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ABSTRACT

In Surveys of Public Participation in the Arts (SPPAs) conducted in 1982, 1985, and 1992 by the U. S. Census Bureau, randomly-selected interview subjects (age 18+) were asked a series of questions relating to their participation in the arts through attendance at live performances, exposure via mass media, personal participation in the arts, interest in attending more often, childhood exposure to the arts, and related topics. This report focuses exclusively on participation in stage plays. U.S. participation in theater or "non-musical" stage plays increased from 11.9% of all adults in 1982 to 13.5% in 1992--an increase of 13.4% and the largest among the seven benchmark categories studied (jazz, classical music, opera, musicals, plays, dance, and visual arts). This analysis also examines the theater audience and its characteristics, and explores the dynamic forces shaping theater participation. Changes in producing and touring activity are discussed, as well as the evolving nature of the art form itself. (MM)

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American Participation in Theater

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NATIONAL ENDOWMENT FOR THE ARTS

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Executive Summary

According to a longitudinal study of arts participation sponsored by the National Endowment for the Arts, American participation in theater or "non-musical stage plays" increased from 11.9% of all adults in 1982 to 13.5% in 1992 — an increase of 13.4% and the largest increase among the seven "benchmark" categories studied (jazz, classical music, opera, musicals, plays, dance, and visual arts). According to Arts Endowment, "a non-musical stage play is a theatrical production consisting of spoken dialogue."

In similar studies conducted in 1982, 1985, and 1992 by the U.S. Census Bureau, randomly-selected interview subjects (age 18+) were asked a series of questions relating to their participation in the arts through attendance at live performances, exposure via mass media, personal participation in the arts, interest in attending more often, childhood exposure to the arts, and related topics. The numbers of completed interviews were 17,254, 13675, and 12,736, respectively. Results from these Surveys of Public Participation in the Arts (SPPAs) have been analyzed extensively in numerous research reports and monographs commissioned by the Arts Endowment. This analysis focuses exclusively on participation in stage plays. The author's overall approach is first to examine the theater audience and its characteristics, and then to explore the dynamic forces shaping theater participation. Changes in producing and touring activity are discussed, as well as the evolving nature of the art form itself.

Theater Participation

- Based on an adult population (18+) of 185.8 million, an estimated 25.1 million U.S. adults attended live stage plays in 1992, compared to 20 million in 1982 when the adult population was 164 million. Accounting for sampling error at the 95% confidence level, the true size of the 1992 theater audience was between 24 and 26.2 million adults.
- Among those reporting theater attendance, an average frequency of 2.4 times was reported (in the preceding 12 month period), yielding a total of 60.2 gross attendances at live stage plays. About 27.4% of the theater audience attends 3 or more times per year, compared to 22.4% of the audience for musicals, and 15.2% of the opera audience.
- A third of all survey respondents expressed an interest in attending stage plays more frequently than they do now, an increase of 9.4 percentage points since 1982 and the biggest increase for any of the benchmark activities. The potential audience for stage plays is composed of 10% current theater-goers

who do not wish to increase their participation, 25% current theater-goers who would like to attend more often, and 65% non-attenders with an expressed interest in going. A relatively large untapped audience for stage plays is suggested. Creating marketing and artistic "points of entry" for non-attenders is the implied challenge.

- Over half of all stage play attenders (53.2%) also reported attending musical theater in the preceding year, although only 41.1% of the musical theater audience also reported attending stage plays — indicative of the relatively broader appeal of musicals. Stage play audiences are most likely to be drawn from opera audiences (48.1% crossover), while just 11.7% of theater-goers "feed" the opera audience.
- Like other types of arts attenders, theater-goers are more active in other leisure activities compared to the general population. In 1992, 53.8% of theater-goers also attended sports events, down from 68.3% in 1982. The average theater-goer watches 2.4 hours of TV every day, compared to 3.0 hours for the average American. With the exception of exercise and charity work, participation by theater-goers in all other leisure activities declined between 1982 and 1992.

Audience Characteristics

- Education remains the single most important predictor of stage play participation. While 35% of those with graduate school education reported theater attendance, just 4% of those with high school education did so. Frequency of attendance also increases with education level.
- Income is most highly correlated with frequent attendance at stage plays. Households with incomes over $75,000 account for 17% of the theater audience compared to 26% of the opera audience, but only 9.5% of the general population.
- With respect to age, theater participation is somewhat more constant across age groups compared to other benchmark activities. The highest theater participation rate (17.2%) was observed among respondents aged 45 - 54, compared to a rate of just 6.7% for those aged 75+. An analysis of theater participation by age cohort (i.e., following those born between certain dates) suggests that participation has increased evenly across all cohorts except for those born before 1918 (the "Pre-World War I" cohort), whose participation declined sharply.
- Increased theater participation among non-White racial/ethnic groups is among the most significant findings of this analysis. Participation rates for African-Americans more than doubled from 5.8% in 1982 to 12.0% in 1992. Similarly, Hispanic participation in stage plays also rose from 5.5% to 8.6%. Audience diversification efforts in the non-profit theater field appear to have made a significant impact since 1982.

- Adults with no children comprise 81.4% of the audience for stage plays. Adults with young children (under age 6) are substantially less likely to participate in theater compared to adults with older children. Participation rises to near-average levels for adults with children ages 6 - 11, suggesting that the theater field is adept at re-capturing parents into the audience. Increases in the levels of children's programming since 1982 help account for this phenomenon.

Producing Activity

- Data provided by Theater Communications Group (TCG) suggests a small increase in the number of mainstage and other non-touring productions by non-profit theaters. For a sample of 42 theaters, the number of performances rose slightly from 13,304 in 1982 to 13,659 in 1992, while attendance rose from 6.4 million to 6.8 million, or 6.7%. Thus, it may be inferred that the 42 theaters became more proficient at filling their houses, although population growth between 1982 and 1992 should have driven attendance up by 13%, holding all else constant.
- The League of American Theaters and Producers (LATP) tracks commercial producing and touring activity. Commercial touring of stage plays decreased from 23 productions in 1982 (an average of 10.6 weeks each), to 10 productions in 1992 (an average of 21.4 weeks each). The shift to longer tours of fewer commercial productions may have resulted from several factors, including a decline in the number of new plays and play revivals on Broadway, the increasing costs of touring, and the opening of new commercial venues in cities like Palm Beach, Ft. Lauderdale, Cleveland, and Minneapolis/St. Paul.
- Among non-profit theaters, a renewed focus on ethnically- and culturally-specific works strongly corroborates the audience diversification observed since 1982, particularly among the African-American and Hispanic populations. Increased responsiveness to diverse constituencies became a major thrust of the funding community during this period. The growing popularity of performance art and solo performance (i.e., story-telling and monologue) undoubtedly had a positive impact on theater participation, particularly among young audiences.

The observed increase in theater participation between 1982 and 1992 is a gross measure — a broad representation of many underlying factors, some consistent with increasing attendance, some contradictory to it. Nevertheless, an attempt to reconcile demand for stage play programming (as measured by participation rates and frequency) with the supply of theater programming is a valuable, if inconclusive pursuit.

Local Context to Theater Participation

Another study conducted by the NEA in 1992 revealed some of the complex patterns of arts participation at the local level, adding rich context to data from the national surveys.[1] In each of twelve areas studied (ranging from San Jose to Chicago), arts participation rates were examined in light of the local supply of arts programs and facilities. Theater participation was highest in Seattle/King County (WA) where a thriving theater community was observed, including playwrights, actors, and a plethora of small, experimental ensembles known collectively as "Seattle's fringe theaters." The study concluded that the relationship between the supply of and demand for arts programming is anything but predictable. Dynamic forces shape participation patterns in each community, including characteristics of the resident and non-resident markets, the supply of producing and presenting activity, the availability of suitable performance facilities, as well as local traditions and history. Further research at the local level will add valuable context to theater participation in the U.S. and perhaps stimulate the transfer of audience development strategies across communities.

The Future Audience

Will public participation in non-musical stage plays continue to grow? Ten years from now, the field will have endured another decade of change. New theaters will open and others will fold; playwrights, directors, and actors will speak out in new ways; the funding climate will inevitably change; and new communications technology will create possibilities for both theaters and audiences.

How will the Theater make itself relevant to an increasingly diverse public? Much depends on the resources made available to theaters, playwrights, and performers to develop new work and attract new audiences. Most likely, the rising costs of producing and touring professional theater — coupled with changes in the funding mix for non-profit theaters — will create even more pressure on earned income. However, it is the developmental component of theater — free from commercial expectations — that ultimately creates renewal. Audiences will continue to change and grow as new works (and old works infused with new relevancy) bring the lives of more Americans closer to the theater. Responsibility for creating new work rests not just on the non-profit theater, but also on commercial producers, the funding community, and ultimately the audience itself.

