

DRAWING THE CROWD:
AN AUDIENCE RESEARCH ROADMAP
FOR STREET ARTS, CIRCUS AND SPECTACLE
IN IRELAND

ANNETTE NUGENT with ISACS
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WHAT WE ARE TRYING TO ACHIEVE

The Irish Street Arts, Circus and Spectacle Network (ISACS) is Ireland's leading support and advocacy organisation for the development of street arts, circus and spectacle in Ireland.

Similar to trends in European countries such as France, Germany and the Netherlands, the street arts sector in Ireland – as in the UK – has had a growing presence in recent years. ISACS believes the sector is uniquely placed to work with the Arts Council in implementing its new ten-year strategy (2016-2025), *Making Great Art Work*, particularly in achieving its overarching strategic public engagement goal that “*more people will enjoy high quality arts experiences*” as well as its specific objectives in the public engagement arena.¹

The Arts Council already acknowledges the “*significance of street arts and spectacle having the ability to engage with large audiences in unique and distinctive settings*”, as well as the opportunities provided by this artform to “*create experimental partnerships, especially with festivals, and to work with other artform professionals to create new and original work.*”² Regarding circus, the Arts Council notes the artistic and public engagement strengths of circus: “*as an artform, circus attracts high audience numbers each year, including many rural audiences and members of new communities. Youth circus activity is a growth area within Ireland.*”³

However, the network recognises that the perception that these artforms bring quality arts to more and different people is not entirely tested, and that there is a need to gather evidence about how the sector is engaging with audiences and meeting/exceeding public engagement expectations. ISACS is, consequently, supportive of the Arts Council's undertaking to “*invest in research and information programmes that increase our knowledge of public engagement*”⁴.

In this context and as part of its role to raise the profile, increase recognition of and support the development of this sector, ISACS has undertaken to:

- ⇒ inform its members and share learnings about relevant audience research practice
- ⇒ support any individual audience research projects they are undertaking
- ⇒ participate (as a network) in relevant national and international audience research programmes
- ⇒ undertake audience research activity that generates robust, reliable information and insights about audiences for, and the impact of, street arts, circus and spectacle in Ireland.

This document is a roadmap for the organisation and the sector to guide its activities in the area of audience research 2016-2018. It includes:

- a. A look at some relevant and recent audience research in Ireland and the UK, and some key audience insights that have been garnered in similar artforms/contexts;
- b. Identification of key issues and challenges for ISACS and its members in engaging in audience research activity;
- c. An overview of ISACS's audience research work to date in 2016, including an introduction to the research project initiated by ISACS with the University of Limerick, the main focus of the network's primary audience research activity in the coming two-three years;
- d. Planned next steps for this research project and other concurrent audience research activity that ISACS will progress in 2017 and 2018.

¹ *Making Great Art Work* Arts Council Strategy (2016-2025), pg. 24-26

² www.artscouncil.ie/Arts-in-Ireland/Street-arts-and-spectacle/Overview/

³ www.artscouncil.ie/Arts-in-Ireland/Circus/Overview/

⁴ Ibid.

WHAT WE KNOW ABOUT AUDIENCES

AUDIENCES FOR WHAT?

What do we mean, exactly, when we talk about street arts, circus and spectacle?

Arts Council England defined street arts in 2006, incorporating spectacle into its definition: *Street arts is a broad term that comprises a variety of forms including theatre, music, circus, dance, carnival, mela festivals, installation, pyrotechnics and spectacle. Street arts:*

- ⇒ *is presented outdoors, usually in non-traditional performance spaces and is often free to the public;*
- ⇒ *can be presented in a range of urban and rural context – on streets closed to traffic, in shopping centres, parks, village greens and town squares;*
- ⇒ *ranges from the epic to the intimate and can be presented across the widest range of scales of audience size;*
- ⇒ *enjoys a democratic relationship with its audience with people free to engage with work for as little or as long as they wish.*⁵

ISAN (Independent Street Arts Network) in the UK have chosen to embrace the umbrella term outdoor arts in more recent years: *Outdoor arts describes arts practice that take place outside of conventional art venues such as theatres and galleries, primarily in the public realm i.e. streets, parks and many other public spaces and that are staged within a specific period of time. Outdoor arts embraces a range of genres, art practices and forms including theatre, dance, circus, spectacle, visual arts, processional and carnival forms including mela, music or any combination of these.*⁶

