

~ COUNCIL FOR LIVING MUSIC ~

Council For Living Music

Broadway Musical Theatergoer Study

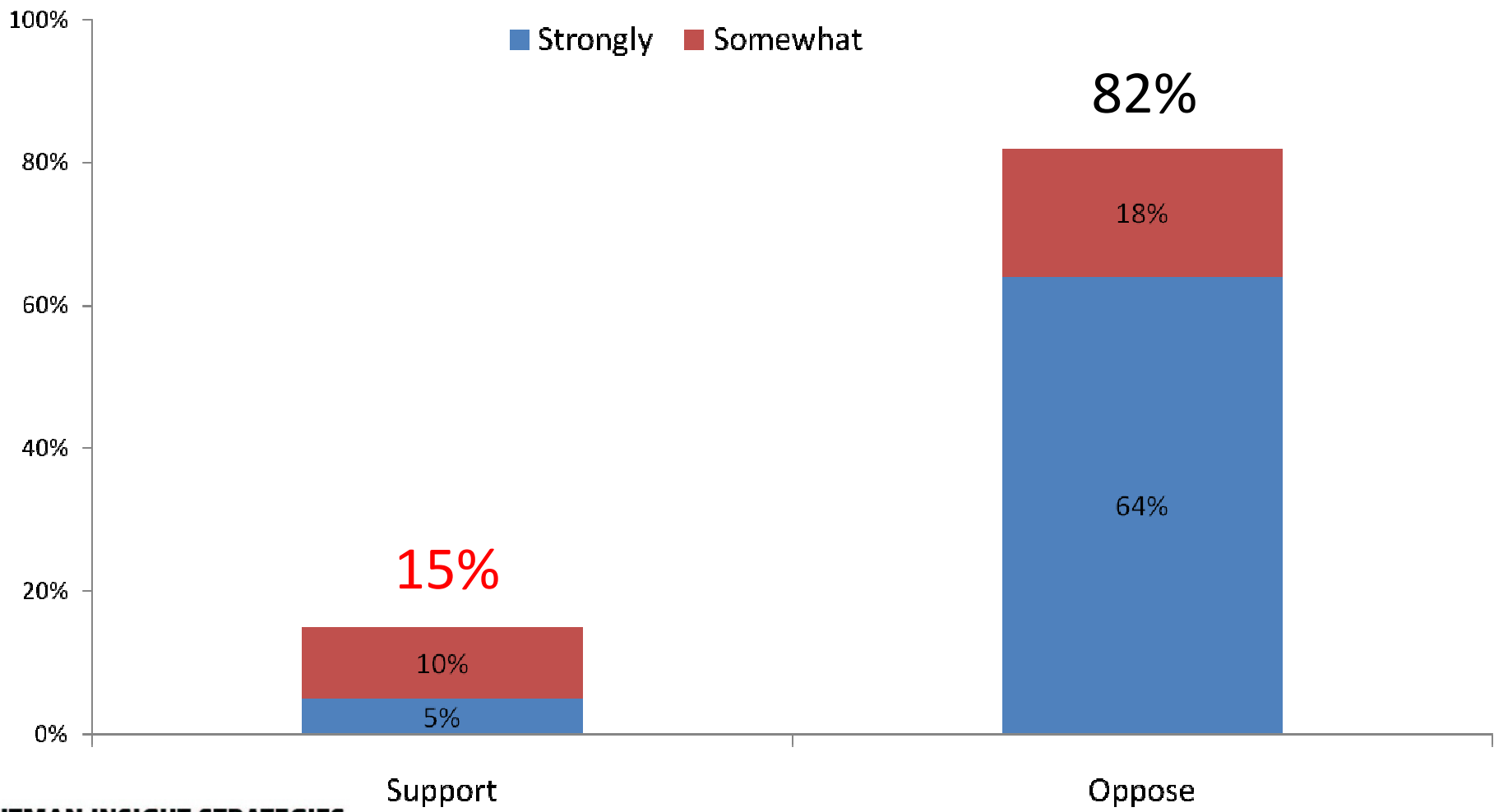
April 20, 2011

Methodology

- Whitman Insight Strategies conducted 704 interviews among Broadway Musical theatergoers from April 2 to April 12, 2011
- We employed a mixed-mode survey methodology which consisted of both telephone interviews and in-person interviews at the Times Square TKTS booth
- To qualify for the study, respondents must have attended at least 1 Broadway Musical in the past year
- Margin of error is +/- 3.63% at the 95% level of confidence

More than 8 in 10 oppose replacing live musicians with pre-recorded music

As you may know, in some cases producers have begun to replace live musicians in Broadway orchestras with pre-recorded music, resulting in fewer live musicians than in the past. Do you support or oppose producers replacing live musicians with pre-recorded music in Broadway Musicals?

