



ADVISORY  
BOARD  
for the ARTS

Forum Impresa Cultura Italia 2022

October 19, 2022

Roma

# The World's Most Extensive Arts and Culture Network



CARNEGIE HALL

150 YEARS AMERICAN MUSEUM OF NATURAL HISTORY



HK BALLET  
香港芭蕾舞團  
Septime Webre 甄承天  
Artistic Director 藝術總監



Tianjin Juilliard  
天津茱莉亚学院



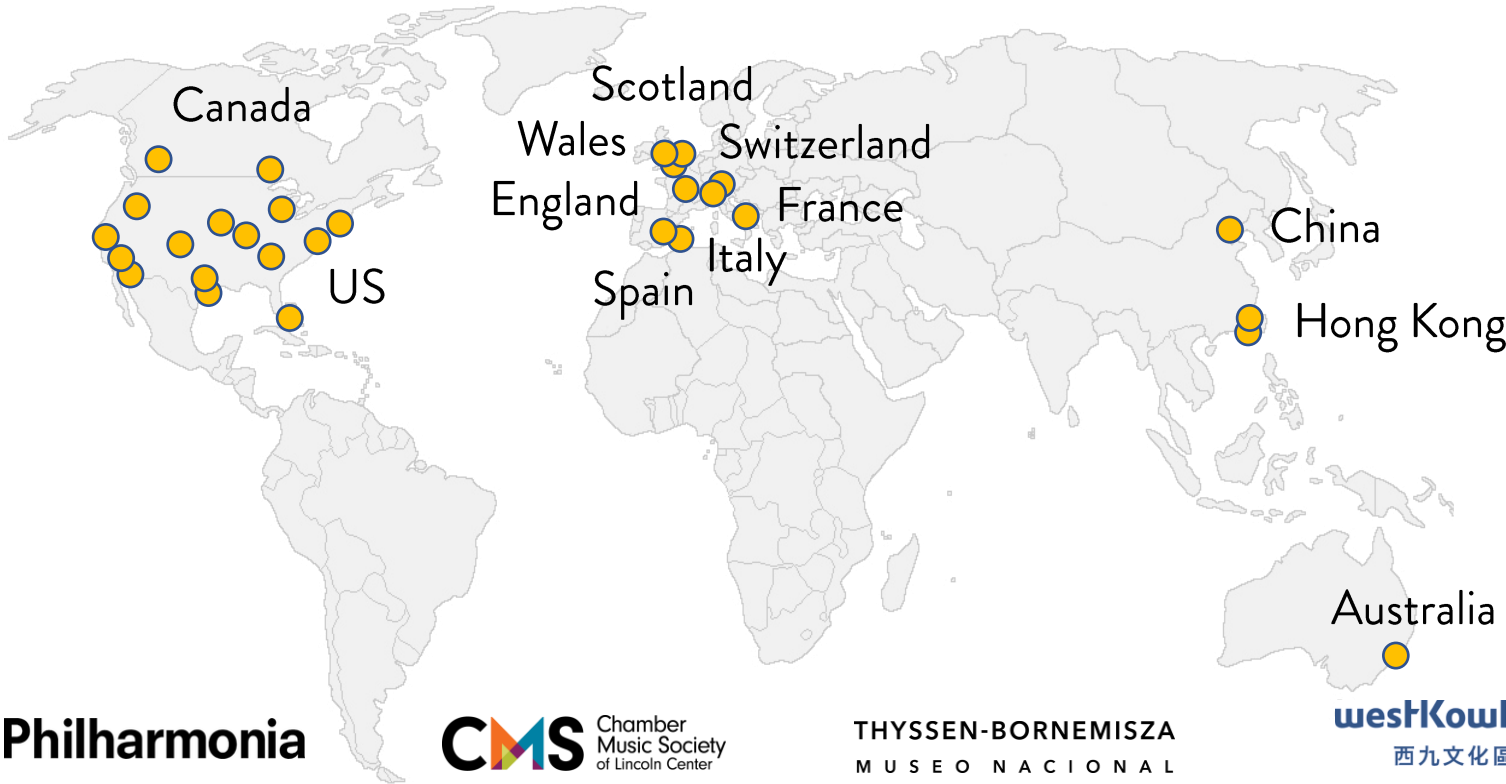
LENIKU  
BOTÍN  
CENTRO

Philharmonia



THYSSEN-BORNEMISZA  
MUSEO NACIONAL

westKowloon  
西九文化區



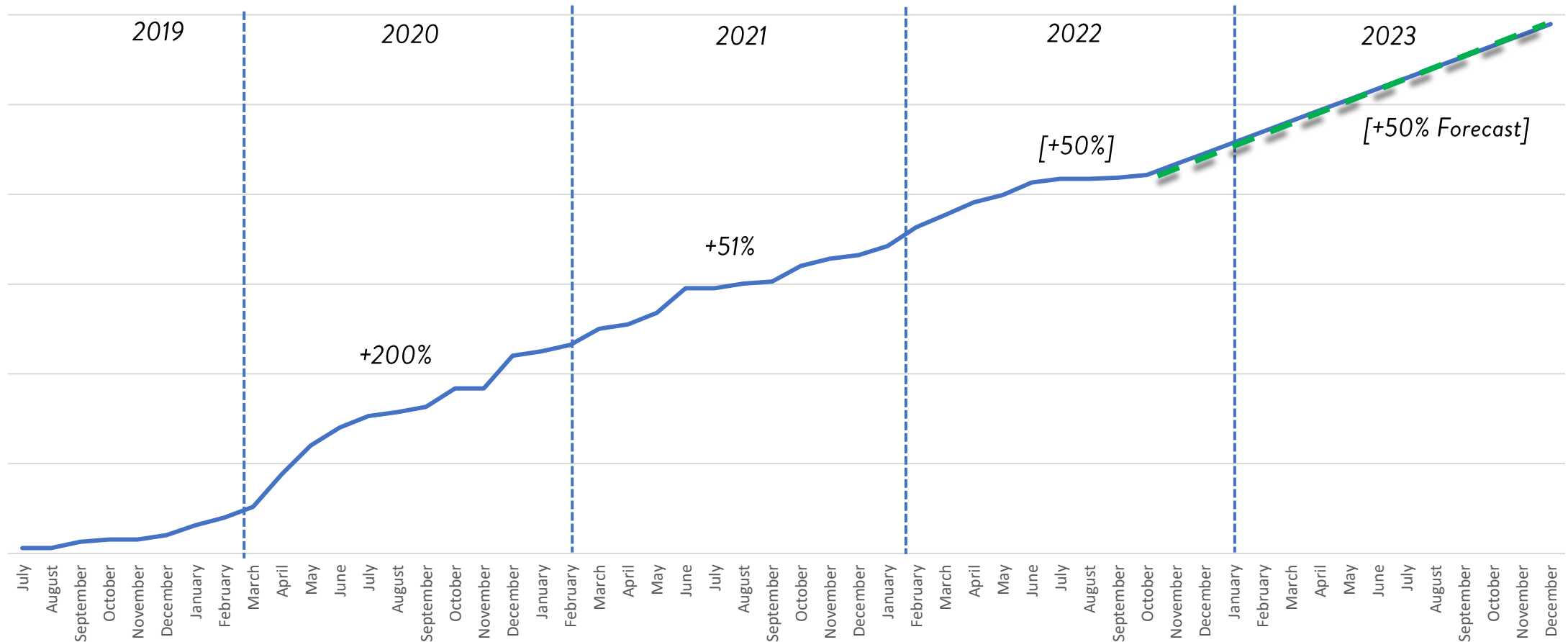
Melbourne  
Symphony  
Orchestra



SAN FRANCISCO  
OPERA



