

TRG's Arts and Culture Benchmark Holiday & Year-End Edition Looking Back to Succeed Going Forward



January 29, 2025



League
of American
Orchestras



Eric Nelson
VP, Global Partnerships
TRG Arts



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VP, Knowledge, Learning & Leadership
League of American Orchestras



2024

2025



We want to hear from you!

Put in the chat:

What is one challenge you hope to address with the insights shared during this webinar?



Agenda

- Welcome
- Data Dive: 2024 Engagement Review
- Questions & Conversation

Who are TRG Arts?

Through tailored consulting, teaching, and data-driven insights, we help organizations optimize their business models and audience engagement strategies.



Arts & Culture Benchmark

Real-time intelligence on the impact of our changing world. Understand how your ticketing data compares to an industry leading benchmark of over 400 organizations across North America, the UK, and Ireland.

Login Now to See Your Data

Join the Free Benchmark



This project is supported in part by the National Endowment for the Arts through our partnership with SMU DataArts.

statista

- 1) 500 organizations in U.K., Ireland, U.S., and Canada**
- 2) 250 in the North America (NA)**
 - 47 Orchestras**
- 3) 400 Million Transactions**

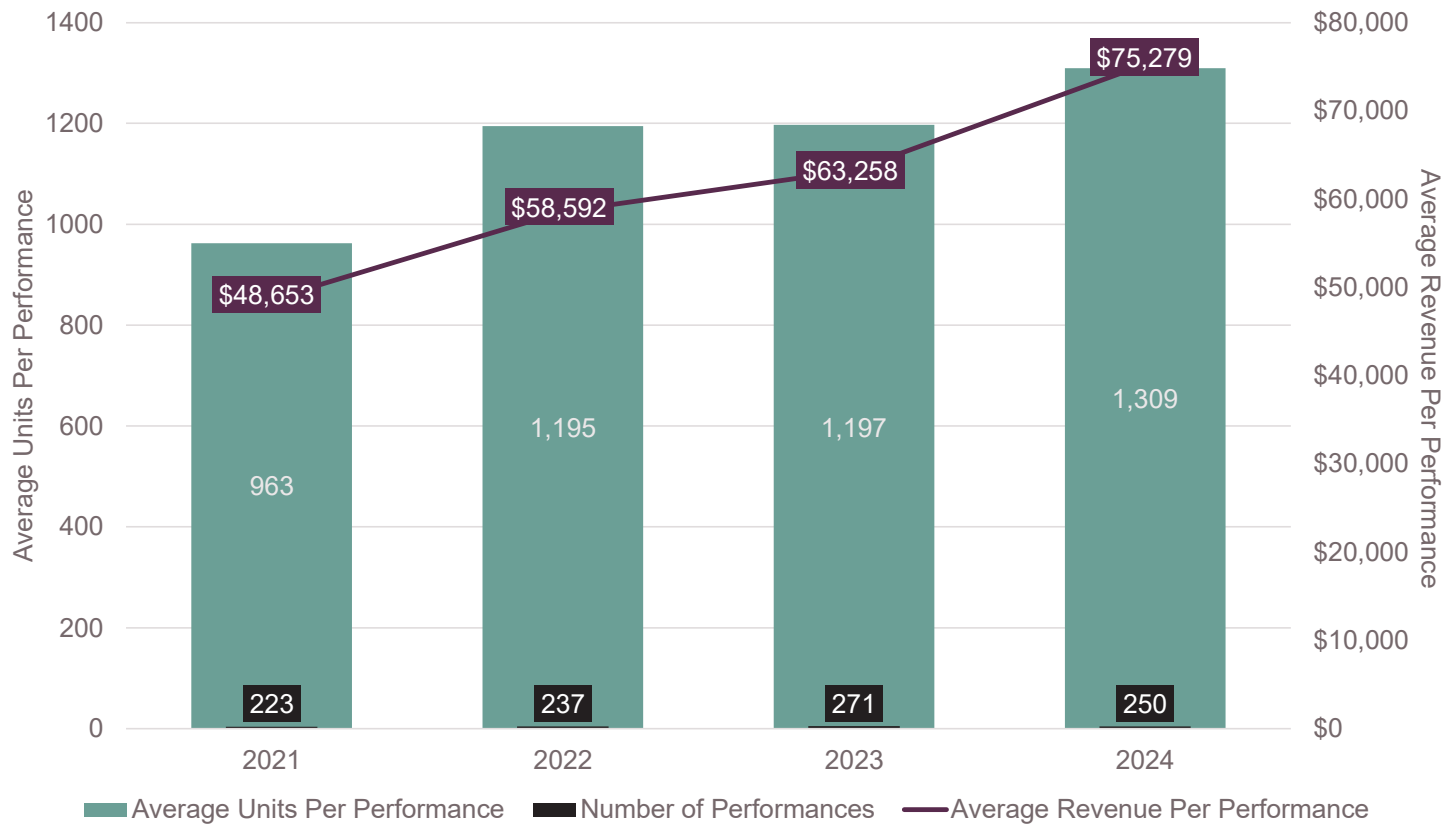
Benchmark Details

Holiday



Orchestras: Holiday

2024: Late Thanksgiving = Less Possible Performance Dates



2024 vs 2023

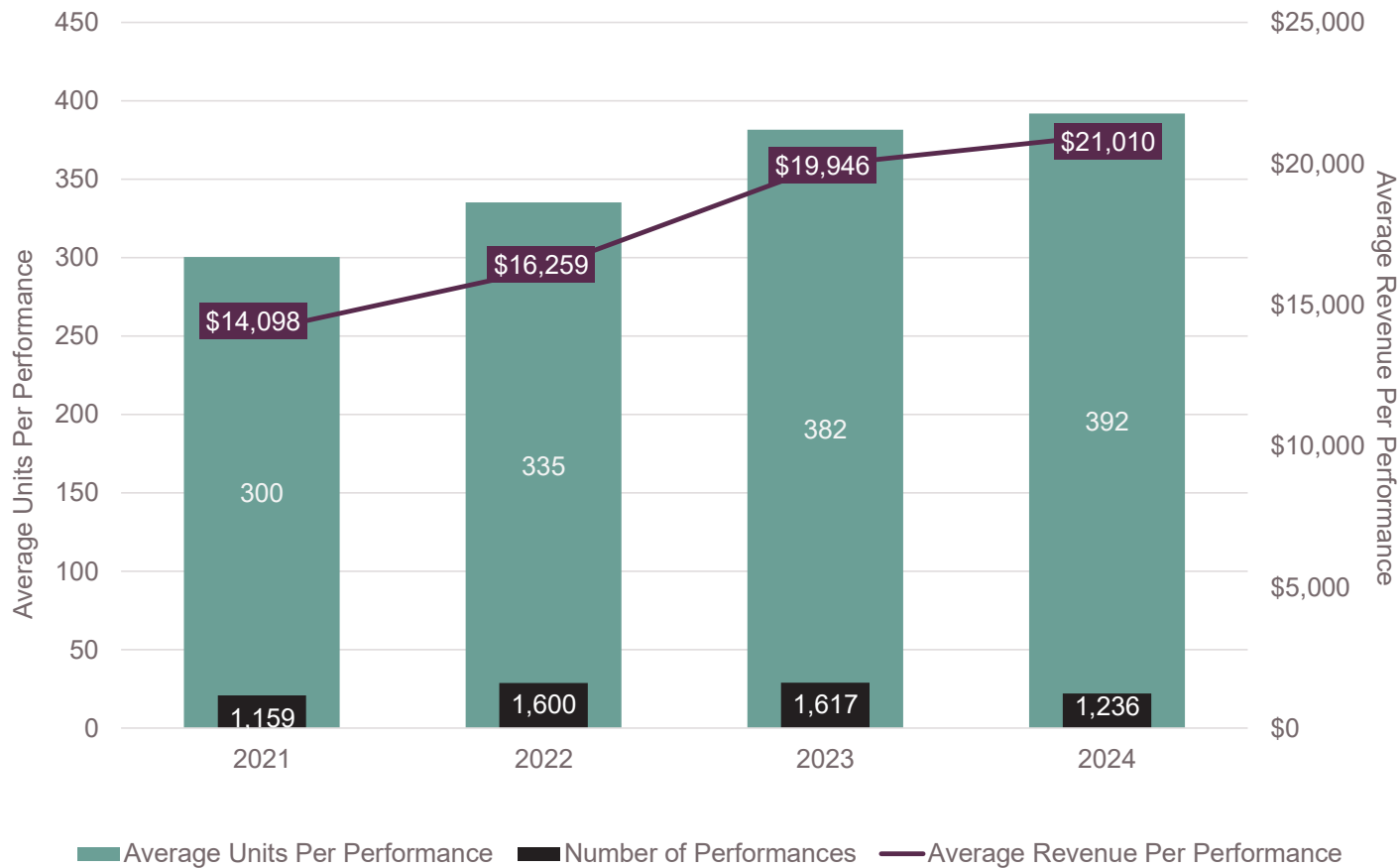
9%
Increase in
Avg Units

19%
Increase in
Avg Revenue

-8%
Decrease in
Perf

Theatres: Holiday

2024: Late Thanksgiving = Less Possible Performance Dates



2024 vs 2023

3%
Increase in
Avg Units

5%
Increase in
Avg Revenue

-23%
Decrease in
Perf

Orchestras: Holiday

Average Ticket Price



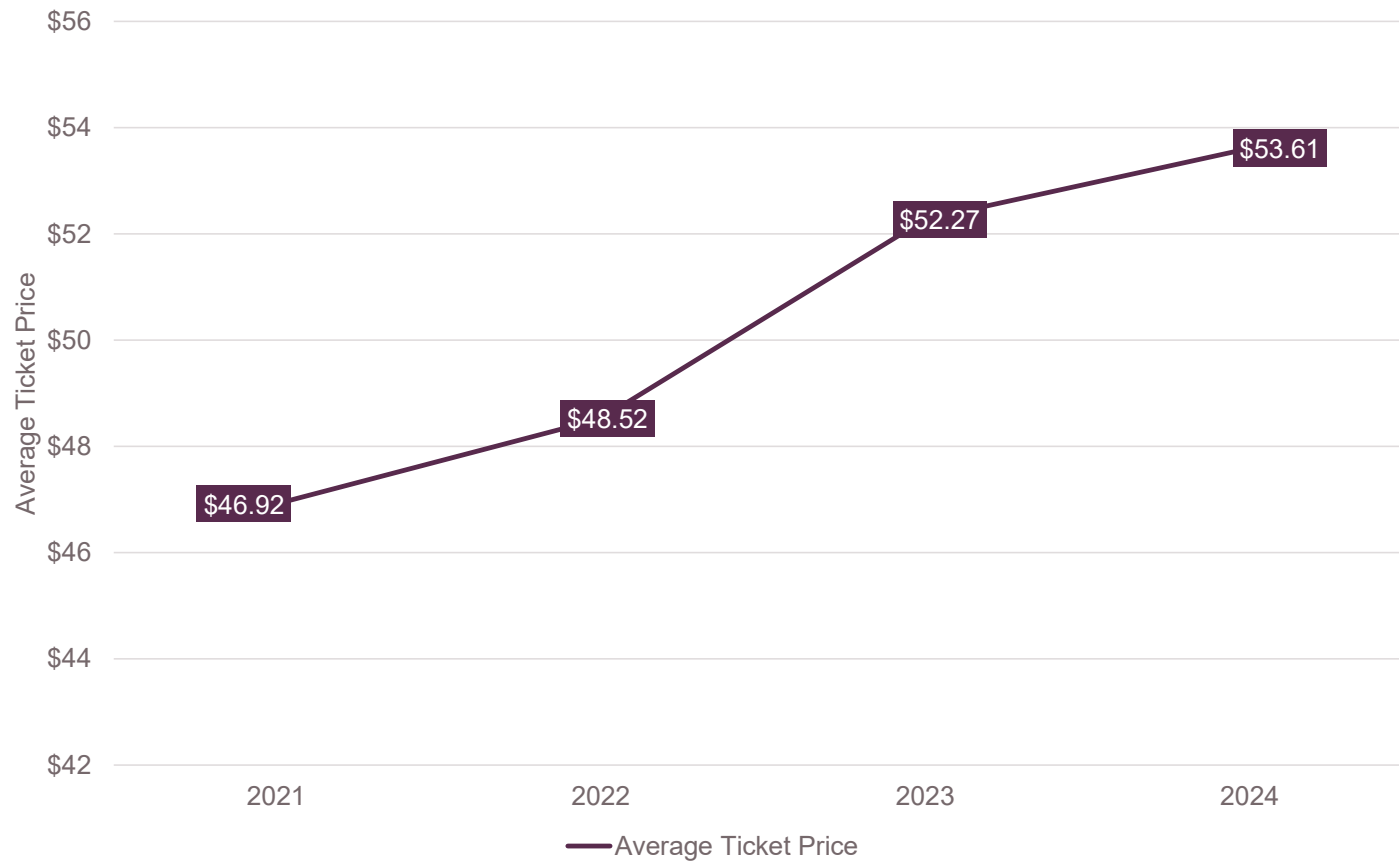
2024 vs 2023

9%

**Increase in
Average Ticket
Price**

Theatres: Holiday

Average Ticket Price



2024 vs 2023

3%

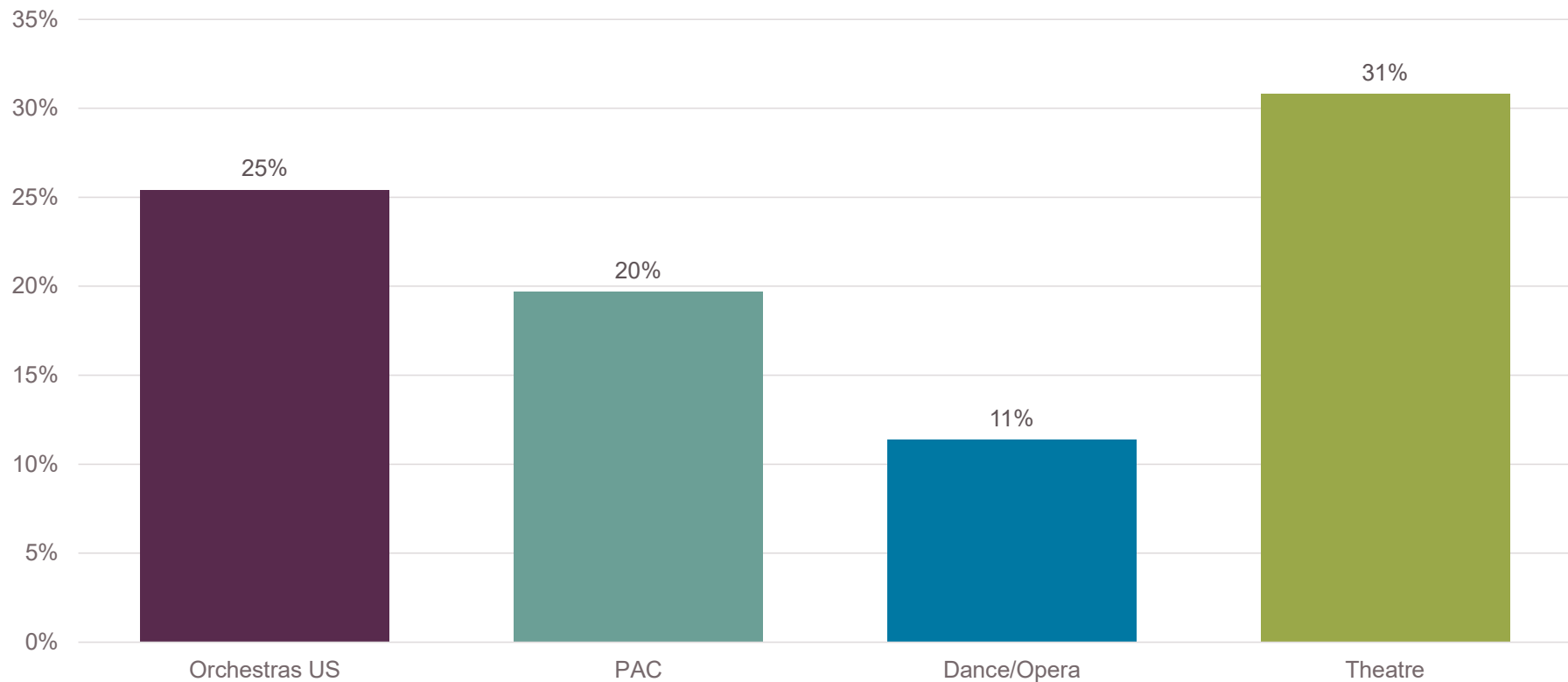
Increase in
Average Ticket
Price

Performing Arts Sector Trends

Single Ticket Revenue Change: US Performing Arts Orgs

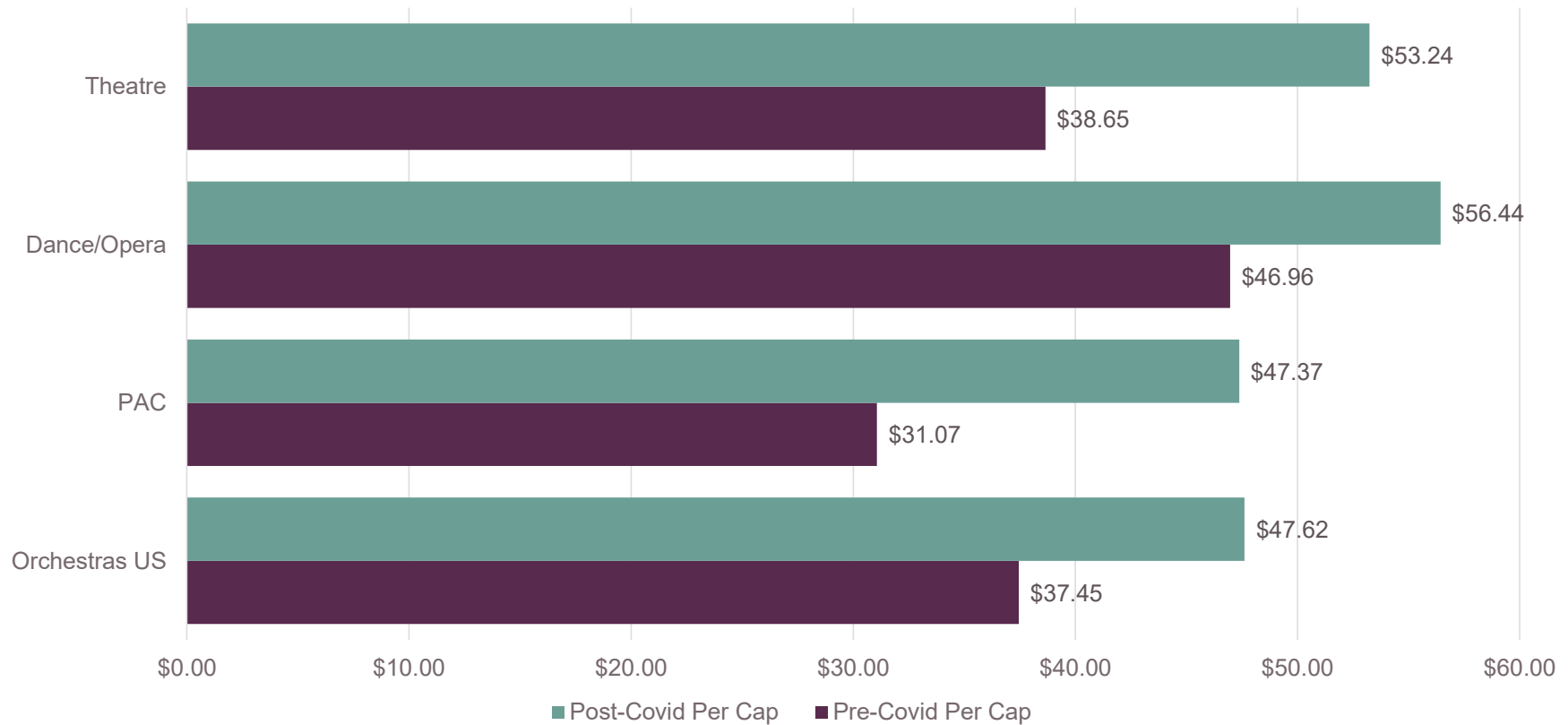
Calendar Year 2019 vs 2024

In Q3 – Orchs 27%, PACs 17%, Dance/Operas 12%, Theatres 30%



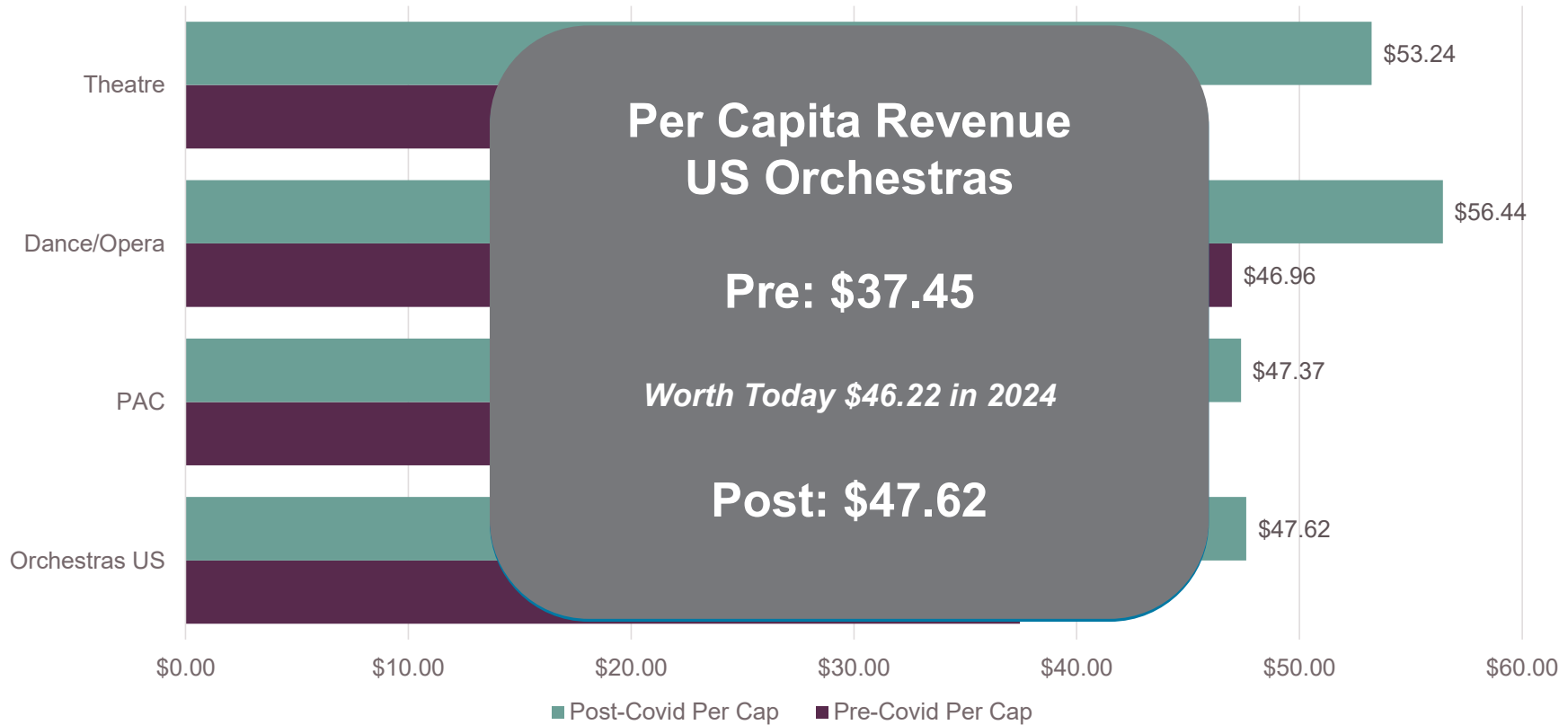
Single Ticket Per Capita Rev: US Performing Arts Orgs

