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ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

Innovative Membership and Subscription Packages
01/19/22

About the Advisory Board for the Arts

1. ABA Forges Long-Term Partnerships ...



Trusted Advisors • Extension of Staff • Eyes to the World

2. Conducts Breakthrough Research Initiatives ...



Audience Growth



Donor Growth



Education Strategy



Optimizing Experience



Revenue Strategies

3. Offers Customized Support

- Application of new solutions
- Customization of new strategies
- Strategy planning and monitoring
- Short answer projects and networking

www.advisoryarts.com

Webinar Archive



Keeping Audiences Close: How Utah Symphony Appeals to Audience Values

December 9



Government Support for the Arts: Strategies for Success During COVID-19 and Beyond

October 14



Motivating Your Staff Through Crisis

September 30



Diversifying the Board: Setting, Communicating, and Attaining Critical Goals

September 16



Reopening Strategies: Lessons Learned from the Frontier

September 9



Creating Connectivity for Audiences During Closure

July 22



Loyalty and Revenue in the YouTube Universe

July 8



Great Performance Halls in the Future: Rebirth or Transformation?

June 23

(Requires Login)



Understanding Audiences: Early Results from Culture + Community in Time of Crisis Survey

June 17

(Requires Login)



Tourism and COVID-19: Lessons from Leading Museums

June 3 - co-host: SDA Bocconi

(Requires Login)



Is this the Amazon Moment for the Arts?

May 19

(Requires Login)

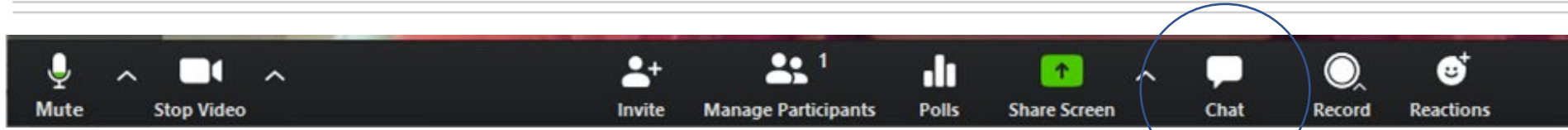


Surviving a Shutdown: Lessons Learned from Prior Closure

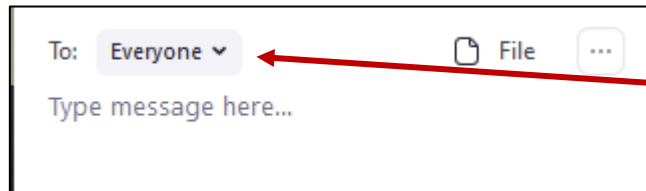
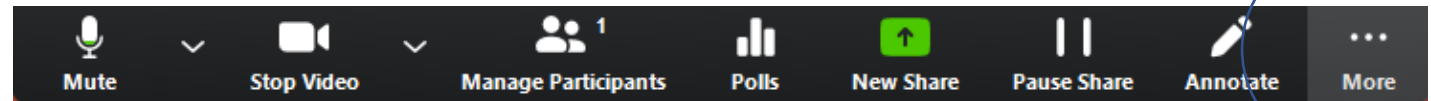
May 12

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How to Participate



Please use the chat box for your questions or comments. You may need to select “more” if it is at the top of your screen



You can send messages two ways:

- 1) Send to “everyone” for public comment or
- 2) Click the down arrow next to “Everyone” to send directly to **Lisa Swain** if you’d like it to remain private



Please use the chat box to introduce yourself and tell us where you are from (organization, location in the world)

Welcome to Our Participants

- Actors Theatre of Louisville
- Alley Theatre
- Arena Stage
- Aspen Film
- Berkeley Repertory Theatre
- Boston Ballet
- Bravo! Vail Music Festival
- Brevard Music Center
- Canadian Opera Company
- Chamber Music Society
- Charlotte Ballet
- Chicago Shakespeare Theater
- Chrysler Museum of Art
- Colorado Ballet
- Concord Museum
- Dallas Theater Center
- DeBartolo Performing Arts Center
- English National Opera
- Etobicoke Philharmonic orchestra
- Ford's Theatre Society
- Fraunhofer
- Grounds For Sculpture
- Houston Ballet
- Houston Grand Opera
- ICS
- Jacksonville Symphony
- La Jolla Playhouse
- Les Délices
- McCarter Theatre
- McCoy Artists Group
- Midland Center for the Arts
- Museo Egizio
- Museo Nacional Thyssen-Bornemisza
- National Arts Centre
- Newport Symphony
- North American Japanese Garden Association
- Northern Ballet
- Opera Theatre of Saint Louis
- Orchestra Sinfonica di Milano Giuseppe Verdi
- Philadelphia Ballet
- Portland Center Stage
- Richmond Ballet
- Richmond Symphony
- Round House Theatre
- Sammons Center for the Arts
- Sing Ireland
- Slover Linett Audience Research
- Spektrix
- St. Louis Symphony Orchestra
- Sydney Dance Company
- The Wallis
- UCLA Center for the Art of Performance
- University of Alabama in Birmingham
- University of Mississippi
- University of North Carolina at Greensboro
- Welsh National Opera
- Zeitz MOCAA

