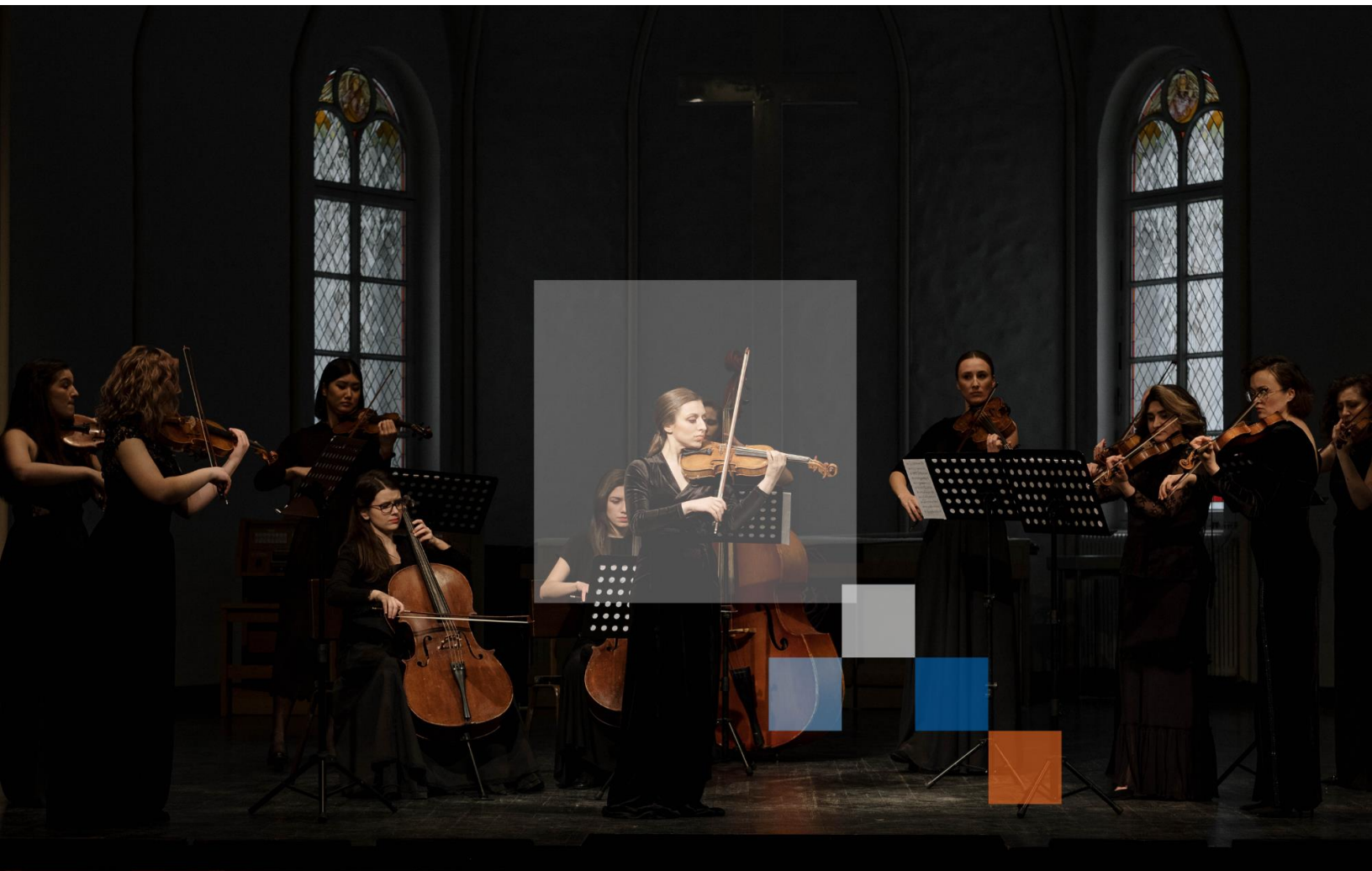


TRENDS IN AUDIENCE BEHAVIOR

# Subscription Sales

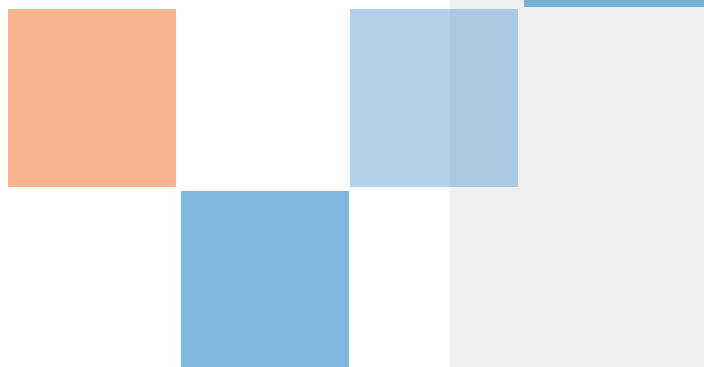


An analysis of the change in subscription sales since 2019.

Created by JCA Arts Marketing  
January 2023

# MEASURING SUBSCRIPTION SALES—DON'T PANIC.

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Thank you for your interest in our study on subscription trends after the pandemic!

As you are likely aware, many organizations have seen a steep decrease in subscription sales after reopening from the pandemic shutdown. As consultants, we often get questions from our clients like “how do we reactivate our subscriber base?”, “how do we find new subscribers?”, and even “is it time to abandon our subscription model?”.

We embarked on this study to gain a more thorough understanding of subscriber decline, and—more importantly—to find what clues and insights the data gives us regarding how to address the issue.

While the data in this study may not be immediately encouraging, we want to emphasize that **we should view subscription decline as an opportunity**. There are many advantages to the subscription model, but there are also many disadvantages. Let’s take the data as inspiration to move forward and innovate in this new world.

In other words—don’t panic. We’re all in this together and we’ll get through it together!

All best,

