Audience Finder: Outdoor Arts

Year 1 Report Summary

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

This report is based on primary research carried out with a number of outdoor arts (OA) organisations as part of Audience Finder (AF). Some other outdoor arts events taking place in 2012 and 2013 which had been involved in The Audience Agency's work have also been added to this analysis where the methodology is consistent and the results useful for inclusion or comparison.

Key questions for the Outdoor Arts sector

The design of the 2013 research was formed in consultation with ISAN (and the Without Walls consortium).

Together, we prioritised the following research questions

1. How far does OA reach parts 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 these questions. Therefore, in year 1, we have found useful answers to questions 1 and 2 and formulated ideas and potential innovations for 3. Year 2 will be an opportunity to tackle the more specific issues further on the list.

Year 1 Methodology

- Modular set of standard questions
- "Handbook"
- Core questions
- Actual attenders
- Preference interviewer-led/ volunteer training
- E-survey to complement face to face surveying
- Upload to interface
- Mosaic+ analysis of postcodes
- (will be) comparable with other sector analysis
- Not currently weighted and not sub-clustered so currently showing "mythical average festival"
- Other events undertaking their own surveys kindly shared their topline results with The Audience Agency with results informing the overall assessment of the year

The Findings

Twenty-nine organisations and their associates took part in the research, covering over forty events between May and October 2013, across all nine English regions. A total of 7,516 people were surveyed.

Here, we concentrate on the key issues identified with the sector that the 2013 research enables us to answer, in particular: ***"How far do OA reach parts 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 is known about other "indoor" artform audiences.

Comparators/benchmarks

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 of **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
- **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 following narrative assertions.

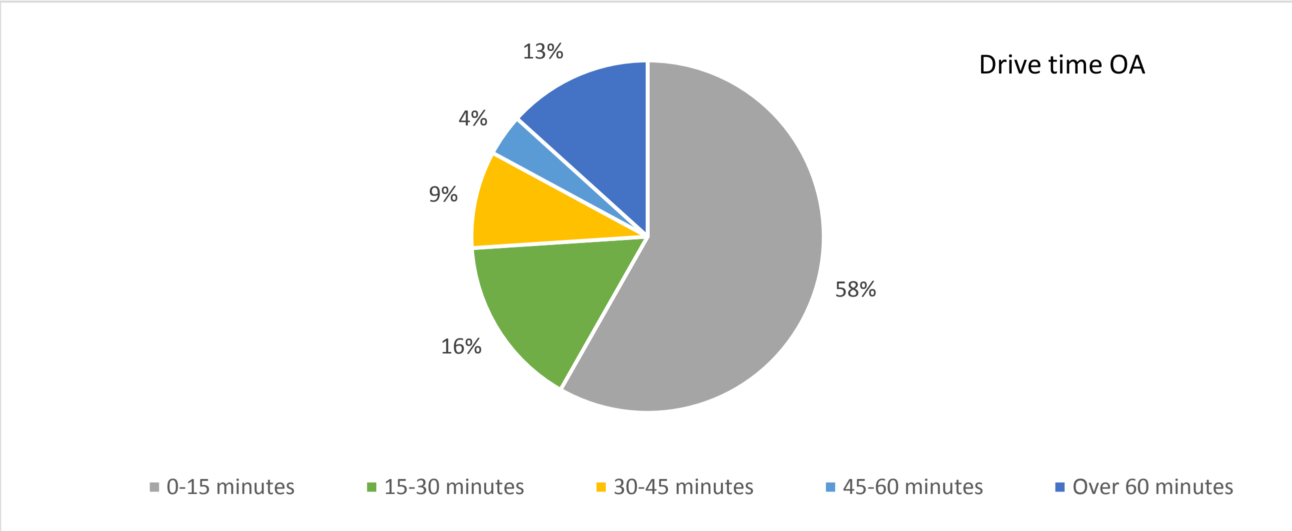
Localness

Consolidating the stark findings of the 2012 research for Showtime, our research demonstrated that audiences for OA were, by and large very "local", travelling 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 60%[1] of audiences coming from within a 15 minute travel distance, compared with arts centres 49% and Opera and Ballet's 20%. This reflects the Showtime finding which was starkly different to those for other London indoor arts.

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

Mosaic Demographic-lifestyle Profiles

Mosaic[2] 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.

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, with far less dominance of "usual suspect" audiences for the arts; in particular groups A (Alpha Territory) B (Professional Rewards) and O (Liberal Opinions) account for over 60% of indoor arts audiences[3].