Our Guests



Steve Tate
Director of Marketing
Berkeley Repertory Theatre



Seth Macari
Associate Director of
Marketing
Berkeley Repertory Theatre



Kory Kelly
Chief Marketing &
Communications Officer
Pasadena Playhouse

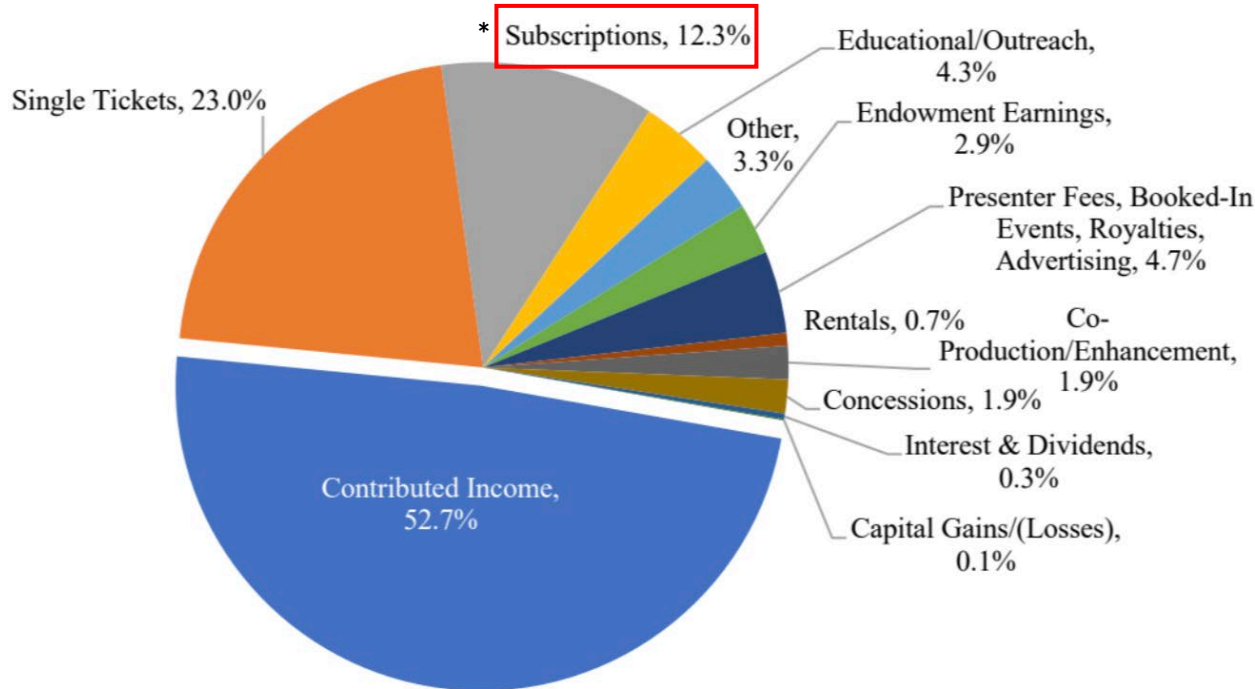
With Thanks: Those Interviewed for the Research

- **ZACH Theatre:** Drew Norbrig and Greg Garcia
- **TheatreWorks Hartford:** Freddie McInerney
- **Second Stage:** Laura DiLorenzo
- **Long Wharf Theatre:** Kit Ingui
- **Fifth Avenue Theatre:** Chris Marcacci
- **ACT: A Contemporary Theatre:** Gail Benzler

