

How are audiences changing? And how do we keep up?

Anne Torreggiani, CEO (Co-Director, Centre for Cultural Value at University of Leeds)



A talk in 3 parts

How do we track change?

Some Audience Agency tools

How are audiences changing?

Our trend analysis

How should we respond?

A design-based approach and programme

1. The Audience Agency

*Sharing insights to help organisations increase their **relevance, reach and resilience**.*

- Non-profit charity
- Independent research organisation, rooted in practice
- “Evidence-led and people-centred”
- Work with 100s cultural organisations, municipalities, UK and international
- R&D, audience development, experience design, evaluation, participation
- Collaborative principle: sharing data and knowledge

Part 1

How do we track change?

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1. The Audience Agency: how we track change

Signature Insights & tools to help the sector

- **Audience Answers** - aggregating and comparing audience data, the big picture for all
- The **Cultural Participation Monitor** - tracking trends across the population
- **Audience Spectrum** - a national segmentation
- Peer learning/ **action research** programmes - making sense of the insight

Cultural Participation Monitor

The Audience Agency's nationwide longitudinal (ongoing) panel survey of changing views about participating in creative and cultural activities through the pandemic recovery period and beyond.

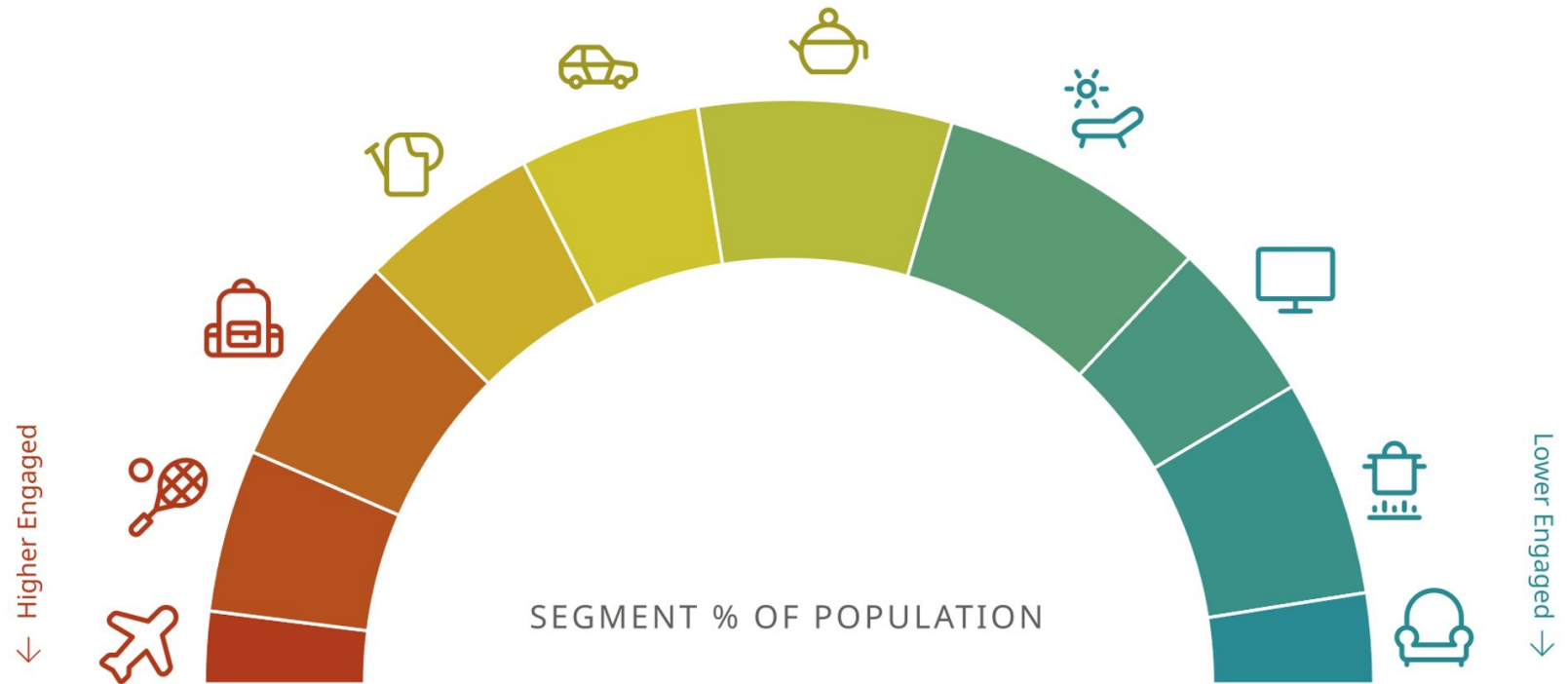
- Every 4 months
- Quick indicators
- Current issues
- Sector-led
- An opportunity for all
- Audience Spectrum-linked
- Part of Audience Answers

