the audience agency

City of London Audience Insights

Relevant findings from existing data, and gap analysis

Draft v1.0

Daniel Cowley, Research Manager
Anne Torregiani, Chief Executive

March 2025

Contents

Review of existing data

Summary

We analysed 47 documents containing audience insights and data from a range of City organisations from the period 2017-2024[1], to:

- → Understand the breadth of existing research – in terms of population described, themes covered, quality, and relevance
- → Add value where possible through deeper analysis
- → Synthesise findings relevant to this project

This feeds into the gap analysis, and subsequent primary research plan.

Available data

Measure	Count of sources, by relevance[2]		
	High	Medium	Low
All sources	*15*	*15*	*17*
Methodology			
Survey	9	10	2
Qualitative	0	3	1
Ticketing	6	3	2
Visitor figures/footfall	3	9	14
Other (inc. sales, retail reports, population statistics)	0	2	3
Population described			
Residents	12	11	11
Workers	12	12	11
Visitors	13	13	15
Themes			
Demographics	8	13	2

[1] Full data catalogue available separately
[2] "Relevance" is an overall indicator of how useful the insights/data are likely to be for this project, based on factors such as sample size and representativeness, recency, and specificity of the population described.

Home location – any indication	14	12	2
Precise (e.g. postcode/LA)	6	0	0
Broad (e.g. region)	8	12	2
Work location – any indication	6	6	1
Precise (e.g. postcode/LA)	1	0	0
Broad (e.g. region)	5	6	1
Motivations for engagement	7	7	2
Experience of engagement	7	7	3
Activity undertaken	11	9	4
Perceptions of the City	4	3	1
Engagement preferences/opportunities	5	4	0
Dwell time	1	1	0
Frequency	10	4	0
Spend	6	3	5
Audience Spectrum profile	6	6	1
Mosaic profile	6	1	0

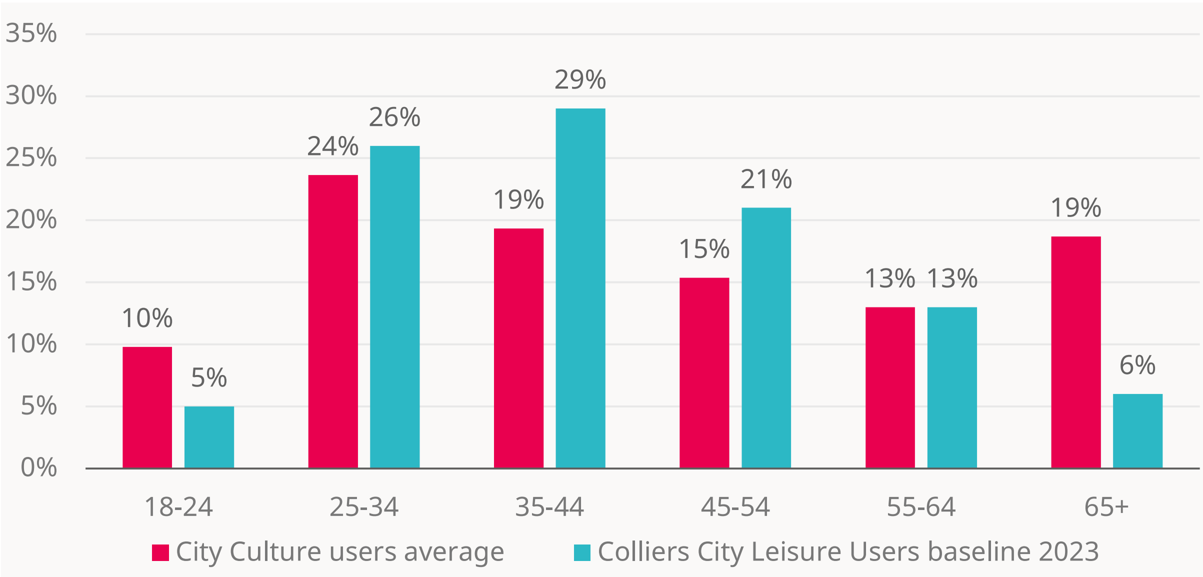
The following results include (where possible and relevant):

- → The average seen across the analysed datasets
- → The result from the 2023 Colliers baseline survey, as the strongest single dataset for describing City users
- → The 2021 Census, for the catchment area as defined by Audience Answers analysis

Where data/insights were not present amongst the secondary data, or were only available in a limited number of sources and therefore unlikely to be robust enough for our purposes, this has been noted.

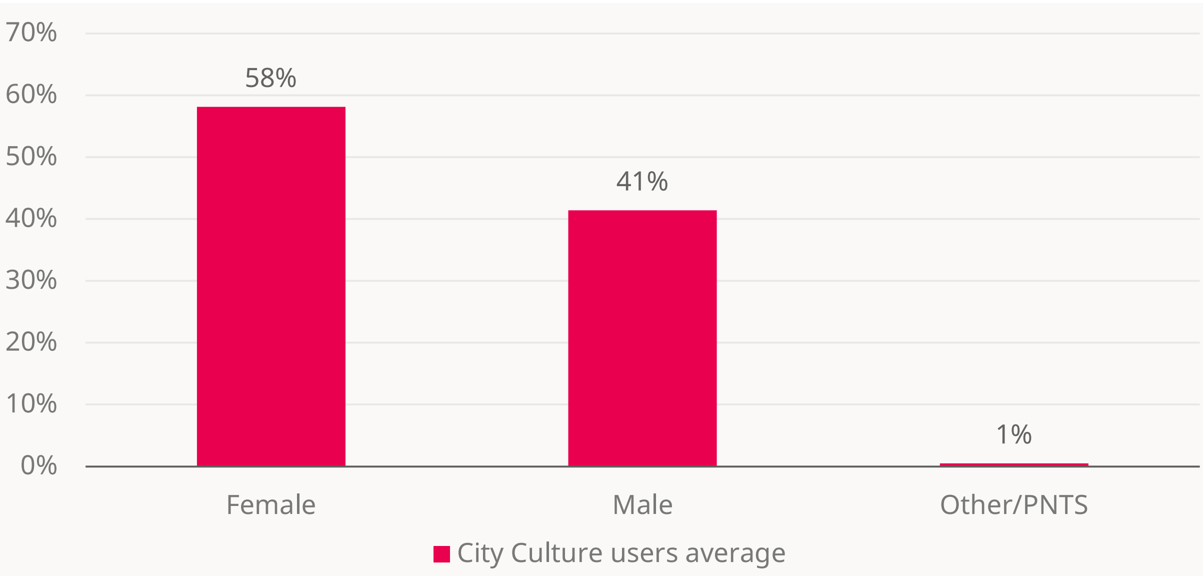
Demographics

Age



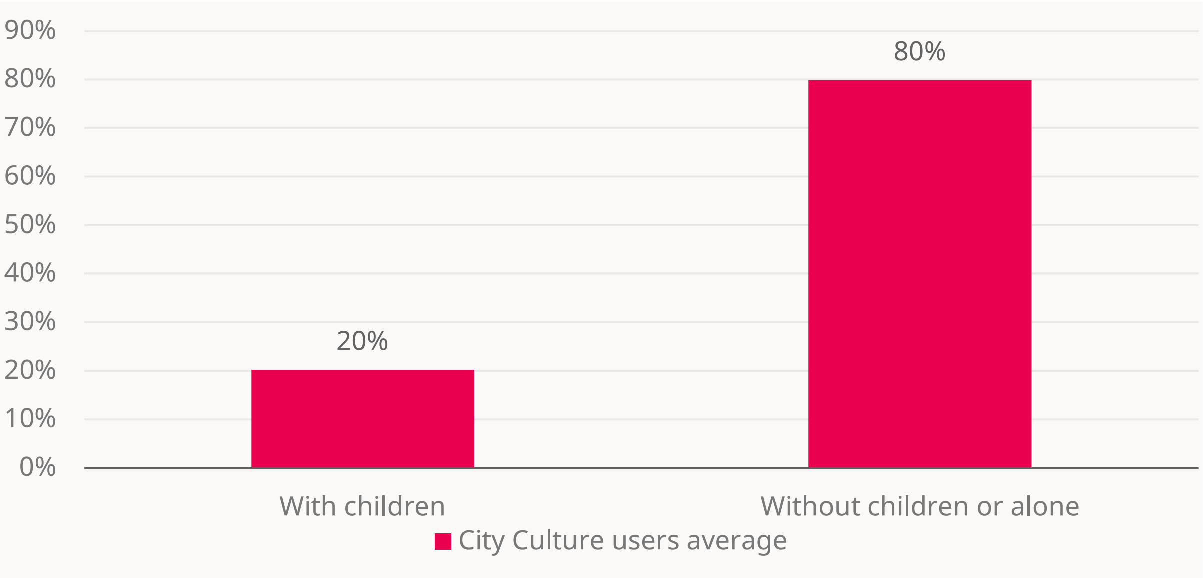
City Culture Users Average based on analysis of 10 secondary datasets

Gender



City Culture Users Average based on analysis of 8 secondary datasets

Children in party



City Culture Users Average based on analysis of 6 secondary datasets

Other

The Colliers 2023 City Leisure Users baseline suggests that:

- 61% of users live in a household with dependent children
- 91% are employed, 6% retired, 2% students, and 1% other
- The average individual income is c. £70k, with 6% earning less than £20k, 20% earning £20-40k, 22% earning £40-60k, 17% earning £60-80k, 15% earning £80-100k, and 20% earning more than £100k

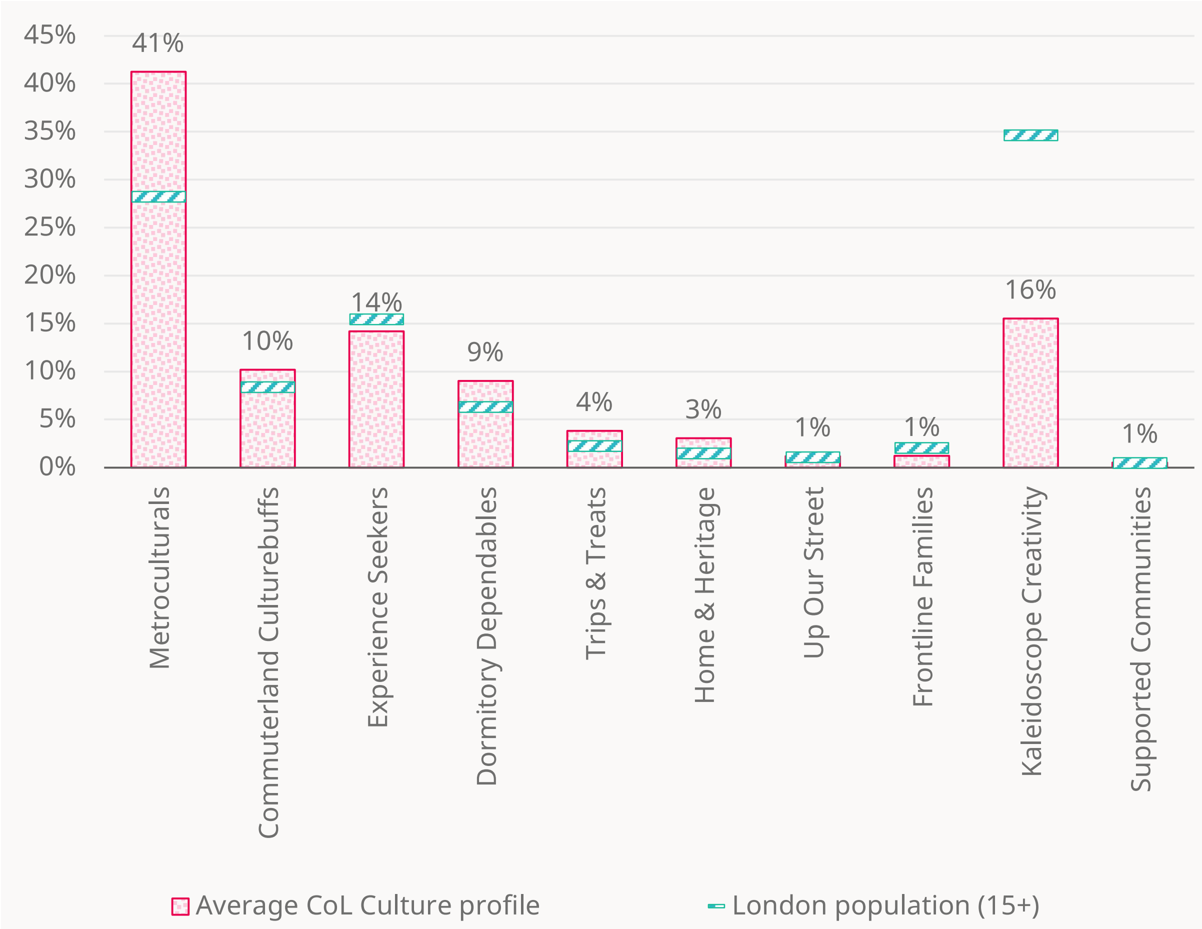
Equivalent figures were not available in other datasets.

