



TRENDS IN AUDIENCE BEHAVIOR


# Loyalty Programs



An analysis of the change in subscription & membership sales since 2019.

Created by JCA Arts Marketing  
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# AS SUBSCRIPTIONS STABILIZE, FLEX PACKAGES SHOW PROMISE.



The drop in subscriptions post-pandemic has been uncomfortable, but not surprising. We have all been aware of the decline in subscriptions sales since the 90s, and the pandemic only hastened what was inevitable.

We conducted this study not to bemoan lower subscription sales again, but to measure how much of a future traditional fixed subscriptions have. We also wanted to understand if newer loyalty programs—like choose-your-own subscriptions, memberships, and ticket credits—have the potential to fill the gap left by our most traditional loyalty program.

What we find is 1) some encouragement that traditional, fixed subscriptions have increased a bit in the last couple seasons, and 2) other forms of membership are starting to grow and fill in the edges of subscription loss.

In other words—subscriptions are not dead yet. They still represent the majority of our loyal audiences, and they are stabilizing. But there is room to innovate and grow as we move further into our new landscape and engage new audiences. After all, we have to get ready for Gen Z!

We hope you enjoy this study and welcome your feedback and insight about what's happening with loyalty program trends at your organization. Never hesitate to reach out to us at [smarter@jcainc.com](mailto:smarter@jcainc.com).

In Data,

**The Team at JCA Arts Marketing**

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



# THE DATA

Trends in Audience Behavior – Loyalty Programs



# Data & Definitions

Under  
Analysis

Data for this study was gathered from 22 major organizations\* in different regions of the U.S.:

- 7 Music Organizations
- 8 Theatre Companies
- 4 Opera Companies
- 3 Performing Arts Centers

All organizations in the analysis have fall to spring seasons.

Our analysis compares subscription sales for 2023-24 (FY24) to past seasons in 2022-23 (FY23), 2021-22 (FY22) and 2018-19 (FY19).

Data was collected between 11/21/2023 and 12/16/2023.

## Our Study Defines Four Primary Types of Loyalty Programs:

**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 subscribers 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 – Loyalty Programs