2019 vs 2024



Single Ticket Per Capita Rev: US Performing Arts Orgs

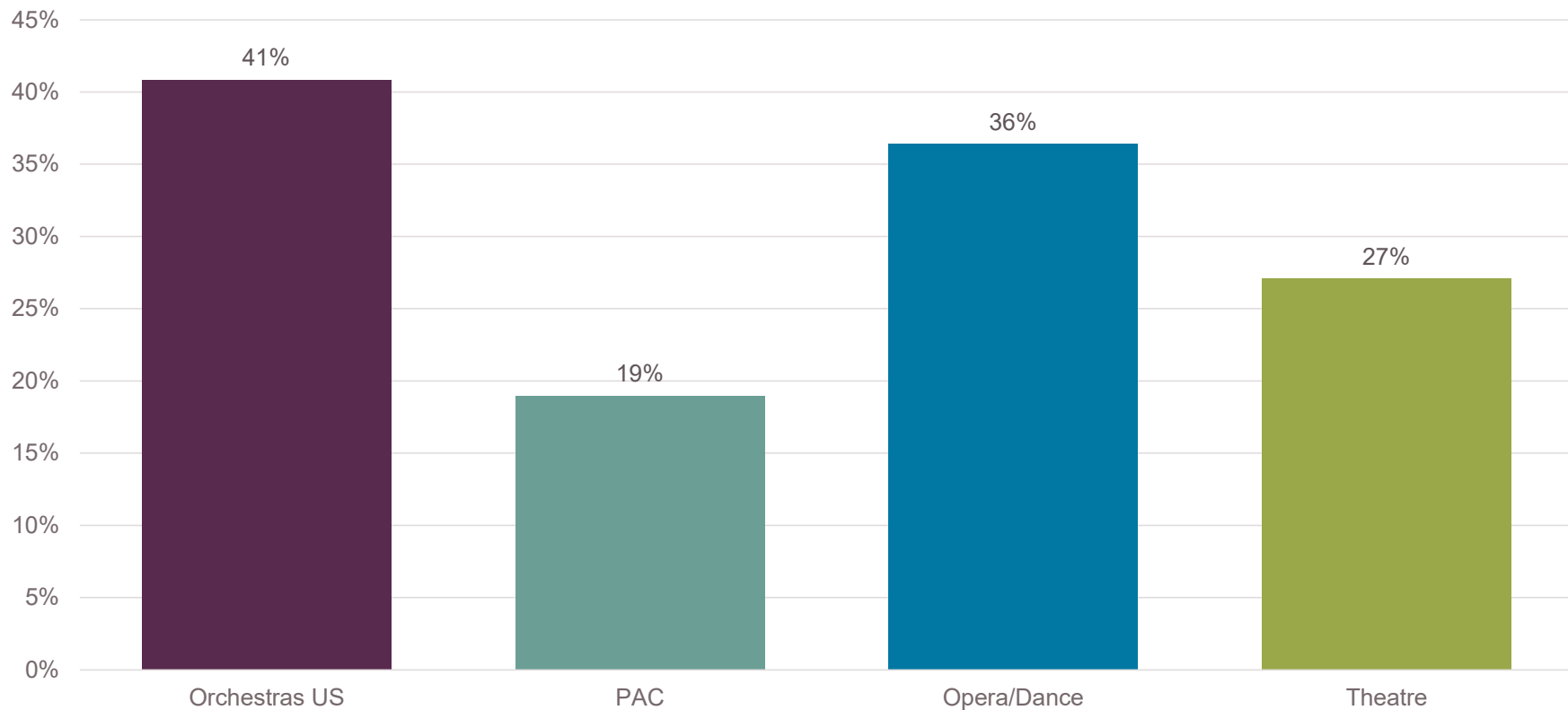
2019 vs 2024



Subscription and Membership Revenue Change US Performing Arts Orgs

Calendar Year 2019 vs 2024

In Q3 – Orchs 40%, PACs 67%, Dance/Operas 37%, Theatres 26%



What is Driving Subscription and Membership Resurgence?

Per Unit, Per Capita is up 25% for US Performing Arts Organizations

Per Unit Per Cap

+25%

\$66 vs \$53

*(Adjusted for inflation,
\$53 in 2019 is \$65.03
in 2024)*

What is Driving Subscription and Membership Resurgence?

