

TRG's Arts and Culture Benchmark

US Orchestras Engagement Trends Through Q2 2024



July 17, 2024



Eric Nelson
VP, Global Partnerships
TRG Arts



Karen Yair
VP, Knowledge, Learning & Leadership
League of American Orchestras

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.

40+ US Orchestras in the Benchmark



KEY METRICS Benchmark figures based on averages from 53 venues in the North America Music benchmark

BENCHMARK TERRITORY
North America
BENCHMARK TYPE
Music

OPEN IN NEW TAB
WHAT'S NEW

KEY METRICS

LAST 30 DAYS

YEAR TO DATE

TYPOLGY

ADVANCE

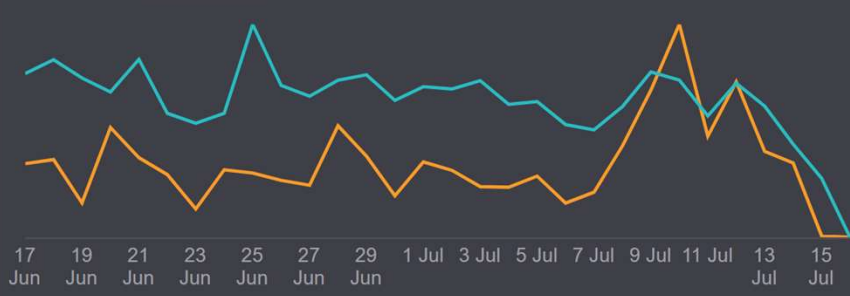
SUBSCRIPTIONS

DONATIONS

SENTIMENT



LAST 30 DAYS **REVENUE** TICKETS YEAR TO DATE **REVENUE** TICKETS



Your Data
\$543,081

Revenue in the last 30 days

\$394,044
Same period in 2019 **38%**
vs 2019

\$478,217
Same period in 2023 **14%**
vs 2023

The Benchmark
\$490,948

Average revenue in the last 30 days

\$396,378
Same period in 2019 **24%**
vs 2019

\$526,306
Same period in 2023 **-7%**
vs 2023

Your Data vs The Benchmark

>0 = Better than the benchmark
<0 = Worse than the benchmark

14%
vs 2019 Benchmark

20%
vs 2023 Benchmark

LAST 30 DAYS DASHBOARD

YEAR TO DATE DASHBOARD

Advance Revenue

Revenue for unmatured performances over the next 12 months

\$3,709,232
Your data

\$2,553,452
Average of venues in the benchmark

45%
Your data vs the benchmark

ADVANCE DASHBOARD

Subscription Revenue

Subscription revenue over the year to date

\$1,590,103
Your data

\$2,991,991
Average of venues in the benchmark

-47%
Your data vs the benchmark

SUBSCRIPTION DASHBOARD

Customer Typology

New Customers is your largest active segment and makes up:

5,002 **31%**
Patrons % patrons

4,471 **41%**
Patrons % Patrons

TYPOLGY DASHBOARD

Donations

Received income over the year to date

\$5,557,911 **\$5,339,296**
Your Data Avg benchmark venue

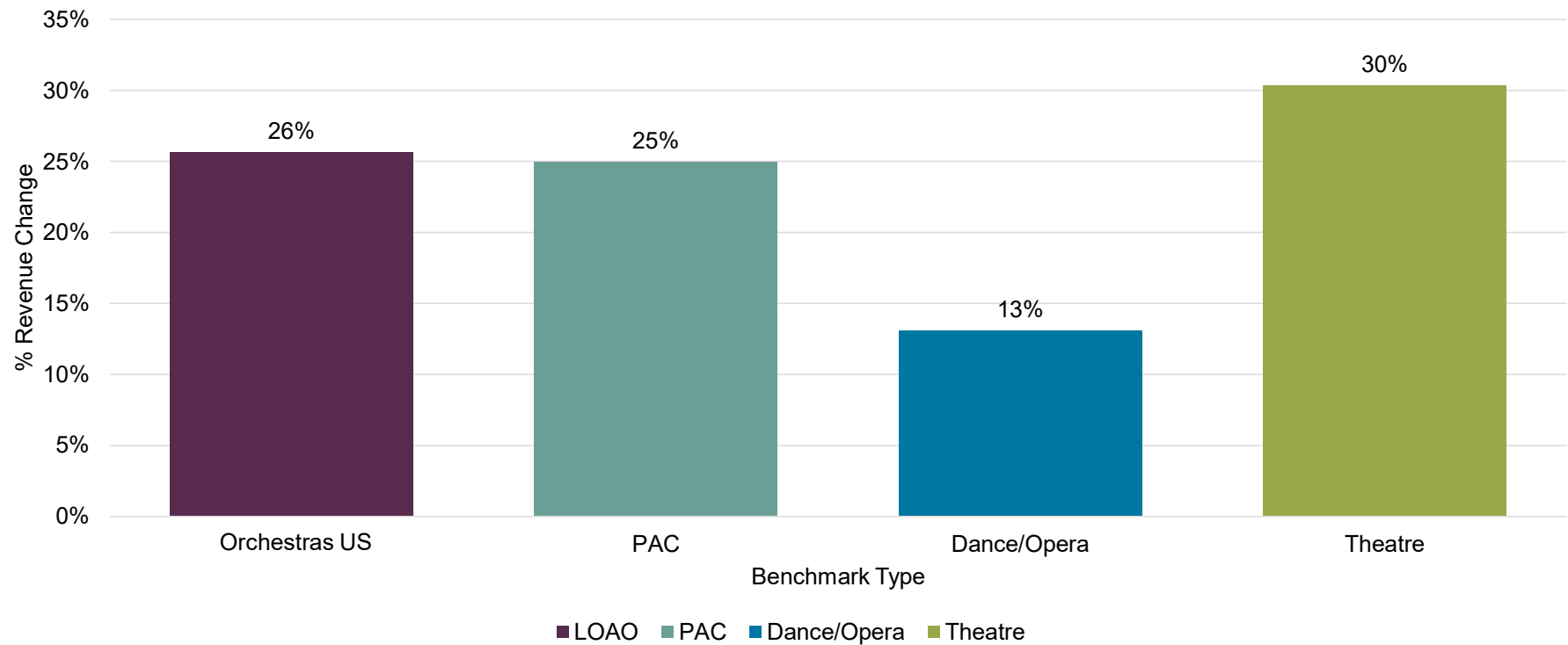
Your data vs the benchmark **4%**

DONATION DASHBOARD

Performing Arts Sector Trends

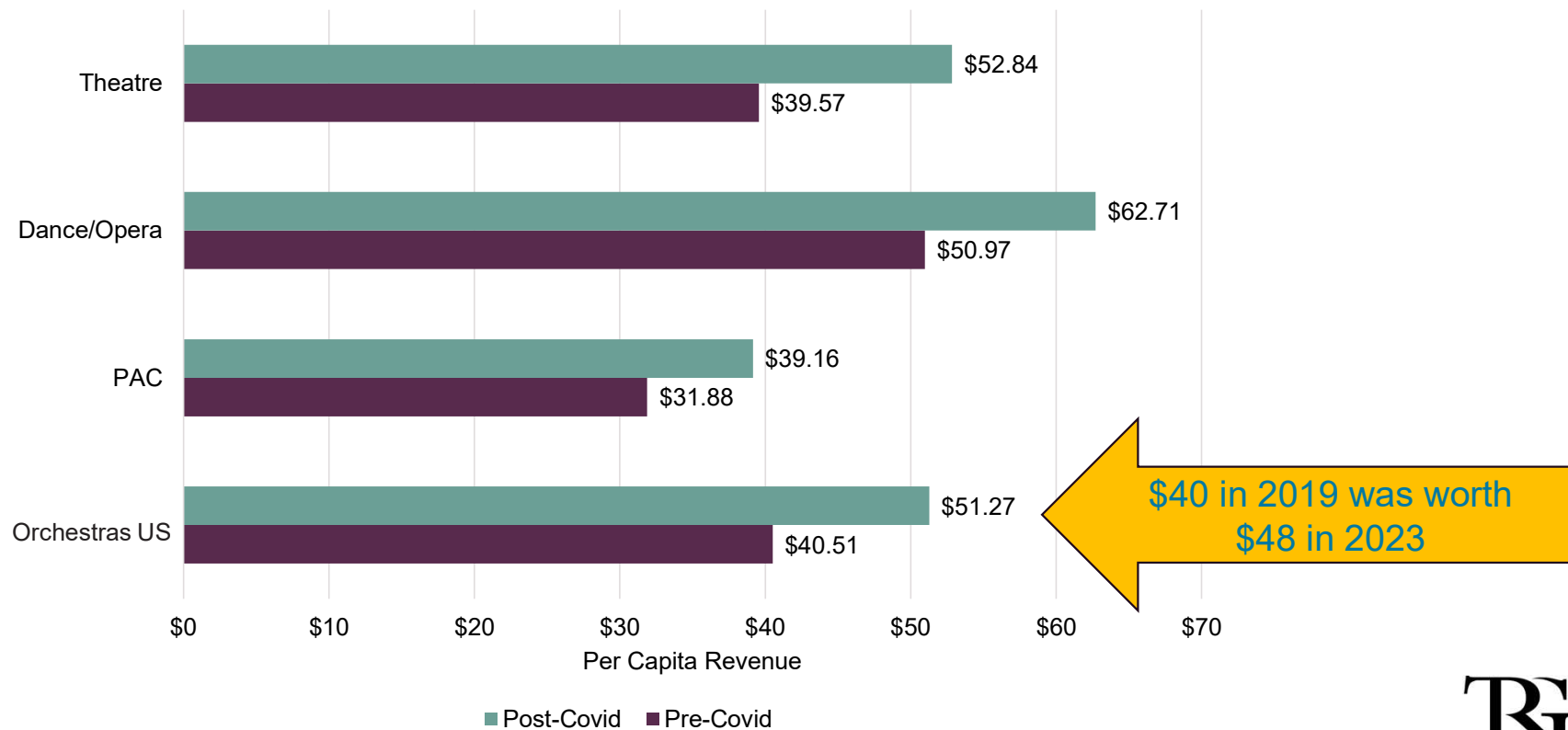
Ticket Revenue Change: US Performing Arts Org

