ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

Increasing the Attendance of Older Audiences

Research Methodology

Research Question

What are best practices and practical lessons to attract and retain older customers?

For the scope of this work, "older customers" are defined as digital immigrants: people who were not born in the digital world but adopted it at a certain point later in life. Concretely, we have focused on people 45 and older, a cohort that is wide and diverse.

To investigate this question, we conducted the following research:

Interviews with 8 organizations

Secondary research to gather:
- Academic research on marketing to older audiences and digital immigrants (28 articles reviewed)
- Best practice analysis of marketing material (online newspaper articles, data charts, research centers)

Past ABA proprietary research

Our interviews covered the following topics:

- Characteristics of the target audience and target segments
- Channels to communicate and attract the target audience
- Strategies regarding how to convey messages and values
- Role of personal contact in the transactional process
- Strategies regarding the retention of customers and how to create loyalty
- General information regarding the organization

Organisations Interviewed

Conducted interviews In-Industry with:	Conducted interviews Out-of-Industry with:

PICCOLO — Head of Marketing

Teatro alla Scala — Senior Marketing Manager

LOUISIANA MUSEUM OF MODERN ART — Marketing Manager

Tate — Head of Audience Insight

Marionnaud PARIS — CMO Grupo IskayPet (Tiendanimal, Kiwoko, Kivet, Clinicanimal), Former CMO of Marionnaud (Madrid)

Carrefour — Head of Group Operational and Digital Marketing (Paris)

Meta — Senior Marketing Manager (San Francisco)

SELFRIDGES&C⁰ — Former Head of Marketing (London)

Lessons Learned

Segmentation

1. Best practice organisations further segment older customer based on their needs, building their understanding through surveys and focus groups

2. They also segment by geography to maximise their marketing ROI as different regions have different age demographics

Building Awareness

3. The best channels to reach older audiences are e-mail, Facebook, You-tube and print – not TikTok, Instagram or through Apps

4. Older audiences like to see themselves (or their 'aspirational selves') in marketing material so that they know they will belong.

5. They also are attracted by different messaging and tend to like more explanatory text in marketing material than younger people.

Increasing consideration

6. Older audiences tend to be attracted by 'dominant' rather than 'emergent' culture – programming is the most important driver of attendance

Lessons Learned (contd.)

Increasing consideration (contd.)

7. Reviews and recommendations are particularly important for this segment in their decision making

8. Older audiences place more weight on the end-to-end experience then younger consumers and are likely to be put off by any step that is difficult or jarring

9. Older audiences tend to have additional requirements – easy access, comfortable seats, larger print, etc.

Increasing conversion

10. Simple purchase journeys increase older consumer's conversion rate

11. Personal contact is valued throughout the experience – particularly at the point of purchase

Leveraging loyalty

12. Older consumers tend to be more loyal and often buy for other members of their family, potentially justifying a higher spend on their acquisition

Report Outline
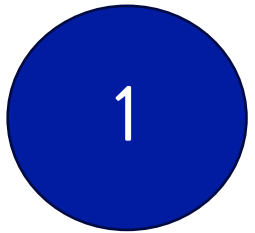
1 Segmentation

2 Awareness

3 Consideration

4 Conversion

5 Loyalty and Repurchase

1. Segment Older Consumers Based on Their Needs

Best practice organisations are much more sophisticated than thinking about age: they segment older audiences by 'needs' or 'jobs-to-be-done'. They frequently survey these audiences to understand how to tailor both marketing and their experiences.

Case Study: Utah Symphony

Using the ZMET technique when interviewing their own audience, they were able to understand what features were considered more important and, ultimately, which were the values the audience saw in the Symphony.

