

## Chapter IV

### THE AUDIENCE: The Music Consumers

*Introduction.* Orchestral music would be pointless without the listener. This important factor in music making, the audience, is viewed by economists (William J. Baumol and William G. Bowen), professional market researchers (Eric Marder Assoc., Inc.), performers-conductors (Harry Ellis Dickson and Zubin Mehta), critics (Howard Taubman and Stephan Bornstein), a music educator (Thomas H. Hill) and an orchestra manager (Helen M. Thompson).

#### THE AUDIENCE\*

William J. Baumol  
and William G. Bowen

The relevance of an analysis of audience characteristics to a study of the economics of the performing arts may not be immediately apparent. After all, one might argue that, from a purely pecuniary point of view, the only pertinent factor is box office receipts, and not the identity of the individual who buys the tickets. If the box office does a sufficiently brisk business, a performing company's finances will be in satisfactory condition, no matter who purchases its tickets. Why, then, do we care about the makeup of the audience?

In fact, there are many reasons for our concern. First and perhaps most important, though not from an economic point of view, we care who attends because we believe participation in an audience contributes to the welfare of the individual. If the arts are a "good thing," we must concern ourselves with those who are deprived of the experience.

Second, we must know the characteristics of the audience if

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we are to evaluate ticket pricing and distribution policies. The complaints one hears about high ticket prices discouraging certain groups of people from attending can be evaluated ultimately only in terms of audience composition.

A third reason for concern with the nature of the audience is associated with the issue of government support. Both the desirability and the political feasibility of government support may depend, at least in part, on the composition of the audience.

Fourth, even if we consider the performing arts dispassionately as a product and nothing more, effective marketing policy requires that we know something about those who demand the commodity, just as an automobile manufacturer needs to know who buys his cars. This information helps the manufacturer to merchandise his product and to plan his physical facilities: by giving him a better idea of his future market potential, it enables him to reach more rational decisions on investment policy and on the size and direction of his future activities.

Audience data are necessary, too, for a variety of analytical purposes which arise out of the questions with which we shall deal in later chapters. We have already mentioned one such fundamental question, the effect of ticket prices on audience composition. Equally significant is the relationship between the make-up of the audience and the extent of the contributions which the performing organization can hope to receive. However, the present chapter is primarily descriptive; it is essentially a report on who attends performances today, not an examination of the influences which determine attendance or a discussion of the possible effects of policy changes on the nature of the audience.

#### Survey Methods

Most of this discussion is based on our own data--on figures compiled from direct questioning of a sizable sample of audiences throughout the country--because, by and large, detailed statistics on the audience for the performing arts throughout the country are unavailable. There do exist a number of earlier studies treating particular sectors of the arts, especially the theater. We shall refer to some of these later, but their structure and specialized character restrict the extent to which they can be related to our findings.

Some explanation of the nature of our survey and the procedures used in conducting it is necessary. Our general procedure involved the use of questionnaires which were distributed to a predetermined sample of the audience (usually 50 per cent) at performances of various kinds, by inserting copies into the programs. Recipients were requested to complete the forms and return them to us before they left the hall. The respondent was asked about his age, education, occupation, income, distance traveled to the performance, the amount he spent on tickets, transportation,

restaurant and other expenses associated with his attendance, his frequency of attendance at other types of live performance, his inclination to contribute, and so on. Critical to the success of our survey was the truly extraordinary cooperation we received from the organizations involved. A request for permission to conduct a survey was rarely refused, and once it was granted we were usually offered all possible assistance.

*The surveys were conducted from September of 1963 through March of 1965. In order to determine who should be surveyed, we first compiled a roster of professional organizations for each of the art forms, and then developed a sample which, though not random in a technical sense, gave us wide coverage in terms of art form, region and night of the week. In all, we surveyed 153 performances (88 theatrical, 30 orchestral, 8 operatic, 9 dance, 5 chamber music and 13 free open-air performances) and obtained 29,413 usable replies. The distribution of usable responses by art form corresponded closely to the distribution of estimated audience sizes. Only the Broadway audience was relatively under-represented by our survey, and this was deliberate, for we already had a great deal of information about the New York City audience from other sources.*

As a direct consequence of the geographic distribution of the nation's professional performing organizations, most of our surveys took place in cities of substantial size. The list includes Los Angeles, San Francisco, Portland (Oregon), Seattle, Oklahoma City, Dallas, Houston, Chicago, Ann Arbor, Minneapolis, Cleveland, Cincinnati, Pittsburgh, Atlanta, Abingdon (Virginia), Washington, Baltimore, Philadelphia, Brooklyn and Boston.

