Understanding Audiences

Theatre Arts Marketing Alliance

Audience Survey Executive Summary

February, 2005

In the spring of 2004, twenty theatre companies banded together to conduct a survey to better understand their audiences. The companies are members of the Theatre Arts Marketing Alliance (TAMA), an informal association of midsize, small, and fringe theatre companies in the Greater Boston area that focuses on marketing strategies through collaboration and a sharing of ideas and resources. Working with Janet Bailey, an arts marketing consultant, and with staff from StageSource and ArtsBoston, the group designed a survey that would yield information about their audiences – who they are, how they make their theatre-going decisions, and how the companies might best communicate with them.

Unprecedented Collaboration Among Companies

The TAMA survey represents an unprecedented collaboration among theatre companies in the Boston area. The organizations involved range from well-established, $1-million-plus companies to emerging organizations with budgets under $50,000 a year.

The 20 companies combined have a total annual budget of approximately $6.8 million and serve about 250,000 audience members annually.

The participating companies are: **Actors Shakespeare Project, Boston Playwrights' Theatre, Boston Theatre Works, Company One, Devanaughn Theatre, Gloucester Stage Company, Jewish Theatre of New England, Lyric Stage Company of Boston, Mill 6 Theatre Collaborative, New Repertory Theatre, Nora Theatre Company, Publick Theatre, SpeakEasy Stage Company, Stoneham Theatre, Súgán Theatre Company, The Theater Offensive, Theatre Cooperative, TheatreZone, Wheelock Family Theatre,** and **Zeitgeist Stage**.

The group secured funding from The Boston Foundation and FleetBoston Financial (now Bank of America). They received additional support from two of the area's leading arts service organizations, StageSource and ArtsBoston, and received in-kind support from the Boston Center for the Arts.

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The group worked together to design a questionnaire, which was then distributed at performances during the summer and fall of 2004. Eventually some 4,500 questionnaires were returned out of approximately 15,000 distributed, representing an excellent response rate of about 30%.

High Levels of Satisfaction

Audience satisfaction with these companies' offerings is very high: 70% of respondents report being "very satisfied" and 29% "satisfied most of the time" with their experiences at the participating theatres. Several recurring themes running through the comments point to reasons for the high level of satisfaction:

- **Quality:** Respondents consistently cite the quality of productions – particularly the acting – as the best thing about the theatre experience. The audience clearly recognizes and appreciates that high quality does not necessarily require lavish production budgets.

- **Intimacy:** Audience members very much enjoy the intimacy of these theatre companies' smaller venues – a few hundred seats at most – and repeatedly mention the excitement of being "close to the action" as a positive factor in their experience.

- **Value**: Respondents appreciate the affordable ticket prices offered by these theatres, as 95% rate "ticket price/value for money" as good or excellent.

- **Content:** Audiences cite content of the work itself as the most important factor in their decision of what theatre to attend – more important than "name" actors, reviews in the press, or low ticket prices – and express interest in having more information about the work in advance or printed in their program books. Many specifically mention an appreciation of work that is challenging and thought-provoking.

Audience Profile

Audiences are distributed through all age brackets, with the greatest concentration in the 45-64 age groups. The smaller of the companies tend to attract a younger audience, however, with about a third under age 35, a third between 35 and 54, and a third over 55. The audience tends to be affluent, with a median household income in the $75-$80,000 range. Nearly 40% of respondents were attending their first performance at the particular theatre company at which they filled out their survey. Only 17.6% of the respondents have children under 18 in the home, suggesting that families may be a significant untapped market for these companies.

Entertainment Buying Behavior

Survey respondents cite movies, museums, and other small to midsize theatre companies as their top arts and entertainment choices. Less than 15% of the survey sample reports frequently attending concerts, Broadway-type theatre, professional sports, or dance performances. Results vary quite a bit by age, however: those who are over 55, for example, are four times more likely to attend classical music concerts and opera, while under-35 respondents are twice as likely to attend other types of music events such as pop or jazz concerts.

The timing of ticket purchasing varies dramatically by age. People in the 55 and over age categories are five times more likely to report purchasing tickets well in advance or subscribing to an entire season, while those who are under 35 are three times more likely to purchase on the spur of the moment.

In one particularly noteworthy finding, nearly 90% of respondents report that they usually or sometimes patronize restaurants or other businesses in the area when they go to the theatre, further illustrating the importance of these organizations to the local economy.

Sources of Information

Audience members get their information about plays from a variety of sources, with the most common being word of mouth – friends, colleagues, or knowing someone in the cast or who works at the theatre. For repeat ticket buyers, direct contact from the theatre company via subscription brochures or other mailings is an important source as well.

More than two-thirds of respondents report that they regularly read the *Boston Globe*, often in combination with another paper such as the *New York Times*, *Boston Phoenix*, or a suburban weekly paper such as the *Tab*. This is another area where responses vary by age, however. Less than half of the under-35 group report reading the *Boston Globe* regularly, but they are two to three times more likely than the over-55s to read free publications such as the *Boston Phoenix*, *Metro*, and *Improper Bostonian*.

Sixty percent of respondents report listening to public radio, more than twice as many as listen to any other single radio format.

Usage of the Internet as a source of information is high: more than 70% of respondents say they visit websites to find specific theatre information, and over 60% sometimes purchase tickets over the Internet. The under-35 group is the most web-friendly, with 85% reporting that they get their information from websites, but at least half of the over-55 group is using the Internet as well.

Collaborative Marketing Initiatives Planned

The participating theatre companies have established four priority areas for possible collaborative audience development initiatives:

- **Capitalizing on word of mouth:** Recommendations from friends and colleagues are an important source of information, particularly for first-time attendees, and the companies hope to identify new ways to encourage word of mouth.

- **Embracing the last-minute buyer:** With two-thirds of the under-35 group buying tickets within a few days of the show, TAMA will be looking into new ways to capture these last-minute buyers.

- **Working with public radio:** Given the popularity of public radio with the TAMA audience, the group hopes to develop an approach to gaining better exposure for theatre companies on these stations.

- **Increasing diversity of audiences:** Several of the individual theatres have had success at diversifying their audiences, and the group hopes to create a mechanism for other companies to learn and benefit from their colleagues' experiences.

Other possible collaborative efforts that may be pursued in the future include establishing partnerships with museums or movie theatres, and identifying strategies to attract families to the theatre. In addition, the individual theatre companies will use their results to identify actions they can take on their own, such as partnering with local restaurants or hotel concierges in their neighborhoods.

TAMA has established an online presence at www.tamaboston.org. Visitors to the site can download copies of the survey report and supporting data, as well as link to information about all 20 participating companies. More information on TAMA can be obtained by contacting Nicholas Peterson at nicholaspeterson@newrep.org.