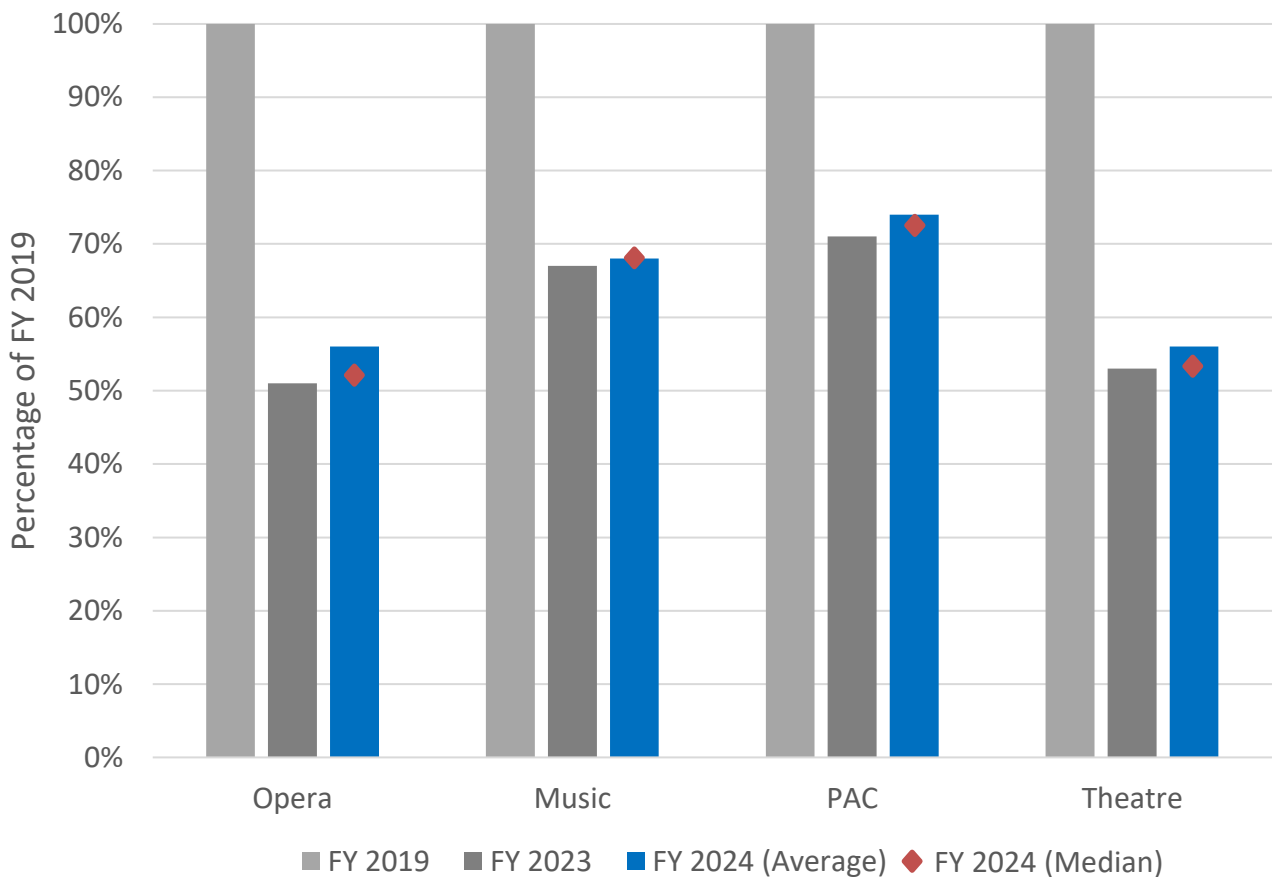
# Overall Subscription Sales



**SUBSCRIPTION SALES INCREASED IN FY24, BUT MAY BE REACHING A PLATEAU.** While subscription sales and income continue to increase since the first season back after the pandemic, the growth pace slowed in FY24. We also see greater growth in income than growth in subscription ticket sales, which is largely due to inflation.

