

July 2018

Outdoor Arts Audience Report

*What Audience Finder
says about audiences
for the Outdoor Arts*

 the audience agency

The Audience Agency
in partnership with Outdoor Arts UK

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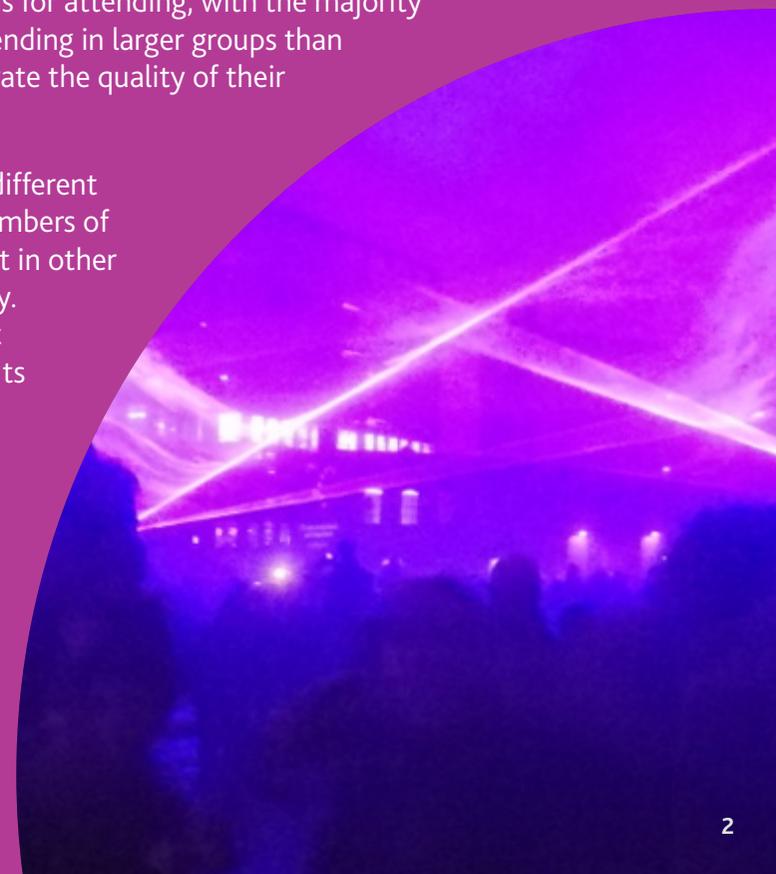
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Outdoor Arts audiences are distinctive. Unlike audiences for many other artforms and cultural activities, they tend to be representative of the demographics of the public in their area.

The data shows that audiences for Outdoor Arts are local, drawn from their immediate hinterland. Profiles vary across the country, looking very different in coastal locations, rural settings, urban areas and so on. This evidence supports the idea that Outdoor Arts has the power to amplify a sense of community, and to change people's perceptions of a place. Some of the events featured in this report have used Audience Finder to explore these impacts in more depth, with a majority of their audiences reporting an increased sense of belonging, social connection and pride in their place.

What also shines through is the value of Outdoor Arts as a celebratory and convivial experience. Social factors are important reasons for attending, with the majority of people wanting "to be entertained" and attending in larger groups than is typical across the arts. Still, though, people rate the quality of their experience itself very highly.

The Outdoor Arts events included here are of different scales, but taken together they attract high numbers of audiences, many of whom don't often take part in other state-supported or commercial cultural activity. The festivals present a rich mixture of different experiences, created in a range of ways by artists from various disciplines. Many directly involve their community as volunteers and creative participants. This range and adaptability may help to explain why Outdoor Arts is particularly effective at engaging audiences in such diverse settings.



The Big Picture

What do we know about Outdoor Arts audiences?

Collective

In some places Outdoor Arts has been proven to bring disparate parts of a community together.

Local

Outdoor Arts is predominantly local and is valued for its interaction with the community.

Social

Motivations for attending are overwhelmingly social, though entertainment value and perceptions of quality are important.

25-44

Outdoor Arts is especially attractive for the 25-44 age profile, although it draws across all age groups overall.

8/10+

The quality of experience is rated highly, with 84% of respondents recommending the event at 8/10 or higher.

