2011 Ticketing Software Satisfaction Survey

technology
INTHEARTS

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Technology in the Arts explores the intersection of arts management and technology to spark dialogue around the role of technology in our planning and programming, share best practices, and provide training in the use of online tools. Our services include consulting, professional development training, webinars, an online resource directory, monthly podcasts, and a discussion-based blog.

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Technology in the Arts is a series of services from the Center for Arts Management and Technology (CAMT), an applied research center at Carnegie Mellon University exploring ways in which arts managers can employ online technologies to more effectively meet their organizational goals and engage audiences.

Thanks!

CAMT would like to give special thanks to Amelia Northrup, David Dombrosky, Pat Germann, Tiffany Wilhelm, and Shryansh Mehta for their efforts in preparing this report.

Cover photo credit:
Gyorgy Kovacs via flickr (http://www.flickr.com/photos/32050584@N06/2998579599/)

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Introduction

About this survey

The variety of ticketing software solutions on the market today encompasses a tremendous range of capabilities, features, and price points. As a service to the arts and culture field, we created this survey to learn about organizational needs and to gauge how well current ticketing tools are meeting those needs.

In designing this survey, we thought the following information would be useful for other arts and cultural organizations seeking a ticketing solution:

- which attributes do arts organizations consider critical in a ticketing tool
- which factors influence organizations' ticketing software choices
- which tools are arts and cultural organizations using
- how satisfied are arts and culture organizations with their current ticketing solutions

Over 1,000 people started the survey, and a total of 957 evaluated at least one ticketing tool. The survey included 86 software tools as well as an "other" option for evaluating tools not on the list. A complete list of programs included in this survey can be found at the end of this report and online at http://bit.ly/2011ticketing.

To distribute the survey, we approached arts service organizations, arts councils, ticketing associations, and software vendors to share the survey with their members and clients. We found that the number of respondents evaluating a particular tool depended largely upon whether or not that vendor participated in the survey distribution. For this reason, the percentage of respondents using a particular tool cannot be construed as actual market share.

We changed a few questions this year, based on feedback from the 2009 survey. We also sought the opinions of vendors and arts service organizations on how the survey questions could be improved. Changes include:

- Added features regarding new technologies, like mobile and social media integration

- Added questions differentiating web-based vs. desktop software (hosted on the client's computer or server)

- Added question about ticket consortiums and outsourcing

Throughout this report, percentages are rounded to the nearest whole percent. Percentages may not total exactly 100% due to rounding.

How this report is structured

Because the 2009 survey's results skewed towards larger organizations, we examined this year's data in detail through the lens of organizational budget size, to keep benchmarks constant. The first section presents an overview of the data from all respondents. In the second section, we break out the results by budget size as follows:

Small: less than $500,000
Mid-sized: between $500,000 and $3 million
Large: between $3 million and $5 million
Very Large: greater than $5 million

Overview of Results
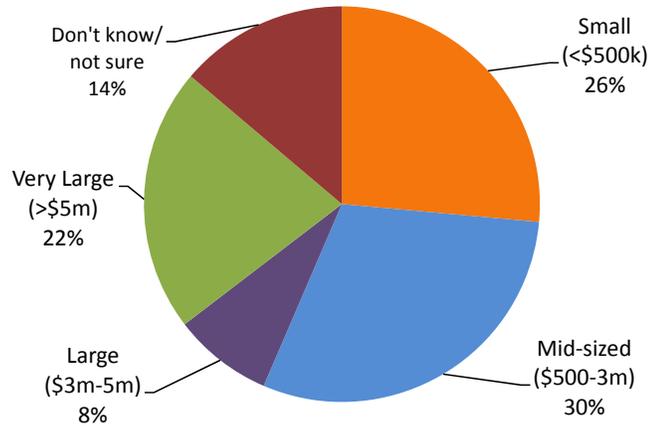
Profile of Respondents
Sample size: 957

Annual Operating Budget and Personnel

Survey respondents were evenly distributed, with small, mid-sized, and organizations with a greater than $3 million budget respectively comprising 25-30% of respondents each.

Overall, staff sizes correlated proportionately to respondents' budget sizes. Similarly, organizations with larger budgets tended to have more box office personnel.

What is your organization's annual operating budget?

Small (<$500k) 26%

Mid-sized ($500-3m) 30%

Large ($3m-5m) 8%

Very Large (>$5m) 22%

Don't know/ not sure 14%

Sector

Respondents were primarily from non-profit organizations. For-profit organizations comprised 8% of responses. Additionally, 13% classified their organization as part of a college or university.

Geography

Most respondents to this survey were located in the United States, representing 45 states and the District of Columbia. States with largest number of responses included California (123), New York (66), and Pennsylvania (65). Approximately 16% of organizations in this survey were located in Canada.

Organization Type and Discipline

The most common types of organizations represented in this survey were performance facilities (40% of respondents), performing groups (32%), and arts centers (26%). The primary focus for most organizations was the performing arts—more than 83% of responses identified one or more performing arts disciplines as a focus area.

Ticketing Software Usage

Organizations were asked about their software usage for both online ticket sales and internal ticket sales, which were defined as sales completed by the organization's staff in-person, by phone, or by mail. More than 86% of organizations use the same tool for both in-house and online ticket sales.

Among all respondents, 9% of organizations use different tools for internal and online sales. When filtered by budget size, the proportion was highest among small organizations, 14% of which used 2 or more ticketing tools.

Ticketing Software Needs

Sharing/Outsourcing

About 30% of organizations outsourced at least one aspect of their box office operations. Sharing options included:
- Online – using a shared online ticketing portal
- Phone orders – using a group call center with our own online program
- Walk Up – using a shared walk- up box office
- Discounts – using a discount/half-price ticket program

Sharing and outsourcing varied by organizational size. The most striking difference was the use of shared online services by small organizations.

Six percent of organizations who did not outsource or share said that they might consider outsourcing or functions of their box office if the right opportunity came along.

Which of the following ticketing components does your organization outsource or share with other organizations?

■ Small ■ Large *Sample size: 279/957*
■ Mid-sized ■ Very Large
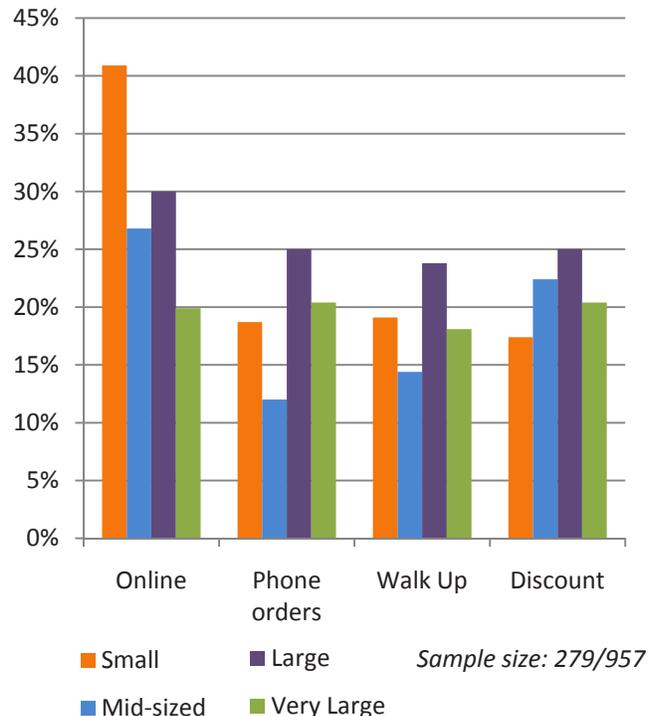
Critical Software Functions

When asked to identify which software functions are most critical in a ticketing solution, the most frequently selected attribute across budget sizes was online sales. Credit card processing, which was the most popular function in the 2009 survey, moved down to the second most-selected attribute. Other commonly selected attributes were similar to the 2009 survey results.

As budget size increased, all attributes seemed to become more critical to survey respondents. For small organizations, the least selected attribute was chosen by 18% of those organizations. In contrast, the least selected attribute among very large organizations was selected by over 28% of those respondents.

Most frequently selected attributes:
1. Online sales (91%)
2. Credit card processing (90%)
3. Seat mapping/reserved ticketing (82%)
4. Custom reporting (78%)
5. Multi-user (multiple sellers logged in at once) (77%)
5. Customer support / tech support (77%)

Least selected attributes:
1. Mobile integration (24%)
2. Demand-based pricing capability (37%)
3. Barcodes/gate control (38%)
3. Ability to print images or logo on ticket (38%)
4. Social media integration (40%)
5. Security features/ticket forgery prevention (41%)

Ticketing Software Needs

Reserved Seat vs. General Admission

Survey respondents were asked which types of ticketing are available to them with their current system. Responses were largely dependent on budget size, as shown below. Very large organizations were most likely to offer both reserved-seat and general admission ticketing, and small organizations were least likely. Out of small organizations that offered only one type of ticketing, more offered general admission than reserved-seat.

Which types of ticketing are available to you with your current system?
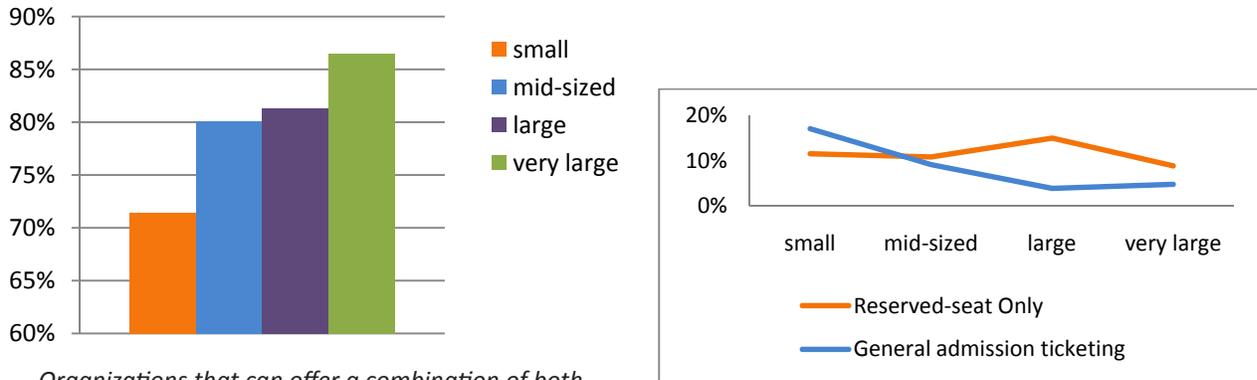
Organizations that can offer a combination of both reserved-seat ticketing and general admission ticketing

Pricing

Survey respondents were asked how they pay or paid for their internal and online ticketing system. Internal sales were defined as sales completed by the organization's staff in-person, by phone, or by mail. The majority of respondents paid a one-time fee, pay a monthly or annual fee, and/or add service charges to customers' ticket purchases for the system that they use internally. Approximately 2% don't pay for their system, either by receiving services in-kind or building their own system.

As mentioned previously, 9% of organizations use different tools for internal and online sales. Of organizations that use a separate online ticketing system, the majority (52%) have customers pay for it through fees added to their ticket purchases.

How do you pay for your primary INTERNAL ticketing system? (Check all that apply.)
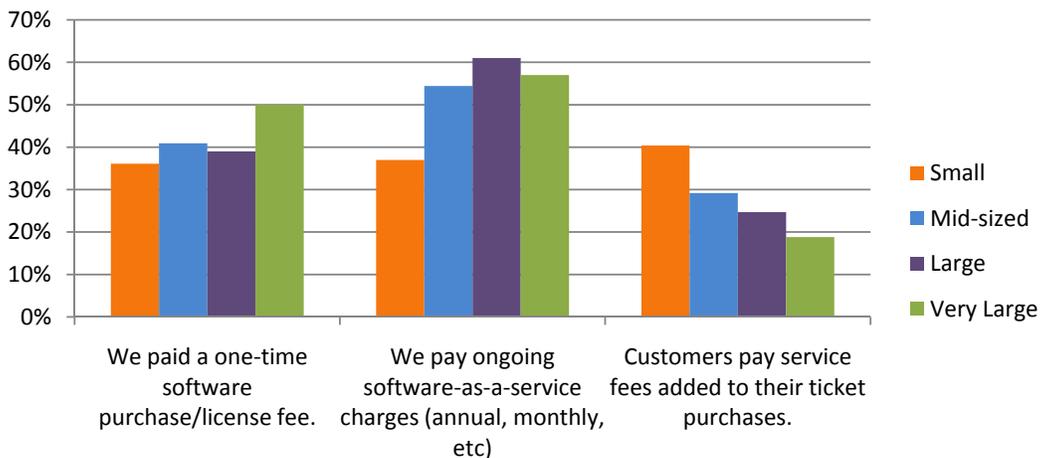
Ticketing Software Needs

Reasons for Software Choice

Survey respondents were asked which factors contributed to their software choice. Reasons varied widely across budget sizes, as shown below. This chart compares the two most common reasons among small organizations (price and user-friendliness) with those most common among the very large organizations (customization and specific functions and features).

