Branson Theatre Industry Study

General Music and Theater Industry Survey Analysis

Branson/Lakes Area Chamber of Commerce and CVB

Introduction

This report presents the results of Branson's General Music and Theater Industry Survey, conducted by Sound Diplomacy in collaboration with the Branson/Lakes Area Chamber of Commerce and CVB. The survey was addressed to all Branson citizens - those directly related to the live theater industry as well as audience members.

The survey's primary objective was to better understand the factors that impact the success of Branson's live theater industry.

This report explores:

- Characterization of Branson's theater industry professionals
- Characterization of Branson's local theater audience
- Perception and ratings of Branson's live theater ecosystem

Theoretical Framework

Live theater industry professionals and the theater audience are very important actors within the performing arts scene. To better understand how they fit into the overall ecosystem of the performing arts it is important to consider the value chain - from the conception of a creative idea to the performance/presentation to the audience. It is necessary to recognize the various additional supporting agents that surround these activities.

Figure A shows the steps that are involved in the performing arts. The **first step** is the conceptualization of the performing arts creative idea. The people involved in this step are mainly creative individuals such as creative directors, actors, choreographers, music composers, artists, festival curators, playwrights, designers, production and technical workers in a theater or creative producers.

The **second step** is the production or materialization of the idea into a show. This involves casting actors, dancers, and musicians; the design of scenery and wardrobe, pre-marketing, hiring of technicians and performers, and rehearsing.

The **third step** is the distribution which consists of how the performing arts show is presented and communicated to an audience. It considers the marketing strategy and channels defined to reach the target audience. The main individuals involved in this part of the chain are ticket-selling companies, theaters, artist agents, tour managers and commercial producers.

The **fourth step** is the delivery mechanism used to reach the audience. This mainly constitutes the type of infrastructure used for the performing arts show to take place. These are very diverse and can differ in size and location. Amongst the most common infrastructure locations are theaters, clubs, open air theaters, etc.

The **last step** is the moment when the audience experiences the performing arts show. It is defined as the consumption of the creative expression. The main participants of this step are the audience and the actors, musicians or performers. During this step the audience can also provide feedback of the performance via printed or digital reviews by critics (professional or non-professional), blogs or word of mouth.

Figure A. Value Chain of Performing Arts Sector

Theaters can participate in any or all of the steps, depending on the level of involvement they have with the initial idea. Not only can they participate in all the steps, but they are key receptors of the input provided by other stakeholders that surround the Performing Arts Sector:

- **Education:** for all the individuals that participate throughout the value chain, there are educational institutions that can provide the relevant knowledge or skills needed to have a high-quality performance (from the creators, administrators, legal advisors, marketeers or other people involved).
- **Professional Support and Development:** there are individuals and organizations that provide additional support to the people in the chain, aiming to protect their rights, such as agents, unions, sector communities or groups, copy-right organizations or institutions that support the creative exchange.

- **Development of the audience/market:** there are specialized organizations and individuals that can play an active role in helping the performing arts sector to generate a bigger audience or developing a new target audience. Such organizations can be festivals, business conferences and schools.
- **Financial support and investment:** performing arts has traditionally been a high receptor of government or private aids via tax benefits, grants or donations. These can become a very important source to finance performing arts activities.
- **Strategic development:** there are some public and private organizations that carry out research or sector studies while developing strategic input for the sector. With the input they provide, anyone that is an active participant of the performing arts sector can benefit by gaining a broader perspective and adapting strategic recommendations to strengthen the sector.

The above explains the diverse interactions and dependencies amongst several agents within the performing arts sector.

Methodology

The main goal of the study is to better understand the key players of the music and live theater sector in Branson such as: “show performers or musicians,” “workers in the Branson theater industry, or a related industry such as ticket sales” and “theater fans/residents of Branson.” Additionally, we wanted to better understand perceptions of several aspects of the theater ecosystem in the city in order to prioritize necessary improvements.

An online survey was developed by Sound Diplomacy in collaboration with the Branson / Lakes Area Chamber of Commerce & CVB and distributed to the local community. The survey was approximately 15-20 minutes long, depending on the respondents’ role in the local live theater ecosystem. It was conducted from 12/18/19 to 1/31/20. No incentive was provided to the participants. A total of 437 responses were collected. Of those, 25 were show performers or musicians, 72 were workers in the Branson theater industry or a related industry, 190 were theater fans/residents of Branson and 150 were people who live outside of Branson, but have attended theater performances in Branson. The total 437 completed responses provided a margin of error of +/- 4.6% at the 95% confidence level.

The survey questionnaire was organized into the following sections:

Aspect	Details
Introduction	The questions included in this section aimed to segment the respondents according to the role they play in the live theater ecosystem in Branson.
Personal Information	This section explored demographic characteristics of the respondents such as age, sex and race.
Live Theater Ecosystem Role	This section revealed the respondents' role in the local live theater industry or related industry.
Company Information	This section was designed exclusively for company owners, CEOs or general managers in order to better understand their organizations (for-profit or non-profit; year of foundation).
Company Personnel	This section was designed exclusively for company employees, exploring information on company employment and skills required in the organization.
Employee/Freelancer Details	This section explored contract types and the types of activities employees/freelancers perform in the sector.
Performer/Musician of a Branson Theater Show Details	This section was designed exclusively for performers/musicians in the local live theater industry. Questions explored the type of format or genre they perform and business relationships they have with other agents in the sector (e.g., agents, managers, etc).
Third Party Ticket Sellers	This section was designed exclusively for third party ticket sellers, exploring ticket sales volumes, discounts and selling strategies.
Grants Information	The sections inquired about grants and tax benefits that organizations have received. It further explored the reasons why organizations have not received or applied for them.
Professional Opinion	This section delved into perceptions of Branson's live theater ecosystem and desired areas of support.
Live Theater Audience Information	This section was designed exclusively for theater fans/audiences. The goal was to better understand preferred

	types of performances and formats, how they find or chose shows and reasons for not attending shows more frequently.
Live Theater Audience Ratings	This section was designed exclusively for theater fans/audiences and measured their perception of various aspects of Branson's live theater sector.
Closing questions	This section provided an opportunity to leave any additional remarks.