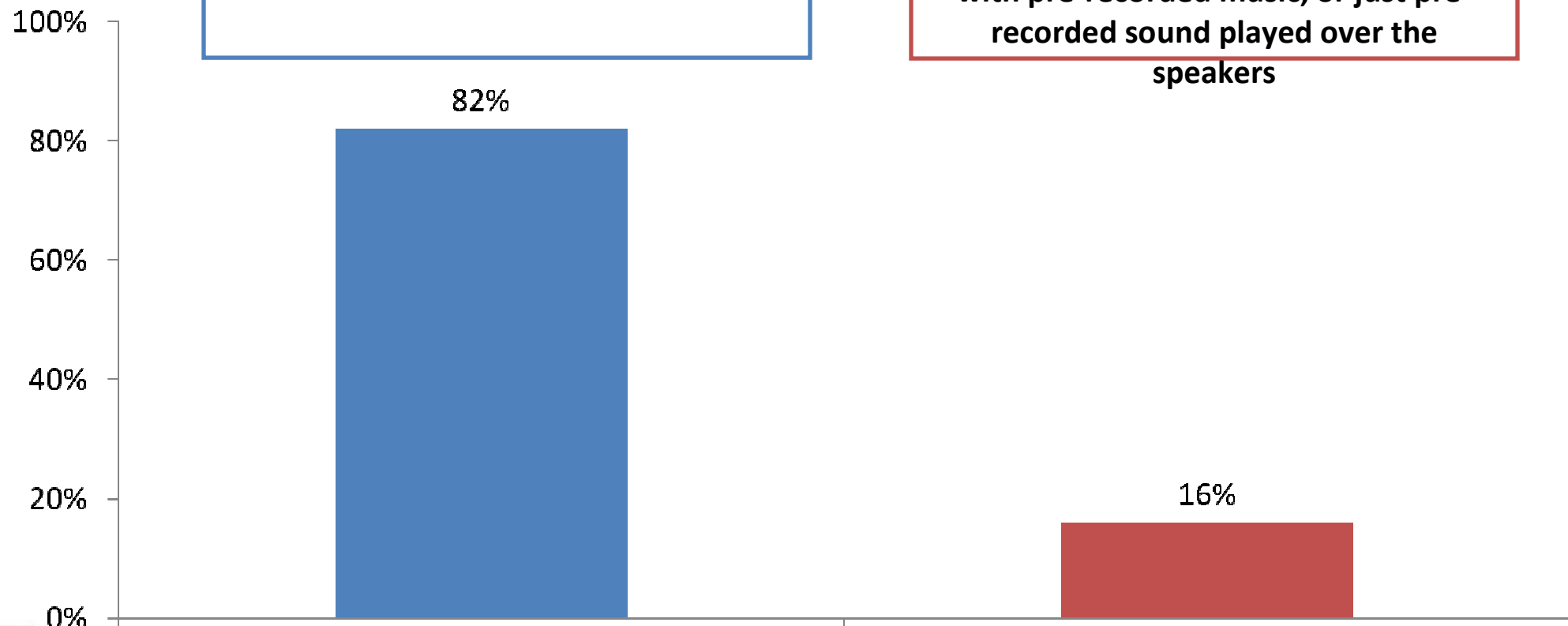


More than 8 in 10 say live music is essential

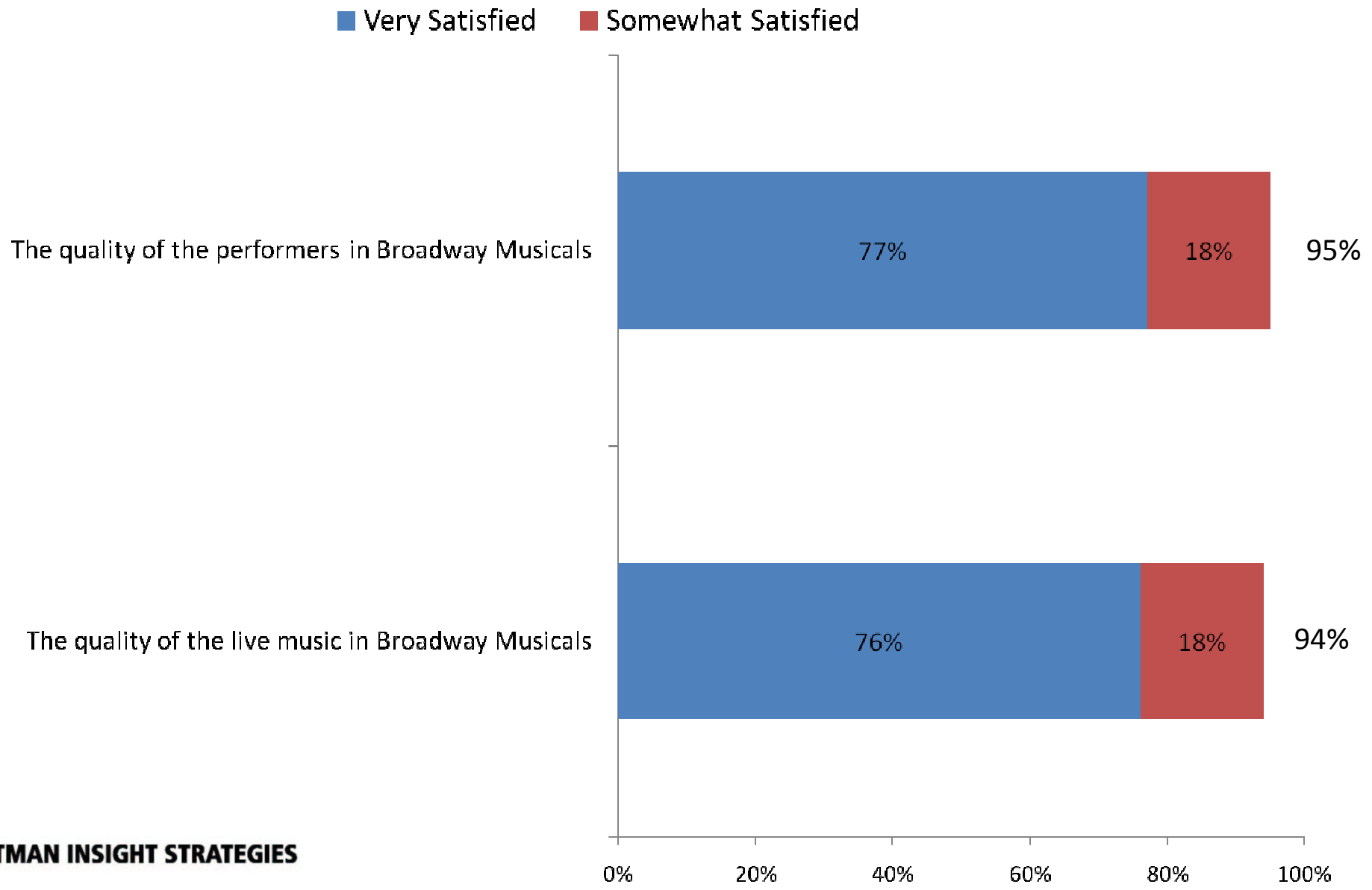
Now thinking specifically about the different components that go into a Broadway Musical which ONE of these statements best summarizes your own opinion?

