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TO: General Managers, IOD Theatres

FROM: Susan D. Phillips, Interim Director

DATE: January 9, 2012

RE: Institute of Outdoor Drama, 2011 Attendance Numbers and Theatre Report

Thank you for your participation in the 2011 attendance survey. Without your help, we would be unable to track attendance and report the latest trends. As you will see in the following pages, all the information we request from you is important to give a complete reporting picture. In 2011, we had a drop in IOD member theatres due to the transition from a member donation organization to a dues paying membership organization. As you may know, our new director, Michael Hardy will begin at the end of this month. One of our first tasks, after he arrives, is to begin rebuilding our theatre membership and the services we provide.

2011 Attendance Summary

The official 2011 IOD attendance figure for all IOD theatres was 1,427,879; that is a decrease of 19.66% from the 2010 total of \$1,777,323. There are several contributing factors for this decrease. The total IOD member theatres dropped from 99 to 72 and the country experienced wild fires, floods, hurricanes and heat waves which greatly affected our attendance totals. We had 65 of our 72 IOD member theatres to report this year. A summary of year over year change in attendance for all IOD outdoor theatres is provided below. The total number of reporting theatres and total attendance for 2010 and 2011 is shown by group, broken down by IOD categories History plays, Shakespeare festivals and Other, which includes, religious dramas, musical and non-musical productions. Please remember that the following attendance numbers and revenue figures reflect outdoor productions only.

Overall summary by theatre grouping

	2010 Theatres	2010 Attendance	2011 Theatres	2011 Attendance
History	29	355,547	25	311,407
Shakespeare, all	42	1,030,923	27	814,680
<i>“Paid” Shakespeare</i>	25	552,271	16	438,932
<i>“Free” Shakespeare</i>	17	478,652	11	375,748
*Other	13	390,853	13	301,792
All Theatres	84	1,777,323	65	1,427,879

* Includes musicals, non-musicals and religious dramas.

To account for fluctuations in the number of theatres that report in a given year, a summary of year over year change in attendance for locations with the same production as last year is provided below:

Summary for theatres reporting in both 2010 and 2011

	N	2010 Attendance	2011 Attendance	Change from Prior Year	Pct Change from Prior Year	N (%) with attendance up from last year
History	23	330,614	308,878	-21,736	-6.6%	7 (30%)
Shakespeare	22	669,103	644,255	-24,848	-3.7%	8 (36%)
<i>“Paid” Shakespeare</i>	14	427,369	430,385	+3,016	+0.7%	5 (36%)
<i>“Free” Shakespeare</i>	8	241,734	213,870	-27,864	-11.5%	3 (38%)
Other	10	285,673	282,370	-3,303	-1.2%	4 (40%)
All Theatres	55	1,285,390	1,235,503	-49,887	-3.9%	19 (35%)

History production groups were down from last year. Trend was down overall for Shakespeare productions, with drops in free productions while paid productions remained stable. Other productions (including religious dramas, musicals and non-musicals) were flat compared to last year’s attendance.

Trend Scores (with 1983-2011 historical average as a score of 100)

- History: This year: 56 Last year: 63
- Shakespeare: This year: 99 Last year: 101
 - Paying productions: 101
 - Free productions: 91

Year over year trends for paid attendance from 2010 to 2011 were largely similar to the trends for overall attendance. The overall and year over year totals are provided below.

Paid attendance summary by theatre grouping

	2010 Theatres	2010 Attendance	2011 Theatres	2011 Attendance
History	28	307,318	25	268,473
Shakespeare	24	475,237	16	491,990
Other	9	215,205	9	129,437
All Theatres	61	997,760	50	889,900

Paid attendance for theatres reporting in both 2010 and 2011

	N	2010 Attendance	2011 Attendance	Change from Prior Year	Pct Change from Prior Year	N (%) with attendance up from last year
History	23	292,692	266,397	-26,295	-9.0%	7 (30%)
Shakespeare	13	364,670	369,247	+4,577	+1.3%	7 (54%)
Other	6	115,871	112,261	-3,610	-3.1%	2 (33%)
All Theatres	42	773,233	747,905	-25,328	-3.3%	16 (38%)

Note: Approximately 40% of religious and Shakespeare plays are free.

