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## Executive Summary

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# Audience Segmentation: Patterns and Profiles of Cultural Participation in the Basque Autonomous Community (BAC)

Analysis of Results  
from the 2024 Cultural  
Participation Survey

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# Executive Summary

Carrying out a large-scale cultural participation survey provides a comprehensive snapshot of the behaviours and opinions of the population in a socially significant area such as culture. These are social practices that, broadly speaking, are crucial for both personal and societal development.

A deep understanding of participation patterns, motivations, and the barriers people face in accessing culture helps to identify areas for improvement and potential actions. Moreover, this kind of study reveals inequalities and access gaps that must be addressed to ensure a more inclusive and accessible cultural offering.

For this reason, the Cultural Participation Survey of the BAC is a strategic initiative of the Basque Cultural Observatory. Likewise, this report, drawing from the wide range of insights offered by the data, focuses specifically on identifying patterns and profiles of cultural participation.

What types of participation patterns exist in the BAC? What are the characteristics of the people who follow these patterns?

These are the key research questions. The aim is to gain a population-based understanding of the audience, useful for guiding and shaping policy through a holistic view of the citizenry.

To this end, the report begins by presenting the conceptual and methodological foundations for a sound reading of the results. The main section then sets out the detected participation patterns and provides detailed characterisation of the people within each group. This is the core of the study and concludes with a synthesis and overall interpretation of the results, followed by a short final section highlighting key takeaways.

# Profile Sheet

<b>Voracious omnivores</b>		<b>Prototype of avid cultural enthusiasts</b>
<b>8,64 %</b> of the population	<b>€113.95</b> Average monthly cultural expenditure	<b>They do a lot, and very varied</b>

## Cultural Profile

Very high participation in all cultural activities, both receptive and active.

Regular attendance at dance, museums, and art galleries.

Standout attendance at theatre, concerts, and cinema.

Strong engagement in amateur artistic practices and associations.

Frequent use of libraries and intensive reading habits.

Very active in both receptive and creative digital practices.

## Sociological Profile

Highly educated, with a large proportion holding university degrees. Intermediate income level.

Culture is important to them - they are motivated, engaged, and culturally identified. They would participate even more if there were greater cultural offerings.

Extensive exposure to culture during childhood. Parents had high educational attainment.

Widespread interest in sport, bars, and online series.

An intergenerational group but skewed towards younger adults. Mostly living in cities and large towns.

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<b>Relaxed omnivores</b>		<b>A varied cultural menu with an emphasis on reading</b>
<b>8,28 %</b> of the population	<b>€75.46</b> Average monthly cultural expenditure	<b>They enjoy almost everything, in any format</b>

### Cultural Profile

Very high cultural participation, but less intense than the voracious group.

Low participation in dance, lectures, and art galleries.

Very frequent reading and extensive use of libraries, not just for borrowing books but also attending events.

High engagement in digital practices, mainly receptive formats.

Moderate attendance at theatre, cinema, concerts, and museums.

Important but less prominent amateur artistic activity and associational involvement.

### Sociological Profile

High proportion of university-educated individuals.  
Intermediate income level.

Culture provides them with personal fulfilment and identity.  
They would participate even more if there were greater cultural offerings.

Positive impact of receptive and especially active cultural experiences in childhood.

Common interests include sport, walking, bars, and online series.  
Above-average involvement in domestic work.

An intergenerational group but skewed towards younger adults.  
More likely to live with children.

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<b>Active and connected</b>		<b>100% digital and audiovisual consumption</b>
<b>14,6 %</b> of the population	<b>€76.46</b> Average monthly cultural expenditure	<b>They watch and create culture, including online</b>

### Cultural Profile

Moderate and balanced participation between in-person/analogue and digital formats.

Reading levels vary within the group.

Fully digital, ranging from receptive to active engagement, and from traditional to modern content.

Offline, they show high interest in cinema and concerts.

Strong tendency towards amateur artistic practice and involvement in associations.

