

Benchmark Briefing:

North American Arts Trends Shaping 2026



Presented March 11, 2026
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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 the US, Canada, the UK, and Ireland.

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Data Summary:

Total North American Orgs: 163

- **Data shown in calendar years**
- **All revenue data for 2018-2024 has been adjusted for inflation based on Dec 2025**
- **Orgs must have data every year 2018 – 2025**
- **Includes comps**
- **Best efforts made to exclude non-event transactions**

**North
American
Benchmark**

Key Metrics

Can you name the relationships and behaviors behind your revenues?

When you segment by relationship and **describe revenue from the audience behaviors up**, you don't just have a bottom-line; you understand exactly how you got there.

Going forward... If your budgets are built on one-dimensional hope instead of people, you're not planning; you're gambling.





Be listening for & reflecting on...

Confirmations

Challenges

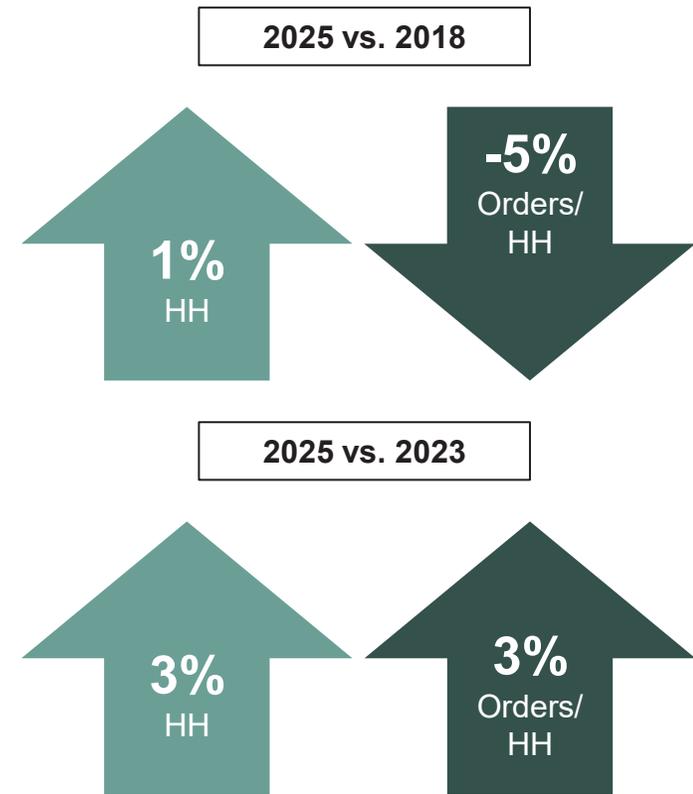
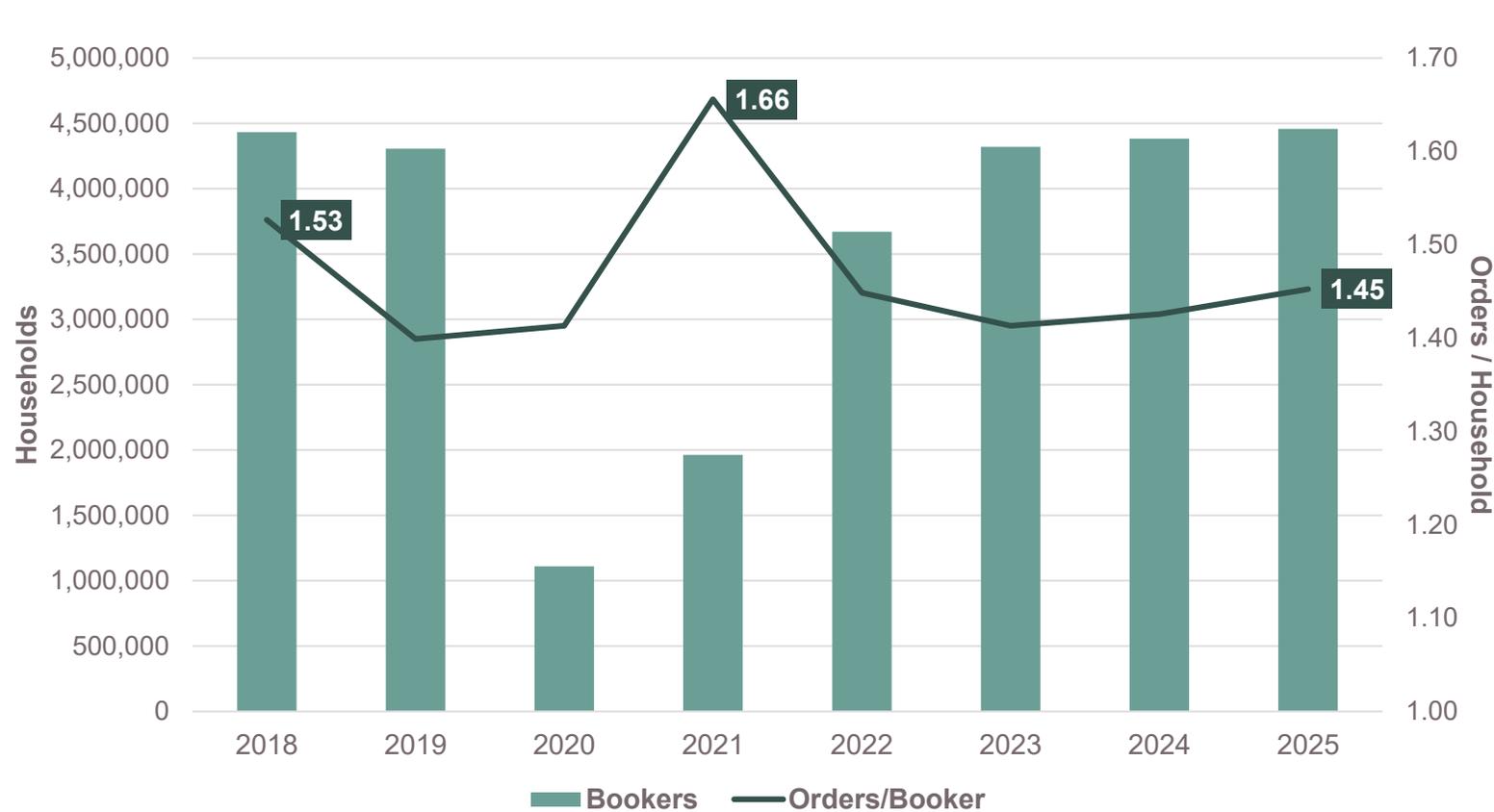
Insecurity

Actions

Single Ticket Transactions

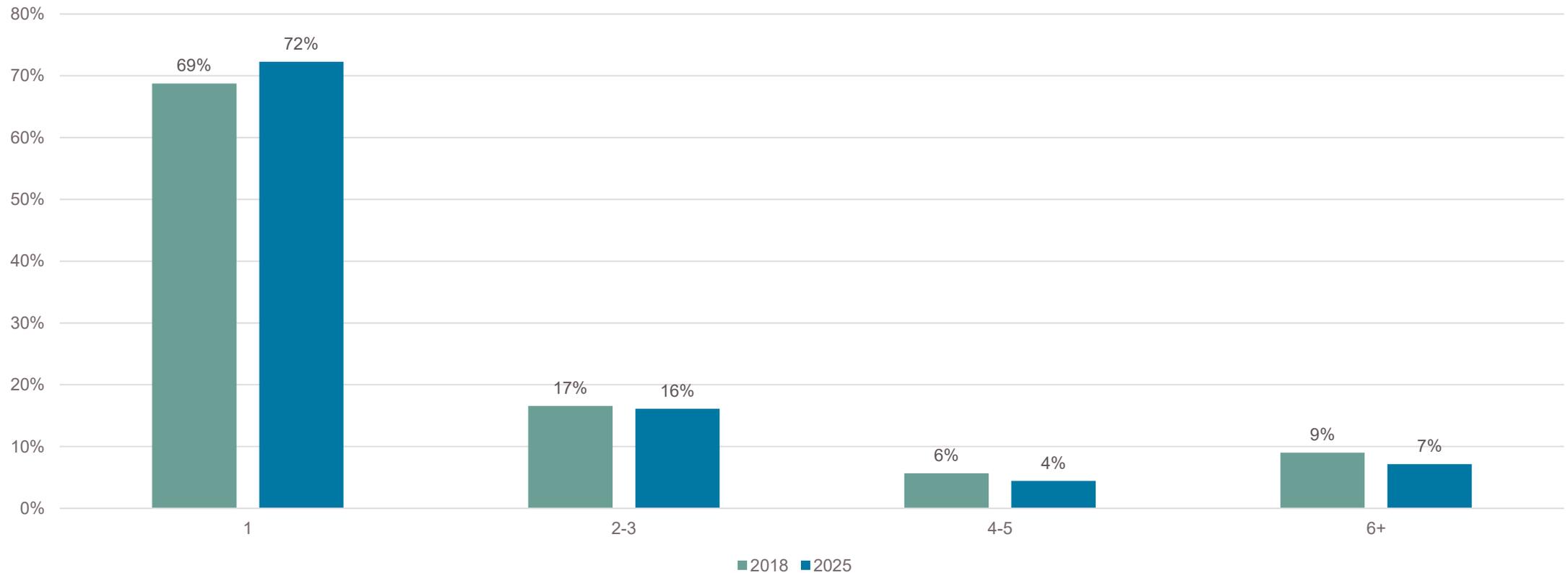
Households & Orders Per Household

Household volume and average orders per year have exceeded pre-pandemic levels



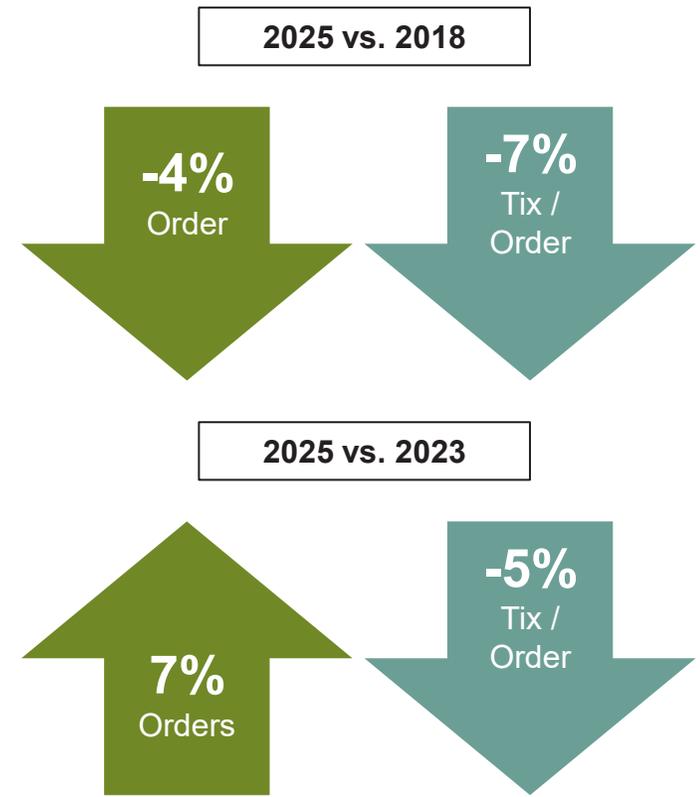
Single Ticket Buyer Annual Frequency

Proportion of households visiting once has grown, large declines in HHs with 4+ visits



