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City of London

Audience Playbook

A Reference Guide

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About the Playbook

This Audience Playbook is based on research and analysis of actual and potential audiences for culture in the City of London. It provides general insights about its audiences, and about 9 different audience segments we identified.

Who is it for?

Anyone who needs a detailed understanding of who City **cultural audiences** are, and who they could be, such as:

Planners

Producers

Programmers

Marketers

Fundraisers

Engagement specialists

What does it do?

- The Playbook summarises who interacts with the City, for what, why and how.
- Outlines existing and potential audiences, their programming preferences and effective approaches to engaging them.
- Breaks down **existing** and **potential** City audiences into segments based on cultural tastes and their relationship to the City.

How does it relate to the Cultural Strategy?

The Cultural Strategy is intended to be collaboratively delivered by organisations providing cultural activity across the City. By providing a shared understanding of both existing and potential audiences, their needs, interests and behaviours, partners will be better equipped to work together to **grow, attract, retain** and **connect** with the priority audience groups identified.

How can it be used?

Find out:

- How to strengthen your current audience
- Who your next audience could be
- Where to find them and what they need
- What you can do to attract them

Plan more relevant:

- Programming,
- Pricing and environment
- Communication

About the segmentation and the portraits

Not all audiences are the same, people have different interests, motivations, and may face different barriers to engaging. Audience segmentation enables a clearer understanding of these differences, informing the development of cultural programmes tailored to audience interests and the design of effective marketing approaches to reach them.

The Playbook sets out a segmentation model specific to the City's cultural offer, identifying nine distinct audience groups made up of people who live, work in, or visit the City.

By establishing a shared understanding of these audience segments, their needs, interests, and behaviours, organisations across the City will be better equipped to collaborate in delivering the Cultural Strategy, working together to **grow**, **attract**, **retain**, and **connect** with priority audiences.

Segments were identified through an extensive programme of research and analysis commissioned by City of London, including:

- A review of 40+ reports, including audience surveys, market research, programme evaluations, and feasibility studies from the past 5 years
- Analysis of ticketing data from 6 City-based organisations – using The Audience Agency's Audience Spectrum* profiling tool
- A population survey with a representative sample of arts-interested people in London and South East.

Insights were synthesised to create the segmentation, grouping audiences by their cultural interests and habits. It is based on **two key factors**: interest in mainstream cultural offers and their proximity to and relationship with, the City.

Each segment has an accompanying **portrait**, the portraits include:

- **Key facts and figures** about that segment and their relationship with arts, heritage and culture
- How they relate to the **Commitments** in the **Cultural Strategy**
- **Practical suggestions** across the audience development mix: programme, place, price and communications, community and co-creation
- **The segments and the City**: perceptions of the City, benefits and potential barriers

Audiences and the Cultural Strategy

The Cultural Strategy is designed to make the City a uniquely engaging and inspiring place for many different audiences: a place visitors choose over others, a place local residents are proud of, and where people want to come to work.

Each of the Strategy's Commitments is more or less relevant to different audiences. The Playbook highlights this potential to help drive engagement among audience segments in one of four different ways:

RETAIN – maintain and extend the City's reputation, frequency and share of core London audiences:

Metroculturals | City Connoisseurs

CONNECT – reach out and build long-term connections with local communities:

Doorstep Families | Good Neighbours

ATTRACT – invite more domestic visitors to explore the full range of the City's offer:

Culture Fix | Heritage Visitors | Family Day-Trippers

GROW – prioritise and spark the interest of a next generation of audiences:

Urban Explorers | City Casuals

Together, the Commitments address both common needs and more specific interests. Developing them all at the same time creates a strong base to help grow and support audiences in different ways.

Introducing The Segments

Highly Interested & Active

- Metroculturals
- Urban Explorers
- Culture Fix
- City Connoisseurs

Culturally active and enthusiastic about a wide range of quality, public arts and culture, these groups are all open to classical as well as new/ contemporary offerings and have a higher appetite for risk.

The City needs to compete for these discerning groups who scan the horizon for the best on offer.

Medium Interest & Active

- Heritage Visitors
- Family Day-trippers
- City Casuals

These segments are open to persuasion when it comes to arts and culture and are interested in taking part if activities are a good fit with their social or family life. All travel into the City from outer London or the home counties, either as a commuter or occasional visitor. All these groups search out engaging day or special night out from time to time.

They're looking for "something different to do" but prefer familiar or popular names, stories, history etc.

Less Interested and Active

- Doorstep Families
- Good Neighbours

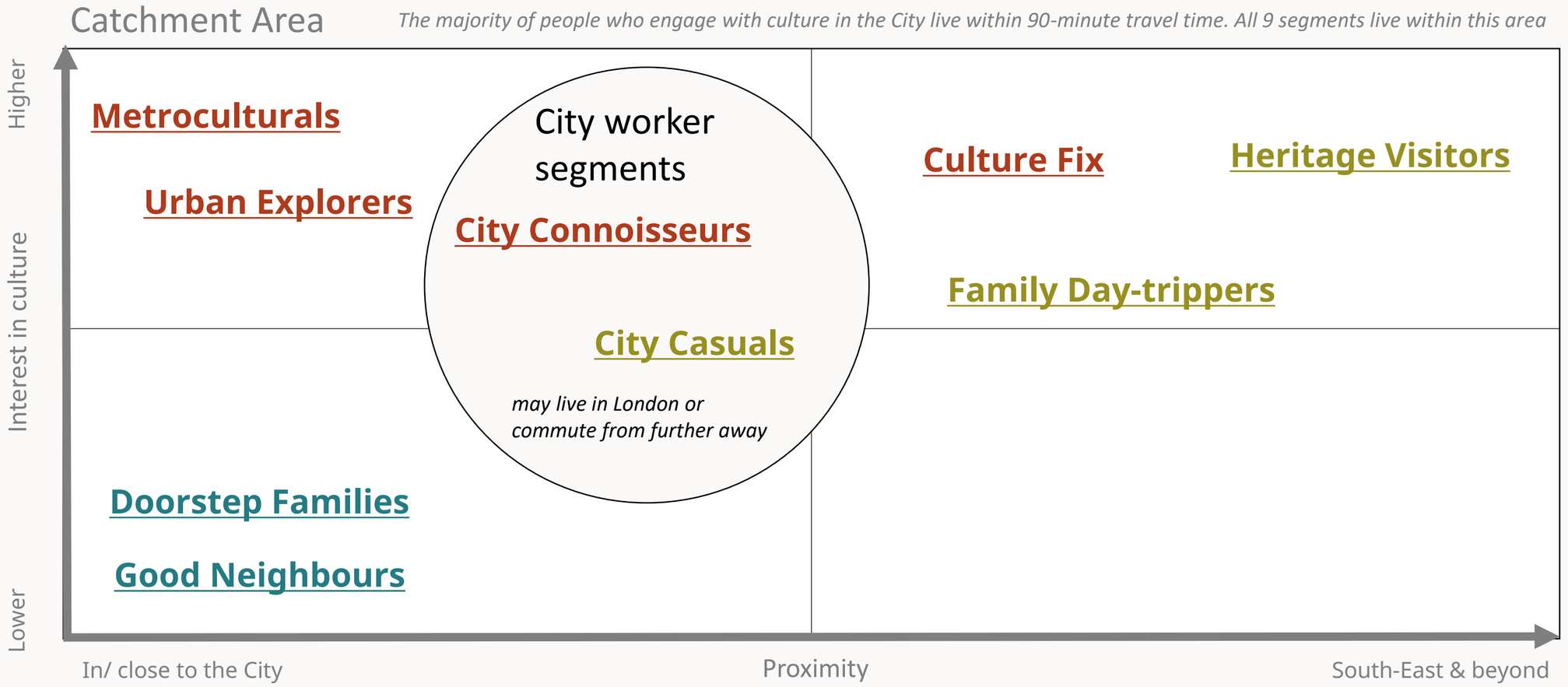
A bit less focused on filling their limited leisure time with formal, public culture, these groups live around the edges of the City, often in public, rented or shared housing. They might not think of themselves as "into the arts" but are up for fun, entertaining and good value events close to home, and take part in a wide range of less formal creative activities.

The opportunity to socialize is really important, as is the chance to celebrate the community – with its multiple roots - and feel properly part of it.

The segments mapped

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The segmentation is based on **2 dimensions**: a) people's **level of interest in**, and engagement with, public culture and b) their **proximity to the City** – resident, worker or visitor**.** Both factors influence what people might attend, where and why. This model gives an overview of where each segment fits.



*The segments sit on the foundations of Audience Spectrum which has been modelled on extensive data samples but enhanced with additional data relevant to the City's culture.

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An Overview of City Audiences

An overview of City Audiences

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Where do the audiences come from?

The City's cultural audience covers London and nearby counties within **90 minutes** travel

62% of visitors come from London, mainly Hackney, Tower Hamlets, Southwark and Islington

23% come from **outside London**, chiefly Kent, Surrey, Sussex and Essex

Around 70% of the catchment are active cultural consumers, a **potential market of c. 10 million**

Around 12% of visitors are **internationa**l, mainly from the United States, France and Germany

How do audiences currently behave?

