

2008 Survey of Theater and Musical Audiences

(based on 2007)

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Overview

1. Objective of the Survey

This survey seeks to develop a better understanding of elements related to the actual state of attendance of theatrical works and musicals, such as the number of audiences and relationship with those accompanying them. Moreover, it also assesses factors such as motivation, preferences, and elements deemed important when choosing a theatrical or musical performance to attend.

2. Survey Approach

The survey revealed that theater and musical audiences viewing frequency was relatively higher than that for other performing arts genres. As part of the survey, regular theater and musical spectators over the age of 16 and the members of performing arts clubs with an active level of performance viewing were canvassed. Survey methods included actual site visits and an online survey.

Table 1-1 Survey Method

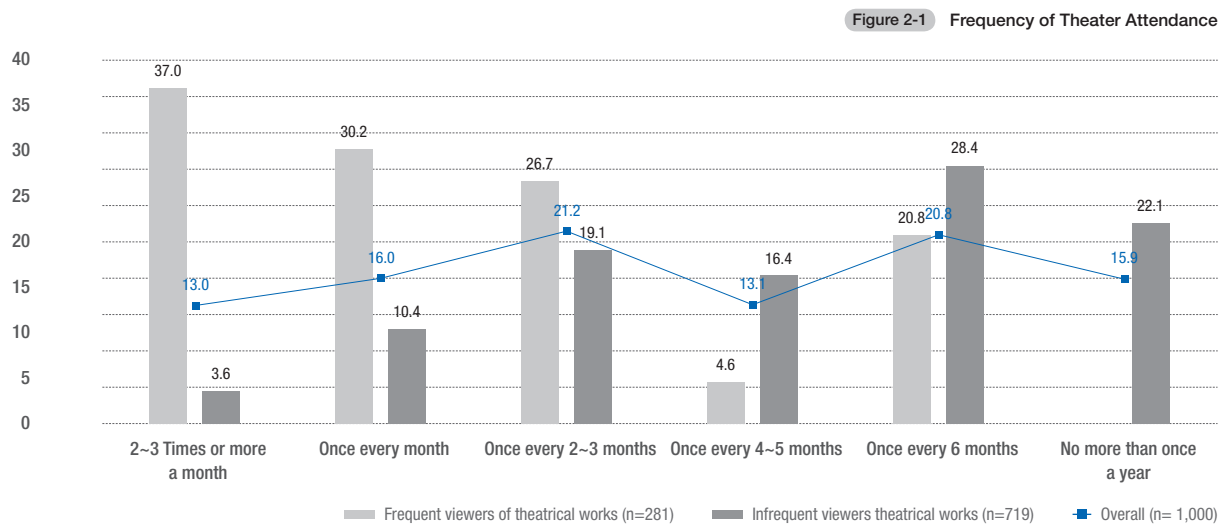
	Survey of Theater / Musical Spectators	Survey of the Members of Performing Arts Clubs	
Target	Theater / Musical spectators over the age of 16 from the Seoul and Gyeonggi area.	Members of performing arts (theater / musical) clubs	
Approaches	Theatrical / Musical performance lists during the survey period (September–October)	Performing arts club lists on the major portal sites	
Sampling Method	Purposive allocation sampling	Random sampling	
Survey Method and Effective Sample Size		Theater	Musical
	Actual site visits	350	350
	Online survey of spectators	500	500
	Online survey of clubs	150	150
	Total number of samples	1000	1,000
	* The online survey with spectators was implemented after the actual site visits by each genre (theater / musical)		
Survey Period	Actual performance site visits: October 5–November 1, 2008 Online survey of clubs: October 23–November 3, 2008 Online survey of spectators: November 3–November 12, 2008		
Conducted by	NIKorea		

The Current State and Features of Theater and Musical Attendance

1. Frequency of Theater and Musical Attendance

1) Frequency of Theater Attendance

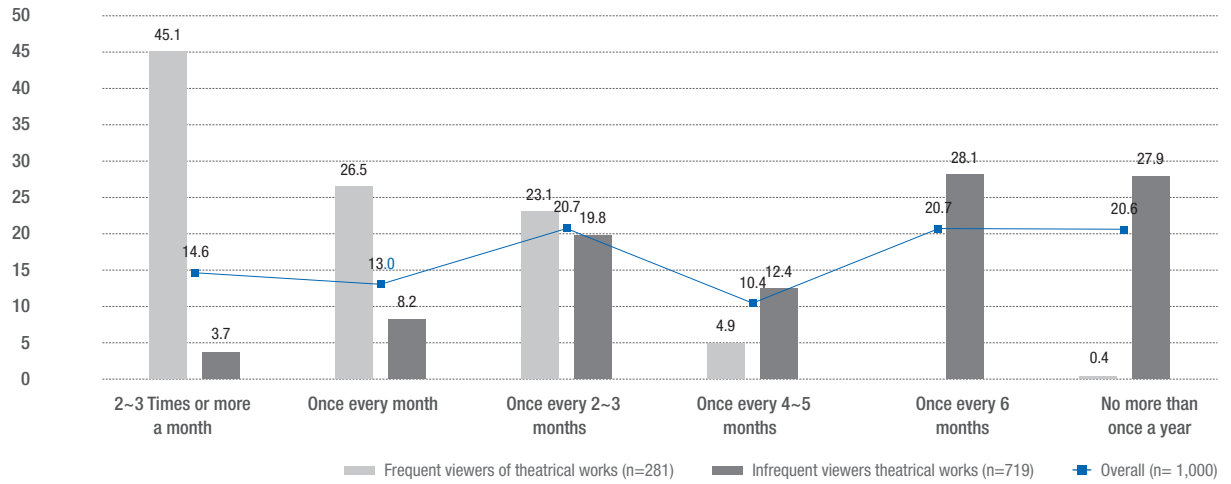
21.2% of those surveyed attested that they attended the theater once every 2~3 months (4~6 times per year) in 2007. The second most popular answer was once every 6 months (twice a year, 20.8%).