Per Unit, Per Capita is up 28% for US Orchestras

Per Unit Per Cap

+28%

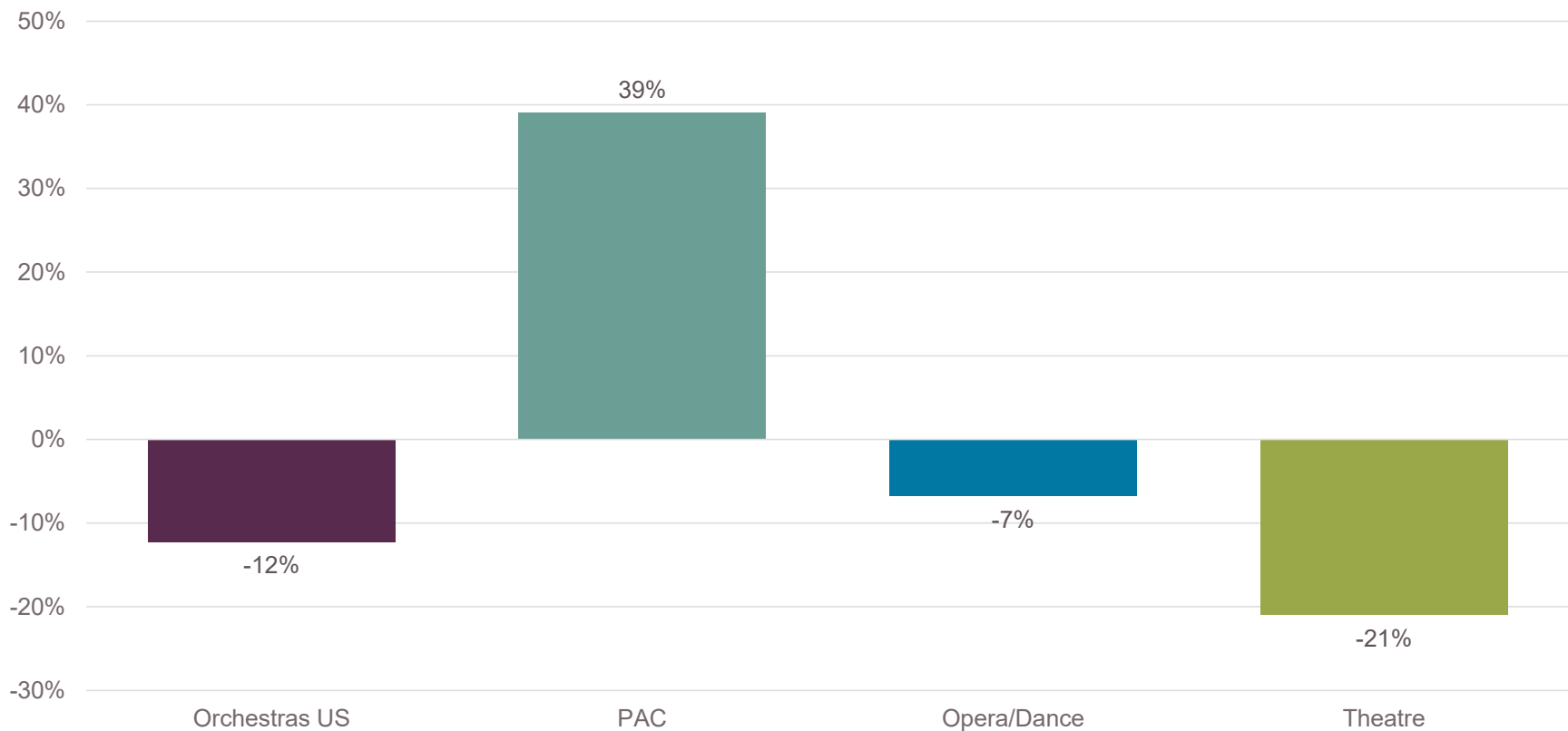
\$64 vs \$50

*(Adjusted for inflation,
\$50 in 2019 is \$61.35
in 2024)*

Donation Revenue Change: US Performing Arts Orgs

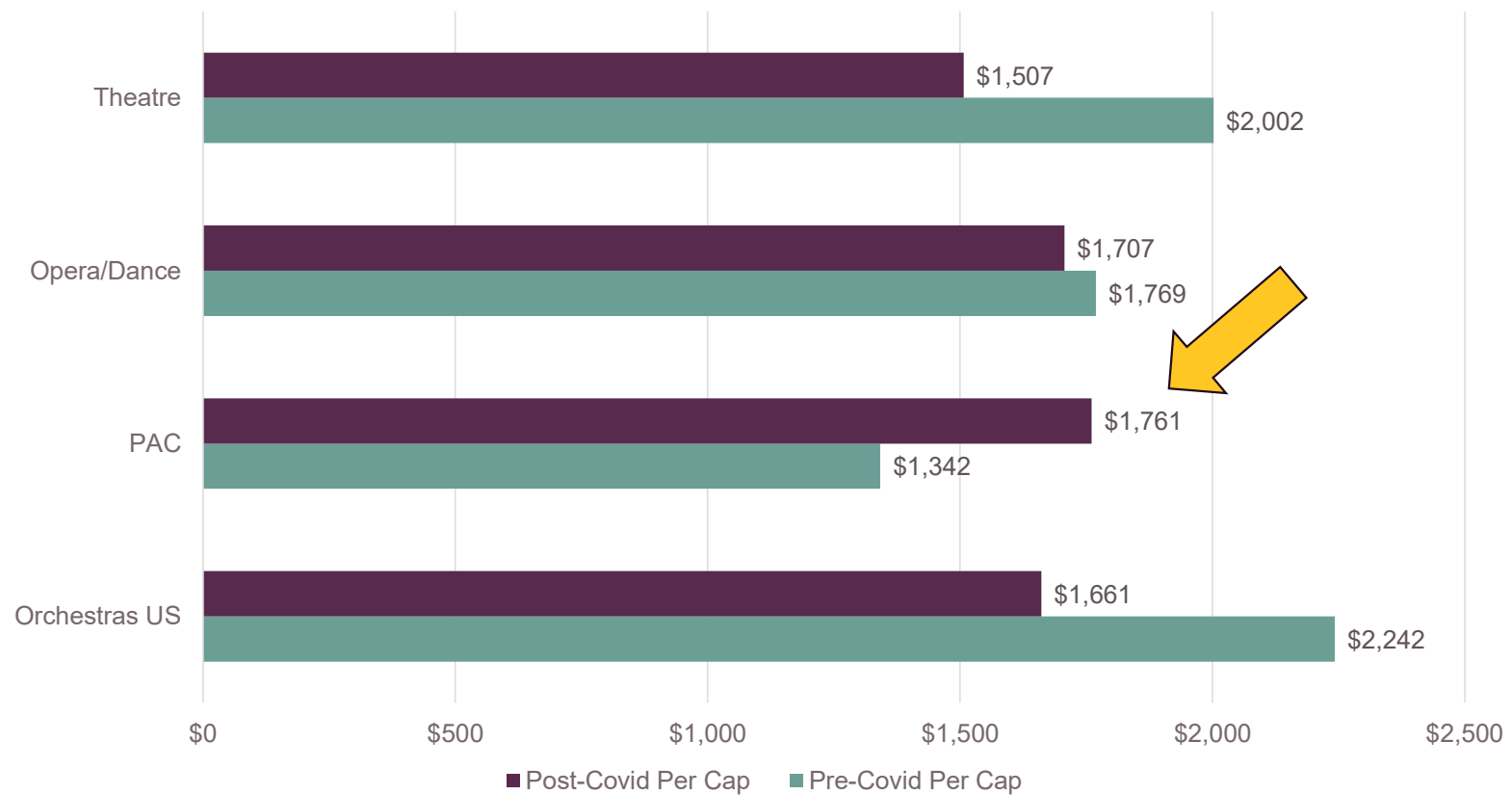
Calendar Year 2019 vs 2024

In Q3 – Orchs -1%, PACs 49%, Dance/Operas -5%, Theatres 2%



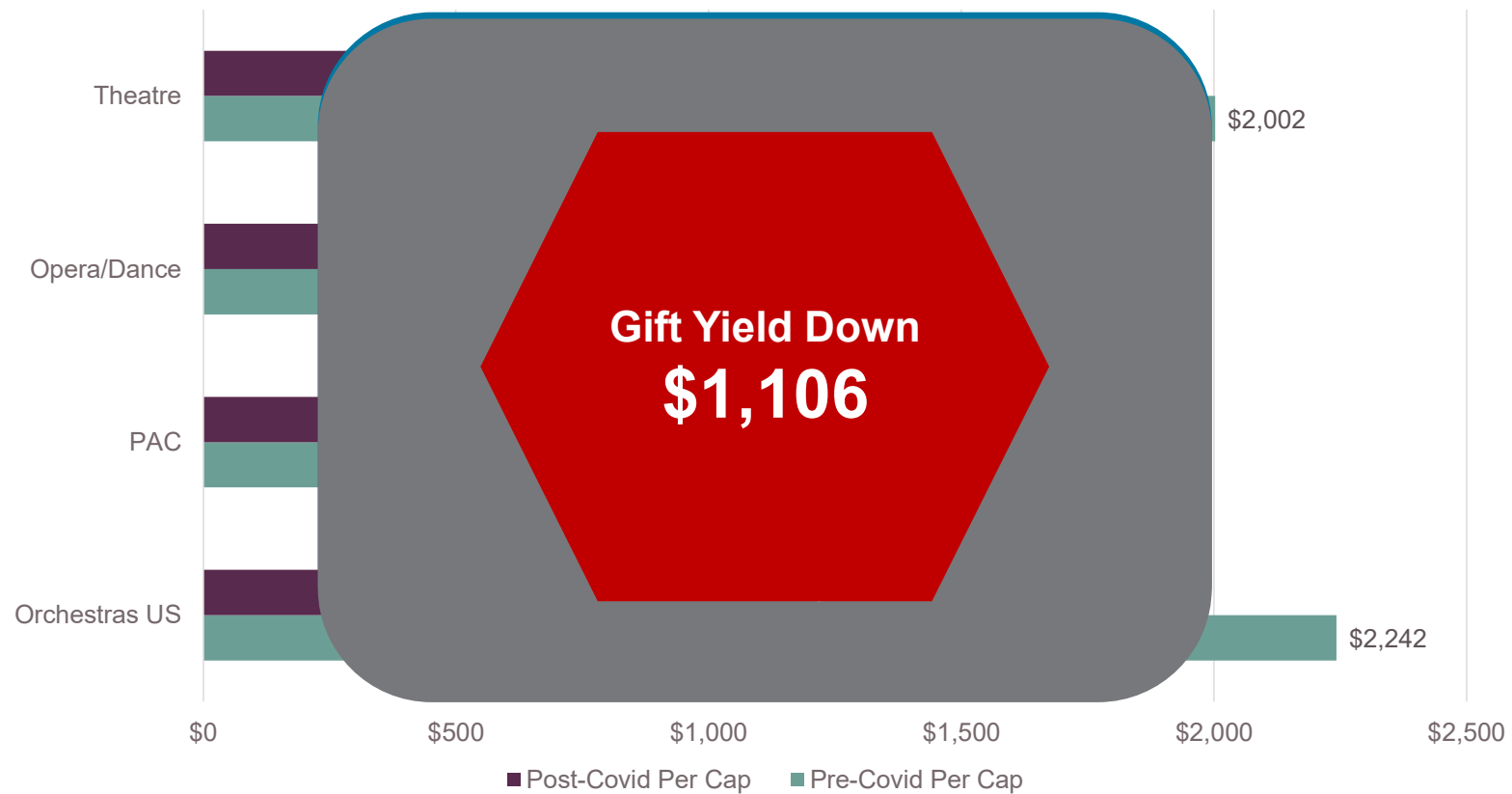
Ave. Gift Revenue: US Performing Arts Orgs