Mixing artforms

There is delight at the way events combine artforms, mixing the traditional with the modern and the spectacular with the intimate.

84%

Attendees enjoy being able to engage as part of a group (84%), especially with friends, but also as adult and children groups.

Engaging all levels

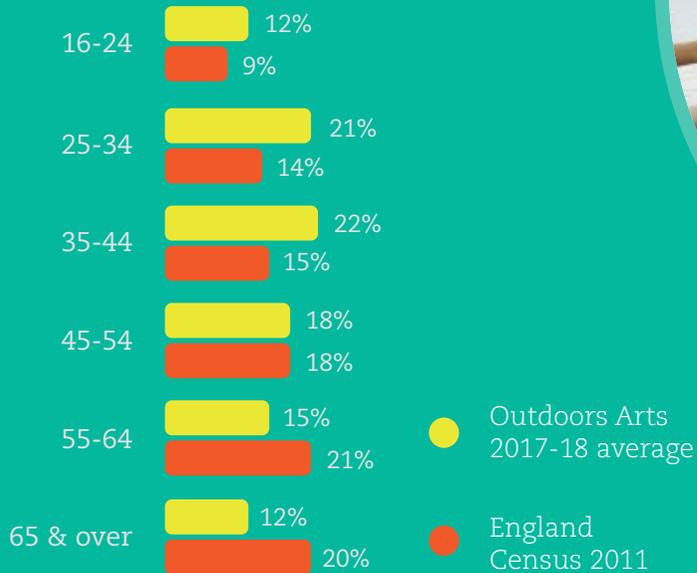
It is good at attracting people with different levels of interest, not just cultural frequent flyers.

Who are our audiences?

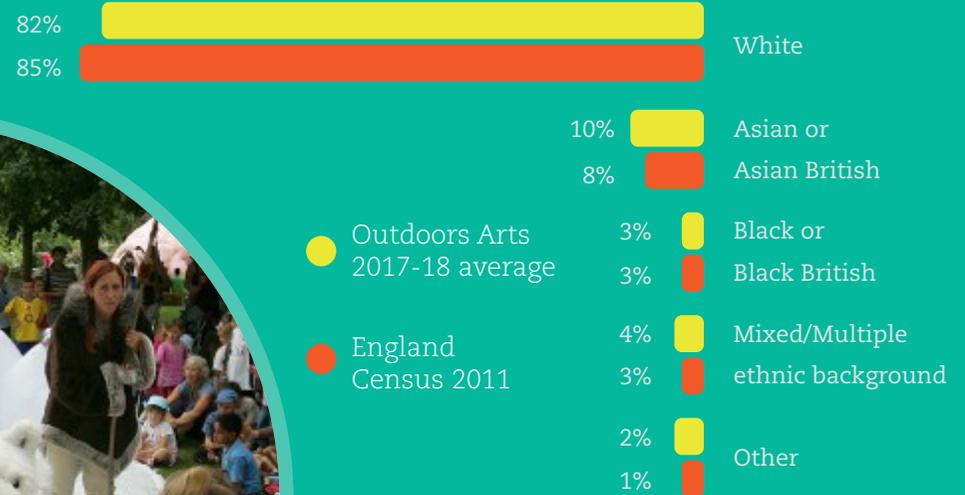
Bright young things

Age

- Outdoor Arts attracts young audiences: 25-44 year olds make up 43% of respondents at these events, but only 34% of the English population.
- Outdoor Arts audiences are dominated by younger cohorts, whereas across the cultural sector in general, attendance increases with age.



