

East London

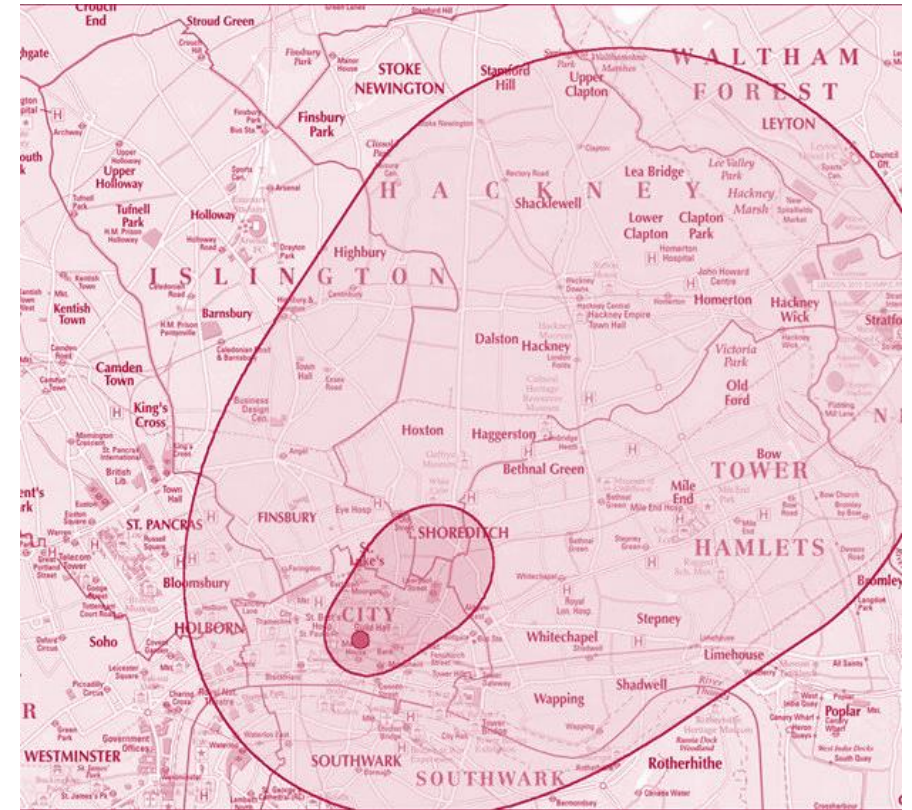
Place Based Insights

Oliver Mantell, Director of Evidence & Insight

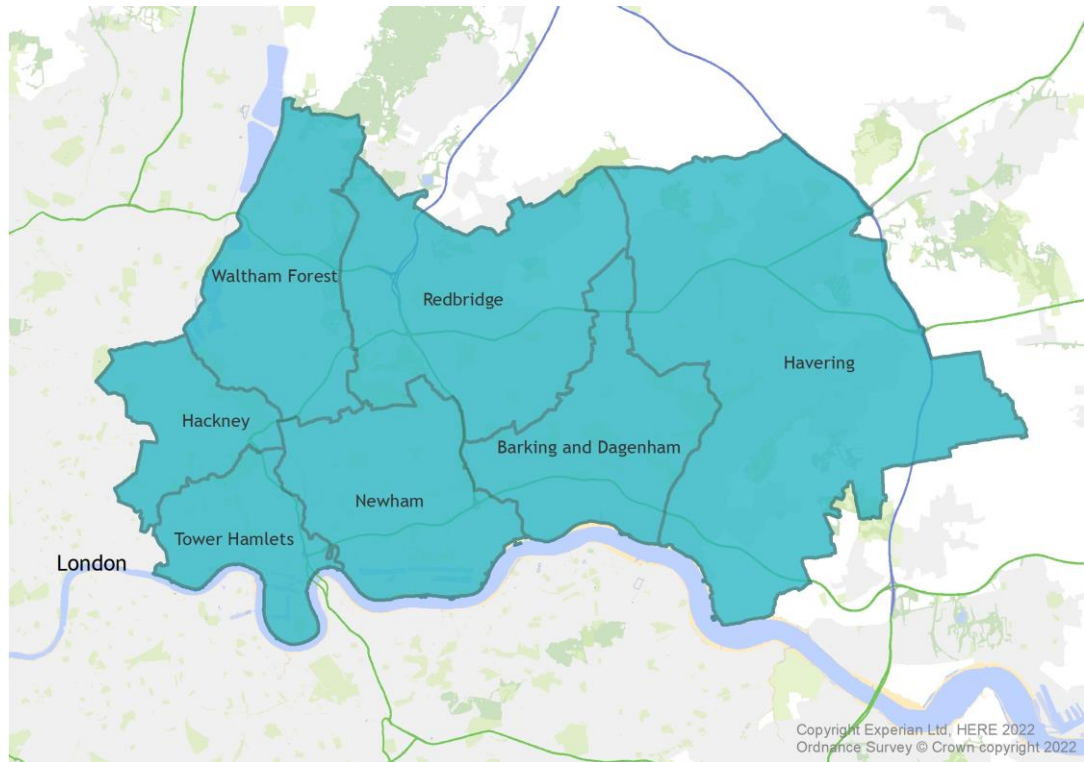
Elise Boileau, Evidence & Insight Researcher

Format of the session

- About the local area and population
- About local audiences
- Discussion re findings and own knowledge
- Summary and implications



Levels of Information



UK

- Cultural Population Monitor

London

- Cultural Population Monitor / Audience Spectrum / Audience Finder

Borough

- Audience Spectrum / Audience Finder (ticketing & survey) / Census / TGI

Ward

- Audience Spectrum / Audience Finder (ticketing) / APR+

 audience
spectrum

Population
segmentation using
multiple data sources
based specifically on
arts and cultural
interests



Data Sources

5 key data sources



Taking Part - National depth survey

Cultural Proximity - Convenience of offer

Experian Data Universe - wider consumer data

Population/Census - core demographics

Behavioural data: survey and ticketing



Example: Experience-Seekers Pen Portrait

Download

Experience Seekers statistical appendix

Engagement rank: 3

Population: 8% of English households

Arts attenders: tbc

Rating: Higher



Highly active, diverse, social and ambitious, engaging with arts on a regular basis

- Make up an important and significant part of urban arts audiences
- This group are highly active, diverse, social and ambitious singles and couples, regularly engaging with the arts on a regular basis
- Often students, recent graduates and in the early to mid-stages of their careers
- Tend to live close to city centres, so have easy access to and attend art galleries and heritage sites
- Interests cover mainstream, contemporary and culturally diverse activities, and are active in their social lives
- They are mostly in search of new things to do and have disposable income for leisure activities like sports/arts memberships, visits to cafes, bars and restaurants
- Typically digitally savvy, they will share experiences through social media

- Overview

Lifestage & location

A high proportion are singles and couples in their 20s and 30s across the country but 56% focused in the South.

Opportunity

Seeking new experiences to support and drive their lifestyle. Interested in both mainstream and alternative offers. Mostly digital natives who like to 'share' and follow recommendations. They are likely to be influencers and are likely to form key influencers amongst their peers.

+ Interests

+ Location

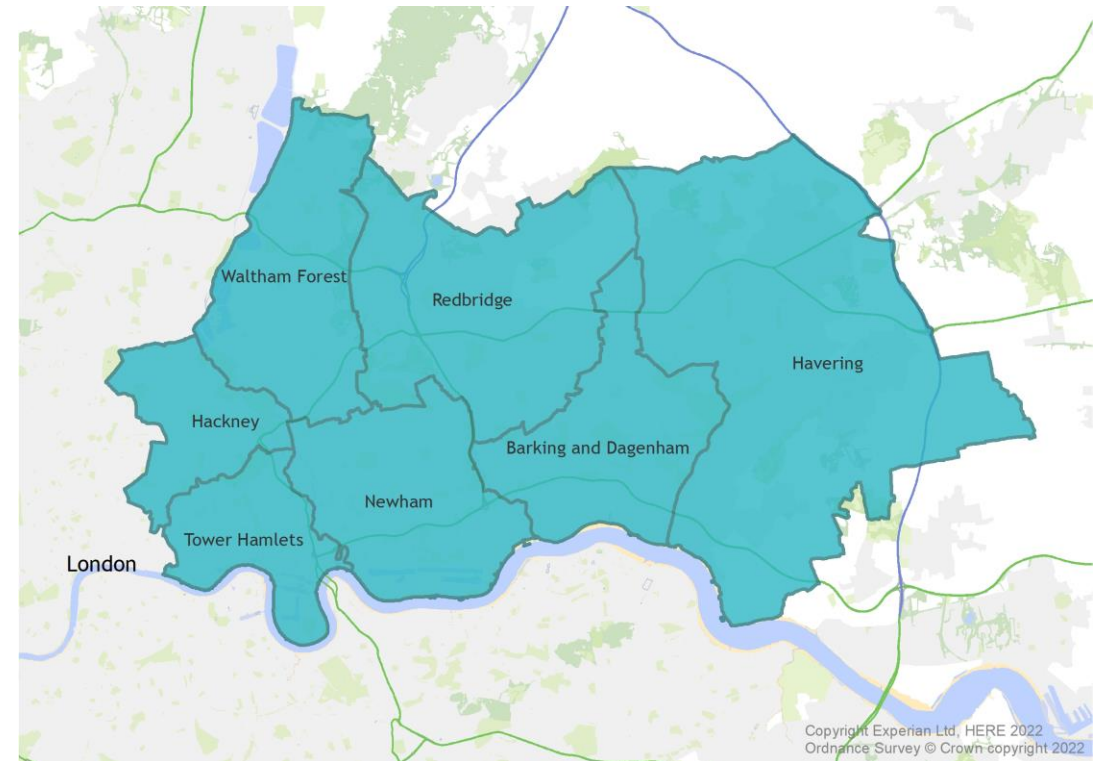
+ Preferences

+ How to engage

Local Population

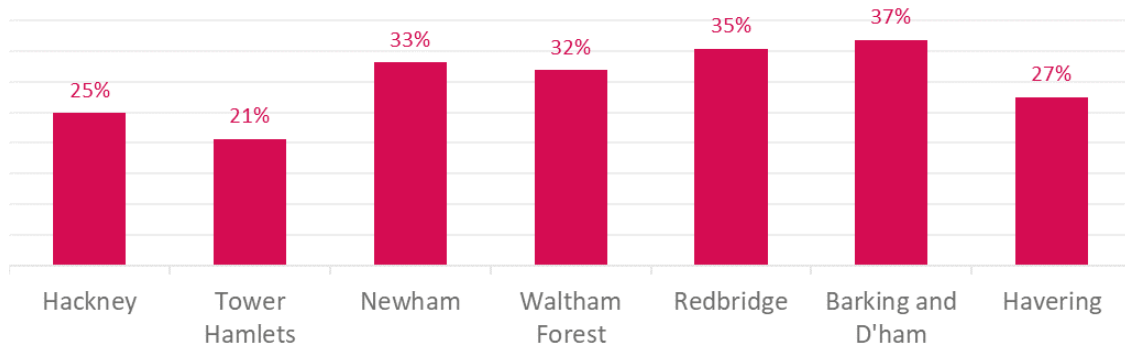
Local Area and Population

- Overview of demographics
- Audience Spectrum, inc. maps:
 - Largest segment
 - Each of the three largest segments
- Top Lines from Cultural Participation Monitor

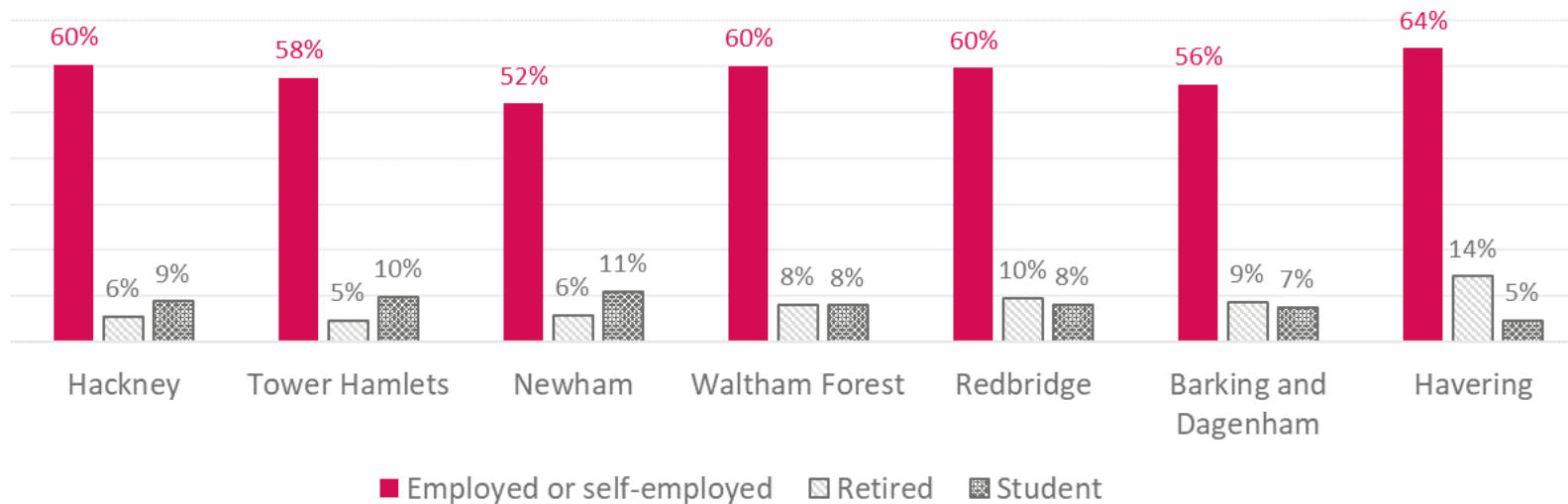
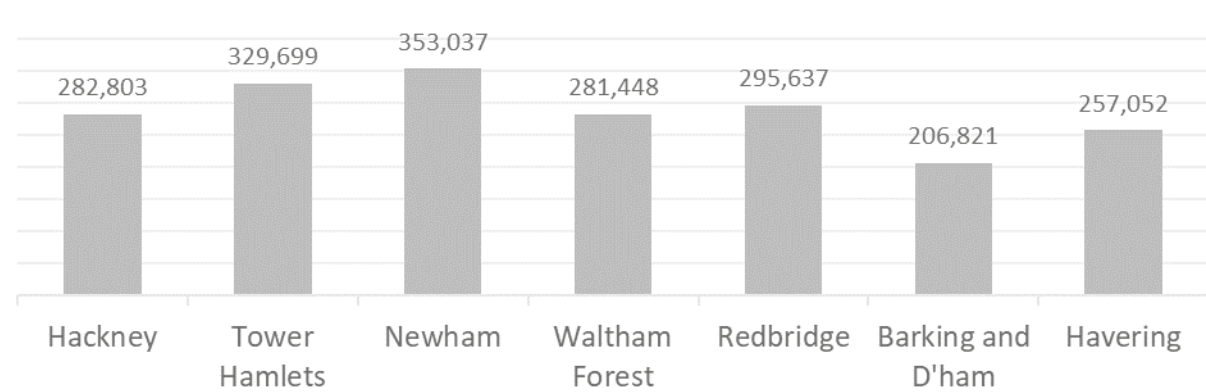