OA is also successful at attracting often absent groups like Ex-Council Communities, Claimant Culture and Industrial Heritage.

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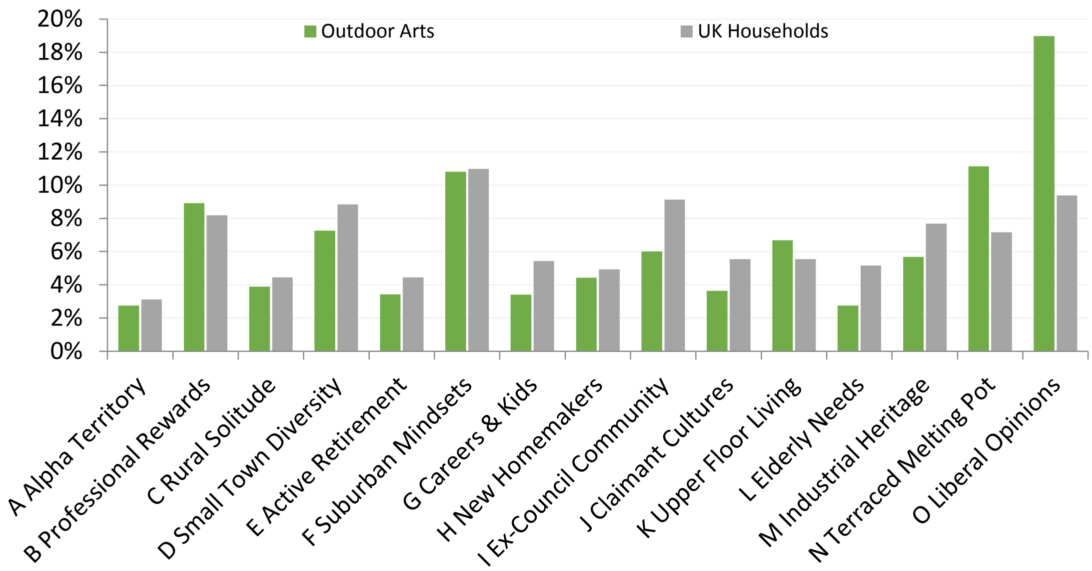
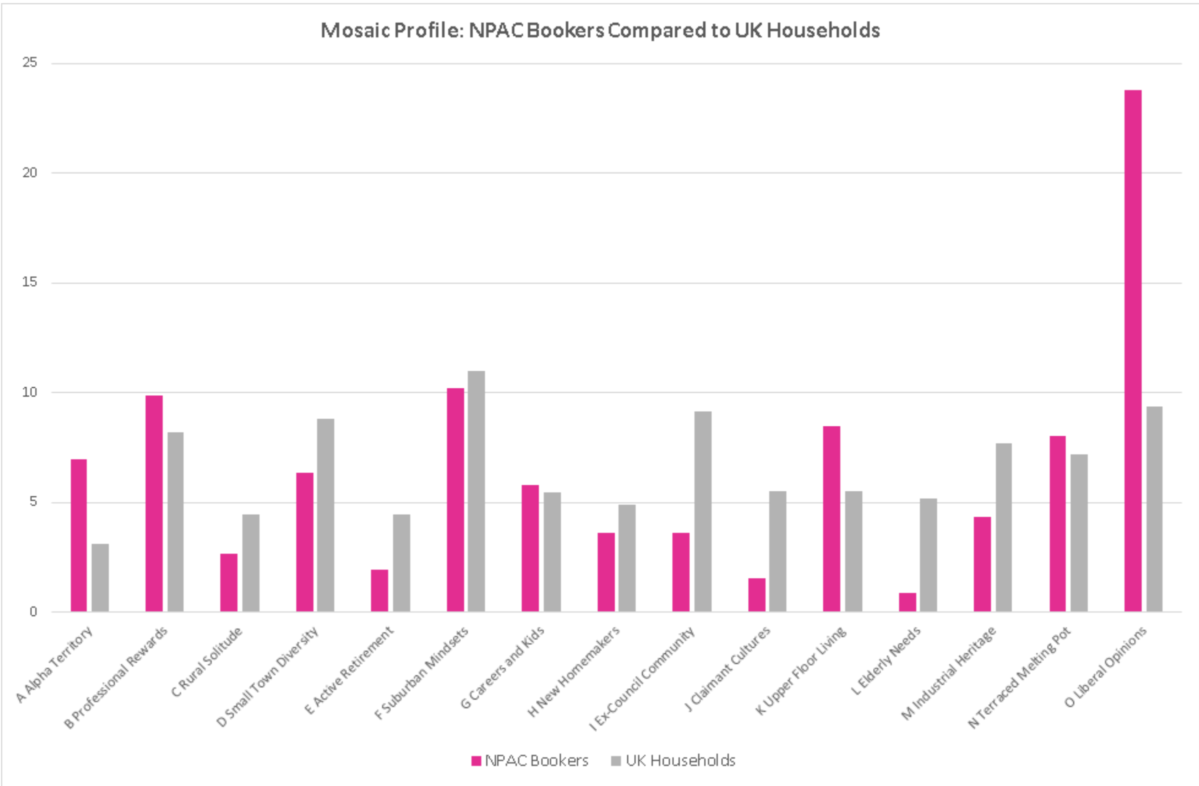
[2] Find full details about Mosaic and the profiles here: http://www.experian.co.uk/assets/business-strategies/brochures/Mosaic_UK_2009_brochure.pdf