Live music is an essential part of any Broadway musical

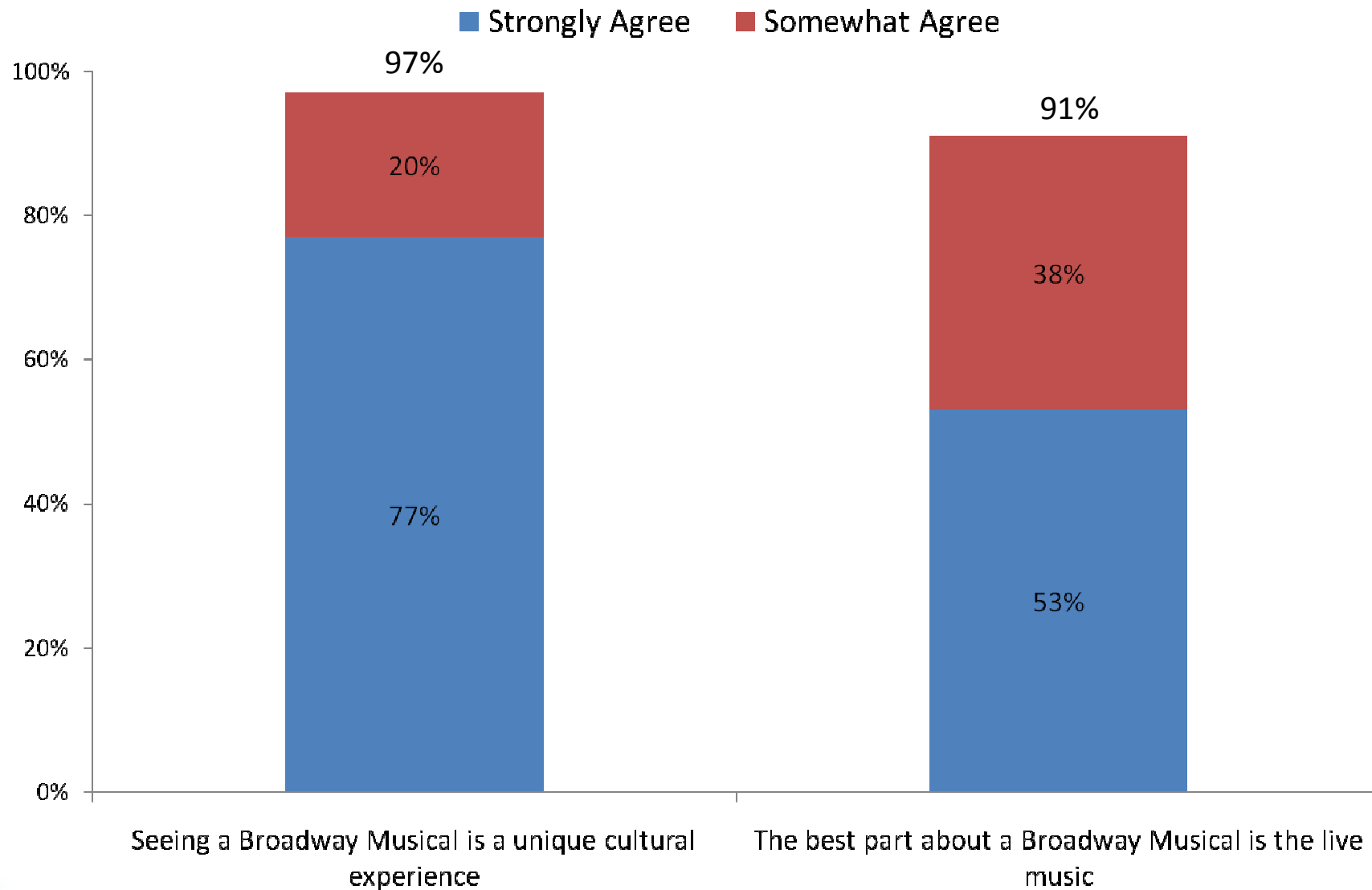
It doesn't matter to me if the music played during a Broadway musical is live, a combination of some live music with pre-recorded music, or just pre-recorded sound played over the speakers



