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CHAPTER 6 BOOKING AND PAYING FOR WEST END THEATRE TICKETS

(1) Booking methods

The following table shows the distribution of booking methods used for the performance surveyed. The estimated number of sales⁽¹⁾ in each survey period that were accounted for by each of these booking methods follows in brackets.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11650	6497
	% sales	% sales
<u>Booking method</u>	(millions)	(millions)
Theatre box-office in person	34 (3.0)	41 (4.3)
Theatre box-office by phone	22 (1.9)	25 (2.7)
Theatre box-office by post	9 (0.8)	5 (0.5)
Ticket agency (inc. hotel)	17 (1.5)	16 (1.7)
Leicester Square booth	4 (0.3)	4 (0.4)
Inclusive package	3 (0.3)	4 (0.4)
Someone else booked	2 (0.2)	2 (0.2)
Other (including	.	.
complimentary)	9 (0.8)	3 (0.3)

Fig 6-1 Distribution of the West End audience, by booking methods used for the performance surveyed

Base = all respondents

Booking in person at the theatre box-office was the method most commonly used in both survey periods. Its importance

increased in 1985/86, both as a percentage of total sales and in actual sales made by this method, the latter increasing by around 1.3 million, or 43%, in 1985/86. This increase was probably connected with the increased percentage of the audience who were already in London on the day of performance in 1985/86, and who could therefore conveniently visit the theatre box-office in person.

Telephone booking to the box-office was the second most commonly used booking method in both survey periods. Sales made by this method increased by almost exactly the same percentage as personal booking at the box-office in 1985/86, by 42%, an increase of around 0.8 million in the actual number of sales made by this method.

Agency bookings came third in importance in both survey periods, accounting for roughly the same percentage of sales in both survey periods. There was, however, a much smaller increase in 1985/86 in actual sales made by this method than by either personal or phone booking to the box-office, of around 0.2 million, or 13%.

In 1981/82, respondents who booked at agencies were asked to make a distinction between bookings made at an agency overseas, a hotel desk/porter, or at another form of specialist ticket agency in the U.K.. The majority of agency sales proved to have been made at a specialist agency in the U.K. These accounted for 76% of agency sales,

hotel desks for 18%, and agencies overseas for 6%. In 1985/86, a more detailed breakdown was requested from respondents who had booked at agencies; they were asked to specify whether the agency they used was overseas or in the U.K., and if in the U.K. to give the name of the agency, and to state whether the tickets had been obtained in person, by phone, or by post to the agency. 6% of agency sales had been made at overseas agencies, the same percentage of the total as in 1981/82. Hotel desks accounted for a further 12% of agency sales, a fall of around 60,000 sales made in this way compared with 1981/82. The remaining 82% of total agency sales in 1985/86 was made up of 6% at travel agents, 12% at department stores and 64% at other specialised agencies. 80% of bookings at U.K. agencies were made by personal visit, and 20% by telephone, and there were no reported postal bookings to U.K. agencies. 40% of users of U.K. agencies could not remember the name of the agency they had used, and in general, only those agencies that were the largest and best known were mentioned by name. The most often mentioned of the U.K. specialist agencies were; Keith Prowse and Edwards and Edwards for personal bookings, Keith Prowse and First Call for telephone bookings, and Harrods for department store agencies. A full list of U.K. agencies named by respondents in 1985/86, including department stores, and travel agents, is given in Appendix 9.

Booking by post to the theatre box-office was the fourth most commonly used method in both survey periods, and the

least often used of the methods of booking at the theatre box-office. It was the only one of the major booking methods used to decline in importance in 1985/86, when sales made by this method decreased by around 0.3 million, or 38%.

The half-price ticket booth in Leicester Square⁽²⁾ was the fifth most commonly used method of booking in both survey periods, and accounted for around 4% of sales in both survey periods. The surveys produced figures of around 335,000 sales in 1981/82 and 395,000 in 1985/86 made at Leicester Square booth. Actual booth sales recorded by SWET totalled approximately 322,000 for the calendar year 1982, and for the closest 52 week period to the 1985/86 survey period, around 381,000.⁽³⁾ This is a confirmation of the accuracy of the survey findings. Sales at the booth increased by around 18% in 1985/86, a fairly modest rise in comparison with the rise in bookings direct to the theatre box-office. The way in which booth sales were spread over the individual productions surveyed showed some variation between the two survey periods. In 1981/82, the majority of productions surveyed had sent tickets to the booth, and the percentage of sales for the performance surveyed which were accounted for by the booth was typically in the 2% - 8% range for most individual productions. In 1985/86, however, the situation was much more polarised, with a number of the productions surveyed sending no tickets to the booth, while others did a large percentage of their business for the performance surveyed through the booth, up

to 25% of sales in some cases. Aggregated over the West End as a whole, however, the global picture for booth sales was very similar in both survey periods.

The 1981/82 surveys included additional questions about the booth. Respondents were asked whether they were aware of the existence of the booth, and whether they had used it in the past to buy tickets for West End performances. 55% had heard of the booth, and of them, 24% had used it in the past. This is equivalent to 13% of the total West End audience having heard of and used the booth in the past, compared with an average 4% using it to book for the performance surveyed. Since the majority of productions surveyed in 1981/82 had tickets available at the booth for the performance surveyed, this indicates that booth users did not book at the booth for all their West End theatre visits.

Inclusive package bookings, made as part of a holiday, travel, accommodation or restaurant package, were the sixth most commonly used method of booking in 1981/82, and tied for fifth place with bookings at Leicester Square booth in 1985/86. The number of package bookings increased by around 0.1 million in 1985/86. Those booking by this method were much more likely than those booking by other methods to be part of a large group of 12 or more. 38% of package bookers in 1981/82 and 21% in 1985/86 were part of a large group. They were also more likely than those booking by other methods to be full-time students. 29% of

package bookers in 1981/82 and 45% in 1985/86 were full-time students.

Excluding those who had had arrangements made for them as part of a packaged booking, 2% of the overall audience in both survey periods said that someone else had booked their tickets, and this type of booking accounted for around 200,000 sales in both survey periods. In many of these cases, the person booking would have been a group organiser. No special category was allocated in the question on booking methods for group bookings as such, since a group booking could have been made by any of the methods already mentioned (except at the half-price booth, at which a maximum of four tickets per applicant can be obtained). Group bookings were classified according to the actual means by which the group organiser had obtained the tickets. Those few respondents who said theirs was a group booking, without giving details of the method used by the group organiser to obtain the tickets, were classified as "someone else booked".

Other booking methods mentioned, each of which accounted for less than 2% of total sales in both survey periods, were; complimentary tickets, often being provided to groups such as nurses in a regular block allocation; subscription booking and Youth and Music schemes, (both of these only relevant at the opera productions surveyed); Prestel; ticket touts; and company ticket schemes. Several of these methods could in fact have been covered by one of the major

categories already mentioned e.g. subscription bookings were probably made to the theatre box-office by post.

Problems with booking were not a significant deterrent to London theatre-going among the audiences surveyed. Of those who answered the question on deterrents to London theatre-going, only 3% in 1981/82 and 2% in 1985/86 mentioned some kind of booking problem as a deterrent. The most often mentioned problems were; box-office telephones being engaged, rude box-office staff, limited ticket availability for popular shows, a lack of up to date information on which shows were likely to be sold out, and agency surcharges on tickets.

The following table shows the distribution of each area of residence group by their use of the six main booking methods. 1981/82 figures are given first, 1985/86 figures follow, in brackets.

	<u>Area of residence</u>					
			<u>London</u>		<u>Rest</u>	
	<u>Overseas</u>		<u>Boroughs</u>		<u>U.K.</u>	
Weighted base	3111 (2393)		4670 (2395)		3851 (1679)	
<u>Booking method</u>	%		%		%	
Box office in person	38	(44)	36	(44)	29	(29)
Box office by phone	10	(12)	25	(30)	28	(36)
Box office by post	1	(1)	13	(6)	10	(8)
Ticket agency	32	(23)	10	(10)	15	(13)
Leicester Sq. booth	7	(7)	3	(2)	4	(5)
Inclusive package	5	(10)	*	(1)	5	(2)

Fig 6-2 Distribution of each area of residence group,
by main booking methods used

* = less than 0.5%

Base = all respondents

Overseas visitors and London boroughs residents consistently used personal booking to the theatre box-office more often than any other method, and the percentage of bookings by both these groups which were made at the theatre box-office in person increased in 1985/86. Residents of other parts of the U.K. were almost equally as likely to book by phone to the box-office as they were to book in person in 1981/82, and in 1985/86, they booked more often by phone to the box-office than in person.

Most of the new business among overseas visitors in 1985/86

was transacted in person at the theatre box-office, with sales to personal bookers from overseas increasing from around 0.8 million in 1981/82, to around 1.7 million in 1985/86. Overseas visitors were by far the most likely area of residence group to use ticket agencies. Although the percentage of overseas visitors who had used agencies decreased in 1985/86, actual sales to overseas visitors at agencies showed an increase, from around 750,000 in 1981/82 to around 900,000 in 1985/86. Inclusive package bookings by overseas visitors, while remaining fairly modest as a percentage of total sales to overseas visitors, almost trebled to around 350,000 in 1985/86, compared with around 120,000 in 1981/82. Overseas visitors were also the most likely area of residence group to use the Leicester Square booth, and booth sales to overseas visitors increased from around 150,000 in 1981/82, to around 260,000 in 1985/86.

London boroughs residents showed a larger percentage swing towards booking in person at the box-office than did overseas visitors in 1985/86. This was in spite of the fact that a lower percentage of London boroughs residents worked in London in 1985/86 than in 1981/82, and a higher percentage had come in specially to see the performance, so that fewer of them were in London already on the day of performance. London boroughs residents were the least likely area of residence group to use ticket agencies or the Leicester Square booth. They were the most likely group to book by post to the theatre box-office in 1981/82, when they made around 480,000 postal bookings to the box-

office, but their use of postal booking declined to around 240,000 bookings in 1985/86. Other U.K. residents were more likely than London boroughs residents to book by post to the theatre box-office in 1985/86.

Residents of the U.K. outside London were the most likely area of residence group to book by phone to the box-office, and in 1985/86, phone booking to the box-office was the most commonly used booking method among this group. This is a convenient method for those who do not normally come into London during the day. This group made around 0.8 million bookings by phone to the box-office in 1981/82, and around 1.0 million in 1985/86.

The following table shows the area of residence distribution of users of each of the six main booking methods.

Booking Method, 1981/82

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	3960	2553	1045	1975	471	341
<u>Area of residence</u>	%	%	%	%	%	%
Overseas	30	12	2	50	46	43
London boroughs	43	46	61	22	28	5
Rest U.K.	27	42	37	28	26	52

Booking Method, 1985/86

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	2657	1625	318	1051	248	260
<u>Area of residence</u>	%	%	%	%	%	%
Overseas	40	17	7	53	65	81
London boroughs	40	43	48	25	13	7
Rest U.K.	20	40	45	22	22	12

Fig 6-3 Distribution of users of main booking methods, by area of residence

Base = all those who booked at the box-office in person, by phone, or by post, at agencies, at Leicester Square booth, or through an inclusive package.

In 1981/82, London boroughs residents formed the largest group of those who booked at the box-office in person, but in 1985/86, overseas visitors made about the same number of bookings by this method as London boroughs residents did.

Only a small percentage of those using the other methods of buying tickets through the box-office, by phone or by post, were from overseas, although sales to overseas visitors by both methods did increase in 1985/86. London boroughs residents formed the largest group of those who booked by phone to the box-office, although the number of sales to the rest U.K. group which were made by phone to the box-office was not much smaller. In 1981/82, London boroughs residents accounted for the majority of postal bookings to the box-office, but in 1985/86, although London boroughs residents remained the largest group of those who booked by post to the box-office, the rest U.K. group accounted for almost as high a percentage of postal bookings as London boroughs residents did.

Overseas visitors formed the largest group of agency users in both survey periods, the majority in 1985/86.

Overseas visitors also formed the largest group of users of Leicester Square booth, and the majority of booth sales in 1985/86 were made to overseas visitors, with a marked decline in the percentage of booth sales which were accounted for by London boroughs residents. Sales to

London boroughs residents at the booth declined from around 95,000 in 1981/82 to around 50,000 in 1985/86.

In 1981/82, the rest U.K. group accounted for the majority of packaged bookings, but in 1985/86, when inclusive packaged sales to overseas visitors showed a large increase, overseas visitors accounted for the great majority of inclusive package sales.

The following tables show the distribution of each sex by their use of the six main booking methods, and the distribution by sex of users of each of these booking methods. 1981/82 figures are given first, 1985/86 figures follow in brackets in the first of the two tables.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6761 (3194)	4884 (3318)
<u>Booking method</u>	%	%
Box office in person	32 (42)	38 (42)
Box office by phone	22 (28)	22 (23)
Box office by post	10 (6)	7 (5)
Ticket agency	17 (12)	19 (17)
Leicester Sq. booth	4 (4)	5 (4)
Inclusive package	4 (4)	2 (4)

Fig 6-4 Distribution of each sex, by main booking methods used

Base = all respondents

Booking Method, 1981/82

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
	<u>Person</u>	<u>Phone</u>	<u>Post</u>			
Weighted base	3951	2547	1027	1971	472	328
<u>Sex</u>	%	%	%	%	%	%
Female	54	59	68	56	53	75
Male	46	41	32	44	47	25

Booking Method, 1985/86

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
	<u>Person</u>	<u>Phone</u>	<u>Post</u>			
Weighted base	2554	1611	309	1037	238	254
<u>Sex</u>	%	%	%	%	%	%
Female	48	54	55	42	47	47
Male	52	46	45	58	53	53

Fig 6-5 Distribution of users of main booking methods,
by sex

Base = all those who booked at the box-office in person, by phone, or by post, at agencies, at Leicester Square booth, or through an inclusive package.

Women were consistently more likely to use postal booking to the box-office than men were. Men were consistently more likely than women to book at a ticket agency. Women

were less likely than men to book at the theatre box-office in person in 1981/82, though not in 1985/86, when both sexes increased their use of the theatre box-office for personal booking. Women were more likely than men to book at the theatre box-office by phone in 1985/86. In 1981/82, men were more likely than women to use Leicester Square booth, but in 1985/86, both sexes were equally likely to do so. In 1981/82, women were more likely than men to use an inclusive packaged booking, but in 1985/86, while the percentage of bookings by women which were made through an inclusive package remained stable, the percentage of men who used an inclusive package increased. Women made around 210,000 package bookings in 1981/82 and this level of bookings decreased by a small amount in 1985/86 to around 190,000, while package bookings by men increased from around only 75,000 in 1981/82 to around 220,000 in 1985/86.

In 1981/82, women formed the majority of users of each of the main booking methods, and they predominated most among those using an inclusive packaged booking and among those booking by post to the box-office. In 1985/86, when the percentage of the West End audience who were male was greater than the percentage who were female, women still formed the majority of those booking at the box-office by post or by telephone, whereas men formed the majority of those booking by the other major methods analysed.

The following table shows the distribution of each age group by their use of the six main booking methods.

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	927	2100	3147	2333	1741	911	452
<u>Booking method</u>	%	%	%	%	%	%	%
B.office in person	25	41	33	31	34	38	44
Box office by phone	22	20	24	23	22	20	16
Box office by post	2	6	10	9	9	10	10
Ticket agency	17	13	17	23	19	16	19
Leicester Sq. booth	2	6	5	3	6	7	4
Inclusive package	5	2	2	4	2	3	1

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	765	1417	1538	1288	770	438	252
<u>Booking method</u>	%	%	%	%	%	%	%
B.office in person	42	64	39	32	31	32	30
Box office by phone	25	14	31	32	28	21	21
Box office by post	6	2	4	7	8	8	6
Ticket agency	14	9	10	19	23	22	16
Leicester Sq. booth	4	4	5	3	5	7	8
Inclusive package	7	3	4	4	3	7	11

Fig 6-6 Distribution of each age group, by main booking methods used

Base = all respondents

All age groups used personal booking at the box-office more than any other method in 1981/82, and all except the 35-44's did so in 1985/86; this age group were equally likely to book by telephone or in person at the box-office in 1985/86. The percentage of bookings made in person at the theatre box-office increased among all the under 45 age groups in 1985/86, and decreased among the 45 and over age groups.

In 1981/82, the 16-18's were the most likely age group to have obtained their tickets as part of an inclusive package; presumably many of them would be on an organised educational outing. They were the least likely age group to book at the box-office in person in 1981/82, but there was a shift towards increased use of the box-office for personal booking among this age group in 1985/86.

The 19-24's were consistently among the most likely age groups to book at the box-office in person, and the great majority of new business among the 19-24's in 1985/86 was transacted at the box-office in person. The majority of sales to the 19-24's in 1985/86 were made at the box-office in person. They were the only age group in either of the survey periods to make more than half their bookings by any one booking method.

In 1981/82, the 25-34's were the most likely age group to book at the box-office by telephone. In 1981/82, jointly

with the 55-64's and 65 and overs, they were also the most likely age group to use postal booking to the box-office but in 1985/86, the percentage of this age group who used postal booking fell to the second lowest. Postal bookings to the box-office by this age group decreased from around 240,000 in 1981/82 to around 90,000 in 1985/86.

In 1981/82, the 35-44's were the most likely age group to book at a ticket agency. In 1985/86, it was the 45-54's. Use of agencies increased as a percentage of sales among the 45-54's and 55-64's in 1985/85, while declining among all other age groups.

The 55-64's were consistently among the most likely age groups to book by post to the theatre box-office. In 1985/86, they were the most likely age group to book at Leicester Square booth.

The 65 and overs changed from being the most likely age group to book in person at the theatre box-office in 1981/82 to being the least likely to do so in 1985/86. Personal bookings at the box-office by this age group decreased from around 160,000 in 1981/82 to around 120,000 in 1985/86. In 1985/86 they were the most likely age group to book at Leicester Square booth or to have obtained their tickets as part of an inclusive package, and they showed the largest percentage increase in inclusive packaged bookings of any age group. They made around 5,000 package

bookings in 1981/82 and around 40,000 in 1985/86.

The following table shows the age distribution of users of each of the six main booking methods.

Booking Method, 1981/82

	<u>Box office:</u>			<u>Agency</u>	<u>Booth</u>	<u>Package</u>
	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>			
Weighted base	3947	2539	1011	1968	470	321
<u>Age group</u>	%	%	%	%	%	%
16 - 18	5	7	6	7	4	13
19 - 24	22	17	13	14	21	13
25 - 34	26	29	31	27	29	22
35 - 44	18	21	20	25	13	29
45 - 54	14	15	14	15	18	11
55 - 64	10	8	11	8	13	10
65 and over	5	3	5	4	2	2
Mean age						
(actual) (4)	37	35	38	37	37	36

Fig 6-7 (a) Distribution of users of main booking methods, by age group, 1981/82

Base = all those who booked at the box-office in person, by phone, or by post, at agencies, at Leicester Square booth, or through an inclusive package.

Booking Method, 1985/86

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	2550	1608	304	1039	232	255
<u>Age group</u>	%	%	%	%	%	%
16 - 18	11	11	13	10	9	17
19 - 24	34	13	9	15	20	14
25 - 34	23	30	17	22	27	24
35 - 44	15	24	27	23	14	16
45 - 54	9	13	20	16	14	9
55 - 64	5	6	10	9	10	11
65 and over	3	3	4	5	6	9
Mean age (actual)	31	35	38	37	37	37

Fig 6-7 (b) Distribution of users of main booking methods, by age group, 1985/86

Base = all those who booked at the box-office in person, by phone, or by post, at agencies, at Leicester Square booth, or through an inclusive package.

Only two groups showed a change in mean age in 1985/86. The mean age of those who booked at the box-office in person was the only one to show a decrease in 1985/86 and users of this booking method had the youngest mean age in 1985/86. Those booking by means of an inclusive package were the only group to show an increase in mean age in 1985/86. Those who booked by post to the theatre box-office consistently had the oldest mean age.

The 25-34's formed the largest age group of users of personal booking at the box-office in 1981/82, the 19-24's in 1985/86.

The age distribution of those who booked by telephone to the box-office showed relatively little change between 1981/82 and 1985/86. The 25-34's consistently formed the largest age group of telephone bookers. In 1981/82, this group had the youngest mean age.

In 1981/82, 25-34's formed the largest age group of those who booked by post to the theatre box-office, but in 1985/86, the 35-44's did so.

The 25-34's formed the largest age group of agency users in 1981/82, and the 35-44's in 1985/86, although the difference between these two age groups in percentage of agency users accounted for was small in both survey periods.

The 25-34's formed the largest age group of booth users in both survey periods.

Package bookers were the most polarised between the youngest and oldest age groups of any of the six main booking groups analysed in 1985/86, with the highest percentages of both 16-18's and 65 and overs.

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 their use of the six main booking methods. 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>Regular</u>		
Weighted base	2549	(2011)	2791	(1742)	4555	(2140)	1740	(579)	
<u>Booking method</u>	%		%		%		%		
B.off. in person	28	(46)	32	(40)	37	(39)	38	(42)	
B.office by phone	18	(19)	22	(29)	25	(28)	20	(24)	
B.office by post	2	(1)	5	(3)	10	(7)	22	(16)	
Ticket agency	29	(17)	22	(16)	14	(12)	7	(12)	
Leicester Sq.booth	5	(6)	6	(5)	4	(4)	4	(4)	
Inclusive package	7	(8)	4	(5)	1	(2)	*	(*)	

Fig 6-8 Distribution of each frequency group, by main booking methods used

Base = all respondents ,

All frequency groups except new visitors were more likely to book in person at the box-office than by any other method in 1981/82. All frequency groups used the box-office in person more than any other booking method in 1985/86, and new visitors changed from being the least likely to the most likely frequency group to do so. The new audience gained among the new visitors category in 1985/86

transacted most of their bookings at the box-office in person. In 1981/82, use of the theatre box-office for personal booking increased as frequency of theatre-going increased, but there was no direct relationship between frequency of London theatre-going and use of the box-office for personal booking in 1985/86.

Occasional and frequent theatre-goers were consistently the most likely frequency groups to book by phone to the box-office. All frequency groups increased their use of phone booking to the box-office in 1985/86.

Use of postal booking to the box-office consistently increased as frequency of London theatre-going increased, and regular theatre-goers were by far the most likely group to book by post to the box-office, although the percentage of sales to regulars which were accounted for by postal bookings fell in 1985/86. Postal bookings by regular theatre-goers fell from around 300,000 in 1981/82 to around 140,000 in 1985/86.

New visitors were consistently the most likely group to book at agencies. Although the percentage of sales to them which was made at agencies declined in 1985/86, this in fact represented a small increase in agency sales to this group. Around 540,000 agency sales were made to new visitors in 1981/82, and around 560,000 in 1985/86. The high level of use of agencies among this group compared

with other frequency groups may have been the result of a lack of knowledge of more direct booking methods.

Occasional theatre-goers were the most likely frequency group to use Leicester Square booth in 1981/82, new visitors in 1985/86. These two frequency groups contained higher percentages of holidaymakers than did the other two, and the former two groups were therefore more likely to have found it convenient to queue for tickets during the booth opening hours.

Inclusive packages were consistently used most by new visitors, and hardly at all by regular theatre-goers. As with agencies, the higher use of inclusive packages may have reflected a lack of knowledge among new visitors of the various booking options, but also may have indicated that they were not in general very interested in theatre, but had had tickets provided as part of their holiday or travel package.

The following table shows the distribution of London theatre-going frequency for users of each of the six main booking methods.

Booking Method, 1981/82

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
	<u>Person</u>	<u>Phone</u>	<u>Post</u>			
Weighted base	3946	2531	1009	1969	470	322

Visits in previous

<u>12 months</u>	%	%	%	%	%	%
This is first visit	19	18	5	36	24	50
1 other	12	12	6	16	15	24
2 others	11	12	8	13	14	10
3 - 6 others	29	29	24	23	21	12
7 - 11 others	13	15	20	7	13	3
12 or more others	16	14	37	5	13	1
Mean frequency						
(actual) (5)	3	3	5	2	2	1

Fig 6-9 (a) Distribution of users of main booking methods by frequency of London theatre-going, 1981/82

Base = all those who booked at the box-office in person, by phone, or by post, at agencies, at Leicester Square booth, or through an inclusive package.

Booking Method, 1985/86

	<u>Box office:</u>					
	<u>In</u>	<u>By</u>	<u>By</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
	<u>Person</u>	<u>Phone</u>	<u>Post</u>			
Weighted base	2551	1608	301	1035	228	255
<u>Visits in previous</u>						
<u>12 months</u>	%	%	%	%	%	%
This is first visit	34	23	8	33	39	53
1 other	14	16	6	14	14	15
2 others	12	16	9	12	12	18
3 - 6 others	22	26	30	26	19	8
7 - 11 others	9	11	18	9	8	5
12 or more others	9	8	29	6	8	1
<u>Mean frequency</u>						
(actual)	2	2	4	2	2	1

Fig 6-9 (b) Distribution of users of main booking methods, by frequency of London theatre-going, 1985/86
 Base = all those who booked at the box-office in person, by phone, or by post, at agencies, at Leicester Square booth, or through an inclusive package.

In general, those who booked at the theatre box-office, by whatever method, were more frequent London theatre-goers than were those who booked by the other methods analysed, although mean frequency of London theatre-going among those who used the theatre box-office did decline in 1985/86, while remaining stable for those who used the other booking

methods. In 1981/82, the 3-6 other visits category formed the largest frequency group of those who booked in person at the box-office, whereas in 1985/86, those who were making their first visit in 12 months to a London theatre were the largest frequency group among those who booked in person at the theatre box-office.

The largest frequency group of phone bookers was consistently those making 3-6 other visits.

Postal bookers had a higher mean frequency of London theatre-going than those using any of the other main booking methods analysed.

The distribution of frequency of London theatre-going among agency users was almost identical over the two survey periods, with those on their first visit in 12 months accounting for the largest frequency group of agency users, and around one-third of all agency sales.

Those on their first visit to a London theatre in 12 months also formed the largest frequency group of users of Leicester Square booth in both survey periods. Booth users contained the highest percentage of those making 12 or more other visits of users of any of the methods of booking which did not involve the theatre box-office.

Package booking users were more likely to be making their first London theatre visit in 12 months than were users of any of the other main booking methods analysed, with around half of all packaged sales in both survey periods going to this frequency group. Package bookers had the lowest mean frequency of London theatre-going of users of any of the booking methods analysed, suggesting that a number of package bookers might not have gone to the London theatre at all if a package had not been organised for them.

(2) Advance and day of performance booking

Both the 1981/82 and 1985/86 surveys included a question on whether bookings had been made in advance of the day of performance or on the day. The following additional information on when respondents booked was requested in the 1981/82 surveys only; a further breakdown was requested from respondents on time of booking, with day of performance bookings were divided into those made within an hour of the performance, that is, "on the door" sales, and those made earlier on the day, while bookings made in advance of the day of performance were divided into those made before the day of the performance and less than a week beforehand, and those made a week or more in advance; respondents were asked whether tickets had been obtained close to the time of curtain up through one of the Standby schemes⁽⁶⁾; and overseas visitors were asked whether their tickets had been booked prior to their arrival in the U.K.

The following table shows the distribution of the West End audience by whether they booked in advance or on the day of performance. Figures in brackets are the estimated number of sales made at each time.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11645	6482
<u>When booked</u>	% sales	% sales
	(millions)	(millions)
In advance	63 (5.5)	57 (6.0)
Day of performance	37 (3.3)	43 (4.6)

Fig 6-10 Distribution of the West End audience, by when booked

Base=all respondents

In both survey periods, more sales were made in advance of the day of performance than were made on the day, although the percentage of total sales which were made on the day of performance showed an increase in 1985/86. The number of on the day sales increased by 39% in 1985/86, while advance sales increased by only 10%.

In 1981/82, bookings made a week or more prior to the performance accounted for the largest category of sales, and on the door sales the smallest category. 13% of all sales had been made within an hour of the performance (equivalent to 36% of day of performance sales) and 24% earlier on the day of performance (equivalent to 64% of on the day sales). 21% of all sales had been made before the day of performance and less than a week beforehand (equivalent to 33% of advance sales) and 42% a week or more before the performance (equivalent to 67% of advance sales).

In 1981/82, 4% of respondents said that their ticket had been obtained through a Standby scheme, equivalent to about 350,000 sales, or 11% of on the day sales. 16% of all sales to students were made through a Standby scheme, and full-time students accounted for around 72% of Standby sales. This meant that around 250,000 student Standby sales were made during the 181/82 survey period.

In 1981/82, 16% of overseas visitors said they had had their tickets pre-booked before their arrival in the U.K., equivalent to around 380,000 sales made in this way. 83% of pre-bookers were attending a production that they had heard of prior to their arrival in the U.K. Overseas visitors in the autumn and winter months were more likely to have pre-booked tickets than those visiting during the spring and summer months. Those who had pre-booked were most likely to be from the U.S.A., Sweden, Canada and South Africa, and pre-bookers were more likely to be in London on holiday than on business. Educational groups and other organised parties formed a large section of those who had had their tickets pre-booked. 33% of pre-bookers were students, and 29% were attending the theatre as part of a large group of 12 or more. 33% of pre-bookers had obtained their tickets through a ticket agency in the U.K., 21% through an agency overseas, and 15% had their tickets as part of an inclusive package deal with travel and/or accommodation. Most of the remaining bookings for this group were, according to respondents, made by friends or relatives living in the U.K.

The following tables show the distribution of each area of residence group by whether they booked in advance or on the day of performance, and the area of residence distribution of those who booked in advance and on the day of performance. 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.K.</u>	
Weighted base	3113	(2390)	4666	(2395)	3850	(1674)
<u>When booked</u>	%		%		%	
In advance	42	(38)	71	(68)	69	(64)
Day of performance	58	(62)	29	(32)	31	(36)

Fig 6-11 Distribution of each area of residence group, by when booked

Base = all respondents

	<u>When booked</u>			
	<u>In advance</u>		<u>Day of performance</u>	
Weighted base	7325	(3680)	4304	(2779)
<u>Area of residence</u>	%		%	
Overseas	18	(24)	43	(52)
London boroughs	46	(42)	30	(26)
Rest U.K.	36	(34)	27	(22)

Fig 6-12 Distribution of advance and day of performance bookers, by area of residence

Base = all respondents

Only overseas visitors were more likely, in either survey period, to book on the day of performance than to book in advance, although there was an increase in the level of on the day booking by each area of residence group in 1985/86. Overseas visitors formed the largest group of those who booked on the day of performance, especially in 1985/86, when they accounted for over half of all the day of performance sales.

London boroughs residents were the most likely area of residence group to book in advance, and they formed the largest group of those who booked in advance. They were, however, more likely in 1981/82 to make use of Standby schemes than were either overseas or other U.K. residents. Presumably they were more willing to take a chance on the availability of Standby, as they could easily return to the theatre on another day if Standby were unavailable, whereas visitors to London could not as readily afford to take a chance if they were only in London for a short time. 5% of sales to London boroughs residents (around 172,000 tickets), 4% to overseas visitors, (around 93,000 tickets) and 3% to the rest U.K. group (around 85,000 tickets) were made on Standby.

The following tables shows the distribution of each sex by whether they booked in advance or on the day of performance, and the sex distribution of those who booked in advance and on the day of performance. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6756 (3129)	4881 (3315)
<u>When booked</u>	%	%
In advance	67 (62)	57 (52)
Day of perf.	33 (38)	43 (48)

Fig 6-13 Distribution of each sex, by when booked

Base = all respondents

	<u>When booked</u>	
	<u>In advance</u>	<u>Day of performance</u>
Weighted base	7337 (3673)	4300 (2771)
<u>Sex</u>	%	%
Female	61 (53)	51 (43)
Male	39 (47)	49 (57)

Fig 6-14 Distribution of advance and day of performance bookers, by sex

Base = all respondents

Both sexes were more likely to book in advance than on the day of performance, and women were more likely than men to do so. Women consistently accounted for the majority of those who booked in advance. However, the number of advance bookings made by women decreased by 6%, or around 0.2 million, in 1985/86, while the number of advance bookings by men increased by 33%, or around 0.7 million.

In 1981/82, 5% of sales to men and 4% of those to women were made on Standby, but because of the numerical predominance of women in that survey period, the majority of Standby users were female.

The following tables show the distribution of each age group by whether they booked in advance or on the day of performance, and the age distribution of those who booked in advance and on the day of performance.

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	927	2095	3145	2331	1740	908	452
<u>When booked</u>	%	%	%	%	%	%	%
In advance	75	57	64	68	65	63	66
Day of perf.	25	43	36	32	35	37	34

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	763	1418	1535	1218	769	437	251
<u>When booked</u>	%	%	%	%	%	%	%
In advance	55	39	58	70	65	65	61
Day of perf.	45	61	42	30	35	35	39

Fig 6-15 Distribution of each age group, by when booked

Base = all respondents

	<u>When booked</u>	
	<u>In advance</u>	<u>Day of performance</u>
Weighted base	7306 (3632)	4292 (2759)
<u>Age group</u>	%	%
16 - 18	8 (11)	6 (12)
19 - 24	16 (15)	20 (32)
25 - 34	27 (25)	27 (23)
35 - 44	21 (24)	18 (14)
45 - 54	15 (13)	15 (10)
55 - 64	9 (8)	10 (6)
65 and over	5 (4)	4 (3)
Mean age (actual)	37 (37)	37 (32)

Fig 6-16 Distribution of day of performance and advance bookers, by age group

Base = all respondents

All age groups, except the 19-24's in 1985/86 only, were more likely to book in advance than on the day of performance.

In 1981/82, the 16-18's were the most likely age group to book in advance. A high percentage of this age group were on organised trips. Theatre-going was evidently more casual among the 16-18's in 1985/86, when they became the second least likely age group to book in advance.

The 19-24's were consistently the least likely group to

book in advance. This age group contained a high percentage of students, many of whom would wish to wait until the day of performance to try for reduced price Standby tickets. In 1985/86, the 19-24's became much more likely than any other age group to book on the day of performance, and were the only age group who were more likely to book on the day of performance than in advance.

All the under 35 age groups showed an increased likelihood to book on the day of performance in 1985/86, while for most of the 35 and over groups, there was little change in when their bookings were made. The 35-44's were the most likely age group to book in advance in 1985/86. There was a particularly large percentage swing towards on the day booking by the 65 and overs.

The mean age of those who booked on the day of performance decreased in 1985/86, while that of those who booked in advance remained stable. From having the same mean age as advance bookers in 1981/82, day of performance bookers changed to having a mean age 5 years lower in 1985/86. In 1981/82, the 25-34's were the most important age group among those who booked on the day of performance, while in 1985/86 19-24's became the most important age group, accounting for nearly one-third of all on the day sales. The under 25's accounted for 44% of all on the day sales in 1985/86, compared with 26% of advance sales. The age distribution of advance bookers was very similar in both

survey periods, with the 25-34's consistently forming the largest age group of those who booked in advance.

The mean age of users of Standby in 1981/82 was 26.

The following tables show the distribution of each of the four frequency groups of London theatre-going analysed in section 1 of Chapter 4 by whether they booked in advance or on the day of performance, and the London theatre-going frequency distribution for those who booked in advance and on the day of performance. 1981/82 figures are given first, 1985/86 figures follow in brackets.

Frequency group (London theatre-going)

New

	<u>Visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2560(2009)	2789(1748)	4546(2139)	1748(570)
<u>When booked</u>	%	%	%	%
In advance	54 (46)	61 (59)	69 (65)	74 (64)
Day of perf.	46 (54)	39 (41)	31 (35)	26 (36)

Fig 6-17 Distribution of each frequency group, by when booked

Base = all respondents

	<u>When booked</u>			
	<u>In advance</u>		<u>Day of performance</u>	
Weighted base	7346	(3707)	4297	(2759)
<u>Visits in previous 12 mths</u>	%		%	
This is first visit	18	(25)	29	(39)
1 other	11	(15)	14	(14)
2 others	11	(13)	12	(12)
3 - 6 others	28	(26)	24	(19)
7 - 11 others	15	(11)	10	(7)
12 or more others	17	(10)	11	(9)
Mean frequency (actual)	3	(2)	2	(2)

Fig 6-18 Distribution of advance bookers and day of performance bookers, by frequency of London theatre-going

Base = all respondents

In 1981/82, all frequency groups were more likely to book in advance than on the day of performance and there was a clear relationship between a high frequency of London theatre-going and a high level of advance booking, with the one increasing as the other did. In 1985/86, new visitors remained the most likely group to book on the day of performance, and were the only group to be more likely to book on the day of performance than to book in advance. Regular theatre-goers, however, did not remain the most likely group to book in advance in 1985/86, when they were slightly less likely than frequent theatre-goers to do so. Regular theatre-goers showed a larger percentage swing

towards day of performance booking in 1985/86 than any other frequency group. An increased casualness in London theatre going, as indicated by booking habits, was apparent among the regular theatre-goers group in 1985/86.

In 1981/82, those who booked in advance had a higher mean frequency of London theatre-going than those who booked on the day of performance, but in 1985/86, both had the same mean frequency. The percentage of advance sales which were accounted for by those making their first visit in 12 months to a London theatre increased in 1985/86, while the percentage accounted for by those who had made 12 or more other visits to London theatres in the past 12 months decreased. Advance bookings by the latter group of regular theatre-goers decreased from around 1.0 million in 1981/82, to around 0.6 million in 1985/86, while advance bookings by those making their first visit in 12 months to a London theatre increased from around 1.0 million to around 1.5 million.

There was no significant difference in frequency of London theatre-going among users of the Standby scheme and other theatre-goers.

(3) Method of paying for tickets

In both survey periods, respondents were asked their ticket had been paid for. Two additional questions on credit card ownership and use were included in the 1981/82 surveys. These were; whether a credit card was held, and if so, which one, and whether credit cards had been used in the past to pay for theatre tickets. In 1985/86, no additional questions on credit card use or ownership were included, but in the question on payment method used, respondents who said they had paid by credit card for the performance surveyed were asked to indicate which one they had used.

The following table shows the distribution of methods of payment for tickets for the performance surveyed. Figures in brackets are the estimated number of sales which were paid for by each of these methods.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11631	6498
<u>Method of payment</u>	% sales	% sales
	(millions)	(millions)
Cash	44 (3.9)	50 (5.3)
Cheque	23 (2.0)	17 (1.8)
Credit card	25 (2.2)	26 (2.8)
Tokens (1985/86 only)	n/a (n/a)	1 (0.1)
Packaged booking	3 (0.3)	4 (0.4)
Other, inc. complimentary	5 (0.4)	2 (0.2)

Fig 6 19 Distribution of the West End audience, by methods of payment used

Base = all respondents

Cash was used to pay for theatre tickets more often than any other method, and 1985/86 saw a large rise in cash sales, of 36%, with around half of all sales in 1985/86 paid for by cash.

Credit card was the second most often used method of payment, and credit card sales also increased in 1985/86, though by a smaller percentage than cash sales, by 27%. In 1981/82, 66% of the audience were credit card holders. Visa was the most commonly held card. 41% of card holders had a Visa card, 36% an Access card, 18% an American Express card, and 6% a Diners' Club or other card. 33% of all card holders had used their cards to pay for tickets for the performance surveyed (33% of Visa holders, and 37%

each of Access and American Express card holders), and about 8% of non card holders had had their tickets for the performance surveyed paid for by credit card, presumably by card holding companions. 63% of card holders had at some time used their credit card to buy theatre tickets for performances other than that surveyed. In 1985/86, respondents were asked only to state which credit card they had used to pay for tickets for the performance surveyed, if applicable. Visa was the most often used card, and payments by Visa accounted for 12% of all sales (around 1.3 million tickets), Access for 10% (around 1.1 million tickets), American Express for 4% of sales (around 0.4 million tickets) and Diners Club for less than 1% of all sales (around 59,000 tickets).

Cheque was the third most often used method of payment. The number of sales paid for by cheque fell by 10% in 1985/86.

Theatre tokens for West End performances, which operate in the same way as book or record tokens, were introduced in 1984, and the 1985/86 surveys produced a figure of about 1% of all sales, or around 135,000 tickets in that period being paid for by tokens.⁽⁷⁾

The other methods of payment mentioned were; package bookings, (although payment for the package itself would have been made by one of the aforementioned methods); and various complimentary ticket schemes, operated by the

theatre itself, or by clubs or at the work place. Together, these methods of payment accounted for less than 10% of all sales, in both survey periods.

The following table shows the distribution of each area of residence group by methods of payment used. 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.K.</u>	
Weighted base	3114	(2394)	4652	(2400)	3838	(1682)
<u>Method of payment</u>	%		%		%	
Cash	66	(66)	34	(43)	38	(37)
Cheque	6	(7)	30	(18)	29	(26)
Credit card	17	(16)	31	(32)	27	(35)
Tokens (85/86 only)	n/a	(1)	n/a	(1)	n/a	(*)
Packaged booking	5	(10)	*	(1)	5	(2)
Other	6	(2)	5	(5)	1	(*)

Fig 6-20 Distribution of each area of residence group, by methods of payment used

* = less than 0.5%

Base = all respondents

All area of residence groups used cash more often than any other method of payment. Overseas visitors and London

boroughs residents consistently used credit cards most often after cash, while other U.K. residents used cheques most often after cash in 1981/82, and credit cards in 1985/86.

Cash accounted for the majority of payments by overseas visitors. Overseas visitors were much less likely than U.K. residents to pay by cheques or credit cards. Their lower use of cheques could be accounted for by overseas banks' cheques not being negotiable in the U.K., but the major credit cards which were likely to be held by overseas visitors are accepted in London theatres. 68% of overseas visitors held a credit card in 1981/82, but only 26% of overseas credit card holders had used their card to purchase theatre tickets for the performance surveyed, compared with the 67% of overseas credit card holders who had used their card for tickets for some other theatre performance. The comparable figures for the U.K. audience in 1981/82 were 65% holding a credit card, 43% of card holders using it to pay for tickets for the performance surveyed, and 67% of card holders using it for other theatre performances. The lower use of credit cards to pay for London theatre tickets among overseas visitors may have stemmed from a lack of understanding of how to use credit cards at London theatres, or from the reluctance of some West End theatre box-offices to accept credit cards close to the performance starting time, overseas visitors being particularly likely in 1981/82 to purchase their tickets on the door.

