



Live from Your Neighborhood

*A National Study
of Outdoor
Arts Festivals*

National Endowment for the Arts
Research Report #51

VOLUME ONE: SUMMARY REPORT

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Front Cover Photo: Latin sensation Julieta Venegas reaches out to a packed crowd at SummerStage in Central Park, New York City, NY. Photo by Jack Vartoogian©/FrontRowPhoto

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Live from Your Neighborhood

A Message from the Chairman

When I arrived at the NEA, I knew two words to be true: “art works.”

Over the past 12 months, I have used these two words to mean three things. They are a noun—works of art—the stuff that artists produce. They remind us of the ways that art works on audiences to engage and inspire us, to challenge us, to comfort us. And they are a bold declaration that arts workers are real workers who are part of this country’s economy and communities.

And as I have travelled around over the past year, I have seen again and again that art works everywhere.

It works in Memphis, Tennessee, and in San Francisco, California. It works in Idaho Falls, Idaho, and it works in Chelsea, Michigan.

It works in the iconic arts buildings—the museums, concert halls, and theaters—where many of us have had seminal experiences.

It also works in schools, community centers, and houses of worship, where many of us have important “informal arts” experiences.

Informal arts participation was the subject of a recent NEA Research Note, one that was especially important to me because it was not an area that the NEA had previously examined.

Similarly, this report is important for its very existence. This is the most comprehensive survey of America’s outdoor arts festivals that we know. And it is an important examination because earlier research has shown us that some 102 million people attend arts and cultural festivals annually in this country. That’s a lot of art working for a lot of Americans every year, and it is time that we started to examine these festivals more closely.

It is always my hope that NEA research reports spur questions, conversation, and action, and the data presented here are rich fodder for all three. After you finish reading *Live From Your Neighborhood*, I hope you will consider sharing your reactions with us on the Art Works blog at arts.gov.

Rocco Landesman

Chairman

National Endowment for the Arts

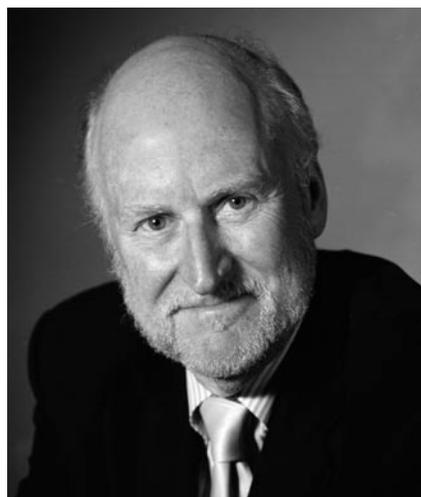


Photo by Michael Eastman

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Preface

This study began with a readily understandable impulse: to enumerate the nation’s outdoor arts festivals and to identify their shared and divergent traits, considering factors such as event programming, staffing, finances, and audience demographics.

The reason for this query is also straightforward. To date, no single report or database carries such comprehensive information about arts festivals nationwide. Given their pervasive role in American cultural life, this discrepancy is something more than a matter for regret. Repeat iterations of the NEA’s Survey of Public Participation in the Arts (SPPA) have shown that festivals and fairs collectively attract more unique audience members per year than most arts events.

In 2008 alone, more than 55 million U.S. adults attended at least one arts-and-crafts fair or festival in the past year, and 47 million attended at least one outdoor performing arts festival. (Approximately 14% of Americans attended both.) In sheer numbers, attendance rates for festivals far exceed those for many single types of art activities—classical music concerts, for example, or theater, ballet, or opera.

But the size of their audiences is not the only characteristic that merits serious study of arts festivals. Festival audiences, on average, are more diverse than those for many other types of live art events. As the SPPA data reveal (and as the present study observes), festival audiences seem to more closely resemble the general population than do other groups of art-goers. This finding is notable as arts organizations strive not only to build new audiences but, what may be more important, to actuate potential audiences that already exist among groups who engage in art through a variety of ways not often acknowledged or studied.

Over the last decade, arts presenters have learned to respond to shifting expectations among live audiences, particularly young adults. These audiences crave a new level of interactivity, they value personal creation and performance as part of the overall arts experience, and they appear to prefer those activities in informal settings. Outdoor arts festivals are uniquely poised to bridge those expectations with innovative arts programming. As the case studies in this report illustrate, festival audiences derive special satisfaction from encounters with artists and art forms in an open space that reinforces choice, experimentation, and free movement.

A related attribute of arts festivals is a blurring of boundaries. Nowhere is this feature more evident than in the relationship between festivals and the greater community. Local governments and businesses have invested in outdoor arts festivals as a token of civic pride, a pledge redeemed by the high level of volunteerism that propels festivals year after year, season after season. Studies by sociologists Mark Stern and Susan Seifert, coupled with the NEA’s own research on the statistical links between arts participation and civic engagement, provide a context for this understanding.¹

The word *festival* is etymologically allied with *feast*. Festivals convey a smorgasbord of arts experiences and opportunities that would baffle even the most intrepid researcher. Yet this study is a modest start. By examining a cross-section of U.S. festivals—self-identified as predominantly “outdoors” and featuring “arts and cultural” programming—we hope to have established a basis for future exploration into their significance for artists, audiences, and communities. Ideally, the survey and case study results will prompt other arts organizations to ask: what are festivals doing right and how can we replicate it?

Sunil Iyengar
Director, Research
& Analysis

Mario Garcia Durham
Director,
Presenting & Artist
Communities

Note

¹ Stern and Seifert’s work can be found at www.sp2.upenn.edu/SIAP/ and NEA’s research on the arts and civic engagement can be found at arts.gov.

Executive Summary

In aggregate, U.S.-based outdoor arts festivals surveyed by the NEA display the following characteristics:

A. DIVERSITY OF ART FORMS AND AUDIENCES

1. Activities spanning a wide array of art forms converge in a single space.

- A typical outdoor festival showcases many different types of art forms. Music is the most prevalent, with 81% of survey respondents reporting some kind of music performance at their festivals. Visual arts and crafts, dance, and folk or traditional arts also are frequently on display.
- Even festivals that concentrate on a specific art form are multidisciplinary in nature.

2. Festival audiences describe a demographically diverse audience, one that appears to mirror characteristics of the U.S. population.

- By gender and racial/ethnic composition, festival audiences resemble the general population as described by U.S. Census figures. Proportionately, however, festival audiences have slightly more females and African Americans, according to estimates from festival organizers.²
- Festival organizers report that 15% of audiences are Hispanic. This figure compares with 8% of “bench-

“What is exciting is that there is a lot of cross-pollination because there are all these different disciplines together. There’s a real fueling that goes on.”

– Festival artist

mark” arts audiences nationwide, as tracked by the NEA’s 2008 Survey of Public Participation in the Arts (SPPA).^{3,4}

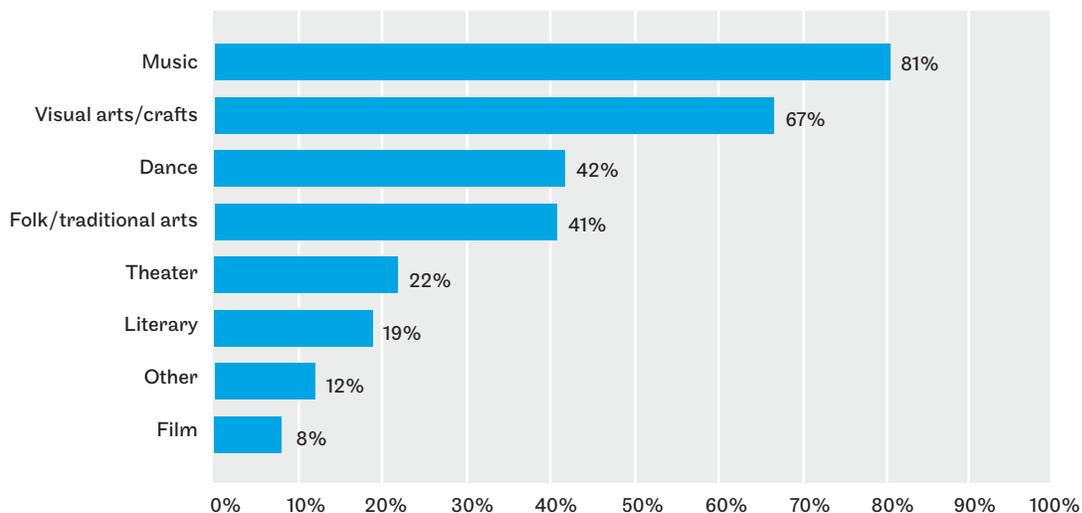
- African Americans are also in higher attendance at festivals than at most arts activities tracked by the SPPA: they compose 16% of festival audiences, compared with 7% of benchmark arts audiences.⁵

B. COMMITMENT TO QUALITY PROGRAMMING

3. Most outdoor arts festivals appear committed to achieving a high-quality arts experience for their audiences.

- 70% of festivals have an artistic staff or a staff person or volunteer whose primary role is arts curator or arts event programmer.
- 56% of visual arts festivals are juried.

ES Figure 1. Percent of Festivals, by Artistic Disciplines Represented (Percent of Festivals Presenting the Discipline) (*multiple answers allowed*)



ES Table 1. Percent Distribution of Events at Festivals, by Organizer’s Description of Festival Type

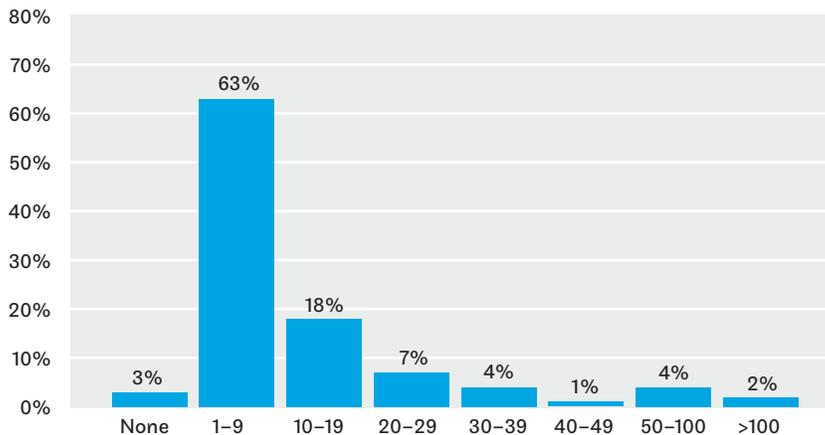
Self-Reported Festival Type	Type of Events Featured								
	Dance	Film	Folk/ Traditional Arts	Literary	Music	Theater	Visual Arts/Arts & Crafts	Other	
ALL festivals (n=1,376)	7%	1%	9%	3%	39%	6%	32%	3%	100%
Music festivals (n=309)	3%	<1%	4%	1%	87%	<1%	4%	<1%	100%
Arts & crafts festivals (n=255)	2%	<1%	8%	<1%	12%	<1%	77%	<1%	100%
Multidisciplinary festivals (n=188)	10%	3%	8%	4%	36%	5%	31%	4%	100%
Racial/ethnic festivals (n=97)	18%	<1%	24%	2%	37%	1%	13%	3%	100%
Visual arts festivals (n=95)	2%	<1%	2%	<1%	11%	1%	81%	2%	100%
Theater festivals (n=52)	2%	0%	<1%	1%	5%	91%	0%	0%	100%
Performing arts festivals (n=47)	9%	<1%	10%	8%	43%	14%	7%	9%	100%
Child/family festivals (n=43)	12%	3%	14%	4%	38%	4%	23%	2%	100%

ES Table 2. Demographic Make-Up of Festival Audiences, as Reported by Festival Organizers, in Comparison with U.S. Census and 2008 SPPA Figures

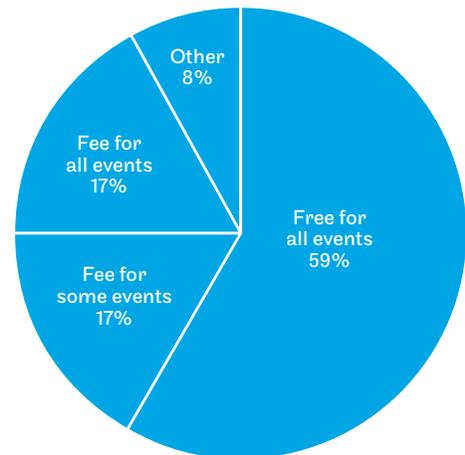
	Percent of Festival Audiences, by Demographic Group (2009 Festival Survey)	Percent of U.S. Population, by Demographic Group (2008 U.S. Census)	Percent of Audiences at NEA Benchmark Arts Activities, by Demographic Group (2008 SPPA)
Gender			
Male	45%	49%	45%
Female	55%	51%	55%
	100%	100%	100%
Ethnicity			
Hispanic	15%	16%	8%
Non-Hispanic	85%	84%	92%
	100%	100%	100%
Race			
White	73%	80%	86%
Black/African American	16%	13%	7%
Asian	6%	5%	4%
American Indian/Alaska Native	4%	1%	<1%
Hawaiian/Pacific Islander	2%	<1%	<1%
Other*	n/a	2%	1%
	100%	100%	100%

* Two or more races

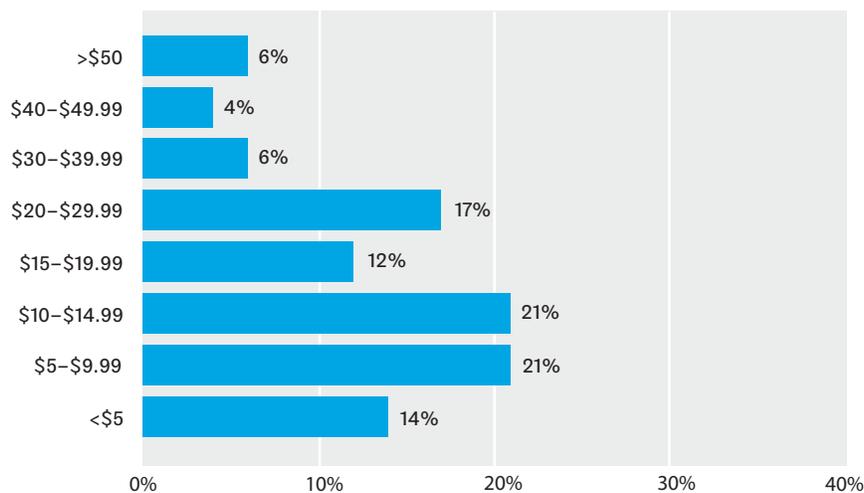
ES Figure 2. Percent of Festivals, by Number of Workshops, Lectures, or Other Educational Events Scheduled over Festival's Duration



ES Figure 3. Percent of Festivals, by Admission Fee Structure



ES Figure 4. Percent of Festivals That Charge for Admission, by Average Fee



4. Arts educational opportunities form a component of most outdoor arts festivals.

- Nearly two-thirds (64%) of survey participants said their festival offers formal educational activities or programming, such as lectures, artist demonstrations, and classes.
- Among arts festivals that offered educational programs, the majority (63%) held 1-9 educational events over the course of the festival.

C. LOW OR NO-COST ADMISSIONS

5. Most outdoor arts festivals are free of charge. Most others offer some form of discounted ticketing.

- 59% of festivals have no entry fee.
- Of festivals that do charge an admission fee, 56% charge less than \$15 per ticket and 68% charge less than \$20.

- Three out of four festivals that charge \$5 or more for admissions have a formal program to distribute free or discounted tickets.

D. INTEGRATION WITH THEIR COMMUNITIES

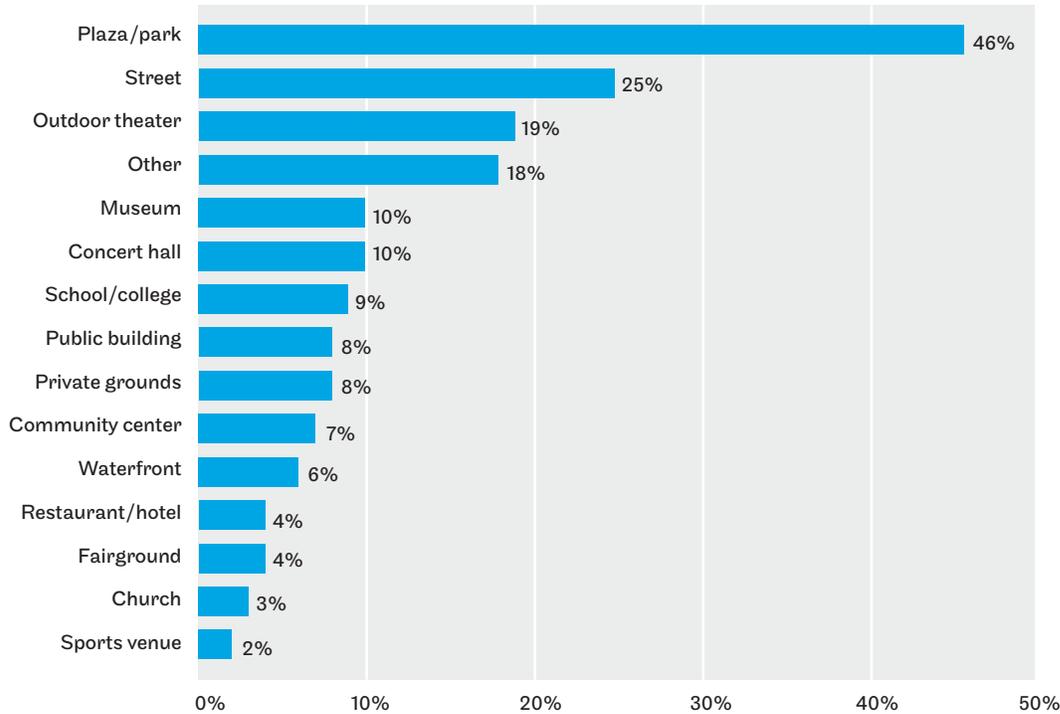
6. Most outdoor arts festivals occur in small to mid-sized communities.

- The majority of festivals (77%) take place in towns with fewer than 250,000 residents. Of those festivals, 39% occur in towns with fewer than 10,000 people.
- 17% of festivals take place in cities with a population of a half-million or more.

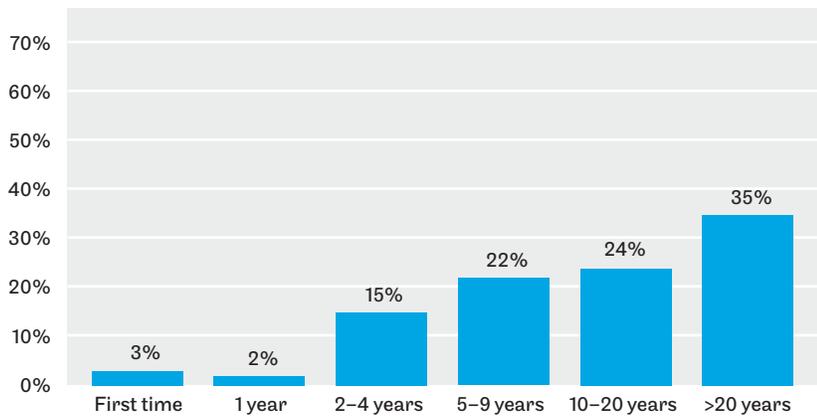
7. They occur in publicly accessible places that are family-friendly.

- Nearly half (46%) of outdoor arts festivals take place in a park or plaza, while a quarter hold some of their events in the street.

ES Figure 5. Percent of Festivals, by Venue During the Most Recent Season (*multiple answers allowed*)



ES Figure 6. Percent of Festivals, by Number of Years They Have Occurred in the Same Town



- In focus groups, audiences suggested that the ability to enter and leave programs, to get up and move around, and to make noise and dance, renders festivals especially attractive to families with younger children.
- In all but one case study site,⁶ more than half of survey respondents who live in households with children brought children to the festivals. In some cases, the percentage was very high: approaching 100% at Santa Fe Indian Market and 82% at the Houston International Festival and Lowell Folk Festival.
- Three-quarters (76%) of festivals in the national survey occur in the summer months (June, July, or August), when school typically is out.

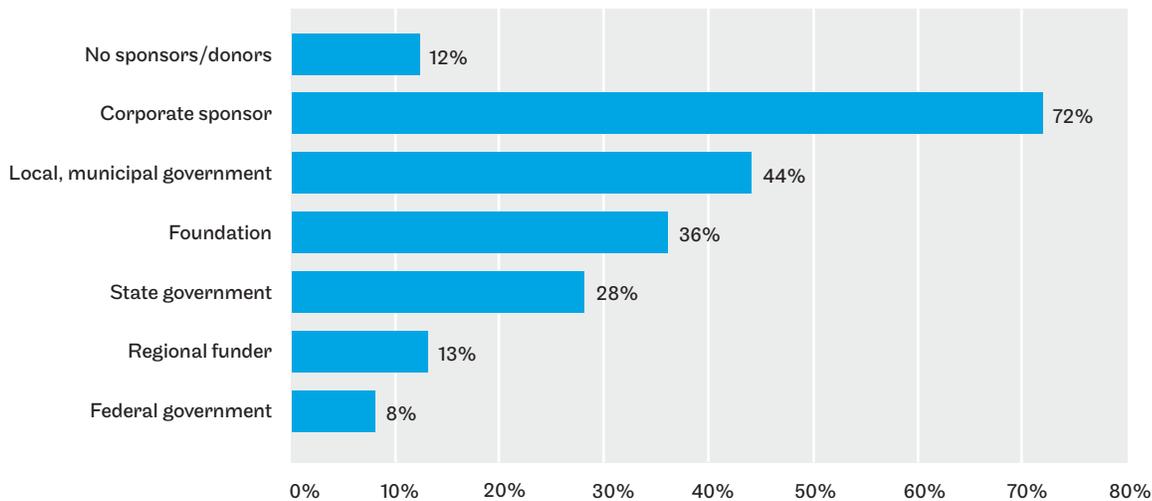
8. Most outdoor arts festivals (59%) have occurred in the same community for more than a decade.

- At each case study site, more than two-thirds of audience survey respondents affirmed that the festivals have enriched community life.

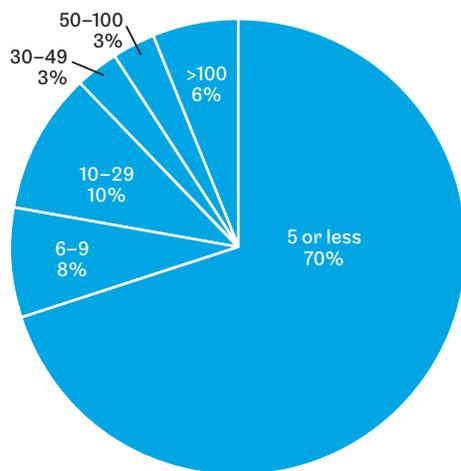
9. Support of local government agencies is crucial to the success of outdoor arts festivals.

- Case study participants reported that healthy, long-term partnerships with local government agencies proved essential in sustaining festivals' contributions to community life. Local departments of parks and recreation, police, and street-and-sanitation departments offer critical services to festival organizers.

ES Figure 7. Percent of Festivals, by Source of Sponsorship/Donations During the Most Recent Season (*multiple answers allowed*)



ES Figure 8. Percent Distribution of Festivals,⁷ by Organization’s Number of FTEs⁸



Festivals simply cannot take place without the cooperation of public agencies to provide services, licenses, and permits.

- After corporate sponsorship, support from local and/or municipal governments is the most common source of funding, with 44% of festivals saying they received such support.

10. Outdoor arts festivals rely heavily on volunteers and a small number of dedicated staff.

- 70% of festivals are run by five or fewer full-time equivalent (FTE) staff members.
- 61% of festivals have year-round volunteers (the median number is 2 volunteers), and 77% depend on seasonal volunteer staff (the median number is 20 volunteers).

Notes

² Age comparisons could not be made because of limitations on the age data for festival audiences. Survey respondents were allowed to check more than one age category to describe the festival audience. The “multiple response” nature of these data precluded comparisons to U.S. Census figures.

³ To facilitate analysis of long-term trends in the survey data, certain art forms have been designated in the SPPA as “benchmark” activities. There are seven benchmark arts activities: jazz, classical music, opera, musical plays, non-musical plays, ballet, and visits to art museums or galleries.

⁴ The SPPA, a general population survey, measures only adult (18 years and over) attendees, whereas all age groups are included in the festival audience estimates from the national survey.

⁵ The 2008 SPPA collected information on crafts fairs, visual arts festivals, and outdoor performing arts festivals. Demographic characteristics of individuals attending festivals and fairs are similar to those attending benchmark arts and, thus, are not reported separately. However, audiences for outdoor performing arts festivals in the SPPA showed greater racial/ethnic diversity than audiences for many benchmark live arts events.

⁶ Chicago Jazz Festival was the only case study site where fewer than half of survey respondents (39%) who live in households with children brought children to the festival.

⁷ The unit of analysis is the responding organization, of which there were 1,264, and not the 1,413 festivals that the organizers represented. Festivals, and not organizations, constitute the unit of analysis for the remainder of the report.

⁸ The question asked about the number of people working for the festival. If the festival was part of an organization, then the survey asked also about the number of people working for the organization.

