



# Who will our audiences be?

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[theaudienceagency.org](https://theaudienceagency.org)

[audiencefinder.org](https://audiencefinder.org)



# Outline

What your data is telling us: audiences now?

What the trends say?

How is society changing?

Winners and losers?

[theaudienceagency.org](http://theaudienceagency.org)

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# The Audience Agency: co-operative, give-and-gain model



# Audience Finder

Free to all, pooling market intelligence to find out

- who comes
- who doesn't
- who might

To you, to the sector



audience  
finder

# THANK YOU!

- 210 venues sharing ticketing data
- 300 using a standard survey
- 100,000,000 ticket threshold
- 10.6 million households (/23 million)



# Audience Finder: “big data” patterns emerging



What if...

we could predict what sort of an audience we might get for a show?

we could predict best approach to reaching non-attenders?



audience  
finder

- What % of all English households attend theatre\*?  
**40% (est)**
- What % at least two a year?  
**15% (est)**
- What do audiences think of theatre?  
**Lowest “recommend score”**
- What are they like?...



# audience spectrum

Not everyone is the same,  
we don't all want the same things

A population segmentation =  
10 distinct profiles, linked to household and postcode.

Helps us understand spectrum of audiences,  
plan to meet needs, and find new ones.





Metroculturals



Commuterland  
Culturebuffs



Experience  
Seekers



Dormitory  
Dependables



Trips & Treats

## Three Highly Engaged Groups

Home & Heritage

- 22% population, 60% of audiences
- Confident, enthusiastic, educated
- Habits and tastes vary



Facebook  
Families



Kaleidoscope  
Creativity



Heydays



Metroculturals



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Home &  
Heritage

## Three Medium Engaged

- 41% population, 30% of auds
- Risk-averse, not culture-averse
- Location and lifestage critical

Facebook  
Families



Kaleid  
Creativity



Heydays

# Four Less Engaged Groups

- 37% population, 10% of audiences
- Do engage, but low proportions
- Lack of interest AND resources