2) Frequency of Musical Attendance

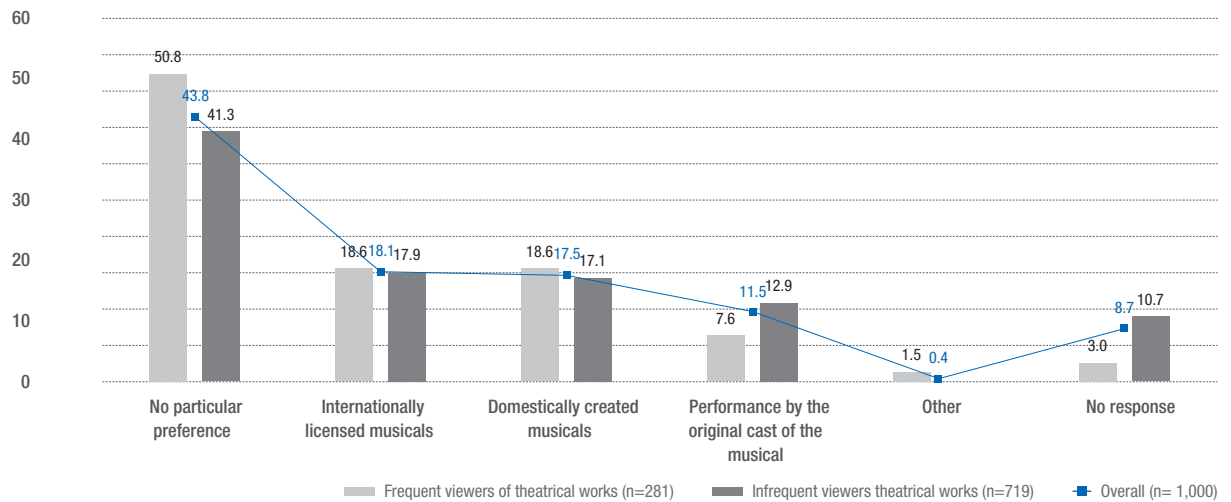
The most commonly given answers in terms of musical viewing frequency were once every 2~3 months (4~6 times per year) and once every six months (twice per year), with each answer garnering 20.7% of the overall total. The next most popular answer was 2~3 times a month, which earned 14.6% of the overall total.

Figure 2-2 Frequency of Musical Attendance



The most commonly given answers in terms of musical viewing frequency were once every 2-3 months (4-6 times per year) and once every six months (twice per year), with each answer garnering 20.7% of the overall total. The next most popular answer was 2-3 times a month, which earned 14.6% of the overall total.

Figure 2-3 Preferred Type of Musical Performance



2. Factors to Influence Theater and Musical Attendance

1) Motivation of Theater and Musical Audience

Both theater and musical patrons cited ‘the excitement and emotions that can only be experienced during live performances’ (4.21 points in the case of theatrical works and 4.29 points musicals) as their major motivation for viewing such works. This was followed by ‘refreshing oneself by escaping from everyday life’ (4.14 points in the case of theatrical works and 4.19 for musicals). All in all, emotional motivations were found to be relatively more pronounced. On the other hand, social purposes and ticket prices were only infrequently cited. Frequent patrons (4 or more times a year) identified the performance itself and energy it brought to one’s life as their motivation for viewing, and tended to grant high scores to the various viewing motivations surveyed.

Table 2-1 Motivation of Theater Audience

Motivations	Statement	Overall (n=1000)	Frequent Viewers (n=281)	Infrequent Viewers (n=719)
Emotional Motivations	I watch theatrical performances to refresh myself and escape from everyday life.	4.14	4.28	4.09
	There are certain feelings and emotions that can only be experienced during live performances.	4.21	4.37	4.15
	I enjoy theater performances as a whole.	4.03	4.34	3.91
	I unwind by watching theater.	3.91	4.01	3.87
Rational Motivations	Theater allows me to think about the problems in life in a profound manner.	3.74	3.92	3.66
	I watch theater because it allows me to secure various kinds of knowledge.	3.43	3.53	3.39
	I can understand others better through the characters in theatrical performances.	3.76	3.88	3.71
	Viewing theater helps me with my major or work.	2.85	2.89	2.84
	Theater performances help to heighten my cultural background.	3.76	3.85	3.72
	I can improve the quality of my life through theatrical performances.	3.78	3.91	3.73
Symbolic Motivations	People who frequently go to see theatrical performances are more refined.	3.01	2.93	3.04
	Those who are well-versed in the theater stand out from others.	3.08	3.09	3.07
	I go to the theater to further my standing within society.	2.42	2.28	2.48
	I go to see theatrical performances to commemorate special days.	3.42	3.22	3.50
Relational Motivations	The viewing of performances is one of the social tools used to deepen relationships and friendships with colleagues and friends.	3.40	3.42	3.39
	Theater allows me to broaden social networks with friends and acquaintances.	3.42	3.53	3.38
	I go to see theatrical performances because the cost is relatively low (or is free).	2.92	3.00	2.88

(unit: points)

Table 2-2 Motivation of Musical Audience

Motivations	Statement	Overall (n=1000)	Frequent Viewers (n=264)	Infrequent Viewers (n=736)
Emotional Motivations	I watch musical performances to refresh myself and escape from everyday life.	4.19	4.46	4.10
	There are certain feelings and emotions that can only be experienced during live performances.	4.29	4.59	4.18
	I enjoy musical performances as a whole.	4.11	4.58	3.94
	I unwind by watching a musical.	3.98	4.37	3.84
Rational Motivations	Musicals allow me to think about the problems in life in a profound manner.	3.61	3.71	3.57
	I watch musicals because it allows me to secure various kinds of knowledge.	3.45	3.48	3.44
	I can understand others better through the characters in musicals.	3.69	3.83	3.64
	Viewing musicals helps me with my major or work.	2.87	2.87	2.87
	Musical performances help to heighten my cultural background.	3.80	3.82	3.80
	I can improve the quality of my life through musicals.	3.86	3.94	3.83
Symbolic Motivations	People who frequently go to see musicals appear more refined.	3.06	2.88	3.13
	Those who are well-versed in musicals stand out from others.	3.07	2.92	3.13
	I go to musicals to further my standing within society.	2.42	2.07	2.54
	I go to see musicals to commemorate special days.	3.39	3.07	3.50
Relational Motivations	The viewing of performances is one of the social tools used to deepen relationships and friendships with colleagues and friends.	3.36	3.29	3.38
	Musicals allow me to broaden social networks with friends and acquaintances.	3.41	3.54	3.36
	I go to see musicals because the cost is relatively low (or free).	2.71	2.45	2.81

(unit: points)

2) Degree of Involvement of Theater and Musical Audience

As far as the degree of interest was concerned, the answer 'I spend a lot of time gathering information related to the theater' (3.34 points) was found to score highest in conjunction with the theater. Meanwhile, 'I spend a lot of time gathering information about musicals' and 'I go to watch the musical I want to see even if the venue is far or ticket prices are high' (3.43 points each) were the most commonly given answers for musicals. In this regard, while frequent viewers were more prone to answer 'I go to watch the musical I want to see even if the venue is far or ticket prices are high', infrequent viewers were more likely to answer 'viewing theatrical or musical performances merely represents one of the ways to spend leisure time'.

