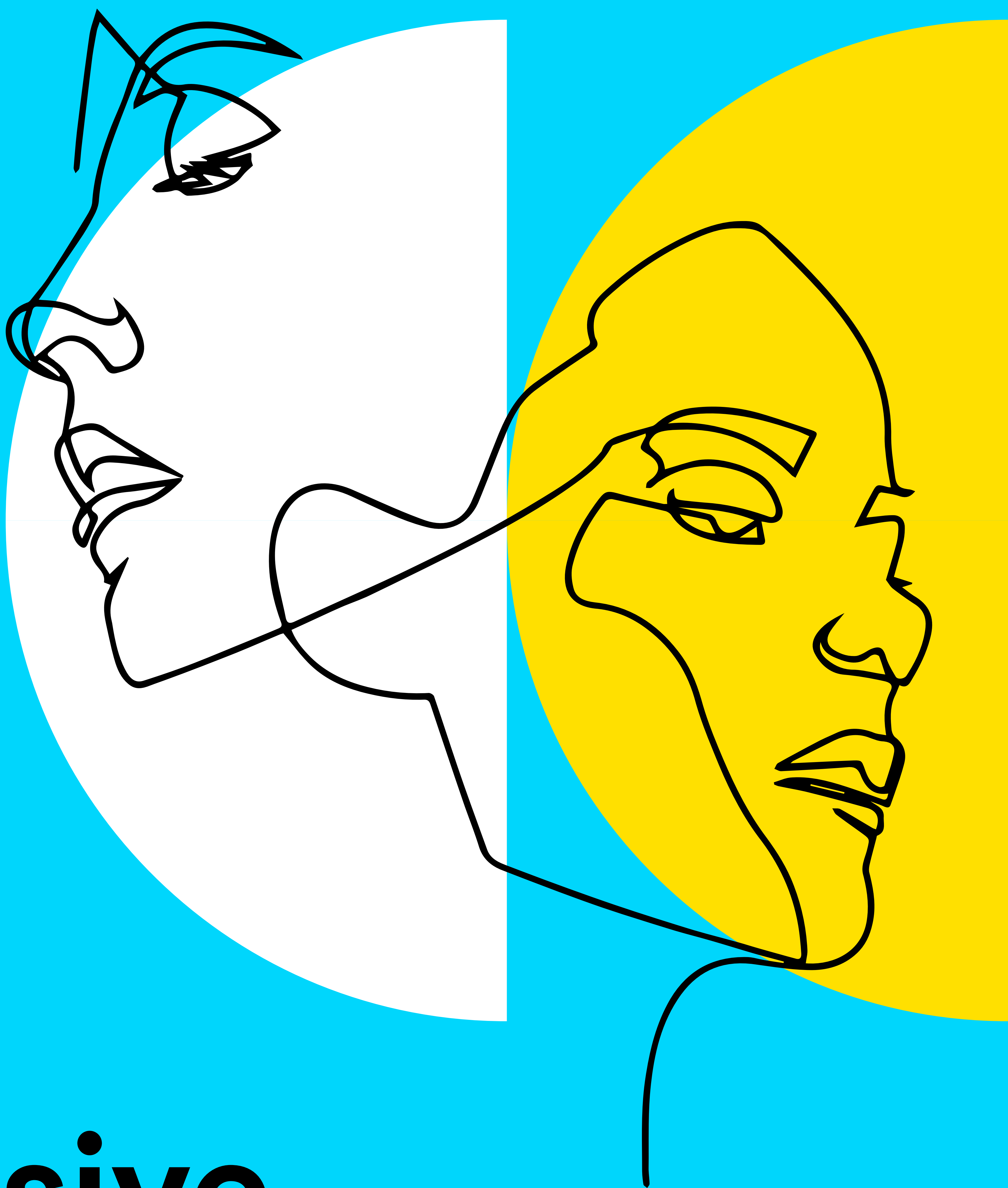
Immersive
Experience
Network



Immersive Audience Report 2024

www.immersiveexperience.network

Immersive Experience Network

Chapters

Immersive Experience Network

The Immersive Experience Network

The Immersive Experience Network (IEN) is a collaborative community established in 2022, to support the growth of the live/location-based immersive experience (LIE) sector in the UK and beyond. Our mission is to be a catalyst for immersive creators, facilitating the sharing of knowledge, experience, and best practice between creators at all career stages, who are producing work across artistic and commercial roles and along the full spectrum of the immersive genres.

The Immersive sector is an emerging cultural and commercial entity, and when the IEN was founded one of the biggest gaps that we recognised was the lack of research and accessible data that could be used to underpin commercial decisions, develop marketing strategies, and support funding applications. Despite data collected as part of the [Cultural Participation Monitor] around the wider Creative and Cultural Industries (CCI) sector there has been a scarcity of specific, freely accessible immersive industry and audience insights.

We know there are silos of data held by some of the larger entertainment companies working in the sector along with data held by ticketing companies & marketing agencies, but this is understandably proprietary information and unavailable to the wider sector. We firmly believe that publicly accessible data will be key to building a secure and sustainable future for the LIE sector, and this report is part of a long term program to contribute towards it.

Our vision is to build a community that can come together to commission research jointly, which can then be published to aid the growth of the immersive sector; in the UK and beyond. Essentially crowd-funding research for the benefit of the community. We have already been fortunate to have had the support of a grant from the ESRC and the University of Birmingham, which funded our first report "In Your Own Words", which was published in April 2023. That report has already been instrumental in providing the insights that have shaped the direction of IEN since and we are in the process of collecting feedback to establish its value to the wider live immersive community.

Through the support of our industry partners, and in collaboration with Medea, we've been able to produce this inaugural Audience Report which we hope will be first of a series of annual reports which will track the growth and development of the emerging immersive experience sector.

Inaugural Immersive Experience Network Summit 2022 - Photo: Dom Martin

Why do this research?

The Crystal Maze LIVE Experience, © Little Lion Entertainment

This research is about the audiences who go to live immersive experiences. It's about what they enjoy and what affects their choices on what they go to. It's about what else they are interested in, how they assign value to those interests, and it's about what platforms they use to find out about new experiences. Individually, creators likely have a sense of their own audiences but this report is the first comprehensive mapping of the overall picture of the live immersive experience sector's audiences.

For established creators, it would be fascinating to know if this research aligns with your own data, experience and market research? Our hope is that the insights provided in the report will enhance your current understanding of your potential audience's behaviour, perspectives, and spending habits, but also offer a deeper understanding of ways in which to firm up your relationship with your established audiences and discover routes to opening up your work to new audiences. We hope that it'll spark some inspiration that can be applied to future experiences, and potentially ask some questions which you haven't thought of before.

For emerging creators, we hope that this provides some useful data points that you can leverage as evidence for investor decks as well as funding or grant applications. We hope that it provides some thought provoking insights into what audiences think they want from an immersive experience - whilst remembering that often the most interesting work often subverts those expectations.

For creators making work to enact social change, or artistic work targeting a specific audience, we hope this report offers some useful data points about how to best find and engage with the audiences you want to reach.

For brands, agencies and marketeers, we hope this offers some insights into the audiences currently engaging with immersive work, and provides some inspiration for potential collaborations with immersive makers.

There is so much variety within the immersive sector that there will inevitably be a variety of audiences within each immersive genre. Our personal experience of the immersive sector has been that audiences vary hugely between different shows and experiences with a key factor being the content of the show or experience. This is especially true of shows that utilise known Intellectual Property (IP) like a film or TV show where we've found that the demographic of the audience can be radically weighted to the IP's audience, and often provides many people's first foray into the immersive sector.

Therefore we know this report isn't going to be definitive, not everyone who comes to your experience will fit into these profiles but by collating a large data sample of nearly 2,000 respondents from across the UK, we hope you find some useful insights.

But what is immersive?

The rise and fall of the term "immersive" has been a symptom of the growth of the sector in the last two decades, both in the UK and globally. Practically every genre and style of work in some capacity pre-dates the use of the word itself, and as the sector landscape expands, both creators and audiences can see the term "immersive" as too familiar to have any meaning left.

> "In recent years, the "immersive" buzzword has been used to describe everything from wildly imaginative live experiences to high-tech toilets. While the word's effectiveness in marketing has been dwindling from broad-reaching overuse, its importance as a principle of design both within and outside of the entertainment industry cannot be understated."
>
> *Immersive Industry Report 2019*

In our first report In Your Own Words in April 2023, we began to get some insight into the ways that creators describe their work, both within the sector and externally, to audiences, press, and partners. *"There's kind of a marketing arms race in immersive,"* said one immersive producer in a focus group for the report, *"everything wants to list itself as immersive."* A sense that the word has lost its impact in a crowded marketplace is contrasted by the fact that it is still by some distance the most ubiquitous word in marketing and dialogue between creators and audience. In last year's research, when asked to use 5 words to describe their work, the most popular words were still "immersive", "interactive" and "experiential", by some distance.

This Immersive Audience Report builds a complementary perspective to the **'In Your Own Words'** creators report; this time looking inwards into the sector from audience participants. We asked our audience sample, 'What do you think when something is described as Immersive?' to understand where their view aligns with and diverges from what the makers of these experiences might be aiming for.

Eliminating 'immersive' from the earlier dataset as the definition in question, there is a strong correlation between the highest level words in both this year's audience survey and last year's creator survey. Audiences most strongly identify immersive with sensory engagement, participation, and dynamic action, as well as with the broader idea of immersive as an experience - rather than a form of cultural entertainment that's witnessed or absorbed from a seat.

The most commonly expressed sentiments by audience respondents were being *"part of the show and not just a spectator"*, including the unpredictability that this could lend to a narrative, and a sense of authenticity, *"to feel like I'm experiencing it for 'real'"*.

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We asked our audience sample ‘**What do you think when something is described as Immersive?**’

Audience survey

Word	Relevance	Count
experience	1	86
fun	0.63	51
audience	0.58	46
sense	0.51	40
show	0.49	38
interactive	0.35	25
good	0.28	18
event	0.26	16
action	0.25	15
audience participation	0.23	11

Creator survey

14	interactive
11	experiential
5	game
3	storytelling
3	design
2	puzzles
2	multi-sensory
2	engaging
2	dynamic
2	creative

While the audience focus on multi-sensory and participatory forms is promising for understanding the immersive sector beyond the word itself, it may also suggest a risk of inertia when productions market themselves outside of these well-understood definitions. In the discussion of immersive genres further down in this report, we begin to look at the interest and value that audiences place on different genres based on their key characteristics.

The audience data also demonstrates a strong weight on fun or enjoyment in an immersive experience - although this does overlap with the inclusion of games and play across immersive genres, this may also suggest that audiences still identify immersive as a type of entertainment as opposed to a broader cultural or artistic offering which presents some challenges for those working within the socially engaged end of the spectrum and perhaps offers some useful insights that could be useful in the development of marketing strategies for more socially engaged practices.

Some responses when asked: “What do you think when something is described as Immersive?”

“The audience are involved in some way. You really feel part of the performance.”
“My expectation would be the experience is realistic as you feel like you are immersed in everything around you”
“I expect it to feel like I’m experiencing it for ‘real’, like there’s things around me enhancing my experience to make me feel like I’m in the experience.”
“I expect there to be a lot of lights, a lot of interactions with the audience and breaks of the fourth wall or on the other end a very detailed and contained and absorbing experience making you forgot about you yourself being the audience”
“Interactive and atmospheric”
“An environment where the person watching or attending feels like they are a part of it as if there/in it, usually with headsets or 3D experience”
“VR irl”
“Have real life actors”
“Include the audience and five senses”
“You can interact with the experience in a way that makes you feel like you are actually there”
“Feeling like u are part of the experience”

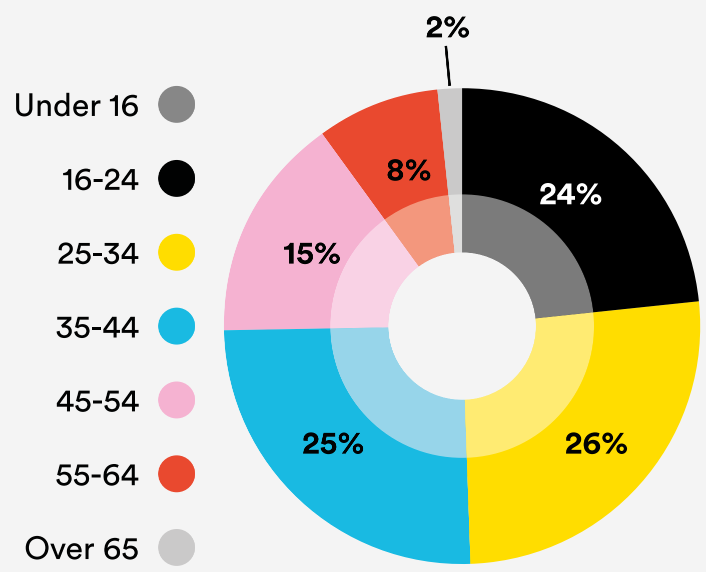
Immersive Experience Network

Who are our audience?

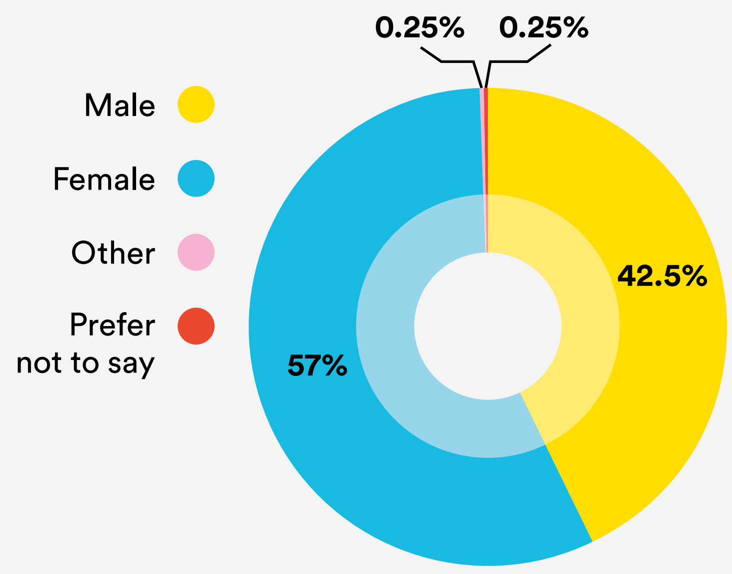
We worked with leading Market Research firm [Savanta](#) to generate the novel dataset that informs this report. We collected nearly 2000 survey responses from across the UK and tried to ensure a breadth of responses across the UK. Savanta surveyed across their general population database, to qualify a respondent had to have attended at least one immersive experience within the last 12 months.

Our survey offers us the first insight into who is visiting immersive work.

