

# The New Subscription Economy

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## Speakers

- » **Kate Hagen**, Senior Consultant, TRG Arts
- » **Christina Littlejohn**, Chief Executive Officer, Arkansas Symphony Orchestra
- » **John O'Dell**, Patron Advancement Officer, The Cleveland Orchestra
- » **Rachel Rossos Gallant**, Vice President, Marketing and Membership, League of American Orchestras

# TRG's Arts and Culture Benchmark Subscription Trends



TRG  
ARTS

League  
of American  
Orchestras



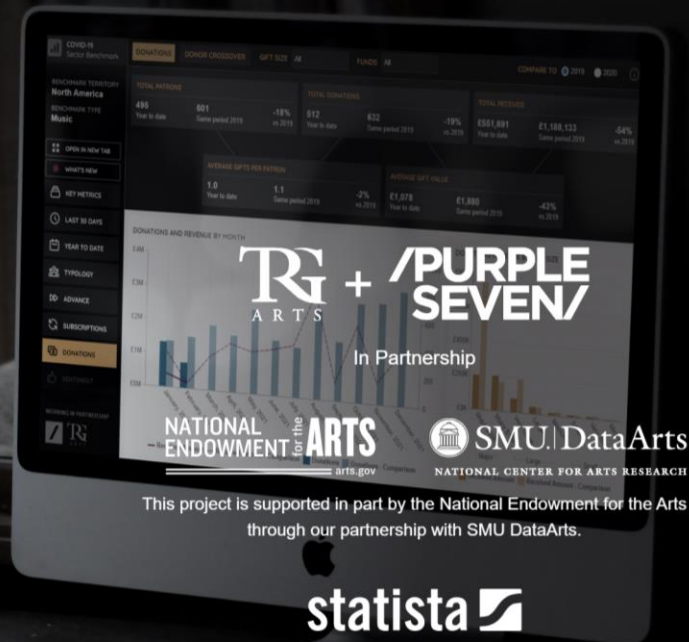
**Kate Hagen**  
Senior Consultant  
TRG Arts

# 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.

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

# 1) 167 US Performing Arts Organizations

- 35 Orchestras
  - Group 1: 16
  - Group 2: 4
  - Group 3: 4
  - Group 4: 8
  - Group 5: 1
  - Group 6: 2
- Expansion project underway to increase representation from mid- and smaller-budget Orchestras.

## 2) Definitions

- Subscription trends include a range of ticket package options like Fixed, Membership, Choose, and Flex.
- Subscription sales in this study are assigned to a specific season based on transaction date.
  - The transaction date ranges used to define a season is February 1 through January 31. For example, a subscription transaction made in January 2025 would be attributed to the 2024-25 Season.
  - This study refers to the 2019-20 Season. Subscription transactions attributed to this season, in this study, took place between February 1, 2019 and January 31, 2020, prior to the start of the COVID-19 Pandemic.

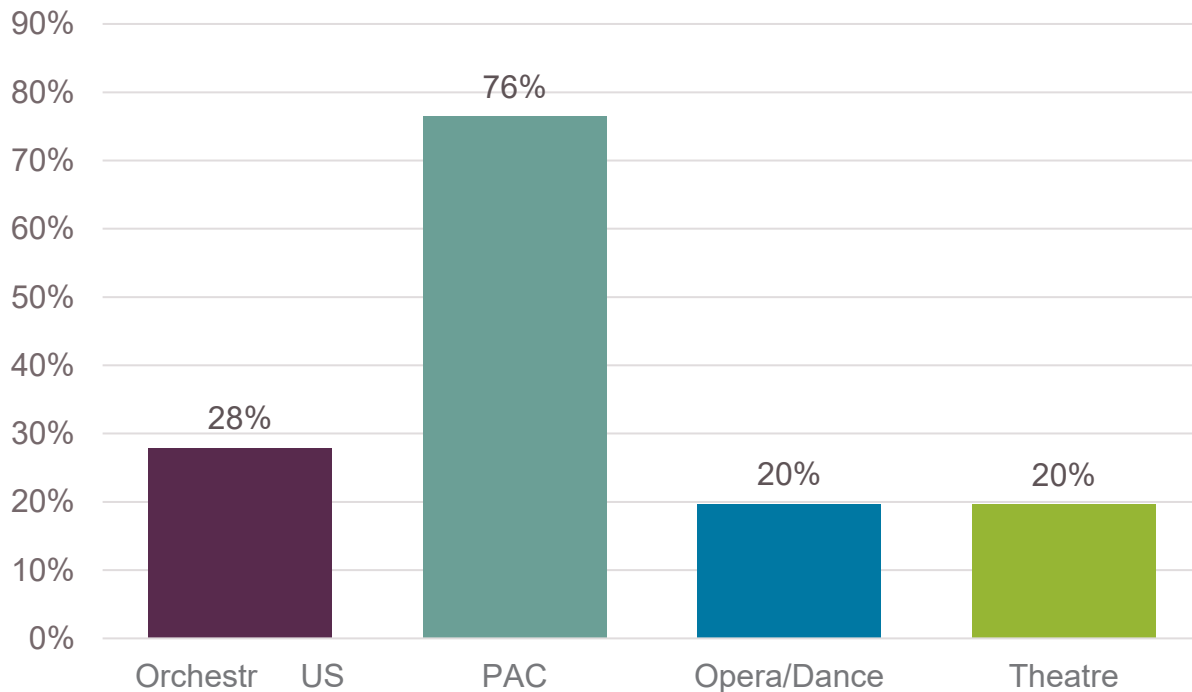
# Study Data Set Details

# Subscription Trends

# Subscription Revenue Change US Performing Arts Orgs

2019-20 Season vs 2024-25 Season

Data based on order date and from a sample of US performing arts organizations participating in TRG's Arts & Culture Benchmark

