In the fall of 2008, Theatre Development Fund commissioned the Infinia Group to do a study examining barriers to theatre participation among New Yorkers. TDF was interested in understanding the forces at work that were keeping New Yorkers from attending the theatre. We needed these insights to be able to create new programs which would be effective in building audiences. The study involved quantitative surveys and qualitative (focus groups, in home meetings) research as well as a culture scan. What follows is an extract from the findings.
EXPANDING TOMORROW’S AUDIENCE
UNDERSTANDING THEATRE’S AUDIENCE AND ITS PLACE IN CULTURE
**RECAP: UNDERSTANDING THEATRE’S CHALLENGES & OPPORTUNITIES**

<table>
<thead>
<tr>
<th>AUDIENCE INSIGHTS</th>
<th>CULTURAL TRENDS</th>
<th>ENTERTAINMENT SHIFTS</th>
<th>THEATRE’S PLACE IN CULTURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theatre attendees don’t seek theatre for theatre’s sake, they seek fulfillment of a diverse range of needs and desires</td>
<td></td>
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</tr>
<tr>
<td>Consumers now expect democracy and limitless options from things that once offered hierarchy and limited choice</td>
<td></td>
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</tr>
<tr>
<td>Audiences are forming new perceptions of entertainment as freed from format, always-accessible and customizable</td>
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<tr>
<td>Theatre has moved from culture to subculture and must find new ways to re-engage with an evolving world</td>
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</tbody>
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© 2008 Infinia Foresight
<table>
<thead>
<tr>
<th>MODERN ENTERTAINMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always On</td>
</tr>
<tr>
<td>Multiple sizes, formats, lengths</td>
</tr>
<tr>
<td>Increasingly Occasion-less</td>
</tr>
<tr>
<td>Increasingly Cross-Platform</td>
</tr>
<tr>
<td>Portable</td>
</tr>
<tr>
<td>Easily Accessible</td>
</tr>
<tr>
<td>Can be social or private</td>
</tr>
<tr>
<td>Includes grass-roots voices</td>
</tr>
<tr>
<td>Interacts with Pop-Culture</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MODERN THEATRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted by performance times</td>
</tr>
<tr>
<td>Few formats</td>
</tr>
<tr>
<td>Highly occasion-based</td>
</tr>
<tr>
<td>Exclusive to stage</td>
</tr>
<tr>
<td>Requires fixed location</td>
</tr>
<tr>
<td>Requires Travel</td>
</tr>
<tr>
<td>Requires social participation</td>
</tr>
<tr>
<td>Spoken for by established voices</td>
</tr>
<tr>
<td>Largely absent from Pop-Culture</td>
</tr>
</tbody>
</table>
• Full survey is complete
  – 1890 general population interviews
  – Oversample of 500 interviews from “Interested in the Arts” panel

• Basic statistics
  – Gender: 42% male | 58% female
  – Age: 26% 20s, 27% 30s, 21% 40s, 17% 50s, 10% 60s
    • Does not reflect weighting by “frequency” – i.e. audience distribution
  – Education: 33% completed graduate school | 38% completed college
    • Mirrors Broadway League numbers
  – Race & Ethnicity: 77% Caucasian | 11% Asian | 5% Black | 7% Other
    • 7% Hispanic overall
    • Exclusion of non-participants likely skews racial balance
  – Residence: 72% NY Net | 3% Bronx | 10% Brooklyn | 24% Manhattan | 15% Queens | 4% SI | 11% Westchester County | 18% NJ Net | 11% Fairfield County

• Results exclude the “hermit” segment, defined as those who attended less than 2 non-movie outings in the last two years
  – Rejections equaled 20.5% of general population
• We have reached the conclusion of our market research
• We are currently synthesizing all of our inputs into insights and implications on which to build marketing solutions
  – Qualitative (primary and secondary)
  – Quantitative
  – Expert Interviews
  – TDF research
• The following pages represent emerging insights and implications from this initial synthesis
  – Elaborating and clarifying ingoing hypotheses built on qualitative insights
  – New hypotheses driven by quantitative data and comparisons
• These insights will continue to evolve as we refine our research synthesis
  – Today should be as much worksession as presentation
  – Full results of the quantitative survey will be shared with TDF and Sandra Kresch
THEMES

