



Millennials Are Not a Monolith:

Experiences from One Group of Performing Arts Organizations' Audience-Building Efforts


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A brief of the
*Building Audiences for Sustainability:
Research and Evaluation study*

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 The University of Texas at Austin
College of Fine Arts

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Lyndon B. Johnson School
of Public Affairs

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“THAT IS A GROUP THAT IS NOT ENGAGED WITH US . . . and it was important, particularly with the rising demographic of the millennials, that we engage that group.” These words from a theater director reflect his concern about attracting millennial audiences—one that is prevalent in the nonprofit performing arts. His organization was one of 25 performing arts groups awarded grants to expand and engage audiences as part of The Wallace Foundation’s Building Audiences for Sustainability (BAS) initiative. As part of the initiative’s approach to audience building,¹ participants were required to define and focus their efforts on a particular target audience. Millennials were the most frequently chosen group.² Among the widespread reasons for their choice: Too few young patrons were emerging to replace current and aging audiences, and organizations therefore needed to tap into the large millennial population to create a pipeline of younger audiences. Further, many felt proactive measures were needed to create this pipeline because declining arts education in schools had left millennials with little prior exposure to their art forms. As a marketing director of a dance company said, “If you don’t figure out how to engage the millennials, you’re going to eventually see your audience diminish, because they are the audience of the future.”

But is a demographically-defined age segment, in this case, millennials, necessarily a meaningful target group for the purposes of audience building? Interim findings from our independent evaluation of these organizations’ experiences suggest caution about making this supposition. They point to the need for further refinement and careful attention to generalizations and stereotypes that may underlie approach-

es to millennials as a target group for audience building. It is one thing to focus on attracting millennials because of their age, but another to expect that commonalities of age translate into unique or uniform motivations, tastes, and behaviors. Thus, our results suggest that targeting millennials as a group may better be seen as a starting point for further thought and exploration. This brief shares experiences of BAS participants in the spirit of provoking questions, rather than giving answers. The project’s final report will address the organizations’ audience-building efforts, including those aimed at attracting younger audiences, through a more comprehensive exploration.

Before turning to our discussion, a preliminary word about timing is in order. The BAS initiative started in 2015 and ended in 2019. Little could anyone have imagined that soon after the initiative concluded, the COVID-19 pandemic would shutter performances across the country, in 2020. Although prior challenges may pale in the face of the pandemic, along with the urgent national conversations on racial injustice, nonprofit performing arts organizations were facing challenges even before the current crisis, including declining or stagnant audiences across multiple art forms.³ The current crisis only serves to heighten the significance of these challenges. Some of the face-to-face strategies referenced by interviewees are not feasible at this time. Yet engaging audiences is not only about what institutions do; it is also about how they understand their audiences, which in turn informs their strategies. We hope that this brief, which raises questions about relating to audiences on the basis of their ages—and perhaps on the basis of demographics more generally—may help.

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Millennials: Internal Differences

As participants found, millennials are not a monolithic group. They encompass internal heterogeneity that includes but is not limited to other demographic differences, lifestyles, and tastes. For instance, one theater initially said, “Great, we’ll go after that target!” However, a staff member recalled:

What we learned very quickly is that there are at least two life stages within that [millennial range]. There are the young ones that are just out of college or out of high school. And then there are the ones that have already started having families. And they are up in their late twenties, early thirties. And their needs are different. . . . Like all audiences, you’re not going to have one-size-fits-all.

Asked whether the organization would choose millennials as their focus were they to do it again, he thought they would, but might narrow the age range within the group.

Age is not the only source of heterogeneity among millennials, as illustrated by a dance company that did focus on a narrower age segment. One of the company’s interests was in the potential impact of different pricing strategies on attracting a millennial target. But as one interviewee from the organization observed, the financial capacity of an unpaid intern “just out of school” will not be the same as one who is a “first-year associate at a law firm.” In his view, a “one-size-fits-all” approach to engaging millennials will not work, so he feels that organizations need to make choices about where and how to focus their efforts.

Another organization encountered heterogeneity associated with lifestyle. They sought to attract millennials who might have little prior exposure to the organization by offering performances promoted through social media and occurring in more informal settings around town. The institution already had an affiliated group of young patrons, and considered coordinating with some of their events to attract other millennials. One interviewee explained, however, that this group turned out to be “more like young [community] socialites, shall we say. . . . They just seemed like a different social subgroup within the millennial population that is really not what we were trying to reach.” Meanwhile, at another presenting organization, an interviewee expressed frustration over the difficulty of predicting what their young target audience would attend, because “there’s that certain pocket of the audience that really wants to experience something new and different. There’s another that wants to . . . see artists that they already know and recognize.” Heterogeneity of tastes, lifestyles, and financial means all have clear relevance for audience-building efforts.⁴

Millennials and Other Age Groups: Commonalities

To this point we have focused on heterogeneity among millennials. Similarities encountered between millennials and other groups further call for caution against assuming that millennials are a meaningful group for audience building.

