COVID-Era Customer Data Trends: Are We Really Bouncing Back?
Orchestras Insight Report – May 2022
Thu, June 2
IT TAKES 21 DAYS TO CREATE A HABIT
Super Easy Wine Bread!
Data-Driven CONSULTING
Disruptive,
data-driven,
change agency.
International Benchmark
trgarts.com
1) Powerful insights
2) Fuels Recovery
3) Orchestra specific view
4) Insight reports and trainings
1) 400 Organizations in U.S., Canada, U.K., and Ireland

2) 150+ in the NA

3) 30 Orchestras in the NA
TRG Data Corner – Arts Organizations
Tickets Sold in NA

-31% Revenue

-40% Units
TRG Data Corner - Orchestras
Tickets Sold in NA

- Revenue: -6%
- Units: -24%
TRG Data Corner – Arts Organizations
Donations in NA

Revenue: +13%
Units: -11%
TRG Data Corner – Orchestras
Donations in NA

+8% Revenue

-10% Units
Month by Month Comparison

Ticket Buying & Donations
Ticket Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Arts Organizations
Ticket Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Orchestras
Gift Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Arts Organizations

[Graph showing gift units and revenue for NA Arts Organizations from June 2018 to May 2022, comparing 2018-19 to 2021-22.]
Gift Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Orchestras
Starting Monday

1. Invest in Urgency
2. What’s up with Donations
Early Bird Prices

2022-2023 Early Bird Subscription Prices

<table>
<thead>
<tr>
<th>Day of Week</th>
<th>Zone A</th>
<th>Zone B</th>
<th>Zone C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>$250</td>
<td>$300</td>
<td>$350</td>
</tr>
<tr>
<td>Tuesday</td>
<td>$260</td>
<td>$310</td>
<td>$360</td>
</tr>
<tr>
<td>Wednesday</td>
<td>$270</td>
<td>$320</td>
<td>$370</td>
</tr>
<tr>
<td>Thursday</td>
<td>$280</td>
<td>$330</td>
<td>$380</td>
</tr>
<tr>
<td>Friday</td>
<td>$290</td>
<td>$340</td>
<td>$390</td>
</tr>
<tr>
<td>Saturday</td>
<td>$300</td>
<td>$350</td>
<td>$400</td>
</tr>
<tr>
<td>Sunday</td>
<td>$310</td>
<td>$360</td>
<td>$410</td>
</tr>
</tbody>
</table>

Seating Preferences
- Seats with NO STAIRS
- Wheelchair ACCESSIBLE and Companion Seats
- Capturing Services
- Audio Described Series (Sunday MATINEE)
- Sign Interpreted Series (Wednesday and Sunday Matinee)
- Discussion Series

Change My Subscription as indicated below:
- Number of Packages
- Day of Week
- Matinee/Evening
- Zone
- Number of Seats
- Cost per Subscription
- Total

Renew by April 26, 2022 for maximum savings.

Account and Contact Information

Renew your subscription by March 7 for priority seating access and waived fees!

We miss you! I'm writing today to thank you for being a recent subscriber to the VSO and invite you to be among the first to see the exciting concerts in our 2022-2023 season. We're looking ahead to a season full of joy, new voices, and incredible music with our new Music Director, Eric Jacobsen, and want you to join us.

In addition to a season that our musicians have called "the most exciting they can remember" at the VSO, you're going to notice our new subscription packages with more flexibility and more choice. This incredible season is a great time to renew your VSO subscription to an UNLIMITED or an 8-concert package and bring more music back into your life. Unlimited subscribers get the best of the best when it comes to value, concert access, and seating plus they never pay fees.

Yo-Yo Ma Access for 2022-23 Unlimited & 8-concert Subscribers: Add tickets to get the best seats for the magnificent Yo-Yo Ma in concert with the VSO months before the general public. For this ONE NIGHT ONLY: extraordinary musical event.

Renewing is simple:
- Review the information on the enclosed order form and confirm how many concerts you would like and where you would like to sit.
- Add on your tickets to Yo-Yo Ma and secure your preferred seating.
- Select your concerts (remember you can add/change your selections at any time).
- Mail, call, or go online to complete your order.

When you renew by March 7, you lock-in priority access to concerts and seating and waive subscription fees. Your early
The Two A’s of Consumer Confidence

1. Average Ticket Price (ATP)
2. Advance
Average Ticket Price – Last 12 Months vs Pre-Pandemic
NA Orchestras
Advance Ticket Units Jun-Dec – 2022 vs 2019

NA Orchestras – Down 32% (1,016,407 vs 1,319,064)
Starting Monday

1. Confidence
2. Maximize the Hotcakes
Charleston Symphony – Beethoven 9

- Doubled Marketing Expenses - $10K to $20K
- Early use of Demand Based Pricing
- Exceeded Revenue Goal by $30K and 1,600 Units
Demographics

1. Ethnicity
2. Generation
Ticket Sales by Ethnicity – 2021 vs 2020 vs 2019

NA Orchestras

- White/Other
- Hispanic
- Black
- Asian

2021 vs 2020 vs 2019
Donations by Ethnicity – 2021 vs 2020 vs 2019

NA Orchestras

- **White/Other**: The donations percentage for White/Other is significantly higher in 2021 compared to 2020 and 2019.
- **Hispanic**: There is a minimal increase in donations from 2019 to 2020, with a slight decrease in 2021.
- **Black**: The donations percentage for Black is the lowest among the categories, with a slight increase from 2019 to 2020, and a decrease in 2021.
- **Asian**: The donations percentage for Asian shows a slight increase from 2019 to 2020, with a decrease in 2021.