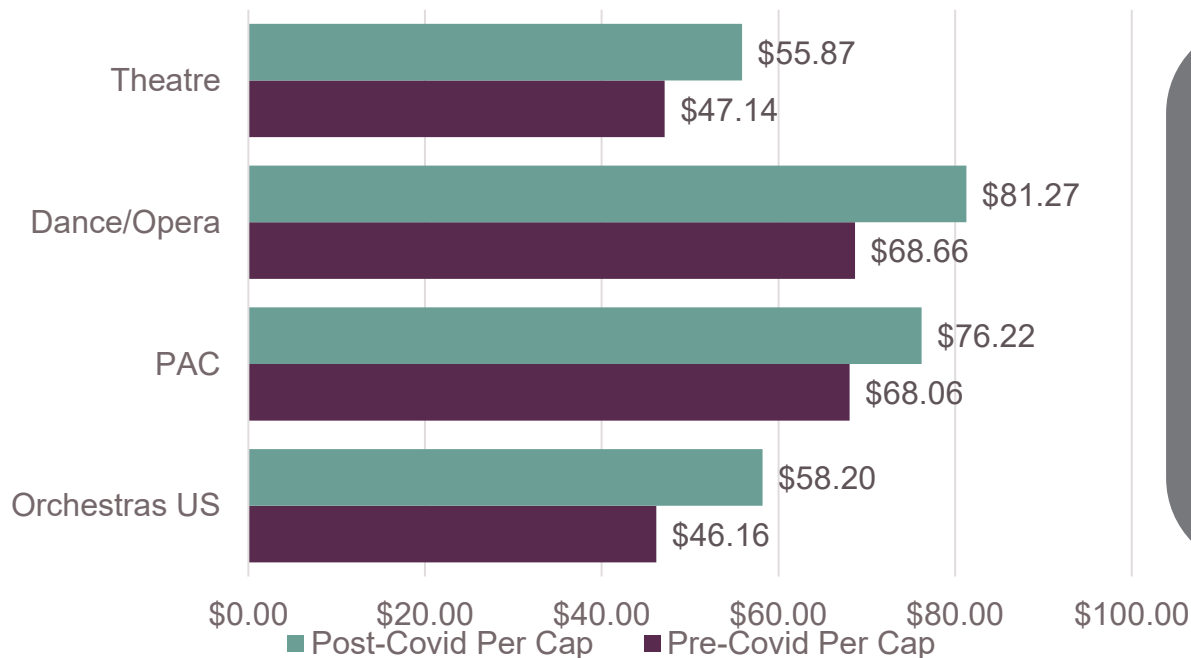


# Subscription

## Per Capita Rev: US Performing Arts Orgs

2019-20 Season vs 2024-25 Season

Data based on order date and from a sample of US performing arts organizations participating in TRG's Arts & Culture Benchmark



### Per Capita Revenue US Orchestras

**Pre: \$ 46.16**

*Worth Today: \$ 56.67 in 2024*

**Post: \$ 58.20**



## Subscription

US Performing Arts Organizations

*2019-20 Season vs 2024-25 Season*

**Units:**  
**2.1 vs 2.2M**  
**Revenue:**  
**\$114M vs \$143M**

Data based on order date and from a sample of US performing arts organizations participating in TRG's Arts & Culture Benchmark

25%

Revenue

3%

Units  
*(Not Packages)*



# Subscription Revenue

US Orchestras

*2019-20 Season vs 2024-25 Season*

**Units:**  
**759K vs 770K**

**Revenue:**  
**\$35M vs \$45M**

Data based on order  
date and from a  
sample of US  
Orchestras  
participating in  
TRG's Arts & Culture  
Benchmark