When giving feedback through the ZMET technique, a customer would touch the following points:

1. Product Features (such as acoustics, seating, etc.)
2. Product Benefits (the quality of the experience)
3. Personal Benefits (such as personal growth and spirituality)
4. Values (e.g., inner harmony)

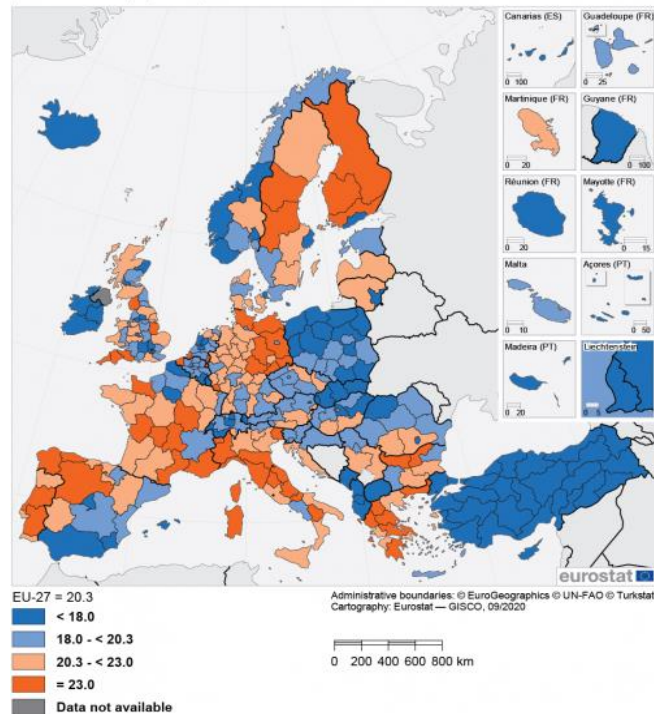Based on the thematic thread that came up, Utah Symphony developed a value-led marketing campaign.

Signals how the symphony supports learning and personal development through challenging and complex performances.

How do you segment your older audiences? Is there a particular segment needs-based segment you are focused on? Do you know what this segment is trying to achieve by coming to your performances?

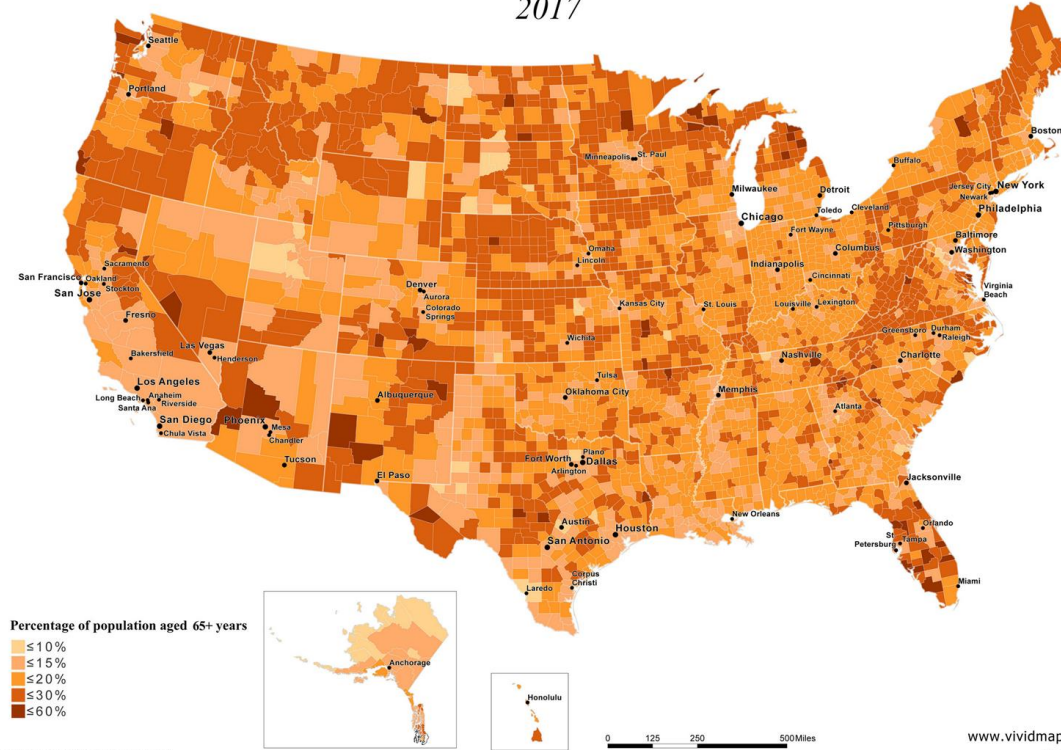# 2. Consider Segmenting by Geography to Maximise Marketing ROI

Different markets (cities or countries) have different age profiles. Best practice organisations optimize their marketing mix – channels and messaging – based on the market demographics to maximize their marketing ROI (e.g. they will use more traditional channels and marketing in a region with a higher portion of older consumers).

