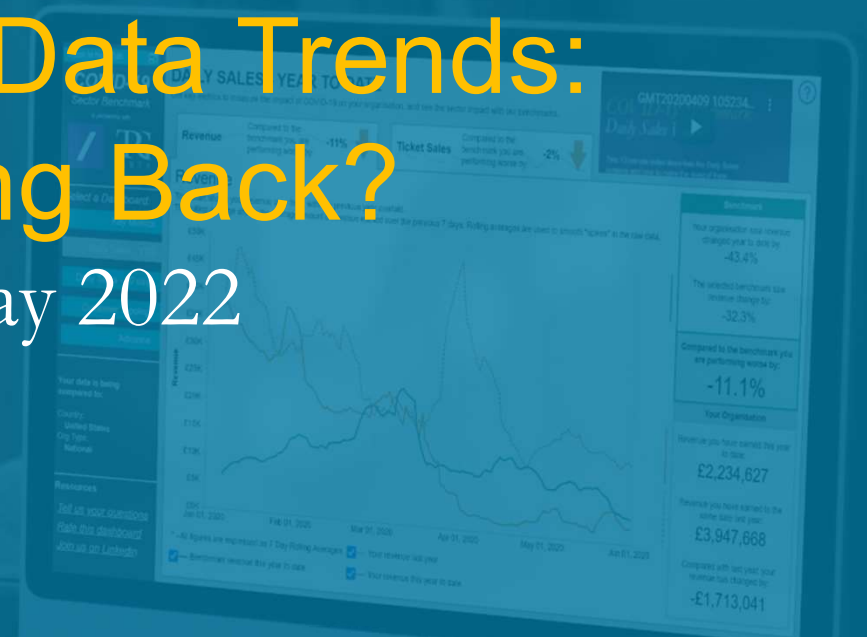


# COVID-Era Customer Data Trends: Are We Really Bouncing Back?

Orchestras Insight Report – May 2022

Thu, June 2



**RG**  
ARTS

**League**  
of American  
Orchestras

Presented by



**Eric Nelson**  
Client Engagement Officer

IT TAKES 21 DAYS  
TO **BREAK** A  
HABIT

Super Easy

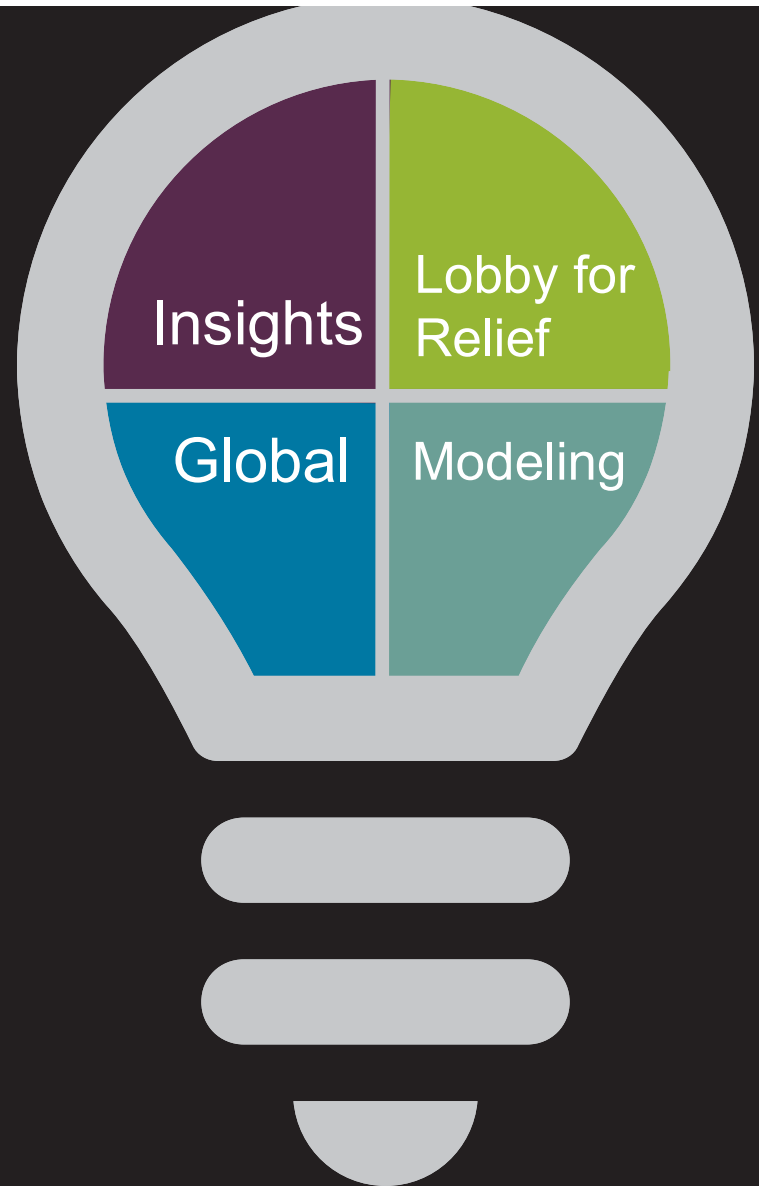


Wine Bread!

The background is a solid teal color. In the center-right area, there are several faint, light-teal gear icons of various sizes, some overlapping each other.

*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**

# Goals of Partnership

- 1) 400 Organizations in U.S., Canada, U.K., and Ireland**
- 2) 150+ in the NA**
- 3) 30 Orchestras in the NA**

# Benchmark Details Study Cohort



**KEY METRICS** Benchmark figures based on averages from 73 venues in the North America Theatre benchmark

BENCHMARK TERRITORY  
**North America**  
BENCHMARK TYPE  
**Theatre**

OPEN IN NEW TAB

WHAT'S NEW

**KEY METRICS**

LAST 30 DAYS

YEAR TO DATE

TYPOLGY

ADVANCE

SUBSCRIPTIONS

DONATIONS

SENTIMENT

WORKING IN PARTNERSHIP



LAST 30 DAYS **REVENUE** **TICKETS** YEAR TO DATE **REVENUE** **TICKETS**



<b>Your Data</b>	<b>\$201,222</b>	<b>186 %</b>
Same period in 2019		vs 2019
<b>\$575,995</b>	<b>\$109,531</b>	<b>426 %</b>
Revenue in the last 30 days	Same period in 2021	vs 2021
<b>The Benchmark</b>	<b>\$566,618</b>	<b>-29 %</b>
Same period in 2019		vs 2019
<b>\$403,479</b>	<b>\$117,570</b>	<b>243 %</b>
Average revenue in the last 30 days	Same period in 2021	vs 2021

**Your Data vs The Benchmark**

**215 %** vs 2019 Benchmark

**183 %** vs 2021 Benchmark

>0 = Better than the benchmark  
<0 = Worse than the benchmark

LAST 30 DAYS DASHBOARD →      YEAR TO DATE DASHBOARD →

**Advance Revenue**

Revenue for unmatured performances over the next 12 months

**\$671,855**  
Your data

**\$880,455**  
Average of venues in the benchmark

**-24 %**  
Your data vs the benchmark

ADVANCE DASHBOARD →

**Subscription Revenue**

Subscription revenue over the year to date

**\$945,572**  
Your data

**\$1,335,939**  
Average of venues in the benchmark

**-29 %**  
Your data vs the benchmark

SUBSCRIPTION DASHBOARD →

**Customer Typology**

New Customers is your largest active segment and makes up:

<b>1,267</b> Patrons	<b>42 %</b> % patrons
<b>2,209</b> Patrons	<b>57 %</b> % Patrons

