

# Arts Organization Leader Benchmarking

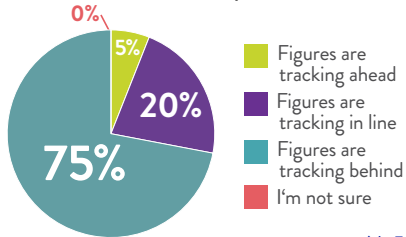
SEPTEMBER 27, 2022

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 **September 15–23, 2022**. This is the fifty-eighth survey of the series and was designed to help arts leaders benchmark themselves on overall attendance rates, single ticket and membership/subscriptions sales, direct mail campaigns, and ongoing COVID-19 protocols that may be impacting returning audiences.

## AUDIENCE/VISITOR NUMBERS

### Majority are Still Not at Pre-COVID Audience Levels

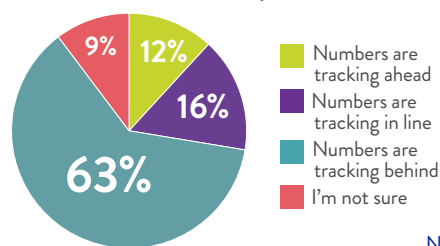
Overall Attendance Figures This Year v. 2019 (pre-COVID)



N=59

### Over Half Have Fewer Subscriptions/Memberships Than Pre-COVID

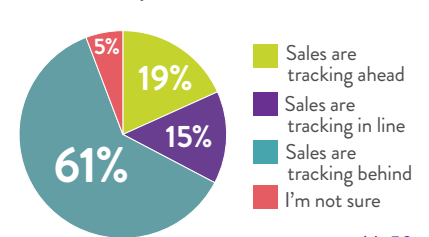
Subscription/Membership Numbers This Year v. 2019 (pre-COVID)



N=57

### Similarly, Single Tickets are Also Behind Pre-COVID Levels

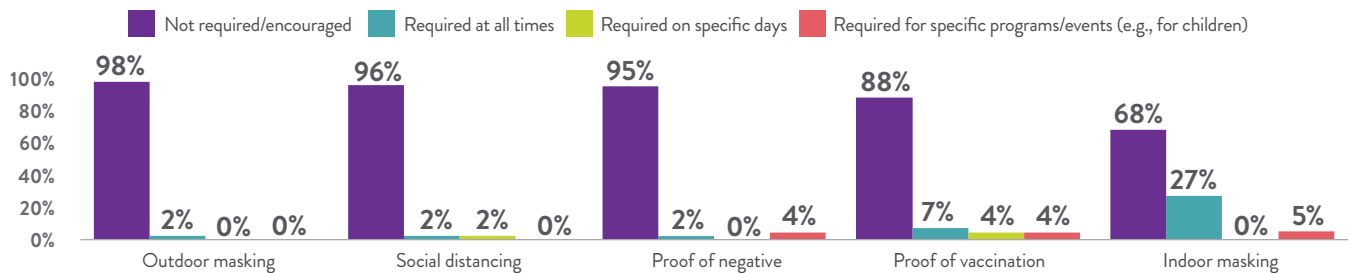
Single Ticket Sales This Year v. 2019 (pre-COVID)



N=59

## Almost All Are Not Requiring COVID Safety Procedures Anymore, Except Indoor Masking

Requirement Level of Various COVID Safety Protocols

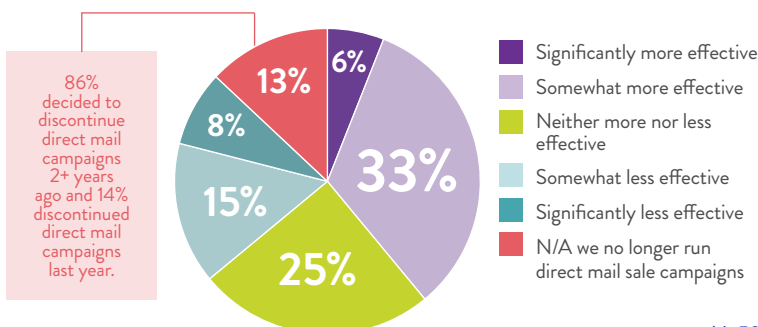


N=57

## DIRECT MAIL PERFORMANCE

### Direct Mail Has Variety of Success on Subscription and Ticket Sales

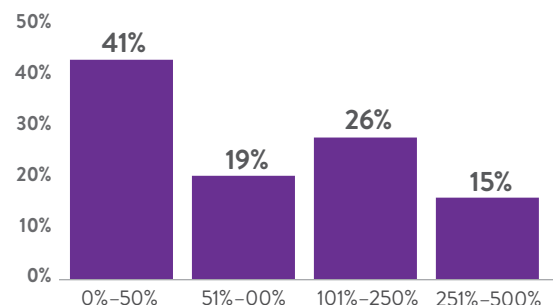
Impact of Direct Mail on Subscription and Ticket Sales This Year v. Last Year



N=52

### Plurality Have Higher Costs than Sales for Direct Mail Ticket Campaigns

ROI Range for Recent Direct Mail Ticket Campaigns



N=27

86% decided to discontinue direct mail campaigns 2+ years ago and 14% discontinued direct mail campaigns last year.