Orders & Tickets Per Order

Frequency declines lead to fewer orders, and average tickets per order declines steadily



Per Capita Revenue (Average Ticket Price Paid)

Per Capita revenue has grown faster than inflation



2025 vs. 2018

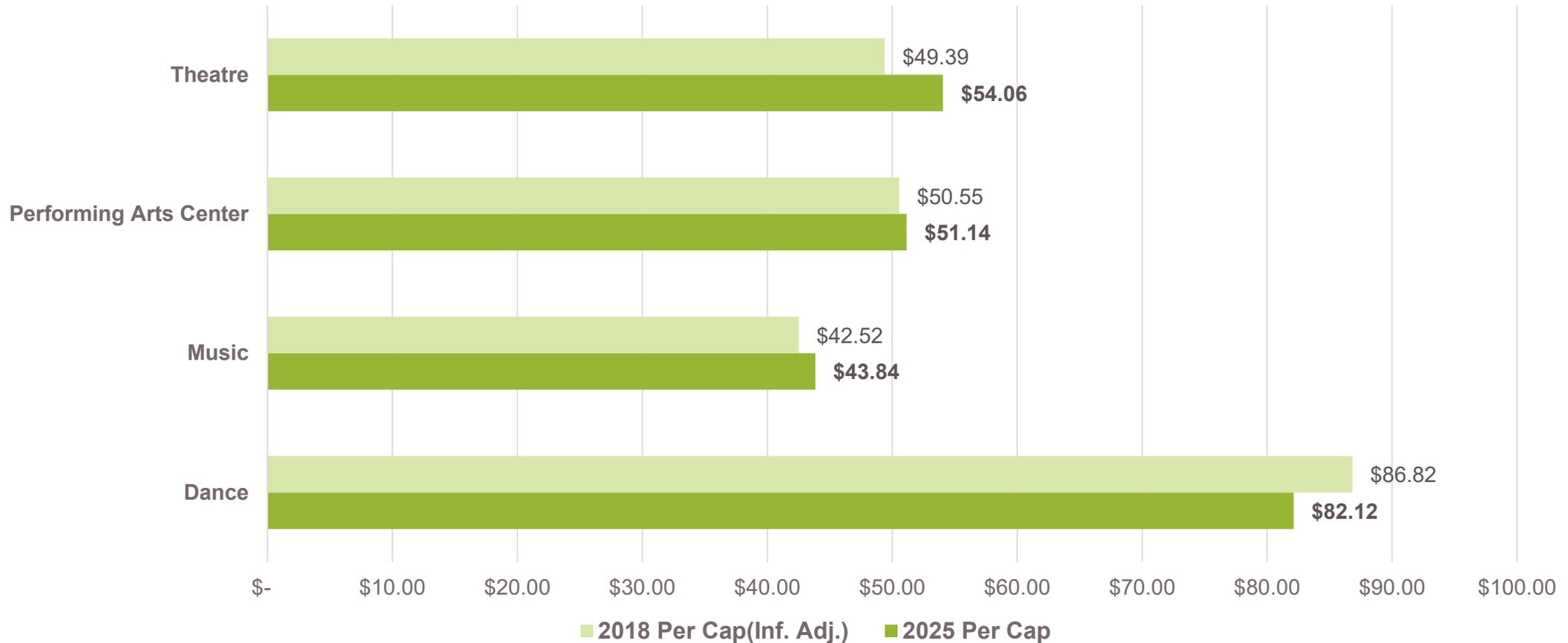


2025 vs. 2023



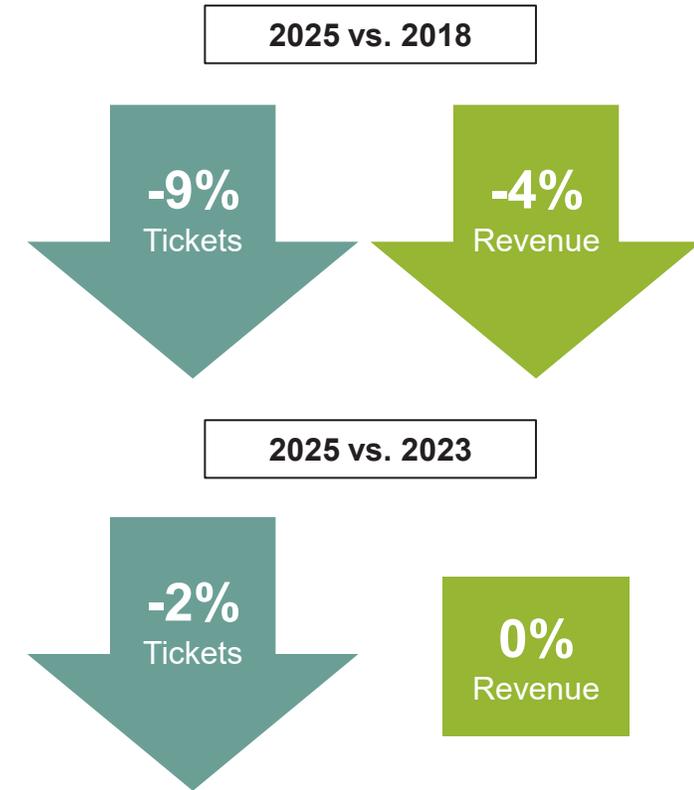
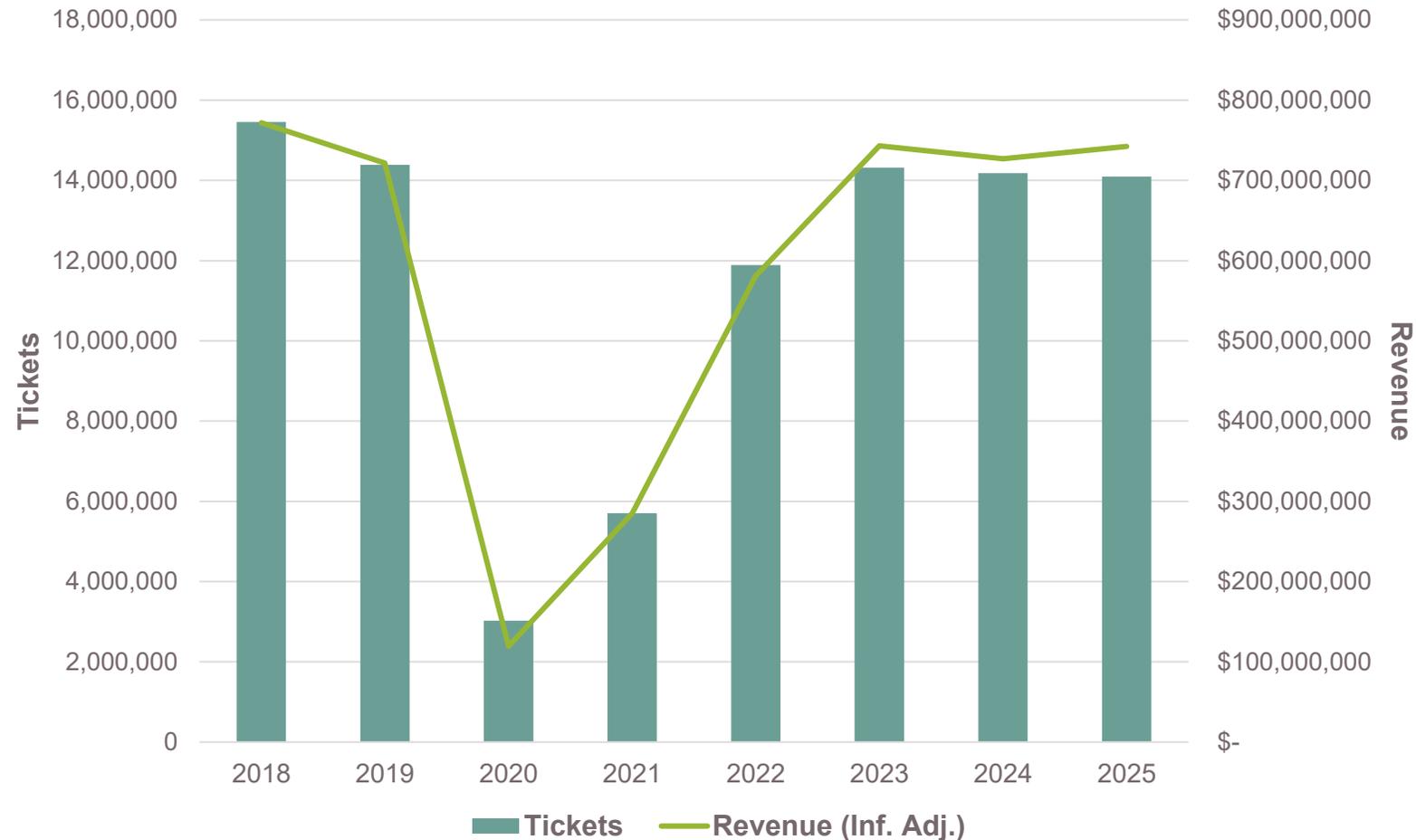
Per Capita Revenue by Benchmark Genre

Dance per capita revenue has not kept pace with inflation, other genres have exceeded