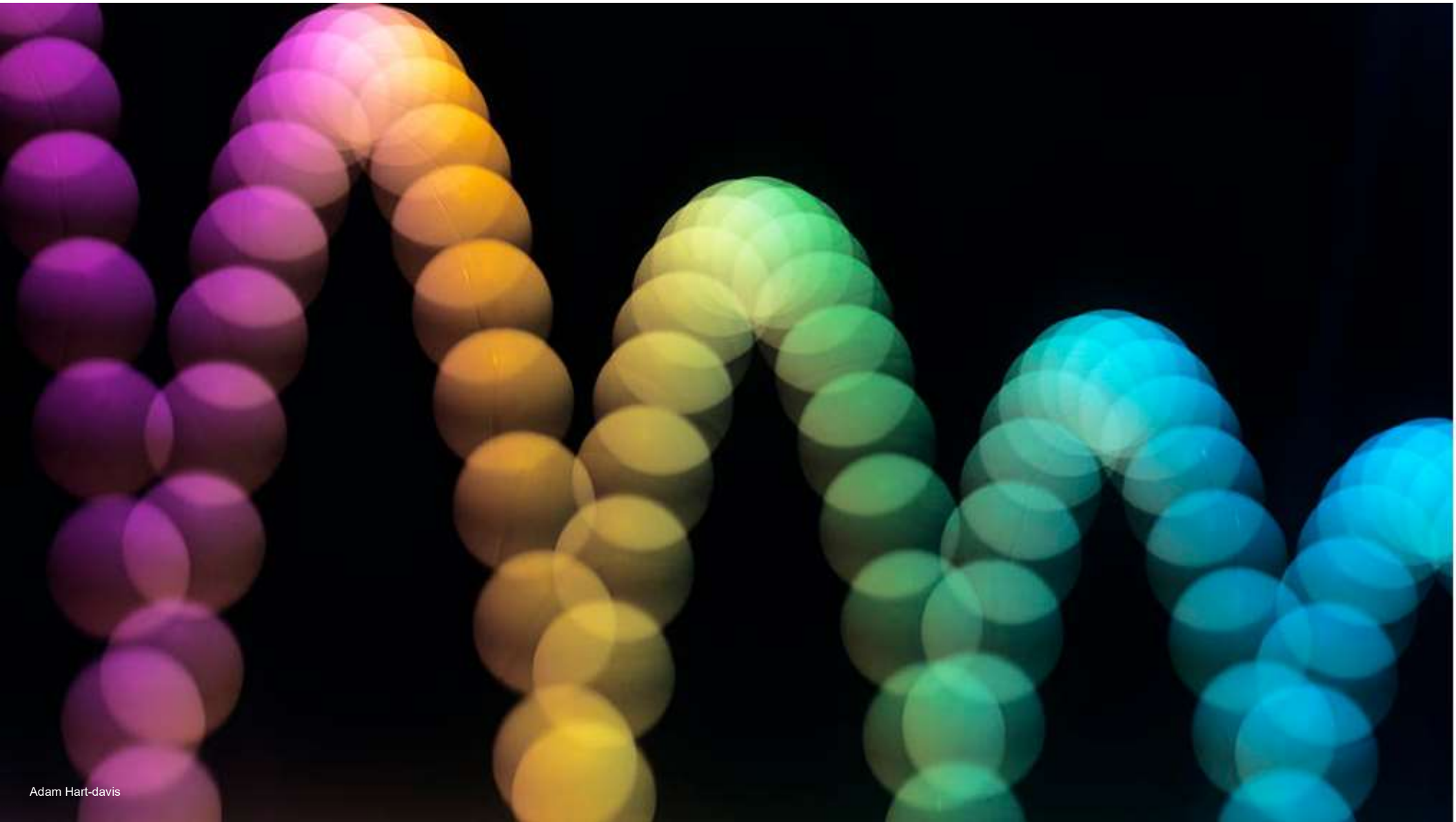
**Donations**

Received income over the year to date

<b>\$2,552,832</b> Your Data	<b>\$1,004,697</b> Avg benchmark venue
---------------------------------	---

Your data vs the benchmark **154 %**

TYPOLGY DASHBOARD →      DONATION DASHBOARD →

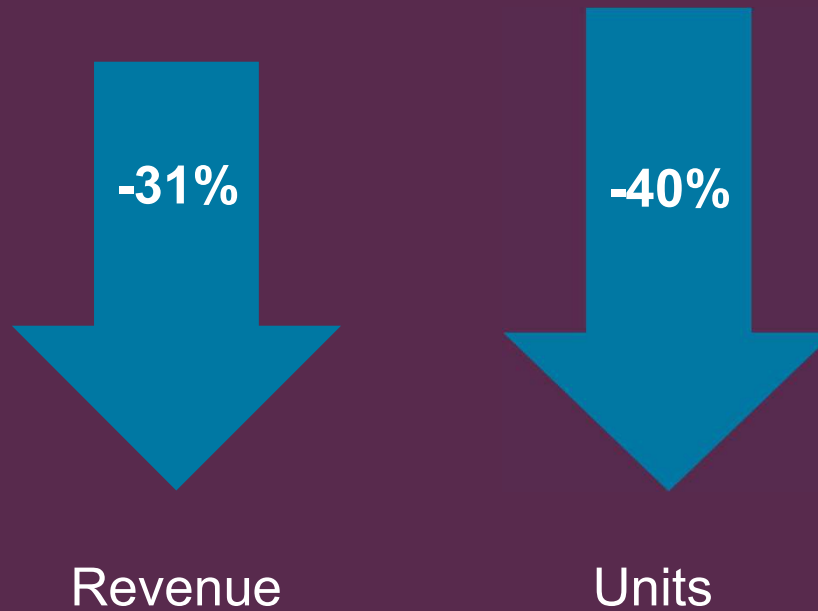


Adam Hart-davis

# TRG Data Corner – Arts Organizations

12-Month Comparison – June 2021-May 2022 vs. June 2018-May 2019

Tickets Sold in NA



# TRG Data Corner - Orchestras

12-Month Comparison – June 2021-May 2022 vs. June 2018-May 2019  
Tickets Sold in NA



-6%

Revenue



-24%

Units



# TRG Data Corner – Arts Organizations

12-Month Comparison – June 2021-May 2022 vs. June 2018-May 2019

Donations in NA



Revenue



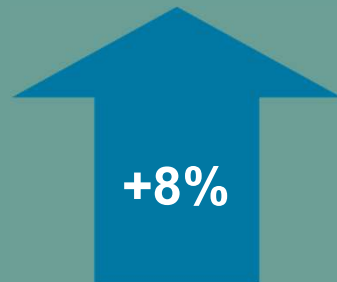
Units





# TRG Data Corner – Orchestras

12-Month Comparison – June 2021-May 2022 vs. June 2018-May 2019  
Donations in NA