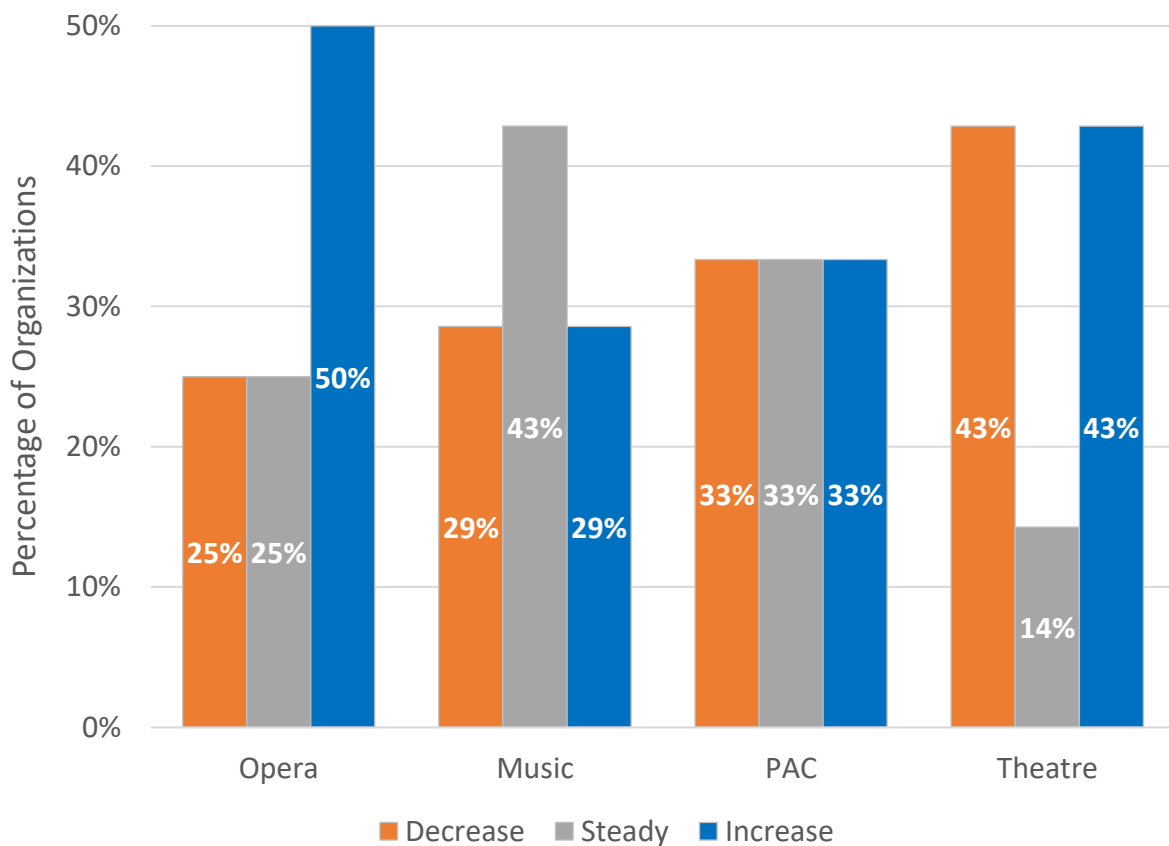
# Subscription Ticket Sales by Genre

**SUBSCRIPTION SALES GREW ACROSS ALL ORGANIZATION TYPES.** All organization types saw growth in subscriptions in FY24 compared to FY23, and Performing Arts Centers had the most subscription sales. Opera saw the biggest growth in subscription sales.

