



# Audience Finder: Outdoor Arts

Year 1 Report (May – October 2013)

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## Introduction

This report is not a forensic account of the Audience Finder research carried out with outdoor arts (OA) organisations in 2013, but an overview of what we learned, focusing on what it tells us about audiences for outdoor arts as a distinct sector. Most of the organisations participating in the research has their own reporting, which compares their audience with the sector averages and benchmarks. This collective report complements analysis for individual organisations.

2013 was the first year of what we anticipate will be an annual programme of audience research and development with and for the sector, benchmarking and trend analysis. It has grown out of consultation with our partners, ISAN, Independent Street Arts Network.

We learned much about the process of creating a body of knowledge for the sector. We learned new things about the collective audience and these prompt alternative ways of thinking about and planning for engagement through OA. This report brings this learning together.

### The Outdoor Arts Sector Cluster in partnership with ISAN

Audience Finder is based on a give-and-gain model in which organisations agree to align and share audience information for greater insight. Organisations collaborate in clusters with a shared agenda or need: there are now over 20 regional clusters, and 7 national “artform” clusters of which the Outdoor Arts is one, partnered by the Independent Street Arts Network (ISAN) which has acted as an adviser and disseminator of the project.

Since the success of OA programmes across the country during 2012, Arts Council England, local authorities and other stakeholder-funders have increasingly looked to the OA sector to widen and enrich cultural engagement. These expectations are often linked to a place-making or cultural tourism agenda, as in the example of many of the Creative People and Places programmes with a heavy emphasis on OA. The perception that OA brings quality arts to more and different people is not entirely tested and is therefore potentially vulnerable. The sector itself recognises the poverty of evidence and it is widely recognised that this is seen as a hindrance to the sector’s ability to lobby with one voice.

Further, the degree to which festivals, events and companies develop their offer and audience is hampered by this lack of meaningful, contextualised intelligence. This in turn may lead to the sector’s perceived weaknesses in communications and failure to develop realistic business models and income streams, complementing the “free” principles on which many are based.

Everything from crowd-funding to town-centre commissions requires not just real, new insight but valid audience data and evidence.

In short, the OA sector needs audience data to help it advance in terms of advocacy, perceptions of value, partnership-building, organisational resilience and public engagement.

## The Research

This report is based on primary research carried out with and for a number of outdoor arts organisations as part of Audience Finder. Some other outdoor arts events taking place in 2012 and 2013 which have been involved with The Audience Agency's work have also been added to this analysis where the methodology was consistent and the results useful for inclusion or comparison. This included the work which The Audience Agency did with the Without Walls consortium and the Mela Consortium, both of which were part of Strategic Touring Programme initiatives.

### Audience Finder

Audience Finder is a national audience insight programme commissioned by Arts Council England aiming to support funded organisations to:

- Gain practical insight into audiences
- Embed national approaches to sharing and applying intelligence
- Create a set of industry measures and artform benchmarks
- Develop practical approaches to quality of experience

Essentially, Audience Finder provides a national framework for comparable audience information, industry measures and benchmarks alongside tools and support to help cultural organisations put this knowledge into practice. There is full information at [www.audiencefinder.org](http://www.audiencefinder.org)

Audience Finder aims to help participating organisations and whole sectors to understand:

- Who are our audiences?
- Where do they come from?
- What do they do?
- What do they think?
- How do we interact with all this data?

## Key questions for the OA sector

The design of the 2013 research was formed in consultation with ISAN (and the Without Walls consortium) in response to these issues. Two consultation meetings have so far taken place, in December 2012 and June 2013 in which we identified a number of issues of critical importance to the development of audiences and of the sector.

Together, we prioritised the following research questions

1. How far does OA reach audiences other arts do not?
2. What are the implications for audience development?
3. What improvements would help to increase engagement and public support?
4. What is the economic impact of OA?
5. What are the implications of paid-for models?
6. What are the intrinsic and instrumental benefits?
7. To what degree is the quality of the artistic experience critical to these outcomes?

In the event, it proved problematic for all festivals and events to use the research framework/template designed to answer all these questions. Therefore, we feel that we have so far found useful answers to questions 1 and 2 and formulated ideas and potential innovations for 3. We anticipate Year 2 as an opportunity to tackle the more specific issues further down the list.

## Year 1 Methodology

In developing the methodology, we hoped to strike a balance between rigorous standardisation (of questions, samples etc.) and pragmatic flexibility. This included development of:

- Standard questionnaire
- Core set of 10 demographic questions comparable with other sector surveys
- Modular set of standard questions comparable with other sector surveys
- Comments and qualitative feedback were also collected
- “Handbook” with clear instructions for users
- E-survey to complement face to face surveying
- Online interface for organisations to upload their data
- Collection of postcode data to enable analysis using geo-demographic lifestyle profiles

We encouraged organisations to collect data through interviewer-led surveys and offered volunteer training to support this process.

We should note that data is not currently weighted and not sub-clustered so combined figures here represent a “mythical average festival” across a wide variety of events.

## Year 1 Experience

Around thirty companies and their associates took part in the research, covering over forty events between May and October 2013, across all nine English regions with over 7,000 people surveyed. Despite an impressively large sample and reasonable national spread, research was not as robust as we would have wished, surveys were carried out with a good deal of variance in methodology and many already had existing research campaigns which they wished to continue.

Nevertheless, it is probably the largest national survey of its kind and we are confident in a number of headline findings. These are, in themselves, revelatory enough to demand a significant development in the Year 2 programme and invite a commitment from stakeholders.

## Operational Challenges

Collecting significant samples of audience data in a reasonably rigorous way outdoors is a challenge, a drain on staff time and attention, and arguably disrupting the relaxed, free-flowing nature of the event itself. We tried to counter some of these challenges, including training and support for fieldworkers and contributing extra members of staff.

As noted, the data collected was not as rich as envisaged. Festivals and organisations were given a menu of recommended questions from which to choose and many were reluctant to ask the full range, concentrating on demographic questions rather than richer, behavioural and motivational ones. The samples for these more rewarding areas of exploration are smaller.

Sample sizes, especially for smaller companies, are in some cases not large enough to offer conclusive information and are therefore ‘indicative’ and the issue of randomising samples, through the use of suitably trained and confident staff, needs to be improved for following years.

Combined, these limitations have prevented deeper interrogation of the data but we anticipate improving the quality and countering the majority of issues in Year 2.

## Cultural Challenges

We talk of an OA sector, but in reality of course, this is a loose collective of artists, producers, festival organisers, community leaders, local authority arts officers and many more besides

who come together to make extraordinary arts experiences outdoors. All need to know different things about their audiences. A company making work may want to know more about people's reactions, while a promoter often needs to know about everything from car parking to demographics. We learned that this diversity of need must be reflected in development of the programme.

People making events happen are very, very busy on the day and we have to acknowledge that data-collection and processing is not top of the priority list. We need to keep asking how we can make this as easy as possible, through pre-planning, streamlining and sharing ideas and resources.

There is a broad consensus that clipboards and bean-counting can detract from the “without walls” experience. We need to ensure that data-collection is not just in harmony with but actually contributes something positive to the aesthetics of OA. We've already seen that well trained, empowered volunteers willing and able to listen can enhance the experience: how do we develop this practice?

### **Not the new Health and Safety:**

#### **Making audience research relevant and useful for OA**

The first headline results were presented to the sector at the 2013 ISAN conference in a debate about audience research. During the debate, one speaker suggested that audience research was about to become a new funder-driven imperative without much meaning for the sector. There is a concern that funders may drive organisations to undertake audience research as a box-ticking exercise, a trend to be avoided at all costs. As a result we are keen to reflect back to Arts Council England recommendations for good research practice appropriate to different types of OA organisations and reflective of the challenges observed.

#### **2014: Findings in Practice**

These findings and the 2013 experience have shaped a free workshop programme exploring audience development and public engagement issues for organisers of Outdoor Arts events.

They are also driving the research design to help us understand other crucial issues and make the process more effective for a wider range of producers, including those touring work to festivals and events. The 2014 programme can be found in appendix 5 and updates at [www.audiencefinder.org](http://www.audiencefinder.org)



## The Findings

The full results for this study can be found in Appendix 2. Here, we concentrate on the key issues identified with the sector that this year's research enables us to answer, in particular: *“How far do OA reach audiences other arts do not?”*

To answer this question, we have looked at the “localness” of audiences for OA, their demographic profile and common characteristics, comparing these issues with what we know about other “indoor” artform audiences.

### Comparators

The OA cluster is the first in Audience Finder to have completed a full year, so the standard artform and other national Audience Finder indicators are not yet available. However we have referred to:

- Analysis from a group for **arts centres**, located across England; the mix of artforms and broad audiences these organisations host make these strong benchmarks for engagement with the arts.
- **Showtime** - analysis of the Mayor of London's 2012 Outdoor Festival; to date, the largest survey of OA audiences, indications in this research have been amplified in this research
- **Snapshot London Performing Arts**; a rolling analysis of London's 35 main subsidised performing arts venues, this provides 10 years of engagement indicators
- **Snapshot London Visual Arts**; similarly 20 major subsidised galleries in London
- **Opera and Ballet review**; 2013 review of audiences at a group of number one touring venues across England.

