



NYC ARTS AUDIENCES

Attendance at NYC Cultural Venues

2005

We are grateful for the cooperation of the directors and staff of the cultural organizations throughout New York City who supplied information for this survey. In many cases, they also agreed to be interviewed to help the research team understand the complexity of measuring attendance in a standardized way in New York City.

This study was made possible by the generous support of the American Express Foundation, Mary Beth Salerno, Vice President. The Alliance's research activities are supported in part by the City of New York, Michael R. Bloomberg, Mayor, and Gifford Miller, Speaker, New York City Council, through the Department of Cultural Affairs, Kate D. Levin, Commissioner.

Alliance for the Arts

Randall Bourscheidt, President
Anne Coates, Vice President
Catherine Lanier, Director of Research
Johanna Arendt, Research Associate
Fern Glazer, Editor
Stephanie Margolin, Publications Manager
Sara Loughlin, Designer

330 West 42nd Street, Suite 1701
New York, NY 10036
(212) 947-6340
Fax: (212) 947-6416
www.allianceforarts.org

Board of Trustees

Paul Beirne, *Chairman*. Randall Bourscheidt, *President*. Anita Contini, Karen Gifford, Fiona Howe Rudin, J. P. Versace, Jr., *Vice Chairmen*; William Smith, *Treasurer*. Laurie Beckelman, Raoul Bhavnani Linda Boff, John Breglio, Kevin R. Brine, Theodore Chapin, Robert Clauser, Charles Cowles, James H. Duffy, Heather Espinosa, Paul Gunther, Ashton Hawkins, Patricia C. Jones, Eric Lee, Robert Marx Richard Mishaan, Richard Mittenthal, Alexandra Munroe, Joseph J. Nicholson, Marc Porter, Betty A. Prashker, Susan Ralston, Justin Rockefeller, Jerry Scally, Frances Schultz, Andrew Solomon
Paul Washington, Tim Zagat

INTRODUCTION

This report is based on the first study of the audience for nonprofit cultural activity in New York City. This simple fact—that no previous study has collected the attendance data of a large sample of cultural organizations—reflects the lack of any centralized data-collection system in the fragmented arts community.

The findings of our study, including the impressive figure of 25.6 million attendees at cultural events and institutions, establish a baseline for future research. They are central to a new project of the Alliance for the Arts to collect data on all aspects of the nonprofit cultural life of the city. As the originator of research into the economic impact of the arts and income patterns for nonprofit cultural groups, the Alliance will now extend its research into audience size and composition.

Economic impact has been central to the argument for support of the arts and will continue to be. Likewise, understanding the vicissitudes of income for nonprofit cultural organizations helps us see their vulnerability as an industry.

The large audience these organizations attract and serve tells us an equally important part of their story, getting to their essential purpose and mission, which is to add to the quality of life and educational enrichment of New Yorkers as well as attracting visitors to the city.

An audience of nearly 26 million people—more than twice that of the Broadway theater or live sports attendance—demonstrates the enormous popular success of this sector. Nothing can demonstrate more strongly to public officials and private funders the importance the arts have in the lives of New Yorkers or the depth of support the people of this city provide for cultural organizations in the most fundamental way: by going.

This study provides a snapshot of one year—2004 only—and does not reveal trends in attendance. By repeating the study every year, we will be able to track changes in attendance and begin to understand more about the audience.

Understanding audience composition is a challenge to an industry which is not only fragmented, large and diverse, but which is often reluctant to share information publicly about its audience. By looking at aggregate numbers, our research will not reveal the confidential information concerning any single organization but will help the entire field understand how they are faring as an industry. We found that only a few organizations collect demographic data, so we were hampered in attempting to understand the relative proportions of local audience members, regional attendees, and culturally motivated tourists. We hope to work with the cultural community to improve the extent and quality of demographic information gathered.

This survey was sent to 480 organizations; 138 responded, for a return rate of 29 percent. We thank all those groups that provided us with information and look forward to working with them and the entire field in the future for the benefit of all.

