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THE WEST END THEATRE AUDIENCE, 1981 TO 1986

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City University, Department of Arts Policy and
Management

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At the Society of West End Theatre, special thanks to Penny Owens, Marketing Officer, and to Vincent Burke, former Development Officer, for their tireless support of the research programme and for its promotion within the West End. Thanks also to the many West End producers, theatre managers and theatre staff who hosted the surveys, and especially to John Causebrook who hosted more than his fair share of surveys and who always showed a great enthusiasm for the work.

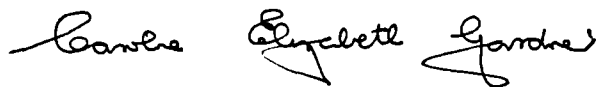
Thanks to the many City University students, past and present, who assisted on the surveys, and especially to Julia Hawkins, Stewart Brown, and Karen Bennett, all of whom worked on the surveys from the earliest days, and whose enthusiasm kept them working on the research long after they had left the University.

Finally, thanks to Dr. Paul Hewett of Cambridge University, for statistical help and advice, and for his support and encouragement throughout.

DECLARATION

I declare that this thesis is my own unaided work, except in so far as I have received the appropriate advice and supervision.

I hereby grant powers of discretion to the City University Librarian to allow the thesis to be reproduced in part and in single copies for study purposes without further reference to me.

A handwritten signature in cursive script, reading "Caroline Elizabeth Gardiner". The signature is written in dark ink on a white background.

Caroline Elizabeth Gardiner.

January 1988.

ABSTRACT

This study gives an account of audience research undertaken between 1981 and 1986 at a sample of London theatres, and covering a wide range of productions, with the aim of establishing a profile of the West End theatre audience. Prior to this research, audience surveys in the U.K. had take place primarily outside London, or had been limited to one or two theatres.

The study details the development of a research methodology for use in a large scale audience research project covering a variety of venues. The process by which techniques for audience sampling, questionnaire design and layout, survey method, and analysis of results were decided on is documented. The process by which an aggregated analysis of the West End audience as a whole was prepared from the sampled research findings is also described.

Analysis of the survey findings begins with an examination of the effects of three variables on audience profiles; time of year, day of the week and type of production. An account is then given of the West End theatre audience overall. Demographic profiles, theatre-going behaviour, press and publicity use, and attractions and deterrents of London theatres are documented and analysed for the audience overall. Variations in the fore-going aspects of audience profiles and behaviour are also documented and analysed for each of the major demographic groups. As a preliminary to a proposed future study on the economic impact of the West End theatres on the local economy, an account is given of audience spending and of its value to local businesses.

The results of the study indicate that theatre-going behaviour may be largely determined by social factors, and that the research therefore has a predictive value. The implications of this finding for marketing the theatre and for cultural policy-making are examined in the conclusions.

ABBREVIATIONS USED, AND PRELIMINARY NOTES

(1) The term SWET throughout this study refers to the Society of West End Theatre, a trade association representing producers, theatre managements, and theatre owners for the majority of London's large theatres. A full list of member theatres is given in Appendix 3. Although the membership does not include "fringe" theatres, and although many theatres are outside the Western postal districts of central London, the terms "West End theatres" and "London theatres" are used interchangeably throughout this study to refer to all those theatres which are members of SWET.

(2) Percentages are rounded throughout to the nearest whole number, and columns of percentages may therefore add to slightly more or less than 100%

(3) All means are given to the nearest whole number.

(4) The symbol * is used to denote a figure of less than 0.5%, which is therefore not rounded up to 1%, but which is greater than zero.

(5) The abbreviation "unav." is used in tables to denote occasions when the relevant figures were not available.

(6) Some tables summarise the answers to several questions, and the base figures given at the head of a table may not always represent the number of replies given to all the questions so summarised. Fuller details are given in the notes to Chapter 2.

(7) Some of the research findings detailed in this study have previously been published, primarily in the report The West End Theatre Audience, 1985/86, published by SWET in October 1986. There may be occasional very small variations in percentage figures between previously published extracts from the research, and the figures given in this study. This is because the earlier figures were in part calculated using weighting figures for which some West End theatres' attendances had to be estimated, since results were not available at that time. The figures in the present study are based on a fully up-dated weighting, using figures from all West End theatres, and therefore should be regarded as the authoritative source where any variations are found.

CHAPTER 1 INTRODUCTION. BACKGROUND TO THE RESEARCH, AND RESEARCH METHODOLOGY

(1) Background

In the 1960s, theatre audience surveys in the U.K. tended to concentrate on individual theatres, primarily those outside London. Most projects were focused on examining the audience for one or two productions, and details of survey method and of findings were seldom widely circulated or published. When some details were available, usually through survey reports being lodged in the library of the Arts Council of Great Britain, the reports tended to be fragmentary, with incomplete details of survey method. Two examples from 1967 are; surveys at the Newcastle Theatre, for which the notes on methodology indicate only that a 1 in 6 sample of the audience was surveyed at 2 performances, and that 344 questionnaires were issued of which 91% were returned⁽¹⁾; and a survey or surveys at the Everyman Theatre, Cheltenham, for which the only details of methodology given are that 6,000 questionnaires were issued and 1,920 returned. (2)

The first published account of a U.K. theatre audience survey was given by Peter Mann of Sheffield University, writing in the British Journal of Sociology in 1966.⁽³⁾ Mann outlined in detail a method of audience research adapted from basic market research techniques, with audiences being given a self-completion questionnaire which was printed as part of a free theatre programme. This

questionnaire was used for surveys of 41 performances of 2 productions at the Sheffield Playhouse in 1965. 92% of the audience completed questionnaires, and 11,008 questionnaires were analysed. This paper gave no account of the findings of the survey, although results were later published separately.⁽⁴⁾

In the later part of the 1960's and the early 1970's, detailed and comprehensive audience research reports began to appear, which gave full descriptions of survey method and findings, and such research covered a wider range of different productions than previously, although still in the majority of cases restricted to one venue. Many were undertaken either with the assistance of academics from local higher education institutions or were commissioned from a market research company. Two examples are; Peter Mann's study of 14 performances of a range of touring productions of drama, ballet and opera at the Grand Theatre in Leeds, ⁽⁵⁾ and a study by Trevor Jones Marketing and Research of 15 performances at a range of productions at the New Theatre, Cardiff.⁽⁶⁾

The first known U.K. theatre audience survey to cover both a range of venues and productions over a period of time was conducted by Mass Observation for the Arts Council between 1974 and 1977.⁽⁷⁾ 32 performances of Arts Council tours of dance, drama and opera were surveyed at theatres in 11 major towns in England, and around 28,000 questionnaires were analysed. Within London, however, most theatre

audience research conducted in the 1960's and early 1970's was on a much smaller scale than either of the Mann studies or the Mass Observation research, and concentrated in the main on a few performances at an individual venue. Two examples are; 3 performances surveyed at the Royal Court in 1974 with 321 replies⁽⁸⁾; 5 performances surveyed at the Royal Opera House in 1974 with 3,075 replies.⁽⁹⁾ Almost all the known surveys in London at this period were in theatres within the subsidised sector, and no accounts of methodology or findings from surveys of commercial sector theatres in the West End of London were available.

Between 1972 and 1977, a small-scale piece of audience research was conducted at four theatres belonging to what was then the Wyndham's Theatre Group in the West End of London. Although not strictly qualifying as an audience survey, since it was conducted by interviewing all purchasers of tickets at the box-offices of these theatres on the first Monday of every month, rather than focusing on the audience for a specific performance or performances, an area of residence profile for the West End audience was estimated from this research. It was claimed that 34% of the West End audience in 1972 were from overseas, rising to 45% in 1976. Despite the major flaws in this survey method, which would exclude all postal and telephone bookers, all those who booked their tickets on days other than Mondays, and all those attending categories of productions not generally performed at any of the four selected theatres - such as large scale musicals, opera and

dance - the dearth of reliable information on the West End theatre audience at that time, and the high level of interest in that audience resulted in the findings being given considerable prominence in the national press, with Bernard Levin in the Sunday Times predicting the end of the West End theatre because of its over-reliance, as he saw it, on overseas business.⁽¹⁰⁾

Thus, by the late 1970's, theatre audience research in the U.K. was still restricted in the main to small projects based at a single venue, while those few projects which covered different venues were primarily conducted outside London, so that there was no reliable information on who constituted the West End theatre audience, but a great deal of interest in establishing an audience profile. .

It was in this context that the London Theatre Audience Survey Group was formed in 1978, drawing its members from a number of London theatre managements, from City University and from the Society of West End Theatre, with the aims of checking the validity of the Wyndham's theatres' research findings, and of embarking on a comprehensive project of audience research to examine the demographic and theatre-going profiles of the West End theatre audience. A Research Working Party was formed from the LTAS group, drawing additional members from bodies whose interests were related to the West End theatre industry, such as the British Tourist Authority and the Office of Arts and Libraries.⁽¹¹⁾ The Research Working Party initiated a

number of research projects to examine the West End theatre audience, including a study of attitudes to London theatre-going among the general public, commissioned from National Opinion Polls⁽¹²⁾; the collection of box-office data on attendances, cash taken, and capacities for both, from each of the SWET member theatres⁽¹³⁾, which City University was commissioned to collate and analyse; and three audience surveys at the Prince of Wales Theatre in 1979, carried out by Michael Quine of City University. Quine's work established that West End audiences could be surveyed using a self-completion questionnaire technique, and following its success, the Research Working Party agreed to sponsor a research post at City University, to carry out an industry-wide survey of the West End theatre audience, to begin in 1981. It is this project that the present study deals with.

(2) Selection of surveys

The major problem to be addressed before beginning the survey programme was how to obtain a manageable sample of the West End audience. The population to be sampled consisted of all ticket holders at each of the approximately 16,000 performances given annually in those London theatres (the great majority, with only "fringe" venues in the main excluded) which were members of SWET. The available funding was estimated to allow for approximately 35 surveys.

It was decided that rather than attempting to survey the total West End audience on a randomly sampled basis, more useful information could be obtained and the survey resources more effectively deployed by examining the effects of specific variables on audience profiles, and subsequently establishing the profile of the West End audience as a whole by an aggregated analysis of the survey results.

Three variables were selected as being most likely to have a significant effect on audience profile. These were time of year, day of the week, and category of production.

To test for the first, the effect of seasonal variations, two productions were selected which had, at the start of the proposed survey period, already had a sufficiently long

run to become established features of the West End theatre scene, and which it was anticipated would run for at least another calendar year. Three sample dates, approximately four months apart, were selected for each production. Each time a production was to be surveyed to test for seasonal variations, the same day of the week was selected for the survey. By choosing the same production and the same day of the week for each of the two sets of surveys testing for seasonal variation, the effects of variables other than seasonal ones on audience profile would be minimised, and any major variations detected during the course of the year were most likely to be due to seasonal factors. The unexpected announcement that the second production selected would close shortly after the proposed second seasonal testing survey of that production meant that a further production had to be selected for seasonal testing. This was surveyed shortly after the second survey of the production originally selected, and again on the original third survey date allocated for the cancelled production. This meant that for seasonal testing, one production was surveyed three times, and two productions twice each.

A similar approach was taken to testing for day of the week variations. Two shows were selected and dates for surveys assigned on four days in the same week, in each case. Each set of four surveys covered a slightly different selection of days in order to sample as many different days as possible, without significantly reducing the comparability of each set of findings. One further show was selected to

be examined specifically for variations between a matinee and an evening audience during the same week.

Drawing up a sampling frame to test for the effects of category of production on audience profile was more difficult than for the other two variables. In selecting production categories, the assumption had to be made at this early stage that the audience for productions allocated to the same category would be broadly similar, even though the surveys were partly intended to test this assumption. The Research Working Party decided that ten categories would encompass all West End productions; these were - opera, including operetta; dance, including both classical and modern dance; modern drama, written after World War Two and primarily serious in theme; classical play, broadly the type of pre-World War Two text likely to be included in educational syllabuses, and in effect likely to be restricted in the West End largely to plays by Shakespeare and his contemporaries; modern musical, distinguished from other musicals in containing "pop" music, primarily represented in the West End by the work of Andrew Lloyd Webber; traditional musical, broadly those musicals which were written in the style of Rogers and Hammerstein or Lerner and Loewe; comedies, excluding those containing songs; thrillers; revue or variety shows, including one man shows; children's shows, including those aimed as much at family audiences as at young children accompanied by parents. The difficulty of classifying all the West End repertoire into a small number of mutually

exclusive categories will be clear even from this brief description. This was especially so for musicals, and the Research Working Party felt the need to make a distinction between a musical such as Lloyd Webber's Cats and one such as Rogers and Hammerstein's Oklahoma.

When selecting dates for testing for category of production variations, day of the week and seasonal variations could have been eliminated by conducting surveys of each of these categories of production at the same time, but this would have required several teams of researchers, an impossibility with the available resources. An alternative approach would have been to survey each category of production on the same day of the week for ten consecutive weeks, but that was a long enough time span to introduce some element of seasonal variation and it was not known at this stage how much of an effect seasonal variations might have. It was decided to compromise by sampling on three early to mid-week dates - Tuesday, Wednesday and Thursday - on the assumption that there were less likely to be significant variations between these days than between early and late days of the week, and less variation than would be introduced by seasonal factors if sampling over several weeks. A sampling frame for testing for variations due to category of production that allowed for survey dates on Tuesday, Wednesday or Thursday over three or four consecutive weeks was accordingly constructed. This exercise was to be repeated during the year, and the productions selected were to be duplicated where possible

in each set of surveys as a means of checking how far seasonal factors might effect the analysis of category of production variables.

This section of the survey programme was at first sight less likely to provide highly accurate findings than those testing for day of the week or time of year variations, since the number of surveys that had to be conducted made it impossible to eliminate fully the effects of seasonal or day of the week variations. There were further complications. Productions representing all the categories were not always available for survey at the required times; children's shows for example, are very seasonal, and so surveys of these were eventually arranged for the Christmas/New Year holiday period and not as part of the category of production variations testing, which therefore included nine surveys in each series. It did not always prove possible to obtain permission from the producer to survey the initial production selected; no producer of a thriller was willing to give permission for a survey of his production for the first series of category of production testing surveys, although a thriller was found for the second series. An extra modern drama survey was substituted for the thriller in the first series of category of production testing, so that in fact only eight categories of production were examined in the first series of category of production testing surveys. To compensate, an additional thriller survey was carried out after the completion of the main survey programme. The sampling of

audiences for category of production variations was therefore a compromise between the need for the elimination of other variables, and the availability of research time and of suitable productions for which permission to carry out a survey could be obtained. The findings of the research did indicate, however, a strong core audience corresponding to each of the categories selected, with seasonal and day of the week variations having less marked effects on audience profiles than category of production variables.

Taking these three samples of variables together, a sampling frame was then drawn up to spread the survey programme throughout a period of approximately one calendar year. With duplication of testing where possible, so that a show being tested for variation by category of production could, where appropriate, also be used for testing for seasonal variation, and with each series of surveys being repeated, 35 survey dates were selected for an initial programme, to include 3 pilot surveys of methodology and of the questionnaire in November and December 1981.

On two occasions, a producer specifically requested an additional survey of one of his productions other than that selected, because the findings of the initial survey had proved particularly valuable in his marketing of the productions surveyed. These two surveys were incorporated into the original survey programme and the findings were

taken into account when making an aggregated analysis of the West End audience. One further survey, of a thriller, was carried out in February 1983, as no thriller had been available for the first set of surveys testing for category of production variations, but findings from this survey were utilised only in the comparative assessment of the audience for thrillers with that for other categories of production since it took place outwith the proposed calendar year's duration of the initial survey programme. A total of 38 audience surveys were therefore carried out in the first audience survey programme between November 1981 and February 1983, and the results of the first 37 of these were utilised in the aggregated analysis of the West End theatre audience.

The productions surveyed were as follows (all surveys took place in 1982 unless otherwise indicated). Pilot surveys were conducted in November 1981 at performances of the comedy No Sex Please, We're British,⁽¹⁴⁾ and in December 1981 at Arthur Miller's modern drama, All my Sons, and at the traditional musical, The Mitford Girls. The seasonal testing surveys were carried out at performances of Underneath the Arches, a revue, in March, August and November, Educating Rita, a comedy, in March and July; and Andrew Lloyd Webber's modern musical, Cats, in July and November. The day of the week testing was carried out at performances of Pass the Butler, a comedy, on Monday and Wednesday evenings and at Friday matinee and Saturday evening performances in May, of Summit Conference, a modern

drama, at Monday, Wednesday, Friday and Saturday matinee performances in October; and of 84 Charing Cross Road, a modern drama, at Tuesday matinee and Wednesday evening performances in November and December. Productions surveyed for category of production testing were: children's shows over the Christmas/New Year holiday period - The Sooty Show and Treasure Island; testing of eight categories in three consecutive weeks on early to mid-week dates in March - classical play, Shakespeare's Richard II; comedy, Willy Russell's Educating Rita; modern musical, Lloyd Webber's Evita; revue, the recreation of Flanagan and Allen sketches, Underneath the Arches; traditional musical, They're Playing Our Song; modern drama, Christopher Hampton's The Portage to San Cristobal of A. H.; dance - Ballet Rambert at Sadlers Wells; opera - Massenet's Manon in the English National Opera production. As no thriller was available for survey in this period, an additional survey was carried out, of a modern drama, Peter Shaffer's Amadeus. Findings for this last survey were, however utilised only in the aggregated results, and not in the comparative category of production analysis. The second set of testing for category of production variables used the following productions for nine surveys in July and August: classical play - Shakespeare's All's Wells that Ends Well; comedy - Educating Rita; modern musical - Lloyd Webber's Cats; revue - Underneath the Arches (the repetition of the surveys of these last three mentioned productions as seasonal tests meant that an analysis could be made of whether seasonal or category of production variables had more of an effect on audience profiles);

traditional musical - The Pirates of Penzance; modern drama - Robert David MacDonald's Summit Conference; dance - the Royal Ballet School at Sadlers Wells; opera - Puccini's Tosca in the English National Opera production; thriller - a dramatisation of Agatha Christie's Cards on the Table. A further thriller survey was added in February 1983, of Agatha Christie's The Mousetrap, to compensate for no thriller being available for survey in March 1982.

The surveys carried out in addition to the main programme at the request of producers were both comedies; Nell Dunn's Steaming, and Michael Frayn's Noises Off, carried out in November and December 1982 respectively. Neither of these additional survey results were utilised in the analysis of the effects of the three main variables on audience profile, but they were incorporated into the aggregated analysis of the West End audience.

Following the completion of the first audience survey programme, two long-running productions were selected for periodic surveys throughout 1983 to monitor any major changes in the audience profile which might be occurring over time. Findings from these surveys were also utilised in a further analysis of the effects of seasonal variables on audience profile. Since The Mousetrap had already been surveyed in February 1983, it was selected as one of the productions for survey during 1983, and a further three survey dates were added for this production in June, November and December. A second production, Lloyd Webber's

Evita, was surveyed in June, October and December. Day of the week was a constant throughout for both sets of surveys.

In 1985/86, the original industry-wide survey programme was repeated, on a smaller scale, to establish whether major changes in audience profile had taken place over that three-year period. 20 audience surveys were carried out between May 1985 and April 1986. The major differences between the first and second survey programmes were as follows. Testing for seasonal variations was carried out in the 1985/86 survey programme on two productions, both comedies; Denise Deegan's Daisy Pulls it Off, and Richard Harris' Stepping Out, each surveyed on three occasions, the former in July, October and December 1985, and the latter in July and November 1985 and January 1986. Only one production was selected for the examination of day of the week variations, the comedy Wife Begins at Forty, on dates in April 1986 covering Monday and Wednesday evening and Saturday matinee and evening performances. No mid-week matinees were included in the 1985/86 survey programme. As no revues or variety shows were playing during the major part of the 1985/86 survey programme, none were included in the category of production testing. Instead, additional musical surveys were carried out. It was thought that during 1984, a third distinct category of musical had emerged in the West End in addition to the traditional and modern musical, that is, the transfer of a recent Broadway hit musical. Two surveys were therefore added to the programme to represent this category, Rogers and Hart's On

Your Toes and Warren and Dubin's 42nd Street. Two surveys were added so that conclusions about this category of production should not be based on one survey only; for all the other categories, comparisons could be made with the 1982 surveys. Both productions had had very successful Broadway runs shortly before their openings in London. The other productions selected for category of production testing in 1985/86 were; classical play - Webster's The Duchess of Malfi at the National Theatre; comedy - Stepping Out (which doubled as a seasonal test); modern musical - Lennon, a musical biography of John Lennon; traditional musical - Me and My Girl; modern drama - Harvey Fierstein's Torch Song Trilogy; dance - the Merce Cunningham Dance Group at Sadlers Wells; opera - Offenbach's Orpheus in the Underworld in the English National Opera production; children's/family show - The Scarlet Pimpernel. The category of production testing surveys were spread out over the year, owing to limitations of resources, rather than being clustered around a few weeks, as in 1982, so that seasonal and day of the week variations could not be as confidently eliminated as in 1982. However, the 1982 survey results had indicated that category of production variations were much stronger than seasonal or day of the week ones, so it is believed that the less concentrated programme of surveys testing for category of production variations in 1985/86 did not materially affect the validity of comparing the two sets of findings. A full list of survey dates and productions surveyed throughout the survey programmes is given in Appendix 4.

(3) Questionnaire design

The most commonly used type of questionnaire for carrying out previous theatre audience surveys had been one which the audience completed themselves, by ticking boxes or circling numbers that corresponded to their answer, or sometimes by writing in their answers. Interview surveys had been used in some previous surveys, the Wyndham's Theatre research being one example, but a self-completion questionnaire was preferred for this research because it allowed for a much greater number of respondents than an interview survey.

A review of questionnaires for previous theatre audience surveys indicated that typical questions asked fell into three broad categories - those which were intended to determine the demographic profile of the audience; those which dealt with theatre-going behaviour, such as ticket buying; and those which dealt with related factors such as what influenced theatre-goers in selecting a production, and their attitudes and opinions about the theatre. It was decided that while the main thrust of this research project was to establish the first of these, the demographic profile, the results from questions on the latter two topics would be of assistance to theatre managements in their administration and marketing, so that the West End questionnaire should include some questions from each of these three categories.

A pilot questionnaire of 26 questions was drawn up and tested in November 1981. It included questions on demographics - home area, age, sex, and education; theatre-going habits - reason in London that day, visits to theatres in and outside London, size of party, how and when tickets were booked and paid for (including credit-cards owned and used), awareness and use of Leicester Square booth,⁽¹⁵⁾ travel to the theatre, eating out on a theatre visit and convenient performance timings; and on related topics - publicity (including publications read and radio listening), *factors influencing choice of production*, and factors deterring respondents from theatre-going. None of these questions proved to present any serious difficulties in either ambiguities of interpretation or in raising issues on which respondents objected to being questioned about, to judge by the response rates for individual questions. No question was left blank by more than 5% of respondents. The only modification that was therefore made to the questionnaire following the first pilot survey was a re-design of the cover. There had been a misapprehension among some members of the audience at the first pilot survey that the questionnaire was an appeal for financial contributions, since the headline read "The Society of West End Theatre would like your help!". This headline was changed to "Help us to help you" for the questionnaire which was used for the second pilot survey. The amount of explanatory text on the front cover was also reduced, as audience members in the pilot survey had tended to ask survey helpers for information about the survey method, rather than reading the text, and a smaller amount of text

was thought to make it less likely that audience members would be deterred from reading the questionnaire initially. Following successful second and third pilot surveys, this revised version of the questionnaire was used for all surveys from December 1981 to December 1983.

A further revised version of the questionnaire was produced for the 1985/86 up-date, which expanded some questions and added others on topics which had become of increased interest to theatre managements since the previous survey programme. Expanded questions were; the question on home area was expanded to include an analysis of U.K. resident respondents by borough or town, rather than by region only, as in the first survey programme; further breakdowns were requested on the largest group sizes and the most frequent theatre-goers; details were requested of the names of ticket agencies used; and those who booked by credit-card were asked to state which one was used. Questions were added on; whether there were problems with after show transport; expenditure on items related to the theatre visit; and overseas visitors were asked whether they had made additional visits to London in the previous 12 months, and how important an attraction of London the West End theatres were. Several questions were considered to be unlikely to offer any interesting new data in 1985/86, and these were cut from the revised version. These were; theatre-going outside London; awareness of the production attended prior to arrival in the U.K. among overseas visitors, and whether their theatre bookings had been made

prior to arrival in the U.K.; use of the standby ticket scheme; credit card ownership and previous use of credit cards to purchase theatre tickets; knowledge of, and previous use of, Leicester Square half-price booth; convenient performance timings; and radio listening. Some of the questions which remained from the original questionnaire were slightly reworded in the 1985/86 version, where minor changes which would reduce the amount of processing required could be introduced without being likely to affect the comparability of the results. For example, the 1981/82 question on publicity had separate categories for "newspaper classified listings" and "magazine classified listings", and this became "classified listings in the press" in the 1985/86 version. The total number of questions was reduced to 21. This second revised version of the questionnaire was used in all surveys in 1985 and 1986.

With all versions of the questionnaire, the closed type of question, with only one possible answer and with all the possible answers listed in full on the questionnaire, was used in preference to any other type. This was the least likely type of question to introduce ambiguities and distortions, because it reduced the need for audiences to interpret the question and word their answer in their own way, and removed the need for the interpretation and classification of the answers during the analysis. Answers obtained from this type of question could be very easily coded for use in computer analysis, since a limited range

of numerical codes could be assigned to each of the possible answers.

Some multiple response questions, of the type that asked the audience to tick all the answers that applied, were included where the results this type of question would produce were considered to provide a more useful form of analysis than a single answer question would. For example, if a question on publicity were worded, "How did you hear about this show? Tick all options that apply", the answers to this question would give a measure of the relative importance of each possible source of information about a production. If the same question were worded so that only one answer was possible, e.g., "How did you first hear about this show? Tick the first way only", the answers would reveal only which sources of publicity brought a production to people's notice in the first place. In the case of this research, an analysis of the relative effectiveness of publicity sources was considered to be more useful, and so publicity was covered by a multiple response question.

Some completely open-ended questions, where the respondent was invited to write in his or her own answer, were also used. The use of open-ended questions, while permitting distortions, since all answers would ultimately have to be classified anyway for statistical processing, was essential where the possible answers were too numerous to be listed on the questionnaire, as, for example, in the question

"Please list all those magazines and periodicals that you read regularly". It was also an appropriate style of question to use when it was important not to prompt the respondent. For example, a question phrased as "Is there anything at all that puts you off going to the theatre in London? Please specify", was likely to produce a more accurate range of answers than asking "Which of the following put you off going to the theatre in London?" and listing options such as high ticket prices and travel problems. Respondents might not think these were serious problems unless prompted. The thrust of this particular question in this research project was to establish the degree to which audiences might spontaneously complain about certain aspects of theatre-going, so that a completely open-ended question was appropriate.

Where it was thought that most of the likely answers, but not all possible ones, could be listed on the questionnaire, given the constraints of space, questions were used which had the majority of probable answers listed but with space for other possible answers to be written in.

It was decided not to print numerical codes corresponding to the answers to each question on the questionnaires themselves, as is sometimes seen in self-completion questionnaires. As good response rates were a priority, it was decided that it was preferable to have the conversion of the answers into numerical codes for analysis carried out as a separate process rather than risk deterring some

people from completing the questionnaire because it might appear that figure work was involved. Boxes were provided to be ticked next to the appropriate answer, or space left for the answer to be written in, and replies written in were subsequently converted into numerical codes.

The questionnaires were professionally designed and printed. The format of each version of the questionnaire was A4 with two folds to form a 21cm by 10cm leaflet, similar to standard theatre publicity leaflets, and printed on high quality gloss paper. The front cover of each questionnaire emphasised the official *nature of the survey* by explaining that it was being conducted under the aegis of SWET, and that results would be used in implementing improvements in theatre-going conditions in the West End. It also gave details of how to complete the questionnaire, where to return it, and how to participate in the prize draw being offered by SWET as a means of increasing response rates.⁽¹⁶⁾ SWET's address was also provided for correspondence, in case any members of the audience wished to make further comments on matters relating to the West End which required replies, and in fact a small number of questionnaires were returned by post to SWET after most of the surveys.

Copies of each of the three versions of the questionnaire used are reproduced in Appendix 5.

(4) Survey method

Survey methods used in previous theatre audience surveys were reviewed, and three major aspects of survey methodology were assessed for their suitability for West End theatres. These were; method of administering the questionnaire; whether to take a sample or a census; and whether the questionnaires should be completed at the performance or at a later date.

Four methods of administering the questionnaire were found in this review of previous surveys; leaving them on seats, slipping them in programmes, conducting a face to face interview, or handing them out.

Leaving questionnaires on seats was considered to be a very impersonal method of conducting a survey, and potentially wasteful of paper, since in most cases, questionnaires would have to be placed in advance on seats which might not be sold. Other probable hazards of placing questionnaires on seats were thought to include questionnaires not being well-balanced on tip-up style seats and falling to the ground unnoticed, or obscuring the seat numbers. It was also considered possible that if questionnaires were placed on only a sample of seats, they might be removed and completed by members of the audience other than those they were intended for.

Slipping questionnaires into programmes was a method of

administering the questionnaire which had been used in several regional theatres. Peter Mann's 1966 Sheffield study had used a variation of this method, with the questionnaire forming the cover of a free programme which was given to all members of the audience.⁽¹⁷⁾ Most West End theatres charge for programmes, although some provide free cast lists. Discussion with West End theatre managers indicated that it was not usual for most members of an audience, or even most groups, to purchase a programme in the West End. Slipping programmes would therefore have resulted in a self-selecting sample, and there might be special reasons why particular sections of the audience did not purchase a programme; for example, shortage of money, or perhaps having seen the production before. This method of distribution would therefore introduce an element of bias in West End surveys, regardless of whether all programmes or only a sample were slipped.

Face to face interviews were ruled out because of the manpower that would be required, and because far fewer people could be surveyed at a given performance than would be the case if the questionnaire was a self-completion one.

It was decided, therefore, that the best method to use would be the handing out of questionnaires. A consistent survey procedure could be relatively easily maintained over a range of theatres by this method, and it would promote personal contact with the audience, which other studies had suggested helped to produce high response rates. Its major

disadvantage was the amount of manpower required to issue questionnaires, but students could be recruited to assist with this.

The question of whether to take a sample or a census of the audience at each performance surveyed was considered. A sample was an attractive option because it would result in fewer questionnaires to process. Several visits to observe audiences at London theatres, however, demonstrated that a sample would be difficult to administer accurately in the often confined corridors of many older theatres, which sometimes became very crowded close to curtain-up. It was therefore decided that an attempted census would be less likely than a sample to result in variations in survey method between theatres of different layout and design.

A decision had to be made on whether to ask audiences to complete and return a questionnaire on the afternoon or evening of the survey, or whether they should be allowed to take the questionnaire away for subsequent completion. The main argument against completion during the theatre visit was that the questionnaire was fairly long and audiences might not feel they had enough time to complete all the questions, and so be deterred from completing any. The main arguments against completion after the performance were that people might lose interest once they were no longer within the range of personal encouragement to complete a questionnaire; that some means of returning the questionnaires would have to be devised at no cost to the

respondent; that it would involve coding all the questionnaires to be distributed beforehand so that the performance at which they were issued could be identified; and that a time limit would have to be imposed beyond which questionnaires returned from a particular survey were not included. The disadvantages of relying on subsequent return of questionnaires were greater therefore, than those of aiming for completion and collection on the day of the survey. The introductory text asked for questionnaires to be returned at the performance, although a few questionnaires from each survey were subsequently returned by post.

The survey method thus determined on therefore involved handing out questionnaires to everyone in the audience, for return that same day. During the first pilot survey, however, it became clear that several factors made the achievement of a census even at the handing out stage problematic. Some people spoke little or no English, and proved to be unable to complete what was a fairly complex questionnaire. Young children also proved to be unable to complete the questionnaire, and a number of spoilt questionnaires and facetious replies were received from children. Latecomers were generally very flustered, and tended to brush the questionnaires aside, or if they paused to accept one, the theatre management were inconvenienced, since they wanted to get latecomers seated as quickly as possible. Following the first pilot survey, it was therefore decided that those who spoke little or no

English, those apparently aged under 16, and latecomers should be deliberately excluded from the issue of the questionnaires, and a note made by the survey helpers of the numbers thus excluded. As a handing out method of distribution was used, and as the survey helpers talked to members of the audience as they entered the auditorium, it was relatively simple, except during the very busiest periods, to keep a record of these deliberate exclusions. A record was also kept of refusals to accept a questionnaire, though these were fairly rare, most people being willing to at least accept a questionnaire when the nature and purpose of the survey was explained to them. Recorded refusals were taken into account when calculating response rates. It should be borne in mind when reading this study that figures given for the percentage of the audience who were from overseas excludes those who spoke little or no English, while the age distribution of the audience excludes all those aged under 16 at the time of the survey.

