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Date:
*November 2013*

CREATIVEWORKS LONDON WORKING PAPER NO.1

URL:
http://www.creativeworkslondon.org.uk/publications/working-paper-1

# Overview of Business-Facing Arts Audience Research[1]

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*October 2013*

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[1] This report has been peer-reviewed by The Audiences Strand of Creativeworks London.

# Introduction

One of the major challenges facing anyone wanting to come to grips with existing research into the field of audiences is the large number of academic disciplines that tackle the subject, and the wide-ranging and diverse approaches taken by each of them. For the non-specialist, the array of knowledge and enquiry into the social characteristics, distribution, behaviour and experiences of audiences is so varied as to be off-putting. I propose to divide audience research into six related categories, as follows:

(i)     Business-facing research into arts audiences

(ii)    Academic-facing research into arts audiences

(iii)   Academic research into cultural behaviour, including the social composition of audiences

(iv)    Academic research into specific artforms

(v)     Knowledge through practice


The division suggests itself because of the different approaches taken by researchers in each of these categories. This report is in two sections; the Introduction provides an explanation of the six categories outlined above, and is followed by a survey and overview of resources in Category (i). The purpose of the Introduction is to contextualise the survey of resources, and to demonstrate that the resources mentioned in the survey are part of a very specific culture of research: business-facing research into arts audiences. This introductory section provides a brief overview of other research cultures.

Category (i) covers material presented in non-academic publications ranging from government, funding body and agency reports to professional journals of arts marketing. The common factor is that the studies are undertaken from the starting point of finding out about a particular audience group (for example, the audience for the publicly funded arts), with a secondary, usually explicit goal of discovering ways to increase the numbers of that same group. One might say that this branch of scholarship, crudely speaking, focuses on the 'demand side' of

artistic practice.  Indeed, artistic practice itself is often only contingently considered.

The second category, 'Academic-facing research into arts audience development' covers research into arts marketing and related disciplines published in scholarly, 'academic-facing' journals, and includes the work of Tak Wing Chan, John Goldthorpe and Dirk Vom Lehn, amongst others.

Category Three, 'Academic-facing research into cultural behaviour, including the social composition of audiences,' is primarily focused on human behaviour.  This category includes the academic subjects of Anthropology, Human Geography, Psychology, and the Social Sciences, generally speaking.  In these subjects, audience research occurs as part of general research into cultural behaviour, encompassing social interaction on every level, from the individual to the crowd. The focus includes patterns of behaviour within institutional settings such as museums, galleries and concert halls, as exemplified by the work of Christian Heath.  The field of Music Psychology has yielded some particularly rich work on audience perception in the last twenty years, including the work of John Sloboda, Patrick Juslin, Stephanie Pitts and others.  Research into the social composition of audiences has been part of mainstream sociological research for thirty years or more.  It is exemplified by the work of Paul DiMaggio, Tony Bennett, Mike Savage and others who have looked at the class, income, ethnic and cultural base of different audiences, and how cultural consumption is related to social structures.

The body of research labelled 'Academic research into specific artforms' focuses on the 'supply side.'  This title refers to scholarship relating to artistic output, in its many different forms.  Thus, the academic disciplines of Musicology, Film Studies, Theatre/Drama Theory, History of Art, and so on, fall into this category. One of the main subject areas of any of these disciplines is the nature and form of audience perception and the effect of the artwork on the viewer (or listener/reader/etc).  Questions of effect (and affect), therefore, are here approached as a means to discover more about the artwork itself.  The fields of

Aesthetics and Philosophy of Art are particularly relevant to questions of audience perception; see, for example, the work of Lawrence Kramer and Nicholas Cook on the subject of music listeners.

The final category, 'Knowledge through practice,' refers to research and practice-based knowledge that may not be available in any publications, but that informs the activities of organisations who engage with audiences. Much of the information and knowledge that comes from the Creativeworks London-funded collaborative projects will fall into this category. As with Category (i), this category of audience research is dominated by engagement with a particular group (for example, the audience for a company's work), and the need to expand that group.