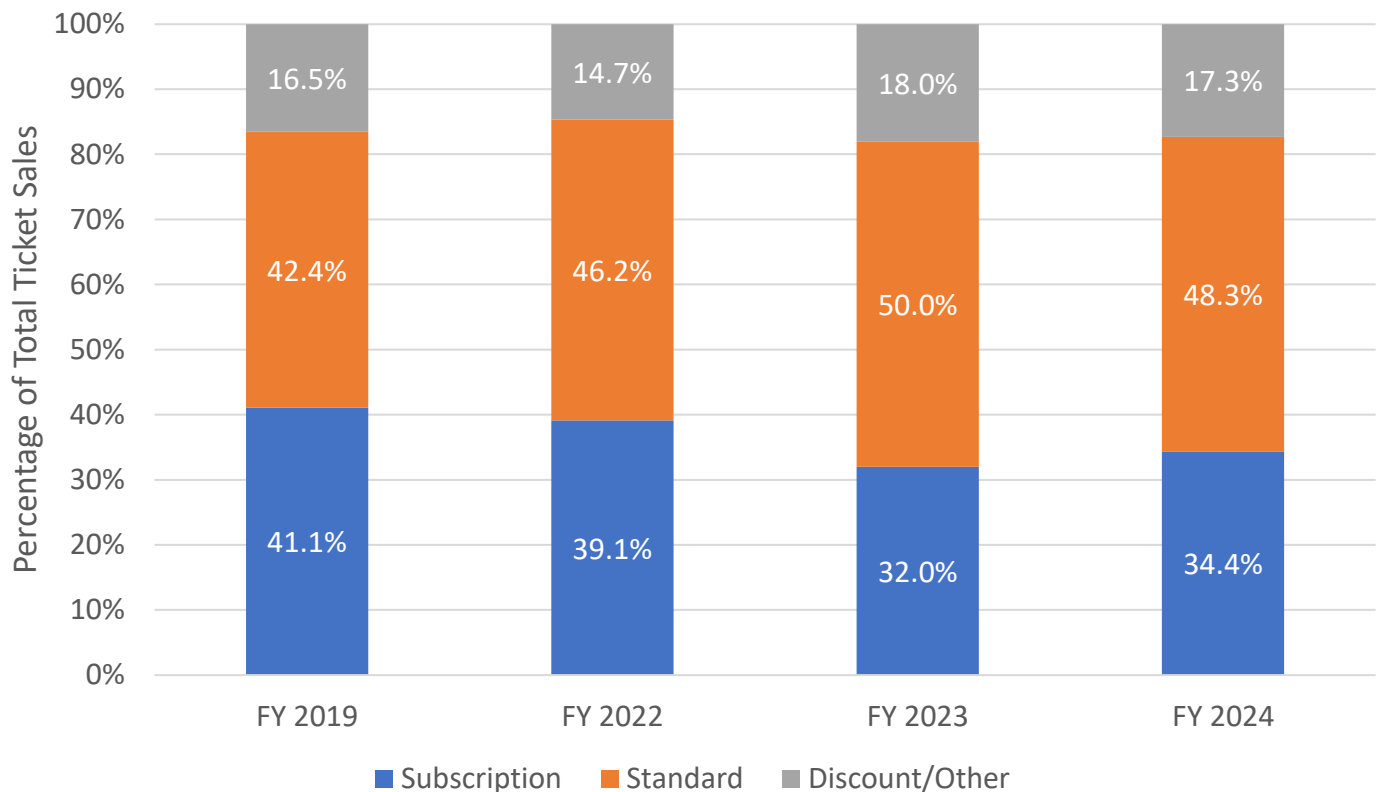


# Change in the Number of Subscription Tickets Sold by Organization Type

**THEATRE HAS THE MOST VOLATILE SUBSCRIPTION SALES, WHEREAS MUSIC HAS THE LEAST VOLATILE.** In the chart below, we see the percentage of organizations that saw an increase, decrease, or no significant change in their subscription sales. Notable is that 50% of the opera companies saw a growth in subscribers, whereas theatre saw an even percentage (45%) of companies that had a growth in subscribers compared to a loss. Music organizations are the most stable with subscription sales.



# Audience Composition by Ticket Type

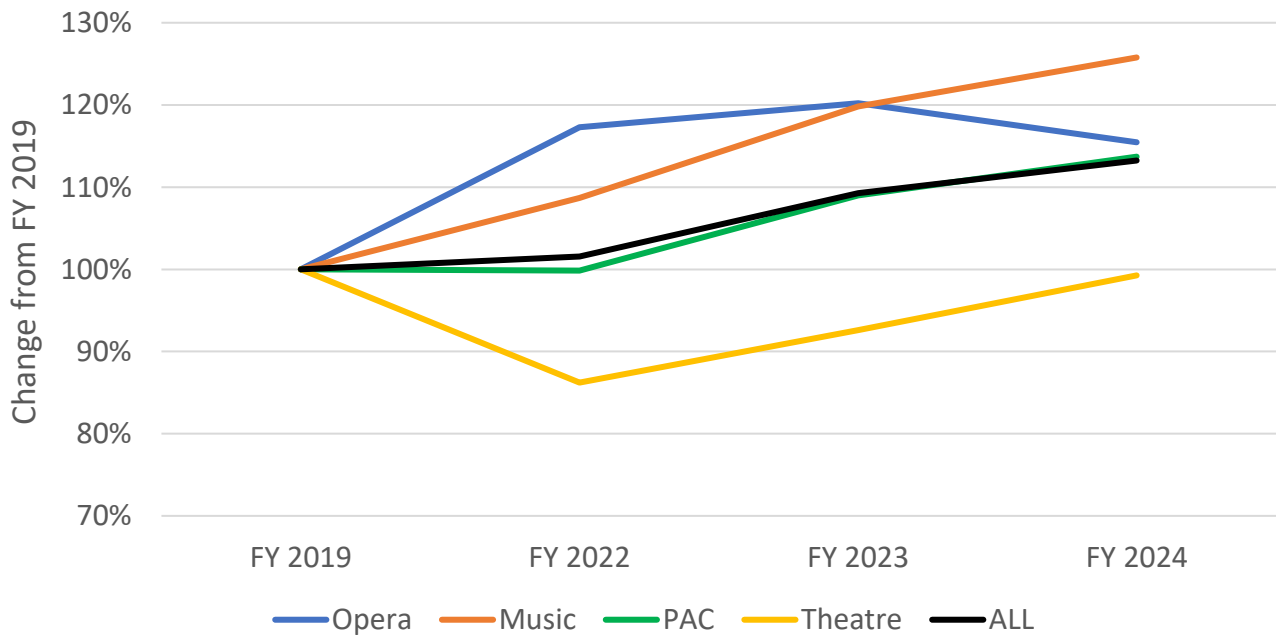


**SUBSCRIBERS STILL MAKE UP A SMALLER PERCENTAGE OF THE AUDIENCE THAN PRE-PANDEMIC.** While the percentage of subscribers in the audience grew in FY24, subscription representation in the audience is down while standard ticket representation is up compared to pre-pandemic. Note that representation of subscribers in FY22 was higher than FY23 and FY24 due to fewer performances during the first season back from the shut-down.



