

**LEAGUE OF WASHINGTON THEATRES  
AUDIENCE SURVEY:  
2000 AND BEYOND  
EXECUTIVE SUMMARY**



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## Overview & Methodology

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**T**he League of Washington Theaters has just completed what is thought to be the largest theater audience survey ever undertaken outside New York. The study was conducted by Shugoll Research, Bethesda, Maryland, and funded jointly by the Eugene and Agnes E. Meyer Foundation and Shugoll Research. All theaters that are members of the League and that mounted productions in 1999-2000 were invited to participate. Of the 35 theaters with productions running, 29 participated in the survey. A total of 6,965 questionnaires were completed. The study provides baseline data on who attends the theater in the Washington area. It will be conducted in 2-year intervals to track how audiences are changing.

Self-administered questionnaires were distributed in each theater by leaving them on randomly selected seat locations. Respondents completed the surveys either before a performance began or at intermission. Completed questionnaires were picked up by ushers or left in specially designed collection boxes.

In order to capture as diverse an audience as possible, theaters distributed questionnaires at two different productions, one in the fall and one in the winter. For each production, questionnaires with pencils attached were handed out at three performances: a weekday evening performance, a weekend evening performance, and a matinee performance. Special performances (opening nights, benefits, student matinees, etc.) were excluded.

At larger theaters (200 or more seats), 600 questionnaires were distributed equally across the six performances. At smaller theaters, 300 questionnaires were distributed. The project team anticipated a response rate of about 50 percent. The actual response rate was 57 percent, although it varied greatly across theaters. Some theaters encouraged participation through stage announcements, ushers walking through the hall asking for completed questionnaires, and other means.

The collected data were weighted based on the share of the Washington area's theater audience for each theater (using statistics compiled by the Helen Hayes Awards). In addition to presenting data for the Washington metro area's theater audience, one of the benefits of this study is that separate reports are being developed for each theater about its individual audience. These are studies that many theaters could not afford to conduct on their own.

## Findings and Conclusions

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- **Conclusion - Washington theater audiences are not demographically representative of the metropolitan area's population (all area data are U.S. Census, 1990, unless otherwise indicated). Theater audiences tend to be older, wealthier, better educated, and include more Caucasians, women, and DC residents. Younger theater audiences are somewhat more diverse than older audiences.**
  - *The mean age of theatergoers is 44.8 years (versus 34.8 years for the metro area) (U.S. Census Bureau, 1998). Although they make up only 17 percent of the area's population, almost one third of theatergoers (32%) are age 55 or older.*
  - *The average income of theatergoers is \$97,800 versus \$76,300 for the metro area population (adjusting 1990 U.S. Census Bureau figures to 2000 dollars). Twenty-one percent of theatergoers have incomes of \$150,000 or more versus 8 percent of the metro population (in 2000 dollars).*
  - *While the metro area is about 68 percent white (U.S. Census Bureau, 1998), theatergoers are 83 percent white. Conversely, the area is 32 percent non-white while theatergoers are 17 percent non-white. More specifically, African Americans represent 25 percent of the metro population and 11 percent of the theater attendee population. Hispanics represent 7 percent of the metro population and 2 percent of the theater attendee population. Asians represent 7 percent of the metro population and 2 percent of the theater attendee population.*
  - *While 14 percent of theatergoers age 35 and older are non-white, this percentage increases to 24 percent for those 25 and under and 26 percent for those 26 to 34 years old.*
  - *Among people 18 years and older, 14 percent of the metro population has a graduate or professional degree versus 44 percent of theatergoers.*
  - *Women are 51 percent of the metro population (U.S. Census Bureau, 1998) and 61 percent of the theatergoing population.*
  - *DC represents 12 percent of the area's population (Metropolitan Washington Council of Government, 1991) but, among theatergoers, 25 percent reside in DC. Northern Virginia (42% of the population) is significantly underrepresented among theatergoers (32% are from Virginia). Suburban Maryland represents about 46 percent of the metro population and 43 percent of the area's theatergoers.*



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➤ **Conclusion - Like theaters around the country, Washington area theaters attract few children and young adults.**

**Nevertheless, many theatergoing adults will occasionally bring children with them, and the number who say their children attend theater with school groups is very high.**

- *Nine percent of the theater audience is under age 18 (the percentage of the metro population age 5 to 17 is about 17 percent, U.S. Census Bureau, 1998) and 15 percent is under age 25 (although the percentage of the population age 5-24 is 26%). Looked at another way, 8 percent of theater audiences are in elementary or secondary schools (K-12) (another 1% are children who have not yet started school), 5 percent say they are college students, and 5 percent are in graduate school. The net of the audience now in school is 18 percent.*
- *Excluding children's theater, those under age 18 are slightly more likely to attend the area's larger than smaller theaters and presenting theaters rather than those that produce their own work. This parallels findings in New York (Theatre Development Fund, 1998 New York Theatre Audience Survey) where children more often attend Broadway productions than Off-Broadway productions.*
- *The lack of young theatergoers is clearly not a new phenomenon. Only 15 percent of adult theatergoers said they attended the theater frequently as a child. One third (32%) attended sometimes and over half attended either rarely (33%) or never (20%).*
- *Twenty-seven percent of theatergoers have children under the age of 18 living at home. Most theatergoers with children take them to the theater (71%). In fact, as many take their children to the theater three or more times a year (36%) as take them just once or twice (35%). The average number of times theatergoers' children attend a play or show is 2.7 times a year. Note that this study was with people who attend the theater. Among the general population, the number of parents who take children to the theater would be much, much lower.*
- *Over half (58%) of parents with children under 18 living at home say that their children have gone to the theater with a school group in the last year.*