In 1981/82, London boroughs residents' purchases were fairly evenly spread between cash, cheque and credit card payments, but in 1985/86 there was a swing among this group towards cash payments, while the number of cheque payments they made showed a substantial decrease. In 1981/82, London boroughs residents were the most likely area of residence group to pay by credit card, but in 1985/86, other U.K. residents made a higher percentage of their payments by credit card than London boroughs residents did. The actual number of credit card payments made by London boroughs residents remained slightly higher than that made by other U.K. residents, however, because of the former group's numerical predominance. London boroughs residents made around 1.0 million credit card payments in 1981/82 and around 1.1 million in 1985/86, and the rest U.K. group around 0.8 million in 1981/82, and around 1.0 million in 1985/86.

The rest U.K. group was the only one to show a decline, although a small one, in the percentage of purchases which were paid for by cash in 1985/86. In 1981/82, cheques were used slightly more often than credit cards by this group, but in 1985/86, credit card usage among this group increased, and credit cards became the second most commonly used method of payment among this group. In 1985/86, this group made a higher percentage of their payments by credit card than did the other area residence groups.

The following table shows the area of residence

distribution of users of the three most commonly used methods of payment, and of tokens users. An analysis of those making packaged bookings users has already been made in the section on booking methods used. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Method of payment</u>			
	<u>Cash</u>	<u>Cheque</u>	<u>Credit Card</u>	<u>Tokens</u>
Weighted base	5116(3242)	2671(1106)	2918(1697)	n/a (78)
<u>Area of residence</u>	%	%	%	%
Overseas	41 (49)	7 (16)	19 (21)	n/a (47)
London boroughs	31 (30)	51 (39)	48 (42)	n/a (48)
Rest U.K.	28 (21)	42 (44)	33 (37)	n/a (5)

Fig 6-21 Distribution of users of main payment methods, by area of residence

Base=all who paid by cash, cheque, credit card or tokens

Overseas visitors consistently formed the largest group of cash users.

In 1981/82, London boroughs residents accounted for the majority of cheque payers, but in 1985/86, there was a substantial decrease in cheque payments by London boroughs residents, from around 1.0 million in 1981/82, to around 0.6 million in 1985/86, and the rest U.K. group became the largest group of cheque users.

The area of residence distribution of credit card users showed little change over the two survey periods, with London boroughs residents consistently forming the largest group of credit card users. In 1981/82, 29% of Visa holders were from overseas, 41% from London boroughs, and 30% from other parts of the U.K. Americans, Canadians, and South Africans were the most likely groups of overseas visitors to be Visa holders. 24% of Access holders were from overseas, 42% from London boroughs, and 34% from other parts of the U.K. Access cards were more common than Visa cards among visitors from the Scandinavian countries. 52% of American Express holders were from overseas, about two-thirds of them from the U.S.A., and this was also quite a commonly held card among Australians. In 1985/86, those using the three major cards to pay for tickets for the performance surveyed were most likely to come from: Visa users - from London boroughs; Access users - from other parts of the U.K.; and American Express users - from overseas, especially from the U.S.A. and Switzerland.

Tokens users were almost equally likely to be from London boroughs or overseas, with very few from other parts of the U.K.

The following tables shows the distribution of each sex by payment methods used, and the sex distribution of users of the three most commonly used payment methods, and of tokens users. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	6754 (3180)	4870 (3306)
<u>Method of payment</u>	%	%
Cash	42 (47)	49 (54)
Cheque	25 (19)	19 (14)
Credit card	24 (27)	27 (26)
Tokens (85/86 only)	n/a (1)	n/a (1)
Packaged booking	4 (4)	2 (5)
Other	5 (2)	3 (*)

Fig 6-22 Distribution of each sex, by methods of payment used

* = less than 0.5%

Base = all respondents

	<u>Payment method</u>			
	<u>Cash</u>	<u>Cheque</u>	<u>Card</u>	<u>Tokens</u>
Weighted base	5109(3269)	2666(1104)	2903(1688)	n/a (78)
<u>Sex</u>	%	%	%	%
Female	55 (46)	64 (53)	55 (50)	n/a (54)
Male	45 (54)	36 (47)	45 (50)	n/a (46)

Fig 6-23 Distribution of users of main payment methods, by sex

Base = all who paid by cash, cheque, credit card or tokens

Both sexes consistently paid by cash more often than by any other method. In 1981/82, cheque was the second most often used method of payment among women, credit card among men. In 1985/86, both sexes used credit cards most often after cash.

Men were more likely than women to pay by cash, and the majority of sales to men in 1985/86 were paid for by cash. In 1981/82, even though men were more likely than women to pay by cash, women accounted for the majority of cash users, because of their numerical predominance in the West End audience as a whole. The balance between the sexes among those paying by cash altered in 1985/86, with a large increase in the number of cash payments by men, from around 1.7 million in 1981/82 to around 2.8 million in 1985/86, and men accounted for the majority of cash payers in the second survey period.

Women were more likely than men to pay by cheque, and women formed the majority of cheque payers in both survey periods. However, cheque payments by women decreased from around 1.3 million in 1981/82 to around 1.0 million in 1985/86, while cheque payments by men showed a small increase, from around 0.7 million in 1981/82, to around 0.8 million in 1985/86.

In 1981/82, men were slightly more likely than women to pay by credit card, but in 1985/86, women were slightly more

likely than men to do so. Women accounted for the majority of credit card payers in 1981/82, although as with cash payers, this was because of their numerical predominance. In 1981/82, Visa holders were most likely to be female, and Access holders to be male. American Express holders were very much more likely to be male than female. In 1985/86, credit card users were equally likely to be male or female.

In the 1985/86 sample of tokens users, they were more likely to be female than male.

The following tables show the distribution of each age group by payment methods used, and the age distribution of users of the three most commonly used methods of payment, and of tokens users. Where appropriate, 1981/82 figures are given first, 1985/86 figures follow in brackets.

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	921	2093	3142	2334	1738	902	458
<u>Method of payment</u> %	%	%	%	%	%	%	%
Cash	45	55	43	40	44	44	53
Cheque	26	22	24	24	22	21	22
Credit card	19	16	26	29	30	28	22
Packaged booking	5	2	2	4	2	3	1
Other	5	5	5	3	2	4	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	759	1409	1531	1209	764	429	250
<u>Method of payment</u> %	%	%	%	%	%	%	%
Cash	50	65	48	43	38	40	46
Cheque	24	15	15	21	18	14	19
Credit card	17	14	29	26	40	38	24
Tokens (85/86 only)	*	*	*	3	*	1	-
Packaged booking	7	3	4	4	3	7	11
Other	2	3	4	3	1	*	*

Fig 6-24 Distribution of each age group, by methods of payment used

* = less than 0.5%

Base = all respondents

Payment method

	<u>Credit</u>			
	<u>Cash</u>	<u>Cheque</u>	<u>Card</u>	<u>Tokens</u>
Weighted base	5107(3264)	2668(1102)	2897(1681)	n/a(78)
<u>Age group</u>	%	%	%	%
16 - 18	7 (12)	7 (16)	5 (7)	n/a (4)
19 - 24	21 (31)	17 (18)	12 (11)	n/a(10)
25 - 34	26 (23)	29 (21)	28 (26)	n/a(10)
35 - 44	18 (16)	21 (22)	24 (25)	n/a(62)
45 - 54	15 (9)	14 (13)	17 (18)	n/a (5)
55 - 64	9 (6)	8 (6)	10 (10)	n/a (9)
65 and over	4 (3)	4 (4)	4 (3)	n/a (-)
Mean age (actual)	37 (32)	35 (34)	38 (38)	n/a(39)

Fig 6-25 Distribution of users of main payment methods,
by age group

Base = all those who paid by cash, credit card,
cheque or tokens

Cash was the payment method most often used by all age groups, except the 45-54's in 1985/86 only.

The 19-24's, who also had the highest levels of day of performance booking, were consistently the most likely age group to pay by cash. The 16-18's and the 65 and overs also had a high level of payment by cash.

Cheques were used most often by the 16-18's, and least

often by the 55-64's. Cheque was the second most commonly used method of payment among the under 25's, whereas for all except one of the 25 and over age groups, credit cards were the second most commonly used method of payment. The exception was the 45-54's, in 1985/86 only, when they used credit cards more than any other method of payment, including cash.

Credit cards were most heavily used by the 45-54 age group. Use of credit cards increased as a percentage of payments among all the 45 and over age groups in 1985/86, while decreasing among the under 25's and the 35-44's.

The only age group to make substantial use of tokens in 1985/86 was the 35-44's.

Cash users had the youngest mean age in 1985/86. Their mean age was much lower in 1985/86 than in 1981/82. In 1981/82, the 25-34's formed the largest age group of cash users, but in 1985/86 it was the 19-24's, and they accounted for nearly one-third of cash payments in 1985/86.

Cheque users had the youngest mean age in 1981/82. Their mean age decreased in 1985/86, but not by as much as that of cash users. The 25-34's formed the largest age group of cheque users in 1981/82, but their numbers decreased in 1985/86, with cheque payments by this group decreasing from around 0.5 million in 1981/82, to around 0.4 million in

1985/86. The 35-44's formed the largest age group of cheque users in 1985/86.

Credit card users consistently had the highest mean age among users of the three major payment methods. They showed little change in age distribution over the two survey period, with the 25-34's consistently forming the largest age group of credit card users. The mean age of all credit card holders in 1981/82 was 39, compared with a mean age of 38 among credit card users, indicating that the older credit card holders were less likely to use their card to pay for theatre tickets than the younger ones were. In 1981/82, the mean age of both Visa and Access holder was 39, and the mean age of American Express holders was 41.

Tokens users in 1985/86 had a higher mean age than any of the other three groups analysed, with the majority of tokens users falling into the 35-44 age group.

The following tables show the distribution of each of the four frequency groups of London theatre-going analysed in section 1 of Chapter 4 by payment methods used, and the London theatre-going frequency distribution of users of the three most commonly used methods of payment, and of tokens. Where appropriate, 1981/82 figures are given first, 1985/86 figures follow in brackets.

Frequency group (London theatre-going)

New

	<u>Visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2541(2008)	2788(1737)	4549(2140)	1741(581)
<u>Method of</u>				
<u>payment</u>	%	%	%	%
Cash	54 (62)	46 (52)	42 (40)	36 (39)
Cheque	16 (13)	21 (16)	26 (20)	31 (21)
Credit card	19 (16)	24 (25)	28 (34)	29 (37)
Tokens	n/a (1)	n/a (*)	n/a (1)	n/a (1)
Packaged booking	7 (8)	4 (5)	1 (2)	* (*)
Other	5 (1)	6 (2)	3 (2)	4 (2)

Fig 6-26 Distribution of each frequency group, by methods of payment used

* = less than 0.5%

Base = all respondents

Payment method

	<u>Credit</u>			
	<u>Cash</u>	<u>Cheque</u>	<u>Card</u>	<u>Tokens</u>
Weighted base	5102(3261)	2669(1101)	2895(1679)	n/a(77)

Visits in previous

<u>12 months</u>	%	%	%	%
This is first visit	27 (39)	15 (26)	17 (21)	n/a(39)
1 other	13 (18)	11 (11)	11 (12)	n/a (4)
2 others	12 (11)	12 (14)	11 (13)	n/a(10)
3 - 6 others	25 (19)	20 (27)	29 (28)	n/a(12)
7 - 11 others	11 (6)	15 (11)	15 (14)	n/a(31)
12 or more others	12 (7)	19 (11)	17 (12)	n/a (4)
Mean frequency				
(actual)	2 (1)	2 (2)	3 (3)	n/a (2)

Fig 6-27 Distribution of users of main payment methods,
by frequency of London theatre-going

Base = all who paid by cash, cheque, credit card
or tokens

All frequency groups consistently used cash more often than any other method of payment. There was a link between a low frequency of London theatre-going and a high level of cash use. This may have been because many visitors to London were unaware of the possibility of using other methods of payment, or were unable to use other methods, such as cheques drawn on overseas banks. All groups except frequent theatre-goers showed an increase in the percentage of purchases which they paid for by cash in 1985/86.

High use of cheques and credit cards was linked with a high frequency of London theatre-going. Use of both cheques and credit cards to pay for tickets was highest among regular theatre-goers.

Those who paid by cash had the lowest mean frequency of London theatre-going in 1985/86, and those who paid by credit card, consistently had the highest mean frequency of London theatre-going. Users of credit cards showed the least change in distribution of frequency of London theatre-going between the two survey periods, users of cash most change.

Tokens users were fairly evenly divided between those who had made less than 3 and those who had made 3 or more other visits to London theatres in the previous 12 months.

(4) Relationship between booking methods used, when tickets were booked, and methods of payment used

The following three pairs of tables show the relationships between the main booking methods used, when bookings were made, and how they were paid for. The first pair of tables show the distribution of the major booking methods used by when these bookings were made, and by the main methods of payment used. The second pair of tables show the distribution of day of performance and advance bookings by the main methods of booking and of payment used for each. The final pair of tables show the distribution of the three most commonly used methods of payment by the main methods of booking which they paid for and by when the booking was made.

Booking method, 1981/82

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	3960	2551	1043	1971	471	340
<u>When booked</u>	%	%	%	%	%	%
In advance	42	82	100	76	n/a	92
Day of performance	58	18	-	24	100	8

Booking method, 1985/86

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	2653	1622	318	1050	243	260
<u>When booked</u>	%	%	%	%	%	%
In advance	38	83	100	67	n/a	74
Day of performance	62	17	-	33	100	26

Fig 6-28 (a) Distribution of users of main booking methods,
by when booking was made

Base = all those who booked at the box-office
in person, by phone, or by post, at agencies,
at Leicester Square booth or through an
inclusive package.

Booking method, 1981/82

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	3957	2550	1039	1970	469	338
<u>Method of payment</u>	%	%	%	%	%	%
Cash	68	18	n/a	49	100	36
Cheque	14	24	75	25	n/a	57
Credit card	17	56	25	22	n/a	3

Booking method, 1985/86

Box office:

	<u>In</u>	<u>By</u>	<u>By</u>			
	<u>Person</u>	<u>Phone</u>	<u>Post</u>	<u>Agency</u>	<u>Booth</u>	<u>Package</u>
Weighted base	2651	1621	312	1046	240	260
<u>Method of payment</u>	%	%	%	%	%	%
Cash	76	16	n/a	46	100	56
Cheque	12	20	56	26	n/a	33
Credit card	13	62	40	21	n/a	9

Fig 6-28 (b) Distribution of users of main booking methods,
by main methods of payment used

Base = all those who booked at the box-office
in person, by phone, or by post, at agencies,
at Leicester Square booth or through an
inclusive package.

For the remaining tables in this section, 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>When booked</u>		<u>Day of Performance</u>	
	<u>In advance</u>		<u>Day of Performance</u>	
Weighted base	7321	(3678)	4302	(2777)
<u>Booking method</u>	%		%	
Box office in person	24	(28)	54	(60)
Box office by phone	29	(37)	11	(10)
Box office by post	15	(9)	-	(-)
Ticket agency	20	(19)	12	(13)
Leicester Square booth	n/a	(n/a)	13	(10)
Inclusive package	4	(6)	1	(2)

Fig 6-29 (a) Distribution of advance and day of performance bookers, by main booking methods used

Base = all respondents

	<u>When booked</u>		<u>Day of performance</u>	
	<u>In advance</u>		<u>Day of performance</u>	
Weighted base	7319	(3673)	4301	(2772)
<u>Method of payment</u>	%		%	
Cash	28	(32)	74	(76)
Cheque	33	(24)	5	(8)
Credit card	32	(37)	13	(12)

Fig 6-29 (b) Distribution of advance and day of performance bookers, by main payment methods used

Base=all respondents

	<u>Payment method</u>					
	<u>Cash</u>		<u>Cheque</u>		<u>Credit Card</u>	
Weighted base	5114	(3238)	2666	(1104)	2914	(1691)
<u>Booking method</u>	%		%		%	
Box office in person	53	(62)	21	(27)	23	(20)
Box office by phone	9	(8)	23	(28)	50	(59)
Box office by post	-	-	28	(14)	9	(8)
Ticket agency	19	(14)	18	(24)	14	(13)
Leicester Sq. booth	9	(7)	n/a	(n/a)	n/a	(n/a)
Inclusive package	2	(4)	7	(87)	*	(1)

Fig 6-30 (a) Distribution of users of main payment methods, by main bookings methods used

* = less than 0.5%

Base = all who paid by cash, cheque or credit card

	<u>Payment method</u>					
	<u>Cash</u>		<u>Cheque</u>		<u>Credit Card</u>	
Weighted base	5111	(3234)	2668	(1101)	2914	(1689)
<u>When booked</u>	%		%		%	
In advance	39	(35)	92	(80)	81	(81)
Day of performance	61	(65)	8	(20)	19	(19)

Fig 6-30 (b) Distribution of users of main payment methods, by when booked

Base = all who paid by cash, cheque or credit card

Advance booking was highest among users of postal booking. 100% of postal bookings were made in advance. Advance booking levels were also high among package and phone booking users.

Those who booked at the theatre box-office in person were the only group to be more likely to book their tickets on the day of performance than in advance. Day of performance sales increased as a percentage of personal bookings at the box office in 1985/86. Personal bookers at the box-office accounted for the majority of day of performance sales in both survey periods.

Agency users were the second most likely group to have made their purchase on the day of performance. Day of performance sales also increased as a percentage of agency sales in 1985/86.

The majority of personal bookings at the box-office were paid for in cash. Users of personal booking at the box-office were less likely to pay by credit card than were those using phone or postal booking to the box-office.

Those who booked by phone to the box-office were the most likely group to pay by credit-card.

Cheque was the most commonly used method of payment among

those who booked by post to the box-office. There was, however, a swing among this group away from cheque payments, towards a higher percentage of postal bookings being paid for by credit card in 1985/86.

Cash was the most commonly used method of payment among those who booked at agencies.

Cheques paid for the majority of packaged bookings in 1981/82, cash in 1985/86.

The largest section of advance sales were phone bookings to the box-office, and the largest section of day of performance sales were personal bookings at the box-office.

The payment methods used for day of performance sales were virtually unchanged between the two survey periods, with cash payments being made for 74% of day of performance sales in 1981/82, and for 76% in 1985/86. Credit cards were used more often than cheques for day of performance bookings.

The distribution of payment methods used for advance bookings did change in 1985/86, however, with a swing away from cheques, which were the advance payment method most often used in 1981/82, towards higher use of credit cards and cash for advance bookings in 1985/86. Credit cards

became the method of payment most often used for advance bookings in 1985/86.

In both survey periods, personal bookings at the box-office accounted for the majority of cash sales. Around half of all credit-card sales were phone bookings to the box-office.

In both survey periods, the majority of cash payments were made on the day of performance, and the majority of credit-card payments made in advance. There was a substantial change in 1985/86 in when cheque payments were made, however, with a much higher percentage of cheque payments being made on the day of performance in 1985/86 than in 1981/82.

Notes to Chapter 6

- (1) Throughout this chapter, the unit of sale analysed is the single ticket. If, for example, an individual theatre-goer had purchased four tickets, each ticket would be considered to be a "sale", rather than the purchase of the four tickets being considered a single transaction.

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

- (3) Source of booth sales figures is the SWET Marketing Office.

- (4) See note (3), Chapter 2, for details of the method used to calculate mean age.

- (5) See note (4), Chapter 2, for details of the method used to calculate mean frequency of theatre-going.

(6) Standby schemes in the West End generally make reduced price tickets available shortly before curtain-up, usually half an hour beforehand, to certain groups such as students, senior citizens, unemployed people and holders of the under 24 Railcard. The precise conditions of the Standby scheme vary from theatre to theatre. Some theatres restrict availability of Standby to full-time students only, while the National Theatre, for example, generally makes Standby tickets available to any theatre goer who is prepared to take a chance on last minute availability of tickets.

(7) Most of the 1985/86 surveys took place within a year of the introduction of the tokens scheme, and in its early stages, not every West End theatre participated, so that this assessment of the importance of tokens as a method of paying for West End tickets may not reflect the popularity of tokens in 1987 and later years, when the system is better established.

CHAPTER 7 AUDIENCE SPENDING RELATED TO WEST END
THEATRE-GOING

Following the completion of the survey programmes between 1981 and 1983, London theatre managements began to show an interest in the possibility of carrying out an economic impact study for the West End theatres. Studies of this kind, which measure the effect of a particular type of ARTS organisation, such as theatres, on the local economy, had often been carried out in the USA in the late 1970's and early 1980's.⁽¹⁾ Spending in the local area by audiences as a direct result of their theatre visit would be one factor in an economic impact equation for the West End theatres. It was decided to include questions on audience spending in the 1985/86 survey programme, with a view to possible development of the findings into a detailed economic impact study at a later date. This is still under consideration at the time of writing.

Strictly speaking, if audience spending is to be considered to be a direct contribution to the local economy, which is attributable to the presence of the West End theatres, then such spending should not have taken place locally if the theatres had not been situated in that area. This is impossible to establish with certainty. Respondents might well have gone to a West End cinema that day, for example, if the theatres were not there, and still spent money locally in addition to the cost of the cinema tickets.

Defining local spending also presented difficulties. It was thought to be likely that visitors to London would not necessarily understand the term West End if this were the phrase used to describe the area surrounding most of major London theatres, and at any rate, some of the theatres in SWET membership are located outside what are usually thought of as the central areas of London. The surveys therefore attempted to establish the amount of expenditure which was, in the words of the questionnaire, "directly related to your theatre visit", and no mention was made in the questionnaire of the area in which that expenditure should have been made. It was nonetheless assumed that most of the spending by audiences on items such as food and drink would have been made in the areas around the majority of West End theatres, because audiences were likely to prefer not to have to travel far following a meal or a drink before the performance. For categories of spending such as public transport fares, much of the expenditure incurred would in fact have been made outside the central area by people travelling in to the centre of London, but it would nonetheless represent a contribution by theatre-goers to the revenue for transport systems which ran into the central and West End area. Expenditure on baby-sitting was included in the list of items respondents were asked about, but with hindsight, it was realised that, although much of the expenditure on both baby-sitting and travel would probably have been made outside London, this type of expenditure had much less of a claim to be considered as a contribution to the local economy than expenditure on travel. This category of spending would be

unlikely to be included in a future economic impact study for the West End theatres.

There were further difficulties in establishing accurate figures. For example, separating expenditure on such items as petrol and parking by how much could be attributed to the theatre visits and how much to other reasons such as shopping, or travelling to work, probably proved difficult for respondents, although this difficulty had not been anticipated when deciding on the wordings for this section of the questionnaire. This was probably the reason for imprecise figures, or sometimes no figure at all, being given under this expenditure heading by some of those respondents who said that they had travelled to the theatre by car.

The same difficulty of assessing exact amounts attributable to theatre-going would have applied to spending on accommodation. In this case, however, it had been anticipated that much of the spending on accommodation by theatre goers visiting London could have been attributed to a mixture of reasons such as sightseeing, shopping, etc. and this section of the questionnaire therefore specifically requested accommodation expenditure "only if spent solely because of the theatre visit", with the intention of establishing how much was spent on accommodation for short breaks by people coming in to London for theatre visits which necessitated overnight stays. (2)

There was also the problem that many of the audience might not personally have spent money on the relevant items, but would have had money spent on their behalf by another member of their party. To try and overcome this difficulty, respondents were asked to state the total amount spent on each item or type of item by their party, and the number of people in the party. The former figure was then divided by the latter to give the mean spending per head for each member of the party, and the replies classified as if the individual respondent had in fact been responsible for that item of expenditure themselves. It was evident, however, that not all those in this situation did complete the questions as they related to their entire party, since the percentage of respondents claiming that they, or their party, had made any expenditure on a specific item, was, where relevant, usually lower than would have been suggested by their replies elsewhere in the questionnaire. For example, a lower percentage of respondents said that they, or someone in their party, had spent money on petrol and parking, than said they had travelled to the theatre by car.

It will be clear that it was difficult to conduct the measurement of audience spending as a direct contribution to the local economy with precision. A factor such as the likely under reporting of some items of expenditure because the individual did not personally incur the expenditure may have led to an under estimate of the true figures for total audience spending, while a factor such as the difficulty of

separating total expenditure on some items into the amounts incurred because of the theatre visit and for other reasons may have led to a degree of over-estimation of expenditure in some categories. In addition, this survey did not attempt to distinguish between spending made locally or elsewhere, owing to the difficulty of defining local in a way that would be understood in the same way by every member of an audience from a wide range of countries. While more specific wordings of the questions might, in retrospect, have helped with these difficulties, (for example, asking respondents to attribute a proportion of their total spending on items such as accommodation to the theatre visit, and to specify the area in which the expenditure took place) different and more detailed wording for each of the questions on expenditure would have made this part of the questionnaire appear to respondents to be even more complex than it was, and might have deterred them from completing this section at all. In sum, an economic impact study of this type is more difficult to conduct, and is less likely to produce accurate figures than an analysis of say, audience demographics.

The questionnaire requested information on expenditure on: eating out/restaurants; public transport; sweets, drinks, programmes, etc. in the theatre (to ensure that spending on this type of item inside the theatre was not allocated by respondents to another category, and therefore wrongly counted as a contribution to the local economy rather than

to the West End theatres themselves); sweets, drinks, etc., outside the theatre; petrol and parking; baby sitting; and accommodation. A category was included for any other expenditure, but almost all the replies written in for this category were for expenditure on taxis. Spending on theatre tickets was not included, since, with the exception of agency fees, this was a contribution specifically to the revenues of the theatres, and not to the local economy. Agency fees were not asked about, since it was thought that respondents would not necessarily know how much of the cost of the ticket was in fact an agency fee. Details of ticket revenue for the theatres was already covered in the box office sales research project. (3)

The following table shows the distribution of audience spending on each of the aforementioned items.

Eating out/restaurant

(if planning to eat afterwards,
estimate requested)

Weighted base	6264
<u>Amount spent</u>	%
Specified spent nothing	29
£2 or less	8
£2.01 to £5.00	22
£5.01 to £10.00	24
£10.01 to £15.00	9
£15.01 to £20.00	4
£20.01 to £30.00	2
£30.01 to £40.00	1
£40.01 or over	1
Mean spending per head of those who spent something (actual)	£8.15 ⁽⁴⁾

Fig 7 1 Di tri bu ti o n of au di en ce sp en d i n g o n i t e m s
di re ct ly re l a t e d to th ea t r e a t r e v i s i t , 1985/86

Mean spending to nearest 5 pence

Base all respondents

Table continued on next page.

	<u>Public</u>	<u>Petrol/</u>	<u>Sweets etc</u>
	<u>transport</u>	<u>parking</u>	<u>in house</u>
Weighted base	6230	6198	6192
<u>Amount spent</u>	%	%	%
Specified spent nothing	55	80	42
£1.00 or less	29	10	34
£1.01 to £2.00	8	4	18
£2.01 to £3.00	2	3	4
£3.01 to £4.00	2	*	1
£4.01 to £5.00	1	1	*
£5.01 to £6.00	1	*	*
£6.01 to £10.00	1	1	*
£10.01 or over	2	*	*
Mean spending per head of those who spent something (actual)	£1.80	£1.90	£1.10

Fig 7 1 Distribution of audience spending on items directly related to theatre visit

Mean spending to nearest 5 pence

*=less than 0.5%

Base-all respondents

Table continued on next page.

	<u>Sweets etc.</u>	<u>Baby-</u>	
	<u>outside</u>	<u>sitting</u>	<u>Taxis</u>
Weighted base	6230	6237	6206
<u>Amount spent</u>	%	%	%
Specified spent nothing	80	94	92
£1.00 or less	10	1	2
£1.01 to £2.00	7	2	2
£2.01 to £3.00	2	2	1
£3.01 to £4.00	*	*	2
£4.01 to £5.00	*	*	*
£5.01 to £6.00	*	*	*
£6.01 to £10.00	*	*	*
£10.01 or over	*	-	*
Mean spending per head of those who spent something (actual)	£1.35	£2.35	£2.65

Fig 7 1 D1 tribution of audience spending on items directly
related to theatre visit, 1985/86

Mean spending to nearest 5 pence

* less than 0.5%

Base all respondents

Table continued on next page.

Accommodation

Weighted base	6193
<u>Amount spent</u>	%
Specified spent nothing	95
£5.00 or less	1
£5.01 to £10.00	1
£10.01 to £20.00	1
£20.01 to £30.00	*
£30.01 to £40.00	1
£40.01 to £50.00	1
£50.01 or more	-
Mean spending per head of those who spent something (actual)	£20.90

Fig 7 1 Di stribution of audience spending on items directly
r lated to theatre visit

Mean spending to nearest 5 pence.

* less than 0.5%

Bas ed on all respondents

71% of respondents said that they had spent, or planned to spend, money on eating out in connection with that day's theatre visit (those who planned to eat afterwards being asked to give an estimate of the amount), compared with the 75% who said they had, or planned to, eat out that day. This discrepancy was largely accounted for by a number of respondents who said they planned to eat after the performance but who did not give an estimate of the amount they were likely to spend. The most common category of

expenditure on eating out was £5.01 to £10.00 per person. 76% of those who had spent money on eating out had spent £10.00 or less per person. Only 6% of those spending money on eating out had spent more than £20.00 per person. This suggests that a full-scale restaurant meal was not the norm when eating out in connection with a theatre visit. Wine bar or bistro meals, and fast food restaurants and cafes were probably much more commonly used by theatre-goers than were restaurants. The mean amount spent per head among those who did spend something was £8.15. If this figure is multiplied by the likely percentage of the overall audience who would eat out on a London theatre visit during the 1985/86 survey period (between the 71% who gave an amount of their spending on this occasion, and the 79% who said that they would normally eat out on a London theatre visit), spending by theatre-goers on eating out in connection with their theatre visits, during the nearest calendar year to the survey period, can be estimated at between £61 million and £68 million. This amount was equivalent to between 56% and 63% of total gross ticket revenue for the theatres during the survey period, and the amount spent by those individuals who did spend money on eating out was equivalent to 83% of the average price paid for a West End ticket during that period.⁽⁵⁾ Clearly, the food business in central London gained substantial amounts of trade from the presence of the West End theatres, although there may have been some reciprocal effect.

55% of the audience travelled to the theatre by public

transport in 1985/86, and 45% spent money on public transport. This means that 18% of those respondents who travelled to the theatre by public transport did not pay to do so, and presumably had passes or season tickets. Although the questionnaire did not specify single or return fares, since total expenditure was requested it was assumed that respondents gave return fares where appropriate. The mean amounts actually spent for each of the three methods of public transport used suggested that this was the case. Mean spending per head of all those who did spend something on public transport was £1.80. 82% of those who spent something spent £2.00 or less, and only 4% spent £10.01 or more.

The following table shows the distribution of spending on public transport by users of each of the three methods of public transport during the 1985/86 survey period.

	<u>Method of transport</u>		
	<u>Bus</u>	<u>Train</u>	<u>Tube</u>
Weighted base	610	663	2176
<u>Amount spent</u>	%	%	%
Specified spent nothing	14	12	21
£1.00 or less	40	21	42
£1.01 to £2.00	34	24	21
£2.01 to £3.00	8	16	6
£3.01 to £4.00	*	6	10
£4.01 to £5.00	*	4	*
£5.01 to £6.00	*	1	-
£6.01 to £10.00	*	10	-
£10.01 or more	3	6	-
Mean spending per head of those who spent something (actual) ⁽⁶⁾	£1.55	£3.20	£1.30

Fig 7-2 Distribution of audience spending on public transport directly related to the theatre visit, for users of each method of public transport, 1985/86

Mean spending to nearest 5 pence.

* -less than 0.5%

Base all public transport users

14% of bus travellers spent nothing on bus travel and therefore probably had a pass. The largest category of expenditure by bus users was £1.00 or less, and the mean spending per head of those who did spend something was

£1.55, higher than the mean spending of tube users. 3% of those who spent money on bus travel spent more than £10.00, indicating that they came by long distance coach rather than by London Regional Transport buses. (7)

British Rail users were the least likely group of public transport users not to spend money on travel by public transport, and were therefore probably the least likely group of public transport users to have passes. Only 12% of them did not pay for their travel to the theatre. The largest expenditure category among rail users was £1.01 to £2.00. The majority of those who spent money on rail travel spent £4.00 or less, and only 7% spent more than £10.00 per head. Mean spending per head of those who spent something on rail travel was £3.20.

Tube users were the most likely group of public transport user not to have incurred any expenditure on public transport when travelling to the theatre, and therefore probably to have passes. 21% of them had spent nothing on public transport. The majority of tube users spending money on travel spent £1.00 or less, but 13% of tube users who had spent money spent more than £3.00. This suggests that tube travel to the theatre from the outer districts covered by the tube network was quite common. The mean spending per head of those who spent something on tube travel was £1.30.

If it is assumed that most people who used public transport to travel to the theatre went home by the same method (in fact, the total number of return journeys by public transport is likely to have exceeded the number of outward journeys to the theatre since some respondents would have walked from work to the theatre, but returned home by public transport), and that most people gave return fares on their questionnaires, estimates can be made of the total number of journeys on public transport by non-pass holders during the survey period, which could reasonably be attributed to theatre visits, and of the additional income likely to have been generated by theatre-goers for each of the major public transport networks. For the 1985/86 survey period, if journeys and expenditure by pass holders are excluded, for buses the estimated figures are - 1.8 million journeys and £1.4 million income; for British Rail, 2.1 million journeys and £3.4 million income; and for London Underground, 5.7 million journeys and £3.7 million income. Total additional revenue for the public transport networks which was generated by theatre-goers during the survey period, was therefore around £8.5 million. For the London Underground, the additional income generated was equivalent to just over 2% of total non-pass passenger revenue during the 1985/86 financial year.⁽⁸⁾

20% of respondents said they had spent money on petrol and parking, compared with the 22% who said they had travelled to the theatre by car. Since some expenditure on these items must of necessity have been incurred by car

travellers, or on their behalf, the discrepancy must be accounted for either by those who found it difficult to give an estimate of the actual cost of petrol used on the journey to the theatre and who spent no money on parking, or by those who were driven in by friends, and who either did not consider they themselves had spent anything or did not know how much had been spent by their friends. Mean spending per head of those who did claim to spend something on petrol and parking was £1.90. This suggests that, while it may have proved difficult for respondents to estimate how much was spent on petrol because of their theatre visit, some spending on petrol was included in most people's figures, and not just parking fees. It is unlikely that a figure of £1.90 per person would be accounted for by parking fees only, especially as car travellers were particularly likely to attend the theatre in small groups; 35% of car travellers in 1985/86 were in groups of 3-6. A conservative estimate of £4 million can be made for total expenditure on petrol and parking incurred by respondents because of their theatre visit during the survey period.

Spending on drinks, sweets, programmes and related items in-house was more common than similar expenditure outside the theatre. 58% of respondents spent money on this type of item in the theatre, and only 20% outside. The most common category of in-theatre expenditure was £1.00 or less, and the mean amount spent per head among those who spent something was £1.10. These figures suggest that most

people's spending in-house was restricted to a programme and an ice cream or similar refreshment. Only 9% of those spending money in house spent more than £2.00 per head. In-house trade can be estimated from the survey results to have been worth about £6.8 million during the survey period. The actual figure is likely to have been higher, since a number of West End theatres have in-house restaurants or coffee bars, and any substantial spending there by theatre-goers was likely to have been included in their replies to the question on eating out/restaurant expenditure, rather than as part of their additional in-house spending.⁽⁹⁾

Outside the theatre, the most common category of spending on items such as sweets and drinks was £1.00 or less. Although fewer people spent money outside the theatre than spent money inside, the mean amount spent outside the theatre was higher, at £1.35 per head. An estimated £2.9 million worth of business in this expenditure category would have come from theatre-goers during the survey period.

Only 6% of respondents claimed to have spent money on baby-sitting because of their theatre visit, and the mean amount spent per head was £2.35. This would be equivalent to an actual mean payment of £5.70 per baby-sitter in many cases, if two adults from the same household were attending the theatre together. Around £1.5 million would have been spent by theatre goers on baby sitting payments during the

survey period. Of this amount, an estimated £0.6 million was made by those who lived in London boroughs, and could probably therefore be considered to be a contribution to the local economy as a direct result of the theatre visit.

Accommodation expenditure was requested only if it was incurred solely because of the theatre visit. The 5% of respondents who spent money on accommodation solely because of their theatre visit spent a mean amount of £20.90 per head. This suggests that bed and breakfast and guest houses were more commonly used than were hotels. An estimate of £11.1 million can be made for accommodation expenditure resulting directly from theatre visits.

Under the any other expenditure category, only spending on taxis featured significantly. 10% of respondents travelled to the theatre by taxi, and 8% of respondents claimed to have spent money on taxis. The mean spending per head by those who spent something was £2.65. It is likely that in most cases the amounts given represented only journeys to the theatre, as unlike most public transport users, taxi users could not pay for a return trip on the outward journey. An estimated £2.2 million was spent on taxi journeys to the theatre during the survey period. Although it is not possible to tell from the questionnaire how many of those who travelled to the theatre by taxi did in fact return by taxi, this figure can probably be almost doubled to allow for return journeys, to something in the region of

£4 million. The estimated total spending on taxis has been set at less than twice the presumed number of single journeys, to allow for the likelihood of some theatre-goers taking a taxi to the theatre because they were uncertain of its location, but returning by public transport once they knew the theatre area.

Very few respondents mentioned any other type of expenditure. There were occasional mentions of items such as souvenir records and books, gifts to friends who had purchased tickets or offered overnight accommodation, and new outfits for special theatre outings, but the numbers in each case were too small to allow any conclusions to be made about total audience spending on these items.

The following table shows the percentage of each area of residence group who spent money on each of the major items or types of item directly related to the theatre visit in 1985/86. Their mean spending on each item follows in brackets.

	<u>Area of residence</u>		
	<u>Overseas</u>	<u>London</u> <u>Boroughs</u>	<u>Rest</u> <u>U.K.</u>
Weighted base	2313	2322	1629
<u>Spent money on</u>	%(mean £)	%(mean £)	%(mean £)
Eating out	84 (8.50)	54 (8.35)	77 (7.60)
Public transport	52 (1.50)	38 (1.30)	46 (2.80)
Petrol and parking	5 (2.35)	27 (1.20)	31 (2.65)
Sweets etc in house	48 (1.00)	63 (1.15)	65 (1.10)
Sweets etc outside	14 (1.35)	22 (1.25)	23 (1.55)
Babysitting	2 (2.70)	9 (2.55)	8 (1.70)
Accommodation	6(21.00)	4(19.85)	5(21.75)
Taxis	11 (2.40)	6 (3.35)	6 (2.15)

Fig 7-3 Spending on items directly related to theatre visit, for each area of residence group, 1985/86

Mean spending to nearest 5 pence. Mean amounts are based only on those spending on the relevant items.

Base-all respondents

London boroughs residents were the least likely area of residence group to spend money on eating out. Many of them would have been able to eat at home before setting out for the theatre. Overseas visitors were the most likely group to spend money on eating out. Overseas visitors who did spend money on eating out spent the most per head, U.K. residents from outside London the least.

Overseas visitors were the most likely area of residence group to spend money on public transport, but they spent much less per head than those U.K. residents from outside London who spent money on public transport. The latter group would probably have further to travel, since many overseas visitors would have centrally located hotels. In 1985/86, 63% of overseas visitors, 52% of London boroughs residents, and 50% of other U.K. residents travelled to the theatre by public transport, compared with 52% of overseas visitors, 38% of London boroughs residents, and 46% of other U.K. residents spending money on public transport. Therefore, the percentages of public transport users from each area of residence group who were likely to have been pass holders were; 17% of those overseas visitors, 27% of those London boroughs residents and 8% of those other U.K. residents, who travelled to theatre by public transport.

U.K. residents from outside London were the most likely area of residence group to spend money on petrol and parking, and spent the most per head of those who did so. London boroughs residents were much more likely than overseas visitors to spend money on petrol and parking, but the mean amount spent per head by those London boroughs residents who did spend money on these items was considerably less than that of the other two groups.

U.K. residents from outside London were the most likely area of residence group to spend money on sweets,

programmes, drinks and related items in-house, and overseas visitors the least likely to do so. The low percentage of overseas visitors who claimed to have spent money on in-house purchases may have been explained by the verbal and written complaints received from some overseas visitors in both survey periods about a charge being made for programmes, when they were accustomed to free ones being provided in their home country, with a consequent resistance among some overseas visitors towards buying a programme. London boroughs residents who spent money on in house purchases spent a slightly higher mean amount than the other two groups.

U.K. residents from outside London were the most likely group to spend money on sweets, drinks etc outside the theatre, and spent the highest amount per head on these items. London boroughs residents, who spent the highest amount per head in-house, spent the lowest amount per head on similar purchases outside the theatre.

London boroughs residents were the most likely group to spend money on baby-sitting, overseas visitors the least likely, but overseas visitors who did spend money on babysitting spent the highest mean amount per head. U.K. residents from outside London who spent money on babysitting spent much less per head than the other two area of residence groups did. Typical baby-sitting rates were probably lower out of London than they were in London.

Overseas visitors were the most likely group to have spent money on accommodation solely because of their theatre visit. Since the mean amount they spent per head was only £21.00, this suggests that an overnight stop in London for theatre going, while on their way to another destination in the U.K., accounted for most of the accommodation spending by overseas visitors which could be attributed solely to the theatre visit. U.K. residents from outside London who did spend money on accommodation spent more per head than the other two groups. London boroughs residents who spent money on accommodation spent the least per head. Most of those London boroughs residents who spent money on accommodation would have been from the outer parts of the Greater London area, coming in to the central London area for a short theatre-going break.

Overseas visitors were the most likely group to write in, under the any other spending heading, expenditure on taxis. Although London boroughs residents were less likely than overseas visitors to do so, those who did spent more per head than overseas visitors. This suggests that overseas visitors were more likely to come to the theatre from central London locations than London boroughs residents were.

The following table shows the percentage of each sex who spent money on each of the major items or types of item directly related to the theatre visit in 1985/86. Their mean spending on each item follows in brackets.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	3112	3152
<u>Spent money on</u>	%(mean £)	%(mean £)
Eating out	66 (7.50)	75 (8.70)
Public transport	45 (1.75)	44 (1.85)
Petrol and parking	19 (1.70)	20 (2.05)
Sweets etc in house	58 (1.00)	57 (1.15)
Sweets etc outside	18 (1.05)	21 (1.60)
Babysitting	6 (2.05)	6 (2.65)
Accommodation	5(19.15)	5(22.60)
Taxis	8 (2.75)	8 (2.45)

Fig 7-4 Spending on items directly related to the theatre visit, for each sex, 1985/86

Mean spending to nearest 5 pence. Mean amounts based only on those spending on the relevant items. Base-all respondents

Men were more likely than women to spend money on eating out, petrol and parking, and sweets etc outside the theatre. Women were more likely than men to spend money on public transport, and in-house purchases. However, only in the case of eating out was there a substantial percentage differences between the sexes. Men who spent money on all the items examined, with the exception of taxis, spent more per head than women who spent money on any of these items. It is unlikely that this was due to social customs of men paying for women's theatre outings, since the mean amounts

spent are based on those who indicated that they or their party spent something, and since women were not significantly less likely than men to mention expenditure on any item except eating out. Women who spent money on eating out spent on average £1.20 less per head than men who spent money on eating out.

