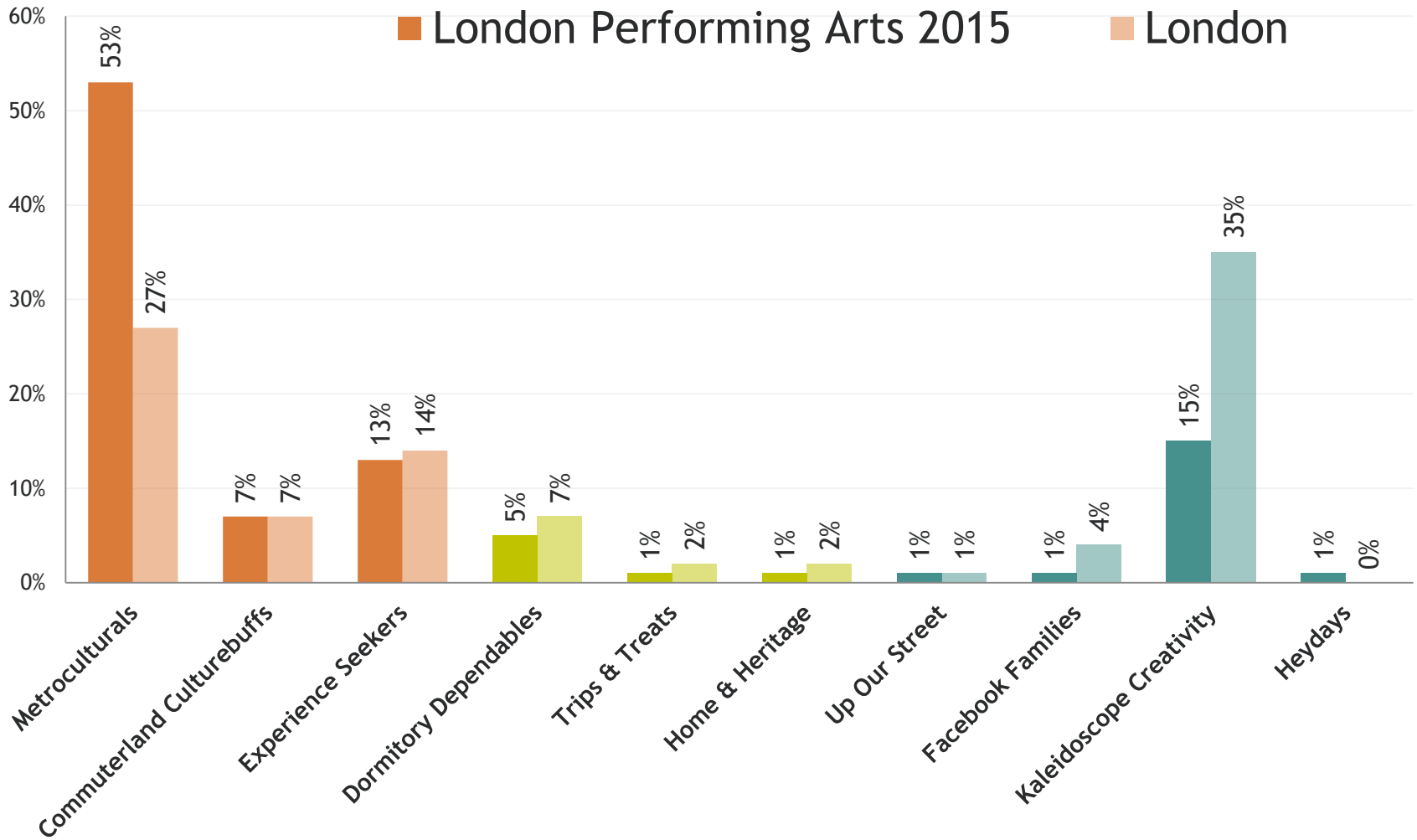


The largest cultural dataset in the world



Gives levels of cultural engagement and demographic, lifestyle and consumer data along with Population data for demographics and local context