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[1] Summary Report: 12 Local Surveys of Public Participation in the Arts, Research Division Report #26, National Endowment for the Arts, 1993

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I. Introduction

For nearly twenty years the arts participation patterns of Americans have been studied through a series of research efforts sponsored by the National Endowment for the Arts (NEA), including three nationwide Surveys of Public Participation in the Arts (SPPAs) conducted in 1982, 1985, and most recently in 1992. Results from these and other research efforts have advanced our understanding of the complex patterns of arts participation in the U.S. With data available from three surveys spanning a decade, broad trends in arts participation can be monitored, adding a new dimension to the collective knowledge of arts participation in the U.S.

This analysis focuses on participation in non-musical theater or "stage plays" — just one of the eight "benchmark" arts activities defined by the NEA. The goal of the analysis is to offer perspective on theater participation in the U.S. in terms of the *demand* for theater programming, the *supply* or availability of theater programming, and other forces impacting theater participation.

In terms of demand, a variety of quantitative measures have been developed through NEA-sponsored research, including attendance rates, frequency of attendance, and the demographic and other characteristics associated with attendance. On the supply side, measurement is substantially more difficult due to the diversity and constant state of flux of the theater field. Providers of theatrical programming include resident theaters, commercial producers, children's theater companies, presenters, broadcast media and other types of organizations.

The rapid evolution of the "theater delivery system" in the United States is driven by a number of inter-related forces:

- a constantly changing arts public, both demographically and culturally
- artistic developments in the theater field
- management and organizational changes among producers and presenters
- a changing funding and political climate
- technological advances
- economic forces that impact both consumers and producers

Thus, the simple observation that theater attendance increased 13% between 1982 and 1992 belies a panoply of underlying forces, some correlative and some contradictory. Ultimately, the changing patterns of theater participation are as

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rich, subtle, and complex as the art form itself. Theater — unlike the more wieldy artistic disciplines of opera, ballet, and even musical theater — easily speaks to contemporary audiences, not only through new plays but also through new interpretations of older works. The traditionally smaller scale of theater productions affords the art form an element of spontaneity (if not portability) and a facility for relevance that opera, ballet, and musical theater do not enjoy. If theater as an art form reflects our society and its search for identity and understanding, then the study of theater participation is a window looking into the cultural development of America.

The Surveys of Public Participation in the Arts

In response to a growing need to understand the changing arts participation patterns of Americans, the National Endowment for the Arts commissioned a scientific, longitudinal study called the Survey of Public Participation in the Arts (SPPA). Conducted by the U.S. Bureau of the Census, the first survey in 1982 established benchmark data from which trend analysis is now possible, with data from the second and third SPPAs in 1985 and 1992, respectively.

In terms of survey design, the SPPAs addressed these primary topic areas:

- rate and frequency of attendance live performances of jazz, opera, classical music, musical theater, museums, ballet, other dance, and non-musical stage plays (the eight "benchmark" arts activities), as well as several other types of arts programs
- arts participation through electronic media, including television, video, and radio
- interest in attending different types of arts activities more often
- participation in other leisure activities
- personal participation in the arts (e.g., painting, writing, playing an instrument)
- music preferences
- childhood exposure to the arts

Respondents to the SPPA were part of a larger, continuously rotating panel of randomly-selected respondents who had agreed participate in the research. Census Bureau population counts were used to draw the sample in such a way that all individuals living in households in the United States had a known and equal chance of selection.

The sampling frame used in 1992 was essentially the same as those used in the 1982 and 1985 surveys. All individuals aged 18 and older in the selected households were eligible for inclusion in the survey. Less than 20% of all eligible individuals were unable to be interviewed. Approximately 75% of the 1992 interviews were conducted by telephone, unlike the 1982 and 1985 SPPA surveys for which only 25% were conducted by telephone. Face-to-face interviews were conducted with respondents who could not be reached by telephone. Each interview took about eight minutes to complete for the first six months (January through June), and 16 minutes for the second six months, when a longer survey instrument was used.

This report analyzes a subset of 1,716 respondents who reported attending at least one non-musical stage play in the preceding 12 months. Roughly 81% of those theater-goers were interviewed over the telephone, while the remaining 19% of the interviews were conducted in person at the respondents' homes. The majority (54.3%) of the interviews with stage play attenders were conducted in the first six months using the short form. The analysis of leisure activities, arts lessons/classes taken, and interest in attending more often is based on yet another subset of 785 respondents who completed interviews during the last six months of the 1992 SPPA.

To facilitate analysis, additional research was conducted on trends in the theater field since 1982. Sources of data included the Theater Communications Group, the League of American Theaters and Producers, and numerous other agencies and individuals with perspective on the field.

II. Theater Participation in the U.S.

An estimated 13.5% of the United States adult population attended live dramatic theater at least once in a 12-month period preceding the 1992 study, compared to a rate of 11.9% from the 1982 study. Accounting for sampling error, the actual participation rate for live non-musical stage plays falls between 12.9% and 14.1% of the adult population at the 95% level of confidence. Table 1 summarizes stage play participation levels.

Over the decade between 1982 and 1992, attendance at stage plays increased by 1.6 percentage points (or 13%) — the largest increase of any of the benchmark arts activities.[2] Considering a decrease in musical theater attendance of 1.2 percentage points, the sum of attendance at both musical and non-musical theater changed little over the ten year period.

TABLE 1: Theater Participation in the U.S. 1982 - 1992	1982 (millions)	1985 (millions)	1992 (millions)	% Change 82 - 92
Overall U.S. Adult Population (18+)	164.0	170.6	185.8	+13.3%
Overall Participation Rate for Live Theater	11.9%	11.6%	13.5%	+13.4%
# of Adults	19.5	19.7	25.1	+28.7%
Frequency of Attendance (times per year)	N/A	N/A	2.4	N/A
Overall # of Attendances	N/A	N/A	60.2	N/A

TABLE 1: Theater Participation in the U.S., 1982 - 1992

Based on an adult population of 185.8 million, between 24 million and 26.2 million adults reported attending live stage plays in 1992. The average

[2]A change in the participation rate of 1.6 percentage points is not statistically significant at the 95% level of confidence. In other words, it is possible that this change is due to random error associated with the sampling procedure employed by the Census Bureau.

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frequency of attendance reported in 1992 was 2.4 times per year, yielding a total of 60.2 million attendances.

Interest in Attending More Often

A third of all 1992 SPPA respondents indicated that they desire to attend stage plays more often than they do now, an increase of 9.4% since 1982 and the largest increase for any of the benchmark arts activities. Only musical theater claims a larger percentage of interested respondents (36.2%), although the increase since 1982 has been only 3.8%.

Among non theater-goers, 28.6% said they would like to attend more often, compared to 68% of current theater-goers — the majority being infrequent or moderate attenders (1 to 3 times annually). Based on these data, the potential audience for non-musical theater may be projected as follows:

% of Adults	Potential Audience Segment
4.0%	Current theater-goers who do not wish to increase their participation
9.5%	Current theater-goers who would like to attend more often
24.7%	Non-attenders with an interest in attending stage plays

While some respondents may overstate their interest in attending more often, a relatively large untapped audience for stage plays is suggested, the majority of whom are non-attenders and may be new to the theater.

Reasons for not attending more often were studied in the 1982 and 1985 SPPAs as well as in the 1992 Local Area Arts Participation Surveys (LAAPS), a 12-city study focusing on local participation. Respondents in all three studies reported that the primary barrier to increased participation was lack of time, followed by cost issues (categories were pre-defined). Difficulty in ascertaining the more complex internal and external forces inhibiting arts attendance prompted the NEA to drop this topic area from the 1992 survey instrument. As an alternative to studying what keeps people out of the theater, some researchers are directing more attention to the circumstances surrounding first-time attendance.[3]

Cross-Over Participation

Over 85% of the stage play audience also reports participating in at least one other benchmark arts activity (see Table 2); only opera attenders (93%), ballet

[3] In 1995, the NEA commissioned a study of first-time opera attenders at ten different opera companies.

attenders (92%), and classical music attenders (89%) participate in other arts activities at a greater rate. More than half of all stage play attenders (53.2%) also reported attending musical theater, the second highest correlation among arts activities surveyed, following museum attendance. Conversely, only 41% of musical theater attenders also attended stage plays, reflecting a broader-based audience for musical theater. Opera attenders represent the largest source of cross-over attenders for stage plays (48.1%), while just 11% of play attenders also attend opera.

TABLE 2: Cross-Discipline Participation Rates	% of Stage Play Attenders who also attend ___	% of ___ Attenders who also attend Stage Plays
Museums	63.4%	32.0%
Musical Theater	53.2%	41.1%
Classical Music	40.0%	43.2%
Jazz	31.3%	39.7%
Other Dance	19.4%	36.5%
Ballet	15.7%	45.5%
Opera	11.7%	48.1%

Source: 1992 Survey of Public Participation in the Arts

TABLE 2: Cross-Discipline Participation Rates

Analysis of crossover participation is useful in understanding the inter-relationships of different arts audiences. At a tactical level, such information may be used by arts managers to inform the development of marketing strategies, particularly in the area of direct mail and telemarketing. For example, results suggest that mailing lists from opera and ballet companies should be the most productive for marketing stage plays.

