

Getting Back Outdoors



indigo

Audience Survey

In the context of the ongoing Covid-19 pandemic, this report presents outdoor audience views on returning to live outdoor events, travelling to events, social distancing and safety measures, paying for events and experiencing culture in different formats.

September 2020

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Context

Following the UK lockdown on 23 March, and subsequent return of some pupils to school on 1 June, Indigo ran two surveys:

- **After the Interval**, from 16 April – 17 May, to help cultural organisations understand audience views on missing cultural events and returning to venues
- **After the Interval: Act 2**, from 1 June – 17 July, which addressed audience appetite for coming back to venues who could open with social distancing, and also for consuming content digitally or outdoors, where that was not possible.

This second survey demonstrated a high demand for Outdoor Arts, which merited further examination.

Getting Back Outdoors was commissioned from Indigo by OutdoorArtsUK as a free national online survey to capture audience views on returning to Outdoor Arts events post-lockdown.

The survey sought to expand on the data collected by Indigo in After the Interval: Act 2 and gather audience’s views on their desire to attend street, rural and countryside festivals, carnivals, melas and community events in the future and what some of the barriers to attendance might be.

The survey ran from 6 July - 21 August during a time which saw UK lockdown rules ease, more of the economy opening up and warmer weather encouraging people to venture outdoors again. This also coincided with the announcement on 9 July from the Culture Secretary that outdoor

performances could begin taking place from as early as 11 July as part of the government's Roadmap to Recovery.

This news saw the first steps of Outdoor Arts activity, with Bash Street Theatre being one of the first outdoor companies to present work again: 'The Strongman' took place at the Minack Theatre in Cornwall on 31 July; being a family company, they were able to rehearse in careful isolation.

There was an initial rush of events and festivals moving online - The Festival of Thrift was upcycled for the internet, Hull Freedom Festival was presented "At Home" and Murmuration Arts' social dances became a virtual series of events. But there was a variety of responsive and adaptable shows and festivals which took place live - early examples included Matt Pang's mobile 'Happy Heart Bike', The Bristol Coddymople - which brought street performance to doorsteps across Bristol and Markmark Productions socially distanced walkabout.

An app-based live performance, 'c-o-n-t-a-c-t', arrived in London from France at the end of August and Greenwich+Docklands International Festival brought Ray Lee's musical installations, Walk the Plank's 'Fire Garden', plus dance, circus and theatre performances from Mimbres, Company Chameleon, Told by an Idiot, Upswing, Humanhood and many others, to various venues across East London with a focus on local engagement.

Gobbledegook Theatre's 'Cloudscapes' continues to appear in both live and online iterations, Scoot Theatre adapted 'A Midsummer Night's Dream' to tour to cricket grounds, Brighton Open Air Theatre reopened with a comprehensive programme and The Fabularium's singing animals headed to Ulverston for their first performance of the year.

All of these artists adapted their work in some way to respond to the pandemic and worked with festivals, local authorities and producers to bring these works safely back to our streets and public spaces, with careful consideration for artists, staff, volunteers and audiences.

It is worth noting that the gathering of this data and completion of this report was written before 14 September, the date that 'The Rule of Six' came into law. At time of writing it is not yet understood how this law will affect Outdoor Arts events.

All results and reports for *After the Interval* and *Act 2* are available at:

www.indigo-ltd.com

Section 1: Methodology and Sample

Members of the OutdoorArtsUK network were invited to send an email to their audience members, mailing lists or databases, or to share the survey on their social media channels. Audiences were invited to complete the survey via a link provided.

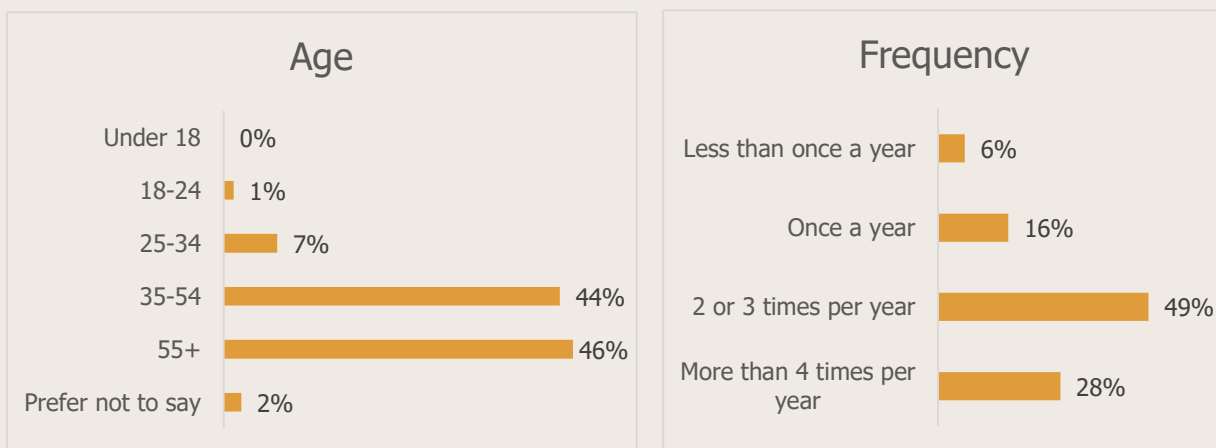
Responses were collected from 6 July – 21 August (6 weeks).