Purpose and Background of the Study

Over a five-year period ending in October 2009, the NEA awarded over \$14,667,735 in grants to 859 organizations that characterized themselves or their projects as fairs or festivals. Festivals are uniquely suited to build new audiences of all age groups, socio-economic backgrounds, geographical areas, and degrees of prior exposure to the arts. The 2008 Survey of Public Participation in the Arts revealed that outdoor performing arts festivals attract a more diverse audience than many other live arts activities that the NEA currently tracks.⁹ Yet there is no comprehensive research or database that describes the range and impact of arts festivals in the United States.

Between April and October 2009, the NEA conducted a study of outdoor arts festivals in the U.S. The purpose of the study was to learn about the number and variety of festivals in this country, the artists they employ, the communities they serve, and the role they play in our nation's cities, towns, and neighborhoods. The study provides information about an important, relatively unknown segment of NEA constituency, thus allowing the agency to better address the field through relevant programs. At the same time, the study will create a platform for further analyses of the field and will allow more empirically based discussions about festival planning to occur among organizers and arts and civic leaders.

The study used a mixed-methods approach consisting of a national survey and seven case studies. The goal of the nationwide, online survey was to attempt to characterize, for the first time, the nation's outdoor arts festivals in a comprehensive, systematic way—to ask festival organizers about their audiences, arts programming, budgets, and operating structure. The purpose of the case studies was to gather detailed, contextualized data about festivals, festival-sponsoring organizations, artists, volunteers, and festival audiences. The scope of the investigation was deliberately broad and included interviews, focus groups, audience surveys, and background research about the festivals and their communities.

This report combines key results from the two investigative efforts, described in further detail below.

Additional information on the study methodology can be found on page 67.

I. NATIONAL SURVEY

The questionnaire for the online survey contained approximately 40 items. Topics ranged from the number and type of events held at the festival to sources of revenue to the number of employees and volunteers engaged. Two screener questions at the start of the survey ensured that organizations completing the survey were arts and/or cultural festivals with at least 50% of their activities held outdoors.

A list of more than 8,000 festival organizers was compiled from the applicant, grantee, and/or member databases of the NEA, regional arts organizations, state arts agencies, arts service organizations, and state festival and event associations. Of the 2,440 organizations that visited the survey website, over half (1,264) qualified to take the survey.

The 1,264 survey respondents¹⁰ reported on a total of 1,413 outdoor arts festivals.¹¹ Unless noted otherwise, the survey results in this report pertain to those festivals only; the 1,413 festivals—not the 1,264 responding organizations—are our unit of study and analysis.

Figure 1, which illustrates the geographic distribution of the 1,413 festivals, shows that every state in the country except for Alaska was represented in the survey.¹²

Ninety-seven (8%) of the 1,264 responding organizations said they produce more than one outdoor arts festival at the present time. Of those, most (81%) produce two festivals, but 6% said they produce four or more outdoor arts festivals.

Eighty-eight percent (88%) of festivals in the national survey occur from May through August; July is the most common month (see Figure 2). Three-fourths of festivals (76%) last one to three days,¹³ and 95% occur once a year.

II. CASE STUDIES

In addition to the national survey, seven case studies were conducted to showcase the range and diversity of events that make up “arts festivals” and to explore

Figure 1. Geographic Distribution of Festivals in the Survey

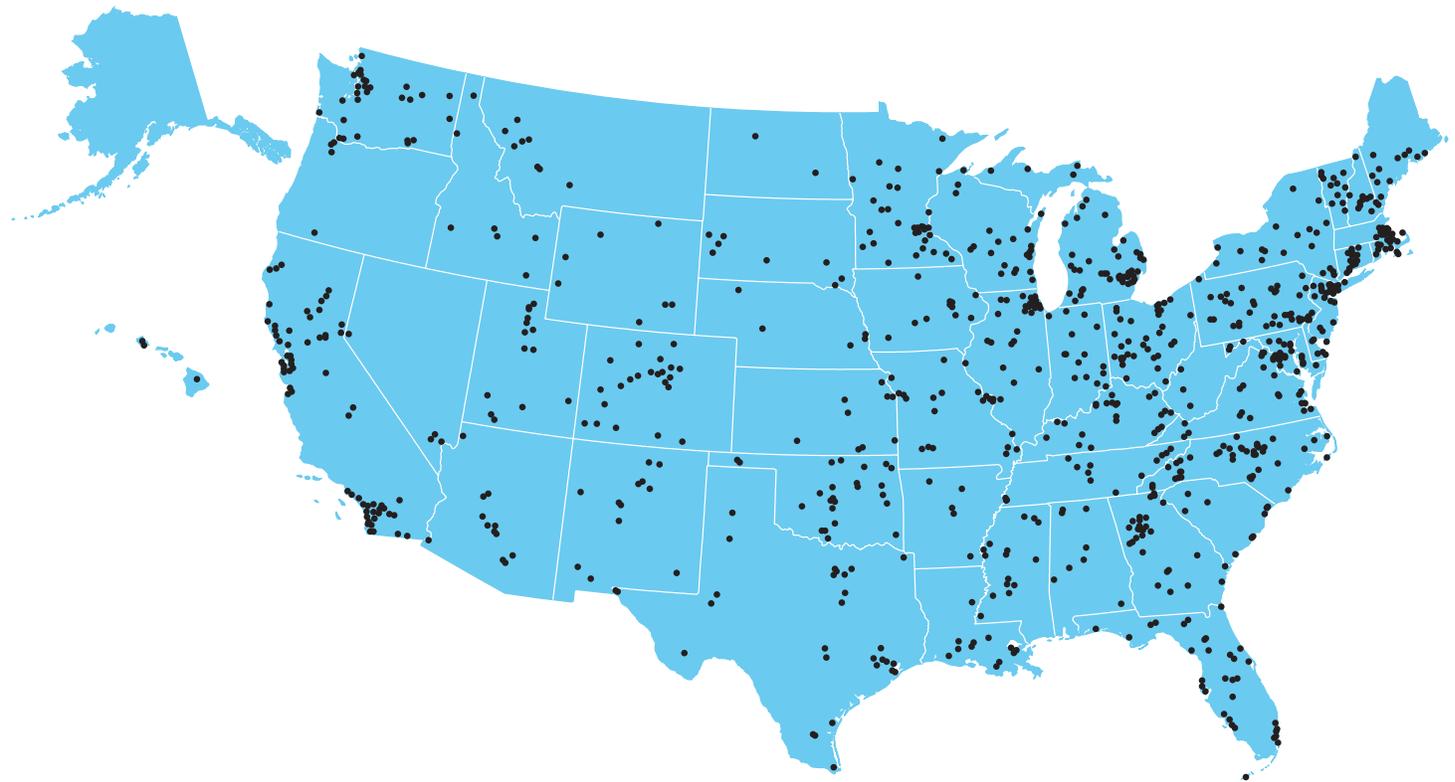
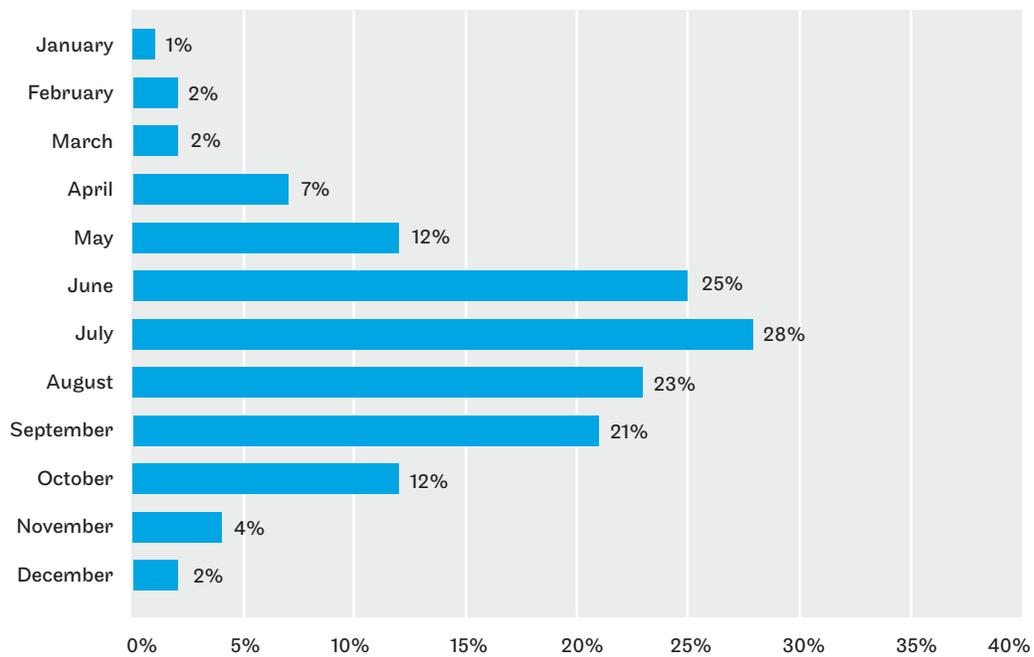


Figure 2. Percent of Festivals, by Month(s) in Which They Occurred
(Respondents Could Name More than One Month)



organizational structure, how festivals function, audience patterns, and festivals' relationships with and impact on the local community. The following festivals were chosen as case study sites:

1. Houston International Festival, Houston, Texas, April 25–26, 2009
2. Piccolo Spoleto Festival, Charleston, South Carolina, May 22–24, 2009
3. Lowell Folk Festival, Lowell, Massachusetts, July 25–26, 2009
4. Santa Fe Indian Market, Santa Fe, New Mexico, August 22–23, 2009
5. Chicago Jazz Festival, Chicago, Illinois, September 5–6, 2009
6. Tamejavi Festival, Fresno, California, September 19–20, 2009
7. D.U.M.B.O. Art Under the Bridge Festival, Brooklyn, New York, September 26–27, 2009

The research team spent one to two days on-site at each festival collecting quantitative and qualitative data about audiences at the festival, the participating artists, the festival's operations, and the festival's engagement with its surrounding community. At each case study site, in-depth interviews were conducted with the festival administrator; focus group discussions occurred with festival artists and volunteers; and two surveys were given to festival attendees.

Case study sites were selected to provide diversity across the following dimensions: geography, governance structure, entrance fee, mission, and arts discipline. The seven sites span the six U.S. regions of the regional arts organizations: Arts Midwest (IA, IL, IN, MI, MN, ND, OH, SD, WI), Mid-America Arts Alliance (AR, KS, MO, NE, OK, TX), Mid Atlantic Arts Foundation (DC, DE, MD, NJ, NY, PA, VA, VI, WV), New England Foundation for the Arts (CT, MA, ME, NH, RI, VT), South Arts (AL, FL, GA, KY, LA, MS, NC, SC, TN), and Western States Arts Federation (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY). Festivals also must have been in existence for at least five years and demonstrated the capacity to support the kind of research undertaken for this project.

Details about the case study selection criteria and research instruments appear in the Research Methodology section beginning on page 67. Table 1 on the following page shows the range of characteristics represented by the sample of case study festivals.

Due to the selection criteria applied and the limited number of sites chosen, the case studies throughout this report cannot be viewed as mirroring the larger, national survey results. Rather, the case study findings included throughout this report are intended to

contextualize and enhance the reader's understanding of the main survey findings. However, where the case study findings do resemble the national survey results, the fact has been noted.

Notes

⁹ The Survey of Public Participation in the Arts is the nation's largest and most representative periodic study of adult participation in arts events and activities. It is conducted by the NEA in partnership with the U.S. Census Bureau. The full summary report is available at http://www.nea.gov/research/ResearchReports_chrono.html.

¹⁰ Festival organizers (i.e. individuals involved in producing the events) completed the survey on the festival(s) they produced.

¹¹ Survey respondents were contacted by postal and electronic mail and requested to participate in the survey. A full discussion of the research methodology begins on page 67.

¹² Three Alaskan festivals responded to the national survey; however, none of them qualified to participate, as only 1–24% of their events are held outdoors. As noted above, only festivals that had at least 50% of their events outdoors were allowed to take the survey.

¹³ When festivals lasted more than one day, the days typically were consecutive.

Table 1. Overview of Case Study Festival Characteristics

	Houston International Festival	Piccolo Spoleto	Lowell Folk Festival	Santa Fe Indian Market	Chicago Jazz Festival	Tamejavi Festival	D.U.M.B.O. Art Under the Bridge Festival
Organizational Form*	501(c)3	501(c)3 - privatized public agency	Public-private partnership	501(c)3	Public-private partnership	501(c)3 association of religious organizations	501(c)3 - collaboration with corporate partner
Festival Budget Size (2007)	\$3 million	\$2.5 million	\$1.3 million	\$1.1 million	\$680,000	\$603,000	\$132,000
Audience Size	425,000	250,000	200,000	100,000	300,000	1,000	100,000
Pricing*	Ticketed for adults 13 and over (\$15)	Free and ticketed events (\$10-\$15)	Free	Free and ticketed events (\$15)	Free	Free	Free
Geography* (NEA Region)	Mid-America	South	New England	West	Mid-West	West	Mid Atlantic
Primary Arts Discipline*	Music	Multi-disciplinary	Music	Visual Arts	Music	Multi-disciplinary	Visual Arts

*Festival characteristics that were explicitly part of the case study selection criteria. Diversity was sought across these dimensions.



The Filene Center at Wolf Trap National Park for the Performing Arts in Virginia.
Photo by Robert Llewellyn

The Pan-Valley Institute was founded with the mission of providing opportunities for immigrants to get skills to learn how to be more civically engaged. In our other programs, we saw how much importance our clients gave to their cultural lives. And there were not too many opportunities to express that. By providing these opportunities for cultural expression, we could also provide opportunities for engagement—what we call cultural organizing. Our principles allow our participants to guide the process of their own organizing. We always allow the space for sharing stories. This was really important for bringing people together. We work with immigrants. Even though they all are immigrants, they are so diverse and have different statuses—refugees and so on. To share cultural practices brings out their similarities. We saw that this works. It has been very effective in building interethnic relationships and providing opportunities for immigrants to build skills.

— Festival administrator

Section 1

Range of Festival Types, by Program and Mission

Outdoor arts festivals are diverse in nature, content, and purpose. No one festival type describes the majority of festivals, nor is there a common mission that drives all festivals. A variety of arts disciplines are on display; and festivals range in terms of the number of exhibiting and performing artists engaged and the number of events scheduled.

I. THE NATIONAL SURVEY

A wide variety of festivals met the study’s screening criteria for constituting an “outdoor arts festival” (see page 67 for details on the criteria). They ranged from a swinging-bridge festival to an ice festival to a fish festival. All reported that arts and/or culture programming are a core part of the festival’s activities and that at least half the events are held outdoors.

Festival Type

Respondents identified their festival type by choosing the “one best description” from a list of 27 types. See Table 2 for the event types festival organizers could choose from. The most commonly reported types of outdoor arts festivals in the survey were music (22%), arts and crafts (19%), and multidisciplinary (14%), although many other festival types also were represented.

As Figure 3 shows, 8% of festivals were unable to find a single best description and wrote in a description under “other.” The most common “other” type of festival was fine arts, followed by folk arts, environmental, and cultural. The pie wedge labeled “else” refers to a combined 12% of festivals that chose a description named by 2% of respondents or fewer. These categories included historical, holiday, and charity festivals.

Diversity in Programming

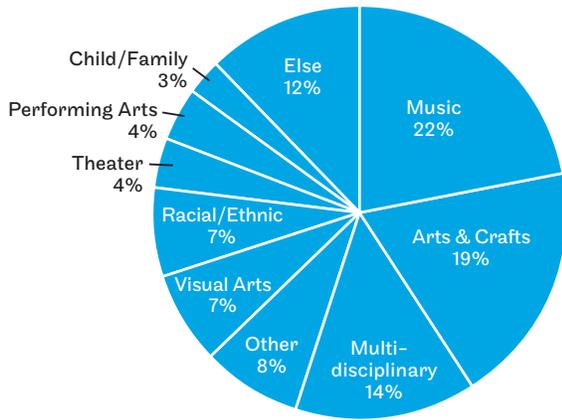
Another survey question asked festival organizers to identify the artistic disciplines represented by the festival’s programming—regardless of how the organizers described their festival type. Across the many kinds of festivals, music played a significant role: 81% of all outdoor arts festivals have a music component (see Figure 4). Festivals that do not host music events are typically visual arts, including arts and crafts or theater festivals. Visual arts and crafts-related activities are also fundamental to many outdoor arts festivals, appearing in 67% of festivals in the survey.

Figure 4 shows in greater detail the different kinds of events making up a festival. Respondents marked all the answers that applied.

Table 2. Festival Types Listed on Survey Questionnaire

Multidisciplinary	Education	Mardi Gras
Anniversary or Commemorative	Festival Linked to an Official Holiday	Mummers Festival
Arts and Crafts	Film	Music
Bazaar	Food Festival	Performing Arts
Carnival	Fringe	Racial/Ethnic Heritage
Charity Event	Historical Theme (e.g., Renaissance)	Religious
Children/Family	International	Theater
Community Networking	Literary	Visual Arts
County Fair/State Fair		Other: _____
Dance		

Figure 3. Percent Distribution of Festivals, by Organizer’s Report of Festival Type



“Other” refers to write-in answers by respondents who did not choose a festival type from the list provided. “Else” refers to infrequent choices (selected by 2% or less) from the list of festival types provided to respondents.

Artists and Performances

The number of artists and performances varies widely across festivals and is correlated¹⁴ with the size of the festival audience; the larger the festival audience, the more artists and performances.

More than half the festivals (58%) have fewer than 100 performers;¹⁵ 43% have 100 or more (see Figure 5). Arts and crafts are more likely to have more than 100 performers or exhibitors and music festivals are more likely to have fewer than 100 performers or exhibitors.

A third (33%) of festivals have a total of one to nine scheduled performances, and 25% have 10 to 19 (see Figure 6). Figure 6 shows that only 2% of all outdoor

arts festivals have no scheduled performances.¹⁶ These festivals are mostly arts and crafts-focused.

Diversity of Mission

The survey questionnaire concluded with an open-ended prompt about the festival’s mission, and respondents described their festival’s purpose with enthusiasm and passion. While festivals exist for a variety of reasons and purposes, respondents commonly said the festival is an opportunity to showcase their community, give the public the gift of art and culture, and promote cultural understanding, appreciation, and acceptance.

The following are excerpts from respondents’ answers to the question, “Why was your festival founded, what is your organization’s purpose for holding the festival, or what is the benefit the festival brings to the community?”

- *To honor our local jazz musicians and to expose our underserved area to excellent music and professional jazz.*
- *To bring the world’s finest artists to an appreciative crowd of all ages representing a broad spectrum of culturally relevant music, dance, art, film, and theater. Our belief is exposure to great art helps cross-cultural understanding and acceptance/celebration of differences.*
- *Our festival keeps the soul of our community alive. Our cotton mill closed in 1969 and our organization’s mission is to keep alive the traditions, values, history, and heritage of our ancestors. The festival serves as a reunion for the “old-timers” and a way for new people to be adopted as neighbors. Each year there is a “theme,” some aspect of the rich legacy we try to pass on.*
- *The mission is to provide a gathering place at the annual festival for people of different cultures, races,*

Figure 4. Percent of Festivals, by Artistic Disciplines Represented (Percent of Festivals Naming the Discipline) (multiple answers allowed)

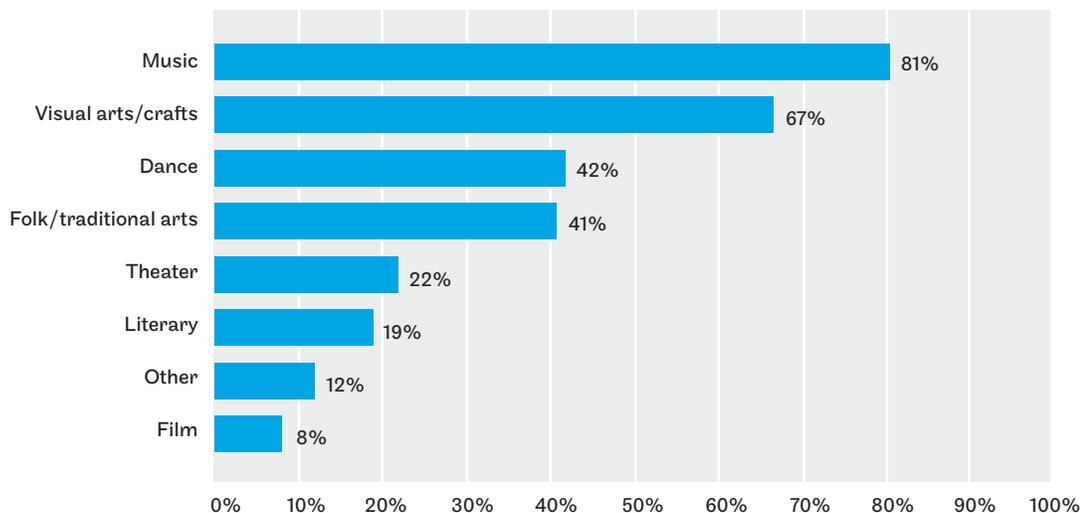


Figure 5. Percent of Festivals, by Number of Exhibiting or Performing Artists

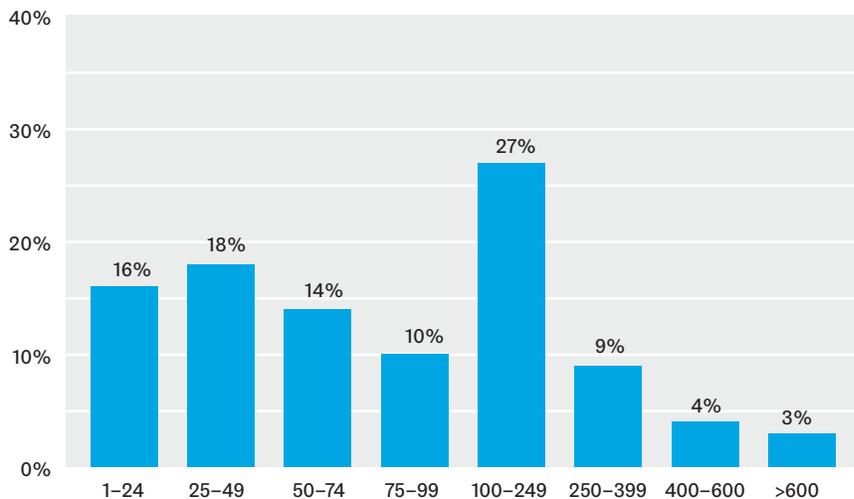
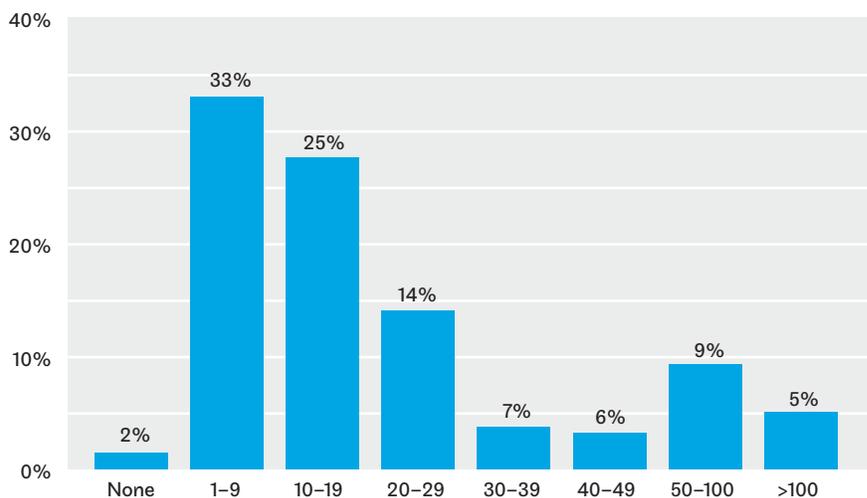


Figure 6. Percent of Festivals, by Total Number of Scheduled Performances



ethnicities, and religions. It is an anticipated family homecoming event where people of many cultures and races come together in a relaxed, family atmosphere and celebrate cultural diversity on a personal basis. The festival allows people to display their own cultural background and learn about others, experience music and dance of different cultures, taste and enjoy the food, and learn cultural traditions from our area and other parts of the world. We introduce new performing artists from other cultural groups and serve as a resource to organizations and individuals who want to promote awareness with smaller cultural gatherings.

- . . . founded to expose the public to the genre of music known as Blues. It is an opportunity to promote our town, which is a unique place that we feel will become a destination for event attendees. The event also allows

local artists to be featured along with regional and national touring acts displaying their talents.

- *We provide this festival as a means of demonstrating to the audience arts that have been handed down from generation to generation. . . We focus on [local] artisans that produce works that reflect on [our local] heritage.*

II. THE CASE STUDY SITES

The case studies, chosen to represent the diversity of the nation's outdoor arts festivals, provided an in-depth look at the breadth of discipline and missions observed in the national study.