Audience Spectrum profile

Culture audience

In the following analysis, “All users” considers the relative audience sizes for the fifteen datasets included in the analysis, so is the best indicator for the overall profile of City culture users; “Average CoL Culture profile” is the average of each organisation/event’s individual profiles, so is the best indicator for a “typical” City cultural organisation/event.

Audience Spectrum Segment	**All CoL Culture users**	**Average CoL Culture profile**	**London population** (15+)	**Index** (Average profile vs. Population)
Metroculturals	39%	41%	28%	**146**
Commuterland Culturebuffs	13%	10%	8%	**122**
Experience Seekers	13%	14%	15%	92
Dormitory Dependables	11%	9%	6%	**144**
Trips & Treats	4%	4%	2%	**171**
Home & Heritage	4%	3%	1%	**209**
Up Our Street	2%	1%	1%	**115**
Frontline Families	1%	1%	2%	**61**
Kaleidoscope Creativity	13%	16%	35%	**45**
Supported Communities	1%	1%	0%	**112**



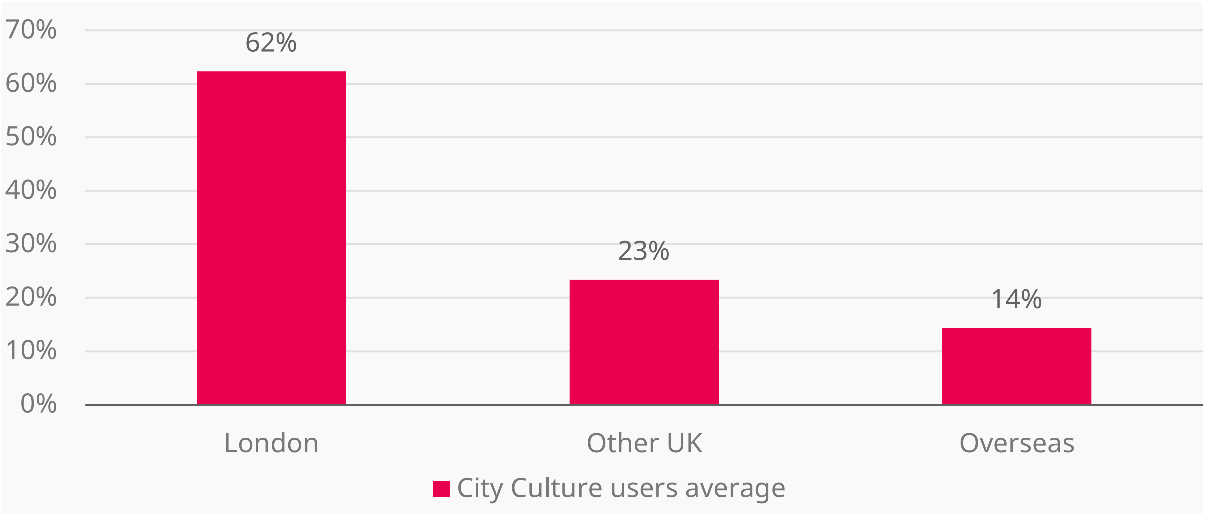
Average CoL Culture Profile based on analysis of 15 secondary datasets

Location

Broad location

This analysis is based on existing research findings where results were reported for the relevant geographic areas, and raw postcode data were available.

On average **62% of audiences for City Culture live in London**, 23% live elsewhere in the UK and 12% live overseas.



City Culture users average based on data from 11 sources

Region

A subset of existing reporting and datasets included a more granular breakdown of location, as follows:

UK region	Sum of available data	Average CoL Culture event/org
London	69%	73%
South East	11%	8%
East of England	9%	7%
South West	3%	2%
East Midlands	2%	2%
West Midlands	2%	1%
Yorkshire and The Humber	1%	1%
North West	1%	1%
Scotland	1%	1%

Wales	1%	1%
Northern Ireland	<1%	<1%
Unknown region	<1%	1%

Based on data from 8 sources. "Sum of available data" is the total of all datasets, taking into account relative size. "Average CoL Culture event/org" is the average across datasets.

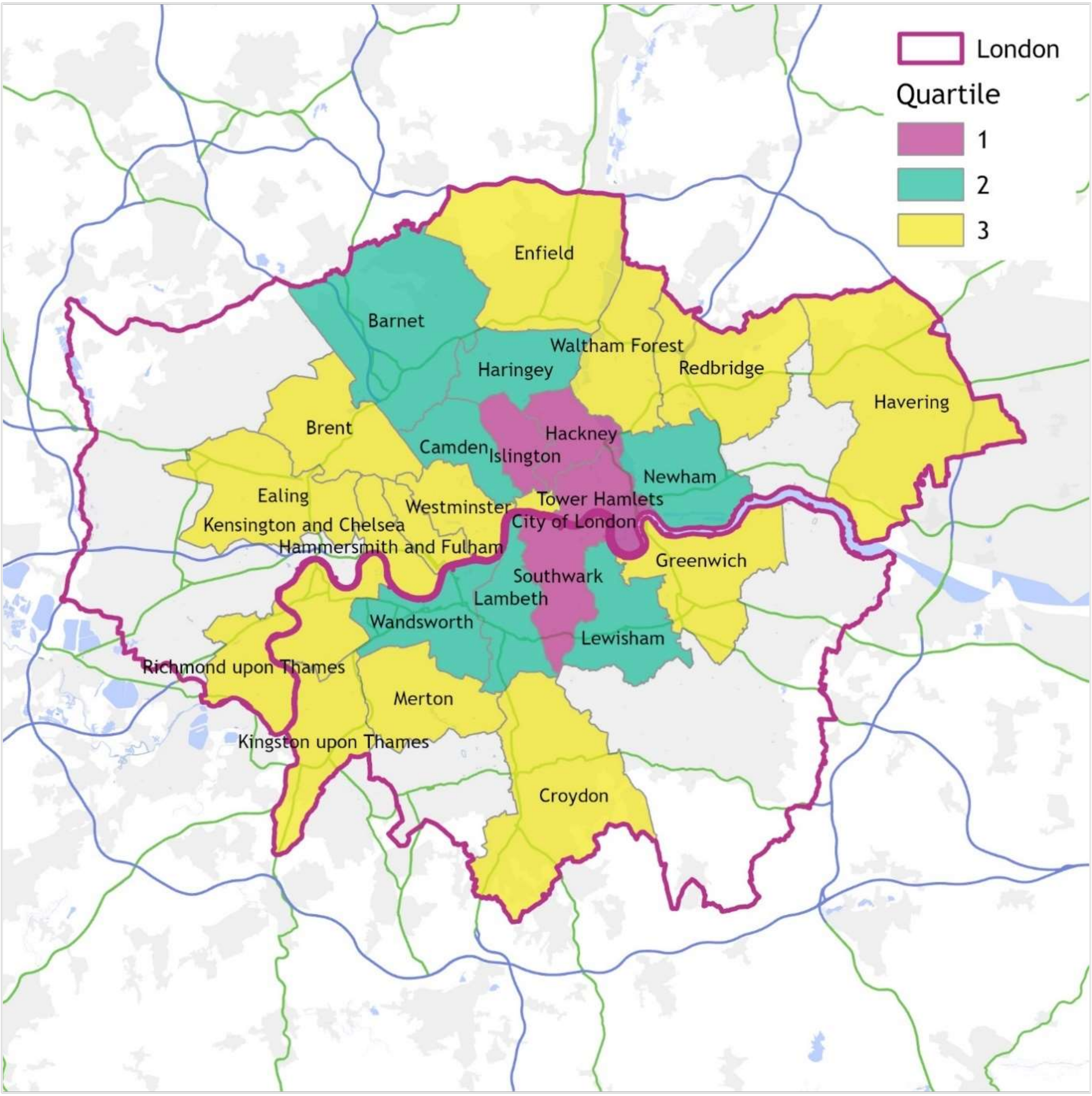
Local Authority

Looking at the same sources, the core catchment area consists of **Hackney, Tower Hamlets, Southwark and Islington**, which account for an average of a quarter of UK-resident audiences in each dataset. The wider catchment area from which 75% of UK audiences are drawn takes in 26 local authorities.

Top Local Authorities	Relation to the City	Sum of available data	Average CoL Culture event/org
Hackney	Eastern neighbour	5%	7%
Tower Hamlets	Eastern neighbour	5%	6%
Southwark	Southern neighbour	5%	6%
Islington	Northern neighbour	5%	5%
Lambeth	Southern neighbour	4%	4%
Camden	Northern neighbour	4%	4%
Haringey	Northern	3%	3%
Wandsworth	Southern	3%	3%
Lewisham	Southern	3%	3%
Barnet	Northern	3%	3%
Newham	Eastern	2%	3%
Westminster	Western neighbour	2%	2%

Based on data from 8 sources. "Sum of available data" is the total of all datasets, taking into account relative size. "Average CoL Culture event/org" is the average across datasets.

This analysis suggests it would be more accurate to describe the current reach as "less West than you might expect", rather than "Eastward"; the reach is **fairly omnidirectional**, with proximity to the City being the main indicator.


London
Quartile
1
2
3
Enfield
Barnet
Waltham Forest
Haringey
Redbridge
Havering
Brent
Hackney
Camden
Islington
Newham
Ealing
Tower Hamlets
Westminster
Kensington and Chelsea
City of London
Hammersmith and Fulham
Greenwich
Southwark
Lambeth
Wandsworth
Lewisham
Richmond upon Thames
Merton
Kingston upon Thames
Croydon

Motivations

16 sources describe the motivations behind respondents' attendance at City cultural events and/or visits to the City more widely. Due to the breadth of sources and activities covered, we cannot create benchmarks or describe the "average" motivation for engagement, or directly compare survey results; we can however draw out some illustrative examples from individual sources.

Visiting the City

The Colliers **City Leisure Users baseline** from 2023 explored the main purpose of a **visit to the City**, the top results being:

→ Work/Business meeting (34%)

→ Exploring the area (25%)

→ Meeting friends or family (14%)

→ Cultural activity (6%)

→ Shopping (3%)

→ Food or drink (3%)

Note, this describes "Leisure users", i.e. does not include those *only* in the area for work – however a significant proportion are likely to be City workers who are combining work and leisure. The top results for interviews carried out **at the weekend** reflect this:

→ Exploring the area (39%)

→ Work/Business meeting (15%)

→ Meeting friends or family (11%)

→ Cultural activity (12%) – *note this is double the overall baseline*

→ Shopping (4%)

→ Food or drink (3%)

The **Destination City** Londoner survey also included some insights on why Londoners last visited the City:

→ For work (40%)

→ For a cultural activity (16%)

→ For shopping (21%)

→ For food or drink (22%)

According to the **CIC survey** from 2020, the primary motivations for **culture users** to visit the City were:

- → To experience something new/different (48% cited as a motivation, 27% cited as their main motivation)
- → As part of the "tourist trail" (45% cited / 26% main)
- → To spend time with or educate children (33% cited / 12% main)
- → To go to a specific exhibition or activity (29% cited / 17% main)
- → To relax or escape (29% cited / 12% main)
- → For entertainment (12% cited / 5% main)
- → To spend time socialising (3% cited / 1% main)

Research undertaken with visitors to **Bartholomew Fair 2023** found that the main reasons for visiting the City were:

- → Cultural activity (31% of visitors - presumably mostly for the Fair itself)
- → Exploring the area (27%)
- → Work or business (11%)
- → Spending time with friends or family (9%)

Research for **The Golden Key** in 2022 found that the vast majority were in the City for the event itself; 88% were in the city for cultural activity, 13% to spend time with friends/family, 11% for food or drink, and just 1% for work.

Engaging with the cultural offer

Other surveys focused on the reason for attending the organisation or event at hand, rather than reasons for visiting the City as a whole. For visitors to **Tower Bridge** in 2024, the primary motivations were **for visiting the attraction** were:

- → To experience something new/different (19%)
- → As part of the "tourist trail" (34%)
- → For entertainment (17%)
- → To learn (14%)
- → To go to a specific exhibition or activity (9%)
- → To satisfy a personal interest (9%)

From the 2022 **The London Archives** user survey, the most often cited reason for a **visit to the archives** was to satisfy a personal interest (83%), significantly more than academic or professional reasons (27% and 15% respectively).