**The Team at JCA Arts Marketing**

[jcainc.com/arts-marketing](http://jcainc.com/arts-marketing)



# THE DATA

Trends in Audience Behavior – Subscription Sales



# Data & Definitions

Under  
Analysis

Data for this study was gathered from 28 major organizations\* in different regions of the U.S.:

- 12 Music Organizations
- 11 Theatre Companies
- 5 Opera Companies

All organizations in the analysis have fall to spring seasons.

Our analysis compares subscription sales for 2022-23 (FY 2023) to past seasons in 2021-22 (FY 2022) and 2018-19 (FY 2019).

Data was collected between 11/30-12/20/2022.

## Our Study Reviews Four Primary Types of Subscription Models:

**Fixed Subscription:** A traditional subscription package, where the subscriber purchases a fixed set of performances, with seats assigned at the time of purchase. These could be full-season or partial-season subscriptions.

**Choose Your Own (CYO):** A subscriber selects their own set of performances with a combination of dates and seats, but all are chosen at the time of purchase.

**Ticket Credits:** A subscriber purchases a set of credits that can be redeemed for tickets to a performance. They can be redeemed at the time of purchase or at a later date.

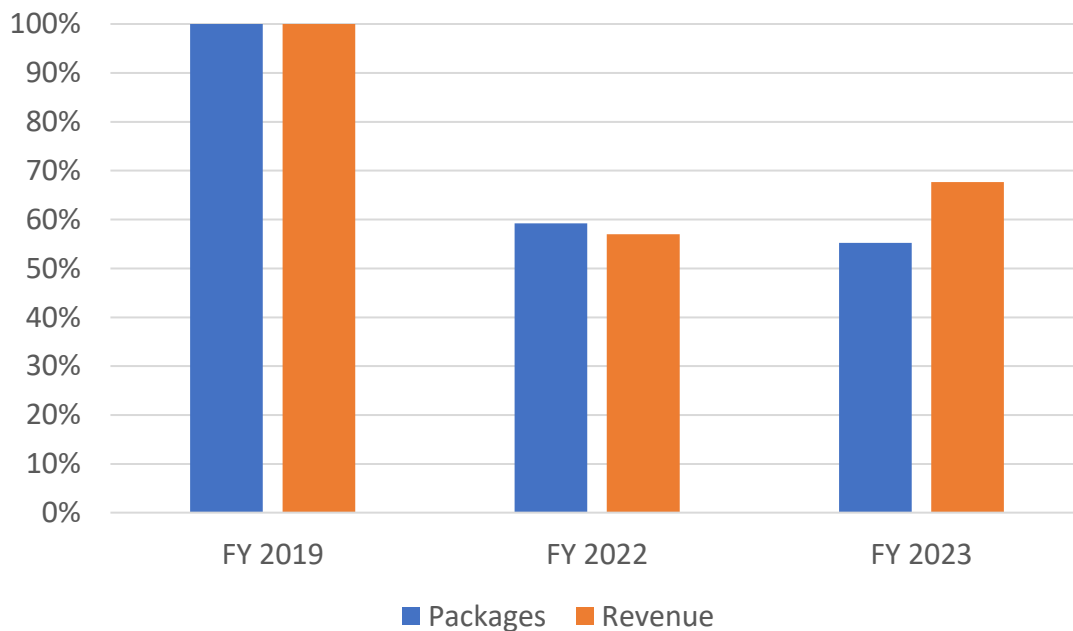
**Pass/Membership:** A subscriber/member pays a fixed amount either monthly or yearly, and can attend performances as often as they'd like.

