



SOUND
DIPLOMACY

BRANSON THEATRE

HEALTH & NEEDS ANALYSIS

STRATEGIC ACTION PLAN

Client: Branson/Lakes Area
Chamber of Commerce & CVB

Executive Summary
September 2020

FOREWORD

Dear Branson,

First, we want to thank you for the opportunity to let us work with you on this Theatre Health and Needs Analysis. We knew that Branson had a reputation of being the “live music show capital of the world” when we began the work, and the breadth and depth of talent, inventiveness and creativity we encountered was incredible.

We saw it when we came to visit, conducted interviews and roundtables and attended 11 amazing shows. After nearly a year of analysis, we hope that these recommendations – even in uncertain times – provide a roadmap for how to leverage what you have built and continue to develop it into the future.

We believe these recommendations reflect Branson's uniqueness and will elevate your strengths. But it will take the community – in the widest sense of the word – to come together to implement them. Doing so will create a more equitable ecosystem for performers, owners, visitors and show workers. It will prioritize creativity and innovation through the development of a new framework to beta-test and incubate new ideas. And it is meant to ensure money is thoughtfully invested, so Branson can continue to develop world-class shows and talent in the city and region.

Throughout the process, we spoke to more than 60 stakeholders. An additional 461 community members and 647 visitors filled out the surveys. And with the support of the Branson/Lakes Area Chamber of Commerce and CVB and the Branson Show Task Force, we were able to dive into the economics of the sector and propose this action plan to grow it. This study is yours. We look forward to being a part of implementing it in the future and watching Branson's music and theatre sector thrive for many years to come.

**Best,
Shain Shapiro, PhD
Founder & Group CEO
of Sound Diplomacy**

1.1 ABOUT THE PROJECT

Sound Diplomacy was hired by the Branson/Lakes Area Chamber of Commerce and CVB to conduct a Theatre Health and Needs Analysis. The objective was to identify opportunities to help overcome existing challenges.

Live music, mainly in the form of theatre shows, has been central to Branson's heritage since the 1960s and the city has attracted millions of visitors each year with more than 100 regularly occurring live music shows among other local attractions, recreational activities and its natural beauty. To date, live theatres are still cited as Branson's number one attraction and tourism driver by its visitors.

Branson's theatre industry has been affected by changing consumer and market trends, new visitor travel patterns, a lack of best practice guidelines, and loose regulations around licensing for theatres, shows and ticket sellers. This strategic action plan encourages best practice measures rooted in research and advocates for smart economic development and collaboration between the private and public sectors so that musicians, industry professionals and organizations are actively working together, advocating for change. Only then will Branson ensure that the theatre industry remains a driver of visitation in the future.

A NOTE ABOUT THE IMPACT OF COVID-19

It should be noted that the current COVID-19 crisis is adversely affecting the music and entertainment sector. At the time of writing, millions have been lost in salaries and cancelled gigs, with little-to-no paid work for the sector going forward. This live music theatre strategy acknowledges these challenges, but it is not intended to be a short-term fix or to act as an emergency pathway. Instead, it aims to create a long-lasting foundation for Branson's theatre industry and music ecosystem post-Covid so that it is stronger and smarter. The recommendations we propose are flexible and implementation should be adapted and reassessed, at least annually, according to the priorities and achievements from the previous implementation phase.



1.2 METHODOLOGY

The Branson Theatre Health and Needs Analysis was completed through the following process:

THE BRANSON MARKET AND NATIONAL TRENDS ANALYSIS

Desk research, including an extensive literature review of the Branson market and its resources, as well as any relevant national trends, such as audience trends, live theatre trends, pricing trends, and marketing trends.

SURVEYS

Three online surveys, conducted over six weeks, to gather information from local theatre and show owners and operators, theatre industry professionals, musicians and Branson-based theatre fans (who engage in theatre activities in Branson), as well as from visitors.

ACTION PLAN AND RECOMMENDATIONS

The strategy has been separated into four priority actions with a total of 13 recommendations, complete with case studies and best practices. Additionally, there is a section that outlines a Roadmap for Branson's Theatre industry success.

MAPPING

96 music and theatre-related assets and businesses across Branson.

SWOT/GAP ANALYSIS

Based on the findings of the above outlined research.

MUSIC ECOSYSTEM ECONOMIC IMPACT ASSESSMENT

Economic Impact Analysis of the theatre sector and microeconomic analysis.

ROUNDTABLES AND INTERVIEWS

In-person visit to Branson, engaging more than 60 people in roundtable discussions and interviews; attendance of 11 different theatre shows, hand-picked by the Branson/Lakes Area Chamber of Commerce and CVB and the Branson Show Task Force.



ECONOMIC IMPACT

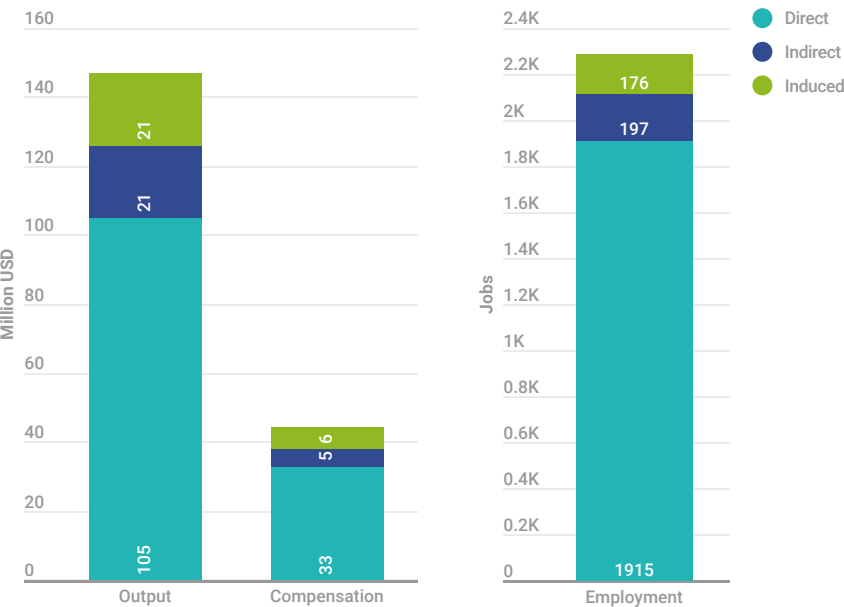


2. ECONOMIC IMPACT

Branson’s live theatre and music ecosystem created a direct economic impact of 1,915 jobs, \$33 million in earnings and \$105 million in economic output. When including the indirect and induced economic effects, Branson’s live theatre and music ecosystem generated a total output of \$147 million and a Value Added (GVA) of \$118 million to the local economy in 2016.¹

The total number of jobs² generated and supported by the music sector in the area was 2,288, which accounted for 8.96% of employment in Taney County. The total earnings generated within the Branson Performing Arts and Music Ecosystem totaled \$44 million (Figure 1).