By Genres: July 2018-June 2019 vs July 2023-June 2024



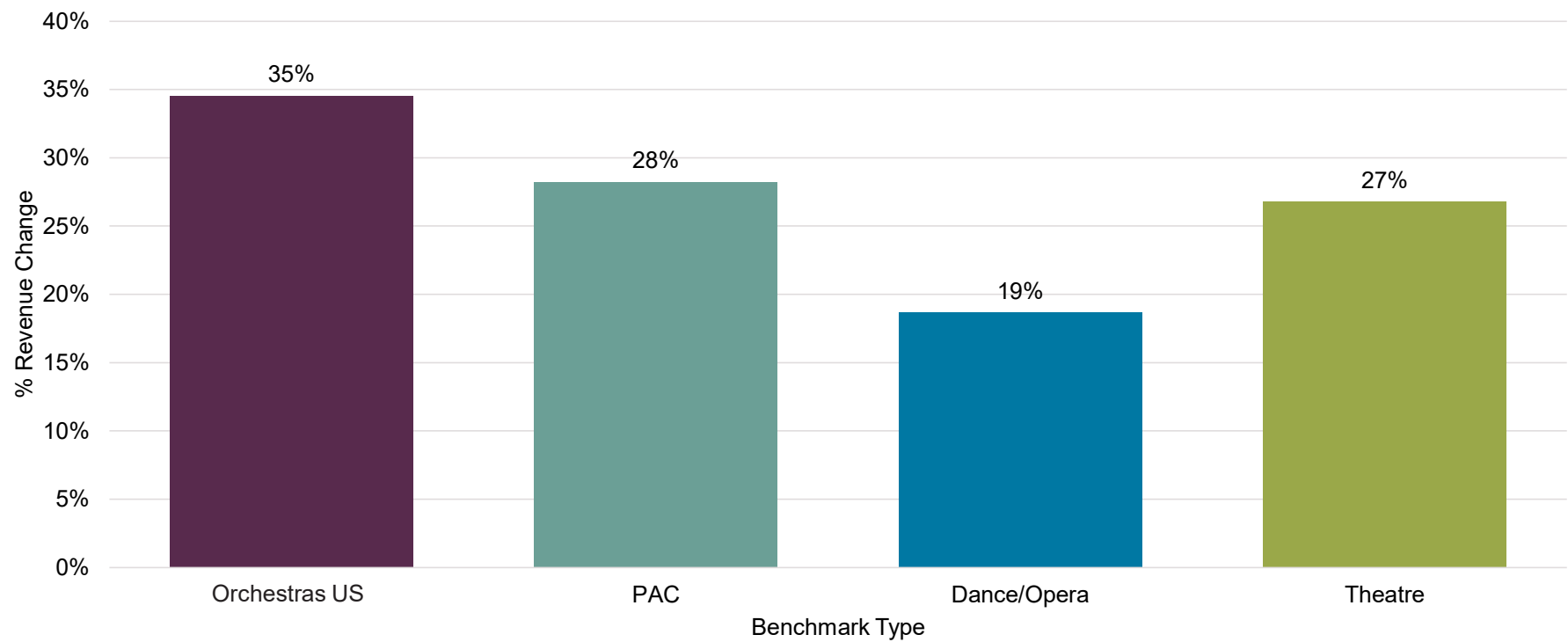
Ticket Per Capita Revenue: US Performing Arts Orgs

By Genres: July 2018-June 2019 vs July 2023-June 2024



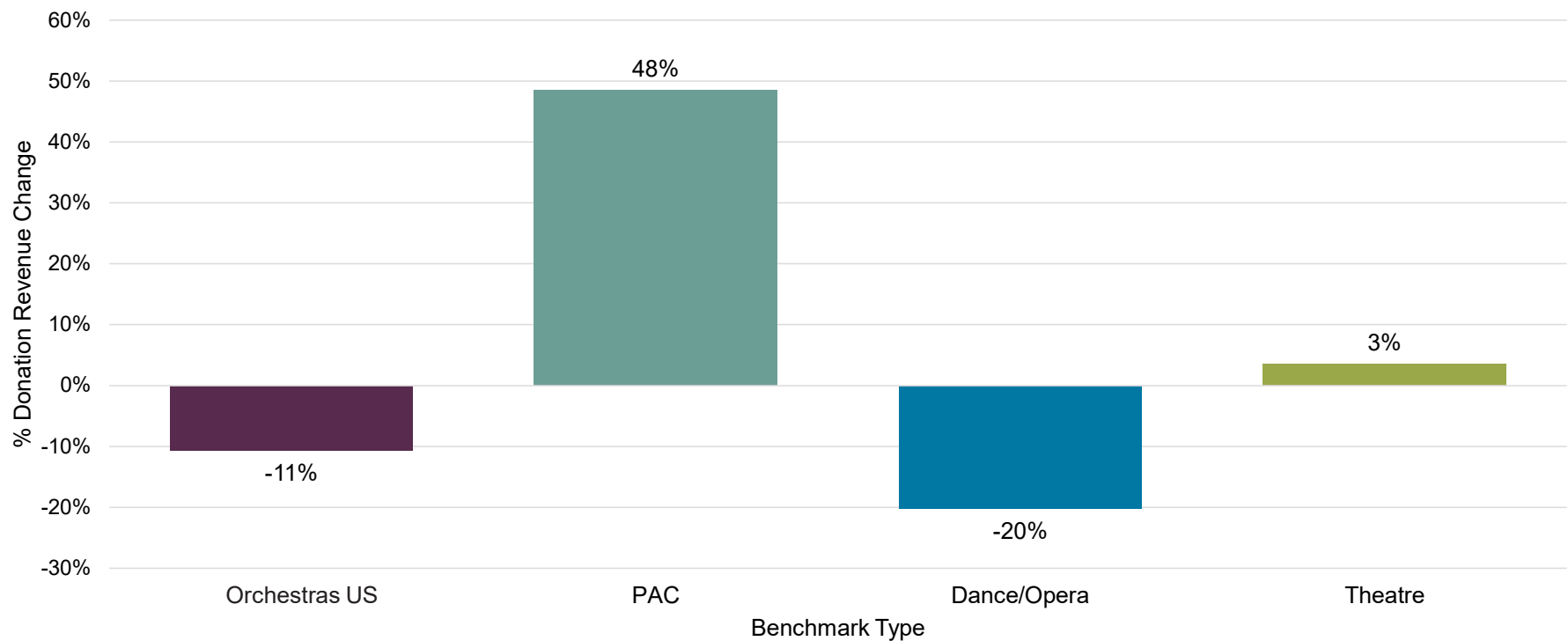
Subscription Revenue Change: US Performing Arts Org

By Genres: July 2018-June 2019 vs July 2023-June 2024



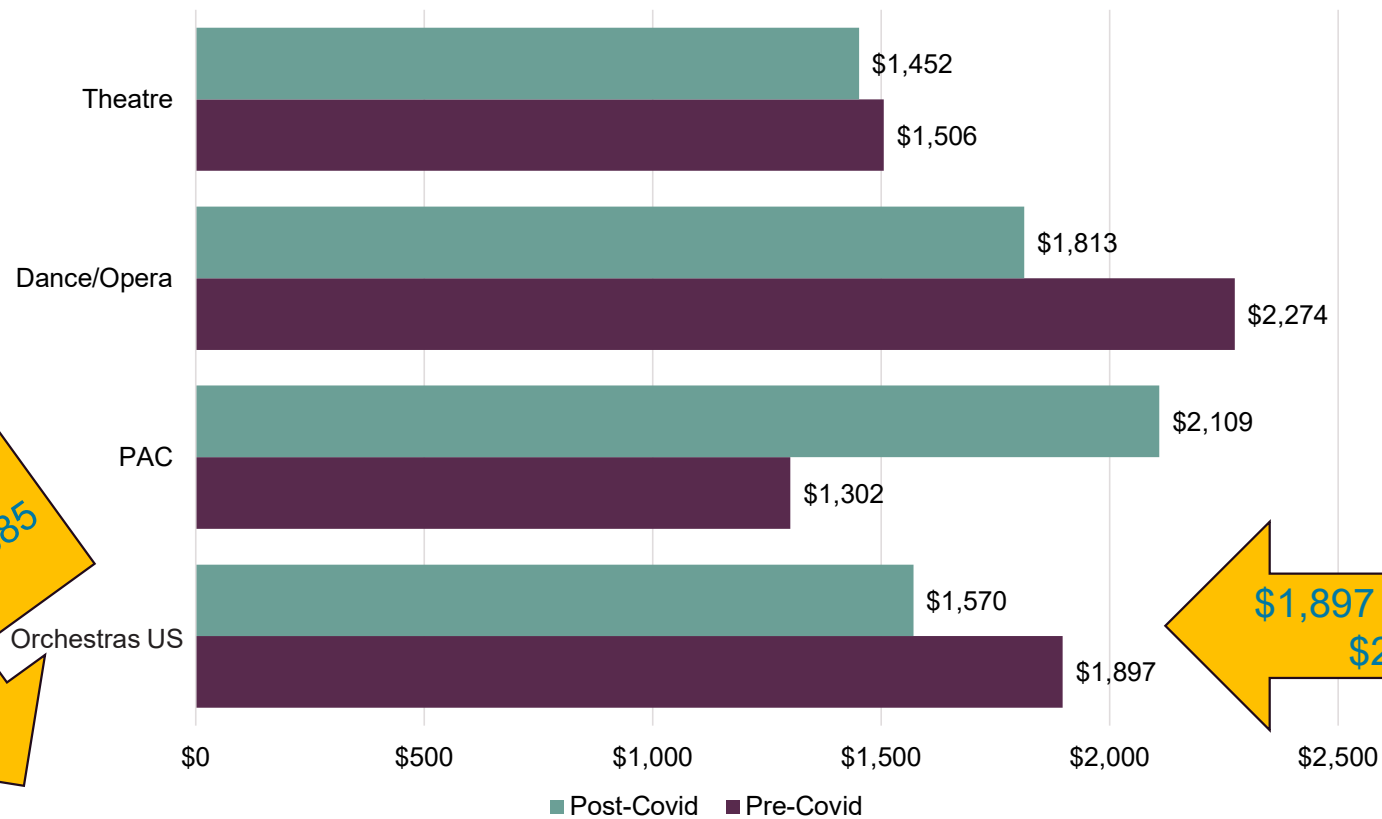
Donation Revenue Change: US Performing Arts Org

By Genres: July 2018-June 2019 vs July 2023-June 2024



Ave. Gift Revenue: US Performing Arts Orgs

By Genres: July 2018-June 2019 vs July 2023-June 2024

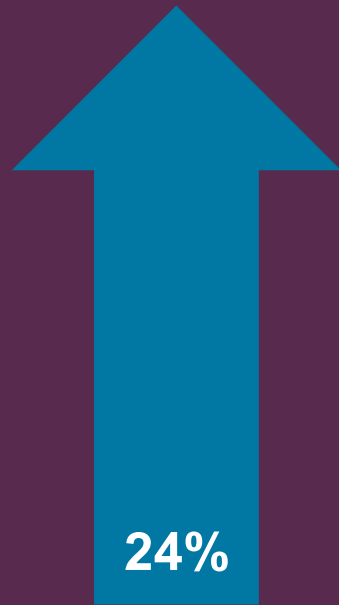


Instead of Ave Gift being down \$327 actually down \$685

\$1,897 in 2019 was worth \$2,255 in 2023

Orchestras Ticket Sales

Single Ticket Sales: US Performing Arts Organizations July 2018-June 2019 vs July 2023-June 2024