Ethnicity



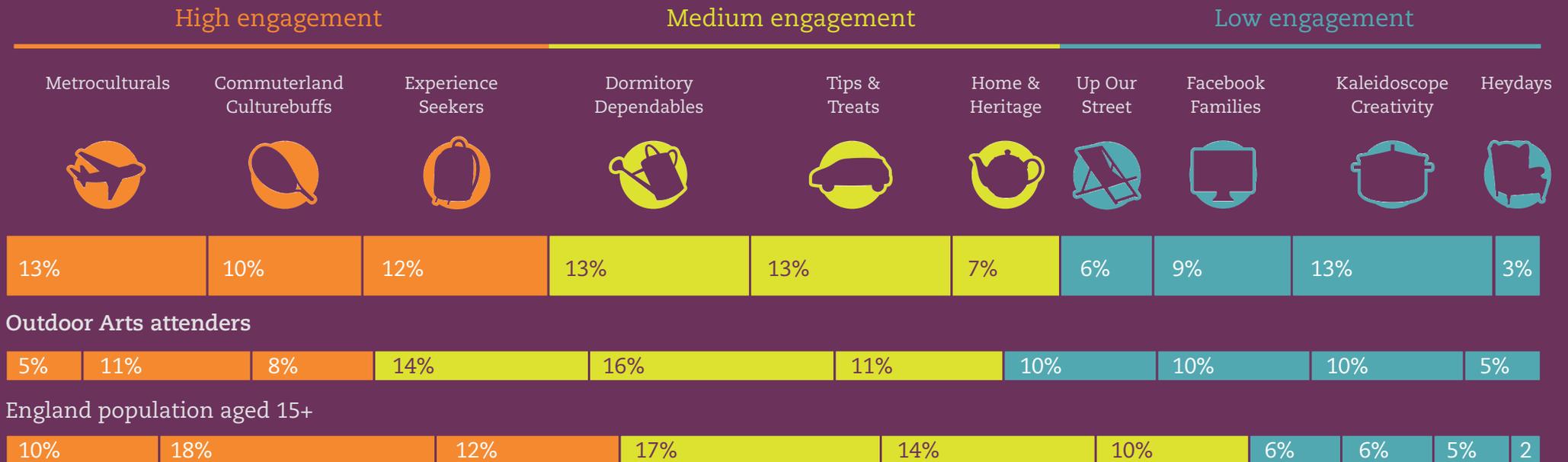
44%
16-24 year-old Outdoor Arts audiences are BAME.

- Outdoor Arts audiences are representative of the English population.
- White visitors are slightly under-indexed, while Asian groups are over-represented in the whole dataset.
- Across the cultural sector at large, the opposite is the case, with white attendees being commonly overrepresented.

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

What are they like?

Open to everyone



Cultural events attendance across all artforms



Audience Spectrum, which maps both levels of engagement with and attitudes towards the arts across the UK population, shows how distinctive Outdoor Arts audiences are.

Outdoor Arts audiences are unusually in line with the English population, attracting audiences more evenly across the Audience Spectrum than is typical for many artforms.

Outdoor Arts audiences represent a public that is not usually particularly culturally minded, achieving high attendance and responses across all High (35%), Medium (33%) and Low (32%) engagement levels. In contrast, only 17% of audiences for indoor, ticketed arts are low cultural engagers.

The strong showing from mid-engaged groups, particularly Trips and Treats and Dormitory Dependables, speaks to an audience that values the wider experience, placing emphasis on specialness and social occasion

Arts engagement levels and habits vary across regions, reflecting differences in the population and Outdoor Arts' broad appeal.

- **London** based respondents tend towards younger dominated segments, particularly **Kaleidoscope Creatives** or **Experience Seekers**.
- **Northern** respondents are more likely to belong to the **Facebook Families**, **Up Our Street** or **Tips and Treats** groups.
- **South Eastern** responses are dominated by **Commuterland Culturebuffs**.

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

Sector Story

Generation OA

Facing facts

- **25-44 year olds** is the largest age group among attenders, both actually and proportionally; this is not true of the cultural sector as a whole.
- The proportion of people attending Outdoor Arts **decreases steadily in older age groups**; in the broader sector, this trend is reversed.
- The Audience Spectrum groups that are most highly represented are those with a **younger profile**.
- The younger the audience, the more **ethnically diverse** the respondents.
- Younger cohorts are **less likely to be attending as return visitors** to the event.
- Younger audiences have slightly **lower satisfaction** levels and are **less likely to recommend** their visit to others.
- For younger groups, motivations are **overwhelmingly social**; half of respondents list this as their single greatest stimulus.

