

Aberdeen City

Market Analysis

Charlotte Wilson Research Services

October 2023

Introduction

- This report provides a cultural market analysis for the city of Aberdeen
- The report outlines
 - Local authority catchment analysis – Aberdeen City
 - Catchment analysis – 30 and 60 min drivetime
 - Modelling potential bookers based on the catchment and local authority populations aligned with attendance levels

Data Sources

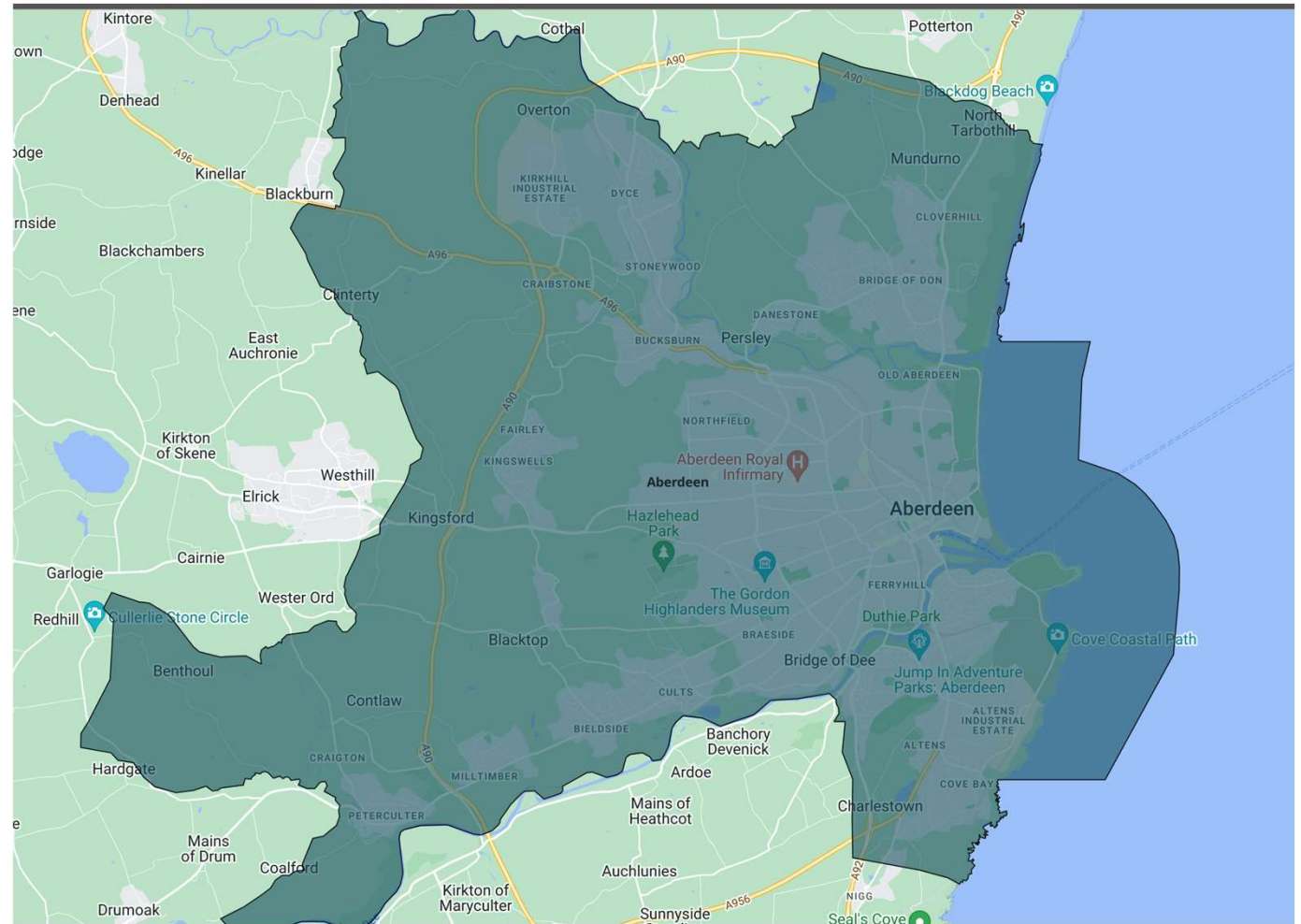
- Census 2022 – Population statistics and households counts
- SIMD – levels of deprivation
- Scottish Household Survey – cultural attendance levels
- Audience Spectrum – Audience Agency
- Mosaic UK
- TGI – cultural attendance levels

Local Authority Analysis

Aberdeen City Council - Top-line Figures:

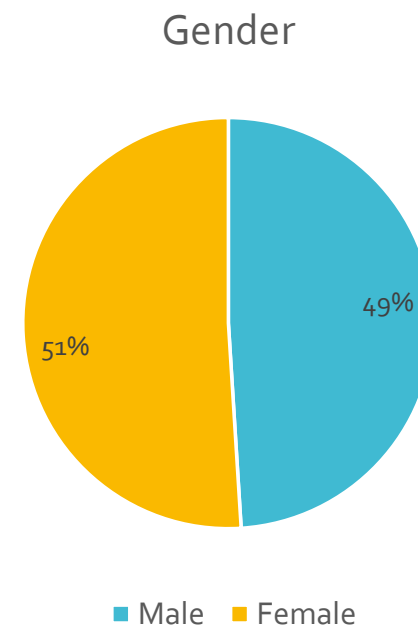
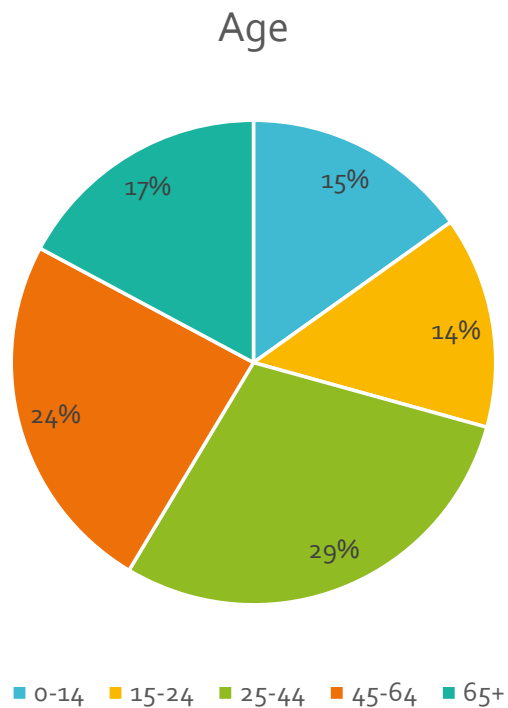
Local Authority area
catchment includes:

- 224,000 people
- 109,500 households



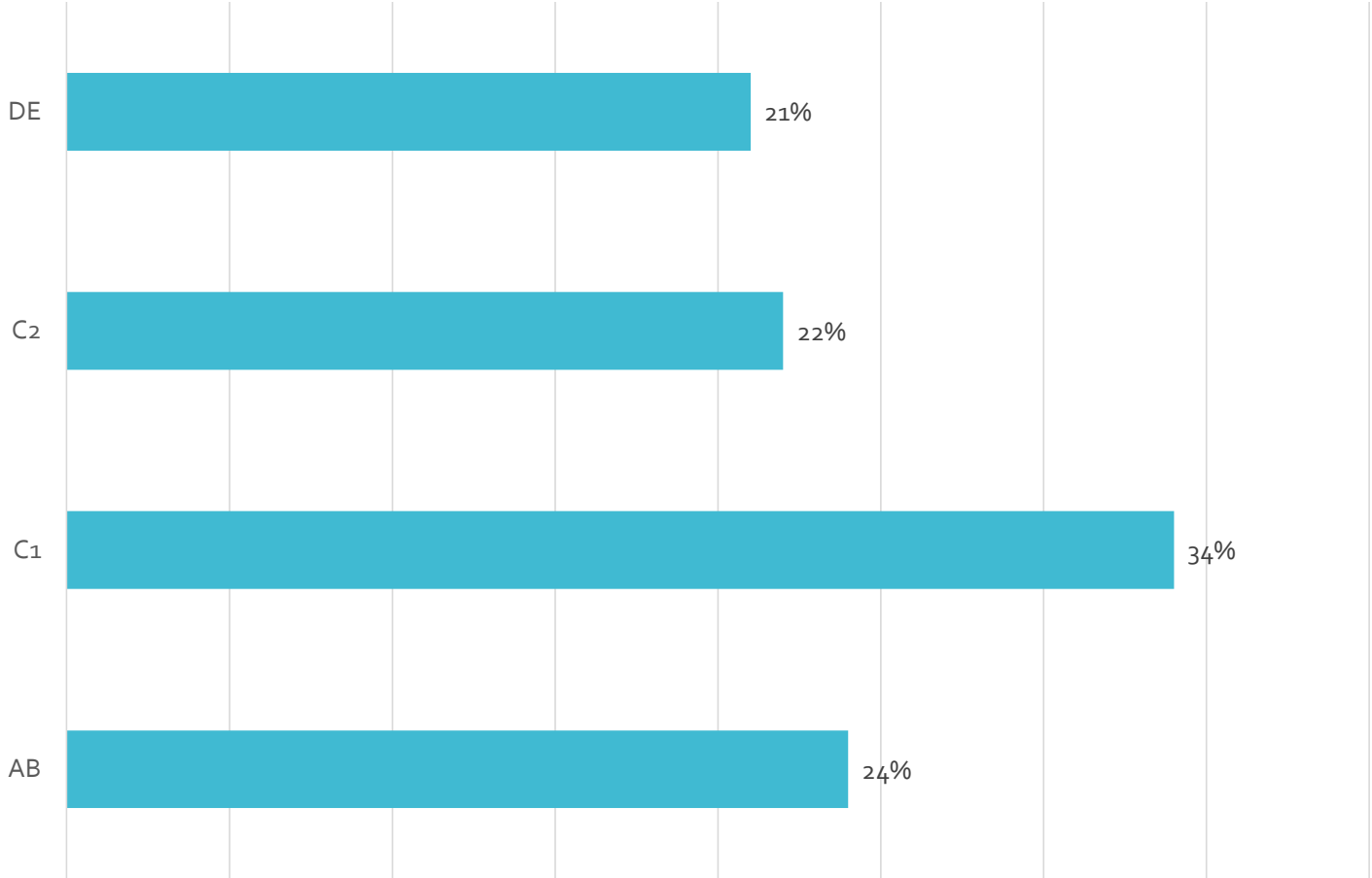
Population Profile:

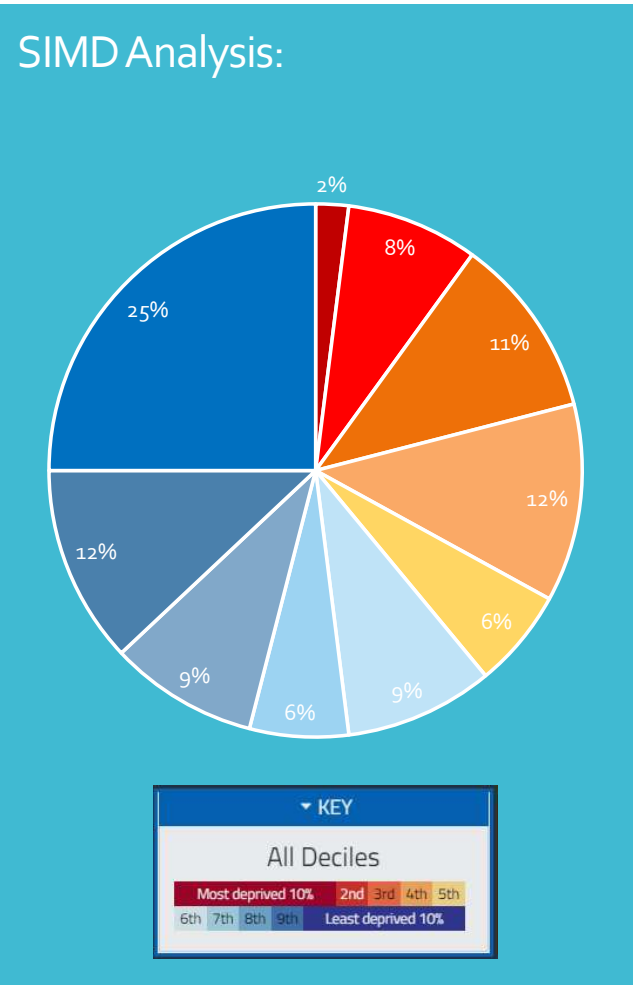
- Similar gender and age profile to Scotland as a whole.
- There is a slight difference in the age groups 25-44. In Aberdeen City there are more of those aged 15-24 than the Scottish average (29% compared with 25% Scotland).



Population Profile

- 58% of the population are described as being ABC1.

