CRStager
marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

Spring FOR MUSIC™

www.springformusic.org

The Festival of North American Orchestras

Carnegie Hall ▪ Spring 2011 - 2014

Sales & Audience Analysis

August 10, 2014

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

Final ticket sales for 2014 Spring For Music…

						Paid	Public/Group	Orchestra
				revenue	**tickets**	**capacity**	**purchase**	**purchase**
5-May	Monday	NEW YORK Philharmonic	$	42,582	1,860	69%	1,851	109
6-May	Tuesday	SEATTLE Symphony	$	55,751	2,484	92%	1,838	750
7-May	Wednesday	ROCHESTER Philharmonic	$	36,422	1,567	58%	928	734
8-May	Thursday	WINNIPEG Symphony	$	41,869	1,828	68%	1,108	817
9-May	Friday	CINCINNATI Symphony	$	41,080	1,795	67%	1,116	782
10-May	Saturday	PITTSBURGH Symphony	$	50,376	2,196	82%	1,837	464
		TOTAL	**$**	**268,080**	**11,730**	**73%**	**8,678**	**3,656**
		Average	*$*	*44,680*	*1,955*		*1,446*	*609*
		2013 Average	*$*	*42,561*	*1,829*	**68%**	*1,141*	*648*
		2012 Average	*$*	*37,807*	*1,568*	**58%**	*850*	*660*
		2011 Averate (7 concerts)	*$*	*35,113*	*1,463*	**54%**	*904*	*481*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

Spring For Music built its audience over four seasons:[1]

	2011	2012	2013	2014	avg 4 yr change
Public Sale	6,876	5,446	7,082	8,074	37%
Orchestra Sale	3,364	3,959	3,889	3,656	28%
TOTAL SOLD	**10,240**	**9,405**	**10,971**	**11,730**	33%
Capacity Utilization	54%	58%	68%	73%	
No. of concerts	7	6	6	6	

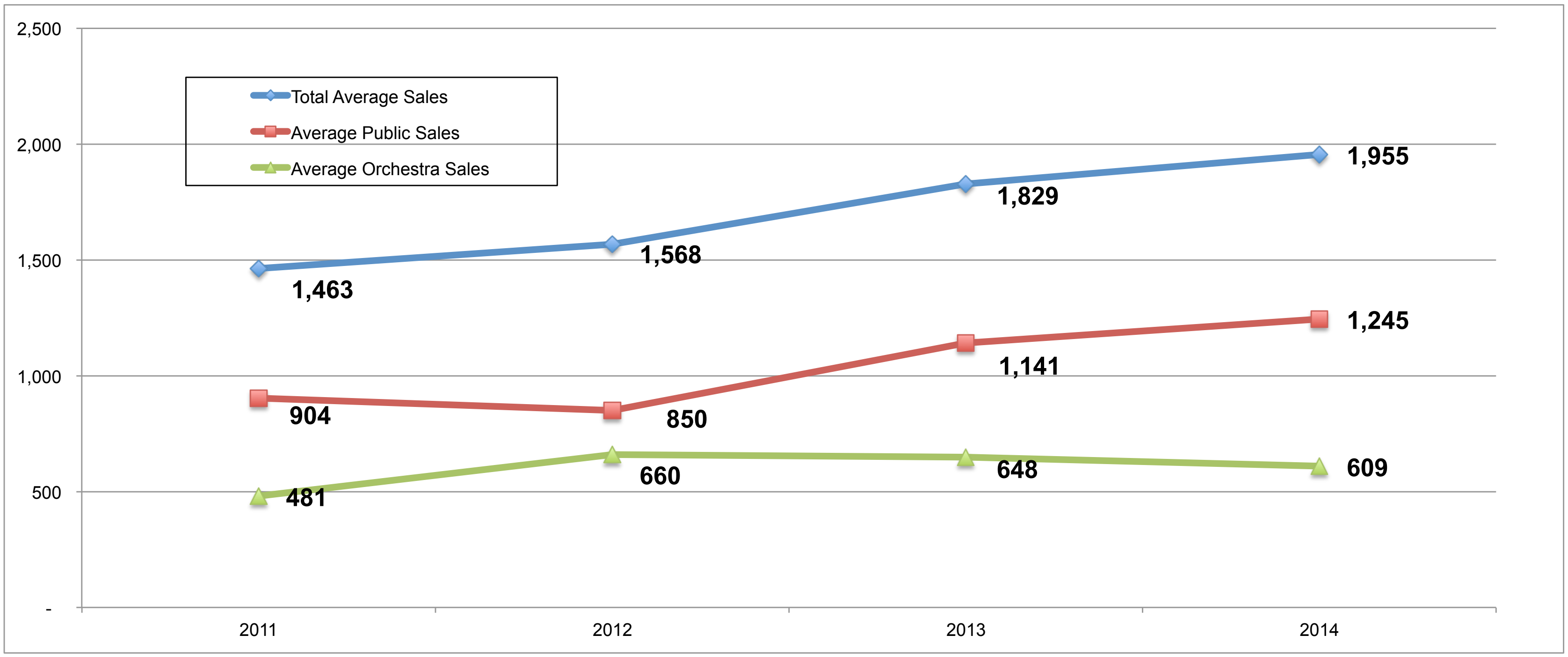
[1] *Public Sale includes Spring For Music purchased tickets and group sales.*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