People aged =65 years, by NUTS level 2 regions, 2019
(% share of total population)

EU-27 = 20.3
- < 18.0
- 18.0 - < 20.3
- 20.3 - < 23.0
- = 23.0
- Data not available

0 200 400 600 800 km

Note: data as of 1 January.
Source: Eurostat (online data code: demo_r_pjanind2)

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — GISCO, 09/2020

eurostat

Population 65 years and older by county
2017

Percentage of population aged 65+ years
- ≤10%
- ≤15%
- ≤20%
- ≤30%
- ≤60%

Data source: The United States Census Bureau

0 125 250 500 Miles

www.vividmaps.com
Alex Egoshin

What cities are the ideal ones to focus on attracting older audiences? Are there a few cities where it would make to pilot a different approach?

Report Outline
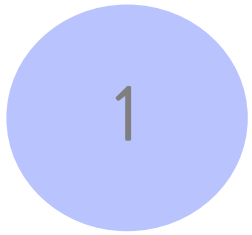
1 Segmentation
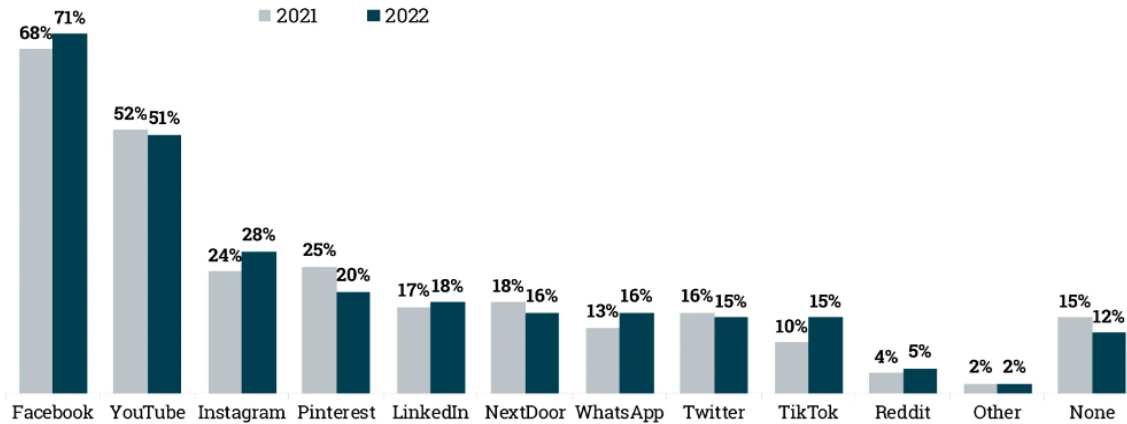
2 Awareness

3 Consideration

4 Conversion

5 Loyalty and Repurchase

3. Reach Older Audiences through the Channels they Use

The channels that older people use (in general) are often different from the ones younger people use. Older consumers tend to be easier to reach through, for example, e-mail campaigns, Facebook, Youtube and print and less through social media platforms like Tik Tok and Instagram or through dedicated Apps.

Social Media Use by US Adults Ages 50+

marketing charts

2021 · 2022

| Facebook | YouTube | Instagram | Pinterest | LinkedIn | NextDoor | WhatsApp | Twitter | TikTok | Reddit | Other | None |
| 68% 71% | 52% 51% | 24% 28% | 25% 20% | 17% 18% | 18% 16% | 13% 16% | 16% 15% | 10% 15% | 4% 5% | 2% 2% | 15% 12% |

Published on MarketingCharts.com in January 2023 | Data Source: AARP

Works well

✓ Direct email

✓ Facebook and Youtube

✓ Print advertisement (in newspapers, transport, etc.)