Diversity in Programming

As the national survey of festivals demonstrated, festivals include a variety of disciplines—music and visual arts and crafts in particular. The case studies support this finding. The Houston International Festival (iFest) presents music, dance, visual arts, cuisine, heritage, and educational programming focusing on a country or culture. Piccolo Spoleto has seven main categories of programming: children and family events, dance, film and literary arts, music, special events, theater, and visual arts. Lowell Folk Festival is a celebration of music, visual arts, and ethnic food. Santa Fe Indian Market emphasizes traditional Native-American art forms such as jewelry, pottery, and textiles, and, recently, painting, sculpture, and newer styles and techniques. Chicago Jazz Festival focuses on jazz but includes a number of educational opportunities for the audience and community. Tamejavi Festival has several program components, such as artistic presentations, films, poetry readings, an outdoor marketplace, and events for children and families. The artistic presentations vary but include theater, dance, music, multimedia, and storytelling. D.U.M.B.O. Art Under the Bridge Festival showcases peer-reviewed contemporary works and installations ranging from paintings to printmaking, tapestry, film, and video art.

Diversity of Mission

The core purpose of the case study festivals is a celebration of the arts, but the festivals differ in the details, including the specific kind of art being celebrated. Houston's iFest promotes diversity and educates attendees about diverse cultures through arts, cultural, and educational programming. Piccolo Spoleto's mission is to give access to the larger Spoleto USA Festival¹⁷ for everyone, regardless of their economic, social, or physical circumstances, and to provide an opportunity for local and regional artists, writers, and performers to appear in Piccolo's local venue. The Lowell Folk Festival is billed by organizers as the largest free music festival in the United States, drawing hundreds of thousands of people from the local area, the country, and beyond. Santa Fe Indian Market is one of the world's preeminent venues for seeing and purchasing Native-American art. Indian Market provides opportunities to meet contemporary Native-American artists and to learn about Native-American cultures. Central to the mission of the Chicago Jazz Festival is celebrating and honoring the history of jazz in the city. Festival organizers reach out to potential attendees who have limited exposure to jazz music; the organizers hope to educate and build a broader audience for the genre. The Tamejavi Festival's mission is threefold: to offer a medium through which immigrants express themselves and voice their ideas; to build new relationships

and understanding among immigrants and long-standing residents of the Central Valley near Fresno; and to open a public space that enhances expressions of creativity to stimulate a sense of belonging and promote civic participation. D.U.M.B.O. Art Under the Bridge Festival celebrates fringe culture in the visual arts and calls itself "the largest urban forum for experimental art in the United States."

Notes

¹⁴ Correlation is $r=.6$, which indicates a moderately strong correlation between number of artists and performances and size of festival audience.

¹⁵ A performer is anyone who is performing or displaying at the festival. Survey respondents were instructed to give the combined number of artists who perform during the season. For a group performance, such as a symphony, each artist in the group was counted. Multiple appearances by the same artist were counted only once.

¹⁶ The questionnaire asked respondents to "include performances such as concerts, plays, and dance performances but do not include unscheduled performances. Count a double-bill as two performances."

¹⁷ Spoleto Festival USA, founded in 1977 by composer Gian Carlo Menotti, describes itself as one of the world's premier performing arts festivals. Each year, world-renowned artists, American premieres, and new commissions are presented at the 17-day long festival. The mission of Spoleto Festival USA is to create a comprehensive and innovative arts festival in Charleston, South Carolina. The festival produces and presents events featuring an international mix of distinguished artists and emerging talent.



Sean Capone's *Camera Rosetum*, 2009, displayed at the 13th Annual D.U.M.B.O. Art Under the Bridge Festival in Brooklyn, New York. Photo by Oleg Lugovskoy Jr.

We open the door to the City of Lowell, to the downtown. It's not just about hearing the mariachi, it's about seeing architecture, the food you're eating, the whole experience. The festival is so layered. It is a chance to hear and listen to music that I would never have listened to otherwise and be able to speak with artists and learn about their craft and see kids being hands-on and eat the food and listen to music at the same time. It is so layered that you can expose yourself to many different kinds of art. One of the other things that the festival does is that it gives people access to the local artists who are here. We have lots of smokestacks in Lowell and we have a visual artist who lights the smokestacks. All kinds of creativity are released when people see these artistic activities.

— Festival board member

Section 2

Public Access to Festivals

A defining characteristic of outdoor arts festivals is their accessibility for the public. The majority of festivals have free admission. Of the admission-charging festivals, most charge less than \$20 per ticket and have a reduced-fee program. Festivals are often held in public venues, such as plazas and parks, and occur in communities of all sizes, from large cities to small towns.

I. NATIONAL SURVEY RESULTS

Ticketing

Most festivals are priced to make them affordable; many are free. Over half of the festivals (59%) offer free admission, and another 17% charge only for select events (see Figure 7). For 8% of festivals, organizers described the pricing structure as “other:” something they believed was other than free, and yet not quite free. Such responses included: “The festival is free to attend but there’s a \$6 charge to enter the festival gardens;” “the general public pays for admission, but students and teachers get in for free on set days;” “this is a camp, and students pay tuition;” and “we recommend a donation of \$5.”

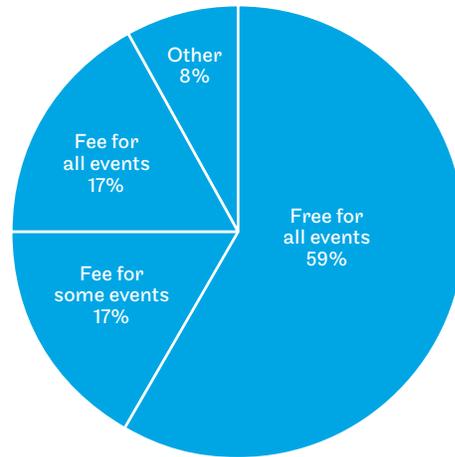
Of all festivals that charge an admission fee for some or all events (34% of festivals), 56% charge less than \$15 per ticket and 68% charge below \$20 (Figure 8). Only 24 festivals in the national survey charge \$50 or more per ticket, 71% of which are music festivals.

Most festivals that charge \$5 or more for admission have a reduced fee program. As Figure 9 shows, 75% of festivals that ordinarily charge admission have a formal program to distribute free tickets or tickets at a reduced price.

Venue

Outdoor arts festivals are held in locations accessible to the public. The most common venue is a public plaza or park: 46% of all festival held some or all of their events there, and 25% held some or all of their events in a street. About a third of festivals are held in more than one venue; conversely, two-thirds take place in one venue only. Figure 10 shows the full list of venues where outdoor arts festivals occur, ranging from restaurants to museums to concert halls. Eighteen per-

Figure 7. Percent of Festivals, by Admission Fee Structure



cent (18%) of festivals occur in “other” locations, venues not found in the choices provided in the survey. Those additional venues included the parking lot of a shopping center, a bank parking lot, a horse racetrack, an ice arena, artist studios, and a municipal airport.

Community Size

Outdoor arts festivals are not just the domain of large cities. In big cities and small towns alike, Americans have access to festivals. Only 17% of festivals take place in cities with a population of 500,000 or more; 77% occur in towns with fewer than 250,000 residents and 30% in towns with fewer than 10,000.

II. CASE STUDY RESULTS

The case study results support the national survey findings that outdoor arts festivals are widely accessible to the public, with few barriers to attendance.

Ticketing

Six of the seven case study festivals offer free admission; only the Houston International Festival charges an admission fee for all events,¹⁸ and through the Target Foundation, iFest provides free admission to all children who are 12 years old and younger. Most of Piccolo Spoleto’s programs are free, but some events are ticketed and cost \$10–\$15. Piccolo Spoleto, which includes

Figure 8. Percent of Festivals That Charge for Admission, by Average Fee

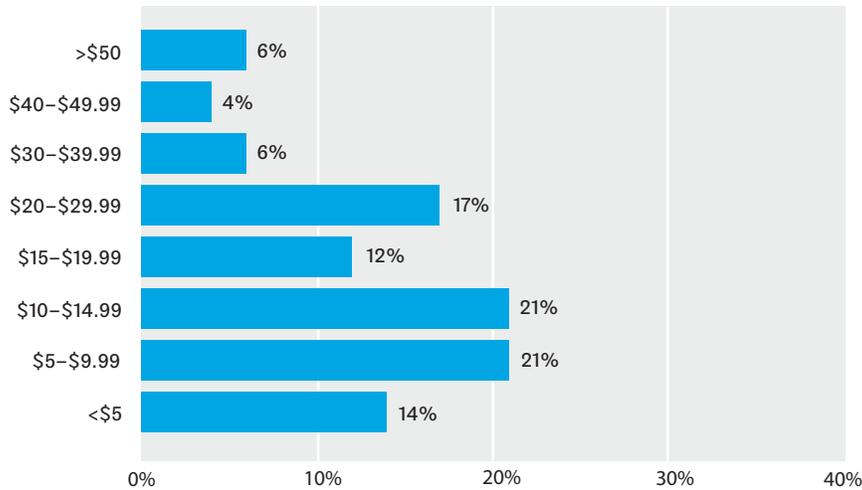
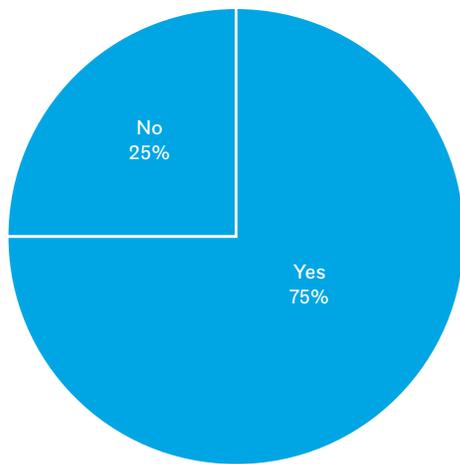


Figure 9. Percent of Festivals That Charge an Admission with a Discount Ticketing Program



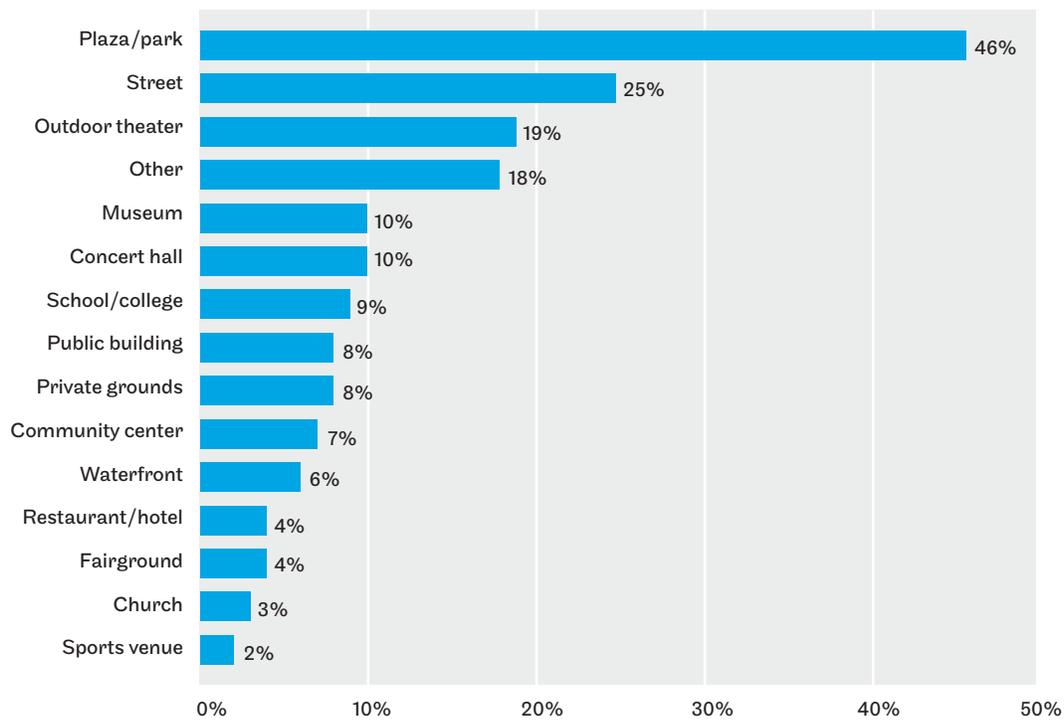
an extensive array of ticketed programs in addition to its free programming, gives away unsold tickets to increase accessibility and boost audience size.

Income information was collected as part of the case study research (but not the national survey). It showed that Houston's International Festival, despite charging for admission, draws an audience whose self-reported income is quite similar to the Houston Metropolitan Statistical Area (MSA) as a whole.¹⁹ This means that even with an entrance fee, a broad cross-section of the public is able to attend.

Community Size²⁰

Three of the case study festivals occur in relatively small communities: Santa Fe, New Mexico, the home of Santa Fe Indian Market, has a population of about 72,000 people; Lowell, Massachusetts, home of the Lowell Folk Festival, is a town of 100,000; and Piccolo Spoleto is in Charleston, South Carolina, with a population of 111,000. In contrast, the Houston International Festival is in Houston, Texas (population 2.2 million); D.U.M.B.O. Arts Under the Bridge is in Brooklyn, New York (population 2.5 million²¹); and Chicago Jazz Festival is in a city with a population of 2.8 million. Fresno, California, the home of the Tamejavi Festival, is somewhere between large and small, with a population of about 500,000.

Figure 10. Percent of Festivals, by Venue During Most Recent Season
(multiple answers allowed)



Notes

¹⁸ Admission was \$15 in 2009.

¹⁹ 73% of survey respondents at iFest reported household income of \$100,000 or less compared to 74% of the population of the Houston MSA.

²⁰ Community size was a consideration when selecting which festivals to use as case studies—the team strived to include festivals that were in both smaller and larger communities.

²¹ This is the population for Kings County. Brooklyn is not technically a city; New York City’s population in 2009 was 8.4 million.



City Parks Foundations' free kids arts programs introduce New York City youth to dance, music, storytelling, puppetry, and much more. Photo courtesy of City Parks Foundation

These contexts can be really freeing. That element of risk and really pushing yourself is always there [in jazz], but when the group is loose, when the group is playing a lot, when you get that energy and that excitement from the city, that can take you somewhere else. The excitement of this music is that you don't always know where it's going. If you're in that moment and you have the energy and excitement of a great venue, it can inspire you to go to another place. It inspires you to take some risks, you hear it go to somewhere else and you just go with it. In venues like this, that's what people want to hear and that's what artists want to do. You've got 10,000 people saying "yeah," really pushing you along.

— Festival artist

Section 3

A Multi-Dimensional Arts Experience

Festivals offer participants a richly textured arts experience. Audiences can see an array of high-quality events in different art forms, some of which may be new and unfamiliar to them. The informal nature and outdoor setting of festivals allow audiences to come and go as they please. In this respect, festivals can be more family-friendly than traditional arts venues, providing a singular aesthetic experience for audiences and artists alike. Finally, festivals engender greater interaction between audiences and artists.

I. NATIONAL SURVEY RESULTS

Diversity of Disciplines

According to the national survey, the typical outdoor arts festival is a composite of many different disciplines, offering festival-goers a variety of artistic experiences in one setting.

“What is exciting is that there is a lot of cross-pollination because there are all these different disciplines together. There’s a real fueling that goes on.”

– Festival artist

As discussed in Section 1, music plays a significant role in all festivals, regardless of the festival type. Visual arts and crafts are also a component of most festivals.

Table 3 shows the kinds of events that typically make up festivals of different categories, according to the national survey. For example, it shows that 18% of the events at a typical racial and ethnic festival are dance

Table 3. Percent Distribution of Events at Festivals, by Organizer’s Description of Festival Type

Self-Reported Festival Type	Type of Events Featured								
	Dance	Film	Folk/ Traditional Arts	Literary	Music	Theater	Visual Arts/Arts & Crafts	Other	
ALL festivals (n=1,376)	7%	1%	9%	3%	39%	6%	32%	3%	100%
Music festivals (n=309)	3%	<1%	4%	1%	87%	<1%	4%	<1%	100%
Arts & crafts festivals (n=255)	2%	<1%	8%	<1%	12%	<1%	77%	<1%	100%
Multidisciplinary festivals (n=188)	10%	3%	8%	4%	36%	5%	31%	4%	100%
Racial/ethnic festivals (n=97)	18%	<1%	24%	2%	37%	1%	13%	3%	100%
Visual arts festivals (n=95)	2%	<1%	2%	<1%	11%	1%	81%	2%	100%
Theater festivals (n=52)	2%	0%	<1%	1%	5%	91%	0%	0%	100%
Performing arts festivals (n=47)	9%	<1%	10%	8%	43%	14%	7%	9%	100%
Child/family festivals (n=43)	12%	3%	14%	4%	38%	4%	23%	2%	100%

Figure 11. Percent of Festivals with an Artistic Staff, Staff Person, or Volunteer Whose Primary Role Is Arts Curator or Arts Event Programmer

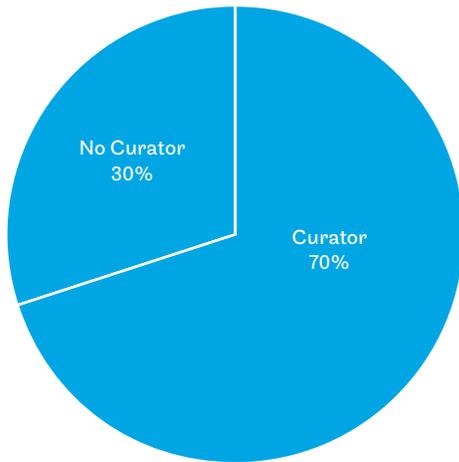
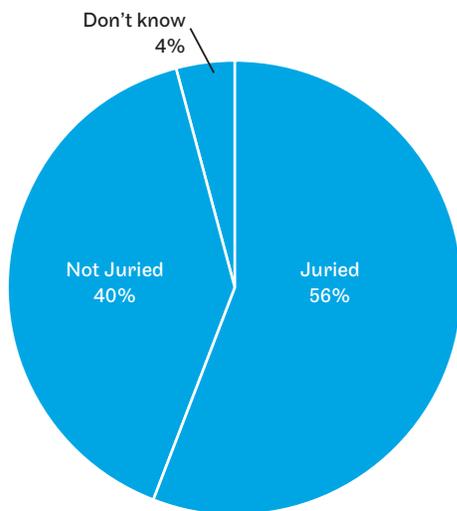


Figure 12. Percent of Self-identified Visual Arts Festivals That Are Juried



events, 24% are folk and traditional arts, 37% are music, and 13% are visual arts. Therefore, although only 14% of festivals are described by survey respondents as “multidisciplinary,” (see Section 1), most festivals clearly involve many arts disciplines.

Commitment to Quality Arts Experiences

Outdoor arts festivals demonstrate commitment to the delivery of high-quality art. Seventy percent (70%) of festivals in the national survey have an arts curator or arts event programmer (see Figure 11); among visual arts festivals, over half (56%) say their arts are juried (Figure 12).

Additionally, most festivals offer arts education opportunities. Almost two-thirds (64%) of the survey

participants said their festival offers formal educational activities or programming, such as lectures, artist demonstrations, and classes. See Section 5 for additional information.

II. CASE STUDY RESULTS

Outdoor arts festivals, according to case study focus groups and personal interviews, differ significantly from other types of arts venues or events in several ways. They:

- promote a diversity of disciplines and styles, including programs that span the performing and visual arts; classical, avant-garde, experimental, and commercial styles; high art; and more popular forms;
- create a relaxed, informal setting that is particularly friendly to families with young children and to people who are not regular attenders at arts events in more formal venues; and
- provide a distinctive aesthetic context for performing, exhibiting, and experiencing artistic work.

Diversity of Disciplines

Case study participants said these features work together to create a special and distinctive opportunity to expose audiences to unfamiliar artistic forms and styles. Many described this capability as one of the most valuable things about festivals. Festival administrators said they purposely program “big draw” art forms and artists in conjunction with lesser-known forms and artists to introduce audiences to new kinds of work.

Informal and Aesthetically Pleasing Setting

The less formal festival setting allows audience members to stroll in and out of programs and experience new, unfamiliar forms of art without committing in advance to them. Respondents suggested that the ability to enter and leave programs with ease is particularly important for families with young children. As a result of the outdoor arts festival experience, many audience members in the case studies reported an increased interest in trying new kinds of arts events.

“The artists are so generous. This is totally different from seeing a performance in any other venue. They want kids and people to come up on the stage. They want people to be a part of what they are doing here....”

– Festival volunteer

Artists in the focus groups commented on the festivals' special aesthetic context for performing and exhibiting artwork. Many said they find the natural setting of festivals inspiring, one that they claimed is fun, informal, and in support of experimentation.

Interaction between Artists and Audience

The casual festival environment also facilitates interactions and relationship-building among artists and allows audience members a unique opportunity to interact with them. During focus groups, local artists said the opportunity to work alongside and exchange ideas with highly accomplished visiting artists is an important reason they participate in festivals.

Artists said outdoor arts festivals provide a context where the barrier between artist and audience is more permeable than in other venues. In focus groups, they described how audiences perceive that artists are approachable in an outdoor setting and ask questions of all kinds about the artists' work. Many said that having children in the audience is critical to creating this atmosphere of openness and questioning. The artists also suggested that because they often visit festivals for relatively extended periods, they are available to audiences and the community in valuable ways. For example, immigrant artists often spend significant time during the festival in local immigrant communities by visiting heritage organizations, language schools, churches, or extended family.



The 71st National Folk Festival in Butte, Montana. Photo by Walter Hinick, courtesy of the National Council for the Traditional Arts

This is who we are. Every year when I come to the festival I want to say, 'City of Houston, look around you, this is who we are.' This is no man's land: not your neighborhood, not your church, not your work. We all came here for the same reason, to enjoy what these artists have brought to us. No one's going to judge you. It is okay to be nice to each other here. We spend most of our time in our air-conditioned cars going to our air-conditioned houses. We don't spend all that much time out in the park standing with our neighbors, standing with our friends.

– Festival volunteer

Section 4

Composition of Festival Audiences

Festivals are not uniform in size, and they differ from other, more formal arts venues and events in terms of audience background. Audiences for festivals in the survey ranged from fewer than 1,000 people to 500,000 or more. Audience characteristics were similarly diverse and, on average, comparable to the demographic profile of the U.S. population.

I. THE NATIONAL SURVEY RESULTS

The national survey asked respondents to describe their audience during the festival's most recent sea-

son.²² Questions addressed a variety of topics ranging from size of audience to its demographic composition, including age, race and ethnicity, and income level. The gender makeup of the audiences at the festivals in the survey is equivalent to that of audiences at benchmark arts activities²³ (both are 55% female), according to the NEA's 2008 SPPA. The racial and ethnic composition, however, differs somewhat from 2008 SPPA findings:²⁴ the festivals in the national festival survey had a higher proportion of Hispanic and African-American attendees and a lower proportion of white attendees than SPPA benchmark arts audiences.²⁵ It should be noted that the SPPA, a general population survey, measures

Figure 13. Percent of Festivals, by Number of Attenders in the Most Recent Season

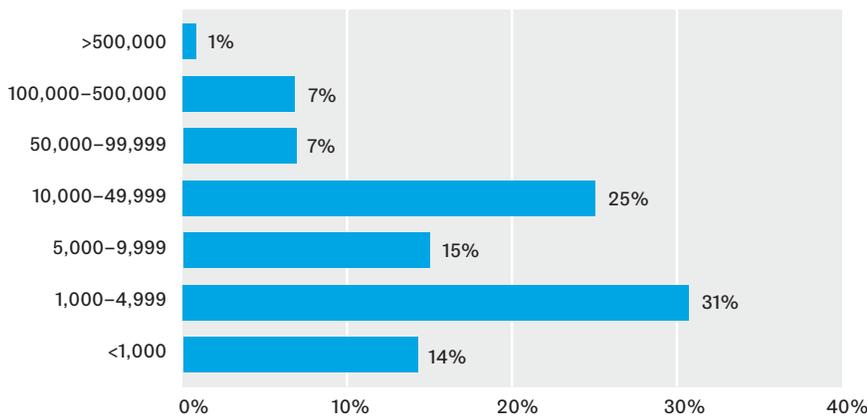
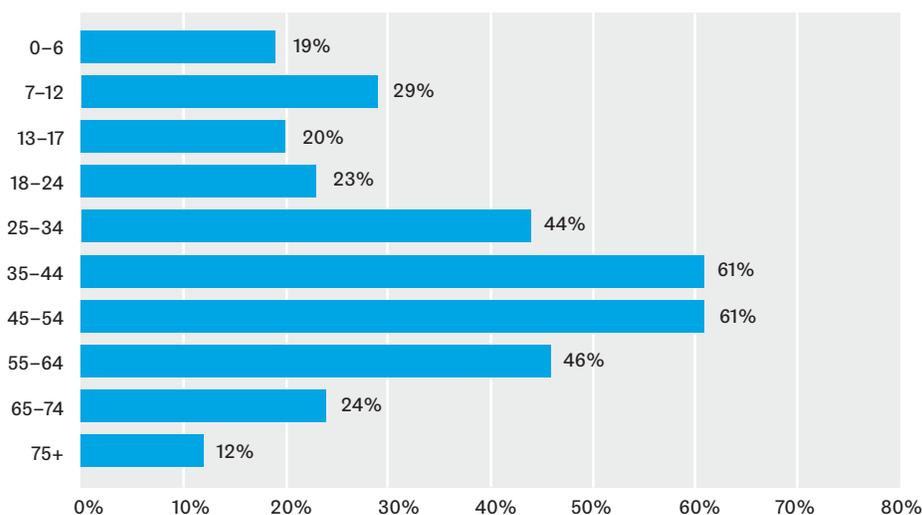


Figure 14. Percent of Festivals, by Most Common Age Group Represented in Audience (multiple answers allowed)



only adult (18 years and over) attendees, whereas all age groups are included in the festival audience estimates from the national festival survey.