In 1985/86, 21% of those women who travelled by public transport, compared with 15% of men, did not incur any additional expenditure on public transport, indicating a higher proportion of pass holders among women than among men.

The following tables show the percentage of each age' group who spent money on each of the major items or types of item directly related to the theatre visit in 1985/86, and their mean spending on each item.

	<u>Age group</u>						
	<u>16-</u>	<u>19-</u>	<u>25-</u>	<u>35-</u>	<u>45-</u>	<u>55-</u>	<u>65 and</u>
	<u>18</u>	<u>24</u>	<u>34</u>	<u>44</u>	<u>54</u>	<u>64</u>	<u>over</u>
Weighted base	747	1365	1501	1172	761	451	269
<u>Spent money on</u>	%	%	%	%	%	%	%
Eating out	63	66	72	76	77	73	66
Public transport	54	56	46	42	42	38	34
Petrol and parking	10	13	22	28	29	19	10
Sweets etc in house	49	54	64	64	58	54	36
Sweets etc outside	20	21	21	22	20	11	10
Babysitting	6	5	6	10	5	-	5
Accommodation	6	5	5	4	6	6	5
Taxis	6	7	7	9	9	11	9

Fig 7-5 (a) Percentage of each age group spending money
on items directly related to the theatre visit,
1985/86

Base=all respondents

	<u>Age group</u>						
	<u>16-</u>	<u>19-</u>	<u>25-</u>	<u>35-</u>	<u>45-</u>	<u>55-</u>	<u>65 and</u>
	<u>18</u>	<u>24</u>	<u>34</u>	<u>44</u>	<u>54</u>	<u>64</u>	<u>over</u>
Weighted base	747	1365	1501	1172	761	451	269
<u>Mean spending</u>	£	£	£	£	£	£	£
Eating out	8.05	6.65	7.40	8.85	10.20	9.40	8.45
Public trans.	1.90	1.65	1.80	2.10	1.75	1.60	1.40
Petrol/parking	1.95	1.90	1.55	1.75	2.35	2.05	1.85
Sweets in house	1.00	1.00	1.25	1.05	1.05	1.10	1.15
Sweets outside	1.40	1.05	1.55	1.45	1.25	1.30	2.05
Babysitting	1.40	1.85	3.60	2.20	2.10	-	1.70
Accommodation	18.60	20.30	19.30	22.80	22.10	24.70	31.10
Taxis	2.30	2.85	2.15	2.75	2.30	3.05	3.65

Fig 7 5 (b) Mean amount of spending on items directly related to the theatre visit, for each age group, 1985/86

Mean spending to nearest 5 pence. Mean amounts based only on those spending on relevant items. Base all respondents

The 45-54's were the most likely age group to spend money on eating out, and spent considerably more per head than any other age group. The 16-18's were the least likely age group to spend money on eating out, but it was those 19-24's who spent money on eating out who spent the least per head. It was probably the case that many of the 16-18's who ate out were having their meal paid for by parents, whereas the 19-24's were more likely to pay for their own

meals, and many of them would be students on limited budgets.

The 19-24's were the most likely age group to spend money on public transport, the 65 and overs the least likely. Those 35-44's who spent money on public transport spent the most per head, the 65 and overs the least. Some of the 65 and overs would have had concessionary or free travel passes, although only 17% of this age group who did travel by public transport in 1985/86 did not incur any expenditure on public transport. 29% of the 65 and overs were from overseas, and would therefore not qualify for local authority free and reduced rate senior citizens' travel schemes.

The 45-54's were the most likely age group to spend money on petrol and parking. The 16-18's and the 65 and overs were the least likely groups to spend money on petrol and parking. Those 45-54's who did spend money on petrol and parking spent most per head, and the 25-34's least. A high percentage (42%) of the 25-34's were London borough residents in 1985/86, and therefore they would be less likely to have a long car journey than would most other age groups travelling to the theatre by car.

The 25-34's and 35-44's were the most likely age groups to spend money on in-house purchases, and the 65 and overs the least likely. Those 25-34's who spent money on in-house

purchases had the highest mean spending on these items of any age group.

The 35-44's were the most likely age group to spend money on drinks, sweets etc outside the theatre, and the 65 and overs the least likely. Those 65 and overs who did spend money on this type of purchase, however, had the highest mean spending on these items of any age group.

The 35-44's were the most likely age group to spend money on babysitting. This was the age group most likely to have children old enough to be left for the evening but young enough to still require a baby-sitter. The 55-64's were the least likely to spend money on baby-sitting - no one in this age group did so. Those 25-34's who spent money on babysitting spent considerably more than any other age group.

There were only small differences between the age groups in the percentage spending money on accommodation. Those 65 and overs who did spend money on accommodation spent most per head. Those 35 and overs who spent money on accommodation spent considerably more per head than those under 35's who did so.

The 55-64's were the most likely age group to spend money on taxis, but those 65 and overs who spent money on taxis spent considerably more per head on taxis than any other

age group.

The following tables show the percentage of each of the four frequency groups analysed in section 1 of Chapter 4 who spent money on each of the major items or types of item directly related to the theatre visit in 1985/86, and their mean spending on each item.

Frequency group (London theatre-going)

	<u>New</u>	<u>Occas-</u>		
	<u>Visitors</u>	<u>ionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	1940	1688	2063	573
<u>Spent money on</u>	%	%	%	%
Eating out	79	72	65	61
Public transport	47	55	44	39
Petrol and parking	10	18	28	28
Sweets etc in house	44	55	68	69
Sweets etc outside	18	20	21	20
Babysitting	6	6	6	6
Accommodation	5	5	5	5
Taxis	10	11	5	3

Fig 7-6 (a) Percentage of each frequency group spending money on items directly related to the theatre visit, 1985/86

Base=all respondents

Table continued on next page.

Frequency group (London theatre-going)

	<u>New</u>	<u>Occas-</u>	<u>Frequent</u>	<u>Regulars</u>
	<u>Visitors</u>	<u>ionals</u>		
Weighted base	1940	1688	2063	573
<u>Mean spending</u>	£	£	£	£
Eating out	7.20	8.70	8.95	7.55
Public transport	1.55	1.75	2.05	2.00
Petrol and parking	2.85	2.00	1.65	1.35
Sweets etc in house	1.00	1.10	1.15	1.20
Sweets etc outside	1.20	1.35	1.40	1.55
Babysitting	2.05	2.60	2.10	3.25
Accommodation	20.20	20.25	21.25	22.40
Taxis	2.40	2.70	2.65	3.90

Fig 7-6 (b) Mean amount of spending on items directly related to the theatre visit, for each frequency group, 1985/86

Mean spending to nearest 5 pence. Mean amounts based only on those spending on the relevant items.

Base=all respondents

The likelihood of respondents spending money on eating out decreased as frequency of London theatre-going increased. However, frequent theatre-goers who spent money on eating out spent most per head and new visitors least.

Occasional theatre-goers were the most likely group to spend money on public transport, regular theatre-goers

least likely. New visitors who spent money on public transport spent the least per head, probably because many of this frequency group would be visitors to London and would be staying in centrally located hotels. Frequent theatre-goers who spent money on public transport spent the most per head. 18% of those new visitors who travelled by public transport in 1985/86 incurred no expenditure in this category, and so would have had some kind of travel pass. Only 4% of those occasional theatre-goers who travelled by public transport in 1985/86 incurred no expenditure in this category. For frequent theatre-goers, the comparable figure was 17%, and for regular theatre-goers, who were the most likely group of public transport users to have passes, 25%.

Frequent and regular theatre-goers were more likely to spend money on petrol and parking than occasional theatre-goers or new visitors were, but new visitors who spent money on petrol and parking spent the most per head, whereas regular theatre-goers spent least.

Regular theatre-goers were the most likely group to make in-house purchases, and spent most per head of those who did so. The likelihood of making in-house purchases, and the amount spent per head, increased as frequency of theatre-going increased.

There was not such a direct relationship between purchases

of sweets, drinks etc outside the theatre and frequency of theatre-going as there was for in-house purchases. Frequent theatre-goers were the most likely to make this type of purchase, while those regular theatre-goers who spent money on these items spent most per head.

All frequency groups were equally likely to spend money on babysitting, but regular theatre-goers who spent money on babysitting spent considerably more per head than the other frequency groups. The same pattern was found in spending on accommodation.

Occasional theatre-goers were the most likely group to spend money on taxis, but regular theatre-goers who spent money on taxis spent considerably more per head than the other frequency groups.

The following table shows selected demographic and theatre-going frequency variations between those who spent and did not spend money on each of the major items or types of item directly related to the theatre visit.

	<u>Eating out</u>		<u>Public transport</u>	
	<u>expenditure</u>		<u>expenditure</u>	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Weighted base	4440	1824	2808	3422
	%	%	%	%
Overseas	44	20	42	32
London boroughs	28	59	31	42
Rest U.K.	28	21	27	26
Female	46	57	50	49
Mean age (actual) ⁽¹⁰⁾	36	32	33	37
Mean frequency	2	2	2	2
(actual) ⁽¹¹⁾				

	<u>Petrol/parking</u>		<u>Sweets in house</u>	
	<u>expenditure</u>		<u>expenditure</u>	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Weighted base	1248	4950	3590	2602
	%	%	%	%
Overseas	9	44	31	46
London boroughs	50	34	40	33
Rest U.K.	41	22	29	22
Female	48	50	50	49
Mean age (actual)	37	34	34	35
Mean frequency	3	2	3	2
(actual)				

Fig 7-7 Selected demographic and related variations between those spending and not spending on items directly related to the theatre visit, 1985/86

Base=all respondents

Table continued on next page.

	<u>Sweets outside</u>		<u>Babysitting</u>	
	<u>expenditure</u>		<u>expenditure</u>	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Weighted base	1241	4989	370	5867
	%	%	%	%
Overseas	27	39	12	39
London boroughs	42	36	54	36
Rest U.K.	34	25	34	25
Female	46	51	49	49
Mean age (actual)	33	35	35	35
Mean frequency	2	2	2	2
(actual)				

	<u>Accommodation</u>		<u>Taxis</u>	
	<u>expenditure</u>		<u>expenditure</u>	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Weighted base	316	5877	490	5716
	%	%	%	%
Overseas	44	38	52	36
London boroughs	30	36	28	37
Rest U.K.	26	26	20	27
Female	47	49	49	49
Mean age (actual)	35	34	36	34
Mean frequency	2	2	2	2
(actual)				

Fig 7-7 Selected demographic and related variations
among those spending and not spending on items
directly related to the theatre visit, 1985/86
Base=all respondents

Those spending money on eating out/restaurants were much more likely to be visitors to London than those who did not. They were more likely to be male, and had an older mean age.

Those spending money on public transport were also more likely to be visitors to London than those who did not. They were slightly more likely to be female, and had a younger mean age.

Those spending money on petrol and parking were much more likely to be U.K. residents than those who did not. They were slightly more likely to be male, and had an older mean age and a higher mean frequency of London theatre-going.

Those making in-house purchases were more likely to be U.K. residents than those who did not. They were slightly more likely to be female, and had a younger mean age, and a higher mean frequency of London theatre-going.

Those spending money on sweets, drinks etc. outside the theatre were more likely to be U.K. residents than those who did not. They were more likely to be male and had a younger mean age.

Those spending money on babysitting were more likely to be

U.K. residents than those who did not. There was no difference in the sex distribution or in mean age or frequency of theatre-going between those who did and did not spend money on babysitting.

Those spending money on accommodation were more likely to be from overseas than those who did not. They were more likely to be male, and had a higher mean age.

Those spending money on taxis were more likely to be overseas visitors, and had a higher mean age than those who did not. There was no difference in sex distribution or in mean frequency of London theatre-going between those who spent money on taxis and those who did not.

The following tables show the overlap in spending on other items for those spending and not spending money on each of the major items or types of item directly related to the theatre visit.

	<u>Spent money on:</u>			
	<u>Eating</u>	<u>Public</u>	<u>Petrol/</u>	<u>Sweets</u>
	<u>out</u>	<u>trans.</u>	<u>Parking</u>	<u>in house</u>
Weighted base	4440	2808	1248	3590
<u>Also spent on:</u>	%	%	%	%
Eating out	100	86	56	78
Public transport	54	100	20	55
Petrol/parking	16	9	100	29
Sweets in house	63	71	83	100
Sweets outside	20	28	22	23
Babysitting	6	4	10	4
Accommodation	5	6	4	7
Taxis	9	3	8	6
	<u>Sweets</u>	<u>Baby</u>	<u>Accom-</u>	
	<u>outside</u>	<u>sitting</u>	<u>odation</u>	<u>Taxis.</u>
Weighted base	1241	370	316	490
<u>Also spent on:</u>	%	%	%	%
Eating out	70	67	76	77
Public transport	62	29	53	17
Petrol/parking	22	32	17	20
Sweets in house	67	43	77	44
Sweets outside	100	20	16	7
Babysitting	6	100	24	8
Accommodation	4	20	100	9
Taxis	3	11	15	100

Fig 7-8 (a) Relationship between spending on different items directly related to the theatre visit, 1985/86

Base=all respondents

Table continued on next page.

	<u>No spending on:</u>			
	<u>Eating</u>	<u>Public</u>	<u>Petrol/</u>	<u>Sweets</u>
	<u>Out</u>	<u>trans.</u>	<u>Parking</u>	<u>in house</u>
Weighted base	1824	3422	4950	2602
<u>Spent money on:</u>	%	%	%	%
Eating out	0	60	76	64
Public transport	22	0	52	32
Petrol/parking	30	29	0	8
Sweets in house	44	47	51	0
Sweets outside	21	14	20	16
Babysitting	7	8	5	11
Accommodation	4	4	5	3
Taxis	6	12	8	11

	<u>Sweets</u>	<u>Baby</u>	<u>Accom-</u>	
	<u>outside</u>	<u>sitting</u>	<u>odation</u>	<u>Taxis</u>
Weighted base	4989	5867	5877	5716
<u>Spent money on:</u>	%	%	%	%
Eating out	72	72	76	71
Public transport	41	46	47	48
Petrol/parking	19	19	21	20
Sweets in house	56	59	64	59
Sweets outside	0	20	21	21
Babysitting	6	0	5	6
Accommodation	5	4	0	5
Taxis	9	8	8	0

Fig 7-8 (b) Relationship between no spending and spending on different items directly related to the theatre visit, 1985/86

Base=all respondents

Those spending money on eating out were much more likely to make in-house purchases than those who did not, and were only very slightly less likely to spend money on sweets, drinks etc outside the theatre. This suggests that those who did not spend money on eating out may not have done so because they were on a limited budget.

Those spending money on public transport were much more likely to also spend money on eating out than were those who did not spend money on public transport.

9% of those who spent money on public transport also spent money on petrol and parking, equivalent to 20% of those who spent money on petrol and parking also spending money on public transport. Presumably this group parked their cars away from the central area, and came on to the theatre by public transport. 3% of those spending money on public transport, and 8% of those who spent money on petrol and parking, also spent money on taxis. This is equivalent to 17% of those spending money on taxis also spending money on public transport and 20% also spending money on petrol and parking. The combination of two or more means of transport to reach the theatre was evidently quite common.

Those making in-house purchases were more likely to also spend money on eating out than were those who did not. They were also more likely to spend money on eating out than were those purchasing sweets, drinks etc. outside the theatre.

67% of those purchasing drinks, sweets etc outside the theatre also spent money on in-house purchases. This is equivalent to 23% of those making in-house purchases also spending money on sweets, drinks etc. outside the theatre. Those making this type of purchase outside the theatre were more likely to also make in-house purchases than those who did not do so.

Those spending money on a baby-sitter were less likely to spend money on eating out than those who did not. Their available time away from home would probably be more restricted than that of theatre-goers who did not have children. It is also possible that with children in the family, budgets for a night out were more limited.

* * *

The great majority of the audience spent some money on their theatre visit in addition to the price of the ticket, and for many theatre-goers the additional amounts spent are likely to have been as much again as the cost of the ticket. The indications were that theatre-goers were likely either to spend money on several of the items examined, or on none, suggesting that some theatre-goers were on very limited budgets. If all the estimated spending by theatre-goers on items directly associated with the theatre visit is totalled, it comes to around £103 million for the 1985/86 survey period. This sum is only around £5 million less than the total gross revenue for the West End theatres during that period.⁽¹²⁾

Notes to Chapter 7

- (1) For an account of a standard methodology, see, for example, Cwi, David and Lyall, Catherine, Economic Impacts of Arts and Cultural Institutions, a model for assessment and a case study in Baltimore, National Endowment for the Arts Research Report, U.S.A., 1977.

- (2) In a more detailed economic impact study, an assessment could be made of what proportion of total spending by theatre-goers visiting London could be attributed to their theatre-going. Guidelines for this calculation would be obtained by asking visitors how important a factor London's theatres and other attractions were in their choosing to come to London, weighting the theatres against their other reasons and their relative importance, and assigning a proportion of total spending on accommodation accordingly. This would not necessarily overcome the problem of lack of precision, however, since respondents might find such an assessment complex.

(3) Gardiner, Caroline, West End theatre attendances, unpublished annual report for SWET, from 1981. Total gross revenue for the West End theatres during the nearest calendar year to the 1985/86 survey period was around £108 million. Excluding any agency fees and commissions, the mean amount spent on theatre tickets per visit, per person, during this period was £9.85. This figure was calculated by dividing the total gross revenue by the total number of paid admissions for the period.

(4) The mean amount of expenditure was calculated using the mid-points of the frequency distributions, as with mean ages and mean frequencies of London theatre-going (see notes (3) and (4), Chapter 2 for further details):

(5) See note (3) above for details of gross revenue and mean ticket prices paid during the survey period.

- (6) It should be noted that the questionnaire asked only for total expenditure on public transport. Although in this analysis, expenditure by each type of public transport user is treated as being incurred for travel on the main method of transport by which they said they travelled to the theatre, this does not preclude the possibility that public transport users may have used two or more methods of public transport to travel to the theatre. The results of this survey did not provide sufficient information to allow expenditure by users of more than one means of public transport to be divided up by the amount spent on each.
- (7) It is unlikely that there was much over-reporting of spending in this category due to some respondents including organised group travel by hired coach as expenditure on buses, since expenditure on public transport was clearly requested on the questionnaire.
- (8) Non-pass Underground passenger revenue for the financial year ended 31.3.86 was £171.2 million. Source of this figure is the London Regional Transport Annual Report and Accounts, 1985/86, published by LRT.

(9) The amount of revenue for local food businesses which was contributed by West End theatre-goers, assessed on page 11 at between £61 and £68 million during the survey period, should probably be revised downwards to allow for expenditure in theatre restaurants which may have been reported in this category, but there is not sufficient information from these results to allow restaurant spending in-house and elsewhere to be separated.

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

(11) See note (4), Chapter 2 for details of method used to calculate mean frequency of London theatre-going.

(12) See note (3) above.

CHAPTER 8 PUBLICITY, PRESS AND MEDIA

(1) Means of hearing about the production attended

Respondents were asked, in both survey periods, how they had heard about the production they were attending. They were given a list of options to choose from, which represented all the ways in which it was thought they might have heard about West End productions. Space was also left for respondents to write in any others that might apply. They were asked to tick all the answers that applied to them, so that percentages for responses to this question add to more than 100%.

17 options were listed in the questionnaire in 1981/82. The following table shows the results of this question from the 1981/82 surveys. The options are listed in the order in which they appeared in the questionnaire.

	<u>1981/82</u>
Weighted base	11649
<u>How heard about production attended</u>	%
Poster	8
Leaflet	13
The <u>London Theatre Guide</u> ⁽¹⁾	16
Display sign outside this theatre	9
Theatre programme advertisement	13
Newspaper, news item or article	15
Newspaper, classified guide	14
Newspaper, other advertisements	6
Newspaper, critics' reviews	13
Magazine, news item or article	4
Magazine, classified guide	4
Magazine, other advertisement	2
Magazine, critics' reviews	4
Radio	5
Television	7
Told by someone with me at this performance	15
Told by someone else	22
Other	5
(including mailing list, 3%)	

Fig 8-1 Distribution of the West End audience by means of hearing about the production attended, 1981/82

More than one answer possible

Base = all respondents

For the 1985/86 surveys, the number of options listed was reduced to 11, usually by condensing two or more options

into one, either because of ambiguities in the wording of some options which had become apparent on analysis of the 1981/82 results, or because of the small number of responses given for some options in 1981/82. The following sets of 1981/82 options were merged into one option in 1985/86: "told by someone with me at this performance" and "told by someone else" became "told by someone"; "newspaper classified guide" and "magazine classified guide" became "classified listings in the press"; "newspaper, other advertisements" and "magazine, other advertisements" became "press advertisements other than listings"; and all the options that had covered news items, articles and critics' reviews in both newspapers and magazine became "review or article in the press".

The option of "theatre programme advertisement" in the 1981/82 questionnaire had been intended to refer to advertising in the programme of a theatre bought at a previous performance. It was thought during the analysis of the 1981/82 results that this term might on occasion have been misinterpreted, since it was sometimes ticked, then crossed out, and a "classified guide" option substituted. The possibility of a misunderstanding of the intended definition of this option by respondents was increased by the fact that the "classified guide" options did not appear until after the "theatre programme advertisement" option in the questionnaire, and were initially concealed behind the second fold of the questionnaire. This option was therefore not included in the 1985/86 surveys, and no respondents

specified "theatre programme advertisement under the "other" option.

The option of the "West End Theatre" magazine, which was published during most the 1985/86 survey period but which is defunct at the time of writing, was included in the 1985/86 questionnaire only.

The order of some of the options was also changed in 1985/86 to minimise the possibility of respondents encountering a option which might be taken as covering the publicity source which was relevant to them, but which in fact was covered by another option. For example, in 1985/86, the option for the "London Theatre Guide" was placed after that for "classified listings in the press", in case respondents might think that the Guide referred to a regular listings magazine guide to what was on in London, rather than to the specific Guide leaflet.

There were very minor changes in the wording of some options between the two survey periods. Changes were made in the interest of brevity or clarity, but it occasionally became apparent during the analysis of the 1985/86 results that it would have been advisable to keep to the same wordings wherever possible if direct comparisons were to be made between the two survey periods. For example, in 1985/86, the 1981/82 option "display sign outside this theatre" became "display outside theatre", in the interests

of brevity. With hindsight, however, it is clear that respondents might have interpreted the 1985/86 wording as meaning "displays outside any theatre". There are, however, very few theatres which display publicity material for productions other than that playing at the theatre itself on the outside of the theatre building. Occasionally, this happens where theatres are part of a group, but the effect of this is unlikely to have caused any major difference in the results in 1985/86.

Apart from the above changes, the same options were listed in the questionnaires during both survey periods.

The following table shows the 1985/86 findings, together with those from 1981/82 re-categorised using the 1985/86 options, so that the two sets of results can be compared, bearing in mind that some of the variations in the wordings of the questions, as outlined above, may have had a minor effect on the precise comparability of the two sets of results. The re-analysed 1981/82 figures are shown after to the 1985/86 figures, in brackets. All options are listed in the order in which they appeared in the 1985/86 questionnaire.

	<u>1985/86</u>	<u>(1981/82)</u>
Weighted base	6472	11649
<u>How heard about production attended</u>	%	%
Poster	12	(8)
Display outside theatre	11	(9)
Radio	3	(5)
Television	6	(7)
Told by someone	41	(35)
Leaflet	11	(13)
Classified listings in the press	11	(16)
Press advertisements other than listings	15	(8)
Review or article in press	23	(32)
The <u>London Theatre Guide</u>	13	(16)
<u>West End Theatre</u> magazine	1	(n/a)
Other	4	(18)

(including in 1985/86, mailing list 2%, and in 1981/82, mailing list 3% and theatre programme advertisement 13%)

Fig 8-2 Distribution of the West End audience by means of hearing about the production attended, 1985/86, with 1981/82 figures re-categorised for comparison
More than one answer possible.

Base = all respondents

Word of mouth was the most important means by which respondents found out about the production attended, in both survey periods. It increased in importance in 1985/86. In 1981/82, respondents were less likely to have been told

about the production by someone accompanying them on their theatre visit than by someone else. This indicates that word of mouth from people who had probably seen the production previously was a more important source of information than friends or family hearing about the production and suggesting they should go together. Those mentioning word of mouth were more likely than those mentioning of other sources of information to be attending the theatre as part of a large group of 12 or more. One person organising an outing and informing the other group members about the production selected was evidently quite common. 10% of those mentioning word of mouth in 1981/82, and 5% in 1985/86, were part of a group of 12 or more. Average figures for the West End audience as a whole were 7% in 1981/82, and 5% in 1985/86. Those mentioning word of mouth were particularly likely not to mention any other source of information about the production attended.

As a group, reviews, articles and items in the press were the second most important means of finding out about the production attended. In 1981/82, they were only slightly behind word of mouth in importance, but in 1985/86 there was a large percentage gap in importance between word of mouth and reviews and articles. This change was likely to have been linked to the higher percentage of the audience who were from overseas in 1985/86, so that a smaller percentage of the overall audience would have been exposed to U.K. press coverage of productions. In 1981/82, items and articles in newspapers were slightly more important as

a source of information than were newspaper critics' reviews, while in magazines, articles and critics' reviews were equally important. Magazine coverage was far less important than newspaper coverage as a source of information about the production attended.

The London Theatre Guide was the joint third most important source of information in 1981/82, (with classified listings in the press), and the fourth most important in 1985/86.

In 1981/82, classified guides came joint third in importance, but in 1985/86, other forms of press advertising were mentioned by 4% more respondents than classified listings were, and other forms of press advertising became the third most important source of information in 1985/86. However, possible misinterpretations of the "theatre programme advertisement" option as a form of press advertising in 1981/82 means that precise comparisons of the importance of press advertising between the two survey periods can not be made with confidence. In 1981/82, when press advertising was divided between several options, newspaper classified guides were specified by 10% more respondents than were magazine classified guides as a source of information, and about three times as many respondents mentioned newspaper advertising other than classified guides as mentioned this type of magazine advertising, although in both cases the percentages were small. Those who had learned about the production attended through some form of press advertising

were particularly likely to have booked by phone to the box-office. 30% of them in 1981/82 and 31% in 1985/86 had done so, compared with overall average figures of 22% and 25% respectively. It is likely that many people consulting the classified listings in particular would have already decided to go to the theatre, and have scanned the listings to see what was available, following this with a phone call to the box-office. For example, in 1981/82, classified listings were particularly likely to have been consulted by children's show audiences. A number of respondents at children's shows indicated, in response to a question on what had attracted them to the production attended, that they had decided in advance to take the children for a Christmas theatre outing and the listings were then consulted to find out what was available. Phone bookings by those mentioning classified listings as a source of information may have been a fairly immediate response to seeing a phone number, probably for credit-card sales, printed next to details of a production that interested them.

Leaflets other than the London Theatre Guide came fifth in importance as a source of information in 1981/82, and joint sixth, with classified listings and displays outside the theatre, in 1985/86. Leaflets were most likely to play an important role where there was a resident company, or where a repertoire of a particular category of production was associated with that venue, so that regular repertory leaflets were produced for the venue. Both of these

factors applied to all the opera, dance and classical play performances surveyed, and leaflets were a very important source of information among their audiences. Postal booking to the box-office was very high among those mentioning leaflets, suggesting that the production of a leaflet was important in encouraging postal bookings. 25% of those mentioning leaflets as a source of information in 1981/82, and 10% in 1985/86, had booked by post to the theatre box-office, compared with overall average figures of 9% and 5% respectively.

In 1981/82, displays outside the theatre came sixth in importance, and posters seventh, but with only 1% difference in the percentage of the audience mentioning each. In 1985/86, posters came fifth in importance, although they were only slightly more important than leaflets, and displays outside the theatre joint sixth. Posters and displays outside the theatre both increased in importance in 1985/86. Posters were mentioned as a source of information most often by musical and comedy audiences. Those mentioning posters as a source of information had a high level of day of performance booking, suggesting that posters were important in influencing the impulse purchaser. 45% of those mentioning posters in 1981/82, and 62% in 1985/86, had booked on the day of performance, compared with overall average figures of 37% and 43% respectively.

Radio and television came quite low down on the list of

sources of information, with less than 10% of respondents mentioning either of the broadcast media as a source of information about the production attended in either survey period. Television was mentioned more often than radio. Broadcast media were particularly important as a source of information among musical audiences, and it is probable that the featuring of a song from the production on television or radio was an important means of publicising the performance. Those mentioning the broadcast media as a source of information about the production attended were very likely to have come into London that day specially to see the performance. It is possible that hearing a song from the production on the radio or television had influenced many of this group to make a special trip into London to see the performance. 43% of those mentioning the broadcast media as sources of information in 1981/82, and 42% in 1985/86, had come into London that day specially to see the performance, compared with overall figures of 38% and 36%, respectively.

In 1985/86, only 1% of the overall audience had heard about the production they were attending through the West End Theatre magazine. Evidently the magazine did not play a major part in publicising productions.

Several other sources of information were not listed in the questionnaire, but were written in by respondents under the "other" option. Most important of these was the mailing list. Averaged out over the audience as a whole, 3% in

1981/82 and 2% in 1985/86 had heard about the production they were attending through membership of a mailing list. This percentage was much higher for those theatres which operated a mailing list when considered individually. Mailing lists were particularly important as a source of information to the classical play, opera and dance audiences.

Other sources of information about the production attended, each mentioned by less than 2% of the audience overall were; ticket or travel agencies, Prestel, a telephone call to the theatre box-office to ask what was on, and theatre clubs. Most of these in fact fall into the category of "told by someone".

The following tables show the relative importance of the different sources of information about the production attended for each of the three area of residence groups, and the area of residence distribution of those who mentioned each of seven major types of publicity; word of mouth, press articles and reviews, press advertising (including classifieds)⁽²⁾, the London Theatre Guide, other leaflets, radio and television, and posters. For convenience, the 1981/82 categories are given in the format which corresponds to the 1985/86 categories. This applies to all the remaining tables in this section. Where relevant, 1981/82 figures are given first, 1985/86 figures follow in brackets.

Area of Residence

	<u>Overseas</u>		<u>London</u>		<u>Rest</u>	
			<u>Boroughs</u>		<u>U.K.</u>	
Weighted base	3140	(2386)	4649	(2394)	3847	(1682)
<u>How heard about</u>						
<u>production attended</u>	%		%		%	
Poster	10	(14)	8	(13)	6	(8)
Display outside theatre	14	(12)	7	(11)	6	(10)
Radio	2	(3)	5	(3)	6	(4)
Television	3	(4)	6	(6)	11	(8)
Told by someone	27	(36)	41	(43)	33	(45)
Leaflet	11	(14)	19	(11)	8	(7)
Classified listings	11	(9)	16	(12)	17	(13)
Other press ads.	8	(16)	9	(20)	4	(14)
Review/article	22	(13)	38	(31)	34	(27)
<u>London Theatre Guide</u>	31	(21)	10	(9)	12	(6)
<u>West End Theatre</u>						
magazine						
(85/86 only)	n/a	(1)	n/a	(2)	n/a	(1)
Theatre programme						
advert.(81/82 only)	13	(n/a)	14	(n/a)	11	(n/a)
Other	4	(7)	7	(4)	5	(4)

Fig 8-3 Distribution of each area of residence group, by means of hearing about the production attended

More than one answer possible

Base = all respondents

Source of Information about production attended, 1981/82

	<u>Word of Review/</u>			<u>Press Theatre</u>		<u>Radio/</u>	
	<u>Mouth</u>	<u>Article</u>	<u>Advert</u>	<u>Guide</u>	<u>Leaflet</u>	<u>TV</u>	<u>Poster</u>
Weighted							
base	4065	3768	2588	1868	1509	1281	920
<u>Area of</u>							
<u>Residence</u>	%	%	%	%	%	%	%
Overseas	21	19	22	51	23	13	35
London	47	47	40	25	57	38	40
boroughs							
Rest U.K.	32	34	38	24	20	49	25

Source of Information about production attended, 1985/86

	<u>Word of Review/</u>			<u>Press Theatre</u>		<u>Radio/</u>	
	<u>Mouth</u>	<u>Article</u>	<u>Advert</u>	<u>Guide</u>	<u>Leaflet</u>	<u>TV</u>	<u>Poster</u>
Weighted							
base	2634	1475	1558	833	729	1569	747
<u>Area of</u>							
<u>Residence</u>	%	%	%	%	%	%	%
Overseas	33	22	31	60	47	15	43
London	39	50	39	27	36	37	40
boroughs							
Rest U.K.	29	28	30	13	17	48	17

Fig 8-4 Distribution of users of selected publicity sources, by area of residence

Base = those mentioning word of mouth, press reviews and articles, press advertising, the London Theatre Guide, leaflets, radio and television, or posters as a source of information about the production attended.

In 1981/82, the most important source of information about the production attended for overseas visitors was the London Theatre Guide. Over half of all those mentioning the London Theatre Guide as a source of information in both survey periods were overseas visitors. In 1985/86, word of mouth became overseas visitors' most important source of information, having been second in importance in 1981/82.

In 1981/82, reviews and articles were nearly as important a source of information for overseas visitors as word of mouth, but in 1985/86, the percentage mentioning them decreased, and reviews and articles came well down the list in importance as sources of information for overseas visitors.

Overseas visitors were the most likely area of residence group to mention posters or the billboard displays outside theatres as sources of information. This was probably because they were more likely than U.K. residents to be walking around London during the day, while sight-seeing, and therefore to be exposed to this type of publicity.

The 1981/82 surveys included an additional question for overseas visitors on whether they had heard about the production they were attending prior to their arrival in the U.K.. 46% said that they had done so. Of them, 45% were from the U.S.A.. The other overseas groups most likely to have heard about the production prior to their

arrival in the U.K. were, in order of likelihood to have done so from Sweden, Canada, Australia, Netherlands and Israel. These are all countries where English is either the first language or is widely spoken. 39% of those overseas visitors who had heard about the production prior to their arrival in the U.K. had heard by word of mouth, 27% through the London Theatre Guide (which has a substantial number of overseas subscribers and outlets), 28% through press reviews or articles, and 10% through press advertising. Modern musicals, especially those which had had Broadway productions, were the most likely category of production to have been heard of by overseas visitors prior to their arrival in the U.K.. 29% of those overseas visitors who had heard about the production prior to their arrival in the U.K. had also booked beforehand.

Word of mouth was the most important source of information for London boroughs residents in both survey periods, and those mentioning word of mouth as a source of information in both survey periods were most likely to be from London boroughs. Reviews and articles were consistently London boroughs' residents' second most important source of information, and they were more likely than the other area of residence groups to have seen this form of press coverage about the production attended. They were also the most likely area of residence group to have seen press advertising other than classified listings. Evidently the group most likely to be reached by any kind of press coverage were locals.

Other U.K. residents were most likely to have heard about the production attended through reviews or articles in 1981/82, and through word of mouth in 1985/86. They were the most likely area of residence group to have heard about the production attended through classified listings, although only slightly more likely than London boroughs residents to have done so. They were also the most likely area of residence group to have heard about the production on radio or television. The area of residence profile of those mentioning radio and television as sources of information was almost constant over the two survey periods, with residents of the U.K. outside London accounting for just under half of them. U.K. residents from outside London were the least likely area of residence group to have seen posters, displays outside the theatre and leaflets other than the London Theatre Guide. They consistently formed the smallest area of residence group of those mentioning leaflets as a source of information, suggesting that most leaflets that inform people about West End theatre productions are in fact picked up in London.

The following tables show the relative importance of the different sources of information about the production attended for each sex, and the sex distribution of those who mentioned each of the seven major types of publicity analysed in Fig 8-4. Where relevant, 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Sex</u>			
	<u>Female</u>		<u>Male</u>	
Weighted base	6746 (3138)		4858 (3289)	
<u>How heard about</u>				
<u>production attended</u>	%		%	
Poster	8	(14)	7	(11)
Display outside theatre	8	(10)	9	(12)
Radio	5	(4)	4	(3)
Television	7	(7)	7	(5)
Told by someone	36	(44)	33	(37)
Leaflet	14	(11)	12	(11)
Classified listings	16	(11)	16	(11)
Other press ads	8	(15)	9	(16)
Review/article	31	(25)	33	(22)
<u>London Theatre Guide</u>	16	(14)	16	(13)
<u>West End Theatre</u>				
magazine (85/86 only)	n/a	(1)	n/a	(2)
Theatre programme				
advert. (81/82 only)	13	(n/a)	13	(n/a)
Other	6	(4)	5	(6)

Fig 8-5 Distribution of each sex, by means hearing about production attended

More than one answer possible

Base = all respondents

Source of information about production attended, 1981/82

	<u>Word of Mouth</u>	<u>Review/ Article</u>	<u>Press Advert</u>	<u>Theatre Guide</u>	<u>Leaflet</u>	<u>Radio/ TV</u>	<u>Poster</u>
Weighted base	4069	3758	2590	1854	1502	1273	922
<u>Sex</u>	%	%	%	%	%	%	%
Female	59	56	57	57	62	60	59
Male	41	44	43	43	38	40	41

Source of information about production attended, 1985/86

	<u>Word of Mouth</u>	<u>Review/ Article</u>	<u>Press Advert</u>	<u>Theatre Guide</u>	<u>Leaflet</u>	<u>Radio/ TV</u>	<u>Poster</u>
Weighted base	2633	1482	1561	841	718	572	739
<u>Sex</u>	%	%	%	%	%	%	%
Female	53	53	49	50	49	58	55
Male	47	47	51	50	51	42	45

Fig 8-6 Distribution of users of selected publicity sources, by sex

Base = those mentioning word of mouth, press reviews or articles, press advertising, the London Theatre Guide, leaflets, radio and television, or posters as a source of information about the production attended.

Women were more likely, in both survey periods, to have learned about the production attended by word of mouth than

by any other means. They were consistently more likely than men to have heard by word of mouth. Women were slightly more likely than men to mention posters and radio as sources of information. Women consistently accounted for the majority of those mentioning of word of mouth, reviews and articles, radio and television and posters as sources of information about the production attended, even though men outnumbered them in 1985/86 in the audience overall.

In 1981/82, men were equally likely to have learned about the production through reading reviews and articles or by word of mouth, but in 1985/86 word of mouth became a much more important source of information than reviews and articles among male theatre-goers. Men were slightly more likely than women to mention the display outside the theatre, non-classified press advertising, and, in 1985/86, the West End Theatre magazine, as sources of information about the production attended.

The following tables show the relative importance of the different sources of information about the production attended for each age group, and the age distribution of those who mentioned each of the seven major types of publicity analysed in Fig 8-4. Where relevant, 1981/82 figures are given first, 1985/86 figures follow in brackets.

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	926	2098	3142	2342	1746	908	461
<u>How heard about</u>							
<u>production attended</u>	%	%	%	%	%	%	%
Poster	9	15	10	5	5	6	5
Display outside							
theatre	8	11	10	7	7	7	7
Radio	3	5	5	6	4	5	2
Television	6	8	7	8	6	7	4
Told by someone	48	43	36	31	26	31	26
Leaflet	9	15	14	12	14	13	12
Classified listings	10	17	20	19	15	12	14
Other press ads	7	8	7	9	17	5	4
Review/article	21	30	32	35	34	42	33
<u>London Theatre Guide</u>	15	20	14	15	19	18	17
Theatre programme							
advert (81/82 only)	8	14	12	12	12	17	13
Other	3	4	4	5	7	9	10

Fig 8-7 (a) Distribution of each age group, by means of hearing about production attended, 1981/82

More than one answer possible

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	768	1412	1548	1212	762	429	258
<u>How heard about</u>							
<u>production attended</u>	%	%	%	%	%	%	%
Poster	21	24	9	5	6	6	4
<u>Display outside</u>							
theatre	12	19	12	6	7	5	11
Radio	5	6	2	2	3	1	4
Television	4	5	6	4	10	9	8
Told by someone	49	46	36	42	34	31	31
Leaflet	18	8	11	10	10	12	7
Classified listings	10	11	11	13	11	14	10
Other press ads	13	16	17	12	17	15	18
Review/article	17	23	24	26	23	20	21
<u>London Theatre Guide</u>	13	16	13	14	14	13	10
<u>West End Theatre</u>							
magazine (85/86 only)	1	1	2	*	3	1	-
Other	3	3	5	6	8	11	12

Fig 8-7(b) Distribution of each age group, by means of hearing about production attended, 1985/86

More than one answer possible

Base = all respondents

Source of information about production attended, 1981/82

	<u>Word of Review/</u>	<u>Press</u>	<u>Theatre</u>		<u>Radio/</u>		
	<u>Mouth</u>	<u>Article</u>	<u>Advert</u>	<u>Guide</u>	<u>Leaflet</u>	<u>TV</u>	<u>Poster</u>
Weighted							
base	4064	3756	2601	1855	1505	1274	913
<u>Age group</u>	%	%	%	%	%	%	%
16-18	11	5	5	7	5	6	8
19-24	22	17	20	22	21	20	32
25-34	28	27	29	23	28	27	30
35-44	18	22	21	18	18	23	12
45-54	11	16	14	16	16	13	9
55-64	7	10	8	10	9	9	7
65 and over	3	4	4	4	4	2	3
Mean age (3)							
(actual)	34	38	36	37	36	36	32

Fig 8-8 (a) Distribution of users of selected publicity sources, by age group, 1981/82

Base = those mentioning word of mouth, press reviews or articles, press advertising, the London Theatre Guide, leaflets, radio and television, or posters, as a source of information about the production attended.

Source of information about production attended, 1985/86

	<u>Word of Mouth</u>	<u>Review/ Article</u>	<u>Press Advert</u>	<u>Theatre Guide</u>	<u>Leaflet</u>	<u>Radio/ TV</u>	<u>Poster</u>
Weighted base	2633	1481	1562	840	718	573	764
<u>Age group</u>	%	%	%	%	%	%	%
16-18	14	9	10	11	18	10	19
19-24	26	22	21	27	17	25	45
25-34	22	26	26	24	25	23	18
35-44	20	22	19	21	18	12	7
45-54	10	12	13	8	11	17	6
55-64	5	6	7	7	8	8	3
65 and over	3	4	4	3	2	4	1
Mean age (actual)	32	34	35	33	33	35	27

Fig 8-8 (b) Distribution of users of selected publicity sources, by age group, 1985/86

Base = those mentioning word of mouth, press reviews or articles, press advertising, the London Theatre Guide, leaflets, radio and television, or posters as a source of information about the production attended.