## Trends in Audience Behavior – Loyalty Programs

# Average Yield from Subscription Tickets



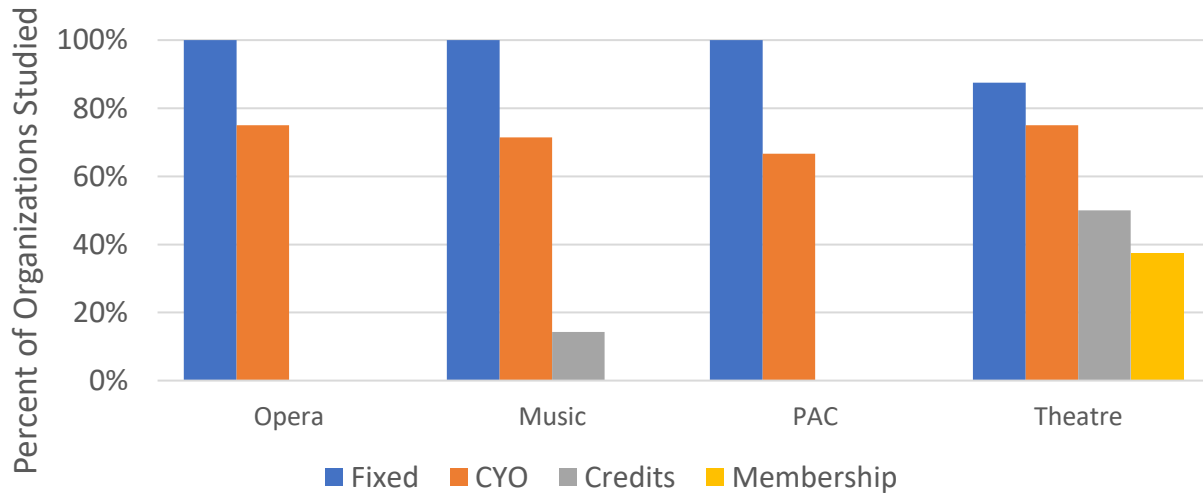
**AVERAGE YIELD FOR THEATRES IS STILL LOWER THAN PRE-PANDEMIC.** This is likely because, as we'll see on page 10, theatres are the more likely than other organization types to test non-traditional subscriptions and memberships.

Music organizations have seen the largest increase in average yield, while average yield for performing arts centers decreased since FY23.

# Loyalty Program Adoption

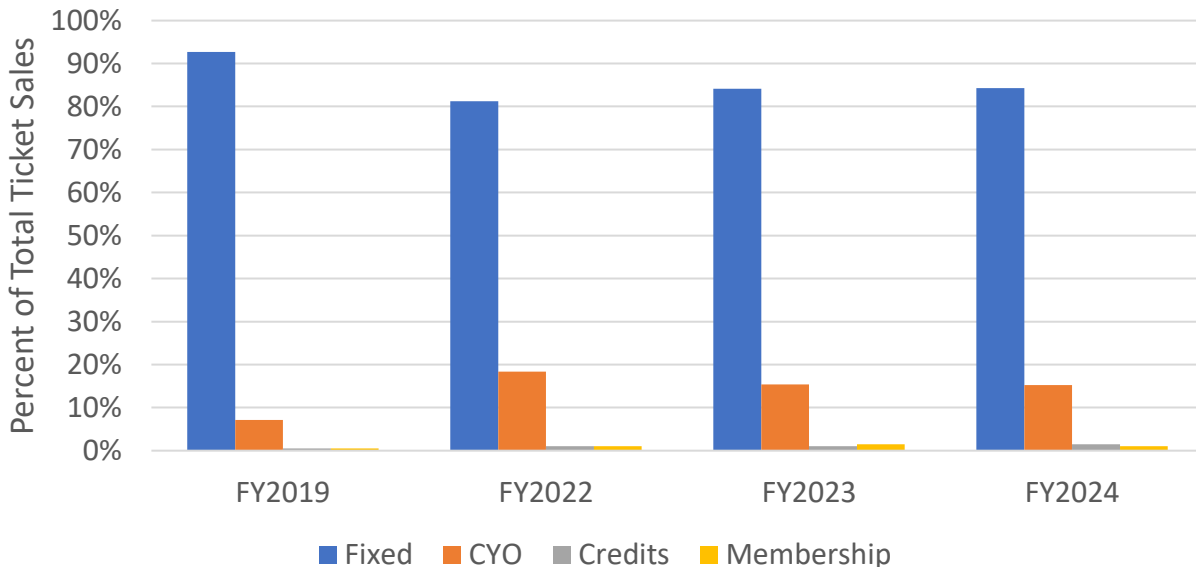
**IN OUR STUDY, ONLY THEATRE ORGANIZATIONS HAVE ADOPTED ALL FOUR LOYALTY MODEL TYPES.** Several music organizations adopted a credit program, while opera and PACs only had fixed and CYO subscriptions.

