



Branson Theatre Industry Study

Visitor Survey Analysis

Branson/Lakes Area Chamber of Commerce and CVB

Introduction

Objective

The purpose of the Branson Visitor Study was to gain intelligence from past visitors regarding their perception of Branson's live theater industry. The main goal was to better understand consumer behavior and how it might impact the success of Branson's live theater industry. Areas covered were:

- Reason and frequency of visits
- Show attendance
- Perceptions of Branson's live theater industry
- Decision making
- Interests and preferences
- Demographics

Methodology

An online survey was distributed to a sample of past visitors, who had visited Branson, Missouri between 2015 and 2019. The survey was developed by Sound Diplomacy in collaboration with the Branson / Lakes Area Chamber of Commerce & the Branson Convention & Visitors Bureau (CVB). The survey was distributed by H2R Market Research to their database of past visitors. The database is a collection of visitor intercepts, which are continuously collected by H2R Market Research at multiple locations across Branson throughout the year (all 12 months).

The survey was approximately ten minutes long and conducted from 12/18/19 to 1/5/20. No incentive was provided to the participants. A total of 647 responses were collected. The 647 completes provide a margin of error of +/- 3.81% at the 95% confidence level.

Reporting

Results are reported in full, but also compared by motivation to visit as well as age group. Differences are reported where applicable. However, it is important to note that sample sizes varied between groups. Some sample sizes were too small to produce valid data and

consequently had to be omitted from the comparison (e.g., millennials, Gen Z, outdoor enthusiasts, etc.).

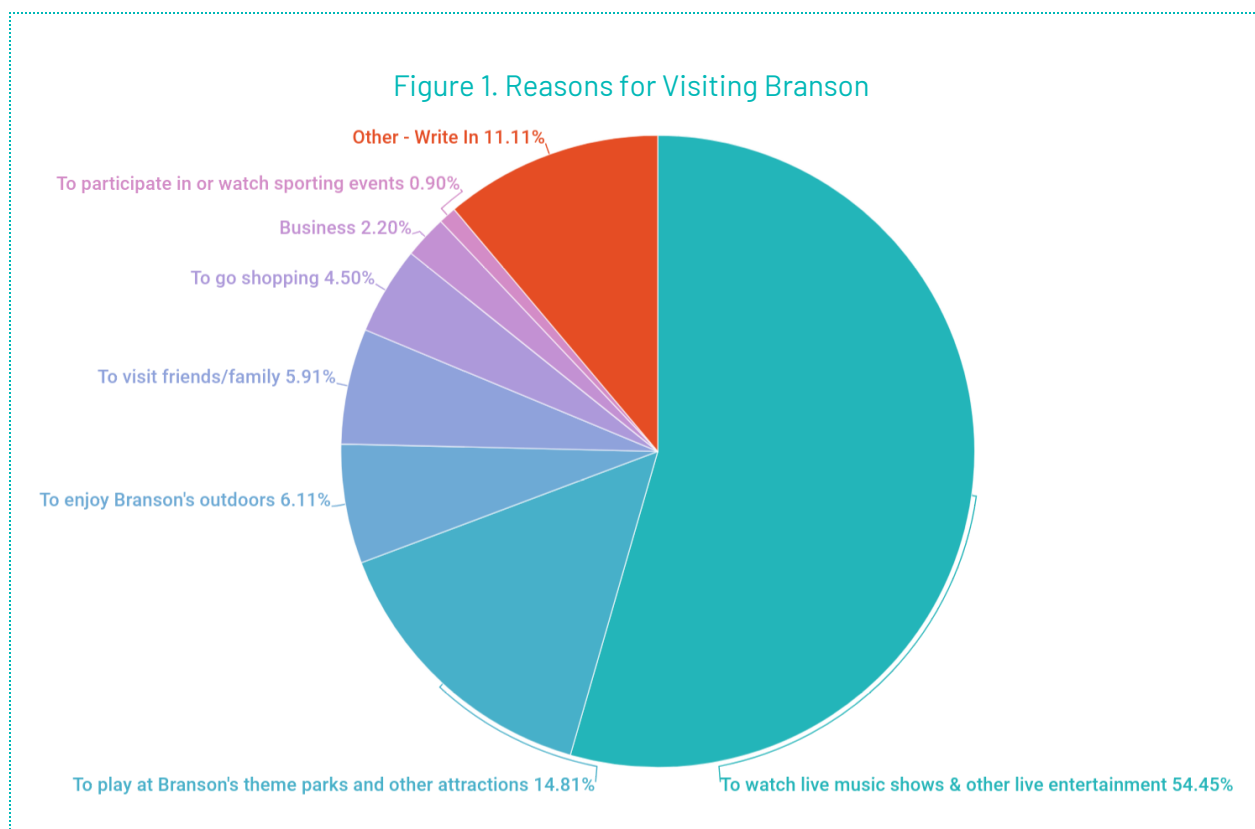
Executive Summary

- Overall, live theater entertainment still drives visitation in Branson. Interest in live shows remains high and visitors generally rate Branson's live theater industry highly.
- The older generations - traditionalists and baby boomers - are the theaters' core audience, attending more shows than their younger counterparts (Gen-X).
- The average Branson visitor attends two to three shows during their Branson visit. Lack of time, high ticket prices and choosing other, more fun things to do were the main reasons for not attending more shows.
- Those who visit primarily for Branson's theme parks and attractions are less interested in theaters. They attend considerably fewer to no shows at all.
- The quality of the performers, ticket price and originality of show content are what's most important to visitors when deciding on a show. And in terms of show format, visitors prefer variety shows, dinner shows and music shows in the form of original content (vs. cover songs).
- Country, Christian/Gospel and Rock are the genres of choice - with Gen-X and baby boomers leaning more toward Rock than their older counterparts.
- Each generation prefers the music with which they grew up. Traditionalists enjoy music from the 50's or older, baby boomers enjoy music from the 60's the most and Gen-X prefer music from the 80's. The theaters' core audience leans more toward oldies, while those who visit Branson for its theme parks and attractions lean more toward current music.
- Venue size matters: Visitors prefer medium sized venues (350 - 999 capacity) and small, intimate venues (up to 350 capacity). On the other hand, very large venues (2,000+ capacity) or bar-type venues are undesired. Seat comfort is important, while being able to purchase and consume alcohol during a show is not as important to Branson's visitors.

Detailed Analysis

Visitation

Branson's live theater industry continues to be the main driver for visitation. When asked what the main reason for visiting Branson was on their most recent trip, more than half (54.4%) said "to watch live music shows and other live entertainment." None of the other options came close to that number. The second strongest driver were Branson's theme parks and other attractions (14.8%). And only about one in twenty said that Branson's outdoors (6.1%), visiting friends and family (5.9%) or shopping (4.5%) were the main reason for visiting (Figure 1).



The majority of respondents were recent visitors. More than three quarters (78.5%) had visited Branson within the last 12 months, followed by 13.3% who visited within the last 24 months (Figure 2). They are also frequent visitors, with close to half (44.8%) stating that they visited Branson six or more times in the past five years, followed by 31.8% who visited three to five times during that same time period (Figure 3).