Most people only attend a cultural organisation **once a year.**

Local audiences attend more often. Longer travel is reserved for major or high-profile events

Museums are the main draw, followed by heritage offers, performing arts and pop-up markets

Visiting patterns vary: retirees and unemployed visit weekdays; families, day-trippers, locals and young people favour weekends

Workers say appealing cultural offers would encourage them to **stay after work** and visit on weekends

What is the potential for growth?

Strong **untapped demand** for culture in the City

Competes with wider London for cultural audiences

Key draws include unique experiences, atmosphere, historic settings, calm spaces and community

Seen as **historic** and **interesting** but less as vibrant or creative, highlighting scope to modernise perception

As part of the development process for the Cultural Strategy, the team commissioned research and analysis to understand current and potential audiences. Find out more [Audience Insight Report 1 and 2 links].

An overview of City Audiences

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How do demographics impact engagement?

Younger audiences are more likely to recognize aspects of the City as contemporary and creative, despite its historical associations

Older audiences are more drawn to its **heritage** offer

Lower-income groups are less aware of the City's cultural offer and more likely to view it as **exclusive**

Potential **Global Majority audiences** have **varied preferences**, indicating the need for choice and a wide range of programming

How do audiences currently behave?

The City is generally viewed **positively** compared with other London destinations

The **West End** is seen as offering more attractions

The **South Ba**nk is considered easier to access

Clerkenwell-Farringdon is perceived as less expensive

East bank is likely to become a significant competitor

How do City workers interact with its culture?

Around **9%** of the cultural market are **City workers**

They have a **nuanced understanding** of the City's identity compared to other audience groups

Some workers are **highly culturally engaged** and particularly interested in: outdoor festivals, non-traditional venues, family-friendly events, and participatory activities

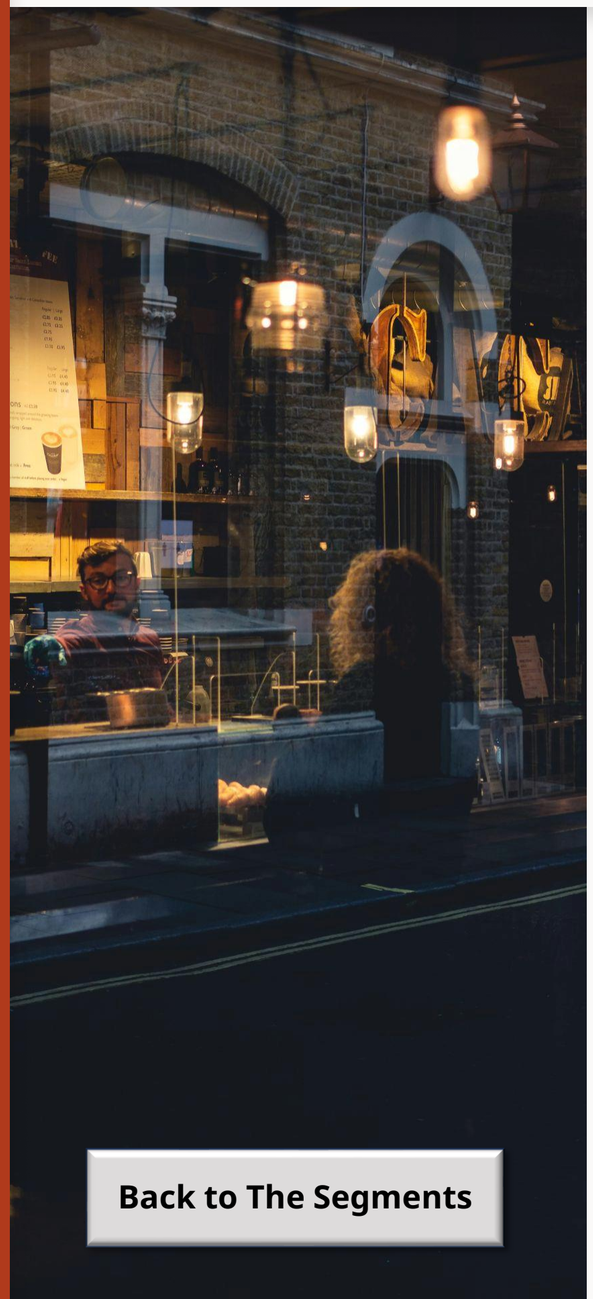
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Audience Segment Portraits

Metroculturals



Back to The Segments

Affluent, culturally confident and socially conscious, this city-based group thrives on meaningful engagement with arts and culture.



Level of interest

12% **1.2 million**

of adults aged 18+ in the target area fall into this segment



Live and **work near** the city

Relevance to the City & Cultural Strategy

RETAIN

Metroculturals are the backbone of the London audience and a high proportion of the population in the City's walking distance. Retaining their interest, and maintaining market share, are key to economic and positioning goals of the Strategy, particularly outlined in the commitment to 'Embrace Culture as a Defining Strength':

- The segment most likely to be interested in high quality, varied and international culture, and likely to help develop the City's profile in this regard.
- Like **Good Neighbours**, local members of this segment can be interested in creative participation
- Some in this segment are City workers. The strategy identifies culture as a major driver in "earning the commute"

Most Likely to Relate To

- Well-curated, idea-driven events
- Experimental theatre
- Politically engaged exhibitions
- Architectural walking tours
- High-quality classical and contemporary performance

Metroculturals are motivated by “Intellectual stimulation”, “Learning new things” and “Discovering new artists.”

74% of Metroculturals said that they were more likely to visit the City for culture, if “there was more to do there”

Location

- Typically live in surrounding boroughs: Islington, Hackney, Tower Hamlets, Camden, Southwark
- Many work in central London and engage culturally before/after work

Life-Stage & Lifestyle

- Ranges from emerging professionals to older elites
- Career-driven and culturally fluent
- Mix of singles, couples, and families with culturally engaged children

Metroculturals are likely to be well educated. 61% hold a degree or many have post-graduate qualifications

Back to the Index^

Likes and Motivations

- ✔ Quality, relevance, innovation
- ✔ Learning something new
- ✔ Experiencing something exceptional
- ✔ Connecting with likeminded people
- ✔ Staying intellectually and socially active
- ✔ Contributing to London’s cultural landscape
- ✔ Supporting causes and values they care about
- ✔ Intellectually stimulating and socially engaged programming
- ✔ Organisations that reflect their values and interests

Dislikes and Barriers

- ✖ Overly commercial or superficial experiences
- ✖ Generic, insincere communications
- ✖ Poor digital access or low-quality programming
- ✖ Tourist-oriented or out-of-touch venues
- ✖ Inauthentic or tokenistic experiences

Programming

- Cutting-edge, high-quality, topical work
- Boundary-pushing theatre, contemporary dance, major exhibitions
- Culture as social commentary and dialogue
- Attracted to political, global, or socially nuanced themes

Place and Time

- Prefer evening and weekend engagement
- Lunchtime events work for those who work in the City
- Visit Barbican, Guildhall Art Gallery, City pop-ups, festivals
- Drawn to cultural use of public spaces and unusual venues

Price

- Willing to pay for premium experiences
- Expect quality and exclusivity
- Respond well to priority booking, VIP upgrades, exclusive events
- Prefer enhancements over discounts



EXAMPLE:

Unravel: The Power and Politics of Textiles in Art

Barbican 2024

The majority of Metroculturals have attended a museum or gallery in the last year. They are also willing to attend cultural offerings on both weekday daytimes and evenings.

Communications

- Best reached via tailored, editorial-style content
- Effective channels: curated email, targeted Instagram/Twitter, LinkedIn
- Prefer intelligent, personalised writing
- Trusted media: The Guardian, Financial Times, specialist newsletters

Community

- Engage through professional or value-based communities
- Attend events as part of broader social life
- May join patron groups, arts foundations, professional societies
- Culturally influential within professional and online network
- Significant contributors through donations, patronage, advocacy

Co-creation

- Rarely engage in grassroots co-creation
- Open to advisory roles, panel discussions, curated collaborations

78% of Metroculturals said they were more likely to attend events in the City if “I knew what was available there.”

