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Analysis of Future Economic Opportunities for Branson, Missouri

Harrison Price Company

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ANALYSIS OF FUTURE ECONOMIC OPPORTUNITIES
FOR BRANSON, MISSOURI

October 2001

Prepared for
BREDA ENTERTAINMENT PRODUCT
ADVISORY COUNCIL

Prepared by
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Section 1

INTRODUCTION

The Branson/Lakes area, and the City of Branson in particular, experienced rapid growth in the early 1990s, driven largely by creation of music shows in an increasing number of new theaters. The growth of music shows slowed in the latter part of the decade and some theaters are now dark. Recognizing the change, the Board of Directors of the Branson Regional Economic Development Association (BREDA), which represents the diverse business and civic interests of the area, established an Entertainment Product Advisory Council (EPAC) consisting of representatives of business, entertainment and government to review the current situation and make recommendations for the future. To that end, EPAC retained Harrison Price Company (HPC) to perform a market and economic study of the area and provide suggestions as to appropriate actions to be taken in the future to assure long-term health of the local economy. Council members made it clear at the outset that the term "entertainment product" in the Council's name was to be interpreted as encompassing all forms of entertainment, not just the theater industry.

Members of the Council and countless others from all elements of the business community volunteered their time and opinions in interviews with HPC personnel. Those interviews revealed great diversity in terms of perception of the current situation and ideas for future improvement. HPC used those suggestions as guidelines, some of which defined the boundaries of reality, in our quantitative and qualitative analysis. The underlying purpose of the study was to establish a solid statistical basis for decision making and evaluate ways of reaching reasonable growth goals.

In addition to the interviews, HPC's assignment included the following:

- Inventory the existing visitor attraction and accommodations infrastructure of the area.
- Identify competing tourist destinations in the region and collect data on recent performance of selected areas considered to be most competitive with Branson.
- Analyze data on tourism to Branson, including transportation, party size and composition, age and income characteristics, origins, length of stay, accommodations used, purpose of visit, attractions visited, etc.
- Analyze trends in visitation by tour groups and other segments and project the level of day and overnight visitors for a period of 10 years.
- Based on data defining current origins of visitors by type, analyze the demographics of future populations in those regions over a 20 year period through 2020.
Analyze data on current tourists to Branson as well as statewide and national data on participation rates for various types of vacation and recreation activities based on age, income and type of trip to provide a tool to predict probable future tourism to Branson based on demographics alone.

Evaluate current advertising and promotion expenditures by the Chamber of Commerce/Convention and Visitors Bureau and, if possible, the private sector in Branson. Compare budgets with other destination resorts.

Analyze the music show business in Branson over the decade of the nineties focusing on attendance, pricing, variety, length of season, etc. to attempt to determine the cause of recent flattening or reduction in ticket sales.

Based on the above analysis, recommend ways to improve performance of the music show business in Branson.

Review data in our files and search industry sources for examples of actions taken by other jurisdictions to create new economic growth, with a focus on recreation attractions and tourism growth. Based on that analysis, identify potential additions to the tourism economic and political infrastructure that could generate new tourism in the long run.

Recommend future actions that could be taken by the City and/or the Chamber of Commerce, CVB or the private sector to increase tourism to Branson. Identify the structure of any public/private partnerships that should be created to implement the recommendations.

Estimate increases in tourism that could be expected from the recommended actions. Add those results to the projected tourism base to define a range of future tourism through 2020.

The above analysis is summarized in this report. Following this introduction, Section 2 contains an executive summary of the findings. Section 3 covers past growth of tourism in the Branson area, and is followed by projections of regional population by age group in Section 4. Branson is compared to other competitive resorts in Section 5. Marketing efforts and budgets available to the Branson Chamber of Commerce are explored in Section 6, which includes analysis of potential effects of increased marketing funds resulting from proposed new taxes. Section 7 deals with the indoor music theater industry. In Section 8, HPC’s recommendations for new venues and programs are presented.

We hereby express our thanks to the EPAC members for their help in the course of this study. Russell Hoeflicker, Chairman; Michael Rankin, Executive Director of BREDA; Randall Fiveash, President of the Chamber of Commerce and CVB; and Terry Dody, Branson City Manager. By reference, the associates of those executives are included in our expression of gratitude for their help.
This section of the report contains a brief summary of the major findings of the study. The underlying assumptions and details of the analysis, and the data sources, can be found in the main body of the report.

Tourism – Overnight Visitors to the Branson/Lakes Area

Branson/Lakes area tourism started in the early 1900s based on Ozarks Mountains scenery and culture. The 1960s saw dam/lake building, interstate highway expansion, good times and widespread auto ownership expand the market for tourism to the area. However, the real boom occurred in the early 1990s when the music theater industry grew rapidly to become a national phenomenon. Overnight visitors increased from 2.2 million in 1991 to 4.8 million in 2000, an increase of 119 percent. Most of the increase occurred between 1991 and 1996 (4.5 million overnight visitors), and has been modest since, actually declining slightly between 1999 and 2000.


Regional Resident Population Projections – 2000 to 2020

Data from the 2000 census indicate a population of 79.9 million in states included in the Branson regional market, which includes areas within 500 to 600 miles. Census Bureau projections put the expected 2020 population at 90.3 million, a 13 percent increase. During the 20-year period, 10-year age groups between 25 and 64 will see a smoothing of proportions in each group, accompanied by an increase in those over 65 from 12.0 percent in 2000 to 16.5 percent in 2020.

Branson Compared with Selected Destinations

No two areas are exactly alike, but Branson and Pigeon Forge/Gatlinburg, TN, are most similar. The latter is slightly larger in overnight tourism, but lacks the lakes enjoyed by Branson visitors. Myrtle Beach is also considered to be a direct competitor, and like Pigeon Forge has developed a music theater industry about one-third the size of Branson's. Other competitors include Tunica, MS, Wisconsin Dells, WI, Hot Springs and Eureka Springs, AR. On a national scale, a survey of people who
have not visited Branson indicated many had been to Orlando/Disney World, FL or Las Vegas, NV recently, putting those giants in the competitive loop.

**Branson Lakes Chamber of Commerce and CVB Marketing Resources**

Compared to 16 other destination tourism areas, the current BLACC/CVB operating budget of $6.5 million is about two-thirds of the norm. Funding from tourism taxes are much lower than for other areas, but management has done a good job of generating other revenues from advertising and publication sales. Moreover, devoting 65 percent of funding to direct marketing shows an efficiency of resource use.

A proposed new Tourism Community Enhancement District tax on retail sales could yield an immediate increment of $5.25 million in additional funding for marketing, putting Branson on a more equal footing with some of its most direct competitors. Effective use of those added funds should result in a further increase in overnight visitors estimated at 2.65 million or more, depending on the ultimate cost of reaching each new guest. Overnight tourism would approximate 7.5 million visitors. Expenditures by those added visitors would generate additional taxes and funding for BLACC/CVB that could increase the total budget to $15 million or more annually. Problem solved, but only if the new TCED tax is passed.

**Present Position and Future Outlook for the Indoor Theater Industry**

In 2000, almost 48,000 indoor theater seats were in operation in the Branson area, and 5,300 seats were in theaters that were dark. Over five million tickets were sold for a variety of performances. These are phenomenal numbers for any location, but the industry is overbuilt. Twenty-six percent of current seating was in place prior to 1990. Additions in 1990 to 1992 more than doubled the inventory, and in 1992 and 1993, thirty-four percent of the current seating capacity opened, including many of the largest venues. Unfortunately, capacity grew faster than demand for tickets, and the result has been low utilization of most theaters, with an industry average of 31 percent. Mid-sized theaters with 1,000 to 1,999 seats fared best in terms of utilization at 50 percent occupancy. This group also generated the highest revenue per seat at $3,126 compared to $1,630 for theaters with less than 1,000 seats and $1,884 for venues with 2,000 seats or more. All are below industry averages.

HPC created economic models for operation of theaters with 1,000 and 2,000 seats and occupancies of 20 percent to 50 percent, assuming $5,000 per seat development cost. The models simply indicate that at low utilizations, return on investment is inadequate, but the real implication is that at utilization of less than 40 percent, the industry is over-built. The roughly $100 million in current theater ticket revenues will support only about 31,000 seats at viable economic levels, only 60 percent of the number of existing seats. The solution will either be to convert some of the existing
theaters to other uses, generate new visitors to the area by expanded marketing efforts, and/or re-invent show formats to appeal to families in summer.

Assuming that new marketing budgets are available, and that the present approximate one-to-one ratio of theater tickets sold to overnight visitors continues, an additional 2.4 million ticket sales could bring economic health to the indoor theater industry in Branson. Ticket sales would rise to approximately 7.5 million in the future.

Recommended New Facilities and Uses

Additional funding for promotion of tourism will not be sufficient to grow tourism to Branson unless there are new, quality attractions to sell. And existing attractions must evolve to reach younger age groups – the Baby Boomers, GenXers and Echo Boomers. Throwing more money at marketing the same attractions to the same older demographic would have limited success. Therefore, HPC recommends a number of new attractions aimed at broadening the appeal of Branson and remaking its image.

Aquarium

A private, for-profit aquarium is recommended to appeal to families with younger children as well as older visitors. An aquarium is estimated to cost about $50 million to develop, should draw between 1.0 million and 1.2 million annual visitors and generate $18 million to $24 million in revenues. As many as one-third to one-half of the guests could be new overnight visitors to the area or induced repeat visitors.

Murals Program in downtown Branson and Hollister

A budget of $500,000 or more will be required to create the artwork and fund beautification projects. Costs will be recouped from increased tax revenues.

Waterfront Villages

Branson Landing, announced subsequent to the start of this study, will fill the void of waterfront development on Lake Tanneycomo. Longer term, a waterfront village on Table Rock Lake is a likely project for private enterprise. Consisting of 100,000 to 150,000 square feet of leasable space about equally divided among restaurants, specialty shops and entertainment venues, such a project should generate annual
sales of $30 million to $45 million. Development cost is estimated at $35 million to $52 million. A first-class marina project should accompany this project.

**Amphitheater (not need if downtown arena is built)**

The primary purpose of developing an amphitheater is to provide a venue for performances by top-level talent, particularly shows oriented to younger generations. A facility with 4,000 covered seats and total capacity of 18,000 is suggested. Estimated cost is about $10 million for an efficient design. Twenty to thirty performances per year are all that could be expected unless it is integrated with festival grounds and a strong events calendar as discussed below. The venue should break even after debt service on bond financing.

**Festivals and Events**

HPC recommends that festivals and events be a primary focus of future tourism development efforts. A separate entity should be created and adequately funded, including a permanent staff whose sole purpose is to create and manage a constantly expanding festival and events calendar. Separate festival grounds with a controlled gate and permanent show and visitor service facilities should be developed. This program cannot be defined in more detail until other issues are resolved. However, Summerfest in Milwaukee is an appropriate model, although it is a much larger market. Silver Dollar City management has expressed a willingness to work with the surrounding communities to integrate festival activities and lend their considerable expertise to the effort. Adequate resources must be allocated to this program to insure success.

**Conclusion**

Branson/Lakes area has an opportunity to grow its overnight tourism from approximately five million in recent years to about 7.5 million by 2020. Keys are a greatly expanded marketing program coupled with development of new, quality attractions and a change of image and orientation to a younger market demographic.
Section 2

SUMMARY

This section of the report contains a brief summary of the major findings of the study. The underlying assumptions and details of the analysis, and the data sources, can be found in the main body of the report.

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Branson/Lakes area tourism started in the early 1900s based on Ozarks Mountains scenery and culture. The 1960s saw dam/lake building, interstate highway expansion, good times and widespread auto ownership expand the market for tourism to the area. However, the real boom occurred in the early 1990s when the music theater industry grew rapidly to become a national phenomenon. Overnight visitors increased from 2.2 million in 1991 to 4.8 million in 2000, an increase of 119 percent. Most of the increase occurred between 1991 and 1996 (4.5 million overnight visitors), and has been modest since, actually declining slightly between 1999 and 2000.


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A proposed new Tourism Community Enhancement District tax on retail sales could yield an immediate increment of $5.25 million in additional funding for marketing, putting Branson on a more equal footing with some of its most direct competitors. Effective use of those added funds should result in a further increase in overnight visitors estimated at 2.65 million or more, depending on the ultimate cost of reaching each new guest. Overnight tourism would approximate 7.5 million visitors. Expenditures by those added visitors would generate additional taxes and funding for BLACC/CVB that could increase the total budget to $15 million or more annually. Problem solved, but only if the new TCED tax is passed.

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**Murals Program in downtown Branson and Hollister**

Beautify the downtown areas with a quality historical murals program to draw cultural tourism is a suggested goal. Although this is a non-gated attraction, a successful murals program should generate about 500,000 new visitors, including 300,000 overnight tourists. A budget of $500,000 or more will be required to create the art work and fund beautification projects. Costs will be recouped from increased tax revenues.

**Waterfront Villages**

Branson Landing, announced subsequent to the start of this study, will fill the void of waterfront development on Lake Tanneycomo. Longer term, a waterfront village on Table Rock Lake is a likely project for private enterprise. Consisting of 100,000 to 150,000 square feet of leasable space about equally divided among restaurants, specialty shops and entertainment venues, such a project should generate annual sales of $30 million to $45 million. Development cost is estimated at $35 million to $52 million. A first-class marina project should accompany this project.
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HPC recommends that festivals and events be a primary focus of future tourism development efforts. A separate entity should be created and adequately funded, including a permanent staff whose sole purpose is to create and manage a constantly expanding festival and events calendar. Separate festival grounds with a controlled gate and permanent show and visitor service facilities should be developed. This program cannot be defined in more detail until other issues are resolved. However, Summerfest in Milwaukee is an appropriate model, although it serves a much larger market. Silver Dollar City management has expressed a willingness to work with the surrounding communities to integrate festival activities and lend their considerable expertise to the effort. Adequate resources must be allocated to this program to insure success.

Conclusion

Branson/Lakes area has an opportunity to grow its overnight tourism from approximately five million in recent years to at least 7.5 million by 2020. Keys are a greatly expanded marketing program coupled with development of new, quality attractions and a change of image and orientation to a younger market demographic.
Section 3

PAST GROWTH IN BRANSON/LAKES AREA TOURISM
AND DEMOGRAPHIC AND TRIP CHARACTERISTICS OF VISITORS

Branson has had a sporadic history of tourism growth but has evolved over many decades to become one of the premier destination resorts in the Midwest. It has evolved into a mature resort offering a wide variety of natural and man-made attractions appealing to a broad range of ages and interests. This section of the report provides a background for subsequent analysis of opportunities for future development in Branson.

General History of Branson Development

Branson's history as a recreation destination started as a riverside fishing and swimming resort in the scenic Ozarks Mountains, bolstered by the best selling book "The Shepherd of the Hills" in 1907, which created nationwide interest in the area. The area had modest success until the early 1960s, when a dam created Table Rock Lake, music shows began to sprout up, Shepherd of the Hills Old Mill Theater opened and Silver Dollar City opened as a small themed attraction atop Marvel Cave. At the same time, the Interstate Highway network was being completed and a booming economy caused private auto ownership to explode, allowing families to broaden their destination choices. The stage was set for continued expansion of Branson as a destination resort of increasing diversity, which took a decided turn toward emphasis on indoor music theater entertainment in the 1980s and 1990s. Thus, in addition to the traditional resort amenities, Branson once again received national attention, this time for the concentration of theaters and seating in its indoor venues (discussed elsewhere in more detail).

Estimated Annual Visitors to Branson/Lakes Area

Branson/Lakes Area Chamber of Commerce & CVB (BLACC/CVB) estimates the number of visitors to the area as shown in Table 3-1 for the period 1991 through 2000. Overnight visitors increased from 2.2 million in 1991 to 4.8 million in 2000, a gain of 119 percent. However, most of that growth occurred between 1991 and 1995 (89 percent) and then only 16 percent from 1995 to 2000. Day visitors had a slightly more modest growth in the early 1990s and actually declined since 1995.

HPC prepared separate calculations of overnight visitors based on hotel room counts and actual Tourism Tax receipts that yielded an estimate of overnight visitors of 4,375,000 in 2000. This is 10 percent lower than the BLACC/CVB estimate. That amount is insignificant in terms of the purpose of this analysis, which is focused on predicting the future of area tourism, be it up or down. The existing base is almost
Table 3-1

ESTIMATED ANNUAL VISITORS TO BRANSON/LAKES AREA
1991 TO 2000

<table>
<thead>
<tr>
<th>Year</th>
<th>Overnight Visitors (000)</th>
<th>Day Visitors (000)</th>
<th>Total Visitors (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>2,202</td>
<td>1,048</td>
<td>3,250</td>
</tr>
<tr>
<td>1992</td>
<td>2,905</td>
<td>1,381</td>
<td>4,286</td>
</tr>
<tr>
<td>1993</td>
<td>3,689</td>
<td>1,754</td>
<td>5,443</td>
</tr>
<tr>
<td>1994</td>
<td>3,858</td>
<td>1,955</td>
<td>5,813</td>
</tr>
<tr>
<td>1995</td>
<td>4,161</td>
<td>2,132</td>
<td>6,293</td>
</tr>
<tr>
<td>1996</td>
<td>4,469</td>
<td>2,059</td>
<td>6,528</td>
</tr>
<tr>
<td>1997</td>
<td>4,600</td>
<td>2,096</td>
<td>6,696</td>
</tr>
<tr>
<td>1998</td>
<td>4,879</td>
<td>1,950</td>
<td>6,829</td>
</tr>
<tr>
<td>1999</td>
<td>4,949</td>
<td>2,051</td>
<td>7,000</td>
</tr>
<tr>
<td>2000</td>
<td>4,815</td>
<td>2,045</td>
<td>6,860</td>
</tr>
</tbody>
</table>

Increase: 1991 to 2000 119% 95% 111%

1991 to 1995 89% 103% 94%
1995 to 2000 16% -4% 9%

Source: Branson/Lakes Chamber of Commerce & CVB
irrelevant in that context, at least in view of such a small discrepancy. Moreover, the focus of our study is on the overnight visitor drawn from beyond the local resident market area. Overnight visitors are the true tourist market and have a much higher daily spending rate than the day visitor. Thus, the emphasis in the remainder of this report is on overnight visitors.

Demographic and Trip Characteristics of Overnight Visitors

Data in Table 3-2 define the characteristics of visitors and trips to the Branson area in 2000. Data of note are:

- Only 22.9 percent were first time visitors, down from 26.6 percent a year earlier.
- Summer months show the highest total visitor percentage, but include a three-month period June to August. In reality, visits are relatively constant from May through mid-December.
- Shopping and theaters are listed as the primary activity of visitors, both with over 85 percent participation. Historic sites and theme parks follow at 58.4 percent and 48.5 percent, respectively (see cautions about sampling biases, below and elsewhere in this report).
- Visitors report seeing (or planning to see) 3.93 shows in 2000, a number that is impossible to achieve. That level would yield annual ticket sales of about 17 million to overnight visitors alone, whereas actual show tickets sold in 2000 were about 5 million based on Tourism Tax revenues.
- Average length of stay is listed at 4.0 nights, but Tourism Tax data indicated a stay of around half that number.
- 71.3 percent stay in commercial hotels and motels. Timeshares are a growing factor at 7.9 percent.
- On a full year basis, visitors are almost equally divided among families, adults and seniors. However, family members comprise about half of the visitors in summer months.
- 83.3 percent drove their own cars to Branson and 7.2 percent came on bus tours. Only 3.0 percent came by air.
- In marked contrast to activities actually participated in, visitors stated motivation to visit Branson was general vacation and Branson itself (combined 53.7 percent). Entertainment/shows motivated 46.5 percent.
- Spending is listed at $806.30 per trip. That equates to $278.46 per person, or $69.62 per person per day.
### Table 3-2
**BRANSON VISITOR PROFILE, 2000**

<table>
<thead>
<tr>
<th>Visitor Profile</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Characteristics</strong></td>
<td><strong>Visitor Composition</strong></td>
</tr>
<tr>
<td><strong>Last Visit</strong></td>
<td><strong>%</strong></td>
</tr>
<tr>
<td>First Visit</td>
<td>22.9%</td>
</tr>
<tr>
<td>Earlier 2000</td>
<td>22.2%</td>
</tr>
<tr>
<td>Last year ('99)</td>
<td>28.1%</td>
</tr>
<tr>
<td>1998 or before</td>
<td>26.8%</td>
</tr>
<tr>
<td><strong>Seasons</strong></td>
<td></td>
</tr>
<tr>
<td>Winter</td>
<td>5.4%</td>
</tr>
<tr>
<td>Spring</td>
<td>18.1%</td>
</tr>
<tr>
<td>Summer</td>
<td>33.7%</td>
</tr>
<tr>
<td>Fall</td>
<td>22.7%</td>
</tr>
<tr>
<td>Christmas</td>
<td>20.2%</td>
</tr>
<tr>
<td><strong>Summary Activities</strong></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>87.9%</td>
</tr>
<tr>
<td>Theaters</td>
<td>89.2%</td>
</tr>
<tr>
<td>Theme Park</td>
<td>48.5%</td>
</tr>
<tr>
<td>Historic sites</td>
<td>58.4%</td>
</tr>
<tr>
<td>Water Activities</td>
<td>26.9%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>17.4%</td>
</tr>
<tr>
<td>Excursions</td>
<td>22.3%</td>
</tr>
<tr>
<td>Museums</td>
<td>10.3%</td>
</tr>
<tr>
<td><strong>No. of Shows</strong></td>
<td>3.9</td>
</tr>
<tr>
<td><strong>Length of Stay</strong></td>
<td></td>
</tr>
<tr>
<td>Avg. Days</td>
<td>4.0</td>
</tr>
<tr>
<td><strong>Accomodations</strong></td>
<td></td>
</tr>
<tr>
<td>Hotel/Motel</td>
<td>71.3%</td>
</tr>
<tr>
<td>RV Park/Campgmrd</td>
<td>7.0%</td>
</tr>
<tr>
<td>Resort</td>
<td>5.9%</td>
</tr>
<tr>
<td>Condo</td>
<td>4.2%</td>
</tr>
<tr>
<td>Timeshare</td>
<td>7.9%</td>
</tr>
<tr>
<td>Friends/Family</td>
<td>3.2%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>0.4%</td>
</tr>
<tr>
<td><strong>Main Mode of Transportation</strong></td>
<td></td>
</tr>
<tr>
<td>Personal Vehicle</td>
<td>83.3%</td>
</tr>
<tr>
<td>Rented Vehicle</td>
<td>0.3%</td>
</tr>
<tr>
<td>RV/Camper</td>
<td>6.3%</td>
</tr>
<tr>
<td>Tour Bus</td>
<td>7.2%</td>
</tr>
<tr>
<td>Fly/Rent/Drive</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

Source: Montgomery Consulting.
- In 2000, roughly 15 percent of the overnight visitors came from an area within 100 miles, which represents the local resident market. Fifty-one percent traveled 300 miles or more to Branson. It is a regional draw.

- According to this data set, the average age of overnight visitors was 57.1 years, with 60.3 percent over age 55 and only 7.6 percent under 35. The average is up slightly from 55.3 percent in 1998. However, a separate set of data from the same source (D.K. Shifflet Co., shown elsewhere) that compared Branson with other competitive resorts in 1998 indicated an average age of 48.5 years and 35.3 percent 55 and older, 42.3 percent 35 to 54, and 20.4 percent under 35 years of age. HPC concludes that the latter data set is closer to the truth and that the 2000 survey is seriously flawed by biases in respondent selection or response. The “Mature” generation drawn to Branson for live theater shows seems to dominate the sample, with resulting distortion of the data.

- Average income of Branson visitors is estimated at $52,400.

The above information establishes a general framework for evaluating present circumstances and creating future strategies for the Branson area.

**Branson Non-Visitor Study**

Recognizing that visitors to Branson have been studied in depth over the past decade but no statistical information exists on regional populations that do not visit the area, Branson leaders commissioned a telephone survey by Montgomery Consulting to close that gap. The survey was conducted in the spring of 2001, and consisted of 502 completed interviews with travelers who knew about Branson but had not visited the area, at least not in the past five years. Results are summarized in Table 3-3. Only 21.3 percent of those interviewed had ever been to Branson, although one-third of seniors had visited several years ago. Results are interpreted as follows:

- In terms of last destination visited, the indication is that travelers scatter to a wide variety of destinations. Texas is a favorite of many, particularly Seniors and GenXers. Las Vegas and Orlando scored relatively high marks with all categories of travelers. Seniors/Matures don’t care for beaches, but GenXers and Boomers do. Kansas City and Chicago received surprisingly high results among GenXers.

- “Don’t have what they wanted” was the reason most often given for not visiting the Branson/Lakes area. There are a wide variety of other reasons, including simply not being interested in Branson for unspecified reasons.

- When asked what activities are desired in a destination, the most often mentioned are all available in the Branson area despite the prior response that the area does not have what is wanted. Perhaps that perception is different from
## Table 3-3

### 2001 Branson Non Visitor Study

<table>
<thead>
<tr>
<th>Household Composition</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>19.0%</td>
<td>21.2%</td>
<td>32.6%</td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td>14.8%</td>
<td>19.9%</td>
<td>28.8%</td>
</tr>
<tr>
<td><strong>Adults</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Seniors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Est Number Having Visited</strong></td>
<td>16,760,919</td>
<td>4,909,740</td>
<td>12,129,891</td>
</tr>
<tr>
<td><strong>Adjusted Market Penetration</strong></td>
<td>17.7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 2 Last Vacation Destination

- **Texas Destinations**
  - Las Vegas: 8.0%
  - Disney World/Orlando: 4.6%
  - Beaches: 4.6%
  - Kansas City: 3.6%
  - Chicago: 3.0%
  - Mountains/Skiing: 2.6%
  - Smokies: 2.6%
  - St. Louis: 1.8%
  - Other West: 20.7%
  - Other South: 10.2%

### 3 Why Not Visit Branson?

- Didn’t Have What Wanted: 17.9%
- Timing not Right: 16.7%
- Committed to another place: 9.2%
- Friends wanted go elsewhere: 8.4%
- Distance/too far: 7.4%
- Variety/Something different: 7.2%
- $$$/ Better deal elsewhere: 6.6%
- No Internet: 12.9%
- Not Interested at all: 10.8%
- Not interested in C M: 2.0%
- Neutral Responses (net): 7.6%
- Negative Responses (net): 6.6%

### 4 What Activities Seek Out

- SIGHTSEEING: 38.8%
- Water/Lake Activities: 29.1%
- Outdoor Activities (not h2o): 26.3%
- Shows/Theaters: 17.9%
- Theme Parks: 15.7%
- Shopping: 12.5%
- Golf/Sports: 11.2%
- Historic Sites: 8.8%
- Museums: 6.0%
- Dining: 5.2%
- Relaxing: 4.6%

### 5 Taken Motor Coach Tour L 2 yrs

- 5.40%
Table 3-3 (Continued)

2001 BRANSON NON VISITOR STUDY

<table>
<thead>
<tr>
<th>Household Composition</th>
<th>Generational Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>6 When think of “Branson,” What comes to mind?</td>
<td></td>
</tr>
<tr>
<td>Entertainment (net)</td>
<td>72.1%</td>
</tr>
<tr>
<td>Country Music</td>
<td>28.9%</td>
</tr>
<tr>
<td>Shows/ Entertainment</td>
<td>22.9%</td>
</tr>
<tr>
<td>Music</td>
<td>9.6%</td>
</tr>
<tr>
<td>Silver Dollar City</td>
<td>6.2%</td>
</tr>
<tr>
<td>Misc. Specific Shows</td>
<td>2.8%</td>
</tr>
<tr>
<td>Amusements</td>
<td>1.0%</td>
</tr>
<tr>
<td>Variety of Activities</td>
<td>0.6%</td>
</tr>
<tr>
<td>7 What is Branson Famous for</td>
<td></td>
</tr>
<tr>
<td>Entertainment (net)</td>
<td>78.5%</td>
</tr>
<tr>
<td>Shows/ Entertainment</td>
<td>38.0%</td>
</tr>
<tr>
<td>Country Music</td>
<td>22.3%</td>
</tr>
<tr>
<td>Music</td>
<td>10.4%</td>
</tr>
<tr>
<td>Silver Dollar City</td>
<td>4.4%</td>
</tr>
<tr>
<td>8 What kinds of Activities Does Branson offer (aided)</td>
<td></td>
</tr>
<tr>
<td>Shows/Theaters</td>
<td>68.7%</td>
</tr>
<tr>
<td>Theme Parks</td>
<td>24.5%</td>
</tr>
<tr>
<td>Water/ Lake Activities</td>
<td>19.5%</td>
</tr>
<tr>
<td>Dining</td>
<td>15.1%</td>
</tr>
<tr>
<td>Shopping</td>
<td>14.7%</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>14.1%</td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td>10.0%</td>
</tr>
<tr>
<td>Golf/ Outdoor Sports</td>
<td>8.0%</td>
</tr>
<tr>
<td>Museums</td>
<td>4.0%</td>
</tr>
<tr>
<td>Historic Sites</td>
<td>4.0%</td>
</tr>
<tr>
<td>9 What kinds of Activities Does Branson offer (aided)</td>
<td></td>
</tr>
<tr>
<td>Dining</td>
<td>64.1%</td>
</tr>
<tr>
<td>Shopping</td>
<td>63.1%</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>57.0%</td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td>53.2%</td>
</tr>
<tr>
<td>Golf/ Outdoor Sports</td>
<td>51.8%</td>
</tr>
<tr>
<td>Water/ Lake Activities</td>
<td>43.8%</td>
</tr>
<tr>
<td>Historic Sites</td>
<td>43.2%</td>
</tr>
<tr>
<td>Theme Parks</td>
<td>38.4%</td>
</tr>
<tr>
<td>Museums</td>
<td>36.5%</td>
</tr>
<tr>
<td>Excursions</td>
<td>36.3%</td>
</tr>
<tr>
<td>Shows/ Theaters</td>
<td>24.5%</td>
</tr>
<tr>
<td>10 What entertainer would you like to see come to Branson</td>
<td></td>
</tr>
<tr>
<td>Country Performers (net)</td>
<td>18.1%</td>
</tr>
<tr>
<td>Country Stars (general)</td>
<td>3.0%</td>
</tr>
<tr>
<td>Garth Brooks</td>
<td>3.0%</td>
</tr>
<tr>
<td>George Strait</td>
<td>2.8%</td>
</tr>
<tr>
<td>Misc. Current CW performers</td>
<td>2.4%</td>
</tr>
<tr>
<td>Faith H</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

Source: Montgomery Consulting and BLACC/CVB Research Committee.
reality. Seniors/Matures enjoy sightseeing and shows and are less interested in outdoor activities and theme parks than are GenXers and Boomers.

- Some GenXers reported taking bus tours (3.9%), but Boomers and Matures participated at 5.9% and 6.1 percent, respectively.

- The perception of Branson among all respondents was that entertainment and music shows are the defining recreation amenities. A significant 28.9 percent identified country music as a feature. One troubling aspect of the results is that scenery, lakes and outdoor activities did not even show up on the radar screen in this context. However, responses to the following question about activities available did show those opportunities are recognized.

