Looking Forward - Acting Now

League of American Orchestras
Conference 2014
Marketing Constituency Meeting
Agenda

Subscription and ticket buying trends

Donations trends

Implications and actions for an evolving patron base
- what’s working; what isn’t
- what’s impeding progress
- what have we yet to learn
Sources

Patron Growth Initiative database (FY06-FY11)
- orchestras offering Fixed and CYO subscriptions in all six years (ATL, BSO, CSO, CIN, HOU, NYP, POA, PSO)
- buyer households (N=625,912 HHs)
- generational analysis from survey data (N=16,000 HHs)

Marketing Directors
- in-depth interviews (CSO, CIN, NYP, NJSO, STL, JSO, OCO)
- online survey (N=16)

A&E industry scan

Note: Projected household trend lines in reported in this document are based solely on the average constant rate of change observed between FY06 and FY11 for the above orchestras. These are provided as a very rough estimate of what the distribution of buyer households might look like in 2020. Orchestras are encouraged to develop their own projections based on their data.
### Generational Cohort Aging Trends

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<th>2010</th>
<th>2015</th>
<th>2020</th>
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“Sustaining an audience is hard. It demands a consistency of thought, of purpose, and of action over a long period of time.”

Bruce Springsteen
Subscription and Ticket Buying Trends
Total Buyer Households

Total audience is growing - buyer households are up 13% since FY06.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)
Total Buyer Households by Buyer Type

Fixed Subs are on rapid decline; CYO and STB HHs are up.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)

- NYP accounted for 66% of CYOs in FY06; CYO +190% with NYP excluded
- NYP STBs +55%; STBs +22% with NYP excluded
Distribution of Total Buyer HHs

Fixed Subs are 26% of all Buyer HHs, down from 38% in just five years.
Status Quo Projection of Buyer HHs

At FY06-11 rate of change, Fixed Subs could represent a fraction of all buyer households by 2020.

Based on avg. constant rate of change per year

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)
Fixed Subs continue to account for the bulk of ticket revenue, but down 19% by FY11.
# of Concerts Purchased and Average Spent/Yr
Fixed Subscribers

Core Fixed Subs maintaining high concert purchases and spending more for tickets.

Average #: 7.7 7.6 7.8 7.8 7.9 8.0

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)
# of Concerts Purchased and Average Spent/Yr

CYO Subscribers

Average # of concerts and spending much lower for CYOs but ticking up.
# of Concerts Purchased and Average Spent/Yr

Single Ticket Buyers

Vast majority of STBs purchase one concert with very low average ticket sales. Flat through FY11.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)
Fixed Subscriber Migration Pattern
FY06 Fixed Subscribers

Fixed Subs much more likely to lapse than purchase CYOs or single tickets. Strong cumulative effect.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)

N=53,137 HHs
Fixed Subscriber Migration Patterns
FY06 Early Silents

Lapsing is not necessarily age-related attrition. Early Silents have had highest retention. (but now 80+ yrs old)
Fixed Subscriber Migration Patterns
FY06 Late Silents

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data

N=455 FY06 Fixed Subs
Fixed Subscriber Migration Patterns
FY06 Baby Boomers

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data

N=532 FY06 Fixed Subs
Fixed Subscriber Migration Patterns
FY06 Gen Xers

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data

N=51 FY06 Fixed Subs

Fixed HHs
CYO HHs
STB HHs
Lapsed HHs
Buyer HHs FY06 vs. FY11
By Generational Cohort

Fixed Subs are declining portion of HHs across all generations. CYO is growing.
CYO Subscriber Migration Pattern
FY06 CYO Subscribers

CYO Subs lapse at higher rates than Fixed Subs.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)
CYO Subscriber Migration Patterns
FY06 Silents

CYO to Fixed upgrading among Silents.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data

N=67 FY06 CYO Subs
CYO Subscriber Migration Patterns
FY06 Baby Boomers

Same pattern of higher lapsing among younger cohorts.
Higher retention among Fixed Subs primarily due to tenure. New Fixed and CYO Subs lapse at similar rates.

**FY10 Subscription Type:**

- **Fixed Subscribers**: 44%
- **CYO Subscribers**: 56%

**FY11 Buyers:**

- **Fixed Subscribers**: 47%
- **CYO Subscribers**: 7%
- **Single Ticket Buyers**: 5%
- **Lapsed**: 40%

- **Fixed Subscribers**: 11%
- **CYO Subscribers**: 34%
- **Single Ticket Buyers**: 13%
- **Lapsed**: 41%

Lapse at same rate
Primary Reasons for Purchasing a Subscription

Newer Subs more program/discount driven than tenured subs; seat retention is far less motivating.

PGI Survey respondents
Virtually all reported offering CYOs. Most market CYOs ‘openly and aggressively’ (71% top-2 box).