In practice, the method used for the surveys generally proceeded as follows. The theatre selected was visited about a week before the survey, and during discussion with the theatre manager the number of survey helpers required and where they should be placed was determined. In most theatres, this was a point just beyond the ticket tearers and programme sellers. Locations were selected so that each member of the audience should pass a survey helper on their way into the auditorium, and no-one who was not attending

the performance should pass a survey helper. Teams of survey helpers were recruited from students at City University. Survey teams were briefed in advance on the survey method and theatre layout. They assembled at the theatre an hour before curtain up to allow them time to become familiar with the building, and with the answers to the kind of questions that the audience might ask if they mistook them for theatre staff, such as finishing time of the performance, and location of the toilets. Survey helpers were given dark blue t-shirts to wear, with the word "SURVEY" printed on them in large white letters, so that they could be readily identified in the often large and dim theatre auditoria. Badges had been used in the first pilot survey, but it was clear that they were not large or distinctive enough to be easily spotted. Each survey helper was given a bundle of questionnaires, which were counted before issue, and a supply of pens for those audience members who required them. In most theatres, the audience was admitted to the auditorium forty-five to thirty minutes before the start of the performance. As each member of the audience passed into the auditorium, the survey helper offered them a questionnaire, and explained the nature and purpose of the survey. Most people accepted a questionnaire at this stage, although couples sometimes declined at first to take one for each person. Pointing out to couples that if they both completed the questionnaire they had two chances to win the prize draw was usually sufficient to persuade them at least to accept two copies of the questionnaire. Other reasons for refusal encountered included overseas visitors claiming that they

were only visiting and so did not count as representative audience members, and very occasionally, someone who had completed a questionnaire before. In the former case, survey helpers explained the importance of establishing the overseas percentage of the audience, and in the latter, they explained that the overall survey programme covered a wide range of productions, and that a different audience profile would be compiled for each production, so that theatre-goers were to be included once for every West End theatre visit they made. Most people who initially refused for one of the above reasons accepted a questionnaire once they had received a more detailed explanation of the purpose of the survey. The handing out method of questionnaire distribution meant that some persuasion could be used to try and keep the number of refusals low, which would not have been possible had questionnaires been left on seats. Once the signal was given by theatre management that the performance was about to begin, survey helpers withdrew from the auditorium area, remaining just outside the entrances for fifteen minutes to note the number of latecomers. During the performance interval(s), survey helpers walked around the auditorium, foyer and bar areas, carrying copies of the questionnaire and a supply of pens as conspicuously as possible, so that it was clear they were looking for completed questionnaires. It was quite common for people returning questionnaires to seek out the survey helper they had received their questionnaire from, even when other survey helpers were nearer, supporting the theory that personal contact played an important role in improving response rates. Sometimes it was possible, with

the co-operation of the theatre management, to provide boxes for collection at strategic points, to have the survey announced over the theatre's public address system, and to have posters about the survey displayed in the foyer area. All of these proved to be of assistance in achieving high response rates. The majority of completed questionnaires were collected during the interval, with far fewer before and after the performance. At the end of the performance, survey helpers manned the major exits to collect any remaining completed questionnaires. After the survey, the number of blank questionnaires remaining from each survey helper were counted to establish how many questionnaires had been issued, and a note was made of the numbers of exclusions and refusals, and the reason for each.

(5) Response rate and analysis

Response rates varied from venue to venue, though in the majority of cases, between 45% and 65% of questionnaires issued were returned. Response rates not surprisingly tended to be lowest at performances with short intervals. The lowest response rate achieved was 20% of questionnaires issued and the highest 80%. There was some degree of correlation between the number of survey helpers and the level of response rate, with a ratio of about 1 survey helper to every 100 audience members being the most consistently favourable. (18)

The mean response rate for the first major survey programme in 1981/82 was 58% of questionnaires issued, and for the 1985/86 programme, 57% of questionnaires issued. The 1983 surveys achieved a mean response rate of 60%. The mean response in each stage of the programme was therefore very similar. On average during all three survey programmes, around 4% of the total audience were excluded as being apparently under 16 (although the figure was, predictably, much higher at individual children's shows), 1% as speaking little or no English (although the figure was much higher at certain categories of production, especially musicals), and 2% were excluded because they were latecomers. This meant that about 93% of the total audience surveyed over each of the three survey periods was issued with a questionnaire, and the overall response rate as a percentage of the total West End audience surveyed was around 54% in each survey period. Overall, response rates

were not quite as good as were reportedly achieved in some surveys in regional theatres.⁽¹⁹⁾ One possible reason for this was that there was a sense of loyalty and commitment among audiences to their local theatre, which would not apply for most West End theatres. Support for this theory comes from the survey finding that in those West End theatres with a strong individual identity or a resident company, response rates tended to be high when compared to those for a theatre presenting a changing programme with no particular company or style of production associated with it.

During the 1981/82 survey period, 11,547 completed questionnaires were analysed, including those from the pilot surveys. During the 1983 survey period, 2,381 questionnaires were analysed, and during the 1985/86 survey period, 6,589 questionnaires. All questionnaires were coded for computer processing and the Statistical Package for the Social Sciences software was used in the analysis.⁽²⁰⁾

An analysis was made first of the results of each individual survey, and a report given to the producer and to the theatre management. Secondly, those surveys testing for the effects of the three main variables were analysed as groups. For seasonal and day of the week variations, individual survey results were analysed on a comparative basis. For categories of production, the comparative analysis was based on an aggregate of the two surveys

specifically conducted under each category heading in 1982; in 1985/86, only one survey was analysed for each category of production, with the exception of the Broadway musical category, for which an aggregate of the two productions surveyed was used in the comparative analysis by category of production. The analysis of the effects of the three main variables on individual production audiences forms the basis of Chapter 2.

Following the specific analysis, an analysis was made of the West End audience as a whole. Analysis of the effects of specific variables had indicated that category of production variables were responsible for larger and more consistent variations in audience profile than either seasonal or day of the week variables, so it was decided to use these categories as a basis for producing a weighted aggregated assessment of the West End audience. An aggregated set of results was prepared covering all the surveys which took place in 1981 and 1982, ⁽²¹⁾ and the percentage of total responses which came from each category of production was calculated. The percentage of the total audience surveyed for each category of production that had been accounted for by the under 16's and by those with little or no English, and who had been deliberately excluded, was then calculated. ⁽²²⁾ The box-office research project provided details of West End attendances during the 1981/82 survey period, broken down by category of production. These figures were extracted for the nearest 52 week period to the survey period, ending in a

Sunday.(23) The same percentage figure as represented those among the audiences surveyed who were aged under 16 or who had little or no English, for each category of production, was deducted from actual West End attendances for each category of production, so that the remaining attendances would be likely to represent only those aged 16 or over with a reasonable command of English. These attendances were then added, and the percentage of the total accounted for by each category of production was calculated. Weights were then applied to the aggregated survey results so that these would be adjusted to the correct proportions to represent the actual percentage of West End attendances (excluding those likely to be accounted for by the under 16's and those with a poor command of English) accounted for by each category of production. (24) This process was repeated for the aggregated results of the 1985/86 surveys, although as no revues were surveyed in this period, they were excluded from the calculations. However, since revues accounted for less than 2% of all West End attendances during the 1985/86 survey period, their exclusion made only a minimal difference.

The weighted and aggregated figures obtained by the method outlined above formed the basis of the assessment of the overall West End theatre audience. The validity of the sampling and weighting process was confirmed by the fact that the weighted aggregated figure which was drawn from the survey results for estimated sales made at Leicester

Square half-price ticket booth was virtually identical to the actual booth sales figure in both survey periods. (25) This close correspondence indicated that the low response rates in some surveys had not materially affected the accuracy of the overall findings.

No weighting was carried out for frequency of theatre-going, so that essentially attendances rather than theatre-goers were sampled. Throughout this study, therefore, the analysis will be based primarily on attendances, and not on theatre-goers as individuals. Individual frequent theatre-goers will therefore have proportionately more importance in the results than individual infrequent theatre-goers since they account for a higher number of attendances.

* * * * *

This study concentrates on the analysis of the findings from the major survey programmes in 1981/82 and 1985/86 and on the differences in audience profiles between the two years, though reference will be made where appropriate to the findings of the 1983 surveys, particularly in the indications they provided of the way in which the audience profile was changing over time, and in the analysis of seasonal variations.

Chapter 2 presents the findings of the testing for the effects of specific variables on audience profiles. Chapters 3 to 9 present the weighted aggregated analysis of

the West End audience, of particular categories of theatre-goers, and of estimated attendances for the relevant survey periods which were accounted for by these categories. This study concludes in Chapter 10 by addressing those questions about the nature of the West End audience raised by the survey findings, and analysing their implications for the theatre.

Notes to Chapter 1

- (1) Newcastle Theatre Survey, 1967, unpublished photostat, 2pp. Copies of all unpublished surveys mentioned in this chapter were consulted in the Information Library of the Arts Council of Great Britain. At the time of writing, these survey reports can be consulted by appointment made through the Information Department of the Arts Council.
- (2) Cheltenham Everyman Audience Survey, 1967, unpublished photostat, 1pp.
- (3) Mann, P. H., Surveying a theatre audience, methodological problems, British Journal of Sociology, Vol. XVII, No 4, December 1966
- (4) Mann, P. H., Surveying a theatre audience, findings, British Journal of Sociology, Vol. XVIII, No 1, March 1967
- (5) Mann, P. H., The Provincial Audience for Drama, Ballet and Opera. A survey in Leeds, 1969, Report to the Arts Council of Great Britain.

- (6) Trevor Jones Marketing and Research Ltd., New Theatre, Cardiff, Audience Survey, 1972, report to the Welsh Arts Council.
- (7) Verwey, Peter, Research on audiences for Arts Council Opera, Dance and Drama Tours, 1978, summary of MO findings issued as photostat by ACGB.
- (8) Royal Court Theatre: Report on Results of Audience Survey on Experimental "Almost Free" System, 1974, unpublished photostat, 13pp
- (9) Sadlers Wells Opera at the Royal Opera House, Audience Survey, 1974, unpublished photostat, 12pp. .
- (10) Levin, Bernard, The Sickness at the heart of London's Theatre, January 29, 1978, article in the Sunday Times. The article is reproduced in Appendix 1.
- (11) A list of members of the Research Working Party is given in Appendix 2.
- (12) The results of this research are summarised in London Theatres, unpublished research report by NOP, 1981.

- (13) A list of member theatres is given in Appendix 3. Results of the box-office sales research are summarised annually in Gardiner, Caroline West End theatre attendances, an annual unpublished research report for SWET, from 1981 onwards.
- (14) Fuller details on each of the productions surveyed are given in Appendix 4.
- (15) The booth is based on the New York TKTS booth. It was opened in Leicester Square in 1980. It sells tickets for some SWET member theatres at half-price plus a service charge (50 pence during the 1981/82 survey period, and 75 pence during the 1985/86 survey period), on the day of performance only, for matinees between 12 noon and 2 p.m., and for evening performances between 2.30 p.m. and 6.30 p.m. Tickets are available as allocated by the individual theatre, and each day's available productions are posted outside the booth shortly before opening time. Fewer than half of all West End productions are likely to be available at any given time.

(16) One questionnaire was drawn for a prize from those returned at each survey. The prize from 1981 to 1983 was a pair of tickets for the West End production of the winner's choice. In 1985 and 1986, the prize was a pair of tickets for SWET's annual Laurence Olivier Theatre Awards ceremony. In both cases, alternatives were offered to those who were unlikely to visit London again.

(17) See note (3).

(18) The usual size of survey team was around 8 helpers, though the numbers on each occasion depended on the availability of volunteers and the willingness of theatre management to accommodate teams of a large size. Although larger teams of survey helpers might have improved response rates, it was necessary that the size of the team be kept to a level that theatre management felt would not cause unacceptable disruption. The largest team used was 14 helpers, at the London Coliseum, with a capacity of around 2,500, and the smallest 3 helpers, at the Ambassadors Theatre, with a capacity of around 450.

- (19) For example, Mann's 1965 study at Sheffield Playhouse achieved response rates of 92% of questionnaires issued, and the 1974-1977 Mass Observation research for the Arts Council achieved response rates in the 50%-80% range.
- (20) SPSS Versions 7 to 9 were used, in the University of Kansas Honeywell conversion. See Nie, Norman H, and Hull, C Hadlai, SPSS, 1975, and SPSS update 7-9, 1981, McGraw Hill. Version 10, SPSS-X, is in most widespread use at the time of writing.
- (21) The thriller survey which took place in February 1983 was not included in this aggregated analysis, as it was used in the 1983 audience assessment, but findings from this survey were used in comparing thrillers with other categories of production.
- (22) Although latecomers were also deliberately excluded, it was not thought likely that the percentage of the audience who were latecomers on a particular occasion would be directly linked to the category of production being surveyed, and it would therefore have been inappropriate to include latecomers in any calculations based on category of production.

(23) In 1981/82 the survey period was longer than 52 weeks by about 2 weeks, and in 1985/86, it was shorter by about 2 weeks. In each case, the closest 52 week period's box-office figures were used. Because of periodic minor variations in the number of participating theatres in the box-office research, estimates were included for those theatres known to have been open in both survey periods but making a return in one only, or for part of that period only, based on average attendance levels for other theatres with a production in the same category playing at the same time.

(24) The attendance totals calculated using the method outlined above, once the estimated attendances by the under 16's and those with little English were excluded, were 8.8 million for the 52 weeks closest to the 1981/82 survey period, and 10.6 million for the 52 weeks closest to the 1985/86 survey period.

(25) SWET record sales from the booth, and booth sales figures were supplied by the SWET marketing office.

CHAPTER 2 EFFECTS OF MAIN VARIABLES EXAMINED ON AUDIENCE PROFILE

(1) Seasonal Variations

The following tables present selected findings from each set of surveys which examined the same production at different times of the year. (1)

	<u>1982</u>							
	<u>Production 1</u>			<u>Production 2</u>		<u>Production 3</u>		
						<u>Modern</u>		
	<u>Revue</u>			<u>Comedy</u>		<u>Musical</u>		
	<u>Mar</u>	<u>Aug</u>	<u>Nov</u>	<u>Mar</u>	<u>Jly</u>	<u>Jly</u>	<u>Nov</u>	
Response rate %	23	34	54	52	47	31	30	
Unweighted base ⁽²⁾	196	126	230	248	239	291	295	
	%	%	%	%	%	%	%	
Overseas	10	17	20	27	39	42	39	
Overseas countries represented (actual)	8	8	15	11	15	22	19	
London boroughs	37	38	26	46	29	26	22	
Rest U.K.	53	45	54	27	32	32	39	
On holiday	17	28	37	19	37	35	25	
Work in London today	19	23	17	32	28	15	22	
Mean age (actual) ⁽³⁾	49	40	48	35	36	38	36	
Mean frequency London theatre-going (actual) ⁽⁴⁾	2	2	2	3	2	2	2	

Fig 2-1 Selected seasonal variations in audience profile.

1982

Base = all respondents surveyed for seasonal testing

1983

Production 1 Thriller

	<u>February</u>	<u>June</u>	<u>November</u>	<u>December</u>
Response rate %	55	49	58	67
Unweighted base	218	220	258	334
	%	%	%	%
Overseas	33	53	54	31
Overseas countries				
represented (actual)	16	16	18	9
London boroughs	22	9	9	17
Rest U.K.	45	38	37	52
On holiday	37	62	52	28
Work in London today	19	14	19	3
Mean age (actual)	35	39	40	37
Mean frequency	2	1	1	1
(actual)				

Fig 2-2 Selected seasonal variations in audience
profile, 1983

Base=all respondents surveyed for seasonal testing

Table continued on next page

1983

Production 2 Modern Musical

	<u>June</u>	<u>October</u>	<u>December</u>
Response rate %	46	41	52
Unweighted base	330	417	604
	%	%	%
Overseas	70	29	43
Overseas countries			
represented (actual)	15	10	11
London boroughs	10	10	11
Rest U.K.	20	61	46
On holiday	61	38	51
Work in London today	19	15	7
Mean age (actual)	35	32	31
Mean frequency (actual)	1	2	2

Fig 2-2 Selected seasonal variations in audience
profile, 1983

Base=all respondents surveyed for seasonal testing

	<u>1985/6</u>					
	<u>Production 1</u>			<u>Production 2</u>		
	<u>Comedy</u>			<u>Comedy</u>		
	<u>Jly</u>	<u>Oct</u>	<u>Dec</u>	<u>Jly</u>	<u>Nov</u>	<u>Jan</u>
Response rate %	63	48	63	70	48	62
Unweighted base	333	242	173	268	152	166
	%	%	%	%	%	%
Overseas	69	33	28	56	46	41
Overseas countries represented(actual)	11	11	11	11	8	6
London boroughs	14	24	32	28	30	31
Rest U.K.	17	42	40	16	24	28
On holiday	60	47	30	47	42	35
Work in London	15	19	19	20	23	23
today						
Mean age (actual)	33	33	31	40	41	37
Mean frequency	2	2	2	2	2	2
(actual)						

Fig 2-3 Selected seasonal variations in audience profile,

1985/86

Base=all respondents surveyed for seasonal testing

The results of the first set of seasonal testing surveys in 1982, of a revue production, displayed less marked seasonal variations between surveys than did subsequent productions tested in the same year. For most of the productions surveyed for seasonal testing, the most notable seasonal variation in audience profiles proved to be the distribution of the audience by area of residence. In

general, surveys in the summer months produced higher percentages from overseas than other times of year. The composition of the overseas section of the audience also showed seasonal variations, with the size of the U.S.A. component being particularly liable to seasonal change. In the summer months, U.S.A. residents tended to account for the largest group of overseas visitors, even though this was also the period during which the largest number of different overseas countries tended to be represented in the audience. The percentage of all overseas visitors which was accounted for by U.S.A. residents was at its lowest during the winter months. European visitors, especially those from Scandinavia in late 1985 and early 1986, were particularly important among winter and spring audiences.

The percentage of the audience which was accounted for by residents of the Greater London boroughs was in general low when the percentage from overseas was high, although not invariably so.

Other, less marked, seasonal variations in audience profiles were likely to have been related to changes in area of residence distribution. For example, during the summer months, holiday-makers formed a more important section of most of the audiences surveyed than did those working or living in central London.

Other broad trends included; a generally younger mean age among audiences in the winter months than at other times of year, and a low mean frequency of London theatre-going among summer audiences.

(2) Day of the week variations

The following tables present selected findings from each set of surveys which examined the same production on different days of the week.

1982

Production 1 Comedy, May

			<u>Friday</u>	<u>Saturday</u>
	<u>Monday</u>	<u>Wednesday</u>	<u>1st show</u>	<u>evening</u>
Response rate %	74	67	68	67
Unweighted base	193	177	99	298
	%	%	%	%
Overseas	28	27	22	26
London boroughs	39	46	45	46
Rest U.K.	33	27	33	28
Female	50	46	64	49
Mean age (actual)	33	33	35	30
Mean frequency (actual)	2	3	2	2
Work in London today	25	23	33	4
In London for theatre visit	34	40	26	49
Group of 3-6	41	17	32	37
Use public transport	48	47	55	41
Book Leicester Sq. booth	17	7	9	14
Book on day of perf.	75	57	61	66

Fig 2-4 Selected day of the week variations in audience profile, 1982

Base=all respondents surveyed for day of the week testing

Table continued on next page

1982

Production 2 Modern Drama, October

	<u>Saturday</u>			
	<u>Monday</u>	<u>Wednesday</u>	<u>Friday</u>	<u>matinee</u>
Response rate %	56	50	45	70
Unweighted base	263	208	250	265
	%	%	%	%
Overseas	62	54	45	33
London boroughs	19	22	27	33
Rest U.K.	19	23	28	34
Female	52	54	48	59
Mean age (actual)	40	42	40	42
Mean frequency (actual)	2	2	2	3
Work in London today	24	26	29	8
In London for theatre visit	15	25	22	41
Group of 3-6	20	21	22	22
Use public transport	50	54	46	62
Book Leicester Sq.booth	-	-	-	13
Book on day of perf.	75	60	60	63

Fig 2-4 Selected day of the week variations in audience profile, 1982

Base = all respondents surveyed for day of the week testing

1982

Production 3 Modern Drama

November/December

	<u>Tuesday</u>	<u>Wednesday</u>
	<u>Matinee</u>	<u>Evening</u>
Response rate %	78	75
Unweighted base	158	139
	%	%
Overseas	28	29
London boroughs	26	53
Rest U.K.	46	15
Female	75	59
Mean age (actual)	54	40
Mean frequency (actual)	2	3
Work in London today	12	23
In London for theatre visit	45	34
Group of 3-6	19	21
Use public transport	82	54
Book Leicester Sq. booth	23	11
Book on day of performance	73	38

Fig 2-5 Selected midweek matinee and evening performance
variations in audience profile, 1982

Base = all respondents surveyed for matinee/evening
testing

1986

Comedy, April

	<u>Monday</u>	<u>Wednesday</u>	<u>Saturday</u> <u>matinee</u>	<u>Saturday</u> <u>evening</u>
Response rate %	59	55	65	61
Unweighted base	137	106	224	276
	%	%	%	%
Overseas	55	62	7	32
London boroughs	22	18	25	15
Rest of U.K.	23	20	68	53
Female	41	34	51	44
Mean age (actual)	40	42	44	38
Mean frequency (actual)	2	2	3	2
Work in London today	16	22	4	8
In London for theatre visit	14	21	68	37
Group of 3-6	28	33	45	50
Use public transport	52	68	49	34
Book Leicester Sq.booth	24	16	9	10
Book on day of performance	56	47	22	50

Fig 2-6 Selected day of the week variations in audience
profile, 1986

Base=all respondents surveyed for day of the week
testing

The major day of the week variations in audience profile were as follows:

(a) Evening performances

For evening performances, overseas visitors tended to be clustered towards the early part of the week in their theatre-going, and in 1982, Monday evening performances in particular had a high percentage of overseas theatre-goers in the audience. Several American students studying at City University, who assisted in the surveys, have suggested that one possible reason for this is that package tours to Europe from the U.S.A. typically arrive in London on a Saturday night, when it is too late to go to the theatre that evening, and as the theatres are not open in the West End on Sunday, Monday is the first possible day for theatre-going by visitors on these tours. It is apparently common for such package tours to move on across the Channel to France on the Thursday, so early week London theatre performances would in fact be the only option for U.S.A. visitors on such packages. Another possible reason for overseas visitors' apparent preference for early week performances is that demand for tickets for West End theatres is perhaps perceived as being greatest at weekends in London, so that those in London for a few days only, buying tickets at short notice, may think they have a better choice of tickets if they select an early week performance.⁽⁵⁾ Patterns of ticket-buying by audiences at Monday performances showed a more casual approach to theatre-going than at end of week performances, with higher

levels of on-the-day booking and particularly of use of the Leicester Square half-price ticket booth ⁽⁶⁾, than at mid-to-late week performances. Mean frequency of theatre-going among audiences was very slightly lower at Monday performances than at other times of the week. Monday audiences were broadly characterised as audiences with high percentages of tourists, holidaymakers and casual theatre-goers.

Audiences mid-week, at Wednesday performances, still contained higher percentages of overseas visitors on average than did audiences at weekends. Mid-week audiences tended, however, to be more evenly mixed between the different age groups and between infrequent and frequent theatre-goers than audiences in the earlier part of the week.

Friday evening performances were popular with theatre-goers who worked in London, including those who lived in the home counties. During the course of the 1982 survey programme, one of the day of the week testing surveys carried out was of a production which had two Friday performances, one at 6.00 p.m. and another at 8.30 p.m., and the popularity of Friday performance surveyed, that at 6.00 p.m., with the home counties commuter, when compared with other days of the week for the same production, was particularly notable. An end of week visit to the theatre when the theatre-goer is in London anyway because of work and where an early

performance is offered so that he can get home relatively early was evidently an attraction for the home counties commuter.

Saturday evening performances tended to attract high percentages who had made a trip into London specially to see the performance, particularly among home counties residents. The Saturday evening audiences surveyed had a younger mean age than did audiences for other evening performance of the same production. Small groups of 3-6 travelling into London by car, formed an important section of Saturday evening audience, and public transport tended to be used by theatre-goers on Saturday evenings less than by theatre-goers during the week.

(b) Matinee performances

For matinees during the week, the composition of the audience was clearly dependent on which types of theatre-goer might be free to attend a performance. The mid-week matinee audience surveyed in 1982 proved to be largely dominated by elderly female theatre-goers, many of them on a day trip to London. London boroughs residents accounted for a very small percentage of the mid-week matinee audience compared with the mid-week evening audience of the same production. The mean age of the mid-week matinee audience was much higher than that for the evening performance of the same production, with the over fifties proving to be particularly important among the former

audience.

The Saturday matinee audience surveyed in 1986 was not as markedly different from the Saturday evening audience as the mid-week matinee audience surveyed in 1982 had been from the mid-week evening audience. As on the Saturday evening, those who had made a special trip into London to see the performance formed a very important section of the Saturday matinee audiences surveyed. The matinee audience on the Saturday surveyed in 1982 were more frequent London theatre-goers than were the Saturday evening audience surveyed. Public transport was used by Saturday matinee audiences to travel to the theatre much more than by Saturday evening audiences. Use of the train to travel to the theatre was particularly high among the Saturday matinee audiences surveyed. The 1985/86 surveys included a question on travel problems encountered after a performance at a London theatre, and a higher percentage of the Saturday matinee than of the Saturday evening audience, 15% and 7% respectively, claimed to have problems with transport home after seeing a show in London. One reason for some people selecting a Saturday matinee rather than an evening performance might therefore have been a lack of late night trains to their home area from central London, although the question did not ask whether the problems experienced were with evening transport only.

* * * * *

The fact that the major variations in audience profile

according to day of the week which emerged from the 1982 surveys held true for the 1986 update, suggests that although the importance of different groups as a percentage of the total audience may change from year to year, the patterns of theatre-going among particular groups, in terms of choice of day of the week to visit the theatre, will tend to be consistent.

(3) Category of production variations

This section provides an analysis of demographic variations in audience profile according to category of production, and of certain aspects of theatre-going behaviour that varied with the category of production. Chapter 9, which deals with the factors affecting theatre-goers' choice of production, gives an account of the attractions of different production categories.

Note that only nine of the ten categories of production surveyed were represented in both survey periods, and that productions in the tenth category surveyed in each year - revue in 1982, and Broadway musical in 1985/86 - cannot therefore be directly compared with one another.

(a) Demographic variations

The following tables show selected demographic variations in audience profile by category of production.

Category of production, 1982

		<u>Modern</u>	<u>Classical</u>	<u>Modern</u>
	<u>Opera</u>	<u>Dance</u>	<u>Drama</u>	<u>Play Musical</u>
Mean response				
rate %	56	59	51	53
Unweighted base	1650	1372	405	917
	%	%	%	%
Overseas	11	4	12	17
London boroughs	58	66	64	61
Rest U.K.	31	30	24	22
Female	55	71	66	57
Under 25	15	32	31	27
55 and over	21	11	9	14
Mean age (actual)	41	34	33	36
Students	11	24	21	23
Non students				19
educated to				
19 or over	64	65	74	80
				54

Fig 2-7 Selected demographic variations in audience profile by category of production, 1982

Base=all respondents surveyed for category of production testing

Table continued on next page

Category of production, 1982

	<u>Traditional</u>		<u>Children's/</u>		<u>Revue</u>
	<u>Musical</u>	<u>Comedy</u>	<u>Thriller</u>	<u>Family</u>	
Mean response					
rate %	49	50	69	56	30
Unweighted base	828	487	434	161	322
	%	%	%	%	%
Overseas	37	33	49	5	13
London boroughs	36	37	18	47	37
Rest U.K.	27	30	33	48	50
Female	57	59	61	67	55
Under 25	34	31	28	12	9
55 and over	10	14	13	20	28
Mean age					
(actual)	34	35	36	37	45
Students	21	23	21	11	6
Non-students					
educated to					
19 or over	56	60	57	45	33

Fig 2-7 Selected demographic variations in audience profile by category of production, 1982

Base = all respondents surveyed for category of production testing

NB. The thriller surveys analysed included one survey conducted in February 1983. This applies to all analyses of thrillers under the category of production heading throughout this chapter.

Category of production, 1985/86

	<u>Modern</u>		<u>Classical</u>	<u>Modern</u>	
	<u>Opera</u>	<u>Dance</u>	<u>Drama</u>	<u>Play</u>	<u>Musical</u>
Mean response					
rate %	39	61	50	45	55
Unweighted base	856	690	275	411	209
	%	%	%	%	%
Overseas	9	11	22	15	41
London boroughs	66	64	47	56	43
Rest U.K.	25	25	31	29	16
Female	46	58	56	47	49
Under 25	19	24	31	18	49
55 or over	21	4	6	13	2
Mean age(actual)	42	33	34	38	29
Students	29	30	35	33	,41

Fig 2-8 Selected demographic variations in audience profile by category of production, 1985/86

Base=all respondents surveyed for category of production testing

Table continued on next page.

Category of production, 1985/86

	<u>Traditional</u>		<u>Children's/</u>		<u>Broadway</u>
	<u>Musical</u>	<u>Comedy</u>	<u>Thriller</u>	<u>Family</u>	<u>Musical</u>
Mean response					
rate %	64	70	65	58	48
Unweighted base	654	268	170	141	1106
	%	%	%	%	%
Overseas	63	56	78	22	51
London boroughs	23	28	10	44	26
Rest U.K.	14	16	12	34	23
Female	44	43	36	47	54
Under 25	21	34	14	27	36
55 or over	28	11	24	12	12
Mean age (actual)	41	34	42	36	34
Students	39	39	36	26	42

Fig 2-8 Selected demographic variations in audience profile by category of production, 1985/86

Base = all respondents surveyed for category of production testing

(i) Area of residence

In 1982, no production categories drew more than half their audience from overseas, but in 1985/86, thrillers, traditional and Broadway musicals and comedies all had audiences of whom more than half of whom were from overseas. All categories of production except opera and classical plays drew a higher percentage of their audience from overseas in 1985/86 than in 1982. The highest

percentages of overseas visitors were found at thrillers, in both survey periods. The overseas percentage of the audience for musicals was also consistently high.

In 1982, dance and children's/family shows had the lowest overseas percentages among their audiences. In the case of children's/family shows, the low overseas percentage was almost certainly due to the productions surveyed being aimed largely at theatre-goers seeking a Christmas/New Year holiday outing for young children. In 1986, however, the production selected for this category was thought to be aimed at a broader family audience; the overseas percentage of this audience was much higher than that of either of the children's/family shows surveyed in 1982. Dance, opera and classical plays attracted the lowest percentages from overseas in 1985/86.

The apparent preference of overseas visitors for thrillers and musicals, and relative lack of interest in opera, dance and classical plays, may have been partly the result of two external factors. Firstly, for many opera, dance and classical play productions in London, priority booking is offered to mailing list members, and this can result in popular productions being sold out well in advance of the performance date, so that interested visitors to London might find ticket availability for such productions close to the performance date very restricted. However, as high percentages of overseas visitors were found at popular musical productions such as Cats, which are sold out for

several months in advance, this factor should not be overemphasised as an explanation for a low overseas percentage of an audience. Secondly, most of the production categories apparently favoured by overseas visitors included specific productions which at the time of the survey had had long runs, so that interested local residents would be likely to have seen the production at an earlier stage in the run, and visitors to London would therefore inevitably form the bulk of the audience at later stages of the run. It may also have been the case, however, that a real preference among overseas visitors for those categories of production was in itself the cause of the long runs, since there would be a constantly changing pool of interested theatre-goers to draw on.

The highest percentages of London boroughs residents were found at dance performances in 1982 and at opera performances in 1985/86. Classical plays and modern drama also attracted high percentages of London boroughs residents, and these four categories attracted a consistently higher percentage of local residents than the other six. The lowest percentages of London boroughs residents were found at thrillers and musicals.

The highest percentages of residents of the U.K. from outside London were found at revues, children's/family shows, and modern musicals in 1982, and at children's/family shows and modern drama in 1985/86. The lowest percentages of this area of residence group were

found at classical plays and modern drama in 1982, and at thrillers and traditional musicals in 1985/86. There was less consistency between the two survey periods among this group in the categories of production they apparently favoured, than there was among London boroughs residents or overseas visitors. All categories except modern drama and classical plays showed a decrease in 1985/86 in the percentage of their audience who came from parts of the U.K. outside London.