28%

Revenue

1%

Units  
*(Not Packages)*

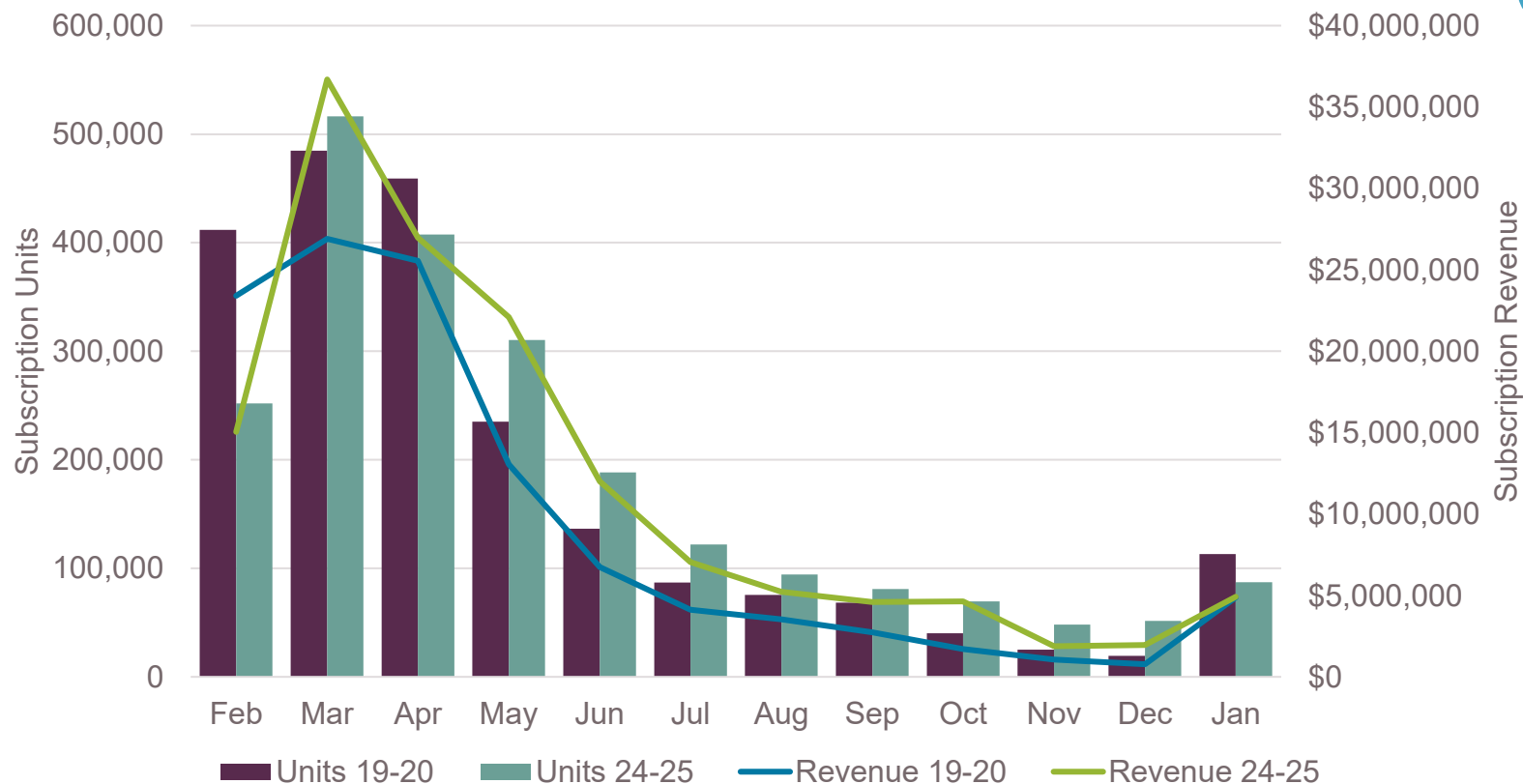


# Subscription

## US Performing Arts Organizations

2019-20 Season vs 2024-25 Season

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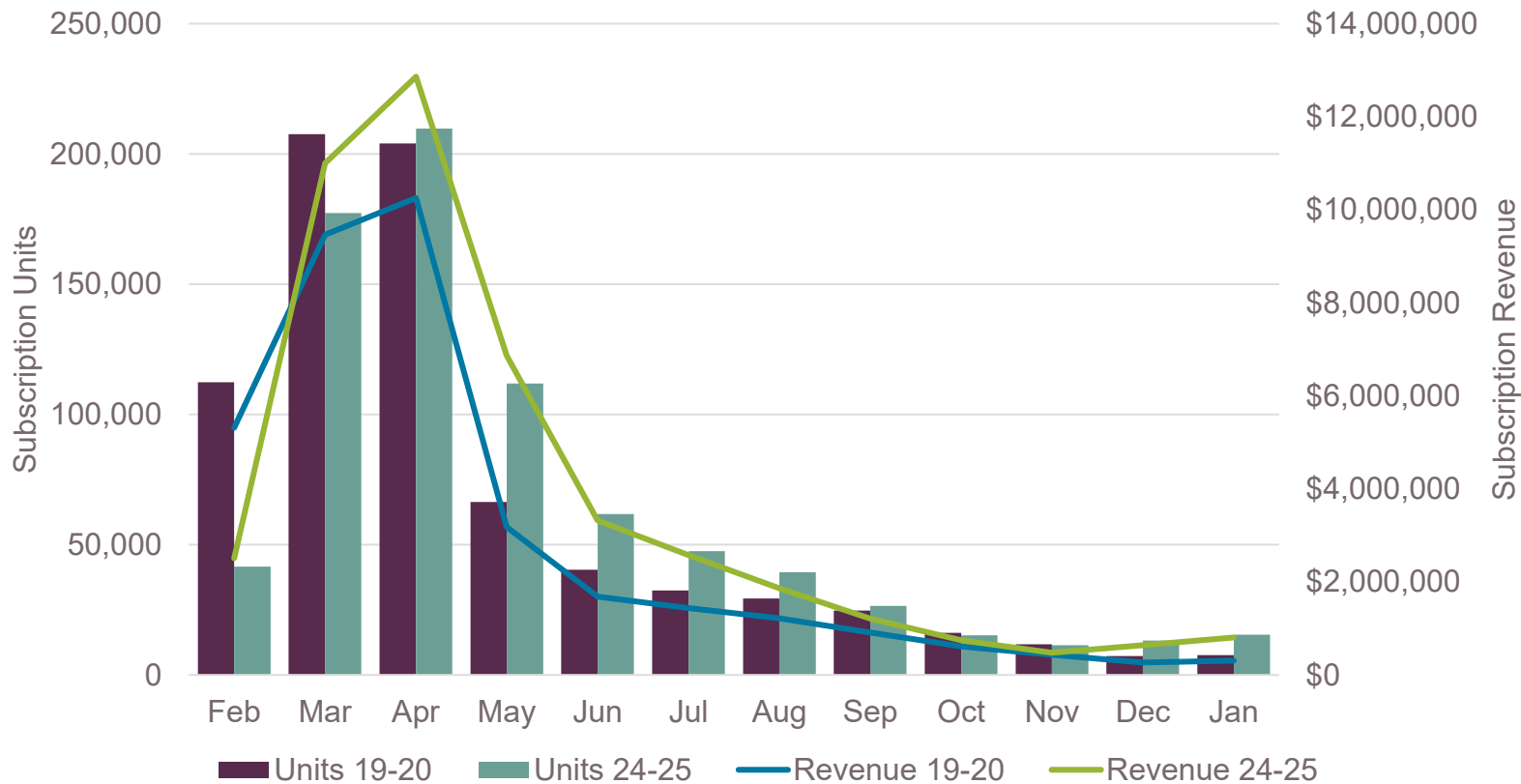


# Subscription

## US Orchestras

2019-20 Season vs 2024-25 Season

Data based on order date and from a sample of US Orchestras participating in TRG's Arts & Culture Benchmark