Metroculturals

Commuterland  
Culturebuffs

Trips & Treats

Home &  
Heritage

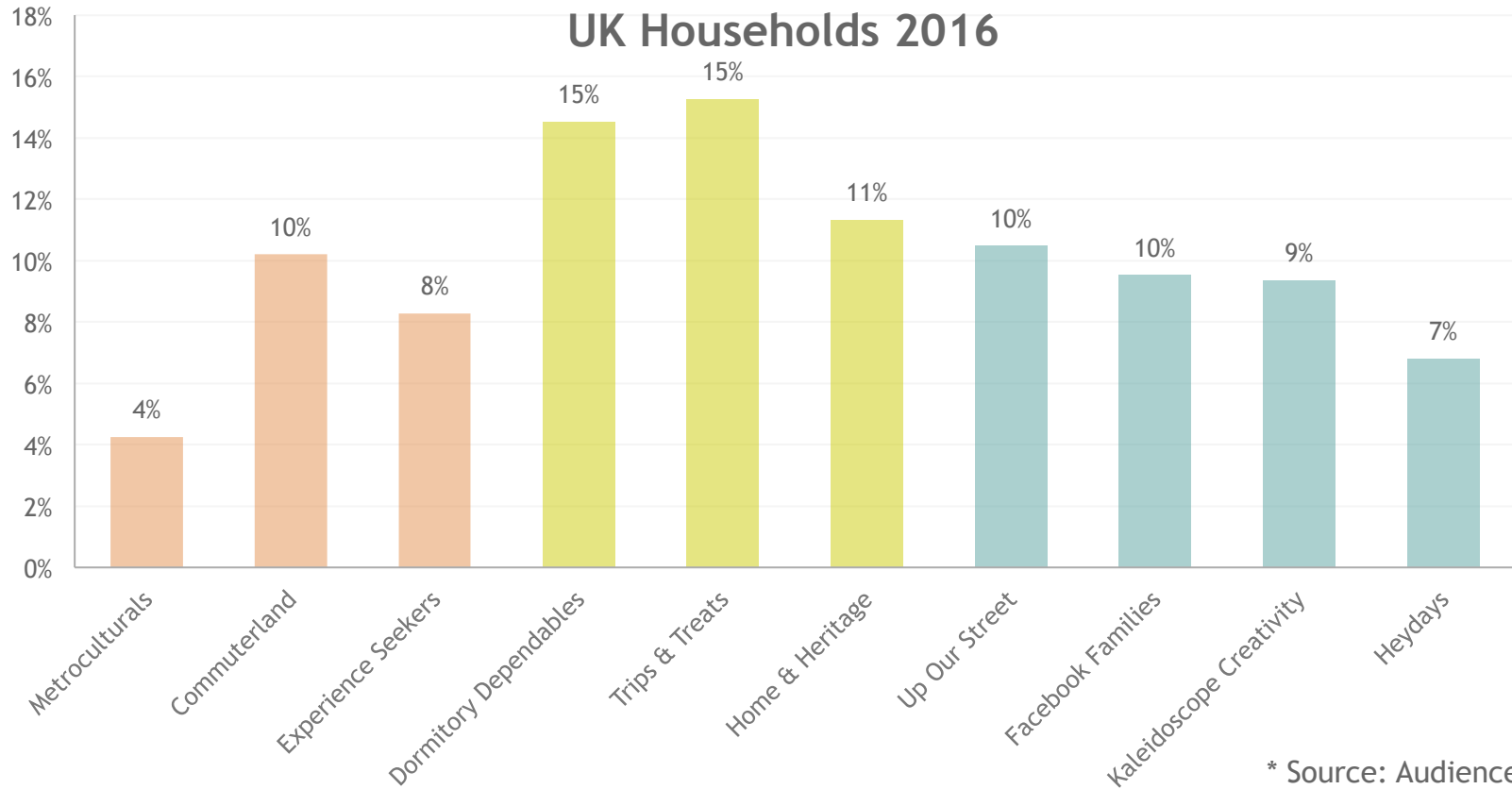
Up Our Street

Facebook  
Families

Kaleidoscope  
Creativity

Heydays

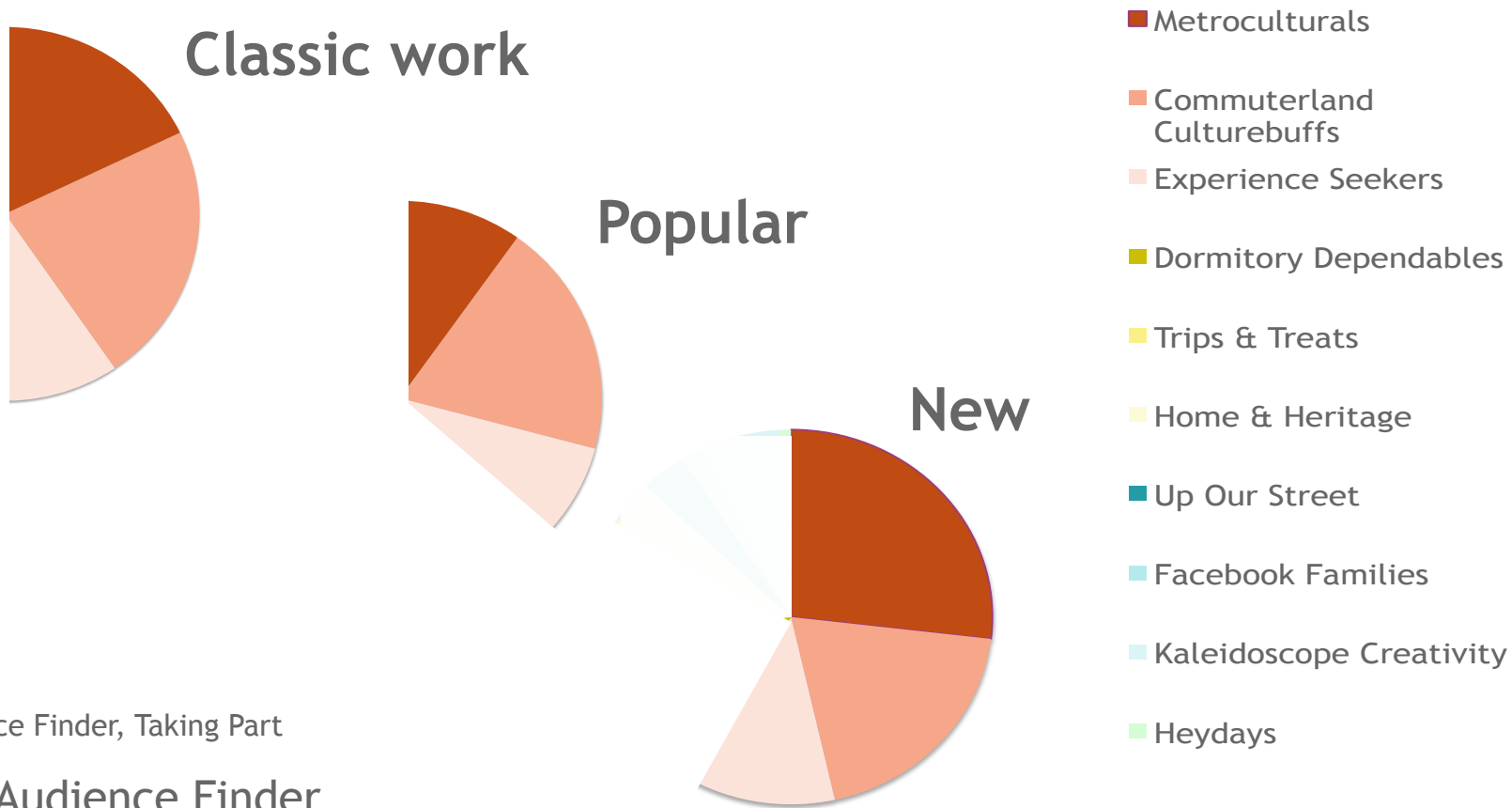
# Theatre-goers v population



\* Source: Audience Finder

- What % “highly engaged” theatre audiences?  
**54%**
- Largest age-group among theatre audiences  
**65-74 (average age 52)**
- Most significant marker of engagement?  
**Education**
- How far do profiles for different types of work?