1. Theatre’s Image in Culture
2. Broadway Branding & Tourism
3. Information Gathering & Awareness
4. Event vs. Routine
5. Ease & Accessibility
6. Price & Perceived Value
Theater’s Image in Culture
THEATRE’S IMAGE IN CULTURE

EMERGING INSIGHTS:

• Awareness of theatre is high, but it is losing the pop-culture popularity contest
• Without a clear voice, theatre is falling prey to stereotyping and misinformation
• Theatre’s perception of itself is out of step with its mainstream perceptions

EXPERT OPINION

“Theatre is totally ghettoized. I have good friends in the theatre world and even they seem to have a delusional idea of their place in culture.” - Mo Rocca

“The real distraction is that there are so many other things that didn’t exist 5 or 10 years ago that are equally enjoyable to theatre. There’s just more stuff you can do at home or on your portable device.” - Tom Cott

“A community can only support so much art, and the really successful organizations have found how to make their mission relevant to the communities that support them.” - Zannie Voss

AUDIENCE OPINION

“I’m not a huge theater buff. Unless I hear about it from friends, that they saw some great Off-Broadway show and I have to see it.”

“Broadway is kind of like going to Target or Wal-Mart. It’s more mainstream.”
### Which of the following kinds of professional entertainment have you attended in the past two years?

<table>
<thead>
<tr>
<th></th>
<th>In New York City:</th>
<th>Not in New York City:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any (net):</td>
<td>97%</td>
<td>Any (net):</td>
</tr>
<tr>
<td>Broadway musical</td>
<td>75%</td>
<td>Musical theatre</td>
</tr>
<tr>
<td>Off or Off-Off Broadway musical</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Broadway play</td>
<td>52%</td>
<td>Play</td>
</tr>
<tr>
<td>Off or Off-Off Broadway play</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Movie</td>
<td>68%</td>
<td>Movie</td>
</tr>
<tr>
<td>Other live music</td>
<td>49%</td>
<td>Other live music</td>
</tr>
<tr>
<td>Comedy</td>
<td>34%</td>
<td>Comedy</td>
</tr>
<tr>
<td>Classical music</td>
<td>19%</td>
<td>Classical music</td>
</tr>
<tr>
<td>Opera</td>
<td>19%</td>
<td>Opera</td>
</tr>
<tr>
<td>Gallery opening</td>
<td>19%</td>
<td>Gallery opening</td>
</tr>
<tr>
<td>Modern dance</td>
<td>13%</td>
<td>Modern dance</td>
</tr>
<tr>
<td>Classical dance</td>
<td>10%</td>
<td>Classical dance</td>
</tr>
<tr>
<td>Performance art</td>
<td>11%</td>
<td>Performance art</td>
</tr>
<tr>
<td>Reading</td>
<td>9%</td>
<td>Reading</td>
</tr>
</tbody>
</table>

S5 Which of the following kinds of professional entertainment have you attended in the past two years?  
General population sample  
Total base (n=1890)
ASPIRATIONS TO SEE PERFORMING ARTS REPORT AS VERY HIGH

- With the exception of live dance, the majority of respondents have an interest in attending theatre.
- Aspirations tend to be more passive than active for plays and Off and Off-Off Broadway.

Q8 How do you feel about each of the kinds of live performances listed below? Select the category that best fits your attitude.
General population sample
Total base (n=1890)

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BROADWAY STILL DOMINATES “LIVE ENTERTAINMENT” IN THE NEW YORK AREA

S6 Of all the listed kinds of performing arts, which one is your favorite?
General population sample
Total base (n=1890)
Time spent attending is holding its value, but the value of money spent shows a worrisome trend, and the arts’ perceived cultural value shows some weakness.
THEATRE’S IMAGE IN CULTURE:
KEY INSIGHTS