FIGURE 1: BRANSON LIVE THEATRE AND MUSIC ECOSYSTEM ECONOMIC IMPACT

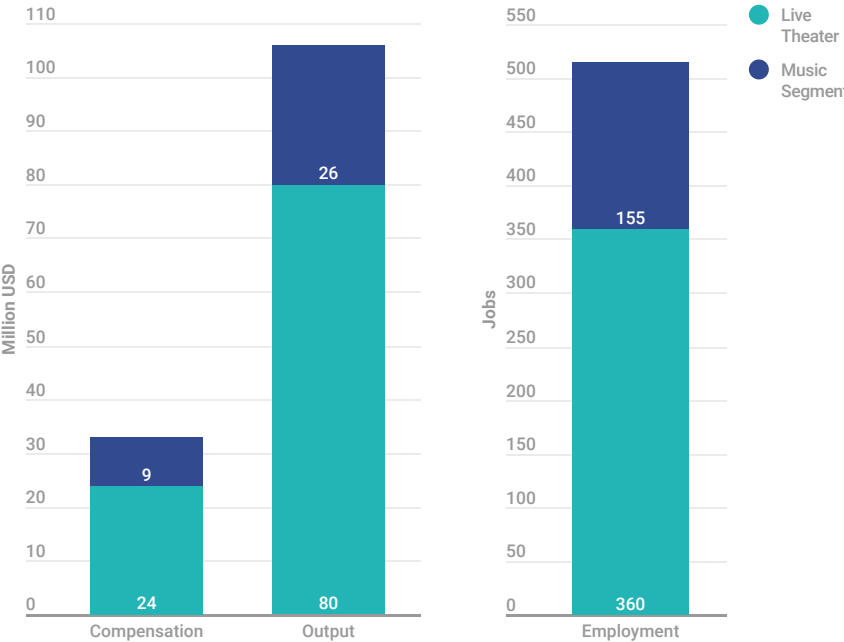


Source: Business Patterns (2016), RIMS II, Sound Diplomacy Research

DIRECT IMPACT

Looking at the two individual segments (live theatre segment vs. music segment), the live theatre segment supported 81% of the direct employment, 75% of the direct output and 73% of the direct compensation generated by Branson’s live theatre and music ecosystem (Figure 2).

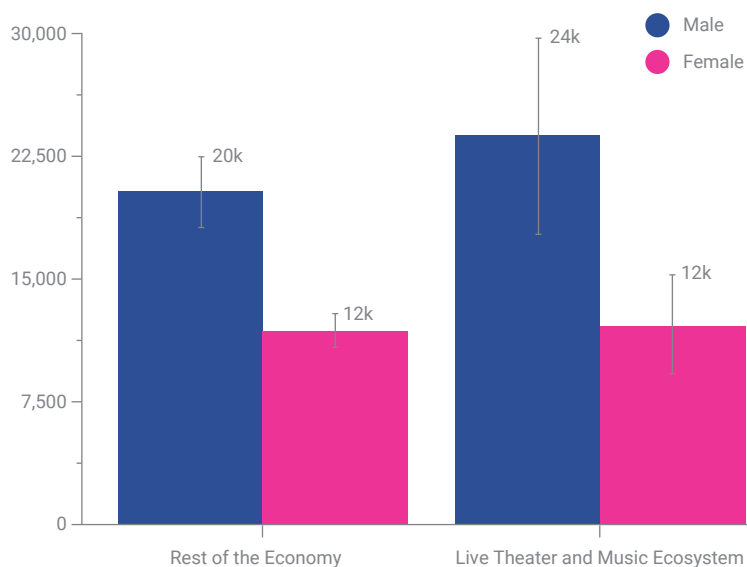
FIGURE 2: DIRECT IMPACT BY SEGMENT, 2016



Source: Business Patterns (2016), RIMS II, Sound Diplomacy Research

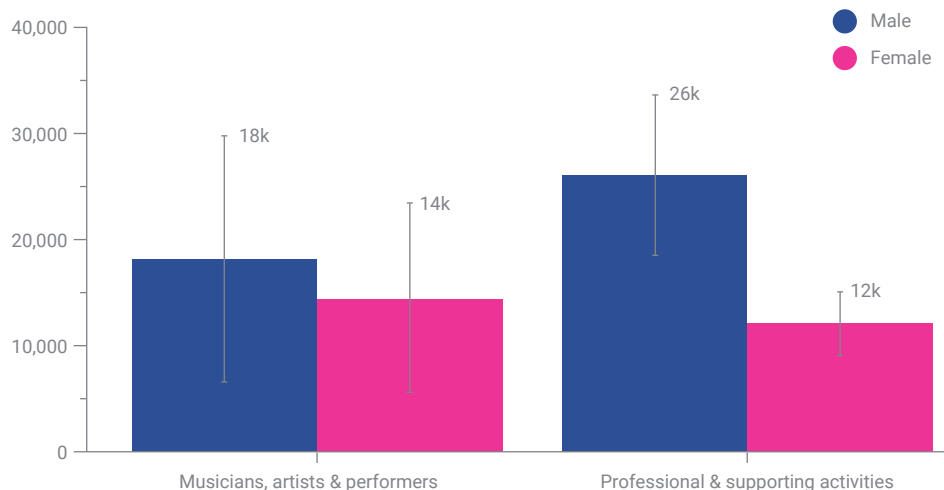
Figure 3 compares the average wages of men and women comparing the live theatre and music ecosystem to the rest of the local economy. It illustrates the gender wage gap in the local economy, as men earn on average more than women in both subdivisions (\$20k-\$24k vs. \$12k, respectively). Since the vertical lines do not overlap, the difference in wages is also statistically significant. While the data does not reveal the reason for this income gap, its significance warrants further investigation.

FIGURE 3: LIVE THEATRE AND MUSIC ECOSYSTEM AVERAGE WAGES BY ECONOMY, 2016



Source: American Community Survey 2013-2017, Sound Diplomacy Research

FIGURE 4. LIVE THEATRE AND MUSIC ECOSYSTEM AVERAGE ANNUAL WAGES BY SEGMENT, 2016



Source: American Community Survey 2013-2017, Sound Diplomacy Research

Figure 4 shows that men earn considerably more than women in the professional segment (\$26k vs. \$12k, respectively). This difference is statistically significant.

On the other hand, the difference in income between genders in the artistic segment is not statistically significant. While the data does not reveal the reason for this income gap, its significance warrants further investigation so that it can be addressed to ensure equal pay in Branson's theatre industry.

1 The calculations are made for 2016 as that is the most updated version of the County Business Patterns database. This data source provides relevant information to estimate the number of employees at the local level.

2 Total number of jobs = direct jobs + indirect jobs + induced jobs.

INDIRECT IMPACT

In 2016, the indirect economic impact of the live theatre and music ecosystem in Branson reached an output of \$21 million, while the sum of the indirect earnings (compensation) reached \$5 million. At the same time, it is estimated that 197 jobs were indirectly supported by the live theatre and music ecosystem in 2016.

Keeping consistent with the distribution of the impact among the segments, it was estimated that 85% of the indirect employment and 83% of the indirect output of Branson's live theatre and music ecosystem was supported by the theatre segment in 2016.

INDUCED IMPACT

The induced output of the live theatre and music ecosystem in Branson reached \$21 million in 2016 and supported 176 jobs, with an induced compensation of \$6 million. 72% of the induced output, 72% of the jobs supported and 74% of the induced compensation of Branson's live theatre and music ecosystem come from the theatre segment.

BRANSON IN COMPARISON

For Branson, the theatre and music sectors directly and indirectly support 8.96% of Taney County employment. This figure exceeds the contribution made by the music sector in the other cities and places that have similar reports, such as New Orleans or Austin, where the music ecosystem contribution reached 5.37% and 2.55%, respectively (Figure 5).

3 Branson figure includes live theatre employees in addition to music ecosystem employees.

4 The output per capita of the other cities and regions only takes into account the music ecosystem, while Taney County's analysis also includes the theatre sector.