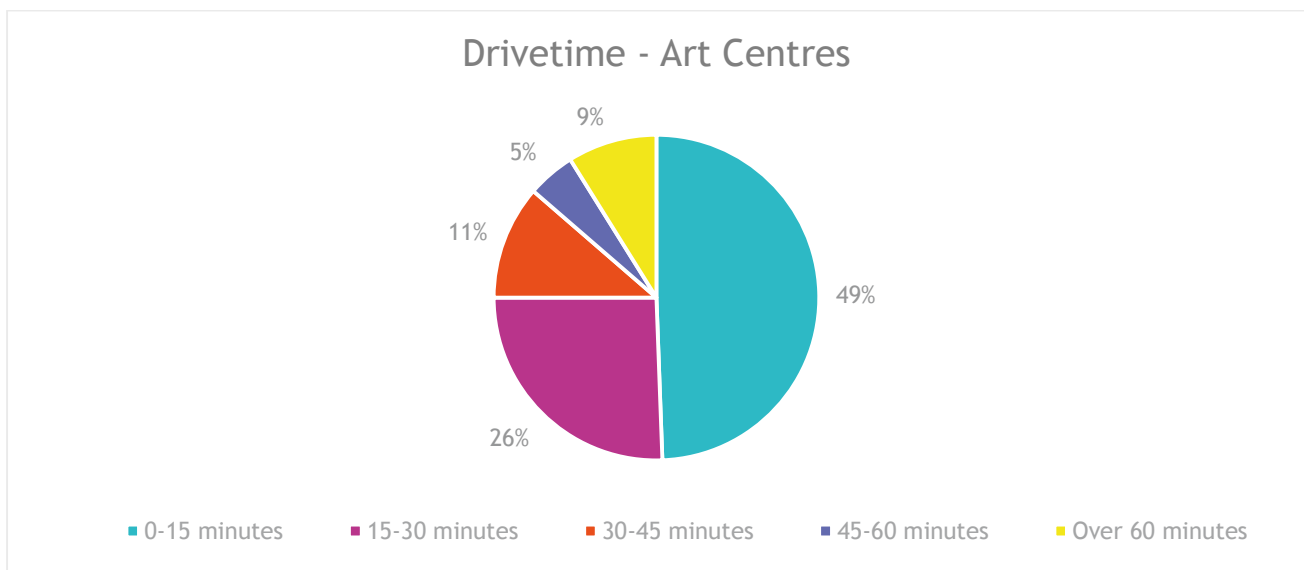
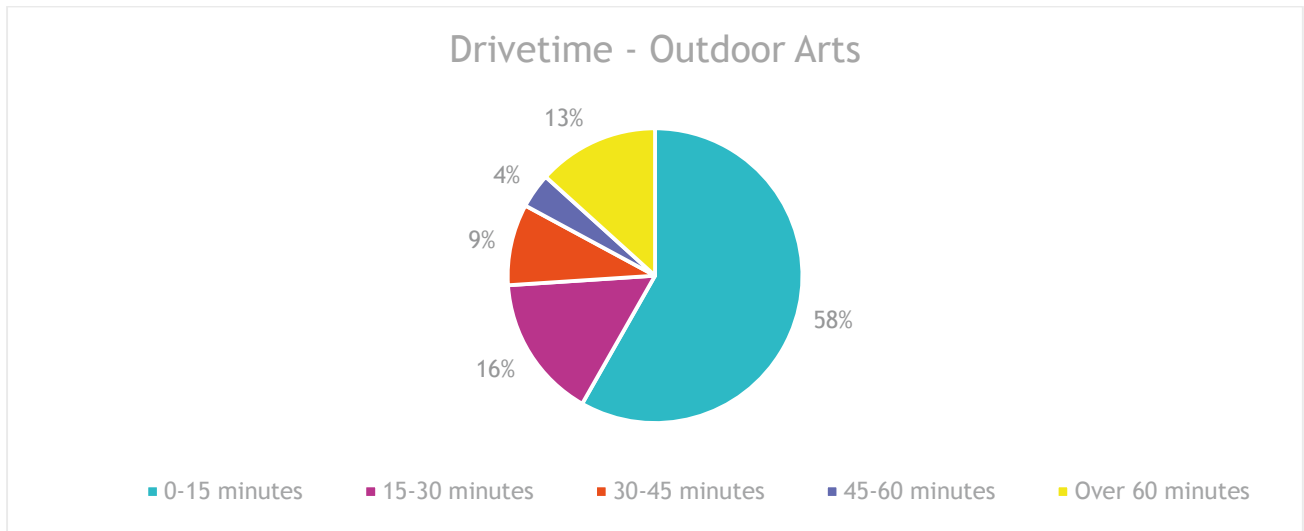
These are either referred to explicitly or implicitly in some of the narrative assertions.

### Localness

Consolidating the stark findings of the 2012 research for Showtime, the research demonstrates that audience for OA are by and large very “local”, travelling very short distances and representing local communities in a surprisingly accurate way, a feature consistent across all festivals, and distinct from audiences for indoor arts.

## Drive Time

The localness of audiences is measured in “Drivetime”, with nearly 60%<sup>1</sup> of audiences coming from within a 15 minute travel distance, (taking large Regent St sample into account with some overseas visitors in the mix) compared with arts centres 49%, and Opera and Ballet’s 20%. This reflects Showtime findings which are starkly different to those for other London indoor arts.



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<sup>1</sup> Excluding the large Regent St sample which included a high number of overseas audiences, the proportion of audiences in 0-15 mins drive-time is over 60%

## Diversity: representative of local communities

Audiences are demographically diverse, and more representative of their catchment areas than indoor arts. Again we look particularly to the arts centres cluster to illustrate this point, for although they do impressively well at attracting audiences from across their community, OA seem to do even better.

Generally, the OA sector attracts ethnically and culturally diverse audiences, with the NW Mela group in particular raising the bar in terms of cultural diversity. The research into melas was part of a commissioned piece of work as part of a Strategic Touring Programme project. It showed that the melas are true to their name as places of “gathering”: while some events attract majority Asian audiences, all attract a broad mix of other cultural communities.

Interestingly, audiences would appear to be somewhat younger than those for indoor arts, at an average of 30-34.

## Mosaic Demographic-lifestyle Profiles

Mosaic<sup>2</sup> is an analysis tool that enables us to predict a household’s propensity to share demographic and lifestyle characteristics with others in the same post-code. It is a tested and accurate way of understanding key differences in the population, including not just information about income and education, but attitudes and interests. Analysis of large samples of post-code data can tell us a lot.

The nuances of the profiles are interesting to the sector and to individual organisations, but at sector level, what is most striking is how far audience profiles match those of the population. There is far less dominance of the “usual suspects” prevalent among indoor arts audiences, in particular groups A (Alpha Territory) B (Professional Rewards) and O (Liberal Opinions) which between them account for over 60%<sup>3</sup>.

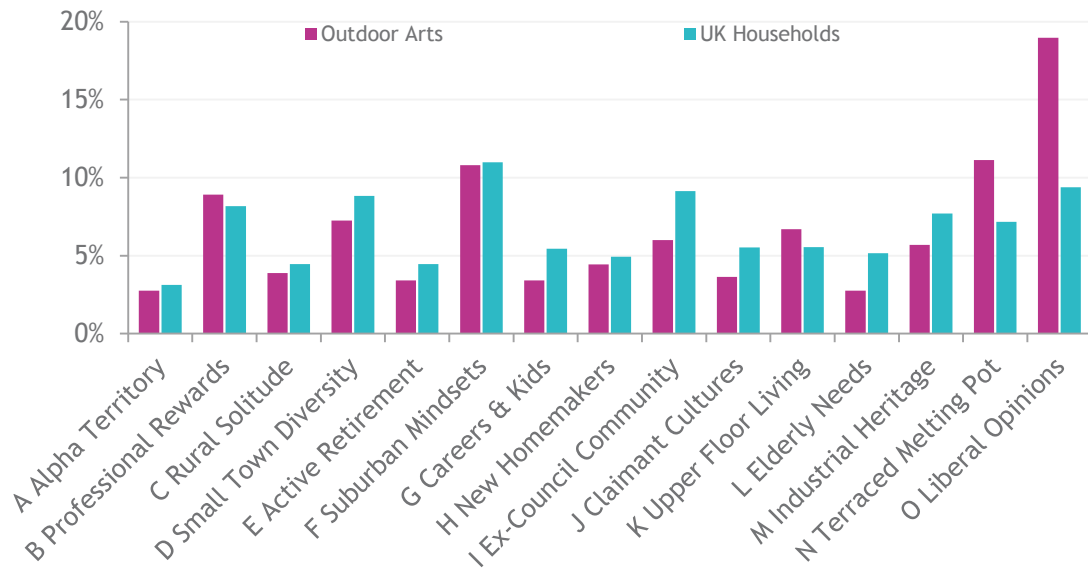
In comparison, OA does surprisingly well at attracting often absent groups like Ex-Council Communities, Claimant Culture and Industrial Heritage<sup>4</sup>.

