Motivating Millennials: The Next Act in Creating Theatre Patrons

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Abstract

Why are millennials attending theatrical productions less frequently than any other generation before them? In a new digital era—full of high prices and limited recreational time—the millennial's attention is constantly pulled in multiple directions by corporate entities that have learned how to appeal to them. In order to attract the millennial, theatre companies must adopt marketing strategies tailored to the younger consumer, thus developing and creating a lifelong patron in the process. Based on original survey findings and examination of existing data, this study provides recommendations to theatres on how to reevaluate their marketing strategies to best attract this elusive demographic.

Purpose of Study

This study examines a gap in research on participation trends in theatres. The Theatre Communications Group (TCG) produces an annual report based on analysis of not-for-profit theatre trends, but the report does not provide a breakdown of the data based on age or other demographics (Voss, Giraud, Voss, Rose, and Baskin). The National Endowment for the Arts (NEA) conducts comprehensive studies of arts participation trends (the last survey data is from 2012) that break data down by demographics. All other studies published within the last five years aggregate theatre with other live performing arts including live music events (National Endowment for the Arts, 2013). Because of the rapid advances in technology, especially increasing social media and smart phone use, data from 2012 is not very relevant to the current industry environment.

According to past NEA studies, there has been a statistically significant decline in theatre participation among 18-34 year olds [*See Exhibit 1 for full statistical breakdown]*, (National Endowment for the Arts, 2013). There are many assumptions about participation trends in this demographic, commonly referred to as 'millennials,' but scarce available data to confirm or discredit the assumptions. This study examines the participation trends among 18-30 year olds in order address these assumptions and develop marketing strategies to counter this decline.

Introduction

Theatres recognize the value of having younger audiences in their seats: those who become arts patrons early in life often become arts patrons for life. Yet even with what appear to be enticing offers, including discounted or even free tickets, attendance among this demographic has been declining. This study examines non-profit theatre participation and provides recommendations to address the issue of low theatre performance attendance by the 18 – 30 year old age demographic. The conclusions were developed based on three major research areas:

1. Primary data collection from an original survey of 220 patrons; 187 of these self-identified as 18-30 years old [Note: Not all respondents responded to all questions]
2. Primary data collection from an original survey or interview of 9 active regional theatres in the New York, New Jersey, and Eastern Pennsylvania geographic areas [Note: Not all respondents responded to all questions]
3. Secondary data analysis from accredited organizations including the National Endowment for the Arts (NEA), Theatre Communications Group (TCG), and directly from active theatres or theatre affiliates

Key Findings

Content is King

The high cost of tickets is often cited as the greatest barrier to millennials attending theatre performances. However, this study reveals that millennials still value content above all other factors; they are willing to pay a high price as long as they perceive proportionate value in the programming.

Match Marketing Dollars to Millennial Values

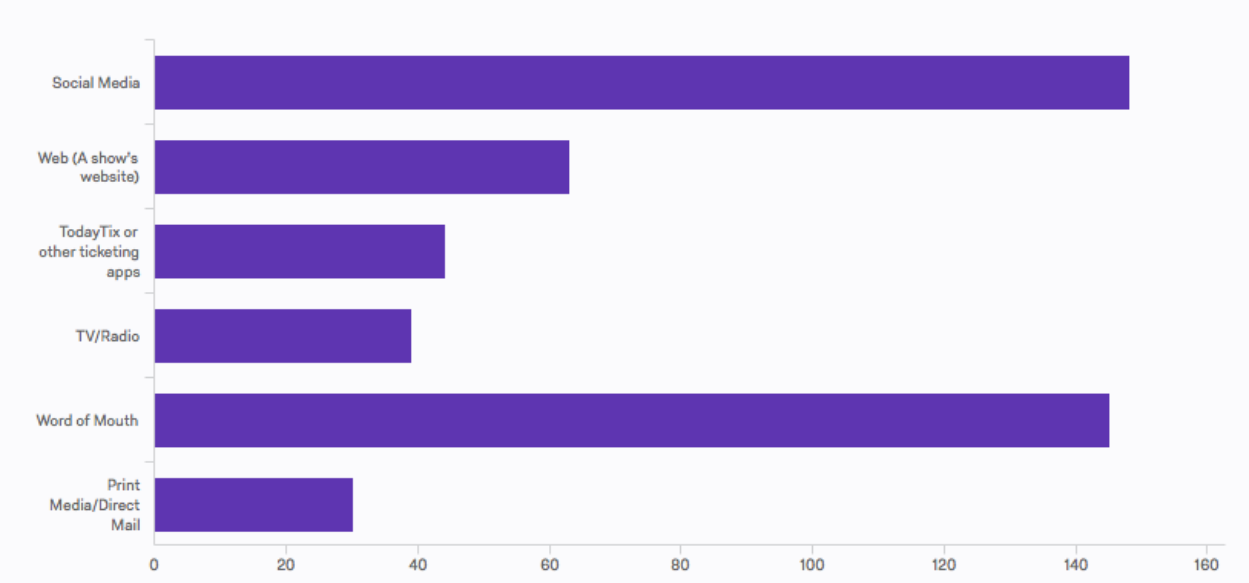
Get digital and go social. As digital technologies rapidly develop, so do the opportunities to further engage audiences with live theatre, making it more convenient, personal, and accessible. Most millennials access their media digitally; mobile devices and social media networks are integrated into their lives. Yet, many theatre organizations are still spending the majority of their budgets on print and traditional media. In order for theatre marketers to most effectively attract and retain the millennial demographic, they must reexamine and update their marketing dollar distributions to match digital media trends.