Opera, dance and classical play audiences showed the least change in area of residence distribution over the two survey periods, with London boroughs residents consistently accounting for more than half the audience in each case. Traditional musicals and thrillers showed the greatest change, both showing a large increase in the percentage of their audience who were from overseas in 1985/86.

(ii) Sex

In 1982, women formed a higher percentage of the audience for all categories of production than men did. Women predominated most among dance, children's/family show and modern drama audiences, with men forming higher percentages of the audiences for opera and revue than for other categories of production. In 1985/86, women accounted for the majority of the audience for only dance, modern drama and Broadway musical productions. Men predominated particularly among thriller, comedy and traditional musical

audiences. All categories in 1985/86 had a lower female percentage of the audience than in 1982.

(iii) Age

Revue and opera audiences had the oldest mean ages in 1982, opera and thriller audiences in 1985/86. The modern drama, modern musical and dance audiences consistently had the youngest mean ages. A mean age of 35 or over was consistently found among opera, classical play, thriller and children's/family show audiences, and a mean age under 35 among dance, modern drama, and modern musical audiences. The mean age of the opera, modern drama, classical play, traditional musical and thriller audiences increased in 1985/86, while for the other categories it decreased.

The highest percentages of under 25's were found at traditional musicals and dance in 1982, and at modern and Broadway transfer musicals in 1985/86. The lowest percentages of under 25's were found at revues, children's/family shows (the under 16's being specifically excluded) and opera in 1982, and at thrillers, classical plays and opera in 1985/86.

The highest percentages of 55 and overs were found at revues, opera and children's/family shows in 1982 (perhaps in the last case because of grandparents accompanying grandchildren) and at traditional musicals, thrillers and opera in 1985/86. The lowest percentages of 55 and overs

were found at modern musicals, modern drama and traditional musicals in 1982, and at modern musicals, dance and modern drama in 1985/86.

(iv) Students and final education levels

The highest percentages of full-time students were found at dance, classical play and comedy productions in 1982, and at Broadway musicals, modern and traditional musicals and comedy productions in 1985/86. All categories showed a large increase in the percentage of their audience who were students in 1985/86, with the highest percentage increases among modern musical audiences and the lowest among dance and classical play audiences. The prominence of students among the dance and classical play audiences in 1982 suggested that educational group outings were important in these categories of production. The fact that these categories lost their prominence as the productions with the highest percentages of students in 1985/86 was probably connected with a decrease in educational outings during the second survey period owing to teachers' industrial action. The overall percentage of the West End audience who were full-time students increased in 1985/86, however. Chapter 5 gives a full account of organised group theatre visits in both survey periods.

In 1982, a question on final level of education among non-students was included in the demographic questions. The classical play audience had the highest percentage who had

been educated full-time to the usual U.K. tertiary education level age of 19 or over. The modern drama, dance and opera audiences also had a high percentage who had received tertiary level education. The lowest percentages to have received tertiary level education were found among the revue and children's/family show audiences. With children's/family show audiences, the low percentage receiving tertiary education may have been related to many respondents having had children in their late teens and early twenties. The revue audience had the oldest mean age of any of the categories examined in 1982, and the low percentage of this audience receiving tertiary level education may have been a reflection of the relatively poorer higher education opportunities during the teenage years of many of the respondents. However, although opera audiences had the second oldest mean age, they also had the fourth highest percentage educated to tertiary level. The final education level of respondents evidently played some part in the category of production they were likely to select, rather than mean age in itself, and therefore the likely social conditions during the teenage years of the majority of respondents, being the principal factor in determining final level of education for each category of production audience.

(b) Theatre-going variations

The following tables show selected variations in theatre-going by category of production.

Category of production, 1982

		<u>Modern</u>	<u>Classical</u>	<u>Modern</u>	
	<u>Opera</u>	<u>Dance</u>	<u>Drama</u>	<u>Play</u>	<u>Musical</u>
Mean response					
rate %	56	59	51	53	37
Unweighted base	1650	1372	405	917	849
	%	%	%	%	%
This is first visit	7	7	7	8	41
3 or more other					
visits	80	78	78	79	26
Mean frequency					
(actual)	5	5	4	5	2
On holiday	10	4	10	8	29
Work in London	31	24	27	29	16
today					
Alone	17	8	7	10	5
In twos	57	40	47	53	41
Group of 3-6	25	34	31	24	35
Group of 7 or more	1	18	15	13	19
Agency booking	4	6	6	4	31
Postal booking					
to box office	19	25	20	29	3
Book on day of					
performance	23	13	22	9	25

Fig 2-9 Selected theatre-going variations among audiences,
by category of production, 1982

Base=all respondents surveyed for category of
production testing

Table continued on next page

Category of production, 1982

	<u>Traditional</u>		<u>Children's/</u>		<u>Revue</u>
	<u>Musical</u>	<u>Comedy</u>	<u>Thriller</u>	<u>Family</u>	
Mean response					
rate %	49	50	69	56	30
Unweighted base	828	487	434	161	322
	%	%	%	%	%
This is first visit	20	26	35	22	25
3 or more other					
visits	51	46	31	50	46
Mean frequency					
(actual)	3	2	2	3	2
On holiday	27	27	53	5	21
Work in London	22	30	13	7	21
today					
Alone	4	6	5	2	3
In twos	46	51	48	25	51
Group of 3-6	37	33	45	62	37
Group of 7 or more	13	10	2	11	9
Agency booking	25	12	29	13	20
Postal booking					
to box office	4	1	-	6	4
Book on day of					
performance	41	59	66	51	32

Fig 2-9 Selected theatre-going variations among audiences
by category of production, 1982

Base = all respondents surveyed for category of
production testing

Category of production, 1985/86

	<u>Opera</u>	<u>Dance</u>	<u>Modern Drama</u>	<u>Classical Play</u>	<u>Modern Musical</u>
Mean response					
rate %	39	61	50	45	55
Unweighted base	856	690	275	411	209
	%	%	%	%	%
This is first visit	9	11	13	8	38
3 or more other					
visits	72	76	38	78	32
Mean frequency					
(actual)	4	4	3	4	2
On holiday	9	8	23	14	29
Work in London	32	15	29	7	24
today					
Alone	12	11	6	10	11
In twos	50	57	57	60	54
Group of 3-6	32	23	34	27	27
Group of 7 or more	6	9	3	3	8
Agency booking	11	2	12	3	3
Postal booking					
to box office	13	15	2	22	1
Book on day of					
performance	15	21	31	16	52

Fig 2-10 Selected theatre-going variations among
audiences, by category of production, 1985/86

Base=all respondents surveyed for category of
production testing

Table continued on next page

Category of production, 1985/86

	<u>Traditional</u>		<u>Children's</u>		<u>Broadway</u>
	<u>Musical</u>	<u>Comedy</u>	<u>Thriller</u>	<u>Family</u>	<u>Musical</u>
Mean response					
rate %	64	70	65	58	48
Unweighted base	654	268	170	141	1106
	%	%	%	%	%
This is first visit	41	51	51	13	34
3 or more other					
visits	34	29	20	53	35
Mean frequency					
(actual)	2	1	1	3	2
On holiday	56	47	79	26	45
Work in London	15	20	9	30	12
today					
Alone	7	7	6	9	5
In twos	51	45	70	70	46
Group of 3-6	30	39	19	16	36
Group of 7 or more	12	9	5	5	13
Agency booking	22	20	15	12	26
Postal booking					
to box office	2	2	2	10	6
Book on day of					
performance	52	54	62	20	40

Fig 2-10 Selected theatre-going variations among audiences,
by category of production, 1985/86

Base = all respondents surveyed for category of
production testing

(i) Frequency of London theatre-going

Mean frequency of London theatre-going was consistently highest among opera, dance and classical play audiences. Although it was not possible to tell from the results of these surveys whether these groups were frequent theatre-goers to all types of theatre, or primarily to productions in that particular category, a subsequent series of surveys at English National Opera productions in 1985 indicated that the latter was the case for ENO audiences.⁽⁷⁾ Other categories whose audiences had a consistently high mean frequency of London theatre-going were modern drama and children's/family shows. Opera, dance and modern drama audiences were the least likely in 1982 to be on their first visit in 12 months to a London theatre, classical play and opera audiences in 1985/86.

The lowest mean frequency of London theatre-going was found among audiences for modern musicals, comedies, thrillers and revues in 1982, and among comedy and thriller audiences in 1985/86. Mean frequency of London theatre-going in the past 12 months was only 1 visit among comedy and thriller audiences in 1985/86. The percentage who were making their first visit in 12 months to a London theatre was highest among the modern musical and thriller audiences in 1982, and the thriller and comedy audiences in 1985/86. For the majority of the thriller and comedy audiences in 1985/86, the performance surveyed was their only visit in 12 months to a London theatre.

There was a general decline in frequency of London theatre-going in 1985/86 among audiences for all categories of production except modern musicals and children's/family shows.

(ii) Reason in central London on day of performance

Those who were on holiday in the central London area that day formed much higher percentages of thriller audiences than of those for other types of production. Audiences for musicals and comedies also contained high percentages of holidaymakers. Dance audiences were consistently the least likely to be in central London on holiday.

Opera audiences were consistently the most likely to have work or business in London on the day of performance.

(iii) Size of group attending the theatre

For all production categories, except children's/family shows in 1982 only, attending the theatre as one of a twosome was most common.

Opera audiences were the most likely to attend the theatre alone, in both survey periods. Dance and classical play audiences were also consistently more likely than average to attend the theatre alone. Children's/family show and revue audiences were the least likely to attend alone in 1982; in the case of audiences for the former category of

production, the primary purpose of the theatre visit for the majority of the audience was likely to have been to bring children to the theatre. In 1985/86, the Broadway musical audience was the least likely to visit the theatre alone.

Small groups of 3-6 formed a much higher percentage of the audience for children's/family shows than for any other category in 1982. Observation of the children's/family audiences indicated that the most common grouping at those productions surveyed in 1982 was two adults with three or four children, and that it was unusual to find one adult attending with one child, whereas at the 1986 children's/family show production surveyed, one adult with one child was a fairly common combination. Although children under 16 were specifically excluded from the surveys, rough head counts indicated that around two-thirds of the audience for the 1982 productions of children's/family shows surveyed were children under 16, and around one-fifth of the audience for the children's/family show surveyed in 1985/86.

Small groups of 3-6 also accounted for high percentages of the audience for thrillers in 1982, and for comedies and Broadway musicals in 1985/86.

Large groups of 7 or more were most important among the modern musical, dance and modern drama audiences in 1982,

and among the Broadway musical, traditional musical, dance and comedy audiences in 1985/86. Opera and thriller audiences were the least likely to be part of a large group in 1982, modern drama and classical play audiences in 1985/86.

All categories of production except opera and thrillers showed a decline in the percentage of their audience accounted for by large groups in 1985/86. The decline was most marked among modern musical, classical play and modern drama audiences. The large groups section of the audiences for classical plays was likely to have been affected by the teachers' industrial action, but there was also an apparent decline in 1985/86 in other types of organised coach trips for the West End overall. The organised coach trip had accounted for a large part of the groups business for modern musicals in 1982.

(iv) Booking tickets

Agency bookings accounted for higher percentages of modern and traditional musical and thriller bookings than those for any other categories in 1982. In 1985/86, the highest percentages of agency bookings were for Broadway musicals, traditional musicals, and comedies. Dance and classical play audiences were consistently among the least likely to obtain their tickets through an agency.

In 1982, postal booking to the box-office was much higher

for opera, dance, modern drama and classical plays than for other categories. In 1985/86, the percentage of bookings made by post declined for all categories except children's/family shows, and only opera, dance and classical plays maintained a level of postal bookings of more than 10% of total bookings. At all the productions surveyed under the opera, dance and classical play headings in both survey periods, priority postal booking through membership of the mailing list scheme was available, and this probably accounted for the relatively high level of postal booking for these categories of production.

Day of performance booking was highest among thriller and comedy audiences in both survey periods; lowest among classical play and dance audiences in 1982, and opera and classical play audiences in 1985/86.

(c) Summary of category of production variations in audiences

Although there were variations in the composition of the audience for each category of production over the two survey periods, certain broad trends were consistent. These included; high percentages from overseas at musicals, thrillers and comedies, and high percentages of London boroughs residents at classical plays, opera and dance; young audiences for dance, modern musicals and modern drama, and older audiences for opera, thrillers, classical plays and children's/family shows; high percentages of

women at dance and modern drama, and higher than average percentages of men at opera and classical plays. Changes in theatre-going characteristics could usually be related to the demographic changes, and to the typical patterns of theatre-going among the dominant demographic groups.

The indications were that there was a strong core audience for each of the categories of productions examined, and that changes in the audience profile of each category between the two survey periods could be largely explained by broad changes in the West End audience as a whole. For example, the aggregated analysis revealed a higher percentage of overseas visitors in the West End audience in 1985/86 than in 1981/82, and this had differing effects on each category, depending on how likely they had previously been to attract overseas visitors.

The analysis by category of production provided further evidence to support the theory that although the composition of the audience as a whole may change from year to year, the way in which that audience will tend to be distributed - by category of production, by day of the week, or by time of year - is likely to be broadly consistent.

The following is a brief summary of the most important variations in demographic and theatre-going characteristics between each category of production audience.

(i) Opera

A high percentage of the audience were local residents, and a low percentage from overseas. Men formed a higher than average percentage of the opera audience. They had one of the oldest mean ages, with a low percentage under 25, and a high percentage aged 55 and over. The percentage of students was low, but the non-student audience was highly educated. The opera audience were very frequent London theatre-goers, and it is likely that they were primarily frequent opera-goers. They were the most likely audience to be working in London on the day of performance. They were the most likely audience to attend the theatre alone, and among the least likely to be part of a large group. Their advance and postal booking was high.

(ii) Dance

The dance audience were predominantly local residents. The dance audience were more predominantly female than were audiences for any other category of production. In contrast to opera, they were among the youngest audience, with low percentages of 55 and overs. Students were more important than among the opera audience, and final level of education among non-students was slightly higher. The dance audience were very frequent London theatre-goers. Large parties formed an important section of the dance audience. Advance postal bookings were high among the dance audience.

(iii) Modern drama

The audience for modern drama in 1982 were most likely to be local, but in 1985/86, visitors to London formed a larger section of the modern drama audience than locals did. The modern drama audience were consistently more likely to be female than male. The percentage of the audience for modern drama who had been educated to tertiary level in 1982 was higher than for any category of production except classical plays. The modern drama audience were less frequent London theatre-goers than were the opera or dance audiences.

(iv) Classical Play

The classical play audience consisted primarily of local residents, although higher percentages were from overseas than among dance or opera audiences. The classical play audience were slightly more likely than average to be male. The mean age of the classical play audience was relatively old, although younger than that for opera. They were the most likely audience to have been educated to tertiary level in 1982. The classical play audience were largely frequent London theatre-goers, and they were more frequent London theatre-goers than modern drama audiences. They were more likely than average to attend the theatre alone. Advance postal bookings among the classical play audience were high.

(v) Modern Musical

A high percentage of the modern musical audience were tourists. In 1982, they were most likely to be British tourists, in 1985/86, overseas tourists. The balance between the sexes varied between productions of modern musicals, although the modern musical audience overall were slightly more likely than average to be female. The modern musical audience had a relatively young mean age, with a low percentage of over 55's. Non-students among the modern musical audience had a lower than average level of tertiary education. The modern musical audience were largely infrequent London theatre-goers, with a high percentage not having made any other visits at all to London theatres in the previous 12 months.

(vi) Traditional Musical

A high percentage of the traditional musical audience were from overseas. The traditional musical audience were more likely to be male than were the audiences for modern musicals. They had the same mean age as the modern musical audience in 1982, but a considerably older mean age in 1985/86. The percentage of non-students who had received tertiary education was relatively low. They were slightly more frequent London theatre-goers than modern musical audiences. Traditional musicals were the only category for which the large party trade formed an important section of the audience in both survey periods. Day of performance and agency bookings were high.

(vii) Comedy

In 1982, the comedy audience were the most evenly distributed among the three area of residence groups of any category of production audience, but in 1985/86, overseas visitors predominated, and the comedy audience had one of the highest percentages of overseas visitors and one of the lowest percentages of London boroughs residents in the second survey period. Holidaymakers, both overseas visitors and U.K. residents, formed a higher than average percentage of the comedy audience. The comedy audience were slightly more likely than average to be male. They consistently had a mean age in the middle range of the categories of production. Mean frequency of London theatre-going was lower than for any category of audience except thrillers. Day of performance booking was, higher than for any category except thrillers.

(viii) Thriller

The thriller audience contained higher percentages of overseas visitors, holidaymakers, and visitors to London in the audience than did the audience for any other category of production. The mean age of the thriller audience was amongst the oldest. In 1982, the age distribution of the thriller audience suggested that family parties were important, and women predominated among the thriller audience. In 1985/86, however, the appeal of thrillers was primarily to the middle-aged theatre-goer, and a higher percentage of the audience were male than for any other

category. Mean frequency of London theatre-going was very low among the thriller audience. The thriller audience were consistently the most likely to book on the day of performance.

(ix) Children's/Family Show

Adults accounted for an estimated one-third of the audience at those productions aimed specifically at young children, with two adults with three or four children being the most usual combination. At the production aimed at a broader family audience, adults accounted for an estimated four-fifths of the audience, and one adult with one child was a fairly common combination. The appeal of those shows aimed at young children were to an almost exclusively British audience - perhaps the majority of overseas visitors to London did not bring children with them - and although a higher percentage of the 1986 children's/family show audience were from overseas, the overseas figure was still lower than average. The mean age of the children's/family show audience in 1982 was higher than average, and women predominated. The 1986 children's/family show audience were fairly evenly balanced between the under and over 35's and between men and women. Students formed a low percentage of children's/family show audiences, and the percentage of non-students who had received tertiary level education in 1982 was low. London theatre-going was in general more frequent than among the musical, comedy or thriller audiences, but less frequent than among those other categories of production which had a high percentage

of U.K. residents in the audience. The need to take children with them or to arrange babysitters would have restricted the frequency of London theatre-going of the typical children's/family show audience.

(x) Revue

A revue was surveyed only in 1982. Although only one production was surveyed in this category, on two occasions, the findings suggested that the audience for revues was likely to be highly production specific, rather than being capable of generalisation over a range of revues. The audience for the revue surveyed, Underneath the Arches, were primarily elderly theatre-goers, with a higher mean age than for any of the other categories of audience examined. Most of them would have been in their twenties at the height of the popularity of Flanagan and Allen, the comedy duo who were the subject of the revue surveyed. 5% of respondents overall at these surveys said that the most important attraction of this production was nostalgia. 50% of the revue audience were U.K. residents from outside London, and there were more women than men. A very different profile would almost certainly have been obtained from an audience for a modern revue.

The box-office sales research indicated that attendances in this category were much the most volatile of any category, with major fluctuations in sales and percentage of capacity filled as particular productions opened or closed.⁽⁸⁾

This also implied less of a common audience for revues than for most other categories, where attendances were more stable over time, regardless of which specific productions were playing.

The likely lack of consistent audience profiles in the revue category had little material effect on the accuracy of the aggregated assessment of the West End audience, however, since revues accounted for less than 2% of West End attendances in both survey periods.

(xi) Broadway Transfer Musical

The Broadway transfer musical audience was surveyed only in 1985/86. The audience was in general similar to those for modern and traditional musicals, with a high percentage from overseas. They also displayed some similarity to the audience for comedy in 1985/86, with a similar age and area of residence distribution, although they were more frequent London theatre-goers than the comedy audience.

Notes to Chapter 2

- (1) For tables giving percentages of unweighted base figures, an indication of the error associated with sampling can be obtained by calculating the square root of the number of respondents giving each reply, and expressing the result as a percentage of the base figure. This applies to all tables in this study which give results from unweighted bases.
- (2) The base figures for individual questions varied slightly, so that the base figures given represent the total number of questionnaires analysed in each category. This applies to all tables in this study which summarise answers to more than one question.
- (3) Mean age was calculated by multiplying the number of respondents in each age band by the mid-point of that band, adding the results, then dividing by the total number of respondents. The mid-point of the highest category was taken as being the lower point of that category plus half the difference between the lower and upper points of the previous category. Figures given are to the nearest full year, and represent the mean age of the adult (i.e. over 16) audience.

(4) The surveys sampled attendances rather than individuals. Each individual's chance of being sampled therefore increased in proportion to their frequency of London theatre-going. In order to arrive at a figure for mean frequency of London theatre-going among any audience grouping - for example, Saturday night audiences, opera audiences, 19-24 year old theatre-goers - weights inversely proportional to frequency of theatre-going had to be applied if the audience were to be considered as individuals. The number of responses in each frequency band was weighted with a figure inversely proportional to the mid-point of that frequency band, and the results for each band added. The resulting figure would be equivalent to the number of individuals who are likely to have been sampled. The total number of responses for the relevant survey(s) or question(s) would then represent the number of attendances made by those individuals. The latter figure, when divided by the former, therefore gives the mean frequency of London theatre-going of a particular audience grouping when considered as individuals. This calculation was performed even when the results of one survey only were analysed, since that survey was intended to represent the audience for a particular category of production, or similar variable. The weighting procedure was not applied, however, in the case of the calculation of other means, such as mean age, so that other means in this study are based on the total audience as a group, not as individuals.

The mid point of the highest frequency category was taken as being the lower point of that category plus half the difference between the upper and lower points of the previous category. All figures for mean frequency throughout this study relate to visits in the 12 month period preceding the survey, and include the performance surveyed, unless otherwise indicated. Figures are given to the nearest whole number of visits.

This note applies to all calculations of mean frequencies of London theatre-going throughout this study.

- (5) This preference of overseas visitors for the early part of the week in their theatre-going is evidence that a substantial element of bias was introduced into the Wyndham's Theatre Group study discussed in Chapter 1, which Bernard Levin quoted in the Sunday Times as producing a high overseas percentage for the West End audience overall, since the research was conducted only on Mondays. See Bernard Levin, The Sickness at the Heart of London's Theatre, Sunday Times, January 29, 1978. This article is reproduced in Appendix 1.

- (6) See note (15), Chapter 1, for a detailed description of the booth and its method of operation.

(7) Gardiner, Caroline, Audiences for English National Opera, 1985, unpublished report.

(8) Gardiner, Caroline, West End Theatre attendances, unpublished annual report for SWET, from 1981.

CHAPTER 3 DEMOGRAPHIC PROFILE OF THE WEST END AUDIENCE

(1) Area of residence

The weighted aggregated figures for each of the two main survey periods produced the following results for the distribution of the West End audience by area of residence.⁽¹⁾ Estimated attendances represented by each area of residence category are given in brackets.⁽²⁾ A detailed analysis of each area of residence group and of their importance to the West End theatre follows.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11741	6534
<u>Area of Residence</u>	% (millions)	% (millions)
Overseas	27 (2.4)	37 (3.9).
London boroughs	40 (3.5)	37 (3.9)
Rest of U.K.	33 (2.9)	26 (2.8)

Fig 3-1 Distribution of the West End audience, by area of residence

Base=all respondents

(a) Overseas visitors

The percentage of the West End audience accounted for by overseas visitors had been the most debated aspect of the audience profile prior to the research programme. The surveys produced figures of 27% of attendances during the 1981/82 survey period being accounted for by overseas visitors, and 37% during the 1985/86 survey period. Both

of these figures are below most previous estimates,(3) even when the 1% of the audience who were excluded from the surveys because they spoke little or no English are taken into account.

The percentage of the West End audience accounted for by overseas visitors had shown signs of a steady increase on the 1981/82 figures during the 1983 survey programme. Actual attendances by overseas visitors also increased substantially between 1981/82 and 1985/86. In 1981/82, attendances by overseas visitors were estimated at around 2.4 million; in 1985/86 they were estimated at around 3.9 million, an increase of 63%. Total West End attendances during the 1985/86 survey period were 20% higher than in 1981/82. Most of the increase in West End attendances between the two survey periods was accounted for by overseas visitors, so that a higher percentage of the overall audience being from overseas in 1985/86 did not mean that attendances had fallen among U.K. residents.

The percentage of the West End audience, which was accounted for by overseas visitors varied with the time of year, with the summer months being the peak period.

Visitors from the U.S.A. accounted for around half of all attendances by overseas visitors in both 1981/82 and 1985/86. U.S.A. residents accounted for around 1.1 million attendances in 1981/82, 13% of the total, and around 1.9

million in 1985/86, 18% of the total, a rise of around 70%. Attendances by overseas visitors from Canada and the Scandinavian countries also showed particularly large percentage increases in 1985/86. Attendances by Canadians increased from around 170,000, or 2% of the total in 1981/82, to around 420,000, or 4% of the total in 1985/86. Visitors from the Scandinavian countries accounted for around 90,000 attendances, or 1% of the total in 1981/82, and around 450,000 attendances or 4% of the total in 1985/86, a five-fold increase. Sweden in particular proved to be a very important source of overseas visitors in the 1985/86 survey period, when it accounted for the third largest group of overseas visitors, moving from eighth place in the 1981/82 surveys.

In 1981/82, the ten largest overseas groups, in order of size, and with estimated attendances to the nearest 10,000 accounted for by each group given in brackets, were; - the U.S.A. (1.1 million), Canada (170,000), Australia (160,000), South Africa (90,000), West Germany (80,000), Netherlands (70,000), Eire (60,000), Sweden (50,000), New Zealand (50,000), and Israel (50,000). Only four out of the ten largest overseas groups were from Europe in 1981/82. All the non-European countries among the ten most important were those in which English was either the official language or was widely spoken. In the 1985/86 surveys, the ten largest overseas groups, in order of size, were; U.S.A. (1.9 million), Canada (400,000), Sweden (210,000), Australia (200,000), Denmark (140,000),

Switzerland (100,000), France (90,000) West Germany (90,000,) Eire (80,000), and the Netherlands (60,000). Although the U.S.A. and Canada remained throughout the surveys by far the most important sections of the overseas visitor audience, and all the other overseas countries represented were well below the U.S.A. in importance, the increased importance of the European section of the overseas visitor audience in 1985/86 was particularly marked when compared with 1981/82, with seven of the ten largest groups coming from Europe.

The following table shows the percentage of all overseas visitors to the U.K. during the nearest calendar years to the two main survey periods who were from each area of the world. This is compared with the percentage of total West End attendances by overseas visitors which were accounted for by each of these groups. The actual numbers of people and attendances that each of these sets of figures represents follow the percentage figures in brackets.

1981/82

	<u>overseas</u> <u>visitors</u>	<u>West End</u> <u>attendances by</u> <u>overseas visitors</u>
Base	181000 (4)	3168
<u>Area of residence</u>	% (millions)	% (millions)
N.America(inc.Canada)	18 (2.1)	54 (1.3)
W. Europe	61 (7.1)	21 (0.5)
Other	21 (2.4)	25 (0.6)

1985/86

	<u>overseas</u> <u>visitors</u>	<u>West End</u> <u>attendances by</u> <u>overseas visitors</u>
Base	169000	2410
<u>Area of residence</u>	% (millions)	% (millions)
N.America(inc.Canada)	26 (3.8)	59 (2.3)
W.Europe	55 (8.0)	23 (0.9)
Other	19 (2.8)	18 (0.7)

Fig 3-2 Distribution of overseas visitors to the U.K.,
by area of residence, compared with attendances
accounted for by each group

Base=all overseas visitors

North Americans (including Canadians) were much more likely than the other groups of overseas visitors to the U.K. to attend the theatre in London. A very small percentage of Western European visitors to the U.K. did so.

In all, 66 different overseas countries were represented in West End theatre audiences in the two main survey periods. A full list is given in Appendix 6.

Frequency of London theatre-going was lower among overseas visitors than among U.K. residents. The mean number of visits to London theatres during the preceding 12 months, including the performance surveyed, was 2 visits for overseas visitors and 3 visits for U.K. residents.⁽⁵⁾ 1985/86 figures were 1 and 2 visits respectively. This did not necessarily reflect a relative lack of interest in London theatres among overseas visitors, since they would typically only have access to London theatres for a few days in any 12 month period. A question on frequency of theatre-going outside London was included in the 1981/82 surveys, and 12% of overseas visitors and 7% of U.K. residents proved not to have attended any theatres at all in the last 12 months, apart from the performance surveyed. This suggested that overseas visitors were less committed and interested theatre-goers than U.K. residents. It is possible that many overseas theatre-goers would have lived in areas with little theatre provision, and would have a greater distance to travel to their nearest theatre than would be the case for most U.K. residents, but it is none the less reasonable to infer that for some overseas visitors a theatre visit in London was part of a general tourist itinerary, rather than being prompted by a strong interest in theatre as such.

Since the surveys sampled attendances, and since total West End attendances showed a large increase between 1981/82 and 1985/86, the decrease in mean frequency of London theatre-going among overseas visitors between 1981/82 and 1985/86, at the same time as they accounted for a higher percentage of total attendances, meant that the number of overseas visitors attending the London theatre was much greater in 1985/86 than in 1981/82, with more people attending the theatre fewer times each in 1985/86. The number of overseas visitors attending West End theatres could be estimated at around 1.4 million in 1981/82 and 2.6 million in 1985/86. This represents an increase of around 86% in the number of overseas visitors attending the London theatre between the two survey periods. The number of overseas visitors attending the London theatre was equivalent to around 20% of all overseas visitors to London during 1982 and 29% of overseas visitors to London during 1985.⁽⁶⁾ Evidently there was a greater degree of interest in the London theatre among overseas visitors to London in 1985/86 than in 1981/82.

The 1985/86 surveys included questions on whether other visits to London had been made by overseas visitors during the past 12 months, and on how important a factor London's theatres were in persuading them to visit London. There were variations according to the time of year. For surveys between December 1985 and February 1986, an average 25% of overseas visitors were on a repeat visit to London, and 27% said that London's theatres were a very important

attraction. March to April 1986 figures were 20% and 29% respectively, May to August 1985 figures 17% and 19% and September to November 1985 figures 21% and 37%. The highest percentage of committed theatre-goers was therefore found outside the peak tourist season, with the summer overseas visitor least likely to have been attracted by the theatres. In the summer months, a theatre visit may have been simply one part of their sightseeing, while for the autumn overseas visitor, the theatres in London were clearly a very strong reason for their choosing to come to London, perhaps for a second holiday.

Overseas visitors tended by and large to select a well-known production, or one with familiar elements in it, such as star name, when theatre-going in London. The percentage of overseas visitors in the audience at a category of production which they did not normally seem to patronise in large numbers was much higher when there were familiar elements of the production, such as a star name in the cast or a Broadway version of the production, than when these elements were not present. Thrillers and musicals were consistently the most popular categories of production among overseas visitors. These are therefore the categories of production most likely to be vulnerable to fluctuations in the levels of overseas tourism to the U.K.

(b) London boroughs residents

The 1981/82 surveys asked respondents to indicate whether they lived in the Greater London Council area. The 1985/86 surveys asked whether they lived in a London borough, and if so, which one. As the G.L.C. was abolished in April 1986, the term London boroughs resident is used throughout this study to denote both those respondents who indicated they were G.L.C. residents in the 1981/82 surveys, and those who indicated they were London boroughs residents in the 1985/86 surveys.

In 1981/82, London boroughs residents formed the largest group of West End theatre-goers, accounting for more attendances than either overseas visitors or other U.K. residents. 40% of attendances in 1981/82 were accounted for by London boroughs residents, and 37% in 1985/86, so that in the second survey period, their prominence decreased, from being the most important group, to being only equally important with overseas visitors. In neither survey period, however, were attendances by London boroughs residents lower than those by overseas visitors, as had sometimes been predicted prior to the research programme. Although the percentage of the overall audience accounted for by London boroughs residents decreased between 1981/82 and 1985/86, actual attendances by London boroughs residents increased from around 3.5 million in 1981/82 to around 3.9 million in 1985/86, a rise of 11%. However, the percentage of the audience who were London boroughs residents was lower in 1983 and in early 1985 than it was

in late 1985 and early 1986, for the same or same category of production, and it is likely that the percentage of the overall audience who were London boroughs residents had been declining throughout 1983 and 1984, as the overseas percentage increased. This trend was apparently arrested in late 1985, when the percentage of the audience who were London boroughs residents began to show signs of growth over the early 1985 levels. As the theatre-going profile of the London boroughs resident proved to have changed much more than that of the other two area of residence groups between 1981/82 and 1985/86, it is probable that there had in fact been a decline in attendances among the previous locally resident audience after 1981/82, but that new local audiences were gained from around mid-1985, and that they accounted for more than sufficient new attendances to compensate for the previous decline.