**CENTRE FOR
CULTURAL VALUE**



1. Audience Spectrum: understanding audiences

- Segmentation of the UK population
- By attitudes towards culture
- Profile households by their cultural interests and habits
- Applied to cultural organisation's audiences



1. Why segmentation matters

A model for developing audiences over time

- Meeting the different needs of different people
- Prioritise and organise
- Create relevant offers, communications
- Make sense of intelligence / data available
- Track and evaluate - needs of different groups



Resource: Creating An Effective Audience Development Plan
www.theaudienceagency.org/resources/guide-to-audience-development-planning



1. How does Audience Spectrum work?

- Based on real data: our research + Census, consumer and demographics
- **Every UK household** is “tagged” - 1/20 groups, predicting their interest-behaviour
- Only **geo-location** segmentation for culture UK
- **Tested** for accuracy against what people actually do
- **Relevant to *all* cultural organisations**, of all shapes and sizes
- Respectful and **inclusive**
- **Truly actionable**...gets better the more we use it
- A *lingua franca* for 1000+ organisations



METROCULTURALS | M1 & M2



Older, established and high-spending professional elites.



Younger, mobile and emerging metropolitan professionals.

COMMUTERLAND CULTUREBUFFS | C1 & C2



Prosperous families, living in the commuterbelt of major urban centres.



Wealthy empty-nesters with comfortable lifestyles in more rural areas.

EXPERIENCE SEEKERS | E1 & E2



Socially minded mid-life professionals with varied artistic tastes.



Students and graduates with adventurous attitudes in diverse urban areas.

DORMITORY DEPENDABLES | D1 & D2



Commuter-town families, investing for the future.



Settled, comfortable residents, enjoying regional life.

TRIPS & TREATS | T1 & T2



Modern young families, building a future.



Settled families with established lifestyles.

HOME & HERITAGE | H1 & H2



Settled suburban seniors.



Affluent residents of rural idylls.

UP OUR STREET | U1 & U2



Middle-aged inhabitants of semis on the edge of town.



Older residents of terraces and flats in built up areas.

FRONTLINE FAMILIES | F1 & F2



Older families, getting by despite challenges.



Younger, cash-strapped families and couples starting out.

KALEIDOSCOPE CREATIVITY | K1 & K2



Settled and diverse urban communities.



Hard-pressed singles in city tower blocks.

SUPPORTED COMMUNITIES | S1 & S2



Young, immobile and hard-up, often relying on welfare to get by.



Elderly residents of sheltered housing with declining health.

1. Audience Spectrum... TAA's Golden Thread

- Free and paid through “Audience Answers” Platform
- Embedded in CRM systems/ database profiling
- Resources and Support
- Population Reports
- “Audience Spectrum Bespoke”
- Collaborative networks
- As part of our research-led consulting work



Part 2

How do we track change?

Some Audience Agency tools

How are audiences changing?

Our trend analysis

2. How are audiences changing?

Recent shifts in audience profile and behaviours likely to stick and accelerate...

- Patterns are being redrawn
- Post-Covid shifts
- Social-economic change
- Gen Z & A
- Digital disruption: AI



A few challenges predicting trends...



[← Back to all segments](#)

Experience Seekers

Highly active, diverse, social and ambitious regular and eclectic arts engagers.