2019 vs 2024, PACs Recovering Fastest



Ave. Gift Revenue: US Performing Arts Orgs

2019 vs 2024, PACs Recovering Fastest



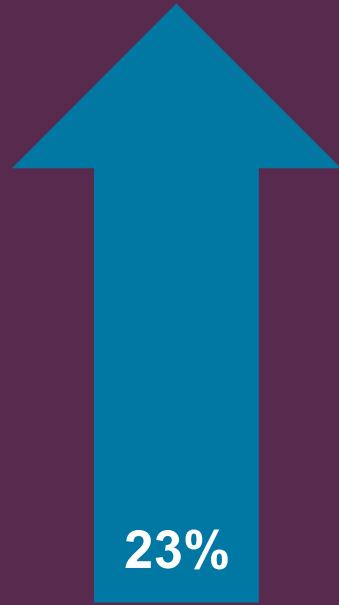
Orchestras Ticket Sales

Single Ticket Sales: US Performing Arts Organizations

2019 vs 2024

Revenue
\$823M vs \$671M

Units
16.5M vs 15.7M



Revenue



Units

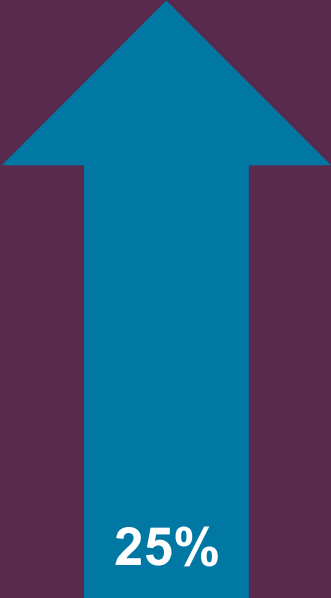


Single Ticket Sales: US Orchestras

2019 vs 2024

Revenue
\$227M vs \$181M

Units
4.83M vs 3.97M



Revenue

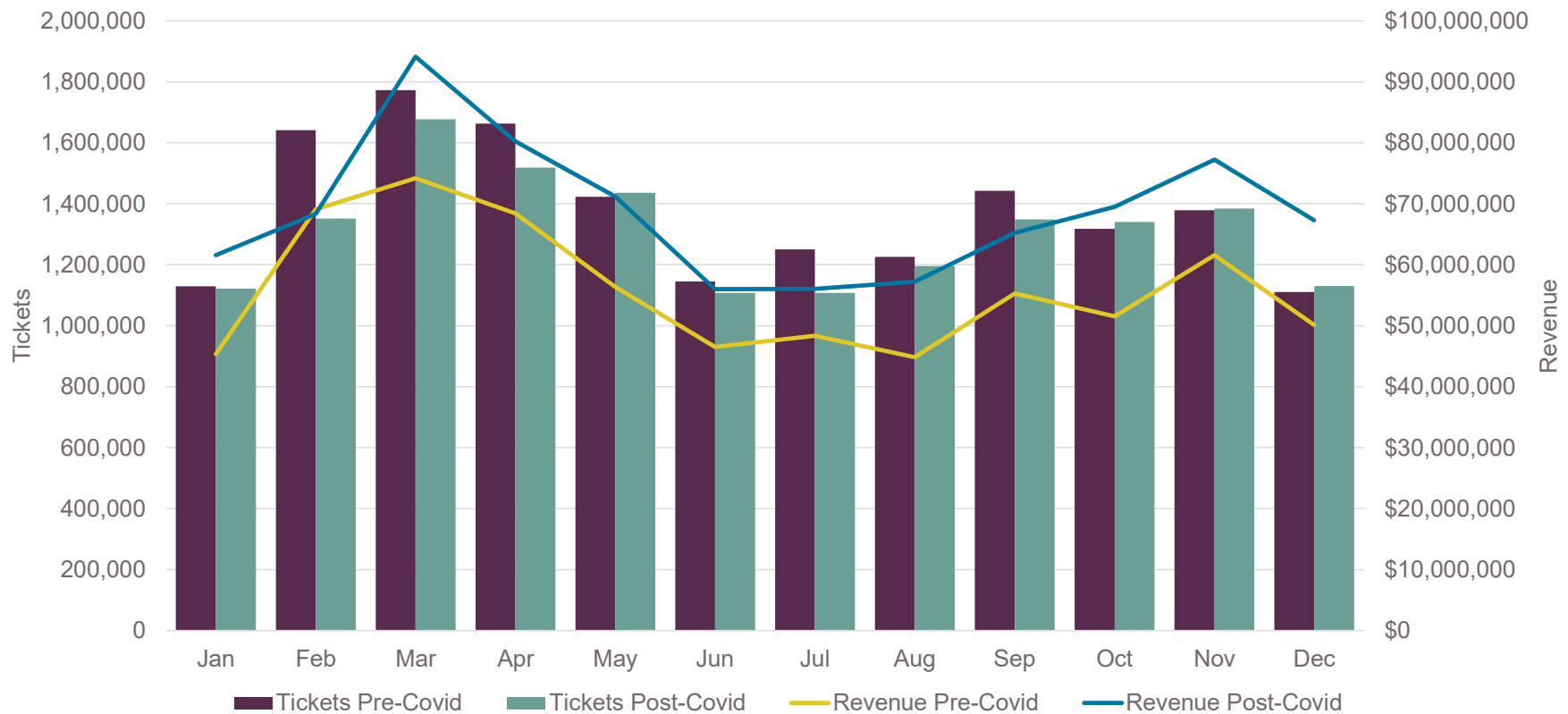


Units



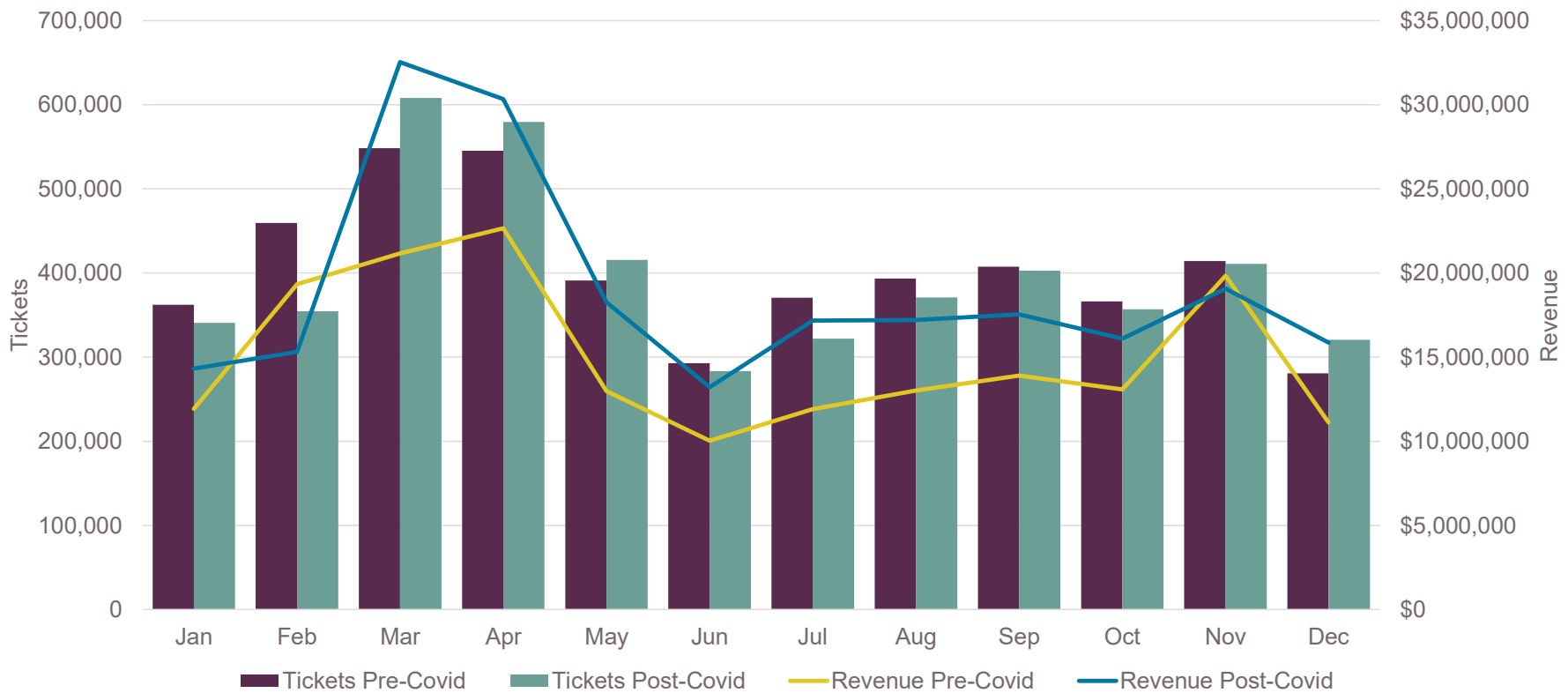
Single Tickets: US Performing Arts Organizations

2019 vs 2024



Single Tickets: US Orchestras

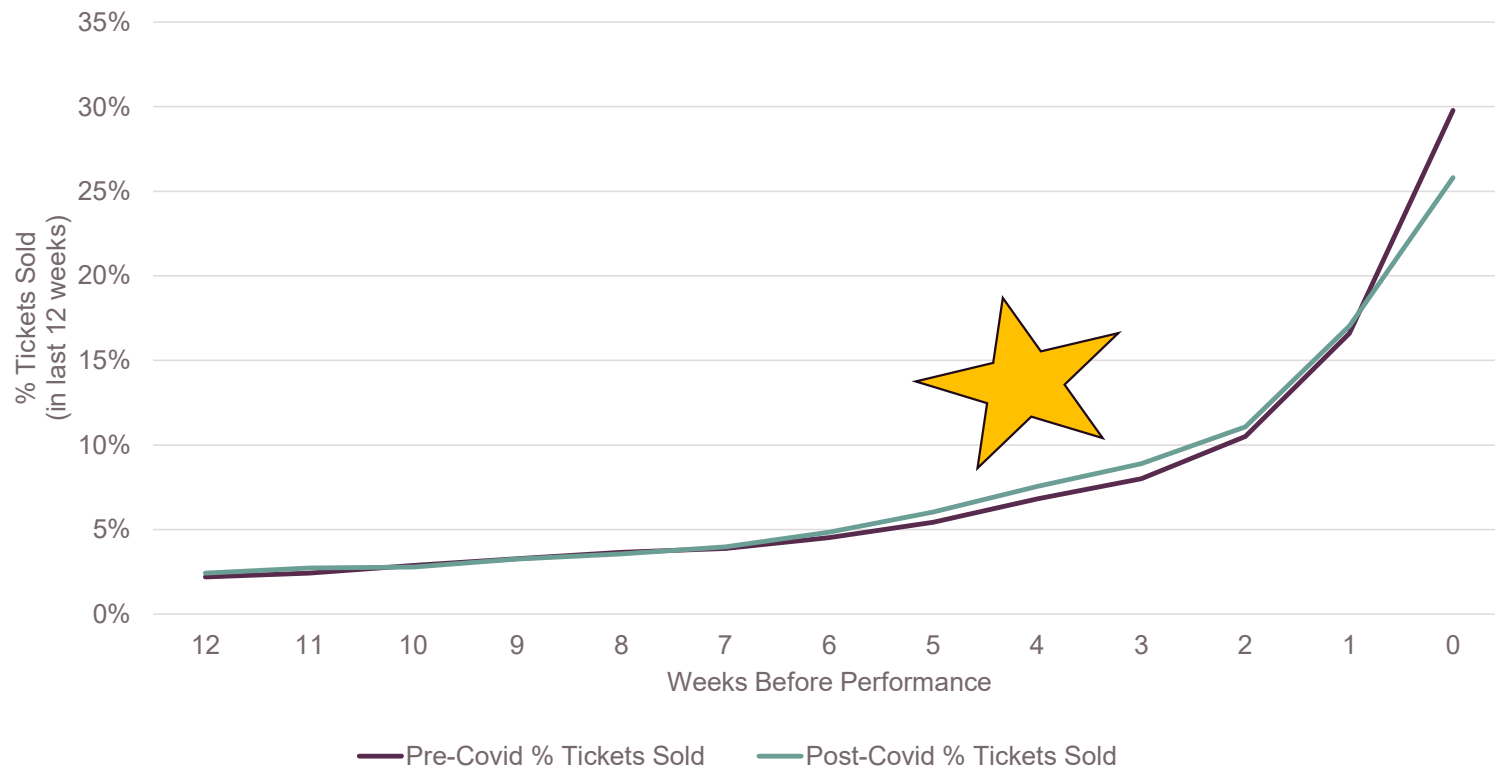
2019 vs 2024





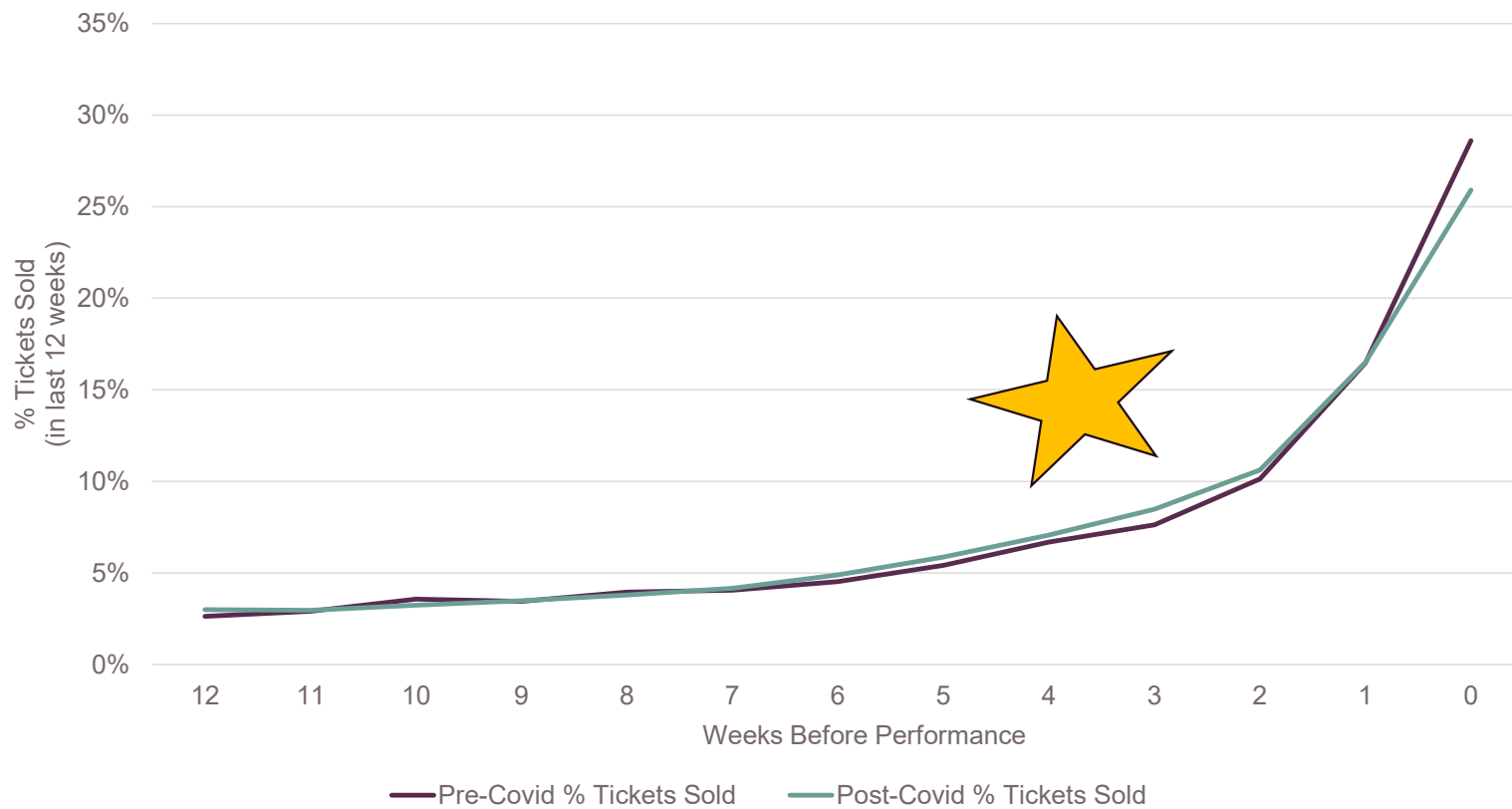
Single Tickets: US Performing Arts Organizations