What were the most important aspects that led to your decision to use this software? (Choose up to 3)
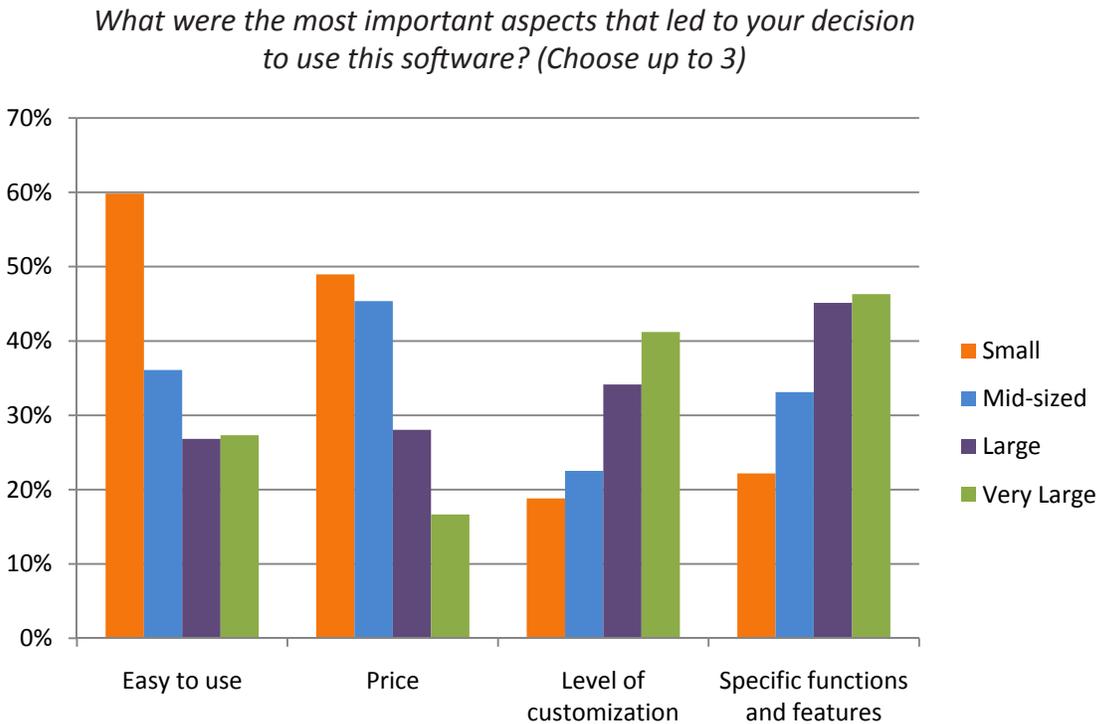
System Inheritance

Approximately one third of respondents "inherited" their ticketing system. In each category 1/4 to 1/3 of respondents indicated that they had not chosen the system that they are using now.

I didn't assist in choosing it - I inherited the system
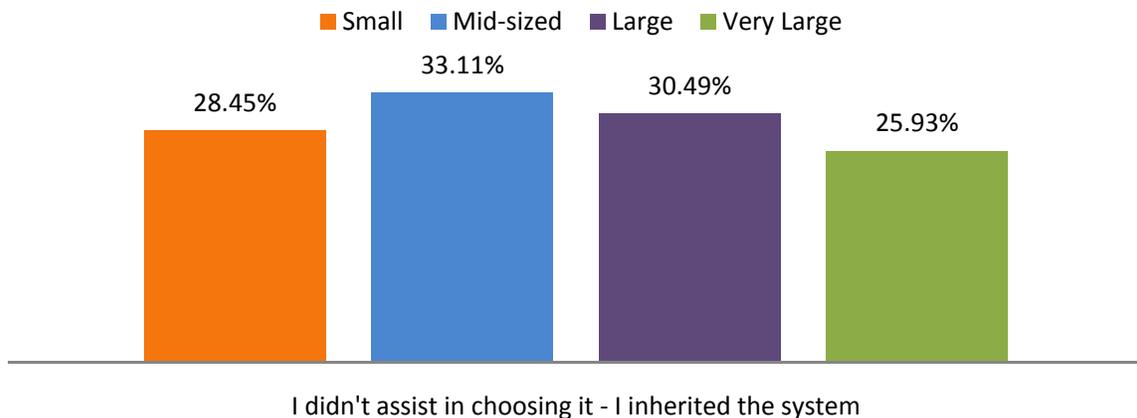
Software Usage

The following table displays the number of survey respondents using each software system, either as a primary or a secondary ticketing tool. (Systems with no responses are not included below, but they are included in the full list of ticketing systems at the end of the report). Though a few systems comprise a large number of survey responses, the data still suggests a wide range of systems in use by the field. "Other" systems included ticketing systems not on our list, software systems not designed specifically for ticketing (such as PayPal and Microsoft Excel), and custom systems.

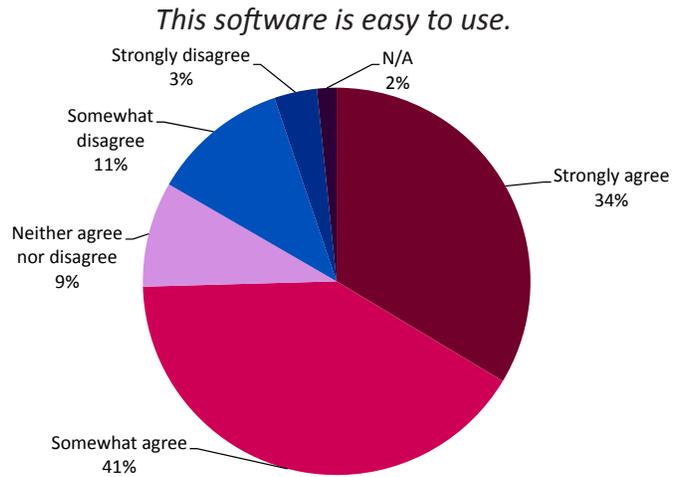| Software Tool (used by respondent as either a primary or secondary system)	Number of users*	Software Tool (used by respondent as either a primary or secondary system)	Number of users*	Software Tool (used by respondent as either a primary or secondary system)	Number of users*
Admission - a division of Ticket-master	3	Paciolan	10	Ticketmaster: Archtics	9
Agile Ticketing	3	Patron Technology	19	Ticketmaster: Vista	4
AstorStreet Smartware	2	PatronEdge by Blackbaud	19	TicketMeister Pro	1
AudienceView Ticketing	21	Printtix USA	11	TicketOps	1
BOW and/or BOW-net by Canadian Theatre Software	1	ProVenue or ProVenueMax by Tickets.com	39	Ticketpro	1
Box Office Tickets	3	Radiant	4	TicketReturn	1
Boxxo	1	Reservatech	1	TICKETsage	2
Brown Paper Tickets	16	RTS - Ready Theater Systems	1	TicketScene	1
Choice Ticketing	28	SABO by Seat Advisor	86	TicketSolve	1
Click4Tix	1	SeatYourself	1	TicketsWest	2
Enta	1	SellingTickets	1	Ticketweb	2
eTix	1	ShoWare by VisionOne, Inc.	6	Tick-It! Trak Pro and/or Tick-It! 2K+	2
Eventbrite	64	ShowClix	4	tix.com	19
Eventim InHouse / ShowSoft	1	*Siriusware*	4	TixHub	3
EZTicketLive	1	Smartix	1	Toptix	1
Folio Box Office by Martech Systems	4	Spektrix	5	Total Info by Easy-Ware	12
Front Gate Solutions	3	Tessitura	262	TyTix	4
Galaxy by Gateway Ticketing Systems	4	Theatre Manager by Arts Management Systems	148	University Tickets	9
Gate 13	4	Thundertix	3	Vendini: TicketAgent or Ticket-Line	20
HandyTix	1	Ticket Force	4	WebTix and/or WinTix by Center Stage Software	75
InstantSeats	1	Ticket Turtle: Basic, Premier, or Pro	8	Custom-built systems	41
Lexi	1	TicketBiscuit	1		
MIVA	1	TicketFusion	1		
New Concept Software	3	TicketGuys	1		
OmniTicket	2	TicketLeap	7		
OvationTix by TheaterMania	10	TicketmakerVantix (ATMS)	3		
		Ticketmaster Classic	23		

*Because respondents do not represent a true cross-section of the arts and culture community, this data cannot be used to infer market share.

Software Satisfaction

Organizations were asked how much they agreed or disagreed with a series of qualitative statements about their in-house and/or online ticketing system. A majority of respondents in this survey agreed that their systems were easy to use and met their needs. Over 2/3 of respondents agreed that they would recommend their systems to other organizations, a slight increase from the 2009 survey.

User-friendliness
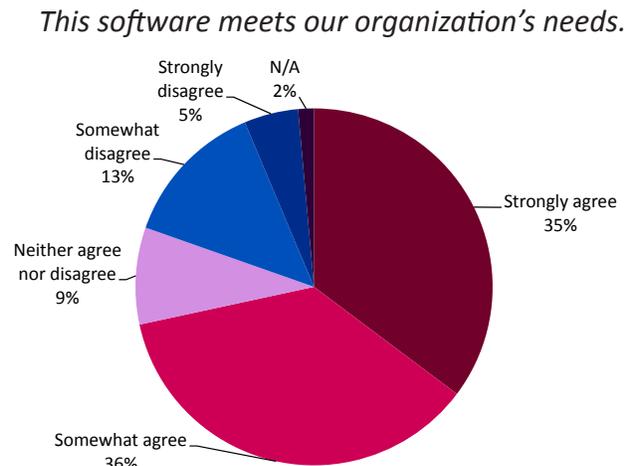
This software is easy to use.

- Strongly disagree 3%
- N/A 2%
- Somewhat disagree 11%
- Neither agree nor disagree 9%
- Strongly agree 34%
- Somewhat agree 41%

Meeting organizational needs

This software meets our organization's needs.

- Strongly disagree 5%
- N/A 2%
- Somewhat disagree 13%
- Neither agree nor disagree 9%
- Strongly agree 35%
- Somewhat agree 36%

Willingness to recommend

I would recommend this software to other organizations.

- N/A 2%
- Strongly disagree 9%
- Somewhat disagree 11%
- Neither agree nor disagree 13%
- Strongly agree 40%
- Somewhat agree 25%
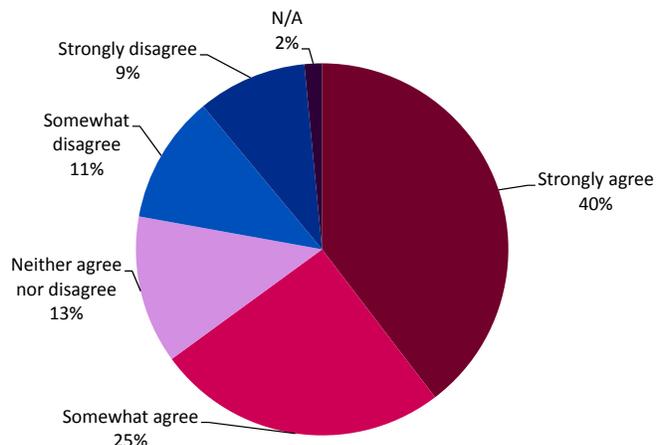
Small Organizations

Annual Budget Size less than $500,000

Sample Size: 238

Profile of Respondents
Sample size: 238

Job Title

More than 1/3 of respondents from small organizations were Executive Directors, and about 1/3 from small organizations were Box Office Managers. Common "other" job titles included Board Member, Artistic Director, Treasurer, and roles that were composites of several positions.

Which of the following most accurately describes your position?

- Marketing or Communications staff 8%
- Other 10%
- Box office manager 31%
- Fundraising or Development staff 2%
- Business or Operations staff 4%
- Box office staff 3%
- House management staff 0%
- Executive or Managing Director 39%
- IT Staff 3%
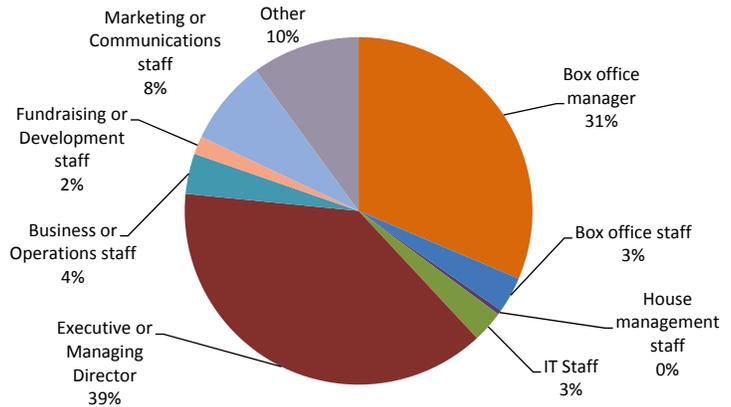
Full-Time Staff Size

Most small organizations in this survey operate with a small staff. Over half of these organizations had 2 or fewer full-time staff members and nearly 1/3 had 3 to 5 staff members.

How many full-time staff members are employed by your organization?

- more than 75 2%
- 16 to 30 3%
- 6 to 15 11%
- Don't know/not sure 1%
- None 24%
- 3 to 5 29%
- 1 or 2 30%
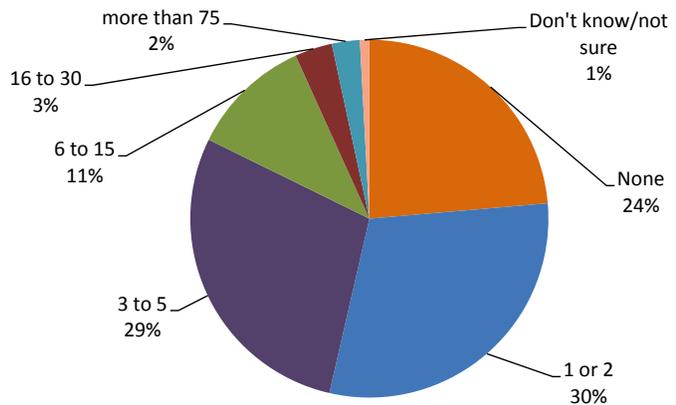
Box Office Staff Size

Nearly 3/4 of small organizations had 5 or fewer people working in their box office. Seven percent reported no one working in their box office. It is possible these organizations have no physical box office, or they have staff in other departments who handle ticket sales.

