

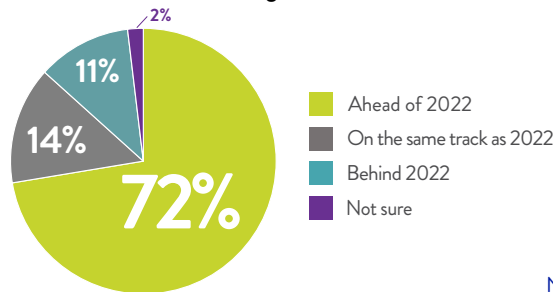
APRIL 4, 2023

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 **March 20–29, 2023**. This is the seventieth survey of the series and was designed to help arts leaders benchmark themselves on new to file audiences, subscription packages and renewal rates, marketing budgets and staff trends, as well as any recent innovations and changes to enhance the audience experience.

## OVERALL ATTENDANCE FIGURES

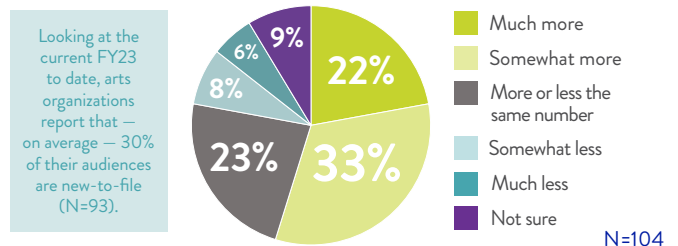
### Three-Quarters Are Doing Better in Attendance Numbers This Year than Last

Current Audience Figures v. Those of 2022



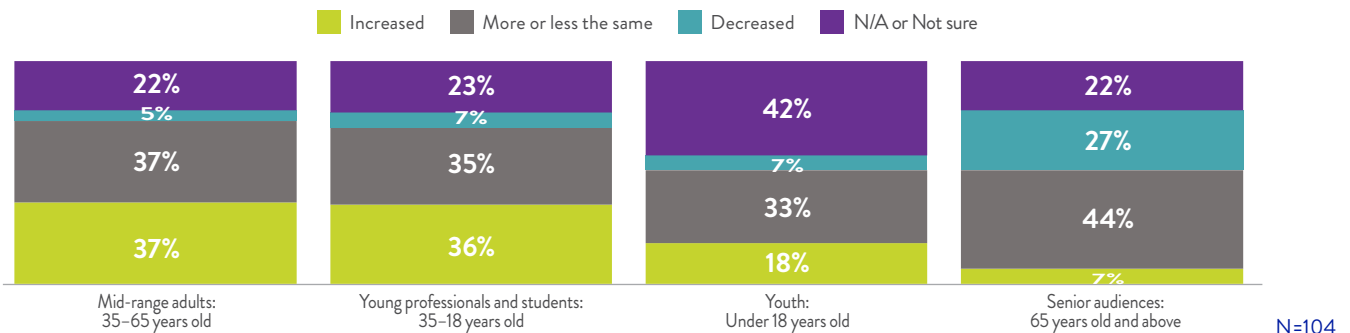
### Over Half Have Larger Percentages of New to File Audiences Than Pre-Pandemic

Change in % of New to File Audiences in 2023 Compared to Typical Pre-Pandemic Year



## Highest Increases in Young Professionals and Mid-Range Adults in 2023

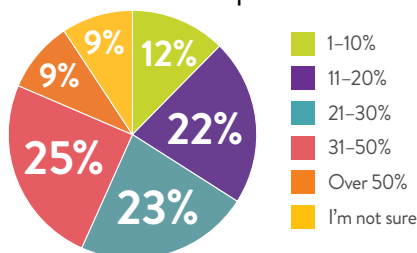
2023 Audience Numbers for Age Brackets v. 2022



## SUBSCRIPTIONS: REVENUES + RENEWALS

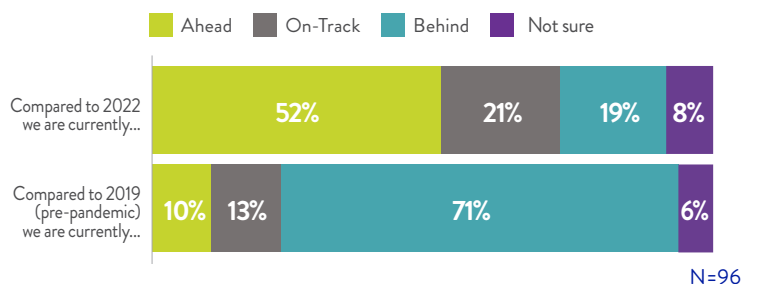
### Range in Weight of Subscription Sales within Total Earned Revenue

% of Total Earned Revenue From Subscription/ Membership Sales (FY22)