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- **Conclusion - As expected, while the high cost of theater is a major deterrent to parents taking their children more, children's busy schedules and the perceived lack of age appropriate theater are also significant obstacles.**
    - *Nearly one of every three parents (31%) say they don't take their children to the theater more often because it is expensive (since there are a large number of discounted opportunities available for children, one might conclude that many parents aren't aware of them or the available opportunities are too restrictive to meet parents' needs). Conversely, price is not a deterrent to two out of three parents. There are two other significant obstacles besides cost: children are too busy with other things (27%) and parents believe there is little age appropriate theater (24%). Note that few parents say their children don't want to go to the theater (13%). Other deterrents mentioned by a few parents are their own busy schedules (14%) and a preference to attend only on special occasions like birthdays and holidays (11%).*
  
  - **Conclusion - Given the size of tourism in the DC area, Washington metro theaters do not seem to attract as large a segment of this audience as possible.**
    - *Seventeen percent of the audience at Washington area theaters is from out of town. This includes 14 percent of the audience that says it is visiting DC for pleasure/vacation and 3 percent visiting for business. Out-of-towners are about twice as likely to attend presenting theaters (22%) than producing theaters (12%) and, consistent with this, larger theaters (18%) than smaller (7%).*
  
  - **Conclusion - Theatergoers clearly pour additional dollars into area economies when they attend the theater, most often by eating out when they go to a show.**
    - *Over half of theatergoers (56%) say that, as part of attending the theater on the day they were surveyed, they will eat out at a restaurant. Over a third (39%) say they parked in a pay lot or garage, 8 percent did some shopping in or near the theater, and 5 percent hired a babysitter.*

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- *Consistent with the fact that many theatergoers parked in pay lots/garages, 75 percent say they drove to the theater (many parked in free spaces near the theater). Only 11 percent arrived by Metrorail (with another 1 percent by Metrobus), 6 percent arrived by chartered bus or school bus, 4 percent walked, and 3 percent took taxis.*

➤ **Conclusion - While a disproportionate number of theatergoers have Internet access, the Internet has not yet become a common source of theater information or ticketing.**

- *Eighty-nine percent of theatergoers have Internet access either at home or at work. By comparison, one study showed that 50 percent of the metro area's general population uses the Internet (Cyber Dialogue, 1999).*
- *Only 5 percent of theatergoers learned of the performance they attended through the Internet, although this is not much lower than the number citing television (7%) or radio (9%). The main source of theater information in Washington remains newspapers, with 30 percent specifically naming *The Washington Post* and 5 percent naming other newspapers, word-of-mouth from friends and acquaintances (24%), and information from the theaters themselves (27% are subscribers who cited information received about this production from theaters and another 11% of non-subscribers cited a theater brochure or mailing).*
- *Only 3 percent of theatergoers bought their tickets through the Internet (4% if only individual ticket purchasers are considered). The primary way of purchasing individual tickets remains the telephone (29% of all tickets purchased, 40% of individual tickets) followed distantly by in-person at the box office (13% total, 18% individual). Few buy individual tickets by mail order anymore (2% total, 2% individual). Over a quarter of all tickets purchased to area theaters (28%) are through subscriptions. About one out of ten tickets to area shows (10% total, 14% individual) were gifts to a theatergoer, 9 percent were purchased by a group or through a tour operator (12% of individual tickets), and similar percentages were purchased at the TICKETplace half price ticket booth and ticket brokers/hotel concierges (3% each total, 4% each individual).*



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➤ **Conclusion - Theatergoing is not an impulsive, last minute decision. Most plan to attend the theater way in advance.**

- *Only 7 percent of theatergoers made the decision to attend the same day they went to the theater. Another 18 percent decided to go 1 to 7 days in advance. Thus, one quarter of theater attenders make the decision within a week of attending and 75 percent plan further in advance. The largest number (45%) plan their attendance over a month in advance (although this includes subscribers).*
- *Among individual ticket purchasers, 9 percent purchased the day they attended and 25 percent purchased 1 to 7 days in advance. Sixteen percent bought tickets 8 to 14 days in advance, 23 percent 15 to 30 days in advance, and 27 percent more than 30 days in advance.*

➤ **Conclusion - Theatergoers vary in their frequency of attending with many going only occasionally, but a significant number going regularly. Frequency of theater attendance is affected by how often an adult attended the theater as a child.**

- *Nearly one in four respondents in the sample (24%) attended the theater only once in the past year. A similar number (25%) are avid attenders, going 10 or more times. In between, 19 percent attend two or three times a year, 13 percent four or five times, and 19 percent six to nine times. The mean number of times theatergoers attend is 6.7. Those under age 45 go to the theater less frequently than those 45 and older.*
- *Those age 18 and older who attended theater frequently as a child go to the theater more often as adults (8.5 times a year on average) than those who went rarely or never as a child (6.6 times a year). Presumably, this difference would be greater in a general population study that included non-theater goers than in this study that only surveyed theater attenders.*
- *Thirty-nine percent of theatergoers subscribe to some Washington area theater.*



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- **Conclusion - Ticket prices clearly limit how often people go to the theater. However, other factors also reduce the frequency of attending, particularly busy lifestyles and programming concerns.**
- *Over half of theatergoers (53%) say they would attend more often if prices were lower. Two other obstacles to increased attendance are a lack of free time (34%) and a lack of the type of theater respondents like (31%).*
  - *Perhaps because of their limited free time, respondents also cite a variety of convenience related issues that could increase their theatergoing. That is, theatergoers say they would attend more often if parking was easier (21%), they or the theaters were located closer to public transportation (7%), if tickets were easier to purchase (10%), and if they didn't have to find a babysitter (4%).*
  - *Only 7 percent of those surveyed said they would be unlikely to go to the theater more often under any circumstances.*