Population data – comparing the local areas

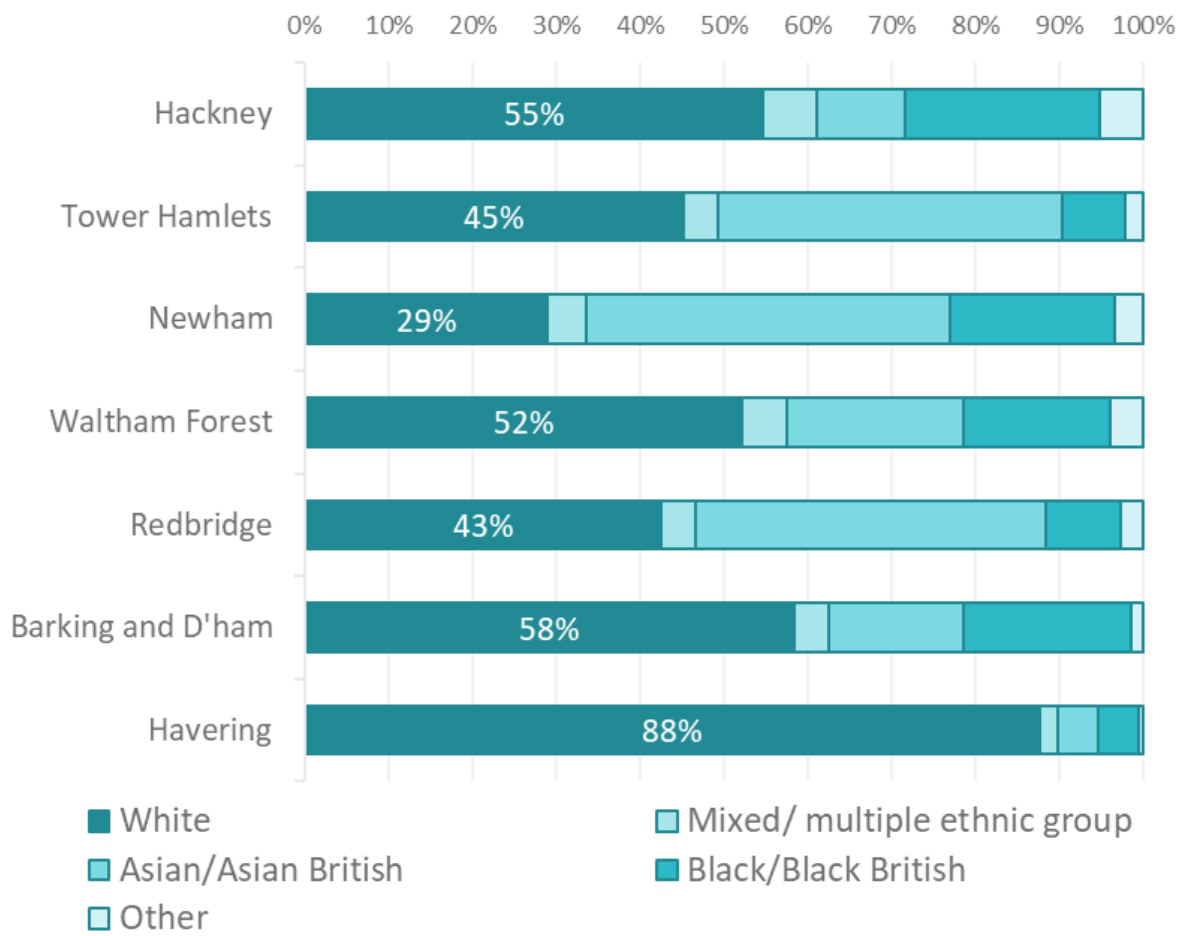
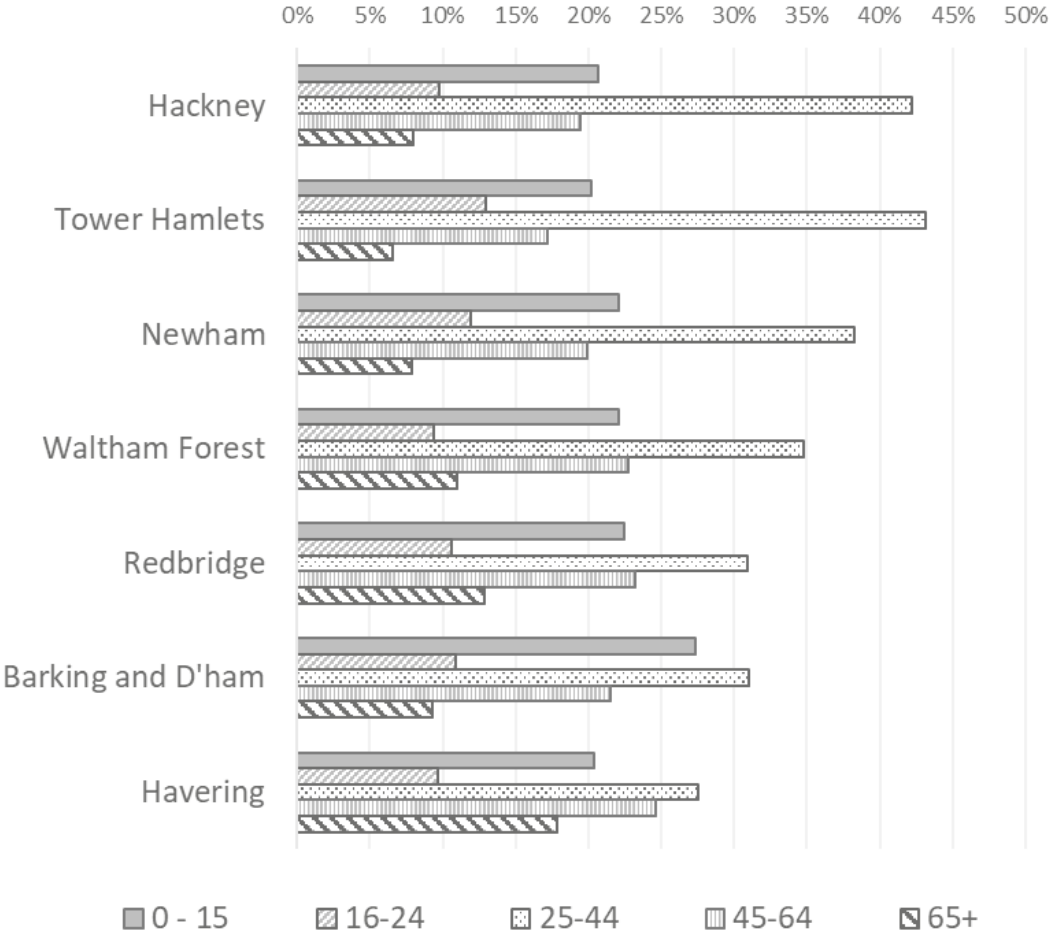
Any dependent children in household



Population estimate 2020

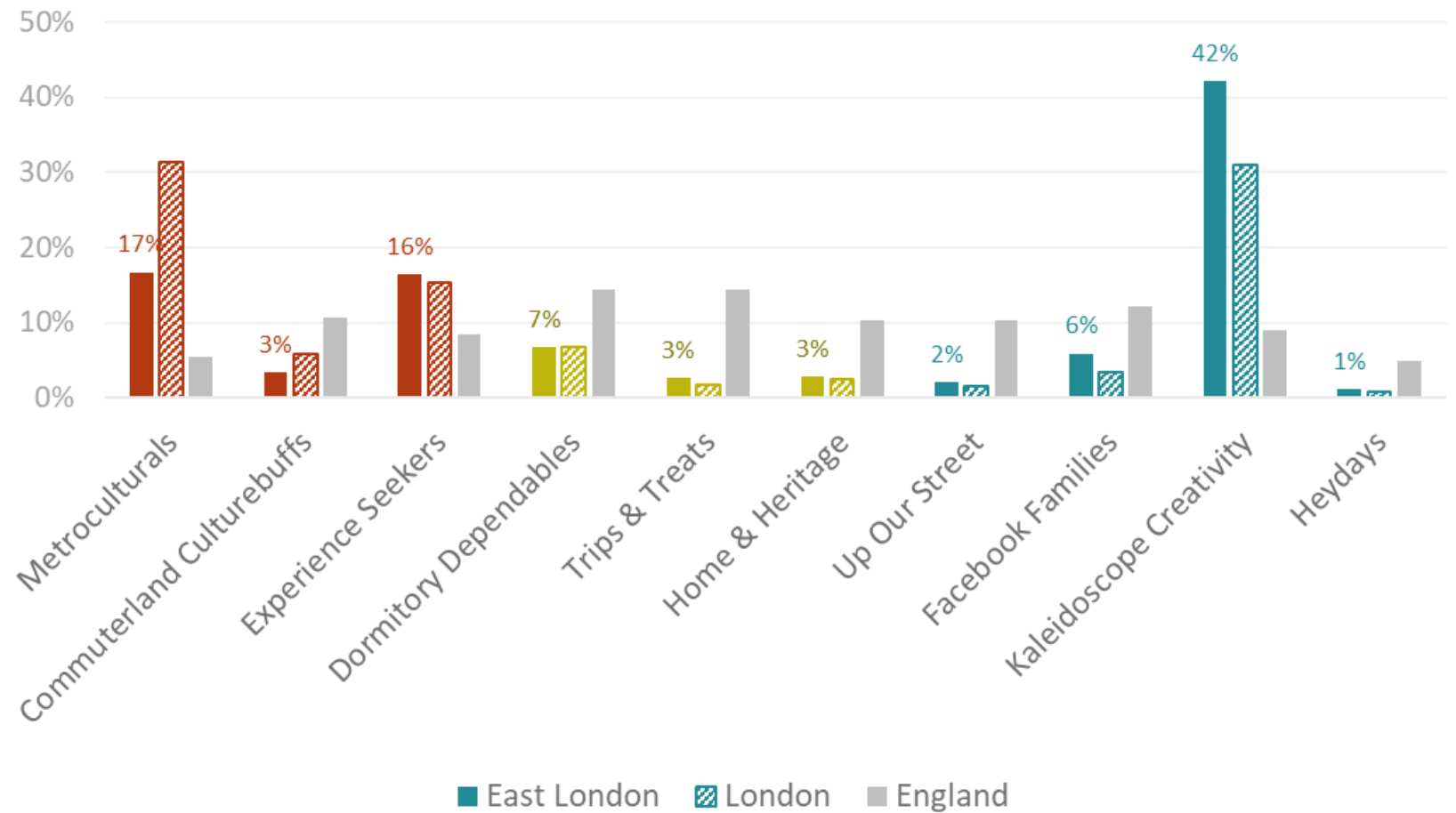


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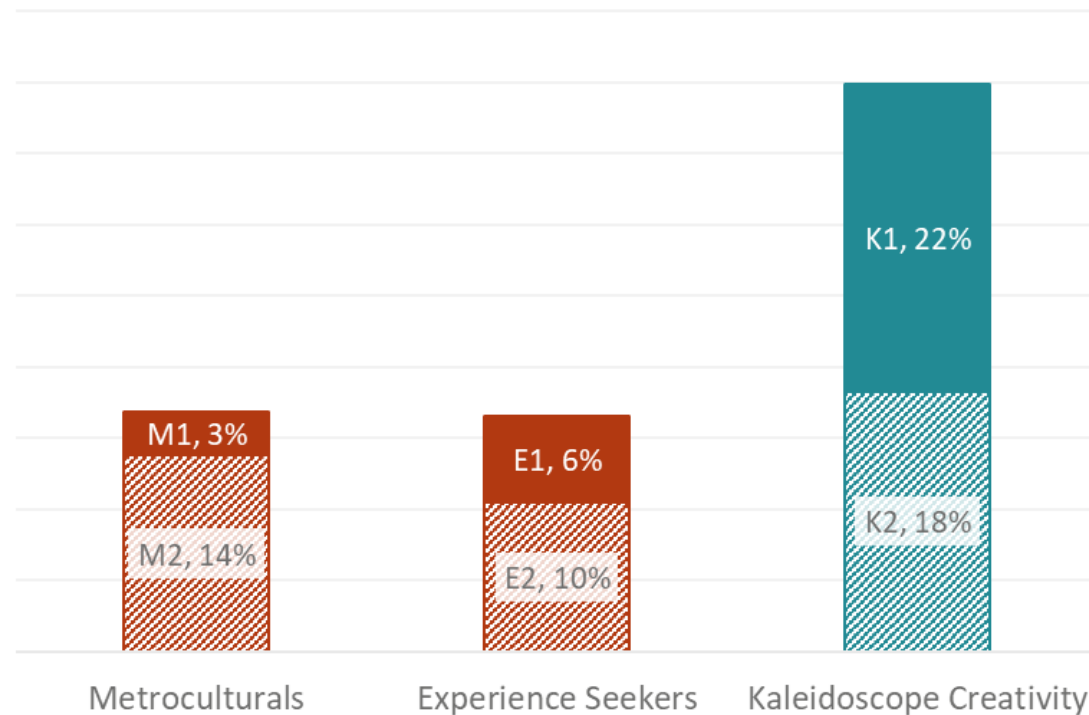
Overall Population Audience Spectrum Profile

Kaleidoscope Creativity, Metroculturals, and Experience Seekers make up 75% of the population



Overall Audience Spectrum Profile: Enhanced

Top 3 Audience Spectrum Segments - Enhanced



M1: Older, established and high-spending professional elites.

M2: Younger, mobile and emerging metropolitan professionals.

E1: Socially minded mid-life professionals with varied artistic tastes.

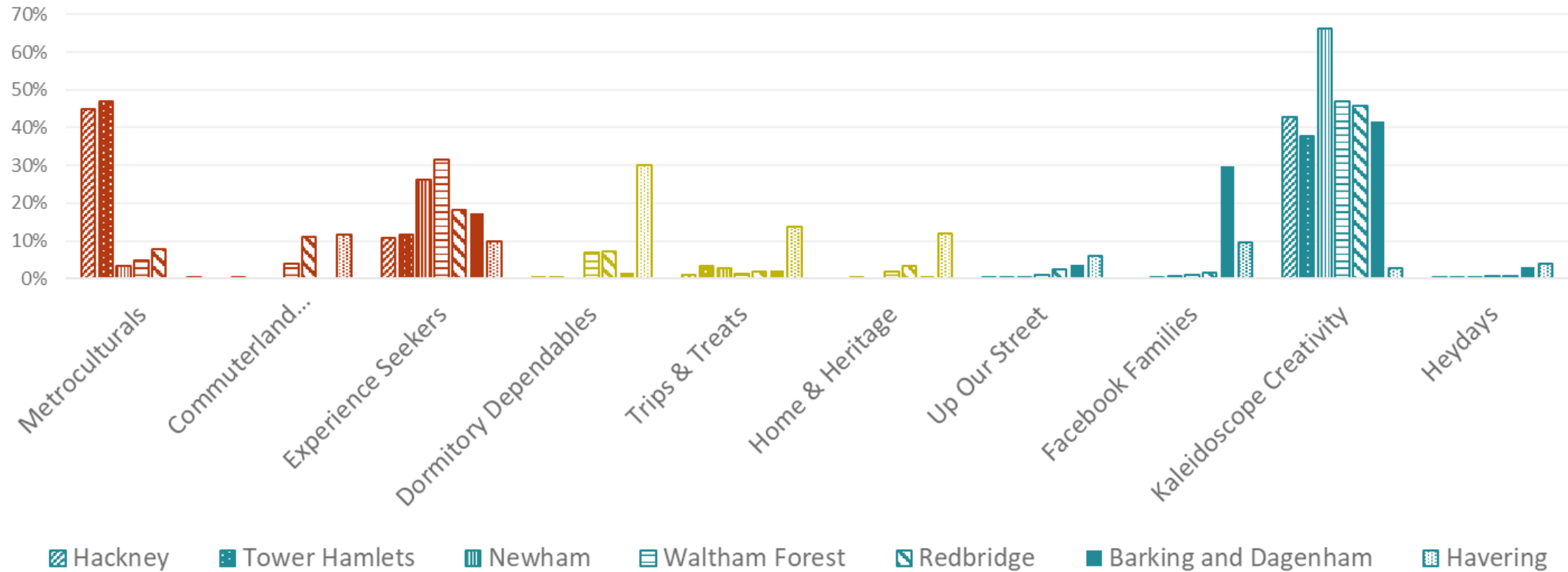
E2: Students and graduates with adventurous attitudes in diverse urban areas.

K1: Settled and diverse urban communities

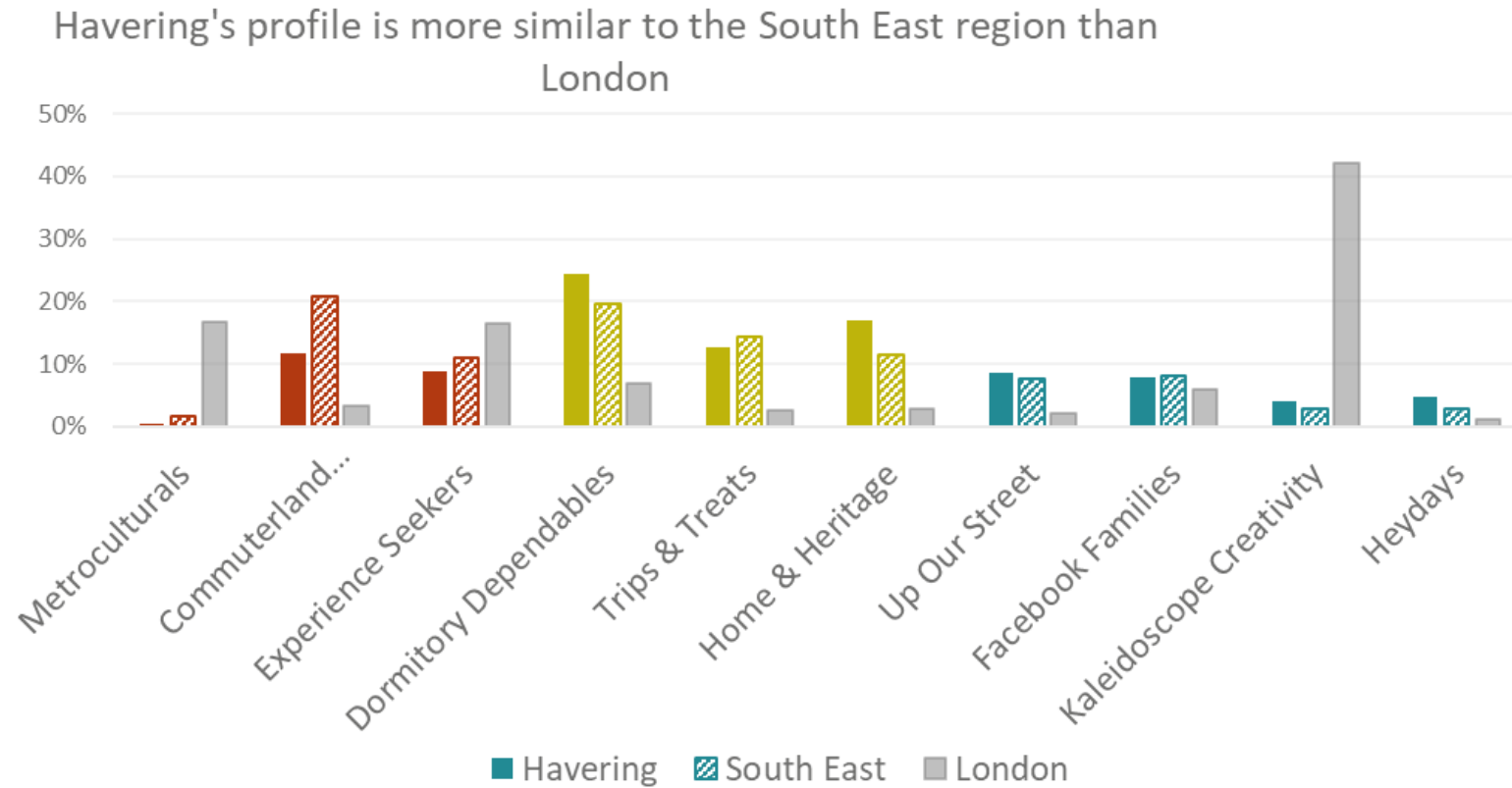
K2: Hard-pressed singles in city tower blocks