\*Organization names anonymized for privacy.



## Trends in Audience Behavior – Subscription Sales

# Overall Subscription Sales

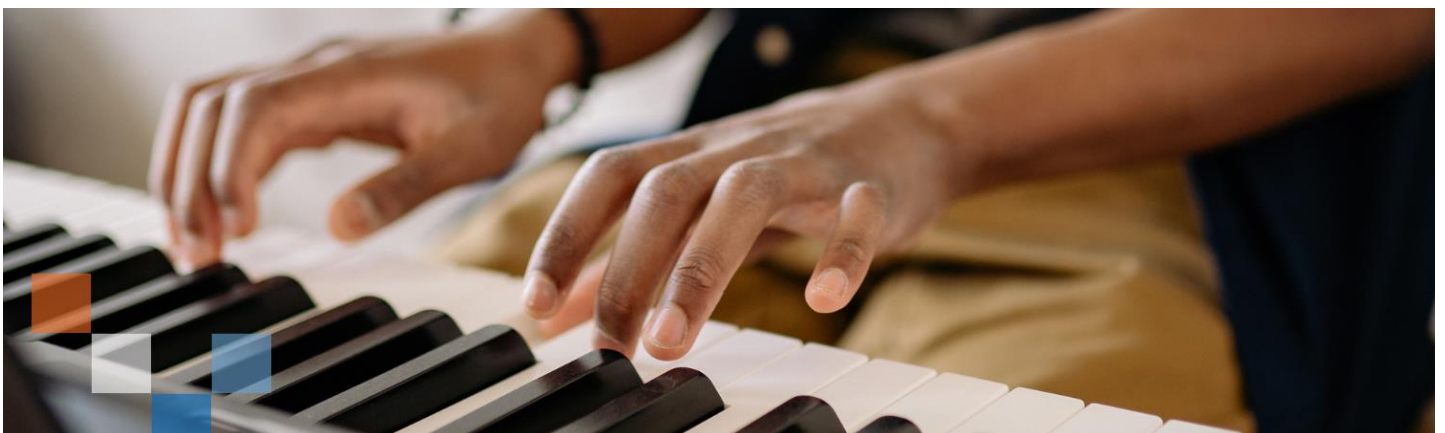
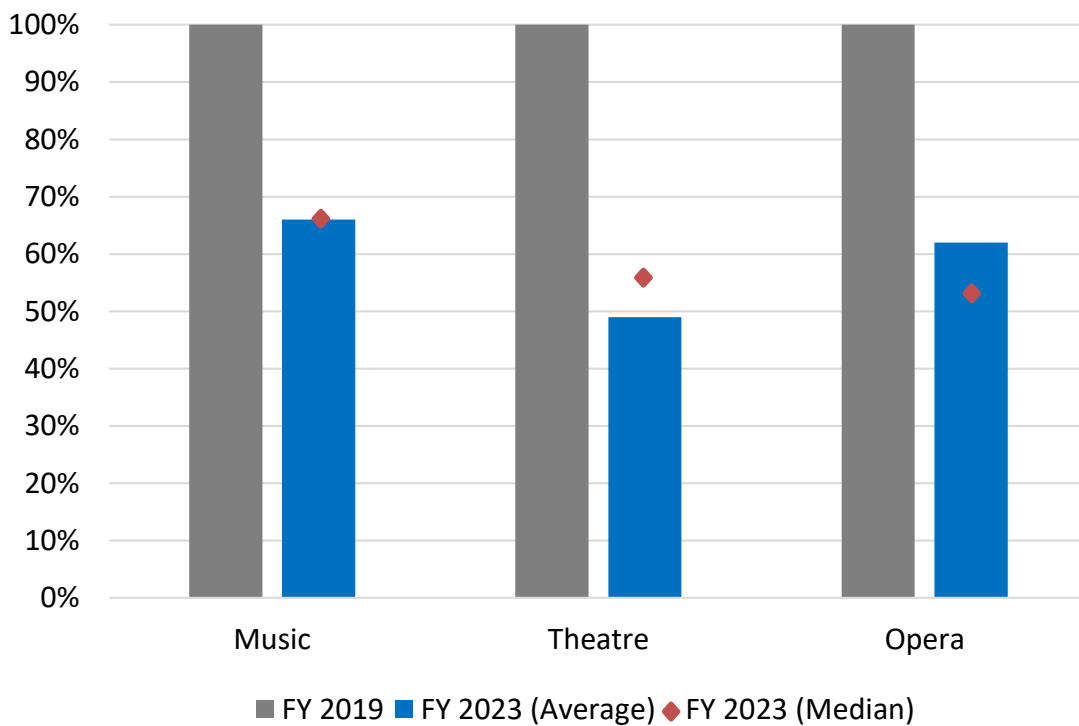