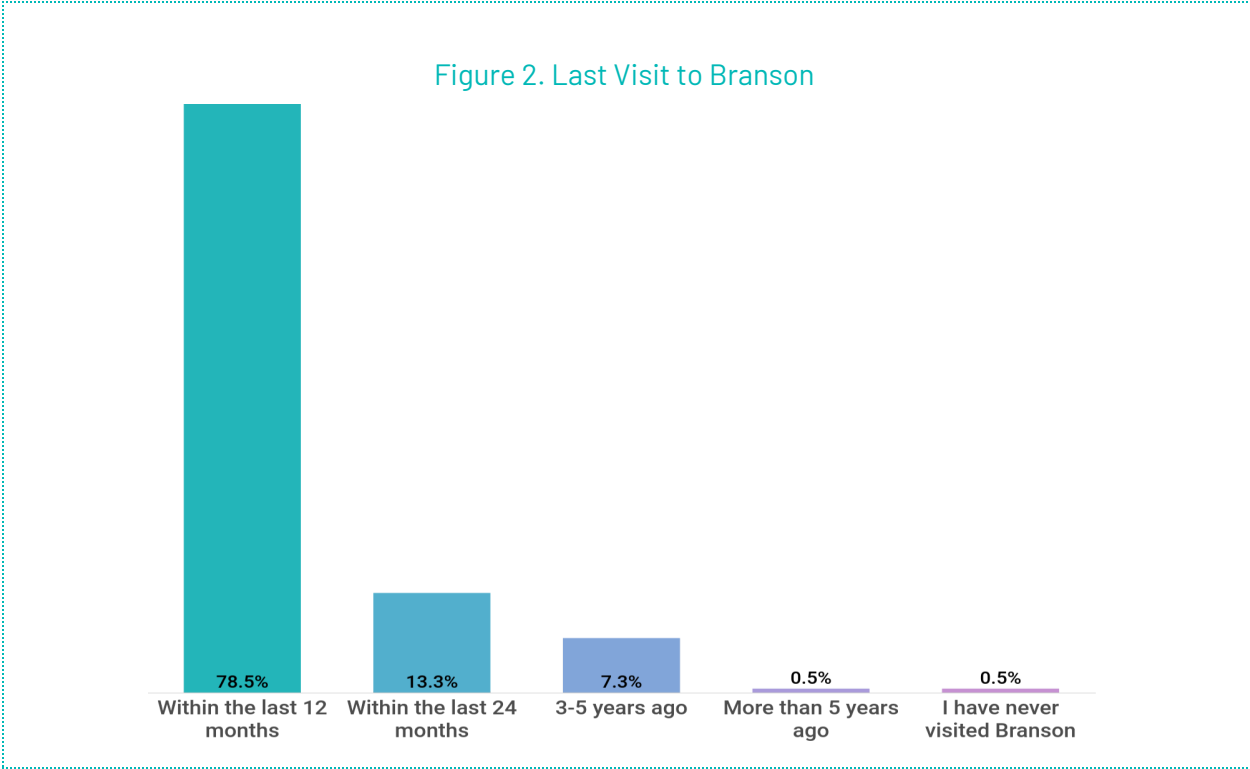


Figure 3. Frequency of Visits in the Past Five Years

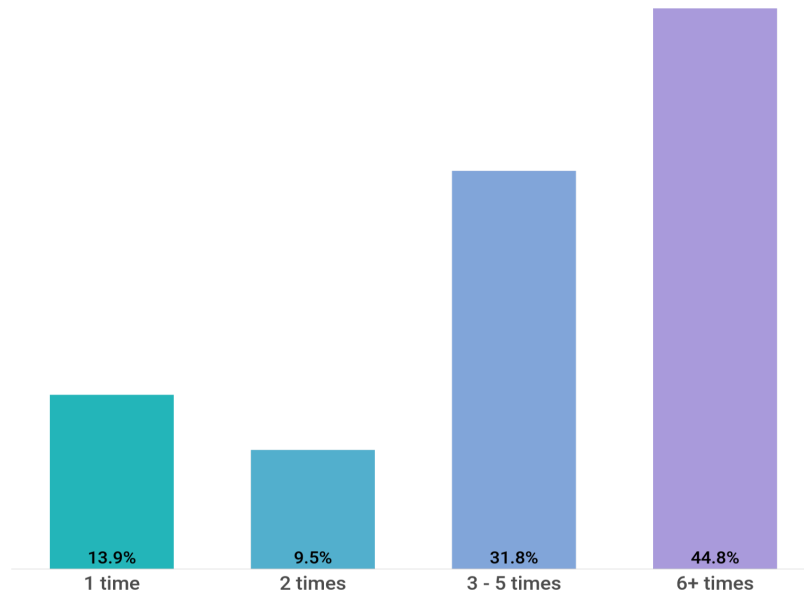
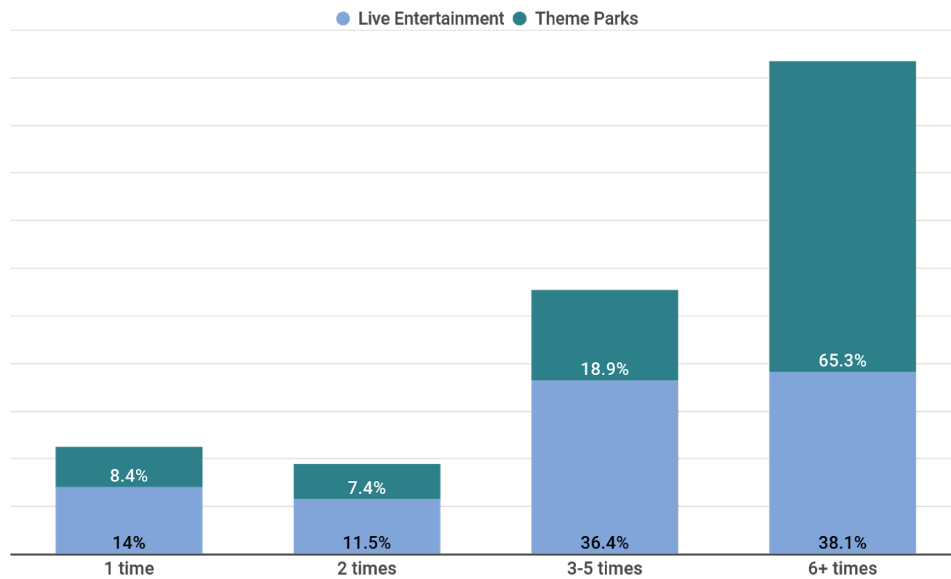
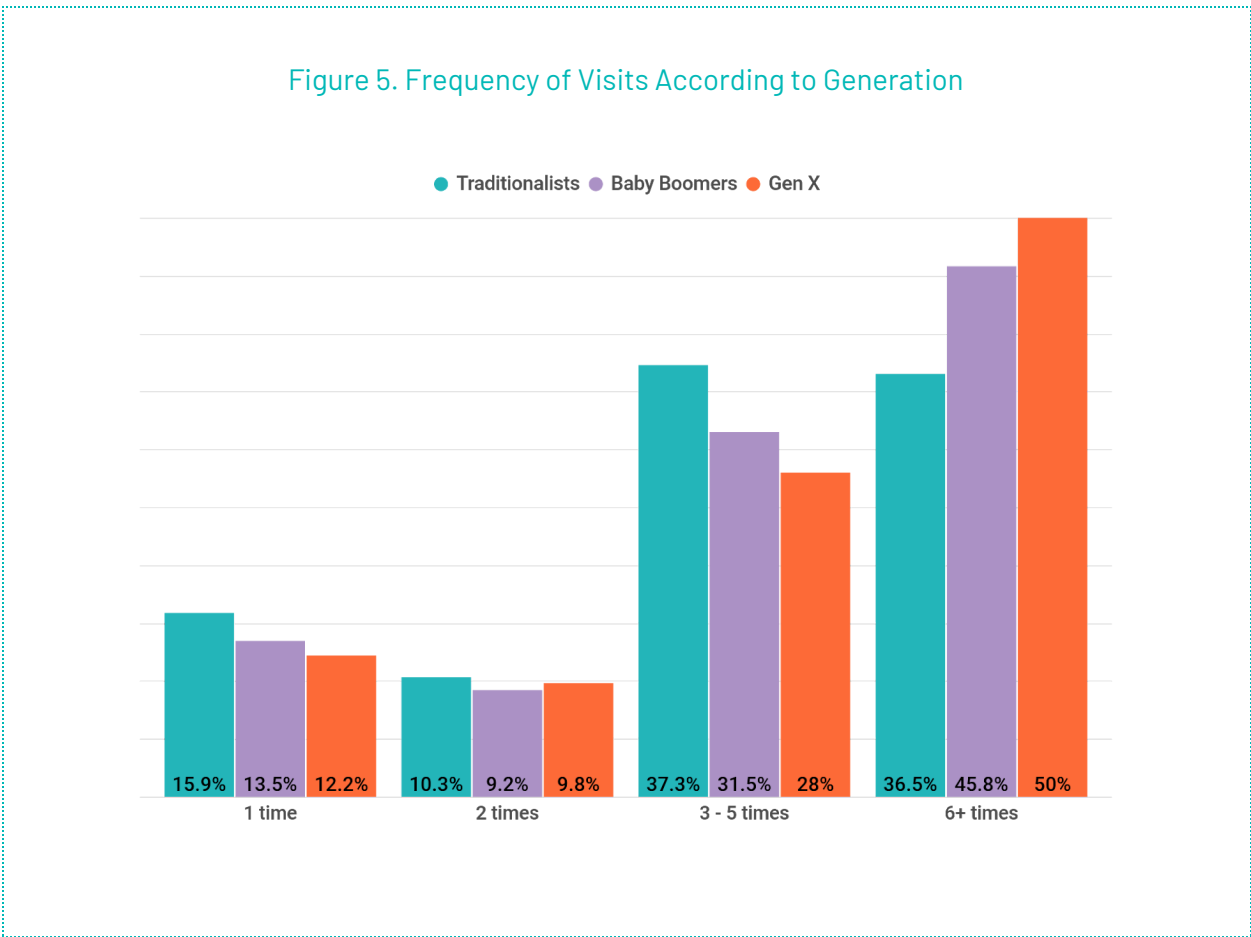


Figure 4. Frequency of Visits According to Main Visit Reason



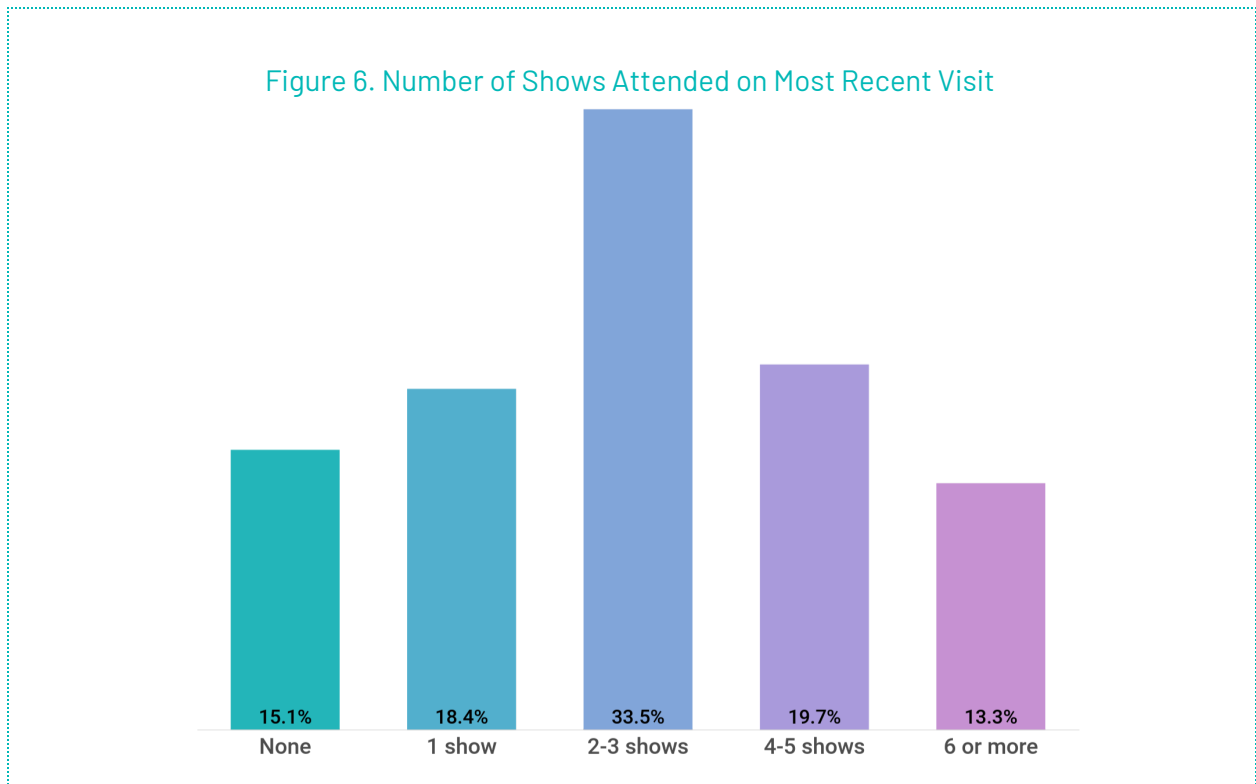
When comparing visitation of those that cited live music shows/live entertainment as their main reason for visiting (n=349) to those that cited Branson’s theme parks and attractions as their main reason (n=95), we found that a larger percentage of attractions-motivated visitors (65.3%) visited six or more times in the past five years than those that came specifically for live-entertainment (38.1%) (Figure 4).

More frequent visitation also increases with younger age. Fifty percent of Gen-X (n=82) visited Branson six or more times in the past five years, compared to 45.8% of baby boomers (n=376) and 36.5% of traditionalists (n=127) (Figure 5).

