



LONDON CITIZENS

...understanding Londoners

Using London's unique culture to your advantage

Applying the segmentation to identify potential and drive business growth

Understanding Londoners...

With constant property developments changing the capital's skyline and shifts in population from emigration and immigration, London's communities and consumers are in a marketplace of their own.

As well as its landmarks and diverse culture, London is famous for being a city of "villages". There is no one definition of a Londoner, with stark differences from neighbourhood to neighbourhood making the capital unique.

Being able to understand Londoners is key to any organisation looking to engage with the city's occupants.

What is London Citizens?

Marketing Metrix has created London Citizens to harness the vast amounts of information surrounding the city and its population.

London Citizens is a segmentation that splits the capital into 10 groups and 34 sub-groups.

The tool can be used to improve recruitment strategies, as well as for targeting and developing existing relationships with London's consumers and communities.

Who can use London Citizens?

This tool can be used across a variety of sectors, essentially any business that wants to deliver a product or service to London's communities and consumers.

This covers, but is not limited to, many types of organisations: stores, supermarkets, financial services, luxury brands, government organisations, night clubs, charities, hotels, restaurants, exhibitions and conferences etc.

It is particular useful for identifying and engaging with exclusive groups of people and specific types of areas within London.



What can it be used for?

Segmenting your customer database using London Citizens will allow you to determine significant demographic, social, behavioural and attitudinal factors. The insight gained can assist with managing and developing customer relationships to increase response, value and retention.

The tool can also be used for finding and recruiting new customers by identifying specific areas and households with the most potential. By considering both value and responsiveness, London Citizens helps you to

reach the right people in the right way to maximise campaign ROIs.

Using London Citizens to develop highly targeted advertising campaigns will increase responsiveness. Localising your advertising using the segmentation is an intelligent yet simple way of using vast amounts of data and insights to increase your bottom line.

London Citizens can be used to identify the best areas for new store locations. Analysing the demand by local area and mapping out where your current customers

Gather allows organisations to identify gaps in the market and growth potential.

The segmentation can be used to enhance research analysis, both qualitative and quantitative. Segmenting research respondents using London Citizens provides additional insights into why a particular group of respondents answer in a particular way. It also will reveal if there are any trends or response patterns across the cities population. London Citizens can facilitate government decisions by providing insight surrounding specific London boroughs and other local areas. The segmentation can be used to identify patterns of social behaviour such as crime, unemployment rates and council rented properties.



For new or established companies wishing to set up in the capital for the first time, London Citizens can provide the intelligence

needed to resolve important business decisions. This tool allows organisations to detect the best areas to set up shop's and

how to engage with London's unique marketplace.

A silhouette of the London skyline is overlaid on a photograph of modern buildings. The skyline includes the Tower Bridge on the left, the Gherkin in the center, and various other skyscrapers on the right. The background photograph shows a clear blue sky and the upper parts of several modern, multi-story buildings with windows.

LONDON CITIZENS

Socially Strapped

1. Socially Strapped

37% of London Households

Lowest social demographic group

Most ethnically diverse

Least financially stable

Large families and social renters

Highest level of dependent children



1. Socially Strapped

37% of London Households

The lowest social demographic group with a high level of ethnic diversity

Containing by far the largest volume of council or social renters – at 44% of the segment – these residents are limited to the aging tower blocks that populate London’s skyline, with few small, terraced houses to accommodate the larger families.

The average house price of these properties is the second-lowest in all London, trumped only by the *Stretched and Skirting* who, as homeowners, are considered much more financially stable.

Strapped for cash, these residents are a generation of young adults of varying ethnicities – often starting families – that are struggling to find their feet.

As the most likely segment to have dependent children, they have an increased monetary responsibility but sporting a population of routine, menial workers, along with the highest employment level in the capital, makes meeting this responsibility almost impossible.

A high proportion of single adults, and consequently single parents, stacks the odds even further against them.

The *Socially Strapped* are traditional of the likes of south London’s Peckham, and Newham over in the east.

With little to no disposable income, these residents are well placed in areas saturated with low-ranked schools and downmarket retailers, and utilise local high-streets that are populated with independent stores and services with discount prices, catering for all ethnic communities.

Access to the city is more convenient for them by rail, as opposed to TfL’s London Underground, with a lack of tube stations in their vicinity, another characteristic of South and East London.