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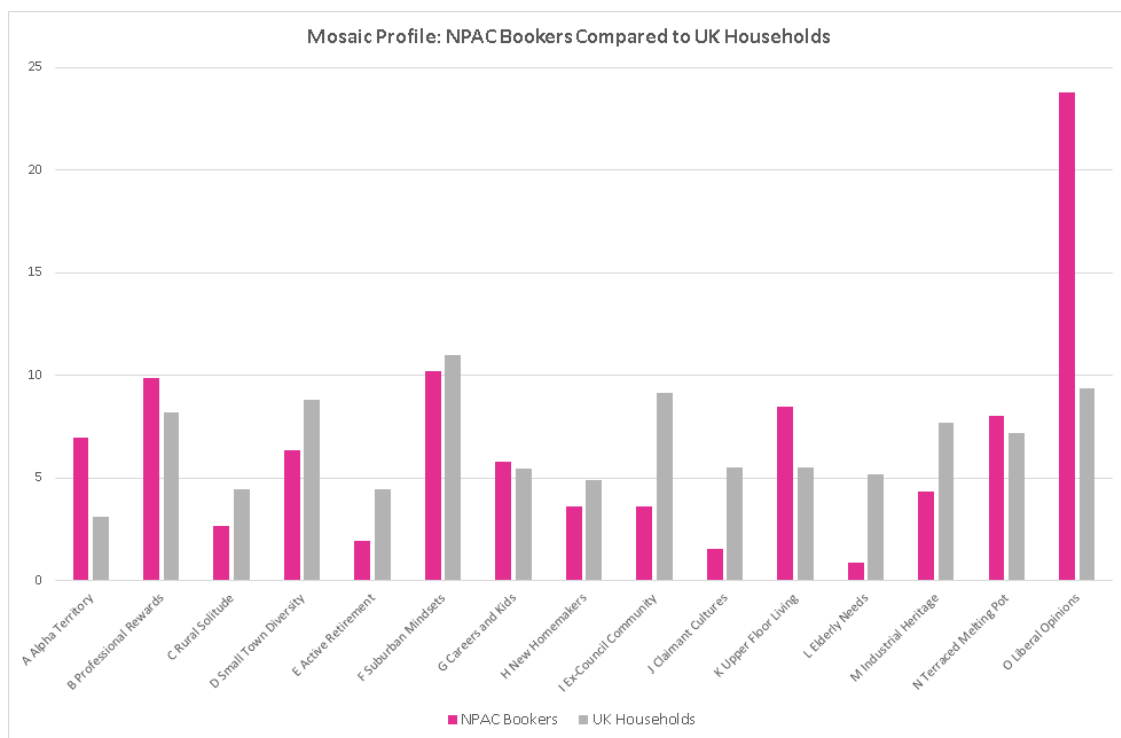
<sup>2</sup> Find full details about Mosaic and the profiles here: [http://www.experian.co.uk/assets/business-strategies/brochures/Mosaic\\_UK\\_2009\\_brochure.pdf](http://www.experian.co.uk/assets/business-strategies/brochures/Mosaic_UK_2009_brochure.pdf)

<sup>3</sup> Year on year profiles for London audiences, Snapshot London

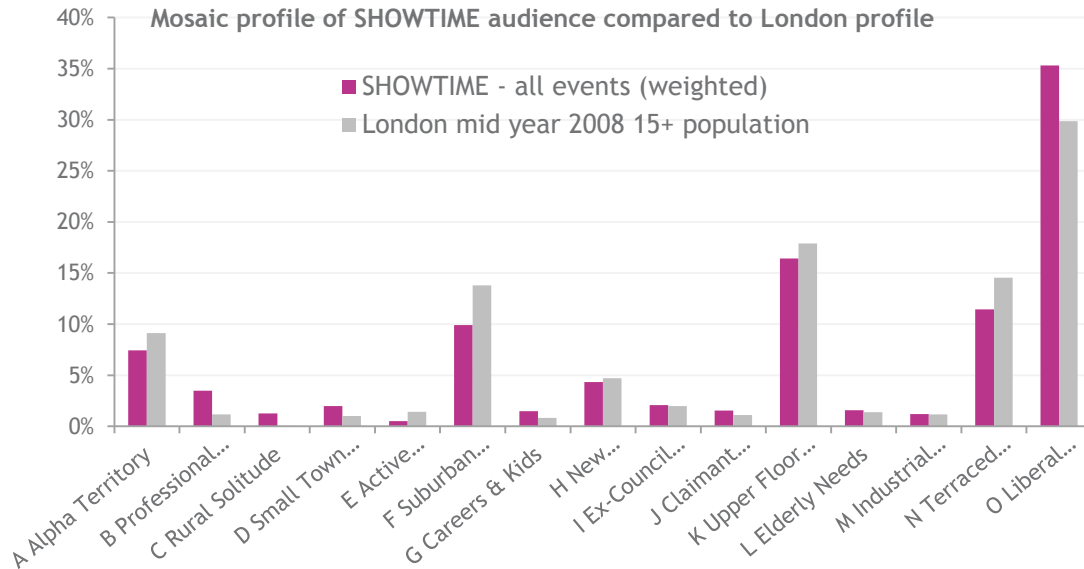
<sup>4</sup> Again, proportionally, OA is attracting at least twice as much of its audiences from these groups than the 35 venues in Snapshot London.



This graph shows how representative audiences are of the population, compared with the sample of arts centres.



The large sample from London 2012 Mayor's Cultural Festival - a typical programme of free outdoor events and street arts in local festival settings, shows audiences mirroring the population even more closely.



### Less Engaged Audiences

Similar post-code based profiling, this time using Arts Audience Insight<sup>5</sup>, tells us that unusually, OA audiences are dominated by the “somewhat engaged”. This groups people with some interest in the arts but a limited attendance habit. 60% - 70% of the population fall into this “somewhat engaged” category - they are generally considered important prospects for sustainable audience development as they are “open to persuasion” but often under-catered to. In the survey, most respondents were regular but not frequent attenders, most (65% for the whole survey but ranging greatly between events) having attended the same event in the past. We can conclude that these audiences represent a major opportunity: they are plentiful, under-served by other cultural offers, and well-disposed towards OA.

### Seeking Social Benefits

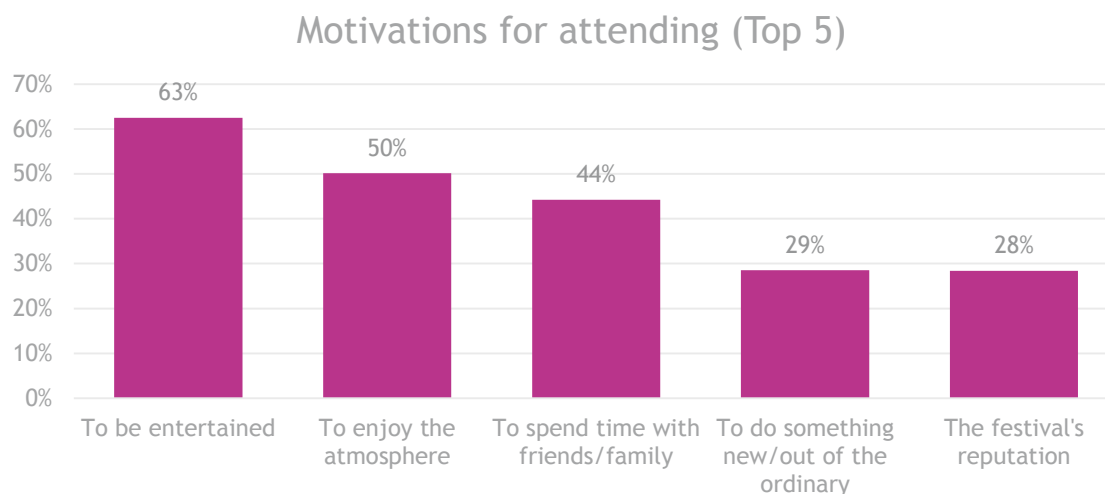
Crucially, one of the defining characteristics of being “somewhat engaged” is that people are in search of what we might think of as primarily social benefits. This is NOT to say that the quality of cultural experience is of no importance - far from it.

The top 5 reasons people give for attending reflect an interest in a social outing but linked directly to the OA experience. Motivations like “to be inspired” or “to be intellectually

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<sup>5</sup> Arts Council England’s segmentation of the population by their interests in the arts; [www.audiencefinder.org](http://www.audiencefinder.org) for profile information.

stimulated” score far lower - though in similar studies of other artform audiences<sup>6</sup>, they are dominant. “Professional” motivations also score low for OA (around 10%) while for indoor, especially contemporary, arts they are often cited by over 50% of audiences.



It is also significant that people are attending in larger party sizes, and as part of family groups, in far greater numbers than in any of the indoor arts studies we refer to here.

### Rating the Experience

Overall, ratings of the experience are consistent with the general pattern in arts surveys, with the creative offer gaining the highest ratings. The ratings for explanatory, onsite and in advance communications were relatively low which could suggest an area for improvement. This is borne out by the feedback given in the free comments section of the questionnaire.<sup>7</sup> Generally, the longer established a festival, the better the ratings for information were.

### Cultural Tourism & Economic Impact

The relatively low numbers of people generally attending from without a region do challenge the notion of OA as a driver of cultural tourism. This is further backed by the fact that the motivations people listed are not consistent with the range of benefits sought after by cultural tourists.

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<sup>6</sup> Eg Snapshot London Performing Arts

<sup>7</sup> See Appendix 4

The notable exception is the SO Festival in Skegness, attracting large numbers of audiences from over 1 hour drive-time, particularly from Nottingham with which city Skegness has long had a strong tourism link. While this exception demands more exploration, it certainly hints that OA may have a consolidating effect rather than an instigating one on cultural tourism.

It should be noted, however, that no cluster has yet shown much more than 10 - 15% of audiences coming from over 60 minutes' drive-time area, so OA is not unusual in this sense.

Nevertheless, the economic impact of in-region tourism and local visitors should not be underestimated, and OA festivals and events which undertook comprehensive economic impact research can demonstrate a very positive effect.

### Sense of Community and Social Impact

*I like the easy, happy sense of community....* [audience member]

Many of the open comments collected in the questionnaires indicate that people enjoy the sense of being together with their neighbours, celebrating their own place at OA events<sup>8</sup>. We proposed a number of more specific questions seeking to quantify the social impact of events; optional questions included:

- *This event helps to enhance the sense of community in this area*
- *This event makes a positive contribution to this area's image*
- *I feel safe at this event*
- *This event made me want to attend outdoor arts events in the future*
- *Has this festival made you more or less likely to visit [area] in the next 12 months, other than to attend this event?*

Although it appears a majority of respondents said events built a sense of community, a minority said it would make a difference in attracting them back to an area. However few organisations opted for these questions, so results are inconclusive.

This lack is disappointing, given the other observations made about the localness and loyalty of audiences.

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<sup>8</sup> See appendix 4

## The Implications

So what are the implications for the sector in terms of audience development? What improvements would help to increase engagement and public support? As noted, the data for 2013 is neither as complete nor robust as we might aspire to, but combined findings certainly enable us to form some strong and significant hypotheses for future exploration.