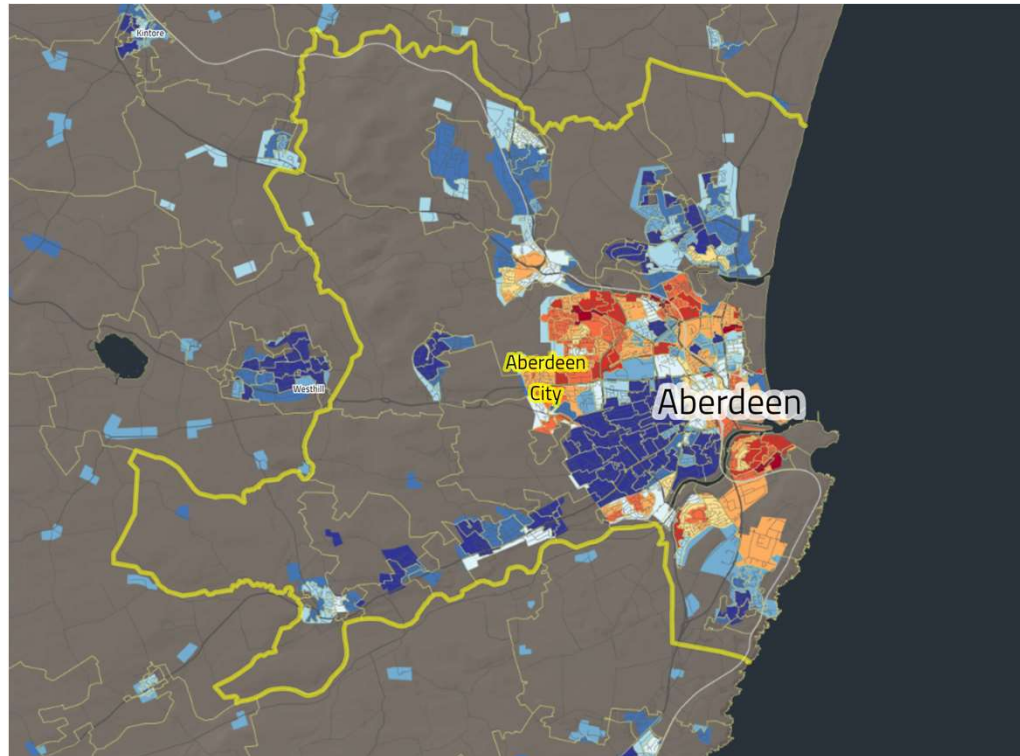




Looking at the SIMD profile of Aberdeen City Local Authority shows that 21% of households are living with high levels of deprivation. (in deciles 1-3).

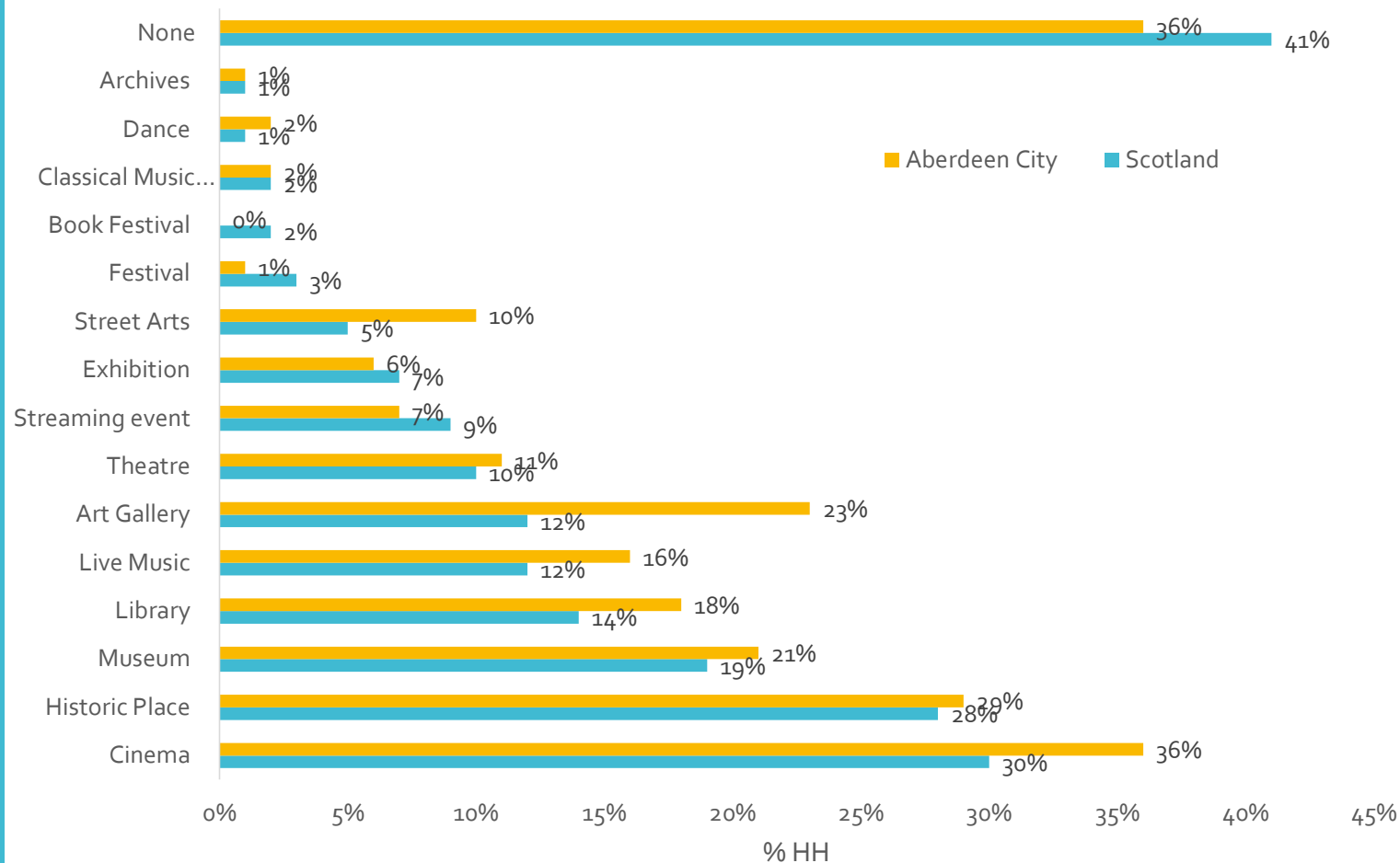
37% of households are living with the lowest levels of deprivation (deciles 9 & 10).

The map below shows the decile distribution across the local authority.



Cultural Attendance:

- *****Considering levels of cultural attendance in Aberdeen City, the local authority has higher levels of attendance to Scotland.
- Significantly attendance at cinema, art galleries and street art events are significantly higher than the Scottish average.
- ** please note, Scottish Household survey methodology changed post covid resulting in significantly lower rates of cultural attendance.

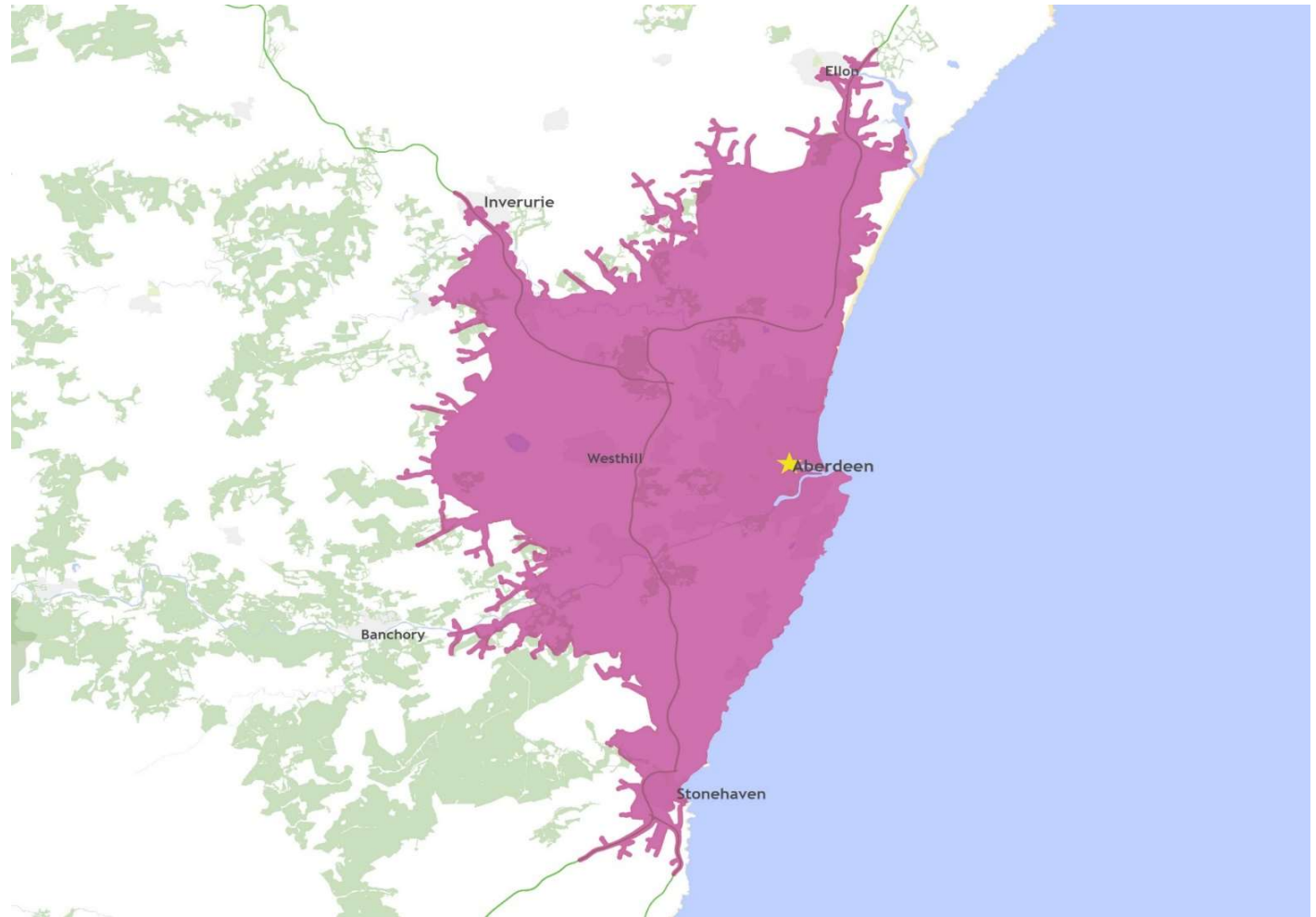


Drivetime Analysis

30 min Catchment Top-line Figures:

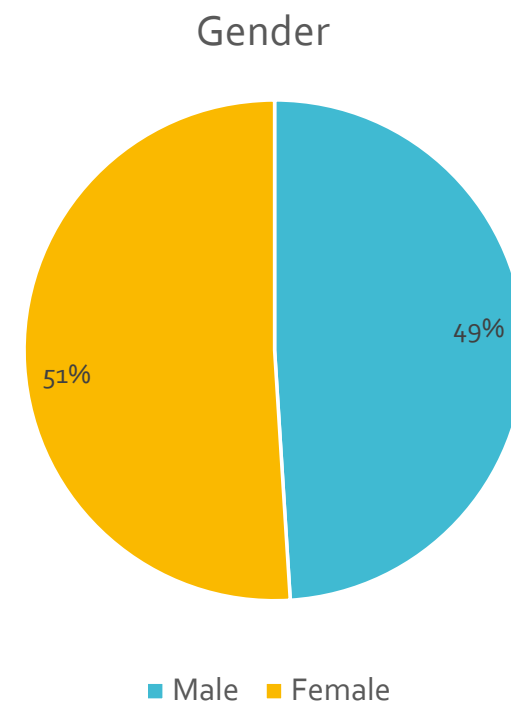
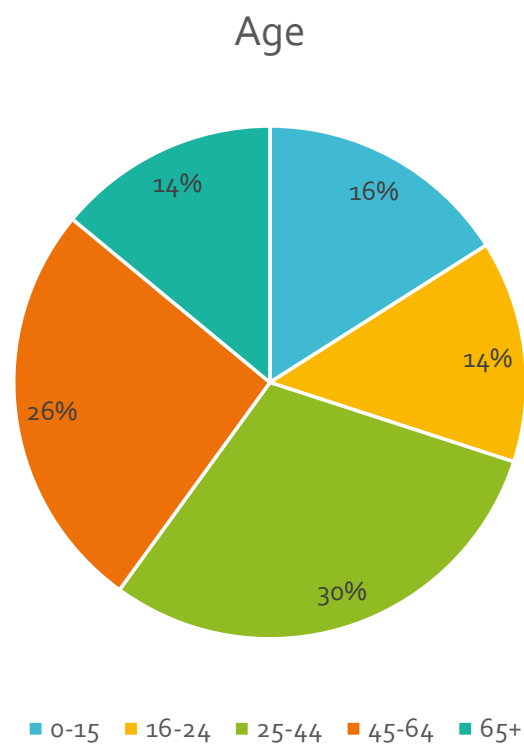
Catchment includes:

- 310,492 people
- 139,443 households



Population Profile: 30 min catchment

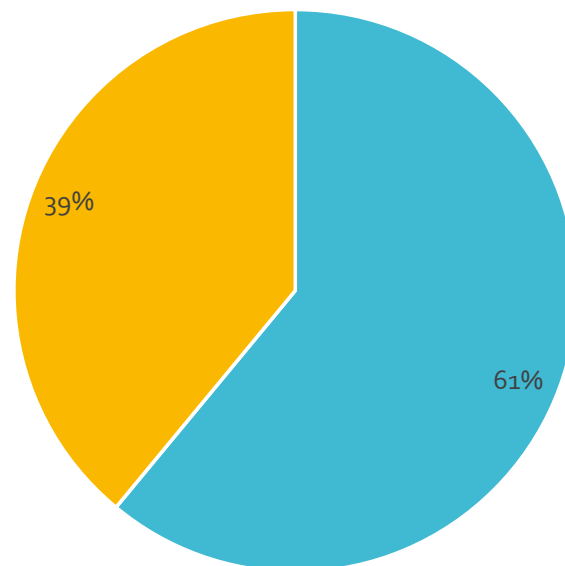
- Similar age and gender profile to the UK .
- There are slightly larger proportions of those aged 25-64 in the 30 min catchment than the UK average (56% v 53% UK).