LONDON CITIZENS

Stretched & Skirting

2. Stretched & Skirting

18% of London Households

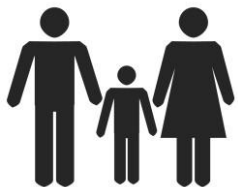
Living in the outskirts of London

Ethnically diverse

Lower occupation levels

High levels of unemployment

Low qualification levels



2. Stretched & Skirting

18% of London Households

A Walford-esque community of families in difficult circumstances

The *Stretched & Skirting* are exactly that; financially stretched and living in semidetached or terraced houses on the outskirts of London (travel zones 3-5). Almost half of these residents are homeowners, the purchase and commitment leaving them cash poor.

They are only able to consider living in neighbourhoods with low average house prices on the outskirts of the capital. Those who aren't homeowners are most commonly renting social housing, which reflects their difficult economic circumstances. These areas are often not conveniently serviced by London's tube or

rail network, making at least one car a burden but a necessity.

These residents are of all ages, with a high proportion of the young and a spike between the ages of 40 and 60, suggesting the parents of dependent, often teenage, children. With ethnic diversity almost at a London high in this segment, these married families experience a wide variety of different cultures on their doorstep, as well as in local stores and amenities.

The lowest higher education levels in all of London can be found in these neighbourhoods, and consequently the

workforce find themselves in intermediate to lower positions in midsize companies.

Further afield than many other segments, and therefore further from the convenience London has to offer, the *Stretched & Skirting* find themselves far from chain stores and most services. Far from London's unique department stores and vast shopping centres, they must travel into the City for anything on this scale.

However, the establishments in their area are on the whole downmarket, which is a necessity, considering their financial hardship.





LONDON CITIZENS

ShelteredSheilas

3. Sheltered Sheilas

2% of London Households

Living all over London

Older, widowed and living alone

Social renters generally in flats

Highest proportion with no qualifications

Often found in their local GP



3. Sheltered Sheilas

2% of London Households

Veteran Londoners in social housing, often with a 60-plus Oyster card

Many of London's older population can be found in the *Sheltered Sheilas*. With age not on their side, leaving many in poor health and in need of care, socially rented sheltered accommodation blocks cater for most of their increasing needs.

Often, however, this type of supported housing can come with high rent, leaving many of these residents in less than desirable financial situations. As they are understandably the least likely London segment to own a car, they keep company with one another to avoid loneliness.

With an average age of 45+, these residents have a lot of life experience, and many are

already elderly. This unfortunately comes hand in hand with their propensity to live alone, and the significant proportion of singles and widow(er)s.

Having worked most of their lives, many are enjoying a well-earned retirement, but those more able to work and still in employment are in intermediate or lower occupations.

Being born in a different generation, there were often different expectations and attitudes to academia and further education was a rare choice, possibly explaining why they are the most likely *The Sheltered Sheilas* find home in London's inner travel zones, surrounded by London Underground

and rail stations, so those more mobile can have easy access to the City. However, some are unable to travel long distances, so their sheltered accommodation must be in close proximity to local amenities and stores.

They often enjoy to several of London's famous art galleries and museums, many of which offer discounted entry or membership to senior citizens. There is also a high density of GP surgeries and walk-in centres in these areas, serving those with poor health to avoid them putting strain on busier hospitals like St.

Bart's.