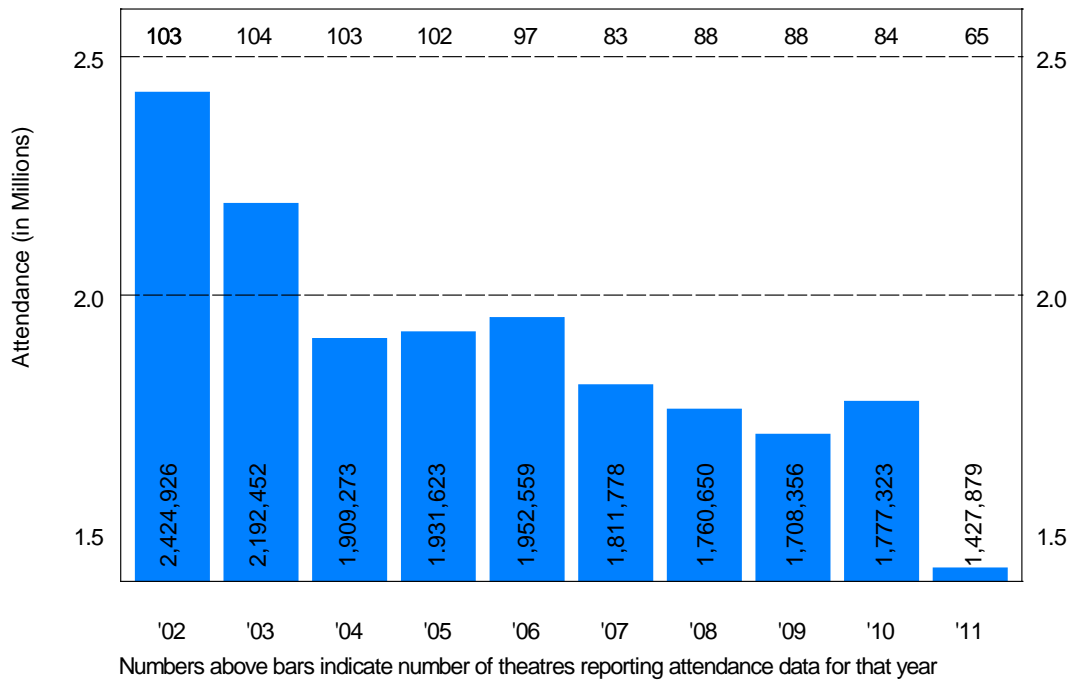
Ticket Income for theatres reporting revenue information in both 2010 and 2011

	N	2010: Attendance, Ticket Income	2011: Attendance, Ticket Income	Change from Prior Year	% Change from Prior Year	N (%) with attendance, revenue up from last year
History	16	220,818	199,123	-21,695	-9.8%	5 (31%)
		\$3,667,030	\$3,334,347	-\$332,683	-9.1%	4 (25%)
Shakespeare	12	357,286	361,415	+4,129	+1.2%	6 (50%)
		\$13,615,027	\$14,121,727	+\$506,700	+3.7%	7 (58%)
All Theatres*	33	619,480	600,128	-19,352	-3.1%	13 (39%)
		\$17,818,932	\$18,017,321	+\$198,389	+1.1%	13 (39%)