Percent of Organizations That Offer Each Loyalty Model

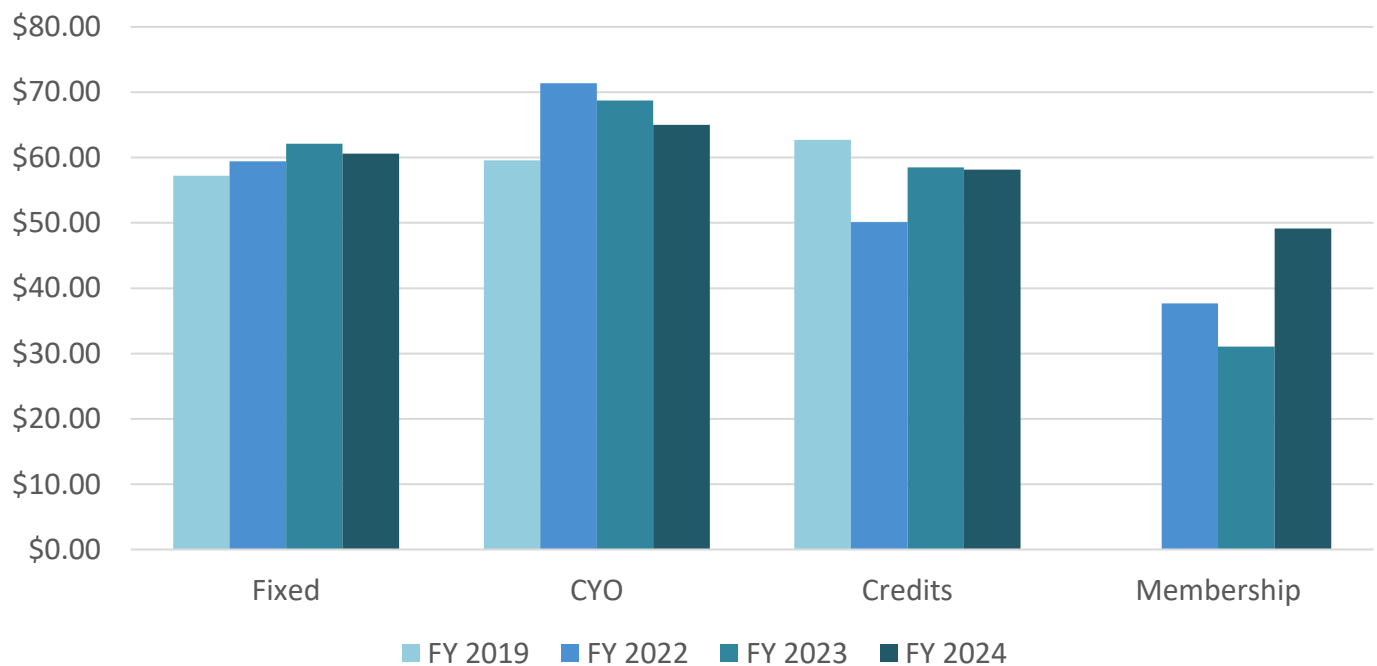


**CREDITS AND MEMBERSHIPS ALSO ONLY MAKE UP A TINY PROPORTION OF ALL SUBSCRIPTION TICKETS SOLD.** CYO packages make up about 15% of all subscription tickets sold.

Percent of Total Subscription Ticket Sales by Package Type



# Average Yield by Loyalty Program Type



**MEMBERSHIPS HAVE THE LOWEST AVERAGE YIELD PER TICKET, BUT IT'S GROWING.** This is partially because members often pay something up front for access to discounted tickets, and that up front amount is not included in this study.