All the under 35 age groups were consistently more likely to have heard about the production they were attending by word of mouth than by any other means. The 16-18's were consistently the most likely age group to have heard by word of mouth. Around half of them in both survey periods

had been told about the production attended by someone.

In 1981/82, the 35-64 age groups were more likely to have learned about the production through reading reviews and articles than by any other method. This changed in 1985/86, when word of mouth became the most important source of information among all age groups. The 55-64's were the most likely age group to have learned about the production attended through reading reviews and articles in 1981/82, the 35-44's in 1985/86. Those mentioning articles and reviews had the oldest mean age of those groups examined in detail in 1981/82.

Posters were more important as a source of information among the under 35's than among the 35 and overs. The 19-24's were consistently the most likely age group to have seen posters. The same pattern was found for displays outside the theatre. Those mentioning posters as a source of information had a consistently younger mean age than those mentioning any of the other sources of information examined in detail.

Radio was most often mentioned as a source of information by the 35-44's in 1981/82 and by the 19-24's in 1985/86, although the percentage differences between those mentioning radio in each age group were small. In 1981/82, the 19-24's and 35-44's were the most likely to mention television as a source of information, and in 1985/86, it

was the 55-64's, but as with radio, the percentage differences between each age group were small.

The 25-34's were the most likely age group to mention classified listings as a source of information in 1981/82, the 55-64's in 1985/86. The 45-54's in 1981/82, and the 65 and overs in 1985/86, were the most likely age groups to mention press advertising other than classified listings.

The 19-24's were consistently the most likely age group to have made use of the London Theatre Guide.

In 1985/86, the 45-54's were the most likely age group to have heard about the production attended through the West End Theatre magazine.

In 1981/82, the 55-64's were the most likely age group to mention a theatre programme advertisement as a source of information.

The following tables show the relative importance of the different sources of information about the production attended for each of the four frequency groups of London theatre-going analysed in section 1 of Chapter 4, and the distribution of London theatre-going frequency among those who mentioned each of the seven major types of publicity analysed in Fig B-4. Where relevant, 1981/82 figures are given first, 1985/86 figures follow in brackets.

Frequency group (London theatre going)

New

Visitors Occasionals Frequent Regulars

Weighted base 2543(1997) 2791(1728) 4552(2136) 1750 (574)

How heard about production

<u>attended</u>	%	%	%	%
Poster	8 (12)	7 (11)	9 (14)	9 (13)
Display outside				
theatre	11 (11)	8 (11)	8 (9)	7 (20)
Radio	6 (3)	4 (5)	5 (2)	3 (2)
Television	10 (6)	9 (6)	6 (5)	4 (9)
Told by someone	36 (46)	36 (38)	37 (42)	29 (30)
Leaflet	7 (10)	7 (9)	13 (11)	31 (19)
Classified				
listings	13 (8)	15 (11)	17 (13)	16 (18)
Other press ads.	8 (15)	7 (14)	8 (17)	9 (16)
Review/article	25 (15)	28 (25)	36 (26)	40 (36)
<u>London Theatre</u>				
<u>Guide</u>	18 (12)	17 (14)	16 (16)	14 (10)
<u>West End Theatre</u>				
magazine				
(85/86 only)	n/a (1)	n/a (2)	n/a (2)	n/a (2)
Theatre programme advert				
(81/82 only)	10 (n/a)	12 (n/a)	13 (n/a)	17 (n/a)
Other	3 (4)	3 (3)	4 (5)	14 (13)

Fig 8-9 Distribution of each frequency group, by means of hearing about production attended

More than one answer possible

Base = all respondents

Source of information about production attended, 1981/82

	<u>Word of Review/</u> <u>Mouth</u>	<u>Press</u> <u>Article</u>	<u>Theatre</u> <u>Advert</u>	<u>Guide</u>	<u>Leaflet</u>	<u>Radio/</u> <u>TV</u>	<u>Poster</u>
Weighted base	4065	3754	2602	1855	1503	1275	913
<u>Visits in</u> <u>previous</u> <u>12 months</u>	%	%	%	%	%	%	%
This is first visit	23	17	20	24	12	27	23
1 other	13	10	12	13	7	14	10
2 others	12	11	13	13	7	13	9
3-6 others	29	28	28	27	21	28	29
7-11 others	12	16	13	12	18	9	13
12 or more others	12	18	14	13	35	9	16
Mean frequency (actual) ⁽⁴⁾	2	3	3	2	4	2	3

Fig 8-10 (a) Distribution of users of selected publicity sources, by frequency of London theatre-going, 1981/82

Base = those mentioning word of mouth, press reviews or articles, press advertising, the London Theatre Guide, leaflets, radio and television, or posters as a source of information about the production attended.

Source of information about production attended, 1985/86

	<u>Word of Review/</u>	<u>Press</u>	<u>Theatre</u>		<u>Radio/</u>		
	<u>Mouth</u>	<u>Article</u>	<u>Advert</u>	<u>Guide</u>	<u>Leaflet</u>	<u>TV</u>	<u>Poster</u>
Weighted							
base	2636	1482	1562	843	709	575	745
<u>Visits in</u>							
<u>previous</u>							
<u>12 months</u>	%	%	%	%	%	%	%
This is first							
visit	35	20	28	27	28	31	30
1 other	13	13	16	20	9	10	13
2 others	13	15	10	9	15	21	12
3-6 others	25	22	26	27	20	20	26
7-11 others	8	15	10	11	13	6	10
12 or more							
others	6	15	10	6	16	12	10
Mean frequency							
(actual)	2	3	2	2	2	2	2

Fig 8-10 (b) Distribution of users of selected publicity sources, by frequency of London theatre-going, 1985/86

Base = those mentioning word of mouth, press reviews or articles, press advertising, the London Theatre Guide, leaflets, radio and television, or posters as a source of information about the production attended.

In both survey periods, word of mouth was the most important source of information about the production attended for all frequency groups except regulars. Reviews and articles were a more important source of information for regulars than word of mouth was, in both survey periods.

The importance of reviews and articles as a source of information increased as frequency of theatre-going increased. Those mentioning reviews and articles had the highest mean frequency of London theatre-going in 1985/86. They were the only group of those examined in detail in 1985/86 to have a mean frequency of London theatre-going of more than other 2 visits in 12 months.

Leaflets were also a very important source of information to the regular theatre-goer, much more so than for any other frequency group. In 1981/82 they were the second most often mentioned source of information among regular theatre-goers, more important than word of mouth. In 1981/82, those mentioning leaflets had the highest mean frequency of London theatre-going of those groups examined in detail, with over a third of all those mentioning leaflets as a source of information claiming to have made at least 12 other visits to London theatres in the previous 12 months. In 1985/86, with a large increase in the percentage of those mentioning leaflets who were making their first visit in 12 months to a London theatre, mean frequency of London theatre going among those mentioning

leaflets decreased, although they still contained the highest percentage who had made 12 or more other visits to London theatres in the past 12 months.

Frequent and regular theatre-goers were more likely to have consulted classified listings than the less frequent theatre-goers were. There was no consistent pattern in use of other forms of press advertising according to frequency of theatre going.

In 1981/82, the less frequent the theatre-goer, the more likely they were to have heard about the production on television, and those mentioning radio and television contained the highest percentage who were making their first visit in 12 months to a London theatre. In 1985/86, however, it was the regular theatre-goers who were most likely to mention television as a source of information.

In 1981/82, the percentage mentioning theatre programme advertisement as a source of information increased as frequency of theatre-going increased. Although this might indicate that this term was in fact correctly interpreted by the majority of respondents, since the more frequent the theatre-goer, the more likely they were to have been exposed to advertisements in theatre programmes, it is also the case that new visitors by definition would not have been exposed to any theatre programme advertising in London theatres in the previous 12 months, yet 10% of them

mentioned this as a source of information. Advertisements for some West End productions might have been seen, however, in the programmes of regional and overseas theatres, where they occasionally appear.

Regular theatre-goers were much more likely than the other frequency groups to write in a source of information under the "other" option. Almost all of the regular theatre-goers who did so wrote in "mailing list". Overall, 12% of regular theatre-goers in both survey periods had heard about the production they were attending through membership of a mailing list (this figure was, of course, much higher for surveys at those theatres for which a mailing list was available) compared with less than 3% overall of any other frequency group. Regular theatre-goers probably joined mailing lists because of a strong interest in theatre, but mailing lists may also have played a part in encouraging regular theatre-going.

(2) Press and media use

Questions on readership of daily and Sunday newspapers and of periodicals, and on radio listening, were asked only of U.K. residents. It was assumed that as a group overseas visitors were unlikely to be regular readers of the main U.K. publications or regular listeners to U.K. radio stations. While a small percentage might have been, it was not thought to be worthwhile analysing replies from all overseas visitors in order to obtain figures for the expected small minority of overseas visitors to whom these questions might be relevant. The questionnaires in both survey periods indicated that *overseas visitors should not* answer the questions on readership and radio listening.

In 1981/82, respondents were asked to list all those daily, Sunday and local papers which they read for most issues, and to select from a list those periodicals they read regularly and those radio stations they listened to on most days. In 1985/86, respondents were asked to list all those daily and Sunday papers and magazines and periodicals they read for most issues. The question on periodical readership was left open in 1985/86 in case any publications which were important among theatre-goers had not been covered by the 1981/82 surveys. Radio listening was not included in the 1985/86 surveys.

(a) Daily newspapers read

The following table shows the percentage of the U.K. resident audience who regularly read each of those daily papers which were mentioned by more than 1% of respondents.

Today did not appear until after the 1981/82 survey period, and so there are no figures for Today in the 1981/82 results, while the Independent was not launched until after the completion of the 1985/86 surveys, and so does not figure in the results from either survey period.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	8507	4097
<u>Daily papers read</u>	%	%
<u>Times</u>	21	19
<u>Guardian</u>	21	18
<u>Mail</u>	14	14
<u>Telegraph</u>	21	11
<u>London Evening Standard</u>	15	10
<u>Express</u>	7	6
<u>Financial Times</u>	5	4
<u>Mirror</u>	4	4
<u>Sun</u>	2	3
<u>Herald Tribune</u>	1	2
<u>Today</u>	n/a	1
<u>Star</u>	1	1
Other	1	1
Read none regularly	20	32

Fig 8-11 Distribution of the U.K. resident audience,
by daily papers read

More than one answer possible

Base = all U.K. residents

The percentages for readership in this table represent the percentage of U.K. resident theatre-goers in the West End audience who read a particular paper, with every theatre-goer counted once for each occasion they attended the theatre. This will obviously have made those papers read by the most frequent theatre-goers proportionately more important. When the results are weighted with weights

inversely proportional to frequency of theatre-going, so that an analysis is made of actual individuals attending the theatre, the results show the percentage of individuals attending the West End theatre who read each of the newspapers listed. The actual number of U.K. resident readers of each newspaper there were among the West End audience during each survey period, and the percentage of the total number of readers of each newspaper who attended the West End theatre, can also be estimated from these re-weighted results. These three sets of figures are given in the following table.

	<u>% of theatre-</u> <u>goers</u> <u>reading</u>	<u>readers</u> <u>(thousands)</u>	<u>% of</u> <u>readership</u> <u>attending</u> <u>theatre</u> ⁽⁵⁾
Weighted base	2826		
<u>Daily papers read</u>	<u>%</u>	<u>no.</u>	<u>%</u>
<u>Times</u>	16	340	37
<u>Guardian</u>	17	363	26
<u>Mail</u>	14	292	5
<u>Telegraph</u>	21	447	13
<u>London Evening</u>			
<u>Standard</u>	12	254	25
<u>Express</u>	9	197	3
<u>Financial Times</u>	4	82	12
<u>Mirror</u>	5	111	1
<u>Sun</u>	4	86	1
<u>Herald Tribune</u>	*	8	unav.
<u>Star</u>	1	26	*

Fig 8-12 (a) Percentage of U.K. resident theatre-goers who
read each daily paper, number of theatre-going
readers of each, and percentage of total
readership attending theatre, 1981/82

* = less than 0.5%

unav. = readership figures not available

More than one answer possible

Base = all U.K. residents

	<u>% of theatre-</u> <u>goers</u> <u>reading</u>	<u>readers</u> <u>(thousands)</u>	<u>% of</u> <u>readership</u> <u>attending</u> <u>theatre</u>
Weighted base	1707		
<u>Daily papers read</u>	<u>%</u>	<u>no.</u>	<u>%</u>
<u>Times</u>	19	559	39
<u>Guardian</u>	18	532	35
<u>Mail</u>	13	389	8
<u>Telegraph</u>	13	379	13
<u>London Evening</u>			
<u>Standard</u>	7	213	20
<u>Express</u>	6	164	3
<u>Financial Times</u>	5	155	21
<u>Mirror</u>	5	142	2
<u>Sun</u>	3	84	1
<u>Herald Tribune</u>	2	60	unav.
<u>Today</u>	1	38	unav.
<u>Star</u>	1	30	1

Fig 8-12 (b) Percentage of U.K. resident theatre-goers who
read each daily paper, number of theatre-going
readers of each, and percentage of total
readership attending theatre, 1985/86

* = less than 0.5%

unav. = readership figures not available

More than one answer possible

Base = all U.K. residents

In 1981/82, 80% of the U.K. resident audience read a daily paper regularly. Although among the U.K. resident audience considered as a group, the Times, Telegraph and Guardian were equally the most often mentioned daily newspapers, when the figures were re-weighted so that individuals were analysed, the Telegraph was read by more people than any other paper, followed by the Guardian, and then the Times. The Mail, London Evening Standard, and Express came next in importance, in terms of number of theatre-going readers.

In 1985/86, the percentage of the U.K. resident audience who read a daily newspaper regularly declined to 68%. Because of a loss of attendances among the most regular U.K. resident theatre-goers in 1985/86 when compared with 1981/82, the number of individuals in the U.K. resident audience in 1985/86 was much higher, and was closer to the actual number of attendances than in 1981/82. This meant that despite a lower percentage of the U.K. resident audience reading most of the daily papers, for some papers, this was in fact equivalent to an increased readership figure. The percentage of the U.K. resident audience mentioning all the main dailies except the Mail, Mirror and Sun decreased in 1985/86, but in terms of number of U.K. resident readers among the West End audience overall, all the major daily papers except the Telegraph, Express and London Evening Standard showed an increase.

The Telegraph lost its position as the paper with the highest number of readers in 1981/82 to the Times in

1985/86, with the Guardian not far behind. Both the Times and Guardian showed a large increase in the number of theatre-going readers of each in 1985/86. The number of Mail readers in the West End audience also increased by a large amount, and in 1985/86, the Mail had more readers than the Telegraph. Although the Herald Tribune had a relatively small number of U.K. resident readers in both survey periods, there was a large percentage increase in their numbers in 1985/86.

When making decisions on which daily newspapers to advertise in, theatre managements would have to consider the implications of the four different sets of figures, i.e., the percentage of the U.K. resident audience for West End theatres who read each paper, the percentage of individual U.K. resident theatre-goers who did so, the number of actual readers of each paper among theatre-goers, and the percentage of readers of each paper who actually go to the West End theatre. This last figure would be a particularly important one to consider in relation to the relative cost of advertising in a paper. Since advertising costs in newspapers reflect circulation figures to a large extent, it would be necessary to take account of what percentage of readers would be likely to attend the West End theatre. For example, advertising in a large circulation paper such as the Sun would be unlikely to be as cost effective as advertising in a relatively small circulation paper such as the Guardian, since a much smaller percentage of readers of the former than of the

latter attend the West End theatre. Some further examples will serve to illustrate the complexity of making informed decisions on where to place press advertising. In 1981/82, the Times and Guardian were read by the same percentage of the U.K. resident audience, but the Guardian had more theatre-going readers, while a higher percentage of Times readers attended the theatre. In 1981/82, the Telegraph was read by the same percentage of the U.K. resident audience as the Times and Guardian, but had many more readers. The number of readers of the London Evening Standard was much lower than that of the Telegraph, in both survey periods, but a higher percentage of London Evening Standard readers attended the West End theatre.

The remaining tables in this section on daily newspaper readership concentrate on an analysis of the basic weighted data as presented in Fig 8-11.

The following table shows the distribution of daily newspaper readership among London boroughs residents and other U.K. residents. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Area of Residence</u>			
	<u>London boroughs</u>		<u>Rest U.K.</u>	
Weighted base	4659 (2408)		3839 (1684)	
<u>Daily papers read</u>	%		%	
<u>Times</u>	26	(24)	14	(12)
<u>Guardian</u>	26	(19)	15	(17)
<u>Mail</u>	12	(12)	16	(17)
<u>Telegraph</u>	17	(10)	25	(12)
<u>London Evening Standard</u>	21	(13)	8	(5)
<u>Express</u>	5	(5)	11	(7)
<u>Financial Times</u>	6	(5)	4	(3)
<u>Mirror</u>	3	(5)	5	(5)
<u>Sun</u>	2	(3)	3	(5)
<u>Herald Tribune</u>	1	(2)	*	(1)
<u>Today</u>	n/a	(1)	n/a	(1)
<u>Star</u>	1	(1)	1	(1)
Other	1	(1)	2	(1)
Read none regularly	19	(31)	21	(34)

Fig 8-13 Distribution of London boroughs residents and other U.K. residents, by daily papers read

* = less than 0.5%

More than one answer possible

Base=all U.K. residents

London boroughs residents were more likely than other U.K. residents to read a daily paper regularly. They were more likely to be Times or Guardian readers, although there was an increase in the level of Guardian readership among the

rest U.K. group in 1985/86, while it decreased among London boroughs residents. The rest U.K. group were more likely than London boroughs residents to be Mail or Telegraph readers, although their Telegraph readership declined substantially in 1985/86 to close to the percentage level of London boroughs residents. London boroughs residents were much more likely to be London Evening Standard readers than other U.K. residents were.

The following table shows the distribution of daily newspaper readership 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	5100 (2192)	3402 (1901)
<u>Daily papers read</u>	%	%
<u>Times</u>	18 (17)	26 (21)
<u>Guardian</u>	21 (18)	21 (18)
<u>Mail</u>	15 (17)	13 (10)
<u>Telegraph</u>	19 (10)	24 (13)
<u>London Evening Standard</u>	16 (10)	14 (11)
<u>Express</u>	8 (7)	6 (4)
<u>Financial Times</u>	3 (3)	9 (6)
<u>Mirror</u>	4 (5)	4 (4)
<u>Sun</u>	2 (2)	3 (5)
<u>Herald Tribune</u>	1 (2)	1 (2)
<u>Today</u>	n/a (1)	n/a (1)
<u>Star</u>	1 (1)	1 (1)
Other	2 (2)	1 (2)
Read none regularly	22 (33)	18 (31)

Fig 8-14 Distribution of each sex of U.K. residents,
by daily papers read

More than one answer possible

Base = all U.K. residents

Men were more likely than women to read a daily paper regularly. For men, the Times, Telegraph and Guardian were consistently the three most often read papers. The three most read papers among women were the Guardian, Telegraph and Times in 1981/82, and the Guardian, Mail and Times in

1985/86. Both sexes showed a decline in readership of their most often read paper in 1985/86. Women were consistently more likely than men to be readers of the Mail and Express, and men more likely than women to be readers of the Financial Times and Sun.

The following table shows the distribution of daily newspaper readership 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	684	1611	2414	1652	1223	614	304
<u>Daily papers read</u>	%	%	%	%	%	%	%
<u>Times</u>	16	19	22	21	20	25	21
<u>Guardian</u>	14	24	27	22	17	14	12
<u>Mail</u>	19	16	12	14	14	11	11
<u>Telegraph</u>	22	15	14	22	30	34	33
<u>London Evening</u>							
<u>Standard</u>	12	20	17	13	11	11	9
<u>Express</u>	11	8	12	7	10	8	9
<u>Financial Times</u>	2	4	5	7	6	6	4
<u>Mirror</u>	5	6	4	3	2	3	2
<u>Sun</u>	4	3	3	2	2	1	1
<u>Herald Tribune</u>	1	1	1	1	1	*	-
<u>Star</u>	1	1	1	*	1	1	1
Other	1	2	1	2	2	1	1
Read none regularly	21	21	21	20	15	16	22

Fig 8-15 (a) Distribution of each age group of U.K. residents, by daily papers read, 1981/82

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

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	425	945	1012	804	502	243	142
<u>Daily papers read</u>	%	%	%	%	%	%	%
<u>Times</u>	9	12	23	22	29	19	18
<u>Guardian</u>	8	18	27	19	13	17	7
<u>Mail</u>	20	14	11	15	12	11	10
<u>Telegraph</u>	8	8	7	12	19	22	21
<u>London Evening</u>							
<u>Standard</u>	10	20	9	6	6	5	4
<u>Express</u>	11	9	2	4	5	8	6
<u>Financial Times</u>	2	2	6	7	5	2	2
<u>Mirror</u>	3	8	4	2	6	3	4
<u>Sun</u>	9	3	2	2	8	1	-
<u>Herald Tribune</u>	1	3	1	4	2	1	1
<u>Today</u>	1	1	2	1	1	*	1
<u>Star</u>	1	1	1	1	1	1	1
Other	-	1	1	1	2	1	1
Read none regularly	40	33	34	29	21	31	43

Fig 8-15 (b) Distribution of each age group of U.K. residents, by daily papers read, 1985/86

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

The 16-18's read the Telegraph more often than any other paper in 1981/82 and the Mail in 1985/86. Although one of the least likely age groups to read any daily papers

regularly, a consistently higher percentage of the 16-18's than of any other age group read the Mail and Sun.

The 19-24's were more likely to read the Guardian than any other paper in 1981/82, and the London Evening Standard in 1985/86. They were the only age group whose level of readership of the London Evening Standard did not decrease in 1985/86. This age group were the most likely to be London Evening Standard and Mirror readers.

The 25-34's were consistently more likely to read the Guardian than any other paper, and they were the most likely age group to be Guardian readers. Unlike almost all the other age groups, their level of Guardian readership did not decline in 1985/86.

The 35-44's were equally likely to read both the Guardian or the Telegraph more than any other daily papers in 1981/82, but in 1985/86, a higher percentage of this age group read the Times than read any other paper. They were the most likely age group to read the Financial Times.

The 45-54's were the most likely age group to read any daily paper regularly. The Telegraph was the most read paper among this age group in 1981/82, and the Times in 1985/86, when they were the most likely age group to be Times readers.

The 55-64's were consistently the most likely age group to be Telegraph readers, and the Telegraph was the most often read paper among this age group in both survey periods. The Times was also an important paper among this age group, and in 1981/82, they were the age group most likely to be Times readers.

The 65 and overs were the least likely age group to read any daily papers regularly. Their most often read papers were the Telegraph and Times, in both survey periods.

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

Frequency group (London theatre-going)

New

	<u>visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	1370(842)	1872(1097)	3638(1648)	1623(505)

Daily papers

<u>read</u>	<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>	
<u>Times</u>	11	(7)	15	(14)	23	(24)	31	(35)
<u>Guardian</u>	12	(13)	15	(11)	24	(23)	29	(26)
<u>Mail</u>	16	(15)	17	(19)	13	(12)	11	(7)
<u>Telegraph</u>	20	(9)	24	(14)	20	(12)	18	(6)
<u>London Evening</u>								
<u>Standard</u>	7	(3)	11	(12)	18	(13)	20	(10)
<u>Express</u>	12	(8)	11	(5)	4	(6)	5	(7)
<u>Financial Times</u>	2	(1)	5	(3)	6	(6)	7	(8)
<u>Mirror</u>	7	(8)	5	(6)	3	(3)	2	(2)
<u>Sun</u>	5	(6)	3	(5)	2	(2)	1	(4)
<u>Herald Tribune</u>	*	(1)	*	(2)	*	(1)	1	(5)
<u>Today</u>	n/a	(1)	n/a	(1)	n/a	(2)	n/a	(*)
<u>Star</u>	2	(1)	1	(1)	1	(2)	*	(*)
<u>Other</u>	1	(1)	2	(1)	*	(1)	*	(*)
Read none								
regularly	26	(44)	22	(32)	18	(27)	17	(25)

Fig 8-16 Distribution of each frequency group of U.K. residents, by daily papers read

* = less than 0.5%

More than one answer possible.

Base = all U.K. residents

New visitors were the least likely frequency group to read any daily papers regularly. They read the Telegraph more often than any other daily paper in 1981/82, and the Mail in 1985/86. They were the most likely frequency group to read the Mirror, Sun and Express.

Occasional theatre-goers were, like new visitors, most likely to read the Telegraph in 1981/82 and the Mail in 1985/86.

The Guardian and Times were both important papers among frequent theatre-goers; they were more likely to read the Guardian than any other paper in 1981/82, and the Times in 1985/86, but there was only a 1% difference between the readership figures for each of these papers in both survey periods.

Regular theatre-goers were the most likely frequency group to read a daily paper regularly, and to read more than one paper. The Times was consistently the most often read paper among this frequency group. The Guardian was also a very important paper for this frequency group. In 1981/82, they were the most likely frequency group to read the London Evening Standard, but readership of the London Evening Standard among this group showed a much larger percentage decline in 1985/86 than among other groups, and London Evening Standard readership was higher among the occasional and frequent theatre-goers than among regular

theatre-goers in 1985/86. Regular theatre-goers were consistently the most likely frequency group to read the Financial Times or the Herald Tribune.

The following table shows selected demographic and frequency of theatre-going variations between readers of the five most read daily papers.

Daily newspapers read, 1981/82

	<u>Times</u>	<u>Guardian</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Standard</u>
Weighted base	1785	1768	1774	1118	1267
	%	%	%	%	%
London boroughs	67	68	45	48	77
Female	50	59	54	62	64
Under 35	52	62	40	57	64
Mean age (actual)	37	33	40	34	33
This is first visit	8	9	15	18	8
12 or more others	28	26	16	14	25
Mean frequency					
(actual)	4	4	3	3	4

Daily newspapers read, 1985/86

	<u>Times</u>	<u>Guardian</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Standard</u>
Weighted base	773	734	450	568	407
	%	%	%	%	%
London boroughs	73	61	55	50	79
Female	47	51	46	64	49
Under 35	48	63	40	59	76
Mean age (actual)	37	33	40	33	29
This is first visit	8	17	20	23	7
12 or more others	22	17	7	6	11
Mean frequency					
(actual)	4	3	2	2	3

Fig 8-17 Selected demographic and related variations
between U.K. resident readers of the five most
read daily papers

Base=U.K. resident Times, Guardian, Telegraph,
Mail and London Evening Standard readers

A considerable majority of Times, Guardian and London Evening Standard readers were consistently London borough residents. The majority of Telegraph and Mail readers in 1981/82 were from outside London. In 1985/86, the majority of Telegraph readers were London borough residents, while Mail readers were evenly divided between the two area of residence groups.

In 1981/82, because of their numerical prominence among the U.K. resident audience, women accounted for the majority of readers of each of the papers examined, apart from the Times which was evenly divided between the sexes in its readership. In 1985/86, with women less predominant among the U.K. resident audience than in 1981/82, although still accounting for the majority of U.K. residents, only the Mail retained a substantial majority of female readers, and the Guardian a very slight majority of female readers; for the other four papers examined, the majority of readers were male. Mail readers were consistently the most likely to be female. Times readers were the most likely group to be male in 1981/82, Telegraph readers in 1985/86.

For the three most important dailies, the Telegraph, Times and Guardian, the age distribution of their readers remained very similar in both survey periods. Telegraph readers had the oldest mean age in both survey periods. 60% of Telegraph readers in both survey periods were aged 35 or over. Guardian and London Evening Standard readers had the youngest mean age in 1981/82. In 1985/86 the mean

age of London Evening Standard readers decreased by four years, and was the youngest of any of the groups of readers examined in detail. More than half of all London Evening Standard readers were aged under 25 in 1985/86. The majority of Guardian, Mail and London Evening Standard readers were consistently aged under 35. Times readers were the most evenly balanced between the under 35's and the 35 and overs.

Times readers consistently contained the highest percentage of theatre-goers who had made 12 or more other visits to London theatres in the past 12 months. They were the only group of those readers examined in detail who did not show a decrease in mean frequency of London theatre-going in 1985/86. London Evening Standard readers showed the largest decrease in the percentage who had made 12 or more visits in the last 12 months in 1985/86. Guardian readers showed the largest percentage increase in 1985/86 in readers who were making their first visit in 12 months to a London theatre.

The following table shows selected demographic and theatre-going frequency differences between those who do, and those who do not, read a daily newspaper regularly. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Read daily papers</u>	<u>Do not read</u>
Weighted base	6803 (2783)	1704 (1314)
	%	%
London boroughs	56 (60)	53 (55)
Female	58 (52)	65 (57)
Mean age (actual)	36 (35)	35 (33)
Mean frequency (actual)	3 (3)	2 (2)

Fig 8-18 Selected demographic and related variations
between those U.K. residents who read and do
not read a daily paper regularly

Base - all U.K. residents

Those who did read daily papers regularly were more likely to be London boroughs residents, and to be male, than those who did not. They had an older mean age and a higher mean frequency of London theatre-going than those who did not read a daily paper regularly.

(b) Sunday newspapers read

The following table shows the percentage of the U.K. resident audience who read each of those Sunday newspapers which were mentioned by more than 1% of respondents.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	8509	4086
<u>Sunday papers read</u>	%	%
<u>Sunday Times</u>	41	26
<u>Observer</u>	28	19
<u>Sunday Express</u>	13	9
<u>Sunday Telegraph</u>	11	6
<u>Mail on Sunday</u>	3	9
<u>News of the World</u>	2	5
<u>Sunday Mirror</u>	3	2
<u>Sunday People</u>	2	2
Other	1	1
Read none regularly	24	43

Fig 8-19 Distribution of the U.K. resident audience, by Sunday papers read

More than one answer possible

Base = all U.K. residents

The following table shows these results re-weighted with weights inversely proportional to frequency of theatre-going to give the percentages of individuals who read each paper, the number of U.K. resident readers of each

newspaper there were among the West End audience in each survey period, and the percentage of the total number of readers of each newspaper who attended the West End theatre, as was done for daily newspapers in Fig 8-12.

	<u>% of theatre-</u> <u>goers</u> <u>reading</u>	<u>readers</u> <u>(thousands)</u>	<u>% of</u> <u>readership</u> <u>attending</u> <u>theatre</u> ⁽⁶⁾
Weighted base	2814		
<u>Sunday papers read</u>	%	no.	%
<u>Sunday Times</u>	34	718	17
<u>Observer</u>	23	488	20
<u>Sunday Express</u>	16	331	5
<u>Sunday Telegraph</u>	11	239	10
<u>Mail on Sunday</u>	4	90	2
<u>News of the World</u>	3	67	*
<u>Sunday Mirror</u>	5	115	1
<u>Sunday People</u>	4	80	1

Fig 8-20 (a) Percentage of U.K. resident theatre-goers who read each Sunday paper, number of theatre-going readers of each, and percentage of total readership attending theatre, 1981/82

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

	<u>% of theatre-</u>		<u>% of</u>
	<u>goers</u>	<u>readers</u>	<u>readership</u>
	<u>reading</u>	<u>(thousands)</u>	<u>attending</u>
			<u>theatre</u>
Weighted base	1693		
<u>Sunday papers read</u>	<u>%</u>	<u>no.</u>	<u>%</u>
<u>Sunday Times</u>	27	793	21
<u>Observer</u>	19	561	21
<u>Sunday Express</u>	9	264	4
<u>Sunday Telegraph</u>	6	164	7
<u>Mail on Sunday</u>	9	266	10
<u>News of the World</u>	3	90	1
<u>Sunday Mirror</u>	3	88	1
<u>Sunday People</u>	2	68	1

Fig 8-20 (b) Percentage of U.K. resident theatre-goers who read each Sunday paper, number of theatre-going readers of each, and percentage of total readership attending theatre, 1985/86

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

A lower percentage of the U.K. resident audience read a Sunday paper regularly than read a daily paper regularly. Sunday newspaper readership was much more concentrated on a few papers than daily newspaper readership was.

The Sunday Times was both the most often mentioned Sunday

newspaper, and the most often mentioned of any newspaper, either daily or Sunday, in both survey periods, with many more readers among the West End audience than its nearest rivals. Although the percentage of the total U.K. resident audience who read the Sunday Times showed a large decrease in 1985/86, because the numbers of U.K. resident theatre-goers in the West End audience overall increased, actual readership of the Sunday Times increased. There were around 271,000 more theatre-going readers of the Sunday Times in 1981/82 than of its nearest rival, the Daily Telegraph, and around 234,000 more theatre-going readers of the Sunday Times in 1985/86 than of the Times, its nearest rival in the second survey period.

The Observer was the second most often read Sunday paper, and like the Sunday Times it was read by more theatre-goers than any of the daily papers, with around 41,000 more readers than the Daily Telegraph, in 1981/82, and around 2,000 more readers than the Times in 1985/86.

The most often read Sunday papers, after the Sunday Times and Observer, were the Sunday Express and Sunday Telegraph in 1981/82, and the Sunday Express and Mail on Sunday in 1985/86.

In 1981/82, although the same percentage of the U.K. resident audience read the Sunday Mirror as read the Mail on Sunday, because of a lower mean frequency of London

theatre going among Sunday Mirror readers, the Sunday Mirror had more readers than the Mail on Sunday. In 1985/86, however, the number of readers of the Mail on Sunday showed a large increase, while the number of readers of the Sunday Mirror decreased.

As with the Daily Telegraph, the percentage of the U.K. resident audience who read the Sunday Telegraph, and the number of readers of the Sunday Telegraph, decreased in 1985/86.

The Sunday Times and Sunday Express each had more theatre-going readers than their daily equivalent newspapers, and the Sunday Telegraph and Mail on Sunday fewer theatre-going readers than their daily equivalents. The Sunday Mirror had more readers than the Daily Mirror in 1981/82, and fewer in 1985/86.

The numbers of Sunday Express, Telegraph, Mirror and People readers among the U.K. resident audience decreased in 1985/86, while the number of readers of all the other Sunday papers showed large increases.

Although the Sunday Times predominated in terms of actual number of readers, a relatively small percentage of Sunday Times readers attended the West End theatre, especially when compared with the high percentage of Times readers who did so. A higher percentage of readers of the Observer

than of the other Sunday papers attended the West End theatre in 1981/82, while in 1985/86, an equal percentage of both Sunday Times and Observer readers attended the West End theatre.

The percentage of Times and Guardian readers who attended the London theatre was consistently higher than the percentage of Sunday Times and Observer readers who did so.

The remaining tables in this section on Sunday newspaper readership concentrate on an analysis of the basic weighted data as presented in Fig 8-19.

The following table shows the distribution of Sunday newspaper readership among London boroughs residents and other U.K. residents. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Area of residence</u>			
	<u>London boroughs</u>		<u>Rest U.K.</u>	
Weighted base	4654 (2397)		3832 (1669)	
<u>Sunday papers read</u>	%		%	
<u>Sunday Times</u>	46	(28)	36	(24)
<u>Observer</u>	33	(21)	21	(16)
<u>Sunday Express</u>	9	(7)	17	(11)
<u>Sunday Telegraph</u>	10	(5)	12	(7)
<u>Mail on Sunday</u>	2	(8)	4	(10)
<u>News of the World</u>	2	(5)	3	(5)
<u>Sunday Mirror</u>	3	(2)	5	(3)
<u>Sunday People</u>	2	(1)	3	(3)
Other	*	(*)	2	(*)
Read none regularly	24	(47)	23	(46)

Fig 8-21 Distribution of London boroughs residents and other U.K. residents, by Sunday papers read

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

Residents of the U.K. outside London showed a greater spread of readership of Sunday newspapers than London boroughs residents did, and London boroughs residents' readership was more concentrated on the two most important Sunday papers. Both groups were consistently more likely to read the Sunday Times and Observer than any other Sunday papers. Readership of most of the Sunday papers other than the Sunday Times and Observer was higher among U.K.

residents from outside London than among London boroughs residents.

The following table shows the distribution of Sunday newspaper readership 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	5098 (2180)	3392 (1894)
<u>Sunday papers read</u>	%	%
<u>Sunday Times</u>	39 (26)	44 (27)
<u>Observer</u>	28 (17)	29 (21)
<u>Sunday Express</u>	14 (8)	12 (10)
<u>Sunday Telegraph</u>	11 (5)	12 (6)
<u>Mail on Sunday</u>	3 (10)	3 (8)
<u>News of the World</u>	2 (5)	2 (5)
<u>Sunday Mirror</u>	4 (3)	3 (2)
<u>Sunday People</u>	3 (1)	2 (2)
Other	1 (1)	1 (1)
Read none regularly	25 (45)	22 (42)

Fig 8-22 Distribution of each sex of U.K. residents,

by Sunday papers read

More than one answer possible

Base = all U.K. residents

Men were more likely than women to read a Sunday newspaper, and their readership levels of the majority of Sunday papers were higher than those of women. Women were slightly more likely than men to be Sunday Express, Sunday Mirror and Sunday People readers in 1981/82, and slightly more likely to be Mail on Sunday and Sunday Mirror readers in 1985/86.

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

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	661	1607	2488	1621	1201	612	301
<u>Sunday papers read</u>	%	%	%	%	%	%	%
<u>Sunday Times</u>	35	39	46	45	40	38	27
<u>Observer</u>	24	28	31	27	29	28	26
<u>Sunday Express</u>	19	12	8	13	20	18	15
<u>Sunday Telegraph</u>	14	9	7	12	15	17	19
<u>Mail on Sunday</u>	4	4	2	5	3	2	2
<u>News of the World</u>	4	3	2	2	2	2	2
<u>Sunday Mirror</u>	7	4	4	3	3	2	1
<u>Sunday People</u>	2	4	3	2	1	2	2
Other	2	1	*	*	1	1	*
Read none regularly	22	27	25	22	18	21	28

Fig 8-23 (a) Distribution of each age group of U.K. residents, by Sunday papers read, 1981/82

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

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	420	938	1011	803	502	241	142
<u>Sunday papers read</u>	%	%	%	%	%	%	%
<u>Sunday Times</u>	13	18	32	32	34	24	14
<u>Observer</u>	9	14	26	19	21	24	10
<u>Sunday Express</u>	6	8	5	11	13	15	14
<u>Sunday Telegraph</u>	3	4	3	8	9	9	11
<u>Mail on Sunday</u>	9	9	9	12	8	9	2
<u>News of the World</u>	11	9	2	3	4	1	2
<u>Sunday Mirror</u>	2	2	2	1	3	2	4
<u>Sunday People</u>	1	1	1	2	4	1	1
Other	1	1	-	*	1	1	*
Read none regularly	55	49	41	35	31	40	56

Fig 8 23 (b) Distribution of each age group of U.K. residents, by Sunday papers read, 1985/86

* = less than 0.5%

More than one answer possible

Base = all U.K. residents

The 65 and overs were consistently the least likely age group to read any Sunday paper regularly, the 45-54's the most likely.

The Sunday Times was consistently the most often read Sunday newspaper among all age groups. The 25-54's were the most likely age groups to be Sunday Times readers, the

16-18's and 65 and overs least likely.

The Observer was the second most often read Sunday paper among all age groups, except the 16-18's in 1985/86 only, when the News of the World became their second most often read Sunday paper. Observer readership was consistently highest among the 25-34's.

The Sunday Express was particularly popular among the 45 and overs. It also had a high readership level among the 16-18's in 1981/82, but this group showed the largest percentage fall in Sunday Express readership in 1985/86, to become one of the least likely age groups to read it.

As with the Daily Telegraph, readership levels of the Sunday Telegraph tended to increase with age, although in 1981/82, readership of the Sunday Telegraph was also high among the 16-18's. The highest readership levels of the Sunday Telegraph were consistently found among the 65 and overs.

The highest level of Mail on Sunday readership was consistently found among the 35-44's.

The 16-18's were the age group most likely to read the News of the World, and the percentage of this age group who read the News of the World increased in 1985/86.

The following table shows the distribution of Sunday newspaper readership for each of the four frequency groups 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	1368(839)	1871(1095)	3632(1624)	1620(501)
<u>Sunday papers</u>				
<u>read</u>	%	%	%	%
<u>Sunday Times</u>	27 (12)	34 (25)	45 (32)	52 (35)
<u>Observer</u>	17 (10)	23 (12)	30 (24)	39 (34)
<u>Sunday Express</u>	20 (11)	16 (9)	12 (9)	8 (5)
<u>S. Telegraph</u>	11 (6)	13 (5)	11 (7)	12 (3)
<u>Mail on Sunday</u>	5 (11)	3 (10)	3 (10)	1 (5)
<u>News of the</u>				
<u>World</u>	3 (5)	4 (7)	2 (4)	2 (4)
<u>Sunday Mirror</u>	6 (4)	5 (2)	3 (1)	2 (1)
<u>Sunday People</u>	6 (3)	3 (1)	2 (1)	1 (1)
<u>Other</u>	1 (1)	1 (1)	* (*)	* (*)
Read none				
regularly	28 (54)	25 (44)	24 (35)	20 (30)

Fig 8-24 Distribution of each frequency group of U.K.

residents, by Sunday papers read

More than one answer possible

Base = all U.K. residents

The more frequent the theatre-goer, the more likely they were to read a Sunday paper regularly. The Sunday Times was consistently the most often read paper among all frequency groups.

Sunday Times readership was highest among regular theatre-goers, with over half claiming to read it regularly in 1981/82. They were also the most likely frequency group to read the Observer. Sunday Express readership was highest among the new visitors group, and it was their second most often read Sunday paper. The Observer was the second most important paper after the Sunday Times for each of the other three frequency categories. New visitors were the most likely group to read the Mail on Sunday, Sunday Mirror and Sunday People, and occasional theatre-goers the most likely group to read the News of the World.

The following table gives selected demographic and frequency of theatre-going variations between readers of the five most read Sunday papers.