Occasional attendance at theatre and museums.

### Sociological Profile

Culturally active childhood. Parents with medium educational attainment.

Place higher-than-average personal value on culture. They do not face psychological or knowledge-based barriers. They would participate more if they had someone to accompany them.

They find it harder to make ends meet. Below average income. High level of education.

Highest average engagement in paid work. Least amount of free time overall.

Youngest group overall. Higher proportion of Basque speakers (euskaldunes). Fewer have children.

Broad range and intensity of other interests. Widespread interest in social media and online series. Strong interest in sport, bars, streaming, and video games.

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Moderate classical consumers		The cultural middle ground
<b>26,06 %</b> of the population	<b>€77.41</b> Average monthly cultural expenditure	<b>Neither too much nor too little, mostly in-person and receptive, including some digital</b>

### Cultural Profile

Occasional participation focused on in-person and mainstream activities such as concerts, cinema, and theatre.

Virtually no association membership.

Occasional visits to museums.

Reading habits vary.

Low but present engagement in artistic and digital creative practices.

Digital activity largely limited to receptive formats.

### Sociological Profile

Intermediate position in terms of inherited cultural capital.

Above-average likelihood of living with children. Slightly higher proportion of men.

Good average education level, with a majority of university graduates. No major financial difficulties.

Middle-ranking on psychological characterisation indicators.

Predominantly adults aged 35 to 54. Reside in major cities and urban areas.

Common interests include sport, online series, social media, bars, and walking. Highest average involvement in paid work.

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Occasional analogue		Low and analogue consumption
<b>6,72 %</b> of the population	<b>€56.45</b> Average monthly cultural expenditure	<b>Some diversity, but infrequent participation</b>

### Cultural Profile

Low-intensity cultural engagement, mostly analogue.

Minimal digital activity.

Infrequent reading.

Little involvement in amateur artistic or associative practices.

### Sociological Profile

Limited cultural exposure in childhood.  
Parents with low levels of education.

Average valuation of culture.  
Tend to be reasonably well-informed about culture.  
Average psychological and knowledge-based barriers.

Highly mixed educational backgrounds, though mostly secondary-level qualifications.  
Few financial problems, average income.

More free time than average - low levels of paid work, but above average in domestic work.

Large share of people aged 55+, especially 64 and older.  
Higher proportion of women.

Above-average interest in walking and watching television.

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Receptive digital users		Digital, audiovisual, and occasional readers
<b>25,13 %</b> of the population	<b>€40.53</b> Average monthly cultural expenditure	<b>They stand out in digital consumption</b>

### Cultural Profile

Frequent use of digital media for receptive consumption.

No involvement in associations.

Very low cultural participation in in-person activities, mainly limited to cinema, concerts, and to a lesser extent, theatre.

Minimal engagement in active digital formats.

Very low reading intensity.

### Sociological Profile

Low cultural exposure during childhood.

Among the least culturally active groups, they are notably younger.

High proportion of vocational education, followed by university-level qualifications.

They feel that art and culture are not for people like them. Low levels of cultural awareness.

More pronounced financial difficulties, although they are not the lowest earners.

Most common interests include social media, online series, and walking.

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Non-audience		Very distant group with little interest
<b>10,57 %</b> of the population	<b>€14.95</b> Average monthly cultural expenditure	<b>Disengaged with clear and persistent barriers</b>

### Cultural Profile

Minimal or no engagement in any form of cultural participation.

Very occasional attendance at concerts and some anecdotal amateur artistic practice.

Extremely low attendance at theatre, dance, or cinema.

Some digital consumption, but mostly passive and derived from analogue habits (e.g., reading online, viewing shows or exhibitions online).

Relative to their very low cultural engagement, the likelihood of reading is slightly more prominent.

No involvement in associations or active digital practices.

### Sociological Profile

Lowest level of cultural exposure during childhood.