From the brief outline above, it will be clear that this report uses the word 'audience' as it pertains to the arts, rather than to refer to the consumer base generally (note: this is not a generally-applied limitation; other Creativeworks London work treats of 'audience' as 'consumer'). This division is made for the purposes of limiting the material under consideration, which otherwise would be beyond the scope of our report. Furthermore, most of the research outlined in this report is concerned with audiences who are physically present at an arts event or performance. What activities constitute 'the arts' is a substantial question in itself, and one that deserves more space than is available here.[2] For the purposes of this paper, it is useful to mention the definition of the creative industries offered by the Department of Culture, Media and Sport (DCMS). This definition is by no means undisputed, and is quoted here only as a starting point for discussion: 'those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.' This definition includes advertising, architecture, the art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts,

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[2] For example, see Throsby, D., *Economics and Culture* (Cambridge: Cambridge University Press, 2001).

publishing, software and computer games, television and radio.'[3]  For the purposes of this report, we are primarily concerned with audiences who *attend* arts activities or events.  Thus, for example, the information contained in this report will be of relevance to considerations of an audience at a fashion show, but only contingently relevant to considerations of fashion consumer behaviour more generally.  Once again, this limitation is imposed in order to render the subject more accessible to exploration.

It is clear that each example of audience research is likely to be inflected by the demands of the category into which it falls.  In any given situation involving audiences, a researcher might investigate any or all of the following: (i) the socio-cultural purpose behind the human interactions taking place; (ii) the likelihood of specific individuals to attend similar events in the future; (iii) the creative response elicited by a particular experience; (iv) the socio-demographic make-up of the audience; (v) the physical behaviour of the crowd; and so on.

Thus, we can identify three difficulties with the field of 'Audience Research,' broadly defined: (i) the non-specialist might not know where to access existing research; (ii) once accessed, the volume and variety of research is daunting; (iii) the research itself is fraught with conceptual problems.  We have proposed that, as part of the remit of the Audiences Strand of Creativeworks London, we might begin to address the first two issues by creating a centralised database of key researchers, publications, and resources.  The third issue is faced by any academic research; namely, what effect do the concerns of the researcher have on the findings of the research?  To put it another way, how can we be sure we are asking the right questions, of the right phenomena?

Creativeworks London proposes a series of reports into existing audience-based research, bearing these concerns in mind.  The reports could be structured

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[3] Department of Culture, Media and Sport, *Creative Industries Mapping Document* (London: DCMS, 2001).  Available at: http://webarchive.nationalarchives.gov.uk/+/http://www.culture.gov.uk/reference_lib rary/publications/4632.aspx/ [Accessed 25/03/2013].

around the six categories named in the opening paragraph above.  This report is focused on business-facing audience research.  Here, readers can find a survey of available resources in that field.

# Business-facing Research into Arts Audiences

## 1. Introduction

'Business-facing research into arts audiences' refers to research into audiences conducted and disseminated specifically in order to inform arts organisations about their audiences. This research is driven by the demands of the arts industry to understand its audiences and to develop and broaden audiences for the arts.

Many arts organisations are already aware of the substantial amount of business-facing audience research in the public domain; some are not. Some are aware of its existence but lack the time to absorb the material. Small organisations, in particular, often operate without the resources to engage with anything beyond the core activities of the business. Equally, many academics with an interest in audience research are unaware of the findings of business-facing research organisations, which tend to self-publish or to publish in non-academic formats. The purpose of this report, then, is to provide an overview of the key research organisations and publications currently providing business-facing audience research. This report will give details of where to find research on particular subjects, as well as providing an outline of some key findings. It will also suggest further research questions.

## 2. Key Research Organisations

This section provides a brief introduction to several key research organisations.