Perceptions of the City

- Appreciate heritage and architecture
- May find the City overly commercial or sterile outside work hours
- Respond to activity that subverts the City's image
- Enjoy contemporary work in historic settings and access to hidden spaces

What they do in the City

- Attend Barbican events across artforms
- Visit exhibitions and heritage shows at Guildhall
- Join curated walks, speaker events, themed festivals
- Visit restaurants and bars around cultural events
- Contribute meaningfully to the local Square Mile economy

Potential Barriers

- Perceive the City as functional rather than cultural
- Tend to commute out after work
- Put off by programming that feels corporate or outdated
- Poor digital experience harms engagement
- Increasingly attentive to sustainability and ethical venue practices

Key stat: Describe the City as "Unique" (46%, index 134), "Corporate" (32%, index 133), "Modern" (37%, index 125), "Interesting" (53%, index 111

90% of Metroculturals have visited the City in the last 3 years

Brand Messaging

Should emphasise:

- Thought leadership
- Artistic excellence
- Cultural relevance
- Social impact

Avoid:

- Tokenism
- Over-selling

Resonant phrases:

> Intellectually provocative

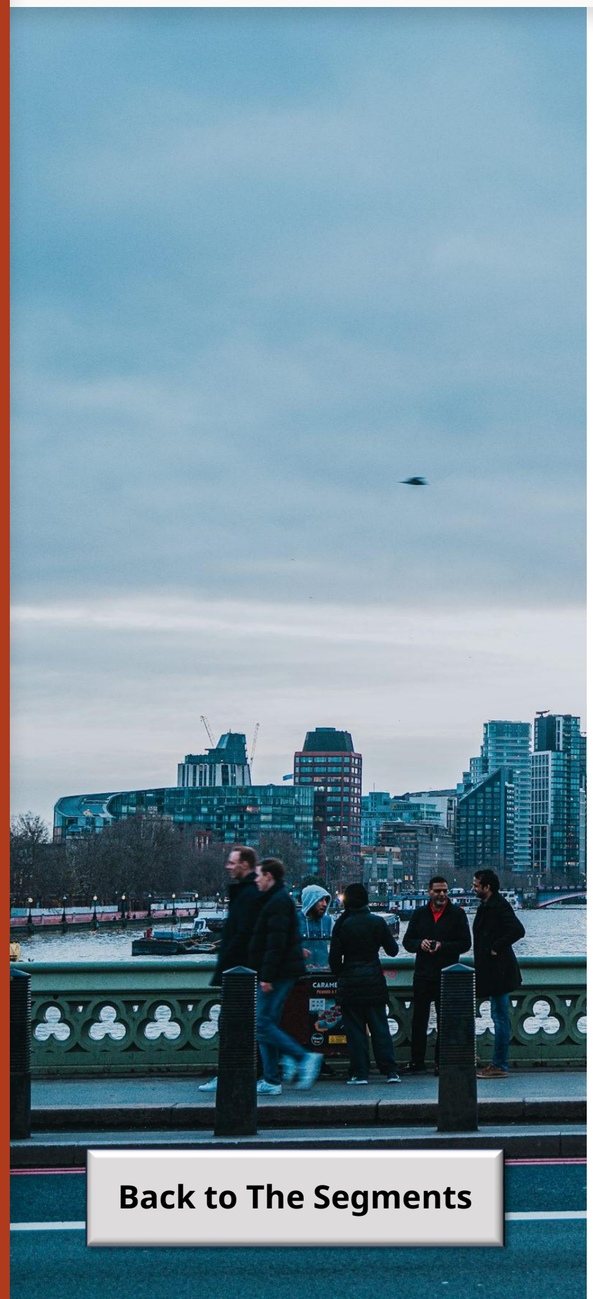
> Culturally pioneering

> Exclusive access

> Art with purpose

> Be part of the conversation

Urban Explorers



Back to The Segments

Young, curious and always on the lookout for what's new, this group thrives on variety, creativity and shared cultural experiences across the city.



Level of interest

6% 630,000

of adults aged 18+ in the target area fall into this segment



Live near and **work** in nearby boroughs

Relevance to the City & Cultural Strategy

GROW

Younger Urban Explorers are key to building a next generation audiences.

They are most likely to:

- Support new and independent cultural offers/alternative formats
- Take up opportunities to get involved with professional creative offers
- Outcomes of the Strategy's Commitment 'Share the City's Stories' and 'Create Space to Support New Cultural Ideas' are likely to encourage this segment to the City

Most Likely to Relate To

- ‘Instagramable’ events
- Pop-up’s, Art trails, immersive events
- Politically engaged exhibitions
- Late night programming

They are motivated by discovery, fun and self-expression. Attendance is regular and spontaneous, often sparked by a friend’s recommendation, a viral post or a unique one-off experience.

65% of Urban Explorers are motivated to attend programming that allows them to “experience another culture”

Location

- Typically live in surrounding boroughs: Hackney, Tower Hamlets, Camden, Southwark and Islington
- They don’t normally reside or work in the City

Life-Stage & Lifestyle

- Predominantly 20 to 40 years old
- Mix of early-career professionals, mid-life creatives, graduates and freelancers
- Living in shared accommodation or compact city flats

This group well educated - 56% hold a degree or higher. 15% full-time students

Likes and Motivations

- ✔ Connecting with likeminded people
- ✔ Culture that reflects their own lives
- ✔ Trendy events that feed well into their online presence
- ✔ Experiences that combine politics, aesthetics and fun
- ✔ Hybrid experiences that mix unusual ingredients – contrasting artists, work in found spaces
- ✔ Immersive, participatory elements
- ✔ Authentic cultural offerings that reflect the real world
- ✔ Programming that is grounded in themes of identity and community
- ✔ Unusual experiences with an artist-led, DIY atmosphere

Dislikes and Barriers

- ✖ Overly commercial or superficial experiences
- ✖ Exclusive or elitist atmosphere
- ✖ Over-priced tickets
- ✖ Unsociable venues
- ✖ Inauthentic or tokenistic experiences

Programming

- Experimental, social and meaningful
- Genre-bending experiences
- Tangible and authentic
- Attracted to political, and socially engaged programming
- Platforming the voices of the marginalised

Place and Time

- Prefer evening and weekend engagement
- Visit Barbican, Guildhall Art Gallery, City pop-ups, festivals, Museum of London
- Drawn to cultural use of public spaces and unusual venues

Price

- Prefer affordable or free programming
- Willing to pay for events that seem valuable; ethical alignment or instagramable experiences justify a higher price point
- Respond well to early-bird tickets or ‘pay-as-you-feel’ models



EXAMPLE:

WAKE

Sadlers Well 2025

Urban Explorers are attracted to programming such as film screenings, zine fairs, exhibition lates and events that platform emerging talent

Communications

- Best reached via social media
- They respond well to slick visuals with a cool aesthetic that quickly communicate the ‘vibe’ of an experience
- Lead with the atmosphere of the programming rather than logistical formalities
- Urban Explorers don’t want to be sold to, they want a two-way conversation

Community

- They go to connect, belong and participate in something they feel passionate about or are inspired by
- They follow culture that reflects their own personal community
- They also view culture as a social connector, and are likely to attend with friends and their creative circles

Co-creation

- Highly receptive to co-creation, they’re eager to contribute ideas, perform, co-curate, or volunteer for events they believe in
- They respond well to open calls, workshops, and collaborative campaigns where their voice and identity are genuinely reflected.

80% of Urban Explorers agree that they would be more likely to attend events in the City “if I knew what was available”

Perceptions of the City

- Corporate and disconnected from their lives
- May feel the City is too expensive or not for them
- Respond to activity that subverts the City's image

What they do in the City

- As it stands the City isn't currently a leisure destination for this group
- Occasionally visit specific exhibitions and events at the cultural venues in the area
- The Barbican is likely to be the biggest attractor for this group

Potential Barriers

- Lack of grassroots and authentic cultural experiences
- Expensive ticketing
- Put off by overly formal atmosphere
- Programming seems designed for professionals and tourists, not local communities
- Urban Explorers are culturally active in evenings and weekends, when the City is seems closed for business



While this group isn't necessarily coming to the City for culture, 89% said they had visited the square mile in the last 3 years, meaning there is an opportunity to capture this group with the right programming.

Brand Messaging

Should emphasise:

- Authenticity
- Community ties
- Cultural relevance
- Social impact

Avoid:

- Tokenism
- Jargonistic language

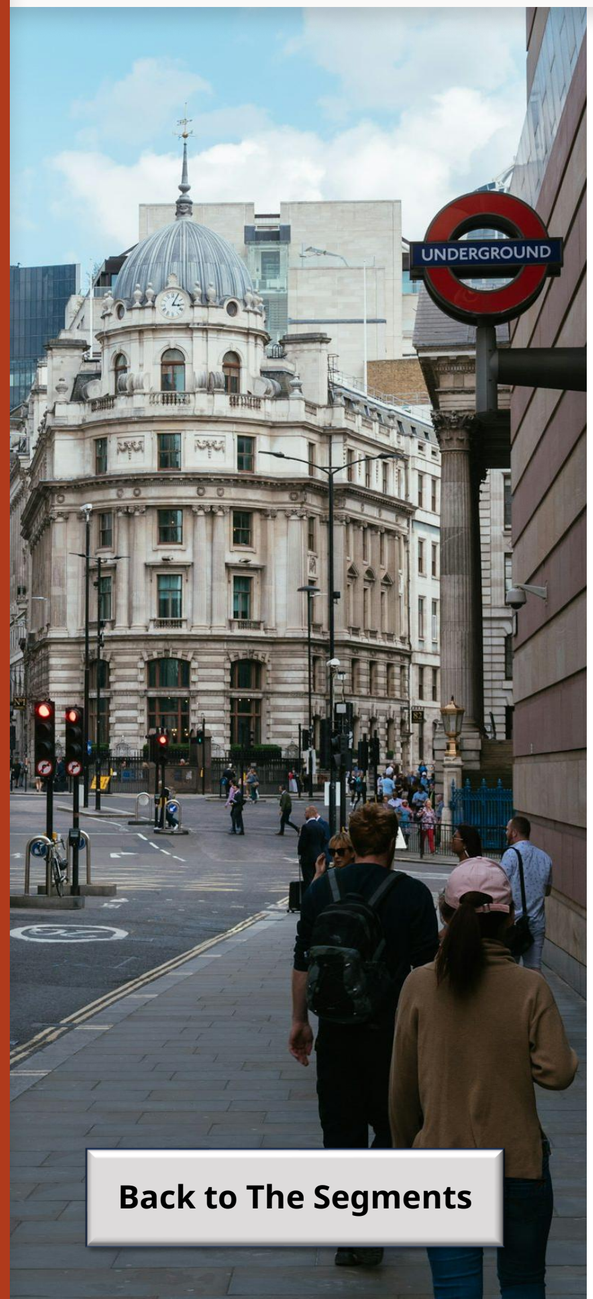
Resonant phrases:

> Pay what you can

> Artist-led

> Socially engaged

Culture Fix



Back to The Segments

Discerning and well informed, this group travels into London in search of standout cultural moments that are worth the journey.