36 Outdoor Arts organisations participated in the survey and these are listed in Appendix 2. Over the 6-week period over 5,000 responses from audience members were received.

Sample breakdown

Responses: 5,273

Respondents were representative of an ENGAGED CULTURAL audience with a high frequency of attendance. These are the people we most wanted to hear from in terms of their likelihood to reattend.



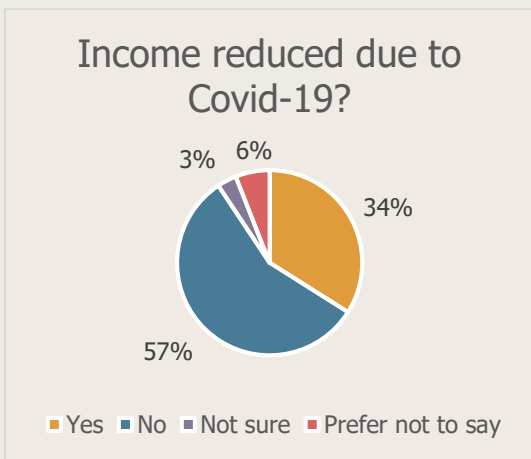
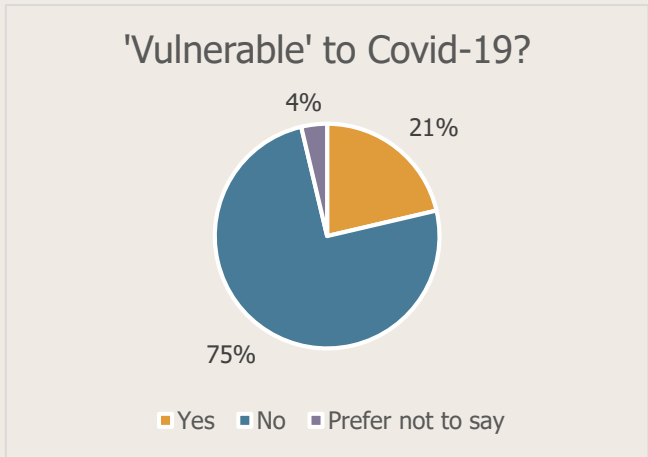
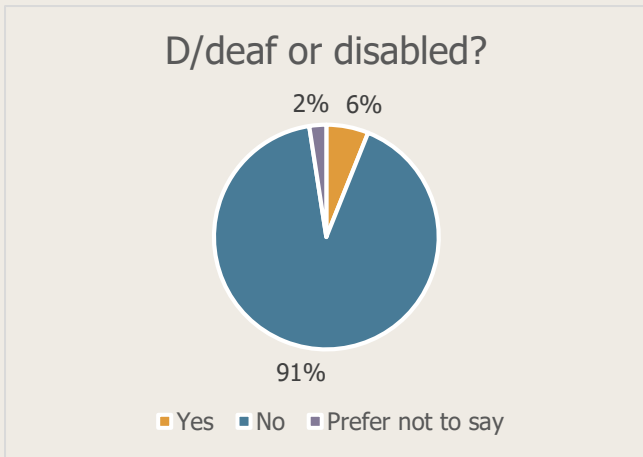
Data collected in the [Audience Agency Outdoor Arts audience report](#) (2018) showed the following breakdown of age for Outdoor Arts attenders:



Age	%
16-24	12%
25-34	21%
35-44	22%
45-54	18%
55-64	15%
65 & over	12%

This suggested Outdoor Arts audiences are dominated by younger cohorts and therefore we recognise that the data collected in the Getting Back Outdoors survey leans more towards the upper range of Outdoor Arts audiences. This could be reflective of the organisations which we collected responses through or a sign that older audiences are more likely to complete surveys.

Sample breakdown (cont.)

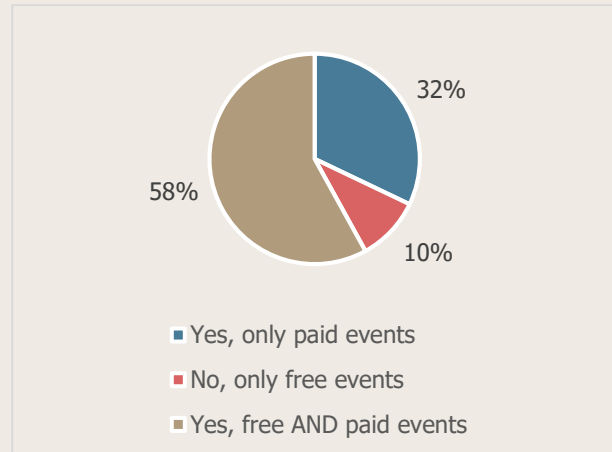
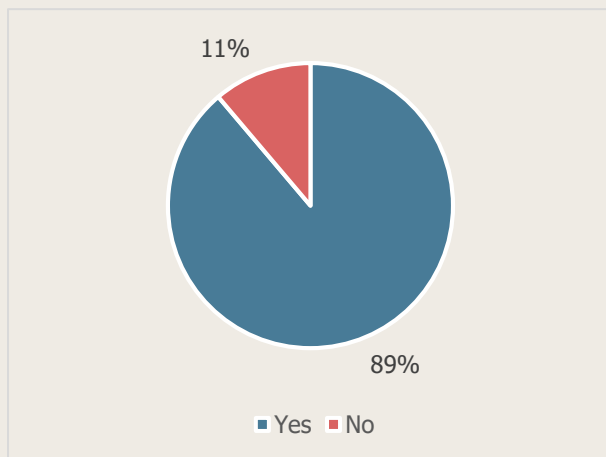