✓ Paid online advertisement and SEO

✓ Radio

✓ Paid Television (HBO, Dysney + etc)

Doesn't work well

× TikTok and Instagram

× Timed content (e.g., Stories)

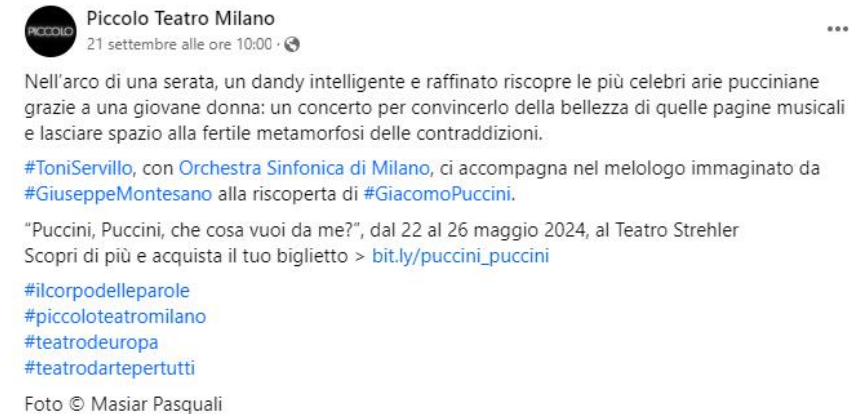× Public Television (BBC, France Télévisions, depends on country trends)

3. Reach Older Audiences through the Channels They Use (cont.ed)

Case Study: Piccolo Teatro di Milano

Right Channel, Right Content

- They segment their audience into two categories: groups and individuals.

- Each category has a dedicated marketing office.

- Groups: Piccolo communicates mainly via phone with the head of the group. Groups might also receive printed marketing material.

- Individuals: Regarding digital content they focus on Facebook posts that are informative and detailed and often coupled with archival images.

- Every time they define digital content, they first think about older audiences:
 - *Would it be easy for them to read it/use it/interact with it?*

Piccolo Teatro Milano
21 settembre alle ore 10:00 · ⊕

Nell'arco di una serata, un dandy intelligente e raffinato riscopre le più celebri arie pucciniane grazie a una giovane donna: un concerto per convincerlo della bellezza di quelle pagine musicali e lasciare spazio alla fertile metamorfosi delle contraddizioni.

#ToniServillo, con Orchestra Sinfonica di Milano, ci accompagna nel melologo immaginato da #GiuseppeMontesano alla riscoperta di #GiacomoPuccini.

"Puccini, Puccini, che cosa vuoi da me?", dal 22 al 26 maggio 2024, al Teatro Strehler
Scopri di più e acquista il tuo biglietto > bit.ly/puccini_puccini

#ilcorpodelleparole
#piccoloteatromilano
#teatrodeuropa
#teatrodartepertutti

Foto © Masiar Pasquali

Toni Servillo e l'Orchestra Sinfonica di Milano nel melologo di Giuseppe Montesano che guida il pubblico alla riscoperta di Puccini.

Puccini, Puccini, che cosa vuoi da me?

22 — 26 MAG
TEATRO STREHLER

What is your presence in the traditional channels that most older people use?

4. Use Imagery that Makes Older Consumers Feel that They 'Belong'

Older people want to see imagery that includes people like them (or perhaps like they would like to see themselves) so that they feel that they will belong.

Spots like Amplifon's and Costa Crociere's stresses how life has *improved* and how *happy* their customers are. Moreover, they often show the customers with their family, a central *value* in their lives.
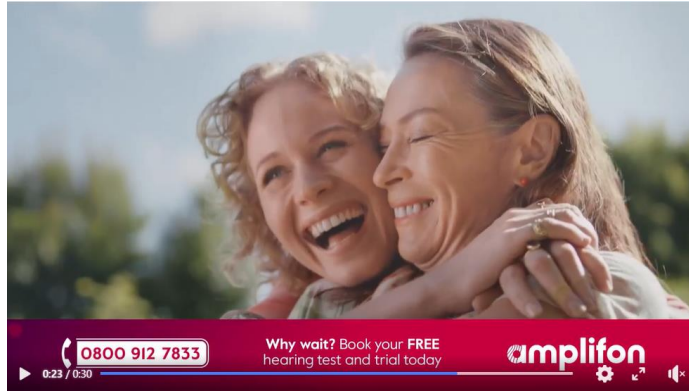
Fashion brands such as Zara often have older models acting exactly like younger ones, transmitting *confidence and elegance*.