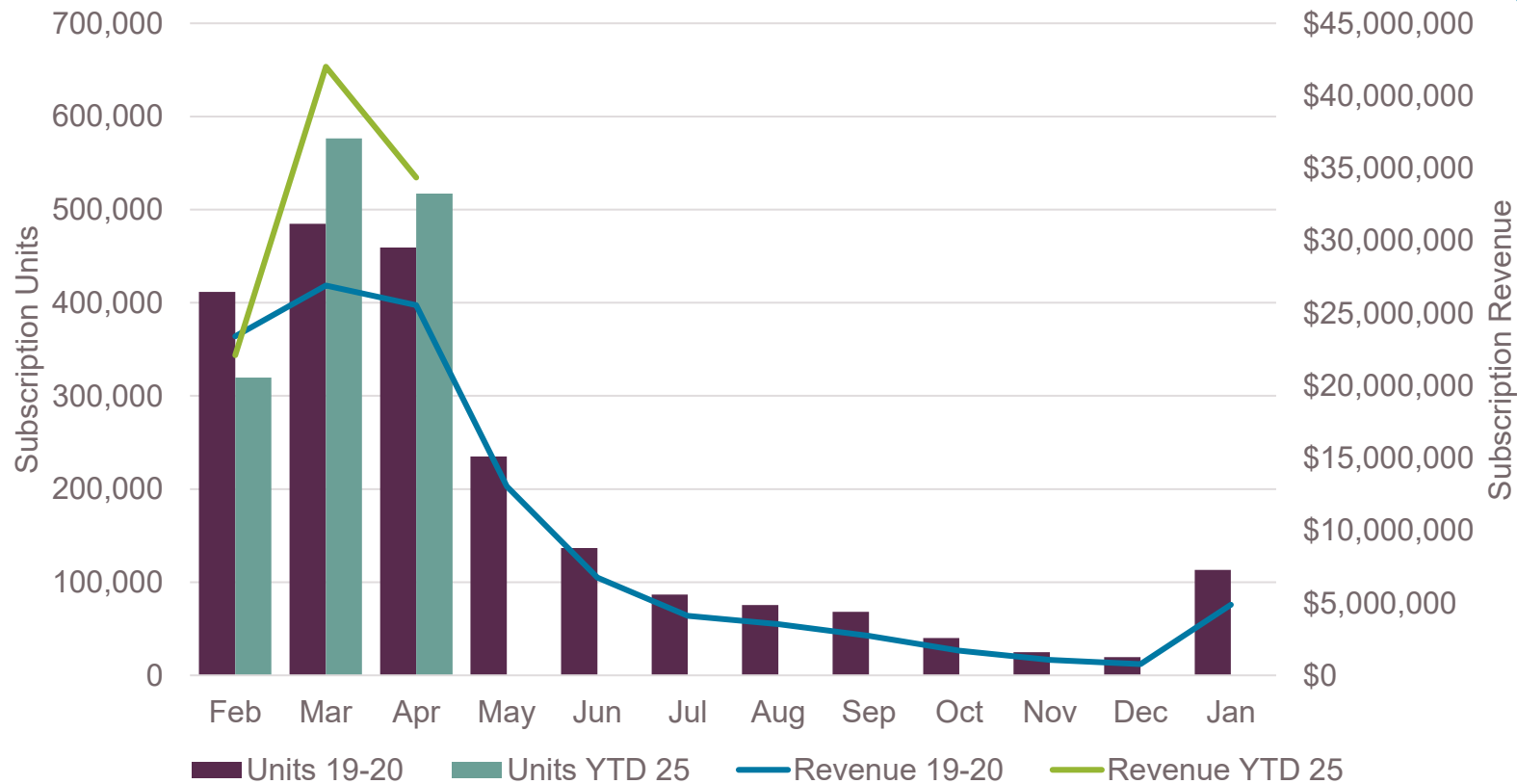


# Subscription

## US Performing Arts Organizations

2019-20 Season vs 2025-26 Season YTD

Data based on order date and from a sample of US performing arts organizations participating in TRG's Arts & Culture Benchmark