Section 2: Overall findings

2.1 Previous attendance at Outdoor events

Q: Have you attended an Outdoor Arts event before? / Have you paid to attend Outdoor events?

Responses: 5,273 / 4,519



Almost
90%
have paid to attend outdoor events

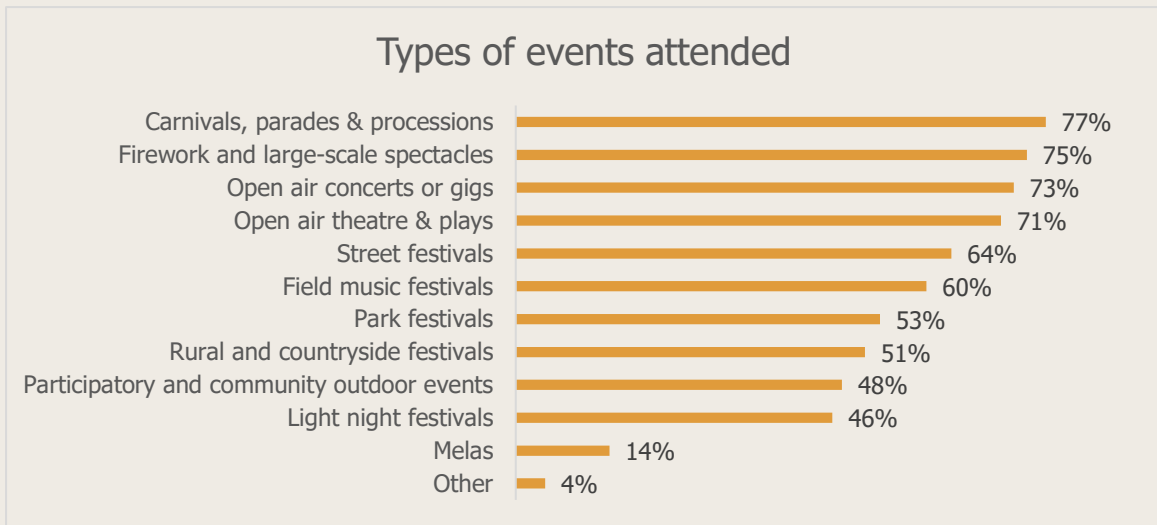
Segment analysis

- **Frequent attenders** were more likely to have paid to attend Outdoor Arts events - 97% had been to paid events.



This high number of respondents who said they had previously paid is interesting, as so much of the sector prides itself on free events. In terms of the organisations which gathered the most responses, many of them engage with ticket buyers and also run free events, so it indicates quite a broad range of outdoor experiences. From the types of events attended (below), we can see further evidence of this, with similar scores for free events such as carnivals and processions and paid events such as open-air theatre.

Q: Which types of Outdoor Arts events have you attended before? Responses: 4,528

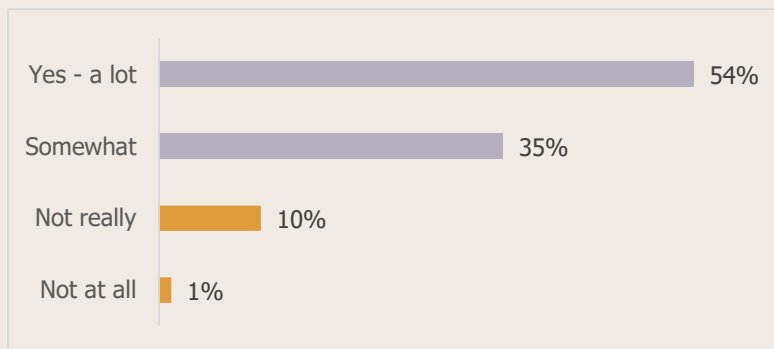


Segment analysis

- **Under 35s** were more likely to have previously attended firework and large-scale spectacles (85%), field music festivals (75%) and light night festivals (62%).
- 71% of **Over 55s** have attended open air theatre & plays. However, they are still very likely to have been to carnivals, parades and processions (74%).

Q: Are you missing the opportunity to attend Outdoor Arts events at the moment?

