

# Audience Finder Insight Event Series

## Navigating the audience age-gap

Briefing and implications

 the audience agency

Understand who your audiences are.  
Discover who they could be.

# From Baby-Boomers to Gen Z

Informal Audience Finder briefing

Anne Torreggiani

Chief Executive, The Audience Agency

 the audience agency

Understand who your audiences are.  
Discover who they could be.

Your audience data in

 audience  
finder

+

 audience  
spectrum

+

Mosaic Futures from





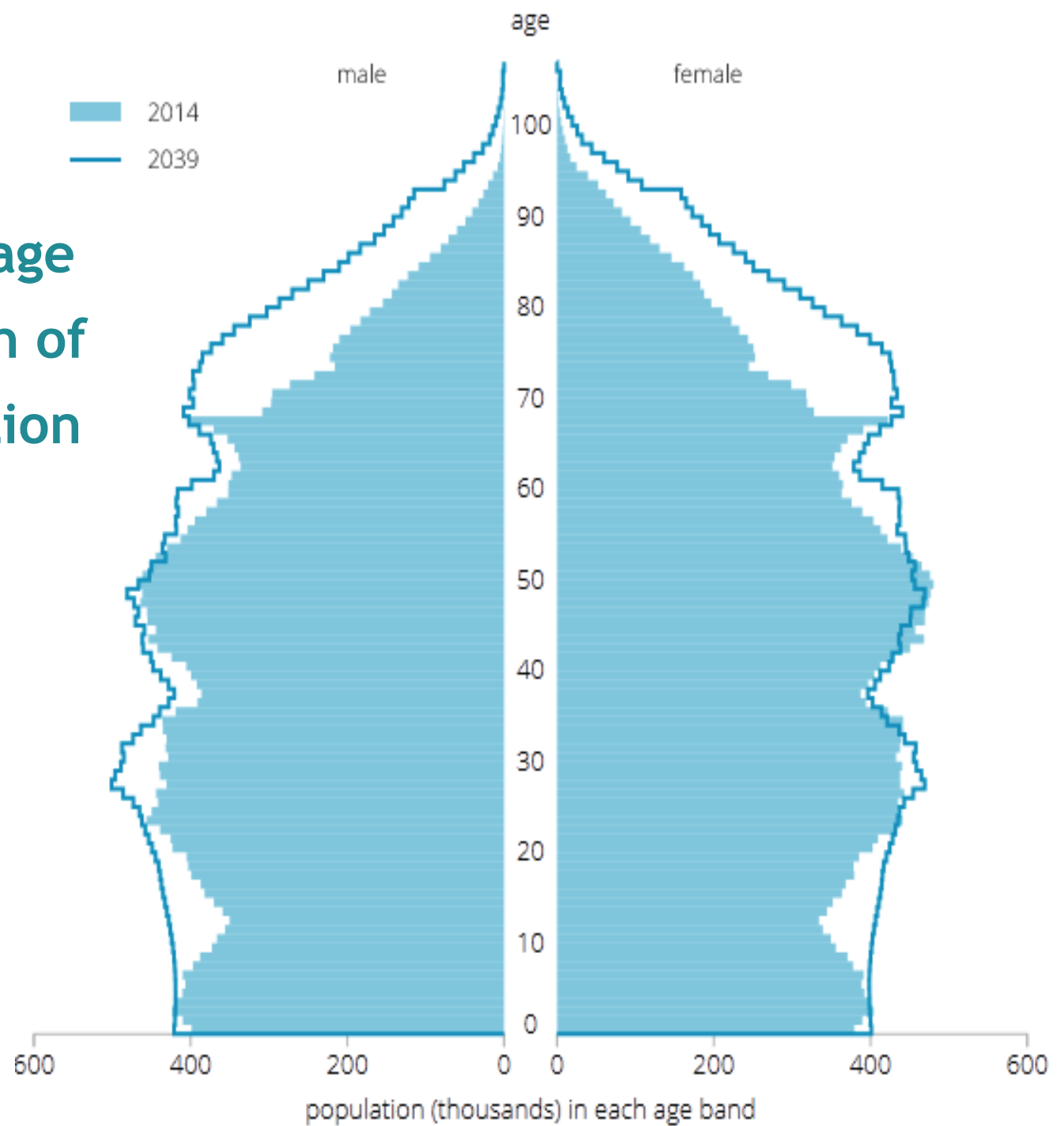
Baby-boomers



Millennials (Gen Y)



# Predicted change to age distribution of UK population



\* Source: Office for National Statistics

Find out who your audiences are and discover who they could be

# Log-in to Audience Finder for info about your audiences, about audiences everywhere

Register with Audience Finder for free today

Login

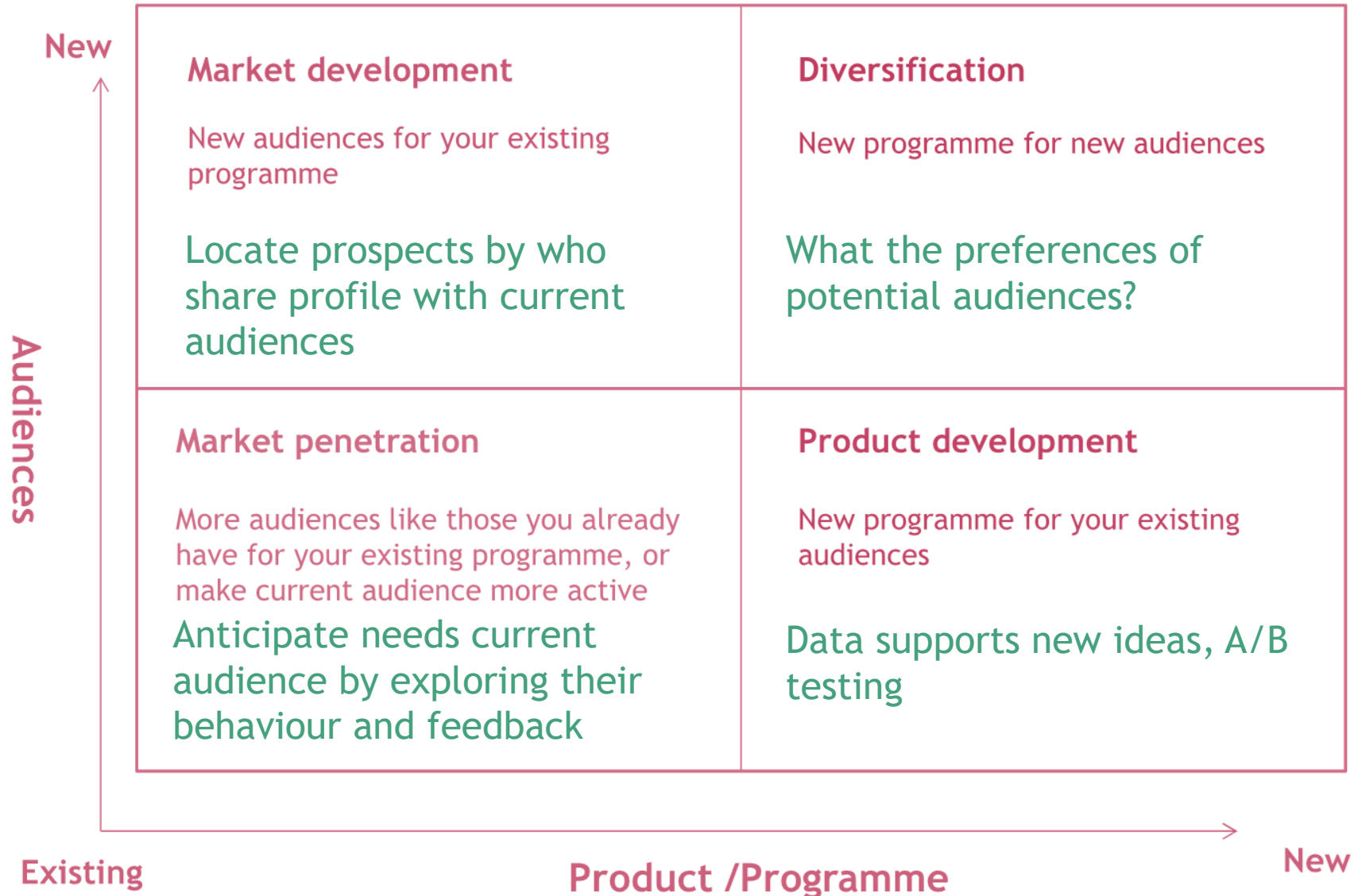
Don't have an account? [Register now for free](#)