Information source

Six sources contained insights about sources of information for cultural activity in the City. The marketing mix for each organisation/event will have strongly determined the outcomes, but there are some consistent themes:

- → Around two thirds of City culture visitors had seen information about the event or organisation before visiting.
- → On average, 31% cited **prior knowledge of the organisation**, or **coming across the event during a visit**, as their main source of information about the activity they were undertaking.
- → **Word of mouth** about the event/organisation was cited as an information source by an average of 19% of culture visitors
- → **Digital content** (website, email, or social media) belonging to the organisation/event at hand or one of its partners (e.g. Visit London) was cited by an average of 18% of culture visitors
- → Digital content from **other organisations** was cited by an average of 19% of culture visitors
- → **Promotional print** (e.g. leaflets and maps) were cited by an average of 7%, where this was available as a source
- → **Newspapers and magazines** (either physical or online) were cited by an average of 5%.

Behaviour and activity

Secondary activity

Four of the existing research reports described the activities undertaken by visitors to City Culture events and venues beyond the cultural activity at hand.

Across all four surveys, **food and drink** came out as the activity most commonly undertaken alongside culture, with an average of 52% also using the City's food and drink offer during their visit. On average 27% **explored the City** during their visit, and 26% did some **sightseeing.** 24% went to **another attraction or cultural venue**, and 15% combined their visit with **shopping**.

The Destination City Londoner survey (2022) suggests that amongst Londoners who visit the City as a whole, almost all of those who would go to an event in the City would be very or somewhat likely to also go to a **café or restaurant**. A significant majority said they would also go shopping, or go to a pub or bar. 71% said they were very or somewhat likely to go to **another event, exhibition** or show.

Preferences

The City Leisure Consumers survey (Colliers, 2023) asked “What changes to the City of London area would make you want to visit it more often?”. Overall results are approximately as follows[3]:

- → 32% more events/attractions
- → 34% more green/public open spaces
- → 23% cultural offer
- → 22% different shops
- → 19% more cafés/restaurants
- → 17% more shops
- → 17% different cafés/restaurants
- → 20% wouldn’t visit more often (so 80% are open to doing so, with the right offer)

Of all the potential changes, more events and attractions had the smallest difference between frequent and infrequent leisure users of the City – suggesting this would be the most effective change for simultaneously **increasing frequency and encouraging the less engaged to visit**.

The relatively high favourability towards events/attractions and culture suggests room for growth in these areas, compared with shopping or dining – especially if offer is unique to the City.

Also from the City Leisure Consumers survey, 45% of respondents who are not currently frequent users of the City’s cultural offer non-users would consider visiting the City for a museum or gallery, higher than any other options (e.g. the Tower of London (27%), St. Paul’s (13%) or the Barbican (9%).

This suggests the London Museum and Museum of Migration are likely to be more effective at encouraging visits from the less engaged than other elements of the City’s permanent cultural offer.

The Destination City survey (2022) highlights the most appealing reasons for visiting the City amongst Londoners as a whole (i.e. including those who are infrequent or non-visitors). The top factors were:

[3] Results in source report split by frequent users (visit more than once pre three months) and infrequent users (every three months or less often); estimate for whole dataset presented in this summary

- → Range of cafés, restaurants and pubs (44%)
- → Unique heritage and history (43%)
- → Mix of new and old buildings (42%)
- → Cultural offer (36%)

The **unique heritage** offer was significantly more appealing to those who **don't work in the City** (48% vs. 29% of City workers) and **older Londoners** (61% of those aged 55+).

Perceptions of the City

Eight of the reports analysed contain insights on perceptions of the City and its cultural offer - from existing users of the offer, non-users, and workers.

Baseline perception

The Destination City survey of Londoners (2022) notes that perceptions of the City are **broadly positive**, with only around one third of ruling the City out as a place they would consider visiting for leisure (based on current perceptions of the City's offer). Three quarters agreed that **tailored events** could help make the City feel more vibrant and welcoming and encourage more leisure visits. Perception of the **expense** of leisure options in the City was a key concern.

City Leisure Consumers described in the Baseline Insights Report (Colliers, 2023) cited key barriers for infrequent visitors as:

- → Shops and restaurants too expensive (36%)
- → Too many tourists (20%)
- → Lack of uniqueness (17%)

Only 10% of infrequent visitors considered the city unwelcoming, so this is not a significant barrier to overcome; **perception of price** may be an issue (even for free events). Some specific changes which the report noted may increase likelihood of visits were activating the City during quiet periods ("[It's a] ghost city on a Sunday") and more free events and family activities. Note that the sample size behind these insights, and therefore the potential size of impact of such changes, is unknown.

Impact of cultural events

Four event surveys (for The Golden Key, Londinium, Women: Work and Power, and Fantastic Feats) asked about attenders' perceptions of the City, and the impact attending an event had had on them. On average 41% agreed that the event at hand had a **positive impact on attenders' perceptions** of the City as a cultural place; changes in perception were typically about previously having seen the City as a **place for work**, and now seeing it as more of a **vibrant cultural destination**.

This is echoed in the Bartholomew Fair research (2023), with 68% of attenders saying it have improved their perception of the area. This was the case for domestic tourists (68%) and international visitors (76%) as well as two thirds of city workers and Londoners who may have been expected to have had a better sense of the City before visiting.

Focus on City workers

Key findings from the City Stats factsheet (2023)

- → Almost 600,000 people work in the City of London, with 36% working in financial services and 26% in professional services. 11% work in business services, 11% tech, and 16% in other sectors.
- → Over half of City workers are employed by large businesses
- → The workforce is younger than the UK's working population as a whole, with 61% aged 22-39, and skews male (64% of workers)
- → 37% of the workforce are of a Black, Asian or Minority ethnic group.
- → 42% of workers were born outside the UK, with Accounting, Financial and Market Administration, and Tech businesses having the most international workforces
- → Jobs have grown post-pandemic, with nearly 45,000 more jobs in the City in 2022 compared with 2019

Key findings from the Residents and Workers survey (DJS, 2022)

1,108 City workers were interviewed, from a range of sectors - the top ones being Financial and Insurance (21%), Retail (13%), Information & communication/Tech (9%) and Construction (8%).

- → Around 45% are very satisfied with the City as a place to work, 46% fairly satisfied
- → Satisfaction with the City as place to work was higher amongst those in higher socio-economic groups – 93% satisfied in group A vs. 82% in group DE
- → Workers find the City visually attractive (88% agreed with this statement), and that it is enjoyable to walk around (84%). Fewer felt that the City was fun (75%, the statement with the lowest agreement, consistent regardless of length of employment in the City).
- → The City received a Net Promoter Score of 30 as a place to work. 44% were promoters (i.e. gave a 9/10 or 10/10 for likelihood of recommendation), 42% passive (gave a 7 or 8) and 14% were detractors (gave a score of zero to six)

- The City of London Corporation’s support of cultural activities was rated fairly highly, with 76% of workers thinking the Corporation was doing a good or very good job on this area. This tended to be more highly rated by older people.
- 90% of workers thought that “ensuring the City remains attractive for business to locate” was a somewhat or very important policy for the Corporation. This was the case for 84% of workers regarding “improving footfall in small businesses by making [the City] a more attractive destination”
- 53% of workers reported visiting the Barbican Centre in the past year; 42% visiting a City-managed open-space, and 16% attended the Lord Mayor’s Show.
- When asked about the good things about working in the City, 12% of workers mentioned good amenities (behind 28% mentioning ease of getting to the City, but ahead of 10% mentioning job opportunities).
- When asked about the bad things about working in the City, the top complaint was expense/high prices, mentioned by 12% of workers.
- In the post-pandemic context, net 19% of workers said they expected to spend more time working in the City over the coming 12 months.
- 83% of workers said they visit the City at the weekend at least once a year. 23% visit a few times a year at most, 21% every few months, 25% once or twice a month, and 17% more often.
- Of the potential encouragements to visit the City at the weekend, “More activities/entertainment/live music” was rated highest, with 9% saying this would encourage a visit – so not especially high, but higher than alternatives such as more or later-opening shops/restaurants/bars (7%) or cheaper prices (5%).
- Workers generally felt that the City had become a better place to work over the past five years (net 34% agreement), and expected this trend to continue (net 41% saying they expected the City would become a better place to work over the next few years)

Key findings from the Destination City Londoners survey (Innovation and Growth/ Savanta ComRes, 2022)

Based on a representative sample of Londoners, those who said their main place of work was in the City were more likely than others to:

- → Consider a **visit to the City in their leisure** time with friends (76% vs. 62% of those who don't work in the City) and family (70% vs. 56%)
- → Value the City's open/green spaces (32% vs. 17%) – possibly due to a lack of knowledge of such spaces amongst those who don't work in the City
- → Consider going to the cinema or theatre (76% vs. 68% of all respondents) or unique/immersive experiences (75% vs. 64%)

They were less likely to:

- → Value the unique heritage of the City (29% vs. 48% of non-City workers
- → Cite lack of awareness of events or exhibitions in the City as a reason for not attending (18% vs. 31%)

Note: this survey sample was broadly representative of London adults, however 30% of respondents said their main workplace was in the City of London – which is highly unlikely to be correct - and are analysed as "City workers". This limits the usefulness of analysis of "City workers" in this survey, and suggests that a significant proportion of respondents may have been mis-identifying the City throughout the survey.

Key findings from Transport Strategy research (Systra, 2023)

Based on a sample of 693 workers, this survey showed:

- → Workers tend to find travel to the City very or quite easy (38%/47%), and travel around the City (48% very easy, 40% easy)
- → Whilst 74% agreed or strongly agreed that the share of street space given to pedestrians was adequate, only 54% agreed that it was "easy to find places to sit and rest in the City".
- → More workers disagreed than agreed that "The air in the City is clean", and 64% agreed that "Traffic in the City is too high"

Key findings from the City Workers AS profile (TAA, 2017-19)

Audience Spectrum analysis of workers at City events in 2017, 2018 and 2019 (Londinium, Women: Work and Power, and Fantastic Feats) showed the main segments amongst workers at these events were:

- → Metroculturals (47%) – slightly under-represented compared with the London population

- → Kaleidoscope Creativity (18%) – under-represented compared with the London population
- → Experience Seekers (15%) – over-represented compared with the London population

Market analysis

Background

This section is based on analysis of Audience Answers ticketing data, from the following organisations' activity in the City of London:

- Barbican (including the LSO, Boy Blue Entertainment, and Cheek By Jowl)
- The Museum of London
- Bishopsgate Institute

Booker data from Guildhall Art Gallery is also included in geographic and Audience Spectrum analysis where noted.