Responses: 4,518



Almost
90%
are missing Outdoor Arts

Segment analysis

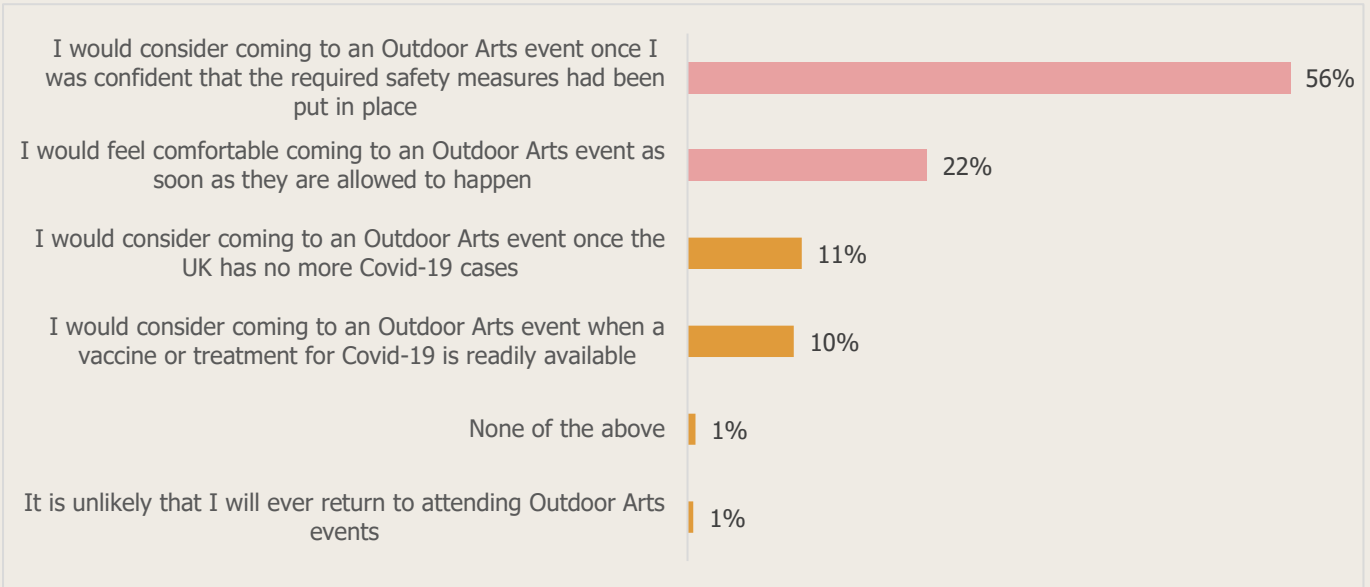
- **Frequent attenders** were missing Outdoor Arts the most – 86% said they were missing attending 'a lot'.
- Only 49% of **Infrequent attenders** said they were missing attending.

“

"I really miss attending, supporting and enjoying outdoor arts events. I really hope that the outdoor arts sector can lead the way back to live performance."

2.2 Coming back to Outdoor events

Q: Please tell us which of the following statements best fits how you would feel about attending an Outdoor Arts event. *Responses: 5,046*



Segment analysis

- 87% of those who identified as **vulnerable to Covid-19** said they were missing attending, but only 59% would consider attending. They are also more likely to want to wait for a vaccine or treatment (21%) or for there to be no more cases in the UK (18%).

78%
would consider coming
to outdoor events

"I would very much like to get back to outdoor events with my family. I am aware that the spread of Covid-19 is much lower while outside, so I would feel more confident to enjoy entertainment outdoors."

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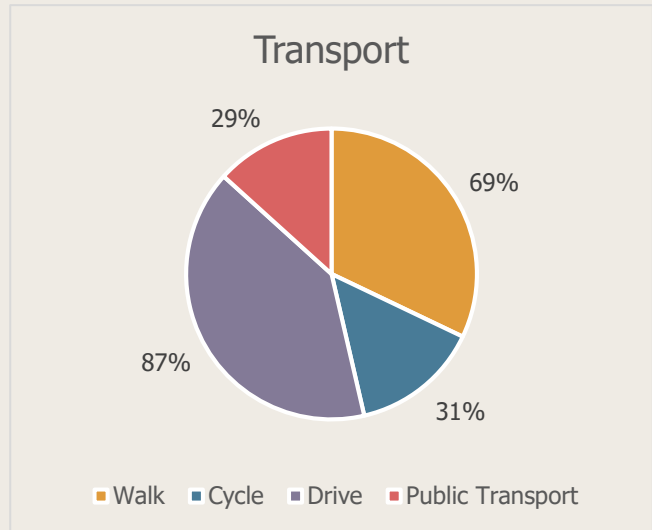
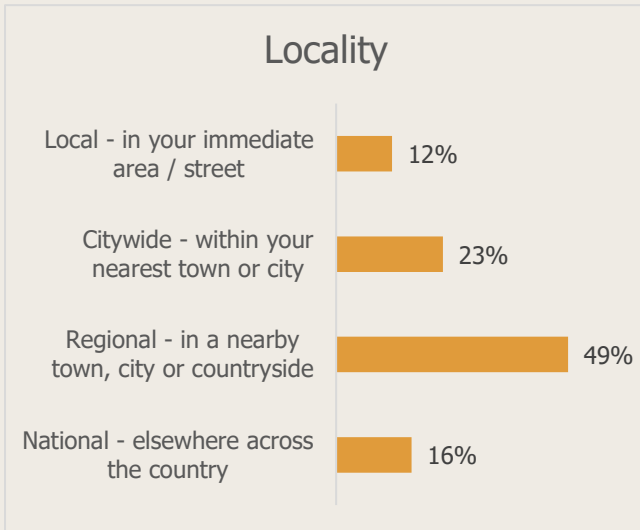
"I would love to go to an outdoor event but would feel really uncomfortable being part of a crowd. If you were to put in place safety measures, I would need to know what they are, if they're actually going to be enforced, and that there was an easy way to leave if I felt uncomfortable."