Audience Spectrum Profile by Local Area

Metroculturals are in the central boroughs, Barking and Dagenham has more Facebook Families, Watham Forest and Newham have the most Experience Seekers

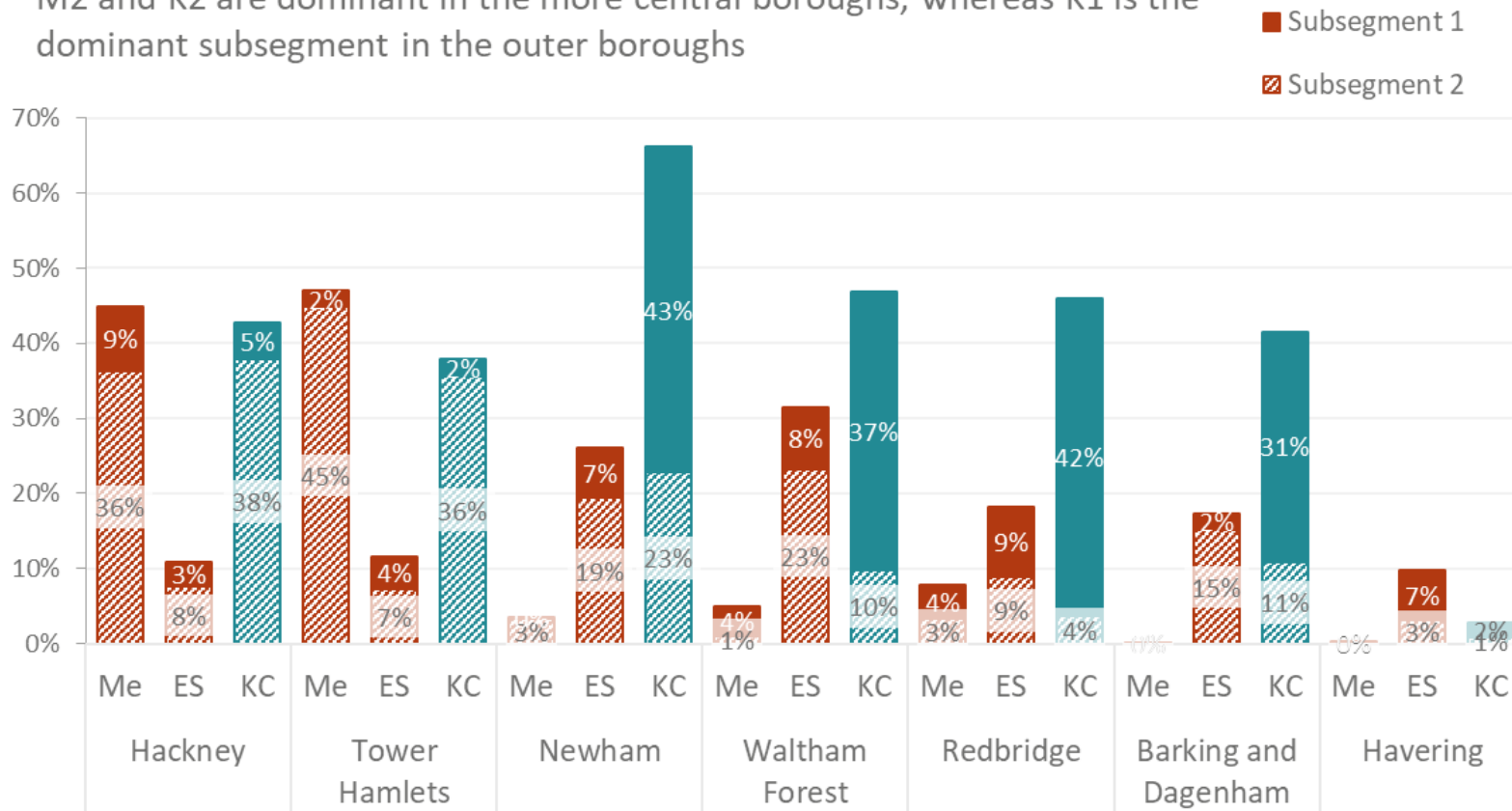


Audience Spectrum Profile by Local Area



Audience Spectrum Profile by Local Area – Top Segments Enhanced

M2 and K2 are dominant in the more central boroughs, whereas K1 is the dominant subsegment in the outer boroughs



M1: Older, established and high-spending professional elites.

M2: Younger, mobile and emerging metropolitan professionals.

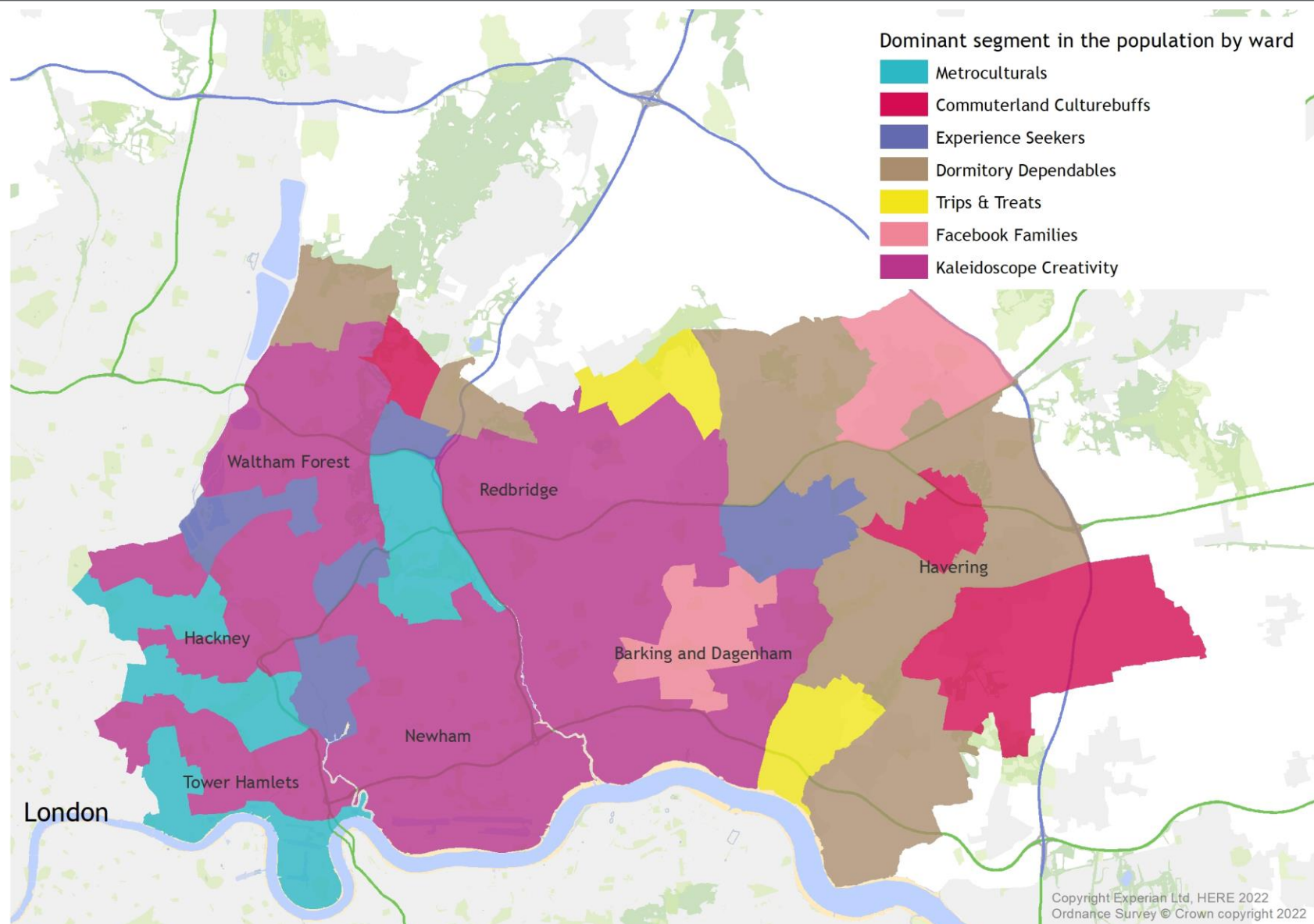
E1: Socially minded mid-life professionals with varied artistic tastes.

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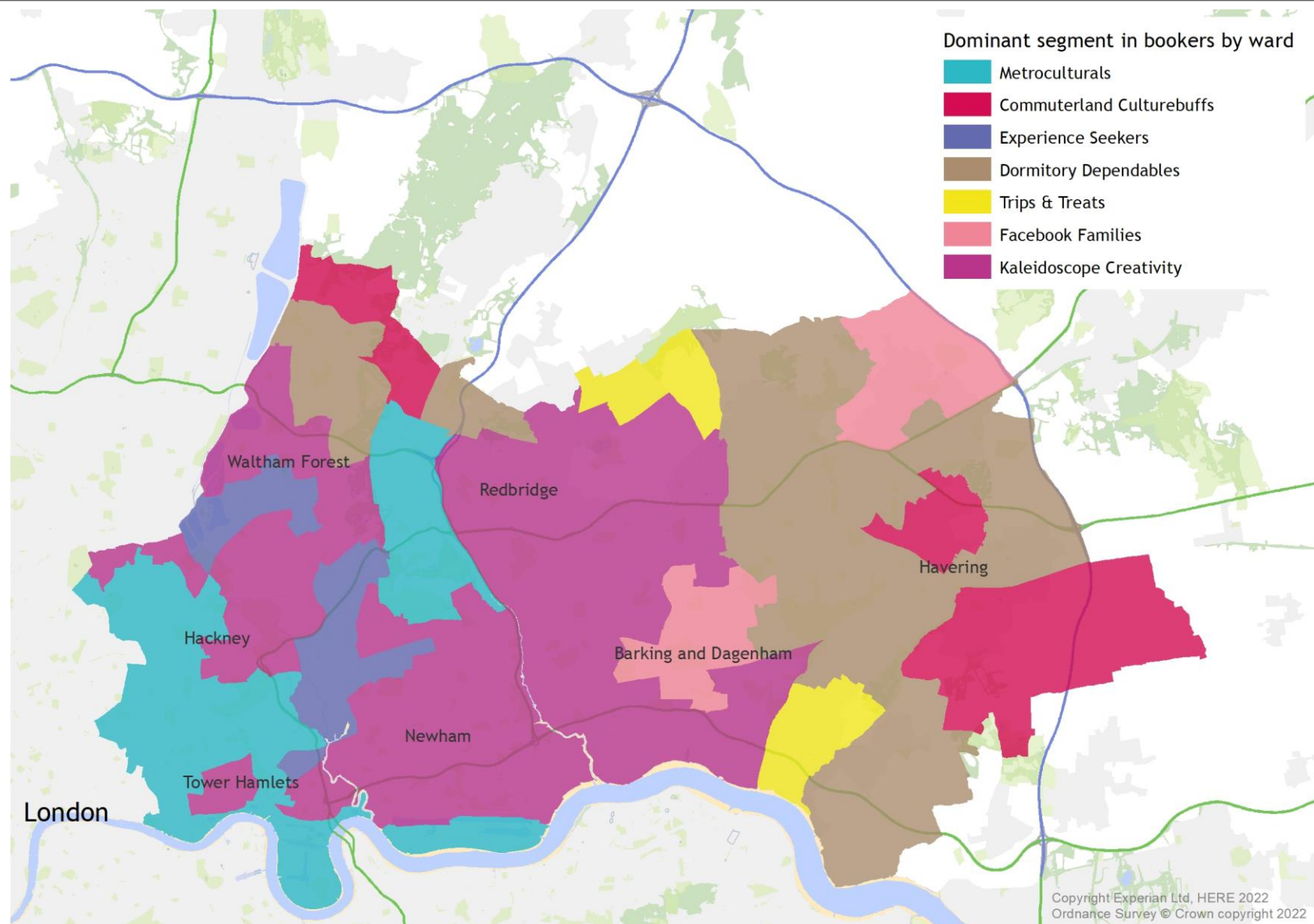
K1: Settled and diverse urban communities

K2: Hard-pressed singles in city tower blocks

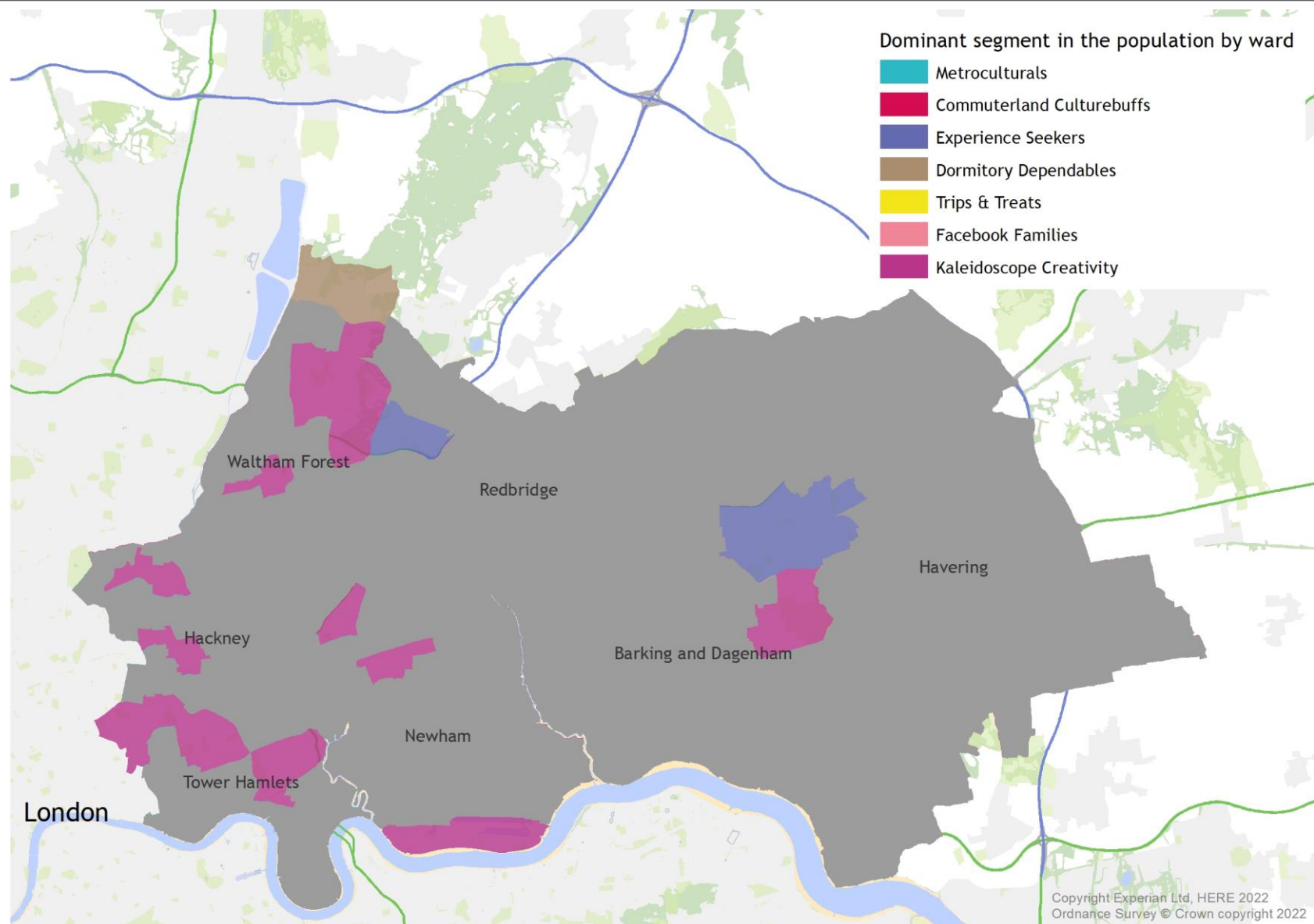
Dominant Audience Spectrum Segment by Ward - Population