FIGURE 5. MUSIC ECOSYSTEM EMPLOYMENT, US CITIES AND AREAS³

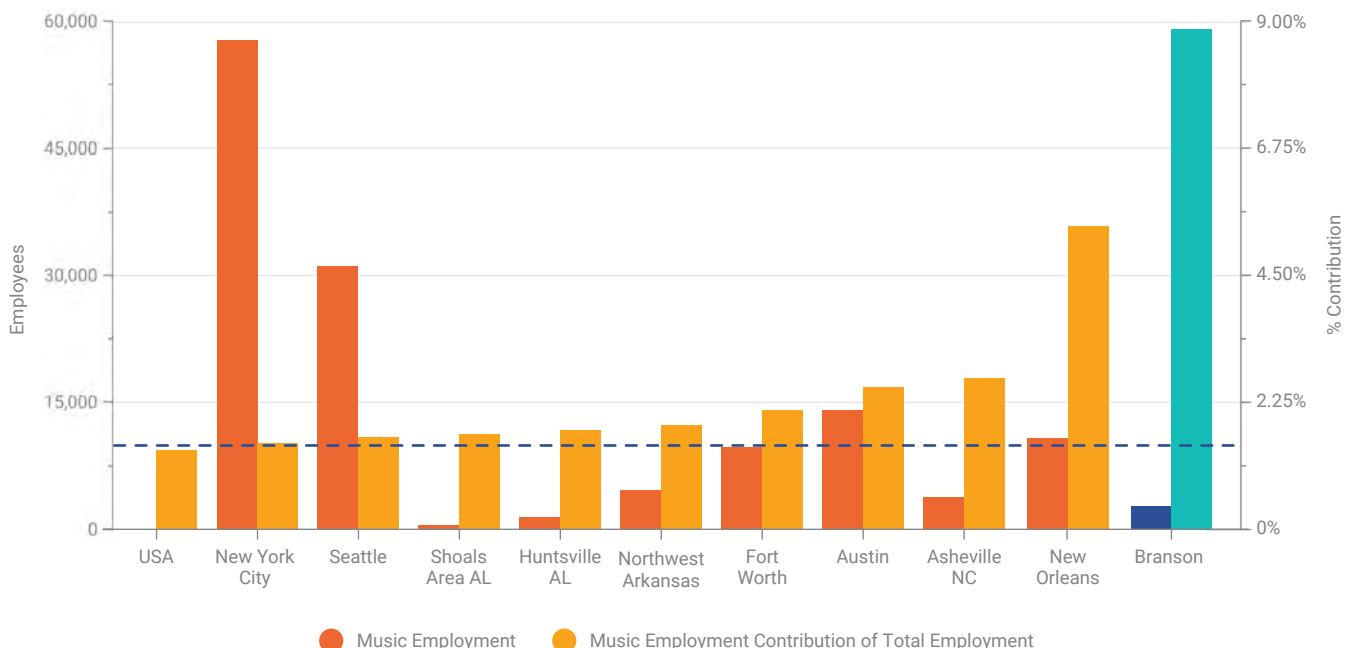
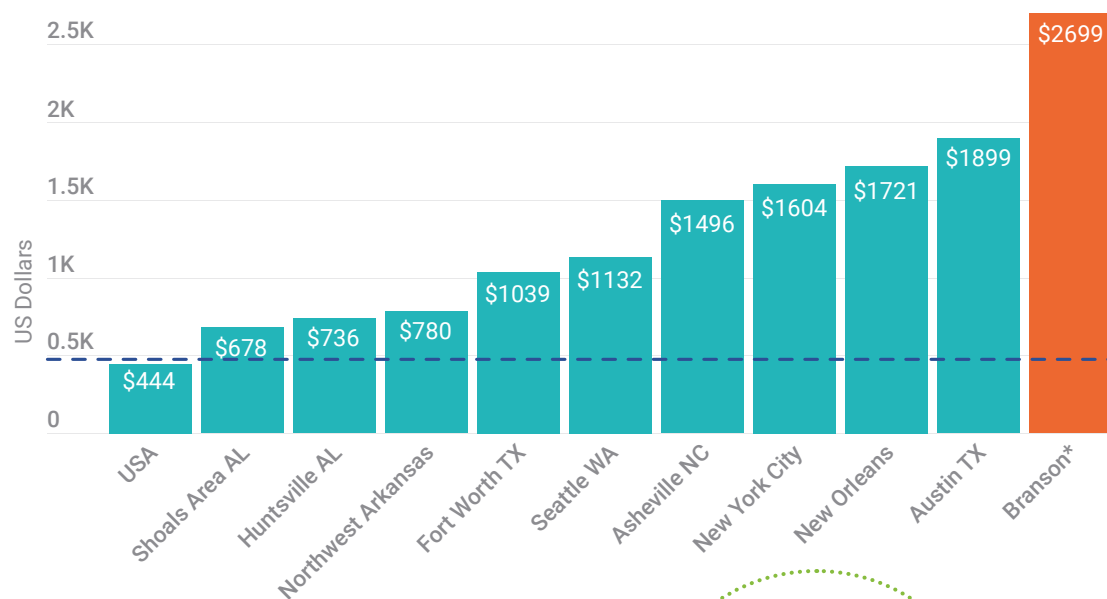


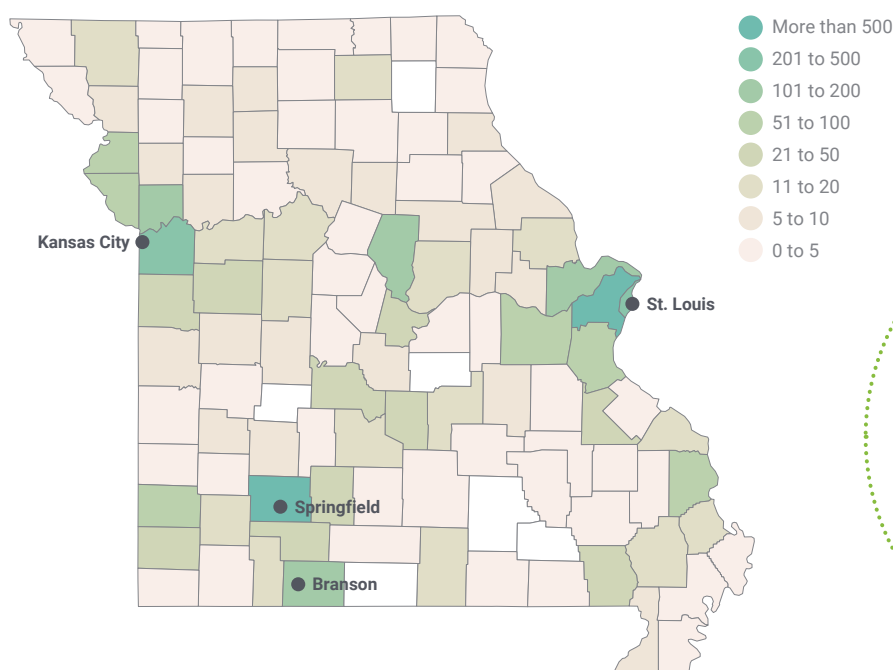
FIGURE 6. MUSIC ECOSYSTEM OUTPUT PER CAPITA IN USD, US CITIES AND AREAS AND LIVE THEATRE AND MUSIC ECOSYSTEM PER CAPITA IN BRANSON



The music output per capita in the United States is \$444. In Branson/Taney County this figure reached \$2,699 in 2016.⁴

In the case of cities such as Austin and New York, which have high flows of music tourism and strongly consolidated industries, this figure is \$1,899 and \$1,604, respectively (Figure 6).