Weeks Out - 2019 vs 2024



Single Tickets: US Orchestras

Week Out - 2019 vs 2024



Subscription and Membership Sales: US Performing Arts Organizations 2019 vs 2024

Revenue
\$152M vs \$112M

Units
2.30M vs 2.13M

35%

Revenue

8%

Units
(Not Packages)



Subscription and Membership Sales: US Orchestras 2019 vs 2024

Revenue
\$63.6M vs \$45.2M

Units
993K vs 906K

41%

Revenue

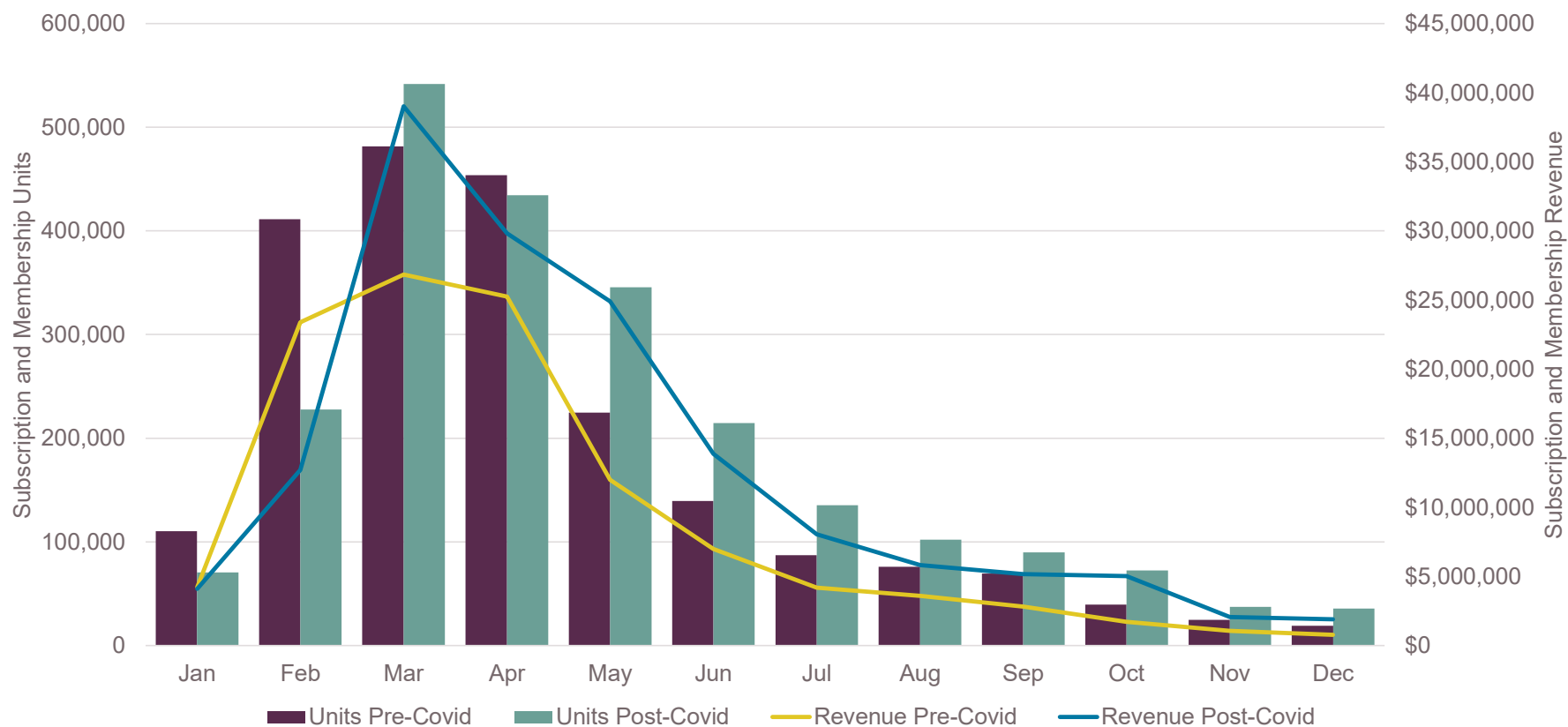
10%

Units
(Not Packages)



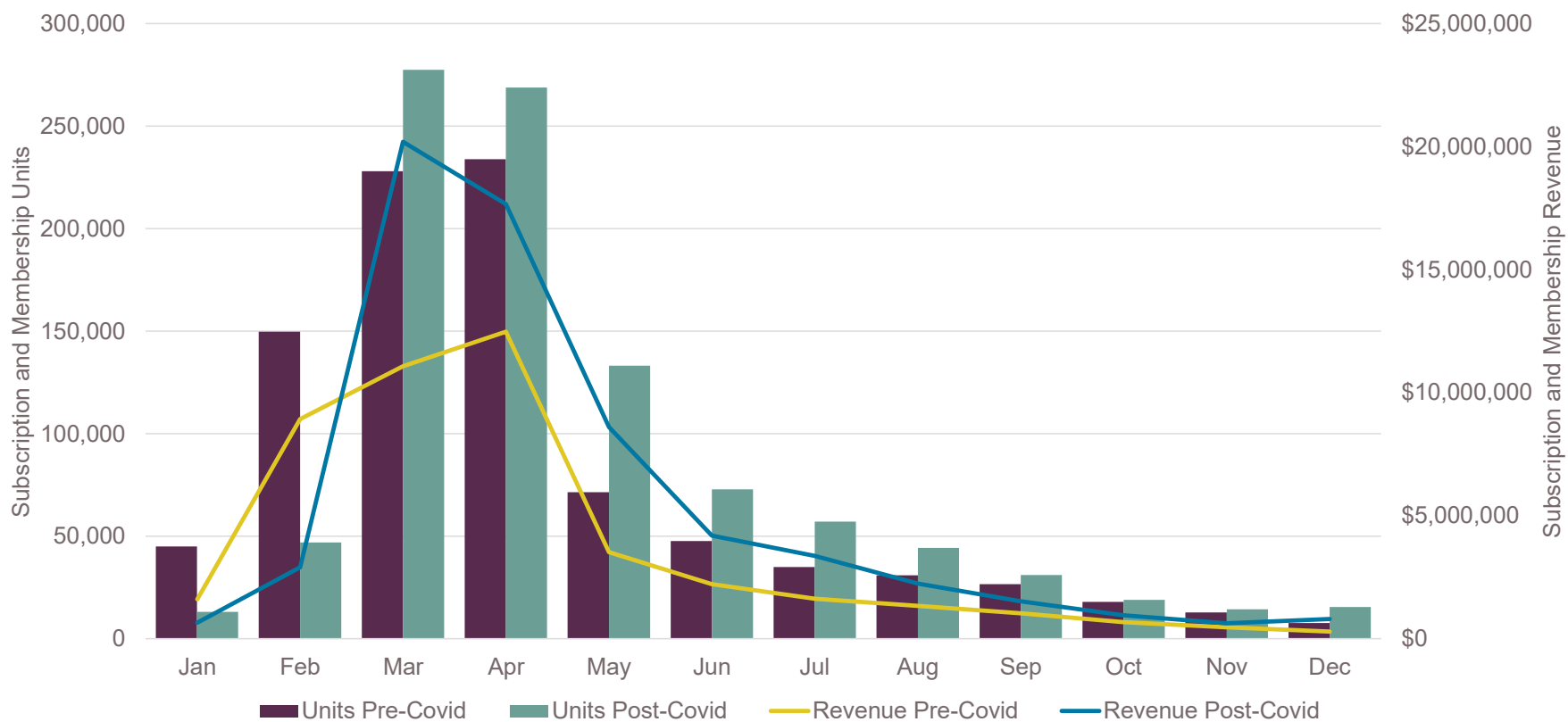
Subscription and Membership: US Performing Arts Organizations

2019 vs 2024



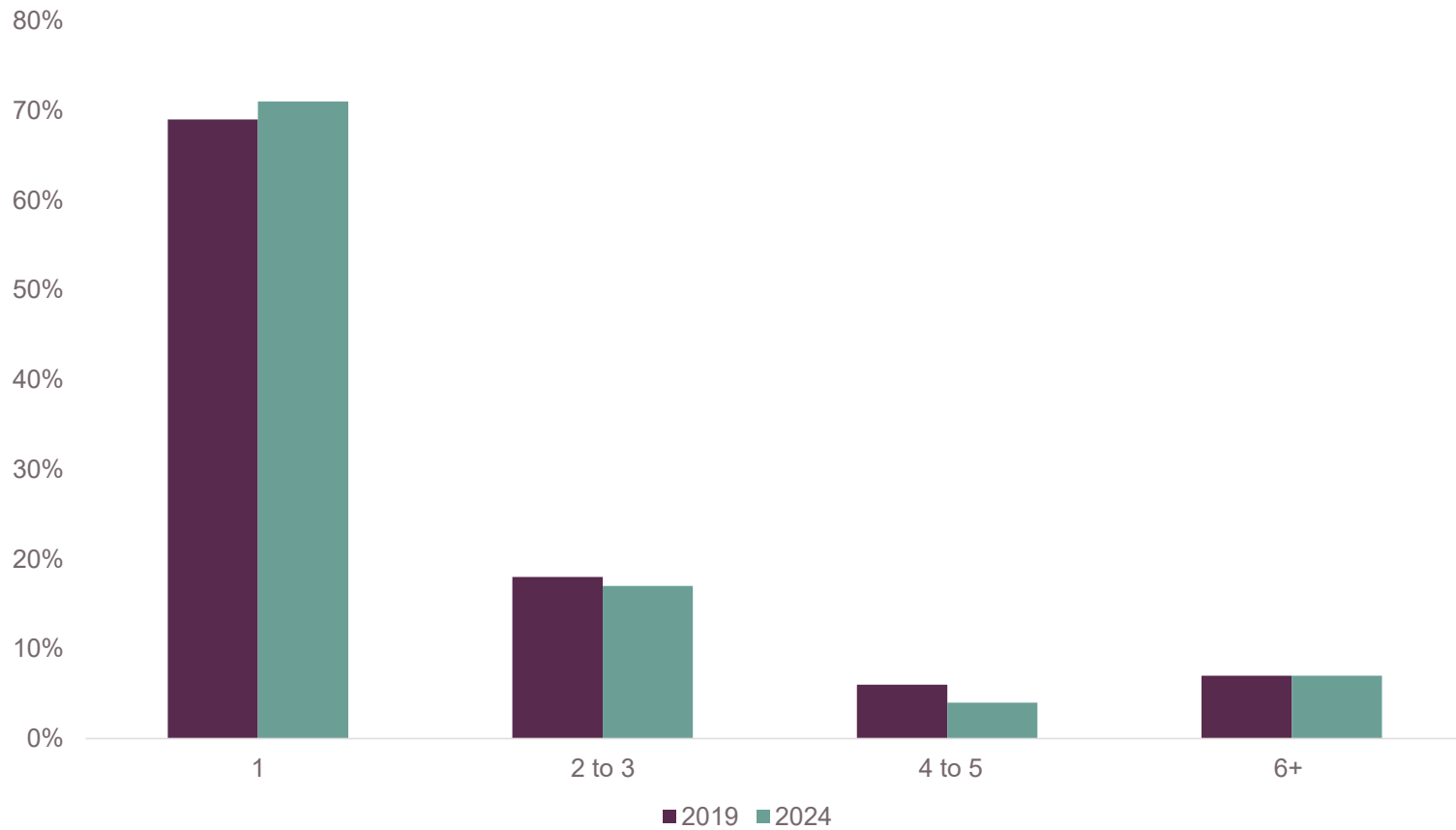
Subscription and Membership: US Orchestras