For instance, the director of one dance company recalled that originally,

We thought that we would have to have programming geared towards what they, the millennials, like. . . . And it turns out when you surveyed them afterwards, that they, when they get to the theater, they like the same things that everybody else likes. They like the classics. They like the new stuff.

One theater offered immersive presentations intended to attract millennials, but their thinking evolved as follows:

We were really focused on younger audiences. But then we started talking about our audiences as adventurous, because that adventurousness . . . can be associated with age, but it is not exclusively related to age. And I think we are finding that there are plenty of Gen Xers and boomers who love this work and who are excited by this [immersive] work. And we welcome them.

They continued with this programming. As this interviewee explained, “A big part of our goal is to reach that demographic. But it’s not the endgame. The endgame is creating an interesting and new and vibrant following.”

An interesting contrast is the experience of another organization that introduced new programming. This university-affiliated arts presenter did not target millennials *per se*, but focused specifically on students 18–22, an age range falling mostly within millennial boundaries for much of the initiative. An interviewee recalled:

We felt, let’s build a whole programmatic strand that’s only about really cool cutting-edge work made by younger people. That totally flopped. Those things just didn’t need to happen. . . . They were inauthentic to our organization.

The organization discontinued the program, concluding that the problems were not with current programming. One problem was that ticket prices were “astronomical” on a student budget. The organization therefore created a low cost and flexible student pass, with a packet of tickets redeemable for any show. Passes “sold out” and student usage confirmed “that many of our students really wanted to go to all the same things that our top subscribers wanted to go to.”

Another organization observed that the social experience surrounding a performance was important for millennials and boomers alike: “The build-up, the going out to eat, the dressing up . . . getting intermission drinks, like, all of these things are just as important as the actual performance.” The organization’s director came to feel that “the key thing is not even to worry about the millennial or baby boomer thing.” He said,

We’ve learned really that there’s one audience, because even within those two segments there are four or five different approaches. And what people want to get out of going to [performances] cannot be wrapped up by the phrase “millennial” or “baby boomers.”

A staff member thinks they need to find projects with broader appeal because “We don’t feel like as a company we can do so much niche marketing and niche programming. It’s just not really sustainable for us.”

There was one thing that virtually everyone viewed as imperative for approaching a millennial target audience: expanded use of digital and social marketing vehicles. A symphony orchestra interviewee succinctly said, “Millennials like their phones.” Perhaps, but millennials may not be the only ones. Asked what she had learned about their audience over the course of the initiative, an interviewee from an arts presenting organization, said:

Having a lot of technology sort of makes things easier. Everybody responds well to that, whether they’re millennials or baby boomers. I mean, we find that a lot of our baby boomer audiences are attached to their iPhones and . . . purchasing tickets on their phones as well.

Concluding Thoughts

As previously mentioned, the BAS initiative was informed by the integrative approach to audience building. The RAND Corporation researchers who developed the approach criticized previous models they viewed as overly focused on audience demographics, arguing, “This focus on socio-demographic factors rather than on the factors that motivate participants provides little help to arts institutions, since institutions typically have little or no way to influence background characteristics.”⁵ Nonetheless, a majority of arts organizations in their survey⁶ did identify their target populations in demographic terms. The RAND report was published in 2005. Close to fifteen years later, when charged with identi-

fying a target audience, the organizations in the BAS initiative also mostly turned to demographics. Further, whether organizations can “influence background characteristics” of others or not, arts organizations are being called upon to give attention to how they can change themselves. This applies to age, with regard to maintaining ongoing relevancy and engaging with social media. And it certainly applies with respect to race and ethnicity, as arts organizations are challenged to change current practices in the interest of greater diversity, equity, and inclusion among their boards, staff, and artists as well as audiences.

So, to return to our opening question, is the demographically-defined age segment “millennials” necessarily a meaningful group for the purposes of audience building? The experiences of these BAS initiative participants suggest that the search for “millennial” audiences is at best a starting point for further thought. There are, after all, more than 70 million millennials in the United States.⁷ Our results suggest that a focus on attracting millennials should, at a minimum, be followed up with the question, “Which ones?” The issue is not with organizations trying to engage this demographic group, which many found underrepresented in their current audiences. Instead, our results underscore that it is one thing to define an audience in demographic terms, but another to assume that a shared demographic characteristic will translate into uniformity of motivations and behavior. While this perspective may heighten complexities for audience building, it also opens up opportunities. As arts organizations seek to enlarge their millennial audience, they may want to keep in mind that as the world changes, the preferences and lifestyles of older individuals should not be assumed to remain stagnant. Recognizing that age groups contain considerable internal heterogeneity as well as cross-cutting similarities may help organizations to better target their efforts, and to realize new ways of connecting to all audiences in a changing world.