### Localness Explored

As we know, many of the events and companies taking part in the research are excellent brokers of local relationships, many of them fully embedded in their communities. Many work with local organisations, partnerships, businesses, artists and indoor arts, often in a very involving or participation-based way. Certainly these findings would suggest that development of this reflex is bearing fruit and that these competencies are essential to OA practice. It also suggests future potential for:

- Working in local partnerships for investment
- Location-based fundraising
- Relationship-based, rather than visitor-focused, audience development strategies
- Role as broker of local creative partnerships
- Qualified, in-region tourism strategies

As previous studies have suggested, the localness of audiences could also drive a more collaborative approach to commissioning and programming.

### Making the case for Outdoor Arts

“Localness” may also be an important factor in making the case for OA. While many events have demonstrated economic impact, a more complex case based on combined economic AND social impact may be harder to beat. If this IS the case, however, the sector will need:

- A coherent concept of a particular kind of place-making
- High quality evidence - and therefore...
- Commitment to data-collection

We strongly encourage the sector to think more about measuring social impact and anticipate developing this area of exploration with some if not all organisations participating in the 2014 programme.



Although the 2013 survey failed to tackle the issues of alternative income streams in any meaningful way, various demographic factors combined with clear levels of loyalty<sup>9</sup> could encourage experimentation in community based crowd-funding or other forms of small-scale donation and fund-raising linked to a local agenda.

## The Case for Cultural Tourism

As noted, this research suggests that the case for OA as a driver of cultural tourism needs qualification. Certainly, the audience statistics do not seem to compare favourably with the large, urban building-based iconic institutions in terms of international or even overnight tourism (though this might not be the case in terms of pound-for-pound investment). More positively, some festivals can demonstrate real impacts in terms of either in-region day-tourism, or where they play a part in a highly focused, place-based strategy (like that of Skegness and Nottinghamshire) and further exploration of these more partnership-based, targeted approaches seem important.

## Opportunities for audience development

Collectively it seems as though the sector should be mindful of the value audiences place on OA experiences in terms of their social benefits. These are drivers for a significant majority of audiences: how can we augment these positive experiences? Our suggestions:

- Pay special attention to the “total experience” - food, drink, social space are all very important
- Facilitate families and larger groups, make it easy for them to navigate the programme and space: their needs are different from other attendees
- Aid instigators, or those organising large groups, to help them with the information-journey as anyone planning for others will need to know a lot in advance and be able to disseminate information easily. How can social media and mobile help you to help them?
- Provide after-event communication so that audiences know what they have seen, including photographs and comments and suggestions about how they can take their interest further

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<sup>9</sup> Returning audiences are strong, at 80%. See Comments too.

- Capitalise on strengths to engage wider audiences: use local partnerships, engagement gateways like local employers, schools and social groups to build new audiences.
- Focus on getting feedback on the things you can change and adapt: surveys are only one way of doing so - open up as many channels that you can.
- Road-test different communications strategies with audiences, and include some new/non-attenders in this testing

These suggestions also reflect a possible need to focus on communication and navigation which the experience ratings and comments imply.

### Somewhat engaged?

Given that a majority of audiences fit the profile of interested but less frequently engaged and less culturally confident audiences, how can we maximise the quality of their experiences? Audiences in these groups often want more rather than less explanation and are interested in contextual information: why did you choose these artists, what ideas are they exploring?

- Provide plenty of optional background information in advance and on site
- Improve navigation - both literally in advance, on-site and on mobile. As is clear from ratings and comments, what is obvious to the organisers and even to regular attenders is frustratingly unclear for some audiences
- These audiences are susceptible to expert recommendation: whose opinions and advice could you engage?
- Don't forget "after-care", follow-up with audiences not just pointing them in direction of future offers, but also explaining what they have experienced and how else to get involved

# Recommendations

## ISAN and The Sector

Explore the following:

- Lobbying based on local (social) impact
- Commit to better data to make this case
- Family Friendly (standards, campaign, programming) distinctly for OA
- Experimentation with collaborative programming
- Experimentation with local crowd-funding
- Showcase and celebrate high quality community involvement (e.g. Mela model),
- Showcase and celebrate innovative audience focused planning, enabling social experience, navigation and contextualisation of artists work
- Develop a qualified case for cultural tourism and more sophisticated understanding of the place of OA in the tourism offer

## The 2014 Audience Finder Programme

- A three-tier survey:
  - a) light-touch survey for small touring companies
  - b) a comprehensive survey exploring key themes identified
  - c) qualitative research exploring complex attitudes in more depth
  - d) web analytics, testing a range of communications
- Workshop programme picking up on themes above:
  - a) community engagement (inc. crowd funding and other local activism)
  - b) audience-focused communications, family friendly
  - c) use of social media to these ends
- Review funder demands with Arts Council England
- Engage sub-set in full economic and social impact study using ACE Impact Toolkit

# Appendices

1. Organisations participating in the research
2. Survey questions
3. Full Results
4. Comments
5. 2014 Audience Finder Outdoor Arts offer

# 1. Participating Organisations

## Organisations included in the benchmarks

<b>Full Survey</b>	Derby Feste So Skegness Festival Salisbury Festival	
<b>Partial Survey</b>	Fuse Festival Out There Festival Circulate Kazzum Tilted (Outthere and NNF) Village Green - Metal Culture Norfolk and Norwich Festival Winchester Hat Fair Wirksworth Festival 4 Squares Festival	Regent Street: Summer Streets Regent Street: The World on Regent Street Regent Street: NFL event Brighton Festival Luton Carnival The Elephant and the Nun North West Melas
<b>Comparable Survey</b>	Bradford Festival & New Mela Summer in Southside Greenwich and Docklands International Festival	Imagine Watford Kendal Mint Festival Stockton International Riverside Festival

Some of the above events were part of the Without Walls consortium's ACE Strategic Touring Programme, while research for the Nutkhut led Mela & Festival Partnership North West project was commissioned and funded through ACE Strategic Touring Programme funds.

## 2. Question Set

Age	
Gender	
Ethnic background	
Are your day to day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?	
Do you live in the UK?	
Average drive distance from festival	
Postcode/ Mosaic group	
Have you been to an outdoor arts event before?	
Have you been to this festival/event before?	
Which of the following communications have you seen or heard before your visit?	Physical Digital Other
And which of these gave you the strongest encouragement to visit?	

<p>Which of the following describe your motivations for attending?</p>	<p>To spend time with friends/family</p> <p>For peace and quiet</p> <p>To be intellectually stimulated</p> <p>To be entertained</p> <p>To be inspired</p> <p>To celebrate my local community</p> <p>To do something new/out of the ordinary</p> <p>To learn something</p> <p>To enjoy the atmosphere</p> <p>For reflection</p> <p>To escape from everyday life</p> <p>The festival's reputation</p> <p>Outdoor arts/festivals are an important part of who I am</p> <p>I try to visit outdoor arts festivals as often as I can</p> <p>For academic reasons</p> <p>For professional reasons</p> <p>I wanted to bring my children</p> <p>Children wanted to come</p> <p>I like to support events in my local area</p> <p>I know someone who is involved in event</p> <p>I am involved in the festival</p> <p>Artists' reputation</p> <p>I've been before</p> <p>I like this type of event</p> <p>I happened to be here</p> <p>To see the library</p> <p>Other</p> <p>None, I just happened to be passing</p>
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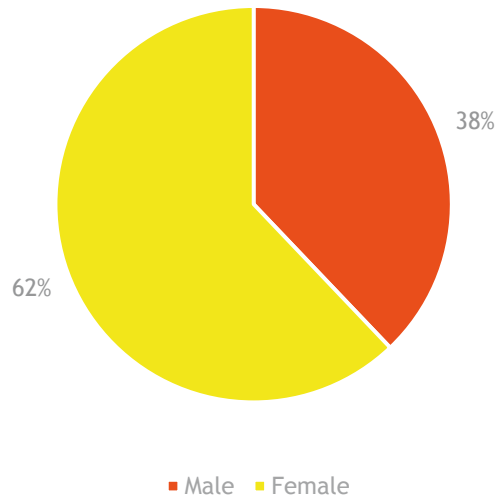
<p>How Did you rate?</p> <p>=</p>	<p>The whole experience</p> <p>How welcoming the staff were</p> <p>Signage around the event</p> <p>Information/materials on event/perfmce</p> <p>Ease of physical access around site(s)</p> <p>Quality of the performances</p> <p>Food and drink facilities</p> <p>Shopping facilities</p> <p>Value for money</p>
<p>This event helps to enhance the sense of community in this area</p>	
<p>This event makes a positive contribution to this area's image</p>	
<p>I feel safe at this event</p>	
<p>This event made me want to attend outdoor arts events in the future</p>	
<p>Has this festival made you more or less likely to visit [area] in the next 12 months, other than to attend this event?</p>	<p>Attended an art exhibition</p> <p>Attended a museum exhibition</p> <p>Attended a theatre performance</p> <p>Attended a classical music concert</p> <p>Attended a jazz performance</p> <p>Attended a pop/rock concert</p> <p>Attended other live music</p> <p>Attended other outdoor arts event/festival</p> <p>Attended a dance performance</p> <p>Visited a historic/heritage site</p> <p>Attended a cinema</p> <p>Attended the opera</p> <p>Attended the ballet</p> <p>Visited a library</p> <p>Performed or created Art</p> <p>Read a book for pleasure</p> <p>None of these</p>
<p>Which of the following have you visited within the last three years?</p>	
<p>Which of the following have you visited within the last 12 months?</p>	