HPC concludes that the information generated by the Non-Visitor Study suggests an imbalance in the promotional efforts of Branson, with far too much emphasis on the entertainment industry at the expense of the scenic and outdoor recreation opportunities that were the original foundation of area tourism.
Section 4

POPULATION OF THE REGION BY AGE GROUP
AND GENERATION

Much attention has been paid in recent years to the differences in attitudes exhibited by different generations and the effect of that diversity on marketing. In this context the focus is on travel and the infrastructure needed to appeal to the taste, habits and attitudes of each available market segment. In this section of the report, projections of the regional population provide a basis for planning marketing strategies through 2020.

Population by Age Group 2000 to 2020

The market for present and future overnight travel to the Branson/Lakes area is defined as resident populations within 500 to 600 miles. Branson has long been a regional destination. Over half of Branson's overnight visitors travel a one-way distance of over 300 miles to get to the area (almost 30 percent travel over 600 miles).

The US Bureau of the Census provides projections of regional population by state and geographic areas of the country. Branson is in the West North Central Region and the market defined herein also includes Iowa, Kansas and Nebraska from that region, but excludes Minnesota, South Dakota and North Dakota. The West South Central Region is included in its entirety – Arkansas, Oklahoma, Louisiana and Texas. The States of Illinois and Indiana are included from the East North Central Region, along with all of the East South Central Region – Kentucky, Tennessee, Alabama and Mississippi. The regional market area is outlined in Figure 4-1.

Data from the 2000 census indicate that the defined market area contained 79.9 million residents. That number is expected to grow to 84.5 million by 2010 and 90.3 million by 2020, a 13 percent increase over 2000. The portions of the West North Central Region and the West South Central Region are closest to Branson, and therefore constitute a primary market area, contained 55.5 percent of the total defined market, or 44.4 million people in 2000. It is projected to grow to 51.7 million residents by 2020. That is a 16.4 percent increase and a rise to 57.3 percent of the defined market.

Demographers and market researchers have developed an elaborate system to categorize generations by birth dates and attitudes conditioned by the circumstances of their formative years through early adulthood. There is no unanimity in definition of generations and their attitudes, but there is agreement on general categories as follows in order of descending age in 2000:

Matures
Figure 4-1

REGIONAL MARKETS FOR THE BRANSON AREA

- States not included in regional market statistics
- Branson Area

MIDWEST

West North Central

East North Central

SOUTH
Born before 1935 and now over 65 years of age. These individuals are the product of depression and World War II. They are characterized as having a profound sense of duty and loyalty, and are hard working and frugal.

**Forgotten Generation**

Now 56 to 65 years old and born between 1936 and 1945, they are often included with the Matures, but are separated by some demographers because they were unaware of the depression of the 1930s and were only marginally influenced by WW II. They share some of the characteristics of early Boomers.

**Baby Boomers**

Generally agreed to include those born between 1946 and 1964, a 19 year period. Some experts break this down further by categorizing those born 1960 to 1964 as Tweeners. Thus, Boomers are age 37 to 55, or 50 if Tweeners are separated. The “me” generation, Boomers are seen as self-centered big spenders, willing to break any rules to get what they want and think they deserve. Perpetual teenagers forced to mature. The group exhibits strong family orientation.

**Tweeners**

Squeezed between Boomers and GenXers, they exhibit characteristics of both. Age 37 to 41 in 2000.

**GenXers**

The Boomers took all the good jobs leaving this generation to fend for itself. This group is entrepreneurial, diverse in outlook and resourceful.

**Echo Boom**

Offspring of the Baby Boomers creating another bubble of population that will cycle through the economy in decades to come. Raised in the computer age, they are technologically sophisticated and very independent. They tend to enjoy individual and extreme sports rather than team activities. Age 7 to 24.

In Table 4-1 we have indicated the generational categories on the projections of population for the Branson regional market as they cycle through the age spectrum as a guide to how ingrained attitudes may affect the future of visitation to Branson (and other resorts). As the Boomers/Tweeners age over the next two decades, and the robust numbers of following generations cycle through, the overall distribution of population will flatten out and matures will be a growing percentage of the total population. But the
Table 4-1
REGIONAL POPULATION PROJECTIONS BY AGE AND GENERATION
2000 TO 2020

<table>
<thead>
<tr>
<th>Legend (Approximate Age in 2000)</th>
<th>Echo</th>
<th>Gen X</th>
<th>Tweeners</th>
<th>Boomers</th>
<th>Forgotten</th>
<th>Mature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Under 25</td>
<td>25 to 34</td>
<td>35 to 44</td>
<td>45 to 54</td>
<td>55 to 64</td>
<td>65+</td>
</tr>
<tr>
<td>Census 2000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>US Total</td>
<td>285,231</td>
<td>100,958</td>
<td>40,426</td>
<td>45,664</td>
<td>38,141</td>
<td>24,624</td>
</tr>
<tr>
<td>W North Central</td>
<td>12,921</td>
<td>4,609</td>
<td>1,674</td>
<td>2,017</td>
<td>1,715</td>
<td>1,127</td>
</tr>
<tr>
<td>W South Central</td>
<td>31,445</td>
<td>11,971</td>
<td>4,568</td>
<td>4,936</td>
<td>4,001</td>
<td>2,550</td>
</tr>
<tr>
<td>E North Central</td>
<td>18,500</td>
<td>6,645</td>
<td>2,643</td>
<td>2,945</td>
<td>2,444</td>
<td>1,570</td>
</tr>
<tr>
<td>E South Central</td>
<td>17,023</td>
<td>5,993</td>
<td>2,369</td>
<td>2,656</td>
<td>2,306</td>
<td>1,567</td>
</tr>
<tr>
<td>Regional Market Total</td>
<td>79,889</td>
<td>29,218</td>
<td>11,263</td>
<td>12,553</td>
<td>10,485</td>
<td>6,815</td>
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<tr>
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</table>

Note: W North Central includes States of Missouri, Iowa, Nebraska and Kansas. Excluded are Minnesota, South and North Dakota.
W South Central includes States of Arkansas, Louisiana, Oklahoma and Texas.
E North Central includes States of Indiana and Illinois.
E South Central includes States of Kentucky, Tennessee, Alabama and Mississippi.

Table 4-1 (Continued)

REGIONAL POPULATION PROJECTIONS BY AGE AND GENERATION
2000 TO 2020

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<th>Echo</th>
<th>Gen X</th>
<th>Tweeners</th>
<th>Boomers</th>
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<th>Mature</th>
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<td>45 to 54</td>
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<td>12.24</td>
<td>11.60</td>
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Note: W North Central includes States of Missouri, Iowa, Nebraska and Kansas. Excluded are Minnesota, South and North Dakota.
W South Central includes States of Arkansas, Louisiana, Oklahoma and Texas.
E North Central includes States of Indiana and Illinois.
E South Central includes States of Kentucky, Tennessee, Alabama and Mississippi.

Matures will be a much healthier and more active generation than their current counterparts due to youthful attitudes and improved health care.

It is possible that too much is being made of generational differences in a long-term behavioral context. Demographers tend to treat the attitudes and preferences of each generation as if they are somehow cast in stone. But age, economic circumstance and environment cause change. People do not lose their ability to learn and adjust as they age, even though old habits may inhibit the process. Moreover, even within generations, there is great diversity and the characteristics are simply a generalization, not a blueprint for all members of each generation to follow. It seems to be a historical obligation of youth to rebel against the behavioral patterns of prior generations, only to establish their own conformities that become fodder for attack by the next generation.

Almost all aspects of society are in a constant state of flux, and business communities either transform to meet new demands or fall by the wayside in the process. Recognition of the need for change is the first essential step in preparing for the future. Creating an environment that fosters implementation of change is the next critical step. Branson appears to be on track to accomplish that goal with timely action on several fronts.
Section 5

COMPARISON OF BRANSON WITH SELECTED DESTINATIONS

In this section of the report, qualitative and quantitative data are presented concerning a number of competitive resort destinations to provide a framework for the analysis of future opportunities in Branson. Included are the three largest metropolitan areas of Missouri, all of which draw overnight pleasure visitors. A diverse array of destinations is purposefully selected, but in reality no two areas are precisely alike. Climate, market size, physical features, leisure activities and accommodations, for example, are different in each case, and each offers an unique set of features, some of which may be applicable for the future of Branson.

Market, Physical and Recreation Infrastructure Comparison

Branson's history as a recreation destination started as a river side fishing resort in the scenic Ozarks Mountains, bolstered by the best selling book "The Shepherd of the Hills" in 1907, which created nationwide interest in the area. The area had modest success until the early 1960s, when a dam created Table Rock Lake, music shows began to sprout up, Shepherd of the Hills Old Mill Theater opened and Silver Dollar City opened as a small themed attraction above Marvel Cave. At the same time, the Interstate Highway network was being completed and a booming economy caused private auto ownership to explode, allowing families to broaden their destination choices. The stage was set for continued expansion of Branson as a destination resort of increasing diversity, which took a decided turn toward emphasis on indoor music theater entertainment in the 1980s and 1990s. Thus, in addition to the traditional tourism operations, Branson once again received national attention, this time for the concentration of theaters and seating in its indoor venues (discussed elsewhere in more detail).

At the same time Branson was growing up, other resorts were being created or expanding, providing alternatives to the traveling public. The following paragraphs present a thumbnail sketch of some of those resort destinations, along with the three largest metropolitan areas in Missouri.

Pigeon Forge/Gatlinburg, TN

The Pigeon Forge/Gatlinburg area is probably the closest comparable to Branson in that it is a mountain destination appealing to a primarily regional visitor market. It has a high-quality major theme park also majority owned and operated by Silver Dollar City, Inc., and entrepreneurs and municipalities there have attempted to develop a significant indoor theater industry. The area has a wide variety of facilities for visitor recreation and entertainment. The area offers 19,900 hotel/motel rooms, about the same...
inventory as Branson. Orientation is to the family market, and a new Ripley's aquarium in Gatlinburg (opened late last year), plus a water park next to and owned by Dollywood (opened for this season) reinforce that focus. HPC estimates overnight visitors to Pigeon Forge/Gatlinburg at 4.8 million in 2000.

Nashville, TN

"Music City USA" is a favorite slogan of Nashville, which has long been recognized as a center of talent discovery and music recording, particularly for country western performers. It is home to the Grand Ole Opry and the Country Music Hall of Fame and Museum. Music Row and the Ryman Auditorium downtown are in the heart of the recording sector of the city. It is also a thriving commerce center of the south. HPC estimates that Nashville attracted 9.5 million overnight visitors in 2000, of which 5.2 million were there on pleasure trips. The area has about 37,500 hotel/motel rooms. Opryland theme park was a major facility drawing over two million annual visitors, but was closed after the 1997 season and replaced by Opry Mills, a mixed use retail and entertainment center that features a Bass Pro Outdoor World facility.

Myrtle Beach, SC

Visitors to Myrtle Beach are drawn primarily by a combination of mild climate, ocean beaches and golf. The Grand Strand is a 60-mile stretch of beach, behind which more than 100 golf courses have been developed. An almost complete array of recreation amenities has also been developed, although the area lacks a major theme park. Indoor music theater complexes have been created in North Myrtle Beach and at Broadway at the Beach in Myrtle Beach, but on a smaller scale than Branson. The area has about 60,000 hotel/motel and condo rental rooms that accommodate an estimated 7.0 million annual visitors, mostly on extended-stay vacations. The beachfront is highly developed with low to mid-rise structures. It is a moderately priced area, but most of the major chains are represented.

Tunica, MS

Gaming was approved in Mississippi in 1990 and the first casino was built in 1992. There are now 31 casinos in the state, ten of which are in the Tunica area and six contain showrooms. The largest casino showroom seats 2,500 guests. In addition, the municipal Tunica Arena and Exposition Center offers 6,500 seats and 48,000 square feet of exhibit space are available in a multi-purpose building. Tunica represents the most direct competition to Branson theaters, and has developed a significant bus-tour trade estimated at about 8,000 groups per year at present. There are 6,500 hotel rooms operating at a Vegas-like occupancy of 88 percent and a low average rate of $55.00 per occupied room. This yields an estimated 2.0 million overnight visitors annually. Local officials estimate that there are an additional eight million day visitors to the casinos annually. Tunica, which is within an hour drive of all of metropolitan Memphis, TN, leads Biloxi in gaming revenues and visitors by a small margin, but Biloxi
has received more national publicity. This growth all occurred in the past eight years, and strong growth can be expected to continue.

Wisconsin Dells, WI

The Dells combines the scenic beauty of a unique river/lake environment with a climate that is conducive to year-round activities for those accustomed to cold winter weather. Some man-made facilities have been built to overcome the cold by developing extensive indoor water park facilities along with the summer parks. Several hotels have adopted tropic themes and actively compete for winter business by promoting simulated tropical vacations close to home. Wisconsin Dells developed over decades and now offers 7,500 hotel/motel rooms, plus campgrounds, etc. Roughly 2.5 million people visited the area in 2000, and visitation increased steadily throughout the 1990s. Most visitors are from Milwaukee, Madison and other Wisconsin locations, but Chicago, IL, and Minneapolis/St. Paul, MN, residents are major visitor components. The Dells represent direct competition to Branson particularly for the summer family trade. It has a few dinner shows/music theaters, but that is not a major element of appeal. A full complement of amusements and minor attractions are available.

Hot Springs, AR

The thermal waters of 47 springs on the slope of Hot Springs Mountain give the area its name and provide the reason for development of extensive hotels and spas in the area. The Hot Springs Arts District is a historical district where artists and gallery owners have renovated Victorian and early 20th Century buildings to form a center of art galleries, antique shops and gift stores featuring international, national and local artists. Art festivals are a feature of the present visitor appeal, supplementing the lakes, mountains and natural beauty. The area around the city is a National Park containing rivers, lakes and scenic areas and providing water sports and landside outdoor recreation opportunities. There are approximately 4,000 commercial accommodations in the area, which accommodate about 1.0 million overnight visitors per year. National Parks Department estimates 3.3 million visitors per year, mostly day trips.

(Eureka Springs, AR, located within an hour south of Branson has a similar origin and history as Hot Springs, but is a little smaller. Due to the similarities, details are not repeated here).

Orlando/Walt Disney World, FL

The Orlando area has been transformed from a refueling stop for visitors on their way to beach areas in central and south Florida 30 years ago to the world’s largest and most recognizable destination resort. Disney was the catalyst and most of the major players in US tourism have since joined the chorus. Eight of the thirteen largest themed attractions in the country are located there, generating more than 60 million attendances annually (four Disney parks represent two-thirds of those visits). The area has 102,000 rooms and attracts over 42 million visitors annually, including many from
overseas. Universal Studios and Anheuser Busch are other major players in the market. Virtually every conceivable form of man-made recreation (except those relying on winter climate and natural features) is available in the Orlando area today. Disney not only intercepted existing tourism flows, they created a complete resort designed to become a destination in its own right. There is probably no other entity in the world that could produce such a result. The Disney World/Orlando area lodgings and attractions command top dollar for their product, with premiums of 10 percent of more compared to normal rates in other resorts in the country.

Las Vegas, NV

Las Vegas is another larger-than-life tourist destination. Las Vegas is founded on gambling. Fourteen of the 15 largest hotels in the country are in Las Vegas, ranging from 2,814 to 5,005 rooms – all contain major casinos. Showroom and lounge entertainment have always been a feature of the Las Vegas environment, with many of the top entertainers in the country performing on a rotating schedule basis. The most elaborate productions of music, magic, comedy, variety and specialty shows are found in Las Vegas. Over 120,000 rooms and 63 casinos serve the 34 million annual visitors. Lodging occupancies run at 88 percent, and experts continually marvel that with each new monster hotel-casino, visitor counts rise to keep pace. Thousands more rooms are planned for development in the future. Originally marketed primarily to adult gamblers, the last decade saw development of more facilities for families with children, often with mixed results, particularly in terms of gaming revenues. Las Vegas draws from throughout the country and 11 percent of visitors are international travelers, but Southern California continues to be the major source, representing 25 percent of all visitors. Gaming is legal throughout the State of Nevada, but Las Vegas continues to be the leader with a glitz and glitter unique in the world.

Springfield, MO

Springfield is the third largest metropolitan area in Missouri and is not a tourist destination. However, it is just 43 miles north of Branson, and recent completion of US Highway 65 to full freeway standards between the two could make these two cities almost indistinguishable in the context of market configuration. Bass Pro Shops Outdoor World is a sporting goods facility masquerading as a recreation attraction. BPSOW has been serving a growing number of patrons estimated in the four to five million range in recent years. The company describes its venue as Missouri’s #1 tourist attraction. There is no admission charge, it is primarily a retail facility, and most visitors are locals, so that claim is questionable. Nonetheless, it has a strong appeal to tourists who have heard about its elaborate aquariums and indoor landscape. The facility has expanded over the years and now includes 300,000 square feet under roof. Wonders of Wildlife – American National Fish and Wildlife Museum is scheduled to open soon on an adjacent site, and represents an investment of $52 million in 91,000 square feet of space. That is $571 per square foot, which should make it a quality facility. Springfield includes the normal array of museums and small attractions primarily serving the regional resident population, but also drawing some tourists while they are in the area.
Springfield has 5,600 hotel rooms and generates roughly 1.8 million overnight visitors. That number includes an estimated 45 percent not on a pleasure trip, so the true number of tourists is about 1.0 million.

**Kansas City and St. Louis, MO**

The two largest metropolitan areas in Missouri are included here to remind readers that urban areas are also tourist (pleasure trip) destinations, not just business end points. The most common reason for a pleasure trip to an urban area is to visit friends or relatives, but there are many other motivations, including cultural and/or historical tourism, non-vocational educational trips, etc. Or to attend an event of interest including anything from sports to ethnic or national festivals. Travel motivations are very diverse and, in the context of the purpose of this study, some of those normally urban travel motivations may be satisfied by creating specific new facilities in the Branson area.

St. Louis attracts roughly eight million overnight visitors annually, roughly half of whom are on pleasure trips. Kansas City's numbers are smaller. It is significant tourism. Facilities are very diverse, most developed primarily to serve local residents, but also available to visitors. Both cities contain major regional theme parks.

**Summary of Facilities at Selected Destination Resorts.**

Table 5-1 contains a summary of facilities available at the destinations discussed above. Natural resources are often the key to initial impetus for resort destination development, such as Myrtle Beach, where the ocean beaches provided the visitor appeal but man-made golf courses and other facilities have become equal parts of the draw. Nashville has a rich history, but music is the primary foundation of its modern day tourism. Las Vegas owes its creation to underworld characters who developed a gaming oasis on an otherwise inhospitable stretch of desert. The intent here is to define some of the most similar destinations in the region, and also to illustrate the diversity and magnitude of resorts in terms of annual visitation and accommodations serving the visitors.

**Branson and Competitive Areas Visitor Profile 1998**

Visitor characteristics for Branson, selected competitive resorts and US travelers as a whole are shown in Table 5-2. The following similarities and differences are worth noting:

- Branson draws fewer visitors under age 35 and a larger proportion over 54 than any of the other resorts and the traveling public as a whole. That results in an average age of 48.5 years, more than 5.5 years above national travelers (see Figure 5-1). Age characteristics have been trending higher for
### Table 5-1

**COMPARABLE ATTRACTION PROFILES OF BRANSON AND OTHER COMPETITORS**

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<tr>
<td>Gaming</td>
<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Live Entertainment Theaters</td>
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<td>Museums</td>
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<td></td>
<td></td>
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<td></td>
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<tr>
<td>Signature Restaurants</td>
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<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Zoo</td>
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<td></td>
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</tbody>
</table>

* 1 Pleasure Trips only

Source: Chamber of Commerce and CVB. Branson, Orlando, Las Vegas, Pigeon Forge/Gatlinburg, Nashville, Palm Springs, Myrtle Beach, Tunica, St. Louis, Wisconsin Dells, Kansas City, Hot Springs, Springfield, Eureka Springs, and Harrison Price Company.
<table>
<thead>
<tr>
<th>Visitor Profile</th>
<th>Branson</th>
<th>Gatlinburg / Pigeon Forge</th>
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<th>Nashville</th>
<th>Orlando</th>
<th>Las Vegas</th>
<th>USA</th>
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<td>31.4%</td>
<td>39.0%</td>
<td>34.1%</td>
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<tr>
<td></td>
<td>35-54</td>
<td>42.3%</td>
<td>40.0%</td>
<td>41.7%</td>
<td>41.4%</td>
<td>42.8%</td>
<td>40.9%</td>
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<tr>
<td></td>
<td>55+</td>
<td>37.3%</td>
<td>20.6%</td>
<td>17.8%</td>
<td>27.2%</td>
<td>18.2%</td>
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<tr>
<td>Avg Age</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>48.5</td>
<td>42.1</td>
<td>41.5</td>
<td>44.8</td>
<td>41.3</td>
<td>43.9</td>
<td>43.0</td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td>52,600</td>
<td>51,300</td>
<td>55,200</td>
<td>57,100</td>
<td>59,800</td>
<td>61,200</td>
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<tr>
<td>Distance Traveled</td>
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<tr>
<td>100 miles or less</td>
<td>9.0%</td>
<td>20.1%</td>
<td>11.4%</td>
<td>7.1%</td>
<td>15.7%</td>
<td>6.0%</td>
<td>25.3%</td>
</tr>
<tr>
<td>101 miles +</td>
<td>91.0%</td>
<td>79.9%</td>
<td>88.6%</td>
<td>92.9%</td>
<td>84.3%</td>
<td>94.0%</td>
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<td>Main Mode of Transportation</td>
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<td></td>
<td></td>
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<td></td>
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<tr>
<td>Auto Travel</td>
<td>64.7%</td>
<td>93.0%</td>
<td>88.6%</td>
<td>84.1%</td>
<td>64.6%</td>
<td>57.9%</td>
<td>81.7%</td>
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<tr>
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<td>2.4%</td>
<td>0.9%</td>
<td>2.3%</td>
<td>9.4%</td>
<td>30.1%</td>
<td>36.2%</td>
<td>10.4%</td>
</tr>
<tr>
<td>Other</td>
<td>12.9%</td>
<td>6.1%</td>
<td>9.1%</td>
<td>6.5%</td>
<td>5.3%</td>
<td>5.9%</td>
<td>7.9%</td>
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<tr>
<td>Purpose of Stay</td>
<td>Vacation</td>
<td>80.7%</td>
<td>81.6%</td>
<td>82.3%</td>
<td>39.8%</td>
<td>71.9%</td>
<td>64.0%</td>
</tr>
<tr>
<td></td>
<td>Non-Vacation</td>
<td>19.3%</td>
<td>18.4%</td>
<td>17.7%</td>
<td>60.2%</td>
<td>28.1%</td>
<td>36.0%</td>
</tr>
<tr>
<td>Top Activities</td>
<td>Entertainment</td>
<td>44.2%</td>
<td>48.6%</td>
<td>37.6%</td>
<td>27.0%</td>
<td>52.2%</td>
<td>52.8%</td>
</tr>
<tr>
<td>Theme Park</td>
<td>42.6%</td>
<td>32.6%</td>
<td>16.7%</td>
<td>7.0%</td>
<td>78.6%</td>
<td>11.4%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Touring by auto, bus</td>
<td>37.6%</td>
<td>47.5%</td>
<td>23.6%</td>
<td>33.3%</td>
<td>18.5%</td>
<td>28.1%</td>
<td>20.9%</td>
</tr>
<tr>
<td>Shopping</td>
<td>37.0%</td>
<td>50.0%</td>
<td>39.6%</td>
<td>33.4%</td>
<td>43.3%</td>
<td>32.2%</td>
<td>27.6%</td>
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<tr>
<td>Dining</td>
<td>32.8%</td>
<td>44.6%</td>
<td>34.3%</td>
<td>35.4%</td>
<td>42.7%</td>
<td>41.6%</td>
<td>27.6%</td>
</tr>
<tr>
<td>Cultural/Play, Mus.</td>
<td>26.9%</td>
<td>12.7%</td>
<td>11.8%</td>
<td>19.4%</td>
<td>4.2%</td>
<td>8.1%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Shows (ante)</td>
<td>23.6%</td>
<td>9.5%</td>
<td>5.1%</td>
<td>6.7%</td>
<td>2.5%</td>
<td>8.1%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Festival, Craft Fair</td>
<td>22.6%</td>
<td>18.2%</td>
<td>4.2%</td>
<td>7.3%</td>
<td>2.9%</td>
<td>2.2%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Beach/Waterfront</td>
<td>4.8%</td>
<td>0.7%</td>
<td>77.7%</td>
<td>1.1%</td>
<td>13.4%</td>
<td>1.3%</td>
<td>15.0%</td>
</tr>
<tr>
<td>Gamble</td>
<td>1.2%</td>
<td>3.0%</td>
<td>0.8%</td>
<td>0.8%</td>
<td>0.7%</td>
<td>76.8%</td>
<td>6.5%</td>
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<td>Paid Accomodations</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paid Hotel/Motel</td>
<td>90.4%</td>
<td>96.7%</td>
<td>86.2%</td>
<td>65.2%</td>
<td>81.9%</td>
<td>65.8%</td>
<td>56.5%</td>
</tr>
<tr>
<td>Paid Non-Hotel/Motel</td>
<td>73.1%</td>
<td>72.1%</td>
<td>59.0%</td>
<td>59.6%</td>
<td>72.8%</td>
<td>22.9%</td>
<td>42.2%</td>
</tr>
<tr>
<td>Regional Origin of Travel</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East South Central</td>
<td>5.2%</td>
<td>36.6%</td>
<td>5.0%</td>
<td>29.1%</td>
<td>4.4%</td>
<td>1.0%</td>
<td>5.6%</td>
</tr>
<tr>
<td>South Atlantic</td>
<td>4.4%</td>
<td>33.3%</td>
<td>67.3%</td>
<td>22.3%</td>
<td>49.3%</td>
<td>4.3%</td>
<td>18.9%</td>
</tr>
<tr>
<td>East North Central</td>
<td>13.1%</td>
<td>22.0%</td>
<td>10.1%</td>
<td>22.2%</td>
<td>14.2%</td>
<td>9.2%</td>
<td>16.3%</td>
</tr>
<tr>
<td>West South Central</td>
<td>33.6%</td>
<td>3.4%</td>
<td>0.5%</td>
<td>8.7%</td>
<td>5.9%</td>
<td>7.2%</td>
<td>11.4%</td>
</tr>
<tr>
<td>West North Central</td>
<td>37.4%</td>
<td>1.1%</td>
<td>1.5%</td>
<td>6.6%</td>
<td>4.0%</td>
<td>3.1%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Middle Atlantic</td>
<td>2.0%</td>
<td>3.4%</td>
<td>12.6%</td>
<td>5.7%</td>
<td>13.0%</td>
<td>5.3%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Pacific</td>
<td>2.3%</td>
<td>0.4%</td>
<td>0.1%</td>
<td>2.3%</td>
<td>2.9%</td>
<td>51.7%</td>
<td>15.8%</td>
</tr>
<tr>
<td>New England</td>
<td>0.3%</td>
<td>0.0%</td>
<td>2.8%</td>
<td>2.5%</td>
<td>4.5%</td>
<td>1.9%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Mountain</td>
<td>1.8%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.7%</td>
<td>1.8%</td>
<td>16.4%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

VISITOR AGE PROFILE IN SELECTED DESTINATION AREAS

Figure 5-1
several years and that is a major cause of concern for local business and civic leaders.

- Incomes of visitors to Branson are lower than most competitive areas, partially because of a higher proportion of retirees and regional income characteristics.

- Eighty percent or more of overnight visitors to these resorts traveled a one-way distance of 100 miles or more.

- Among all US travelers, 81.7 percent travel by private auto, which is also true of the regional resorts. The national/international resorts of Orlando and Las Vegas are accessed by air by 30.1 percent and 36.2 percent, respectively.

- Over 80 percent of visitors to Branson, Pigeon Forge and Myrtle Beach are vacationers. Only 40 percent of Nashville visitors are vacationers, which is a difficult statistic to believe even though it is primarily an urban environment. It is equally hard to believe that 36 percent of visitors to Las Vegas are not on pleasure trips, although it does have a growing industrial base because of very favorable business and personal tax rates.

- Top activities generally reflect the dominant recreation features offered. Orlando visitors go to theme parks (78.6%), beaches are big in Myrtle Beach (77.7%) and gambling is king in Las Vegas (76.8%). Entertainment gets high scores, representing as much as twice the national average. Shopping and dining are universal.

- Most visitors to four of the resorts, including Branson, use paid accommodations (81.9%+) because few have friends or relatives to stay with in the resort areas. Nashville is an exception because it has a large resident population relative to its tourism. Las Vegas again registers as an anomaly because D.K. Shifflet Co. apparently believes that guests in casino hotels are all on comps, which is not true.

- Length of stay is 5.5 days in Myrtle Beach and 5.6 in Orlando, both significantly higher than the national average of 3.9 days. The others approximate the average and Branson is at 4.3 days.

- Summer is the dominant season in all but Orlando, where spring is slightly higher. However, when fall and Christmas are combined, they are equal to or greater than summer in Branson, Nashville, Orlando and Las Vegas. Most have a favorable seasonal pattern.

- As would be expected, origin of visitors is concentrated in the general region of the resort's location.
HPC interprets the above to indicate that Branson marketing efforts should be concentrated in areas within 300 miles, with a very targeted approach for major population centers beyond that radius. Also, families and a younger audience should be the focus of new visitor generation. Branson's "Image" should be adjusted to reach a broader audience.
Section 6
MARKETING RESOURCES OF BRANSON/LAKES AREA
CHAMBER OF COMMERCE & CVB COMPARED TO SIMILAR OPERATIONS

The resources available to the Branson/Lakes Area Chamber of Commerce & CVB (BLACC/CVB) determine the reach and effectiveness of their marketing efforts, provided those resources are utilized efficiently. This issue is the subject of this section of the report. Marketing is inextricably linked with the availability and quality of tourism infrastructure, which is covered elsewhere in this report.

Marketing Activities and Resources

Table 6-1 contains a summary of data on marketing activities of 17 destinations in the form of source and application of funds summaries for the Chamber of Commerce and Convention and Visitors Bureaus (CC/CVB) representing each. The data was obtained from publications by the International Association of Convention and Visitors Bureaus (1998 IACVB Foundation CVB Financial Survey) and through original research by HPC. It should be noted that the comparison covers only funds channeled through those quasi-public, normally not-for-profit agencies charged with the responsibility of collective marketing and promotion for a specified area. In addition to those marketing efforts, most individual enterprises have their own marketing budgets that are in addition to that of the CC/CVB. Resorts that have large operators, such as major hotel chains and theme parks, benefit from the separate marketing programs of those entities, which also reach well beyond the local market and attempt to create new destination tourism. Smaller operators tend to limit their supplemental marketing, if any, to reaching visitors that are already in the area or planning a trip there. The larger the resort environment, the more likely it is to benefit from the effect of private marketing programs that can collectively exceed CC/CVB budgets many times over.