How many people work in your box office(s)? (Includes full-time employees, part-time employees, and volunteers)

- Don't know/not sure 1%
- 16 to 30 4%
- 6 to 15 22%
- None 7%
- 1 or 2 36%
- 3 to 5 30%
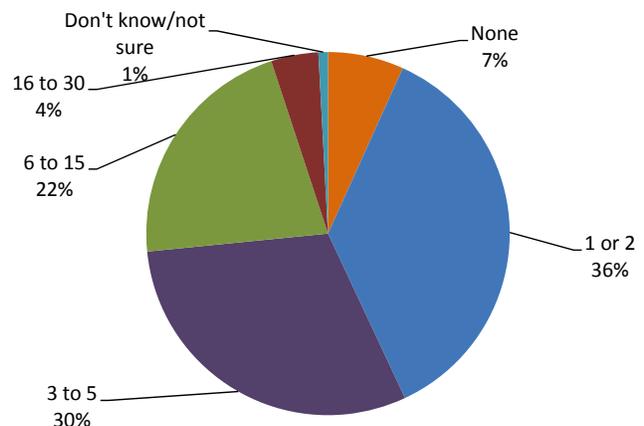
Profile of Respondents
Sample size: 238

Type(s) of Organization

Performing groups were the most common type of small organization in this survey, with 67% identifying themselves as either a performance facility or performing groups. Only five of these respondents categorized their organizations as museums.

Small organizations were the most likely to rent performance space and the least likely to own their own space when compared to organizations with larger budgets.

Which of the following best describes your organization? (Choose all that apply)

Category	Value
Arts Center	48
Arts Council/Agency	7
Arts Education Facility	14
Arts Service Organization	12
Cinema	4
College/University	42
Conservation	0
Arts Presenter	32
Festival/Fair	4
Gallery/Exhibition Space	8
Museum - Art	2
Museum - Other	3
Other	26
Performance facility	80
Performing group	81
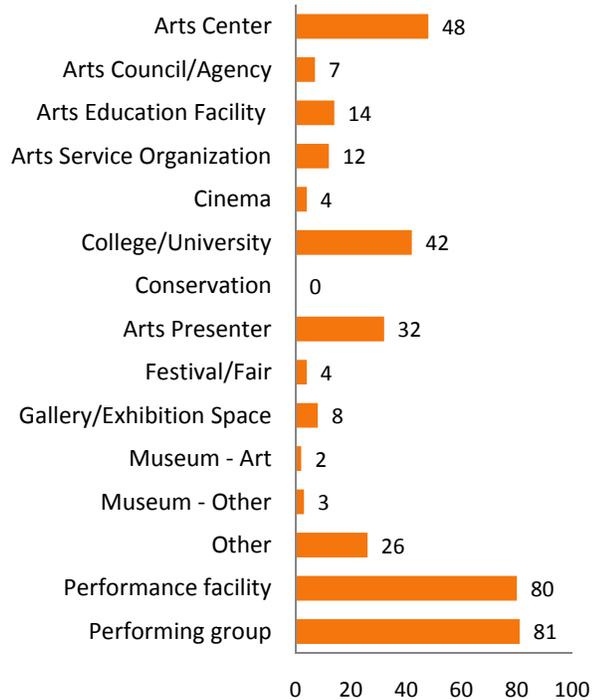
Organization Discipline(s)

Among those who chose "other," most described a combination of disciplines. Additional focus areas mentioned were athletics, heritage, and comedy.

Small organizations were the most likely to identify themselves as for-profit or as part of a university/college operation.

Which of the following disciplines represents your organization's focus area? (Choose all that apply)

Category	Value
Theater--General	158
Theater--Youth	79
Theater--Musical Theater	92
Music--Symphony/ Orchestra	63
Music--Chamber Ensemble	55
Music--Choral	77
Music--Opera	41
Music--Other	88
Dance	80
Visual Arts	42
Design Arts	6
Crafts	7
Photography	13
Literary Arts	17
Media Arts (film/video)	32
Other	22
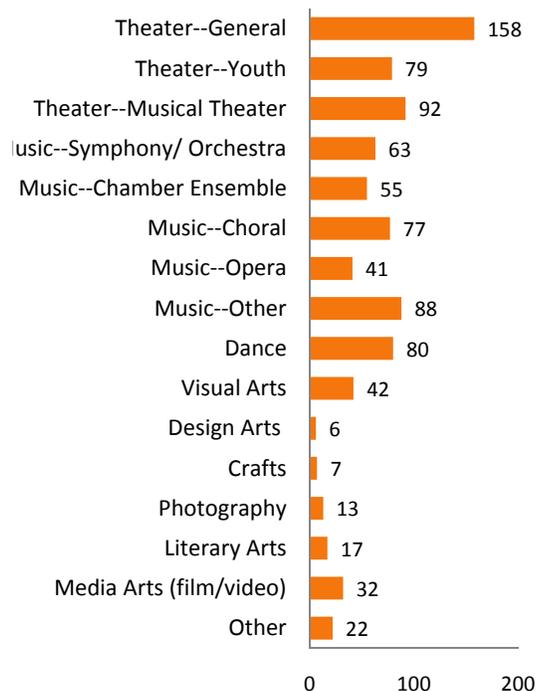
Ticketing Needs

Critical Attributes

Respondents from small organizations most often selected credit card processing, online sales, and customer support. "Other" responses included "customizable online point of sale", "handle multiple venues", "printing receipts", "multiple discount codes", "user friendly", and ability to integrate email marketing.

Customer service was selected more frequently in small organizations than any other budget size. Larger organizations also tended to select multi-user capabilities and customizable sales reports more frequently than small organizations.

Most frequently selected attributes:
1. Credit card processing (84%)
2. Online sales (84%)
3. Customer support / tech support (73%)
4. Seat mapping/reserved ticketing (72%)
5. General admission ticketing (72%)

Least selected attributes:
1. Demand-based pricing capability (18%)
2. Mobile integration (21%)
3. Barcodes/gate control (29%)
4. Integrates with our existing customer relationship/donor management system (32%)
5. Security features (ticket forgery prevention (32%)

Which of the following functions does your organization consider critical in a box office management system? (select all that apply)

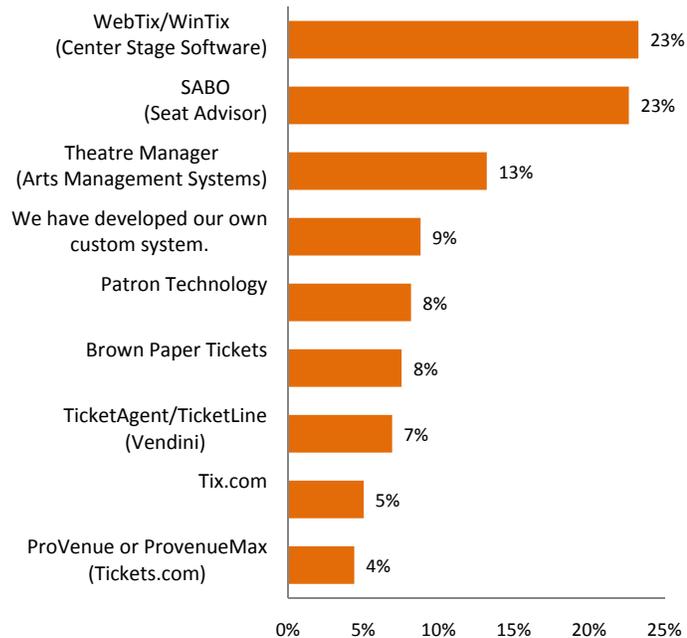| Function	Value
Online sales	200
Credit card processing	200
Customer support/tech support for our staff	174
Seat mapping/reserved ticketing	173
General admission ticketing	172
Subscriptions/season ticket capability	161
Customizable sales reports	151
Subscription sales/discount packages	141
Ability to add a suggested donation	135
Automated sales reports	134
Multi-user (multiple users can log in at once)	134
Group sales	122
At-home ticket printing for customers	116
Customer relationship/donor management…	111
Social media integration	105
Ability to print images or logo on ticket	88
Includes a membership management module	87
Integrates with our existing customer…	77
Security features (ticket forgery prevention)	77
Barcodes/gate control	68
Mobile integration	50
Demand-based pricing capability	44
Other	10

50%

Software Usage

Small organizations used a broad range of ticketing systems. Only two systems, WebTix/WinTix and SABO's Seat Advisor were used by more than 15% of small organizations in this survey. Several organizations sold tickets through their online store or through services such as PayPal or eTapestry. Three organizations described using a custom system for online sales.

Small organizations were the most likely of any budget category to access their internal system (system used by your staff to complete sales in person, by phone, or by mail) through an online system, rather than through software hosted on the organizations' computers/servers.

Which system do you use for internal, online or secondary ticket sales?
("Internal sales" are ticket sales completed by your staff in person, by phone, or by mail.)

System	Percentage
WebTix/WinTix (Center Stage Software)	23%
SABO (Seat Advisor)	23%
Theatre Manager (Arts Management Systems)	13%
We have developed our own custom system.	9%
Patron Technology	8%
Brown Paper Tickets	8%
TicketAgent/TicketLine (Vendini)	7%
Tix.com	5%
ProVenue or ProvenueMax (Tickets.com)	4%

Criteria for Software Choice: Internal System

1. Easy to use (58%)
2. Price (46%)
3. Inherited the system (28%)
4. Specific functions and features (25%)
5. Easy to train staff (24%)

This year "Easy to use" surpassed "Price" as the top criteria for choosing the software system. "Recommendation from a colleague" dropped from a reason cited by 16% respondents to 5% this year.

Additional Ticketing Systems

Of small organizations, 6% reported using one or more additional ticketing systems for online ticket sales or other functions. "Other" was the most common secondary system, which included programs like PayPal. Several organizations described capturing information online and re-entering it into their primary ticketing system or a database system like eTapestry.

*Because respondents do not represent a true cross-section of the arts and culture community, this data cannot be used to infer market share.

Software Satisfaction

Three-quarters of small organizations responding to this survey agreed that their system is easy to use. Over half agreed that the system meets their organization's needs. Small organizations were the most likely of any budget category to agree that their software system was easy to use.

User-friendliness

This software is easy to use.

- Strongly disagree 3%
- N/A 1%
- Somewhat disagree 8%
- Neither agree nor disagree 10%
- Strongly agree 43%
- Somewhat agree 35%

Meeting organizational needs

This software meets our organization's needs.

- Strongly disagree 2%
- N/A 1%
- Somewhat disagree 15%
- Neither agree nor disagree 9%
- Strongly agree 38%
- Somewhat agree 35%

Willingness to recommend

I would recommend this software to other organizations.

- N/A 2%
- Strongly disagree 10%
- Somewhat disagree 10%
- Neither agree nor disagree 14%
- Strongly agree 40%
- Somewhat agree 24%

Mid-Sized Organizations

Annual Budget Size $500,000 to $3 million

Sample Size: 302

Profile of Respondents

Sample size: 302

Job Title

About 1/3 of surveys from these organizations were completed by a Box Office Manager, and 1/3 by Executive Directors. "Other" job titles included Operations Manager, Events Manager, Patron services manager, and roles that were composites of several positions.

Which of the following most accurately describes your position?

- Other (please specify) 8%
- Marketing or Communications staff 11%
- Fundraising or Development staff 5%
- Business or Operations staff 8%
- Executive or Managing Director 30%
- IT Staff 5%
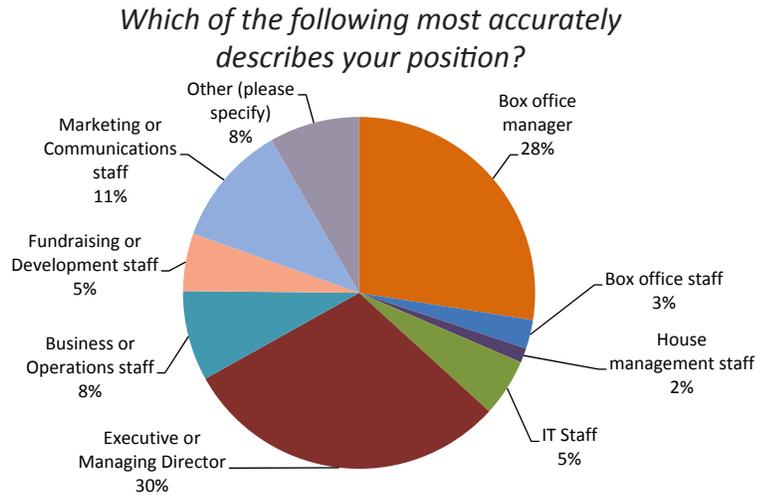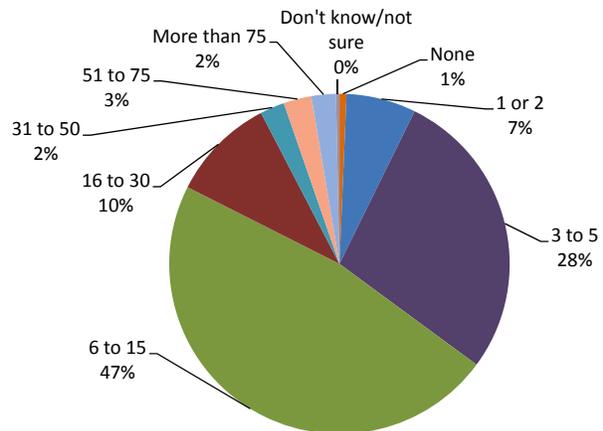- House management staff 2%
- Box office staff 3%
- Box office manager 28%

Full-Time Staff Size

Most mid-sized organizations responding to this survey had at least one full-time staff member. About 1/2 of these organizations had 6 to 15 full-time staff members, and about 35% had 1 to 5 full-time staff members.