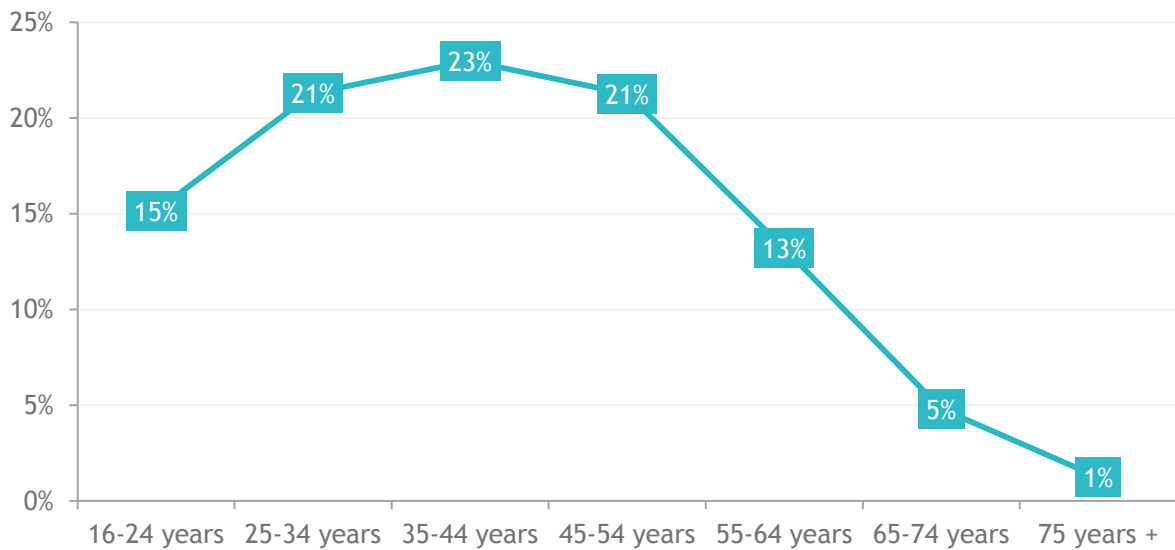
# 3. Results

## Demographics

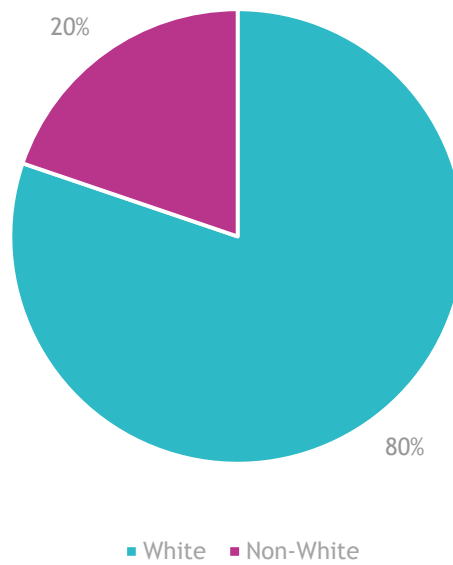
### Gender



### Age group

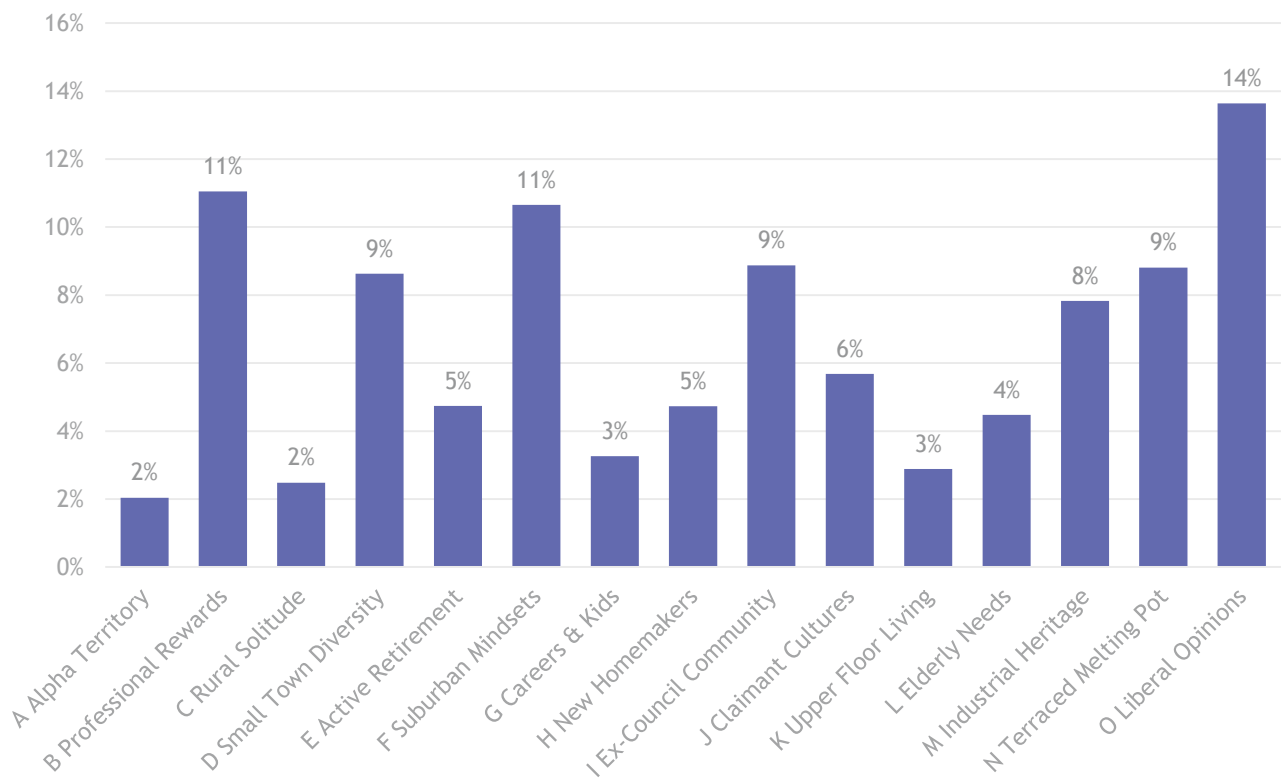


## Ethnic group

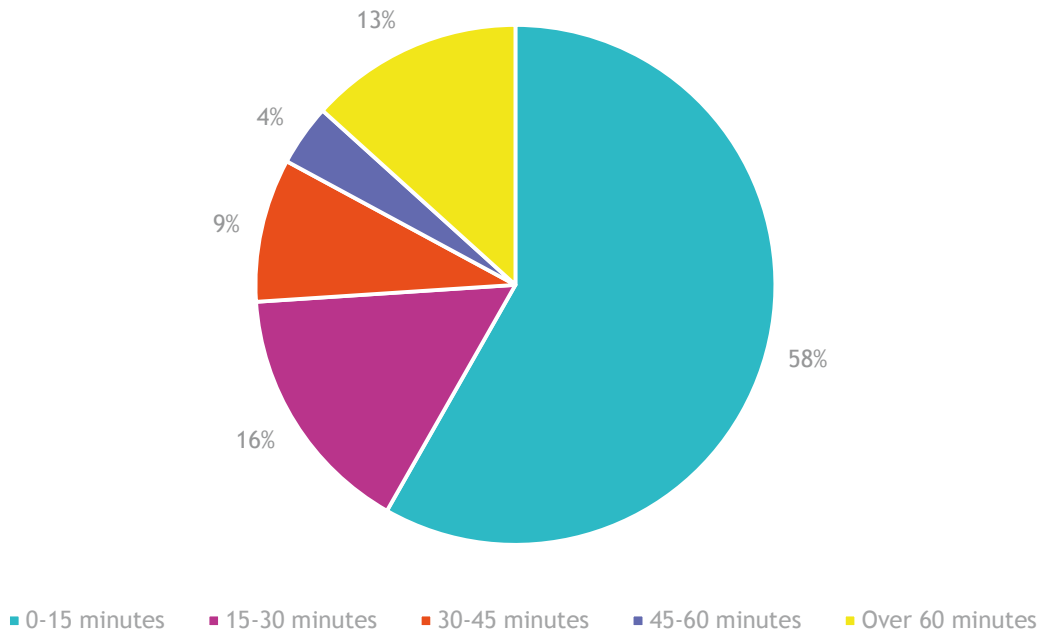


## Geo-demographic profile

### Mosaic group



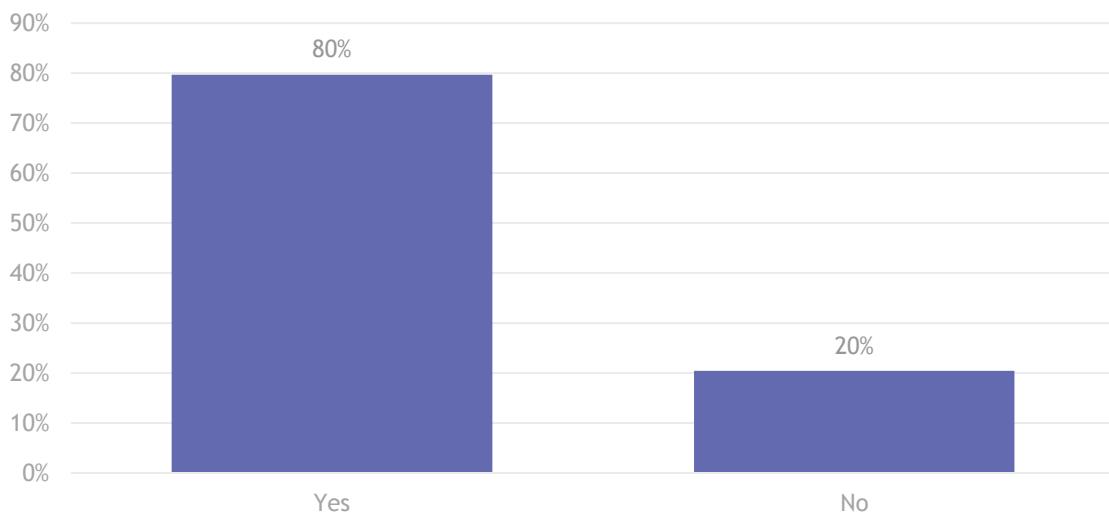
## Drive time



## Visit History

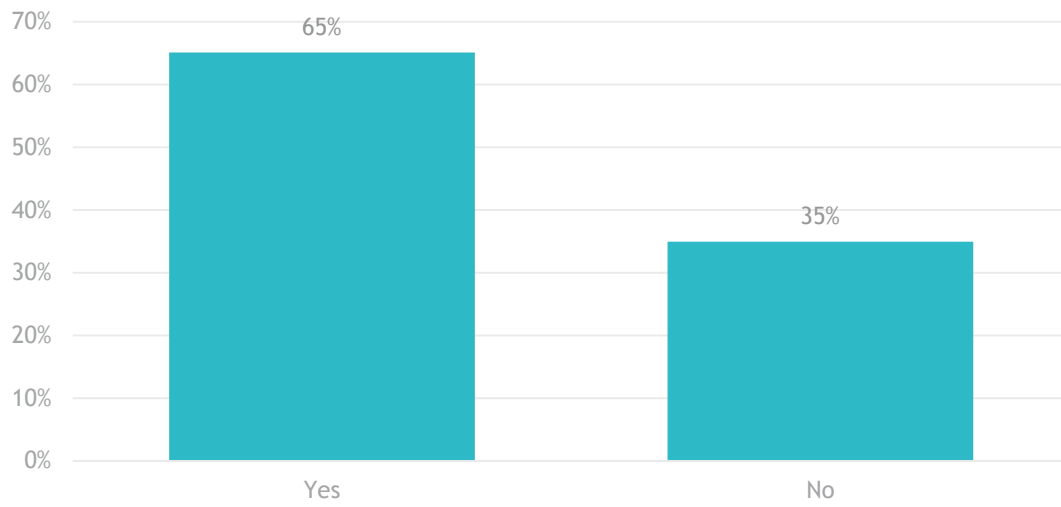
### Previous visits to an OA event

Have you been to an outdoor arts event before?