THEATRE’S PLACE IN CULTURE IS BECOMING A SPECIALTY; NOT SOMETHING THAT ENCOURAGES SPONTANEOUS INVOLVEMENT

THEATRE’S COMPETITION IS NOT WITH OTHER LIVE ENTERTAINMENT, BUT WITH OTHER ENTERTAINMENT OPTIONS ENTIRELY

STRONG INTEREST IN BROADWAY HITS ALONE MAY NOT BE ENOUGH TO SECURE THEATRE A STABLE PLACE IN CULTURE
Broadway Branding & Tourism
EMERGING INSIGHTS:

- The strength of Broadway’s branding as a destination overshadows the diversity of its shows
- Broadway’s association with tourists turns off many local New Yorkers
- Appeal for tourist dollars has led to a “Disney-fication” of productions

AUDIENCE OPINION

"It has a certain prestige… not 'I went to a bar' but 'I went to BROADWAY.'"

“When I think Times Square I think cattle call.”

EXPERT OPINION

“There’s snobbishness from the theatre lovers who had a different behavior than the people who were newer to the art form and coming for different reasons. And until we find a way to accommodate both groups, that’s going to be an issue.” - Tom Cott

“Too often, stereotypes rule and good content is overlooked.” - Mo Rocca

“I don’t think we give people credit enough to know what Broadway is. People know what it is. It’s not a generic decision. People need to know why they need to see a particular thing.” - Tom Cott
BROADWAY BRANDING: IMPRESSIONS OF THE AUDIENCE

BROADWAY
- OLD PEOPLE
- FAMILIES
- OUT OF TOWNERS
- TOURISTS
- PARENTS

OFF & OFF-OFF BROADWAY
- INSIDERS
- PURISTS
- ADULTS
- NEW YORKERS
- FREQUENT THEATRE-GOERS
- ACTORS
BROADWAY BRANDING: IMPRESSIONS OF CONTENT

BROADWAY
- CHEESY
- DISNEY
- CONSISTENT
- CANNED
- MAINSTREAM
- LIKE NETWORK TV
- CONTRIVED
- ENTERTAINING
- MUSICALS

OFF & OFF-OFF BROADWAY
- ARTSY
- EDGY
- RISKIER
- AUTHENTIC
- NICHE/ACQUIRED TASTE
- LIKE HBO
- CHALLENGING
- PLAYS

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BROADWAY BRANDING: IMPRESSIONS OF THE EXPERIENCE

BROADWAY

- AMAZING SETS
- HIGH LEVEL OF TALENT
- MORE BELLS & WHISTLES/MOVIE-LIKE/EXTRAVAGANT
- CATTLE CALL
- CABLE CALL
- SPECTACULAR
- TIMES SQUARE
- RIGID
- FORMAL/GLAMOROUS

OFF & OFF-OFF BROADWAY

- MINIMALIST
- EMERGING TALENT
- BUDGET
- SMALL THEATRE
- INTIMATE
- DOWNTOWN
- CASUAL

THE ATTENDANCE EXPERIENCE

© 2008 Infinia Foresight
Even big budget productions are not considered formulaic.
MUSICALS APPEAR MORE TOURISTY THAN DESIRED

Q23 If you were to attend PERFORMANCES, ideally how much would you want them to have each characteristic listed below? 1=Do not want it at all, 7=Want it very much

Q24 Based on your recent experience, how much do you agree that each statement or phrase below describes PERFORMANCES being produced today? (Users)

Q24a Based on any impressions you have, how much do you agree that each statement or phrase below describes PERFORMANCES being produced today? (Non-users)

1=Strongly disagree, 7=Strongly agree, Top 2 box

General population + oversample

© 2008 Base Foresight who most prefer this performance type
PEOPLE’S STRONGEST DESIRES REMAIN ENTERTAINMENT AND FUN

- The desire for spectacle only applies to musicals and dance
- The terms “Relaxing” and “Escaping” don’t resonate with most audience members

Q23 If you were to attend PERFORMANCES, ideally how much would you want them to have these characteristics? 1=Do not want it at all, 7=Want it very much
Top 2 box
General population + oversample
Base = those who most prefer this performance type