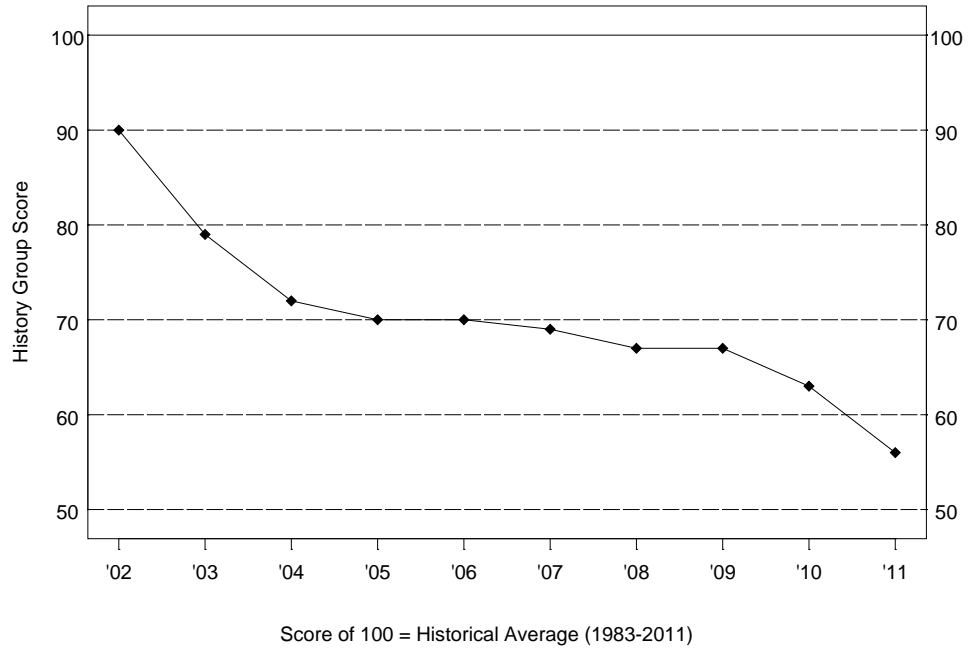
* - All theatres total also include three musical/non-musicals and two religious dramas.
 Note: Not all theatres that reported attendance provided ticket revenue information, therefore we only compared that subset of theatres which provided both attendance and ticket revenue.

Note: Total revenue for all theatres driven by the larger Shakespeare festivals.