An important and significant part of urban arts audiences, these highly active, diverse, social and ambitious singles and couples are younger people engaging with the arts on a regular basis. Students, recent graduates and in the early to mid-stages of their careers, they live close to city centres, 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 and frequent visits to cafes, bars and restaurants. Digitally savvy, they will share experiences through social media on their smartphones.

[Download our new Motivation Guide PDF >](#)



IN THIS SECTION

- 1. Profiles
- 2. Attitudes
- 3. Sectors
- 4. Places
- 5. Digital Activities
- 6. Communications
- 7. Subsegments | E1 & E2

KEY STATISTICS

Activity Level:

High Cultural Engagement

Spectrum Ranking:

3 / 10

Audience Answers Benchmark:

10% of Active Audiences

Population Prevalence:

9% of UK Population

New

Experience Seekers Further Segmented

While all Experience Seekers broadly share core characteristics, closer examination reveals two key subsegments who differ in life stage and style. If your target audience or local area is heavy on Experience Seekers, then understanding their variety can help with programming, marketing and outreach.

Experience Seekers | E1



Socially minded mid-life professionals with varied or tastes.

[Find out more about E1 >](#)

Experience Seekers | E2



Students and graduates with adventurous attitudes, urban areas.

[Find out more about E2 >](#)

CORE CHARACTERISTICS OF EXPERIENCE SEEKERS

Profiles

A younger-leaning, lively and active cohort of busy, mixed prosperity professionals, from a wide range of backgrounds and at a variety of different life stages.

[Read more about Profiles >](#)

Attitudes

Culture is at the heart of this group's social life and motivates them to seek out frequent new experiences with friends, and look for discounts to support diverse interests.

[Read more about Attitudes >](#)

Sectors

Open to pretty much anything, but with a clear leaning towards the contemporary and culturally specific, this group particularly enjoys immersive and participatory arts.

[Read more about Sectors >](#)

Places

This predominantly urban group lives within easy reach of a wide range of cultural provision, but is also prepared to travel to experience new activities and places.

[Read more about Places >](#)

Digital Activities

This is the most digitally confident spectrum segment, using the internet to access almost all of their information about events and make decisions regarding what to attend.

[Read more about Digital Activities >](#)

Communications

The challenge is grabbing their attention amongst the plethora of offers that might appeal, so prominent listings and engaging online and social media content are crucial.

[Read more about Communications >](#)