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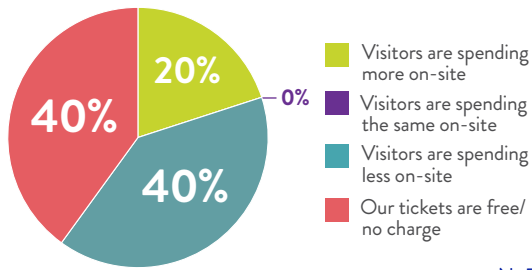
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## RETAIL & MEMBERSHIPS\*

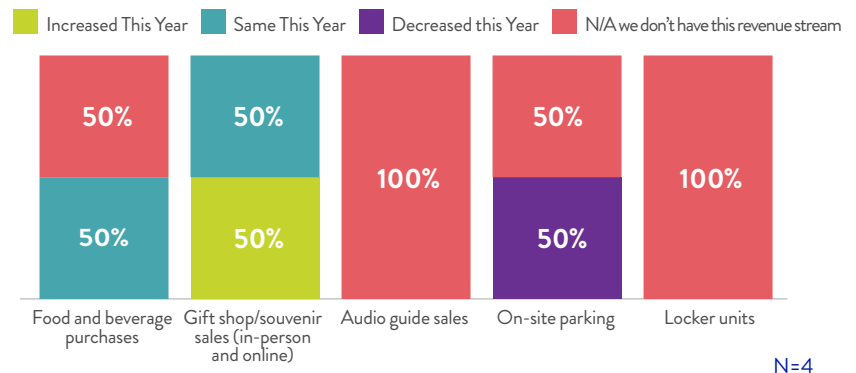
\*Museum and Cultural Organizations Only

### 80% of Visitors Are Spending the Same or Less On-Site Than Tickets

On-site Spending Compared to Ticket Purchases

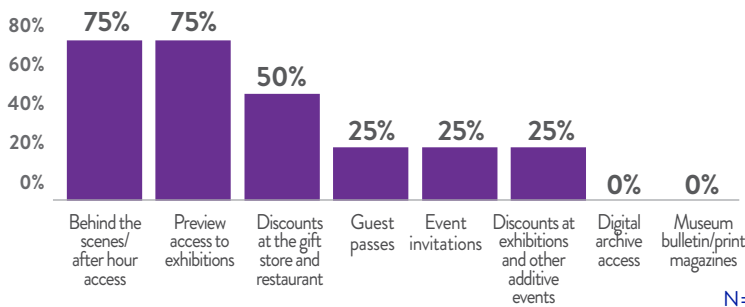


### Revenue of Retail and On-Site Items This Year v. Last Year



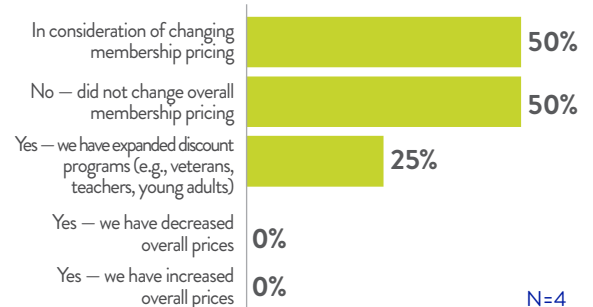
### Visitors Most Impressed by Behind the Scenes and Exhibition Preview Access

Top 3 Visitor Preferences In Membership Packages and Benefits



### Half Are Considering Changing Membership Pricing

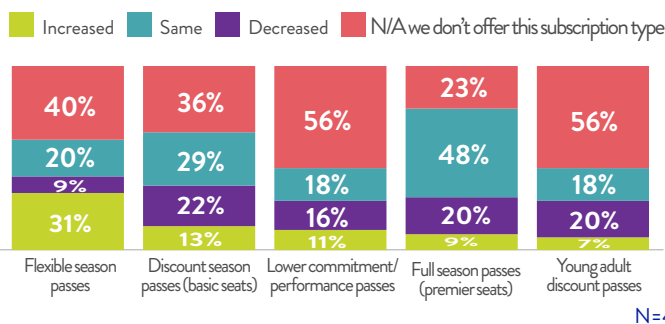
Changes Made to Overall Membership Pricing



## SUBSCRIPTIONS\*

\*Performing Arts Organizations Only

### Changes in Various Subscription Types This Year v. Last Year



### 30% Have Implemented New Subscription Pricing Tiers This Year

Changes Made This Year to Subscription Packages and Offers