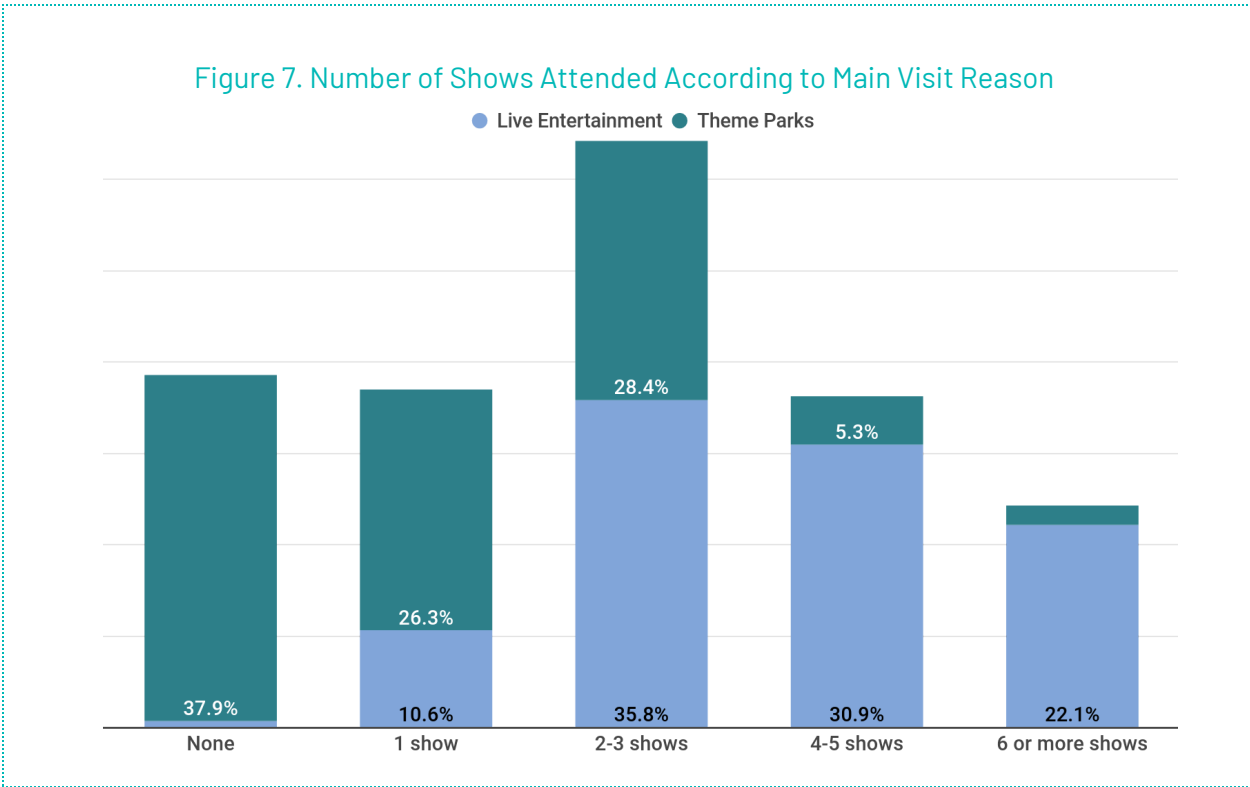


Show Attendance

When asked how many live theater shows respondents attended on their most recent trip, one in three (33.5%) said two to three shows, followed by one in five attending four to five shows (19.7%). But another one in five also just attended one show (18.4%) (Figure 6).

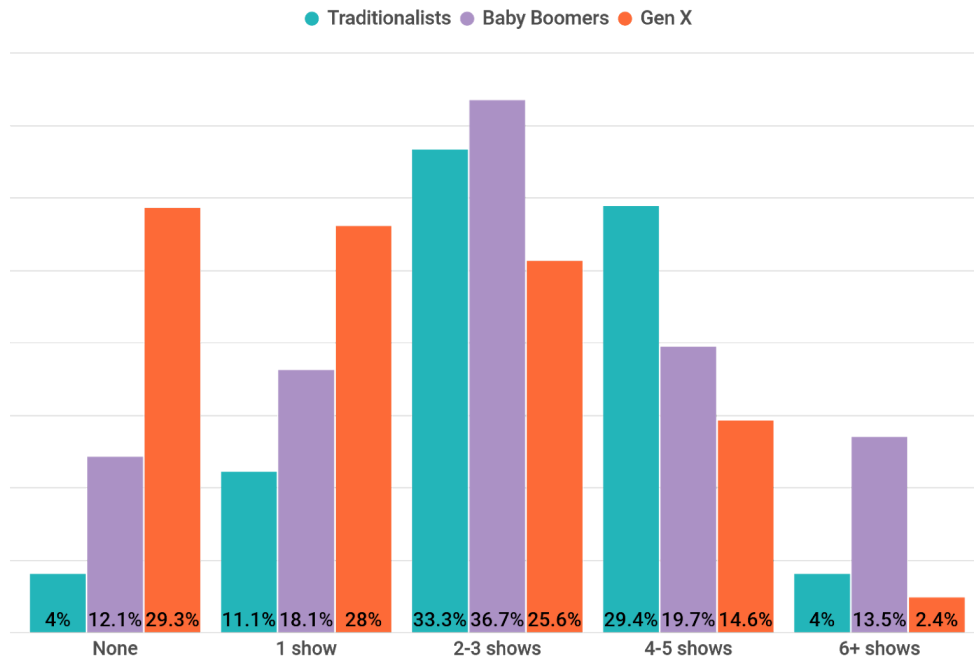


Not surprisingly, visitors who came to Branson specifically for live music shows/live entertainment attended more shows than those who came primarily for the theme parks and attractions (Figure 7). More than half (53%) of show-motivated visitors saw four or more shows on their most recent trip, while 37.9% of attractions-motivated visitors saw no shows at all, followed by another 26.3% who saw only one show.



Show attendance also decreased with age (Figure 8). Nearly one in three Gen-Xers (29.3%) cited not having attended any shows at all on their most recent Branson visit compared to only 12.1% baby boomers or 4% traditionalists. Two to three shows seems to be the sweet spot for the older generations: 33.3% traditionalists and 36.7% baby boomers.

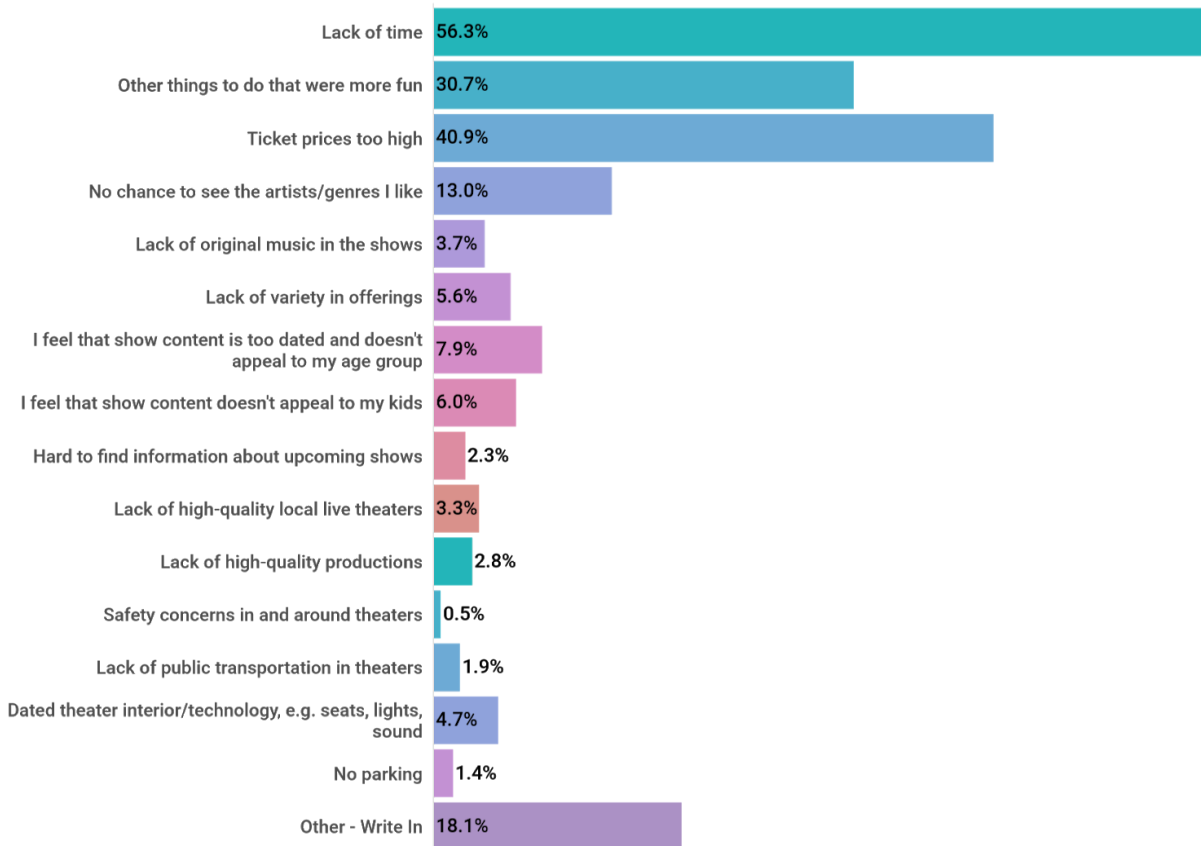
Figure 8. Number of Shows Attended According to Generation



The top three reasons for not attending more live theater shows were lack of time (56.3%), ticket prices that were too high (40.9%) or simply choosing other things they considered to be more fun (30.7%). Approximately one in ten also stated that Branson didn't offer the artists or genres they liked (13%) or that they felt show content was too dated and didn't appeal to their age group (7.9%) (Figure 9).

The top three reasons for not attending more shows remained the same across the different age groups and regardless of reason to visit Branson. However, considerably more of the theme park and attractions motivated visitors cited "other things to do that were more fun" as a leading reason not to attend more shows compared to those visitors that came to Branson primarily for its live show entertainment (36.1% vs. 10.3%, respectively).