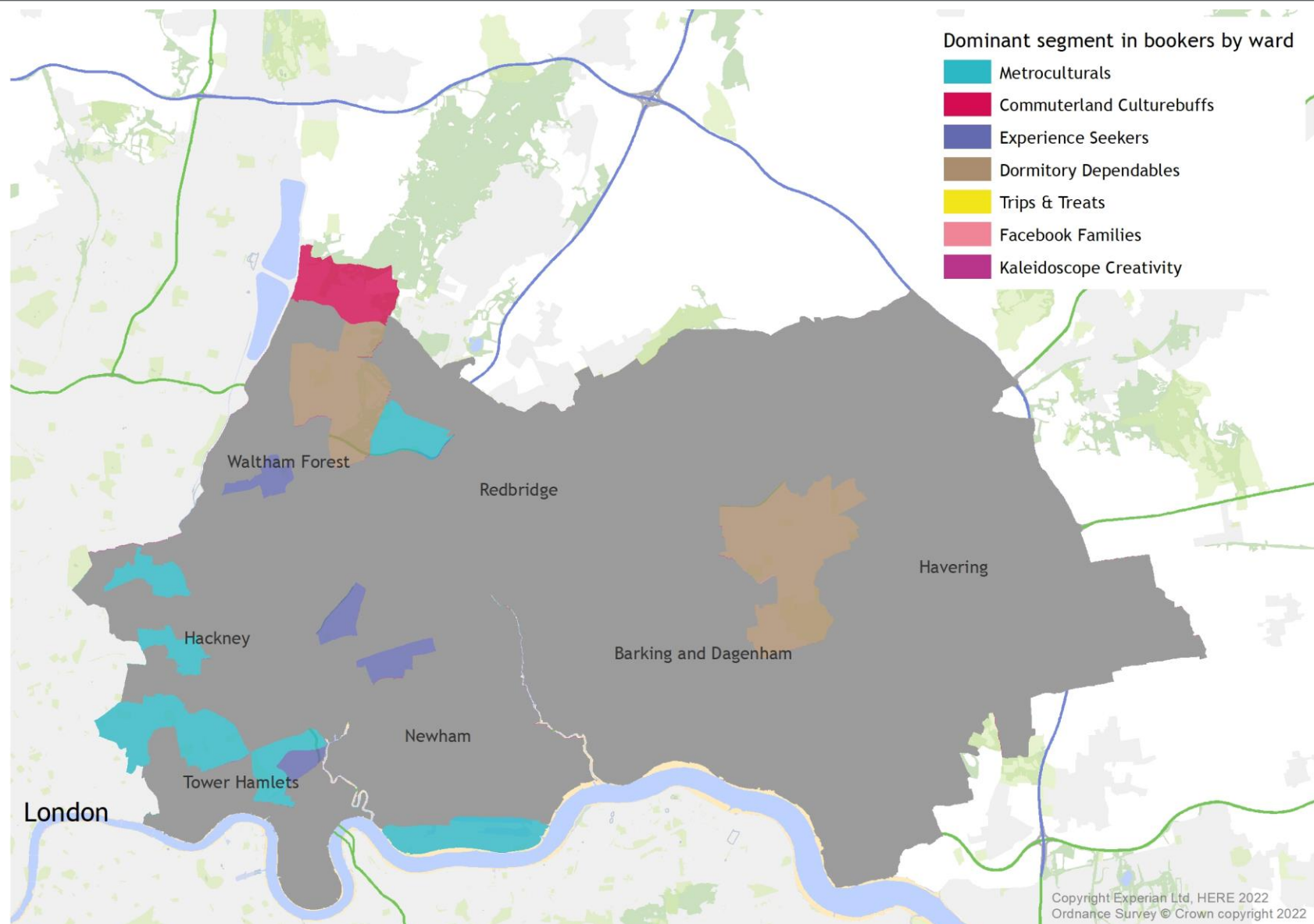
Dominant Audience Spectrum Segment by Ward - Bookers



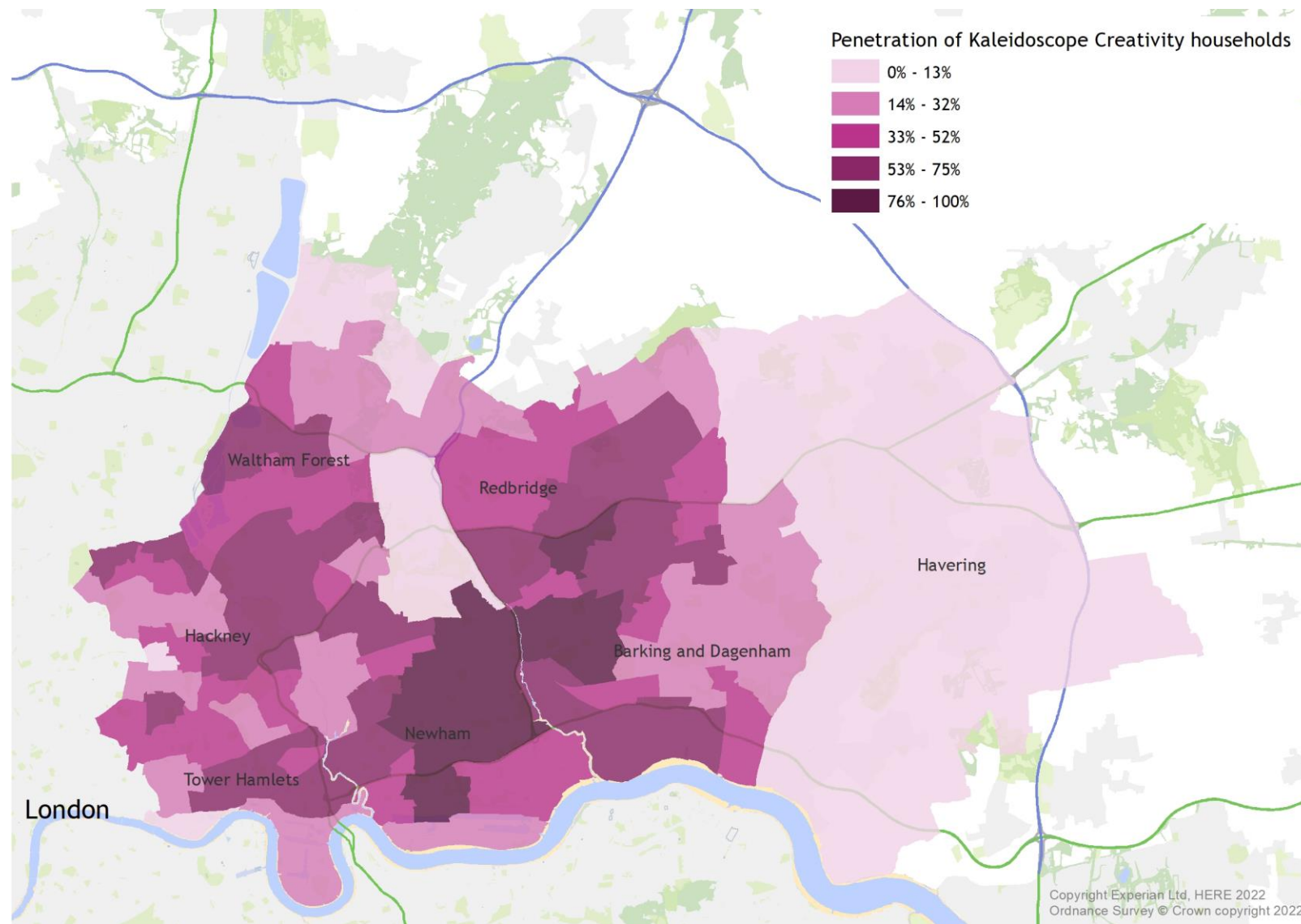
Dominant Audience Spectrum Segment by Ward - Population



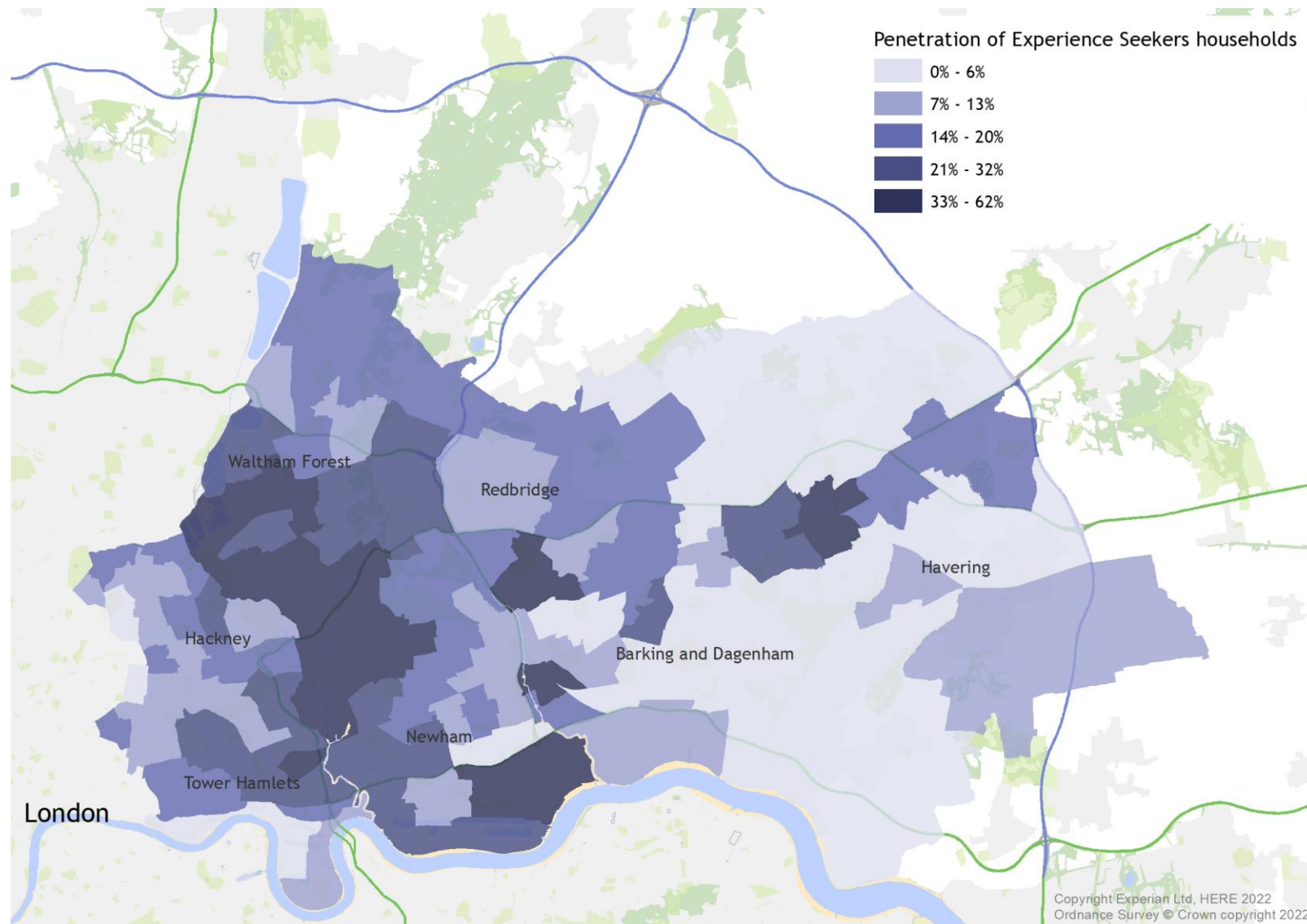
Dominant Audience Spectrum Segment by Ward - Bookers



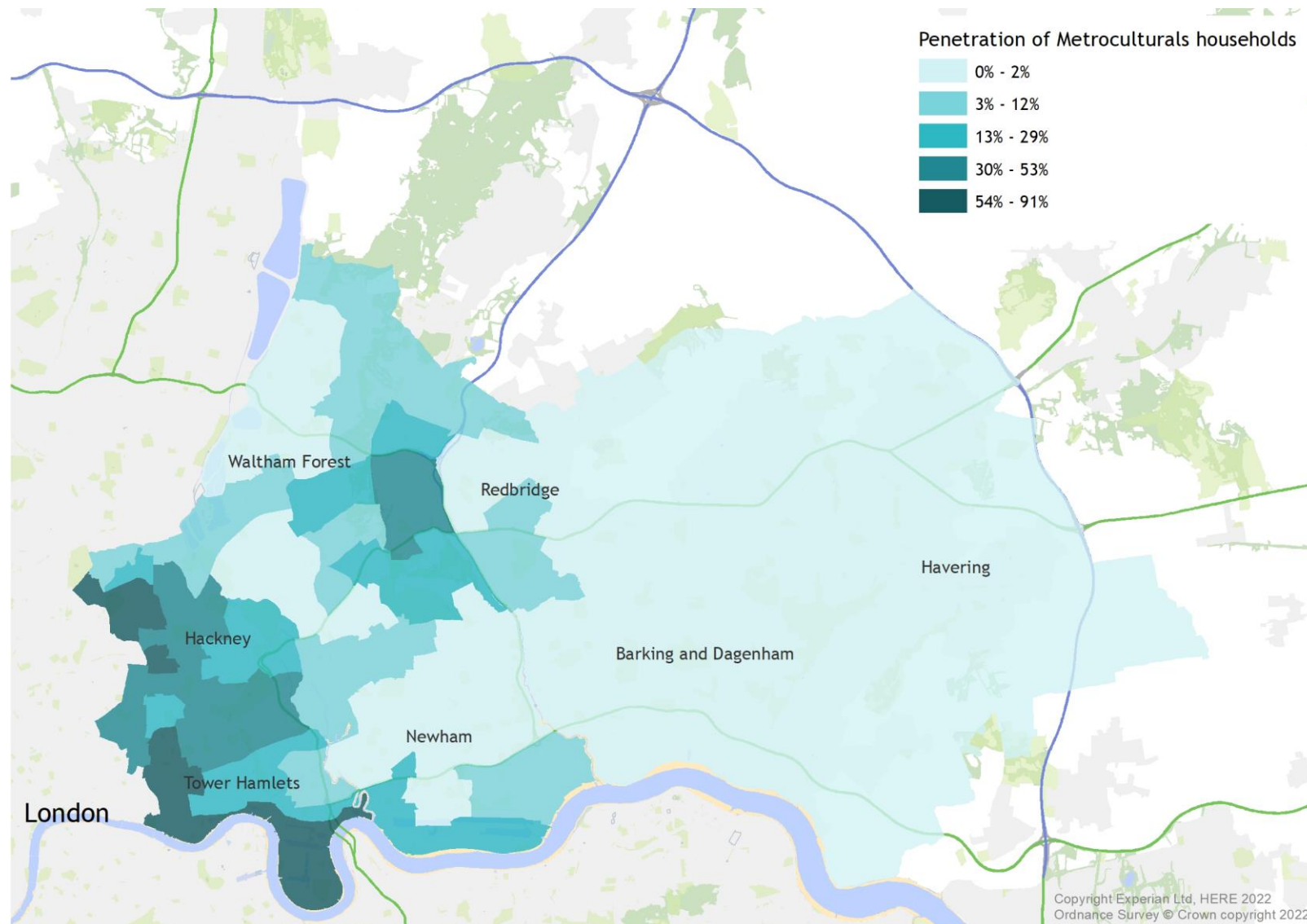
Penetration of Audience Spectrum Population by Ward



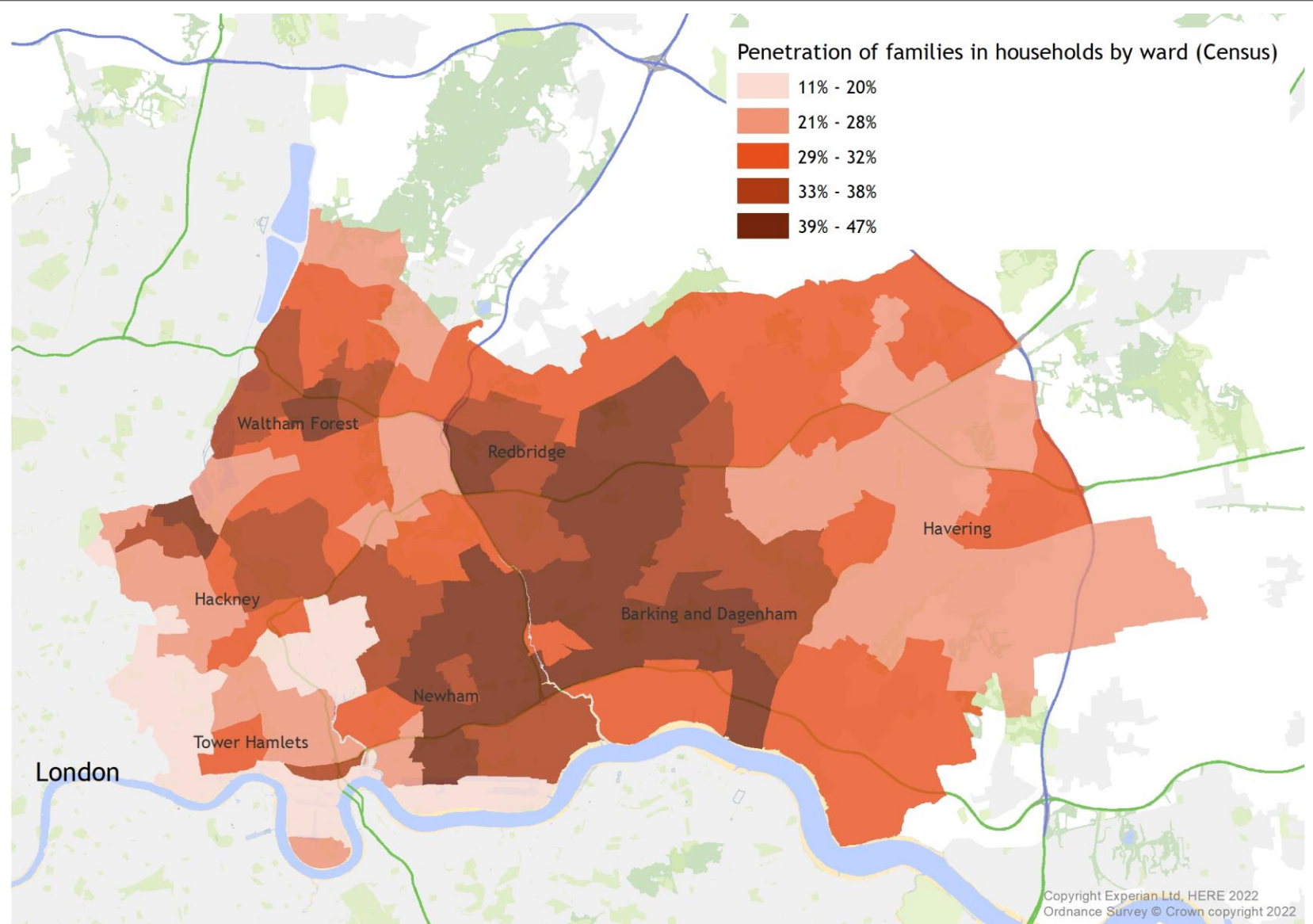
Penetration of Audience Spectrum Population by Ward