TICKET SALES – the 4-year trend line – average per concert…



CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

4 Year Ticket Sales Analysis - CHRONOLOGICAL

n.b. Carnegie capcity = 2,689 - balcony = 837

n.b: SFM sales not shown - Public & Orchestra sales will not equal total sales

DATE	DAY	SEASON	ORCHESTRA	PROGRAM	REVENUE	TOTAL SALES	CAPACITY	PUBLIC SALES	ORCH SALES	CAPACITY w/o BALCONY
6-May	Friday	2011	ORPHEUS Chamber Orch	New Brandenburgs	$ 20,973	882	33%	548	266	48%
7-May	Saturday	2011	TOLEDO Symphony	Shostakovich Sym #6 / Previn EGBDF	$ 46,990	1,938	72%	537	1,320	open
10-May	Tuesday	2011	ALBANY Symphony	Spirituals Project / Appalachin Spring	$ 25,850	1,062	39%	672	316	57%
11-May	Wednesday	2011	DALLAS Symphony	Stucky 8/4/64	$ 29,910	1,232	46%	686	468	67%
12-May	Thursday	2011	OREGON Symphony	Music in Time of War	$ 32,965	1,358	51%	751	533	73%
13-May	Friday	2011	ST PAUL Chamber Orch	Maria Schneider / Haydn Sym #104	$ 30,950	1,297	48%	1,034	169	70%
14-May	Saturday	2011	MONTREAL Symphony	Surveying the Symphony / Beethoven Sym #5	$ 58,153	2,471	92%	2,101	292	open
7-May	Monday	2012	HOUSTON Symphony	Shostakovich Rayok / Sym #11	$ 27,865	1,184	44%	879	248	64%
8-May	Tuesday	2012	EDMONTON Symphony	Rival / Estacio / Gilland / Martinu Sym #1	$ 37,694	1,553	58%	606	900	84%
9-May	Wednesday	2012	NEW JERSEY Symphony	Varese Nocturnal / Weill Sym #2 / Busoni Piano Concerto w. Hamelin	*$ 44,557*	1,830	68%	828	947	open
10-May	Thursday	2012	ALABAMA Symphony	Dorman / Lansky / Beethoven Sym #7	$ 41,552	1,713	64%	967	695	92%
11-May	Friday	2012	MILWAUKEE Symphony	Messiaen Off Oubliees / Debussy La Mer / Chen Iris Devolee	$ 35,100	1,465	54%	805	600	79%
12-May	Saturday	2012	NASHVILLE Symphony	Ives Universe Sym / Reiley Electric Vln Con w. Silverman / Grangier Warriors	$ 40,071	1,660	62%	1,016	569	90%
6-May	Monday	2013	BALTIMORE Symphony	Adams Shaker Loops / Higdon Time for 3 Concerto / Prokofiev Sym #4	$ 27,888	1,213	45%	986	193	65%
7-May	Tuesday	2013	ALBANY Symphony	Harbison Gatsby Suite / Gershwin Second Rhapsody w. Cole / Gould Sym #3	$ 28,265	1,211	45%	672	500	65%
8-May	Wednesday	2013	BUFFALO Philharmonic	Kanchelli Morning Prayers / Gliere Sym #3	$ 55,705	2,361	88%	778	1,547	open
9-May	Thursday	2013	DETROIT Symphony - 1	Rachmaninoff Caprice & Isle of Dead / Weill 7 Deadly Sins w. Storm Large / Ravel La Valse	$ 52,434	2,253	84%	1,472	734	open
10-May	Friday	2013	DETROIT Symphony - 2	Ives Four Symphonies	$ 49,456	2,124	79%	1,419	665	open
11-May	Saturday	2013	NATIONAL Symphony	Slava Tribute: Shchedrin / Schnittke / Shostakovich Sym #5	$ 41,619	1,809	67%	1,517	250	98%
5-May	Monday	2014	NEW YORK Philharmonic	Rouse Requiem	$ 42,582	1,860	69%	1,651	109	open
6-May	Tuesday	2014	SEATTLE Symphony	JL Adams Become Ocean / Varese Deserts / Debussy La Mer	$ 55,751	2,484	92%	1,630	750	open
7-May	Wednesday	2014	ROCHESTER Philharmonic	Hanson Merry Mount	$ 36,422	1,567	58%	738	734	85%
8-May	Thursday	2014	WINNIPEG Symphony	Schaffer Sym #1 / Charke Inuit Throat Games w. Tagaq / Ho Shaman Percussion Con w. Glennie	$ 41,869	1,828	68%	914	817	open
9-May	Friday	2014	CINCINNATI Symphony	Adams Harmonium / Dett Ordering of Moses	$ 41,080	1,795	67%	910	782	97%
10-May	Saturday	2014	PITTSBURGH Symphony	Bruckner Ave Maria / Poulenc Carmelites / MacMillan Apocolypse / Mozart Requiem & Death	$ 50,376	2,196	82%	1,627	464	open
				average =	***$ 39,843***	***1,694***	***63%***	***1,030***	***595***	

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

SUMMARY OF PUBLIC TICKET SALES [2]

DATE	DAY	SEASON	ORCHESTRA	PROGRAM	PUBLIC SALES
14-May	Saturday	**2011**	MONTREAL Symphony	Surveying the Symphony / Beethoven Sym #5	**2,101**
5-May	Monday	**2014**	NEW YORK Philharmonic	Rouse Requiem	**1,651**
6-May	Tuesday	**2014**	SEATTLE Symphony	JL Adams Become Ocean / Varese Deserts / Debussy La Mer	**1,630**
10-May	Saturday	**2014**	PITTSBURGH Symphony	Bruckner Ave Maria / Poulenc Carmelites / MacMillan Apocolypse / Mozart Requiem & Death	**1,627**
11-May	Saturday	**2013**	NATIONAL Symphony	Slava Tribute: Shchedrin / Schnittke / Shostakovich Sym #5	**1,517**
9-May	Thursday	**2013**	DETROIT Symphony - 1	Rachmaninoff Caprice & Isle of Dead / Weill 7 Deadly Sins w. Storm Large / Ravel La Valse	**1,472**
10-May	Friday	**2013**	DETROIT Symphony - 2	Ives Four Symphonies	**1,419**
13-May	Friday	**2011**	ST PAUL Chamber Orch	Maria Schneider / Haydn Sym #104	**1,034**
12-May	Saturday	**2012**	NASHVILLE Symphony	Ives Universe Sym / Reiley Electric Vln Con w. Silverman / Grangier Warriors	**1,016**
6-May	Monday	**2013**	BALTIMORE Symphony	Adams Shaker Loops / Higdon Time for 3 Concerto / Prokofiev Sym #4	**986**
10-May	Thursday	**2012**	ALABAMA Symphony	Dorman / Lansky / Beethoven Sym #7	**967**
8-May	Thursday	**2014**	WINNIPEG Symphony	Schaffer Sym #1 / Charke Inuit Throat Games w. Tagaq / Ho Shaman Percussion Con w. Glennie	**914**
9-May	Friday	**2014**	CINCINNATI Symphony	Adams Harmonium / Dett Ordering of Moses	**910**
7-May	Monday	**2012**	HOUSTON Symphony	Shostakovich Rayok / Sym #11	**879**
9-May	Wednesday	**2012**	NEW JERSEY Symphony	Varese Nocturnal / Weill Sym #2 / Busoni Piano Concerto w. Hamelin	**828**
11-May	Friday	**2012**	MILWAUKEE Symphony	Messiaen Off Oubliees / Debussy La Mer / Chen Iris Devolee	**805**
8-May	Wednesday	**2013**	BUFFALO Philharmonic	Kanchelli Morning Prayers / Gliere Sym #3	**778**
12-May	Thursday	**2011**	OREGON Symphony	Music in Time of War	**751**
7-May	Wednesday	**2014**	ROCHESTER Philharmonic	Hanson Merry Mount	**738**
11-May	Wednesday	**2011**	DALLAS Symphony	Stucky 8/4/64	**686**
10-May	Tuesday	**2011**	ALBANY Symphony	Spirituals Project / Appalachin Spring	**672**
7-May	Tuesday	**2013**	ALBANY Symphony	Harbison Gatsby Suite / Gershwin Second Rhapsody w. Cole / Gould Sym #3	**672**
8-May	Tuesday	**2012**	EDMONTON Symphony	Rival / Estacio / Gilland / Martinu Sym #1	**606**
6-May	Friday	**2011**	ORPHEUS Chamber Orch	New Brandenburgs	**548**
7-May	Saturday	**2011**	TOLEDO Symphony	Shostakovich Sym #6 / Previn EGBDF	**537**
				AVERAGE	***1,030***