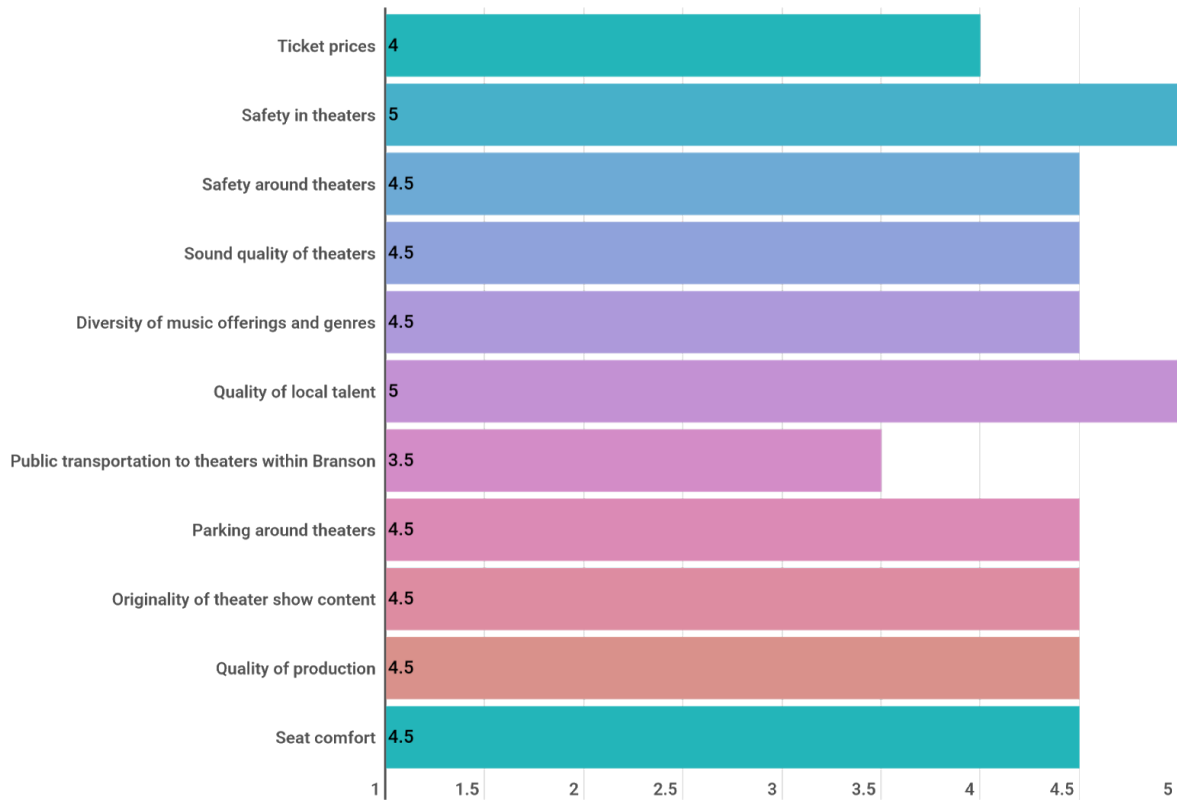
Figure 9. Reasons for Not Attending More Shows



Perceptions

Overall, visitors highly rated Branson's live theater industry (Figure 10). When asked to rate a series of attributes related to Branson's live theater industry on a scale of 1 to 5 with 1 star meaning "very poor" and 5 stars meaning "excellent," most attributes received four to five stars. Safety in theaters and quality of local talent received the highest ratings (5 stars). Visitors were happy with ticket prices, the overall diversity of music offerings and genres, the originality of the show content, the quality of the productions, the sound quality of theaters, the seat comfort, safety around theaters and parking around the theaters (4.5 stars for all). Only public transportation to Branson's theaters received a slightly lower rating (3.5 stars).

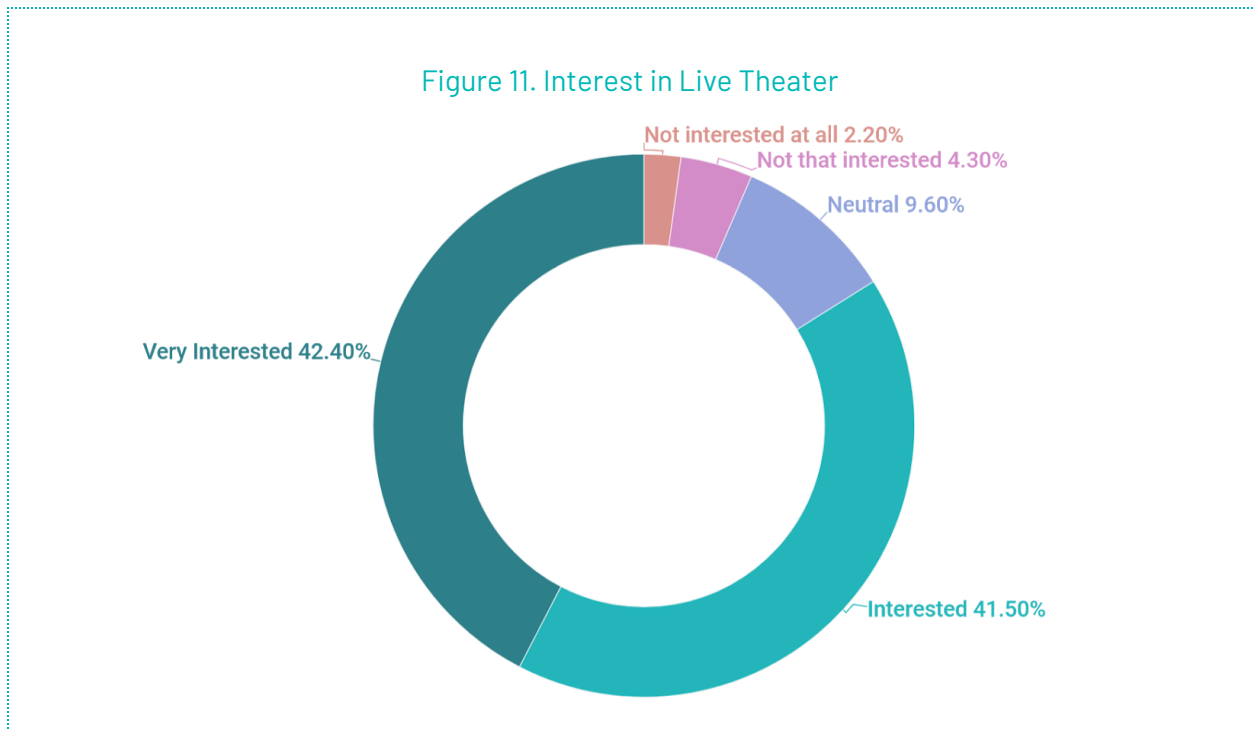
Figure 10. Ratings of Branson's Live Theater Industry



All of the above attributes were also highly rated across all age groups and regardless of people's motivation to visit Branson.

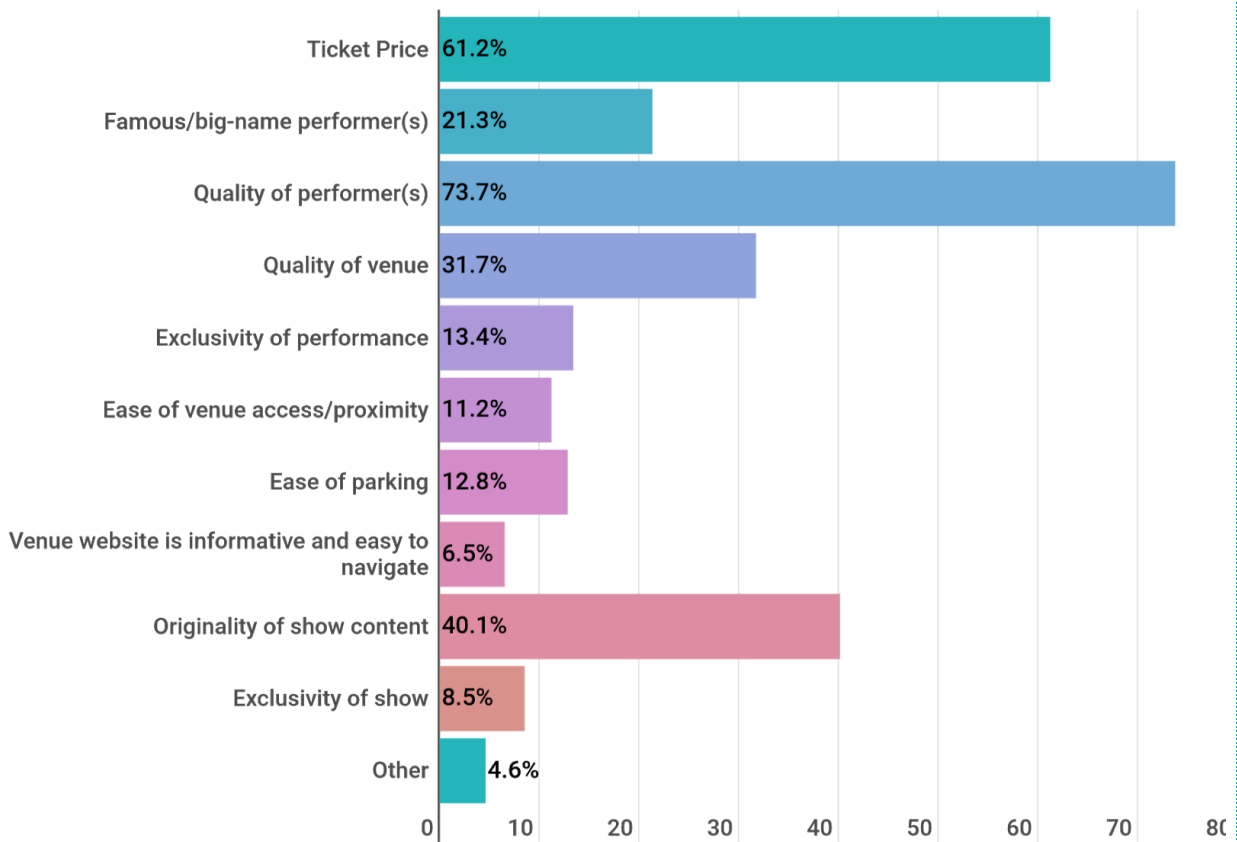
Decision Making

Interest in live theater remains high, with the majority of visitors (83.9%) stating that they are either interested or very interested in shows by Branson live theaters (Figure 11). This is also true for visitors who primarily came to see live entertainment (93.6%) as well as those who visited for the theme parks and attractions (71.5%).



The top three most important factors when deciding on a show were quality of the performers (73.7%), ticket price (61.2%) and originality of show content (40.1%) (Figure 12). One in three also decide based on the quality of the venue (31.7%) and one in five look for famous/big-name performers (21.3%). These leading deciding factors were the same across all age groups and regardless of a visitor's main reason to visit Branson.