**CYO Offer Timing**

- During sub renewals: 13%
- With sub acquisitions: 7%
- Few months into sub campaign: 33%
- With single tickets: 27%
- Other: 20%

**CYO Sales Trends Over Last Five Years**

- Up significantly: 33%
- Up slightly: 47%
- About flat/up and down: 20%
- Sown slightly: 0%
- Down significantly: 0%
Trend towards offering earlier than in the past

Typical discount same or lower than fixed subs (evenly split)

Differing approaches to CYOs:

“What we’ve seen with subs is that fixed aren’t going away any time soon. We have a good base with a very slow rate of attrition.” (lower discounts, no free ticket exchange, aggressive upgrading to fixed)

“We don’t want people shifting to smaller packages.”

“Our philosophy on CYOs is that if a patron is more satisfied with their concert experiences they’re more likely to come back.” (offer early on with same discount as fixed)

“I think it should be much earlier so we don’t lose people.”
Compose Your Own Series and save!

Buy any 3 or more concerts for as little as $19 each!
Hear the concerts you want to hear, where you want to hear them.

You’re in for a magical season of music—as you like it! Curate your own season of concerts, with treasured favorites and delightful discoveries performed with virtuosity and passion by an international roster of gifted artists and conductors and the superb players of the New Jersey Symphony Orchestra. With 59 performance dates in six marvelous venues, you’re sure to find the music you love!

Want some suggestions?
Here are 5 packages we love:

1. Orchestral Blockbusters
2. Marvelous Mozart
3. Concerts Featuring String Soloists
4. Beethoven & Brahms
5. Piano Powerhouses

HOW TO BUY

Review the package suggestions above or browse through the full list of 2014–15 season events below and choose any three or more concerts. Then, click here to order online or, for personal assistance, call 1.800.ALLEGRO (255.3476) and press option 3 for the Ticket Office. Special seating requests can be noted both online and by phone, but choose-your-own seat functionality is not available for Compose Your Own Series at this time.

BUY NOW
Pushing full subscriber benefits

Choose 3 or more concerts that fit your schedule and budget and order today.

**Subscriber Benefits:**

- **Best Seats:** You’ll be seated before the general public.
- **Best Price:** Save off regular box office prices. Plus you can continue to buy at a discount now and all season long.
- **Free Ticket Exchange:** Schedule conflicts are no problem for subscribers. Just exchange your subscription tickets easily and quickly online or over the phone. There are no exchange fees for subscription tickets, saving you $10 per ticket exchange.
- **Invitations and Access:** Invitations to Q&A’s with Music Director Alan Gilbert, members of the Orchestra and guest artists.

Order by July 1 for these additional benefits:

- A Free Drink at intermission*
- Two Free Tickets to an Open Rehearsal*

*per subscription purchase

How it Works:

Look for the icon next to a concert and add it to your cart. Simply follow the directions in the shopping cart and enter the promo code CREATE3 at checkout.
Distribution of Total Buyer HHs
Generational Cohorts

Boomers account for greatest share of HHs, Millennials showing growth. Average age dropping over time.

Mean Age: 57.5  55.4  54.0  51.5  54.0  53.4

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data N = 16,076
Distribution of Total Buyer HHs
Generational Cohorts

- Millennials
- Gen X
- Boomers
- Late Silents
- Early Silents

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO)
Status Quo Projection of Buyer HHs
Generational Cohorts

By FY2020 Millennials could make up almost one-third of buyer HHs and Early Silents just 2%.
Total Ticket Revenue Sourced by Generational Cohort

Boomers account for the greatest share of ticket revenue, followed closely by Silents. Early Silents down 28% in five years.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data
Average Ticket Sales
Generational Cohort Buyers

Average spending highly correlated with generation. Declining rate among Early Silents; slight uptick for Gen X and Millennials.

- Early Silents
- Late Silents
- Boomers
- Gen X
- Millennials

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data
Donation Trends
Despite erosion, donation revenue among buyer households comes largely from Fixed Subs.
Donations by Buyer Type
% Donating and Average Donation Amounts

Donation rates and donation amounts are significantly lower among CYOs and STBs.

<table>
<thead>
<tr>
<th></th>
<th>FY06</th>
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<th>FY08</th>
<th>FY09</th>
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Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); Average Donation based on 5% trimmed mean
Fixed Subscriber Migration and Donation Patterns FY10-FY11

Donation rates decline as Fixed Subs migrate from their fixed subscription.