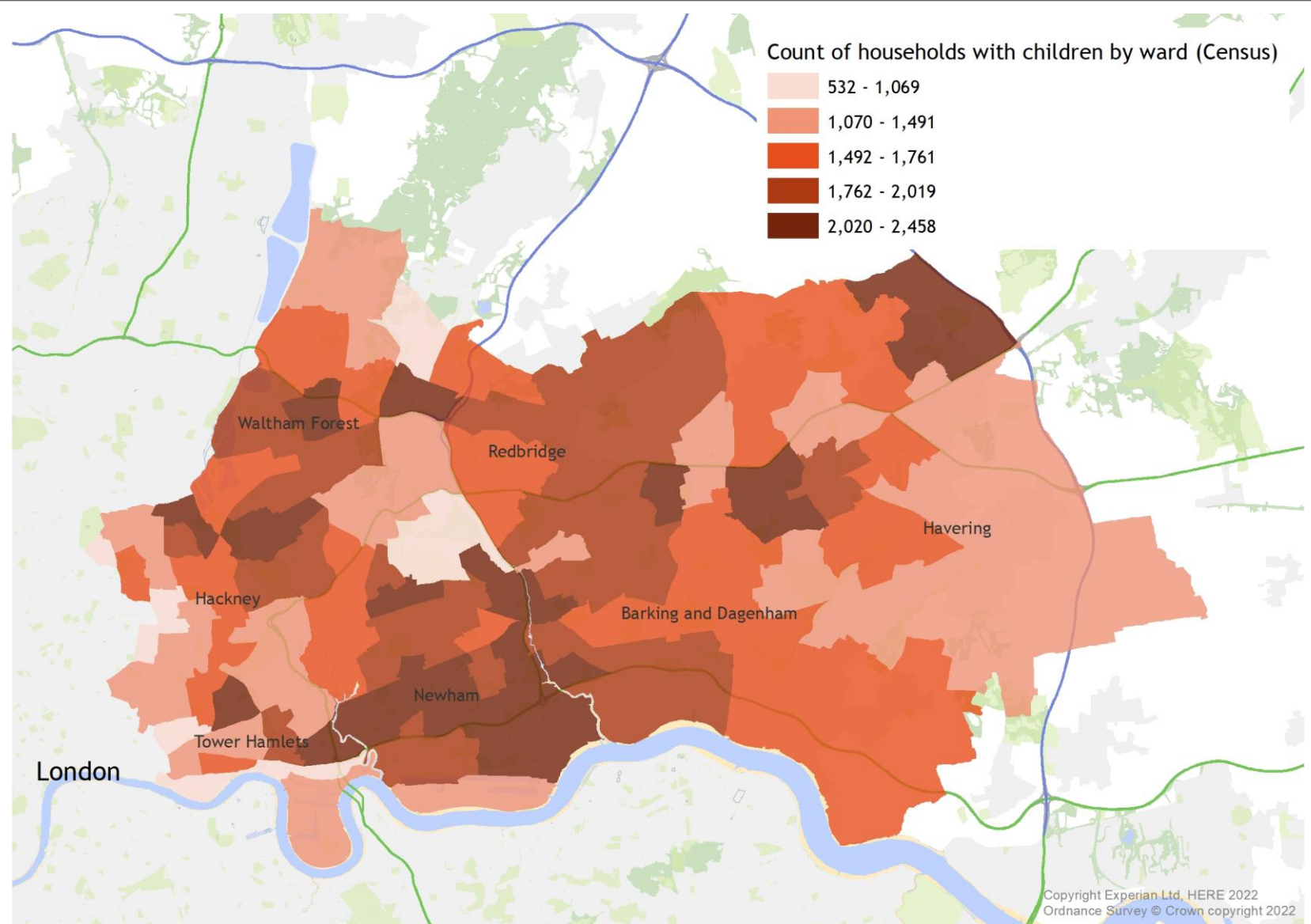
Penetration of Audience Spectrum Population by Ward



Families by Ward - %



Families by Ward - Count



Local Audiences

Sales and Profile

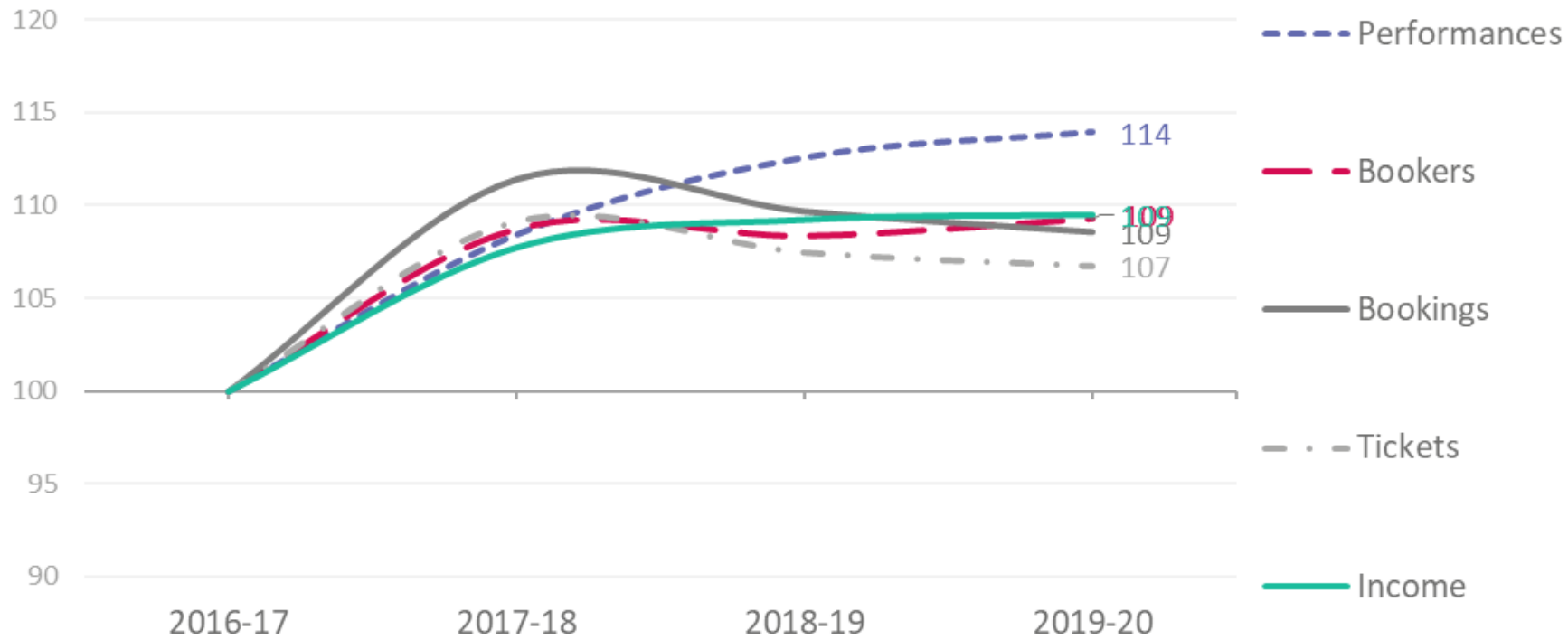
About Local Audiences

Audience Finder ticketing:

	16/17	19/20	Increase
Bookers	147k	161k	6k
Bookings	366k	397k	31k
Tickets	841k	898k	57k
Income	£17.2M	£18.8M	£1.6M

Sales Trends

Sales trend - index



Based on local residents across a consistent cohort of Audience Finder venues.

2019/20:

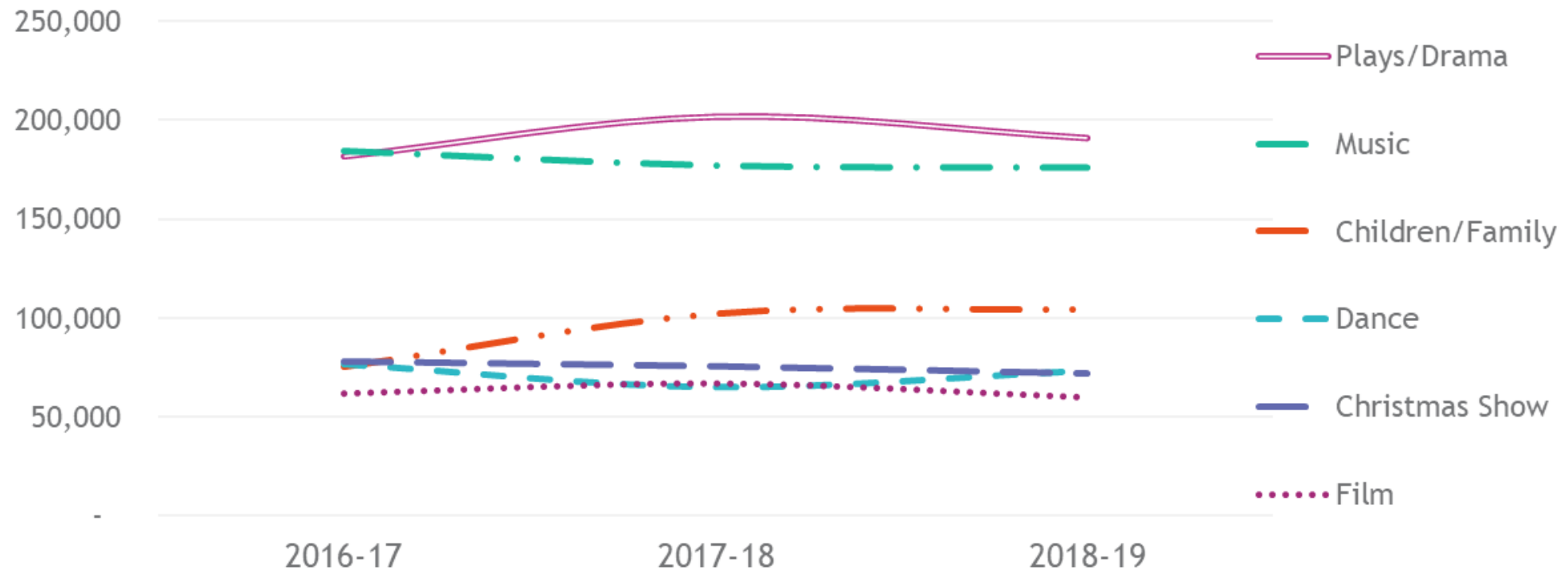
Avg. income/ticket: £22.16, +6%

Avg. bookings/booker: 2.5, -0%

Avg. tickets/booking: 2.3, -2%

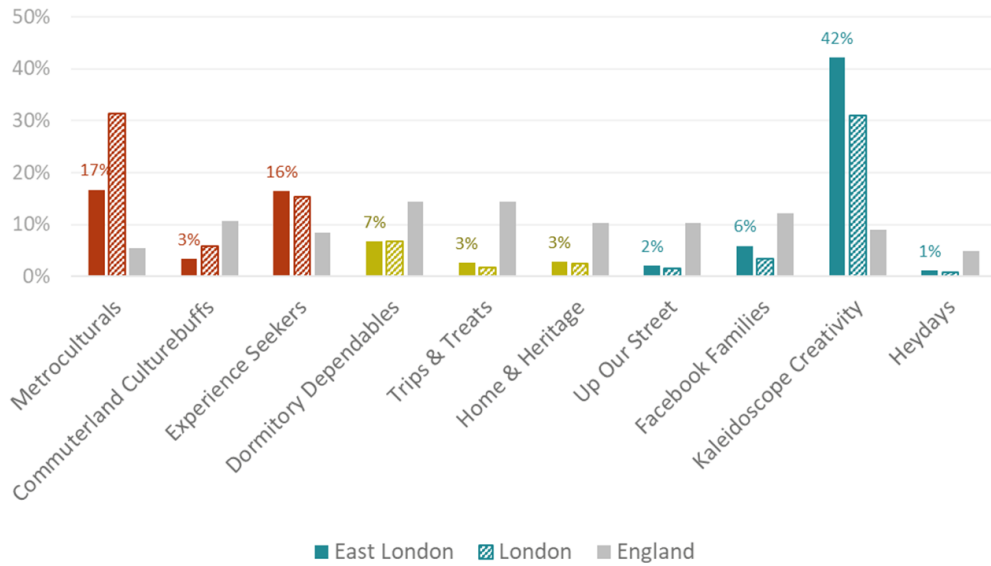
Audience Trends

Ticket sales by year for six most popular artforms

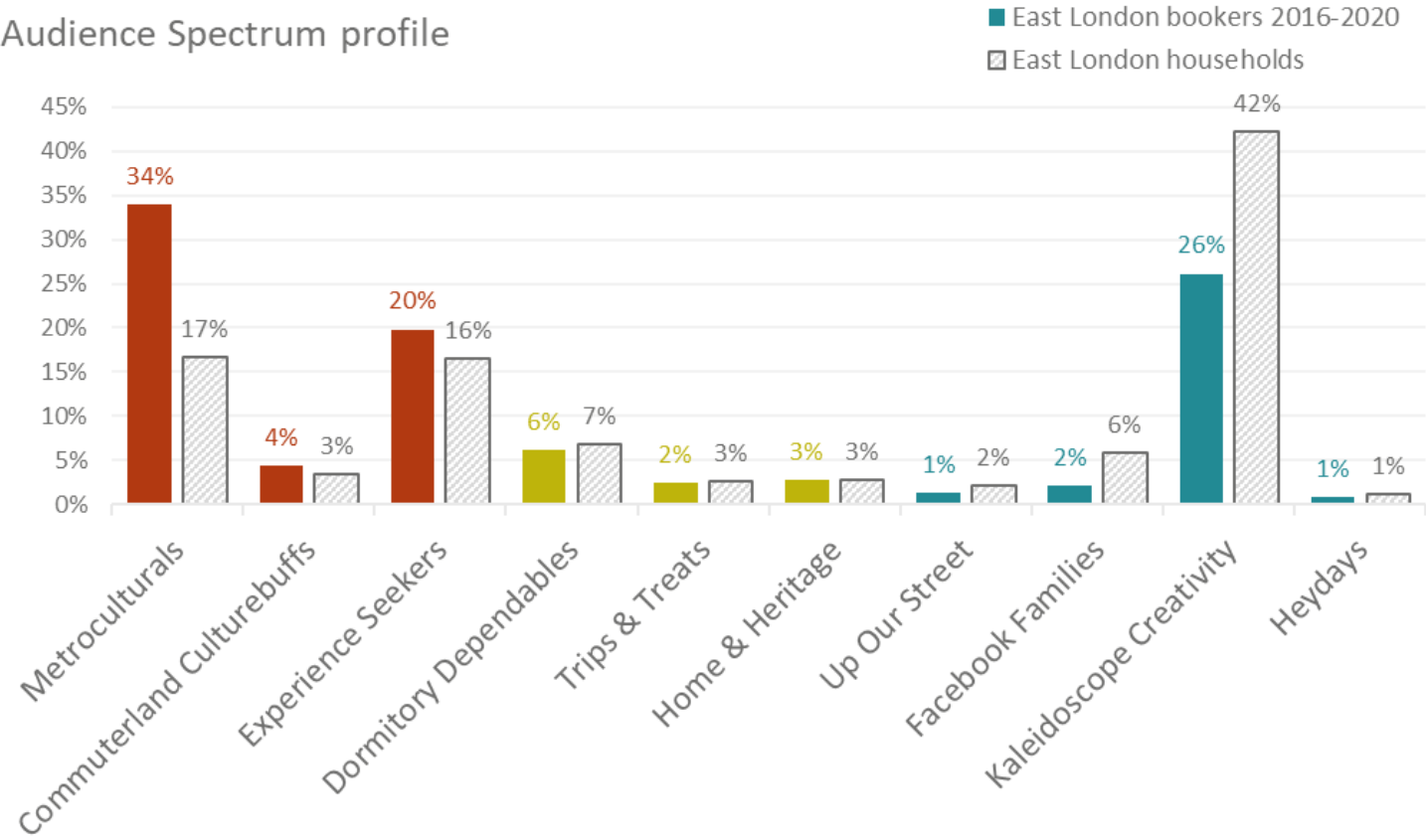


About Local Audiences

Kaleidoscope Creativity, Metroculturals, and Experience Seekers make up 75% of the population