# How different are audiences for different work?

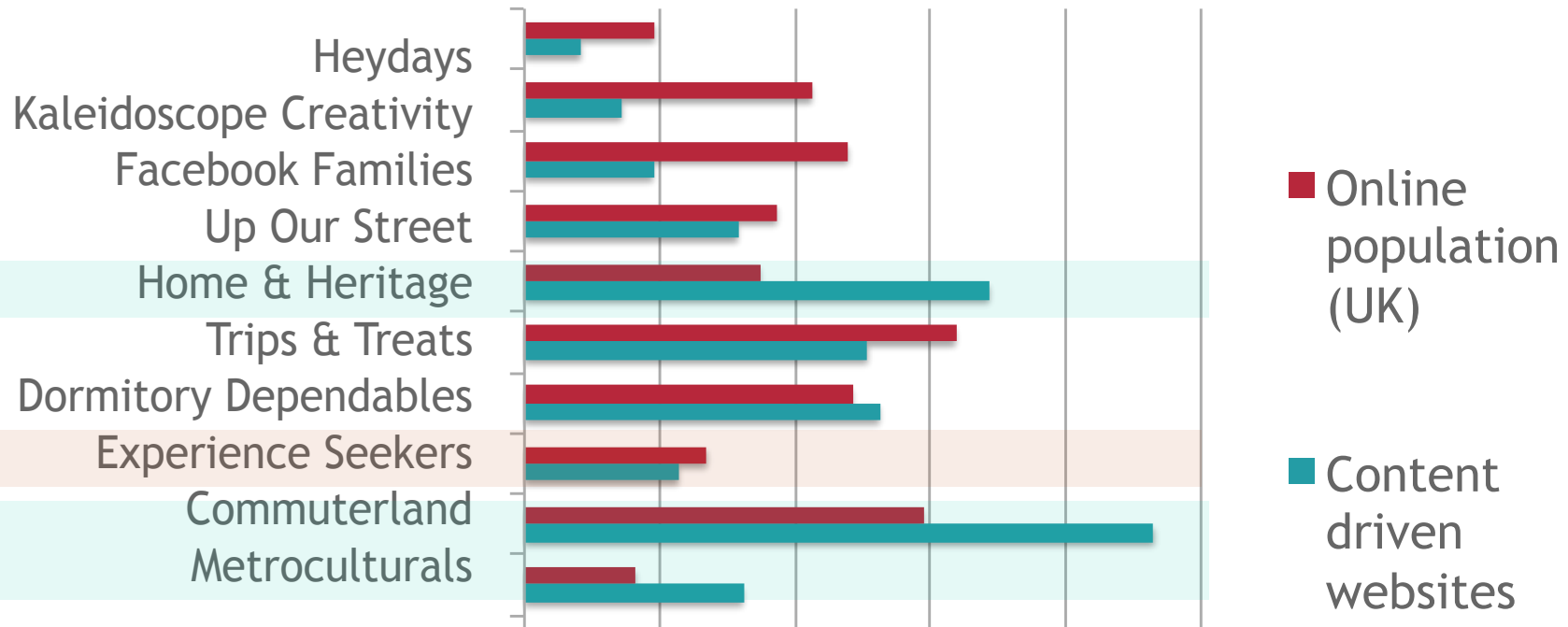


\* Source: Audience Finder, Taking Part

\* Source: Audience Finder

# Use online theatre content (mash-up)

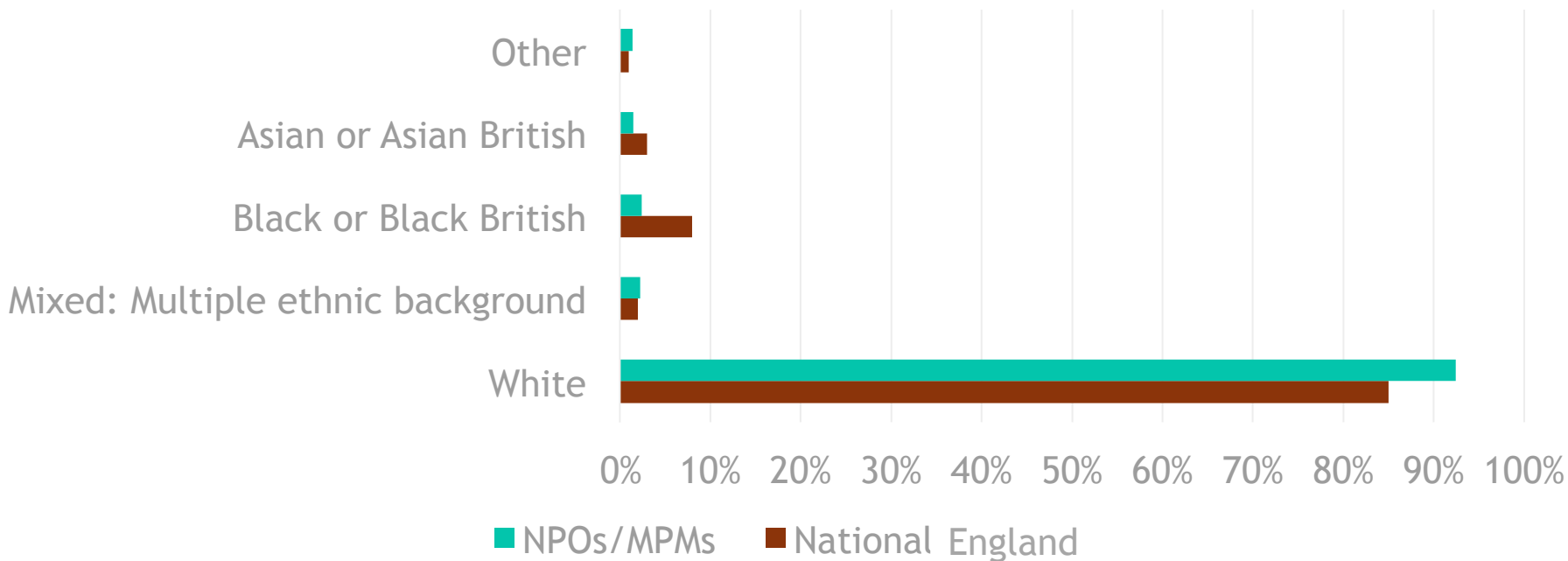
Core audiences, also older audiences further away from venues, not doing well with younger audiences



# How ethnically diverse?

All ACE NPOs

lower for theatre, a slight downward trend



\* Source: Audience Finder, National Survey