How many full-time staff members are employed by your organization?

- More than 75 2%
- Don't know/not sure 0%
- None 1%
- 51 to 75 3%
- 31 to 50 2%
- 16 to 30 10%
- 1 or 2 7%
- 3 to 5 28%
- 6 to 15 47%

Box Office Staff Size

The majority of mid-sized organizations (63%) had 1 to 5 people who worked in their box office and 34% had 6 or more workers. Only 2% reported no one working in their box office. It is possible these organizations have no physical box office, or they have staff in other departments who handle ticket sales.

How many people work in your box office(s)? (Includes full-time employees, part-time employees, and volunteers)

- More than 30 1%
- 16 to 30 4%
- 6 to 15 29%
- Don't know/not sure 1%
- None 2%
- 1 or 2 18%
- 3 to 5 45%
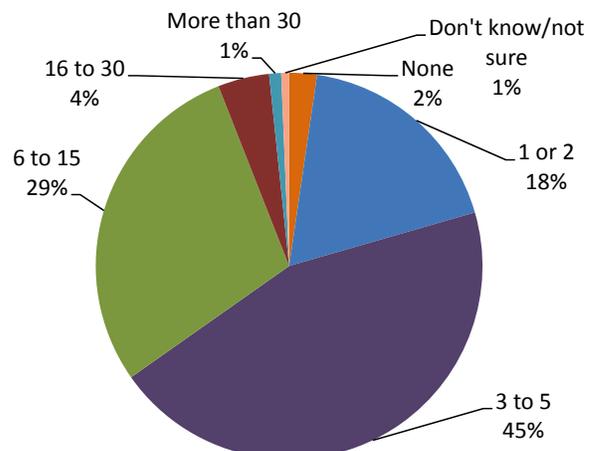
Profile of Respondents
Sample size: 302

Type(s) of Organization

"Other" types of organizations in the mid-sized budget category included sports teams, dinner theaters, circuses, arena/trade centers, and cross-disciplinary organizations.

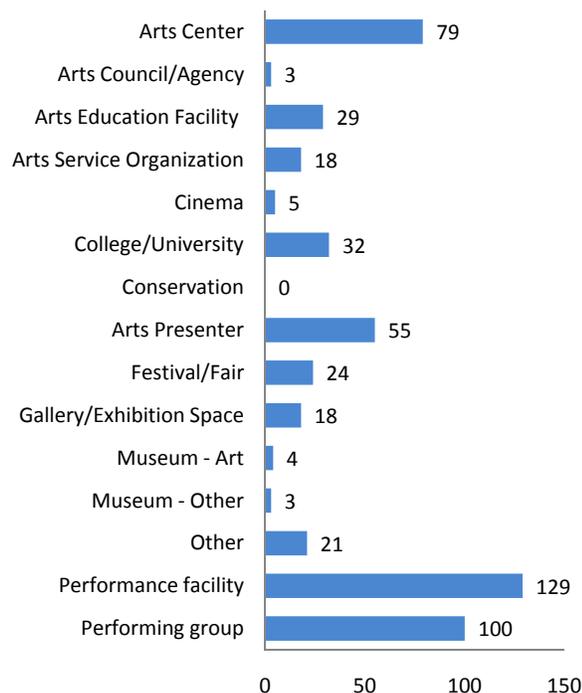About 2/3 of mid-sized organizations owned their own performance space and 1/3 rented their performance space.

Which of the following best describes your organization?
(Choose all that apply)

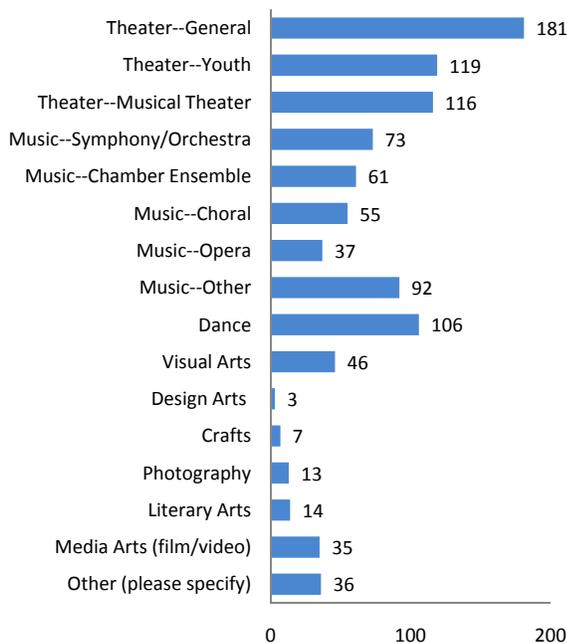| Organization Type	Count
Arts Center	79
Arts Council/Agency	3
Arts Education Facility	29
Arts Service Organization	18
Cinema	5
College/University	32
Conservation	0
Arts Presenter	55
Festival/Fair	24
Gallery/Exhibition Space	18
Museum - Art	4
Museum - Other	3
Other	21
Performance facility	129
Performing group	100

Organization Discipline(s)

Theatre, dance, and various musical disciplines were chosen most often in the mid-sized budget category. Of organizations that chose "other" focus areas, 12 described programming in multiple disciplines. Additionally, organizations identified focus areas such as athletics, education, community events, lectures, race track, and road house.

The majority (about 80%) of mid-sized organizations described themselves as non-profit, with 12% identifying themselves as part of a university/college.

Which of the following disciplines represents your organization's focus area? (Choose all that apply)

Discipline	Count
Theater--General	181
Theater--Youth	119
Theater--Musical Theater	116
Music--Symphony/Orchestra	73
Music--Chamber Ensemble	61
Music--Choral	55
Music--Opera	37
Music--Other	92
Dance	106
Visual Arts	46
Design Arts	3
Crafts	7
Photography	13
Literary Arts	14
Media Arts (film/video)	35
Other (please specify)	36

Ticketing Needs

Critical Attributes

For mid-sized organizations, online sales surpassed credit card processing as the most selected attribute. "Other" responses also included integration with website and database systems, class enrollment capacity, and interactive seating map.

As with the other budget categories, online sales and credit card processing were the top two attributes.
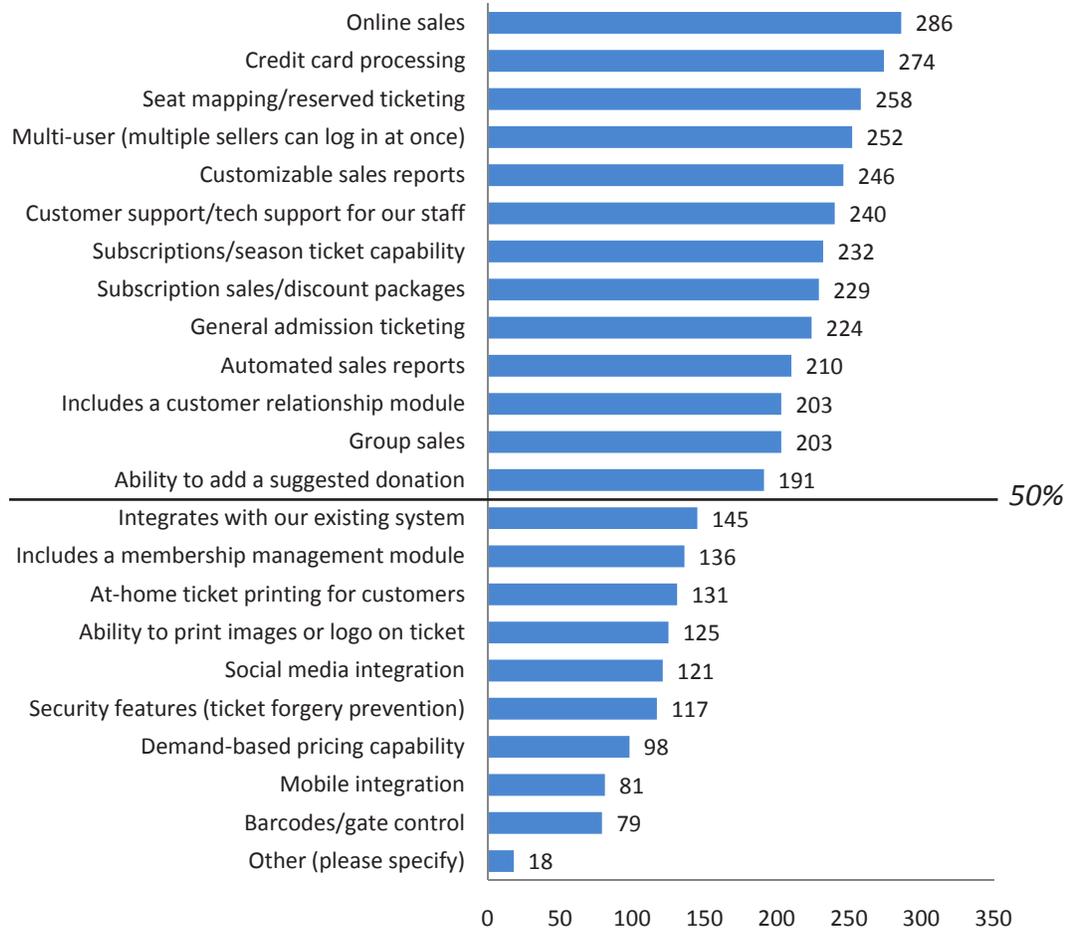
Most frequently selected attributes:
1. Online sales (95%)
2. Credit card processing (91%)
3. Seat mapping / reserved ticketing (85%)
4. Multi-user (multiple sellers can be logged in at once) (83%)
5. Customizable sales reports (82%)

Least selected attributes:
1. Barcodes / gate control (26%)
2. Mobile integration (27%)
3. Demand-based pricing capability (33%)
4. Security features (ticket forgery prevention) (39%)
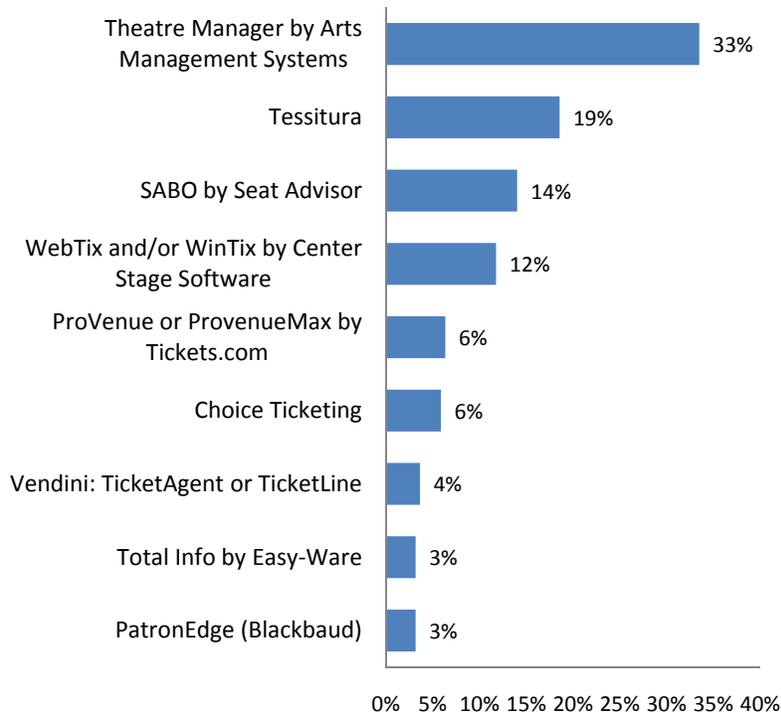5. Social media integration (40%)

Which of the following functions does your organization consider critical in a box office management system? (select all that apply)

Attribute	Value
Online sales	286
Credit card processing	274
Seat mapping/reserved ticketing	258
Multi-user (multiple sellers can log in at once)	252
Customizable sales reports	246
Customer support/tech support for our staff	240
Subscriptions/season ticket capability	232
Subscription sales/discount packages	229
General admission ticketing	224
Automated sales reports	210
Includes a customer relationship module	203
Group sales	203
Ability to add a suggested donation	191
Integrates with our existing system	145
Includes a membership management module	136
At-home ticket printing for customers	131
Ability to print images or logo on ticket	125
Social media integration	121
Security features (ticket forgery prevention)	117
Demand-based pricing capability	98
Mobile integration	81
Barcodes/gate control	79
Other (please specify)	18

50%

Software Usage

Nearly 25% of mid-sized organizations responding to this survey used Theater Manager as their primary internal ticketing tool. Approximately 4% listed "other" systems. Most common among these was Box Office Tickets.

Which system do you use for internal, online or secondary ticket sales?
("Internal sales" are ticket sales completed by your staff in person, by phone, or by mail.)

System	%
Theatre Manager by Arts Management Systems	33%
Tessitura	19%
SABO by Seat Advisor	14%
WebTix and/or WinTix by Center Stage Software	12%
ProVenue or ProvenueMax by Tickets.com	6%
Choice Ticketing	6%
Vendini: TicketAgent or TicketLine	4%
Total Info by Easy-Ware	3%
PatronEdge (Blackbaud)	3%

0% 5% 10% 15% 20% 25% 30% 35% 40%

Primary Criteria for Software Choice: Internal System

1. Price (45%)
2. Easy to use (34%)
3. Specific functions and features (34%)
4. Level of customization (23%)
5. Customer service (18%)

Respondents from mid-sized organizations were the most likely (33%) of any budget category to say that they inherited the system, rather than choosing it themselves.