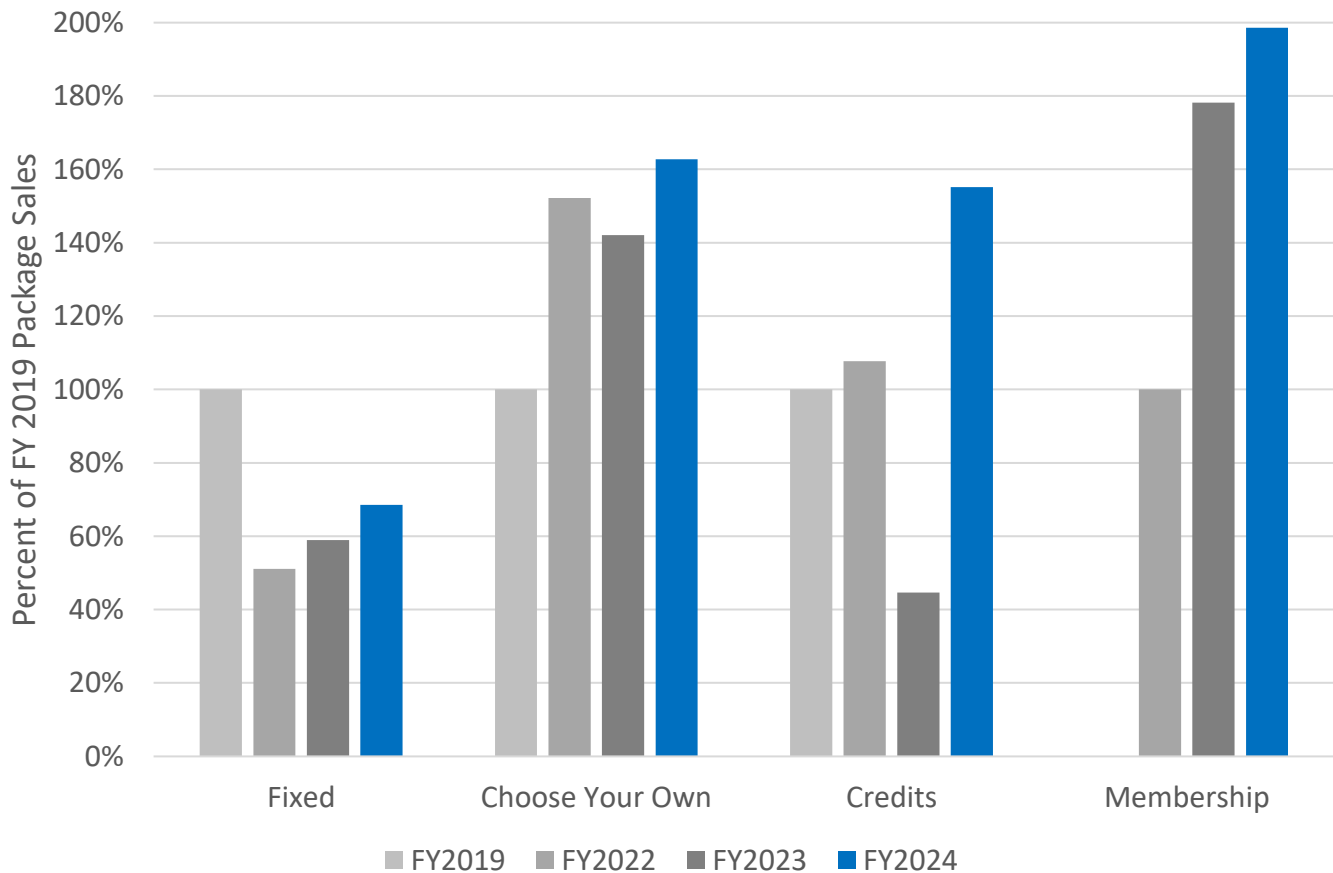
CYO tickets have the highest average yield—a change since pre-pandemic.



## Trends in Audience Behavior – Loyalty Programs



# Change in Sales by Loyalty Program Type



**AMONGST THE FOUR TYPES OF LOYALTY PROGRAMS STUDIED, MEMERSHIPS ARE GROWING THE FASTEST.** While memberships represent a small percentage of the audience (as discussed on page 10), they are growing at a much faster rate than other loyalty program types.