LONDON CITIZENS

Midlife Mortgages

4. Midlife Mortgages

9% of London Households

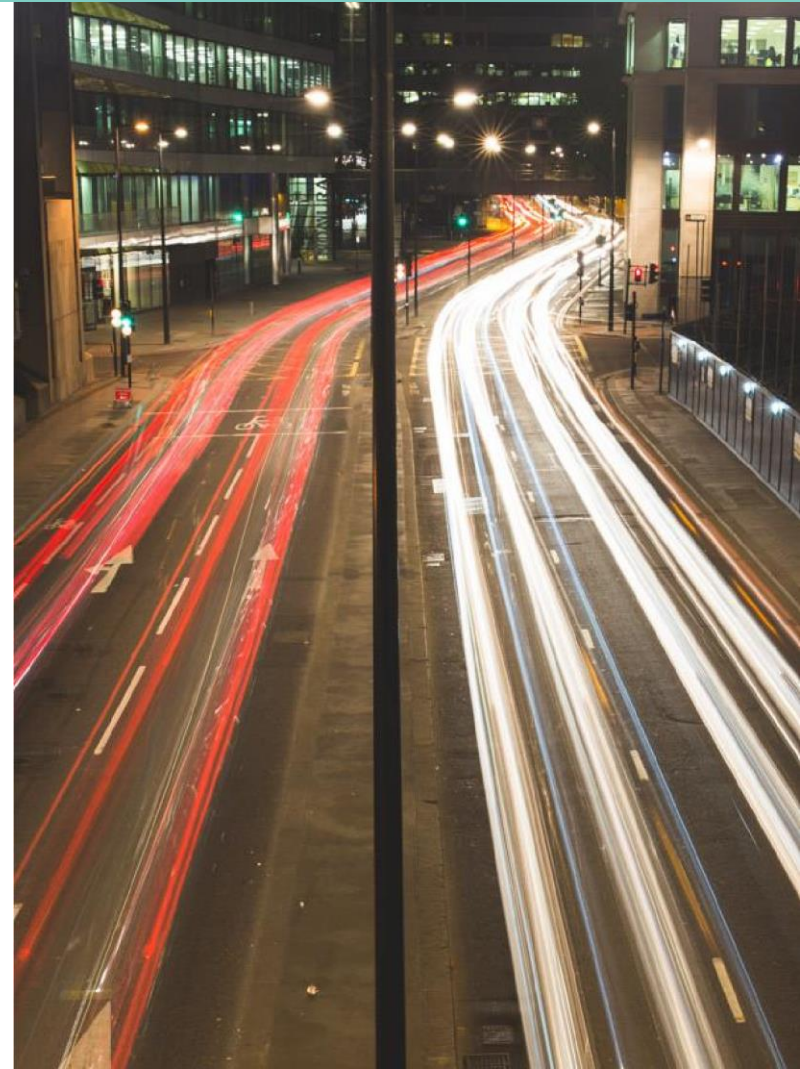
Living in the outskirts of London

Typical British nuclear families

Middle-aged homeowners with a mortgage

Professionals with degrees

With dependent children



4. Midlife Mortgages

9% of London Households

Middle-aged, managing families occupying London's commuter belt

The *Midlife Mortgages* are a population of typical managing families that are remarkably similar to those found all across the country; they are Londoners by location rather than nature, and are utterly suburban.

Populating much of Barnet and Enfield, these home-owners are almost middle class and are of emerging social status, living in mid-size houses and faring relatively well whilst still under some of the financial demands of the capital. In these neighbourhoods, where public transport

consists of scheduled busses and trains, at least one car is essential for a busy family.

These residents define middle-aged, with most adults falling between the ages of 35 and 65.

Many have settled happily in to marriage – whilst others are awaiting their big day – and often have multiple dependent children to support. This is made easier for the majority as a degree level education allows them to work in intermediate or higher occupations, mainly in professional industries such as education or IT.

With their dependent children a top priority in the lives of the *Midlife Mortgages*, it is of no surprise that they live in catchment areas of the top state schools in their vicinity, to secure a good education for their families.

However, living on the outskirts of London means that they have to travel in order to enjoy many of the establishments that are characteristic to the capital, such as top restaurants, West End theatres, boutique shops and vast department stores.



A silhouette of the London skyline, including the Tower Bridge, St Paul's Cathedral, and the Gherkin, set against a background of a modern glass skyscraper and a cloudy sky.