Randall Bourscheidt
President
Alliance for the Arts

MAJOR FINDINGS

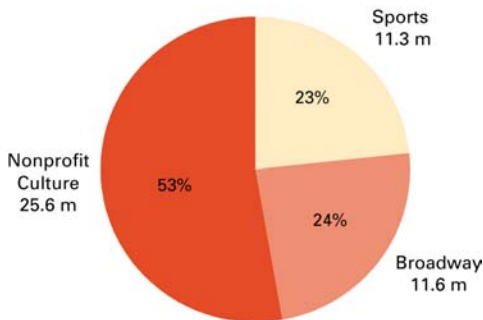
Information on attendance at nonprofit cultural attractions in New York City is surprisingly scarce. For all the acknowledged importance of the cultural sector in this city, we know very little about how many people are drawn to it, let alone the most basic information about them, such as where they reside. The Alliance for the Arts is taking a first step in developing a baseline of attendance data to fill this gap in our civic information. The findings of this audience survey pose important questions about the role that the arts play in our lives as New Yorkers and in the economy of the city.

Nonprofit cultural venues draw an audience of almost 26 million people—many more than the numbers going to Broadway theaters¹ and all live commercial sporting events in the city from Yankee Stadium to Aqueduct² combined.

Chart 1

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Live New York City Audiences



Source: Alliance for the Arts 2004

Most nonprofit arts organizations collect very little information about their visitors.

Nonprofit cultural organizations in New York City attract an enormously large audience. Our initial audience survey, in which 138 cultural organizations across the city participated, reveals that almost 26 million (25.6 million) people attended exhibitions and performances in 2004 in the city. This figure accounts for the great majority of the city's total nonprofit cultural audience. It does not include MoMA, since the new facility was just opening when the survey was fielded, and some other major venues and many

¹ League of American Theatres and Producers: Attendance at All Broadway Theaters, 2004 Season.

² NYC Sports Commission: NYC Attendance at Baseball, Football, Basketball, Tennis, Racing and Soccer Events, 2004.

smaller attractions that together draw a significant size audience did not return the questionnaire.³

This figure also reflects the decline in cultural and international tourism documented by NYC & Company.⁴

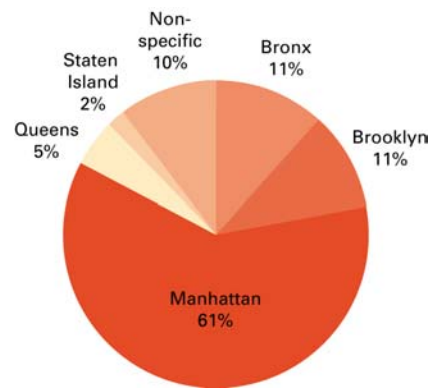
Location of Cultural Audiences

While most of the audience congregates around major venues in Manhattan, well over a third is spread throughout the other boroughs as the chart below indicates.⁵ This dispersion reflects the high visitation at the zoos and gardens in the Bronx, Brooklyn, Queens and Staten Island.

Chart 2

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Location of New York City Nonprofit Cultural Audiences



Source: Alliance for the Arts 2004

Cultural Audiences by Discipline

Museums, historic sites and galleries account for the majority (60 percent) of the cultural audience in New York City. Performing arts venues attract roughly one-quarter of the audience, followed closely by the city's zoos and gardens, with 17 percent of total audience.

³Organizations with large audiences that were not among the respondents include the Roundabout Theatre and the New York Philharmonic.

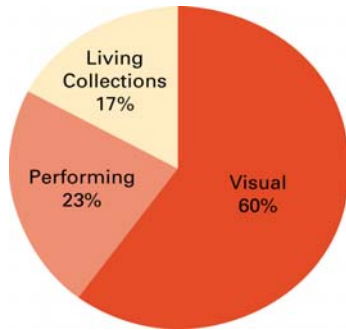
⁴There were 16.9 million "cultural tourists" (any visitor who comes from at least 50 miles outside the city or stays in the city overnight who includes cultural activities in his/her itinerary) in 2002, and 15.8 million cultural tourists in 2003. And while the number of domestic visitors has increased since 2000, the number of international visitors is still almost 1.5 million less than it was that year.

⁵The "Nonspecific" location includes the Statue of Liberty and organizations such as the Historic House Trust with multiple locations.