2019 vs 2024



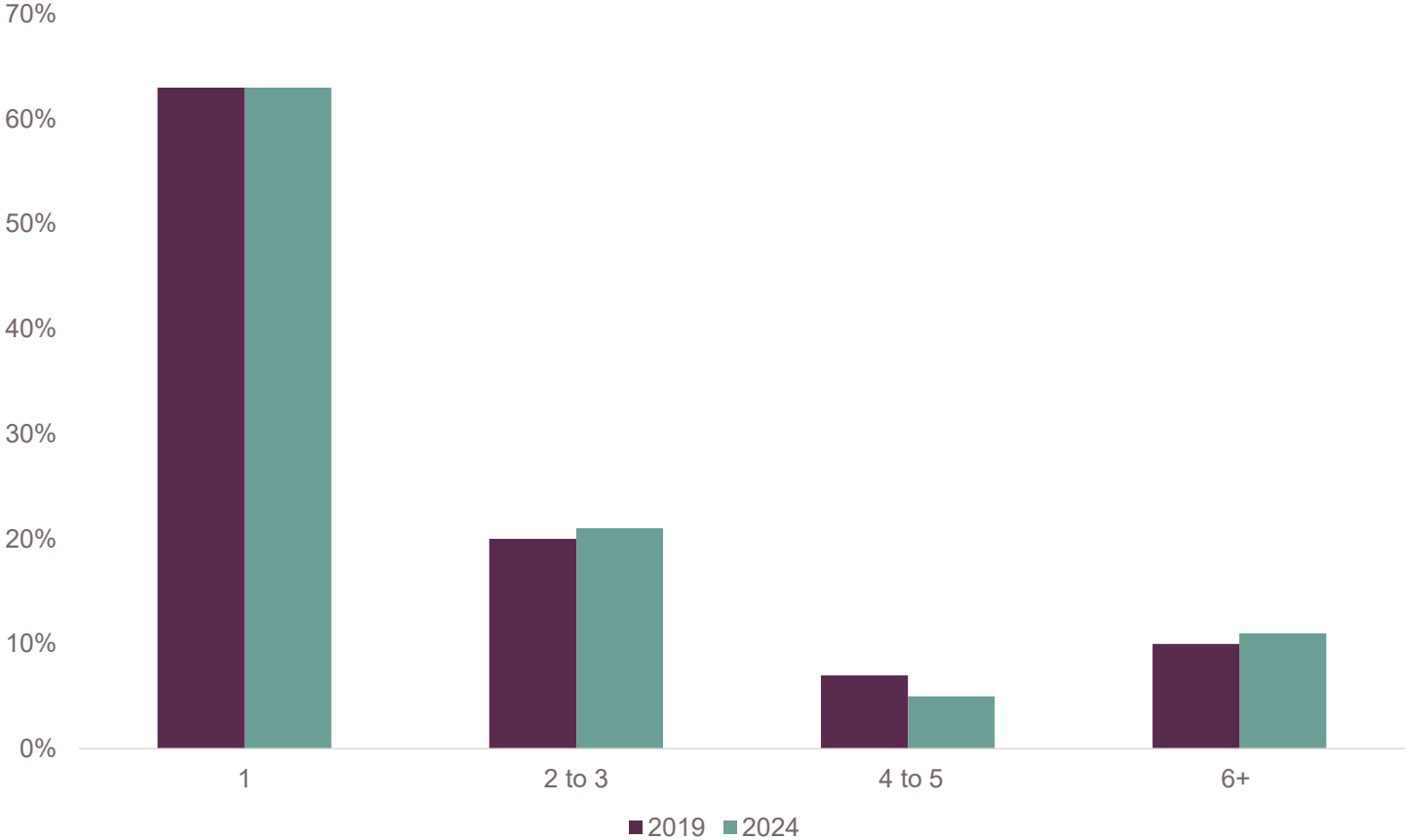
What is Driving Subscription and Membership Resurgence?

How Often Customers Attending Each Season – US Performing Arts Organizations



What is Driving Subscription and Membership Resurgence?

How Often Customers Attending Each Season – US Orchestras



Total Tickets – Singles, Subscriptions & Memberships

US Performing Arts Organizations

2019 vs 2024

2019

Revenue
\$783M

Units
18.63M

2024

Revenue
\$975M

Units
18M



Total Tickets – Singles, Subscriptions & Memberships

US Orchestras

2019 vs 2024

2019

Revenue
\$226M

Units
5.74M

2024

Revenue
\$291M

Units
4.96M



Orchestras Individual Donations

Donations: US Performing Arts Organizations

2019 vs 2024

Revenue
\$944M vs \$815M

Units
503K vs 467K



Revenue



Units



Donations: US Orchestras

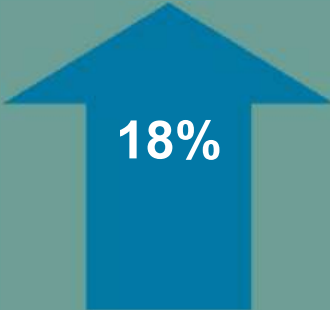
2019 vs 2024

Revenue
\$335M vs \$382M

Units
202K vs 170K



Revenue

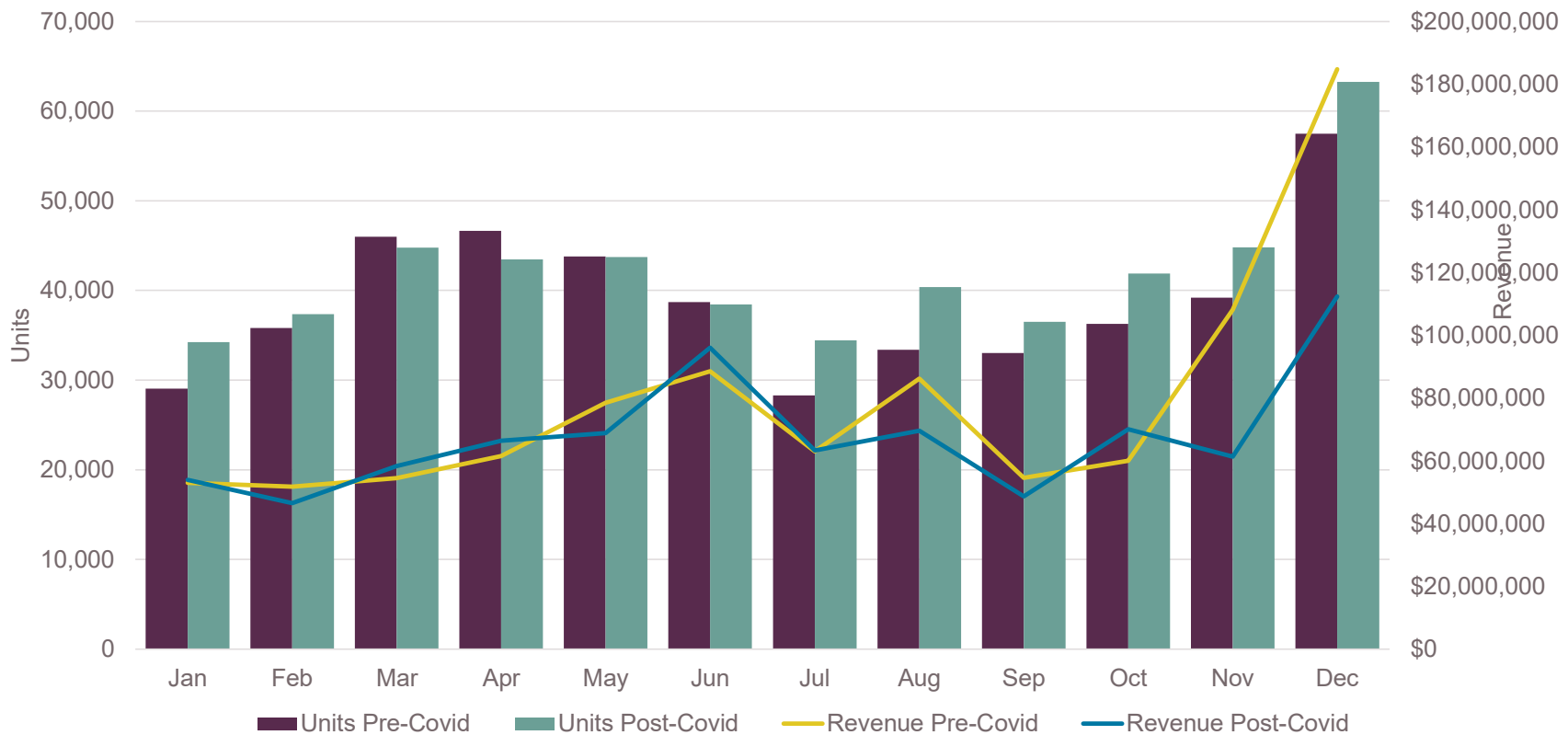


Units



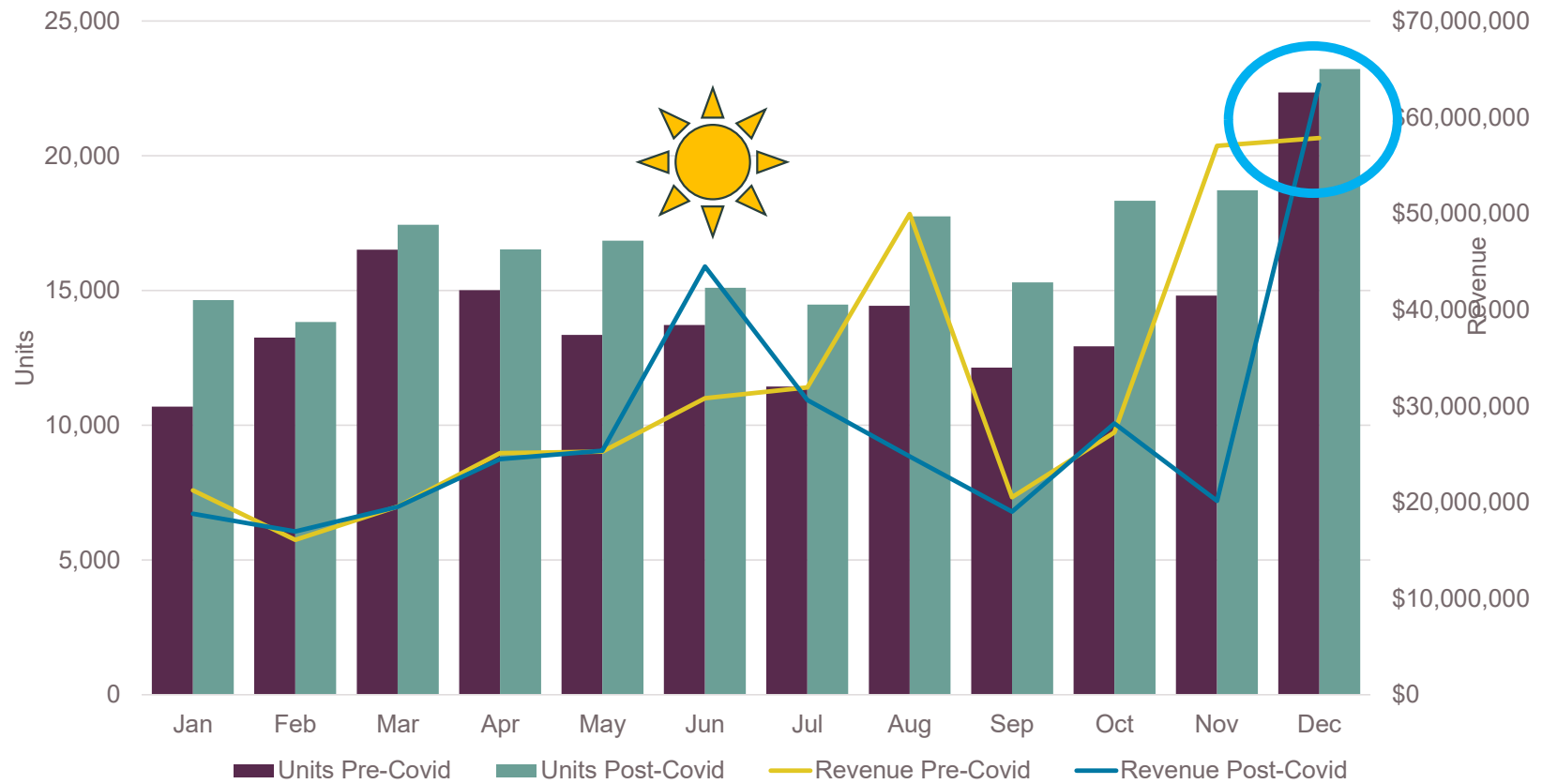
Gifts by Month: US Performing Arts Organizations