Data Analysis — KEY PATRON SURVEY RESULTS

Communicating with Patrons

Based on 182 responses from respondents that self-identified as 18-30 years old, the following chart represents the results of the question:

> "If you did not participate in creating the show, or if you do not know an individual involved in the show, how do you hear about live musical or nonmusical stage plays you attend? Please select all that apply." (Mashel, "Theatre Patron Participation")



81.32% of respondents selected **Social Media**

79.67% of respondents selected **Word of Mouth**

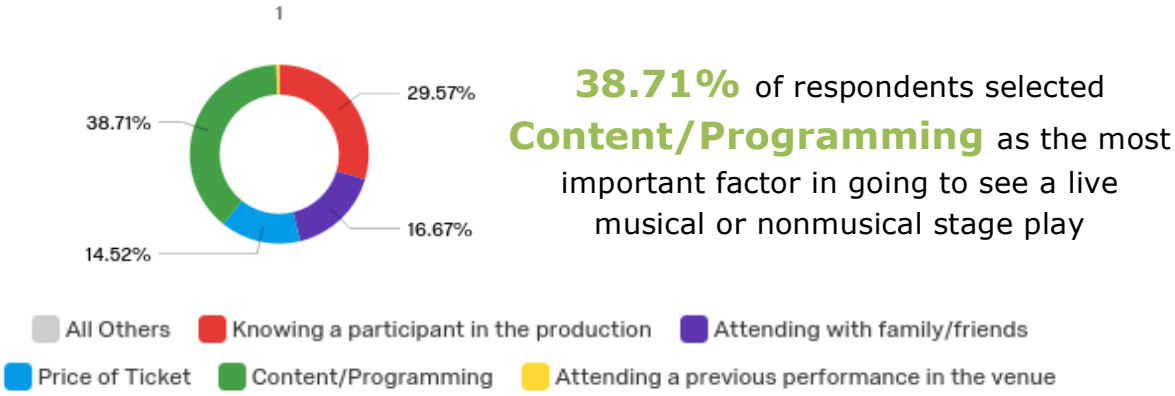
The top two responses to this question are "Social Media" and "Word of Mouth," revealing that these outlets are the best way to communicate performance offerings to millennials. Furthermore, these top two responses are linked; social media drives word of mouth. One respondent comment encompassing this link was "*I like to know if the box offices are doing well for the performance, and if the content is interesting enough to listen to/watch without prior knowledge of the content,"* (Mashel, "Theatre Patron Participation"). Social media platforms are the ideal media source to share information including box office successes and previews of content because patrons can then share their opinions within their social networks and within the greater patron community.

These responses reveal that social media is the most important platform for communicating with millennials. Theatres that wish to attract this demographic need to develop a social media presence and put marketing dollars toward targeting patrons on this platform.

See Exhibit 2 for full statistical output of the question results.

Factors Determining Attendance

Based on 186 responses from respondents that self-identified as 18-30 years old, the following chart represents the percentage breakdown of the most important factor to a patron attending a performance, (Mashel, "Theatre Patron Participation").