Audience Spectrum profile



Audience Trends

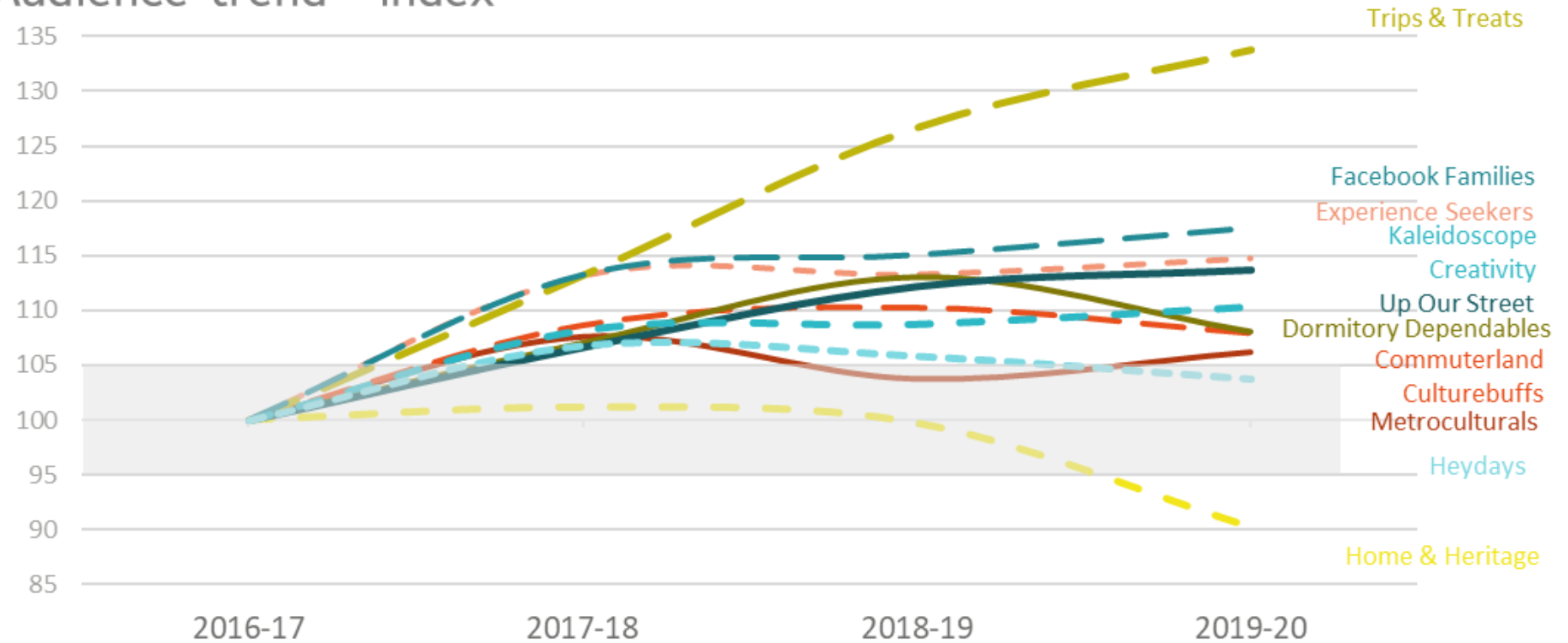
(Lower Income) Families



Older / Higher-engaged



Audience trend - index

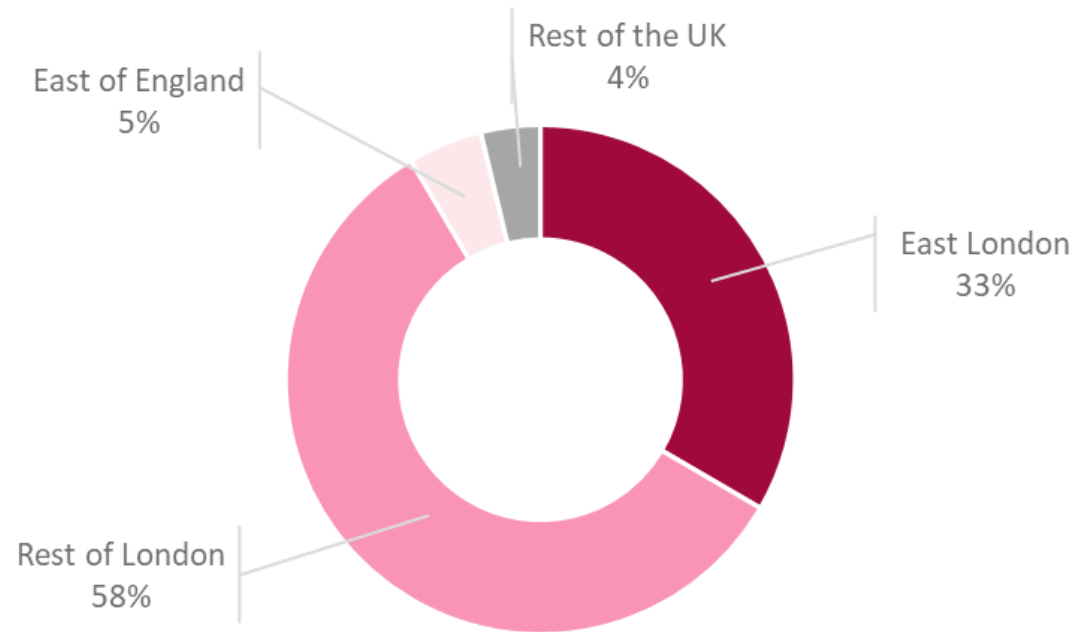


Local Audiences

Geography

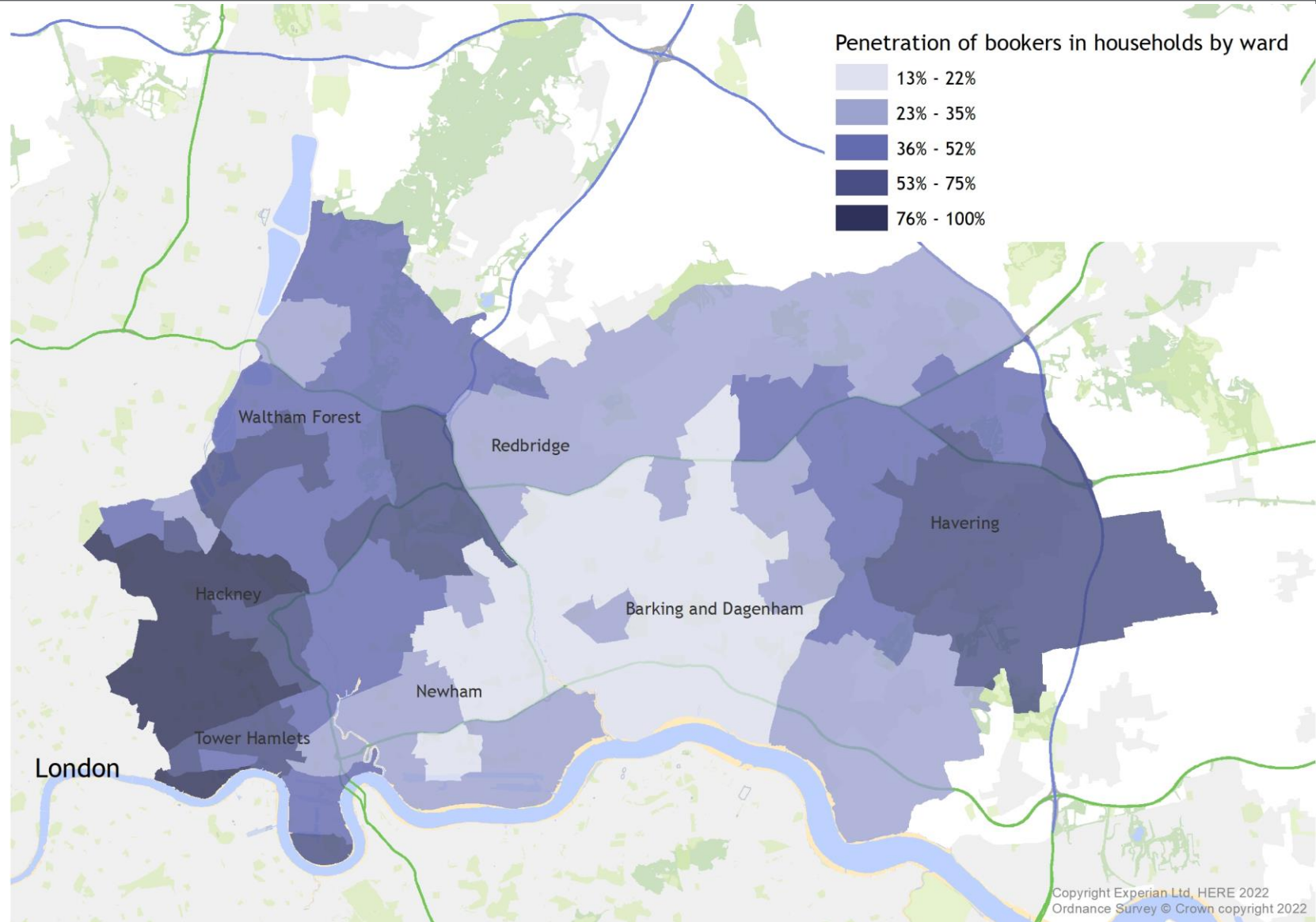
Non-Local Audiences

A **third** of all tickets were to East London organisations,
91% of all tickets were to organisations in London
Tickets issued to East London residents, in years 2016-17 to 2019-20

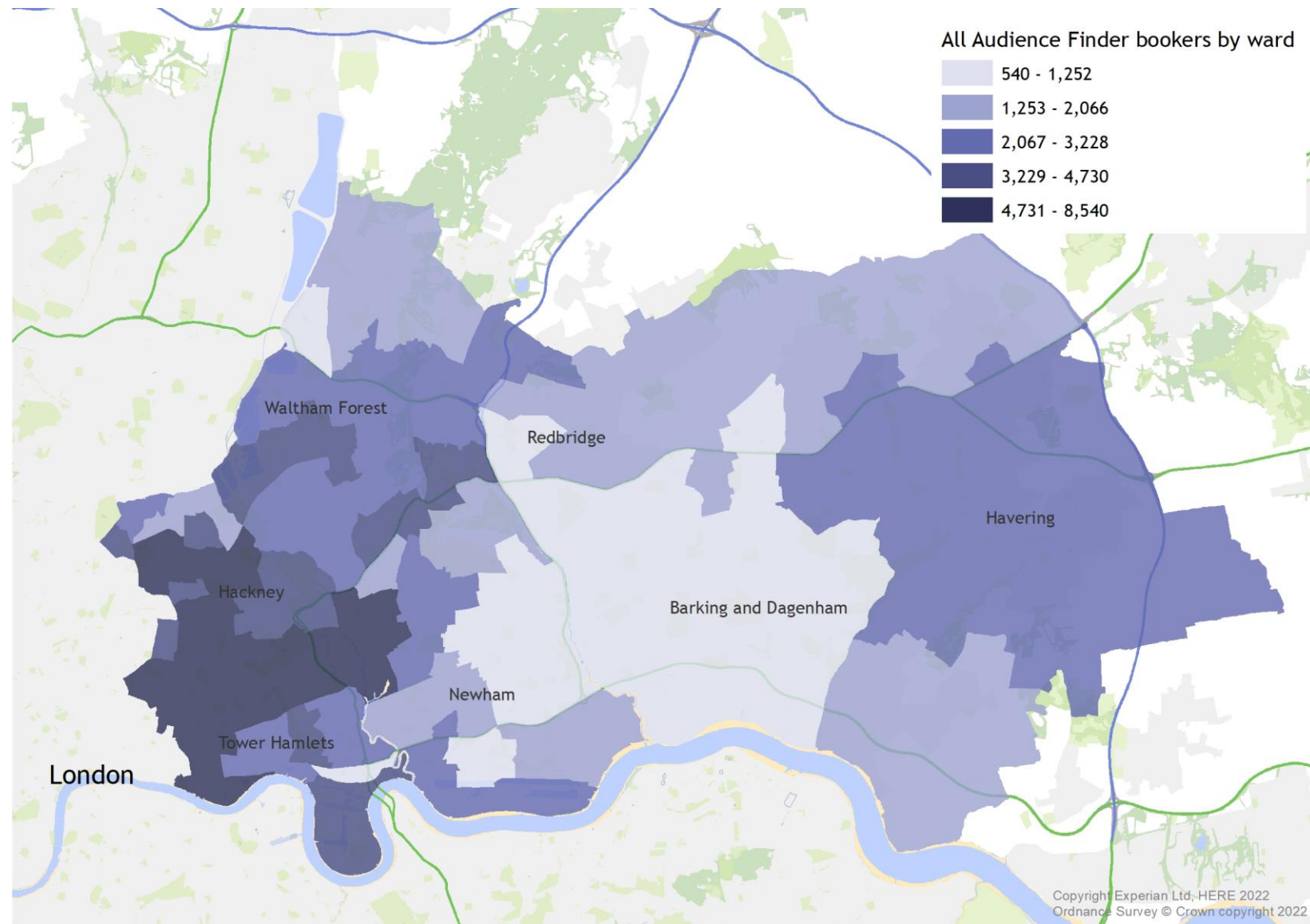


Audience Finder Surveys: **41%** of survey respondents from the local area were visiting organisations locally