Chart 3

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

New York City Nonprofit Cultural Audiences



Source: Alliance for the Arts 2004

Counting Attendance

While organizations in this sector keep close track of the number of their visitors, only a minority regularly ask for any information at the gate or box office such as student status (48 percent), membership status (45 percent), zip code (44 percent) or point of origin (39 percent), and even fewer gather demographic information or consumption patterns. Fewer still conduct regular surveys.

The most common way in which the organizations surveyed count their attendance is through ticket sales. Seventy percent of the respondents track in this manner. Counters were also used by a sizable minority (30 percent), as was visual estimation (22 percent). About half the respondents compile this data weekly or more often. The other half compile their attendance figures less often, on a monthly (9 percent) or annual basis (17 percent) or irregularly, such as at the completion of a project or as needed for reports (28 percent).

The organizations surveyed classify their attendees by the following categories:

Category	Percent of Sample
Regular Attendance	70
Students	65
Members/Subscribers	50
Class/Workshop Participation	41
Special Exhibit/Event	37
Other (Seniors, Teachers, Groups, Sponsors, etc.)	32

The majority of organizations in this sample (80 percent) have gathered information on their audience for more than five years.

Information on audiences is most often gathered at the gate or box office (point of purchase) rather than through surveys. Information about attendees' membership status or student status is most frequently asked, followed by e-mail addresses, and then by information on the origin of attendees, either residence or zip code. Other demographic information such as ethnicity, age, gender, income or behavioral information, such as cultural consumption patterns, ancillary spending patterns, frequency of attendance or source of information about the cultural organization, were asked only infrequently. Table 1 shows the percentage of organizations responding that regularly gathered information about each characteristic of their audience either at the gate or box office or through surveys.

Table 1

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Information Gathered by Survey Respondents on Attendees Regularly Asked

Characteristic	At the Gate/Box Office	Through Surveys
More Frequently Asked		
E-mail address	45%	29%
Zip Code	44%	24%
Membership Status	45%	21%
Student Status	48%	16%
Residence	39%	23%
Less Frequently Asked		
Frequency of Attendance	26%	21%
Source of Information About Organization	21%	23%
Age	14%	21%
Gender	13%	21%
Ethnicity	8%	15%
Cultural Consumption Patterns	4%	15%
Income	2%	14%
Ancillary Spending Patterns	2%	7%

Source: Alliance for the Arts 2004

MAJOR FINDINGS

Not surprisingly, organizations keep closer track of point of origin information such as residence and zip code about their members, most frequently through analysis of member records. However, most do not compile basic demographic information even about their members and subscribers. Table 2 shows the percentage of organizations responding that regularly gathered information about each characteristic of their members and subscribers either through member records or surveys.

Table 2

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Information Gathered by Survey Respondents on Members/Subscribers Regularly Gathered

Characteristic	Through Member Records	Through Surveys
More Frequently Asked		
Residence	64%	17%
Zip Code	59%	19%
E-mail address	55%	15%
Less Frequently Asked		
Student Status	33%	13%
Frequency of Attendance	30%	15%
Gender	24%	15%
Source of Information About Organization	23%	14%
Age	12%	14%
Ethnicity	8%	14%
Income	10%	8%
Cultural Consumption Patterns	1%	12%
Ancillary Spending Patterns	0	10%

Source: Alliance for the Arts 2004

Heavily Attended Venues

Within the group reporting attendance of 26 million people, the 30 most heavily attended organizations account for 21.6 million attendees, or over 84 percent of the total captured in the survey results. These organizations with particularly heavy attendance are listed below ⁶:

- 92nd Street Y
- American Museum of Natural History
- Brooklyn Academy of Music
- Brooklyn Botanic Garden
- Brooklyn Children’s Museum
- Brooklyn Museum
- Carnegie Hall
- City Center
- Film Forum
- Frick Collection
- Solomon R. Guggenheim Museum
- Historic House Trust (21 Historic Houses)
- Lincoln Center Theater
- Metropolitan Museum of Art
- Metropolitan Opera
- Museum of Arts and Design
- National Museum of the American Indian—
Smithsonian Institution
- New York Botanical Garden
- New York City Ballet
- New York City Opera
- New York Hall of Science
- P.S. 1 Contemporary Art Center
- Public Theater
- Queens Botanical Garden
- Statue of Liberty National Monument
- Tribeca Film Institute
- Whitney Museum of American Art
- Wildlife Conservation Society—Bronx Zoo
- Wildlife Conservation Society—New York
Aquarium
- Young Audiences New York