[2] *In this chart, Spring For Music purchased tickets are NOT included.*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

SUMMARY OF ORCHESTRA TICKET SALES

DATE	DAY	SEASON	ORCHESTRA	PROGRAM	ORCH SALES
8-May	Wednesday	**2013**	BUFFALO Philharmonic	Kanchelli Morning Prayers / Gliere Sym #3	**1,547**
7-May	Saturday	**2011**	TOLEDO Symphony	Shostakovich Sym #6 / Previn EGBDF	**1,320**
9-May	Wednesday	**2012**	NEW JERSEY Symphony	Varese Nocturnal / Weill Sym #2 / Busoni Piano Concerto w. Hamelin	**947**
8-May	Tuesday	**2012**	EDMONTON Symphony	Rival / Estacio / Gilland / Martinu Sym #1	**900**
8-May	Thursday	**2014**	WINNIPEG Symphony	Schaffer Sym #1 / Charke Inuit Throat Games w. Tagaq / Ho Shaman Percussion Con w. Glennie	**817**
9-May	Friday	**2014**	CINCINNATI Symphony	Adams Harmonium / Dett Ordering of Moses	**782**
6-May	Tuesday	**2014**	SEATTLE Symphony	JL Adams Become Ocean / Varese Deserts / Debussy La Mer	**750**
9-May	Thursday	**2013**	DETROIT Symphony - 1	Rachmaninoff Caprice & Isle of Dead / Weill 7 Deadly Sins w. Storm Large / Ravel La Valse	**734**
7-May	Wednesday	**2014**	ROCHESTER Philharmonic	Hanson Merry Mount	**734**
10-May	Thursday	**2012**	ALABAMA Symphony	Dorman / Lansky / Beethoven Sym #7	**695**
10-May	Friday	**2013**	DETROIT Symphony - 2	Ives Four Symphonies	**665**
11-May	Friday	**2012**	MILWAUKEE Symphony	Messiaen Off Oubliees / Debussy La Mer / Chen Iris Devolee	**600**
12-May	Saturday	**2012**	NASHVILLE Symphony	Ives Universe Sym / Reiley Electric Vln Con w. Silverman / Grangier Warriors	**569**
12-May	Thursday	**2011**	OREGON Symphony	Music in Time of War	**533**
7-May	Tuesday	**2013**	ALBANY Symphony	Harbison Gatsby Suite / Gershwin Second Rhapsody w. Cole / Gould Sym #3	**500**
11-May	Wednesday	**2011**	DALLAS Symphony	Stucky 8/4/64	**468**
10-May	Saturday	**2014**	PITTSBURGH Symphony	Bruckner Ave Maria / Poulenc Carmelites / MacMillan Apocolypse / Mozart Requiem & Death	**464**
10-May	Tuesday	**2011**	ALBANY Symphony	Spirituals Project / Appalachin Spring	**316**
14-May	Saturday	**2011**	MONTREAL Symphony	Surveying the Symphony / Beethoven Sym #5	**292**
6-May	Friday	**2011**	ORPHEUS Chamber Orch	New Brandenburgs	**266**
11-May	Saturday	**2013**	NATIONAL Symphony	Slava Tribute: Shchedrin / Schnittke / Shostakovich Sym #5	**250**
7-May	Monday	**2012**	HOUSTON Symphony	Shostakovich Rayok / Sym #11	**248**
6-May	Monday	**2013**	BALTIMORE Symphony	Adams Shaker Loops / Higdon Time for 3 Concerto / Prokofiev Sym #4	**193**
13-May	Friday	**2011**	ST PAUL Chamber Orch	Maria Schneider / Haydn Sym #104	**169**
5-May	Monday	**2014**	NEW YORK Philharmonic	Rouse Requiem	**109**
				AVERAGE	***595***

