

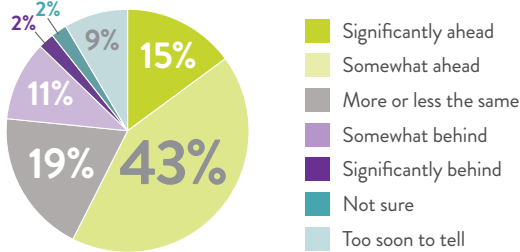
JULY 25, 2023

The Advisory Board for the Arts regularly surveys leaders at arts organizations — including operas, ballets, symphonies, festivals, theaters, venues, schools, advocacy organizations, and museums — about issues relevant to the arts world. This online survey was fielded **July 10–19, 2023**. This is the seventy-eighth survey of the series and was designed to help arts leaders benchmark themselves with a mid-year poll on strategy and finance.

HEALTH OF SUBSCRIPTION/MEMBERSHIPS & SINGLE TICKET SALES

Subscription/Membership Sales Are Tracking Slightly Ahead

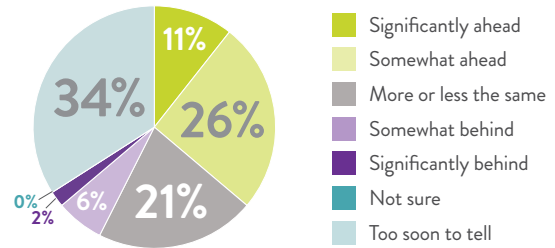
How are your overall subscription/membership sales tracking compared to last year?



N=47

Too Soon to Tell How Single Ticket Sales Are Tracking

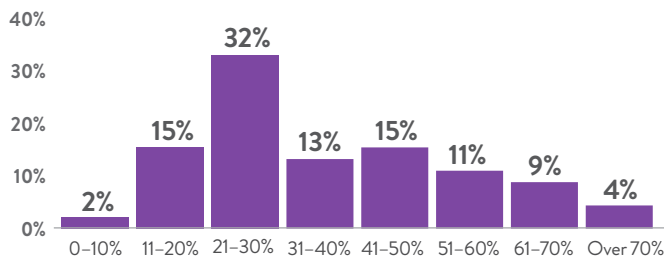
How are your overall single ticket sales tracking compared to last year?



N=47

21–30% of Earned Revenue Comes from Single Ticket Sales

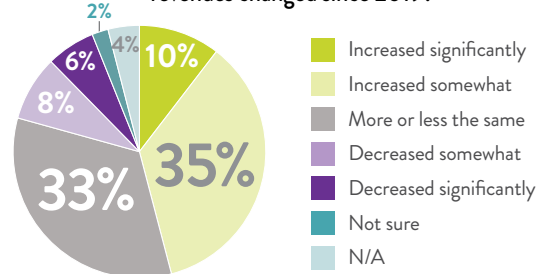
What % of your total earned revenue comes from single ticket sales?



N=47

Single Ticket Sales Over Total Ticket Revenues Have Somewhat Increased Since Pre-Pandemic

How has the % of single ticket sales over total ticket revenues changed since 2019?

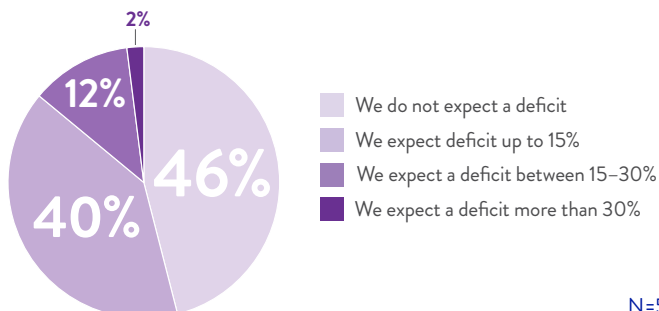


N=48

BUDGET FORECASTS

Operating Deficits Below 15% Anticipated

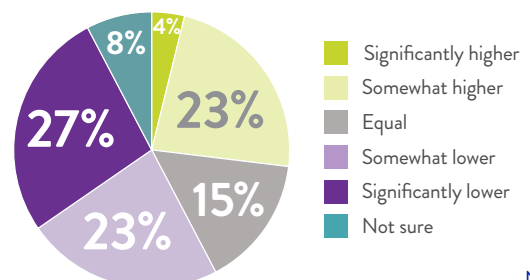
Do you anticipate an operating deficit for the current fiscal year?