**SUBSCRIPTION SALES ARE DOWN.** In FY 2022, across all organizations studied, the number of subscription packages of all types fell by 41% compared to 2019, and subscription revenue dropped by 45%.

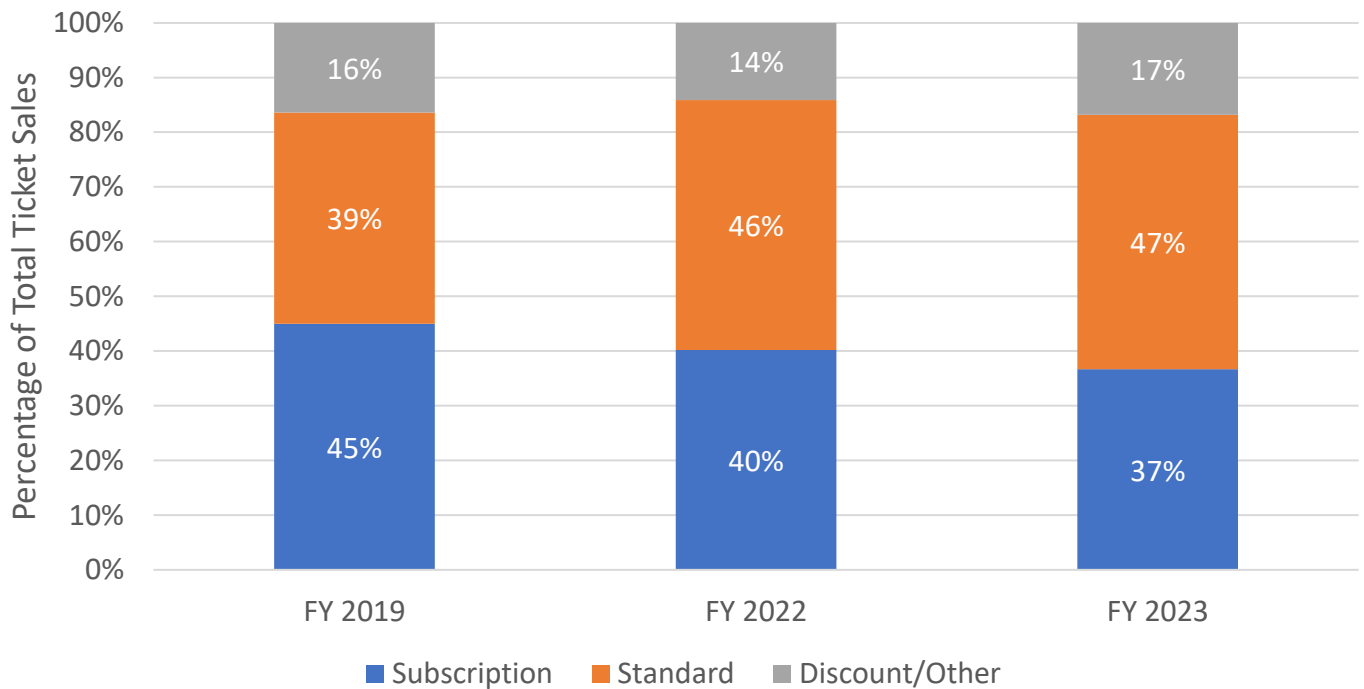
In FY 2023, subscription revenue rebounded to more than 67% of pre-pandemic levels while packages sold still lagged, selling at only 57% of pre-pandemic levels.