Additional Ticketing Systems

Of mid-sized organizations, about 10% of respondents used different systems for internal and online ticket sales. This is a decline from 17% in the 2009 survey.
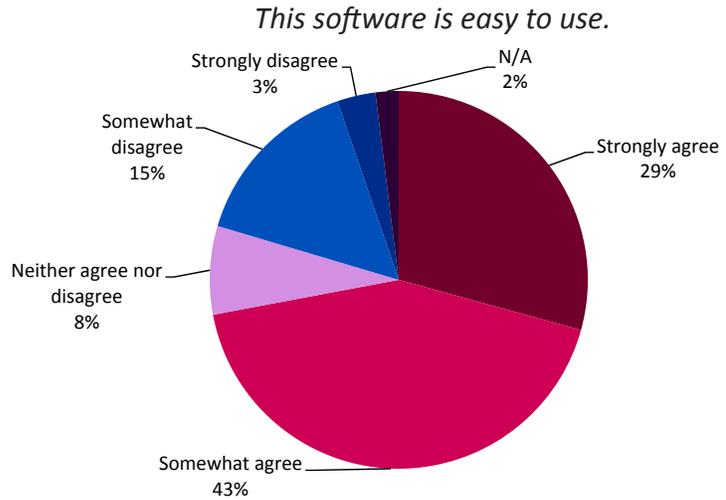
Of those who described an additional online system, most (22%) described a custom-built system or PrintTix USA (14%).

*Because respondents do not represent a true cross-section of the arts and culture community, this data cannot be used to infer market share.
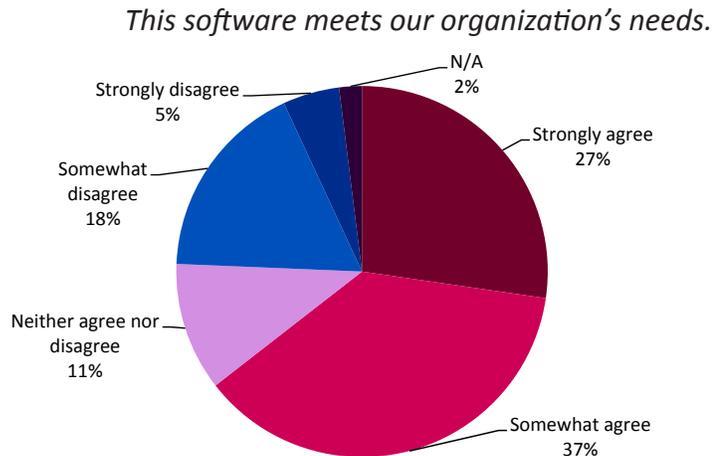
Software Satisfaction

Though over half of mid-sized organizations responding to this survey agreed with the qualitative statements below, these organizations were the least likely of any budget category to agree that they would recommend their system to other organizations.
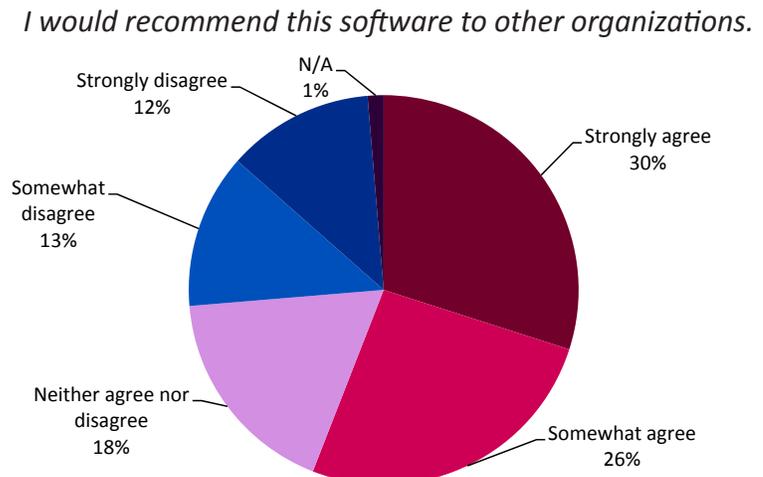
User-friendliness

This software is easy to use.

- Strongly disagree 3%
- N/A 2%
- Somewhat disagree 15%
- Strongly agree 29%
- Neither agree nor disagree 8%
- Somewhat agree 43%

Meeting organizational needs

This software meets our organization's needs.

- Strongly disagree 5%
- N/A 2%
- Somewhat disagree 18%
- Strongly agree 27%
- Neither agree nor disagree 11%
- Somewhat agree 37%

Willingness to recommend

I would recommend this software to other organizations.

- Strongly disagree 12%
- N/A 1%
- Somewhat disagree 13%
- Strongly agree 30%
- Neither agree nor disagree 18%
- Somewhat agree 26%

Large Organizations
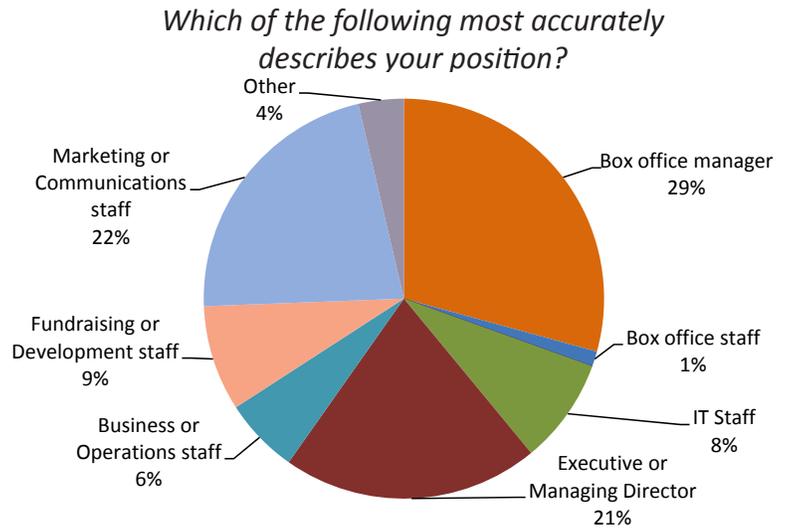
Annual Budget Size $3 million to $5 million

Sample Size: 81

Profile of Respondents
## Sample size: 81

Job Title

Box Office Managers made up nearly 1/3 of respondents from large organizations, with Marketing/ Communication staff and Executive or Managing Director each comprising over 1/5 of respondents. Common "other" job titles included patron or audience services manager positions or roles that were composites of several positions.

Which of the following most accurately describes your position?

Other 4%
Marketing or Communications staff 22%
Fundraising or Development staff 9%
Business or Operations staff 6%
Box office manager 29%
Box office staff 1%
IT Staff 8%
Executive or Managing Director 21%

Full-Time Staff Size

Approximately 1/3 of large organizations employed 6 to 15 full-time staff members, 1/3 employed 16 to 30, and 1/3 employed over 30.

How many full-time staff members are employed by your organization?

None 0%
1 or 2 1%
more than 75 8%
51 to 75 6%
31 to 50 16%
3 to 5 1%
6 to 15 34%
16 to 30 34%
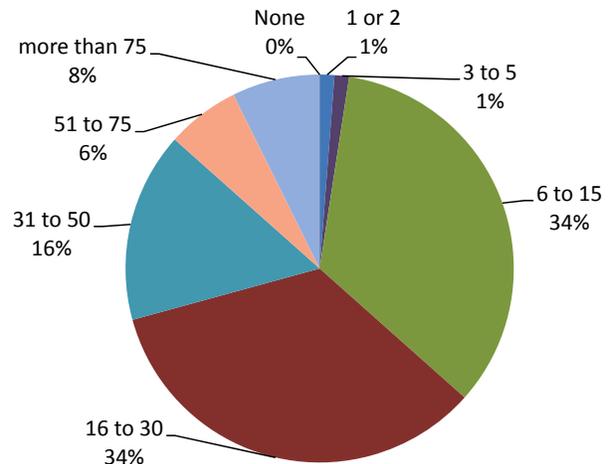
Box Office Staff Size

The majority of large organizations responding to this survey had 3 to 15 employees working in their box office(s).

How many people work in your box office(s)?
(Includes full-time employees, part-time employees, and volunteers)

Don't know/not sure 1%
More than 30 7%
16 to 30 9%
None 1%
1 or 2 17%
3 to 5 26%
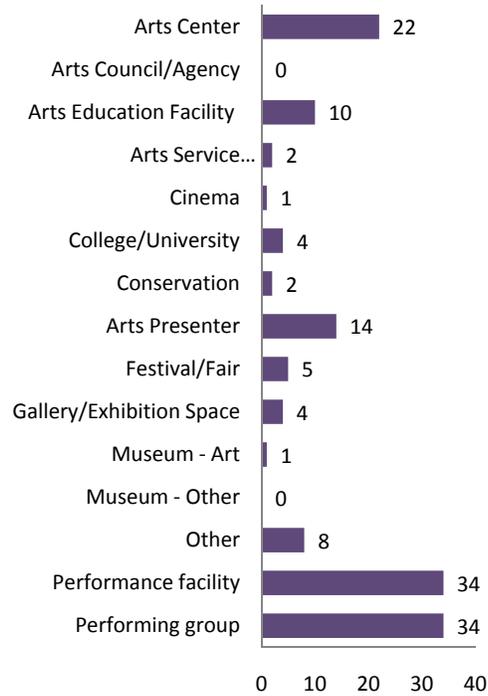6 to 15 39%
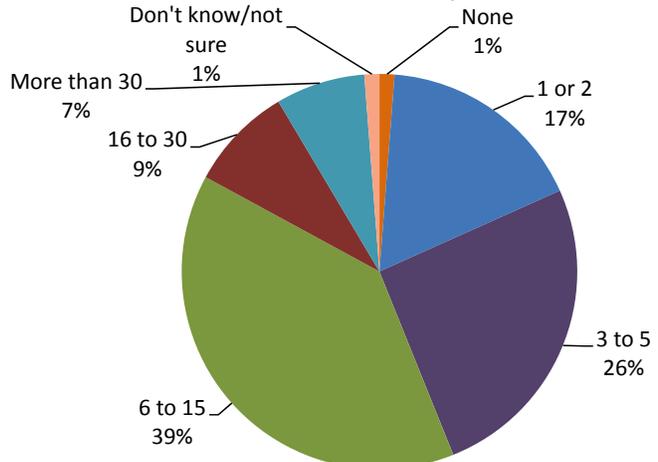
Profile of Respondents
Sample size: 81

Type(s) of Organization

"Other" respondents primarily described multidisciplinary arts presenters.

In this survey, large organizations (36%) were slightly more likely than mid-sized organizations (31%) to rent their performance space rather than own it.

Which of the following best describes your organization? (Choose all that apply)
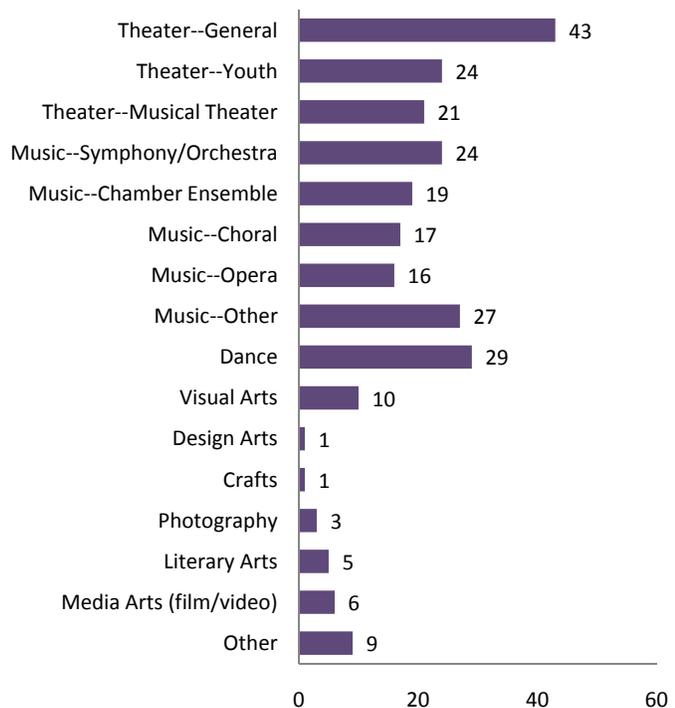
Type	Value
Arts Center	22
Arts Council/Agency	0
Arts Education Facility	10
Arts Service...	2
Cinema	1
College/University	4
Conservation	2
Arts Presenter	14
Festival/Fair	5
Gallery/Exhibition Space	4
Museum - Art	1
Museum - Other	0
Other	8
Performance facility	34
Performing group	34

Organization Discipline(s)

Theater was the primary focus are for large organizations in this survey. "Other" disciplines mentioned were comedians/lecture series, athletics, and conservation organizations like public gardens and horticultural organizations.

Respondents in this category were primarily non-profit organizations.

Which of the following disciplines represents your organization's focus area? (Choose all that apply)

Discipline	Value
Theater--General	43
Theater--Youth	24
Theater--Musical Theater	21
Music--Symphony/Orchestra	24
Music--Chamber Ensemble	19
Music--Choral	17
Music--Opera	16
Music--Other	27
Dance	29
Visual Arts	10
Design Arts	1
Crafts	1
Photography	3
Literary Arts	5
Media Arts (film/video)	6
Other	9

Ticketing Needs

Critical Attributes

For large organizations, demand-based pricing was more important than for mid-sized or small organizations, both of which had this attribute in their bottom five.