© 2008 Infinia Foresight
INTELLECTUAL DESIRES VARY WIDELY, AND ARE SURPRISINGLY LOW OVERALL

Q23 If you were to attend PERFORMANCEs, ideally how much would you want them to have these characteristics? 1=Do not want it at all, 7=Want it very much

Top 2 box
General population + oversample
Base = those who most prefer this performance type

© 2008 Infinia Foresight
AT MUSICALS, THE COMMUNAL EXPERIENCE TRUMPS EXPECTATIONS

Audiences appear savvier about content than the unique benefits of live performance

Q23 If you were to attend PERFORMANCEs, ideally how much would you want them to have these characteristics? 1=Do not want it at all, 7=Want it very much
Q24 Based on your recent experience, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (users)
Q24a Based on any impressions you have, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (Non-users)
1=Strongly disagree, 7=Strongly agree, Top 2 box
General population + oversample
Base = those who most prefer this performance type

© 2008 Infinia Foresight
PLAYS RELY ON INTELLECTUAL MERITS, BUT FALL SHORT OF EXPECTATIONS

Results also indicate low expectations around “high culture,” edginess or contemporary stories

Q23 If you were to attend PERFORMANCEs, ideally how much would you want them to have these characteristics? 1=Do not want it at all, 7=Want it very much
Q24 Based on your recent experience, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (users)
Q24a Based on any impressions you have, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (Non-users)
1=Strongly disagree, 7=Strongly agree, Top 2 box

General population + oversample

Blue Earth

© 2008 Infinia Foresight
who most prefer this performance type
OFF/OFF-OFF BROADWAY ARE AN EXCITING EXPERIMENT WITH MIXED RESULTS

This format may have the most opportunity to benefit from clarity and targeted positioning

---

Q23  If you were to attend PERFORMANCEs, ideally how much would you want them to have these characteristics?  1=Do not want it at all, 7=Want it very much
Q24 Based on your recent experience, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (users)
Q24a Based on any impressions you have, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (Non-users)
1=Strongly disagree, 7=Strongly agree, Top 2 box

General population + oversample

Biele Research who most prefer this performance type
A SINGLE “BROADWAY” EXPERIENCE DOES NOT MATCH THE DIVERSE EXPECTATIONS OF ITS AUDIENCE

BROADWAY’S STRONGEST DRAW—FUN AND ENTERTAINING THEATRE—SHOULDN’T BE CONFUSED WITH TOURISTY SPECTACLE

PLAYS AND MUSICALS ARE BOTH CONSIDERED ENTERTAINING, BUT WITH MARKEDLY DIFFERENT ATTRIBUTES

BROADWAY, OFF AND OFF-OFF BROADWAY SATISFY DIFFERENT DESIRES AND HAVE IMPLICITLY DIFFERENT BRANDS
Information Gathering & Awareness
INFORMATION GATHERING & AWARENESS

EMERGING INSIGHTS:

• Information about theatre is rich but difficult to navigate
• Knowledge about theatre is divided between the ‘haves’ and the ‘have-nots’
• Information about theatre must be sought out, and does not present itself readily to potential theatregoers

EXPERT OPINION

“To break through today’s crowded market you have to get out there. You need to share your content. Do Youtube 100%. Be generous with it.” - Mo Rocca

“For some events, really targeted marketing is your best approach. It might be that we do an event that we know will bring a particular audience, but if you don’t let them know, they won’t come.” - Alex Tyrell

“If you’re looking at where people are communicating and can invest yourself in those places, then you can curb complaints and put out the information you want to have out there.” - Zannie Voss

AUDIENCE OPINION

“The only time I hear about it is around the Tony’s.”

“Time Out is only good if you already know what you are looking for.”