Figure 12. Most Important Factors When Deciding on a Show

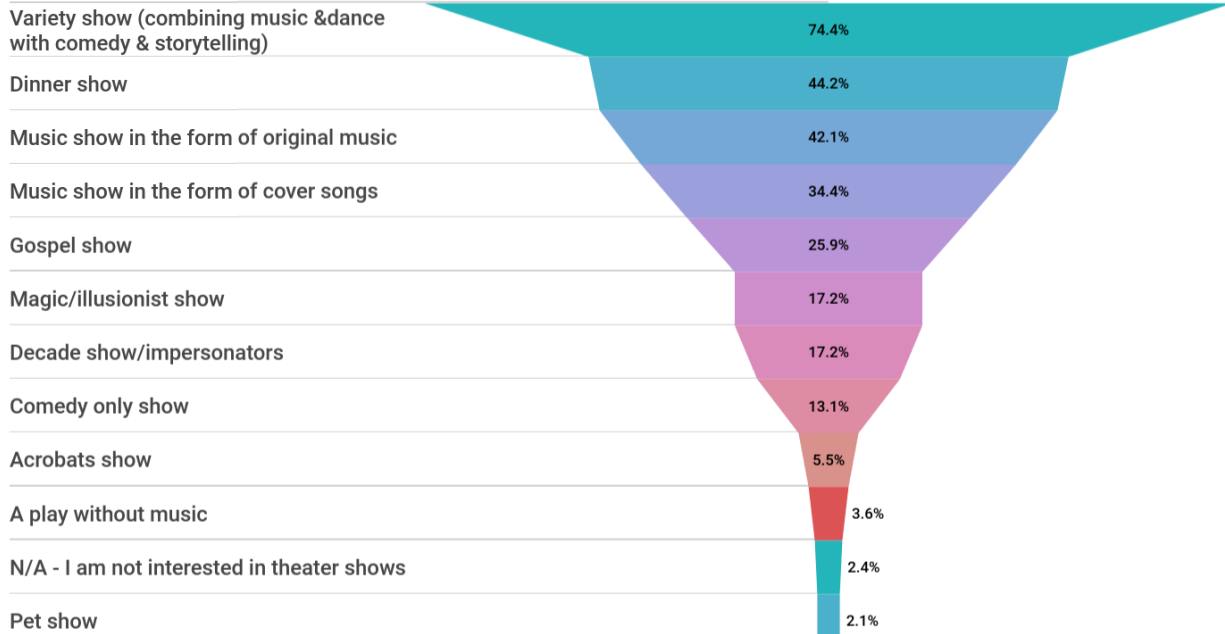


Interests and Preferences

Music and Show Format

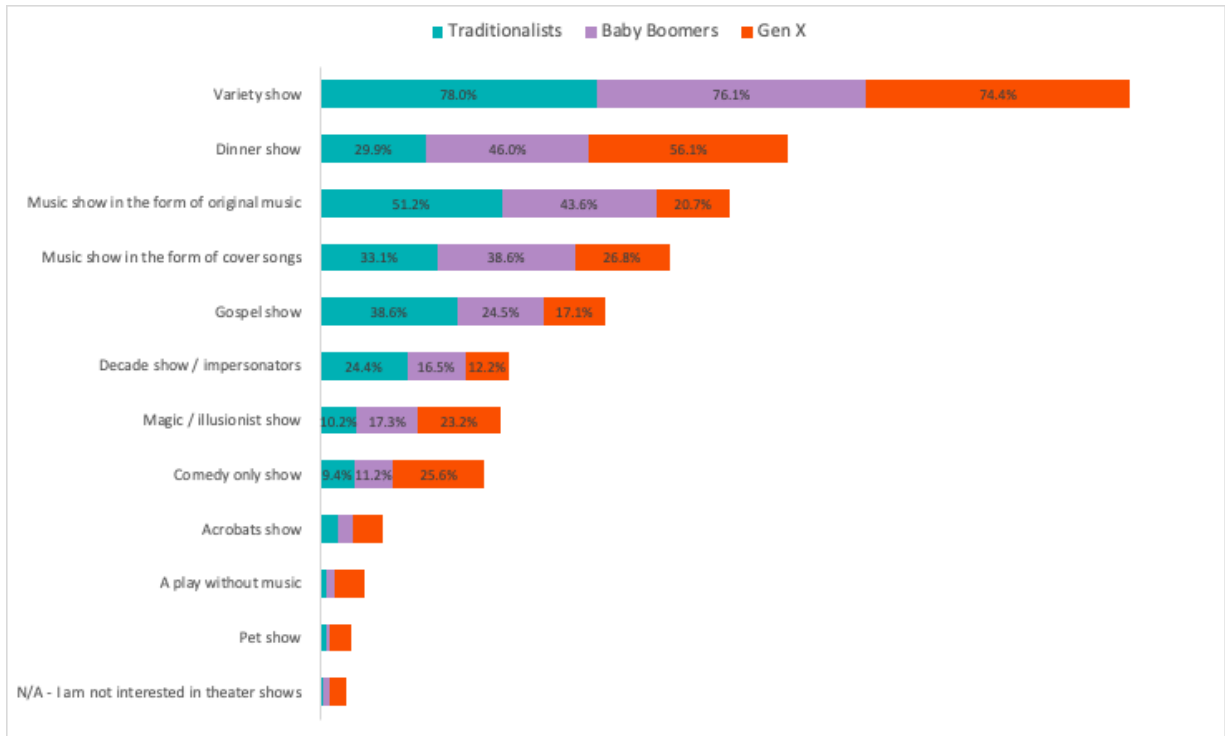
Regardless of reason to visit, all visitors' top three favorite theater show formats include variety shows (74.4%), dinner shows (44.2%) and music shows in the form of original content (42.1%) (Figure 13). Generally speaking, visitors prefer music shows in the form of original content (42.1%) over music shows in the form of cover songs (34.4%). However, visitors who came to Branson primarily for its theme parks and attractions like both formats equally (30.8%). Pet shows (2.1%), plays without music (3.6%) and acrobats shows (5.5%) were visitors' least favorite formats.

Figure 13. Favorite Theater Show Format

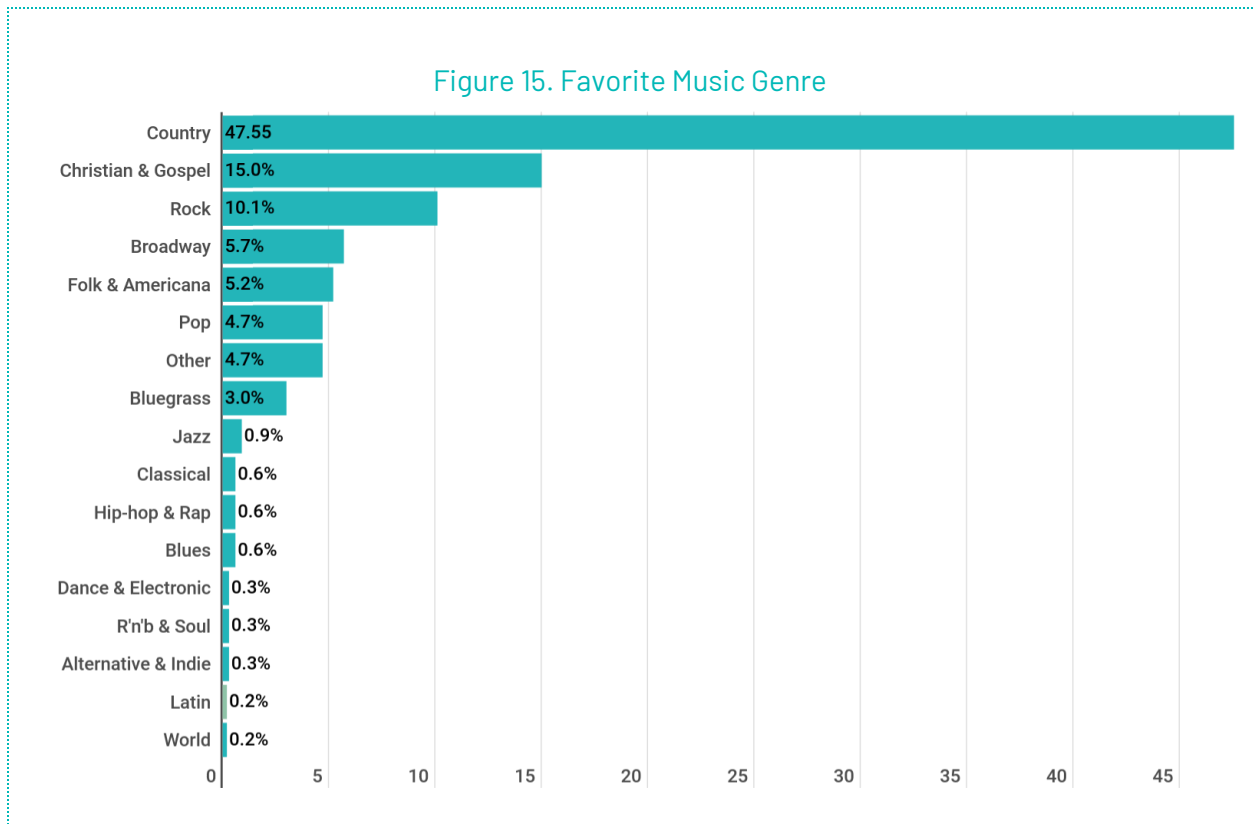


When comparing show format preference between the different age groups (Figure 14), an overwhelming three quarters of all three generations say that variety shows are their absolute favorite (78% traditionalists, 76.1% baby boomers and 74.4% Gen-X). Gen-X like dinner shows more than baby boomers or traditionalists do. On the other hand, traditionalists favor music in the form of original music and gospel shows more than the other two generations and baby boomers enjoy music in the form of cover songs more than the other two generations, yet the format is still not in their top three choices.

Figure 14. Favorite Theater Show Format According to Generation

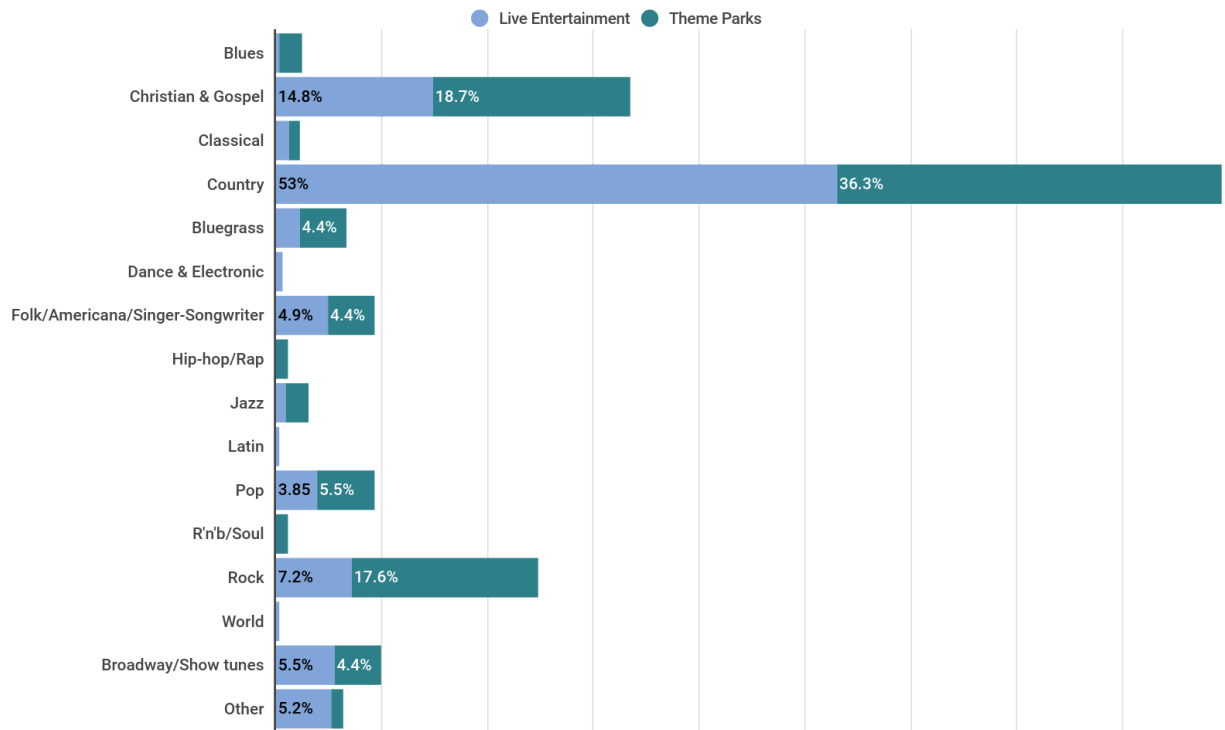


In terms of music genre (Figure 15), Country was a clear visitor favorite and chosen by nearly half of all visitors (47.5%). Christian and Gospel (15%) and Rock (10%) came in second and third. On the other hand, Latin (0.2%), World (0.2%), Alternative/Indie (0.3%), Dance/Electronic (0.3%) and R'n'B/Soul (0.3%) came in last.