What London currently looks like



Focus on Metroculturals & Kaleidoscope Creativity

Metroculturals (highly engaged)

- 27% of performing arts attenders from London
- 53% of London`s population
- London audiences are over-represented compared to the overall population

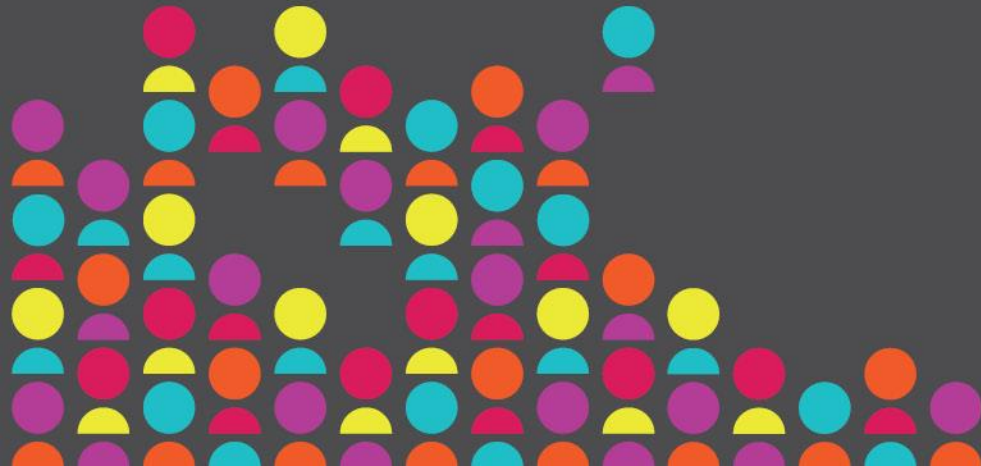
Kaleidoscope Creativity (lower engaged)

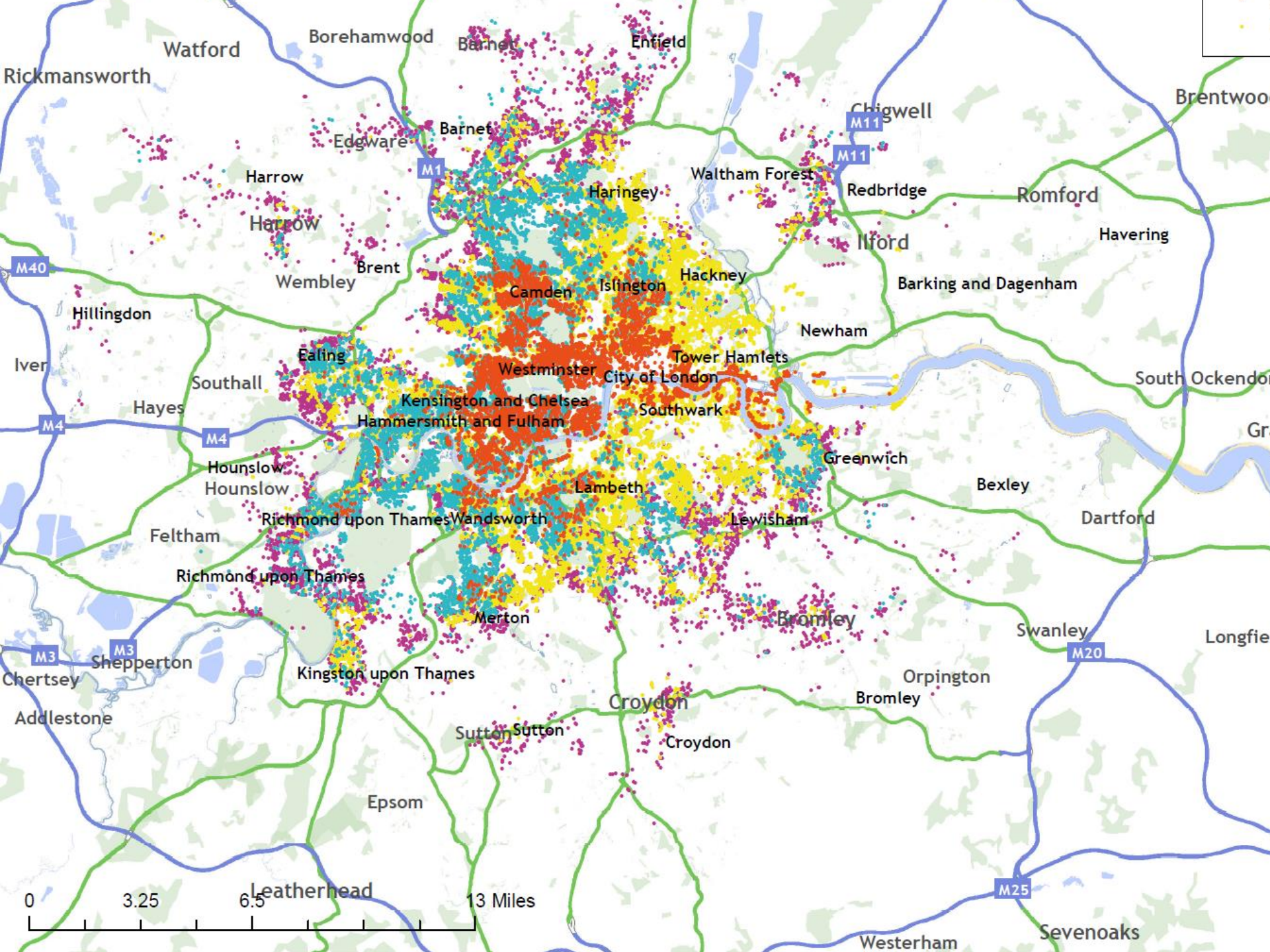
- 15% of performing arts attenders from London
- 35% of London`s population
- London audiences are under-represented compared to the overall population