Based on live theater ecosystem role and provided information, the data was processed to reveal:

1. Characterization of the segments:
    a. Show performers or musicians
    b. Workers in Branson's theater industry, or a related industry
    c. Local theater fans/audiences
2. Overview of the above segments' perceptions of the different aspects and conditions that impact them within the live theater ecosystem.

Executive Summary

Below is a summary of key insights of Branson's General Music and Theater Industry Survey, including show performers/artists, workers in Branson's live theater industry or related industries and live theater fans/audiences.

Workers in Branson's theater industry (or related industry)

- Only 19% of the workers in Branson's theater industry (or related industry) are members of the Theater League and 13% are part of another organization. This indicates a potential for increased involvement in the decision making opportunities gained via such channels.
- Based on the data provided by 7 third party ticket sellers in Branson, ticket sales accounted for an average of $23,640 annually. Third party ticket sellers tend to buy tickets at a 22% discount from theaters on average, discounting being the resellers' core ticket selling strategy.
- According to surveyed employees/freelancers, most of them work full time for the theater sector (77%). This implies a high level of required time investment in the activities inherent to the theater sector.

Theater show performers/musicians

- The surveyed musicians/performers work primarily in variety shows (44%). The primary performed music genres are Country (40%), Christian & Gospel (32%), Pop (32%) and Rock (28%). According to the surveyed theater fans, this matches current audience interests. However, there is an opportunity to modernize content, since the main reason audiences give for not attending shows is that they feel the content is too dated.
- The average number of shows per performer is 152 annually, most of which are national performances. This translates into an average of 5 performances per week. This is in line with the finding that 68% work exclusively as performers with no other jobs on the side.
- Most of Branson's surveyed live theater employees/freelancers don't have any business relationships with supporting agents in the sector, such as PR agents, managers, etc. It's possible that since most of them are already full time employees, they're less likely to have a need for booking additional performances or shows in other areas and therefore don't require any such support.

Theater fans/audiences

- More than half (62%) of local live theater audiences attend shows only once per year. This indicates a high potential to increase local engagement. To reach this audience, the shows and theaters should consider online media - particularly search and social media - seeing how the audience mainly uses those channels to find out about performances (64% and 59%, respectively).

Overall remarks

- The survey revealed an overall expressed interest to improve skills in online/social media, marketing, PR and data analysis. Therefore, the private and public sector may want to consider investing in educational programs to help further develop such skills.
- When asked to rate Branson's theater sector on a scale of one to five, with one being poor and five being excellent, the overall score was 2.6 - which is below neutral, indicating lots of room for improvement in several categories. Examples include more funding support and addressing the distribution step within the value chain by exploring regulations around third party ticket distribution.

Detailed Analysis

Characterization

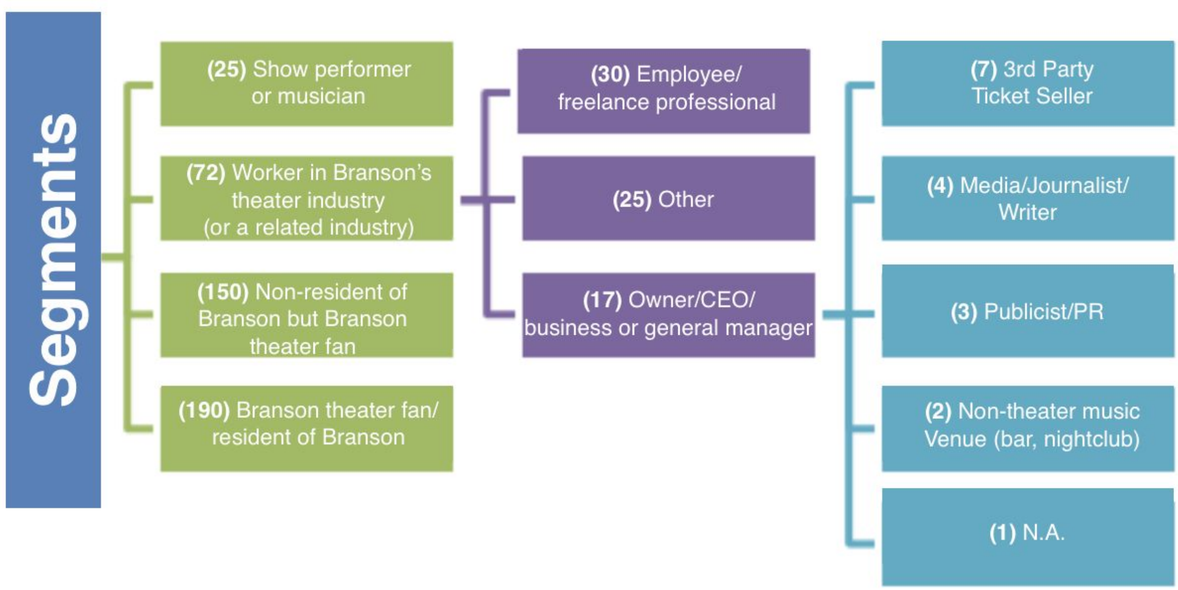
Below is the detailed analysis of Branson's General Music and Theater Industry Survey.

Live Theater Ecosystem Role

Segmentation

Figure 1 shows the respondent composition. The sample was mainly composed of local theater fans, who were either Branson residents (190) or non-residents (150). Seventy-two respondents were workers in Branson's theater industry, while 25 were show performers or musicians.

Figure 1. Respondent Type



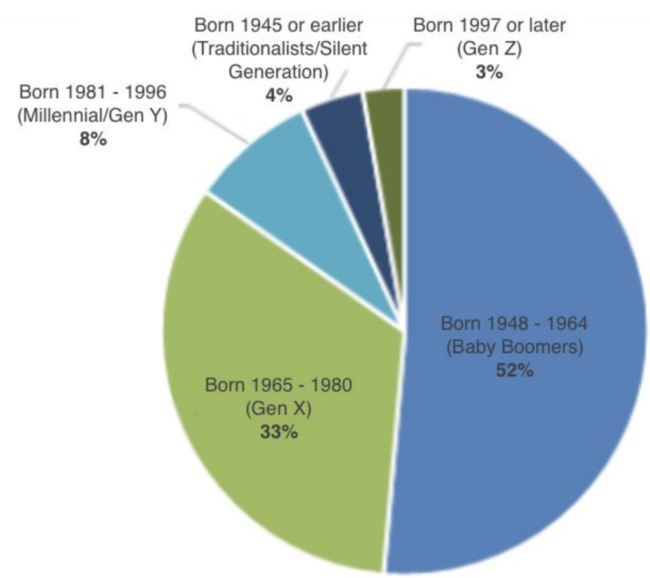
The survey explored different employment categories in Branson's live theater industry. Twenty five were performers/musicians while 72 were workers in Branson's theater industry or related industry. Of those 72, 30 were employees/freelance professionals, 17 were owners/CEOs/business or general managers of an organization in the sector and 25 were neither.