Highest
attenders

**Young
Audiences**

22-44
year olds

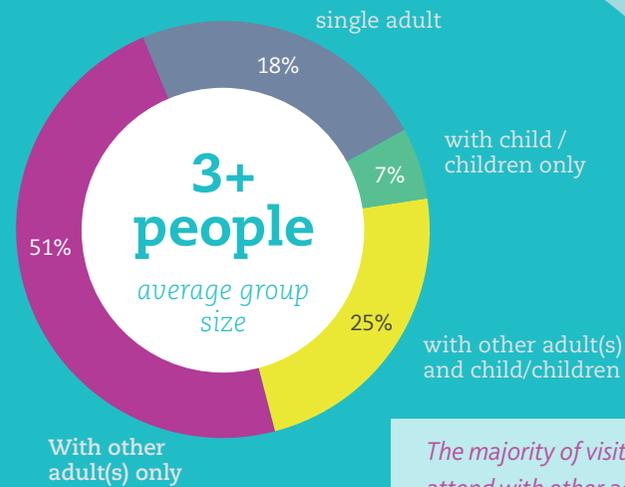
Food for thought

Looking at young audiences' behaviours and motivations more closely, 16-24 year olds are more likely (63%) to attend events in adult groups than alone (20%) or in family groups (17%).

The pattern is the same for 25 to 34 year-olds, although they edge slightly more towards a family set up (30% vs 55% as adult groups). This sector, then, can offer cultural engagement opportunities for young adults in a way that other, more formal cultural experiences do not. For many, this will be one of few cultural events they'll attend in the year.

So how do Outdoor Arts events continue to create social environments that are attractive to and engaging for younger audiences? And how do we nurture those audiences to ensure that their needs are met and they return more often?

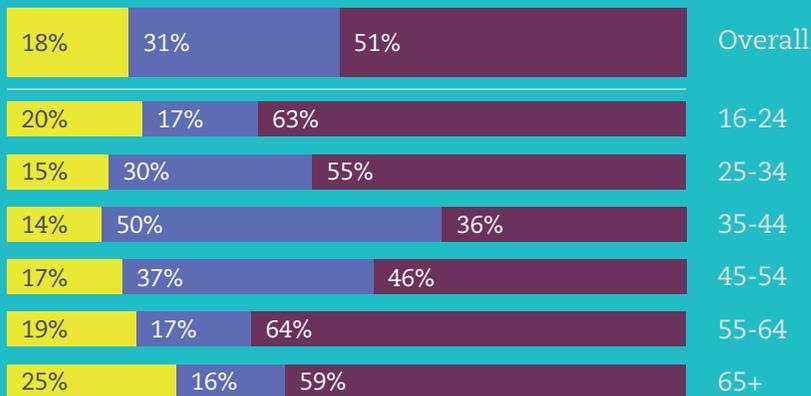
Group types



The majority of visitors attend with other adults.

76%

● Single Adults ● Families ● Adult Groups

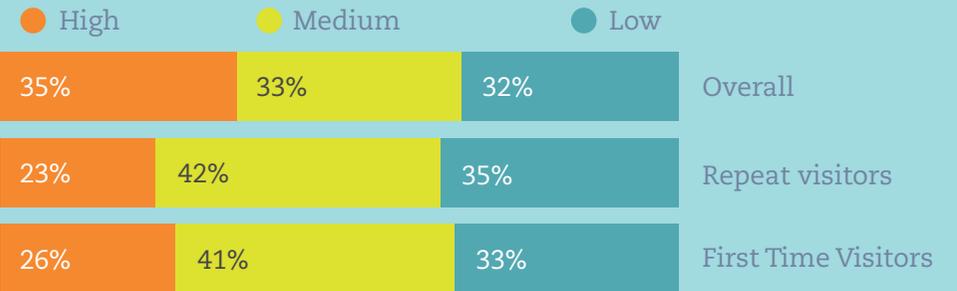


- Family groups dominate the middle age bracket of 35-44
- The youngest surveyed attenders are significantly more likely to attend in adult groups than with their families, although children who are themselves under 16 are not independently surveyed.

Who do they attend with?