The Audience Agency (TAA)
Formerly Audiences London, TAA is now a nationwide agency providing bespoke research services for arts organisations. Services include the following: (i) data analysis & profiling, (ii) research services & consultancy, (iii) audience development & marketing planning, (iv) community engagement, (v)

evaluation and consultancy, (vi) project management, (vii) organisational development & change management.  Due to the relationship between TAA and ACE, most TAA research is concerned with publicly funded arts organisations; commercial theatre such as West End or arena-based activities are effectively excluded, as are very small-scale companies who might not have the resource to use TAA.

TAA research is mainly, but not exclusively, drawn from box office data from participating organisations, with supplementary research tools such as questionnaires, surveys, and interviews also used.  Public-domain reports are available on the agency's website, although many of the more detailed research findings are available only to participating organisations.

Between 2012 and 2015, TAA is involved in a large-scale Arts Council England project entitled *The Audience Focus*, with the goal of creating a single framework for collecting, understanding and using audience information across the arts sector in England.

### Arts Marketing Association (AMA)

The AMA is a membership association supporting the development of arts marketing professionals through events, courses, training and resources.  The association encourages the development of practical skills, debate, and the sharing of experience and knowledge.  The Journal of Arts Marketing publishes AMA research, often on the subject of audiences and audience development, and back issues are available for purchase on the AMA website.  Some open-access publications are also available on the website.  The online resource, Culturehive, is an open-access 'knowledge hub' offering centralised access to information about audience research and development.  It covers the following areas:

- Engagement and participation
- Segmentation
- Marketing Strategy
- Digital Development
- Communication and Promotion
- Fundraising, Sponsorship and Philanthropy

[Arts Council England (ACE)](#)

Reports and Guidelines published by ACE are available on the 'Advice and Guidance' page of the ACE website. The key audience-focused reports are the *Insight* reports, which draw on the data from the Taking Part survey (see DCMS, below). Many other ACE reports are also relevant to audience development, in particular with respect to participatory arts.

[National Endowment for Science, Technology and the Arts (Nesta)](#)

Nesta is an independent charity that supports innovation (amongst individuals and organisations in all sectors) by providing investment, grants, networking and information. Nesta conducts and publishes its own research, available on the 'publications' page of its website. The report 'Counting What Counts: What Big Data can do for the Cultural Sector' (February 2013) is specifically aimed at arts organisations concerned with audience development.

[Department for Culture, Media and Sport (DCMS)](#)

Every three months, the DCMS publishes the latest statistical release of Taking Part, its rolling survey of the UK population's leisure activities. The statistical releases are available on the DCMS website, and are used as the basis for much audience-focused research conducted by third parties, such as university departments or other research organisations. The DCMS also publishes its own reports drawing on the Taking Part data, as well as other research. For example, the [CASE programme](#) is a 3-year joint research programme designed to explore how best to deliver high quality culture and sporting opportunities to a wide audience.

[Society of London Theatre (SOLT)](#)

SOLT represents the producers, theatre owners and managers of the major commercial and grant-aided theatres in central London. SOLT runs a wide range of audience-development programmes to promote theatre-going, and has published a number of reports on West End audiences based on member's box office data. These reports are available to purchase through the SOLT website.

## 3. Key Online Resources

This section provides links to some key online resources, in three categories: (i) Primary Sources; (ii) Secondary Analysis; (iii) Service Providers.  Some resources appear in more than one category.

### (i)    Primary Sources

Taking Part Statistical Release

See Section 2 (above).

### (ii)    Secondary Analysis

The Audience Business:

Scottish Audience Development Agency.  'Resources' page includes open-access publications and case-study reports.

Arts Council England

See Section 2 (above).

The Audience Agency

See Section 2 (above).

Audiences Europe

Online audience-development network.  Includes open-access publications on the 'resources' page.

European Commission Culture Documents

This page contains links to EC-commissioned studies into subjects including mobility, education and creativity, arts and the economy, and strategies for development.