It is pleasing to see that our respondents are missing the opportunity to attend Outdoor Arts – and over half are missing us 'a lot'. There is a clear appetite and readiness to return, however, the vast majority indicate that they want to be assured that events are safe, and measures have been put in place.

Q: How far are you willing to travel to an Outdoor Arts event? / How are you willing to get there? *
Responses: 3,624 / 3,623

*For locality, respondents were asked to select the answer which represented the furthest they were willing to travel. For transport, they were asked to select any methods of transport they would consider using.



Segment analysis

- **Frequent attenders** were willing to travel further – 31% would travel nationally to attend.
- **Infrequent attenders** wanted to stay closer to home – 21% would only attend events in their local area.



Our respondents indicate that they are willing to travel a reasonable distance to attend outdoor events but the desire for using public transport remains low. This is an challenging dilemma for producers who may be trying to reduce their carbon footprint. While people are keen on local events, the high score for walking is also useful. We may wish to consider more localised events which avoid the need for public transport and driving.

"Small events that are local (removing the need to get on public transport as we could walk or cycle as a family) are more likely to appeal to us than events likely to attract a big crowd."

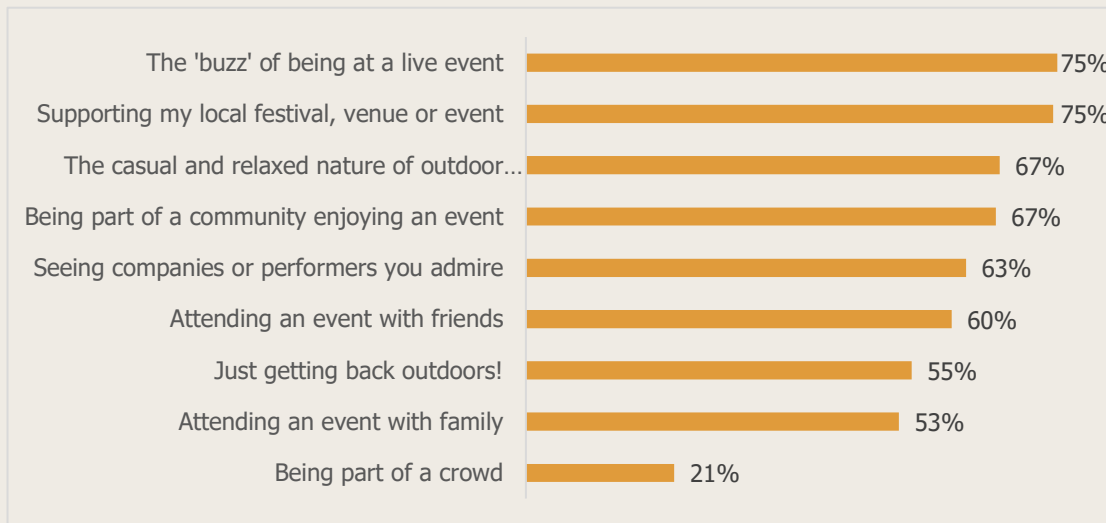


"An event that could travel to a number of locations might be a great way of encouraging communities to re-congregate."

"Performances which require driving can feel exclusive & disheartening to those who don't drive or don't have a car & we shouldn't be encouraging more use of cars."

Q: What are you most looking forward to about attending Outdoor Arts events again in the future?

Responses: 4,553



Segment analysis

- **Under 35s** are more likely to be looking forward to the social aspects of Outdoor Arts – 73% are looking forward to attending with friends.
- **Frequent attenders** are looking forward to the 'buzz' of live events even more (86%) and are more likely to be looking forward to supporting local events (85%) and seeing artists they admire (76%).



There is a difficult contradiction here: the 'buzz' of a live event scores so very highly, while 'being part of a crowd' scores (understandably) the lowest – however many of us would recognise that the 'buzz' often relies on the crowd! Clearly, we are going to have to find ways to replicate that experience without the mass gathering. It is also very pleasing that the support for local festivals and venues is high, indicating loyalty to the outdoor performance, and the wider arts and culture sector in these difficult times.

"Social distancing is important to me...and I know it's hard to achieve that and still get the buzz and community feeling."