The data indicates that White/Other has the highest donations percentage, followed by Hispanic, Black, and Asian in that order.
Percentage of Arts Patrons by Generation

<table>
<thead>
<tr>
<th>Year</th>
<th>The Silent Generation</th>
<th>The Baby Boomer Generation</th>
<th>Generation X</th>
<th>The Millennial Generation</th>
<th>Generation Z</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>23%</td>
<td>45%</td>
<td>22%</td>
<td>7%</td>
<td>0.05%</td>
</tr>
<tr>
<td>2012</td>
<td>22%</td>
<td>45%</td>
<td>23%</td>
<td>8%</td>
<td>0.04%</td>
</tr>
<tr>
<td>2013</td>
<td>21%</td>
<td>45%</td>
<td>23%</td>
<td>9%</td>
<td>0.06%</td>
</tr>
<tr>
<td>2014</td>
<td>20%</td>
<td>45%</td>
<td>23%</td>
<td>10%</td>
<td>0.07%</td>
</tr>
<tr>
<td>2015</td>
<td>19%</td>
<td>44%</td>
<td>25%</td>
<td>11%</td>
<td>0.09%</td>
</tr>
<tr>
<td>2016</td>
<td>17%</td>
<td>43%</td>
<td>25%</td>
<td>13%</td>
<td>0.12%</td>
</tr>
<tr>
<td>2017</td>
<td>17%</td>
<td>43%</td>
<td>26%</td>
<td>13%</td>
<td>0.20%</td>
</tr>
</tbody>
</table>
Ticket Sales

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

NA Orchestras

![Bar chart showing ticket sales by generation for 2019, 2020, and 2021. The generations are Greatest (95+), Silent (77-94), Boomers (58-76), Gen X (42-57), Millennials (26-41), and Gen Z (10-25). The chart indicates a decrease in sales for all generations from 2019 to 2020, with a slight increase in 2021.](chart.png)
Ticket Buyers by Generation – 2021 vs 2019

NA Arts Organizations

<table>
<thead>
<tr>
<th>Generation</th>
<th>2019</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generation Z</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>(Born after 1997)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generation Y</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>(Born 1981-1997)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generation X</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>(Born 1965-1980)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>(Born 1946-1964)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Silent</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>(Born 1928-1945)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greatest Generation</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>(Born prior to 1928)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Purple Seven & TRG Arts. February 2022.
Donations by Generation – 2019 vs 2020 vs 2021
NA Orchestras
Starting Monday

1. Track Ethnicity
2. Have a Gen X Strategy
Generation X

Surprise Stats

Email | News & Weather | Banking

Top 3 internet activities.

Candor

This generation needs no help with Candor – they’re allergic to sugarcoating.
1) **Approach**
   - Direct and to the point, no surprises.
   - Be a helpful resource.

2) **Engage**
   - Be authentic, build trust.
   - Layout all the options.

3) **Communicate**
   - Peer referrals are golden.
   - Taking action. Should be easy and quick.
   - Cut out the sales hype.
Typology

Segmentation by Loyalty
# Customer Typology

Segment Definitions: **Think RFMG**

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

- New Customers: 24%
- Once Before: 7%
- Convertee: 6%
- Active: 13%
- Super Active: 4%
- Stale: 7%
- Lapsed: 39%
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
Why Loyalty Matters
Net Revenue – NA Arts Organization Case Study

<table>
<thead>
<tr>
<th></th>
<th>Single Ticket Buyers</th>
<th>New Subscribers</th>
<th>Renewing Subscribers</th>
<th>Renewing Subscriber-Donors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Per Patron Yield</strong></td>
<td>$53.84</td>
<td>$156.05</td>
<td>$341.51</td>
<td>$550.42</td>
</tr>
<tr>
<td><strong>Cost-of-Sale</strong></td>
<td>20%</td>
<td>25%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Renewal Rate</strong></td>
<td>23%</td>
<td>46%</td>
<td>69%</td>
<td>88%</td>
</tr>
</tbody>
</table>
Starting Monday

1. Growth vs Retention
2. Budget Accordingly
Summary...

- Goal-oriented ACTION.
- Responsive and empathetic.
- Implementation.
- Use of data – to define need and measure success.
COVID-19 Sector Benchmark

Join Us

- Participating organizations
- Ticketing partners
- Funders and partners

Sign up here:
[go.trgarts.com/benchmark](go.trgarts.com/benchmark)

Thank you.
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Questions?