CRStager **marketing & audience development**

250 West 57th Street – Suite 901 New York, New York 10107

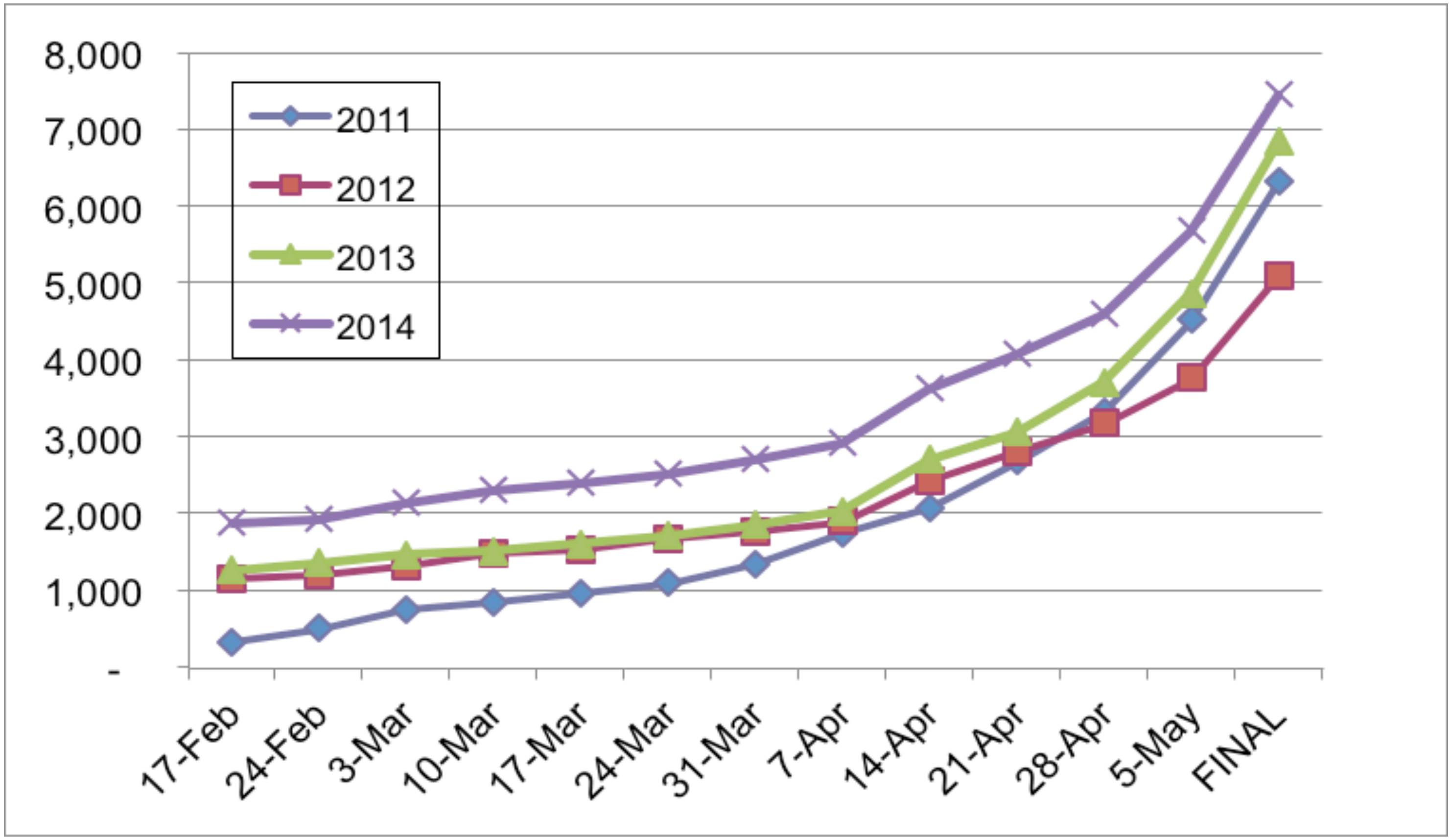
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

WHAT SALES PATTERNS EMERGED?

2014 <u>average public sales per concert</u> were consistently ahead of all previous years throughout the course of the cycle…



CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

PATRON ANALYSIS

1) *Profile and demographics of ticket buyers, based on Spring For Music's own patron analysis, is indicated in **BLACK TYPE** on the following pages.*

2) *Psychographic data, based on the Spring For Music ticket buyer survey administered online following the festival in May 2014, is indicated in **RED TYPE** on the following pages[3].*

3) *For the first time, Carnegie Hall also analyzed Spring For Music, and their data points are indicated in **BLUE TYPE** on the following pages.*

[3] *An on-line audience survey was undertaken immediately following the Festival each year. By nature it was limited to only those patrons providing an e-mail addresses, and the responses based on only those who chose to respond. Obviously "non-promotable" walk-up buyers could not be surveyed.*

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

DID SFM CREATE A RENEWABLE AUDIENCE?

The majority of the audience attended SFM for the first time each year. While small, repeat attendance grew each year.

16.4% of "In-market" 2014 HH also previously attended Spring For Music

- *Up from 13.7% in 2013 vs. 9.5% attended in both 2011 and 2012*
- *236 of the 1,350 promotable consumer "in-market" HH*
- *Additionally, 36 returning households were "out of market" (445 HH)*
- *14% "in-market" HH purchased tickets to 2+ SFM events in 2014 – very close to 2013*
- *Likely exclude, non-trackable / non-promotable "walk up" sales – 27% of public sales*
- *While the volume is small, the number of returning patrons has grown each year since 2012*

- *Symphony audiences average 75-80% subscriber renewal each year*
- *On-line SFM audience surveys suggested high repeat traffic:*

2011 survey – 83% of respondents reported they would return in 2012
2012 survey – 69% of respondents reported they would return in 2013
2013 survey – 78% of respondents reported they would return in 2014

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

HOW DO SFM SALES COMPARE TO OTHER NYC OFFERINGS?

Average single ticket sales in May 2014 for New York ensembles, per performance[4], follow. For the first time, Spring For Music led the pack. Each comparative concert has a subscriber base, though not reported here. (We could consider Orchestra sales as a subscriber base for SFM)…

SPRING FOR MUSIC (public sale average) = 1,446

vs.

Bavarian Radio Symphony / Jansons (1) = 1,389

Philadelphia Orchestra / Seguin = 1,258

MET Orchestra / Levine = 1,174

Bavarian Radio Symphony / Jansons (2) = 745

New York Philharmonic (May single tix average) = 729

[4] *Bavarian Radio Symphony, Philadelphia and MET Orchestras at Carnegie Hall, May 2014.*

CRStager **marketing & audience development**

250 West 57th Street – Suite 901 New York, New York 10107

917.940.1748 CRStager@CRStager.com **CRStager.com**

WHAT WAS THE 2014 MARKETING TIMELINE?