These organizations are more likely than the broader sample to gather very basic information about their audience on a regular basis. Three-quarters of this group (73 percent) measures their audience by ticket sales, 30 percent use counters and a few (1 percent) use visual estimation. A majority (57 percent) compiles this information daily, and another 23 percent compile it weekly. The categories of attendees and the length of time that they have been gathering this information are very similar to the broader survey sample.

However, even among these heavily visited organizations, only a minority gathers descriptive information about their audience on a regular basis. Only 11 of these 30 organizations collect point of origin data—the information most valuable to understanding the link between culture and tourism—on a regular basis. These 11 should be studied to determine, in more detail, how they gather this information and how they use it.

⁶ 16 of this group are Cultural Institutions Groups; 27 are in the Alliance 100 (only Historic House Trust, Young Audiences New York and Film Forum are not Alliance 100 organizations).

Survey Sample

The sample was drawn from the Alliance’s NYC ARTS listings and was chosen to reflect the diversity of New York City cultural organizations in terms of budget size, attendance, discipline or subject matter. All organizations are destinations open to the public; virtually all receive public support from the city or state. Questionnaires were sent to 480 organizations and were received back from 138, for a response rate of 29 percent.⁷

The sample is fairly representative of the broader cultural community. The borough location of the organizations studied is very similar to the location pattern of cultural organizations as a whole. Exhibited arts and large organizations are disproportionately represented in the sample, but at the same time performing arts organizations and smaller organizations also responded in large enough numbers to yield usable findings.

Borough Location

The respondents are spread across the city in a pattern similar to that of the wider cultural community in New York City. About two-thirds of the respondents are located in Manhattan, 14 percent are in Brooklyn, 10 percent in Queens, 6 percent in the Bronx and 4 percent in Staten Island. As shown in Table 3, this geographic distribution is very close to that of grantees of New York City’s Department of Cultural Affairs. NYSCA’s grantees are somewhat more likely to be located in Manhattan, but otherwise follow a similar pattern.

Table 3

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Survey Sample by Borough

Borough	Audience Survey	DCA Grantees 1999	NYSCA Grantees 2004
Bronx	6%	7%	2.4%
Brooklyn	14%	12%	12.1%
Manhattan	66%	67%	78.1%
Queens	10%	10%	5.8%
Staten Island	4%	4%	1.6%

Source: Alliance for the Arts 2004

The audience survey sample contains a higher percentage of exhibited arts than do the DCA and

⁷ 24 out of the 34 organizations comprising the Cultural Institutions Group responded to this questionnaire.

NYSCA samples, as indicated in Table 4, but the performing arts are also very well represented.

Table 4

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Survey Sample by Disciplines

Discipline	Audience Survey	DCA Grantees 1999	NYSCA Grantees 2004
Visual and Living	45%	27%	32%
Performing	55%	73%	68%

Source: Alliance for the Arts 2004

Budget Size

The respondents to this survey are more likely to have large operating budgets than the broader universe of DCA-funded and NYSCA-funded organizations. This is the result of a deliberate effort to gather information on as many large organizations with high attendance as possible, while also developing information on the information gathering practices and attendance of smaller organizations.

Table 5

NYC ARTS AUDIENCES:
Attendance at NYC Cultural Venues

Survey Sample by Budget Size

Budget Size	Audience Survey	DCA Grantees 1999	NYSCA Grantees 2004
Over \$10m	20%	5%	4%
\$1m–\$10m	30%	21%	22%
\$100k–\$1m	35%	45%	45%
Under \$100k	15%	29%	29%

Source: Alliance for the Arts 2004

Measuring attendance at the city’s cultural venues is an important tool in evaluating the health of the nonprofit arts industry, as well as understanding culture’s role in the tourism industry. The Alliance intends to measure attendance regularly at a representative sample of cultural organizations, using attendance—and other indicators the Alliance has developed, such as income trends, economic impact, and capital construction projects and their impact—to take the pulse of the city’s nonprofit cultural organizations.