Population Profile: 30 min catchment

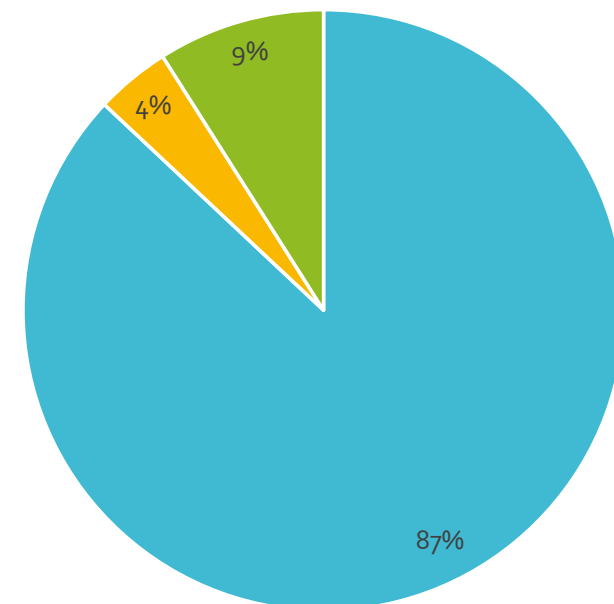
- There are slightly lower levels of dependant children to UK average evident in the catchment (39% v 43% average)
- Similar levels of employment evident (87% compared with 89% UK).

Family Composition



- No dependent children in family
- Any dependent children in family

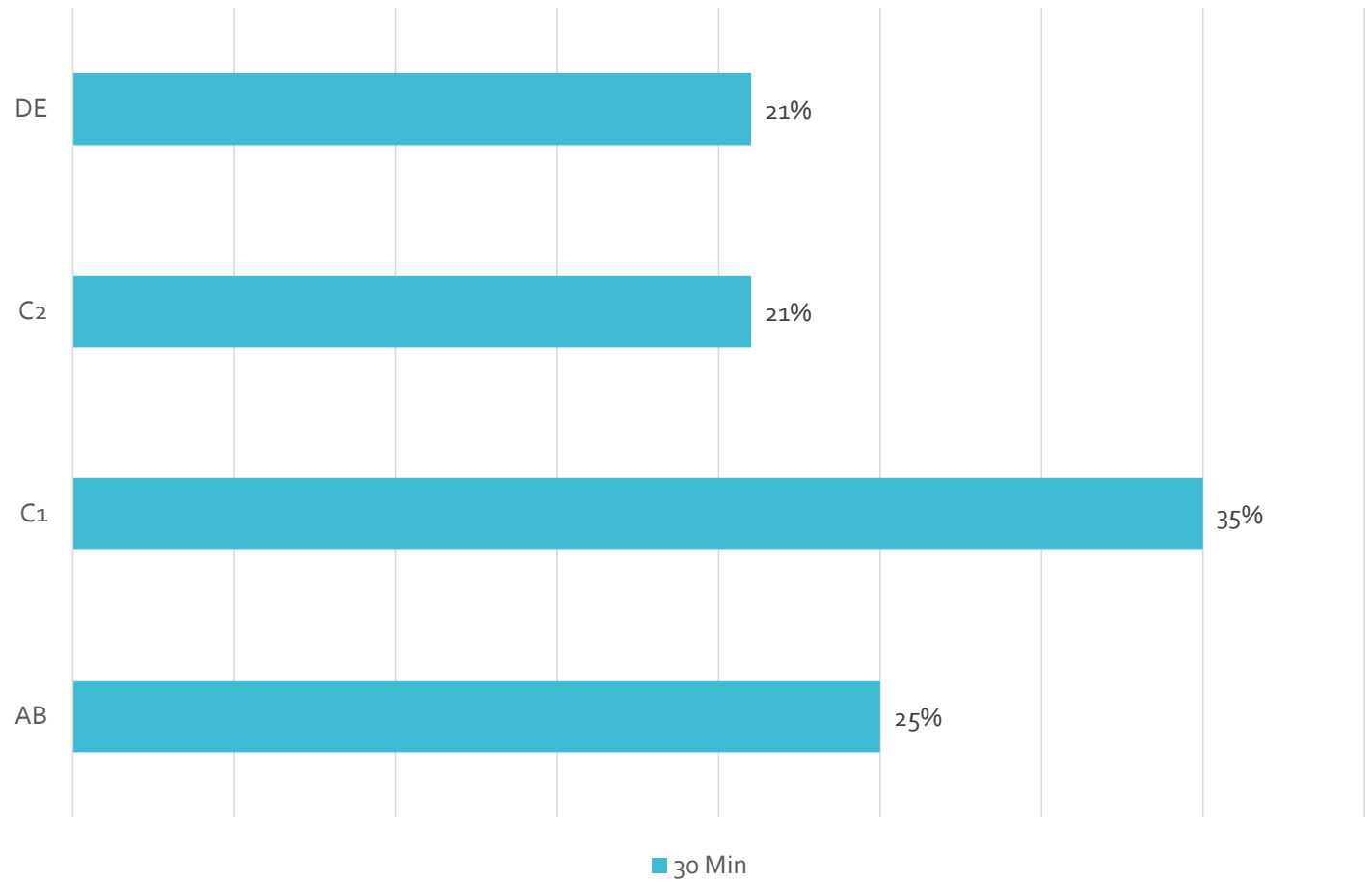
Employment Status



- Employed
- Unemployed
- Full time Student

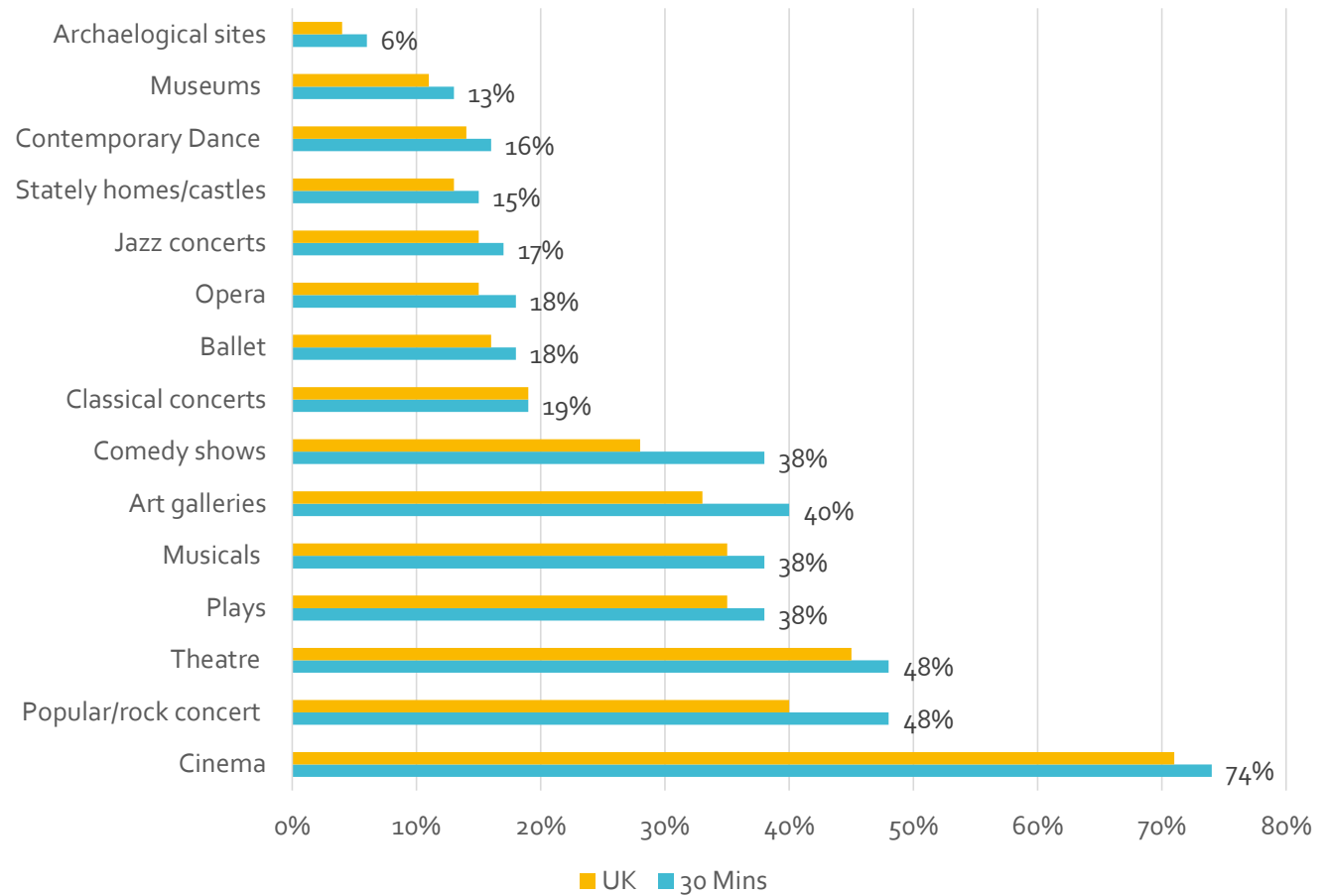
Population Profile: 30 min catchment

- 47% of the population are described as being ABC1.



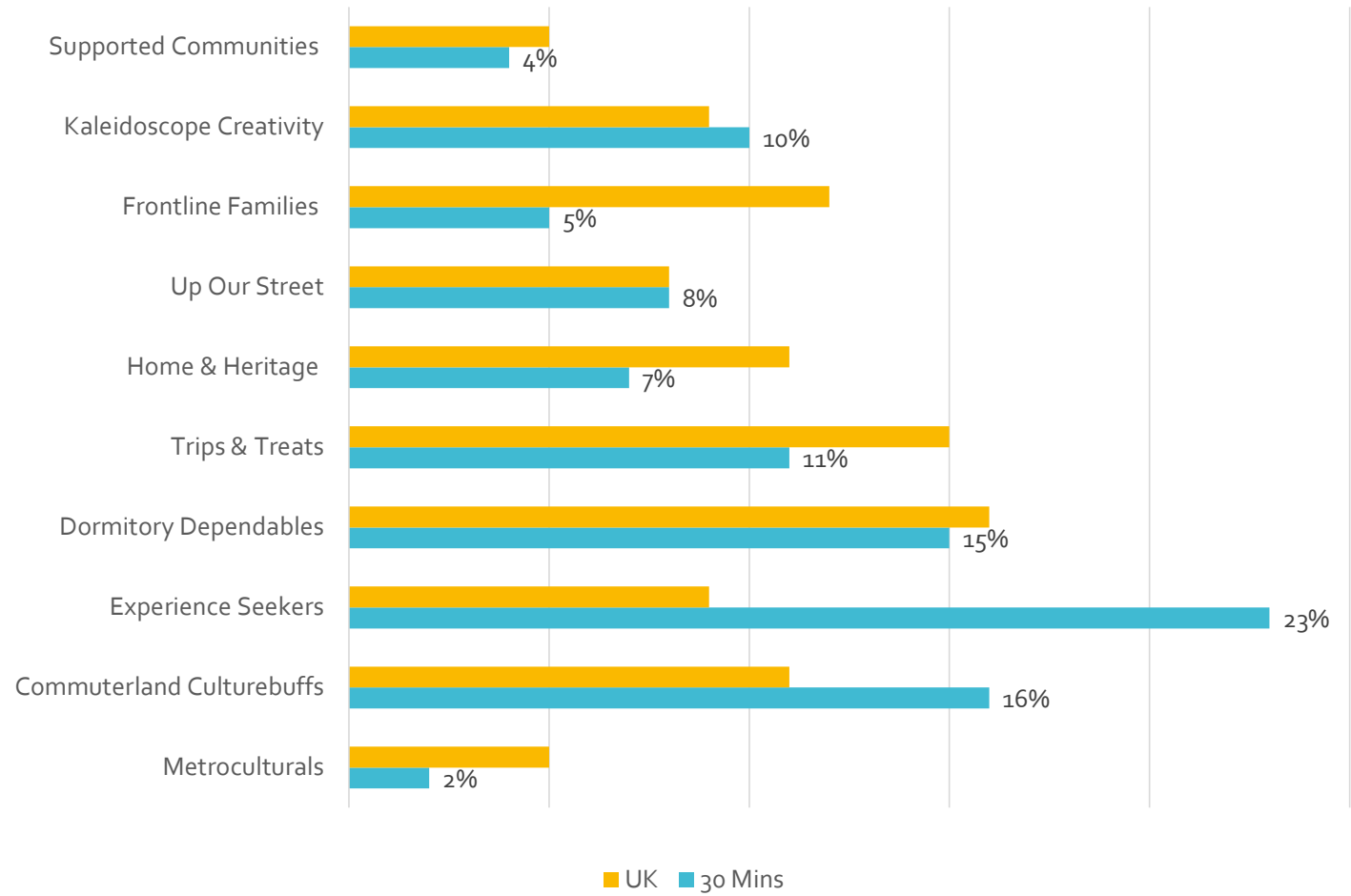
Cultural Attendance: 30 min catchment

- TGI levels of cultural attendance is higher across the board than UK average in the 30 min catchment.
- Significantly, attendance at comedy shows, pop/rock concerts and art galleries are highest in the catchment.