FIGURE 7. NUMBER OF MISSOURI'S LIVE THEATRE AND MUSIC ECOSYSTEM ESTABLISHMENTS BY COUNTY, 2016



With 126 establishments, Taney County ranks in the top 5% of counties in Missouri. The county with the highest number of live theatre and music establishments is St. Louis County (709) followed by Jackson County (474), St. Louis city (277) and Greene County (214) (Figure 7).

TICKET SELLERS

Ticket sellers supported 202 direct employees, and generated a direct output of \$31.4 million, a direct compensation of \$8.6 million and a GVA of \$20 million in 2016. This means that ticket sellers, as agents involved in sectors such as tourism, amusements, theatre, etc., support approximately 0.8% of employment in the county.

However, there is also a negative economic impact associated with third party ticket sellers. The Theatre and Show Owner/Operator Survey, which was conducted by Sound Diplomacy as part of the Theatre Health and Needs Analysis, revealed that third party ticket sellers tend to buy tickets at an average 22% discount from theatres.



This is potentially lost revenue for the theatres/shows, which therefore cannot be reinvested in theatre staff, products or marketing. Additionally, third party ticket sellers are only required to pay taxes on the ticket price they pay theatres upon the initial purchase of those tickets. They do not pay taxes on the full amount of the ticket cost, which they then pass on to the customer. Taking the earlier mentioned 22% discount into account, this implies a 22% tax revenue loss on tickets which are sold via third party sellers.



MAPPING



3. OVERVIEW OF ASSETS IN BRANSON

Disclaimer: This research was last amended on March 18, 2020, before the Covid-19 pandemic fully unfolded. Some places may no longer be in operation.

Sound Diplomacy identified theatre and live music related uses in Branson. This mapping was produced with our proprietary mapping tool and cross-referenced manually, with input from the Branson/Lakes Area Chamber of Commerce and CVB and the local community.

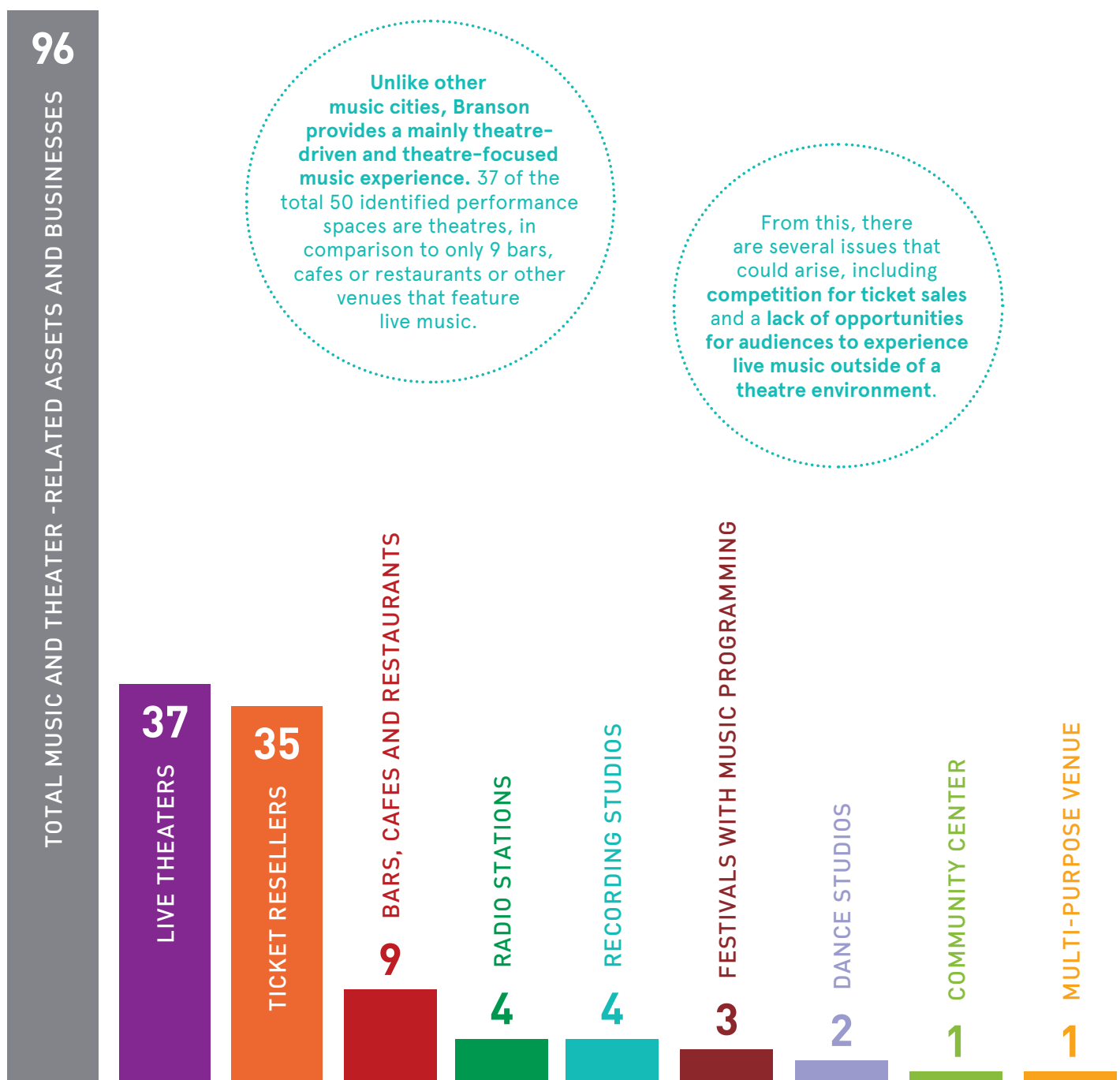


FIGURE 8. MAP OF BRANSON'S LIVE THEATRE AND MUSIC ECOSYSTEM ASSETS (ALL)