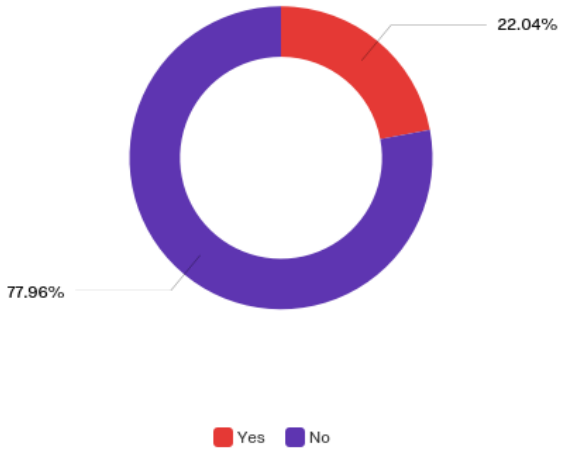


The results of this question disprove the commonly held assumption that price is the most important factor, and therefore the greatest barrier, to millennials attending performances. Only **14.52%** of respondents reported price as the most important factor to them in attending a performance. Further discrediting this assumption, greater percentages of respondents reported 'Knowing a participant in the production' and 'Attending with family/friends' as more important factors than price, (Mashel, "Theatre Patron Participation").
Based on open-response question comments, millennials perceive that the price they are willing to pay for a performance depends on the professional level of the performance – that is, a patron is willing to pay less for a community theater performance, more for a regional performance, and significantly more for a Broadway performance. One respondent comment encompassing this perception was, "*I'd easily pay $100+ for Hamilton but if my friend's community theater show cost $30 I'd [complain] about it [or] probably try to usher*," (Mashel, "Theatre Patron Participation"). This thought process, however, is linked to the perceived quality of the performance and therefore the content and programming. This data demonstrates that "Content/Programming" is the most important factor, significantly more important than price. Patrons are willing to pay more for a Broadway performance because they value the actors' performances, production designs, and the overall experience of attending at a higher level than at a regional theatre with unknown content and programming. If non-profit regional theatres add real and perceived value to their programming and successfully communicate that to patrons, then even millennials will be willing to pay the price the theatre sets.

See Exhibit 4 for full statistical output of the question results.

Student and Aged-Based Discounts

Based on 186* responses from respondents that self-identified as 18-30 years old, the following chart represents patrons who have taken advantage of student or under 30 deals in the last 12 months, (Mashel, "Theatre Patron Participation").



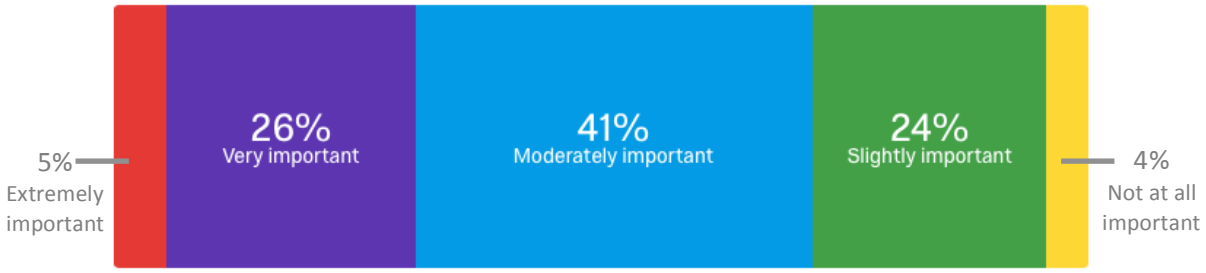
**82% of these respondents reported attending at least one performance in the last 12 months.*

According to these results, **fewer than one quarter** of patrons are actually using student and under 30 deals. 82% of respondents aged 18 – 30 years old attended at least one performance in the last 12 months, but only 22.04% of total respondents took advantage of these pricing deals. There are two key explanations for this disparity: (1) Patrons are not informed of these discounts and therefore targeted marketing methods need to be improved and/or (2) this data reinforces the result from the previous section, "Factors Determining Attendance," that even millennials are willing to pay full price for a ticket. Though student deals are important, discounts are not the most important way to drive millennials to the theater.

Prior Knowledge of Content

Based on 187 responses from respondents that self-identified as 18-30 years old, the following chart illustrates the results of the question:

> "With the exception of student high school performances, how important is it for you to have prior knowledge of the content/programming of a live musical or nonmusical stage play? For example, access to a summary, preview video, pre-performance talk, character interviews, etc," (Mashel, "Theatre Patron Participation").



