

Audience Finder: Outdoor Arts

Year 2 Report (May – November 2014)



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Introduction

This report provides an overview of the research undertaken into audiences for outdoor arts (OA) as part of the Audience Finder initiative in 2014. It was the second of a three year project which will draw to a conclusion in 2015/2016. Detailed results are contained in the appendix, with the main conclusions and implications outlined in the body of the report. The views are those of The Audience Agency and whilst they are based on the evidence and provided in a clear argued way, some elements may be open to different interpretations and perspectives.

Rather than being an academic exercise it is part of an initiative which aims to be useful and relevant to the sector. So where possible, we explore implications and make recommendations for stakeholders and those working in OA.

We are very grateful to those who contributed data and made this initiative possible, especially the Independent Street Arts Network (ISAN) which has been our main partner for this sector cluster.

Audience Finder Outdoor Arts Sector Cluster in partnership with ISAN

Audience Finder is a national initiative funded by Arts Council England and designed by The Audience Agency to help arts and cultural organisations to understand their audiences. By using consistent standards of research and data collection it helps organisations to consider the implications for their work and planning. Using a national framework, it enables comparable audience information to be collected, using industry measures and benchmarks alongside tools and support to help cultural organisations put this knowledge into practice.

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?

It is a 'give-and-gain' model in which organisations agree to align and share audience information for greater insight. Co-operation in clusters makes it possible to look at the shared needs and agendas of similar organisations, working together to discover elements in common. The OA sector cluster is a partnership with ISAN, which has acted as an adviser, interpreter and disseminator of the project. In addition, there was significant data obtained through the 'Without Walls' consortium and their Strategic Touring Programme initiative working with an

Associated Touring Network. This research has also been supplemented by some organisations commissioning bespoke research from The Audience Agency.

By the end of 2015, three years of research will have been undertaken into a wide range of OA activity. At this point (end of Year 2) 17,000 individual survey responses have already been achieved, making it one of the largest and most comprehensive research projects undertaken into OA anywhere in the world.

What is Outdoor Arts?

There are several competing and overlapping ideas and definitions of OA. For this research we have used the ISAN definition which is:

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.

A fuller definition and description can be found at <http://www.isanuk.org/outdoor-arts/>

Key questions for the Outdoor Arts sector

The design of the research was formed in consultation with ISAN in order to ensure that the research 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?

The circumstances in which OA takes place has meant that it hasn't been possible to answer all seven questions in depth. Nevertheless, we feel we have good answers to Questions 1, 2, 3 and 6 and have some indications about the others.

Headlines

The headlines from this year's report are:

- With just over 9,500 responses in Year 2 (2014), this is probably the largest and most comprehensive quantitative research project into OA undertaken anywhere in the world
- Over two years, more than 40 cultural organisations have taken part, with over 17,000 individual audience responses received
- The results have provided confirmation of some key findings from Year 1 and are now understood with greater depth and detail

In terms of the findings, especially worthy of note are:

- OA attracts a diverse and wide ranging audience, many of whom rarely attend arts events. It is more representative of the population as a whole compared with other artform sectors.
- Audiences are local, 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
- The social experience is an important part of the appeal of OA
- There is a strong association between OA and the places it happens, with this activity being seen as contributing to a wider sense of civic pride and community cohesion.
- Audiences rate OA events highly across a range of areas including the quality of performances and the experience overall
- Areas which organisations in the OA sector could explore in order to improve their work include better information provision, both practical communication about timetabling and signposting and in the more extended sense of context and detail about the acts, performers and performances themselves.
- In some places, audiences are expressing a desire for more opportunities for interaction between artists and public and for more community participation and opportunities to perform and take part.

For the future:

- The way in which artists and companies undertake or benefit from the research needs further consideration.
- Several areas have been identified for further research either as part of Audience Finder or in other research projects. These include taking a closer look at intrinsic and social impacts of the work and a more in depth understanding of the nature of the artistic experience.

The Research

This report is based on primary research carried out through the OA sector cluster of Audience Finder. It involved organisations selecting from a standard menu of questions so that there were both standardised questions which could be benchmarked and also individual flexibility for each organisation. A few organisations which used their own questions and methodologies have been added to this analysis where the questions/responses are the same and could be properly compared. In Year 2, there were fewer of these than in Year 1, as many organisations moved over to the Audience Finder template in Year 2.

Methodology

In striking a balance between standardisation of questions, responses, sampling and pragmatic flexibility, this methodology was used:

Standard questionnaire template

- Core set of 10 demographic questions comparable with other sector surveys
- Modular set of standard questions comparable with other sector surveys
- Collection of comments and qualitative feedback
- Short survey based on standard questionnaire but with a few questions usable in a postcard self-completion format or quick interviewer led format
- Handbook with clear instructions for users
- Production of surveys either as paper printed or e-surveys for use by organisations
- Online interface for organisations to upload their data and dashboard for observation of results
- Collection of postcode data to enable analysis using geo-demographic lifestyle profiling

Organisations collected data through interviewer-led surveys undertaken by staff or volunteers with guidance provided to support this process. In some cases, the short questionnaire was administered as a supervised self-completion survey.

The results presented here are not weighted but in summarising most questions either an average (mean) overall results or occasionally an ‘average of averages’ has been used in order to provide a fair representation of the different sizes and types of events to strip out unusual outliers or other biases. We are confident that the good responses and samples received across all organisations makes this a rigorous set of results.

From Year 1 to Year 2

25 organisations (see Appendix 1) took part in the Year 2 research, with the majority having continued from Year 1. However, there were several new organisations taking part and some moved from their own survey sets to use the Audience Finder template. In Year 2, greater emphasis was placed on obtaining good numbers of responses at each event and this sometimes meant shorter and less sophisticated questionnaires. However, we feel this was compensated for by greater robustness in the data and a more comprehensive overview of the sector.

As far as possible, the questions/responses used were carried over to Year 2 so that trends analysis could be completed. However, some questions were modified as a result of feedback and reflection on the Year 1 set.

Another key difference from Year 1 to Year 2 was the use of Audience Spectrum (see Appendix 3) in this analysis, which is The Audience Agency's own geo-demographic profiling system. This has been used alongside Mosaic and replaces our use of Arts Audiences Insight. The Year 1 data has been retrospectively profiled with Audience Spectrum to provide a greater depth of comparison.

Cultural and Operational Challenges

The OA sector is in reality a loose collective of artists, producers, festival organisers, community leaders, local authority officers and many more besides who come together to make extraordinary outdoor arts experiences. All need to know different things about their audiences. In Year 1, we argued strongly that stakeholders should not ask arts organisations to collect data 'for the sake of it' and acknowledged that it was difficult for small scale companies and artists to undertake research. A consequence of this is that companies and artists need more research outputs and the sector and stakeholders that support it need to work together to ensure that artists and companies have the audience insights that are useful to them.

Future work

As a result of the analysis from the first two years we now have a stronger sense of what we do *not* know. ISAN and The Audience Agency have discussed how future collaboration might enable us to grapple with these 'unknowns' or 'little-knowns' with more depth, through extended and more finessed research initiatives (see Next Stages below).

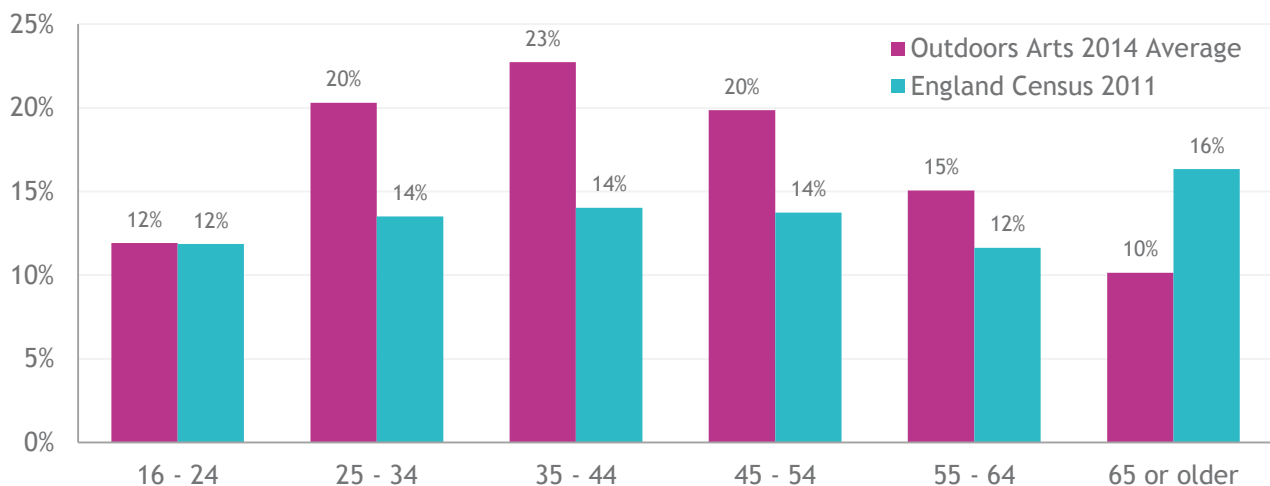
The Findings

The main findings can be found in Appendix 2. Here we concentrate on the key issues which have been identified and have relevance for stakeholders and those working in the sector.

How diverse and representative are audiences of their communities?

There are different ways of looking at this question, with answers to questions asked or as part of a geo-demographic profile. In Year 2, this confirms the Year 1 results that OA is remarkably successful at attracting a demographically diverse audience which is representative of their catchment areas.

In terms of age for example, OA audiences are of mixed ages, and is particularly strong in the younger and middle age ranges. This is much more marked than for other artform audiences¹.

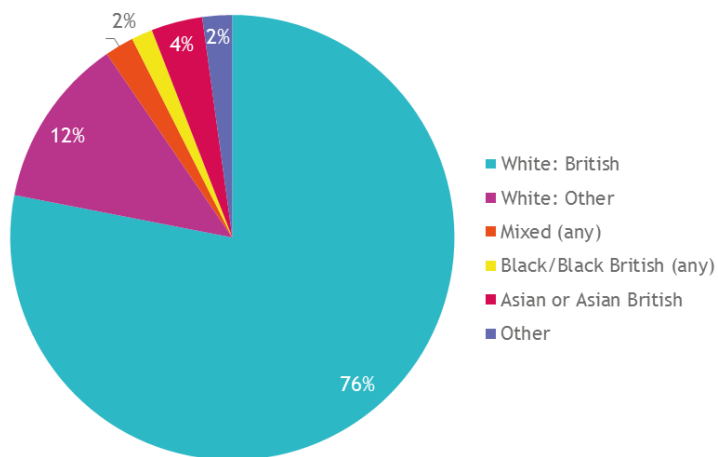


Please note that the graph above does not include the under-16 age group

As with many other metrics in this report, the research results here are compared with the overall English population. The emphasis on the younger age categories carries through to other aspects of the analysis connecting to the nature of the visit which is often in groups with families and friends, with an OA visit being seen as a collective experience.

OA is also ethnically diverse, representing a broad range of people from different ethnic groups. This year, it was slightly less diverse than Year 1 in terms Black and Minority Ethnic Diversity which may be due to having fewer Mela and Carnival events in the Year 2 results.

¹ Eg. compared with Audience Finder Visual Arts

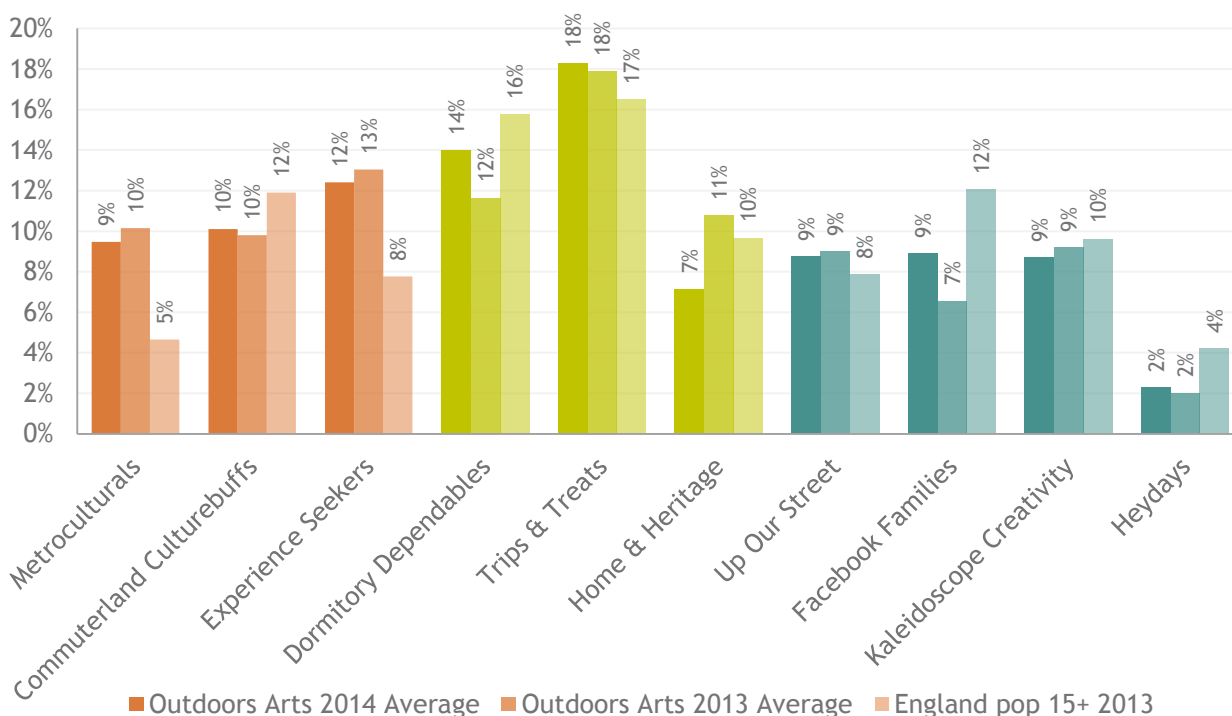


Worthy of note here is the ‘White Other’ category. From research undertaken with individual organisations, this appears to include some tourists but also many who are recently resident coming from Europe and Eastern Europe in particular.