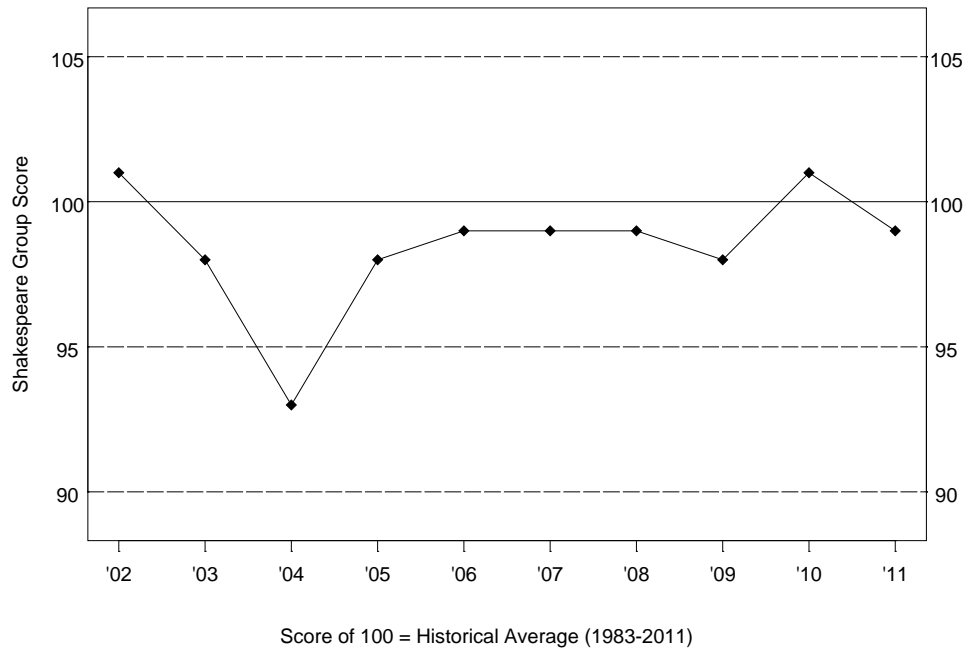
Outdoor Drama Attendance 2002-2011



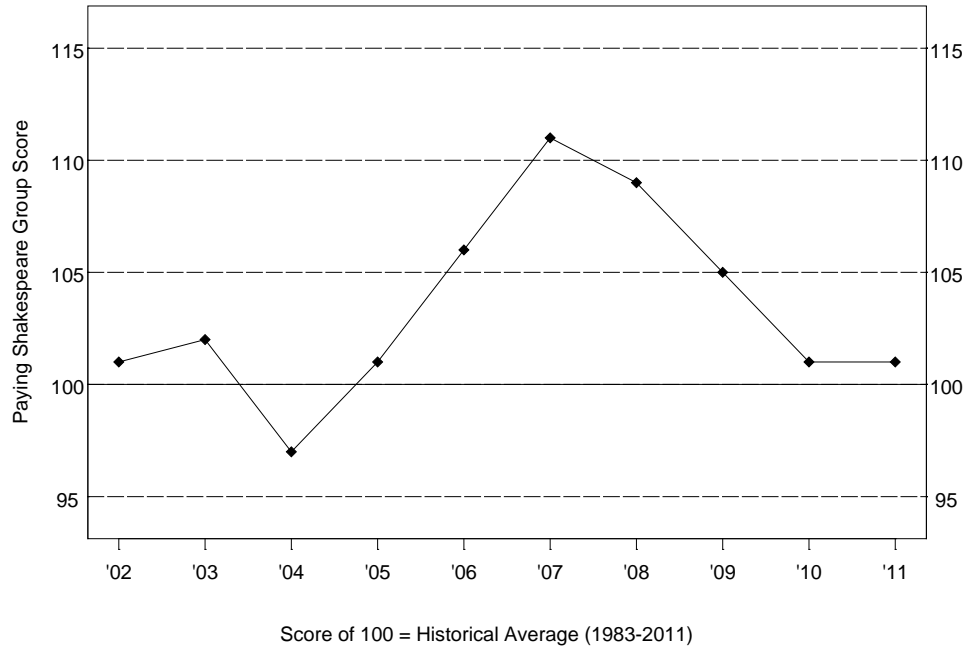
Attendance Trend, History Plays 2002 - 2011



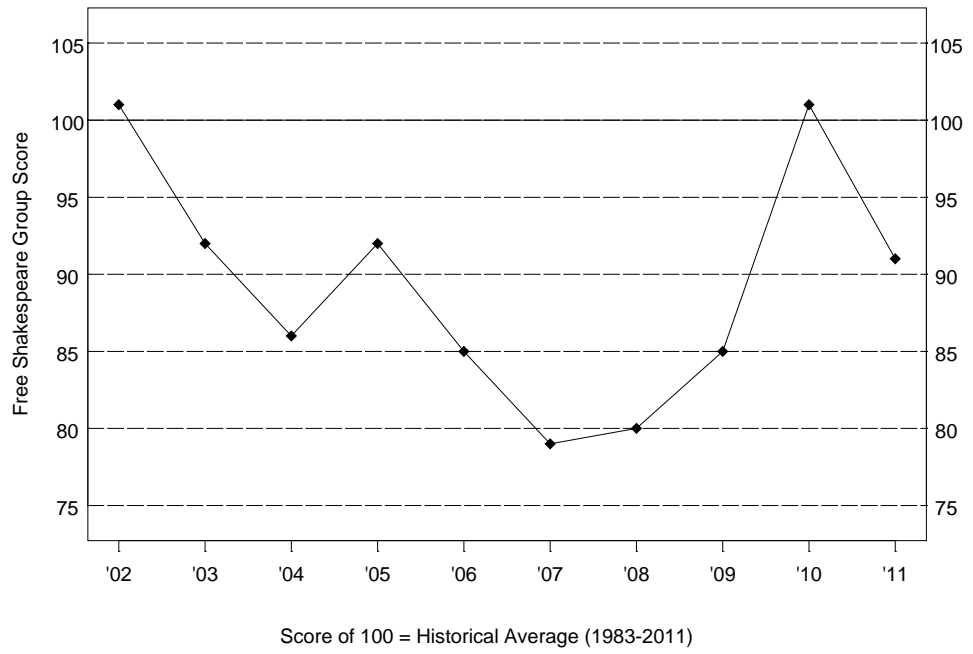
Attendance Trend, Shakespeare Plays/Festivals: 2002 - 2011