# What we do and how we do it?

Can what we do and how we do it develop a more diverse audience?

- Catchment area: 75% of audience is distributed
- How far does catchment determine audiences?
- Average penetration index:
  - High: 164                      Medium: 107                      Low: 49
- But there are significant variations...

High: 100

Medium: 109

Low: 84

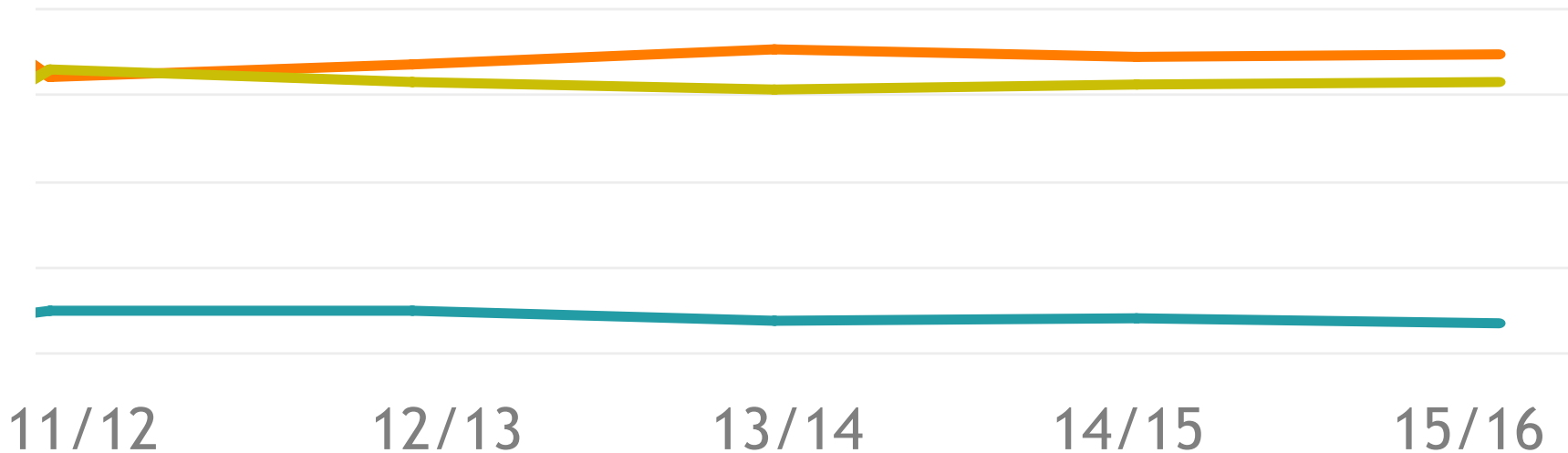


Liverpool Everyman & Playhouse  
bucking the trend...

