ADVISORY BOARD for the ARTS

*Transforming Arts Organizations Worldwide*

# Arts Organization Leader Benchmarking

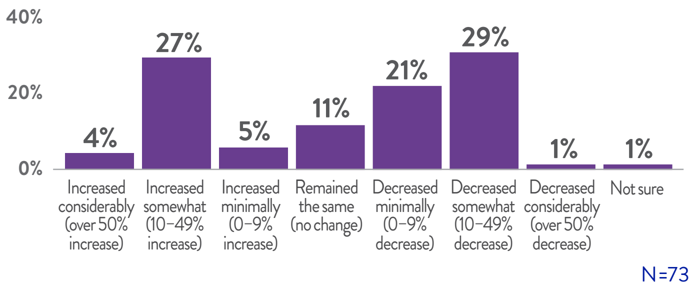
**MAY 16, 2023**

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 **May 1–10, 2023**. This is the seventy-third survey of the series and was designed to help arts leaders benchmark themselves on the current state of single ticket sales, filled hall capacities, subscriptions, and no-show rates across the performing arts sector today compared to 2019 (pre-pandemic).

## SINGLE TICKET SALES & HALL CAPACITY

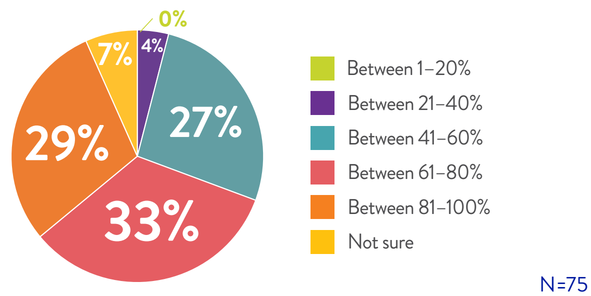
### Slight Skew Towards Decreased Single Ticket Sales This Year Compared to Pre-Pandemic

Single Ticket Sales in FY23 v. Last Pre-Pandemic Year (2019)



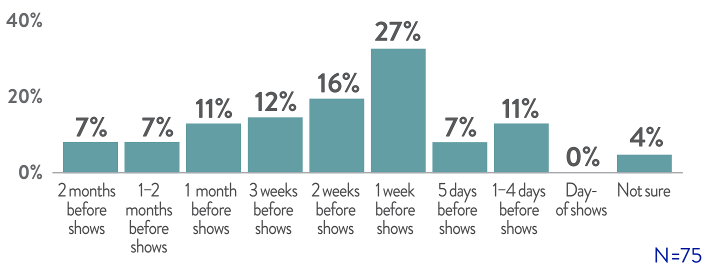

### Pre-Pandemic, Orgs Typically Ranged from 41% to 100% of Hall Capacities

Average % of Filled Hall Capacity During Last Pre-Pandemic Year (2019)



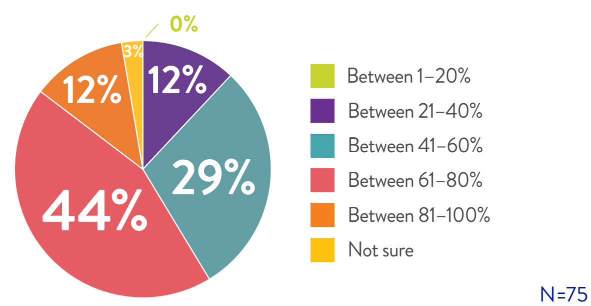

### Plurality Sell the Most Tickets One Week Before Shows

Average Timeline of When Most Single Tickets are Sold for Events/Performances




### In FY23, Orgs Are More Ranging Between 41% and 80% Capacity

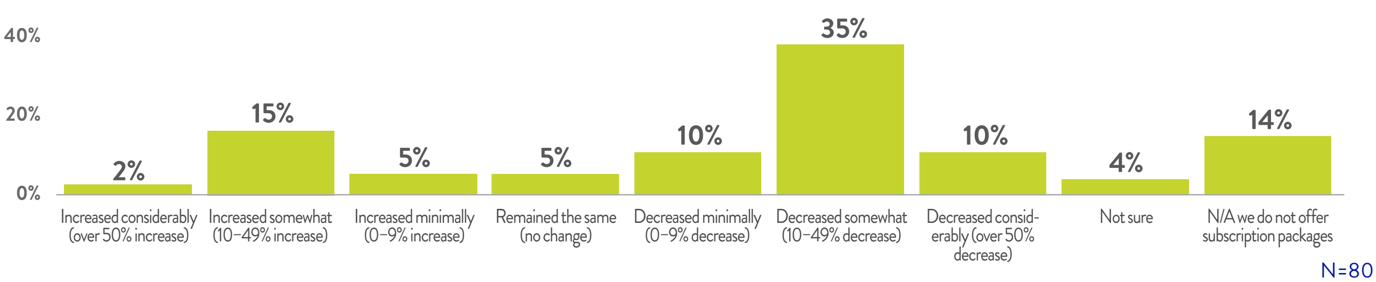
Average % of Filled Hall Capacity During Current FY23 Season