### Although Arts Orgs Are Ahead of Last Year, Subscription Sales are Behind Pre-Pandemic Trends

Current Subscription Sales v. 2019 and 2022



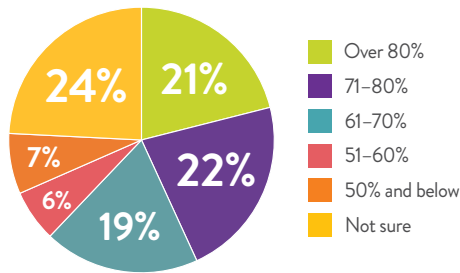
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## SUBSCRIPTIONS: REVENUES + RENEWALS

### Majority Saw Over 60% Subscription Renewal Rates in 2023

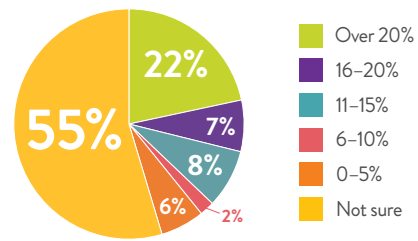
% of 2022 Subscribers Who Renewed Subscriptions for 2023 Season



N=95

### One-Fifth of Orgs Saw Over 20% of Subscribers Renew at a Higher Package in 2023

% of 2023 Renewed Subscribers that Renewed at Higher-Valued Package for 2023

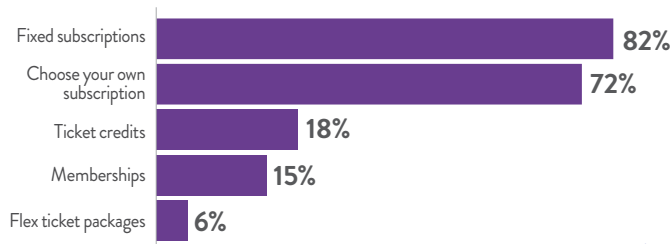


N=97

## SUBSCRIPTIONS: OVERALL PACKAGES

### Fixed Subscriptions and Choose Your Own are Most Prevalent Packages

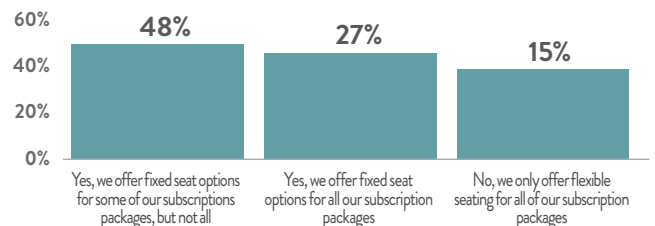
Types of Subscription Packages Currently Offered to Audiences



N=94

### Varied Ways of Implementing Fixed/Flex Seating Among Sub Packages

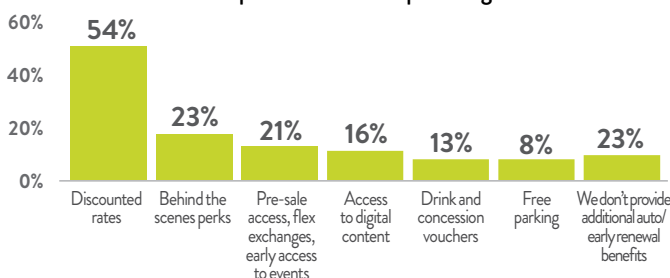
Fixed Seat Options as Part of Subscription Packages



N=92

### Discounted Ticket Rates Most Popular Additional Benefit for Early Sub Renewals

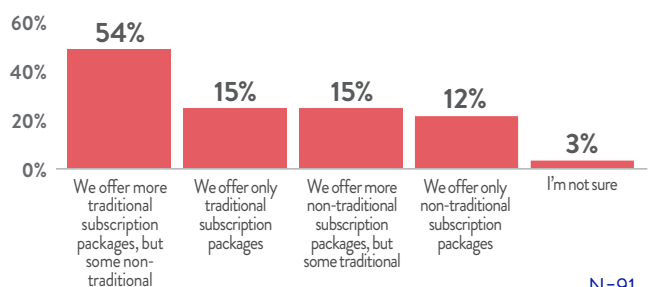
Additional Benefits Provided for Auto/Early Renewals on Subscription/Membership Packages



N=92

### Half of Orgs Offer More Traditional Packages, with Some Non-Traditional

Current Mix of Subscription Packages Between Traditional and Non-Traditional Offers



N=91

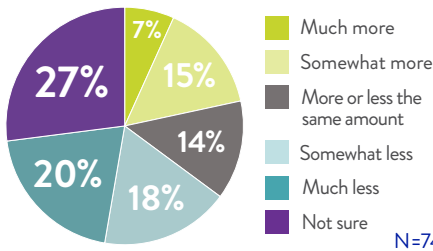
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## SUBSCRIPTIONS: NON-TRADITIONAL PACKAGES