2019 vs 2024



Gifts by Month: US Orchestras

2019 vs 2024



Ave Gift Size by Month: US Performing Arts Orgs

2019 vs 2024



Ave Gift Size by Month: US Orchestras

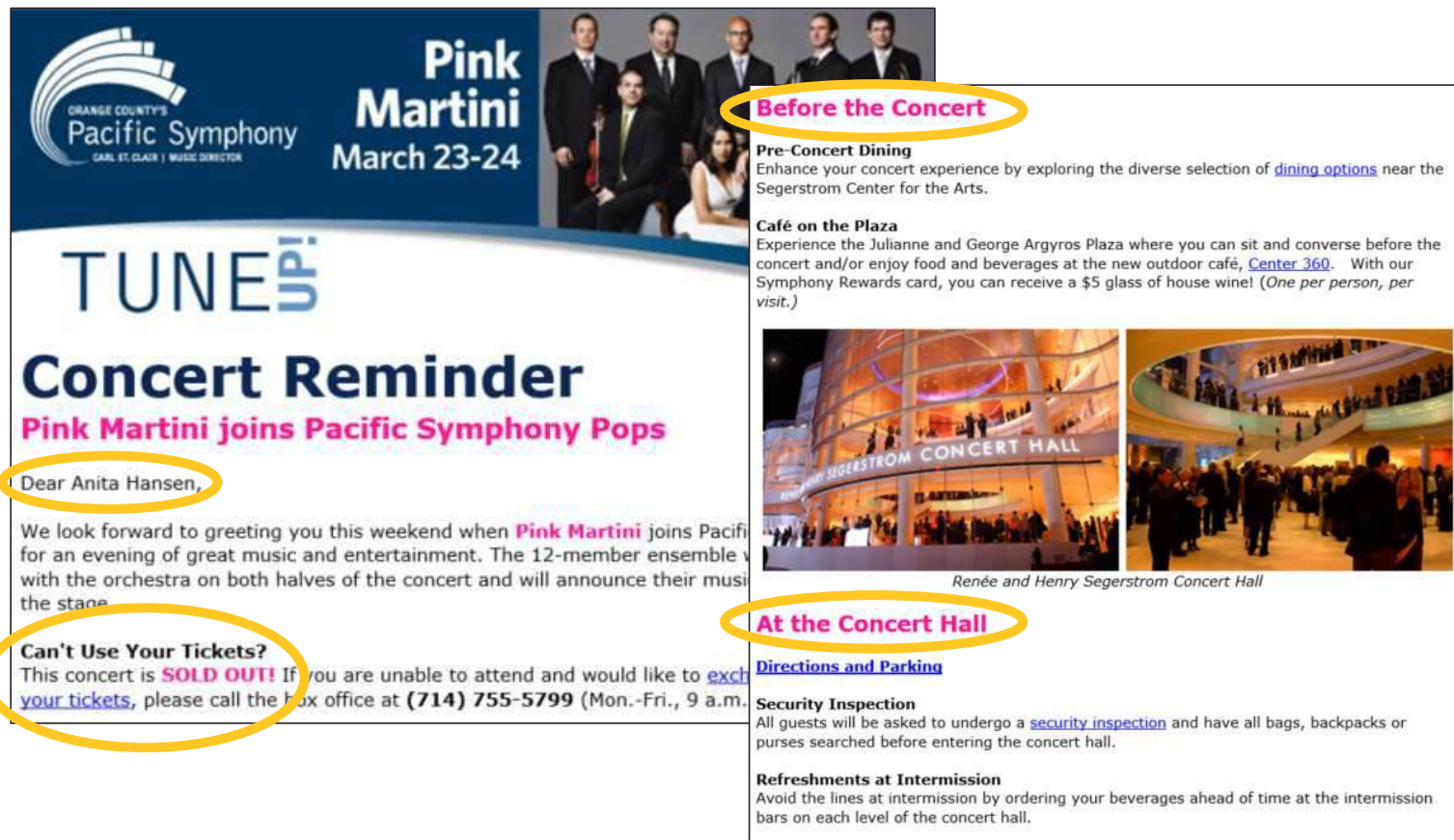
2019 vs 2024





Example: Retention can start BEFORE the show.

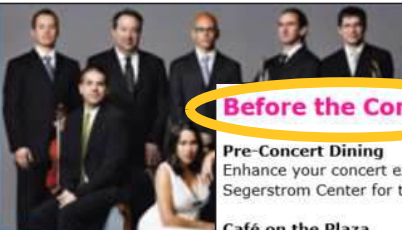
Set expectation AND build buzz



ORANGE COUNTY'S Pacific Symphony
CARL ET. CLAIR | MUSIC DIRECTOR

Pink Martini

March 23-24



TUNEUP

Concert Reminder

Pink Martini joins Pacific Symphony Pops

Dear Anita Hansen,



We look forward to greeting you this weekend when **Pink Martini** joins Pacific Symphony for an evening of great music and entertainment. The 12-member ensemble will perform with the orchestra on both halves of the concert and will announce their musical selections during the stage.

Can't Use Your Tickets? This concert is **SOLD OUT!** If you are unable to attend and would like to exchange your tickets, please call the box office at (714) 755-5799 (Mon.-Fri., 9 a.m. - 5 p.m.).

Before the Concert

Pre-Concert Dining
Enhance your concert experience by exploring the diverse selection of [dining options](#) near the Segerstrom Center for the Arts.

Café on the Plaza
Experience the Julianne and George Argyros Plaza where you can sit and converse before the concert and/or enjoy food and beverages at the new outdoor café, [Center 360](#). With our Symphony Rewards card, you can receive a \$5 glass of house wine! (One per person, per visit.)



Renée and Henry Segerstrom Concert Hall

At the Concert Hall

Directions and Parking

Security Inspection
All guests will be asked to undergo a [security inspection](#) and have all bags, backpacks or purses searched before entering the concert hall.

Refreshments at Intermission
Avoid the lines at intermission by ordering your beverages ahead of time at the intermission bars on each level of the concert hall.

Example: Retention DURING the show

In-venue experience



Welcome to Boston Ballet and ***Giselle***, a haunting classic brought to life by former company dancer and fan favorite in the role, Larissa Ponomarenko.

At intermission, we invite you to explore **The Warm-Up** in the lower lobby where you can have fun taking photos and getting to know the ballet a little better.

We hope you enjoy this performance and come back again.

Visit bostonballet.org/GIS50B for 50% off your next ballet.*

We look forward to seeing you again soon.

P.S. Please follow us at [@bostonballet](https://twitter.com/bostonballet) for behind-the-scenes access and additional offers.

*Offer expires 10/16/2019, valid on all performances of Carmen and select performances of The Nutcracker.

Example: mid-season retention

Invite existing buyers back at a lower cost-of-sale

THEATRE CEDAR RAPIDS MISSES YOU!

Hi there, Caitlin!

Not to be overly dramatic, but it's been awhile since we've seen you at a show!

Come back and experience the magic again this summer with *Newsies* — the exhilarating Broadway dance spectacular that will knock your socks off!

Enjoy this exclusive offer just for you:

BUY ONE TICKET, GET ONE 50% OFF!*
OFFER CODE: **WELCOMEBACK**

Just use your special code online at theatreocr.org or call the TCR Box Office at 319-366-8591 and mention this postcard.

HURRY! This offer is only good until May 31.

See you at the theatre!

Katie

Katie Hallman, Executive Director

* Excludes opening night performance on June 28. This offer expires at 11:59 p.m. on May 31 and is subject to availability. Not valid with any other offers or vouchers. BOGO 50% discount applies to full-price adult admission to any performance of *Newsies* at TCR. Excludes Zone 2 and student tickets. Limit 4.



102 3rd St SE
Cedar Rapids, IA 52401
319-366-8591
boxoffice@theatreocr.org
theatreocr.org





SUSTAINED MEMBERSHIP MOMENTUM

Arkansas Symphony maintains a **steady membership growth rate above 2% monthly**, with revenue pacing 3% ahead of goal. Sold-out chamber series events and an 18% rise in member reservations for classical programming have driven a 37% year-to-date increase in single ticket sales for these performances, showcasing the lasting impact of their membership strategy.



ASO | Photo by Kelly Hicks

Experimenting with the follow up offer

Arkansas Symphony

Thank You For Attending Our Concert With Kerson Leong!

We Would Love For You To Join Us Again To Enjoy Many Live ASO Concerts & Offer You...

29+ Concerts For Only \$9/Month!

Your Symphony On Your Schedule

When you sign up, your preferred payment method will be automatically charged, & you can reserve tickets & **enjoy any concert** in our main ASO series - Masterworks, Pops, River Rhapsodies!

BECOME A MEMBER TODAY!
KIDS ARE FREE WITH ENTERGY KIDS' TICKETS
ArkansasSymphony.org | 501-666-1761

**COMING SOON...
GUSTAV HOLST'S
THE PLANETS
APRIL 6-7, 2024
AT THE ROBINSON CENTER**

ASO ARKANSAS SYMPHONY ORCHESTRA
P.O. Box 7328 • Little Rock, AR 72217

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Same-season new-to-file retention

FY2023: Standard "killer offer" of 50% off the next concert

9% retention rate

FY2024: Upgrade to membership, with a tag about next concert

11% retention rate

Subscription Service Model: How To Build A Profitable Business

Cheryl Robinson Contributor @

I focus on embracing the pivot during life's transitions.

Follow

🔖 0

Mar 9, 2024, 07:30am EST

Forbes

The global subscription economy market size is projected to be \$1.5 trillion in 2025, up from \$650 billion in 2020. An average US consumer spent \$273 monthly on subscription services in 2021 compared to \$237 monthly in 2018.

LOVE

the one you're with.



If you are serious about closing your gap, book time with me to discuss how to do that.







Help
Spread The
Word

ARTS & CULTURE BENCHMARK

Real-time intelligence on the impact of our changing world. Understand how your ticketing data compares to an industry leading benchmark of over 400 organizations across North America, the UK, and Ireland.

trgarts.com/benchmark

TR
ARTS





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