Attendance Trend, Paying Shakespeare Plays/Festivals: 2002 - 2011



Attendance Trend, Free Shakespeare Plays/Festivals: 2002 - 2011



Summary of Marketing and Budgets for Outdoor Dramas

A summary of marketing expenditure (percentage of total outdoor budget) for segments of the outdoor dramas is provided below. Summaries provided an account for theatres reporting income and budget along with attendance.

Marketing as a Percentage of Outdoor Budgets

Theatre Segment	#	Mean Total Outdoor Budget	Mean Outdoor Marketing Budget	% Outdoor Budget for Marketing
Small History and Other Theatres (< \$100k)	6	\$39,023	\$3,398	9%
Mid-size History and Other Theatres (\$100k - \$500k)	12	\$234,003	\$30,844	13%
Large History and Other Theatres (> \$500k)	6	\$1,987,800	\$86,576	4%
Small Shakespeare Productions (< \$250k)	9	\$150,208	\$13,683	9%
Mid-size Shakespeare Productions (\$250k - \$2M)	8	\$498,686	\$23,765	5%
Large Shakespeare Productions (> \$2M)	5	\$4,160,212	\$286,095	7%

Note: Other (Musicals, Non-Musicals and Religious Dramas) were added to the History segment.

Mean Income From Ticket Sales by Segment

Theatre Segment	Paying Attendee Average	Ticket Income Average	Use Online Sales	% OL tix*
Small History and Other Theatres (< \$100k)	1,920	\$14,691	1 of 6	30%
Mid-size History and Other Theatres (\$100k - \$500k)	6,811	\$90,310	7 of 12	22%
Large History and Other Theatres (> \$500k)	27,471	\$542,965	6 of 6	27%
Small Shakespeare Productions (< \$250k)	3,028	\$51,555	6 of 6	25%
Mid-size Shakespeare Productions (\$250k - \$2M)	14,283	\$415,689	2 of 2	62%
Large Shakespeare Productions (> \$2M)	63,911	\$2,614,375	5 of 5	36%

* - Percentage of online ticket sales for theatres who have online sales capability

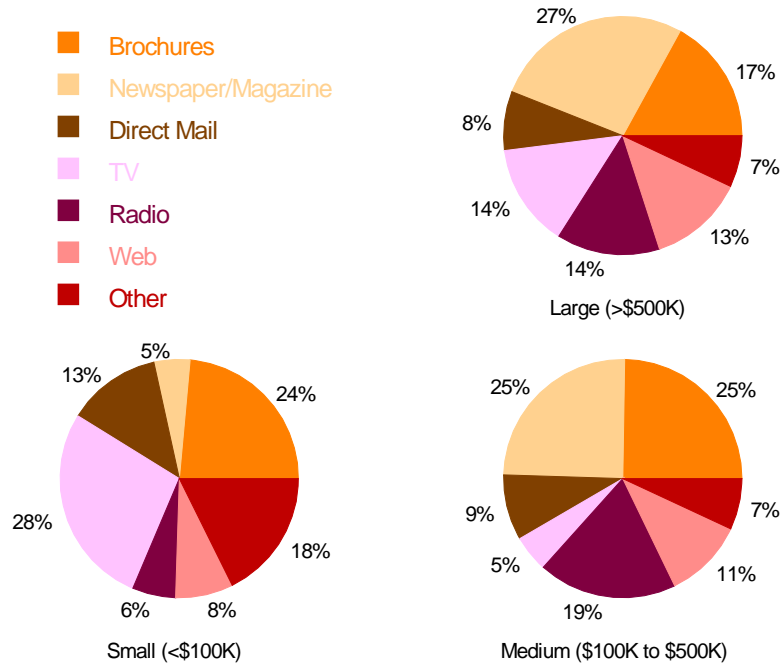
Note: Ticket income figures do not include Free Shakespeare Festivals.