The 1985/86 surveys provided the necessary data for an analysis of London residents by borough. Almost all the London boroughs were represented. Camden and Lambeth proved to be the largest sources of London resident theatre-goers. The next most important boroughs, in order of importance, were; Kensington and Chelsea, Westminster, Islington, Wandsworth, Southwark and Bromley. Residents of each of these eight boroughs were estimated to account for over 200,000 attendances during the 1985/86 survey period, and between them they accounted for about half of all attendances by London boroughs residents during that survey period. Camden in particular featured as an important

borough in almost all the individual surveys in 1985/86. Of the inner London boroughs, only residents of the City of London accounted for less than about 25,000 attendances during the 1985/86 survey period, and that was almost certainly a result of the small residential population of that borough. The sketch map overleaf (fig 3-3) shows the distribution of estimated attendances by residents of each of the central London boroughs during the 1985/86 survey period.

Although in 1981/82 London boroughs residents accounted for a higher percentage of West End attendances than overseas visitors, and in 1985/86 the same percentage, local residents were, in both survey periods, a much smaller group of people than overseas visitors, since their mean frequency of theatre-going was much higher, at 5 visits in the preceding 12 months in 1981/82, and 4 visits in 1985/86. Around 0.7 million London boroughs residents were estimated to have attended the London theatre in 1981/82, and around 1.0 million in 1985/86. In 1981/82, this was equivalent to around half the number of London theatre-going overseas visitors, and in 1985/86, less than half. These figures are equivalent to around 6% of the population of the Greater London area attending the theatre in 1981/82, and 9% in 1985/86. This increase is further evidence that a new local audience was gained in 1985/86.

Because of the small number of London boroughs residents who visited the West End theatre, categories of production

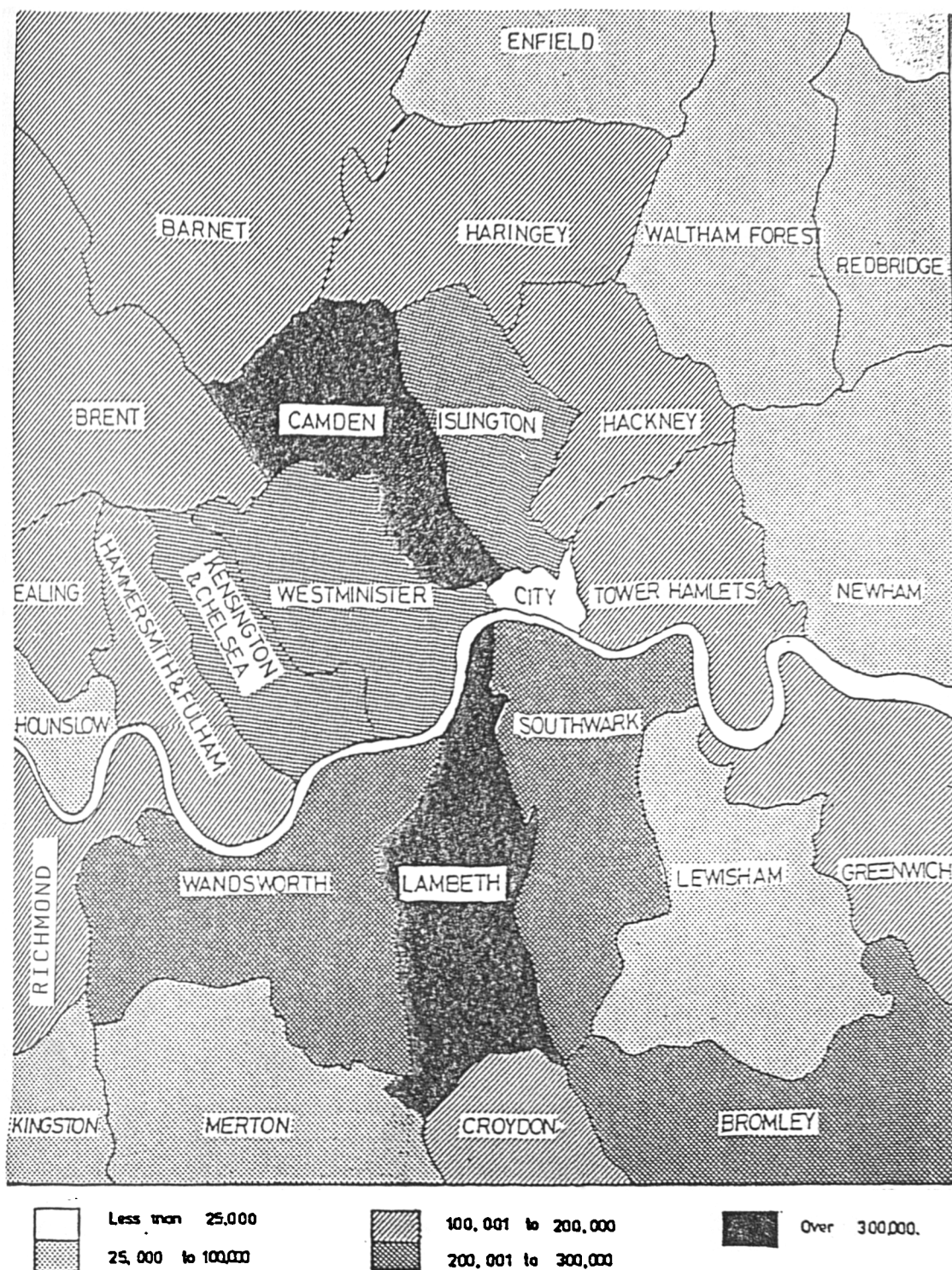


Fig 3-3 Distribution of estimated attendances by residents of central London boroughs, 1985/86

which relied heavily on a locally resident audience, such as dance, opera and classical plays, would be particularly vulnerable to any decrease in theatre-going among locals. The results of the box-office sales section of the research programme showed that dance productions in particular experienced a decrease in attendances during periods when the audience surveys suggested that theatre-going by London boroughs residents generally was in decline.⁽⁷⁾ The stress placed by much press comment in 1986 on the importance of the number of the overseas visitors to London as an indicator of the fortunes of the West End theatre, particularly in the context of the large number of Americans supposedly deterred from visiting London in the summer of 1986 by terrorist threats (two examples are reproduced in Appendix 7), was therefore misplaced in the case of many West End productions. Several categories of production would suffer much more from small decreases in the numbers of London boroughs residents attending the London theatre than from fluctuations, however large, in the level of overseas tourism.

(c) Rest of the U.K.

In the 1981/82 surveys, U.K. residents other than those from London boroughs were asked in the questionnaire to divide themselves into two groups, the first consisting of those who lived roughly within a 40 mile radius of the then G.L.C. area (more or less equivalent to the area termed the home counties) and the second containing the remaining U.K. residents. The questionnaire options were divided in this

way on the assumption that the first category would have relatively easy access to London theatres, either by being commuters, or by being readily able to take a day trip to London, and that the second were most likely to be longer term visitors to London, although many people do commute to London from further afield than the home counties. For the 1985/86 surveys this became a more detailed question, and all U.K. residents from outside London were asked to write in the name of the town they lived in. These replies were subsequently categorised by county or region,⁽⁸⁾ while note was taken of the towns most often mentioned.

U.K. residents from outside London accounted for 33% of attendances in 1981/82 and 26% in 1985/86, in both cases with about half from the home counties areas and half from other parts of the U.K.. Although the percentage of the overall audience accounted for by theatre-goers from these areas decreased in 1985/86, in fact attendances by this group remained very stable at around 2.9 million in 1981/82 and around 2.8 million in 1985/86, a fall of only 3% between the two survey periods.

When details on towns lived in were requested in the 1985/86 surveys, the counties or regions which accounted for the highest numbers of attendances among this area of residence group proved to be Essex, Surrey, Kent and Hertfordshire. The counties or regions which accounted for the lowest levels of attendances were Wales, Shropshire, Cornwall and the North of Scotland. The ten towns which

accounted for the highest levels of attendances were, in order of importance; Oxford, Watford, Edinburgh, Reading, Glasgow, Cambridge, Sheffield, Liverpool, St. Albans and Ipswich, all large towns with good rail links to London. The sketch map, fig 3-4 overleaf, shows the distribution of attendances by residents of each of the British mainland counties and regions, including the Greater London area, for the 1985/86 survey period.

As with attendances, the number of individual theatre-goers from areas of the U.K. outside London remained fairly stable between the two survey periods. Around 1.3 million theatre-goers in 1981/82, and 1.4 million in 1985/86 were estimated to have come from these areas of the U.K. Mean frequency of theatre-going among this area of residence group was also stable, at 2 visits in the preceding 12 months, to the nearest whole number of visits, in both survey periods.

Theatre-goers from these areas were particularly important among the audiences for children's and family shows.

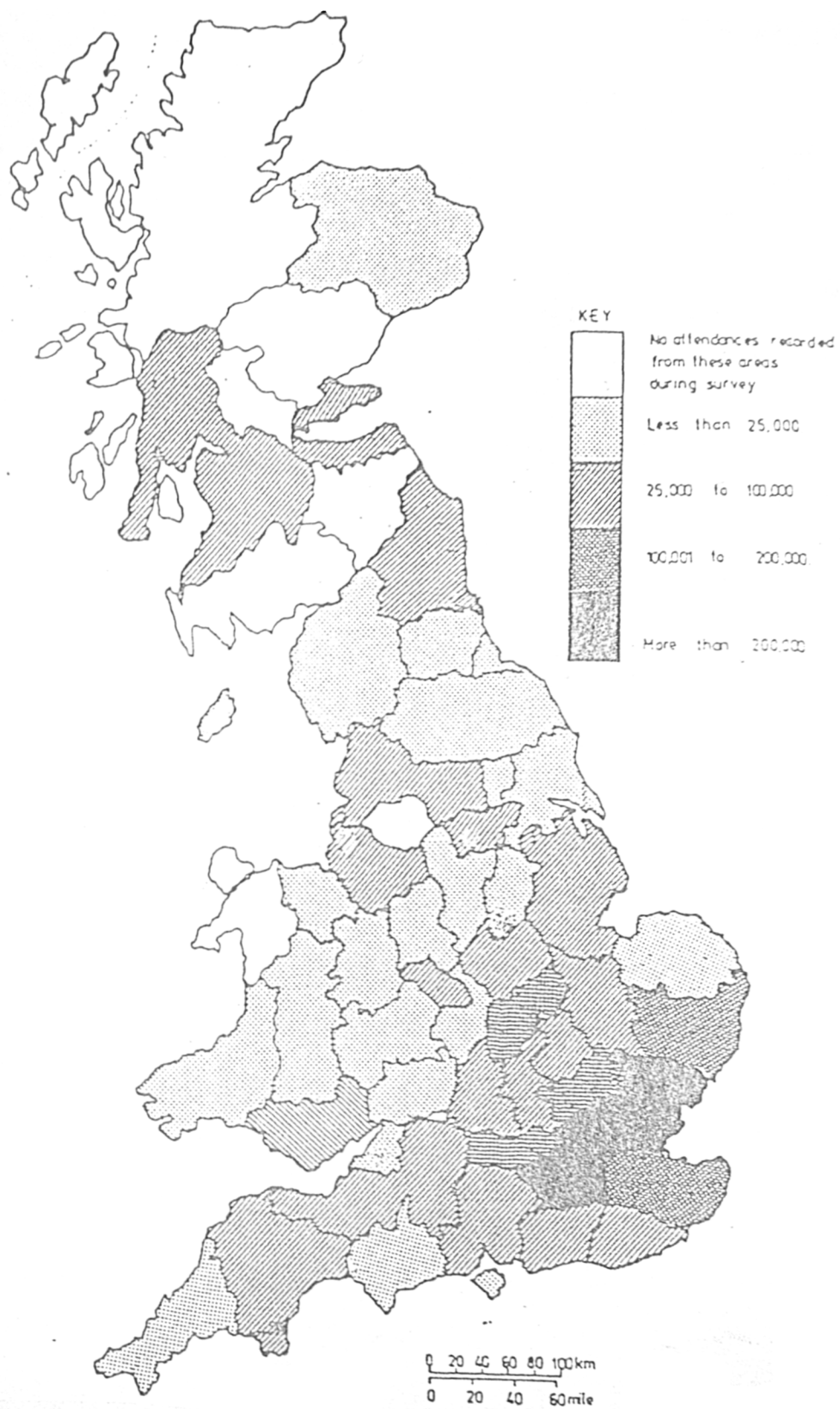


Fig 3-4 Distribution of estimated attendances by residents of British mainland counties and regions, 1985/86

(2) Sex

The table below shows the percentage of the West End audience accounted for by men and women. The estimated attendances these percentages represented follow in brackets.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11734	6528
<u>Sex</u>	% (millions)	% (millions)
Female	58 (5.1)	49 (5.2)
Male	42 (3.7)	51 (5.4)

Fig 3-5 Distribution of the West End audience, by sex

Base = all respondents

In 1981/82, the West End audience was predominantly female, with 58% of attendances accounted for by women. In 1985/86, the percentage of the audience who were male as well as the number of attendances by men showed a large increase. Most of the increased attendances in 1985/86 were accounted for by men. There was evidence of a decline in frequency of London theatre-going among women in 1985 when compared with 1981/82, although there was a slow growth in attendances by women again in early 1986. For the 1985/86 survey period as a whole, the balance between the sexes came very close to being even. Attendances by women increased by about 2% in the 1985/86 survey period, when compared with 1981/82, but this was a very small increase when compared with the 46% increase in attendances by men.

Despite the overall change in the balance of the sexes between 1981/82 and 1985/86, when the audiences for individual categories of show were examined, dance and musicals retained a predominantly female audience throughout the surveys. Other categories of production showed more variations in the male/female balance between the survey periods.

The following table shows the sex distribution of each area of residence group. 1981/82 figures are given first, 1985/86 figures follow, in brackets.

	<u>Area of Residence</u>		
		<u>London</u>	
	<u>Overseas</u>	<u>Boroughs</u>	<u>Rest U.K.</u>
Weighted base	3140 (2411)	4693 (2418)	3880 (1701)
<u>Sex</u>	%	%	%
Female	53 (41)	59 (56)	55 (50)
Male	47 (59)	41 (44)	45 (50)

Fig 3-6 Distribution of each area of residence group,
by sex

Base = all respondents

In 1981/82, women formed the majority of each area of residence group. The percentage of women was highest among London boroughs residents, and lowest among overseas visitors. In 1985/86, the sex distribution of overseas

visitors shifted in favour of men. Only overseas visitors in 1985/86 were more likely to be male than female, but because of the increased importance of overseas visitors in the West End audience as a whole in 1985/86 and because the percentage of each area of residence group who were female decreased compared with 1981/82, the West End audience overall audience showed a small majority of men in 1985/86. There was least change in the balance between the sexes in 1985/86 among London boroughs residents, and most change among overseas visitors. There was a particularly large swing in favour of men among Americans, with 62% being male in 1985/86, compared with 43% in 1981/82. Scandinavians, however, went against the general trend for overseas visitors in 1985/86. Only 44% of Scandinavians were male in 1985/86, with most of the increase in attendances among Scandinavians in 1985/86 when compared with 1981/82 being accounted for by women.

In 1981/82, 57% of U.K. residents aged 16 or over in the West End theatre audience were female; 53% in 1985/86. In the 1981 census, 52% of the U.K. population aged 15 or over were female.⁽⁹⁾ This meant that in 1981/82, U.K. resident women were much more likely than U.K. resident men to visit the West End theatre, whereas in 1985/86, they were only slightly more likely than men to do so. This is further evidence that there was some loss of attendances among female theatre-goers after the 1981/82 survey period.

The following table shows the area of residence

distribution of each sex. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6803 (3201)	4921 (3324)
<u>Area of residence</u>	%	%
Overseas	24 (30)	29 (41)
London boroughs	42 (41)	39 (30)
Rest U.K.	34 (29)	32 (29)

Fig 3-7 Distribution of each sex, by area of residence

Base=all respondents

The largest group of women were consistently London boroughs residents. Overseas visitors formed the smallest group of women in 1981/82, but in 1985/86 they were a slightly larger group than women from parts of the U.K. other than London. In 1981/82, men were most likely to be London boroughs residents, and had a similar area of residence profile to women, but in 1985/86, overseas visitors predominated among men.

Attendances by female London boroughs residents were stable between the two main survey periods at around 2.1 million in each case. Attendances by male London boroughs residents were lower than those by female London boroughs residents, at 1.4 million in 1981/82, and 1.6 million in

1985/86, but they did show an increase, of around 14%, between the two survey periods. Attendances by male overseas visitors showed a large increase in 1985/86, when they almost doubled on the 1981/82 figures, to 2.2 million. This made male overseas visitors the largest area of residence group by sex in 1985/86, compared with 1981/82, when they were the smallest area of residence group by sex. Attendances by female overseas visitors increased from around 1.2 million in 1981/82 to around 1.6 million in 1985/86, an increase of about 33%. Female theatre-goers from parts of the U.K. other than London were the only area of residence group by sex whose attendances decreased in 1985/86, by 12%, falling from 1.7 million in 1981/82, to 1.5 million in 1985/86. Attendances by men from parts of the U.K. other than London were around 1.2 million in 1981/82, and around 1.6 million in 1985/86, an increase of 33%.

(3) Age group

The table below shows the distribution of the West End audience by age group. The under 16's were deliberately excluded from the surveys, and a count of such exclusions indicated that around 4% of the total audience surveyed were aged under 16. The analysis of the audience by age therefore represents only those respondents aged 16 and over. Estimated attendances by each age group are given in brackets.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11732	6528
<u>Age group</u>	% (millions)	% (millions)
16 - 18	8 (0.7)	12 (1.3)
19 - 24	18 (1.5)	22 (2.3)
25 - 34	27 (2.4)	24 (2.6)
35 - 44	20 (1.8)	19 (2.0)
45 - 54	15 (1.3)	12 (1.3)
55 - 64	8 (0.7)	7 (0.7)
65 and over	4 (0.4)	4 (0.4)
Mean age (actual) ⁽¹⁰⁾	36	34

Fig 3-8 Distribution of the West End audience,
by age group

Base = all respondents

In both survey periods, the majority of the audience were aged under 35, and the 25-34's were the largest age group. In 1981/82, the 35-44's were the second largest group, and

in 1985/86, it was the 19-24's. The mean age of the audience was younger in 1985/86 than in 1981/82.

Attendances by the 16-24's increased between the two survey periods by around 1.4 million, and their increased importance in 1985/86, both as a percentage of the audience and in number of attendances accounted for, was largely the reason for the lowering of the mean age of the West End theatre-goer in 1985/86. All the 25 and over age groups, except the 65 and overs, decreased in importance as a percentage of the West End audience during 1985/86, but because of the large increase in overall attendances, none of these groups showed a decrease in actual attendances. The 25-34's and the 35-44's showed small increases in attendances in 1985/86, the former of 0.4 million, and the latter of 0.2 million when compared with 1981/82, while attendances for each of the 45 and over age groups were stable between the two survey periods.

The following table shows the age distribution of each area of residence group. 1981/82 figures are given first, 1985/86 figures follow in brackets.

Area of Residence

	<u>Overseas</u>	<u>London Boroughs</u>	<u>Rest U.K.</u>
Weighted base	3128 (2407)	4681 (2407)	3872 (1694)
<u>Age group</u>	%	%	%
16 - 18	9 (14)	5 (9)	10 (12)
19 - 24	15 (21)	23 (26)	15 (19)
25 - 34	22 (23)	33 (28)	22 (21)
35 - 44	21 (19)	16 (18)	21 (20)
45 - 54	16 (11)	11 (11)	18 (16)
55 - 64	11 (8)	8 (5)	10 (8)
65 and over	6 (4)	4 (3)	4 (4)
Mean age (actual)	38 (34)	35 (33)	37 (36)

Fig 3-9 Distribution of each area of residence group,
by age group

Base = all respondents

The overseas audience had a higher mean age than either of the U.K. resident groups in 1981/82. This may have reflected the income level, and therefore age, necessary to finance a holiday in the U.K., especially for those travelling long distances. Rates of exchange for the largest group of overseas visitors, those from the U.S.A., were much more favourable in 1985/86 than in 1981/82. The average exchange rate in 1982 was £1 to \$1.74, compared with £1 to \$1.30 in 1985, and in early 1985, the £ fell to very close to being worth \$1,⁽¹¹⁾ so that a holiday in the U.K. would have been feasible for younger U.S.A. visitors than was the case in 1981/82. There was a large increase

in the under 25's section of the overseas audience in 1985/86 when compared with 1981/82, with attendances by these age groups increasing from 0.6 million in 1981/82 to 1.4 million in 1985/86. The under 25's accounted for 24% of overseas visitors in 1981/82 and 35% in 1985/86, and the mean age of overseas visitors decreased from 38 in 1981/82 to 34 in 1985/86, becoming the same as that of all U.K. residents as a group. The age distribution of overseas visitors tended, however, to be a little more skewed towards teenagers and senior citizens than that of either group of U.K. residents.

The mean age of London boroughs residents in both survey periods was younger than that of other U.K. residents.

The following table shows the age distributions of the U.K. resident West End audience and the U.K. population compared.

	<u>U.K. adult</u>	<u>U.K. adult</u>	<u>U.K. adult</u>
	<u>Audience</u>	<u>Audience</u>	<u>Population</u>
	<u>1981/82</u>	<u>1985/86</u>	<u>1981 census</u> ⁽¹²⁾
Weighted base	8570	4116	43.7 million
<u>Age group</u>	%	%	%
16-18	7	10	(15-19) 11
19-24	20	23	(20-24) 9
25-34	28	25	18
35-44	19	20	15
45-54	14	13	14
55-64	8	6	14
65 and over	4	3	19

Fig 3-10 Age distribution of U.K. resident adult audience
and U.K. adult population compared

Base=all U.K. residents

The 55 and over age groups in the U.K. population were very under-represented among the West End audience, while the 19-34's formed a much higher percentage of the U.K. resident West End audience than of the U.K. population, the 19-24's in particular.

The following table shows the area of residence distribution of each age group.

Age group, 1981/82

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>56-64</u>	<u>65+</u>
Weighted base	926	2101	3162	2342	1754	935	460
<u>Area of</u>							
<u>residence</u>	%	%	%	%	%	%	%
Overseas	25	22	23	29	29	33	29
London boroughs	43	47	49	36	30	32	38
Rest U.K.	32	31	28	35	41	35	33

Age group, 1985/86

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>56-64</u>	<u>65+</u>
Weighted base	781	1434	1564	1240	774	455	260
<u>Area of</u>							
<u>residence</u>	%	%	%	%	%	%	%
Overseas	43	34	34	34	32	43	43
London boroughs	28	42	42	35	31	23	27
Rest of U.K.	29	24	24	31	37	33	30

Fig 3-11 Distribution of each age group, by area of residence

Base=all respondents

In 1981/82, the percentage who were from overseas tended to increase with age, although a higher percentage of the 16-18's than of the other under 35 age groups were from overseas. In 1985/86, with a large increase in attendances by young overseas visitors, the percentage of the 16-18's who were from overseas was as high as that of the 55 and over age groups, and overseas visitors formed the largest

area of residence group of the 16-18's. London boroughs residents consistently formed the largest group of the 19-34's, although the percentage of these age groups accounted for by overseas visitors increased in 1985/86. U.K. residents from outside the London boroughs were most prominent among the 35-64 age groups, and they consistently formed the largest area of residence group of the 45-54's. It is interesting to note that in 1985/86 the distribution by area of residence was almost identical for the 16-18's and 65 and overs, both groups being dominated by overseas visitors. The youngest and oldest age groups in the West End audience proved to have a number of other characteristics in common.

The following table shows the age distribution of each sex. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6801 (3200)	4920 (3314)
<u>Age group</u>	%	%
16 - 18	9 (13)	6 (11)
19 - 24	21 (24)	16 (20)
25 - 34	26 (26)	27 (22)
35 - 44	19 (19)	20 (20)
45 - 54	13 (10)	16 (14)
55 - 64	8 (5)	10 (8)
65 and over	4 (3)	5 (5)
Mean age (actual)	35 (33)	38 (36)

Fig 3-12 Distribution of each sex, by age group

Base=all respondents

Women consistently had a lower mean age than men. The under 25's consistently accounted for a higher percentage of women than of men, although in 1985/86 there was a larger increase in attendances by men under 25 when compared with 1981/82, than among women in the same age groups. Men under 25 accounted for around 0.8 million attendances in 1981/82, and around 1.7 million in 1985/86, a rise of over 113%. Women under 25 accounted for around 1.4 million attendances in 1981/82, and around 1.9 million in 1985/86, a rise of around 36% compared with 1981/82. Around half of the increase in overall West End attendances in 1985/86 was accounted for by men aged under 25.

Compared with the U.K. population at the 1981 census, female senior citizens resident in the U.K. proved to be particularly under-represented in the West End audience. At the 1981 census, women aged 65 and over accounted for 21% of the adult (15 and over) female population of the U.K., ⁽¹³⁾ but only 3% of the U.K. resident female audience in both survey periods. Men aged 65 and over accounted for 15% of the adult male population of the U.K., and 4% of the U.K. resident male audience in both survey periods, so that U.K. resident men aged 65 and over were much less under-represented among the West End audience than women were.

The following table shows the sex distribution of each age group.

	<u>Age Group, 1981/82</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>34-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	930	2110	3158	2339	1751	931	464
<u>Sex</u>	%	%	%	%	%	%	%
Female	65	63	57	56	53	54	52
Male	35	37	43	44	47	46	48

	<u>Age Group, 1985/86</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>34-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	779	1439	1564	1236	789	455	257
<u>Sex</u>	%	%	%	%	%	%	%
Female	53	52	55	47	40	39	32
Male	47	48	45	53	60	61	68

Fig 3-13 Distribution of each age group, by sex

Base=all respondents

In 1981/82, women accounted for the majority of every age group. In 1985/86, women formed a higher percentage of each of the under 35 age groups than men did, and men formed a higher percentage of all the 35 and over age groups than women did.

The percentage who were male tended to increase as age increased, with the 65 and overs having the highest percentage of men in both survey periods. Conversely, women tended to form higher percentages of the younger than of the older age groups, with the highest percentage of women found among the 16-18's in 1981/82, and the 25-34's in 1985/86. The 25-34's showed the least variation in balance between the sexes over the two survey periods. The 45 and overs showed large percentage swings in 1985/86 in favour of men, with the 65 and overs, who had shown the most even balance between the sexes in 1981/82, changing to become the group with the most disproportionate division sexes in favour of men in 1985/86.

(4) Education

18% of the West End audience in 1981/82 and 38% in 1985/86 were full-time students. Attendances by students increased from an estimated 1.6 million in 1981/82 to an estimated 4 million in 1985/86, a rise of around 150%. Attendances by non-students decreased between the two survey periods, from an estimated 7.2 million in 1981/82 to an estimated 6.6 million in 1985/86, a fall of 8%.

The following table shows the percentages of each area of residence group who were and who were not full-time students at the time of the survey. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Area of residence</u>					
	<u>Overseas</u>		<u>London</u> <u>boroughs</u>		<u>Rest U.K.</u>	
Weighted base	3138	(2402)	4625	(2404)	3823	(1715)
<u>Student</u>	%		%		%	
Yes	21	(43)	17	(35)	16	(34)
No	79	(67)	85	(65)	84	(66)

Fig 3-14 Distribution of each area of residence group,
by whether or not in full-time education

Base=all respondents

Overseas visitors were more likely than U.K. residents to be full-time students. In a number of overseas countries,

the U.S.A. in particular, tertiary level education continues to a much later age than is usual in the U.K., and this would account for the higher percentage of students among overseas visitors in spite of their higher mean age. The percentage of each of the U.K. resident groups who were full-time students was virtually identical.

The percentage of each area of residence group who were full-time students more than doubled in 1985/86. Attendances by overseas resident students increased from around 0.5 million in 1981/82, equivalent to about 6% of all West End attendances in 1981/82, to around 1.7 million in 1985/86, equivalent to about 16% of all West End attendances in 1985/86. Attendances by U.K. resident students increased from 1.1 million in 1981/82 to 2.3 million in 1985/86, the same increase in actual attendances as among overseas students. U.K. resident students accounted for 12% of West End attendances in 1981/82 and 22% in 1985/86.

The following table shows the area of residence distribution of both students and non-students. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Students</u>	<u>Non-students</u>
Weighted base	2098 (2475)	9488 (4046)
<u>Area of residence</u>	%	%
Overseas	33 (42)	26 (34)
London boroughs	37 (33)	41 (39)
Rest U.K.	30 (25)	33 (27)

Fig 3-15 Distribution of students and non-students,
by area of residence

Base = all respondents

Students were more likely to be from overseas than non-students were. In 1981/82, students were more evenly distributed between the three area of residence groups than non-students were, but in 1985/86, the area of residence distribution of non-students was more even than that of students. In 1981/82, London boroughs residents formed the largest group of both students and non-students, but in 1985/86, overseas visitors accounted for the largest group of students.

Around half of all overseas students in both survey periods were from the U.S.A.. In 1981/82, the four other most important countries as sources of overseas students were, in order of importance; Sweden, Canada, West Germany and the Netherlands. In 1985/86, there was a large increase in attendances by Canadian students, from around 30,000, or 6% of all attendances by overseas students in 1981/82, to around 290,000, or 17% of all attendances by overseas

students in 1985/86. Japanese students were another group who increased markedly in importance in 1985/86. In 1981/82, they accounted for around only 5,000 or 1% of attendances by overseas students in 1981/82, rising to 85,000 or 5% of all attendances by overseas students in 1985/86. The four most important countries as sources of overseas students in 1985/86 were, in order of importance after the U.S.A.; Canada, Japan, France and Australia. European students accounted for a smaller percentage of the overseas student audience in 1985/86 than they did in 1981/82.

Compared with non-student overseas visitors, overseas students were less likely to be making a repeat trip to London within a 12 month period. 13% of overseas students compared with 23% of non-students were on a repeat visit. Both students and non-students from overseas were equally likely, however, to say that London's theatres were a very important attraction of the capital. 28% of both groups said this was the case.

The following table shows the percentage of each sex who were and who were not full-time students at the time of the survey. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6722 (3199)	4810 (3318)
<u>Student</u>	%	%
Yes	19 (32)	16 (43)
No	81 (68)	84 (57)

Fig 3-16 Distribution of each sex, by whether or not in full-time education

Base = all respondents

In 1981/82, a slightly higher percentage of women than of men were students, but in 1985/86, the percentage of men who were students was higher than that of women. Attendances by female students increased from around 1 million in 1981/82 to around 1.7 million in 1985/86, but the increase for male students was much greater, from around 0.6 million in 1981/82 to around 2.3 million in 1985/86.

The following table shows the sex distribution of students and non-students. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Students</u>	<u>Non-students</u>
Weighted base	2081 (2468)	9451 (4049)
<u>Sex</u>	%	%
Female	62 (42)	57 (53)
Male	38 (58)	43 (47)

Fig 3-17 Distribution of students and non-students, by sex

Base = all respondents

Women accounted for the majority of students in 1981/82, men in 1985/86. Women accounted for the majority of non-students in both survey periods, even though they were outnumbered by men in the audience overall in 1985/86.

The following table shows the percentage of each age group who were and who were not full-time students.

Age Group, 1981/82

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	932	2108	3160	2342	1755	932	460
<u>Student</u>	%	%	%	%	%	%	%
Yes	93	42	6	3	2	2	*
No	7	58	94	97	98	99	99

Age group, 1985/86

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	774	1424	1562	1239	780	452	259
<u>Student</u>	%	%	%	%	%	%	%
Yes	78	52	25	28	25	23	36
No	21	48	75	72	75	77	64

Fig 3-18 Distribution of each age group, by whether or not
in full-time education

*=less than 0.5%

Base = all respondents

In 1981/82, the percentage who were full-time students was, as might be expected, very high among the 16-18's, falling off to less than half among the 19-24's, and thereafter decreasing sharply as age increased, with less than 5% of any of the 35 and over age groups being full-time students. There was a surprising change in 1985/86, however, with a lower percentage of the 16-18's being in full-time education than in 1981/82, and a very large increase in the percentages of the 25 and over age groups who were full-time students, especially among the 65 and overs. There

was evidently a major shift in 1985/86 towards a high percentage of students being post-graduate and mature students.

The following table shows the age distributions of students and non-students. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Students</u>		<u>Non-students</u>	
Weighted base	2083	(2449)	9606	(4042)
<u>Age group</u>	%		%	
16 - 18	40	(25)	1	(4)
19 - 24	44	(30)	13	(17)
25 - 34	10	(16)	31	(29)
35 - 44	4	(14)	24	(22)
45 - 54	1	(8)	17	(14)
55 - 64	*	(4)	10	(9)
65 and over	*	(3)	4	(5)
Mean age (actual)	21	(28)	39	(38)

Fig 3-19 Distribution of students and non-students, by age group

*=less than 0.5%

Base=all respondents

Although in both survey periods the majority of students were aged under 25, the percentage who were was much lower in 1985/86, when the mean age of the student audience showed a substantial increase. The age distribution of

students in both survey periods suggested that students of the usual U.K. undergraduate and postgraduate ages were a much more important section of the student audience than were senior school pupils, especially in 1985/86. Although the mean age of students increased in 1985/86, it remained younger than that of the non-student audience.