Fixed Subscribers FY10 (N=42,597)

- Fixed Subscribers: 81%
- CYO Subscribers: 3%
- Single Ticket Buyers: 2%
- Lapsed: 14%

FY11 Buyers

- Fixed Subscribers: 81%
- CYO Subscribers: 3%
- Single Ticket Buyers: 2%
- Lapsed: 14%

FY11 Donors

- 50%
- 35%
- 23%
- 11%

Fixed and CYO Subscriptions Data (ASO, BSO, CSO, CIN, HSO, NYP, POS, PSO)
2011 Major Donors Gave $25,000+ in FY11

Less than 1% of households contributed 70% of donations in 2011. Fixed Subs are greatest share of major donors.

% of HHs and Donations

- 70% of all donations
- 473 HHs
- .8% of all donors

$77,392,247

2011 Major Donors by Buyer Type

- 51% Fixed Sub
- 31% Non-Buyer
- 13% CYO
- 4% STB

Where will those 473 households come from in ten years?

# of major donors ranges from 397 in FY09 to 483 in FY10
Total Donor HHs
By Generational Cohort

Silents' share of donor HHs is declining. Younger cohorts represent very small portion of donor base.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data
Total Donation Revenue
By Generational Cohort

Silents still represent largest share of donation revenue. (fluctuation due to major gifts)

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data
Donations by Generational Cohort FY06-11
Percent Donating

Donation rates lower with each generation.

![Bar chart showing donation rates by generational cohort from FY06 to FY11.](chart.png)

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data

Total Donors
Average Donations By Generational Cohort

Donation amounts higher with each generation.

Fixed and CYO Subscriptions Data (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data
Younger generations have far less propensity to give. Within each generation competition is significant.
Reported 2010 Donations By Generational Cohort

Giving rates of Early Silents starting to plateau.

Fixed and CYO Subscriptions Orchestras (ASO, BSO, CIN, CSO, HS, NYP, POS, PSO); PGI Survey Data

Arts institutions (other than orchestra)
Educational institutions
Public radio
Public TV
Health/human services
Orchestra
Medical research
Political organizations
Environmental organizations
None of these
Effect of Age and Buyer Type on Donation Likelihood
% Donating in FY11

Likelihood of donating strongly correlates with subscriptions across all generations.

A young fixed sub is more likely to donate than an older single ticket buyer.
Arts & Entertainment Scan
Movie Theater Sales Trends

**Ticket Sales Trends**

North American ticket sales have declined 2% annually since 2002.

**Change in Tickets and Revenue FY12 to FY 13**

Ticket prices have increased 30% since 2004.
Movie Theaters Seek to Outdo Comforts of Home

Attendance declines are even stronger among younger audiences.

“I mean, it always seems like movies get more and more expensive and it’s a choice you kind of make. “Gravity” makes sense to see on a movie screen. I’m not going to watch it on my computer, most likely.”

Major chains investing heavily in theater improvements:

- Digital and sound enhancements
- AMC adding plush leather recliners
- Cinemark has Extreme Digital Cinema brand with 72-foot-wide wall-to-wall XD screen
- Cineplex charging extra for reserved seats in two middle rows

Some analysts suggest enhancements have been in *movie-watching* and should be in the *movie-going* experience

- Investing in changes to allow for more social interaction
- Private boxes, lounge areas, preview section
Rise in Ticket Prices 2001 - 2014

On Broadway, and indeed at every level in the arts, ticket pricing is our global warming crisis, steadily rising year after year without raising true alarm and provoking meaningful action, until it threatens to swamp us all."

Howard Sherman

"A Whispered Broadway Milestone No One’s Cheering, May 28, 2014"
Broadway’s Palace Theater Makeover for ‘Holler If You Hear Me’
Broadway’s Palace Theater Makeover for ‘Holler If You Hear Me’

Before

After

Bringing the audience into the action
Pro Sports - Trouble Filling Seats

Live attendance in pro baseball, basketball and football all declined in last five years
- NFL attendance lowest since 2002
- Red Sox 820-game sellout streak ended last summer

Analysts expect continued declines: discretionary income, ticket prices, hassle, comfort of home, big screen TV’s

“Most sports can’t just depend on die-hard fans to fill up seats. They’ve had to offer a lot more than just the game.”
Mark Conrad, sports law professor Fordham University

Strategies:
- Upping the fun
  - mini theme parks, expanded menus, family fun
- Highly participatory
  - contests, kiss cam, singing, jumbotron texting
- Greater segmentation
  - fireworks nights, rock concerts, religious groups
- Technological enhancements
  - Wifi, cameras in the locker rooms
- Reducing hassle
  - improved traffic flow, easier parking, greeters
- Improving price/value
  - money-back guarantees, giveaways
Pro Hockey is the Exception - most teams selling at or over capacity

### NHL Attendance Report - 2013-14

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<th>Rank</th>
<th>Team</th>
<th>Home GMS</th>
<th>Home TOTAL</th>
<th>Home AVG</th>
<th>Home PCT</th>
<th>Road GMS</th>
<th>Road AVG</th>
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<td>15,311</td>
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Be Part of the 2014 Stanley Cup Playoffs at CONSOL Energy Center