The wider group of organisations delivering art, culture and heritage activity across London consists of 72 organisations, including:

Arcola

Artsadmin

Battersea Arts Centre

Bridge Theatre London

Camden People's Theatre

Conway Hall

Discover Children's Story Centre

Donmar Warehouse

Hackney Empire

Hoxton Hall

ICA

Little Angel Theatre

London Philharmonic Orchestra

Opera Holland Park

Regent's Park Open Air Theatre

Rich Mix

Royal College of Music

Sadler's Wells

Shakespeare's Globe

Shoreditch Town Hall

Soho Theatre

Southbank Centre

Spitalfields Music

The Albany

The Yard Theatre

Trinity Laban

Unicorn Theatre

LIFT Festival

Southbank Centre

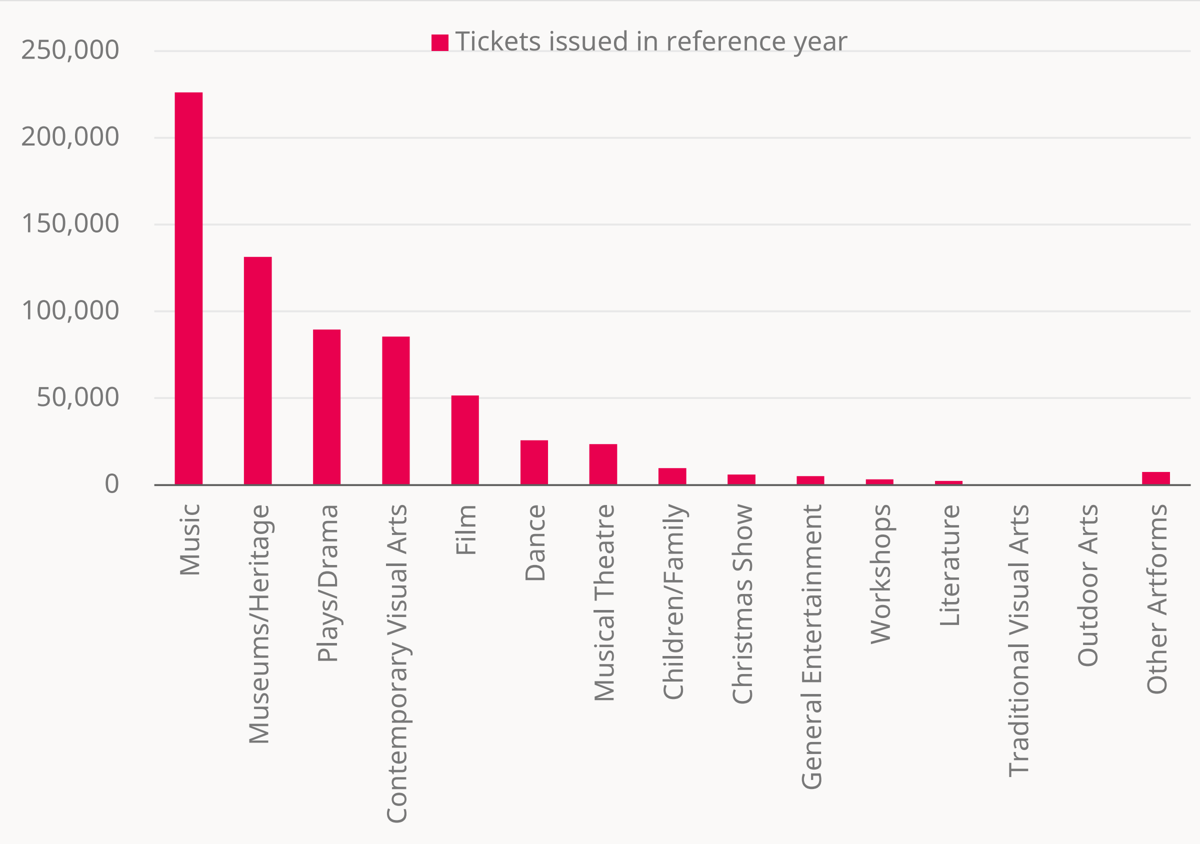
King's Head Theatre

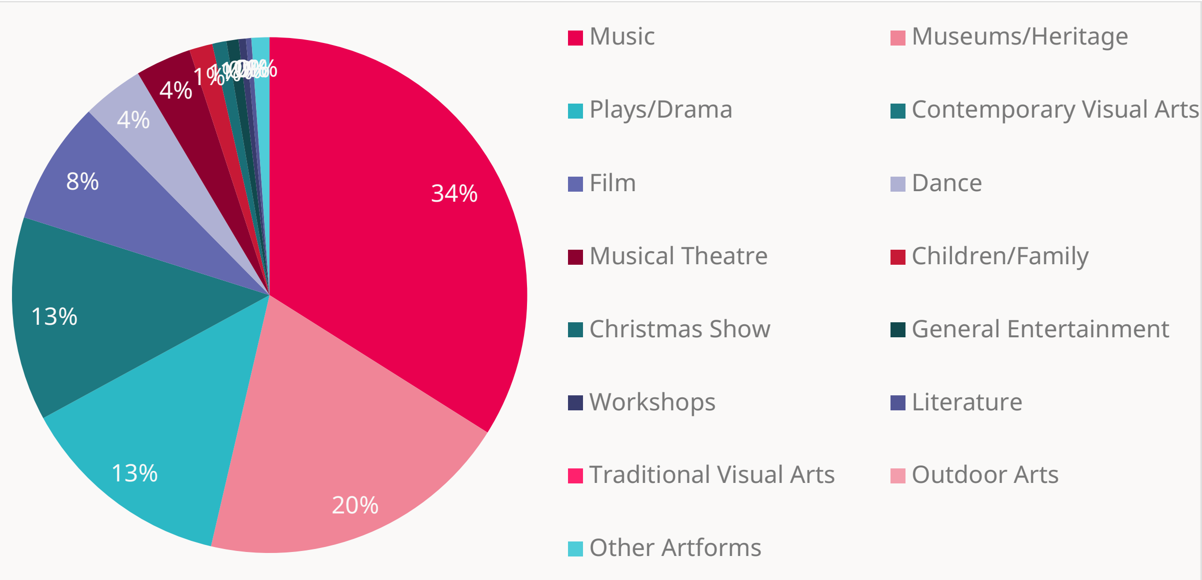
JW3

The City's offer

This analysis describes the mix of ticketed cultural activity delivered at the City's three Audience Answers venues (Barbican, Bishopsgate Institute, and the Museum of London).

The most prominent artforms in terms of tickets issued were **Music**, **Museums/Heritage**, **Plays/Drama**, and **Contemporary Visual Arts**.





Behaviours of audiences

Sales metrics

Looking at ticket sales at **City venues in 2022**[4] (Barbican, Museum of London, Bishopsgate Institute) via Audience Answers, we see a total of

- → **209,779 unique bookers**
- → ...making **362,130 bookings**
- → ...across which **720,331 tickets** were issued
- → ...with a total of **£15.3m income** generated from ticket sales.

This works out to an average of:

- → 1.7 bookings, 3.4 tickets and £73 income per unique booker per year
- → 2 tickets and £42 income per transaction
- → £21 income per ticket issued

Measure	CoL Venues combined	Average CoL venue
Unique bookers	**209,779**	**71,189**
Average bookings per booker	1.7	1.7
Average tickets per booker	3.4	3.1
Average income per booker	£72.95	£44.18
Total bookings	**362,130**	**120,710**
Average tickets per booking	2.0	1.9
Average income per booking	£42.26	£23.54
Total tickets	**720,331**	**240,110**
Average income per ticket	£21.25	£14.24
Total income	**£15,303,565**	**£5,101,188**

[4] 2022 is the most recent full year for which all City venues have complete, artform-coded ticketing data in Audience Answers, and as such has been used for all analysis in this section

Sales metrics by artform

The following tables show sales metrics for each artform at City venues for each artform[5].

Artform	Measure			
	Unique bookers	Total bookings	Total tickets	Total income
Music	72,571	118,930	226,118	£6,364,609
Contemporary Visual Arts	45,709	58,704	98,085	£1,044,269
Museums/Heritage	43,384	52,430	132,921	£93,125
Plays/Drama	35,025	39,614	89,511	£4,678,140
Film	28,854	51,977	90,043	£805,045
Dance	10,857	14,373	25,707	£522,337
Musical Theatre	9,626	10,326	23,356	£1,289,671
Other Artforms	4,255	4,605	8,424	£98,003
Children/Family	2,526	3,786	9,686	£11,784
General Entertainment	2,141	2,250	5,022	£93,042
Christmas Show	1,641	1,713	5,944	£174,704
Workshops	1,632	2,067	3,207	£76,126
Literature	1,199	1,245	2,153	£50,713
Traditional Visual Arts	56	66	81	£960
Outdoor Arts	9	9	11	£0

Artform	Measure			
	% of unique bookers	% of total bookings	% of total tickets	% of total income
Music	35%	33%	31%	42%
Contemporary Visual Arts	22%	16%	14%	7%
Museums/Heritage	21%	14%	18%	1%

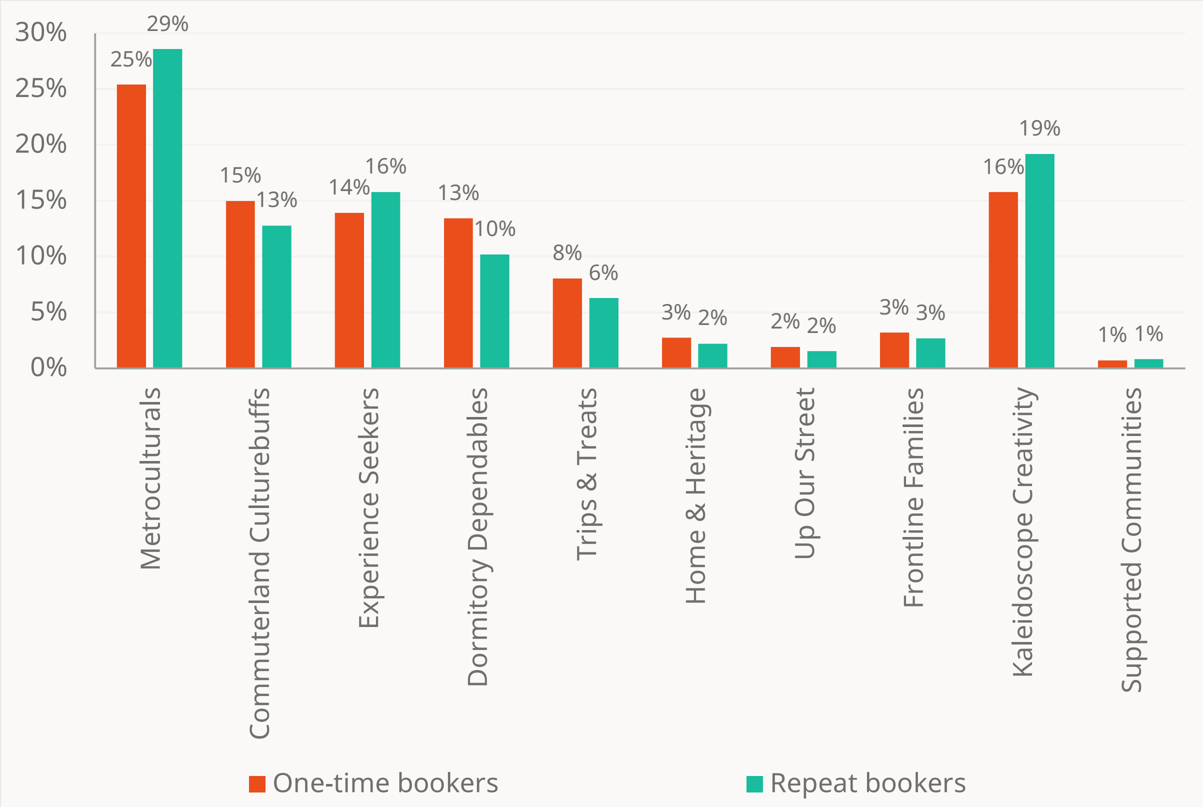
[5] Where productions were not coded by the venue, machine learning has been used to assign the most likely artform.

Plays/Drama	17%	11%	12%	31%
Film	14%	14%	13%	5%
Dance	5%	4%	4%	3%
Musical Theatre	5%	3%	3%	8%
Other Artforms	2%	1%	1%	1%
Children/Family	1%	1%	1%	0%
General Entertainment	1%	1%	1%	1%
Christmas Show	1%	0%	1%	1%
Workshops	1%	1%	0%	0%
Literature	1%	0%	0%	0%
Traditional Visual Arts	0%	0%	0%	0%
Outdoor Arts	0%	0%	0%	0%

Repeat vs. One-time bookers

Overall, around three quarters of bookers at City venues booked once in a two-year period from January 2022, and **a quarter booked more than once** in this period.