Level of interest

8% 850,000

of adults aged 18+ in the target area fall into this segment



Live and **work** in affluent towns in the South- East

Relevance to the City & Cultural Strategy

ATTRACT

Arts-interested Culture Fix are key to boosting the visitor economy from the wider South East. High-value visitors that will plan and book in advance, they are likely to:

- Buy premium seats, membership schemes and donate onsite
- Recommend the City as a destination for cultural tourism
- Support the wider economy by dining out, shopping and staying overnight

Attracting this segment would likely increase spend in the City and therefore meet Destination City's economic objectives.

Most Likely to Relate To

- Flagship events, major exhibitions and top-tier performances
- Classical music, architecture, museum exhibitions
- Well presented content that is easy to navigate
- Recognisable names, institutions and themes

Culture Fix live outside the capital, often in affluent towns or commuter belt areas, but view London and the Square Mile as a place for special visits

76% of Cultural Tourists favour “areas with a calm atmosphere”

Location

- Typically live in affluent towns and rural areas around the South East
- They are familiar with commuting into London, with many working in the capital
- The City represents a convenient and special cultural destination for this group

Life-Stage & Lifestyle

- Mix of mature couples and high-earning families or individuals
- Settled, well-informed and culturally confident
- Cultural visits to London are a welcome treat, they will plan a whole day or weekend

They are confident cultural consumers who plan their outings carefully, choosing events and venues that promise quality, insight and a sense of occasion

Likes and Motivations

- ✔ Learning something new
- ✔ Enriching and entertaining events
- ✔ Connecting with history
- ✔ Sharing experiences with others
- ✔ Staying intellectually and socially active
- ✔ Well-rounded programming that feeds into other activities such as dining out and shopping
- ✔ Quality and Clarity

Dislikes and Barriers

- ✖ They dislike hassle or anything that seems difficult to plan
- ✖ Unclear information
- ✖ Long queues and confusing access arrangements
- ✖ Poor customer service and unclear signage
- ✖ Programming that is too experimental or niche

Programming

- Established and high-profile exhibitions and performances
- Talks by well-known people
- Heritage-focussed content
- Crossovers between art and architecture, music and literature, or history and performance work well for them

Place and Time

- Prefer daytime visits, especially at weekends or during school holidays
- Many prefer matinees or lunchtime events
- Some may also attend evening events if linked with dinner or an overnight stay

Price

- Willing to pay for the right experience
- They don't expect discounts, but they do expect clear value
- Package offers combining travel, lunch or multiple venue access are attractive, as are early booking benefits and exclusive access options

83% agree they would be more likely to visit the City "if it was cheaper" or "more accessible"

65% would visit the City on weekend evenings

Communications

- Best reached via curated content, direct mail brochures and targeted newsletters work well
- Effective publications include The Times, The Telegraph or The Guardian
- They also respond well to personalised suggestions based on previous attendance
- Accessible websites and good reviews work well for Cultural Tourists

Community

- Their sense of community comes from the institutions they visit as opposed to geographic locality
- They're likely to be members of organisations such as National Trust, Art Fund, English Heritage
- May visit with small social groups and will often respond to personal recommendations

Co-creation

- Rarely engage in participatory activity
- Opportunities to contribute expertise, shape direction, or act as cultural ambassadors are often of interest

Perceptions of the City

- They see the City of London as a place of history, architecture, and quiet prestige
- It feels more serious, less touristy
- They appreciate its walkability, historical depth, and the blend of old and new

What they do in the City

- They visit the multitude of heritage spots in the square mile such as St. Pauls Cathedral and Tower Bridge. They would likely enjoy guided tours of these locations
- Likely to combine different engagement opportunities whilst visiting the City, they will go to art exhibitions and performances, whilst soaking up the food and entertainment that is on offer

Potential Barriers

- Logistical barriers may affect Cultural Tourists; unclear journey planning, and early closing times can deter visits
- A lack of awareness of what's available in the City could affect whether they come at all
- Marketing that assumes local knowledge could be alienating to them
- Cultural Tourists are looking for a complete visit, with a variety of offers that will contribute to a well-rounded trip, the City's offer could be viewed as limited

Key stat: Cultural Tourists describe the City as "**Inclusive**" (30%, index 179), "**Varied**" (29%, index 135), "**Diverse**" (45%, index 128), "**Exciting**" (45%, index 124)

Brand Messaging

Should emphasise:

- High quality offers
- Ease of access
- ‘Day-out’ packages
- Social impact

Avoid:

- Casual language
- Vague instructions

Resonant phrases:

> A world class experience

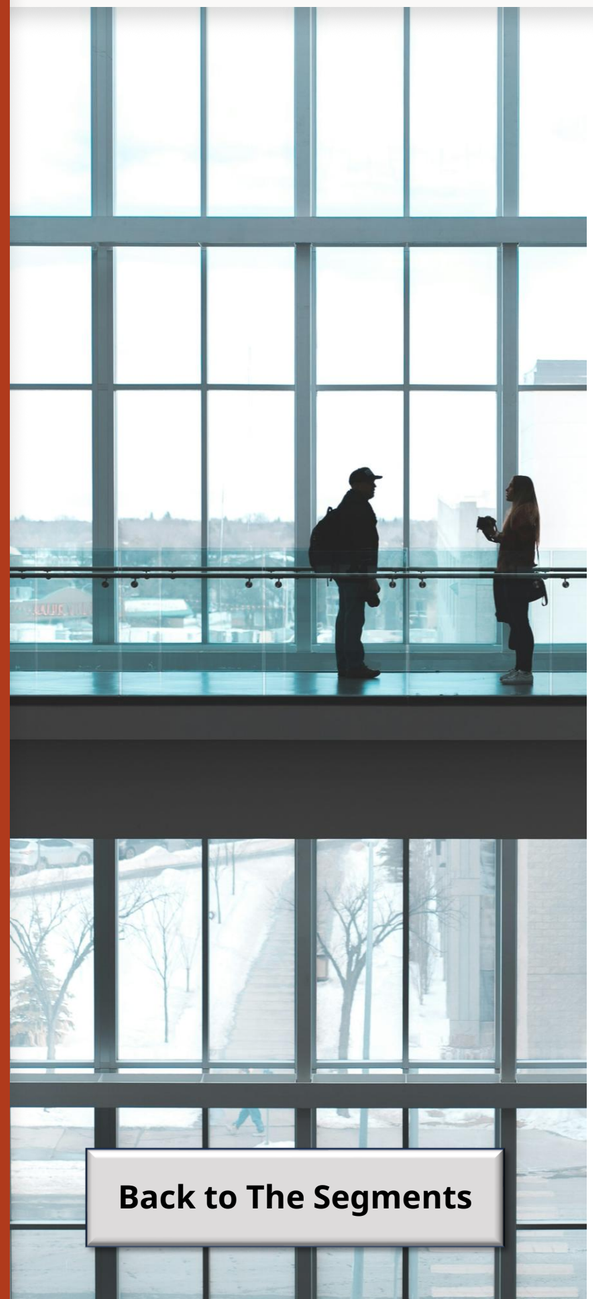
> Explore. Engage. Belong.

> Culture, curated for you

> Where ideas take centre stage

> Tradition, reimagined

City Connoisseurs



Back to The Segments

Professionally driven and culturally selective, this group blends their working life in the City with a deep appreciation for high quality cultural experiences.



Level of interest

3% 320,000

of adults aged 18+ in the target area fall into this segment



Live in London and commuter towns. **Work** in and around the City

Relevance to the City & Cultural Strategy — Retain

Commuters from the leafy suburbs, culture vulture City Connoisseurs work in the City and are key to retaining market share and building mid-week audiences. More traditional in their tastes than Metroculturals, they are likely to:

- spend more on experiences, contributing through tickets, memberships, hospitality
- influence others, especially within professional networks
- help sustain midweek offers, and take up corporate sponsorship

Most Likely to Relate To

- Intellectual exhibitions
- Contemporary music
- Public Art
- Academic talks
- Programming that allows a cross-over between culture and business

Location

- This group lives in leafier inner and outer London Boroughs and the stockbroker belt
- Many work in and around the City, they know the square mile well and move through it regularly as part of their professional lives

Life-Stage & Lifestyle

- High earning professionals over between the ages of 30 to 60
- A mix of mid-career and senior leaders
- Time poor but culturally engaged
- Strong professional networks
- Often juggling personal and professional commitments, they need experiences that are flexible but offer substance

This group values prestige, trust and reputation. For City-based venues, this makes them an ideal audience for members' events, corporate partnerships, or after work programming that respects their time while enriching their day.