Circus is also a term whose definition is being questioned and expanded by artists all over the world. It is recognised by the Arts Council as falling into two distinct strands: *traditional/classical circus and contemporary circus. The distinction between the two is reflected in the differences between the styles of presentation, artistic direction, modes of distribution and histories of development within the country.*⁷

Arts Council Northern Ireland refer to the terms circus arts under participatory arts, and they have identified street theatre and spectacle within this: *circus arts and street theatre can embrace a variety of disciplines and techniques including acrobatics, clowning, trapeze, silks, contortion, stilts, juggling, music, spectacle, dance, physical theatre and comedy.*⁸

ACNI also use the term carnival arts, but do not describe or define it. They do describe carnival arts as *one of the most accessible artforms both for participant and audience member. Carnival Arts supports tourism and has an important economic contribution to make, it is used as an effective tool for community cohesion, social inclusion and the celebration of diversity within our society.*⁹ We understand that ACNI are looking to develop dedicated Carnival Arts and Circus Arts strategies (2017-2020) and as part of that will define the “carnival and circus arts” sector in Northern Ireland.

Circostrada (European Network for Circus and Street Arts), a long-established network based out of France, retains the term street arts in its name but embraces circus arts and outdoor arts in its work. It notes a number of factors that impact on obtaining and harmonizing data on circus and street arts across countries, including the *“existence (or not) of their recognition as an autonomous artform. ... status as an emergent arts field ... different understandings of artforms such as outdoor arts or street arts.”*¹⁰

⁵ ACE Street Arts Health check (2006)

⁶ Fuller definition and description at www.isanuk.org/outdoor-arts (2014)

⁷ www.artscouncil.ie/Arts-in-Ireland/Circus/Overview/

⁸ www.artscouncil-ni.org/the-arts/participatory-arts1/circus-carnival-arts

⁹ Ibid.

¹⁰ *Public Policies Supporting Circus & Outdoor Arts in Europe* by Christina Farinha (2013)

Here in Ireland, the Arts Council named its areas of interest as circus, street arts and spectacle in 2005, and ISACS consequently adopted those terms. Given the nascent nature of the sector in Ireland, and the (relatively) small scale of the country, ISACS wishes to be support and advocate for as broad a spectrum as possible as this kind of work evolves and grows in Ireland.

In addition to both strands of circus identified by the Arts Council, the network concerns itself with street art and spectacle, which is not formally defined by the Arts Council, but which we understand to be any artistic creation/output which is made for the public realm, often outdoors – fields, carparks, streets, forests, beaches – but also in (and on) buildings beyond traditional arts venues, such as warehouses, garages and more. It can include performance, theatre, dance, music, visual arts, installation, literature, poetry, puppetry, story telling, sport, science, maths, circus arts, costume, carnival, procession, pyrotechnics... it is not so much what takes place as the context in which it takes place.

SOME THINGS WE KNOW...

In the **Public and the Arts (2006)**, attendance at “open air street theatre/spectacle” was recorded at 19% of the population – the fourth most attended arts category. Circus attendance was recorded as 13% of the population. 33% of the population attended an arts event in an open-air venue in the previous 12 months¹¹, all of which indicate a substantial and long-standing public engagement with this sector’s work in Ireland.

Street theatre/spectacle’s socio-economic reach was reported in **The Arts, Cultural Inclusion and Social Cohesion (2007)**, which reported attendance at street theatre/spectacle showing the least variation by household income: 16% of households under €30,000 and 20% of those over €30,000. *Those on higher incomes were three times more likely to attend classical concerts, and twice as likely to attend plays, and art exhibitions. Attendance at street theatre/spectacle shows the least variation by income, which may be related to the fact that most of these events are free, and to the inclusive nature of the location in which they are held.*¹²

In the Frame or Out of the Picture? (2008), a report focused on cultural exclusion, recorded and reported the broader socio-economic attendance at street theatre than generally for the arts: *the impact of socio-economic circumstances on attendance at arts events is very striking. Educational attainment, social class and household income are significantly related to attendance, even when other variables such as age and gender are controlled for. Only one type of event, going to the circus, is not significantly associated with at least one of these.*¹³

Unfortunately, we do not have more recent comparative figures for attendance as the TGI (Target Group Index) national consumer survey, which formed the basis of arts attendance research by Arts Audiences (2011-2014) – including the extensive **Arts in Irish Life (2014)** report - did not include open air street theatre / spectacle or circus as separate event types. Neither can we find further nationwide investigation or evidence in Ireland of the social, economic and diversity of audiences for these artforms.