16 Game Playoff Packages Now Available!

<table>
<thead>
<tr>
<th>Premium Seating</th>
<th>1st Round</th>
<th>2nd Round</th>
<th>3rd Round</th>
<th>4th Round</th>
<th>Per Seat Package Price (4 Home Games per Round)</th>
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<td>Club Seats (Sec 101-103, 111-113)</td>
<td>$240.00</td>
<td>$297.50</td>
<td>$369.25</td>
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| FedEx Level (Lower Bowl)      |           |           |           |           |                                               |
| First Row Glass              | $190.00   | $235.00   | $291.25   | $432.00   | $4,593.00                                    |

| Double Attack                |           |           |           |           |                                               |
| Corners Plus (Sec 104, 110)  | $165.00   | $203.75   | $252.25   | $373.25   | $3,977.00                                    |
| Corners (Sec 105, 109)       | $165.00   | $203.75   | $252.25   | $373.25   | $3,977.00                                    |
| End Zone (Sec 106-108)       | $165.00   | $203.75   | $252.25   | $373.25   | $3,977.00                                    |

| Single Attack                |           |           |           |           |                                               |
| Corners Plus (Sec 114-115, 121-122) | $165.00   | $203.75   | $252.25   | $373.25   | $3,977.00                                    |
| Corners (Sec 116, 120)       | $165.00   | $203.75   | $252.25   | $373.25   | $3,977.00                                    |
| End Zone, Rows B-R (Sec 117-119) | $145.00   | $178.75   | $221.00   | $326.50   | $3,485.00                                    |
| End Zone (Sec 117-119)       | $140.00   | $172.50   | $213.00   | $314.50   | $3,360.00                                    |

| 84 Lumber Level (Upper Bowl)  |           |           |           |           |                                               |
| Center (Sec 202-203, 219-220) | $98.00    | $120.00   | $147.50   | $216.25   | $2,327.00                                    |
| Sidest, Rows A-E (Sec 201, 204, 218, 221) | $98.00    | $120.00   | $147.50   | $216.25   | $2,327.00                                    |
| Sidest (Sec 201, 204, 218, 221) | $98.00    | $120.00   | $147.50   | $216.25   | $2,327.00                                    |
New York Philharmonic/Lincoln Center have hired Pittsburg Penguins’ customer service training consultant.
Implications and Actions
Driving Ticket Sales Over Next 5-10 Years: Greatest Success Factors

1. Programming (mentioned by virtually everyone)
2. Engagement/relationship building
3. Concert/patron experience
4. Buyer reactivation/retention/frequency

“Programming, plus our ability to make things relevant and participatory for listeners.”

“Engaging new audiences (including Baby Boomers and Millennials) through programming and a complete experience (including pre-concert and intermission lobby experience). Flexibility in how patrons can purchase tickets (i.e. less planning ahead, better technologies including mobile).”

“ENGAGEMENT is the new marketing. Greater collaboration across marketing, development, community engagement and artistic to a.) create concert experiences that compel attendance and b.) engage the community in new ways and become about more than just the music.”

“Subscriptions: Relationship building, nurturing/appreciation, incentives to drive frequency, deeper focus on multi-single ticket buyers and new subs, catching people BEFORE they lapse.”

Group 1-2 Marketing Directors Interviews/Survey, May 2014
Driving Ticket Sales Over Next 5-10 Years: Greatest Obstacles

1. Programming
2. Internal operations/limited resources
3. Relevancy/interest in classical music
4. Lifestyle/demographic shifts
5. Subscription model
6. Pricing

“Lack of a holistic approach to programming and the customer experience. Increasing cost of doing business, which drives up prices. Overall decline in interest in classical music. Changing demographics.”

“1). RELEVANCY. As a colleague said, "we're losing relevancy by the second."

“Perceptions that people should subscribe because they used to.”

“The ability of the organization to adapt to changing purchase behaviors (for example, in defining a subscription, we may need to consider treating multi-STBs as subscribers if they purchase, say, 4 concerts in one season, even if those concerts are not all purchased at the same time)."

“And, the behemoth in the room: work rules that do not foster creativity, innovation, or adaptation to address the issues at hand.”