Of the 17 owners/CEO/business or general managers, seven were third party ticket sellers, four were media/journalists/writers, three were publicists/PR, two were non-theater music venues and one respondent didn't share any affiliation.

Characterization of Workers in Branson's Theater Industry (or related industry)

Based on the 72 survey respondents,[1] workers in Branson's theater industry (or related industry) are fairly equal parts female (53%) and male (43%)[2] and skew a bit older, with 52% being baby boomers (born between 1946 and 1964), 33% being Generation X (born between 1965 and 1980) and only 8% being millennials (born between 1981 and 1996) (See Figure 2). The majority (90%) described themselves as non-hispanic/latinos and white.

Figure 2. Age of Workers in Branson's Theater Industry (or Related Industry)



The study revealed that workers in Branson's theater industry (or related industry) have fairly low participation and involvement in associations or advisory boards that support the local live

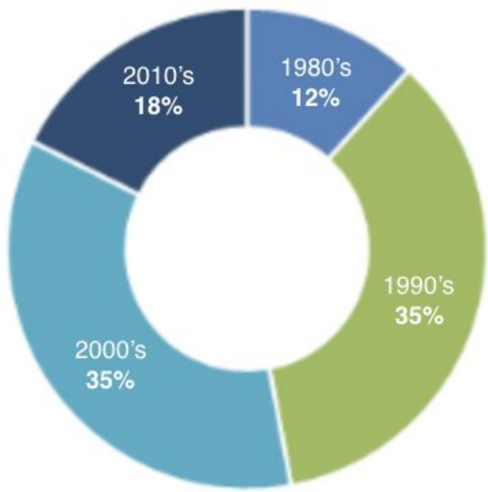
[1] Please note that this sample is fairly small and may not be fully representative of the entire population.
[2] 4% of respondents prefered not to disclose their sex.

theater industry. Only 19% of workers claim to be members of the Theater League and 13% are current members of other organizations, such as the Chamber of Commerce, Professional Tour Guide Association, CVB, the District Marketing Council, or the Show League. Higher overall participation in industry-supporting organizations may enhance the sector as a whole.

Company Information

Based on the 17 survey respondents[3] who are owners/CEO/business or general managers, all of their organizations are for-profit. As Figure 3 shows, most of the organizations were founded either in the 90's or the 00's (35% for each).

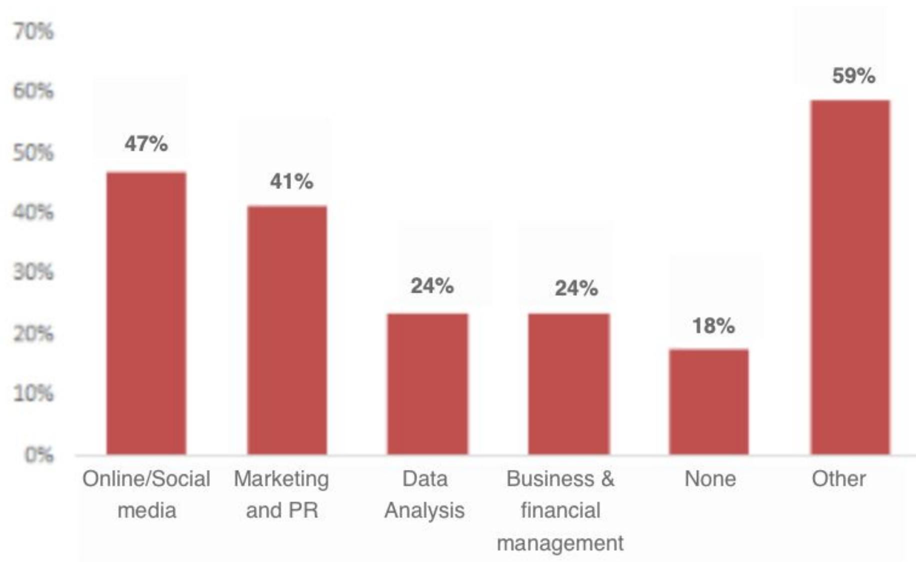
Figure 3. Decade When Organizations Were Founded



Owners, CEOs and managers are mainly interested in improving their marketing skills (Figure 4): online/social media (47%), marketing and PR (41%) and data analysis (24%).[4] Within the 'Other' skills are Legal, Regulatory, Compliance, Copyright, Technology, National and International Contacts and Mentoring/Career Development.

[3] Please note that this sample is fairly small and may not be fully representative of the entire population.
[4] Note that data analysis is a skill that can be used in different areas and for different purposes within a company, but one of the main uses is marketing - for example user segmentation for marketing strategy definition.

Figure 4. Main Skills that Owners/CEOs/Managers are Interested in Improving for their Organization