Audience Finder is a free national audience data and development tool, enabling cultural organisations to understand, compare and apply audience insight.

Register now to discover national and regional audience insight, and explore mapping and planning tools.

# Audience Finder

primarily designed to help retain, grow and diversify audiences





# trend

/trɛnd/ 

*noun*

an underlying pattern of behaviour over time which would otherwise be partly or nearly completely hidden by noise.



# audience spectrum




Commuterland  
Culturebuffs



Experience  
Seekers

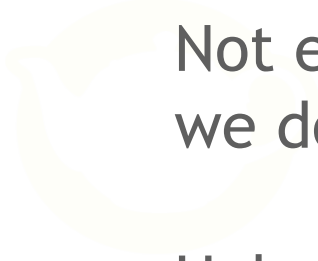


Dormitory  
Dwellers

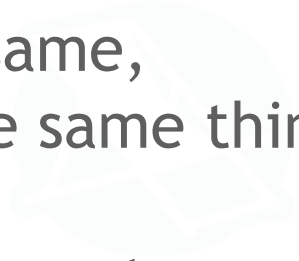


Trips & Treats

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



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



Up Our Street



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

Facebook  
Families



Kaleidoscope  
Creativity



Heydays



Metroculturals



Commuterland  
Culturebuffs



Experience  
Seekers



Dormitory  
Dependables



### 3 Highly Engaged Groups

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



Facebook  
Families



Kaleidoscope  
Creativity



Heydays



Metroculturals



Commuterland  
Culturebuffs



Experience  
Seekers



Dormitory  
Dependables



Trips & Treats



Home &  
Heritage



Up Our Street



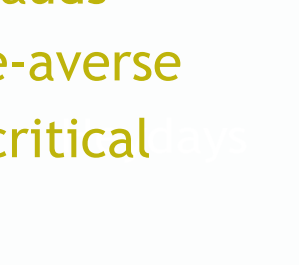
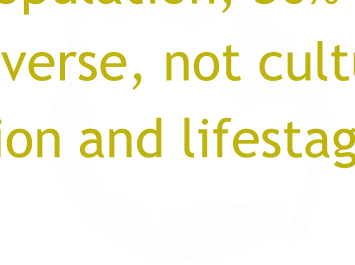
## 3 Medium Engaged