Participation Via Mass Media

Participation in stage plays through various forms of electronic media declined significantly between 1982 and 1992. In 1982 over a quarter of respondents (26%) reported viewing dramatic theater broadcast on television. This has declined steadily to its current level of 17%, reaching an audience of 33.4 million annual viewers (television and VCR). The average number of annual viewings of dramatic theater performances through television or VCR is 8 per viewer, increasing the total number of viewings nationally to 267.2 million.

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Demographically, electronic media audiences for stage plays differ significantly from audiences who attend live performances. Notably, the education levels of media audiences are lower than the education levels of those who attend live theater. A quarter of live theater audiences (25.4%) attained a high school education or less, compared to over a third of video/radio theater audiences (36.7%). Income levels were lower for video/radio theater audiences as well, but not as significantly as education. With respect to age, video audiences also tend to be older; whereas one fourth (25.6%) of live theater audiences are 55 and older, slightly over one third (33.7%) of video participants are age 55 and older.

The video audience for non-musical theater is made up of both attenders and non-attenders of live performances. Among the respondents who reported attendance a live performance, 42% also watched a stage play performance on television or VCR. Interestingly, respondents who did not attend live theater in the last 12 months viewed theatrical performances on television and VCR more frequently than those who did attend live theater — 8.8 times annually versus 6.2 times, respectively. Just 3% of respondents who did not attend live dramatic theater in the last 12 months reported viewing a stage play via video.

TABLE 3: Participation Rates Via Mass Media	1982	1985	1992	Difference 82-92
Participation Rate Via Television	25.9%	21%	14.8%	-11.1%
Participation Rate Via Video	N/A	N/A	1.3%	N/A
Participation Rate Via Radio	3.8%	4%	2.8%	-1.0%

TABLE 3: Participation Rates via Mass Media

Dramatic radio broadcasts reach a very small audience; 3% in 1992 compared to 4% in 1982. The audience reached through this form of media is 5.6 million adults, the smallest radio audience measured.

Radio audiences for theater differ significantly from both live theater and video audiences with regard to gender and racial/ethnic composition. Over 52% of the radio audience is male, compared to 43.6% of live audiences and 45.3% of video audiences. Racially, the radio audience for theater is more diverse than the audience for live theater, with 14% fewer whites and more African-Americans, Hispanics, and Asian-Americans. As with video audiences, radio audiences for theater are less educated and have lower household incomes.

The decrease in participation via electronic media appears to contradict the audience potential implied by a growth in U.S. household VCR ownership and cable subscription levels. Among households with televisions, over 70% also own a VCR and nearly 60% subscribe to cable television — huge increases over 1980 levels. One explanation for the decrease in theater participation via

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electronic media may be a decline in theater programming on public television. Two series broadcast on PBS, *Great Performances* and *American Playhouse*, have decreased their programming of stage plays significantly in the last decade. In 1985, *Great Performances* offered nine different productions of dramatic theater; that number declined to three in 1992. As recently as 1990, *American Playhouse* offered a total of 18 programs, of which seven were non-musical theater. Out of a total of eleven programs, American Playhouse presented only three non-musical productions in 1992. The precipitous decline in the supply of theater programming on public television may be due to lower interest (or ratings) among viewers, lack of funding, or other reasons. The proliferation of cable programming may also account for declining participation in theater on television.

Theater Attendance and Other Leisure Activities

In order to gain perspective on arts participation in the larger context of leisure activity, the SPPA measures participation in a number of leisure activities. Findings suggest that people who participate in non-musical theater (and other arts activities) are more likely to also participate in unrelated leisure activities at a greater rate than the general population. For example, 83% of stage play attenders also went to the movies in the last 12 months, compared to only 58.5% of the total population. This pattern remains consistent for other leisure activities.

Theoretically, participation in other activities should reduce the amount of leisure time available for arts participation of any type. This notion is disproved, however, by the finding that respondents who engage in other leisure activities are in fact more likely than average to attend arts programs. This was referred to as "the more-more" principle by John Robinson in his analysis of the 1982 and 1985 SPPA surveys.[4]

There has been a general decline in participation in leisure activities among dramatic theater attenders over the last ten years. The most significant declines were experienced in home-based activities and amusement events, particularly home improvement activity (down 15%) and attending professional sporting events (down 14%). The only leisure activity for which participation increased was exercise; 78% of non-musical theater attenders report exercising in 1992, an increase of 5.2% from 1982.

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[4]John Robinson, Survey of Public Participation in the Arts: 1985, National Endowment for the Arts, 1987

TABLE 4: Participation in Other Leisure Activities, 1982 - 1992	1992 Total Sample	1982 Stage Play Attenders	1992 Stage Play Attenders	% Change 1982 - 1992
Amusement				
TV Hours	3.0	2.2	2.4	9.1%
Movies	58.5%	87.6%	83.4%	-4.8%
Attend Sports	36.4%	68.3%	53.8%	-21.2%
Visit Amusement Park	49.8%	63.7%	60.2%	-5.5%
Exercise/Sports Activities				
Exercise	59.3%	72.7%	77.9%	6.8%
Play Sports	38.5%	60.2%	55.0%	-8.6%
Outdoor Activity	33.8%	48.4%	48.0%	-0.8%
Charitable Activities				
Volunteer at Charity	32.3%	52.2%	54.1%	3.6%
Home-Based Activities				
Home Improvements	47.2%	70.4%	55.4%	-21.3%
Gardening	54.2%	74.3%	62.7%	-15.6%
Art & Crafts Activities				
Ceramics	8.3%	17.6%	12.7%	-27.8%
Textile Work	21.1%	39.6%	31.1%	-21.5%
Photography	11.7%	18.9%	19.2%	1.6%
Painting	9.7%	17.3%	15.4%	-11.0%
Creative Writing	8.7%		18.7%	
Compose Music	2.2%		3.3%	

TABLE 4: Participation in Other Leisure Activities

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III. The Theater Audience

Survey results suggest that the demographic characteristics of theater-goers have not changed significantly since 1982, with some notable exceptions. Five key demographic variables are examined in this section: education, income, age, race/ethnicity, gender, and marital status. Two geographical characteristics — type of area (e.g., urban, rural) and region — are also explored, as well as the impact of family life cycle (i.e., presence of children) on theater participation.

Education

As illustrated in the chart below, education remains the strongest demographic predictor of theater participation.

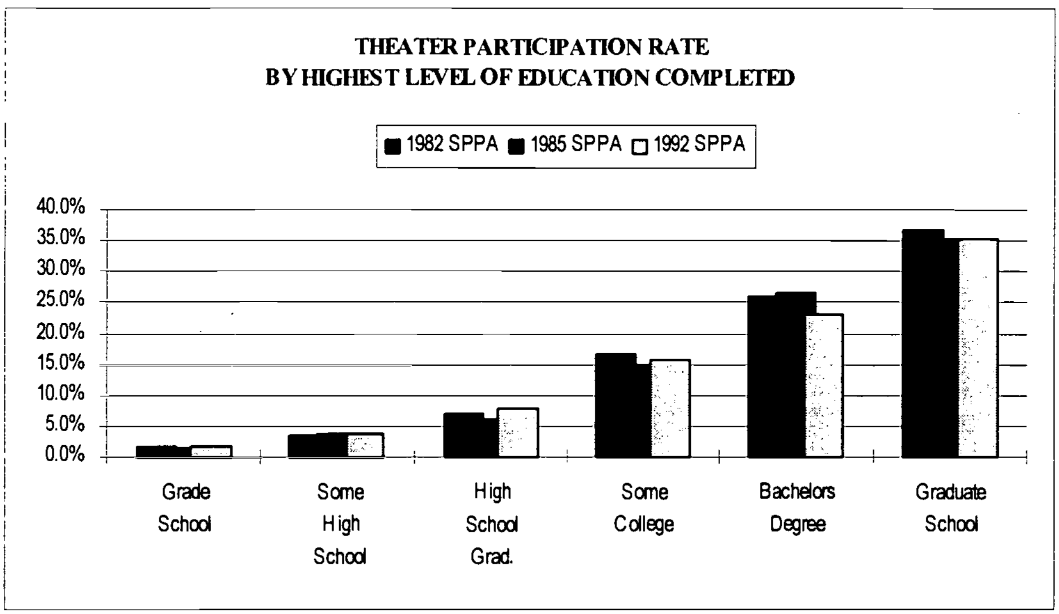

FIGURE 1: Theater Participation by Highest Level of Education Completed

A college graduate is twice as likely to attend a non-musical stage play as the average adult. The likelihood of theater participation increases by over two-and-a-half times the average rate for people with graduate degrees. Interestingly, participation rates have declined for respondents whose highest level of education is "some college" or more. Most notably, college graduates' participation rate decreased over 10% from 25.9% in 1982 to 23.2% in 1992. Conversely, participation rates for those with high school diplomas increased by 10% between 1982 and 1992.