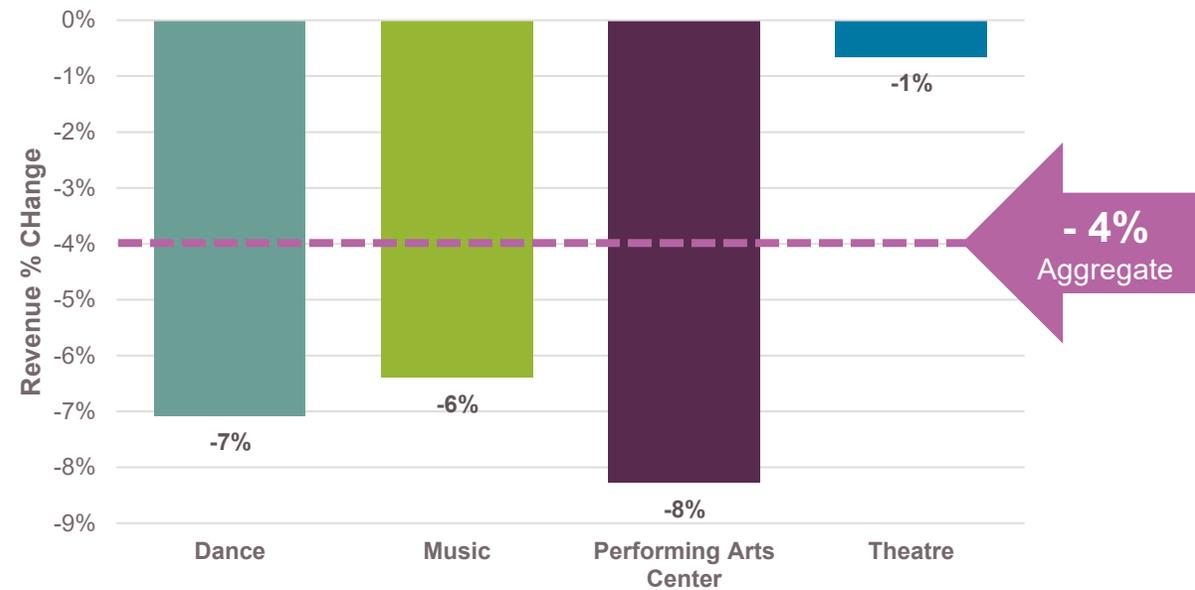
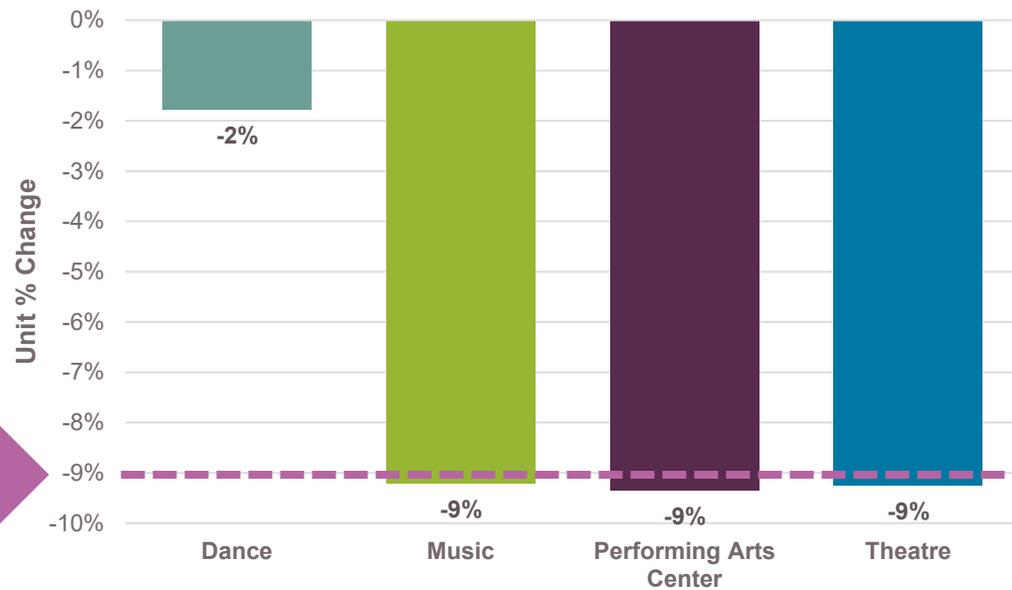


Total Ticket & Revenue Summary

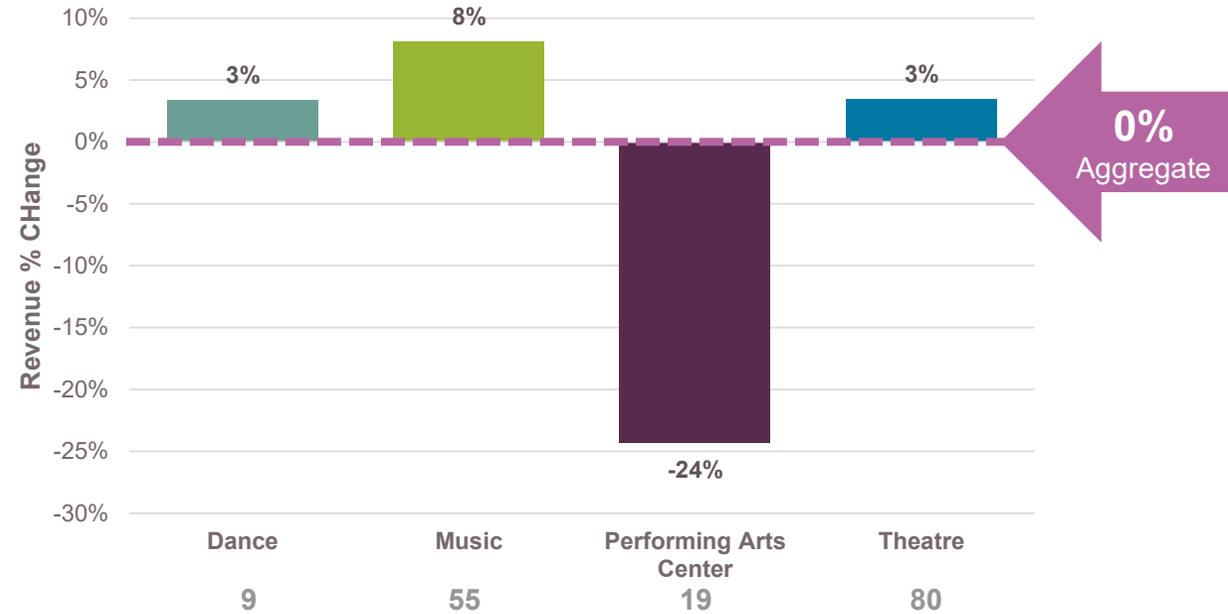
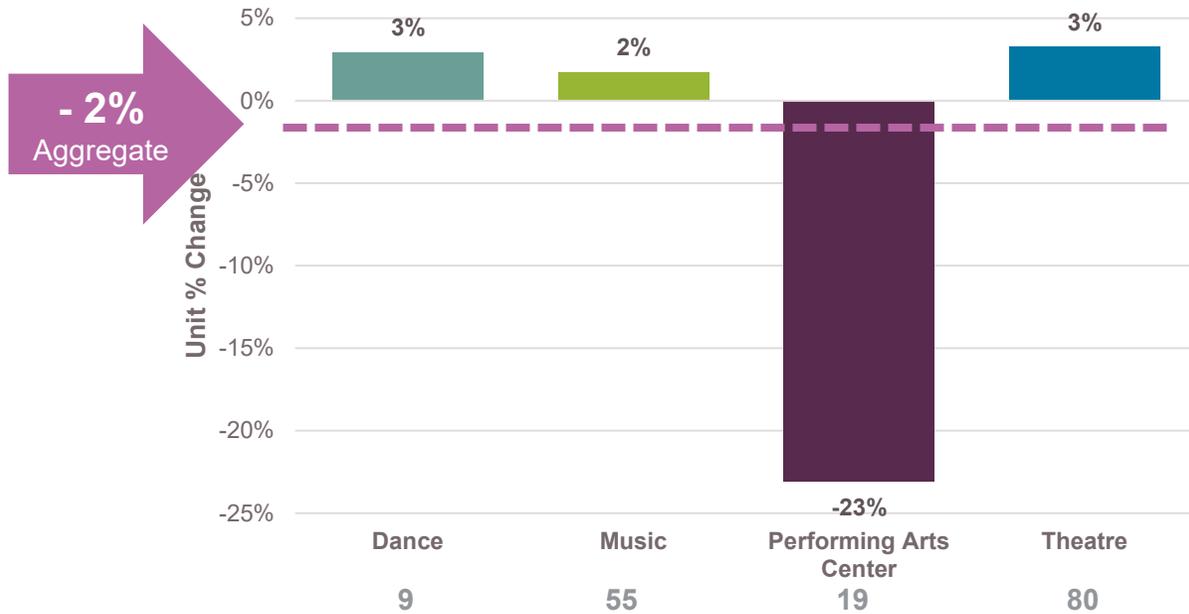
In aggregate, total ticket sales and revenues still lag pre-pandemic