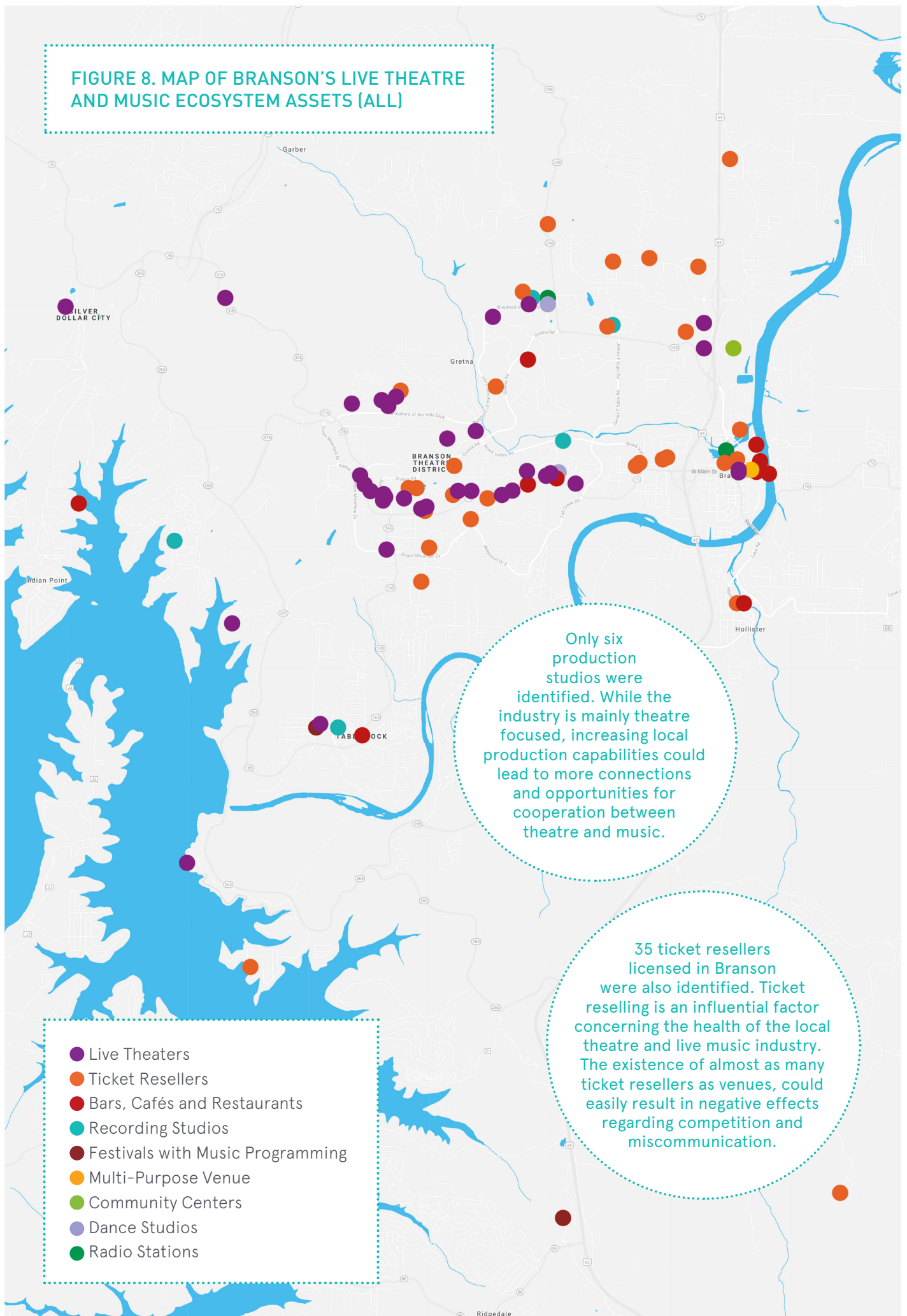


FIGURE 9. THIRD PARTY TICKET SELLERS MAPPED IN BRANSON

The mapping revealed a number of missing assets, including music related businesses and theatre or music education programs.

The mapping also revealed a lack of networks related to supporting the industry, especially through education. Most healthy industries have a variety of supportive business or educational programs that strengthen the skills of and opportunities for stakeholders in the network.

Music-related festivals were also lacking, with only 3 identified. Expansion of existing or creation of new music – and even theatre-related – festivals could increase the local and tourism-related activity in the area.

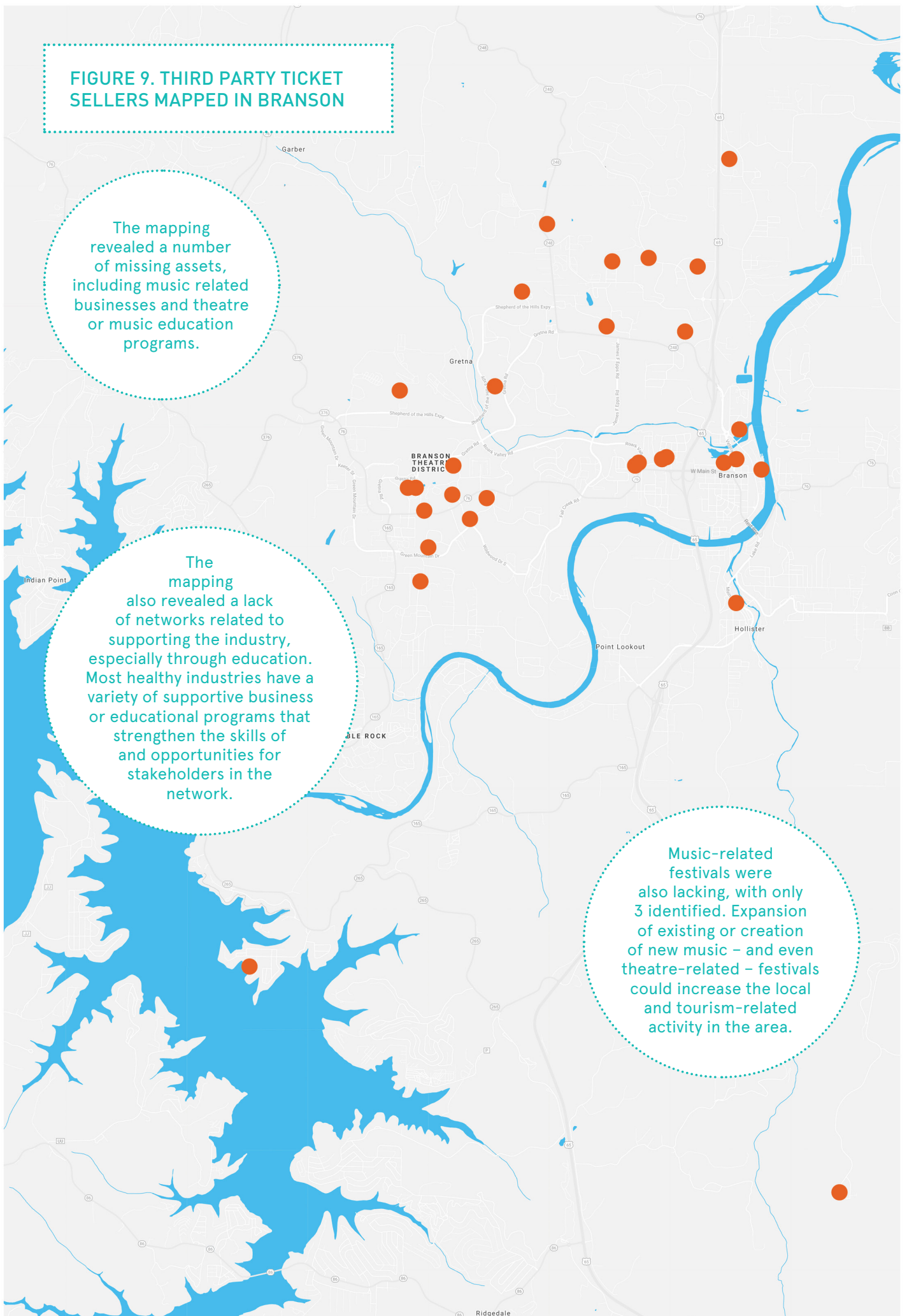
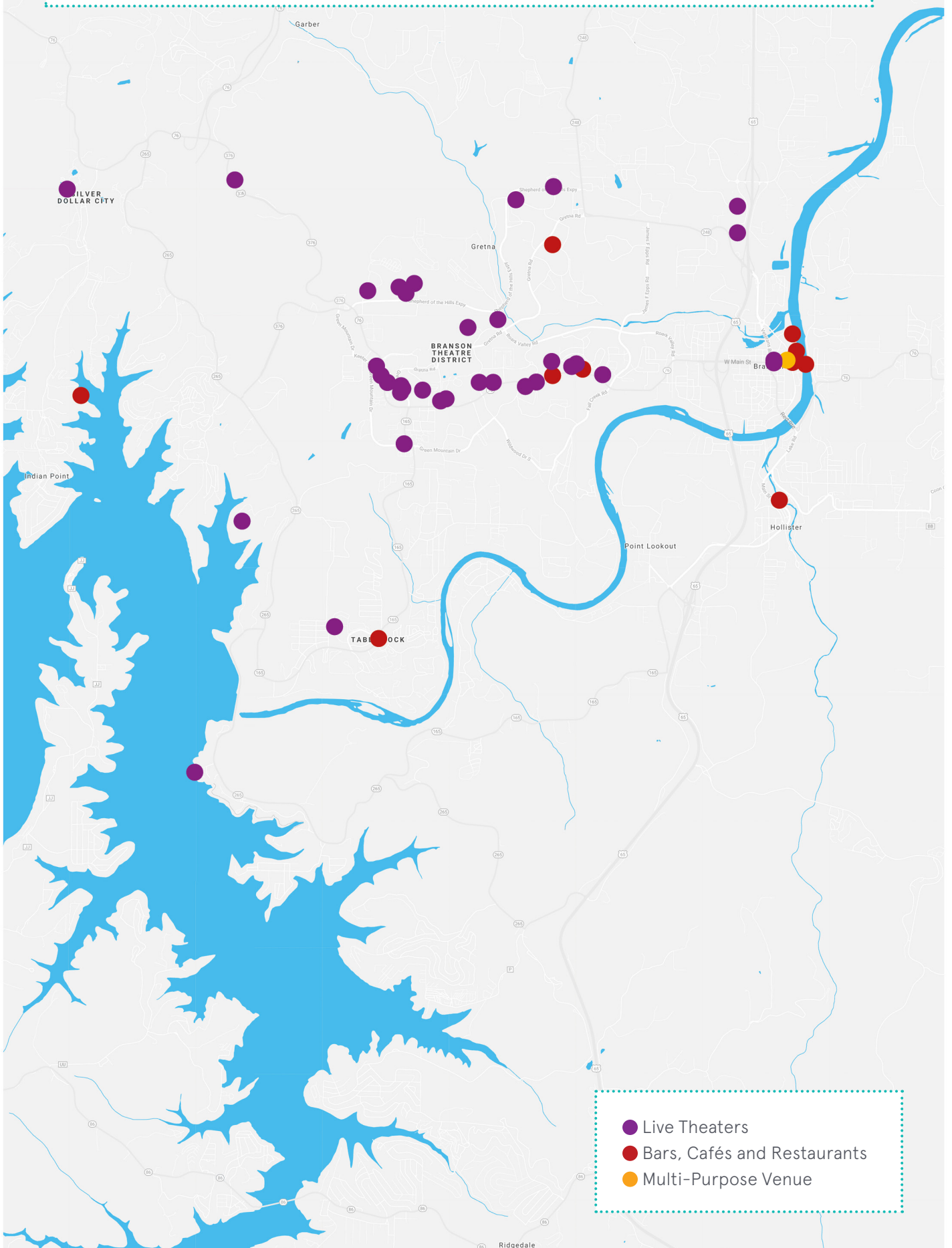