# Package Sales by Discipline

By discipline, music has fared the best, with only an average 34% loss in package sales. Theatre was hit the hardest with a 51% drop in package sales. This held true across production houses and Broadway presenters. Opera had the highest deviation, with one cluster of companies losing around 50% of subscribers, and another cluster losing only 20%.



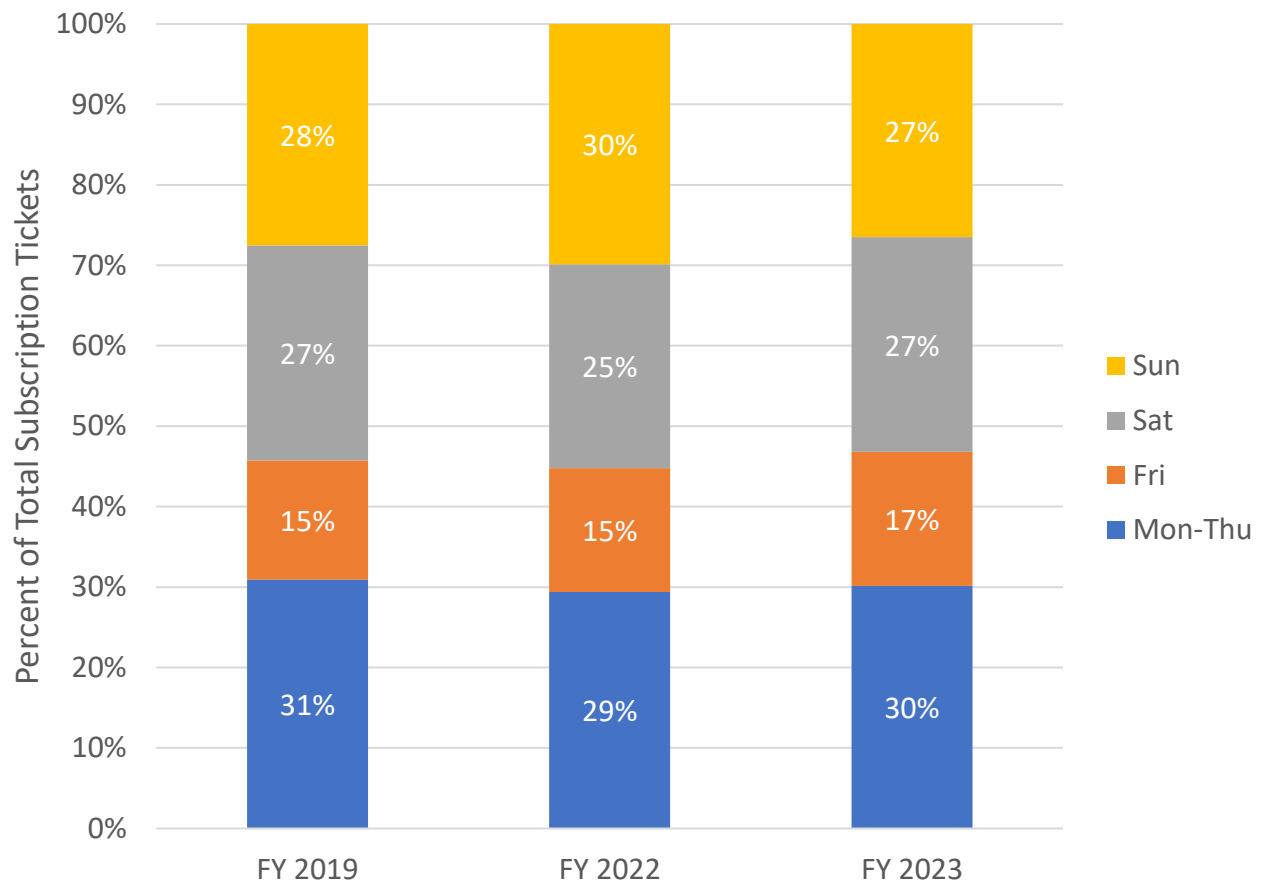
# Audience Composition by Ticket Type



Subscription tickets have dropped from 45% of all tickets sold in FY 2019 to 37% of tickets sold for complete performances in FY 2023.