Group 1-2 Marketing Directors Interviews/Survey May, 2014
Subscriptions/Ticket Buying
Subscriptions/Ticket Buying

Fixed subscriptions are declining across all generations

Rate of decline may be even steeper in the next five years as Early Silents age-out

Donation likelihood closely tied to subscriber relationship across all age cohorts
- critical to maintain these relationships as long as possible
- love, love, love Silents and don’t forgo Boomers
- greater retention focus to longer term subs
- CYOs may be more of a savior than villain
- need better handle on why subs totally lapse out
- identify key indicators of lapsing
- test alternative subscription models

Incentivizing subscriptions and frequency
- role of benefit packages vs. intermittent reward
- alternative reward structures (frequency/multi-buyers, customizable)
- increased benefit relevance (e.g. by age, tenure)
Subscriptions/Ticket Buying

Moving to younger, more transactional, more price-sensitive patron base

- continued focus on increasing frequency critical
- greater emphasis on multi-buyers
- first timer buyers - what got them there; best prospects for return
- more work on pricing/price elasticity by generation
- improved ticket buying technology

Marketing expenses apt to rise with larger single ticket buyer base

- continued shift to digital media
- working smarter, not harder
- increased datamining and data rigor
- metrics, A/B testing, data appends, dashboards
Programming and the concert experience
### Practicalities of Growth

**Volume** (Attendance)

- **Penetration** × **Frequency**

#### Key Concepts

- **Awareness**: Do I know who you are/what you do?
- **Relevance**: Do you matter to me? Do I believe in you?
- **Fit**: Do you fit easily into my life?
- **Enjoyment**: Do I enjoy what you do? Am I fulfilled?
- **Connection**: Do I feel close and valued by you?
- **Value**: Are you worth my time, energy, money?
Increasing frequency among broader population is a significant challenge given personal preferences.
Most Preferred Type of Arts Performance
Grand Rapids Symphony

- Classical concerts
- Broadway musicals
- Pops concerts

- Current Subs
- Lapsed Subs
- Current STBs
- Lapsed STBs
- Non-Attenders
Most Preferred Type of Arts Performance
New Jersey Symphony Orchestra

- Classical music concerts
- Broadway shows/musicals

Loyal Subs: 60%
Light Subs: 50%
Multi-Buyers: 47%
Uncommitted STBs: 36%
Lapsed/Non-Attenders: 23%
Target Non-Aware: 10%

Classical music concerts:
- Loyal Subs: 60%
- Light Subs: 50%
- Multi-Buyers: 47%
- Uncommitted STBs: 36%
- Lapsed/Non-Attenders: 23%
- Target Non-Aware: 10%

Broadway shows/musicals:
- Loyal Subs: 10%
- Light Subs: 16%
- Multi-Buyers: 18%
- Uncommitted STBs: 26%
- Lapsed/Non-Attenders: 40%
- Target Non-Aware: 53%
Perceived Quality of Orchestra Performances
Ratings among Orchestra Patrons

Quality perceptions correlate with orchestra size...
Enjoyment of Recent Concert Experiences
Ratings among Orchestra Patrons

... but not necessarily actual concert enjoyment. There’s more to the equation than musical excellence.
Orchestras are actively pursuing a wide range of concert formats/experiences.

- **Performances with local businesses**
  - 7%
- **Contemporary classical-electronica concerts**
  - 14%
- **Concerts with social cause/civic element**
  - 14%
- **Contemporary music series/special events**
  - 14%
- **Live concert webcasts**
  - 14%
- **Semi-staged Broadway shows**
  - 21%
- **Educational/discovery formats**
  - 29%
- **Lighting/visual effects-driven concerts**
  - 50%
- **Partnership performances with community institutions**
  - 50%
- **Venues outside primary market/neighborhood concerts**
  - 43%
- **Side-by-side concerts with musicians and patrons**
  - 36%
- **Broad-based community concerts**
  - 36%
- **Alternative/non-traditional venues**
  - 29%
- **Concerts with film**
  - 79%
- **Arts collaborations/multi-disciplinary concerts**
  - 64%
- **Educational/discovery formats**
  - 64%
- **Broad-based community concerts**
  - 57%
- **Casual classical formats**
  - 50%
- **Venues outside primary market/neighborhood concerts**
  - 50%
- **Lighting/visual effects-driven concerts**
  - 50%
- **Partnership performances with community institutions**
  - 43%
- **Side-by-side concerts with musicians and patrons**
  - 43%
- **Casual classical formats**
  - 43%
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  - 14%
- **Concerts with social cause/civic element**
  - 14%
- **Contemporary classical-electronica concerts**
  - 14%
- **Performances with local businesses**
  - 7%

Most haven’t ventured into semi-staged Broadway concerts or live webcasts.

Group 1-2 Marketing Directors Survey May, 2014
Target-Specific Efforts with Tailored Classical Concert Programming/Formats

- **Broad local community**: 73%
- **Baby Boomers**: 60%
- **College students**: 60%
- **Gen Xers**: 53%
- **Millennials**: 53%
- **Asian community**: 33%
- **Hispanic community**: 27%
- **Other ethnic segments**: 13%
- **African American community**: 7%

Discounted ‘Package’ Series:
- CLE - FanCards
- CSO - POST
- HS - Young Professionals Backstage
- STL - Unlimited Engagement
- KCS - Classics Uncorked

One-off Targeted Concerts:
- Chinese New Year
- Dia de la Meurtos
- Classical Roots
- Symphony with Soul

Group 1-2 Marketing Directors Survey May, 2014
GRS SymphonicBoom concerts attract young enthralled audiences for video games/fantasy. Crossed to Pops for Pixar.