# Timing of Acquired New ABA Members



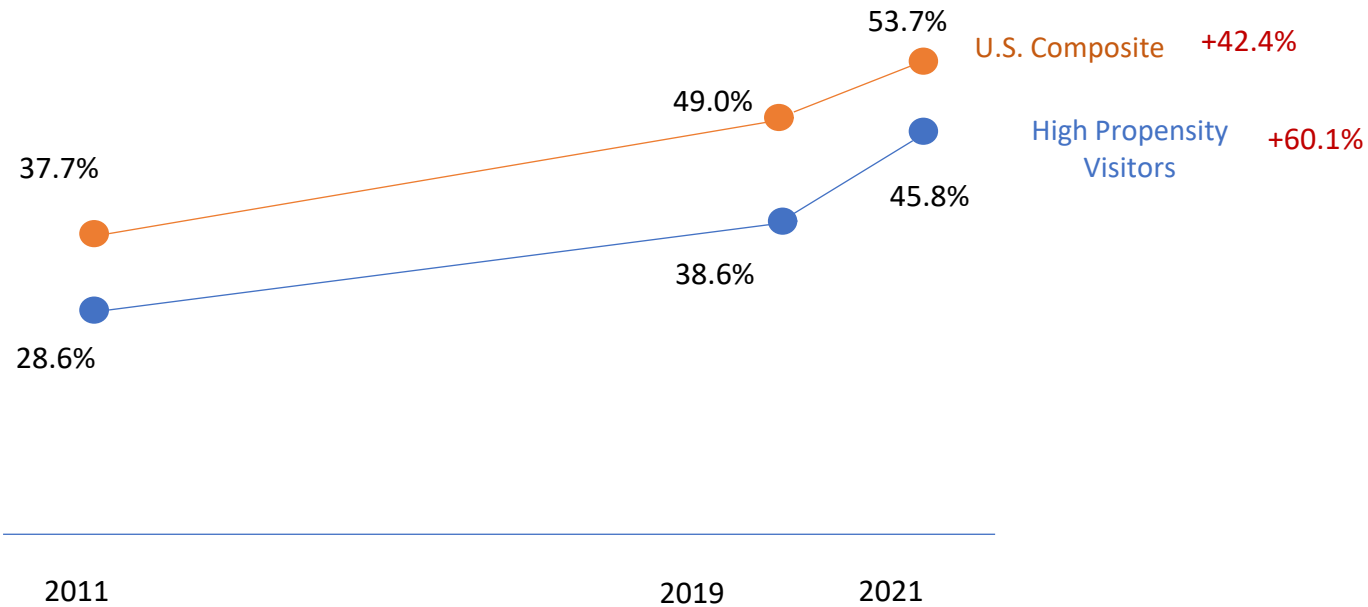
# The Best Ideas Regardless of Source



# Shifting Audience Behaviors

## Concerns about Audience Return

Preference to Stay Home on Weekend



Source: IMPACTS Experience.

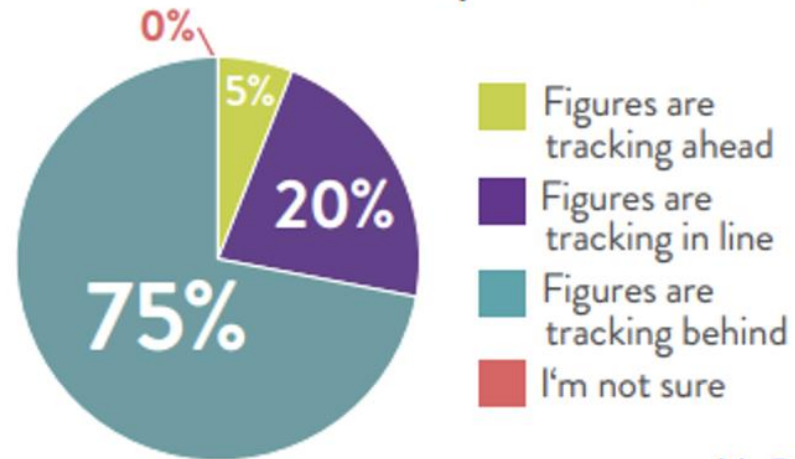
Source: ABA research.