Revenue

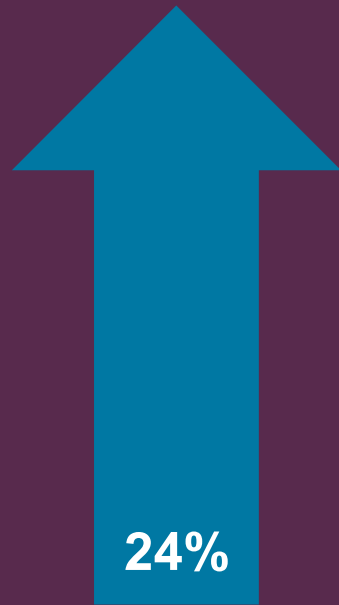


Units



Single Ticket Sales: US Orchestras

July 2018-June 2019 vs July 2023-June 2024



Revenue

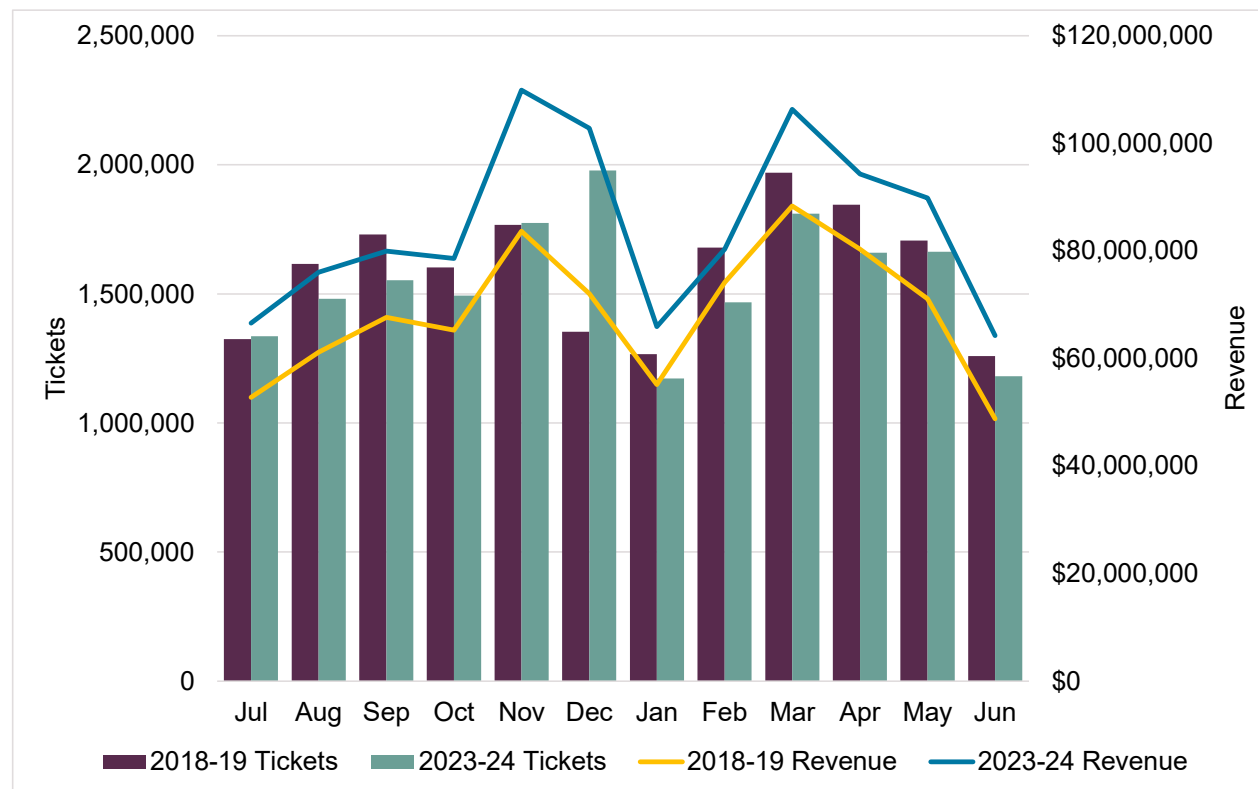


Units



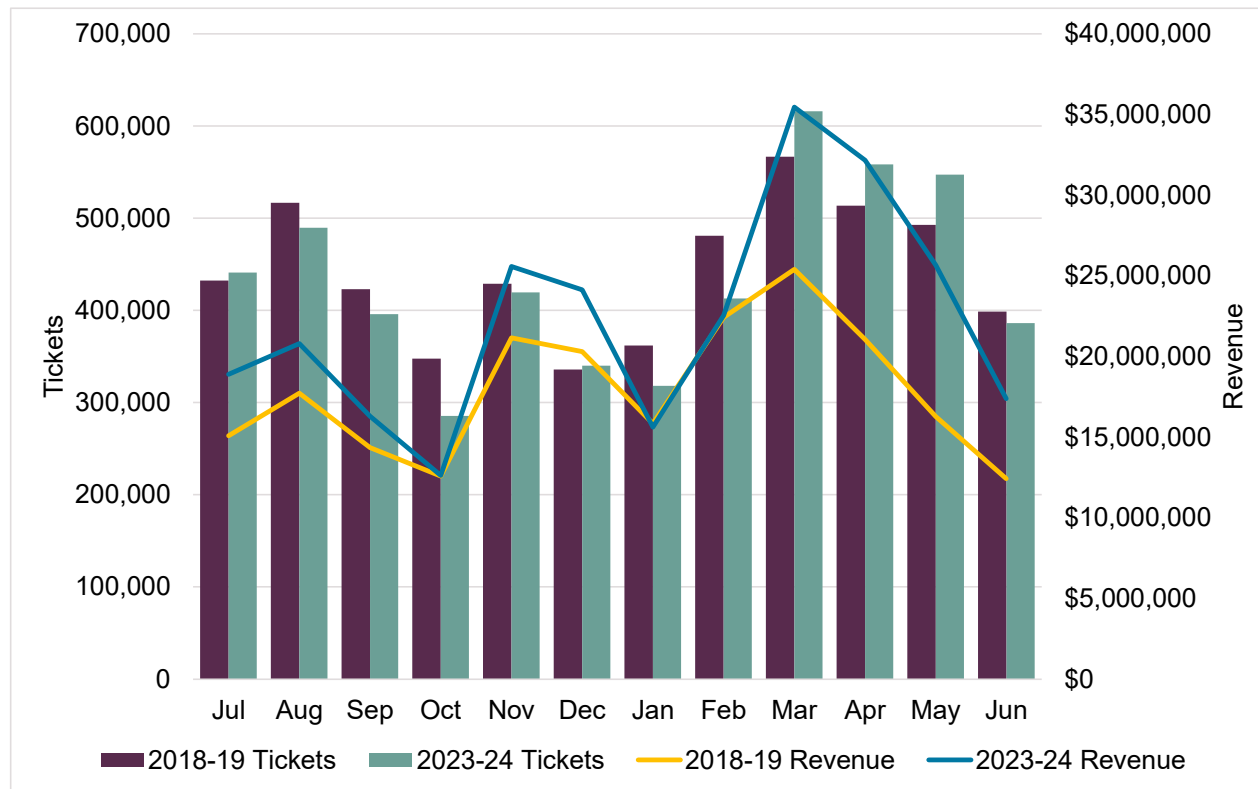
Single Tickets: US Performing Arts Organizations

July 2018-June 2019 vs July 2023-June 2024



Single Tickets: US Orchestras

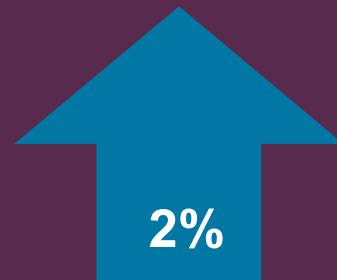
July 2018-June 2019 vs July 2023-June 2024



Subscription Sales: US Performing Arts Organizations July 2018-June 2019 vs July 2023-June 2024



Revenue



Units
(Not Packages)



Subscription Sales: US Orchestras

July 2018-June 2019 vs July 2023-June 2024



Revenue



Units
(Not Packages)



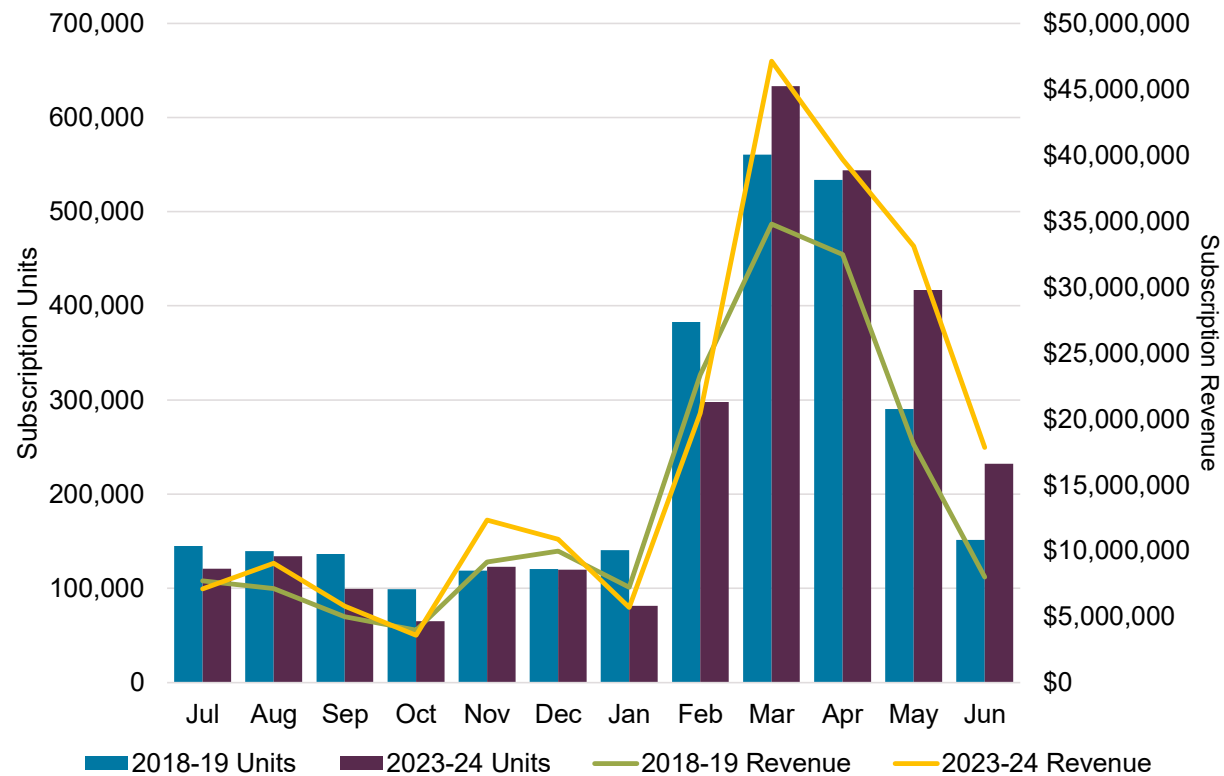
A blurred photograph of a newspaper printing press. The image shows multiple sheets of newspaper moving rapidly through a complex industrial machine. The background is dark and out of focus, emphasizing the motion of the paper. Overlaid on the center of the image is the text "STOP THE PRESSES!!" in a large, bold, white, sans-serif font. The text is slightly shadowed, making it stand out against the busy background.

