



# Community Update #2

Aug.18, 2025



**“Chautauqua...is a place for families where the whole family may fulfill each [their] own desires and interests and yet all can be together.”**

**Eleanor Roosevelt  
1930 radio interview from Chautauqua**

# 2025 Season Performance Update

|                                      |   |
|--------------------------------------|---|
| <b>Program:</b>                      | <p>We are receiving positive feedback on the quality of programming this summer and great early feedback on the 2026 program plan</p> <ul style="list-style-type: none"><li>○ Three sold-out shows in a row</li><li>○ No major operational interruptions or challenges</li><li>○ Innovation is yielding positive results (Special Studies, Kwame Alexander week, Chautauqua Visual Arts Residencies, Opera model shift)</li></ul>   |
| <b>Guest Experience &amp; Sales:</b> | <p>Our Net Promoter Scores (NPS) to-date reflect some of the <b>highest-ever levels of satisfaction</b> with the service experience</p> <ul style="list-style-type: none"><li>○ Improved satisfaction with Institution food &amp; beverage offerings and venues</li><li>○ Technology upgrades and operational shifts have streamlined how patrons interact with staff. For example, the strong demand for digital tickets has resulted in 86% of all 2025 orders being fulfilled digitally.</li></ul> <p>Patrons are increasingly likely to refer Chautauqua to friends and family</p> <ul style="list-style-type: none"><li>○ 70% of our patrons first heard about Chautauqua from someone else. This is why patron experience remains of primary importance to our growth strategy.</li></ul> |
| <b>Bright spots in Sales:</b>        | <p>Athenaeum Hotel/Food &amp; Beverage, Single Tickets, Youth Programs and Special Studies (including Master Classes)</p>   |

# 2025 Season Performance Update

## Attendance:

Our long-term attendance will not meet our projections for growth over 2024, reflecting **the first year since the pandemic that we have not grown** attendance.

- Projected attendance of overnight or longer patrons will be down 13% from our high point in 2019.
- Single ticket sales are strong, buoyed by 3-4 sold-out events.
- We expect the financial impact of this to be approx. \$850K this year

Are we experiencing a “new normal” in terms of post-pandemic attendance?

- The decline is around 190 people per day since 2019 (i.e. not a dramatic decline. This is recoverable.)

## Philanthropy:

Annual giving in 2025 reflects strong upward momentum, marked by increased donor engagement, increased gifts, and the return of lapsed supporters, demonstrating renewed confidence across the donor base.

- Some gains are tied to exceptional, one-time contributions,
- Focus on relationship development and stewardship

## As a Reminder: The Imperative

*We need to recalibrate Chautauqua's financial framework*

1. Focus on the Nine-Week Summer Assembly
2. Invest approximately \$4.2M in annual capital preservation, funded by annual earned and contributed revenue
3. Maintain adequate cash balance
4. Position Chautauqua to attract and retain the best talent, including our next president

Decisions will be made following thoughtful, detailed analysis of data and community and staff input.

# Updated: Three areas of expense and revenue loss reduction

## Personnel

Personnel Expense Reductions

**\$2.5 - \$3 M**

From:

- Retirements
- Unfilled positions
- Staff reductions and area reorganizations

## Operations

Non-direct program-related expense/loss reductions

**\$1- \$2.0 M**

From:

- Reduce staff housing use
- Eliminate Grounds Access Pass (GAP)
- Rethink or eliminate services and initiatives to achieve break-even performance
- Close D.C. office
- Improve Hotel financial performance

## Programming

Modifications within “Four Pillars”; Investments aligned with demand and philanthropic funding

**\$1 M**

From:

- Reduce investments in targeted areas
- Solicit endowment/annual philanthropy to support

## Short-Term Strategic Areas of Priority

1. Narrow our focus to the Nine-Week Summer Assembly with few exceptions
  - Shoulder Season Work – Mostly Hotel Conferences, Groups and Weddings
  - Proven initiatives (Chautauqua Travels)
  - Right-size selected budgets (*The Daily*, CHQ Assembly)
2. Further Enhance Patron Experience
  - The greatest short-term growth potential lies in reducing the 78% churn rate among new patrons and activating infrequent visitors — 20% attend every other year, 20% come two years in a row, 15% convert into returning Chautauquans, while the rest lapse or attend only once every three or four years.
3. Solve for housing
  - Between 2015 and 2025, the rental capacity declined 15% with 27% fewer units available for rent.
  - Move more staff to off-grounds housing to free-up accommodations for patrons and test hypothesis that this is limiting attendance growth
  - Longer term: Create new patron housing (condo-style)

## Improve Net Operating Performance by \$4-6 Million: Status Report

- The target remains \$4-6 million.
- There is support for discontinuing the Grounds Access Pass (GAP) and the decision to discontinue the Washington, D.C. Office.
- We hear that you want us to continue to publish the print edition of *The Chautauquan Daily*. Expect subscription and ad rates to increase.
- We have received overwhelming feedback that IDEA remains a priority; philanthropic funding has been pledged.
  - This is a matter of:
    - Mission
    - Morals and Values
    - Business Needs
      - A fair number of people would not be here had it not been for accessibility upgrades, for example
      - Brand issue for talent and some patrons



## Improve Net Operating Performance by \$4-6 Million: Status Report

- We are receiving positive response to requests for support of specific programs, specifically for CSO endowments and scholarship support
- We hear your concern for maintaining investments in things that prioritize the future of Chautauqua, including initiatives for younger patrons and families.
- There is general support for reducing the discount on the season pass.
  - Note: Need to correct statement that was in in *The Daily*:  
We are NOT going from 50% discount to 30% for season passes.  
Size of discount reduction has not been decided.

## Next Steps

We have focused on community engagement, communication, and dialogue. That has helped us to shape strategy and planning. (Thank you!)

We are turning our focus to engaging a broader range of staff more deeply in re-imagining the organization and operations.

- We can't achieve our goal of improved net operating performance by cuts alone.
  - Where are there opportunities to combine operations to reduce redundancy and enhance guest experience?
  - What can we stop doing or do differently?
  - What can we pause for a year or two as we focus on top priorities?
  - Where can earned revenue potential be enhanced?

## Next Steps: Timeline

- **Board of Trustees has its quarterly meeting August 23**
  - Preliminary report on Summer Assembly performance and outcomes
  - Updated data and analysis
  - Update on decisions made and on-deck
- **Broader/Deeper Staff Engagement – August 18 - September 5**
- **Board of Trustees Special Meeting - September 13**
- **2026 Budget Presented for Preliminary Review – November 7**
- **2026 Final Budget Approved by Board - Mid-December**
- **Future Community Updates- Early October  
Mid November  
Mid December**

# How Can You Help Chautauqua?



Donate annually to the Chautauqua Fund – unrestricted gifts provide the most flexibility to direct funds to the areas of greatest need.

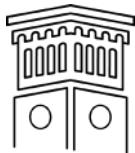
<https://giving.chq.org>



Give to an existing endowment or create one of your own – a forever gift to ensure that Chautauqua and the programs that are meaningful to you and your family continue to thrive for generations



Consider a multi-year pledge to an area or initiative that you love (e.g., CSO, Theater, Popular Entertainment, Religion, CHQ Assembly)



Support the iconic buildings that are cornerstones of the Chautauqua experience (e.g., Athenaeum Hotel, Smith Memorial Library)

**Contact the Office of Advancement:**  
**[advancement@chq.org](mailto:advancement@chq.org) or 716.357.6404**



# Questions and Conversation