Nearly everyone is satisfied with quality of the performers and live music

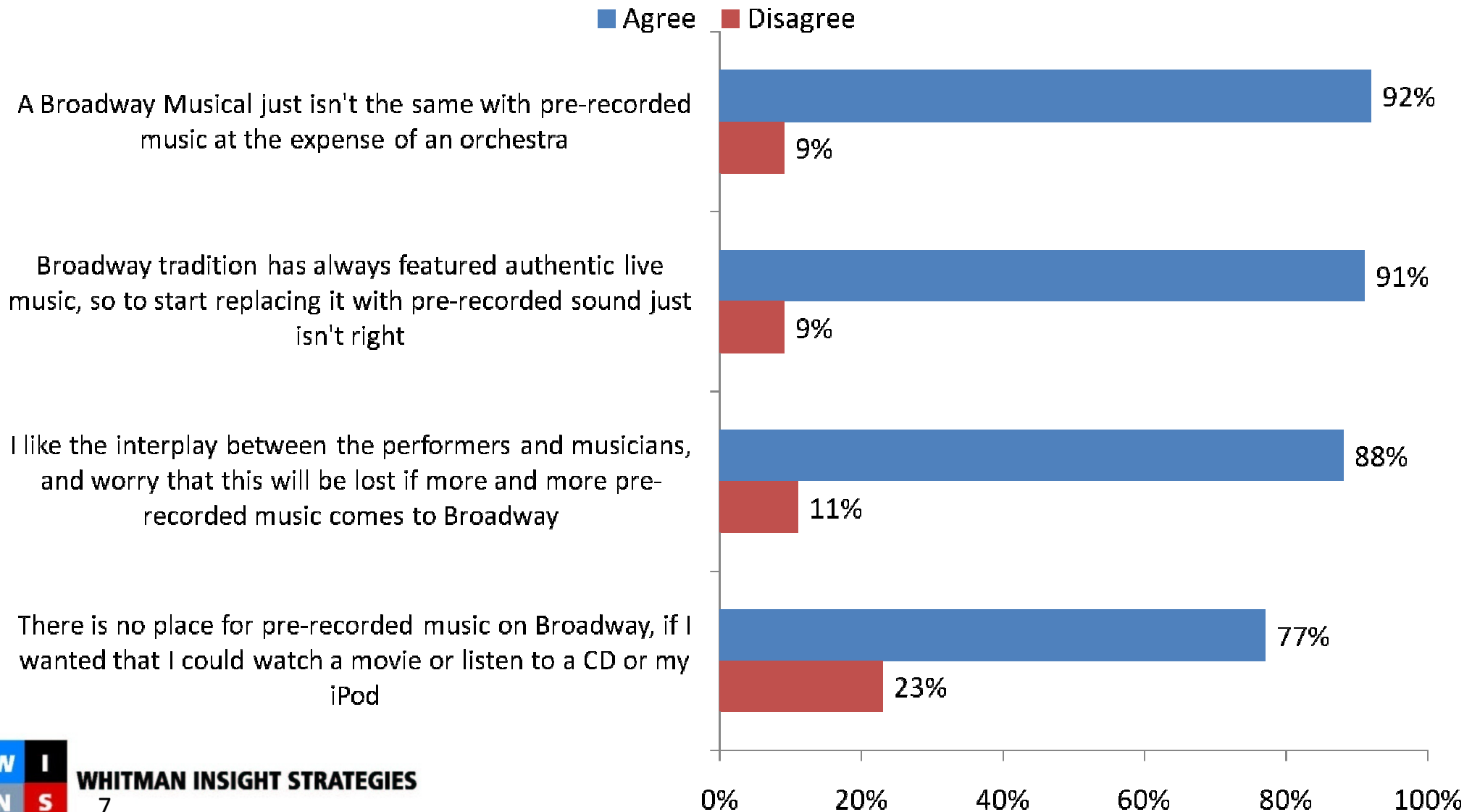


They think Broadway is unique, and the *best part* is the live music



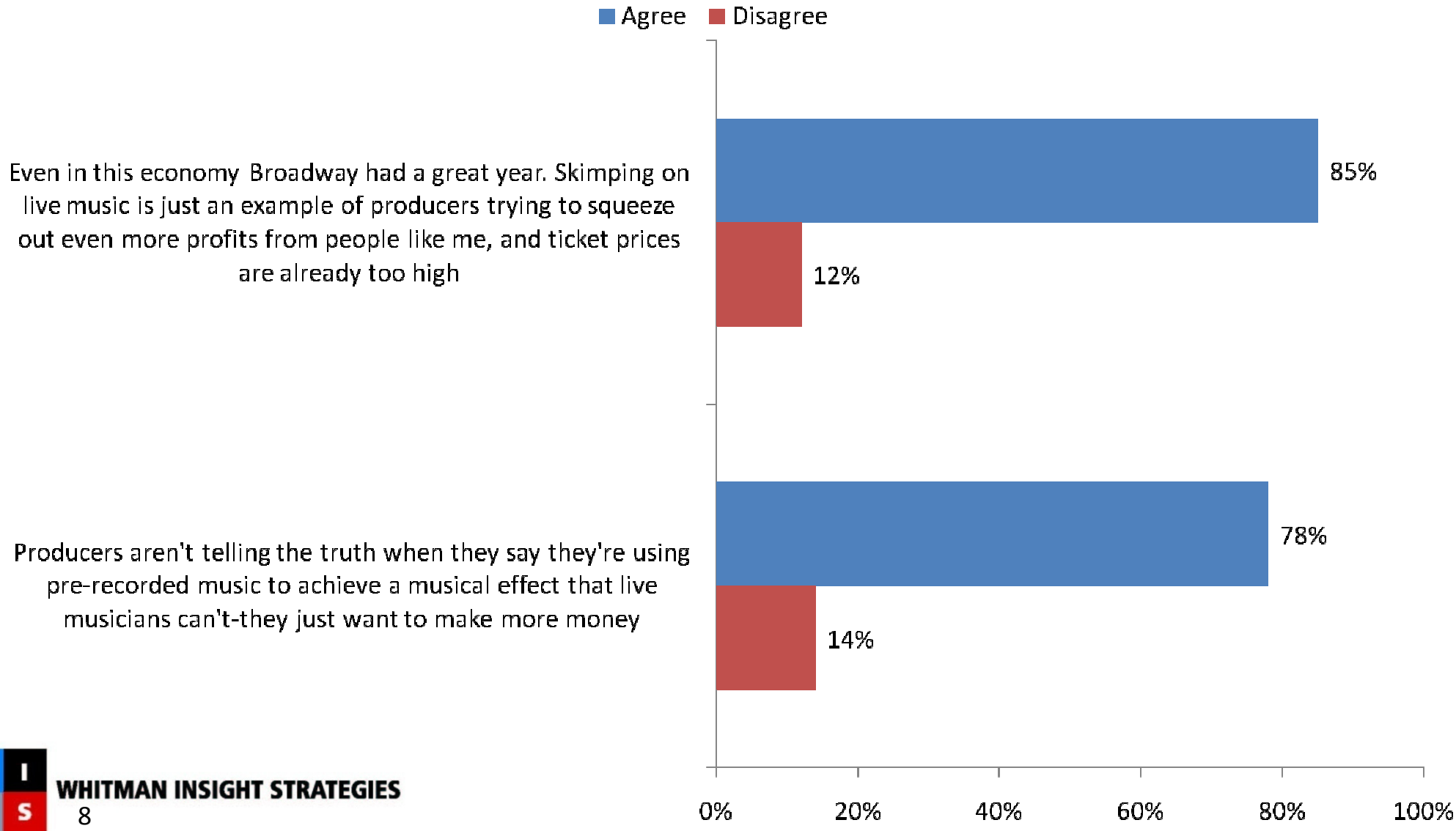
Tradition

(% Strongly + Somewhat Agree/Disagree)