“Finding out about the high profile stuff is easy, you just look in the Times.”
PEOPLE SEEM BROADLY CONFIDENT IN THEIR ABILITY TO RESEARCH OPTIONS

- Once they decide to see a show, they seem capable of navigating available sources
- Off-Broadway and Dance may indicate an opportunity to increase considered options

Q10 Thinking of the live performance types listed below, how easy is it for you to find information about specific shows so you can decide what you want to see?
General population sample
Total base (n=1890)

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THEATRE HAS A LACK OF SELF-IDENTIFIED “EXPERTS”

- Some may confuse “awareness” with “fluency”
- Off and Off-Off Broadway are off the collective radar; dance continues to be a specialized interest

Q6  How familiar do you feel with the opportunities in New York City for each of the kinds of live performances listed below? Select the category that fits best.

General population sample
Total base (n=1890)
INFORMATION GATHERING & AWARENESS: KEY INSIGHTS

PEOPLE CLAIM TO FIND THEATRE INFORMATION EASILY WHEN NECESSARY, BUT PASSIVE AWARENESS IS NOT DEEP—HENCE AN OPPORTUNITY

WORD OF MOUTH IS THE MOST INFLUENTIAL SOURCE OF THEATRE INFORMATION, BUT MOST PEOPLE DO NOT FEEL CONFIDENT IN THEIR ABILITY TO OFFER “EXPERT” OPINIONS—IDENTIFYING THE “INFLUENCERS” IS A CRITICAL MARKETING FOCUS

INFORMATION SOURCES ARE ONLY AS GOOD AS PEOPLE’S REASONS FOR SEEKING THEM; POTENTIAL THEATREGOERS MUST BE ACTIVATED IN OTHER WAYS
Event vs. Routine
EVENT VS. ROUTINE

EMERGING INSIGHTS:

- Theatre has struggled to translate its event-based format into a modern entertainment option
- Sparks of interest in theatre-going often lack kindling outside of the theatre
- Logistics like price point and intangibles like cultural awareness are barriers to routine attendance

EXPERT OPINION

“I believe that a sense of ownership can be engendered in a local community to support a theater. Whether that’s making a really nice bar where people can come hang out or making them feel a part of the building and what’s happening there, if people feel like locals then they’ll want to go.” - Alex Tyrrell

“I think there is a fundamental human desire for social, cool events. People like to go out, to dress up, to be in a crowd that is collectively doing something special.” - Mo Rocca

“We can’t compete with mass art forms because we’re not television, we’re not anything mass. We’re a handmade, small business.” - Tom Cott

AUDIENCE OPINION

“It’s a New York thing to do, but for when you have family in town.”

“It’s so expensive, I can’t afford to go often.”
3-4 PERFORMANCES EVERY TWO YEARS IS A REMARKABLY COMMON AVERAGE

Popularity of a performing art form appears irrelevant to its frequency

Mean attendance

<table>
<thead>
<tr>
<th>Art Form</th>
<th>All Resps</th>
<th>Attending Resps</th>
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</thead>
<tbody>
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<td>Broadway musical</td>
<td>2.8</td>
<td>3.7</td>
</tr>
<tr>
<td>Movie</td>
<td>7.6</td>
<td>11.2</td>
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<tr>
<td>Broadway Play</td>
<td>1.7</td>
<td>3.3</td>
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<tr>
<td>Other live music</td>
<td>2.3</td>
<td>4.7</td>
</tr>
<tr>
<td>Off or Off-Off Broadway play</td>
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<td>3.1</td>
</tr>
<tr>
<td>Comedy</td>
<td>0.9</td>
<td>2.7</td>
</tr>
<tr>
<td>Off or Off-Off Broadway musical</td>
<td>0.6</td>
<td>2.7</td>
</tr>
<tr>
<td>Opera</td>
<td>0.7</td>
<td>3.7</td>
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<tr>
<td>Classical music</td>
<td>0.7</td>
<td>3.6</td>
</tr>
<tr>
<td>Gallery opening</td>
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<td>3.7</td>
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<td>4.3</td>
</tr>
<tr>
<td>Reading</td>
<td>0.3</td>
<td>2.8</td>
</tr>
</tbody>
</table>

S7 How many times in the past two years would you estimate that you attended…?
General population sample
Total base (n=1890)
TICKETS ARE LARGELY SEEN AS AN ADVANCE PURCHASE