## SUBSCRIPTION SALES

### Skew Towards Decreased Subscription Sales This Year Compared to Pre-Pandemic

Subscription Sales in FY23 v. Last Pre-Pandemic Year (2019)



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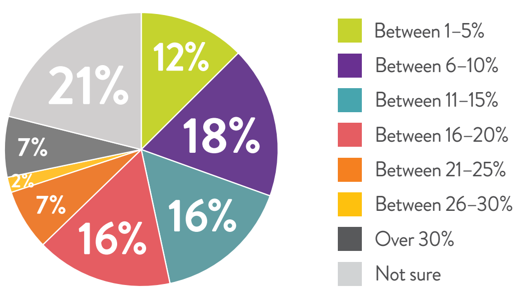
## SUBSCRIPTION SALES

### Range in Percentage of Current New-to-File Subscribers

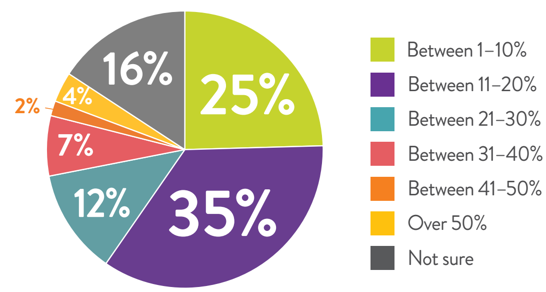
% of Org's Current Subscribers Who Are First Time Subscribers




N=56

### Majority of Orgs Experienced Up to 20% of FY22 Subscribers Not Renewing

% of FY22 Subs Who Have Lapsed and Not Returned as FY23 Subscribers

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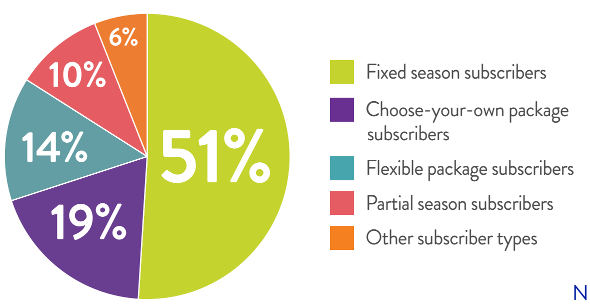
### Half of Orgs' Subscriber Mixes Tend to be Fixed Season Subscribers

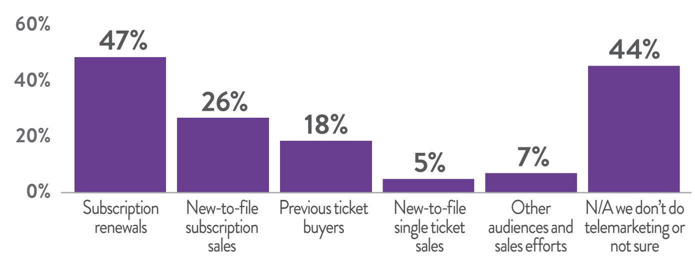
% Split of Org's Overall Subscribers Across Different Subscription Types




N=52

### Telemarketing Tends to Be Reserved for Selling Subscriptions and Tickets to Previous Buyers

Audience Types for Which Telemarketing is Used for Sales Efforts

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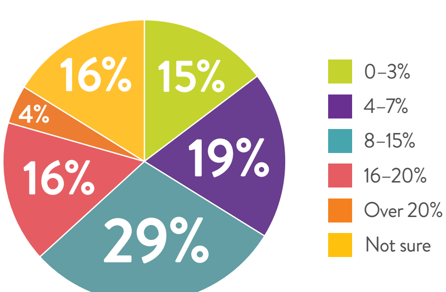
## NO-SHOW RATES

### Range in No-Show Rates

Average No-Show Rate for Performances

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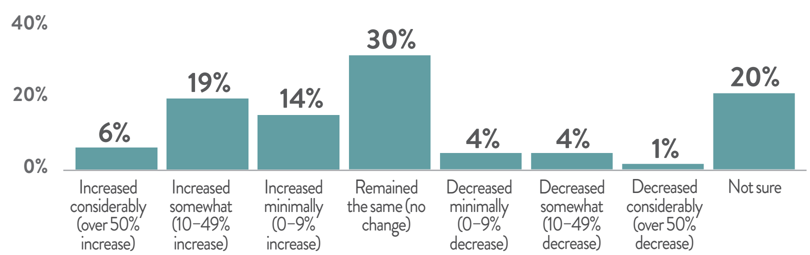
### Skew Towards Increased No-Show Rates This Year Compared to Pre-Pandemic