# Ticket Sales Not Back Yet

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

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



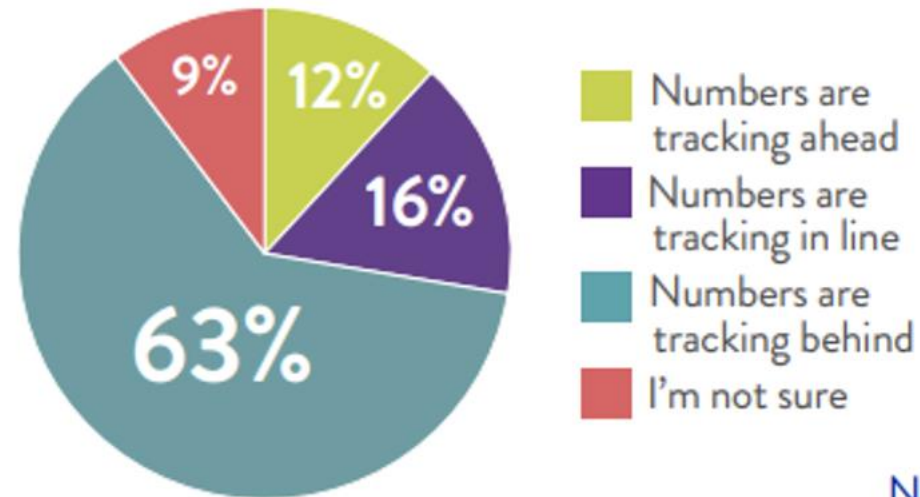
N=59

# Ticket Sales Not Back Yet

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

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



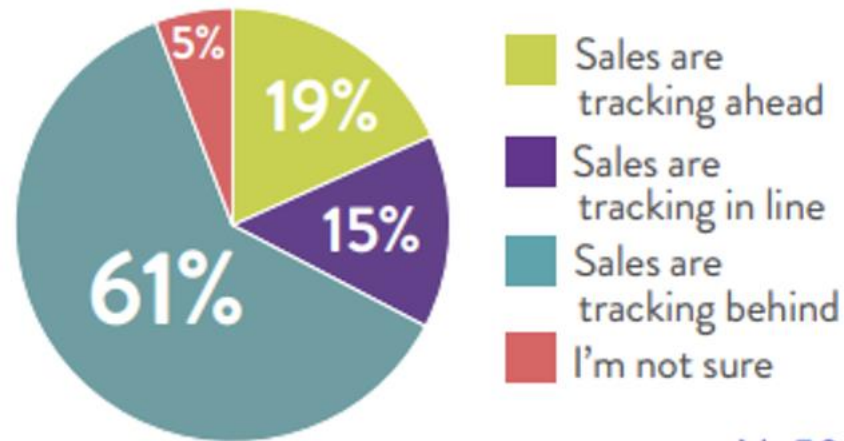
N=57

# Ticket Sales Not Back Yet

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

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



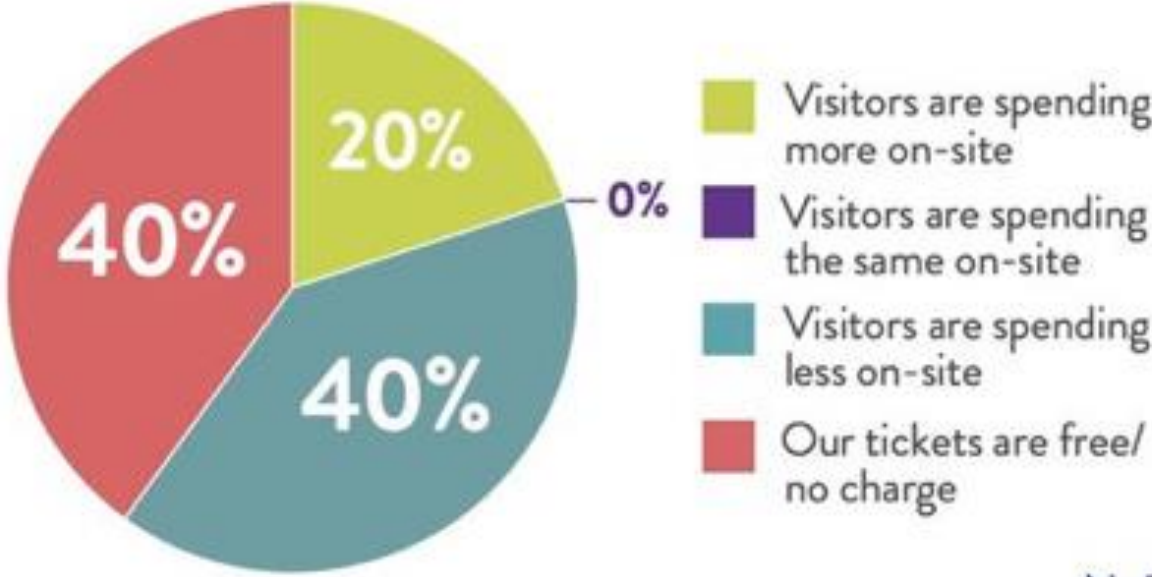
N=59