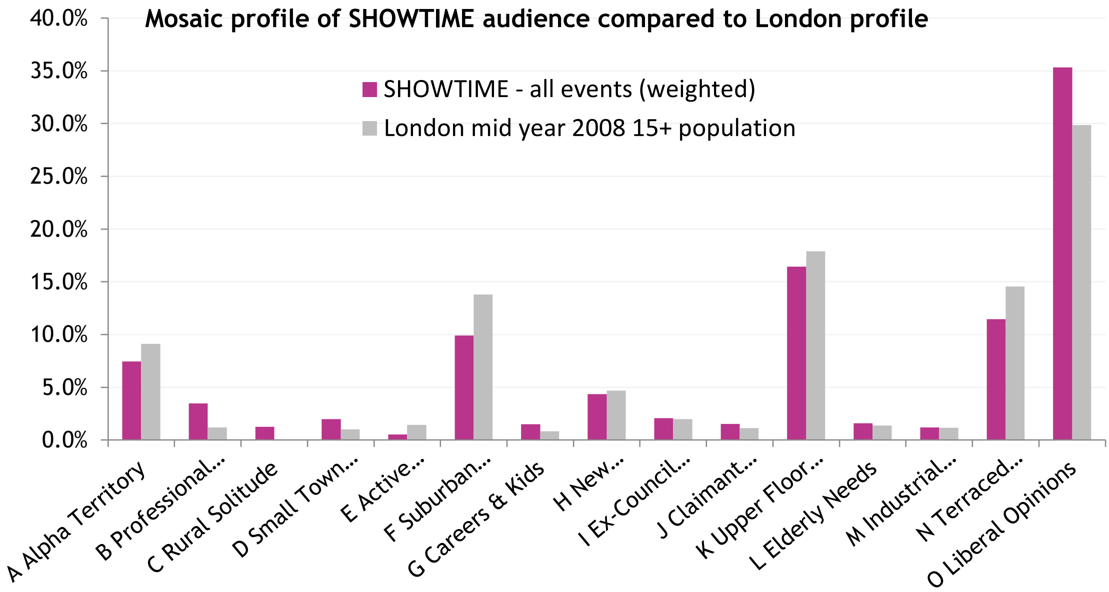
[3] Year on year profiles for London audiences, Snapshot London



The graph above shows how the Mosaic profiles of OA audiences compare to the background UK population as a whole, whilst the one below compares how arts centre audiences compare with the background UK population.



The large sample from Showtime – 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[4], tells us that unusually, OA Audiences are dominated by what is known as "somewhat engaged" audiences. This category characterises people as having 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 for.

Most respondents to the OA survey 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.

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 social benefits. This is NOT to say that the quality of cultural experience has no importance – far from it.