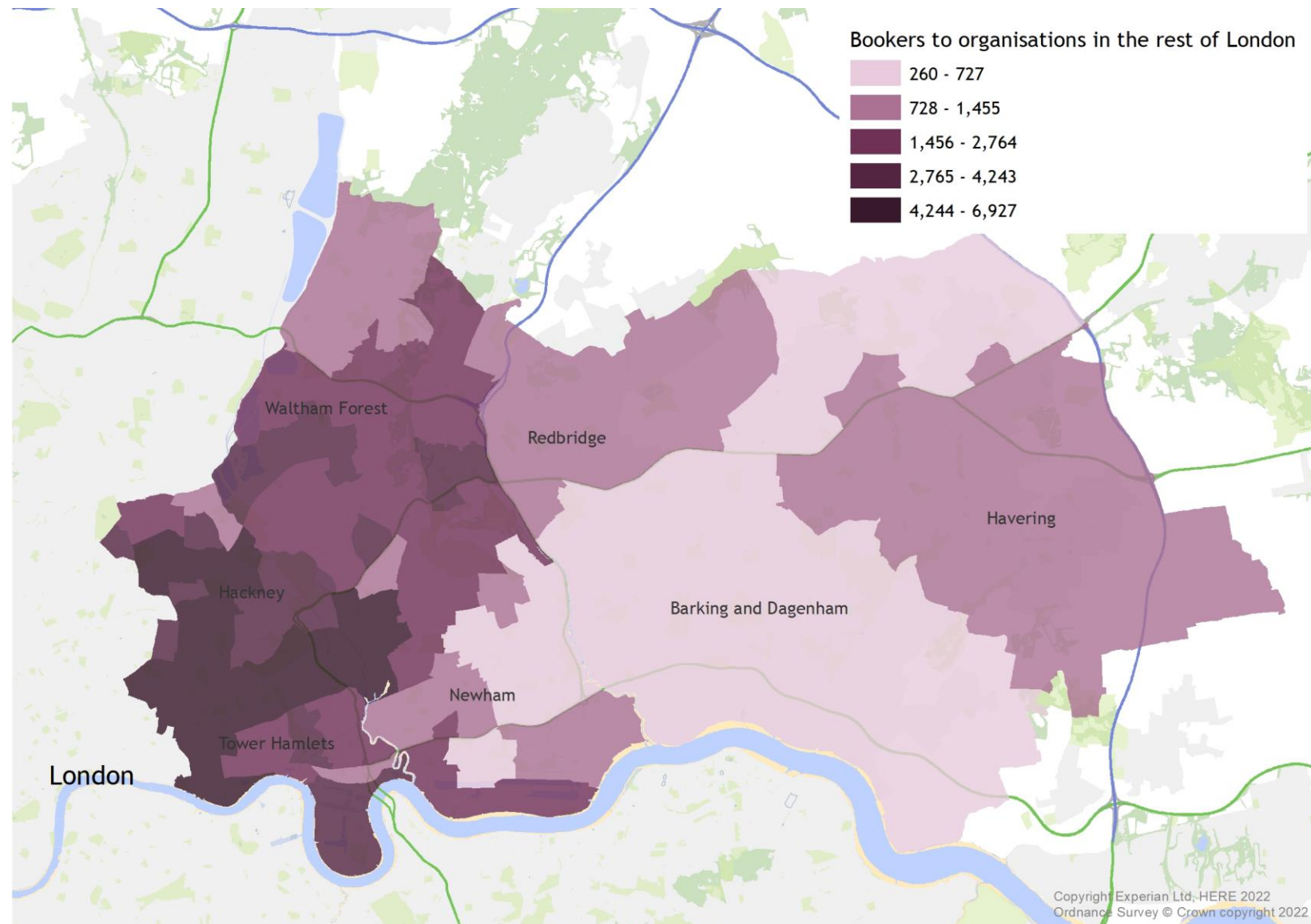
Audience Concentrations



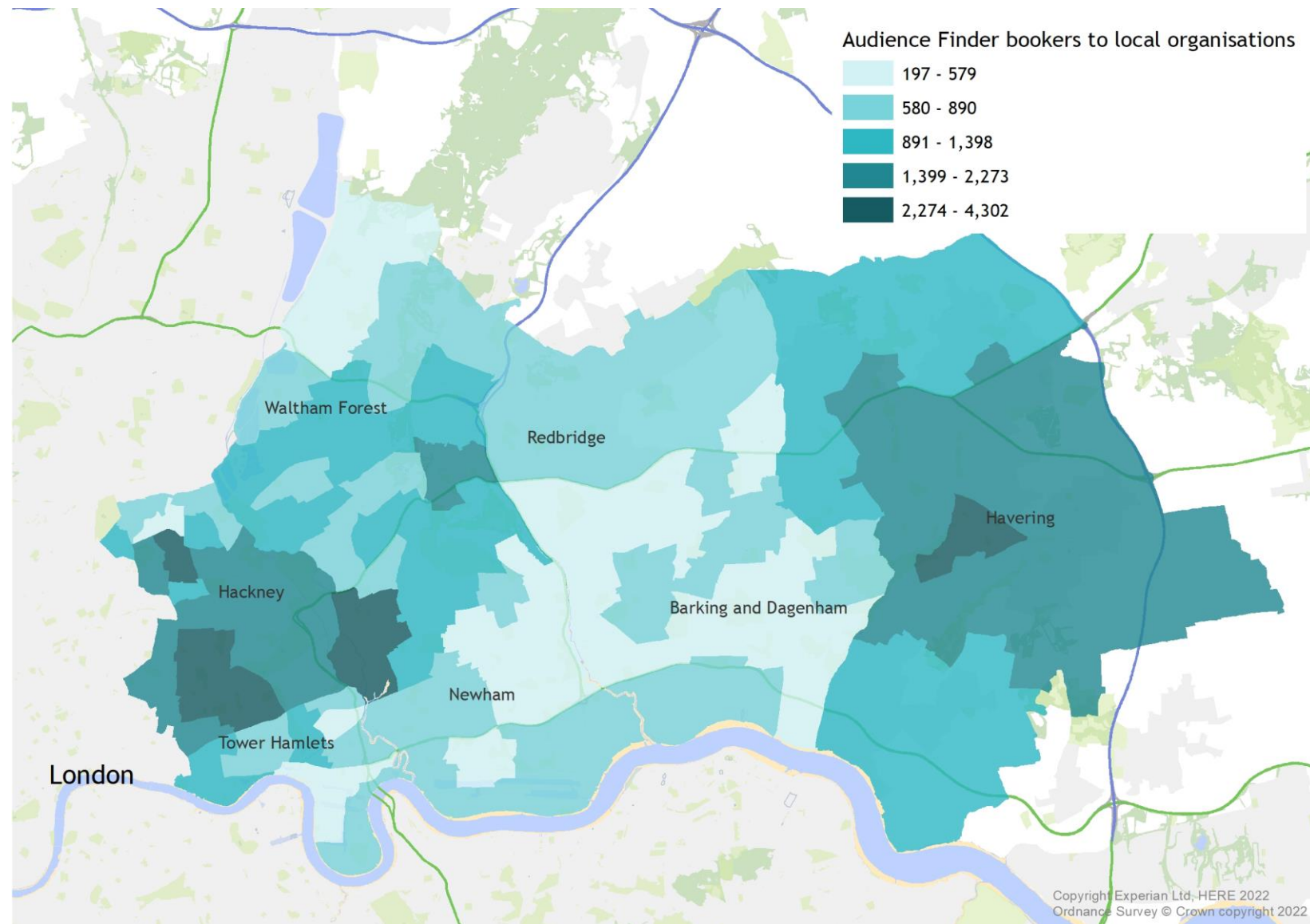
Audience Concentrations



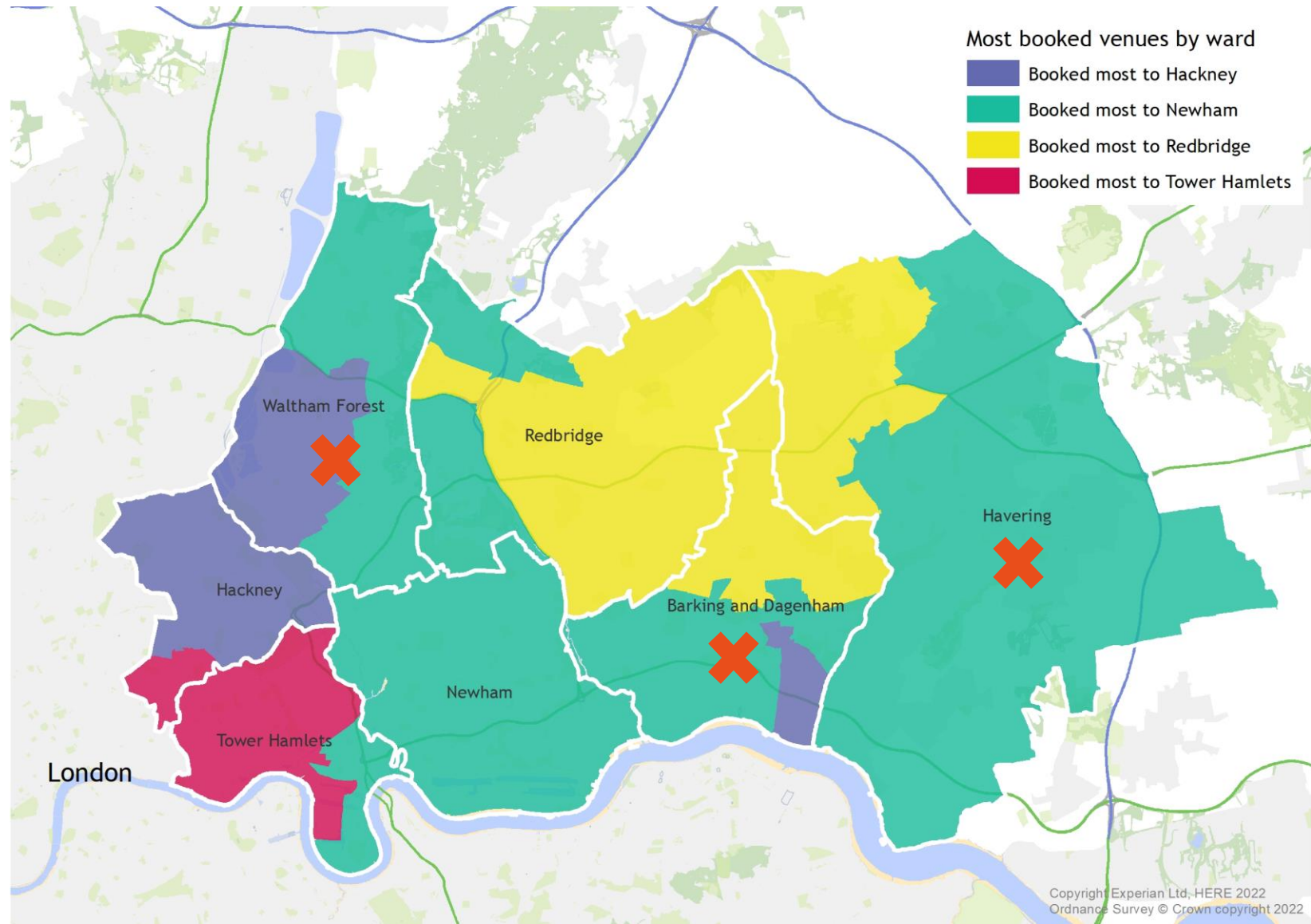
Audience Concentrations – Booking to other organisations in London



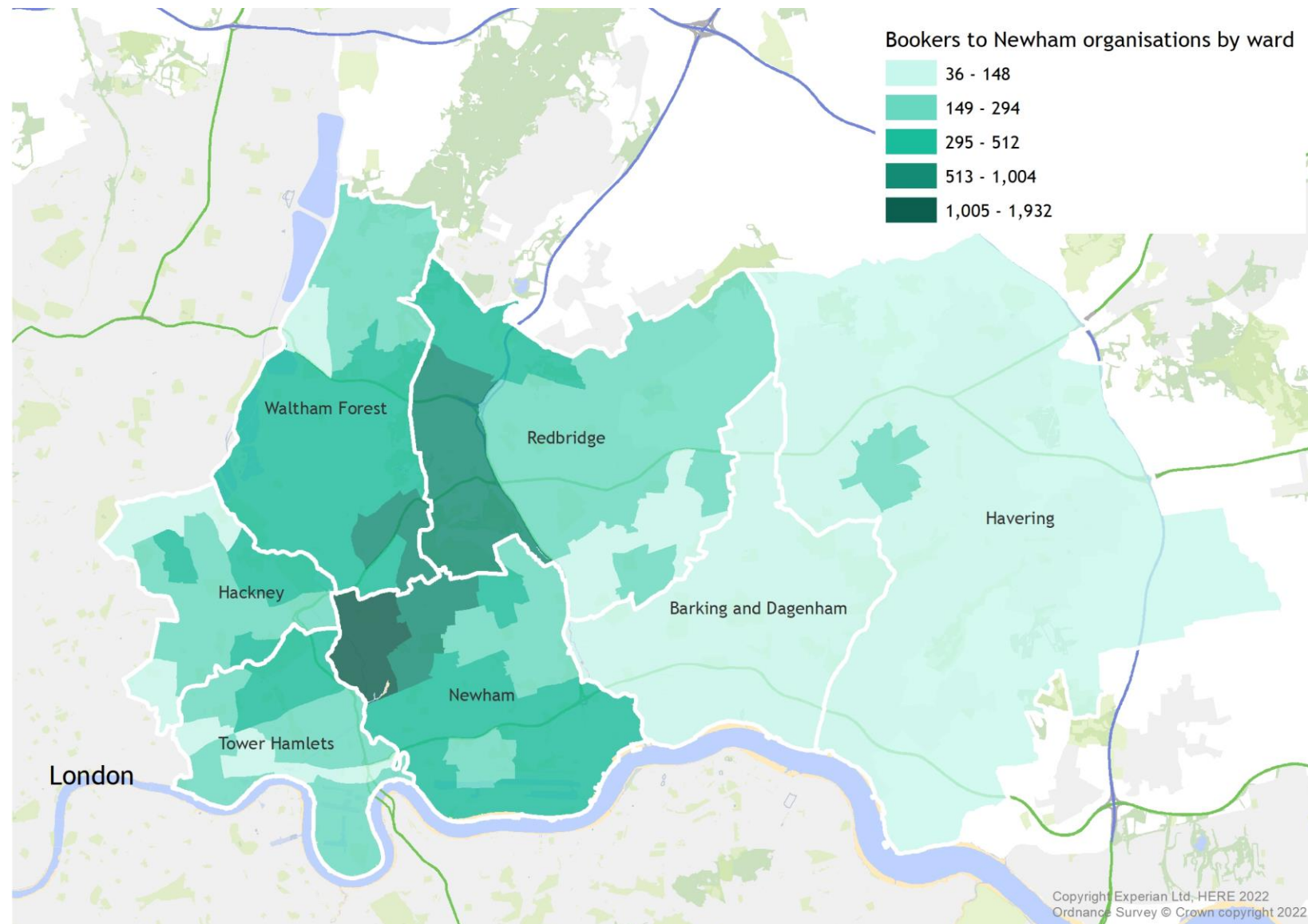
Audience Concentrations – Local organisations



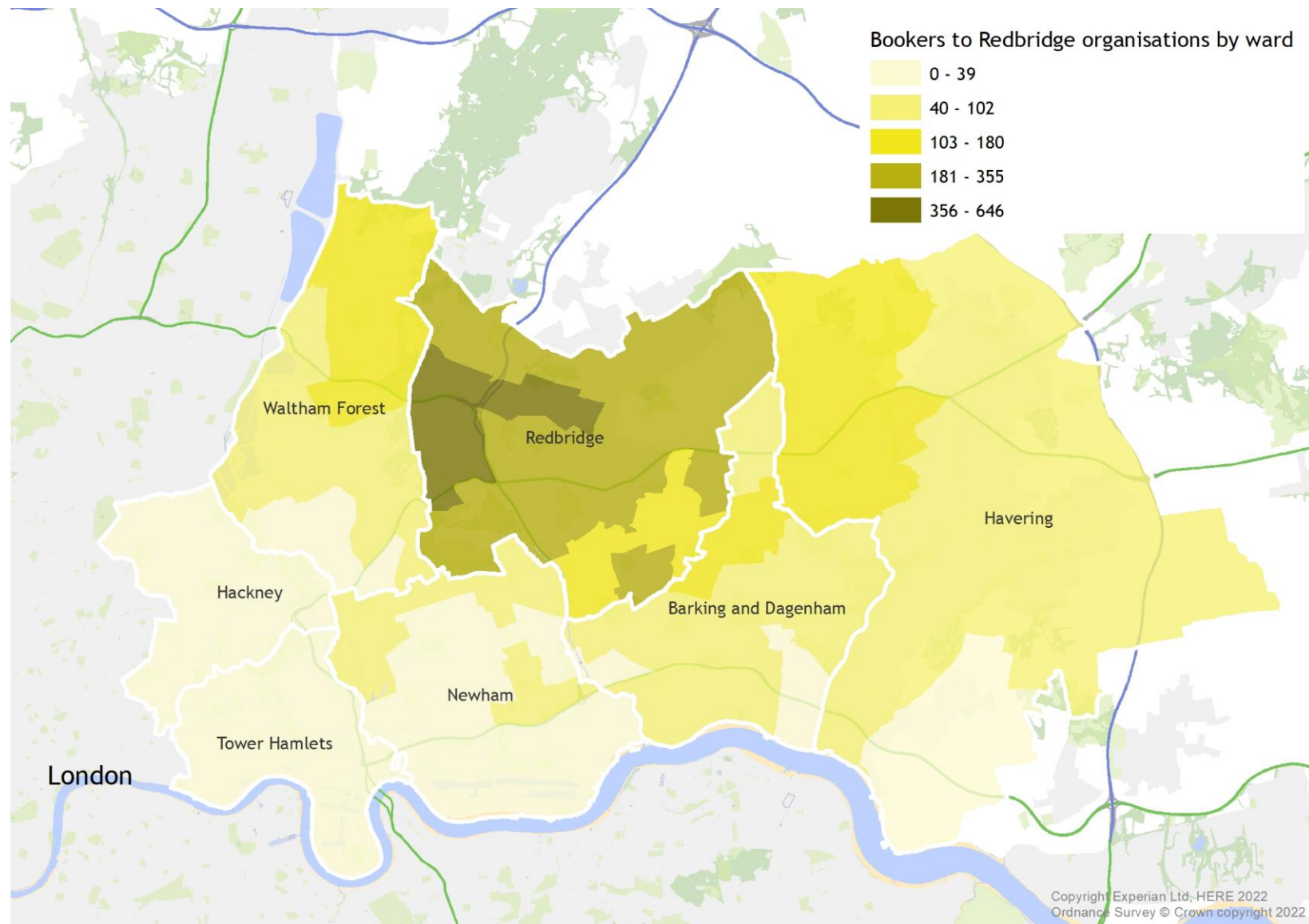
Audience 'Watersheds'



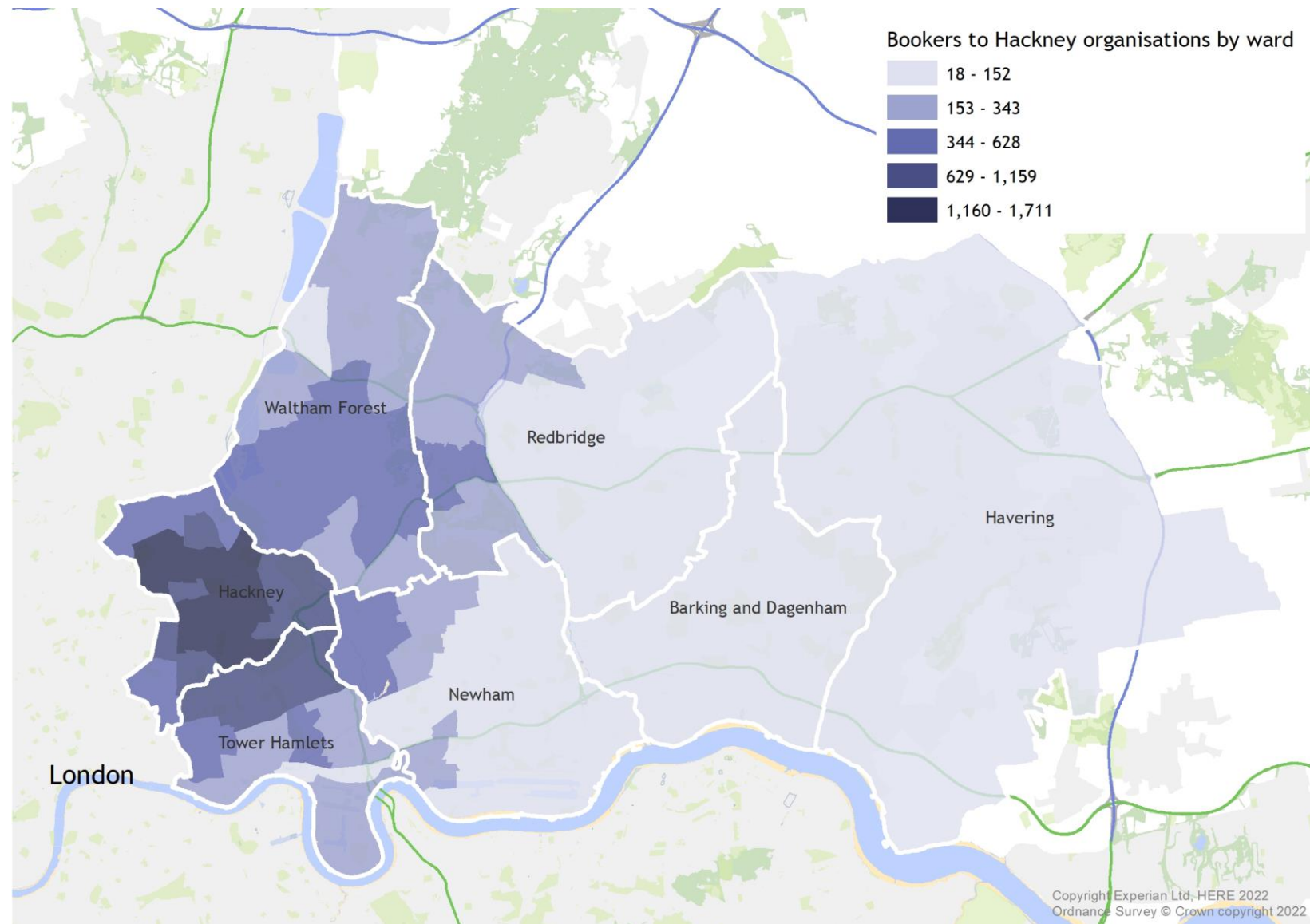
Audience 'Watersheds' Bookers to Newham orgs