One of the most extensive recent pieces of research undertaken into audiences for outdoor arts and of interest to ISACS is the three-year **Audience Finder: Outdoor Arts research (2013-14)** in the UK, undertaken by the Audience Agency in partnership with ISAN. With 17,000 individual survey responses and over 40 participating cultural organisations, this is one of the largest and most comprehensive research projects undertaken into outdoor arts anywhere in the world.

Noteworthy findings from this UK research Year 1¹⁴ and 2¹⁵ include:

- ⇒ Outdoor arts audiences are local (than for other artforms) - though in some cases people will travel if the offer is perceived as being distinct or if the audience has a special connection with that place;
- ⇒ Outdoor arts attracts an audience more demographically diverse (age, ethnicity, culture) and more representative of the population as a whole compared with other artform sectors;
- ⇒ Outdoor arts audiences are dominated by those “somewhat engaged”¹⁶ in the arts: generally considered important prospects for sustainable audience development as they are “open to persuasion but often not catered to;
- ⇒ Outdoor arts audiences appear to be somewhat younger than for other artforms – average age 30/34;

¹¹ *The Public and The Arts*, Hibernian Consulting with Insight Statistical Consulting and Martin Drury, arts consultant for the Arts Council (2006), pg. 14

¹² *The Arts, Cultural Inclusion and Social Cohesion*, NESF Report 35 (2007), pt. 1.43, pg. 13

¹³ *In the Frame or Out of the Picture? A Statistical Analysis of Public Involvement in the Arts* by Pete Lunn & Eilish Kelly NESF (2008), pg. 26

¹⁴ *Audience Finder: Outdoor Arts Year 1 Report*, Audience Agency (2014)

¹⁵ *Audience Finder: Outdoor Arts Year 2 Report*, Audience Agency (2015)

¹⁶ *UK Arts Audiences: Insight* (2008) arts engagement categories based on MOSAIC geo-demographic classification of consumer types

- ⇒ “To be entertained” and “to spend time with friends and family” - the social experience - is an important part of the appeal of outdoor arts. Motivations are less likely to be “to be inspired” or “to be intellectually stimulated” or “professional motivations”;
- ⇒ There is a strong association between outdoor arts and the places it happens, with this activity being seen as contributing to a wider sense of civic pride and community cohesion.

The *Audience Finder: Outdoor Arts* report 2015 cautioned that, as a quantitative big data project, it can give a clear sense of **who** engages with outdoor arts and **why**, but is limited in being able to explain the impact of engagement on individuals, communities and society, which will require different and complementary methodologies.

This research does provide substantial audience profile information for audiences for outdoor arts in our neighbouring country, and is most encouraging for the sector in Ireland, providing robust evidence for what many believe to be the strengths of the artforms.

While there are many cultural similarities between Ireland in the UK, we believe it is **not** appropriate to infer from the UK research that Irish audiences for these artforms are identical to those identified in the UK research, and believe it is necessary to carry out audience research information here in Ireland to garner insights into Irish audiences. However, ISAN’s research provides a wealth of information regarding approach, methodology guidelines, survey question suggestions and potential pitfalls to shorten the learning curve for ISACS’s research project here in Ireland.

In 2014, ISACS commissioned a **report on audiences for street arts, circus and spectacle in Ireland (June-Sept 2014)**.¹⁷ This report focused on collecting information from the artists/company/promoter about the types of events and locations in which work was taking place, audience estimations and existing methods of counting attendance at events, and other feedback relating to the presentation of such events.

Responses from 20 presenters/organisations recorded 89,316 attendances at **outdoor** street art, circus and spectacle events over a three-month period in 2014. This is in addition to an estimated attendance of 230,000 over three days at Royal de Luxe’s *The Grandmother* as part of Limerick City of Culture 2014, and a further 45,051 attendances at events in indoor venues.¹⁸

These incomplete outdoor audience estimations, if extrapolated over the entire year, would suggest attendance at such events by approx. 13% of the population, in line with figures from *The Public and the Arts (2006)*.¹⁹ We would suggest that this is a conservative estimate and hope that future research can provide more accurate contemporary information on population attendance at such events.