Unit & revenue change by genre (ST) 2018 vs 2025



Unit & revenue change by genre (ST) 2023 vs 2025





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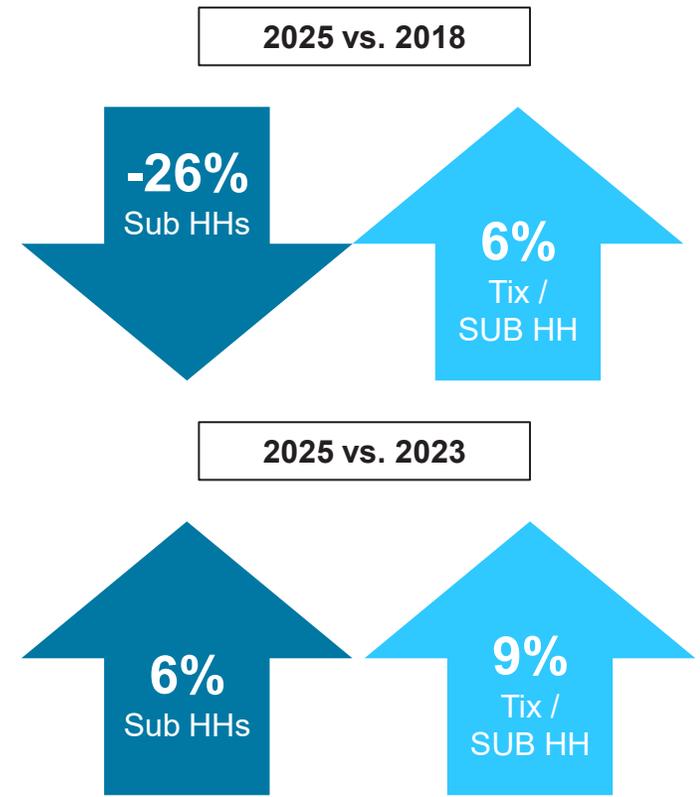
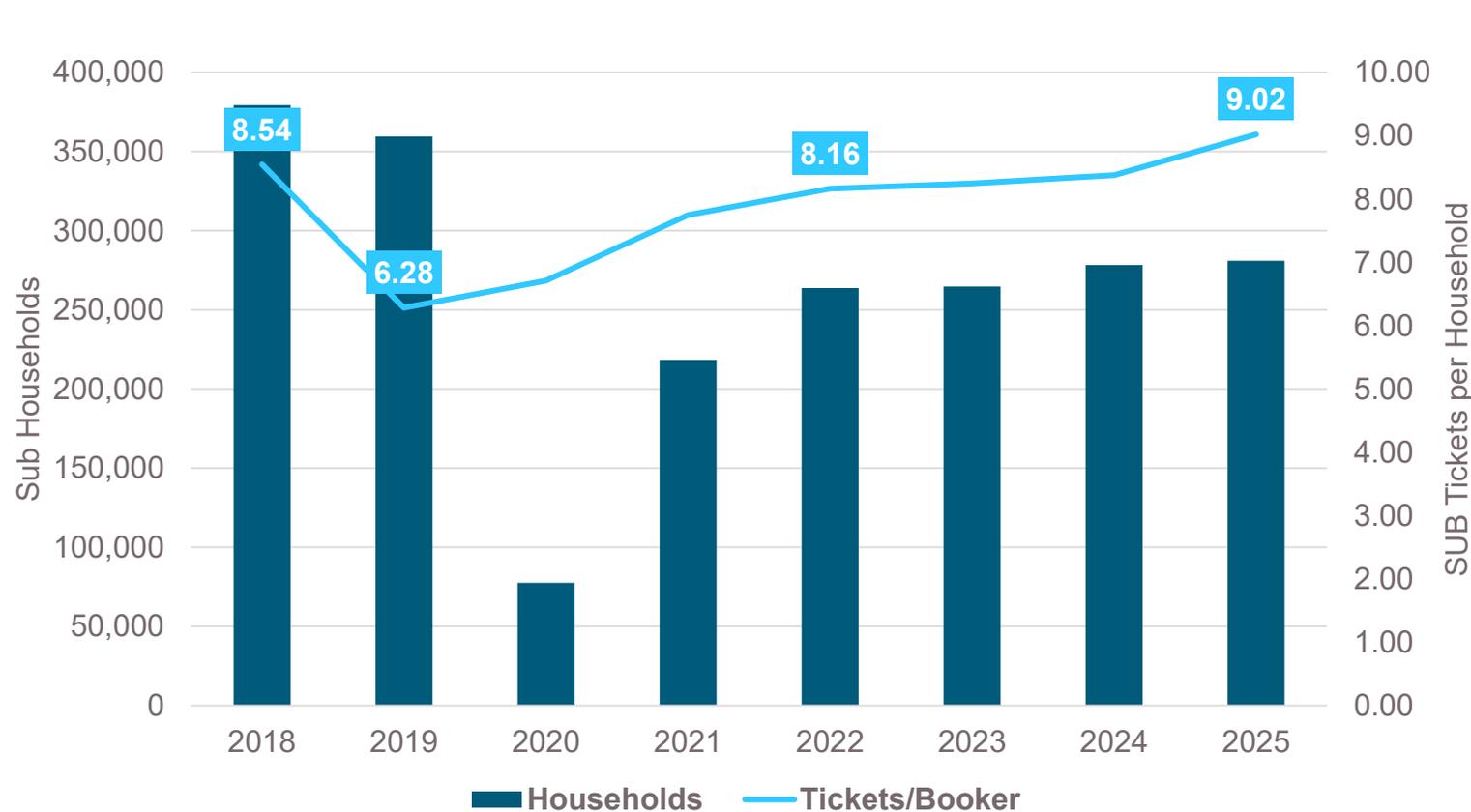
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Subscription Transactions

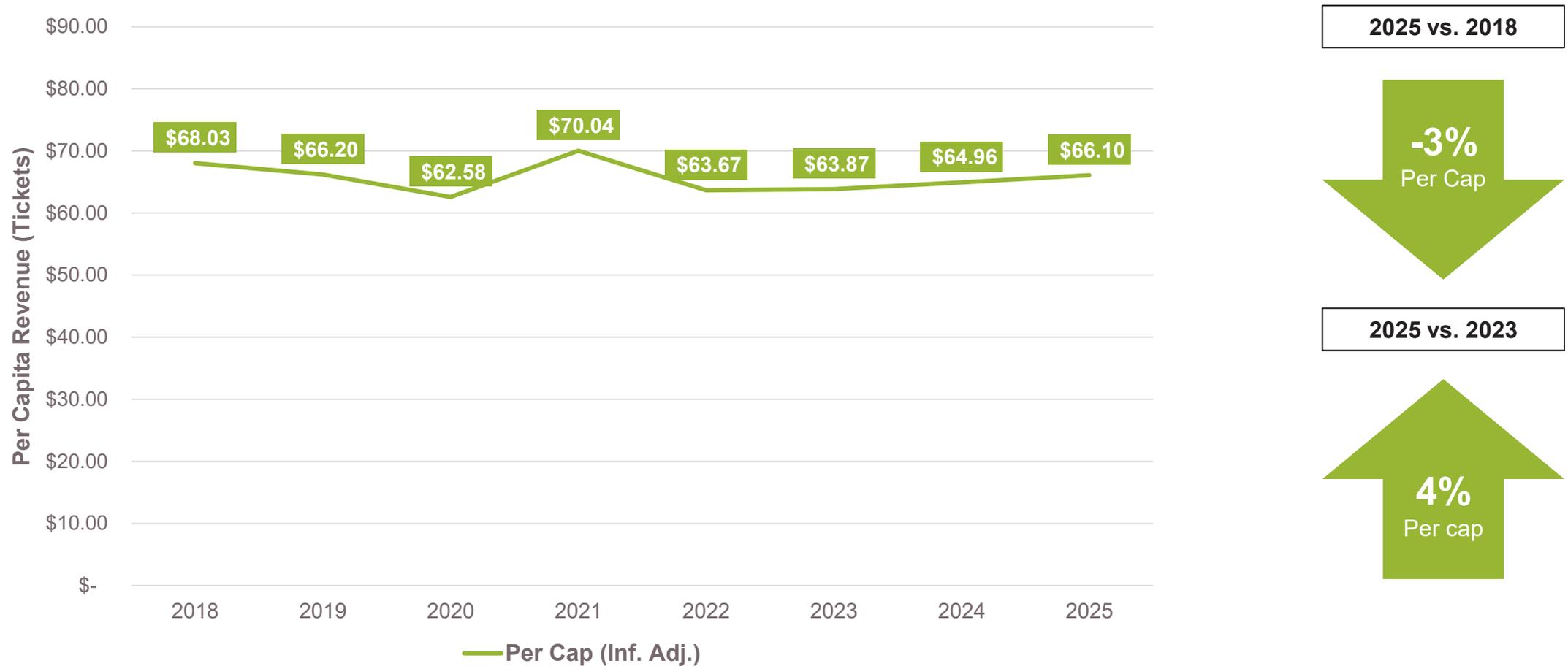
Subscriber Households and tickets

Household growth has been slow, but tickets per HH grew significantly in 2025



Subscriber Per Capita Revenue (Average Ticket Price Paid)

Per Capita revenue has not kept pace with inflation since the pandemic



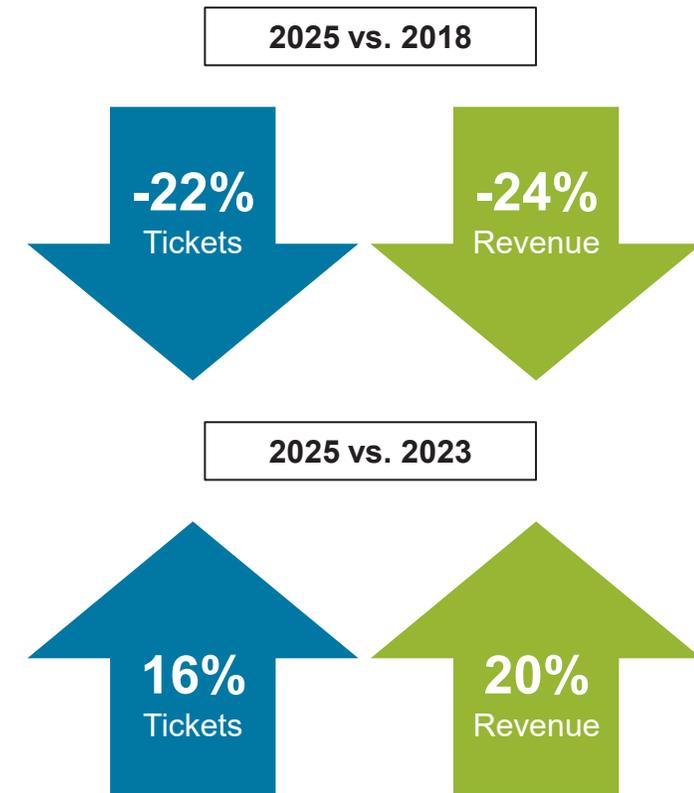
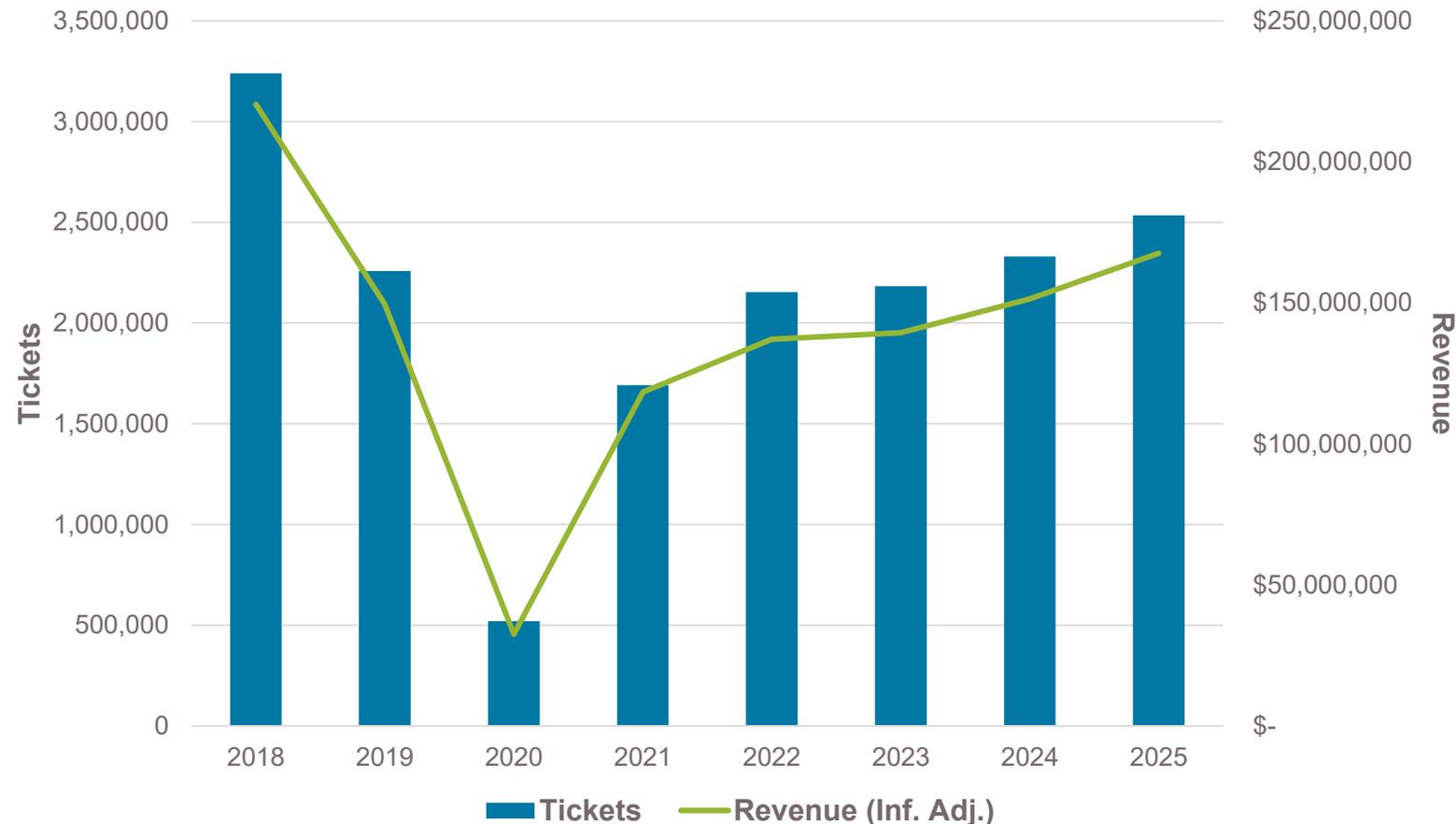
Per Capita Revenue by Benchmark Genre