# Subscribers by Day of Week



There has not been a shift in subscription sales by day of week/time of day. Saturday and Sunday remain the most popular days for subscribers to attend performances. While not shown here, the same is true of single ticket sales. Individual organizations may see shifts towards or away from certain days of the week, but there are no across-the-board trends.

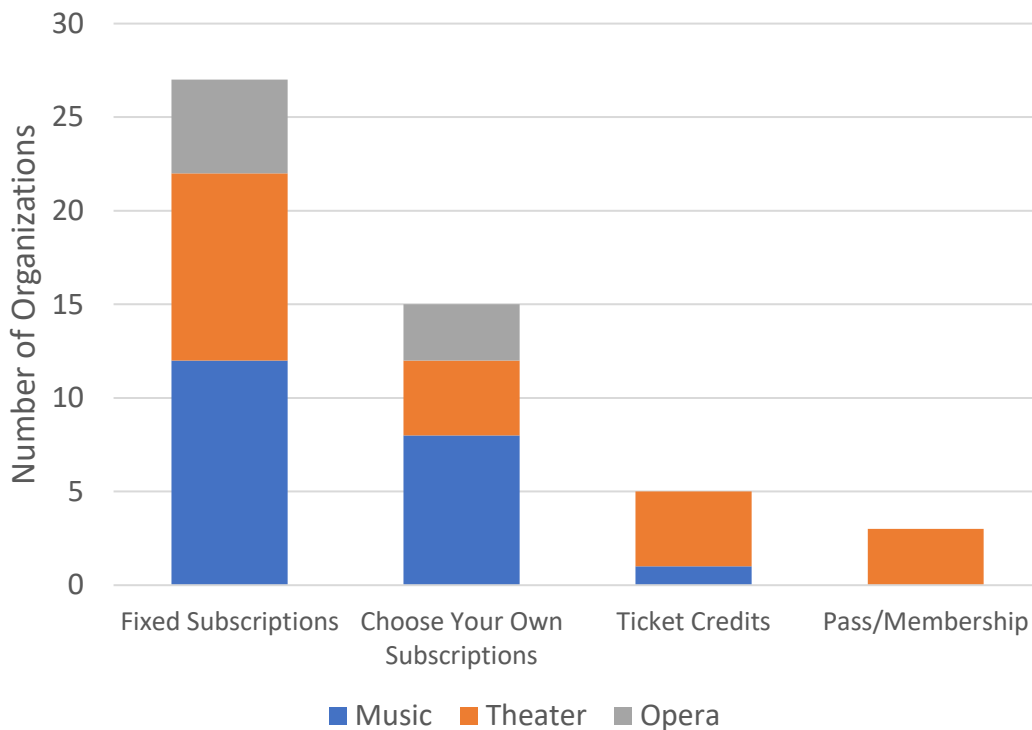


# Subscription Model Adoption

All but one organization in this study currently offers Fixed Subscription options. More than half of the organizations offer a Choose Your Own style Subscription, with music organizations being the most likely to offer this option.