One of the most interesting findings from this report is that at least 34% of responses related to indoor presentations (including theatres, black box studios, tents and hotels), indicating this is a significant context in which this kind of work is presented and a necessary element of any future audience research undertaken for the sector in Ireland.

¹⁷ *Report into audiences for Street Arts, Circus and Spectacle in Ireland June - September 2014*, Kath Gorman (2014)

¹⁸ *Report into audiences for Street Arts, Circus and Spectacle in Ireland June - September 2014*, Kath Gorman (2014)

¹⁹ $89,316 (3 \text{ month estimate}) \times 4 + 230,000 = 587,264$, or 12.8% of 2014 national population (4.58 million)

DRAWING THE CROWD IN IRELAND: RESEARCH CHALLENGES

It is well known to ISACS and the sector here in Ireland that there is a clear need to have current, accurate, audience knowledge. *“[An initiative to map audience profile] is crucial for the sector as it often engages with audiences on a large scale, and this evidence will aid in recognition and support for the sector highlighting the impact that they have and encouraging funding from other sources beyond the Arts Council as the sector’s main funder.”*²⁰

ISACS notes the following particular challenges to garnering accurate audience information about and by the sector in Ireland:

- Different understandings / definitions of sectoral artforms/terms such as street arts, outdoor arts. This presents a challenge to defining which events should be included in any research into the sector.
- Lack of research to date for this kind of work in Ireland: difficult to establish a baseline.
- Lack of recent arts attendance information – even broad stroke figures - that includes outdoor work.
- Lack of a set of industry measures and artform benchmarks.
- Limited access to national geo-demographic profiling information (like MOSAIC in the UK) against which new findings could be compared.
- Substantial sectoral presentation of work in indoor venues, presenting a challenge in differentiating audiences for this kind of work from other artforms.
- Free, outdoor nature of the majority of presentations and the rapid gathering and dispersal of attenders – as well as a worry that “clipboards” will detract from the experience - making it difficult to identify, approach and interview audiences.
- Proliferation of small companies and “one-man-acts” lacking resources and manpower to carry out audience data collection.
- Short notice bookings of many street artists by presenters, particularly those specialising in circle and walkabout shows, making advance research planning difficult.

²⁰ Debbie Wright, University of Limerick – MA project (2014)

A RESEARCH APPROACH

WHAT ISACS HAVE DONE TO DATE

To begin to address the gaps in audience knowledge in Ireland, ISACS and UL have undertaken a number of research related activities since 2014, including:

2014

- *Creating Outdoor Theatre Performance: a case study of the theatre, street arts and processional company Macnas* by Debbie Wright, exploring the work of the Galway company in the context of the development, relevance and creation of outdoor arts in Europe
- *Audience Development* by Debbie Wright, a document explaining audience development for the street arts, circus and spectacle sector, introducing key organisations, the most important info to collect and how to collect it and the pros and cons of each approach.
- *Audience Aware*, a concise guide for collecting, understanding and using information for ISACS members, based on Debbie Wright's document and widely disseminated to ISACS members
- *Report into audiences for Street Arts, Circus and Spectacle in Ireland between June and September 2014* by Kath Gorman

2015

- Establishment of a research partnership with University of Limerick MA in Festive Arts led by Dr. Niamh NicGhabhann and based at the World Academy of Music and Dance.
- Invited by and attended ISAN UK presentation of Audience Finder research and shared approaches.
- Brought ISAN to Waterford Spraoi to present Audience Finder research to ISACS members.

2016

- Engagement of Annette Nugent as industry consultant on ISACS/UL audience research project.
- Primary research project with UL MA in Festival Arts initiated: research needs analysis completed.
- Sector event types identified (circus, parade/procession, circle show, aerial show, walkabout, outdoor installation) and ISACS members "mapped" by event type.
- Information session with ISACS members led by Annette Nugent regarding primary research project.
- Engagement with 10 festivals in Ireland to request access to their data on street art, circus, spectacle events within their festival programmes.
- Engagement with Heather Maitland to pursue possibility of identifying and extracting relevant data on street arts, circus and spectacle events taking place at participating venues/festivals through the annual Theatre Forum Benchmarking research.
- Creation of audience research roadmap.