Most genres are the behind inflation – their 2025 per caps lost value vs. 2018

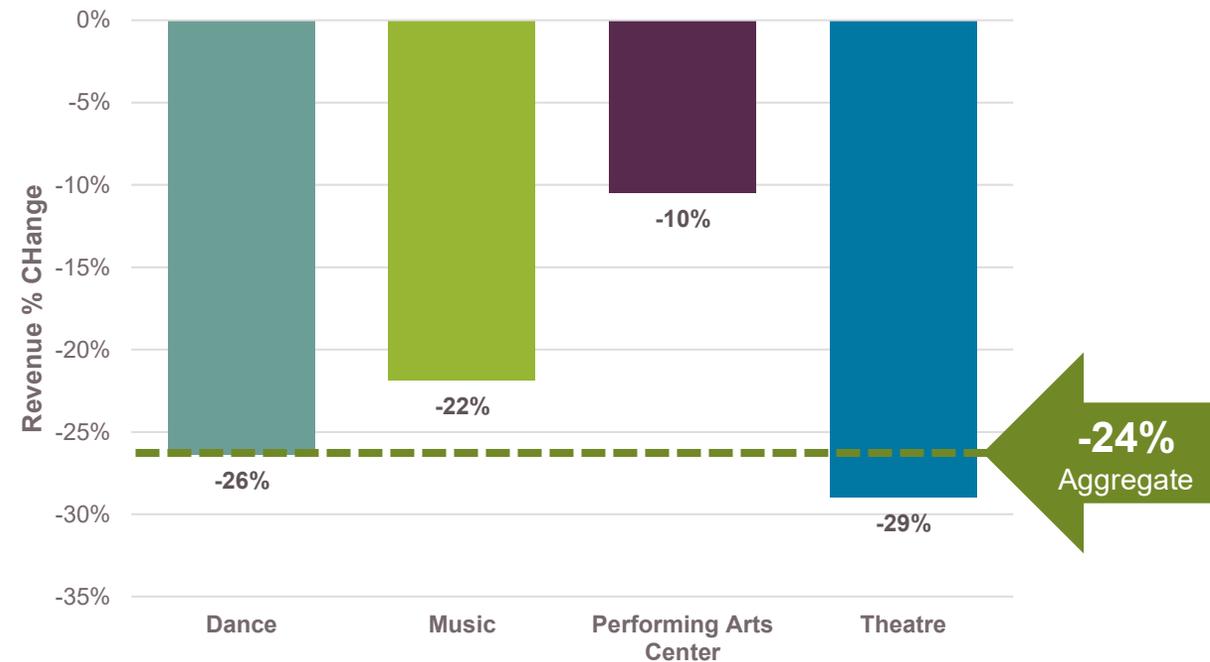
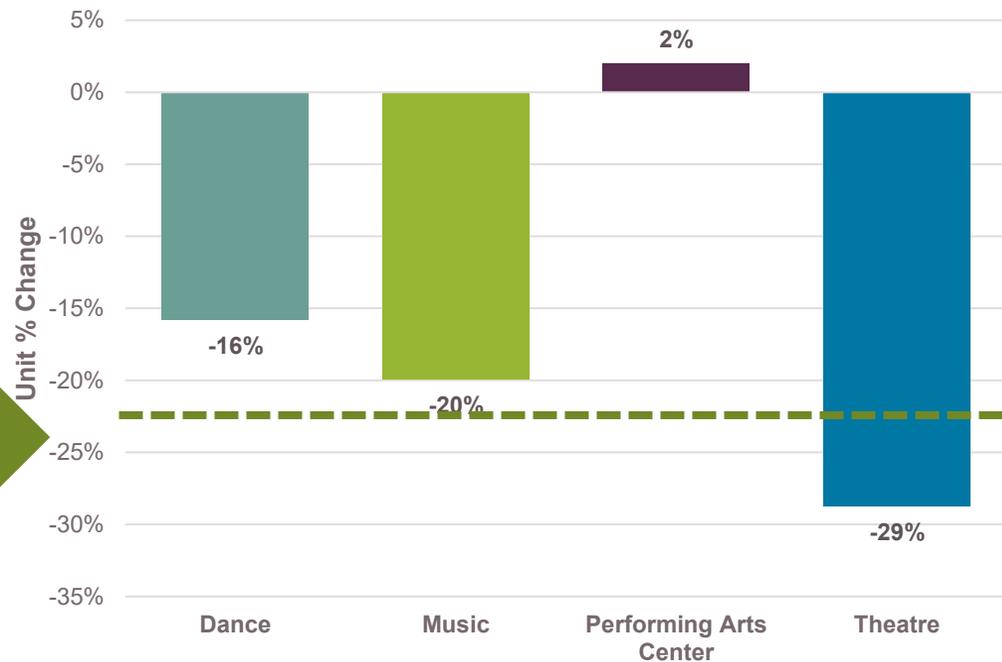


Total Subscription Ticket & Revenue Summary

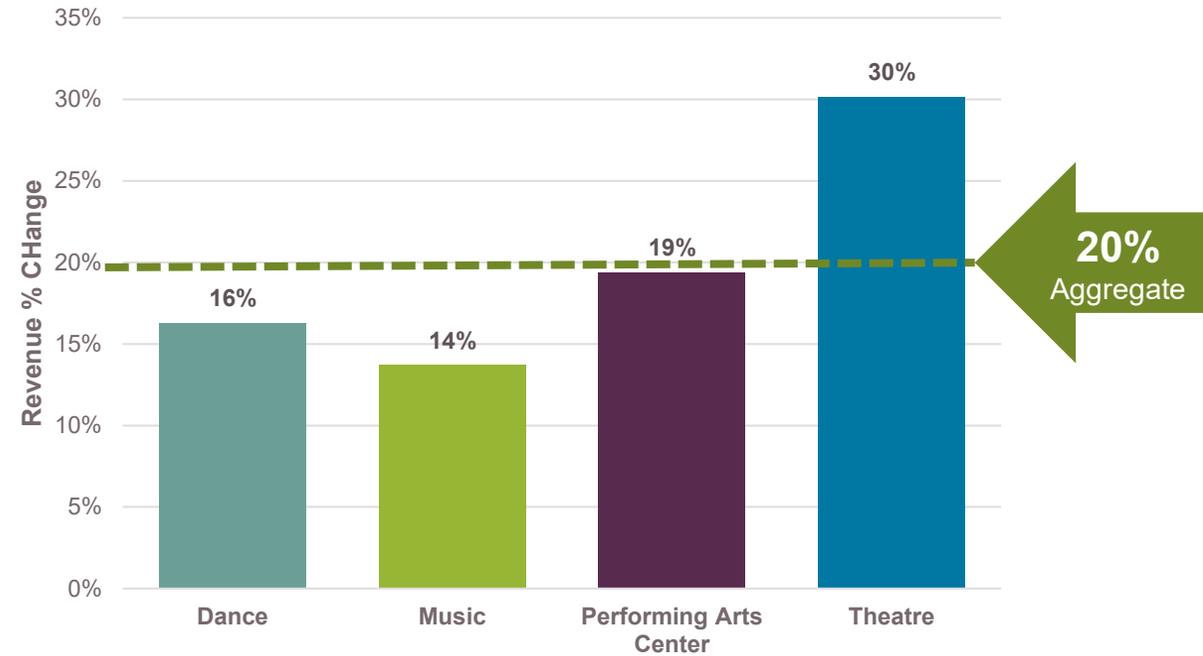
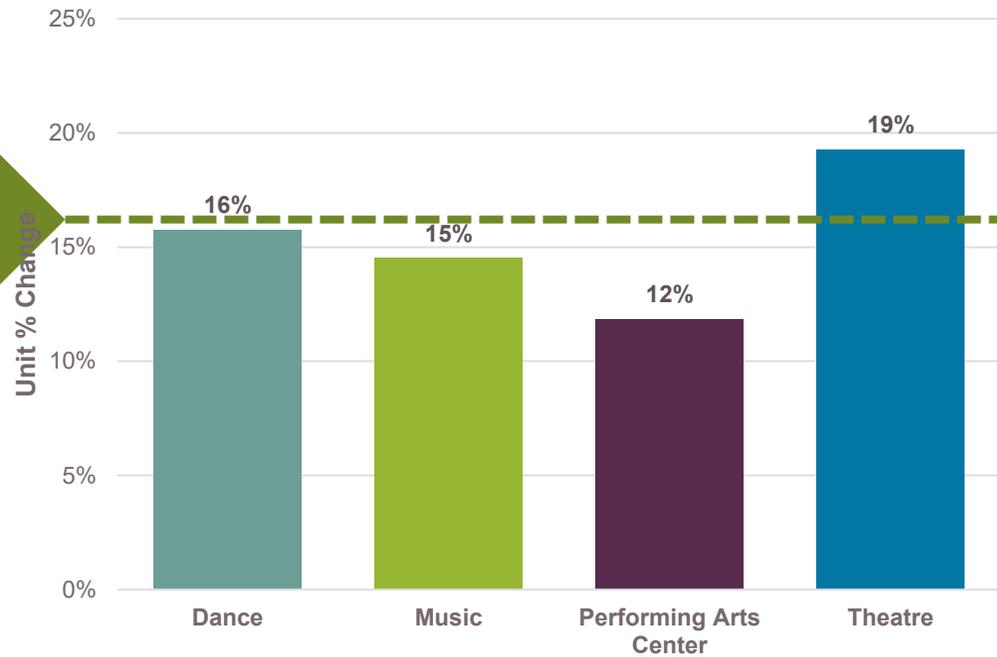
In aggregate, total ticket sales and revenues still lag pre-pandemic