FIGURE 10. LIVE MUSIC VENUES MAPPED IN BRANSON, INCLUDING LIVE THEATRES, MULTI-PURPOSE VENUES AND BARS, CAFES AND RESTAURANTS WITH LIVE MUSIC



4. RESEARCH AND ENGAGEMENT

SWOT ANALYSIS

STRENGTHS

- **Big economic impact:** Branson's live theatre and music ecosystem created an economic impact of **2,288 jobs, \$44 million in earnings and \$147 million in economic output.**
- **Live theatres support 81%** of the direct employment, **75%** of the direct output and **73%** of the direct compensation generated by Branson's music ecosystem.
- Live theatre entertainment **drives visitation** in Branson.
- High number of Branson live theatres and shows result in **lots of choices.**
- **Visitors highly rate** Branson's live theatre industry and **interest in live shows remains high.**
- The average Branson visitor attends **two to three shows** during their Branson visit.
- **Baby boomers are Branson's core theatre audience** attending more shows than their younger counterparts or those who visit for other attractions; boomers can travel year-round due to limited commitments to jobs or kids.
- **Visitors prefer variety shows and dinner shows,** which are prominent theatre formats in Branson.
- Most theatres/shows report making **marketing investments their top priority** for the next three years, followed by changes to their marketing strategy.
- The better performing theatres/shows report that **investments in new theatre productions** (costumes, staff, choreographers), changing their **ticket selling strategy**, investing in **marketing** and changing their marketing strategy had the **highest impact on their financial success** in the past five years.

WEAKNESSES

- The **local live theatre audience** only attend shows **once per year.**
- **Branson visitors prefer medium sized and small venues,** yet most existing theatres are larger in size, often resulting in **half-empty shows,** which may give an appearance of an unpopular or unsuccessful show.
- **Lack of small, non-theatre style venues** which could host Branson's low-production-value shows.
- Some **dated theatre venues.**
- For the younger (non baby boomer) Branson visitor, **show content can feel dated and lack appeal.**
- Nearly half of show operators who rent a venue **do not collect their own customer data,** limiting their customer marketing abilities.
- **Low engagement of the theatre industry with its related advisory boards,** such as the Show Task Force or the Theatre League; hence **limited unity** around common goals and needs.
- Show/Theatre license requirements do not take **financial stability or quality standards** into consideration.
- Some theatres/shows **lack marketing budgets** and desire better marketing know-how.
- **Limited opportunities to experience live music** in Branson **outside of the theatre show industry.**
- **Gender wage gap:** on average, **men earn double what women earn** in Branson's live theatre and music ecosystem, particularly in professional and supporting activities.
- **Lacking local music and theatre industry support networks,** such as music related businesses and theatre or music education programs.

THREATS

- **Younger visitors** – Gen X and millennials – **favor alternative rock, hard rock, and pop**, which is not as prominent in Branson as Country and Christian/Gospel music.
- **Visitors have expressed a higher interest in original music**, yet many theatres primarily feature music in the form of cover songs.
- As **consumers are moving more and more into the digital space**, relying more heavily on **online media like search and social media** for their show information, marketing strategies should adapt accordingly.
- **Emerging trend**: productions that explore the **intersection of arts, technology and engineering** – in particular, finding new ways to create magical events on stage through robotics and projection.

OPPORTUNITIES

- Branson's **current theatre audience is aging** and younger generations choose other entertainment over theatre shows.
- **Lack of time**: visitors take shorter vacations now than during Branson's boom, limiting their show consumption.
- **Increased competition** from other attractions result in skipping shows.
- Changing content consumption habits result in **higher expectations** of live shows and **perceived value**.
- **Partnerships with third party ticket sellers aren't always mutually beneficial**, yet remain the main avenue for ticket sales.
- **Prohibitive laws and regulations** around ticket distribution/third party ticket sellers
- **Poor walkability** of the entertainment corridor or "strip," limiting its appeal to move around and explore.
- **Lacking public transportation** to theatres within Branson.





STRATEGIC PLAN



5.1 IMPLEMENTATION TIMELINE

The following recommendations are based on the collective research that Sound Diplomacy completed. They are critical in moving Branson's theatre industry forward with an approach, attitude and a set of initiatives that establish a thriving and supported live theatre and music ecosystem that stimulates economic growth and drives tourism.