Most resources available to CC/CVBs come from taxes levied on businesses, with an emphasis on those that serve the tourism industry. These are most often in the form of hotel/motel taxes (Transient Occupancy Tax), but often include taxes on restaurant receipts, attraction admissions, etc. Some portion of the taxes are generally put back into the travel/convention industry, usually in the form of support for CC/CVB activities, but also including funding for other purposes that have only a remote connection to the revenue source. Funding for the 17 CVBs studied range from $1.3 million to $23.1 million, with an average of about $10.25 million. Orlando represents the high end, but the Las Vegas CC/CVB is excluded from this list because it is in a high stakes world of its own, generating $150 million in total funding in 2000 and spending $57 million on marketing. BLACC/CVB funding in 1998 (comparable to IACVB data) was $5.2 million, about half the 17-city average.
### Table 6-1

**CHAMBER OF COMMERCE/CVB BUDGET COMPARISON - SOURCE AND APPLICATION OF FUNDS**

<table>
<thead>
<tr>
<th>Description</th>
<th>Branson</th>
<th>Springfield</th>
<th>Pigeon Forge, TN</th>
<th>Gatlinburg, TN</th>
<th>Myrtle Beach, SC</th>
<th>Wisconsin Dells, WI</th>
<th>Virginia Beach, VA</th>
<th>Miami Beach, FL</th>
<th>Palm Beach, FL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FUNDING:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PUBLIC SOURCES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room Tax/Other Business Taxes</td>
<td>2,391</td>
<td>825</td>
<td>1,971</td>
<td>1,190</td>
<td>12,012</td>
<td>4,415</td>
<td>6,367</td>
<td>14,241</td>
<td>7,402</td>
</tr>
<tr>
<td>City/County/State Tax Funds</td>
<td>6,413</td>
<td>2,564</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL PUBLIC SOURCES</strong></td>
<td>2,391</td>
<td>825</td>
<td>8,384</td>
<td>3,744</td>
<td>12,012</td>
<td>4,415</td>
<td>6,367</td>
<td>14,241</td>
<td>7,402</td>
</tr>
<tr>
<td><strong>PRIVATE SOURCES</strong></td>
<td>493</td>
<td>93</td>
<td>261</td>
<td>150</td>
<td>228</td>
<td>285</td>
<td>166</td>
<td>2,413</td>
<td>172</td>
</tr>
<tr>
<td>Membership Dues</td>
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<td>70</td>
<td>7,262</td>
<td>1,195</td>
<td>1,286</td>
<td>7,355</td>
<td>5,027</td>
<td>7,265</td>
<td>4,465</td>
</tr>
<tr>
<td>Advertising/Promotion</td>
<td>888</td>
<td>301</td>
<td>1,502</td>
<td>331</td>
<td>892</td>
<td>557</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL PRIVATE SOURCES</strong></td>
<td>3,651</td>
<td>458</td>
<td>411</td>
<td>1,923</td>
<td>3,003</td>
<td>1,790</td>
<td>1,306</td>
<td>2,413</td>
<td>172</td>
</tr>
<tr>
<td><strong>TOTAL FUNDING</strong></td>
<td>6,042</td>
<td>1,283</td>
<td>8,795</td>
<td>5,266</td>
<td>15,015</td>
<td>6,205</td>
<td>11,275</td>
<td>16,904</td>
<td>7,688</td>
</tr>
</tbody>
</table>

| **EXPENSES SUMMARY** | 1,233 | 424 | 595 | 1,222 | 3,754 | 994 | 2,314 | 4,678 | 1,241 |
| PERSONNEL COSTS | 4,190 | 701 | 2,362 | 905 | 8,258 | 5,350 | 5,027 | 7,265 | 4,465 |
| DIRECT PROMOTION | 1,044 | 150 | 527 | 2,261 | 1,502 | 322 | 2,538 | 3,445 | 1,724 |
| OTHER EXPENSES | 5,471 | 1,034 | 7,323 | 2,563 | 13,174 | 5,595 | 7,836 | 10,698 | 5,900 |
| **TOTAL LINE ITEM EXPENSES** | 6,467 | 1,283 | 8,385 | 6,408 | 13,514 | 6,566 | 9,879 | 15,368 | 5,900 |

As Percent of Total Funding

<table>
<thead>
<tr>
<th>Description</th>
<th>Branson</th>
<th>Springfield</th>
<th>Pigeon Forge, TN</th>
<th>Gatlinburg, TN</th>
<th>Myrtle Beach, SC</th>
<th>Wisconsin Dells, WI</th>
<th>Virginia Beach, VA</th>
<th>Miami Beach, FL</th>
<th>Palm Beach, FL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FUNDING:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL PUBLIC SOURCES</strong></td>
<td>40%</td>
<td>64%</td>
<td>95%</td>
<td>71%</td>
<td>80%</td>
<td>71%</td>
<td>88%</td>
<td>86%</td>
<td>98%</td>
</tr>
<tr>
<td><strong>TOTAL PRIVATE SOURCES</strong></td>
<td>60%</td>
<td>36%</td>
<td>5%</td>
<td>29%</td>
<td>20%</td>
<td>29%</td>
<td>12%</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>TOTAL FUNDING</strong></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>EXPENSES SUMMARY</strong></td>
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<td>100%</td>
<td>95%</td>
<td>123%</td>
<td>90%</td>
<td>106%</td>
<td>86%</td>
<td>91%</td>
<td>75%</td>
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<td>PERSONNEL COSTS</td>
<td>20%</td>
<td>33%</td>
<td>7%</td>
<td>23%</td>
<td>25%</td>
<td>14%</td>
<td>21%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>DIRECT PROMOTION</td>
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<td>85%</td>
<td>83%</td>
<td>55%</td>
<td>59%</td>
<td>96%</td>
<td>45%</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>OTHER EXPENSES</td>
<td>17%</td>
<td>12%</td>
<td>6%</td>
<td>45%</td>
<td>10%</td>
<td>5%</td>
<td>23%</td>
<td>20%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>TOTAL LINE ITEM EXPENSES</strong></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Note: Boxes above containing information on two entities indicate that they are in close proximity. It does not imply that there are any joint marketing efforts. Myrtle Beach, SC, St. Petersburg, FL, and Scottsdale, AZ report only revenues derived from business taxes and government sources, which are a matter of public record. In those cases HPC has added estimates based on industry averages.

Source: International Association of Convention and Visitors Bureaus and Harrison Price Company

6-2
### Table 6-1 (Continued)

**CHAMBER OF COMMERCE/CVB BUDGET COMPARISON - SOURCE AND APPLICATION OF FUNDS**

<table>
<thead>
<tr>
<th>Description</th>
<th>St. Petersburg, FL</th>
<th>Tampa, FL</th>
<th>Orlando, FL</th>
<th>Phoenix, AZ</th>
<th>Scottsdale, AZ</th>
<th>Anaheim, CA</th>
<th>San Diego, CA</th>
<th>San Francisco, CA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FUNDING:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PUBLIC SOURCES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room/Other Business Taxes</td>
<td>14,664</td>
<td>3,974</td>
<td>13,340</td>
<td>3,956</td>
<td>2,845</td>
<td>4,420</td>
<td>9,764</td>
<td>6,781</td>
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<tr>
<td>City/County/State/Province Tax Funds</td>
<td>-150</td>
<td>-450</td>
<td>-500</td>
<td>600</td>
<td>400</td>
<td>150</td>
<td>150</td>
<td>150</td>
</tr>
<tr>
<td><strong>TOTAL PUBLIC SOURCES</strong></td>
<td>14,514</td>
<td>3,524</td>
<td>12,840</td>
<td>3,856</td>
<td>2,445</td>
<td>4,570</td>
<td>9,914</td>
<td>6,931</td>
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<tr>
<td><strong>PRIVATE SOURCES</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Dues</td>
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<td>670</td>
<td>779</td>
<td>1,083</td>
<td>1,653</td>
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<tr>
<td>Advertising/Promotion</td>
<td>169</td>
<td>289</td>
<td>1,238</td>
<td>134</td>
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<td></td>
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<tr>
<td>Publication Subscriptions</td>
<td>-205</td>
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<td>134</td>
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<td>Service Fees</td>
<td>-415</td>
<td>169</td>
<td>134</td>
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<tr>
<td>Coop Advertising</td>
<td>259</td>
<td>253</td>
<td>1,068</td>
<td>610</td>
<td>1,011</td>
<td>692</td>
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<tr>
<td>Convention Services</td>
<td>1,068</td>
<td>288</td>
<td>811</td>
<td>633</td>
<td>381</td>
<td>1,656</td>
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<tr>
<td><strong>TOTAL PRIVATE SOURCES</strong></td>
<td>3,666</td>
<td>821</td>
<td>9,765</td>
<td>2,491</td>
<td>811</td>
<td>7,721</td>
<td>3,390</td>
<td>8,078</td>
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<td><strong>TOTAL FUNDING</strong></td>
<td>18,180</td>
<td>4,345</td>
<td>22,601</td>
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<td>3,256</td>
<td>12,191</td>
<td>13,315</td>
<td>12,906</td>
</tr>
</tbody>
</table>

**EXPENSES SUMMARY**

<table>
<thead>
<tr>
<th>Description</th>
<th>St. Petersburg, FL</th>
<th>Tampa, FL</th>
<th>Orlando, FL</th>
<th>Phoenix, AZ</th>
<th>Scottsdale, AZ</th>
<th>Anaheim, CA</th>
<th>San Diego, CA</th>
<th>San Francisco, CA</th>
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</thead>
<tbody>
<tr>
<td><strong>PERSONNEL COSTS</strong></td>
<td>4,583</td>
<td>1,695</td>
<td>6,654</td>
<td>2,637</td>
<td>1,014</td>
<td>3,432</td>
<td>4,800</td>
<td>4,332</td>
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<tr>
<td><strong>DIRECT PROMOTION</strong></td>
<td>10,082</td>
<td>1,564</td>
<td>13,271</td>
<td>3,241</td>
<td>2,231</td>
<td>8,573</td>
<td>6,686</td>
<td>5,757</td>
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<tr>
<td><strong>OTHER EXPENSES</strong></td>
<td>1,533</td>
<td>530</td>
<td>2,489</td>
<td>687</td>
<td>406</td>
<td>457</td>
<td>1,747</td>
<td>2,547</td>
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<tr>
<td><strong>TOTAL LINE ITEM EXPENSES</strong></td>
<td>16,497</td>
<td>4,219</td>
<td>22,360</td>
<td>6,765</td>
<td>3,861</td>
<td>12,462</td>
<td>12,233</td>
<td>12,838</td>
</tr>
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</table>

**As Percent of Total Funding**

<table>
<thead>
<tr>
<th>Description</th>
<th>St. Petersburg, FL</th>
<th>Tampa, FL</th>
<th>Orlando, FL</th>
<th>Phoenix, AZ</th>
<th>Scottsdale, AZ</th>
<th>Anaheim, CA</th>
<th>San Diego, CA</th>
<th>San Francisco, CA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FUNDING:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL PUBLIC SOURCES</strong></td>
<td>50%</td>
<td>83%</td>
<td>58%</td>
<td>65%</td>
<td>60%</td>
<td>36%</td>
<td>75%</td>
<td>53%</td>
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<tr>
<td><strong>TOTAL PRIVATE SOURCES</strong></td>
<td>20%</td>
<td>17%</td>
<td>42%</td>
<td>35%</td>
<td>20%</td>
<td>64%</td>
<td>25%</td>
<td>47%</td>
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<tr>
<td><strong>TOTAL FUNDING</strong></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>EXPENSES SUMMARY</strong></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL LINE ITEM EXPENSES</strong></td>
<td>90%</td>
<td>86%</td>
<td>97%</td>
<td>96%</td>
<td>90%</td>
<td>100%</td>
<td>99%</td>
<td>96%</td>
</tr>
<tr>
<td><strong>PERSONNEL COSTS</strong></td>
<td>25%</td>
<td>35%</td>
<td>29%</td>
<td>37%</td>
<td>25%</td>
<td>29%</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>DIRECT PROMOTION</strong></td>
<td>55%</td>
<td>41%</td>
<td>57%</td>
<td>40%</td>
<td>55%</td>
<td>71%</td>
<td>50%</td>
<td>45%</td>
</tr>
<tr>
<td><strong>OTHER EXPENSES</strong></td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
<td>10%</td>
<td>4%</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>EXPENSES SUMMARY</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL LINE ITEM EXPENSES</strong></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>PERSONNEL COSTS</strong></td>
<td>20%</td>
<td>40%</td>
<td>30%</td>
<td>39%</td>
<td>26%</td>
<td>29%</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>DIRECT PROMOTION</strong></td>
<td>61%</td>
<td>47%</td>
<td>56%</td>
<td>48%</td>
<td>61%</td>
<td>69%</td>
<td>51%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>OTHER EXPENSES</strong></td>
<td>11%</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
<td>13%</td>
<td>4%</td>
<td>13%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Note: Boxes above containing information on two entities indicates that they are in close proximity. It does not imply that there are any joint marketing efforts.

Myrtle Beach, SC, St. Petersburg, FL, and Scottsdale, AZ report only revenues derived from business taxes and government sources, which are a matter of public record. In those cases, HPC has added estimates based on industry averages.

Source: International Association of Convention and Visitors Bureau and Harrison Price Company
Expenditures by CC/CVBs are limited to funding available, although there are often minor yearly imbalances. IACVB spending summaries are reduced to three basic categories and industry-wide and 17-city ratios to total expenditures are as follows (excluding those with total expenses exceeding $10 million in the industry-wide data):

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Industry-wide</th>
<th>17-City Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Cost</td>
<td>35 - 42 %</td>
<td>14 - 39 %</td>
</tr>
<tr>
<td>Direct Promotion</td>
<td>42 - 46 %</td>
<td>48 - 81 %</td>
</tr>
<tr>
<td>Other Expenses</td>
<td>15 - 18 %</td>
<td>4 - 26 %</td>
</tr>
</tbody>
</table>

The ranges for industry-wide average performance are quite narrow because of the diversity of the participating CC/CVBs in the survey. Areas with over $10 million in funding (not shown) spend a smaller share on personnel (29%) and other expenses (12%), with a larger proportion (59%) going to direct promotion. That is to be expected given that personnel and other costs are largely fixed.

Results for the selected 17-city sample are quite different from the overall results. Ranges are broader partly because some CC/CVBs choose to use their own expense allocations, creating some inconsistency in the data. Moreover, the industry-wide data includes many small cities with limited current tourism or future visitor potential. Those communities pursue more modest goals focusing on industrial/commercial development, which requires smaller budgets. The industry-wide ranges are narrowed by that inclusion.

BLACC/CVB revenues and expenditures for 1996, 1998 and 2000 are shown in Table 6-2, including more detail on costs than are contained in the preceding tabulation. The data indicates that personnel costs were considerably less than industry-wide data for CC/CVBs, but have risen from a very low 12 percent to 19 percent of total costs. Other expenses (16% in 2000) are within the industry-wide range. Direct promotion is a relatively high 65 percent of total expenditures in 2000, a measure of efficiency of the operational purpose of the enterprise.

Relative to the 17-city data, the same pattern exists, with Branson personnel costs lower than average (19% vs. 26%); promotion costs higher at 65 percent compared to 59 percent, and other expenses consuming about the same share of total costs. In all, BLACC/CVB appears to use its available funds efficiently in terms of purpose.

Possible Future Sources of Additional Funding for BLACC/CVB

Approximately, 40 percent of current funding for BLACC/CVB is provided by a Tourism Tax on accommodation, theater, amusement and restaurant revenues of operations.
### Table 6-2

**BRANSON LAKES AREA CHAMBER OF COMMERCE AND CVB**  
**ACTUAL OPERATING RESULTS - 1996; 1998; AND 2000**

<table>
<thead>
<tr>
<th>SUMMARY</th>
<th><strong>FUNDING/PUBLIC</strong></th>
<th><strong>1998</strong></th>
<th><strong>1996</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOURISM TAX</td>
<td>2,390,894</td>
<td>1,733,404</td>
<td>2,562,975</td>
</tr>
<tr>
<td>FUNDING/PRIVATE</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>MEMBERSHIP DUES</td>
<td>493,315</td>
<td>368,597</td>
<td>368,289</td>
</tr>
<tr>
<td>ADVERTISING</td>
<td>1,452,117</td>
<td>1,143,391</td>
<td>827,717</td>
</tr>
<tr>
<td>PUBLICATION SALES</td>
<td>888,297</td>
<td>768,634</td>
<td>586,310</td>
</tr>
<tr>
<td>MERCHANDISE SALES</td>
<td>4,425</td>
<td>10,571</td>
<td>76,715</td>
</tr>
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<td>COOP ADVERTISING</td>
<td>70,357</td>
<td>17,784</td>
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<tr>
<td>INTEREST &amp; OTHER</td>
<td>744,230</td>
<td>1,190,661</td>
<td>574,843</td>
</tr>
<tr>
<td>TOTAL FUNDING</td>
<td>6,043,635</td>
<td>5,233,022</td>
<td>4,996,849</td>
</tr>
<tr>
<td>EXPENSES BY LINE ITEMS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSONNEL COSTS</td>
<td>1,233,089</td>
<td>838,317</td>
<td>590,636</td>
</tr>
<tr>
<td>DIRECT PROMOTION</td>
<td>4,190,072</td>
<td>3,501,405</td>
<td>4,089,238</td>
</tr>
<tr>
<td>OTHER EXPENSES</td>
<td>1,044,186</td>
<td>889,185</td>
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<td>6,467,347</td>
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</table>

<table>
<thead>
<tr>
<th>COST SUMMARY AS PERCENT OF TOTAL COSTS</th>
<th><strong>2000</strong></th>
<th><strong>1998</strong></th>
<th><strong>1996</strong></th>
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</thead>
<tbody>
<tr>
<td>EXPENSES BY LINE ITEMS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSONNEL COSTS</td>
<td>19%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>DIRECT PROMOTION</td>
<td>65%</td>
<td>67%</td>
<td>81%</td>
</tr>
<tr>
<td>OTHER EXPENSES</td>
<td>16%</td>
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<tr>
<td>TOTAL LINE ITEM EXPENSE</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Branson Lakes Area Chamber of Commerce and CVB, and Harrison Price Company.
Table 6-2 (Continued)

BRANSON LAKES AREA CHAMBER OF COMMERCE AND CVB
ACTUAL OPERATING RESULTS - 1996; 1998; AND 2000

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>PERSONNEL COSTS</td>
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</tr>
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<td>SALARIES &amp; WAGES</td>
<td>1,017,609</td>
<td>713,473</td>
<td>590,636</td>
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<td>PAYROLL TAXES</td>
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<td>EMPLOYEE BENEFITS</td>
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<tr>
<td>TOTAL PERSONNEL COSTS</td>
<td>1,233,089</td>
<td>838,317</td>
<td>590,636</td>
</tr>
<tr>
<td>DIRECT PROMOTION</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>TRAVEL &amp; ENTERTAINMENT</td>
<td>6,419</td>
<td>19,280</td>
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<td>TRADE SHOW PARTICIPITION</td>
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<td>FAM TOURS</td>
<td>57,789</td>
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<td>EVENT HOSTING</td>
<td>659,253</td>
<td>709,550</td>
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<td>MEDIA ADVERTISING</td>
<td>2,485,247</td>
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<td>550,927</td>
<td>88,775</td>
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<td>TELEPHONE</td>
<td>55,260</td>
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<td>27,753</td>
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<td>POSTAGE (PROMO)</td>
<td>169,560</td>
<td>252,066</td>
<td>261,067</td>
</tr>
<tr>
<td>TOTAL DIRECT PROMOTION</td>
<td>4,190,072</td>
<td>3,501,405</td>
<td>4,089,238</td>
</tr>
<tr>
<td>OTHER EXPENSES</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>DUES &amp; SUBSCRIPTIONS</td>
<td>13,478</td>
<td>18,508</td>
<td>1,739</td>
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<td>27,451</td>
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<td>18,526</td>
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<tr>
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<td>14,315</td>
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<td>27,015</td>
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<td>17,828</td>
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<td>14,014</td>
<td>9,602</td>
<td>8,610</td>
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<td>PROFESSIONAL FEES</td>
<td>44,562</td>
<td>43,651</td>
<td>66,362</td>
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<td>27,640</td>
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</tr>
<tr>
<td>RENT</td>
<td>21,000</td>
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<td></td>
</tr>
<tr>
<td>TELEPHONE</td>
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<td>51,967</td>
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<td>POSTAGE</td>
<td>75,403</td>
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<td>23,735</td>
</tr>
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<td>REPAIRS &amp; MAINTENANCE</td>
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<td>8,258</td>
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<tr>
<td>OTHER</td>
<td>580,405</td>
<td>377,793</td>
<td>192,774</td>
</tr>
<tr>
<td>TOTAL OTHER EXPENSES</td>
<td>1,044,186</td>
<td>889,185</td>
<td>366,917</td>
</tr>
</tbody>
</table>

Source: Branson Lakes Area Chamber of Commerce and CVB, and Harrison Price Company.
within the City of Branson. The tax rate (increased in 1997) is four percent of revenues on all but food and beverage receipts, which are levied at one-half percent. The tourism tax is in addition to all other taxes that applied to those businesses at the time of the increase. In 2000, total tourism tax revenues to the City amounted to $9,927,280, down 1.1 percent from a 1999 peak of $10,040,016. The law provides that, after a two percent administrative deduction, 75 percent of tourism tax is devoted to bond amortization and infrastructure improvements and maintenance. The other 25 percent is committed to tourism promotion. In 2000, BLACC/CVB received $2,390,894 from the Tourism Tax Trust Fund.

BLACC/CVB generated an additional $3,652,741 in revenues, representing 60 percent of all funding through its own direct efforts. Advertising in its various publications generated $1.45 million and publication sales added $888,000.

This is the reverse of industry-wide norms in that, overall, public funds represent 82 percent of funding, and exceed 75 percent even for the largest CVBs. Moreover, an average of 75.8 percent of room sales taxes collected are used for CVB funding industry-wide, compared to only 25 percent in the Branson formula. Reality is that definition of funding sources is largely a semantic dance of deception, albeit with a purpose. For example, a room receipts tax generates revenues to government at the local and/or state level, a major portion of which is generally returned to the local travel industry including CVBs as noted above. Even infrastructure expenditures are returned to the travel industry in a location such as Branson, which is dominated by service to travelers and the small resident population serving the visitors. The point is that identifying the source of the funding for a CVB is simple – it comes from the travel industry operators. Most travel industry taxes are returned or used for the benefit of the industry, but HPC estimates that about one-third of collections are siphoned-off for unrelated purposes. Thus, while BLACC/CVB has done an outstanding job of generating most of its $6.5 million total funding in 2000 ($5.2 million in 1998) from non-tax sources, most of that revenue is from the same source – local visitor serving businesses.

Leaders of the Branson area business community have recognized that the total CVB budget and marketing resources are inadequate compared to those of competitive resorts. Therefore, a Tourism Community Enhancement District (TCED) has been proposed under new State legislation that allows imposition of a special sales tax over an area that can include both incorporated and unincorporated areas. In this case, boundaries of the District will probably include most if not all of Taney and Stone Counties. The proposed tax is one percent on retail sales that are not subject to the existing tourism tax, and a 7/8 percent addition to the tax on restaurant sales. BLACC/CVB estimates that the new tax will generate roughly $7.0 million in revenues. This time the allocations are reversed, with 75 percent of collections designated for marketing, advertising and promotion of tourism. The remaining 25 percent will be devoted to programs for local schools, senior citizens, children, and statewide support tourism groups as well as to administrative costs.
Applying the 75 percent BLACC/CVB allocation to an estimated $7.0 million in new tax revenues, yields approximately $5.25 million in new funding for BLACC/CVB annually. This will accrue immediately because it is based on existing business, not a build-up of new attractions. Further tax revenue increases can be expected in all tax categories if the additional funds are used successfully to attract new visitors.

In 2000, BLACC/CVB spent $6.5 million on all of its activities, of which $4.2 million was devoted to direct marketing. On the theory that BLACC/CVB marketing programs are focused on attracting and serving the overnight visitor (individual operators will devote some, if not most, of marketing to the local day visitor), the effort attracted roughly 5.0 million visitors. Thus, the cost of attracting an overnight visitor in 2000 was $1.30, including $0.84 for direct marketing and promotion (costs per visitor day would be less).

According to intercept surveys commissioned by BLACC/CVB, roughly half of overnight visitors in 2000 travel 300 or more miles one-way to visit the area. Data from prior years indicates that 29 to 30 percent of the total travel more than 650 miles, an impressive level of long distance travel. Presumably, BLACC/CVB has learned where and how it can most productively allocate marketing dollars to maximize overnight visitors to the Branson area. An additional $5.25 million in available funds are unlikely to yield visitors at the same rate as has occurred in the past. Diminishing returns will be experienced as smaller DMAs within 300 miles and more distant markets are tapped. Table 6-3 contains a simple calculation of incremental overnight visitors that would be generated at costs of $1.50, $1.75 and $2.00 per person. The range is 3.5 million down to 2.65 million new visitors at $2.00 per person. Adding this number to the roughly 5.0 million recent overnight visitors annually yields a range of 7,625,000 to 8,500,000, or an increase of 50 to 70 percent. These additional visitors will, in turn, spend funds that will generate additional tourism taxes and add to the retail sales tax base. Focusing on the most conservative estimates based on a cost of $2.00 per incremental visitor, an additional $3.3 million in tax revenues could be available to BLACC/CVB, consisting of $0.50 in tourism taxes (derived by: $10 million collected from 5 million visitors = $2.00 per capita x 25% to CVB), and $0.75 from the new TCED sales tax ($5 million+ in sales tax increases based on 5 million visitors = $1.00 per capita x 75% to CVB). Theoretically, these new funds available could be assumed to generate further increases in visitors, spending and tax revenues, at ever increasing cost of capture until further calculation yields insignificant increments. That is the basis of economic impact analysis that results in a multiplier effect for each original dollar spent. HPC believes that a single cycle is appropriate to this analysis. On that basis, total BLACC/CVB funding could reach $15 million or more in the not too distant future.

At even the $11,750,000 budget level available before calculating a multiplier effect, BLACC/CVB budget would be comparable to or exceed those of most direct competitors. A $15 million budget would put Branson on the same footing as all but Orlando and Las Vegas.

**Absence of the New Tourism Community Enhancement District**
Table 6-3

ESTIMATED FUTURE VISITORS AND BLACC/CVB BUDGETS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Overnight Visitors - Rounded</td>
<td>5,000,000</td>
</tr>
<tr>
<td>BLACC/CVB Budget 2000 - Rounded</td>
<td></td>
</tr>
<tr>
<td>Personnel Costs</td>
<td>$1,200,000</td>
</tr>
<tr>
<td>Direct Promotion</td>
<td>4,200,000</td>
</tr>
<tr>
<td>Other</td>
<td>1,050,000</td>
</tr>
<tr>
<td>Total</td>
<td>$6,500,000</td>
</tr>
<tr>
<td>Budget Per Visitor</td>
<td></td>
</tr>
<tr>
<td>Direct Promotion</td>
<td>$0.84</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$1.30</td>
</tr>
<tr>
<td>Added Budget From New Sales Tax</td>
<td>$5,250,000</td>
</tr>
<tr>
<td>Cost Per Visitor:</td>
<td>$1.50 $1.75  $2.00</td>
</tr>
<tr>
<td>Incremental Visitors</td>
<td>3,500,000 3,000,000 2,625,000</td>
</tr>
<tr>
<td>Total Visitors</td>
<td>8,500,000 8,000,000 7,625,000</td>
</tr>
</tbody>
</table>

Est. Incremental Tax Revenues to CVB

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Tax @ 25% of $2.00</td>
<td>$1,750,000 $1,500,000 $1,312,500</td>
</tr>
<tr>
<td>New Sales Tax @ 75% of $1.00</td>
<td>2,625,000 2,250,000 1,968,750</td>
</tr>
<tr>
<td>Sub-total</td>
<td>$4,375,000 $3,750,000 $3,281,250</td>
</tr>
<tr>
<td>Present CVB Budget</td>
<td>$6,500,000 $6,500,000 $6,500,000</td>
</tr>
<tr>
<td>New Sales Tax Added Budget</td>
<td>$5,250,000 $5,250,000 $5,250,000</td>
</tr>
<tr>
<td>Projected Total CVB Budget</td>
<td>$16,125,000 $15,500,000 $15,031,250</td>
</tr>
</tbody>
</table>

Source: BLACC/CVB and Harrison Price Company
If the community does not vote passage of the TCED sales tax addition, plans for long-term growth of the tourism industry in the Branson could be crippled. Civic and business leaders will be obligated to create new tax authorization or other equitable assessment devices to provide collective marketing and promotion budgets for BLACC/CVB if the area is to keep pace with its most direct competitive destinations. The present budget is about half the level of 16 selected destination areas studied here, and tourism tax revenues have declined in recent periods. New sources of marketing revenues should be a maximum priority for Branson leadership.
The indoor music theater industry has been the driving economic force in the Branson/Lakes area in the 1990s. Visitors drawn to music theaters filled hotel rooms and restaurant seats creating an exuberance unparalleled in prior history of the area. However, development of new theaters and supporting infrastructure may have outpaced the long-term demand for show tickets, accommodations and other support facilities as evidenced by a recent slowing of sales and revenues. This section of the report explores the history, present states and potential future of the music theater industry.

Brief History

The Branson area indoor music theater industry started modestly in 1959 when Baldknobbers Hillbilly Jamboree Show opened, followed in 1960 by the Presley family performing in an underground cavern. In 1967 and 1968, those two performing groups moved to the west on Highway 76 and initiated development of what is now referred to as "The Strip", the core of the indoor theater industry in the Branson area today. The 1970s saw some additions, but the real boom in theater development was in the 1980s when new venues were added in almost every year of the decade. Up to that point the emphasis was on "Hillbilly" variety shows and country music. In 1991, the national news media discovered the Branson phenomenon evidenced by the large crowds drawn to the area to see an increasingly broad and recognizable group of performers.

The pace of theater openings quickened from 1992 to 1994, with the result that almost 40 indoor theaters were in place with almost 50,000 seats. An approximation of the chronological development of theater seats in the Branson/Lakes area expressed as a percent of the inventory in place today is as follows:

<table>
<thead>
<tr>
<th>Total Theater Seating</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Built before 1990</td>
<td>26</td>
</tr>
<tr>
<td>Built 1990 to 1992</td>
<td>30</td>
</tr>
<tr>
<td>Built 1993 and 1994</td>
<td>34</td>
</tr>
<tr>
<td>Built 1995 to present</td>
<td>10</td>
</tr>
</tbody>
</table>

As can be seen from the above, the three-year period 1990 to 1992 saw the number of seats more than double. In the following two years (1993 and 1994) an even larger number of seats were added. In the period 1990 to 1994, most of the larger venues were built.
The Branson Theater Industry in 2000

In 2000, there were 40 theaters with 53,239 seats in the Branson area. Of that number, theaters with 5,315 seats were dark most of the year and 47,924 seats were operated throughout the season. Many theaters present two or more shows per day, with the average being about 1.6. The season covers about 8.5 months (255 days), although some shows run longer, some less. A simple mathematical calculation yields an approximate available annual show seating capacity (available tickets) of roughly 19.0 million. A list of theaters in the Branson area is shown in Table 7-1. The data was obtained from the City of Branson, the Branson Lakes Area Chamber of Commerce and CVB, Branson Entertainment Quarterly Magazine, interviews with theater owners-operators and from individual venue websites.

HPC analyzed the theater industry in detail, covering 90 percent of operated seats on which we had complete data from City of Branson Tourism Tax collections. That analysis indicated average utilization industry wide was only about 31 percent. A summary of the data is contained in Table 7-2. The information is divided into three categories: theaters with 2,000 or more seats; venues with 1,000 to 1,999 seats; and smaller theaters with less than 1,000 seats. Seven large theaters averaging 2,501 seats represent 41 percent of total seating and a similar proportion of available tickets, but only 33 percent of tax collections, with average occupancy of 33 percent. Ten mid-sized venues average 1,605 seats, presented 24 percent of total shows, 31 percent of available tickets, and generated 51 percent of tax collections at a high occupancy of 51 percent. The smaller theaters contain only 22 percent of the seats, put on 57 percent of the shows, but they generate only 16 percent of tax collections and have a low occupancy of 20 percent.