Producers' Greed & High Ticket Prices

(% Strongly + Somewhat Agree/Disagree)

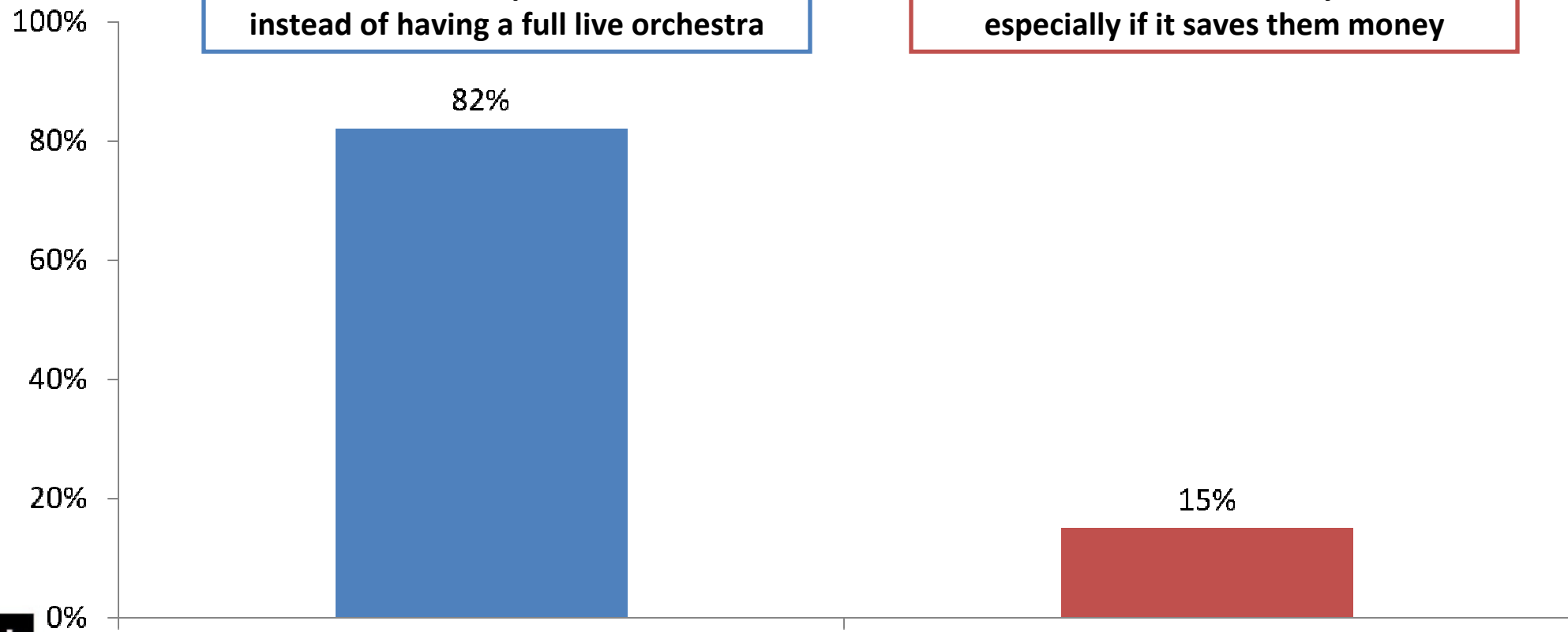


More than 8 in 10 believe that substituting pre-recorded music is dishonest

Here are two statements, which of these do you agree with more...

Some people say that Broadway Musicals are called *musicals* because live music is an important part of the performance. It is dishonest for producers to charge high ticket prices and then substitute pre-recorded music instead of having a full live orchestra

With advances in technology many theatergoers can't notice the difference between pre-recorded music and live music during Broadway Musicals. Producers should be able to use pre-recorded music when they want to, especially if it saves them money