Revenue



Units

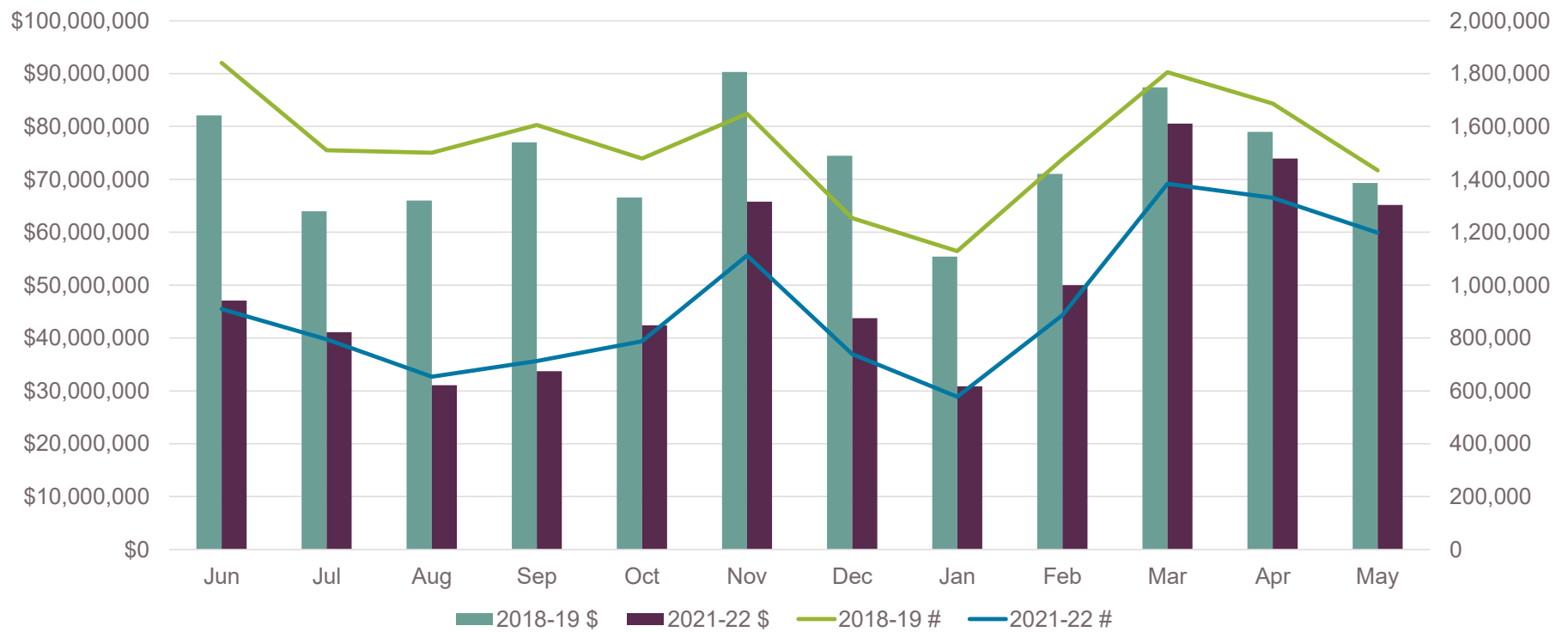


# Month by Month Comparison

Ticket Buying & Donations

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

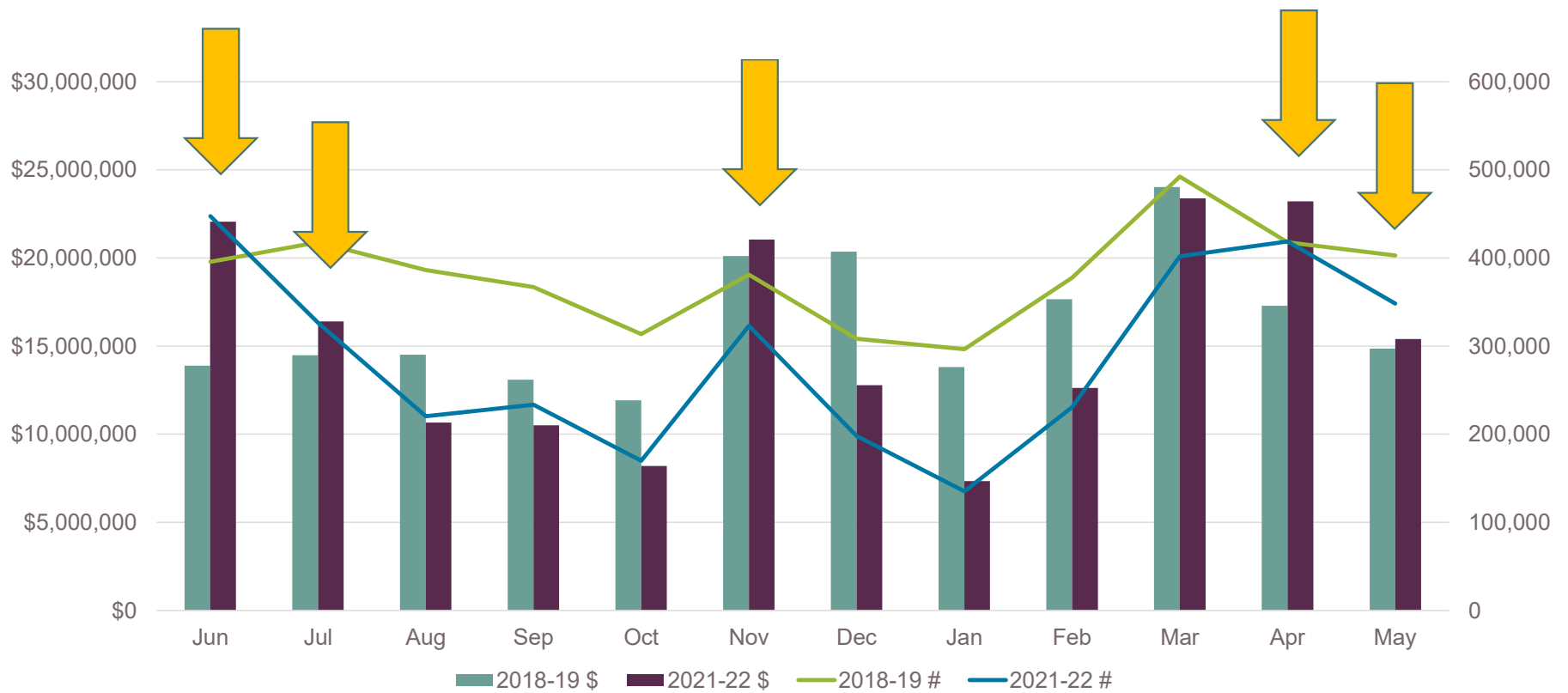
NA Arts Organizations





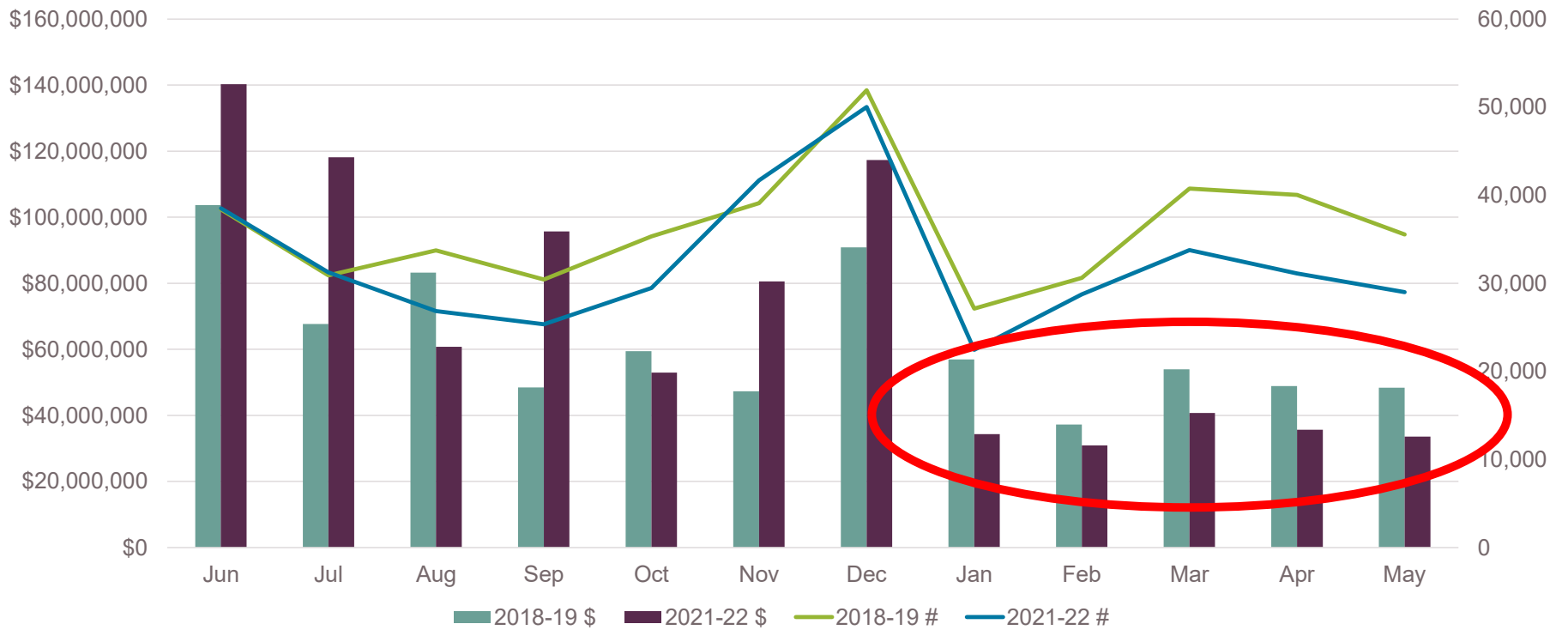
# Ticket Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Orchestras