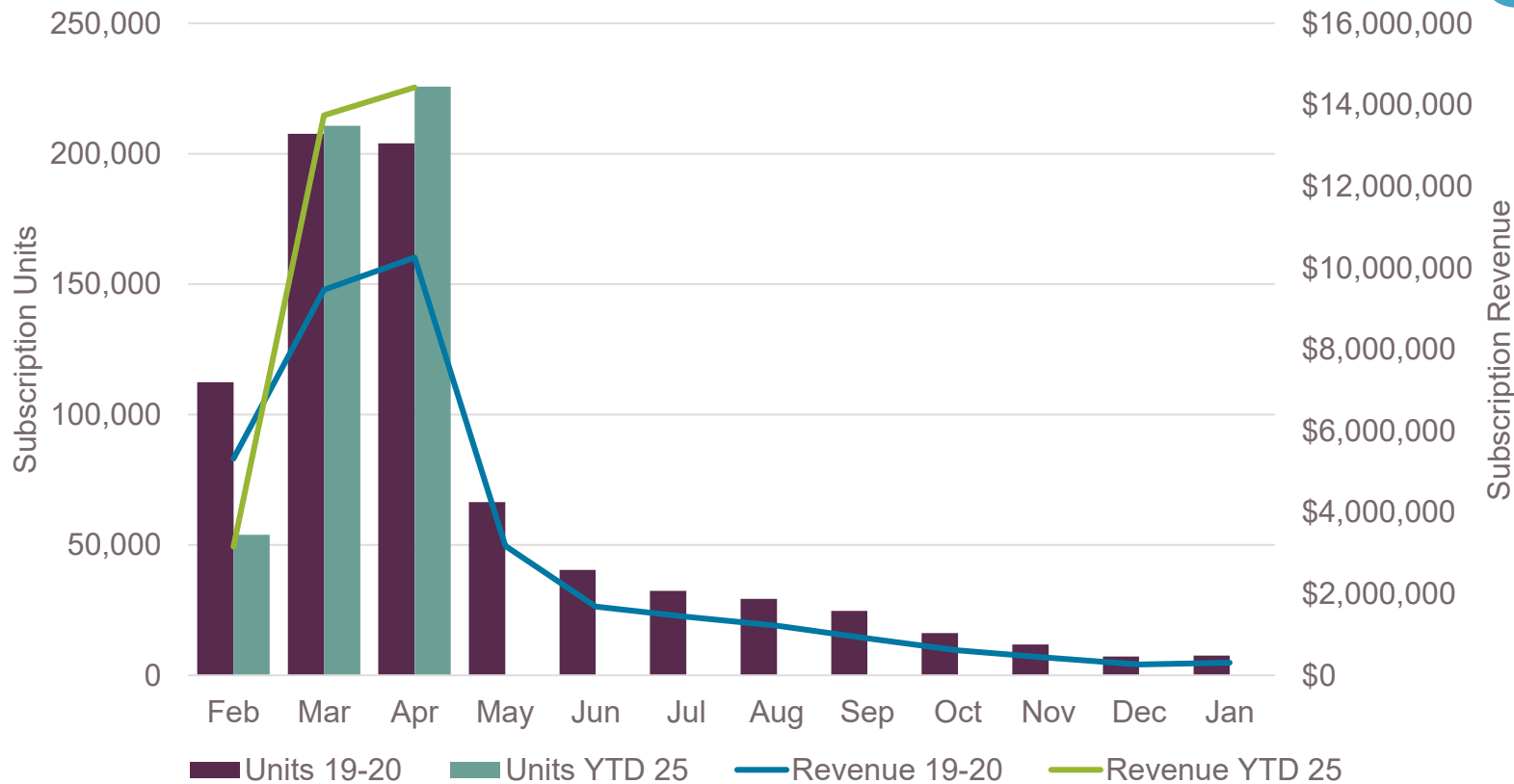


# Subscription

## US Orchestras

2019-20 Season vs 2025-26 Season YTD

Data based on order date and from a sample of US Orchestras participating in TRG's Arts & Culture Benchmark







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SYMPHONY  
ORCHESTRA

**Artistic Innovation      Community Service**  
**Sustainability**





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**Your Symphony On Your Schedule!**

