



# 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.

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## 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

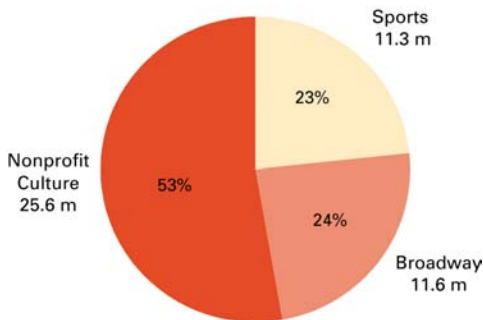
Information on attendance at nonprofit cultural attractions in New York City is surprisingly scarce. For all the acknowledged importance of the cultural sector in this city, we know very little about how many people are drawn to it, let alone the most basic information about them, such as where they 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 theaters<sup>1</sup> and all live commercial sporting events in the city from Yankee Stadium to Aqueduct<sup>2</sup> 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

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

<sup>2</sup> 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.<sup>3</sup>

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

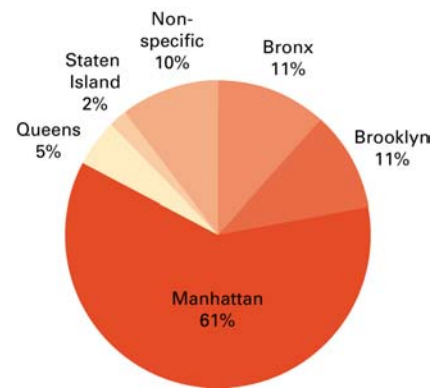
## Location of Cultural Audiences

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.<sup>5</sup> 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.

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

<sup>4</sup>There 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.

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



# 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
<b>More Frequently Asked</b>		
Residence	64%	17%
Zip Code	59%	19%
E-mail address	55%	15%
<b>Less Frequently Asked</b>		
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 <sup>6</sup>:

- 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.

<sup>6</sup> 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.<sup>7</sup>

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:  
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### 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

<sup>7</sup> 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:  
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### 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:  
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### 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