2. So what IS changing: 3 themes

Values

Taste

Experience

Values

WE NEED
CHANGE

Higher % audiences will be concerned about of climate and social justice

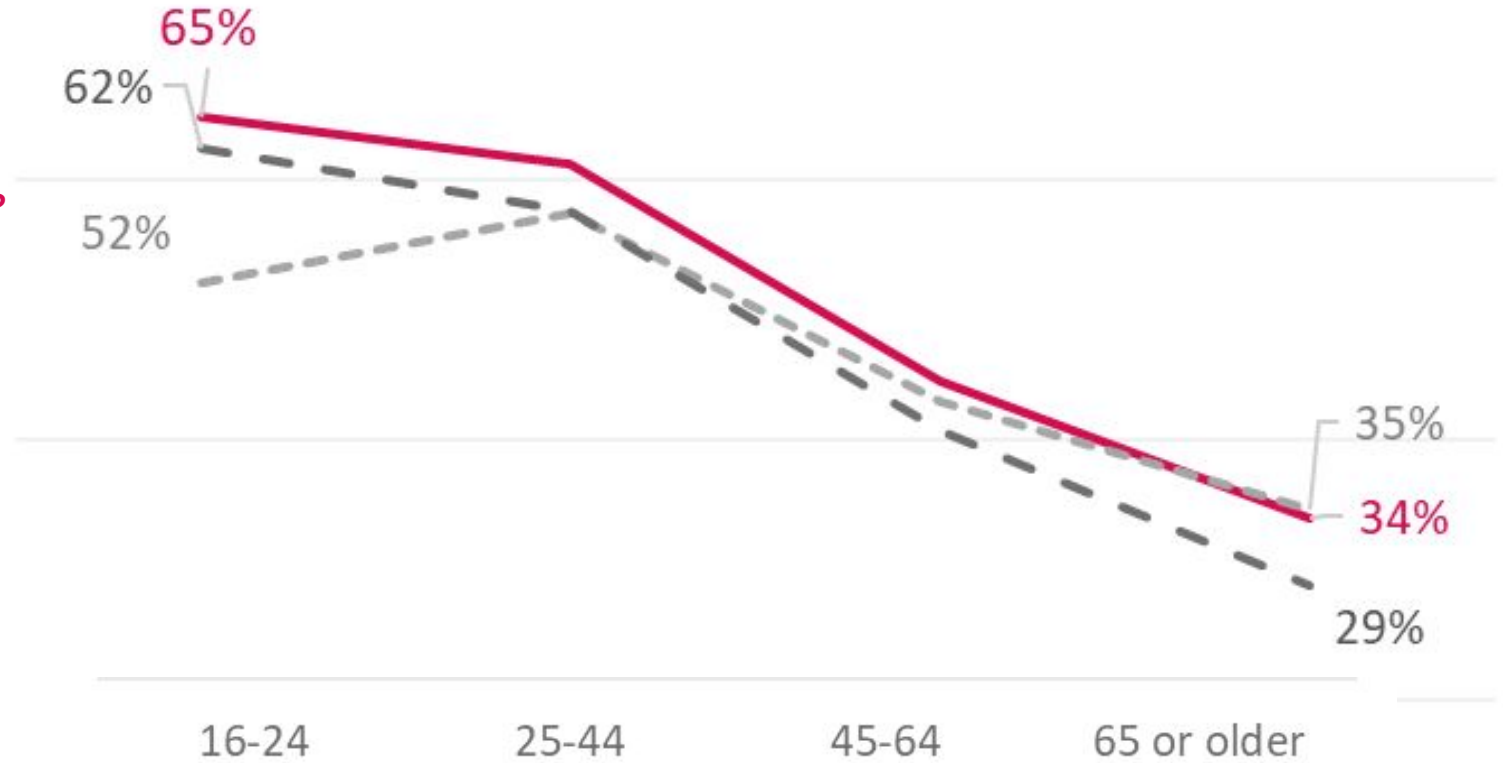
Audiences will expect us to align with their values

Values

Prefer to go to venues which share my values —————

Venues should take a stance on climate change - - - - -

Venues should take a stance on social issues - - - - -



Values: what do we do now...?

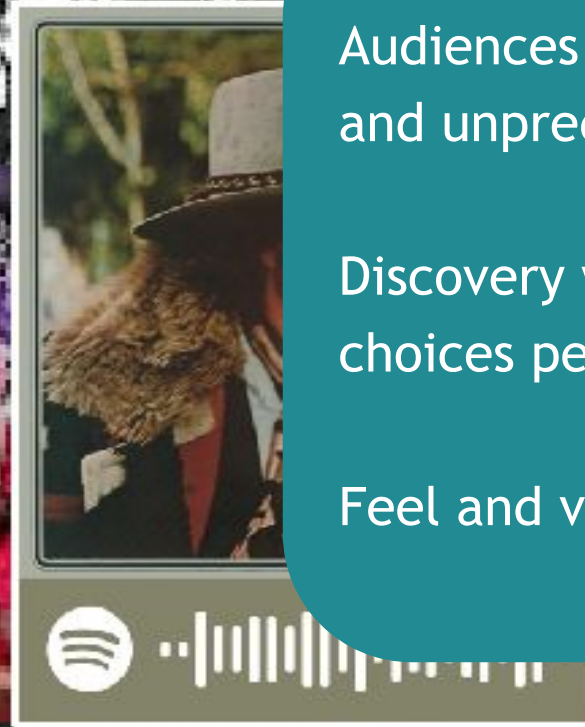
- Amplify your values
- Be a community resource
- Offer audiences opportunities to engage and take action
- But - not all current audiences on the same page
- Proceed with sensitivity
- Join the conversations: create opportunities for debate