Another way of looking at the diversity of the audience is to look at

the geo-demographic profiling of the audience. **Audience Spectrum** is a profiling system developed by The Audience Agency which uses attitudes and attendance in the arts and culture as a distinguishing factor alongside other public and commercially available demographic data. It splits the population into 10 groups by taking the postcode of each attender and matching it to the profile of the people living in this area (see Appendix 3 and <http://www.audiencefinder.org/audience/audience-spectrum-summary>)

This is the Audience Spectrum profile for the OA sector for both Years 1 and 2 with a comparison to the English population as a whole.



What is remarkable about this graph is the way in which it shows the range of groups represented. The groups are arranged with the groups that are normally the highest arts

engagers on the left and the lowest engaged on the right and the mid-engaged in the middle. By comparing it to those who appear in the population as a whole it is clear that OA is attracting an audience which is broadly representative of the population. It is unusual to see such high representation from 'Up Our Street', 'Facebook Families' 'Kaleidoscope Creativity' in arts audience profiles, demonstrating the capacity for OA to reach an audience that other artforms rarely reach.

In terms of the types of profile represented it is worth describing the groups which have a high index compared to the population as a whole: the 'Metroculturals', 'Experience Seekers', 'Trips and Treats' and 'Up Our Street' groups.

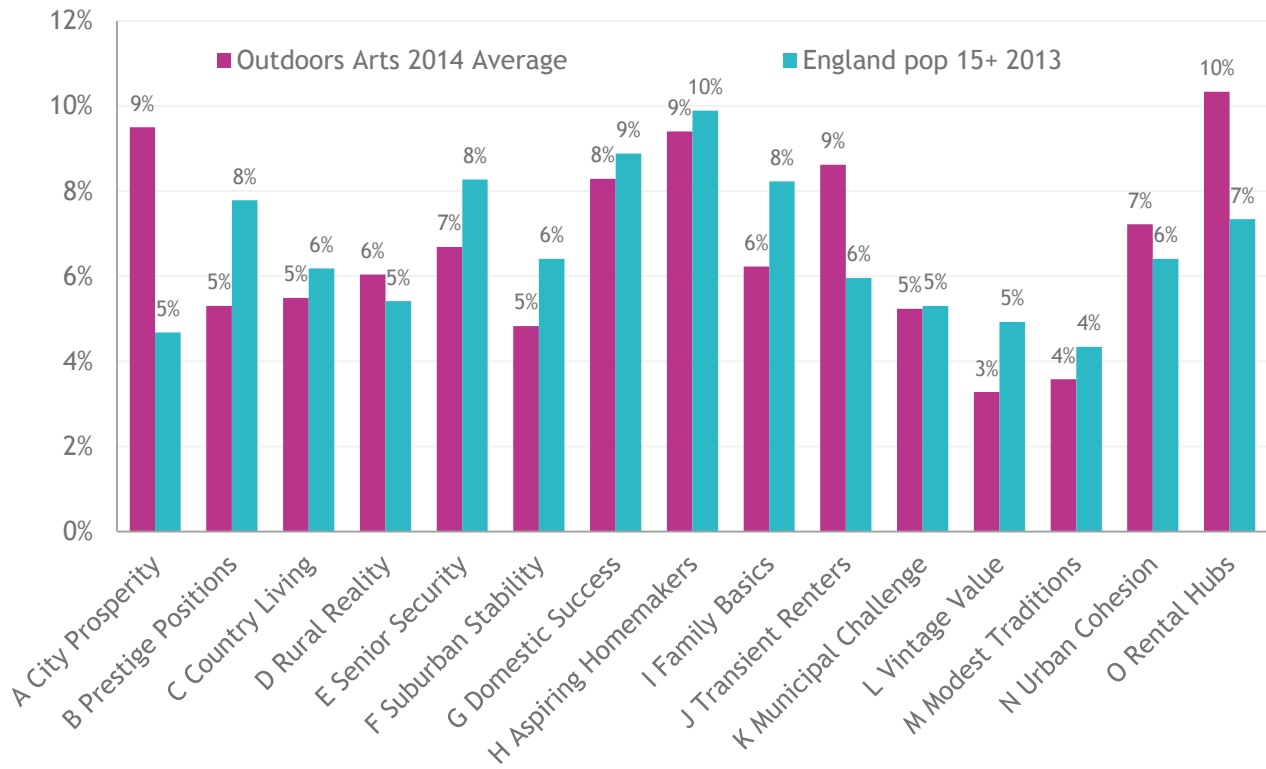
Metroculturals are a mixed age-range group with a relatively high proportion of singles, living in city centre locations in areas of prosperity and growth. Metroculturals are the best prospects for arts attendance and participation, though competition for their attention is fierce. They are confident in their own knowledge and tastes and expect their needs to be addressed accordingly. Although many enjoy classical works, Metroculturals represent the best prospects for new work and cultural innovation. Their recommendations may influence less confident and pioneering audiences.

Experience Seekers are highly active, diverse, social and ambitious singles and couples and younger people engaging with the arts on a regular basis. Interests cover mainstream, contemporary and culturally diverse offers and attending is at the heart of their social life. They are mostly in search of new things to do and have disposable income to spend on a variety of leisure activities like sports/arts memberships, visits to cafes, bars and restaurant. Typically digitally savvy, they will share experiences through social media on their smartphones and are keen to share this information.

Trips and Treats are suburban adults and families living across the UK on the edge of major conurbations, towns and cities, enjoying active lives which involve arts and cultural engagement for predominately social and educational reasons. This group are strongly led by their children's interests and influenced by friends and family. With a preference for mainstream arts and popular culture like musicals and familiar drama, this is mixed in with days out to museums and heritage sites.

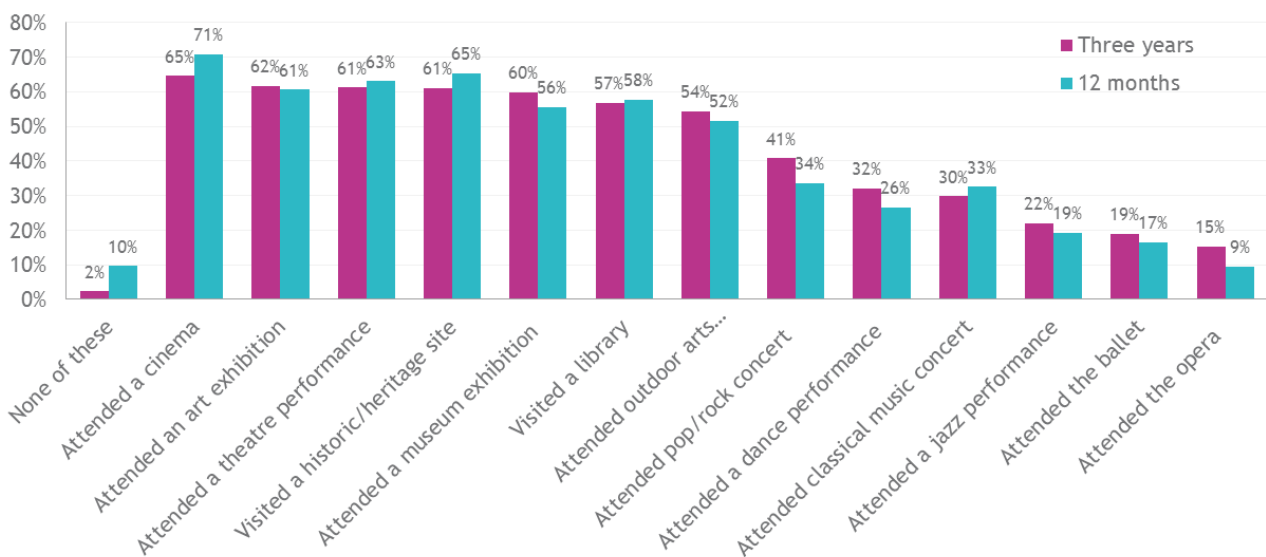
Up Our Street are older couples, families and singles who are well-established in their local, terraced-street communities. The majority live in or just outside towns and smaller cities. They are not frequent attenders of the arts but they are open to persuasion for the right offer in their area, perhaps with the encouragement of others in their community. This might include locally based activity that represents value for money and is considered lower risk.

This wide base of the audience can also be seen in the Mosaic profiling system, which is the well-known commercial and lifestyle profiling system produced by Experian.



Again, what is notable is the spread of the audience across a wide range of groups.

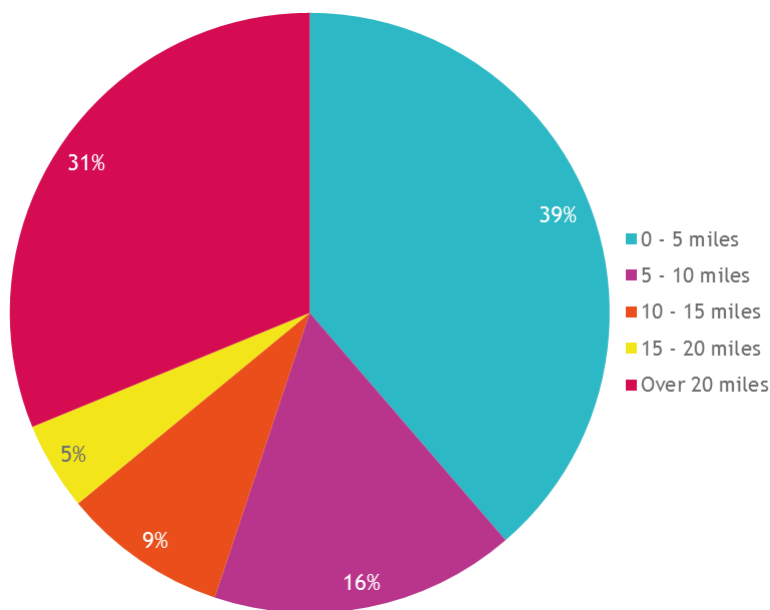
Another way of looking at the cultural interests and backgrounds of the audience is to consider their answers to the question about other events which they attend ('which of these have you attended in the last 12 months/3 years?') which is shown in the graph below.



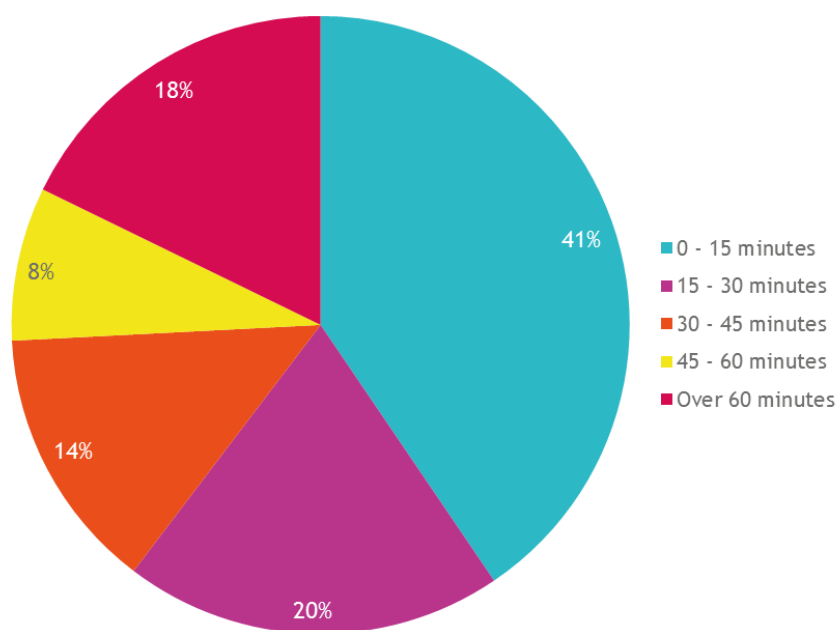
Whilst many had attended a range of artistic activity, there were significant parts of the audience for which arts attendance is not a regular activity, with 10% not having attended any other arts activity in that year.