- Trends to date
- Not much change
- How are audience profiles changing?
- Are theatre audiences growing or shrinking?

# Changes in profile over 5 years

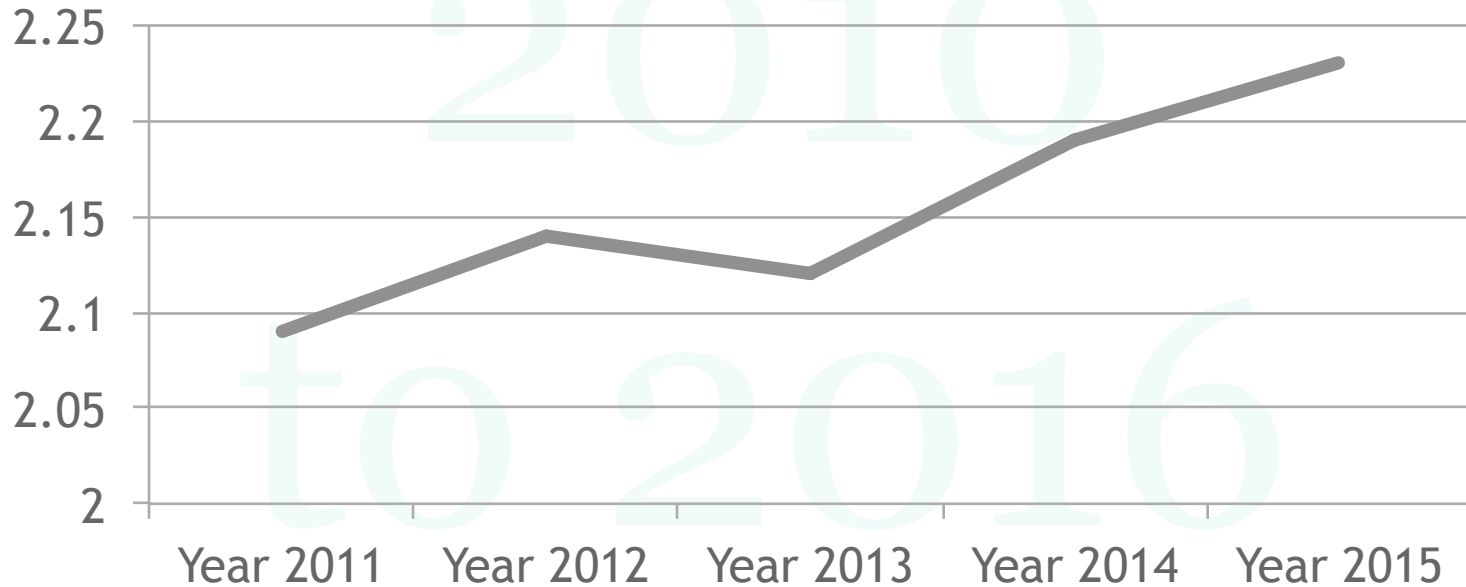
Slight rise in higher engaged groups:  
Reflects increases in frequency?



# Changes in frequency of visits?

Overall improvement of retention levels?