Based on $98.9 million in tourism taxes collected in the City of Branson, HPC calculates the tickets sold to be about 4.9 million in the theaters analyzed, which converts to roughly 5.5 million tickets for the total inventory including those not in the City. The average ticket is estimated by HPC at $20.29 based on an average discount of 30 percent from published adult ticket prices, with the larger theaters recording higher prices. The theaters studied averaged revenue of $2,289 per seat, with a higher average recorded by the mid-sized theaters at $3,126 per seat and an average of over $5.0 million revenue per theater. Even these numbers are low for the industry. Clearly, the industry has been over-built since 1994.

Seasonality and Generational Appeal of the Theater Industry in Branson

Table 7-3 shows the percentage of tickets sold on a monthly basis. Ignoring January, February and March when few theaters are operating, the peak theater season is in the fall and winter months of September through December, when arts and crafts and Christmas shows attract older visitors. During summer months, when families dominate the scene, theater ticket sales are low, particularly in the larger venues. Comparing the
### Table 7-1

**LIST OF THEATERS IN BRANSON WITH 2,000 SEATS OR MORE**

<table>
<thead>
<tr>
<th>Theater</th>
<th>Seating</th>
<th>Entertainment Venues (as of 2001)</th>
<th>Adult</th>
<th>Child</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Grand Palace</td>
<td>4,000</td>
<td>Charley Pride</td>
<td>$40.00</td>
<td>$12.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cracklin Rose (04/01-01-09/01/01)</td>
<td>$24.75</td>
<td>$9.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>George Jones</td>
<td>$47.50</td>
<td>$12.50</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Jeff Foxworthy</td>
<td>$50.00</td>
<td>$12.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Loretta Lynn</td>
<td>$47.50</td>
<td>$12.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lorrie Morgan</td>
<td>$40.00</td>
<td>$12.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Neal McCoy</td>
<td>$40.00</td>
<td>$12.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Oak Ridge Boys</td>
<td>$43.00</td>
<td>$12.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Radio City Christmas Spectacular - Rockettes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Grand Mansion</td>
<td>2,000</td>
<td>Venue dark for 2001 (0)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remington</td>
<td>3,000</td>
<td>Cracklin Rose (09/02-01-12/16/01) Dino's</td>
<td>$24.75</td>
<td>$9.50</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dino's Christmas Extravaganza</td>
<td>$27.00</td>
<td>$12.50</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kirby Van Burch Show</td>
<td>$25.00</td>
<td>$15.00 (3-18)</td>
<td>Selected Dates</td>
</tr>
<tr>
<td>Mel Tillis</td>
<td>2,700</td>
<td>John Anderson</td>
<td>$32.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mel Tillis Show</td>
<td>$29.00</td>
<td>$15.00 (4-12)</td>
<td>Selected Dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pam Tillis</td>
<td>$32.00</td>
<td>$15.00 (4-12)</td>
<td>7/17-8/4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Smoke on the Mountain</td>
<td>$22.00</td>
<td>Free</td>
<td></td>
</tr>
<tr>
<td>Welk</td>
<td>2,244</td>
<td>Lawrence Welk Show</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lennon Brothers Breakfast Show, Show Only $19.96/Free</td>
<td>$25.53</td>
<td>$5.50 (6-18)</td>
<td>4/5-12/31</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lennon Brothers Christmas Show, Show Only $22 19/Free</td>
<td>$27.75</td>
<td>$5.50 (6-18)</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Welk Show</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MGH Performing Ctr. (formerly Wayne Newton Theater)</td>
<td>2,230</td>
<td>Buckingham's and the Grass Roots</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Larry Gatlin &amp; The Gatlin Brothers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Incredible Acrobats of China</td>
<td>$25.00</td>
<td>$14.00</td>
<td>5/9-11/30</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Lowe Family of Utah</td>
<td>$20.00</td>
<td>$5.00 (3-18)</td>
<td>4/5-12/15</td>
</tr>
<tr>
<td>Andy Williams</td>
<td>2,234</td>
<td>Andy Williams &amp; Glen Campbell</td>
<td>$38.93</td>
<td>$16.68</td>
<td>9/7-10/27</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Andy Williams Christmas Show</td>
<td>$33.37</td>
<td>$16.68</td>
<td>11/1-12/16</td>
</tr>
<tr>
<td>Country Tonite</td>
<td>2,000</td>
<td>Country Tonite</td>
<td>$25.60</td>
<td>$11.00</td>
<td>3/5-12/15</td>
</tr>
<tr>
<td>SUBTOTAL</td>
<td>20,408</td>
<td></td>
<td>Percent of Total Seats</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Not in Operation</td>
<td>2,000</td>
<td></td>
<td>Percent of This Group</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>
Table 7-1 (Continued)

LIST OF THEATERS IN BRANSON WITH 1,000 TO 1,999 SEATS OR MORE

<table>
<thead>
<tr>
<th>Theater</th>
<th>Seating</th>
<th>Entertainment Venues (as of 2001)</th>
<th>Adult</th>
<th>Child</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shoji Tabuchi</td>
<td>1,990</td>
<td>The Shoji Tabuchi Show</td>
<td>$31.00</td>
<td>$20.00</td>
<td>3/23-12/15</td>
</tr>
<tr>
<td>Presleys'</td>
<td>1,950</td>
<td>Presleys’ Country Jubilee</td>
<td>$23.36</td>
<td>$11.12 (12 &amp; under)</td>
<td>3/16-12/15</td>
</tr>
<tr>
<td>Yellow Ribbon</td>
<td>1,900</td>
<td>Venue dark for 2001 (0)</td>
<td>$29.95</td>
<td>$15.75 (7-12)</td>
<td>4/13-12/15</td>
</tr>
<tr>
<td>The Promise</td>
<td>1,999</td>
<td>The Promise</td>
<td>$29.95</td>
<td>$15.75 (7-12)</td>
<td>11/2-12/15</td>
</tr>
<tr>
<td>Shepherd of the Hills</td>
<td>1,850</td>
<td>Shepherd of the Hills</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baldknobber’s Jamboree</td>
<td>1,700</td>
<td>Baldknobbers Jamboree</td>
<td>$21.50</td>
<td>$11.00 (11 and under)</td>
<td>3/3-12/15</td>
</tr>
<tr>
<td>Osmond Family</td>
<td>1,498</td>
<td>The Doug Gabriel Show</td>
<td>$21.00</td>
<td>$5.00 (16 and under)</td>
<td>3/26-12/31</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Philip Wellford Comedy Show</td>
<td>$32.00</td>
<td>$10.00 (15 &amp; under)</td>
<td>Select</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Osmond Brothers (show only)</td>
<td>$30.59</td>
<td>$11.12</td>
<td>9/12-12/15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Osmonds’Lunch Show*Dinner Show</td>
<td>$53.75</td>
<td>$53.75</td>
<td>TBA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ripley’s Believe It or Not! Live</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tony Orlando Show</td>
<td>$30.59</td>
<td>$11.12</td>
<td>Selected Dates</td>
</tr>
<tr>
<td>Jim Stafford</td>
<td>1,400</td>
<td>Jim Stafford</td>
<td>$27.50</td>
<td>$8.50</td>
<td>2/8-12/31</td>
</tr>
<tr>
<td>Bobby Vinton’s</td>
<td>1,650</td>
<td>Bobby Vinton Today’s Variety</td>
<td>$27.50</td>
<td>$15(12-17), $10(11 &amp; under)</td>
<td>4/18-12/9</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spirit of the Dance</td>
<td>$26.00</td>
<td>$17$10.001&amp;under</td>
<td>4/25-12/15</td>
</tr>
<tr>
<td>Yakov’s American Pav.</td>
<td>1,755</td>
<td>Yakov Smirnoff</td>
<td>$27.00</td>
<td>Free (12 &amp; under)</td>
<td>4/5-12/9</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Charlie Prose</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legends</td>
<td>1,067</td>
<td>Legends in Concert</td>
<td>$25.50</td>
<td>$5.56 (4-16)</td>
<td>2/8-12/31</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Brett Family Singers With Bob Nichols</td>
<td>$19.96</td>
<td>$5.56</td>
<td>4/30-12/15</td>
</tr>
<tr>
<td>Dixie Stampede</td>
<td>1,037</td>
<td>Dixie Stampede Dinner and Show</td>
<td>$39.00</td>
<td>$21.50 (3-11)</td>
<td>3/7-12-31</td>
</tr>
</tbody>
</table>

SUBTOTAL                      | 19,796  | Percent of Total Seats #  37%                                        |
Not in Operation              | 1,500   | Percent of This Group 10%                                             |

7-4
<table>
<thead>
<tr>
<th>Theater</th>
<th>Seating</th>
<th>Entertainment Venues (as of 2001)</th>
<th>Adult</th>
<th>Child</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magical Palace</td>
<td>900</td>
<td>The Bart Rockett Magic Show, Zivagio</td>
<td>$26.00</td>
<td>$16.00</td>
<td>TBA</td>
</tr>
<tr>
<td>Mickey Gilley</td>
<td>980</td>
<td>Jim Owen Morning Show, Mickey Gilley Show</td>
<td>$22.00</td>
<td>$12.00 (12 &amp; under)</td>
<td>Selected Dates</td>
</tr>
<tr>
<td>Dutton Family</td>
<td>901</td>
<td>The Duttons, Daniel O'Donnell, Jennifer, Rhythm of the Dance</td>
<td>$20.00</td>
<td>Free (12 &amp; under)</td>
<td>1/12-2/15</td>
</tr>
<tr>
<td>Americana Theater</td>
<td>878</td>
<td>Starlite Kids</td>
<td>$19.50</td>
<td>Free</td>
<td>4/14-12/15</td>
</tr>
<tr>
<td>Pierce Arrow</td>
<td>817</td>
<td>Pierce Arrow &amp; Paul Harms Show, Too Tall's Outrageously Out West Show</td>
<td>$19.46</td>
<td>$9.00 (4-11)</td>
<td>Every Sunday</td>
</tr>
<tr>
<td>Starlite Theater</td>
<td>880</td>
<td>Lost in the Fifties Show, The Starlite Kids</td>
<td>$26.50</td>
<td>$6.50 (12 &amp; under)</td>
<td>3/1-12/15</td>
</tr>
<tr>
<td>Wild West</td>
<td>715</td>
<td>Venue dark for 2001</td>
<td>$20.00</td>
<td>$6.50 (12 &amp; under)</td>
<td>5/26-12/9</td>
</tr>
<tr>
<td>Thunderbird</td>
<td>700</td>
<td>Venue dark for 2001</td>
<td>$21.00</td>
<td>Free</td>
<td>Year Round</td>
</tr>
<tr>
<td>Moe Bandy</td>
<td>818</td>
<td>The Cowboy Ain't Dead Yet!</td>
<td>$22.00</td>
<td>Free (12 &amp; under)</td>
<td>9/9-9/10/9</td>
</tr>
<tr>
<td>Braschler</td>
<td>700</td>
<td>Barbara Fairchild Show, The Braschler Music Show</td>
<td>$20.00</td>
<td>Free (12 &amp; under)</td>
<td>4/7-12/19</td>
</tr>
<tr>
<td>Showboat Branson Belle</td>
<td>700</td>
<td>The Tony Melendez Show</td>
<td>$20.00</td>
<td>Free (12 &amp; under)</td>
<td>Year Round</td>
</tr>
<tr>
<td>Ain't Misbehavin'</td>
<td>610</td>
<td>Nunsense (At Red Hot &amp; Blue), Dinner Show, $40 for $16.68, Red Hot &amp; Blue - Breakfast Show</td>
<td>$28.92</td>
<td>Free (12 &amp; under)</td>
<td>Year Round</td>
</tr>
<tr>
<td>76 Music Hall</td>
<td>554</td>
<td>Brumley Music Show, Down Home Country, Grand Ladies of Country Music</td>
<td>$20.50</td>
<td>Free</td>
<td>Year Round</td>
</tr>
<tr>
<td>Gold Rush</td>
<td>500</td>
<td>Gold Rush Theatre Featuring VIP Stars</td>
<td>TBA</td>
<td>TBA</td>
<td>TBA</td>
</tr>
<tr>
<td>Branson Music Hall</td>
<td>741</td>
<td>50's At The Hop, Breakfast with the Classics</td>
<td>$24.75</td>
<td>$9.45 ages 6-11</td>
<td>1/18-12/30</td>
</tr>
<tr>
<td>Buck Trent</td>
<td>416</td>
<td>Buck Trent Breakfast Show</td>
<td>$22.50</td>
<td>Free</td>
<td>4/17-12/9</td>
</tr>
<tr>
<td>Owen's Theater</td>
<td>248</td>
<td>Breakfast with Norman Rockwell, Elvis and the Super Stars</td>
<td>$22.50</td>
<td>$5.56 (6-16)</td>
<td>2/9-12/31</td>
</tr>
<tr>
<td>Waltzing Waters</td>
<td>250</td>
<td>Frederick in Concert</td>
<td>$12.00</td>
<td>$6.00 (3-11)</td>
<td>1/23-12/31</td>
</tr>
<tr>
<td>Hughes Brothers</td>
<td>205</td>
<td>Waltzing Waters Fountain Show, The Hughes Brothers Morning Show</td>
<td>$28.00</td>
<td>$6.00 (12 &amp; under)</td>
<td>2/3-12/31</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Platters - Dinner Show, The Platters - Lunch Show</td>
<td>$30.00</td>
<td>$8.00 (12 &amp; under)</td>
<td>1/27-12/15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Platters - Show Only</td>
<td>$22.00</td>
<td>Free (12 &amp; under)</td>
<td>1/27-12/15</td>
</tr>
</tbody>
</table>

(This Group Continued on Next Page)
Table 7-1 (Continued)

LIST OF THEATERS IN BRANSON WITH 1,000 SEATS OR LESS (Continued)

<table>
<thead>
<tr>
<th>IMAX</th>
<th>Total Seating Capacity</th>
<th>Subtotal</th>
<th>Percent of Total Seats</th>
<th>Percent of This Group</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remember When</td>
<td>532</td>
<td>13,035</td>
<td>24%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Mike Radford Show</td>
<td>1415</td>
<td>1415</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tony Melendez Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jimmy Rogers Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mike Radford Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tony Melendez Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

SUMMARY OF SEATING CAPACITY IN BRANSON INDOOR THEATERS

SUMMARY:

<table>
<thead>
<tr>
<th>Total Seating Capacity</th>
<th>Percent of Total Seats</th>
<th>Theaters not on the list</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Operation</td>
<td>90%</td>
<td>Desperado Theater 633</td>
</tr>
<tr>
<td>Not in Operation</td>
<td>10%</td>
<td>Dogwood Inn Theater 150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Golden Corral 496</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kirby VanBurch Theater 2100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kirkwood Theater 626</td>
</tr>
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</table>

Source: City of Branson and Harrison Price Company
Table 7-2
OPERATION SUMMARY OF THEATER VENUES IN BRANSON

<table>
<thead>
<tr>
<th>Seating</th>
<th>2000+</th>
<th>1999 -1000</th>
<th>1900-</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Theaters</td>
<td>7</td>
<td>10</td>
<td>15</td>
<td>32</td>
</tr>
<tr>
<td># of Seats</td>
<td>17,508</td>
<td>16,046</td>
<td>5,649</td>
<td>43,203</td>
</tr>
<tr>
<td>Distribution</td>
<td>41%</td>
<td>37%</td>
<td>22%</td>
<td>100%</td>
</tr>
<tr>
<td>Avg Seats/Theater</td>
<td>2,501</td>
<td>1,605</td>
<td>543</td>
<td>1,350</td>
</tr>
<tr>
<td># of Shows</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>-</td>
<td>-</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Feb</td>
<td>-</td>
<td>-</td>
<td>68</td>
<td>103</td>
</tr>
<tr>
<td>Mar</td>
<td>47</td>
<td>121</td>
<td>239</td>
<td>427</td>
</tr>
<tr>
<td>Apr</td>
<td>176</td>
<td>222</td>
<td>605</td>
<td>1,003</td>
</tr>
<tr>
<td>May</td>
<td>310</td>
<td>356</td>
<td>644</td>
<td>1,523</td>
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<tr>
<td>Jun</td>
<td>304</td>
<td>359</td>
<td>879</td>
<td>1,542</td>
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<tr>
<td>Jul</td>
<td>329</td>
<td>253</td>
<td>767</td>
<td>1,479</td>
</tr>
<tr>
<td>Aug</td>
<td>293</td>
<td>343</td>
<td>783</td>
<td>1,419</td>
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<tr>
<td>Sep</td>
<td>264</td>
<td>360</td>
<td>802</td>
<td>1,444</td>
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<tr>
<td>Oct</td>
<td>315</td>
<td>293</td>
<td>490</td>
<td>1,598</td>
</tr>
<tr>
<td>Nov</td>
<td>321</td>
<td>406</td>
<td>917</td>
<td>1,644</td>
</tr>
<tr>
<td>Dec</td>
<td>147</td>
<td>208</td>
<td>651</td>
<td>929</td>
</tr>
<tr>
<td>Total</td>
<td>2,506</td>
<td>3,189</td>
<td>7,434</td>
<td>13,129</td>
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<tr>
<td>Distribution</td>
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<td>24%</td>
<td>57%</td>
<td>100%</td>
</tr>
<tr>
<td>Avg Shows/Theater</td>
<td>306</td>
<td>319</td>
<td>496</td>
<td>410</td>
</tr>
<tr>
<td># Available Tickets (000)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>-</td>
<td>-</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Feb</td>
<td>-</td>
<td>-</td>
<td>45</td>
<td>96</td>
</tr>
<tr>
<td>Mar</td>
<td>96</td>
<td>171</td>
<td>176</td>
<td>443</td>
</tr>
<tr>
<td>Apr</td>
<td>455</td>
<td>345</td>
<td>362</td>
<td>1,162</td>
</tr>
<tr>
<td>May</td>
<td>777</td>
<td>591</td>
<td>536</td>
<td>1,894</td>
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<tr>
<td>Jun</td>
<td>758</td>
<td>556</td>
<td>551</td>
<td>1,867</td>
</tr>
<tr>
<td>Jul</td>
<td>817</td>
<td>526</td>
<td>500</td>
<td>1,842</td>
</tr>
<tr>
<td>Aug</td>
<td>740</td>
<td>516</td>
<td>486</td>
<td>1,745</td>
</tr>
<tr>
<td>Sep</td>
<td>657</td>
<td>559</td>
<td>513</td>
<td>1,729</td>
</tr>
<tr>
<td>Oct</td>
<td>771</td>
<td>617</td>
<td>558</td>
<td>1,546</td>
</tr>
<tr>
<td>Nov</td>
<td>762</td>
<td>645</td>
<td>594</td>
<td>2,021</td>
</tr>
<tr>
<td>Dec</td>
<td>351</td>
<td>353</td>
<td>324</td>
<td>1,028</td>
</tr>
<tr>
<td>Total</td>
<td>4,205</td>
<td>4,913</td>
<td>4,663</td>
<td>15,641</td>
</tr>
<tr>
<td>Distribution</td>
<td>40%</td>
<td>31%</td>
<td>30%</td>
<td>101%</td>
</tr>
<tr>
<td>Avg Avail. Tickets/Theater</td>
<td>886</td>
<td>431</td>
<td>311</td>
<td>489</td>
</tr>
<tr>
<td>Tax Collections ($)</td>
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</tr>
<tr>
<td>Jan</td>
<td>2,697</td>
<td>4,804</td>
<td>7,334</td>
<td>15,232</td>
</tr>
<tr>
<td>Feb</td>
<td>11,406</td>
<td>9,525</td>
<td>11,670</td>
<td>32,681</td>
</tr>
<tr>
<td>Mar</td>
<td>16,912</td>
<td>69,419</td>
<td>33,167</td>
<td>118,399</td>
</tr>
<tr>
<td>Apr</td>
<td>67,625</td>
<td>133,630</td>
<td>61,291</td>
<td>292,546</td>
</tr>
<tr>
<td>May</td>
<td>114,143</td>
<td>224,314</td>
<td>54,956</td>
<td>390,413</td>
</tr>
<tr>
<td>Jun</td>
<td>155,221</td>
<td>206,809</td>
<td>58,673</td>
<td>420,702</td>
</tr>
<tr>
<td>Jul</td>
<td>95,560</td>
<td>175,464</td>
<td>77,134</td>
<td>348,159</td>
</tr>
<tr>
<td>Aug</td>
<td>74,164</td>
<td>148,749</td>
<td>54,777</td>
<td>274,710</td>
</tr>
<tr>
<td>Sep</td>
<td>150,748</td>
<td>232,954</td>
<td>57,136</td>
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<tr>
<td>Oct</td>
<td>199,772</td>
<td>254,560</td>
<td>69,320</td>
<td>563,652</td>
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<tr>
<td>Nov</td>
<td>338,543</td>
<td>351,036</td>
<td>90,133</td>
<td>779,714</td>
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<td>Dec</td>
<td>80,519</td>
<td>158,209</td>
<td>53,406</td>
<td>292,214</td>
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<tr>
<td>Total</td>
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<td>2,006,515</td>
<td>629,277</td>
<td>3,955,292</td>
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<tr>
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<td>51%</td>
<td>46%</td>
<td>100%</td>
</tr>
<tr>
<td>Tickets Sold(000)</td>
<td></td>
<td></td>
<td></td>
<td>4,873</td>
</tr>
<tr>
<td>Jan</td>
<td>1,465</td>
<td>2,479</td>
<td>929</td>
<td>4,873</td>
</tr>
<tr>
<td>Feb</td>
<td></td>
<td>20,24</td>
<td>10,93</td>
<td>20,29</td>
</tr>
<tr>
<td>Mar</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Apr</td>
<td></td>
<td>30%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>May</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Jun</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Jul</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Aug</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Sep</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Oct</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Nov</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Dec</td>
<td></td>
<td>20%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Revenue from Ticket Sales ($)</td>
<td>32,987,496</td>
<td>50,162,874</td>
<td>15,731,932</td>
<td>98,882,293</td>
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<tr>
<td>Avg Revenue/Theater ($)</td>
<td>4,712,496</td>
<td>5,016,287</td>
<td>1,048,798</td>
<td>5,860,072</td>
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<tr>
<td>Avg Revenue/Theater ($)</td>
<td>1,984</td>
<td>3,126</td>
<td>1,630</td>
<td>2,269</td>
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</tbody>
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Source: City of Branson, Branson Lakes Area Chamber of Commerce and CVB
Branson Entertainment Quarterly Magazine, and Harrison Price Company
Table 7-3
MONTHLY PERCENT OF AVAILABLE TICKETS SOLD

<table>
<thead>
<tr>
<th>Theater Seats</th>
<th>Number of Seats</th>
<th>1999</th>
<th>2000+</th>
<th>1000</th>
<th>1000-</th>
<th>Total</th>
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<tbody>
<tr>
<td>Tickets Sold (000)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>9</td>
<td>14</td>
<td>27</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb</td>
<td>13</td>
<td>90</td>
<td>46</td>
<td>157</td>
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<td></td>
</tr>
<tr>
<td>Mar</td>
<td>164</td>
<td>83</td>
<td>337</td>
<td></td>
<td></td>
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</tr>
<tr>
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<td>131</td>
<td>88</td>
<td>490</td>
<td></td>
<td></td>
<td></td>
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<tr>
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<td>112</td>
<td>117</td>
<td>448</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun</td>
<td>184</td>
<td>82</td>
<td>558</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul</td>
<td>226</td>
<td>106</td>
<td>695</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug</td>
<td>354</td>
<td>135</td>
<td>913</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sep</td>
<td>91</td>
<td>80</td>
<td>374</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,465</td>
<td>2,479</td>
<td>929</td>
<td>4,873</td>
<td></td>
<td></td>
</tr>
<tr>
<td># Available Tickets (000)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>17</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb</td>
<td>45</td>
<td>86</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar</td>
<td>176</td>
<td>443</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr</td>
<td>362</td>
<td>1,162</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>536</td>
<td>1,894</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun</td>
<td>551</td>
<td>1,867</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul</td>
<td>500</td>
<td>1,842</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug</td>
<td>486</td>
<td>1,745</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sep</td>
<td>513</td>
<td>1,729</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct</td>
<td>558</td>
<td>1,946</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov</td>
<td>594</td>
<td>2,021</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Dec</td>
<td>324</td>
<td>1,028</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Total</td>
<td>6,205</td>
<td>4,913</td>
<td>4,663</td>
<td>15,641</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of Tickets Sold</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan</td>
<td>53%</td>
<td>53%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb</td>
<td>31%</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar</td>
<td>26%</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr</td>
<td>25%</td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>16%</td>
<td>28%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun</td>
<td>16%</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul</td>
<td>23%</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug</td>
<td>17%</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sep</td>
<td>17%</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct</td>
<td>19%</td>
<td>36%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov</td>
<td>23%</td>
<td>45%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dec</td>
<td>25%</td>
<td>36%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>20%</td>
<td>31%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: City of Branson, Tourism Tax Collections, and Harrison Price Company.
number of theater tickets sold monthly to the number of overnight visitors as shown in Table 7-4 provides further evidence of the popularity of the Christmas shows for the older visitors and lack of response by families visiting in summer.

Many summer visitors are spread out along the lakeshores and simply are not drawn by the music shows as now constituted. It should be understood that these numbers do not imply that each visitor to the area goes to a show, although the ratio is one to one. Instead, some of the visitors go to several shows during a stay of two or more nights. Some tour packagers offer three or more shows coupled with lodging and other activities, often featuring more than one show/activity per day. On the other hand, many visitors do not take in any shows.

These factors are supported by results of intercept surveys and estimates of overnight tourism published by BLACC/CVB presented elsewhere in this report. Those statistical analyses indicate that the Baby Boomers and GenXers are not responding to the music shows in the same numbers as had the Mature and Forgotten generations in the early and mid-1990s. Moreover, younger families traveling to the area in the summer months do not respond to most of the variety shows and older entertainers, even though the shows claim to tailor summer performances to a family audience. The lack of response has led many of the top shows still performing in Branson to curtail summer performances and either bring in guest performers or let their theaters go dark in summer months. Even in the peak years there were always performers moving from theater to theater or coming and going from time to time. But the bigger names continue to dwindle.

In Table 7-5 we have reproduced data from BLACC/CVB intercept studies (interviews with area visitors conducted by Montgomery Consulting) that attempt to define the Branson Lakes area visitor. As a precaution against taking the data too seriously, we suggest that the reader focus on the reported number of shows seen by each visitor, which is 3.93 shows on average. In itself, that is an impossible number. It suggests that almost 19 million show tickets are sold in the Branson area annually to 4.8 million overnight visitors alone, and day visitors buying theater tickets would be on top of that. That number exceeds total tickets available. Even more questionable, the idea suggests that Baby Boomers see 3.5 shows and GenXers see more than three shows each. An equally unjustified statistic is a reported length of stay of 4.0 nights, indicating about 20 million overnight stays in the 19,000 hotel and motel rooms in the area, extrapolating to about 27 million total visitor days including 30 percent not using commercial lodging. Occupancies in commercial accommodations would be in excess of 70 percent, a figure much higher than the actual rate. Obviously, the rest of the data should be interpreted with extreme caution because the survey has extreme built-in biases. Even the data on average age of visitors and first time visitor counts that have been the subject of agony among local leaders is subject to serious question.