In Skecher Italy's case, the testimonial is a famous TV daytime presenter who is seen as *comforting and authentic*.

Retirement homes often depicts their residents as *joyful, active and in groups*, presenting their services as a life experience.

5. Use Messaging That Will Appeal To This Segment

The messaging that appeals to older people is (in general) not necessarily the messaging that appeals to younger people. While the young may be very attracted by 'secret', 'exclusive' and 'edgy', older consumers tend to be attracted more by messaging that makes them feel positive, younger and at the same time comfortable.

Some good practice when marketing to older customers:

- Represent them…but in a good way: Older people are rarely represented in advertisement, especially when they are not the main target of the company. Moreover, they are often depicted as sick or lonely, which is commonplace and unnerving. Targeting evidently old people only help polarize the division between young and old, which makes those marketing practices less effective.

- Use an upbeat tone: as per the previous point, 50+ costumers still have active and satisfactory lives. If it is true that with age, physical and mental issues might arise or get worse, it is also true that such events should not define one's identity.

- Make it memorable: If older people can relate to what they see and read, it is easier that they will remember the content, the product and the brand. While fun images and sketches may make them laugh, a warm, comfortable ad is more likely to be effective

- Show your (and their) values clearly: older consumers often see their family as their anchor. Similarly, they are more inclined towards kindness, generosity and similar values

- Narrate them a story: digital immigrants are less attracted by pictures and more attracted by texts or narrated videos. Even better if the text is detailed, informative, engaging and help them to delve into your product, your brand and your values.

Does your imagery and messaging appeal to an older demographic?

Report Outline
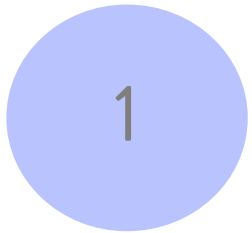
1	**2**	**3**	**4**	**5**
Segmentation	Awareness	**Consideration**	Conversion	Loyalty and Repurchase

6. Programming is the Most Important Driver of Attendance

While perhaps obvious, the most important factor in deciding whether to attend is whether the performance or exhibition is appealing to the market you are targeting. Older consumers tend to bias more towards 'residual' and 'dominant' culture, and less to 'emergent' culture.

One of the factors some cultural organization use in shaping performances and exhibitions is the demographics and interests of the local audience. This culture can be defined using the useful framework of:

- Emergent : the cutting-edge contemporary art that focuses on current debates and issues.

- Dominant: what is perceived as current culture.

- Residual: Culture from previous eras that still influences current society.

7. Reviews and Recommendations are Critical in Their Decision Making

Reviews are particularly important to older people in making their decisions - as are recommendations from their peers.

- When older consumers shop for something new in an unfamiliar area, they tend to seek guidance from external sources.

- They often rely on the advice of family and friends, as well as insights from online reviews and traditional media.

- A report by Ogilvy showed that word of mouth is the most influent (74%), followed by retailers and store visits (69%) and YouTube videos (64%).

Case Study: Sephora

Customers not only have the option to leave reviews on the website but can also provide additional information such as their age and skin type. This added context allows other consumers to efficiently filter through the numerous reviews and identify those that closely align with their specific needs and circumstances.
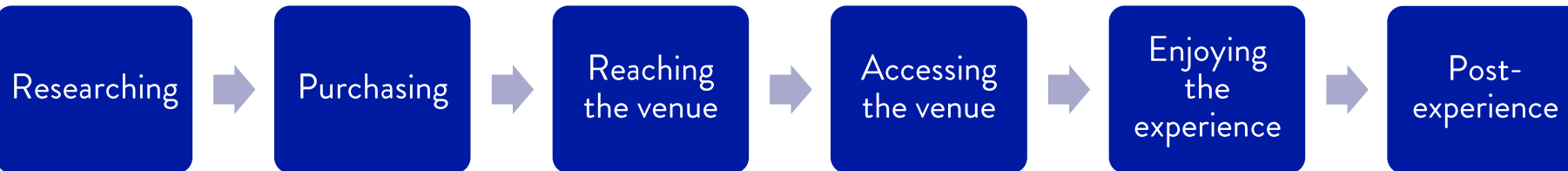
8. Ensure the End-to-end Experience is Comfortable and Easy