**STOP THE
PRESSES!!**



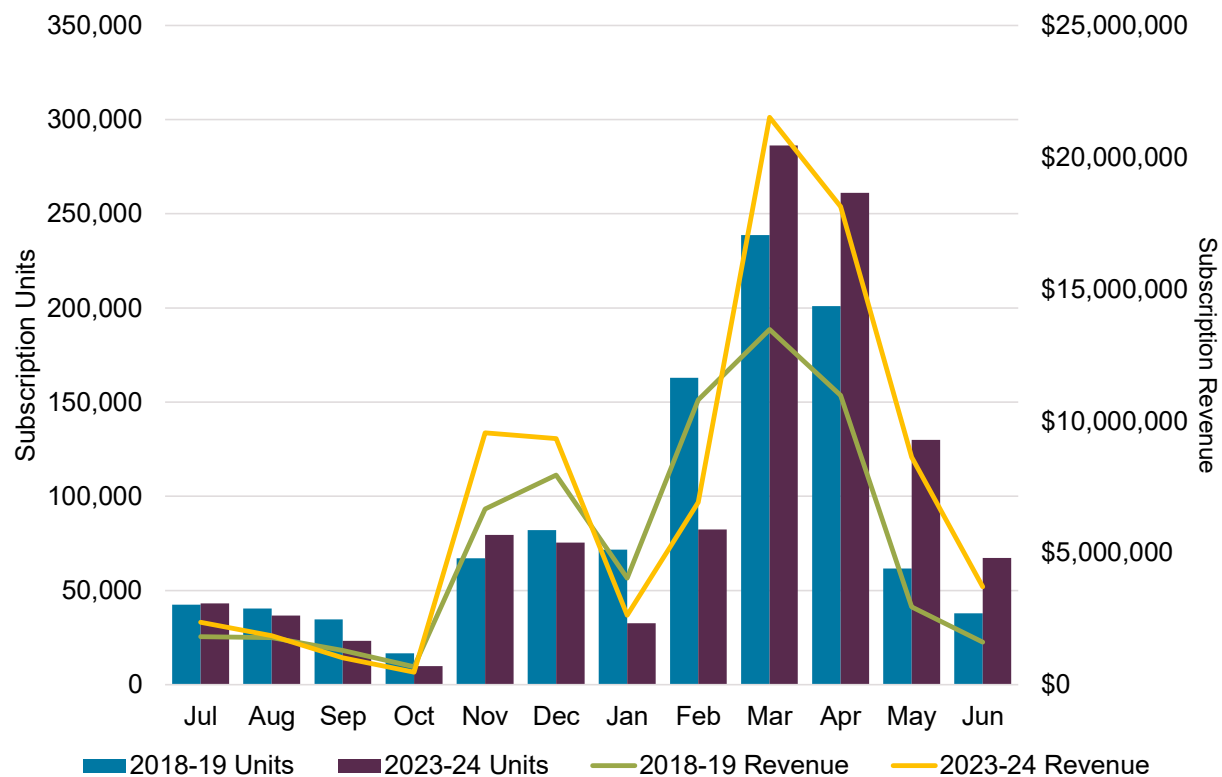
Subscriptions: US Performing Arts Organizations

July 2018-June 2019 vs July 2023-June 2024



Subscriptions: US Orchestras

July 2018-June 2019 vs July 2023-June 2024



What is Driving Subscription Resurgence

Two factors to halt our “hate watching” of subscriptions

March-June

Strong
Subscription
On-Sale &
Renewal

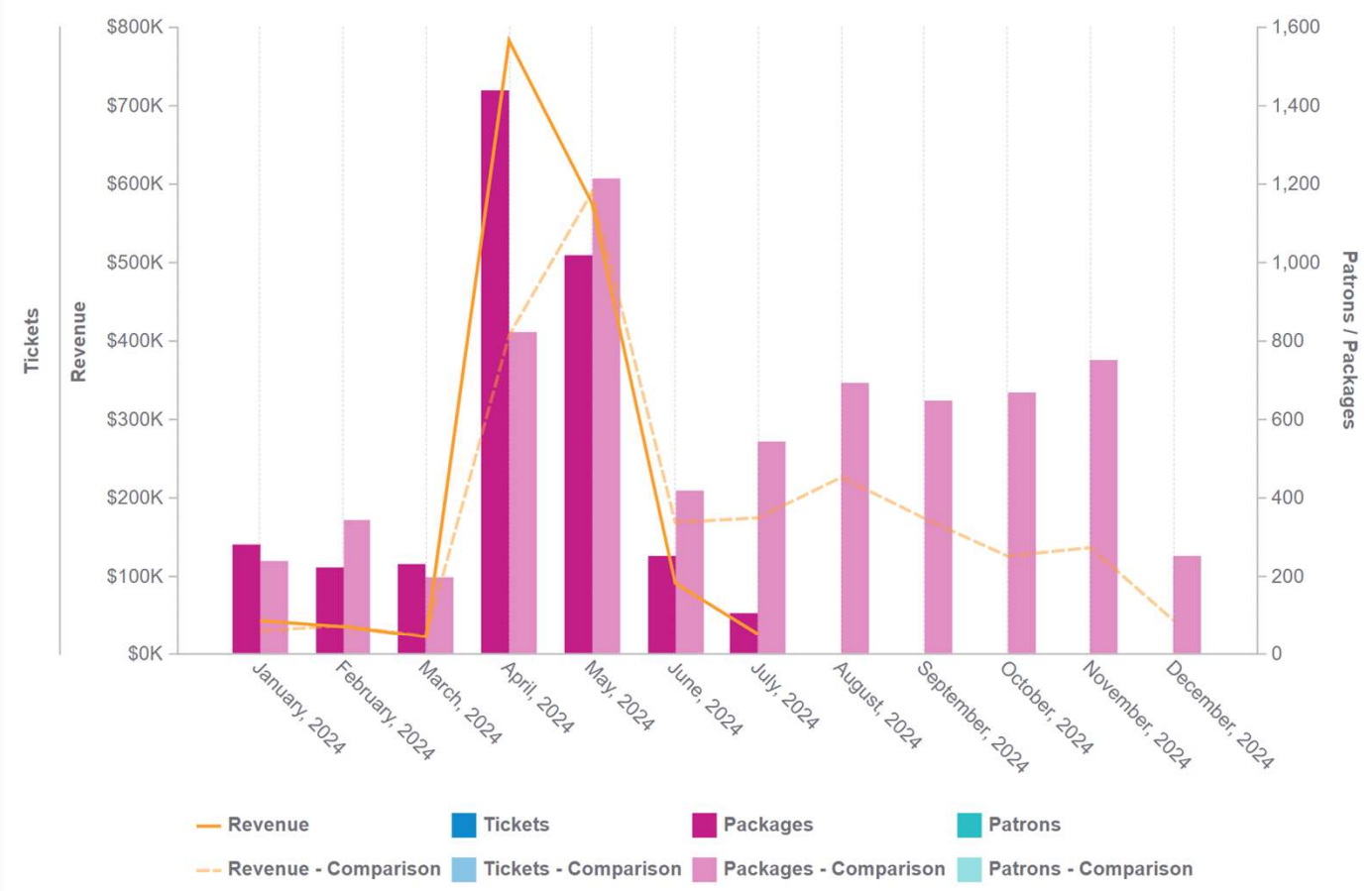
Per Unit Per Cap

+20%
\$72 vs \$57

*(Adjusted for
inflation, \$57 in 2019
is \$70 in 2024)*

This dashboard shows subscriptions revenue, tickets, packages and patrons over time and can be filtered by Season and New/Renew. You can also compare the proportion of revenue that comes from renewals with the benchmark.

RENEWAL STATUS All SEASON All DISPLAY Reve... Tick... Packa... Patrons



BENCHMARK TERRITORY
North America

BENCHMARK TYPE
Music

OPEN IN NEW TAB

WHAT'S NEW

KEY METRICS

LAST 30 DAYS

YEAR TO DATE

TYPOLOGY

ADVANCE

SUBSCRIPTIONS

DONATIONS

SENTIMENT



RENEWAL STATUS

All

Your Data

Over the year to date

\$1,590,103

In the same time period in 2023

\$1,313,999

Comparing the year to date to the same period in 2023

21%

The Benchmark

Over the year to date

\$2,991,991

In the same time period in 2023

\$2,445,349

Comparing the year to date to the same period in 2023

22%

Your Data vs. The Benchmark

-1%

>0 = Better than the benchmark
<0 = Worse than the benchmark

Based on averages from 53 venues in the North America Music benchmark

Customer Typology

Segment Definitions? Think **R(ecency)**, **F(requency)**, **M(onetary)**, **G(rowth)**

Acquisition

- **New Customer**

Current Customers, at least ONCE within past 18 months

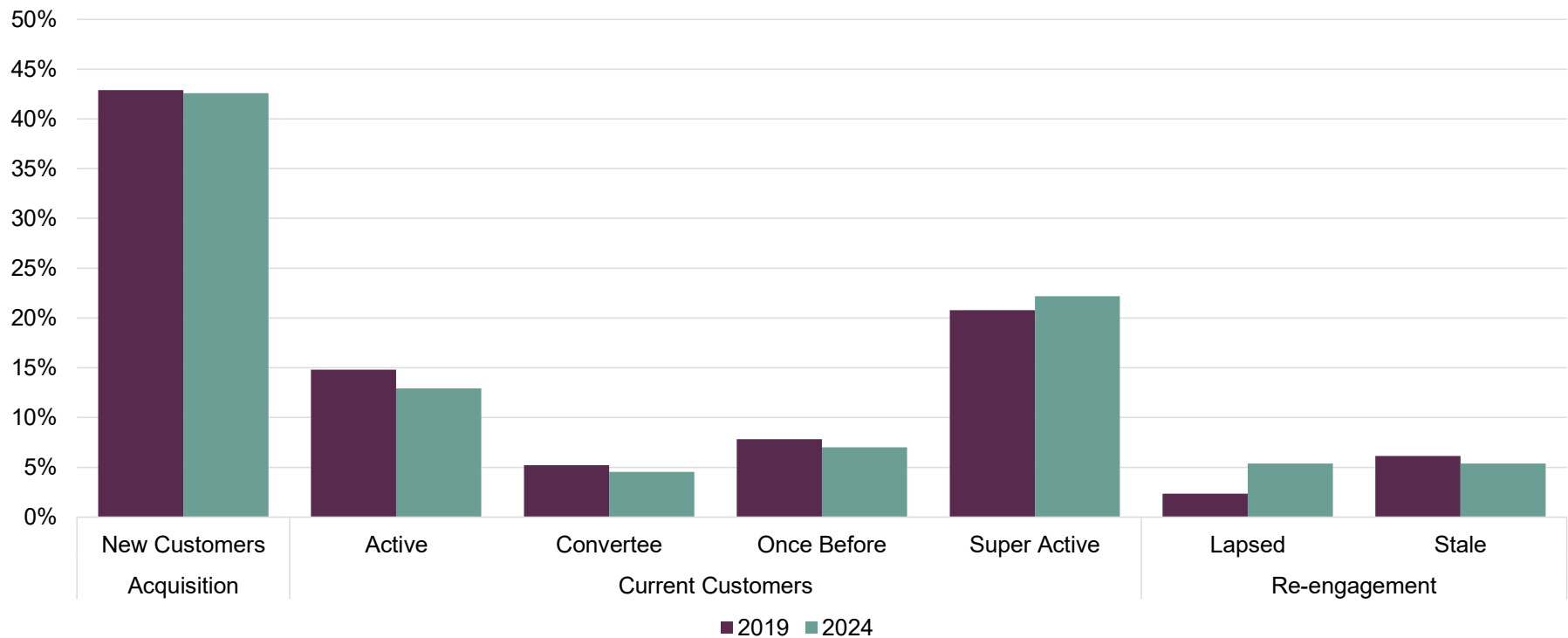
- **Once Before** – once before
- **Converttee** – twice before
- **Active** –3-9 times in their history
- **Super Active** –10+ times in their history

Re-Engaging, BUT...