Third Party Ticket Sellers

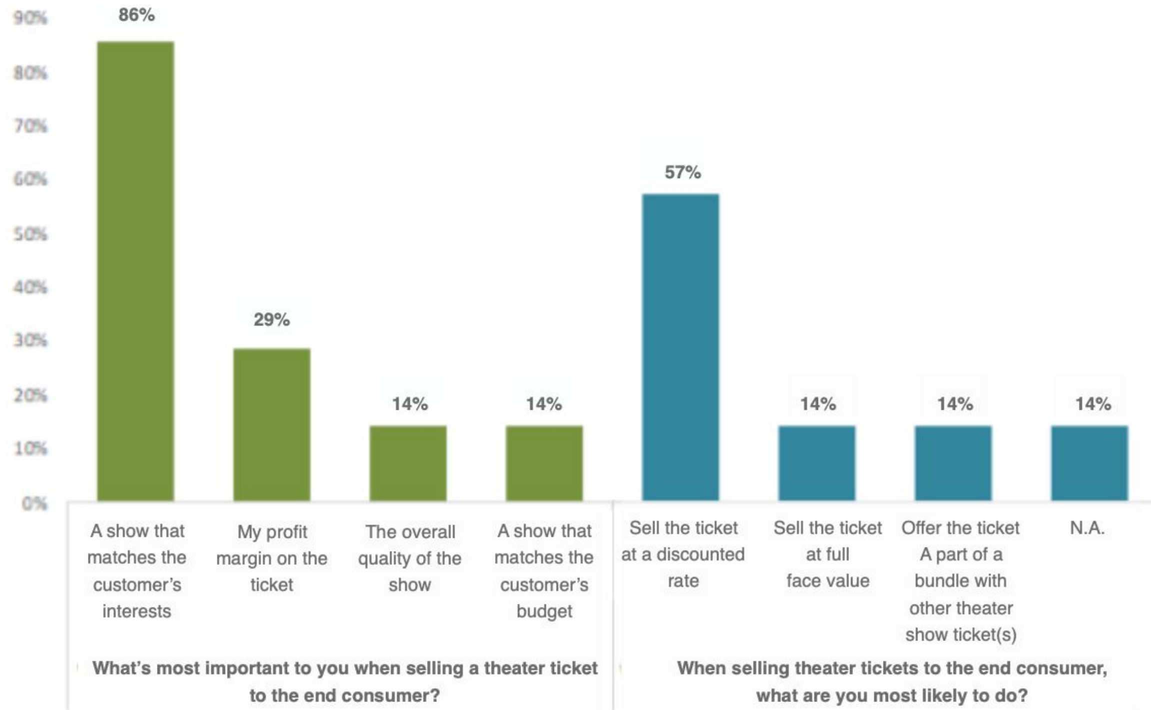
Seven of the surveyed owners/CEOs/managers were third party ticket sellers,[5] who sell an average of 23,640 tickets annually, which translates into 1,970 tickets per month.

When purchasing tickets from Branson's theaters/shows, the third party ticket sellers receive an average discount of 22%. Figure 5 shows that discounting is also the main strategy used to sell tickets to end-consumers. In order for third party ticket sellers to obtain a profit margin, they cannot pass the same 22% discount on to the end-customer and therefore likely give smaller than 22% discounts off the tickets' face value.

When asked what's most important when selling a theater ticket to the end consumer, 86% of third party ticket sellers said offering shows that match customers' interests, followed by obtaining a profit margin on the ticket (29%).

[5] Please note that this sample is fairly small and may not be fully representative of the entire population.

Figure 5. Third Party Ticket Sellers' Motivators and Pricing Strategies

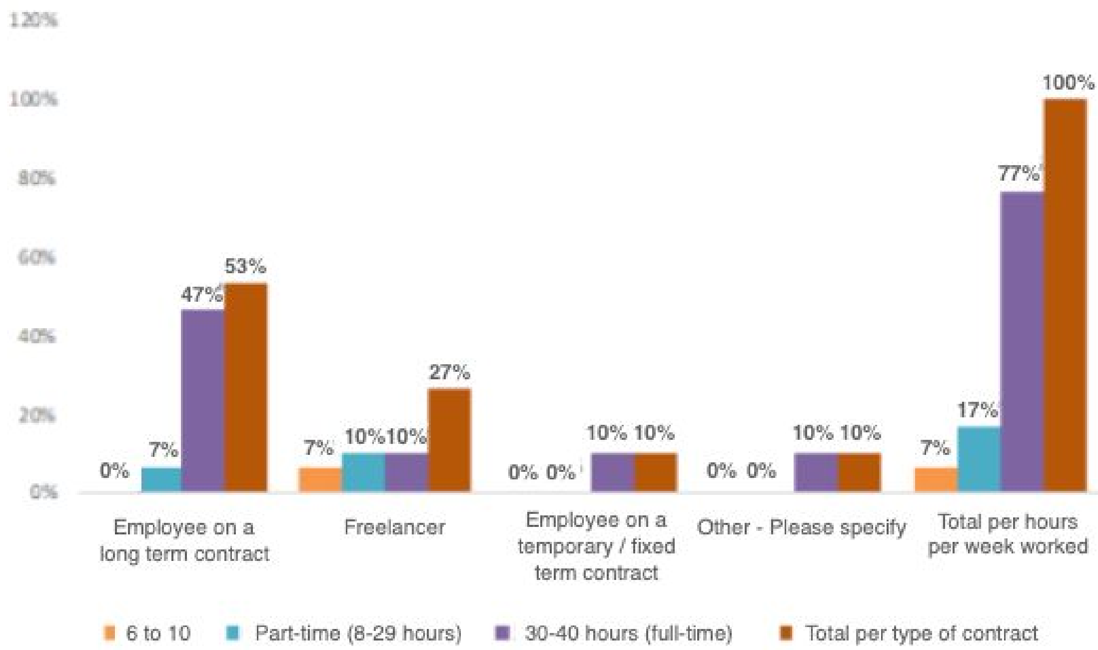


Employee/Freelancer Details

Of the 30 live theater industry (or related industry) employees/freelancers that replied to the survey,[6] the majority (77%) work full time, whereas 17% percent work part-time (8-20 hours per week) and the remaining 7% only work a few hours per week (6 to 10). As Figure 6 shows, this finding is in line with the type of contract they have. The people that are employees on a long term contract are mainly working full time (53%), followed by 47% who work part time (8-29 hours), whilst the freelancers distribute their time more evenly, either working very few hours (6-10 per week), or part time (10%) or full time (10%).

[6] Please note that this sample is fairly small and may not be fully representative of the entire population.

Figure 6. Hours Worked by Employment Type



Similar to owners/CEOs/managers, the main skills that employees or freelancers are interested in gaining or improving are marketing (63%) and online/social media (47%) (Figure 7). Advancing technology, and business and financial management skills were also desired by roughly one in four (27% and 23%, respectively).