The profile of repeat bookers is similar to those who only booked once, with a slight over-representation of Metroculturals and Kaleidoscope Creativity amongst repeat bookers:

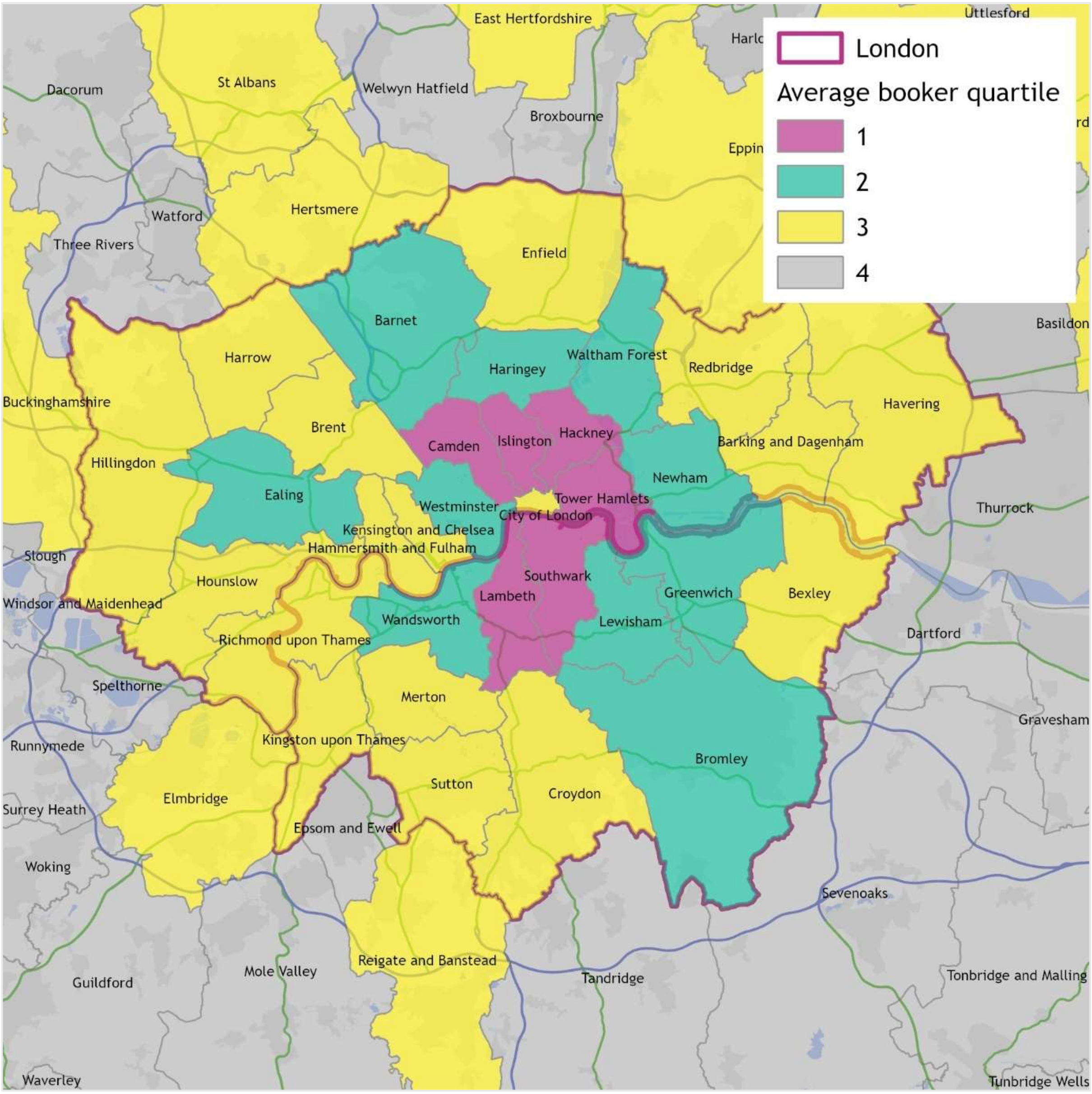


The over-representation of Metroculturals, Experience Seekers and Kaleidoscope Creativity is likely due to a combination of proximity to the City and interest in the offer, these three segments being particularly prominent in inner London.

Catchment area for existing CoL provision

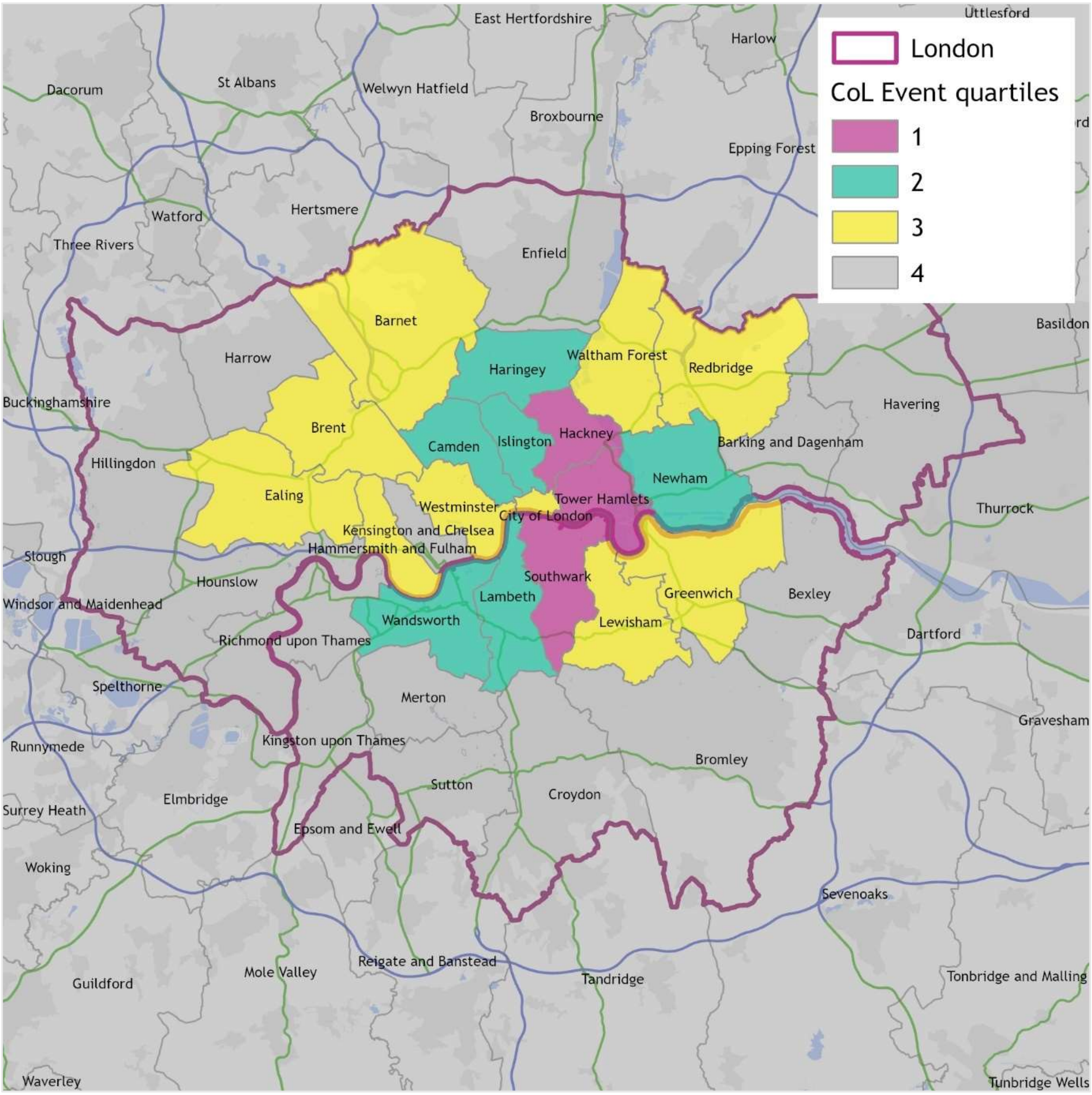
The following analysis is based on post-pandemic booker data via Audience Answers (Barbican, Museum of London and Bishopsgate Institute) and postcode data supplied by Guildhall Art Gallery.

Based on these datasets, the core catchment area for the City covers **Hackney, Islington, Tower Hamlets, Southwark, Camden, and Lambeth**. Together, these six boroughs account for a total of 25% of bookers. The wider catchment area, from which 75% of visitors are drawn, includes all London boroughs and extends to many neighbouring local authority areas.



As seen in the earlier analysis of secondary data and reports, this analysis also suggests a mild eastward-focus perhaps better understood as reflecting a smaller proportion of visitors from West London, given the prominence of North and South East London boroughs.

When we look at the most recent data available for City of London events (2017-2019: Londinium, House of Sound, Women: Work and Power, and Fantastic Feats) we see a much tighter catchment area (i.e. a less dispersed/more local audience), with Hackney, Tower Hamlets and Southwark still the top boroughs (accounting for on average 25% of visitors), with Islington, Lambeth, Wandsworth, Haringey, Camden and Newham making up the next 25% of visitors.



Audience Spectrum opportunities

This analysis is based on Audience Answers booker data for 2022 – the most recent full year for which ticketing data is available across City of London venues (Barbican, Bishopsgate Institute, and the Museum of London).

The 50% catchment area for these bookers (i.e. the local authorities which together account for 50% of bookers) consists of:

- → Tower Hamlets
- → Hackney
- → Southwark
- → Islington
- → Camden
- → Lambeth
- → Lewisham
- → Haringey
- → Barnet
- → Waltham Forest
- → Wandsworth
- → Westminster
- → Greenwich
- → Ealing
- → Newham
- → Bromley

Bookers from the catchment areas are compared with the background profile of the area, to identify which segments are likely to be core attenders of the City's future offer, and those which will require more significant efforts (via outreach and programming) to reach.

It also identifies areas *within* the catchment area which have particularly notable levels of propensity towards and penetration of the current offer, and potential for generating future audiences. This is viewed overall, and through the lens of individual artforms.

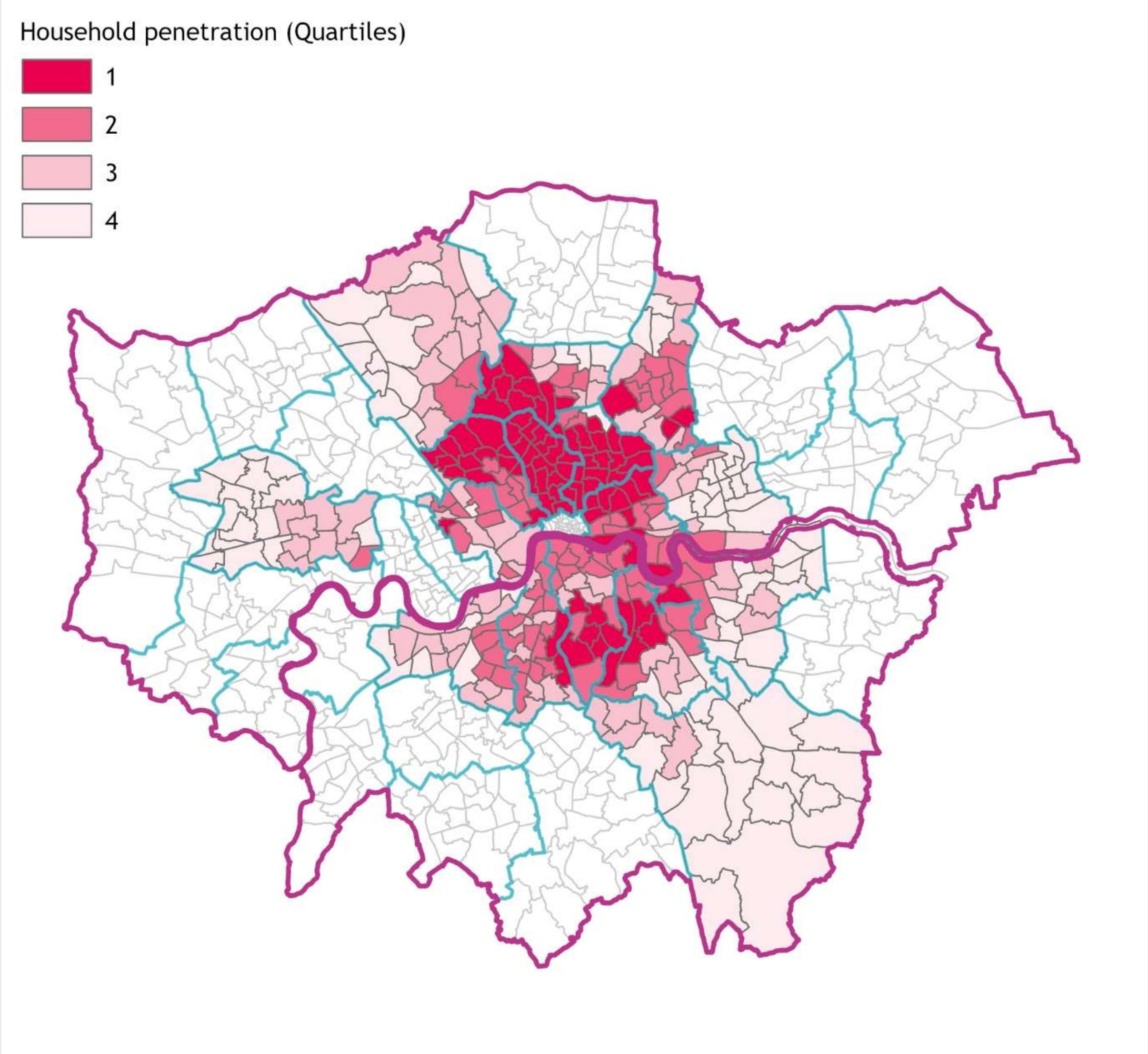
Household penetration within the catchment area

Household Penetration is the percentage of households in each ward which contain bookers.