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

Facebook  
Families



Kaleidoscope  
Creativity



# 4 Less Engaged Groups

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

Experience  
Seekers



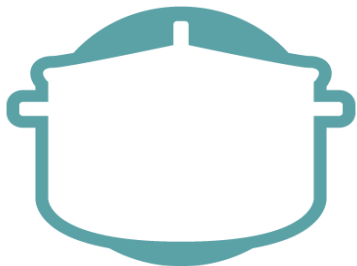
Home &  
Heritage



Up Our Street



Facebook  
Families



Kaleidoscope  
Creativity



Heydays

Metroculturals

Commuterland  
Culturebuffs



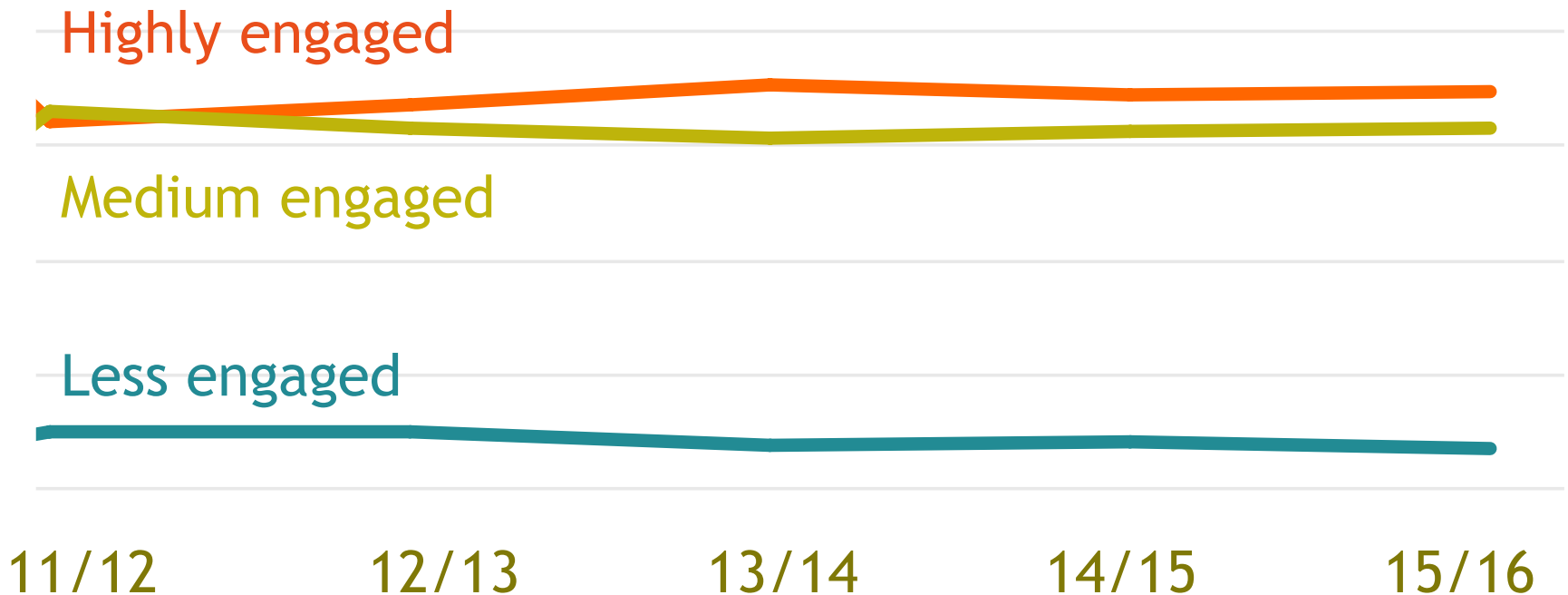
Dormitory  
Dependables



Trips & Treats

# Changes in profile over 5 years

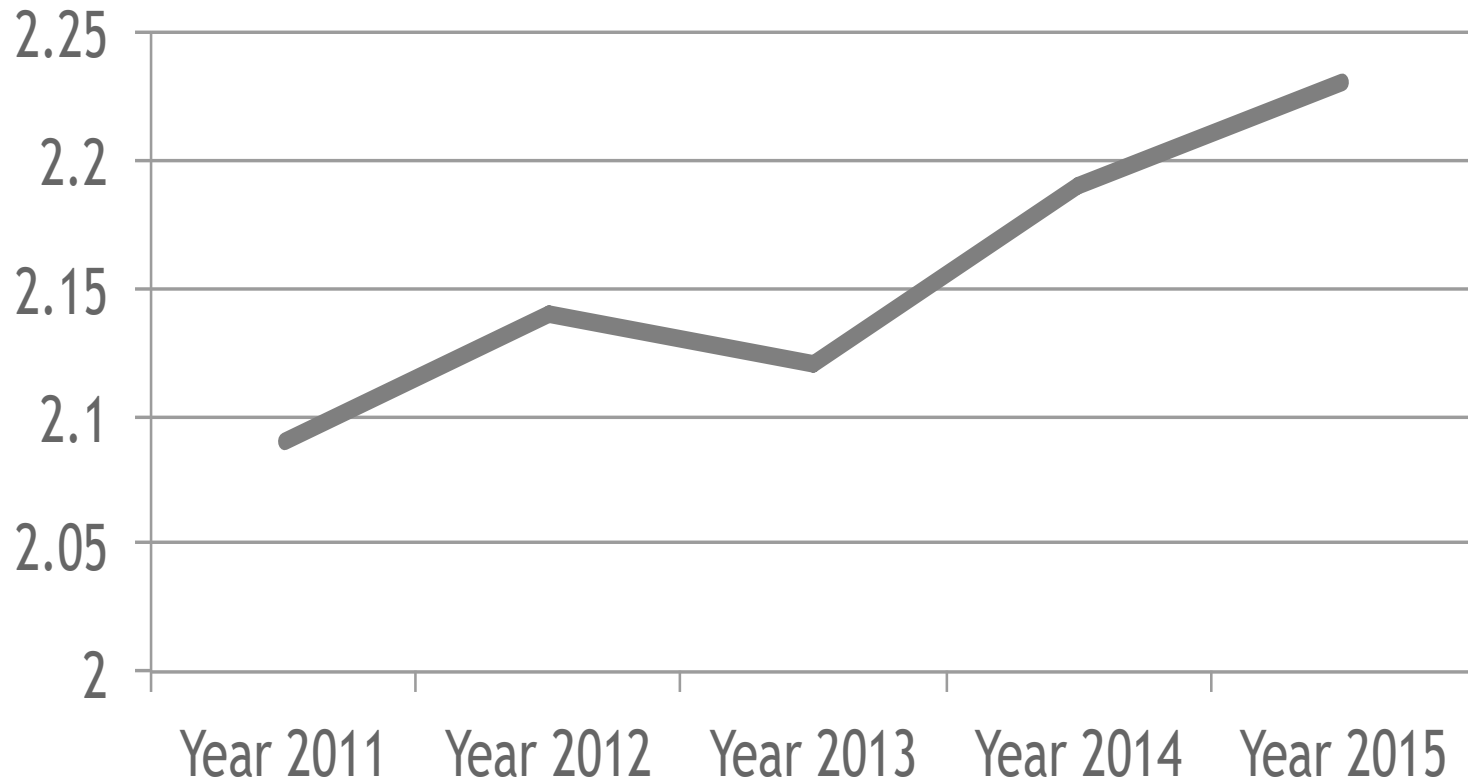
Slight rise in higher engaged groups:  
Reflects increases in frequency?



# Changes in frequency of visits?

Overall improvement of retention levels?

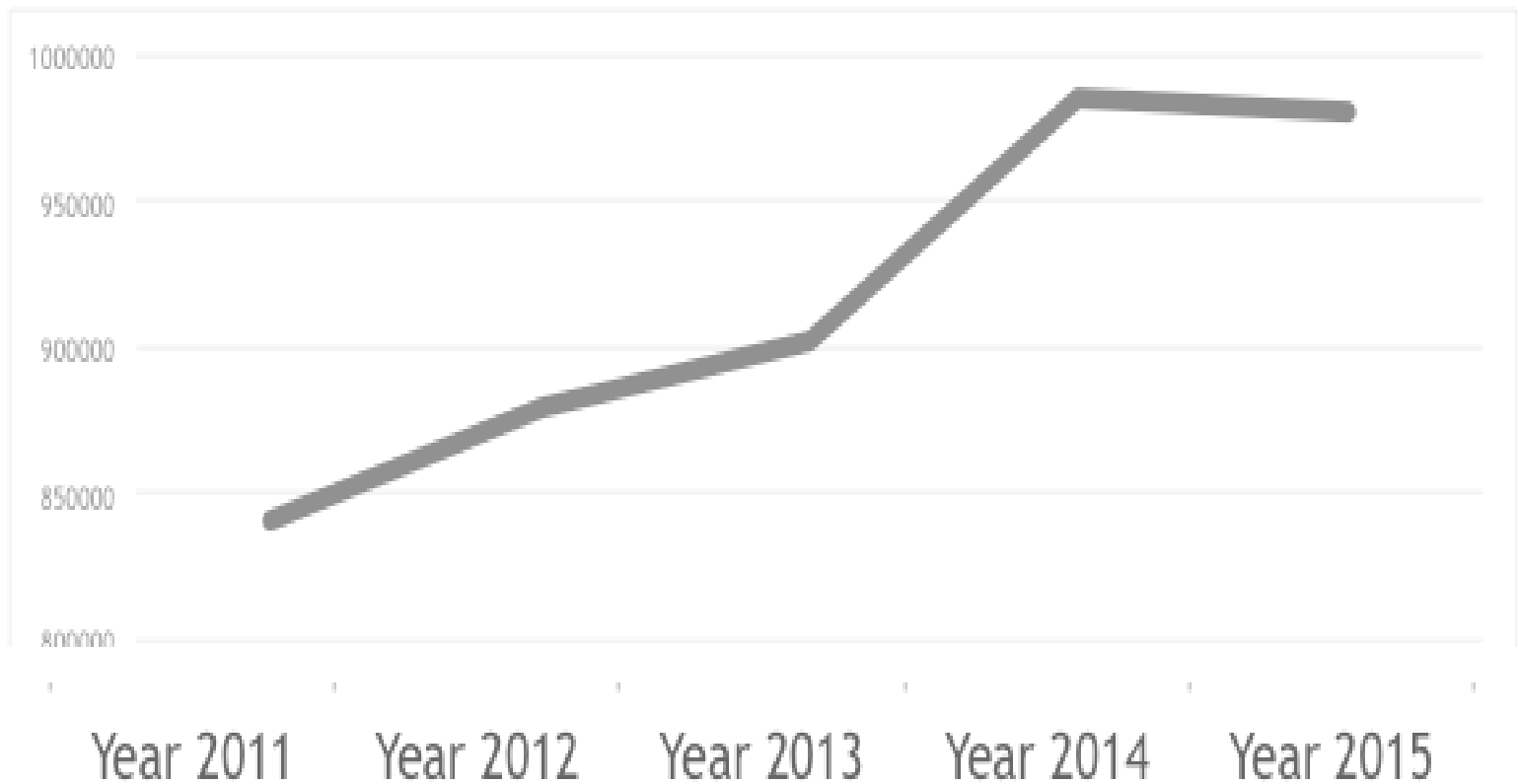
Catalyst? Use of data/ US model?