Audience composition, on the other hand, reflects a significant increase for those with college or post-graduate degrees. Half of the stage play audience (49.9%) consists of people with at least a bachelor's degree, a more than 7% increase. A quarter of the audience (25.4%) is made up of respondents whose highest education level is high school or less, a decrease of 8.6% over ten years.

The decreased participation rate and the increased audience presence of those whose highest education level is a bachelor's degree or more are explained in part by the general trend towards higher educational attainment in the United States. According to the U.S. Bureau of the Census, between 1980 and 1990 the percentage of people 25 years old and over who had completed four years of college or more increased from 17% in 1980 to 21.2% in 1992, a growth rate of nearly 25%. By comparison, the SPPA growth rate during that period for those graduates who attended at least one stage play is 13.4%.

Frequency of attendance increases significantly for those with bachelor's or post-graduate degrees. Those who have earned a Bachelor's degree attend non-musical stage plays an average of 2.6 times annually, while those whose highest level of education is "some college" fall below the average of 2.4 times (ranging from a low of 1.7 times for those with some high school to 2.3 times for those with some college).

Income

Income has the greatest single effect on frequency of attendance. Based on a multiple regression model, income proved to be the strongest predictor of frequent attendance (six or more times). When controlling for outliers, individuals with household incomes of $75,000 or more are the most frequent theater attenders at 2.6 times annually. Frequency of attendance decreases proportionately with declining income levels.

Attendance patterns based on income parallel those for education because of their linear relationship. When annual household income exceeds $30,000, income becomes a factor in participation rates. Households with an annual income between $50,000 and $75,000 are nearly one-and-a-half times more likely to attend dramatic theater than the average household. Those with annual incomes over $75,000 are two-and-a-half times more likely to attend theater than the average household.

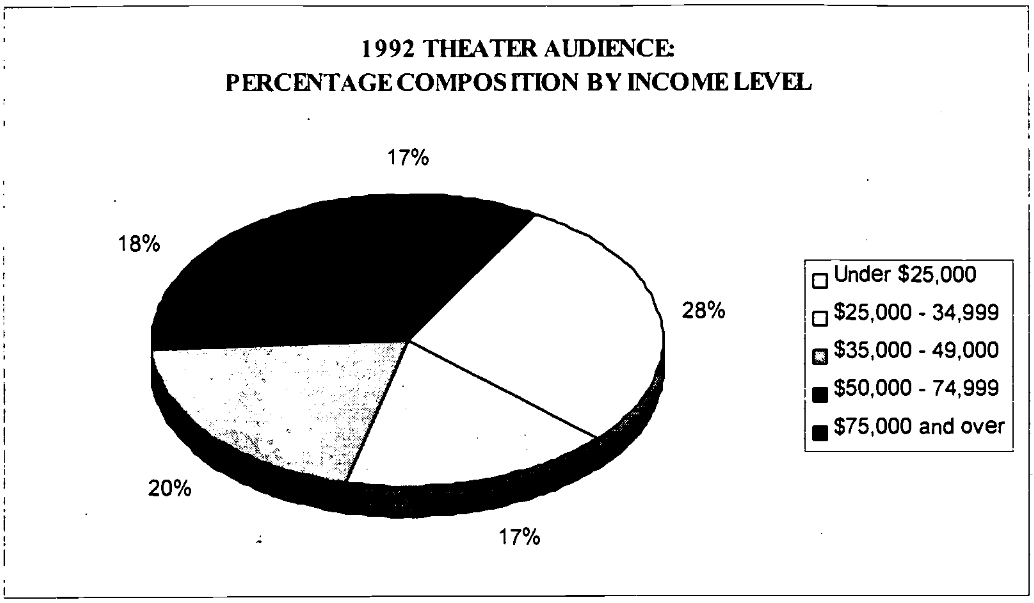

FIGURE 2: 1992 Income Levels for Theater Attenders

Households earning $50,000 or more comprise over 35% of theater audiences, but only 24% of the nation's households. This finding is further extended for those households earning more than $75,000. They compose 17% of theater audiences, but only 9.5% of the nation's households. The median household income for theater-goers is between $35,000 and $40,000 annually.

As with education, the decreased participation rate and increased presence in the audience of those respondents with income over $50,000 is explained in part by a significant increase in household income over the last ten years. Nationally, households with incomes of $50,000 or more grew at a rate of 23% between 1980 and 1990, compared to the stage play growth rate of 13.4% between the 1982 and 1992 SPPA.

Age

With the exception of respondents between ages 25 and 44, participation rates increased by nearly 25% since 1982. Respondents between 65 and 74 reported the highest increase in participation — 34%. Meanwhile, those in the "baby boom" age brackets reported an overall decrease in theater participation. Among respondents aged 35 to 44, theater participation decreased by 9.2%, while no change was observed among those aged 25 to 34.

Respondents between 35 and 64 attend live theater at a rate greater than the national mean (13.5%), with the highest participation coming from those 45 to 54 — 17.2%. The lowest participation rate for any age category is 6.7% for

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respondents aged 75 and older. However, this was nearly a 30% increase over their 1982 participation rate of 5.2%.

An alternative way to examine age data is through cohort analysis. A cohort analysis compares the years respondents were born rather than the ages of the respondents. For instance, responses of those between 25 and 34 in 1982 are compared to those between 35 and 44 in 1992. This analysis helps show the changes in participation and audience composition within a specific cohort group.

The age composition of theater audiences follows generational lines, growing older over the last ten years. In 1992, people between the ages of 35 and 44 — those classified as "Early Baby Boomers" — made up the largest portion of the theater audience (22%). This was also true of "Early Baby Boomers" in 1982, who composed 24% of the theater audience. By comparing age cohorts based on generational categories over the ten-year period, we find that audience composition changed significantly. All age cohorts experienced a significant decline in participation (except "Late Baby Boomers," which increased 5%). This is partly because people born between 1965 and 1967 were not eligible to answer the survey because they were under 18 in 1982.

TABLE 5: Theater Audience Composition by Age Cohort	1982 SPPA	1992 SPPA	% Change 1982 - 1992
Post Baby Boom (born 1968-1974)		12.7%	
Late Baby Boom (born 1958 - 1967)	15.6%	20.6%	5.0%
Early Baby Boom (born 1948- 1957)	24.1%	22.0%	-2.1%
World War II (born 1938 - 1947)	21.5%	19.0%	-2.5%
Depression (born 1928 - 1937)	15.2%	12.6%	-2.6%
Roaring 20s (born 1918 - 1927)	12.9%	9.7%	-3.2%
Pre-World War I (1917 and earlier)	8.1%	3.3%	-4.8%

TABLE 5: Theater Audience Composition by Age Cohort

Participation rates also cluster around generational lines. With the exception of respondents born prior to World War I, participation rates have increased between 1982 and 1992 for all age cohorts (see chart below). The greatest increase occurred for those classified as "World War II," (aged 45 to 54 in 1992) — moving from 15.3% to 17.2%.

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TABLE 6: Participation Rates by Age Cohort	1982 SPPA	1992 SPPA	% Change, 1982 - 1992
Post Baby Boom (born 1968-1974)		13.2%	
Late Baby Boom (born 1958 - 1967)	10.7%	12.2%	1.5%
Early Baby Boom (born 1948- 1957)	12.2%	13.9%	1.7%
World War II (born 1938 - 1947)	15.3%	17.2%	1.9%
Depression (born 1928 - 1937)	13.4%	14.9%	1.5%
Roaring 20s (born 1918 - 1927)	11.5%	13.3%	1.8%
Pre-World War I (1917 and earlier)	9.9%	6.7%	-2.2%

TABLE 6: Theater Participation by Age Cohort

Overall, results suggest that a major challenge for the theater field is increasing attendance among "Late Baby Boomers" and "Post Baby Boomers." People under the age of 35 comprise a greater proportion of the United States adult population (37.7% according to the 1990 Census) than are present in the non-musical theater audience (33.3%).

Race/Ethnicity

Among the most significant findings of this analysis is the increased participation in non-musical theater between 1982 and 1992 among non-White racial/ethnic groups. Theater participation rates for African-Americans have more than doubled in the last ten years, moving from 5.8% in 1982 to 12% in 1992. Similarly, Hispanic participation rates have also increased from 5.5% in 1982 to 8.6% in 1992. Asian-Americans were the only racial group whose participation declined slightly (-0.7%) from 1985 to 1992.