# Less Money Being Spent

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

On-site Spending Compared to Ticket Purchases

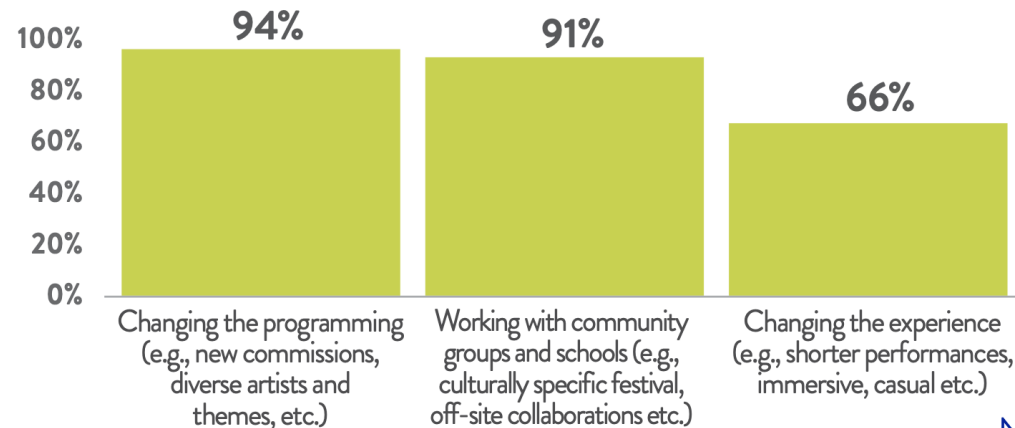


# Attempts at Leveraging Artistic Innovation

## ARTISTIC INNOVATIONS

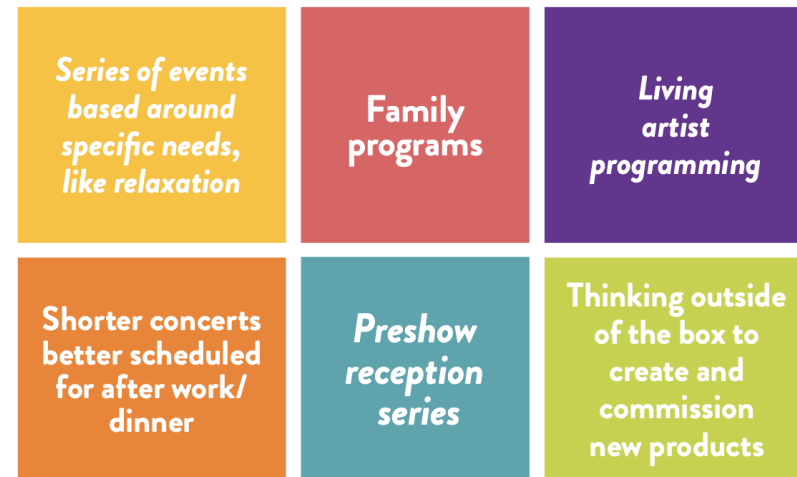
### Creative/Artistic Activities Undertaken to Increase Audience Diversification

When looking at which artistic activities have been the most successful at attracting diverse audiences, 44% said changing the programming; 34% said working with community groups and schools; and 13% said changing the experience.