Table 2-3 Degree of Interest in Theatrical Performances

Statement	Total (n=1,000)	Frequent Viewer (n=281)	Infrequent Viewer (n=719)
I spend a lot of time gathering information related to the theater.	3.34	3.66	3.21
I go to watch the theatrical performance I want to see even if the venue is far or ticket prices are high.	3.31	3.73	3.15
Rather than any specific affection for theatrical performances, I regard the latter as one of the ways to spend leisure time.	3.28	3.05	3.37
I often discuss theatrical performances with others.	3.02	3.46	2.85
Theater is an important part of my life.	3.03	3.49	2.85
I want to participate in a theater-related educational program.	3.02	3.34	2.89
People ask me for theater-related information.	2.91	3.43	2.71
I would like to have an occupation related to performances or am currently engaged in the performance sector.	2.81	3.10	2.70
I read theater related magazines and visit specialized theater sites on a regular basis.	2.79	3.20	2.63
I have participated in or am currently involved with a performance related club(s).	2.73	3.24	2.53
I have participated in or am currently participating in specialized training pertaining to the theater.	2.32	2.42	2.27

(unit: points)

Table 2-4 Degree of Interest in Musical Performances

Statement	Total (n=1,000)	Frequent Viewer (n=264)	Infrequent Viewer (n=736)
I spend a lot of time gathering information about musicals.	3.43	3.94	3.25
I go to watch the musical I want to see even if the venue is far or ticket prices are high.	3.43	4.01	3.23
Rather than any specific affection for musicals, I regard the latter as one of the ways to spend leisure time.	3.21	2.82	3.34
I often discuss musical performances with others.	3.13	3.75	2.90
Musicals are an important part of my life.	3.13	3.81	2.88
I want to participate in a musical-related educational program.	3.09	3.61	2.91
People ask me for musical-related information.	3.04	3.76	2.78
I would like to have an occupation related to performances or am currently engaged in the performance sector.	2.91	3.28	2.77
I read musical related magazines and visit specialized musical sites on a regular basis.	2.88	3.47	2.67
I have participated in or am currently involved with a performance related club(s).	2.74	3.37	2.51
I have participated in or am currently participating in specialized training pertaining to musicals.	2.26	2.31	2.24

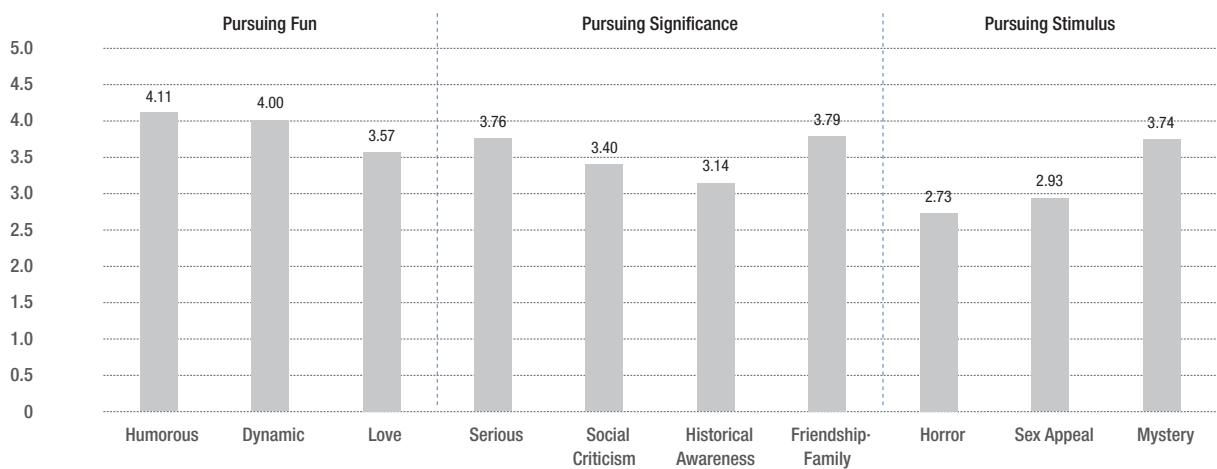
(unit: points)

3. Preferences of Theater and Musical Audience

1) Preferred Contents

The survey found that while theatrical performance viewers preferred performances with humorous contents, musical performance viewers preferred performances that boasted dynamic contents.

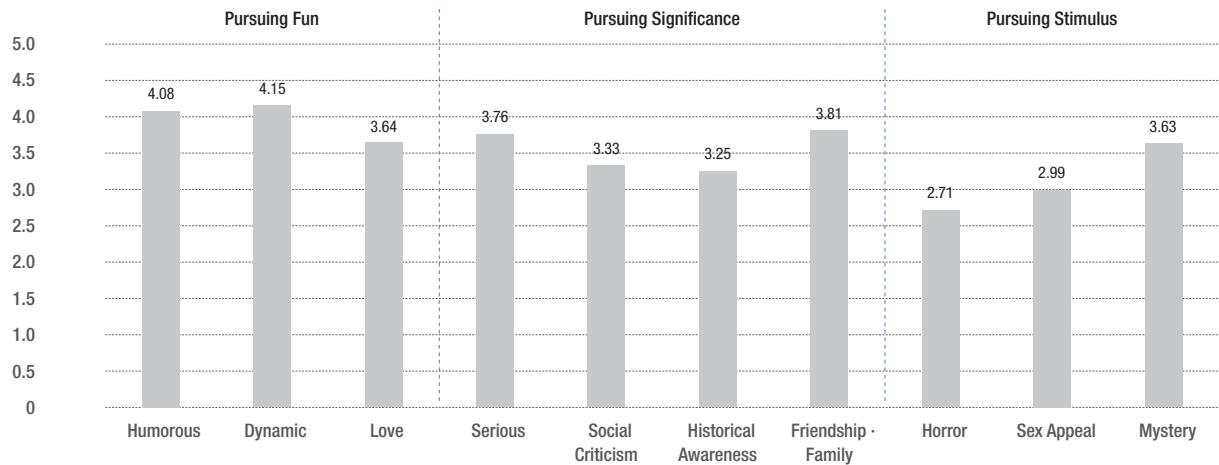
Figure 2-4 Preferred Contents in Terms of Theatrical Performances