Sunday newspapers read, 1981/82

	<u>Times</u>	<u>Observer</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Express</u>
Weighted base	3480	2379	940	250	1097
	%	%	%	%	%
London boroughs	61	64	50	37	41
Female	56	59	60	64	63
Under 35	56	57	41	57	46
Mean age (actual)	35	36	40	34	38
This is first visit	10	10	15	28	24
12 or more others	24	26	19	5	11
Mean frequency					
(actual)	4	4	3	2	3

Sunday newspapers read, 1985/86

	<u>Times</u>	<u>Observer</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Express</u>
Weighted base	1068	764	238	364	370
	%	%	%	%	%
London boroughs	62	65	47	54	43
Female	54	47	50	60	47
Under 35	51	55	36	55	39
Mean age (actual)	36	36	40	34	39
This is first visit	10	11	22	23	26
12 or more others	16	22	6	6	7
Mean frequency					
(actual)	3	4	3	2	2

Fig 8-25 Selected demographic and related variations
between U.K. resident readers of the five
most read Sunday papers

Base=all U.K. resident Sunday Times, Observer,
Sunday Telegraph, Mail on Sunday and Sunday
Express readers.

Sunday Times and Observer readers were consistently more likely to be London boroughs residents than to be from other parts of the U.K. Sunday Telegraph readers were fairly evenly divided between London boroughs residents and other U.K. residents. Sunday Express readers were more likely to live outside London than to be London boroughs residents. Mail on Sunday readers were the only group to show a major change in area of residence distribution between the two survey periods; in 1981/82, the majority were from outside London, while in 1985/86, the majority were London boroughs residents.

Women accounted for the majority of readers of each of the five most important Sunday newspapers in 1981/82. In 1985/86, they accounted for the majority of Sunday Times and Mail on Sunday readers only, with Sunday Telegraph readers being evenly divided between the sexes, and the majority of Observer and Sunday Express readers being male. Women consistently formed a higher percentage of Mail on Sunday readers than of any other of the papers examined.

Mail on Sunday readers consistently had the youngest mean age, and Sunday Telegraph readers the oldest. The mean ages of Sunday Express and Sunday Times readers increased in 1985/86, while the mean ages of readers of the other main Sunday papers examined stayed the same. Sunday Times readers consistently had a younger mean age than Times readers. Mail on Sunday readers had the same mean age as Daily Mail readers in 1981/82, and a slightly older mean

age in 1985/86. The mean ages of readers of the Sunday and Daily Telegraph were the same in both survey periods.

Sunday Times and Observer readers had a higher mean frequency of London theatre-going than readers of the other three papers examined in detail in 1981/82. In 1985/86, mean frequency of London theatre-going declined among Sunday Times readers, and Observer readers had the highest mean frequency of London theatre-going. Mail on Sunday readers consistently had a low mean frequency of London theatre-going. Mean frequency of London theatre-going among Sunday Express readers declined in 1985/86 to about the same level as that of Mail on Sunday readers. Sunday Telegraph readers consistently had a mean frequency in the middle of the range.

The following table shows selected demographic and theatre-going frequency differences between those who do, and those who do not, read a Sunday newspaper regularly. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Read Sunday papers</u>	<u>Do not read</u>
Weighted base	6493 (2308)	2016 (1778)
	%	%
London boroughs	55 (55)	56 (57)
Female	59 (52)	62 (55)
Mean age (actual)	36 (35)	35 (32)
Mean frequency (actual)	3 (3)	3 (2)

Fig 8-26 Selected demographic and related variations
between those U.K. residents who read and do
not read a Sunday paper regularly
Base = all U.K. residents

Those who read a Sunday paper regularly were slightly more likely to be from outside London than those who did not, the reverse of the situation among those who were daily paper readers. They were more likely to be male and had an older mean age than those who did not read a Sunday paper regularly; these characteristics were shared by those who did read daily papers regularly when compared with those who did not do so. Mean frequency of London theatre-going was higher among those who read a Sunday paper regularly than among those who did not in 1985/86. There was a less marked difference in mean frequency of theatre-going between the two groups than there were between those who did and did not read a daily paper regularly.

The following table shows the levels of readership of the

six most read daily papers among readers of the five most
read Sunday papers.

Sunday papers read, 1981/82

	<u>Times</u>	<u>Observer</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Express</u>
Weighted base	3502	2383	961	267	1094
<u>Daily papers read</u>	%	%	%	%	%
<u>Times</u>	35	27	19	7	11
<u>Guardian</u>	27	42	7	7	7
<u>Telegraph</u>	23	18	59	15	29
<u>Mail</u>	12	11	20	64	30
<u>Express</u>	5	4	10	14	33
<u>London Evening</u>					
<u>Standard</u>	20	18	21	20	19

Sunday papers read, 1985/86

	<u>Times</u>	<u>Observer</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Express</u>
Weighted base	1029	752	212	373	364
<u>Daily papers read</u>	%	%	%	%	%
<u>Times</u>	48	30	21	1	9
<u>Guardian</u>	27	52	8	11	7
<u>Telegraph</u>	16	7	58	12	28
<u>Mail</u>	11	9	14	63	29
<u>Express</u>	4	3	14	12	34
<u>London Evening</u>					
<u>Standard</u>	9	12	10	16	8

Fig 8-27 Distribution of U.K. resident readers of most read Sunday papers, by readership of most read daily papers

More than one answer possible

Base=U.K. resident Sunday Times, Observer, Sunday Telegraph, Mail on Sunday and Sunday Express readers.

Where an equivalent daily paper existed, each of the five groups of Sunday newspaper readers examined were more likely to read that paper than to read any other daily. Readers of the Mail on Sunday were the most likely to also read the equivalent daily newspaper. Sunday Express readers the least likely to do so. The Observer has no direct equivalent daily paper, but a very high percentage of Observer readers, much higher than for readers of any of the other Sunday papers examined, read the Guardian regularly. Sunday Telegraph readers were the most likely also to read the London Evening Standard in 1981/82, and Mail on Sunday readers were most likely to do so in 1985/86.

(c) Local Newspapers read

A question on which local newspapers were read regularly was included only in the 1981/82 surveys. The London Evening Standard was excluded from the analysis of this question, as it was analysed under the daily papers category, and would obviously have far outsold any other local papers. Respondents who wrote in London Evening Standard in answer to the question on local papers read had their replies reclassified as daily newspaper readership.

43% of respondents claimed to read a local paper regularly. When the results were re-analysed by weighting with weights inversely proportional to frequency of London theatre-going to give the number of individuals who were regular readers of a local paper, it was estimated that the West End audience in 1981/82 contained around 1.1 million U.K. residents who read a local paper regularly.

Few individual local papers were mentioned by more than 1% of respondents, and none by more than 5%. The most often mentioned papers were, in order of importance; the Hampstead and Highgate Express, the Islington Gazette, the Surrey Comet and the Kentish Times. Those counties or regions outside London whose local papers were most often mentioned were, in order of importance; Surrey, Kent, Essex, Bucks and Sussex. The importance of local papers from these areas was, however, as likely to have been a

reflection of the areas theatre-goers were most likely to come from as it was to indicate that residents of those particular areas were much more likely than other theatre-goers to read their local paper.

Although two of the four most often mentioned local papers were London papers, London boroughs residents were much less likely than other U.K. residents to read a local paper regularly. 33% of London boroughs residents and 54% of other U.K. residents claimed to read a local paper regularly.

Women were slightly more likely than men to read a local paper regularly; 47% did so compared with 44% of men.

The 16-18's and the 45-54's were the most likely age groups to read a local paper regularly; 58% of the former and 55% of the latter did so. The 19-24's were the least likely to do so, and only 36% of them read a local paper regularly.

The more frequent the theatre-goer, the less likely they were to read a local paper regularly. 53% of those who were making their first visit in 12 months to a London theatre read a local paper regularly, compared with 32% of those who had made 12 or more other visits in the previous 12 months.

The following table shows selected demographic and theatre-going frequency differences between those who do, and those who do not, read a local paper regularly. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Read local paper</u>	<u>Do not read</u>
Weighted base	3683	4807
	%	%
London boroughs	40	66
Female	65	57
Mean age (actual)	37	35
Mean frequency (actual)	3	3

Fig 8-28 Selected demographic and related variations between those U.K. residents who read and do not read a local paper regularly

Base = all U.K. residents

Those who read a local paper regularly were far more likely than those who did not to live outside London. They were more likely to be female, and had a higher mean age. There was no difference in mean frequency of London theatre-going between the two groups.

(d) Periodicals and magazines read

In 1981/82, U.K. resident respondents were asked whether they regularly read any of a given list of periodicals. The list was compiled from those which were known to include classified listings or features on London theatre. The Radio and TV Times were added to this list as it was thought likely they would be widely read. The following table gives the results of this question in 1981/82.

	<u>1981/82</u>
Weighted base	8492
<u>Periodicals read</u>	%
<u>What's On?</u>	6
<u>This is London</u>	*
<u>Where To Go</u> (7)	2
<u>London Review</u>	1
<u>Ms London</u>	8
<u>Girl About Town</u>	8
<u>Radio Times</u>	31
<u>TV Times</u>	19
<u>Time Out</u>	14
<u>City Limits</u>	5
<u>Event</u> (8)	2
None of these regularly	50

Fig 8-29 Distribution of the U.K. resident audience, by periodicals read, 1981/82

* = less than 0.5%

More than one answer possible

Base = U.K. residents

For the 1985/86 surveys, it was decided that the question on periodicals and magazines read should be left open in case any publications which were widely read among the West End audience had not been included in the 1981/82 list. This produced unsatisfactory results, however. The absence of a list to choose from resulted in a very wide range of periodicals and magazines being mentioned, the majority which were hobby or specialised interest publications, with very few titles mentioned by more than one or two individuals. Only Time Out and City Limits, Radio Times, Vogue and the Economist were each mentioned by more than 1% of respondents. Far fewer people mentioned the Radio or TV Times in 1985/86 than in 1981/82, but this is more likely to have been because they did not regard these publications as periodicals or magazines when they received no prompting, rather than that readership of these publications decreased by a large amount in 1985/86.

The following table shows the results obtained from the 1985/86 surveys. Only those publications mentioned by 1% or more of respondents are listed. All others are grouped together under a general heading. Precise comparisons can not be made with the 1981/82 results because of the likely under-reporting of readership of some publications in 1985/86 which is suggested by the relatively lower figures for Radio and TV Times readership in the second survey period.

	<u>1985/86</u>
Weighted base	4074
<u>Periodicals read</u>	%
<u>Time Out</u>	8
<u>City Limits</u>	2
<u>Vogue</u>	2
<u>Economist</u>	4
<u>Spectator</u>	1
<u>Harpers and Queen</u>	1
<u>Tatler</u>	1
<u>Radio Times</u>	2
<u>TV Times</u>	1
<u>Listener</u>	1
Free distribution	1
Theatre magazines	2
Dance magazines	3
Women's magazines not included above	11
Other periodicals not included above	8
Read none regularly	60

Fig 8-30 Distribution of the U.K. resident audience, by periodicals read, 1985/86

More than one answer possible

Base = U.K. residents

The following table shows the results for the most often mentioned publications for both survey periods, re-weighted

with weights inversely proportional to frequency of theatre-going to give the percentage of individuals who read each publication, the number of U.K. resident readers of each publication there were among the West End audiences, and the percentage of the total number of readers of each publication who attended the West End theatre, as was done for daily newspapers in Fig 8-12, and for Sunday newspapers in Fig 8-20.

	<u>% of theatre-goers reading</u>	<u>readers (thousands)</u>	<u>% of readership attending theatre⁽⁹⁾</u>
Weighted base	2809		
<u>Periodicals read</u>	<u>%</u>	<u>no.</u>	<u>%</u>
<u>Radio Times</u>	30	638	8
<u>TV Times</u>	20	416	5
<u>Time Out</u>	10	218	100
<u>City Limits</u>	3	70	98
<u>Ms London</u>	6	128	unav.
<u>Girl About Town</u>	6	124	unav.
<u>What's On</u>	4	88	unav.

Fig 8-31 (a) Percentage of U.K. resident theatre-goers who read the most read periodicals, number of theatre-going readers of each, and percentage of total readership attending theatre, 1981/82

* = less than 0.5%

unav. = circulation figures not available

More than one answer possible

Base = all U.K. residents

	<u>% of theatre-</u> <u>goers</u> <u>reading</u>	<u>readers</u> <u>(thousands)</u>	<u>% of</u> <u>readership</u> <u>attending</u> <u>theatre</u>
Weighted base	1679		
<u>Periodicals read</u>	<u>%</u>	<u>no.</u>	<u>%</u>
<u>Radio Times</u>	4	126	1
<u>TV Times</u>	3	97	1
<u>Time Out</u>	5	155	76
<u>City Limits</u>	2	68	91
<u>Spectator</u>	1	34	48
<u>Economist</u>	3	84	13
<u>Voque</u>	2	55	14

Fig 8-31 (b) Percentage of U.K. resident theatre-goers who read the most read periodicals, number of theatre-going readers of each, and percentage of total readership attending theatre, 1985/86

* = less than 0.5%

unav. = circulation figures not available

More than one answer possible

Base = all U.K. residents

Allowing for the fact that the Radio and TV Times did not feature prominently in the 1985/86 list of publications read, for reasons already stated, they were probably the most widely read publications among theatre-goers, with a much larger number of theatre-going readers in 1981/82 than for any of the other periodicals listed. However, the

percentage of the total number of readers of these publications who actually attended the West End theatre was very small.

Time Out was the most often read publication after the Radio and TV Times in 1981/82, and in 1985/86, it was the only one which more than 5% of the U.K. resident audience claimed to read regularly. Almost 100% of Time Out readers were estimated to have attended the West End Theatre at least once during the 1981/82 survey period. This figure fell to 76% in 1985/86.

In 1981/82, several other entertainment listings magazines were included in the list for respondents to select from. What's On had the highest readership after Time Out, followed by City Limits, Event, and Where to Go .

The number of City Limits readers among the West End audience was far lower than the number of Time Out readers. However, consistently more than 90% of City Limits readers were estimated to have attended the West End theatre during each of the survey periods.

The free distribution magazines, Girl About Town and Ms London, had a large number of theatre-going readers in 1981/82, coming behind only the Radio and TV Times and Time Out in importance. However, as circulation figures were not available for these publications, it was not possible

to tell what percentage of their readers attended the London theatre. In 1985/86, these magazines did not feature nearly so prominently, perhaps because, as was likely to have been the case with the Radio and TV Times, respondents would not think of free distribution publications as being periodicals which they read regularly unless prompted.

In 1985/86, several publications which had not been included in the 1981/82 listings proved to be quite important among theatre-goers, although the numbers of theatre-going readers of each was small. The most important of these were the Economist, Vogue and the Spectator. Although the Spectator is a small circulation publication, a high percentage of Spectator readers, an estimated 48%, attended the West End theatre during the 1985/86 survey period.

There were variations in periodical readership patterns between the different demographic groups. In both survey periods, London boroughs residents were more likely to read periodicals regularly than other U.K. residents were, especially the entertainment listings magazines. Those living in London would be much more likely to make use of listings magazines which concentrated on London events on a regular basis than those who did not. 20% of London boroughs residents in 1981/82 read Time Out regularly, falling to 10% in 1985/86. Figures for other U.K. residents were 6% in both survey periods. 8% of London

boroughs residents read City Limits in 1981/82, 4% in 1985/86. Figures for other U.K. residents were 2% and less than 0.5% respectively.

Women were slightly more likely than men to read periodicals regularly in both survey periods, but, except for those publications aimed specifically at a female market, there was little difference between the sexes in the percentage of each who read particular publications. Most of the women's magazines mentioned were also read by some men; for example, 3% of men in 1981/82 claimed to read either Ms London or Girl About Town regularly.

The under 35 age groups were in general less likely to read any periodicals regularly than the older age groups were. The 19-24's were consistently the most likely age group to read Time Out, while the 25-34's were the most likely age group to read City Limits.

The percentage who read any periodicals regularly decreased as frequency of London theatre-going increased, in both survey periods. Regular theatre-goers were the most likely group to be regular Radio Times readers, and new visitors were the most likely frequency group to be regular TV Times readers. 22% of regular theatre-goers in 1981/82 read Time Out regularly, falling to 12% in 1985/86. The level of City Limits readership among regular theatre-goers was 9% in 1981/82 and 5% in 1985/86.

The following table gives selected demographic and frequency of theatre-going variations between readers of the Radio and TV Times, and of the four main specialist entertainment listings magazines in 1981/82; and of the six publications mentioned most often in the 1985/86 surveys. The Radio and TV Times are not included in the detailed analysis for 1985/86 because of the probable under-reporting of readership for these two publications in the 1985/86 surveys, so that it is unlikely that comparisons could usefully be made between Radio and TV Times readers over the two survey periods.

Periodicals read

	<u>Radio</u>	<u>TV</u>	<u>Time</u>	<u>City</u>	<u>What's</u>	
	<u>Times</u>	<u>Times</u>	<u>Out</u>	<u>Limits</u>	<u>Event</u>	<u>On</u>
Weighted base	2653	1648	1173	446	184	505
	%	%	%	%	%	%
London boroughs	51	50	80	85	81	63
Female	60	63	60	59	50	64
Mean age (actual)	39	37	29	29	29	36
Mean frequency						
(actual)	3	3	5	6	4	5

Fig 8-32 (a) Selected demographic and related variations between U.K. resident readers of selected periodicals, 1981/82

Base - U.K. resident Radio Times, TV Times, Time Out, City Limits, Event, and What's On readers

	<u>Periodicals read</u>				
	<u>Time Out</u>	<u>City Limits</u>	<u>Voque</u>	<u>Econo- mist</u>	<u>Spect- ator</u>
Weighted base	340	98	81	159	57
	%	%	%	%	%
London boroughs	66	93	63	50	67
Female	51	49	75	25	36
Mean age (actual)	30	29	32	35	47
Mean frequency (actual)	4	3	3	5	2

Fig 8-32 (b) Selected demographic and related variations between U.K. resident readers of selected periodicals, 1985/86

Base = U.K. resident Time Out, City Limits, Voque, Economist and Spectator readers

Among readers of the entertainment magazines in 1981/82, London boroughs residents predominated among readers of Time Out, City Limits and Event. Although London boroughs residents also accounted for the majority of readers of What's On, readers of this magazine were more likely to be from outside London than were readers of any of the other entertainment magazines examined. Readers of the Radio and TV Times were fairly evenly divided between London boroughs residents and other U.K. residents.

The area of residence profile of Time Out readers changed in 1985/86, with a higher percentage being from outside

London than in 1981/82. City Limits readers were more likely than Time Out readers to be London borough residents in 1985/86. Spectator and Voque readers were more likely to be London borough residents than to be from other parts of the U.K., while Economist readers were evenly divided between London borough residents and other U.K. residents.

The majority of readers of the publications analysed in detail from the 1981/82 surveys were female, except in the case of Event, whose readers were evenly divided between men and women.

The percentage of Time Out and City Limits readers who were female declined in 1985/86, when there was a fairly even division between the sexes among their readership. Voque readers were predominantly female, while Economist and Spectator readers were predominantly male.

In 1981/82, the mean ages of readers of Time Out, City Limits and Event were all relatively young, much younger than that of readers of What's On. Time Out and City Limits readers continued to have a relatively young mean age in 1985/86, although the mean age of Time Out readers increased slightly. Spectator readers had a much older mean age than readers of any of the other publications examined in detail in 1985/86.

City Limits readers had the highest mean frequency of London theatre-going in 1981/82, but this fell sharply in 1985/86, when their mean frequency of theatre-going was lower than that of Time Out readers, the reverse of the 1981/82 situation. The mean frequency of theatre-going among Economist readers in 1985/86 was the highest of any of the groups of readers examined in detail in 1985/86.

The following table shows selected demographic and theatre-going frequency differences between those who did, and those who did not, read periodicals regularly. 1981/82 figures are given first, 1985/86 figures follow in brackets. 1981/82 figures refer to those who did, or did not, read any of the listed periodicals regularly, while 1985/86 figures refer to those who did, or did not, read any periodicals or magazines regularly.

	<u>Read periodicals</u>	<u>Do not read</u>
Weighted base	4228 (1625)	4264 (2449)
	%	%
London boroughs	60 (62)	49 (51)
Female	62 (53)	57 (52)
Mean age (actual)	36 (34)	36 (34)
Mean frequency (actual)	4 (3)	3 (2)

Fig 8-33 Selected demographic and related variations between those U.K. residents who read and do not read periodicals regularly

Base = all U.K. residents

Those who did read periodicals regularly were more likely to be London boroughs residents and to be female than those who did not. There was no difference in the mean ages of the two groups. Those who did read periodicals regularly had a higher mean frequency of London theatre-going than those who did not. This would be linked to the fact that many of the publications listed in both survey periods were specialist entertainment publications, which would obviously be of most interest to those who went to the theatre regularly.

(e) Radio stations listened to

In the 1981/82 surveys only, respondents were asked to select from a list those radio stations they listened to on most days. The list included all the BBC national radio stations, and those independent and BBC London stations which it was thought likely would either carry features on, or advertising for, West End theatres. The following table gives the results of this question.

	<u>1981/82</u>
Weighted base	8473
<u>Radio stations listened to</u>	%
<u>Radio 1</u>	22
<u>Radio 2</u>	20
<u>Radio 3</u>	22
<u>Radio 4</u>	40
<u>Capital Radio</u>	27
<u>Radio London</u>	4
<u>LBC</u>	12
None of these regularly	16

Fig 8-34 Distribution of the U.K. resident audience,

by radio stations listened to, 1981/82

More than one answer possible

Base = all U.K. residents

As with newspapers and periodicals, these figures were then re-weighted with weights inversely proportional to frequency of theatre-going to provide estimates of what

percentage of individual theatre-goers listened to each station, of the number of listeners to each station among the West End audience, and of the percentage of listeners to each station who attended the West End theatre during the 1981/82 survey period. The following table shows these re-weighted results.

	<u>% of theatre-</u> <u>goers</u> <u>listening</u>	<u>listeners</u> <u>(thousands)</u>	<u>% of</u> <u>listeners</u> <u>attending</u> <u>theatre</u> ⁽¹⁰⁾
Weighted base	2803		
<u>Radio stations</u>			
<u>listened to</u>	<u>%</u>	<u>no.</u>	<u>%</u>
<u>Radio 1</u>	25	530	9
<u>Radio 2</u>	25	529	14
<u>Radio 3</u>	17	366	73
<u>Radio 4</u>	37	780	24
<u>Capital Radio</u>	22	466	13
<u>Radio London</u>	5	106	unav.
<u>LBC</u>	10	208	5

Fig 8-35 Percentage of U.K. resident theatre-goers who
listen to major radio stations, number of
theatre-going listeners to each, and percentage
of total listeners attending theatre, 1981/82

unav. = listening figures not available

More than one answer possible

Base = all U.K. residents

Radio 4 was the important station, both in terms of the percentage of the total audience who listened to it, and in terms of total number of listeners. Capital Radio was listened to by a higher percentage of the overall West End audience than were any of the other BBC radio stations, but it had fewer theatre-going listeners than either Radio 1 or Radio 3. Although Radio 3 was listened to by only a very small percentage of the U.K. population⁽¹¹⁾, a very high percentage of Radio 3 listeners attended the West End theatre during the 1981/82 survey period.

The following table shows the patterns of radio listening among London boroughs residents and other U.K. residents.

Area of Residence

	<u>London Boroughs</u>	<u>Rest U.K.</u>
Weighted base	4643	3819
<u>Radio stations listened to</u>	%	%
<u>Radio 1</u>	17	28
<u>Radio 2</u>	14	28
<u>Radio 3</u>	26	17
<u>Radio 4</u>	41	38
<u>Capital Radio</u>	34	18
<u>Radio London</u>	5	4
<u>LBC</u>	16	6
None of these regularly	15	17

Fig 8-36 Distribution of London boroughs residents and other U.K. residents, by radio stations listened to, 1981/82

More than one answer possible

Base = all U.K. residents

A slightly higher percentage of London boroughs residents than of other U.K. residents listened to one of the radio stations listed on a regular basis. Both area of residence groups listened to Radio 4 more often than to any other station. Capital Radio was the station most listened to by London boroughs residents after Radio 4, Radios 1 and 2 by other U.K. residents.

Radios 1 and 2 were particularly popular with those living

outside London, while London boroughs residents were more likely to listen to Radios 3 and 4 than other U.K. residents were. A higher percentage of London boroughs residents than of other U.K. residents listened to Capital Radio and to LBC; obviously many people living outside the Greater London area would be unable to receive these stations.

The following table shows the patterns of radio listening for each sex.

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	5088	3379
<u>Radio stations listened to</u>	%	%
<u>Radio 1</u>	23	20
<u>Radio 2</u>	21	20
<u>Radio 3</u>	20	25
<u>Radio 4</u>	40	41
<u>Capital Radio</u>	28	25
<u>Radio London</u>	4	5
<u>LBC</u>	10	14
None of these regularly	15	17

Fig 8-37 Distribution of each sex of U.K. residents,
by radio stations listened to, 1981/82

More than one answer possible

Base = all U.K. residents

The differences between the sexes in patterns of radio listening were not very marked. Women were slightly more likely than men to listen to the radio regularly, and displayed a slightly greater preference than men for Radio 1, Radio 2, and Capital Radio. Men displayed a slightly greater preference than women for Radio 3, Radio 4, Radio London and LBC.

The following table shows the patterns of radio listening 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	680	1612	2401	1650	1211	612	294
<u>Radio stations</u>							
<u>listened to</u>	%	%	%	%	%	%	%
<u>Radio 1</u>	57	36	20	15	11	7	8
<u>Radio 2</u>	19	13	14	29	28	26	21
<u>Radio 3</u>	9	11	19	25	32	38	39
<u>Radio 4</u>	20	23	42	48	50	55	60
<u>Capital Radio</u>	46	47	34	16	10	7	5
<u>Radio London</u>	6	4	3	4	5	6	3
<u>LBC</u>	12	10	12	13	12	10	14
None of these							
regularly	10	17	15	17	16	16	16

Fig 8-38 Distribution of each age group of U.K. residents, by radio stations listened to, 1981/82

More than one answer possible

Base = all U.K. residents

The 16-18's were the most likely age group to listen to the radio regularly. Over half of them listened to Radio 1 regularly, and their level of Radio 1 listening was much higher than that of any other age group. Capital Radio was also very popular with this age group. Capital Radio was the most popular station with the 19-24's, and they were the age group most likely to listen to it regularly.

Radio 4 was the most popular station among all the 25 and over age groups, with the 65 and overs being the most likely age group to be Radio 4 listeners. The level of Radio 4 listening increased as age increased.

The 35-44's were the most likely age group to listen to Radio 2. The 65 and overs were the most likely to listen to Radio 3. Levels of Radio 3 listening increased with age.

The following table shows the patterns of radio listening for each of the four frequency groups of London theatre-going examined in section 1 of Chapter 4.

Frequency group (London theatre-going)

New

Visitors Occasionals Frequent Regulars

Weighted base	1363	1844	3624	1623
<u>Radio stations</u>				
<u>listened to</u>	%	%	%	%
<u>Radio 1</u>	31	28	19	12
<u>Radio 2</u>	29	24	18	13
<u>Radio 3</u>	12	14	23	38
<u>Radio 4</u>	32	38	41	49
<u>Capital Radio</u>	17	24	32	26
<u>Radio London</u>	3	4	5	4
<u>LBC</u>	7	10	13	14
None of these regularly	20	17	15	14

Fig 8-39 Distribution of each frequency group of U.K. residents, by radio stations listened to, 1981/82

More than one answer possible

Base=all U.K. residents

The more frequent the theatre-goer, the more likely they were to listen to the radio regularly. Levels of listening to Radios 3 and 4 and to LBC increased as frequency of theatre-going increased. Levels of listening to Radios 1 and 2 decreased as frequency of London theatre-going increased. Frequent theatre-goers were the most likely group to be regular Capital Radio listeners.

The following table gives selected demographic and frequency of theatre-going variations between listeners to the five most important radio stations.

	<u>Radio station</u>				
	<u>Radio 1</u>	<u>Radio 2</u>	<u>Radio 3</u>	<u>Radio 4</u>	<u>Capital</u>
Weighted base	1846	1708	1889	3423	2298
	%	%	%	%	%
London boroughs	43	38	64	57	70
Female	63	60	53	58	62
Under 35	77	37	36	43	82
Mean age (actual)	29	39	42	40	28
This is first visit	23	22	9	12	10
Mean frequency (actual)	2	3	5	3	4

Fig 8-40 Selected demographic and related variations between U.K. resident listeners to main radio stations, 1981/82

Base = U.K. resident Radio 1, Radio 2, Radio 3, Radio 4 and Capital Radio listeners

London boroughs residents predominated particularly among Capital Radio listeners. Although London boroughs residents were more likely to listen to Radio 4 than to Radio 3, they accounted for a higher percentage of listeners to the latter than to the former. Other U.K. residents accounted for the majority of Radio 1 and 2 listeners.

Because of their numerical prominence in the U.K. resident audience in 1981/82, women accounted for the majority of listeners to each of the five main radio stations, but they were less prominent among Radio 3 and Radio 4 listeners than among listeners to the other three stations examined in detail. Although Radio 1 was the station most listened to by the 16-18's, it was Capital Radio listeners who had the youngest mean age. Radio 3 listeners had the oldest mean age.

Radio 3 listeners had the highest mean frequency of London theatre-going, Capital Radio listeners the second highest mean frequency.

The following table shows selected demographic and theatre-going frequency differences between those who do, and those who do not, listen to one of the listed radio stations on most days.

	<u>Listen to radio</u>	<u>Do not listen</u>
Weighted base	7105	1368
	%	%
London boroughs	56	52
Female	60	56
Mean age (actual)	36	36
Mean frequency (actual)	3	3

Fig 8-41 Selected demographic and related variations
between those U.K. residents who listen and do
not listen to selected radio stations on most days
Base = all U.K. residents

Those who did listen to the radio regularly were more likely to be London boroughs residents, and to be female than those who did not. There was no difference in age or in mean theatre-going frequency between the two groups.

(3) Relationship between means of hearing about production attended and use of the press and media, among U.K. residents

Overseas visitors are not included in this section, since they were not asked any of the questions on readership or radio listening.

The following table shows readership levels of the five most read daily newspapers among those U.K. residents who had heard about the production attended through classified press listings and advertising, and through press reviews and articles. 1981/82 figures are given first, 1985/86 figures follow in brackets.

How heard about production attended

	<u>Press listings/ advertising</u>		<u>Press review/ article</u>	
Weighted base	2023	(1082)	3046	(1143)
<u>Daily papers read</u>	%		%	
<u>Times</u>	21	(21)	27	(27)
<u>Guardian</u>	24	(22)	25	(25)
<u>Telegraph</u>	23	(15)	17	(15)
<u>Mail</u>	13	(12)	14	(13)
<u>London Evening Standard</u>	17	(12)	15	(15)

Fig 8-42 Distribution of those U.K. residents learning about production attended from the press, by readership of most read daily newspapers

More than one answer possible

Base=all those U.K. residents hearing about production attended through the press

Although it can not be stated with certainty that the daily newspapers in which respondents saw the press listings and advertising or press reviews and articles about the production attended were necessarily those which they were most likely to read regularly, it is probable that this was the case, and the above table therefore gives a guide to those daily newspapers whose advertising and feature coverage was most likely to have reached U.K. resident West End audiences.

Those who had heard about the production attended through press listings or advertising were consistently most likely to be Guardian readers, and those who had heard about it through press reviews and articles were most likely to be Times readers. The Preview page on the arts, which was a regular Friday feature in the Times during most of the 1981/82 survey period, was specifically mentioned as a source of information by several respondents in 1981/82.

The following table shows the percentage of U.K. resident readers of each of the five most read daily newspapers, who had heard about the production attended through press listings and advertising and through press reviews and articles.

Daily papers read, 1981/82

	<u>Times</u>	<u>Guardian</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Standard</u>
Weighted base	1789	1758	1763	1101	1253
<u>How heard about</u>					
<u>production attended</u>	%	%	%	%	%
Listings/advertising	23	27	26	22	25
Review/article	46	43	29	39	36

Daily papers read, 1985/86

	<u>Times</u>	<u>Guardian</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Standard</u>
Weighted base	772	733	450	562	402
<u>How heard about</u>					
<u>production attended</u>	%	%	%	%	%
Listings/advertising	28	32	36	21	41
Review/article	40	39	38	26	43

Fig 8-43 Percentage of U.K. resident readers of most read daily papers hearing about production attended through the press

More than one answer possible

Base=U.K. resident Times, Guardian, Telegraph, Mail, and London Evening Standard readers

Guardian readers were the most likely to have heard about the production attended through press listings and advertising in 1981/82. Although those who had heard about the production attended through press listings and advertising were more likely to read the Guardian than any other daily paper in both survey periods, in 1985/86 both

Telegraph and London Evening Standard readers were more likely to have heard about the production attended through advertising than Guardian readers were. Mail readers were consistently the least likely to have heard about the production attended through advertising in the press.

Times readers were the most likely to have heard about the production through a review or article in the press in 1981/82, but in 1985/86, London Evening Standard readers were slightly more likely to have done so.

The following table shows readership levels of the five most read Sunday newspapers among those who had heard about the production attended through press listings and advertising or through press reviews and articles. 1981/82 figures are given first, 1985/86 figures follow in brackets.

How heard about production attended

	<u>Press listings/ advertising</u>		<u>Press review/ article</u>	
Weighted base	2026	(1084)	3034	(1140)
<u>Sunday papers read</u>	%		%	
<u>Sunday Times</u>	45	(29)	49	(40)
<u>Observer</u>	28	(23)	33	(28)
<u>Sunday Telegraph</u>	12	(7)	12	(7)
<u>Mail on Sunday</u>	2	(9)	3	(10)
<u>Sunday Express</u>	13	(11)	13	(7)

Fig 8-44 Distribution of those U.K. residents learning about production attended from the press, by readership of most read Sunday newspapers

More than one answer possible.

Base=all those U.K. residents hearing about production attended through the press

The Sunday Times was the most read paper both among those who had heard about the production attended both through press listings and advertising and through press reviews and articles, in both survey periods. Both the Sunday Times and Observer had higher readership levels among those who had heard about the production attended through press reviews and articles than among those who had heard about it through press listings and advertising. In 1985/86, the percentage of those who had heard about the production attended through press listings and advertising

who were Sunday Times readers fell sharply.

The following table shows the percentage of U.K. resident readers of the five most read Sunday newspapers who had heard about the production attended through press listings and advertising and through press reviews and articles.

	<u>Sunday papers read, 1981/82</u>				
	<u>Times</u>	<u>Observer</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Express</u>
Weighted base	3472	2373	940	250	1085
<u>How heard about</u>					
<u>production attended</u>	%	%	%	%	%
Listings/advertising	24	22	23	14	18
Review/article	43	42	38	34	36

	<u>Sunday papers read, 1985/86</u>				
	<u>Times</u>	<u>Observer</u>	<u>Telegraph</u>	<u>Mail</u>	<u>Express</u>
Weighted base	1031	753	214	377	369
<u>How heard about</u>					
<u>production attended</u>	%	%	%	%	%
Listings/advertising	29	36	34	26	32
Review/article	44	42	37	30	22

Fig 8-45 Percentage of U.K. resident readers of most read Sunday papers hearing about production attended through the press

More than one answer possible

Base=all U.K. resident Sunday Times, Observer, Sunday Telegraph, Mail on Sunday and Sunday Express readers.

Sunday Times readers were the most likely to have heard about the production attended through press listings or advertising in 1981/82, but in 1985/86, readers of the Observer were the most likely to have learned about the production attended through press listings and advertising, and Sunday Times readers became the second least likely group of readers to have done so. Sunday Times readers were consistently the most likely to have heard about the production attended through reviews or articles.

The following table shows readership levels of the four most often read entertainment periodicals among those U.K. residents who heard about the production through press listings and advertising and through press reviews and articles. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>How heard about production attended</u>	
	<u>Press listings/ advertising</u>	<u>Press review/ article</u>
Weighted base	2019 (1077)	3034 (1138)
<u>Entertainment</u>		
<u>periodicals read</u>	%	%
<u>Time Out</u>	17 (10)	16 (13)
<u>City Limits</u>	6 (3)	5 (4)
<u>Event</u> (81/82 only)	2 (n/a)	2 (n/a)
<u>What's On</u> (81/82 only)	6 (n/a)	6 (n/a)

Fig 8 46 Distribution of those U.K. residents hearing about production attended from the press, by readership of most read entertainment periodicals

More than one answer possible.

Base=all those U.K. residents hearing about production attended through the press.

There were only small percentage differences in readership levels for each of the major entertainment periodicals between those who had heard about the production attended through press listings and advertising and those who had heard through press reviews and articles. Both groups were more likely to read Time Out than any of the other entertainment magazines. Those mentioning press listings and advertising in 1981/82 were slightly more likely to read Time Out and City Limits than were those who saw reviews or articles, but the reverse was true in 1985/86.

The following table shows the percentage of U.K. resident readers of the most read entertainment periodicals who had heard about the production attended through press listings and advertising and through press reviews and articles.

Entertainment periodicals read

	<u>Time</u>	<u>Time</u>	<u>City</u>	<u>City</u>	<u>What's</u>	
	<u>Out</u>	<u>Out</u>	<u>Limits</u>	<u>Limits</u>	<u>Event</u>	<u>On</u>
	<u>81/82</u>	<u>85/86</u>	<u>81/82</u>	<u>85/86</u>	<u>81/82</u>	<u>81/82</u>
Weighted base	1170	328	439	92	181	502
<u>How heard about</u>						
<u>production attended</u> %	%	%	%	%	%	%
Listings/advert.	27	34	26	35	28	23
Review/article	41	45	34	50	34	36

Fig 8-47 Percentage of U.K. resident readers of most read entertainment periodicals hearing about production attended through the press

More than one answer possible

Base=all U.K. resident Time Out, City Limits, Event and What's On readers

In 1981/82, Event readers were more likely than readers of any of the other entertainment periodicals examined in detail to have heard about the production attended through press listings and advertising, while Time Out readers were the most likely to have heard about the production attended through press reviews and articles.

Time Out and City Limits readers were almost equally likely to mention press listings and advertising as a source of information about the production attended in both survey periods. Time Out readers were more likely than City Limits readers to have heard about the production through press reviews or articles in 1981/82, while the opposite was true in 1985/86.

The following table shows radio listening patterns among those U.K. residents who heard about the production on the radio. The figures relate to the 1981/82 surveys only, as radio listening questions were not included in the 1985/86 surveys.

Heard about production
attended on the radio

Weighted base	537
<u>Radio stations listened to</u>	%
<u>Radio 1</u>	25
<u>Radio 2</u>	29
<u>Radio 3</u>	14
<u>Radio 4</u>	39
<u>Capital Radio</u>	28
<u>Radio London</u>	5
<u>LBC</u>	12

Fig 8-48 Distribution of those U.K. residents hearing about the production attended on the radio, by radio stations listened to, 1981/82

More than one answer possible

Base=all those U.K. residents hearing about the production attended on the radio

Compared with those who had not heard about the production attended on the radio, those who had heard about it on the radio were more likely to listen to Radios 1 and 2, and to Capital Radio and to Radio London, and less likely to listen to Radios 3 and 4.

There was very little difference in the percentage of listeners to each of the listed radio stations who had heard about the production on the radio. Radio 2 listeners were the most likely to have heard about the production on

the radio, and Radio 3 listeners the least likely, but the percentages were only 8% and 5% respectively.

Notes to Chapter 8

- (1) The London Theatre Guide is a free leaflet published fortnightly by SWET, and distributed to theatres, libraries, tourist information centres and hotels. It is also possible to become a subscriber to the Guide, and have it sent by post. The Guide gives details of productions playing in West End theatres, including box office and pricing information, and the location of the theatres. A sample copy of the Guide can be found in Appendix 10.

- (2) Those mentioning a theatre programme advertisement as a source of information in the 1981/82 surveys are not included in the press advertising category in the detailed analysis of those mentioning the major types of publicity. This applies to all tables in this chapter which examine in detail those respondents mentioning press advertising as a source of information.

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

- (4) See note (4), Chapter 2, for details of method used to calculate mean frequency of London theatre-going.

- (5) Readership figures were obtained from the JIC National Readership Survey, summarised annually in Social Trends, published by HMSO. Readership figures are generally 2 to 3 times higher than actual circulation, to allow for multiple readership of individual copies. Figures for the 1982 and 1985 calendar years were used in calculating figures in this column, for all the relevant tables in this chapter.
- (6) Figures for Sunday newspaper readership were obtained from the same source as those for daily newspaper readership. See note (5) above.
- (7) Since the 1981/82 surveys, Where to Go has been incorporated into the What's On title, and at the time of writing is called What's On and Where to go in London.
- (8) Event has ceased publication since the 1981/82 survey period.
- (9) The figures used in calculating the percentage of the readership of each publication who attended the West End Theatre were based on actual circulation figures from the Audit Bureau of Circulation, published annually in the Advertiser's Annual, published by Thomas Skinner Directories. In each case, circulation figures were multiplied by a factor of 2.5 to allow for

multiple readership of each copy. The JIC National Readership survey, from which the daily and Sunday newspaper readership figures were taken, estimates the multiplication factor for most of the daily and Sunday newspapers at between 2.0 and 3.0, so that 2.5 was selected as a suitable median figure for a multiplication factor for periodical readership. Circulation figures for the nearest calendar year to the survey periods were used in each case.

- (10) Listening figures for the BBC radio stations were supplied by the BBC Radio Information Department. They were available only in the form of an estimate of the percentage of the U.K. population aged 4 and over who were likely to listen to these stations at some time during a given week. These figures were, therefore, recalculated, using the census data, and assuming that all age groups would be equally likely to listen to the radio, to provide an estimate of the likely percentage of the population aged 15 or over who listened to each station (this being the nearest category to correspond to the 'surveys' coverage of the audience aged 16 and over). This is likely to have led to a degree of over-estimation in the figures for BBC Radio 1, for example, since a high percentage of listeners to this station are in fact likely to have been aged under 15, and a probable degree of conservatism in figures for Radios 3 and 4, which are likely to have few listeners aged under 15. In the

interests of consistency however, the same percentage of listeners to Radios 1 to 4 were assumed to be aged 15 and over as was the case for the U.K. population. Capital Radio and LBC listening figures were obtained from the Advertisers Annual, published by Thomas Skinner Directories. Listening figures quoted in this publication were already based on the number of adults aged 15 or over living within the Greater London area who were likely to have listened to these stations at all in a given week, so no re-calculations were necessary in their case. In all cases, listening figures used in the calculations were based on an average week for the calendar year 1982.

- (11) The BBC Radio Information Department estimates that just under 1% of the U.K. population aged 4 and over listened to Radio 3 during an average week in 1982.