- **Stale** – last attendance prior to now? 18-36 months ago
- **Lapsed** – last attendance prior to now? 3 years or more ago

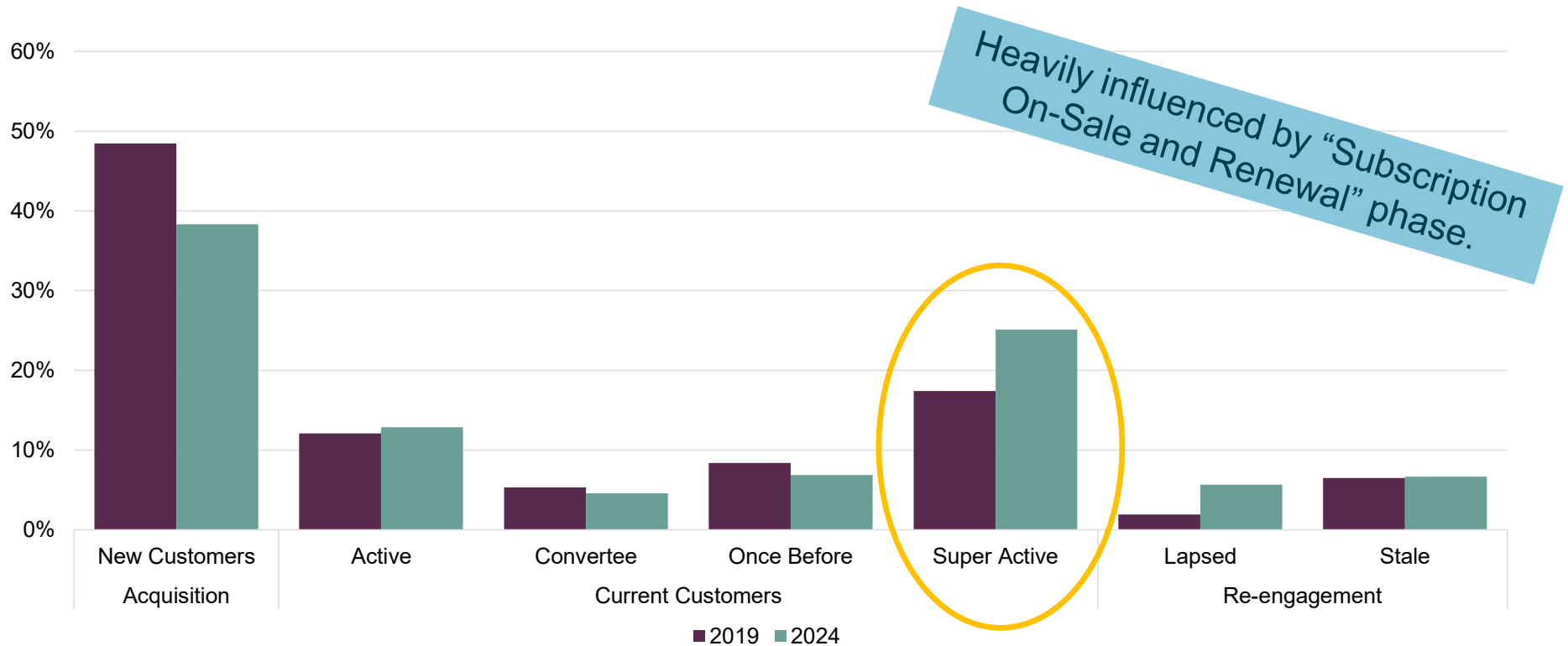
Ticket Buyers by Full Typology – 2019 vs 2024

US Performing Arts Organizations



Ticket Buyers by Full Typology – 2019 vs 2024

US Orchestras – Our biggest fans are driving this behavior



Arts & Culture Benchmark

BENCHMARK TERRITORY
North America

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KEY METRICS

LAST 30 DAYS

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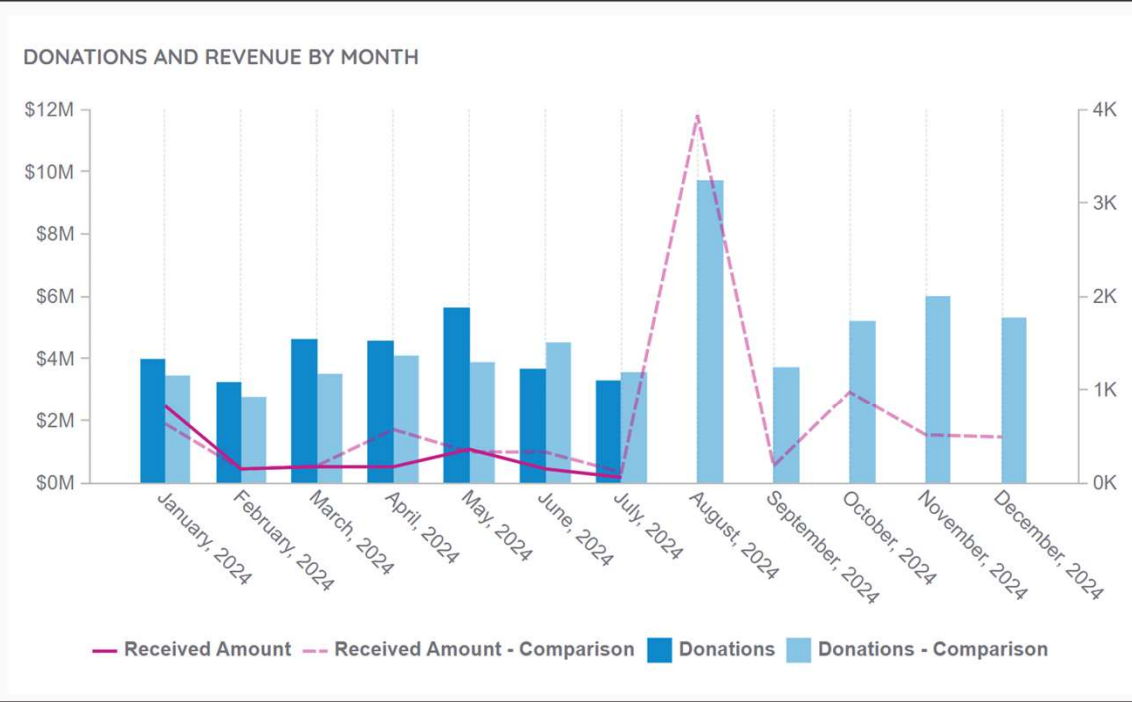
DONATIONS

SENTIMENT

DONATIONS DONOR CROSSOVER GIFT SIZE All FUNDS All

COMPARE TO 2019 2023

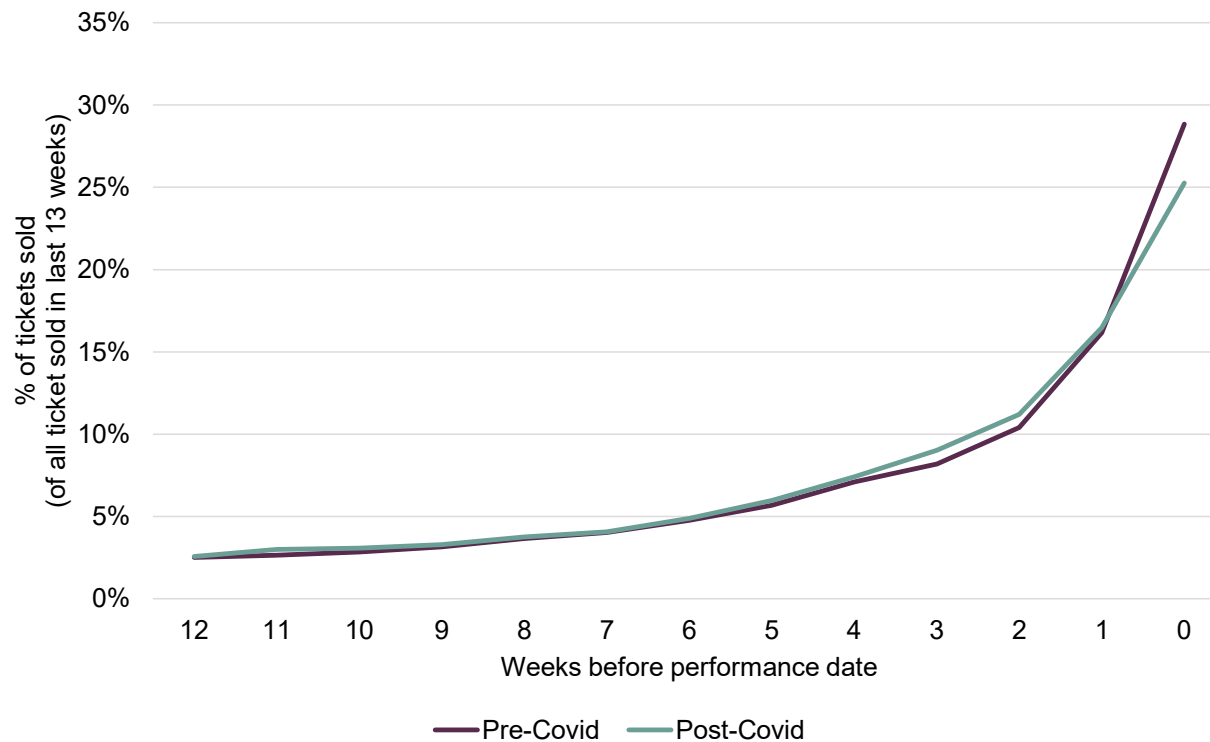
TOTAL PATRONS			TOTAL DONATIONS			TOTAL RECEIVED		
7,996	6,541	22%	9,580	7,899	21%	\$5,567,321	\$6,689,399	-17%
Year to date	Same period 2019	vs 2019	Year to date	Same period 2019	vs 2019	Year to date	Same period 2019	vs 2019
AVERAGE GIFTS PER PATRON			AVERAGE GIFT VALUE					
1.2	1.2	-1%	\$581	\$847	-31%			
Year to date	Same period 2019	vs 2019	Year to date	Same period 2019	vs 2019			