Likes and Motivations

- ✔ Learning something new
- ✔ Social interaction and ability to attend whilst networking
- ✔ Staying intellectually active
- ✔ Feeling connected to London's cultural scene
- ✔ Flexible programming that fits around their other commitments
- ✔ Quality, convenience, relevance
- ✔ Convenient timings and locations that work around their work schedules
- ✔ Programming that can be paired with networking – the social experience matters

Dislikes and Barriers

- ✖ Opening times that do not extend beyond the working day
- ✖ Mainstream, or gimmicky content
- ✖ Unclear information and difficult booking systems
- ✖ Vague information and poorly framed offer, they want to know exactly what it is, when its happening and how to book

Programming

- High standard offers
- Insight rich programming
- Museum grade exhibitions
- Panel discussions
- Content linked to their professional interests; economics, law, innovation etc
- Outdoor installations and public art that they can drop by to see
- Spaces of quiet reflection are appreciated during the working day also

Place and Time

- After work events and weekday lunchtimes work well for this group
- Ability to drop in without a time commitment
- Popular venues include the Barbican, Guildhall Art Gallery, Bloomberg SPACE, and St Stephen Walbrook

Price

- Willing to pay for premium experiences
- Value efficiency over discounts
- Respond well to free or low-cost lunchtime programming that they can drop into with their colleagues

City Connoisseurs see culture not just as leisure, but as part of a well-rounded life. Whether it's a lunchtime recital, a post-work exhibition opening, or an early evening talk, they favour experiences that are stimulating, well-produced and efficiently run.

Communications

- Messaging should be efficient and informed
- Clear information about timing, access and content
- Well targeted by internal comms through corporate partnerships
- Professional tone, mirroring the language of publications such as The Financial Times would work well

Community

- Their community is professional rather than local
- Many are part of professional societies or patron groups.
- Cultural activity is often shared with others in their field, or used to network informally

Co-creation

- Rarely engage in traditional co-creation
- Open to long-term support roles, including trustee positions or strategic fundraising partnerships

City Connoisseurs appreciate programming that acknowledges and caters to a blend of social and professional identities

Perceptions of the City

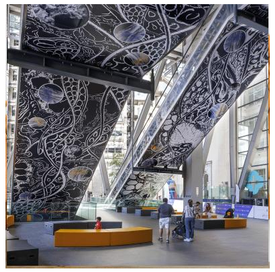
- See the City as their professional base
- They appreciate its history, architecture and cultural offer but may not always have the time to explore it fully
- May feel the City is disconnected after-hours

What they do in the City

- Attend the Barbican or Guildhall at lunch
- Visit public events and artworks
- Visit restaurants and bars after work with professional contacts
- Use café spaces, reading rooms or galleries to take a break from their working day

Potential Barriers

- Poor timing of events that do not align with their schedules
- If a cultural offer isn't clearly visible or easy to integrate into a working day, it will be missed
- Unclear booking processes
- Lack of after-hours events



EXAMPLE:

Sculpture in the City

Ongoing

Brand Messaging

Should emphasise:

- Ease of planning
- High quality programming
- Brief and to the point

Avoid:

- Overly casual language
- Vague information

Resonant phrases:

> Thinking space

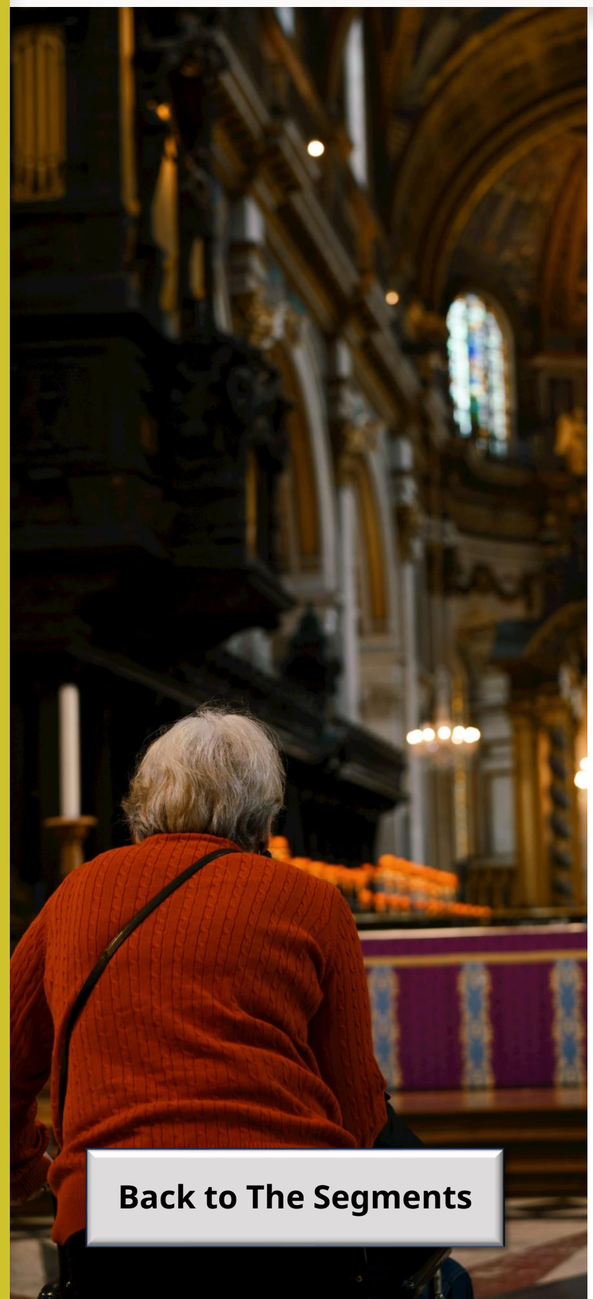
> Ideas after hours

> Culture and cocktails

> City evenings

> 5pm unwind

Heritage Visitors



Back to The Segments

Mostly retired and moderately culturally engaged, this settled group values tradition, community, and heritage.



Level of interest

9% 880,000

of adults aged 18+ in the target area fall into this segment

Visit the city

Relevance to the City & Cultural Strategy

Attract

Older Heritage Visitors are in search of hidden gems, motivated to explore the City's rich history, and open to visiting in off-peak hours. Improvements to the overall visitor experience are likely to encourage them. Heritage visitors:

- Contribute to the off-peak visitor economy
- Be willing to visit during off-peak hours and weekends
- Respond positively to improved facilities and signposting in line with the strategy's Commitment to 'Getting the Basics Right' and in addition, 'Bring the City's Hidden Gems Into Public View' will also attract visitors in greater numbers.

Most Likely to Relate To

- Heritage-rich experiences
- Guided museum tours
- Traditional theatre and classical music
- Well know venues
- Familiar formats

Heritage Visitors see culture as a meaningful way to stay connected to their community and traditions.

64% of Heritage Visitors favour “historical surroundings”

Location

- Heritage Visitors live in commuter belt towns and suburban areas with good links into London
- Typically reside in areas such as Hertfordshire, Surrey, Buckinghamshire, Berkshire and the outer London Boroughs

Life-Stage & Lifestyle

- Mostly retired or nearing retirement
- Fewer day to day obligations compared to the other segments
- Financially comfortable but careful with money
- Culture is an occasional but meaningful day out

Based just outside of London, they are cost-aware but loyal, making them a strategic audience for the city's many heritage offerings.

Likes and Motivations

- ✓ Day-time events
- ✓ Trusted venues
- ✓ Accessible venues that feel low pressure
- ✓ Traditional, heritage focussed content
- ✓ Content that is easy to understand
- ✓ Traditional and classical performances
- ✓ History focussed museum exhibitions

Dislikes and Barriers

- ✗ Niche programming that feels out of their comfort zone
- ✗ Difficult booking processes
- ✗ Poor accessibility

Programming

- Familiar and traditional
- Traditional performances
- Content focussed on local history
- Heritage focussed
- Family friendly and social
- Guided heritage walking tours

Place and Time

- Daytime
- Familiar venues
- While many in this group have more flexible time, especially during the day, they still appreciate thoughtful scheduling that fits around family and other social commitments

Price

- Financially comfortable but value driven, willing to spend extra on something that caters to their values and interests.
- Group packages for matinee performances or daytime events could entice this group to loosen their purse strings

64% of Heritage Visitors visited areas outside of London for culture within the last 12 months, indicating their desire to partake in cultural activity

Communications

- Clear, friendly, and familiar language
- Printed communications as this group is not online
- Word of mouth recommendations go a long way with Heritage Visitors
- Positioning cultural offers as an occasional treat to enjoy with friends and family

Community

- Heritage Visitors strongly value community, they enjoy familiarity and upholding traditions
- Attend events with friends and family, making memories is important
- Motivated by the idea of preserving local stories, history, and heritage

Co-creation

- Not drawn to co-creation, they prefer to consume mainstream offerings passively
- Having said this, if co-creation activity is framed as sharing knowledge and preserving heritage, they could be open to it. They may also enjoy volunteering.

Perceptions of the City

- Impressed by the grandeur and history
- May find the City overly corporate
- Difficult to access
- May view the City as expensive and unwelcoming

What they do in the City

- There is an abundance of culture that already exists in the city that would appeal to Heritage Visitors. St Paul's Cathedral, The Tower of London and the Roman ruins are all examples of culture that this group would enjoy exploring once in the city.