The top wards in terms of penetration are:

- → Bunhill (Islington, 18.8%)
- → Highbury (Islington,16.8%)
- → Clissold (Hackney, 15.7%)
- → Stoke Newington (Hackney, 15.7%)
- → Stroud Green (Haringey, 14.9%)
- → De Beauvoir (Hackney, 14.8%)
- → Dalston (Hackney, 14.6%)
- → Lea Bridge (Hackney, 13.9%)
- → Brownswood (Hackney, 13.6%)
- → Bow West (Tower Hamlets, 13.5%)

The following map expresses penetration in quartiles with quartile 1 having the quarter of wards with the highest levels of penetration and quartile 4 the lowest penetration.

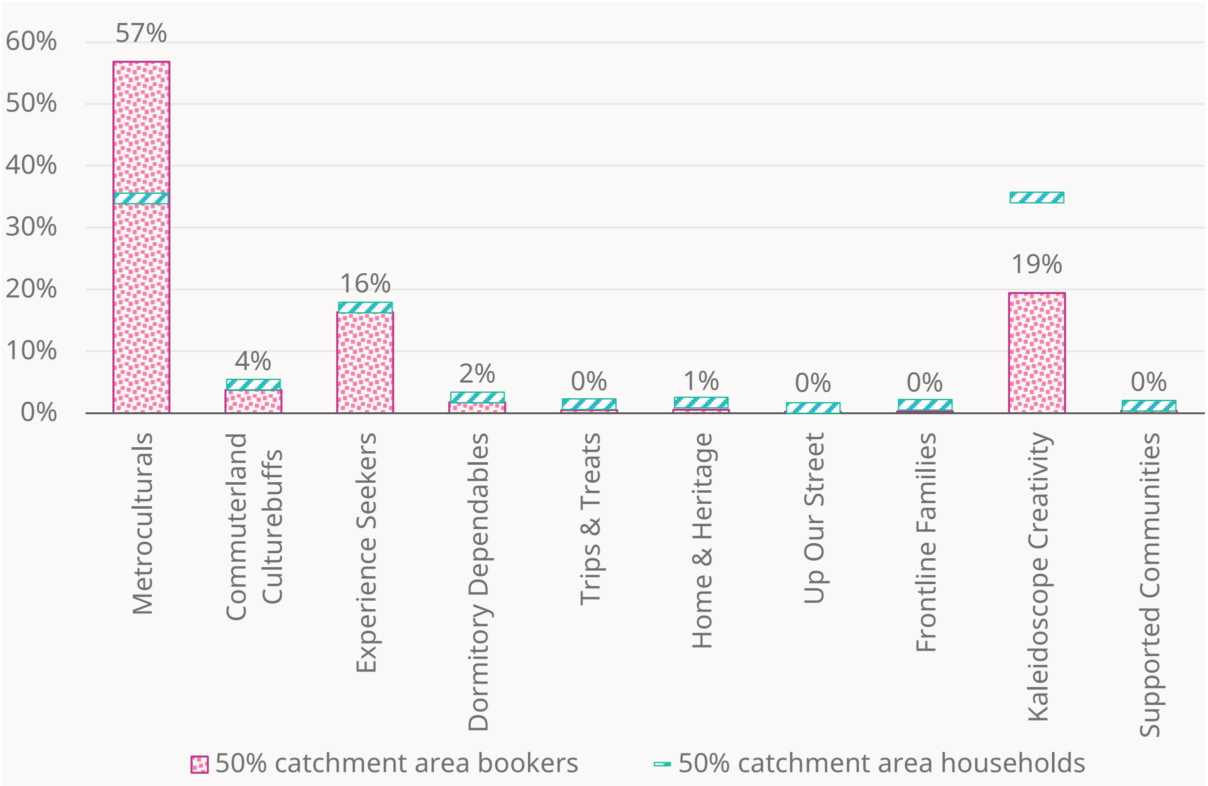


Audience Spectrum profile within the catchment area

Across the 16 boroughs of the catchment area, Kaleidoscope Creativity are significantly over-represented amongst bookers. Experience Seekers are on-index, and Kaleidoscope Creativity are under-represented.

Audience Spectrum segment	50% catchment area bookers	50% catchment area households	Index
Metroculturals	57%	35%	164
Commuterland Culturebuffs	4%	5%	82
Experience Seekers	16%	17%	96

Dormitory Dependables	2%	3%	69
Trips & Treats	0%	1%	34
Home & Heritage	1%	2%	34
Up Our Street	0%	1%	30
Frontline Families	0%	1%	20
Kaleidoscope Creativity	19%	35%	56
Supported Communities	0%	1%	33



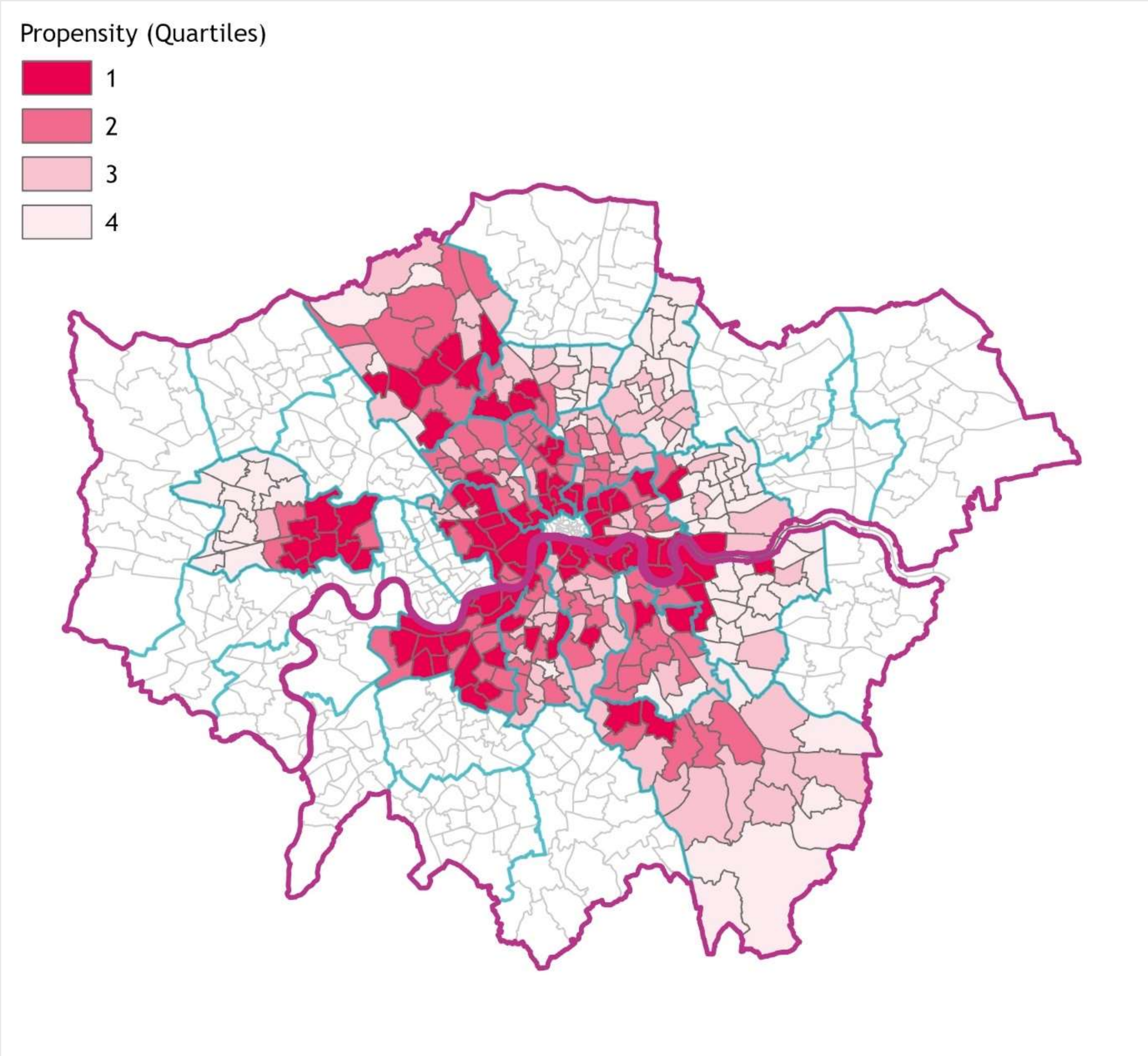
Propensity within the catchment area

By comparing the Audience Spectrum indexes for the catchment area as a whole with the profile of households in each ward in the catchment area we can understand which wards we would expect to have a particularly high propensity for the City's current cultural offer.

The top wards on this measure are:

- → Blackwall & Cubitt Town (Tower Hamlets)
- → Canary Wharf (Tower Hamlets)
- → West End (Westminster)
- → Whitechapel (Tower Hamlets)
- → St James's (Westminster)
- → St Mary's (Wandsworth)
- → Thamesfield (Wandsworth)

- → East Putney (Wandsworth)
- → Knightsbridge & Belgravia (Westminster)
- → Regent's Park (Westminster)



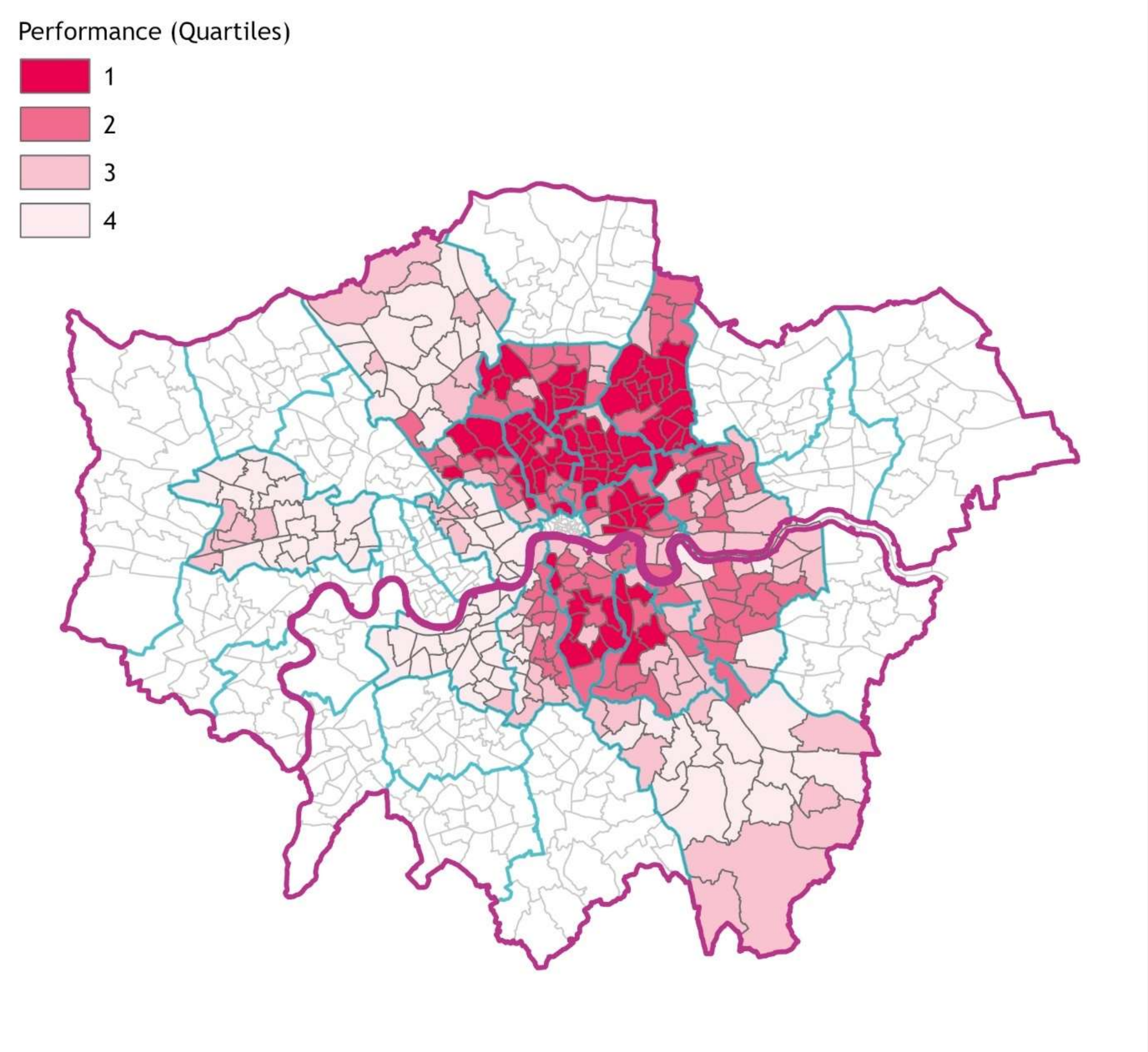
Performance and Potential within the catchment area

Performance and Potential consider the difference between the levels of Household Penetration and underlying Propensity to attend within each ward.