N=32

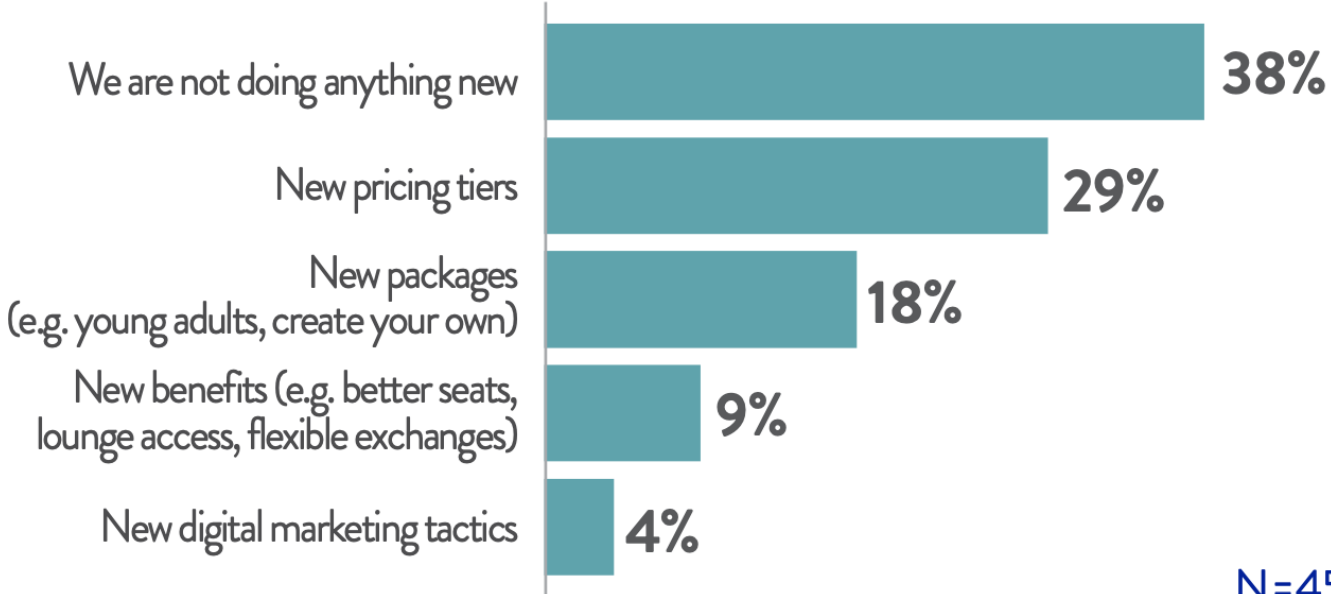
### Programs/Events Most Successful at Converting One-Time Audiences to Repeat Engagement