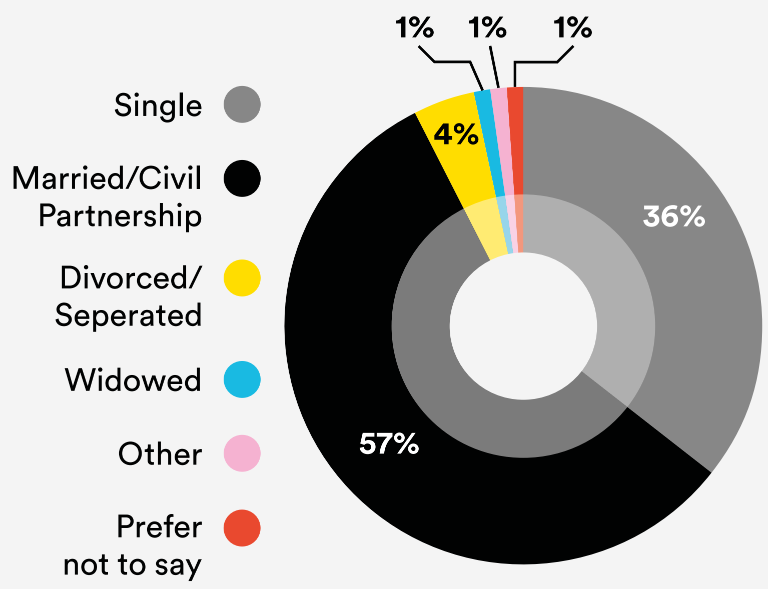
Age group



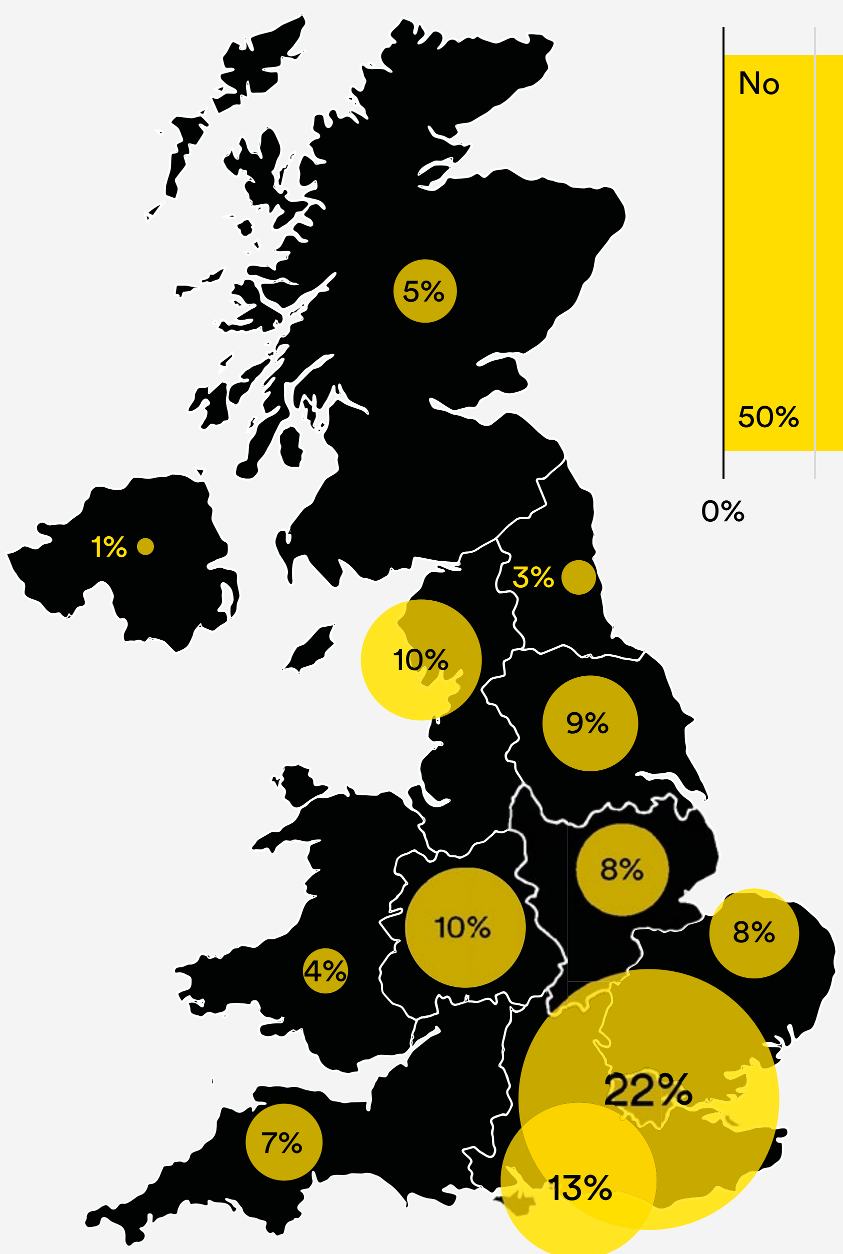
Gender



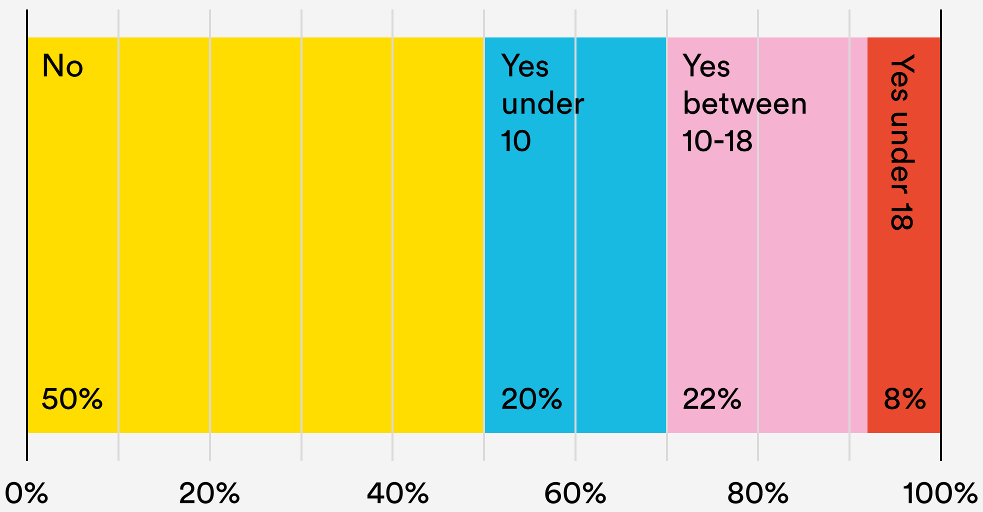
Family status



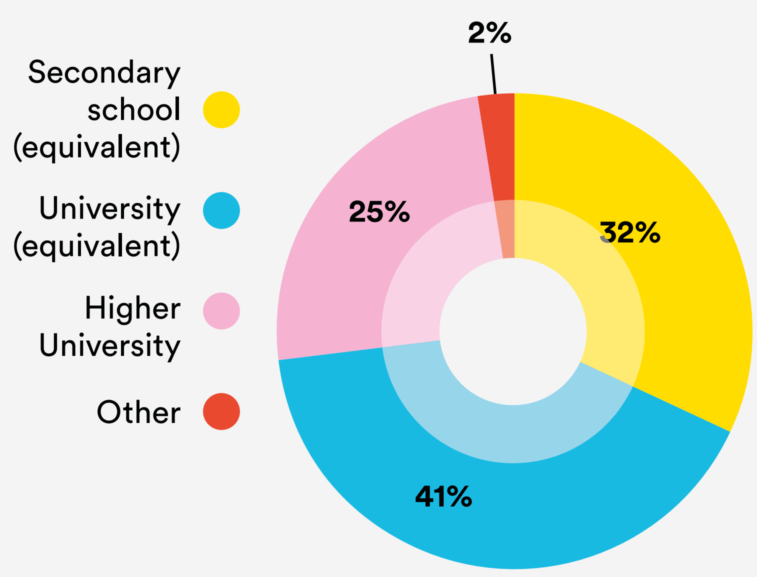
Regional location



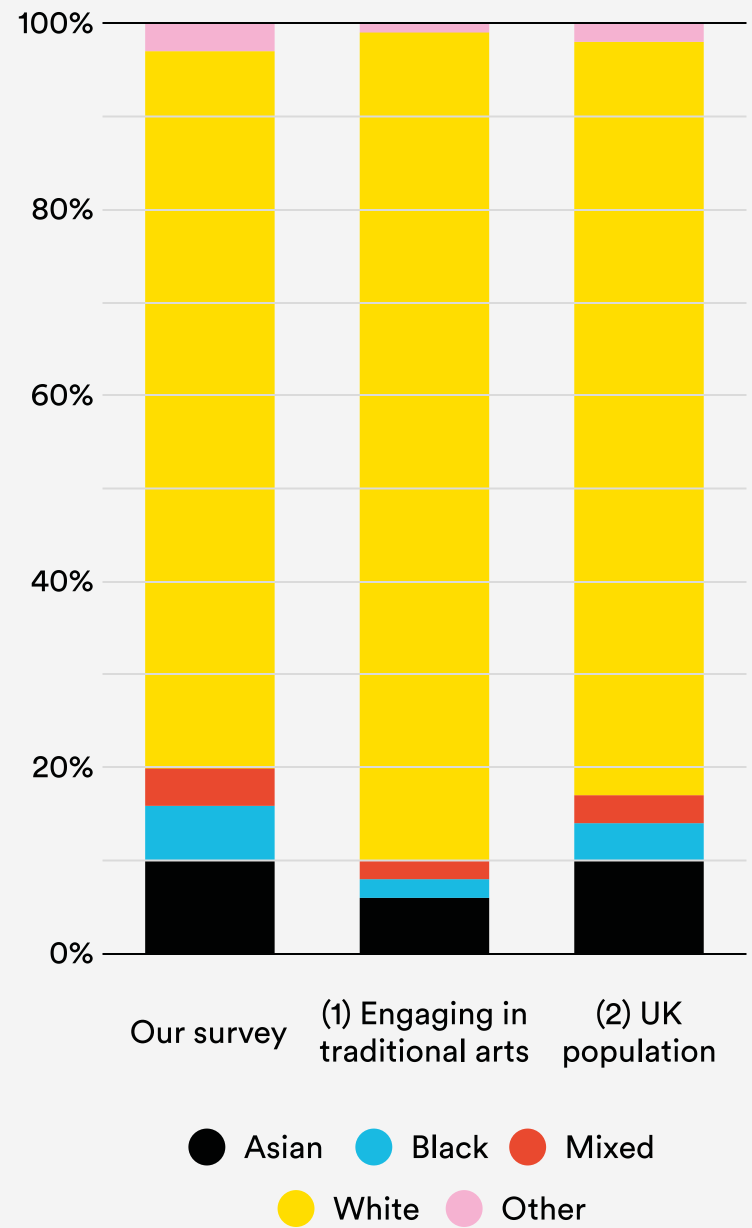
Children in household



Educational level



Ethnicity



Proportion of our survey sample's reported ethnicity compared to ethnic diversity of engagement in traditional arts and ethnic diversity of the UK population.

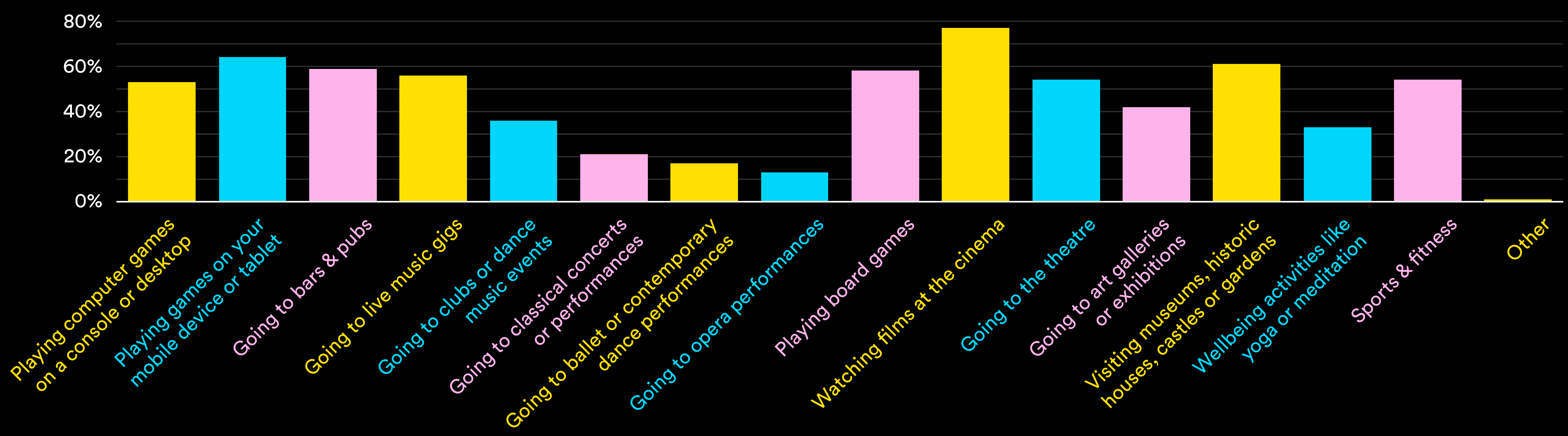
(1) Source - Participation in the arts, culture and heritage 2024

(2) Source - Diversity UK - UK Census data 2021

Our survey draws from a wide audience across age demographics and geographical locations, showing that there is a broad audience for immersive work, which is growing as more people are able to access it.

When comparing the demographic proportions of our audience sample to Participation in the Arts, Culture and Heritage, the data suggests that LIE engages a more diverse global majority demographic than more traditional cultural activities do. In fact, engagement with immersive is more aligned with the general population demographic than traditional cultural activities, which suggests that immersive experiences are managing to engage a relatively higher proportion of global majority than traditional arts, however we do not have data on household and disposable income therefore cannot speak to perceptions around elitism and class.

What other leisure activities do you enjoy?



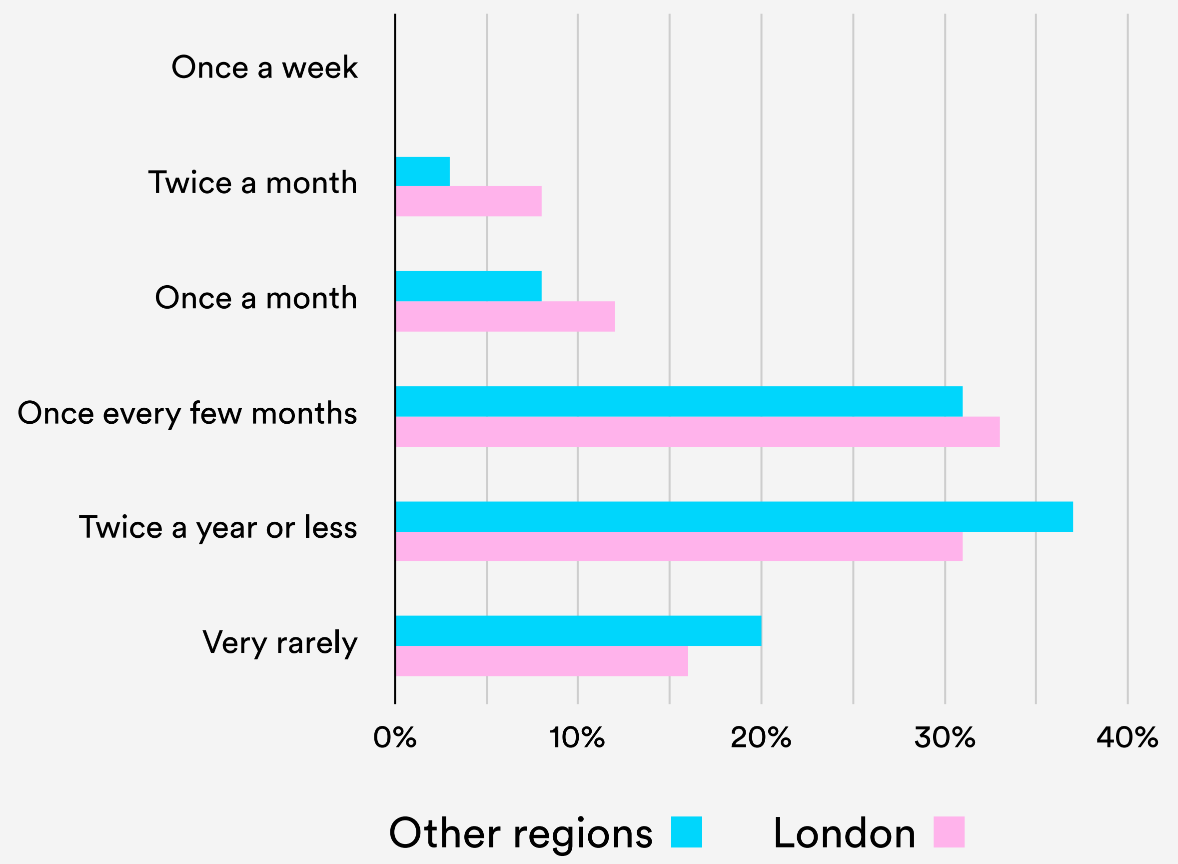
The live immersive sector spans across at least 10 recognisable cultural and commercial genres, which is reflected in the wide range of other leisure activities of immersive audiences. The data also reveals live immersive audience's strong connection with the wider cultural, creative and commercial sectors. The leisure activities reveal that there is desire to engage in game-based and narrative-driven activities, corroborated by the importance of fun and enjoyment in the audience's definition of immersive, but also demonstrates a desire to access leisure in sites and locations for social interaction.

There are perhaps opportunities here to look at the different activities and interests, and leverage some of the terms and language employed in the other cultural sectors to help us to connect more firmly with audiences to build expectations utilising common language shared across the various areas of interest.

Why do people go to Immersive Work?

We wanted to delve into our audience sample to try and determine more about them, and start to build up an informed picture of what audiences look for in an immersive experience and what their other interests are.

How often on average do you go to an Immersive experience?



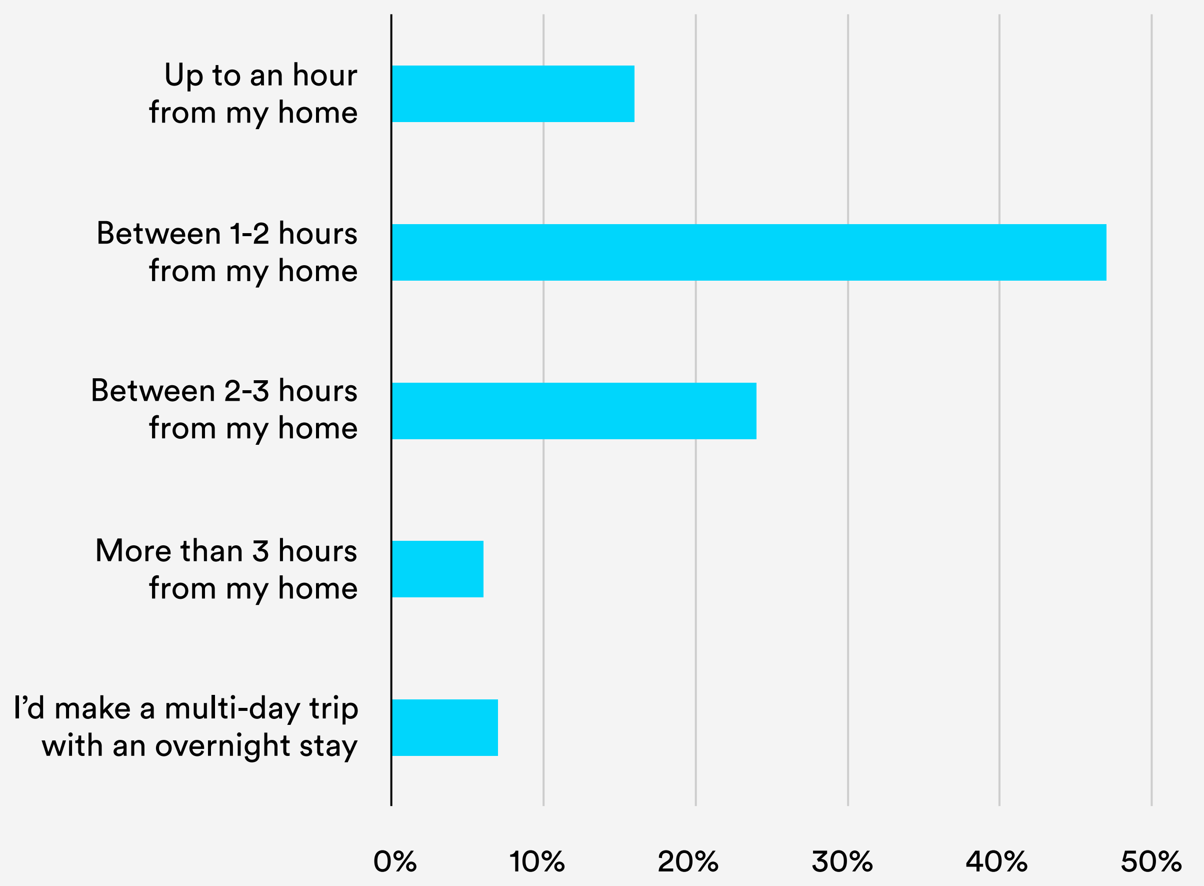
Going to immersive work is not something that the majority of our sample survey said they did regularly. This may well be down to the availability of experiences in the areas in which they live. Certainly respondents in London, where there are a larger number of experiences available, seem to go marginally more regularly. However, for many people it's still a 'special' occasion rather than a regular activity.

Our survey respondents also regularly engage with traditional cultural experiences, in fact more regularly than they do immersive work. The higher frequency could potentially be down to the wider range of traditional cultural experiences - many of them like art galleries and museums, often which are lower cost or free of charge, and don't require booking to access on offer compared to the number of immersive experiences. What is clear though is that there is a large overlap between audiences who enjoy culture and immersive work and suggests a broader patronage of arts, culture and communal social activity.

How often do you go to an immersive experience vs traditional cultural experience?

Traditional culture experiences include theatre shows, dance performances, art galleries, or museums

How far would you travel for an immersive experience?



We then asked our survey participants what factors are most important to them when deciding what to go and spend money on.

What factors are important when deciding what experiences to spend money on?

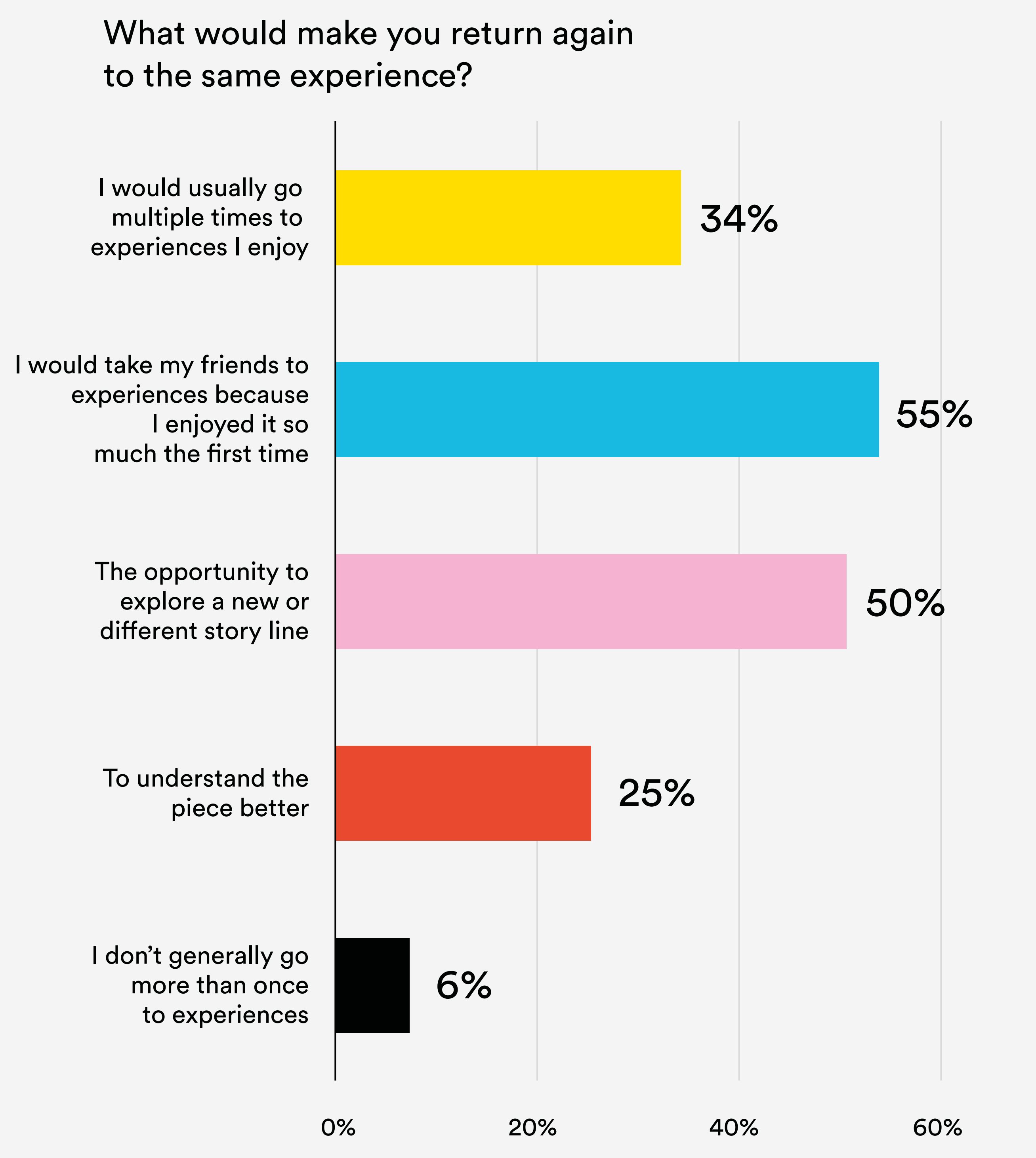
To try and help creators quantify potential audiences for their work, we asked people how far they are usually willing to travel to a piece of immersive work. We hope that this helps creators consider their marketing, and where potential audiences might be located outside of their immediate geographical location.