In 1981/82, 14% of all students actually attended school, college or university in the central London area. In 1985/86, the figure was 13%, but this represented an increase in attendances by students attending educational institutions in central London from around 196,000 in 1981/82, to around 520,000 in 1985/86. The study holiday in London, however, decreased in importance among overseas students in 1985/86. In 1981/82, 12% of overseas students specified that they were in London on a study holiday, compared with only 2% in 1985/86. This represents a fall in attendances by this group from around 60,000 in 1981/82 to around only 34,000 in 1985/86.

In 1981/82, a question was included on the age at which non-students had completed their full-time education. 14% of non-students had completed their education at age 16 or under, 22% at age 17 or 18, 49% between the ages of 19 and 24, and 15% at age 25 or over. This means that a large percentage of the West End audience are likely to have been graduates.

The following table shows the final education levels of non-students for each area of residence group.

<u>Area of residence</u>			
	<u>London</u>		
	<u>Overseas</u>	<u>boroughs</u>	<u>Rest U.K.</u>
Weighted base	2463	3871	3201
<u>Age completed</u>			
<u>education</u>	%	%	%
16 or under	5	13	24
17 or 18	12	22	28
19 to 24	56	53	40
25 or over	27	12	8

Fig 3-20 Distribution of each area of residence group, by final education level

Base = all those not in full-time education.

There were marked differences between each area of residence group, with a much higher percentage of overseas visitors than of either group of U.K. residents having completed their full-time education at age 19 or over. 83% of overseas visitors, and 57% of all U.K. residents, had been educated full-time to age 19 or over. This may have reflected different patterns of tertiary education in the U.K. and overseas. London boroughs residents were more likely than other U.K. residents to have received full-time education to the usual U.K. tertiary level education age of 19 or over, and the rest U.K. group were the most likely

of the three to have completed their education at age 16 or under.

The following table shows the final education levels of non-students for each sex.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	5442	4094
<u>Age completed</u>		
<u>education</u>	%	%
16 or under	16	13
17 or 18	26	17
19 to 24	47	51
25 or over	11	19

Fig 3-21 Distribution of each sex, by final education level

Base = all those not in full-time education

Men were more likely than women to have been educated full-time to age 19 or over, and less likely to have left school at age 16 or under.

The following table shows the final education levels of non-students for each age group.

	<u>Age Group</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	63	1206	2964	2272	1708	921	457
<u>Age completed</u>							
<u>education</u>	%	%	%	%	%	%	%
16 or under	36	10	9	15	18	22	22
17 or 18	64	32	17	22	21	21	21
19 to 24	-	58	60	44	43	36	38
25 or over	-	-	14	19	18	21	19

Fig 3-22 Distribution of each age group, by final education level

Base = all those not in full-time education

Non-students among the 16-18's were more likely to have stayed at school until 17 or 18 than to have left school at 16 (the minimum legal age for leaving school for those U.K. resident theatre-goers who were aged 16-18 in 1981/82). The percentage who had left school at age 16 or under was highest among the 16-18's, but in fact only a small percentage of the 16-18's were not currently in full-time education. Those aged 19-34 were much more likely than the older age groups to have been educated full-time to between the ages of 19 and 24, and were therefore probably the most likely age groups to contain a high percentage of graduates. The higher percentage of the 35 and over age groups than of the 19-34 age groups who had left school at age 16 or under would probably have been a reflection of relatively poorer higher education opportunities in the

teenage years of member of the audience in the oldest age groups.

Notes to Chapter 3

(1) For tables giving percentages of unweighted base figures, as was the case in Chapter 2, an indication of the error associated with sampling could be obtained by calculating the square root of the number of respondents giving each reply, and expressing the result as a percentage of the base figure. Where percentages are derived from weighted bases, as in tables in this and in succeeding chapters, the errors associated with sampling will have increased or decreased according to whether the weighting factor applied to relevant category of production results when calculating the weighted average figures was greater or less than 1, respectively. Where the weighting factor was greater than 1, the error will have been multiplied by the square root of the weighting factor. As no set of category of production results was multiplied in either survey period by a weighting factor of more than 4, and as most of the weighting factors applied were very close to 1, the effect of weighting the aggregated results must have been to multiply the original error associated with sampling by substantially less than 2. This means that throughout the tables in this study, the error associated with sampling is thought to be very small, especially when the base figures are large. However, percentage figures given in columns with small weighted base figures should be treated with caution.

The above note applies to all tables in this study

which present results derived from weighted base figures.

- (2) See notes (23) and (24) in Chapter 1, for an account of the method used to calculate total West End attendances for each survey period. Estimated attendances accounted for by each category were calculated by multiplying the total attendances for each survey period by the weighted percentage of the audience accounted for by the relevant category. Attendance figures throughout this study are given to the nearest 100,000, except in cases where small numbers of attendances are being compared, in which cases, figures are generally given to the nearest 10,000.

- (3) For example, the Wyndhams' Theatre Group research, quoted by Bernard Levin, in The Sickness at the Heart of London's Theatre, *Sunday Times*, January 29, 1978, estimated the overseas percentage of the audience at 45% in 1976. This article is reproduced in Appendix 1.

- (4) Figures for overseas visitors to the U.K. were obtained from Business Monitor, MQ6 - Overseas Tourism, a quarterly publication of HMSO, Government Statistical Service. The 1981 calendar year's figures were used for comparison with the 1981/82 survey results, and the figures for the period from the beginning of May 1985 to the end of April 1986 for comparison with the 1985/86 survey results. Figures used were not seasonally adjusted, and provisional estimates only were available for 1986 at the time of writing.
- (5) See note (4) Chapter 2 for details of the method used to calculate mean frequency of theatre-going.
- (6) Source of figures on overseas visitors to London was the International Passenger Survey, results of which are published quarterly by the Department of Employment.
- (7) Gardiner, Caroline West End theatre attendances, unpublished annual research report for SWET, from 1981.
- (8) There was occasionally some overlap for particular towns between home counties areas and London boroughs; for example, Bromley is in Kent but also in the London borough of Bromley. When a town fell within a London borough it was included as part of the London boroughs, not as part of the rest of the U.K.

(9) Census data was obtained from the Annual Abstract of Statistics, 1986 edition, published by HMSO, Government Statistical Service.

(10) See note (3) Chapter 2 for details of method used to calculate mean age.

(11) Exchange rate figures were obtained from Economic Trends, published annually by HMSO, Government Statistical Service.

(12) Note that the categories for the U.K. census data are not invariably precisely equivalent to those for theatre audiences. The nearest equivalent categories were used in each case, and are stated in the table, where relevant. The under 16's were excluded from the calculation of percentages of the audience, and the under 15's from the calculation of percentages of the U.K. population.

(13) See note (9).

CHAPTER 4 FREQUENCY OF THEATRE GOING AMONG THE WEST END AUDIENCE

(1) Frequency of visiting London theatres

The following table shows the results of the question on frequency of London theatre-going in the 12 month period prior to the survey, and including the performance surveyed. A fixed period of time for the measurement of London theatre-going frequency was chosen for this question as it was felt it would be easier for respondents to recall their theatre visits over that period than to estimate their "typical" frequency of London theatre-going. The total number of attendances each frequency group was estimated as representing are given in brackets. For the 1985/86 surveys, the highest frequency band was given a further subdivision, in order to investigate whether there were any differences between those making between 12 and 20 other visits and those making 21 or more other visits.

Note that throughout this study the mean number of visits to London theatres is calculated to include the performance surveyed, and relates to the 12 month period preceding that performance.

	<u>1981/82</u>		<u>1985/6</u>	
Weighted base	11703		6521	
<u>Visits in previous</u>				
<u>12 months</u>	%	(millions)	%	(millions)
This is first visit	22	(1.9)	31	(3.3)
1 other	12	(1.1)	14	(1.5)
2 others	12	(1.1)	13	(1.4)
3 - 6 others	27	(2.4)	23	(2.4)
7 - 11 others	12	(1.1)	10	(1.1)
12 or more others	15	(1.3)	12-20 others	6 (0.6)
			21 + others	3 (0.3)
Mean frequency				
(actual) ⁽¹⁾	3		2	

Fig 4-1 Distribution of the West End audience, by
frequency of London theatre-going

Base= all respondents

In 1981/82, the 3-6 other visits category of theatre-goer accounted for the highest number of attendances. In 1985/86, attendances by those who were making their first visit to a London theatre in 12 months increased by 1.4 million, making them the largest frequency group, while the number of attendances by the other frequency groups showed only small changes compared with 1981/82. There was a consequent decrease in the mean frequency of London theatre-going by the West End audience overall from 3 visits in 1981/82 to 2 visits in 1985/86. Attendances by those groups making 1 and 2 visits other than the performance surveyed increased by around 0.4 and 0.3

million attendances respectively in 1985/86. Those making 12 or more other visits in the previous 12 months were the only frequency group whose attendances declined in 1985/86, by 0.4 million. When this group was further sub-divided in 1985/86, about twice as many attendances were accounted for by those making 12-20 other visits as by those making 21 or more.

The probable explanation for the increased importance of the first visit in 12 months category in 1985/86 was the large increase in the number of overseas visitors in the West End audience during this survey period. Many overseas visitors would not have had an opportunity to visit the London theatre on other occasions in the previous 12 months.

When total attendances in each survey period were divided by the mean frequency of London theatre-going of the West End audience overall to give an indication of the number of individuals who attended the London theatre, it was estimated that 3.4 million people during the 1981/82 survey period, and 5.0 million people during the 1985/86 survey period attended the London theatre.⁽²⁾

Since the surveys measured attendances, an estimate of the percentage of individuals attending the London theatre who fell into each frequency group could be obtained by weighting the results on frequency of theatre-going with

weights inversely proportional to the mid-point of each frequency group.⁽³⁾ The following table shows the percentage of attendances and of individuals attending the London theatre who were accounted for by each frequency group. The frequency groups are divided into four categories of theatre-goer - new visitors, occasionals (1 or 2 other visits), frequent (3 to 11 other visits) and regulars (12 or more other visits).

	<u>1981/82</u>		<u>1985/86</u>	
Weighted base	11703		6521	
<u>Frequency</u>				
<u>group</u>	attendances	people	attendances	people
	%	%	%	%
New visitors	22	55	31	64
Occasionals	24	26	27	24
Frequent	39	16	33	11
Regulars	15	3	9	1

Fig 4-2 Percentage of attendances and percentage of theatre-goers accounted for by each frequency group of London theatre-going
Base=all respondents

The new visitors category accounted for the largest number of people in both survey periods. The regulars category accounted for a very small percentage of people, especially in 1985/86, when attendances by this group declined. Regular theatre-goers were estimated to account for only

around 95,000 people in 1981/82 and around 50,000 in 1985/86. The group making 21 or more other visits to London theatres in 1985/86 consisted of only about 8,000 people, but they accounted for around 300,000 attendances.

Between 1981/82 and 1985/86, there was an evident broadening of the base of the West End audience, so that more people attended the West End theatre in 1985/86 than in 1981/82, but each went to the theatre fewer times on average. If the individual West End theatre-goer was going to fewer performances on average in 1985/86 than in 1981/82, it would be reasonable to assume that the individual theatre-goer would concentrate on the best-known productions in 1985/86, and would be less willing to choose a new production they knew little or nothing about than they would have been in 1981/82. This would result in an increased concentration of attendances on the most popular and established productions, while new productions, which are likely to be particularly reliant on an audience who are willing to sample a wide range of productions, would be less well patronised than when fewer people went to the theatre more frequently. The box-office sales section of the research provided evidence to support this theory. During the 1985/86 survey period, average percentages of available capacity filled were on the whole more variable between categories of production than in 1981/82, indicating that the available audience was less evenly distributed between productions in 1985/86. For example, for new plays, 50% of available capacity was filled during

the nearest calendar year to the 1981/82 survey period compared with 59% of total available West End capacity. When the percentage of available West End capacity filled increased to 64% for the nearest calendar year to the 1985/86 survey period, the percentage of available new play capacity filled was only 51%.⁽⁴⁾ Evidently the more broadly-based, less frequent London theatre-going audience in 1985/86 was less willing to be adventurous in their theatre-going than that which contained a larger number of regular theatre-goers, and the improved level of attendances in 1985/86 was not evenly distributed between the different categories of production.

A large percentage increase in the numbers of new visitor theatre-goers would be necessary to produce a significant impact on West End attendances, whereas the loss of only a small percentage of the regular theatre-goers, or a decrease in their frequency of theatre-going, would have a substantial effect, particularly on those categories of production with a core audience of regular theatre-goers, since regular theatre-goers account for many more attendances per person than new visitors.

The following table shows the distribution of frequency of London theatre-going for each area of residence group.¹ 1981/82 figures are given first, 1985/86 figures follow in brackets.

Area of Residence

	<u>London</u>					
	<u>Overseas</u>		<u>boroughs</u>		<u>Rest U.K.</u>	
Weighted base	3126 (2403)		4672 (2405)		3871 (1695)	
<u>Visits in previous</u>						
<u>12 months</u>	%		%		%	
This is first visit	40	(50)	6	(13)	26	(31)
1 other	18	(16)	6	(10)	16	(18)
2 others	12	(12)	8	(13)	16	(13)
3 - 6 others	19	(16)	32	(30)	25	(25)
7 - 11 others	6	(3)	21	(17)	9	(6)
12 or more others	5	(3)	27	(17)	8	(7)
Mean frequency						
(actual)	2	(1)	5	(4)	2	(2)

Fig 4-3 Distribution of each area of residence group, by frequency of London theatre-going

Base = all respondents

The first visit category accounted for the largest frequency group of both overseas and U.K. resident visitors to London in both survey periods. The majority of both groups fell into the 2 other visits or less categories. The largest group of London boroughs residents was consistently the 3-6 other visits category, and the majority of London boroughs residents fell into the 3 or more other visits categories. London boroughs residents had the highest mean frequency of London theatre-going, and regular access to London theatres would obviously be much easier for them

than it would be for the other two area of residence groups. Only a small percentage of London boroughs residents were making their first visit in 12 months to a London theatre, although their numbers did increase by around 0.3 million in 1985/86.

Distribution of London theatre-going frequency among the rest U.K. group showed little change over the two survey periods, unlike that of overseas and London boroughs residents, which both showed a substantial decline in 1985/86. For London boroughs residents there was a particularly large decrease in the percentage who had made 12 or more other visits in 1985/86.

The following table shows the area of residence distribution of each of the four frequency groups which were defined in fig 4-2. 1981/82 figures are given first, 1985/86 figures follow in brackets.

Frequency group (London theatre-going)

<u>New</u>				
	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2566(2020)	2806(1759)	4551(2150)	1746(575)
<u>Area of</u>				
<u>residence</u>	%	%	%	%
Overseas	46 (57)	33 (37)	19 (21)	7 (11)
London	12 (14)	22 (31)	55 (52)	76 (67)
boroughs				
Rest U.K.	42 (29)	45 (32)	26 (27)	17 (22)

Fig 4-4 Distribution of each frequency group, by area of residence

Base=all respondents

The percentage who were overseas visitors decreased as frequency of theatre-going increased; the reverse was true of the percentage who were London boroughs residents.

Overseas visitors consistently formed the largest area of residence group among new visitors. The occasional theatre-goers group was the most evenly distributed of the four by area of residence, especially in 1985/86. London boroughs residents accounted for just over half of the frequent theatre-goers group, and this frequency group showed little change in area of residence distribution over the two survey periods. The regular theatre-goers group was dominated by London boroughs residents in both survey periods, though less so in 1985/86. Those who had made 21

or more other visits were less likely than those who had made 12 to 20 other visits to be from overseas. Only about 700 overseas visitors were estimated to have made 21 or more other visits in the 1985/86 survey period. The only overseas respondents found in this category of theatre-going frequency in 1985/86 were from the U.S.A., Canada, Israel and Italy.

The major increase in attendances by new visitors in 1985/86 was among overseas visitors. Attendances by new visitors from overseas increased from 0.9 million in 1981/82 to 1.9 million in 1985/86. Attendances by those London boroughs residents who were new visitors increased from 0.2 to 0.5 million, while attendances by other U.K. residents who were new visitors showed a smaller increase, from 0.8 to 0.9 million. In the occasional theatre-goers category, attendances by overseas visitors increased from around 0.7 million in 1981/82, to around 1.1 million in 1985/86, and by London boroughs residents from 0.5 to 0.9 million, while attendances by other U.K. residents showed a small decrease from 1.0 to 0.9 million. There was very little change among the frequent theatre-goers group. Attendances by each area of residence group in this category were more or less stable over the two survey periods, at around 0.7 million by overseas visitors, 1.9 million by London boroughs residents and 0.9 million by the rest U.K. group. Among regular theatre-goers, attendances by overseas visitors were fairly stable at around 0.1 million in both survey periods. 75% of those overseas

visitors who were regular theatre-goers in 1985/86 said that London's theatres were a very important factor in persuading them to come to London, and 65% said that they had made at least one other visit to London in the previous 12 months. Both figures were almost double the percentage for overseas visitors in any of the other frequency groups, and it is likely that a strong interest in theatre was largely responsible for the repeat visits to London by this group. Attendances by regular theatre-goers who were London boroughs residents decreased from around 1.0 million in 1981/82 to around 0.6 million in 1985/86, while attendances by other U.K. residents in this frequency group were fairly stable, at around 0.2 million.

The major growth section of the West End audience in 1985/86 was therefore among the new visitors category, especially among overseas residents, although there was a small increase in attendances by London boroughs residents who were new visitors. The largest decline was among those London boroughs residents who were regular theatre-goers. There was also a small decrease in attendances among occasional theatre-goers from other parts of the U.K. Attendances by the frequent theatre-goers' group were the most stable between the two survey periods.

The overall picture of the London theatre-going frequency of the West End audience which emerged from the fore-going analysis was one of a large section of new visitors, the majority of whom were tourists, with overseas tourists

predominating; a core audience of occasional and frequent theatre-goers, who accounted for the majority of attendances, and who were less likely than either new visitors or regular theatre-goers to be dominated by a particular area of residence group; and a small group of regular theatre-goers, among whom London boroughs residents predominated.

The following table shows the distribution of frequency of London theatre-going for each sex. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6794 (3194)	4908 (3320)
<u>Visits in previous</u>		
<u>12 months</u>	%	%
This is first visit	21 (29)	23 (33)
1 other	12 (13)	14 (15)
2 others	12 (15)	12 (10)
3 - 6 others	27 (25)	24 (22)
7-11 others	13 (10)	12 (10)
12 or more others	15 (8)	15 (10)
Mean frequency		
(actual)	3 (2)	3 (2)

Fig 4-5 Distribution of each sex, by frequency of London theatre-going

Base = all respondents

The differences in theatre-going frequency between the two sexes were not major. Women were a little less likely than men to be making their first visit in 12 months. In 1985/86 the percentage of women who had made 12 or more other visits to London theatres in the past 12 months fell from 15% of women to 8%, while the percentage of men in this category fell from 15% in 1981/82 to 10% in 1985/86. About three-quarters of the decrease in attendances by regular theatre-goers in 1985/86 was accounted for by women.

The following table shows the sex distribution of each of the four frequency groups which were defined in fig 4-2. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Frequency group (London theatre-going)</u>				
	<u>New</u>			
	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2576(2020)	2808(1760)	4562(2150)	1756(584)
<u>Sex</u>	%	%	%	%
Female	56 (45)	57 (52)	60 (51)	57 (46)
Male	44 (55)	43 (48)	40 (49)	43 (54)

Fig 4-6 Distribution of each frequency group, by sex

Base = all respondents

In both survey periods, men formed a higher percentage of

the new visitors than of the other frequency groups. In 1981/82, women formed a higher percentage of frequent theatre-goers, and in 1985/86 of the occasionals, than of any other frequency group. In both survey periods, women accounted for the majority of the occasional and frequent theatre-goers, even though the overall West End balance between the sexes changed from a predominantly female audience in 1981/82 to a slight bias in favour of men in 1985/86. Men accounted for the majority of both the new visitors and regulars categories in 1985/86. A higher percentage of the 21 or more other visits category than of the 12 to 20 other visits category were male.

Attendances by male new visitors increased from around 0.8 million in 1981/82 to around 1.8 million in 1985/86. Attendances by female new visitors increased by a much smaller amount, from around 1.1 to around 1.5 million. Attendances by regular female theatre-goers decreased from around 0.7 to around 0.4 million, compared with the much smaller decrease in attendances by male regular theatre-goers, from around 0.6 to around 0.5 million.

The following table shows the distribution of frequency of London theatre going by age group.

Age Group, 1981/82

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	934	2111	3161	2342	1751	931	466
<u>Visits in previous</u>							
<u>12 months</u>	%	%	%	%	%	%	%
This is first visit	30	19	21	24	19	23	24
1 other	16	11	11	15	14	10	12
2 others	14	11	10	11	12	11	12
3 - 6 others	25	27	28	24	28	27	23
7 - 11 others	8	16	13	13	12	12	12
12 or more others	7	16	17	13	15	17	17
Mean frequency							
(actual)	2	3	3	2	3	3	2

Age Group, 1985/86

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	780	1431	1560	1236	777	455	260
<u>Visits in previous</u>							
<u>12 months</u>	%	%	%	%	%	%	%
This is first visit	43	30	30	26	28	32	31
1 other	13	21	12	13	14	10	14
2 others	15	11	16	13	10	10	12
3 - 6 others	20	23	21	27	25	23	25
7 - 11 others	5	8	11	11	12	9	6
12 or more others	4	7	10	10	11	16	12
Mean frequency							
(actual)	2	2	2	2	2	2	2

Fig 4-7 Distribution of each age group, by frequency of
London theatre-going

Base = all respondents

The 16-18's were the most likely age group to be making their first visit in 12 months to a London theatre, in both survey periods. The 55-64's were the most likely age group to have made 12 or more other visits in 1985/86, and tied for the highest percentage of regulars in 1981/82 with the 25-34 and 65 and over age groups. The 16-18's and 19-24's showed the greatest change in frequency distribution over the two survey periods. Both these groups had particularly large increases in the percentage who were from overseas in 1985/86.

The following table shows the age distribution of each of the four frequency groups of London theatre-going which were defined in Fig 4-2. 1981/82 figures are given first, 1985/86 figures follow in brackets.

periods the most important age group in terms of number of attendances accounted for). Regular theatre-goers had the oldest mean age of any of the frequency groups, and were the only age group to have a higher mean age in 1985/86 than in 1981/82. This indicates that of the decrease in attendances by regulars in 1985/86, a larger part of the decrease was among the younger age-groups than among the older. The percentage of attendances by regulars which were accounted for by the under 35's fell from 53% in 1981/82 to 48% in 1985/86. Attendances by regular theatre-goers aged under 35 fell from around 690,000 in 1981/92 to around 430,000 in 1985/86, and those by regular theatre-goers aged 35 and over fell from around 610,000 to around 470,000.

In general, the more frequent the theatre-goer, the older they were likely to be. The mean age of those making 21 or more other visits in 1985/86 was 40, compared with 38 for those making 12-20 other visits. The high mean age of the most frequent theatre-goers is likely to have been because disposable income was greatest among the middle-aged groups, especially for those whose children have left home.

(2) Frequency of theatre-going outside London

The 1981/82 surveys included a question on frequency of theatre-going outside London. This was designed to discover whether a low frequency of theatre-going to London theatres was due primarily to a lack of regular access to London theatres, or to a low level of interest in theatre generally.

The following table shows the 1981/82 findings on theatre-going outside London. The figures for London theatre-going in that survey period are also given for purposes of comparison. Note that for London theatres the number of visits given in this table only excludes the performance surveyed.

	<u>Theatre-going frequency</u>	
	<u>Outside London</u>	<u>In London</u>
Weighted base	11696	11703
<u>Visits in previous</u>		
<u>12 months</u>	%	%
None	41	22
1	15	12
2	13	12
3 - 6	20	27
7 - 11	6	12
12 or more	5	15

Fig 4-9 Distribution of the West End audience by frequency of theatre-going outside and in London, 1981/82

Base = all respondents

Theatre-going outside London among respondents was less frequent than theatre-going in London. Almost twice as high a percentage of the audience had made no visits at all to theatres outside London in the previous 12 months as had made no visits to theatres in London apart from the performance surveyed.

The following table shows the distribution of the four frequency groups of theatre-going outside London which correspond to those frequency groups defined of London theatre-going in section 1 of this chapter, by their frequency of London theatre-going.

<u>Visits to theatres outside</u>				
<u>London in previous 12 months</u>				
	<u>None</u>	<u>1-2</u>	<u>3-11</u>	<u>12+</u>
Weighted base	4787	3259	3029	581
<u>Visits to London theatres</u>				
<u>in previous 12 months</u>	%	%	%	%
This is first visit	23	20	24	16
1 other	12	11	14	11
2 others	12	13	10	8
3 - 6 others	28	27	25	21
7 - 11 others	13	14	10	14
12 or more others	12	15	17	30
Mean frequency				
(actual)	2	3	3	3

Fig 4-10 Distribution of each frequency group of
theatre-going outside London, by frequency
of London theatre-going, 1981/82
 Base = all respondents

Those who were the most frequent visitors to theatres outside London were also the most frequent visitors to theatres in London. Those who had made 12 or more visits to theatres outside London in the previous 12 months contained the lowest percentage who were making their first visit in 12 months to a London theatre. The lowest mean frequency of London theatre-going was found among those who had not visited any theatres outside London in the previous 12 months. These findings suggest that a high frequency of

London theatre going was related to an interest in theatre generally, while a low frequency of London theatre-going was more likely to be indicative of a low level of interest in theatre generally than of a lack of regular access to London theatres. The possibility that some theatre-goers who did not live in London might not have regular access to any theatres at all should not, however, be ruled out.

The following table shows the distribution of frequency of theatre-going outside London for each of the four frequency groups of theatre-going in London which were defined in the section 1 of this chapter.

<u>Frequency group (London theatre-going)</u>				
<u>New</u>				
	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2569	2791	4545	1751
<u>Visits to theatres</u>				
<u>outside London in</u>				
<u>previous 12 months</u>	%	%	%	%
None	42	41	42	33
1	13	16	16	13
2	13	12	14	14
3 - 6	22	22	19	22
7 - 11	6	5	5	8
12 or more	4	4	4	10

Fig 4-11 Distribution of each frequency group of London
theatre-going, by frequency of theatre-going
outside London, 1981/82

Base=all respondents

The figures in this table confirm the previous analysis, in showing that those who were regular London theatre-goers were the most likely frequency group to have visited theatres outside London in the previous 12 months.

In 1981/82, only 8% of the overall West End audience had not been to any theatres at all, apart from the performance surveyed, in the previous 12 months. 39% of them were from overseas, 19% from London boroughs and 42% from parts of the U.K. other than London. Overseas visitors were the

most likely of the three area of residence groups to fall into this category - 12% of them did so - and those from parts of the world other than North America and Western Europe were particularly likely not to have visited any other theatres at all in the previous 12 months. Men were more likely than women not to have visited any other theatres. Those who had made no theatre visits at all in the previous 12 months, apart from the performance surveyed, were slightly less highly-educated than those who had made other theatre visits; 52% of non-students in the former category had been educated to age 19 or over in 1981/82, compared with 57% of those in the latter.

The following table shows the distribution of each area of residence group by their frequency of theatre-going outside London.

<u>Area of Residence</u>			
	<u>London</u>		
	<u>Overseas</u>	<u>Boroughs</u>	<u>Rest U.K.</u>
Weighted base	3167	4669	3828
<u>Visits to theatres</u>			
<u>outside London in</u>			
<u>previous 12 months</u>			
	%	%	%
None	35	51	35
1	10	18	15
2	11	12	16
3 - 6	26	14	23
7 - 11	9	3	6
12 or more	9	2	5

Fig 4-12 Distribution of each area of residence group,
by frequency of theatre-going outside London,
1981/82

Base=all respondents

Not surprisingly, London boroughs residents were the most likely area of residence group to have concentrated their theatre-going on London theatres. Overseas visitors were more likely than the rest U.K. group to have visited theatres outside London.

The following table shows the distribution of each of the frequency groups of theatre-going outside London as defined in Fig 4-10, by area of residence.

Visits to theatres outside London
in previous 12 months

	<u>None</u>	<u>1-2</u>	<u>3-11</u>	<u>12+</u>
Weighted base	4790	3263	3030	581
<u>Area of residence</u>	%	%	%	%
Overseas	21	20	38	50
London boroughs	50	43	26	19
Rest U.K.	29	37	36	31

Fig 4-13 Distribution of each frequency group of
theatre-going outside London, by area of
residence, 1981/82

Base=all respondents

London boroughs residents accounted for 50% of all those who had not visited any theatres outside London in the past 12 months, and the percentage who were London boroughs residents decreased as frequency of theatre-going outside London increased. Overseas visitors accounted for 50% of those who had made 12 or more visits to theatres outside London in the past 12 months. The rest U.K. group accounted for higher percentages of the 1-2 and 3-11 visits categories than of the no visits and the 12 or more visits categories, indicating that they were likely to be moderately frequent visitors to theatres outside London.

The following two tables show the frequency of theatre-going outside London for each sex, and the sex distribution of each of the four frequency groups of theatre-going

outside London as defined in Fig 4-10.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6750	4874
<u>Visits to theatres</u>		
<u>outside London in</u>		
<u>previous 12 months</u>		
	<u>%</u>	<u>%</u>
None	41	40
1	15	15
2	13	13
3 - 6	21	20
7 - 11	6	6
12 or more	4	6

Fig 4-14 Distribution of each sex, by frequency of
theatre-going outside London, 1981/82

Base = all respondents

	<u>Visits to theatres outside London in</u> <u>previous 12 months</u>			
	<u>None</u>	<u>1-2</u>	<u>3-11</u>	<u>12+</u>
Weighted base	4777	3252	3020	575
<u>Sex</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Female	59	58	58	51
Male	41	42	42	49

Fig 4-15 Distribution of each frequency group of theatre-
going outside London, by sex, 1981/82

Base = all respondents

Men were more likely than women to have made 12 or more visits to theatres outside London in the previous 12 months. Their higher frequency of theatre-going outside London was confirmed by the fact that although they accounted for only 42% of the overall audience, they accounted for 49% of those making 12 or more visits to theatres outside London in the previous 12 months.

The following table shows the distribution of frequency of theatre-going outside London for each age group.

	<u>Age Group</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	929	2107	3154	2324	1732	919	456
<u>Visits to theatres</u>							
<u>outside London in</u>							
<u>previous 12 months</u>	%	%	%	%	%	%	%
None	38	39	47	40	34	36	42
1	18	16	16	14	13	12	10
2	15	15	11	13	14	13	14
3 - 6	19	20	17	23	24	25	24
7 - 11	6	5	5	6	8	7	4
12 or more	4	5	4	4	7	7	6

Fig 4-16 Distribution of each age group, by frequency of theatre-going outside London, 1981/82

Base = all respondents

The 45-54's were the most likely age group to have attended theatres outside London in the previous 12 months, and they contained the highest percentage of any age group who had made more than 6 visits to theatres outside London in the past 12 months. The 25-34's were the least likely to have attended any theatres outside London in the past 12 months; this age group were among the most frequent London theatre-goers.

The following table shows the age distribution of each of the four frequency groups of theatre-going outside London as defined in Fig 4-10.

<u>Visits to theatres outside London</u> <u>in previous 12 months</u>				
	<u>None</u>	<u>1-2</u>	<u>3-11</u>	<u>12+</u>
Weighted base	4786	3254	3001	580
<u>Age group</u>	%	%	%	%
16 - 18	7	9	7	5
19 - 24	18	21	17	18
25 - 34	31	25	23	21
35 - 44	19	19	21	17
45 - 54	13	14	17	21
55 - 64	8	8	11	13
65 and over	4	4	4	5
Mean age (actual)	36	35	38	39

Fig 4-17 Distribution of each frequency group of theatre-going outside London, by age group, 1981/82

Base = all respondents

The oldest mean age was found among those who were the most frequent visitors to theatres outside London, as was the lowest percentage of under 25's. The same was true of theatre-going in London, indicating that age is an important factor in determining frequency of theatre-going generally.