Distribution of Marketing Budget Expenditures by Segment

Theatre Segment	N	Brochures	Direct Mail	News. or Mags	Radio	TV	Web	Other
Small History and Other Theatres (< \$100k)	6	24%	13%	5%	6%	28%	8%	18%
Mid-size History and Other Theatres (\$100k - \$500k)	12	25%	9%	25%	19%	5%	11%	7%
Large History and Other Theatres (> \$500k)	6	17%	8%	27%	14%	14%	13%	7%
Small Shakespeare Productions (< \$250k)	9	19%	15%	39%	7%	1%	11%	8%
Mid-size Shakespeare Productions (\$250k - \$2M)	8	22%	25%	17%	14%	3%	13%	7%
Large Shakespeare Productions (> \$2M)	5	14%	13%	21%	9%	14%	9%	20%

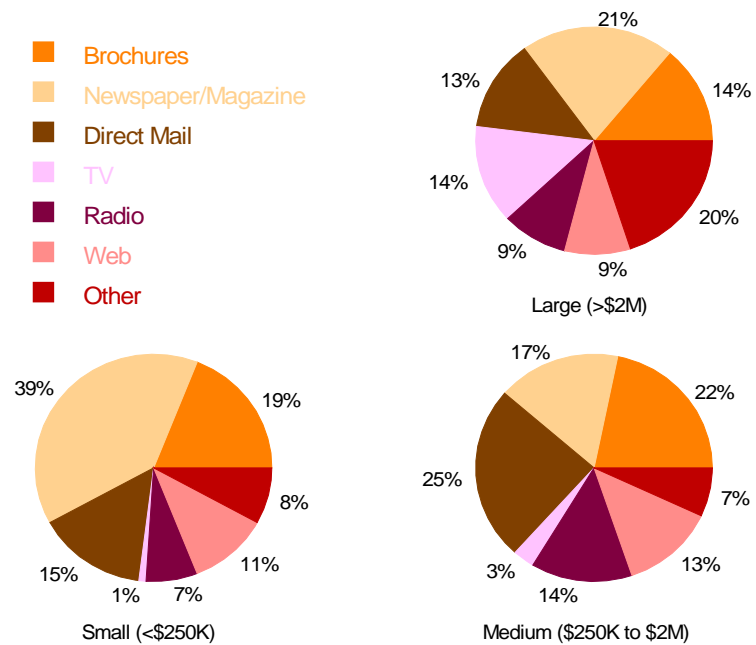
Outdoor Marketing Budget Expenditure, History and Other Theatres