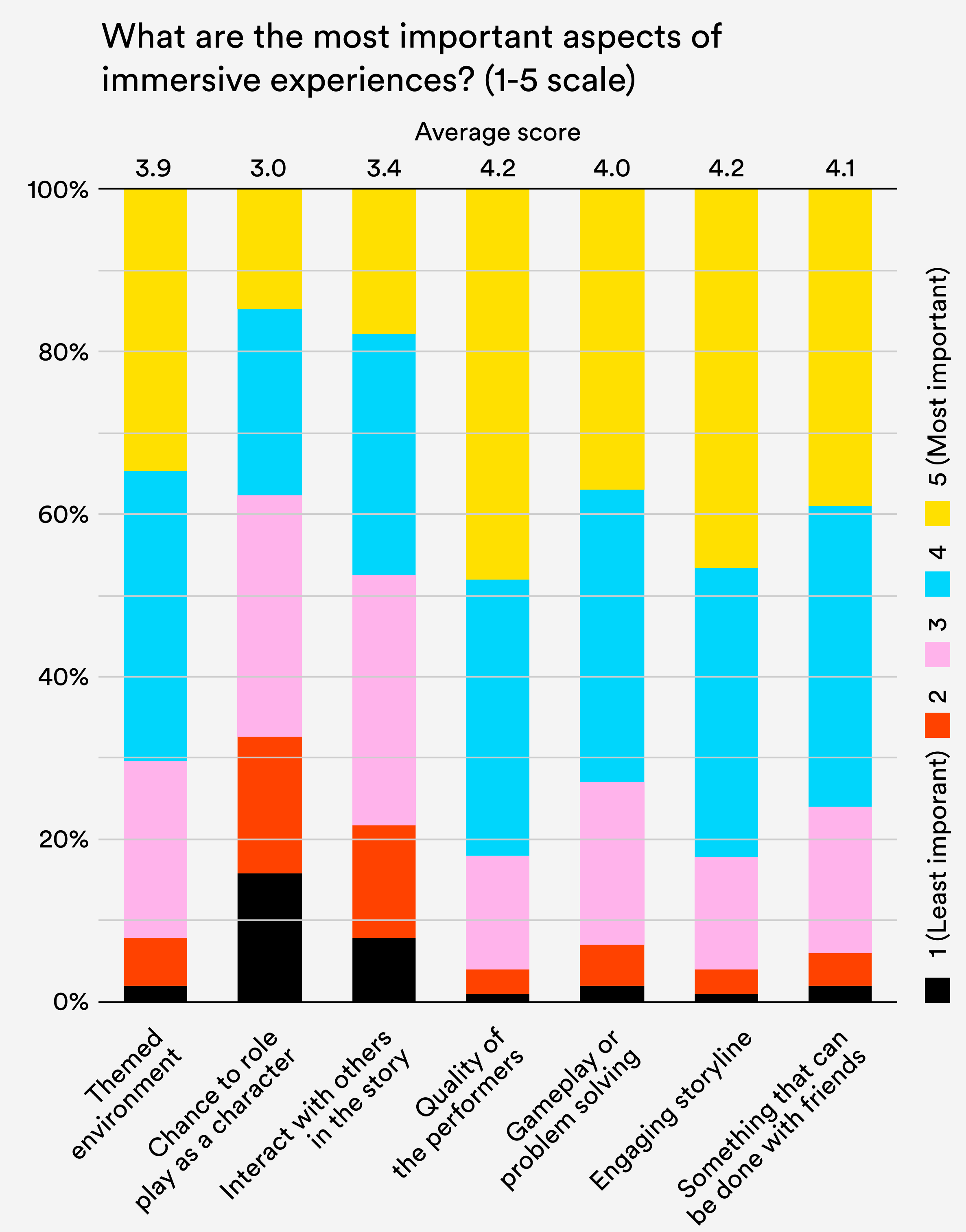
Maybe unsurprisingly in the current economic climate, the biggest factor was value for money. This is a challenge for creators at a time when so many of the costs involved in creating immersive work are rising making competitive ticket pricing a challenge. Arguably value for money doesn't necessarily mean low ticket prices, but the fact that it scores double the importance of cultural value with our survey respondents is noteworthy. In the following section, we look more closely at what our respondents considered value for different types of immersive experiences, including proposing some reasons why the spread of perceived value is wide across genres.

Closely following the experience being good value is the desire for experiences that can be communally enjoyed with friends. Being able to participate in a location-based, tangible experience with your friends is a key feature that immersive work particularly lends itself to.

Interestingly, despite the trend for a lot of immersive work to have extensive food & beverage offerings, the need for an experience to serve alcohol is not really a factor in our survey audience's decision to go or not. Arguably their enjoyment of the experience once they were there may be enhanced by a bar but not having one won't put the majority of our survey respondents off buying a ticket.

The importance of knowing the characters and stories from a TV show or film (eg. being based on existing Intellectual property or IP) and having heard of the company creating the work was both low for our survey respondents. Arguably that is positive news for new companies wanting to create original content as audiences expressed openness to it.





We asked our survey participants what would make them return to an experience, and again the opportunity to do it with their friends was a continuing trend. The ability to experience different versions of an immersive experience by following a different path or story track through it was also a draw.

There was a discussion at our [Writing* for Immersive] huddle about how immersive work could be made episodic to both creatively tell more complex stories but also encourage return visits, which is something immersive creators could consider.

We then asked our survey participants what the most important aspects of an Immersive experience was for them. Maybe it's unsurprising that themed environments, strong storylines, well designed interactivity and gameplay, all key ingredients of immersive work, were all high on the importance scale.

The quality of any performance or acting was valued with the highest importance underlining the need to ensure it's executed well if you are going to utilise it. Whilst it's not appropriate or required for every immersive experience, when live performance is incorporated it can become central to the audience's experience and enjoyment. Our data firmly locates performers/actors as a key asset within the overall production with the power to creatively elevate the experience, or diminish it if done badly.

Interestingly the chance to role play was generally less important than other aspects showing that whilst some audience members really enjoy that aspect, that enjoyment isn't universal. This may suggest that in an audience's perspective, feeling like a part of the story and being required to take on a role, or 'perform', are two different ideas. Immersion in a physical and emotional sense may be seen as separate from immersion in a behavioural sense - compelling narratives and aesthetic immersion are drawn into relief as central characteristics of a satisfying experience by this data.

Screamland Photo: Dik Ng

Why is this important and how could immersive creators use this information?

Experience Design

Many immersive creators may feel like they already instinctively know what their audience's priorities are and what's important to them. The insight that audiences want high quality performances is maybe not groundbreaking nor does it infer that all good experiences require performers, but if they are integral to the experience, then the quantifiable data from our survey shows that this is potentially an aspect they are least forgiving of when it's done badly.

Good performance takes investment in talented directors, actors and support teams who are given the appropriate time to rehearse and develop their work. Maybe more importantly, good consistent performances are given by performers who are well trained and looked after, sustainably paid and working on shift patterns that don't burn them out.

Audiences say it's the most important aspect of their enjoyment of immersive work which should make good performers amongst a producer's most valued assets. It also presents an opportunity for us to consider as a sector how we share best practice and build sustainable routes into immersive for performers, directors and writers.

As a sector we need to start a conversation about how we can best support the development of immersive performers and the craft of immersive performance. It is tangibly different from performing in other mediums like theatre or film and yet there isn't the same recognition in cultural circles or pathways for performers who are interested in developing those skills.

Ensuring there are 'fit for purpose' guidelines about pay, working conditions and welfare is also going to be a vital growth step in the development of the sector. It is also perhaps a call to action to develop some shared approaches and opportunities for performer training.

Audience interaction and accessibility

At the other end of the spectrum, the need to role play or be made to interact with other characters in an experience was less important for our survey audience. We believe this reflects both the breadth of work and the breadth of audiences now coming to immersive work. There may be an implicit finding in this data point into the proportion of the potential immersive audience for whom being made to interact could be a barrier to entry, potentially as an accessibility consideration for attending.

For some experiences, the discomfort of interaction is the creative tool that is being explored.

> "Some commentators have, however suggested that the increasing popularity of "getting theatregoers on stage", with "customer-actors [...] likely to become a more common sight" might contain within it potential challenges such as audiences feeling uncomfortable or unwilling to engage.
>
> This discomfort can, be theatrically very productive. Blast Theory and Hydrocracker's production of Operation Black Antler at the 2016 Brighton Festival, for example, used the blurring of boundaries between storytelling and reality to deliberately (and effectively) discomfort the audience."
>
> **Analysis of Theatre in England** - *Arts Council England*

For other experiences trying to reach wider audiences, as discussed both at our Marketing Huddle, and by Tom Maller (Creative Director for Immersive Octopus) at our Live Immersive Design Symposium, classifying audience members by their behaviour choices and comfort in an immersive experience can offer opportunities to design for and include a broader spectrum of potential audiences. There is a compelling design methodology becoming more broadly adopted from the world of theme park design, where creators are designing their work to be accessible to the broadest audience by building different ways for people to enjoy it. There are various metaphors utilised by different practitioners but a widely used example is that audiences can choose to be either paddlers, waders or swimmers.

Paddlers want to just dip their toes in the water of the experience, they'll love the themed environments but will often want to stand back and observe what's going on rather than actively engage with it.

Waders are a bit more engaged, they'll try and get into the narrative and maybe engage with performers or show teams but will generally not go all the way into the depth of the show.

Swimmers want to be able to go deep and fully immerse themselves in all aspects of the experience. They want to be in costume with a show persona and will try to explore all the threads of the story.

What our data shows is that if you are designing an experience to be accessible to the widest audience, then having role play and character engagement as an integral part of your experience may be challenging for people who would choose to engage with the show without it. This is perhaps also reflected in the desire to bring friends that this data has identified: if audiences come to experiences in a group, it will inevitably be a mix of paddlers, waders, and swimmers. The data perhaps prompts some reflection on the distinction between immersion and interactivity and the ways in which we use those terms in our marketing andaudience engagement.

Creators should consider how they can build layered story tracks so that paddlers can enjoy their experience as much as the swimmers can, therefore helping to ensure everyone has a positive and fulfilling experience regardless of how they interact with it.

As the difference between paddlers and swimmers is not always preference, but can be an accessibility consideration, it cannot be assumed that paddlers can simply become swimmers when they are comfortable enough with the environment - the most accessible experiences should therefore be designed with each type of audience in mind throughout, to be as inclusive as possible.

Furthermore, these options could be advertised to audiences in advance, to let them know that different levels of participation are available to them, meaning that potential audiences who may have been resistant to high levels of participation in previous immersive experiences are not deterred.

Wake The Tiger Photo: Soul Media

Marketing

This data should give immersive producers some insights into how best to market their experiences. We hope that by understanding what aspects of your experience your audience find most important could be useful to inform your marketing strategy.

A consistent problem that came up at our Marketing Immersive Experiences Huddle was the challenge of explaining to your audience what it is you are selling tickets for. It's hard to describe exactly what an immersive experience involves in a single poster image or digital ad headline especially when the term immersive is so ubiquitous.

If you have a small budget for digital ads for your new experience, then based on our data, experimenting with images and ad set copy that emphasises the gameplay, storytelling and communal aspects of your experience might be a good place to start.

Especially if you could utilise positive audience testimonials or feedback to give potential audience visibility of those aspects.

You could also include information on your website FAQs about the experience that may address the concerns of paddlers and waders when they are considering buying tickets.

If your experience doesn't require people to dress up or engage with characters unless they want to, then maybe include that in your website so people understand the level of participation, including any measures in place for audiences to make their chosen level of interactivity clear to performers once in the experience environment.

Bridge Command Photo: Alex Brenner

The Immersive Genres

The Immersive Genres

As we've touched upon earlier, in a world where the term immersive is so widely used, it's hard to know what actually qualifies as an immersive experience. Additionally, on its own, the overlap highlighted between immersive audiences and traditional cultural experience attendees may lend credence to the hypothesis that immersive is more a style of cultural work than it is its own sector. However, as we begin to dive more in this section into how the sub-categories of immersive are perceived by audiences, we believe there is a valid case in developing and communicating immersive to audiences as a defined form of cultural experience and a discreet sphere of the cultural landscape.

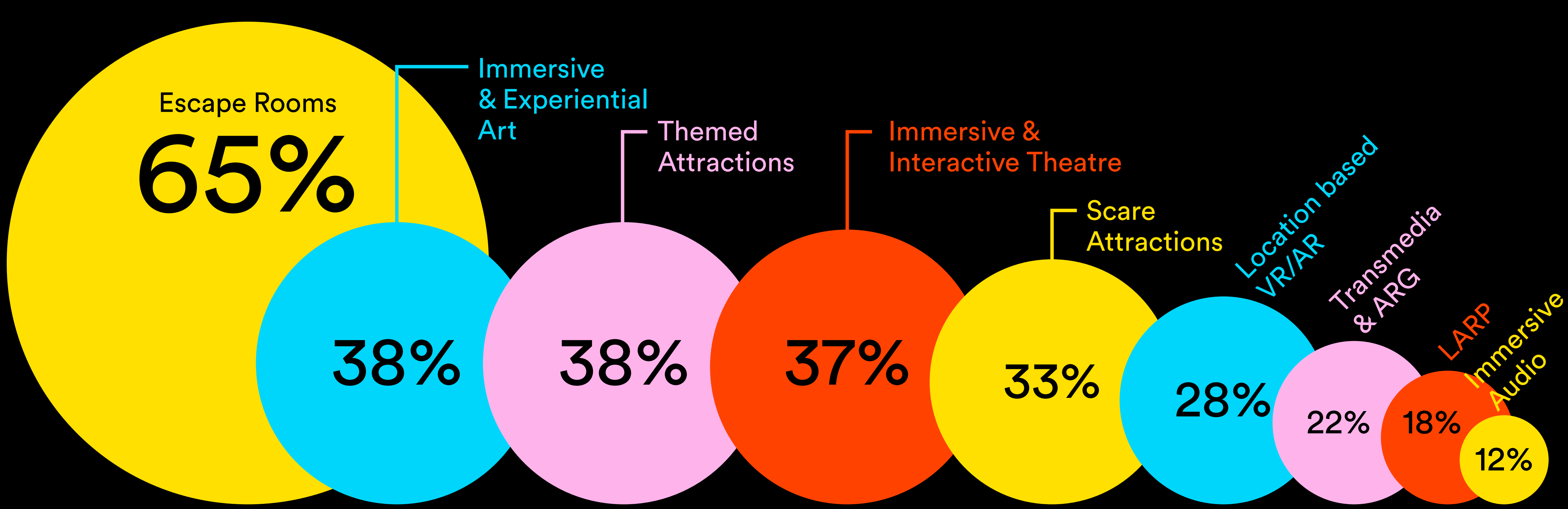
Josephine Machon has written an amazing article on our website about the question of 'What is Immersive' and tries to give some context to the term and how it evolved. Commonly understood threads that run through most immersive work are that they incorporate immersive environments, put the audience at the centre of the experience, offer an element of agency about how they engage, and involve an element of narrative storytelling.

When we founded the Immersive Experience Network in 2022 we utilised a list of sub-genres which the authors of the Immersive Design Industry Design Annual Report 2019 defined as being under the 'immersive' umbrella and we've written a deeper dive into the immersive genres on our website.

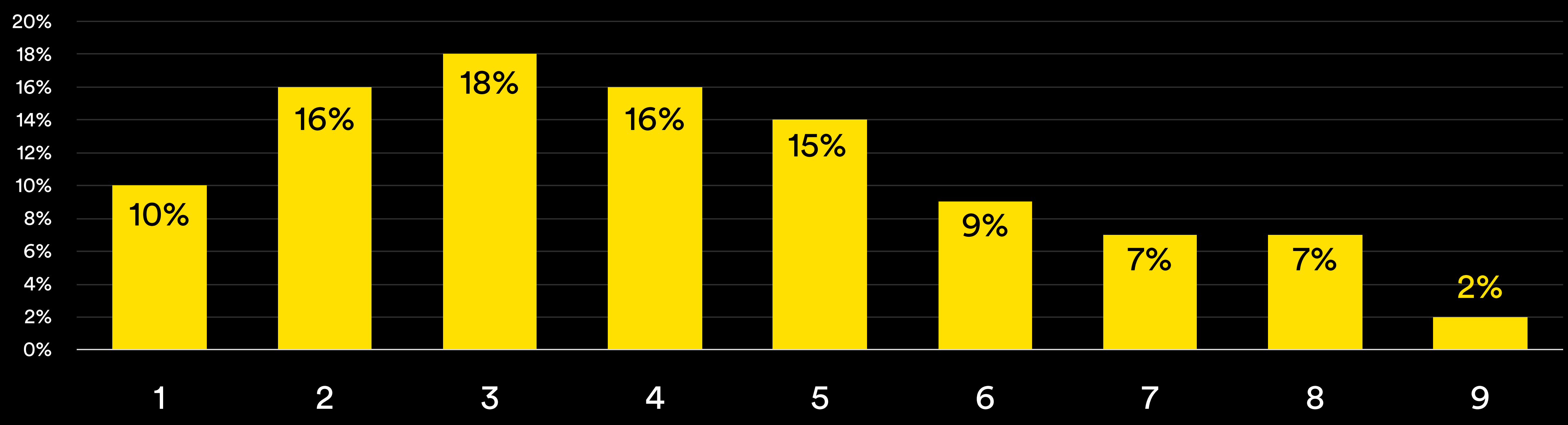
What we wanted to do with the research for this report is investigate how audiences bisect the different genres and look at what the commercial differences might be for ticketing purposes.

We briefly described each genre to our survey participants, using definitions that were created through a combination of development conversations with our community and our previous research - they are included within each genre page later in the report. We asked if they'd been to an experience like this, or if they hadn't then would they like to. We then asked them what the average ticket price they thought was fair for an experience like this, and what the maximum price they'd pay was.

Total proportion of survey participants who have participated in genre in the last 12 months



Number of genres survey particpants have engaged with over the last 12 months



The high proportion of people who have engaged with more than one immersive genre, shows that there is a rich cross pollination of audiences across the genres. The data highlights that there is an exciting opportunity for experience creators in the sector to consider more marketing partnerships between experiences in different genres in order to share & grow audiences across all genres of the live immersive community.

For respondents who had only attended one genre of immersive experience, the majority (59%) had played an escape room - this speaks to the playability and sensory immersion of the genre, and may also correlate with a higher national prevalence and lower price point, as discussed later.

Similarly, the second highest proportion (14%) was participants who had only ever attended an immersive or experiential art installation. This genre again aligns with a strong emphasis on full sensory immersion, but also highlights the close overlap between immersive & experiential art and traditional cultural experiences, especially where immersive art installations focus on a well-known artist. Both genres also offer the opportunity for a shared experience and natural (our of world) dialogue with other attendees throughout.

This is not an exact science, as we discuss in the genres article most immersive work doesn't fall purely into one genre and instead incorporates elements across the spectrum.

A typical themed attraction may include both immersive theatre performance and escape-style gameplay elements for example. As an audience member you are rarely worried about precisely how something may be categorised and are more interested simply in if it's any good or not. Audiences seem to be far more concerned with the nature and quality of the experience rather than worrying about the genre that it might fall into.