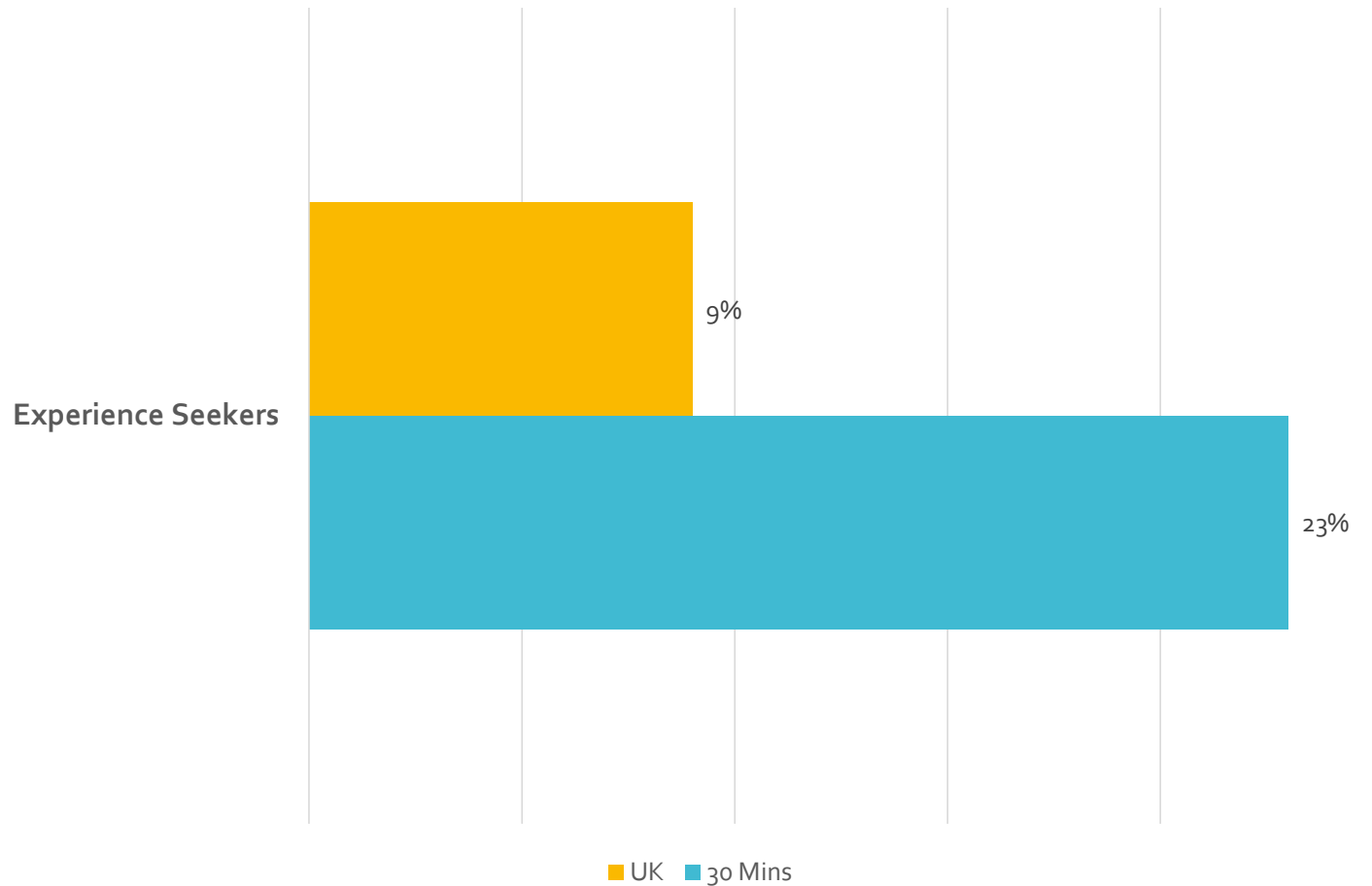
Audience Spectrum: 30 min catchment

- Highest proportion of population in 30 min catchment are described as Experience Seekers, Commuterland Culturebuffs and Dormitory Dependables.
- Experience Seekers are significantly overrepresented in comparison to UK average.



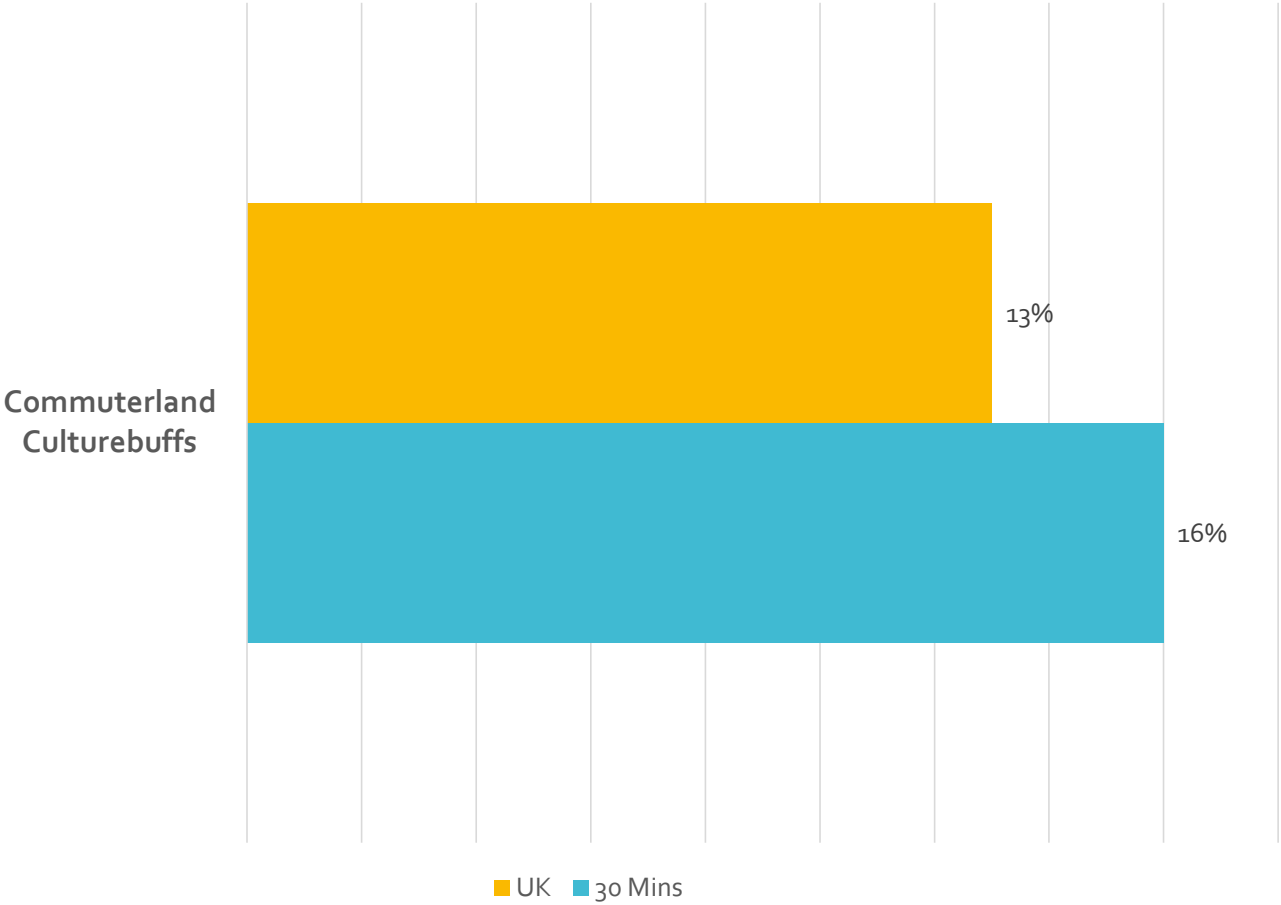
Audience Spectrum

- Younger and lively group of mixed prosperity professionals from a range of backgrounds.
- Very engaged in culture and they are motivated to seek out new experiences as part of their regular social lives.
- They actively look for discounts in order to try a wide variety of activities.
- They are open to anything but prefer contemporary, immersive and participatory arts.
- They are digitally confident and use the internet to access almost all of their information about events.



Audience Spectrum

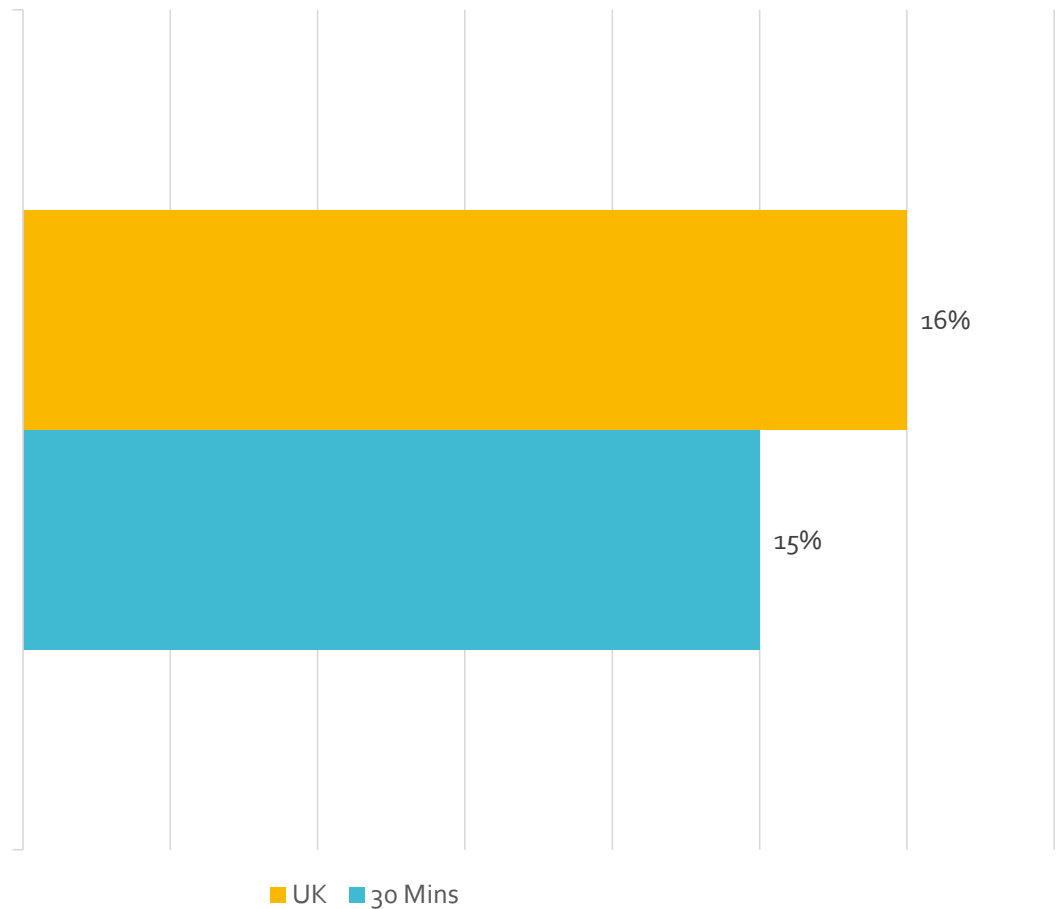
- Middle aged group of older families and empty nesters.
- They have a considerable disposable income and time to pursue their interests and enjoy leisure activities.
- They are regular attenders and enjoy a variety of artforms.
- They also donate generously.
- They use cultural organisations websites to plan activities.