# Changes Attempted to Inflect Subscriptions

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

### Changes Made This Year to Subscription Packages and Offers

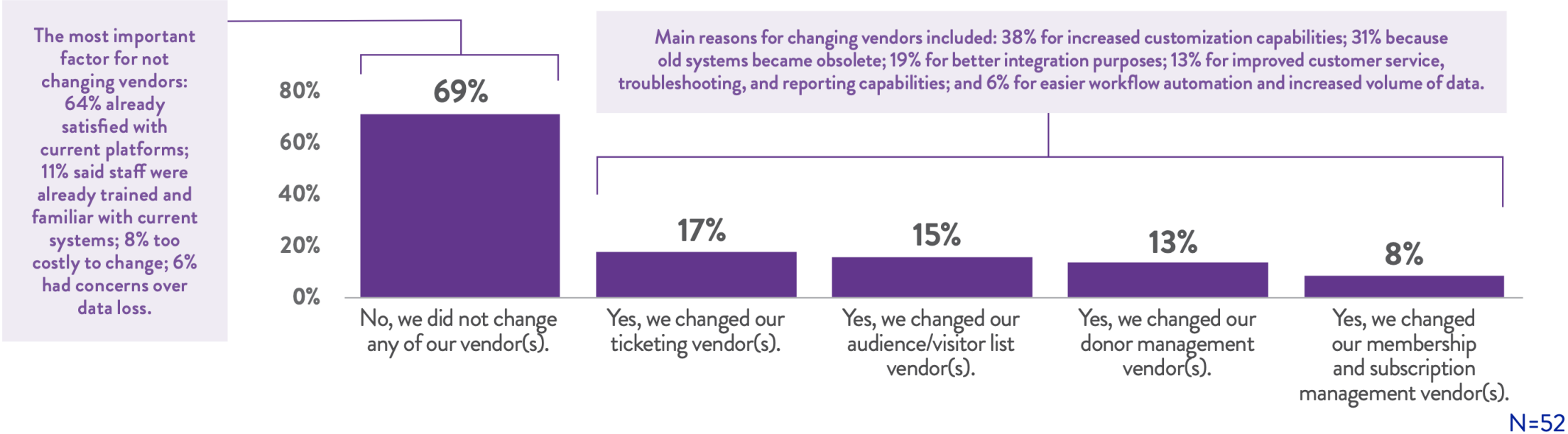


N=45

# Few if any Changes in CRM or Technology Platforms

## Majority Have Not Changed Vendors Due to Big Barriers to Switch

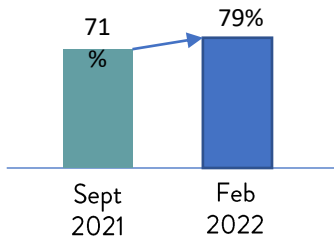
Technology Vendors Changed in the Last 5 Years, and Why



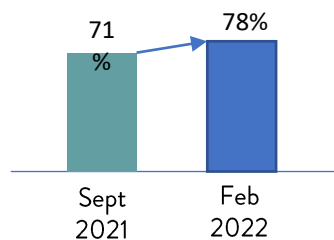
# For Many, Talent Pain is Severe Enough to Slow Recovery

## Difficulty Hiring

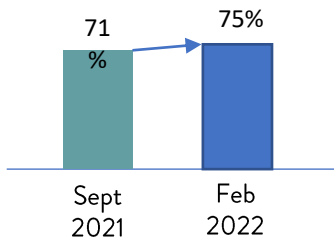
Difficulty Filling Senior Roles



Harder To Fill Than Pre-Pandemic



Difficulty Filling Mid-Level Roles

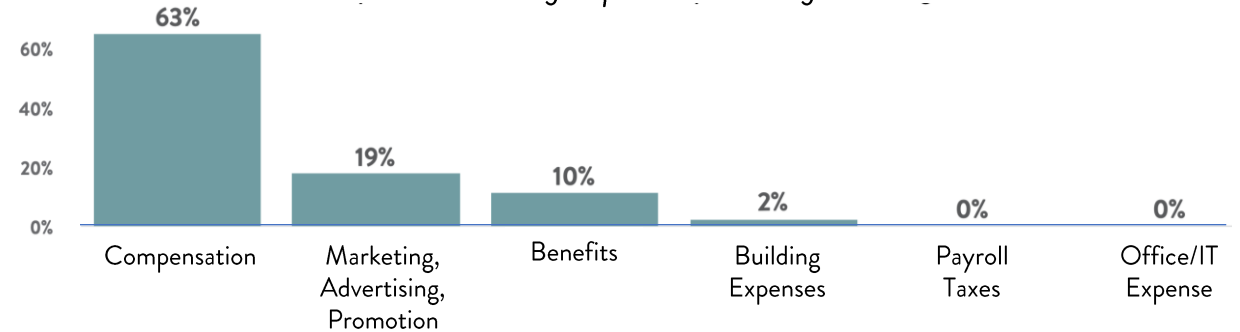


“There seems to be a whole section or level of suitable people missing in the arts sector right now.”