On the average, our response rate--the proportion of persons who returned the questionnaires they had been given--was almost exactly 50 per cent. This rate is high for a survey requesting information about income and other personal matters. Broadway and opera audiences produced the lowest rate of response--about 25 per cent in each case. While the low rate of return on Broadway is fairly easily accounted for by the special nature of its audience, which will be described later, our results for opera are less easily explained. The response rate is important not just because it affects the number of usable questionnaires, but also because it may have significant implications for the degree of bias in our results. For example, if bachelors were more willing than married men to provide the information requested, the tabulated results of the survey would report a proportion of married people in the audience much smaller than the true figure.

In order to determine whether, in fact, our results were seriously biased, we undertook several tests. In general, the results are reassuring. There were no marked differences in rates of return from various classes of seats; that is, holders of expensive tickets did not reply at a significantly different rate from holders of less expensive tickets. There was a very slight relationship between response rate and median income, with a small increase in

rate of response associated with increases in the median income of audiences; and there was also a slight relationship between response rate and proportion of males in professional occupations--the higher the number of professionals, the higher the number of returns. However, most of these relations were very weak and, in technical terms, did not satisfy the requirements of "statistical significance." From a more general point of view, what is most comforting is the great consistency of our results. The fact that they show the same pattern at performances differing widely in type and geographic location suggests very strongly that they are not the consequence of accidental biases imparted by the nature of particular audiences.

#### Characteristics of the Audience: Age

Before presenting the results of our survey we shall comment briefly on one important audience characteristic which, for a variety of reasons, we did not investigate directly--ethnic composition. Several persons experienced in the management of performing organizations emphasized that this is a crucial characteristic. As one commented, musical performances are often in trouble in a city without a large German, Italian or Jewish population. A Jewish holiday can decimate the audience even in a Midwestern city. Several managers noted that Negroes, on the other hand, attend infrequently, even where there is no overt discrimination, except perhaps when Negro themes and performers are presented. Of course, these are only casual observations, and we have no way of substantiating them--let alone any way of separating out the effect on attendance of ethnic characteristics per se from the effect of income.

What does our survey tell us about differences between the typical audience and the population as a whole? A succinct summary of our principal findings is given in Table 1, where we present a composite profile of the audiences at the various art forms, each weighted by estimated attendance in 1963-64, and a corresponding profile for the urban population of the United States as of 1960.

The first thing these data suggest is that the performing arts audience, contrary to what many people believe, seems to be somewhat more heavily male than the population as a whole. Nearly 53 per cent of our respondents were male, whereas only a little more than 48 per cent of the urban population is male. However, this probably should not be taken too seriously. It may simply reflect a male prerogative: if a husband and wife were present and the questionnaire was contained in the wife's program, it is very possible that the husband would have filled it out.

Though the median age for the U.S. population is 8 years below that of the arts audience, this indicates simply that children do not often attend the theater although they are included in the Census. The rest of the data on age indicate that the audience is

(cont. on p. 246)

Table 1. Profile of the U.S. Performing Arts Audience, Compared with the Total Urban Population