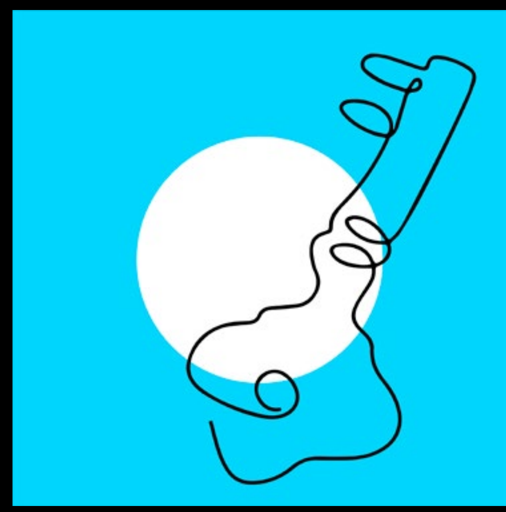
Nevertheless, we did find some interesting insights in the levels of engagement in our sample audiences, and what value they put on the different types of experience.

Potential vs Actual Audiences

For each genre, we segmented the data by people who had said they'd been to an experience in that genre before (the **Actual** audience), and people who said that they haven't been but that they'd like to (the **Potential** audience) to compare their responses about what pricing they felt was fair.

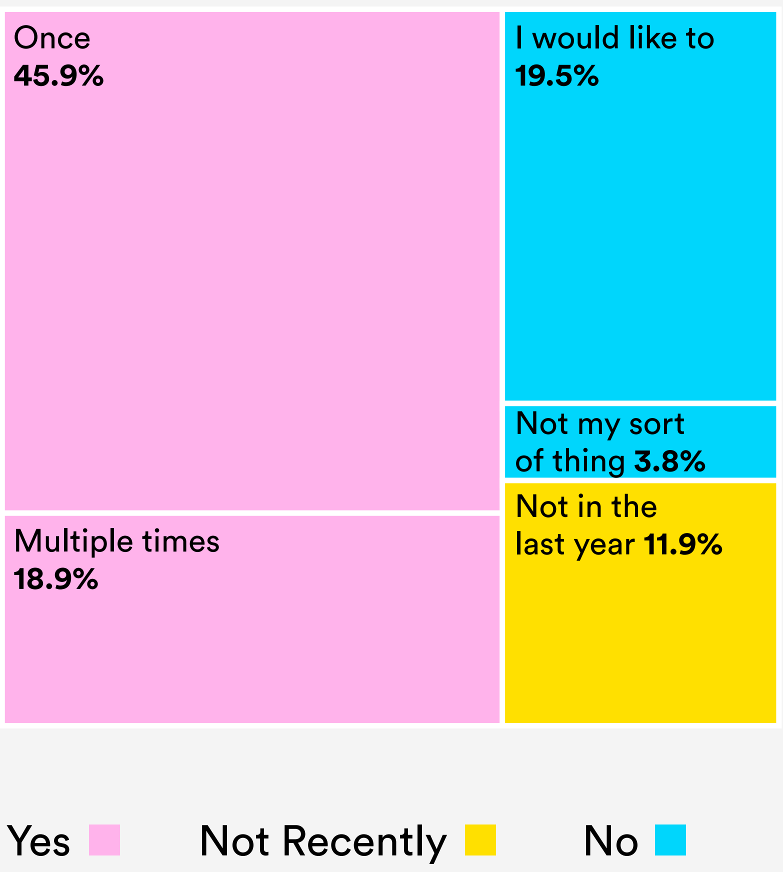
Pricing is based on what they would pay for a hypothetical experience in the future. Not what they may have paid in the past.

Escape Rooms

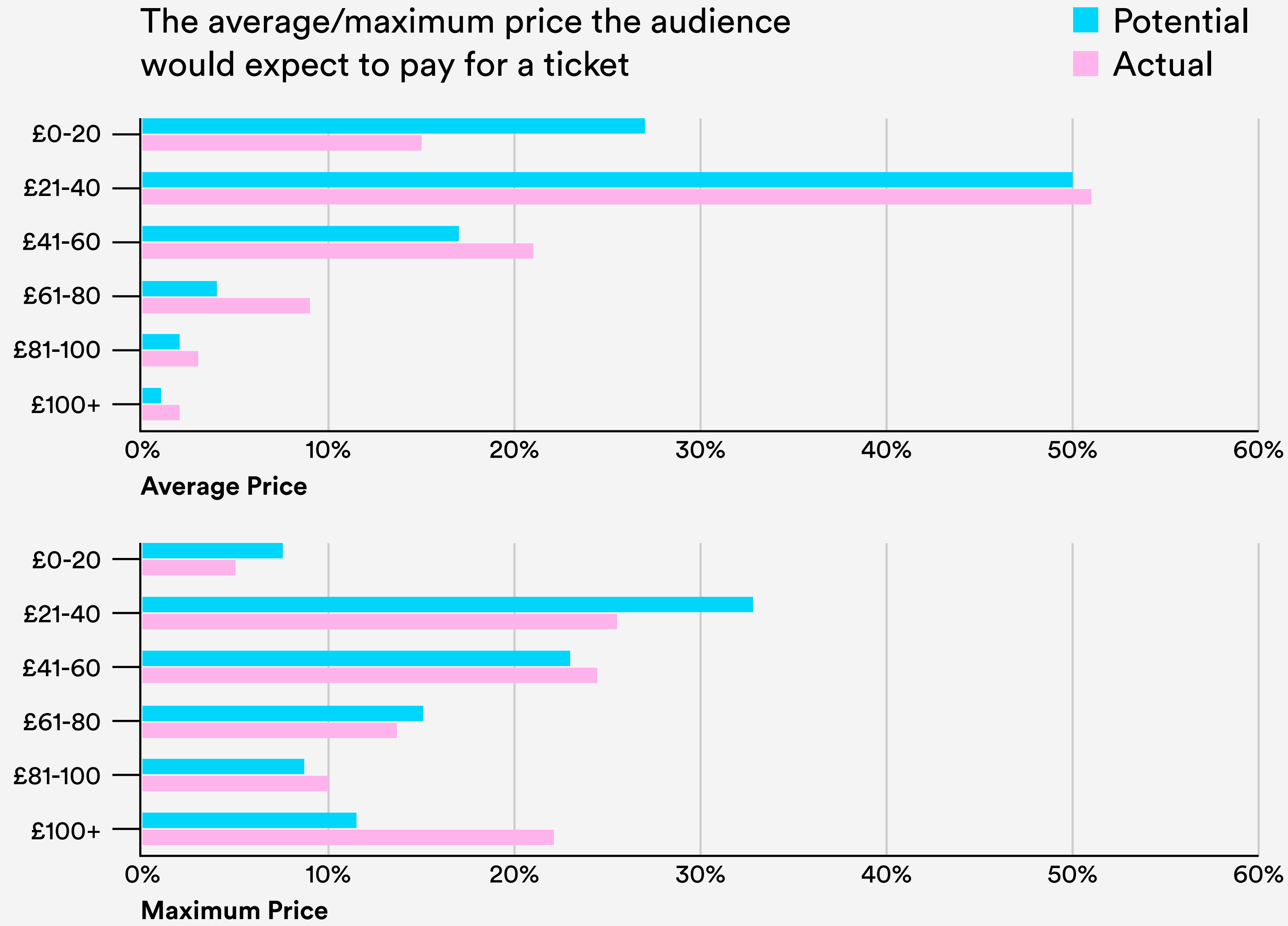


Survey Description: *A puzzle or game-based interactive experience, where participants solve a series of puzzles or complete a set of activities to be able to complete the experience, or "escape". They can involve a narrative, performers, or be fully automated, and they can take place either in a physical space or online but their defining characteristic is* ***interaction through solving games, puzzles or activities.***

Have you visited an escape room in the last year?



The average/maximum price the audience would expect to pay for a ticket

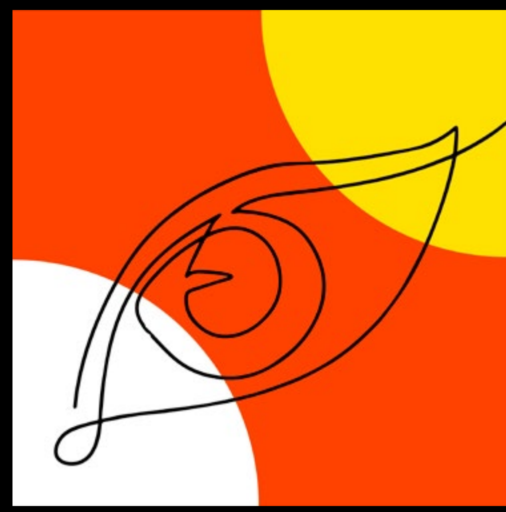


Escape rooms are by far the most popular immersive genre that our survey participants have visited, probably because of the wide availability across the UK at price points a lot lower than other immersive genres. This is reflected in the pricing our survey said they'd expect for an average ticket, and the lower maximum pricing they'd consider paying. Escape rooms inherently fulfil the key audience priorities from our survey - playability, physical immersion (by merit of being locked in the environment and deliberately separated from the real world), and communal activity.

A challenge for escape rooms is that they usually aren't replayable - both because the puzzles have been solved and because a different narrative outcome may not be available as in other immersive genres. This may be a factor in the data showing that 19% of our survey participants have been to multiple escape rooms in the last 12 months - the highest of any of the immersive genres. The need to try out other experiences rather than repeat the same one may well be a driving factor in this popularity.

The appeal of escape rooms, and their relatively inexpensive setup and operating costs has made escape rooms the fastest growing immersive genre across the UK. However with that growth there is a danger of the sector becoming commoditised and it becoming harder for quality experiences with well-designed environments and gameplay to stand out. Encouragingly, a significant proportion of our survey said they'd be willing to pay higher ticket prices if they could be convinced that the experience was going to be good value for that price.

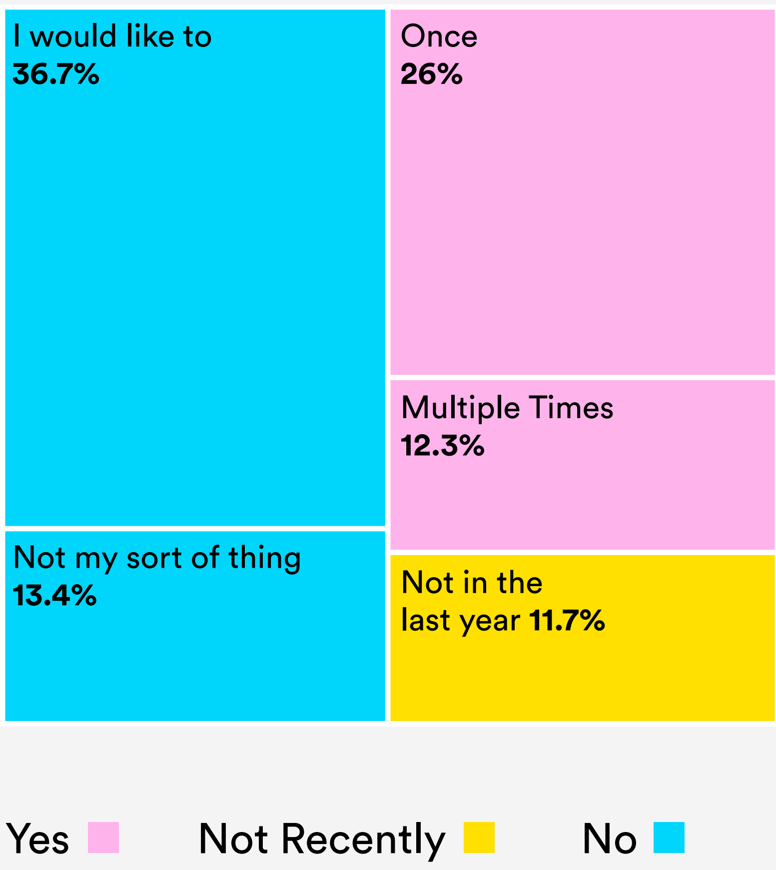
Immersive Experience Network



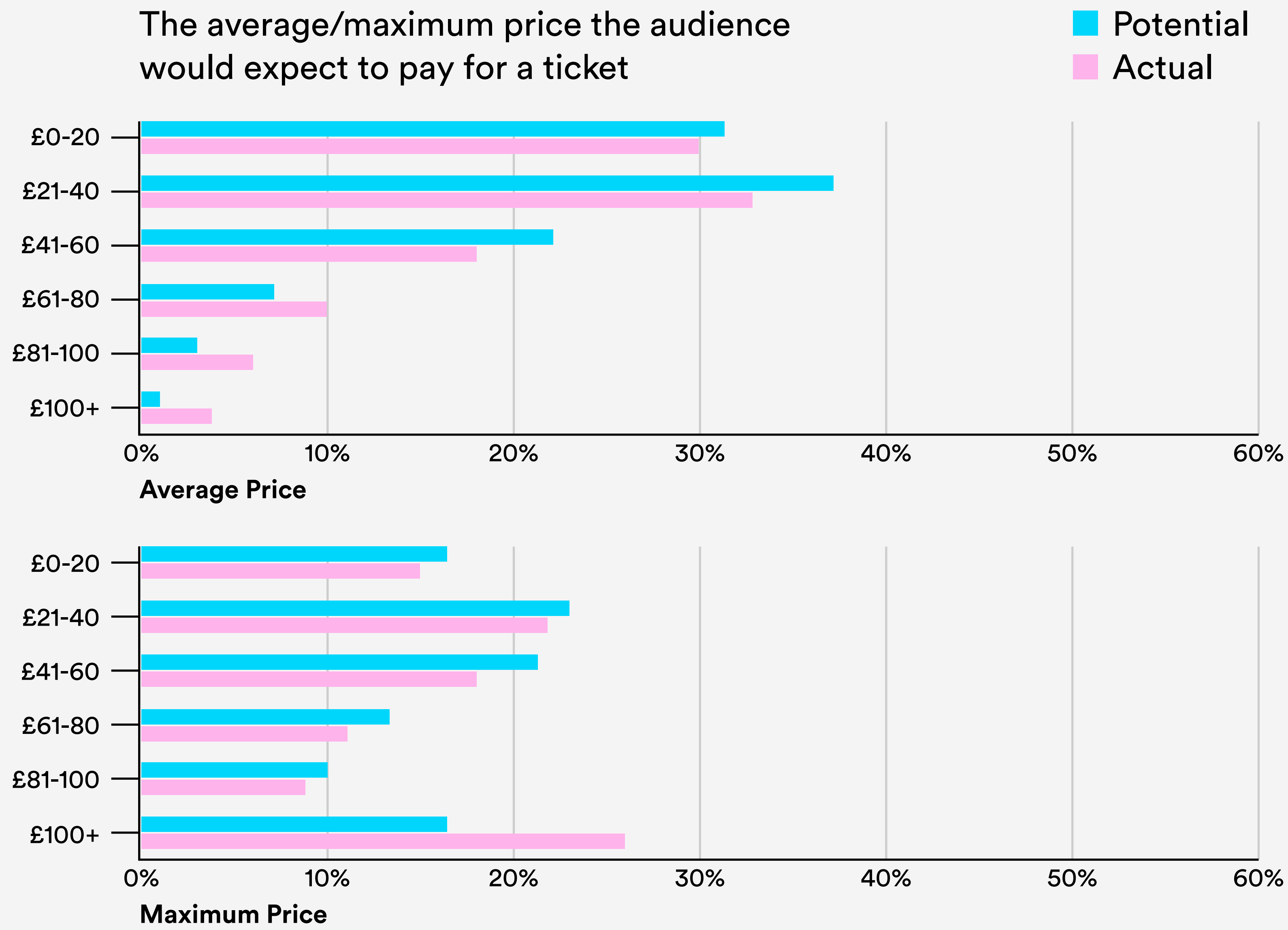
Immersive & Experiential Art

Survey Description: *A type of visual art which uses immersive or interactive elements to remove the clear boundary between a work of art and the viewer. For example, this could be art where the audience is able to interact with elements of the art either passively (touching/walking through), or actively (changing the art based on their actions or movements), or experiences which use 360 visual design to present the art.*

Have you been to an immersive or experiential art show in the last year?



The average/maximum price the audience would expect to pay for a ticket



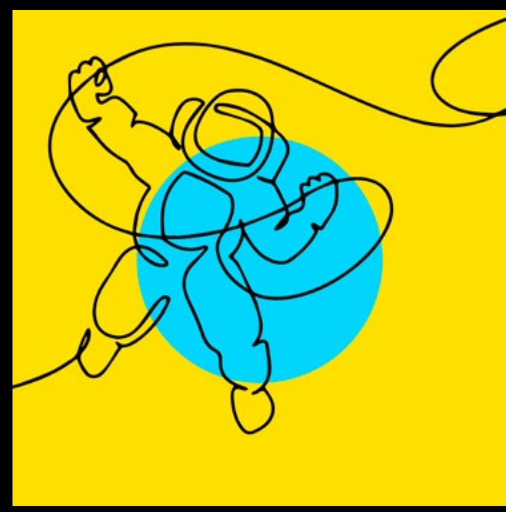
Surprisingly, bearing in mind the proliferation of projected immersive art experiences, the proportion of the audience who say they haven't been to an immersive or experiential art experience is relatively high. However, amongst those who had, for 9% of them it was the only type of immersive experience they had attended.

This genre has been a growing trend over the last few years, proving to be popular with a broad range of audiences; the pricing expectations are also broadly aligned between potential audiences and actual audiences who attend with a price point of between £21 - £40 being the level which the majority of the audience feel is appropriate.

It is also useful to note that experiential art is often located within or near to traditional gallery or museum settings, and is often part of a wider exhibition that can be accessed for free or with concessionary tickets subsidised by a variety of public funding routes. This likely impacts upon the price point that audiences will be willing to pay.

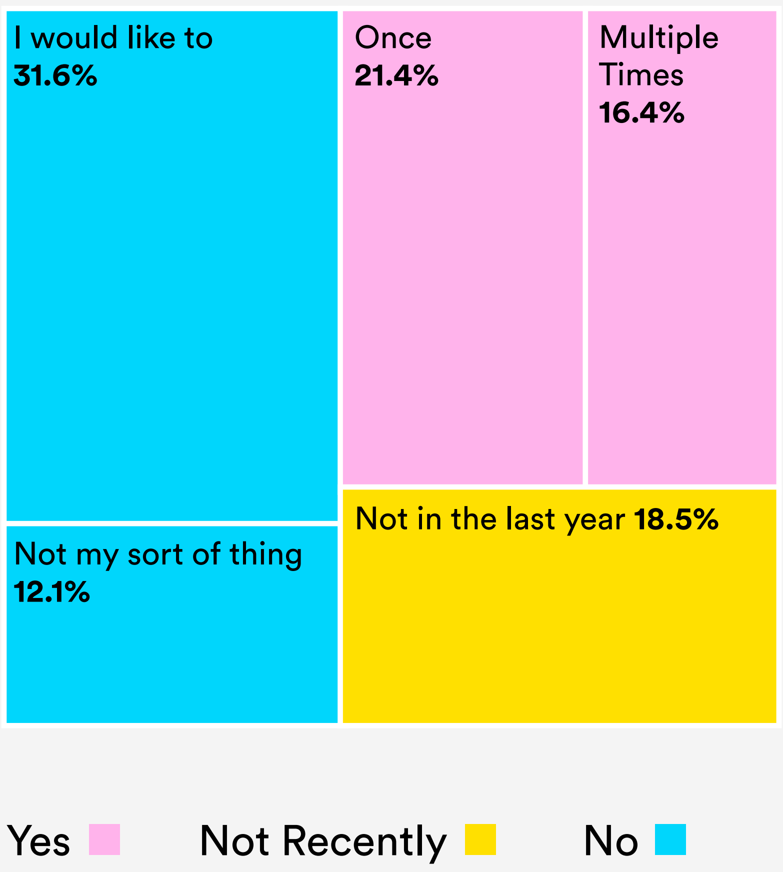
Whilst there will always be a market for family friendly and highly accessible projected art experiences, many people are now seeking higher quality original content to elevate the experience beyond just another Van Gogh clone, Lightroom in London continues to have a solid pipeline of original projected immersive art shows whilst the Wake The Tiger Amazement Park in Bristol continues to push the boundaries of experiential and immersive art with their new OUTERverse space.