Notes to Chapter 4

- (1) See note (4) Chapter 2, for details of the method used to calculate mean frequency of theatre-going.
- (2) Based on 8.8 million attendances and a mean frequency of London theatre-going of 2.6 visits during the 1981/82 survey period and 10.6 million attendances and a mean frequency of 2.1 visits during the 1985/86 survey period. See notes (23) and (24) Chapter 1, for details of the method used to calculate total attendances during each survey period.
- (3) The mid-point of the highest category was taken as being the lower point of that category, plus half the difference between the lower and upper points of the previous category.
- (4) Gardiner, Caroline, West End theatre attendances, unpublished annual research report for SWET, from 1981.
- (5) See note (3) Chapter 2, for details of method used to calculate mean age.

CHAPTER 5 ASPECTS OF THE WEST END THEATRE VISIT

(1) Reason in central London on the day of performance

The table below shows the distribution of the main reasons why respondents were in the central London area on the day of the performance surveyed. Estimated attendances that each category of theatre-goer accounted for follow in brackets.

	<u>1981/82</u>	<u>1985/6</u>
Weighted base	11701	6517
<u>Reason in c. London</u>	% (millions)	% (millions)
Work/college etc	23 (2.0)	18 (1.9)
Live centrally	11 (1.0)	9 (0.9)
On holiday	22 (1.9)	33 (3.5)
For theatre visit	38 (3.3)	36 (3.8)
Study holiday	1 (0.1)	1 (0.1)
Shopping trip	3 (0.3)	2 (0.2)
Other reasons	2 (0.2)	1 (0.2)

Fig 5-1 Distribution of the West End audience by main reason in central London on the day of performance

Base = all respondents

Although a special trip to see the production surveyed was the single most often quoted reason in both survey periods for being in the central area that day, the majority of the audience, 62% in 1981/82, and 64% in 1985/86, were already in central London on the day of performance for some reason other than a theatre visit. Attendances by those who were

making a special theatre visit increased by around 0.5 million or 15% in 1985/86.

In 1981/82, those who worked or had business in central London, or who attended school, college or university in the area, were the second largest category of theatre-goer. The percentage of the audience who were in this category decreased in 1985/86, when this became only the third most often mentioned reason for being in central London that day. There was a loss of around 0.1 million attendances among this group in 1985/86 when compared with 1981/82,

The percentage of the audience who were in central London on holiday showed a large increase in 1985/86, and it became the second most often quoted reason for being in central London, from having been the third most quoted in 1981/82. Attendances by holidaymakers increased by around 1.6 million, or 84% in 1985/86.

3% were in central London on a shopping trip in 1981/82, and 2% in 1985/86, a fall in actual attendances by shoppers of around 0.1 million or 33%.

The study holiday was an important reason for being in central London among overseas students in 1981/82, when 12% were on some kind of study holiday, but this decreased to only 2% of overseas students in 1985/86. However, in 1985/86, the study holiday was less likely to be confined

to full-time students and to overseas visitors, and it was evident that a small market in study holidays for non-student visitors to London, which included a number of theatre visits as part of the course, did exist, although such holidays accounted for only around 20,000 attendances in 1981/82 and 60,000 in 1985/86. Total attendances by those on study holidays, however, were fairly stable over the two survey periods, with the increase in 1985/86 in the size of the overseas student section of the West End audience, and in study holidays among non-students, compensating for the lower likelihood of overseas students generally to be on a study holiday during the second survey period.

A number of other reasons for being in central London were given, although each accounted for less than 1% of the audience. These were; a hospital visit, a visit to friends or relatives, to see a particular exhibition or sporting event, and to attend a conference. The importance of the minor reasons for being in central London was greater at specific times than would appear from their being averaged out over the survey periods as a whole. For example, at a musical surveyed in March 1982, 4% of the audience were in central London mainly because of the Ideal Home exhibition, and at a comedy surveyed in July 1985, 2% of the audience were in central London mainly because of the American Bar Association Conference.

The following table shows the distribution of the main

reasons for being in central London on the day of performance for each area of residence group. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Area of Residence</u>						
	<u>Overseas</u>		<u>London</u>		<u>Rest</u>	
			<u>boroughs</u>		<u>U.K.</u>	
Weighted base	3145	(2398)	4677	(2405)	3845	(1681)
<u>Reason in c.London</u>	%		%		%	
Work/college etc	15	(13)	30	(22)	20	(22)
Live centrally	n/a	(n/a)	27	(24)	n/a	(n/a)
On holiday	64	(76)	1	(2)	15	(18)
For theatre visit	14	(7)	41	(49)	52	(53)
Study holiday	3	(2)	*	(1)	*	(1)
Shopping trip	2	(1)	1	(1)	7	(4)
Other reasons	2	(1)	*	(*)	5	(2)

Fig 5-2 Distribution of each area of residence group, by main reason in central London on the day of performance

*=less than 0.5%

Base = all respondents

Overseas visitors were more likely to be on holiday in the central London area on the day of performance than to be there for any other single reason, and they were much more likely to be on holiday than U.K. resident visitors to London were.

London boroughs residents were more likely to have come into the central London area specially to see the performance than for any other reason. The percentage of London boroughs residents who said this was the case increased in 1985/86, while the percentages who worked in central London or lived centrally decreased. This suggests that the increase in attendances by London boroughs residents in 1985/86 was largely accounted for by residents of the outer boroughs who did not work in central London. In 1985/86, fewer London boroughs residents worked in the central London area than lived centrally, the reverse of the 1981/82 situation. Attendances by London boroughs residents who worked in central London decreased from around 1.1 million in 1981/82 to around 0.8 million in 1985/86, and attendances by those who lived in a central London borough decreased from around 1.0 to around 0.9 million.

Those from parts of the U.K. outside London were the most likely area of residence group to have come into central London specially to see the performance. Commuters were also an important section of this area of residence group, and in 1985/86 the same percentage of this group were in central London for work or business reasons as was the case among London boroughs residents. The rest U.K. group were more likely than the other two area of residence groups to be in central London on a shopping trip, or to have come in for reasons other than the main ones - such as hospital visits, or to see family or friends.

The following table shows the area of residence distribution of those giving each of the three main reasons for being in central London on the day of performance. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Reason in central London</u>					
	<u>Work</u>		<u>Holiday</u>		<u>Theatre</u>	
Weighted base	2690 (1169)		2571 (2147)		4441 (2339)	
<u>Area of residence</u>	%		%		%	
Overseas	17	(25)	77	(85)	10	(5)
London boroughs	53	(44)	1	(2)	45	(52)
Rest U.K.	30	(31)	22	(13)	45	(43)

Fig 5-3 Distribution of those giving one of the three main reasons for being in central London on the day of performance, by area of residence

Base = those who work in central London, are on holiday or have come specially for a theatre visit

Those who worked in central London or had business there were most likely, in both survey periods, to be residents of London boroughs. Those who both lived in London boroughs and worked in central London declined in importance in 1985/86. They accounted for 13% of all West End attendances in 1981/82, but only 8% in 1985/86. The rest U.K. group of commuters to London remained a fairly stable group, both as a percentage of those working in central London and in terms of attendances throughout.

They accounted for around 0.6 million attendances in both survey periods, equivalent to 7% of total attendances in 1981/82 and 6% in 1985/86. There was an important market in overseas visitors with business commitments in the central London area, which increased from around 0.3 million attendances in 1981/82 to around 0.5 million in 1985/86. 3% of all West End attendances in 1981/82 and 5% in 1985/86 were accounted for by overseas visitors with business reasons for being in central London.

Holidaymakers were most likely to be overseas visitors. Attendances by overseas holidaymakers increased from around 1.5 million in 1981/82 to around 3.0 million in 1985/86. Holidaymakers from parts of the U.K. other than London showed a much smaller increase in attendances, from around 0.4 million in 1981/82, to around 0.5 million in 1985/86. Attendances by residents of London boroughs who were on holiday, presumably mainly residents of the outer London boroughs on day trips into central London, also showed an increase in 1985/86, from around 25,000 attendances in 1981/82 to around 80,000 in 1985/86. This provides support for the suggestion that among London boroughs residents, there was an increase in the percentage who were residents of the outer boroughs in 1985/86.

In 1981/82, both London boroughs residents and those from other parts of the U.K. formed equally important sections of those who had come into central London specially to see the performance. In 1985/86, however, London boroughs

residents formed the largest section of this group. This was a further indication that much of the increase in attendances by London boroughs residents in 1985/86 was likely to have been accounted for by residents of the outer London boroughs, since they were more likely to have had to make a trip into central London specially to see the performance than were those living close to the theatres.

As well as drawing its audience from a broader demographic base in 1985/86, the West End was therefore also less reliant on those locals who were close to the centre of London in the normal course of their day than in 1981/82.

The following table shows the distribution of the main reasons for being in central London on the day of performance, for each sex. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6775 (3201)	4892 (3307)
<u>Reason in c.London</u>	%	%
Work/college etc	18 (16)	29 (21)
Live centrally	12 (10)	10 (8)
On holiday	22 (29)	22 (36)
For theatre visit	41 (40)	34 (32)
Study holiday	1 (1)	1 (1)
Shopping trip	3 (2)	2 (1)
Other reasons	3 (2)	2 (1)

Fig 5-4 Distribution of each sex, by main reason in central London on the day of performance

Base = all respondents

Women were more likely, in both survey periods, to have come into central London specially to see the performance than for any other single reason. The same was true of men in 1981/82, but in 1985/86, a higher percentage of men were on holiday in central London than were there for any other single reason. Attendances by male holidaymakers increased from around 0.8 million in 1981/82, to around 2.0 million in 1985/86.

Men were more likely than women to work in central London. Although the percentage of each sex who worked in central London decreased in 1985/86, because of the large increase in overall attendances by men in 1985/86, attendances by

men who worked in central London were fairly stable, at around 1.1 million in both survey periods, while attendances by women who worked in central London decreased from around 0.9 million in 1981/82, to around 0.8 million in 1985/86. There was some loss of attendances among U.K. resident males who worked in central London in 1985/86, but this was largely replaced by new business from male overseas business visitors.

Women were more likely than men to live in the central London area, to have come into central London on a shopping trip, or to have come for other reasons such as a family visit.

The following table shows the sex distribution of those giving each of the three main reasons for being in central London on the day of performance. 1981/82 figures are given first, 1985/86 figures follow in brackets.

Reason in central London

	<u>Work</u>	<u>Holiday</u>	<u>Theatre</u>
Weighted base	2671 (1159)	2555 (2140)	4430 (2329)
<u>Sex</u>	%	%	%
Female	47 (42)	58 (44)	62 (55)
Male	53 (58)	42 (56)	38 (45)

Fig 5-5 Distribution of those giving one of the three main reasons for being in central London on the day of performance, by sex

Base-those who work in central London, are on holiday, or have come specially for a theatre visit

Those who worked in central London were most likely to be male in both survey periods. Those who had come in specially to see the performance were most likely to be female in both survey periods. The sex distribution of holidaymakers changed between 1981/82, when women predominated, and 1985/86, when men did. Attendances by male holidaymakers showed an increase of around 150% in 1985/86, compared with increase of around only 36% in attendances by female holidaymakers.

The following table shows the distribution of the main reasons for being in central London on day of performance, for each age group.

Age Group, 1981/82

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	931	2104	3152	2332	1741	919	449
<u>Reason in c.London</u> %	%	%	%	%	%	%	%
Work/college etc	6	25	27	24	24	21	6
Live centrally	8	16	13	9	6	7	12
On holiday	31	18	19	21	26	27	31
For theatre visit	48	35	34	38	38	39	44
Study holiday	2	3	1	1	*	*	*
Shopping trip	3	2	3	4	3	3	4
Other reasons	2	1	3	3	3	3	3

Age Group, 1985/86

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	774	1424	1549	1222	772	442	251
<u>Reason in c.London</u> %	%	%	%	%	%	%	%
Work/college etc	7	21	24	21	21	12	5
Live centrally	5	11	10	10	6	7	16
On holiday	42	28	33	26	31	44	46
For theatre visit	43	36	31	39	39	34	32
Study holiday	1	2	1	1	*	*	-
Shopping trip	2	2	1	3	2	2	1
Other reasons	*	*	*	*	1	1	*

Fig 5-6 Distribution of each age group, by main reason in central London on the day of performance

*=less than 0.5%

Base = all respondents

In 1981/82, all age groups were more likely to have come into central London specially to see the performance than for any other reason. This remained the case in 1985/86 for the under 25 and the 35-54 age groups, but all the other age groups were most likely to be in London on holiday in 1985/86.

The 25-34's were the most likely age group to have work or business in central London. At the extreme ends of the distribution, the 16-18's and 65 and overs were, not surprisingly, much less likely than the other age groups to have work or business in the central area (even though this category did include those who attended school, college or university in central London).

The 16-18's and 65 and overs were the most likely age groups to be on holiday in London in 1981/82, the 65 and overs in 1985/86.

In 1981/82, the 19-24 age group were the most likely to live centrally, and in 1985/86 it was the 65 and overs.

The 16-18's were the most likely age group to have come into central London specially to see the performance, in both survey periods. This would be likely to be because of educational group visits to the theatre. The 25-34's were consistently the least likely age group to have made a trip into central London specially to see the performance, and

therefore the most likely to be in central London already on the day of performance.

The 19-24's were consistently the most likely age group to be on a study holiday, and the 35-44's the most likely to be in central London on a shopping trip.

The following table shows the age distribution of those giving each of the three main reasons for being in central London on the day of performance. 1981/82 figures are given first, 1985/86 figures follow in brackets.

Reason in central London

	<u>Work</u>	<u>Holiday</u>	<u>Theatre</u>
Weighted base	2666 (1151)	2549 (2137)	4424 (2321)
<u>Age group</u>	%	%	%
16 - 18	2 (4)	10 (15)	10 (14)
19 - 24	20 (25)	15 (19)	17 (22)
25 - 34	32 (31)	23 (25)	24 (21)
35 - 44	21 (22)	18 (16)	20 (21)
45 - 54	16 (13)	17 (11)	15 (13)
56 - 64	8 (4)	11 (9)	9 (6)
65 and over	1 (1)	6 (5)	5 (3)
Mean age	36 (33)	38 (35)	37 (34)
(actual) (1)			

Fig 5-7 Distribution of those giving one of the three main reasons for being in central London, by age group

Base=those who work in central London, are on holiday, or have come specially for a theatre visit

Those who worked in central London contained the lowest percentages of 16-18's and 65 and overs. They were more likely than holidaymakers or those coming in specially to see a performance to be concentrated in the 19-34 age groups. Close to one-third of those who worked in central London in both survey periods fell into the 25-34 age group. They had the lowest mean age of the three groups analysed.

Holidaymakers consistently had the oldest mean age, even though this decreased considerably in 1985/86, but their age distribution was more polarised than that of the other two groups, with higher percentages of 65 and overs in both survey periods, and of 16-18's in 1985/86.

The mean age of those who had come into central London specially to see the performance fell between that of those who worked in central London and those who were holidaymakers, but they contained a slightly higher percentage of under 25's than either of the other two groups.

The following table shows the distribution of the main reasons for being in central London on the day of performance, for each of the four frequency groups of London theatre-going analysed in section 1 of Chapter 4.

Frequency group

New

	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2561(2011)	2794(1749)	4545(2154)	1750(574)
<u>Reason in</u>				
<u>c. London</u>	%	%	%	%
Work/college	15 (12)	18 (22)	26 (22)	34 (21)
Live centrally	2 (3)	5 (7)	16 (13)	22 (21)
On holiday	44 (54)	30 (33)	13 (18)	3 (8)
Theatre visit	28 (27)	39 (35)	41 (42)	38 (48)
Study holiday	2 (1)	1 (*)	1 (2)	1 (-)
Shopping trip	5 (2)	4 (2)	2 (2)	1 (1)
Other reasons	4 (1)	3 (1)	* (*)	1 (*)

Fig 5-8 Distribution of each frequency group, by main reason in central London on the day of performance

*=less than 0.5%

Base = all respondents

New visitors were more likely to be in central London on holiday than for any other single reason, and these two characteristics are evidently related. All the other frequency groups were more likely to have come into central London specially to see the performance than for any other single reason.

The percentage of occasional theatre-goers who worked in central London increased in 1985/86, but decreased for all the other frequency groups, especially the regulars, with

13% fewer regulars working in central London than in 1981/82. This was equivalent to a fall in attendances among regular theatre-goers who worked in central London, from around 0.4 million in 1981/82 to around 0.2 million in 1985/86.

Regular theatre-goers were the most likely frequency group to live in the central area, and as with new visitors being the most likely group to be holidaymakers, these two characteristics are evidently linked.

There was a large increase, of 10 percentage points, in the percentage of regulars who had come into central London specially to see the performance in 1985/86. This is a further indication that the regular theatre-going audience was less likely to be drawn from local residents and workers in 1985/86 than in 1981/82.

The following table shows the frequency distribution of London theatre-going of those giving each of the three main reasons for being in central London on the day of performance. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Reason in central London</u>						
	<u>Work</u>		<u>Holiday</u>		<u>Theatre</u>	
Weighted base	2569 (1147)		2548 (2134)		4419 (2317)	
<u>Visits in previous</u>						
<u>12 months</u>	%		%		%	
This is first visit	14	(19)	43	(51)	16	(23)
1 other	9	(15)	19	(16)	12	(14)
2 others	10	(16)	13	(12)	13	(12)
3 - 6 others	19	(27)	18	(16)	30	(27)
7 - 11 others	16	(12)	5	(3)	14	(12)
12 or more others	22	(11)	2	(2)	15	(12)
Mean frequency						
(actual) ⁽²⁾	3	(2)	1	(1)	3	(2)

Fig 5-9 Distribution of those giving one of the three main reasons for being in central London, by frequency of London theatre-going

Base = those who work in central London, are on holiday or have come in specially for a theatre visit

The percentage of those working in central London who had made 12 or more visits to London theatres in the previous 12 months halved in 1985/86. Although ease of access to the theatre during the normal course of the day was probably a major contributory factor to regular London theatre-going in both survey periods, since a lower percentage of those working in central London than of the other two groups were making their first visit in 12 months to a London theatre,

in 1985/86 the percentage who had made 12 or more visits in the previous 12 months was slightly higher among those who had come in specially to see the performance than among those who worked in central London.

The percentage of holidaymakers who were on their first visit to a London theatre in 12 months increased in 1985/86. Coupled with the overall increase in attendances by holidaymakers, this meant that there was a very large increase in 1985/86 in the actual number of holidaymakers who were, at the time of the survey, making their first visit in 12 months to a London theatre, from around 0.8 million in 1981/82 to around 1.9 million in 1985/86.

(2) Size of group attending the theatre

In both survey periods, respondents were asked about the size of the group they were in at the performance surveyed. In 1981/82, the largest category specified in the questionnaire was for groups of 12 or more, while in the 1985/86 version, the large groups category was subdivided into groups of 12-20 and groups of 21 or more. Since a census was attempted at each performance, instead of, as is often done in interview surveys, only one member of a party being invited to answer on behalf of that party, and since it was therefore assumed that each member of the audience would be equally likely to participate in the survey regardless of the size of group they were in, these findings are thought to represent the true distribution of the West End audience aged 16 and over by size of group. No weightings, therefore, have been carried out for party size.

The following table presents the findings on group size. Estimated attendances accounted for by each size of group are given in brackets.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11710	6529
<u>Size of group</u>	%	%
Alone	8 (0.7)	9 (1.0)
2	50 (4.4)	53 (5.6)
3 - 6	32 (2.8)	31 (3.3)
7 - 11	3 (0.3)	3 (0.3)
12 or more	7 (0.6)	12-20 2 (0.2)
		21+ 2 (0.2)

Fig 5-10 Distribution of the West End audience, by size of group attending theatre

Base = all respondents

Attending the theatre as one of a twosome was evidently the most usual form of West End theatre-going, with the largest category of attendances, the majority in 1985/86, accounted for by those in twosomes. Attendances by those in twos increased by around 1.2 million, or 27%, between 1981/82 and 1985/86. Around two-thirds of the overall increase in attendances in 1985/86 was accounted for by those in twosomes.

Small groups of 3-6 accounted for the second largest category of theatre-goers, with an increase in attendances by theatre-goers in this size of group of around 0.5 million, or 18%, in 1985/86.

Those visiting the theatre on their own were the third

largest category. Those on their own formed a more important section of the West End audience than did large parties of 12 or more, especially in 1985/86, when they accounted for more than twice as many attendances as large groups. Their percentage share of total attendances increased slightly in 1985/86, and attendances by those visiting the theatre on their own showed the highest percentage increase of any group size over the two survey periods, at around 43%.

Large parties of 12 or more were the fourth most important category of theatre-goers. In 1985/86, when a subdivision of large parties was made, attendances were divided almost equally between those in groups of 12-20 and those in groups of 21 or more. There was a decrease in the importance of large parties between 1981/82 and 1985/86, both in terms of the percentage of total attendances they accounted for, and in terms of actual attendances. Attendances by large groups fell from around 570,000 in 1981/82 to around 440,000 in 1985/86, a fall of about 23%. This decline could have been partly accounted for by teachers' industrial action in 1985 and 1986, with fewer extra-curricular activities and consequent cut-backs in educational trips to the theatre. However, attendances by large party members in full-time education were around 274,000 in 1981/82 and 246,000 in 1985/86, a decrease of only around 28,000, or 10%, so that other factors probably played a part in the loss of attendances among large groups in 1985/86.⁽³⁾ 48% of large party members were in full-

time education in 1981/82, and 56% in 1985/86.

Those in medium-sized groups of 7-11 were the least important category of theatre-goers, and both the percentage of attendances and actual attendances they accounted for were fairly stable over the two survey periods.

The following table shows the distribution of each area of residence group by size of group attending the theatre. 1981/82 figures are given first, 1985/86 figures follow in brackets. In this and all subsequent tables in this section, the two largest categories for group size given in the 1985/86 questionnaire are recombined into the 12 or more in group category, for ease of comparison with the 1981/82 results.

Area of Residence

		<u>London</u>		<u>Rest</u>	
	<u>Overseas</u>	<u>Boroughs</u>		<u>U.K.</u>	
Weighted base	3186 (2392)	4686 (2447)		3838 (1680)	
<u>Size of group</u>	%	%		%	
Alone	12 (12)	8 (7)		6 (7)	
2	51 (56)	53 (53)		47 (50)	
3 - 6	27 (24)	33 (34)		34 (35)	
7 - 11	2 (2)	3 (3)		3 (3)	
12 or more	8 (6)	3 (3)		10 (5)	

Fig 5-11 Distribution of each area of residence group,
by size of group attending theatre

Base=all respondents

Although the majority of overseas visitors were in twos, and twosomes increased in importance among overseas visitors in 1985/86, overseas visitors were consistently the most likely area of residence group to visit the theatre alone. Small groups of 3-6 formed a less important section of the overseas than of the U.K. resident audience. In 1981/82, large parties of 12 or more were less important among overseas visitors than among U.K. residents from outside London, but in 1985/86, large parties formed a higher percentage of overseas visitors than of the rest U.K. group. While attendances by large parties declined among the U.K. resident audience in 1985/86, they increased among overseas visitors from around 190,000 in 1981/82 to around 210,000 in 1985/86, an increase of about 11%.

The distribution of London boroughs residents by group size was virtually identical in both survey periods. The majority of London boroughs residents attended the theatre as one of a twosome. A lower percentage of London boroughs residents than of the other area of residence groups attended the theatre as part of a large group of 12 or more. Attendances by London boroughs residents in large parties showed little change in 1985/86, remaining at around the 1981/82 level of 100,000.

Residents of other parts of the U.K. were the most likely area of residence group to attend the theatre as part of a small group of 3-6, and twosomes predominated less than among the other area of residence groups. In 1981/82, they were the most likely area of residence group to attend the theatre as part of a large group of 12 or more, with attendances by residents of this group who were in large parties of around 280,000, but this fell to around 130,000 in 1985/86, a decrease of about 54%, and they became less likely than overseas visitors to attend the theatre in large parties.

The following table shows the area of residence distribution of each size of group.

Size of group, 1981/82

	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	930	5857	3749	347	827
<u>Area of residence</u>	%	%	%	%	%
Overseas	39	27	23	20	33
London boroughs	38	43	42	40	18
Rest U.K.	23	30	35	40	49

Size of group, 1985/86

	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	582	3457	2020	198	262
<u>Area of residence</u>	%	%	%	%	%
Overseas	48	39	28	28	48
London boroughs	30	35	40	36	22
Rest U.K.	22	26	32	36	30

Fig 5-12 Distribution of each size of group, by area of residence

Base = all respondents

Overseas visitors consistently accounted for the largest group of those attending the theatre on their own, especially in 1985/86, when they accounted for almost half of those on their own. Attendances by overseas visitors on their own increased from around 0.3 million in 1981/82, to around 0.5 million in 1985/86.

In 1981/82, London boroughs residents formed the largest

group of those in twosomes, but in 1985/86, overseas visitors accounted for the largest group of those in twosomes. Attendances by overseas visitors in twosomes increased from around 1.2 million in 1981/82 to around 2.2 million in 1985/86.

London boroughs residents consistently formed the largest group of those in small parties of 3-6.

London boroughs residents and those from other parts of the U.K. formed equally important sections of the 7-11 group size, in both survey periods.

Residents of the U.K. outside London accounted for nearly half of all those in large groups of 12 or more in 1981/82, but in 1985/86, overseas visitors formed the largest area of residence group of those in large parties.

In general, overseas visitors were most important at the extreme ends of the group size distribution, among those alone or in large parties, while London boroughs residents were most important in the middle range of 2 to 11 in the group. The percentage from other parts of the U.K. generally increased in importance as the size of the group increased, except that in 1985/86, they accounted for a lower percentage of those in large groups than of those in medium or small sized groups.

The following table shows the distribution each sex by size of group attending the theatre. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6754 (3179)	4880 (3318)
<u>Size of group</u>	%	%
Alone	7 (5)	11 (12)
2	50 (53)	50 (52)
3 - 6	32 (34)	31 (29)
7 - 11	3 (3)	3 (2)
12 or more	8 (4)	5 (4)

Fig 5-13 Distribution of each sex, by size of group attending theatre

Base = all respondents

Men were more likely than women to attend the theatre alone, and women were generally more likely to attend the theatre as part of a group than men, including as part of a small group of 3-6. However, attendances by women in large groups of 12 or more decreased from around 400,000 in 1981/82 to around 210,000 in 1985/86. Most of this decrease was among U.K. resident women from outside London. This suggests that the loss of attendances among large groups in 1985/86 which could not be accounted for by fewer school parties due to teachers' industrial action, may have been accounted for by a decrease in outings by groups of

women, such as office outings and organised coach parties. Attendances by men in large parties increased from around 170,000 in 1981/82 to around 230,000 in 1985/86.

The following table shows the sex distribution of each size of group.

	<u>Size of group, 1981/82</u>				
	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	917	5834	3727	332	820
<u>Sex</u>	%	%	%	%	%
Female	46	58	59	61	70
Male	54	42	41	39	30

	<u>Size of group, 1985/86</u>				
	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	579	3452	2011	195	260
<u>Sex</u>	%	%	%	%	%
Female	29	49	52	52	48
Male	71	51	48	48	52

Fig 5-14 Distribution of each size of group, by sex

Base = all respondents

The majority of those visiting the theatre alone were male, especially in 1985/86. A fear of being out alone in London at night was possibly a contributory factor to the

lower percentage of women among those visiting the theatre alone, than among other sizes of group.

Twosomes were divided by sex identically to the actual sex distribution in the overall audience, indicating that the sexes were almost equally likely to attend the theatre as one of a twosome. Since women accounted for more attendances than men in 1981/82, this meant that there were more twosomes made up of two women than of two men or of one of each sex in the first survey period. In 1985/86, the number of each sex who were in twosomes was about equal, although it cannot be determined from these results whether single or mixed sex twosomes were more common in 1985/86. Women in twosomes accounted for around 2.6 million attendances in 1981/82, compared with around 1.8 million attendances by men in twosomes; in 1985/86, around 2.8 million attendances by each sex were accounted for by those in twosomes.

Women consistently formed the majority of small groups of 3-6 and medium-sized groups of 7-11, although they predominated less in 1985/86 than in 1981/82 among these sizes of groups.

There was a major shift in the sex distribution of large parties of 12 or more in 1985/86, from a situation where women formed the great majority of this category in 1981/82, at 70%, to men forming a slight majority in

1985/86, at 52%.

The following table shows the distribution of each age group by size of group attending the theatre.

	<u>Age group, 1981/82</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	940	2113	3159	2350	1740	916	455
<u>Size of group</u>	%	%	%	%	%	%	%
Alone	2	7	9	9	9	9	12
2	17	50	56	51	52	58	54
3 - 6	47	32	27	32	34	27	29
7 - 11	6	4	3	3	2	2	2
12 or more	28	7	5	5	3	4	3

	<u>Age group, 1985/86</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	751	1413	1537	1218	770	442	260
<u>Size of group</u>	%	%	%	%	%	%	%
Alone	7	9	11	8	8	7	6
2	37	52	60	53	53	62	53
3 - 6	42	32	25	33	34	26	24
7 - 11	5	3	2	3	2	1	2
12 or more	9	4	2	3	3	4	15

Fig 5-15 Distribution of each age group, by size of group attending theatre

Base = all respondents

For all age groups except the 16-18's, twosomes were the most common group size for visiting the theatre, followed by small groups of 3-6.

The 65 and overs were the most likely age group to visit alone in 1981/82, and the 25-34's in 1985/86. The 55-64's were consistently the most likely age group to visit in twosomes, and the 16-18's to visit the theatre in small groups of 3-6, and in medium sized groups of 7-11. The 16-18's were the most likely age group to visit the theatre in large groups of 12 or more in 1981/82, whereas the 65 and overs were the most likely age group to do so in 1985/86.

In 1981/82, the 16-18's were the least likely age group to attend the theatre alone, and in 1985/86, the joint second least likely. This low likelihood of the 16-18's attending the theatre alone was probably due to parents and group leaders being responsible for most of the theatre outings for this age group. Attendances by the large party section of this age group declined, however, in 1985/86 to around 110,000, compared with around 190,000 in 1981/82. This decrease was equivalent to around 62% of the overall loss of large party attendances in 1985/86. Since only around 28,000 attendances were lost to groups of full-time students and schoolpupils aged 16 or over in 1985/86, this means that other categories of large group, such as office outings, had tended to consist largely of young theatre-goers in 1981/82.

In 1985/86, the 65 and over age group changed from being the most to the least likely age group to visit alone. The 65 and overs in 1985/86 were much more likely to visit as part of a large group of 12 or more than to visit alone, the reverse of the 1981/82 situation. This may have been a result of no mid-week matinees being included in the 1985/86 surveys, since the 65 and overs had proved to be particularly likely to attend these alone in the 1981/82 surveys, although the incidence of large groups among the 65 and overs was higher at the majority of productions surveyed in 1985/86 than it had been for productions surveyed in the same category in 1981/82. This suggests that there was a real increase in large party outings to the theatre by the 65 and overs in 1985/86.

The following table shows the age distribution of each size of group.

Size of group, 1981/82

	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	925	5851	3736	341	820
<u>Age group</u>	%	%	%	%	%
16 - 18	2	3	11	16	33
19 - 24	16	18	18	25	20
25 - 34	28	30	24	24	19
35 - 44	21	20	20	18	15
45 - 54	17	15	15	8	6
55 - 64	10	10	8	5	5
65 and over	6	4	4	4	2
Mean age (actual)	39	38	36	32	29

Size of group, 1985/86

	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	554	3432	2000	172	230
<u>Age group</u>	%	%	%	%	%
16 - 18	9	8	15	24	26
19 - 24	24	22	23	26	17
25 - 34	31	28	19	18	10
35 - 44	17	19	21	19	17
45 - 54	11	12	13	8	10
55 - 64	6	8	6	3	6
65 and over	2	3	3	2	14
Mean age (actual)	33	35	33	29	36

Fig 5-16 Distribution of each size of group, by age group

Base = all respondents

In 1981/82, mean age decreased as group size increased. Those visiting the theatre in groups of 12 or more had the youngest mean age, with the 16-18's forming the largest age group of parties of 12 or more. All categories of group size except large parties of 12 or more showed a decrease in mean age in 1985/86, with the greatest change being among those who visited the theatre alone. Those in medium sized groups of 7-11 had the youngest mean age in 1985/86, while those in large groups of 12 or changed from having the youngest mean age in 1981/82, to having the oldest in 1985/86.

64% of those visiting the theatre alone were aged under 35 in 1985/86, compared with 46% in 1981/82. The under 35's in 1985/86 were generally more likely to attend the theatre alone than they were in 1981/82, suggesting that there was a change among many young theatre-goers in 1985/86 away from the educational group outing in favour of the student on his or her own. Attendances by the under 35's visiting the theatre alone were around 0.3 million in 1981/82 and around 0.6 million in 1985/86.