# Key Learnings

## What these findings mean for you.



**Fixed subscriptions are stabilizing, but they aren't going back to pre-pandemic numbers.** Our research indicates a stabilization in subscription numbers (page 5). Given that we are now in the third season following the pandemic, it's unlikely that we will see pre-pandemic subscription numbers again in the aggregate—at least anytime soon. Therefore, rather than continuing subscription reactivation campaigns of lapsed pre-pandemic subscribers, our focus should be on efforts to acquire new fixed subscribers, develop new loyalty programs (such as memberships), and convert lapsed pre-pandemic subscribers to single ticket buyers.



**A mixture of loyalty program types is your best bet.** Different types of loyalty programs attract different people with varying lifestyles and behaviors, so it's ideal to offer a mixture of programs—similar to how you offer tickets to the same production at multiple price-points to accommodate people with different values. While traditional subscription packages represent the majority of subscription sales at this time (page 10), offering other loyalty programs will help grow your loyal audience and prepare for the future.



**Focus on loyalty amongst single ticket buyers.** As representation of standard tickets in audiences have increased post-pandemic (page 8), placing an enhanced emphasis on multi-ticket sales is an excellent strategy to forge loyalty and replace some of the subscription loss. Programs such as first-timer offers, multi-ticket packages, and value-add experiences targeted to individuals who only buy single tickets will be fruitful. Consider that your single ticket buyers may be very different than your traditional subscribers—perhaps there is a new membership program that will work for them? [Do your research](#) to find out.

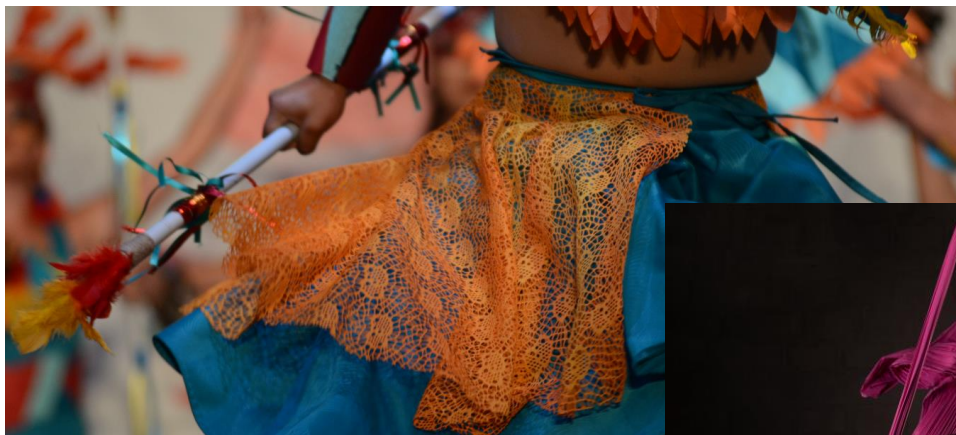
# Key Learnings (continued)



**CYO packages are a revenue driver—can memberships be a community driver?** Page 11 shows that CYO subscribers pay more per ticket—largely because CYO subscribers get less of a discount than fixed subscribers, and because people are generally willing to pay more to see exactly the shows they want. While memberships may (but not necessarily) bring in a lower yield, could they make up for it by driving community? Think of members as potential social influencers who have a key to your theatre to show their network the treasures inside.



**For opera and theatre companies: Are your fixed subscriptions underpriced?** The chart on page 9 shows that opera subscriptions dipped in average yield and theatre subscriptions have not yet matched their pre-pandemic average yield. Consider optimizing your subscription prices to make sure you aren't leaving money on the table—especially with the quickened pace of inflation post-pandemic. Keep in mind that research has shown that subscriber discounts are often not the motivating factor for subscribers.





# Where do we go from here?

As we move forward into 2024, let's get creative about how we leverage loyalty programs to grow our audience. Don't be afraid to diversify your loyalty offerings, but as you do so make sure you do research to understand your audience's behavior, attitudes, and desires to craft a loyalty program that will help you reach your goals.

**We're here to help you build an excellent loyalty program!**

Our expert consultants provide the analysis, insights, and strategy you need to develop effective loyalty programs for the future.

LET'S TALK

# Thanks to those who contributed to this study!

## Participating Organizations

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Find more resources and research at [jcainc.com/arts-marketing](https://jcainc.com/arts-marketing)