Audience Spectrum:

- Includes families of all ages.
- They have solid careers and the means to enjoy leisure time.
- Trips to arts and culture mark special occasions with friends and families.
- They seek out discounts and offers.
- They enjoy history and heritage as well as museums and other mainstream arts. They like live music.
- They have average levels of attendance and are willing to travel to see something as a treat.
- They like to find information online and use it to plan activities and read the news.

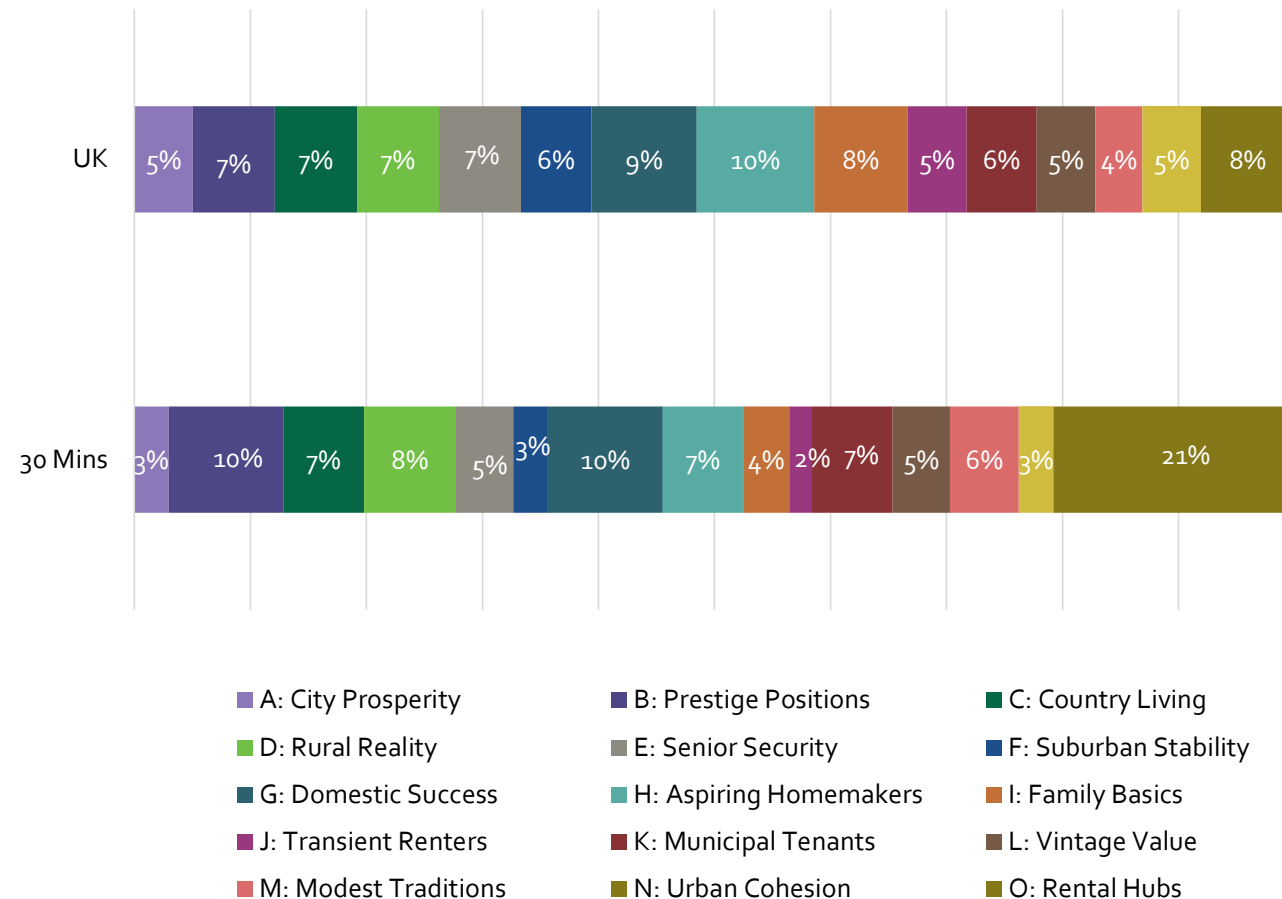
Dormitory Dependables



Mosaic UK: 30 min catchment


Mosaic profile of catchment:

- The catchment profile is similar to the UK profile, however there are some differences particularly amongst the most prevalent groups.
- This highest occurring group in the catchment population is Rental Hubs which is significantly overrepresented.
- This is followed by Prestige Positions and Domestic Success.



Mosaic: Rental Hubs


- Young people enjoying city lifestyles in accessible locations.
- Usually aged in their twenties and thirties.
- Many live alone, others share with housemates or partners.
- Most are well educated and have university degrees or are studying for them.
- Accommodation is usually apartments/flats and rented from private landlords.
- Internet is a big part of their lives. Communications revolve around smart phones. They check social media regularly and rely on wireless connections outside of home.
- Consume music and entertainment online.



Rental Hubs

Educated young people privately renting in urban neighbourhoods

🏠 7.75% | 6.51% 👤



Who We Are


Age 🎂	Household income 🏠
26–35	£30k–£39,999
202 39.0%	155 24.8%
Household composition 👤	Number of children 👤
Single	No children
142 56.2%	126 87.4%
Tenure 🤝	Residency type 🏠
Rented	Flat
333 59.9%	354 81.9%


Advert Response Channel


📞 103	🌐 109	@ 151
TV 145	✉️ 113	🛒 126


Key Features


- Young singles and homesharers
- Rent flats
- Very high internet use
- Internet via smartphone
- Watch videos online
- Don't use landlines














Mosaic UK

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Household Technology



Very High

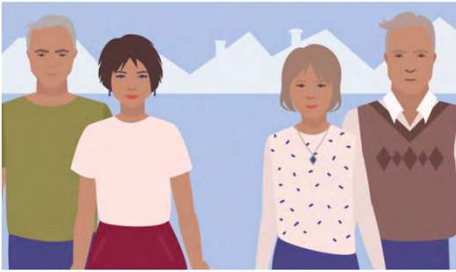
Mosaic: Prestige Positions

- Affluent families who live in spacious homes in sought after neighbourhoods.
- They live in large detached homes that have significant market value and are located in the suburbs of cities or in nearby towns or villages with good transport connections.
- They are highly educated and have achieved success in their careers, working in high level roles and earning good salaries.
- They often have more than one car.

B Prestige Positions

Established families in large detached homes living upmarket lifestyles

🏠 7.39% | 👤 8.93%



Who We Are


Age 🎂	Household income 🏠
56–65	£150k+
161 24.6%	645 9.3%
Household composition 👨‍👩‍👧	Number of children 👨‍👩‍👧
Family	No children
185 42.4%	107 74.0%
Tenure 🤝	Residency type 🏠
Owned	Detached
147 94.9%	398 73.9%


Advert Response Channel


📞 76	🌐 111	📧 100
📺 84	✉️ 67	🛒 87


Key Features


- Own large, detached houses
- Highly educated
- High discretionary income
- Garden or allotment
- Pay credit cards in full
- Breakdown cover












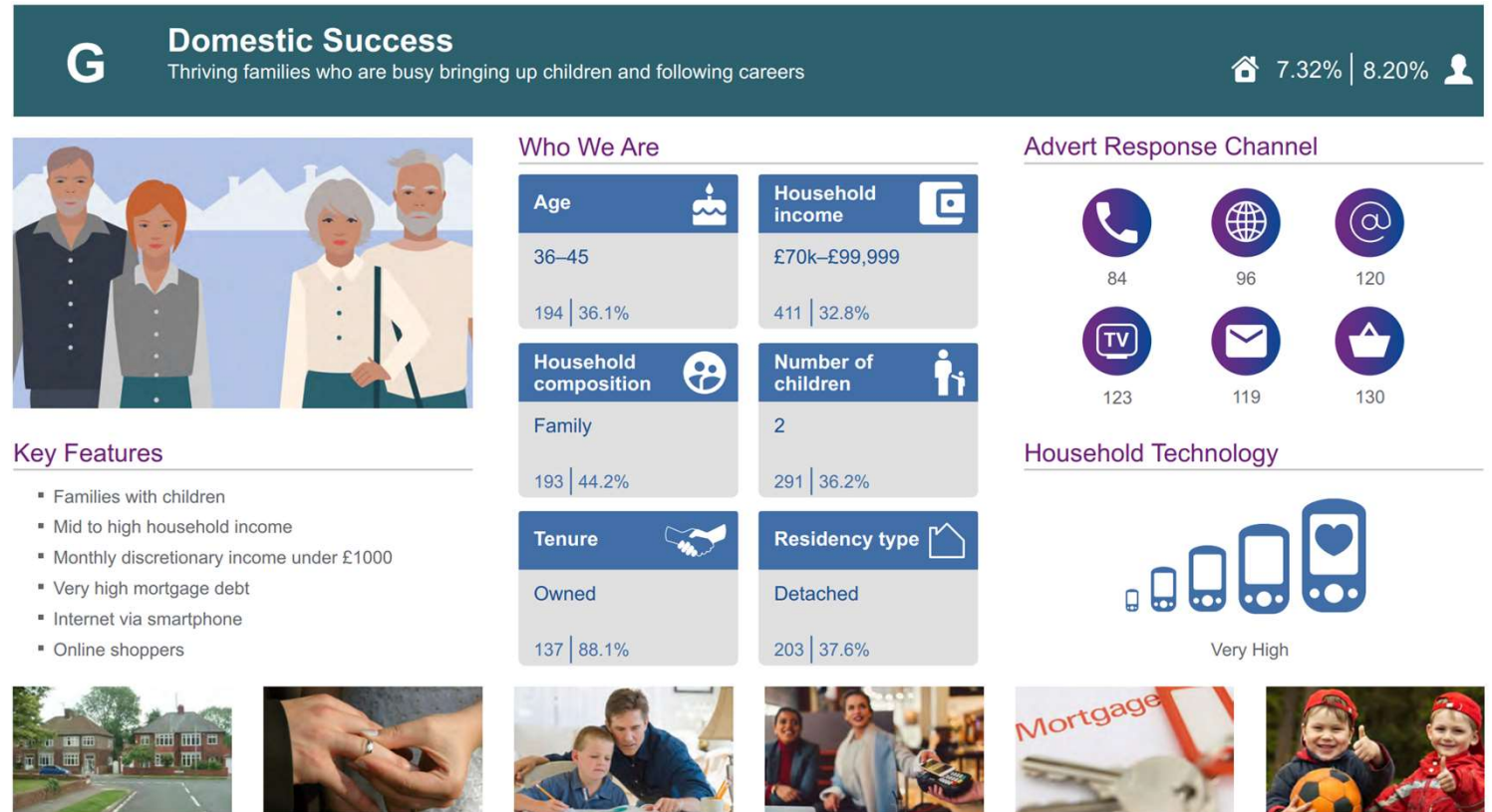


Mosaic UK

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Mosaic: Domestic Success

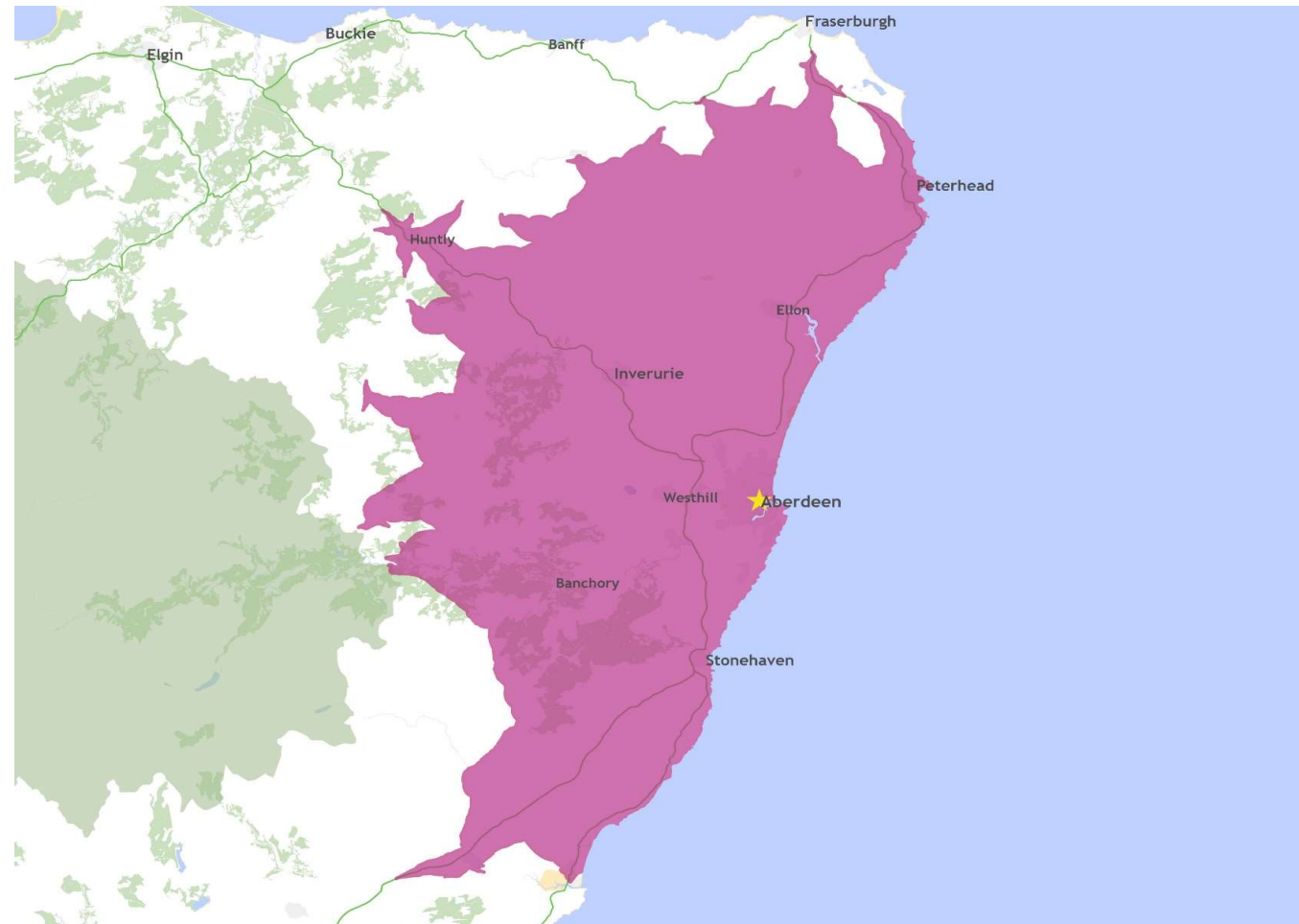
- Householders in middle years who have made progress in careers and live in comfortable family homes.
- Mostly couples in 30s and 40s and usually have children.
- They live in good quality houses of above average market value meaning high mortgage payments.
- Adults work in high level roles earning good salaries. Both parents work though one may work part time.
- These families are short of time.
- Internet is used for practical ways to get things done and for information.
- Use internet also to check prices and reviews before purchasing.
- Many have groceries delivered.