Although the 16-18's formed the largest age group of large party members in both survey periods, an increase in attendances by the 65 and overs in large parties, from around 11,000 in 1981/82 to around 62,000 in 1985/86, coupled with a substantial decrease in attendances by the 16-18's in large parties, resulted in the large party category having the oldest mean age in 1985/86. Thus,

while in 1981/82, the under 25's accounted for the majority of large party members, in 1985/86 the majority of large party members were aged 25 or over.

The following table shows the distribution of group size for each of the four frequency groupings of London theatre-going analysed in section 1 of Chapter 4. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Frequency group (London theatre-going)</u>				
<u>New</u>				
	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2543(2007)	2785(1732)	4545(2138)	1740(581)
<u>Size of group</u>	%	%	%	%
Alone	6 (7)	6 (7)	8 (9)	16 (23)
2	47 (53)	49 (53)	51 (53)	54 (54)
3 - 6	32 (31)	34 (33)	33 (33)	24 (20)
7 - 11	4 (3)	3 (2)	3 (2)	2 (1)
12 or more	11 (6)	8 (5)	5 (3)	4 (3)

Fig 5-17 Distribution of each frequency group, by size of group attending theatre

Base = all respondents

For all frequency groups, attending the theatre as part of a twosome was most common. In general, the less frequent the theatre-goer, the more likely they were to be part of a large group of 12 or more, and the less likely to be

visiting the theatre alone.

New visitors were the most likely frequency group to be in a large party of 12 or more. Occasional and frequent theatre goers were the most likely frequency groups to attend the theatre in small groups of 3-6, suggesting that a theatre outing with friends or family played a particularly important part in their theatre-going. Regular theatre-goers were much more likely than the other frequency groups to attend the theatre alone.

These findings suggest that regular theatre-goers were more likely than less frequent theatre-goers to be influenced by a desire to see a particular production regardless of whether friends were going too, whereas less frequent theatre-goers were likely to be influenced by the fact that friends were going to the theatre or that an outing had been organised for them. It is possible that a number of those who had not made any visits to London theatres in the previous 12 months apart from the performance surveyed, might not have attended the London theatre at all if a group outing had not been organised for them.

The following table shows the distribution of frequency of London theatre going for each size of group.

	<u>Size of group, 1981/82</u>				
	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	923	5827	3711	340	811
<u>Visits in previous</u>					
<u>12 months</u>	%	%	%	%	%
This is first visit	15	20	22	31	34
1 other	9	12	13	8	17
2 others	8	12	13	14	13
3 - 6 others	23	27	29	28	19
7 - 11 others	15	13	12	9	8
12 or more others	30	16	11	10	9
Mean frequency					
(actual)	3	3	2	2	2

	<u>Size of group, 1985/86</u>				
	<u>Alone</u>	<u>2</u>	<u>3-6</u>	<u>7-11</u>	<u>12+</u>
Weighted base	564	3444	2008	191	251
<u>Visits in previous</u>					
<u>12 months</u>	%	%	%	%	%
This is first visit	24	30	31	36	46
1 other	11	14	16	13	12
2 others	11	13	13	14	8
3 - 6 others	23	23	24	29	18
7 - 11 others	9	10	10	5	8
12 or more others	22	10	6	3	8
Mean frequency					
(actual)	3	2	2	2	2

Fig 5-18 Distribution of each size of group, by frequency
of London theatre-going
Base = all respondents

First time visitors formed the largest frequency category of all sizes of group in 1985/86, whereas in 1981/82, they had formed the largest frequency category only of those in groups of 7 or more. In both survey periods, the percentage who were making their first visit to a London theatre in 12 months increased as group size increased. In 1981/82, the largest frequency category of theatre-goers on their own was those making 12 or more other visits to London theatres in the previous 12 months. Attendances by this group of regular theatre-goers, who attended the theatre on their own, were stable at around 210,000 in both survey periods. However, there was a substantial increase in 1985/86 among those who were visiting the theatre alone and who were making their first visit in 12 months to a London theatre. They accounted for around 240,000 attendances in 1985/86, compared with around 105,000 in 1981/82.

(3) Travelling to the theatre, and travel problems

Respondents were asked, in both survey periods, about their method of travel to the theatre for the performance surveyed. Main method of travel only was requested, with the intention that respondents should specify the method of travel they used for the longest period or distance. It was assumed that there would be very few cases in which two or more methods would be used for an equal time or distance. The respondent who had used one method of travel for a longer period of time than a second method, but with the second method having covered a greater distance, may have had some difficulty in answering this question. However, by asking respondents to define the main method for themselves, the results would represent respondents' own perception of the most important method of travel they used. In those few cases where respondents did give more than one answer, only the first option to be ticked was analysed. In 1985/86, respondents were asked in addition whether they had any problems with travel home after a performance at a London theatre.

In 1981/82, the question on method of travel listed nine possible answers, with space left for any other methods that might have been used to be written in. Only two respondents wrote in answers which were not listed on the questionnaire. Both were respondents who claimed to have travelled by air from Scotland specifically to see the performance, and therefore considered their main method of travel to have been air, although they travelled within

London by tube. As such responses were rarities, the 1985/86 question on travel to the theatre was presented as a closed question with nine options.

The following table shows the distribution of the West End audience by the main methods of travel they used for travelling to the theatre for the performance surveyed. The figures in brackets represent the estimated number of journeys to the theatre made by each travel method during each survey period. In most cases, these figures could be doubled to allow for return journeys, thus giving the total number of journeys by each method made by West End audiences in connection with their theatre visit, during the two survey periods. However, those who walked to the theatre, say from their place of work, would be likely to have used some other method of returning home after the performance, and some people may have travelled to the theatre by public transport to meet up with friends who had cars and who would drive them home, so that doubling the single journey figures would provide only a rough guide to the actual total number of journeys made by each method. Note that throughout this section, journeys refer to the total number of journeys made by all theatre-goers; for example, four people sharing the same car would be counted as four car journeys.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11702	6518
<u>Method of travel</u>	journeys	journeys
	% (millions)	% (millions)
Hired coach/minibus	4 (0.4)	2 (0.2)
Bus	4 (0.4)	10 (1.1)
Train	13 (1.1)	11 (1.2)
Tube (underground)	27 (2.4)	34 (3.6)
Car	28 (2.5)	22 (2.3)
Taxi	11 (1.0)	10 (1.1)
Motorbike	* (#)	* (#)
Bicycle	1 (0.1)	* (#)
On foot	10 (0.9)	10 (1.1)
Other (81/82 only)	* (#)	n/a (n/a)
After show travel		.
problems (85/86 only)	n/a -	13 -

Fig 5-19 Distribution of the West End audience, by method of travel to the theatre

*=less than 0.5%

#=less than 0.05 million journeys

Base = all respondents

In 1981/82, cars accounted for more journeys to the theatre than any other method of travel, but in 1985/86 use of cars declined, and they became the second most often used method, with a fall of around 130,000 car journeys between 1981/82 and 1985/86. Only cars and hired coaches/minibuses showed a decline in use in 1985/86, and this may have been linked to the introduction of wheel clamping in central

London in 1984, and to increased restrictions on coach parking in central London since 1981/82.

Compared with users of other travel methods, a high percentage of car users, 43% in 1981/82 and 35% in 1985/86, were attending the theatre as part of a small group of 3-6, and a low percentage, only around 2% in both survey periods, were attending the theatre on their own. 12% of car users reported after show travel problems in 1985/86, and their most common problem was the long walk to their cars after the performance, necessitated by a lack of parking space near the theatre.

Tube (or underground) was used slightly less than cars in 1981/82, but became the most commonly used method of travel to the theatre in 1985/86. Around 1 in every 3 journeys to the theatre was made by tube in 1985/86, and the number of tube journeys made by theatre-goers increased by around 1.2 million, or 50%, in 1985/86. Only 7% of tube users reported after show travel problems in 1985/86, and they were the least likely group of public transport users to report such difficulties. Their most common problem was the infrequency of tube services late at night.

British Rail trains were consistently the third most commonly used travel method, and use of trains showed only a small level of change over the two survey periods. Trains accounted for a slightly smaller percentage of total

journeys in 1985/86 than in 1981/82, but the number of journeys made by train increased by around 25,000, or 2%, in 1985/86. 22% of rail users reported problems with after show travel, and they were the most likely group to report such difficulties. Their most common problem was the early departure times of last trains. A SWET leaflet, which is reproduced in Appendix 8, gives the times of last trains to major stations from departure points in the theatre area, and indicates that this problem may have been as much perceived as real.

Taxi was consistently the fourth most commonly used method of travel (jointly with walking and bus in 1985/86), and use of taxis increased by around 90,000 journeys, or about 10% in 1985/86. 21% of taxi users in 1985/86 reported problems with after show transport, their most common problem being finding a taxi.

Walking was the fifth most commonly used method of getting to the theatre in 1981/82, and joint fourth in 1985/86. Around 180,000 more theatre-goers walked to the theatre in 1985/86 than in 1981/82.

Bus was the least often used of the public transport methods of travel. It was the sixth most often used method of travel in 1981/82; in 1985/86, however, there was a large increase in the number of bus journeys made of around 700,000, and it tied for fourth place with use of taxis and

walking to the theatre. It is possible that there was some degree of confusion among respondents between public buses and hired coaches, especially in 1985/86, when a higher percentage of the audience were from overseas than in 1981/82. Overseas visitors might not invariably have understood the term bus to have the same meaning as the U.K. resident audience would, and some of them would perhaps have thought that a hired coach was meant by the term bus. However, as the hired coach/minibus option appeared before the bus option in the questionnaires, so that those who travelled by hired coaches should have ticked this option before reading the bus option, the degree of bias introduced by possible misinterpretation of the term bus is unlikely to have been significant. 20% of bus users reported problems with after show travel in 1985/86, a much higher percentage than among those using the other London Regional Transport service, the tube. Their most common problem was the infrequency of late bus services.

Travel by hired coaches or minibuses, while about the same level as travel by public buses in 1981/82, declined in importance in 1985/86, both as a percentage of journeys made and in actual number of journeys made by this method. The latter decreased by around 140,000 journeys in 1985/86. This was likely to have been linked to the 130,000 decrease in attendances by theatre-goers in large parties of 12 or more in 1985/86. Large parties were also much less likely to travel by hired coach or minibus in 1985/86 than in

1981/82. 33% of large party members in 1981/82 and 16% in 1985/86 had used this method of travel to the theatre; these figures are equivalent to around 190,000 and 70,000 journeys, respectively.

Bicycles were used to travel to the theatre by 1% in 1981/82 and by less than 0.5% in 1985/86. Motorbike was the least often used method of travel, by less than 0.5% of the audience in each survey period. Fewer than 100,000 journeys to the theatre in each survey period were made by either bicycle or motorbike.

In 1985/86, in response to the additional question on whether respondents had any problems with travel home after the performance, 13% overall said that this was the case. The most common problems were; finding a taxi, early departure times of last trains, and the infrequency of late bus services. Other after show travel problems mentioned by 1% or more of the audience were, in order of importance; train services being infrequent at night, early departure times of the last tube services, cars having to be parked some distance from the theatre necessitating a long walk after the performance, and tube services being infrequent at night.

Both the 1981/82 and the 1985/86 questionnaires included a question on deterrents to theatre-going. Of those who answered this question, 26% in 1981/82 and 12% in 1985/86

said that problems with travel (excluding the cost of travel) put them off visiting the theatre in London. The lower level of deterrence of travel difficulties in 1985/86 was likely to have been accounted for by the higher percentage of the audience who were new visitors to London theatres, and for whom travel was less likely to have been perceived as a problem than for those who regularly travelled to the theatre. The most commonly mentioned travel problems which were deterrents to London theatre-going in 1981/82 were, in order of importance; parking, difficulties with London Regional Transport services, and the early departure times of last trains. In 1985/86, the most commonly mentioned problems were, in order of importance; parking, early departure times of last trains, and heavy evening traffic in London.

The 1985/86 surveys included questions on expenditure associated with the theatre visit (full details are given in Chapter 7). A question on expenditure on travel to and from the theatre, excluding money previously spent for other travel purposes on passes, travelcards, etc., was included in this set of questions. Total expenditure was requested, and the overall mean amounts spent indicated that in most cases a return fare was given by respondents. Respondents who had travelled to the theatre by public transport, and who had incurred expenditure on travel solely because of their theatre visit, had spent a mean amount on their total travel costs to and from the theatre of £1.80 per person. For users of cars, the figure was

£1.90 per person, and for taxi users, £2.65 per person.

The following table shows the distribution of users of the five most common methods of travelling to the theatre, excluding those who walked, by the three most often quoted reasons for being in central London on the day of performance.

Method of travel, 1981/82

	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	470	1409	3154	3272	1284
<u>Reason in c.London</u>	%	%	%	%	%
Work, college, etc	25	18	23	18	28
On holiday	30	9	30	5	46
For theatre visit	26	57	30	58	10

Method of travel, 1985/86

	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	657	707	2214	1437	641
<u>Reason in c.London</u>	%	%	%	%	%
Work, college, etc	14	23	16	10	25
On holiday	33	12	47	7	55
For theatre visit	38	55	27	68	8

Fig 5-20 Distribution of users of the most common methods of travel, by reason in central London on the day of performance

Base = bus, train, tube, car and taxi users

In 1981/82, bus users were most likely to be on holiday in London. In 1985/86 they were most likely to have come in specifically to see the performance, and were less likely than in 1981/82 to be already working in London. Owing to a large overall increase in the number of bus journeys in 1985/86, however, the number of bus journeys made by those who worked in London did increase in 1985/86, by around 60,000 journeys.

Train users were far more likely to have come into London specially to see the performance than for any other reason. The 18% of train users in 1981/82 and 23% in 1985/86 who were already in London mainly because of work or business had presumably used one of the British Rail links within London, such as the Waterloo and City Line, to travel to the theatre.

In 1981/82, tube users were equally likely to be on holiday or to have come in specially to see the performance, but in 1985/86 there was a large increase in the number of holidaymakers using the tube, and they accounted for nearly half of all tube users. Holidaymakers were responsible for most of the increase in tube journeys by theatre-goers in 1985/86, making around 0.7 million tube journeys in 1981/82, and around 1.7 million tube journeys in 1985/86.

The majority of car users had come into central London that day specially to see the performance. This suggests that

the introduction of wheel clamping in central London could have had a major impact on West End attendances, since car driving theatre-goers might be discouraged from coming into central London at all if they did not have to come in for reasons other than a theatre visit.

Holidaymakers consistently formed the largest group of taxi users. However, taxi users were more likely to work or have business in central London than were users of any of the other travel methods analysed. They were very unlikely to have made a special trip into London to see the performance. Thus taxi users would be very likely to be close to the theatre already that day, and most taxi journey to the theatre were therefore likely to have been quite short.

The following table shows the distribution of each area of residence group by main methods of travel used for getting to the theatre. 1981/82 figures are given first, 1985/86 figures follow in brackets.

Area of residence

	<u>London</u>					
	<u>Overseas</u>		<u>Boroughs</u>		<u>Rest U.K.</u>	
Weighted base	3120 (2394)		4654 (2399)		3836 (1674)	
<u>Method of travel</u>	%		%		%	
Hired coach/minibus	4	(2)	*	(1)	7	(2)
Bus	10	(11)	8	(12)	4	(7)
Train	4	(3)	7	(9)	25	(23)
Tube (underground)	36	(49)	30	(31)	16	(20)
Car	6	(5)	39	(31)	33	(31)
Taxi	24	(17)	5	(6)	6	(7)
Motorbike	*	(5)	1	(1)	*	(*)
Bicycle	*	(-)	2	(*)	-	(-)
On foot	16	(13)	8	(9)	8	(10)
Other (81/82 only)	-	(n/a)	-	(n/a)	*	(n/a)
After show						
travel problems						
(85/86 only)	n/a	(9)	n/a	(13)	n/a	(15)

Fig 5-21 Distribution of each area of residence group,
by method of travel to the theatre

*=less than 0.5%

Base = all respondents

Overseas visitors were more likely to travel to the theatre by tube than by any other method, especially in 1985/86, when nearly half of all overseas visitors did so. The percentage of overseas visitors travelling by taxi, their second most used method of travel, fell in 1985/86, but

because of a large increase in the numbers of overseas visitors, the actual number of journeys by taxi made by overseas visitors were little changed in 1985/86. Around 0.6 million taxi journeys to the theatre were made by overseas visitors in both survey periods. A much higher percentage of overseas visitors than of U.K. residents travelled to the theatre by taxi in both survey periods. This may have reflected a degree of uncertainty among overseas visitors about the geography of London, and theatre locations in particular. They were, however, also more likely than U.K. residents to travel to the theatre on foot, presumably because their sightseeing took them within a reasonable walking distance from the theatre area during the day. Overseas visitors were less likely than U.K. residents to say they had problems with after-show travel in 1985/86, but this was likely to have been because a high percentage were new to London theatres that year and had not as yet experienced any travel difficulties. It may also have been the case that the majority of overseas visitors would have had shorter distances to cover after the show than the majority of U.K. residents, and fewer commitments the following day which might make them anxious to be home early. The most commonly mentioned after show travel problem among overseas visitors in 1985/86 was the difficulty of finding taxis.

In 1981/82, London boroughs residents were more likely to travel to the theatre by car than by any other method. In 1985/86, they were equally likely to travel by car or by

tube, and their use of public transport generally increased at the expense of their use of cars in 1985/86. London boroughs residents made around 1.4 million car journeys in 1981/82 and around 1.2 million in 1985/86. Their most common after show travel problem in 1985/86 was the infrequency of late bus services.

Residents of other parts of the U.K. showed much less variation in their methods of travel than the other two groups between 1981/82 and 1985/86. They consistently used cars more often than any other method of travel, and this would be partly because they were less likely to have access to direct public transport to the theatre areas than London boroughs residents would. They were the least likely area of residence group to travel to the theatre by tube or bus, and the majority of those from this area of residence group who did so were already working in London that day. Their most common after show travel problem in 1985/86 was the early departure times of last trains.

The following table shows the distribution of users of the five most common methods of travelling to the theatre, excluding walking, by area of residence.

Method of travel, 1981/82

	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	472	1409	3152	3273	1284
<u>Area of residence</u>	%	%	%	%	%
Overseas	37	8	35	6	59
London boroughs	45	25	45	56	21
Rest U.K.	18	67	20	33	20

Method of travel, 1985/86

	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	654	708	2215	1433	640
<u>Area of residence</u>	%	%	%	%	%
Overseas	38	9	51	8	60
London boroughs	43	31	33	52	20
Rest U.K.	19	60	16	40	20

Fig 5-22 Distribution of users of the most common methods of travel, by area of residence

Base = bus, train, tube, car and taxi users

Despite the large changes in the number of journeys made by bus and car between 1981/82 and 1985/86, the area of residence profile of users of each of these methods showed only small variations between the two survey periods, with London boroughs residents consistently forming the largest group of users of each of these methods of travel.

Taxi users were also little changed in area of residence

distribution in 1985/86. The majority of taxi journeys were consistently made by overseas visitors.

The majority of train users were from parts of the U.K. outside London, but the percentage who were from London boroughs increased in 1985/86. This is further evidence to support the suggestion that most of the increased attendances among London boroughs residents in 1985/86 had come from residents of the outer rather than the inner London boroughs, since a train journey into central London generally implies a longer distance to travel than does a journey by other methods of public transport. Train journeys by London boroughs residents increased from around 270,000 in 1981/82 to around 340,000 in 1985/86.

London boroughs residents formed the largest group of tube users in 1981/82, but in 1985/86 it was overseas visitors who accounted for the majority of tube users. The number of tube journeys made by overseas visitors increased from around 890,000 in 1981/82 to around 1,900,000 in 1985/86. Overseas visitors accounted for most of the increase in tube journeys among theatre-goers in 1985/86.

The following table shows the distribution of each sex by main methods of travel used for getting to the theatre. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Sex</u>		
	<u>Female</u>	<u>Male</u>
Weighted base	6757 (3177)	4881 (3316)
<u>Method of travel</u>	%	%
Hired coach/minibus	4 (2)	3 (2)
Bus	8 (11)	5 (8)
Train	13 (12)	12 (9)
Tube (underground)	28 (34)	26 (35)
Car	27 (22)	30 (22)
Taxi	10 (9)	12 (11)
Motorbike	* (*)	* (*)
Bicycle	1 (*)	1 (*)
On foot	9 (10)	11 (12)
Other (81/82 only)	* (n/a)	* (n/a)
After show travel		
problems (85/86 only)	n/a (14)	n/a (10)

Fig 5-23 Distribution of each sex, by method of travel to the theatre

*=less than 0.5%

Base = all respondents

Women were consistently more likely than men to travel by bus or train, and less likely to travel by taxi or on foot. Women were more likely than men to say that they had problems with after show travel in 1985/86, and their most common problem was the early departure times of last trains. Men's most common after show travel problem in 1985/86 was finding a taxi.

The following table shows the distribution of users of the five most common methods of travelling to the theatre, excluding walking, by sex.

<u>Method of travel, 1981/82</u>					
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	470	1404	3153	3271	1282
<u>Sex</u>	%	%	%	%	%
Female	67	61	60	55	53
Male	33	39	40	45	47

<u>Method of travel, 1985/86</u>					
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	651	702	2211	1434	641
<u>Sex</u>	%	%	%	%	%
Female	57	56	48	48	42
Male	43	44	52	52	58

Fig 5-24 Distribution of users of the most common methods of travel, by sex

Base = bus, train, tube, car and taxi users

Women consistently formed higher percentages of bus and train users than of the other methods of travel analysed. In 1981/82, women formed the majority of users of each of the five methods of travel analysed; this was due to their numerical prominence in the West End audience as a whole. In 1985/86, they accounted for the majority of bus and

train users. In 1985/86, men formed the majority of users of tube, car and taxi travel. Tube users showed the greatest change in sex distribution in 1985/86, and train users the least change.

The following table shows the distribution of each age group by main methods of travel used for getting to the theatre.

<u>Age Group, 1981/82</u>							
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	918	2095	3138	2331	1737	908	445
<u>Method of travel</u>	%	%	%	%	%	%	%
Hired coach/minibus	16	3	2	3	2	4	2
Bus	6	8	6	6	6	9	12
Train	12	12	11	13	13	14	16
Tube (underground)	22	38	29	22	21	25	27
Car	26	19	31	33	32	27	23
Taxi	11	5	8	15	15	11	13
Motorbike	-	*	1	*	*	-	-
Bicycle	*	1	1	*	*	*	-
On foot	7	14	11	8	10	10	7
Other	-	-	-	-	*	-	-

Fig 5-25 (a) Distribution of each age group, by method of travel to the theatre, 1981/82

* = less than 0.5%

Base= all respondents

Age group, 1985/86

	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	753	1404	1522	1209	760	423	249
<u>Method of travel</u>	%	%	%	%	%	%	%
Hired coach/minibus	5	1	1	1	4	2	4
Bus	17	9	9	7	7	13	15
Train	12	12	10	10	12	13	7
Tube (underground)	38	44	38	29	25	21	19
Car	9	13	22	33	29	26	21
Taxi	7	6	9	12	12	16	20
Motorbike	*	*	*	*	1	-	*
Bicycle	-	*	*	*	-	-	-
On foot	10	14	11	8	10	9	13
After show							
travel problems	20	12	12	10	10	13	13

Fig 5-25 (b) Distribution of each age group by method of travel to the theatre, 1985/86

* = less than 0.5%

Base= all respondents

The car was the most often used method of travel among the 16-18's in 1981/82. Most of this group would have been likely to have been driven to the theatre by parents rather than driving themselves. The number of car journeys made by this age group decreased from around 180,000 in 1981/82 to around 130,000 in 1985/86, when they became the least likely age group to travel by car. The tube became their the most commonly used method of travel to the theatre in

1985/86. This change was probably linked to the large increase in the percentage from overseas among this age group in 1985/86, since young overseas visitors were unlikely to be able to travel to the theatre in a family car. The 16-18's were the most likely age group to travel to the theatre in a hired coach or minibus, in both survey periods, although their use of this method of travel declined in 1985/86, when there was a substantial decrease in the percentage of this age group who were in large parties of 12 or more. This age group made around 110,000 hired coach and minibus journeys to the theatre in 1981/82, and around 65,000 in 1985/86. Their most common after show travel problem in 1985/86 was the infrequency of late buses.

The 19-24's were consistently more likely to travel by tube than by any other method. They were also consistently the most likely age group to have walked to the theatre. Financial reasons may have been an important cause of the high percentage of this age group who walked, but there is also the possibility that they were not as likely to be as bound to a specific timetable as those in older age groups - especially as a high percentage of this age group were full-time students - and would therefore have been able to make a more leisurely journey to the theatre. They were consistently the least likely age group to travel by taxi. Their most common after show travel problem in 1985/86 was the early departure times of last trains.

The 25-34's showed a shift from cars being their most commonly used method of travel in 1981/82 to tube being their most commonly used method in 1985/86. This age group made around 730,000 car journeys to the theatre in 1981/82, and around 560,000 in 1985/86. Their main after show travel problem in 1985/86 was the early departure times of last trains.

The 35-64 age groups consistently travelled to the theatre by car more than by any other method, even when the tube replaced the car as the most commonly used method of travel overall in 1985/86. Use of cars was higher among the 35-44's than among any other age group.

Like the 16-18's, the 65 and overs showed a considerable change in travel methods used between 1981/82 and 1985/86. Tube was their most commonly used method in 1981/82, car in 1985/86. Their use of buses and taxis increased in 1985/86, as did their likelihood of walking to the theatre, and their use of trains decreased. In 1981/82, they had been the age group most likely to travel by train, whereas in 1985/86, when the 55-64's were the most likely age group to travel by train, and the 65 and overs became the least likely age group to do so.

For all the 35 and over age groups, the most common after show travel problem in 1985/86 was finding a taxi.

The following table shows the distribution of users of the five most common methods of travelling to the theatre, excluding walking, by age group.

<u>Method of travel, 1981/82</u>					
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	464	1403	3155	3273	1279
<u>Age group</u>	%	%	%	%	%
16 - 18	6	7	6	7	8
19 - 24	21	17	26	12	9
25 - 34	24	24	29	29	21
35 - 44	17	20	16	23	28
45 - 54	13	16	11	16	20
55 - 64	12	11	8	9	9
65 and over	7	5	4	4	5
Mean age (actual)	38	38	35	37	40

<u>Method of travel, 1985/86</u>					
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	652	702	2214	1432	634
<u>Age group</u>	%	%	%	%	%
16 - 18	20	13	13	5	8
19 - 24	20	25	29	13	13
25 - 34	21	22	27	24	22
35 - 44	14	17	16	30	23
45 - 54	9	13	9	16	15
55 - 64	9	8	4	8	11
65 and over	6	2	2	3	7
Mean age (actual)	33	34	31	38	39

Fig 5-26 Distribution of users of the most common methods of travel, by age group

Base = bus, train, tube, car and taxi users

Tube users had a consistently younger mean age than users of the other four methods of travel analysed. In 1985/86, all the groups of public transport users had a younger mean age than those travelling to the theatre by car or taxi. Taxi users consistently had the oldest mean age of the groups analysed, and train users the oldest mean age of the groups of public transport users. Car users were the only group whose mean age increased in 1985/86.

The largest age group of bus users was consistently the 25-34's.

The 25-34's formed the largest age group of train users in 1981/82, but in 1985/86, the 19-24's were the largest group of train users. The same pattern was found among tube users.

The 25-34's also formed the largest age group of car users in 1981/82, but in 1985/86, with a large decline in the number of car journeys made by this age group, the 35-44's became the largest group of car users.

The 35-44's were consistently the largest group of taxi users.

The following table shows the distribution of each of the four frequency groups of London theatre-going analysed in

section 1 of Chapter 4, by main methods of travel used for getting to the theatre. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Frequency group (London theatre-going)</u>				
<u>New</u>				
	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2544(2009)	2781(1730)	4546(2137)	1735(576)
<u>Method of</u>				
<u>travel</u>	%	%	%	%
Hired coach	6 (2)	6 (2)	2 (2)	1 (*)
Bus	8 (9)	6 (8)	7 (11)	8 (12)
Train	13 (7)	15 (13)	11 (13)	11 (12)
Tube	28 (41)	27 (36)	27 (28)	30 (28)
Car	16 (14)	24 (18)	35 (30)	34 (31)
Taxi	17 (11)	12 (14)	8 (7)	4 (5)
Motorbike	* (*)	* (*)	* (*)	1 (1)
Bicycle	* (-)	* (*)	1 (*)	2 (*)
On foot	12 (15)	10 (9)	9 (8)	9 (10)
Other (81/82)	-(n/a)	*(n/a)	-(n/a)	-(n/a)
After show travel				
problems (85/86)	n/a(9)	n/a(12)	n/a(14)	n/a(14)

Fig 5-27 Distribution of each frequency group, by method of travel to the theatre

*=less than 0.5%

Base = all respondents

New visitors and occasional theatre-goers were consistently

more likely to travel to the theatre by tube than by any other method; frequent and regular theatre-goers were consistently more likely to travel by car than by any other method.

New visitors were consistently the most likely frequency group to travel by tube, or on foot to the theatre. Occasional theatre-goers were consistently the most likely frequency group to travel by train. Frequent theatre-goers were the most likely frequency group to travel by car in 1981/82, regular theatre-goers in 1985/86, although the percentage differences between the two groups use of cars was very small. Regular theatre-goers were consistently the most likely frequency group to travel by bus or by motorcycle or bicycle.

In general, the least frequent theatre-goers made most use of public transport, and the most frequent theatre-goers made most use of private methods of travel. This is just as likely to have reflected the relative lack of access to private means of travel among visitors to London, who formed higher percentages of the least frequent than of the most frequent theatre-goers, as to have reflected a positive preference for private means of travel among the most frequent theatre-goers.

The most common after show travel problems were: new visitors, having a long walk to the car after the

performance because of a lack of parking space near the theatre; occasional theatre-goers, infrequent late bus services; and frequent and regular theatre-goers, early departure times of last trains.

The following table shows the distribution of users of the five most common methods of travelling to the theatre, excluding walking, by frequency of London theatre-going.

<u>Method of travel, 1981/82</u>					
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	461	1404	3149	3272	1272
<u>Visits in previous</u>					
<u>12 months</u>	%	%	%	%	%
This is first visit	23	21	21	12	35
1 other	11	15	12	10	15
2 others	10	14	12	11	13
3 - 6 others	25	26	26	31	22
7 - 11 others	14	9	12	18	8
12 or more others	17	15	17	18	7
Mean frequency					
(actual)	3	3	3	3	2

<u>Method of travel, 1985/86</u>					
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	653	701	2210	1433	633
<u>Visits in previous</u>					
<u>12 months</u>	%	%	%	%	%
This is first visit	30	20	36	19	35
1 other	15	16	16	11	13
2 others	7	14	13	11	24
3 - 6 others	28	30	19	31	20
7 - 11 others	9	10	8	14	4
12 or more others	11	10	8	13	4
Mean frequency					
(actual)	2	3	2	2	2

Fig 5-28 Distribution of users of the most common methods of travel, by frequency of London theatre-going
Base = bus, train, tube, car and taxi users

Mean frequency of London theatre-going decreased among bus, tube and car users in 1985/86, and was stable among train and taxi users. Taxi users had the lowest mean frequency of London theatre-going in 1981/82. Train users had the highest mean frequency of London theatre-going in 1985/86.

In 1981/82, bus and tube users were most likely to fall into the 3-6 other visits category but in 1985/86 they were most likely to be in the first visit frequency category. Car and train users were consistently most likely to fall into the 3-6 other visits frequency category. Taxi users were consistently most likely to fall into the first visit category, supporting the earlier suggestion that a high use of taxis may have been linked to a lack of knowledge of London theatre locations.

(4) Convenience of performance timings in London theatres

Two questions on the convenience of evening performance timings were included in the 1981/82 surveys. Respondents were asked to select, from a range of options, the earliest starting time and latest finishing time that would normally be convenient for them for Monday to Friday evening theatre performances in London. Monday to Friday performances were specified, because convenient timings for Saturday performances were thought to be likely to differ from those on other days of the week for three reasons; a lower percentage of the audience would be in London for work or business reasons on Saturdays, weekend public transport timetables would differ from those for weekday services, and there would not be the same pressure to get home early on an evening that did not precede a normal working day.

The following table shows the findings on convenient performance timings for the overall West End audience. All times given throughout this section are p.m. figures.