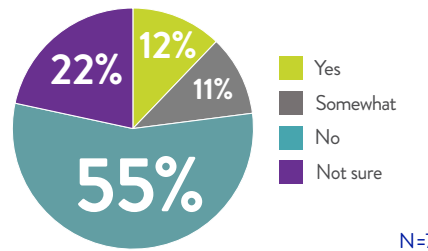
### Range in How Non-Traditional Package Renewals Perform Against Traditional

Renewal Rates for Non-Traditional Packages v. Traditional Packages



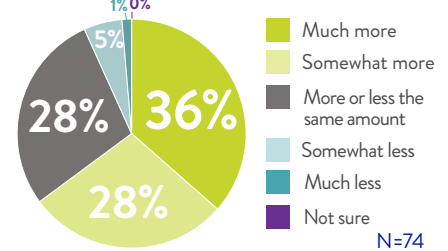
### Half Don't See Cannibalization of Subs Between Traditional and Non-Traditional Packages

Are Non-Traditional Packages Cannibalizing Subs Away from Traditional Packages?



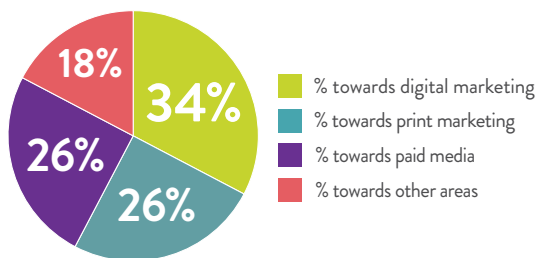
### Over Half Think Non-Traditional Packages Will Gain Importance in Org's Future

Role of Non-Traditional Subscriptions in Org's Future Overall Subscription Mix



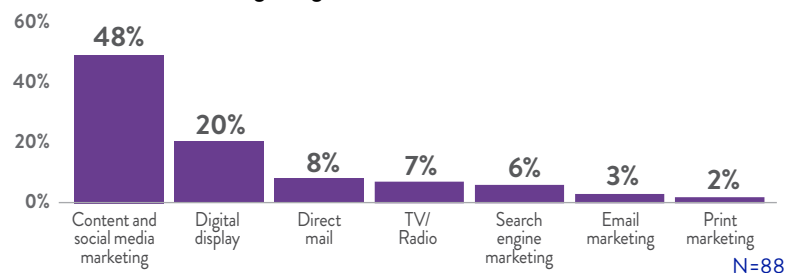
## MARKETING: BUDGET, SPENDING, + STAFF

### % of Marketing Budget Allocated to Different Marketing Subcategories



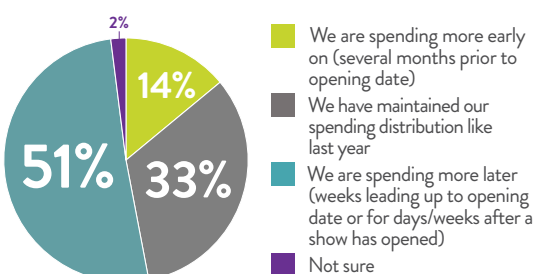
### About Half Have Increased Social Media Budgets the Most

Area Where Marketing Budget Has Increased the MOST in Past 12 Months



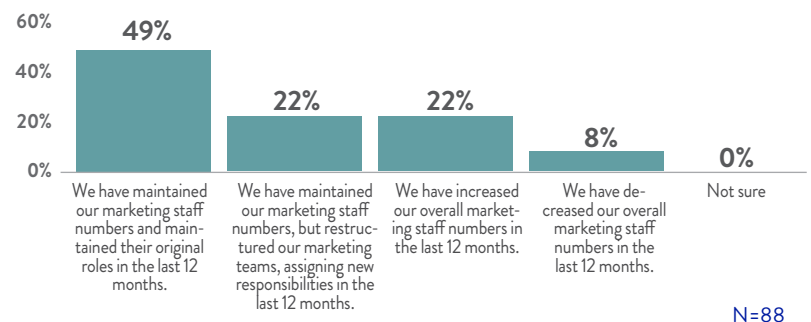
### Half are Spending Marketing Budget Closer to Events Than Last Year