Unit/Revenue change by genre (SUB) 2018 vs 2025



Unit/Revenue change by genre (SUB) 2023 vs 2025





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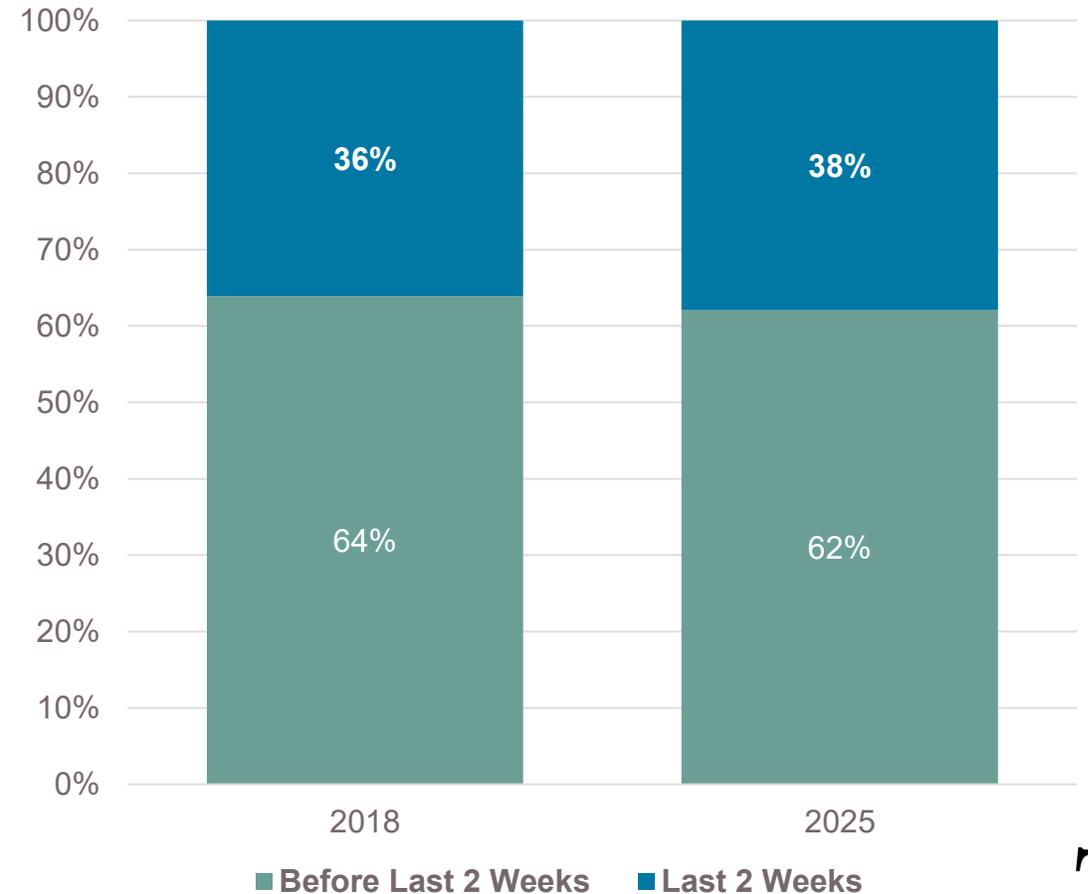
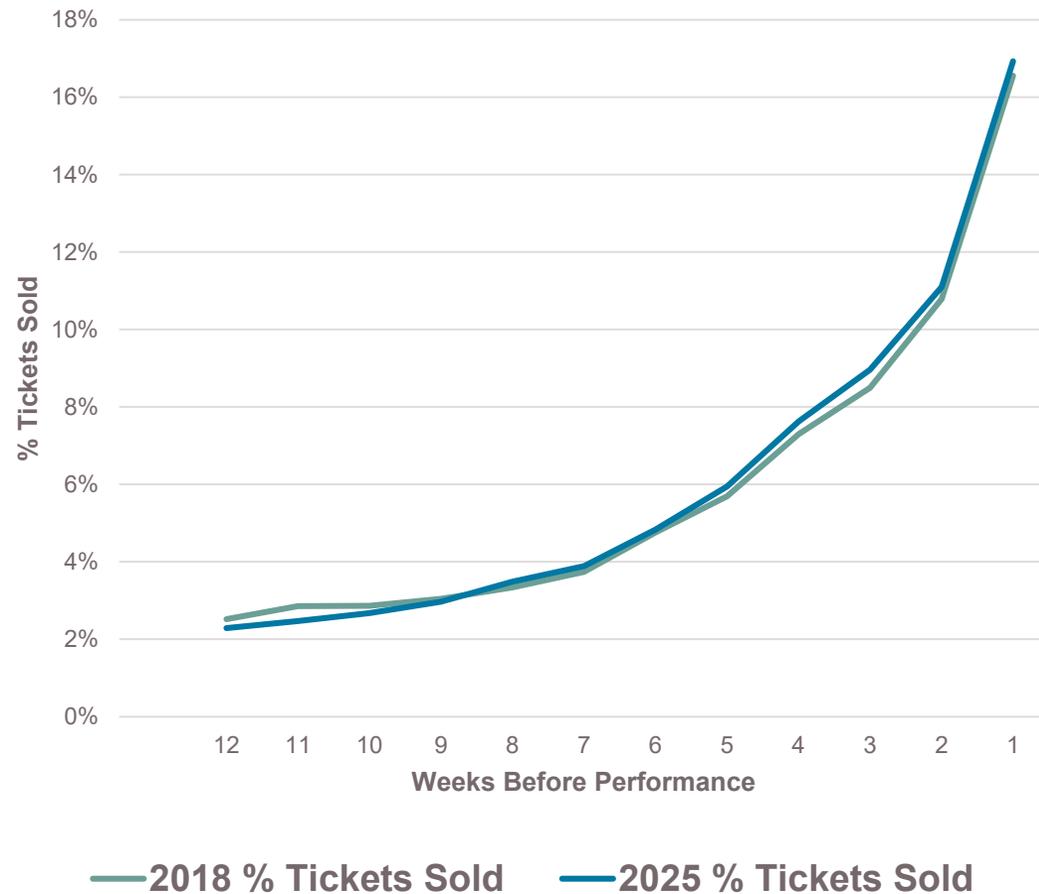
Insecurity

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Ticket Buyer Household Behavior

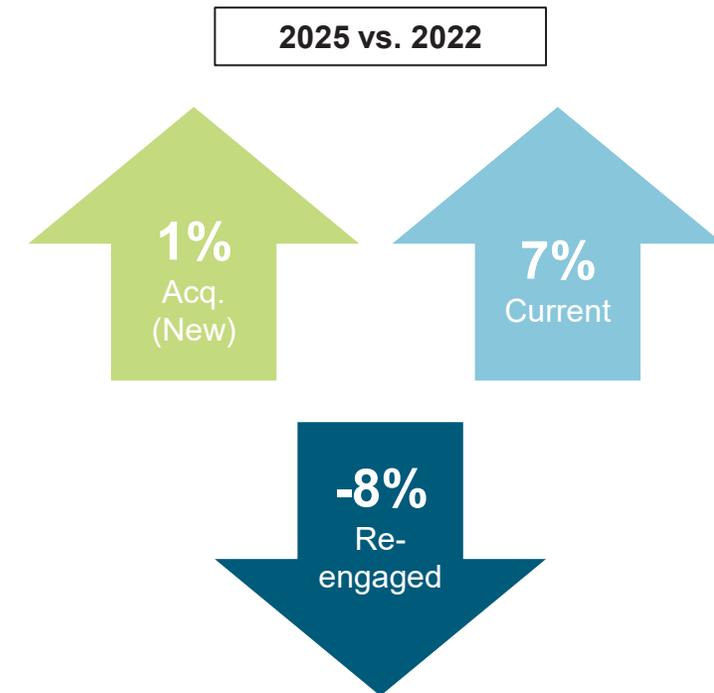
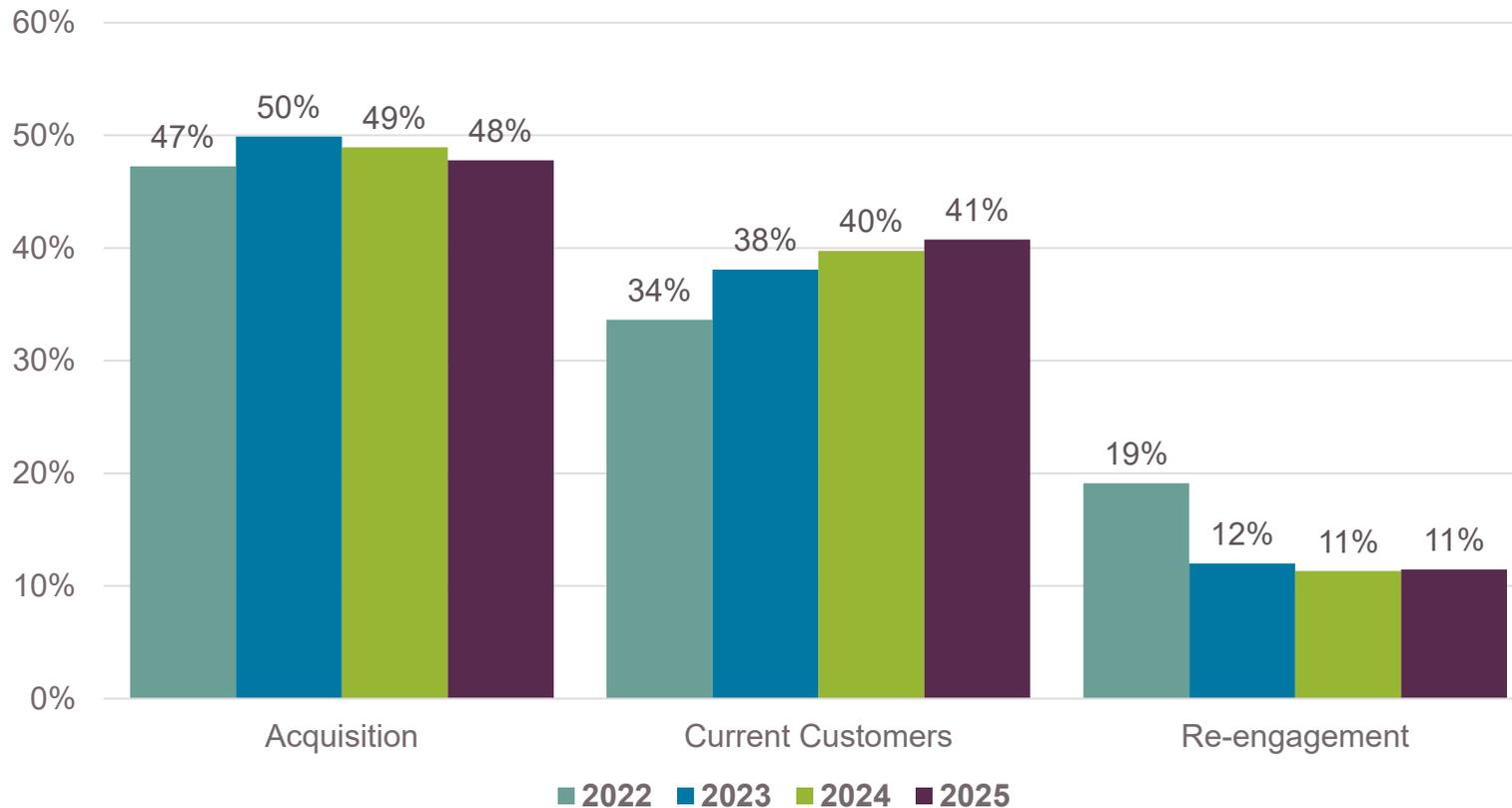
Ticket Purchase Timing