What does this mean practically?

- Positioning - what offer will different audience groups respond best to?
- Effective communications - which channels, messages?
- Build partnerships - to extend reach and enhance the offer?
- Relationship-building - efficient CRM strategies?
- Developing content - depth, type, platforms?
- Developing formats - experience, longer/shorter, formal/informal?

Metroculturals





Metroculturals Overview

- 1.8 million adults in London
 - 27% of the population = 1 in 4 of households
 - 50% of them are in our growing datasets
-
- 54% of **performing arts** data in London
 - 43% of **visual arts** attenders in London
 - 46% of **museums** attenders in London
 - 60% of **independent cinema** attenders in London

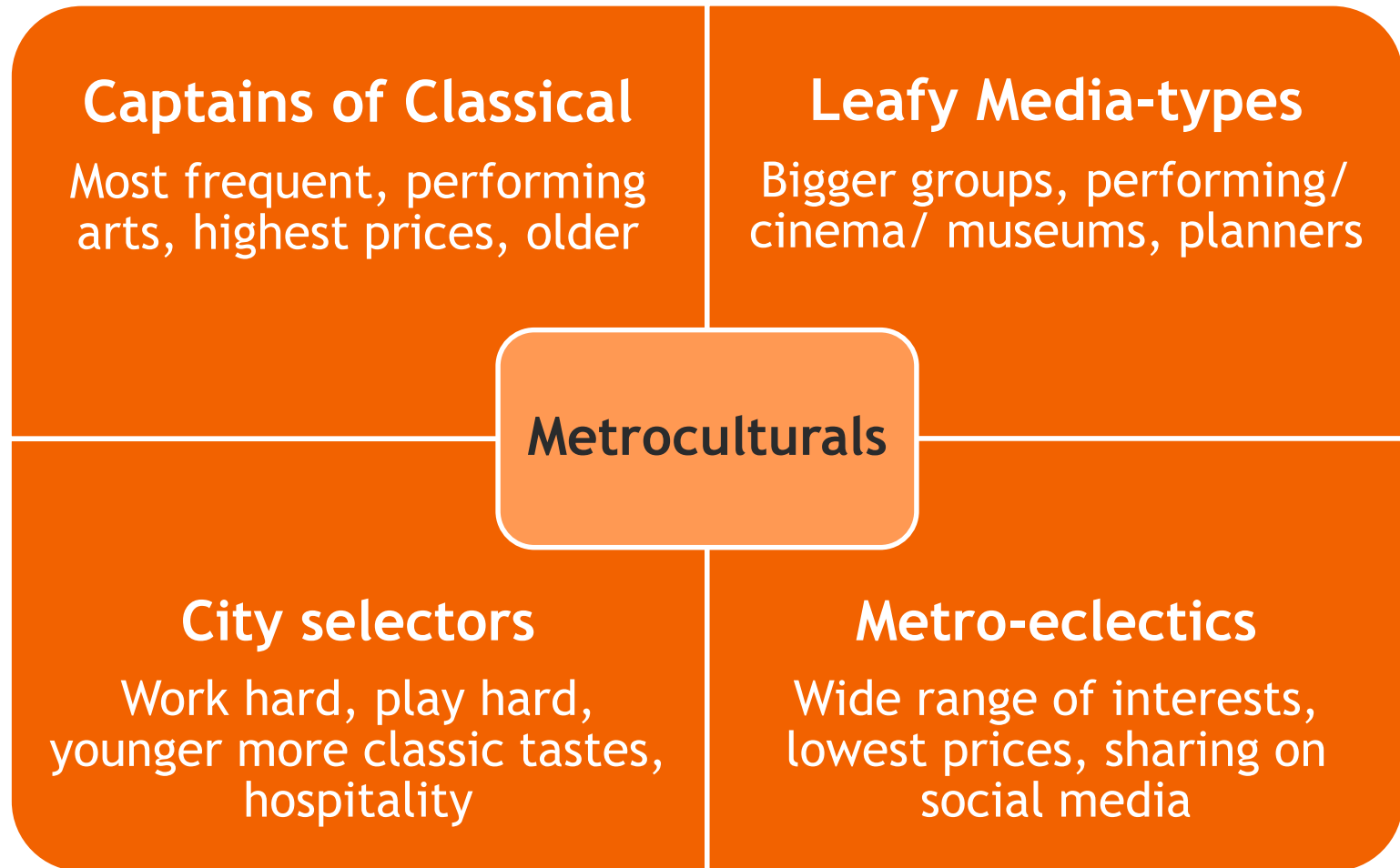
What are they like?

all ages, all ethnicities, international, living across London - looking out for new stuff, wanting to be entertained, hang out with their children, connected - word of mouth and the media, high website usage, some more social media than others...

in and out of cinemas, museums, visual arts, all kinds of performing arts, West End...

holidays, waitrose, highly educated

Metroculturals exist in 4 groups



Understanding the segment groups



Leafy Media-types

- They live furthest from organisations
- The Majority book 31-90 days in advance
- They use websites and social media for finding out more and planning
- Most likely to attend in larger groups
- Highest proportion have families
- Highest for cinema and museum attendance
- Infrequent users of Facebook and social media

What really matters to Leafy-Media Types?

GEOGRAPHY

- Leafy-Media Types live on average 2 miles from their local venues
- Recognise the important connection between life-stage, lifestyle and where you live
- Think logistics for travel and practically
- Due to group size think packages and small group offers
- Key difference between local and central London offer

Metro-eclectics

- They will try everything
- Mainly Contemporary (not classical, opera or ballet)
- Paying the least
- Booking later
- 'Specialist' knowledge ie latest trend
- Seek intellectual stimulation
- Largest group
- Younger
- Share everything on social media

What really matters to Metro-eclectics?