The remainder of the data contains some generalities about the differences in generational preferences/activities that are predictable, but the reader should interpret this data based on his/her own judgment. For HPCs purposes the extensive data
<table>
<thead>
<tr>
<th>Month</th>
<th>Tickets Sold (000)</th>
<th>Number of Overnight Visitors (000)</th>
<th>Tickets Sold as % of Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>19</td>
<td>101</td>
<td>19%</td>
</tr>
<tr>
<td>Feb</td>
<td>37</td>
<td>127</td>
<td>29%</td>
</tr>
<tr>
<td>Mar</td>
<td>157</td>
<td>240</td>
<td>65%</td>
</tr>
<tr>
<td>Apr</td>
<td>337</td>
<td>362</td>
<td>93%</td>
</tr>
<tr>
<td>May</td>
<td>490</td>
<td>482</td>
<td>102%</td>
</tr>
<tr>
<td>Jun</td>
<td>510</td>
<td>516</td>
<td>99%</td>
</tr>
<tr>
<td>Jul</td>
<td>448</td>
<td>558</td>
<td>80%</td>
</tr>
<tr>
<td>Aug</td>
<td>354</td>
<td>432</td>
<td>82%</td>
</tr>
<tr>
<td>Sep</td>
<td>558</td>
<td>490</td>
<td>114%</td>
</tr>
<tr>
<td>Oct</td>
<td>695</td>
<td>583</td>
<td>119%</td>
</tr>
<tr>
<td>Nov</td>
<td>913</td>
<td>608</td>
<td>150%</td>
</tr>
<tr>
<td>Dec</td>
<td>374</td>
<td>316</td>
<td>118%</td>
</tr>
<tr>
<td>Total</td>
<td>4,873</td>
<td>4,815</td>
<td>101%</td>
</tr>
</tbody>
</table>

Source: City of Branson, Branson Lakes Area Chamber of Commerce and CVB, and Harrison Price Company.
Table 7-5
ANALYSIS OF BRANSON VISITORS BY GENERATIONAL COHORT, 2000

<table>
<thead>
<tr>
<th></th>
<th>Matures</th>
<th>Boomer</th>
<th>Gen X</th>
<th>All Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Seasons</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winter</td>
<td>4.3%</td>
<td>6.4%</td>
<td>6.9%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Spring</td>
<td>17.3%</td>
<td>18.2%</td>
<td>15.4%</td>
<td>17.4%</td>
</tr>
<tr>
<td>Summer</td>
<td>23.9%</td>
<td>35.8%</td>
<td>44.6%</td>
<td>29.2%</td>
</tr>
<tr>
<td>Fall</td>
<td>22.5%</td>
<td>15.4%</td>
<td>11.4%</td>
<td>19.4%</td>
</tr>
<tr>
<td>Christmas</td>
<td>22.7%</td>
<td>14.9%</td>
<td>15.4%</td>
<td>15.7%</td>
</tr>
<tr>
<td><strong>Summary Activities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>90.0%</td>
<td>86.2%</td>
<td>78.0%</td>
<td>87.0%</td>
</tr>
<tr>
<td>Theaters</td>
<td>93.8%</td>
<td>64.2%</td>
<td>71.4%</td>
<td>89.2%</td>
</tr>
<tr>
<td>Theme Parks, etc</td>
<td>41.1%</td>
<td>57.9%</td>
<td>67.2%</td>
<td>48.5%</td>
</tr>
<tr>
<td>Historic Sites</td>
<td>60.3%</td>
<td>57.9%</td>
<td>45.6%</td>
<td>56.4%</td>
</tr>
<tr>
<td>Water Activities</td>
<td>28.3%</td>
<td>27.0%</td>
<td>15.4%</td>
<td>26.9%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>17.1%</td>
<td>18.1%</td>
<td>16.6%</td>
<td>17.4%</td>
</tr>
<tr>
<td>Excursions</td>
<td>17.0%</td>
<td>29.5%</td>
<td>34.4%</td>
<td>22.3%</td>
</tr>
<tr>
<td>Museums</td>
<td>7.8%</td>
<td>13.0%</td>
<td>18.7%</td>
<td>10.3%</td>
</tr>
<tr>
<td><strong>No. of Shows</strong></td>
<td>4.20</td>
<td>3.54</td>
<td>3.08</td>
<td>3.93</td>
</tr>
<tr>
<td><strong>Length of Stay (nights)</strong></td>
<td>4.20</td>
<td>3.60</td>
<td>3.40</td>
<td>4.00</td>
</tr>
<tr>
<td><strong>Accommodations</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel/Motel</td>
<td>70.4%</td>
<td>72.6%</td>
<td>69.2%</td>
<td>71.3%</td>
</tr>
<tr>
<td>RV Park/Campingground</td>
<td>9.3%</td>
<td>3.2%</td>
<td>3.1%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Resort</td>
<td>5.2%</td>
<td>7.6%</td>
<td>2.6%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Condo</td>
<td>4.1%</td>
<td>4.3%</td>
<td>4.7%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Time Share</td>
<td>8.2%</td>
<td>7.5%</td>
<td>6.3%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Friend/Family</td>
<td>1.0%</td>
<td>3.9%</td>
<td>12.5%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>0.2%</td>
<td>0.5%</td>
<td>1.0%</td>
<td>0.4%</td>
</tr>
<tr>
<td><strong>Party Composition</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Families</td>
<td>8.4%</td>
<td>34.0%</td>
<td>54.4%</td>
<td>15.9%</td>
</tr>
<tr>
<td>Adults</td>
<td>28.4%</td>
<td>53.7%</td>
<td>39.4%</td>
<td>37.4%</td>
</tr>
<tr>
<td>Seniors</td>
<td>65.2%</td>
<td>12.3%</td>
<td>6.2%</td>
<td>43.7%</td>
</tr>
<tr>
<td><strong>Visitor Composition</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Families</td>
<td>11.5%</td>
<td>48.8%</td>
<td>68.8%</td>
<td>32.5%</td>
</tr>
<tr>
<td>Adults</td>
<td>27.6%</td>
<td>41.9%</td>
<td>27.1%</td>
<td>32.8%</td>
</tr>
<tr>
<td>Seniors</td>
<td>60.9%</td>
<td>12.2%</td>
<td>4.1%</td>
<td>36.8%</td>
</tr>
<tr>
<td><strong>Mode of Travel</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Vehicle</td>
<td>77.9%</td>
<td>91.6%</td>
<td>65.9%</td>
<td>83.3%</td>
</tr>
<tr>
<td>RV / Camper</td>
<td>8.7%</td>
<td>2.7%</td>
<td>1.7%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Tour Bus</td>
<td>10.2%</td>
<td>2.9%</td>
<td>0.8%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Others</td>
<td>3.2%</td>
<td>2.6%</td>
<td>1.6%</td>
<td>3.2%</td>
</tr>
<tr>
<td><strong>Motivation of Visit</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ent/Shows</td>
<td>46.8%</td>
<td>30.0%</td>
<td>23.7%</td>
<td>39.7%</td>
</tr>
<tr>
<td>Vacation</td>
<td>41.3%</td>
<td>53.7%</td>
<td>58.1%</td>
<td>46.5%</td>
</tr>
<tr>
<td>Branson Resl</td>
<td>7.4%</td>
<td>7.2%</td>
<td>5.6%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Group/Organization</td>
<td>5.8%</td>
<td>4.8%</td>
<td>2.5%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Outdoor/Scenery</td>
<td>9.6%</td>
<td>7.3%</td>
<td>7.1%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Shopping</td>
<td>3.7%</td>
<td>3.6%</td>
<td>7.1%</td>
<td>4.6%</td>
</tr>
<tr>
<td><strong>Amount Spent</strong></td>
<td>$856.30</td>
<td>$771.00</td>
<td>$682.80</td>
<td>$806.30</td>
</tr>
<tr>
<td>Per Person</td>
<td>329.35</td>
<td>233.54</td>
<td>160.80</td>
<td>278.03</td>
</tr>
<tr>
<td>PPWPG</td>
<td>78.42</td>
<td>91.48</td>
<td>47.29</td>
<td>69.51</td>
</tr>
<tr>
<td><strong>Distance Traveled</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-100 miles</td>
<td>11.1%</td>
<td>18.5%</td>
<td>26.1%</td>
<td>14.7%</td>
</tr>
<tr>
<td>101-300 miles</td>
<td>31.3%</td>
<td>36.3%</td>
<td>39.4%</td>
<td>33.5%</td>
</tr>
<tr>
<td>301+ miles</td>
<td>57.4%</td>
<td>43.9%</td>
<td>33.6%</td>
<td>51.3%</td>
</tr>
<tr>
<td><strong>Avg Age</strong></td>
<td>66.3</td>
<td>46.4</td>
<td>28.4</td>
<td>57.1</td>
</tr>
<tr>
<td><strong>Avg Income</strong></td>
<td>$50,900</td>
<td>$57,500</td>
<td>$43,200</td>
<td>$52,400</td>
</tr>
</tbody>
</table>

Source: BLACC/OVB Research Committee
purporting to define Branson is nearly useless even in the context of trends because it is so influenced by built-in biases. Therefore, our analysis is founded on actual data from the tourism tax, which should be biased only by some possible under-reporting.

**Competitive Factors**

**Gambling Casinos**

Increasing development of gambling facilities in diverse locations around the country presents stiff competition to Branson theaters. Some of the bigger names playing Branson on a more or less permanent basis are being enticed away to play at the casinos during slow periods in Branson. Casinos can subsidize performers if the show is able to draw more customers to the gaming tables and slots, and they pay top dollar for the best shows. The biggest and boldest of the gaming destinations is Las Vegas, the Granddaddy of them all. It now has 120,000 rooms, 34 million annual visitors and 63 casinos, many of which have large and elaborate showrooms that feature top acts on a rotating or permanent basis. Most of the recently developed hotel/casinos contain thousands of rooms. Most Las Vegas visitors stay overnight because the area is so distant from major population centers. There are smaller casinos elsewhere in the State of Nevada such as Reno and Laughlin, which are also tourism destinations.

Nevada was the only state to allow casino gaming until the first hotel/casino opened in Atlantic City in 1978. Atlantic City sought to stem the loss of its position as a world renowned tourist destination by introducing gaming. There are now 13 large hotel/casinos in Atlantic City and two new ones are under construction. Thirty-three states now have some form of casino gaming, some limited to Indian lands, others allowing more broadly based gaming.

In November of 1992, voters in Missouri approved riverboat gambling, becoming the fifth state in the country to do so. Nine casinos currently operate in Missouri, mostly clustered in the St. Louis and Kansas City areas. None are located in southwest Missouri. There is no limitation on the number of casino licenses that can ultimately be issued. Although they are called riverboats, they are mostly large barges that must be permanently tied down. A limit of $500 in losses per person is imposed in any two-hour period, and elaborate system of tracking chip purchases is in place. Live theater entertainment is not a big offering at Missouri casinos although some entertainment is offered.

The most direct gaming centered competition for the Branson theater industry is from Mississippi, where riverboat gaming was approved in 1990 and the first casino opened in August 1992. There are now 31 casinos operating in Mississippi, more than half of which have major entertainment venues. Tunica on the Mississippi River in the northwest section of the state near the Arkansas and Tennessee borders is the most convenient concentration, 300 miles from Branson. People residing 100 to 200 miles from Branson would be most affected by the competitive draw of Tunica showrooms.
A majority of entertainers and business people interviewed during field trips and telephone conversations expressed opposition to casinos in Branson. Some claimed to be ambivalent about the issue. HPC also does not recommend gaming as a savior for the economy because the local off-site impact of gaming expenditures is generally limited to some relatively low-paying jobs and added government revenues. Gaming should be considered only if there is a danger of not being able to meet obligations such as covering bond debt.

Other Destinations – Pigeon Forge and Myrtle Beach Areas

The Tennessee tourism towns of Pigeon Forge and Sevierville attempted to develop a music/theater industry market in the mid-1990s in the wake of the apparent success in Branson. As listed in Table 7-6, there are seven theaters with 7,250 seats operating in Pigeon Forge and another 2,750 seats in two theaters in Sevierville, for a total of 10,000 seats now in operation. (Gatlinburg has a couple of small theaters that are not significant to this analysis). There are four other theaters with 5,575 seats that were in operation but are now closed. Following is an annual summary of theater revenues in Pigeon Forge from 1996 to 2000:

<table>
<thead>
<tr>
<th>Year</th>
<th>$ millions</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>22.2</td>
<td>NA</td>
</tr>
<tr>
<td>1997</td>
<td>28.4</td>
<td>27.9</td>
</tr>
<tr>
<td>1998</td>
<td>32.9</td>
<td>15.8</td>
</tr>
<tr>
<td>1999</td>
<td>34.0</td>
<td>3.2</td>
</tr>
<tr>
<td>2000</td>
<td>35.3</td>
<td>3.8</td>
</tr>
</tbody>
</table>

In its report Business Statistics 2000, the Pigeon Forge Department of Tourism notes that the almost four percent increase in theater revenue in 2000 over 1999 was unusual because it resulted despite the closing of 3 theaters the prior year, thus representing greater revenue per theater. The rate of increase is clearly declining in the Pigeon Forge area, and the large percentage of closed theater seating has to cause concern. The total increase in the five-year period 1996 to 2000 was 59 percent.

Comparatively, City of Branson theater revenues were $98.8 million in 1996, grew to $107.9 million in 1999 and then declined to $99.4 million in 2000. Thus far this year,
Table 7-6

OPERATION SUMMARY OF THEATER VENUES IN PIGEON FORGE AND SEVIERVILLE, TN

<table>
<thead>
<tr>
<th>Venues</th>
<th>Number of Seats</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pigeon Forge:</strong></td>
<td></td>
</tr>
<tr>
<td>Comedy Barn Theater</td>
<td>1,000</td>
</tr>
<tr>
<td>Country Tonite Theatre</td>
<td>1,500</td>
</tr>
<tr>
<td>Dixie Stampede</td>
<td>1,100</td>
</tr>
<tr>
<td>Louise Mandrell Theater</td>
<td>1,400</td>
</tr>
<tr>
<td>Memories Theater</td>
<td>900</td>
</tr>
<tr>
<td>Ole Smoky Hoedown</td>
<td>450</td>
</tr>
<tr>
<td>Smoky Mountain Jubilee</td>
<td>900</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>7,250</td>
</tr>
<tr>
<td><strong>Sevierville:</strong></td>
<td></td>
</tr>
<tr>
<td>Governor's Palace Theater</td>
<td>1,750</td>
</tr>
<tr>
<td>Southern Nights Music Theater</td>
<td>1,000</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>2,750</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>10,000</td>
</tr>
</tbody>
</table>

**Summary**

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Available Tickets (@1.6 shows per day, 255 days per year)</td>
<td>4,080,000</td>
</tr>
<tr>
<td>Avg. Ticket</td>
<td>$ 22.00</td>
</tr>
<tr>
<td>Avg. Occupancy</td>
<td>39%</td>
</tr>
<tr>
<td>Gross Business Revenue (Y2000)</td>
<td>$35,006,400</td>
</tr>
<tr>
<td>Tickets Sold</td>
<td>1,591,200</td>
</tr>
</tbody>
</table>

*Note: Theaters below were closed in Y2001.*

**Pigeon Forge:**

- Eagle Mountain Theater: 1,150
- Glasgow Comedy Theater: 650
- Music Mansion Theater: 2,000

**Sevierville:**

- Lee Greenwood Theater: 1,776

**Total**: 5,576

Source: Pigeon Forge Department of Tourism and Harrison Price Company.
theater revenues are reportedly down significantly. Nonetheless, the revenues in Branson are almost three times that of Pigeon Forge.

There are substantial differences in the seasonality of tourism in Branson and Sevier County, TN. As shown in Figure 6-1, the Pigeon Forge area has a more typical summer peak in attendance, with a high of 14 percent in July and secondary spikes in May and October at about 12 percent of the annual total. Branson ticket revenue, on the other hand, peaks at almost 20 percent in November after a build-up in September and October.

As shown in Table 7-7, Myrtle Beach also experienced a boom in theater development in the mid-1990s and now has 8 operating theaters with 13,210 seats operating. Direct information on theater ticket sales revenue is not available because the South Carolina tax agency does not separate data on sub-categories that would allow definitive calculations. Therefore, HPC has used a model based on recent Branson experience to create estimates of ticket sales and revenues for the Myrtle Beach area, which includes Horry and Georgetown Counties. On that basis, Myrtle Beach theater revenues are estimated at $33.4 million, again about one-third of Branson volume and roughly equal to the Pigeon Forge area.

As a general check of reasonability, admissions tax revenues of $9.9 million in FY 2000-2001 convert to about $198 million in gross admissions revenues. Roughly half of these revenues are represented by greens fees charged at the over 100 golf courses in the area. Theaters would therefore represent about one-third of non-golf revenues, a number that seems reasonable, but is not provable without more data from the state. It is also worth noting that 1996-97 admissions taxes were $8.6 million and increased to $9.9 million the following year. Since then they have been flat.

**Theater Operating Models**

In the exuberance of Branson becoming a leading destination resort, many large theaters were built that are operating at a low level of utilization and offering multiple daily shows in an attempt to cover costs and make an adequate return on investment. HPC has created two models of theater operations to illustrate the economic fundamentals of the industry, as shown in Table 7-8. The models contain estimates for theaters with 1,000 and 2,000 seats operating at utilization of 20 percent to 50 percent, a range that is consistent with actual performance of Branson area theaters. Clearly, utilization of 20 percent is a marginal operation lacking adequate return on investment, let alone reward for entertainment value/talent. At 40 percent utilization, the rewards are commensurate with the value of performances presented.

It should be noted that these illustrative financial analyses presume that a high level of utilization is possible at larger seating capacity of 2,000 seats or more. In fact, as presented previously, theaters with 2,000 seats or more had a dismal occupancy of only 24 percent, compared to 50 percent for venues with 1,000 to 1,999 seats. A large
Figure 7-1

MONTHLY DISTRIBUTION OF THEATER TICKET REVENUES IN 2000, BRANSON AND PIGEON FORGE

Percentage of Annual Attendance

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>3.4%</td>
<td>15.1%</td>
<td>20.0%</td>
<td>22.6%</td>
</tr>
</tbody>
</table>

Branson

Pigeon Forge
Table 7-7
OPERATION SUMMARY OF THEATER VENUES
IN MYRTLE BEACH, SC

<table>
<thead>
<tr>
<th>Venues</th>
<th>Number of Seats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama Theatre</td>
<td>2,000</td>
</tr>
<tr>
<td>Carolina Opry</td>
<td>2,200</td>
</tr>
<tr>
<td>Crook &amp; Chase Theater</td>
<td>2,000</td>
</tr>
<tr>
<td>Dixie Stampede</td>
<td>1,000</td>
</tr>
<tr>
<td>Legends In Concert</td>
<td>1,000</td>
</tr>
<tr>
<td>Medieval Times</td>
<td>1,400</td>
</tr>
<tr>
<td>Palace Theater</td>
<td>2,700</td>
</tr>
<tr>
<td>Savoy Theatre/Ice Castle Theater</td>
<td>910</td>
</tr>
<tr>
<td>Total</td>
<td>13,210</td>
</tr>
</tbody>
</table>

Total Available Tickets (@1.6 shows per day, 255 days per year) 5,389,680
Avg. Ticket $20.00
Avg. Occupancy 31%
Gross Business Revenue (Y2000) $33,416,016
Tickets Sold 1,670,801

Note: NMB Celebrity Theater (950 seats) is closed.
House of Blues hosts intermittent concerts in its 680 seat Music Hall, which can hold 2,200 on a standing room only basis.

Source: Myrtle Beach Chamber and CVB and Harrison Price Company.
Table 7-8

ESTIMATED OPERATING RESULTS FOR THEATERS WITH 1,000 AND 2,000 SEATS

<table>
<thead>
<tr>
<th>Seats</th>
<th>1,000</th>
<th>2,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Oper. Days</td>
<td>255</td>
<td>255</td>
</tr>
<tr>
<td>Shows</td>
<td>360</td>
<td>360</td>
</tr>
<tr>
<td>Shows Per Day</td>
<td>3/2</td>
<td>3/2</td>
</tr>
<tr>
<td>Seats Avail.</td>
<td>360,000</td>
<td>720,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Occupancy</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tickets Sold</td>
<td>20.00</td>
<td>1,440</td>
<td>2,160</td>
<td>2,880</td>
</tr>
<tr>
<td>Ticket Rev. ($000)</td>
<td>2,350</td>
<td>1,692</td>
<td>2,538</td>
<td>3,384</td>
</tr>
<tr>
<td>Gift Shop Rev.</td>
<td>2,000</td>
<td>144</td>
<td>216</td>
<td>288</td>
</tr>
<tr>
<td>Concessions Rev.</td>
<td>1.50</td>
<td>108</td>
<td>162</td>
<td>216</td>
</tr>
<tr>
<td>Total Revenues</td>
<td>23.50</td>
<td>1,692</td>
<td>2,538</td>
<td>3,384</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COGS:</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent</td>
<td>32%</td>
<td>540</td>
<td>540</td>
<td>540</td>
</tr>
<tr>
<td>Gift Shop</td>
<td>40%</td>
<td>86</td>
<td>115</td>
<td>144</td>
</tr>
<tr>
<td>Concessions</td>
<td>35%</td>
<td>57</td>
<td>76</td>
<td>95</td>
</tr>
<tr>
<td>Card Fees</td>
<td>0.5%</td>
<td>8</td>
<td>13</td>
<td>17</td>
</tr>
<tr>
<td>Total COGS</td>
<td>38%</td>
<td>644</td>
<td>696</td>
<td>748</td>
</tr>
</tbody>
</table>

| Operating Revenues | 62%  | 1,048| 1,842| 2,636| 3,430|
| Operating Expenses | 55%  | 925  | 1,041| 1,156| 1,272|
| EBITDA           | 7%   | 123  | 802  | 1,480| 2,158|

| Development Cost ($000) | 5 | 5,000 | 10,000 |
| Cash-on-Cash ROI | 2.5% | 16.0% | 29.6% | 43.2% | 7.1% | 20.7% | 34.2% | 47.8% |
| Revenues Per Seat | $1,692 | $2,538 | $3,384 | $4,230 | $1,692 | $2,538 | $3,384 | $4,230 |

Source: Harrison Price Company.
theater is more expensive to build and to operate. To justify a large theater, the performer or entrepreneur must be confident of generating large audiences internal efforts coupled with those of BLACC/CVB. HPC recommends that the City of Branson should refuse to permit new theaters of more than 2,000 seats, although that may be a non-issue in today’s environment. An even more extreme position would be to prohibit any new theater development until existing theaters are operating at sustainable utilization levels.

**Trends in the Music Industry**

Figure 6-2 contains data from the Recording Industry Association of America on the age of those buying music recordings of all forms from 1991 to 2000. Significantly, those 45 or more years old are buying one in four recorded items. While this is labeled as the Baby Boomer generation, it actually includes Matures, etc. Older generations are still buying. Rock music is still king, but in the context of overall popularity, Country music had a brief rise to over 18 percent in 1993 but subsequently declined to about 11 percent in 2000 as shown in Figure 6-3. Country music was the original foundation of the Branson music theater industry, although it is much more broadly based today.

**Prospects for the Future of the Branson Theater Industry**

Theaters in Branson are private enterprises whether they are owned by performers or by promoters. Government cannot and should not determine the success or failure of private theaters. As with any industry, some will fail and then be resurrected by new owners at a reduced cost basis, or be converted to another use, or razed.

HPC did not discover any new ways to generate more show ticket sales. A larger direct marketing budget for BLACC/CVB will help. Bringing new visitors to Branson by development of non-theater venues will also help. Existing performers should be encouraged to significantly change shows to appeal to families in summer months, or to lease theaters in summer to entertainers with high appeal to a younger audience.

An extreme concept inspired during the field trip interviews is to set up a number of theaters as timeshares that would allow performers to choose the time of year and length of time they spend in Branson that would maximize their audience. There are now timeshares for yachts and jet airplanes. Why not a theater? Basic theater operations and management could be provided by the timeshare operator or outside management and the costs allocated to each owner based upon ownership interests. Financing sources for the developer and the performer/buyer would have to be established first.

Every concept that has the ability to draw visitors to the Branson area is a potential benefit to other businesses in the area. Ultimately, the theater industry will reach a stabilized level from which steady long-term growth will occur. That stabilized level may
CONSUMER PROFILE - SALE BY MUSIC CATEGORY

Fig 7-2

Source: The Recording Industry Association of America and Harrison Price Company
CONSUMER PROFILE - PURCHASE BY AGE GROUP

Source: The Recording Industry Association of America and Harrison Price Company
7-21
well be below the number of theaters and seats that are operating today. It will result in improved utilization of capacity and yield reasonable returns to most performers and theater owners. Branson is a unique destination in that it has such a strong theater overlay on top of its initial lakes and scenery resort base. As shown previously, others have attempted to duplicate Branson’s success in the performance theater industry, but have met with limited success.

There are no easy fixes for an industry with over capacity and severe competition for each potential visitor and ticket buyer. Moreover, the lodging industry was also overbuilt in the bubble of the early 1990s, particularly with independent operators lacking adequate marketing budgets. Branson was “happening” on a national publicity scale. The euphoria was contagious, spurred by a lack of lodging during some of the peak periods of the bubble. Most operators in the lodging industry in Branson rely on the BLACC/CVB to bring visitors to the area. They do not attempt to draw new visitors by internal marketing efforts, but strive to get their share of business from the Chamber’s activities.

Inducing new visitors to come to Branson is a difficult task when there is little change in the attractions offered and no significant new attractions to generate new and repeat visitation. It is even more difficult to accomplish with a limited budget for media advertising of about $4.5 million. Currently, BLACC/CVB receives 25 percent of Tourism Tax Collections in the City of Branson. As presented previously, a proposed local tax of 1% on retail sales and 0.5% on restaurant sales could solve that issue by generating $5.0 million or more in added annual marketing budget, putting the Branson/Tri-Lakes area on a more equal footing with some of its direct competitors. The potential effects of more available marketing resources on future theater ticket sales are explored in Tables 7-9 and 7-10. In Table 7-9 a rounded average of $100 million in theater ticket sales in recent years and an average ticket price of $20.00, indicates roughly 5.0 million tickets sold, or a daily average of 19,600 tickets sold during the season. At the current level of 1.6 shows daily and a profitable utilization rate of 40 percent, less than 31,000 seats are supported – well below the current number. If shows are reduced to 1.0 per day per theater by mutual agreement of the theater owners, 49,000 seats could be supported at economic levels of operation. However, that is not likely to happen and the City has no mechanism to enforce such a limit.

In Table 7-10, HPC has estimated the possible effect on theater ticket sales provided by the increased marketing budget potentially available from the proposed new sales tax. The BLACC/CVB budget would increase to almost $12 million, an 80 percent increase over present funding. Assuming that the cost of attracting new visitors would increase from $1.30 to $2.00, an estimated 2.4 million new visitors could be drawn to the area. At 1.09 tickets sold per visitor on average, total ticket sales could reach 7.5 million (rounded). That would support about 46,000 seats at a profitable 40 percent utilization, even at 1.6 shows per day. That number is roughly equivalent to the current operating inventory. A slightly lower average occupancy could support all of the present inventory. For that to happen the new tax and proper stewardship are required,
Table 7-9

ESTIMATED THEATER TICKET SALES AND SEATS SUPPORTED
BRANSON - 2000

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Ticket Sales</td>
<td>$ 100,000,000</td>
</tr>
<tr>
<td>Average Ticket Price</td>
<td>$ 20.00</td>
</tr>
<tr>
<td>Tickets Sold</td>
<td>5,000,000</td>
</tr>
<tr>
<td>Operating Season</td>
<td>255</td>
</tr>
<tr>
<td>Tickets Sold Per Day</td>
<td>19,608</td>
</tr>
<tr>
<td>Average Shows Per Day</td>
<td>1.6</td>
</tr>
<tr>
<td>Average Occupancy - Ideal Min.</td>
<td>40%</td>
</tr>
<tr>
<td>Seats Supported</td>
<td>49,020</td>
</tr>
<tr>
<td>Theaters @ 1,200 seats</td>
<td>41</td>
</tr>
</tbody>
</table>

Source: City of Branson and Harrison Price Company.
Table 7-10

ESTIMATED ADDITIONAL TOURISM AND TICKET SALES RESULTING FROM INCREASED MARKETING BUDGET

<table>
<thead>
<tr>
<th>Theater Tickets Sold - Prior Years</th>
<th>5,000,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLACC/CVB Marketing Budget - 2000</td>
<td></td>
</tr>
<tr>
<td>Personnel Cost</td>
<td>19.2% $ 1,250,000</td>
</tr>
<tr>
<td>Direct Promotion</td>
<td>64.6% $ 4,200,000</td>
</tr>
<tr>
<td>Other Costs</td>
<td>16.2% $ 1,050,000</td>
</tr>
<tr>
<td>Total Budget</td>
<td>100.0% $ 6,500,000</td>
</tr>
<tr>
<td>Marketing Budget Per Ticket Sold:</td>
<td></td>
</tr>
<tr>
<td>Direct Promotion</td>
<td>$ 0.84</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$ 1.30</td>
</tr>
<tr>
<td>Added Budget From New Tax:</td>
<td>$ 7,000,000</td>
</tr>
<tr>
<td>Direct Marketing and Promotion</td>
<td>75% $ 5,250,000</td>
</tr>
<tr>
<td>Estimated Future Mktg. Cost Per Ticket Sold</td>
<td>$ 2.00</td>
</tr>
<tr>
<td>Tickets Sold to New Visitors @</td>
<td>1.09 / Visitor</td>
</tr>
<tr>
<td>Total Future Ticket Sales (Rounded)</td>
<td>7,500,000</td>
</tr>
<tr>
<td>Seats Supported:</td>
<td>Utilization Shows/Day</td>
</tr>
<tr>
<td>(225 day season)</td>
<td>40% 1.6</td>
</tr>
<tr>
<td></td>
<td>35% 1.6</td>
</tr>
</tbody>
</table>

Source: Branson/Lakes Area Chamber of Commerce/CVB and Harrison Price Company.
and shows must be changed to appeal to different visitor demographics in each season.

HPC concludes that the new tax can provide the resources necessary to draw theatergoers in adequate numbers to profitably support the current seating inventory, provided the product is tailored to visitor preferences.
Section 8

RECOMMENDED NEW FACILITIES AND USES

In prior sections, we have provided background information on the market, compared Branson with other areas, projected future budgets for BLACC/CVB as they may affect future tourism to the area, and explored potential results for the indoor theater industry. However, if new and increasing numbers of visitors are to be drawn to Branson, there must be further diversification of the touristic infrastructure available to attract and entertain them. Marketing alone will not suffice in the long run. There must be new product with substance. This section of the report contains recommendations on private and public facilities to be developed in the future to provide additional thrust to an expanded marketing effort.

Aquarium

HPC recommends a private, for-profit aquarium be developed in the Branson/Lakes area to supplement the existing attractions. The main reasons for this recommendation are:

- An aquarium is sufficiently different from a theme park such as Silver Dollar City or amusement park like Branson USA that direct competition will be minimized.
- Aquariums draw school groups from significant distances because of their high educational values.
- Aquariums appeal to all age groups and travel party types, but have particularly strong attraction for families.
- Facilities are mostly indoors and the climate/temperature control can provide respite from extreme heat, cold or precipitation outdoors.
- Aquariums operate year round and can help to attract visitors in the off-seasons when other amusements are closed.

A summary of the locations and approximate annual attendances at existing major aquariums nearest Branson are shown in Table 8-1. These facilities ring Branson at distances over 300 miles, which indicates that there is a void to be filled. Aquariums draw dominantly from a radius of up to 150 miles. Zoos with major aquarium elements are also listed, but have less direct competitive impact.
Table 8-1

ATTENDANCES AT TOP MARINE ATTRACTIONS IN BRANSON MARKET AREA

<table>
<thead>
<tr>
<th>Institution</th>
<th>Resident Market Area</th>
<th>1999 Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aquariums</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John G Shedd Aquarium</td>
<td>Chicago</td>
<td>1,851,618</td>
</tr>
<tr>
<td>Ripley's Aquarium of the Smokies</td>
<td>Gatlingburg/Pigeon Forge</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Ripley's Aquarium at Myrtle Beach</td>
<td>Myrtle Beach</td>
<td>1,100,000</td>
</tr>
<tr>
<td>Tennessee Aquarium</td>
<td>Chattanooga, TN</td>
<td>1,080,000</td>
</tr>
<tr>
<td>Aquarium of the Americas</td>
<td>New Orleans</td>
<td>1,004,286</td>
</tr>
<tr>
<td>Newport Aquarium</td>
<td>Newport, KY</td>
<td>926,712</td>
</tr>
<tr>
<td>Colorados Ocean Journey</td>
<td>Denver</td>
<td>912,648</td>
</tr>
<tr>
<td><strong>Zoos with Major Aquarium Elements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denver Zoological Gardens</td>
<td>Denver</td>
<td>1,714,878</td>
</tr>
<tr>
<td>Houston Zoological Gardens</td>
<td>Houston</td>
<td>1,450,000</td>
</tr>
<tr>
<td>Columbus Zoo and Aquarium</td>
<td>Powell,/Columbus</td>
<td>1,288,346</td>
</tr>
<tr>
<td>Minnesota Zoological Garden</td>
<td>Minneapolis</td>
<td>1,173,240</td>
</tr>
<tr>
<td>Fort Worth Zoo</td>
<td>Fort Worth</td>
<td>1,102,434</td>
</tr>
<tr>
<td>Indianapolis Zoo</td>
<td>Indianapolis</td>
<td>833,224</td>
</tr>
</tbody>
</table>

Note 1: Members of AZA.

Source: AZA and Harrison Price Company.
HPC anticipates that an aquarium in Branson could attract between 1.0 million and 1.2 million visitors annually when attendance stabilizes, with the first two years being somewhat higher. Admission prices should be $15.00 to $16.00 for adults, with tickets for children, seniors, the military and groups scaled lower. A short stay of about two hours would result in food and beverage expenditures averaging about $2.00 to $3.00 per capita, and a well-stocked retail shop should generate another $4.00 to $5.00. Total per capita spending should approximate $18.00 to $20.00.

Gross revenues are expected to range from $18 million to $24 million and the facilities should cost in the range of $45 to $50 million to build, excluding land cost.

The aquarium should be located on a lakefront site if possible.

It is estimate on a preliminary basis that the relatively small resident market should generate 100,000 to 200,000 annual visitors (more in the first two years), with the remainder being overnight visitors coming to Branson from beyond 100 miles. Of those, we expect as many as one third to one half to be strongly influenced by the aquarium in the decision to visit (or revisit) the Branson/Lakes area.

Developers of the Cincinnati area facilities are reported to be looking for additional locations. Ripley Entertainment has created private, for-profit aquariums in Myrtle Beach, SC, and Gatlinburg, TN, and are also presumed to be actively seeking new locations. These private facilities generally require 1.0 million to 1.5 million visitors annually to succeed financially.