Audience Size

The size of the festival audiences varies widely and is not a function of the self-reported festival type. Music festivals,²⁶ for instance, are about the same size as other kinds of festivals. Arts and crafts and theater festivals draw a slightly larger audience than others.

Overall, 45% of the festivals in the national survey reported an audience of fewer than 5,000 people, and 60% reported an audience of fewer than 10,000. Not surprisingly, most of the festivals drawing fewer than 1,000 people were held in small towns, and the largest festivals, attracting over a half-million people, were in urban areas such as Chicago, Los Angeles, Washington, D.C., Detroit, and San Diego.

Audience Demographics

The typical audience of an outdoor arts festival is 35–54 years of age, slightly more female than male, and non-Hispanic Caucasian (see Figure 14 and Table 4). The gender, ethnic, and racial composition is fairly similar to national census figures for the U.S. population and benchmark arts audiences reported in the 2008 SPPA, although some differences exist. First, arts audiences—according to both the national festival survey reported here and the 2008 SPPA—have disproportionately more females than males (55% of these audiences are

female, compared with 51% of the U.S. population). Second, while the present study found that the percentage of African Americans attending outdoor arts festivals (16%) is similar to their proportion in the U.S. population (13%), the SPPA reported that disproportionately fewer African Americans attend benchmark arts events (7%). This finding also holds true for the Hispanic population: the present study found that the percentage of Hispanics attending outdoor arts festivals is similar to that in the U.S. population (15% versus 16%), but according to the SPPA, disproportionately fewer Hispanics attend benchmark arts events (8%).²⁷ (Age comparisons could not be made because of limitations on the age data for festival audiences.²⁸)

II. CASE STUDY RESULTS

Unlike the examples discussed above, where festival organizers reported the demographic characteristics of their festival audiences, the case study findings that are discussed below are drawn from surveys in which individual respondents reported on their own demographic characteristics.

Audience Size

The size of the case study festival audiences ranged from 1,000 (Tamejavi Festival) to 425,000 (Houston International Festival), though the majority of the festivals were in the 100,000 to 300,000 range. Santa Fe Indian Market and D.U.M.B.O. Art Under the Bridge

Table 4. Demographic Make-Up of Festival Audiences, as Reported by Festival Organizers, in Comparison with U.S. Census and SPPA Figures

	Percent of Festival Audiences, by Demographic Group (2009 Festival Survey)	Percent of U.S. Population, by Demographic Group (2008 U.S. Census)	Percent of Audiences at NEA Benchmark Arts Activities, by Demographic Group (2008 SPPA)
Gender			
Male	45%	49%	45%
Female	55%	51%	55%
	100%	100%	100%
Ethnicity			
Hispanic	15%	16%	8%
Non-Hispanic	85%	84%	92%
	100%	100%	100%
Race			
White	73%	80%	86%
Black/African American	16%	13%	7%
Asian	6%	5%	4%
American Indian/Alaska Native	4%	1%	<1%
Hawaiian/Pacific Islander	2%	<1%	<1%
Other*	n/a	2%	1%
	100%	100%	100%

* Two or more races

Festival both had 100,000 attenders. Lowell Folk Festival and Piccolo Spoleto had audiences of 200,000 and 250,000, respectively, while Chicago Jazz Festival had 300,000 attenders.

Audience Demographics²⁹

Similar to benchmark arts audiences described in the 2008 SPPA, audiences at the seven case study sites are more often female than male and markedly better-educated and higher income earners than the general population. The case study audiences differed from the benchmark arts audience in terms of age of attenders: three case study sites—iFest, Tamejavi Festival, and D.U.M.B.O. Art Under the Bridge Festival—had markedly younger audiences than the national arts audiences, which have a median age of 44 years.

Additionally, unlike the benchmark arts audience identified by the 2008 SPPA, the racial and ethnic makeup of audiences at the seven case sites is similar to that of the U.S. population.³⁰ This pattern is unusual; benchmark arts audiences per the 2008 SPPA draw an audience less racially and ethnically diverse than the U.S. population. Demographic similarity between audiences and the U.S. population is rare among the arts activities tracked by the SPPA. (The only exceptions are African-American attendance at jazz performances, Hispanic attendance at Latin music performances, and Asian-American attendance at art museums.) The educational level of African Americans and Hispanics who attended the seven case study festivals is proportionately higher than that of African Americans and Hispanics in the general population. This finding holds especially for African Americans.

When looking across the seven case study sites, it is evident that each festival draws a diverse array of attenders, and the audiences at each case study festival vary in notable ways from each other. iFest, for example, draws an audience that is 20% Hispanic and 30% African American, whereas the Lowell Folk Festival attracts a crowd that is about 2% African American. Interestingly, whereas more females than males (55% vs. 45%) attended festivals in the national festival survey and in five of the seven case study festivals, the proportion of men at the Tamejavi Festival and Chicago Jazz Festival was similar to that in the U.S. population (52% for both festivals versus 51% in the U.S. population).

Arts Engagement of Audiences

The case studies also suggest that people who attend outdoor arts festivals are significantly more involved in the arts, either as observers or as active participants, than the U.S. population in general. Over 50% of Lowell's audience, 63% of the Chicago Jazz Fest audience, and 75% of Piccolo Spoleto's, for example, reported having attended a live orchestra performance in the past

12 months, compared with 9% of U.S. adults, according to the 2008 SPPA.³¹ The case study audiences are also more engaged in creative activity than the population in general. The 2008 SPPA suggests that 10%³² of the U.S. population have engaged in creative activity in a 12-month period (activities, for instance, such as painting, drawing, ceramics, pottery, and sewing), compared with, for example, 58% of D.U.M.B.O. Art Under the Bridge Festival audiences and 60% of Tamejavi Festival audiences, who report engaging in creative activity daily, weekly, or monthly.

Notes

²² In the national festival survey, the organizers reported their best estimates of audience statistics and numbers should be viewed as such. Additionally, roughly 40% of survey respondents did not answer the questions on audience race and ethnicity. Presumably this was because the information was not readily available.

²³ To facilitate analysis of long-term trends in the survey data, certain art forms have been designated in the SPPA as “benchmark” activities. There are seven benchmark arts activities: jazz, classical music, opera, musical plays, non-musical plays, ballet, and visits to art museums or galleries.

²⁴ Some of these differences may be explained by the different data collection techniques: The national festival survey collected audience demographic information from festival organizers who provided estimates on audience profile. SPPA collected information from American adults and asked them if they had attended a jazz or classical music performance, opera, musical play, non-musical play, or ballet or if they had visited an art museum or gallery in the 12 months ending May 2008.

²⁵ The 2008 SPPA collected information on crafts fairs, visual arts festivals, and outdoor performing arts festivals. Demographic characteristics of individuals attending festivals and fairs are similar to those attending benchmark arts and, thus, are not reported separately. However, audiences for outdoor performing arts festivals in the SPPA showed greater racial/ethnic diversity than audiences for many benchmark live arts events.

²⁶ As defined by respondents' selection of the one best description of their festival.

²⁷ This may be due in part to different data collection techniques. The SPPA measures only adult (18 years and over) attenders, while the outdoor arts festival survey collected information about attenders of all ages.

²⁸ Survey respondents were allowed to check more than one age category to describe their festival audiences. The “multiple-response” nature of the data precluded comparisons to U.S. Census and SPPA figures.

²⁹ The case studies collected demographic information from seven festival audiences. Data collection was conducted systematically—but was not intended to generate scientific estimates of the overall population of festival-goers. The case studies represent only seven out of thousands of outdoor arts festivals nationwide.

³⁰ The case study festivals are all in urban communities, which may explain some of the variance in demographic makeup between the case study audiences and the SPPA's benchmark arts audiences.

³¹ The 2008 SPPA survey included choral and chamber music in that question on orchestra performances.

³² This is a rough estimate based on many different types of creative activity. For more information, the reader is referred to page 47 of the 2008 SPPA report.



Kids painting a mural at the Houston International Festival. Photo courtesy of Houston International Festival

Piccolo Spoleto turns the city into a stage, creating community by connecting Spoleto to the community. Spoleto has always used the traditional venues of our community. And Piccolo Spoleto has always been obliged to use alternative venues like churches and parks and the side of buildings. It was Mayor Riley's idea to turn the city into a stage, putting the symphony at the foot of the Market. A lot of people wouldn't know this festival was going on unless they happened to be walking by. This way, the excitement that people have about Spoleto transfers over to the people on the street.

– Festival administrator

Section 5

Integration with Community Life

Festivals and the communities³³ in which they occur have a symbiotic relationship. More than half of the festivals surveyed have occurred in their host communities for more than ten years, and they provide education, employment, and volunteer opportunities to local residents. Festivals bring together segments of the community who may not normally interact and contribute to the local economy. Festivals also are dependent on their host communities, relying on financial and service support provided by local government and business as well as year-round and seasonal staff and volunteers that run the event.

I. THE NATIONAL SURVEY RESULTS

Long-Term Presence in Communities

Outdoor arts festivals have an established presence in the communities where the festivals are held. Over 80% of the festivals have occurred in its current city or town for at least five years, and 59% for at least 10 years (see Figure 15).

Educational Opportunities

Festivals create educational opportunities for the public. About two-thirds (64%) of festivals offers formal educational activities or programming, such as lectures, artist demonstrations, and classes. The most common number of educational programs at a festival is between one and nine. Figure 16 is based on the re-

sponses of survey respondents who said their festival has an educational component.

Community Support

The festivals benefit from the community's largesse, both public and private. The majority (88%) receive funds from corporate sponsors; foundations; or local, state, or federal government. Figure 17 shows the prevalence of corporate sponsorship of outdoor arts festivals; 72% of festivals received corporate dollars. Local governments play an important role too; 44% received funding from the city government.

Festival Staffing & Volunteerism

Festivals depend heavily on the community's human resources, especially during the festival season. Festivals employ minimal, paid staff, whether year-round or seasonal; 70% employ five or fewer full-time paid employees (see Figure 18).³⁴ Based on the national survey results, the festivals are planned by a small number of paid, year-round staff and run largely by a volunteer army (see Table 5). During the off-season, festivals rely, on average, upon 15 volunteers and, during the festival season, upon 104 volunteers.

II. CASE STUDY RESULTS

Outdoor arts festivals contribute to local communities in important ways, according to the case study participants. They provide opportunities for arts education,

Figure 15. Percent of Festivals, by Number of Years They Have Been Produced in the Same Town

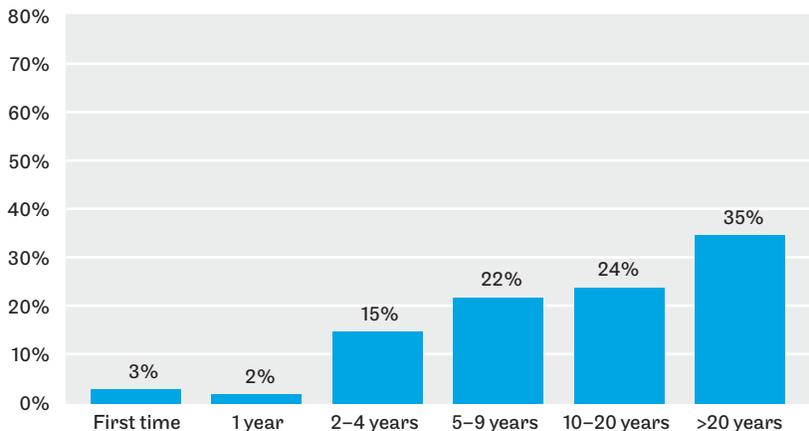
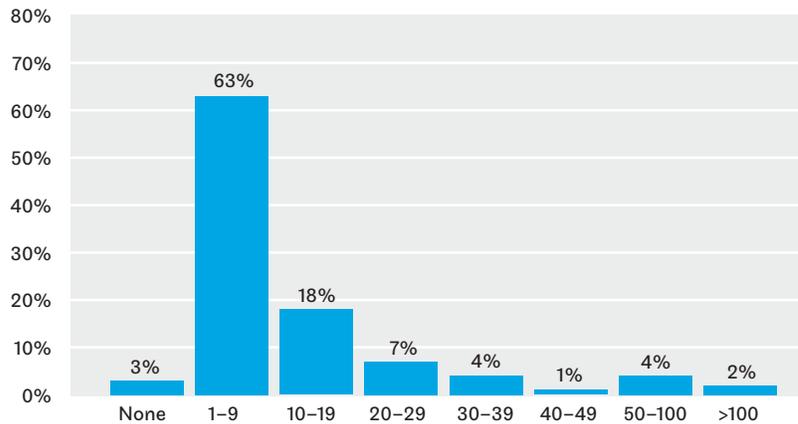
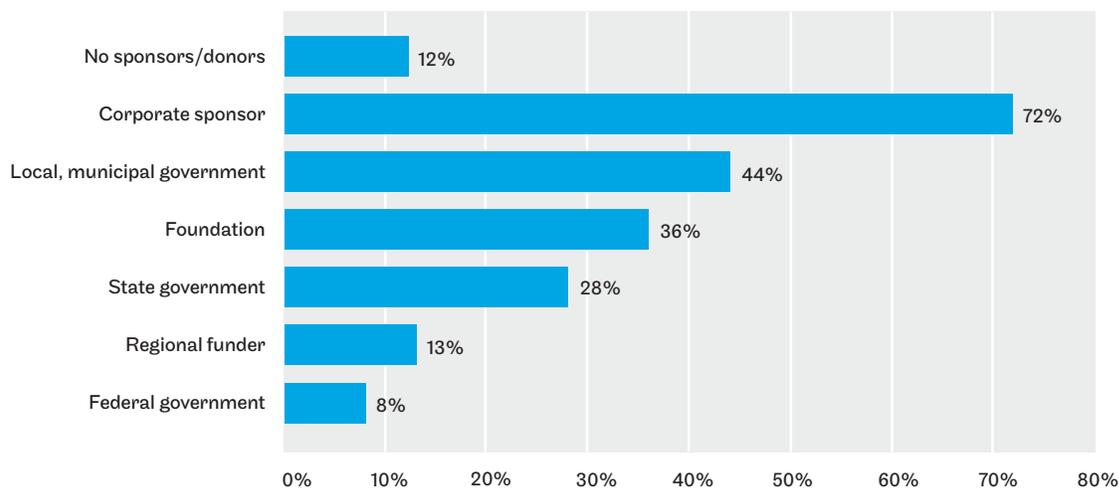


Figure 16. Percent of Festivals, by Number of Workshops, Lectures, or Other Educational Events Scheduled over Festival’s Duration



* Inexplicably, 3% of festivals said “none,” even though they had said in a prior question that their festival has an educational component.

Figure 17. Percent of Festivals, by Source of Sponsorship/Donations During the Most Recent Season (*multiple answers allowed*)



employment, and civic engagement. The festivals bring people from suburbs and surrounding areas into city centers. Every year, festivals attract segments of the community that might not normally spend time together or celebrate with each other. Festivals contribute to local economies and foster a sense of pride within communities. In most of the seven case study sites, three-quarters of the festival audience said the festival is an important part of the community. And several of the case study festivals (including iFest, Piccolo Spoleto, and Lowell Folk Festival) have conducted economic impact studies that demonstrate the festival’s stimulus effect on the local tourism industry.³⁵

Community Support

According to festival administrators and volunteers such as board members, healthy, long-term partnerships between festivals and government are essential to sustaining festivals’ contributions to community life. Local departments of parks and recreation, police, and street and sanitation departments provide critical services that festivals depend on. Festivals cannot take place without the cooperation of these public agencies to grant services, licenses, and permits. For some case study festivals, city or county governments contribute these services; other festivals purchase them from local governments. For example, in 2007, iFest paid the City of Houston more than \$180,000 in costs for sanitation and security services. These costs for Indian Market and D.U.M.B.O. Art Under the Bridge Festival also were high.

Figure 18. Percent Distribution of Festivals,³⁶ by Organization’s Number of FTEs³⁷

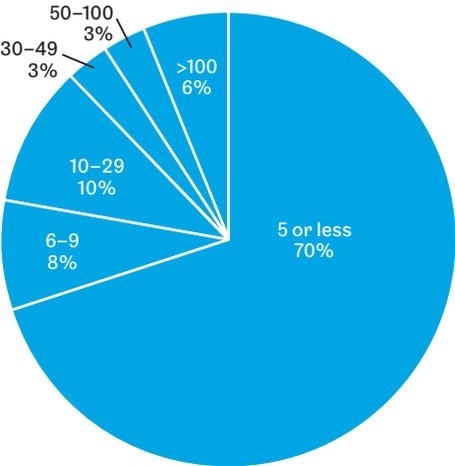


Table 5. Average³⁸ Number of Staff Per Festival

Year-Round:
<ul style="list-style-type: none"> On average, festivals have 2-3 paid, full-time (FT) staff; 2-3 paid, part-time (PT) staff; and 15 volunteers 55% of festivals have paid, year-round FT or PT staff 61% have year-round volunteer staff
Seasonal:
<ul style="list-style-type: none"> On average, festivals have 5 paid, full-time people; 9 paid, part-time people; and 104 volunteers 28% of festivals have paid, seasonal FT staff 49% have paid, seasonal PT staff 77% have seasonal volunteer staff

Outdoor venues present special challenges that require a strong partnership between the festival and local government. Sometimes the festival has to create an infrastructure, even if only temporary. Several festivals work with state and federal level parks and law enforcement agencies to secure space and ensure public safety. Organizers of Houston’s iFest, for instance, work closely with the Houston Office of Cultural Affairs and other city agencies to coordinate festival needs, such as street closures and safety measures. Similarly, the City of Lowell supports the Lowell Folk Festival by giving monetary aid to the festival and providing staff from the Department of Public Works, Police Department, Fire Department, Electrical Department, and Parks Department. The organizers of Santa Fe Indian Market work closely with the City of Santa Fe to coordinate crucial city services such as street closures, lavatory facilities, policing, and traffic diversion.

Educational Opportunities

In addition to their relationship with local government, the case study festivals are involved with local

schools and school districts and, in some cases, make a significant contribution to the arts and cultural education of local children. Several of the case study festivals have long-standing, substantive relationships with faculty, administrators, and students from local universities, colleges, and community colleges. These relationships with schools range from enabling students, teachers, and parents to visit the festival to providing professional development and training opportunities for teachers.

Festival Staffing and Volunteerism

The national survey documented the festivals’ reliance on a large volunteer corps, and the case studies give insights into how highly the volunteers value their role. Volunteers provided professional services and expertise of significant value: setting up and controlling sound systems, marketing the festival, producing fundraising and other special events, serving as festival curators and programmers, working in liaison with local government, and organizing other volunteer labor. In focus groups, volunteers said they act as “ambassadors” or hosts for the city during the festival and that doing so is one of the most important ways they serve their community. Several said they’ve volunteered for their festival since they were teenagers or children—for 20 years or more. In addition to enjoying their ambassador role, volunteers embrace the opportunity to meet and talk with artists and closely observe how they work.

Notes

³³ For the purpose of this section, “community” is intended to refer broadly to the local environs of outdoor arts festivals—a definition that does not admit of strict geographical boundaries.

³⁴ No attempt was made in the questionnaire to standardize FTEs in terms of number of hours worked. The respondents were asked, “How many FTEs (full-time equivalents) does your organization employ? Include all parts of the organization, not just the office or division in charge of the festival.”

³⁵ Economic impact studies were internal documents of the case study sites and are not publicly available.

³⁶ The unit of analysis is the 1,264 responding festival organization and not the 1,413 festivals, which are the unit of analysis for the rest of the report.

³⁷ The question asked about the number of people working for the festival as well as the organization overall, if the festival was part of a larger organization.

³⁸ The range in response to questions on year-round and seasonal paid staff and volunteers is large. For full-time, paid year-round staff, the number of staff ranges from 0–140; for part-time paid year-round staff, 0–200; for year-round volunteer staff, 0–1,200; for full-time paid seasonal staff, 0–450; for part-time paid seasonal staff, 0–640; and for seasonal volunteer staff, 0–10,000. Median number of year-round staff is 1 full-time, 1 part-time, and 2 volunteers. Median number of seasonal staff is 0 full-time, 0 part-time, and 20 volunteers.



BRIC–Celebrate Brooklyn. Photo by Ryan Muir

What impresses me is the spirit of collaboration. There is a way of doing business that, if it is going to benefit the city, everyone is going to pull together. This city has always pulled together. There are politics, too, but we all just want the best to happen for the city.

– Festival administrator

Section 6

Festival Administration

Festivals assume a variety of administrative structures, although not-for-profit festival organizers were most frequently identified in this study.³⁹ The case studies reveal, however, that public-private partnerships afford festivals a financial flexibility that other governance models do not offer. The majority of festivals generates less than \$100,000 annually and relies in part on in-kind donations to produce the events.

I. THE NATIONAL SURVEY RESULTS

Organizational Structure

The majority of festival organizations that responded to the survey are not-for-profit entities (see Table 6).

Most of the organizations running outdoor arts festivals are relatively small, with five or fewer full-time equivalent positions (FTEs) in the entire organization.⁴⁰ See Section 5.

Charitable Giving to Festivals

Eighty-four percent (84%) of festivals in the national survey received in-kind donations during their most recent season. Among this group, marketing and advertising was the most common donation (received by 53% of festivals), followed by food (38%), and venue (30%). See Figure 19.

Revenue Generated

The majority of festivals (75%) generated less than \$100,000 in revenue⁴¹ in their most recent season, and nearly half (49%) generated under \$25,000 (see Figure 20). Only a quarter (26%) earned \$100,000 or more.

Self-described music festivals are more likely than other kinds of festivals to generate more than \$100,000 (see Table 7)—but they also tend to run proportionately larger expenses than other types of festivals (see Table 8). Festivals defined by their organizers as racial/ethnic festivals and arts and crafts festivals are the least likely to earn \$100,000 or more in revenue.

A correlation⁴² exists between revenue generated and the festival's number of scheduled performances. Similarly, number of performances is moderately correlated with expenses.⁴³ The correlations suggest that larger festivals, as measured by number of performances, simultaneously generate more revenue

Table 6. Type of Organization⁴⁴

Structure	
Not-for-profit	80%
Government-related *	12%
For-profit	5%
Other **	5%
University-affiliated	3%

*Part of a municipal, state, or federal government agency.

** "Other" includes unique respondent comments. Some examples are "Chamber of Commerce," "Comprised of volunteers only," "Organization is an LLC but does not operate for the purposes of profit."

and incur higher expenses.

Corporate sponsorship and vendor fees are the leading sources of festival revenue, according to the national survey respondents (see Figure 21). Seventy-one percent (71%) of festivals received corporate dollars in their most recent season, and 69% received participant fees from vendors. Information about revenue amounts from each source was not collected.

Despite the current economic recession, only a small group of festival organizers foresee a drop-off in revenue. More than a third (36%) of national survey respondents predict the revenue from their 2010 festival will be higher than the amount generated in 2009; 16% believe it will be lower (Figure 22). The largest group (48%) anticipates little difference between 2009 and 2010 revenue.

The 16% who predicted a drop in revenue were asked how they will compensate for the decrease. The most common response, given by 68% of this group, is that they will pursue more grants and donations. Figure 23 shows their other strategies for offsetting a decrease in revenue.

Expenses

A festival's expenses typically run below \$50,000. Sixty percent (60%) of all festivals reported expenses under this threshold, and nearly three-quarters (73%) had expenses under \$100,000 (see Figure 24).