SURVEY RESPONDENTS

3 Legged Dog
52nd Street Project
92nd Street Y
Afrikan Poetry Theatre
Alpha-Omega Theatrical Dance Company
Amato Opera Theatre
American Museum of Natural History
American Opera Music Theatre Co.
American Tap Dance Foundation
Apexart
Art in General
Artists Space
Asia Society
AXA Gallery
Ballet Tech Foundation
Bard Graduate Center for Studies in the
Decorative Arts, Design and Culture
Battery Dance Company
Big Apple Circus
Big Onion Walking Tours
Blue Heron Theatre
Bread & Roses Cultural Project
Bronx Museum of the Arts
Bronx Opera Company
Bronx River Art Center
Brooklyn Academy of Music
Brooklyn Botanic Garden
Brooklyn Center for the Performing Arts
Brooklyn Children's Museum
Brooklyn Museum
Capoeira Foundation
Carnegie Hall
Cherry Lane Theatre
Chinese Theatre Works
Circle in the Square Theatre School
City Center
Colden Center for the Performing Arts at
Queens College
Conference House
Cooper-Hewitt National Design Museum—
Smithsonian Institution
Dance Giant Steps
Dance Theater Workshop
Doll and Toy Museum of NYC
Downtown Music Productions
Eldridge Street Project
En Foco
ENACT
Eva Dean Dance
Exit Art
Film Forum
Flamenco Vivo Carlota Santana
Folksbiene Yiddish Theater
Fraunces Tavern Museum
Frederick Douglass Creative Arts Center
Frick Collection
Gathering of Tribes
Solomon R. Guggenheim Museum
Historic House Trust
IFP/New York
Immigrants' Theatre Project
Irish Repertory Theatre
Jean Cocteau Repertory
Jewish Museum
Joyce Theater
Judaica Museum of The Hebrew Home for the
Aged at Riverdale
Juilliard School
Jupiter Symphony of New York
Kaye Playhouse at Hunter College
La MaMa Experimental Theatre Club
LaGuardia Performing Arts Center
Lehman College Art Gallery
Lincoln Center Theater
Location One
Manhattan Botanical Garden—Friends of
Pier 84
Ma-Yi Theater Company
Metropolitan Museum of Art
Metropolitan Opera
Miller Theatre
Museum of Arts and Design
Museum of Television & Radio
Museum of the City of New York
National Academy Museum
National Museum of the American Indian—
Smithsonian Institution
New Festival
New Group
New Museum of Contemporary Art
New Perspectives Theatre Company
New York Botanical Garden
New York City Ballet
New York City Opera
New York Gilbert & Sullivan Players
New York Hall of Science
New York School of Interior Design
New York Theater Ballet
New York Theatre Workshop
New-York Historical Society
Noguchi Museum
openhousenewyork
Orchestra of St. Luke's
P.S. 1 Contemporary Art Center
Paper Bag Players
Paul Taylor Dance Company
Performance Space 122
Primary Stages
Prospect Park Alliance
Public Art Fund
Public Theater
Puppetworks
Queens Botanical Garden
Queens Museum of Art
Queens Theatre in the Park
Readers Theatre Workshop/InCollaboration
Regina Opera Company, Inc.

SURVEY RESPONDENTS

Repertorio Español (Spanish Repertory Theatre Co.)
Russian American Cultural Center (RACC)
Sculpture Center
Second Stage Theatre
Shadow Box Theatre
Smack Mellon
Socrates Sculpture Park
SoHo Repertory Theatre
South Street Seaport Museum
St. Ann's Center for the Arts and Restoration
Staten Island Children's Museum
Staten Island Historical Society
Staten Island Institute of Arts & Sciences
Staten Island Zoological Society
Statue of Liberty National Monument
Statue of Liberty—Ellis Island Foundation
Sylvan Winds
TADA! Theater and Dance Alliance
Theater for the New City
Tribeca Film Institute
UrbanGlass
Weeksville Society
Whitney Museum of American Art
Wildlife Conservation Society—Bronx Zoo
Wildlife Conservation Society—New York Aquarium
Young Audiences New York
Young Playwrights