The following recommendations are categorised by:

1. INFRASTRUCTURE
2. INNOVATION
3. EDUCATION
4. MARKETING



PHASE 1 (0-12 MONTHS)	PHASE 2 (12-24 MONTHS)	PHASE 3 (24-48 MONTHS)
	RECOMMENDATION #1 Develop the Branson Performing Arts Row – Attract, Grow and Retain Music Industry Companies	
RECOMMENDATION #2 Performing Arts Incubator/Center		
		RECOMMENDATION #3 Feasibility Study for an Arena
	RECOMMENDATION #4 Small Business Loans for Theatre Updates	
	RECOMMENDATION #5 Improved Public Transportation for a More Pedestrian-Friendly Entertainment Corridor	
RECOMMENDATION #6 Issue Official Branson Show Certificates		
RECOMMENDATION #7 Restricting Third-Party Ticket Sellers from the Use of the Label ‘Welcome Center’ or ‘Visitor Center’		
	RECOMMENDATION #8 Development of a Disaster Readiness Plan	
RECOMMENDATION #9 Create the Office of Theatre Innovation		
RECOMMENDATION #10 Offer Theatre Business Workshops		
		RECOMMENDATION #11 Develop a Music Liaison Service to Identify and Promote Fulton County Artists
		RECOMMENDATION #12 Create a Theatre Matching Fund Program
RECOMMENDATION #13 Create a Branson Theatre Passport		

5.2 INFRASTRUCTURE

RECOMMENDATION #1

**Branson Performing Arts Row
with a Focus on Business
Development – Attract,
Grow and Retain Music
Industry Companies**

Timeline: Phase 2 (12–24 months)

Implementation Considerations:

- Work with potential developers to create a private/public partnership to fund the Branson Performing Arts Row.
- Create an overarching marketing and PR campaign emphasizing Branson's music and theatre industry as being ripe for further development by focusing on existing music business activities as well as future opportunities.
- Organize a CEO or Executive Summit to Branson for representatives from top music companies; Potentially host at the same time as the songwriters festival (see Recommendation #11); Coordinate a tour of the city and existing music and theatre assets, demonstrating its attractiveness for such companies.
- Connect the Branson Performing Arts Row to the new Performing Arts Incubator (see Recommendation #2) for increased value and appeal.
- Liaise with local colleges to connect the future workforce and future talent with local music businesses; provide internship and master class opportunities and inject new ideas into the Branson music and theatre scene.



RECOMMENDATION #2

Performing Arts Incubator/Center

Timeline: Phase 1 (1-12 months)

Implementation Considerations:

- The Branson Lakes Area Chamber of Commerce and CVB should lead this effort.
 - Identify an existing structure which could be re-purposed or a vacant plot of land which could be developed.
 - Although not absolutely necessary, consider the proximity and location of the new Branson Performing Arts Row. Closer proximity may encourage better collaboration.
- Work with a developer to create a private/public partnership to fund the Performing Arts Incubator:
 - As an incentive, create a developer agreement tied to a physical location that dedicates ½ cent back to their project over a 5-10 year period, if the Incubator proves to be successful. It demonstrates that the city is willing to share in the success of an asset that drives new revenue to the local performing arts (theatre) segment.
 - Have the Performing Arts Incubator collect a 1% fee of the total profits of those businesses/ideas/productions, etc. that are successful to create a profit model.
 - Partner with the Office of Theatre Innovation, local colleges and the Community Arts Center, allowing them to offer innovative workshops/networking opportunities and to bring in guest speakers.
 - Create a marketing strategy highlighting the Performing Arts Incubator and its innovative ideas and developments to promote Branson as the industry's Global RND City for live theatre entertainment.

RECOMMENDATION #3

Feasibility Study for an Arena

Timeline: Phase 3
(24-48 months)

Implementation Considerations:

- A community stakeholder group, the Tourism Community Enhancement District (TCED), or City of Branson should commission a feasibility study to determine the need, benefits and profitability of a large arena in Branson. This effort can be led by the Branson/Lakes Area Chamber of Commerce and CVB.



RECOMMENDATION #4

Small Business Loans for Theatre Updates

Timeline: Phase 2 (12-24 months)

Implementation Considerations:

- Tap into existing microloan programs for curb improvement, where applicable.
- Create a revolving loan fund at favorable terms for theatres and show operators to enhance or reinvest in their theatres.
- Set specific rules for completion timelines in order to qualify.
- Create an outreach campaign promoting this program to the local theatre community.



RECOMMENDATION #5

**Improved Public Transportation
for a More Pedestrian Friendly
Entertainment Corridor**

Timeline: Phase 2 (12-24 months)

Implementation Considerations:

- Amend the 76 Complete Streets Plan to fund the expansion of the trolley service to connect downtown Branson with the Entertainment Corridor and alleviate some of the traffic congestion on Hwy 76.
- Improve the walkability of the Entertainment Corridor to encourage more pedestrian traffic: wider sidewalks and more crosswalks with stop lights.
- The Branson/Lakes Area Chamber of Commerce and CVB should collaborate with the 76 Entertainment CID board to amend and implement the 76 Complete Streets Plan.

RECOMMENDATION #6

**Issue Official Branson
Show Certificates**

Timeline: Phase 1 (0-12 months)

Implementation Considerations:

- The City of Branson, through its “Open for Business” program, and the Show Task Force should create a peer review process with agreed-upon standards, in line with the Roadmap for Branson’s Theatre Industry Success.
- Require a business plan, marketing strategy and proof of financial resources and a secured adequate marketing budget for the certification.
- Promote this service through the Branson/Lakes Area Chamber of Commerce and CVB.

RECOMMENDATION #7

Restricting Third Party Ticket Sellers from the Use of the Label 'Welcome Center' or 'Visitor Center'

Timeline: Phase 1 (0-12 months)

Implementation Considerations:

- Include a regulation in third party ticket seller licenses that restricts the use of the label welcome center or visitor center.
- Require third party ticket sellers to display their license that identifies them as a third party ticket outlet and clearly informs the consumer that they are not at an official box office.
- Require a licensed reseller conducting business through the internet or any retail ticket purchasing website, application, phone system or other technology used to sell tickets, to conspicuously display a hyperlink to a copy of the license on their site or system and to post a clear and conspicuous notice on the website that the site is for the secondary sale of a ticket.
- Issue a "cease and desist" letter from the Branson/Lakes Area Chamber of Commerce and CVB and/or the City of Branson to any non-complying third party ticket seller.
- Create a label for the theatres' official box offices that helps clearly identify them as such.



RECOMMENDATION #8

Development of a Disaster Readiness Plan

Timeline: Phase 1 (12-24 months)

Implementation Considerations:

- The recently created COVID-19 Recovery Task Force should lead this effort with the help of local emergency services personnel, the Taney County Health Department, and the Southwest Missouri Council of Governments (SMCOG), among others.
- Assign a dedicated person or hire a consultancy to collect case studies of successful recovery plans that could be applied to Branson and have them develop a future Disaster Readiness Plan for Branson.
- Collaborate with the Branson Show Task Force to establish the Theatre Emergency Fund and create buy-in from the local theatre and show community.

5.3

INNOVATION

RECOMMENDATION #9

Create the Office of Theatre Innovation

Timeline: Phase 1 (0-12 months)

Implementation Considerations:

- Hire a full staff person to take on the responsibilities of this new office. This person should report to the Branson/Lakes Area Chamber of Commerce and CVB.
- The Office of Theatre Innovation would be member-funded and include membership groups such as students, full-time teachers and theatre/performing arts professionals, for example.
- Ideally, this office should be housed in the new Performing Arts Incubator, but until the Incubator is built, it can be based at the Chamber of Commerce.