Current Marketing Spend Timeline on Events v. Last Year



### Majority Have Maintained or Increased Marketing Staff

State of Marketing Personnel Within the Last 12 Months

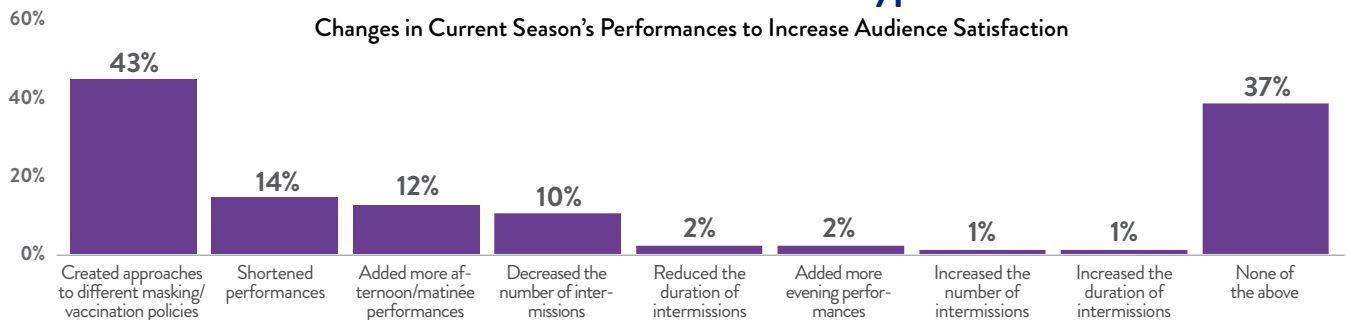


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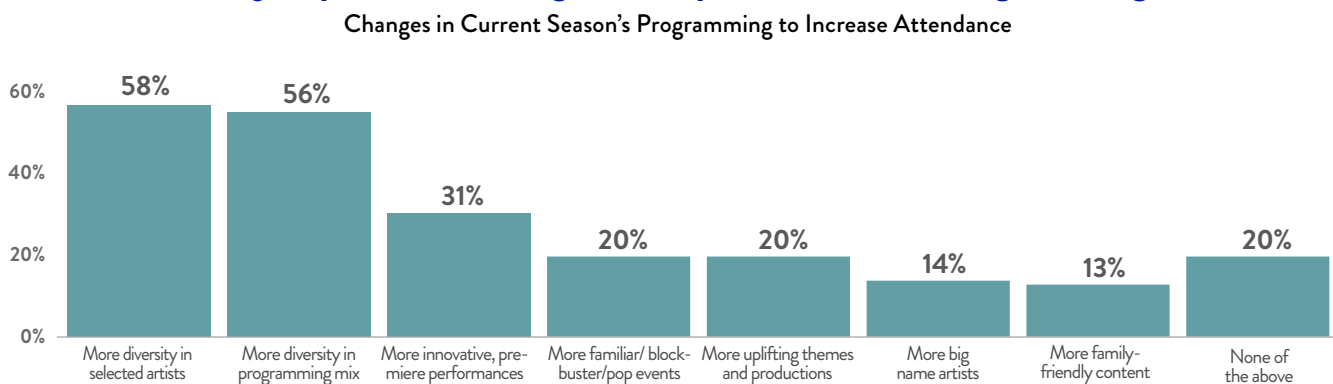
## AUDIENCE EXPERIENCE & PERFORMANCES

### Plurality Have Focused on Creating Masking/Vaccination Policies for Different Performance Types



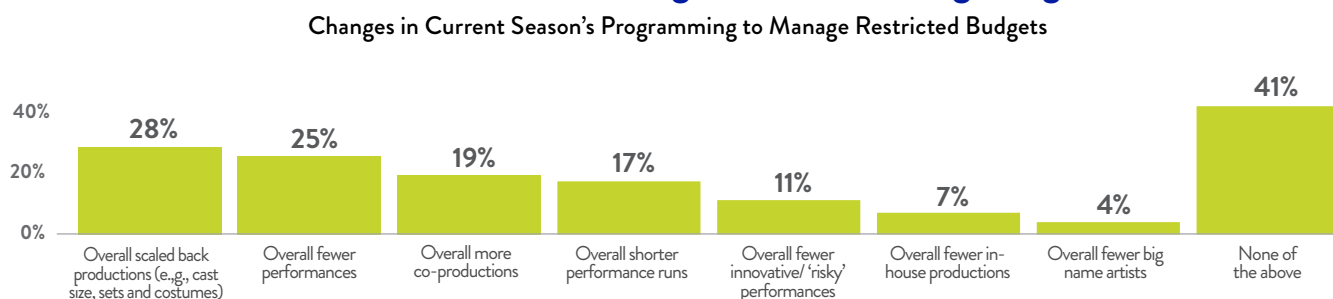
N=84

### Majority Are Increasing Diversity of Artists and Programming



N=85

### One-Quarter Have Scaled Back Productions; 40% Have Made No Changes to Preserve Org Budget



N=81