CHAPTER 9 ATTRACTIONS OF AND DETERRENTS TO WEST END
THEATRE-GOING

(1) Attractions of West End productions

(a) Reasons for choosing production attended

Respondents were asked, in both survey periods, what had attracted them to the production they were attending. Only one answer was requested to this question, with the intention that respondents would select the main or most important attraction. *Nine options were listed on the questionnaire in 1981/82.* These were; the playwright, the actors, the play itself, the music, the reviews, theatre awards, personal recommendation, someone else's decision, and no special reason. The question was left open-ended. Most replies written in under the "other" category were re-classifiable as one of the listed options, and it was desirable to do so during analysis, in order that broad comparisons could be made between the different categories of production. For example; choreographer and librettist were not listed as options in the questionnaire, but where they were written in under "other", these replies were reclassified under the playwright category since the roles of the choreographer and librettist in opera, dance and musical productions corresponded roughly to that of the playwright in the case of a play. Another example is that of individual singers and dancers, and companies. Where written in as an attraction under the "other" category, these were reclassified under the actors category. Composers, where written in, were re-classified under the

music category, and the dance work or opera under the play itself category. In 1985/86, in the light of the experience of analysing the results of this question from the 1981/82 surveys some of the listed options on the questionnaire were given a more comprehensive wording than in 1981/82, to avoid the necessity of reclassifying a large number of attractions written in as an "other" option. The options listed in 1985/86 were; playwright, actors or performers, theatre awards, recommended by someone else, play or production itself, music or composer, good reviews and someone else decided. The no special reason option was not included in 1985/86, as it was felt that in 1981/82, this had offered respondents the opportunity to answer the question without giving due consideration to what had actually attracted them. The question remained open-ended, but there were far fewer replies written in under the "other " category than there were in 1981/82. As in 1981/82, the majority of those attractions which were written in under "other" could be re-classified as one of the listed options.

The following tables shows the results of the question on attractions for both survey periods. The more comprehensive wordings from the 1985/86 version of the questionnaire are used in this, and in all remaining tables in this chapter.

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	11638	6490
<u>Attraction of production</u>		
<u>attended</u>	%	%
Playwright	11	5
Actors or performers	18	15
Theatre awards	1	4
Recommended by someone	15	36
Play or production itself	11	11
Music or composer	12	12
Good reviews	9	6
Someone else decided	11	9
No special reason (81/82 only)	6	n/a
Other	6	2

Fig 9-1 Distribution of the West End audience,
by attraction of production attended

Base = all respondents

The overall importance of attractions such as the actors and the playwright will have depended to some extent on which productions were selected for survey. However, no attempt was made to either select or avoid productions when compiling the survey schedule on the grounds of there being, for example, a star name in the cast. There was sufficient similarity in the overall results relating to specific attractions of the production when compared between the two survey periods to indicate that the effect of, for example, a star name in a particular production, was minimised when the results were weighted in line with

actual attendances for each category of production. Since the likelihood of a star name or well-known playwright being a feature of any production selected for survey would depend on how prominent such factors were in the West End as a whole during each survey period, it is believed that the figures in the preceding table provide a reasonably accurate reflection of the relative importance of the various attractions of West End productions. It is likely that the distribution of attractions found in these surveys, and possibly the kind of audiences attracted to the West End, would change, however, if the composition of the West End repertoire changed substantially.

In 1981/82, the actors or performers were the most important attraction, followed by someone's recommendation. In 1985/86, this position was reversed, with recommendation becoming far more important as an attraction than any other factor. This was probably linked to the increased importance of word of mouth as a source of information about the production attended in 1985/86. It may also have reflected a less wide-spread knowledge of particular British actors' and performers' names in 1985/86, given the large increase in the percentage of the audience who were from overseas in the second survey period.

The music or composer was the third most important attraction in both survey periods, and was mentioned by the same percentage of respondents in both survey periods.

In 1981/82, the playwright, the play or production itself, and someone else's decision tied for fourth most important attraction. Of these three attractions, only the play itself did not decrease in importance as an attraction in 1985/86, and retained its position as fourth most important attraction.

Someone else's decision was joint fourth in importance as an attraction in 1981/82, and fifth in importance in 1985/86.

Good reviews came seventh in importance in 1981/82, sixth in 1985/86. They were apparently far less influential in attracting audiences than a good personal recommendation was. It can not be determined from these surveys, however, how far bad reviews might have deterred people from seeing a particular production.

Although fairly low on the list of attractions overall, the percentage of the audience mentioning theatre awards was, of course, much higher at those shows which had won major awards than it was when averaged out over the audience as a whole. The percentage of the overall audience mentioning awards would depend to some extent on how many award-winners were included in the survey sample. In 1981/82, of the 38 performances surveyed, 9 were of productions which had won a major theatre award. The highest percentage of any audience mentioning the awards as the

attraction of that production was at a comedy which had won a best comedy award, Steaming, by Nell Dunn. 12% of the audience for this production said they were attracted by the award, even though it had been made almost a year prior to the survey. In 1985/86, of the 20 performances surveyed, 10 were of productions which had won a major theatre award, over twice the percentage of the total productions surveyed in 1981/82 which were award winners. The increased importance of theatre awards as an attraction in 1985/86 was therefore probably in part a function of the productions surveyed rather than being wholly a real increase in the attraction of awards. The highest percentage of any audience mentioning the awards as the attraction of that production in 1985/86 was at a comedy which had won a best comedy award, Stepping Out by Richard Harris. 13% of the audience at one of the three surveys of this production said they were attracted by the award.

6% of respondents in 1981/82 said there was no special reason why they had selected the production they were attending.

A number of attractions other than those already mentioned were written in by respondents under the "other" category. None were mentioned by more than 1% of the overall West End audience. These were: tickets being available at short notice, including availability at half-price tickets from the Leicester Square booth and Standby tickets; the suitability of the production for children; being given

free tickets; the reputation of a repertory company; having seen the production before, especially if it was a revival; the director or designer's name; and the theatre building itself.

The following tables show the distribution of attractions of the production attended for each of the categories of production which were analysed for demographic and theatre-going variations in audience profile in Chapter 2.

Category of production, 1982

	<u>Opera</u>	<u>Dance</u>	<u>Drama</u>	<u>Modern Classical Play</u>	<u>Modern Musical</u>
Unweighted base	1630	1360	392	902	832
<u>Attraction of production attended</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Playwright	2	1	13	36	-
Actors or performers	8	23	20	15	3
Theatre awards	n/a	n/a	*	n/a	*
Recommended	7	18	14	5	18
Play or production	11	10	12	15	11
Music or composer	48	11	-	-	42
Good reviews	3	3	6	6	11
Someone else decided	11	18	14	15	9
No special reason	7	10	9	3	4
Other	3	6	12	5	2

Fig 9-2 Distribution of each category of production audience, by attraction of production attended, 1982

*=less than 0.5%

n/a = None of the productions surveyed in this category had won any awards at the time of the surveys

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>	
Unweighted base	817	473	420	154	311
<u>Attraction of</u>					
<u>production attended</u>	%	%	%	%	%
Playwright	10	1	34	1	*
Actors or performers	20	4	16	22	22
Theatre awards	*	4	n/a	n/a	n/a
Recommended	13	28	8	13	12
Play or production	11	13	20	28	14
Music or composer	11	-	-	-	14
Good reviews	12	18	4	2	12
Someone else decided	15	17	9	12	13
No special reason	7	12	7	.7	7
Other	1	3	2	15	5

Fig 9-2 Distribution of each category of production audience, by attraction of production attended, 1982

*=less than 0.5%

n/a = None of the productions surveyed in this category had won any awards at the time of the surveys

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>
Unweighted base	850	679	260	402	201
<u>Attraction of</u>					
<u>production attended</u>	%	%	%	%	%
Playwright	4	7	5	24	3
Actors or performers	6	48	40	26	5
Theatre awards	n/a	n/a	5	n/a	2
Recommended	35	19	37	13	37
Play or production	22	12	2	21	11
Music or composer	16	3	-	-	32
Good reviews	6	6	4	4	4
Someone else decided	7	5	5	12	6
Other	4	*	2	*	-

Fig 9-3 Distribution of each category of production audience, by attraction of production attended, 1985/86

*=less than 0.5%

n/a = None of the productions surveyed in this category had won any awards at the time of the surveys

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>	
Unweighted base	649	254	162	131	1101
<u>Attraction of</u>					
<u>production attended</u>	%	%	%	%	%
Playwright	1	3	10	9	3
Actors or performers	13	15	36	29	8
Theatre awards	5	8	n/a	n/a	6
Recommended	46	41	20	35	47
Play or production	8	9	19	11	8
Music or composer	5	n/a	n/a	n/a	7
Good reviews	10	8	5	2	9
Someone else decided	9	12	9	15	10
Other	2	4	2	.-	2

Fig 9-3 Distribution of each category of production audience, by attraction of production attended, 1985/86

*=less than 0.5%

n/a = None of the productions surveyed in this category had won any awards at the time of the surveys

Base=all respondents surveyed for category of production testing.

The opera audience in 1981/82 were much more likely to have been attracted to the production attended because of the music or composer than for any other reason. In 1985/86,

however, recommendation was by far the most important attraction for the opera audience, followed by the opera or production itself, with the music or composer featuring only third among the attractions. The composers whose works were chosen for the opera surveys were Massenet and Puccini in 1981/82, and Offenbach in 1985//86. Singers were fairly low down the list of attractions of operas in both survey periods, although certain singers apparently had a loyal following, and a number of respondents wrote on their questionnaires that they would always see everything (named singer) was appearing in.⁽¹⁾

The dance audience in both survey periods were more likely to be attracted by the dancers or company performing than for any other reason. Dance audiences were consistently the most likely category of production audience to be attracted by the performers. In 1981/82, dance audiences were more likely than any other to have had someone else chose the production attended for them. Dance was probably a category of production to which young people were often taken by parents or teachers.⁽²⁾ Recommendation was also an important factor in attracting`dance audiences.

The modern drama audience were more likely to be attracted by the actors appearing in the production than for any other reason. All of the three modern drama productions surveyed had well-known actors in their casts; Glenda Jackson and Alec McCowen in 1982, and Anthony Sher in 1985/86. The play itself, and the playwright, were less

important attractions of modern drama productions than were the actors or recommendation of the production. These findings suggest that modern drama is most likely to succeed in the West End if a well-known actor is cast in a leading role.

The classical play audience were the most likely category of production audience to be attracted by the playwright's name, in both survey periods. This was not surprising, since the productions surveyed were selected specifically because of their status as classical works. The two playwrights covered by the three productions surveyed were - Shakespeare in 1982 and Webster in 1985. In 1982, Shakespeare's name was a more important attraction than the reputation of the Royal Shakespeare Company, who were performing both of the Shakespeare productions surveyed, or of individual actors in that company. In 1985, however, the actors in the Ian McKellen/Edward Petherbridge company at the National Theatre, whose production of Webster's The Duchess of Malfi was surveyed as the classical play production in 1985, were a more important attraction than the playwright or the play itself, although all three factors remained important attractions. The Shakespeare plays being performed in 1982, Richard II, and All's well that ends well, were themselves much less of an attraction than Shakespeare's name, whereas in 1985 the attraction of Webster's name and of the Duchess of Malfi were almost equally important.

The most important attraction of modern musicals in 1982 was the music or composer; both surveys were of Andrew Lloyd Webber musicals. In 1985/86, personal recommendation was the most important attraction for the modern musical audience, although the music and the composers, Lennon and McCartney, were not far behind recommendation in importance. Only the music or composer and personal recommendation were very important attractions of the modern musical in both survey periods.

The traditional musical audience were much less likely than the modern musical audience to be attracted by the music or composer. This is in spite of the fact that the three traditional musicals surveyed were all either revivals or transfers of Broadway productions, and so the music might be supposed to be well-known. The singers/performers appearing in traditional musicals were the most important attraction in 1981/82; well-known names in the casts of the two musicals surveyed in the traditional musical category in 1981/82 were Tom Conti, Pamela Stephenson and Tim Curry. In 1985/86, however, recommendation was by far the most important attraction of the production attended for the traditional musical audience.

The comedy audience were consistently more likely to be attracted by recommendation than by any other factors. They were the most likely category of production audience to mention recommendation in 1981/82. In both survey periods, comedy audiences were more likely than average to be

attracted by recommendation and by good reviews.

The thriller audience in 1981/82 were most likely to have been attracted to the production attended by the playwright's name. In the case of one production, The Mousetrap, this was Agatha Christie, and in the other, Cards on the Table, the production was an adaptation of an Agatha Christie novel, which presumably led some respondents to think of the production as being an Agatha Christie play. In 1985/86, the actors were much more important than the playwright as an attraction; Richard Todd appeared in the thriller surveyed, which was written by Richard Harris, who is a much less widely known writer than Agatha Christie.

In 1981/82, the main attraction of the children's/family shows surveyed was the play or production itself. The main attraction of the production surveyed in 1985/86 was personal recommendation. The actors or performers, including puppet characters, were also an important attraction of children's or family shows. In 1981/82, the main attraction of the production for 12% of those surveyed was the fact that it was suitable for a family holiday outing.

The actors were the main attraction of the revue surveyed in 1981/82. Roy Hudd and Christopher Timothy, both names well-known on British television, appeared in this

production.

For the two Broadway transfer musicals surveyed in 1985/86, recommendation was a far more important attraction than any other factor. This was the most likely category of production audience in 1985/86 to say that recommendation was the attraction of the production attended. The distribution of their reasons for selecting the production attended was similar to that of the traditional musical audience in 1985/86, with the music or composer being low on the list of attractions.

The following table shows the distribution of attractions 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 boroughs</u>		<u>Rest U.K.</u>	
Weighted base	3132 (2379)		4640 (2391)		3842 (1673)	
<u>Attraction of production attended</u>	%		%		%	
Playwright	10	(4)	12	(6)	10	(5)
Actors or performers	21	(11)	17	(16)	18	(20)
Theatre awards	1	(4)	1	(4)	2	(3)
Recommended	15	(34)	16	(40)	15	(33)
Play or production	11	(12)	11	(12)	11	(10)
Music or composer	9	(15)	12	(9)	14	(11)
Good reviews	9	(6)	9	(5)	10	(7)
Someone else decided	10	(9)	13	(7)	14	(10)
No special reason (81/82 only)	6	(n/a)	6	(n/a)	6	(n/a)
Other	9	(5)	3	(2)	4	(1)

Fig 9-4 Distribution of each area of residence group, by attraction of production attended

Base - all respondents

In 1981/82, each of the three area of residence groups were more likely to be attracted by the actors or performers than by any other factor. In 1985/86, each group was much more likely to be attracted by recommendation than by any other factor.

London boroughs residents were the most likely area of

residence group to mention the playwright as an attraction. Overseas visitors were the most likely area of residence group to be attracted by the actors in 1981/82, but in 1985/86 it was U.K. residents from outside London who were the most likely group to be attracted by the actors. Recommendation of a production was more likely to be an attraction for London boroughs residents than for the other area of residence groups. There was little difference in the percentage of each area of residence group saying that the play or production itself was the attraction. U.K. residents from outside London were the most likely area of residence group to be attracted to a production because of the music or composer in 1981/82, while overseas visitors were the most likely to say this was the case in 1985/86. Good reviews were most likely to be an attraction for the rest U.K. group, and they were also the most likely area of residence group to have had someone else select the production they were attending.

The following table shows the area of residence distribution of those attracted to the production attended for each of the six most important reasons, excluding someone else's decision.

Attracted by, 1981/82

	<u>Play-</u> <u>wright</u>	<u>Actors</u>	<u>Recomm-</u> <u>endation</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
Weighted base	1308	2096	1792	1291	1409	1034
<u>Area of residence</u>	%	%	%	%	%	%
Overseas	25	32	29	26	21	23
London boroughs	46	37	41	42	41	40
Rest U.K.	29	31	30	32	38	37

Attracted by, 1985/86

	<u>Play-</u> <u>wright</u>	<u>Actors</u>	<u>Recomm-</u> <u>endation</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
Weighted base	311	985	2333	719	788	409
<u>Area of residence</u>	%	%	%	%	%	%
Overseas	26	25	35	38	45	35
London boroughs	47	38	41	38	28	33
Rest U.K.	27	37	24	24	24	32

Fig 9-5 Distribution of those attracted to production
attended by selected factors, by area of residence

Base=those attracted by the playwright, actors,
recommendation, the play, the music or by reviews

In both survey periods, London boroughs residents accounted for the largest area of residence group of those attracted to the production attended because of the playwright, the actors, and because of a recommendation.

In 1981/82, London boroughs residents formed the largest area of residence group of those attracted by the play or production itself, but in 1985/86, overseas visitors were equally important among this group.

In 1981/82, London boroughs residents were the most important area of residence group among those who were attracted to the production attended because of the music, but in 1985/86 overseas visitors accounted for almost half of all those selecting a production because of the music, and were much more important than either group of U.K. residents among those selecting the production attended for this reason.

The following table shows the distribution of attractions 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	6740 (3122)		4853 (3263)	
<u>Attraction of</u>				
<u>production attended</u>	%		%	
Playwright	10	(4)	12	(6)
Actors or performers	18	(16)	17	(15)
Theatre awards	1	(3)	2	(4)
Recommended	15	(38)	15	(35)
Play or production	11	(11)	11	(12)
Music or composer	12	(13)	12	(12)
Good reviews	8	(6)	10	(7)
Someone else decided	12	(9)	10	(9)
No special reason (81/82 only)	6	(n/a)	6	(n/a)
Other	7	(2)	4	(2)

Fig 9-6 Distribution of each sex, by attraction of production attended

Base = all respondents

The percentage differences between the two sexes in the importance of the various attractions were very small in most cases. Women were slightly more likely than men to be attracted to the production attended by the actors. Men were slightly more likely than women to be attracted to the production attended by the playwright, by theatre awards, or by good reviews.

The following table shows the sex distribution of those

attracted to the production attended for each of the six most important reasons, excluding someone else's decision.

Attracted by, 1981/82

	<u>Play-</u>	<u>Actors</u>	<u>Recomm-</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
	<u>wright</u>		<u>endation</u>			
Weighted base	1300	2091	1788	1297	1402	1031
<u>Sex</u>	%	%	%	%	%	%
Female	54	59	58	57	59	52
Male	46	41	42	43	41	48

Attracted by, 1985/86

	<u>Play-</u>	<u>Actors</u>	<u>Recomm-</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
	<u>wright</u>		<u>endation</u>			
Weighted base	312	983	2361	712	787	408
<u>Sex</u>	%	%	%	%	%	%
Female	40	50	51	49	52	47
Male	60	50	49	51	48	53

Fig 9-7 Distribution of those attracted to production attended by selected factors, by sex

Base=those attracted by the playwright, actors, recommendation, the play, the music or by reviews

Women consistently formed the majority of those attracted by recommendation or by the music or composer. In 1985/86, men accounted for the majority of those attracted by the play itself, the playwright and by reviews.

The following tables show the distribution of attractions for each age group.

	<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	921	2099	3143	2340	1750	901	460
<u>Attraction of</u>							
<u>production attended</u>	%	%	%	%	%	%	%
Playwright	9	14	12	9	9	10	8
Actors or performers	11	14	17	19	20	21	20
Theatre awards	1	1	1	1	1	1	2
Recommended	14	16	15	15	13	12	14
Play or production	10	11	12	11	10	12	13
Music or composer	8	8	11	15	15	15	14
Good reviews	8	8	8	9	11	11	8
Someone else decided	24	17	13	9	9	8	10
No special reason							
(81/82 only)	9	7	7	5	6	5	5
Other	9	4	6	7	8	8	9

Fig 9-8 (a) Distribution of each age group, by attraction of production attended, 1981/82
 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	767	1408	1542	1209	768	422	259
<u>Attraction of</u>							
<u>production attended</u>	%	%	%	%	%	%	%
Playwright	4	3	6	4	6	8	6
Actors or performers	9	12	15	16	20	21	17
Theatre awards	2	4	4	4	4	3	5
Recommended	40	41	34	39	33	36	33
Play or production	9	13	12	11	11	11	9
Music or composer	16	17	14	8	9	6	6
Good reviews	4	4	6	8	7	7	4
Someone else decided	16	7	8	7	7	8	18
Other	2	2	2	2	4	2	3

Fig 9-8 (b) Distribution of each age group, by
attraction of production attended, 1985/86

Base = all respondents

In 1981/82, all the 25 and over age groups were more likely to have been attracted to the production attended because of the actors than for any other reason. The under 25's were more likely to be attending the production because of someone else's decision than for any other reason. In 1985/86, however, all age groups were more likely to have been attracted to the production attended because it had been recommended to them than for any other reason.

The 19-24's were the most likely age group to be attracted

by the playwright's name in 1981/82, suggesting that an educational connection was important, perhaps with plays on a drama curriculum. In 1985/86, however, it was the 55-64's who were the most likely age group to be attracted by the playwright's name, although there were only small percentage differences between the age groups.

The 55-64's were consistently the most likely age group to be attracted by the actors. The 45 and overs were generally more likely to be attracted by the actors than the under 45's were.

The 65 and overs were the most likely age group to be attracted by a production having received theatre awards.

Recommendation was more important as an attraction to the 19-24's than to any other age group.

The play or production itself was a more important attraction to the 65 and overs in 1981/82 and to the 19-24's in 1985/86, than to the other age groups.

In 1981/82, it was the 35-64's who were the most likely age groups to be attracted to a production because of the music. However, 1985/86 saw a large increase in the percentage of the audiences for both modern musicals who were aged under 25, and in 1985/86, it was the under 25's

who were the most likely age groups to be attracted to a production because of the music. The importance of the music as an attraction increased among the under 35's in 1985/86, and decreased among the over 35's.

The 35-64 age groups were the most likely to be attracted by good reviews.

The 16-18's and 65 and overs were the most likely age groups to be at the theatre because of someone else's decision, in 1981/82 and 1985/86, respectively.

The following table shows the age distribution of those attracted to the production attended for each of the six most important reasons, excluding someone else's decision.

<u>Attracted by, 1981/82</u>						
	<u>Play-</u>	<u>Actors</u>	<u>Recomm-</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
	<u>wright</u>	<u>endation</u>				
Weighted base	1307	2090	1782	1292	1391	1030
<u>Age group</u>	%	%	%	%	%	%
16 - 18	6	5	7	6	5	6
19 - 24	25	15	22	18	12	16
25 - 34	29	26	27	28	25	27
35 - 44	17	22	21	20	24	20
45 - 54	12	17	12	13	18	18
55 - 64	8	11	7	10	11	10
65 and over	3	5	4	5	5	3
Mean age ⁽³⁾						
(actual)	35	38	35	37	39	38

Fig 9-9 (a) Distribution of those attracted to production attended by selected factors, by age group, 1981/82

Base=those attracted by the playwright, actors, recommendation, the play, the music or by reviews

<u>Attracted by, 1985/86</u>						
	<u>Play-</u>	<u>Actors</u>	<u>Recomm-</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
	<u>wright</u>	<u>endation</u>				
Weighted base	310	978	2360	710	778	405
<u>Age group</u>	%	%	%	%	%	%
16 - 18	10	7	13	9	15	9
19 - 24	16	18	24	26	31	15
25 - 34	28	24	22	26	28	26
35 - 44	16	20	20	18	13	25
45 - 54	15	16	11	12	9	15
55 - 64	11	9	6	7	3	8
65 or over	4	5	4	3	2	3
Mean age (actual)	37	37	34	34	30	36

Fig 9-9 (b) Distribution of those attracted to production attended by selected factors, by age group, 1985/86

Base=those attracted by the playwright, actors, recommendation, the play, the music or by reviews

All of the groups examined in detail, except those attracted by the playwright, had a lower mean age in 1985/86 than in 1981/82. In 1981/82, those attracted by the playwright and by recommendation had the youngest mean ages. In 1985/86 the mean age of those attracted by the music changed from being the oldest in 1981/82 to become the youngest.

Those attracted by someone else's view expressed as a recommendation consistently had a younger mean age than those attracted by someone else's view as found in good reviews.

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

Frequency group (London theatre-going)

New

	<u>Visitors</u>	<u>Occasionals</u>	<u>Frequent</u>	<u>Regulars</u>
Weighted base	2540(1992)	2780(1721)	4543(2130)	1748(571)
<u>Attraction of production attended</u>	%	%	%	%
Playwright	9 (5)	8 (3)	12 (5)	15 (8)
Actors or performers	19 (11)	18 (11)	18 (19)	20 (29)
Theatre awards	2 (2)	3 (6)	1 (4)	* (2)
Recommended	18 (42)	16 (33)	14 (37)	9 (21)
Play or production	9 (11)	10 (12)	12 (10)	13 (16)
Music or composer	12 (12)	12 (19)	11 (7)	15 (9)
Good reviews	9 (5)	11 (8)	9 (6)	7 (4)
Someone else decided	12 (11)	11 (9)	10 (8)	9 (7)
No special reason (81/82 only)	7 (n/a)	6 (n/a)	6 (n/a)	6 (n/a)
Other	4 (2)	6 (*)	7 (4)	6 (3)

Fig 9-10 Distribution of each frequency group, by attraction of production attended

* = less than 0.5%

Base = all respondents

All frequency groups were more likely to have been attracted by the actors than by any other factor in 1981/82, and more likely to have been attracted by

recommendation than by any other factor in 1985/86.

The actors, the playwright, and the play or production itself were consistently more important attractions for regular theatre-goers than for the other frequency groups. Recommendation was consistently a more important attraction to the new visitors group than to any other frequency group. Occasional theatre-goers were consistently the most likely group to be attracted by theatre awards and by good reviews. Regular theatre-goers were the most likely group to be attracted by the music in 1981/82, occasional theatre-goers in 1985/86. New visitors were consistently the most likely group to have gone to the theatre as a result of someone else's decision.

The following table shows the distribution of London theatre-going frequency for those attracted to the production attended for each of the six most important reasons, excluding someone else's decision.

Attracted by, 1981/82

	<u>Play-</u> <u>wright</u>	<u>Actors</u>	<u>Recomm-</u> <u>endation</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
Weighted base	1306	2090	1773	1281	1390	1028
<u>Visits in</u>						
<u>previous 12 months</u>	%	%	%	%	%	%
This is first visit	18	23	27	18	23	20
1 other	9	11	12	8	12	16
2 others	9	12	14	14	10	13
3 - 6 others	26	26	27	28	25	27
7 - 11 others	17	12	11	14	12	12
12 or more others	21	16	9	18	19	13
Mean frequency (4)						
(actual)	3	3	2	3	3	3

Fig 9-11 (a) Distribution of those attracted to production attended by selected factors, by frequency of London theatre-going, 1981/82

Base=those attracted by the playwright, actors, recommendation, the play, the music or by reviews

	<u>Attracted by, 1985/86</u>					
	<u>Play-</u>	<u>Actors</u>	<u>Recomm-</u>	<u>Play</u>	<u>Music</u>	<u>Reviews</u>
	<u>wright</u>	<u>endation</u>				
Weighted base	309	973	2360	698	777	401
<u>Visits in</u>						
<u>previous 12 months</u>	%	%	%	%	%	%
This is first visit	34	22	35	29	32	27
1 other	8	10	11	17	29	19
2 others	9	9	14	12	14	14
3 - 6 others	22	27	24	19	15	26
7 - 11 others	11	14	10	10	4	8
12 or more others	16	18	6	14	7	6
Mean frequency						
(actual)	2	3	2	2	2	2

Fig 9-11 (b) Distribution of those attracted to' production attended by selected factors, by frequency of London theatre-going, 1985/86

Base=those attracted by the playwright, actors, recommendation, the play, the music or by reviews

Those attracted by the playwright contained the highest percentage of those who had made 12 or more other visits in the last 12 months in 1981/82. Those attracted by the actors contained the highest percentage of these regular theatre-goers in 1985/86. Those attracted by recommendation were consistently the group with the highest percentage who were making their first visit in 12 months to a London theatre.

(b) Relationship between means of hearing about the production attended and attraction of the production

This section examines the relationship between the the means of hearing about the production attended and the attraction of the production where there are most likely to be direct links between the two, that is, between those who had heard about the production attended through word of mouth and those who had been attracted to the production by a recommendation, and between those who had learned of the production through press reviews and articles and those who were attracted by good reviews.

The following table shows the ways in which those who were attracted by a recommendation or by good reviews had heard about the production attended. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Attracted by</u>			
	<u>Recommendation</u>		<u>Reviews</u>	
Weighted base	1761	(2340)	1025	(400)
<u>How heard about production</u>				
<u>attended</u>	%		%	
Poster	6	(14)	6	(7)
Display outside theatre	3	(8)	4	(10)
Radio	3	(3)	8	(2)
Television	4	(3)	13	(6)
Told by someone	75	(67)	25	(50)
Leaflet	7	(6)	7	(8)
<u>Classified listings in the</u>				
press	6	(7)	19	(17)
Other press advertising	1	(11)	6	(21)
Review or article in the press	8	(7)	68	(50)
The <u>London Theatre Guide</u>	11	(11)	18	(20)
<u>West End Theatre magazine</u>				
(85/86 only)	n/a	(1)	n/a	(1)
Other	3	(4)	1	(3)

Fig 9-12 Distribution of those attracted to production

attended by recommendation or by reviews,

by means of hearing about the production

More than one answer possible

Base = those attracted by recommendation or reviews

Of those who were attracted to the production attended because it had been recommended to them, 75% in 1981/82

and 67% in 1985/86 had actually learned of the production by being told about it. The remainder would have heard about the production by other means, and subsequently sought, or been given, advice on whether it was likely to appeal to them from friends, ticket agents, tourist offices etc., and had let that recommendation be the deciding factor in choosing the production.

68% of those who were attracted by good reviews in 1981/82 had heard about the production through a review or article in the press, 50% in 1985/86. They were very much more likely to have seen reviews and articles in the press about the production attended than were those who had chosen the production because of a good recommendation. For those who chose the production attended mainly because it had had good reviews, but who did not hear about it through press reviews and articles, it is probable that by good reviews they meant quotations from reviews on displays outside the theatre, in leaflets and in advertisements. That the practice among audiences of relying on reviews quoted in publicity in deciding which production to attend was quite common, was demonstrated by the *fact that just under 1% of those specifying deterrents to London theatre-going in 1985/86 said that the inaccurate summarising or extracting of review quotations in some theatres' publicity put them off going to London theatres. It is also probable that some of those attracted by reviews, but not learning about the production attended through press reviews and articles, had, after hearing about the production by some other

means, consulted an entertainments listing magazine for further details, and had seen good reviews of the production in that magazine; such magazines often re-print their original reviews of productions currently playing even when they have been running from some time. Radio and television reviews of productions are also likely to have played a part in informing those who said they went to a production because of its good reviews. For example, 13% of those attracted by good reviews in 1981/82 had heard about the production attended on television.

The following table shows the distribution of the six most important attractions of the production attended (excluding someone else's decision) among those who had heard about the production attended through word of mouth and through press reviews or articles. 1981/82 figures are given first, 1985/86 follow in brackets.

		<u>How heard about production attended</u>			
		<u>Word of mouth</u>		<u>Press reviews/</u>	
				<u>articles</u>	
Weighted base		4063	(2632)	3749	(1468)
<u>Attracted of production</u>					
<u>attended</u>		%		%	
Playwright		9	(3)	18	(6)
Actors or performers		10	(10)	20	(22)
Recommended		33	(61)	7	(13)
Play or production		9	(4)	14	(17)
Music or composer		8	(7)	11	(6)
Good reviews		4	(6)	19	(13)

Fig 9-13 Distribution of those hearing about the production attended through word of mouth and through press reviews and articles, by attraction of production

Base=those hearing about the production attended through word of mouth or through press reviews and articles

The percentage of those hearing about the production attended through word of mouth who had also chosen it because of a good recommendation was much higher in 1985/86 than in 1981/82. Those who had heard about the production attended through press reviews and articles were much less likely than those who had not seen press reviews or articles to give recommendation as their reason for selecting the production attended.

The percentage of those who had seen reviews and articles who were actually attracted to the production attended by good reviews was small. The actors were a more important attraction for them than good reviews were. The relatively low priority given to good reviews in choosing a production, even among those who had heard about the production through reviews and articles, suggests that critics' reviews of West End productions may be read by audiences as much for information about a production as for the critical judgements.

The following table shows readership of the most read daily and Sunday newspapers and entertainment listings magazines, among those U.K. residents who said they had been attracted to the production attended by good reviews.

Attracted by reviews

	<u>1981/82</u>	<u>1985/86</u>
Weighted base	785	260
<u>Daily papers read</u>	%	%
<u>Times</u>	21	27
<u>Guardian</u>	24	27
<u>Telegraph</u>	24	10
<u>Mail</u>	14	9
<u>London Evening Standard</u>	16	7
<u>Sunday papers read</u>	%	%
<u>Sunday Times</u>	45	34
<u>Observer</u>	31	25
<u>Sunday Telegraph</u>	10	4
<u>Mail on Sunday</u>	3	8
<u>Sunday Express</u>	15	11
<u>Entertainment magazines read</u>	%	%
<u>Time Out</u>	14	14
<u>City Limits</u>	5	2
<u>Event (81/82 only)</u>	2	n/a
<u>What's On (81/82 only)</u>	6	n/a

Fig 9-14 Distribution of those U.K. residents attracted to production attended by reviews, by readership of main daily and Sunday newspapers and of main entertainment listings magazines

More than one answer possible

Base = all those U.K. residents attracted by reviews

Those attracted by good reviews were consistently more likely to read the Guardian, the Sunday Times, Observer and Sunday Express than were those who were attracted by other factors. The only marked difference in readership of the main entertainment magazines between those attracted by good reviews and by other factors was, for 1985/86 only, that those choosing a production because of good reviews were more likely to read Time Out than were those who chose the production for other reasons.

(c) The importance of London theatres as an attraction for overseas visitors

The 1985/86 surveys included a question on how important a factor London's theatres were for overseas visitors in their choice of London as a city to visit. 28% of overseas visitors said they were very important, 35% quite important, and 37% not at all important. There were no major variations in these figures between any of large overseas groups represented in the West End audience. Those who said the theatres were a very important factor were 41% female, those who said they were quite important were 39% female, and those who said they were not at all important were 38% female (compared with 41% of all overseas visitors in 1985/86 being female). This means that London theatres were a very important attraction for 29% of female overseas visitors, and for 27% of male overseas visitors. There was no difference in mean age or mean frequency of London theatre-going in the past 12 months between those who said London theatres were a very important attraction and those who said they were quite important. The mean age of both groups was 35 and their mean frequency of theatre-going 2 visits in the last 12 months, including the performance surveyed. Those who said London theatres were not all important as an attraction were, however, younger than the other two groups, with a lower mean frequency of theatre-going. Their mean age was 33 and their mean frequency of London theatre-going was only 1 visit i.e. the performance surveyed was the only visit they had made to a London theatre in the past 12

months.

The following table shows the percentage of overseas visitors at each category of production who said London theatres were very important, quite important and not at all important as an attraction.

	<u>Category of production</u>				
		<u>Modern</u>	<u>Classical</u>		<u>Modern</u>
	<u>Opera</u>	<u>Dance</u>	<u>Drama</u>	<u>Play</u>	<u>Musical</u>
Unweighted base	79	78	63	63	83
<u>Importance of London</u>					
<u>theatres as an</u>					
<u>attraction</u>	%	%	%	%	%
Very important	52	27	28	61	31
Quite important	29	30	30	20	31
Not at all					
important	19	43	42	19	38

	<u>Category of production</u>				
	<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>
Unweighted base	410	152	130	33	566
<u>Importance of London</u>					
<u>theatres as an</u>					
<u>attraction</u>	%	%	%	%	%
Very important	21	22	23	30	23
Quite important	37	37	35	33	39
Not at all	42	41	42	37	38
important					

Fig 9-15 Distribution of the overseas audience for each category of production, by importance of London theatres as an attraction of the city, 1985/86

Base=all overseas visitors from audiences specifically surveyed for category of production testing

Overseas visitors attending classical plays and opera were far more likely than those attending the other categories of production surveyed to say that London theatres were a very important attraction of the city. Only 19% of the overseas audience at these categories of production said that London theatres were not at all important as an attraction. Evidently the overseas visitors these productions attracted were more likely to be keen theatre-goers than were those attending other types of production. It was probably the case that it was operas and classical plays that were the important theatre attractions of London for a large number of those overseas visitors attracted to London by the theatres. Traditional musicals and comedies had the lowest percentages of overseas visitors among their audiences who said that the theatres were a very important attraction of London. For productions in these categories, the overseas audience was likely to have been drawn largely from among those overseas visitors who were in London primarily on holiday and for whom a theatre visit was part of their general sightseeing programme rather than a strong reason in itself for coming to London.

(2) Deterrents to London theatre-going

Respondents were asked in both survey periods whether there was anything at all that put them off going to the theatre in London. No options were listed on the questionnaire, as it was thought to be important not to prompt respondents on this question. This proved to be the question that was least likely to be answered in both survey periods, probably because many of those who were not deterred by anything did not bother to write in "no, nothing puts me off". In retrospect, this question could more properly have been phrased as "Is there anything at all that puts you off going to the theatre in London more often than you do at present?", since those who were actually deterred would not, of course, be present to be surveyed. 61% of respondents answered this question in 1981/82 and 53% in 1985/86.

The following table shows the distribution of those deterrents to London theatre-going which were specified by respondents. The figures in brackets represent the percentage of those who were deterred by something and who specified that particular deterrent. It is important to bear in mind when assessing the significance of the various deterrents to theatre-going, that the figures represent only those who did reply to this question, and that the base figures are lower than for all the other questions analysed.

	<u>1981/82</u>	
Weighted base	7150	
	% of	% of
	respondents	deterrents
<u>Deterred by</u>	mentioning	mentioned
Ticket prices	18	(26)
Other costs	11	(16)
Parking/traffic	11	(16)
Other travel problems	15	(21)
Booking/paying problems	3	(4)
Productions - quality, type, timings	3	(4)
London - dirty, crowded, violent	2	(3)
Theatre buildings and facilities	2	(3)
Other deterrents	5	(7)
Nothing	30	

Fig 9-16 (a) Distribution of the West End audience, by deterrents to London theatre-going, 1981/82

Base = all respondents

	<u>1985/86</u>	
Weighted base	3487	
<u>Deterred by</u>	% of respondents mentioning	% of deterrents mentioned
Ticket prices	14	(32)
Other costs	9	(20)
Parking/traffic	8	(18)
Other travel problems	4	(9)
Booking/paying problems	2	(4)
Productions - quality,type,timings	2	(4)
London - dirty, crowded, violent	2	(4)
Theatre buildings and facilities	2	(4)
Other deterrents	2	(4)
Nothing	55	

Fig 9-16 (b) Distribution of the West End audience, by deterrents to London theatre-going, 1985/86

Base = all respondents

A much smaller percentage of those responding to this question mentioned deterrents to London theatre-going in 1985/86 than did so in 1981/82. In 1981/82, 30% of those answering the question on deterrents, equivalent to 18% of the total audience, specifically said that nothing put them off going to the London theatre. Since 39% of the audience did not answer this question, it is therefore likely that up to 57% of the total West End audience in 1981/82 were not deterred from going to the theatre in London more often than they did by any of the factors listed in the above

tables. In 1985/86, 55% of those answering the question, equivalent to 29% of the total audience, specifically said that nothing put them off. Since 47% did not answer this question in 1985/86, up to 76% of the total West End audience in 1985/86 were likely not to be deterred by any of the listed factors. Some members of the audience might have had complaints about London theatre-going, but not be sufficiently concerned by them to be positively deterred from making a theatre visit. It would therefore be wrong to assume that those who did not answer this question had no complaints.

Ticket prices were the most often mentioned deterrent. Although a lower percentage of respondents specified ticket prices as a deterrent in 1985/86 than did so in 1981/82, ticket prices accounted for a higher percentage of deterrents mentioned in 1985/86.

Travel problems other than parking or traffic were the second most often mentioned type of deterrent in 1981/82,⁽⁵⁾ and the fourth most often mentioned in 1985/86. Problems with public transport were far less prominent as a deterrent in 1985/86 than in 1981/82, even though the level of use of public transport increased when compared with 1981/82. This would have been linked to the increase in the percentage of the audience who were overseas visitors in 1985/86. Although overseas visitors made heavy use of public transport, most would be staying centrally, so that early departure times of last trains, for example, would be

unlikely to affect them greatly. There would also be less pressure for holiday-makers to get home early than there would for those who might have to rise early for work the following day. Deterrents mentioned in connection with travel other than in private cars were: last trains, tubes or buses leaving too early for most West End finishing times; the tubes being dirty, crowded and dangerous; transport strikes (a particularly prominent feature of the 1981/82 survey period); and the unreliability of public transport services.

The cost, apart from ticket prices, was the second most often mentioned deterrent factor in 1985/86, and the third most often mentioned in 1981/82 (jointly with parking and traffic problems). Costs other than ticket prices which were mentioned as deterrents were: the total cost of the evening out as a package; the cost of transport; the cost of programmes (particularly likely to be resented by Americans, who often indicated, either verbally to the survey teams or in written form on their questionnaires, that they had expected free programmes, as is the case on Broadway); and the cost of in-house catering. Although a lower percentage of respondents mentioned such cost factors as a deterrent in 1985/86 than in 1981/82, these costs accounted for a higher percentage of deterrents mentioned in 1985/86 than in 1981/82.

Parking and traffic problems were the third most often mentioned type of deterrent in both survey periods, in

1981/82 jointly with costs other than ticket prices.

No other deterrents or types of deterrent were mentioned by more than 5% of those answering this question in either survey period. The majority of other deterrents mentioned fell into one of four categories. These were: booking and paying problems (including rude box-office staff, agency surcharges, difficulty obtaining tickets for popular shows, theatres refusing to accept credit cards close to curtain-up, problems getting up-to-date information on ticket availability, and getting through to the box-office on the telephone); aspects of the West End productions themselves, (including poor quality, poor range on offer, no Sunday performances, performances being timed to start too early or finish too late to be convenient); London itself, (including its being dirty, crowded, too full of tourists, dangerous and violent); and theatre buildings and facilities, (including theatres being old-fashioned, cramped, with uncomfortable seating and poor sight-lines, difficult to find, with poor toilet facilities, poor catering facilities, unhelpful ushers and poor air conditioning).

Other deterrents mentioned, which did not fit into one of the above categories, were; noisy audiences, difficulty finding a cheap meal near the theatre, the uncertainty for students of relying on Standby availability, possible terrorist threats, the difficulty of obtaining information about the nature and content of productions, inaccurate or

misleading review quotations being used in publicity, and bad weather making travel difficult. It should be stressed that most of these deterrents were specified by only a few individuals in each case.