LONDON CITIZENS

Inner City Singles

5. Inner City Singles

16% of London Households

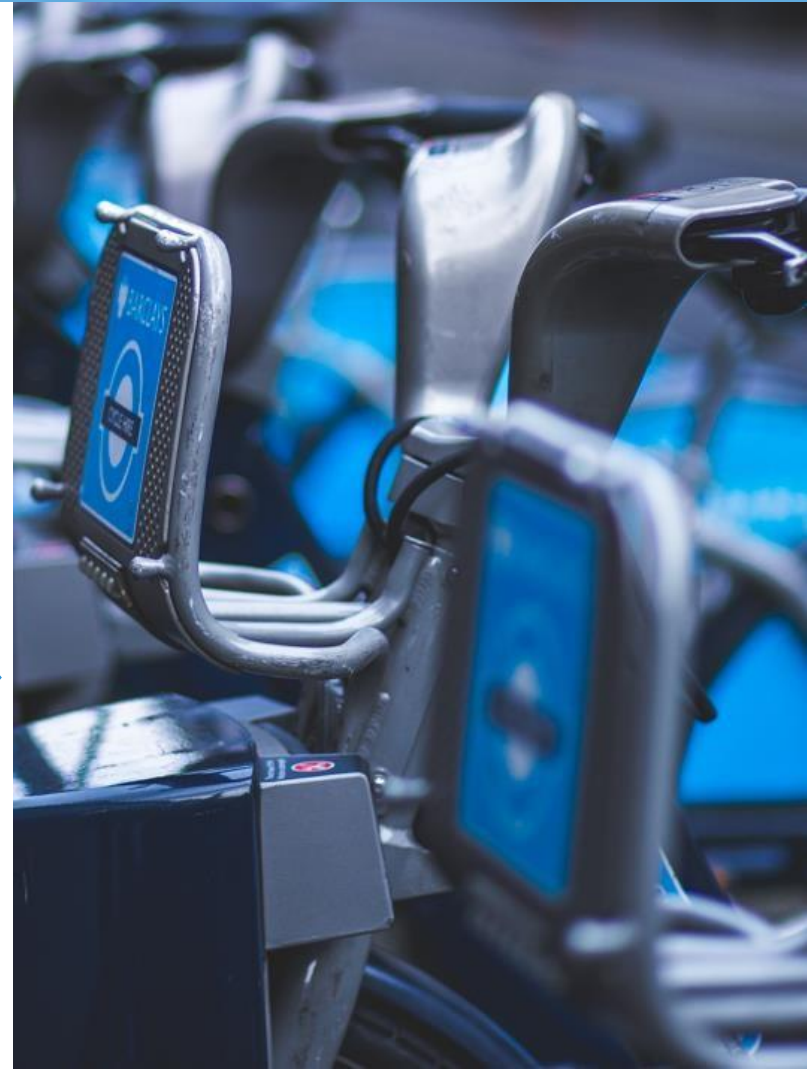
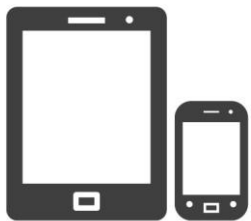
Young, single adults in inner London

Private renters of flats

Sophisticated professionals

Generally educated to degree level

Often working in finance e.g. Canary Wharf



5. Inner City Singles

16% of London Households

Sophisticated young professionals, often privately renting flats

As London's single and career-driven professionals, living close to the heart of the capital, the *Inner City Singles* are immersed in urban life. Their modern, minimalist apartment blocks, that have been purpose-built for the needs of this group in particular, are becoming a comfortable and convenient addition to London's skyline.

They are the most likely segment to privately rent, not yet ready to commit to buying a property or, in the case of the younger residents, often unable to save enough for a deposit on a flat of their current standard.

These residents are predominantly young adults, from 21 to 40, and are the least likely segment to have dependent children, avoiding any considered distraction from their career development. This trait means they often also live alone, but the remainder tend to cohabit with their significant other. Degree-level education is often compulsory for their intermediate to higher occupations, with many working their way up in the finance industry.

Living in close proximity to many Zone 1 Underground stations allows the *Inner City*

Singles to commute all over the capital for their demanding careers, however most of their employers congregate in the City or Canary Wharf.

With busy lifestyles, convenience is of the utmost importance to these residents, therefore these neighbourhoods are populated with chain stores opening long hours. Also close to low-ranked schools, they don't choose their location on educational prospects for future children but for absorption in city life, and several overlook the Shard from their apartment windows.