60 min Catchment Top-line Figures:

Catchment includes:

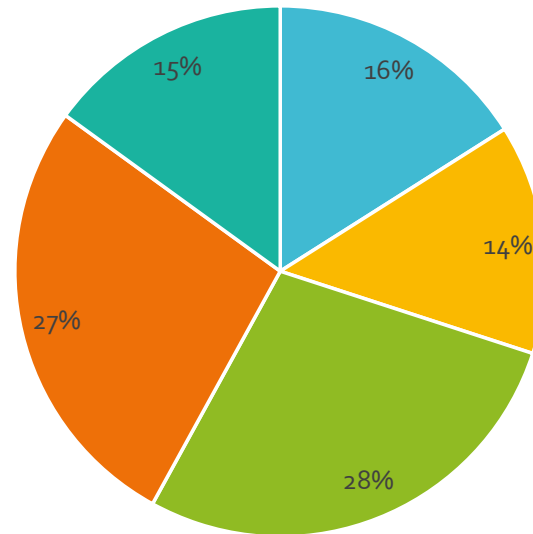
- 475,167 people
- 208,921 households



Population Profile: 60 min catchment

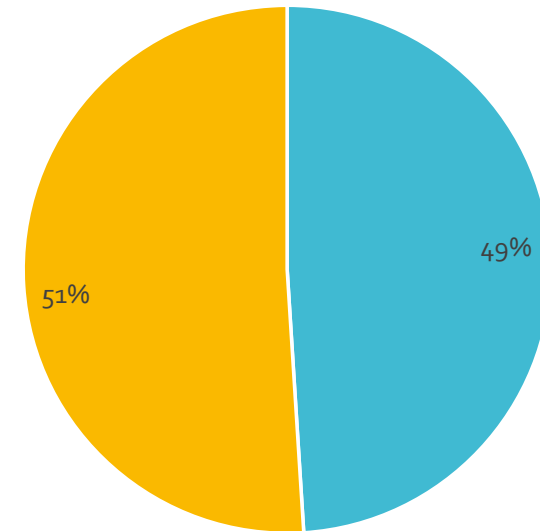
- The gender and age profile of the 60 min catchment is very similar to that of the 30 min catchment.

Age



■ 0-15 ■ 16-24 ■ 25-44 ■ 45-64 ■ 65+

Gender

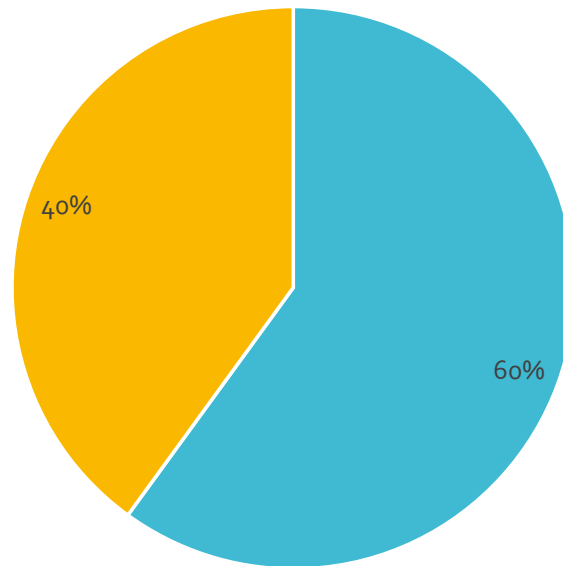


■ Male ■ Female

Population Profile: 60 min catchment

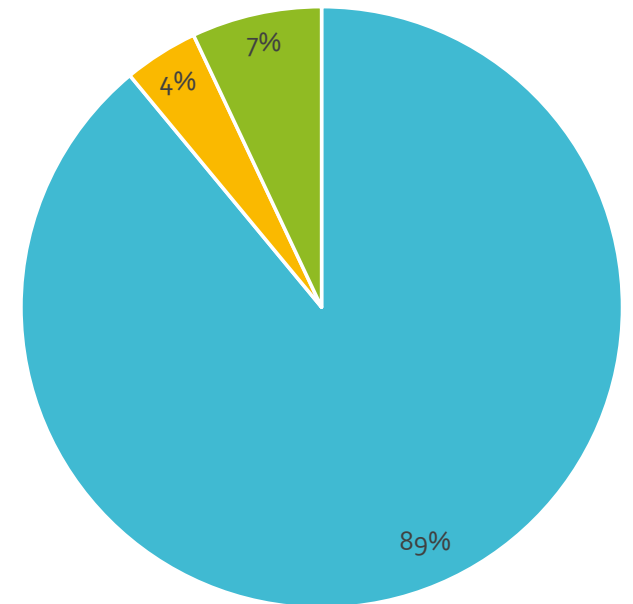
- Similar levels of dependant children to UK average (40% v 43% average)

Family Composition



■ No dependent children in family
■ Any dependent children in family

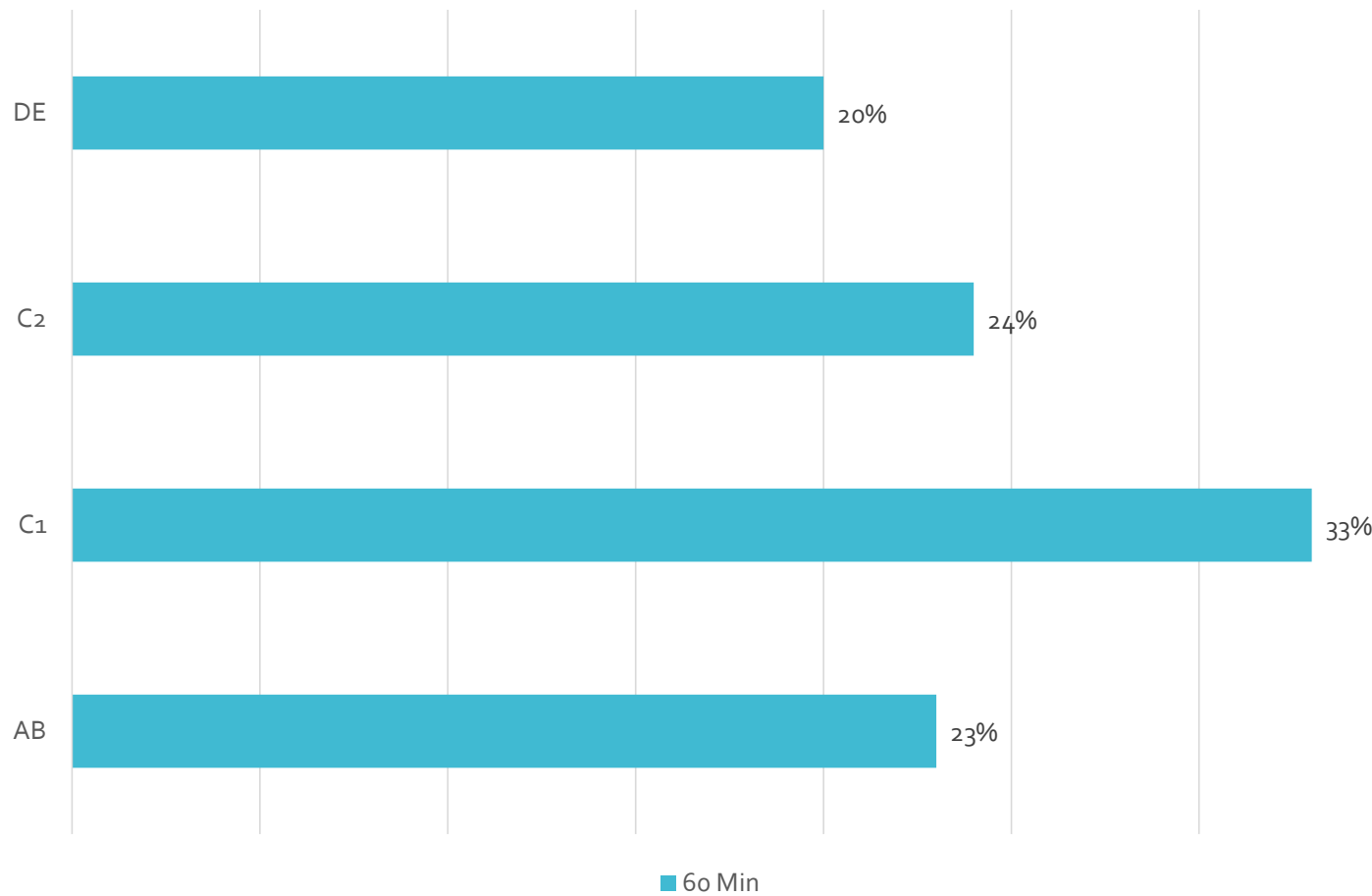
Employment Status



■ Employed ■ Unemployed ■ Full time Student

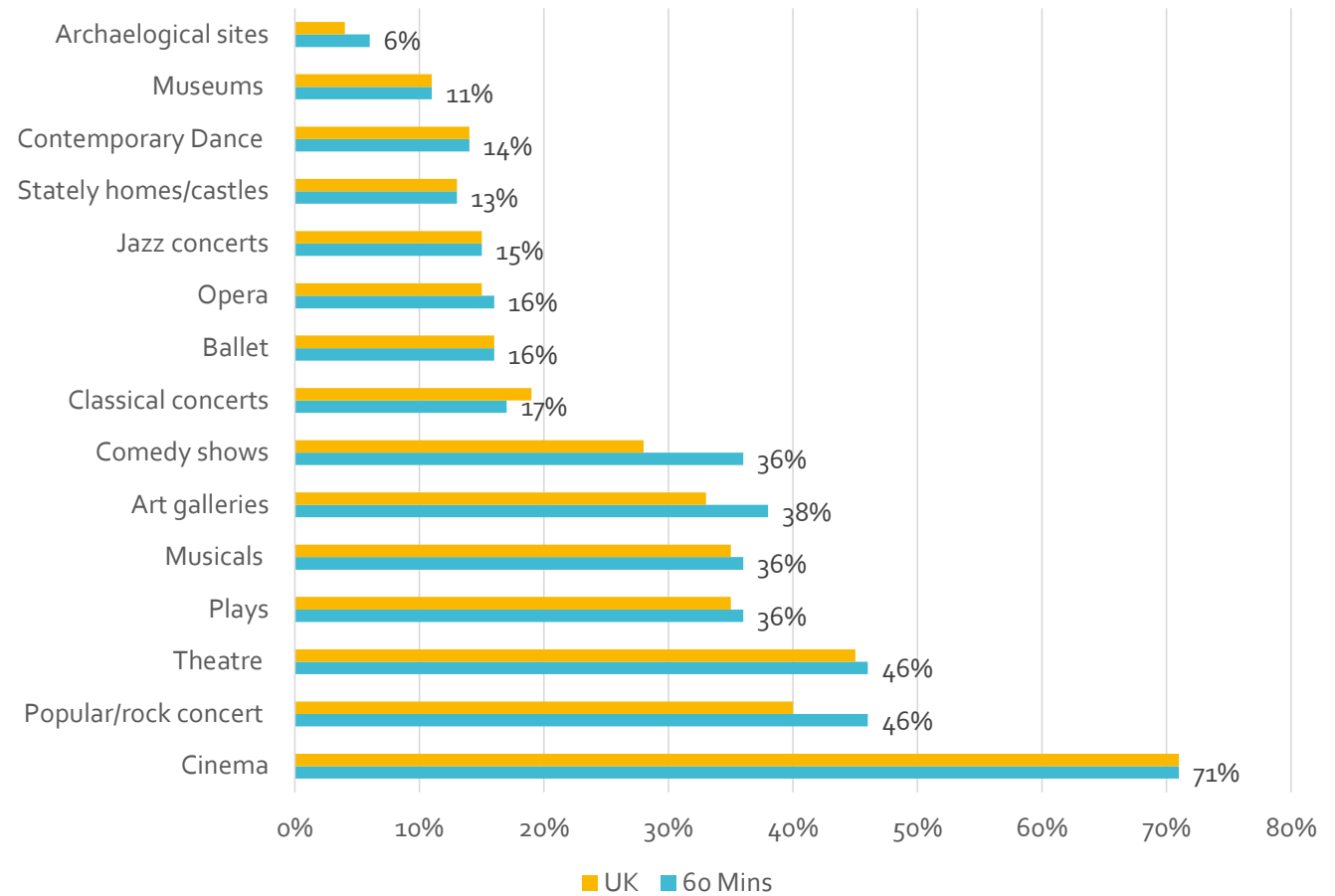
Population Profile: 60 min catchment

- 56% of the population are described as being ABC1.