As such, wards in the top quartile for Performance are those where more bookers live than you would expect given the underlying propensity in that ward. Potential is the opposite, with wards in the top quartile being those with the most headroom to grow audiences beyond current levels, given the underlying propensity in the ward.

Note that performance will to some extent be a consequence of proximity; we might expect wards nearer the City to be more open to the offer than those further away. That being said, the top wards in terms of performance are:

- King's Park (Hackney)
- Shacklewell (Hackney)
- Chapel End (Waltham Forest)
- Brownswood (Hackney)
- Hermitage & Gardens (Haringey)
- De Beauvoir (Hackney)
- Homerton (Hackney)
- William Morris (Waltham Forest)
- Haggerston (Hackney)
- Grove Green (Waltham Forest)

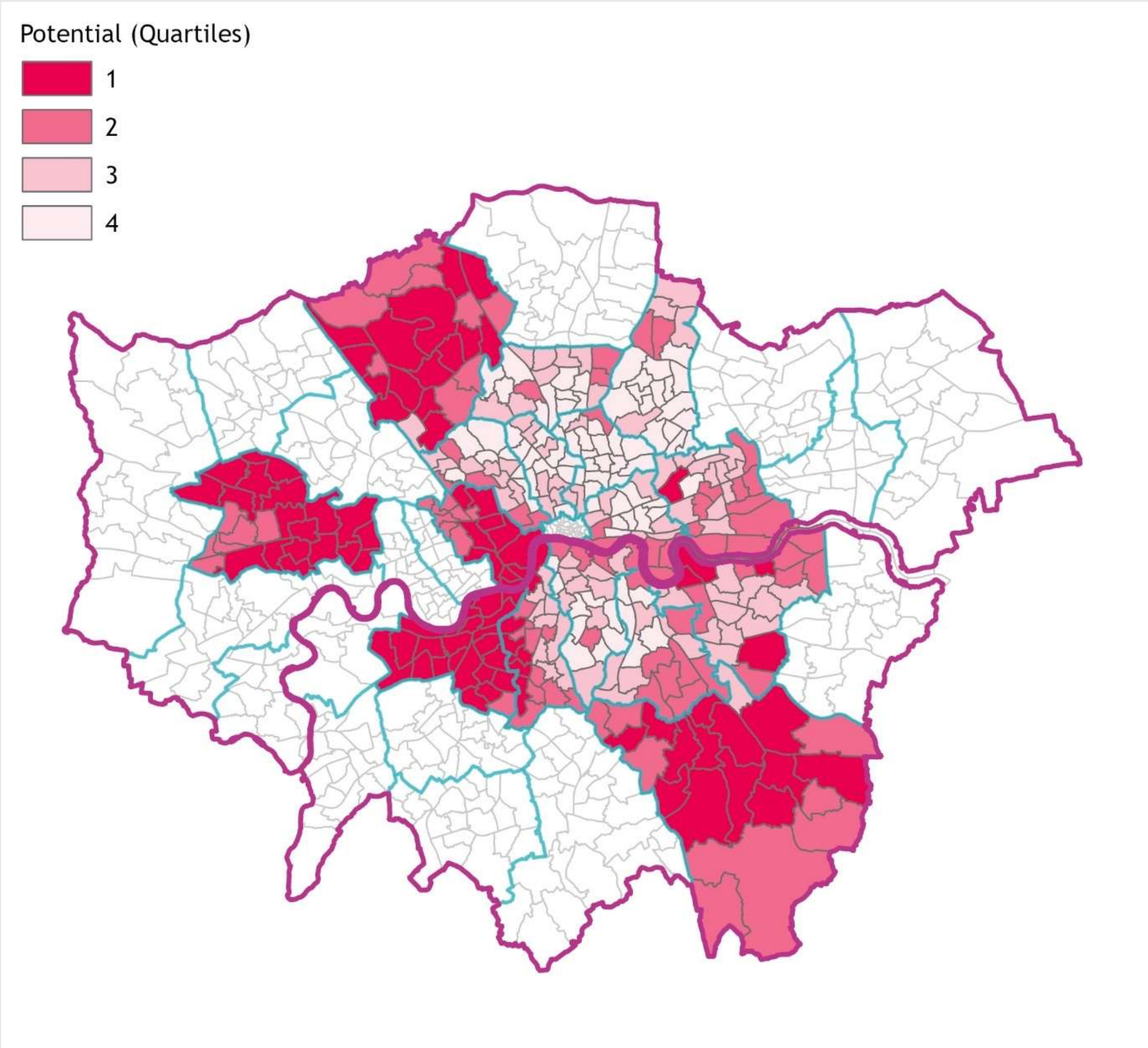


The wards with the most potential for growing audiences for the current offer are:

- Nine Elms (Wandsworth)
- Wandsworth Common (Wandsworth)
- Knightsbridge & Belgravia (Westminster)
- Colindale South (Barnet)
- West Putney (Wandsworth)
- Hendon (Barnet)
- Hyde Park (Westminster)
- Shaftesbury & Queenstown (Wandsworth)

- → Wandsworth Town (Wandsworth)
- → West Hill (Wandsworth)

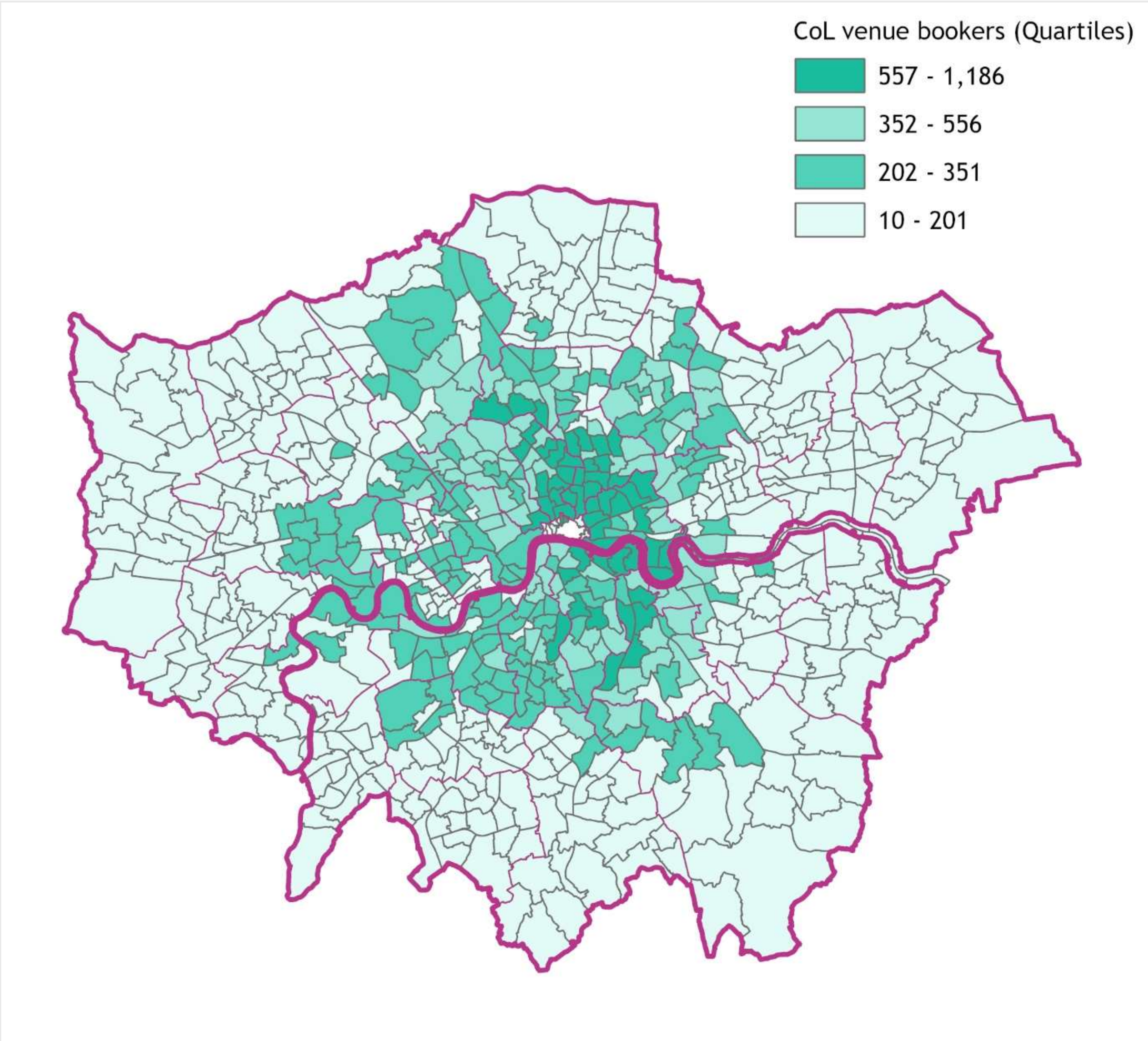
It’s particularly worth noting the effect of proximity when looking at potential for growth. Whilst the top wards have the most headroom for growing audiences compared to the current audience, distance is likely to be a barrier for those further from the City.



The City’s place in the London market

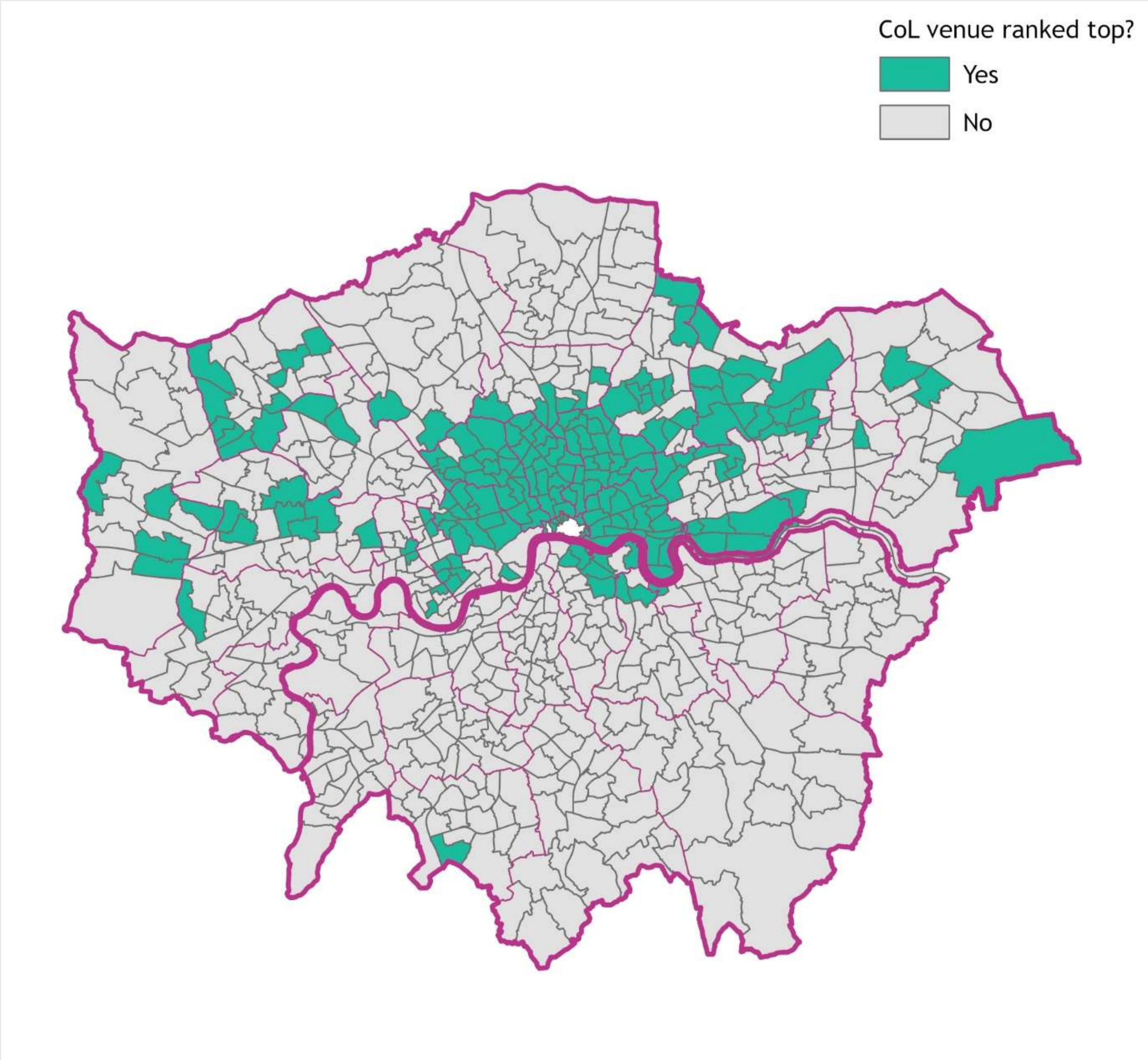
This analysis considers 67 London Audience Answers venues and ranks each within every ward in London according to the number of tickets sold in a reference year[6].