Themed Attractions



Survey Description: *Themed attractions are highly designed experiences which focus on a central theme or setting (not necessarily a branded experience). They may contain elements of other immersive genres (eg. puzzles/games, live theatrical elements, technological elements) but their core premise is based around the all-encompassing theme of the setting and any characters. These experiences are usually self-paced and free-roaming, without a required narrative string.*

Have you been to a themed attraction in the last year?

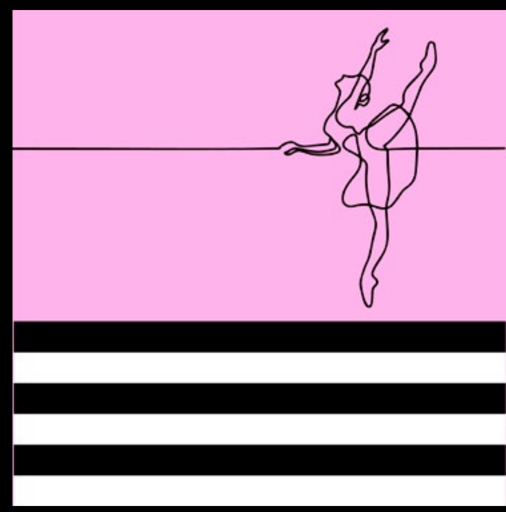


The average/maximum price the audience would expect to pay for a ticket

Arguably the broadest of our immersive genres, the term themed attraction could be used to describe many experiences which don't fit easily into another box. More often than not, themed experiences will involve elements of several different immersive genres within heavily themed environments. Emerging out of Theme Parks, themed attractions are arguably the most ubiquitous 'immersive' experiences and also the most argued about within the sector if individual examples are truly 'immersive' or not. Themed attraction often intersects with heritage, museum and tourism but could also encompass re-enactments, themed dining through to masked balls. This makes it challenging to get a sense of the nature of the genre because it contains a number of genres, styles, approaches and practices within it.

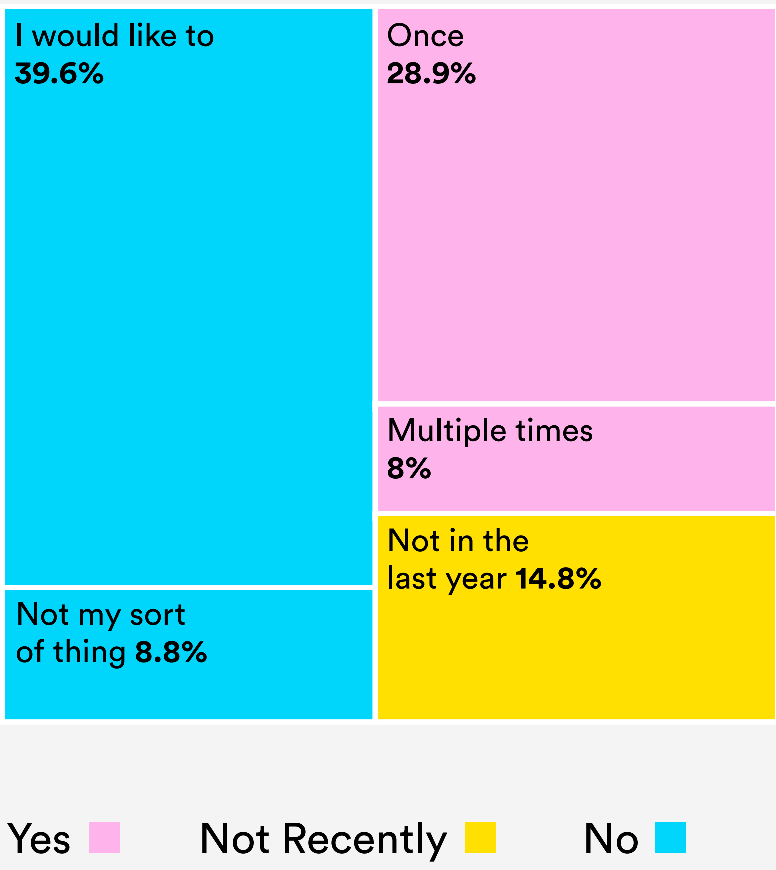
We've moved away slightly from the themed entertainment definition in the [2020 Immersive Entertainment Industry Annual Report] as we don't specifically include theme parks in this category and instead use this term to refer to stand alone experiences away from a theme park setting. This is deliberate because the world of theme park experiences is a massive subject area which is already incredibly well covered and supported by organisations like [The Themed Entertainment Association]. From an audience perspective, it's understandably amongst the most engaged with and has a very similar pricing profile to the other genres though this could be due to how they interpreted the definition and may cover experiences that as makers, we would have defined differently. Themed attractions had the second highest proportion of respondents that had attended them multiple times in a year (16%, only behind escape rooms). This may speak to the focus of themed attractions on games and playable elements to provide a narrative within the free-roaming experience, and the opportunity to experience them with different groups of friends.

Immersive & Interactive Theatre

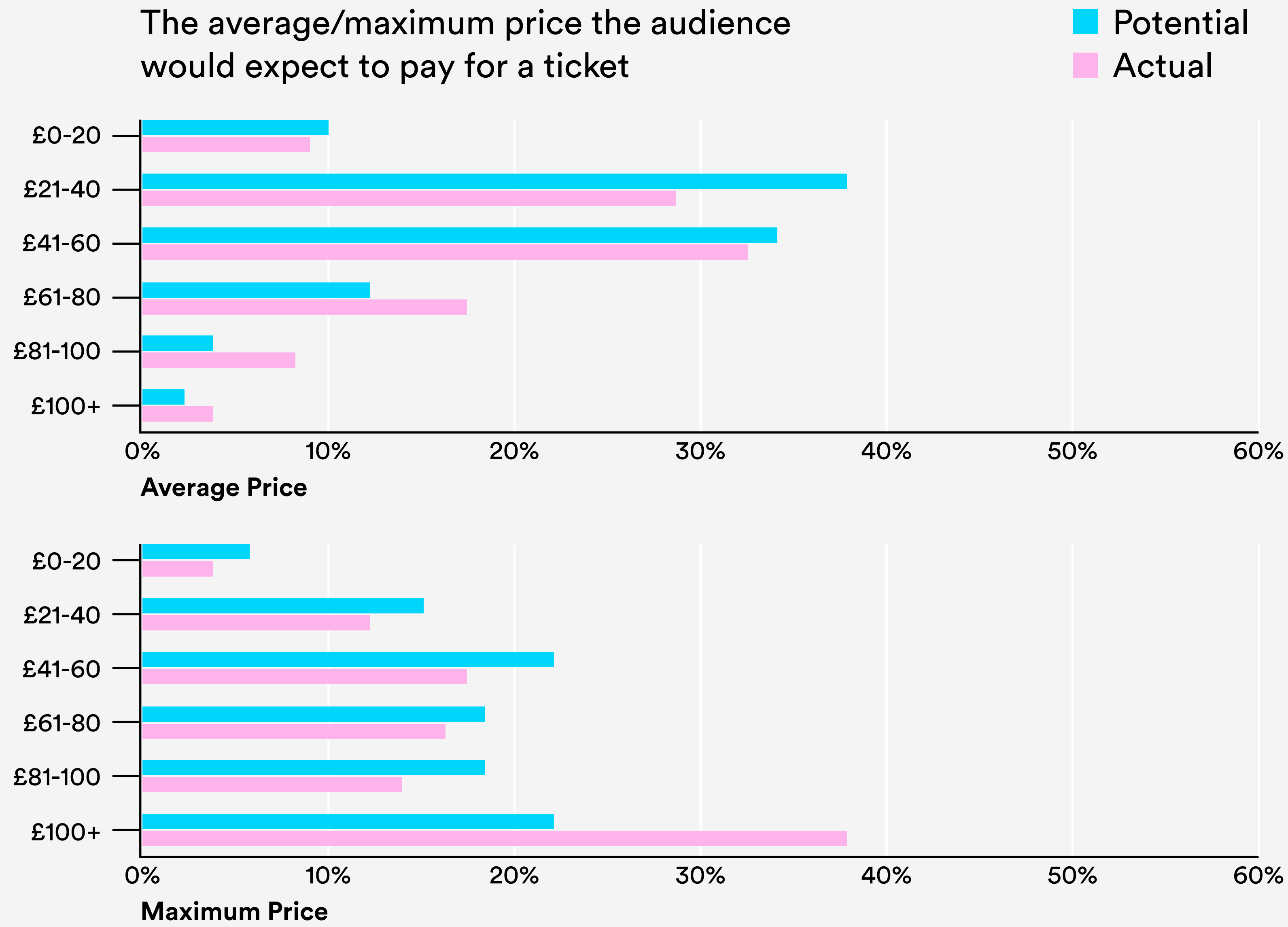


Survey Description: *Theatre performance that involves any combination of immersive or interactive elements which remove the clear boundary between a performance space and the audience space, or which make the audience either an active or passive part of the story. These may include: 360-degree or multi-sensory design, audience interaction or audience agency (e.g. performers directly interact or converse with audience members, or the audience is able to affect the narrative of the play based on their decisions or actions), "open-world" promenade (e.g. the audience can choose where to go in the environment of the play, where to watch the action from, or which scenes to see).*

Have you seen a piece of immersive or interactive theatre in the last year?

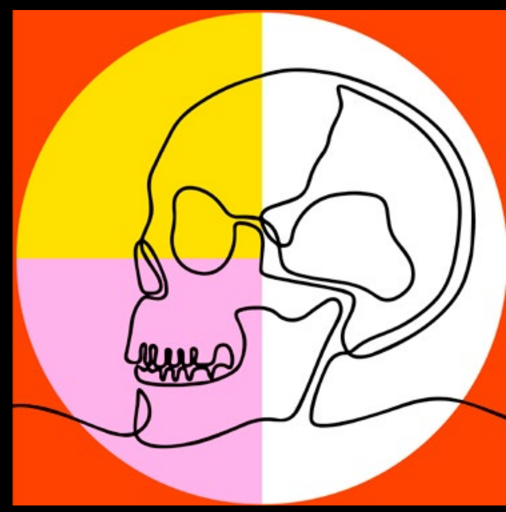


The average/maximum price the audience would expect to pay for a ticket



Immersive Theatre has one of the strongest potential audiences in our data with 4 out 5 people who haven't yet been to an immersive theatre experience saying that they'd like to access it. There is also an above average expectation of what an average ticket might cost which we feel is probably reflecting the value associated with theatre and the costs involved. This data is very encouraging and when looked at in relation to the regional lack of access perhaps serves as a call to action for makers to consider exploring the opportunities to mount work in regions outside of London.

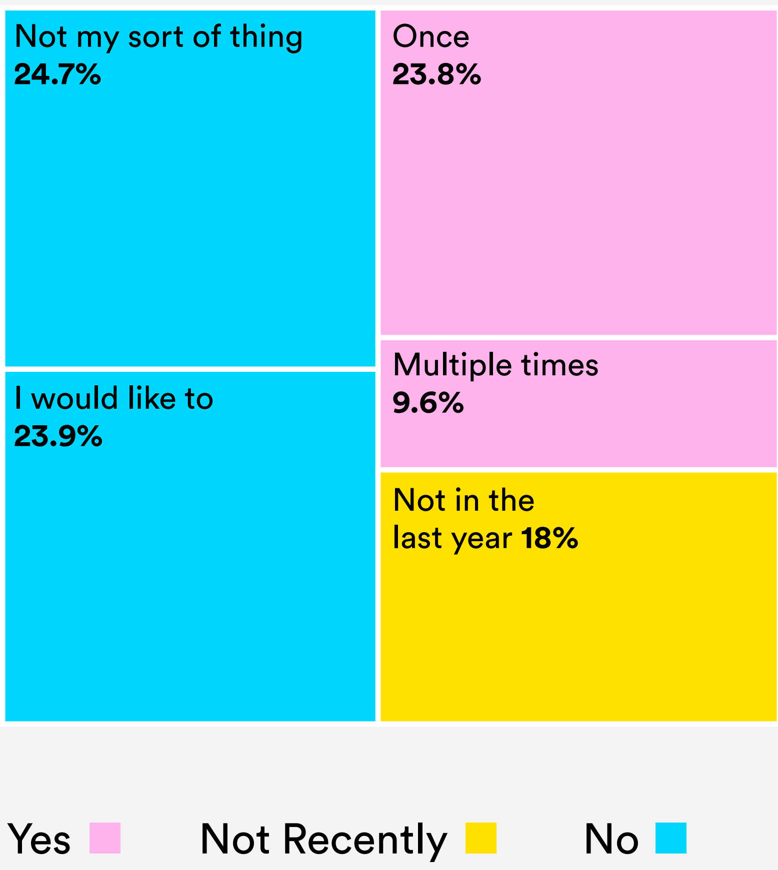
Audiences who have actually been to an immersive theatre production are amongst the most willing to pay highest maximum ticket prices reflecting the willingness to spend on a big night out. We assume potentially because of the success of large scale theatrical productions created by Secret Cinema, Immersive Everywhere, Little Lion, Punchdrunk and others which have set expectations high for production values, especially with IP led experiences. Historically, large-scale experiences pricing has been aligned with West End shows but arguably over the last few years with the financial crunch these are becoming rarer and often tend to close after short runs. The trend of new experiences being developed appears to be trying to more modest in production ambition to keep costs low and allow ticket pricing to be closer to the 'average' ticket prices audiences feel more comfortable paying. Running smaller shows for longer seems to be more achievable in the current financial climate than the high stakes gamble of putting on blockbuster productions.



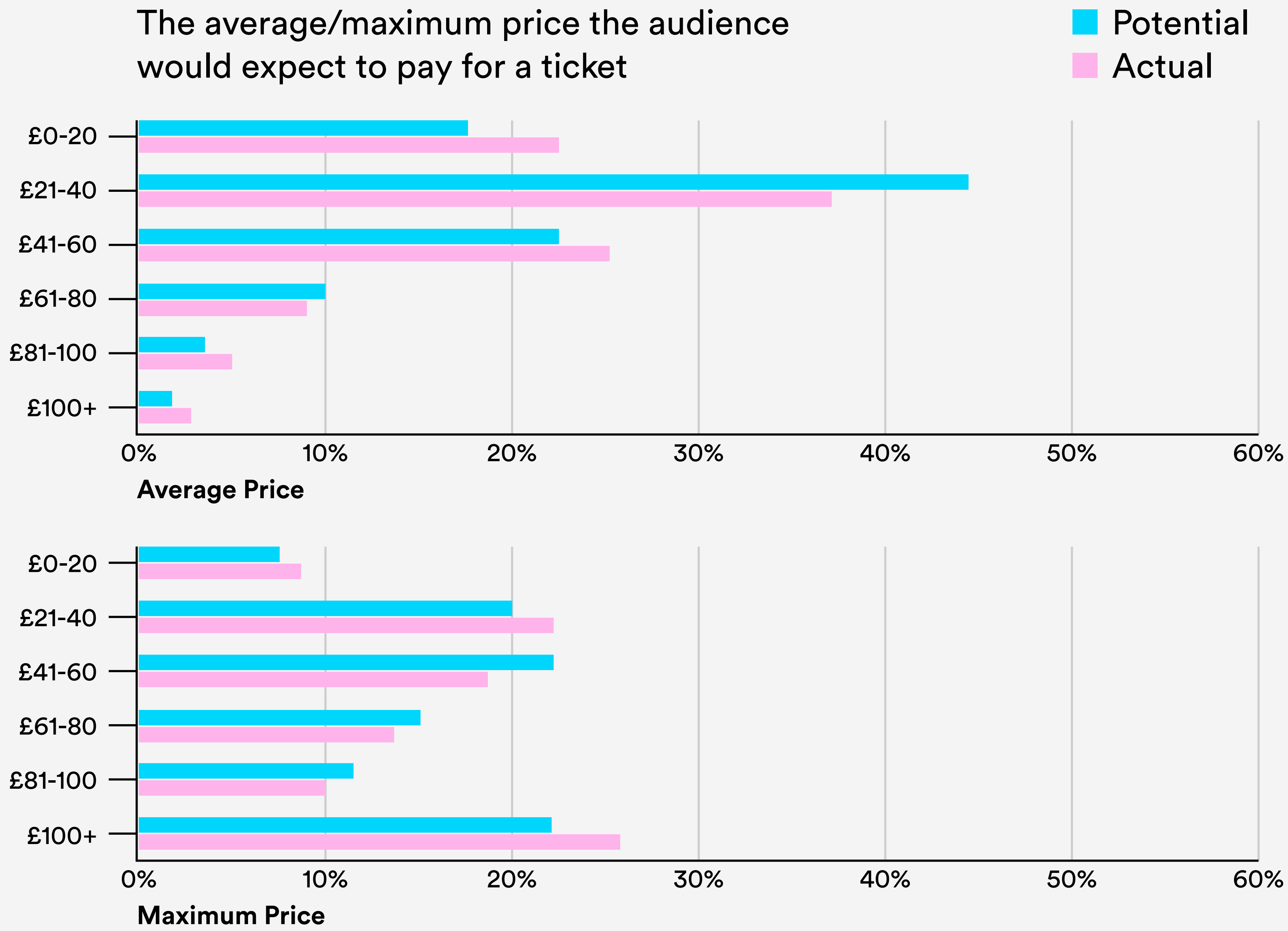
Scare Attractions

Survey Description: *A live, in-person horror experience which may use any combination of live actors, immersive design (e.g. 360 set design, light and sound effects, use of multiple rooms or spaces), animatronics or technologically-enhanced features, or audience free-roaming/self-pacing. The defining characteristic of a scare attraction is to make the audience feel scared through making them believe they are in a scary or perilous situation (as opposed to a horror film or rollercoaster).*

Have you visited a scare attraction in the last year?



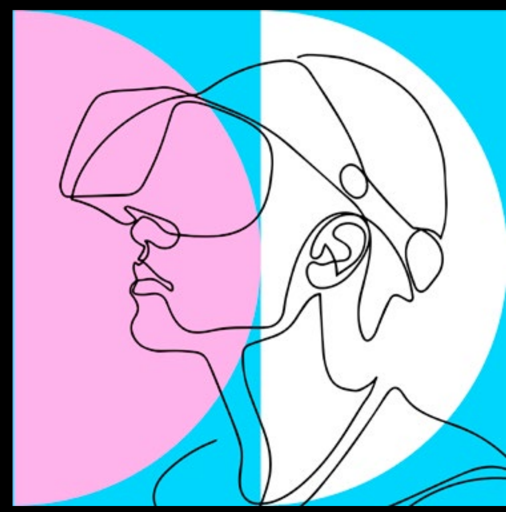
The average/maximum price the audience would expect to pay for a ticket



Scare attractions are a growing market in the UK, and in contrast to a lot of immersive work which happens in London and the other big urban centres the majority of scare attractions are being held in rural locations arond the UK. Huge scare parks like Tulley's Farm Shocktober Fest, Avon Valley FEAR Scream Park and Farmageddon, are annual occurrences around the UK along with seasonal Halloween festivals at theme parks and other attractions. Many of these offer a smorgasbord of short form experiences over a large footprint - which may explain why they are more feasible to stage outside of high rent City Centres. Institutional attractions like London Dungeon also continue to be strong year round tourist attractions.

Understandably for a portion of the audience, a scare attraction isn't appealing. However, horror films were one of the fifth most popular film genres of 2023, and with the combination of the growth of Halloween as a national festival and the popularity of theme parks where many seasonal scare attractions are located, the size of the potential audience shouldn't be underestimated. In 2023 the UK scare attraction sector claimed audiences of over 500,000 across October, with its own association, the Halloween and Scare Attractions Association (HSAA), being formed in 2022 to raise awareness, standards and safety.