LONDON CITIZENS

Educated & Graduated

6. Educated & Graduated

2% of London Households

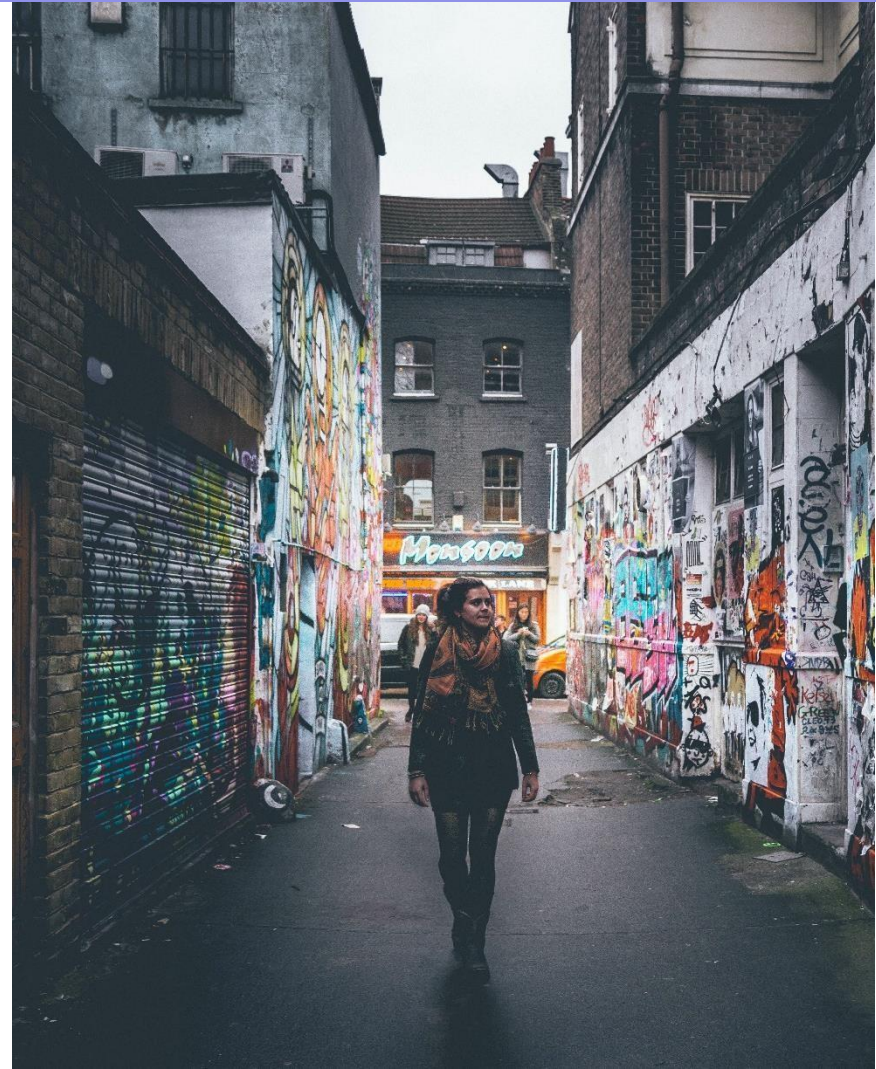
Full-time students and recent graduates

Private renters

Often in communal flats with flatmates

Studying for their degree

Young, single adults in inner London



6. Educated & Graduated 2% of London Households

Students and recent graduates of the University of London, often in house-shares

Students at the Universities of London, of Westminster or City University, and recent professional graduates, make up the *Educated & Graduated*; living in and around central London.

Almost exclusively renting purpose-built apartment blocks, often in large communal flats and University 'halls', these residents live in high value properties only due to house-sharing, which is typical of this age-group. With often unstable financial situations, and living in areas with an abundance of convenient public transport and many amenities in walking distance, they are the least likely segment to invest in a car.

As young adults, generally in their 20s, these residents are the most likely to be single, with years still ahead of them to settle down.

Students travel from all over the world to study at some of London's world-class institutions, so it is of no surprise that this segment is ethnically diverse. The full time students often take part-time jobs in the service industry in order to supplement their lifestyles.

The *Educated & Graduated* live predominantly in travel zone 1, in order to maintain convenient access to their various university campuses across the capital.

These areas are saturated with museums, art galleries and theatres which caters for their high cultural capital, but also with a variety of different grocery shops and convenience stores which allows them to shop with any brand depending on their, often tight, budget.

The closest segment to London

Underground and rail stations, they enjoy exploring the city and rely heavily on the public transport system to get to and from events, parties and dinners with

friends .