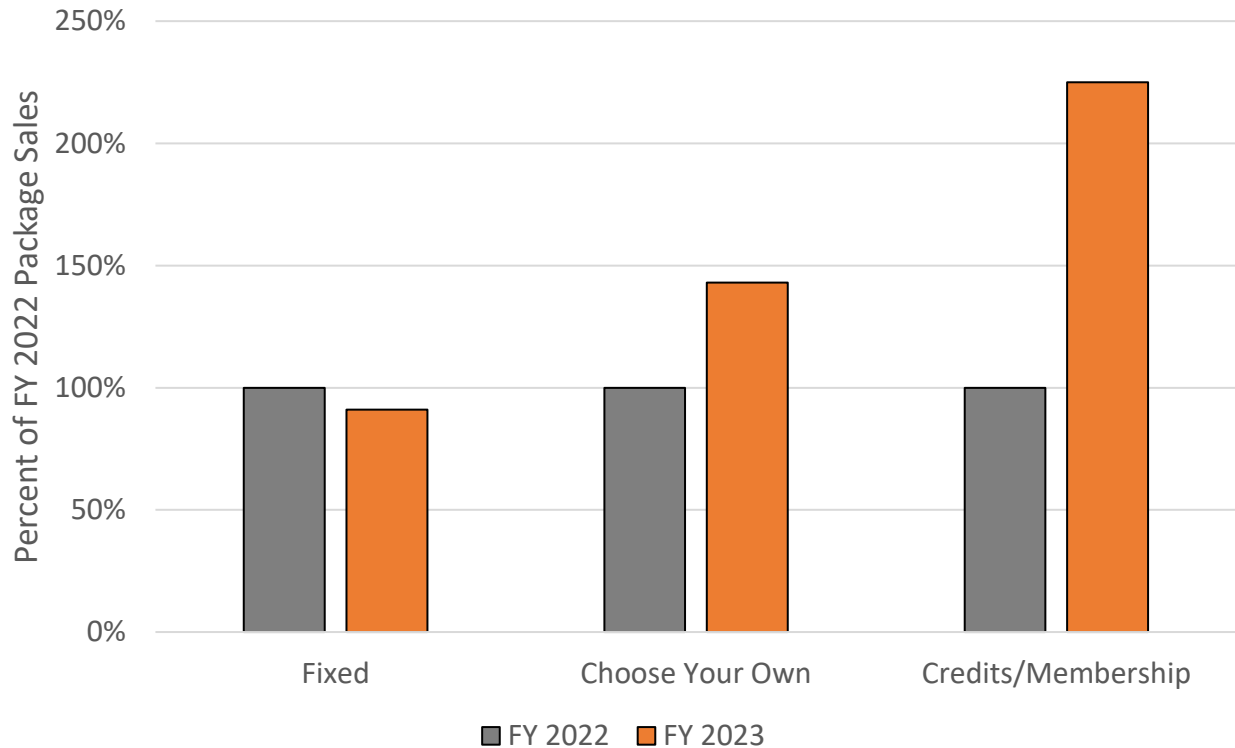
Only five organizations offered a Ticket Credit package over this time period, and three offered a Pass or Membership program (all theatres). Theatre organizations are leading the way in these less-traditional programs.

Number of Organizations That Offer Each Subscription Model



# Subscribers by Package Type

Since reopening after the shut-down, sales for Fixed Subscriptions have continued to decrease, while sales for Choose Your Own Subscriptions, Ticket Credit Packages, and Membership/Pass programs have increased:



## Subscriber Attendance

Subscriber attendance dropped significantly from 2019 to 2022 (the most recent complete season):

In FY 2019

**80%**

of Fixed Subscription  
tickets were used.

In FY 2022

**68%**

of Fixed Subscription  
tickets were used.

Choose Your Own Subscriptions also saw a drop in attendance, but a lesser extent. Choose Your Own subscribers were more likely than Fixed subscribers to attend performances to which they have tickets both pre-and post-pandemic:

In FY 2019

**88%**

of CYO Subscription  
tickets were used.

In FY 2022

**81%**

of CYO Subscription  
tickets were used.

We saw similar numbers for Ticket Credit and Pass/Membership packages, with an 85% attendance rate in FY 2019 and a 76% attendance rate in FY 2022.

# Key Take-aways from This Data



**Theatre companies have the steepest decline in subscription sales but are also leading the field in innovation.** As we saw on page 6, theatres have witnessed a steeper drop in subscription sales since FY 2019; however, we also saw from our subscription model adoption chart (page 9) that theatres have rolled out new, flexible packages in higher numbers than other organizations. This is encouraging, as it shows us that theatre companies are innovating and testing new loyalty programs in the face of subscriber decline.