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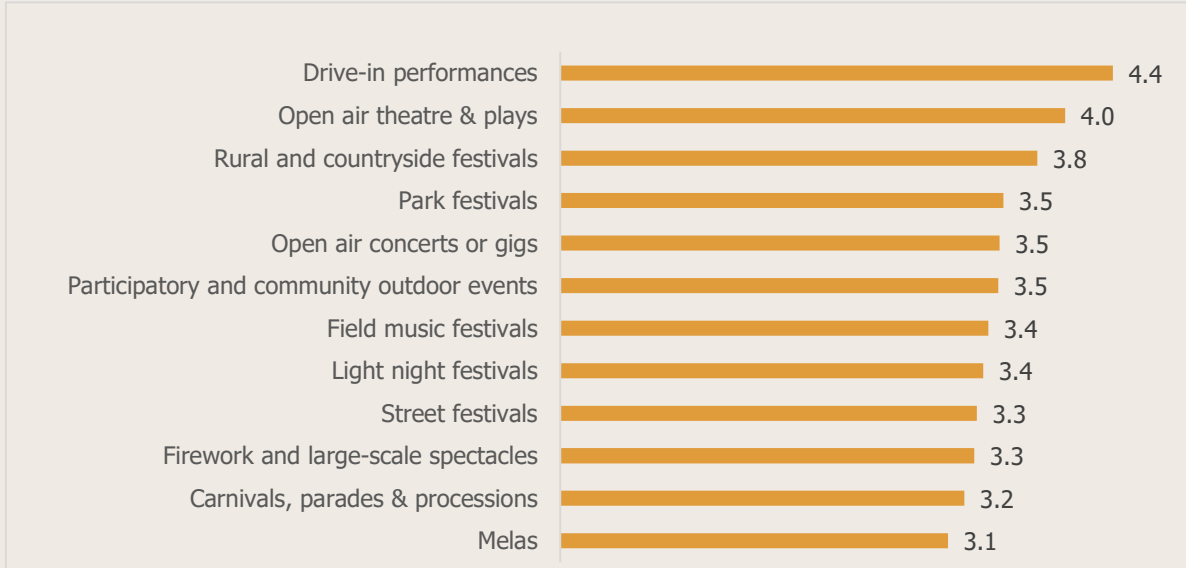
"The thought of seeing an outdoor theatre performance, picnic at the ready is lovely."

"Outdoor Arts events are important to create a shared community & experience."

"Bringing some joy back to our lives through events like these would be wonderful. I can't wait for some of our exciting outdoor opportunities to return."

2.3 Safety and Comfort

Q: On a scale of 1-5 (where 5 is most comfortable), how comfortable would you feel coming back to different types of Outdoor Arts events, if you felt confident that the appropriate safety measures were in place? *Responses: 3,831*



Large-scale
events score
lowest



Before the pandemic, it is likely that 'Drive-in performances' would hardly have featured on either the professional sector or the audience's consciences - an indication of how fast things have adapted.

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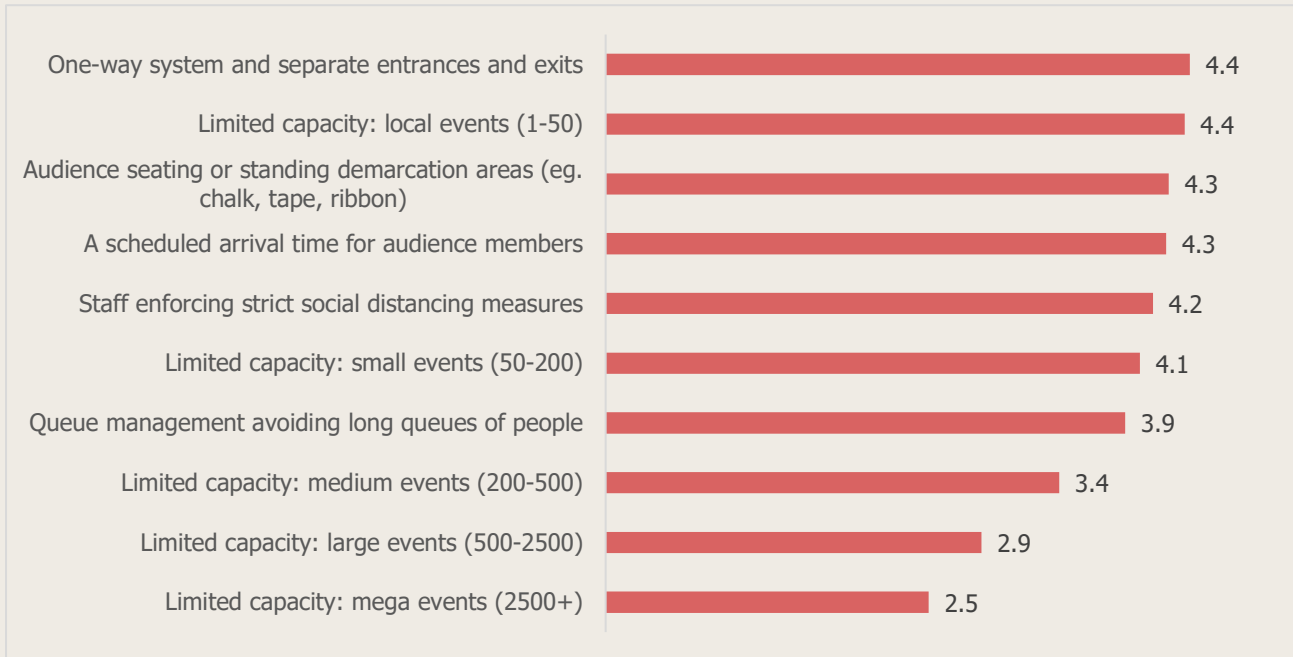
"Small scale, local events of any type would be welcomed where we can feel safe with friends and family at a modest scale of event... we live in a rural location and don't want to travel into any large cities / large crowds."