Immersive Experience Network

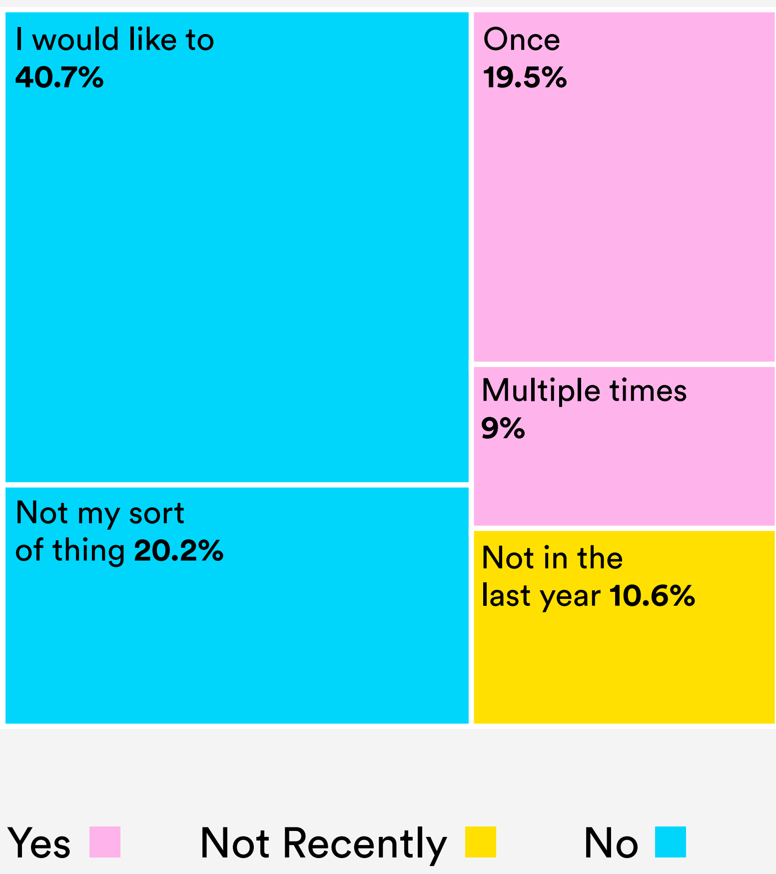


Location Based VR/AR

Survey Description: *Location based VR (virtual reality) and AR (augmented reality) are defined by requiring a specific location or environment to fully experience them (as opposed to VR games that can be played at home). VR creates a technological environment which is completely distinct from the real world and needs specific equipment including a VR headset to experience it. Location-based AR still requires a specific real-world location to engage with the experience, but uses technological elements to enhance the existing real world environment.*

Note that we are specifically talking about VR and AR Entertainment Experiences here (as opposed to AR used in commerce or productivity tools).

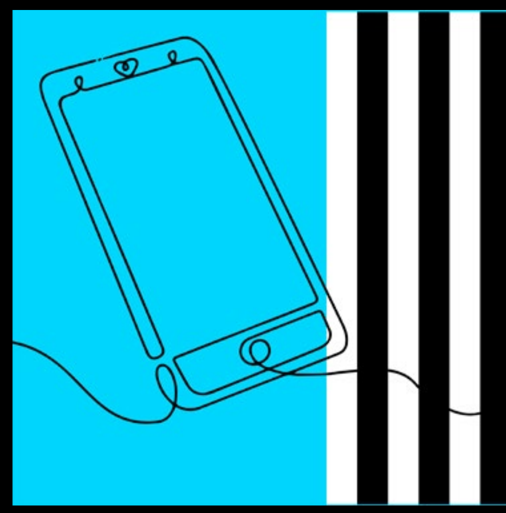
Have you been to a location based VR or AR experience in the last year?



The average/maximum price the audience would expect to pay for a ticket

Location based VR & AR e tertainment experiences have been around since the technology was first developed, and in fact it's only more recently that technology has advanced to the stage where mainstream consumers can afford to have VR & AR headsets at home, making VR arcades increasingly less commercially viable. Therefore location-based VR or AR experiences now have to offer something more than you can get at home, and this ranges between integrating VR into theatrical experiences to free roam VR spaces where you can physically walk around the VR environment, unrestricted by the space in one's own home, playing collaboratively with a team to complete missions.

It's interesting how many survey respondents who have been to a VR or AR experience would be willing to consider maximum prices over £100. This may be a subset of hardcore gamers who have an appreciation of the potential for this type of experience or it may be possible there was a misunderstanding about the question as the majority of experiences we've found are priced significantly cheaper than this.

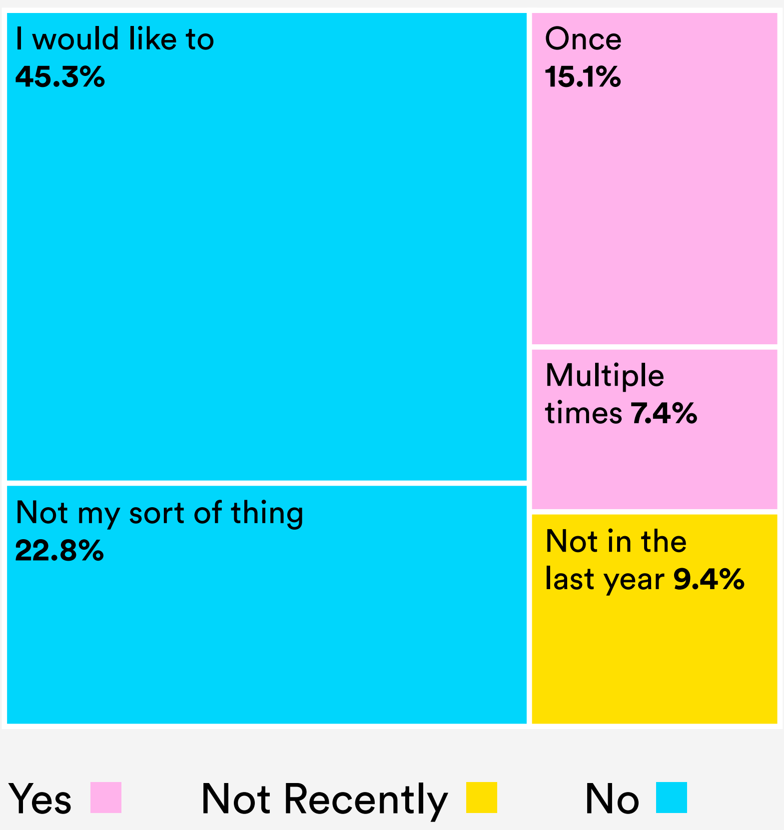


Transmedia & Alternate Reality Games

Survey Description: *Transmedia experiences use more than one storytelling platform to tell the same story (e.g. some of the narrative is told through live performance, some on a web forum, some through phone calls or text messages, and some through written media in a newspaper).*

Alternate Reality Games are a subset of Transmedia Experiences where the story uses the real world experience of the audience member as a basis, for example taking place in real-time or being triggered by interactions with real objects at real world locations.

Have you played an alternate reality game or transmedia experience in the last year?



The average/maximum price the audience would expect to pay for a ticket

Transmedia & ARG is such a broad category that it's understandably hard to explain to someone in a survey succinctly what we mean using the terms. The category is also still quite nascent so as a result, this was the type of immersive experience least engaged with by our survey respondents. Only 2% of our respondents had solely attended a transmedia/ARG experience as their only immersive experience out of all the genres.

Encouragingly there was considerable interest from audiences who haven't played one before with 45% of respondents saying they would be interested in experiencing one, the highest of any of the genres. However, this comes with an expectation that pricing is going to be low. This is reflected in the fact that many early ARGs were free to play marketing activations, and the majority of digital experiences that were created over COVID were priced much lower than a live experience would have been.

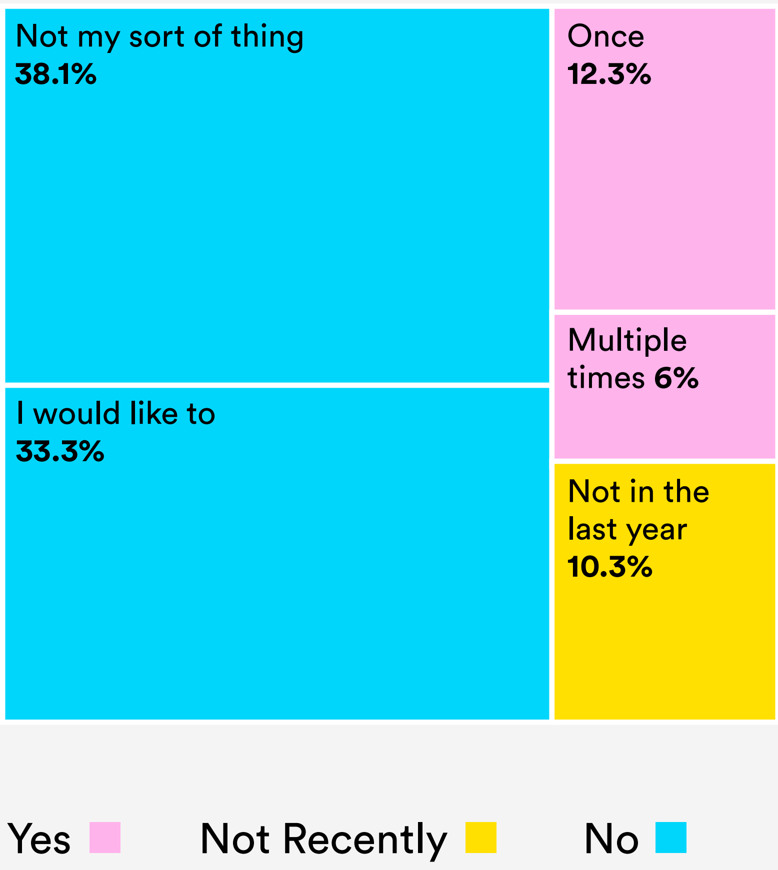
Notable recent Transmedia media experiences include Hidden City, with their James Bond based treasure hunt adventure around London, The Big Fix Up in Bristol, and The Golden Key by Coney.

Immersive Experience Network

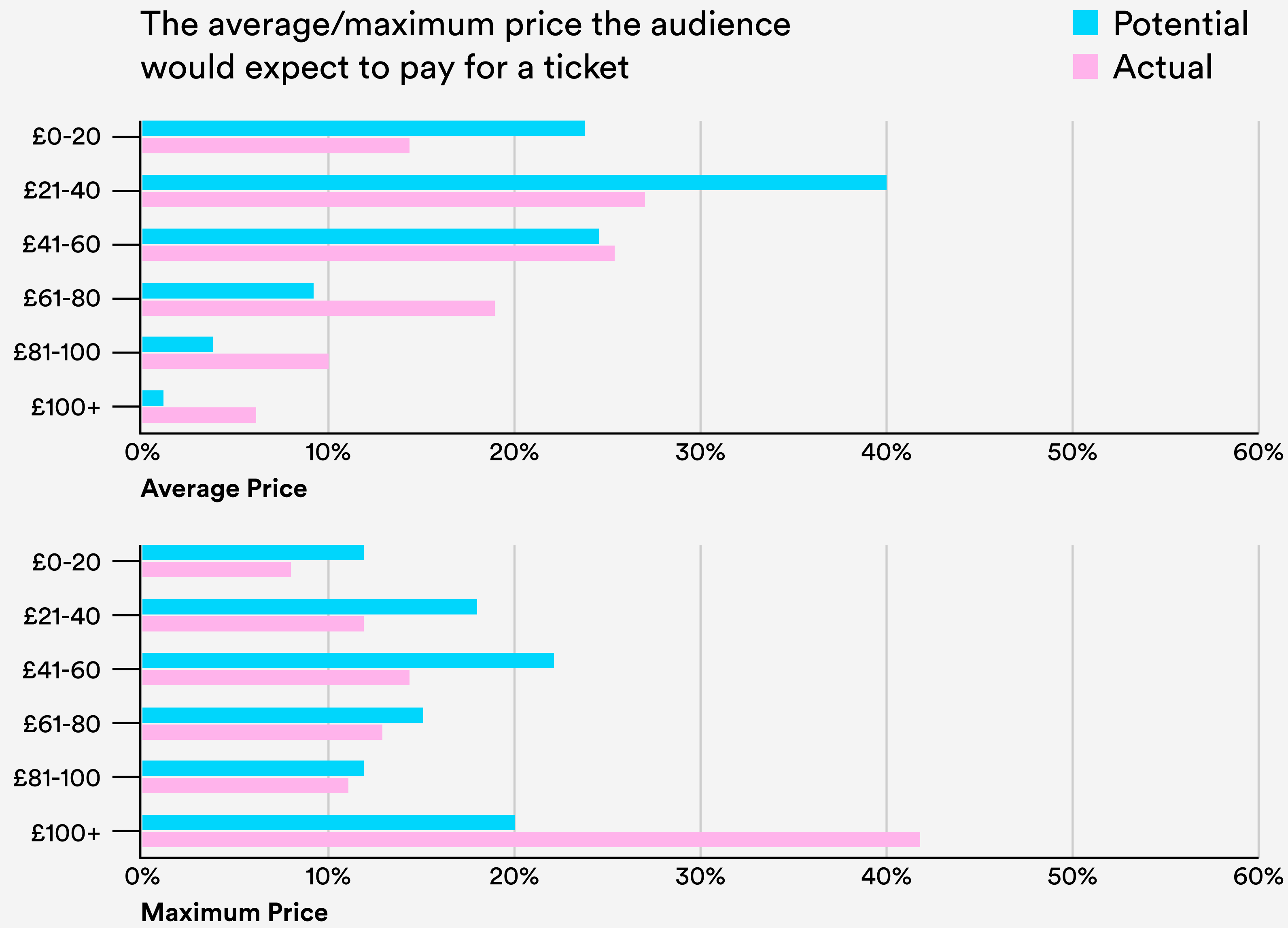
Live Action Role Play (LARP)

Survey Description: *A type of participatory storytelling experience where all or most participants actively play a role as a character in the story and therefore there are no passive audience members. While performers may be facilitators with control over specific plot points, all participants play a role in directing the course of the story. LARPs may be physically expansive or confined to a single room or area. LARPs may require a participant to remain in character from beginning to end, rather than spending any part of the experience as an observer or using "out of character" knowledge or information.*

Have you been to a LARP experience in the last year?



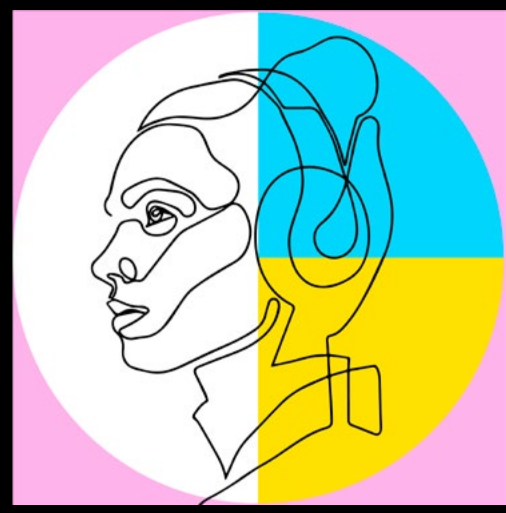
The average/maximum price the audience would expect to pay for a ticket



Live Action Role Play (LARP) has a long history stretching back to the early 80s. It's always been most embraced by a niche audience and this is reflected in our survey. Alongside scare attractions, it was one of only two genres where a larger proportion of the audience who hadn't engaged with it didn't have a desire to in the future. Understandably the idea of role playing a character, in a costume, in an experience lasting sometimes days at a time is not for everyone - and while we did not include these details in our definition provided to respondents, there may be an anecdotal understanding of LARP to involve these elements which caused bias in our respondents.

Finding places to explore LARP is also challenging as, unless you already know what you're looking for, opportunities tend to be circulated within existing LARP spaces and difficult to find elsewhere. However, the respondents desire for compelling narrative and aesthetic immersion suggests that there is indeed an opportunity for LARP to appeal to a broader audience base.

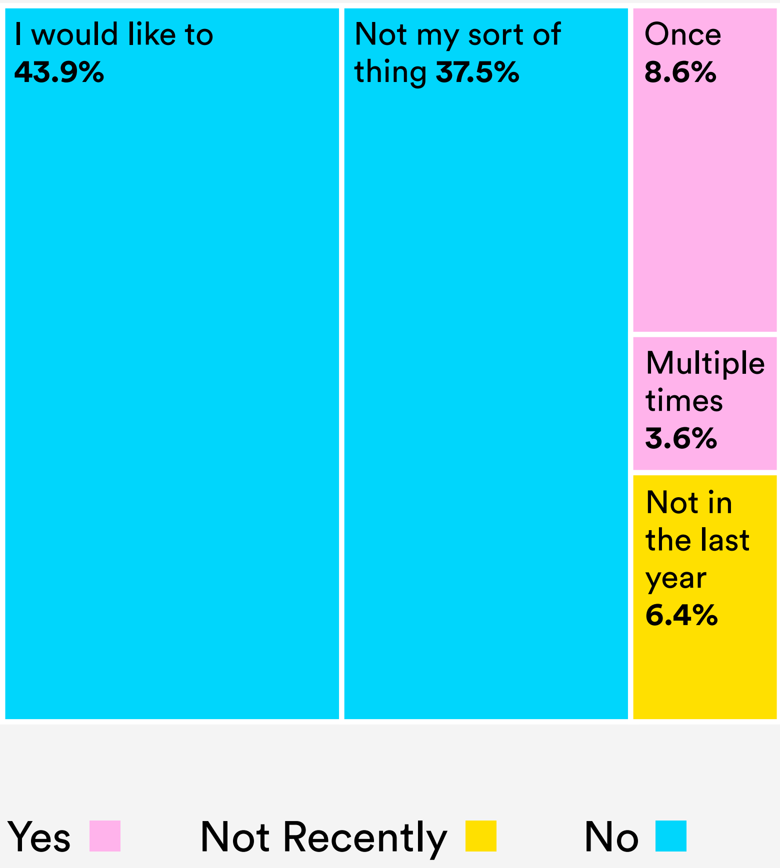
The audience's lack of experience and understanding of what a LARP event entails is potentially the main contributing factor to why the expectations about pricing vary so much between the potential audience and actual audience who have tried it. Interestingly the LARP audience who had experienced one before had the highest proportion of people willing to consider paying over £100 for an experience potentially reflecting a better understanding about the scale and length of time some events run for.