As with the other budget categories, online sales and credit card processing were the top two attributes.
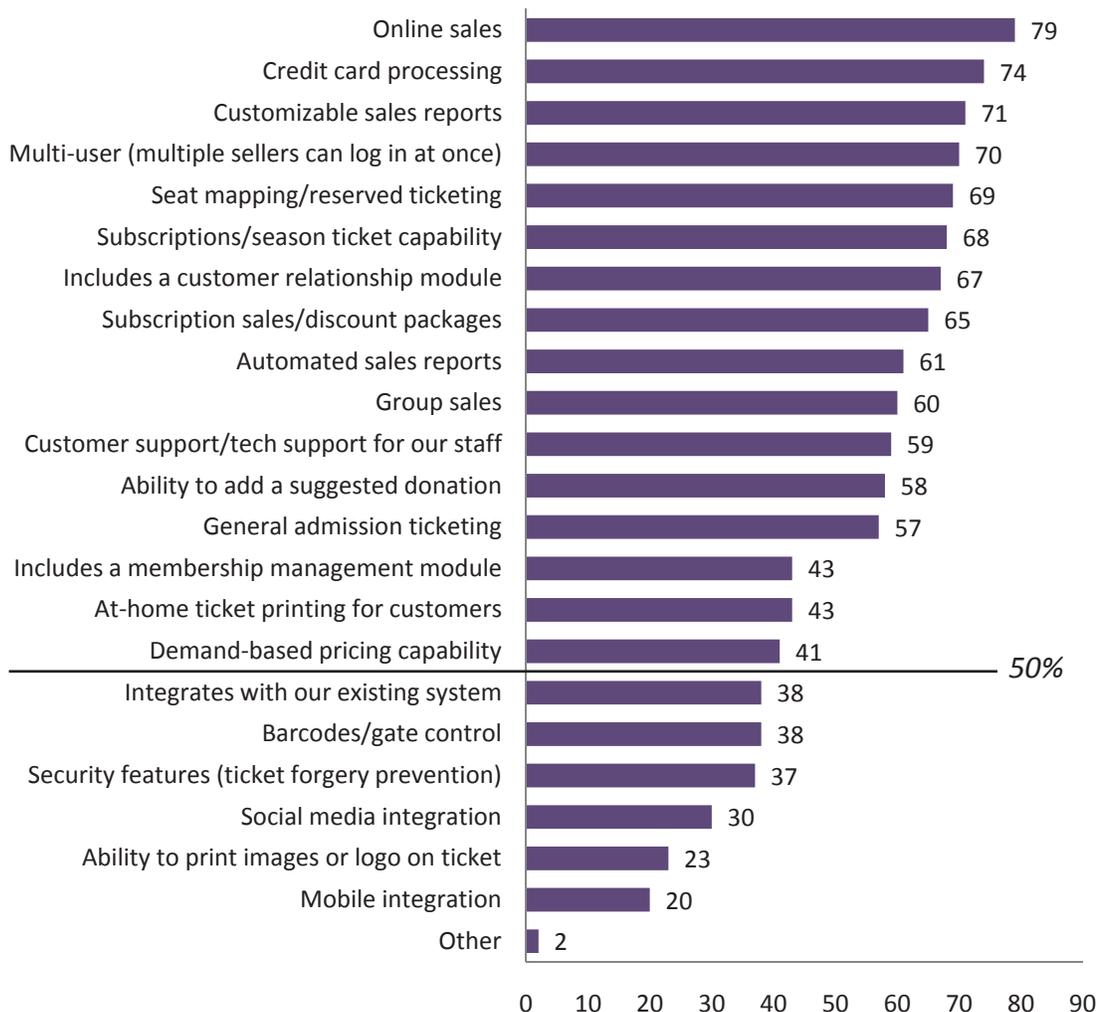
Most frequently selected attributes:
1. Online sales (97%)
2. Credit card processing (91%)
3. Customizable sales reports (87%)
4. Multi-user (86%)
5. Seat mapping / reserved ticketing (85%)

Least selected attributes:
1. Mobile Integration (25%)
2. Ability to print logo or images on ticket (28%)
3. Social media integration (37%)
4. Security features / ticket forgery prevention (46%)
5. Integrates with our existing customer relationship management system (47%)
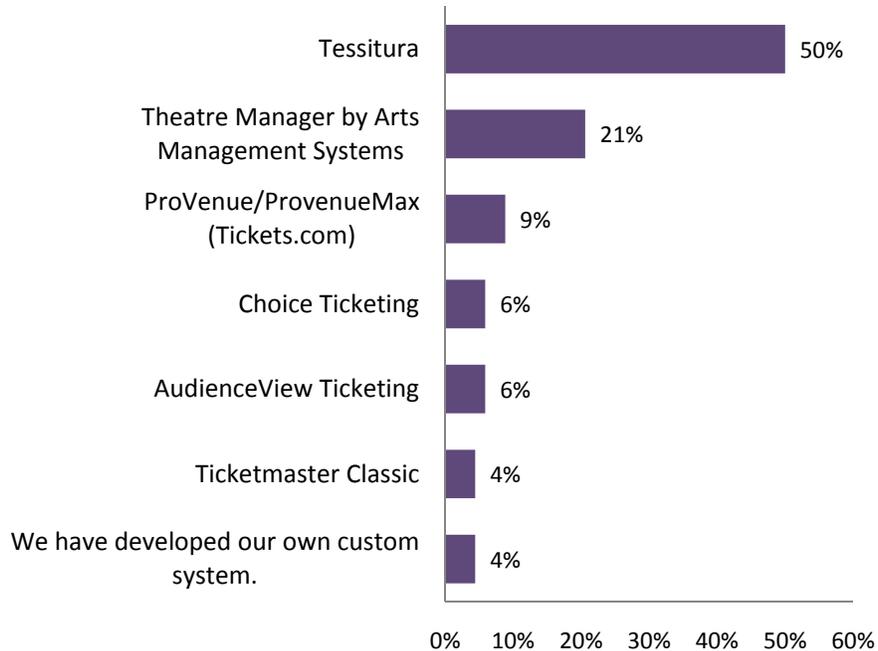
Which of the following functions does your organization consider critical in a box office management system? (select all that apply)

Attribute	Value
Online sales	79
Credit card processing	74
Customizable sales reports	71
Multi-user (multiple sellers can log in at once)	70
Seat mapping/reserved ticketing	69
Subscriptions/season ticket capability	68
Includes a customer relationship module	67
Subscription sales/discount packages	65
Automated sales reports	61
Group sales	60
Customer support/tech support for our staff	59
Ability to add a suggested donation	58
General admission ticketing	57
Includes a membership management module	43
At-home ticket printing for customers	43
Demand-based pricing capability	41
Integrates with our existing system	38
Barcodes/gate control	38
Security features (ticket forgery prevention)	37
Social media integration	30
Ability to print images or logo on ticket	23
Mobile integration	20
Other	2

50%

Software Usage

As in the 2009 survey, users of Tessitura and Theatre Manager comprised just over half of the large organizations in this survey. Three large organizations in this survey described using a custom system.

Which system do you use for internal, online or secondary ticket sales?
("Internal sales" are ticket sales completed by your staff in person, by phone, or by mail.)

System	Percentage
Tessitura	50%
Theatre Manager by Arts Management Systems	21%
ProVenue/ProvenueMax (Tickets.com)	9%
Choice Ticketing	6%
AudienceView Ticketing	6%
Ticketmaster Classic	4%
We have developed our own custom system.	4%

Primary Criteria for Software Choice: Internal System

1. Specific functions and features (48%)
2. Level of customization (36%)
3. Price (30%)
4. Easy to use (27%)
5. Recommendation from colleague (16%)

Large organizations were the most likely of all budget categories to cite a recommendation from a colleague as a criterion for software choice and least likely to cite integration with existing systems.
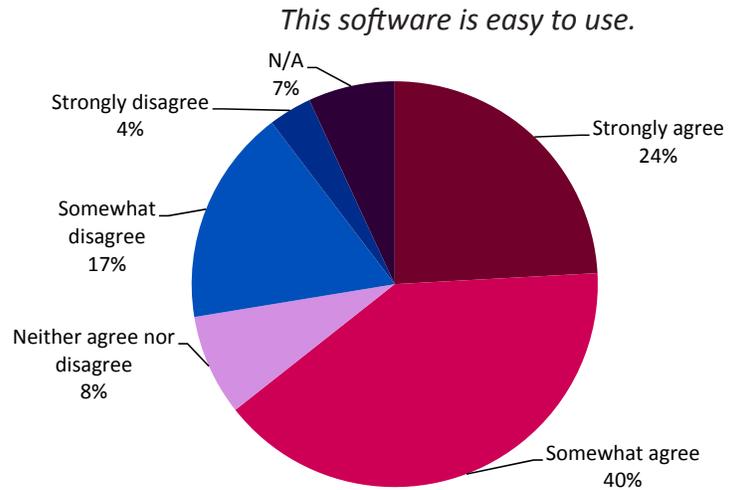
Additional Ticketing Systems

About 5% of large organizations reported using a different system than their internal systems for online sales, most often describing a custom-built system.

*Because respondents do not represent a true cross-section of the arts and culture community, this data cannot be used to infer market share.
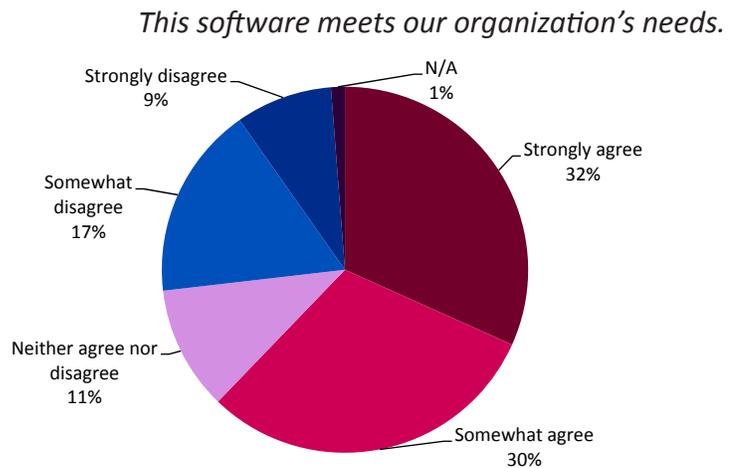
Software Satisfaction

Though over half of large organizations responding to this survey agreed with the qualitative statements below, these organizations were the least likely of any budget category to agree that their system is user friendly or meets their organizational needs.
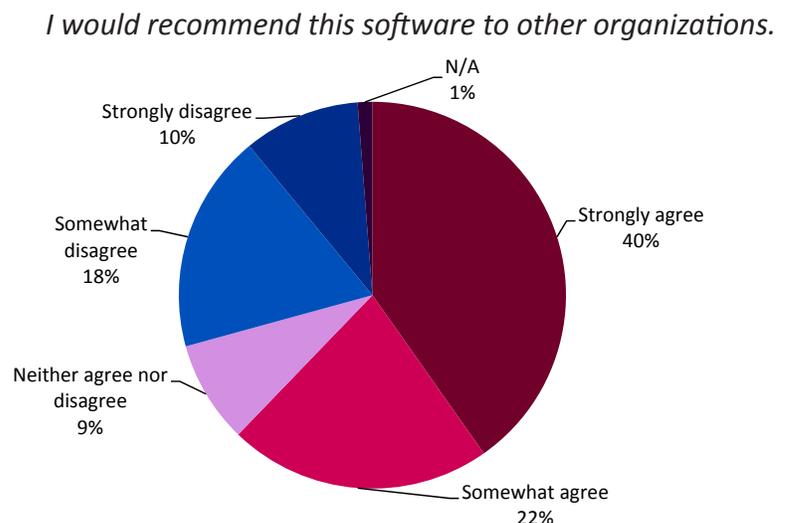
User-friendliness

This software is easy to use.

- N/A 7%
- Strongly disagree 4%
- Somewhat disagree 17%
- Neither agree nor disagree 8%
- Strongly agree 24%
- Somewhat agree 40%

Meeting organizational needs

This software meets our organization's needs.

- Strongly disagree 9%
- N/A 1%
- Somewhat disagree 17%
- Neither agree nor disagree 11%
- Strongly agree 32%
- Somewhat agree 30%

Willingness to recommend

I would recommend this software to other organizations.

- N/A 1%
- Strongly disagree 10%
- Somewhat disagree 18%
- Neither agree nor disagree 9%
- Strongly agree 40%
- Somewhat agree 22%

Very Large Organizations

Annual Budget Size greater than $5 million

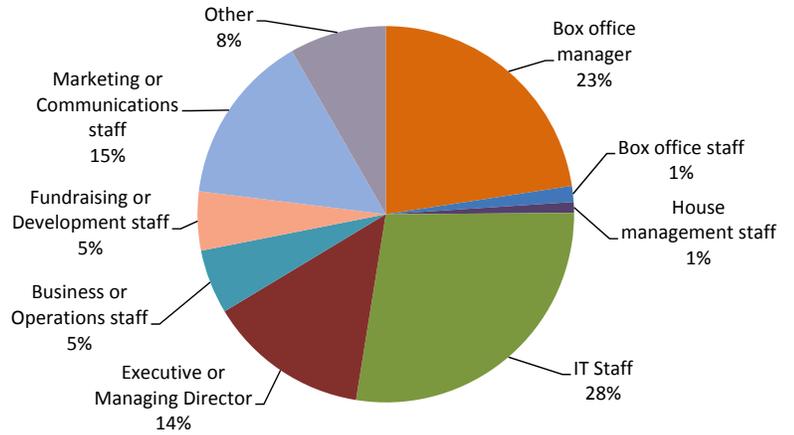Sample Size: 216

Profile of Respondents

Sample size: 216

Job Title

Respondents from very large organizations had a broad range of job titles, with IT staff and Box Office Manager each compromising about 1/4 of respondents. Marketing/ Communication staff and Executive/ Managing Director each comprising about 15% of respondents.