To see examples of theatre companies leading the charge in loyalty program innovation, check out Steppenwolf Theatre's [The Black Card](#), Woolly Mammoth Theatre Company's [Golden Ticket](#), and Zach Theatre's [Zach XP](#).



**While subscriber representation is decreasing, the percentage of single ticket sales is increasing.** We saw on page 7 that standard single tickets represent an increasing amount of ticket sales within our audiences. An opportunity here might be to reallocate marketing budget from subscription acquisition to new audience acquisition and retention.



**Preferred days of the week have not changed since the pandemic.** Just like pre-pandemic, Saturday and Sunday remain the most popular days for subscribers to attend performances (page 8). Remember that our study looks for trends across the industry—it's important to look at your own data to see if this (and other) industry trend holds true at your organization.



**Flexible subscription packages perform better than Fixed Subscription packages.** Subscription packages that offer flexibility (Choose Your Own, Ticket Credits, Passes/Memberships) are growing, whereas Fixed package sales are shrinking (page 10). Additionally, flexible subscriptions have a higher attendance or ticket usage rate than fixed subscription. This presents an opportunity to arts organizations to offer loyalty models that allow for more choice.

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# Finding the Opportunity in Subscription Decline

The numbers and trends in this study might look scary at first glance. The decline in subscribers feels like a threat because our operating models have long depended on them. But there are downsides to subscriptions—many of which we’ve outlined in a recent blog post: [“Subscription Decline is an Opportunity, not a Threat”](#).

All things considered, we feel strongly at JCA Art Marketing that we have an extraordinary opportunity right now—to imagine and build a better model, to leverage the full creative strength of our organizations, and to package the experience of our art in a way that appeals to 21st century lifestyles.

We believe finding the right loyalty model to engender audience engagement, community, and loyalty involves three critical elements:

- 1) The creative strength of your organization
- 2) Research, research, research
- 3) Partnership with your peers

On the next page we’ll outline these three elements in more depth.



# Elements of Loyalty Model Innovation



**Leverage the creative strength of your organization.** Decline in subscriptions is not just a problem for the marketing department, it’s a problem for the entire staff, artists, and crew who work on producing great shows. Fewer subscribers leads to less revenue which leads to less budget to spend on producing and presenting great shows—not to mention the effect that everyone feels when audiences are small.

To quote a friend of ours at Tessitura, “innovation is a process, and it has to be organization-wide.” When we’re finding solutions for our ailing subscription programs, having leadership lead the charge and the whole organization participate can only strengthen the solution.

After all, we’re creative organizations. We have artists, designers, engineers, producers, and front of house managers who are all brilliantly creative. Who knows, maybe a lighting director, a stage manager, or dramaturg might have a great idea to make the audience experience a little more special.

So, use all the resources in your house. Because resolving this issue, frankly, is vital.

# Elements of Loyalty Model Innovation



**Research, Research, Research.** We cannot overestimate the importance of research. Changing your membership or subscription program requires a LOT of work. And it can be costly and timely to go down the wrong path. Doing your research to understand what audiences want and what will motivate loyalty will save you time and money.

Of course, there are loads of quantitative and qualitative research projects that will be helpful in determining your optimal subscription offering. You can do surveys, focus groups, database analysis—all of these are extremely useful. The research project we find most valuable when building loyalty programs is [CONJOINT ANALYSIS](#).



**Partner with your peers.** When you're creating the ideal membership model for your organization, it will benefit you to engage your peers. Research can be expensive, and you may benefit from pooling resources with other similar organizations to do the research together. It's also worth brainstorming with peer organizations to see if you're seeing similar trends, and working together to build the membership model of the future.



# The Future of Subscription

Go forth! Innovate! Prosper!

The decline in subscription is not the end of the road. In fact, it could be the start of a brand-new future.

**As you recalibrate your loyalty model, we're here to help.** Our expert consultants provide the research and marketing insights you need thrive in the future.

LET'S TALK

# Thanks to those who contributed to this study!

## Participating Organizations

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Kay Rollinson

Anna Marie Faulkner

Find more resources for arts organizations at [jcainc.com/arts-marketing](http://jcainc.com/arts-marketing)