THE SMITHS

motörhead

JOY DIVISION

Taste



Audiences will have more eclectic and unpredictable tastes

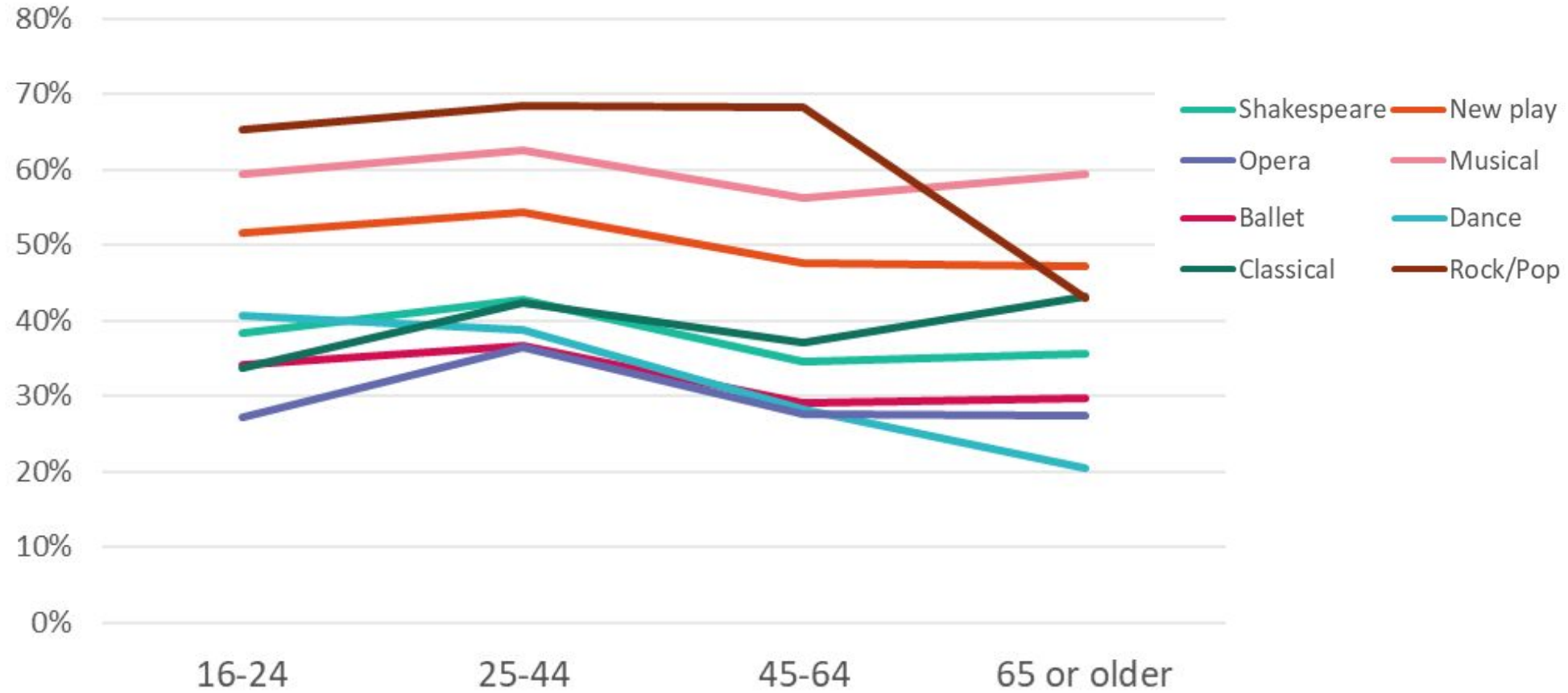
Discovery will be easier, making choices perhaps harder

Feel and vibe will trump content

Taste

% Interested attending live events by type

Rating 4/5



Taste: what do we do now...?