I have only attended the Legend of Zelda: Symphony of the Goddess and it was the single most amazing concert I have ever been to.

Watching a feature film being scored live is beyond enjoyable, it is unforgettable!! I would watch every movie that way if I could.

Mean Age
- 39
Mean Age
- 57

Grand Rapids Symphony, January 2014
“Our aim is not to have a 'broadcast' mentality, but to find ways to enjoy music together, really side by side. And this seemed like a perfect way to help accomplish that.”

James Roe, NJSO CEO (NPR)

“300 people from the audience stayed to watch and the feeling of true joy and pleasure extended from the participants to observers... It really showed us that a great concert plus a wonderful engagement event can have huge benefits across multiple audiences and metrics...”

Cathy Levin, VP Marketing
“Playing great music isn’t really going to change... but we can frame concerts that make the experience participatory and relevant, and we can have more impact on life.”

2013-14:
- Experimenting with events
  - Post-concert talk with NJ Olympian/concertmaster - being at the top of your game
  - Dance band prior to Beatles Pops concert (100+ waiting to get in at 7:00 pm)
  - Sing-along prior to Wizard of Oz (300+; kids in costume singing Over the Rainbow)
  - Post-concert side-by-side (300+)

2014-15:
- Engagement event planned for almost all concerts, built around each concert
  - Storytelling (concert featuring Petrouchka and Scheherazade)
  - Poetry reading (Russian standards read in Russian for concert featuring Rachmaninoff and Tchaikovsky; targeting significant Russian population in NJ)
  - Christmas sing-along before Holiday concerts
  - Food festival
To survive bookstores will...

- Go way beyond selling books (from eBooks to self-publishing)
- Anticipate every literary need
- Integrate technology throughout the in-store experience
- Design flexible/curated spaces
Programming

Segmentation, diversification, innovation
- alternative formats
- orchestras in secondary/less visible roles (film, semi-staged Broadway)
- collaborations/multi-disciplinary
- tech enhancements

Moving from concerts to events
- event engagement strategies
- more participatory concerts
- creating greater personal impact

Greater focus on increasing familiarity, comfort and relevance

More audience consideration/co-creation

Less core classical programming

More non-classical and classical cross-over concerts

More non-subscription concerts
Concert/Customer Experience

Everyone is upping the customer experience/customer service game
- very high bar across many product categories
- customer service training/incentives

Moving beyond musical excellence to delivering peak experiences

Corporate culture issue - top-down, organization-wide directive
- driving change, enabling systems
- understanding concert experience from customer’s perspective
- measuring satisfaction across major touch points
- indentifying key performance indicators
Engagement and relationship building
Is your orchestra actively pursuing revenue replacement strategies?

“We are discussing revenue replacement strategies but haven’t formally implemented anything as of today. Our orchestra needs to better respond to the community that we perform in and implement more diverse offerings to increase our patron base.”

“I hate to say that we’re really not. There is a lot of talk, but the budgetary restrictions we have are a barrier to R/D. We’re not as much risk-averse as we are sitting with our hands tied. The general directive is to make sure that fund raising supports currently existing programs. That’s not really a formula for growth and expansion, and marketing, charged with developing these engagement events, is asked to do so on a shoestring.”

“We recognize this need quite acutely because we know that development cannot continue to pick up the shortfall in earned revenue. We could be a lot farther in developing a continuum of engagement and a more surgical approach towards cultivating frequency and smaller gifts.”

“Our revenue replacement strategies are really rooted in the traditional ways one would expect...Increasingly, our revenue replacement strategies need to evolve to being relevant to a much broader population base. This is reflected in our new mission/vision statement which includes a component about elevating the community.”
Brand Relationship Factors
Closeness/Attachment

- Would miss them terribly if went away
- Always recommend them to friends
- Feel strongly connected to
- Think about them often
- Feel like a part of the family

“Reminiscent of my first wife: beautiful but haughty. Does as she pleases with no regard for my opinion and freely spends my money without asking.”

“It’s like my beloved wife.”

Patron Growth Initiative
Engagement and Connections

Companies with close and personal connections with customers outperform their competitors.

McKinsey

Customers who lack emotional connections with a brand are more likely to remain focused on practical attributes that are often easily satisfied (or even replaced) by any number of products or services.