All together now

Engagement level by visitor type



Visitor type by group type



Repeat visitors are more prevalent than first timers across all visitor group types

61%
Repeat visitors

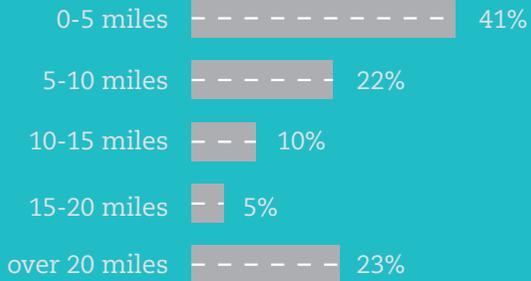
Outdoor Arts events are successfully attracting similar proportions of first-time and repeat visitors across all engagement levels and are not reliant on cultural frequent flyers for fresh blood.

“A great, free day out and a great atmosphere. It feels like a holiday when you attend.”

How do they visit?

There's no place like home

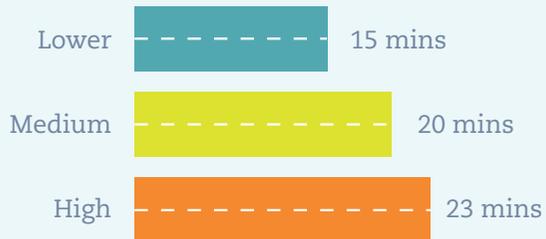
Average drive distance



% of all families surveyed attend events within a 15 minute drive of their homes:

54%

Drive time by level of engagement



Willingness to travel decreases with cultural engagement level.

Families attending events



Outdoor Arts events outside London have a stronger family focus.

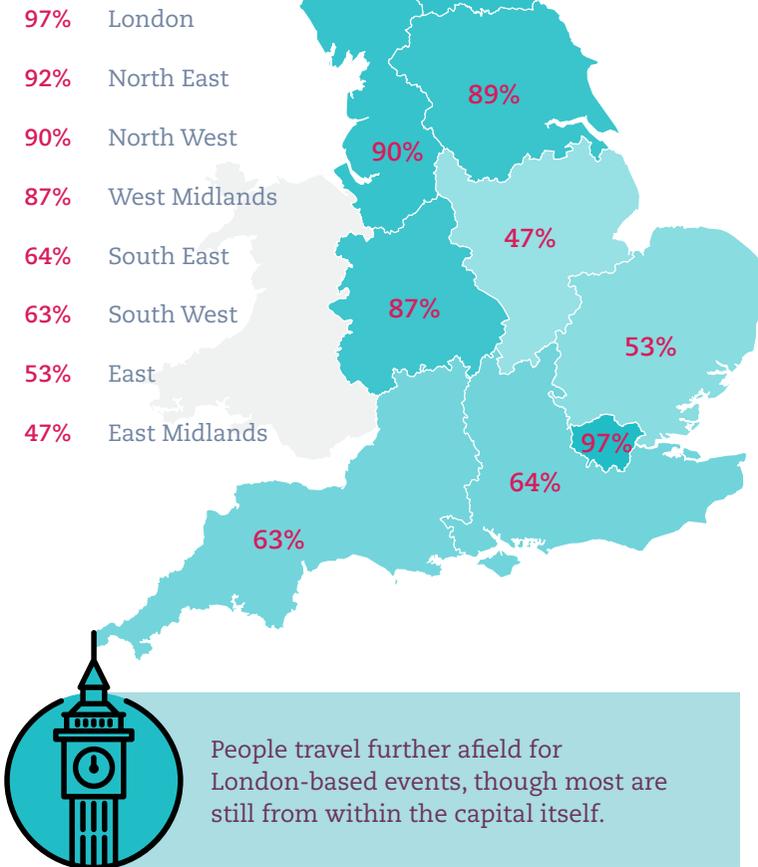
Overall, groups with children attend closest to home, while adult groups show the most flexibility in travel time.

5 Miles

People are substantially more likely to attend Outdoor Arts events within 5 miles of their homes, suggesting that the art form is perceived as a local activity.

% of visitors who are from the region in which the event is being held

Events in the northerly regions and London overwhelmingly attract local attenders.



People travel further afield for London-based events, though most are still from within the capital itself.

"I did not realise how much talent we have in our home town!"