SFM 6 & 4-packs sold from end of 2013 festival to on-sale date of August 26

- *From on-sale date through Festival, upselling of memberships through Carnegie Phone Charge*
- ***210 6-packs, 68 4-pack sold for 2014** – sales of series packages grew each year*
- *133 6-packs, 57 4-packs sold for 2013 (includes SFM purchase) vs. 83 6-packs & 40 4-packs in 2012*

SFM single tickets included in Carnegie Hall's on-sale launch

- *Postcard mailed in August 2013 to all past SFM tickets buyers announcing on-sale*
- *Second postcard mailing to past buyers in February 2014*
- *20% of all public tickets sold by January 31 via inclusion in Carnegie's early efforts vs. 17% in 2012 & 2013, but with greater volume throughout sales cycle*

DIRECT MAIL: Brochure mailing in April – two waves

- *56,000 trades and demographic names, modeled on past buyers – mailed April 1*
- *Model built on such variables as education, arts interest, age, neighborhood, direct mail history*
- *Included all past SFM buyers and NYC patron accounts from 2014 orchestras*
- *Second mailing to 14,000 of the top modeled demographic names and past SFM buyers – April 15*
- *Mail accounted for 38% of promotable HH vs. 30% in 2013 vs. 37% in 2012 vs. 28% in 2011*
- *Mailing effort nearly broke even for the first time: cost per piece =$0.42 vs. return per piece = $0.40*
- *Profitability challenged by low ticket price*
- *Revenue was up 25% over 2013 driven by gains in response & penetration rates*
- *Generated average $57 per order (vs. $55 in 2013 vs. $58 in 2012); 2.6 tickets per order*
- *Mail impact on walk-up sales always unknown = 29% of public sales volume*

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

ADVERTISING: final two week push

- *New York Times advertising discontinued in 2013 and 2014*
- *Time Out New York – two ads with promotional support, as in 2013*
- *Ads and on-line support in New Music Box, Sequenza 21, The Glass, New Music Box, Feast of Music, The Glass*
- *"Week out / Week of" radio schedules on WCBS radio – voiced by Dick Cavett*

INTERNET:

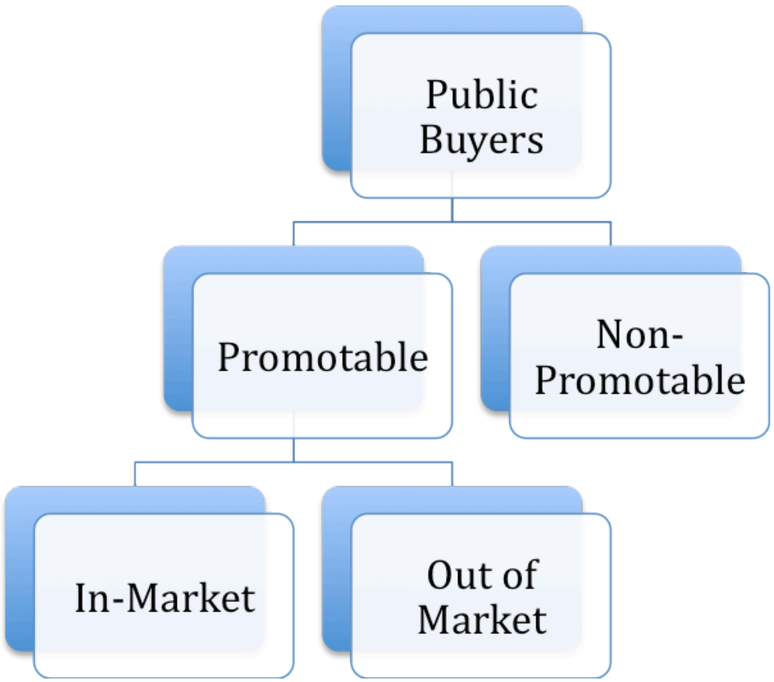
- *Coordinated through Carnegie Hall in 2013 – included web retargeting, Google Ad words – effort far exceeded return in 2013*
- *Activity eliminated in 2014 – portion of resources re-directed to greater presence in Time Out NY, WCBS, music publications*
- *E-blasts from Carnegie Hall, New York Philharmonic & SFM*

Identity building – "SFM specific" – 3-sheets / doors / program inserts – all communicating the programs and critical praise of the four-year festival

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

WHO WAS THE SPRING FOR AUDIENCE?

The base of ticket buyers from the public sale can be broken down…



CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

First, within the public buyers there are two groups…

Promotable Households: ***With a name and address attached to the account, can be cultivated***

- *1,795 accounts = 68% of all public sale vs. 61% in 2011*
  - *vs. 1,857 accounts in 2013*
  - *vs. 1,231 accounts in 2012*
  - *vs. 1,521 accounts in 2011*
- *2.6 tickets per household – identical to 2013*
  - *vs. 2.5 tickets per household in 2012*
  - *vs. 2.3 in 2011*
- *1.1 concerts per order – identical to 2013*
  - *vs. 1.2 concerts per order in 2012 and 2011*

Non-Promotable Households: ***Walk-up sales with no name or address; only transaction data captured***

- *1,120 accounts with 1.9 tickets per household*
  - *vs. 1,084 accounts with 2.0 tickets per household in 2013*
  - *vs. 902 accounts in 2012*
  - *vs. 1,124 in 2011*
  - *1.9 tickets per household in 2012 and 2011*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

WHERE ARE THE PROMOTABLE HOUSEHOLDS?

The public sale ***Promotable Households*** *can be further divided…*

"In-Market" Households: *Metro tri-state area: five boroughs, Westchester, Putnam, Long Island, east New Jersey, and Fairfield County, Connecticut*

- *1,350 households*
    - *vs. 1,291 in 2013 vs. 864 in 2012 vs. 1,160 in 2011*
- *2.5 tickets per household*
    - *vs. 2.5 in 2013 vs. 2.4 in 2012 vs. 2.3 in 2011*
- *14% returned to see more than one concert, though promotable accounts who "walk-up" for additional concerts is unknown*

Out of Market Households: *National; fall outside the regions above*

- *445 accounts*
    - *vs. 447 in 2013 vs. 367 accounts in 2012 vs. 361 in 2011*
- *2.7 tickets per household*
    - *vs. 2.7 in 2013 vs. 2.8 in 2012 vs. 2.4 in 2011*

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

WHERE DO PATRONS LIVE?