Location

By mapping postcodes it is also possible to know the distance that people are travelling to the event. We can see that 39% are coming from within 5 miles of the event and 69% from within 20 miles.



It is also possible to map this as 'drivetime' which is the amount of time it usually takes to drive to the event location.



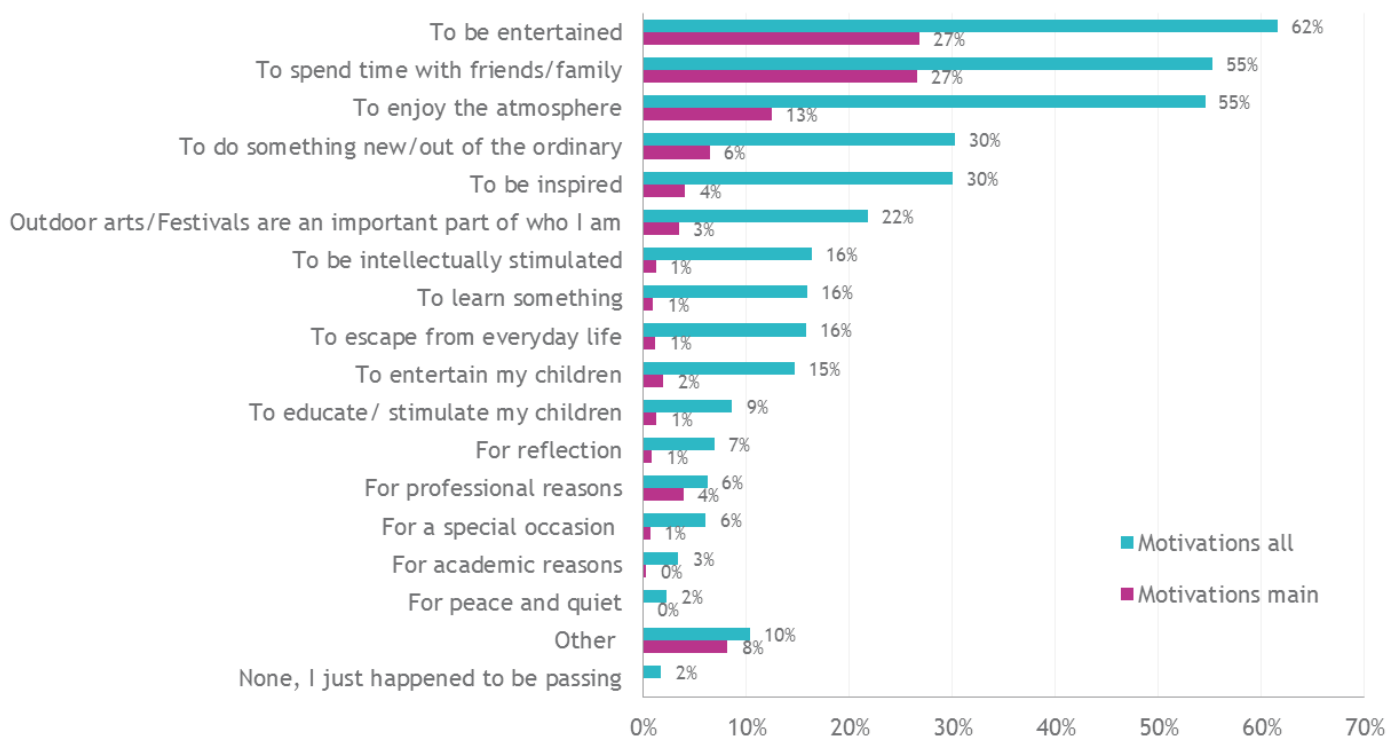
As with last year, it seems that OA audiences live locally, though the results in Year 2 show a slightly higher number of people travelling at a greater distance than in Year 1.

Further analysis is required to understand why there is this change although it may be due to there being more large-scale, high-profile festivals in the data set this year which are attracting a more geographically dispersed audience.

This ‘localness’ connects with other aspects in the research which shows an important connection between place, community and OA events.

Reasons for attending

In Year 2, more organisations asked the questions about reasons for attending. This, combined with other questions and comments gives a clearer sense of the motivations of the audience, largely confirming what was discovered in Year 1. The way in which this question is formulated asks people for ‘any reason’ and the ‘main reason’ for attending which provides a better sense of the different elements involved in an OA attendance.



The top motivation of ‘to be entertained’ and ‘to spend time with friends and family’ are also important overall as parts of the event. These, alongside the other motivators of ‘to enjoy the atmosphere’ and ‘to do something new/out of the ordinary’, helps us to understand the peculiar combination of factors of a successful OA event - the combination of social and entertainment, but also something that is different and out of the ordinary.

This is also illustrated in these sorts of audience comments:

“A great, free day out and a great atmosphere.”

“Very laid back and casual feel. Not formal.”

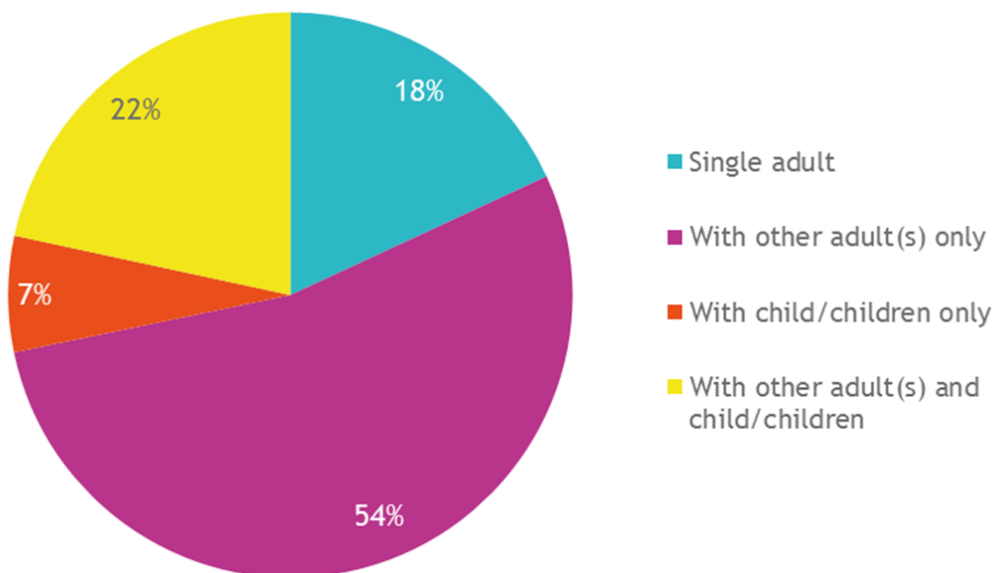
“Relaxing, quirky, theatrical”

*“There was an element of the unknown to this performance
which created quite a talking point!”*

“A brilliant day out for all of the family in a completely unthreatening environment”

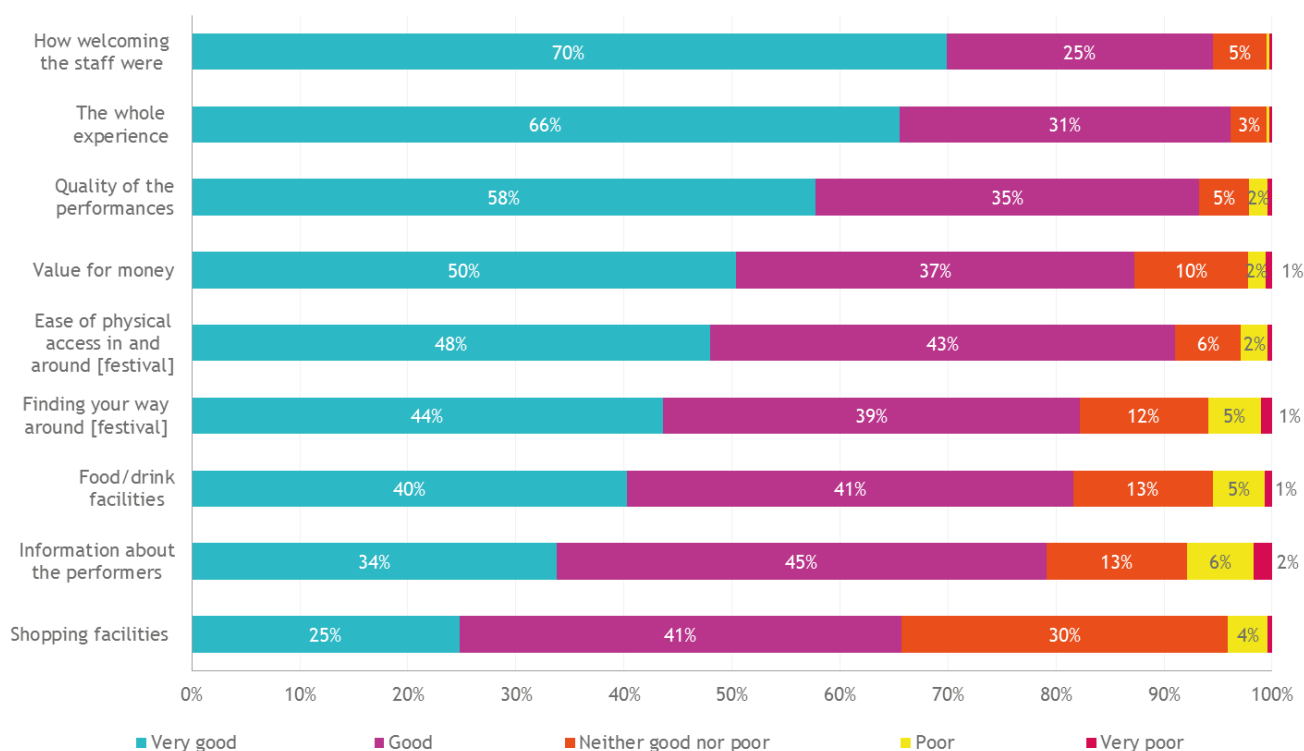
It seems that the social appeal of the experience is generated by different elements, both in terms of the people with whom people decide to attend and the importance of linking with a wider community.

Many people attend as part of adults or adults and family groups, with a comparatively high 22% of people appearing to be in multi-family groupings.



Nature of the experience

By asking people to rate different parts of their experience on a scale of very good to very poor it is possible to gain a sense of the different strengths and weaknesses of the OA experience. Here, they have been ranked top to bottom with the highest rated at the top.



Clearly, there is a high degree of satisfaction for a range of elements for the OA audience with 97% saying that the ‘whole experience’ is either very good or good, again this is borne out by some comments.

“Accessible. Open. Free. Involving. All Good.”

“It was a complete delight that had me grinning like an idiot from the time it started to several hours afterward.”

“It was fantastic to see so many different people gathered to enjoy live theatre!”

“I am always impressed by the very high standard of the various events in the Festival”

Less strong, as in Year 1, are the audience’s feelings about information, access and finding their way around the site. Information seems to have two elements to it - both practical in terms of finding out and being directed to the right place at the right time and contextual in terms of greater depth of information about the artists, performers and acts themselves. This is something which OA organisations and companies may want to consider as an area for improvement. These comments provide an indication of audience perspectives.

“Difficult to follow programme. Nothing in time order.”

“Timings - not starting at specified time”

“Easier schedule - feel missing an event if another one on”

“Limited information on artists - even description of painting/sculpture medium photography.”

“Just leafletting the message prior to performance would have increased understanding of performance”

One of the elements which many of the participating organisations did this year was to ask people for three words to describe their experience. These three words have been combined and entered into this wordle. Words that are bigger appear more often in audience responses.