- Advance purchases may be chosen to guarantee high-quality seats
- Off and Off-Off Broadway are a more spontaneous ticket purchase - potentially because of price point

Q18 And the last time you attended a PERFORMANCE TYPE, when did you purchase the ticket?
General population + oversample
Base = those who most prefer this performance type and have attended this type of performance in last two years
EXPECTATION AND EXPERIENCE INDICATE
BROADWAY IS CASUAL BUT STILL SPECIAL

Non-users appear to strongly feel it would take something special to entice them to attend

Q23 If you were to attend PERFORMANCEs, ideally how much would you want them to have these characteristics? 1=Do not want it at all, 7=Want it very much
Q24 Based on your recent experience, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (users)
Q24a Based on any impressions you have, how much do you agree that each statement or phrase below describes PERFORMANCEs being produced today? (Non-users)
1=Strongly disagree, 7=Strongly agree, Top 2 box

General population + oversample
© 2008 Bischoff Foresight, who most prefer this performance type
LOW SCORES MAY INDICATE A LACK OF PASSION FOR THEATRE IN DAILY LIFE

Low scores overall – and throughout research, may indicate low levels of passion about the form

Q3. Now think only about live stage performances – plays, musicals, and dance. How much does each of the following statements describe you and your attitudes toward live (New York City) stage performances? 1 = not at all, 7 = very strongly

Top 2 box %

General population sample
Total base (n=1890)
LOW SCORES MAY INDICATE A LACK OF PASSION FOR THEATRE IN DAILY LIFE

Q3 Now think only about live stage performances – plays, musicals, and dance. How much does each of the following statements describe you and your attitudes toward live (New York City) stage performances? 1=not at all, 7=very strongly
Top 2 box %
General population sample
Total base (n=1890)
Q3 Now think only about live stage performances – plays, musicals, and dance. How much does each of the following statements describe you and your attitudes toward live (New York City) stage performances? 1=not at all, 7=very strongly
Top 2 box %
General population sample
Total base (n=1890)
Q3 Now think only about live stage performances – plays, musicals, and dance. How much does each of the following statements describe you and your attitudes toward live (New York City) stage performances? 1 = not at all, 7 = very strongly

Top 2 box %

General population sample
Total base (n=1890)
EVENT VS. ROUTINE:
KEY INSIGHTS

THEATRE’S PERCEPTION AS A ‘SPECIAL EVENT’ IS DEEPLY ENTRENCHED AND NOT LIKELY TO CHANGE

HOWEVER, THEATRE COULD BECOME A MORE FREQUENT SPECIAL EVENT THROUGH A COMBINATION OF POSITIONING AND MARKETING

THEATRE MARKETING HAS AN OPPORTUNITY TO MORE FULLY LEVERAGE PEOPLE’S VALUES AND MOTIVATIONS INTO SHARPER REASONS FOR ATTENDING
Ease & Accessibility
EASE & ACCESSIBILITY

EXPERT OPINION

“We’re in the 21st century, still making it impossible for people to come see theater -- we put all these roadblocks in the way.” - Tom Cott

“Right now the hurdles to get over are the things we traditionally relied on: capacity filled with subscribers, critique in the local newspaper. A lot of that is just so unimportant to the generation that’s 26 and under.” - Zanie Voss

“If you had a better customer service experience and gave people the information they need when they want it, made them feel welcome and made the invitation appealing, I think we would have a much easier time of selling what we’re doing.” - Tom Cott

EMERGING INSIGHTS:

• Theatre does not fit into people’s routines, habits and rituals

• Broadway theatre is difficult to get to, requiring advanced purchase, complex scheduling, transportation and other logistics

• Tickets are difficult to purchase and often suffer from a perception of unavailability

AUDIENCE OPINION

“I know you can stand in line for an hour and get tickets, but it’s just not possible with my lifestyle.”

“It takes a lot of planning.”
D2 If you were to go to a theatre in Manhattan from home, what mode of transportation would you most likely use?

General population sample
Total base (n=1890)
THE TIMES SQ. REBIRTH HAS MADE THE AREA SAFE, FAMILY FRIENDLY, AND EASY

D3 How hard / easy is it for you to get from home to Times Square for theatre?
D4 Once you reach Times Square, how hard / easy is it for you to navigate to your destination?