NEXT STEPS

In 2017 and 2018, ISACS will prioritise the following activity regarding audience research:

A. Pilot primary research project (with UL)

ISACS will work with research partner University of Limerick, particularly the Festival Arts MA Course, to engage the students in the development and implementation of an academically robust and practically viable audience research programme for ISACS and its members. This has been initiated.

It has been agreed that the project will initially focus on audience size, profile and sources of information, with a plan to investigate motivations, experience and social impact in Phase 2 of the research project.

In autumn 2016, research methodology will be developed, sample events/organisations recruited and research instruments trialed for each event type, with a view to the first main research taking place in summer 2017.

B. Partnerships

ISACS will engage Heather Maitland to incorporate street arts, circus and spectacle into the 2016/2017 Theatre Forum benchmarking research, to identify and extract information on ticketed events. As noted earlier, 34% of the sector's activity takes place indoors,²¹ and we believe that the Theatre Forum Benchmarking programme will unlock significant information on this aspect of the sector's audiences.

ISACS will continue to engage with ISAN, Circostrada and other peer networks beyond Ireland to increase knowledge of equivalent audience research activities and trends in other jurisdictions and to inform research approaches here.

ISACS looks forward to engaging with the new Arts Council of Ireland Audience Advisor once in post and, where appropriate, working with the Arts Council on audience research activity for street arts, circus and spectacle.

C. Training and communications

ISACS will continue to disseminate relevant audience insights from other jurisdictions to its members, as well as holding regular information sessions about the pilot primary research project with UL. The network will also provide training, guidance and assistance for members in carrying out audience research at events.

ISACS will communicate the findings of its research to the sector, funders, arts industry and peer international networks. It plans to produce an executive summary report on the primary research project annually, with a view to each annual publication providing deeper audience insights for the sector, generating discussion about future research to undertake, and making recommendations for actions to further improve the audience's experience at street arts, circus and spectacle events.

²¹ *Report into audiences for Street Arts, Circus and Spectacle in Ireland June - September 2014*, Kath Gorman (2014)

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ABOUT ISACS

The Irish Street Arts, Circus & Spectacle Network (ISACS) is Ireland's leading support and advocacy organisation for the development of this sector. The network is made up of individuals and organisations that create, support, encourage and participate in the development of street arts, circus and spectacle. Our members include artists, artistic companies, curators, festivals, independent producers, production companies and programmers, in Ireland and beyond.

ISACS is the "national voice" for these emerging artforms in Ireland, and aims to raise the profile of, increase recognition of and support the development of this sector in the following ways:

- ⇒ Information and resource sharing
- ⇒ Advocacy and policy development
- ⇒ Training and professional support
- ⇒ National and international networking

ABOUT UNIVERSITY OF LIMERICK MA IN FESTIVE ARTS

ISACS research partner for its audience research programme is the University of Limerick MA in Festival Arts. Based at the Irish World Academy of Music and Dance in UL, Ireland's premier centre for music and dance performance education in Ireland, the **MA in Festival Arts** is a one year full-time Masters programme offering a comprehensive programme of study embracing practical, scholarly and performance-based aspects of festival studies. Students are provided with an integrated context for studying a variety of performance practices, and have the opportunity to apprentice with festivals and related organisations towards the acquisition of:

- ⇒ A strong foundation in theoretical and methodological principles relevant to the study of festival;
- ⇒ Practical experience in the creative development of festival-based artistic programmes;
- ⇒ Skills to engage in reflexive scholarship around their own particular practice;
- ⇒ Skills to create audio, visual and written documentation around identified festivals.

Course Director is Dr. Niamh Nic Ghabhann.

ABOUT ANNETTE NUGENT

Annette Nugent is a communications consultant specialising in the Irish cultural sector, advising on communications and public affairs activity at a strategic level, and working with organisations to devise and implement marketing / PR / audience development projects at a tactical level. She has carried out a number of audience research/development projects, including:

- ⇒ *Literary Festival Benchmarking* 2013/2014 for Arts Audiences;
- ⇒ *Opera Audience Development Programme* 2014 (with H Maitland) for Arts Audiences;
- ⇒ Audience Development/Community Engagement Project 2014 (with H Maitland) for Dunamais Arts Centre;
- ⇒ Study of *Audience Development in Ireland* 2015 (with H Maitland & R Gibson) for the Arts Council, to inform future national policy in this area.

DRAWING THE CROWD: AUDIENCE RESEARCH ROADMAP

Compiled by Annette Nugent, cultural communications consultant
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