The top 5 reasons people give for attending reflect an interest in a social experience but linked directly to the OA experience. Motivations such as "to be inspired" or "to be intellectually stimulated" score far lower – though in similar studies[5], they are dominant,

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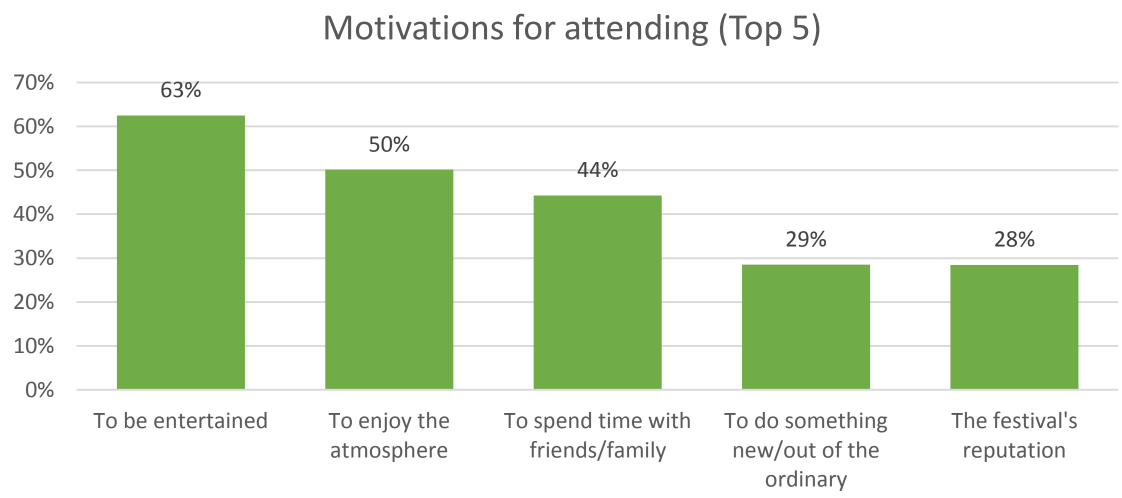
[4] Arts Council England's segmentation of the population by their interests in the arts; www.audiencefinder.org for profile information.

[5] Eg Snapshot London Performing Arts

similarly “professional” motivations 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. Generally, the longer established an event, the better the ratings were for information.

Cultural Tourism & Economic Impact

The relatively low numbers of people generally attending from outside a region do challenge the notion of OA as a driver of cultural tourism. This is further evidenced by the fact that the motivations people listed are not consistent with the range of benefits sought after by cultural tourists. There are some variances amongst the events researched, particularly where those events have a tradition of attracting people to seaside resorts in which festivals are taking place. This particular effect could be usefully investigated further in years 2 and 3, looking particularly at how the cultural offer may be influencing the decision making of the visitors to that area.

It should be noted, however, that no cluster within AF has yet shown much more than 10 – 15% of audiences coming from over 60 minutes’ drive-time, so OA is not unusual.

The economic impact of in-region tourism and local visitors should not be under-estimated, however, and OA festivals and events which undertook comprehensive economic impact research can demonstrate a positive effect.

Sense of Community and Social Impact

We proposed a number of 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?*

Few organisations opted for these questions, so results are inconclusive, though it appears a majority said events built a sense of community – a minority said they would make a difference in attracting them back to an area. It is proposed that this receives a greater emphasis in Year 2.

The Implications

So what are the implications for the whole 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, working 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 impacts 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[6] would all encourage experimentation in community based crowd-funding or other forms of small-scale donation and fund-raising but linked to a local agenda.

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

[6] Returning audiences are strong, at 80%.

- Facilitate families and larger groups, make it easy for them to navigate the programme and space: their needs are different from other attenders
- Aid instigators, or those organising large groups, 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?
- Capitalise on strengths to engage wider audiences: use local partnerships, engagement gateways like local employers, schools and social groups to build new audiences.
- Do 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.
- Roadtest communications (and signage) with audiences, and include some new/non-attenders

These suggestions also reflect a possible need to focus on communication and navigation which the experience ratings 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 information 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, on mobile. As is clear from ratings and comments, what is obvious to the organisers and even to regular attenders is frustratingly unclear for audiences
- 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

Recommendations

ISAN and The Sector

Explore the following:

- Lobbying based on local (social) impact
- Explore needs of stakeholders and relate to ISAN's PR and Catalyst Campaign
- 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

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:
    - community engagement (inc. crowd funding and other local activism)
    - audience-focused communications, family friendly
    - 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 The Audience Agency's Economic Impact Toolkit http://www.eitoolkit.org.uk/

2014 Outputs and Reporting

Each organisation which takes part will receive a report of their own research as well as the sector wide report and 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 Audience Agency will be working with ISAN to produce sector wide results which especially help to make the case for outdoor arts. The results from the second year will be presented at an autumn 2014 session of ISAN.

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) / 07774 907099.

More information also at www.audiencefinder.org