White respondents attend non-musical stage plays most frequently, at 2.5 times annually. African-American and Hispanics go to the theater 2.2 times annually, while Asian-Americans attend 1.5 times annually.

Audience composition by race/ethnicity also changed significantly between 1982 to 1992. White patrons comprise 82.4% of the 1992 theater audience, a decrease of 8.3% from 1982. The largest increase in audience composition was for African-Americans, increasing almost by a factor of two since 1982, from 5.2% of the audience to 10% in 1992. A similar increase in percentage composition among Hispanic respondents was observed, rising from 2.8% to 5.3% in 1992.

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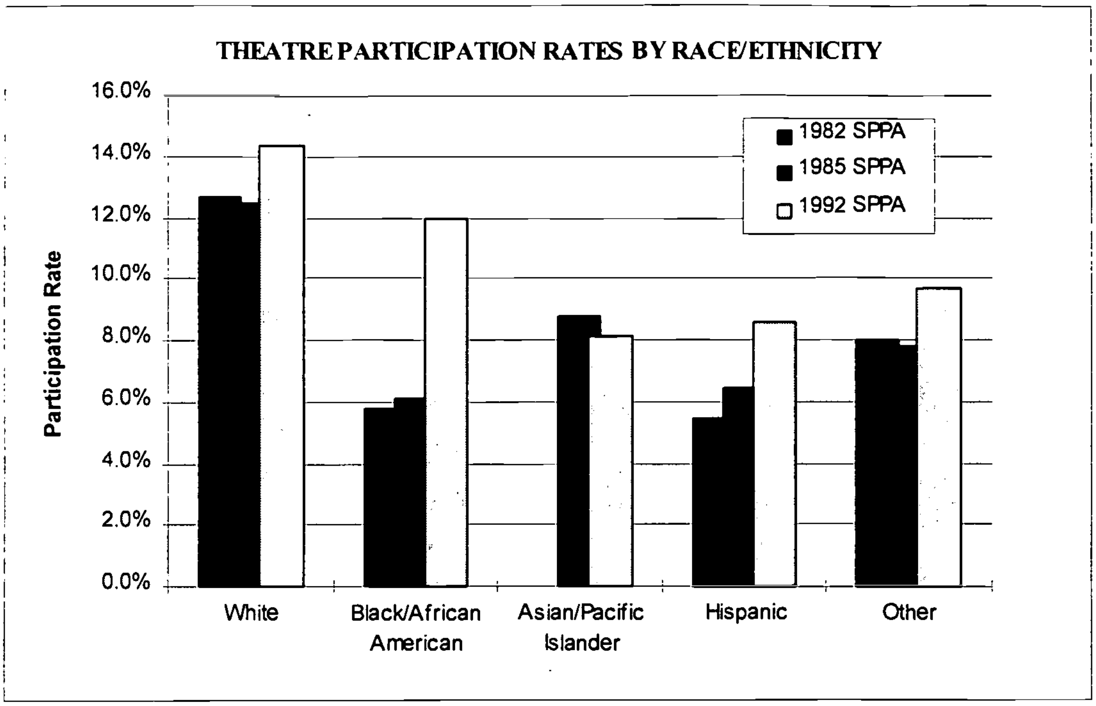

FIGURE 3: Theater Participation Rates by Race/Ethnicity

Gender

Females are slightly over-represented in the theater audience (56.4% compared to 51.3% of all U.S. adults), a slight decrease from 57.3% in 1982. Participation rates in non-musical theater have increased for both women and men, to 14.6% and 12.3% respectively in 1992, a noticeable increase from 1982 participation levels of 12.9% and 10.8%, respectively.

Marital Status

Respondents who are single or divorced attend theater at the highest rates — 15.8% and 15.4% respectively. Between 1982 and 1992, participation rates increased among all categories except "separated," which declined significantly. The largest increase in participation was for those who are widowed, rising by 3.6% the current participation rate of 11.2%. The largest portion of the theater audience — married couples — participates at a rate of only 12.9%, below the 13.5% average.

With respect to frequency of attendance, similar patterns are observed. Divorced respondents also attend at a higher frequency of 2.8 times annually, as well as those who are widowed (2.7 times annually). Single respondents attend theater an average of 2.4 times annually, while married couples attend 2.3 times annually.

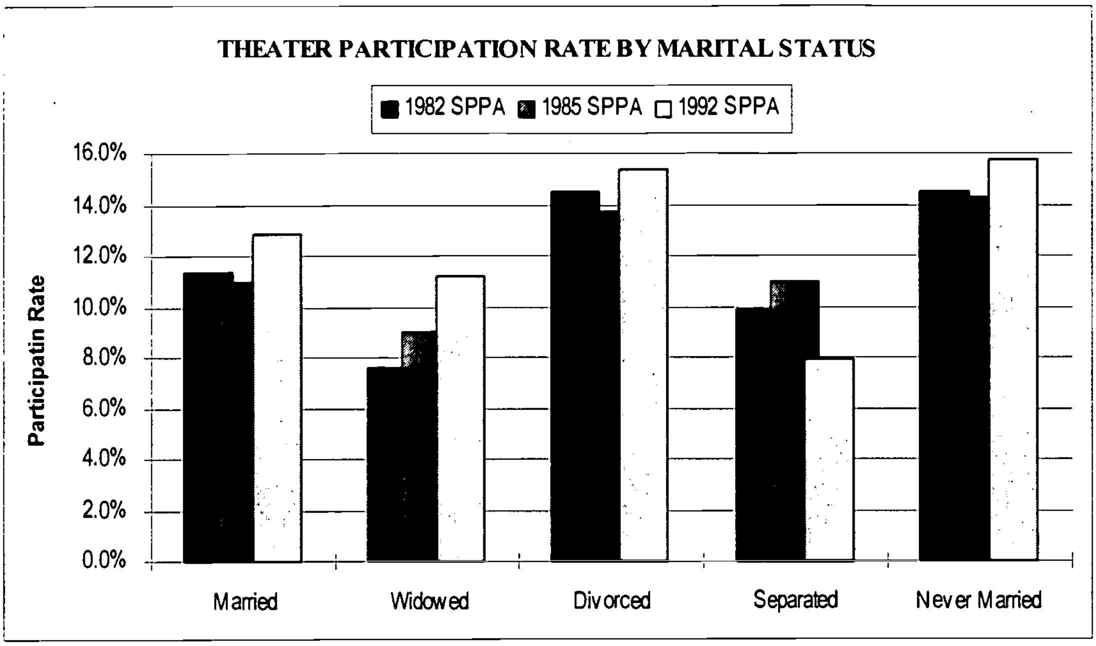

FIGURE 4: Theater Participation by Marital Status

The composition of dramatic theater audiences closely resembles the nation with respect to marital status. Married respondents account for 56.3% of the theater audience compared to slightly more than the 55% of all U.S. adults. Singles represent 26.5% of the theater audience, while divorced respondents account for 10%.

Type of Area

The type of area in which respondents live has a major impact on theater attendance. Once an individual is a theater-goer, type of area is the most significant determinant of participation. Residents of urban areas have the highest rate of attendance (15.9%) and the highest frequency (2.7 times annually). They make up 38.4% of dramatic theater audiences, up from 31.9% in 1982.

In many cases, the type of area in which a person lives (e.g. central city, suburb, or rural area) is directly associated with the availability of and access to theatrical programming. Generally the supply of dramatic theater offerings is greater in urban areas than it is in suburban or rural areas, creating increased opportunity for residents of urban areas to attend.

People living in suburban areas (within a Metropolitan Statistic Area or MSA) comprise 47.4% of theater audiences and have a participation rate of 14.2%. Center city residents constitute a somewhat smaller portion of the theater audience — 38.4%, but attend at a higher rate (15.9%) compared to their suburban counterparts. Only 8.5% of people living in rural areas attend non-musical theater. They make up 14.2% of the total audience, a decrease of over 9% since 1982.

Region

The geographical distribution of non-musical theater audiences may also be related to the supply of programming. Residents of the Northeast region, which includes cities such as New York, Boston, and Philadelphia (each with a long history of theater programming), have a higher participation rate, 15.8%, compared to residents of other regions.

A relatively high participation rate in the West (15%) can be associated with the nation's highest educational attainment — nearly half of all adults in the West region having completed at least some college. Significantly higher theater participation by African-Americans (17.7%) is also observed in the West, compared to 15.5% among Whites.

Participation rates in the Midwest (14.4%) are slightly above the national mean of 13.5%. Again, participation rates for African-Americans (17.6%) and other races (29.6%) are significantly higher than for Whites (13.9%) in the Midwest

The South has the lowest overall theater participation rate, 10.6%, which can be associated with a lack of theater programming in rural areas. Of the four geographic regions, the South has the largest rural population (31.4%), according to 1990 Census figures.