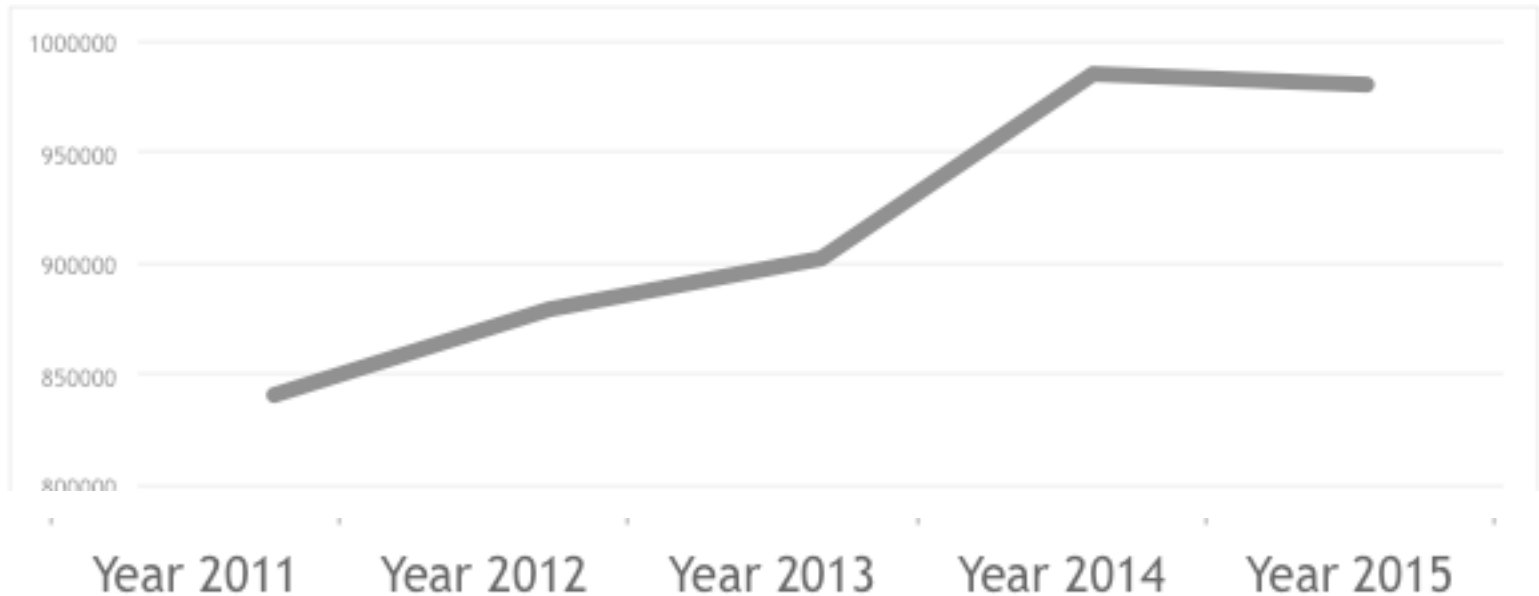
Catalyst? Use of data/ US model?



\* Source: Audience Finder, The Audience Agency

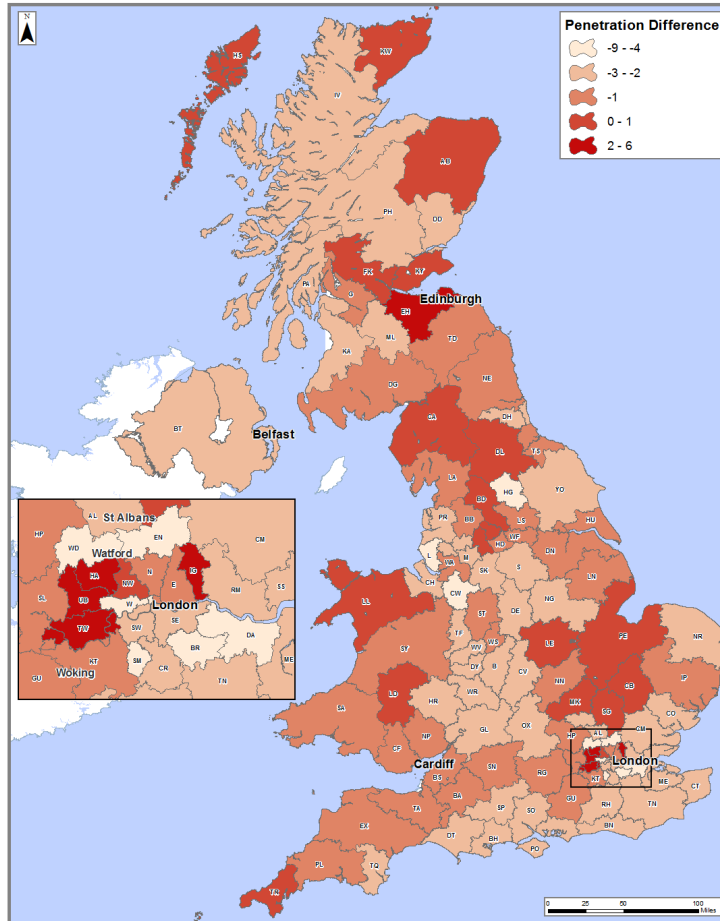
# Increase in households attending?