**Murals Program in Downtown Branson and Hollister**

The small town of Chemainus on the east coast of Vancouver Island, BC, Canada, with virtually no history of tourism, has generated visitation of over 400,000 annually by creating 33 history-based murals and 6 sculptures in the downtown area. The project started in 1982-83, with murals completed as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Murals</th>
<th>Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td>1982</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>1983</td>
<td>7</td>
<td>12</td>
</tr>
<tr>
<td>1984</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>1985</td>
<td>0</td>
<td>16</td>
</tr>
<tr>
<td>1986</td>
<td>4</td>
<td>20</td>
</tr>
</tbody>
</table>
CHEMAINUS MURALS

Festival of Murals
Since 1983
<table>
<thead>
<tr>
<th>Year</th>
<th>Mural Count</th>
<th>Year</th>
<th>Mural Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1987</td>
<td>1</td>
<td>1990</td>
<td>0</td>
</tr>
<tr>
<td>1988</td>
<td>3</td>
<td>1991</td>
<td>4</td>
</tr>
<tr>
<td>1989</td>
<td>2</td>
<td>1992</td>
<td>2</td>
</tr>
<tr>
<td>1990</td>
<td>0</td>
<td>1993</td>
<td>1</td>
</tr>
</tbody>
</table>

As can be seen from the above, 16 murals were created in the first three years of the program, the reputation became established, and the pace of additions slowed. By 1993, roughly $250,000 (Canadian) had been spent on the murals project by individuals, corporations and all levels of government. The downtown area has been rejuvenated, over 100 new businesses have been opened to serve the visitors, and the 3,500 residents of the town have a new sense of local pride.

The murals program was undertaken partly as an attempt to diversify an economy that was dependent on a sawmill that was scheduled to close in 1983 (replaced in 1985). It worked. The murals program in Chemainus has received international acclaim as a downtown redevelopment concept excellently implemented.

Other areas have adopted the murals concept (usually with less organizational and artistic success) as a way to beautify their cities and attract new visitors. For example, four nearby communities on the central California coast have completed 26 murals in the past several years – Cayucas, 10; Morro Bay, 7; Los Osos, 6; Cambria, 3. Just south of that region, Lompoc has created a similar number of murals. Other areas in California jumping on the murals bandwagon include Eureka, Quincy, Susanville, and Twenty-Nine Palms.

HPC recommends a murals program for downtown Branson and Hollister at least, and carried through to other areas in Stone and Taney counties where appropriate. The area has a rich history including outdoor recreation, dam/lake building, natural resource extraction and processing, and a unique Ozarks culture. That history can be the basis of a quality murals program. The College of the Ozarks History Department and Arts Department may be resources that could be tapped for this program. Likewise, similar departments at Universities and Colleges in nearby Springfield may also be important resources for the murals program, and the possibility of extending murals and sculptures to Springfield should be seriously considered.

The arts/murals program is not a ticketed attraction. Visitors viewing the murals are not charged for the experience. They may buy literature, souvenirs and some food and beverages, but their contribution to the economy of the
Branson/Lakes area will be limited unless additional artist studios, arts and crafts shops, antique shops and other unique specialty shops are also developed to serve the guests. It must be a quality program to be effective. The murals program should also be accompanied by a community beautification program designed to foster community pride and result in all properties visible to guests being well maintained and attractive. That was the case in Chemainus.

The murals program is a form of cultural tourism that is gaining popularity among educated Boomers. With the resources available to Branson/Lakes (compared to Chemainus), it should be possible to create a demand for at least 500,000 new visitors. These visitors will be split between day trips and overnight visitors. These added visitors would generate tax revenues estimated as follows:

<table>
<thead>
<tr>
<th>Additional Visitors</th>
<th>500,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assumed Day Trips @ 40%</td>
<td>200,000</td>
</tr>
<tr>
<td>Assumed Overnight Trips – one-night stays @ 60%</td>
<td>300,000</td>
</tr>
<tr>
<td>Daily Spending Per Visitor – Day Trips</td>
<td>$30</td>
</tr>
<tr>
<td>-- Overnight Trips</td>
<td>$70</td>
</tr>
<tr>
<td>Expenditures -- Day Trip Visitors</td>
<td>$6.0 million</td>
</tr>
<tr>
<td>-- Overnight Visitors</td>
<td>21.0 million</td>
</tr>
<tr>
<td>Total</td>
<td>27.0 million</td>
</tr>
<tr>
<td>Sales and Tourism Tax Generated @ 1.8%</td>
<td>$486,000</td>
</tr>
</tbody>
</table>

A budget of $500,000 to $1,000,000 should be anticipated for the murals program, including some community beautification work. If the Chemainus model is followed, the cost of some of the art work can be covered by sponsorships/contributions by area businesses, individuals and government, thus reducing the cost of creating the art to the responsible Foundation. The annual tax revenues should return the investment in just a few years. If overnight visitors drawn specifically by the murals program (including new arts and crafts shops) stay for more than one night, a broader impact on area businesses will be felt and higher tax revenues generated.

The above estimates deal only with new visitors. Because it is free, the total number of people stopping to see the murals should be in the millions.

**Convention Center/Arena**

A Committee was created under BREDA to establish potential market support for a convention center in the Branson/Lakes area, and to recommend location, sizing and operating format if a facility was found to be feasible. A selected number of qualified consultants in the fields of economics, physical planning and
operations were requested to submit proposals for analysis of convention center potential. A firm was selected to do the study and a contract was in negotiation when the proposed Branson Landing project was announced for the downtown lakefront. Branson Landing has subsequently progressed with City support and will include a convention center with 150,000 square feet of exhibit space and a 10,000-seat arena on an adjacent site.

A convention center would introduce a new element of demand for most commercial activities in the area. It is expected to generate new visitors for direct convention participation, and to expose them to the breadth of entertainment complexes and natural beauty of the area. Some of those will return for extended visits with their families or friends.

Because a convention center will either be built as part of Branson Landing or will be studied intensively by outside consultants, estimates of added tourism included here are illustrative only. The potential for additional visitation as an increment to other recommended programs is estimated to be in the range of 200,000 to 300,000 annually.

**Waterfront Villages**

During the initial field trip, HPC observed that the waterfronts of Lake Taneycomo and Table Rock Lake are devoid of modern entertainment center development. Water views and promenades along bodies of water have become features of both urban and resort environments, and often become favored gathering places for residents and tourists alike.

When local entertainers began to established theaters on Highway 76 west of downtown Branson, the stage was set for the ultimate development of "The Strip", which has become the core of the "Live Music Capital of the World". The Strip begins about three miles west of downtown and is packed with theaters, lodging, shops, restaurants and amusements for another two miles. The portions of Highway 76 between downtown and The Strip are also highly developed commercially, but with fewer theaters.

Downtown suffered from the concentration of theaters and lodging being developed to the west, and the waterfront and lakes were ignored by a large segment of the new visitors drawn by the music shows. The primary developer of the proposed Branson Landing project identified the void in modern waterfront development. The developer, Jacobson Entertainment Group "is Australia's foremost promoter with a vast business empire of which its primary expertise is in the presentation and promotion of live entertainment and the management and direction of venues and facilities" (excerpt from the press release announcing the proposed Branson Landing project). The project will include the convention center/arena/exhibit hall complex mentioned previously, and will also include:
• 350 room convention hotel with 300 restaurant seats, business center, gym and pool
• 116,000 square feet of retail space
• 128,000 square feet of office space
• 30 slip commercial marina
• 60 condominiums/apartments
• 64 single-family waterfront lots.

It is an aggressive mixed-use program and will be developed in phases. It is purportedly oriented to a younger age group than is now attracted to Branson. This project coupled with a murals program in adjacent portions of downtown Branson could result in a rebirth of the area.

HPC further concludes that at an opportune future time an entertainment complex should also be developed on an appropriate waterfront site on Table Rock Lake. It should be coupled with a large marina with very active programs for water play on the lake during the non-winter months. Characteristics of such a development are outlined as follows:

<table>
<thead>
<tr>
<th>Leasable area – sq. ft.</th>
<th>100,000 to 150,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenant mix - %</td>
<td></td>
</tr>
<tr>
<td>Restaurants &amp; specialty snacks</td>
<td>35%</td>
</tr>
<tr>
<td>Entertainment venues</td>
<td>30%</td>
</tr>
<tr>
<td>Specialty shops</td>
<td>35%</td>
</tr>
<tr>
<td>Development cost @ $350 per sq. ft.</td>
<td>$35 to $52 million</td>
</tr>
<tr>
<td>Annual sales @ $300 per sq. ft.</td>
<td>$30 to $45 million</td>
</tr>
</tbody>
</table>

Shops should be small and offer items that are very different from those available at home. Restaurants should vary in size and type of menu. Entertainment should include nightclubs and bars with entertainment.

This project would benefit from an entertainment complex like Jillian’s or Dave and Buster’s, which are sports bar/entertainment centers for young adults that include a high-tech arcade, virtual games and (in the case of Jillians) disco bowling – dim lights, fluorescent balls and pins, music videos on large screens above the pins, etc. They also include a restaurant with a limited and basic menu. Many older individuals also enjoy this environment because there is an emphasis on sports and participation. Children are typically allowed in certain areas of the complex where alcohol is not served.
In the above calculations, it is assumed that the promoter will make minimum lease payments equal to amortization costs on a revenue bond issued to finance the amphitheater. At the low end, rent paid to the City would be the minimum. At higher event levels and ticket prices, a suggested provision by which the City receives 25 percent of net operating income above the minimum lease payment would yield an additional lease payment of up to $600,000 which could be held as an amortization reserve or used to retire bonds early. The promoter's profit is marginal at the low performance level, but could increase to 22 percent of gross revenues at the high end.

The number of individuals added to annual overnight visitation to Branson will be very small. Many concert attendees will be from the resident market area and will spend little time in the area before or after a concert. Assuming that roughly 25 percent are new overnight visitors, only 50,000 to 75,000 are added to the overall count. However, the importance of this activity is in helping to change the perception of Branson from music theaters featuring country music to a greater variety of music with emphasis on attracting a younger audience by presenting prominent touring acts.

Note: We recognize that the recently announced Branson Landing project includes a 10,000-seat arena to be financed by industrial development bonds with no risk to the City. That facility would satisfy the need for a larger concert venue than now exists in the area. An amphitheater will not be needed if/when that facility is constructed.

Festivals, Events and Parades

Festivals have long been used throughout the US to promote the cultural heritage of an area to both residents and visitors. Table 8-2 lists successful festival/event concepts staged in various areas. These are celebrations of things historic, artistic, social, sporting, educational, etc., and sometimes frivolous. Duration can be anything from a single day to a month or more depending on the subject and the stamina of the organizers. Some are staged to make a profit for individuals, civic organizations or charities. Often they are not designed to cover costs but simply to honor something worthy of serious celebration or just fun. Costs to stage a festival or event can run from a few thousand dollars to millions.

In festivals and events there is the opportunity to use tourism to generate revenue, attract attention to causes, and to develop the community to everyone's advantage. Often festivals are drawing cards for people outside the local area.
### Table 8-2

**LIST OF SUCCESSFUL FESTIVAL/EVENT CONCEPTS**

<table>
<thead>
<tr>
<th>Event Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Festival of Lights (Christmas)</td>
</tr>
<tr>
<td>Jazz/Music Festivals</td>
</tr>
<tr>
<td>Arts and Crafts Festivals</td>
</tr>
<tr>
<td>Fantasy of Trees</td>
</tr>
<tr>
<td>Bonfiring</td>
</tr>
<tr>
<td>Naturefest</td>
</tr>
<tr>
<td>Native American Heritage</td>
</tr>
<tr>
<td>Vehicle Meets/Shows</td>
</tr>
<tr>
<td>Classic Car Races</td>
</tr>
<tr>
<td>Hot Air Balloons</td>
</tr>
<tr>
<td>Fireworks/Laser Shows</td>
</tr>
<tr>
<td>Pageant of the Masters</td>
</tr>
<tr>
<td>Renaissance Fair</td>
</tr>
<tr>
<td>Battle of the Bands</td>
</tr>
<tr>
<td>International/Ethnic Festivals</td>
</tr>
<tr>
<td>Marathon/Triathlon</td>
</tr>
<tr>
<td>Spring Training</td>
</tr>
<tr>
<td>Rodeo</td>
</tr>
</tbody>
</table>

Source: Harrison Price Company.
who might not otherwise visit the locale. In addition to promotion value, festivals can generate real measurable economic impact and bolster revenues for a broad range of businesses -- retailers, restaurants, hotels, vendors and sponsors. Many contribute to helping the region compete on the national stage. In recent years many communities have documented the economic impact of such festivals and events through factual data analysis. Examples of some successful festivals and their economic impact are as follows:

**Kodak Albuquerque International Balloon Fiesta, New Mexico**

Marking its 29th year in 2000, the fiesta is the world's largest event of its kind featuring over 1000 hot air balloons from across the US and around the world. Each year over a million people gather at the Albuquerque Balloon Park in addition to others who watch from outlying areas to witness this unique and spectacular event. Over a nine-day-period in October, many popular special events are held including mass ascensions, balloon glows at night, flight contests, launching of incredible special shaped balloons, etc. This event also features fireworks, music, food, and concessions of all types.

The Balloon Fiesta has become part of the local tradition and culture as well as providing great entertainment for local residents and visitors alike. It has become an important economic resource for local businesses and governments. This event injects an estimated $76.8 million of direct spending into the New Mexico economy each year. An economic and market analysis of spectators to the event revealed the state and local tax impacts of the 1999 Balloon Fiesta totaled $5.67 million, including: $1.03 million in local lodging taxes, $0.54 million in state gasoline excise taxes, $4.1 million in gross receipts sales taxes. The total estimated tax benefit to the City of Albuquerque from the Balloon Fiesta is $1.45 million in lodging and sales taxes. In 1999, fifty-six percent of Balloon Fiesta spectators were visitors, and forty-four percent were residents of Albuquerque. The average visitor group numbered approximately four people and made three visits to Balloon Fiesta Park. They spent $173 in the park grounds for souvenirs/gifts, food and beverage, entertainment, film, and other goods and services. It was also found that non-resident spectator groups spent, on average, $1,282 in the Albuquerque economy, primarily for lodging, meals, and retail shopping.

**SunFest, West Palm Beach, Florida**

Held annually the first weekend in May in the beautiful setting of the palm tree lined Intra-coastal Waterway in downtown West Palm Beach, Florida, SunFest was created 19 years ago to lengthen the Palm Beach County tourism season. SunFest is Florida's largest jazz, art and waterfront
festival. Daily admission is $10. Featuring more than 50 concerts by national recording artists (like Lenny Kravitz, Jimmy Buffett, and Melissa Etheridge) and regional groups. Musical styles at SunFest range from rock and pop music to jazz, swing, folk, ethnic, world beat, Latin, reggae and more.

Its local economic impact averages $16 million annually, creating a total economic impact of over $160,000 million over the past ten years. The event attracts over 300,000 guests each year. SunFest 2000 drew 320,000 visitors over the five day run. Opening night set a new attendance record with 35,000 people coming to see Lenny Kravitz and Spyro Gyro. On average, 30% of attendees over the last ten years have come from outside Palm Beach County. This translates to an estimated 900,000 visitors over the last decade, generating close to $12 million in room revenue in Palm Beach County.

Veterans Homecoming, Branson, Missouri

Branson already knows the potential impact of festivals and events. America’s largest Veterans Day celebration, "Veterans Homecoming," takes place in Branson annually in early November. This seven-day tribute includes over 60 special events, which present patriotic salutes to veterans. Branson is becoming a Mecca of veteran’s celebrations since the homecoming program was launched in 1995. With the support of over 30 live performance theaters and the local business community, Branson has earned a reputation as being one of the most hospitable places in the nation for veterans. Judging from the increasing number of reunions and attendance growing from the 40,000 in November 1997 to a reported 117,400 in 2000, and with 125,000 visitors expected at the 2001 event, the veterans program has arrived. An economic impact study showed that in 1999, the event generated spending of $36.9 million in Branson and provided approximately $1.5 million in state and local taxes, according to the sponsoring Branson Veterans Task Force.

Summerfest, Milwaukee, Wisconsin

Case Study – The Big Gig

Summerfest’s primary offering is an annual 11-day music blowout that takes place on 72 acres along the shores of Lake Michigan in downtown Milwaukee, WI. It reached record-breaking attendance of over 1 million visitors (1,039,794) this summer. The festival offers excellent food, big-name music and comedy acts and a variety of activities for children and families.
Development History

The festival begun as a community gathering in 1968, was the brainchild of then City Mayor Henry Maier after a visit to Oktoberfest in Munich, Germany. His vision was to re-energize the downtown and to provide a sense of community pride while offering residents affordable grandiose "out-of-town" vacation experience right in their hometown during the height of the summer season. Held with enthusiasm at 35 separate locations throughout the downtown area, the first festival closed with a slim profit of less than $10,000. Summerfest 69 expanded to 60 locations, but uncommon heat spoiled the fun, and rain completely washed out the last day. Facing $164,000 debt, civic leaders determined that change was mandated. The determination of the private sector to see the festival succeed is what essentially saved Summerfest.

In 1970, the festival moved to Milwaukee's lakefront. At the time, the site was an abandoned 15-acre Nike missile base that was drab and stark in appearance. Throughout the early '70s, the festival consisted of wooden platforms raised on concrete blocks, and festival goers were often forced to navigate muddy pathways on rainy days. By the middle of '70s, permanent stages and structures were built at the festival site, and more aesthetic improvements were made to the facility. The scent of success was in the air, as large crowds gathered to see performances by Sly and the Family Stone, B.B. King, Jackson Five, Little Richard, Dionne Warwick, Edgar Winter, The Doors, Sammy Davis Jr., Isaac Hayes Movement, Johnny Cash, James Taylor, Earth, Wind & Fire, Bee Gees, Tony Bennett, Willie Nelson, Dolly Parton, Journey, Natalie Cole, The Beach Boys, Pointer Sisters, Allman Brothers Band, and the list goes on and on.

By the 1980s, more permanent stages and structures had appeared on the grounds, festival organizers had secured a long-term lease agreement with the City of Milwaukee for use of the land, and the future of Summerfest was bright. In 1983, turnstiles were added at the admission gates allowing for accurate tracking of attendance figures. In 1983 Summerfest recorded an attendance of 657,429 and by the end of the decade that number rose to 830,500. One of the most memorable improvements to the festival park was unveiled in 1987, when the Marcus Amphitheater, a 24,000-seat, state-of-the-art entertainment venue opened to host the top touring attractions. The tradition of Summerfest featuring stellar entertainment continued throughout the 80s.

As the festival moved into the 90s, improvements to the Summerfest grounds continued to be made and the popularity of the festival continued to grow. New stage areas were constructed and a number of other improvements occurred throughout the 1990s. The hottest entertainers continued to fill the line-ups on the stages during Summerfest, earning the festival the 1999 Guinness Book of Records title as "Biggest Music Festival."

Venues on the Festival Grounds

Summerfest is managed by Milwaukee World Festival Inc., a non-profit group with 50 full-time employees (a far cry from the mere 4 full time jobs
in 1974. Approximately 2,500 full-time equivalent jobs are created during the summer event.

A map of the festival grounds is shown in Figure 8-1. The festival boasts 13 stages (detailed in Table 8-3) that are filled with exciting performances from 11:30 a.m. until midnight each day of the festival, and the lakefront location provides the perfect atmosphere for a summertime music extravaganza. Aside from the music, there are plenty of activities for children and families including a Children's Theater and PlayZone, water shows, sports demonstrations, an amusement ride park, shopping in three marketplaces, and much more (bingo, jugglers, magic shows, midway, in-line skating competition and many other fun sport events). A detailed festival program for 2001 is shown in Appendix A.

About 45 local restaurant and bakery owners won the right to sell food, which ranges from Thai to Cajun. Affordable, high-quality food is a tradition. Although vendors pay festival organizers 25 percent of their revenues, they must charge the same prices they charge at their regular locations.

Ticket Information

The tickets are surprisingly affordable:

- **Gate Admission**
  - Adult (over age 12)
    - $8.00 in advance (single day, good any day),
    - $21.00 in advance (three-day pass, good any three days);
    - $9.00 at the gate Sunday through Thursday;
    - $10.00 on Friday, and Saturday;
  - Children (Age 12 and under) –
    - free, when accompanied by an adult Monday through Friday until 6 pm,
    - 50 cents after 6 pm during the week and all day Saturday ~ Sunday
  - Senior (60 and over)
    - $1.00 at all times

- **Amusement Ride Park**
  Wristband costs $20 and is good for up to 15 rides the day of purchase.

- **Summerfest Pin**
  The Summerfest pin holds special significance as a true FEST-A-HOLIC honor. Patrons wearing the 2001 pin get in free at all gates from 11:30 a.m. to 3 p.m. weekdays and any time July 2 and July 4. The pin also comes with discounts on amusement rides and a chance to win prizes. Approximately one in every 30 pins is an instant winner. All Grand-Prize Winners, in addition to their prize, have the chance to draw for a single prize of One Million Dollars at the Grand-Prize Drawing event. 2001 marks the twelfth year of the Summerfest Pin: for the first time, all 120,000 Summerfest pins
Figure 8-1
SUMMERFEST FESTIVAL GROUNDS
### Table 8.3
STAGE FACILITIES IN SUMMERFEST, MILWAUKEE

<table>
<thead>
<tr>
<th>Venue/Stage</th>
<th>Capacity</th>
<th>Year built / Budget</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 MARCUS AMPHITHEATER</td>
<td>24,000</td>
<td>1987</td>
<td>$12 Million</td>
</tr>
<tr>
<td>2 MILLER OASIS</td>
<td>6,100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 BRIGGS &amp; STRATTON BIG BACKYARD</td>
<td>5,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 HARLEY-DAVIDSON ROADHOUSE</td>
<td>5,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 MOUNTAIN DEW ROCK STAGE WITH POINT BREWERY AND LAZER 103</td>
<td>5,500</td>
<td>1999</td>
<td></td>
</tr>
<tr>
<td>6 LEINIE LODGE AT THE KOSS PAVILION WITH CBS 58 AND ROCK 102 ONE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 POTAWATOMI BINGO CASINO STAGE WITH SPRECHER BREWING AND THE ONION NEWSWEEKER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 WISN-TV CHANNEL 12/MASTER LOCK GARDENS STAGE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 PIGGLY WIGGLY'S BIG STAGE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 PEPSI/99 WMYX HYUNDAI COMEDY PAVILION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 TICKETMASTER LEGEND STAGE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Children's Hospital of Wisconsin/Roundy's &amp; Pick 'n Save Children's Theater &amp; Playzone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 Milwaukee Admirals Sports Area/Klub Kiss</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Milwaukee Journal Sentinel and Hanson Price Company
were sold. People used the $3 pins 150,000 times, up from 109,000 last year.

Special evening performance at Marcus Amphitheater

For performances taking place in the Marcus Amphitheater during Summerfest, patrons must gain admission to the Summerfest grounds in addition to purchasing a ticket to the concert. Tickets for the evening concerts cost less than $25 this year.

Known as the World’s largest music festival, Summerfest attracts the best of the world’s popular entertainers each year. Summerfest has both legends and up-and-comers gracing its 13 stages but headliners play the festival’s 24,000 seat Marcus Amphitheater. Paul Simon and Brian Wilson, BoDeans, Destiny’s Child, Tom Petty & the Heartbreakers, Blink-182, Tim McGraw and Bon Jovi are headling this year’s festival. The Grounds Stages feature G. Love & Special Sauce, James Brown, the Cult, the Wallflowers, Jonny Lang, Cheap Trick, Monster Magnet, Little Feat, Everclear and Blues Traveler. Table 8-4 lists headliners and admission in 2000/2001. This year nine of the 11 evening shows at the Marcus Amphitheater sold out, with the other two coming close.

Attendance Record

Summerfest’98 reportedly brought more than 900,000 music and fun lovers to the festival grounds, generated about $18 million in revenues and contributed millions more to the local economy in the form of tourist dollars spent on hotels, food and other attractions. Summerfest attendees spent $63.7 million during the festival’s 11-day run, according to local officials.

Table 8-5 shows the festival’s attendance record over the years. In 1983 Summerfest recorded an attendance of 657,429 and by the end of the decade that number rose to 830,500. Attendance climbed 30 percent in ten years, from 671,412 in 1986 to 873,235 in 1996. This year Summerfest ended its run with attendance of 1,039,794, a record set with the boost of near-perfect weather and strong promotion. That is up more than 9% from 948,503 last year, when a rain-soaked July 2 cost the festival about 70,000 ticket sales. The previous Summerfest attendance record was 954,035 set in 1999.

Summerfest increased its advertising budget to $800,000 this year, up from $500,000 two years ago. Nearly $175,000 more was spent this year on attracting people from out of town. Print ads hit many cities for the first time and other cities, such as Rockford, IL, and Chicago heard more about the 11-day festival on the radio. The recent push to draw out of towners is not a new concept for Summerfest organizers. For years, marketing officials have argued that the 11-day event needed to be promoted strongly outside southeastern Wisconsin. This is the first year the Summerfest board has approved a large enough advertising budget to accomplish that goal.

8-18
# Table 8-4

**PERFORMANCE ACTS AT MARCUS AMPHITHEATER, SUMMERFEST**

<table>
<thead>
<tr>
<th>Date</th>
<th>Act</th>
<th>Music Type</th>
<th>Target</th>
<th>Price ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6/29 H</td>
<td>Jimmy Page and The Black Crowes</td>
<td>Pop and Rock</td>
<td>Baby Boomer</td>
<td>26.00/32.00</td>
</tr>
<tr>
<td>6/30 F</td>
<td>Susan Tedeschi/The Allman Brothers Band</td>
<td>Rock</td>
<td>Baby Boomer</td>
<td>19.50</td>
</tr>
<tr>
<td>7/1 S</td>
<td>Christina Aguilera</td>
<td>Teen-Pop</td>
<td>Gen Y</td>
<td>22.00</td>
</tr>
<tr>
<td>7/2 S</td>
<td>Foo Fighters/Blonde Redhead/Red Hot Chili</td>
<td>Funk Rock</td>
<td>Gen X/Gen Y</td>
<td>20.00</td>
</tr>
<tr>
<td>7/3 M</td>
<td>Bad Religion/Blink-182</td>
<td>Rock</td>
<td>Gen Y</td>
<td>10.00/15.00</td>
</tr>
<tr>
<td>7/4 T</td>
<td>D'Angelo with Eric Benet</td>
<td>R&amp;B</td>
<td>Baby Boomer</td>
<td>27.00</td>
</tr>
<tr>
<td>7/5 W</td>
<td>Don Henley</td>
<td>Pop and Rock</td>
<td>Baby Boomer</td>
<td>20.00/30.00</td>
</tr>
<tr>
<td>7/6 H</td>
<td>Brian McKnight and the MSO</td>
<td>R&amp;B and Soul</td>
<td>Gen Y</td>
<td>20.00</td>
</tr>
<tr>
<td>7/7 F</td>
<td>No Doubt with Black Eyed Peas/Lit</td>
<td>Alt - Hip-Hop and Pop/Rock</td>
<td>Gen X</td>
<td>22.00</td>
</tr>
<tr>
<td>7/8 S</td>
<td>Britney Spears</td>
<td>Teen-Pop</td>
<td>Gen Y</td>
<td>22.00</td>
</tr>
<tr>
<td>7/9 S</td>
<td>The BoDeans with Big Head Todd &amp; The</td>
<td>Pop and Rock</td>
<td>Gen Y</td>
<td>17.50</td>
</tr>
<tr>
<td>2001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6/28 H</td>
<td>Prince</td>
<td>Rock, Soul and R&amp;B</td>
<td>Baby Boomer</td>
<td>30.75/46.00</td>
</tr>
<tr>
<td>6/29 F</td>
<td>Paul Simon/Brian Wilson</td>
<td>Pop and Rock</td>
<td>Baby Boomer</td>
<td>23.25/36.00</td>
</tr>
<tr>
<td>6/30 S</td>
<td>BoDeans with Joan Osborne</td>
<td>Rock</td>
<td>Baby Boomer</td>
<td>23.25</td>
</tr>
<tr>
<td>7/1 S</td>
<td>Poison, Warrant, Quiet Riot and Enuff 'Z' Nuff</td>
<td>Hard Rock</td>
<td>Baby Boomer</td>
<td>18.25</td>
</tr>
<tr>
<td>7/2 M</td>
<td>Destiny's Child with Stacie Orrico and True Vibe</td>
<td>R&amp;B and Soul</td>
<td>Baby Boomer</td>
<td>25.25</td>
</tr>
<tr>
<td>7/3 T</td>
<td>Widespread Panic and Ben Harper</td>
<td>Jam-Rock</td>
<td>Baby Boomer</td>
<td>20.75/28.25</td>
</tr>
<tr>
<td>7/4 W</td>
<td>Tom Petty/Jackson Browne</td>
<td>Rock</td>
<td>Baby Boomer</td>
<td>28.25/41.25/48.25</td>
</tr>
<tr>
<td>7/5 H</td>
<td>Blink 182</td>
<td>Alt-Pop</td>
<td>Gen Y</td>
<td>15.25/25.25</td>
</tr>
<tr>
<td>7/6 F</td>
<td>Three Doors Down</td>
<td>Alt-Rock</td>
<td>Gen Y</td>
<td>22.00</td>
</tr>
<tr>
<td>7/7 S</td>
<td>Tim McGraw</td>
<td>Country</td>
<td>Gen Y</td>
<td>23.25/35.25</td>
</tr>
<tr>
<td>7/8 S</td>
<td>Bon Jovi with Eve 6</td>
<td>Hard Rock</td>
<td>Baby Boomer</td>
<td>34.50</td>
</tr>
</tbody>
</table>

*Note: Marcus Amphitheater is 50% partnership in lease exclusive booking with SFX Entertainment.*

*Source: Milwaukee Journal Sentinel and Harrison Price Company.*
Figure 8-1

SUMMERFEST ATTENDANCE RECORD

Source: Summerfest and Harrison Price Company.
The Future

This June, the city and Summerfest board approved a 20-year lease that secures the lakefront home for the festival after three years of contentious negotiations. Under the lease, the city will get about $1 million a year in rent, a sharp increase from the $30,000 or so paid in past years. The rent will rise 3% each year. In return, the city will borrow about $16.6 million on Summerfest's behalf for improvements to the grounds, including a permanent rock stage, a new mid-gate entrance, and a new children's play area.

The festival grounds also plays host to a multitude of ethnic festivals during summer weekends, such as German Fest, Polish Fest, Irish Fest, Mexican Fiesta, African World Festival, and Festa Italiana. These draw average attendance of 130,000 during their 3-day run.

Summerfest has fulfilled Mayor Maier's vision, and then some. It is a major event in a large market and with a larger market, Chicago, a short distance away. It took decades to achieve its creative and financial success. Branson will not be able to duplicate the Milwaukee experience because of market limitations. But Summerfest is a good model to follow to whatever level proves possible in Branson.