Potential Barriers

- Perceive the City as a place of business rather than a cultural destination
- Difficulty in getting to the square mile
- Thinking the City is too expensive and fast paced

58% of Heritage Visitors describe the City as “expensive”, however 68% also describe it as “historic”. This indicates that, with the right messaging, this group could be captured by the cultural scene that the city has to offer.

Brand Messaging

Should emphasise:

- Traditional content
- Ease of access
- Group deals
- Comfort and convenience

Avoid:

- Jargonistic language
- Niche content

Resonant phrases:

“

Timeless

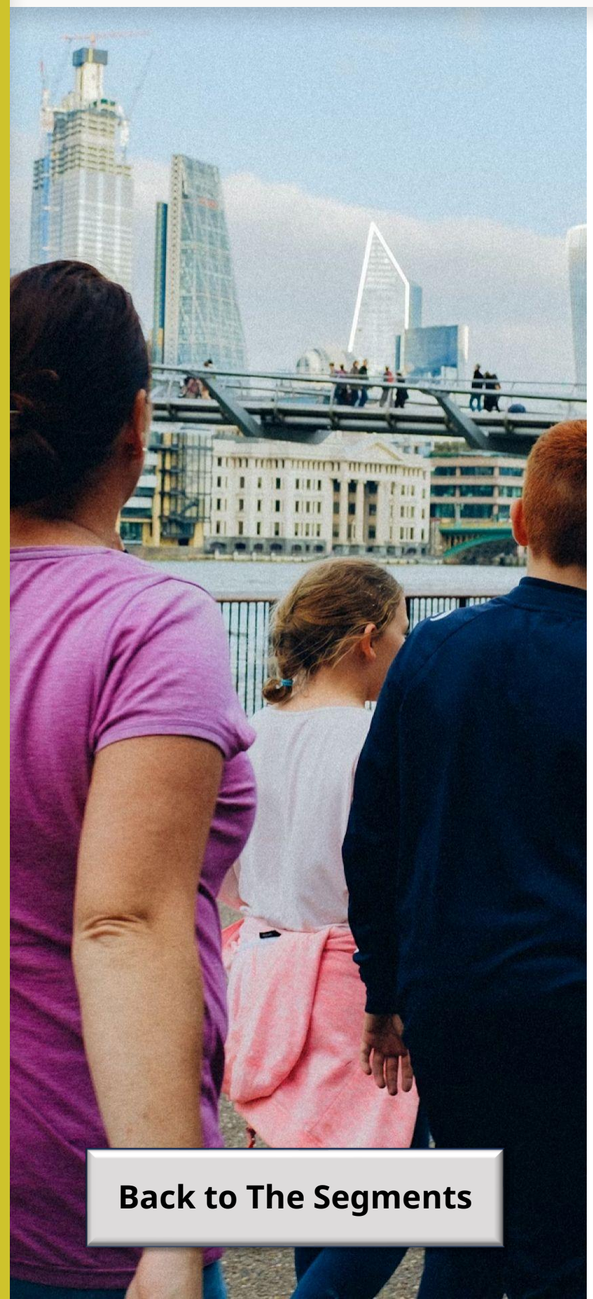
Heritage-rich

Local tradition

Enjoy at your own pace

Daytime discounts and group offers

Family Day-trippers



Back to The Segments

Busy, family focused and always planning the next day out, this group looks for fun, good value and memorable experiences to enjoy together.



Level of interest

9% 910,000

of adults aged 18+ in the target area fall into this segment

Visit the city

Relevance to the City & Cultural Strategy

Connect

This group are strategically important as a new potential family visitor market, and to introduce children and young people to the City and what it has to offer. They are:

- Key target group for family offers
- Likely to be attracted by improvements to access, “the basics” and navigability if there are suitable family offerings available at the right times.
- Socially, they could raise the City’s profile as a place welcoming to families.

Most Likely to Relate To

- Popular, recognisable content
- Interactive exhibitions
- Family concerts
- Outdoor events, drop-in activities, are particularly successful

Family Day-trippers are based in the home counties and tend to travel into London during weekends and school holidays

41% of Family Day-trippers have attained A-Levels as their highest level of education

Location

- Living in suburban towns across the South East, places such as Hertford, Chelmsford and Reading
- Many will plan a whole day out in London, focussed on one or two key activities in the capital

Life-Stage & Lifestyle

- Family households, with children ranging from toddlers to teens
- Parents are working professionals, but their leisure time is focussed on family
- They willl often visit with other families or extended relatives

With children of different ages and often multiple generations in tow, they are looking for cultural experiences that are entertaining, accessible and easy to build into a full day out

Likes and Motivations

- ✓ Spending quality time with the family
- ✓ Exposing their children to positive cultural experiences
- ✓ Ease of planning
- ✓ Family offers
- ✓ Programming that appeals to the whole family
- ✓ Interactive content

Dislikes and Barriers

- ✗ Unclear age suitability
- ✗ Busyness and long queues
- ✗ Poor family facilities
- ✗ Difficult booking systems and overpriced tickets
- ✗ Overly academic or serious programming

Programming

- Lively, familiar and interactive
- Theatre adaptations of children's stories
- Creative workshops
- Seasonal events
- Curricular relevant topics

Place and Time

- Weekends and school holidays
- Mid-morning arrival
- Locations close to transport links, places to eat and public toilets

Price

- Value conscious but not unwilling to spend
- Family ticket deals, meal and entry packages resonate well
- Multi-event passes and kids-go-free are enticing
- Discounts for off-peak times or advance booking help with decision-making

71% of Family Day-trippers have been to a historic house or heritage site in the last two years.

Communications

- Clear, practical information
- Channels like Facebook, Instagram, family-focused newsletters, and local parenting blogs are effective
- School flyers, train station ads and simple printed leaflets also help
- They need reassurance that the experience will be fun, safe and well-suited to their kids

Community

- Their community is shaped by schools, sports clubs, parenting networks and friendship groups
- They often visit in pairs, two families together, or with grandparents
- They'll share tips and recommendations with their social circles and are very influenced by peer reviews and personal recommendations

Co-creation

- They're not typically looking to co-create or participate as individuals, but they're happy to join in where it benefits their children, e.g. interactive shows, drop-in crafts, or other hands-on workshops. Children's involvement is key, if a child is active and engaged, the parents are more likely to feel it's a success

Perceptions of the City

- View the City as clean and serious
- May not associate the City as being for families
- The hidden gardens, wide pavements, and free museums could make it feel accessible and different from more crowded areas like the West End, if these elements were highlighted to this group

What they do in the city

- Attend the cultural venues family programming
- Self-led walking trails
- Family workshops
- Stop for lunch and snacks
- Shop in gift shops

Potential Barriers

- Wayfinding can be a challenge
- If the family offer isn't clear, they will opt for other activities in London
- Overpriced ticketing
- Lack of family facilities and child friendly restaurants
- Perception that the City isn't for families

Brand Messaging

Should emphasise:

- Family facilities
- Programming for the whole family
- Ease of planning
- Family offers and deals

Avoid:

- Serious or academic language
- Vague information

Resonant phrases:

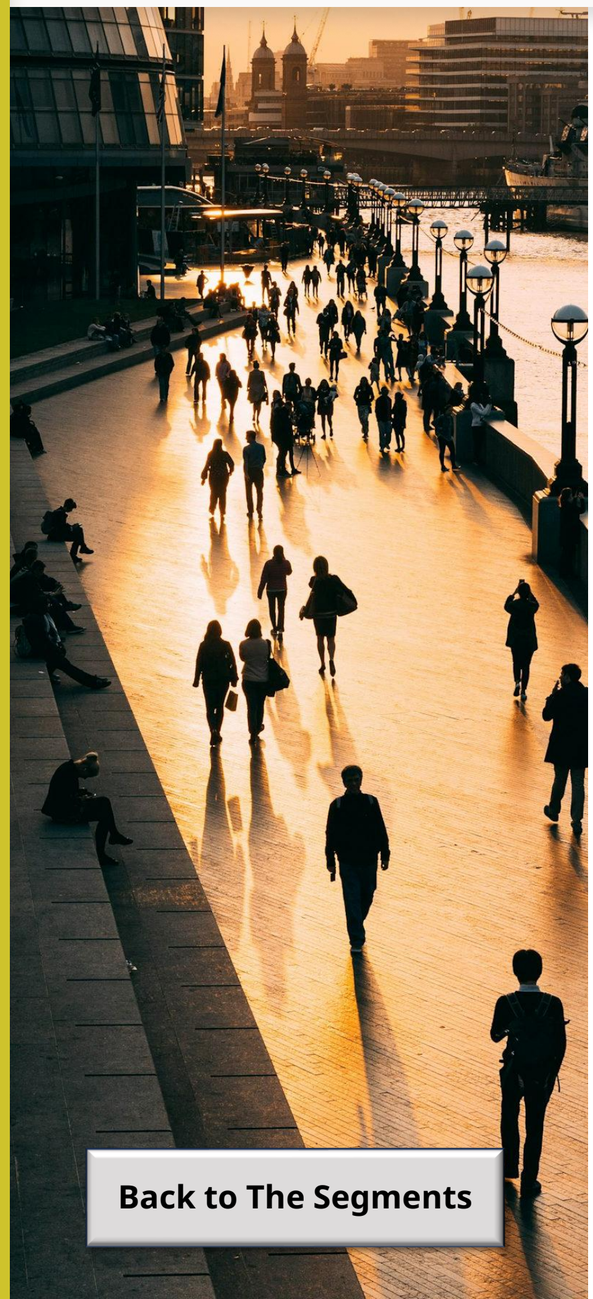
> A great day out for the whole family

> Explore, play, and learn

> Family tickets

> Kids go free

City Casuals



Back to The Segments

Practical, sociable and habit-driven, this group is open to cultural experiences when they're easy, familiar and fit neatly around work and family life.