Culture Map London

Maps of London developed by Audiences London (see TAA, above), using Snapshot London data.

Arts Marketing Association Resources

See Section 2 (above).

NESTA Resources

See Section 2 (above).

### (iii)    Service Providers

The Audience Agency

As above.

The Audience Business:

As above.

Art Service

Consultancy service for arts organisations: brief descriptions of case studies are listed but the full reports are not publicly available.

British Population Survey

A market research organisation offering services such as insight, segmentation, modelling and interpretation of survey results.

## 4. Subjects covered

This section offers some suggestions for where to find information on particular subject areas, as well as a brief overview, in each case, of some key findings from the named research organisations.

### i. Demographics of Audience Attendance according to artform, venue, region, local area

TAA has arguably the best available information on these patterns with respect to publicly funded arts, and the maps on Culturemap are a useful open resource. The information is restricted by being drawn from box office data, which gives limited information on demographics and only gives details of bookers, rather than attenders. TAA uses Mosaic profiling to estimate by proxy the details of attenders, including age and socio-economic grouping.[4]

The key open publication from Audiences London (now TAA) is the Snapshot Audience Report (2012). The report is an analysis of box office data drawn from 36 'key London cultural organisations.' The Snapshot project began in 2005 and is ongoing. The 2012 report is based on data from 1st Sept 2009 to 31st August 2010.

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[4] Mosaic segments are explained here: http://guides.business-strategies.co.uk/mosaicuk2009/html/visualisation.htm [accessed 9/09/2013].

The Snapshot report uses Mosaic profiling to infer audience demographics from postcode data.[5]  The report shows that audiences for the performing arts appear to have grown since 2007: more tickets were bought, by fewer households, with an overall decrease in ticket yield.  Most bookers are 'Liberal Opinions' or 'Alpha Territories' households; however, between venues there can be a big difference in audience demographic.  The small number of households who attend more than once per year account for a disproportionately high percentage of ticket income: in general, TAA has found that 70% of bookers are first-time bookers at that venue, but most box-office income is generated by the remaining 30%, who are repeat bookers.[6]  These figures correlate with the work of sociologists Mike Savage and Paul DiMaggio, who have shown that a small group of high social status, frequent 'culture' attenders attend many events, while a much larger group of people go to far fewer.[7]

The Snapshot report uses 43 codes to classify events, allowing the reader to develop a clear picture of what sorts of activities are covered or omitted.[8]  Since the report is specifically to do with attendance at particular, named organisations, it should be noted that it does not inform us about cultural participation in general.   However, the first sentence of the report is 'Overall, audiences for the arts seem to have grown since 2007.' We should note that 'the

[5] *Snapshot London: Performing Arts Report* (London: Audiences London, 2012). Available at http://www.audienceslondon.org/4024/our-resources/snapshot-london-performing-arts-audience-report.html [accessed 25/03/2013]

[6] Anne Torreggiani presentation at TAA Roadshow, Southbank Centre, 17/10/2012.
[7] See, for example, Paul DiMaggio and Michael Useem, 'Social class and arts consumption,' *Theory and Society*, March 1978, Vol. 5, Issue 2, 41-161; Brigitte Le Roux, Henry Rouanet, Mike Savage and Alan Warde, 'Class and Cultural Division in the UK,' *Sociology*, December 2008, Vol. 42, No. 6, 1049-1071.
[8] Ballet, Carnival, Chamber & Recitals, Children & Family [Branded, Community/Amateur, New Writing, Other, Pantomime/Christmas Show, Plays/Drama], Circus Arts, Classical Choral, Comedy & Comedians, Community/Amateur [Dance, Music, Theatre], Contemporary Dance, Dance Talks, Exclude, Film/Cinema, Film/Cinema Talks, Folk, Jazz, Literature, Mainstream Musical, Museum & Exhibits, Music Talks, Non-Mainstream Musical, Opera, Orchestral, Other Choral, Other Talks, Other Theatre, Plays/Drama, Plays/Drama Talks, Pop & Rock, Popular Classical, Street Arts, Variety/Cabaret/Entertainment, Visual Arts, Workshops [Adult/Child], World Dance, World Music.