There are 1,350 accounts classified as "in-market" representing 46% of total accounts…

78% of the promotable households are in these four counties…

- *New York, NY = 46% (vs. 44.4% in 2013 vs. 44.4% in 2012 vs. 36.5% in 2011)*
- *Kings County = 18.3% (vs. 16% in 2013 vs. 13.4% in 2012 vs. 12.4% in 2011)*
- *Queens County = 8.7% (vs.11.2% in 2013 vs. 12.4% in 2012 vs. 9.8% in 2011)*
- *Westchester County =5.2% (vs. 4.4% in 2013 vs. 5.2% in 2012 vs. 6% in 2011)*

28% of the promotable households reside in the top 10 zip codes – note the growth in previously low responding zips, particularly Brooklyn…

- *10025 (Upper West Side) = 5.2% vs. 4.1% in 2013 vs. 4.2% in 2012 vs. 3.5% in 2011*
- *10023 (Upper West Side) = 3.9% vs. 4.5% in 2013 vs. 4.7% in 2012 vs. 3.6% in 2011*
- *10019 (Carnegie Hall) = 2.7% vs. 1.8% in 2013 vs. 1.7% in 201 vs. 1.9% in 2011*
- *10024 (Upper West Side) = 2.7% vs. 2.8% in 2013 vs. 3.0% in 2012 vs. 2.8% in 2011*
- *11201 (Brooklyn Hts/Cobble Hill) = 2.4% - far less significant in 2011, 2012 and 2013*
- *11215 (Park Slope) =2.4% vs. 2.3% in 2013 vs. 2.1% in 2012 (no responses in 2011)*
- *10011 (Chelsea/Greenwich Vil.) =2.2% vs. 2.5% in 2013 vs. 2.3% in 2012 (no responses in 2011)*
- *10027 (Morningside Heights) – 2.2% - far less significant in 2011, 2012 and 2013*
- *10128 (Upper East Side) = 2.% vs. 2.8% in 2013 vs. 2.1% in 2012 vs. 1.3% in 2011*
- *10028 (Upper East Side) = 2% vs. 2.2% - far less significant in 2011, 2012 and 2013*

CRStager marketing & audience development

250 West 57th Street – Suite 901 New York, New York 10107

917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

WHAT DO TICKET BUYERS LOOK LIKE?

The profile of promotable "in-market" tickets buyers is near identical to 2011…

- ***AGE: 45% are under age 55; 27% aged 25 – 44 – younger than 2013 & 2012;*** *very similar reporting in audience survey*
- ***INCOME: 22% earn $150K+; 24% earn less than $50K; 15% earn less than $35K;*** *14% of survey respondents report earning less that $50K*
- ***EDUCATION: 80% have a college and / or graduate degree*** *vs. 40% of the "in-market" population; 91% of survey respondents declare holding a college and / or graduate degree*
- ***CHILDREN: 18% have children in home****; identical to 2013, higher than in 2012 and 2011; 90% of survey respondents report no children under 18 living at home*
- ***DIRECT MARKETING: 89% are frequent direct marketing respondents*** *vs. 64% of the "in-market" population*
- ***MUSIC EDUCATION: 62% studied / performed music in their student years*** *vs. 55% in 2013, as reported in the on-line audience survey*
- ***RESIDENCY: 16% native of NY, 9% transplants, 46% out of market*** *per online survey*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

WHAT FACTORS ATTRACT TICKET BUYERS TO SFM?

Respondents to the on-online audience survey report as "Very Important" – Programming is still the primary driver of interest, more so than price and venue. Note that over three surveys, Programming grows in importance, as both ticket price and the allure of Carnegie Hall diminish…

1. ***Programming / Repertoire = 73.8%***
   - *vs. 70.4% in 2013 vs. 65.9% in 2012 – more important each year*

2. ***$25 Ticket Price = 53.5%***
   - *vs. 59.3% in 2013 vs. 60.9% in 2012 – less important each year*

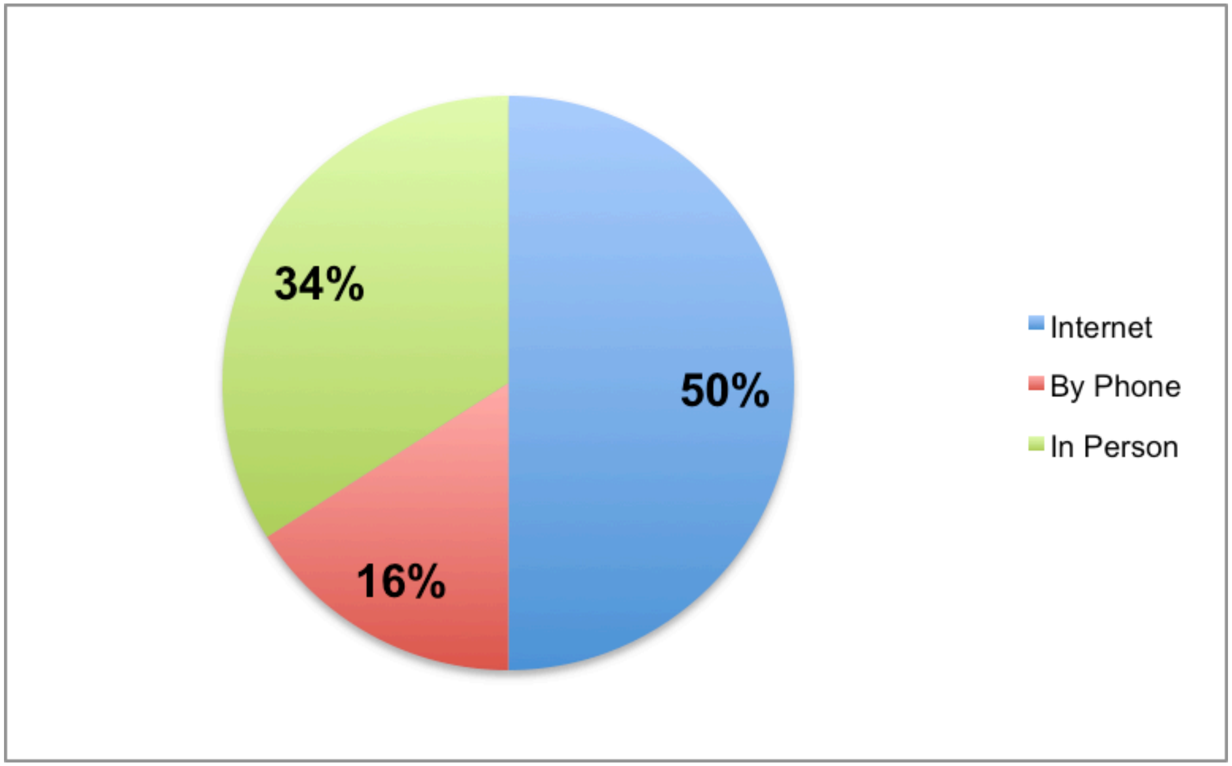
3. ***Attending a concert at Carnegie Hall = 53.7%***
   - *vs. 58.5% in 2013 vs. 61.2% in 2012 – less important each year*