2013 Brand Engagement Study
Many engagement efforts underway.

- Personalized recognition efforts: 87%
- Newer sub retention efforts: 87%
- Musician-patron connections: 87%
- Ongoing post-concert surveys: 80%
- Participatory social elements: 80%
- Comprehensive digital strategy: 80%
- Comprehensive social media strategy: 80%
- First time buyer program: 73%
- Surprise & Delight: 73%
- Subscriber-donor appreciation events: 73%
- Personalized communications: 67%
- Recognition of longer term subs: 60%
- Non-sales communications: 60%
- Communications from musicians: 60%
- Customer experience program: 0.6%

Group 1-2 Marketing Directors Survey May, 2014
Audience Engagement/Relationship Building Efforts
% Currently Underway (Less Common Efforts)

- Young professionals packages/programs: 53%
- Audience participation activities: 47%
- Subscriber appreciation month/week: 47%
- Subscriber appreciation concerts: 40%
- Subscriber benefits of the month/bonus perks: 40%
- Personalized reps/concierge service: 40%
- Concert recommendations platform: 33%
- Customizable subscriber benefits packages: 7%

Group 1-2 Marketing Directors Survey May, 2014
Surprise & Delight - Greeting and Gifting Concert Patrons

Scope: broadly implemented in some form; organization-wide for some

Target: tends to be newer/at risk subs, although evolving
- CSO testing long term subs, first time buyers
- CIN targeting customers with issues
- CIN scanning social media to touch people based on their interests

Surprise: numerous gifts being tested
- chocolates, CDs, seat upgrades, drink coupons, discounted tickets

Reactions: overwhelmingly positive
- internal staff engagement
- audience members delighted
- some orchestras utilizing musicians; patrons blown away

Results: consistently higher renewal rates
- opportunity to uncover problems/pacify complaints

Issue: Increasing number of touches
- NYP testing S&D meet-ups
Chicago Symphony Orchestra
Surprise & Delight 2014 Renewal Rate Results

- 49% FY13 First Year Subscribers
- 55% Other Retention Efforts
- 64% Surprise & Delight in FY13
- 48% FY13 Second Year Subscribers
- 74% Surprise & Delight in FY12
- 79%
New York Philharmonic Engagement Strategy

Added Director of Relationship Marketing position
- focus: long term subs, at risk subs, first time buyers, all subs (value of subscribing)
- bridge between marketing and development

Subscriber Appreciation Month

Tested almost 20 different offers in last three seasons; follow-through based on test results
- full vs. mini offer to renewing mini subscribers
- ‘money back guarantee’ vs. ‘delight guaranteed’ messaging to NYP/prospects
- various subscription offers to lapsed subs
- private sale messaging to NYP prospects
- late season CD offer
- PURLs to first year subscribers

Personalized customer experience test underway

Customer Experience Initiative
- multi-departmental taskforce, including Lincoln Center
- six major initiatives over three years
- developing dashboard for key behavioral and csat survey metrics
- MROC: Marketing Research Online Community
New York Philharmonic Subscriber Appreciation Month Fall 2013

- 8,000 personalized thank you notes
- Free gift
- Rose for 50+ year subscribers
- Inserts recognizing 3+ year subscribers
- Insights Series invitations
- Archives visits for 50+ year subscribers
- Post-concert meet-and-greets with musicians
- 2013-2014
  - Thank you letter from Glenn Dicterow, retiring concertmaster
  - Coupon for a free gift of NYP note cards
  - Post-concert meet and greets at Arpeggio at four concerts
NYP Subscriber Appreciation Month
Renewals and Coupon Redemption Rates

Note on Seat Prior Year
No Note Prior Year

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<th>Note on Seat Prior Year</th>
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<td>Merch Discount</td>
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<td>CD Discount</td>
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<tr>
<td>Free Gift</td>
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</table>
New York Philharmonic Personalized Customer Experience Test

- 2500 subscriber HHs split into groups of 300 for each Customer Relations rep
- 1,500 1<sup>st</sup> and 2<sup>nd</sup> year subscriber with reps, 1,000 3+ year subscribers with reps, 500 1<sup>st</sup> and 2<sup>nd</sup> year subscribers for Surprise & Delight
- 1<sup>st</sup> and 2<sup>nd</sup> Year Subscriber Test groups:

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<tr>
<th>Personalized Customer Service Representative</th>
<th>Surprise &amp; Delight</th>
<th>Yes</th>
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<tbody>
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<td>Yes</td>
<td>500</td>
<td>1,000</td>
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<tr>
<td>No</td>
<td>500</td>
<td>2,000</td>
<td>2,500</td>
</tr>
</tbody>
</table>

| | | 1,000 | 3,000 |

Outbound CE Touches:
- Introductory letter with business card
- Pre-concert email
- Surprise & Delight
- Holiday/New Year’s postcard
- InTune invitation follow-up
- Subscriber Newsletter
- Courtesy calls about season announcement/renewals
- Renewal letters and emails
- Renewal calls
- Summer contact