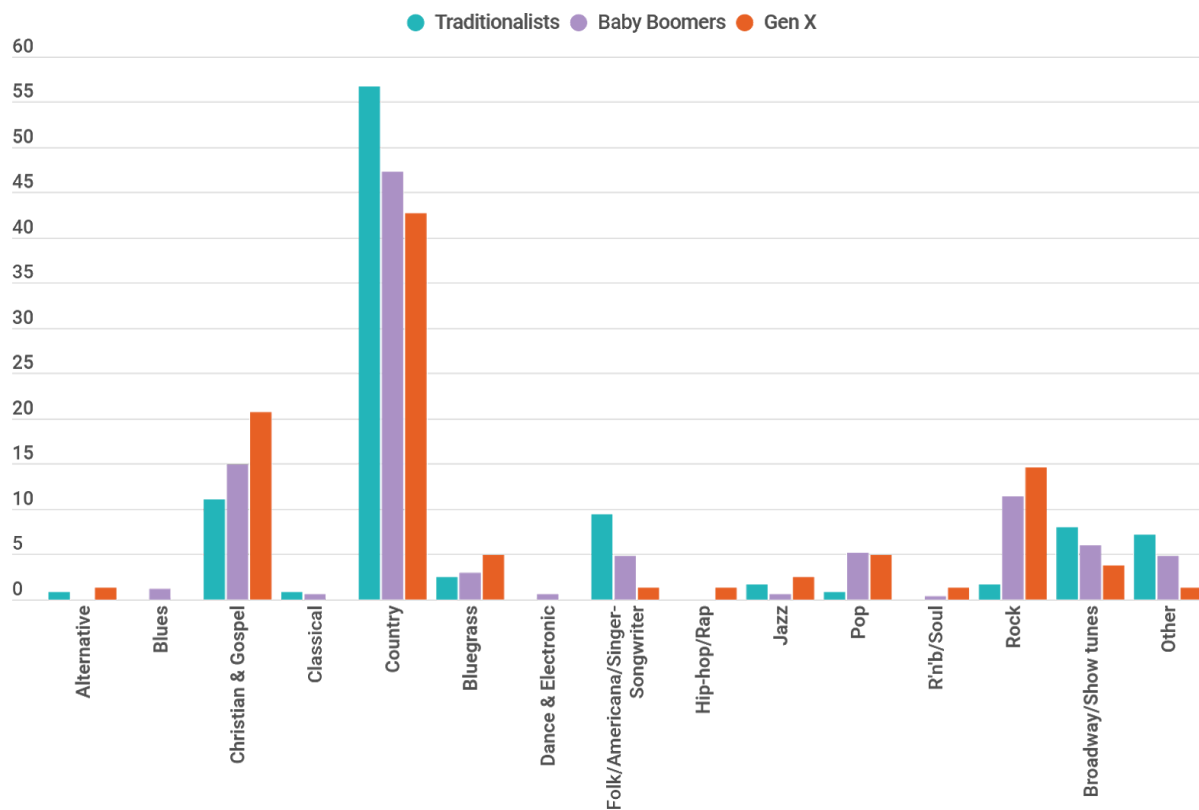
While the order of preference for the various genres remained the same regardless of reason to visit, percentage distribution changed (Figure 16). Those who visited Branson primarily to attend live shows like Country significantly more than those whose visit was motivated by theme parks and attractions (53% vs. 36.3%, respectively), while they like Rock significantly less (7.2% vs. 17.6%, respectively).

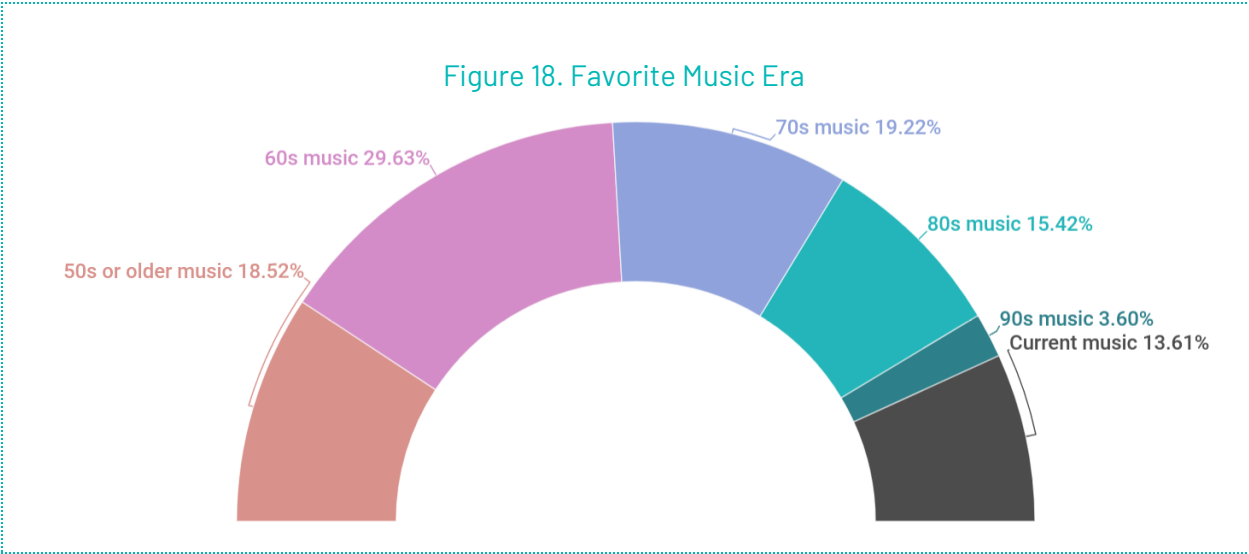
Figure 16. Favorite Music Genre According to Main Visit Reason



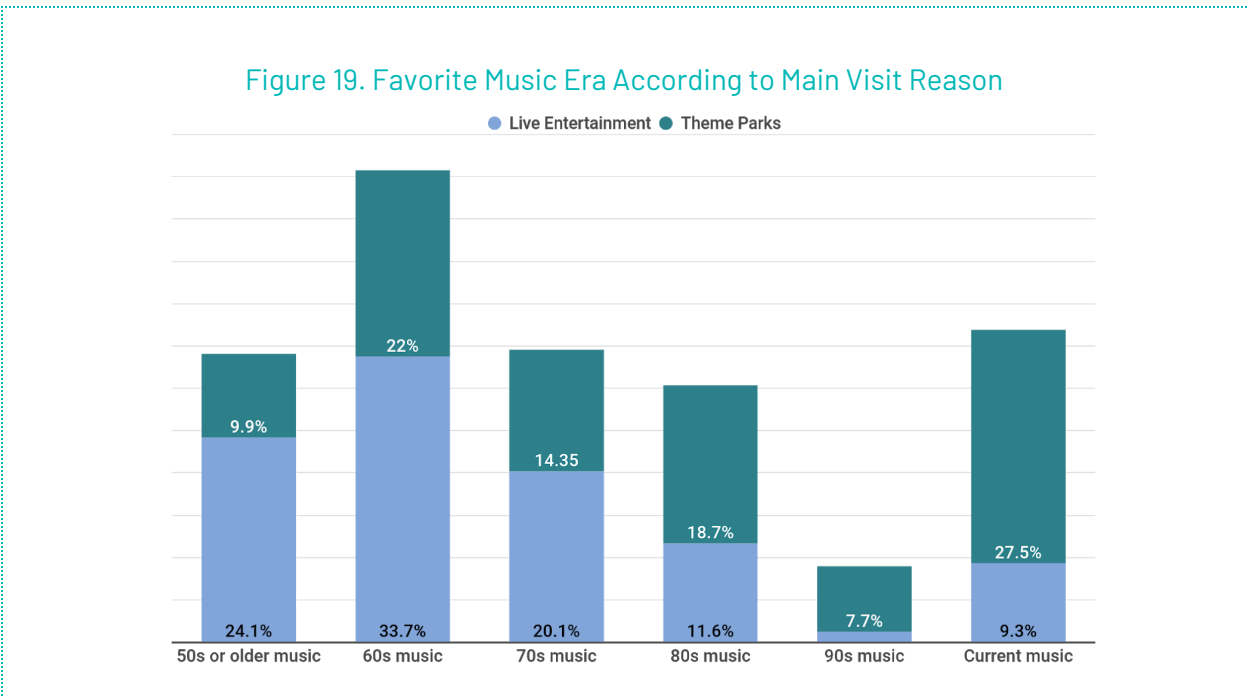
When comparing age groups (Figure 17), Country remained a clear favorite for all three generations 56.7% (traditionalists, 47.3% baby boomers and 42.7% Gen-X). However, baby boomers and Gen-X like Rock considerably more than traditionalists do, while traditionalists like Folk/Americana/Singer-Songwriter music considerably more than the other two generations.