RANGE AND FREQUENCY

- Tells you about likely ‘loyalty’
- Informs messaging - ‘try it once’, ‘do something different’, ‘it’s new’
- Target on ‘interest’ level not just product
- Seek out partners to increase reach due to this group’s venue promiscuity
- Social media campaigns are vital
- Sharable content is a must

Captains of Classical

- They are frequent visitors and attendees
- Higher prices are not a barrier
- Advance booking choices and benefits are essential
- They will come in larger groups
- Mostly attend Classical, plays/drama
- Cross-venue - artform, locality, larger
- Can be demanding - they want the full package
- Generally older
- Social media is for business only if at all.

What really matters to Captains of Classical?

LONG TERM RELATIONSHIPS

- Membership - they want benefits, especially early booking
- Frequency - they want to know, understand and trust an organisation.
- This leads to advocacy, on your behalf
- Introducing a friend is important for this group
- Venue choice across artform/sector and locality
- They have a wide portfolio of attendance across genre, local, large/national, West end

City Selectors

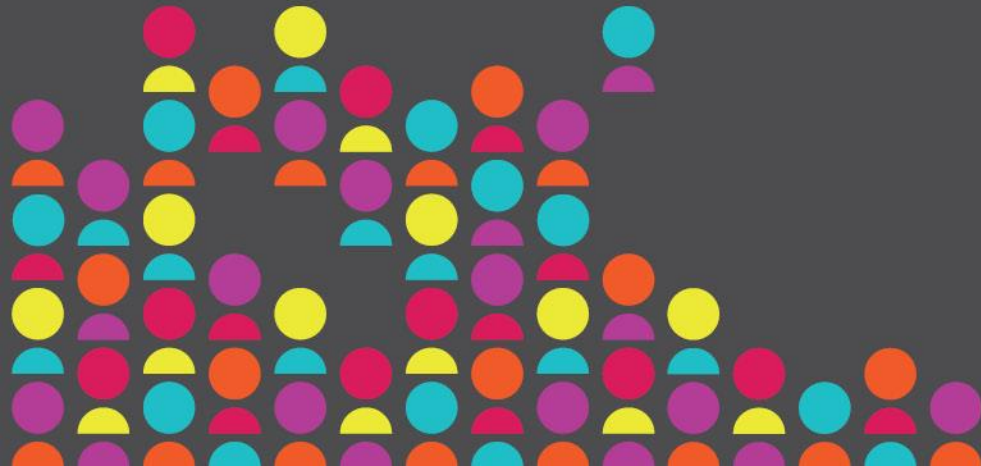
- They are younger and child-free
- Successful city workers
- They see themselves as international in scope
- Least likely to come with more than 2 people
- They live closest to venues as they have the means
- Single venue choice due to locality
- More classical / traditional in choices
- First to have latest gadgets

What matters to City Selectors?