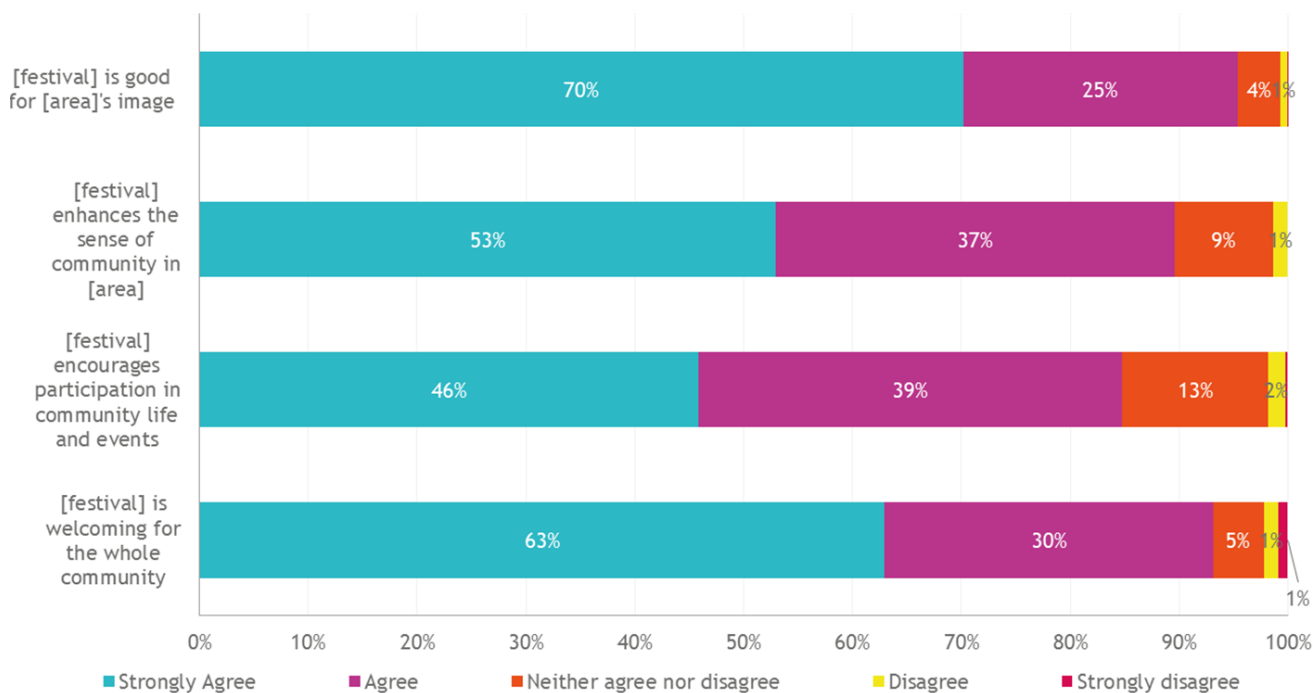
Combined, this motivational and attitudinal information gives us some clues about perceived benefits of OA experiences and suggests communication should emphasise an enjoyable social experience with an unusual exciting twist and the potential to stimulate discussion and special shared experiences.

Connections with place and community

“The events were excellent & brought the City Centre to life in an unusual, original & diverse way.”

One of the notable characteristics of OA is the way in which it appears to contribute to pride in a place and a sense of it encouraging a community feel or cohesion.

Many of the organisations asked questions in which audience members were asked how far the event contributed to a sense of place and community with the results shown in this graph.



The idea of an event being good for image is especially positive, with 70% of people strongly agreeing with this statement. Given that the majority of people in the audience appear to be relatively local, this implies that events affect a sense of ‘local pride’. It may also affect cultural tourism, with the event potentially linked to good perceptions of the area and giving people a reason to visit.

“I did not realise how much talent we have in our home town”

“Wonderfully entertaining, Good community spirit, Unique outdoor entertaining”

“Thrilled that something is actually happening here!”

“Transformation of the city. Feels like a holiday when you attend.”

If there was an element of dissatisfaction around this theme it was that in some events and for some audiences, there was a desire for more interaction or community participation in the event itself.

“more groups eg community groups using the outside area”

The simple quantitative methodology used inevitably offers a somewhat one-dimensional view of what are in fact rich and complex social experiences and is only able to point to the probable impact OA events can create (see Next Stages for further ideas on this point).

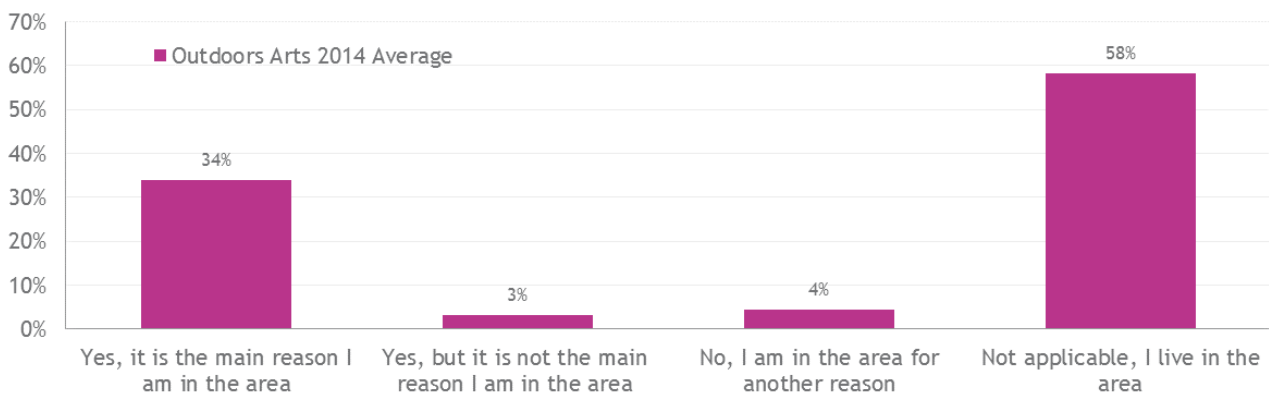
Cultural Tourism and Economic Activity

Some organisations asked further questions around cultural tourism and economic activity. Whilst these aspects were accurate and robust in their own right some care should be taken in making statements about the sector as a whole as they are based on only a few examples. However, a brief overview raises some questions.

In answer to the question ‘Do you live in the UK?’ it is clear that there is a significant minority attending who do not. There is a big difference between organisations, with London and Southern festivals tending to have a higher proportion of inbound visitors than in the Midlands and the North.

Outdoors Arts Do you live in the UK? 2014 Average	
Yes	95%
No	5%
Base	9,357

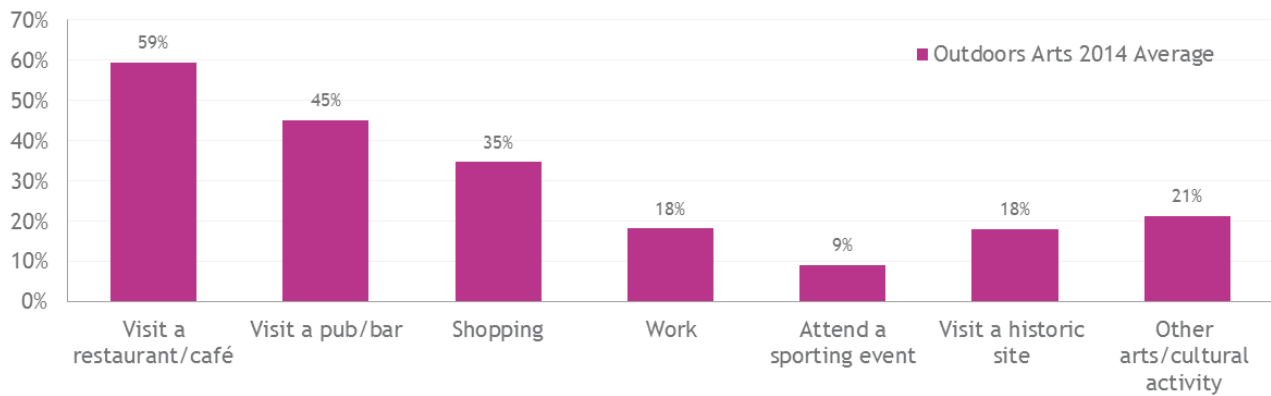
Looking more closely at the reasons people give for visiting the area offers a better idea of the cultural tourism context.



If you are visiting [area] for the day or overnight, did you plan your trip particularly to go to [event]?

Of those visiting from outside, the OA event was the main driver for their visit. This is currently a self-defining question in terms of whether people perceive themselves being from inside or outside the undefined “area”. However, postcode data suggests most ‘visitors to the area’ are in fact people coming from the surrounding ‘sub-region’ around the event location - usually on a special day trip to the event.

As part of their visit, respondents say they are also involved in a range of other activities:



Without even looking at spend, this shows positive indications of the impact on local economies. Given that the factor which had the lowest satisfaction (see quality of experience above) was shopping and local facilities, it would appear that more involved conversations with local providers has potential.

The full research findings are contained in the appendix and during 2015, as this phase of Audience Finder comes to a close, a more comprehensive overview of all three years of results will be developed.

Implications

As noted, in the introduction, the results are open to differing interpretations and readers of this report, especially those involved in the research, will have their own views. We will develop thinking through further discussion with stakeholders to draw out more developed conclusions and ideas. However, here are a few conclusions, based on the original issues identified.

1. How far does OA reach audiences other arts do not?

Findings will help the sector to make a strong case about its capacity to attract a wide-ranging and diverse public to its events. Over two years, this has come through as a consistent and demonstrable fact. Whilst it is important to celebrate and acknowledge this, we now share a desire to understand this capacity in such a way as to enable the sector to capitalize on the results. What qualities could be built upon and amplified? What can the wider arts and cultural sector learn from this? What is the potential for new partnerships and collaboration?

The factors behind this ‘success’ needs some interpretation and consideration. OA takes places in open usually public spaces. The barriers to entry are low, not just in terms of price with many events being free, but through the way the activity is presented, involving the audience and talking to them in a way that is relevant. It is often possible to attend or leave as the audience pleases, it is not confined by the conventions of other cultural institutions. The social benefits are closely attached to the experience, with the audience able to dip in and out of activities, joining as part of a group of friends and/or family.

Care should be taken in drawing some conclusions. OA does not somehow ‘magically’ produce a diverse audience as such. It draws this audience because of the professional and carefully thought through way that events are managed. Many of these events have been taking place over several years and the organisers are experienced in understanding what works or doesn’t work in these contexts.

It is worth comparing areas of practice between the OA sector and other ‘mainstream’ cultural practice. Whilst the sector has quite rightly reminded us that OA is a valid and worthy activity on its own, not to be regarded as some kind of ‘gateway’ to other culture, it is nevertheless worth considering the value of greater exchange and partnership.

2. What are the implications for audience development?

The geo-demographic profiling undertaken as part of this and other studies provides a useful basis for audience development. It means that by collecting postcodes it is possible to gain a

rich and developed idea of the audience. So it is not just useful to know that OA attracts publics that other sectors rarely do but also to be aware of what it is those different sections of the public want, to deliver this for them and to take them on their own journey through the arts.

There are other implications which lead naturally from the findings from this year which corroborate those for 2013:

- It is important to pay attention to the 'total experience' - food, drink, social space and community are all important to the OA attender. A better understanding of artists' work may also form part of this experience perhaps as part of the 'after-experience'.
- There is a clear desire for more information about the performances, acts and artists. OA attenders are sometimes taking in a total outdoor experience moving from one event to another. They are enjoying and engaging with these activities but would like to know more about them. Why are they there? What are the performers trying to do? How does it fit in to the event themes? This is not necessarily about signage but about enabling explorations, perhaps through online and social media.
- Families and larger groups need better navigation of the programme and space: their needs are different from other attenders.
- The social nature of the OA experience lends itself extremely well to social media sharing. The sharing of comments, photos and films demonstrates what is valuable to the audience and draws other potential audiences in to the frame.
- Some audiences want more interaction and opportunities for co-creation. Events are inspiring people to participate themselves. Carnival and mela do this particularly well and forms part of both traditions.
- A few events in the last two years have started to explore the use of digital technology in OA, and especially as a platform for more interactive experiences. This seems to be an especially interesting area which artists and producers could consider. The OA sector has a special opportunity to connect people, artists, arts and places in this way, connecting different ideas of space.

3. What improvements would help to increase engagement and public support?

Many organisations have built on these natural conditions developing enduring local relationships, planning the total experience in creative, responsive ways and commissioning and presenting breath-taking out-of-the-everyday experiences which work uniquely well in a communal setting. Using digital online engagement can take this further, either through digital

experiences that enhance and develop understanding of an area or take people on new cultural adventures.

As noted in the results above, one of the few areas in which the audience is not totally satisfied is in the area of information provision. This is both in terms of practical details and more contextual information. It should be remembered that this is an audience that is, for the most part, not regular attenders of the arts and they might not be familiar with the conventions of attendance or used to seeking out background details of artistic work. It is a part of the experience which OA organisers could change in a relatively straightforward way.

4. What is the economic impact of OA?

Whilst it has been difficult to undertake a full analysis of sector-wide economic impact, many individual OA organisations have done so, offering indications of the collective impact. There are key questions around how these findings are taken forward. They are usually used by local authorities or by arts organisations to demonstrate impact and a return on investment but there appear to be few instances in which this is taken further in terms of forming partnerships and developing initiatives between local authorities, arts providers and businesses. The future for these partnerships should be considered.

5. What are the implications of paid-for models?

It has not been possible, using the research from the first two years, to reach solid conclusions about this question. Free provision seems to be an important part of making it diverse and accessible and it tends to be seen as being part of an area's civic provision, so in this sense it is appreciated as something which people have paid for through their local or national taxes. Paid-for models would need to be carefully considered, probably as part of proving 'extra value' as part of a wider mix. On reflection, it is not a research question which can be adequately answered with the current methodology.