2025 bookings have been similar to 2018, slight increase in bookings within 2 weeks



Behavioural Segmentation

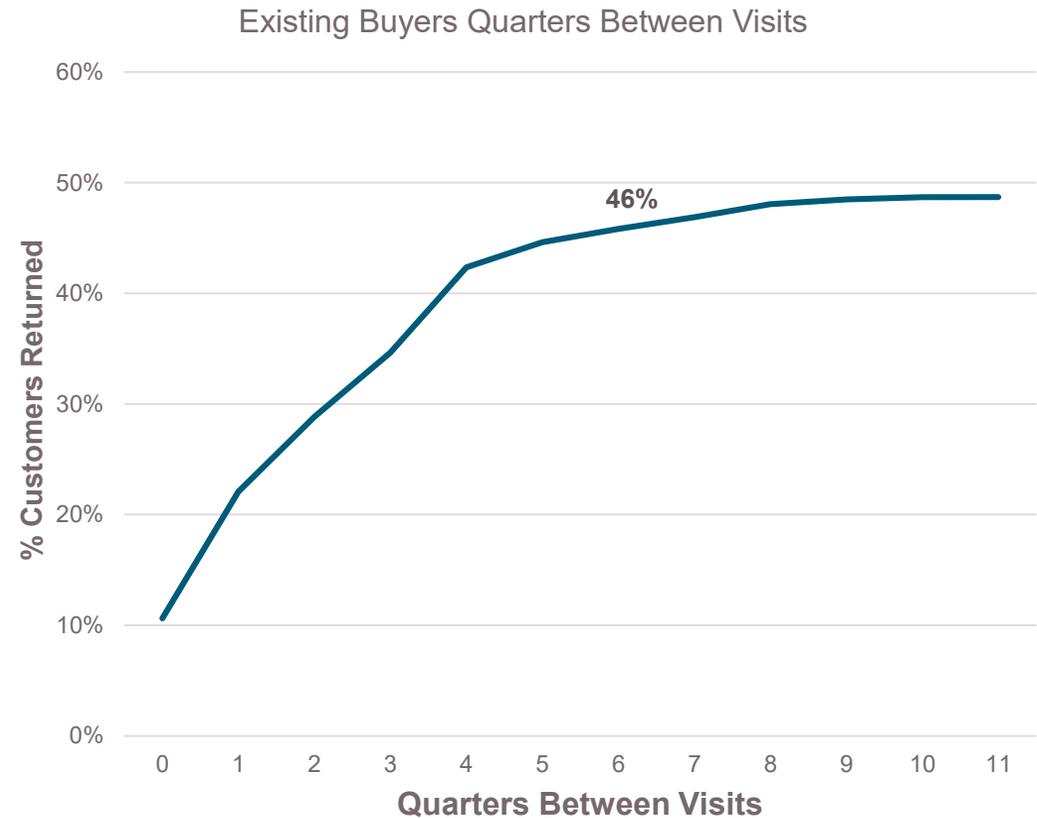
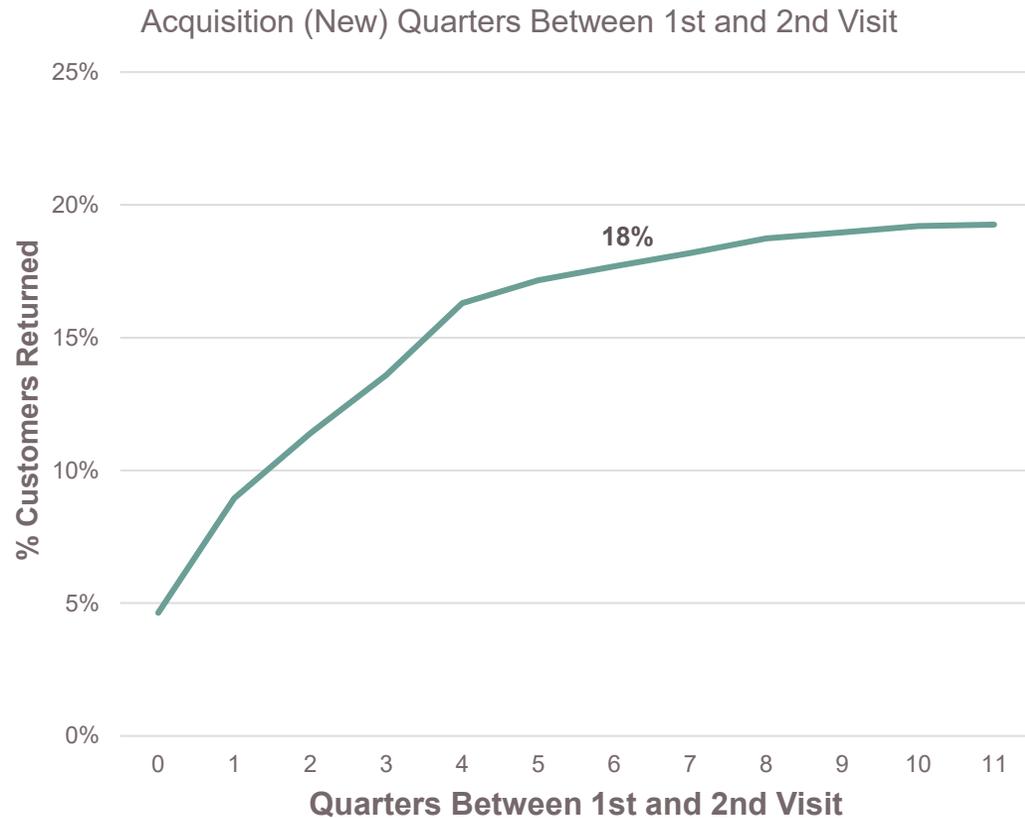
Consistently, about half of ticket buyers have an existing relationship with the venue



- **Acquisition** customers are making their first purchase (as best we can tell)
- **Current** customers have another booking within 18 months
- **Re-engaged** (reactivated) customers last booked > 18 months ago

Rates of Return by Segment

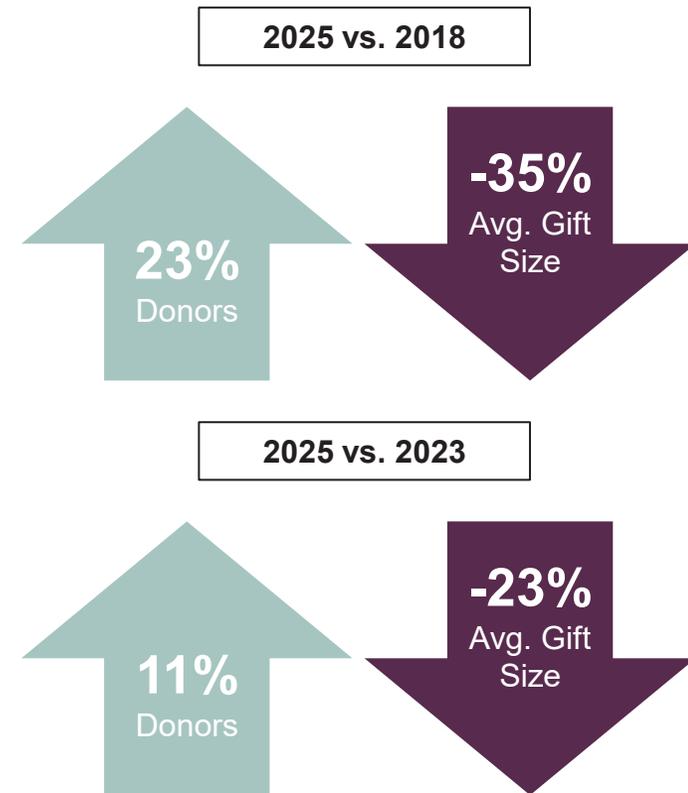
Existing bookers are 2.5x as likely to return within 18 months



Philanthropy

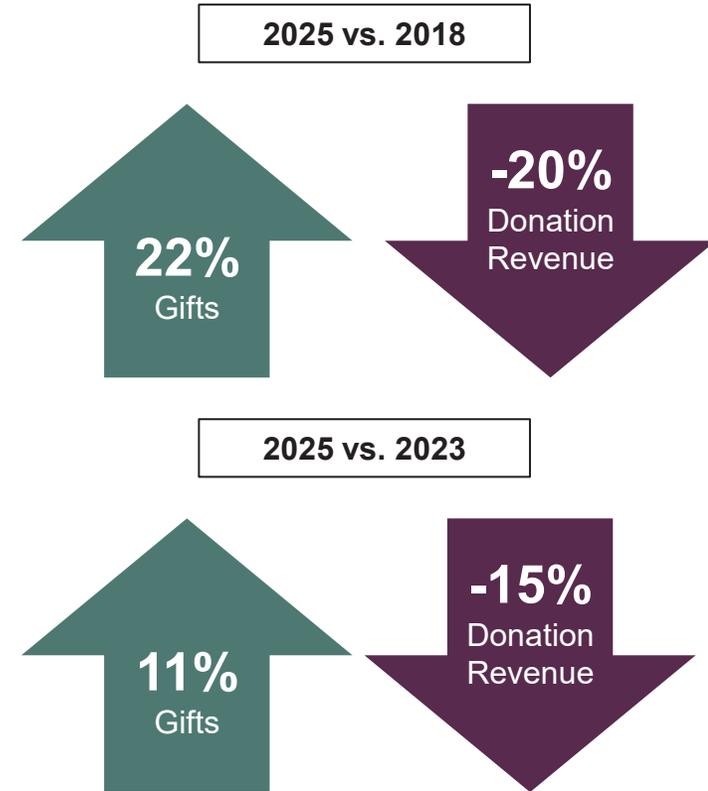
Donors & Average Gift Size (Inflation Adjusted)