4. ***Participating Orchestras = 55.8%***
   - *vs. 52.6% in 2013 vs. 53.0% in 2012 – more important in 2014*

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

HOW DID PATRONS BUY THEIR TICKETS?

Sales through all three purchase channels were nearly identical across all four years. Even as the volume of public ticket sales increases, sales across all channels proportionately remain the same year to year[5] …



[5] Among those responding to the on-line audience survey, 80% report purchasing on-line.

DID SPRING FOR MUSIC ATTRACT NEW TICKET BUYERS?

Of the 1,738 promotable public purchase households….

46% were new to Carnegie Hall

(vs. 51% in 2013 & 2012 vs. 54% in 2011)

30% reported SFM as their first Carnegie Hall concert in the on-line survey

- *39% "in-market" – 7% "out of market"*

- *24.7% of the promotable households recently attended other Carnegie Hall concerts; primarily orchestral vs. 27.4% in 2013 vs. 32.3% in 2012*

Spring For Music proved to be a point-of-entry to creative programming and to Carnegie Hall.

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

CARNEGIE HALL PARTICIPATION

3,906 accounts over the four years were new to Carnegie Hall
Those accounts subsequently purchased 1,502 other Carnegie Hall tickets = $82,000[6]

Between January 31, 2013 & May 11, 2014 –
promotable in-market SFM buyers
new or already on Carnegie Hall's database purchased:
2,181 Carnegie Hall single tickets = $127,000
&
1,896 Carnegie Hall subscription tickets = $141,000

Carnegie Hall reports 15% to 20% of SFM households also purchased Carnegie Hall Presents tickets in that same or a subsequent season; approximately 50% of those households were new to Carnegie through SFM

In 2014, 94 households (4.5%) were also Carnegie Hall Friends, while 11 households were Carnegie Hall Patrons – rates similar to 2013

[6] *Some buyer data for subsequent Carnegie Hall purchases is available.*

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

DIRECT MAIL RESPONSE

86% of all direct mail response came from five lists. Experian lifestyle response continued to build. The strong response from the participating New York Philharmonic is not a surprise. Carnegie Hall delivered ever fewer responses as the patron profile sharpened to less resemble traditional Carnegie audiences…

- *Experian (purchased – 151 responses vs. 129 in 2013 vs. 118 in 2012)*
- *New York Philharmonic (trade – 91 responses vs. 26 in 2013 vs. 43 in 2012)*
- *Carnegie Hall (trade – 22 responses vs. 36 in 2013 vs. 78 in 2012)*
- *Lincoln Center (trade – 19 responses vs. 41 in 2013 vs. 22 in 2012)*
- *Miller Theatre (trade – 15 responses)*

Experian demographic = 151 orders vs. 188 orders from all trades

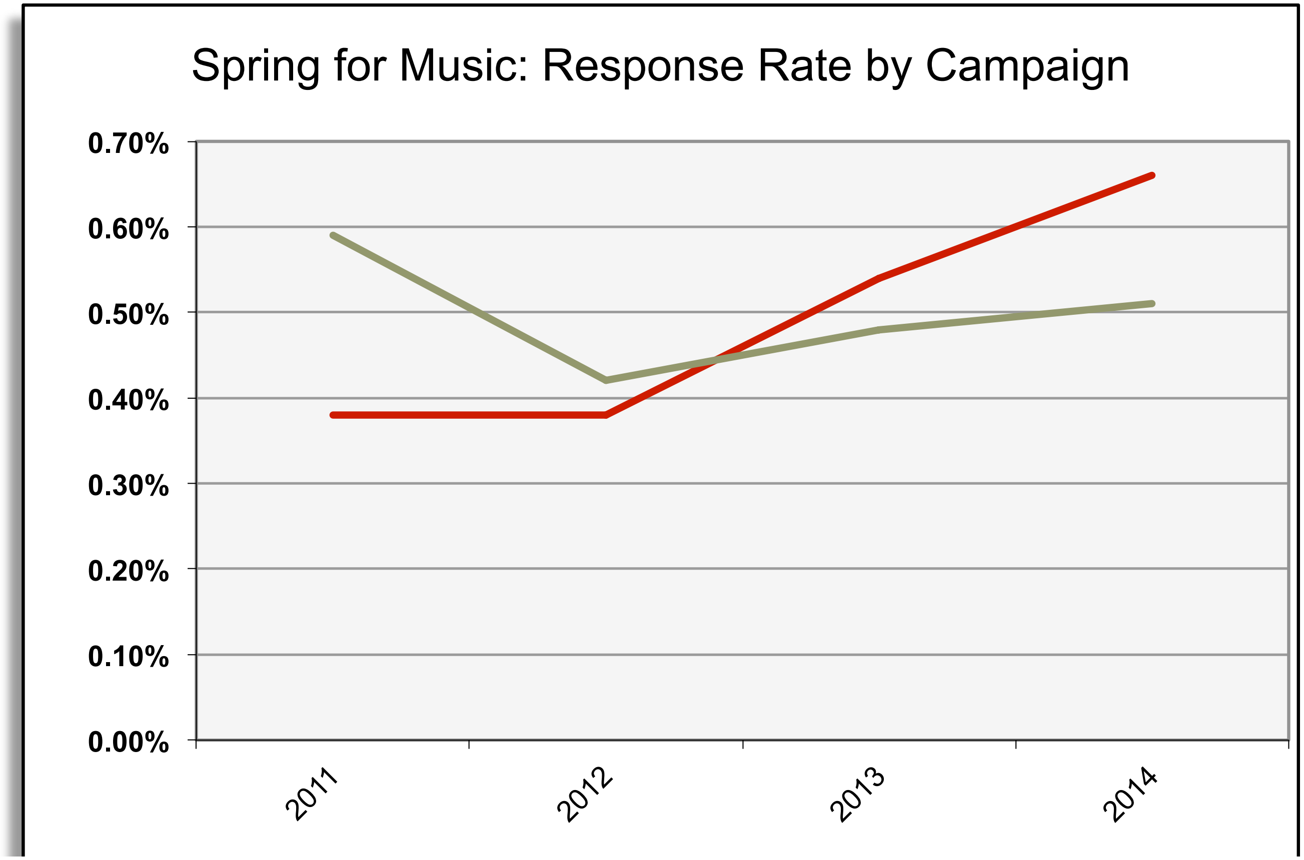
Among respondents to the on-line survey, 81% report attending Lincoln Center, 74% Carnegie Hall, 67% New York Philharmonic, 66% Metropolitan Opera, 32% Poisson Rouge, 5% Fall for Dance, Broadway shows at 54%