General population sample
Total base (n=1890)
PERCEPTIONS OF BROADWAY TICKET AVAILABILITY ARE LOWER THAN REALITY

May be partially due to marketing messaging emphasizing ticket scarcity for shows

Q14 How likely do you think it is that tickets for most performances of this kind of event would be sold out if you tried to buy some?

General population sample

Total base (n=1890)
Q17  The last time you attended a PERFORMANCE TYPE, how did you purchase the ticket?
General population + oversample
Base = those who most prefer this performance type and have attended this type of performance in last two years
RESPONDENTS REPORTED FEW MEANINGFUL HINDRANCES TO ATTENDING

Q26 Which of the reasons below keep you from attending PERFORMANCEs in New York City more often?

“Major issue”
Total base

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NEGATIVE PERCEPTIONS AROUND EASE AND ACCESSIBILITY MAY DISSUADE PEOPLE FROM INITIALLY CONSIDERING A TRIP TO THE THEATRE, BUT ARE NOT BARRIERS ONCE A DECISION HAS BEEN MADE.

THE INTERNET IS DISPROPORTIONATELY THE TICKET-BUYING CHANNEL OF CHOICE, MAKING ITS POTENTIAL AS A KEY MARKETING CHANNEL SIGNIFICANT.
Price & Perceived Value

Here are the best seats which fit your search:

**Show:**
Spamalot - New York City
Shubert Theatre

**Performance:**
Sunday, December 21, 2008 at 7:00 PM

**Seats:**
2 Tickets, Center Orchestra Row D, Seats 103-104
4 rows from Stage. Seat 103 is 3 seats off aisle.
Seating Chart

**Total Price:**
Tickets ($115.50 each): $203.00
Service Charge ($7.00 per ticket): $14.00
Handling Charge ($2.50 per order): $2.50
**Total Cost:** $249.50

Price includes a $1.50 Facility fee per ticket.

The handling fee may change based on how you choose to have your tickets delivered. You will be asked to select your delivery preference after you enter your billing information.

**Note:** You have 2:40 minutes to decide if you want these tickets.

These tickets are a one-time offer only. If you choose to search for other seats, these seats will be put back into the system for sale to another customer. You may not be able to get these seats again.

**Important Notice:**
Please note: The ticket limit is 10 tickets per 7 day period, per name, per credit card account, and/or billing address (e-mail address). Tickets purchased which exceed this limit will be canceled without notification. Certain types of seating may have a different ticket limit.

Did you know you can use your [American Express Membership Rewards](https://www.americanexpress.com) to purchase tickets?
PRICE & PERCEIVED VALUE

EMERGING INSIGHTS:

• Although theatre is fairly priced, people perceive it as too expensive
• Price is a major hurdle to regular theater attendance
• Prices are high compared to other forms of entertainment, creating a difficult risk/value equation

EXPERT OPINION

“Price is definitely a factor which brings people to the movies, but I think it’s also that Hollywood is just better at coming up with relevant narratives more quickly.” - Natalia de Cuba Romero

“Broadway has priced itself out of the market.” – Anne Hamburger

AUDIENCE OPINION

“At first I thought it was expensive, but I loved it so much that I don’t regret it.”

“If i am sitting in front of my pc...and knowing i am going to spend those $100...in 2 sec (at that moment i am not thinking of the 3 hours of great entertainment ahead)...i hesitate. then you see the convenience fee. Tax. s & h.”

“Maybe it’s not all expensive. I just have the perception that it is.”
Q12 What do you think is a typical price for an average seat at this kind of performance?
General population sample
Total base (n=1890)

Mean price:
- Broadway musical: $106
- Broadway play: $97
- Off Bway production: $54
- Dance performance: $67

PERCEPTION OF AVERAGE SEAT PRICE APPEARS ACCurate
PERCEPTION OF PRICE APPROPRIATENESS TENDS TOWARDS PREMIUM

- Broadway’s price, on average, is perceived as demanding a special night out
- Off and Off-Off Broadway are priced more in line with a routine behavior

Q13  And how do you think about the cost of tickets to this kind of performance?
General population sample
Total base (n=1890)
PRICES ARE SEEN AS ABSOLUTELY HIGH, BUT WORTH IT

Q26 Which of the reasons below keep you from attending PERFORMANCEs in New York City more often?