Figure 7. Main Skills that Employers/Freelancers are Interested in Improving

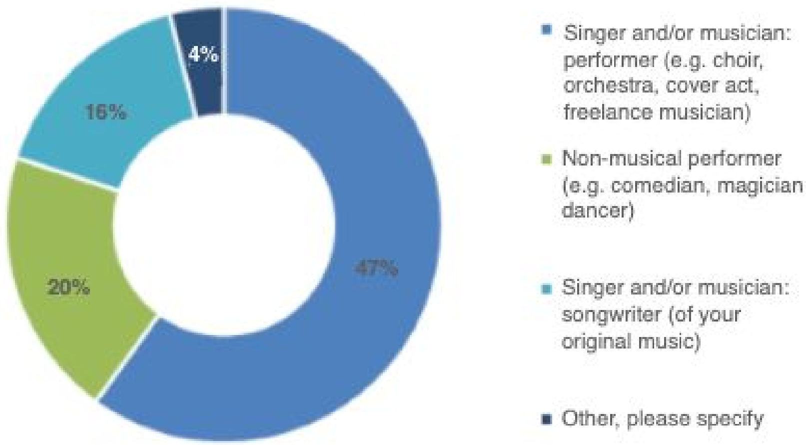
Performer/Musician Details

Findings are based on the input of 25 show performers/musicians who participated in the survey, [7] the majority of whom were male (64%), non hispanic or latino(a) (84%) and white (84%). Forty-four percent of them belong to Generation X (born between 1965 and 1980) and 40% are baby boomers (born between 1946 and 1964).

As Figure 8 shows, respondents identified mainly as singers/musical performers (60%), followed by non-musical performers (20%) and 16% singer/songwriters.

[7] Please note that this sample is fairly small and may not be fully representative of the entire population.

Figure 8. Performer/Musician Type



Most of them (44%) work in variety shows, followed by decade shows/impersonators (24%), gospel shows (12%) and music shows in the form of cover songs (12%). The remaining 8% work in magic/illusionist shows.

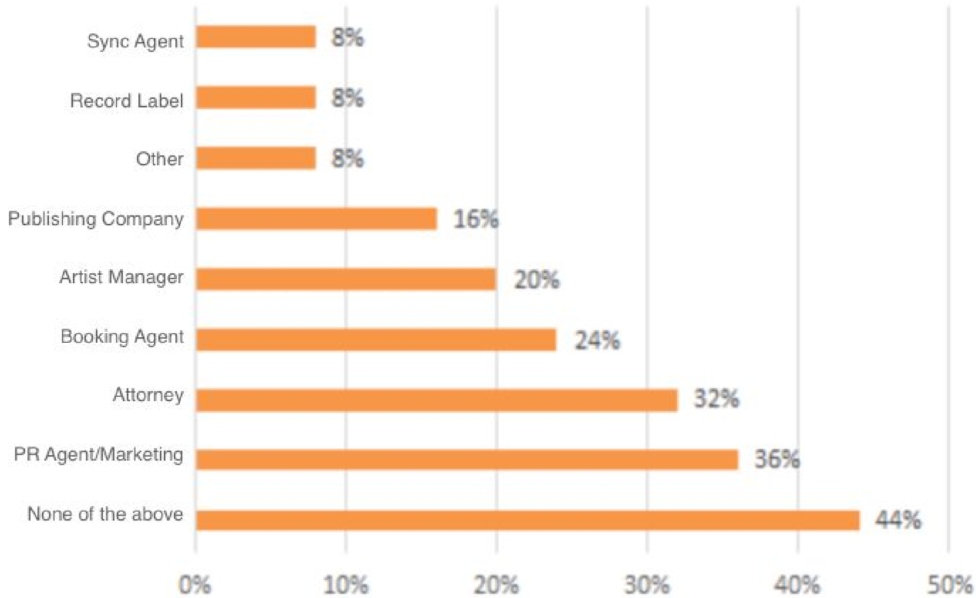
Their main music genre is Country (40%) and Christian & Gospel (32%). This supports the findings of the Branson Theater and Show Owner and Operator Survey. Pop is also a common genre (32%), followed by Rock (28%) and Broadway Show Tunes (24%).

Performances were mainly held in Branson in the past 12 months (152 shows on average), followed by an average of 60 national performances and 29 international performances. This translates into an average of 241 shows per year, 20 performances per month, or 5 per week.

Referring to their employment status, 84% are full-time employees and the rest are part-time employees. Nearly all have performed within the last 12 months, making them an active part of the theater industry's workforce. Most of them (68%) work exclusively as performers with no other jobs on the side, while 20% have another job on the side that is not related to music and the remaining 12% have another job on the side that is music related. This indicates that many work long hours or shifts, considering that the majority are full time employees, yet one in three (32%) still hold additional jobs.

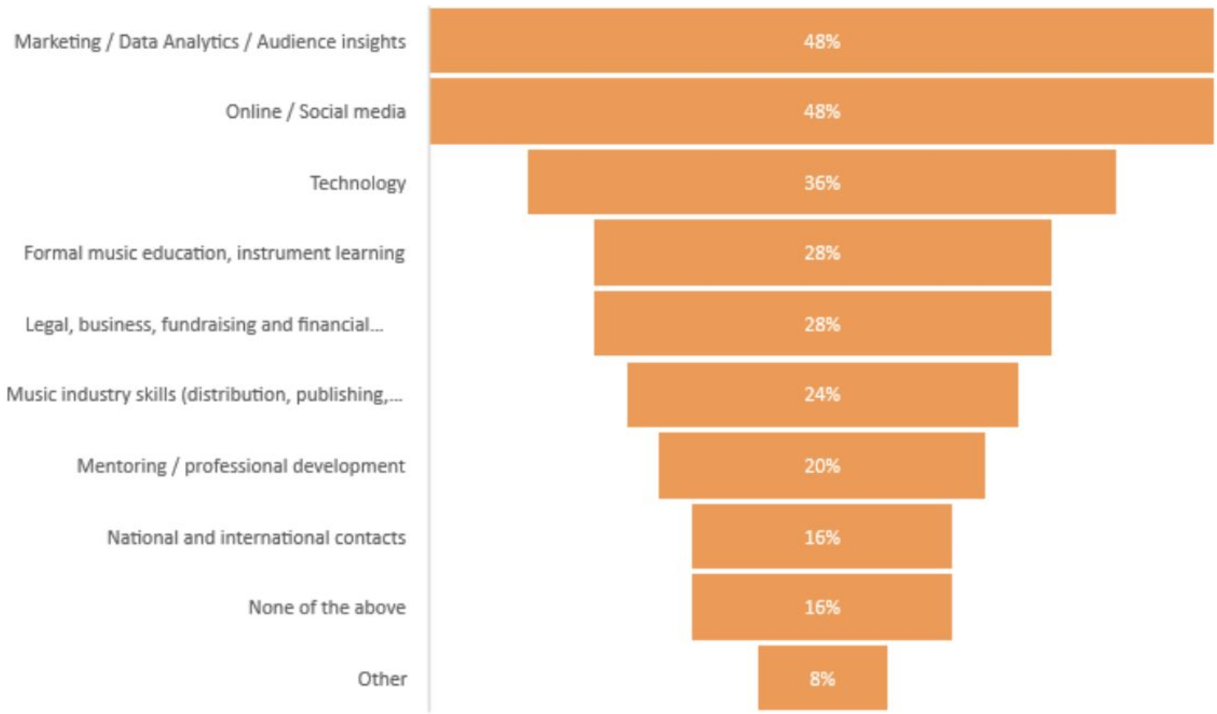
When analyzing support systems, all of the performers have a place to rehearse, with 88% of them doing so at the theater where they perform. In addition, the most common business relationship that performers/musicians in Branson have with other industry agents (Figure 9) are PR agents/marketing (36%), followed by attorneys (32%), booking agents (24%) and artist managers (20%). However, it is notable that nearly half (44%) don't have any business relationships with any other industry agents. This could be due to the fact that most are full-time employees, who may not have a need for booking additional performances/shows and hence do not need any additional support.