Average No-Show Rate Currently v. Pre-pandemic




N=69

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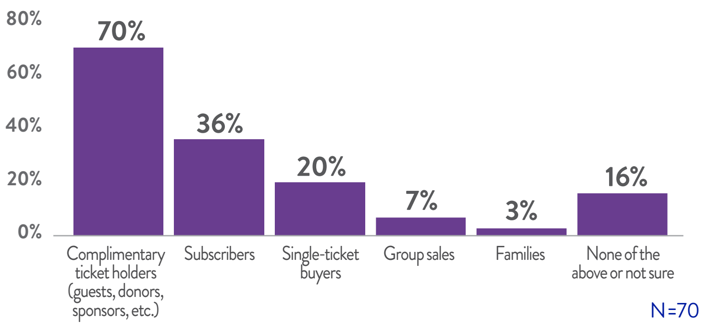
## NO-SHOW RATES

### Majority Find Complimentary Ticket Holders to be No-Show; Subscribers to Follow

Top 2 Audiences Most Likely to Not Show Up to Events

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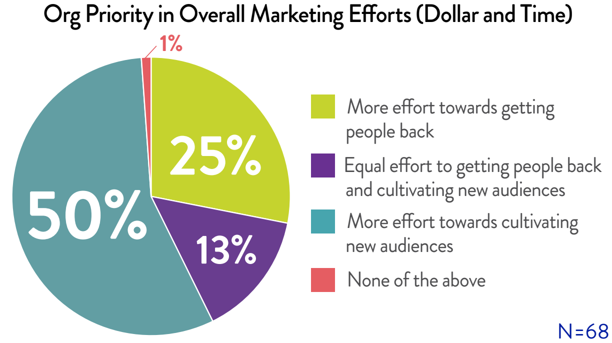
### Half Are Investing Resources in Cultivating New Audiences Over Getting People Back

Org Priority in Overall Marketing Efforts (Dollar and Time)

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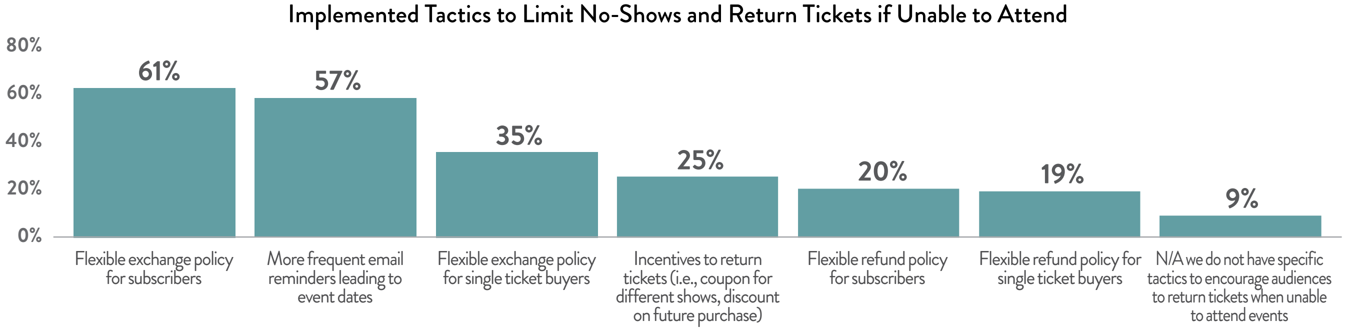
### More Flex Exchange Policies Are Available for Subscribers than Single Ticket Buyers

Implemented Tactics to Limit No-Shows and Return Tickets if Unable to Attend

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### Successful Tactics Implemented to Encourage Audiences to Return Tickets If Unable to Attend

Returned tickets can either be exchanged for another upcoming show or can be a donation.

*Put their purchase price on gift cards for future use for membership, tickets, and concessions.*

Full refund on any ticket returns up to 24 hours prior to curtain — no questions asked.

We convert them to donations.

We offered a no-risk booking policy during pandemic — they can get a full refund if wanted.

*We have shifted our subscription model, so that people must pick and choose the in-person tickets they'd like to add to their subscription on top of our digital options. This has greatly decreased no-shows because people are able to make their own choices on their own timeline, giving them the flexibility we've seen audiences want.*