Presence of Children

Three aspects of family lifecycle impact theater participation:

1. if children are present in the household
2. the children's ages
3. the number of children in the household.

Children under the age of 12 are present in only 18.6% of stage play attender households. Participation among these individuals is below average at 10.6%, compared to 13.8% for those with no children at home. For stage play attenders with children, the strongest correlation to attendance relates to the children's ages. Generally, individuals living in households with children under the age of

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6 have a lower rate of participation, particularly if there is more than one child under 6 present. For example, respondents in households with children under the age of 6 participate at rates between 7%-10%, depending on the number of children. Participation rates increase substantially for households with children between the ages of 6 and 11, unless more than one child under 6 is present. Surprisingly, the highest participation rates are for individuals living in households with one child under 6 and more than one child between 6 and 11.

TABLE 8: Presence of Children	1992 Participation Rate	1992 % of Audience	1992 Frequency of Attendance
No children	13.8%	81.4%	2.5
One under 6	9.9%	4.3%	1.8
Two+ under 6	6.9%	1.6%	1.3
One 6-11	10.5%	4.3%	2.5
Two+ 6-11	12.4%	2.8%	3.3
One under 6, One 6-11	12.3%	3.3%	1.8
Two+ under 6, One 6-11	9.6%	0.7%	1.9
One under 6, Two+ 6-11	14.0%	1.2%	2.3
Two+ under 6, Two+ 6-11	6.9%	0.2%	1.0

TABLE 8: Theater Participation by Presence of Children

The presence of children in a household has a somewhat greater effect on frequency of attendance than it has on participation rates. Although individuals with one child under 6 and one child between 6 and 11 had a participation rate of 12.3%, their frequency of attendance was only 1.8 times annually. Frequency of attendance rates for individuals with children under 6 are all below the mean frequency of 2.4 times annually. Annual frequency of attendance for all other theater-goers is greater than 2.4 times annually.

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TABLE 9: Audience Composition by Demographic Segment	1982 SPPA	1985 SPPA	1992 SPPA	1990 Census	% Change 1982 - 1992
GENDER					
Male	42.7%	43.3%	43.6%	48.7%	2.1%
Female	57.3%	56.7%	56.4%	51.3%	-1.6%
RACE/ETHNICITY					
White	90.7%	89.7%	82.4%	80.3%	-9.2%
Black/African American	5.2%	5.6%	10.0%	12.1%	92.3%
Asian/Pacific Islander	N/A	1.3%	1.6%	2.9%	23.0%
Hispanic	2.5%	3.4%	5.3%	N/A	112.0%
Other	1.5%	0.0%	0.7%	3.9%	-53.3%
AGE					
18-24	15.6%	14.4%	12.7%	14.4%	-18.6%
25-34	24.1%	24.6%	20.6%	23.3%	-14.5%
35-44	21.5%	22.3%	22.0%	20.3%	2.3%
45-54	15.2%	15.1%	19.0%	13.6%	25.0%
55-64	12.9%	11.7%	12.6%	11.4%	-2.3%
65-74	8.1%	8.1%	9.7%	9.8%	19.8%
75+	2.6%	3.8%	3.3%	7.9%	26.9%
EDUCATION					
Grade School	1.8%	1.4%	1.0%	10.4%	-44.4%
Some High School	3.8%	4.0%	2.7%	14.4%	-28.9%
High School Graduate	22.2%	19.4%	21.7%	30.0%	-2.3%
Some College	26.9%	25.7%	24.9%	24.9%	-7.4%
College Graduate	22.6%	25.3%	24.2%	13.1%	7.1%
Graduate School	22.7%	24.2%	25.5%	7.2%	12.3%
INCOME					
Under $5,000	5.6%	5.6%	2.9%	6.2%	-48.2%
$5,000-$9,999	6.9%	5.0%	3.8%	N/A	-44.9%
$10,000-$14,999	11.8%	10.3%	5.9%	N/A	-50.0%
$15,000-$24,999	24.2%	19.1%	15.7%	17.5%	-35.1%
$25,000-$49,999	37.6%	37.2%	37.4%	33.7%	-0.5%
$50,000 +	13.8%	22.8%	34.2%	24.5%	147.8%
MARITAL STATUS					
Married	60.2%	58.4%	56.3%	55.0%	-6.5%
Widowed	4.9%	5.6%	7.1%	7.1%	44.9%
Divorced	7.6%	8.2%	10.0%	8.1%	31.6%
Separated	2.1%	2.7%	1.7%	3.3%	-19.0%
Never Married	25.1%	25.1%	26.1%	26.5%	4.0%
TYPE OF AREA LOCATED					
Central City	31.9%	30.5%	38.4%		20.4%
Suburbs	44.8%	50.2%	47.4%		5.8%
Rural Area	23.4%	19.3%	14.2%		-39.3%

TABLE 9: Audience Composition by Demographic Segment

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TABLE 10: Participation Rates by Demographic Characteristics	1982 SPPA	1985 SPPA	1992 SPPA	% Change 1982 - 1992
GENDER				
Male	10.8%	10.7%	12.3%	13.9%
Female	12.9%	12.4%	14.6%	13.2%
RACE/ETHNICITY				
White	12.7%	12.5%	14.4%	13.4%
Black/African American	5.8%	6.1%	12.0%	106.9%
Asian/Pacific Islander	N/A	8.8%	8.1%	-8.0%
Hispanic	5.5%	6.4%	8.6%	56.4%
Other	8.0%	7.8%	9.7%	21.3%
AGE				
18-24	10.7%	10.4%	13.2%	23.3%
25-34	12.2%	11.9%	12.2%	0.0%
35-44	15.3%	14.3%	13.9%	-9.2%
45-54	13.4%	13.4%	17.2%	28.3%
55-64	11.5%	10.5%	14.9%	29.6%
65-74	9.9%	9.8%	13.3%	34.3%
75+	5.2%	7.2%	6.7%	28.8%
EDUCATION				
Grade School	1.7%	1.5%	1.7%	0.0%
Some High School	3.6%	3.9%	3.7%	2.8%
High School Graduate	7.1%	6.0%	7.8%	9.9%
Some College	16.5%	14.8%	15.9%	-3.6%
College Graduate	25.9%	26.7%	23.2%	-10.4%
Graduate School	36.7%	35.4%	35.4%	-3.5%
INCOME				
Under $5,000	7.2%	8.1%	7.6%	5.6%
$5,000-$9,999	5.5%	4.3%	5.7%	3.6%
$10,000-$14,999	8.1%	8.4%	7.0%	-13.6%
$15,000-$24,999	10.3%	9.1%	10.9%	5.8%
$25,000-$49,999	17.9%	14.2%	13.7%	-23.5%
$50,000 and over	33.8%	28.4%	24.2%	-28.4%
MARITAL STATUS				
Married	11.4%	11.0%	12.9%	13.2%
Widowed	7.6%	9.0%	11.2%	47.4%
Divorced	14.5%	13.7%	15.4%	6.2%
Separated	9.9%	11.0%	7.9%	-20.2%
Never Married	14.5%	14.3%	15.8%	9.0%
TYPE OF AREA LOCATED				
Central City	14.1%	13.1%	15.9%	12.8%
Suburbs	13.2%	14.2%	14.2%	7.6%
Rural Area	8.5%	7.1%	8.5%	0.0%

TABLE 10: Theater Participation by Demographic Segment

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IV. Producing Activity, 1982 - 1992

In addition to changing demographic and cultural forces, theater participation is also influenced by the amount and types of theater programming available to the public. At the national level, the availability of live, professional non-musical theater programming is difficult to quantify, although two service organizations, Theater Communications Group (TCG) and the League of American Theaters and Producers (LATP), compile supply-side data from certain theater companies and Broadway producers. Two categories of supply are discussed in this section: touring and non-touring productions. These and other "macro" trends push the theater participation rate in one direction or another. With many different forces at play, the observed increase in live theater participation between 1982 and 1992 may be attributed to supply factors, changes in audience characteristics, or most likely a combination of the two.

At the local level, reconciling attendance levels with the supply of theatrical programming becomes feasible, particularly in smaller communities. Such was the goal of a 1992 study of arts participation in 12 communities across the U.S., commissioned by the NEA and sponsors in each area. A great deal was learned about the dynamic forces that shape arts participation in different communities. To date, however, researchers have yet to reconcile the number of reported attendances (by survey respondents) in a community with the actual number of attendances.

What has been learned from existing research is that the traditional economic principle of supply and demand has little bearing on the production and consumption of non-musical theater. Rather, research has shown that increases in the supply of theater can also stimulate new demand, sometimes leading to an upward "spiraling" relationship. Seattle's thriving theater community — with theater participation rates over twice those of other large markets — provides and excellent example of the non-traditional marriage between theater and its public.[5]

A variety of factors impact the supply of live theatrical programming in any given area, including:

- the availability of suitable venues
- the existence of theater companies, producers, and presenters — and their effectiveness as organizations
- artistic vision (i.e., selection of works to be offered) and quality
- competitive forces, both in terms of the arts and other leisure activities
- political, economic, geographical, and other characteristics of the area

Additional research at the local level is needed to gain important context on the complex relationship between theater participation and the availability of programs.