6. What are the intrinsic and instrumental benefits?

The findings begin to give some indications of the benefits derived from OA. It is a social experience that happens outdoors, taking people away from their sofa or television. These outdoor public experiences are usually interpreted as positive, encouraging a sense of well-being and there seems to be appreciation of the quality nature of the arts itself which is special, surprising and encouraging different perspectives on the world. However, further research into these areas would provide a clearer idea of the nature of these benefits.

There is one clear area in which the instrumental benefits are clearer and this is in the appreciation of place. The nature of the space is crucial in OA. There are different components

to this, including the low barriers to access noted, the changeable, portable nature of the activity, and the associations communities have with the local environment.

OA are usually temporary, arriving in a place and transforming previous perceptions of an area, challenging people to think of their local community as a different space, a place in which creative work takes place and which celebrates its history and current place in the world. This has relevance for local authorities; OA connects the art, audience and place in a way that other cultural activities rarely do.

7. To what degree is the quality of the artistic experience critical to these outcomes?

Some national debate has centred on the ‘quality of the experience’ and especially the nature of the audience appreciation of the performances. This has followed on from some of the results outlined above as, because OA is attracting a large and diverse audience there is a positive desire for them to see the best possible work. This is a good and positive point as the sector needs the best work with funding dedicated to providing wonderful and inspiring experiences. It should be noted though that the research does not show current dissatisfaction with the work; the audience says it appreciates the quality of the work with an interesting factor being the way in which audiences talk about surprise and the exceeding of expectations.

However, this is a quantitative big data project and by its nature there are things it can’t answer. An interesting and useful area of further research can look at the nature of this engagement, investigating the intrinsic and other impacts on audiences.

Next Stages

The Audience Finder research has given us a clear sense of who engages with outdoor arts and why, but is limited in being able to articulate what has changed. We now want to be able to explain the impact of engagement on individuals, communities and society.

These are some suggested areas for further research, looking at benefits and impacts such as these:

- *Cultural*: both concurrent and experienced impacts and the benefits to the individual
- *Economy*: comparing economic and social ROI as part of a case for investment, as well as perceptions of the role of outdoor arts in regeneration and place-making
- *Wellbeing*: the contribution outdoor arts makes to positive perceptions of quality of life, sense of belonging and identity, for different population groups
- *Society*: with a particular emphasis on community cohesion and empowerment, and pride in place.

There are also a variety of academic studies into the OA and related research in the UK and internationally and we hope to start bringing this data together to fill gaps in our knowledge and help evolve practice.

In order to achieve this, different and complementary methodologies will be required and this is an area that ISAN and The Audience Agency is currently investigating.



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ENGLAND**

Appendices

1. Organisations participating in the research
2. Full Results
3. Audience Spectrum
4. Audience Finder Outdoor Arts in 2015

1. Participating Organisations

The organisations that are part of the 2014 Year 2 research includes:

Africa Oye

Ageas Salisbury Festival

Appetite

artsdepot

Bath Fringe Festival

Bradford Festival

b-side Festival

Derby Feste

Dorchester Festival

Festive Road

Freedom Festival

Fuse Medway Festival

Greenwich + Docklands International Festival

Hatfair

Kendal Mintfest

LeftCoast

Norfolk & Norwich Festival

SeaChange Arts

Stockton International Riverside Festival

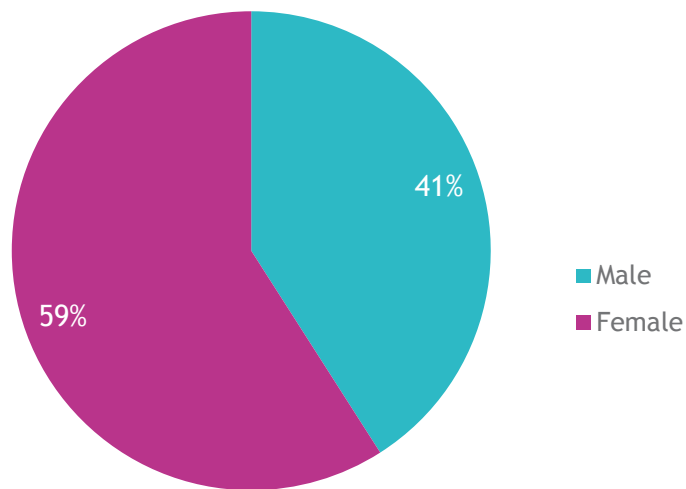
The Regent Street Association

Totally Thames

2. Results

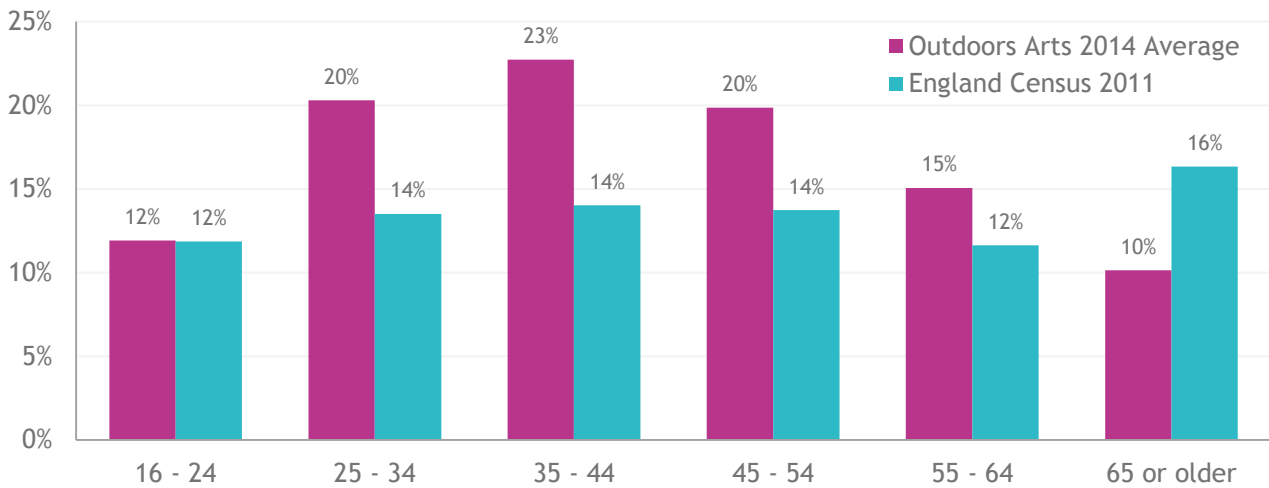
Gender

Sex	Outdoors Arts 2014 Average	Lowest	Highest	England Census 2011	Outdoor Arts 2013 Average
Male	41%	21%	62%	49%	38%
Female	59%	38%	79%	51%	62%
<i>Base</i>	7,139			53,012,498	7,052



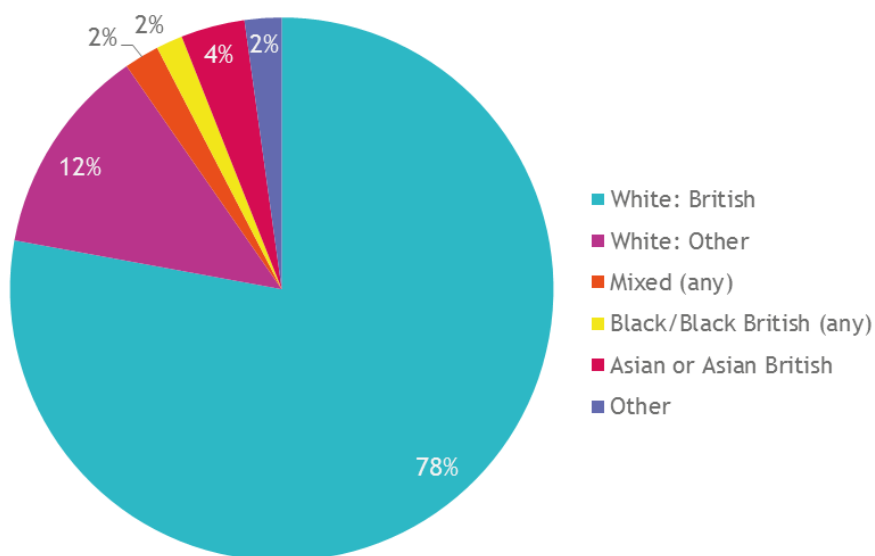
Age

Age (short)	Outdoors Arts 2014 Average	Lowest	Highest	England Census 2011	Outdoor Arts 2013 Average
16 - 24	12%	4%	21%	12%	15%
25 - 34	20%	8%	34%	14%	21%
35 - 44	23%	14%	34%	14%	23%
45 - 54	20%	11%	30%	14%	21%
55 - 64	15%	7%	24%	12%	13%
65 or older	10%	0%	23%	16%	6%
<i>Base</i>	7,850			53,012,498	4,836



Ethnicity

Ethnic group (short)	Outdoors Arts 2014 Average	Lowest	Highest	England Census 2011	Outdoor Arts 2013 Average
White: British	78%	34%	98%		70%
White: Other	12%	0%	41%		10%
Mixed (any)	2%	0%	13%		3%
Black/Black British (any)	2%	0%	5%		4%
Asian or Asian British	4%	0%	15%		10%
Other	2%	0%	6%		3%
<i>Base</i>	6,603				5,066



Disability

Limiting disability	Outdoors Arts 2014 Average	Lowest	Highest	England Census 2011	Outdoor Arts 2013 Average
Yes, limited a lot	3%	0%	8%	8%	2%
Yes, limited a little	6%	1%	12%	9%	6%
No	91%	80%	98%	82%	92%
<i>Base</i>	<i>6,460</i>			<i>53,012,498</i>	<i>4,790</i>

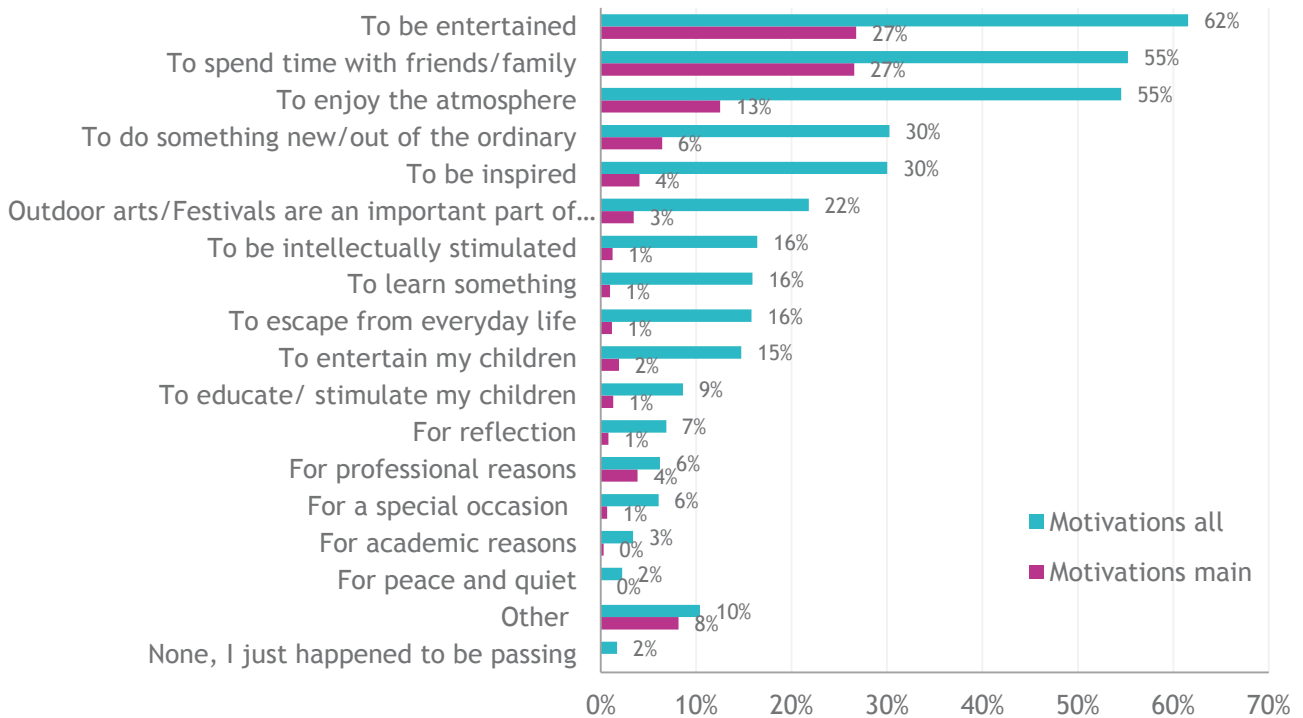
Previous Attendance

Have you visited [Festival] before this year?	Outdoors Arts 2014 Average	Lowest	Highest	Outdoor Arts 2013 Average
Yes	61%	20%	86%	65%
No	39%	14%	80%	35%
<i>Base</i>	<i>4,310</i>			<i>3,449</i>