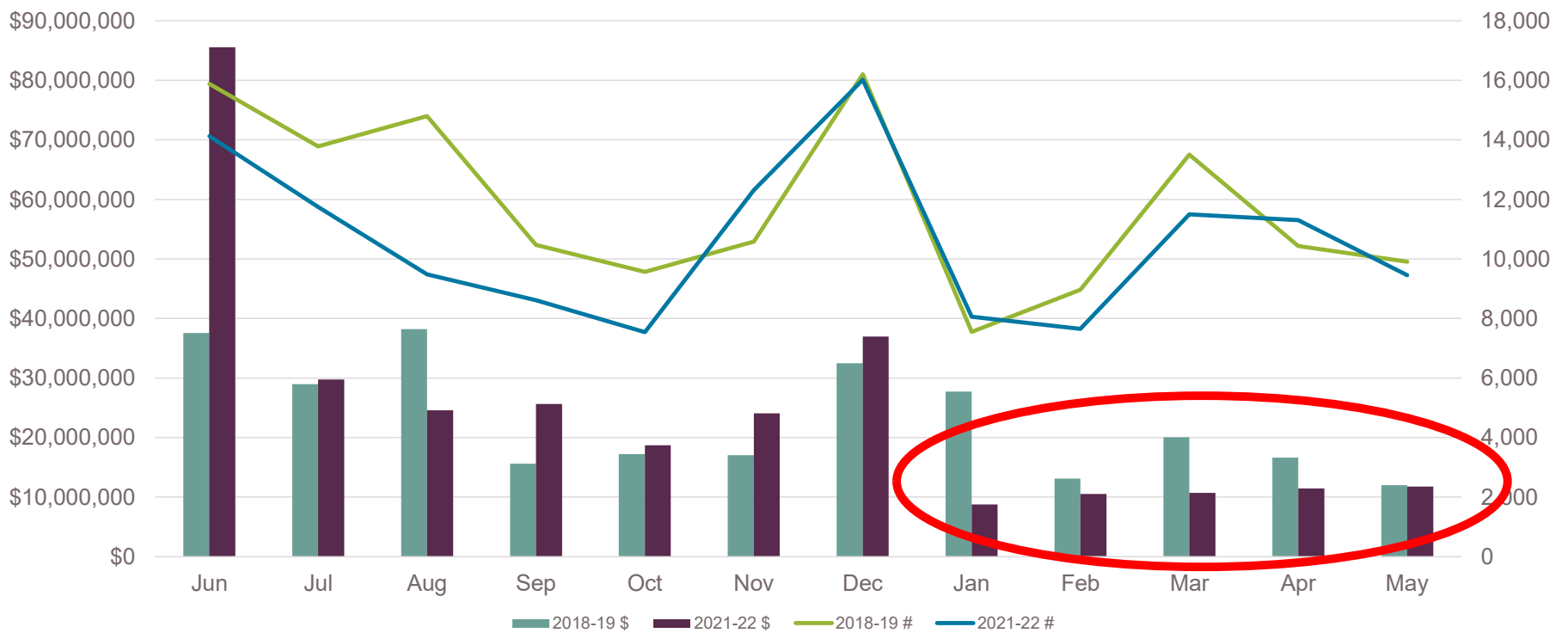
# Gift Units & Revenue – Last 12 Months vs Pre-Pandemic

NA Arts Organizations



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

NA Orchestras



# *Starting Monday*

- 1. Invest in Urgency*
- 2. What's up with Donations*

**RENEW BY APRIL 26, 2022 FOR MAXIMUM SAVINGS**

# STUDIO

**2022-2023 SEASON SUBSCRIPTION**

**Early Bird Prices**  
2022-2023 EARLY BIRD SUBSCRIPTION PRICES

DAY OF WEEK	ZONE A (Premium)	ZONE II (Value)
Tue/Wed/Thu/Sun evening/Conc matinee	\$261.50 (\$26 (Org))	\$247.50 (\$25 (Org))
Fri/Sat evening and Sun matinee	\$344.50 (\$45 (Org))	\$328 (\$40 (Org))

**STEP 1: Select Your Subscription**

KEEP MY SUBSCRIPTION AS-IS.

Subscription Packages:  Total  Zone  Seats

Minors:  Minors Zone  Minors Seating

Millions:  Millions Zone  Millions Seating

CHANGE MY SUBSCRIPTION AS INDICATED BELOW.

Number of packages: \_\_\_\_\_

Day of Week: \_\_\_\_\_

Matinee/Evening: \_\_\_\_\_

Zone: \_\_\_\_\_

Number of seats:  $\times$  Cost per subscription = \$ Total

**Seating Preferences**

SEATS WITH NO STAIRS

WHEELCHAIR ACCESSIBLE AND COMPANION SEATS # \_\_\_\_\_

CAPTIONING SERVICES

AUDIO DESCRIBED SERIES (SUNDAY MATINEE)

SIGN INTERPRETED SERIES (WEDNESDAY AND SUNDAY MATINEE)

DISCUSSION SERIES (COLLECT SATURDAY AND SUNDAY MATINEE PERFORMANCES)

ADDITIONAL SEATING PREFERENCES

**RENEW BY APRIL 26, 2022 FOR MAXIMUM SAVINGS**

**ACCOUNT AND CONTACT INFORMATION**

**YOUR ACCOUNT LOGIN: <<PRIMARY LOGIN>>**  
PATRON ID# <<CUSTOMER\_ID>>

**UPDATE YOUR CONTACT INFORMATION**

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Total Address: \_\_\_\_\_



**More Joy, More Choice**  
**MORE MUSIC!** VIRGINIA SYMPHONY  
2022-2023 SEASON

Music Director: Eric Jacobsen

February 14, 2022

[outside sal]  
[address]  
[city], [state] [zip]



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

Dear [inside sal]

**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 more live 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-pack for 2022-23 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: 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.

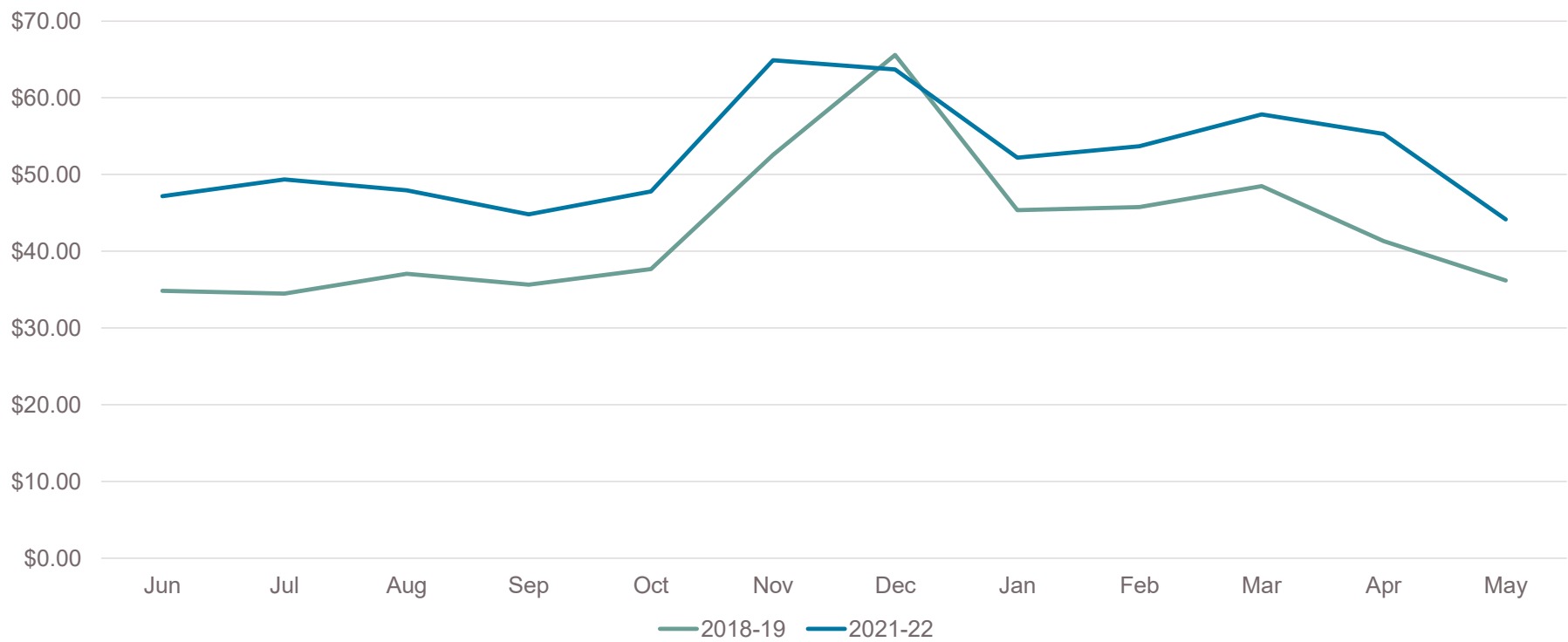
When you renew by March 7, you lock-in priority access to concerts and seating and waive subscription fees. Your early