5.4

EDUCATION

RECOMMENDATION #10

Offer Theatre Business Workshops

Timeline: Phase 1 (0-12 months)

Implementation Considerations:

- The Office of Theatre Innovation should plan and implement these workshops.
- Host the workshops at the new Performing Arts Incubator (see Recommendation #2).
- Set aside an annual budget for these workshops, potentially funded through sponsorships and/or Office of Theatre Innovation membership fees. Workshops should be affordable to attend.

- Hire local experts and/or create partnerships to bring experts to Branson to host workshops .
- Create a membership/class program to encourage buy-in and regular attendance (similar to enrolling in a college program). Make it an official, Branson-certified program that industry professionals graduate from at the end of each year as a way to incentivize enrollment & graduation.



RECOMMENDATION #11**Create a Songwriters Festival**

Timeline: Phase 3
(24-48 months)

Implementation Considerations:

- The Office of Theatre Innovation should be in charge of organizing this event – or of identifying a company that could organize it and provide all the necessary facilities.
- The Branson/Lakes Area of Commerce and CVB should apply for the Missouri Arts Council Grant to fund this event.
- Partner with local theatres to use their spaces.
- Reach out to cities like Nashville and Austin and their music businesses to invite music professionals and successful songwriters to host Songcamp workshops; another resource could be local colleges' music departments.
- Consider partnering with the NBC show Songland to send winners of the Branson Songwriter Award to compete in the show.

RECOMMENDATION #12**Create a Theatre Matching Fund Program**

Timeline: Phase 3
(24-48 months)

Implementation Considerations:

- The Branson/Lakes Area Chamber of Commerce and CVB should lead this effort.
- Offer grants that reimburse up to 75% of the total promotional (marketing) budget for the first year of a project, up to 50% for the second year of a project, and up to 25% for the third year of a project – yet do not exceed 50% of a project's total annual costs.
- The Branson/Lakes Area Chamber of Commerce and CVB should explore funding options and establish a maximum annual cap of the Theatre Matching Fund program.
- Funding mechanisms to be explored include state and federal programs, expanding the existing tourism taxing district, existing taxes, or new funding initiatives.

RECOMMENDATION #13**Create a Branson Theatre Passport**

Timeline: Phase 1 (0-12 months)

Implementation Considerations:

- The Branson/Lakes Area Chamber of Commerce and CVB should lead this effort and hire a company to develop the app.
- Create buy-in from the local theatre community and ask them to contribute prizes to participating Branson Theatre Passport holders. Make sure to include some compelling prizes in order to spike local interest and participation.
- Promote the app to Branson's front line personnel in local establishments, such as hotels, restaurants and third party ticket outlets.
- Regularly update the app to make sure all current shows are included.

6.1 ROADMAP FOR BRANSON'S THEATRE INDUSTRY SUCCESS

Sound Diplomacy surveyed Branson's current visitors and analyzed national theatre, audience and marketing trends to see how Branson's industry compares with local and national audience interests. The following recommendations are Best Practices for Branson's Theatre Industry, by identifying areas of improvement and necessary adjustments in order to remain competitive in the future.

TICKET PRICE INTEGRITY

Action Items:

- Reevaluate partnership agreements with third party ticket sellers and any existing discounting practices.
- Collaborate with city government to lobby against state-imposed ticket reseller protections, and push for price caps above purchase price.

DIVERSIFICATION OF THE SHOW PRODUCT – STAYING RELEVANT FOR A NEW GENERATION OF THEATRE GOERS

Action Items:

- Include show productions that appeal to Branson's younger family audience.
 - Consider shows with niche appeal which currently cannot be found in Branson, such as productions based on movies with animated source material.
- Include more modern rock and pop music to appeal to the younger generations.
- Include more original music in productions: Music shows in the form of original content were ranked in the top three categories for preferred show format by 42.1% of visitors
 - above music shows in the form of cover songs (34.4%).
- Produce marketing materials promoting these new productions to the younger target audience.

CONTINUOUS INVESTMENT FOR CONTINUOUS SUCCESS

Action Items:

- Frequently consult the Office of Theatre Innovation (see Recommendation #9) at the Performing Arts Incubator (see Recommendation #2) to stay on top of theatre industry, technology and audience trends.
- Invest in new technologies and/or theatre or production updates.
 - Closely watch emerging trends such as robotics and projections and find ways to implement them in productions.
- Apply for a small business loan/microloan with favorable terms for theatre updates (see Recommendation #4).
- Find ways to reimagine, resize and repurpose existing theatre space to create a more intimate experience for the customer.

ADAPTING FOR THE DIGITAL AGE: ONLINE TICKET SALES & MARKETING

Action Items:

- Set up an online ticket sale portal on the website to facilitate selling tickets directly to customers when they are planning their entertainment itinerary.
- Set up a customer database and collect customers' information; then engage them weekly through newsletters.
- Consider investing in strong customer relationship management software to help manage box office data and customer data; examples include Tessitura, Spektrix, Theatre Manager, Blackbaud and PatronBase.
- Invest in targeted digital marketing, such as social media, a website, and mobile intercept – it is often more affordable than traditional print advertising and can result in better ROI.
- Invest in SEO (Search Engine Optimization) to make sure the website ranks high in search results, directing visitors to the official box office.

CONTINUED EDUCATION WITH A FOCUS ON BUSINESS AND MARKETING

Action Items:

- Provide education resources to theatre employees and allow time off for training and advancing their business and marketing skills.
- Enroll in Branson's Theatre Business Workshops (see Recommendation #10) at the Performing Arts Incubator (see Recommendation #2).
- Consult local colleges and Branson's Community Arts Center for additional opportunities and resources.

WORK TOWARD EQUAL PAY

Action Items:

- Invest in employees and ensure they are happy with their current roles and compensation; this helps avoid turn-over.
- Conduct a payroll review to identify any striking gender wage differences and review the reasoning behind those gaps; then make the appropriate adjustments to ensure people get paid the same rate for the same type of work, work responsibility and work experience.



CONCLUSION

This report is the culmination of 12 months of research, stakeholder engagement and investigation. The four areas of priority and 13 recommendations are aimed at ensuring that Branson develops into a city with a world-class theatre industry. It demonstrates the significant value that the theatre industry has to Branson's economy, as a sector representing over 8% of the county's total workforce.

While there are a number of actions to take, the opportunity to boost the theatre industry and ensure that it remains a strong tourism driver for years to come is significant. The one thing that is difficult to manufacture – great music – happens every day in Branson. The rest is process and strategy, all of which can be delivered successfully through the actions and recommendations.

Sound Diplomacy's objective is that this report is seen as the beginning of a process, rather than a race. Considering the current COVID-19 pandemic, some of these recommendations will have to take the back-seat to more pressing issues at hand. However, these recommendations are intended to strengthen Branson's music and theatre ecosystem for a long time.



ABOUT SOUND DIPLOMACY



Sound Diplomacy is the leader of the global music cities movement. As strategists for cities, developers, large private sector organizations and governments, Sound Diplomacy provides cutting edge research and market expertise in placing music and night time economy strategies in city, urban and development plans. Sound Diplomacy works in over 20 countries and counts the Mayor of London, City of San Francisco, Lendlease, Walton Family Foundation and the City of Brisbane as clients. They also run the global leading series of conferences of music and public policy, called Music Cities Events.

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