Have you visited [Festival] before this year?	Outdoors Arts 2014 Average	Lowest	Highest
Yes, last year	49%	29%	73%
Yes, two years ago	9%	5%	13%
Yes, three years ago	3%	0%	6%
Yes, between four and five years ago	3%	0%	9%
Yes, more than five years ago	2%	0%	7%
No, this is my first visit	35%	14%	57%
<i>Base</i>	<i>2,552</i>		

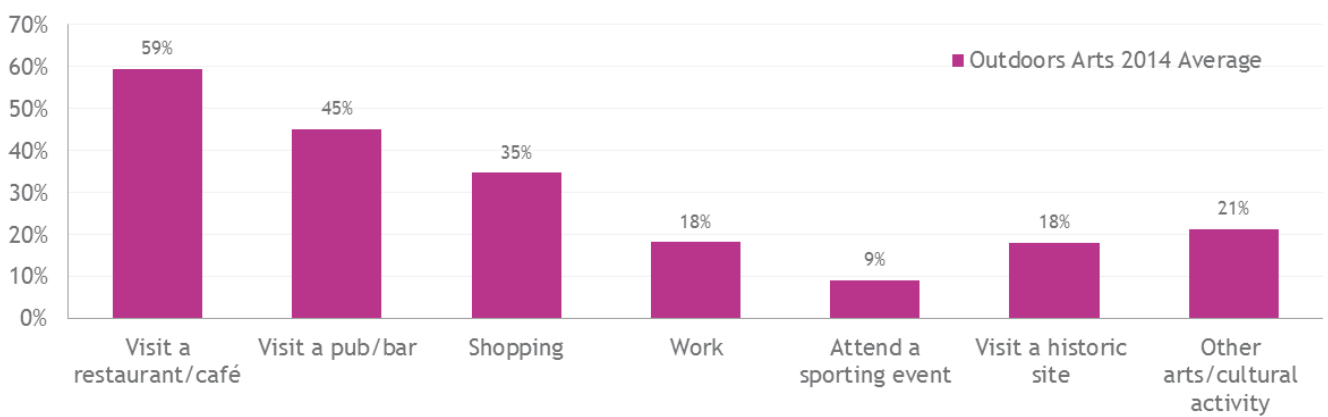
Motivations

Which of the following describe your reasons for attending?	Motivations all	Motivations main
To be entertained	62%	27%
To spend time with friends/family	55%	27%
To enjoy the atmosphere	55%	13%
To do something new/out of the ordinary	30%	6%
To be inspired	30%	4%
Outdoor arts/Festivals are an important part of who I am	22%	3%
To be intellectually stimulated	16%	1%
To learn something	16%	1%
To escape from everyday life	16%	1%
To entertain my children	15%	2%
To educate/ stimulate my children	9%	1%
For reflection	7%	1%
For professional reasons	6%	4%
For a special occasion	6%	1%
For academic reasons	3%	0%
For peace and quiet	2%	0%
Other	10%	8%
None, I just happened to be passing	2%	-
<i>Base</i>	907	466

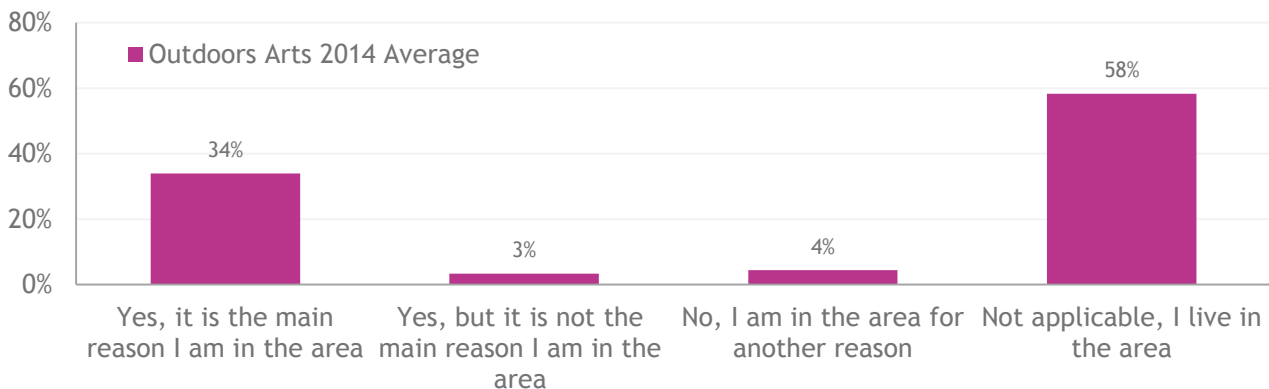


Other cultural activity

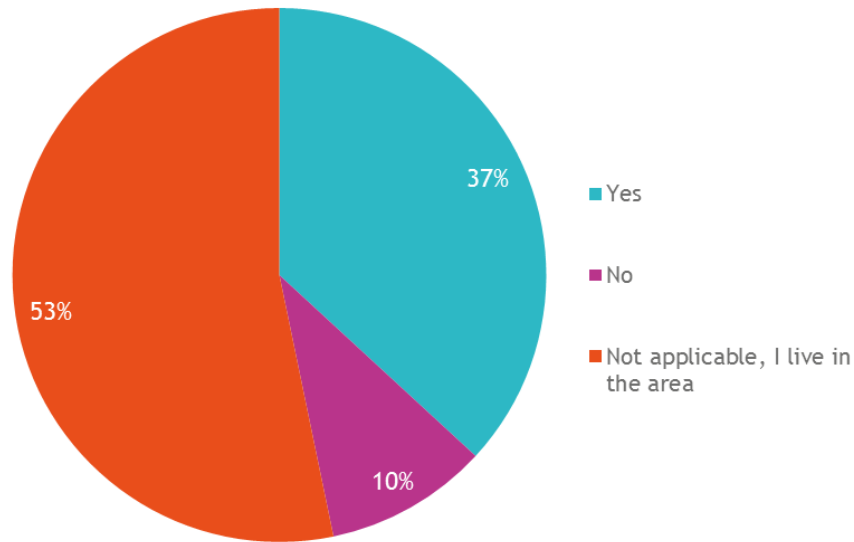
What else have you done/intend to do in [area] whilst on your visit to [Festival]?	Outdoors Arts 2014 Average	Lowest	Highest
Visit a restaurant/café	59%	53%	65%
Visit a pub/bar	45%	28%	68%
Shopping	35%	22%	62%
Work	18%	12%	37%
Attend a sporting event	9%	4%	21%
Visit a historic site	18%	8%	29%
Other arts/cultural activity	21%	6%	32%
<i>Base</i>	668		



If you are visiting [area] for the day or overnight, did you plan your trip particularly to go to [Festival]?	Outdoors Arts 2014 Average	Lowest	Highest
Yes, it is the main reason I am in the area	34%	10%	60%
Yes, but it is not the main reason I am in the area	3%	0%	6%
No, I am in the area for another reason	4%	1%	8%
Not applicable, I live in the area	58%	25%	85%
<i>Base</i>	1,269		

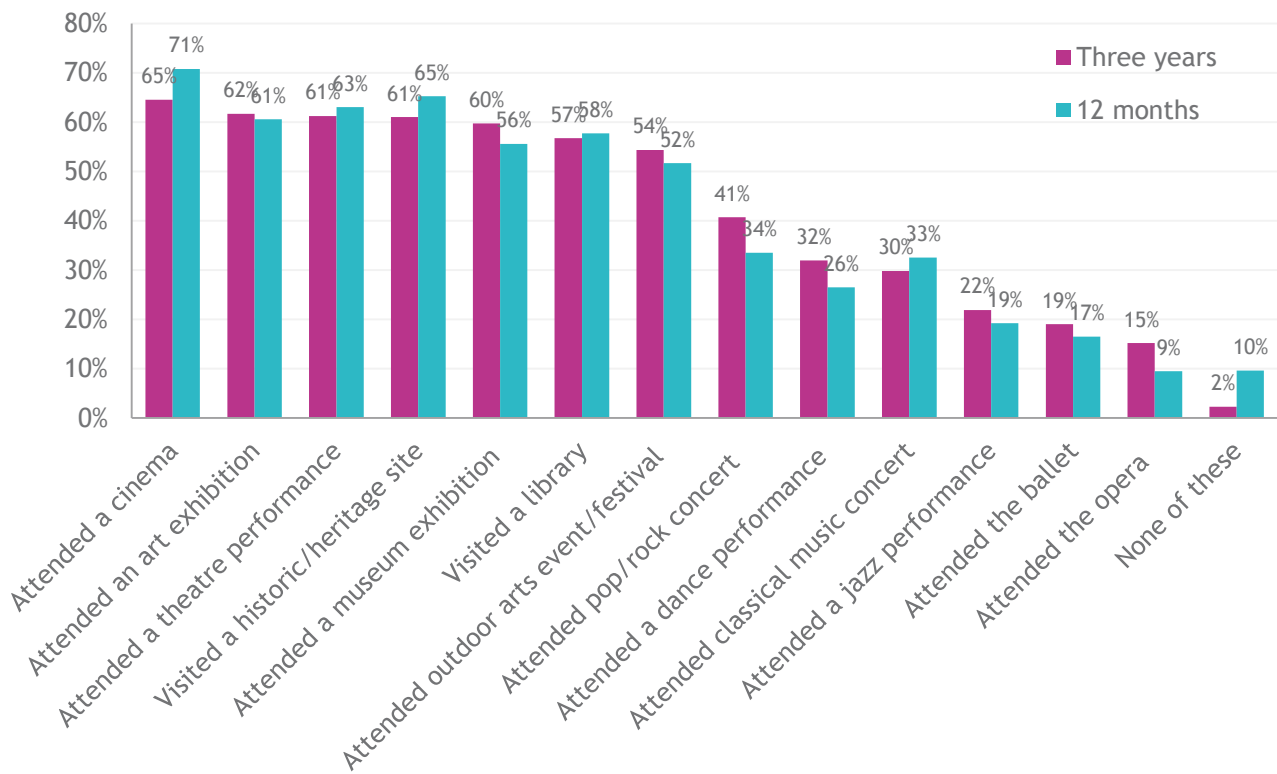


If you visited [area] for the day or overnight, did you stay overnight?	Outdoors Arts 2014 Average	Lowest	Highest
Yes	37%	9%	88%
No	10%	1%	27%
Not applicable, I live in the area	53%	5%	85%
<i>Base</i>	2,609		



Attendance at other cultural events

Which of the following have you visited within the last...?	Three years	12 months
Attended a cinema	65%	71%
Attended an art exhibition	62%	61%
Attended a theatre performance	61%	63%
Visited a historic/heritage site	61%	65%
Attended a museum exhibition	60%	56%
Visited a library	57%	58%
Attended outdoor arts event/festival	54%	52%
Attended pop/rock concert	41%	34%
Attended a dance performance	32%	26%
Attended classical music concert	30%	33%
Attended a jazz performance	22%	19%
Attended the ballet	19%	17%
Attended the opera	15%	9%
None of these	2%	10%
<i>Base</i>	1,002	673



Community Impacts

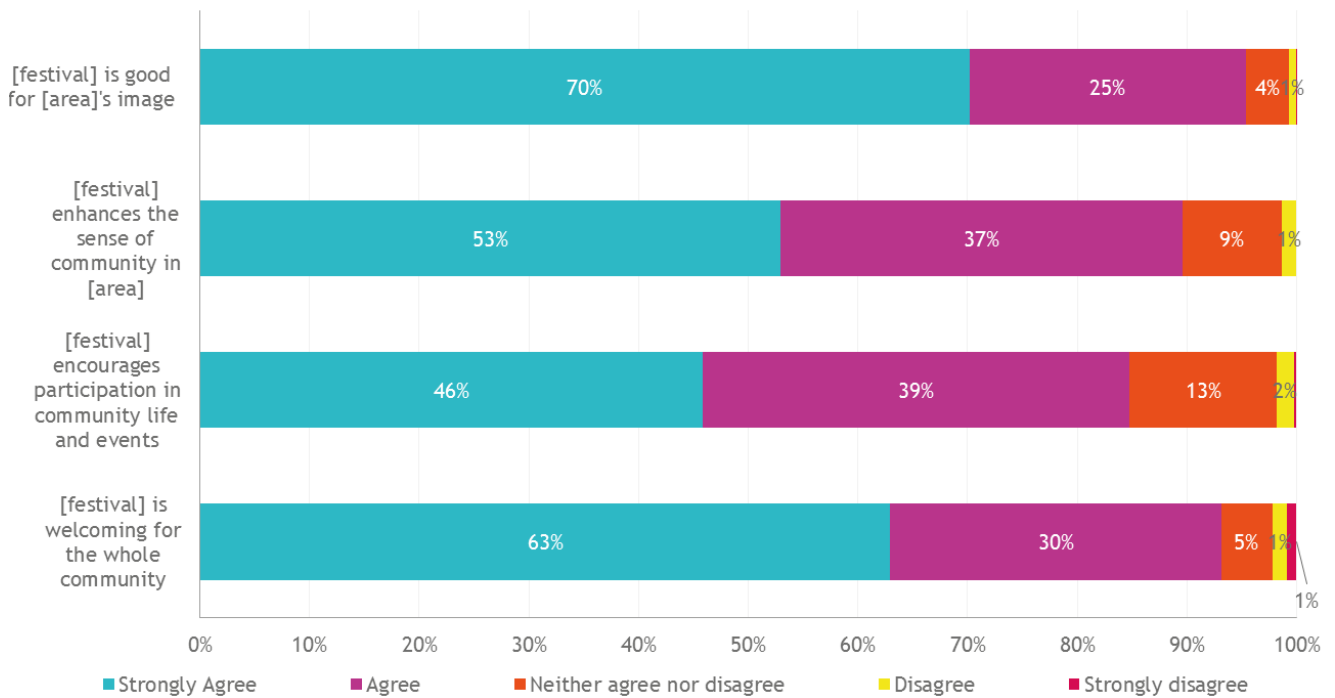
How far do you agree with the following statements?