About the Initiative, Participants, and this Study

From 2015 to 2019, The Wallace Foundation supported its Building Audiences for Sustainability (BAS) initiative, awarding close to \$41 million in grants to performing arts organizations to try to engage new audiences while retaining existing ones, and to see whether these audience-building efforts contribute to organizations’ financial health. The organizations included eight theater companies, six performing arts presenters, four opera companies, four symphony orchestras, and three dance companies. Of the 24 for whom the information is available, all had operating expenses in excess of \$1 million, and over half had operating expenses in excess of \$10 million. The majority defined their target audience for the initiative demographically, usually by age (mostly millennials), some by race/ethnicity, and in a few cases by

a combination of the two. Others defined their audience in “psychographic” terms (mostly “adventurousness”), targeted infrequent attendees, or tried to attract audiences to a particular type of work. After making the 2015 awards The Wallace Foundation commissioned and funded The University of Texas at Austin to conduct an independent evaluation of the implementation and outcomes of the initiative’s audience-building efforts. This brief is based on interviews with BAS participants between late 2015 and 2018 (one round of interviews at the start, and a second round at or past the midpoint of their efforts). Interviewees were assured that interviews were confidential, strictly separate from monitoring or reporting to the foundation, and that individual interview results would not be shared with The Wallace Foundation.

Endnotes

1. The initiative was informed by the integrative approach to audience building, developed by RAND Corporation researchers through research sponsored by The Wallace Foundation. See Kevin F. McCarthy and Kimberly Jinnett, *A New Framework for Building Participation in the Arts*. Santa Monica, CA: RAND Corporation. 2001. https://www.rand.org/pubs/monograph_reports/MR1323.html.
2. The Pew Research Center defines “millennials” as those born between 1981 and 1996. Michael DiMock. *Defining generations: Where Millennials end and Generation Z begins*. <https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/>. By this definition, millennials would have been between the ages of 19 to 36 in 2015, at the start of the initiative. Initiative participants used varying parameters that generally fell in or around this age range, though some set a younger or older boundary (e.g., 18–34, 25–40).
3. *A Decade of Arts Engagement: Findings from the Survey of Public Participation in the Arts, 2002–2012*, NEA Research Report Number 58 (Washington, D.C.: National Endowment for the Arts, 2015), <https://www.arts.gov/sites/default/files/2012-sppa-jan2015-rev.pdf>; and *U.S. Trends in Arts Attendance and Literary Reading: 2002–2017: A First Look at Results from the 2017 Survey of Public Participation in the Arts* (Washington, D.C.: National Endowment for the Arts, 2018), <https://www.arts.gov/sites/default/files/2017-sppapreviewREV-sept2018.pdf>.
4. Along these lines, an analysis of national survey data found that knowing peoples’ educational attainment is more useful than knowing their age to predict their arts participation. Mark J. Stern. *Age and Arts Participation: A Case Against Demographic Destiny*, NEA Research Report Number 53 (Washington, D.C.: National Endowment for the Arts. 2011), <https://www.arts.gov/sites/default/files/2008-SPPA-Age.pdf>.
5. Kevin F. McCarthy and Kimberly Jinnett, *A New Framework for Building Participation in the Arts*, page 21.
6. The RAND survey comprised 102 Wallace Foundation (then Wallace-Reader’s Digest Funds) and Knight Foundations grantees, including visual and literary as well as performing arts organizations. The authors classified the institutions into three groups: those with a community focus, those focused on engaging individuals in the creative process, and those focused on supporting the canons of a particular art form. The majority of organizations in each group defined their target audience groups demographically (Kevin F. McCarthy and Kimberly Jinnett, *A New Framework for Building Participation in the Arts*, page 81).
7. Richard Fry, *Millennials overtake Baby Boomers as America’s largest generation*. Fact Tank: News in the Numbers. Pew Research Center. April 28, 2020. Para 1. <https://www.pewresearch.org/fact-tank/2020/04/28/millennials-overtake-baby-boomers-as-americas-largest-generation/>.

About the Author

Francie Ostrower, Professor in the LBJ School of Public Affairs and College of Fine Arts at The University of Texas at Austin, Director of the Portfolio Program in Arts and Cultural Management and Entrepreneurship, and Senior Fellow at the RGK Center for Philanthropy and Community Service, is Principal Investigator of the *Building Audiences for Sustainability: Research and Evaluation* study.

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