Most significant psychological and knowledge-based barriers. They would not participate more even if cultural offerings were closer. Price is not a barrier.

Mainly individuals with no education or only primary/ compulsory secondary education. Significant financial hardship and the lowest income levels.

They have the most free time (due to age, productive work occupies them very little, though they report above-average domestic work).

Largest proportion of individuals aged over 64. Higher proportion of women.

Above-average interest in walking and watching television. They do not use social media and do not spend time in bars.

# Key Findings

This report has presented the results of the analysis of the 2024 Cultural Participation Survey in the BAC, with the aim of identifying population-level patterns and profiles of cultural participation. Understanding these differences and preferences regarding art and culture among the population helps inform cultural policy, supporting it with empirical evidence and improving the effectiveness of its objectives.

The segmentation of cultural audiences in the BAC reveals seven distinct profiles based on intensity and type of participation, from *voracious omnivores* to the *non-audience*. This classification highlights not only who participates more, but also how they do so: through a greater or lesser variety of activities, and through in-person, digital, active or receptive formats. The three most active groups account for 31.5% of the population, while the three least active make up 42.4%.

Each profile is shaped by a specific combination of cultural practices, not merely by overall volume. Some groups are predominantly digitally oriented (*receptive digital only*), others combine analogue and digital formats (*active and connected*), while some focus almost exclusively on traditional in-person activities (*moderate classical consumption or occasional analogue users*). This variety suggests that access type, habits, and motivations are just as important as the number of cultural activities undertaken.

Different sociological factors stand out as structuring elements of the profiles, among which the following stand out:

- Age as a life-cycle factor: determines or condenses aspects related to available time, digital skills, family context and economic capacity. It is a significant driver that must be understood in this light.
- Inherited cultural capital: Exposure to cultural practices in childhood is strongly associated with higher adult participation. This is likely due to the development of skills, aesthetic appreciation, and the absence of psychological barriers.
- Psychological and knowledge barriers (low “cultural self-esteem” and lack of artistic “literacy”). These variables are highly relevant explanatory factors and are not always taken into account. They are strongly correlated with low participation, sometimes independently of education level or other key variables.

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Other factors such as income, gender or city size have more specific or limited effects. An important observation, which adds a degree of complexity, is that there are factors that do not relate linearly to cultural participation: some variables and categories within them affect certain profiles but not others. That is why the detailed **profile sheets** and a comparative or cross-sectional reading of them are crucial for deeper understanding. Often, it is the contrast between groups that helps highlight defining features.

The results offer strong potential to inform strategies for audience development. Audience segmentation provides a basis for targeted strategic actions. As a guideline, based on the identified profiles, it is possible to devise ad-hoc measures for each case:

- Voracious omnivores (8.6%): Already very active, they can be strategic allies in an active role, as “prosumers”.
  - Offer them specialised programming, co-production spaces and opportunities for cultural mediation or volunteering.
- Relaxed omnivores (8.3%): Highly participative, but less intensively than the voracious group.
  - Encourage continuity and loyalty through hybrid proposals (in-person/digital) and facilitate family or group access.
- Active and connected (14.6%): Young, active and digital.
  - Strengthen their role as creators by involving them in participatory programming, digital content creation and online communities, and help them act as ambassadors to other young people.
- Moderate classical consumption (26.1%): A large and stable group, but with low involvement.
  - Diversify conventional offerings and introduce mediation to encourage new practices (e.g. pre-event workshops, guided visits).
- Occasional analogue participation (6.7%): Low participation, limited to the most traditional.
  - Strengthen aspects related to accessibility, work at a local level, and provide low-commitment introductory experiences.
- Receptive digital only (25.1%): Young, connected and digitally engaged audience, but distant from in-person practices.
  - Create bridges from their digital content consumption and promote group-based experiences.
- Non-audience (10.6%): Disengaged and facing multiple barriers, mostly older adults.
  - Work through mediation, community initiatives, and crossover with other fields (education, health, social services).