Non-Touring Productions

In cooperation with Theater Communications Group, the national organization for the professional non-profit theater, a sample group of 42 theaters was established. These theaters were selected from TCG's *Theater Facts*, an annual survey of TCG members that analyzes data relating to attendance, production schedules, earned and contributed income, and expenses. The composition of the sample group included only those theaters that completed surveys each year between 1982 and 1992.

Aggregate attendance for the sample of theater companies increased from 6.4 million in 1982 to 6.8 million in 1992 — an increase of 6.7% over the ten year period. Several factors may have contributed to this gain. While the number of productions actually decreased among the sample theaters, the number of performances per production rose. In 1982, 13,304 performances of 760 productions were reported. By 1992, the ratio increased significantly to 13,659 performances of just 655 productions. The most dramatic change was observed for mainstage productions, for which the number of performances per production increased from 28.6 in 1982 to 42.2 in 1992.

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[5] Further discussion of this idea may be found in Summary Report: 12 Local Studies of Public Participation in the Arts, Research Division Report #26, National Endowment for the Arts, 1993

Thus, while the number of performances increased just 2.7% between 1982 and 1992, attendance rose by 6.7%, suggesting an overall increase in "percentage capacity filled" by the theaters, assuming capacity (i.e., seat count/venue size) remained constant.

Supply vs. Attendance at 42 Theatres (source: TCG)	1982	1985	1992	% Change 1982-1992
Total Attendance	6,408,252	6,669,051	6,835,247	6.66%
# of Performances	13,304	14,812	13,659	2.67%
# of Productions	762	754	655	-14.04%
Avg. Length of Run	17.46	19.64	20.85	19.44%

TABLE 11: Supply vs. Attendance at 42 Theaters, 1982 - 1992

The supply of theater programming also increased in several other areas. Children's programming increased by nearly 22% over the ten year period, while special productions increased by over 45%. Only booked-in events experienced a decline, falling to one-third of the level of ten years ago.

The League of American Theaters and Producers Inc., the national trade association for Broadway Theater producers and presenters, tracks producing activity and attendance figures for both Broadway and touring commercial shows.[6] Unlike non-profit professional theater, overall attendance for commercial theater declined by 2.7 million between 1982 and 1992, which many attribute to a decrease in the number of new shows. From 1982 to 1992, the number of new plays and play revivals on Broadway decreased from 29 to 19.

Touring Productions

Based on the TCG sample group of 42 theaters, the number of touring productions by non-profit professional theaters declined sharply over the last ten years from 66 productions at 28 theaters in 1982 to only 26 productions at 14 theaters in 1992. The economics of touring changed dramatically during this period, with longer tours needed to amortize production costs. In 1982, each

[6]LATP classifies productions as new plays, play revivals, new musicals, musical revivals, special attractions, and return shows.

touring production ran for 33 performances, rising to 44 performances per production in 1992, an increase of one third.

The availability of commercial touring plays varies considerably from year to year, and is dependent to a large extent on production activity on Broadway. In the 1982-83 season, a total of 23 productions toured an average of 10.6 weeks per production, dropping to 10 non-musical productions at an average of 21.4 weeks on tour for 1992-93.

Prior to the mid-1980s only cities with established theater communities could sustain touring commercial theater. During the economic expansion of the mid-1980s, new or renovated performing arts facilities opened across the U.S. in cities such as Palm Beach, Ft. Lauderdale, Costa Mesa, Cleveland, and St. Paul — increasing the length of commercial theater tours, and creating new availability of commercial non-musical theater in many areas.

Ticket Prices

Ticket prices are another factor influencing theater participation, as well as the willingness of audiences to pay them. Between 1982 and 1992, ticket prices increased substantially, generally keeping up with or exceeding the rate of inflation. According to the data from the sample group provided by TCG, top ticket prices more than doubled in ten years, increasing from a high of $18.00 in 1982 to a high of $42.00 in 1992. Commercial theater ticket prices also rose sharply from a high of $30.00 in 1982 to $50.00 in 1992, and continue to rise amid some controversy.

As ticket prices rise, non-profit theaters are increasingly pressured to accommodate price-sensitive audiences. Most theaters offer discount programs for seniors, students, and persons with physical disabilities. Several non-profit theaters designate one or more performances of each production as "pay what you can" nights. A number of cities also assist theaters in increasing earned income by brokering tickets through a half-price ticket both, in some cases under the auspices of a local arts agency. The most notable is the TKTS booth in New York City's Time Square, which provides a limited number of half-price tickets to certain Broadway and off-Broadway productions.

V. Artistic Focus

Since the benchmark 1982 SPPA, the artistic focus of the theater field has changed dramatically, and the art form itself continues to evolve. The proliferation of culturally- and ethnically-specific work is most remarkable among these changes, as well as the evolution of performance art from the perspectives of both the artists and the public. As well, there has been a resurgence of traditional theatrical art forms, such as storytelling and monologue. As the nature of theater changes, so do audiences. We are left to wonder which is changing faster — the audience or the art form?

Culturally-Specific Work

Since the early 1980s, many politicians, funders, artists, managers and board members have grown increasingly sensitive to multicultural issues, encouraging theaters to re-define their constituencies and respond to the cultural diversification in the communities they serve. A range of new, culturally- and ethnically-specific work came into prominence, both in regional theaters throughout the country as well as on Broadway. While culturally- and ethnically-specific work has always been produced by theater companies serving particular communities (e.g., Jomandi Productions in Atlanta, El Teatro Campesino in the Bay Area, Pan Asian Repertory in New York, and Penumbra Theater in Minneapolis), it was not until large "mainstream" companies like Yale Repertory Theater began producing works like August Wilson's *Ma Rainey* (1984) that culturally-specific work began attracting large, non-traditional audiences. Since that time, a body of new work has emerged dealing with gay and lesbian issues, feminist themes, as well as culturally-specific work. Among the most successful of these works is Tony Kushner's *Angels in America*, which toured extensively following its Broadway run, to wide acclaim.

Evolution of Performance Art

The growing supply and popularity of performance art and solo performance has undoubtedly had a positive impact on theater participation, particularly among young audiences. It was such work in the early 1980s by monologists Spalding Gray and Eric Bogosian that helped introduce this art form to a wider audience.

Solo performance began reaching a much broader audience when performances moved out of alternative spaces to more traditional venues. People no longer had to be part of a downtown club scene to be aware of such work; traditional theater-goers were increasingly exposed to performance art (while some performance artists increasingly exposed themselves). As awareness grew, so did the audience. The controversy associated with this art form in the recent past clearly raised public awareness, although the audience remains small.

VI. Marketing Programs

Over the past ten years, commercial and non-profit theater producers have implemented customer-centered, research-based marketing strategies in targeting audiences for non-musical stage plays. Through the informed selection of target markets, experimentation with ticket packaging alternatives, telemarketing efforts and production-sharing, the theater field has improved its marketing effectiveness. While other types of performing arts producers and presenters (e.g., opera, classical music, dance) have made similar strides in the area of marketing, the theater field seen the largest overall increase in participation.

With advanced degrees in arts, public, and business administration, managers entering the theater field bring a higher level of technical proficiency to their jobs. Over the past decade, marketing professionals have adopted more disciplined approaches to promotion, particularly in the areas of direct marketing, packaging, and customer segmentation. Now, theaters routinely establish strategic marketing plans targeting specific audiences. Many offer flexible ticket packages to attract and retain series buyers, as traditional subscription offers become less attractive.

Against the backdrop of declining leisure time and increased leisure choices both inside and outside the home, theaters are spending more time and money on marketing efforts for virtually the same return they had in the early 1980s. Audience research is one area of growing import. Research results provide theaters with an enhanced understanding of their audience's attitudes, preferences, satisfaction levels, and buying habits. For example, one theater company learned that their audiences look for three primary attributes in considering whether or not to attend:

- a certain level of quality
- relevancy; some personal connection to the theme or subject matter of the play (particularly the case for culturally- and ethnically-specific audiences)
- entertainment value, which is defined differently for each person (some look for humor, while others seek education)

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Under pressure to increase ticket sales, target marketing efforts became more sophisticated during the 1980's, including both direct mail and telemarketing. Non-profit professional theaters now routinely use telemarketing to support subscription renewal and acquisition campaigns. Direct mail efforts, as well, have become more sophisticated, with more theatres using so-called "micro-targeting" or "precision-marketing" techniques based on geo-demographic market segmentation schemes which permit targeting at the ZIP+4 level of geography (10-15 households).