Overall audience numbers increasing



\* Source: Audience Finder, The Audience Agency

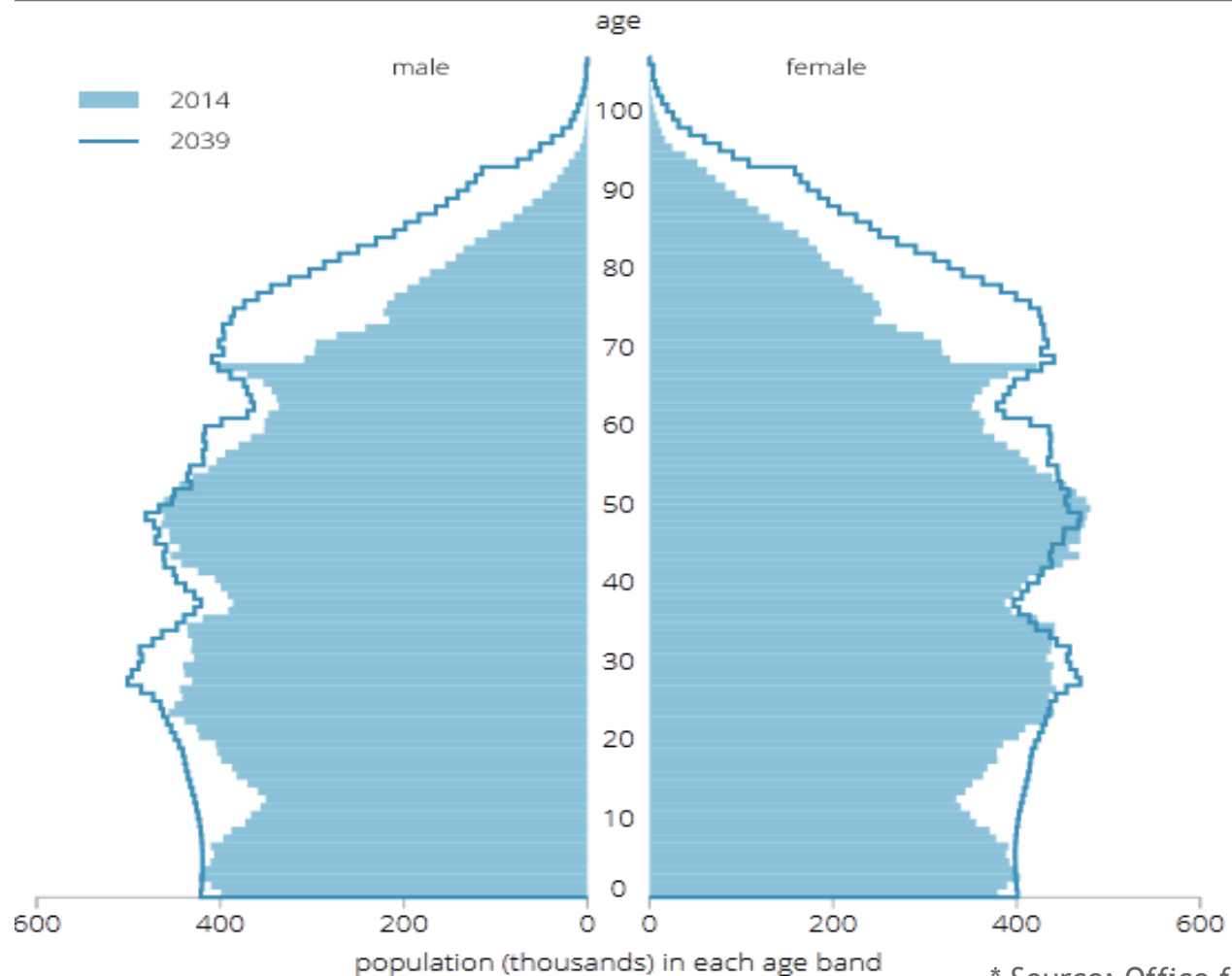
- Population modelling
- If profiles stay the same, average age of theatre audiences will increase considerably
- 3 top theatre-going groups set to age more than the population
- Younger “Experience seekers” prefer other artforms