- Need to know our audiences better than ever
- Conversations and dialogue too
- Layered, micro-segmentation PLUS...
- Develop a prototype and test habit
- Own/ take back the relationship
- Understand/promote DIFFERENT benefits

Experience

Experiences worth going out for

BUT informal, on own terms

Social opportunity remains high

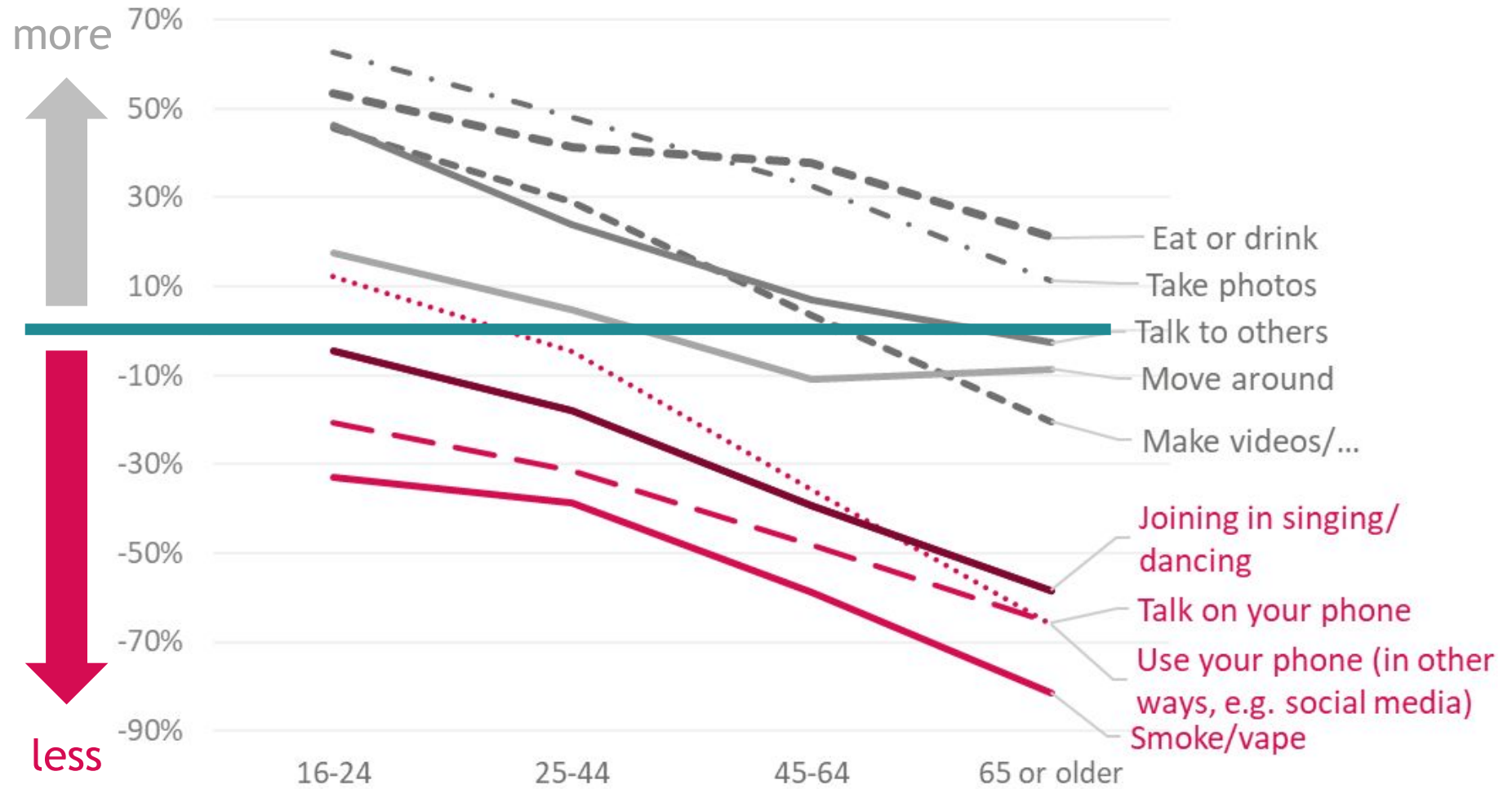
Community and connections - being part of something

FOMO and “FOGO”?

Experience

Would you be more or less likely to want to go to a live cultural event if you or others could do the following:?

Net more/ less



Experience - what do we do now...?