LONDON CITIZENS

Peripheral & Prosperous

7. Peripheral & Prosperous 5% of London Households

All over London including the peripherals

Older, married residents

Most likely to be homeowners

Multiple cars per household

Higher level occupations e.g. Managers



7. Peripheral & Prosperous

5% of London Households

Middle-class families with busy schedules and a love of Peter Jones

The *Peripheral & Prosperous* have spent their lives working for a comfortable life, and have generally achieved it. With the highest proportion of homeowners in all of London, they tend to buy comfortable, family, detached or semi-detached homes with plush interiors, and furnish them with the latest gadgets. Their houses however usually have very disparate prices, due to their varying locations.

A little extra disposable income allows them to purchase one, if not multiple, car, which makes life much easier for the high proportion living in travel zones 3 to 5,

where public transport is less frequent and less conveniently placed.

These residents are usually over the age of 40, having taken their young adulthood to attain such an affluent and stable position. They tend to be married, and often their children have already flown the nest, however those with remaining dependants generally have two teenagers.

Educated to degree level to facilitate their intermediate to higher occupations, many commute into the City for their professional careers.

With many living on London's boundaries, the *Peripheral & Prosperous* are further from most amenities than the rest of the segments. However, those with dependent children see them in high-ranked state schools, choosing their location carefully to be in the catchment area of top institutions.

Their well-established financial stability makes a healthy lifestyle much easier for these residents, with a little extra disposable income to spend on organic produce and health foods, as well as a membership to one of the many local health clubs.





LONDON CITIZENS

The Good Life

8. The Good Life

9% of London Households

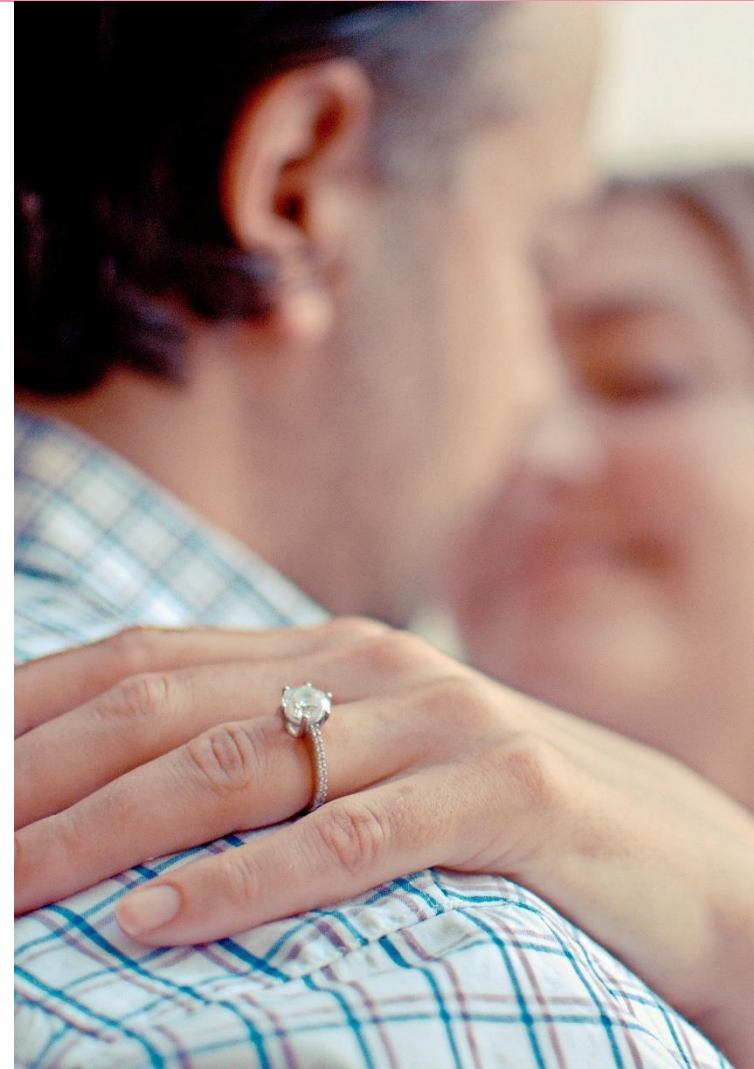
Scattered across mainly West London

Married, homeowners and Waitrose lovers

Most likely to have high level occupations

Professionals and ex-professionals

Very few with dependent children



8. The Good Life

9% of London Households

Loyal Waitrose shoppers normally found in West London

London's upper-middle class, prominent in areas such as Richmond, Wandsworth and St. John's Wood, are found in *The Good Life*. Choosing to buy upmarket, spacious terraced houses in sought – after neighbourhoods, they have the financial cushion to live extremely comfortably.