\* Source: Audience Finder, The Audience Agency

# Increase in households attending?

Overall audience numbers increasing



\* Source: Audience Finder, The Audience Agency



# Baby-boomers



Commuterland  
Culturebuffs



Dormitory  
Dependables



Home &  
Heritage

# Millennials

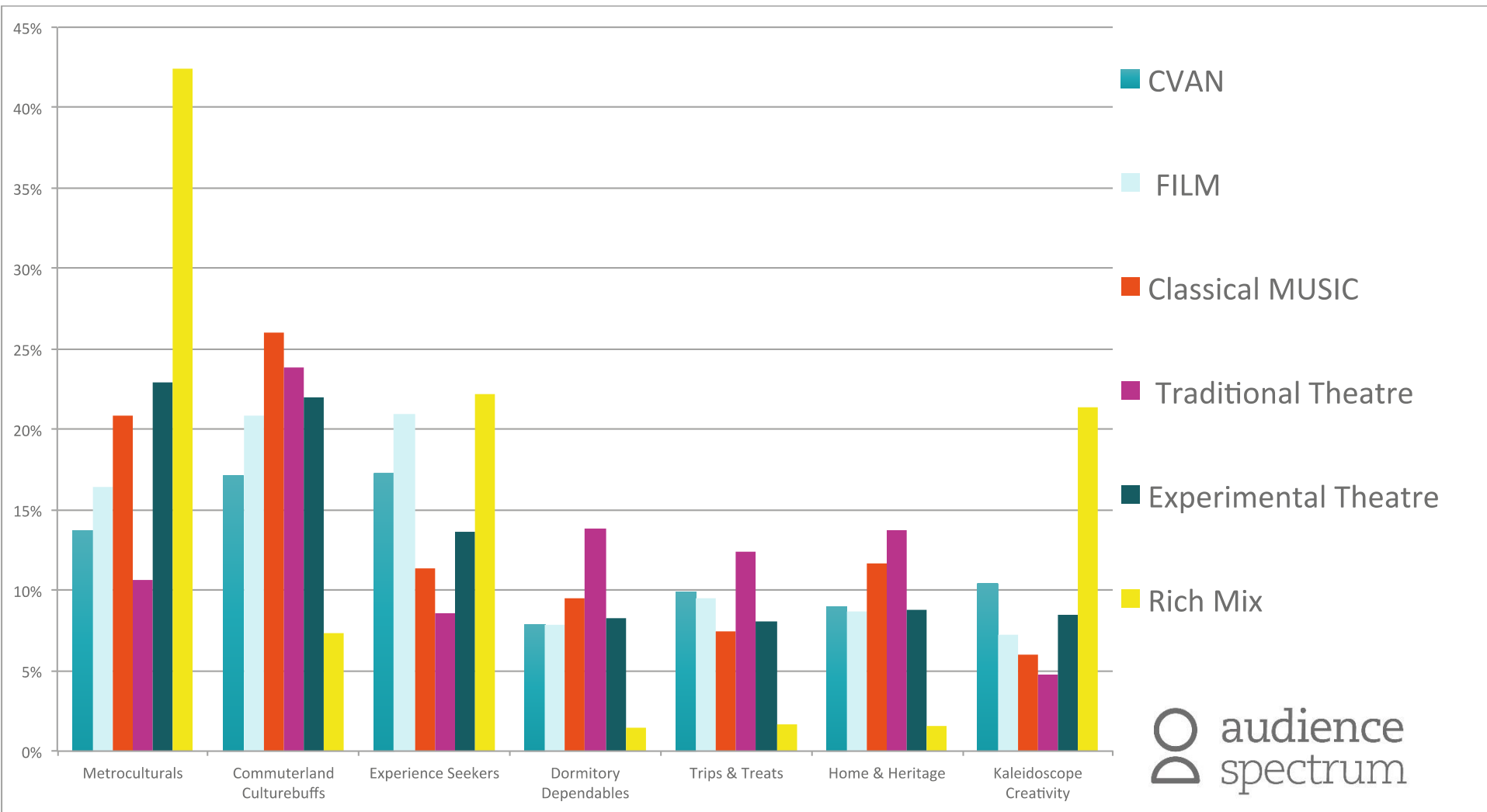
Experience  
Seekers



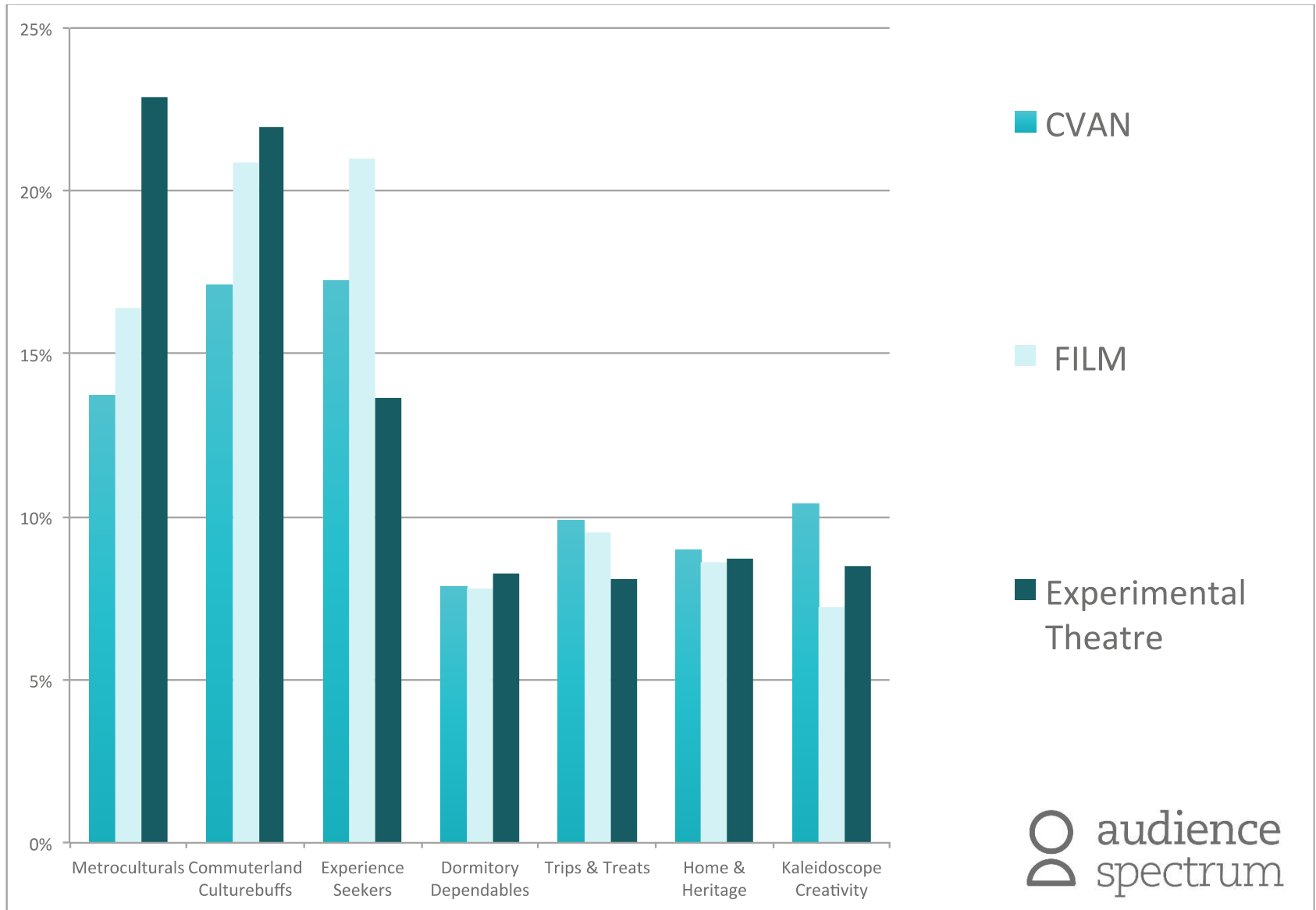
Trips & Treats



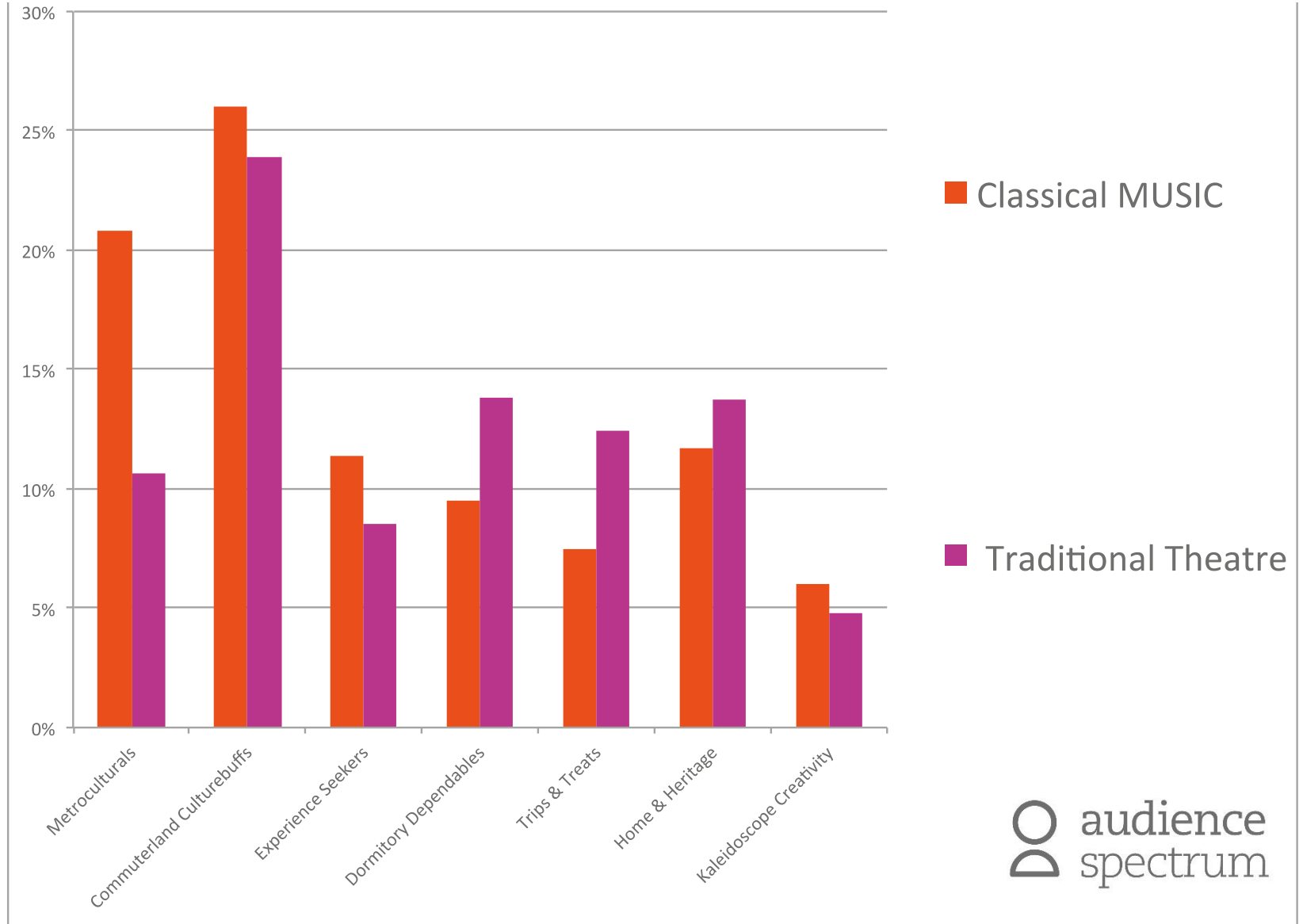
# Audience Spectrum Profile by artform groups