"Other" included positions such as CFO, CIO, General Manager, audience services coordinator, and education program manager.

Which of the following most accurately describes your position?

Other 8%
Marketing or Communications staff 15%
Fundraising or Development staff 5%
Business or Operations staff 5%
Executive or Managing Director 14%
Box office manager 23%
Box office staff 1%
House management staff 1%
IT Staff 28%

Full-Time Staff Size

Over half of very large organizations had 75 or more full-time staff.

How many full-time staff members are employed by your organization?

None 0%
1 or 2 0%
3 to 5 0%
6 to 15 1%
Don't know/not sure 1%
16 to 30 11%
31 to 50 12%
51 to 75 15%
more than 75 60%
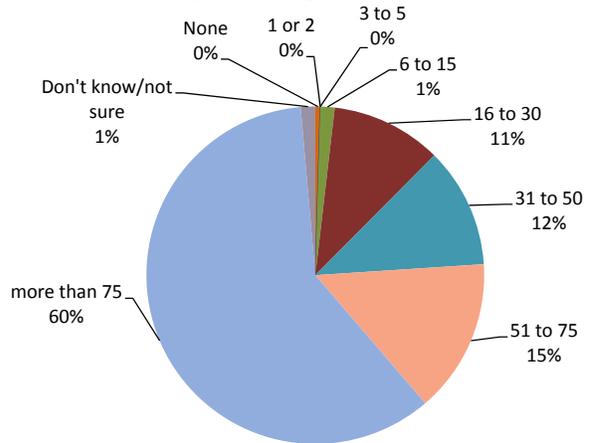
Box Office Staff Size

Approximately 4/5 of very large organizations had at least 6 people working in their box office.

How many people work in your box office(s)?
(Includes full-time employees, part-time employees, and volunteers)

None 0%
1 or 2 3%
Don't know/not sure 6%
3 to 5 11%
More than 30 19%
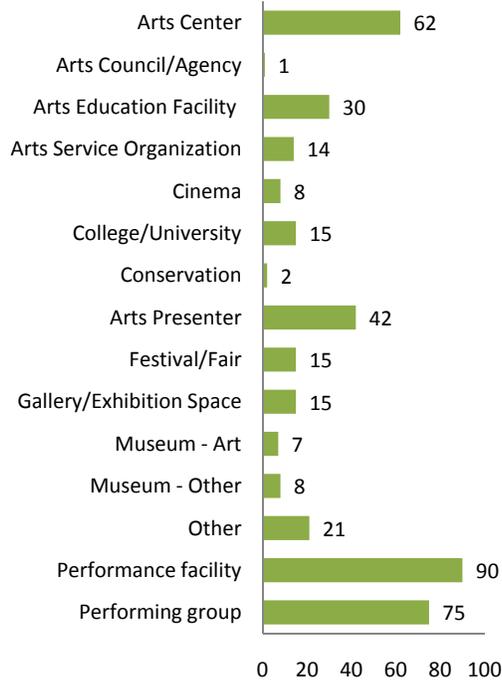16 to 30 17%
6 to 15 44%
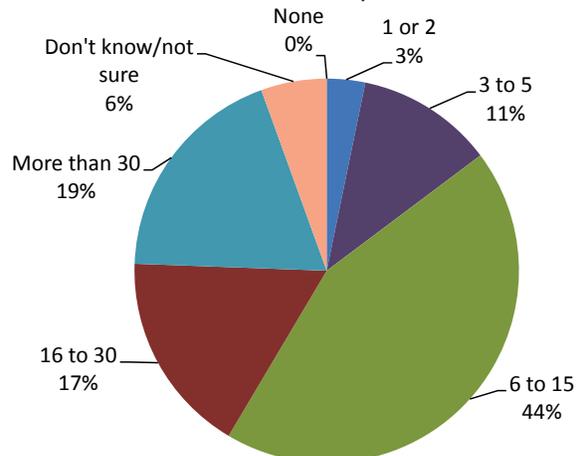
Profile of Respondents
Sample size: 216

Type(s) of Organization

Very large organizations identified themselves as many "other" types of organizations, including science centers, athletics, education and tourism.

Very large organizations were most likely of any budget category to own their own performance space.

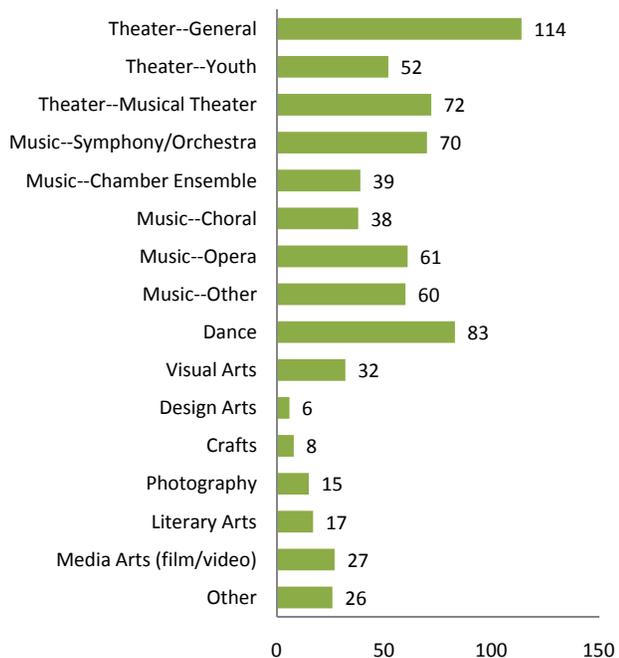*Which of the following best describes your organization? (Choose all that apply)*

Type	Count
Arts Center	62
Arts Council/Agency	1
Arts Education Facility	30
Arts Service Organization	14
Cinema	8
College/University	15
Conservation	2
Arts Presenter	42
Festival/Fair	15
Gallery/Exhibition Space	15
Museum - Art	7
Museum - Other	8
Other	21
Performance facility	90
Performing group	75

Organization Discipline(s)

"Other" disciplines included science, jazz, history, circus/puppetry, education, sports/horse racing, lectures and a combination of disciplines.

Very large organizations were most likely to identify themselves as a non-profit organization, as opposed to a for-profit, government or college/university organization.

Which of the following disciplines represents your organization's focus area? (Choose all that apply)

Discipline	Count
Theater--General	114
Theater--Youth	52
Theater--Musical Theater	72
Music--Symphony/Orchestra	70
Music--Chamber Ensemble	39
Music--Choral	38
Music--Opera	61
Music--Other	60
Dance	83
Visual Arts	32
Design Arts	6
Crafts	8
Photography	15
Literary Arts	17
Media Arts (film/video)	27
Other	26

Ticketing Needs

Critical Attributes

Respondents from very large organizations selected, on average, more critical functions than any other category. The most often indicated "other" attributes included as email automation and complete donation management rather than simple membership management.

As with the other budget categories, credit card processing and online sales were the top two attributes.
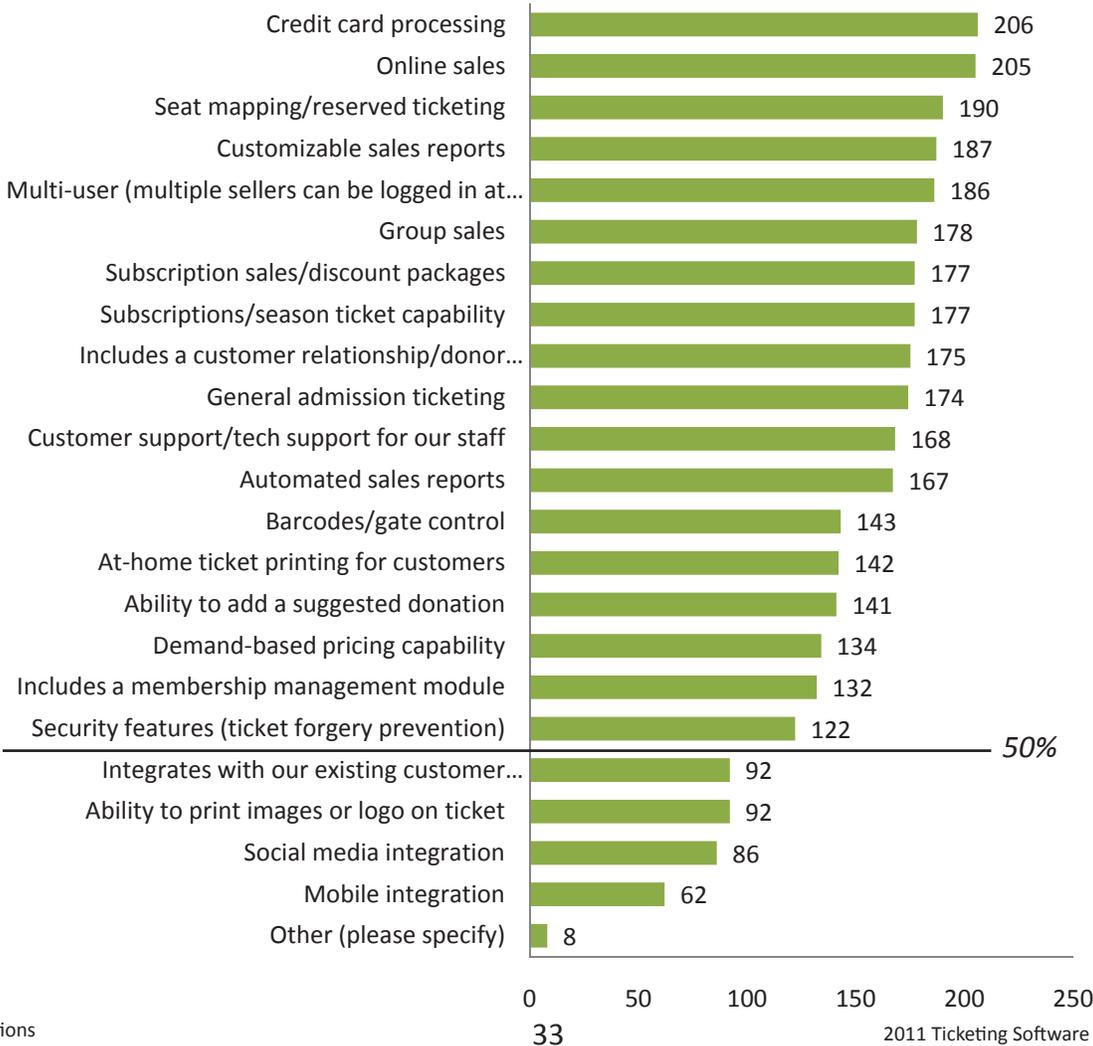
Most frequently selected attributes:
1. Credit card processing (95%)
2. Online sales (95%)
3. Seat mapping / reserved ticketing (88%)
4. Customizable sales reports (87%)
5. Multi-user (86%)

Least selected attributes:
1. Mobile Integration (29%)
2. Social Media Integration (40%)
3. Integrates with our existing customer relationship management system (43%)
4. Ability to print logo or images on ticket (43%)
5. Security features / ticket forgery prevention (57%)

Which of the following functions does your organization consider critical in a box office management system? (select all that apply)

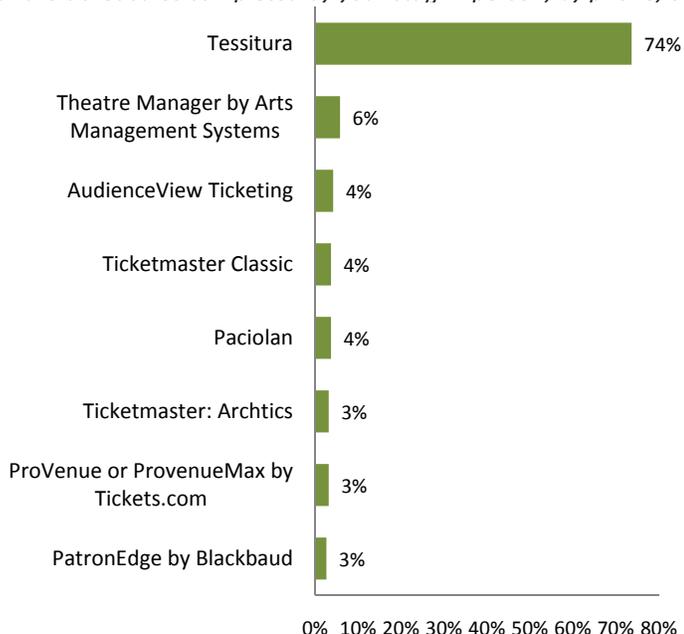| Attribute	Value
Credit card processing	206
Online sales	205
Seat mapping/reserved ticketing	190
Customizable sales reports	187
Multi-user (multiple sellers can be logged in at…	186
Group sales	178
Subscription sales/discount packages	177
Subscriptions/season ticket capability	177
Includes a customer relationship/donor…	175
General admission ticketing	174
Customer support/tech support for our staff	168
Automated sales reports	167
Barcodes/gate control	143
At-home ticket printing for customers	142
Ability to add a suggested donation	141
Demand-based pricing capability	134
Includes a membership management module	132
Security features (ticket forgery prevention)	122
50%	
Integrates with our existing customer…	92
Ability to print images or logo on ticket	92
Social media integration	86
Mobile integration	62
Other (please specify)	8

0   50   100   150   200   250

Software Usage

A vast majority of very large organizations in this survey used Tessitura as their primary internal ticketing tool. Two Ticketmaster products were among the ten most frequently reviewed systems, as well as Paciolan which Ticketmaster recently divested; about 4% of very large organizations in this survey used a Ticketmaster system as their primary system for internal sales.