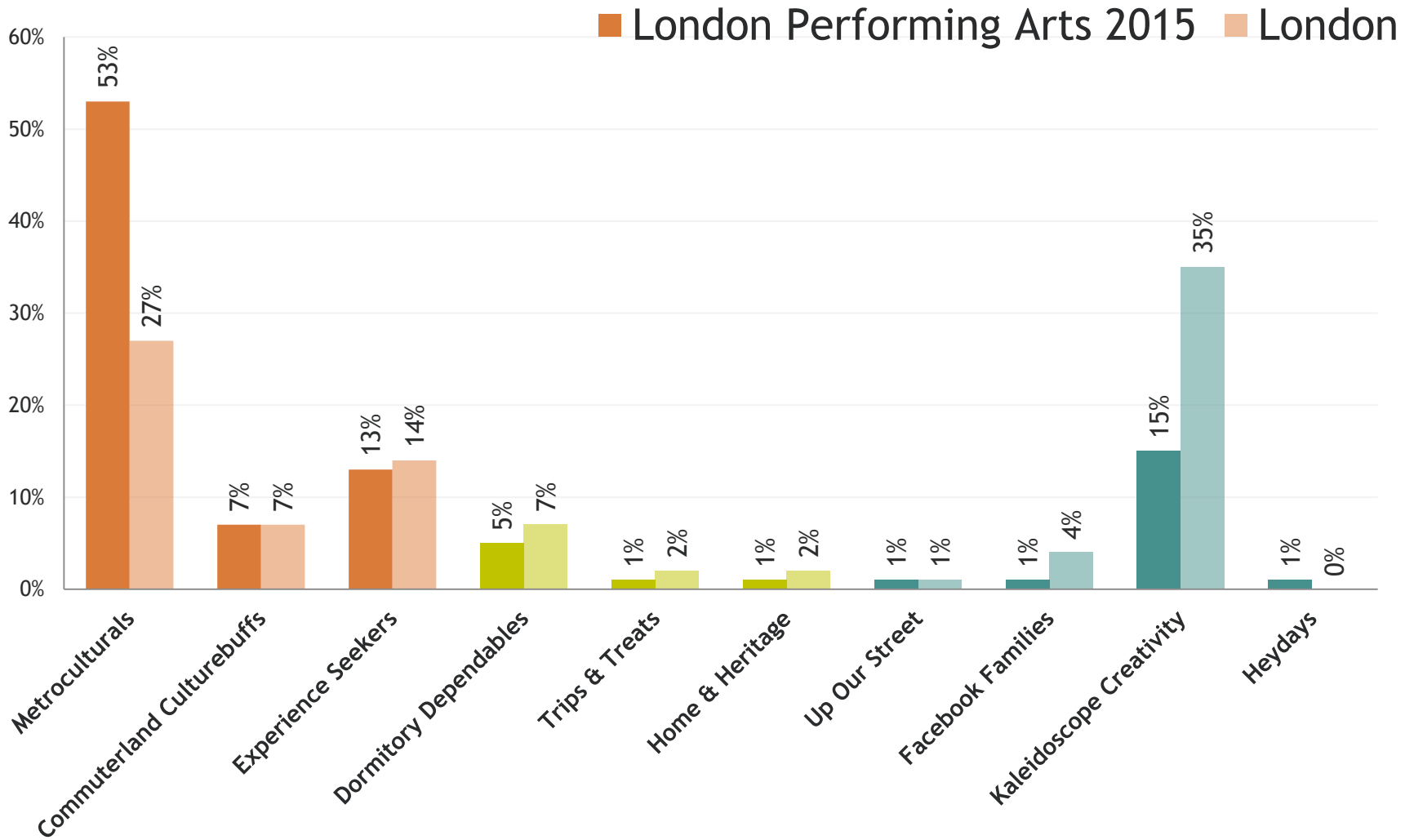
LIFESTYLE MATTERS

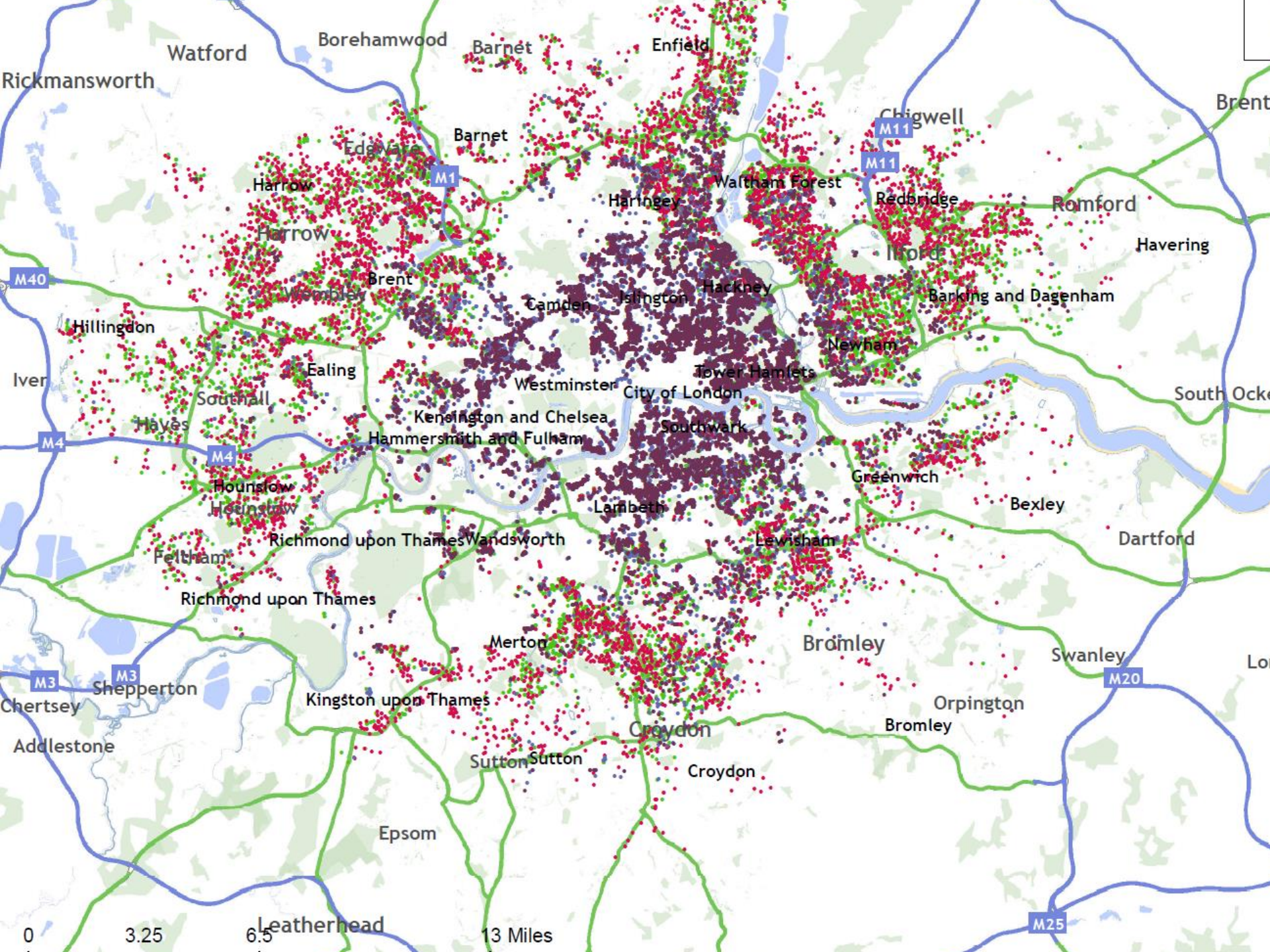
- They work hard and play hard
- Position yourself as premium, they can afford and want the best
- Hospitality in an event situation is important
- Corporate partnerships are ideal for audience growth opportunities
- Classical, or rather Conservative, choice in programming
- You must be exclusive and a 'must see'

Kaleidoscope Creativity



Audience Spectrum





Kaleidoscope Creativity

- 2.3 million of the population
 - 35% of the population
- 15% of **performing arts** data in London
- 16% of **visual arts** attenders in London
- 22% of **museums** attenders in London
- 14% of **independent cinema** attenders in London



Kaleidoscope Creativity .v. Metroculturals

Similarities

- Age range
- Mostly within 6 miles of centre
- Level of specialist knowledge
- Sources of info
- Websites for logistics

Differences

- Income
- First visits higher
- Lower frequency
- Lower ticket price
- Motivations more:
 - Reflection
 - Friends/family
- Motivations less:
 - Intellectual stimulation