“Major issue”
Total base

© 2008 Infinia Foresight
THEATRE IS OFTEN DESCRIBED AS “TOO EXPENSIVE,” YET BY AND LARGE EVERYONE BELIEVES THE EXPERIENCE IS “WORTH THE PRICE”

BROADWAY’S PRICE REINFORCES ITS POSITION AS AN OCCASIONAL EVENT, BUT RESTRICTS IT FROM BECOMING A MORE REGULAR RITUAL

BROADWAY’S PREMIUM PRICE POINT MAY BIAS PERCEPTIONS OF THEATRE MORE GENERALLY AS A SPECIAL OCCASION

OFF/OFF-OFF BROADWAY PRICING COULD POSE AN ENTRY POINT FOR MORE ROUTINE BEHAVIOR FOR SOME AUDIENCES
DEFINING THEATRE’S CORE CHALLENGES

• Theatre currently has an image, price and positioning that support it being a special, worthwhile occasion, but may discourage regular attendance

• Theatre’s content and experience do not yet market themselves in a differentiated way to match the diversity of its audiences’ competing wants and desires

• Broadway Theatre is a luxury experience being packaged as a “mass” consumable

• Off and Off-Off Broadway’s distinct positioning and entry-level price point are underleveraged

• Theatre has relied too heavily on its live experience to forge connections and relationships with its audience, and seldom explicitly connects beyond the venue

• Theatre has approached its challenges from the standpoint of increasing volume rather than building consumer relationships

• Theatre’s key barriers seem to be less logistics-related and primarily due to low cultural relevance and pervasive competition from other entertainment options
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<th>Goal</th>
<th>Immediate</th>
<th>Long-Term</th>
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<tr>
<td><strong>Audience</strong>&lt;br&gt;Current &amp; Potential</td>
<td>Broaden and deepen attendance through strategic marketing</td>
<td>• Update marketing channels and communications to help more people stay aware, engaged, attending&lt;br&gt;• Use motivational segmentation of consumers to sharpen targeting &amp; relevance of marketing efforts&lt;br&gt;• Reposition theatre arts to reignite interest and attendance by a robust cross-section of people</td>
<td>• Leverage cutting-edge channels and technologies to help theatrical marketing reach its broadest potential audience&lt;br&gt;• Instigate dialog in the culture at large about theatre’s unique experience</td>
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<td><strong>Producers</strong>&lt;br&gt;Commercial &amp; NFP</td>
<td>Enhance audience reach and engagement through a more effective marketing toolkit</td>
<td>• Develop a “toolkit” of modern technology, tactics, channels and messages that will drive faster word-of-mouth and broader awareness and excitement&lt;br&gt;• Aid in targeting differentiated audiences with tailored messages and marketing</td>
<td>• Set a new marketing standard in which producers consistently leverage theatre’s distinctiveness and latent consumer appeal to maximize their potential audience</td>
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<td><strong>TDF</strong></td>
<td>Build a stronger leadership platform to drive industry and audience growth</td>
<td>• Disseminate new insights and perspectives throughout the industry&lt;br&gt;• Enhance existing and/or create new programs and tools to promote audience growth initiatives</td>
<td>• High-level operational implications from these new programs and goals</td>
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<td><strong>Patrons</strong></td>
<td>Increase support for TDF and theatre-arts</td>
<td>• Position theatre to inspire greater support and a more nuanced understanding of its “value”&lt;br&gt;• Segment funding efforts and subsidies to better align with a diversity of content and formats</td>
<td>• Promote the thrill of evolving “sustainable theatre practices,” vs. supporting an endangered species&lt;br&gt;• Innovate funding models to expand the base of resources in an additive way</td>
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THANK YOU