Older consumers are also more likely to value the end-to-end experience and judge it primarily on how they 'feel' at the end of it. They are less forgiving than younger consumers who may be able to more easily accept standing in lines, not having great food, etc.

"I tried to book tickets 3 times last week, after I gave the authorization for the payment to my bank, their website kept running for 10min and never sent any confirmation. I was debited 3 times with no receipt or tickets" – Museum visitor

"The theater does not have an elevator and stairs can be a nemesis for seniors and people with mobility challenges" – Theatre spectator

"I really didn't like this area at all. Felt very unsafe as lots of people dashing around. I felt on high alert the whole time I was around this area" – Theatre spectator

Researching → Purchasing → Reaching the venue → Accessing the venue → Enjoying the experience → Post-experience

"The person at the box office was not helpful at all. He knew the dates of the shows but nothing about their content" – Theatre spectator

"Signs point you in the right direction, but they disappear shortly afterwards. Even in front of the gallery, there are no entrance signs!" – Museum visitor

"The museum was overcrowded and with very limited air conditioning. Accommodations for senior citizens or handicapped are limited at best– Museum visitor

Reviews source: Tripadvisor

9. Provide the Services and Amenities Older Consumers Need

The experience that an older person wants at an event can differ from what a young person is looking for. Factors like parking, safety, being able to book specific seats, access, etc. tend to be disproportionately important.

Easy access

Comfort

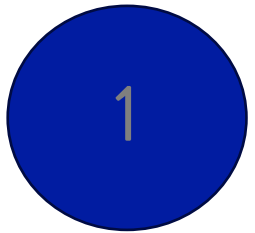Attention to physical impairment

Food, beverages and restrooms

Is the end-to-end journey one that would give older people a good experience? Or does it work for the specific sub-segment you are focusing on?