These responses created a near exact normal curve distribution. This reveals that prior knowledge of content and programming is significantly important to a majority of patrons. In examining open-response question comments, most respondents revealed that they do not require detailed content. The following are examples of these responses:

> *"Just some background information, nothing too in-depth."*
> *"A short summary addressing what the production is about and any contextual information that will aid my understanding."*
> *"A brief summary of what the play is about, but I don't want to be spoiled about the plot."*
> *"At the very least I just want to know the general plot/idea of a play before I see it. The easiest way is probably to have a short written description, and if it interests me I'll look up a more detailed version."*
>
> (Mashel, "Theatre Patron Participation")

Based on millennial trends, we believe pre-show content needs to be brief and it should be promoted through social media with key information presented clearly. More detailed content should be available to satisfy those patrons seeking additional information such as:

> *"The theme and main event of the plot intuited through advertisement. Preview supercut videos. Feature Articles in publications like Playbill, Broadway World, and the NY Times."*
> *"Video previews, I read reviews, interviews of participants. I almost always read a synopsis of any play I plan to attend."*
> *"For a musical, I prefer to listen to the soundtrack ahead of time."*
>
> (Mashel, "Theatre Patron Participation")

See Exhibit 3 for full statistical output of the question results.

Data Analysis — KEY THEATRE SURVEY RESULTS

Marketing Budgets

Six theatres provided the percentage breakdown of their marketing budgets. The aggregate budget created from this data reveals the greatest spending goes to print media and direct mail, at an average of 39% of the total budget, followed by spending on digital advertising (web, social media, and apps) at an average of 22% of the total budget. (Mashel, "Theatre Organization Research").

One factor that may account for this disparity is that digital media is often available at lower costs than print media. However, as evidenced by patron survey responses, theatre organizations that put money towards web and social media advertising are reaching the millennial demographic. As an example of this, The Wilma Theater, where the average age of a patron is 18–40, spends approximately 32% of its total marketing budget, above the aggregate average, on digital media, (Mashel, "Theatre Organization Research"). Organizations that do not put money towards digital media but wish to attract the millennial demographic should plan to redistribute their budgets.

Target Audience Definition

Seven out of the nine theatres reported that their target audience definition aligned with the typical performing arts patron demographic (patrons aged 45-65 years old, female, with disposable income, living within a 25 mile radius of the theater venue). These reports were determined in part by the results of the theatres' current patron data and therefore by revenue sources rather than a target audience determined by a strategic plan, (Mashel, "Theatre Organization Research").

Theatres want to attract younger patrons, yet they perceive the millennial demographic as outside their primary target market. While this seems prudent from a financial perspective, targeting this demographic is important in creating new lifelong theatre patrons. In order to reach the millennial demographic, it must be included in target market definition. One company, referred to as Theatre A by request, reported "one of our big initiatives is to get the 18 – 30 demographic into the theater." Theatre A is currently in the process of developing a targeted 21 – 30 year old post-show lounge experience to accomplish this initiative, (Mashel, "Theatre Organization Research").

Audience Outreach Initiatives

All of the theatres were asked to provide a written or verbal response to the question, "What is your most successful audience outreach initiative?" Three of the nine theatres reported their most

successful initiative revolved around a social experience created for patrons, (Mashel, "Theatre Organization Research"). The following are descriptions of some of these initiatives:

- ✓ George Street Playhouse Book Club: George Street Playhouse often produces plays based on novels. For these productions, the theatre connects with local book clubs to suggest the inclusion of the original novels and then sends a representative to discuss the play and its relation to the novel. This initiative "*brings in atypical theatregoers*." (Mashel, "Theatre Organization Research").

- ✓ Luna Stage Context Rooms: For every production, Luna Stage curates and develops an interactive museum room in their lobby that is available to explore before and after each performance. This initiative "*enhances the experience for the patron and it helps to brand [Luna Stage] and build loyalty.*" (Mashel, "Theatre Organization Research").

- ✓ Two River Theater Inside Two River: For every production Two River puts on 2 – 4 community events such as an interview with a jazz radio station, hosting caroling and crafting nights, film screenings, and more. "*Sales the day of these [initiatives] more than pays for their cost … people feel* ***valued***." (Mashel, "Theatre Organization Research").

Overall, these engagement initiatives create audience participation outside of the performance, provide extensive background information on productions, and ultimately make individual patrons feel valued. Other regional theaters would be wise to view these efforts as industry best practices.