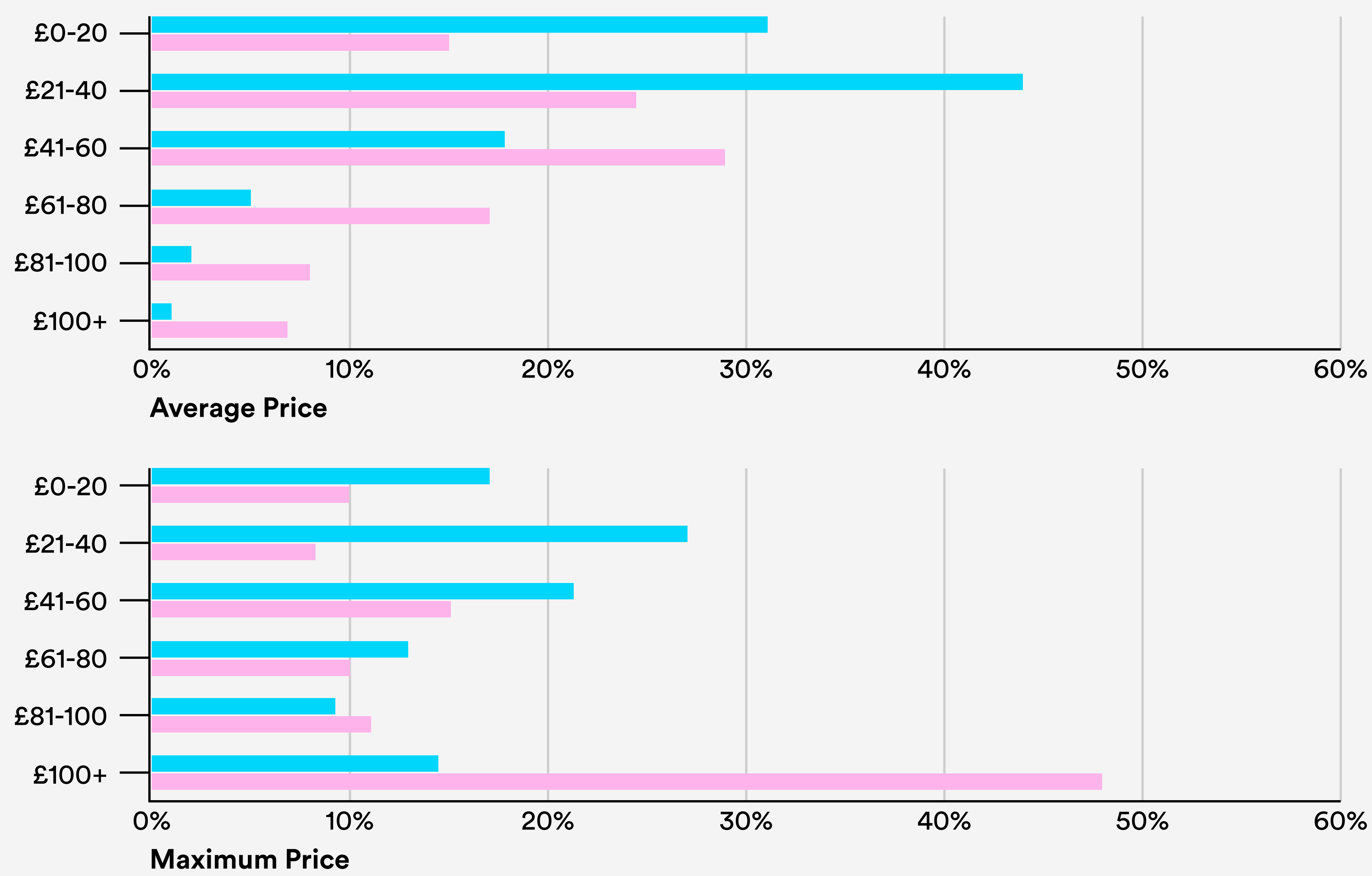
Immersive Audio

Survey Description: *Immersive Experiences which occur primarily or fully through audio without additional live performance or design elements. Immersive audio experiences primarily use binaural sound played through headphones to immerse an audience member in a narrative. They can happen in any setting. Audiences may be able to interact with the experience or the audio may be a fixed track.*

Have you been to an immersive audio experience in the last year?



The average/maximum price the audience would expect to pay for a ticket



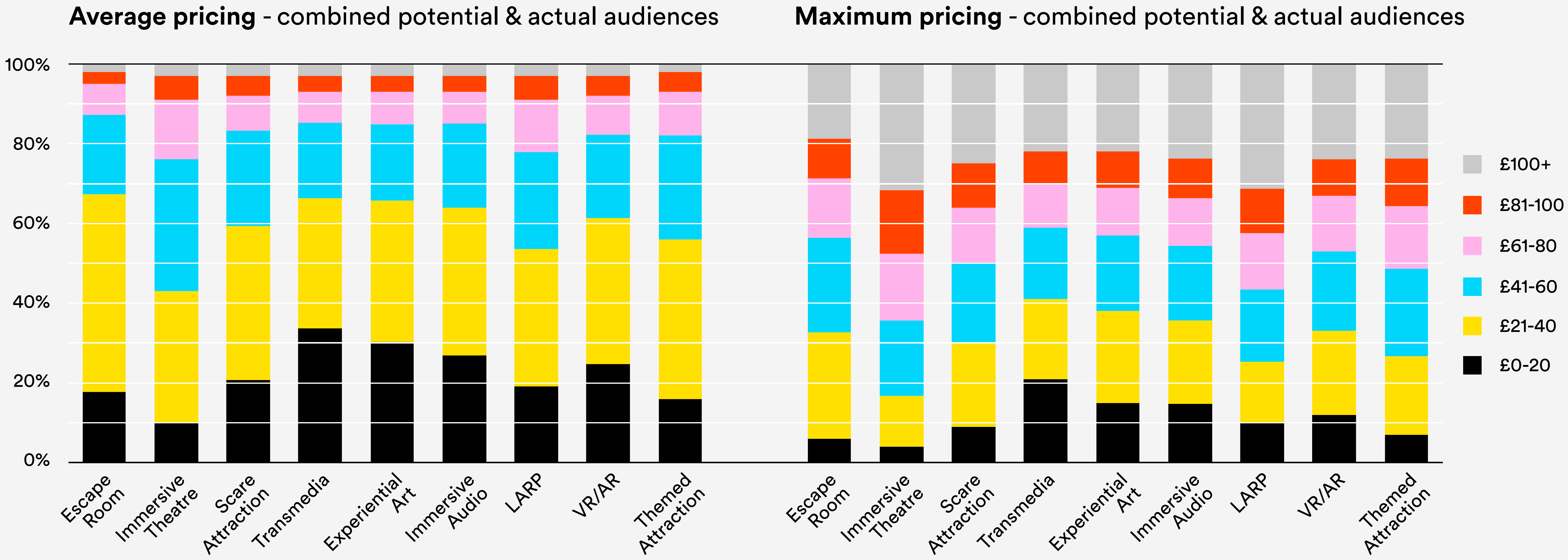
Immersive Audio is still an emerging form which has not proliferated across the UK yet in a mainstream format. Most of the work being produced are boutique experiences often part of arts or theatre festivals. Darkfield continue to be the pioneers in this field installing pop-up activations in locations around the UK and further afield and notably Punchdrunk's current show, Viola's Room, is an audio driven production. Artists like Silvia Mecuriali have also pioneered 'access from home' audio pieces such as Swimming Home.

There are significant opportunities to reach audiences in novel ways with immersive audio and it is encouraging that there is an appetite for audiences to try it. Opportunity for access is again a likely barrier to audiences having tried immersive audio, which signals that visibility is an aspect that needs some development, along with more opportunity for audiences to access this type of experience. It may also be more difficult to incorporate the audience draws of playability, high-sensory and communal experience into immersive audio, however the low requirement for audience agency in many immersive audio pieces may provide an opportunity for reaching new audiences.

Over 40% of our survey respondents who did say they hadn't been to an immersive audio experience before but would want to if they could so there is much potential for creators working with this genre. Arguably they just may need to describe it better than we did to entice people to try it. Interestingly nearly 50% of respondents who had been to an immersive audio experience before said that they'd be willing to pay a maximum price of over £100 for a ticket showing a desire for ambitious work to be enjoyed.

Immersive Experience Network

Genre Pricing Comparisons



A clear trend throughout all of the genres is that our data shows statistical evidence that potential audiences who have never visited a similar experience before will have a lower expectation for both an average ticket price, and the maximum they would consider paying compared to actual audiences who have previously tried something similar. Our hypothesis is that survey respondents who had been to these experiences should have a clearer understanding of what they involve and arguably might be willing to pay more for a quality experience.

As a result, the challenge for creators trying to attract new audiences to their work is that according to this data they may have to price their tickets lower in order to attract people who have never been to an experience like theirs before. Alternatively, they need to find a way through their marketing of explaining the value of the experience and justifying the ticket price to new audiences. In a cost of living crisis where consumers are traditionally more risk averse when choosing what to spend their money on, this is a not insignificant challenge if your ticket price is pitched high. It is perhaps useful then to consider the aspects of an experience that respondents said were important to them and find ways of articulating those elements of the experience with more clarity in the marketing campaign.

Value for money was a key factor for audience's and as we have already suggested this does not mean cheaper tickets per se but a framing of the value of the experience in its marketing materials.

By far the most popular genre engaged with was escape rooms, a testimony to the growing popularity and reach of this sector across the UK. Aligned with that popularity though is an expectation of a lower average price with 68% of our survey hoping for a price of under £40. Interestingly this didn't collate with the maximum price people would be willing to pay if they felt it'd be worth it, which had a profile much more aligned with other genres.

Audiences are willing to consider paying more for Immersive theatre and LARP experiences compared to the other immersive genres. However arguably this higher ticket price is also reflected in the high costs of creating the work and/or length of the experience. When value for money is the most important aspect audiences are currently looking for, high ticket prices will need to be reflected in the production values and quality of the experience.

Immersive Experience Network

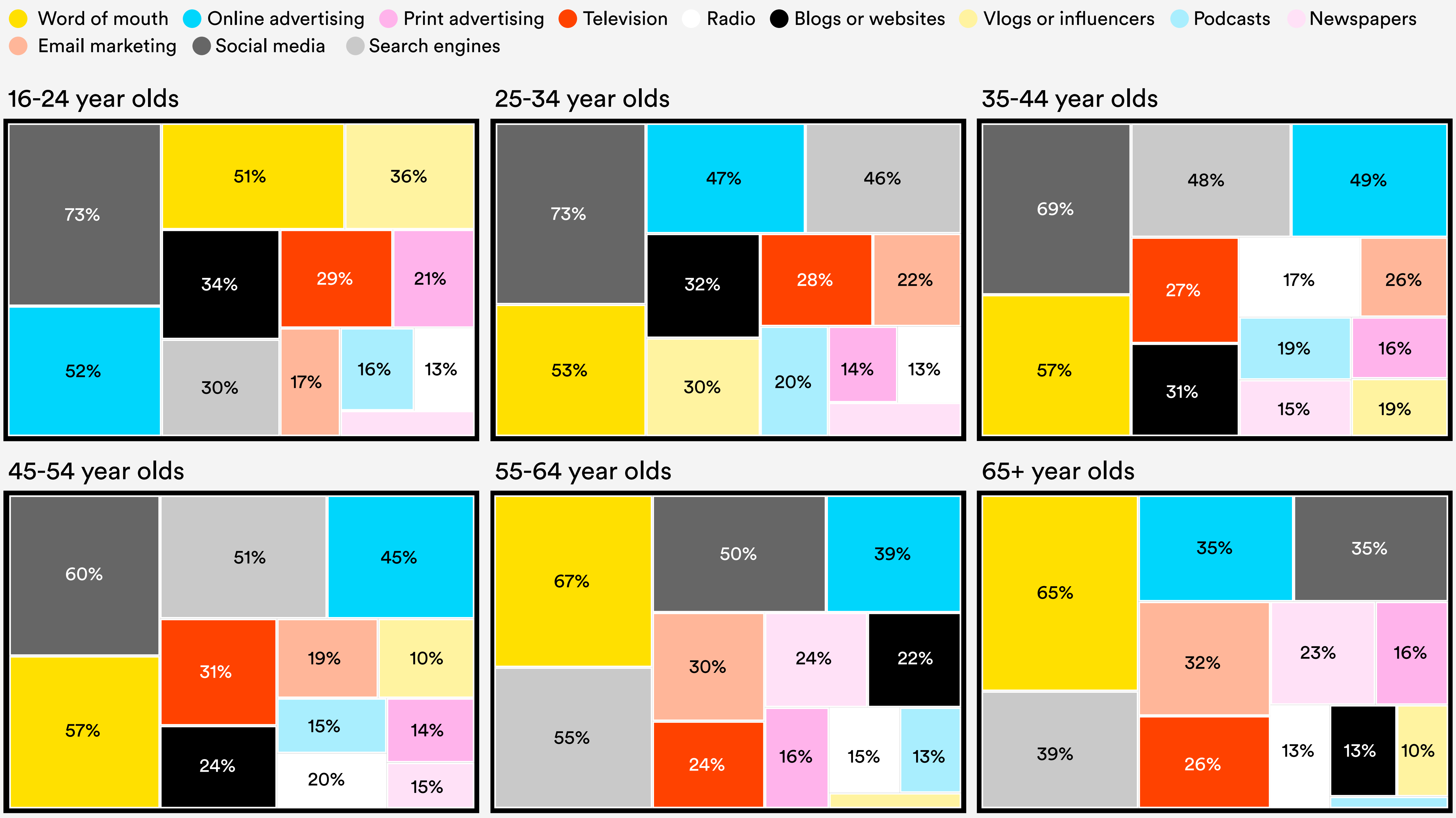
Media - Where do people find out about the experiences they go to?

By far the largest source of discovery was social media, and within that category Instagram, Facebook, Tiktok and Youtube were the most used social media platforms. Interestingly these are all primarily video-based platforms emphasising how important video content has become when marketing your experience.

At the most basic level, considering how to encourage the audience to create video content at your experience and share it with their friends and family can be a good way to build buzz about your experience. This is obviously tricky when you want people to be immersed in your experience and not on their phones, especially if you plan to bag or ban the use of phones during the experience to preserve it's secrets. When considering how to manage audience expectations and the clarity of the offering as a potential tipping point into sales - creators should consider what value keeping the experience secret still has or whether this is a hangover from the early days of marketing an emerging form of work for the early adopters.

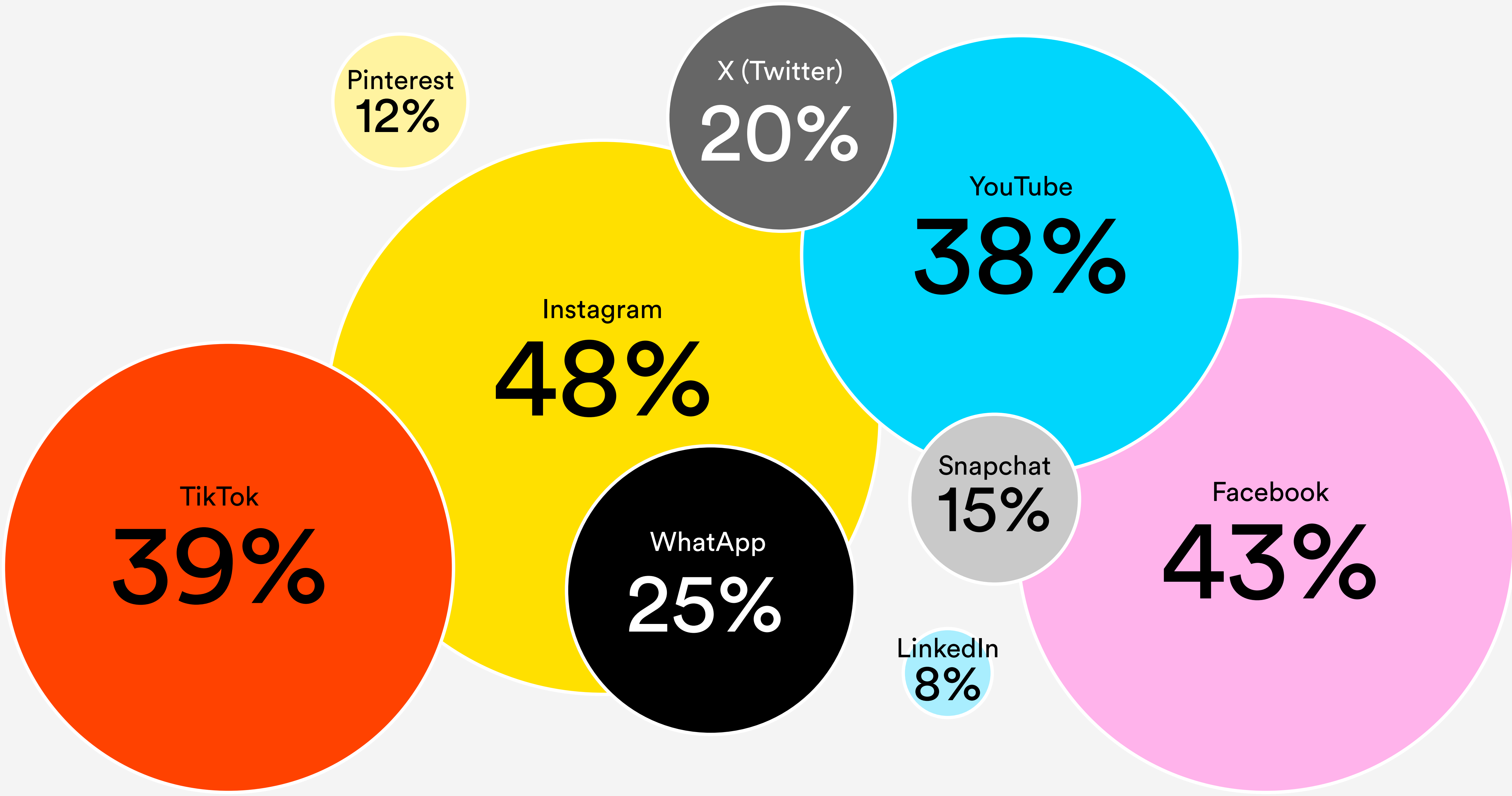
Trailer videos for mainstream commercial experiences have become an increasingly important part of marketing strategies for large scale events so we'd recommend going to look at as many examples you can find to pick up tips on how people are using them. Again, it is useful to consider the aspects that audiences feel are important in an experience such as narrative, fun and quality. If you are worried about concealing aspects of the experience to protect surprises then focussing upon the feel, narrative and aesthetic style might be good starting places for video and other marketing content.

Where do people find out about the experiences they go to? (by age group)



Immersive Experience Network

Which social media platforms do they use to find out about the experiences they go to?



With the growth of video platforms like Youtube, Instagram and Tiktok, the influencer market is growing in importance. In future research, we want to dig a bit deeper into this area to find out who is making the videos that people are discovering immersive experiences through. Most large scale immersive shows will now invite and/or pay for a range of influencers to the press night shows along with the usual media outlets, though anecdotal feedback is that results have been mixed or at least hard to measure.

We'd like to collate some case studies of people's experiences and see if there are any guidelines or best practices the community can share with one another to maximise the effectiveness of these channels.

This potentially needs some more research and we'll be reaching out to digital marketing and influencer marketing agencies for their insights for future reports.

Immersive Experience Network

The Mainstream Media

Only a minority of people said they find out about immersive experiences through traditional mainstream media like television, radio and newspapers.
This is a nuanced response though as the definition of 'mainstream media' gets increasingly blurry as outlets publish content across a variety of online and social platforms alongside their traditional channels. How many of the respondents who said they found out about experiences via websites and socials feeds for example actually meant they were avid consumers of Time Out, The Guardian and other newspapers online content?

What is clear though is that many immersive experience creators have struggled to get good critical coverage through mainstream media channels. We believe this is primarily due to the emerging nature of the immersive genre and the fact that most immersive experiences don't fit easily into a traditional culture category which the mainstream media are used to reviewing.

"The role of a film critic is to have seen a lot of films, and to be able to put that film in context with other films, "this alludes to that," "if you like this, you might want to look at that," or "that film that was made before the birth of sound", or "that film you won't have seen because it was only released in Iran." To contextualise it, then to be able to say accurately "what is it?", then say whether it works on its own terms, then give your opinion about it; and your opinion is only ever your opinion."

Mark Kermode

Very few outlets in the mainstream media employ immersive specialists to review immersive work, instead they'll send out their theatre or arts critic to review an experience which is arguably a completely different piece of culture to what they are used to reviewing.

It's arguably like when the Olympics happens and the BBC temporarily needs to provide extended coverage for over 32 sports, many of which the in-house staff have absolutely no experience of. Suddenly, cricket commentators are commentating on curling, the rugby correspondent is sent to the gymnastics, and the darts commentator is sent to the archery because "it's kind of similar isn't it"?

Whilst these are top professional broadcasters (clutching a stack of background-reading notes about what the rules are), who are able to do an admirable job of providing a general overview of what they see in front of them, they are commentating as enthusiastic sports fans rather than subject matter experts.

In a similar fashion, a theatre critic who comes to review an immersive experience - unless they are an immersive fan - won't necessarily be able to put into context what the show is creatively trying to achieve. They won't recognise the lineage of some of the creative devices or interactive mechanics being explored or necessarily understand the nuances between scripted performance and performer improvisation in the same way that they would be able to about a piece of traditional theatre.

They will of course be able to give a general critique of if they have personally enjoyed the experience or not but all too often they can miss the nuance of the work which is disappointing, and in some cases their traditional review style can also miss the key elements of the experience which could be the hooks for new audience.