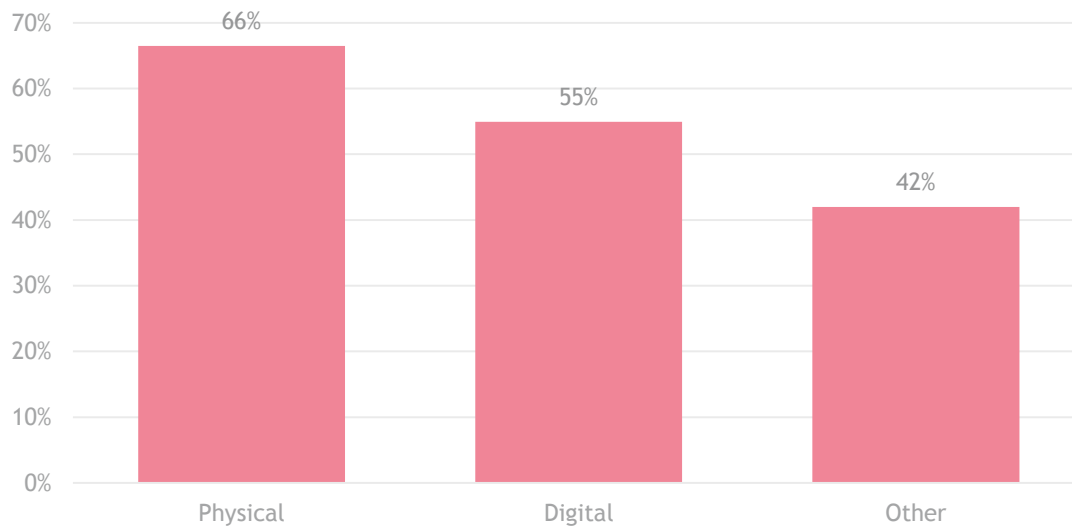
### Previous visits to [event/festival]

Have you been to this [event/festival] before?

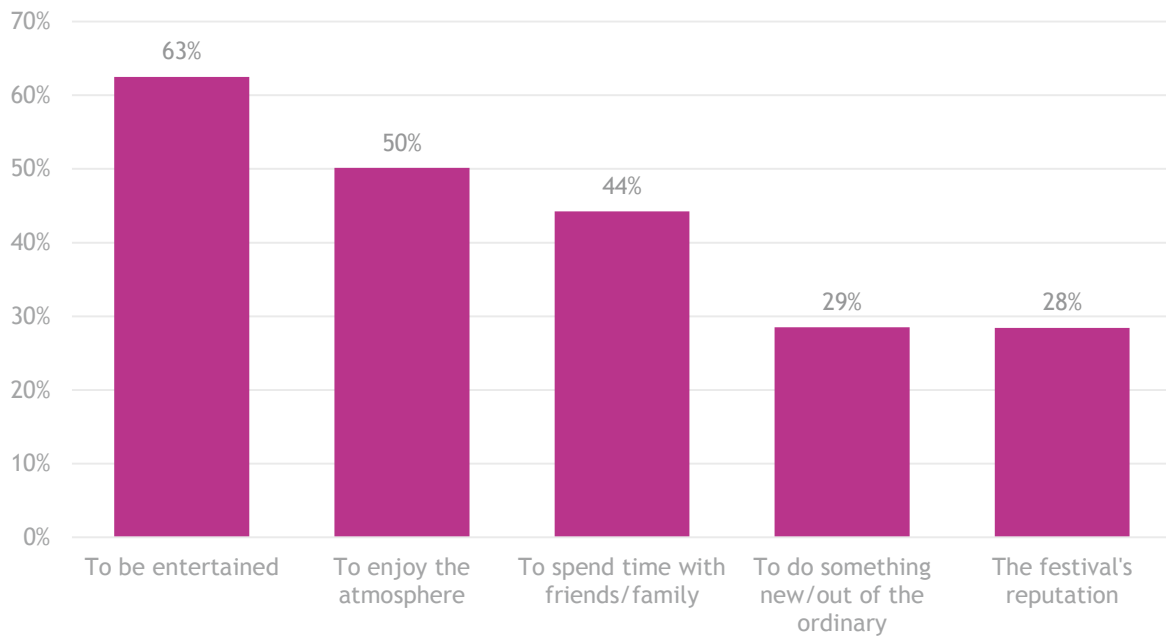


### Decision-making

Types of information sources seen or heard of before visit: Awareness

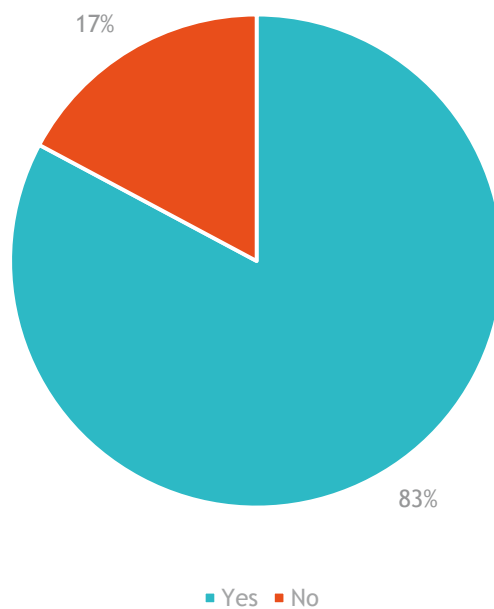


### Top 5 motivations for attending



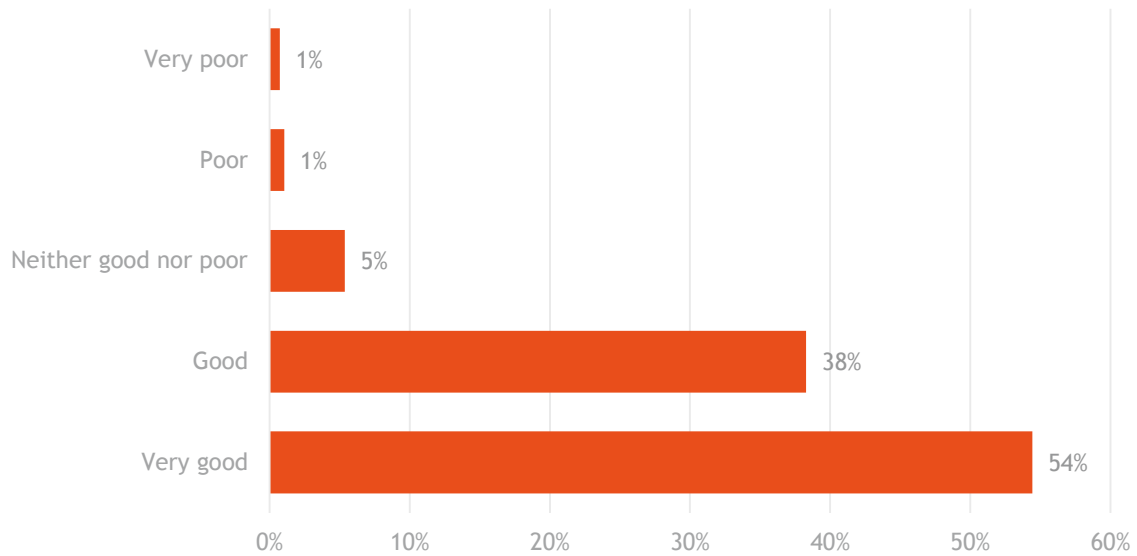
### Visiting in groups

Did you visit with other people?