It is important to demystify and humanize the experience of attending a performance, especially for patrons who have never performed or otherwise participated in producing theatre at a professional level. Focusing on audience outreach and engagement is vital to changing perceptions and ultimately to changing behaviors in millennials and all other age cohorts.

Recommendations

The following recommendations are based on the results of both surveys in conjunction with examination of secondary sources.

✓ **Theatres must create engagement experiences that extend beyond a performance**.

While this is key, there is not a single template for designing new initiatives. A program that is hugely successful for one theatre or an individual production may fail for another. The design of new engagement initiatives depends upon the resources, mission, and programming of each theatre company. When developing programs for millennial patrons, theatres should implement a social engagement feature that is designed upon experiences that are already successful with this demographic. For example, theatres could integrate an internal event or partnership with a local bar that includes live music, food, and drinks. The Wilma Theater, which defines its target audience as 18 – 40 years old, has implemented this best practice. The Wilma Theater has "*social events including Beer Night and our Young Friends night*." The Wilma Theatre has developed other engagement initiatives including, "*a lobby installation around [a production] to engage our audiences. For instance, [the play] WHEN THE RAIN STOPS FALLING had an installation exploring a sustainable Philadelphia [and] we worked with outside organizations, PLANT Group, Pennsylvania Horticultural Society, and the Franklin Institute*," (Mashel, "Theatre Organization Research").

Other theatres not within this study group that exemplify this best practice are Signature Theatre and Roundabout Theatre:

> Signature Theatre hosts Sig Socials, free parties at the Pershing Square Signature Center. The description for this program is "Hang out with friends and meet new ones while enjoying the festivities in Signature's beautiful Center. See a show and join the party after, or just come be Social!" ("Signature Theatre," 2016)
>
> Roundabout Theatre has a $25 ticket program called Hiptix for theatre patrons 18-35. Enrollment in the program is free, it allows users to purchase up to 2 tickets per production, and provides the ability to link accounts so that groups can attend together. Additionally, Roundabout hosts a post-show party after a specific performance during each production for Hiptix members, ("Hiptix," 2016).

✓ **Theatres should track digital Return On Investment (ROI) metrics.**

These are used to evaluate the success of marketing initiatives and make informed decisions on future expenses and initiatives. For example, by tracking click-throughs, theatres can determine what images, copy, and other content result in immediate purchases. George Street Playhouse exemplifies this best practice by tracking the ROI of every marketing output including email open rates and click-throughs, and purchases on the landing date of mailed print pieces. "We often include offers with direct mail, so we

can track based on a code the numbers of tickets we sell using that offer code," (Mashel, "Theatre Organization Research").

- ✓ **Theatres should continually update their marketing budget distribution** in order to match market trends and meet market demands.

The company TodayTix is a prime example of the importance of changes in digital media marketing. Originally designed for for-profit theatre companies, the application TodayTix, launched in 2013, serves as a successful case study for how to make theatre more appealing and accessible to millennials. The app and accompanying website, launched in October 2016, allow users to purchase theatre tickets at the best prices the day-of or week-of a performance from their mobile device. In an interview with TechDay, TodayTix co-founder Merritt Baer said:

> "TodayTix's core mission was to broaden access to theater by providing convenience in a way that was particularly meaningful to millennials. Today, 70% of TodayTix's 1 million+ users are millennials and our average ticket buyer is 30 years old – 14 years younger than the average Broadway ticket buyer," (TechDay, 2016).

While TodayTix still primarily serves for-profit theaters, the company successfully targets the underrepresented market of millennials, and TodayTix strategies can be adapted to fit the needs of non-profit theaters. For instance, Baer told TechDay that TodayTix founders saw the opportunity to "[appeal] to the millennial tendency of last minute purchasing," and to do so on mobile, a platform that many theatres and ticking companies were not investing in, (TechDay, 2016).

- ✓ **When marketing to millennials, theatres should promote through social media.**

Key and meaningful content must be presented quickly with clear links to purchase and access to more in-depth information. This capitalizes upon the millennial desires for speed, convenience, and gratification and considers the saturation of content present on social media.