	Statement	Total (n=1000)	Frequent Viewer (n=281)	Infrequent Viewer (n=719)
Pursuing Fun	I prefer theater with humorous contents.	4.11	4.04	4.14
	I prefer theater with dynamic contents.	4.00	4.08	3.97
	I prefer theater that depicts a love story.	3.57	3.58	3.57
Pursuing Significance	I prefer theater with serious contents that makes me seriously think about life.	3.76	3.96	3.68
	I prefer theater which contains social criticism.	3.40	3.47	3.37
	I prefer theater that deals with historical awareness or seeks to reproduce a specific period.	3.14	3.28	3.08
	I prefer theater that depicts a warm friendship or love for family.	3.79	3.84	3.77
Pursuing Stimulus	I prefer scary theatrical works.	2.73	2.75	2.72
	I prefer theater that showcases sex appeal.	2.93	2.94	2.93
	I prefer theater that involves a good mystery.	3.74	3.86	3.69

(unit: points)

Figure 2-5 Preferred Contents in Terms of Musical Performances



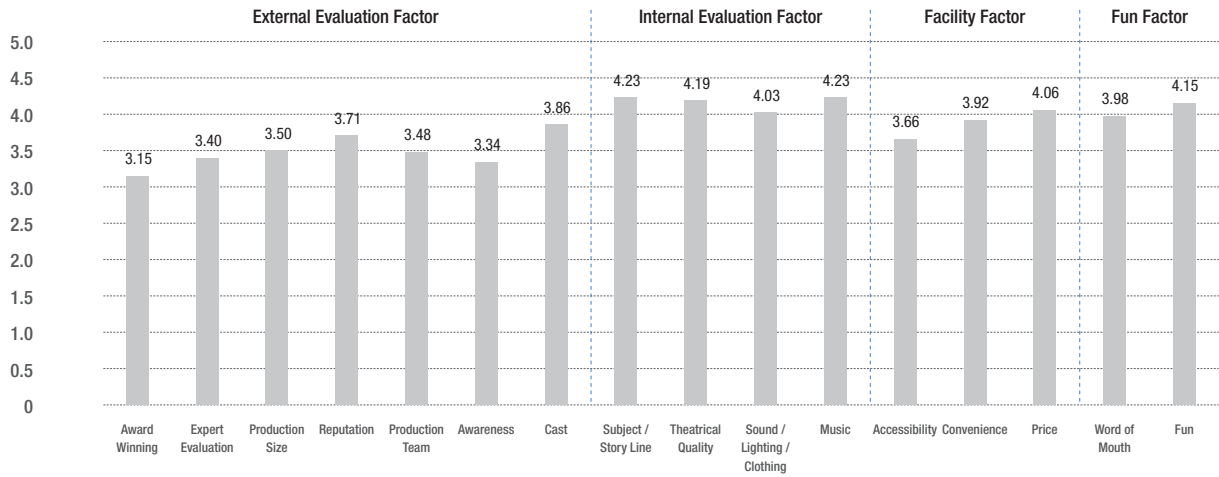
	Statement	Total (n=1000)	Frequent Viewer (n=264)	Infrequent Viewer (n=736)
Pursuing Fun	I prefer musicals with humorous contents.	4.08	4.05	4.09
	I prefer musicals with dynamic contents.	4.15	4.22	4.13
	I prefer musicals that depict a love story.	3.64	3.59	3.65
Pursuing Significance	I prefer musicals with serious contents that make me seriously think about life.	3.76	3.97	3.68
	I prefer musicals that contain social criticism.	3.33	3.41	3.30
	I prefer musicals that deal with historical awareness or reproduce a specific period.	3.25	3.40	3.19
	I prefer musicals that depict a warm friendship or love for family.	3.81	3.85	3.80
Pursuing Stimulus	I prefer scary musicals.	2.71	2.69	2.72
	I prefer musicals that showcase sex appeal.	2.99	2.96	3.00
	I prefer musicals that involve a good mystery.	3.63	3.75	3.58

(unit: points)

2) Important Factors in the Selection of a Performance

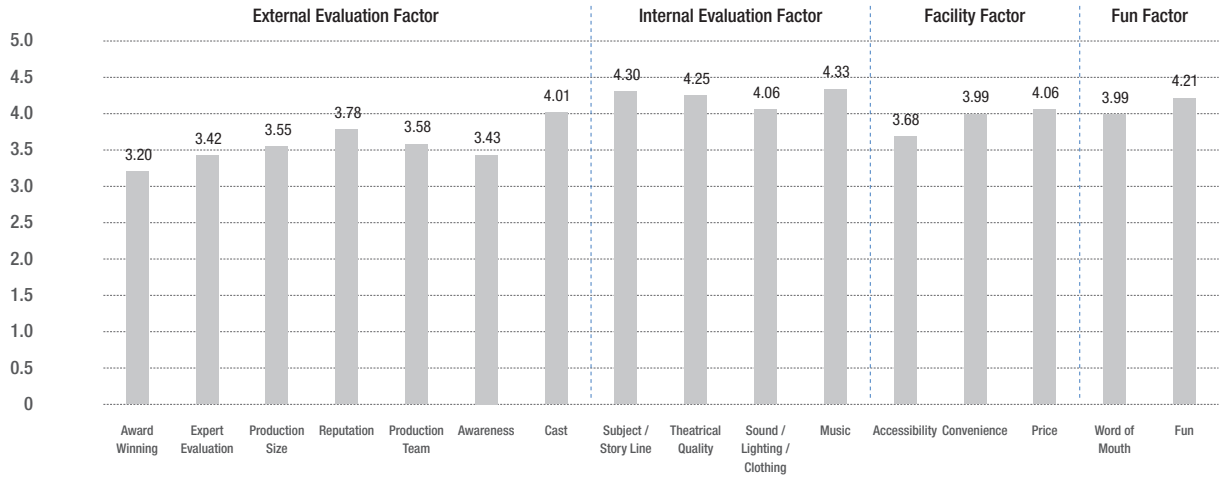
The most important factors when selecting a performance to view were found to be contents and storyline in the case of theatrical performances and music in that of musical performances. While frequent viewers of theatrical performances focused on internal factors such as theatrical quality, frequent viewers of musical performances strongly emphasized the music.