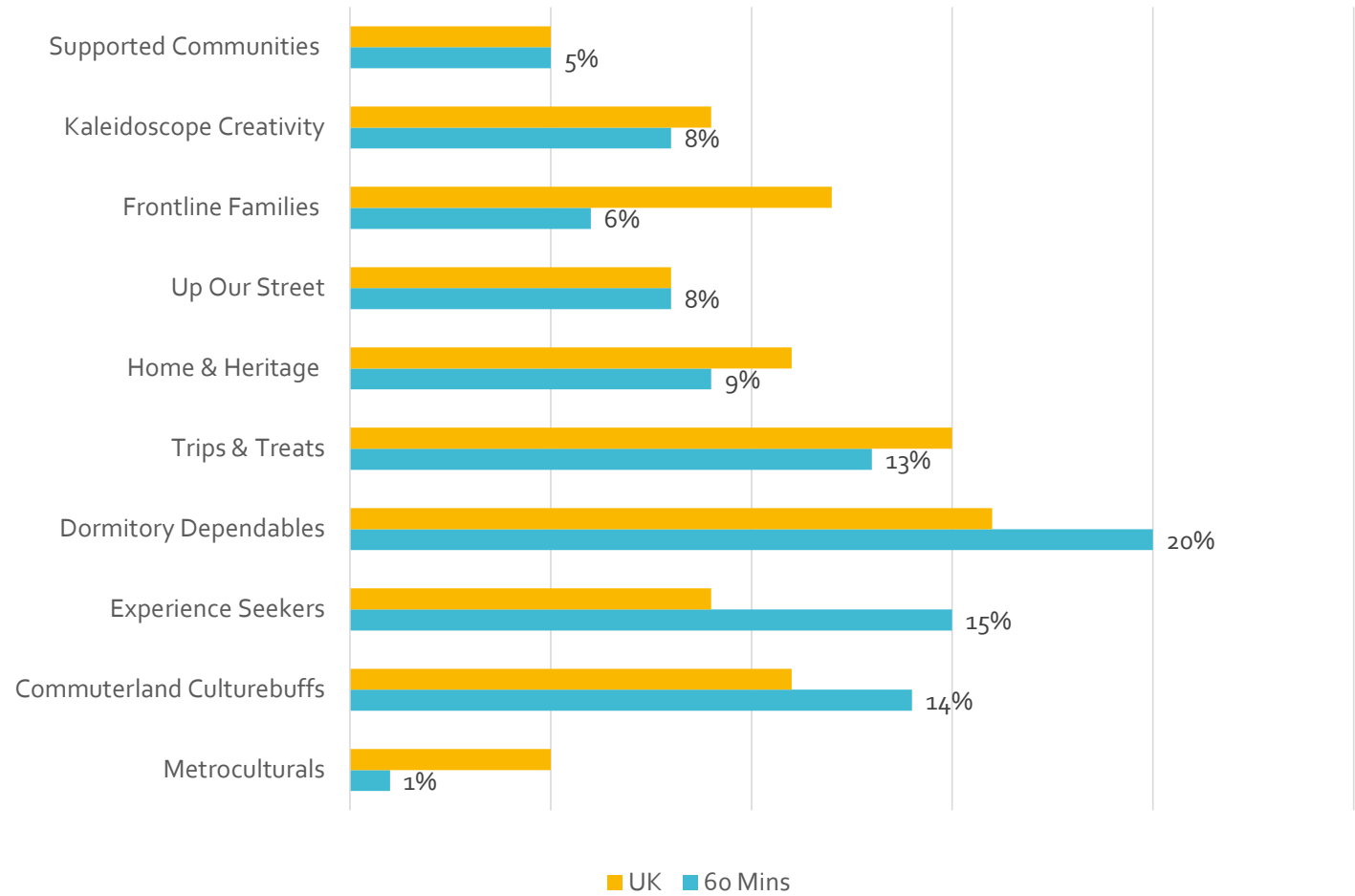
Cultural Attendance: 60 min catchment

- TGI levels of cultural attendance are again higher in the 60 min catchment than the UK average.



Audience Spectrum: 60 min catchment

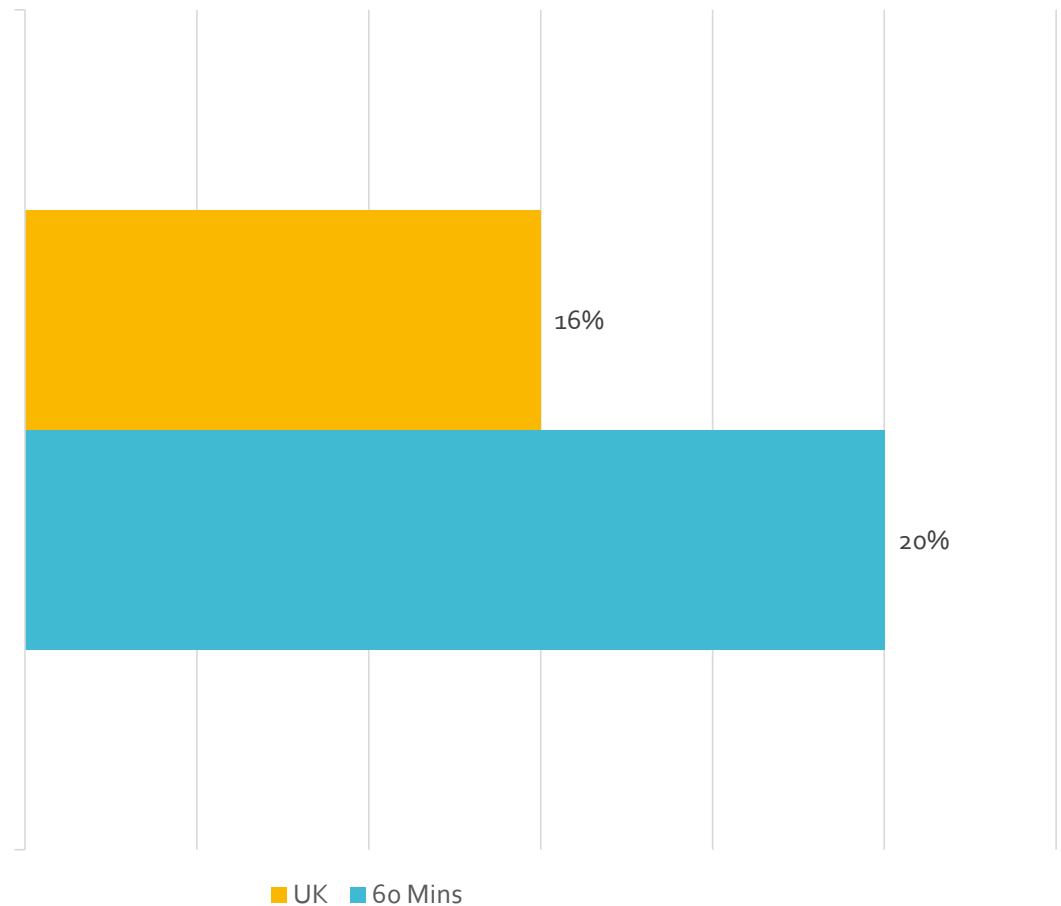
- Highest proportion of population in 60 min catchment are described as Dormitory Dependables, Experience Seekers and Commuterland Culturebuffs.



Audience Spectrum:

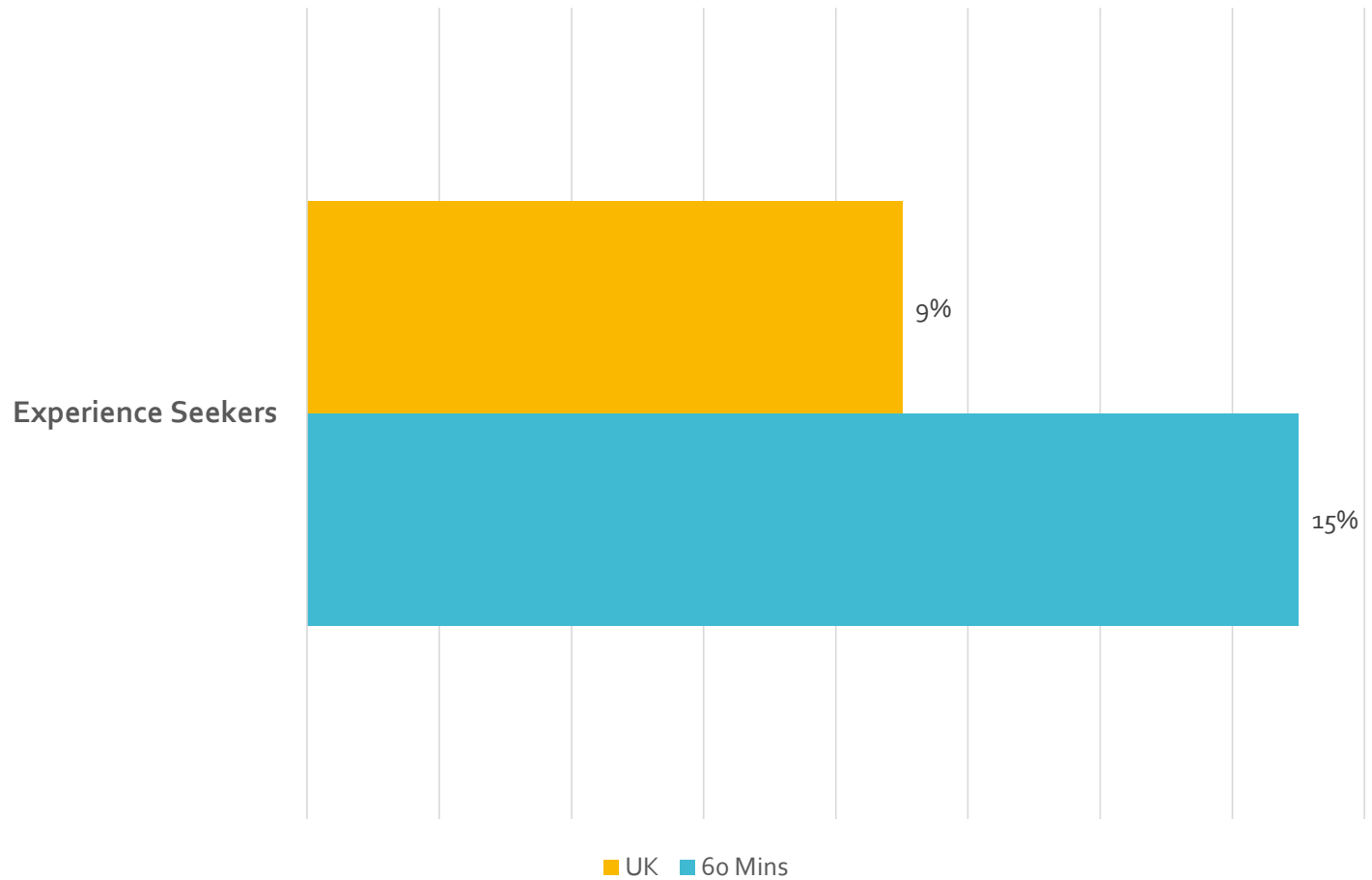
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Dormitory Dependables