Sales Pacing: Weeks Out US Performing Arts Orgs

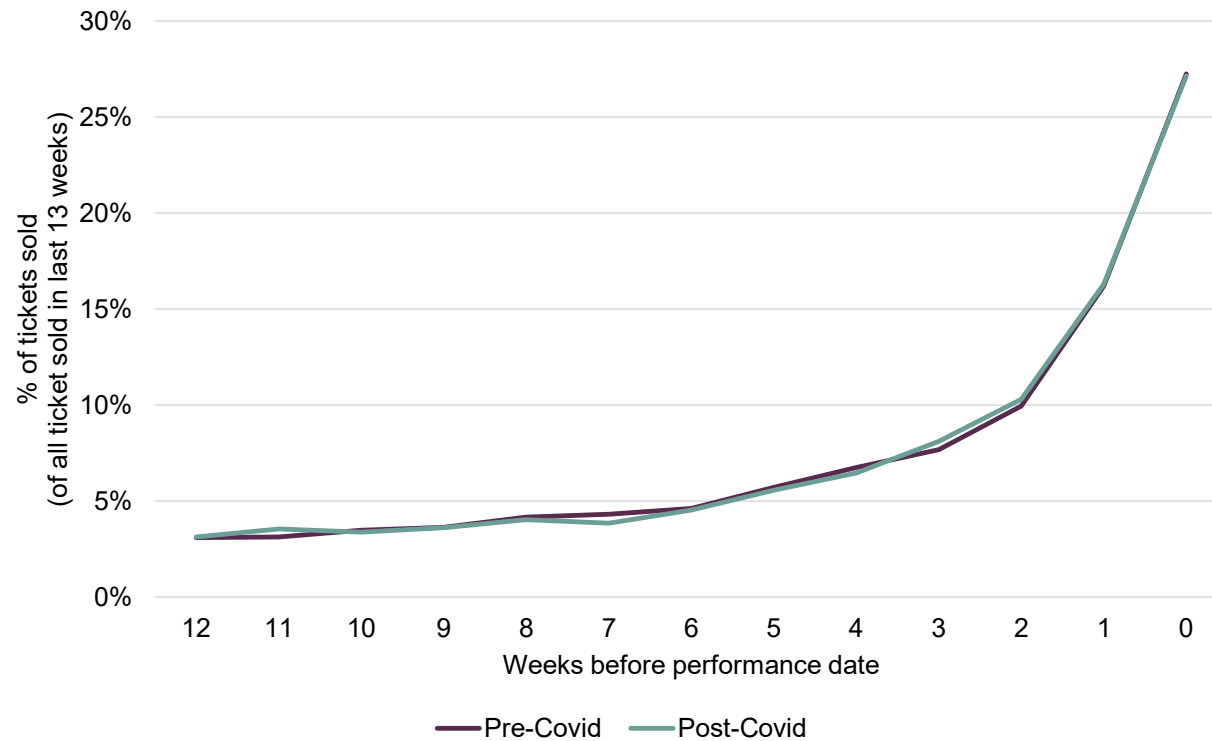
July 2018-June 2019 vs July 2023-June 2024



Purchase within
2 weeks
2019: 37%
2023: 35%

Sales Pacing: Weeks Out US Orchestras

July 2018-June 2019 vs July 2023-June 2024



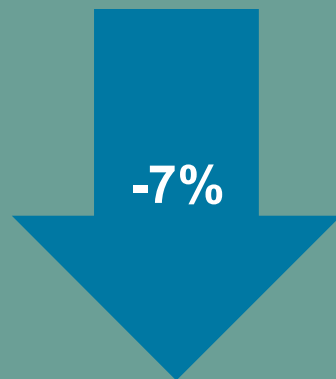
Purchase within
2 weeks

2019: **31%**

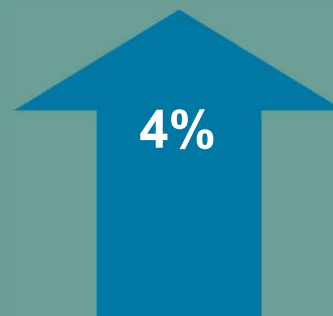
2023: **31%**

Orchestras Individual Donations

Donations: US Performing Arts Organizations July 2018-June 2019 vs July 2023-June 2024



Revenue



Units



Donations: US Orchestras July 2018-June 2019 vs July 2023-June 2024



Revenue

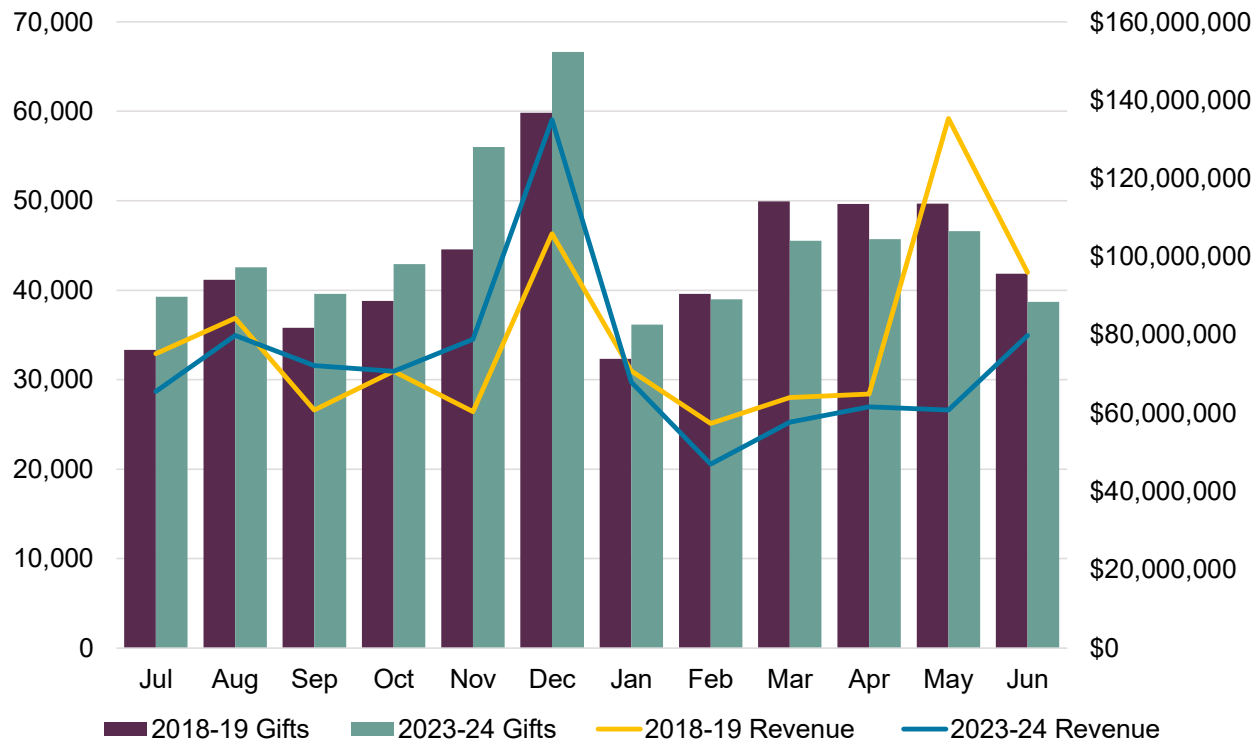


Units



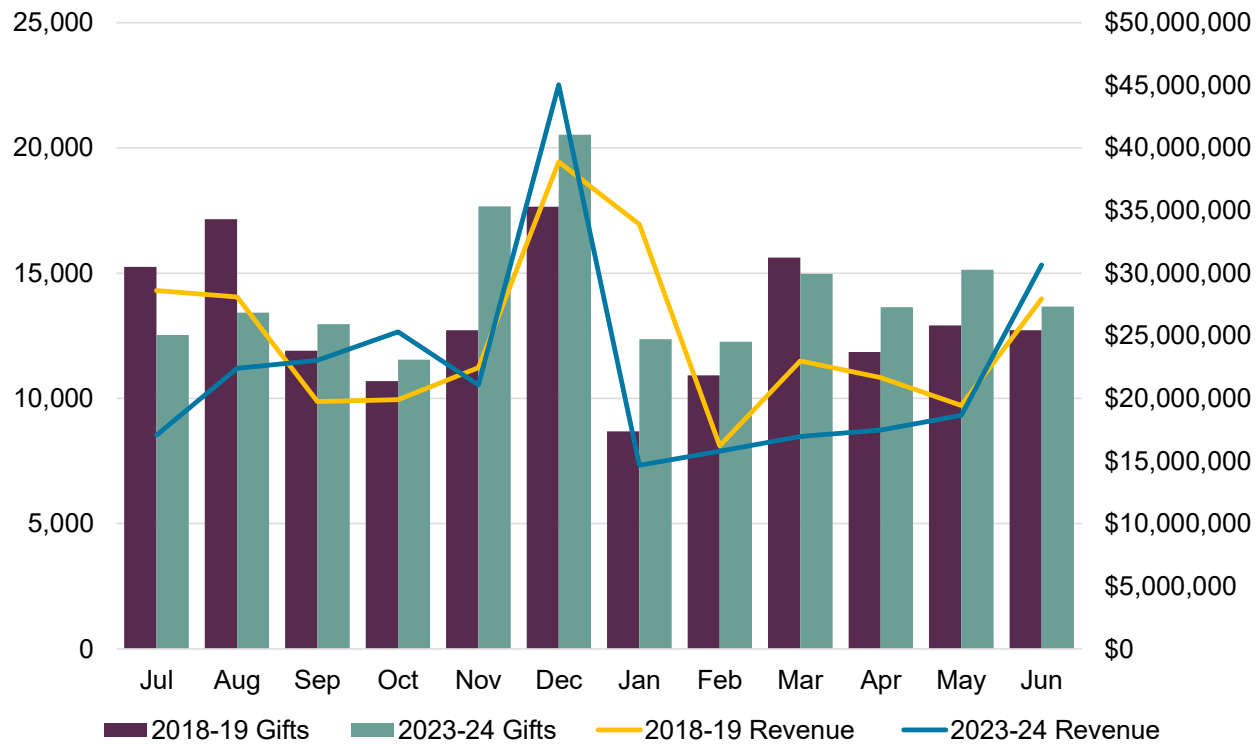
Gifts by Month: US Performing Arts Organizations

July 2018-June 2019 vs July 2023-June 2024



Gifts by Month: US Orchestras

July 2018-June 2019 vs July 2023-June 2024



What's Driving Donation Challenges?

Why are results so inconsistent?

Strength

Giving units up, though donations are smaller.