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

	<u>Area of Residence</u>					
			<u>London</u>		<u>Rest</u>	
	<u>Overseas</u>		<u>Boroughs</u>		<u>U.K.</u>	
Weighted base	1964	(1229)	2843	(1320)	2324	(902)
<u>Deterred by</u>	%		%		%	
Ticket prices	9	(7)	23	(19)	18	(16)
Other costs	5	(3)	14	(14)	12	(13)
Parking/traffic	5	(2)	14	(12)	13	(11)
Other travel problems	11	(2)	13	(2)	21	(8)
Booking/paying problems	5	(4)	4	(2)	2	(1)
Other	13	(6)	12	(9)	11	(9)
Nothing	52	(78)	20	(43)	23	(44)

Fig 9-17 Distribution of each area of residence group, by deterrents to London theatre-going

Base = all respondents

Overseas visitors who answered this question were much less likely to mention deterrents than U.K. residents were,

Americans in particular often wrote in comments such as "nothing puts me off, it's all wonderful". London boroughs residents were more likely than other U.K. residents to mention deterrents to London theatre-going.

London boroughs residents were the most likely area of residence group to mention ticket prices as a deterrent. Overseas visitors were much less likely to be deterred by ticket prices than U.K. residents were. London boroughs residents were also the most likely group to be deterred by other associated and ancillary costs, overseas visitors least likely.

London boroughs residents were slightly more likely than other U.K. residents to be deterred by traffic and parking problems. Those U.K. residents living outside London were the most likely area of residence group to be deterred by other travel problems.

Overseas visitors were more likely than U.K. residents to be deterred by booking and paying problems, and by factors such as theatre facilities and conditions. Complaints about the lack of air-conditioning in many West End theatres were often made by overseas visitors in the summer months, both verbally to the survey teams, and in written form on their questionnaires.

The following table shows the area of residence

distribution of those mentioning the four most important deterrent factors. 1981/82 figures are given first, 1985/86 figures follow in brackets.

<u>Deterred by</u>				
	<u>Ticket</u>	<u>Other</u>	<u>Parking/</u>	<u>Other</u>
	<u>Prices</u>	<u>Costs</u>	<u>Traffic</u>	<u>travel</u>
				<u>problems</u>
Weighted base	1308 (499)	808 (307)	783 (291)	1100 (148)
<u>Area of</u>				
<u>residence</u>	%	%	%	%
Overseas	14 (16)	12 (11)	12 (9)	20 (17)
London boroughs	52 (50)	49 (60)	51 (56)	36 (30)
Rest U.K.	34 (34)	39 (39)	38 (35)	44 (53)

Fig 9-18 Distribution of those mentioning most important deterrents, by area of residence

Base = all those mentioning ticket prices, other costs, parking/traffic and other travel problems as deterrents to London theatre-going

London boroughs residents accounted for the majority of those deterred by ticket prices and by parking and traffic problems, in both survey periods. There was little change in the area of residence distribution of those deterred by these two factors between the two survey periods.

London boroughs residents also accounted for the largest area of residence group of those deterred by cost factors

other than ticket prices during both survey periods, the majority in 1985/86.

Those from parts of the U.K. other than the London boroughs accounted for the largest area of residence group of those deterred by travel problems other than parking or traffic in both survey periods, the majority in 1985/86.

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

	<u>Sex</u>	
	<u>Female</u>	<u>Male</u>
Weighted base	4168 (1702)	2968 (1781)
<u>Deterred by</u>	%	%
Ticket prices	19 (16)	17 (12)
Other costs	12 (11)	11 (7)
Parking/traffic	10 (7)	12 (9)
Other travel problems	16 (6)	14 (3)
Booking/paying problems	3 (2)	3 (2)
Other	10 (8)	14 (9)
Nothing	31 (51)	29 (59)

Fig 9-19 Distribution of each sex, by deterrents to London theatre-going

Base = all respondents

Women were more likely than men to say that nothing put them off going to the London theatre in 1981/82, men more likely than women to do so in 1985/86. This is probably linked to the higher percentage of men who were from overseas in 1985/86 than in 1981/82. Women were more likely to be deterred by ticket prices, by other costs and by travel problems other than parking or traffic than men were. Men were more likely than women to be deterred by problems with parking and traffic. Women were more likely than men to specify a fear of violence in London as a deterrent, particularly elderly women, although fear of violence was not in itself a very significant deterrent overall.

The following table shows the sex distribution of those mentioning the four most important deterrent factors. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Deterred by</u>			<u>Other</u>
	<u>Ticket</u>	<u>Other</u>	<u>Parking/</u>	<u>travel</u>
	<u>Prices</u>	<u>Costs</u>	<u>Traffic</u>	<u>problems</u>
Weighted base	1307 (490)	801 (305)	780 (289)	1098 (144)
<u>Sex</u>	%	%	%	%
Female	60 (55)	60 (60)	53 (44)	61 (70)
Male	40 (45)	40 (40)	47 (56)	39 (30)

Fig 9-20 Distribution of those mentioning most important deterrents, by sex

Base = all those mentioning ticket prices, other costs, parking/traffic and other travel problems as deterrents to London theatre-going

Women consistently accounted for the majority of those deterred by ticket prices, other costs, and travel problems other than parking or traffic. Women were particularly prominent among those mentioning public transport problems as a deterrent. Men accounted for the majority of those deterred by parking and traffic problems in 1985/86.

The following table shows the distribution of each age group by deterrents to London theatre-going.

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	564	1276	1904	1418	1067	632	282
<u>Deterred by</u>	%	%	%	%	%	%	%
Ticket prices	12	22	20	16	18	16	15
Other costs	12	14	10	10	10	11	11
Parking/traffic	8	6	13	15	13	10	8
Other travel problems	19	16	12	13	15	18	19
Booking/paying problems	2	3	3	3	3	1	1
Other	7	9	14	13	14	11	18
Nothing	40	30	28	30	27	33	28

Fig 9-21 (a) Distribution of each age group, by deterrents to London theatre-going, 1981/82

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	404	763	828	643	406	248	140
<u>Deterred by</u>	%	%	%	%	%	%	%
Ticket prices	6	22	17	11	14	9	7
Other costs	14	8	9	7	8	8	4
Parking/traffic	5	3	8	13	12	7	5
Other travel problems	3	2	5	5	3	7	3
Booking/paying problems	2	2	2	2	2	3	3
Other	11	3	8	9	7	9	12
Nothing	59	60	52	54	54	57	67

Fig 9-21 (b) Distribution of each age group, by deterrents to London theatre-going, 1985/86

Base = all respondents

The 16-18's were the most likely age group to say that nothing put them off going to the theatre in London in 1981/82; in 1985/86 it was the 65 and overs who were the most likely to do so. All age groups were more likely to say that nothing put them off in 1985/86 than they were in 1981/82.

The 19-24's were the most likely age group to mention ticket prices as a deterrent. They were the only age group who did not mention ticket prices less often in 1985/86 than in 1981/82. The 16-18's were the least likely age

group to mention ticket prices as a deterrent, presumably because many of them would have had their tickets bought for them by parents, or obtained student discounts. They were, however, the age group most likely to be deterred by other costs in 1985/86.

The 35-44's were consistently the most likely age group to be deterred by parking and traffic problems. The 16-18's and 65 and overs in 1981/82, and the 55-64's in 1985/86, were the most likely age groups to be deterred by travel problems other than traffic and parking.

The 65 and overs were the age group most likely to mention deterrents to London theatre-going other than the major ones, especially those associated with being out in London late at night such as fear of violence and difficulty getting home.

The following table shows the age distribution of those mentioning the four most important deterrent factors. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Deterred by</u>			<u>Other</u>	
	<u>Ticket</u>	<u>Other</u>	<u>Parking/</u>	<u>travel</u>	
	<u>Prices</u>	<u>Costs</u>	<u>Traffic</u>	<u>problems</u>	
Weighted base	1300 (489)	802 (300)	771 (280)	1094 (141)	
<u>Age group</u>	%	%	%	%	
16 - 18	5 (5)	8 (21)	6 (8)	10 (9)	
19 - 24	22 (33)	23 (20)	11 (9)	21 (11)	
25 - 34	31 (29)	25 (25)	31 (25)	23 (32)	
35 - 44	17 (16)	18 (15)	26 (31)	16 (28)	
45 - 54	14 (12)	14 (10)	17 (19)	14 (9)	
55 - 64	7 (4)	9 (6)	7 (5)	11 (8)	
65 and over	3 (2)	4 (2)	3 (3)	5 (4)	
Mean age					
(actual)	35 (33)	36 (31)	37 (37)	36 (36)	

Fig 9-22 Distribution of those mentioning most important deterrents, by age group

Base = all those mentioning ticket prices, other costs, parking/traffic and other travel problems as deterrents to London theatre-going

Those deterred by parking and traffic problems had the oldest mean age in both survey periods. Those deterred by ticket prices had the youngest mean age in 1981/82, and those deterred by other costs the youngest mean age in 1985/86. The mean ages of those deterred by both types of cost decreased in 1985/86. The mean age of those deterred by cost factors in 1985/86 was considerably younger than that of those deterred by transport factors, which remained

the same in both survey periods.

The following table shows the distribution of each of the frequency groups of London theatre-going analysed in section 1 of Chapter 4, by deterrents to London theatre-going. 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	1565	(1076)	1682	(923)	2826	(1138)	1062	(333)	
<u>Deterred by</u>	%		%		%		%		
Ticket prices	13	(10)	20	(18)	20	(15)	19	(12)	
Other costs	10	(8)	12	(9)	11	(10)	10	(9)	
Parking/traffic	7	(6)	12	(5)	14	(12)	11	(8)	
Other travel									
problems	18	(5)	17	(4)	14	(4)	11	(2)	
Booking/paying									
problems	3	(2)	2	(2)	4	(2)	2	(3)	
Other	11	(7)	7	(5)	12	(10)	18	(10)	
Nothing	39	(63)	30	(57)	25	(47)	29	(56)	

Fig 9-23 Distribution of each frequency group, by deterrents to London theatre-going

Base = all respondents

New visitors were the most likely frequency group to say that nothing put them off going to the theatre in London,

frequent theatre-goers the least likely.

It was the occasional and frequent theatre-goers who were most likely to be deterred by ticket prices, although regular theatre-goers would spend more on theatre tickets in a typical year because of their higher mean frequency of London theatre-going. However, if ticket prices had been a very important deterrent for regular theatre-goers, they would by definition not be regular theatre-goers. New visitors were the least likely frequency group to be deterred by ticket prices. There was little difference among the frequency groups in the deterrent effect of other costs.

Parking and traffic problems were most likely to be a deterrent to frequent theatre-goers, other travel problems to new visitors.

The following table shows the frequency distribution of those mentioning the four most important deterrent factors. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Deterred by</u>							
	<u>Ticket</u>	<u>Other</u>	<u>Parking/</u>	<u>Other</u>				
	<u>Prices</u>	<u>Costs</u>	<u>Traffic</u>	<u>travel</u>				
Weighted base	1304	(490)	799	(304)	774	(284)	1093	(132)
<u>Visits in</u>								
<u>previous 12 mths</u>	%		%		%		%	
This is first								
visit	15	(19)	18	(24)	13	(22)	24	(35)
1 other	12	(19)	12	(16)	11	(6)	15	(15)
2 others	13	(15)	15	(11)	13	(11)	11	(19)
3-6 others	30	(27)	29	(29)	32	(41)	26	(19)
7-11 others	14	(11)	12	(11)	16	(11)	10	(7)
12 or more								
others	17	(10)	13	(10)	16	(9)	13	(4)
Mean frequency								
(actual)	3	(2)	3	(2)	3	(3)	3	(2)

Fig 9-24 Distribution of those mentioning most important deterrents, by frequency of London theatre-going
 Base = all those mentioning ticket prices, other costs, parking/traffic and other travel problems as deterrents to London theatre-going

Those deterred by ticket prices contained the highest percentage of those who had made 12 or more other visits to London theatres in the last 12 months in 1981/82. Despite the fact that regular theatre-goers were so prominent among those deterred by ticket prices, it is likely that the cost is merely felt to be high by regulars rather than that the

cost has seriously reduced their theatre-going frequency. It may be, however, that this group of keen theatre-goers would attend the London theatre more frequently if tickets were significantly cheaper.

Those deterred by parking or traffic problems had a high mean frequency of London theatre-going, the highest of those groups examined in detail in 1985/86.

Those deterred by travel problems other than traffic and parking were consistently the most likely of the groups examined to be on their first visit to a London theatre in 12 months. Concern about problems with travel to and from the theatre may have caused this group to visit the London theatre infrequently.

The following table shows selected demographic and frequency of theatre-going variations between those who mentioned deterrents to London theatre-going and those specifically saying that nothing put them off. 1981/82 figures are given first, 1985/86 figures follow in brackets.

	<u>Mentioning</u>	<u>Not Deterred</u>
	<u>Deterrent</u>	
Weighted base	4976 (1544)	2174 (1943)
	%	%
Overseas	19 (18)	48 (50)
London boroughs	45 (49)	27 (30)
Rest U.K.	36 (33)	25 (20)
Female	58 (53)	60 (46)
Mean age (actual)	37 (34)	33 (33)
Mean frequency (actual)	3 (3)	2 (2)

Fig 9-25 Selected demographic and related variations
between those mentioning and not mentioning
deterrents to London theatre-going

Base = all respondents

Those mentioning deterrents were much more likely to be U.K. residents than those who were not deterred.

Those mentioning deterrents were more likely to be male than those not deterred in 1981/82; the reverse was true in 1985/86.

Those mentioning deterrents had a higher mean age than those who were not deterred, and a higher mean frequency of London theatre-going. At first sight, it appears paradoxical that those mentioning any deterrents to London theatre-going had a higher mean frequency of London theatre-going than those who were not deterred. However,

in the case of the former, the more often they attended the London theatres, the more likely they were to encounter any of the problems which might be endemic to London theatre-going, while for those who did not go to the London theatre very often, a theatre visit was perhaps a special occasion, and they would therefore be less likely to take potential deterrents into consideration when making a rare theatre visit.

Notes to Chapter 9

- (1) All the opera surveys in both survey periods took place at productions by the English National Opera company. Singers would probably have featured more prominently as an attraction had some of the opera surveys been carried out at the Royal Opera House, which more commonly stages performances featuring very well-known singers than ENO does.

- (2) See Chapter 2 for an account of the relatively young mean age of the dance audience.

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

- (4) See note (4), Chapter 2 for details of method used to calculate mean frequency of London theatre-going.

- (5) Fuller details of travel problems encountered by theatre-goers, which they did not necessarily regard as deterrents to London theatre-going, are given in section 3, Chapter 5.

CHAPTER 10 CONCLUSIONS

The audience for theatres in London's West End has been described and analysed in the foregoing study. A comparison of the results of this research with those for theatres in the U.K. outside London may enable some conclusions to be drawn about U.K. theatre audiences generally.

While the information that is available on the audience for theatres in the U.K. outside London is not as comprehensive as that for London theatres, and while such information has not been co-ordinated or collated on a national basis, nevertheless three broad trends in audience profiles outside London emerge from reading a sample of the available survey reports.⁽¹⁾ These are: that the majority of theatre audiences tend to be female; that the audience overall is highly educated; and that the 25-44 age groups tend to be the most important.

In the West End, the majority of the audience were female in 1981/82, and a slight majority were male in 1985/86. However, if the U.K. resident section of the West End audience only is examined, for both survey periods, the majority are female.⁽²⁾ Women accounted for 52% of the U.K. population aged 15 and over at the 1981 census,⁽³⁾ and they accounted for considerably more than 52% of the audience at the great majority of U.K. theatres for which audience surveys were reviewed. Women living in the U.K.

are therefore more likely to be theatre-goers than men are.

Like the West End audience, high percentages of audiences outside London had been educated to at least the usual U.K. tertiary level education age. The West End findings indicate that it is not just those types of productions which might have been supposed to appeal to groups with a high percentage of graduates, such as opera and classical plays, which in fact attract such audiences. There is evidently a link between final educational level and likelihood of attending the theatre at all.

Although the 25-34's are the most important group of West End theatre-goers, the age distribution of the West End audience is in general younger than that found in theatres outside London. In particular, for categories of production such as classical plays and opera, the audiences generally have younger mean ages than are found for similar productions outside London, even though audiences for these categories have some of the highest mean ages to be found in the West End.⁽⁴⁾

The demographic profiles of West End and other U.K. theatre audiences are clearly not very different, especially when the large overseas component, which appears to be unique to the West End, is excluded from the analysis. This suggests that there are certain types of people among the U.K. population who tend to be theatre-goers. Education level

is evidently a major factor in likelihood of visiting the theatre, and women appear to be more interested in the theatre than men are.

As well as certain groups being apparently more likely than others to attend the theatre generally, the choice of which production to attend in the West End also appears to be related to social factors. There was relatively little change in the age distributions of audiences for each of the categories of production examined in the West End between the main two survey periods, even though there was a gap of three to four years between the survey periods. If those people who make up the audience for a particular category of production form a largely static group, one would expect to have seen mean ages increase between the two survey periods. Since this did not happen, the category of production that people chose to visit would therefore appear to be to some extent dependent on their age group. The audience for a particular category of production may therefore be part of a self-replenishing pool. The view sometimes expressed by marketing managers when discussing some types of production, and opera in particular, is that the audience is old and that therefore their marketing should be concentrated on gaining new young audiences to replace them, since otherwise the current audience will literally die out. This would appear to be fallacious. The findings of this research suggest that going to the opera is something one typically does in one's 40s, whereas in one's early 20s, for example, one commonly

goes to musicals.

In the case of some categories of production, there are obvious likely reasons for the link between theatre-going behaviour and social factors. For example, tickets for opera are the most expensive of any category in the West End⁽⁵⁾. It is therefore not unreasonable to assume that likelihood of attending the opera is related to disposable income and consequently to age group. Those aged around 40 could be expected to have reasonably large incomes, and if they have had children, to have reached the stage where the children are no longer financially dependent. While the primary reason for opera's acquiring a largely middle-aged audience was probably financial, there may also be a process whereby opera comes to be perceived as 'something for the middle-aged because that is the audience it currently attracts. The social factors which influence people's cultural behaviour may become more entrenched and rigid as that behaviour comes to be seen as something that only certain groups do.

The findings of both the West End and other U.K. theatre audience surveys therefore suggest that social factors play a major role in determining cultural behaviour, and that this behaviour can largely be predicted from a person's sex, educational background, and current age. If this conclusion is accepted, it is possible to say that a production of a certain type will tend to attract a particular type of theatre-goer. The practice of targeted

marketing, of promoting a production specifically to a particular, well-defined group, therefore becomes an obvious prime use of audience research. It is a truism of arts marketing that it is easier to increase attendances by persuading current theatre-goers to go more often than they do at present, than it is to do so by gaining new audiences, and audience research is the means by which the current audience can be determined. Patterns of readership of newspapers and periodicals and of radio listening, and of stated reasons for choosing which production to attend, also proved to be linked to demographic and social factors, a further confirmation of the thesis that cultural behaviour is largely socially determined. The marketing manager can therefore obtain guidance from audience survey findings not just in defining his target market, but also in establishing the best ways of reaching that group, and what aspects of the production to promote to them.

Wider policy questions are also raised by audience research findings. When the audience is defined, the gaps in that audience become evident. The available research on U.K. resident theatre audiences indicates that it is a highly educated minority of the population who attend the theatre. Those categories of production in the West End which tend to contain the highest percentages of those who have received full-time education to the usual U.K. tertiary level age, and which probably attract a small number of individual theatre-goers, such as classical plays, dance

and opera,(6) are by and large the only ones to receive public subsidy. If the audience for theatre in the U.K. consists of a small, well-educated minority, then subsidy, in the West End theatre at least, could be said to be funding the entertainment of an even smaller and more highly educated minority. One might ask, on reaching this conclusion, whether the publicly-funded theatres have an obligation to fill the gaps in the audience. While it might be thought to be desirable for the subsidised theatre to expand the base of its audience, the findings of this research do not offer guidance as to how this might be achieved. Rather, they suggest that cultural preferences are a product of factors which it is beyond the scope of policy-makers in the arts to influence. If such preferences have become entrenched, there may be little that can be done to expand the base of the audience.

The example of five surveys which were conducted at performances of Robert David MacDonald's Summit Conference in 1982⁽⁷⁾ confirm the view that cultural behaviour, however originally arrived at, tends to become entrenched. This production was a modern drama, giving a controversial treatment of a fictitious meeting between Eva Braun and Clara Petacci. It featured Glenda Jackson in the leading role. The survey results showed that a high percentage of the audience were of the type of infrequent theatre-goer more commonly found at categories of production such as musicals and comedies than at other modern dramas surveyed. Glenda Jackson's name was by far the most important

attraction for this type of theatre-goer among these audiences. Conversations with many members of the audience during these surveys, most of whom approached the survey teams expressing outrage, showed that they had supposed from the appearance of Glenda Jackson, whom they knew from her television work, that they were going to see a straight-forward historical play, and that they felt they had in some sense been "cheated", although they could not say precisely why they felt in this way. Clearly, the sense of expectation about productions according to audience pre-conceptions of what type of production is being presented, and the effect of cultural habits, are very strong, and are therefore likely to be difficult to change or influence. Certain types of theatre-goer, it appears, will tend to enjoy certain types of production, and any experiments they may either make themselves, or be persuaded by marketing managers to make, can lead to disappointment and bewilderment. One is led to conclude from these research findings that the job of the theatre administrator should be to keep the audience informed, and to cater to already formed audience preferences, rather than to try and create new audiences or to persuade people to experiment with productions of a type they had not previously visited.

If West End audiences can not easily be changed or influenced in their theatre-going behaviour, then it may be proposed that the theatre repertoire, or related aspects of theatre-going should be changed. For example, if a boom

in overseas tourism were predicted, it might be thought desirable to change the West End repertoire in favour of having more musicals and thrillers, since these are popular productions with overseas visitors. However, such a change might result in the locally resident audience losing their theatre-going habits if fewer new plays, for which they are the core audience, were mounted, and the West End might be unable to recapture that audience when the tourist boom was over. On the other hand, if it was decided to alter the repertoire to include more new plays, in order to build up and maintain a strong local audience, much overseas business might be lost during the peak tourist season owing to insufficient capacity being available for productions such as thrillers and musicals, which are popular with overseas visitors, especially since many of the major musicals playing in the West End at the time of writing have been sold out virtually continuously since they opened.⁽⁸⁾ In fact, there is little danger of such a major change in the West End repertoire occurring as a result of policy decisions, since there is no centrally determined artistic policy for the West End. SWET is essentially a trade association, representing the interests of members; it can advise members on what the best course of action might appear to be as suggested by the surveys, and can market the concept of the West End theatre on a corporate basis, but it has no say in any overall decisions which may affect the West End repertoire. This example does, however, illustrate the potential drawbacks of using audience survey results to attempt to alter aspects of theatre-going in order to try and fill the gaps in the

audience. If the theatre is changed in some way in order to attract new or additional audiences, the old ones may be lost. Even such a minor change as responding to the preferred performance timings of particular groups of theatre-goers being targeted, by making timings earlier or later than at present, would have the effect of excluding those groups who found the new timings inconvenient. For example, if starting times were generally made earlier than at present, those who drive in to the London theatre after work from the home counties and further afield would not be able to get into London in time, while those who were concerned about being out in London late at night, whether for travel reasons or through fear, could be deterred from attending if performance timings were made substantially later.

One example from the experience of the SWET marketing office does, however, indicate that it may be possible to change the base of the audience without having to change the repertoire. Although there is no way of establishing a conclusive link between the two, it is worth noting that the number of Scandinavians in the West End audience increased about five-fold between the 1981/82 and 1985/86 survey periods, and that the SWET marketing office mounted the first major promotion of West End theatre in the Scandinavian countries, aimed primarily at the travel industry, in 1983 and 1984. It is likely that what happened was that the Scandinavian tourist became better informed than he was in the past about London theatres, and

that it was therefore made easier for him to visit them, having already been interested in the theatre. This is, therefore, less likely to be a case of cultural patterns being broken, than of a demand being catered to, and of the marketing manager fulfilling her role of informing those who are interested in the theatre.

The most useful role of audience research therefore lies not in providing the stimulus for major changes in policy, but in informing theatre managements of the context within which they operate, so that they can make use of research in planning their marketing. In the West End, corporate marketing schemes such as the Senior Citizens' Matinee scheme and the Sixth Former Standby scheme are examples of marketing promotions which have resulted from the SWET marketing office learning about both audience profiles and about the size of the likely market for such schemes from audience research. Negotiations with bodies such as Westminster City Council, the British Tourist Authority, London Regional Transport, and the lobbying of MPs have been rendered more effective by the ability of SWET to speak with confidence about who constitutes its audience, and what their theatre-going behaviour is, and to back this up with independently established statistical information.

Audience research, therefore, is most useful and important in defining the context within which the arts administrator, and especially the marketing manager, has to work, in a quantifiable way.

Notes to Chapter 10

- (1) The Bibliography gives a complete list of survey reports reviewed.

- (2) The shift in the balance between the sexes among the West End audience in 1985/86 was due to the large increase in the percentage who were from overseas, with overseas visitors to West End theatres being consistently more likely to be male than female. The percentage who were from overseas among audiences outside London tended to be very much lower than was the case in the West End.

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

- (4) See Chapter 2 for an account of the mean ages of West End audiences analysed by category of production, and Chapter 3 for an account of the age distribution of the West End audience overall.

(5) During the calendar year nearest to the 1981/82 survey period, for example, the average price asked for an opera ticket in the West End was £9.83, while the average price asked in the West End overall was £6.87. Source, Gardiner, Caroline West End Theatre Attendances, annual unpublished report for SWET, from 1981 onwards.

(6) Mean frequency of theatre-going was high among audiences for productions in these categories, suggesting that repeat visits by the same individuals accounted for a high percentage of total sales in the category, and that therefore the actual size of the audience was small. See Chapter 2 for an account of mean frequencies of theatre-going for each category of production audience.

(7) Further details about this production, and all productions surveyed, are given in Appendix 4.

(8) For example, Cats, and Phantom of the Opera, both Andrew Lloyd Webber musicals, and Les Miserables by Alain Boulbil, Claude-Michel Schonberg, and Herbert Kretzmer, have been sold out continuously since within a few weeks of their opening. Cats has, at the time of writing, been running for six years.

Article by Bernard Levin, from the Sunday Times, January 29th, 1978, on the Wyndhams' Theatre Group audience research

THE ARTS

ANY DICTIONARY of theatrical clichés would be incomplete if it did not include the one about the London theatre 'only being kept alive by the foreigners in the audience. But as I have so often had occasion to remark, one of the points about a truism is that it is very often true, and the truth of this one is demonstrated with frightful conclusiveness from some exhaustively detailed figures I have obtained from Sir Donald Albery.

Donald Albery, who is the present head of one of those theatrical dynasties which seem to flourish in this country as nowhere else, is Chairman of Wyndham Theatres Ltd; his firm runs four West End theatres—Wyndham's, the Criterion, the Albery (formerly the New) and the Piccadilly, with a total seating capacity of some 3,360, out of a total of roughly 40,000 for

the London "mainstream" theatre, excluding opera-houses and concert-halls. Though Sir Donald is not one of those theatrical producers whose shows bear an immediately recognisable stamp, he has always been an eclectic seeker of good entertainment, and the wide range of plays put on under his aegis is probably fully representative of London's traditional theatre; in other words, there is no escaping the grim conclusions of his evidence by saying that the facts from other West End playhouses would tell a different story. At present, I may say, they tell no story at all; Sir

Donald, expresses himself with some vigour on the failure of other theatres to do the kind of audience research he does.

That research takes the form of a complete census of every purchaser of a ticket at his box office windows on the first Monday of every month, together with (an innovation this year) a similar inquiry conducted on his behalf at ticket agencies. He has followed this practice for a good many years, and the pattern disclosed is sensational in what it implies.

In 1972, overseas theatre-goers provided 34 per cent (I have rounded all figures for convenience) of the cash taken; in 1976 (the 1977 figures are not yet available, but are virtually bound to show a further progression) it was 45 per cent. But the proportion of sales to foreigners at agencies—and agencies account for something like 40 per cent of total theatre business—is 20 per cent higher than those made at the theatre box offices, which means that we have to add roughly 8 per cent to the total. There can thus be little doubt that in London's principal theatres over half of the money taken now comes from overseas.

Sir Donald's research extends to putting this in cash terms. If you include the appropriate proportion of what is spent in our theatres on things other than the tickets (bar-sales, souvenirs, programmes, ices, etc.), the average paid per foreigner per seat per annum is roughly £250.

The sickness at the heart of London's theatre

BERNARD LEVIN reveals a disturbing survey into the changing character of West End audiences

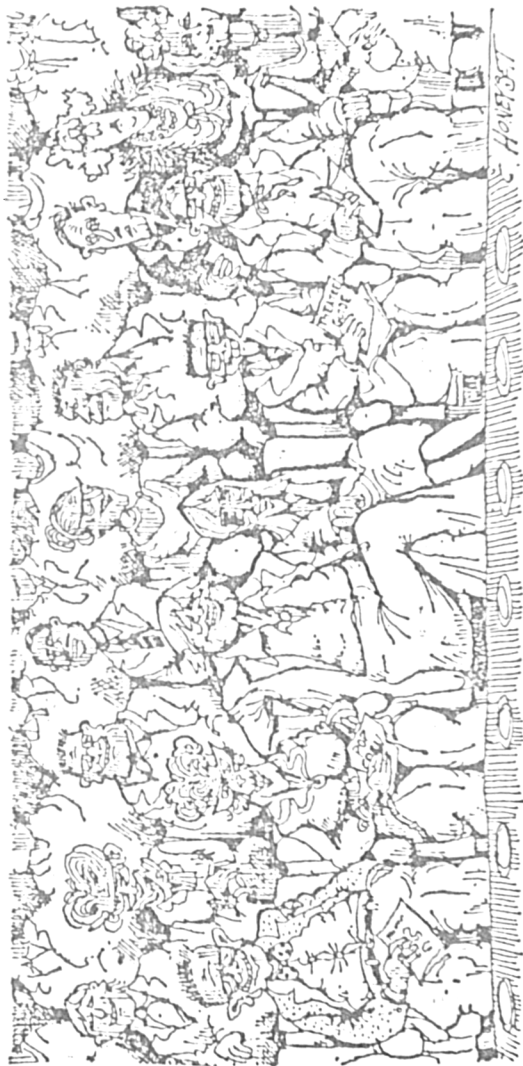


Nor should anyone imagine that it is only in the summer tourist months that this sort of pattern can be seen, though it would not be particularly comforting if it were. In November, 1976, for instance—hardly a time when foreigners come flocking to bask in the sunshine of Shaftesbury Avenue—46 per cent of the money in the theatrical till came from abroad, and the percentage was the same in April of that year. And if you look at the agencies (which do two-fifths of London's theatrical business, remember), the picture is more startling. In the census taken in September, 1977, 79 per cent of seats went to foreigners.

Now assuming, as is reasonable, that no significant deviation from these figures would be seen if such a portrait of theatre-goers throughout the whole of the West End were compiled, it seems that, excluding concert-halls and opera-houses (though Sir Donald's research does not exclude them, and indeed my remarks apply with equal force to them), the principal London theatres between them bring in well over ten million pounds a year of foreign currency.

Well, bully for the balance of payments; but it is not as simple as that. To start with, though the London theatre's proportion

The article continues on the following page.



the proportion of native bottoms on naive seats is steadily falling, from two-thirds in 1972 to a half in 1976. If the trend continues, we shall need a steadily increasing proportion of foreigners to keep our theatres open, and it does not necessarily follow that they will appear merely because we need them.

Can it be that London is losing the very habit of theatre-going, as much of the rest of the country did long ago? If so, the implications are serious for us all, and not just those who earn their living by that precarious trade. Fools will say that the theatre doesn't get audiences because it doesn't put on good enough plays; a glance down the theatre listings in any newspaper proves this contention to be nonsense. For there is no theatrical taste, from that of the most elevated student of the classics to that of the most depraved sex-maniac, which is not catered for by the very best in the required genre.

I have no solutions to propose, though I hope I may turn out to have started a debate from which something constructive will eventually emerge. But the figures, though I have spoken for them, really speak most eloquently for themselves, and they speak truths most uncomfortable to those people who love the theatre, who know that it is at its finest in London, and who want to see it survive and thrive.

exchange-values or a threatening cloud over its international relations for many foreigners, especially those who have intercontinental distances to travel (which, after all, includes visitors from all the other English-speaking nations), to decide to stay at home. Alternatively, you can put it the other way round; if the London theatre were to shrivel and die, the enormous pull it exerts on visitors from overseas would be substantially weakened, with a consequent loss in foreign earnings of potentially ruinous proportions. (No doubt the Government, faced with these revelations, will instantly de-

of all money received from foreign tourists is only about one per cent, British Tourist Authority research reveals that no fewer than half of our overseas visitors give "theatre" as one of the four chief reasons for their visits, the other three being general sightseeing, shopping, and museums and galleries. What follows? Well, you can look at it from either end. Obviously, the London theatre would drop dead overnight if the foreigners stopped coming; indeed, it could not long survive if there were any substantial diminution in their numbers, and it would only take a hiccup in the world's currency

ise still further ways of taxing the theatre into extinction.) But there is a much more ominous conclusion staring us in the face from these figures. There are, as I have said, some 40,000 seats in London's principal playhouses. If half of these, on average, are occupied by foreigners the year round, it does not need mathematical gifts of an exceptionally high order to calculate that only half are occupied by those who are native here and to the manner born. Can London, and Britain's own visitors to London from the rest of the country, really not fill more than 20,000 theatre seats a night? And note also that

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APPENDIX 2

Members of Research Working Party at November 1981.

Posts listed are those held at the time of membership.

Hilary Bauer, Office of Arts and Libraries.

Jules Boardman, Head of Marketing, National Theatre.

Vincent Burke, Development Officer, SWET.

Caroline Gardiner, Department of Arts Administration, City University.

Gillian Gardner-Smith, Research Service Manager, British Tourist Authority.

Peter Harlock, Publicity Controller, Royal Shakespeare Company.

Michael Guine, Director of Arts Administration Studies, Department of Arts Administration, City University.

Stewart Rigby, Senior Research Executive, British Tourist Authority.

Peter Verwey, Senior Marketing Officer, Arts Council of Great Britain.

Norman Wolf, Office of Arts and Libraries.

Richard York, Deputy Administrator, Barbican Centre.

APPENDIX 3

SWET member theatres at December 1987.

Theatres which have joined since November 1981 are indicated with *. Note that there are periodic changes in membership, and not all the theatres listed will have been members continuously since 1981.

Adelphi	Mermaid	Vaudeville
Albery	National, Cottesloe	Westminster *
Aldwych	National, Lyttelton	Whitehall *
Ambassadors	National, Olivier	Wyndham's
Apollo	New London	
Apollo Victoria *	Old Vic	
Barbican Theatre *	Open Air, Regent's Park	
Barbican, The Pit *	Palace	
Coliseum	Palladium	
Comedy	Phoenix *	
Covent Garden	Piccadilly	
Criterion	Prince Edward	
Donmar Warehouse	Prince of Wales	
Drury Lane	Queen's	
Duchess	Royal Court,	
Duke of York's	Royal Court, Upstairs	
Fortune *	Royalty *	
Garrick	Sadler's Wells	
Globe	Savoy	
Haymarket	Shaftesbury	
Her Majesty's	St. Martin's	
Lyric	Strand	
Mayfair	Victoria Palace *	

APPENDIX 4

Details of productions surveyed.

Each production is listed as follows;

1. Date of survey
2. Name of play/production
3. Theatre at which survey took place.
4. Author/composer/choreographer etc.
5. A brief description of the production, with any particularly noteworthy points, e.g. well-known leading actors.

1. 23rd November 1981 No Sex Please, We're British

Strand Theatre

Anthony Marriott and A. Foot

Comedy. This production had run for 10 years at the time of the survey, and was a West End institution.

2. 18th December 1981 All My Sons

Wyndham's Theatre

Arthur Miller

Modern drama. A family learns of the father's dishonest arms profiteering in World War II. Colin Blakely and Rosemary Harris took the leading roles.

3. 23rd December 1981 The Mitford Girls

Globe Theatre

Caryl Brahms and Ned Sherrin

Traditional musical. Dramatised biography of the Mitford sisters. Patricia Hodge played Nancy Mitford.

4. 7th January 1982 The Sooty Show

Mayfair Theatre

Matthew Corbett, Jr.

Children's/ family show. Popular and long standing glove puppet show, with characters who appeared in a television version of the show. An annual Christmas/ New Year event at the Mayfair.

5. 8th January 1982 Treasure Island

Mermaid Theatre

Adapted from the book by Robert Louis Stevenson by Bernard Miles, Joesphine Wilson, and Robert Coe.

Children's/family show. With Tom Baker, well-known as BBC television's Dr. Who, as Long John Silver.

6. 2nd March 1982 Richard II

Aldwych Theatre

William Shakespeare

Classical play. Royal Shakespeare Company production, with Alan Howard in the title role.

7. 8th March 1982 Amadeus

Her Majesty's Theatre

Peter Shaffer

Modern drama. West End transfer of National Theatre production. Deals with the possible murder of Mozart by rival composer, Salieri. A controversial portrayal of Mozart as juvenile and given to obscenities.

8. 9th March 1982 Educating Rita

Piccadilly Theatre

Willy Russell

Comedy. West End transfer of RSC production of award-winning play about a working-class woman's relationship with her Open University tutor.

9. 11th March 1982 Evita

Prince Edward Theatre

Tim Rice (lyrics) and Andrew Lloyd Webber (music).

Modern musical. Fictional biography of Eva Peron.

Several hit songs came from this musical. e.g.

Don't cry for me, Argentina

10. 16th March 1982 Underneath the Arches

Prince of Wales Theatre

Devised by Patrick Garland, Brian Glanville, and Roy Hudd.

Revue. Song, dance and sketches, recounting the life stories of the comedy team Flanagan and Allen and the Crazy Gang, who were very popular in the 1940's, and using much of their original material. A transfer from Chichester Festival Theatre.

11. 17th March 1982 They're Playing our Song

Shaftesbury Theatre.

Marvin Hamlisch and Carol Bayer Sager.

Musical comedy, supposedly based on the on-off relationship of Hamlisch and Bayer Sager. Tom Conti and played the leading male role.

12. 19th March 1982 The Portage to San Cristobal of A.H.

Mermaid Theatre.

Christopher Hampton, from the book by George Steiner.

Modern drama. "A.H.", a war criminal hiding out in South America, is captured by Jewish Nazi hunters.

13. 24th March 1982 Ballet Rambert

Sadlers Wells Theatre

Dance. Programme of modern dance works, by an established U.K. contemporary dance company, which performs to both classical and modern music.

14. 25th March 1982 Manon

London Coliseum

Massenet.

Opera. English National Opera production of French 19th Century, an opera which is generally considered to be a romantic tragedy.

15-18. 21st, 22nd, 24th, and 26th May Pass the Butler

Globe Theatre

Eric Idle

Comedy. First stage play by a former star of the popular BBC comedy series Monty Python's Flying Circus, seen by the critics as being very derivative of the work of Joe Orton.

19. 15th July 1982 Cats

New London Theatre

Andrew Lloyd Webber (music) Lyrics from T.S. Eliot's Old Possum's book of Practical Cats

Modern musical. Based on the Eliot book, with the performers impersonating cats. A number of hit songs came from this show, e.g Memory. One of the most popular shows in London, sold out virtually continuously since it opened in May 1981.

20. 20th July 1982 Educating Rita, repeat survey

21. 23rd July 1982 Summit Conference

Lyric Theatre

Robert David MacDonald.

Modern drama. The writer is well-known for his work with the Glasgow Citizen's Theatre Company. Glenda Jackson and Georgina Hale appeared as Eva Braun and Clara Petacci, holding their own "summit conference" while Hitler and Mussolini confer.

22. 27th July 1982 Pirates of Penzance

Theatre Royal, Drury Lane.

Gilbert and Sullivan, restaged by Joseph Papp.

Traditional musical. Thought by the critics to be fairly faithful to the original, although there was some re-scoring of the music. Tim Curry, George Cole and Pamela Stephenson played the leading roles.

23. 28th July 1982 Royal Ballet School

Sadlers' Wells Theatre.

Dance. The School's annual showcase for its pupils.

24. 2nd August 1982 Underneath the Arches, repeat survey

25. 3rd August 1982 All's Well that ends Well

Barbican Theatre

William Shakespeare

Classical play. A Royal Shakespeare Company production of a rarely performed Shakespeare. The leading female roles were performed by Dame Peggy Ashcroft and Harriet Walter. This was the production in which Harriet Walter first received considerable public attention.

26. 9th August 1982 Cards on the Table

Vaudeville Theatre

Adapted from the novel by Agatha Christie by Leslie Darbon.

Thriller. Gordon Jackson played the Inspector.

27. 9th August 1982 Tosca

London Coliseum

Puccini.

Opera. English National Opera production of a very popular early 20th century opera. Generally regarded as a melodrama, a standard repertoire work

28-31. 13th, 15th, 18th and 23rd October Summit Conference,
repeat surveys

32. 1st November 1982 Underneath the Arches, repeat survey

33. 4th November 1982 Cats, repeat survey

34. 26th November 1982 Steaming

Comedy Theatre.

Nell Dunn.

Comedy. Award-winning comedy, by the author of Up the Junction, about a group of women fighting to save their local baths from closure.

35-36. 30th November and 1st December 1982

84 Charing Cross Road

Ambassador's Theatre.

James Roose-Evans, adapted from the book by Helene Hanff.

Modern drama. Hanff's account of her long-term postal relationship with the staff of Marks and Co., a Charing Cross Road book-sellers.

37. 15th December 1982 Noises off

Savoy Theatre.

Michael Frayn.

Comedy. The audience sees an incompetent theatre company performing both on and back-stage.

- 38-39. 23rd February and 1st June 1983 The Mousetrap
St. Martin's Theatre
Agatha Christie
Thriller. The West End's longest running play,
which celebrated its 30th year in 1982.
- 40-41. 16th June and 27th October 1983 Evita
Repeat surveys
- 42-43. 21st November and 28th December 1983 The Mousetrap,
repeat surveys
44. 29th December 1983 Evita, repeat survey
45. 18th May 1985 The Merce Cunningham Company
Sadler's Wells Theatre
Merce Cunningham
Dance. Programme of contemporary dance works by
American company, most choreographed by Cunningham,
one of the gurus of modern dance. The company performs
largely to music by John Cage.