Sector Story

Local life

Facing facts

- Visitors most frequently attend events that are under **5 miles or 15 minutes** from their homes.
- **Lower cultural engagers** are highly unlikely to attend events outside of their **local areas**.
- Whilst people usually tend towards events in their own region, this is most stark in the **North East, North West, Yorkshire and London**.
- People from **southern** and **easterly** regions (excluding London) are generally more likely to venture **further afield**.
- The younger families of the **Trips and Treats** profile are well represented at **northern events**, whereas **young adult, culturally active Experience Seekers** are more prominent in the **south**.
- Audiences **outside of London** are more likely to be from the **mid and lower engaged** profile groups.
- **Less frequent attenders rate events more highly** than those who attend regularly; London's lower satisfaction ratings reflect this divide.
- The average recommendation scores differ from region to region: lowest in **London at 51**; highest in the **West Midlands at 83**.

drive time

<5 miles

local
audience

Food for thought

This is an audience that is predominantly local but also diverse, representing contemporary society with its spread of origins and influences. Attitudes vary in nature across the country, with different characteristics evident in different places.

People in less engaged groups, despite being unusually highly represented in Outdoor Arts audiences, are extremely unlikely to attend events outside of their local areas, and the same is true of family groups.

Outdoor arts can have a significant role to play in local civic life and in enabling greater cultural democracy. This evidence supports the case for Outdoor Art's particular potential as a driver of community creativity.

Why do they come?

Fun with friends

Top 3 Specific Motivations

64%

To be entertained

53%

To enjoy the atmosphere

52%

To spend time with friends & family



Main Motivations



54%

of survey respondents aged 16 – 34 identify their main reason for attending as being primarily **Social**, though this decreases steadily with age.

Older respondents, those aged over 55, are more likely than younger cohorts to cite **Entertainment** as their main motivation and are increasingly inclined towards **Learning**.

80%

Families are 80% motivated by social and entertainment reasons.



Returning and first-time attendees express very similar motivations.



Socially Motivated

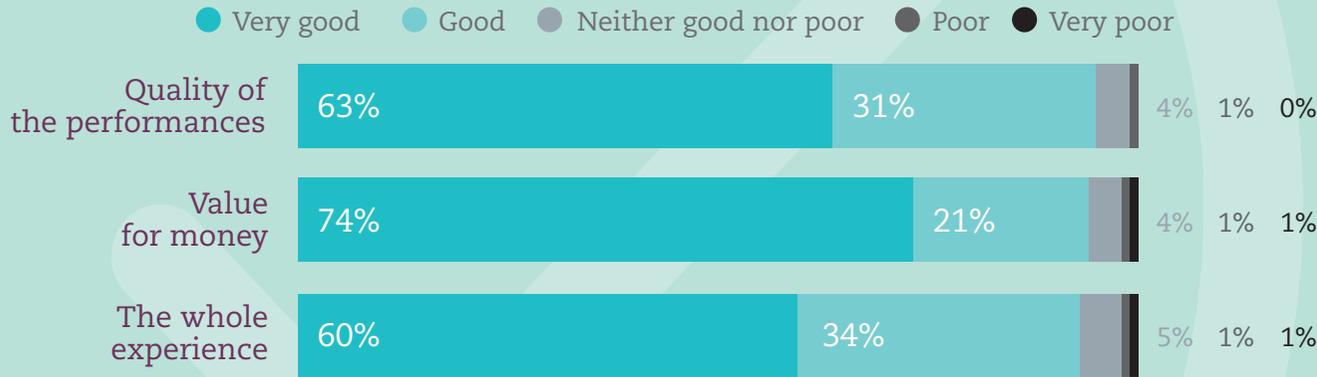
Typically, lower cultural engagers are most likely to cite Social as their main motivation. though overall motivations are similarly spread across engagement levels.

“There is an element of the unknown to this performance that created quite a talking point!”

What do they think?

Satisfied customers

Visitor experience ratings for Outdoor Arts are **extremely positive**.