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

Response rates for modeled Experian prospects (red line) increased over the four years, as list trades held relatively steady (green line)…



CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

SPRING FOR MUSIC

Carnegie Hall ▪ 2011 – 2014

CONCLUSIONS / LEARNING POINTS:

Now with the experience of Spring For Music complete…

- ***Reasons for attending evolved*** *– SFM's on-line audience survey for 2012, 2013 and 2014 reports growing interest in the programs, as ticket price and venue diminish in importance*

- ***Timing kept sales momentum building*** *– early efforts focused on retention and relied on Carnegie Hall's season marketing from August to April; SFM direct mail launched early in April; advertising began soon after right up to the week of performances*

- ***Retention improved year to year, SFM was building a sustainable base*** *– 15% of promotable households attended two or more years of SFM; on-line survey results declare a much higher retention rate; Carnegie Hall reports 3-6% of SFM patrons return in another season*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

- ***SFM also created a new audience each season*** *– marketing efforts focused on attracting new audiences later in the sales cycle; each season of sales data further sharpened the patron profile to identify most likely prospects*

- ***Spring For Music cultivated three distinct audiences with limited crossover between concerts / broadcasts / websites:***
  - *Only 35% of respondents to the 2014 online survey visited SpringForMusic.com, an improvement over previous years*
  - *Only 22% of respondents to the on-line survey listened to any of the Spring For Music broadcasts*

- ***Broadcast audiences grew*** *– 168,000 radio listeners tuned in for at least part of 2014 broadcasts vs. 130,000 in 2013 – a 29% increase[7]; web streams over WQXR.com logged between 744 (Cincinnati) and 1,969 (Pittsburgh) listeners, but far outpaced by Seattle's 4,331 streams, with an additional 3,912 streams over National Public Radio*

[7] *Cume audiences for 2012 = 150,000.*

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

- ***Orchestra sales were confounding*** *– regardless of the attention paid, consistent Orchestra sales never materialized; orchestras without the will to leverage Spring For Music sold the fewest tickets, these were often larger orchestras; proximity to New York proved no predictor of high sales; curiously smaller orchestras in smaller markets made the greatest effort and delivered the biggest audiences*

- ***Group Sales efforts in 2012 and 2013 delivered minimal return*** *on investment; with no constituency to build beyond 2014, this expense was abandoned*

- ***Packaging saw tremendous growth each year****: 201 6-packs & 68 4-packs in 2014 vs. 133 6-packs and 57 4-packs in 2013; the surge began with advance sales and continued throughout the cycle*

- ***Mail Response improved each year****, 2014 response rate grew over 2013 to 0.7% (vs. target of 1%); nearly doubling from 2011 return; 2014 mailings profitable when portion of walk-up sales are considered; a patron profile emerged ever more sharply over four years*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

- ***Print Advertising*** *eliminated more costly outlets like The New York Times and The New Yorker[8], which did little to drive sales in 2011 and 2012; a relationship with Time Out NY with two weeks of advertising and promotional support appears to have yielded strong response*

- ***Internet Advertising proved far from profitable*** *after testing in various tactics and site options; the elimination of internet advertising in 2014 allowed for expansion in the more effective, efficient media above*

- ***Radio Advertising*** *was tested on WCBS and Bloomberg Radio in the week before the concert in 2013; spots voiced by Dick Cavett with high production values; 2014 focused radio advertising only on WCBS for a longer schedule; advertising was not purchased on WQXR (the festival's four-year media partner, or on WNYC) because of station policies prohibiting the inclusion price or descriptive copy essential to communicate SFM's programming philosophy*

[8] *Both are the most highly read publications of SFM patrons participating in the 2014 survey.*

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

- ***Messaging more and more reflected the overall SFM experience** as it also presented the artistic assets of each program*

- ***Ticket price** was tied to messaging; the brochure was redesigned to be more efficient in printing and postage, eventually closing the "break even" gap.*

- ***Cost of Sale was ever a challenge**; selling the least expensive ticket in the most expensive market*

Over four years, Spring For Music identified its audience, and how to reach it.

CRStager **marketing & audience development**
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**

NOTES:

CRStager marketing & audience development
250 West 57th Street – Suite 901 New York, New York 10107
917.940.1748 CRStager@CRStager.com **CRStager.com**