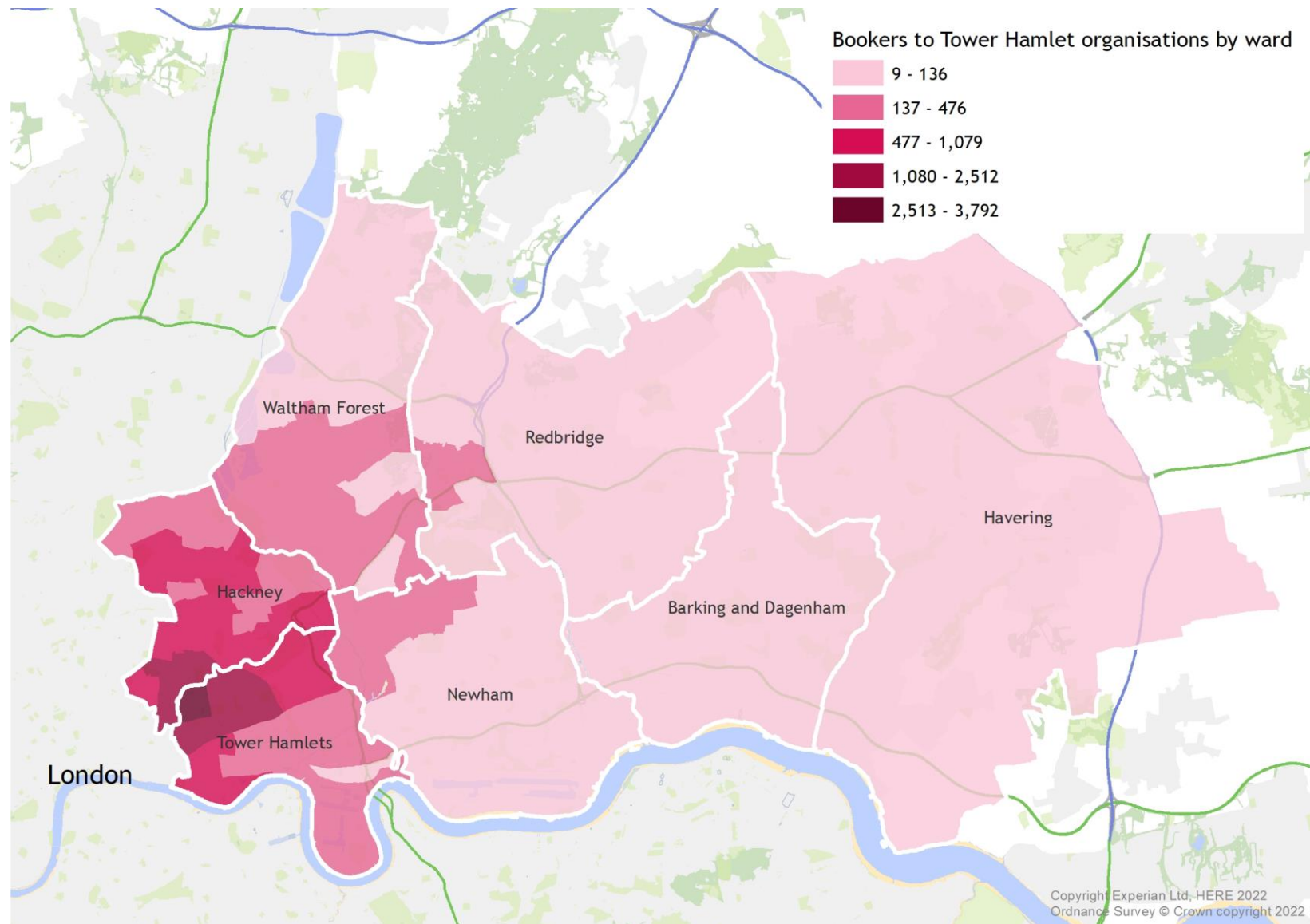
Audience 'Watersheds' Bookers to Redbridge orgs



Audience 'Watersheds' Bookers to Hackney orgs

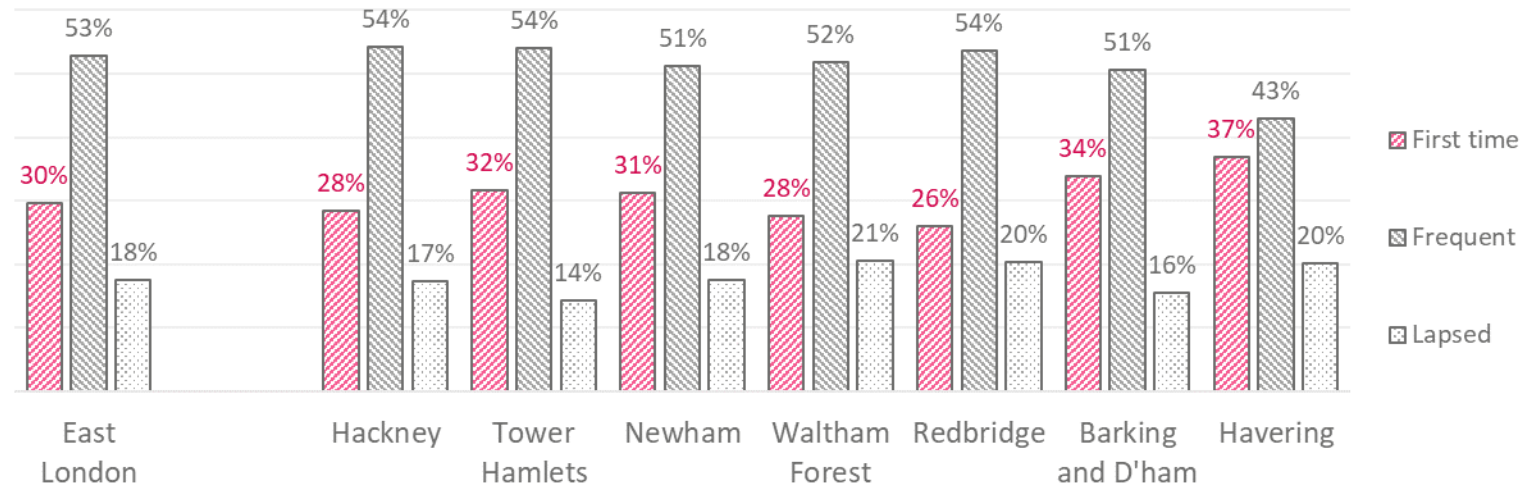


Audience 'Watersheds' Bookers to Tower Hamlets orgs



From Surveys...

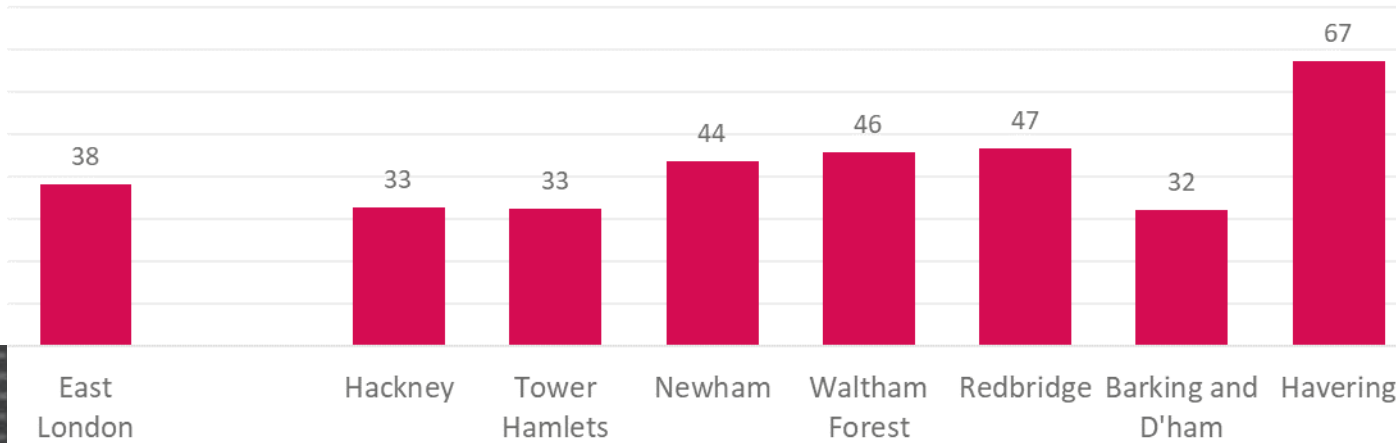
Visitors from East London were more likely to be frequent visitors



More central visitors stayed most local, while visitors from outer boroughs travelled the furthest

‘Frequent’ = visited in prev 12 months
 ‘Lapsed’ = longer ago

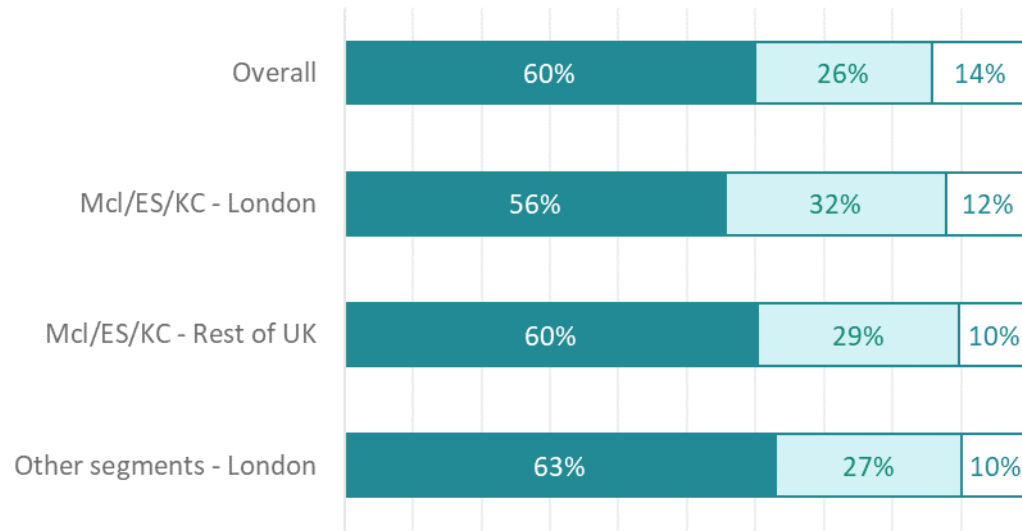
■ Average drive time travelled (minutes)



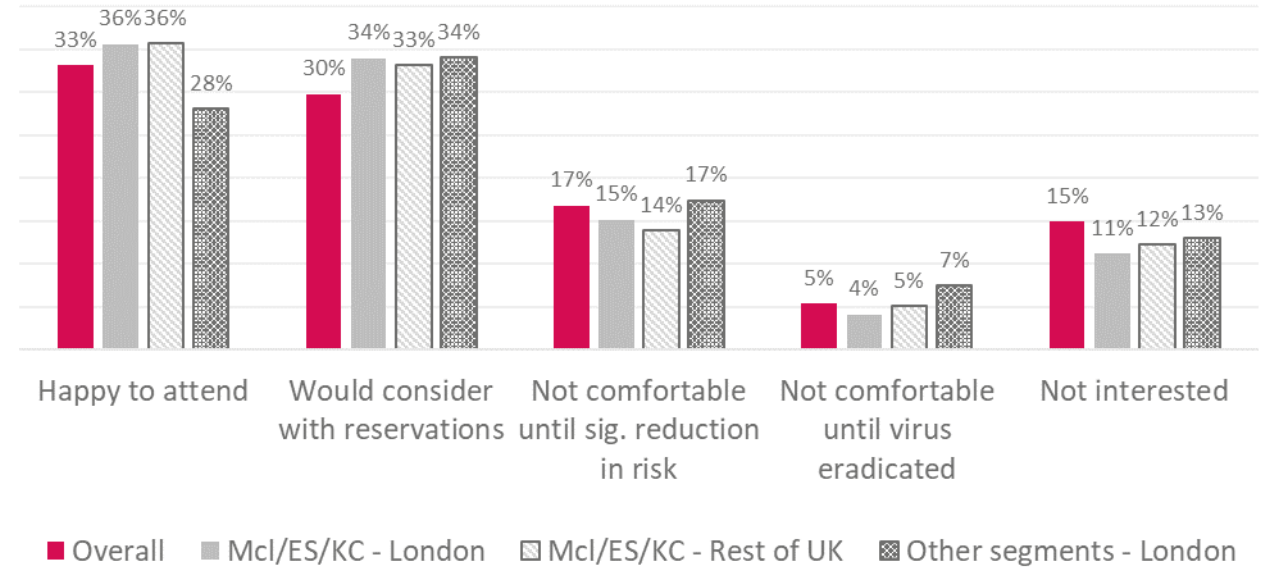
Local Audiences

Cultural Participation Monitor

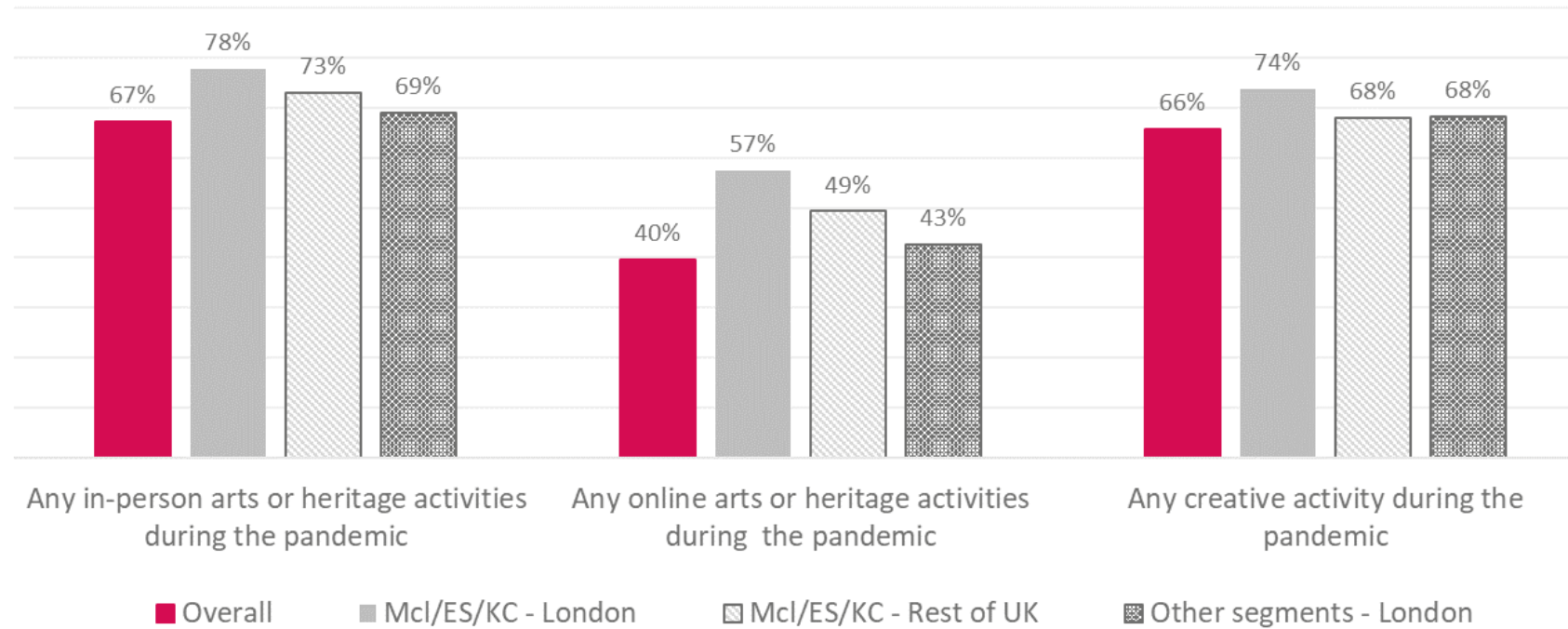
From CPM: Attitudes to COVID



- We should do everything we can to reduce it
- We should make some efforts to try to reduce it, but not go too far
- It's just something we have to accept and try to live normally



From CPM: Engagement during COVID



Discussion

In Conclusion...?

From Evidence Presented:

- Metroculturals / Experience Seekers / Kaleidoscope Creativity key segments in population, bookers (cf. London), and re-keenness to attend/engage.
- Variation by borough: NB Barking & Dagenham (families) and Havering (cf. SE)
- Growth in sales, performances (esp.), families (Trips & Treats), drop in older.
- V local and London-focused attendance.

From Discussion...:

In Conclusion...?

Metroculturals:

- Over-represented x2 cf. population; 1 in 3 bookers
- Generally younger M2 subsegment
- Keener post/during COVID

Experience Seekers:

- 1 in 6 of local population, 1 in 5 bookers.
- More of younger E2 subsegment.
- Keener post/during COVID

Kaleidoscope Creativity:

- Huge part of East London population (42%), 1 in 4 bookers.
- Even split between subsegments (two largest).
- More exposed to cost-of-living crisis?

In Conclusion...?

Immediate:

- Slides (and follow-up conversation?) on the TAA Community (<https://community.theaudienceagency.org/>)
- Survey (!)
- Get in touch with any questions: oliver.mantell@theaudienceagency.org

Future:

- Audience Finder groups
- ‘Know your community’ free surgeries
- In Practice sessions
- Community Forum Live
 - Audience Finder Onboarding (27/4, 25/5)
 - Museums & Visual Arts (28/4)
 - Christmas Shows (26/5)
- TEA Breaks (13/4 & monthly)

Thank you

Please get in touch: theaudienceagency.org
oliver.mantell@theaudienceagency.org

 the audience agency