Satisfaction levels vary by region:



Value for money scores especially highly

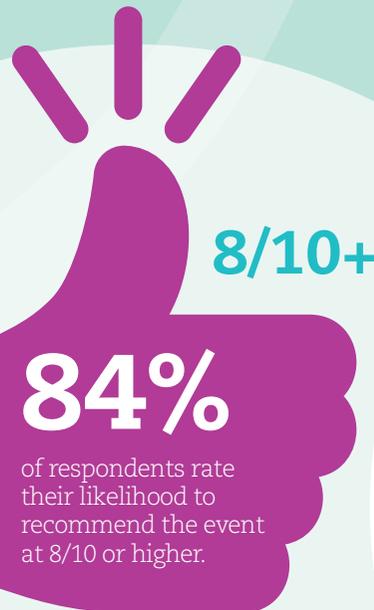
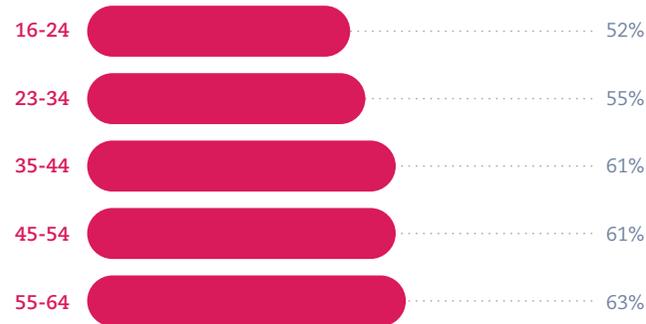
94% of visitors rate their overall experience as 'Very good' or 'Good'



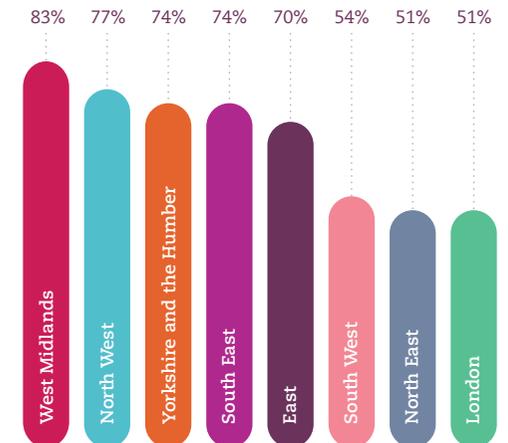
Repeat visitors express greater satisfaction with events than first timers:
Repeat visitors: **72%** First time visitors: **63%**

Satisfaction % by age

Satisfaction levels increase steadily with age.



Satisfaction % by region:



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



Sector Story

Social spaces

Facing facts

- Attenders' main motivations are **predominantly social**, followed by the desire to be entertained. Whilst this is true in other sectors, the effect is more marked in Outdoor Arts.
- Professional and academic motivations are the lowest reported.
- Outdoor Arts is thought of as engendering a **relaxed, social atmosphere**, rather than an arena for introspection.
- Reflection and relaxation, escapism and self-actualisation are among the lower scoring motivations.
- People most commonly attend Outdoor Arts events with other people, particularly in **young adult groups**.
- The atmosphere of these events attracts audiences from across the spectrum, including **typically low engaged cultural groups**.
- **Social motivation** is a key factor for **new attenders**, for those **less frequently engaged** and for **younger visitors**.
- Audiences rate the quality of performances, value for money and overall experience highly.

Food for thought

Outdoor Arts creates uniquely social creative spaces. Events rarely involve fixed seating, are often free and take place in areas of easy movement and congregation. Events may also be relatively short, sequential and connected, so movement between performances provides the opportunity to share. Motivations are more complicated than merely wanting to be with other people. Qualitative comments suggest that audiences relish the communal crowd experience as part of the enjoyment.

Background research into lower engaged groups, such as Facebook Families, shows them to be actively put off by an event described as 'arts', which affects the way they respond to the survey. The primarily social attraction for first time attenders is an important ingredient to stress in the promotion of events. There is a need to provide a hangout spot, a safe space and great facilities and amenities, all of which have potential implications for local economic activity and social cohesion.

Audiences are also enthusiastic social-sharers and there is an opportunity for Outdoor Arts to leverage content that works across social media.

What's Next?

“In working with Outdoor Arts over the past few years, we have recognised its incredible ability to reimagine spaces, bring communities together and create singular artistic experiences. This sector is ambitious and hungry to increase its impact in these respects.

To realise that potential, we need to understand the alchemy at work in the Outdoor Arts. What enables it to transform people and places? How do we have better conversations to help design experiences with and for audiences? How do we share the secrets of great engagement practice already common in the sector? It is essential that we ask our audiences and participants: “What difference has this made to you and why?” We should never assume.