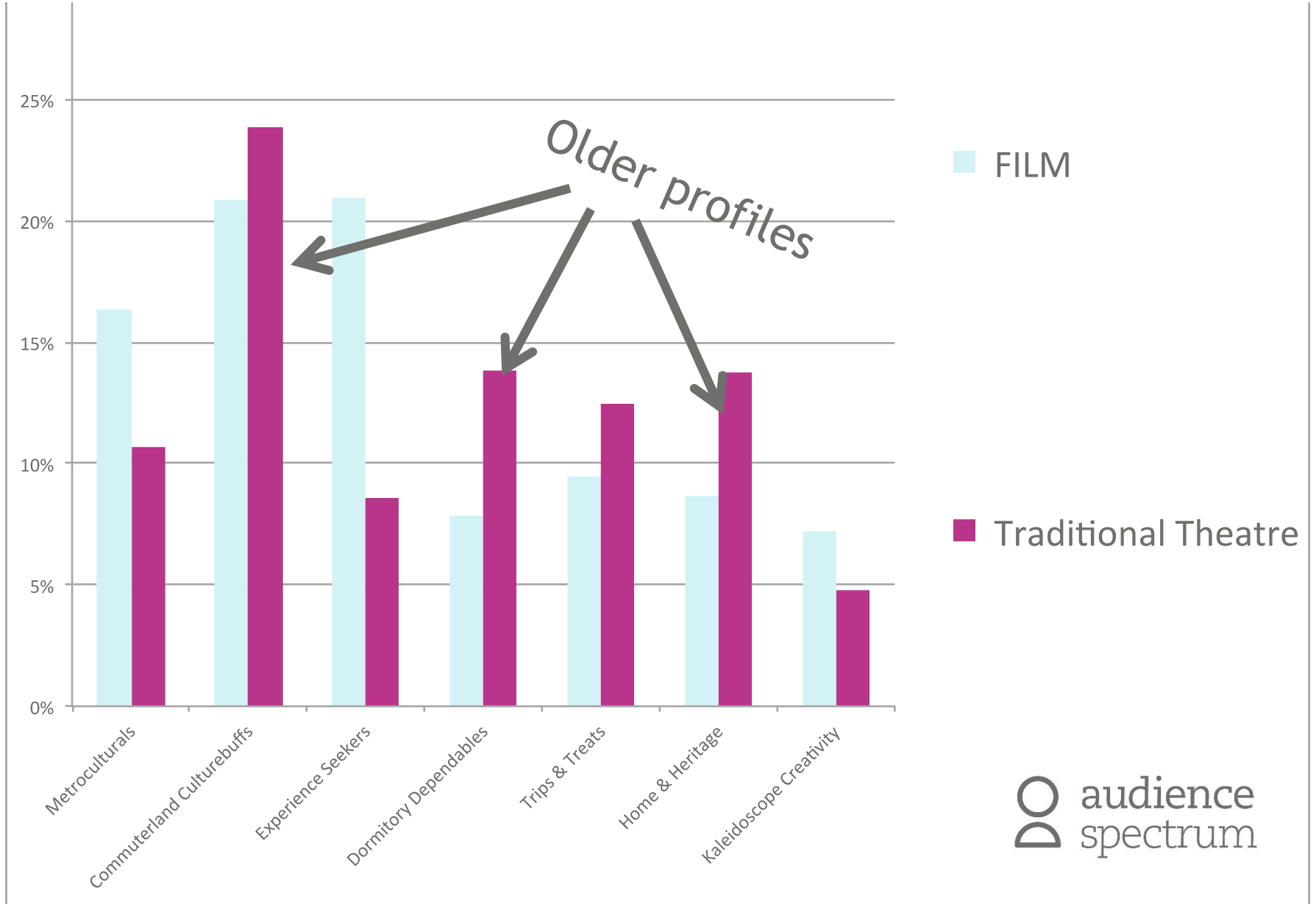
# AS Profile by contemporary artform groups