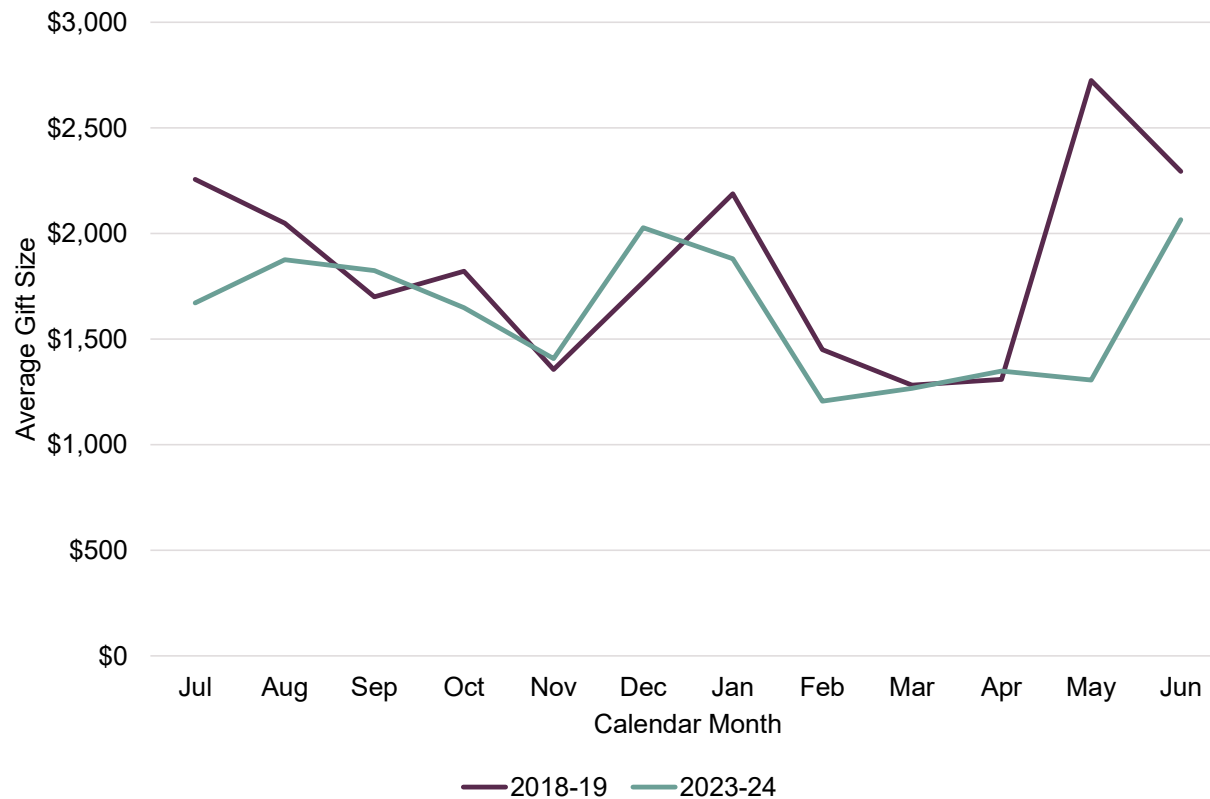
Opportunity

In 2024 only June saw higher gift revenue than pre-pandemic. How are we upgrading donors?



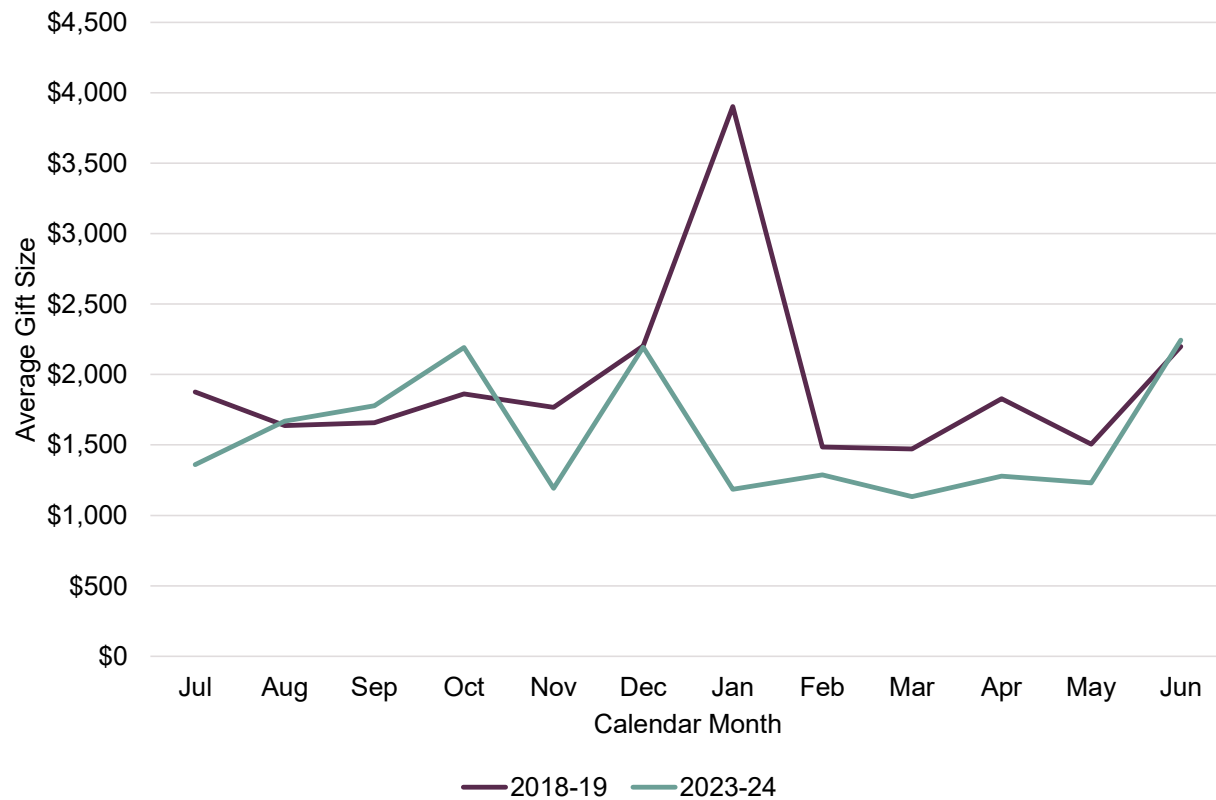
Ave Gift Size by Month: US Performing Arts Orgs

July 2018-June 2019 vs July 2023-June 2024



Ave Gift Size by Month: US Orchestras

July 2018-June 2019 vs July 2023-June 2024



Orchestras Ticket Retention



Industry New to File Single Ticket Buyer Churn Rates

18% Average Increase across the entire North American Benchmark



KILLER OFFERS 101:

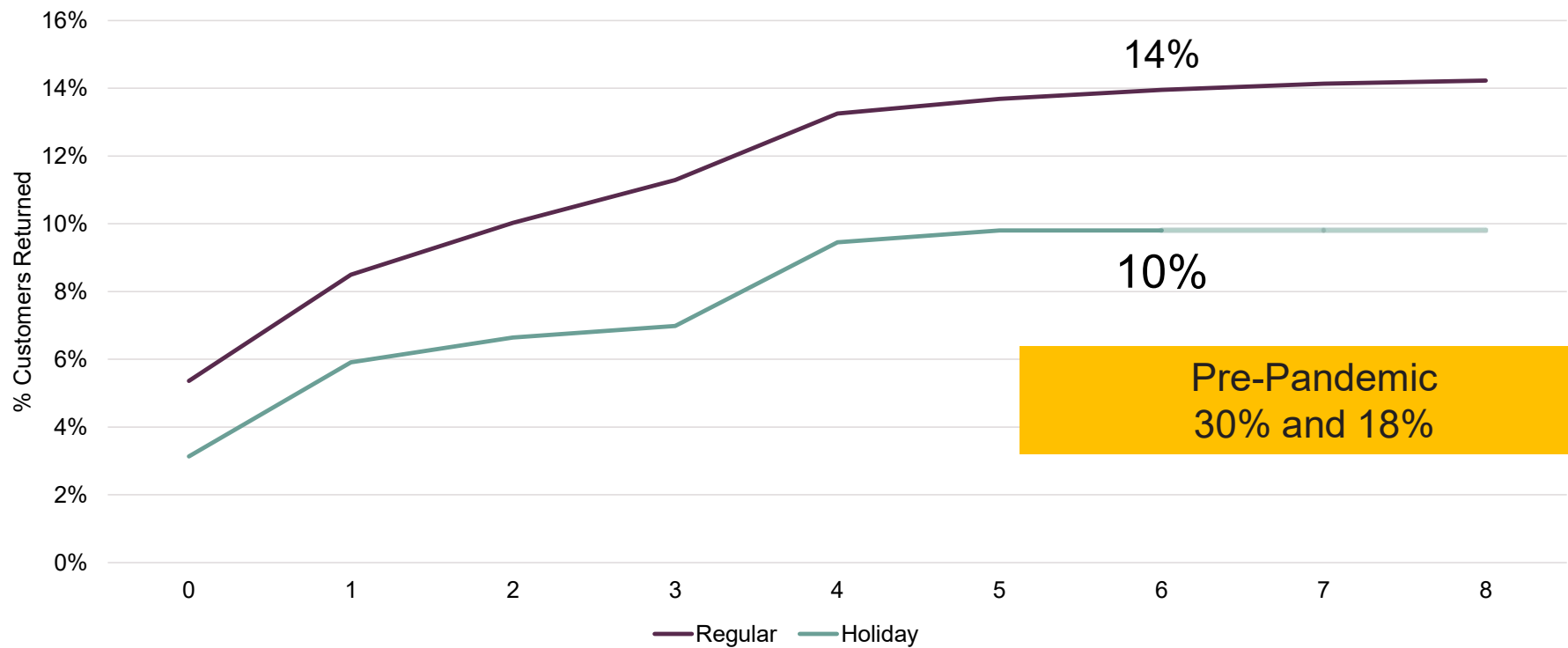
CREATE OFFERS

SO GOOD

**THEY SELL
THEMSELVES!**

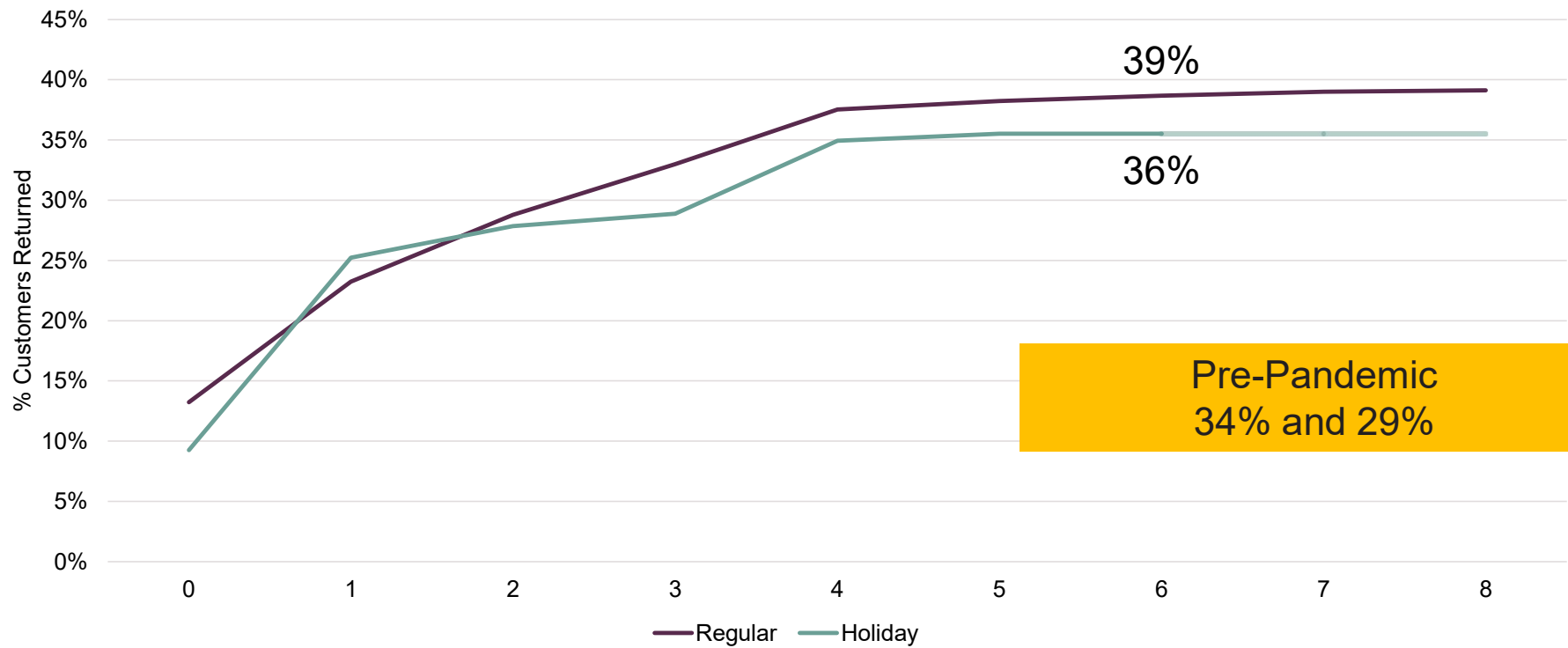
Rate of Return 2022 to 2024 Q1: US Orchestras

Post-Pandemic NTF - Quarters Between 1st and 2nd Visit



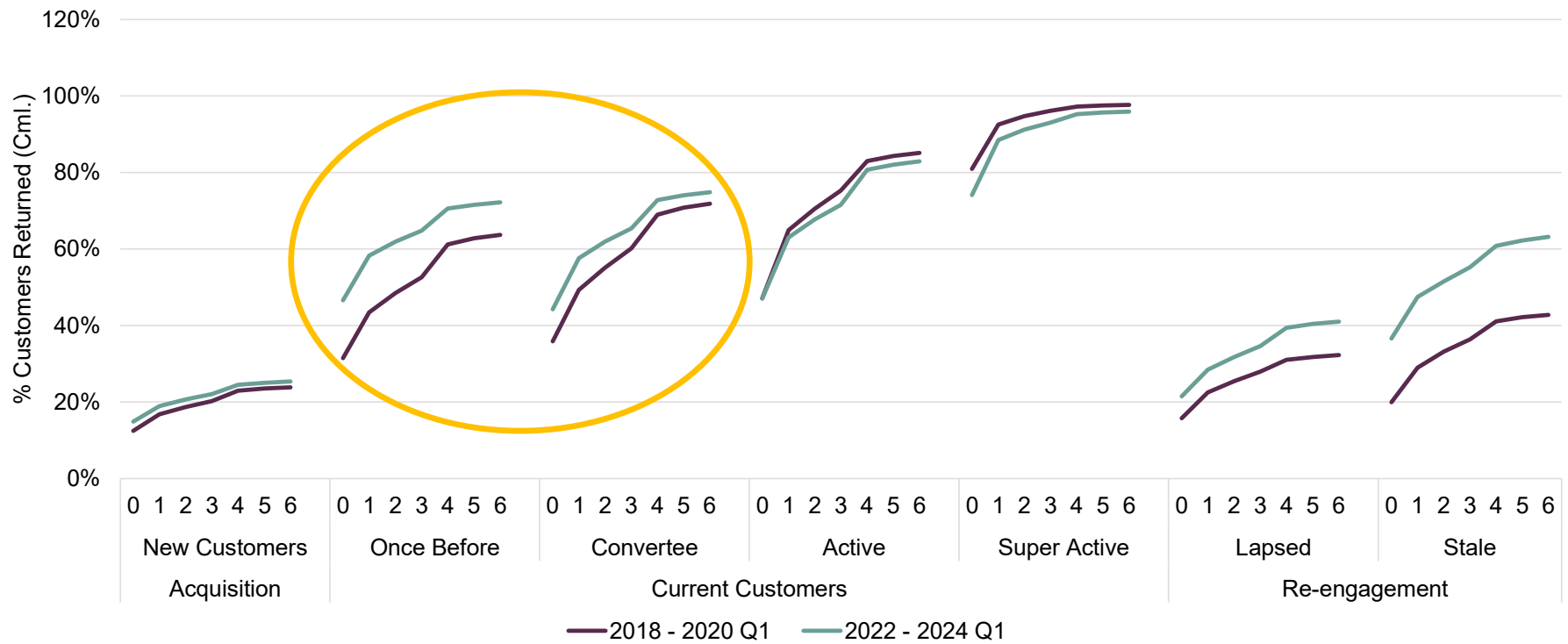
Rate of Return 2022 to 2024 Q1: US Orchestras

Post-Pandemic Existing Buyers - Quarters Between Visits



Retention by Segment: US Orchestras

Quarters to Return





Annuals



Biennials



Perennials



CONCERT

A circular graphic with a white border. The background shows a blurred audience of people clapping. In the center, the number '29' is written in a large, white, serif font. To its right is a white plus sign '+'. Below this, the word 'Concerts' is written in a large, yellow, serif font. At the bottom of the circle, the text 'FOR ONLY \$9/MONTH' is written in a smaller, yellow, sans-serif font.



MEMBERSHIP



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

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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

Non Profit Org
U.S. Postage
PAID
Little Rock, AR
Permit No. 2670

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

Membership
Plus

Concert
Membership

\$9 / Month

B & C Level Seating

Access To:

- All Pops
- All Masterworks
- Most Chamber

*Excludes Two Artist of
Distinction Concerts

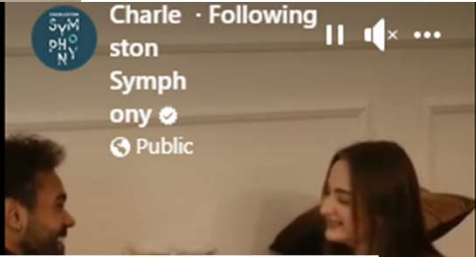
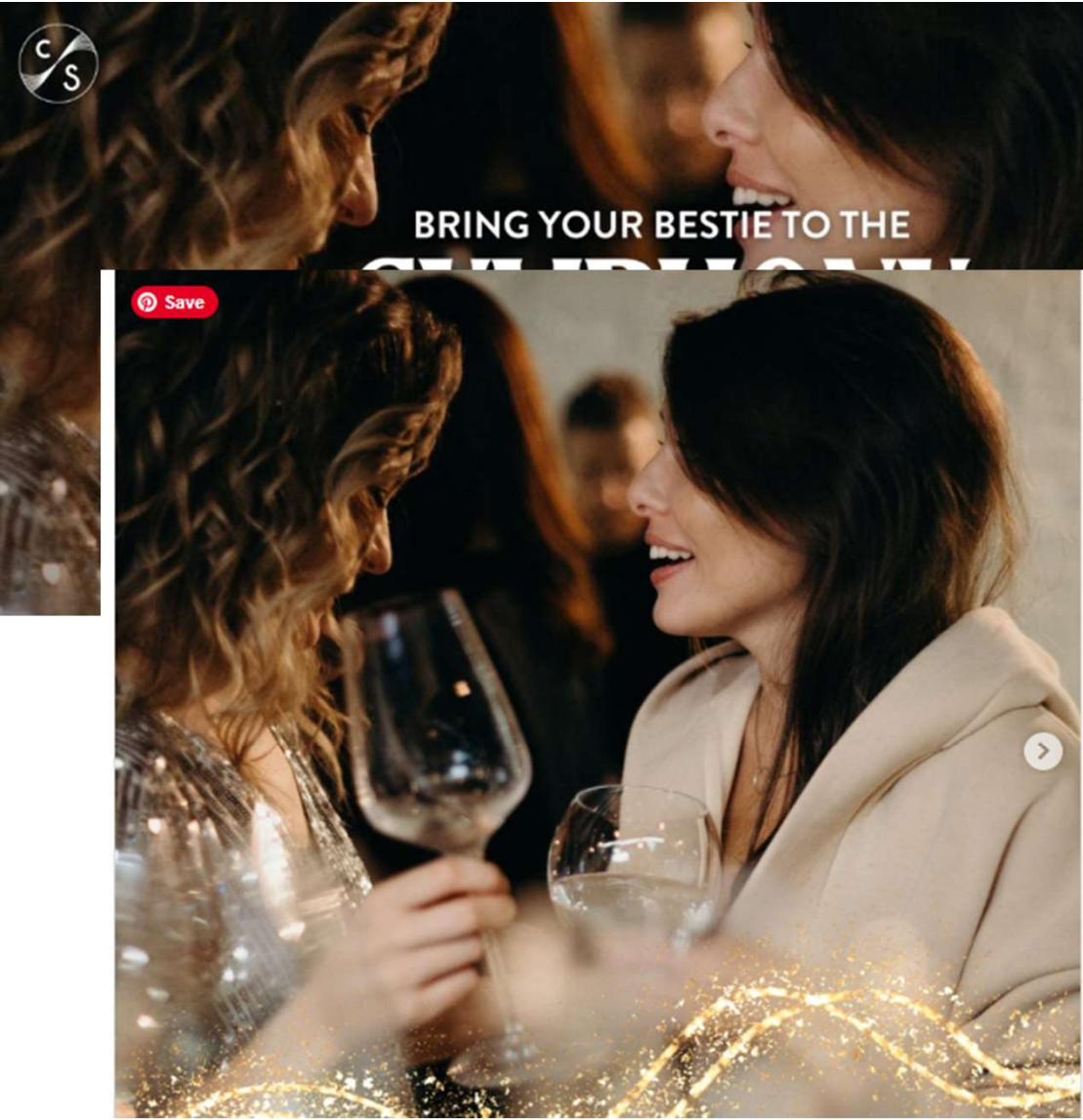
Concert
Membership Plus

\$18 / Month

A, B, & C Level Seating

Access To:

- All Pops
- All Masterworks
- All Chamber



charlestonsymphonyorchestra · Following ...
Gaillard Center

charlestonsymphonyorchestra 30w
We are thrilled to officially launch our Bring Your Bestie to the Symphony campaign at our upcoming concert, Majestic Bruckner!

Here's how it works: for every Bruckner ticket you purchase with code BESTIE, you can bring a friend for free! And that's not all - you'll also get a free glass of wine or prosecco to enjoy with your friend. 🍷

This special, limited-time offer ends on Nov 10th, 11:59pm ET. To purchase your tickets, click on the link in our bio. We can't wait to see you there!

...

Liked by berylbyayiku and others
November 3, 2023

Youngest Classical audience, after *The Planets*.

Most racially diverse Classical audience of the 23-24 season.





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





Eric Nelson
VP, Global Partnerships
enelson@trgarts.com
917.561.5243