	Performing Arts Audience <sup>a</sup>	Urban Population <sup>b</sup> (1960)
<b>Sex</b>		
Male	52.8%	48.4%
<b>Age</b>		
Under 20	6.9%	37.1%
Over 60	9.0	13.1
Median Age	38 yrs.	30.3 yrs.
<b>Occupational Category</b>		
<b>Males:</b>		
Employed Persons: <sup>c</sup>		
Professional	63.0%	12.7%
Teachers	10.3	1.1
Managerial	21.4	12.6
Clerical and Sales	13.0	17.2
Blue Collar	2.6	57.5
Students <sup>d</sup>	13.9	
<b>Females:</b>		
Employed Persons: <sup>c</sup>		
Professional	63.2%	14.0%
Teachers	25.4	5.6
Managerial	7.2	3.9
Clerical	24.9	34.3
Sales	2.8	8.5
Blue Collar	1.9	39.3
Students <sup>d</sup>	15.1	
Housewives <sup>d</sup>	35.2	
<b>Education</b>		
<b>Males (age 25 and over):</b>		
Grade School and Less Than		
4 Yrs. High School	2.2%	56.6%
4 Yrs. High School	6.5	22.1
1-3 Yrs. College	12.8	9.8
4 Yrs. College	23.1	6.2
Graduate School	55.4	5.3
Median Category	Grad. work	2 yrs. h. s.
<b>Females (age 25 and over):</b>		
Grade School and Less Than		
4 Yrs. High School	2.8%	55.1%
4 Yrs. High School	15.3	28.9
1-3 Yrs. College	23.6	9.5

	Performing Arts Audience <sup>a</sup>	Urban Population <sup>b</sup> (1960)
<b>4 Yrs. College</b>	26.7	4.5
<b>Graduate School</b>	31.6	2.0
<b>Median Category</b>	4 yrs. college	3 yrs. h. s.
<b>Income</b>		
Over \$5000	91.3%	64.8%
Over \$15,000	39.5	5.4
Over \$25,000	17.4	1.5
<b>Median Income</b>	\$12,804	\$6166
<b>Frequency of Attendance</b>		
<b>Average Number of Performances Attended in Last 12 Months:</b>	<b>Number</b>	
Theater	8.4	
Symphony	5.1	
Opera	1.7	
Dance	1.2	
Other Serious Music	2.2	

a Based on Twentieth Century Fund audience survey; 24,425 respondents. The figures given here are weighted averages of the results for individual art forms. The weights are based on estimated attendance in 1963-64 and are as follows (on a 100 point scale): Broadway = 38, off-Broadway = 5, regional repertory theater = 9, major orchestras = 38, opera = 6, dance = 4.

b Data from U.S. Census of Population, 1960: Detailed Characteristics, U.S. Summary, Tables 158, 173, 185, 194, 203, 224. A composite profile could have been built for just those cities where we conducted surveys, but some experimentation indicated that this refinement would have made little difference.

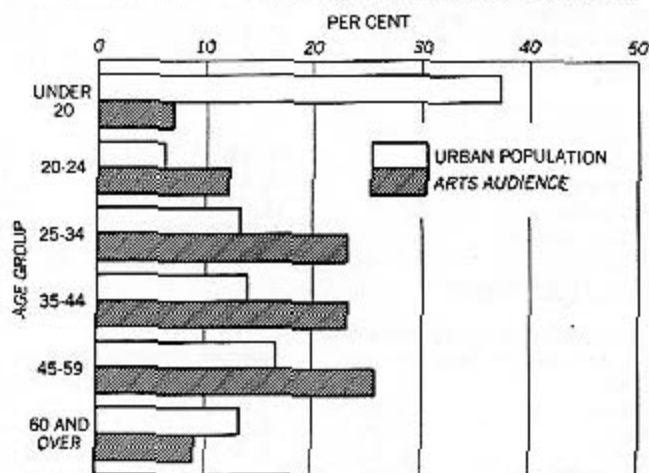
c The number of employed persons is the base for the following percentages. The percentage of teachers is a component of the "Professional" category.

d The base for these percentages is the total number of respondents.