# Concert Membership Growth

**FY23**

**FY24**

**FY25**

**636**

**915**

**1,051**



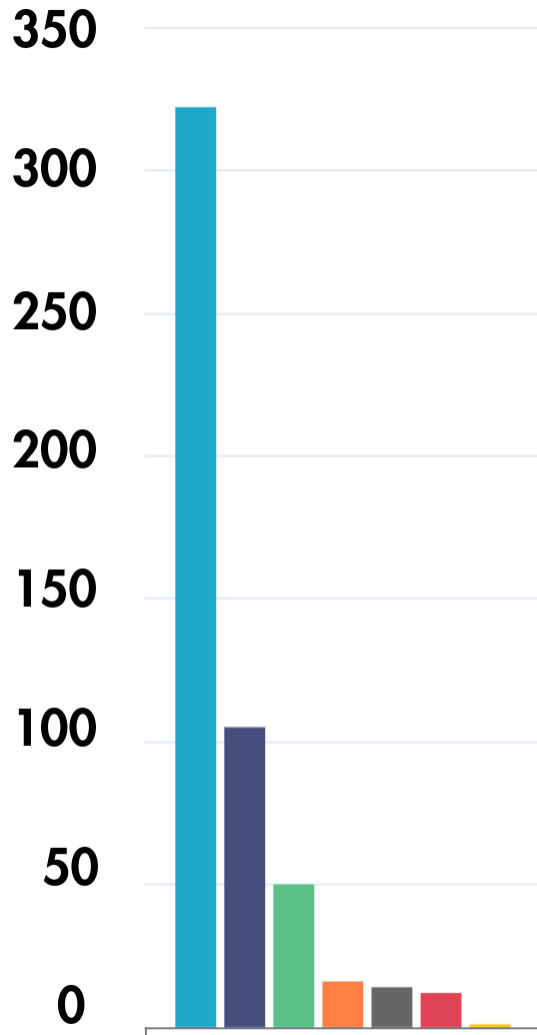


**Who Are They?**

# 24-25 Season

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HOUSEHOLDS



 Existing Members: 322

 New to File: 105

 Multi-Buyers: 50

 Subscribers: 16

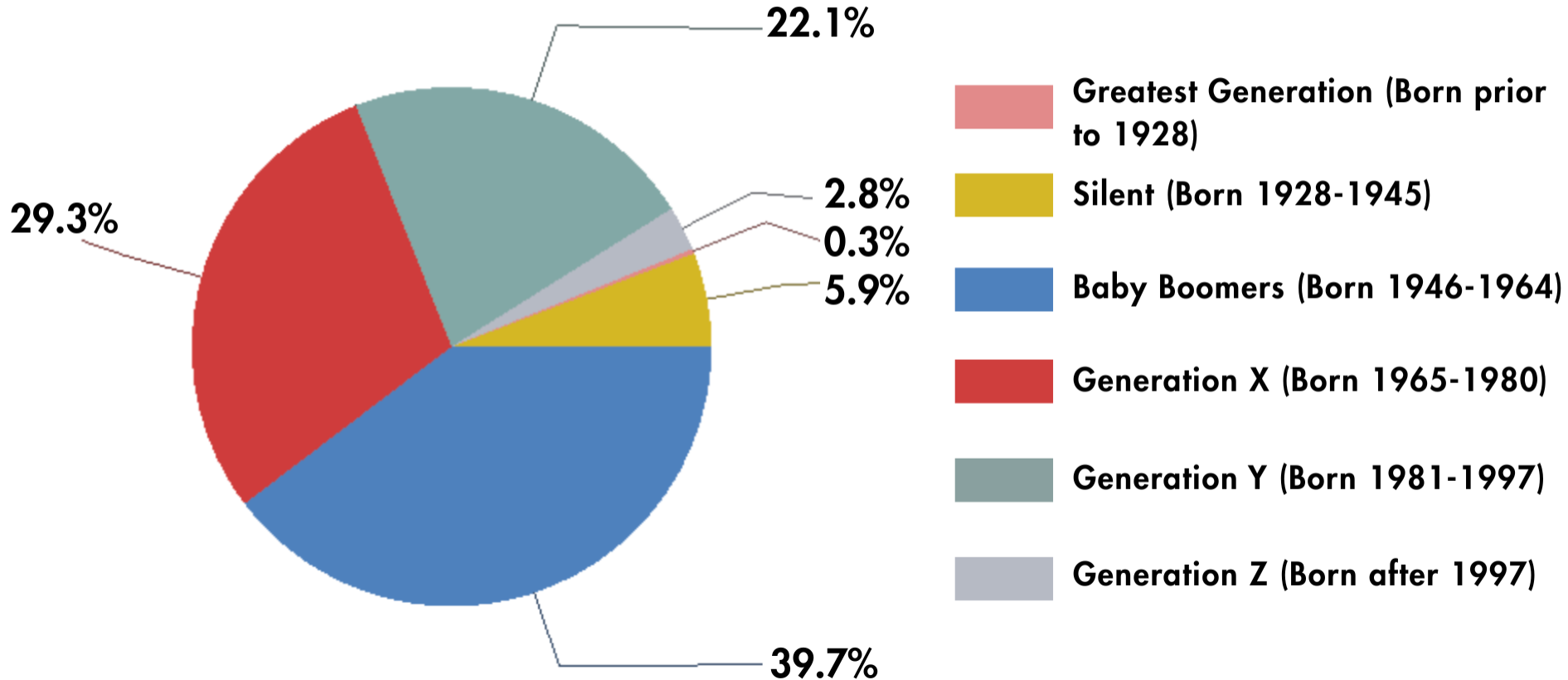
 Lapsed Multi-Buyers: 14

 Lapsed Members: 12

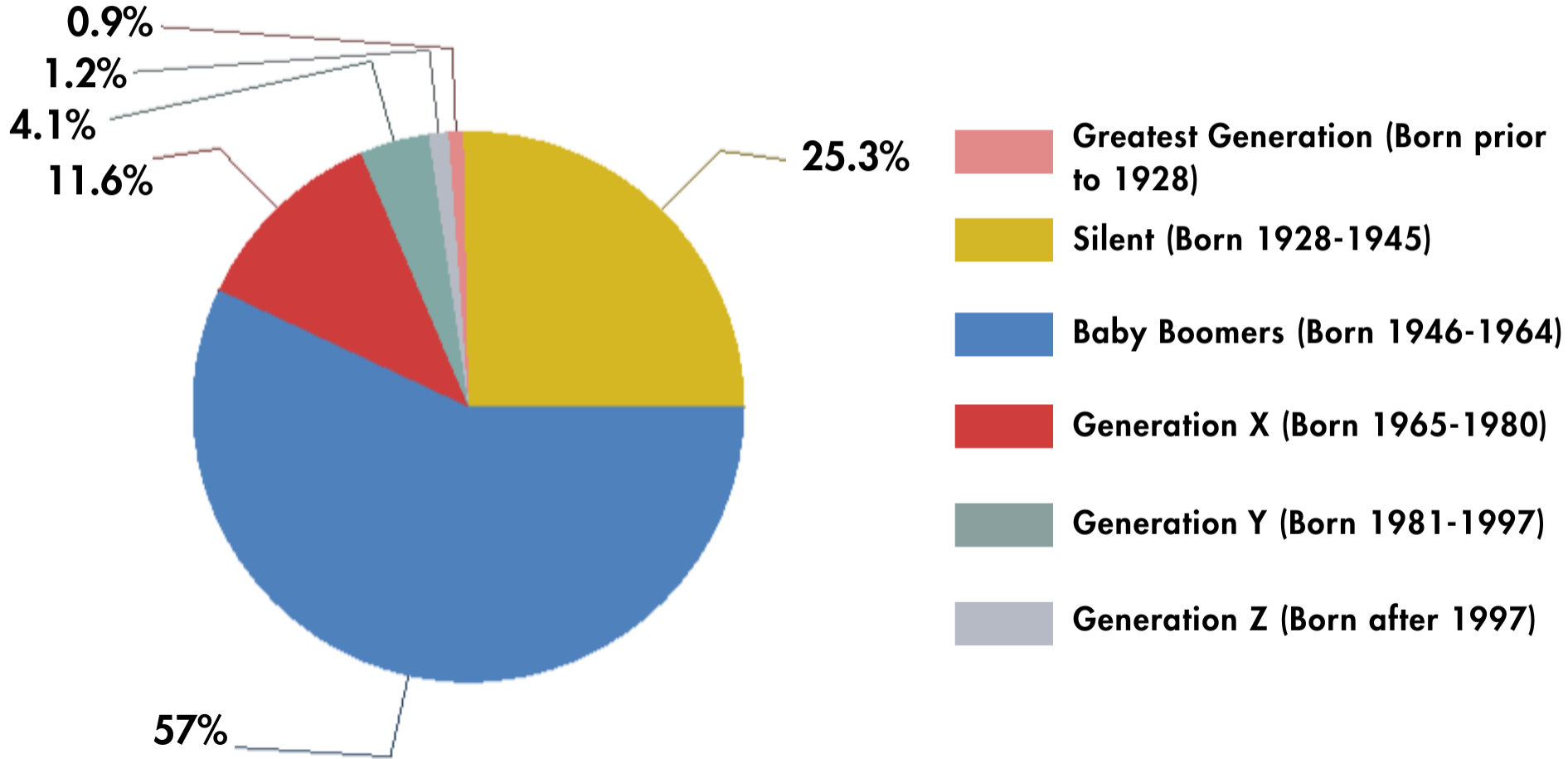
 Lapsed Subscriber: 1

**Total: 520 Member Households**

# Generation Demographics: **Membership**

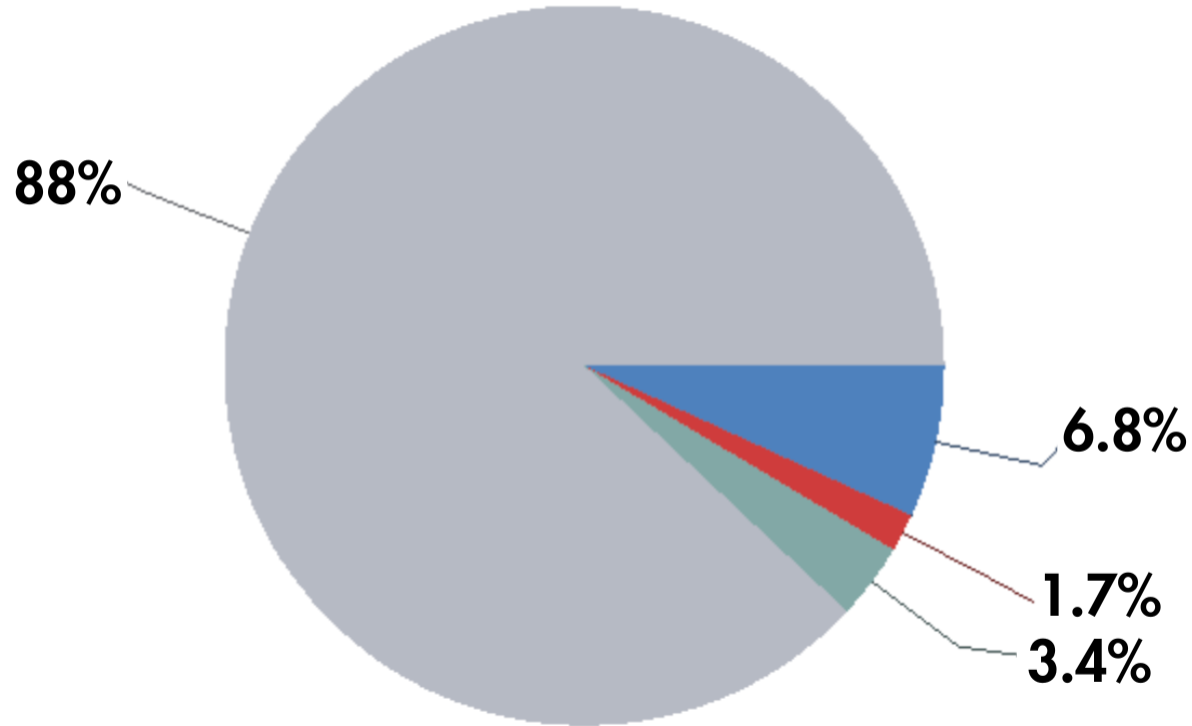


# Generation Demographics: **Subscription**



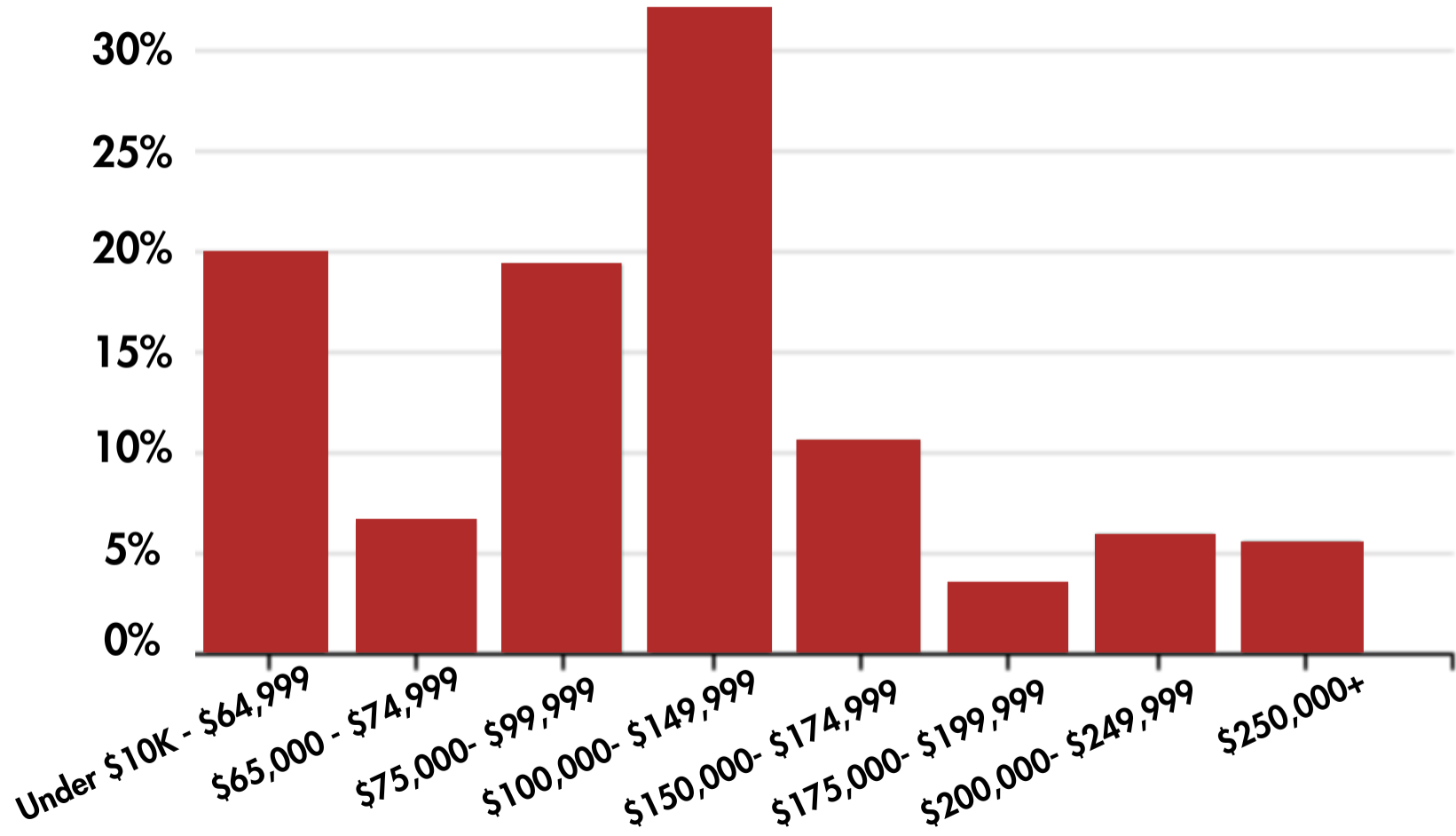


# Race Demographics



 **Hispanic**     **White**     **African American**     **Asian**

# Income Demographics



# Artistic Innovation

C. P. E. Bach

Samuel Coleridge-Taylor

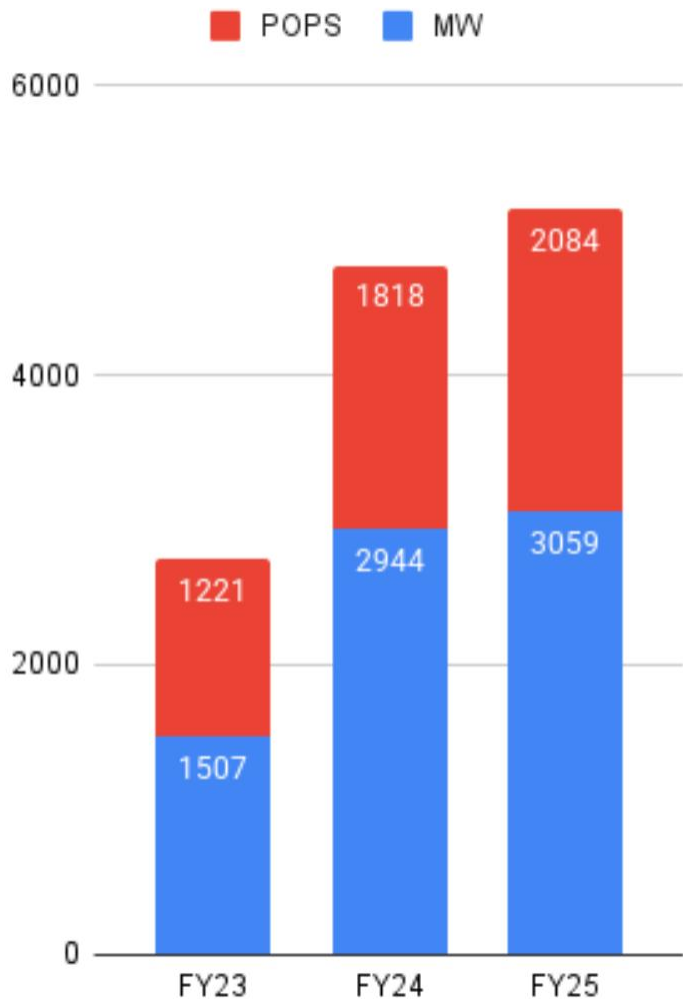
Circus at the Symphony

William Dawson

Henry Purcell

Jean Françaix

Felix Mendelssohn