Outdoor Marketing Budget Allocation, History and Other Theatres



Outdoor Marketing Budget Expenditure, Shakespeare Productions

Outdoor Marketing Allocation, Paid Shakespeare Productions

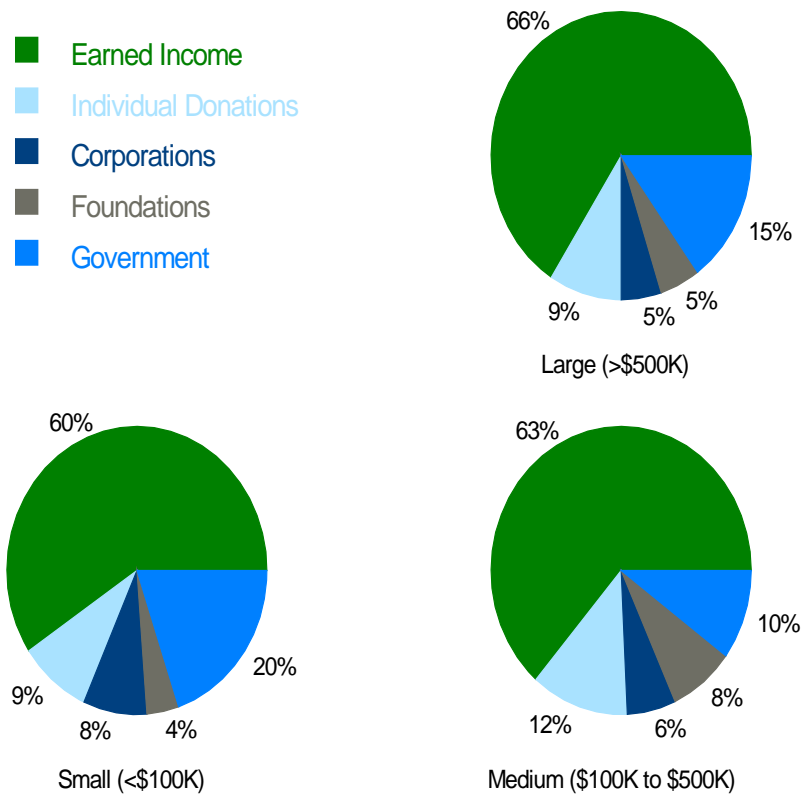


Distribution of Theatre Income by Segment

Theatre Segment	N	Earned	Gov't	Foundations	Indiv. Donation	Corp.
Small History and Other Theatres (< \$100k)	4	60%	20%	4%	9%	8%
Mid-size History and Other Theatres (\$100k - \$500k)	12	63%	10%	8%	12%	6%
Large History and Other Theatres (> \$500k)	6	66%	15%	5%	9%	5%
Small Shakespeare Productions (< \$250k)	9	46%	7%	12%	30%	5%
Mid-size Shakespeare Productions (\$250k - \$2M)	8	29%	10%	21%	29%	12%
Large Shakespeare Productions (> \$2M)	5	70%	3%	5%	19%	3%

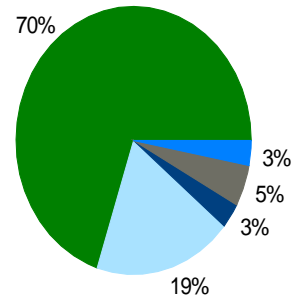
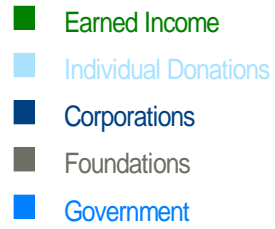
Outdoor Budget Income, History Theatres

Outdoor Budget Income, History and Other Theatres

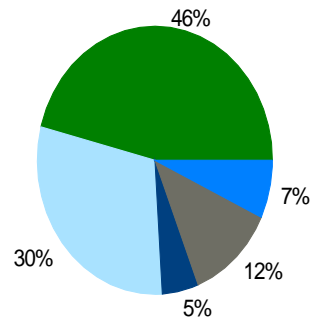


Outdoor Marketing Budget, Shakespeare Productions

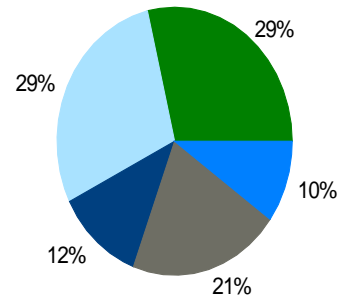
Outdoor Budget Income Allocation, Paid Shakespeare Productions



Large (>\$2M)



Small (<\$250K)



Medium (\$250K to \$2M)