arts,' here, refers specifically to publicly funded arts and may not be representative of cultural behaviour as a whole.  Some examples of arts activities that are not captured in this picture include popular or folk music taking place outside the classical concert hall (e.g. in pubs, on the streets, in the home, or in commercial venues); music in religious ceremonies; graffiti; personal adornment; reading; cinema attendance; watching television; anything done in the home; anything done in commercial arts venues; and so on.

### ii.    Motivations for engaging

Again, TAA and ACE have built up considerable expertise with regards to motivation for attending or not attending publicly funded arts organisations.  According to ACE research (*Arts Audiences: Insight*), most people who attend arts events do so as a means to socialise with friends and be entertained and distracted from the everyday routine.[9]  ACE has segmented all English adults into groups according to their reported arts attendance and attitudes to the arts.  There are 13 distinct consumer segments, divided into three large-scale groups: 'highly engaged,' 'some engagement,' and 'not currently engaged.'  Only a tiny proportion of audiences – the 'highly engaged' – talk about 'life-changing' or 'transformative' experiences associated with the arts.  However, most of those who work in the arts are part of the 'highly engaged' group.  As a result, the industry may be at risk of over-emphasising the needs and expectations of a very small proportion of the audience.

TAA suggests that risk is a major factor in determining arts attendance.[10]  Risk can be defined in a number of ways and will have different manifestations for different people.  In this context, risk is associated with expectations: with people wanting to know what to expect from an experience.  According to this theory, potential audience members want to be able to assess the nature and quality of the activity before they engage with it.  TAA proposes that, as a result of audience aversion to risk, audience development initiatives that are founded on the idea of 'renovating' an art form in the hopes of renovating the audience

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[9] The *Insight* reports are based on *Taking Part* data, in which people answer questions about their arts attendance.

[10] Anne Torreggiani; presentation at TAA Roadshow, Southbank Centre, 17/10/2012.

may run the risk of attracting highly engaged attenders and people from within the arts industry, and putting off the less engaged.

Most people who attend the arts have third level education; education is the strongest correlative factor common to those who engage in the arts.[11] (An interesting question would be what else they have in common; perhaps, for example, living far away from place of origin and kin-based social structure? The correlation between arts attendance and education is certainly multi-factorial.) Along with education, habits formed in childhood by family behaviour are another strong indicator of likelihood of adult arts attendance. TAA found that school trips were less significant than trips made within the family.[12]

For the most part, cost is not a significant barrier to attendance (although *perceived* cost might be); those not engaged in arts activities generally cite other barriers, such as a feeling that the arts are 'not for my type of person.'[13] Free ticket schemes are therefore not usually helpful in attracting new audiences; rather, they are more likely to benefit a small number of highly engaged customers.

TAA found that people travel into the city centre for an arts activity but are very unlikely to travel outwards from the centre (summer festivals are an exception to this rule).[14] In part, this phenomenon might be explained by the concentration of arts offerings in city centres, although it seems that there may also be a psychological barrier to travelling outwards. Apart from the phenomenon of travelling inwards towards the city centre, people are unlikely to travel far from home for an arts activity. West End Theatre audiences are an exception to this rule, with many audience members attending the theatre as the main activity in a visit to London from farther afield (including international).[15]

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[11] Ibid.
[12] Ibid.
[13] Ibid.
[14] Ibid.
[15] Ipsos Mori, *The West End Theatre Audience* (London: The Society of London Theatre, 2008).