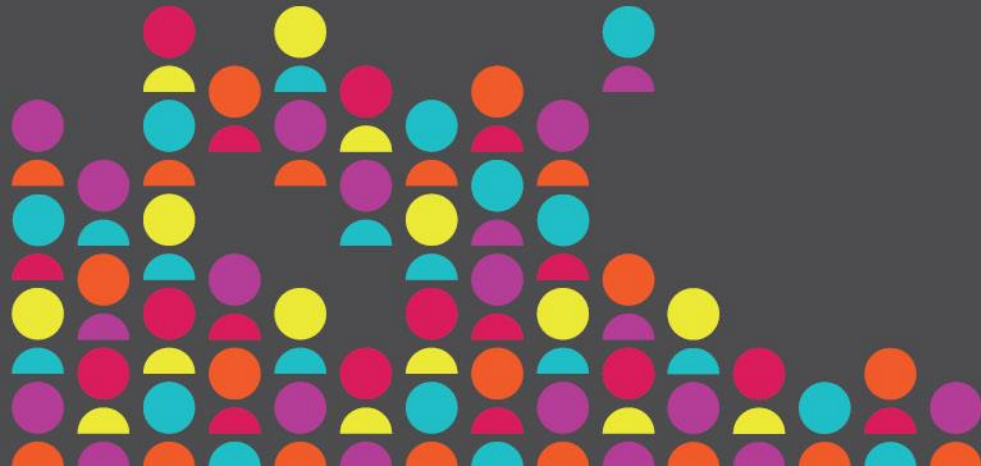
Kaleidoscope Creativity types

1. Inner City	2. Crowded	3. Elders	4. Comfortable
Older living centrally	Young harder pressed families living centrally	Oldest living in outer London, retirees	Younger with families, slightly better off, living in outer London
Highest booker frequency and the highest average ticket yield.	A lot of bookings but have the lowest ticket yield	Buy more tickets per transaction, they come in larger groups but pay less per ticket	Bring in most income with a relatively high ticket yield, although they are less frequent
Most likely to go to Classical (not family)	Most likely to go to contemporary work, and family work, Plays/Drama a favourite	Classical and popular	Prefer popular and family work More likely to go to Plays/Drama than other groups

Reaching Kaleidoscope Creativity

- Treats / special occasions
- Groups
- ‘Value’ offers - family ticket
- Genres of interest / familiarity
- Local, free, outdoor
- Family participation
- Community engagement

Practical solutions



What matters ...

- **Positioning** - Play to your strengths. Are you local, educational, familiar, specialist, popular, contemporary.
- **Effective communications** - Information giving is still king, websites still vital, but target more effectively geographically. Use social media selectively and offer depth of information where wanted.
- **Build partnerships** - use partnerships to extend reach. Think of other leisure interests, sponsorship. Where are they going when they are not with you?
- **Relationship-building** - with individuals. Use memberships, multi-buy. Suggest routes through your venue with added extras
- **Developing content** - Metroculturals mostly sit and read and watch on tablets. Give them a good read, rather than just social media sharing. They will share through verbal recommendation in their locality.
- **Developing formats** -Use tasters and bite-size selections of work. Add in Talks and events to match their own interests.

What can The Audience Agency do to help now?

- You can request Audience Spectrum profiling at sub-profile level immediately.
- Bespoke segmentation for your organisation
- Tag your database with Audience Spectrum segments
- Buy addresses of potential audiences based on Audience Spectrum

Enhance Audience Finder

- Audience Finder has an enhanced dashboard available now.
- View by second tier art-form, by Audience Spectrum segment or by date.
- Bespoke clusters for benchmarking
- Loyalty report - to inform CRM strategy
- Membership Manager - to identify membership prospects
- Sponsorship opportunity report
- Tour Tracker - to understand audiences for touring work
- Diversity monitoring included in surveying

[CONTACT www.theaudienceagency.org/tools](http://www.theaudienceagency.org/tools)

What's next: FREE SURVEYS...

- Sign up for audience surveying
 - Ongoing monitoring through Audience Finder
- Sign up for February 2016 performing arts survey week
 - E-survey 2015 attenders
 - Audience Finder survey provided

Next year we will be investigating:

- Cultural tourism
- Experience seekers



Thank you

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www.audiencefinder.org

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London Insights

1 December 2015, Rich Mix

@audienceagents