Low Subscription Income, Declining Subscriber Numbers

FIGURE E: INCOME AS A PERCENTAGE OF EXPENSES WITH EARNED INCOME DETAIL*

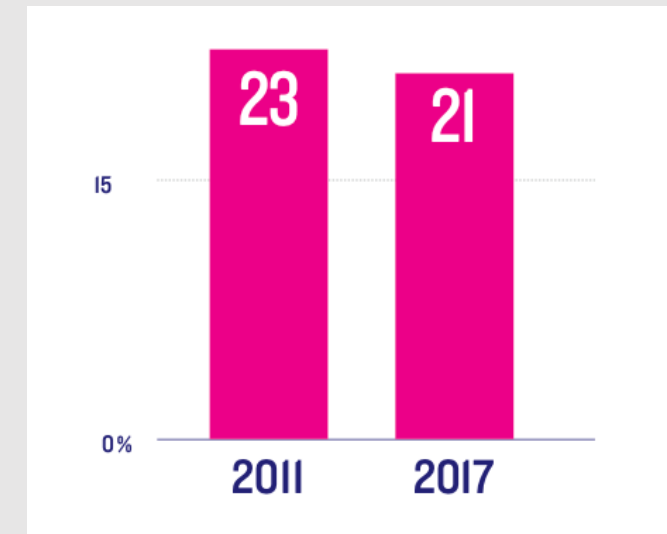
*Percentages total more than 100% because total unrestricted income exceeded total expenses.



Earned Income/
Expenses:
55.4%

*Subscriptions reflect both subscriptions and membership.

Percentage of Performing Arts Audiences Holding Subscriptions



While subscription income rose by 5.2% between 2015 and 2019, the average number of subscribers fell by 4.1% during this period.

Finding Answers in an Unusual Time

While the current environment makes it challenging to identify best practices...

“We are still seeing how the new program works. We will collect information for another year before being able to truly evaluate it.”

ZACH Theatre

“We’re still trying to figure out if we are comfortable with encouraging people to come [because of COVID-19]. We walked into this season with different expectations.”

TheaterWorks Hartford

...interviews did provide early answers to the following questions

1. Can membership and subscription coexist?
2. What is the right number or complexity of packages?
3. What is the best “membership” value proposition?
4. How can we best encourage members to attend?
5. What’s the best way to talk about membership as a new concept distinct from subscriptions?

Museums Also Starting to Innovate with Digital Memberships

	Eastman Museum	Springfield Museums	National Steinbeck Center	Harvard Museums of Science and culture	Museum of Art and Design
Price	\$40 for annual virtual membership	\$65 annually (discontinued Sept 2021)	\$30 annually	\$35 annually	\$75 annually
Benefits	<ul style="list-style-type: none"> Quarterly webinars with artists and curators Virtual Tours Access to online event archive Access to recordings of in-person events Bi-monthly e-bulletin E-news series 	<ul style="list-style-type: none"> Monthly recorded content Education activities recordings Book recommendations Behind the scene tours Activity Sheets Guest Lectures 10% discount in-person visits, store and café 	<ul style="list-style-type: none"> Archival Collection Behind the scenes tours and content Virtual Tours and virtual gallery views Access historic photos and video clips Weekly email with virtual events/ content Developing virtual member portal 	<ul style="list-style-type: none"> Discounts on online classes and programs Invitation to member only virtual programs and classes 	<ul style="list-style-type: none"> All-access to virtual member only events 10% discount at MAD store

Sourced from museum websites.

Three Main Value Propositions for Performing Arts Subscriptions

1

Supporting the
Organization

Annual Fund Replacement

2

Securing Fixed Seats

Assigned Seats
(traditional subscription model)

3

Attending with Flexibility

Flex-Pass

Ticket Voucher

Unlimited Access Pass

Ticket Discount Access

Value Proposition 1: Supporting the Organization

Annual Fund Replacement



Description

Mailing list providing exclusive access to discounts

User Benefits
(Beyond Discounts)