### iii.    'How to's for gathering and analysing data

Many arts organisations collect box office data and commission research and analysis of that data from organisations such as The Audience Agency.  As mentioned in section (i) above, box office data is useful, but of limited depth.  For example, one person in a group of friends might always book the tickets, thereby appearing disproportionately significant in an analysis of box office data, while the other attenders in the group would not appear at all.  Box office data can tell us what people attend, but not what they think of it or how it makes them feel, and the data tell us nothing about what peoples' other interests are.  In some cases, box-office data analysis is supplemented by audience surveys, interviews and focus groups, which can tease out more nuanced findings, though running the risk of misleading reporting on the part of respondents.  Equally, those who respond are likely to be the most engaged part of the audience and not necessarily representative of the audience as a whole, particularly in the case of surveys.

Box office data is of no use when considering non-ticketed experiences, although organisations are increasingly introducing registration wherever possible, in order to find out more about their audience.  For something like a sculpture in a park, however, this would be impossible, and many similar examples of 'pop-up art' would not normally yield traditional sorts of audience data.  The arts sector is increasingly interested in developing research to capture audience data for events of this nature.

Nesta has recently published a report recommending increased engagement of the cultural sector with 'big data.'[16]  The report recommends increased 'data-driven decision-making' (DDD) in cultural organisations, arguing that many cultural organisations rely on data drawn from their sales, which give only a limited picture of their audience base, as well as providing little or no

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[16] Lilley, Anthony and Paul Moore, *Counting What Counts: What Big Data can do for the Cultural Sector* (London: Nesta, 2013).  Available at: http://www.nesta.org.uk/about_us/assets/features/counting_what_counts [Accessed 25/05/2013.

information about the impact of their work.  However, the adoption of 'DDD' by the arts sector might risk challenging the creative authority and independence of the artist, curator and producer.

The growing domain of social media provides a further opportunity to discover more about audience profile and experience; however, advanced techniques for analysing social media are only now emerging.  Much current analysis of social media data is limited to basic groupings of 'positive' and 'negative' words, which provides too simplistic a picture for many arts organisations, who may be seeking to provide their audiences with a nuanced and thought-provoking experience not easily reducible to this sort of analysis.  The Creativeworks London Creative Voucher project 'Cultural Mobility through Social Intelligence' is pioneering the advanced analysis of social media data to inform an arts organisation about its audience.[17]

### iv.    Marketing techniques, in-house expertise and best practice

Organisations tend to have in-house expertise about the behaviour and preferences of audiences.  Theatres and museums know that people do not mind queuing to get in to a venue or event, but do not want to queue after the event is finished (for example, for the cloakroom or toilets).[18]  Many organisations have a close relationship with their audience, and a corresponding anecdotal knowledge of prevalent likes and dislikes.  This sort of knowledge is usually part of the skills and experience of arts professionals and as such is generally housed within organisations.

The Arts Marketing Association and The Audience Agency are currently collaborating on a project called Best Practice.  Best Practice will provide a national service to collate, share, train, and implement best practice in arts

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[17] The project is led by Chatterbox, in collaboration with the School of Electronic Engineering and Computer Science, Queen Mary, University of London, and the Barbican Centre.  The goal of the project is to assess audience response to the work of the Barbican.  More details are available at:
http://www.creativeworkslondon.org.uk/creative-voucher-scheme/round=1
[18] Personal communication with Barbican staff.

marketing and audience development. This work includes developing an online bank of resources and embedding best practice through training and one to one support.

## 5. Conclusion

This report is not intended to be an exhaustive analysis of business-facing audience research, but rather, to act as an aide to interested parties in navigating the many resources and publications available. It is very much to be hoped that this report can contribute to resources such as CultureHive (Arts Marketing Association) and Best Practice (Arts Marketing Association and The Audience Agency). Since there is a wide range of sources of information available to both businesses and academics, a centralised hub drawing them all together will be of great use to the sector.

However, business-facing research is only one section of current research into audiences, as noted in the introduction to this report. Many academic researchers, in many different academic disciplines, are also conducting research into audiences. It is only by drawing on this wider web of information that we will begin to build up a picture of the current state of play regarding knowledge about audiences.