FIGURE 1

AGE DISTRIBUTION OF THE U. S. PERFORMING ARTS AUDIENCE AND OF THE TOTAL URBAN POPULATION



relatively young. This is shown most easily with the aid of Figure 1. In that graph, the dark bars represent the proportion of the audience in different age groups and the light bars the proportion of the urban population as a whole in these age groups. We see that relative to total population the arts audience is greatest in the interval 20 to 24 years of age. Twice as high a percentage of the arts audience (12.2 per cent) lies in that age interval as is the case for the total urban population (6.1 per cent). This ratio of 2.00 is what we call the relative frequency; it is equal to the proportion of the audience within a given category divided by the proportion of the total urban population in that same category. Calculation of such figures for each of our other age group categories shows very clearly that relative frequency declines steadily with age once we get beyond the interval under 20 years of age. These figures tell us that the audience at a typical performance is far younger than the urban population as a whole, and that the older the age group, the smaller is its relative representation in a typical audience. Consequently, older people (those over 60) are the scarcest members of the audience in relation to their numbers in the urban population of the United States. In a word, audiences are young. With the proportion of the nation's population in the younger age brackets growing rather rapidly, this fact may be quite significant.

Two alternative hypotheses can explain the relative youthfulness of the arts audience. If the same age patterns have always characterized the audience, it means that people attend

performances when they are young and then gradually drop out of the audience as they grow older. They may become less interested, or attendance may become more difficult for them, or other interests and responsibilities may keep them from the theater. The second hypothesis is more sanguine. It may be that the performing arts are now attracting a younger audience than ever before. If young people did not attend very frequently in the past, this would account for the smaller number of older patrons today, the absentees never having developed an interest in live performance. If this is so and younger Americans are attending in far higher relative numbers than they did in the past, then we may be building a base for a great future expansion.

Unfortunately, because there is so little in the way of comparable survey results for earlier years, we cannot be sure which of these alternatives applies. The only source of historical data known to us is a series of Playbill surveys of the Broadway theater audience going back to 1955-56. These data show almost no change in the age composition of the audience and thus support the view that the audience is not growing younger.

#### Occupation, Education and Income

Turning next to the distribution of audiences by occupation, we see that roughly 15 per cent of all our respondents were students, and that among employed males only 2 to 3 per cent of the total audience included in the survey was composed of blue collar workers, as compared to a figure of nearly 60 per cent for the urban population as a whole. We conclude that the audience for the arts is made up preponderantly--indeed, almost entirely--of people from the white collar occupations. In the typical arts audience all of the white collar groups are over-represented (in comparison with the urban population), with two exceptions, clerical and sales persons. The degree of over-representation is by no means the same, however. Among males there are roughly nine times as many teachers in the audience as in the urban population of the United States, and nearly five times as many professionals of all sorts (see Figure 2). The arts' share of professionals is also much greater than their share of managerial personnel. In general, the very high proportion of members of the professions in the arts audience is characteristic of both sexes. However, the proportion of teachers in the audience is much higher for men than for women. As a possible explanation one might surmise that a high rate of theatergoing is characteristic of teachers at more advanced professional levels, and that female teachers are more heavily distributed in the lower grades of the schools.

Two numbers not shown on the table or the chart are of interest. Three per cent of our employed male respondents were themselves performing artists or performers and 5 per cent of the females were in this category. These proportions are surely significantly higher than those for the population as a whole, but the unavailability of related Census data prevents a direct comparison.