Exclusive access, latest news, social events

Challenges

Turning discounted ticket users into long-term subscribers

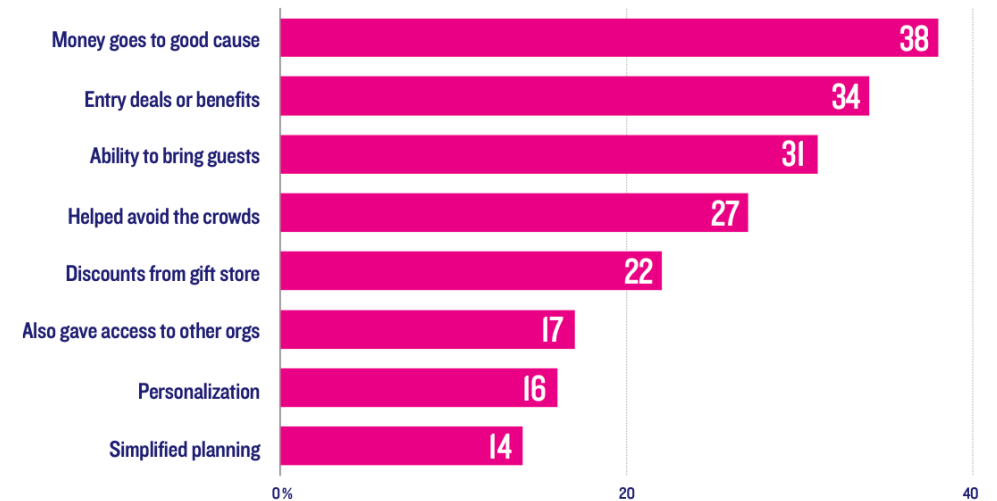
Full Sample Price

\$10
/month

\$100-1250
/annually

Note of caution: if orienting your loyalty program towards supporting your organization, it is key to separate it from your annual giving — as motivations for giving to both often overlap.

Motivators for Joining Loyalty Program



Source: [Culture Track Report - 2017](#)

Value Proposition 2: Securing Fixed Seats

Typical Subscription
(with assigned seats)



All-season access to the same seats/night each show

Fixed seats, access to curated season of shows; supporting the organization

Audience willing to commit to full season declining

\$278-\$498 /season

Description

User Benefits
(Beyond Discounts)

Challenges






Full Sample Price

Many organizations have this more traditional subscription structure, but Fifth Avenue Theatre has invested heavily in its program.

A Constant Investment in Subscriptions Maintained Loyalty at Fifth Avenue

- Unlike most theatres, Fifth Avenue did not see subscriptions decline pre-pandemic and maintained 20-25K subscribers/year.
- In the past, they have extended their productions, adding a third week of an initial two-week season, to allow single ticket purchases.
- Fifth Avenue typically uses known 'blockbuster' shows to sell new subscriptions before general availability. Subscriptions are typically priced such that the blockbuster show alone could justify the cost.
- Their full-season subscription (\$498) gives access to 5 Musicals and a radio-play podcast. They also have a 4-show subscription package (\$278).

Value Proposition 3: Attending with Flexibility

	Ticket Voucher	Ticket Discount Access	Unlimited Access Pass	Flex-Pass
		 		
Description	Pre-purchased single ticket vouchers	For-fee program that allows for future discounted tickets	Monthly or annual fee for unlimited access to shows/events	Package of 2-6 shows of your choice
User Benefits (Beyond Discounts)	Flexibility in when/how often you attend (not limited to seasons)	No need to commit to shows; early access	The ability to go frequently without paying more; last-minute ticket access	Only pay for the shows you want
Challenges	Typically, not as appealing because specific programming is not named	Requires additional work to get members to use benefits enough to renew	Monthly fee puts pressure on organization to provide value each month	Can undercut the traditional subscription program, best remedied by age limitations, etc.
Full Sample Price	\$45-\$85 /ticket	\$100 /year	\$40/month \$288/season	\$100- \$375 /4-show package

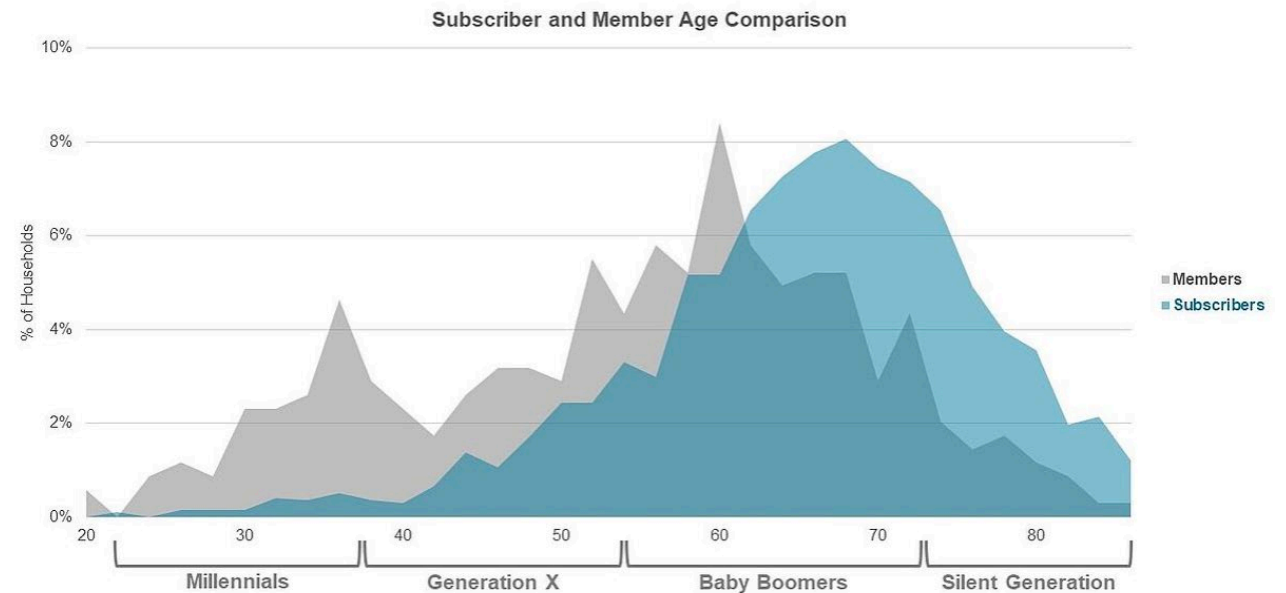
Flexible + Fixed Subscriptions Increases Overall Revenue