Figure 17. Favorite Music Genre According to Generation



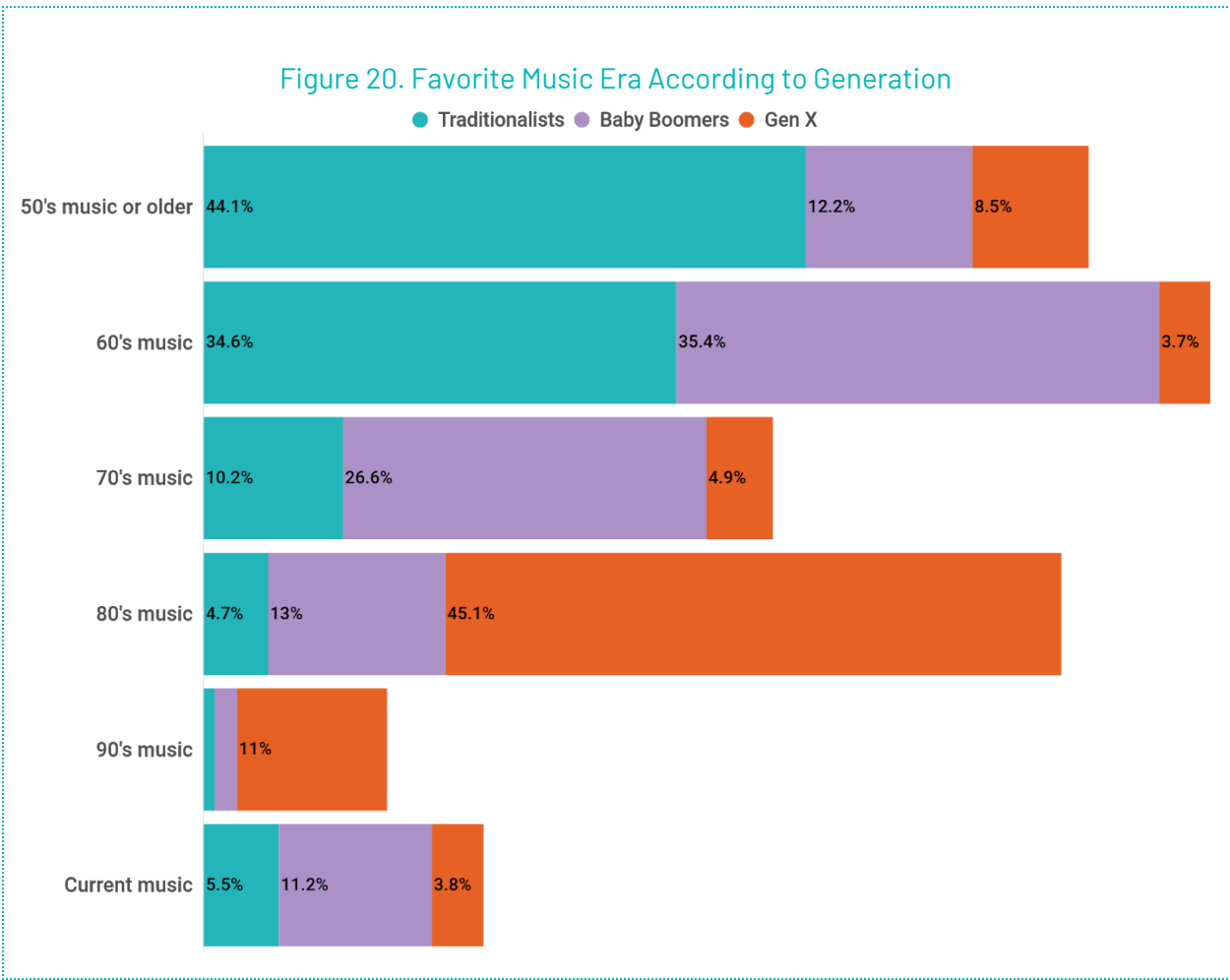


Approximately one third of visitors said music from the 60's is their favorite (29.6%), followed by music from the 70's (19.2%) and music from the 50's or older (18.5%). On the other hand, only about one in ten is interested in current music (13.6%) and music from the 90's was the least favorite (3.6%) (Figure 18).

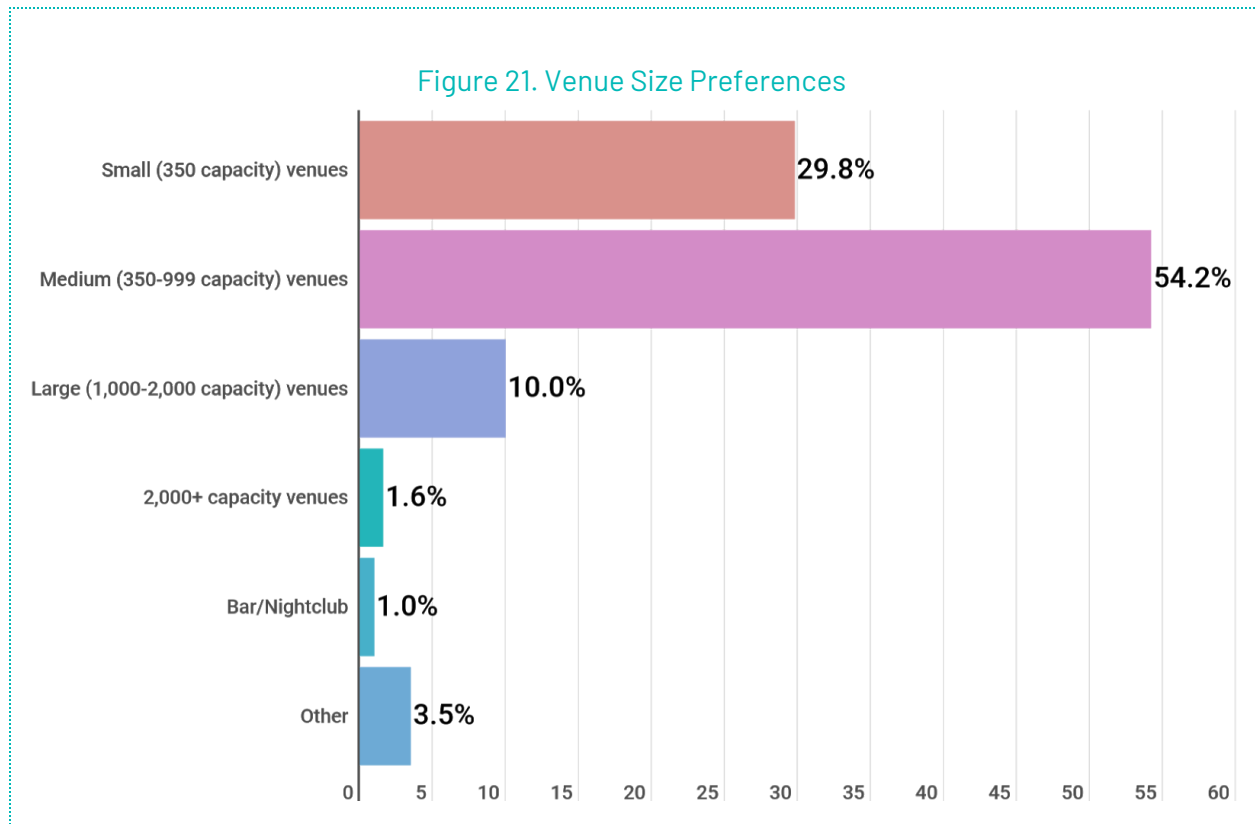


However, musical interests change with visitors' primary reason for visiting (Figure 19). Those who came to Branson primarily for the live shows prefer older music (from the 50's, 60's and 70's). On the other hand, Branson's theme park and attractions enthusiasts prefer current music (27.5%), followed by music from the 60's (20%) and music from the 80's (18.7%).

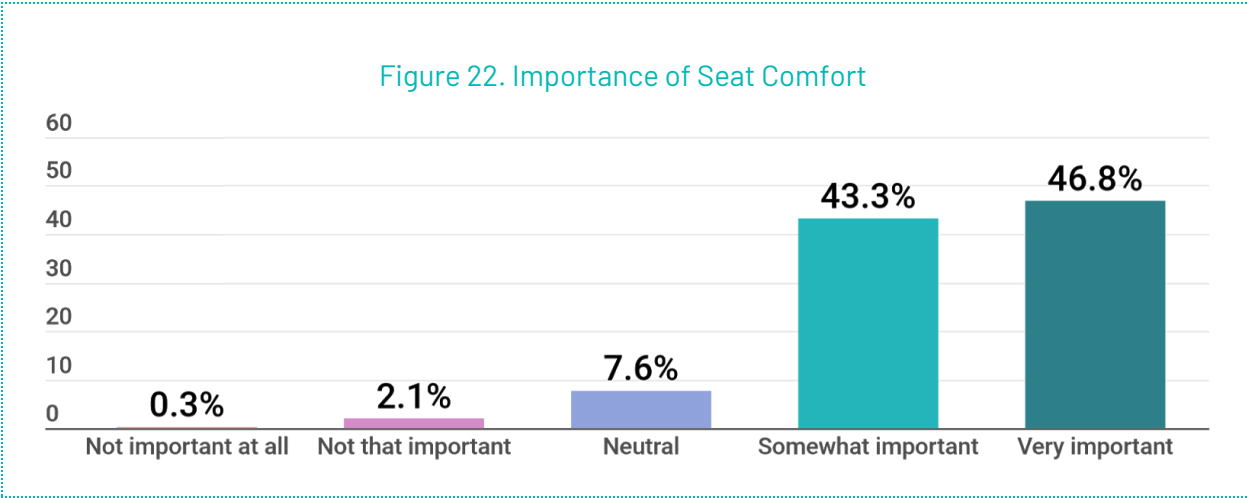
Musical interests also vary between age groups (Figure 20). It is safe to say that each generation prefers the music with which they grew up. Traditionalists enjoy music from the 50's or older the most (44.1%), baby boomers enjoy music from the 60's the most (35.4%) and Gen-X prefer music from the 80's (45.1%).



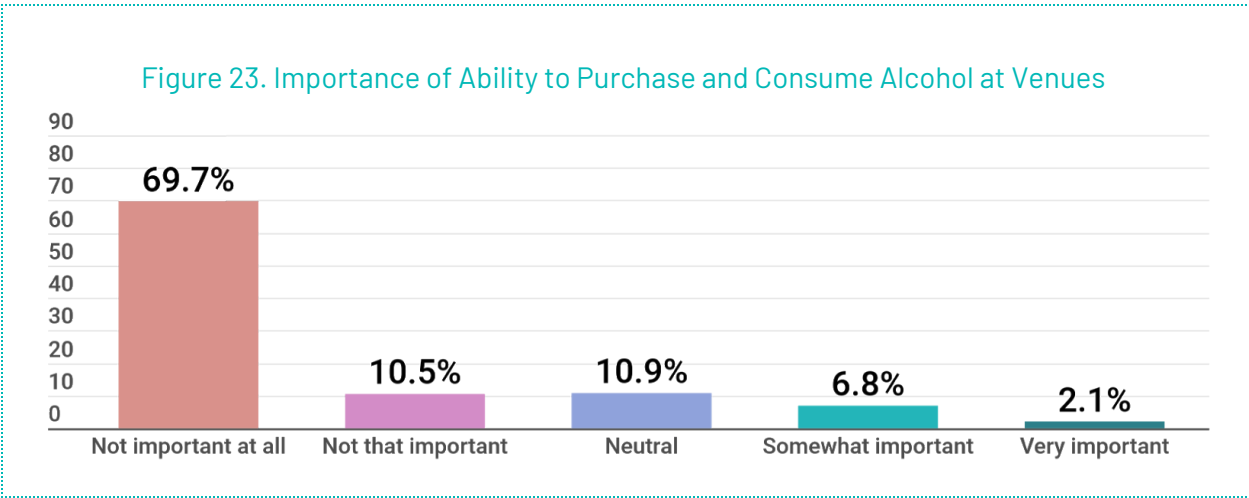
Venue Characteristics



Venue size matters (Figure 21). More than half of visitors stated that medium sized venues with a capacity to seat 350 - 999 people were their preferred type of venue to see live music shows (54.2%). Smaller, more intimate venues with a capacity of up to 350 were their second favorite (29.8%). Only one in ten chose large music venues with a 1,000-2,000 capacity (10%). Finally, very large venues with a 2,000+ capacity (1.6%) or bars/nightclubs (1%) were cited as their least favorite.