Figure 9. Performers/Musician Business Relationships with Other Industry Agents



Finally - and similar to all other industry professionals - Branson's performers and musicians are mostly interested in improving their skills related to marketing/data analytics/audience insights (48%) and online/social media (48%). Other popular mentions were technology (36%), formal music education (28%) and legal/fundraising/finance knowledge (28%) (Figure 10).

Figure 10. Main Skills that Performers/Musicians are Interested in Improving



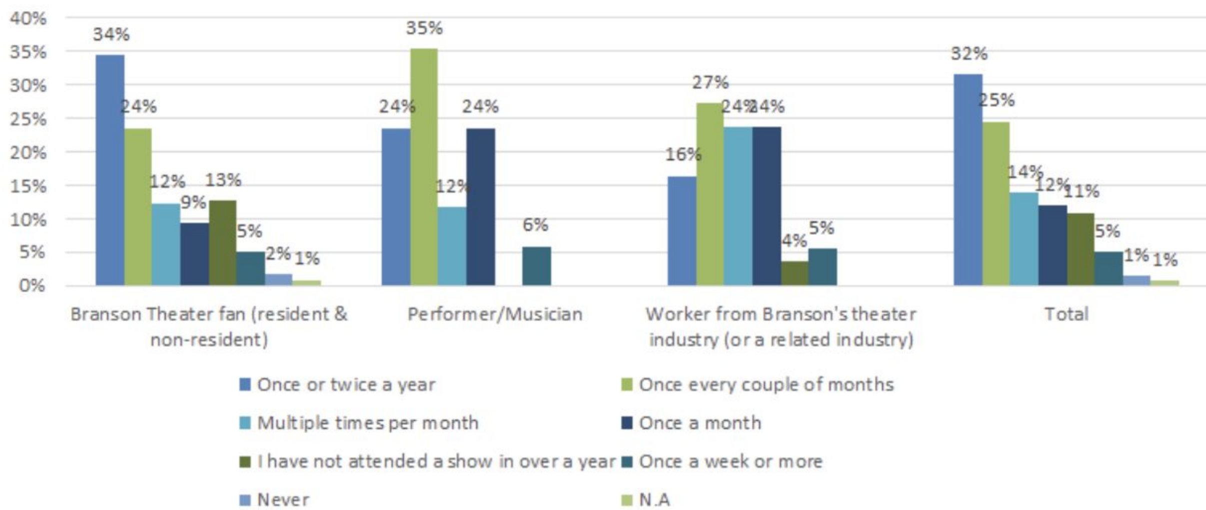
Live Theater Audience Details

The Live Theater Audience Information section targeted Branson's local live theater audience (residents and non-residents). However, industry professionals were also given the opportunity to respond to this section as "fans." Seventeen performers/musicians and 55 other theater industry professionals responded. Findings are based on the input of a total of 340 responses - 190 of whom live in Branson and 150 outside of Branson.

Most of Branson's local theater audience is female (60%), non hispanic or latino(a) (91%) and white (94%). Nearly half (48%) are baby boomers (born between 1946-1964), followed by 29% Gen- Xers (born between 1965 and 1980). Most of them expressed being interested (40%) or very interested (35%) in shows by Branson's live theaters.

While level of interest is generally high, frequency of attendance differs based on the "type" of theater fan (Figure 11). Not surprisingly, audience members who were also performers/musicians or other theater industry professionals attend shows more frequently than others. Those audience members who are not employed by the local theater industry only attend shows once per year (34%).

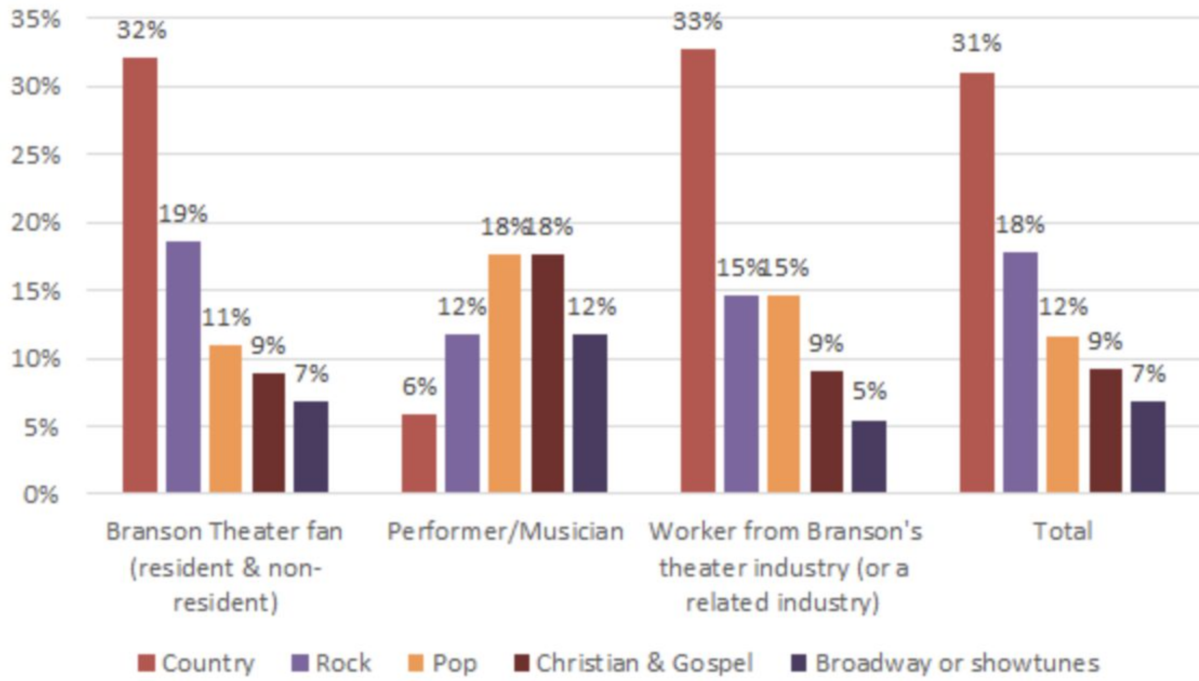
Figure 11. Frequency of Branson Live Theater Show Attendance