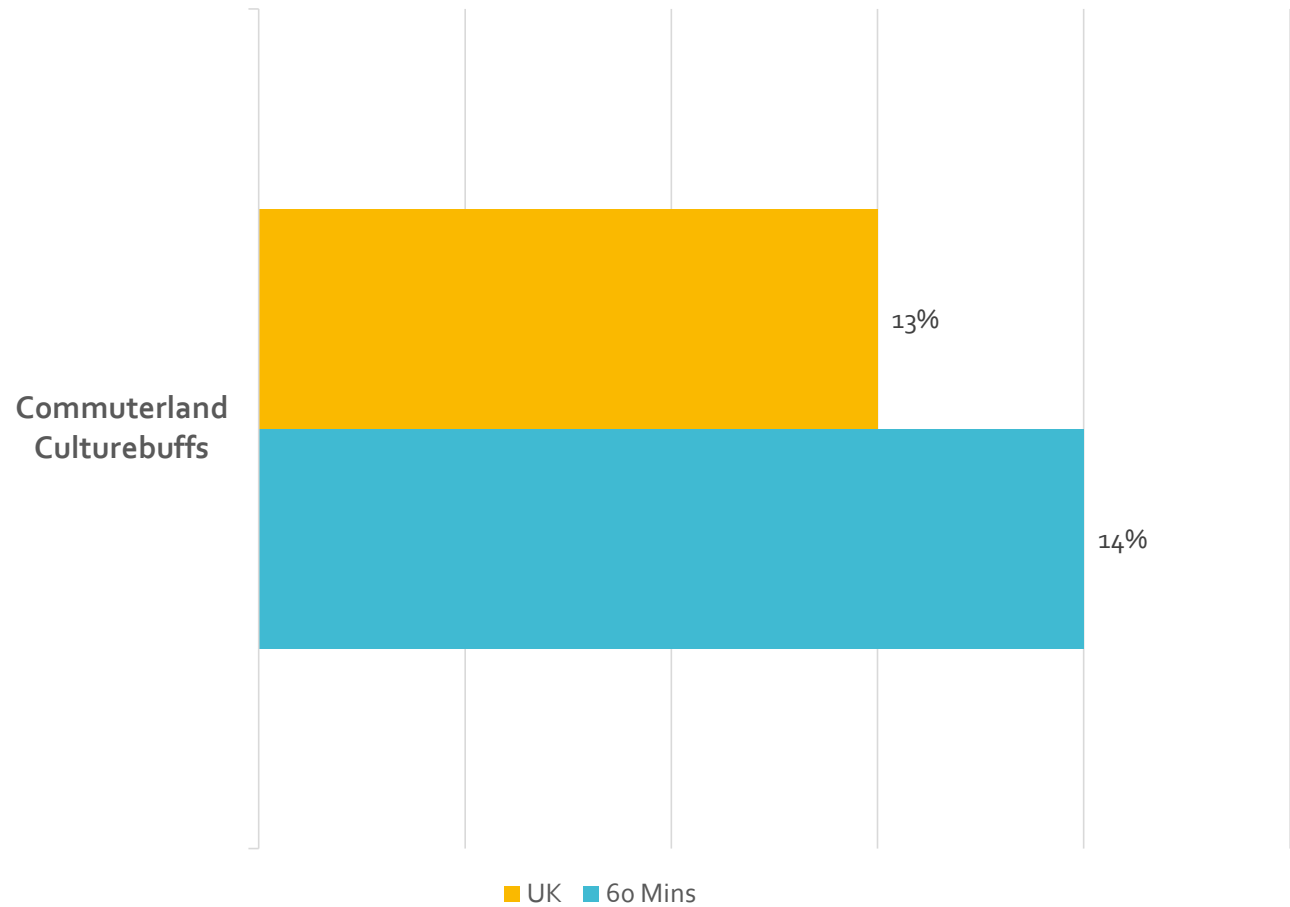
Audience Spectrum

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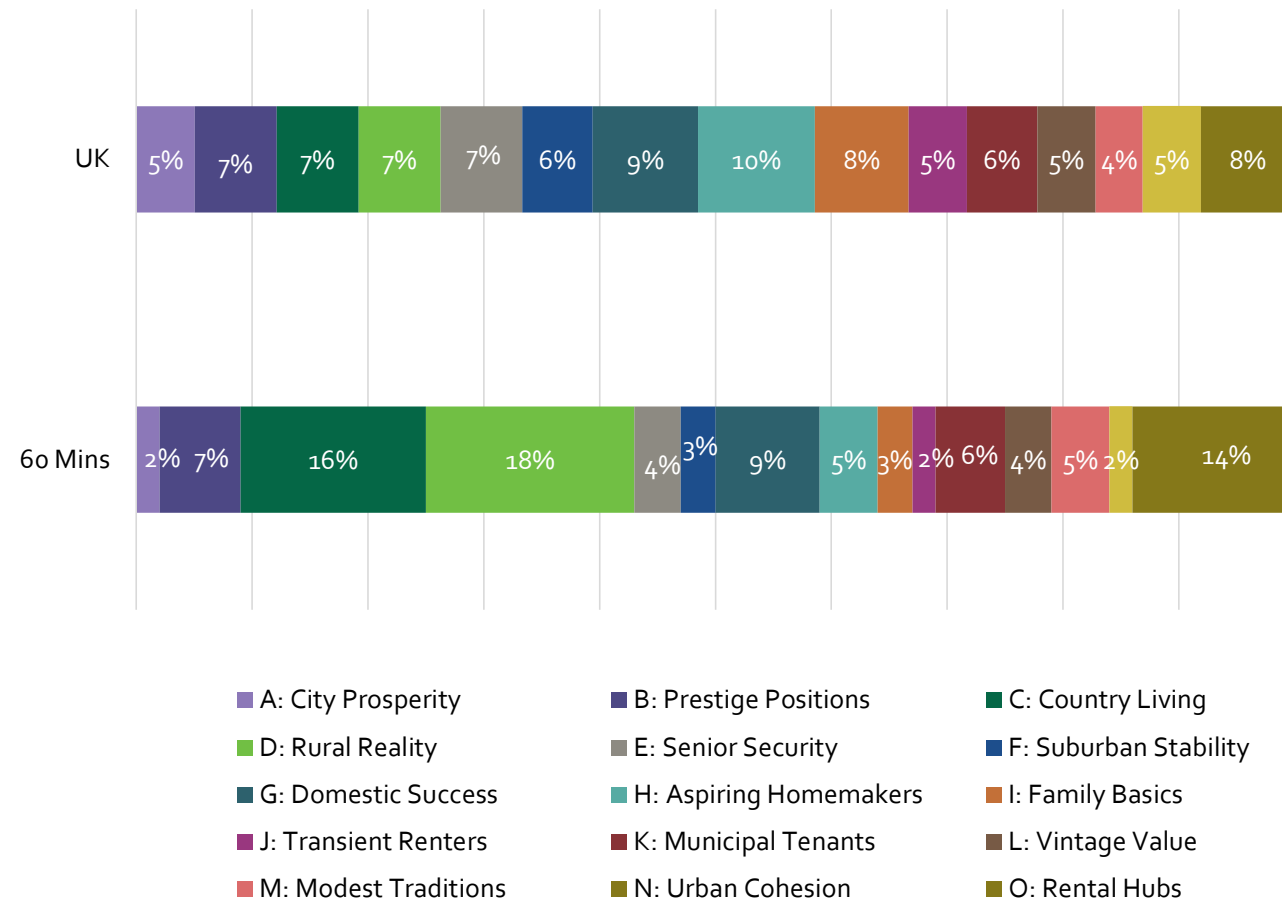
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- They have a considerable disposable income and time to pursue their interests and enjoy leisure activities.
- They are regular attenders and enjoy a variety of artforms.
- They also donate generously.
- They use cultural organisations websites to plan activities.



Mosaic UK: 60 min catchment

Mosaic profile of catchment:

- The catchment profile changes significantly in the 60 minute catchment. This is due to the rural nature of the area relative to the more urban setting of the 30 min catchment.
- The most prevalent groups in the 60 minute catchment are Rural Reality and Country Living, followed by Rental Hubs.



Mosaic: Rural Reality


- Households who live in affordable properties in village and countryside settings.
- Many residents are mature in age but families with children are also included.
- Those of working age are employed in local economy in roles found close to home.
- Live in affordable properties valued below the national average.
- Approx two thirds rent from social or private landlords.
- Cars are a necessity.
- Shops, schools and services can be a considerable drive away.
- Slow internet speeds discourage use of internet for entertainment, but it is used for practical purposes such as bill payments, banking and online shopping to source products not available locally.

D

Rural Reality

Householders living in less expensive homes in village communities

🏠 6.54% | 6.00% 👤



Key Features

- Rural areas
- Oil/solid fuel central heating
- Internet at home
- Free mobile phone apps
- Watch TV
- Comprehensive car insurance


Who We Are

Age	Household income
56–65	£20k–£29,999
135 20.6%	124 24.3%
Household composition	Number of children
Single	No children
103 41.0%	103 70.9%
Tenure	Residency type
Owned	Semi-detached
104 66.6%	130 33.8%







Advert Response Channel

📞	🌐	@
69	112	101
TV	✉️	🛒
63	67	75

Household Technology



Low

Mosaic: Country Living


- Owners of rural homes who enjoy a comfortable lifestyle.
- Many are of an older generation but does include some families.
- Own attractive homes priced well above the average. Mix of traditional and more modern properties.
- Enjoy good incomes and many commute some distance to work or run a small business from home. Those who are retired have a good pension income.
- Cars are essential.
- Internet usage is mixed, but many take advantage of buying products online that are not available locally.
- Residents support local shops.

C

Country Living

Well-off owners in rural locations enjoying the benefits of country life

🏠 6.64% | 6.24% 👤



Who We Are


Age 🎂	Household income 🏠
66+	£70k–£99,999
191 35.2%	176 14.0%
Household composition 👤	Number of children 👨👩👧👦
Family	No children
167 38.2%	111 76.7%
Tenure 🤝	Residency type 🏠
Owned	Detached
131 84.5%	350 64.9%


Advert Response Channel


📞 92	🌐 122	📧 99
📺 147	✉️ 95	🛒 87


Key Features


- Rural locations
- Own old, detached houses
- Electronic money transfers
- Garden or allotment
- Oil central heating
- High environmental impact gap
















Household Technology



Very Low

Mosaic: Rental Hubs


- Young people enjoying city lifestyles in accessible locations.
- Usually aged in their twenties and thirties.
- Many live alone, others share with housemates or partners.
- Most are well educated and have university degrees or are studying for them.
- Accommodation is usually apartments/flats and rented from private landlords.
- Internet is a big part of their lives. Communications revolve around smart phones. They check social media regularly and rely on wireless connections outside of home.
- Consume music and entertainment online.









Rental Hubs

Educated young people privately renting in urban neighbourhoods







🏠 7.75% | 6.51% 👤




Who We Are

Age 	Household income 
26–35	£30k–£39,999
202 39.0%	155 24.8%
Household composition 	Number of children 
Single	No children
142 56.2%	126 87.4%
Tenure 	Residency type 
Rented	Flat
333 59.9%	354 81.9%

Advert Response Channel

 103	 109	 151
 145	 113	 126


Household Technology



Very High

Key Features

- Young singles and homesharers
- Rent flats
- Very high internet use
- Internet via smartphone
- Watch videos online
- Don't use landlines



Mosaic UK
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Modelling Potential Attendance

- Using catchment and local authority data to model likely attendance based on attendance and participation levels
- This figure has been used to provide estimates based on:
 - The local authority population
 - The catchment population

Potential Attendance from within Local Authority:

Potential market is calculated by considering the total population of the local authority.

Using statistics on attendance and participation of likely artforms linked to The Albert Halls potential programming, this is then modelled using the local authority population to provide a potential attendance and participation figure.

Population of **Aberdeen City Local Authority** area (adults):
191,000

Activity	% attendance rate (Household survey)	High propensity potential audience based on local authority population
Cinema	36%	68,760
Live Music	18%	34,380
Theatre	11%	21,010
Street Arts	10%	19,100
Classical Music	2%	3,820
Dance	2%	3,820
Festival	1%	1,910

Potential Attendance from within 30 min catchment:

Potential market is calculated by considering the total population of the catchment.

Using statistics on attendance, this is modelled using the catchment population to provide a potential attendance figure.

Population of 30 min catchment area:
(adults)
261,559

Activity	% attendance rate (TGI)	High propensity potential audience based on catchment population
Cinema	74%	193,554
Pop/rock concert	48%	125,548
Theatre	48%	125,548
Plays	38%	99,392
Musicals	38%	99,392
Comedy	38%	99,392
Classical Music	19%	49,696
Ballet	18%	47,081
Opera	18%	47,081
Jazz	17%	44,465
Dance	16%	41,849

Potential Attendance from within 60 min catchment:

Potential market is calculated by considering the total population of the catchment.

Using statistics on attendance, this is modelled using the catchment population to provide a potential attendance figure.

Population of **60 min** catchment area:
(adults)
398,282

Activity	% attendance rate (TGI)	High propensity potential audience based on catchment population
Cinema	71%	282,780
Pop/rock concert	46%	183,210
Theatre	46%	183,210
Plays	36%	143,382
Musicals	36%	143,382
Comedy	36%	143,382
Classical Music	17%	67,707
Ballet	16%	63,725
Opera	16%	63,725
Jazz	15%	59,742
Dance	14%	55,759

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