Capacity Interactive analyzed data for an arts organization who offers both a membership and a subscription to its audiences.

- Membership: early and exclusive access to single tickets
- Subscription: fixed seats to performances, with the option to add on membership

Subscribers who added membership had the highest annual ticket spend of \$653 and attended an average of 15 events per year.

Patrons who were solely members attended a slightly higher 16 events annually, but at \$321 their annual ticket spend was half of subscribers with membership.




Source: [Capacity Interactive - The New Duel: Subscriptions vs. Memberships](#)


Simplicity is Critical for Loyalty Programs Portfolio



Combinations Work
Two organizations have added a flexible option to a fixed-seat subscription



"We have found that the more we try to accommodate everyone, the less likely people are to commit. With ZACHXP, we wanted simplicity." Plan to continue traditional subscription for former subscribers but currently offer only one membership.



Pasadena Playhouse has a fixed-seat/ticket subscription (called "classic membership") along with membership package. "Before we were working with 10 different levels, now everything is much easier."

Flexible Members Need Encouragement To Use Benefits

The less structured a subscription package is, the higher the chance that patrons will need an extra reminder to use it — and then have a higher chance of renewing. Arts organizations have employed a variety of creative tactics to encourage subscribers with flexible ticket options to get the most from their subscriptions.



Pasadena Playhouse offers a discount ticket membership that requires separate ticket purchase.

For every show, when tickets go on sale, Pasadena sends two reminder emails per week. Their box office also calls every member to remind them to buy tickets.



During shutdown, American Shakespeare Center used text messages to remind audiences of their tickets to digital programs.



Knowing that too many options can be overwhelming, the **Minnesota Opera** identified specific seating areas for its special subscription for new audiences.

Reducing steps in the decision-making process makes it a frictionless process to purchase.

Our Guests



Steve Tate
Director of Marketing
Berkeley Repertory Theatre



Seth Macari
Associate Director of
Marketing
Berkeley Repertory Theatre



Kory Kelly
Chief Marketing &
Communications Officer
Pasadena Playhouse

Our *Spotlight* Newsletter Will Have the Recap & Replay

- All webinar registrants will be signed up for our *Spotlight* Newsletter. (You can unsubscribe by clicking the link at the bottom)
- The newsletter includes webinar summaries and recording links, benchmarks, data and resources, all on a new topic each week
- ABA members will have access to the full report on memberships in next week's member newsletter
- All webinar replays and *Spotlight* content is also available on our website www.advisoryarts.com

Advisory Board for the Arts

SPOTLIGHT

September 8, 2020

This week's Spotlight focuses on donor cultivation and engagement, as we look at the impact of extended shutdown on fundraising. Read on for benchmarks, a curated reading list and a special-edition Q&A with Richmond Ballet's director of development. Note: our webinars are back! Don't forget to [register for our Reopening Strategies session](#) tomorrow at 11:00 Eastern.

Benchmarks

Benchmarks on Donor Cultivation and Engagement

In the most recent ABA Arts Leader survey, we polled respondents on the current state of donor engagement at their organizations including the most effective messaging, the results of their coronavirus-specific campaigns, and their efforts to provide donors with new benefits during closure. Highlights include:

We Want Your Feedback



Transforming Arts Organizations Worldwide

Thank You