Level of interest

1% 60,000

of adults aged 18+ in the target area fall into this segment



Work in and around the City

Relevant for the City & Cultural Strategy

Grow

As younger workers, City Casuals could expand off-peak audiences and influence others. They are the key group who feel open, street-level and social cultural experiences might "earn the commute", where they are a good fit with their busy lives. They can:

- Contribute to weekday attendance
- While not big spenders - buy tickets, snacks or drinks, and bring friends
- Shift the perception of the City to inclusive and enjoyable, not just a place of business

The strategy's commitment to 'Extend Culture Beyond Buildings' is likely to grow this audience whilst also retaining City Connoisseurs.

Most Likely to Relate To

- Mainstream content
- Social events
- Music nights, lunchtime events and anything with a fun and friendly tone
- Logistically and intellectually easy to access programming

Location

- Live outside of central London in commuter towns; Romford, Sidcup, Croydon, Watford
- Many work in and around the square mile
- Not actively seeking out culture but they are open to spontaneous or easy options

Life-Stage & Lifestyle

- Mid-life workers in their 30s to 50s
- Structured routines and modest cultural habits
- They’re practical, family oriented and tend to engage with culture when it fits into their schedule

City Casuals work in or around the Square Mile, often in stable roles across office-based sectors; admin, or service industries. While they don’t necessarily seek out culture, they’re happy to engage with it when it’s convenient, affordable and feels like a nice reward after work

Programming

- Upbeat, accessible content
- Live music, comedy nights, popular films, seasonal events, and drop-in exhibitions with a social or interactive element
- Informal formats that don't require insider knowledge or prior familiarity

Place and Time

- Weekday lunchtimes and early evenings
- They're unlikely to travel into the City on weekends but are open to something that's already on their way home
- Venues near key commuter routes
- Rooftop events, riverside installations or courtyard cafés also appeal for their relaxed, informal atmosphere

Price

- Good value activities
- Offers and discounts work well, Bundle deals, ticket plus drink, work well
- They may spend on food or drink during an event, especially if there's a social angle
- Prefer enhancements over discounts

City Casuals see culture as an occasional treat, not a lifestyle. They're most likely to attend something that's been recommended by a friend or advertised in a clear and straightforward way

Communications

- They respond well to plain language and clear information
- Effective channels include posters on their commuting routes, email newsletters and targeted social media posts

Community

- Their sense of community is rooted in workmates, family life and local friendship networks
- They're likely to attend with a colleague or friend after hours and enjoy events where they feel part of a crowd, but without pressure to participate
- Word of mouth and local buzz play a role, if they see others like them attending, they're more likely to give it a go

Co-creation

- Rarely engage in co-creation
- Open to engaging passively such as voting for something or tagging on social media
- They're more comfortable as observers or attendees than active contributors but can be drawn into light-touch, interactive elements

The City of London holds appeal for this group as part of their everyday routine, a quick lunchtime drop-in, a relaxed after-work event. Loyalty grows when the experience is easy, enjoyable and offers a bit more than expected.

Likes and Motivations

- ✓ Social and low effort experiences
- ✓ Programming they can drop into after work with a friend or colleague
- ✓ Fun and valuable experiences
- ✓ Enjoy partaking in culture to add variety to their schedule and feel like they're doing something ‘a bit different’
- ✓ Feeling like a part of the buzz of the city

Dislikes and Barriers

- ✗ Overly intellectual or confusing programming
- ✗ Intimidating or pretentious atmospheres
- ✗ Complex booking systems or unclear pricing
- ✗ Experimental and unfamiliar content

Perceptions of the City

- City Casuals see the City as smart and professional
- Do not associate it with fun or family activity
- They enjoy discovering something cultural during their working day, especially if it doesn't feel like too much of a stretch. Programming such as Sculpture in the City was likely to have resonated well with this group

What they do in the City

- Attend afterr work events and exhibitions
- Attend lunchtime programming or public art installations
- Occasionally book into evening shows if timed well with work
- Seasonal events
- Visit low-key bars and restaurants with friends after work

Potential Barriers

- They may assume cultural activity in the City is *not for them* if it isn't clearly promoted
- Overly formal presentation or inconvenient timing can all reduce engagement
- If the experience doesn't feel welcoming, simple or worthwhile, they'll opt for more familiar leisure activities instead

Brand Messaging

Should emphasise:

- Welcoming atmosphere
- Social elements
- Casual vibe
- Ease of planning
- Lunchtime or after work hours

Avoid:

- Jargonistic language
- Assumptions of prior knowledge

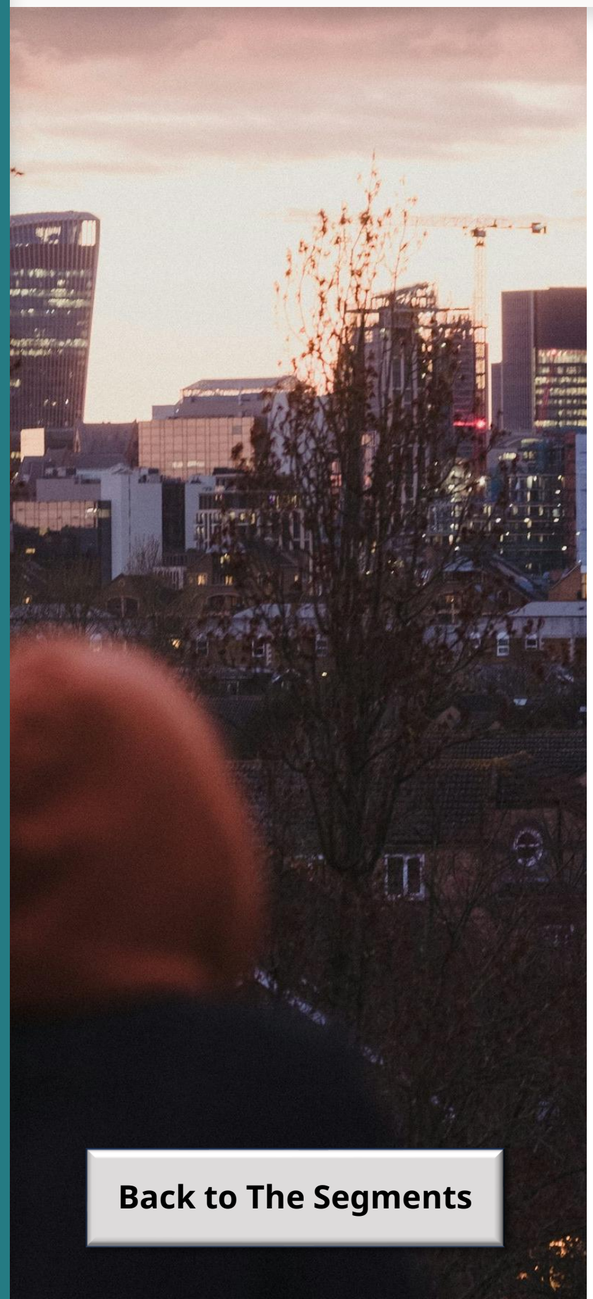
Resonant phrases:

> Quick to book

> Pop by after work

> No fuss, just fun

Doorstep Families



Lively, diverse and community oriented, this family focused group is always on the lookout for fun, affordable ways to spend quality time close to home



Level of interest

2% 170,000

of adults aged 18+ in the target area fall into this segment or Good Neighbours

Live and **work near** City/ surrounding boroughs, often social housing or rented

Relevance to the City & Cultural Strategy

Connect

Doorstep Families are key to developing relationships with the City's diverse and local audiences, especially under-represented families seeking local opportunities. They can:

- Help make cultural spaces more inclusive and reflective of the City's diversity
- Spend on snacks, travel or affordable tickets
- Help shift perceptions of the City to welcoming and connected to community
- Introduce young people to cultural opportunities which aligns with the strategy's Commitment to 'Build Early Connections to Culture'

Back to The Segments

Most Likely to Relate To

- Culturally specific programming
- Fun and social events that they can attend with friends and family
- Seasonal events
- Opportunities to participate

Location

- Doorstep Families live in inner-city boroughs surrounding the square mile
- Pass through the City on their way to work and school

Life-Stage & Lifestyle

- Lower income families, often juggling work, family life and school routines
- Many have young children or teens
- Their cultural activity is driven by family interests and opportunities to spend time together outside the home

Doorstep Families live in ethnically diverse neighborhoods just beyond the Square Mile, often in boroughs with strong community networks and limited household budgets

Likes and Motivations

- ✔ Doing things together with friends and family
- ✔ Fun, joyful and celebratory events
- ✔ Creative and sensory experiences
- ✔ Having a break from their daily routines
- ✔ Create memories as a family
- ✔ Providing their kids with the opportunity to learn something new
- ✔ Accessibility, affordability and cultural relevance
- ✔ Experiences that are free or low cost, close to home, and feel designed for families like theirs
- ✔ Programming that celebrates their cultural heritage