The main reasons given for not attending shows more often included feelings that show content is too dated and doesn't appeal to their age group (18%), lack of time (16%), lack of high-quality productions (12%) and high ticket prices (11%). This indicates an opportunity to improve show content and quality in order to increase audience appeal.

The theater audience's favorite show format (Figure 12) is by far variety shows (75%), followed by dinner shows (36%), music shows in the form of cover songs (35%) and music shows in the form of original music (33%). In line with Branson's current product supply, Country music (31%) is the audience's favorite music genre. However, they tend to prefer Rock and Pop over Christian & Gospel and Broadway/Showtunes. This indicates an opportunity to further diversify the existing product to better meet consumer demands.

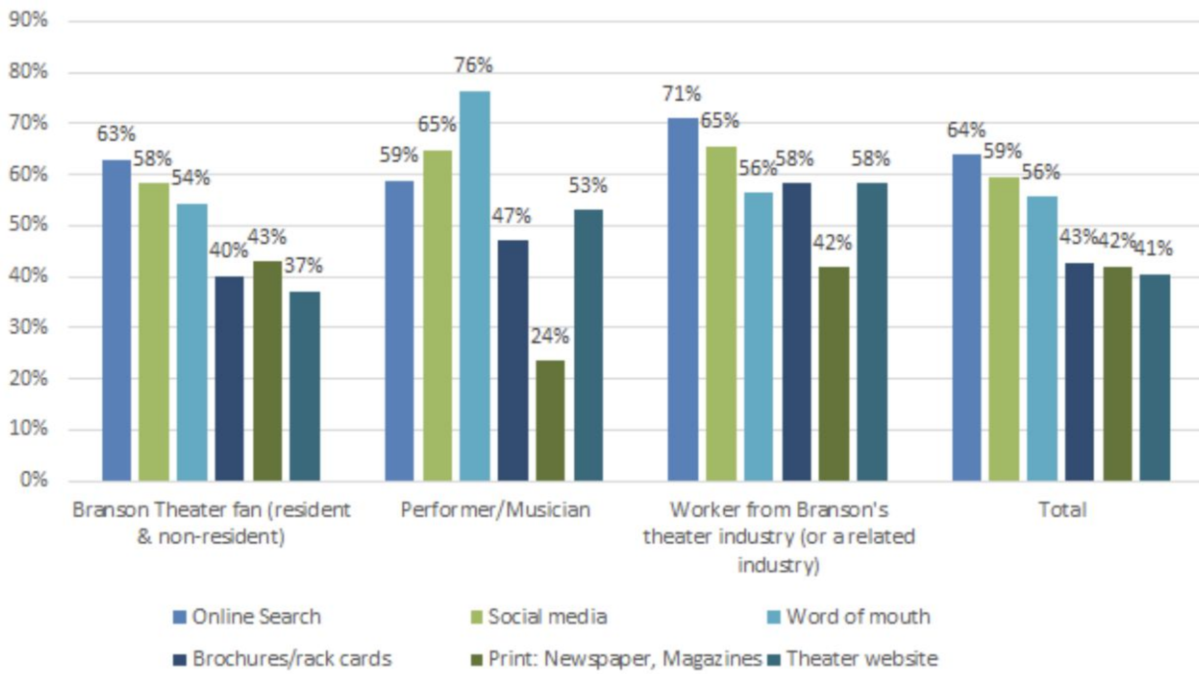
Figure 12. Favorite Music Genres



In addition, it is interesting to know that Branson's local theater audience favorite era of music to listen to is music from the 70's (20%), followed by current music (19%).

When asked how easy it is to find out about current live theater shows in Branson, the majority of the local audience found it easy (42%) or very easy (31%). They tend to find show information through online search (64%) and social media (59%) (Figure 13). However, audience members who are also performers/musicians primarily stay informed through word of mouth (76%). This is likely due to regular contact with other people in Branson's theater industry.

Figure 13. Show Information Channels



Perceptions and Ratings of Branson's Live Theater Ecosystem

We asked all survey participants about their professional opinion related to Branson's live theater ecosystem. As mentioned in the theoretical framework, each individual in the value chain is not only dependent on itself, but also relies on various interactions with others/other aspects.

Feedback of Theater Industry Professionals

When looking at interactions with government support via grants or tax incentives, the survey revealed that hardly any artists/musicians, nor workers from Branson's theater industry (or a related industry) had applied to any grants or tax rebates. Most claimed that they are not aware of what grants were available or that there weren't any tax incentives suitable for them. This indicates an opportunity for the government to improve communication about existing grants/tax incentives or create new avenues for funding support.

This information is also confirmed in the overall ratings provided by industry professionals. As shown in Figure 14, “availability of funding support” received one of the overall lowest scores (2.1 out of 5).

The lowest rated aspect concerned laws/regulations for third party ticket sellers (1.7 rating out of 5). This is in line with findings from Branson’s Theater and Show Owner and Operator Survey, indicating that this is an area of concern which needs to be addressed. Additionally, public transportation to theaters within Branson is another area that could be improved, receiving the second lowest score (1.8 out of 5).