Figure 2-6 Important Factors in the Selection of Theatrical Performance



Statement	External Evaluation Factor							Internal Evaluation Factor				Facility Factor			Fun Factor	
	Award Winning	Expert Evaluation	Production Size	Reputation	Production Team	Awareness	Cast	Subject / Story Line	Theatrical Quality	Sound / Lighting / Clothing	Music	Accessibility	Convenience	Price	Word of Mouth	Fun
Overall (n=1,000)	2.92	3.30	3.24	3.55	3.32	3.20	3.66	4.24	4.17	3.78	3.87	3.62	3.82	3.99	3.95	4.08
Frequent Viewer (n=281)	2.79	3.12	3.10	3.51	3.47	3.10	3.77	4.31	4.29	3.80	3.84	3.56	3.84	3.96	3.86	3.96
Infrequent Viewer (n= 719)	2.98	3.37	3.30	3.57	3.27	3.24	3.62	4.21	4.13	3.78	3.88	3.65	3.81	4.00	3.98	4.13

Figure 2-7 Important Factors in the Selection of Musical Performance



Statement	External Evaluation Factor							Internal Evaluation Factor				Facility Factor			Fun Factor	
	Award Winning	Expert Evaluation	Production Size	Reputation	Production Team	Awareness	Cast	Subject / Story Line	Theatrical Quality	Sound / Lighting / Clothing	Music	Accessibility	Convenience	Price	Word of Mouth	Fun
Overall (n=1,000)	3.20	3.42	3.55	3.78	3.58	3.43	4.01	4.30	4.25	4.06	4.33	3.68	3.99	4.06	3.99	4.21
Frequent Viewer (n=264)	3.03	3.22	3.43	3.75	3.77	3.37	4.32	4.44	4.37	4.15	4.60	3.54	4.08	4.08	4.10	4.20
Infrequent Viewer (n= 736)	3.26	3.49	3.60	3.79	3.51	3.45	3.90	4.25	4.21	4.03	4.23	3.72	3.96	4.06	3.96	4.21

Analysis of Theater and Musical Audience Taste Patterns

1. Types of Audience Taste Patterns

1) Classification of Detailed Market Sectors

The survey of theatrical and musical performance viewers found certain similarities in terms of the viewing types and characteristics exhibited by viewers in both of these sectors. Based on the number of theatrical and musical performance views, viewers were separated into the 'leisure consumer type', 'preference for theater type', 'preference for musicals type' and 'performance maniac type'.

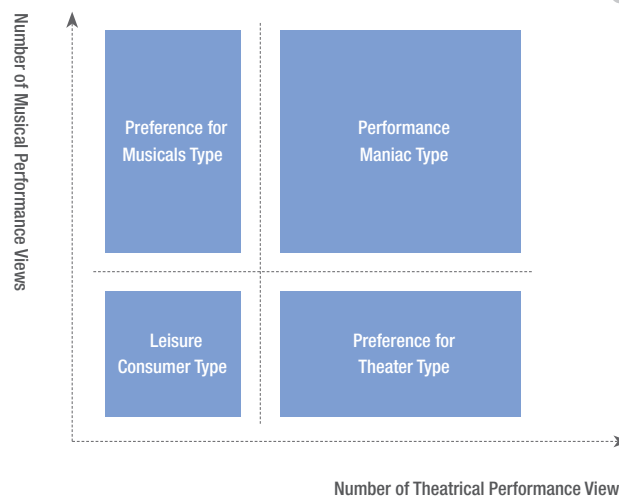
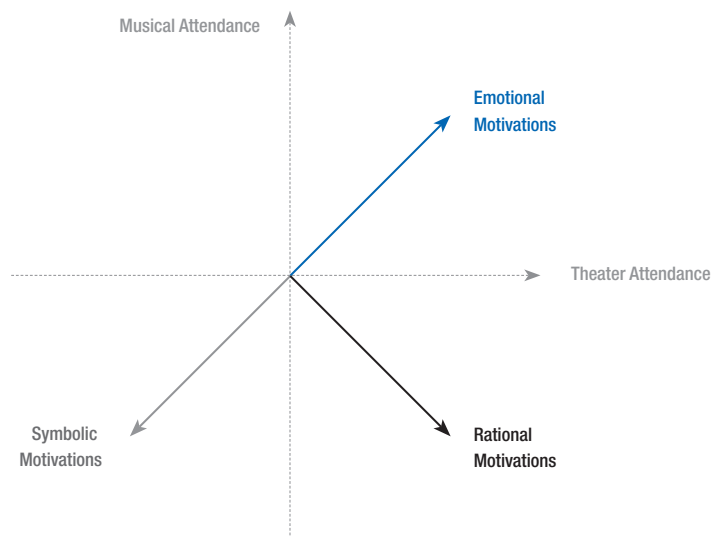


Figure 3-1 Detailed Market Sectors

The performance maniac type includes viewers that consume 10 times more performances than the leisure consumer type. The preference for musicals and preference for theater types are made up of those that view performances on a regular basis. More to the point, they viewed performances 7 times a year on average. The leisure consumer type is made up of consumers that exhibit the lowest degree of performance viewing in conjunction with both sectors.

The examination of the relationship between the number of theatrical and musical performance views and degree of involvement based on the Multiple Dimensional Scaling¹ revealed that the degree of involvement in performances tended to rise along with the number of theatrical and musical performance views. In cases where the number of views for both performance types was lower, the viewing of such performances tended to merely be regarded as a leisure activity.