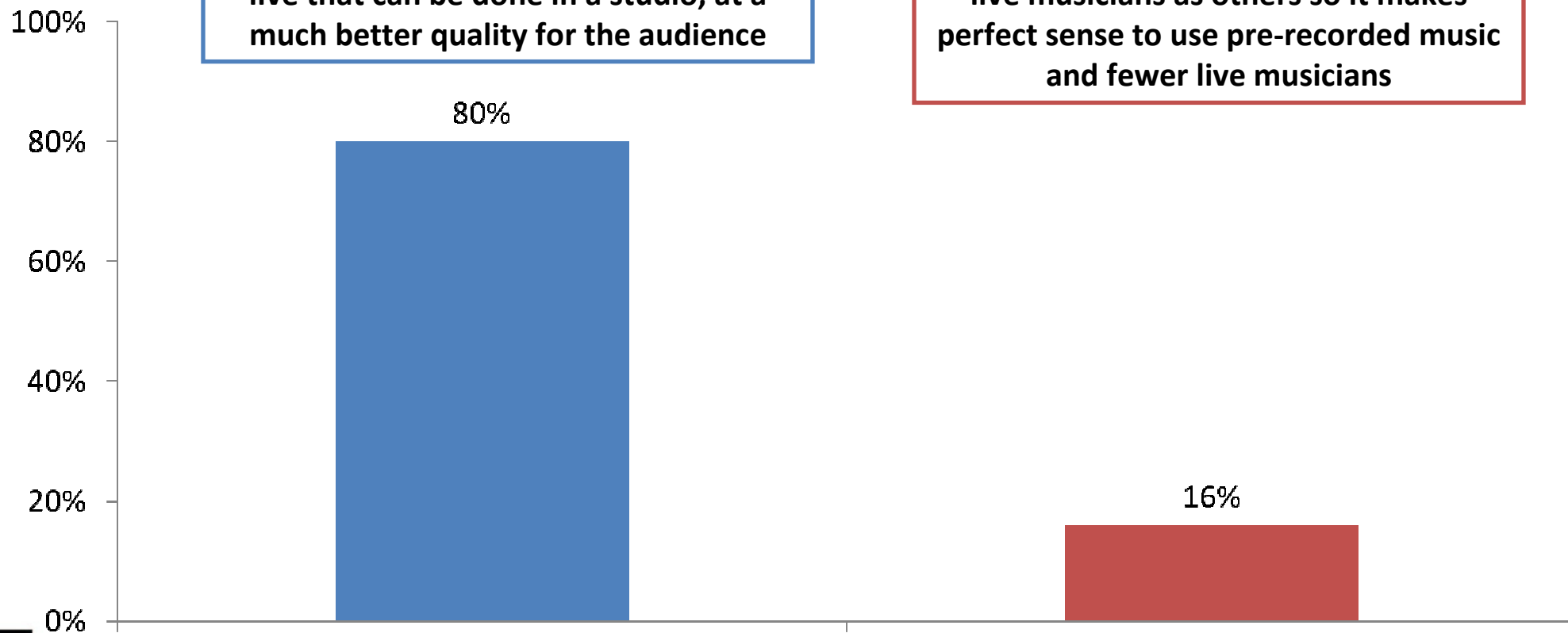


8 in 10 side with music experts and musicians over producers

Here are two statements, which of these do you agree with more...

Music experts say that musicals with pre-recorded music don't sound as good as ones with live musicians and that professional musicians can do anything live that can be done in a studio, at a much better quality for the audience

Producers say that some musicals can only be performed properly by pre-recording sounds in a studio, and these types of musicals don't require as many live musicians as others so it makes perfect sense to use pre-recorded music and fewer live musicians