Report Outline

1 Segmentation
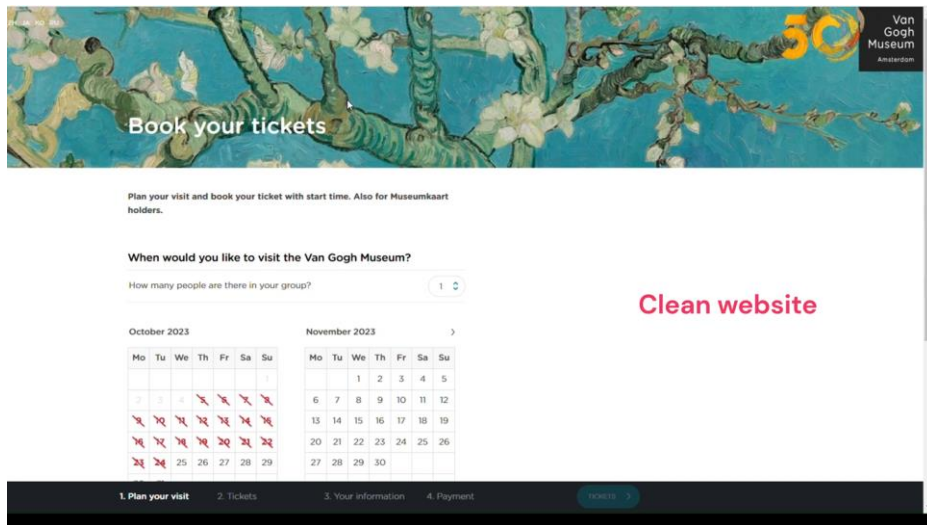
2 Awareness

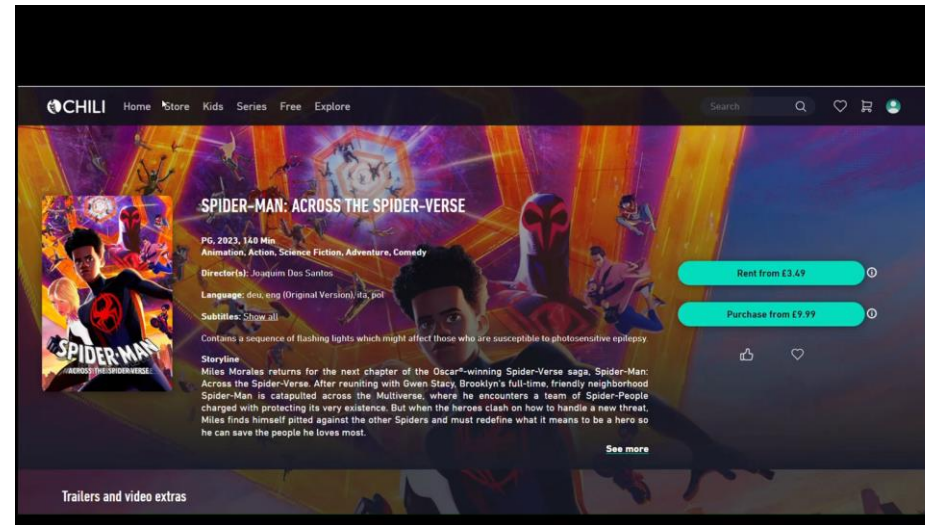**3** Consideration

4 Conversion

5 Loyalty and Repurchase

10. Provide a Very Simple and Clear Purchase Journey

A simple, short, easy-to-understand purchase journey is crucial for this demographic. Anything which is overly complicated, requires navigating many pages, downloading an App, etc. is likely to drive significant abandoned journeys.

✓Easy to read and to use

✓Key info repeated to avoid confusion

✗ Too many options
✗ Font size too small

Images sources: Van Gogh Museum, Chili, Ryanair

11. Provide Personal Contact throughout the Experience

The ability to speak to a person is important if things are not working in the purchase or if they have questions. This is also true of the experience at the venue itself.

As a result of a focus group with +60 customers Carrefour supermarkets is considering to offer a dual checkout experience, comprising self-service and assisted tills. The latter are designed with their older customers in mind, providing them with the opportunity to engage in friendly conversations and take their time, free from the rush of modern shopping.

Tickets for events at the Piccolo Teatro di Milano are available through various convenient channels, such as the traditional box office and a newly introduced in-house phone support service. They stopped outsourcing this service to a call center to avoid losing customers. This addition ensures that their valued patrons receive not only accurate and helpful information but also a warm and personalized interaction with the theatre's team.

BBVA App has enabled a simplified view option so that, at a single glance, seniors can quickly perform basic account queries, talk overt the phone with their personal account manager if needed as well as other services. In addition, in this version the font size is 20 percent larger to improve readability.

Report Outline
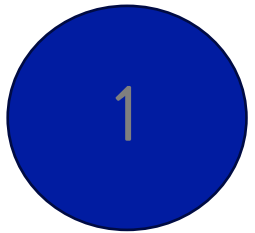
1	2	3	4	5
Segmentation	Awareness	Consideration	Conversion	Loyalty and Repurchase

12. Understand the Lifetime Value of Older Consumers in Determining How Much to Spend on Acquisition

The older demographic tends to be more 'loyal' once they find an experience they enjoy and will be good ambassadors to their peers. It may therefore be possible to invest more in the acquisition of these consumers than of more transactional younger consumers.

Case Study: Major Performing Arts Organization

- 70% of its audience is 45 years old and above. Most of this percentage has been attending the opera house performances for more than 10 years whereas the minority has been attending at least for 3 years.

- Subscribers and returning audience (those who have attended at least 4 performances) make up 40% of the yearly audience.

- After the theatre's website and Youtube channel, Facebook is the most followed channel.

- Sense of belonging is among the most important motivations among older audiences.

What acquisition cost can you justify for an older audience member?

ADVISORY BOARD for the ARTS

Transforming Arts Organizations Worldwide

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