# *The Two A's of Consumer Confidence*

- 1. Average Ticket Price (ATP)*
- 2. Advance*

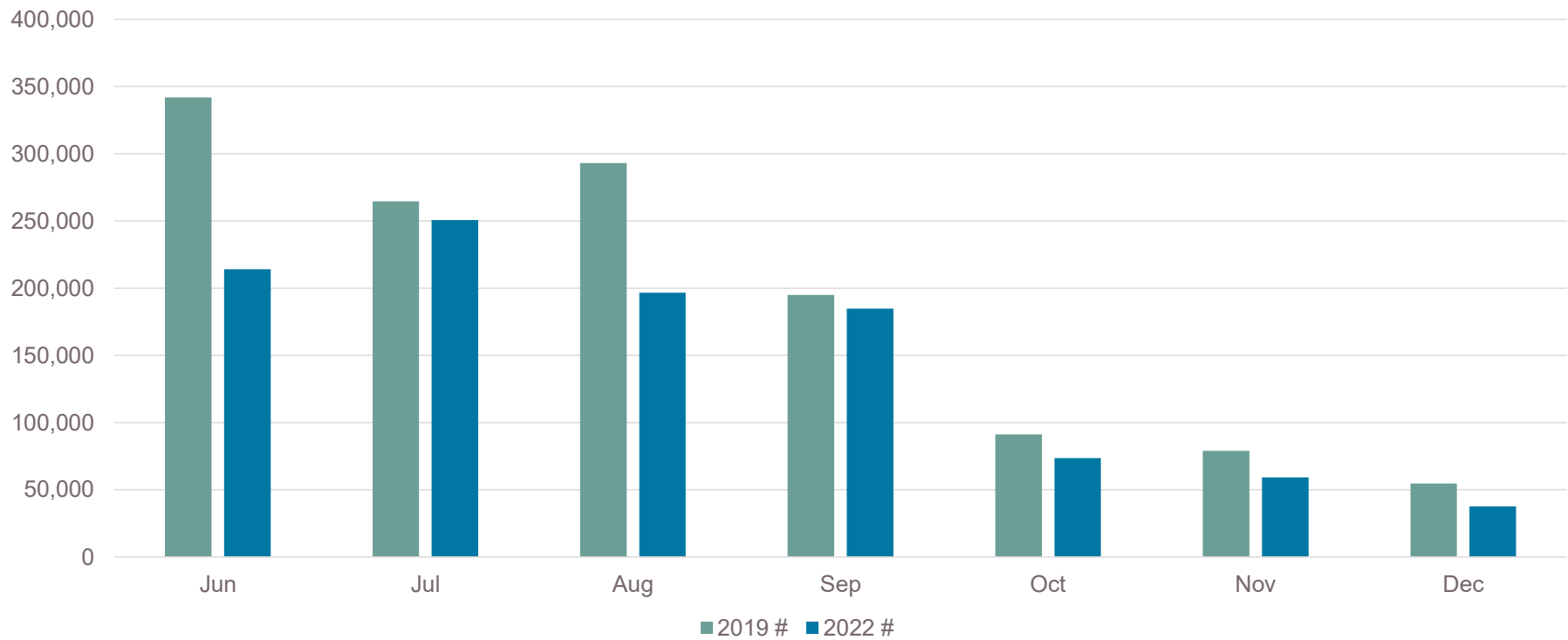
# Average Ticket Price – Last 12 Months vs Pre-Pandemic