FIGURE 2

OCCUPATIONAL DISTRIBUTION OF THE U. S. PERFORMING ARTS AUDIENCE AND OF THE TOTAL URBAN POPULATION

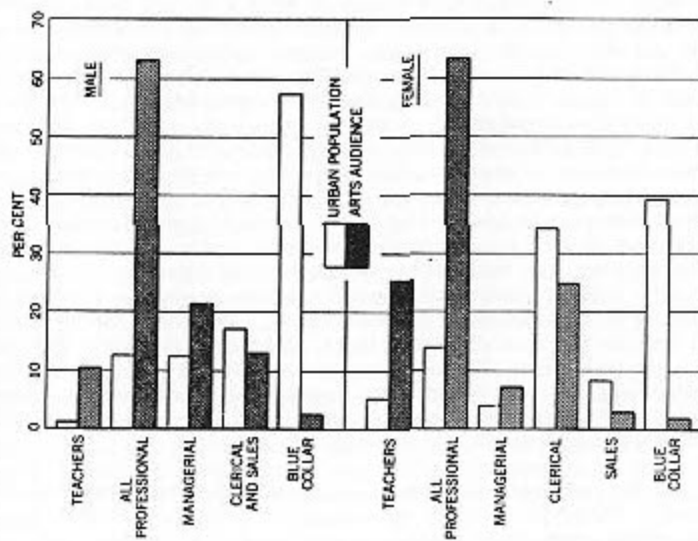
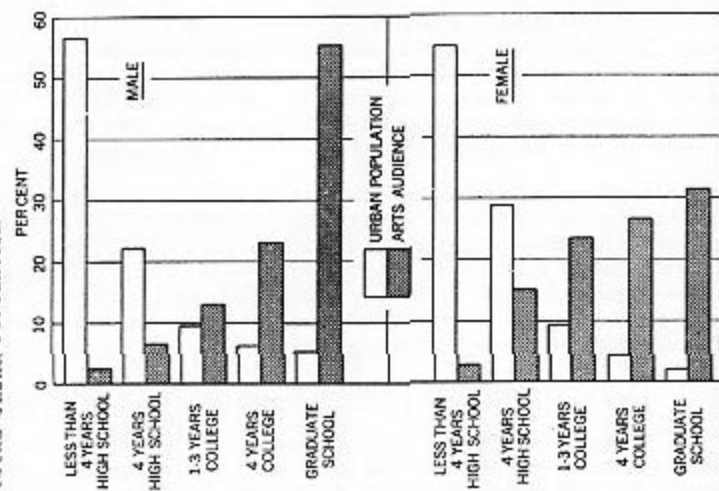


FIGURE 3

EDUCATIONAL ATTAINMENT OF THE U. S. PERFORMING ARTS AUDIENCE AND OF THE TOTAL URBAN POPULATION



Next we turn to the educational attainment level of the audiences, reported in Table 1 and shown graphically in Figure 3. All of these results refer only to persons 25 years of age and over, in order to avoid the biases introduced by including persons who are still in school. We conclude that the audience is composed of exceedingly well-educated persons. Less than 3 per cent of the males and females did not graduate from high school, as compared to the more than 50 per cent of the U. S. urban population 25 years and over who did not do so. At the other end of the spectrum, over 55 per cent of the males attending performances did some work beyond college--an educational level attained by only 5 per cent of the urban population. Almost one third of the women in the audience did some graduate work, as compared with 2 per cent of the female urban population who did so. In Figure 3 the sharp decline in the length of the light bars as we move from top to bottom means that the proportion of the urban population at each educational level falls very rapidly as the level of educational attainment increases; the reverse is true of the arts audience.<sup>1</sup>

The last socio-economic characteristic reported in Table 1, audience income, is described in more detail in Figure 4. Once more the results are clear-cut and extreme. They show that the median family income among a typical arts audience is roughly twice as high as that for the total urban population. Forty per cent of our arts audience had incomes of \$15,000 or more, and 17 per cent had incomes of \$25,000 or more. The proportion of the arts audience in the category \$15,000 to \$24,999 is nearly six times as high as that of the urban population as a whole; and about 11 and a half times as large a proportion of the audience earned over \$25,000 as is true of the urban population generally.<sup>2</sup>

#### Differences in Profiles Among Art Forms

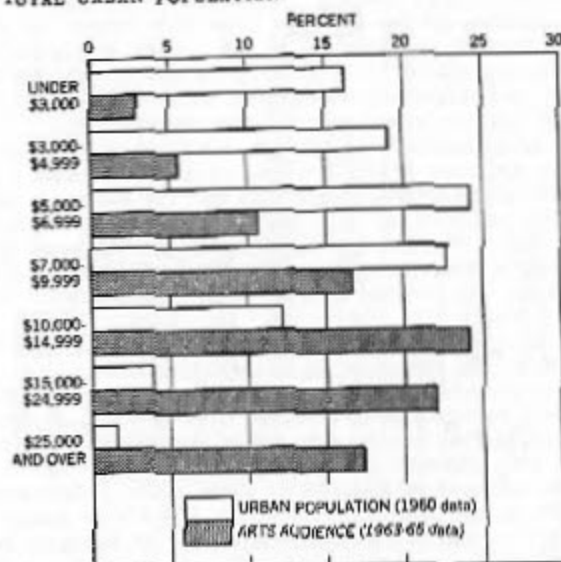
What variations in audience characteristics can be observed when the several art forms are examined separately?