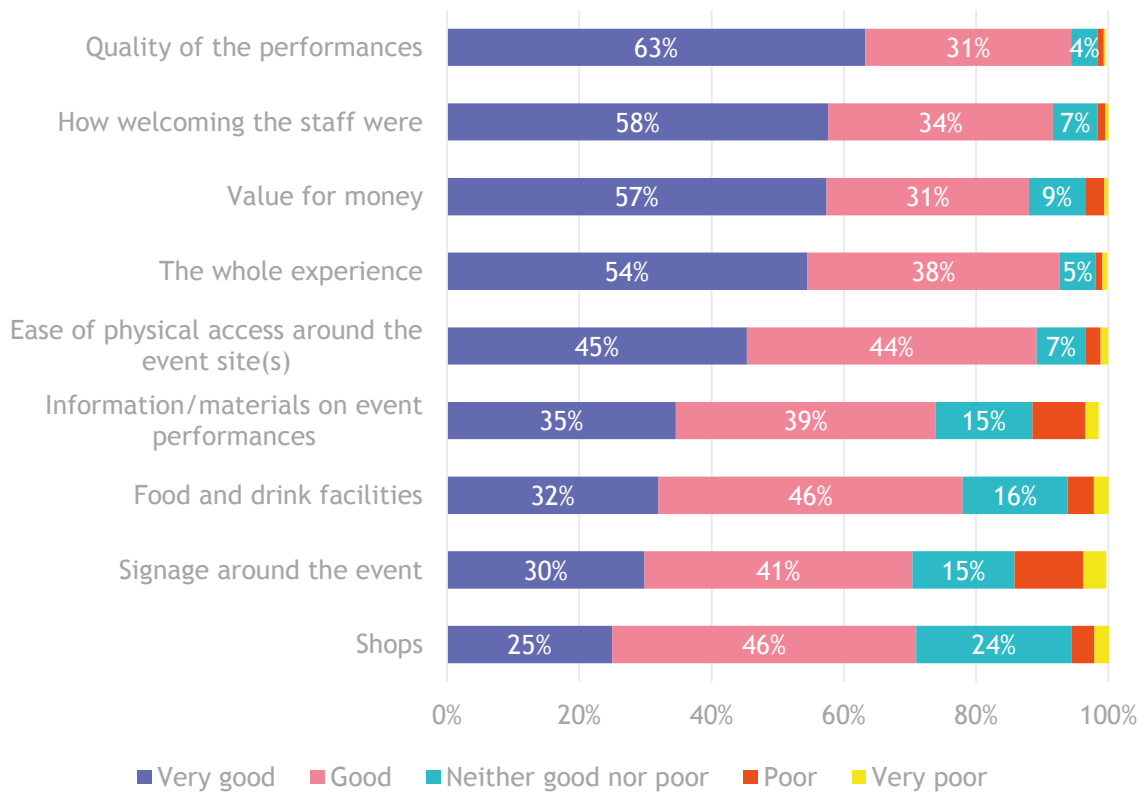


## Visit experience

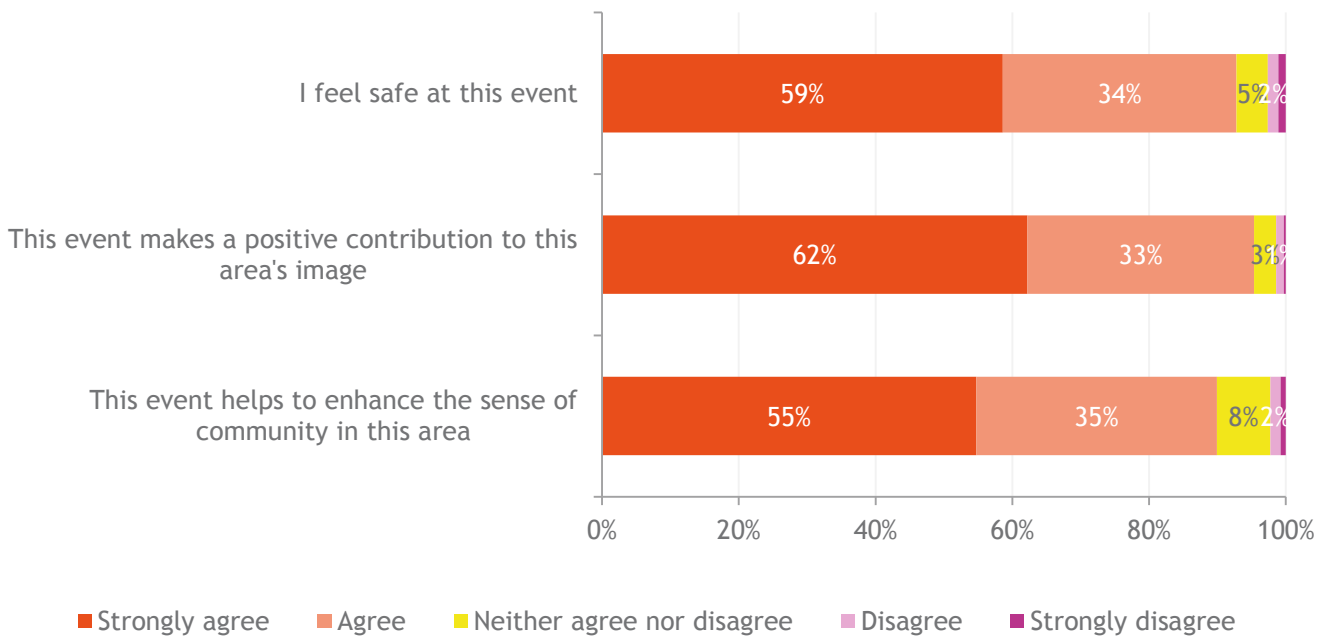
### Ratings for the whole experience



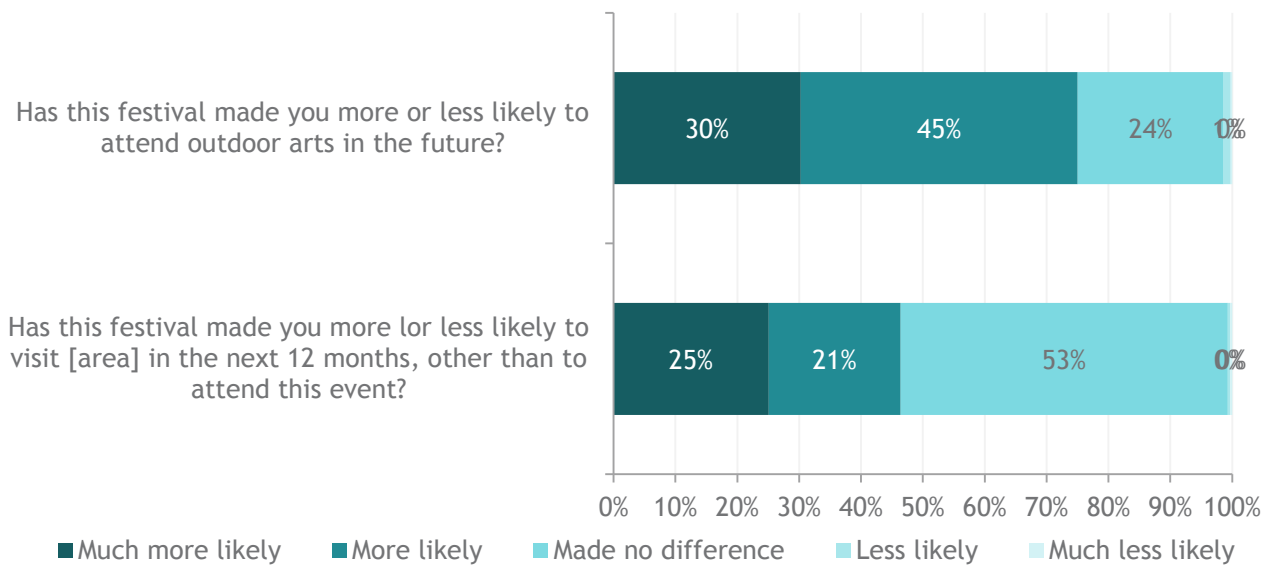
## Ratings



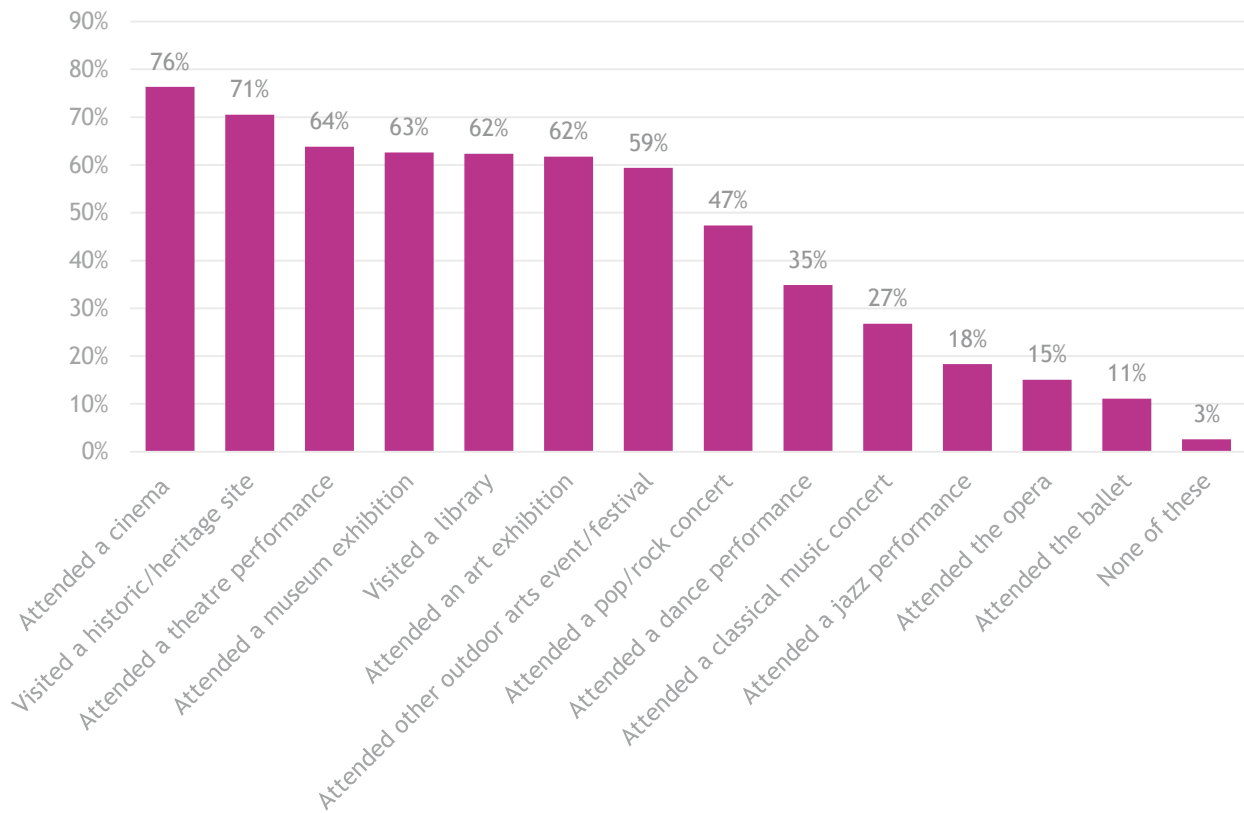
## Community impacts



## Future intentions



## Wider cultural attendance (12 months)





## 4. Comments & Qualitative Feedback

Most of the surveys in the OA sector cluster and others that provided results for the benchmarking included a question requesting further comments about their experience. The specific question asked in the OA survey template was: *Is there anything else you would like to say about your visit? (Please describe below)* in order to gain a mix of positive / negative responses. Some surveys included the question ‘any other comments?’ and some were more specific in asking what people enjoyed or would like to see improved for the future.

Many of these responses are specific to the events concerned and relate to individual elements or events, so here we have provided a few themes which emerged from a range of audiences across a variety of festivals and events.

### Experience

Many comments related to the distinctive experience of outdoor events. This often meant that comments combined opinions about the artistic and practical side of outdoor events, as by their very nature, the place and performance are frequently linked together. For example:

*I like the easy happy sense of community, not having the traffic enhances*

*This was [one of] my favourite things I've done in London... It was as you say Fuckin' brilliant!*

*People walking in front of spectators spoils enjoyment*

*A fabulous day, well organised and well thought out. I fear that it will become a victim of its own success in that too many people now wish to come as its reputation is growing faster than its facilities. Well done to all.*

*The sheer volume of people [...] spoilt the day for some people.*

This might include a ‘community feel’ or reference to place

*Seeing so many people out and about enjoying the event*

*Openness of people and freedom to express and enjoy. Inspiring, and meet people.*

*The XXXXX was one of the best I can remember. It had been scaled back but it was more localised and made more reference to our history in XXXX which was nice.*

*Very high quality, great to see it outdoors.*

*It's great to see things like this in our local area.*

## Information and mediation

A strong theme that emerged was a desire from people wanting better access, information and mediation. This meant both literally/practically in terms of understanding where things were and when they were taking place and in a more conceptual way of understanding who was performing and what they were trying to do. One of the strong arguments in favour of the outdoor arts sector is that audiences have low barriers to access, with many events emphasising the ‘pop-up’ nature in which audiences come across an event. Whilst this may be true, the other side of this is that many would like to know more about what they have ‘come across’ and how this relates to the event.

*I found the map not very easy to use and found it difficult to understand*

*It would have been good to have more information about the specifics (timings, routes etc) on the internet a few weeks in advance of the event. I did see the printed booklet which was useful but couldn't easily find information online when planning my day.*

*Wish promo materials were sent to schools before they broke up so that even more children could enjoy*

*Interact with the public! Don't expect them to find you.*

*Some of your stewards didn't quite know what was going on, but they were helpful, and put me in the right direction.*

*Signage, with children it is difficult to read the brochure. Needs to be more obvious, visual around sites.*

*With so many great acts to see accurate scheduling does help for an enjoyable day. Whilst we appreciate later in the day schedules may be affected by overrunning etc it is a little frustrating when the schedule is out of date before lunchtime*

*The children were a bit bemused at first, as not quite sure what to expect, or what was going on, but all enjoyed it in the end.*

*A little more explanation about what was going on. The beginning with the smoke seemed to go on for a very long time and we almost gave up at that point but obviously we are glad we stayed.*

## Artistic content and quality

The artistic quality of events was frequently well-appreciated. Those taking part in the research in the first year usually had an aim of presenting arts events which went beyond what might be thought of as ‘entertainment’ and audiences seemed to recognise this:

*It's also refreshing to find arts-driven activities to engage and entertain children vs. inevitable bouncy castle.*

*Gave friends' children nightmares but abstract imagery was brilliant*

*Both shows excellent - unusual to see 4 female acrobats*

*[Teacher]: even the most rebellious boys said it was the best school day ever*

In addition, the link between local community and events was something commented upon:

*The procession ending with the show in the estate was a fantastic experience and made me appreciate how nice XXXXX is for both its location and diversity!*

*It would be nice to be able to participate and not just watch*

*More opportunities for local, community groups to be involved*

The family focus of outdoor arts events was also often cited, with an appreciation that adults and children could enjoy events together.

*The atmosphere was really special and it was great to be able to spend time with good friends in such a lovely environment. I also loved the fact that there was lots to do for young children.*

Others referred to the 'unexpected' nature or the 'quality of performances' encountered.