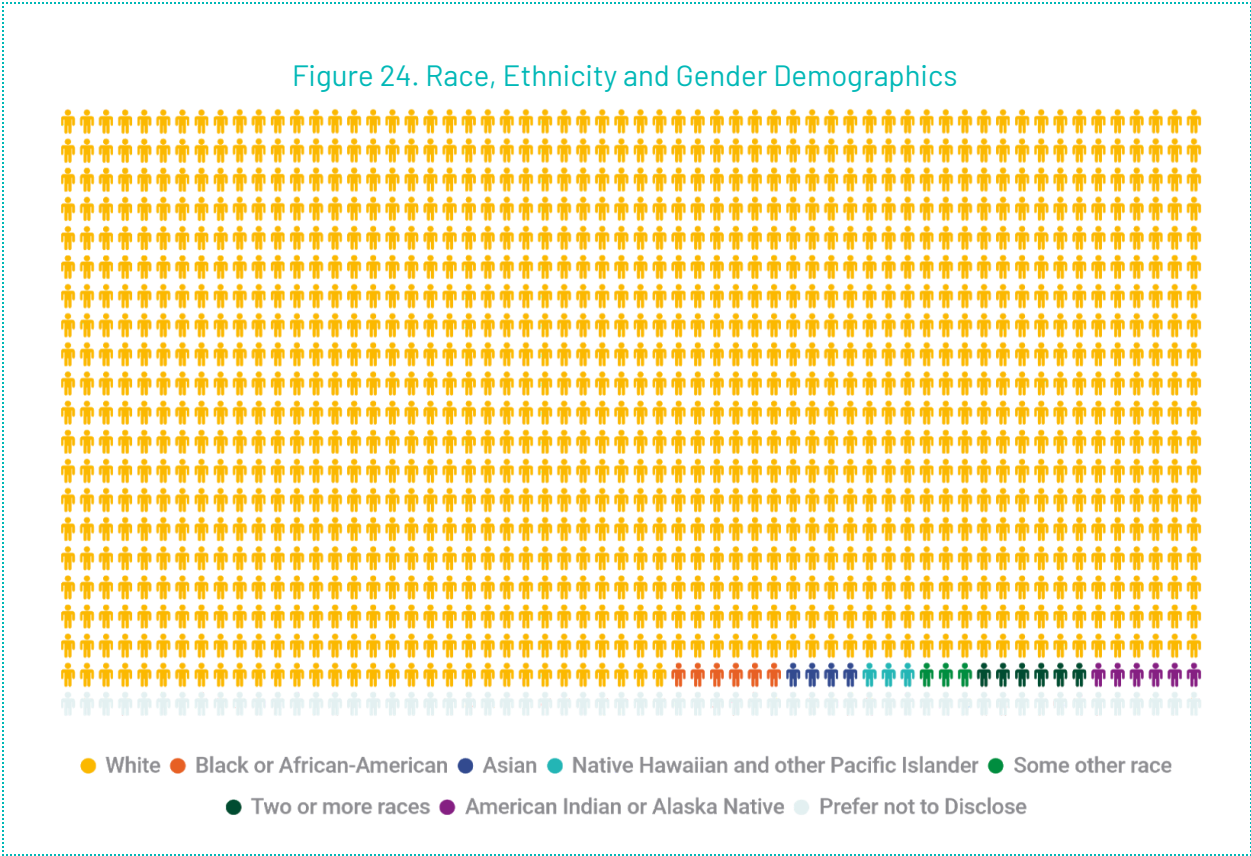
Seat comfort is also important (Figure 22). Almost all Branson visitors (90.1%) said that seat comfort is somewhat to very important to them when seeing a live music show.

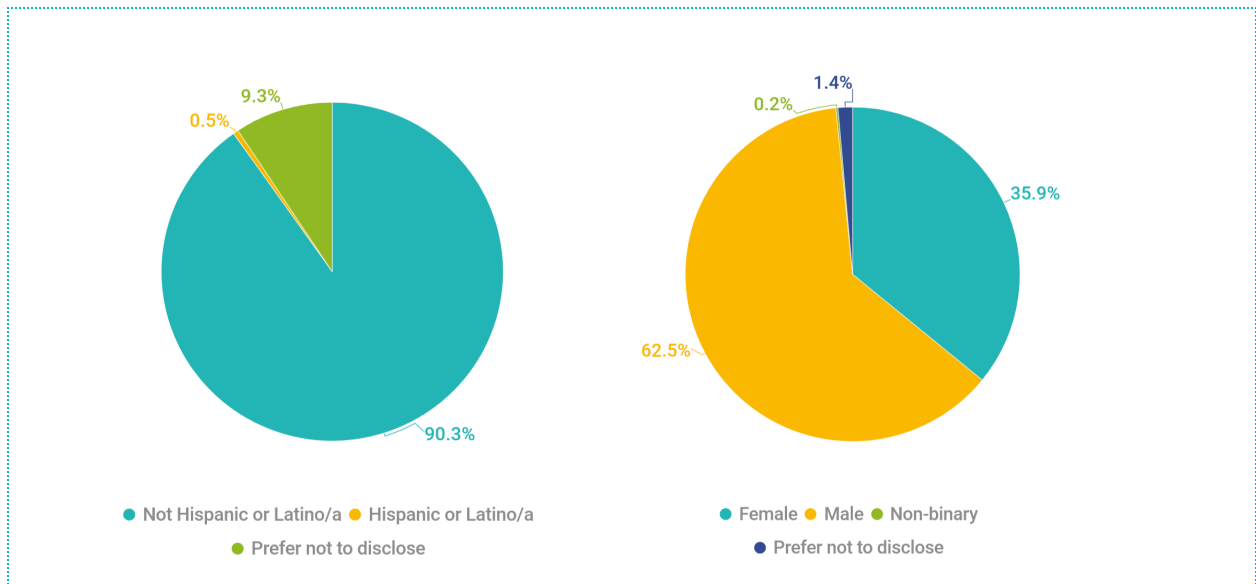


On the other hand, being able to purchase and consume alcohol at venues is not as important to Branson visitors (69.7% not at all important) (Figure 23). Currently, only about one in ten say that it is (8.9% somewhat - very important). The above also holds true for all generations and regardless of reason to visit.

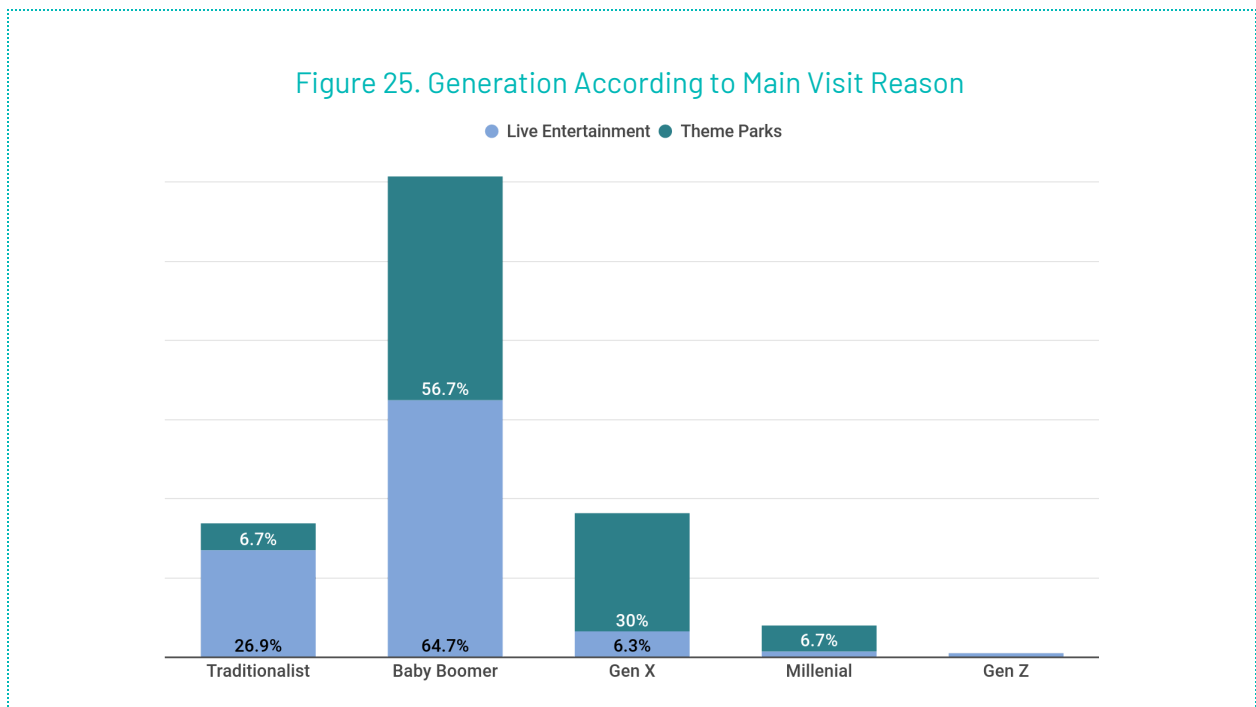
Demographics

Survey respondents were primarily white (93.1%), non-hispanic (90.3%), male (62.5%) baby boomers (61.4%), followed by 20.8% traditionalists (Figure 24). Based on H2R Market Research information, this is in line with the general Branson visitor profile and representative of Branson’s visitor database.





Visitors who came to Branson primarily for its theme parks and attractions skewed a little bit younger, with hardly any traditionalists, but 56.7% baby boomers, followed by 30% Gen-Xers and 6.7% millennials (Figure 25).



Next Steps

In addition to this Visitor Survey, Sound Diplomacy collected feedback from community stakeholders and visitors through two additional surveys: One addressed specifically to theater owners/operators and show owners/operators, and another one addressed to all citizens (directly related to the live theater industry and audiences). 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.