Donor volume has grown; gift sizes fluctuate, but the 8-year trend is decreased



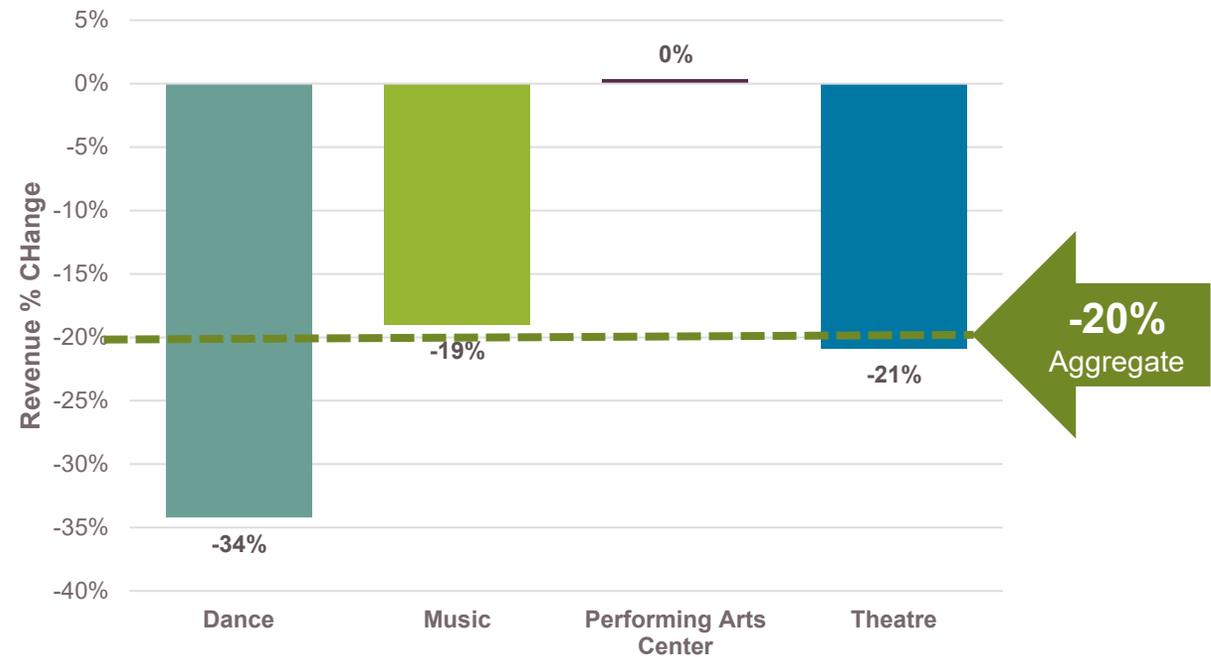
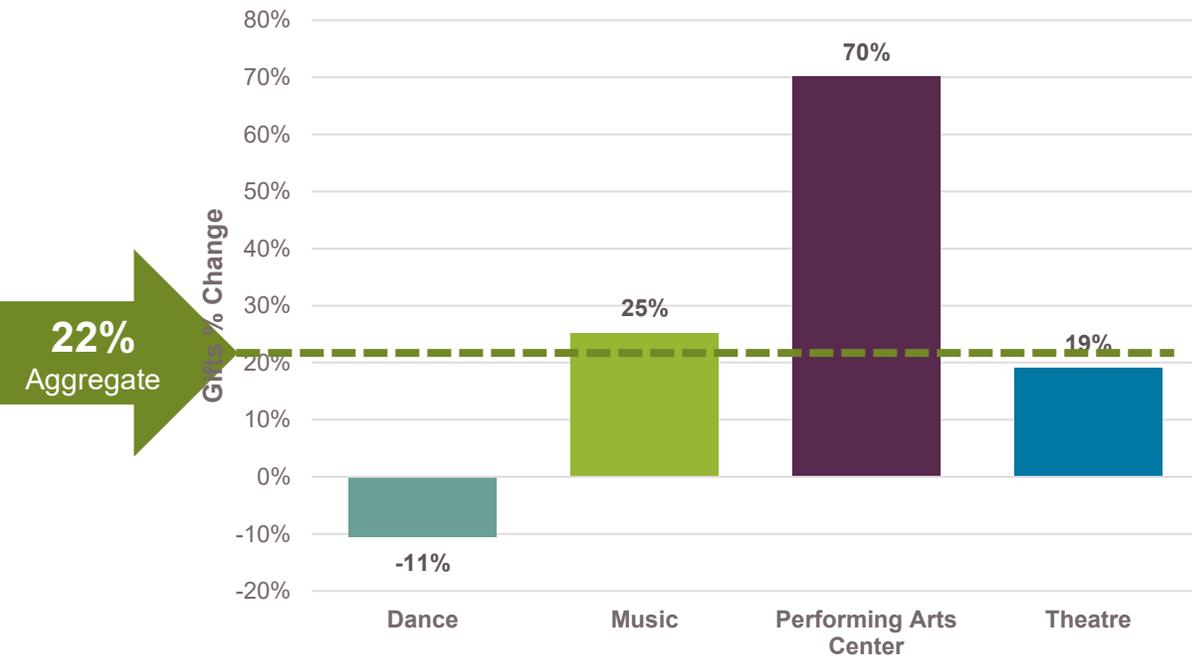
Gifts & Donation Revenue (Inflation Adjusted)

Donation revenue is growing with gifts, but revenue dips in '24 and '25 raises concern



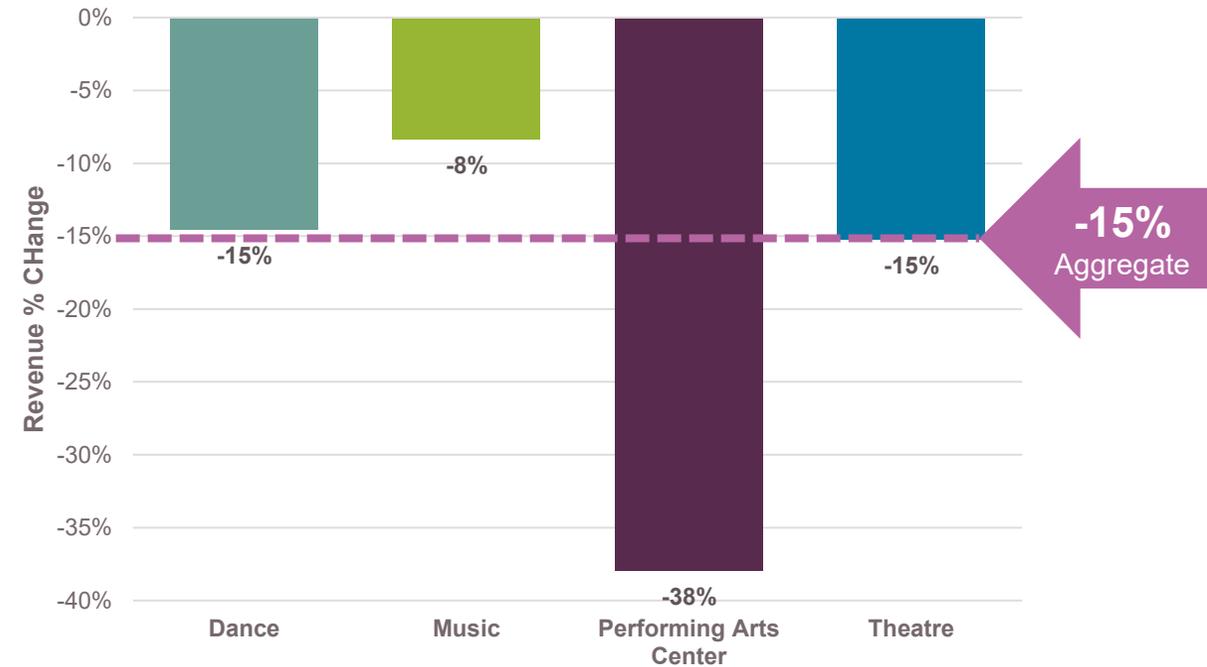
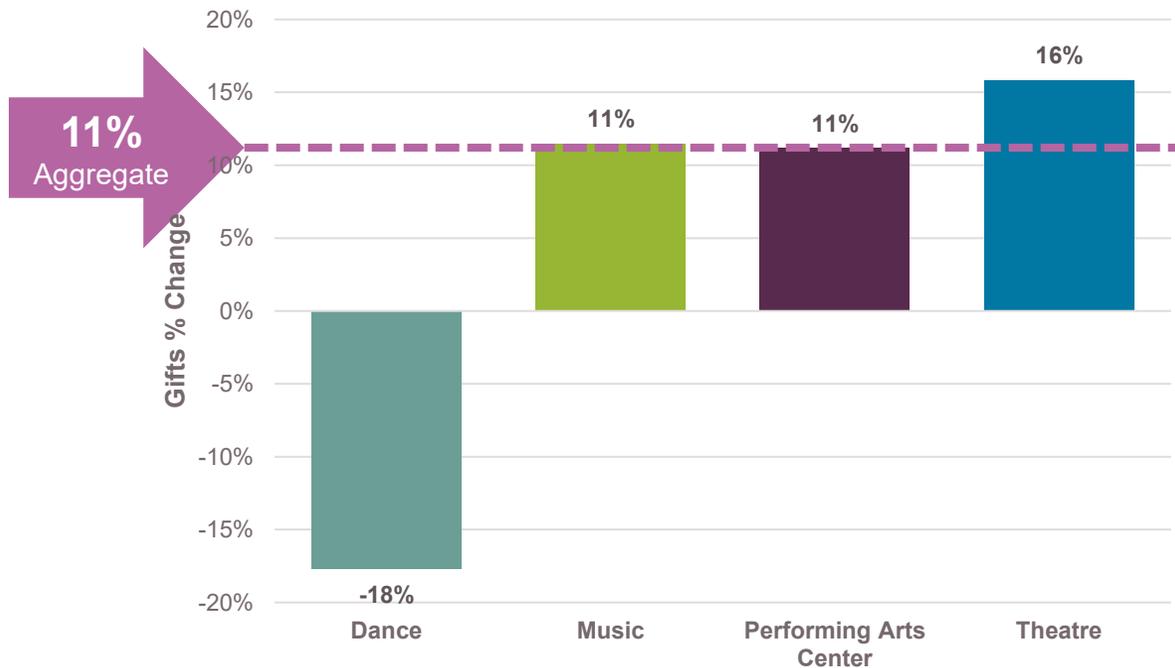
Gifts/Donation Revenue change by genre

2018 vs 2025



Gifts/Donation Revenue change by genre

2023 vs 2025



North American Benchmark Headlines

Relationships are growing, but not enough to offset declines in other metrics

CHEERS!



- Household volume in single tickets, subscriptions, and donations have increased in recent years.
- Most organizations have been able to grow single ticket per capita revenue faster than inflation.
- Subscribers significantly grew their commitment to tickets in 2025.

FEARS...



- Frequency and average tickets per order are contracting faster than orgs are engaging or attracting single ticket buyers.
- Vast majority of single ticket buyers are only coming once per year.
- For most organizations per capita revenue from loyalists subscribing and donating has NOT kept pace with inflation.