Figure 3-2 Relationship between the Attendance and Motivations for Attendance

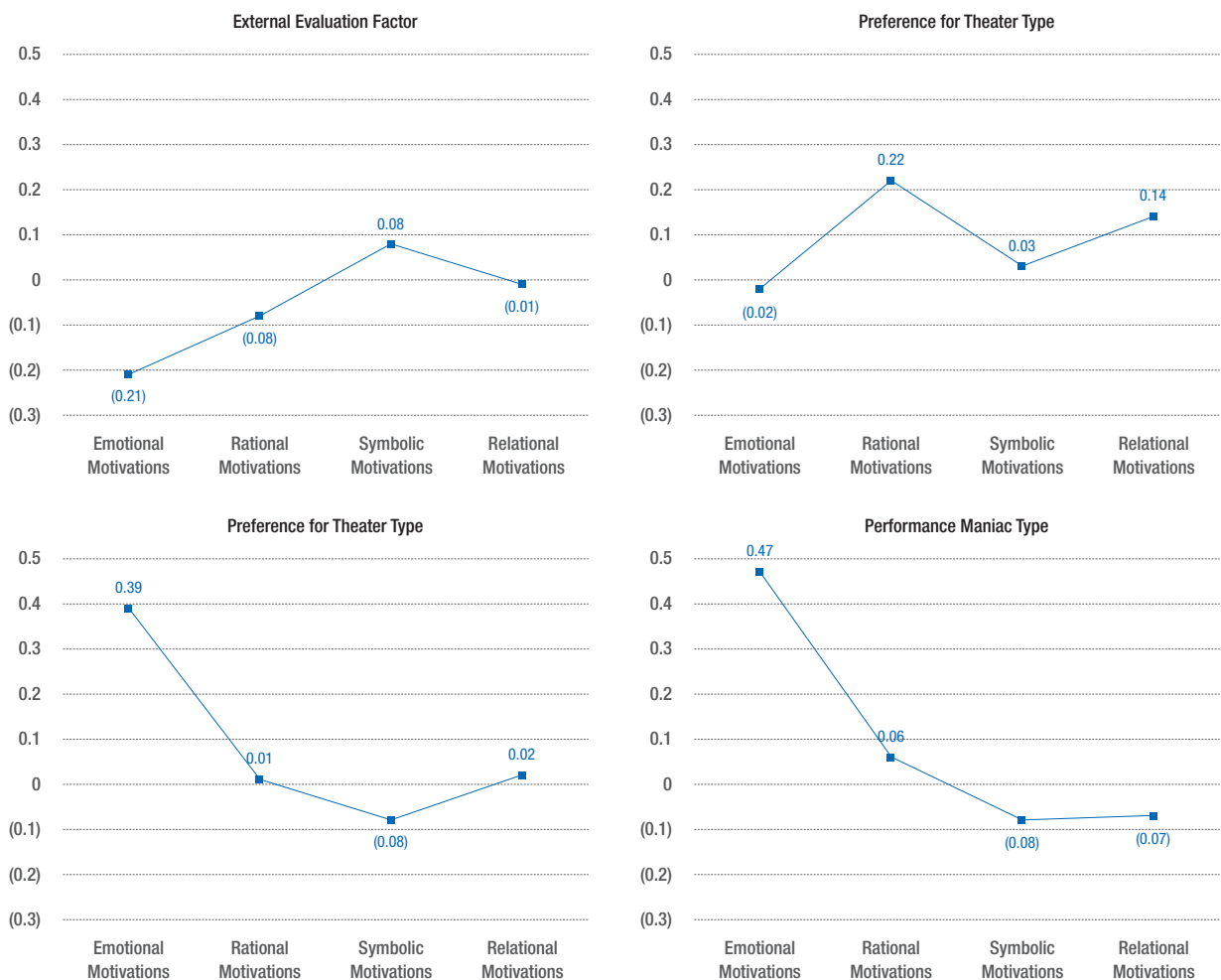


¹ This represents a quantitative method of visualizing the complex multi-dimensional relationship between the attributes of analytical subjects (performances) as a simple composition rendered in a two-dimensional or three-dimensional space.

2) Motivations for Attendance

In terms of motivations for the viewing of performances, emotional motivations tended to prevail in cases where a greater number of performance views were recorded. Moreover, the lower the emotional motivations became, the more prevalent symbolic motivations such as showing off in front of others became. In this regard, while the leisure consumer type showed a low degree of emotional motivations, they did exhibit a high degree of symbolic motivations such as being recognized by others. For their part, the performance maniac type exhibited a high degree of emotional and rational motivations and a low degree of symbolic and relational motivations. The preference for theater type exhibited a higher degree of rational motivations than the other groups, a denouement that can be attributed to their desire to use theatrical performances as a means to engage in profound contemplation. The preference for musicals type, which regarded the viewing of performances as a means to feel excitement and alleviate stress, displayed a high degree of emotional motivations.

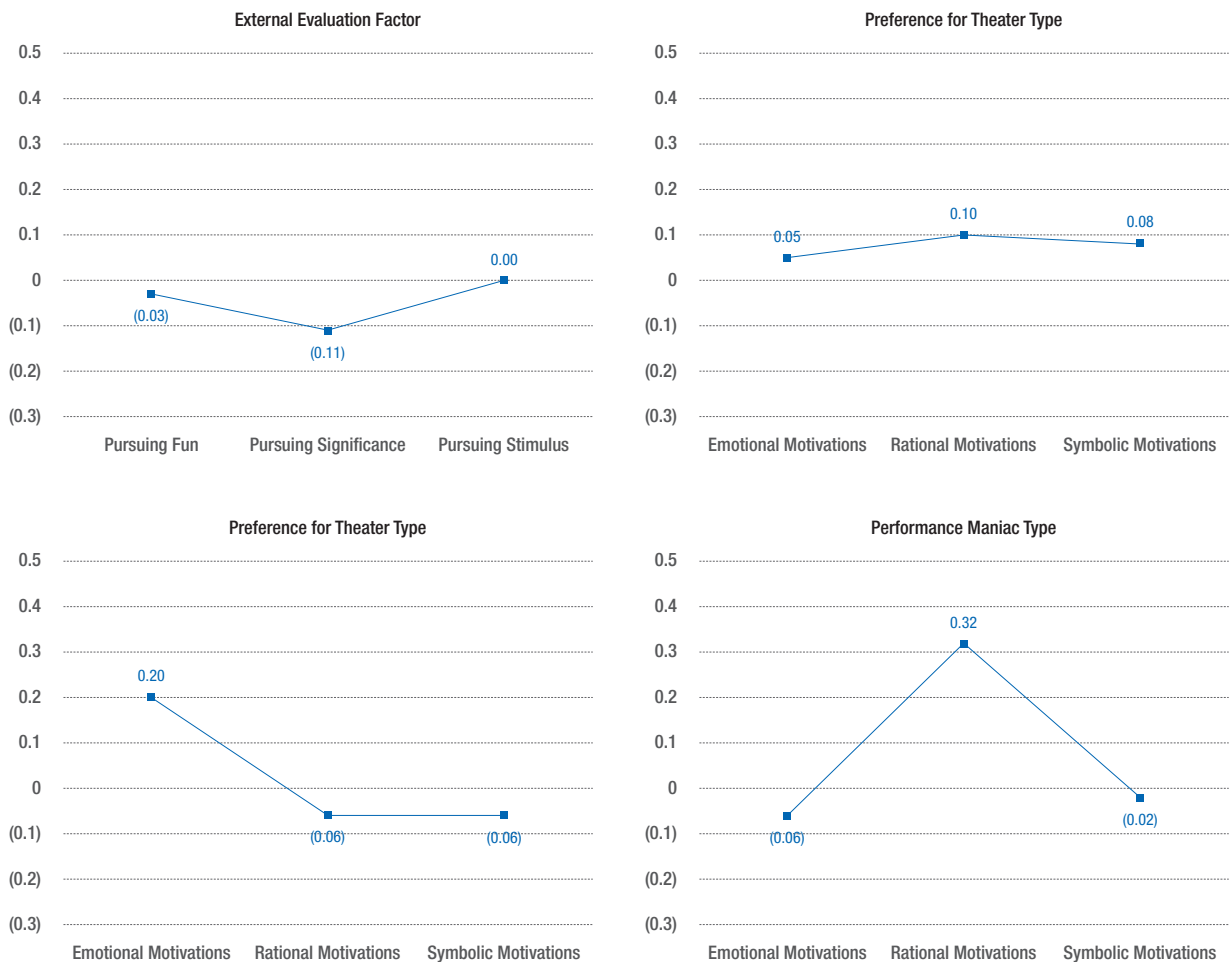
Figure 3-3 Motivation for Attendance by Detailed Market Sector