Weighted base	11,628		11,621
<u>Earliest convenient</u>		<u>Latest convenient</u>	
<u>starting time</u>	%	<u>finishing time</u>	%
7.00	22	10.00	10
7.30	45	10.15	8
8.00	29	10.30	38
8.30	4	10.45	14
		11.00	30

Fig 5 29 Distribution of the West End audience, by
earliest convenient starting times and latest
convenient finishing times for London theatre
performances, 1981/82

Base = all respondents

In general, early starting times were unlikely to prove a problem for the majority of respondents, and only 33% would find a starting time earlier than 8.00 p.m. inconvenient, while 22% found a starting time as early as 7.00 p.m. convenient. Late finishing times did not present a substantial problem for respondents either, with only 18% saying that a finishing time earlier than 10.30 p.m. would normally be the latest convenient time for them, and as many as 30% saying that an 11.00 p.m. finish would normally be convenient for them. To cater for the convenience of 90% of the existing West End audience in 1981/82, the most suitable performance timings would have been an 8.00 p.m. start and a 10.15 p.m. finish.

The responses to these two questions may not, however, have given a complete picture, since those who found the typical West End performance timings very inconvenient would be unlikely to attend the London theatre anyway, and so could not have taken part in the surveys.

The following tables show: the convenient performance timing for those who giving each of the three main reasons for being in central London on the day of performance, namely, work, holiday, or a special trip to see the performance; and the distribution of theatre-goers, grouped according to those for whom 7.30 p.m. or earlier was the earliest convenient starting time, those for whom 8.00 p.m. or later was the earliest convenient starting time, those for whom 10.30 p.m. or earlier was the latest convenient finishing time, and those for whom 10.45 p.m. or later was the latest convenient finishing time, by their three main reasons for being in central London that day.

	<u>Reason in central London</u>		
	<u>Work</u>	<u>Holiday</u>	<u>Theatre</u>
Weighted base	2657	2542	4418
<u>Earliest convenient</u>			
<u>starting time</u>	%	%	%
7.00	29	18	20
7.30	45	42	46
8.00	23	36	28
8.30	3	4	6
Weighted base	2658	2540	4411
<u>Latest convenient</u>			
<u>finishing time</u>	%	%	%
10.00	8	13	10
10.15	9	7	8
10.30	38	39	39
10.45	15	12	14
11.00	30	29	29

Fig 5-30 Distribution of those giving one of the three main reasons for being in central London, by earliest convenient starting times and latest convenient finishing times for London theatre performances, 1981/82

Base = those who work in central London, are on holiday, or who have come in specially for a theatre visit

	<u>Earliest convenient</u>		<u>Latest convenient</u>	
	<u>starting time</u>		<u>finishing time</u>	
	<u>7.30 or</u>	<u>8.00 or</u>	<u>10.30 or</u>	<u>10.45 or</u>
	<u>earlier</u>	<u>later</u>	<u>earlier</u>	<u>later</u>
Weighted base	7791	3809	6487	5114
<u>Reason in c.London</u>	%	%	%	%
Work, college etc	25	18	22	24
On holiday	20	26	23	20
Theatre visit	38	38	38	38

Fig 5-31 Distribution of the West End audience grouped
by earliest convenient starting times and latest
convenient finishing times, by three main reasons
for being in central London on the day of
performance, 1981/82

Base = all respondents

Those who worked in the central London area were the least likely to be inconvenienced by early starting times of 7.30 p.m. or earlier. Proximity to the theatres during the normal course of the day was evidently more likely to be a factor in early starting times being convenient among those who worked locally than it was among holidaymakers sight-seeing in the central London area. Holidaymakers probably wished to return to their hotel between sight-seeing and going to the performance, whereas those working locally would be likely to come from work to the theatre without going home first. Those working locally were also the least likely group to be inconvenienced by late finishing times

of 10.45 p.m. or later, even though they were likely to have a longer journey after the performance than those on holiday, since many of the latter group would be likely to be staying in centrally located hotels. Regular use of public transport to and from London by those who worked in London may have led them to be less apprehensive about getting home after a performance than were those who were holidaying in London, and so less likely to say that finishing times of 10.45 p.m. or later were inconvenient. Those who worked in London formed a higher percentage of those finding a 7.30 p.m. or earlier start convenient than of those finding it inconvenient, and a lower percentage of those finding a 10.45 p.m. or later finish inconvenient than of those finding it convenient. The situation with holidaymakers was exactly the reverse.

Those who had come into London specially to see the performance were slightly more likely than the other groups to say that an 8.30 p.m. starting time was the earliest that would be convenient for them.

The following table shows the percentage of users of each of the five most common methods of travelling to the theatre, excluding those who walked, who found 8.00 p.m. or later the earliest convenient starting time, and who found 10.30 p.m. or earlier the latest convenient finishing time.

	<u>Method of travel</u>				
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>	<u>Car</u>	<u>Taxi</u>
Weighted base	474	1409	3152	3276	1278
<u>Convenient performance timings</u>	%	%	%	%	%
8.00 or later is earliest convenient starting time	29	27	31	36	44
10.30 or earlier is latest convenient finishing time	55	70	55	49	62

Fig 5-32 Distribution of users of main methods of travel,
by earliest convenient starting and latest
convenient finishing times for London theatre
performances, 1981/82

Base = bus, train, tube, car and taxi users

Public transport users were less likely than those using car or taxi to travel to the theatre to find starting times earlier than 8.00 p.m. inconvenient. Taxi users were the most likely to find a starting time earlier than 8.00 p.m. inconvenient, and they may have travelled by taxi because of pressure of time. Car users were the second most likely group to find starting times earlier than 8.00 p.m. inconvenient, suggesting that they wished to allow time to get through traffic and to find a parking space.

Train travellers were the most likely to find finishing times later than 10.30 p.m. inconvenient, car users least likely. The early departure times of last trains was one of

the most significant travel problems mentioned by respondents, in answer to both the question on general deterrents to London theatre-going, and to that on after-show travel problems. Car users generally found late finishing times more convenient than public transport users did. They would not have had problems with traffic to the same degree on their homeward as on their outward journey.

The following tables show: the convenient performance timings for each area of residence group; and the area of residence distribution of theatre-goers grouped according to convenient performance timings, as in Fig 5-31.

Area of Residence

	<u>London</u>		
	<u>Overseas</u>	<u>boroughs</u>	<u>Rest U.K.</u>
Weighted base	3111	4651	3832
<u>Earliest convenient</u>			
<u>starting time</u>	%	%	%
7.00	20	24	20
7.30	40	48	45
8.00	36	24	30
8.30	4	4	5
Weighted base	3108	4644	3827
<u>Latest convenient</u>			
<u>fini hing time</u>	%	%	%
10.00	13	7	11
10.15	7	8	10
10.30	38	35	41
10.45	12	16	13
11.00	30	34	25

Fig 5-33 Distribution of each area of residence group by earliest convenient starting times and latest convenient finishing times for London theatre performances, 1981/82

	<u>Earliest convenient</u>		<u>Latest convenient</u>	
	<u>starting time</u>		<u>finishing time</u>	
	<u>7.30 or</u>	<u>8.00 or</u>	<u>10.30 or</u>	<u>10.45 or</u>
	<u>earlier</u>	<u>later</u>	<u>earlier</u>	<u>later</u>
Weighted base	7797	3797	6499	5080
<u>Area of residence</u>	%	%	%	%
Overseas	24	32	27	25
London boroughs	44	34	37	46
Rest U.K.	32	34	36	29

Fig 5-34 Distribution of the West End audience, grouped
by earliest convenient starting times and latest
convenient finishing times, by area of residence,
1981/82

Base = all respondents

London boroughs residents were the most likely group to find a 7.30 p.m. or earlier starting time convenient. This was probably connected with the higher percentage of London boroughs residents than of the other area of residence groups who worked in London, and who would therefore already be conveniently located for getting to the theatre. They were the least likely area of residence group to say that a 10.30 p.m. or earlier finish was the latest that would be convenient for them. The proximity of their homes to the theatre area would have been a contributory factor.

Residents of parts of the U.K. other than London boroughs were the most likely group to say that a 10.30 p.m. or

earlier finish was the latest convenient time for them, and this was likely to be linked to the fact that the majority of them would have had a longer journey home after the performance than either overseas visitors or London boroughs residents.

Overseas visitors accounted for a higher percentage of those who had difficulties with a 7.30 p.m. or earlier start than of those who did not. London boroughs residents formed a larger group of those for whom finishing times of 10.45 p.m. or later would be convenient than of those for whom they would be inconvenient. Residents of other parts of the U.K. formed a higher percentage of those finding a finishing time of 10.30 p.m. or earlier the latest convenient, than of those who found a later finishing time convenient.

The following tables show: the convenient performance timings for each sex; and the sex distribution of theatre-goers grouped according to convenient performance timings, as in Fig 5-31.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6751	4871
<u>Earliest convenient</u>		
<u>starting time</u>	%	%
7.00	22	21
7.30	45	45
8.00	29	29
8.30	4	5
Weighted base	6748	4870
<u>Latest convenient</u>		
<u>finishing time</u>	%	%
10.00	10	9
10.15	9	8
10.30	40	35
10.45	14	14
11.00	27	34

Fig 5-35 Distribution of each sex, by earliest convenient starting times and latest convenient finishing times for London theatre performances, 1981/82
Base = all respondents

	<u>Earliest convenient</u>		<u>Latest convenient</u>	
	<u>starting time</u>		<u>finishing time</u>	
	<u>7.30 or</u>	<u>8.00 or</u>	<u>10.30 or</u>	<u>10.45 or</u>
	<u>earlier</u>	<u>later</u>	<u>earlier</u>	<u>later</u>
Weighted base	7792	3830	6489	5129
<u>Sex</u>	%	%	%	%
Female	58	57	61	54
Male	42	43	39	46

Fig 5-36 Distribution of the West End audience grouped
by earliest convenient starting times and latest
convenient finishing times, by sex, 1981/82

Base = all respondents

There was almost no difference between the sexes in the convenience of the listed starting times. Women were, however, more likely than men to find a finishing time later than 10.30 p.m. inconvenient. Although there was no strong evidence from the surveys of women having a fear of violence in London late at night and finding this a major problem or deterrent to London theatre-going, a higher percentage of women than men lived in London and were therefore likely to have a shorter homeward journey than men on average, so that it is probable that it was concern about being out in London late at night which influenced women's finding late finishing times less convenient than men did, rather than the length of their homeward journey.

The tendency of women to find late finishing times less

convenient than men meant that they formed a higher percentage of those finding 10.30 p.m. or earlier the latest convenient finishing time, than of those for whom a 10.45 p.m. or later finish was convenient. There was, however, little difference in the sex distribution of those finding the different starting times convenient.

The following tables show: the convenient performance timings for each age group; and the age distribution of theatre-goers grouped according to convenience of performance timings, as in Fig 5-31.

<u>Age Group</u>							
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
Weighted base	920	2091	3143	2333	1732	900	449
<u>Earliest convenient</u>							
<u>starting time</u>	%	%	%	%	%	%	%
7.00	23	23	22	18	22	22	30
7.30	45	43	44	43	47	48	48
8.00	28	30	29	34	27	27	20
8.30	4	4	5	5	4	3	2
Weighted base	918	2087	3141	2330	1728	898	448
<u>Latest convenient</u>							
<u>finishing time</u>	%	%	%	%	%	%	%
10.00	15	7	9	9	10	12	19
10.15	9	7	8	8	8	11	12
10.30	36	37	37	40	39	39	38
10.45	11	16	13	13	15	14	13
11.00	29	33	33	30	28	24	18

Fig 5-37 Distribution of each age group, by earliest convenient starting times and latest convenient finishing times for London theatre performances 1981/82

Base = all respondents

	<u>Earliest convenient</u>		<u>Latest convenient</u>	
	<u>starting time</u>		<u>finishing time</u>	
	<u>7.30 or</u>	<u>8.00 or</u>	<u>10.30 or</u>	<u>10.45 or</u>
	<u>earlier</u>	<u>later</u>	<u>earlier</u>	<u>later</u>
Weighted base	7791	3797	6487	5063
<u>Age group</u>	%	%	%	%
16 - 18	7	7	8	7
19 - 24	18	19	17	21
25 - 34	27	27	25	28
35 - 44	18	23	20	19
45 - 54	15	13	15	14
56 - 64	10	8	10	8
65 and over	5	3	5	3
Mean age (actual)	37	36	37	35

Fig 5-38 Distribution of the West End audience grouped
by earliest convenient starting times and latest
convenient finishing times, by age group, 1981/82
Base = all respondents

The 45 and over age groups were the most likely to find starting times of 7.30 p.m. or earlier convenient, the 65 and overs especially so. The majority of the 65 and overs were likely to be retired, and therefore would be less likely than other age groups to have demands on their time prior to the theatre visit. The 35-44's were the least likely age group to find a 7.30 p.m. or earlier starting time convenient. This would be the age group most likely to have young children, and they would therefore have the

problem of organising, and perhaps waiting for, a baby-sitter before they could depart for their evening out. The adult audience at children's shows in 1982 had proved to be more likely than average to find starting times of 7.30 p.m. or earlier inconvenient. Of the under 55 age groups, the 16-18's were the most likely to find a 7.30 p.m. or earlier starting time convenient. Many of this age group would be free after finishing school or college classes at an earlier time than would those older groups who were more likely to be in full-time employment.

The 65 and overs were much less likely than any other age group to find finishing times of 10.45 p.m. or later convenient. As with women, this may have been linked to a fear of being out in London late at night, since there would be unlikely to be many of the 65 and over age group who would need to return home early in order to make an early start the following day. After the 65 and overs, the 16-18's were the least likely age group to find a 10.45 p.m. or later finishing time convenient, and this might have been connected with parental restrictions on their time of return.

The mean age of those who found a starting time of 7.30 p.m. or earlier inconvenient was younger than that of those who found it convenient. The mean age of those who found a finishing time of 10.45 p.m. or later inconvenient was older than that of those who found it convenient.

The following tables show: convenient performance timings for each of the frequency groups of London theatre-going analysed in section 1 of Chapter 4; and the distribution of London theatre-going frequency among the audience grouped according to convenient performance timings, as in Fig 5-31.

Frequency group (London theatre-going)

New

Visitors Occasionals Frequent Regulars

Weighted base	2539	2777	4549	1740
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Earliest convenient

<u>starting time</u>	%	%	%	%
7.00	19	18	22	31
7.30	38	42	47	51
8.00	37	35	27	15
8.30	6	5	4	3

Weighted base	2540	2783	4549	1738
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Latest convenient

<u>finishing time</u>	%	%	%	%
10.00	15	12	8	5
10.15	8	8	9	6
10.30	39	42	38	32
10.45	10	12	16	17
11.00	28	26	29	40

Fig 5-39 Distribution of each frequency group, by earliest convenient starting times and latest convenient finishing times for London theatre performances, 1981/82

Base = all respondents

	<u>Earliest convenient</u>		<u>Latest convenient</u>	
	<u>starting time</u>		<u>finishing time</u>	
	<u>7.30 or</u>	<u>8.00 or</u>	<u>10.30 or</u>	<u>10.45 or</u>
	<u>earlier</u>	<u>later</u>	<u>earlier</u>	<u>later</u>
Weighted base	7789	3816	6488	5122
<u>Visits in previous</u>				
<u>12 months</u>	%	%	%	%
This is first visit	18	27	23	19
1 other	11	15	14	10
2 others	11	14	13	10
3 - 6 others	27	26	28	26
7 - 11 others	15	10	11	15
12 or more others	18	8	11	20
Mean frequency				
(actual)	3	2	2	3

Fig 5-40 Distribution of the West End audience grouped
by earliest convenient starting times and latest
convenient finishing times, by frequency of London
theatre-going, 1981/82

Base = all respondents

Regular theatre-goers were much less likely than other frequency groups to be inconvenienced by starting times of 7.30 p.m. or earlier, or by finishing times of 10.45 p.m. or later. This may be partly because a high percentage of regular theatre-goers lived in London, but is also the case that those who had no particular problems with the timing of performances would be more likely to attend the theatre

regularly than those who did. It is not possible to tell from these surveys however, whether the convenience or otherwise of typical starting and finishing times in the West End had been a major influence on frequency of London theatre-going.

New visitors were the most likely to say that starting times of 7.30 p.m. or earlier would be inconvenient for them, and that a finishing time later than 10.15 p.m. would be inconvenient. Although a high percentage of new visitors were on holiday in London, and might therefore be supposed to have fewer pressures dictating convenient timings for both start and finish times of performances, their lack of flexibility about timings compared with other frequency groups may have been a reflection of uncertainties about public transport timings and theatre locations, as they were not experienced London theatre-goers.

Mean frequency of London theatre-going was higher among those who found a 7.30 p.m. or earlier start convenient than among those who did not. The same was true for those who found a 10.45 p.m. or later finish convenient.

(5) Eating out in London on a theatre visit

Two questions on eating out in London as part of the theatre visit were included in both survey periods, each set of questions with a slightly different emphasis. In 1981/82, respondents were asked whether they would normally eat out in London on a theatre visit; and, if so, whether they preferred to eat before or after the performance, or whether they had no preference. In 1985/86, respondents were asked whether they had already eaten out, or planned to eat out, in London that day in conjunction with their theatre visit; and whether they would normally eat out in London in conjunction with a theatre visit before or after the performance, or whether they would not normally eat out.

The following table shows the findings on eating out.

	<u>1981/82</u>
Weighted base	11619
<u>Normally eat out</u>	%
Yes	71
No	29

Weighted base	8221
<u>If yes, when preferred</u>	%
Before performance	52
After performance	31
No preference	17

	<u>1985/86</u>
Weighted base	6427
<u>Eat out today</u>	%
Have already done so	52
Will do afterwards	23
No plans to eat out	25

Weighted base	6385
<u>Normally eat out</u>	%
Yes before performance	52
Yes after performance	27
No	21

Fig 5-41 Distribution of the West End audience by patterns of eating out in conjunction with a London theatre visit

Base=all respondents, except for when preferred in 1981/82, for which the base is those who normally eat out

71% of respondents in 1981/82 and 79% in 1985/86 claimed that they would normally eat out in London in conjunction with the theatre visit. 75% in 1985/86 said that they had already done so, or planned to do so, so that the actual level of eating out that day was a little lower than was claimed to be the normal situation. The number of food/restaurant purchases made by theatre-goers while eating out in conjunction with their theatre visit can be estimated at around 6.2 million in 1981/82 and around 8.0 million in 1985/86.

In 1981/82, eating before the performance was more popular than eating afterwards. Of those who did normally eat out, 52% said they preferred to eat before the performance, 31% afterwards, and 17% had no preference. These figures are equivalent to 63% of those who ate out, and who expressed a preference, preferring to eat beforehand, and 37% preferring to eat afterwards. The different emphasis of the 1985/86 questions means that precise comparisons on preferred times for eating out cannot be made with 1981/82, since in 1985/86 respondents were asked what they had done that day and what they normally did, rather than what they preferred to do, but eating beforehand proved to be more common than eating afterwards in 1985/86, both normally and on the day of performance. Of those who had, or planned to, eat out that day in 1985/86, 69% had already eaten before the performance, and 31% planned to eat afterwards. Of those who said they normally ate out, 66% said they would normally eat before and 34% afterwards.

Eating out in London would cover a wide range of options from fast food or sandwich bars, through wine bars and bistros to full restaurant meals. The 1985/86 surveys included a question on expenditure on eating out as one of the set of general questions on expenditure associated with the theatre visit. The mean expenditure on eating out per person among those who claimed to spend something was £8.15 per head, and it was therefore evident that eating out in London in conjunction with the theatre visit in 1985/86 did not mean a full-scale restaurant meal for most people.

The following tables show: the findings on eating out patterns in conjunction with the theatre visit for each area of residence group; and the area of residence distribution of those who said they would normally eat out in London in 1981/82 and 1985/86, of those in 1981/82 who said they preferred to eat before and after, and of those in 1985/86 who said they normally ate before or after. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Area of Residence</u>		
		<u>London</u>	
<u>1981/82</u>	<u>Overseas</u>	<u>boroughs</u>	<u>Rest U.K.</u>
Weighted base	3119	4650	3833
<u>Normally eat out</u>	%	%	%
Yes	83	59	76
No	17	41	24
Weighted base	2590	2720	2907
<u>If yes, when preferred</u>	%	%	%
Before performance	52	50	54
After performance	31	34	29
No preference	17	16	17
<u>1985/86</u>			
Weighted base	2377	2389	1654
<u>Eat out today</u>	%	%	%
Have already	61	38	59
Will do afterwards	27	20	21
No plans to eat out	12	42	20
Weighted base	2370	2365	1636
<u>Normally eat out</u>	%	%	%
Yes before performance	62	39	57
Yes after performance	26	30	25
No	12	31	18

Fig 5-42 Distribution of each area of residence group, by patterns of eating out in conjunction with a London theatre visit

Base=all respondents, except for when preferred in 1981/82, for which the base is those who normally eat out

	<u>Normally eat out</u>		<u>Preferred/normal time eat out⁽⁴⁾</u>	
	<u>Yes</u>	<u>No</u>	<u>Before</u>	<u>After</u>
Weighted base	8260(4951)	3342(1421)	4250(3318)	2570(1720)
<u>Area of residence</u>	%	%	%	%
Overseas	31 (43)	17 (19)	31 (41)	31 (33)
London boroughs	34 (26)	57 (55)	33 (27)	37 (40)
Rest U.K.	35 (31)	26 (26)	36 (32)	32 (27)

Fig 5-43 Distribution of the West End audience grouped according to patterns of eating out, by area of residence

Bases: normally eat out = all respondents;

Preferred/normal time eat out = all who normally eat out and who expressed a preference in 1981/82, all who normally eat out in 1985/86

All area of residence groups were more likely to claim they normally ate out in London in conjunction with a London theatre visit in 1985/86 than they were in 1981/82.

Overseas visitors were the most likely area of residence group to say they would normally eat out on a London theatre visit, or that they had, or planned to, do so that day, and London boroughs residents least likely to do so. Overseas visitors would be more likely than local residents to find it essential to eat out in London, since the majority of them were unlikely to have access to self-

catering facilities.

In 1981/82, residents of the U.K. outside London formed the largest group of those who normally ate out, but in 1985/86, owing to a large increase in the numbers of overseas visitors, the latter formed the largest group of those who normally ate out. London boroughs residents accounted for the majority of those who did not eat out in both survey periods, and there was only minimal change in the area of residence profile of those who did not eat out in 1985/86.

London boroughs residents were the most likely group to express a preference for eating after the performance, or to say that they normally did so. They consistently formed the largest group of those who preferred to eat after the performance.

The following tables show: the findings on eating out patterns for each sex; and the sex distribution of theatre-goers grouped according to eating out patterns, as in in Fig 5-43.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
<u>1981/82</u>		
Weighted base	6746	4864
<u>Normally eat out</u>	%	%
Yes	69	73
No	31	27
Weighted base	4648	3570
<u>If yes, when preferred</u>	%	%
Before performance	54	49
After performance	28	35
No preference	18	16
<u>1985/86</u>		
Weighted base	3108	3305
<u>Eat out today</u>	%	%
Have already	49	54
Will do afterwards	19	26
No plans to eat out	32	20
Weighted base	3089	3262
<u>Normally eat out</u>	%	%
Yes beforehand	51	52
Yes afterwards	25	30
No	24	18

Fig 5-44 Distribution of each sex, by patterns of eating out in conjunction with a London theatre visit

Base=all respondents, except for when preferred in 1981/82, for which the base is those who normally eat out

	<u>Normally eat out</u>		<u>Preferred/normal time eat out</u>	
	<u>Yes</u>	<u>No</u>	<u>Before</u>	<u>After</u>
Weighted base	8251(4944)	3359(1407)	4242(3288)	2578(1729)
<u>Sex</u>	%	%	%	%
Female	56 (47)	61 (56)	59 (49)	51 (44)
Male	44 (53)	39 (44)	41 (51)	49 (56)

Fig 5-45 Distribution of the West End audience grouped according to patterns of eating out, by sex

Bases: normally eat out = all respondents;

Preferred/normal time eat out = all who normally eat out and who expressed a preference in 1981/82, all who normally eat out in 1985/86

Women were less likely than men to say that they normally ate out on a London theatre visit, especially in 1985/86, and less likely to say they would prefer to, or would normally, eat after a performance. This latter result may have been related to a reluctance among women to be out in London late at night. Women consistently accounted for the majority of those who did not normally eat out in conjunction with the theatre visit. They also consistently accounted for a higher percentage of those who preferred to eat before a performance than of those who preferred to eat afterwards.

The following tables show: the findings on eating out patterns for each age group; and the age distribution of

theatre-goers grouped by eating out patterns, as in Fig 5-43.

	<u>Age Group</u>						
	<u>16-18</u>	<u>19-24</u>	<u>25-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+</u>
<u>1981/82</u>							
Weighted base	920	2091	3137	2328	1724	900	446
<u>Normally eat out</u>	%	%	%	%	%	%	%
Yes	60	66	75	74	74	73	63
No	40	34	25	26	26	27	37
Weighted base	555	1389	2337	1719	1272	655	288
<u>If yes, when prefer</u>	%	%	%	%	%	%	%
Before performance	48	53	48	45	56	66	68
After performance	23	27	33	40	30	25	23
No preference	29	20	19	15	14	9	9
<u>1985/86</u>							
Weighted base	754	1408	1527	1207	761	428	251
<u>Eat out today</u>	%	%	%	%	%	%	%
Have already	51	52	51	48	55	60	54
Will do afterwards	21	17	24	30	22	19	19
No plans to eat out	28	31	25	22	23	21	27
Weighted base	749	1403	1526	1204	760	424	250
<u>Normally eat out</u>	%	%	%	%	%	%	%
Yes beforehand	52	47	54	46	56	65	55
Yes afterwards	29	23	28	34	27	18	23
No	19	30	18	20	17	17	22

Fig 5-46 Distribution of each age group, by patterns of eating out in conjunction with a London theatre visit

Base=all respondents, except for when preferred in 1981/82, for which the base is those who normally eat out

	<u>Normally eat out</u>		<u>Preferred/normal time eat out</u>	
	<u>Yes</u>	<u>No</u>	<u>Before</u>	<u>After</u>
Weighted base	8253(4946)	3293(1370)	4242(3269)	2576(1721)
<u>Age group</u>	%	%	%	%
16 - 18	6 (11)	10 (10)	6 (11)	5 (12)
19 - 24	17 (23)	22 (32)	17 (20)	15 (19)
25 - 34	28 (24)	23 (21)	26 (26)	29 (25)
35 - 44	20 (18)	18 (19)	17 (18)	26 (25)
45 - 54	15 (13)	13 (9)	17 (13)	15 (12)
55 - 64	10 (8)	9 (5)	12 (8)	7 (4)
65 and over	4 (3)	5 (4)	5 (4)	3 (3)
Mean age				
(actual)	36 (34)	36 (33)	38 (35)	37 (34)

Fig 5-47 Distribution of the West End audience grouped according to patterns of eating out, by age group

Bases: normally eat out = all respondents;

Preferred/normal time eat out = all who normally eat out and who expressed a preference in 1981/82, all who normally eat out in 1985/86

In 1981/82, the 25-34's were the most likely age group to say that they normally ate out in conjunction with a London theatre visit. In 1985/86 the 45-64 age groups were slightly more likely to say this was the case than the 25-34's were. The 16-18's in 1981/82, and the 19-24's in 1985/86, were the least likely age groups to say that they normally ate out on a London theatre visit. Financial

considerations may have played a part in the low likelihood of eating out among the youngest age groups. The 65 and overs were, in both survey periods, the second least likely age group to say that they normally ate out. Financial considerations may also have contributed to this age group's low likelihood of eating out, as well as a desire not to be out in London late at night. In 1985/86, the mean age of those who normally ate out was older than that of those who did not. Those who did not normally eat out in conjunction with a London theatre visit were more likely to be aged under 25 than those who did.

The 45 and over age groups showed a more marked preference for eating before the performance than did the under 45 age groups. The 35-44's were the most likely age group to prefer to eat afterwards. The mean age of those who preferred to, or who normally ate after the performance, was younger than that of those who preferred to, or who normally ate beforehand. Those who preferred to eat afterwards contained a smaller percentage of 55 and overs than did those who preferred to eat before.

The following tables show: the findings on eating out patterns for each of the four frequency groups of London theatre-going analysed in section 1 of Chapter 4; and the London theatre-going frequency distribution of theatre-goers grouped by eating out patterns, as in Fig 5-43.

Frequency group (London theatre-going)

New visitors Occasionals Frequent Regulars

1981/82

Weighted base	2542	2789	4547	1737
<u>Normally eat out</u>	%	%	%	%
Yes	80	74	68	58
No	20	26	32	42

Weighted base	2034	2059	3095	1001
<u>If yes, when preferred</u>	%	%	%	%
Before performance	54	51	50	55
After performance	30	31	33	30
No preference	16	18	17	15

1985/86

Weighted base	2002	1728	2127	565
<u>Eat out today</u>	%	%	%	%
Have already	59	52	48	41
Will do afterwards	25	25	20	22
No plans to eat out	16	23	32	37

Weighted base	2004	1722	2110	544
<u>Normally eat out</u>	%	%	%	%
Yes beforehand	58	54	47	45
Yes afterwards	27	28	28	27
No	15	18	25	28

Fig 5-48 Distribution of each frequency group, by patterns of eating out in conjunction with a London theatre visit

Base=all respondents, except for when preferred in 1981/82, for which the base is those who normally eat out

				<u>Preferred/normal time</u>					
<u>Normally eat out</u>				<u>eat out</u>					
<u>Yes</u>				<u>No</u>					
<u>Before</u>				<u>After</u>					
Weighted base		8260(4947)		3355(1431)		4240(3308)		2557(1732)	
<u>Visits in previous</u>									
<u>12 months</u>		<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>	
This is first									
visit		24 (35)		14 (21)		25 (32)		23 (28)	
1 other		13 (14)		10 (14)		13 (13)		14 (18)	
2 others		12 (13)		11 (11)		12 (15)		12 (10)	
3 - 6 others		27 (23)		27 (28)		25 (23)		28 (24)	
7 - 11 others		12 (8)		16 (14)		12 (8)		12 (11)	
12 + others		12 (7)		22 (12)		13 (9)		11 (9)	
Mean frequency									
(actual)		2 (2)		3 (3)		2 (2)		2 (2)	

Fig 5-49 Distribution of the West End audience grouped according to patterns of eating out, by frequency of London theatre-going

Bases: normally eat out = all respondents;

Preferred/normal time eat out=all who normally eat out and who expressed a preference in 1981/82, all who normally eat out in 1985/86

The question on what respondents normally did may have been difficult for new visitors to answer, as it is possible that many of them had never been to London theatres at all apart from the performance surveyed. It is reasonable to assume, however, that in answering questions about what they would normally do, new visitors referred

either to what they had done more than 12 months ago or to what they would be likely to do on future visits.

Likelihood of normally eating out in London in conjunction with the theatre visit was related to frequency of London theatre-going, with new visitors being the most likely group to say that they would normally eat out, and regulars least likely. The high percentage of regular theatre-goers who lived locally and who would therefore have been able to eat at home before the performance may have partly accounted for the lower incidence of eating out among this group, but even when London boroughs residents were analysed on their own as a group, the pattern of a low frequency of London theatre-going being linked with a high likelihood of eating out, and vice versa, was consistent within this area of residence group. It may be that those who visit the London theatre only occasionally are more inclined to make it a special occasion, with a meal out included in their visit, even if they live nearby, than are those who visit the London theatre regularly. Those who normally ate out on a London theatre visit had a consistently lower mean frequency of London theatre-going than those who did not.

There was no marked relationship between frequency of London theatre-going and preferred timings for eating out in 1981/82, although in 1985/86, the less frequent the theatre-goer, the more likely they were to have eaten before the performance, and to say that was when they would

normally do so. The differences in the distribution of London theatre-going frequency between those who preferred to eat before and those who preferred to eat after were, however, quite small.

Notes to Chapter 5

- (1) See note (3), Chapter 2, for details of the method used to calculate mean age.
- (2) See note (4), Chapter 2, for details of the method used to calculate mean frequency of London theatre-going.
- (3) It should be borne in mind when reading this section that the surveys did not include those theatre-goers who were aged under 16, and therefore the overall effect of the teachers' industrial action on the West End is likely to have been underestimated in this study.
- (4) Note that in the case of figures for eating before or after the performance the bases for 1981/82 are those who said they preferred to eat before or after, with those with no preference or who did not eat out excluded, whereas in 1985/86, the bases are those who said they normally ate before or after the performance, with only those who said they did not normally eat out excluded. In 1985/86, therefore, the base figure is for a higher percentage of total respondents, since they were not offered the option of specifying that they ate out normally but had no preference as to when.

The fore-going note applies to all tables in this

section which analyse those who preferred to, or who normally, ate out before or after a performance.