NA Orchestras



# Advance Ticket Units Jun-Dec – 2022 vs 2019

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





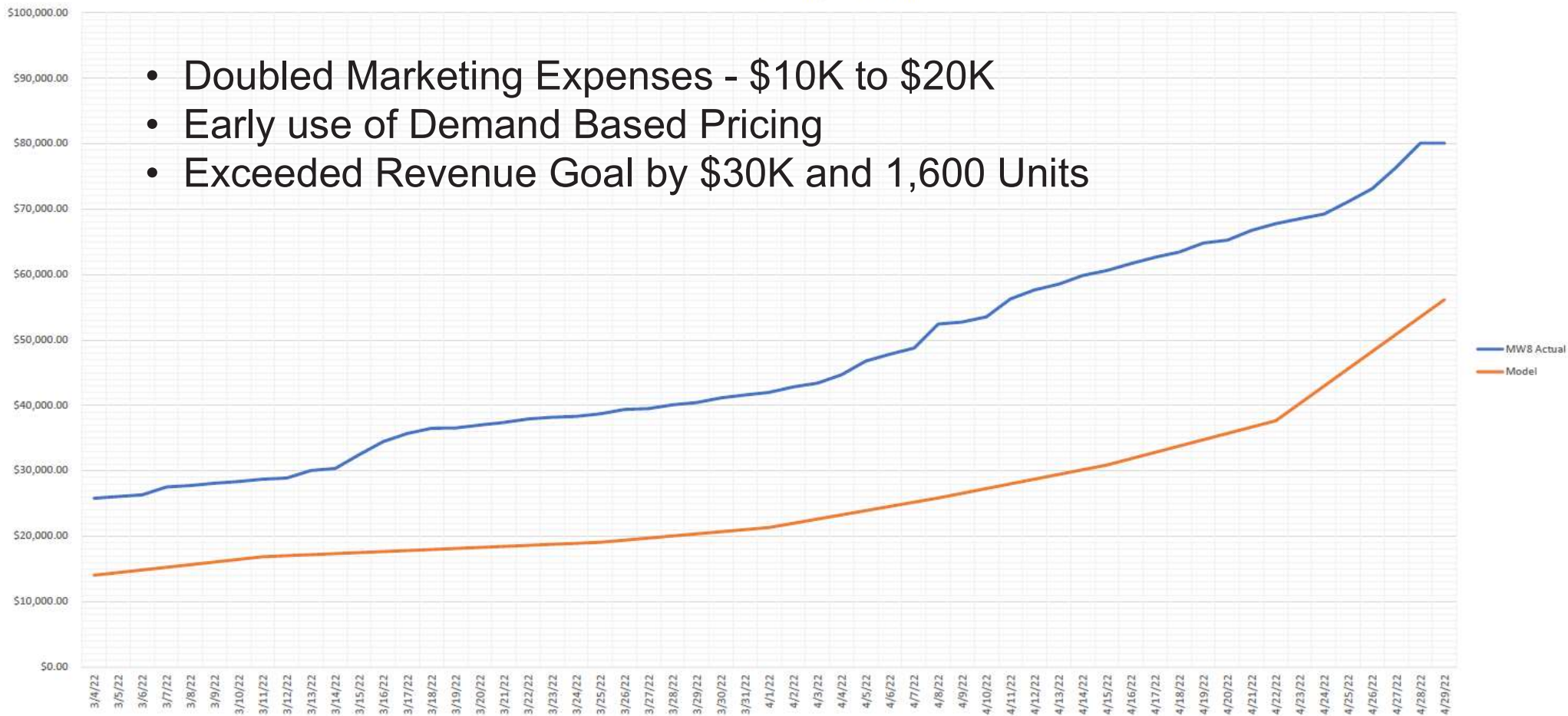
# *Starting Monday*

1. *Confidence*
2. *Maximize the Hotcakes*

# Charleston Symphony – Beethoven 9

MW8 Single Ticket Sales

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

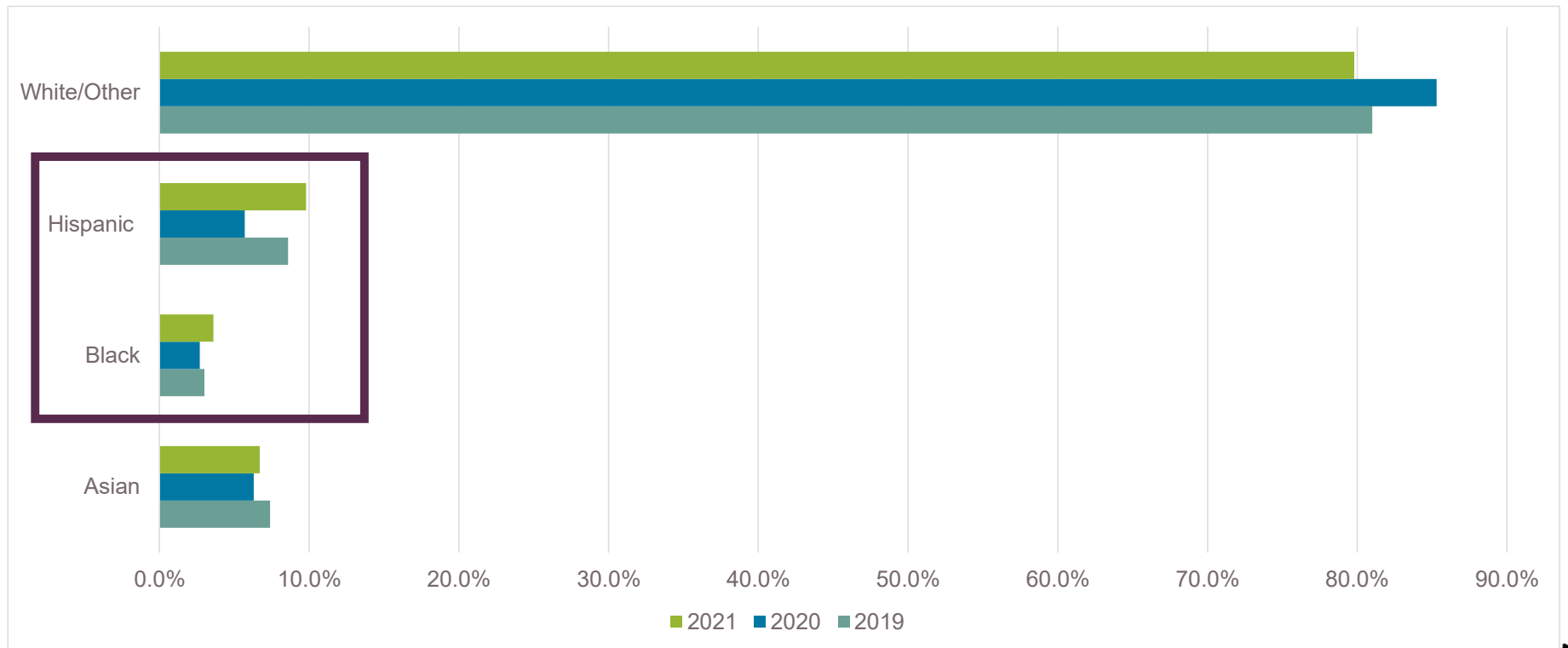


# *Demographics*

- 1. Ethnicity*
- 2. Generation*

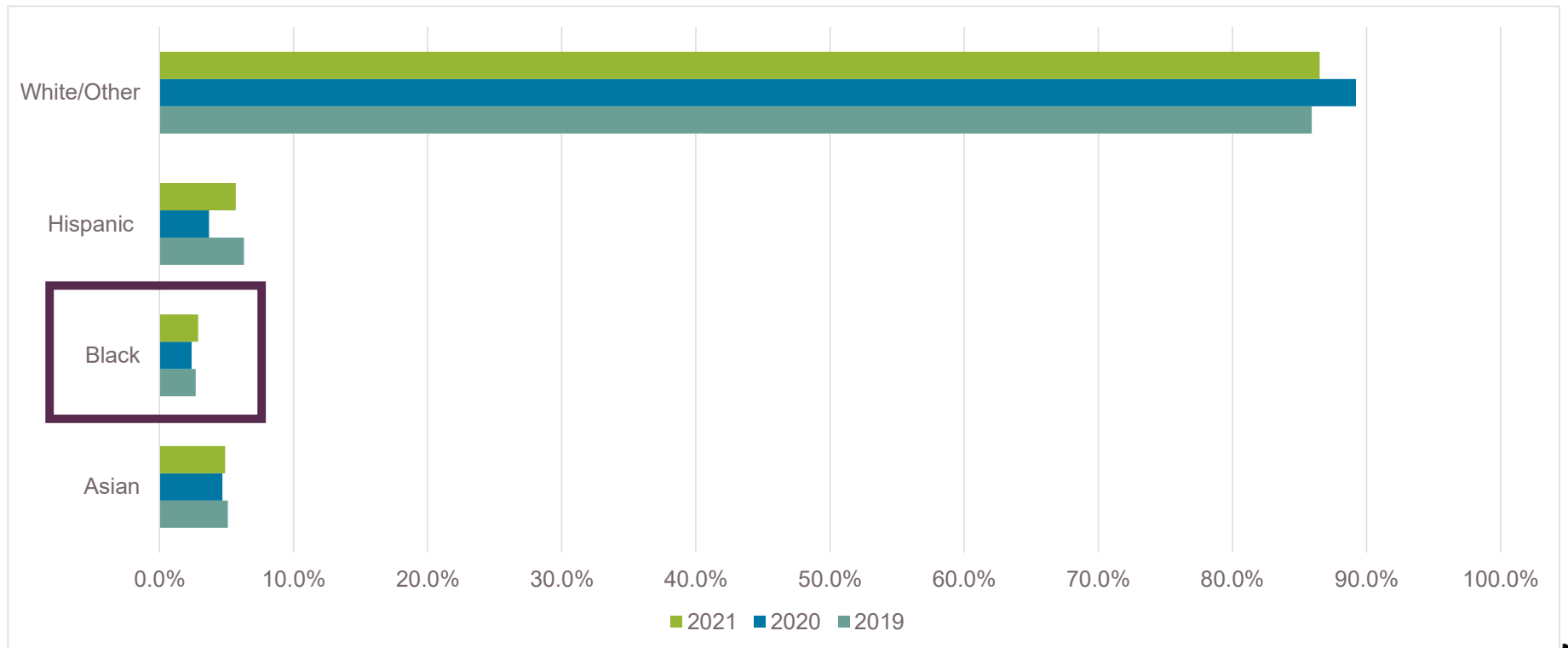
# Ticket Sales by Ethnicity – 2021 vs 2020 vs 2019