# Membership Reservations

FY23	FY24	FY25
1507	2944	3059
1221	1818	2084

Which concert had the highest member reservation this season?

**Beethoven & Blue Jeans! Closely followed by Fairies & Flowers**





# Sustainability

# Membership Revenue

**FY23**

**FY24**

**FY25**

**\$49,059**

**\$89,748**

**\$115,311**



# Membership Retention

A diverse group of people, including a woman with a pink bow in her hair and an older man, are seated in an audience and clapping. The image is slightly blurred, suggesting a candid moment during an event.

**Annual rate 73.6% (97.5% monthly)**

# Membership Frequency

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**33.33% - Not Active**

**66.67% - Active**

**28.66% - Light (Attending 1-2 Concerts)**

**14.84% - Medium (Attending 3-4 Concerts)**

**56.50% - Heavy (Attending 5+ Concerts)**



# NEXT STEPS

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**Annual Fund Donations  
Grow Concert Membership Plus  
Retention**

An aerial photograph of a modern, multi-story building with large glass windows, situated in an urban environment. The building is surrounded by greenery and a parking lot. In the background, a city skyline is visible under a twilight sky with a warm orange and blue gradient. The text is overlaid on the image, with the top line 'NEXT STEPS' in a large, white, sans-serif font, followed by a thin red horizontal line. Below the line, the text 'Annual Fund Donations', 'Grow Concert Membership Plus', and 'Retention' are stacked vertically in a bold, white, sans-serif font.

CRITIC'S NOTEBOOK

# What if Orchestras Were More Like Netflix?

As subscriptions face an uncertain future, classical music could look to the membership models of streaming services and gyms for inspiration.



Memberships at the Arkansas Symphony Orchestra have grown rapidly, while about a third of subscribers were lost during the pandemic. Kelly Hicks

# The ASO Is In the New York Times!



# Scan The QR Code To Read

# Discussion and Q&A

**Thank you!**