The Theatres Leading Change (TLC) Initiative in 2011 examined dozens of producing strategies and their adherence to and affect on changes in the New York theatre industry. The 52nd Street Project, "an organization that has used theatre as a way to engage inner-city kids," represents a successful case study on how to target younger patrons through developing technologies:

> "Our initiative was to expand our online presence, our virtual community, … we wanted to see how we could engage with online tools to strengthen and build on the sense of real community that is a major part of the 52nd Street Project experience…We worked to make better use of social networks, Facebook in

> particular. We posted events. We shared photos from trips. We offered glimpses backstage, while in production, by sharing images of design in progress, like props and costumes for various shows. There is also an informal network that has grown up over the past year or so, on staff members' personal Facebook pages, with a lot of sharing with adult constituents. We launched our new website and made good use of that event; we've set up a blog, with staff members writing about their experiences at the Project. We're taking reservations online. We're organizing kid-created content to make available on the website," (Dunning, McDaniel, and ARTS Action Research, 2011).

One key finding in the study was, "Online relationships take as long as any kind of relationship to nurture and build," (Dunning, McDaniel, and ARTS Action Research, 2011). As theatres increasingly use digital platforms for communication, they must keep in mind that while using the correct platforms to place content is key, the content still has to be meaningful and engaging in order to create patron interest and loyalty. TLC later wrote in their report, "the whole discussion of audience is defined by a misaligned valuing system that is more related to a commercial perspective ("who is your customer") than to a humanistic perspective of value (audience members not as "consumers" of art, but as significantly engaged in the experience of the work and the community around it)," (Dunning, McDaniel, and ARTS Action Research, 2011). When approaching the millennial demographic, patrons need to feel that their age is not a barrier to accessing and engaging with the artistic work.

- ✓ **Theatres should encourage package renewal and ticket purchasing at the end of performances.**

Whether this is done in person, digitally, or both, this encourages patrons to return and builds patron loyalty. Most theatres send out a follow-up thank you email after a performance that includes a link to purchase for a future performance. Also including a time-sensitive discount code for such purchases would facilitate engagement with patrons by rewarding them for their loyalty. Some theatres have begun keeping their box offices open after performances end to encourage post-show ticket purchasing. Theatre A launched a renewal campaign at the end of their season last year where, for their last production, "*actors came out at the end of each show to talk about the theatre and why it was important to be a member.*" Theatre A ended its season with approximately $30,000 in subscriptions for the following season, (Mashel, "Theatre Organization Research").

- ✓ **Theatres should integrate new user-experience digital marketing technology that can make theatre more convenient, personal, and accessible.**

Beyond the importance of social media, it is vital to an organization's success to keep up with all digital technology trends. For example, because most millennials access the web from their mobile devices, websites that are not mobile-friendly frustrate patrons. User experience technology is always improving and theatres must strive to adapt to these

updates as quickly as possible. McCarter Theatre Center is "*launching a new website which will hopefully clearly identify and make it easier for people to purchase subscriptions (fixed and flexible) and single tickets*," through its new design that intended to make the purchasing experience more intuitive and easier to navigate, (Mashel, "Theatre Organization Research"). Two River Theatre is updating their CRM system to make their ticket purchasing more user-friendly and to create a smarter shopping cart that sends notifications for incomplete transactions, (Mashel, "Theatre Organization Research"). Companies like Capacity Interactive, a digital marketing consulting firm for the arts, are focused on adopting and adapting the newest marketing techniques for arts organizations. Capacity Interactive provide services and resources to improve social media strategies, online fundraising, and search engine marketing, ("Digital Marketing Consulting for the Arts," 2016).

Conclusion

The recommendations from this study revolve around two key themes: content and engagement. The most important marketing tactic in driving millennials to the theatre is to create engaging content beyond the performance. This can be a social experience, a digital relationship, or a platform to share experiences.

Beyond engaging patrons with the theatre, theatres should engage patrons, both loyal and prospective, with each other. While updating marketing budgets to meet digital preferences is not a quick task, there are simple ways to begin engaging patrons. One ideal method is to create a Facebook event for a performance. A Facebook event places a performance directly into a patron's social media network. It allows prospective patrons to see who else is planning to attend and to invite their friends. Having this digital version of an event to share creates a platform for patrons to share their experiences and directly engage with one another. Best of all, it costs zero marketing dollars!