### The weather

Inevitably perhaps, the weather made a regular appearance in attenders' comments, though it was usually seen as something the organisers couldn't do much about.

*Apart from the weather it is a lovely day*

*Shame about the weather, but out of anyone's control!*

*The weather was kind of funny but overall ok*

*Very brave to carry on despite the weather*

*Great day, weather helped to make it even better*

Whilst it might be easy to sideline this as a factor, nevertheless, as those working in this sector appreciate, the weather is something especially distinctive and shouldn't be ignored as part of the audience experience of outdoor arts.

## Further comments

*Wish it was more accessible. Already 6 people deep and you don't get in.*

*Middle back of crowd can't see performances.*

*Seeing so many people out and about enjoying the event*

*Openness of people and freedom to express and enjoy. Inspiring, and meet people.*

*It is quite lively and gives families with children a day to spend together, without spending too much money*

*Had difficulty using my wheelchair around. I ask for directions of a meeting point from a volunteer, but he seem not to know the directions or ask other volunteers.*

*Although it was another tremendous day ... there did seem to be too many people!!! The last few years have been perfect attendance wise. The sheer volume of people (and the harsh treatment of by 'security') spoilt the day for some people.*

*Well organised, despite growing every year. I noticed that they had catered for more people this year, very well. Never any trouble there, a lovely family day out (despite my children being 19 and 21, we all loved it)*

*Enjoyed the experience, understand want as many people as possible to be able to do the same but did feel it became overcrowded late afternoon*

*A fabulous evening spoiled by inability to hear the cast.*

*Hard for the children to see.*

*Acts were changed (performance space) no one notified, no one seemed to know.*

*Very high quality, great to see it outdoors.*

*Would be useful to have a programme*

*More info about what to expect today.*

*Bloody advertising! You put on a great festival but stupid rules on only being able to advertise on council websites mean you have no audience...Interact with the public! Don't expect them to find you.*

*Move signage and better marketing (- response to what would you improve)*

*Tourism office, not much information*

*Timings changed but were not informed. Missed some acts.*

*Space out acts so you can see everything*

*Prior warning, so can plan attendance (missed a lot that I would have wanted to see)*

*Boards telling what's on and where.*

*There were signs saying "Park in XXXX" but no sign showing where this was. There was no sign showing where the entrance to the car park was which meant we drove straight past it.*

*I found the map not very easy to use and found it difficult to understand*

*Directions from town weren't correct*

*Provide a bit more guidance at the venue as to where to sit/place chairs or blankets etc*

*It would be nice to be explained better, on Saturday couldn't see everything as too many going on at once.*

*Questionnaire too long*

*Road shut off is very good*

*More street acts between bigger events. Focus performances separate to ads in brochure.*

*We have been going to XXXX since it started, but it seems to be going more towards events that you need tickets for and less on acts that walk the streets and entertain.*

*I know that you're keen to keep this a free festival, but if people had to pay only a few pounds to get in I'm sure it would reduce the number of people, especially those who see it as an opportunity to sit in the sun and get drunk all day*

## 5. Audience Finder Outdoor Arts in 2014

ISAN is working with The Audience Agency on outdoor arts research across the country so that insights can be used to make a good 'case' for the sector as a whole as well as providing audience information for each organisation. In 2014 some aspects are being updated and changed in response to feedback and the learning obtained more generally.

### Research

- Survey questionnaires based on a template with common questions across the sector plus options for individualisation. Includes option for e-surveys as well as face to face.
- Short questionnaires for companies not able to be part of festival/event wide surveys.
- Where organisations have ticketed data, analysis based on extracted transactional data
- Use of secondary data for comparison and context

### Outputs and Reporting

Everyone who takes part will receive a report of their own research as well as the sector wide report. Each organisation will also be able to discuss their individual results and implications. As organisations take part year on year, this can also include looking at changes, trends and benchmarking within their own results.

Where there are enough organisations to make it statistically robust and there is something meaningful and distinctive about that group, we will also report at a 'sub-cluster' level.

The results from the second year will be presented at the ISAN 2014 autumn session.

### Training, workshops and seminars

For anyone signed up to Audience Finder there will be opportunities to attend up to three seminars for free during the course of the year. These will include: Economic Impact (delivered by BOP consulting), Cultural Tourism (delivered by The Audience Agency), Audience Profiling (delivered by The Audience Agency), Increasing Return on Investment (delivered by Baker Richards) and Digital Online Research (delivered by Culture24).

### For further information

If you have any questions, ideas or would like to take part this year please contact Jonathan Goodacre ([jonathan.goodacre@theaudienceagency.org](mailto:jonathan.goodacre@theaudienceagency.org)) / 07774 907099.

More information also at [www.theaudienceagency.org](http://www.theaudienceagency.org)

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