46. 3rd June 1985 Me and My Girl

Adelphi Theatre

Noel Gay

Traditional musical. Revival of the 30's "Lambeth Walk" musical, about a cockney who turns out to be a long-lost earl. Robert Lindsay took the leading role.

47. 9th July 1985 Daisy Pulls it Off

Globe Theatre

Denise Deegan.

Comedy. Award-winning spoof of 20's girls' school stories.

48. 17th July 1985 Stepping Out

Duke of York's Theatre

Richard Harris

Comedy. Award-winning play about a evening class group learning tap-dancing.

49. 15th August 1985 On your Toes

Palace Theatre

Richard Rogers, Lorenz Hart and George Abbott.

Broadway transfer musical. Revival of 1936 musical renowned for marrying jazz and classical dance. Contains the Balanchine ballet "Slaughter on 10th Avenue".

50. 13th September 1985 The Business of Murder
Mayfair Theatre
Richard Harris
Thriller. Richard Todd played the lead in this long-running thriller which opened in 1981.
51. 28th September 1985 The Duchess of Malfi
National Theatre, Lyttelton Theatre
John Webster
Classical play. Production by the Ian McKellen and Edward Petherbridge company, one of five in residence at the NT in 1985, of what is probably the best known Jacobean play apart from the works of Shakespeare. Eleanor Bron played the title role.
52. 22nd October 1985 Daisy Pulls it Off
Repeat survey
53. 6th November 1985 Stepping Out
Repeat survey
54. 27th November 1985 Orpheus in the Underworld
London Coliseum
Offenbach
Opera. English National Opera production, an up-date of a well-known late 19th Century French comic opera. Designed by cartoonist Gerald Scarfe.

55. 17th December 1985 Daisy Pulls it Off
Repeat survey
56. 8th January 1986 Stepping Out
Repeat survey
57. 10th February 1986 The Scarlet Pimpernel
Her Majesty's Theatre
Baroness Orczy, adapted by Beverley Cross.
Children's/family show. Donald Sinden took the title role. The book is better known than the play. A transfer from Chichester Festival Theatre.
58. 21st February 1986 Torch Song Trilogy
Albery Theatre
Three plays by Harvey Fierstein
Modern drama. Supposedly largely autobiographical account of a homosexual drag queen's problems in making his relationships succeed, presenting a primarily light-hearted view. Sometimes described as a gay classic.
58. 13th March 1986 Lennon
Astoria
Bob Eaton, music by Lennon and McCartney
Modern musical. Dramatised biography of John Lennon.

60. 7th April 1986 42nd Street

Theatre Royal, Drury Lane

Based on the novel by Bradford Ropes. Music by Harry Warren, lyrics by Al Dubin, book by Michael Stewart and Mark Bramble.

Broadway transfer musical. A musical on the grand scale, with large production numbers. A company is staging a new musical, the understudy takes over at short notice, becomes an overnight star and saves the show. There is a 1930's film version.

61-64. 21st, 23rd, 26th April (matinee and evening)

Wife Begins at Forty

Ambassador's Theatre

Arne Sultan and Earl Barrett

Comedy. Mid-life crisis in a marriage, given a largely farcical treatment.

APPENDIX 5

Copies of all versions of the questionnaire used in
the research

Please tick only one answer to each question, unless asked to tick as many as apply. Where asked to specify, please write your answer in the space provided.

1 Where do you live? (Students term-time address)

GLC area Elsewhere in UK

Outside GLC, but within 40 miles Overseas (please write in country) _____

2 What is your main reason for being in central London today?

Work or business Specifically to visit the theatre

Live in central London Other (please specify) _____

On holiday

On shopping trip

3 About how many times have you visited theatres IN LONDON in the last 12 months, excluding this performance?

None Three to six times

Once Seven to eleven times

Twice Twelve or more times

4 About how many times have you visited theatres OUTSIDE LONDON in the last 12 months?

None Three to six times

Once Seven to eleven times

Twice Twelve or more times

5 How many people (including yourself) are there in your party at this performance?

By myself Three to six

Two Seven to eleven

Twelve or more

6 How did you hear about this show?
Tick all which apply

Poster Display sign outside this theatre

Leaflet Theatre programme

London Theatre Guide Advertisement

7 This question to be answered by overseas visitors only

a Had you heard about this particular show before you arrived in Britain?

Yes No

b Was your ticket for this particular show booked before you arrived in Britain?

Yes No

8 What attracted you to this particular show?

Playwright Personal recommendation

Actors Someone else decided

Play itself Music No special reason

Reviews Theatre awards Other (please specify) _____

9 How was your ticket for this performance booked?

Part of an inclusive deal (eg with hotel/meal/travel)

At Leicester Square half-price ticket-booth

Through ticket agent in Britain

Through ticket agent overseas

Through your hotel Don't know

By post Other (please specify) _____

By phone

In person at the theatre without an earlier reservation

10 When was your ticket for this performance booked?

Within an hour of the performance

Today, but more than an hour before the performance

Before today, but less than a week ago

More than a week ago

Don't know

11 Is your ticket for this show a Standby ticket?

Yes No

12 How was your ticket for this performance paid for?

Cash Credit card

Cheque Part of inclusive deal

Don't know

13 Do you have any of the following credit cards?
Tick all which apply

Access/Mastercard Diners' Club

Barclaycard/Visa Other (please specify) _____

American Express Don't have credit card

14 Have you ever used a credit card to book or pay for theatre tickets excluding those bought for this performance?

Yes No

15 Have you heard previously of the Half-Price Ticket Booth in Leicester Square?

Yes No

b If yes, have you ever used the booth to purchase tickets, excluding those bought for this performance?

Yes No

16 What was your main method of travel to the theatre for this performance?

Hired coach Taxi

Bus Motorbike

Train Bicycle

Tube On foot

Car Other (please specify) _____

Please tick only one answer to each question, unless asked to tick as many as apply. Where asked to specify, please write your answer in the space provided.

1 Where do you live? (Students term-time address)

GLC area Elsewhere in UK
 Outside GLC, but within 40 miles Overseas (please write in country) _____

2 What is your main reason for being in central London today?

Work or business Specifically to visit the theatre
 Live in central London Other (please specify) _____
 On holiday
 On shopping trip

3 About how many times have you visited theatres IN LONDON in the last 12 months, excluding this performance?

None Three to six times
 Once Seven to eleven times
 Twice Twelve or more times

4 About how many times have you visited theatres OUTSIDE LONDON in the last 12 months?

None Three to six times
 Once Seven to eleven times
 Twice Twelve or more times

5 How many people (including yourself) are there in your party at this performance?

By myself Three to six
 Two Seven to eleven
 Twelve or more

6 How did you hear about this show?
Tick all which apply

Poster Display sign outside this theatre
 Leaflet
 London Theatre Guide Theatre programme advertisement

Card 1 Col 10 Col 20 Col 30 Col 40

For office use only

7 This question to be answered by overseas visitors only

a Had you heard about this particular show before you arrived in Britain?

Yes No
 Yes No

b Was your ticket for this particular show booked before you arrived in Britain?

Yes No

8 What attracted you to this particular show?

Playwright Personal recommendation
 Actors
 Play itself Someone else decided
 Music No special reason
 Reviews Other (please specify) _____
 Theatre awards

9 How was your ticket for this performance booked?

Part of an inclusive deal (eg with hotel/meal/travel)
 At Leicester Square half-price ticket-booth
 Through ticket agent in Britain
 Through ticket agent overseas
 Through your hotel Don't know
 By post Other (please specify) _____
 By phone
 In person at the theatre without an earlier reservation

Col 50 Col 60 Col 70 Col 80

For office use only

10 When was your ticket for this performance booked?

Within an hour of the performance
 Today, but more than an hour before the performance
 Before today, but less than a week ago
 More than a week ago
 Don't know

11 Is it a Standby ticket eg Student Standby?

Yes No

12 How was your ticket for this performance paid for?

Cash Credit card
 Cheque Part of inclusive deal
 Don't know

13 Do you have any of the following credit cards?
Tick all which apply

Access/Mastercard Diners' Club
 Barclaycard/Visa Other (please specify) _____
 American Express Don't have credit card

14 Have you ever used a credit card to book or pay for theatre tickets excluding those bought for this performance?

Yes No

15 Have you heard previously of the Half-Price Ticket Booth in Leicester Square?

Yes No

b If yes, have you ever used the booth to purchase tickets, excluding those bought for this performance?

Yes No

16 What was your main method of travel to the theatre for this performance?

Hired coach Taxi
 Bus Motorbike
 Train Bicycle
 Tube On foot
 Car Other (please specify) _____

Card 2 Col 10 Col 20 Col 30 Col 40

For office use only



HELP US HELP YOU

The theatre in which you are sitting tonight is a member of the Society of West End Theatre, which is conducting a major survey of theatre audiences. The results of the survey will help us improve all aspects of theatre-going in the West End.

Please help us by completing this questionnaire as fully as possible while you are in the theatre tonight. It only takes a few minutes and you may even win a prize!

The answers you give will be confidential, but if you would like to take part in the prize draw, you will need to provide us with your name and address at the end of the questionnaire.

The prize for the draw will be a pair of tickets for the next annual Laurence Olivier Theatre Awards. Visitors to London who may be unable to use the tickets will be offered the alternative of a book about London theatres plus a free subscription to the West End Theatre magazine.

Please hand your completed questionnaire to one of the survey assistants, who are wearing SURVEY shirts. They have pens available if you require one. Even if you do not have time to answer all the questions, we would still like to have your questionnaire back.

This survey is being conducted for the Society by the Department of Arts Policy and Management at City University.

Any correspondence should be directed to Penny Owens, SWET Marketing Office, Bedford Chambers, Covent Garden, London WC2.

THANK YOU FOR YOUR HELP

THE LONDON THEATRE. ACT ON IT.



JUST ONE OF
THE MANY ACTIVITIES
ORGANISED BY
THE SOCIETY OF
WEST END THEATRE

Other activities include:

WEST END THEATRE
GIFT TOKENS

THE HALF PRICE
TICKET BOOTH

THE WEST END THEATRE
MAGAZINE

THE LONDON
THEATRE GUIDE

THE STUDENT
AND SIXTH FORMER
STANDBY SCHEME

THE LAURENCE OLIVIER
AWARDS

THE SENIOR CITIZENS
MATINEE SCHEME

For further information please write to:

The Society of West End Theatre, Bedford Chambers,
The Piazza, Covent Garden, London WC2E 8HQ.

THE LONDON THEATRE.
ACT ON IT.

Petrol and parking £ _____
 Programmes, sweets, drinks bought inside theatre £ _____
 Sweets, drinks bought outside theatre £ _____
 Babysitting charges £ _____
 Accommodation (only if spent solely because of theatre visit) £ _____
 Anything not covered above £ _____
 Specify what spent on _____

18 Did you, or do you plan to, eat out in London on today's theatre visit?

- Have already eaten out
- Plan to eat out after the performance
- Have no plans to eat out in London today

19 When you are visiting the theatre in London, would you normally eat out in London before or after the performance?

- Would usually eat out before
- Would usually eat out afterwards
- Would not usually eat out

THE REMAINING QUESTIONS ARE FOR OVERSEAS VISITORS ONLY.

20 Is this your first visit to London within the last 12 months?

- Yes
- No

21 How important were London's theatres in persuading you to choose London for your trip abroad?

- Very important
- Quite important
- Not at all important

Please write in your name and address below if you would like to be included in the prize draw.

Name _____
 Address _____

Please tick here if you would like to be sent further information about London's theatres and details of how to join the West End Theatre mailing list

Please tick only one answer to each question, unless asked to tick all that apply. When asked to specify, please write your answer in the space provided.

1 Where do you live?

If in London, write in borough, elsewhere in Britain write in town, overseas write in country. Students please give term time address.

2 What is your main reason for being in Central London today?

- Work or business Came in specially to see this performance
- Live in Central London Shopping trip
- On holiday Other (please specify) _____

3 How many people (including yourself) are there in your party for this performance?

- By myself Seven to eleven
- Two Twelve to twenty
- Three to six Twenty one or more

4 About how many times have you visited theatres in London in the last 12 months? (excluding this visit)

- None Three to six times
- Once Seven to eleven times
- Twice Twelve to twenty times
- More than twenty times

5 How did you hear about this production? (tick all that apply)

- Poster Press advertisements other than listings
- Display outside theatre Review or article in the press
- Radio The "London Theatre Guide"
- Television Told by someone
- The "West End Theatre" magazine
- Leaflet Other (please specify) _____
- Classified listings in the press

6 What attracted you to this particular production?

- Playwright Theatre awards
- Actors or performers Recommended by someone else

- Play or production itself Someone else decided
- Music or composer Other (please specify) _____
- Good reviews

7 How was your ticket for this performance booked?

- Part of inclusive package eg. with hotel, meal, travel
- Leicester Square half price ticket booth

At the theatre:

- a in person at the box office
- b by phone to the box office
- c by post to the box office

From a ticket agency in Britain (please specify which)

- a in person at the ticket agency
- b by phone to the ticket agency
- c by post to the ticket agency
- From a ticket agency overseas
- Other (please specify) _____

8 How was your ticket for this performance paid for?

- Cash West End Theatre Tokens
- Cheque Credit card (please specify which) _____

9 When was your ticket for this performance booked?

- Today Earlier than today

10 Are you at present a full-time student or schoolpupil?

- Yes No

11 What is your age group?

- 18 or under 45-54
- 19-24 55-64
- 25-34 65 or over
- 35-44

12 Are you male or female?

- Male Female

13 Please list all those publications, if any, which you read for most issues

Daily papers _____

Sunday papers _____

Magazines and periodicals _____

14 What was your main method of travel to the theatre for this performance?

- Hired coach or minibus Taxi
- Bus Motorbike
- Train Bicycle
- Underground On foot
- Car

15 Do you have any difficulties with transport home after a show when you visit the theatre in London? Please state what these are and specify usual means of transport

16 Is there anything at all that puts you off going to the theatre in London? Please specify

As part of our future planning for the West End Theatres, we are trying to assess the economic impact of West End Theatres on other industries. Please help us by answering the questions about spending below, by giving the best estimate you can of the expenditure made by yourself and your party in connection with today's theatre visit.

17. Please give an estimate below of the total expenditure of your party directly related to your theatre visit.

- No. of people this expenditure relates to _____
- Amount spent on: _____
- Eating out/restaurant £ _____ (if eating afterwards give rough estimate)
- Public transport £ _____

APPENDIX 6

Overseas countries represented in the West End theatre audience between November 1981 and April 1986.

Andorra	Iraq	Spain
Angola	Israel	Sweden
Argentina	Italy	Switzerland
Australia	Japan	Syria
Austria	Kenya	Tanzania
Belgium	Kuwait	Thailand
Belize	Lebanon	United Arab Emirates
Botswana	Luxembourg	United States of America
Brazil	Malaysia	Venezuela
Brunei	Malta	Yugoslavia
Bulgaria	Mauritius	West Germany
Canada	Mexico	West Indies
Channel Islands	Morocco	Zambia
Colombia	Netherlands	Zimbabwe
Cyprus	New Zealand	
Denmark	Nigeria	
Eire	Norway	
Ethiopia	Oman	
Finland	Pakistan	
France	Peru	
Gibraltar	Philippines	
Greece	Poland	
Hong Kong	Portugal	
Hungary	Saudi Arabia	
Iceland	Singapore	
India	South Africa	

Examples of press reaction to the Libyan crisis in
April 1986, and its effect on West End theatres.

Article from the Daily Mail, May 20th, 1986.

Nightmare in West End as U.S. shuns British trips

By STEVE ABSALOM

LONDON'S West End theatres are being crippled by the absence of American tourists shunning Britain because they fear terrorism. Top producer Bill Kenwright, who currently has five shows on stage, said last night that he has lost more than £100,000 in four weeks as ticket sales have plummeted by 40 per cent.

And he blamed the missing Americans for his decision to axe the acclaimed musical *Judy* after only nine weeks. 'It's a nightmare,' said Mr Kenwright. 'It just needs one more attack or another Libya crisis and it will be all over for us.'

'The Americans are panicking. Some of my closest friends and colleagues from the U.S. expect to see a gun-toting terrorist on every street corner.'

Mr Kenwright, a former Coronation Street actor, said he originally tried to keep *Judy* running at the Strand by covering losses from his own pocket in the hope that Lesley Mackie, who stars as the late *Judy Garland*, would win an award for her performance.

'People will say I'm either very stupid or very brave but we would undoubtedly have been fighting on had it not been for the Libya crisis. I've lost a small fortune,' he added.

This is the time of year when U.S. tourists traditionally flock to London, filling hotels and snapping up about a third of theatre seats. But Libyan warnings that Americans abroad will be targets for attack, coupled with worries in the States over the effects in Europe of last month's Chernobyl nuclear disaster, have put paid to that.

Now West End producers are having to redirect their marketing toward the home market in a desperate attempt to plug the gap in sales.

The article is continued on the following page.

The crisis has already meant curtains for the farce *Wife Begins At Forty*, with an all-star cast including Dinsdale Landen and Liza Goddard at the Ambassadors.

It was due to have been recast in three weeks time but now producers, The Theatre of Comedy have decided to drop the show completely because of low bookings.

Howard Panter, producer of the musical *Mutiny*, starring David Essex, at the Piccadilly, said: 'Every show I

know about is suffering a substantial drop in bookings.'

Impresario Louis Benjamin of Stc Moss Theatres, which owns ten West End venues, called on producers to steady their nerves.

'I don't believe we should be feeling suicidal,' he added. 'If you put on quality shows, audiences will come and if they do not come from America they will come from elsewhere.'

Mr Benjamin said shows in his theatres, which include the music: 42nd Street at the Theatre Royal, Drury Lane and La Cage Aux Folles at the Palladium, were weathering the storm.

At Stratford-upon-Avon, home of the Royal Shakespeare Company and a popular destination for American tourists, the story of a drop in bookings is the same.

Sir Geoffrey Howe is spearheading a new campaign to woo back American tourists.

The Foreign Secretary, who visits Washington next week is anxious to get the word passed down from the White House that Britain is safe and that we should not be penalised for supporting the U.S raid on Libya last month.

The American boycott could cost Britain's tourist industry up to £50 million this year.

This article is reproduced by kind permission of the Daily Mail.

A further example press cutting is on the following page.

Article from Time Out, issue dated 11th - 17th June 1986.

YANKS STAY HOME



London hotels, tour operators, travel companies and theatres are cutting staff and services to compensate for a 30-40 per cent drop in the number of American tourists this year, 'a panic which has now become a fashion to cancel,' according to one major transatlantic operator.

Scaremongering by the US media about the danger of terrorist bombings is the chief factor in 'the dramatic downturn'. 'A bombing in Spain is being seen as a bombing in Europe,' said John Bolding of Insight International, one of the many big operators which have been forced to lay off staff. The lower dollar rate, making holidays here 60 per cent more expensive for Americans, and the recent spate of airline disasters have contributed to the US boycott of Britain, he said.

In London, major hotels like the Churchill and the InterContinental have made staff redundant and in some cases closed entire floors because of forward cancellations. Tour companies like Edwards and Edwards, the biggest in the capital specialising in trips to places like Stratford, Stonehenge and Canterbury, have had to organise a sales drive in the face of a 20 per cent drop in customers this summer. They blamed 'a world-wide fear of travelling' as much as the fear of being attacked as causes.

The situation in London's theatreland is reported to be 'bad', with bookings slipping by as much as 30 per cent after the Libyan bombing raids. And although the Society of West End Theatre was maintaining a brave official face while stressing that all their 49 members were open for business, cancellations are understood to have been heavy everywhere.

The entire range of tourism-orientated junkets, such as beefeater banquets,

souvenir shops, the big London department stores, and especially the guides — who experienced a bumper recruitment during last year's record number of US tourists — have been hit, with many going to the wall.

The only positive aspect of the fall in the number of tourists is that those who have dared to come to battle-scarred London are finding otherwise-packed and crowded excursions all the more pleasurable. 'I have spoken to people who have said how much they enjoyed going around the Tower of London when usually it's a nightmare of queues,' said Roger Holt, of the British Incoming Tour Operators Association.

His 70 members are now crossing their fingers that the latter half of the summer will see an improvement and are optimistic that PR stunts like Nancy Reagan's acceptance of the invitation to the Royal Wedding in July will give a desperately needed boost to trade.

Paul Charman

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APPENDIX 8

SWET leaflet giving times of last trains from
central London stations

Late trains from London
(station codes and notes at end of table)

TO	FROM	MON-FRI	SAT	Approx journey time (minutes)	NOTES
Leatherhead	V	2345	2345	44	
Leighton Buzzard	E	0030†	0010†	65	
Letchworth	KX	2355	2355	50	
Lewes	V	2359	2359	70	
Lingfield	V	2336	2336	46	
Liphook	W	2325	2325	68	
Longfield	V	2353	2353	39	
Luton	SP	0050†	0045†	41	Also calls at Leagrave, Filtwick
Maidenhead	P	2331	2331	46	
Maidstone East	V	2327	2327	65	(72 mins Saturdays)
Margate	V	2350	2350	99	
Meopham	V	2353	2353	43	
Merstham	V	2347	2347	32	
Milton Keynes	E	0030†	0010†	81	
Newbury	P	2310*	2335	62(SX)	*Change at Reading
Northampton	E	2352	2352	78	
Oakleigh Park	KX	0045†	0025†	15	
Orpington	CX	0102†	0102†	34	
Orpington	V	2340	2333	34	
Otford	V	2327	2327	47	
Oxford	P	2310	—	75	Change at Didcot Parkway
	P	—	2310 Until 26.12.87	110	Change at Reading and Didcot Parkway (bus from Didcot)
	P	—	2310 from 2.1.88	90	Change at Didcot Parkway
Oxshott	W	2342	2342	30	
Oxted	V	2336	2336	37	
Paddock Wood	CX	2325	2325	47	
Pangbourne	P	2345	2355	42(SX)	Change at Reading
Petersfield	W	2325	2325	80	
Petts Wood	CX	0102†	0102†	31	
Petts Wood	V	2340	2333	30	
Portsmouth	W	2325	2325	105	
Potters Bar	KX	0045†	0045†	25	
Preston Park	V	2320	2320	71	
Princes Risborough	M	2355	2355	66	
Purley	V	2347	2347	24	
Purley	CX	2340	2340	39	
Reading	P	2345	2355	23(SX)	
Redhill	V	2347	2347	38	
Reigate	V	2247	2247	44	Change at Redhill
Richmond	W	0016†	0016†	17	
Riddlesdown	V	2336	2336	26	
Robertsbridge	CX	2325	2325	78	Change at Tonbridge
Romford	L	0032†	0032†	20	Also calls at Ilford
Royston	KX	2355	2355	67	
St Albans City	SP	0050†	0045†	29	Also calls at Hendon, Radlett and Elstree
St Leonard's (WS)	CX	2325	2325	98	Change at Tonbridge

← continued over

Late trains from London
until 14 May 1988

The following trains are suggested as suitable late or last departures from London. Please check before commencing your journey.

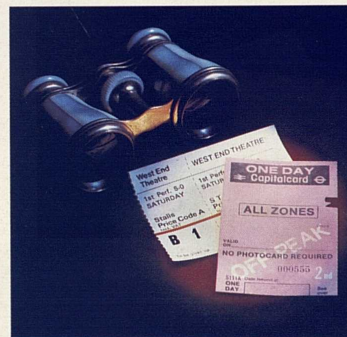
(station codes and notes at end of table)

TO	FROM	MON-FRI	SAT	Approx journey time (minutes)	NOTES
Abbey Wood	CX	0013†	0013†	30	
Aldershot	W	2345	2345	49	Change at Woking
Alton	W	2312	2312	69	
Ascot	W	2315	2315	43	
Ashford (Kent)	CX	2325	2325	73	
Ashted	W	2352	2352	40	
Aylesbury	M	2355	2355	80	Also 0004 from Baker St. (Change at Amersham)
Baldock	KX	2355	2355	50	
Banstead	V	2301	2301	50	
Basildon	L	0030†	0035†	40	Depart from Fenchurch St. on Saturdays
Basingstoke	W	2345	2345	55	
Beaconsfield	M	2355	2355	45	
Bedford	SP	0050†	0045†	66	
Bexleyheath	CX	2333	2333	34	
Billericay	L	0024†	0024†	45	
Bishops Cleeve	L	0035†	0035†	45	
Bournemouth	W	2345	2345	131	Also calls at Brockenhurst, New Milton, Christchurch
Bracknell	W	2315	2315	57	Change at Staines
Brentwood	L	0024†	0024†	35	
Brighton	V	2359	2359	65	
Brockenhurst	W	2345	2345	110	
Bromley South	V	0029†	0029†	20	Also calls at Herne Hill, Penge East, Beckenham Junction
Broxbourne	L	0035†	0035†	25	
Burgess Hill	V	2320	2320	60	
Camberley	W	2315	2315	55	
Cambridge	L	0035†	0035†	80	
Canterbury East	V	2350	2350	84	Change at Faversham
Caterham	CX	2340	2340	51	
Chatham	V	2353	2353	58	Also calls Swanley, Rochester
	CX	0013†	0013†	69	Also calls at Rochester.
Cheam	V	2345	2345	29	
Chelmsford	L	0024†	2302	51	
Chichester	V	2220	2220	107	
Chingford	L	0031†	0031†	25	
Chislehurst	CX	0102†	0102†	28	
Clandon	W	2342	2342	44	
Colchester	L	2359	2302	80	
Coulsdon South	V	2347	2347	27	
Crawley	V	2347	2347	57	
Dartford	CX	0013†	0013†	42	Also calls at Woolwich Arsenal and Abbey Wood
Denham	M	2355	2355	28	

← continued over



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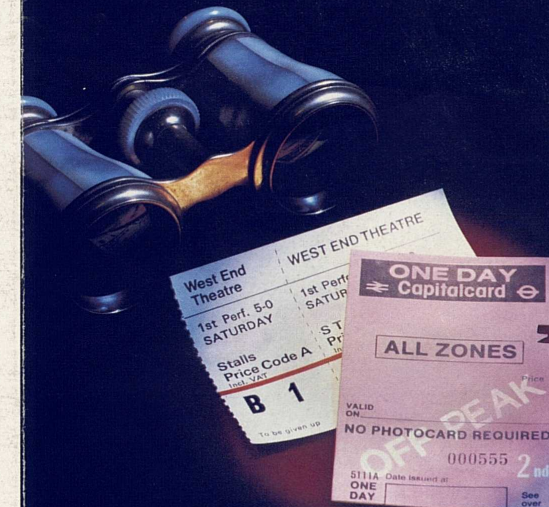
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**SPOTLIGHT YOUR
LATE TRAIN HOME
FROM THE THEATRE.**

5 OCTOBER 1987 – 14 MAY 1988



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This leaflet comes to you with the compliments of Network SouthEast and the Society of West End Theatre, to spotlight your late trains home after the show.

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- * For Prestel users, page 26980 not only contains the Guide but also a magazine highlighting current theatre events and services.

- * On Oracle page 232.

- * Daily in The Independent and each Sunday in The Observer Review.

And now with the late night train information shown in this leaflet, you can enjoy your evening and be assured of getting back home.

These are just some of the activities organised by The Society. For more information, write to: The Society of West End Theatre, Bedford Chambers, The Piazza, Covent Garden, London WC2E 8HQ.

Late trains from London
(station codes and notes at end of table)

TO	FROM	MON-FRI	SAT	Approx journey time (minutes)	NOTES
Didcot Parkway	P	2345	2310*	42(SX)	*Change at Reading until 19 December
Dorking	W	2322	2322	46	
Dorking	V	2345	2345	52	
Eastbourne	V	2359	2359	88	
East Croydon	V	0042†	0042†	24	
East Croydon	CX	2340	2340	31	
East Grinstead	V	2336	2336	57	
Edenbridge Town	V	2236	2236	47	Change at Oxted
Effingham Junction	W	2352	2352	49	
Egham	W	2346	2346	41	
Epsom	W	2352	2352	30	
Epsom	V	2345	2345	35	
Farnborough (Main)	W	2345	2345	38	
Farnham	W	2345	2345	55	Change at Woking
Faversham	V	2350	2350	69	
Fleet	W	2345	2345	43	
Folkestone Central	CX	2325	2325	95	
Gerrards Cross	M	2355	2355	36	
Gidea Park	L	0032†	0032†	25	
Gillingham (Kent)	V	2353	2353	61	
Gillingham (Kent)	CX	0013†	0013†	72	
Godalming	W	2325	2325	49	
Goring & Streatley	P	2345	2355	48(SX)	Change at Reading
Gravesend	CX	0013†	0013†	54	
Great Missenden	BS	0004†	0004†	50	Change at Amersham
Guildford	W	0002†	0002†	56	
Hadley Wood	KX	0045†	0025†	20	
Harlow Town	L	0035†	0035†	33	
Harpenden	SP	0050†	0045†	35	
Haslemere	W	2325	2325	63	
Hassocks	V	2320	2320	64	
Hastings	CX	2325	2325	99	Change at Tonbridge
Hatfield	KX	0045†	0025†	33	
Havant	W	2325	2325	95	
Hayes (Kent)	CX	2353	2353	37	
Haywards Heath	V	2359	2359	51	
Hemel Hempstead	E	0030†	0010†	45	Also calls at Berkhamsted and Tring
Herne Bay	V	2350	2350	83	
Hertford East	L	2315	2319	60	
Hertford North	KX	0048†	0028†	45	
High Wycombe	M	2355	2355	52	
Hitchin	KX	2355	2355	50	
Horley	V	2347	2347	44	
Horsham	V	2347	2347	69	
Horsley	W	2342	2342	40	
Hove	V	2359	2359	72	Change at Haywards Heath
Huntingdon	KX	2338	2338	70	
Kingston	W	0040†	0050†	25	
Leatherhead	W	2352	2352	40	

Late trains from London
(station codes and notes at end of table)

TO	FROM	MON-FRI	SAT	Approx journey time (minutes)	NOTES
Sawbridgeworth	L	0035†	0035†	40	
Sevenoaks	CX	2338	2338	53	
Shenfield	L	0032†	0032†	30	
Shepperton	W	2346	2346	45	
Shoeburyness	L	0030†	0035†	70	Depart from Fenchurch St. on Saturdays
Slough	P	2331	2331	30	
Southampton	W	2345	2345	93	
Southampton Parkway	W	2345	2345	85	
Southend Central	L	0030†	0035†	60	Also calls at Benfleet, Leigh-on-Sea, Westcliff. Depart from Fenchurch St. on Saturdays
Southend Victoria	L	0024†	0024†	70	Also calls at Wickford, Rayleigh, Hockley, Rochford
Staines	W	2346	2346	36	
Stevenage	KX	0045†	0025†	40	
Stoneleigh	W	2352	2352	23	
Sunningdale	W	2315	2315	48	Change at Staines
Surbiton	W	0002†	0002†	19	
Sutton	V	2345	2345	26	
Taplow	P	2331	2331	41	
Tattenham Corner	V	2336	2336	61	Change East Croydon
Thames Ditton	W	2326	2326	30	
Three Bridges	V	2347	2347	48	
Tonbridge	CX	2338	2338	63	
Tunbridge Wells	CX	2325	2325	54	Change at Tonbridge
Twyford	P	2331	2331	55	
Virginia Water	W	2346	2346	47	
Wadhurst	CX	2325	2325	63	Change at Tonbridge
Walton-on-Thames	W	0002†	0002†	29	
Watford Junction	E	0030†	0010†	29	
Welling	CX	2333	2333	31	
Welwyn Garden City	KX	0045†	0025†	25	
Wendover	BS	0004†	0004†	57	Change at Amersham
West Byfleet	W	0002†	0002†	39	
Westgate-on-Sea	V	2320	2320	95	
West Wickham	CX	2353	2353	34	
Weybridge	W	0002†	0002†	33	
Wimbledon	W	0040†	0050†	14	
Winchester	W	2345	2345	75	
Winchfield	W	2312	2312	53	
Windsor & Eton Riverside	W	2316	2316	56	
Witham	L	2359	2302	50	
Woking	W	0002†	0002†	43	
Wokingham	W	2315	2315	62	Change at Staines
Worthing	V	2359	2359	89	Change at Haywards Heath

STATION CODES AND NOTES

† Next day	E Euston	P Paddington
SX Except Saturdays	KX Kings Cross	SP St Pancras
BS Baker St (L.T.)	L Liverpool Street	V Victoria
CX Charing Cross	M Marylebone	W Waterloo

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APPENDIX 9

Ticket agencies, travel agents and department stores specified by respondents in 1985/86 as booking outlets used to obtain tickets for the performance surveyed.

Ticket agencies

Abbey Agency

Adams Agency

Albemarle Agency

Benfleet Agency

Fenchurch Agency

First Call

Keith Prowse

Lacon and Olier

Lashmar Agency

Leader Agency

London Theatre Bookings

Premier Agency

Renown Agency

Theatre Goers

Ticketmaster

Tickets of Bath

Ticketron

Travel agents

Edwards and Edwards

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Rakes

Department Stores

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APPENDIX 10

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Stratford-upon-Avon, Theatre Museum,
Covent Garden and the Leicester Square
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* Also available from all Post Offices in the
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December 7-20 1987

LONDON Theatre GUIDE

Published by
The Society of West End Theatre

THE LONDON THEATRE. ACT ON IT.



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- HMV Oxford Circus, 150 Oxford Street, London W1
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Other London Theatres

Ashcroft Theatre, Croydon Tel 688 9291 cc 680 5955
December 16-January 23

Jack and the Beanstalk
Starring Terry Scott, Jean Boht, Reginald Marsh, Diane Solomon
For performance times and prices please contact the Box Office

Bloomsbury Theatre, Gordon Street, WC1. Tel 387 9629
From December 9 **Sinbad** A spectacular Christmas Show
Contact Box Office for details
December 20-23 at 8.00 **The Fairer Sex** in concert
Tickets £5.00, Concessions £3.50

Churchill Theatre, Bromley (18 mins Victoria) Tel 460 6677
From December 14 **Mother Goose**
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The spectacular family pantomime
Full details and performance times: ring Box Office

Lyric Hammersmith, King Street, W6. Tel 01-741 2311
Until Jan 30 (Main House) **Lyle** by Charles Strouse (author of Annie)
a new family musical. Until Dec 12 ATC in **Faustus** (Studio)
From Dec 15 **The Froggits** (Studio)

Excellent musicians, beguiling stand-up comics' The Guardian (Studio)
Richmond Theatre, (15 mins Waterloo) Tel 940 0088 cc 240 7200
From December 11: **Alladin** spectacular pantomime for all the family
Starring: Anita Dobson, Jeffrey Holland, Simon Groom, Janet Ellis,
Duncan Goodhew, Anna Dawson and John Bouter.
Prices: £3.50, £9.00

Shaw Theatre, 100 Euston Road, NW1. Tel 388 1394 cc 387 6293
Until January 2 at 2.30 and 7.00 daily

Cinderella starring SUZI QUATRO
Stars, songs, thrills and festive fun in this traditional family pantomime

St. Georges Theatre, Tufnell Park Rd. N7. Tel 607 1128 (e Tufnell Pk./Holloway Rd)
December 18-January 9. Twice daily at 3 pm and 7 pm

Oscar In The Underworld A spectacular Christmas Show
by Grant Cathro of Thames TV's T-BAG series
Prices: £3.50-£4.50 and special £10 family ticket. Ring Box Office for details

Theatre Museum, Russell Street, Covent Garden (e Covent Garden)
Tel 836 2330, cc 240 7200 (+ fee)
Dec 8-13 at 6.30 **A Singular Muse** — the dancer as soloist.
Prices: £3.50 (Concs £2.50). Dec 15-20 **Frank Mumford Puppets**
Times: 1.00, 3.00 and 5.00 — no extra charge.

Wimbledon Theatre, The Broadway, SW19. Tel 540 0362 (240 7200*)
December 19-February 7 Traditional family pantomime

Robinson Crusoe starring Dennis Waterman, Rula Lenska, Colin Baker, Sam Kelly and Jan Leeming
For performance times and prices contact the Box Office

Young Vic, The Cut, SE1 (e Waterloo) Tel 928 6363
December 8-January 16 Ken Campbell's
Outbreak of God in Area 9
Mon-Sat at 7.30

No performances December 21-28 inclusive of January 1st



HOW TO BOOK YOUR THEATRE TICKETS

* Go directly to the Theatre Box Office — generally open from 10.00am until after the evening performance has started. Pay in cash, by credit card, cheque or West End Theatre Gift Tokens.

* Use your credit card — telephone the theatre direct quoting your number, immediately confirming your seats. You will need to produce your card when collecting the tickets. Theatres CC, booking numbers (and those of their approved agencies) are listed in this Guide.

* Telephone the box office — for information and bookings. Seats once reserved can be paid for either by post or in person, usually within 3 days.

* Write to the box office — enclosing a cheque, postal order or West End Theatre Gift Token (+ s.a.c.), giving alternative dates if possible.

* Via a ticket agency in London and other large cities. Many shows are on offer but agencies usually charge an additional booking fee on top of the normal seat price, always check.

* **THE LEICESTER SQUARE HALF-PRICE TICKET BOOTH**
Sells tickets for many West End productions to personal callers on the day of performance for half-price (cash only) plus £1.00 service charge. It is open from 12.00 noon for matinees and between 2.30pm and 6.30pm for evening performances Mon-Sat.

— THE LONDON THEATRE ACT ON IT —



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Dinner: 6.00-11.30pm



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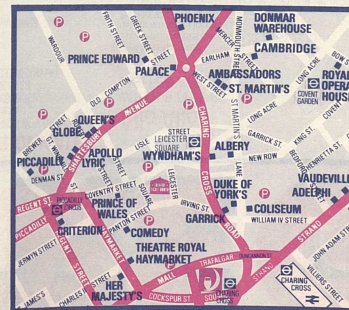
Bus and underground services continue until very late in the evening after which the night bus service takes over. Departures from Trafalgar Square. For more information visit any London Regional Transport travel information centre or call 01-222 1234 (24 hr).

Network SouthEast trains run during the late evening to most destinations. Many stations offer off street parking. A leaflet is available from all Network SouthEast stations, British Rail travel centres, West End Theatres or from The Society of West End Theatres, Bedford Chambers, Covent Garden Piazza, London WC2E 8HQ.

Parking: You can in some cases book a discounted parking space at the same time as your theatre ticket. This service is operated by those theatres with (P) following the relevant telephone numbers in the listings section overleaf.

Coach Operators: For advice on all aspects of coach parking contact the Metropolitan Police Coach Advisory Service, Tintagel House, Albert Embankment, London SE1 (01-230 5332).

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December 7-20 1987

INFORMATION KEY

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Theatre with sound amplification systems for the hearing. Please notify Box Office when booking if you want to use the system.
R: Royal patron theatre.
P: Patron theatre.
C: Closed theatre.
M: Matinee theatre.
E: Evening theatre.
CC: Credit Card bookings and season tickets only.
CP: Car parking can also be booked on these numbers.
24: Indicates 24-hour 7-day service.
N: Nearest Underground Station.
(000 0000) Numbers within brackets indicate Agents credit card numbers which a booking fee will be charged.
Theatres which have unreserved access, wheelchair spaces in the auditorium and adapted theatres on site. Many West End Theatres (where access conditions are not clear) will also be able to accommodate people using wheelchairs. For further information on facilities for the disabled, please contact the Society of West End Theatres (LTO), Bedford Chambers, The Piazza, Covent Garden, London WC2E 9JQ. Tickets for disabled and wheelchair users available on request. All theatres and money orders should be made payable to: WEST END THEATRE MANAGERS LTD.

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24 Hour 020 7630 8899
Private Bookings Fax 033804
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CAMBRIDGE

Earlham Street, WC2E 9JQ
See Map Detail
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Group Sales 020 7209 0202
Agents CC 240 7200/741 9999
(03) 444444

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11 North Row, WC2N 4AA
See Map Detail
Box Office 020 7463 7558
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(03) 444444

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Box Office 020 7930 8899
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COVENT GARDEN ROYAL OPERA HOUSE

WC2E 9JQ
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(03) 444444

CRITERION

Adelphi, WC2E 9JQ
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Agents CC 11 9999/240 7200
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DONMAR WAREHOUSE

Earlham Street, Covent Garden
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DRURY LANE

Theatre Royal, Catherine Street
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DURRY LANE

Theatre Royal, Catherine Street
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FORTUNE

Russell Street, WC2E 9JQ
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GARRICK

Theatre Royal, Haymarket
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GLOBE

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ONE FOR THE ROAD

By One by WILLY RUSSELL
with MICHAEL ANGUS, ELIZABETH BENNETT,
and WILLIAM GUNDEL
Directed by WILLIAM GUNDEL
Mon-Fri 7.30, Sat 8.00 and 8.00, Mat 4.00
Tue-Fri 11.15, Sat 11.15, Sun 11.15
Dec 16, 19, 20, 23, 26, 27, 30, 31
Dec 16, 19, 20, 23, 26, 27, 30, 31
Phone: 020 7463 7558

THE BUSINESS OF MURDER

By RICHARD TODD, DOUGLAS FIELDING, and SANDRA PRINE
with RICHARD TODD, DOUGLAS FIELDING, and SANDRA PRINE
Directed by RICHARD TODD
Mon-Fri 7.30, Sat 8.00 and 8.00, Mat 4.00
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SOOTY'S CHRISTMAS SHOW

With Sooty, Sweep and Goby
and MATHY COBBETT
December 14 January 7
Tue-Fri 7.30 and 8.00, Sat 8.00 and 8.00
Wed-Fri 11.15, Sat 11.15, Sun 11.15
Dec 16, 19, 20, 23, 26, 27, 30, 31
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SARCOPHAGUS

The Chomby play by
JERRY RUBIN
LINDA THOMPSON, GUY DUNN, and
ROD DWIGGERS
Directed by JERRY RUBIN
Mon-Fri 7.30, Sat 8.00 and 8.00, Mat 4.00
Tue-Fri 11.15, Sat 11.15, Sun 11.15
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THE ROVER

By ARTHUR BROWN
with ARTHUR BROWN, GUY DUNN, and
ROD DWIGGERS
Directed by ARTHUR BROWN
Mon-Fri 7.30, Sat 8.00 and 8.00, Mat 4.00
Tue-Fri 11.15, Sat 11.15, Sun 11.15
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