- Question our own rules, learn flexibility
- Same/ similar content - different format
- Audience-centred approach - new experiences with, by, for new audiences
- Test and iterate...

Part 3

How are audiences changing?

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3. So what do we do in an unpredictable world...

- Stay close to audiences
- Beyond the algorithm
- Invest in relationships: become a place of conversation/
- Be authentic but sensitive to diverse and changing views
- Find creative solutions
- Think like a designer!

3. How to think like a designer: “ACED”

Audience-centred

Put our audiences at the centre of our work? Real insight: who are our audiences and communities, what do they need?

Experience

Focus - together - on our audiences’ total experience - barriers, benefits and alternatives

Design

Iterative, creative problem-solving inspired by people’s needs





Like a *user-centred* designer

User-centred design

Expert-led design

3. The ACED Blueprint



ADESTE + is a large-scale European cooperation project aimed at expanding cultural participation. 15 partners in 11 cities of 7 European countries will work together for 4 years to bring the public to the center of cultural organizations: among the partners, many theaters, but also museums and

- Creative Europe Project
- Based on human centred design
- A step-by-step approach
- 8 core partners, 50 participants
- Co-designed the “ACED blueprint”
- Systemic change - across organisations
- Towards adaptive audience focus



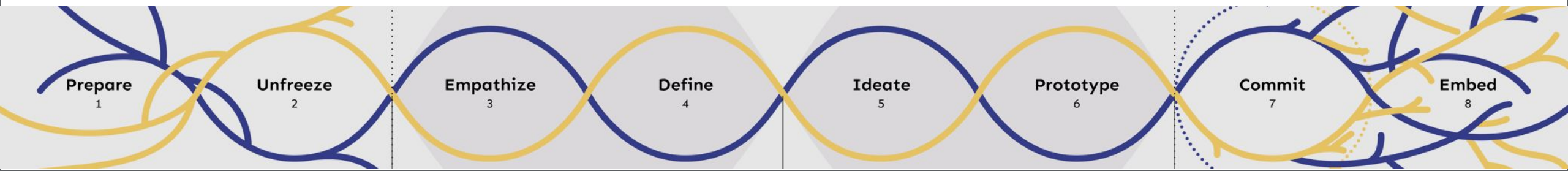
We've long known that cultural organisations who want to become more inclusive, need to work differently. We also know how. But making change is risky, resource-intensive and not always sustainable and so wanted to create a blueprint for confident, people-centred change.

Alessandra Gariboldi, Fondazione Fitzcarraldo.



3. ACED: Designing WITH audiences, step-by-step

- Understand your community
- Build empathy - across the organisation
- Generate new ideas for formats and experiences which “Speak” to people
- Prototype and test small-scale versions
- Gather feedback
- Roll out/ scale
- Stay in touch! Commit to internal and external champions
- ... start again



GRREBRO TEATER

ER SGU WIN EGT

28. FEB. - 12. APR. 2018

ILDE FASIN
Y ASKEMET
A. SOFA ESPESON
JENSEN
TOM NORDHOLM
LARI JENSEN



Barriers research

P
DON'T KNOW WHERE TO BUY THE TICKETS
BORING HUSBAND
NO ONE TO GO WITH CAN'T AFFORD IT
DON'T KNOW WHAT IT IS ABOUT
THE PLAYS ARE TOO LONG
BAD WEATHER
BORING TITLES

What did Norrebro actually do?



NO ONE TO GO WITH

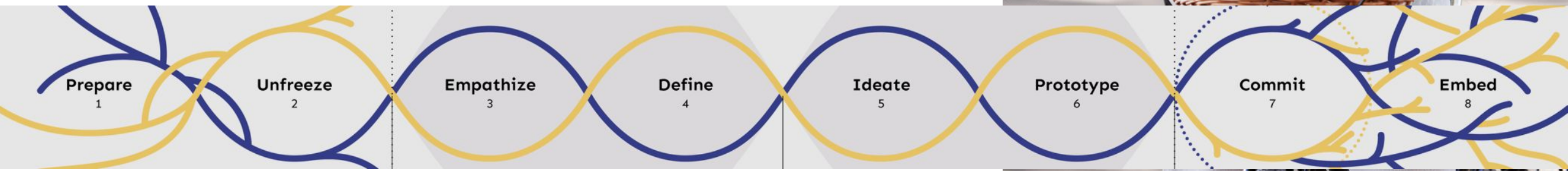


NORREBRO TEE

Using data and conversations to develop a persona, over time...