Figure 19. Percent of Festivals by Type of In-Kind Donations Received During Festival's Most Recent Season (*multiple answers allowed*)

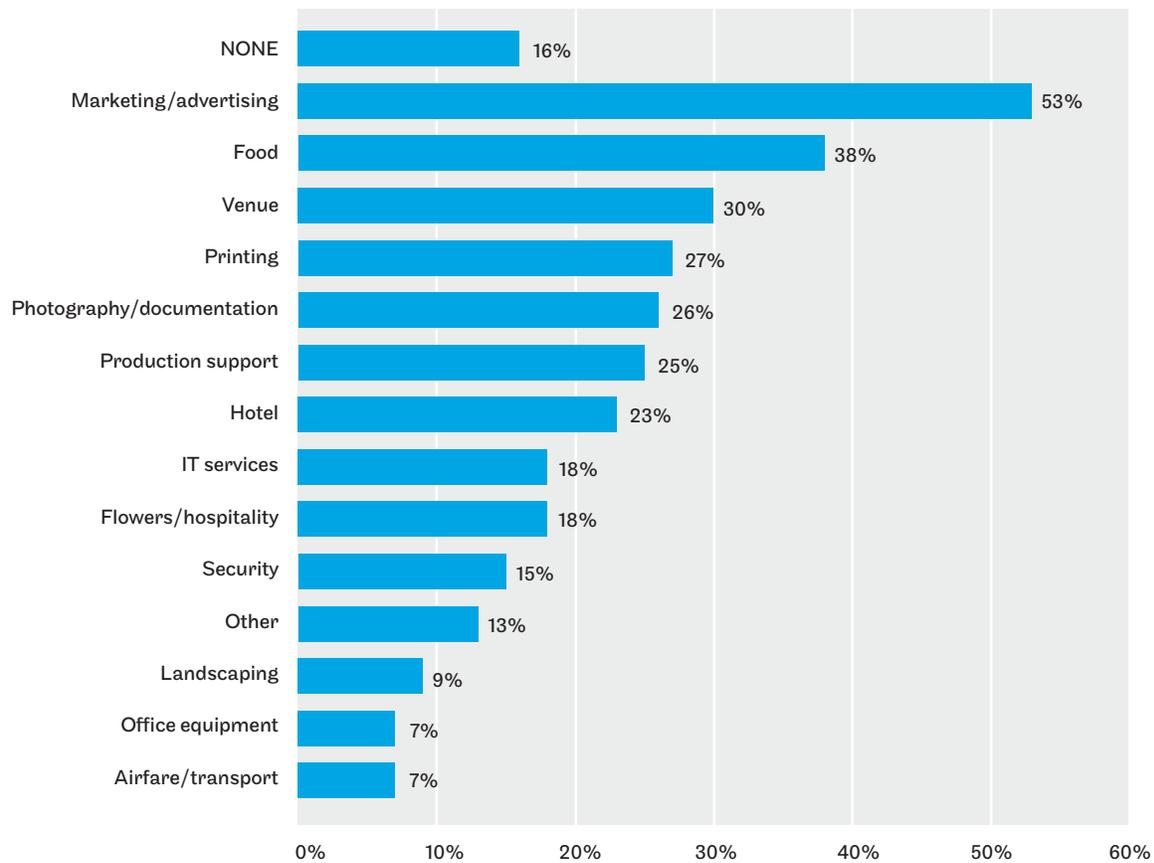
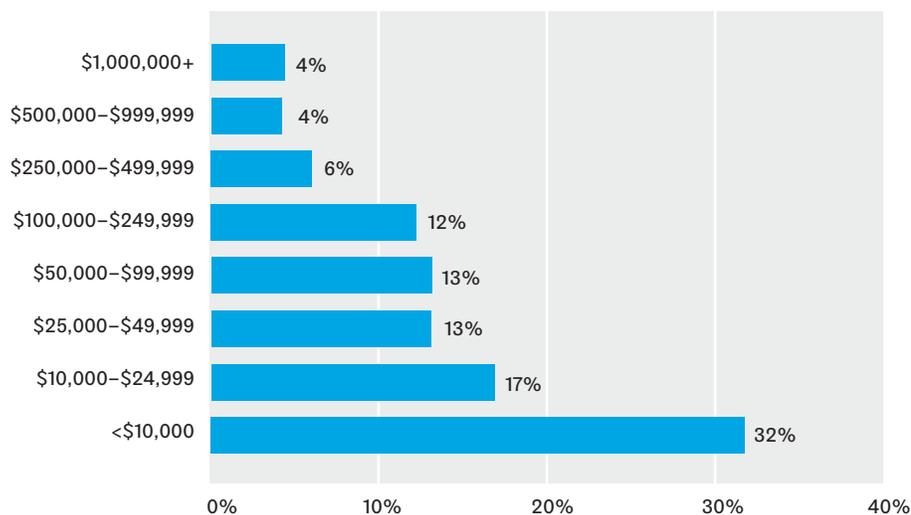


Figure 20. Percent of Festivals by Amount of Revenue Generated During Most Recent Season



Music festivals tend to be the most expensive to produce: 39% report expenses over \$100,000. This statistic compares with 28% of multidisciplinary, 12% of arts and crafts, 19% of racial/ethnic, 18% of visual arts, and 26% of “other” types (see Table 8).

Artist Fees

A quarter of festivals (24%) pay no artist fees whatsoever (Figure 25)—these are typically arts and crafts festivals.⁴⁵ Three-fourths of festivals (76%) in the national survey paid artist fees totaling less than \$30,000, or nothing at all, during their most recent season. Music

Figure 21. Percent of Festivals by Revenue Source for Most Recent Season (*multiple answers allowed*)

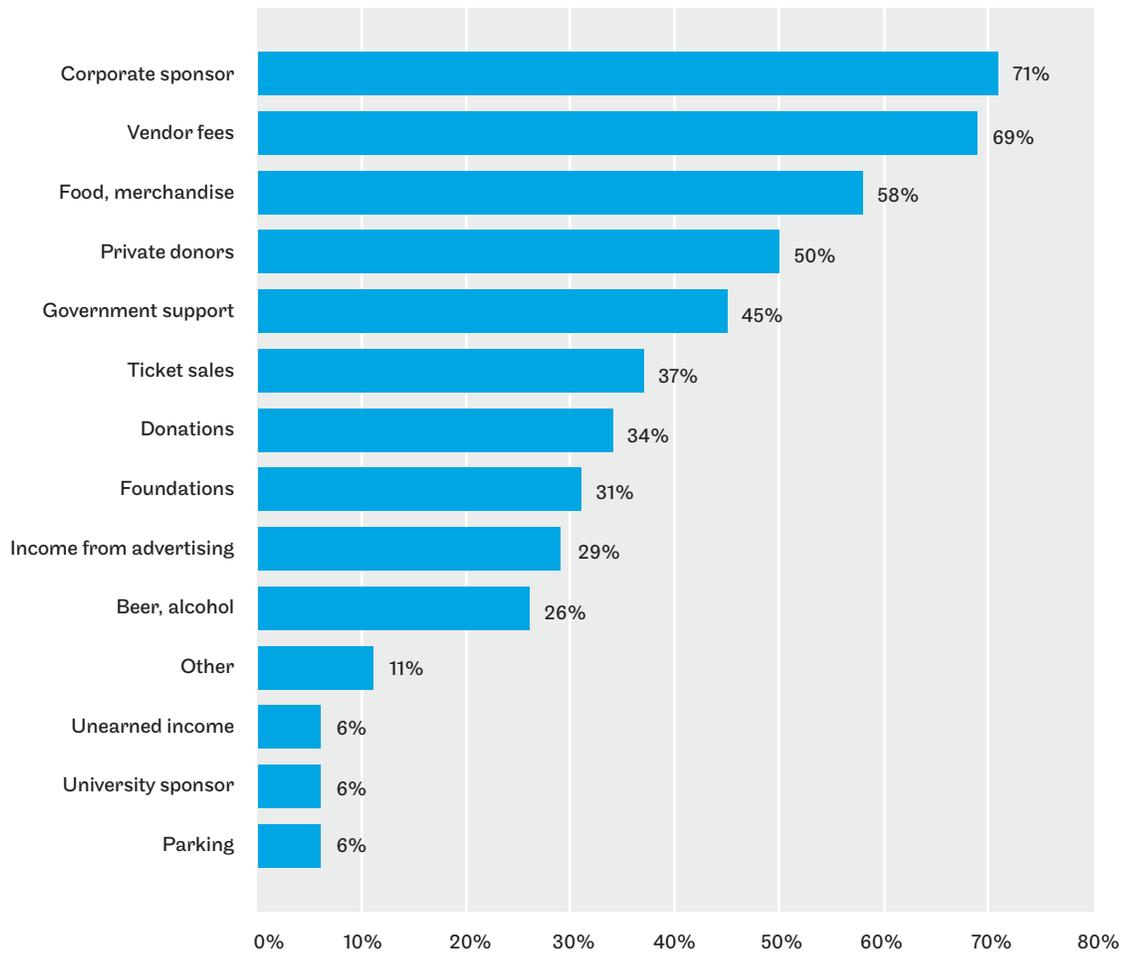


Table 7. Revenue by Self-Reported Festival Type

Type	Under \$10,000	\$100,000+
Arts & Crafts (n=228)	36%	17%
Multidisciplinary (n=157)	33%	24%
Music (n=267)	27%	34%
Other (n=91)	33%	25%
Racial/Ethnic (n=81)	33%	16%
Visual Arts (n=79)	39%	21%

festivals, however, are more likely than other kinds of festivals to pay higher fees. Twenty-six percent (26%) of music festivals pay artist fees exceeding \$75,000, compared with 2% of arts and crafts festivals, 4% of visual arts festivals, and 7% of racial and ethnic festivals.

Most festivals (75%) do not pay artists with in-kind perks such as lodging, food, or travel (see Figure 26),

Figure 22. Percent Distribution of Festivals, by Organization's Projections for 2010 Revenue in Comparison with 2009 Revenue

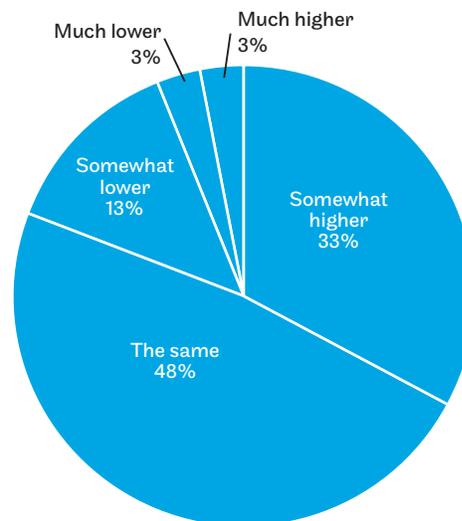


Figure 23. Percent of Festivals, by Organization's Strategy for Offsetting Lower Revenue in 2010
(multiple answers allowed)

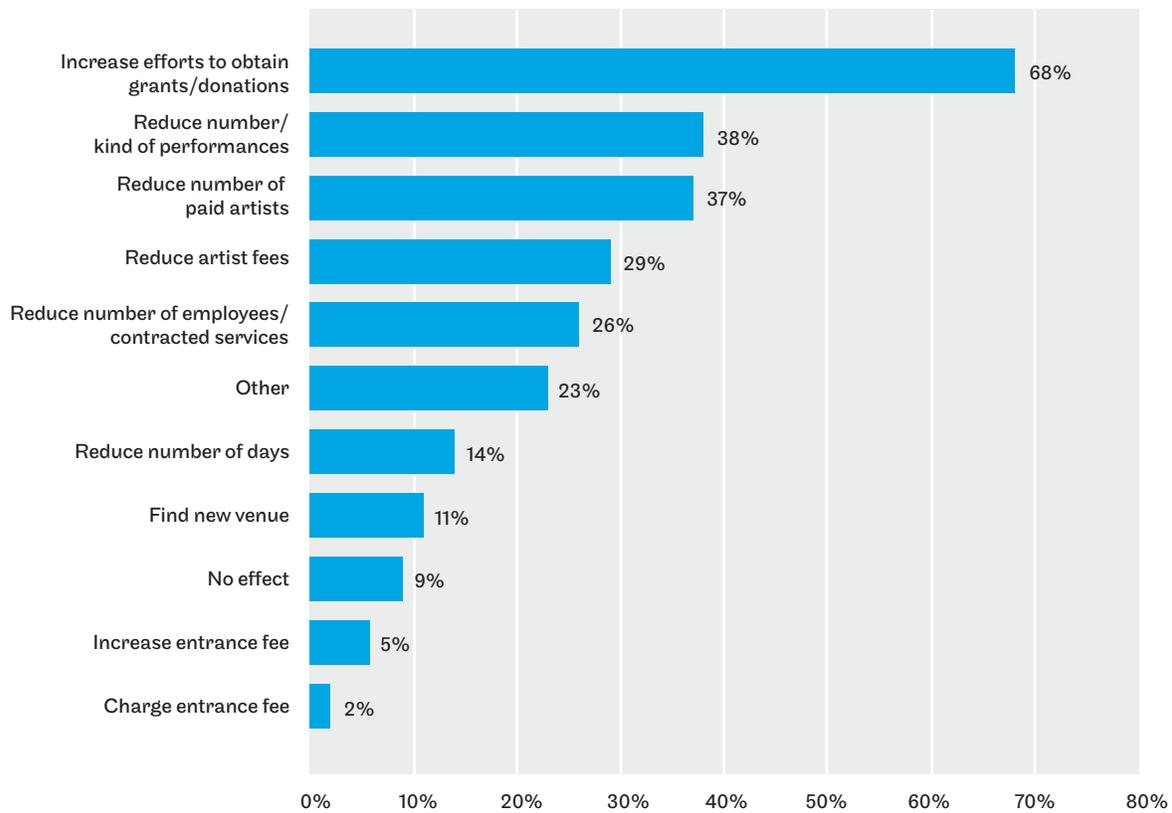
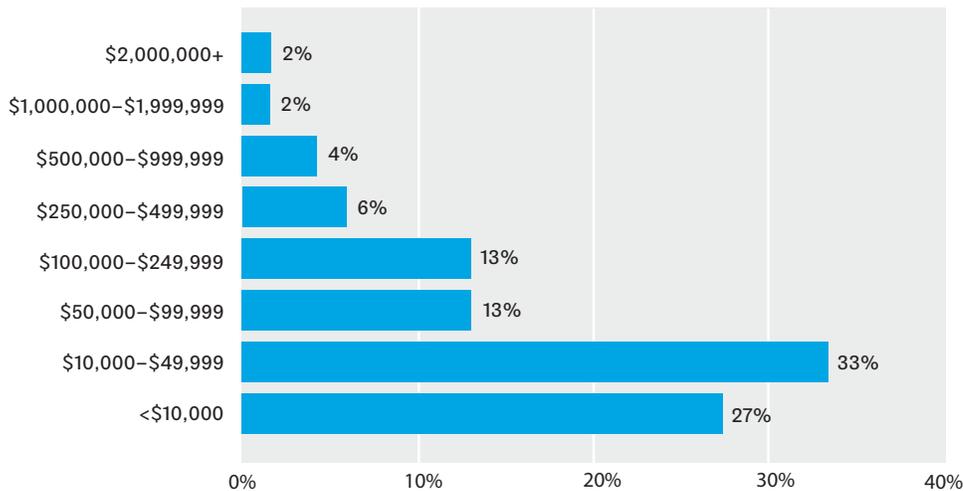


Figure 24. Percent of Festivals, by Total Expenses During Most Recent Season



regardless of whether they pay the artists a fee or not. The less a festival paid in total artist fees for one season, the less likely they were to give the artist complimentary food and lodging.

Ratio of Revenue to Expenses

The national survey collected revenue and expense information using ranges, such as \$10,000–\$24,999.⁴⁶

Because the response choices were categories, precise comparisons of revenue and expenses could not be made, only general comparisons. The general comparisons show that 68% of festival respondents reported the same category for expenses as they did for revenue, and another 26% were within one category (split evenly between festivals whose revenue was a category higher than expenses, and those for whom it was a cat-

Figure 25. Percent of Festivals, by Total Artist Fees Paid

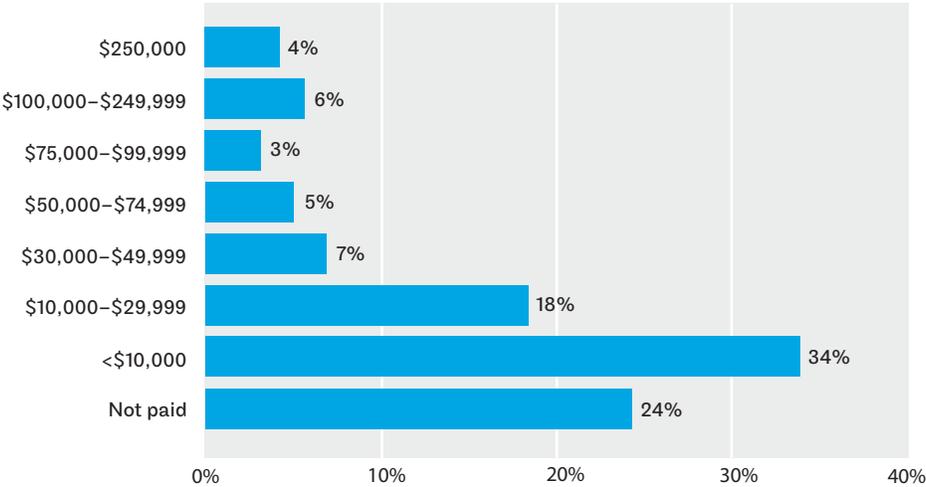
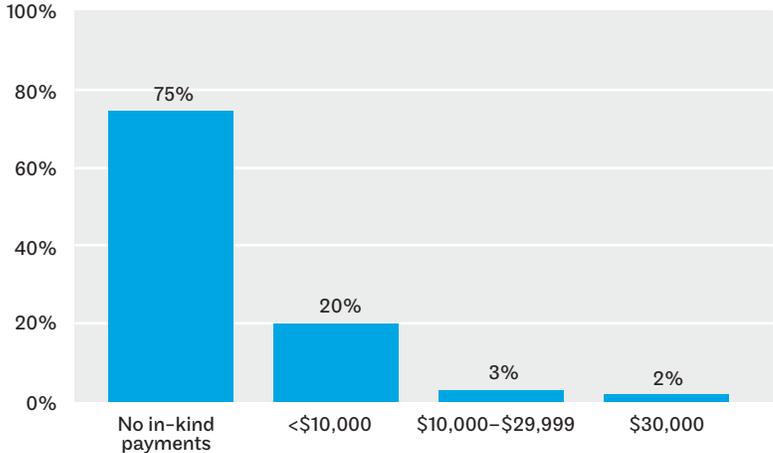


Figure 26. Percent of Festivals, by Total Value of In-Kind Payments to Artists



egory lower). This rough comparison suggests that the festival respondents generally had revenue close to expenses.

II. CASE STUDY RESULTS ⁴⁷

Organizational Structure

Broadly speaking, it appears that festivals structured around a public-private partnership have important sources of financial flexibility that serve them well in leaner economic times. Piccolo Spoleto, Lowell Folk Festival, and Chicago Jazz Festival are public-private partnerships. The remaining four case study festivals—Houston International Festival, Santa Fe Indian Market, Tamejavi Festival, and D.U.M.B.O. Art Under the Bridge Festival—are private, not-for-profit festivals.

Among the case study festivals, those administered by a public-private partnership draw on public re-

Table 8. Expenses by Festival Type

Type	Under \$10,000	\$100,000+
Arts & crafts	44%	12%
Multidisciplinary	25%	28%
Music	15%	39%
Other	27%	26%
Racial/ethnic	22%	19%
Visual arts	36%	18%

sources to meet several of their key expenses. For example, much of the administration and management of Piccolo Spoleto and Lowell Folk Festival are accomplished by civil servants who pick up seasonal responsibilities for the festival as part of broader year-round

job responsibilities. The festivals could not occur without contract experts and volunteers, but using public employees for some of this work can significantly lower administrative costs and free up donated resources for other needs. Another example: some festivals bear significant costs for fees, permits, and services from the public sector, but those in a public-private partnership and even those with strong albeit less formal support from the public sector are at a financial advantage. In 2007, iFest paid the City of Houston more than \$180,000 in costs for sanitation and security services. Costs for Santa Fe Indian Market and D.U.M.B.O. Art Under the Bridge Festival also were high. It should be noted that these are the most characteristically “private” festivals among the case study cohort. All three festivals are conducted by 501(c)3 private, not-for-profit organizations (as opposed to public-private partnerships).

Revenues

The case study festivals rely on diverse income streams: earned income, foundation and government grants, corporate sponsorships, and in-kind donations. They earn sizable incomes from vendors, especially food and beverage vendors. Festivals that require tickets⁴⁸ for all or some of their programming garner a significant share of their revenue from those sales. Currently the case study festivals have less money coming in from grants and sponsorships than in previous years. As a result, the private not-for-profits in the study are drawing on their assets to balance their budgets, and the public-private partnerships are shrinking their programming.

Expenses

The case study festivals incur three types of expenses: administrative costs, production costs, and artists’ fees and expenses. Administrative costs include full-time permanent employees, seasonal employees, and contractors. Production costs include expenses related to building the complex and extensive temporary venues necessary for festival programming as well as paying for fees, permits, and services from local government. Artists’ fees and expenses include payment for performances as well as the costs of travel, board, and lodging for visiting artists. Some of the case study festivals do not pay for some of these expenses. For example, D.U.M.B.O. Art Under the Bridge Festival does not currently subsidize its presenting artists for production, performance, or travel. iFest lodges many visiting artists with volunteer hosts.

Notes

³⁹ These results may reflect sample bias, since our means for distributing information about the survey—including the survey’s web link—were largely through arts service organizations.

⁴⁰ No attempt was made in the questionnaire to standardize FTEs in terms of number of hours worked. The respondents were asked, “How many FTEs (full-time equivalents) does your organization employ? Include all parts of the organization, not just the office or division in charge of the festival.”

⁴¹ Revenue includes all sources of revenue, but not in-kind donations.

⁴² Correlation is $r=.503$, which indicates a moderate correlation between revenue generated and number of scheduled performances.

⁴³ Correlation is $r=.521$, which indicates a moderate correlation between number of performances and festival expenses.

⁴⁴ The unit of analysis is the responding organization, of which there were 1,264, and not the 1,413 festivals, which are the unit of analysis for the rest of the report.

⁴⁵ However, the artists at arts and crafts festivals take home part or all of the money they earn from selling their products.

⁴⁶ Ranges were used to ease the reporting burden on the respondents, standardize the way in which they reported information, and lessen the intrusion on their accounting records.

⁴⁷ Generalizations about festival finances cannot be made from the small number of case study festivals. However, several themes that emerged from the site-based research merit further study in a wider pool of cases.

⁴⁸ Audience members who participated in focus groups consistently complained about the cost of tickets, when admission fees were charged. Festival administrators maintained that ticket costs were relatively low, considering the quality of programming.



The dance group Se'e Savi at the Tamejavi festival in Fresno, California. Photo by Eduardo Stanley

Section 7

Statistical Snapshots of Festivals, by Artistic Discipline

Descriptive information on festivals with 50 or more survey respondents is reported in this section. Festivals are categorized according to their self-reported festival type.