The most remarkable finding is that audiences from art form to art form are very similar. They all show a median age in the middle 30's; over 60 per cent of the audience for each art form consists of people in the professions (and this finding holds for both sexes); all exhibit an extremely high level of education, with 50 per cent of the males having gone to graduate school and 50 per cent of the females having at least completed college; and there is a consistently high level of income, in no case involving a median under \$11,000.

Some moderate differences by type of performance are worth pointing out. For instance, there are differences in attendance by sex among art forms. Women tend to predominate in the audiences of symphonies and the dance, whereas men constitute the majority attending the theater, opera and programs of chamber music. There is also a slight difference in age among the various audiences, with symphonies having a higher percentage of persons over

FIGURE 4

INCOME DISTRIBUTION OF THE U. S.  
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60. However, we must point out that symphonies, perhaps more than other art forms, frequently have special young people's concerts, none of which were surveyed by us. The existence of these concerts must surely bias our estimate of the age distribution of symphony audiences, because many of the young people who attend such special concerts might otherwise have been found in audiences attending other performances.

As to occupations, we find that a relatively small number of students attend ballet, opera and the theater, but that chamber music audiences are heavily peopled by students, teachers and professionals in general. While the number of blue collar workers is low for all art forms, the highest proportion is found at the opera. This finding could reflect the effect of the culture of Europe, where opera is a popular art form, and may, therefore, report what is primarily an immigrant group. On the other hand, because of the small number of operatic organizations surveyed, it may simply represent the influence of the New York City Opera with its low admission prices.

The number of blue collar workers remained consistently low throughout the survey. Their share of the total male audience

reached 6 per cent in only 5 of our 35 theaters, never reached 5 per cent in any of the 12 major orchestras surveyed, constituted 5 per cent of the audience at the Brooklyn Opera, and 7 to 9 per cent of the audience for non-contemporary opera at the New York City Center. In dance, the proportion of blue collar workers was 7 per cent of the total at a performance of the Alvin Ailey Dance Theatre (a Negro company with a considerable Negro following), while in three of the other audiences surveyed there were no blue collar workers. In chamber music audiences the number of blue collar workers never reached 2 per cent.

Educational level was the most consistent element of all, with chamber music drawing the most highly educated audience--over 75 per cent of the males and 52 per cent of the females having attended graduate school.

Incomes also were consistently high, though theater patrons had an income about \$1500 higher, on the average, than members of the audiences of other art forms. In only 2 of the 35 theaters surveyed did median audience income fall below \$10,000. The highest median income was not found on Broadway, but at a West Coast theater, where it was over \$18,000. A Broadway theater did, however, come in a close second. In 29 of our 35 theater audiences, median income was between \$11,000 and \$15,000. The top figure for any single performance was almost certainly higher, because these figures represent the average of all the surveys taken at each organization (there was more than one in almost every case). All 12 major orchestras surveyed showed median audience incomes above \$10,000, the highest being \$15,000. Again, the results varied little; 8 of the 12 exhibited median incomes between \$11,000 and \$13,000. Audience incomes at dance and chamber orchestra performances were slightly lower than those of audiences in general. Two of our five dance surveys reported median incomes under \$10,000. Three of the five chamber group audiences were in this category, but one of the string quartet audiences had a median income over \$16,500.

A distinct pattern emerges from the responses to questions about frequency of attendance. Theater is shown to be the most popular art form. With one exception, the patrons at all types of performance--members of dance, opera or chamber music audiences--indicated that the theater was the art form which they attended most frequently. Even in the exceptional case, the symphony, theater came in a very close second in frequency of attendance; that is to say, members of the symphony audience indicated that they attended theaters almost as frequently as they went to orchestral concerts.

#### The New York Audience

We also investigated the audience in New York City by itself. This enabled us to deal with a constant basic population, one drawn primarily from a single region. It also permitted us to make a



direct comparison between off-Broadway and Broadway audiences, casting some light on differences between audiences for more and for less experimental theater groups.