Survey Respondent

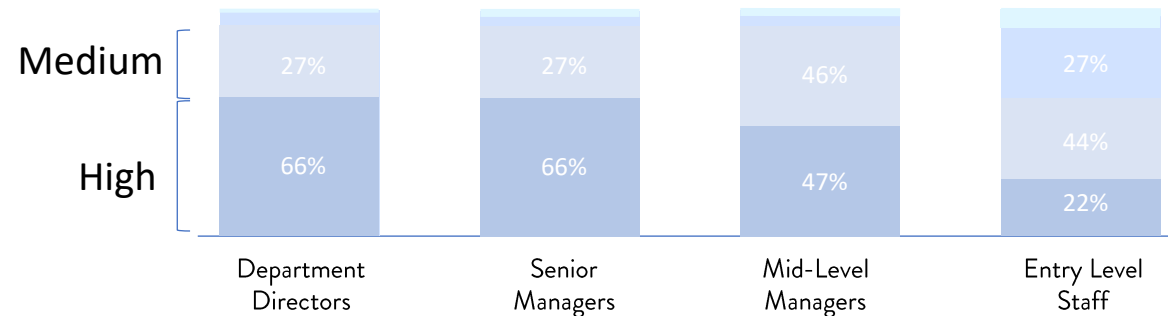
## Rising Payroll Costs

Biggest Expense Increase As Percentage of Next FY Budget



N = 48

## Level of Burnout

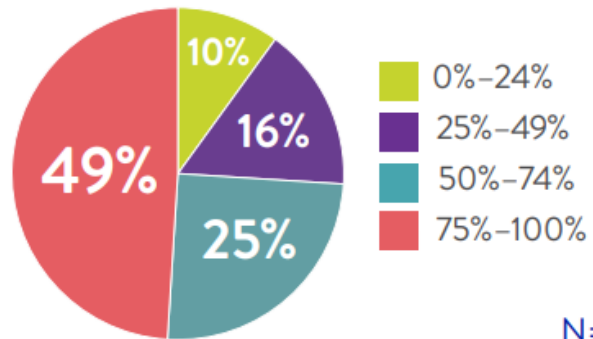


N = 73

# How Times Have Changed

## Almost All Staff Have Remote Work Days

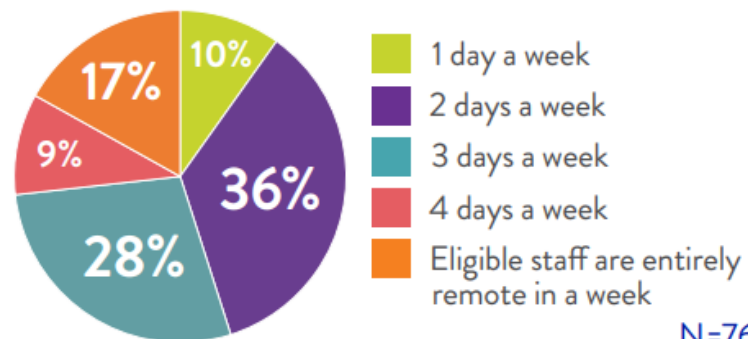
Percentage of Staff Currently Working from Home 1+ Day a Week



N=77

## A Range in the Number of Days Staff Can Work Remotely in a Week

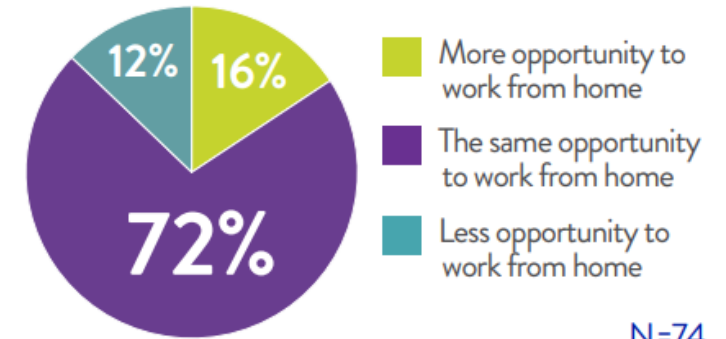
Average Number of Days Eligible Staff Can Work Remotely in a Week



N=76

## Majority Do Not Expect Changing Remote Work Policies

Changes to Work From Home Policies in the Near Future



N=74

# How ABA Can Help You?

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