Understanding the chemistry and communicating its impact will help us to advocate for the Outdoor Arts on a different level, to broaden the scope of our partnerships and to advance these transformative effects for more communities. Please keep sharing your data, stories, feedback and ideas.”

Read a fuller piece on *Attracting audiences other artforms cannot reach* by The Audience Agency's Chief consulting Officer, Penny Mills in ArtsProfessional

Context and Methodology

Audience Finder:

Audience Finder is a national audience development and data aggregation programme, enabling cultural organisations to share, compare and apply insight. It is developed and managed by The Audience Agency for and with the cultural sector and is funded by Council England as a Sector Support Organisation.

Audience Finder provides tools for collecting and analysing data in a standardised way which builds a clear picture of audiences locally and nationally. The results help organisations to find new audience opportunities using a range of tools, features and support. Including user-friendly reporting dashboards, online mapping and insight tools, and the opportunity to work in collaborative, data-sharing groups.

Audience Finder

Audience Spectrum:

Audience Spectrum segments the whole UK population by their attitudes towards culture and by what they like to see and do. There are 10 different Audience Spectrum profiles that you can use to understand who lives in your local area, what your current audiences are like, and what you could do to build new ones. Audience Spectrum is the most accurate tool the sector has ever had to help target audiences and include a wider public. Analysis and customer tagging with Audience Spectrum work at both household and postcode levels, to help cultural organisations understand audience profile and reach, enabling really accurate targeting of activity and communications.

Audience Spectrum

Background & Methodology:

Over the past six years The Audience Agency has collaborated with the outdoor arts sector using Audience Finder to better understand audiences for outdoor arts and support the sector to make the case for the impacts of its work. This work has resulted in the production of annual benchmarks, including audience data, from a significant number of outdoor festivals and events across England, alongside events and workshops to discuss the findings. The data contributing to this report was collected between 1 April 2017 - 31st March 2018 by 51 organisations/festivals in England, and drew on data from earlier years. The sample of 14,479 surveys was collected through face to face interviews or e-surveys.

Participating Organisations

Africa Oye	Global Streets Cast	Regent Street Association Motor Show	Without Walls Freedom Festival
Applause	Global Streets Creative Barking & Dagenham	Regent Street Association NFL	Without Walls Leicester City Festival
Bedlam Fair	Global Streets Home	Regent Street Summer Streets	Without Walls Leicester Diwali
Bell Square	Global Streets Luton	Stockton International	Without Walls Peterborough Key Feste
Bridgewater Quayside Festival	Global Streets Watermans	Riverside Festival	Without Walls Preston Egg Rolling
Canterbury Festival	Hat Fair	Streets of Mela	Without Walls Preston Lancashire Encounter
Coasters Dreamland Margate	Leftcoast Depart	Summer Saturdays	Without Walls Preston Street Theatre
Coasters Mouth of the Tyne	Leftcoast Lightpool	Talking Birds	Without Walls SO Festival
Coasters Seachange	Leftcoast Spareparts	Tilted	Without Walls Tour de Yorkshire
Coasters Theatre Orchard	Lumiere London	Totally Thames	
Dash Arts	Norfolk & Norwich Festival	Without Walls Bell Square	
Emergency Exit Arts	Nutkhut	Without Walls Big Feast, Appetite	
Greenwich & Docklands International Festival (and Global Streets)	Regent Street Association Christmas Lights	Without Walls Derby Feste	
Global Streets Birmingham	Regent Street Association Hamley Toy Parade	Without Walls Doncaster DNweekeND	

Contact and Copyright

The Audience Agency is funded by the Arts Council, as a Sector Support Organisation, to lead on supporting cultural organisations to gain a deeper understanding of current and potential audiences.

This report has been produced by The Audience Agency in partnership with Outdoor Arts UK.

“The work challenges and entertains; it is our most inclusive and empowering art form; it captivates communities and inspires innovation and cohesion.” Outdoor Arts UK



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**ARTS COUNCIL
ENGLAND**



More about Outdoor Arts audiences

To discover more about research into audiences for Outdoor Arts, or if you would like to contribute, contact:

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