[Festival] is welcoming for the whole community	Outdoors Arts 2014 Average	Lowest	Highest
Strongly Agree	63%	41%	93%
Agree	30%	6%	48%
Neither agree nor disagree	5%	1%	13%
Disagree	1%	0%	8%
Strongly disagree	1%	0%	3%
Base	993		

[Festival] encourages participation in community life and events	Outdoors Arts 2014 Average	Lowest	Highest
Strongly Agree	46%	24%	75%
Agree	39%	18%	59%
Neither agree nor disagree	13%	7%	18%
Disagree	2%	0%	5%
Strongly disagree	0%	0%	1%
Base	646		

<i>[Festival]</i> enhances the sense of community in <i>[area]</i>	Outdoors Arts 2014 Average	Lowest	Highest
Strongly Agree	53%	31%	81%
Agree	37%	16%	48%
Neither agree nor disagree	9%	2%	17%
Disagree	1%	0%	3%
Strongly disagree	0%	0%	0%
<i>Base</i>	442		

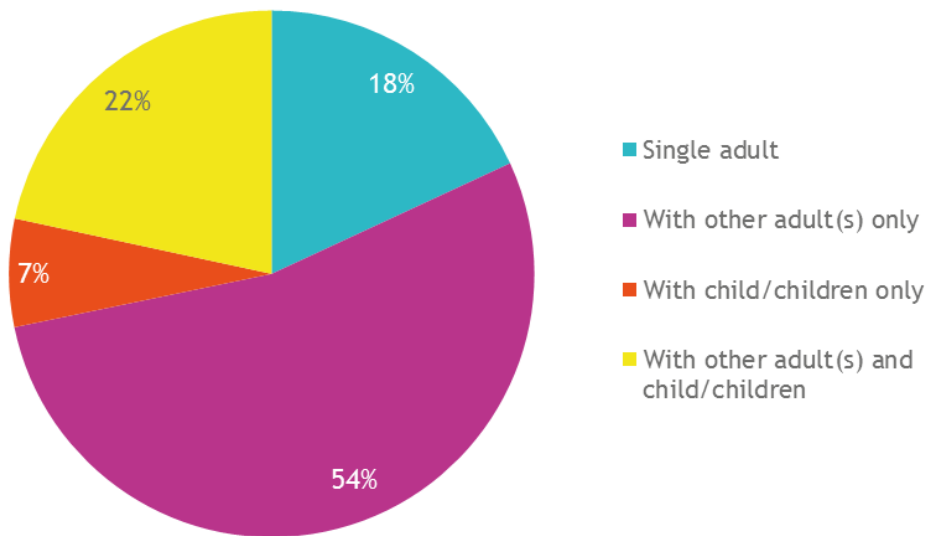
<i>[Festival]</i> is good for <i>[area]</i> 's image	Outdoors Arts 2014 Average	Lowest	Highest
Strongly Agree	70%	45%	94%
Agree	25%	5%	48%
Neither agree nor disagree	4%	1%	7%
Disagree	1%	0%	2%
Strongly disagree	0%	0%	0%
<i>Base</i>	870		



Group visit

Are you visiting with other people?	Outdoors Arts 2014 Average	Lowest	Highest
Yes	82%	68%	97%
No	18%	3%	32%
<i>Base</i>	2,410		

Group type	Outdoors Arts 2014 Average	Lowest	Highest
Single adult	18%	3%	32%
With other adult(s) only	54%	31%	67%
With child/children only	7%	1%	17%
With other adult(s) and child/children	22%	7%	45%
<i>Base</i>	2,375		



Information sources

Which of the following had you seen or heard before your visit?	Outdoors Arts 2014 Average	Lowest	Highest
[Festival] leaflet/brochure/other print picked up	42%	7%	74%
[Festival] leaflet/brochure/other print posted to me	11%	0%	31%
[Festival] poster/outdoor advertising	26%	3%	39%
[Festival] website/blog	27%	0%	66%
[Festival] mobile app	3%	0%	13%
[Festival] email	18%	0%	48%
[Festival] Facebook	16%	0%	44%
[Festival] Twitter	7%	0%	32%
Other [Festival] social media	3%	0%	10%
Other website/blog	9%	2%	23%
Other mobile app	1%	0%	3%
Email from another organisation	3%	0%	7%
Newspaper/magazine	18%	4%	24%
Radio/television feature/review	5%	0%	23%
From another person or organisation on Twitter	2%	0%	7%
From another person or organisation on Facebook	1%	0%	13%
Other social media	2%	0%	9%
Word of mouth	35%	17%	53%
Other	8%	1%	28%
None of these	4%	0%	17%
<i>Base</i>	<i>1,344</i>		

Types of information sources aware of - grouped:	Outdoors Arts 2014 Average	Lowest	Highest
Physical	58%	20%	89%
Digital	47%	13%	89%
Other: word of mouth	31%	0%	53%
Other	15%	0%	39%
None	5%	0%	24%
<i>Base</i>	<i>2,603</i>		

And which of these gave you the strongest encouragement to visit?	Outdoors Arts 2014 Average	Lowest	Highest
[Festival] leaflet/brochure/other print picked up	21%	0%	43%
[Festival] leaflet/brochure/other print posted to me	7%	0%	18%
[Festival] poster/outdoor advertising	1%	0%	3%
[Festival] website/blog	10%	7%	16%
[Festival] mobile app	0%	0%	0%
[Festival] email	3%	0%	9%
[Festival] Facebook	8%	1%	14%
[Festival] Twitter	0%	0%	1%
Other [Festival] social media	1%	0%	3%
Other website/blog	5%	0%	14%
Other mobile app	0%	0%	0%
Email from another organisation	1%	0%	3%
Newspaper/magazine	11%	1%	17%
Radio/television feature/review	4%	0%	10%
From another person or organisation on Twitter	0%	0%	0%
From another person or organisation on Facebook	1%	0%	3%
Other social media	0%	0%	0%
Word of mouth	22%	9%	45%
Other	4%	0%	7%
None of these	0%	0%	0%
<i>Base</i>	432		

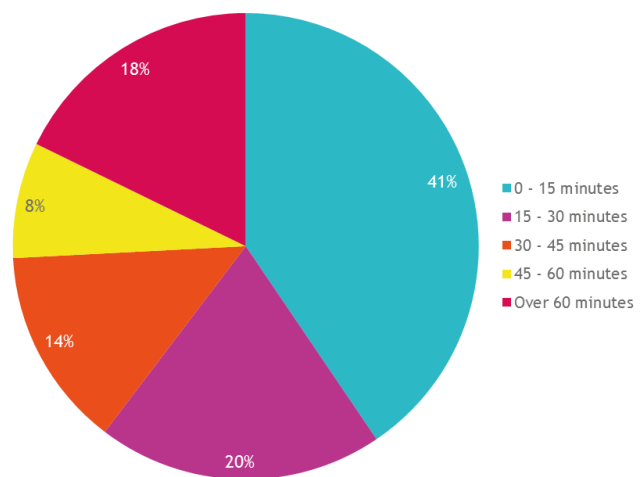
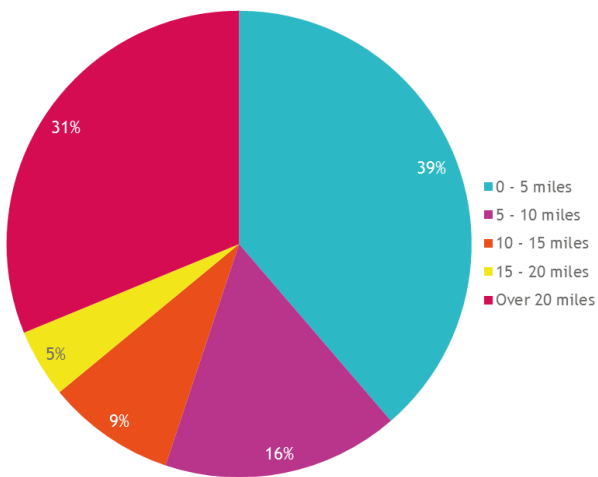
Information sources: Strongest encouragement - grouped	Outdoors Arts 2014 Average	Lowest	Highest
Physical	34%	8%	62%
Digital	30%	21%	39%
Other: word of mouth	20%	9%	45%
Other	10%	1%	17%
None	6%	0%	28%
<i>Base</i>	772		

Geography

Do you live in the UK?	Outdoors Arts 2014 Average	Lowest	Highest
Yes	95%	75%	100%
No	5%	0%	25%
<i>Base</i>	<i>9,357</i>		

Drive distance	Outdoors Arts 2014 Average
0 - 5 miles	39%
5 - 10 miles	16%
10 - 15 miles	9%
15 - 20 miles	5%
Over 20 miles	31%
<i>Base</i>	<i>6,841</i>

Drive time	Outdoors Arts 2014 Average
0 - 15 minutes	41%
15 - 30 minutes	20%
30 - 45 minutes	14%
45 - 60 minutes	8%
Over 60 minutes	18%
<i>Base</i>	<i>6,841</i>



Experience Ratings

How welcoming the staff were	Outdoors Arts 2014 Average	Lowest	Highest
Very good	70%	52%	88%
Good	25%	11%	38%
Neither good nor poor	5%	0%	9%
Poor	0%	0%	1%
Very poor	0%	0%	1%
<i>Base</i>	2,128		

Finding your way around [Festival]	Outdoors Arts 2014 Average	Lowest	Highest
Very good	44%	29%	69%
Good	39%	23%	48%
Neither good nor poor	12%	5%	21%
Poor	5%	1%	8%
Very poor	1%	0%	5%
<i>Base</i>	2,090		

Ease of physical access in and around [Festival]	Outdoors Arts 2014 Average	Lowest	Highest
Very good	48%	24%	74%
Good	43%	26%	56%
Neither good nor poor	6%	0%	14%
Poor	2%	0%	6%
Very poor	0%	0%	1%
<i>Base</i>	870		

Quality of the performances/event	Outdoors Arts 2014 Average	Lowest	Highest
Very good	58%	38%	80%
Good	35%	20%	44%
Neither good nor poor	5%	0%	10%
Poor	2%	0%	8%
Very poor	0%	0%	2%
<i>Base</i>	2,075		