Snapshot: All Outdoor Arts Festivals.....	50
Snapshot: Arts and Crafts Festivals.....	52
Snapshot: Multidisciplinary Festivals.....	54
Snapshot: Music Festivals	56
Snapshot: Performing Arts Festivals.....	58
Snapshot: Racial and Ethnic Festivals.....	60
Snapshot: Theater Festivals.....	62
Snapshot: Visual Arts Festivals.....	64

Snapshot: All Outdoor Arts Festivals

- Number of festivals in national survey to self-describe as outdoor arts festivals: 1,413

Audience Characteristics

- Most common age of audience members: 35 to 54
- 55% female
- 73% Caucasian, 16% African American
- 15% Hispanic

Festival Characteristics

- Most often held in July (28% of festivals)
- Most common venue: public plaza or park (46% of festivals)
- Percent of festivals that last 1–3 days: 76%
- Percent of festivals that occur once a year: 95%
- Percent of festivals with 100 or more exhibitors: 43%
- Percent of festivals that are free: 59%
- Of festivals that charge, percent that charge under \$10: 35%
- Of festivals that charge, percent with a free or reduced ticket program: 75%
- Percent of festivals with audience size under 1,000 (Figure 27): 14%
- Percent of festivals with audience size under 10,000 (Figure 27): 60%

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 28): 62%
- Percent of festivals that expect lower revenue next season: 16%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 29): 60%

Figure 27. Percent of Outdoor Arts Festivals, by Total Audience Size

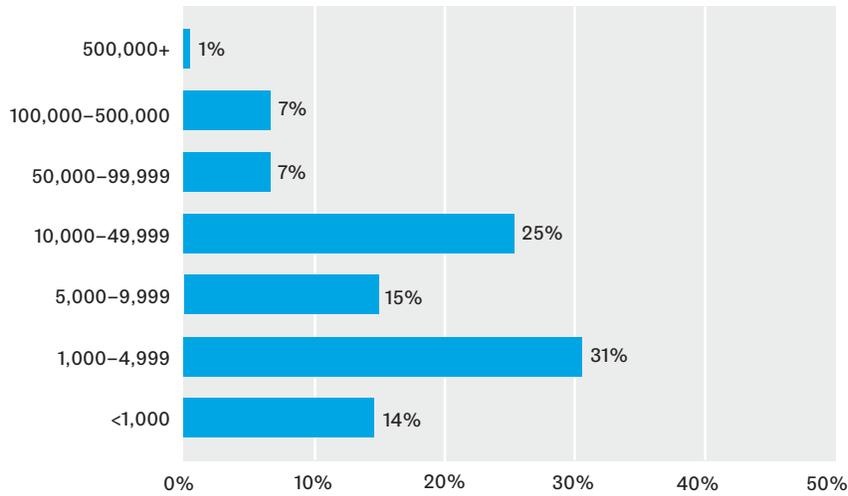


Figure 28. Percent of Outdoor Arts Festivals, by Total Revenue During Last Season

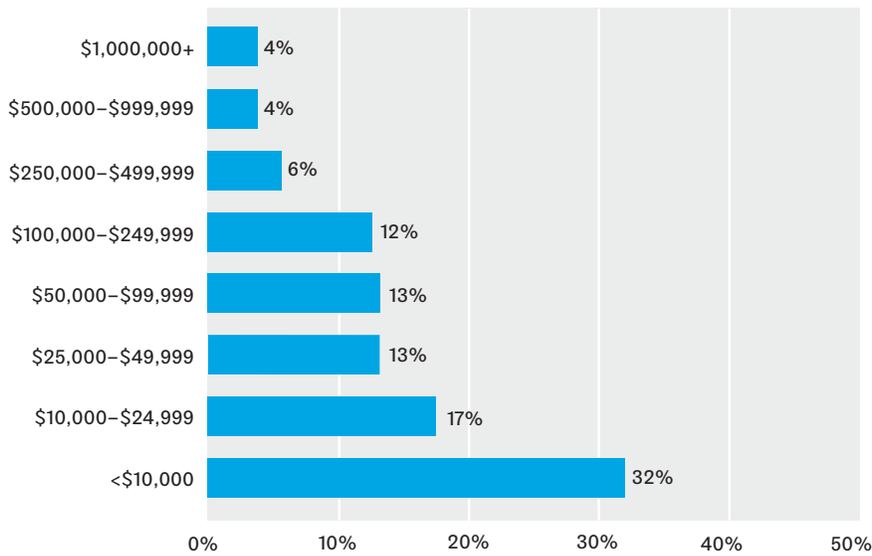
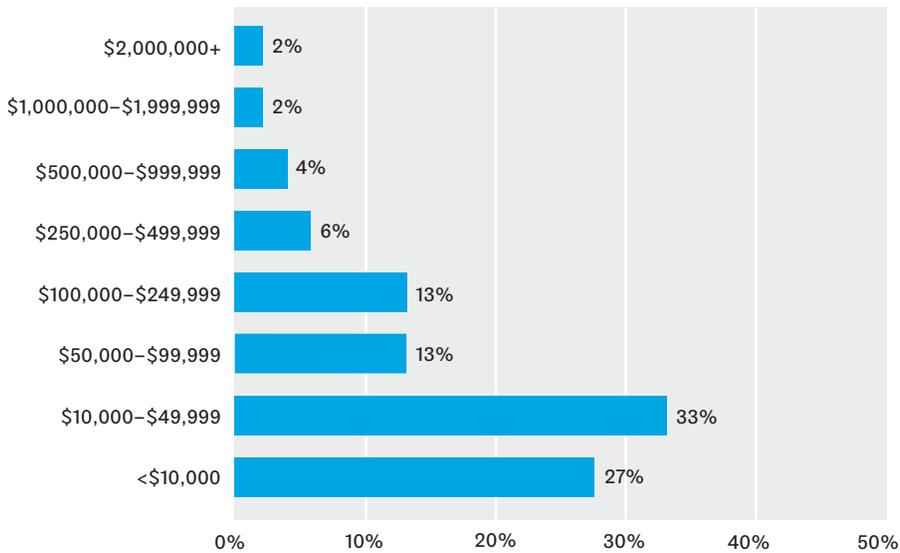


Figure 29. Percent of Outdoor Arts Festivals, by Total Expenses During Last Season



Snapshot: Arts and Crafts Festivals

- Number of festivals in national survey to self-describe as arts and crafts festivals: 260

Audience Characteristics

- Most common age of audience members: 45 to 54
- 60% female
- 82% Caucasian, 10% African American
- 11% Hispanic

Festival Characteristics

- Most often held in June, July, or September (equal percentages each month)
- Most common venue: public plaza or park (48% of festivals)
- Percent of festivals that last 1–3 days: 94%
- Percent of festivals that occur once a year: 95%
- Percent of festivals with 100 or more exhibitors: 59%
- Percent of festivals that are free: 75%
- Of festivals that charge, percent that charge under \$10: 76%
- Of festivals that charge, percent with a free or reduced ticket program: 72%
- Percent of festivals with audience size under 1,000 (Figure 30): 12%
- Percent of festivals with audience size under 10,000 (Figure 30): 56%

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 31): 71%
- Percent of festivals that expect lower revenue next season: 12%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 32): 76%

Figure 30. Percent of Arts and Crafts Festivals, by Total Audience Size

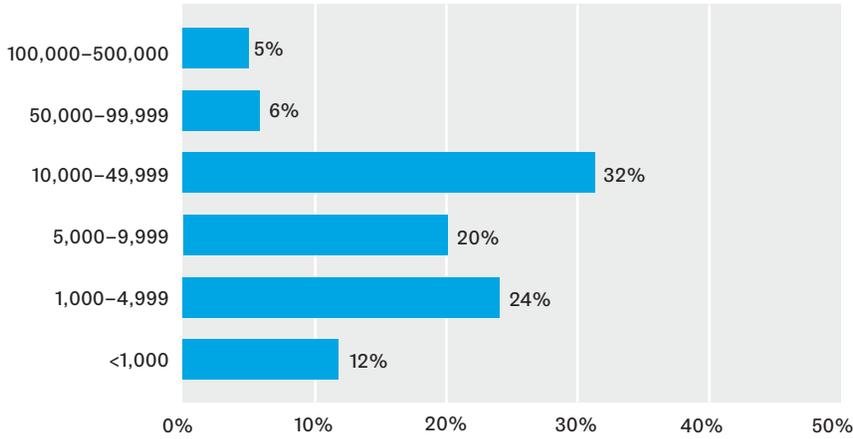


Figure 31. Percent of Arts and Crafts Festivals, by Total Revenue During Last Season

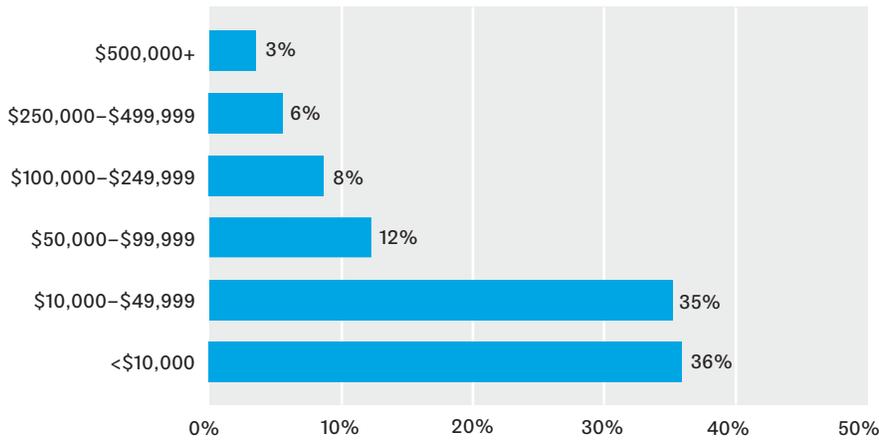
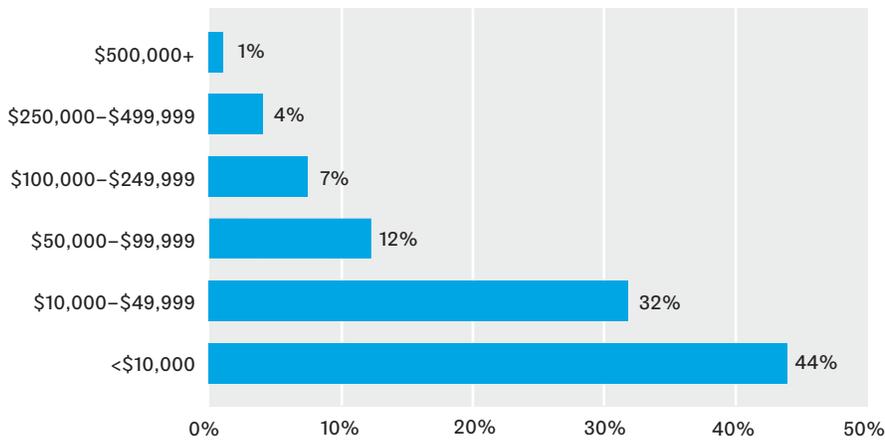


Figure 32. Percent of Arts and Crafts Festivals, by Total Expenses During Last Season



Snapshot: Multidisciplinary Festivals

- Number of festivals in national survey to self-describe as multidisciplinary festivals: 190

Audience Characteristics

- Most common age of audience members: 35 to 44
- 56% female
- 66% Caucasian, 22% African American
- 17% Hispanic

Festival Characteristics

- Most often held in June
- Most common venue: public plaza or park (52% of festivals)
- Percent of festivals that last 1-3 days: 74%
- Percent of festivals that occur once a year: 94%
- Percent of festivals with 100 or more performers/exhibitors: 48%
- Percent of festivals that are free: 65%
- Of festivals that charge, percent that charge under \$10: 59%
- Of festivals that charge, percent with a free or reduced ticket program: 61%
- Percent of festivals with audience size under 1,000 (Figure 33): 14%
- Percent of festivals with audience size under 10,000 (Figure 33): 56%

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 34): 62%
- Percent of festivals that expect lower revenue next season: 24%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 35): 58%

Figure 33. Percent of Multidisciplinary Festivals, by Total Audience Size

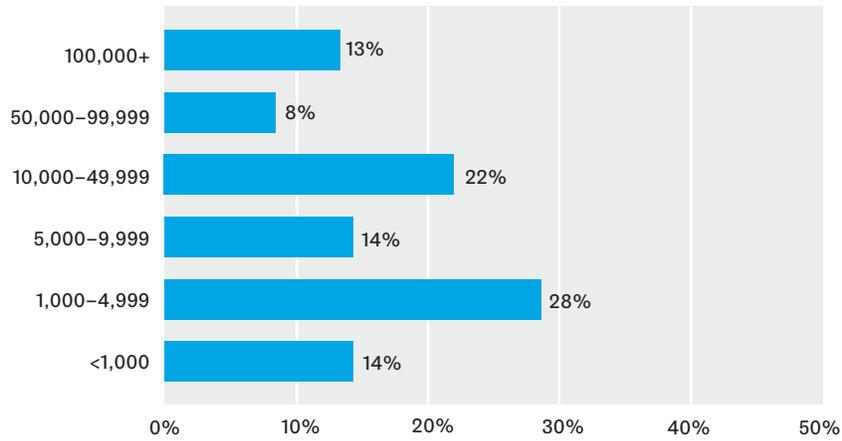


Figure 34. Percent of Multidisciplinary Festivals, by Total Revenue During Last Season

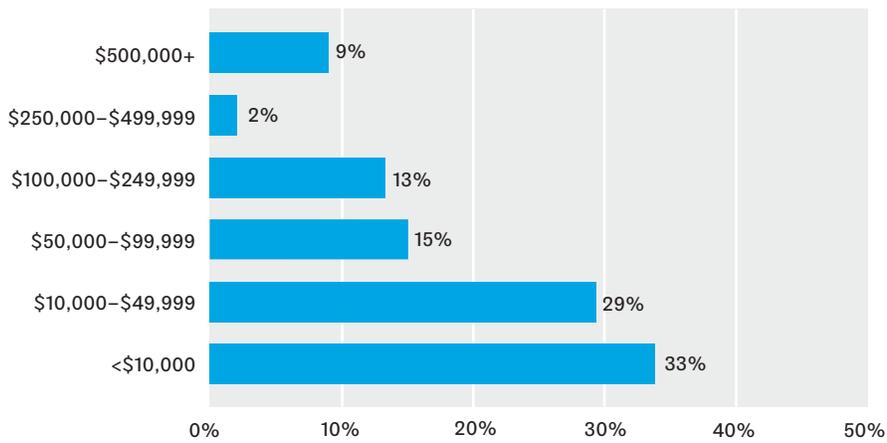
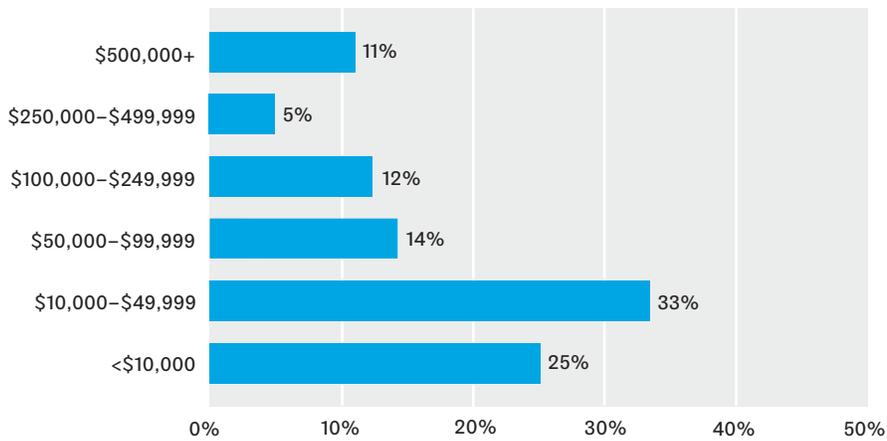


Figure 35. Percent of Multidisciplinary Festivals, by Total Expenses During Last Season



Snapshot: Music Festivals

- Number of festivals in national survey to self-describe as music festivals: 312

Audience Characteristics

- Most common age of audience members: 45 to 54
- 51% female
- 79% Caucasian, 15% African American
- 13% Hispanic

Festival Characteristics

- Most often held in July
- Most common venue: public plaza or park (40% of festivals)
- Percent of festivals that last 1–3 days: 61%
- Percent of festivals that occur once a year: 95%
- Percent of festivals with 100 or more performers: 34%
- Percent of festivals that are free: 42%
- Of festivals that charge, percent that charge under \$10: 14%
- Of festivals that charge, percent with a free or reduced ticket program: 74%
- Percent of festivals with audience size under 1,000 (Figure 36): 16%
- Percent of festivals with audience size under 10,000 (Figure 36): 63%

Programming

- Most common type of music played at music festivals (Table 9): Jazz (51% of music festivals)

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 37): 53%
- Percent of festivals that expect lower revenue next season: 13%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 38): 47%

Table 9. Types of Music at Music Festivals

(multiple answers allowed)

Type of Event	Percent of Festivals
Jazz	51%
Blues	48%
Folk/traditional	43%
Bluegrass	42%
Rock and pop music	33%
Country	30%
World	29%
Latin, Spanish, or salsa	28%
Rhythm and blues	28%
Contemporary or alternative rock	22%
Classical or chamber music, symphonic/orchestral	19%
Hymns or gospel music	17%
Other	17%
Concert or marching band	10%
Rap or hip-hop	8%
Broadway musicals or show tunes	7%
Lounge, DJ, electronica	7%
Opera	5%
Polka	5%

Figure 36. Percent of Music Festivals, by Total Audience Size

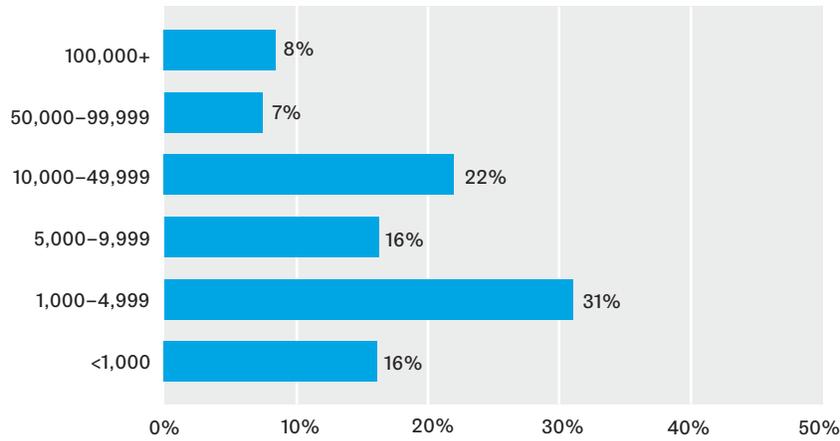


Figure 37. Percent of Music Festivals, by Total Revenue During Last Season

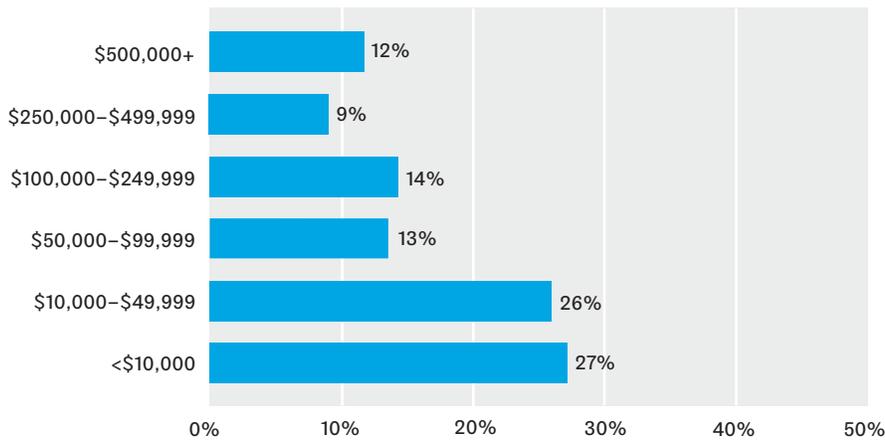
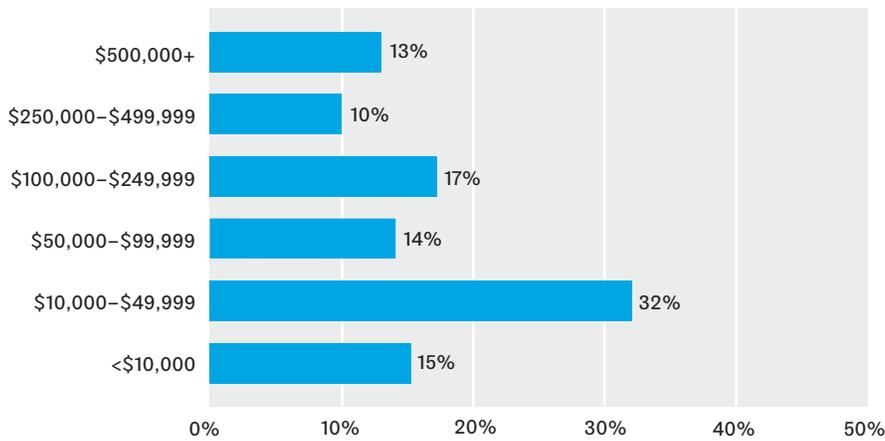


Figure 38. Percent of Music Festivals, by Total Expenses During Last Season



Snapshot: Performing Arts Festivals

- Number of festivals in national survey to self-describe as performing arts festivals: 50

Audience Characteristics

- Most common age of audience members: 55 to 64
- 54% female
- 70% Caucasian, 15% African American
- 15% Hispanic

Festival Characteristics

- Most often held in June
- Most common venue: public plaza or park (39% of festivals)
- Percent of festivals that last 1–3 days: 53%
- Percent of festivals that occur once a year: 94%
- Percent of festivals with 100 or more performers: 36%
- Percent of festivals that are free: 45%
- Of festivals that charge, percent that charge under \$10: 16%
- Of festivals that charge, percent with a free or reduced ticket program: 88%
- Percent of festivals with audience size under 1,000 (Figure 39): 16%
- Percent of festivals with audience size under 10,000 (Figure 39): 61%

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 40): 53%
- Percent of festivals that expect lower revenue next season: 22%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 41): 53%

Figure 39. Percent of Performing Arts Festivals, by Total Audience Size

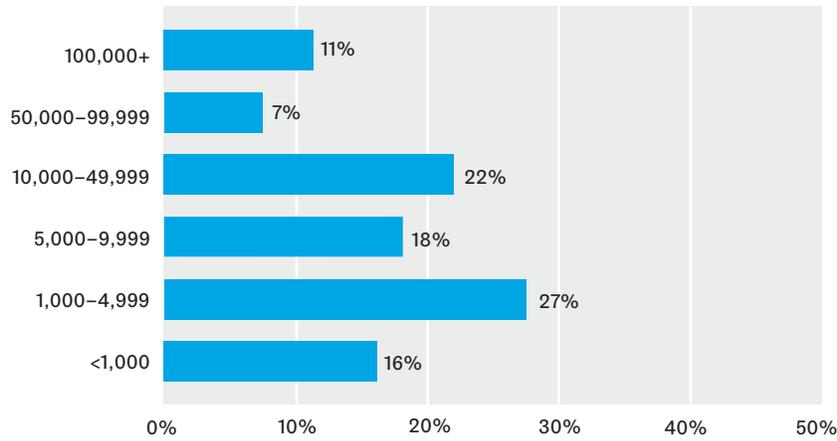


Figure 40. Percent of Performing Arts Festivals, by Total Revenue During Last Season

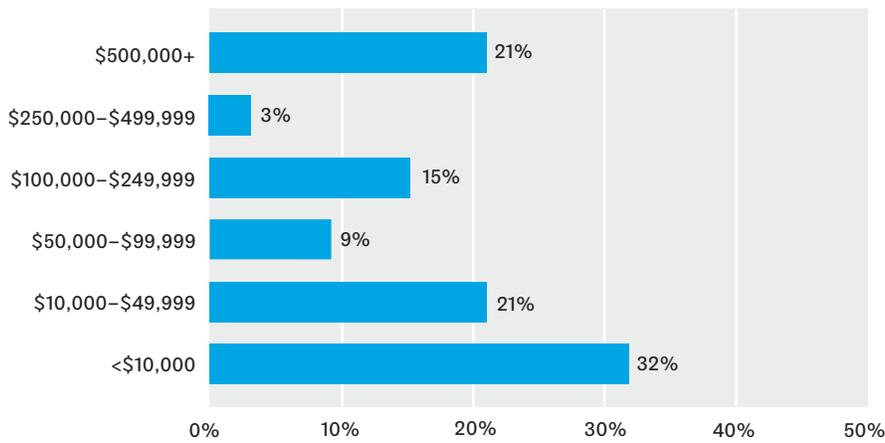
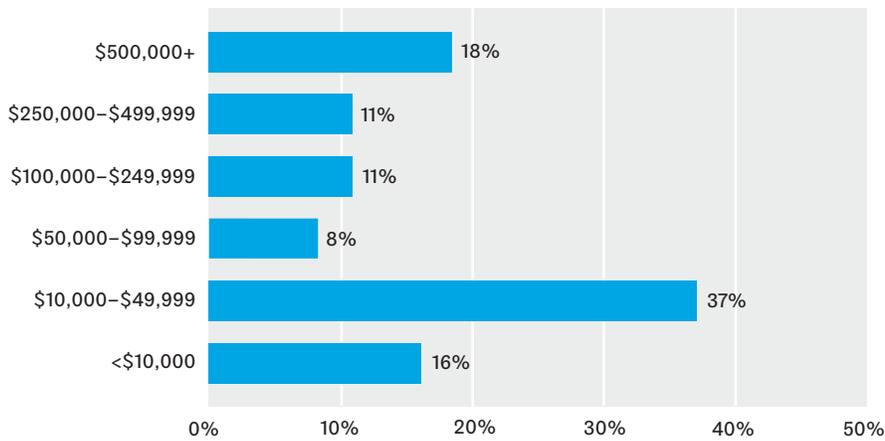


Figure 41. Percent of Performing Arts Festivals, by Total Expenses During Last Season



Snapshot: Racial and Ethnic Festivals

- Number of festivals in national survey to self-describe as racial and ethnic festivals: 99

Audience Characteristics

- Most common age of audience members: 35 to 44
- 54% female
- 50% Caucasian, 23% African American
- 18% Hispanic

Festival Characteristics

- Most often held in September
- Most common venue: public plaza or park (52% of festivals)
- Percent of festivals that last 1–3 days: 89%
- Percent of festivals that occur once a year: 96%
- Percent of festivals with 100 or more performers/exhibitors: 47%
- Percent of festivals that are free: 61%
- Of festivals that charge, percent that charge under \$10: 43%
- Of festivals that charge, percent with a free or reduced ticket program: 87%
- Percent of festivals with audience size under 1,000 (Figure 42): 9%
- Percent of festivals with audience size under 10,000 (Figure 42): 67%

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 43): 69%
- Percent of festivals that expect lower revenue next season: 13%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 44): 60%

Figure 42. Percent of Racial and Ethnic Festivals, by Total Audience Size

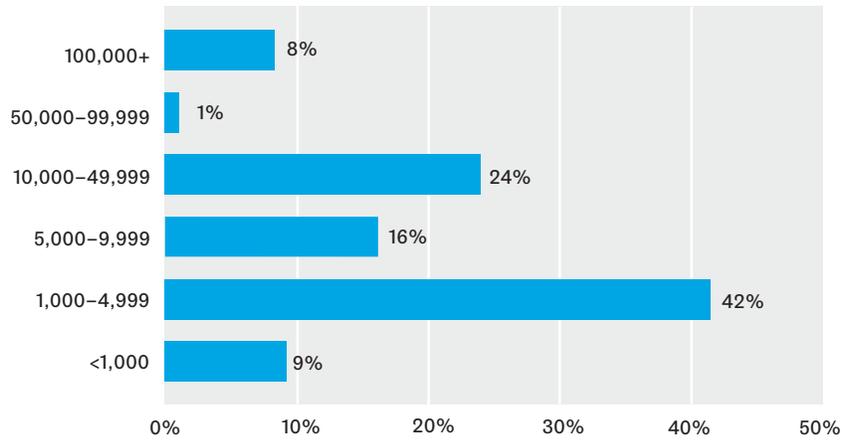


Figure 43. Percent of Racial and Ethnic Festivals, by Total Revenue During Last Season