3) Preferred Performance Contents

Differences were also recorded between these types in terms of preferred performance contents. The leisure consumer type exhibited a low level of preference in conjunction with all genres, with the lowest preference being associated with theatrical performances displaying social issues. This type of performance viewer preferred relatively stimulating genres such as thrillers, horror, and erotic works. Meanwhile, the performance maniac type exhibited the highest level of preference for theatrical performances displaying social issues. Conversely, the lowest level of preference was found in conjunction with public genres that pursue fun or stimulating genres. The preference for musicals type showed the highest level of preference for public genres that pursue fun. Finally, the preference for theater type exhibited the highest preference for the impact-seeking genre.

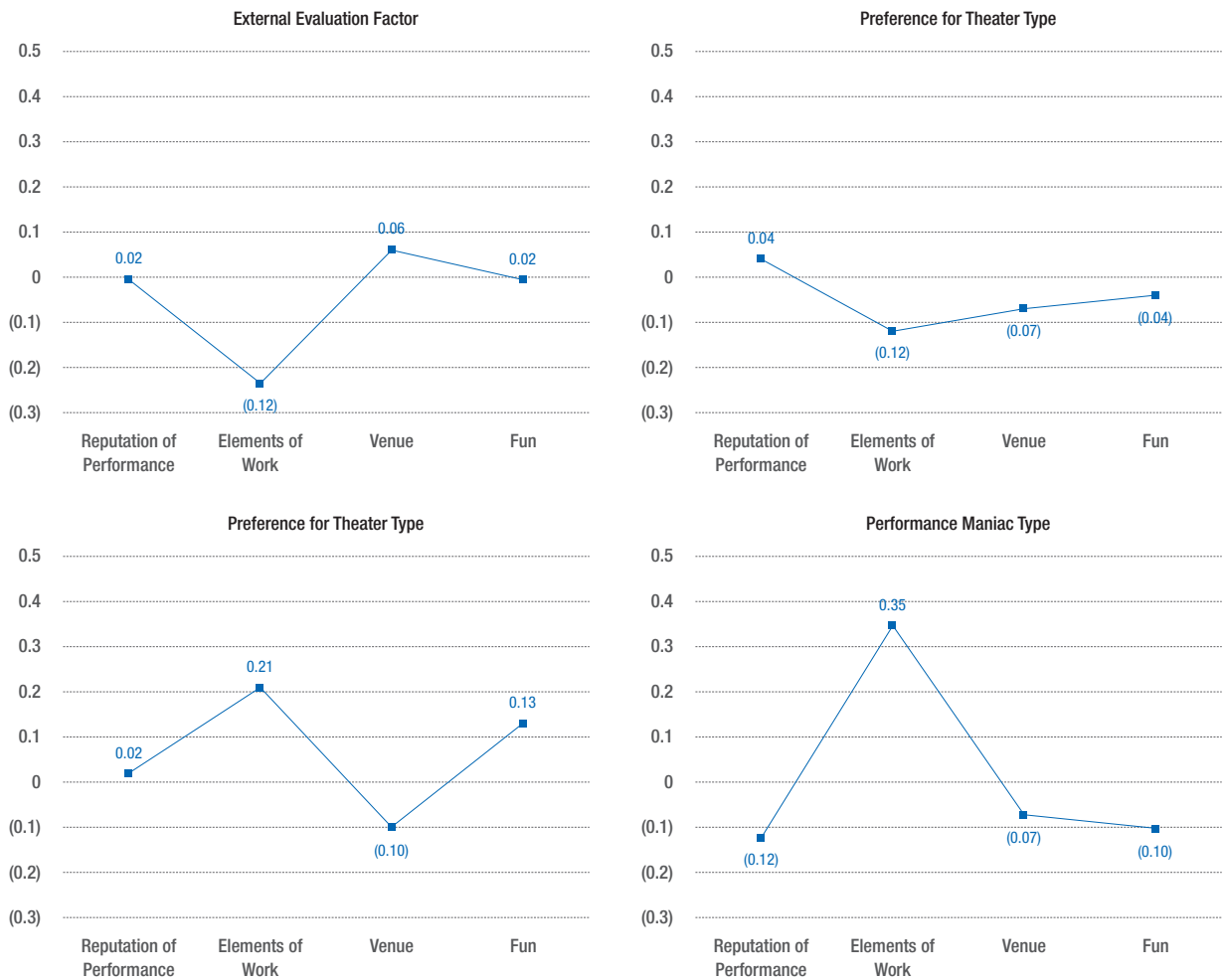
Figure 3-4 Preferred Contents by Detailed Market Sector



4) Selection of Performances

With regard to the factors that influenced the selection of a performance, the leisure consumer type tended to regard venue facilities as being more important than the actual work. For their part, the performance maniac type tended to regard the internal factors associated with the work as being more important. The preference for theater type attached great importance to the reputation of a performance. While the preference for musicals type regarded internal factors such as music as being important, they viewed external evaluation and venue facilities as being of less importance.

Figure 3-5 Important Factors by Detailed Market Sector



5) Demographic Statistics

Women in their 20s-30s made up a high ratio of performance viewers across all types. Such viewers also tended to have a strong academic background and make significant expenditures for cultural consumption viewers. The ratio of women viewers was high across all types except the leisure consumer type. Viewed from the standpoint of age, the leisure consumer type tended to be made up of those in their teens to 40s. The second most popular type for viewers in their 40s after the leisure consumer type was the preference for theater type. The ratio of viewers in their 20s-30s was highest amongst the performance maniac type. Viewed from the standpoint of academic background, the survey found a significant number of those who only graduated from middle or high school within the leisure consumer type. While a high ratio of the preference for theater type was made up of those who were attending graduate school, a strong portion of the preference for musicals type was made up of those who were currently attending university. A high ratio of performance maniac type was composed of those who were currently attending or had completed graduate school. In terms of expenses for cultural consumption purposes, the leisure consumer type tended to spend less than 50,000 won a month for such ends. While the preference for musicals type spent an average of 210,000-300,000 won a month, the performance maniac type spent 410,000-500,000 won a month for such purposes.