N=50

Orgs Have Mixed Predictions on Future Deficits

Do you expect a greater deficit next fiscal year?



N=26

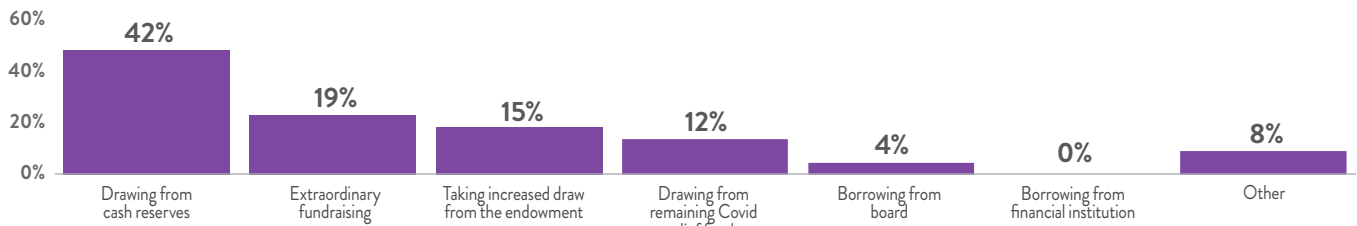
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BUDGET SALES

Orgs Plan to Draw on Cash Reserves for Operating Deficits

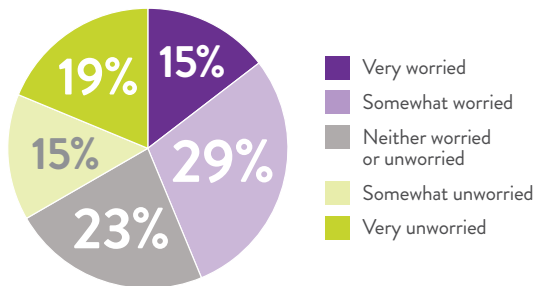
How do you expect to fund your operating deficits this fiscal year?



N=26

Orgs Have Mixed Concerns About Cash

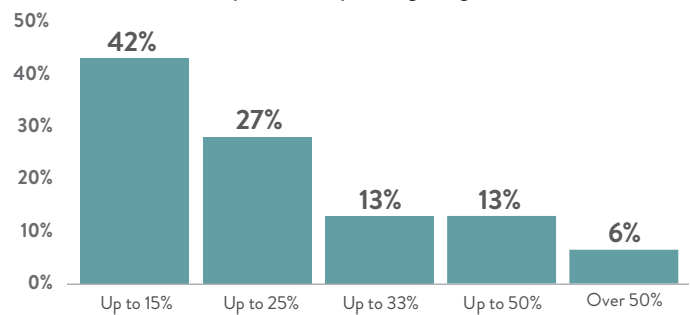
How worried are you about your org's current available cash and cash reserves?



N=48

Cash Reserves are <25% of Operating Budgets

What is the current size of your cash reserve as a % of your total operating budget?

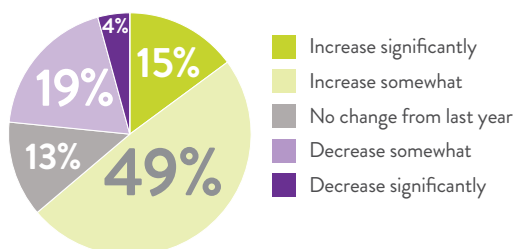


N=48

OPERATING BUDGET

Budgets Have Increased Somewhat

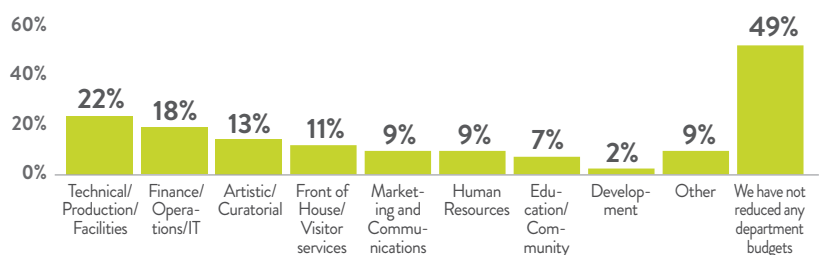
How has your overall budget changed compared to last year?



N=47

Most Have Not Reduced Any Department Budgets

For which departments have you reduced the operating budget the most compared to last year?