"I'd feel happier with seated events outside rather than parades."

"Events in a park would make me feel safer because you can avoid the crowds more easily."

Q: On a scale of 1-5 (where 5 is most comfortable), how comfortable are you with the following aspects of outdoor performance? *Responses: 3,650*

Physical Space



Low capacity and distancing measures score highest



Much in line with our instincts and the official advice, careful management of space and reduced capacity are key to making audiences comfortable with attending outdoor events.

“

"It is important for audience to have information in advance of practices and procedures that will be in place."

"Clear guidance is needed that can be easily followed and adhered to, with no ambiguity."

Q: On a scale of 1-5 (where 5 is most comfortable), how comfortable are you with the following aspects of outdoor performance? *Responses: 3,650*

Hygiene



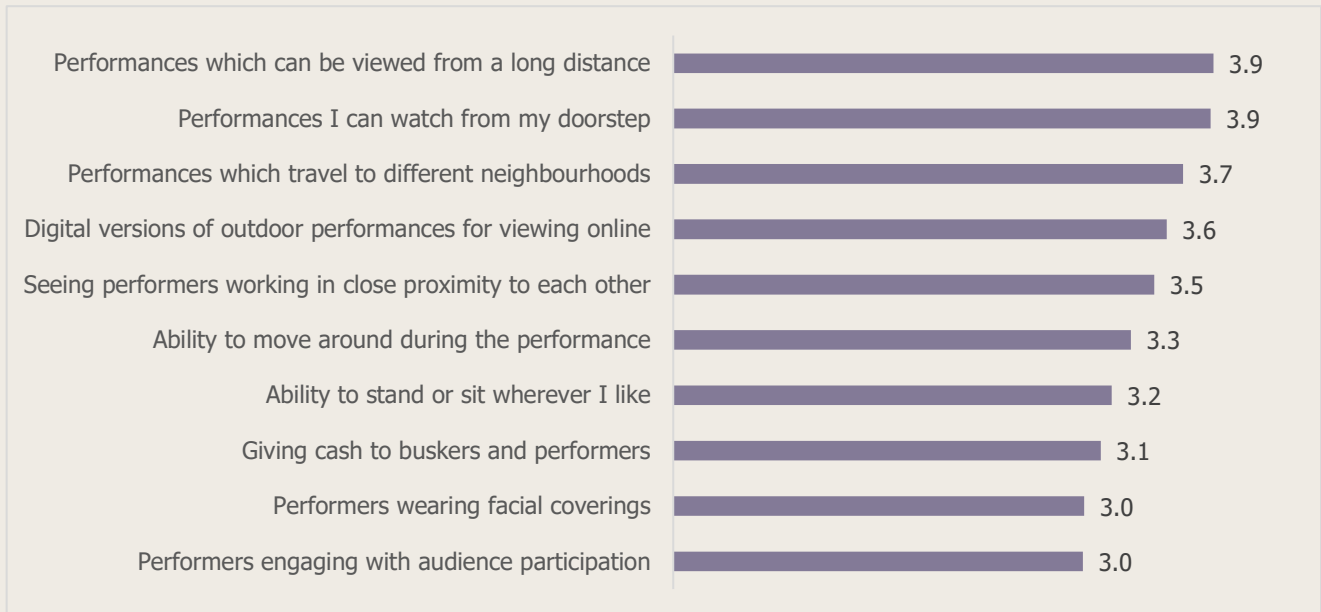
Audiences want hand sanitiser and cleaning procedures



"If I can attend an event and not feel that there's a problem with space and know that other risks are being properly managed, such as free hand sanitizer and queue management, then I'm happy to take the risk."

Q: On a scale of 1-5 (where 5 is most comfortable), how comfortable are you with the following aspects of outdoor performance? *Responses: 3,650*

Performance



Audiences prefer
hyper-local and distanced
events

Audiences are hesitant
about audience
participation

Segment analysis

- **Frequent attenders** are more comfortable with audience participation (3.3) and giving cash to performers (3.5).
- **Under 35s** are more comfortable with having the ability to move around during performances (3.7) and sit or stand wherever they like (3.5).