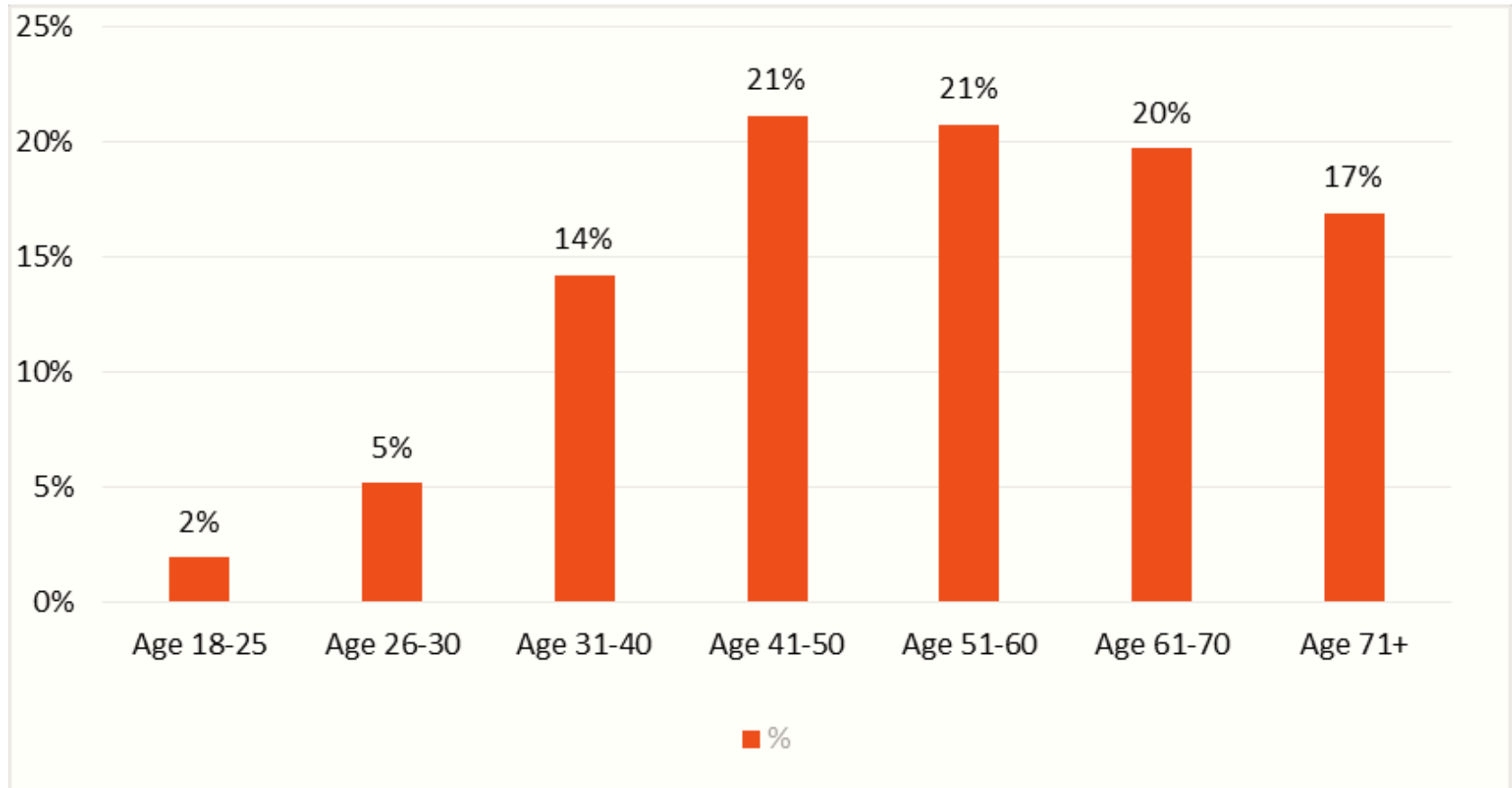
# AS Profile by classic artform groups



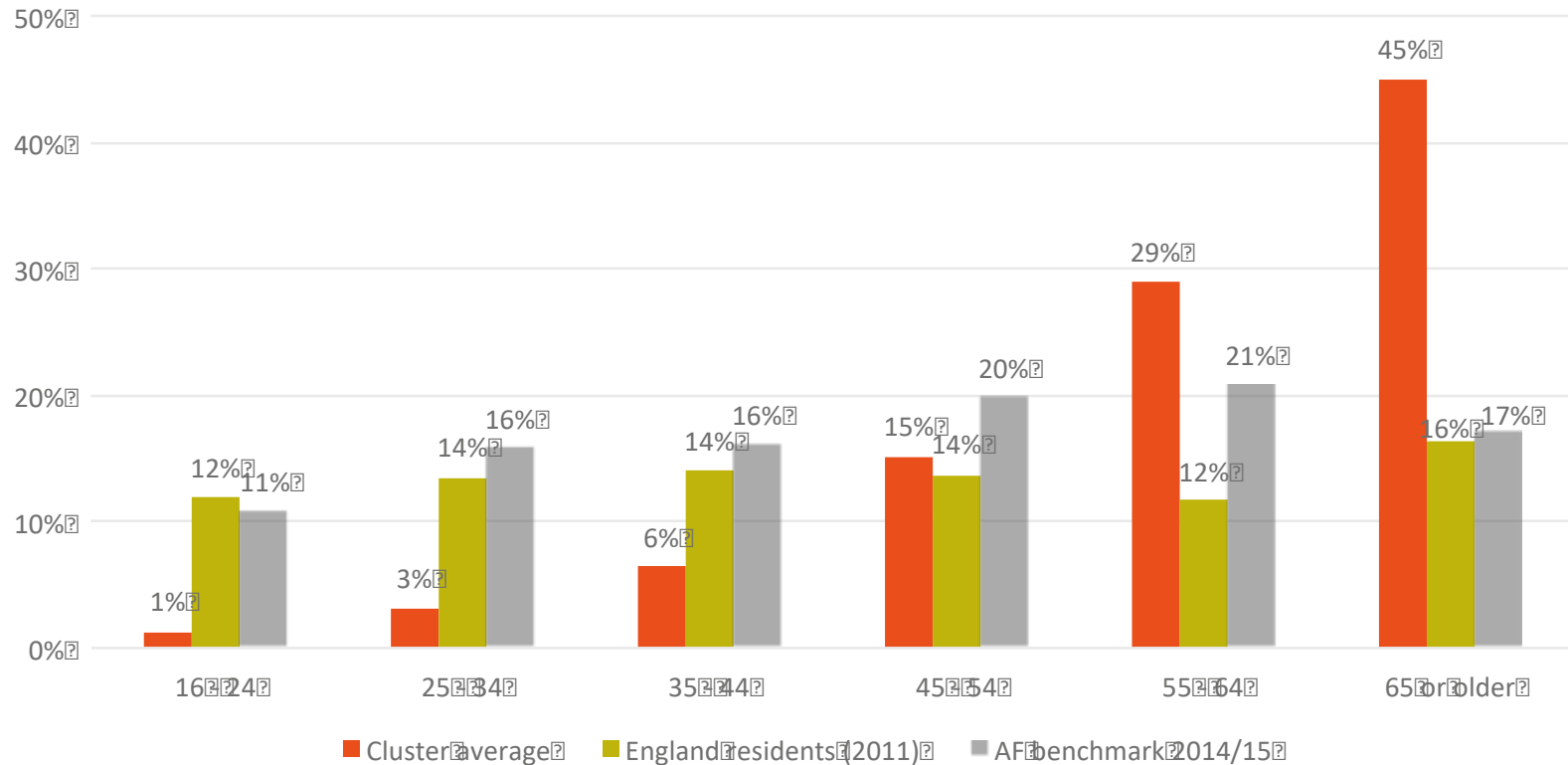
# Independent Film vs Traditional Theatre



# Modelled Age Breakdown: Classical Music



# Age: 2015-16 classical music survey (non-London)



74% aged 55+ Exceptionally high compared to English population and Audience Finder benchmark. Non-London



# Hypothesis

- If profiles stay the same, average age of audiences for “classic work” will increase considerably
- Three top arts-attending groups set to age more than the population
- Younger “Experience seekers” prefer other artforms/ experiences - don’t follow their parents’ habits
- The gap between the habits of older and younger audiences gets wider



# Population

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

# Audiences

- More households attending
- Better retention, revenue generation
- Gradual change in “Classic audience” profile to
- More “highly engaged” Baby-boomers?
- More homogenous less diverse
- Online deepens **the** core audience relationship



# Audiences



BUT

- Younger audiences attend less traditional arts experiences in large numbers
- Social/ ethnic diversity increases as the effect of larger scale tertiary education increases

Some day when you grow up to  
become a  
Millennial, you'll  
be lazy, entitled,  
and good with the  
internets.



someecards  
user card

# Generation Z

- In their 20s in 2027
- Super-visual
- “Tech innate”
- Need a cause
- Hard-working realists
- Makers not consumers
- Born collaborators
- Split-screen consumption