All three of these areas are within the government’s circle of influence, indicating a need to strategically address these aspects of Branson’s live theater ecosystem. Figure 14 also identifies additional aspects related to political factors (P), which would require government action in order to change.

Overall, Branson’s entire live theater industry was rated rather poorly by its local industry professionals/employees, receiving an average score of only 2.6 out of 5. As previously mentioned, there are several improvement opportunities.

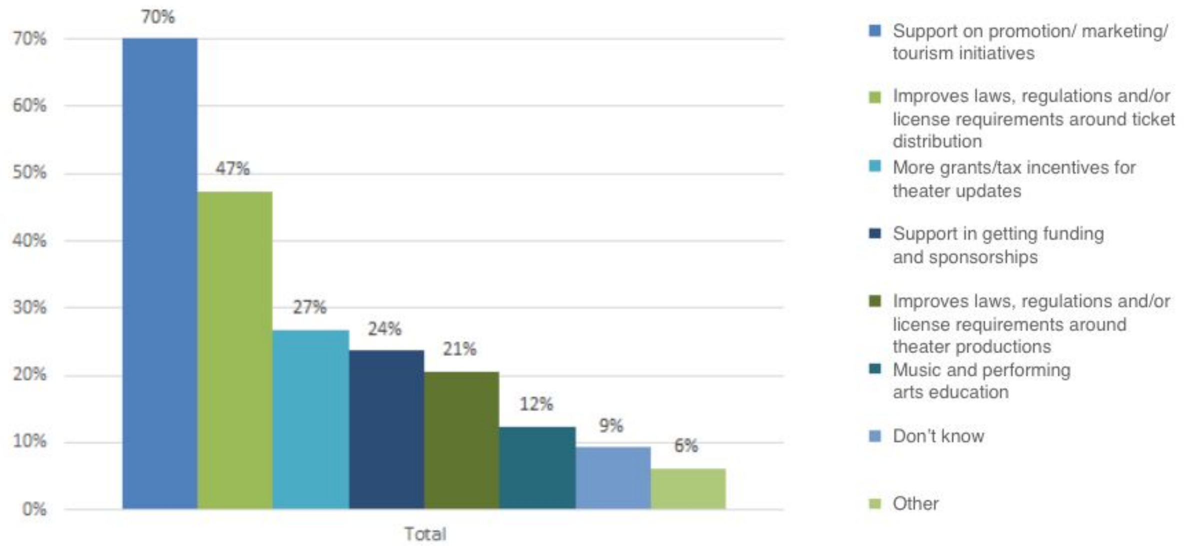
Figure 14. Theater Industry Professionals’ Ratings of Branson’s Live Theater Ecosystem (1 = ‘very poor’ and 5 = ‘very good’)

Aspect	PEST Factor (Political, Economic, Social, Technological)	Average rating		
Low rating	PEST	Performer/Musician	Worker in theater industry	Average
Laws/regulations for ticket resellers	P	1.3	2.1	1.7
Public transportation to theaters within Branson	P	1.9	1.7	1.8
Availability of funding support	P	2.1	2.1	2.1
Collaboration with Branson’s Convention & Visitors Bureau Media coverage of local theater scene	S	2.0 2.0	2.3 2.4	2.2
Networking/showcasing opportunities for artists and theater industry professionals	S	2.0	2.6	2.3
Laws/regulations for live theaters	P	2.1	2.6	2.3
Fair pay for musicians/performers	E	2.4	2.5	2.4

Availability of music- and performing arts education	P/S	2.2	2.8	2.5
Medium rating		Performer/ Musician	Worker in theater industry	Average
Collaboration/sense of community within the live theater scene	S	2.5	2.7	2.6
Performance opportunities for emerging artists Availability of paid musical performance opportunities outside of Branson's theater industry	E	2.5 2.8	2.9 2.7	2.7
Affordability of housing	E	3.4	2.3	2.8
Reputation of Branson as a theater hub	S	3.0	3.1	3.0
Performance opportunities for established artists	E	3.4	3.5	3.4
Parking around theaters	E	3.2	3.7	3.5
High rating		Performer/Musician	Worker in theater industry	Average
Quality of local talent	S	3.4	3.9	3.6

According to the community, improving support on promotion/marketing/tourism initiatives should be prioritized first (Figure 15). Additionally, the community wishes for improved laws, regulations and/or license requirements around ticket distribution, which is in line with how low this aspect is currently rated (rating of 1.7 out of 5, refer to Figure 14). Finally, nearly one in four would like to see an improved financial support system, with 27% saying they wished the city/government offered more grants and tax incentives for theater updates and 24% saying support in getting funding and sponsorships would be helpful.

Figure 15. Areas of Desired City or Government Support



Feedback of Branson's Live Theater Audience

We also asked Branson's live theater audience (residents and non-residents) about their perception of various aspects of the local live theater industry. Figure 16 divides the various aspects into areas to improve due to their lower ratings, and areas to maintain due to their higher ratings. In line with the opinion of Branson's theater industry professionals, public transportation to the theaters was identified as a leading concern, with a 1.1 rating out of 5.

Figure 16. Audience Ratings of Branson's Live Theater Ecosystem
(1 = 'very poor' and 5 = 'very good')

Aspect	PEST Factor (Political, Economic, Social, Technological)	
Lower ratings	PEST	Average Rating
Public transportation to theaters within Branson	P	1.1
Late evening/night dining options	E	2.3

Ticket prices	E	2.8
Higher ratings		Average Rating
Safety in theaters	T	4
Branson's musical heritage	S	3.9
Safety around theaters	P	3.8
Sound quality of theaters	T	3.7

These findings demonstrate that the factors that surround the performing arts value chain highly depend on stakeholder support, such as funding. In addition, the value chain's distribution step is generating hurdles for Branson's theater industry related to high prices and inadequate or missing regulations for third party ticket sellers.

Next Steps

In addition to this General Music and Theater Industry Survey, Sound Diplomacy collected feedback from theater industry stakeholders and visitors through two additional surveys: One addressed specifically to theater and show owners and operators, and another one addressed to past Branson visitors. The results of these three surveys inform the social and economic context of the live theater ecosystem in Branson. Findings from all three surveys will guide our final strategic recommendations. They will be summarized and presented with other research as part of the final report.