In the early 1980s theaters generally offered one or possibly two different subscription packages, often using only one letter or brochure. Over the intervening years, creative approaches have become for more sophisticated. Hartford Stage, for example, offered four different subscription packages in 1994, using nine different introductory letters depending on the target segment. The packages ranged from a traditional full-season subscription to smaller series packages appealing to specific price points.

One packaging option that has been widely-adopted by theaters is the flex pass, which allows the selection of a number of plays in the season without committing to specific performance dates. People's Light & Theater Company of Malvern, Pennsylvania, offers six-, eight- and ten-pass packages. Patrons can buy two types of coupons, one redeemable for performances Tuesday through Thursday and another for performances any day of the week. Coupons may be redeemed in any combination — all at one performance or throughout the season.

"Sampler" packages — series tickets to programs offered by several different arts organizations — are increasingly used by theaters to attract new audiences and to respond to the "cultural grazing" phenomenon among the more fickle audience segments. Such a package might combine theater tickets with ballet, opera, and a six-month membership to a museum. Research at the local level points to declining audience loyalty and an increased desire among less-frequent arts attenders to interact with a single source of information about arts programs.

Searching for low cost alternatives to paid advertising and expensive brochures, many non-profit theaters have turned to grass-roots marketing. For example, to increase "word-of-mouth" promotion for its shows, the Guthrie Theater in Minneapolis established a promotion inviting hairdressers to preview performances.

VII. Future Participation in Theater

Will public participation in non-musical theater continue to grow? Will the notion of "traditional" theater audiences become obsolete? Ten years from now, the field will have endured another decade of change. New theaters will open and others will fold; playwrights, directors, and actors will speak out in new ways; the funding climate will inevitably change; and new communications technology will create possibilities for both theaters and audiences.

How will the theater make itself relevant to an increasingly diverse public? Continued development of culturally- and ethnically-specific work, as well as an increased focus on arts-in-education are long-term responses that bode well for the field. One of the most potent findings from ten years of arts participation research is that socialization into the arts as a child is critical to future participation as an adult. Thus, a successful long-term audience development strategy for the theater field necessarily includes expanded performance opportunities for children and their families through outreach, school performances, and other programs.

From a marketing perspective, the greatest challenges to managers relate to inducing first-time attendance, creating marketing and programmatic "points of entry," and targeting promotional efforts to a variety of audience segments with different interest levels and lifestyles. Adoption of improved marketing techniques — some requiring extensive technical knowledge — suggests a skills development challenge for individual managers and the field in general (including those who market touring commercial productions), as well as a commitment to learning about theater audiences through research.

Will the trend towards more performances of fewer productions continue? Much depends on the resources made available to theaters, playwrights, and performers to develop new work. Most likely, the rising costs of producing and touring professional theater — coupled with changes in the funding mix for non-profit theaters — will create even more pressure on earned income. However, it is the developmental component of theater — free of commercial expectations — that ultimately creates renewal. Audiences will continue to change and grow if new works (and old works infused with new relevancy) bring the lives of more Americans closer to the theater. Responsibility for creating new plays rests not just on the non-profit theater, but also on commercial producers, the funding community, and ultimately the audience itself.

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Appendix A: Other Arts Participation Studies

In addition to the SPPA, two other national surveys of arts participation were conducted in 1992. The National Endowment for the Arts, in cooperation with sponsors in 12 communities throughout the United States, commissioned twelve Local Area Arts Participation Surveys (LAAPS), designed to add context to the national survey. An unrelated survey directed by Louis Harris, Americans and the Arts VI, was a nationwide survey of public opinion on the arts commissioned by the American Council for the Arts and sponsored by the Philip Morris Companies Inc. The rates of theater participation vary considerably across the three studies.

12 Local Area Arts Participation Surveys

The LAAPS project examined arts participation in twelve diverse communities, ranging from Sedona, Arizona to Chicago, Illinois. Designed to complement the 1992 national SPPA, the 12 Local Studies included "core questions" identical to those of the 1992 SPPA as well as questions pertaining to barriers to participation, types of facilities attended, and sources of information about arts programs. Additionally, local sponsors in each area were permitted to include a few site-specific questions.

With respect to theater participation, results from the 12 Local Studies varied widely, ranging from a low of 12% for rural Nevada to a high of 29% for Seattle/King County, WA. For the twelve sites combined, the average theater participation rate was 20% — significantly higher than the 1992 SPPA rate of 13.5%. Several situational factors may account for the higher rates observed in the 12 Local Studies. First, the communities that participated in the study were recruited by the Arts Endowment. This may have encouraged communities with active arts programs to participate. Also, of the twelve communities that participated, ten were located within Metropolitan Statistic Areas (MSA) — urban areas which traditionally have higher rates of arts participation.

Similar demographic characteristics of stage play attenders were observed in both the 12 Local Studies and the SPPA; predominantly white, slightly more females, highly educated with above average income levels. The differences include proportionately fewer single adults and significantly higher participation rates for "Other" races in the 12 Local Studies.

Americans in the Arts VI

The 1992 Americans and the Arts VI study was a nationwide telephone survey of 1500 adults, age 18 and over. Its focus was somewhat different than that of either the SPPA or the LAAPS studies; Americans and the Arts VI was largely an attitudinally-based questionnaire with a participation component. The study reported a theater participation rate of 59%, down from 62% in a similar 1987 study. Demographic, Americans and the Arts VI respondents were similar to the other studies in that attenders are generally well educated, have high household incomes, and live in eastern urban areas. Louis Harris respondents are slightly older, the majority being between the ages of 50 and 64. Annual frequency of attendance (2.2 times annually) has decreased since the 1987 Louis Harris study (2.4 times annually).

TABLE 12: Three National Surveys Compared	Participation Rate	Frequency of Attendance	Total Audience (millions)
1992 SPPA	13.5%	2.4 times	60.2
1992 LAAPS	20%	2.8 times	104
Americans in the Arts VI	59%	2.2 times	241.2

TABLE 12: Three national surveys compared

The variance in the results of the three participation studies is largely explained by their differences in methodology. Of the three, the SPPA is the only participation survey from which we can determine national levels for non-musical stage play participation. Theater participation rates from the 12 Local Studies illustrate local conditions, but cannot be extrapolated to the nation at large.

The definition of theater attendance in the Americans and the Arts VI includes participation at non-musical stage plays, musical theater, pantomime, and other kinds of theater. Americans and the Arts VI also does not provide a time frame for attendance, asking only "Do you ever go to any live performance of plays, musical theater, pantomime, or other kinds of theater, or not?" The NEA studies specify a 12 month look-back period.

In comparing these data the reader needs to consider the differences in methodologies. Each study serves a very distinct purpose. Americans and the Arts VI was designed with advocacy in mind. Results were used by the American Council for the Arts to publicize the importance of the arts. The 12 Local Studies helped to uncover some of the relationships between the supply of

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arts programming and participation patterns (including theater attendance) in certain communities. Only the SPPA studies provide statistically reliable estimates of nationwide participation in non-musical theater.

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Appendix B: 1992 SPPA Questionnaire

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About the Author

AMS Planning & Research Corp. is a management consulting practice involved in the planning and development of arts projects and programs of all types. With offices in Connecticut, Michigan, and California, the firm provides services in the areas of cultural facility development, organizational design and development, strategic planning, program evaluation, and market research.

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Other Reports on the 1992 SPPA

The following publications report on various aspects of the 1992 Survey of Public Participation in the Arts. Information regarding availability may be obtained by writing to the National Endowment for the Arts, Research Division, 1100 Pennsylvania Avenue, NW, Washington, DC, 20506.

Age Factors in Arts Participation, Richard A. Peterson and Darren E. Sherkat

American Participation in Dance, Jack Lemon/Jack Faucett Associates

American Participation in Opera and Musical Theater — 1992, Joni Maya Cherbo and Monnie Peters

Arts Participation and Race/Ethnicity, Jeffrey Love and Bramble C. Klipple

Americans' Personal Participation in the Arts, Monnie Peters and Joni Maya Cherbo

Arts Participation by the Baby Boomers, Judith Huggins Balfe and Rolf Meyersohn

Cross-Over Patterns in Arts Participation, Richard J. Orend and Carol Keegan

Effects of Education and Arts Education on Americans' Participation in the Arts, Louis Bergonzi and Julia Smith

Hold the Funeral March: The State of Classical Music Appreciation in the U.S., Nicholas Zill

Jazz in America: Who's Listening?, Scott DeVeaux

Patterns of Multiple Arts Participation, Jeffrey Love

Reading in the 1990s: Turning a Page or Closing the Books?, Nicholas Zill

Socialization in the Arts – 1992, Richard J. Orend and Carol Keegan

Tuning in and Turning On: Public Participation in the Arts via Media in the United States, Charles M. Gray

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