This isn't a criticism of the critics who do amazing work with the resources they're given, instead this is a call to action for the media to take notice of this emerging creative sector and employ critics and reviewers who are the immersive audience and steeped in the genre to provide better coverage of immersive work.

Indeed there are aspects of immersive that have no mechanisms for review outside of the niche sector, which is perhaps a call for creators to think about ways in which they might leverage vloggers and influencers but also to explore ways of building relationships with more traditional media outlets too.

The immersive experience & interactive entertainment sectors are rapidly growing and there is increasing interest from the public who want to understand more about the experiences being offered. Our research denotes that audiences are accessing other more traditional forms of arts, culture and entertainment, so there is work to do in developing ways to raise visibility for immersive work in the spaces where other interests are being promoted or listed.

Whilst online publications like No Proscenium continue to provide specialist coverage to immersive fans, there is opportunity for the mainstream media in the UK to start running dedicated listings and providing quality independent reviews sections for immersive work.

"The art of criticism is incredibly valuable to any immersive production, because it speaks to a wider audience than just the genre's core audience. But finding an outlet for that wisdom and insight needs to be based on savvy business principles - after all, a publication needs to support the position, expenses and wages of a dedicated editorial desk.

To that end it seems sensible for the industry to look to itself to proactively build this into a viable readership, rather than expecting a media outlet to review at random. Restaurant and theatre reviews rack up significant clicks and views for an online publication and these pages in turn generate advertising revenue that make up the title's commercial business.

If we look at this as a symbiotic economic relationship then perhaps, we will find that the industry is thus seen as a viable economic prospect very much worth investing in, especially with the growth of the Experience Economy. To that end, producers should look to their budgets for strong PR campaigns, post boosting, promotion of editorial quotes and other forward-looking practices that speak not only to their core audience but to the rest of the ticket buying public."

Mance Communications

The Cultural Question

A big challenge for immersive creators has always been accessing cultural funding because inevitably a lot of work doesn't fall into a traditional cultural category (eg. theatre or dance) and therefore is ruled ineligible. This was acutely felt during COVID where creative organisations were trying to access the Cultural Recovery Fund and had to prove they were 'culturally significant' to qualify for vital funding.

The challenge was that whilst not explicitly stated, being 'immersive' or incorporating interactivity into your creative work wasn't necessarily perceived as 'cultural', and so people had to lean into the more traditional theatrical elements of their work to qualify. The resulting funding awards across the sector felt inconsistent, with some organisations qualifying for support whilst others doing almost identical work did not.

COVID and the Cultural Recovery Fund are now behind us, but it feels like the misunderstanding and percieved disregard towards the sector, which is growing and providing significant employment to creative practitioners as well as helping fuel the UK's creative eco system, continues. We should continue to challenge the creative cultural industries to consider more flexibility and elasticity for the traditional disciplinary silos in order to respond to the rapidly developing live/location-based immersive sector.

Theatre Tax Relief

Many immersive productions rely on Theatre Tax Relief (TTR) in order to be viable. This is a tax relief which offers 40% tax relief for non touring productions on qualifying production costs and it's often the difference between a project being financially viable or not. Amongst the qualifying criteria are that the production must be a play, opera, musical or dramatic piece where the performers are live and play roles. The majority of tickets also need to be available for paying public or educational purposes. Many immersive productions qualify due to the fact that they involve dramatic performances by live performers, and TTR is arguably one of the main reasons why the UK is a world leader and pioneer of creating immersive work at scale.

In September 2023 the **Treasury opened consultation** on 3 new clauses to the Theatre Tax Relief scheme, one of which included excluding production from TTR where "the main focus is not observing the performance".

"They [SOLT & UK Theatre] have said that leading producers of immersive and experiential work have "ceased development of new productions" until the proposed changes to the clause relating to audience participation have either been clarified or withdrawn.

"Within this stated policy purpose, it could be argued that pantomime should be excluded as audiences are often invited to participate, either through call-or-response interaction with performers or individual audience members invited onto stage to participate in a scene.""

Neil Puffett - **Arts Professional**

Thankfully, potentially down to lobbying by some major immersive producers and the wider theatre sector, the proposed clauses were amended in November and a revised version was published whilst further consultation on potential changes is carried out.

Heading this charge has been Tom Lionetti-Maguire, along with his team from Little Lion Entertainment who have been meeting with MPs on both sides of the Commons, Lords, DCMS, CMS, HMRC & HM Treasury to make the case for immersive. Nickie Aiken, MP for Cities of Westminster and the Crystal Maze site even spoke in the parliamentary debate on the finance bill to raise her concerns about the effect the proposed changes could have on the immersive sector.

In response to Ms Aiken, the responsible Minister, Gareth Davies, the Exchequer Secretary to the Treasury, welcomed Ms Aiken's thoughts and provided a clarification on TTR:

"She raised points about specific challenges, particularly on immersive audiences. Production will qualify for theatre tax relief if the main purpose of the audience is to observe. Some level of audience participation will not necessarily disqualify a production, but it cannot be the main purpose. Further guidance will be issued by the Treasury, and I know that my hon. Friend the Financial Secretary to the Treasury would be happy to meet her to discuss the specific issues her constituents are facing."

Hansard Record & **Video at 17:49**

We don't know what the treasury's motivation behind the proposed changes were, and to be honest if the proposed wording didn't potentially exclude pantomime then we wonder if the wider UK theatre sector would have been quite so strident in their response. What's clear is that the uncertainty has caused many immersive companies to make contingency plans for what happens if they are no longer eligible, which is a further financial pressure in an already tough economic environment.

"We wholly support all the fantastic work being done by IEN. As one of the oldest producers of immersive work in the UK, Little Lion understands the significance of this industry and has seen how it has grown from start-up-esque roots to a fully-fledged and hugely important industry of its own.

Unfortunately, and despite having had tens of millions of audience members through the doors of various immersive experiences in the last decade, the industry is still not properly recognised by the Government or any of the recognised Arts bodies.

This is not the failing of the industry practitioners, who's aims should continue to be to make imaginative work and being entrepreneurial, but the failing of the structures that surround it.

Working with both sides of the Commons, various councils at DCMS, and with IEN, we hope to rectify this; by bringing the industry closer together, getting proper acknowledgement and eventually enacting support mechanisms via new systems of grants and tax reliefs."

Tom Lionetti-Maguire

“We believe that creativity and culture are deeply connected, but different. Creativity is the process by which, either individually or with others, we make something new: a work of art, or a reimagining of an existing work.

Culture is the result of that creative process: we encounter it in the world, in museums and libraries, theatres and galleries, carnivals and concert halls, festivals and digital spaces.”

Arts Council England - Let’s Create Strategy

We hope that the proposed new clauses were just down to a Treasury bureaucrat attempting to shave a few percent off a tax relief scheme by redefining some terminology without understanding the breath of cultural organisations who utilise the scheme, rather than the alternative where the government wants to start putting up barriers for support to organisations not making ‘traditional’ work.

What is clear is that the sector needs to continue to loudly advocate for its relevance and importance to the UK arts sector, and start to gather more robust data to support its case. Continued data-collection, evidence gathering and the development of case studies will be crucial in building a body of evidence that the immersive sector can employ as a tool to raise visibility and credibility within the broader CCI landscape. It will also be a vital tool in the endeavour of lobbying and advocating for more robust infrastructure, support and policy for the sector. It is a call to action for unity and community, something that IEN hopes to continue to be a catalyst for.

The case for culture

Is immersive work culturally significant? If we take a lead from the Arts Council England Strategy then let’s start with who is making the work. Our ESRC funded research In Your Own Words spoke to people creating immersive work across the genres, and explored how they came into the sector and what other work they were involved in. As a new and emerging sector, there aren’t yet enough established routes yet through arts training, academia or apprenticeships for people to come through, and a significant proportion of our focus group members had got involved by moving sideways from other creative sectors, including theatre, film, game design, software development and music.

These are extremely talented creative professionals, often highly trained, qualified and experienced in different fields who are creating innovative creative work. It seems absurd that the work they do when they are working in a traditional theatre or film editing studio is lauded as cultural, but the same work they create in the context of an immersive interactive experience is perceived as something else.

There is a craft to developing engaging and successful immersive work, there is a learning curve to understanding how to give audiences agency and how to tell stories that can have different paths for audiences and performers to explore. The people who create the best work are specialists in their field and are arguably creating some of the most exciting new cultural experiences both in the UK and internationally.

Can an escape room be a culturally artistic achievement? Absolutely yes! The pinnacle of the genre draws you into a complex story within immersive environments that make you forget you are in a game, enveloping you in the story whilst you navigate the puzzles on your journey.

In any immersive genre, the environmental design could be done by a theatre designer, the game design by a VR game writer, the actors rehearsed by a theatre director working from a script developed by a film writer. On their own turf, these would be recognised as achievements in their field - the medium may be different but the creative skills and endeavour is the same.

Does this make **every** immersive experience **artistically** significant? Well no, in the same way that other cultural traditions are broad churches creating work ranging from the ambitiously artistic through to the pure entertainment, there is a breadth of immersive work being made for different purposes that aims to connect with different audiences on different levels. As with other artforms, creatively some work is wildly successful and other work may miss the mark, but whilst not every immersive experience is a masterpiece - when they are both artistically ambitious and successful they deserve to be celebrated as such.

Even though our data shows that our audience sample engages with various other forms of culture, what should also not be underestimated is an immersive experience's ability to be a gateway to other cultural experiences for new audiences.

The Moonwalkers: A Journey With Tom Hanks at Lightroom. Photo: Justin Sutcliffe

“One show that already has data is Immersive Everywhere’s Gatsby, which has run in several UK and Irish cities. It began its life in a pub in York in 2015 and returned with the York Theatre Royal in 2018.

“Fifty percent of our audiences had never been to a York Theatre Royal show before,” says Brian Hook, co-owner of Hartshorn-Hook and Immersive Everywhere.

“A little more than 50% of that segment, so 25% of all our audience, went on to book a York Theatre Royal show. This line of non-traditional work can be an incredible gateway for audiences who might feel that theatre isn’t for them.”

Anna James - **The Stage**

In fact even Arts Council England’s own research makes the case that Immersive theatre is attracting younger, more diverse audiences.

“Despite in-principle criticisms of site specific and immersive work, these styles of theatre remain popular (including – and perhaps especially – with younger audiences). In the words of one consultee “many of these pieces are genuinely reaching a new audience which is bored of the stagnation within the current theatre sector and looking for more. Hybridisation seems to have appeal”.”

Analysis of Theatre in England - *Arts Council England*

The UK is a global leader in the immersive sector and in order to remain so will need to be recognised as a credible and valuable part of the wider Creative and Cultural Industries ecosystem **estimated to be worth over £124bn**.

We are currently working in an incredibly hostile environment for the arts but also an exciting time for the recognition of the Creative and Cultural Industries as one of the few growth sectors within the UK economy.

We need to ensure that live immersive experiences have a seat at the table when the future of the Creative and Cultural Industries in the UK and beyond is being shaped. We hope that reports such as this will be a vital tool for demonstrating our current impact and future potential as a discreet sphere of the creative industries.

It is only as a united, creative collaborative community that we will be able to advocate for ourselves and ensure that our voices and practices are included in the future plans of the UK and beyond.

Conclusions

Our research shows an audience that is both geographically and demographically diverse already engaging with immersive experiences across the UK. Encouragingly there is also massive potential for growth with the majority of respondents interested in exploring the immersive genres they haven't experienced before.

Immersive audiences are primarily made up of people wanting to engage in real life communal experiences, with games and with stories. They are culturally engaged, but there is huge potential for traditional cultural institutions to engage with new audiences through immersive and interactive work.

For creators, the balance between providing both an experience that feels both value for money and high quality is critical. Creating creatively engaging work is vital, as is being able to market and describe it well to potential audiences for it to be commercially sustainable.

In the UK there are many organisations set up to support the growth and advocate for development of the traditional arts sectors, and we unfortunately live in a time when those sectors need that support like never before.

There are various industry groups and associations who are setup to advocate for theatre, dance, museums, and heritage sites.

The UK film sector has support through multiple organisations like BAFTA and the BFI, and the UK gaming industry has an effective industry group called the **UKIE** to support the growth of the UK computer gaming & interactive entertainment sector.

The **Immersive Tech Network** (formally Immersive UK) is the government body responsible for funding and fueling the growth of the immersive technology sector in the UK and whilst some of the funding does find its way into location based AR/VR projects, the organisation's focus isn't live immersive experiences.

The growth of the live immersive experience sector in the UK deserves to be similarly supported and advocated for. The importance of the immersive sector in the creative employment ecosystem shouldn't be underestimated - we have observed that an increasing number of performers, designers, directors and creators subsidising their work in traditional culture by also creating immersive work. This work sustains them as creative professionals and contributes towards their professional development, allowing them to develop new skills in different artistic formats.

The UK is a world leader in creating immersive and interactive experiences, the proof is in the number of major international cities looking to London to try and replicate the success of experiences created here for cultural, commercial and placemaking purposes within their own cities. With the right support, the UK can continue to be an artistic hub for developing extraordinary human experiences and continue to lead creative innovation within this fast growing cultural sector.

Future Research

We hope that this report will become an annual publication to help chart the longitudinal data showing the development of immersive audiences in the UK. We are actively looking for commercial and academic partners who would be interested in collaborating on future projects, or producers who would like to gather market research for potential new projects alongside our report data collection.

In future reports, we hope to raise the funding to be able to collect a representative sample of the UK in order to be able to chart the overall population's engagement with immersive work on a regional basis. We also hope to work with The Audience Agency to extend their **Audience Spectrum** to immersive work and compare results with their **Cultural Participation Monitor.**

Lastly, we intend to try and create a separate industry report to try and quantify the size of the live immersive sector in the UK and its economic impact on the creative economies. If you are interested in partnering with us on this then please contact us at:

research@immersiveexperience.network

Immersive Design Symposium 2023 Photo: James Wills

Immersive Experience Network

Authors

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Entourage were the production delivery partners for Secret Cinema from 2016 - 2020 with Andy taking the Production Director role on shows including Moulin Rouge, Blade Runner, Romeo _ Juliet, Casino Royale and Stranger Things. They have also supported the installation and opening of 'Jeff Wayne's War of the Worlds - The Immersive Experience', 'Monopoly Lifesized', 'Wishmas' and 'Bridge Command'.

Dr Joanna Bucknall

A performance maker and scholar. She is a lecturer at the University of Birmingham in the department for Drama & Theatre Arts, where her specialist areas include immersions and interactivity in performance, embodied performance documentation, practice-as-research methodologies and gamification of performance.

She is a producer and host of the podcast series 'Talking about Immersive Theatre' (TAIT). She is the Artistic Director of Vertical Exchange Performance Collective (VEX), Co-artistic Director of KeepHouse Performance and has been an Associate Artist at the New Theatre Royal in Portsmouth.

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As a newcomer to the immersive sector herself, Nicole is enthusiastic about creating the Immersive Experience Network as a platform for industry visibility and new connections. Alongside Project Management, Nicole is also a science communicator promoting science engagement for live audiences.

Report Designed by Will Hood at Northouse.

Northouse is a UK-based branding and design studio. Our studio is a collective for talented creatives with exceptional skills and expertise. All commonly grounded by the shared joy and motivation of creating great work for good people and innovative brands.

Contributing Editor - Sheena Patel at YonderBeyond.

Immersive Experience Network

Report Partner

medea

Medea is a creative production company harnessing the arts to create purpose-driven work. They aim to illuminate the production, circulation, digestion and impact of information, so that people can be empowered to make factually informed choices.

The executive team is comprised of Founder and Concept Creator, **Liana Patarkatsishvili**, Executive Producer **Amy Rowe**, Director, **Topi Lehtipuu** and Director of Wellbeing & Engagement, **Tayyaba Jordan.**

Liana Patarkatsishvili is a Georgian International Relations and media professional. Liana's father, Badri Patarkatsishvili, founded Georgia's national independent TV and radio stations, where Liana served as CEO. With a degree in Public relations from the Moscow State University of International Relations, Liana has worked in various advertising and publishing positions and on major TV channels in Russia and Georgia.

Amy Rowe has over 12 years of experience in live event production, specialising in immersive theatre performance design and delivery. Amy founded AVR in 2022 which focuses on immersive design for the private sector.

Topi Lehtipuu was the CEO and artistic director of the Helsinki Festival, an innovative multi-arts festival and a major event in Finland's cultural calendar. He has programmed world's leading artists from David Hockney to Cate Blanchett. He has commissioned works for various media, often with a multidisciplinary ethos. As a classical tenor, he has performed on the major stages and festivals and features in numerous recordings, having been nominated twice for a Grammy.

Tayyaba Jordan is an award-winning, motivational keynote speaker and executive peak performance coach for global industries. She has worked with finance and media conglomerates and individuals to amplify their professional and personal excellence through time-efficient strategies. She also holds 25 years full and varied experience across all genres of TV, film, drama and commercials as an Art Director and set designer.

Immersive Experience Network

Our Industry Partners

The Immersive Experience Network's work is only possible due to the support of our founding industry partners who have contributed towards the publication of this research.

Entourage
A production and project management consultancy that specialise in live Immersive production. They are experts in meanwhile use development and partner with creative clients, agencies and brands to develop Immersive concepts ideas into successful productions.

Illusion DC
Based in Belvedere, South-East London, Illusion Design and Construct are an industry leading scenic construction fabrication producing scenery across all sectors of the entertainment industry. Their workshops offer support to designers and creative teams across the world in creating some truly unique experiences and constructions.

Mance Communications
An industry specialist in immersive and experiential-led venues and events, Mance are proud to have been at the forefront of this growing sector, one of the first to acknowledge the value of this market. Mance also provide brand consultancy, business development and incubation for this sector.

Clockwork Dog
Provide show control & custom tech solutions for anything interactive, including immersive theatre, experiential marketing, escape rooms, miniature golf and museum exhibits. With seasoned experience across all these sectors, their team of designers, developers, programmers and installers will deliver your most creative ambitions that you didn't think possible. Plus, by using their revolutionary show control system, COGS, they can solve problems out of the box, allowing you to move fast, be cost efficient and concentrate on what makes your projects special.

Scene2
Experts in design & production for the Immersive experiential industries. Scene2 has been designing and building with innovation, craftsmanship and theatrical flair since 1999, providing design-led immersive scenic services for over 20 years to brands, agencies, charities, film and theatre. Based in Essex, Scene2's large studio and workshop offers design & production under one roof along with storage facilities for repeat clients.

Little Lion Entertainment
Founded to create a game-changing experience; one in which YOU are the star of the show. LLE are the creators of the award-winning and smash hit Crystal Maze Experiences in the UK & Middle East. The London theatrical attraction has been running since 2016 and the Manchester attraction since 2017. In the UK alone The Crystal Maze Experiences have welcomed over 2 million guests. LLE also opened Tomb Raider: The LIVE Experience in London in 2022 and are the creators of the video-game live experiences The Games Arenas; which include the Chaos Karts attractions in Manchester & Dubai.

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Unlocked Vision
Established by a collective of experienced industry individuals to design and build themed attractions that offer a variety of guest experiences. Their projects are wide and varied, from scare attractions and events, to immersive theatrical experiences, actor led shows, and themed environments. A true turn key production company. Producing bespoke, award-winning creative designs, working to a set brief or working to create an experience that fulfils the clients needs and provides a marketable and achievable business solution.

White Light
A complete technical solutions specialist operating in a range of markets such as theatre, corporate events, broadcast, live music, themed attractions, education, retail and leisure. Over the past 50 years, they have forged a reputation for supplying technical solutions including lighting, audio, video and rigging to projects of all sizes across the UK, Europe and worldwide.

d&b audiotechnik
Provides professional audio technology and solutions to accurately transfer passions through high-end quality speech and music reproduction. d&b audiotechnik is internationally regarded as a leading company for sound reinforcement systems in installed and mobile applications, with a reputation for quality of construction, standard of service, system integration principles, and pioneering technological development.

Vista Insurance
With over two decade's experience dealing with the creative industries, our team's in-depth understanding of the exposures you face mean that we can work with you and insurers to limit your risk and provide unique insurance programmes that provide more comprehensive cover, and in turn, aim to save you time and money in the event of a claim