Engaging Lapsed, Casual, and First-Time Audience Members

Wed, June 1 | League of American Orchestras Conference 2022

Presented by

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Client Engagement Officer
What is a Symphony?
“Stay home” during weekend preference
End of year 2021

% indicating preference

<table>
<thead>
<tr>
<th>Year</th>
<th>US composite</th>
<th>High-propensity visitors</th>
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<tbody>
<tr>
<td>2011</td>
<td>28.6%</td>
<td>29.5%</td>
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<tr>
<td>2012</td>
<td>37.7%</td>
<td>31.5%</td>
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<tr>
<td>2013</td>
<td>41.5%</td>
<td>33.4%</td>
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<tr>
<td>2014</td>
<td>42.3%</td>
<td>33.9%</td>
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<tr>
<td>2015</td>
<td>45.0%</td>
<td>35.6%</td>
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<tr>
<td>2016</td>
<td>45.5%</td>
<td>36.2%</td>
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<tr>
<td>2017</td>
<td>46.9%</td>
<td>38.6%</td>
</tr>
<tr>
<td>2018</td>
<td>47.5%</td>
<td>44.1%</td>
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<tr>
<td>2019</td>
<td>49.0%</td>
<td>45.8%</td>
</tr>
<tr>
<td>2020</td>
<td>+42.4%</td>
<td>53.1%</td>
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<tr>
<td>2021</td>
<td>+60.1%</td>
<td>53.7%</td>
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Disruptive,
data-driven,
change agency.
Agenda

- Data Dive
- Examples from the Field
- Empathy Mapping
- Questions and Discussion
COVID-19 Sector Benchmark

Real-time intelligence on the impact of our changing world

Understand how you compare to an industry leading benchmark of over 400 organizations across the North America, the UK and Ireland.

Join The Free Benchmark
Login Now To See Your Data

In Partnership

This project is supported in part by the National Endowment for the Arts through our partnership with SMU DataArts.
TRG Data Corner - Orchestras
Tickets Sold in NA

-6% Revenue
-24% Units
Ticket Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Orchestras

[Graph showing ticket units and revenue for NA Orchestras over the last 12 months and pre-pandemic periods, with data points for each month from June 2018 to May 2022.]
Typology

Segmentation by loyalty.
**Customer Typology**

Segment Definitions – **Think RFMG**

<table>
<thead>
<tr>
<th>Acquisition</th>
<th>• New Customer – had not transacted previously</th>
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<tbody>
<tr>
<td>Current Customers</td>
<td>• Once Before – once before within the past 18 months</td>
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<tr>
<td></td>
<td>• Convertee – twice before and at least one within the past 18 months</td>
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<tr>
<td></td>
<td>• Active – 3-9 times in their history and at least once in the past 18 months</td>
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<tr>
<td></td>
<td>• Super Active – 10+ times in their history and at least once in the past 18 months</td>
</tr>
<tr>
<td>Re-Engaged</td>
<td>• Stale – last attendance, prior to most recent purchase, was 18-36 months ago</td>
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<tr>
<td></td>
<td>• Lapsed – last attendance, prior to most recent purchase, was 3 years or more ago</td>
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</tbody>
</table>
Ticket Sales by Typology – May 2022
NA Orchestras

- New Customers: 24%
- Once Before: 13%
- Convertee: 7%
- Active: 4%
- Super Active: 7%
- Stale: 6%
- Lapsed: 7%
- Total: 39%
Patron Participation

Is it growing? Is it flat or even declining?
Patron Participation
How to analyze

Total all trackable transactions & 7 years of activity year-by-year = Patron Participation
Single Tickets

Units

Orch 1  Orch 2  Orch 3  Orch 4  Orch 5  Orch 6  Orch 7  Orch 8  Orch 9

Subscriptions

Units

- 30,000
- 25,000
- 20,000
- 15,000
- 10,000
- 5,000
- 0


Orch 1  Orch 2  Orch 3  Orch 4  Orch 5  Orch 6  Orch 7  Orch 8  Orch 9  Orch 10
Patron Participation and Revenue

Why It is Important

• Individuals who engage in multiple ways are more loyal to an organization (“stickier”)

• A healthy organization should have growing engagement
Ticket Conversion

Are ticket buyers upgrading?
TRG Data Corner
Single Ticket Unit Sales – Year-over-Year Changes
25 Seasons: 2015-16 thru 2018-19

Seasons with Growth

13
52%

Seasons with Decline

12
48%
TRG Data Corner
Subscription Conversion
From 13 Seasons of Single Ticket Growth

3
23%
Seasons with Growth

10
77%
Seasons with Decline
Ticket Conversion

Why it is important

• Subscribers spend more, have higher renewal rates and a lower cost-of-sale over time
• Subscription is a critical loyalty step toward philanthropy
IT TAKES 21 DAYS TO FORM A HABIT
Pre-Pandemic Worries

Generational Shifts
Racial Make-Up of Attendees
Engaging with Community
Filling out Pipelines
Percentage of Arts Patrons by Generation

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</thead>
<tbody>
<tr>
<td>The Silent Generation</td>
<td>23%</td>
<td>22%</td>
<td>21%</td>
<td>20%</td>
<td>19%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>The Baby Boomer Generation</td>
<td>45%</td>
<td>45%</td>
<td>45%</td>
<td>45%</td>
<td>44%</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Generation X</td>
<td>22%</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
<td>25%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>The Millennial Generation</td>
<td>7%</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
<td>11%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Generation Z</td>
<td>0.05%</td>
<td>0.04%</td>
<td>0.06%</td>
<td>0.07%</td>
<td>0.09%</td>
<td>0.12%</td>
<td>0.20%</td>
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</tbody>
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Ticket Sales