DK/Refused: 4%

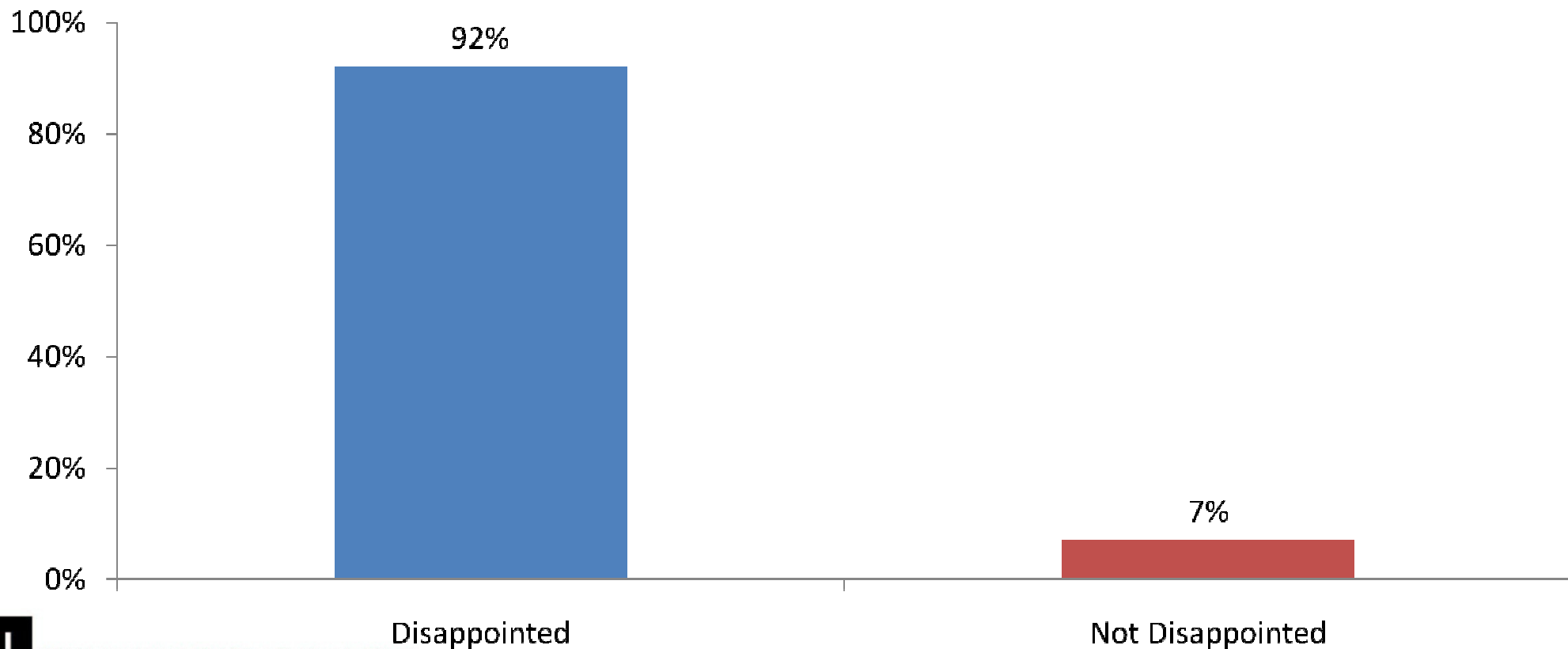


WHITMAN INSIGHT STRATEGIES

10

9 in 10 would be disappointed

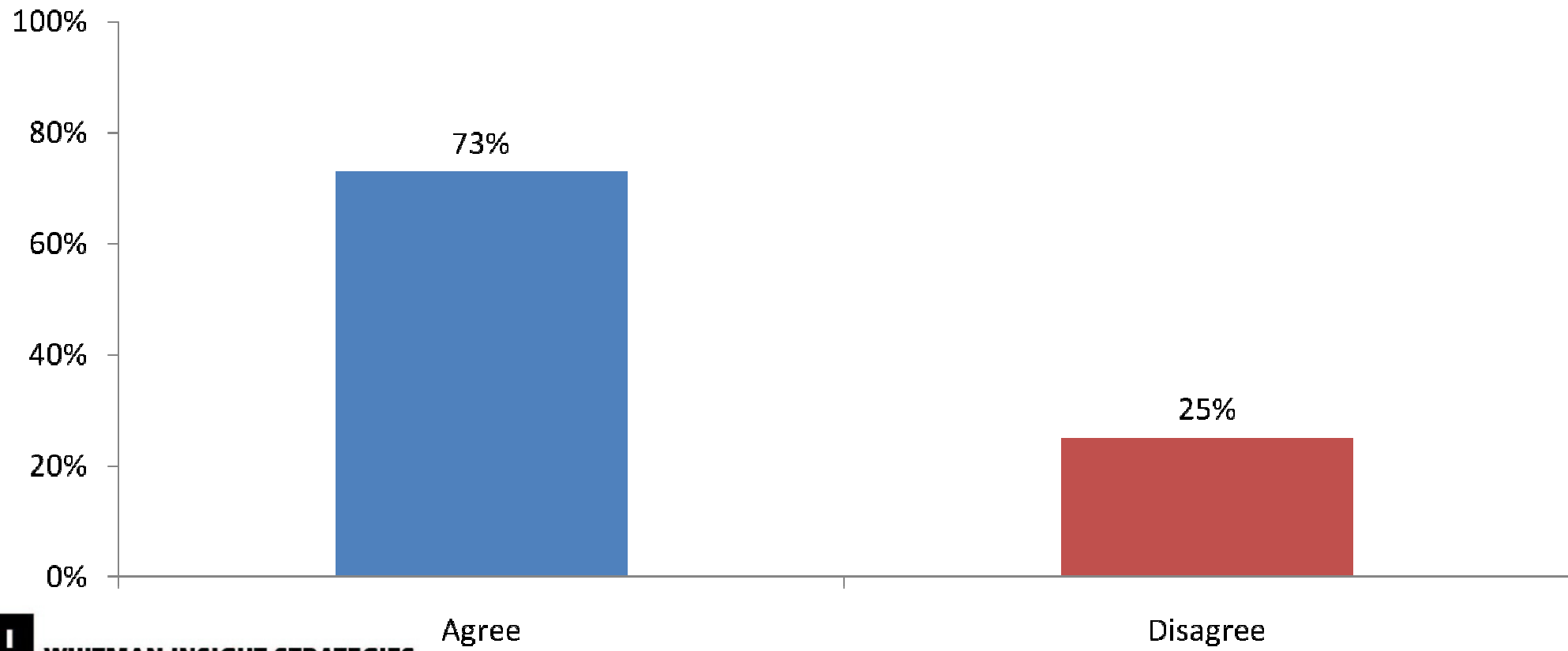
If you found out that you bought tickets to see a Broadway Musical 6 months from now that has little or no live music would you be...



3 in 4 wouldn't buy tickets

If I found out that the Broadway musical I was thinking about seeing was using pre-recorded music instead of all live music I wouldn't buy tickets

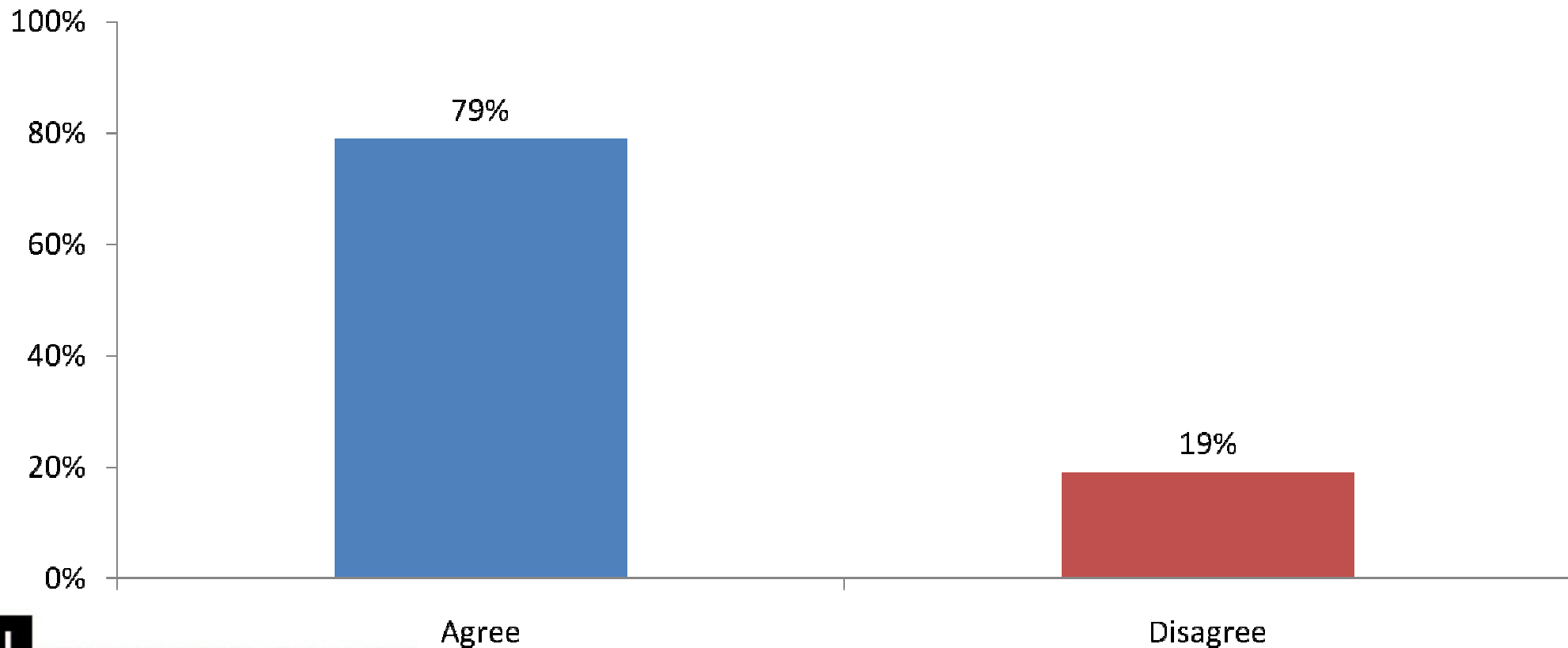
(% Strongly + Somewhat Agree/Disagree)