Required Payout:
- 2.6% increase in renewals
- $20/HH increase in revenue
Customer Experience vs. Other Subscribers
Customer Service Ratings

New subs with CE reps have significantly higher scores than other new subs on customer service factors.
Purpose
• Getting closer to customer
• Active listening
• Ideation and innovation
• Mitigate risks

Membership
• Private community
• 658 members
• 65% Subs, 35% STBs

Ongoing Discussions
• Online renewals
• Changing listening habits
• Most memorable concerts

Surveys Monthly+
• One Day University concept
• Composer familiarity
• Brochure cover feedback
• Online store evaluation
• Annual Fund messaging input

Rewards
• Primarily intrinsic and thanks
• Online Q&A with Artistic Planning Director
## NYP Dashboard Prototype

### CSat Survey Metrics

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<tr>
<th>Filter Attendees</th>
<th>STBs &amp; Subscribers</th>
<th>Values to Display</th>
<th>The Two Star</th>
<th>By Program Name (filtered)</th>
<th>5 programs match these criteria</th>
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<td>Filter Programs</td>
<td>By Seasons</td>
<td>By Program Type</td>
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### Star Metrics

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<td>2%</td>
<td>33%</td>
<td>0%</td>
<td>8%</td>
<td>40%</td>
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<td>5%</td>
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<td>56%</td>
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<td>63%</td>
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<tr>
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### Arpeggio

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### Espresso Café/Lobby Bar

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### NYP Dashboard Prototype

**Buyer/Donor Transactional Metrics**

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Speaking Truth to Power, bringing music to the masses

In recent years the Chicago Symphony Orchestra has closed its seasons with multi-week spring festivals. The topics have been wildly varied: 2010, piano-focused concerts in 2012...
Orchestras as Community-Based Institutions
Funder Expectations

1. Funders will expect meaningful diversity in programming, governance and administration (emphasis on "meaningful")

2. Community involvement and relevancy will be a high priority. What benefit do you give the community beyond music in the hall or perceived economic impact.

3. There is growing expectation on accountable and transparent financial management with a focus on liquidity and successful business models.

Also better training of trustees and donors as to the unique financial practices and challenges of symphonic orchestras.

Janet Brown, Executive Director Grantmakers in the Arts
Community-wide initiative to create conversation about broader social justice/community issues through music.

- Free listening parties
- Radio broadcasts
- Educational resources
- Live performance plus broadcasts to nursing homes, hospitals, other public locations

2014 theme: Heroes
- Celebrating community heroes (volunteerism/civic engagement)
- and heroes within the featured piece (Magnard’s Hymne à la Justice)

As part of the culmination of the CSO’s second annual One City, One Symphony project, enjoy these FREE live recordings from the November 14 & 16 concerts. The downloads include the entirety of Tchaikovsky’s Symphony No. 4 and Mozart’s Davide Penitente, feature Music Director Louis Langrée conducting the Orchestra, the mighty May Festival Chorus and soloists Angel Blue, Jane Archibald, Michèle Losier and Joseph Kaiser.

These downloads have been made possible by the CSO’s partnership with 90.9 WGUC. The recordings were produced by Elaine Martone and engineered by Chelsea VandeDonk, WGUC Mastering and Production Engineer.
Cincinnati Symphony’s LumenoCity

- Highly successful, free outdoor event attracting 35,000 attenders over two nights in 2013
- Performances streamed online
- 2014 (3rd year) a 3-day festival with food, beverages, arts performances
- Free ticketed event (security reasons; will obtain thousands of new to file households)
People don't buy what you do, they buy why you do it.

Simon Sinek, Ted Talk
Most organizations talk about what they do and how they do it.

- Why you exist, why should anyone care
- How you do it
- What you do
Great organizations and leaders think, act, and communicate in the same way - starting with the why.

- Why you exist, why anyone should care
- How you do it
- What you do
If we can internally articulate the real why, what we do and how we do it might change.

If we communicate the why, we’ll give more people reason to believe.
ABOUT NIKE, INC.

NIKE, Inc. is the world’s leading innovator in athletic footwear, apparel, equipment and accessories.

OUR MISSION:
TO BRING INSPIRATION AND INNOVATION TO EVERY ATHLETE* IN THE WORLD

*IF YOU HAVE A BODY, YOU ARE AN ATHLETE

President and CEO Mark Parker said: “At NIKE, Inc. we run a complete offense, and it’s based on a core commitment to innovation. That’s how we stay opportunistic, serve the athlete, reward our shareholders, and continue to lead our industry.”
Looking Forward - Acting Now

League of American Orchestras
Conference 2014
Marketing Constituency Meeting