With properties worth well over one million on average, these houses are furnished elegantly, in keeping with their styled and desirable lifestyles. Although often unnecessary due to their central location, these residents tend to own one or two luxury cars – Mercedes Benz or BMW –

preferring to drive around the capital than use public transport.

Married, but usually without any still dependent children, these affluent individuals are mostly aged 35+, and are in the prime of their working lives.

A senior, professional position in a successful company is generally required to reach such a level of social status and financial stability, therefore it is unsurprising to find that these are the most likely in London to have a higher occupation, and the majority are educated to degree level. This is reiterated

by their prominent presence in employment in the finance and insurance industries.

The Good Life are scattered all over London, in pockets of luxury throughout the capital. However, due to their wealthy reputation, they are generally always in the vicinity of the same retailers and amenities, such as art galleries, Majestic Wine stores and upmarket groceries stores, such as Waitrose.

These areas also host many of London's top restaurants – such as Scott's London and Le Gavroche – at which they can sample some of the best food and drink in the capital, among similarly affluent company.





LONDON CITIZENS

London Elites

9. London Elites

1% of London Households

Older inner London city dwellers

Married homeowners

Living in lavish houses

Most likely to be white

Multiple cars per household



9. London Elites

1% of London Households

Ex-Sloane Rangers, still living the life but kicked out of Kensington

Up until about 15 years ago, *London Elites* would have been the wealthiest segment in the City, however they have now been surpassed by the

Transnationals (see overleaf).

Typically they can be found in areas such as Chelsea; with an average house price in excess of three million, these wealthy individuals are head and shoulders above the rest of London. When younger many of this segment would have been known as Sloane Rangers however, now older, they are well established and, other than the

Transnationals, have the highest household income.

With an over 40, married population, this segment has the lowest proportion of residents from an ethnic minority, and they are very wealthy, with some of the best longevity in the UK.

This wealth has been developed from years of working in professional industries, namely finance, and therefore most are educated to degree level, in order to gain a foothold in this world and advance so high in their respective companies.

With one of the highest proportion of top jobs and few dependent children, the *London Elites* have chosen to spend some of their success buying or renting large houses amid the top-ranked state schools, museums and galleries and Underground stations, to leave the city at the palm of their hands.

They enjoy winter sports and eating out at good restaurants, with access to some of the best restaurants in London, often Zuma and Restaurant Gordon Ramsey. With a selection of health clubs on their door steps, this enables them to keep fit for their annual ski trips.





LONDON CITIZENS

Transnationals

10. Transnationals

0.3% of London Households

Mayfair, Knightsbridge & Belgravia...

... And homes around the world

Large houses and penthouses

Own supercars with chauffeurs

Entrepreneurs typically within finance

Often have private chefs at home



10. Transnationals

0.3% of London Households

Luxury homes and supercars in London's prime locations, they live the jet-set life

Of all the international billionaires who have houses in London, most are cited in the *Transnationals* segment. With homes across the world, it is cities – not countries – that matter to these residents. Most live in Mayfair, Belgravia or Knightsbridge, with an average house worth over £7 million, and many way over that. The jewels in the crown are One Hyde Park and Kensington Palace Gardens, where residents almost certainly have a personal wealth in the tens and hundreds of millions.

Sporting the highest proportion of detached housing, and of outright ownership, the remainder rent their very expensive houses country, leaving their home 'dark'.

and apartments, yet all will spend lots of time out of the In terms of nationality, many from Russia, the Middle East, China and countries across Europe, buy in these neighbourhoods, looking for a safe investment.

Understandably these residents enjoy the best health in the capital, with most eschewing the NHS for private medical treatment.

Travel for this group may include chauffer driven car, first class flights or preferably private jets to get them between their various homes across the globe.

Supercars dominate these areas, with Aston Martins and Ferraris being relatively common place on the streets.

They predictably live close to some of the best restaurants and hotels in London, and close to some of the most exclusive shops in the world.

Although living close to top state schools, most will privately educate their children at the likes of Hill House School, especially at secondary school, and they will use very few, if any, state or council amenities.