Dislikes and Barriers

- ✖ Expensive ticketing
- ✖ Content that is hard to understand
- ✖ Intimidating atmospheres
- ✖ Lack of family facilities
- ✖ Inauthentic or tokenistic experiences
- ✖ Overly formal or professional venues that feel disconnected from their lives

Programming

- Interactive content; Music workshops, dance sessions, outdoor performances, community festivals
- Creative play areas
- Food festivals that celebrate diverse cultures

Place and Time

- Weekends and school holidays
- They’re more likely to attend if events are promoted through schools, community centers or housing networks
- Venues near major transport hubs or open public spaces are easier to reach and feel more approachable

Price

- Free or low cost
- Pay what you can and family discounts work well
- Clear communication around pricing, including what’s free and what’s not, helps build trust. Offering low-cost extras like snacks, colouring sheets, or goodie bags can enhance the experience

They see culture as a way to have fun together, get out of the house and try something different, especially during holidays and weekends. Events that are hands on, energetic, and free or good value are especially appealing

Communications

- Best reached via communications through local schools, community groups, Facebook, and posters in local shops or libraries
- Messaging needs to be visual, friendly and straightforward
- Word of mouth and personal invitations from trusted local contacts are especially effective
- Flyers in multiple languages or with clear imagery also help

Community

- Community is everything. Their networks are strong and often hyper-local; Faith groups, schools, extended family, community centres
- Seeing their community reflected in the programme makes all the difference and could lead to return visits or turn special events into annual traditions

Co-creation

- They’re highly receptive to co-creation when it’s meaningful, authentic, and community-led
- Doorstep Families will take part in festivals, share stories, help design events or perform if invited
- Involving parents and children in content development, celebration days, or community showcases builds strong loyalty
- Paid opportunities, free tickets, and school led partnerships also strengthen participation

Perceptions of the City

- The City can feel distant, formal or alienating to Doorstep Families
- It's not automatically seen as a family destination
- The areas complex history may have already created an intergenerational sense of mistrust

What they do in the City

- They attend school holiday events at the cultural venues in the area
- Enjoy free outdoor arts or music

Potential Barriers

- Expensive ticketing
- Lack of family facilities
- Perception of the City as not being for them
- Lack of inclusivity or sense of welcome
- Unfamiliarity can be off putting
- Content that doesn't feel culturally relevant to them

Brand Messaging

Should emphasise:

- Community
- Low cost or free tickets
- Family friendliness

Avoid:

- Jargonistic language
- Exclusive vibes
- Pretentiousness

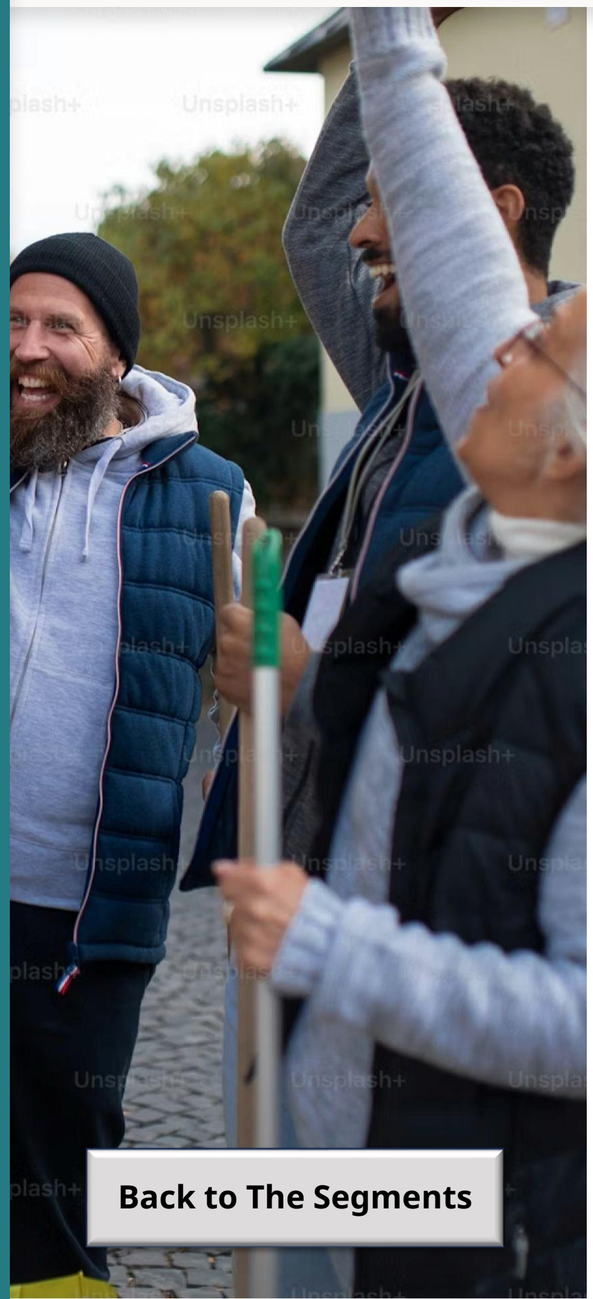
Resonant phrases:

> Celebrate together

> A fun free day out

> Enjoy with the whole family

Good Neighbours



Back to The Segments

Community-minded and proud of where they're from, this group is most engaged when culture reflects their lives and brings people together



Level of interest

2% 170,000

of adults aged 18+ in the target area fall into this segment or Doorstep Families



Live and work near the City – often social housing or rented

Relevance to the City & Cultural Strategy **Connect**

Good Neighbours are a key target group for local, participatory community programming. Working with this group is rewarded by:

- Strong social impact, helping spread word-of-mouth, bringing family and friends, and building long term community trust
- Shaping the City into something that feels more open and representative
- Make the City a good place to live, not just a place of business

Most Likely to Relate To

- They connect with outdoor festivals, street arts, live music, spoken word events, and co-created exhibitions or performances
- Creative workshops, public art that reflects local identity, and storytelling projects that give voice to underrepresented communities

Location

- They live in close proximity to the Square Mile, often within walking distance or a short bus ride away
- While physically near, they may feel culturally distant from the City's institutions, unless actively welcomed

Life-Stage and Lifestyle

- A mix of young adults, parents and older residents often from migrant or multi-generational households
- Many are renters or long-time residents in social or council housing
- They are engaged in local schools, faith centres, mutual aid groups, or neighbourhood initiatives

Creativity is often informal or collective, through music, cooking, crafts or dance

Likes and Motivations

- ✔ Social connection
- ✔ Celebration and pride in local culture
- ✔ Activities that brings people together
- ✔ Outdoors and informal programming
- ✔ Share meaningful experiences with friends, family and community
- ✔ Support local artists
- ✔ Events that promote belonging and reflect lived experience
- ✔ Experiences that are free, local and grounded in shared values resonate strongly
- ✔ Representation matters; they want to see their cultures, languages and lived experiences reflected in what's on offer

Dislikes and Barriers

- ✖ Venues that feel elitist or overly formal
- ✖ Pre-booking
- ✖ Assumed knowledge
- ✖ Lack of representation
- ✖ Language barriers
- ✖ Feeling unwelcome

Programming

- Local festivals
- Co-created exhibitions
- Community projects
- Music and dance events
- Food festivals
- Outdoor installations
- Informal and accessible programming
- Programming that centres diaspora communities

Place and Time

- They engage most during weekends, evenings and school holidays
- Locations that are close to home

Price

- Free or low cost
- Travel costs should be considered
- Pay what you can models work well
- Free refreshments resonate well



They see culture as something that happens with people they know, in places they trust. They're drawn to activity that's vibrant, inclusive and connected to real community life, whether it's music in the park, a co-created exhibition, or a food-based celebration

Communications

- They respond to localised, relationship-driven communication
- Flyers in community centres, WhatsApp groups, school networks, local Facebook pages, or posters in shops are effective
- Word of mouth via trusted local figures can also be very effective
- Communications should be visual, multilingual where relevant, and focused on the community benefits of attending

Community

- Community is central to this group's cultural identity
- They are active in neighbourhoods and often attend events in groups; family, friends, school peers
- Events that are rooted in their community's rhythms, religious calendars, school timetables, or cultural celebrations, tend to succeed best

Co-creation

- They are highly open to co-creation when invited early and respectfully
- They're not looking to be consulted as an afterthought, they want to be involved in making decisions, shaping content and sharing their own knowledge

Perceptions of the City

- Good Neighbours may view the City as impressive but distant, more about business and finance than community or culture
- Their impression shifts when they see people like themselves reflected in the programme, staff or branding

What they do in the City

- They attend outdoor events such as community led festival days
- They may take part in local collaborative arts projects linked to neighbourhood schools or organisations

Potential Barriers

- Perceive City facilities as not for them
- High ticket prices
- Overly formal atmosphere
- Offers look boring/ irrelevant
- If an event lacks clear community links or feels tokenistic, they will likely disengage

Brand Messaging

Should emphasise:

- Community
- Low cost
- Cultural elements
- Family friendliness

Avoid:

- Tokenism
- Jargonistic language

Resonant phrases:

> Celebrate culture

> Tell us your story

> Join your neighbours