Very large organizations were the most likely of any budget category to access their internal system (system used by your staff to complete sales in person, by phone, or by mail) through software hosted on the organizations' computers/servers, rather than through an online system.

Which system do you use for internal, online or secondary ticket sales?
("Internal sales" are ticket sales completed by your staff in person, by phone, or by mail.)

System	Percentage
Tessitura	74%
Theatre Manager by Arts Management Systems	6%
AudienceView Ticketing	4%
Ticketmaster Classic	4%
Paciolan	4%
Ticketmaster: Archtics	3%
ProVenue or ProvenueMax by Tickets.com	3%
PatronEdge by Blackbaud	3%

0% 10% 20% 30% 40% 50% 60% 70% 80%

Primary Criteria for Software Choice: Internal System

1. Specific functions & features (52%)
2. Level of customization (46%)
3. Easy to use (29%)
4. Customer service (27%)
5. Price (19%)

Very large organizations were most likely of any budget category to select customization, features and functions, customer service, and integration with existing systems.

Organizations in this budget category were least likely to cite price as a criterion for software choice.

Additional Ticketing Systems

About 2% of very large organizations used a different system than their internal system for online sales, a drop from 7% of respondents last year.

*Because respondents do not represent a true cross-section of the arts and culture community, this data cannot be used to infer market share.
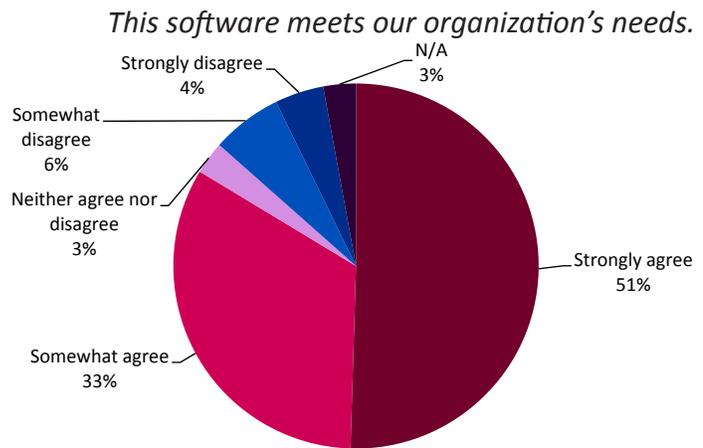
Software Satisfaction

Very large organizations were the most likely of all budget categories to agree that their system met their organizational needs (81%) or that they would recommend their system to other organizations (74%).
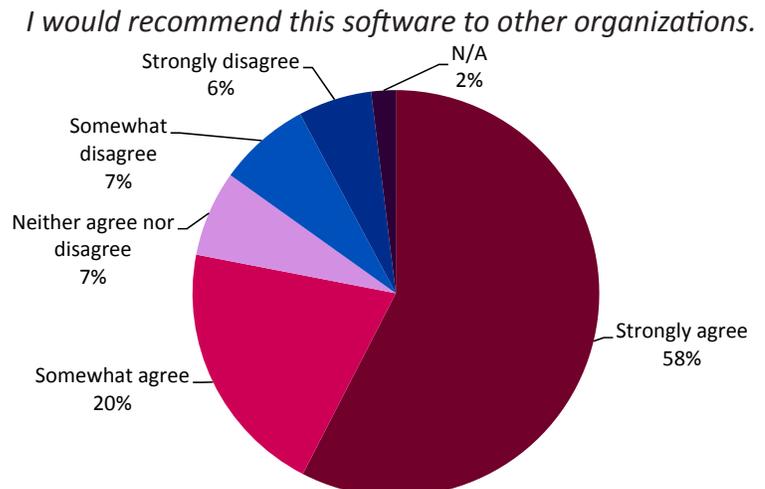
User-friendliness

This software is easy to use.

- Strongly disagree 4%
- Somewhat disagree 9%
- Neither agree nor disagree 10%
- Somewhat agree 42%
- N/A 3%
- Strongly agree 32%

Meeting organizational needs

This software meets our organization's needs.

- Strongly disagree 4%
- Somewhat disagree 6%
- Neither agree nor disagree 3%
- Somewhat agree 33%
- N/A 3%
- Strongly agree 51%

Willingness to recommend

I would recommend this software to other organizations.

- Strongly disagree 6%
- Somewhat disagree 7%
- Neither agree nor disagree 7%
- Somewhat agree 20%
- N/A 2%
- Strongly agree 58%

Choosing A Ticketing System

Choosing a Ticketing System in 5 Easy Steps

1 Determine needs and priorities

Because of the wide range of ticketing solutions available, determining your organization's needs and priorities is the first step to choosing an appropriate software system. In the following pages, we have included a list of subject areas to consider as well as sample questions to ask. It is a good idea to seek input from every department you expect to use the system—not just ticket agents. The following is a list of common needs and priorities:

Specific Needs

- Credit card processing
- Online sales
- Seat mapping/reserved ticketing
- General admission ticketing
- Subscriptions/season ticket capability
- Multi-user (multiple sellers can be logged in at once)
- At-home ticket printing for customers
- Security features (ticket forgery prevention)
- Barcodes/gate control
- Customer support/tech support for our staff
- Subscription sales/discount packages
- Group sales
- Automated sales reports
- Customizable sales reports
- Ability to print images or logo on ticket
- Ability to add a suggested donation
- Integrates with our existing customer relationship/donor management system
- Includes a membership management module
- Includes a customer relationship/donor management module
- Mobile integration
- Social media integration
- Demand-based pricing capability

Organizational Priorities

- Easy to use
- Easy to train staff
- Price
- Level of customization
- Specific functions and features
- Brand recognition
- Recommendation from colleague
- Customer service
- Integration with existing systems
- Required by a venue agreement

2 Identify vendors

Your prioritized list of needs will help you begin to identify systems that are more likely to be a good fit your organization. You might start by looking at the systems commonly used by organizations in your budget category. A list of vendors included in this survey is also available on page 41. Visit their websites and research them to help you narrow your list to a few possibilities.

3 Contact vendors

Once you have narrowed your list to a few possible systems, begin to gather first-hand information from the service providers. In addition to asking some of the questions in the next two pages, you might do the following:

- Ask if there are any hands-on demonstrations that let you experience the system for yourself.
- Request a list of client references in your discipline and budget size, and ask those references about their experiences.
- Request a list of client websites to get an idea of the customer's experience of ticket purchasing and other transactions, such as donating online.

Areas to Consider	Sample questions to ask
Customer/Tech Support	• What type of support is available? (e.g. online, phone, etc) • Is there 24-hour support? If not, what options are available in the event of an after-hours emergency? • What is the average response time to support requests? • Is there a support fee? If so, how much does it cost, and what exactly does it cover?
Data Integration	• Can the system handle both online and internal sales? If not, does the vendor partner with another ticketing software vendor to provide complementary services? • What software does your organization currently use, and what capacity does the ticketing software have to integrate with your current software? • What is the time frame for migrating data from the current system to the new system? • What is the capacity to export data from the system, and in what format can it be exported? (e.g. Excel file, CSV, etc) • Does this system include integrated functions (i.e. donor management, class registration, etc.) that could replace any of your current software? • Does this system have a plug-in to sell tickets on a mobile device or smartphone? • Will this system have the capability to integrate e-mail delivery or social media data?
Data Security	• After a transaction, what data remains in the system, and for how long does it remain? • Are online transactions protected with a data encryption layer? • Is the data being stored with the vendor or with a third-party system like PayPal? • If the data is being stored with the vendor, do you have SAS 70 Compliance/European Safe Compliance?
Infrastructure	• Is the software hosted online, or will your organization need a server to host it? • Is the software compatible with your operating system? (i.e. Windows, MacOS, etc) • Does the system include credit card processing, or will your organization need your own credit card processing software/equipment? • Will the system require your organization to rent or purchase ticket-printing equipment? • If the system uses barcodes, will your organization need to rent or purchase barcode scanners?

Areas to Consider	Sample questions to ask
Price	• What is the set-up fee? • Is there an annual license or maintenance fee? • Are there any additional fees for your organization? (e.g. credit card processing fees, per-ticket fees, customer service etc.) • What fees are charged to the customer? How much control will your organization have over setting those fees?
Reports	• What transactional data do you want to be able to analyze? • What automated reports come with the system? • Can you create custom reports on the fly? • If the vendor will build custom reports for your organization, what is the customization rate and turnaround time? • How does the system track the source of the sale?
Specific Functions	• What specific functions are critical to each user of your ticketing system? (e.g. fast general admission sales, demand pricing, etc.) • What unique aspects of your organization will the system need to handle? (e.g. subscriptions for events in multiple venues, passes for multi-day events, etc) • What are your priorities for online sales? (e.g. at-home ticket printing, customer seat selection, online subscription renewal, etc.)
Staff Access	• How many user accounts do you need? (i.e. How many people should be able to log in to the system at the same time?) • How many user accounts come with the system? • Is it easy to add user accounts if your organization grows? How much do additional accounts cost? • Can you customize the information or functions that individual users are able to access? • What information can you draw from each user account? (e.g. daily sales activity, etc.) • If the software is web-based, can the staff access it from the browsers (and browser versions) currently installed on their computers?
User-Friendliness	• Are there hands-on demonstrations available online? • Are demos available once your data is in the new system in order to train new employees? • How much staff time can you expect to spend setting up events? Selling season tickets? Pulling reports? • How easy is this system for online customers to navigate? • For online purchases, is the system compatible with the last three versions of common Internet browsers (Internet Explorer, Firefox, Safari, Chrome, etc.)?

4 Weighing Your Options and Making a Decision

Revisit your list of priorities and, based on your findings from talking to vendors and organizations who use your system, rank your top choices. You might also seek input again at this point from people who will be using the system to see if your priorities are still in line with theirs.

Keep in mind that price is not always the best indicator of quality. Even if price is your organization's primary concern, it is still worth researching and evaluating other aspects of the system before making your final decision.

5 Prepare for installation

Changing a ticket system is a major organizational change, but it doesn't have to be difficult. Timelines for implementing the new system will vary from organization to organization, but here are some things to consider:

- How long will it take to transfer your data from the current system to the new system?
  - How many years of data do you want to migrate from your current system to the new system?
  - Will the data need to be "cleaned" or modified in any way before transferring it?
- How long will it take to install any software on staff computers?
- How much time will it take to create usernames for staff and adjust their profiles so that they have access to the proper data?
- How long will it take to fully train staff on business-critical functions?
- How close are you to the starting a new season and how long will it take to build a season with the new software?

From these questions, you can determine the best time in your season to install your new system, migrate any data from your current system, and start to train employees. Remember to inform your patrons of any new features that may interest them, like online subscription sales, choose-your-own-seat functions, or mobile integration.

Consortium Ticketing: Questions to ask

Consortium ticketing refers to a system where an umbrella organization manages the system for a number of ticketing clients. Before you choose a ticketing system for a consortium or an organization that may be used in a consortium setting, consider, the following:

Can this system be utilized for consortium ticketing?

What would the structure look like for consortium ticketing? (e.g. sales and data from multiple ticketing clients live in one central database that may be partitioned for privacy purposes OR each ticketing client has their own unique account and the system has added functionality that allows a consortium coordinator to easily access each account)

Are basic changes of contact information (e.g. address updates) immediately available to all ticketing clients in the consortium?

What types of global reports are available to view activity across the consortium?

Software Systems Included in this Survey

Admission - a division of Ticketmaster
ADVANTAGE by Pathfinder
Agile Ticketing
AstorStreet Smartware
AudienceView Ticketing
AuthentiGate
BOW and/or BOW-net by Canadian Theatre Software
BOX, BOX Jr., or Admitix by Box Office Xpress
Boxxo
Brown Paper Tickets
CenterEdge
Choice Ticketing
Click4Tix
ClicknPrint Tickets by Extremetix
Concerto
Enta
eTix
Eventbrite
Eventim InHouse / ShowSoft
Folio Box Office by Martech Systems
Front Gate Solutions
Galaxy by Gateway Ticketing Systems
Glitner Ticketing
HandyTix
In Ticketing
InstantSeats
InterTicket
iseats
JetTicket Professional
La Billetterie
MidWestTIX
MIVA
New Concept Software
New Era Tickets
Omniticket
OvationTix by TheaterMania
Paciolan
Patron Technology
PatronBase
PatronEdge by Blackbaud
PrintTix USA
ProVenue or ProvenueMax by Tickets.com
Quantix

Radiant
Red Truck Tickets
Réseau Ovation
RTS - Ready Theater Systems
SABO by Seat Advisor
Savoy Systems
ShoWare by VisionOne, Inc
ShowClix
Shubert Ticketing
Siriusware
Smart Ticketing Solutions
Smarttix
Spektrix
Tessitura
Theatre Manager by Arts Management Systems
Thundertix
Ticket Force
Ticket Turtle: Basic, Premier, or Pro
TicketBiscuit
TicketFusion
TicketLeap
TicketmakerVantix (ATMS)
Ticketmaster Classic
Ticketmaster: Archtics
Ticketmaster: Vista
TICKETsage
TicketSoft
TicketSolve
TicketsWest
TicketU
Ticketweb
Tick-It! Trak Pro and/or Tick-It! 2K+
Titan Technology Group
Tix.com
tix/SYS
TixHub
Toptix
Total Info by Easy-Ware
TyTix
UniversityTickets
Vendini: TicketAgent or TicketLine
Veritix
WebTix and/or WinTix by Center Stage Software