NA Orchestras

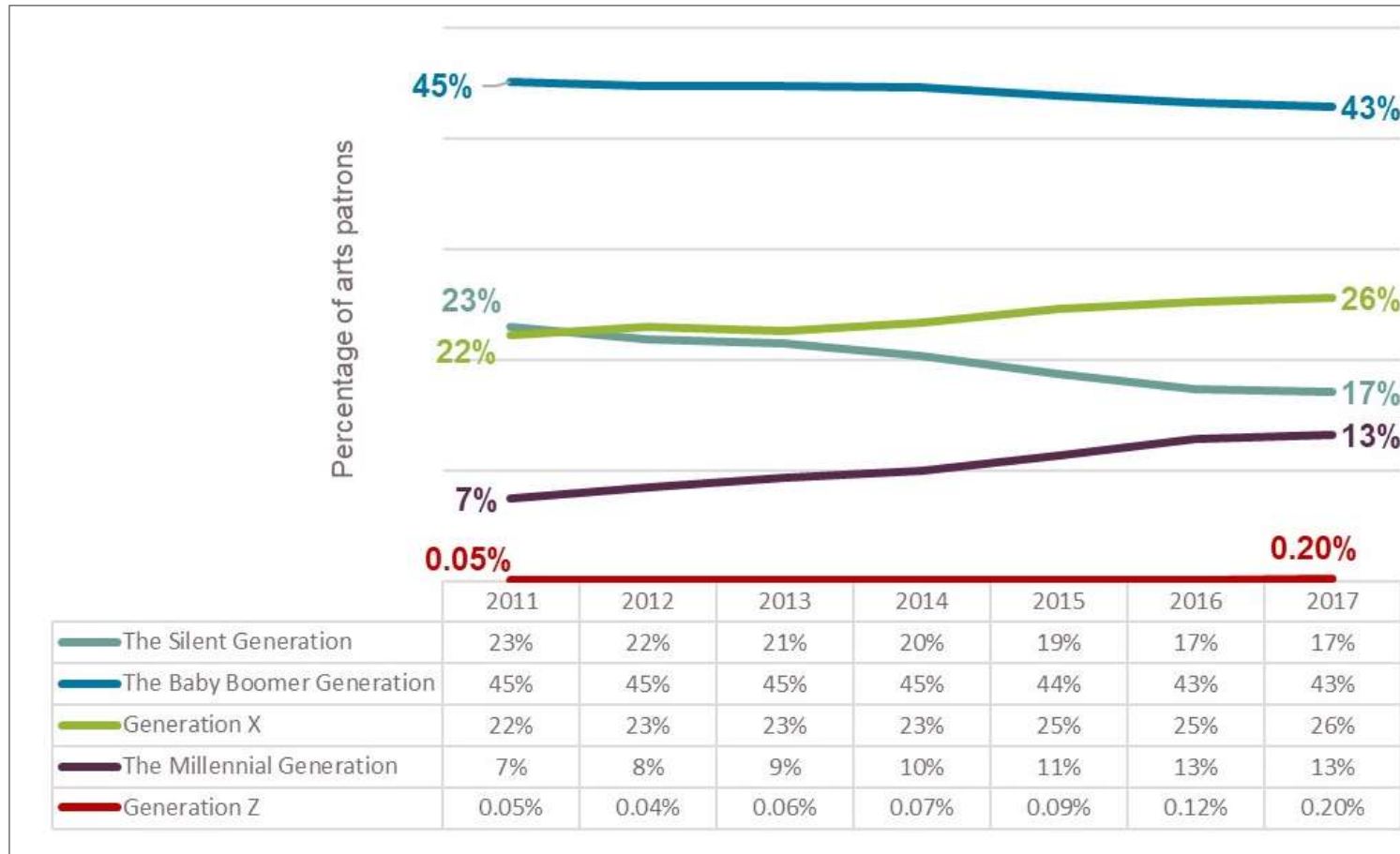


# Donations by Ethnicity – 2021 vs 2020 vs 2019

NA Orchestras



# Percentage of Arts Patrons by Generation

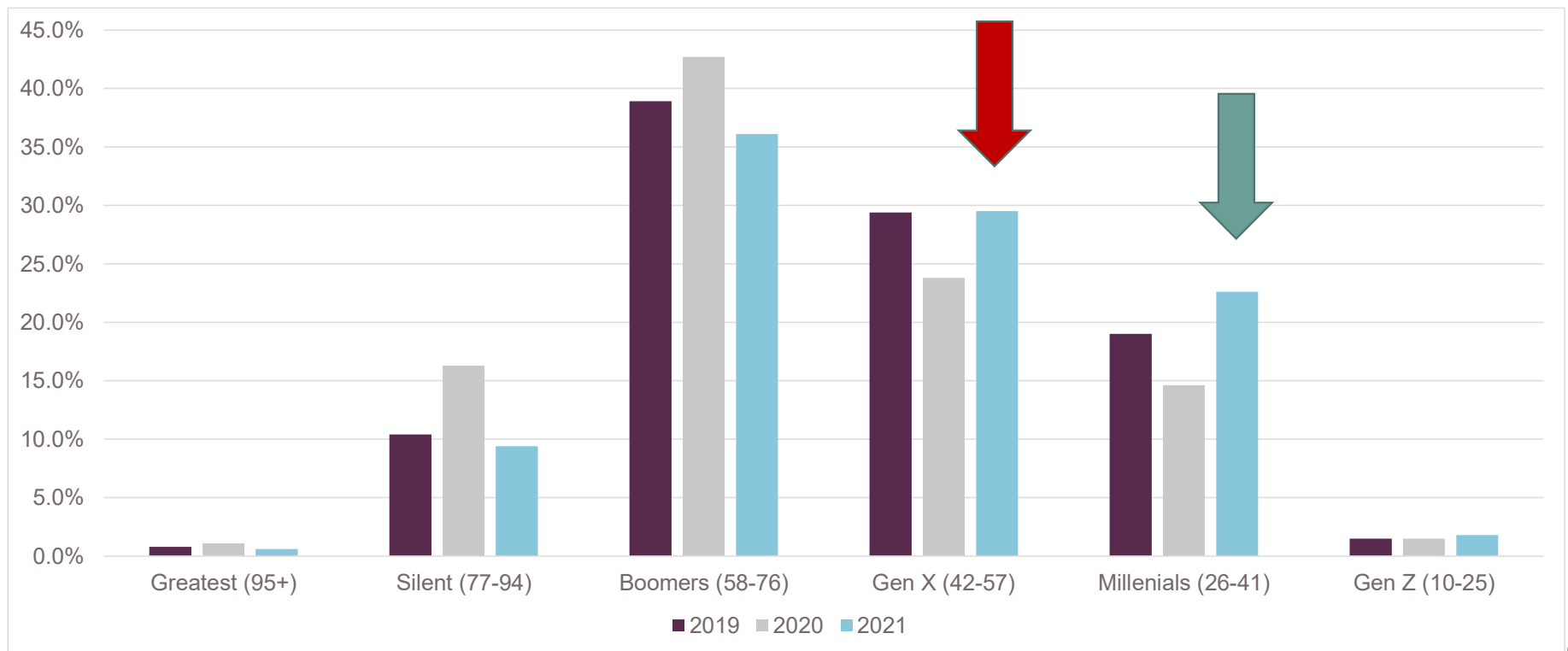


# Ticket Sales

“Must Have” is a  
Gen X Strategy

# Ticket Sales by Generation – 2019 vs 2020 vs 2021

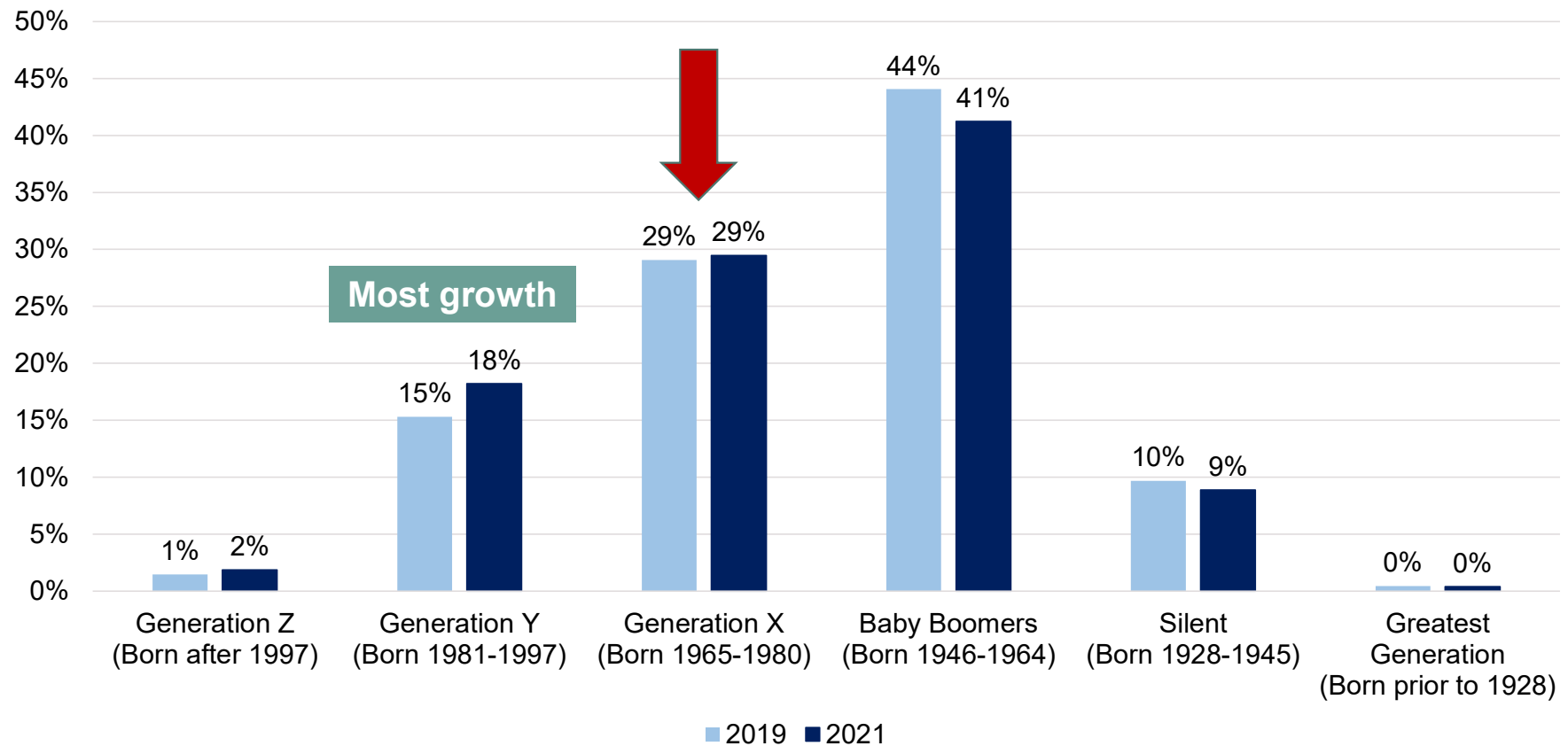
NA Orchestras





# Ticket Buyers by Generation – 2021 vs 2019

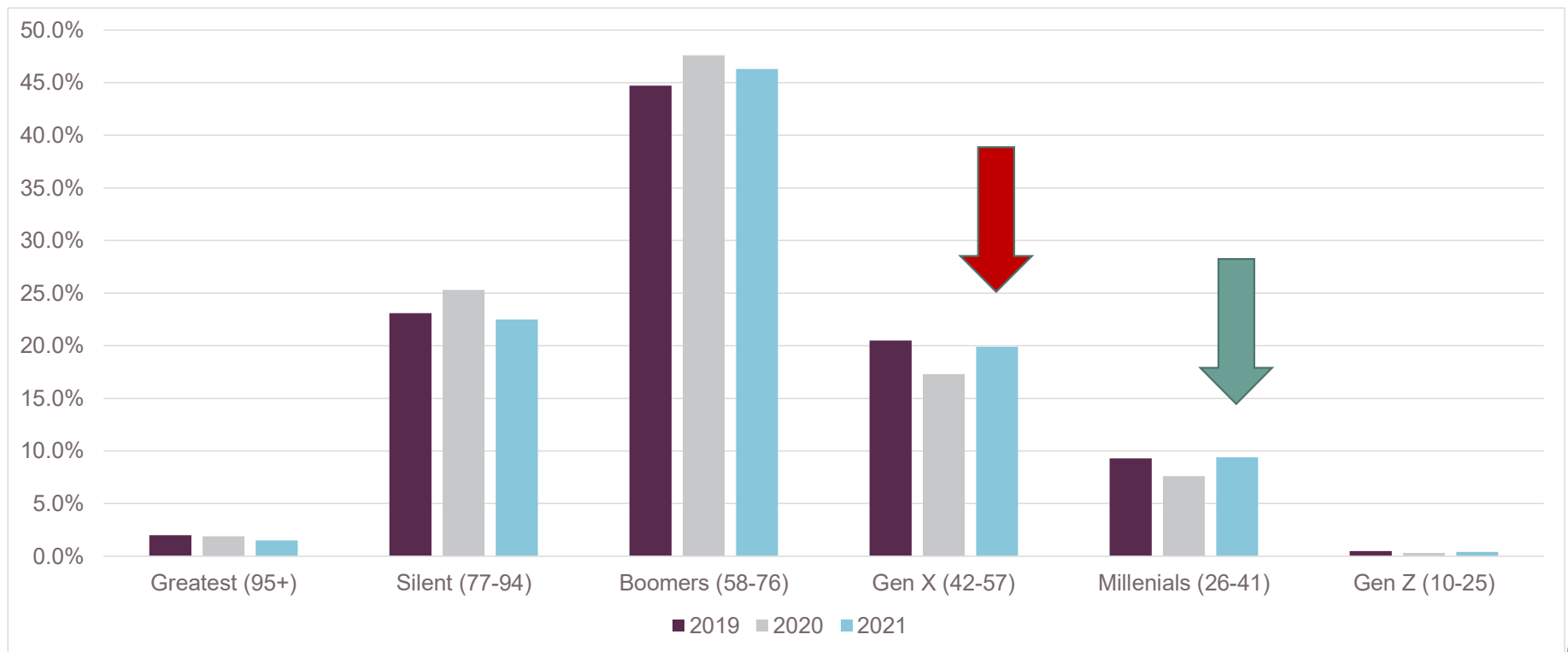
NA Arts Organizations



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*

Email

News &  
Weather

Banking

Top 3 internet activities.

Candor

This generation needs no help with  
Candor – they're allergic to sugarcoating.

Generation X

*Surprise*

*Stats*

## 1) Approach

- Direct and to the point, no surprises.
- Be a helpful resource.

## 2) Engage

- Be authentic, build trust.
- Lay out all the options.

## 3) Communicate

- Peer referrals are golden.
- Taking action. Should be easy and quick.
- Cut out the sales hype.

# Generation X *Tactics*

*Typology*

*Segmentation by Loyalty*

# Customer Typology

Segment Definitions: **Think RFMG**

Acquisition

- **New Customer** – had not transacted previously

Current  
Customers

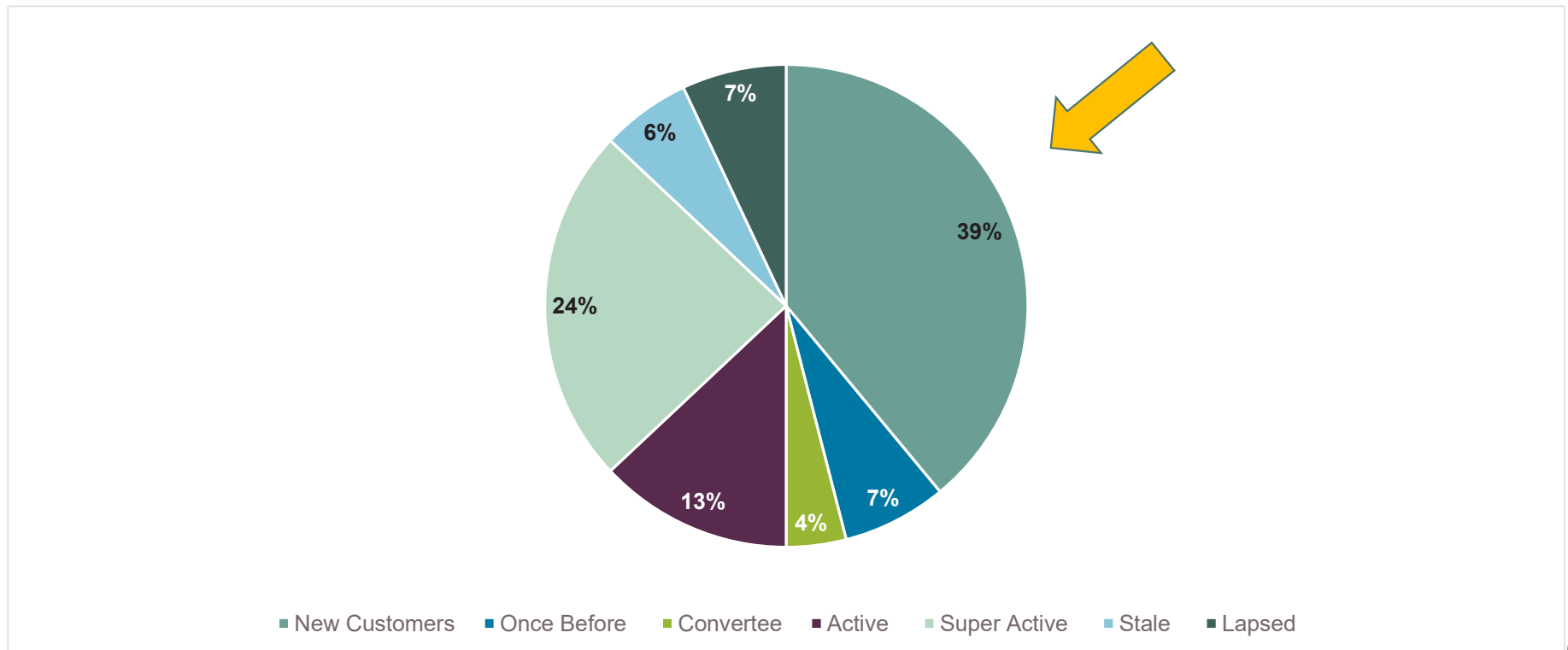
- **Once Before** – once before within the past 18 months
- **Convertee** – twice before and at least one within the past 18 months
- **Active** – 3-9 times in their history and at least once in the past 18 months
- **Super Active** – 10+ times in their history and at least once in the past 18 months

Re-Engaged

- **Stale** – last attendance, prior to most recent purchase, was 18-36 months ago
- **Lapsed** – last attendance, prior to most recent purchase, was 3 years or more ago

# Ticket Sales by Typology – May 2022

NA Orchestras





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