Silver Dollar City Participation

Silver Dollar City has a festival underway during most of its operating season. The 2000 schedule was:

- World-Fest (International) April 5 to May 7
- Great American Music Festival May 13 to June 4
- National Children's Festival June 10 to August 20
- Festival of America (Heritage) September 7 to October 28
- Old Time Christmas November 4 to December 30

Management of Silver Dollar City expressed a willingness and desire to work with the entertainment and business community of Branson to extend these festivals to the communities outside the park gates. They are willing to work with planners of festivals outside their gates to reinforce the message of those events, as appropriate. The experience of SDC festival and events staff could help to jump-start the community programs outside the gates. At the same time the greater Branson/Lakes area should create an entity to promote and manage development and marketing of festivals and events. A full-time staff of four and a separate budget for marketing will be needed, similar to that in the original Summerfest program. Staff and budget can be expanded thereafter as success warrants.
Existing Festivals in Branson, Pigeon Forge-Gatlinburg and Myrtle Beach

The Downtown Branson Association stages seven festivals and is the location of the Veterans Day Parade and Ceremony. Most of the festivals draw a local crowd and some overnight visitors. Table 8-5 shows the comparable festival programs in Branson/Pigeon Forge-Gatlinburg/Myrtle Beach areas.

HPC believes that festivals can be a significant contributor to the overnight visitor market in the Branson/Lakes area if the effort is focused on the type of event that has strong emotional appeal to specific market segments. One suggestion by a local business owner that at first seemed "off the wall" was a festival-celebration of cancer survival (or other life threatening disease). Participants could swap personal stories and discuss new treatments, but mostly share the joy of having overcome serious adversity. It would take very sensitive planning to pull that off, but it illustrates that nothing is out of bounds when considering themes for festivals.

If the Branson Landing project ends up not materializing and an amphitheater becomes a priority, HPC strongly recommends that it be combined with a dedicated festival grounds site that can be gated and controlled.

It is impossible to even suggest the magnitude, content, budgets, development costs, etc with so many variables in play at present. Moreover, Branson business and civic leaders will have to make some basic determinations of goals for a festival program and complex before more definitive analysis is attempted.

Miscellaneous Improvements

Lake Activities

Several marinas of varied quality operate Table Rock Lake. State Park Marina located off Highway 165/265 near the dam is the best and claims to offer the most water sports activities in the Midwest. Ski, fishing and pontoon boat rentals are offered, plus waverunners. Parasailing, scuba diving and a sailboat tour are additional attractions. A similar marina operation should be developed adjacent to the recommended entertainment center.
### Table 8-5

**SPRING FESTIVALS & EVENTS IN BRANSON, PIGEON FORGE, AND MYRTLE BEACH**

<table>
<thead>
<tr>
<th>Month</th>
<th>Branson</th>
<th>Pigeon Forge/Gatlinburg</th>
<th>Myrtle Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>April</td>
<td>Branson Fest (summer kick-off)</td>
<td>Annual Spring Parade</td>
<td>S.O.S. Spring Safari</td>
</tr>
<tr>
<td></td>
<td>World Fest</td>
<td>Festival of Nations</td>
<td>Senior Games</td>
</tr>
<tr>
<td></td>
<td>Main Street Hoops</td>
<td>Smoky Mountain Spring Trout Tournament</td>
<td>Annual Spring Games Kite Flying Contest</td>
</tr>
<tr>
<td></td>
<td>Cedric BeI1Ol!'5 CaJuTVZydeco Fest</td>
<td>Grand Spring Rod Run</td>
<td>Myrtle Gras</td>
</tr>
<tr>
<td></td>
<td>America Sings Singing Competition</td>
<td>Lightning Strike and Electric Shock Survivors</td>
<td>Susan G. Komen International LPGA Golf Tournament</td>
</tr>
<tr>
<td></td>
<td>Branson Remembers - A Memorial Day tribute</td>
<td>Spring Wildflower Pilgrimage</td>
<td>Grans Strand Fishing Rodeo</td>
</tr>
<tr>
<td></td>
<td>Great American Music Festival</td>
<td>Dollywood Festival of Nations</td>
<td>March of Dimes Walk America</td>
</tr>
<tr>
<td></td>
<td>Plumb Nellie Days, Annual Hillbilly Festival, Craft Show and Sidewalk Sale</td>
<td>Smoky Mountain Pontiacs of Tennessee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greatest Knife Show on Earth</td>
<td>Gatlinburg Scottish Festival &amp; Highland Games</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greatest Knife Show on Earth</td>
<td>Grans Strand Fishing Rodeo</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Silver Dollar Rod Run</td>
<td>Blue Crab Festival</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Annual Camaro, Chevelle, Nova Nationals</td>
<td>Veterans Golf Classic</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Perry Stone/Voice of Evangelism Summer Conference</td>
<td>Art in the Park</td>
<td></td>
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<tr>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>Cedric BeI1Ol!'5 Cajun/Zydeco Fest</td>
<td>Annual All Chevy/GMC Trucks Nationals</td>
<td>Annual Blue Crab Festival</td>
</tr>
<tr>
<td></td>
<td>World Fest</td>
<td>Dollywood Festival of Nations</td>
<td>Harley-Davidson Spring Rally</td>
</tr>
<tr>
<td></td>
<td>Branson Motorcycle Rally</td>
<td>Southeastern Pedal Car and Toy Show</td>
<td>Omar Shrine Temple Parade</td>
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<tr>
<td></td>
<td>America Sings Singing Competition</td>
<td>Chevy Classics</td>
<td>Art in the Park</td>
</tr>
<tr>
<td></td>
<td>Branson Remembers - A Memorial Day tribute</td>
<td>Ford F-100's Car Show</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Great American Music Festival</td>
<td>Smoky Mountain Pontiacs of Tennessee</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>Plumb Nellie Days, Annual Hillbilly Festival, Craft Show and Sidewalk Sale</td>
<td>Greatest Knife Show on Earth</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greatest Knife Show on Earth</td>
<td>Gatlinburg Scottish Festival &amp; Highland Games</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Silver Dollar Rod Run</td>
<td>Grans Strand Fishing Rodeo</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Annual Camaro, Chevelle, Nova Nationals</td>
<td>Blue Crab Festival</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Perry Stone/Voice of Evangelism Summer Conference</td>
<td>Veterans Golf Classic</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Chamber of Commerce/CVB, Branson, Pigeon Forge, and Myrtle Beach, and Harrison Price Company.*
Table 8-5

SUMMER FESTIVALS & EVENTS IN BRANSON, PIGEON FORGE, AND MYRTLE BEACH

<table>
<thead>
<tr>
<th>Month</th>
<th>Branson</th>
<th>Pigeon Forge</th>
<th>Myrtle Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>National Children’s Festival</td>
<td>Annual Patriotic Festival</td>
<td>Fourth of July Fireworks Display</td>
</tr>
<tr>
<td></td>
<td>Branson Salutes America’s Farmers</td>
<td>The No. 1 Southeast Mini-Truckin’ and Sport Compact Car Nationals V</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sprint of 76</td>
<td>Annual Mini-Truckin’ Nationals</td>
<td>Fourth of July Concert Series</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grand Truckin’ Nationals</td>
<td>Murrells Inlet Fourth of July Boat Parade</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gatlinburg Craftsman’s Fair</td>
<td>Art in the Park</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Louise Mandrell Smoky Mountains Run for Boy Scouts</td>
<td>Annual Riverfest - Conway</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grand Strand Fishing Rodeo</td>
</tr>
<tr>
<td>August</td>
<td>National Children’s Festival</td>
<td>Annual Original Battle of Trucks Nationals</td>
<td>Annual DuPont World Amateur Handicap Championship</td>
</tr>
<tr>
<td></td>
<td>Cruisin’ Branson Lights</td>
<td>Back to School Sports Card and Collectibles Show</td>
<td>Carolina Craftsmen’s Summer Classic</td>
</tr>
<tr>
<td></td>
<td>The Cruisers</td>
<td>Smoky Mountain Rod Run and Kustom Nationals</td>
<td>Pawleys Island Festival of Music and Art</td>
</tr>
<tr>
<td></td>
<td>Gospel Songwriters Seminar with Dottie Rambo</td>
<td>KidAbra - Children’s Magicians Convention</td>
<td>Grand Strand Fishing Rodeo</td>
</tr>
<tr>
<td></td>
<td>Oldtime Fiddle Contest</td>
<td>Mrs. International Pageant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>BGMA Benefit Gospel Concert</td>
<td>Celebrate Freedom! Pigeon Forge Salutes America’s Veterans</td>
<td></td>
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<tr>
<td></td>
<td>30th Annual White River Valley Arts &amp; Crafts Fair</td>
<td>Annual World Premier Gospel Concert 2001</td>
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</tr>
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<td></td>
<td></td>
<td>Gospel Music Week</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>Festival of America</td>
<td>Shades of the Past Pre-49 Street Rod Show XIX</td>
<td>S.O.S. Fall Migration</td>
</tr>
<tr>
<td></td>
<td>Fall Harvest Crafts Festival</td>
<td>Grand Fall Rod Run</td>
<td>South Carolina’s Largest Garage Sale</td>
</tr>
<tr>
<td></td>
<td>Ceremony Commemorating the End of WWII</td>
<td>Smoky Mountain Harvest Festival</td>
<td>Italian Festival</td>
</tr>
<tr>
<td></td>
<td>Grape &amp; Fall Festival</td>
<td>Smoky Mountain Fall Trout Tournament</td>
<td>South Atlantic Shrimp Parade</td>
</tr>
<tr>
<td></td>
<td>Autumn Daze Craft Festival</td>
<td>Rotary Club Craft Festival</td>
<td>Bayfest</td>
</tr>
<tr>
<td></td>
<td>Fiddlers Convention at Compton Ridge Campgrd</td>
<td>Society for the Documentation of Prehistoric American Relics and</td>
<td>Annual Atalaya Arts and Crafts Festival</td>
</tr>
<tr>
<td></td>
<td>POW/MIA Day</td>
<td>Collectible Items Show/Sale/Swap</td>
<td>Grand Strand Fishing Rodeo</td>
</tr>
<tr>
<td></td>
<td>Ozarks Outrageous Outbreak</td>
<td></td>
<td>Lowcountry Days</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Annual Greek Festival</td>
</tr>
</tbody>
</table>

Source: Chamber of Commerce/CVB, Branson, Pigeon Forge, and Myrtle Beach, and Harrison Price Company.
### Table 8-5

**FALL FESTIVALS & EVENTS IN BRANSON, PIGEON FORGE, AND MYRTLE BEACH**

<table>
<thead>
<tr>
<th>Month</th>
<th>Branson</th>
<th>Pigeon Forge</th>
<th>Myrtle Beach</th>
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</thead>
<tbody>
<tr>
<td><strong>October</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Festival of America</td>
<td>Rotaty Club Craft Festival</td>
<td>Smoky Mountain Harvest Festival</td>
<td>Surfside Beach Family Festival</td>
</tr>
<tr>
<td></td>
<td>Fall Harvest Crafts Festival</td>
<td>Harvest Celebration and Southern Gospel Jubilee</td>
<td>Oktoberfest</td>
</tr>
<tr>
<td></td>
<td>Annual Garage Sale</td>
<td>Buckley Bash (fun dog contest)</td>
<td>Indian Summer Festival</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Perry Stone Camp Meeting</td>
<td>Art in the Park</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mountain Leadership Conference</td>
<td>Vivaceo! Art festival (annual)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Belz “Safe” Halloween Celebration</td>
<td>Souper Supper</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gatlingurg Craftsmen’s Fair</td>
<td>Ride-A-Thon' South Carolina International Chili Cook-Off</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Annual Wooden Boat Exhibit and Challenge</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grand Strand Fishing Rodeo</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ghostbusting Tour</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Annual North Myrtle Beach Halloween Carnival</td>
</tr>
<tr>
<td><strong>November</strong></td>
<td>Trail of Lights</td>
<td>Annual Award-Winning Pigeon Forge WINTERFEST Kick-Off</td>
<td></td>
</tr>
<tr>
<td>Christmas in Hollister/ Ozark Mountain Xmas</td>
<td>Smoky Mountain Christmas</td>
<td>Smoky Mountain Winterfest/Pigeon Forge Winterfest</td>
<td></td>
</tr>
<tr>
<td>A Veterans Homecoming-Parade &amp; Ceremony</td>
<td>Smoky Mountain Christmas</td>
<td>Celebrate Freedom!</td>
<td></td>
</tr>
<tr>
<td>66th Annual Veterans Day Parade</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Silver DollarCity - An Old Time Christmas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Branson Area Festival of Lights</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>December</strong></td>
<td>Trail of Lights</td>
<td>Smoky Mountain Christmas</td>
<td>Christmas Tour of Homes Throughout the North Strand</td>
</tr>
<tr>
<td>Christmas in Hollister/ Ozark Mountain Xmas</td>
<td>Smoky Mountain Christmas</td>
<td>Smoky Mountain Sports Card and Collectibles Show</td>
<td>Christmas Tour of Homes</td>
</tr>
<tr>
<td>Branson Area Festival of Lights</td>
<td>Smoky Mountain Sports Card and Collectibles Show</td>
<td>Greatest Knife Show on Earth</td>
<td>Beach Ball Classic</td>
</tr>
<tr>
<td>Twelve Days of Christmas</td>
<td>Smoky Mountain Christmas</td>
<td>World's Largest Outlet Extravaganza</td>
<td>Annual Wacca Wache Marina Christmas Boat Parade</td>
</tr>
<tr>
<td>53rd Annual Adoration Parade</td>
<td>Smoky Mountain Christmas</td>
<td>Christmas in the Smokies with the Larkin Family (Bluegrass Festival)</td>
<td>Springmaid Beach Craft Show</td>
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<tr>
<td>National Pearl Harbor Remembrance Day</td>
<td>Smoky Mountain Christmas</td>
<td>Mountain Top Teen Celebration</td>
<td>SCADA North-South All-Star Football Game</td>
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<tr>
<td>Candlelight Christmas</td>
<td>Smoky Mountain Christmas</td>
<td>New Year’s Eve Celebrations</td>
<td></td>
</tr>
<tr>
<td>Silver DollarCity - An Old Time Christmas</td>
<td>Smoky Mountain Christmas</td>
<td>Smoky Mountain Winterfest/Pigeon Forge Winterfest</td>
<td></td>
</tr>
</tbody>
</table>

Source: Chamber of Commerce/CVB, Branson, Pigeon Forge, and Myrtle Beach, and Hamson Price Company
### Table 8-5

**WINTER FESTIVALS & EVENTS IN BRANSON, PIGEON FORGE, AND MYRTLE BEACH**

<table>
<thead>
<tr>
<th>Month</th>
<th>Branson</th>
<th>Pigeon Forge</th>
<th>Myrtle Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>Trail of Lights</td>
<td>WINTERFEST Trolley Tour of Lights</td>
<td>Myrtle Beach Wildlife Exposition</td>
</tr>
<tr>
<td></td>
<td>Hot Winter Fun</td>
<td>Bridgefest Tournament</td>
<td>Lifestyles Expo</td>
</tr>
<tr>
<td></td>
<td></td>
<td>National Fishing Lures Collector's Club Show &amp; Sale</td>
<td>North Myrtle Beach Winter Run</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Annual Wilderness Wildlife Week</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Winter Savings Fest - All Outlet Malls</td>
<td></td>
</tr>
<tr>
<td></td>
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<td>Winter Savings Fest Sidewalk Sale</td>
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<tr>
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<td>Winter Clearance Sale - Pigeon Forge Factory Outlet Mall</td>
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</tr>
<tr>
<td>February</td>
<td>Hot Winter Fun</td>
<td>WINTERFEST Trolley Tour of Lights</td>
<td>Burroughs &amp; Chapin Company Children's Festival</td>
</tr>
<tr>
<td></td>
<td>Celebration of Tastes</td>
<td>Annual Fine Art &amp; Photography Show &amp; Sale</td>
<td>South Carolina Hall of Fame Induction Ceremony</td>
</tr>
<tr>
<td></td>
<td>Vulture Vesture</td>
<td>Sweets for your Sweet</td>
<td>Grand Strand Boat Show and Sale</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Valentine Celebration with the Stars</td>
<td>Myrtle Beach Stamp Show</td>
</tr>
<tr>
<td></td>
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<td>Annual Smoky Mountains Storytelling Festival</td>
<td>National Shag Dance Championships</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Smoky Mountain Jubilee</td>
<td>Home ShowDog Show</td>
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<td></td>
<td></td>
<td>Smoky Mountain Celebration</td>
<td>Myrtle Beach Marathon</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Annual Shindig &amp; Show Revue</td>
<td></td>
</tr>
<tr>
<td>March</td>
<td>Hot Winter Fun</td>
<td>NACMAI Hall of Fame and Awards Show</td>
<td>Annual St. Patrick’s Day Parade and Celebration</td>
</tr>
<tr>
<td></td>
<td>IMAX Film Fest</td>
<td>Annual ‘A Mountain Quiltfest’</td>
<td>National Shag Dance Championship Finals</td>
</tr>
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<td>South Carolina International Chili Cook-off</td>
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<td></td>
<td>Carolina Woman’s Show</td>
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<td></td>
<td>Annual Canadian-American Days Festival</td>
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<td></td>
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<td></td>
<td>Annual Doll Show &amp; Sale</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Annual Georgetown Plantation Tours</td>
</tr>
</tbody>
</table>

Source: Chamber of Commerce/CVB Branson, Pigeon Forge, and Myrtle Beach, and Harrison Price Company.
Beautification and Mini-Parks

It is essential that the visitors to any resort go away with a good impression of the place. Maintenance and repair of all facilities is as important as the way guests are treated by the staff of businesses serving them. It only takes a few uncaring property owners and operators to diminish the visual appeal and ambiance of a resort. HPC recommends that the business community agree on a common set of criteria for maintenance of all properties in areas that receive large amounts of visitor traffic. Enforcement will not be necessary if community pride can be established. However, an environmental control committee should be established, possibly in each district to nudge reluctant owners/operators to comply.

Mini-parks carrying through with the theme of the murals program, but emphasizing sculpture, are recommended for The Strip and other areas. Each would be a small but creative oasis in a sometimes seemingly endless string of roads and parking lots. They could be funded by individual property owners or with available public funds.
APPENDIX A

SUMMERFEST SCHEDULE

June 28 ~ July 8, 2001
<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:30 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Greg Koch's Guitarageddon with Willy Porter</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Streetlife with Warren Wiegratz</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>Swing-O-Matics</td>
</tr>
<tr>
<td>Noon</td>
<td>Lemme Lodge at the Koss Pavilion with CBS 58</td>
<td>The Class of '82 featuring 'The Surf Boys'</td>
</tr>
<tr>
<td>Noon</td>
<td>Potawatom Bingo Casino Stage with Sprecher Brewery</td>
<td>Day Trips</td>
</tr>
<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Emre Brubadors</td>
</tr>
<tr>
<td>Noon</td>
<td>99 WMXY Hyundai Comedy Pavilion</td>
<td>Mark Hayward/Cool Guy</td>
</tr>
<tr>
<td>Noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Potawatom Bingo</td>
</tr>
<tr>
<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>The Orphans</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>103</td>
<td>Movin' To the Music</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Punjab</td>
</tr>
<tr>
<td>1:45 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>The Milwaukee Bucks' Show</td>
</tr>
<tr>
<td>2 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Pat McCurdy</td>
</tr>
<tr>
<td>2 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Children's Health Education Center Program</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Miller Oasis</td>
<td>Grand Studio of the Arts</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Potawatom Bingo Casino Stage with Sprecher Brewery</td>
<td>Cold Sweat &amp; The Brew City Horns</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Hillbilly Voodoo Dolls</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>99 WMXY Hyundai Comedy Pavilion</td>
<td>John Gaertner &amp; Steve Grimm</td>
</tr>
<tr>
<td>2:45 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Senvara, Kathleen Dunbar, Keith Barony, Greg</td>
</tr>
<tr>
<td>3 p.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Andre the Science-Whew</td>
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<tr>
<td>3 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>DJ Razor/Lyric &amp; Cast</td>
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<tr>
<td>3 p.m.</td>
<td>103</td>
<td>Reckless</td>
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<tr>
<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Snooky</td>
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<tr>
<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Milwaukee Bucks' Show</td>
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<tr>
<td>3:30 p.m.</td>
<td>Potawatom Bingo Casino Stage with Sprecher Brewery</td>
<td>The String Benders</td>
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<tr>
<td>3:30 p.m.</td>
<td>99 WMXY Hyundai Comedy Pavilion</td>
<td>Hoppin' in the World Safely</td>
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<tr>
<td>3:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>The Lackloves</td>
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<td>3:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
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<tr>
<td>4:30 p.m.</td>
<td>Miller Oasis</td>
<td>Milwaukee Admirals Hockey</td>
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<tr>
<td>4:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>The Fabulous Feno</td>
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<tr>
<td>5 p.m.</td>
<td>103</td>
<td>CBS 58 News</td>
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<tr>
<td>5 p.m.</td>
<td>Lemme Lodge at the Koss Pavilion with CBS 58</td>
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<tr>
<td>5 p.m.</td>
<td>Lemme Lodge at the Koss Pavilion with CBS 58</td>
<td>Milwaukee Wave Soccer</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Reverend Raven and the Chain Smoking Altar Boys</td>
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<tr>
<td>5 p.m.</td>
<td>Potawatom Bingo Casino Stage with Sprecher Brewery</td>
<td>ComedySportz</td>
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<tr>
<td>5 p.m.</td>
<td>99 WMXY Hyundai Comedy Pavilion</td>
<td>Harmony Riley</td>
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<tr>
<td>5 p.m.</td>
<td>Lemme Lodge at the Koss Pavilion with CBS 58</td>
<td>Nancy Siefert's North Shore Dance Studio</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Toys</td>
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<tr>
<td>5:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Briggs Bluesbusters</td>
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<td>5:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Dave Steffan Band</td>
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<tr>
<td>5:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Wheelchair Sports</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Jake Johannsen</td>
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<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Michael Drake &amp; The No Tail Lines Band</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Morte Skul</td>
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<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>DJ Space &amp; Moana Lisa</td>
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<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Paul Cebnar and the Milwaukeeans</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>David Seebach's Wonders of Magic</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Martin Zellar</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Prince</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Vic Soward and his Swing Band</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>DJ Brian Bzar</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Beach Boys</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Brother 6</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Those Dam Accordionns</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Lice Float</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Jukebox Heroes</td>
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<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Alex Drade &amp; DJ Nu Stlyes</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Short Stuff</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
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<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Sweet Tartis</td>
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<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Cheap Trick</td>
</tr>
<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Freshwater Coils</td>
</tr>
<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>G Love &amp; Special Sauce</td>
</tr>
<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>JJ Wood Quartet</td>
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<tr>
<td>5:45 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Pat McCurdy</td>
</tr>
<tr>
<td>Time</td>
<td>Location</td>
<td>Act</td>
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<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>Christopher's Project</td>
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<td>11:30 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Greg Koch's Guitarmageddon with Paul Cebar</td>
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<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Michael Drake &amp; The No Ton Lines Band</td>
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<tr>
<td>11:30 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Ots &amp; The Alligators</td>
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<tr>
<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>Arden James</td>
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<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mark Hayward/Dool Guy</td>
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<tr>
<td>Noon</td>
<td>Lennie Lodge at the Koos Pavilion with CBS 58</td>
<td>Mudpuppy</td>
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<tr>
<td>Noon</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Pat McCurdy</td>
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<tr>
<td>Noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Children's Health Education Center Program</td>
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<tr>
<td>Noon</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Girish Studio of the Arts</td>
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<tr>
<td>1 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Exhibit A</td>
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<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>In Black N White</td>
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<tr>
<td>1:45 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Jay Stuab</td>
</tr>
<tr>
<td>2 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Miller, Mike Merrifield, Steve Greg, John</td>
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<tr>
<td>2 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Steve Cohen and Jim Liban</td>
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<tr>
<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Andre the Science Whey</td>
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<tr>
<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Al White</td>
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<td>2:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Citizen P</td>
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<tr>
<td>2:30 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Deluxury</td>
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<tr>
<td>2:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Milwaukee Bucks' Show</td>
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<tr>
<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Hoppin' in the World Safely</td>
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<tr>
<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Jeff White</td>
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<tr>
<td>2:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Leap 27</td>
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<tr>
<td>2:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Admirals Hockey</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>The Fabulous Feno</td>
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<tr>
<td>3 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Big Bob and the Ballroom Bitz</td>
</tr>
<tr>
<td>3 p.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>CBS 58 News</td>
</tr>
<tr>
<td>3 p.m.</td>
<td>Milwaukee Oasis</td>
<td>Groove Hogs</td>
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<tr>
<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>King Solomon</td>
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<tr>
<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Wave Soccer</td>
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<tr>
<td>3:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Stall</td>
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<tr>
<td>3:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>ComedySportz</td>
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<tr>
<td>3:30 p.m.</td>
<td>Lennie Lodge at the Koos Pavilion with CBS 58</td>
<td>The Thousands</td>
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<tr>
<td>4 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Truly Remarkable Leon</td>
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<tr>
<td>4 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Wheelchair Sports</td>
</tr>
<tr>
<td>4:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Richard Jen</td>
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<tr>
<td>5 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Bobby Way and the Wayouts</td>
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<tr>
<td>5 p.m.</td>
<td>Lennie Lodge at the Koos Pavilion with CBS 58</td>
<td>Mt Olive</td>
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<tr>
<td>5 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>The Lovelies</td>
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<tr>
<td>5 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Melanie Jane with Mike Hoffman</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mike Carlson</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>David Seibach's Wonders of Magic</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Brian Wilson (opening for Paul Simon)</td>
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<tr>
<td>5:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Jimmy LaFave</td>
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<td>5:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Id's Midificionia</td>
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<tr>
<td>6:15 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Paul Simon (with Brian Wilson opening)</td>
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<tr>
<td>6:30 p.m.</td>
<td>Miller Oasis</td>
<td>Angelique Kups</td>
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<td>6:30 p.m.</td>
<td>Milwaukee Oasis</td>
<td>Del G Audio</td>
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<tr>
<td>7 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Double Trouble</td>
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<tr>
<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Pet Engine</td>
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<tr>
<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Those Darn Accordin's</td>
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<tr>
<td>7 p.m.</td>
<td>Marcus Amphitheater</td>
<td>DJ Nu Stylez &amp; Jordan</td>
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<tr>
<td>7:30 p.m.</td>
<td>Lennie Lodge at the Koos Pavilion with CBS 58</td>
<td>John Kruth</td>
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<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Dr. John</td>
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<tr>
<td>7:30 p.m.</td>
<td>Marcus Amphitheater</td>
<td>Max Prest</td>
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<tr>
<td>8 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>The Gufs</td>
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<tr>
<td>8 p.m.</td>
<td>Klub KISS</td>
<td>Yoga Night with Oso Day &amp; the Knights</td>
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<tr>
<td>8 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Dr. John</td>
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<td>8:30 p.m.</td>
<td>Miller Oasis</td>
<td>Robert G</td>
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<tr>
<td>8:30 p.m.</td>
<td>Miller Oasis</td>
<td>Susan Tedeschi</td>
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<tr>
<td>9 p.m.</td>
<td>Klub KISS</td>
<td>The Violent Femmes</td>
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<tr>
<td>9 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Pat McCurry</td>
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<tr>
<td>10 p.m.</td>
<td>Lennie Lodge at the Koos Pavilion with CBS 58</td>
<td>Baz Markle</td>
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<tr>
<td>Time</td>
<td>Location</td>
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<tr>
<td>a.m.</td>
<td>Master Lock Garden Stage</td>
<td>CDHH African Drum Troupe</td>
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<td>a.m.</td>
<td>Master Lock Garden Stage</td>
<td>OBEAFEST</td>
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<td>a.m.</td>
<td>Tickermaster Legends Stage</td>
<td>Seeger, Janson Klipsaad</td>
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<tr>
<td>a.m.</td>
<td>Miller Classic</td>
<td>Hot Sauce</td>
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<tr>
<td>a.m.</td>
<td>99 WMX Hyundai Comedy Pavilion</td>
<td>with Swing-O-Matics</td>
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<tr>
<td>a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Nashville Pipeline</td>
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<tr>
<td>a.m.</td>
<td>Piggly Wiggly's Mid-Dale Stage</td>
<td>Streetlife with Warren Wegratz</td>
</tr>
<tr>
<td>noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>13 Walls</td>
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<tr>
<td>noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mike Price/Master Juggler</td>
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<tr>
<td>noon</td>
<td>Potawotam Bingo Casino Stage with Sprecher Brewery</td>
<td>Simply Blues</td>
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<tr>
<td>noon</td>
<td>Potawotam Bingo Casino Stage with Sprecher Brewery</td>
<td>The Jamesons</td>
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<tr>
<td>noon</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>The Wonderful World of Wayne &amp; Puppets</td>
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<tr>
<td>noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>CDHH African Drum Troupe</td>
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<tr>
<td>p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Children's Health Education Center Program</td>
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<tr>
<td>p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Milwaukee Rampage</td>
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<td>p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Toy Co, Russian Dancers</td>
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<tr>
<td>p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Rampage</td>
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<tr>
<td>p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Legends of Soul - Uptown Entertainment</td>
</tr>
<tr>
<td>p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Madison County</td>
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<tr>
<td>p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Moon Gypsies</td>
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<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Roy, Patti Vassquez, Tom Walkow, Gvin Gerard</td>
</tr>
<tr>
<td>p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>The Dawgs</td>
</tr>
<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Audire the Science-Whey</td>
</tr>
<tr>
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<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Animal Pharo</td>
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<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Frabees Semi-Finals</td>
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<tr>
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<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Those Good Intentions</td>
</tr>
<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Spanish Dance Troupe</td>
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<td>Hoppin' in the World Safely</td>
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<tr>
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<td>The Boogie Men</td>
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<td>Those Darn Accordion</td>
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<td>George Stancal and The Wonderful Ones</td>
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<td>Little Jimmy &amp; the Blackbirds</td>
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<td>Comedy Sportz</td>
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<tr>
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<td>Truly Remarkable Loon</td>
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<td>Pinky the Juggler</td>
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<td>p.m.</td>
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<td>Poq &amp; the Havana Ducks</td>
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<td>Tracy Morgan</td>
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<td>Torben Floor</td>
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<td>Ebb-N-Paw</td>
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<td>Fruit</td>
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<td>Darrell Yaqui</td>
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<td>Sippin' with Joan Osborne</td>
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<td>David Seabrooks Wonders of Magic</td>
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<td>Briggs Bluesusters</td>
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<td>Hat Trick</td>
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<td>Average White Band</td>
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<td>Deepstar with MC Able</td>
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<td>Lumen &amp; Navaro</td>
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<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Jimmy's Chicken Shack</td>
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<td>Zola</td>
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<td>G 13</td>
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<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Klop</td>
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<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Half &amp; Half Co.</td>
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<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Marshall Dyton</td>
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<td>Kenny Gno</td>
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<td>James Brown</td>
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<td>Billy Gelmar</td>
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<td>Buckhead Zystero</td>
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<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Days of the New</td>
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<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Jessica Andrews</td>
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<tr>
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<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Tower of Power</td>
</tr>
<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Willy Porter</td>
</tr>
<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Dan &amp; Richelle Heller</td>
</tr>
<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Lee Hawkins</td>
</tr>
<tr>
<td>p.m.</td>
<td>Lambe Lodge at the Koss Pavilion with CBS 58</td>
<td>Pat McCurdy</td>
</tr>
</tbody>
</table>
## Appendix A