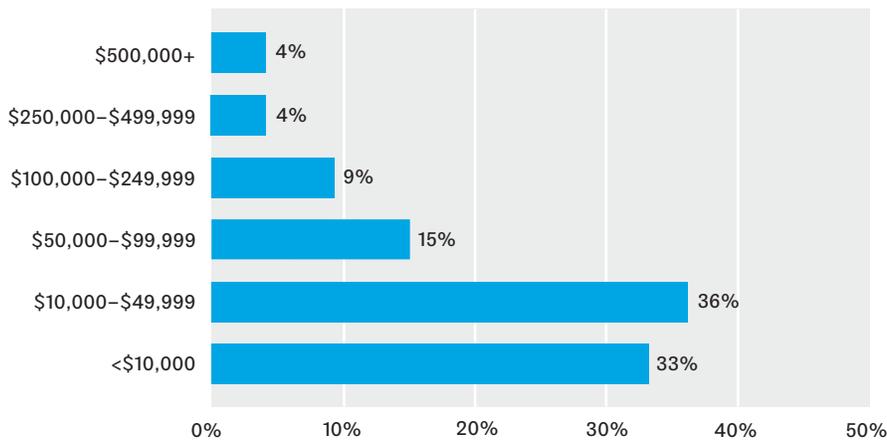
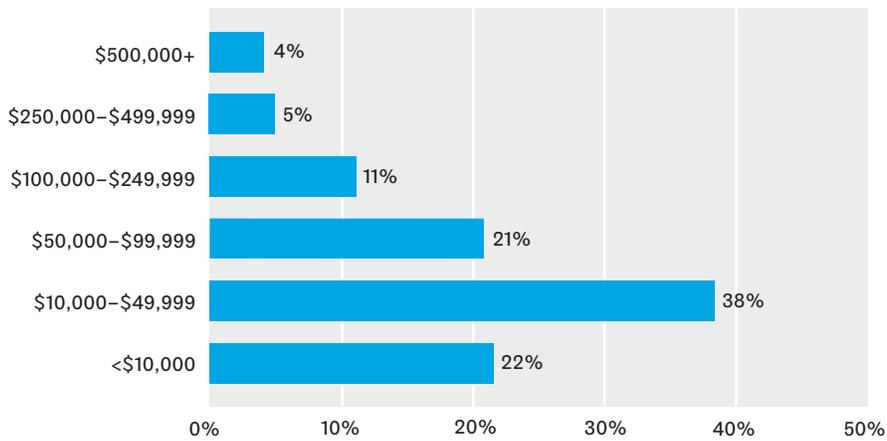


Figure 44. Percent of Racial and Ethnic Festivals, by Total Expenses During Last Season



Snapshot: Theater Festivals

- Number of festivals in national survey to self-describe as theater festivals: 53

Audience Characteristics

- Most common age of audience members: 45 to 54
- 55% female
- 85% Caucasian, 10% African American
- 11% Hispanic

Festival Characteristics

- Most often held in July
- Most common venue: outdoor theater (69% of festivals)
- Percent of festivals that last 1–3 days: 10%
- Percent of festivals that occur once a year: 94%
- Percent of festivals with 100 or more performers: 20%
- Percent of festivals that are free: 39%
- Of festivals that charge, percent that charge under \$10: 4%
- Of festivals that charge, percent with a free or reduced ticket program: 96%
- Percent of festivals with audience size under 1,000 (Figure 45): 6%
- Percent of festivals with audience size under 10,000 (Figure 45): 49%

Programming

- Most common type of theater performed at theater festivals (Table 10): Shakespeare (78% of theater festivals)

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 46): 35%
- Percent of festivals that expect lower revenue next season: 11%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 47): 36%

Table 10. Types of Theater at Theater Festivals
(multiple answers allowed)

Type of Event	Percent of Festivals
Shakespeare	78%
Historical theme	24%
Musical theater	20%
Child audience	10%
New work	8%
Plays by the same author	8%
One-act plays	4%
Workshops/play readings	4%
International theater	2%

Figure 45. Percent of Theater Festivals, by Total Audience Size

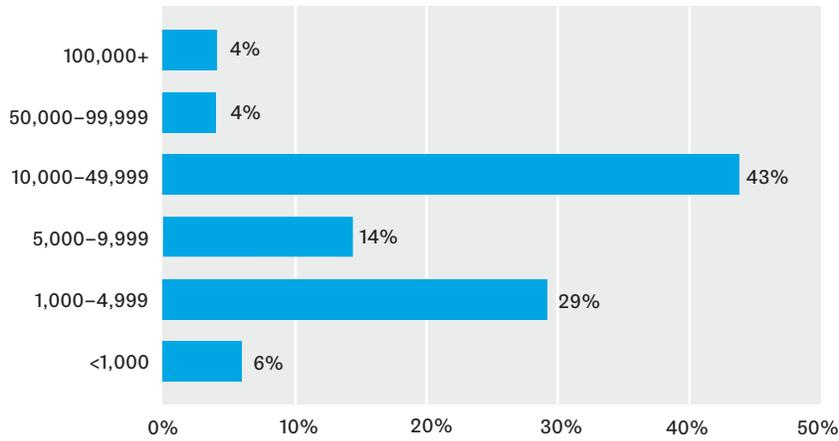


Figure 46. Percent of Theater Festivals, by Total Revenue During Last Season

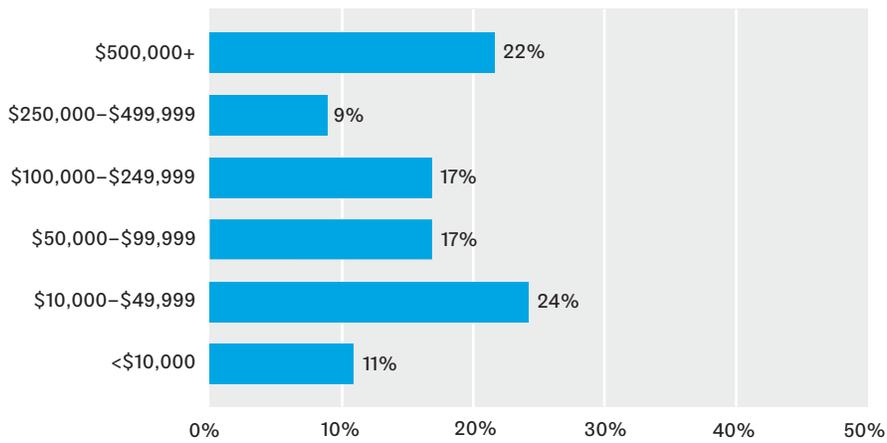
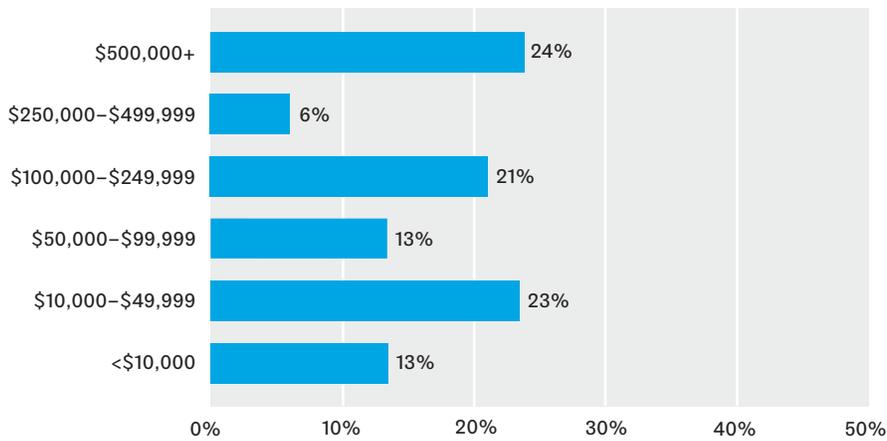


Figure 47. Percent of Theater Festivals, by Total Expenses During Last Season



Snapshot: Visual Arts Festivals

- Number of festivals in national survey to self-describe as visual arts festivals: 96

Audience Characteristics

- Most common age of audience members: 45 to 54
- 58% female
- 82% Caucasian, 9% African American
- 14% Hispanic

Festival Characteristics

- Most often held in September
- Most common venue: public plaza or park (46% of festivals)
- Percent of festivals that last 1–3 days: 83%
- Percent of festivals that occur once a year: 94%
- Percent of festivals with 100 or more exhibitors: 45%
- Percent of festivals that are free: 80%
- Of festivals that charge, percent that charge under \$10: 62%
- Of festivals that charge, percent with a free or reduced ticket program: 70%
- Percent of festivals with audience size under 1,000 (Figure 48): 19%
- Percent of festivals with audience size under 10,000 (Figure 48): 64%

Programming

- Most common type of visual arts at visual arts festivals (Table 11): Painting (88% of visual arts festivals)

Financial Information

- Percent of festivals that generate under \$50,000 in revenue (Figure 49): 68%
- Percent of festivals that expect lower revenue next season: 23%
- Percent of festivals that incur less than \$50,000 in expenses (Figure 50): 69%

Table 11. Types of Visual Arts at Visual Arts Festivals (*multiple answers allowed*)

Type of Event	Percent of Festivals
Paintings	88%
Sculpture	86%
Photography	84%
Drawings	80%
Ceramics	74%
Metalwork	74%
Glass	72%
Textiles	67%
Printmaking	60%
Digital media	50%
Miscellaneous crafts	35%

Figure 48. Percent of Visual Arts Festivals, by Total Audience Size

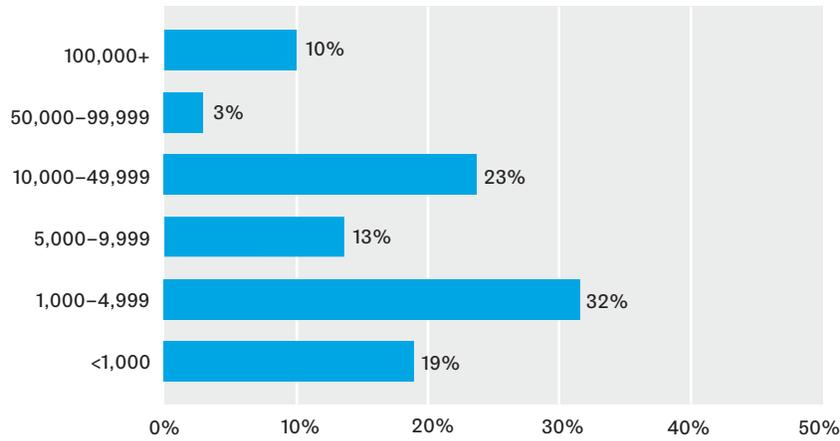


Figure 49. Percent of Visual Arts Festivals, by Total Revenue During Last Season

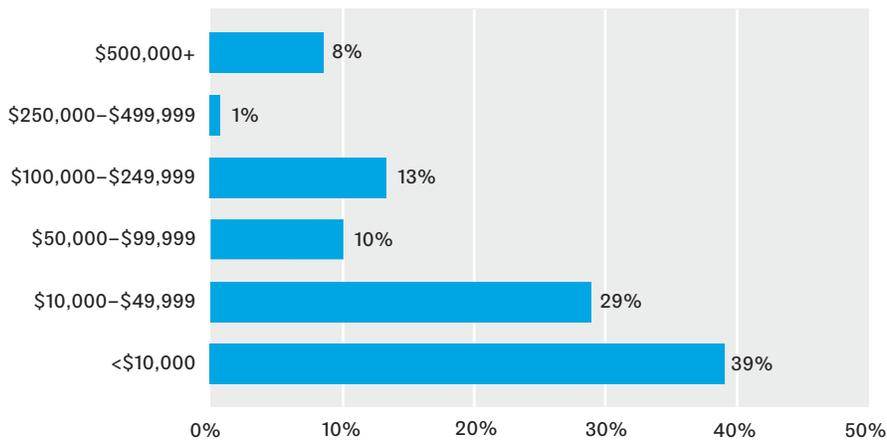
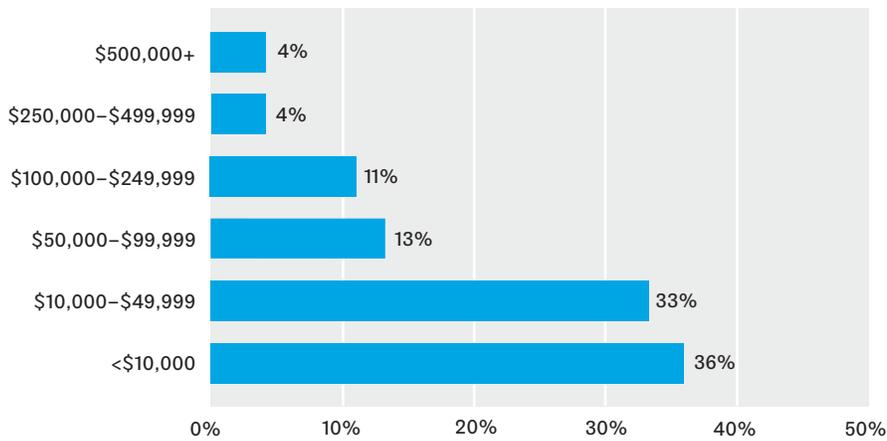


Figure 50. Percent of Visual Arts Festivals, by Total Expenses During Last Season



Conclusions

Outdoor arts festivals distinguish themselves from other arts venues and events in a variety of ways, all conducive to building local arts audiences.

- By offering arts programming in multiple genres and art forms, festivals have the potential to appeal to Americans of all backgrounds, as shown by audience statistics.
- The open, accessible spaces in which festivals occur—as well as their low- or no-cost admissions policies—contribute to an informal, family-friendly environment where artists and audiences can interact, enhancing the aesthetic and social experience for both groups.
- Although outdoor arts festivals occur in communities of all sizes, the majority of festivals captured by this survey take place in small and mid-sized towns. Most festivals have occurred in those communities for more than a decade.
- The heavy reliance of festivals on a few paid staff and more volunteers is yet another indicator that festivals, in many cases, are woven into community life. The benefits are reciprocal: community members report a strong sense of civic pride associated with festivals, and most festivals rely on local government and business support to operate from season to season. They also require the provision of basic municipal services.

Although festivals from 49 states participated in the NEA survey, the results cannot be viewed as nationally representative. Still, an analysis of the 1,413 surveyed festivals and the seven case study festivals identified the above characteristics. It is hoped that this research will provide a platform for greater awareness and documentation of a phenomenon that is vital to our understanding of how Americans participate in the arts.

Research Methodology

The study used a mixed-methods approach consisting of a national survey and seven case studies. The national survey collected quantitative information from a broad array of festivals and is a good starting point for understanding many characteristics of the outdoor arts festivals across the country. The case studies, on the other hand, yielded a rich bank of qualitative information as well as some quantitative information and provide a more in-depth understanding of what happens behind-the-scenes. The two approaches complement each other in the types of information they generated (national survey—quantitative; case studies—qualitative and quantitative) and their generalizability (national survey—generalizable to the population with some limitations; case studies—not generalizable). This report combines key results from the two investigative efforts, described in further detail below.

I. NATIONAL SURVEY

Compilation of Survey Universe

The first step toward the nationwide survey was to create the survey universe by compiling the names of outdoor arts festivals in the United States. No comprehensive listing of U.S. outdoor arts festivals currently exists. Silber & Associates and the NEA worked together on this, drawing from a number of sources to create the list. Silber & Associates focused on the nation's 10 largest metropolitan areas, obtaining their events calendars, conducting extensive Internet searches of their public events, and contacting Departments of Recreation and Parks, municipal organizations, and other relevant organizations.

The NEA drew from its grantee and applicant database⁴⁹ as well as worked with the regional arts organizations, state arts agencies, state festival and event associations, and arts service organizations to identify or reach organizations that host festivals. The following organizations assisted the NEA in its efforts by either providing the NEA the names and contact information of grantees, applicants, or members that host festivals or by distributing the survey link to their members:

American Folk Festival Association*

Americans for the Arts*

American Museum Association*

Association of American Museum Directors*

Association of Performing Arts Presenters

Arts Midwest

Arts Northwest

Chamber Music America*

Dance USA*

International Council of Fine Arts Deans*

International Festivals & Events Association

International Music Festival Conference & International Film Festival Conference*

League of American Orchestras*

Literary Network*

Mid Atlantic Arts Federation

National Assembly of State Arts Agencies

National Council for Traditional Arts

National Guild of Community Schools for the Arts*

New England Foundation for the Arts

Opera America*

South Arts

State Arts Agencies: Alabama, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Hawaii, Idaho, Illinois, Indiana, Iowa, Kentucky, Louisiana, Massachusetts, Maine, Maryland, Michigan, Mississippi, Minnesota, Missouri, Montana, North Carolina, Nevada, New Mexico, New Hampshire, New York, Ohio, Oklahoma, Pennsylvania, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia, Washington, Wyoming

State Festival & Event Associations: Arkansas, California/Nevada, Colorado, Florida, Indiana, Kentucky, Louisiana, Michigan, Minnesota, Missouri, Montana, North Carolina, Ohio, Oklahoma, Oregon, South Carolina, Tennessee, Texas, Virginia, Washington, West Virginia

Theatre Communication Group*

Western Arts Alliance

World Music Coalition*

*Organizations distributed the survey to their members directly (versus giving the NEA their member list).

In an effort to be as comprehensive as possible, the project team assembled a list of festival-producing organizations in addition to festivals. Initially the list of festivals and organizations contained over 10,000 entries. After scrubbing the list of obvious duplicates, which occurred as a consequence of overlap between source lists, the master list reduced to roughly 8,000 entries. Silber & Associates contacted the 8,000 entities and requested their participation in the festival survey.

During the course of the survey it became apparent that the list was a rough inventory at best. Indeed, many of the 8,000 entities were not festivals or festival-producing organizations at all but were vendors who support festivals, such as caterers and equipment rental companies. In addition, despite extensive scrubbing, the list still contained a number of duplicate entries (i.e., a festival listed multiple times with slight variations in the name). Furthermore, the list likely omitted festivals that simply were not known to local governments or arts associations.

Over 2,400 festivals and festival-producing organizations of the 8,000 who were contacted visited the survey website, but only half (52% or 1,264) met the screening criteria for this study (see below). The 1,264 respondents to the survey reported on a total of 1,413 outdoor arts festivals.

Information Provided to Participants About Privacy

Survey participants were informed in all survey correspondence and at the survey website about how their survey responses would be treated. Participants were told the information they provided would be combined with responses from other festival organizers and reported in group form only, and that their responses would not be reported individually or identified by name. In addition, the open-ended comment area of the survey carried an additional admonition to participants not to identify themselves or their festival by name unless they wished to be identified.

Screening Criteria

The research team came up with two screening criteria that provided a practical and meaningful definition for this research, though other definitions clearly exist. The criteria were that (1) arts and/or culture programming is a core part of the festival's activities, and (2) at least half of the events are held outdoors. Two questions measuring these criteria appeared at the introduction to the survey website, and a festival had to meet both criteria to enter the site.

Response Rate

Several issues precluded the calculation of a survey response rate. The first was the quality of the survey universe, as described above, which prevented an accurate count of potential survey participants—the denominator for calculation of a response rate. The second factor was that the study design allowed for “opt-in” participation. Any outdoor arts festival organizations that learned of the survey, even if they were not on the original survey list, could go to the website and participate. Again, this factor precluded calculation of a response rate, but the flexibility afforded by this method aligned with one of the study's goals: to approximate a census of the nation's outdoor arts festivals.

Lacking a survey response rate, the researchers tried to determine the extent, if any, to which the survey was biased by non-response. Thus, the study included an online mini-survey of 200 festivals. Silber & Associates randomly identified 200 festivals in the survey universe as mini-sample participants and rigorously followed up by telephone to encourage their participation. Ultimately, 148, or 74%, participated in the mini-survey.

Silber & Associates concluded from the mini-sample that in general the study did not suffer from significant non-response bias. The opt-in nature of the study, however, most likely increased participation of larger festivals relative to smaller ones. This conclusion is based on the finding that 24% of the mini-sample, compared with 13% of the full sample, reported audience sizes of 1,000 or less; 25% of the mini-sample, compared with 16% of the full sample, had 25 performers or less; and 49% of the mini-sample, compared with 31% of the full sample, had 10 or less scheduled performances. All these differences are statistically significant.

Nonetheless, the “opt-in” effect does not appear to have made much impact on other audience demographics,⁵⁰ giving the research team confidence that the survey results are reasonable estimates of the survey universe.

The survey sample of 1,264 respondents is a non-probability sample because it was not randomly selected from the population of outdoors arts festivals. This means that the extent to which the 1,264 respondents accurately represent the population of all U.S. outdoor arts festivals is not known. It's quite possible that the “opt-in” feature of the survey biased the sample in the direction, for instance, of profitable festivals eager to share information on their success. The nonprobability nature of the sample limits the generalizations that can be made from this study and precludes the use of sampling errors to describe the accuracy of population estimates.

In general, most survey participants answered the survey completely, with only slight variation in the

number of missing responses per question. The questions on audience members' race and ethnicity were an exception, however. About 40% of the sample did not answer them, most likely because the information was not readily available.

Survey Questionnaire

The questionnaire was designed to address NEA's research goals and questions. It consisted of approximately 40 closed-ended questions, many with multiple parts, arranged in six sections measuring:

- Festival background (type, schedule, location)
- Festival characteristics (disciplines, audience composition)
- Festival staff (curator, number)
- Revenue, plus sponsorships and donations
- Expenses
- Organizational characteristics

Prior to the survey, Silber & Associates pre-tested the questionnaire on seven festival administrators that represented a broad cross section of the festival community. They gave feedback about questionnaire length, item clarity, response choice availability, and overall impressions of the questionnaire, and their input led to slight revisions to the questionnaire content.

The project team felt confident that virtually all festivals and festival-producing organizations have Internet access and decided on an online survey because of its accessibility and ease of use. A paper-and-pencil survey was initially considered but rejected because of its cost. Silber & Associates posted the questionnaire to its secure website at the URL address www.festival-survey.com. Entry to the site was password-protected. For respondents who produced more than one festival, the website allowed him or her to answer the questionnaire multiple times, once for each festival produced. One respondent looped through the survey site six times, describing six different festivals, and another, five times. More typically, however, respondents answered the questionnaire only once.

Online Data Collection

Data collection began September 7, 2009, with a pre-survey notice sent first-class through postal mail. At the same time, the same pre-survey notice was sent by e-mail. Both methods were used in the event that one address or the other was incorrect.⁵¹ The pre-survey notice informed the respondent of the upcoming survey. Several days later, Silber & Associates emailed a survey invitation with instructions for participating. One week later, a reminder was emailed, followed by a second electronic reminder the next week. The survey concluded October 31, 2009.

Silber & Associates had traditional mailing addresses and not e-mail addresses for about 19% of the universe. Silber & Associates sent this group a hard copy survey invitation in addition to the hard copy pre-survey letter. Because of budget constraints, this group did not receive a follow-up reminder. Thus the small group without e-mail addresses received less aggressive follow-up.

Data Analysis

The survey data were downloaded from the survey website to an Access database and then imported into SPSSv16 for analysis. Analysis was primarily descriptive in nature and consisted of frequency distributions and calculation of means. A correlation coefficient was computed to study the relationship between audience size and number of artists, and confidence intervals were computed to compare characteristics of the mini-sample to the full sample.

II. CASE STUDIES

Selection of Case Study Festivals

Festivals were chosen according to a series of criteria, including geography and setting, organizational characteristics, and disciplines presented. Selections also were responsive to festival producers, arts administrators, grant givers, and others knowledgeable on arts festivals⁵² (see box), who nominated festivals for consideration. Rather than attempting to choose examples that were in some way "representative" of the enormous diversity of festivals in the U.S., the research team strove to ensure that the set of examples did not have any important or obvious gaps.

The process for selecting festivals was as follows:

1. Gather suggestions for festivals to consider as research sites.
2. Categorize festivals by NEA region.
3. Within regions, assess each festival based on primary criteria of governance structure, price, and mission.
4. Note balancing criteria.
5. Produce a final list using deciding criteria.

Primary selection criteria included geographic region and a set of specific organizational characteristics that reflected the study's research focus.

Geography: One festival was selected from each of the six regions represented by the regional arts organizations: Arts Midwest (IA, IL, IN, MI, MN, ND, OH, SD, WI), Mid-America Arts Alliance (AR, KS, MO, NE, OK, TX), Mid Atlantic Arts Foundation (DC, DE, MD, NJ, NY, PA, VA, VI, WV), New England Foundation for the Arts (CT, MA, ME, NH, RI, VT), South Arts (AL, FL, GA, KY, LA, MS, NC, SC, TN), and Western States Arts

Practitioners Consulted on Study:

Michael Alexander	Ann Hitchcock	Aaron Paley
Jo Ann Andera	Phil Horn	Anthony Radich
Barry Bergey	Jody Kuh	Ted Russell
Tina Betz	Bruce Labadie	Steve Schmader
Rebecca Blunk	Mitch LeDay	Debra Simon
Gerri Combs	Jennifer Lena	John Simon
Alan Cooper	Ethan Lercher	Leni Sloan
Terrence D. Jones	Barbara Lippman	Huong Vu
Dan DeWayne	Maria Lopez De Leon	Andrea Wagner
David Fraher	Rory MacPherson	Jack Walsh
Sandra Gibson	Mary McCabe	Phil Walz
Sam Gilmore	Tom McClimon	M.K. Wegmann
Dara Gordon Schmoyer	Julie Olin	Tim Wilson
Karen Hanan	Michael Orlove	Robb Woulfe

Federation (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY).