The following map shows the number of City venue bookers (Barbican, Bishopsgate Institute, and the Museum of London) in 2022 for all wards in London. This is a very similar picture to that seen elsewhere in this report, where analysis was undertaken at Local Authority level (and on a slightly different time period, due to the available data sources).



When we also look at the number of bookings made for *other* London venues by people living within each ward we can identify those wards where more people book for a City venue than any other single London Audience Answers venue:

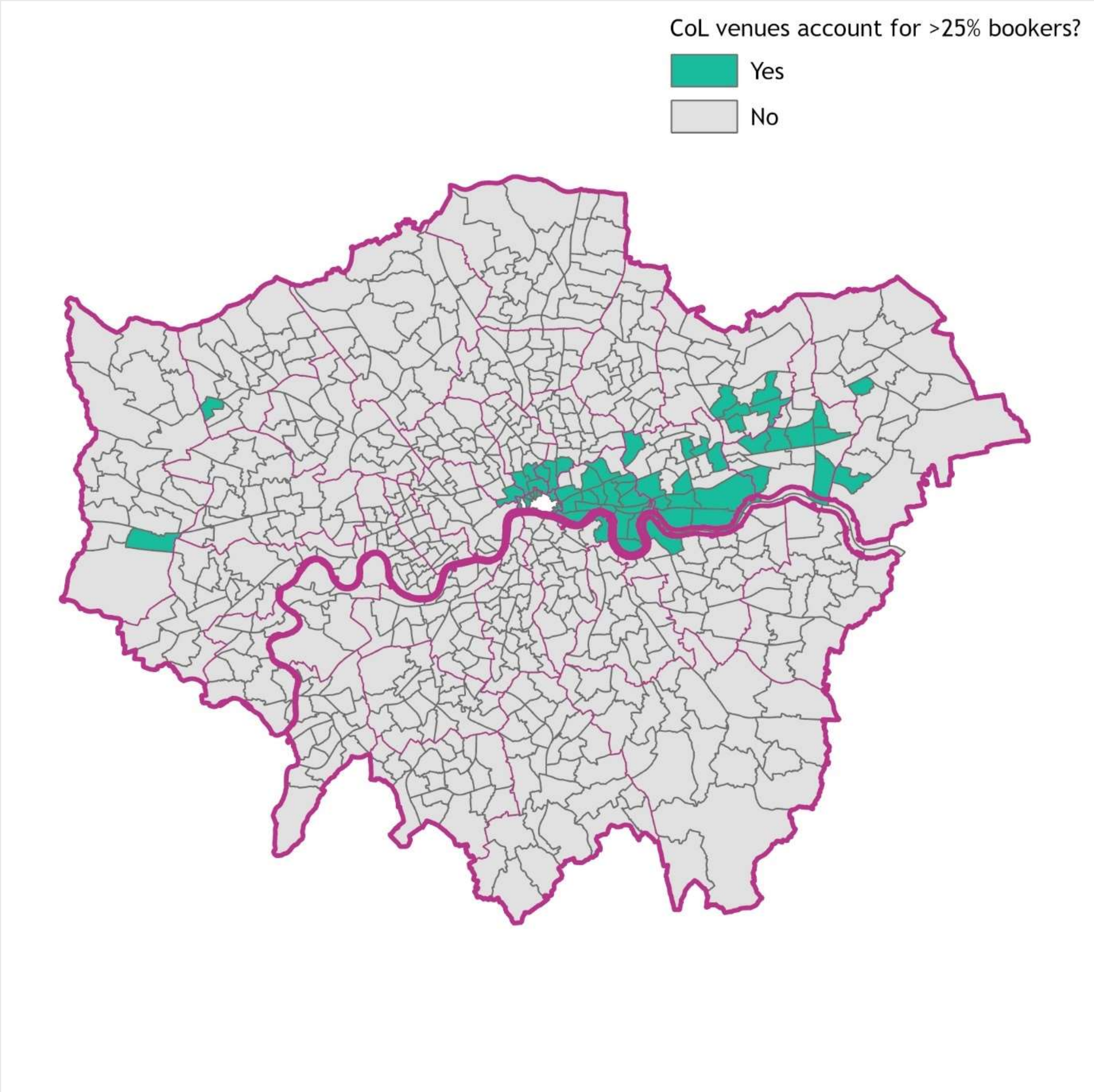
[6] The reference year is 2022 – this is the single year for which we currently have the largest range of venues, including all three City venues.



This was the case in 192 wards, mostly around central and East London. Wards in and around the Docklands are likely to have seen City venues outrank other venues at least in part due the London Museum's dataset against a backdrop of relatively low arts engagement[7].

Being even more specific, the following map shows wards where the three City venues together account for more than 25% of all-London venue bookers in these wards:

[7] Activity reasonably assumed to have taken part at the Museum in Docklands was not included in the London Museum's dataset, however some such events may still exist in the analysis.



This shows a particular preference for City venues in City and City-adjacent wards, and again suggests the influence of the Museum of London to some extent in the Docklands area.

Crossover with other London venues

Overall, within the reference year of 2022 the most prominent other London venues amongst those who book at City venues were:

- → Southbank Centre (17% of City venue bookers also booking here)
- → Sadler’s Wells (8%)
- → Bridge Theatre (5%)

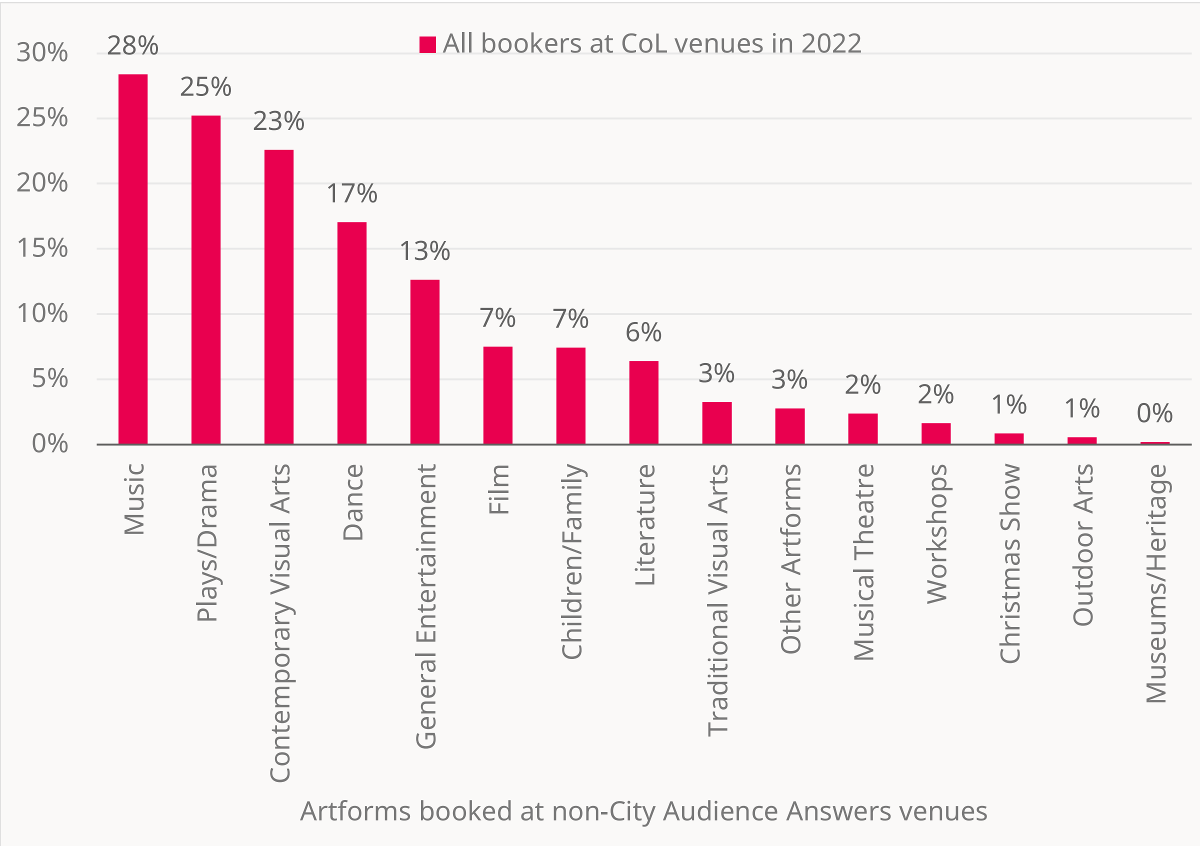
- → Shakespeare's Globe (5%)
- → Soho Theatre (4%)
- → Cadogan Hall (3%)
- → Alexandra Palace (3%)

Overall, Barbican and in particular Bishopsgate Institute bookers were more likely to have booked at other London venues than Museum of London bookers.

Activity at other London venues

This analysis looks at what bookers at City venues did in 2022 at Audience Answers venues elsewhere in London.

Overall, **Music** was the most widely booked artform elsewhere in London, 28% of City venue bookers having booked for Music elsewhere in London in 2022. 25% had booked for **Plays/Drama** elsewhere in London, 23% **Contemporary Visual Arts**, and 17% **Dance**.



Gap analysis for emerging themes

Things Made Public have identified six themes to guide the development of a cultural strategy for the City;

1. Where Culture Means Business
2. Seeding a Creative Ecosystem
3. Old City, New Stories
4. The World in One Square Mile
5. Building for the Next Century
6. Culture That Cares

Themes five and six above fall outside the audience-focussed remit of the data review; gaps identified in the existing research as it relates to themes one to four are outlined below.

Theme 1: Where Culture Means Business

Culture as a driver to return-to-workplace is under-researched – both in terms of the benefit of ease of access to after-work cultural activity (perceived or actual), and the role the existence of a vibrant arts and culture offer in and of itself has in improving perceptions of commercial centres. These areas could be explored through **primary research with workers and businesses**.

The cultural interests of city workers are under-researched: their current interest in and uptake of the City's cultural offer as it stands; their wider cultural interests and activity; and the intersection of these two areas – what they would consider doing in the City in future. **Primary research with City workers** is therefore essential to explore the viability of this segment for audience development, and the form such activities would take.

Theme 2: Seeding a Creative Ecosystem

Existing datasets contain few insights regarding how, why, and how many young people engage with culture in the City. However we would expect the proportion of young people amongst all City audiences to be low, and concentrated in targeted activities.

Although not available through the data audit, if City organisations capture information about their schools engagement activity a **Schools Engagement Report** would identify pupils reached by current engagement activity, highlighting current successes and giving a benchmark to build from.

A **Schools Target Area Report** would highlight schools of interest within target catchment area. This should be delivered as part of future activity planning.

Theme 3: Old City, New Stories

Whilst the data audit did not contain significant insight into perceptions of the City, the City has a rich history and significant unique historical assets to draw upon.

Primary research with the Peripheral Communities segment would identify levels of interest in these stories, and contribute towards the development of a suitable programme of activity.

The London Museum developments and relocation of the Migration Museum present opportunities to reach new audiences, and **secondary research** may be undertaken to model their potential impact, in terms of the visitor profile and areas from which visitors are likely to travel. It is likely that significant work is already being undertaken in these areas, which could be tapped into.

Theme 4: The World in One Square Mile

Analysis of existing data shows a large proportion of international businesses, workers and visitors present in the City, however little is known about their cultural needs or preferences. These gaps could be filled with **primary research with businesses and workers**, ensuring a sample size and/or qualitative recruitment approach to allow us to understand opportunities for these distinct groups. Future work undertaken by Things Made Public will explore how to leverage existing international links.