“Must Have” is a Gen X Strategy
Ticket Sales by Generation – 2019 vs 2020 vs 2021

NA Orchestras
Ticket Sales by Ethnicity – 2021 vs 2020 vs 2019

NA Orchestras

![Bar chart showing ticket sales by ethnicity for 2021, 2020, and 2019 for NA orchestras. The chart compares White/Other, Hispanic, Black, and Asian categories.](chart_image)
Churn
65%  Single Ticket Audiences are NEW
73% NEVER RETURN
Churn Causes

Experience Problems
We didn’t ask, didn’t listen, and didn’t follow-up

Wrong Invitation
Overwhelmed, tried to “instantpot”, didn’t appeal, and wrong matchmaking
Points of dissatisfaction for Atlanta arts buyers

1. Parking

2. Website
Reduce Churn

In a relationship

• **Goal:** get first-time and recovered attendees to repeat their purchase
  - Gather feedback, how was their experience? Address problems
  - Must be an immediate invitation to return
  - Introduce digital as a way to maintain relationship

• **Engage them in other ways as appropriate, encourage future multi-buying behavior**
  - Special events
  - Pre- and post-activities
  - Add-on experiences
Net Promoter Score® (NPS®)
How likely is it that you would recommend ____ to a friend or colleague?

Not at all likely  Neutral  Extremely likely

1  2  3  4  5  6  7  8  9  10
Detractor  Passive  Promoter

% of Promoters – % of Detractors = NPS
TRG Field Survey

Are we listening?

- NPS surveyors: 58% ask after every concert, production, exhibit
- 25% in touch with negative open-ended feedback
- 15% in touch with positive open-ended feedback
- 15% in touch with Detractors in general
- 4% in touch with Passives in general
- 5% in touch with Promoters
The Broadway Patron is purchasing more on their phone.

The percentage of people in the pre-March 2020 audience who purchased via mobile was 36% whereas post-August 2021 it increased to 52%.
What’s Motivating…

- Goal-oriented ACTION.
- Responsive and empathetic.
- Implementation.
- Use of data – to define need and measure success.
Ticket buyers are more likely to attend if they received marketing focused on the emotions of the event, rather than the details, especially if they weren’t familiar with the composer or piece.
Empathy

Experiencing the feelings of another

You have similar personal experiences

Emotion

Sympathy

Understanding the suffering of another

You acknowledge another’s circumstances

Recognition
Virginia Symphony Orchestra
Inventory for Audience Building
APPROACH

• “Second Century Audiences Initiative”
• Allocate inventory specifically for Audience Building
• 40-80 seats depending on venue
• Sold by invitation
• Entry level pricing: $20-$25
The Music of the Bee Gees
Adam Turner, conductor

This show offers all of the band’s #1 hits from “Stayin’ Alive” to “Night Fever” with an exciting array of their early works.

Tchaikovsky
Symphony No. 4
February 18
February 19
February 20

Welcome new VSO Principal Guest Conductor and Norfolk native Thomas Wilkins leading the VSO in Tchaikovsky’s Symphony No. 4, featuring the VSO’s explosive brass and wind sections. You’ll never hear a more powerful work of music!

“Uptown Nights”
Byron Stripling, conductor and trumpet
Carmen Bradford, vocalist
Leo Manzi, tenor saxophone

Tickets start at $25
Special offers available!
Contact our Sales Manager Brooke Barnes, at 757.391.2429 or tickets@virginiasymphony.org
George Street Playhouse
A Home for New Work
Test to Craft the Message

• Digital Ads as a Learning Lab
  - Early in selling cycle with multiple messages
  - Track which messages and storylines are generating the most engagement

• Movie Trailer Approach
  - Conveys experience
  - Not worried about the plot
  - Must pass the “sound off” test
EMPATHY MAP Example (Buying a TV)

SAYS
- I was expecting something different
- What do you think?
- Where should I start?
- What size is best?
- What brand do you like?
- Why is this so hard?
- What else am I missing?
- Why is this wasting too much time?
- I want something awesome
- Maybe this isn’t the best

THINKS
- Do they think I’m stupid?
- What is best for me?
- Too many acronyms

DOES
- I want something reliable
- Checks the website
- Lists pros/cons
- More research
- Compares products
- Overwhelmed
- Excited
- Inadequate

FEELS
- Postpones big decisions
- Makes small decisions
- Observes in store
- Asks friends
- Usure who to trust
- Fear
- Anxious
ACTIVITY

Part 1

1. **Pick One Segment** (Lapsed, Casual, First-Timer)

2. **Map Out:**
   - **Say**
   - **Think**
   - **Do**
   - **Feel**
ACTIVITY
Part 2

1. How can your marketing messaging change to empathize with their needs and appeal to their sensibilities?

2. Craft a ticket sales invitation that meets that goal.
REPORT

1. Segment
2. What you learned about them
3. New messaging
4. Why you took that approach
1. What additional data do you wish you had?
2. How can you incorporate this with your team?
Shaping the future of your organization begins here.

1. Schedule a Call
   Our free strategy sessions are no-pressure conversations designed to uncover the challenges you are facing and provide industry-leading insight.
   
2. Have a Free Strategy Session
   During our time together, we will discuss the goals that you have alongside what types of engagement makes the most sense.
   
3. Start Reshaping Your Organization
   Once you and your team have settled on an engagement, we will begin formulating the next steps and timeline to reshape your organization for a thriving 21st century.
   
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Questions?