Key organizational characteristics: Festivals were selected to represent what the research team thought might prove key distinctions among festivals:

- Governance structure (private vs. public-private partnership)
- Price (free vs. fee-based/ticketed)
- Explicit mission outside arts presenting (no vs. yes)

We also included balancing criteria to ensure that the set of festivals we studied reflect the diversity of festivals in the U.S. These balancing criteria included discipline and setting.

Discipline: The case study festivals represented the disciplines supported by the NEA: performing arts, visual arts, folk/traditional arts, media arts, literature, and design.

Setting: The NEA serves communities with cultural infrastructure in a range of sizes and capacities. The case study sites represented this range and included festivals that serve urban and rural populations, city-wide and neighborhood audiences, and popular and community-specific art forms.

Finally, we used two deciding criteria to ensure that our work was tenable and reflected existing expert, field-based knowledge about festivals. These deciding criteria included organizational capacity and responsiveness.

Capacity: To participate in the study, festival organizers needed to demonstrate that the festival was at least five years old; they needed to commit to providing expert knowledge about the festival, and to coordinating administrative support and volunteer labor.

Responsiveness: Because this study is exploratory, we believed that the set of sites selected should be responsive to expert knowledge of the field. The sites selected were drawn from suggestions received from festival

producers, arts administrators, arts grantmakers, and other arts and festivals experts consulted on the study during an initial request for assistance conducted by the NEA. The list of festivals compiled using the above criteria was checked for any critical gaps in terms of characteristics of population served, artistic forms or styles presented, and other characteristics deemed relevant and important by the research team.

Field Research

The research team investigated each selected festival using a number of approaches, including background research on the festival-sponsoring organization and a one- to two-day field visit to the festival. Participant observation of the festival took place during this site visit. The principal investigator attended each festival for at least one full program day, visited the entire festival venue, and participated as an audience member in the broad range of programs. During the field visit, the research team conducted focus groups with artists and volunteers and conducted two surveys. A local site coordinator was designated by the festival organizer at each site to coordinate the field visit and other research activities

Background Research, Interviews, and Focus Groups

The research team performed extensive background research on each festival via web-based and archival reviews of internal organization documents. We also looked at materials provided by or identified by the organizations as being relevant or important to their history and mission. A detailed profile focusing on each festival's history, mission, and finances was compiled using these data.

The team conducted an interview of the festival

administrator and/or key festival personnel or board members via telephone at each of the seven sites. The interviews included questions about the festival's history, mission, audiences, fiscal health, administrative challenges, connections to community, and key partnerships in the public, not-for-profit, and commercial sectors.

The team also conducted two focus groups at each site, one with artists presenting at the festival and another with festival volunteers. Participants in the focus groups were selected by local coordinators at each festival based on experience of the festival, artistic discipline, and availability. Most focus groups consisted of eight to 10 participants. The purpose of the focus groups was to learn about artists' and volunteers' reasons for involvement in the festival, and their perceptions of arts and festival audiences, artistic experiences, and the local community.

Surveys

The research team, with the help of the local site coordinator and festival staff, conducted two surveys at the festival. The purpose of these surveys was to collect data on the basic demographic characteristics and arts activities of audiences at the festivals. (Local support staff were trained in the proper methods for distributing the two surveys, and a detailed manual outlining survey procedure was distributed to each assistant.) Each survey was available in both English and Spanish.

The **Festival Participant Survey** contained 10 questions asking festival participants (people attending the festival) about demographic characteristics, such as gender, age, race, ethnicity, and income. The research team provided each festival with 320 survey forms⁵³ to distribute at four separate places and times during the festival. To distribute these surveys, survey assistants worked in pairs⁵⁴ and systematically gave a questionnaire to every 10th person⁵⁵ who passed a designated distribution area.

The **Special Programs Participant Survey** contained 16 questions asking festival participants (people attending the festival) about: 1) the kinds of arts activities they engage in and how often they do so; 2) their experiences at the festival; and 3) basic demographic characteristics, such as gender, age, race, ethnicity, and income. The research team gave each festival a total of 100 survey forms⁵⁶ to distribute at four separate places and times during the festival (25 forms at each location). In most venues, survey forms were placed on every nth seat at an event or performance. In venues where seating was not available, survey assistants distributed surveys at an entryway.⁵⁷

Data Analysis

Analysis of the quantitative data gathered for the case studies was descriptive. Analysis of the qualitative data was interpretative. Interview and focus group data were placed in a research template based on the interview and focus group protocols. Based on these completed templates, the principal investigator then identified key themes, responses that were common across sites, and areas of difference across sites.

Notes

⁴⁹ Applicants or grantees in FY 2007 and FY 2008 that characterized themselves or their projects as fairs or festivals were contacted for the purpose of the survey.

⁵⁰ The mini-sample and overall sample did not differ on the basis of gender, race, ethnicity, organizational structure, or number of employees.

⁵¹ The pre-survey letter sent via postal mail provided the survey URL and password. That way, if the e-mail address was incorrect, the survey participant still had instructions for participating.

⁵² Individuals were identified in coordination with Mario Garcia Durham, the Director of Presenting and Artist Communities at the National Endowment for the Arts.

⁵³ This was the number of surveys it was feasible to distribute with the resources available to this study.

⁵⁴ Partners stood facing one another with room for at least one person to pass. As one partner distributed a survey, the other partner began counting until nine people had passed and then that partner gave a questionnaire to the 10th person who passed. Survey assistants continued this process, alternating distribution until they had finished distributing 40 surveys each.

⁵⁵ If the 10th person declined to take the document, the survey assistant marked the survey with an "X" and placed it in the receptacle with completed surveys.

⁵⁶ This was the number of surveys it was feasible to distribute with the resources available to this study.

⁵⁷ If a person declined to take the questionnaire, the assistant marked the survey with an "X" and placed it in the receptacle with completed surveys.

Annex

National Survey Questionnaire

WELCOME PAGE

Thank you for participating in the National Endowment for the Arts' Survey of Outdoor Arts Festivals. This is an historic attempt to collect information about outdoor arts festivals and the role they play in our nation's cities, towns, and neighborhoods. The results will be used to characterize the number and variety of outdoor arts festivals in the United States, the artists they employ, and the communities they serve. The findings will be shared with festival organizers, policy-makers, civic leaders, and the general public to give a detailed and accurate picture of the field.

The information you provide will be combined with responses from other festival organizers and reported in group form only. Your responses will **not** be reported individually or identified by name. We greatly appreciate your help with this important study.

The survey takes an average of 13 minutes to complete. If you are unable to complete the survey in one session, please click on **'Finish Later'** at the bottom of the page you are completing. Your answers will be saved and you can return to the site the same way you entered today. The site will place you on the last page you completed. Once you have completed your survey, you must click **'Submit Survey'** to submit it.

Should you encounter any problems, please contact the NEA's survey consultant, Silber & Associates, by email at help@SAsurveys.com or toll-free at 1-888-745-2371.

Verification

According to our records, your organization is _____. Is this correct? **yes/no**

[If no]:

Please provide correct information for our records.

Organization: _____

Our records show that your organization runs the _____ festival. Is this correct? **yes/no**

[If no]:

Does your organization currently run a festival? **yes/no** [If no, site goes to exit page*]

Please provide the correct name of the festival for our records.

Festival name: _____

Our records show that the festival is held in _____. Is this correct? **yes/no**

[If no]:

Please provide the correct city/town for our records.

City/town: _____

Zip code of city/town: _____

*Exit page text:

Thank you for your willingness to answer the National Endowment for the Arts' Survey of Outdoor Arts Festivals. Because you indicated that your organization does not currently run a festival, our questions do not apply to you. We thank you for taking the time to let us know.

Screening Questions

A. Do you consider the [specific name] festival in [location] to be an **arts** and/or **cultural festival**?

- Yes
- No
- Not sure

B. When the [specific name] festival in [city/town] was held most recently, approximately **what share** of events was held outdoors? *If the festival is being held for the first time, answer based on your plans.*

- 100% (all outdoors)
- 75%–99%
- 50%–74%
- 25%–49%
- 1–24%
- 0% (all indoors)

For those who did not pass the screening questions and are routed out of survey:

Please tell us—in your own words—your organization’s **purpose** for holding the **festival**, and/or the **benefit** the festival brings **to the community**. For instance, the purpose might be to share a particular style of music with audiences, to raise funds for a specific cause, or to improve cultural understanding or community relations. *Please do not provide your name or the name of your festival in your comment unless you want to be identified.*

Thank you for taking the time to participate in the National Endowment for the Arts’ Survey of Outdoor Arts Festivals. Your contribution to this important study is greatly appreciated!

For those who passed the screen:

In what year was [festival name] held most recently?

- 2009
- 2008
- 2007
- 2006
- 2005
- Other: _____

As you answer the survey questions, please respond with the **festival’s most recent season in mind**.

Please note that the term *festival* may refer to a festival or other outdoor program whose name does not necessarily include the term festival.

Festival Background

Q1. We realize that many festivals have numerous dimensions and purposes. Which of the following **festival types** describe yours best? *Choose all that apply.*

- Anniversary or Commemorative
- Arts and Crafts
- Bazaar
- Carnival
- Charity Event
- Children/Family
- Community Networking
- County Fair/State Fair
- Dance
- Education
- Festival Linked to an Official Holiday
- Film
- Food Festival
- Fringe
- Historical Theme (e.g., Renaissance)
- International
- Literary
- Mardi Gras
- Mummers Festival
- Music
- Performing Arts
- Racial/Ethnic Heritage
- Religious
- Theater
- Visual Arts
- Other: _____

If more than one response to Q1:

Q1a. Now please choose the one best description of your festival.

- Multidisciplinary
- Anniversary or Commemorative
- Arts and Crafts
- Bazaar
- Carnival
- Charity Event
- Children/Family
- Community Networking
- County Fair/State Fair
- Dance
- Education
- Festival Linked to an Official Holiday
- Film
- Food Festival
- Fringe
- Historical Theme (e.g., Renaissance)
- International
- Literary
- Mardi Gras
- Mummers Festival
- Music
- Performing Arts

- Racial/Ethnic Heritage
- Religious
- Theater
- Visual Arts
- Other: _____

Q2. For how many years has **your organization** produced the [specific festival] in [specific town/city name]?

- This is the first time.
- 1 year
- 2–4 years
- 5–9 years
- 10–20 years
- More than 20 years
- Don't know

Q3. For how many **years** has the **festival** been **held** in [specific town/city name] or vicinity? Include times when the festival was **held by any organization**, not just yours.

- This is the first time.
- 1 year
- 2–4 years
- 5–9 years
- 10–20 years
- More than 20 years
- Don't know

Q4. During the most recent season, in what **venue(s)** was the festival held? If the festival is being held for the first time, answer based on your plans. *Check all that apply.*

- Community center
- Concert hall, theater, or performing arts center
- Municipal fairgrounds
- Museum or gallery
- Outdoor theater (amphitheater, shell, bandstand, etc.)
- Place of worship
- Private grounds, such as an estate or camp
- Public building or estate
- Public plaza or park
- Restaurant, hotel or club
- School or college
- Sports venue
- Street
- Waterfront or pier
- Other: _____

Q5. What is the **duration** of the festival (the **total number of days of programmed festival activities**)? If the festival is being held for the first time, answer how many days are scheduled.

- 1 day
- 2–3 days
- 4–7 days
- 8–15 days
- 16–30 days
- 31–90 days
- 91–180 days
- More than 180 days

[If answer above is more than 1 day]:

Q5A. Is the festival held on **consecutive days** (days in a row), or does it take place on a schedule of **nonconsecutive days**, such as once a week, once a month, or various days scattered throughout the season?

- Consecutive days
- Non-consecutive days
- Other: _____

Q6. What is the festival cycle? In other words, **how often** does it **occur** in [specific town/city name] or vicinity?

- Once a year
- Twice a year
- Every other year
- Once every few years
- This is the first time it's being held here.
- No definite schedule
- Other schedule: _____

Q7. In what **month(s)** is the festival **typically** held? If the festival is being held for the first time, answer when it's scheduled to take place this year. *Check all that apply.*

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December
- It varies significantly from year to year (i.e., change of season).

Q8. Approximately how many **people live** in [specific community, city, or town]?

- Under 1,000
- 1,000–9,999
- 10,000–49,999
- 50,000–99,999
- 100,000–249,999
- 250,000–499,999
- 500,000–1,000,000
- Over 1,000,000
- Don't know

Characteristics of the Festival

We're interested in learning about the **arts disciplines** and **types of events** at the [specific name] festival in [location].

Q9. With the most recent season in mind, what kinds of **arts disciplines** make up the festival? *For multidisciplinary festivals, check all that apply.*

- Dance
- Film
- Folk and traditional arts
- Literary (for example: spoken word, poetry, etc.)
- Music
- Theater
- Visual arts, including arts and crafts
- Other: _____

Q10. What **proportion** of the festival is **made up** of events in each of the following **disciplines**? Approximations are fine, but the percentages should total 100%.

Music	_____ %
Film	_____ %
Literature	_____ %
TOTAL	100%

We'll show follow-up questions (A through G) for any kind of event that makes up at least 20% of the festival, based on responses to Q10.

A. What is the main type of **dance** event at the festival? *Check all that apply.*

- Ballet
- Contemporary
- Hip-Hop
- Jazz Dance
- Modern Dance
- Traditional/Folk Dance
- World/Ethnic Dance
- Other: _____

B. What is the main type of **film** screened at the festival? Check all that apply.

- Actor retrospectives
- Animated
- Classic feature
- Director retrospectives
- Documentary
- Genre-specific film (action, comedy, mystery, etc.)
- Historical
- International
- New feature
- Short
- Other: _____

C. What is the main type of **folk and traditional arts** event at the festival? *Check all that apply.*

- Crafts and visual arts
- Culinary arts
- Dance
- Music
- Oral traditions (storytelling)
- Puppetry
- Theater
- Other: _____

D. What is the main type of **literature** event at the festival? *Check all that apply.*

- Children's literature
- Fiction
- Non-Fiction
- Poetry (including poetry "slams" and spoken-word)
- Publishing
- Translation
- Other: _____

E. What is the main type of **music** performed at the festival? *Check all that apply.*

- Bluegrass
- Blues
- Broadway Musicals or Show Tunes
- Classical or Chamber Music, Symphonic/Orchestral
- Concert Band or Marching Band
- Contemporary or Alternative Rock
- Country
- Folk/Traditional
- Hymns or Gospel Music
- Jazz
- Latin, Spanish, or Salsa
- Lounge, DJ, Electronica
- Opera
- Polka
- Rap or Hip-Hop
- Rhythm and Blues
- Rock and Pop music (includes Classic Rock or Oldies and Contemporary or Alternative Rock)
- World
- Other: _____

F. What is the main type of **theater** event at the festival? *Check all that apply.*

- Child audiences
- Historical themes
- International theater
- Mime
- Musical theater
- New work
- One-act plays
- Plays by the same author
- Playwright contests
- Puppetry
- Shakespeare
- Workshops or play readings
- Other: _____

G. What is the main type of **visual arts** at the festival? *Check all that apply.*

- Ceramics
- Crafts (miscellaneous)
- Drawings
- Digital media
- Glass
- Metalwork
- Paintings
- Photography
- Printmakings
- Sculptures
- Textiles
- Other: _____

Q11. Are the visual arts juried or not?

- Juried (some or all)
- Not juried (none are juried)
- Don't know

Q12. Does your festival have **formal educational** activities or programming, such as lectures, artist demonstrations, and classes?

- Yes
- No
- Don't know

Q13. Which **age** group makes up the **largest group** of festival attendees? *If precise information isn't available, please estimate. Check all that apply.*

- 0–6 years
- 7–12 years
- 13–17 years
- 18–24 years
- 25–34 years
- 35–44 years
- 45–54 years
- 55–64 years
- 65–74 years
- 75 and up

Q14A. Please estimate the **ethnic** make-up of your festival audience.

- _____ % Hispanic or Latino
- _____ % Not Hispanic or Latino
- Don't know

Q14B. Please estimate the **racial** make-up of your festival audience

- _____ % American Indian or Alaska Native
- _____ % Asian
- _____ % Black or African American
- _____ % Native Hawaiian or other Pacific Islander
- _____ % White
- _____ % Two or more races
- Don't know

Q15. Please **estimate** the **gender** make-up of your festival audience.

- % Male
- % Female
- Don't know

Q16. What was the festival's **total attendance** for the most recent **season**? If this is the first time the festival is being held, answer how many people you expect to attend.

- Under 1,000
- 1,000–4,999
- 5,000–9,999
- 10,000–49,999
- 50,000–99,999
- 100,000–500,000
- Over 500,000
- Don't know

Q17. Approximately **how many artists perform** or **exhibit** at the festival? This includes anyone who is performing or displaying at the festival. If the festival is held over non-consecutive days, such as every Sunday in the summer, give the **combined number of artists who perform during the season**. For a **group performance**, such as a symphony, **count each artist in the group**. A symphony, for instance, might include 40 artists. **Count multiple appearances** by the same artist only **once**.

- 1–24
- 25–49
- 50–74
- 75–99
- 100–249
- 250–399
- 400–600
- Over 600
- Don't know

Q18. Over the course of the festival, how many **scheduled performances** take place, in total? Include performances such as concerts, plays, and dance performances but do not include unscheduled performances. Count a **double-bill** as **two** performances.

- None
- 1–9
- 10–19
- 20–29
- 30–39
- 40–49
- 50–100
- Over 100
- Don't know

Q19. Over the course of the festival, how many workshops, lectures, or other educational events are scheduled to take place, in total?

- None
- 1–9
- 10–19
- 20–29
- 30–39
- 40–49
- 50–100
- Over 100
- Don't know

Festival Staff

Q20. Please indicate the **approximate total number** of paid and unpaid **staff** who work on the festival **year-round** (i.e., during the festival and off-season too), including **volunteers**. Please count all staff, including administrative staff, festival production staff, and IT staff. Please do **not** count contracted services such as printing and marketing.

Number of **paid** year-round staff who work **full-time** _____

Number of **paid** year-round staff who work **part-time** _____

Number of **unpaid** staff _____

Don't know

Q21. Please indicate the **approximate total number** of paid and unpaid **seasonal workers** (i.e., people who work during the festival only). Please do **not** count contracted services such as printing and marketing.

Number of **paid** seasonal workers who work **full-time** _____

Number of **paid** seasonal workers who work **part-time** _____

Number of **unpaid** seasonal workers _____

Don't know

Q22. Does the festival have an artistic staff, staff person, or volunteer whose primary role is **arts curator** or **arts event programmer**? This can be full-time or part-time staff.

Yes

No

Don't know

Revenue

We'd like to know how the festival is **funded** and the **revenue** it generates. Please answer based on the festival's most recent season.

Q23. Do you **charge admission**?

No, all events are free.

Yes, we charge admission to **all** events.

Yes, we charge admission to **some** events, and some events are free.

Other: _____

#1. When the [festival name] was held most recently, what was the **average admission fee** for an **adult** to enter the festival?

Under \$5

\$5.00–\$9.99

\$10.00–\$14.99

\$15.00–\$19.99

\$20.00–\$29.99

\$30.00–\$39.99

\$40.00–\$49.99

\$50.00 or more

#2. Does your organization have a formal program in place to distribute free tickets or sell tickets at a **reduced price**?

Yes

No

Don't know

Q24. When the festival was held most recently, approximately how much **revenue** did it **generate**? *Include all sources of revenue but do not include in-kind donations.*

- Less than \$10,000
- \$10,000–\$24,999
- \$25,000–\$49,999
- \$50,000–\$99,999
- \$100,000–\$249,999
- \$250,000–\$499,999
- \$500,000–\$999,999
- \$1,000,000–\$1,999,999
- \$2,000,000–\$5,999,999
- \$6,000,000–\$10,000,000
- Over \$10,000,000
- Don't know

Q25. Please identify the sources of **festival revenue**. *Check all that apply.*

- Admission fee or event ticket sales
- Sale of food, soft drinks, and merchandise
- Sale of beer and alcohol
- Parking fees
- Vendors paying a participant fee
- Cash donations collected at event
- Corporate sponsors
- Income from advertisers
- Foundations
- Private donors and patrons
- University sponsor
- Unearned income, such as interest on investments and endowments
- Governmental support (municipal, state, or federal)
- Other: _____

Q26. Approximately what **percentage** of the festival's total **revenue** comes from ticket sales, food sales, merchandise sales, parking, and other **income** generated by the **people who attend**?

- 1–24%
- 25–49%
- 50–74%
- 75–100%
- Don't know

NEWQA. Compared to the revenue generated by the festival in its **most recent season**, do you think **next year** the **revenue** will be much higher, somewhat higher, the same, somewhat lower, or much lower?

- Much higher
- Somewhat higher
- The same
- Somewhat lower
- Much lower
- Don't know

NEWQB. How, if at all, will the **lower revenue affect** the way you present the **festival next season**? *Choose all that apply.*

- Decisions about the festival will not be affected by the reduced revenue.
- Reduce the number or kind of performances
- Reduce the number of days the festival occurs
- Reduce the number of employees or contracted services
- Reduce artist fees

- Reduce the number of paid artists
- Charge an entrance fee for the first time
- Increase the entrance fee
- Change the venue to one lower in cost
- Increase efforts to obtain grants and donations
- Other: _____

Expenses

We'd like to know the **expenses** the festival incurs. Please answer based on the festival's most recent season.

Q27. When the festival was held most recently, approximately what were **the total expenses**?

- Less than \$10,000
- \$10,000–\$49,999
- \$50,000–\$99,999
- \$100,000–\$249,999
- \$250,000–\$499,999
- \$500,000–\$999,999
- \$1,000,000–\$1,999,999
- \$2,000,000–\$5,000,000
- Over \$5,000,000
- Don't know

Q28. When the festival was held most recently, approximately what were the **artist fees paid** to all artists combined? Exclude in-kind payments in your estimate.

- Artists were not paid.
- Under \$10,000
- \$10,000–\$29,999
- \$30,000–\$49,999
- \$50,000–\$74,999
- \$75,000–\$99,999
- \$100,000–\$249,999
- \$250,000–\$500,000
- Over \$500,000
- Don't know

Q29. When the festival was held most recently, did the festival **provide lodging, food, or travel** to any artists **in lieu of cash payment**? If yes, what was the approximate **total value**?

- Artists did not receive lodging, food, or travel in lieu of payment.
- Under \$10,000
- \$10,000–\$29,999
- \$30,000–\$49,999
- \$50,000–\$74,999
- \$75,000–\$99,999
- \$100,000–\$249,999
- \$250,000–\$500,000
- Over \$500,000
- Don't know

Sponsorships and Donations

Q30. During your most recent fiscal year, from which of the following **sources**, if any, did your **festival receive funds**? *Check all that apply.*

- None. The festival has not received any sponsorship money or donations.
- Corporate Sponsorship
- Foundations
- Local or Municipal Government
- State Government
- Regional Funders
- Federal Government

If more than one selection is made:

Q30A. From which of these do you receive the largest proportion of sponsorships or donations? Choose only one answer.

- Corporate Sponsorship
- Foundations
- Local or Municipal Government
- State Government
- Regional Funders
- Federal Government

Q31. If your festival received **in-kind donations** during the most recent fiscal year, what kind(s) did you receive? *Check all that apply.*

- None. The festival has not received any in-kind donations. (If this box is checked, respondent can't check other answers in the list)
- Airfare/Transportation
- Flowers/hospitality items
- Food
- Hotel
- Information technology services, such as website development
- Landscaping
- Marketing/Advertisements
- Office equipment
- Photography/documentation
- Printing
- Production support
- Security
- Venue
- Other: _____

Your organization

These questions are about the **organization** in charge of the festival.

Q32. We'd like to understand the **structure** of your **organization**. Which of the following statement is/are true? *Check all that apply.*

- My organization is not for-profit.
- My organization is part of a university.
- My organization is part of a municipal, state, or federal government agency.
- My organization is for-profit.
- Other: _____

Q33. Does your **organization present** festivals **other** than the [festival name] and if yes, how many?

- No, my organization does not present any other festivals.
- Yes, my organization presents _____ other festivals.
- Don't know

Q34. How many **FTEs** (full-time equivalents) does **your organization employ**? Include **all parts** of the organization, not just the office or division in charge of the festival.

- 5 employees or less
- 6–9 employees
- 10–29 employees
- 30–49 employees
- 50–100 employees
- Over 100 employees
- Don't know

Q35. Please tell us—in your own words—your organization's **purpose** for holding the **festival**, and/or the **benefit** the festival brings **to the community**. For instance, the purpose might be to share a particular style of music with audiences, to raise funds for a specific cause, or to improve cultural understanding or community relations. *Please do not provide your name or the name of your festival in your comment unless you want to be identified.*



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