**SUMMERFEST SCHEDULE, JUNE 28 – JULY 8, 2001**

### Sunday, July 1, 2001

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
</tr>
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<tbody>
<tr>
<td>11 a.m.</td>
<td>Miller Oasis</td>
<td>Pat McGurty</td>
</tr>
<tr>
<td>11 a.m.</td>
<td>Piggy Wiggy’s Mid-Gate Stage</td>
<td>3 Oudies and a Dead Chick</td>
</tr>
<tr>
<td>11 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Borealis</td>
</tr>
<tr>
<td>11 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Mark Pannier &amp; The BB’s</td>
</tr>
<tr>
<td>11 a.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Those Good Intentions-Sarmacana</td>
</tr>
<tr>
<td>noon</td>
<td>Children’s Theater &amp; Playzone</td>
<td>Arden James</td>
</tr>
<tr>
<td>noon</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>Boogie Wonderland</td>
</tr>
<tr>
<td>noon</td>
<td>Master Lock Garden Stage</td>
<td>Hudson</td>
</tr>
<tr>
<td>noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Pogo Joe</td>
</tr>
<tr>
<td>noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Rocket 88</td>
</tr>
<tr>
<td>noon</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Western Box Turtles</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Children’s Theater &amp; Playzone</td>
<td>Movin’ to the Music</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Raising Dragon Martial Arts</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>103</td>
<td>Van Eskes</td>
</tr>
<tr>
<td>1:45 p.m.</td>
<td>Piggy Wiggy’s Mid-Gate Stage</td>
<td>Clark Mix</td>
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<td>Children’s Theater &amp; Playzone</td>
<td>Children’s Health Education Center Program</td>
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<td>Milwaukee Rampage</td>
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<td>Master Lock Garden Stage</td>
<td>Steve Ell Cohen Organ Trio</td>
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<td>Harley-Davidson Roadhouse</td>
<td>Fork &amp; the Havana Ducks</td>
</tr>
<tr>
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<td>Miller Oasis</td>
<td>bicycle</td>
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<td>Clark and Eric O’Shea</td>
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<td>Clark and Eric O’Shea</td>
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<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Clark and Eric O’Shea</td>
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<td>2:30 p.m.</td>
<td>Children’s Theater &amp; Playzone</td>
<td>Andre the Science-Whey</td>
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<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Bunker Hill</td>
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<td>Milwaukee Bombers</td>
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<td>2:30 p.m.</td>
<td>Miller Oasis</td>
<td>Tom Anthony</td>
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<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Hoppin’ in the World Safely</td>
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<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Anne and Jazz Orphan</td>
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<td>Rico</td>
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<td>Children’s Theater &amp; Playzone</td>
<td>Pipe Circus</td>
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<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>The Fabulous Ferno</td>
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<td>Children’s Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
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<td>2:30 p.m.</td>
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<td>Comedy Sportz</td>
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<td>2:30 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>ekootik hookah</td>
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<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>John Paris</td>
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<td>Stokes Aster</td>
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<td>Children’s Theater &amp; Playzone</td>
<td>Riot and Enuff Z Nuff</td>
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<td>Donna Woodall Trio</td>
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<td>Those Darn Accordions</td>
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<td>Apollo Night at Summerfest</td>
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<td>David Seebach’s Wonders of Magic</td>
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<td>Greg Koch and The Boss Controls</td>
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<td>Les Straitjackets</td>
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<td>Streetlife with Warren Wiegratz</td>
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<td>Cammation</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Xsentrix &amp; Mrs. S</td>
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<td>Dave Koz and Friends</td>
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<td>2:30 p.m.</td>
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<td>Woody McBride</td>
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## Appendix A

### SUMMERFEST SCHEDULE, JUNE 28 – JULY 8, 2001

**Monday, July 2, 2001**

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
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<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>Bone Deluxe</td>
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<td>11:30 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Cadillac Kids</td>
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<td>Ticketmaster Legends Stage</td>
<td>Dagenhart, Dave Kasik</td>
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<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Milwaukee Public Theater &quot;The Gift&quot;</td>
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<tr>
<td>Noon</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Rosly Figgers</td>
</tr>
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<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mike PrineCaster Juggler</td>
</tr>
<tr>
<td>Noon</td>
<td>Potawatom Bingo Casino Stage with Sprecher Brewery</td>
<td>Milwaukee Slim Blues Band</td>
</tr>
<tr>
<td>Noon</td>
<td>99 WMVY Hyundai Comedy Pavilion</td>
<td>Potawatomis Bingo</td>
</tr>
<tr>
<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>The Fabulous Feno</td>
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<tr>
<td>noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Tiltown</td>
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<td>Miller Oasis</td>
<td>Jenny Kavanagh</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Movin' to the Music</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Bucks' Show</td>
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<td>The Bettis</td>
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<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Pat McCurdy</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Children's Health Education Center Program</td>
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<td>2 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Grand Studio of the Arts</td>
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<td>Master Lock Garden Stage</td>
<td>Dave Snakey Ray</td>
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<td>Potawatom Bingo Casino Stage with Sprecher Brewery</td>
<td>Paul Black and The Pimp Kings</td>
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<td>99 WMVY Hyundai Comedy Pavilion</td>
<td>Mike Siegel, John DaCesse, Mike Toomey</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Swingerhead</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Andre the Science-Whey</td>
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<td>3 p.m.</td>
<td>Miller Oasis</td>
<td>Charlie Parn</td>
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<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Fire</td>
</tr>
<tr>
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<td>Jasper</td>
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<tr>
<td>3 p.m.</td>
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<td>The Milwaukee Bucks' Show</td>
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<tr>
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<td>Milwaukee Admirals Sports Area</td>
<td>The Rockefellers</td>
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<tr>
<td>3:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Hoppin' in the World Safely</td>
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<tr>
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<td>4 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
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<td>Milwaukee Admirals Hockey</td>
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<tr>
<td>4:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>The Wonderful World of Wayne's Puppets</td>
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<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>CBS 58 News</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>John Brim &amp; the Tough Time Boys</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Mad Trucker Gone Mad</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
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<td>JP &amp; The Cats</td>
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<td>Michael McDermont</td>
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<tr>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Truly Remarkable Loon</td>
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<td>Milwaukee Admirals Sports Area</td>
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<tr>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Will Dust and Deb &amp; Mike</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Swingin' Lovehammers</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Eddie Butts Band</td>
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<td>Katella</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Chuck Howard's Big Band</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Frankie Vega</td>
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<tr>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Destiny's Child with Stacie Orno and True Vibe</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>David Seebach's Wonders of Magic</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>North Mississippi Allstars</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Road Trip</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Steve Cohen Band and The Rocos</td>
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<td>Bad Boy</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Birky Tuney &amp; The Fairland Chokernd</td>
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<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Danny the Wildchild</td>
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<td>Those Damn Accordions</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Mixon Marc</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Pamela Means</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Seven Mary Three</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Three Dog Night</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Paul Anthony</td>
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<td>Slash's Snakepit</td>
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<td>Milwaukee Admirals Sports Area</td>
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<td>8 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Pat McCurdy</td>
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<td>8 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Naw-T-Boy</td>
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<tr>
<td>Time</td>
<td>Location</td>
<td>Act</td>
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<tr>
<td>11:30 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Catch A Wave</td>
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<td>Ticketmaster Legends Stage</td>
<td>Greg Koch's Guitarmageodilon with Bill Stone</td>
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<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>Lynne Jordan and the Shivers</td>
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<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Those Darn Accordions</td>
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<tr>
<td>Noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Big Poppa Boggie</td>
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<tr>
<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>Folk Songs and Foulery with Dan Monnier</td>
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<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mike Price/Jester Juggler</td>
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<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Potawatomi Bingo</td>
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<td>Noon</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Potawatomi Bingo</td>
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<tr>
<td>Noon</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>The Etiquette</td>
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<tr>
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<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
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<td>noon</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
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<td>1 p.m.</td>
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<tr>
<td>1 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Move'n to the Music</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>The Milwaukee Bucks' Show</td>
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<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Pat McCurdy</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>EnergizedMilwaukee Bucks' Dance Team</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
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<td>Master Lock Garden Stage</td>
<td>Sigmund Snoppe</td>
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<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Southbound</td>
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<td>2:30 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
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<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
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<td>7:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
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<td>2:45 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
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<td>Ticketmaster Legends Stage</td>
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<td>Miller Oasis</td>
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<td>3 p.m.</td>
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<tr>
<td>3:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Hoppin' in the World Safely</td>
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<tr>
<td>3:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>ManPlanet</td>
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<tr>
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<td>Milwaukee Admirals Sports Area</td>
<td>Streetlife with Warren Weggratz</td>
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<td>4:30 p.m.</td>
<td>5 p.m. Milwaukee Admirals Sports Area</td>
<td>The Wonderful World of Wayne Puppets</td>
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<tr>
<td>5:00 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Barry's Truckers</td>
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<td>5 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>CBS 58 News</td>
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<td>5 p.m.</td>
<td>103</td>
<td>Fiercely Me</td>
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<tr>
<td>5 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Little Jimmy &amp; the Blackbirds</td>
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<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Wave Soccer</td>
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<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Davis Family</td>
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<td>5 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>ComedySportz</td>
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<td>5 p.m.</td>
<td>Marcus Amphitheater</td>
<td>Arden James</td>
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<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Lucky Boy's Confusion</td>
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<td>5 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Innocent Criminals</td>
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<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Wheelchair Sports</td>
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<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Jeff Cesano</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Brother</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Love Monkeys</td>
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<td>Spiral Trance</td>
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<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Colin O'Brien</td>
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<td>6:15 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Pootree Chicago featuring ZZ releases</td>
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<td>David Seebach's Wonders of Magic</td>
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<td>103</td>
<td>Benjamins</td>
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<td>Master Lock Garden Stage</td>
<td>Laurie Smith and Dazzle</td>
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<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Monovox</td>
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<tr>
<td>7 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Wisconsin's Own - The Tom Green Show</td>
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<td>7:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Baby Boy</td>
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<td>7:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>The Buzzard</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td>Michelle Malone and the Peep Show Band</td>
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<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>John Kruhl</td>
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<td>8 p.m.</td>
<td>Klub KISS</td>
<td>Marked with McCrow</td>
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<td>Monster Magnet</td>
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<td>Real Big Fish</td>
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<tr>
<td>9:30 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>The Cult</td>
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<td>9:30 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Wiscon</td>
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<td>9 p.m.</td>
<td>Klub KISS</td>
<td>DJ Rock Dee with Verbal High</td>
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<td>10 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Legends of Rock 'n' Roll Impersonator Show</td>
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<td>10 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Mondo Day &amp; the Time</td>
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<td>Miller Oasis</td>
<td>Pat McCurdy</td>
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<tr>
<td>10 p.m.</td>
<td>Klub KISS</td>
<td>Steven Kay</td>
</tr>
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</table>
### Appendix A

**SUMMERFEST SCHEDULE, JUNE 28 – JULY 8, 2001**

#### Wednesday, July 4, 2001

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
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<tbody>
<tr>
<td>11:30 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Hanson</td>
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<td>Harley-Davidson Roadhouse</td>
<td>KG Williams &amp; the Big Dawgs</td>
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<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>The Doctors</td>
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<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>The Toys</td>
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<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>Ardon James</td>
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<tr>
<td>Noon</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Big Nick and The Cydecos</td>
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<tr>
<td>Noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Lit Me and The TKO Band</td>
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<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Pogo Joe</td>
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<tr>
<td>Noon</td>
<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Potawatomi Bingo</td>
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<tr>
<td>Noon</td>
<td>Legion Lodge at the Kosse Pavilion with CBS 58</td>
<td>The Uptown Savages</td>
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<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>&quot;Carl the Truth&quot; Love</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Cyclesomething</td>
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<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Move'n to the Music</td>
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<td>1:45 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Pat McMurtry</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Rampage</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
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<td>Master Lock Garden Stage</td>
<td>Amy Rehan</td>
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<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Deidre Fellner &amp; the Whole of Soul</td>
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<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Ila Adenra</td>
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<td>2:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Luck of the Draw</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Streethow, Rob Brackenridge, Mike Ostrowski</td>
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<td>3 p.m.</td>
<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Andre the Science-Whey</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Joe Busher &amp; the Top Raiders</td>
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<td>3 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Mark Hayward - Cool Guy</td>
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<td>Plankentorn &amp; Ferrara</td>
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<td>Children's Theater &amp; Playzone</td>
<td>Hoppin' in the World Safely</td>
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<td>3:30 p.m.</td>
<td>Legion Lodge at the Kosse Pavilion with CBS 58</td>
<td>Joe D'Unso and Stone Caravan</td>
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<td>4 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Johnny Sparkle and the Do-Wop Daddies</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Admirals Hockey</td>
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<td>Children's Theater &amp; Playzone</td>
<td>The Fabulous Feno</td>
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<td>5 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Black Earth Plus-DuJom</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>CBS 58 News</td>
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<td>5 p.m.</td>
<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Larry Lynn and the Bootleggers</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Wave Soccer</td>
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<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Orchestra Veneno</td>
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<td>5:45 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Suite 13</td>
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<td>6:15 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>ComedySports</td>
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<td>Milwaukee Oasis</td>
<td>Creepy Crawler Zoo</td>
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<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Sonny Landinich</td>
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<td>7 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>John Witherspoon</td>
</tr>
<tr>
<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Brother</td>
</tr>
<tr>
<td>7 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Rhythm Method</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Skrapé</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>David Seebach's Wonders of Magic</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>DJ Don</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Peter Mulvey</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Marcus Amphitheater</td>
<td>Dark Star Orchestra</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Tom Petty and the Heartbreakers, Jackson Browne</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Barbanito Torres (from Buena Vista Social Club)</td>
</tr>
<tr>
<td>8 p.m.</td>
<td>Klub KISS</td>
<td>Christopher's Project</td>
</tr>
<tr>
<td>8 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Janes Amato</td>
</tr>
<tr>
<td>8 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Karaoke Night</td>
</tr>
<tr>
<td>8 p.m.</td>
<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Steve Earle &amp; The Dukes</td>
</tr>
<tr>
<td>8 p.m.</td>
<td>103</td>
<td>You're Pretty</td>
</tr>
<tr>
<td>8:30 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Those Dam Accordions</td>
</tr>
<tr>
<td>9 p.m.</td>
<td>Klub KISS</td>
<td>Dayhola</td>
</tr>
<tr>
<td>9 p.m.</td>
<td>Miller Oasis</td>
<td>Mrs. Fun</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Cameo</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Ongstar with Keanu Reeves</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Stabbing Westward</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Klub KISS</td>
<td>Cubanismo</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>99 WMGY Hyundai Comedy Pavilion</td>
<td>Derrick Carter</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>103</td>
<td>Pet McMurdy</td>
</tr>
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</table>
### Appendix A

**SUMMERFEST SCHEDULE, JUNE 28 – JULY 8, 2001**

**Thursday, July 5, 2001**

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>Doll House</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Funhouse</td>
</tr>
<tr>
<td>11:40 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Cohen and Peter Roller</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Michael Drake &amp; The No Tan Lines Band</td>
</tr>
<tr>
<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>Folk Songs and Foolery with Can Money</td>
</tr>
<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mike Price/Master Juggler</td>
</tr>
<tr>
<td>Noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Oil Can Harry</td>
</tr>
<tr>
<td>Noon</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Potawatomi Bingo</td>
</tr>
<tr>
<td>Noon</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>The Recovery Project</td>
</tr>
<tr>
<td>Noon</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Willie Higgins &amp; The Mob</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Movin' to the Music</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>103</td>
<td>The Edge</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Milwaukee Bucks' Show</td>
</tr>
<tr>
<td>1:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Xotchey</td>
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<tr>
<td>1:45 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Pat McCready</td>
</tr>
<tr>
<td>2 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Steve Jennings</td>
</tr>
<tr>
<td>2 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Eric Lugosch</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Pete Christensen, Jim McHugh, Joe Anthony</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>The Booze Brothers</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>The Westade Andy / Mel Ford Band</td>
</tr>
<tr>
<td>2:45 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Andre the Science-Whey</td>
</tr>
<tr>
<td>3 p.m.</td>
<td>103</td>
<td>Battlestar Gallatekstan</td>
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<tr>
<td>3 p.m.</td>
<td>Miller Oasis</td>
<td>Groove Hogs</td>
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<tr>
<td>3 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Kyxx</td>
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<tr>
<td>3 p.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Random Maxx</td>
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<tr>
<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Milwaukee Bucks' Show</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Hoppin' in the World Safely</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>Yel Leaders</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Admirals Hockey</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Those Darn Accordions</td>
</tr>
<tr>
<td>4 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>CBS 58 News</td>
</tr>
<tr>
<td>4 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Stubbiefield</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>Kickstand</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Wave Soccer</td>
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<tr>
<td>5 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>The Seikus</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>ComedySportz</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Brother</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Cherry Pie</td>
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<tr>
<td>5 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Wheelchair Sports</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Lewis Black</td>
</tr>
<tr>
<td>5:30 p.m.</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>Fabulous Feno &amp; The Last Transaction</td>
</tr>
<tr>
<td>5:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Break Dancers</td>
</tr>
<tr>
<td>5:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Short Stuff</td>
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<tr>
<td>6 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Spirit Creek</td>
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<tr>
<td>6 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Chuck Howard's Big Band</td>
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<tr>
<td>6:15 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Peter and the Nightcraws</td>
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<tr>
<td>6:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>American English</td>
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<tr>
<td>6:30 p.m.</td>
<td>Miller Oasis</td>
<td>Mr. Bill</td>
</tr>
<tr>
<td>6:30 p.m.</td>
<td>103</td>
<td>Suzanne Granna</td>
</tr>
<tr>
<td>7 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Hay of Men at Work</td>
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<tr>
<td>7 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>SONAAdada</td>
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<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Vicious Vic</td>
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<td>7:30 p.m.</td>
<td>Marcus Amphitheater</td>
<td>Mighty Blue Kings</td>
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<td>7:30 p.m.</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td>Samsonic</td>
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<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Charlie Musselwhite</td>
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<td>7:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Tesla</td>
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<td>Klub KISS</td>
<td>Pat McCurdy</td>
</tr>
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<td>8 p.m.</td>
<td>103</td>
<td>DJ Craze &amp; DJ Infamous</td>
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<td>8 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
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<td>9 p.m.</td>
<td>Ticketmaster Legends Stage</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
<td></td>
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<tr>
<td>10 p.m.</td>
<td>Miller Oasis</td>
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<tr>
<td>10 p.m.</td>
<td>Leine Lodge at the Koss Pavilion with CBS 58</td>
<td></td>
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<tr>
<td>10 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
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<tr>
<td>10 p.m.</td>
<td>103</td>
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<tr>
<td>11:30 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
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<tr>
<td>11:30 p.m.</td>
<td>Klub KISS</td>
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</tbody>
</table>
Appendix A

SUMMERFEST SCHEDULE, JUNE 28 – JULY 8, 2001

Friday, July 6, 2001

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:30 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Greg Koch's Gustarmageddon with Scott Finch</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Lisa G &amp; Montage</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Spiffs</td>
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<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>World Class Noise</td>
</tr>
<tr>
<td>noon</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Fall Out</td>
</tr>
<tr>
<td>noon</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Little Cedar</td>
</tr>
<tr>
<td>noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mambo Surfers</td>
</tr>
<tr>
<td>noon</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Mark Preston</td>
</tr>
<tr>
<td>Noon</td>
<td>Children's Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>103</td>
<td>Big Bang</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Movin' to the Music</td>
</tr>
<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>The Milwaukee Bucks' Show</td>
</tr>
<tr>
<td>1:15 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Pat McCurdy</td>
</tr>
<tr>
<td>2 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Capoeira</td>
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<tr>
<td>2 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Children's Health Education Center Program</td>
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<tr>
<td>2:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Cressfire</td>
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<td>2:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Nubi</td>
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<tr>
<td>2:30 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Peter Roller and Fred Bifert</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Monica Carter, Joe Bardelli, Larry Reeb</td>
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<tr>
<td>2:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>The Blue Olives</td>
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<td>2:45 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Andre the Science-Whey</td>
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<tr>
<td>3 p.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Dave Fitzpatrick</td>
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<td>3 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Mad Campers</td>
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<tr>
<td>3 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>The Milwaukee Bucks' Show</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Miller Oasis</td>
<td>Hoppin' in the World Safely</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Light up - A Styx Tribute</td>
</tr>
<tr>
<td>4 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Spangle-makers</td>
</tr>
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<td>4 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Bumpus</td>
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<tr>
<td>4 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Milwaukee Admirals Hockey</td>
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<tr>
<td>4:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>The Fabulous Feno</td>
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<tr>
<td>5 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>CBS 58 News</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Great Guns</td>
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<td>5 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Kill Hannah</td>
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<td>5 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Koy</td>
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<tr>
<td>5 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Milwaukee Wave Soccer</td>
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<tr>
<td>5 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Terry Sims</td>
</tr>
<tr>
<td>5 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>ComedySportz</td>
</tr>
<tr>
<td>5:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Annie Minogue</td>
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<tr>
<td>5:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Gloria Hays and Family Folk Songs</td>
</tr>
<tr>
<td>6 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Wheelchair Sports</td>
</tr>
<tr>
<td>6 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Rene Hcks</td>
</tr>
<tr>
<td>6 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Those Darn Accordions</td>
</tr>
<tr>
<td>6:30 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Bobby Friss Band</td>
</tr>
<tr>
<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Break Dancers</td>
</tr>
<tr>
<td>7 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Rosal</td>
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<tr>
<td>7 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Chad Summer</td>
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<tr>
<td>7:30 p.m.</td>
<td>Marcus Amphitheater</td>
<td>David Seebach's Wonders of Magic</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Frogwater</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>3 Doors Down with Lifehouse and Tarveric opening</td>
</tr>
<tr>
<td>7:30 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Aswah Greggon</td>
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<tr>
<td>7:30 p.m.</td>
<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Bands</td>
</tr>
<tr>
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<td>Milwaukee Admirals Sports Area</td>
<td>Daryl Stuemer</td>
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<tr>
<td>8 p.m.</td>
<td>Klub KISS</td>
<td>Rusty PC</td>
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<td>8 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Charles Little</td>
</tr>
<tr>
<td>8 p.m.</td>
<td>103</td>
<td>Karaoke Night</td>
</tr>
<tr>
<td>9 p.m.</td>
<td>Prime STH</td>
<td>Prime STH</td>
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<tr>
<td>9 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Streetlife with Warren Wegraz</td>
</tr>
<tr>
<td>9 p.m.</td>
<td>Klub KISS</td>
<td>Bear Who?</td>
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<tr>
<td>10 p.m.</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>Piper Road Spring Band</td>
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<td>10 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Pam Tillis</td>
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<td>10 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Salva</td>
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<tr>
<td>10 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>&quot;An Evening of Guitars and Saxs&quot;</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Klub KISS</td>
<td>Black Eyed Peas</td>
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<tr>
<td>10 p.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Pevar</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Fear: Kult</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>John Curley</td>
</tr>
<tr>
<td>10 p.m.</td>
<td>Klub KISS</td>
<td>Pat McCrudy</td>
</tr>
</tbody>
</table>
### Appendix A

**SUMMERFEST SCHEDULE, JUNE 28 – JULY 8, 2001**

#### Saturday, July 7, 2001

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Act</th>
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<tbody>
<tr>
<td>8:30 a.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Footin' it for Family Health</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Ticketmaster Legends Stage</td>
<td>Steve Grimm</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Johnny Wad</td>
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<tr>
<td>11:30 a.m.</td>
<td>Miller Oasis</td>
<td>Mercury Mayhem</td>
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<tr>
<td>11:30 a.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Streetlife with Warren Wiegratz</td>
</tr>
<tr>
<td>noon</td>
<td>Potawatomi Bingo Casino Stage with Spracher Brewery</td>
<td>Billy Flynn Blues Band</td>
</tr>
<tr>
<td>noon</td>
<td>Briggs &amp; Stratton Backyard</td>
<td>Clearer</td>
</tr>
<tr>
<td>Noon</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>DJ Razor/Lyric &amp; Cast</td>
</tr>
<tr>
<td>Noon</td>
<td>Lene Lodge at the Koss Pavilion with CBS 58</td>
<td>Elmbrook Spiders</td>
</tr>
<tr>
<td>Noon</td>
<td>Master Lock Garden Stage</td>
<td>Manty Ellis</td>
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<tr>
<td>Noon</td>
<td>Milwaukee Admirals Sports Area</td>
<td>Summerfest Weightlifting/Bodybuilding Competition</td>
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<tr>
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<td>Children's Theater &amp; Playzone</td>
<td>Truly Remarkable Loon</td>
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<tr>
<td>1 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Black Party</td>
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<tr>
<td>1:45 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Move 'n the Music</td>
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<tr>
<td>2 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Pat McCurdy</td>
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<tr>
<td>2 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Berkeley Fudge</td>
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<tr>
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<td>Potawatomi Bingo Casino Stage with Spracher Brewery</td>
<td>Children's Health Education Center Program</td>
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<td>Briggs &amp; Stratton Backyard</td>
<td>Brint Anderson</td>
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<td>Mark Shuvilla &amp; the Greatest Hits</td>
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<td>Harley-Davidson Roadhouse</td>
<td>Mike Burton, Rob Little, Gary Valentine</td>
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<td>Andre the Science-Whey</td>
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<td>3 p.m.</td>
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<td>Alisa Left</td>
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<td>Briggs &amp; Stratton Backyard</td>
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<td>3:30 p.m.</td>
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<td>Anthony Vincent</td>
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<td>4 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Bobby Fiss Band</td>
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<td>Briggs &amp; Stratton Backyard</td>
<td>Hoppin' in the World Safely</td>
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<tr>
<td>4 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Bonfoss Quartet</td>
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<td>Epic Hero</td>
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<td>Harley-Davidson Roadhouse</td>
<td>Julie Sobanski, The Princess of Magic</td>
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<td>5 p.m.</td>
<td>Lene Lodge at the Koss Pavilion with CBS 58</td>
<td>Bluebird</td>
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<td>Potawatomi Bingo Casino Stage with Spracher Brewery</td>
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<td>Briggs &amp; Stratton Backyard</td>
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<td>Spike Sattford</td>
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<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>The Sociables</td>
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<td>Lene Lodge at the Koss Pavilion with CBS 58</td>
<td>ComedySportz</td>
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<tr>
<td>6:30 p.m.</td>
<td>Briggs &amp; Stratton Backyard</td>
<td>Gloria Hays &amp; Family Folk Songs</td>
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<td>Miller Oasis</td>
<td>Porcine</td>
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<td>7 p.m.</td>
<td>Klub KISS</td>
<td>Chris Barnes and Preacher Moss</td>
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<td>7 p.m.</td>
<td>Master Lock Garden Stage</td>
<td>Eric Gates</td>
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<td>7:30 p.m.</td>
<td>Marcus Amphitheater</td>
<td>Scott E. Berendt and The Us Project</td>
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<td>7:30 p.m.</td>
<td>Children's Theater &amp; Playzone</td>
<td>Tourniquet</td>
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<td>7:30 p.m.</td>
<td>Briggs &amp; Stratton Backyard</td>
<td>Mayfield 4</td>
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<td>Harley-Davidson Roadhouse</td>
<td>Michael Wenz</td>
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<td>8 p.m.</td>
<td>Potawatomi Bingo Casino Stage with Spracher Brewery</td>
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<td>8 p.m.</td>
<td>Briggs &amp; Stratton Backyard</td>
<td>Tim McGraw with Kenny Chesney</td>
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<tr>
<td>8 p.m.</td>
<td>Lene Lodge at the Koss Pavilion with CBS 58</td>
<td>David Seebach's Wonders of Magic</td>
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<td>8 p.m.</td>
<td>Harley-Davidson Roadhouse</td>
<td>Framing Amy</td>
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<td>Children's Theater &amp; Playzone</td>
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<td>Miller Oasis</td>
<td>Anna Fenning's Trigger Gospel</td>
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<tr>
<td>9 p.m.</td>
<td>Piggly Wiggly's Mid-Gate Stage</td>
<td>Diffuser</td>
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<td>9:15 p.m.</td>
<td>Klub KISS</td>
<td>American Hi-Fi</td>
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<tr>
<td>10 p.m.</td>
<td>Lene Lodge at the Koss Pavilion with CBS 58</td>
<td>Big Nick and The Cydcoons</td>
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<td>10 p.m.</td>
<td>Briggs &amp; Stratton Backyard</td>
<td>Recycled Future</td>
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<td>10 p.m.</td>
<td>Miller Oasis</td>
<td>Dan Doornhouse</td>
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<td>10 p.m.</td>
<td>Klub KISS</td>
<td>Jayhawks</td>
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<tr>
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<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Love Monkeys</td>
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<td>Miller Oasis</td>
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<td>Klub KISS</td>
<td>Doobie Brothers</td>
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<td>Everclear</td>
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<td>Klub KISS</td>
<td>John Hawley &amp; DeVinci</td>
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<td>Klub KISS</td>
<td>Pat McCurdy</td>
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<tr>
<td>10 p.m.</td>
<td>Klub KISS</td>
<td>Electric Delicate</td>
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<td>Time</td>
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<tr>
<td>a.m.</td>
<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Adopt a Musician</td>
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<td>Harley-Davidson Roadhouse</td>
<td>Alan Road Band</td>
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<td>Piggy Wiggly’s Mid-Gate Stage</td>
<td>Benny and the Jets</td>
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<td>Ticketmaster Legends Stage</td>
<td>Perry Weber</td>
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<td>Miller Oasis</td>
<td>Pat McCurdy</td>
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<tr>
<td>noon</td>
<td>Briggs &amp; Stratton Big Backyard</td>
<td>First ’n Gold</td>
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<td>Master Lock Garden Stage</td>
<td>Generations In Jazz</td>
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<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Jazzercize</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Mike Price - Master Juggler</td>
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<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Mural Ceyell</td>
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<tr>
<td>noon</td>
<td>Children’s Theater &amp; Playzone</td>
<td>Truly Remarkable Loops</td>
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<tr>
<td>1 p.m.</td>
<td>Milwaukee Admirals Sports Area</td>
<td>“Carl the Truth” love</td>
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<td>103</td>
<td>Atomic Number 9</td>
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<tr>
<td>1 p.m.</td>
<td>Children’s Theater &amp; Playzone</td>
<td>Mover to the Music</td>
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<td>Piggy Wiggly’s Mid-Gate Stage</td>
<td>Drowning Star</td>
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<td>Milwaukee Admirals Sports Area</td>
<td>Children’s Health Education Center Program</td>
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<td>Potawatomi Bingo Casino Stage with Sprecher Brewery</td>
<td>Long Way Round</td>
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<td>Milwaukee Rampage</td>
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<td>Briggs &amp; Stratton Big Backyard</td>
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<td>99 WMYX Hyundai Comedy Pavilion</td>
<td>Five Guys with Day Jobs</td>
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<td>Lennie Lodge at the Koss Pavilion with CBS 58</td>
<td>Greg Gerhard Band</td>
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<td>Mark Schneider, Diane Alaming, Hugh</td>
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<td>3:00 p.m.</td>
<td>103</td>
<td>Tim Mahoney</td>
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<td>Children’s Theater &amp; Playzone</td>
<td>Andre the Science-Whey</td>
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<td>Knock on Wood</td>
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<td>Ron Lasalle &amp; the Eastside Rockers</td>
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<td>CBS 58 News</td>
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<td>Julie Sobansky, Princess of Magic</td>
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<td>Heart Demonstration</td>
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<td>David Seebach’s Wonders of Magic</td>
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<td>DJ Rock Dee</td>
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<td>John C. Reilly</td>
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<td>3:30 p.m.</td>
<td>103</td>
<td>Charles Green</td>
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| 3:30 p.m.| 103                                                                       |</code>