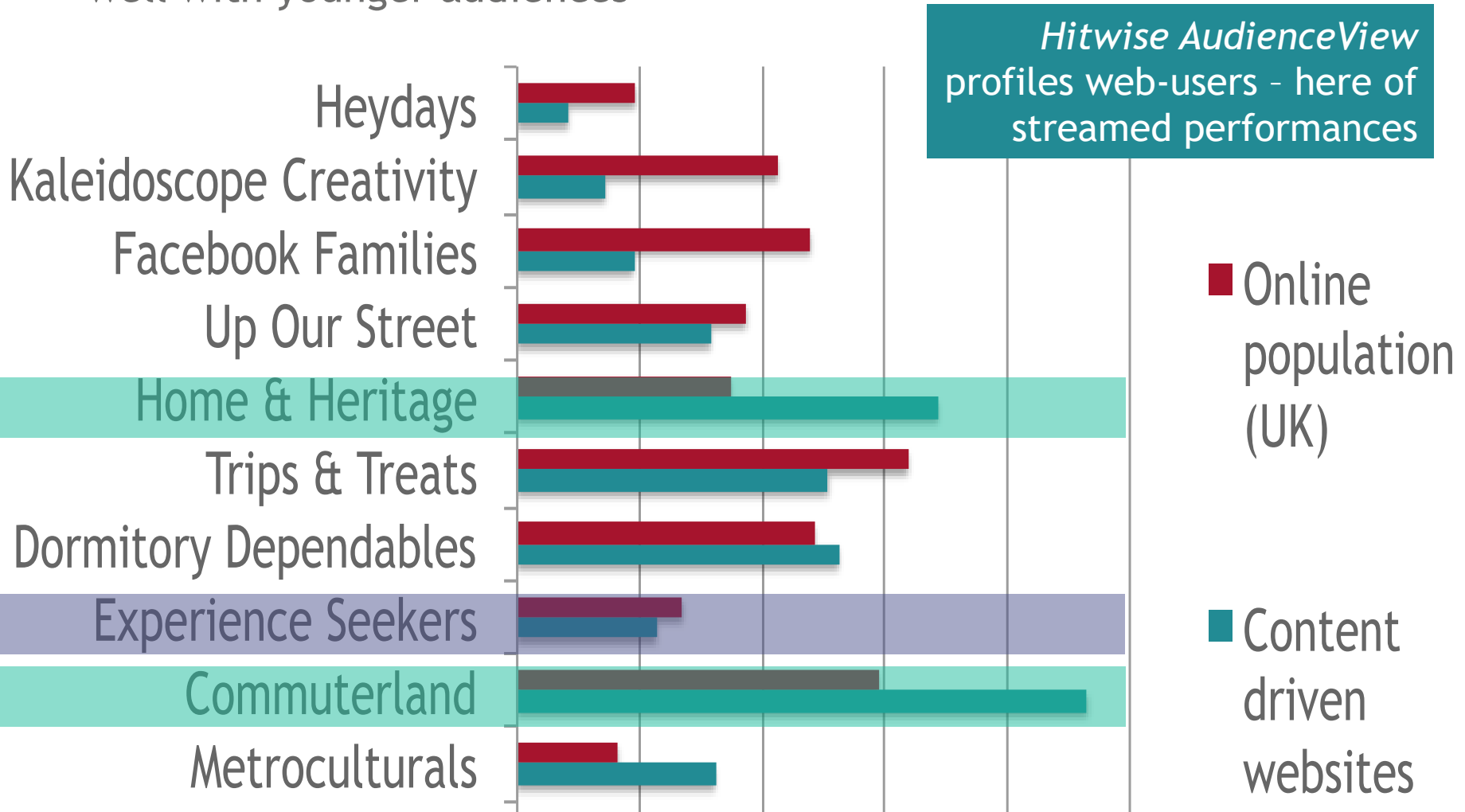


# Predicting the Future?

- Audiences continue to grow: to spend more, do more, donate more
- Audiences overall are older and less interested in new forms and practice
- Younger (Millennial) audiences are increasingly restricted to contemporary artforms
- Younger audiences are more diverse

# Use online theatre content (mash-up)

Reaches core + older audiences further away from venues, not doing well with younger audiences



\* Source: Hitwise we analysis tool, for The Audience Agency





[Download](#)

[Experience Seekers  
statistical appendix](#)

---

Engagement rank: 3

---

Population: 8% of English households

# Experience Seekers

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 and younger people 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 a wide variety of arts, museums, galleries and heritage
- Interests cover mainstream, contemporary and culturally diverse offers and attending is at the heart of their social lives
- They are mostly in search of new things to do and have disposable income to spend on a variety of leisure activities like sports/arts memberships, visits to cafes, bars and restaurants
- Typically digitally savvy, they will share experiences through social media on their smartphones

## - Interests

### Culture interests

Their engagement is likely to be wide but not deep, though nearly half consider themselves 'arty'. They are mostly seeking out new things to do to accompany their social lives and easy access to a wide range of cultural offers from their home location makes this possible.

# Experience Seekers



[Download](#)

[Experience Seekers  
statistical appendix](#)

Only 25% migrate to traditional arts attender profiles

---

Engagement rank: 3

---

Population: 8% of English households



# Home and Heritage

Rural areas and small town, day-time activities and historical events

- A more mature group that is generally conservative in their tastes
- Large proportion are National Trust members
- Classical music and amateur dramatics are comparatively popular
- While this is not a highly engaged group – partly because they are largely to be found in rural areas and small towns – they do engage with local cultural activity
- Likely to look for activities to match their needs and interests, such as accessible day-time activities or content exploring historical events

[Download](#)

[Home and Heritage statistical appendix](#)

- [Overview](#)

## Lifestage

Older people, living outside of major towns and cities and in rural areas across the UK with the lowest proportion found in London.

Engagement rank: 6

Population: 10% of English households



# Home and Heritage

[Download](#)

[Home and Heritage  
statistical appendix](#)

**30-40% Commuterland  
Culturebuffs... mainstay classic  
audiences outside London...  
migrate to less engaged H&H**

---

Engagement rank: 6

---

Population: 10% of English  
households

---

# Predicting the Future?

- Audiences plateau, start to decline
  - Baby Boomers face more barriers, frequency declines
  - Gen X/ Millennials do not migrate to classic artforms
  - Majority seek a different kind of cultural offer
- BUT
- More adults than ever before have tertiary education
  - Social/ ethnic diversity increases in society, and in our audiences

**Are you being served?  
Worst-case arts organisations?**



# Worst Case Arts Organisations?

- Tuned to majority audiences
- CRM and fundraising favours traditional behaviours
- Lack 360° audience monitoring
- Rely on tried-and-tested engagement formulae
- Agile programming/ user-centred NOT in the mix
- Outside large urban centres?

## Responding....

- More flexible, relaxed visitor experiences - e.g. flexible booking, refunds, try-before-you-buy, social space, personal devices
- Changes in price-sensitivity - freemium content
- Increased interested in curated experiences (festivals)
- Shelf-life of product-content - respond agile way to demand
- Radical changes to loyalty development - direct marketing to membership



## Responding....

- Service/ programme design through dialogue and interactivity
- Community-led programming - divide between liberal engagers and reactionary arts rejectors
- Accommodating audiences with strongly divergent preferences
- Also catering to the needs of older audiences - particularly 75+



Tomorrow's audiences

## Responding....

- Start relationships earlier
- Create new experiences which encourage life-long engagement
- Participation and family attendance vital
- Immersive young people's programmes
- Better understanding of young people - not an homogenous group

Cultural segmentation young people?

Thank you!  
[theaudienceagency.org](http://theaudienceagency.org)

 the audience agency

Understand who your audiences are.  
Discover who they could be.