In general, the off-Broadway audience resembles more closely that of the other art forms than it does the audience of the Broadway theater. On Broadway the age distribution is concentrated in the middle range--comparatively few persons under 20 and over 60 attend. Similarly, the Broadway theater audience includes fewer members of the professions than does any of the other art forms in New York, both among males and females. But even there, professionals constitute more than 50 per cent of the audience. Broadway seems to draw a larger proportion of its audience from among the managerial group than do the other art forms. More housewives are represented in the Broadway surveys and, incidentally, in the orchestral audiences, than at other art forms. The educational level is slightly lower on Broadway, though even there it is remarkably high, with nearly 50 per cent of the men having done some post-graduate work. While income levels are highest in the orchestral audiences, they are not very much higher than median incomes of attendees on and off Broadway, and the off-Broadway incomes are surprisingly close to the incomes of the Broadway audience. In terms of socio-economic characteristics there is no evidence to support the notion that off-Broadway attracts a clientele significantly different from that of any other art form.

The only reasonably comparable series of historical data on audiences which we have been able to find applies to the New York theater. The *Playbill* survey of the audience for the commercial theater on Broadway has been conducted for more than a decade, though at some point there was a change in procedure so that the data are not strictly comparable.<sup>3</sup> What is most noteworthy in the figures for the six years that are usable is how little change in audience composition has occurred during the decade. One can only say that today's audience is about the same as that of a decade earlier except that it earns more money now than it did then. Even this is a misleading observation, for incomes per capita in the United States have also been rising. Indeed, the figures suggest that in this respect, too, the theater audience has remained about the same in relation to the rest of the population.<sup>4</sup> Thus, if there was a "cultural boom"--a movement toward "mass culture"--there is little sign of it in the composition of the audience of the commercial theater.

#### Audiences Outside New York

Since our investigation of the audience outside New York City showed the same patterns reported for the New York audience, a few brief comments on the subject will suffice. Three differences stand out. We found a relatively high proportion of students in the theater audience outside New York, a group which was comparatively poorly represented on Broadway. About 21 per cent of the theater audience was composed of students, as compared with

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figures of 8 per cent for Broadway and 11 per cent for off-Broadway. The same general pattern was evident in the orchestral and operatic audiences. Members of the professions made up a slightly larger proportion of the audiences outside New York City, and, if anything, the educational level was higher in other parts of the country. Income, however, was slightly higher in New York, though the median outside New York City was over \$11,000. Frequency of attendance was somewhat greater inside the city, but not nearly as much greater as one might have expected, given the availability of performance in New York. Indeed, attendance at chamber music concerts was, if anything, somewhat higher outside the city.

The main point, then, is that the general features of our over-all audience profile are by no means due solely to the characteristics of New York audiences--as a matter of fact many of its most noteworthy elements are even more apparent outside New York City.

#### The British Audience

Because our results for the United States suggest that the audience of the performing arts comes from such a very limited segment of our population, it is important to ask whether this reflects a peculiarity of the American culture--whether in other countries, with other traditions and other educational systems, the audience represents a broader spectrum of the general public. For this reason (though we did not know our American results at the time) we decided that a few audience surveys should be undertaken in Great Britain, along with other kinds of research to be described later.

When we discussed our plans with British colleagues, they offered two general predictions: first, that our response rate would be lower in Great Britain than in the United States because the Englishman is particularly sensitive to any invasion of privacy; second, that the British audience would indeed be drawn from a wider group because British education places greater emphasis on the humanities and less on the sciences than does education in the United States. Both conjectures proved to be wrong.

We received a total of 2295 usable responses at seven surveys conducted in the spring of 1965, two at the National Theatre (formerly the Old Vic), one at the Ballet Rambert, one at a performance of the New Philharmonia Orchestra, one at the London Philharmonic Orchestra, one at the London Symphony Orchestra, and one at an operatic performance at Sadler's Wells, all of them in London. Our over-all response rate was 50.3 per cent, almost exactly the same as the rate for the United States.

The similarity of the British and American results is remarkable. Table 2 provides data for Great Britain analogous to the figures given in Table 1 for the United States. The precise