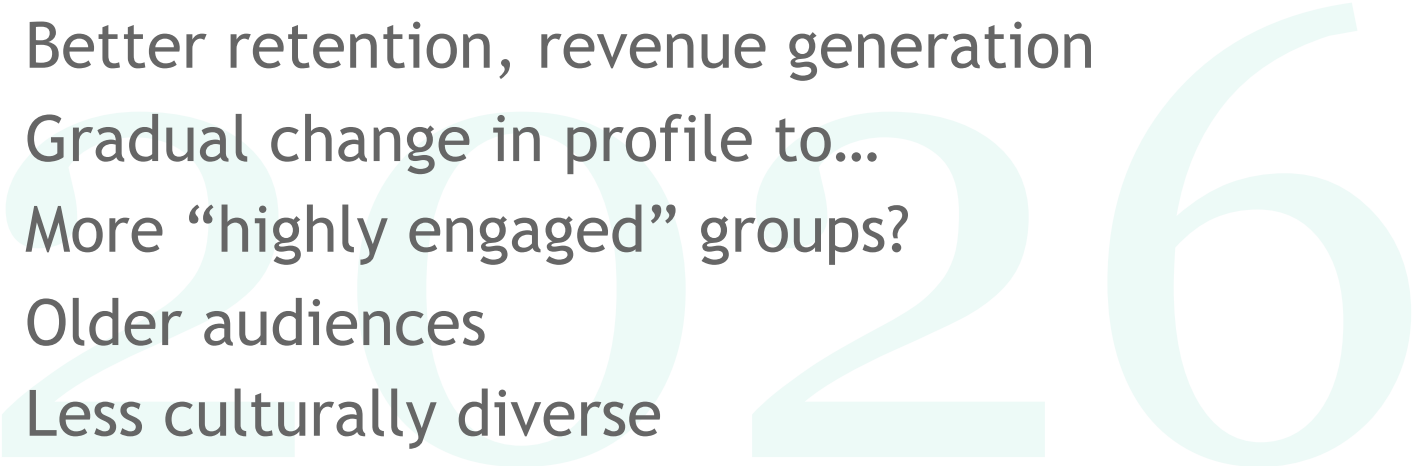
- On current profiles..
- Red areas where potential audience are growing...

\* Source: Mosaic Futures from Experian



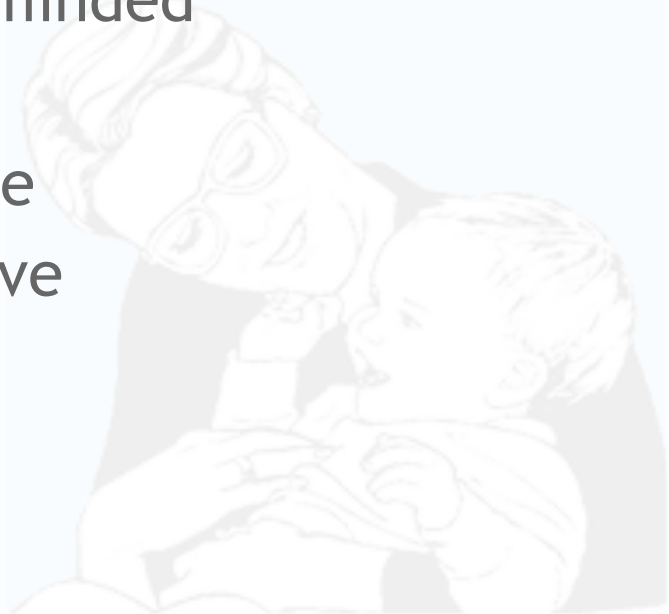


\* Source: Office for National Statistics

- 
- More households attending
  - Better retention, revenue generation
  - Gradual change in profile to...
  - More “highly engaged” groups?
  - Older audiences
  - Less culturally diverse
  - Online deepens the core audience relationship

- Ageing population
- Growing poverty gap, but many more “haves”
- Higher levels of education
- Unequal society: poverty gap
- Increasingly liberal (UK)
- Diverse identities
- Influence of Millennials and Gen Z

- In their 40s in 2026
- “Most over-researched generation in history”
- Civically, community minded
- Highly educated
- Liberal and progressive
- Adventurous, immersive
- = Experience-Seekers



# Generation

- In their 20s in 2026
- Super-visual
- “Tech innate”
- Need a cause
- Hard-working realists
- Makers not consumers
- Born collaborators

A large, bold, dark gray letter 'Z' with a slightly italicized or slanted appearance, positioned to the right of the list of characteristics.

*People - of all ages and in all markets - are constructing their own identities more freely than ever.*

- Trendwatching.com

Traditional demographics are “almost useless”...

*“Because, here’s a shocker for you, there are actually 19-year-old guys who watch Dance Moms, and there are 73-year-old women who are watching Breaking Bad and Avengers.”*

- Todd Yellin, Netflix

## Impact of social change?

**By 2026, may be in decline without knowing it!**

- Strong but ageing audiences
- Younger generations: higher levels of haves & education BUT not engaged?
- Harder to anticipate tastes
- Content is free
- Passive forms have little traction
- Benefits: congregational, authentic, immersive, creative/expressive opportunity, community



## Winners will...

- Be audience-focused: adapt anything
- Assume nothing: be in dialogue + use data
- Offer everything: variety of channels and experience
- Be committed
- Belong: take an active lead in their community
- Be distinctive, opinionated
- Create immersive experiences: with you not for you
- Invest now

# Increasingly irrelevant? We can develop diversity of audiences

RSC: Twitter Reach of 56 billion  
Shakespeare's anniversary week-end



A Midsummer Nights Dream: A Play for the Nation  
February\_2016 Chu Omambala as Oberon Ayesha Dharker as Titania 2016  
Photo by Topher McGrillis c RSC 184632[1]

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**Thank you**