Research Methods

DATA COLLECTION FROM SECONDARY SOURCES

The National Endowment for the Arts (NEA) conducts the Survey of Public Participation in the Arts (SPPA) approximately every five years in partnership with the U.S. Census Bureau, (National Endowment for the Arts, 2013). The SPPA is the most comprehensive longitudinal study of arts participation trends in America. Unfortunately, the 2012 data is the most recent data available. The 2012 SPPA reports statistically significant decline in arts attendance across all forms of arts consumption, including attendance at musical and non-musical plays, (National Endowment for the Arts, 2013). Because of the rapid advances in technology, including increasing social media and smart phone use, data from 2012 is not extremely relevant to the current industry environment. Furthermore, as with many other industries, the consumption of art has rapidly changed with these advances in digital technology. Consuming art through digital media, while included in the 2012 NEA SPPA, was not included in the 2008 SPPA survey; therefore no data is available to illustrate changes in this form of arts consumption in over time.

A shorter version of the SPPA, the Annual Arts Basic Survey (AABS) is published every year with "question topics [that] alternate between arts attendance, literary reading, and arts classes taken (for years ending in odd numbers) and personal performance or creation of artworks (for years ending in even numbers)," (National Endowment for the Arts . Results from the Annual Arts Basic Survey (AABS). Arts Data Profile #10). This data is very comprehensive and open to the public, including a cross tabulation creator available to examine the data using the individual questions included in the survey. While this makes the data user-friendly and easy to examine based on a wide range of demographics, the survey questions were not worded to be able to examine attendance and participation in musical and non-musical plays alone. Theatre is aggregated into a category of visual and performing arts events which also includes going to the movies, live music, dance performances, book readings, art exhibits, and touring monuments, among other events. The data is assumed to be drastically different from that of attendance and participation in musical and non-musical plays alone, especially when discerning participation trends among millennials.

INFORMATION NEEDS

The questions for the Theatre Patron Participation survey were developed in part through examination of the NEA national surveys language. However, the questions were developed with the intention to acquire the specific information applicable to theatre attendance in the 18 – 30 year old age demographic. The survey questions stemmed from some of the following research questions:

> *What is the most important attendance factor for patrons?*
> *Do patrons use student and youth targeted discount deals?*
> *Are the marketing methods that theatres are using effective?*

Simultaneously the Theatre Organization Research survey was intended to examine the above questions from the perspective of active regional theatres in the New York, New Jersey, and Eastern Pennsylvania geographic areas. Other research questions targeted at these organizations included:

Do the marketing dollars dedicated to outreach correlate with how patrons hear about performances?
What are the most effective outreach methods theatres are using?
Does an organization's target market differ from the patrons actually attending performances?

DATA COLLECTION FROM PRIMARY SOURCES

Both the Theatre Patron Participation and the Theatre Organization Research surveys were created using Qualtrics online software. The patron survey was targeted at 18-30 year olds. This survey included 4 demographic questions on age, gender, household income, and highest level of education. There were 8 other unique questions examining experiences and preferences concerning professional musical and non-musical theatre performances. One additional question concerning age based discounts was displayed only to respondents in the 18-30 age range. The "Theatre Patron Participation" survey was distributed via e-mail and through social network groups on Facebook. The survey allowed for complete anonymity unless a respondent chose to provide an email address to enter into a raffle. The sample size goal was 200 respondents and the data was finalized with 220 respondents. 187 of these respondents self-identified as 18-30 years old.

The organization survey was designed for open response from theatre professionals. This survey included 15 unique questions examining programming, marketing strategies, community outreach, and other strategies and tactics. The "Theatre Organization Research" survey was distributed via e-mail. Responses were either self-recorded by respondents or recorded by the researcher during phone interviews. The sample size goal was 8 respondents and the data was finalized with 9 respondents.

QUESTIONNAIRE DEVELOPMENT AND PRETESTING

The development of the patron survey began with a rough draft of questions that was reviewed by the researcher and the research advisor. It was pretested with a small group of peers and any problems or difficulties were noted and corrected.

The development of the organization survey began with a rough draft of questions that was reviewed by the researcher and the research advisor. It was pretested with two theatre professionals with marketing experience.

SAMPLING TECHNIQUES

The Theatre Patron Participation survey was a convenience sample, distributed primarily through Facebook social networks and email lists. Respondents were anonymous, but, based on distribution outlets, the majority of respondents came from The College of New Jersey students and alumni, Kean University students, University of Delaware students, and young theatre professionals who belong to theatre intern alumni groups across New York and New Jersey. As an incentive to encourage responses, at the end of the survey an option was placed to enter into a raffle for two tickets to TCNJ Musical Theatre's production of *The Addams Family*.