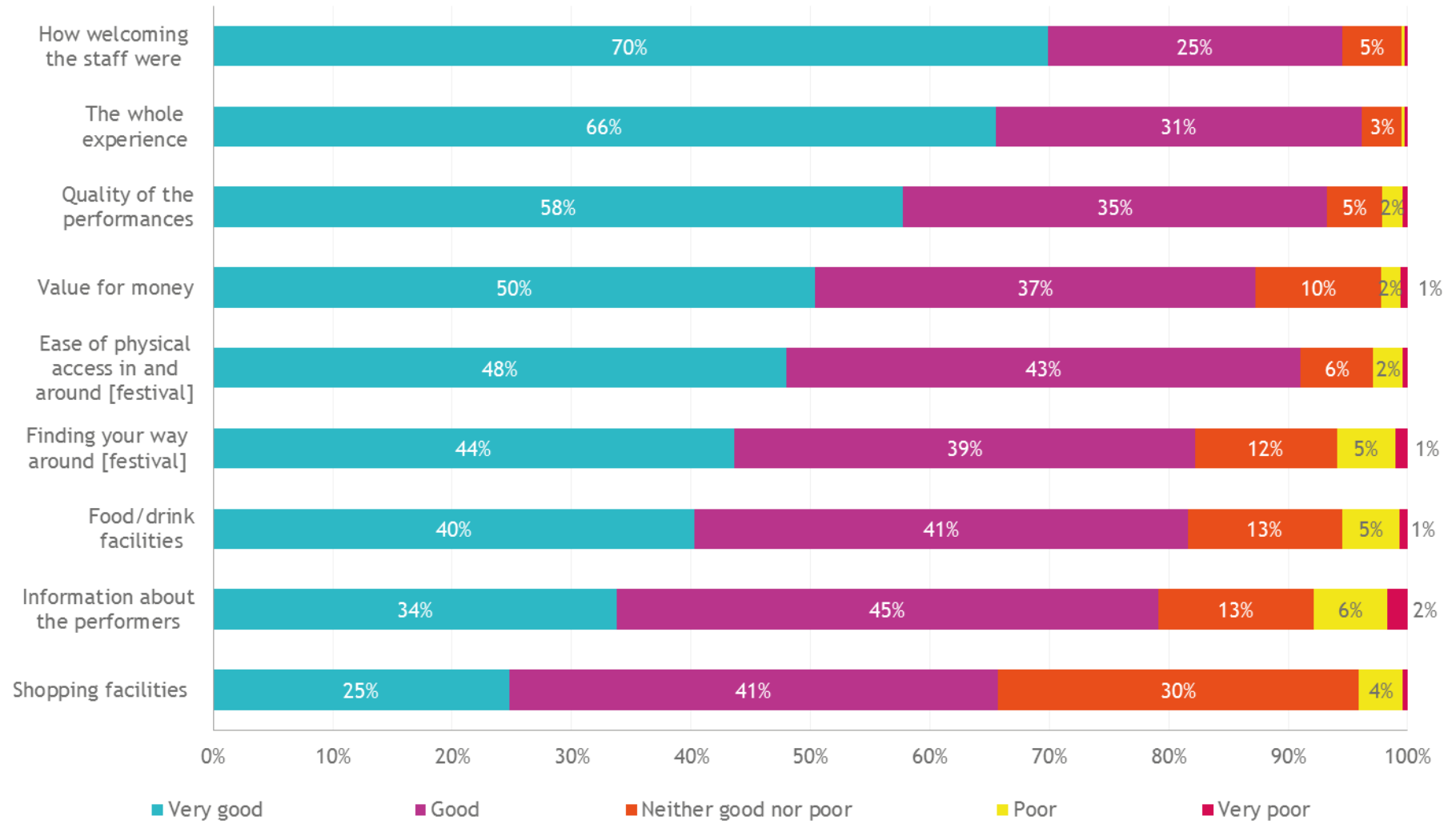
Information about the performers/event	Outdoors Arts 2014 Average	Lowest	Highest
Very good	34%	26%	56%
Good	45%	36%	54%
Neither good nor poor	13%	2%	21%
Poor	6%	2%	12%
Very poor	2%	0%	5%
<i>Base</i>	<i>1,317</i>		

Value for money of entry ticket	Outdoors Arts 2014 Average	Lowest	Highest
Very good	50%	42%	64%
Good	37%	26%	43%
Neither good nor poor	10%	9%	11%
Poor	2%	0%	5%
Very poor	1%	0%	1%
<i>Base</i>	<i>526</i>		

Food &/or drink facilities	Outdoors Arts 2014 Average	Lowest	Highest
Very good	40%	19%	53%
Good	41%	32%	49%
Neither good nor poor	13%	6%	26%
Poor	5%	1%	10%
Very poor	1%	0%	2%
<i>Base</i>	<i>681</i>		

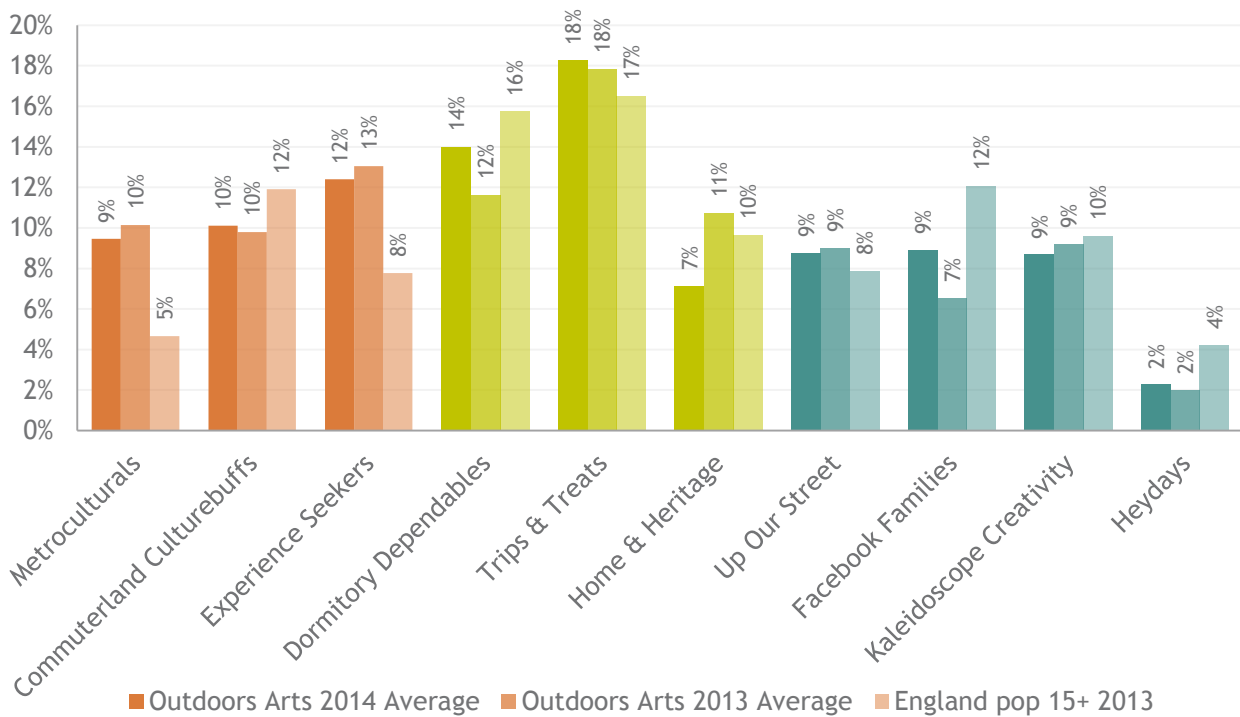
Shopping facilities	Outdoors Arts 2014 Average	Lowest	Highest
Very good	25%	11%	33%
Good	41%	27%	56%
Neither good nor poor	30%	7%	56%
Poor	4%	3%	5%
Very poor	0%	0%	1%
<i>Base</i>	<i>243</i>		

The whole experience	Outdoors Arts 2014 Average	Lowest	Highest
Very good	66%	51%	82%
Good	31%	17%	44%
Neither good nor poor	3%	0%	10%
Poor	0%	0%	3%
Very poor	0%	0%	1%
<i>Base</i>	<i>4,103</i>		



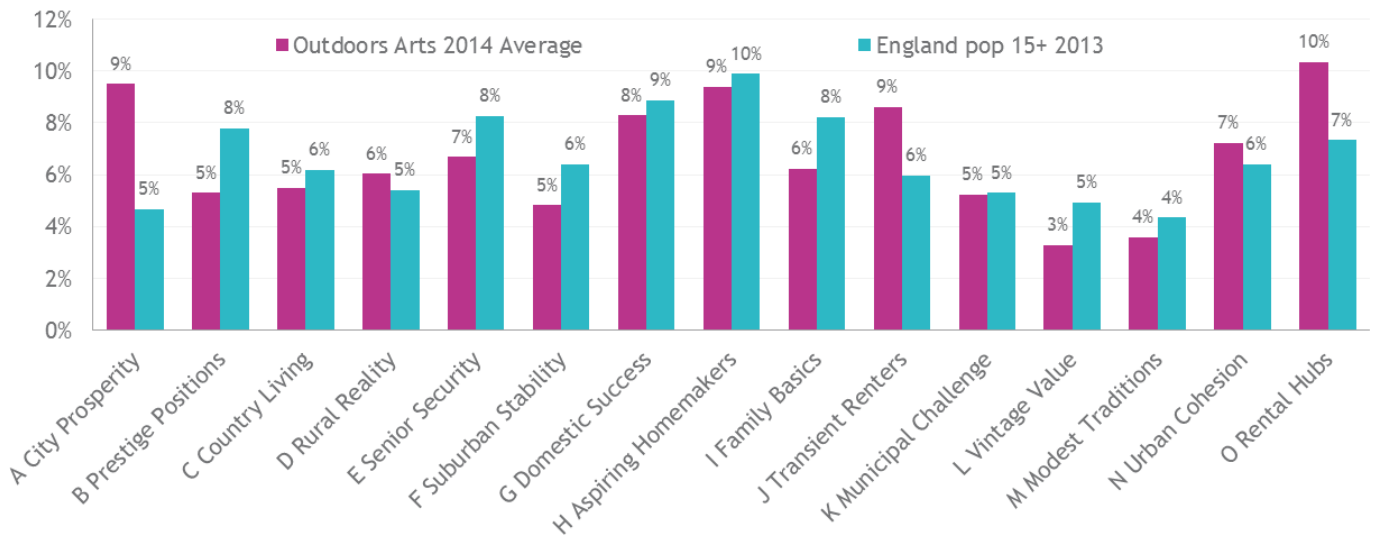
Audience Spectrum

Audience Spectrum	Outdoors Arts 2014 Average	Lowest	Highest	England pop 15+ 2013	Outdoors Arts 2013 Average
Metroculturals	9%	0%	38%	5%	10%
Commuterland Culturebuffs	10%	0%	32%	12%	10%
Experience Seekers	12%	2%	29%	8%	13%
Dormitory Dependables	14%	2%	32%	16%	12%
Trips & Treats	18%	2%	45%	17%	18%
Home & Heritage	7%	0%	14%	10%	11%
Up Our Street	9%	0%	27%	8%	9%
Facebook Families	9%	0%	27%	12%	7%
Kaleidoscope Creativity	9%	0%	29%	10%	9%
Heydays	2%	0%	9%	4%	2%
<i>Base</i>	6,660			43,812,880	3,236



Mosaic 6

Mosaic Group 6	Outdoors Arts 2014 Average	Lowest	Highest	England pop 15+ 2013
A City Prosperity	9%	0%	39%	5%
B Prestige Positions	5%	0%	12%	8%
C Country Living	5%	0%	19%	6%
D Rural Reality	6%	0%	26%	5%
E Senior Security	7%	0%	14%	8%
F Suburban Stability	5%	0%	12%	6%
G Domestic Success	8%	0%	26%	9%
H Aspiring Homemakers	9%	2%	24%	10%
I Family Basics	6%	0%	15%	8%
J Transient Renters	9%	0%	31%	6%
K Municipal Challenge	5%	0%	15%	5%
L Vintage Value	3%	0%	9%	5%
M Modest Traditions	4%	0%	11%	4%
N Urban Cohesion	7%	0%	25%	6%
O Rental Hubs	10%	2%	25%	7%
Base	6,780			44,118,717



3. Audience Spectrum

Audience Spectrum

Audience Spectrum is being developed as part of the Audience Finder programme funded by Arts Council England as part of its strategic Audience Focus fund.

The development of *Audience Spectrum* draws together some of the largest and most robust sources of information about people and how they engage with arts and culture, including:

- The Taking Part Survey - the long established DCMS survey into people's leisure, culture and sport.
- Experian - lifestyle, consumer and demographic information drawn from over 850 million input sources and 400+ variables, and including Mosaic and the online analytics tool, Hitwise.
- Proximity Indices - The Audience Agency's national overview of how well local populations are served by cultural provision.
- Audience Finder - the largest growing Big Data set in the cultural sector about audience behaviour, built on ticketing and research information.

We have used these information sources to make Audience Spectrum a tool that categorises people first and foremost on how they engage with culture in a way that is very locally applicable.

As the Audience Finder Big Data set grows, we will learn more about each of the Audience Spectrum segments, adding depth, knowledge and new ways of applying these insights to grow audiences.

4. Audience Finder Outdoor Arts in 2015

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 2015 some aspects will be 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.

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.theaudienceagency.org

Audience Finder

Audience Finder is a programme delivered by The Audience Agency with the aim of supporting cultural organisations to reach more people, new audiences and greater efficiency. It is a combined data-sharing and capacity development programme. Analysis combines customer and behavioural data fed from box office systems, online interactions and a primary research survey exploring motivations and opinions. Participating organisations access their reporting through a discrete dashboard, comparing metrics with others in collaborative “clusters” based

on geography or sector. Much information will be made available as open data. At June 2014, 550+ organisations have joined the programme; we anticipate that the programme will bring together up to 800 organisations by 2016. The box office data-sharing platform is developed by Baker Richards in partnership with Jacobson Consulting Applications Inc. of New York.

Audience Finder is an initiative commissioned by Arts Council England as part of the £3m Audience Focus strategic fund (strand 1 “Understanding Audiences”) launched in 2012. It is an ambitious ‘Big Data’ project for the arts that seeks to bring real insight and change practice.

www.audiencefinder.org

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