Charlotte is a middle-aged, part-time librarian living about 3 miles outside the centre of town. She loves theatre but her husband doesn't like going. She sometimes organises trips for her friends but it's hard work and stressful trying to guess what they like - none of them have such an extensive interest.

Since joining good company, she has really enjoyed being able to see all the shows, hassle-free but also welcoming others and bringing her skills and knowledge to help in an around the theatre.



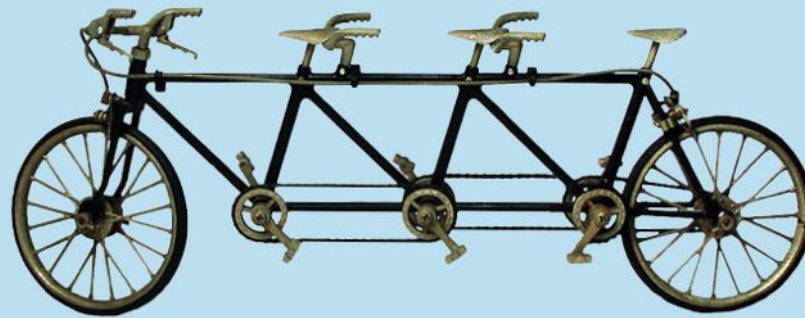
DET GODE SEL

For dig der af og til
nogen at gå i teatret



GOOD COMPANY

For you if you sometimes lack
someone
to come to the theatre with



Features - over time

- Free membership
- Normal ticket prices
- No series booking required
- Reserved area of the theatre
- Optional after-show drinks
- Not a “singles night”

- Changed name from “Thursday Club” to be more explicit
- 300+ people book on for every show
- Developing community
- Can introduce others
- Active in theatre
- Good “hosts”

ENTEN-ELLER

Et anderledes litteraturshow hvor publikum bestemmer.



EITHER OR

Two authors are represented by two experts and four actors. The audience decide who is the most relevant today? 20 €

FYRAFTENSSANG

En musikalsk pause midt i hverdagen.



AFTER WORK SING

Singing together for 75 minutes. 10 €

TÆNKEPAUSER LIVE

Talkshowet der forener videnskab og teater.



REFLECTIONS

Top academics/ authors share their work, read by actors + talk. 20 € +book

LYDBAD

Tag en afslappende tur i lydbølgerne.



SOUND BATH

A meditative experience where you are "bathed" in sound waves 10 €

LATE NIGHT LØRDAG

Showet hvor alt kan ske. Musik, komik og galskab!



SATURDAY NIGHT LATE

Stand-up, music, dance and artistic features. Ticket price 38 € to 45 €.

DET GODE SELSKAB

For dig der af og til mangler nogen at gå i teatret med.



GOOD COMPANY

Performances for audiences going solo
Free membership
Normal ticket price

KLIMAKABALEN

Et klimafællesskab der samler på fremskridt og gode løsninger.



THE CLIMATE RIDDLE

Climate community debate and solution planning. 10 €

FATTIGRØVSKLUBBEN

Investering og økonomi for begyndere.



THE CLUB OF THE POOR

FA salon for people who wants to know more about investment. 10 €

VÆRK & VINYL

Et møde mellem to kunstnere, deres værker og yndlingsvinyl.



WORK & VINYL

Two artists meet and talk about their work and to play records for each other and for the audience
Ticket price 16 €

FAMILIESANG

Fællessang for børn og deres voksne.



FAMILY SONG

Saturday morning children and their grown ups sing together 10 €/6 €.

Last word

**Work together for insights:
your audiences, your community**

**Recognise what's changing for audiences:
Values Tastes Experience**

**Think like a designer - work *with* audiences,
reimagine experiences**

Thank you

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