The Theatre Organization Research survey was also a convenience sample, distributed through email directly to Marketing Directors, Audience Services Coordinators, or the equivalent staff position of non-profit theatre organizations in New York, New Jersey, and Eastern Pennsylvania. Four of the nine organizations self-recorded their responses via the digital survey. The other five organizations were interviewed over the phone and the researcher recorded their responses. Responses from all nine organizations are aggregated to keep organizations anonymous and protect confidential information [unless the organizations provided specific permission to highlight best practices].

Limitations and Caveats

Because the Theatre Patron Participation survey used a non-probability sampling technique, the data contains convenience bias. Due to time and resource constrictions, the sample size is relatively small at only 220 total responses and 187 responses in the 18-30 year old age range. Additionally, the majority of respondents were female (72.73%) and individuals who had participated in theatre (74.55%).
Within the Theatre Organization Research survey, the lack of access to company data, especially financials, limits possible conclusions. Additionally, because the companies all have different organizational structures, the administrators interviewed have varied perspectives on their efforts and outreach.

Exhibits — KEY PATRON SURVEY RESULTS

Exhibit 1 — The 2012 NEA Survey of Public Participation in the Arts, Pages 16-17

"This study reports a decline in musical play attendance, the first statistically significant change in this activity since 1985. Additionally, non-musical play attendance has dropped at a 33 percent rate over the last decade," (National Endowment for the Arts, 2013).

MUSICAL THEATER
Age 18-24
2008:14.5%
2012: 13.0%
Age 25-34
2008: 16%
2012:13.6% (statistically significant)

NON-MUSICAL THEATER
Age 18-24
2008: 8.2%
2012: 6.4% (statistically significant)
Age 25-34
2008: 9.2%
2012: 7.5% (statistically significant)

	2002	2008	2012	change	rate of change
Musical Play	17.1%	16.7%	15.2%	-1.5pp**	-9%**
Non-Musical Play	12.3%	9.4%	8.3%	-1.1pp**	-12%**

Exhibit 2 — Statistical output of Theatre Patron Participation Survey Question: *"If you did not participate in creating the show, or if you do not know an individual involved in the show, how do you hear about live musical or nonmusical stage plays you attend? Please select all that apply,"* (Mashel, "Theatre Patron Participation").

#	Field	Choice Count	
1	Social Media	81.32%	148
2	Web (A show's website)	34.62%	63
3	TodayTix or other ticketing apps	24.18%	44
4	TV/Radio	21.43%	39
5	Word of Mouth	79.67%	145
6	Print Media/Direct Mail	16.48%	30
			182

Exhibit 3 — Statistical output of Theatre Patron Participation Survey Question: "*With the exception of student high school performances, how important is it for you to have prior knowledge of the content/programming of a live musical or nonmusical stage play? For example, access to a summary, preview video, pre-performance talk, character interviews, etc,"* (Mashel, "Theatre Patron Participation").

#	Field	Choice Count	
1	Extremely important	5.35%	10
2	Very important	25.67%	48
3	Moderately important	40.64%	76
4	Slightly important	24.06%	45
5	Not at all important	4.28%	8
			187

Exhibit 4 — Statistical output of Theatre Patron Participation Survey Question: *"With the exception of student high school performances, please rank the most important factors to you in going to see a live musical or nonmusical stage play.*
1 = The most important
5 = The least important
(Mashel, "Theatre Patron Participation").

#	Field	1		2		3		4		5		Total
1	Knowing a participant in the production	29.57%	55	17.74%	33	12.90%	24	26.88%	50	12.90%	24	186
2	Attending with family/friends	16.67%	31	26.88%	50	30.65%	57	21.51%	40	4.30%	8	186
3	Price of Ticket	14.52%	27	32.80%	61	28.49%	53	20.43%	38	3.76%	7	186
4	Content/Programming	38.71%	72	20.43%	38	22.04%	41	16.13%	30	2.69%	5	186
5	Attending a previous performance in the venue	0.54%	1	2.15%	4	5.91%	11	15.05%	28	76.34%	142	186

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Knowing a participant in the production	1.00	5.00	2.76	1.44	2.09	186
Attending with family/friends	1.00	5.00	2.70	1.11	1.23	186
Price of Ticket	1.00	5.00	2.66	1.07	1.15	186
Content/Programming	1.00	5.00	2.24	1.20	1.44	186
Attending a previous performance in the venue	1.00	5.00	4.65	0.74	0.54	186

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