4 in 5 would be angry

It makes me angry that they would try to trick me by replacing live music with pre-recorded sound

(% Strongly + Somewhat Agree/Disagree)



Select Verbatim Responses

- “I would feel cheated. Music is by far the best [part] of the musical.”
- “It’s breaking a long tradition that should be kept going. I don’t think you can call it a musical without live music.”
- “It disappoints me because it’s the beginning of the loss of arts, talents and role modeling for younger students.”
- “It makes you feel a little bit cheated; I don't go to NY very often and took my daughter so she could have the experience and I would feel cheated if the show weren’t the same.”

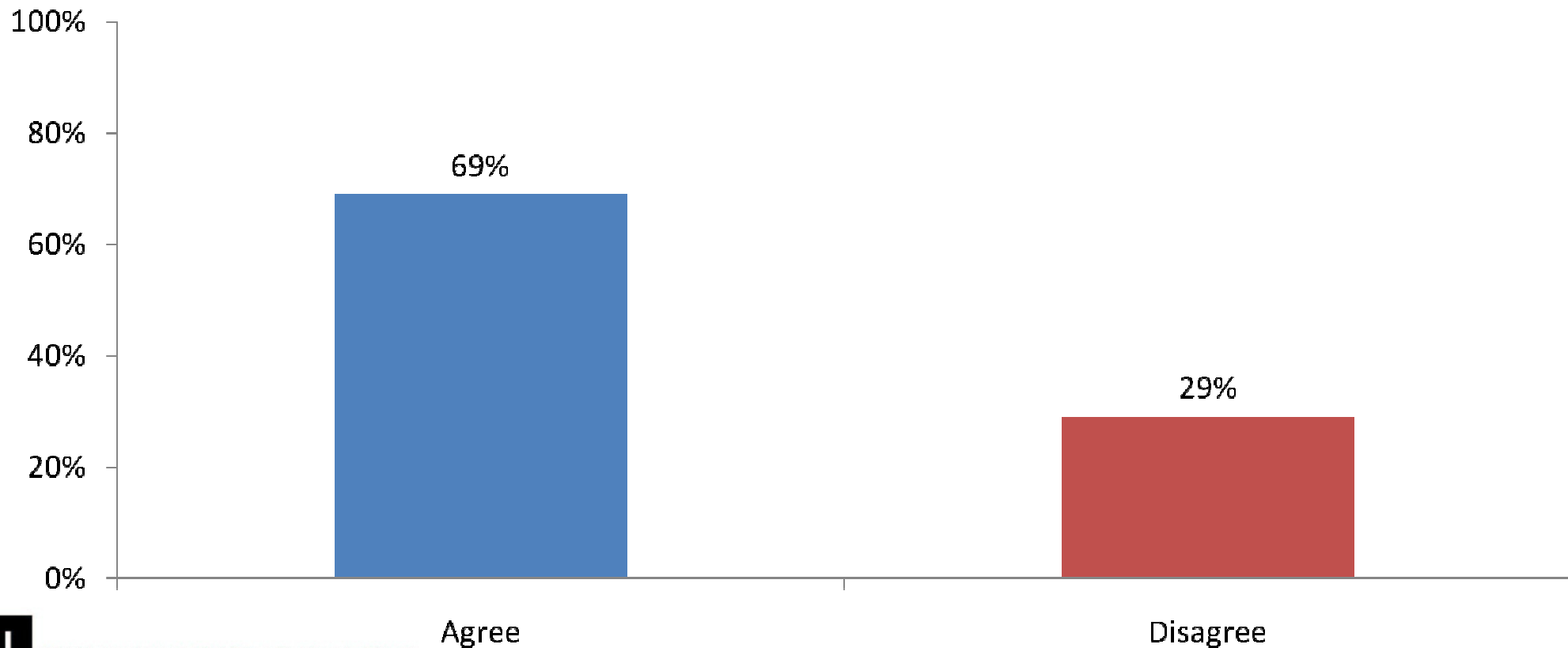
Select Verbatim Responses

- “I feel it is an art that would be lost if they are replaced by pre-recorded music. They study hard and it is not fair. Performers responds to live music. If it is canned music, there would be no inspiration.”
- “I wouldn't want to go.”
- “I feel that it is a violation of the contract of seeing a live performance.”
- “It would make me feel that replacing live musicians with prerecorded music is a second class production and it is not true to form”

7 in 10 would ask if the show has any pre-recorded music before buying tickets

The next time I'm thinking about seeing a Broadway Musical I'm going to ask if it has ANY pre-recorded music before I buy tickets

(% Strongly + Somewhat Agree/Disagree)



Nearly 4 in 5 say that quality and attendance would go down, and ticket prices will stay the same (high) or go up

If producers were allowed to replace live musicians with pre-recorded music whenever they wanted, do you think that...

Go Up Go Down Stay the Same