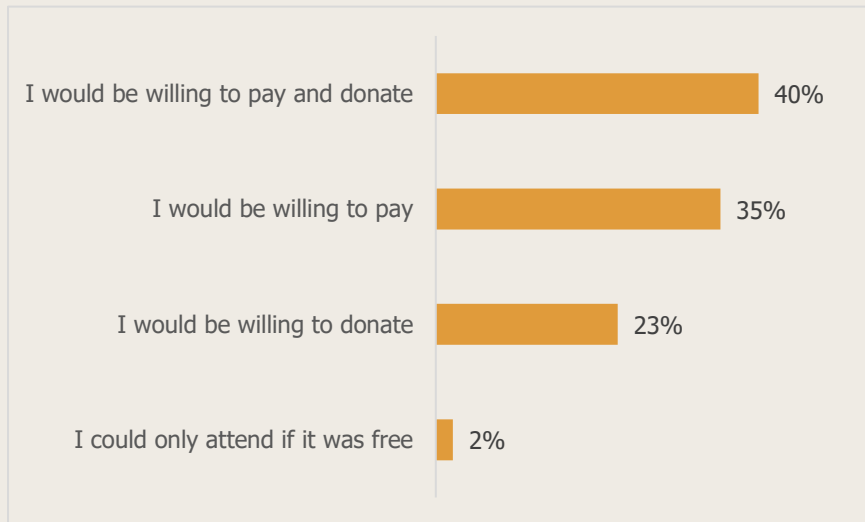
Creatively, artists have already begun to find ways to respond to new ways of presenting work – and much of the work of the Outdoor Arts sector is already useful. Aerial and stilt performances are ideal for long-distance viewing, walkabout and small-scale busking can readily be seen from a doorstep. Of course, much of the artistic content is highly impacted by social distancing - and artists are being incredibly imaginative about incorporating these measures into their performances and providing clear and reassuring explanations of how they are able to work together in physical proximity.

2.4 Willingness to pay

Q: Most Outdoor Arts events are free to attend, but in the current circumstances would you be willing to pay or support with a donation?

Responses: 3,623

98% are willing to contribute financially



Given the free nature of so much outdoor work, it is a remarkably high score for willingness to contribute financially. The democratic nature of free work is at the heart of what we do, but there may be avenues to explore in terms of generating income from audiences.



"We are very strong supporters of arts and culture - local, regional and national and would be happy to donate / pay to support activities."

2.5 Other audience considerations

“

Accessibility: *"When planning events, consulting people with access needs is important so that they are able to attend safely and can enjoy the show."*

“

Alcohol and social distancing: *"Events where alcohol is sold would be less likely to attract me, as people drinking a lot may lead to a casualness about social distancing."*

“

Striking the right balance:

"There's a balance to be struck between making me feel reassured that you have the Health & Safety aspect of things in hand, and not making me feel tense and over-regulated."

"I think the most important thing to consider will be how to manage crowds and enable people to come together safely but in such a way as to not detract from the unique experience of outdoor



Overall, the Getting Back Outdoors survey results indicate a very positive response to the notion of getting back to outdoor performance in many different guises - alongside a considered understanding of the measures that can make that possible. Already we have seen performances and festivals returning to our streets and open-air venues - and there have been so many great examples of responsible attitudes to public, artist and performer safety. It is important that we continue to respond to this very clear demand for our work and to the safe and considered way we deliver it.

Appendix 1:

About Outdoor Arts UK

OutdoorArtsUK is a national membership and strategic organisation that aims to bring together the many diverse parts of the Outdoor Arts sector. OutdoorArtsUK celebrates the wonderful work, amazing talent and tremendous achievements of the brilliant individuals, companies and organisations working in this most accessible of art forms.

www.outdoorartsuk.org

About Indigo-Ltd

Indigo Ltd is a specialist consultancy working in the Arts, Heritage and Cultural sectors. We specialise in projects involving marketing, audience development, branding, research and consultation, strategic planning, fundraising and organisational development.

Founded in 2007, Indigo's partners and associates spent their earlier careers as marketing and fundraising practitioners from cultural organisations and are regularly embedded in cultural charities to develop their professional practise.

Katy Raines, the author of this survey, is founding partner of Indigo, and regarded as one of the UK's leading consultants on data-driven marketing for Cultural Organisations. She has developed and led research and implementation programmes for large and middle scale organizations throughout the UK and Europe. She has a particular passion for CRM and segmentation, and in using data to effect change and drive an audience-led approach for any cultural organisation.

www.indigo-ltd.com

Appendix 2: Participating Organisations

Activate Performing Arts
Appetite
Artichoke Trust
Articulation
b-side
Babbling Vagabonds Storytelling Theatre
Bash Street Theatre
Birmingham Hippodrome
Bournemouth Arts by the Sea festival
Circulate London
City of London Corporation
Dancin' Oxford (Oxford City Council)
Derby LIVE
Durham County Council
Eden Arts
emergency exit arts
Festival of Thrift
First Art
Fluid Motion Theatre Company
Holmfirth Arts Festival
Justice in Motion
Light Night Leeds
Mandinga Arts
Mimbre
Oldham Council - Events
OutdoorArtsUK
Quays Culture
Severn Arts
SO Festival (Magna Vitae TLC)
Tangled Feet
The National Festival of Making
Told by an Idiot
Waterside Arts / Refract Festival
Wild Rumpus
WildWorks