2. Measures to Expand Audience for Individual Sectors

The leisure consumer type, which is made of individuals with generalized tastes, prefers contents that typically revolve around the pursuit of fun like melodramas, action and comedies. As such, the focus in this regard should be on the promotion of long running high exposure performances or imported brands. In addition, specific periods such as vacation periods, holidays (Chuseok and New Year's Day) and anniversaries should be focused on in conjunction with this type of viewer. On the other hand, those belonging to the performance maniac type focus on internal factors when choosing performances. As such, they should be regarded as the main targets when it comes to the promotion of performances that pursue significance such as serious dramas and the genres dealing with social issues. The preference for theater type pursues serious contents such as social problems, historical dramas and human dramas. Here, it is important to understand that this tendency is also reflected in the selection of other types of performances. Musical viewers possess generalized tastes and tend to prefer fun contents over serious theatrical performances. They regard internal factors such as music as being of great importance when choosing performances. They also exhibit a tendency to purchase related goods in cases where a heavy sense of excitement and empathy has been created in conjunction with the performance.

These results imply that the production of contents that theatrical performances highlighting emotional aspects and pursuing fun constitute a good means of reaching out to musical viewers. The production of musical performances based on significant or historical contents also represents an effective means of attract theater viewers.

In addition, the leisure consumer type places more importance on a venue's facilities and accessibility than the actual contents of the performance. As such, well-known venues and those with easy accessibility and good facilities represent an effective means of attracting this type of viewers. On the other hand, the preference for theater type tends to consume more beverages and make use of cultural spaces before and after performances. In this regard, goods linked to the performance should be jointly promoted with surrounding facilities, restaurants and cafes. The preference for musicals type and performance maniac type actively participate in performance related activities such as taking photos at the actual site of the performance and getting autographs from actors. Thus, the emphasis should be on the development of various fresh programs that the viewers can participate in before and after the performance. Furthermore, given the fact that these groups purchase the most performance related goods, it stands to reason that additional profits can be expected once various goods are developed and sold. In this regard, as the performance maniac type participates in performance related educational programs or has intends to take part in such programs, venues (especially large-scale venues) should focus on developing educational programs for them.

Figure 3-6 Comparison of Motivations

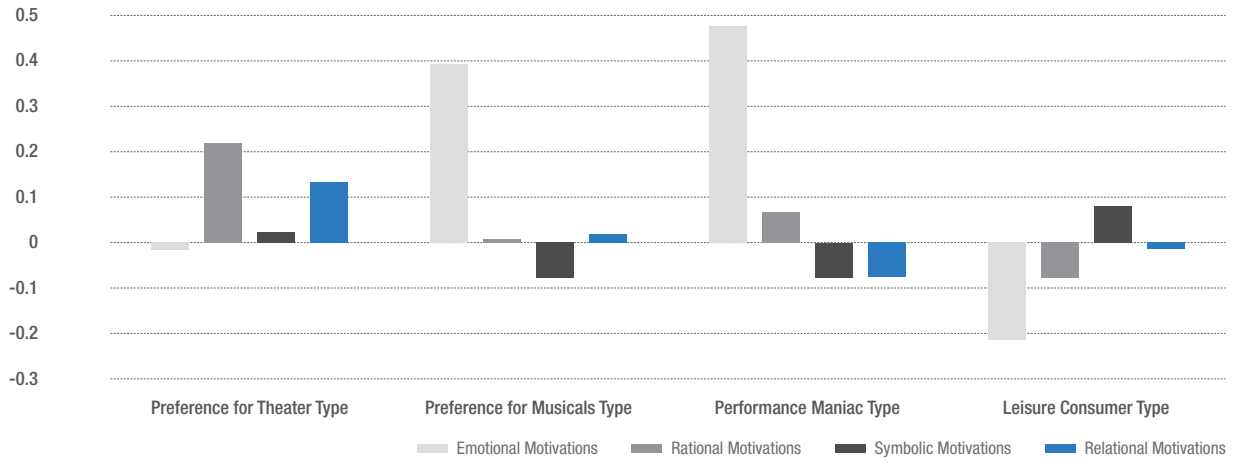
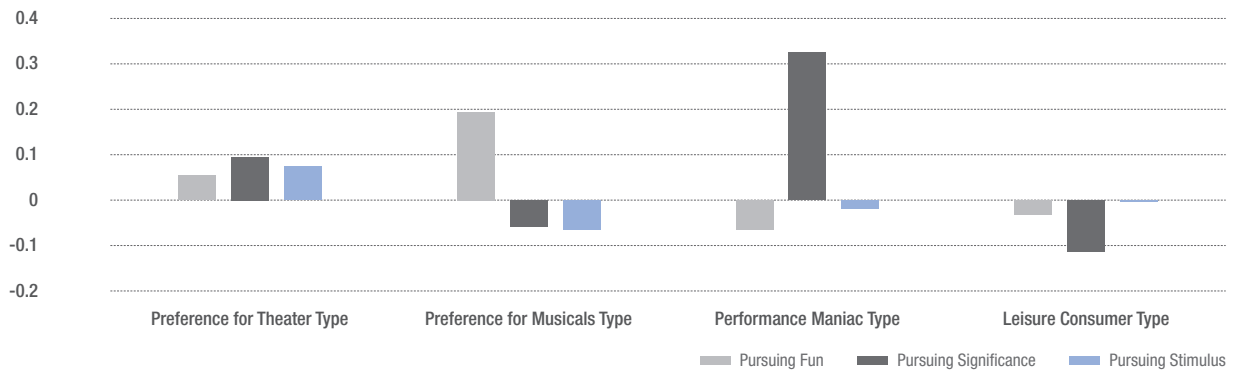


Figure 3-7 Comparison of Preferred Contents



2008 Survey of Theater and Musical Audiences (based on 2007)

Korea Arts Management Service The Korea Arts Management Service (KAMS), established in January 2006, is a branch organization of the Ministry of Culture, Sports and Tourism, Republic of Korea. KAMS offers multifaceted assistance in international exchanges, human resources training, research, and consultancy for arts groups and art organizations in order to promote more effective arts management in Korea.
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