N=45

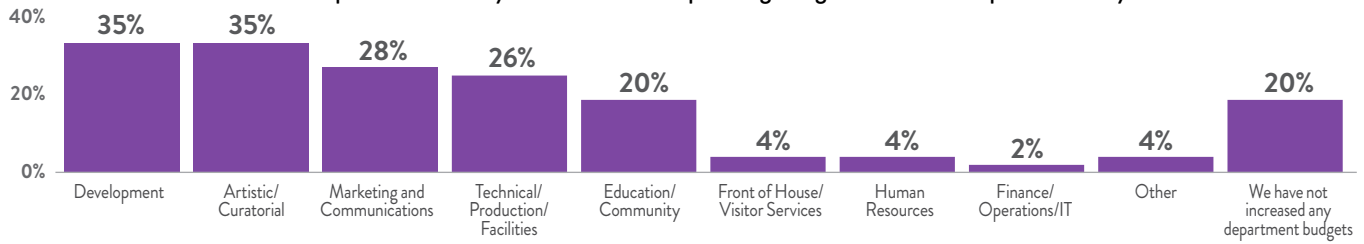
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OPERATING BUDGET

Most Increase Development & Artistic/Curatorial Budget

For which departments have you increased the operating budget the most compared to last year?

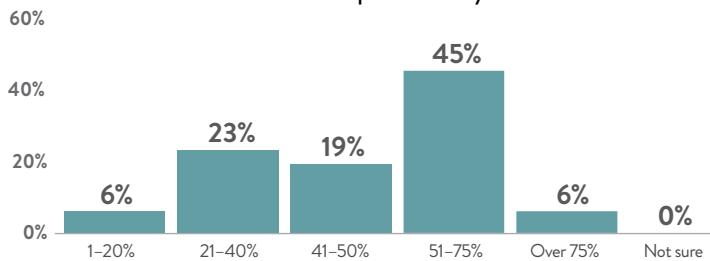


N=46

FUNDRAISING TRENDS & FORECASTS

51–75% of Total Operating Revenue Comes from Contributed Income

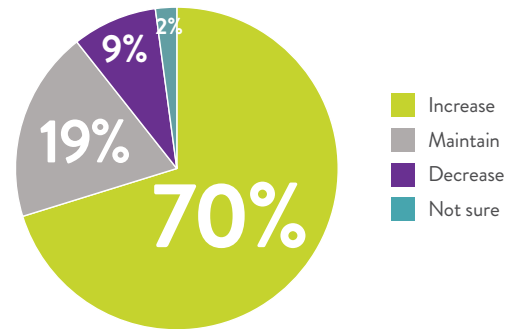
What % of total operating revenue came from contributed income in last completed fiscal year?



N=47

Orgs Expect to Increase Fundraising

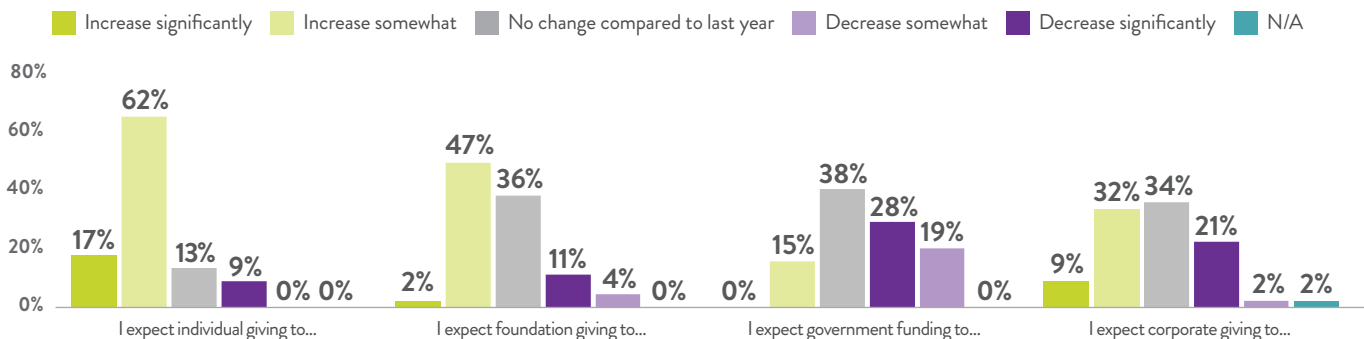
What are your projections for total fundraising this fiscal year?



N=47

Orgs Expect Increase in Individual & Foundation Giving

Do you expect a change in your fundraising mix compared to last year?



N=47