	Single Ticket Buyers	New Subscribers	Renewing Subscribers	Renewing Subscriber-Donors
Per Patron Yield	\$53.84	\$156.05	\$341.51	\$550.42
Cost-of-Sale	20%	25%	3%	3%
Renewal Rate	23%	46%	69%	88%

# *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](https://go.trgarts.com/benchmark)

*Thank you.*



## Join the Sector Benchmark

Join the TRG Arts & Purple Seven COVID-19 Sector Benchmarks

Register  Data Privacy

TRG Arts and Purple Seven have partnered to provide real-time intelligence and advice to the arts and cultural sector on the economic impact of COVID-19. This partnership allows us to bring together live sales feeds from hundreds of venues around the world to effectively provide data analysis, counsel on insights, and resources for lobbying government relief packages to ensure we travel through and beyond the immediate crisis.

In an effort to support the sector at this critical time, there will be no charge for this service. An automated data feed will be set up between your box office and our secure servers. Once this is established, we will monitor it to ensure your data flows every day. Our systems and processes are fully compliant with all international regulations (including GDPR). All data will be anonymized and aggregated, to be used solely for the expressed purpose of this initiative. We do not use your customer data for anything other than the benchmark, unless you ask us to, and your sales figures and customer data will not be identifiable.

Join us in uniting the sector for resiliency, innovation, collaboration and generosity of spirit. Together we are stronger.

If you have any specific questions, please feel free to [contact us directly](#).

### Where are you based? \*

- USA  UK & Europe  
 Canada

### Name \*

First  Last

### Phone \*

### Email \*





**Eric Nelson**

Client Engagement Officer

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719.323.4125



