

Performing Arts Subscription Payment Models:
From the Traditional, Annual Charge to a Monthly, Recurring Model

Dr. Anthony S. Rhine

Florida State University School of Theatre

540 W. Call, FAB 239

Tallahassee, FL 32306

arhine@fsu.edu

Abstract

Traditionally, performing arts subscriptions are purchased once a year where subscribers make a single annual payment. However, subscription sales are in decline. This study examined how subscriptions are generally paid in today's market, how arts users are purchasing today, and what means of paying for an arts subscription may lead to increased sales. Findings indicate that most subscriptions paid on a monthly, recurring basis, that consumers are more interested in purchasing subscriptions in this fashion, and that almost twice the number of arts attenders would be likely to purchase subscriptions if they were offered on a monthly, recurring basis.

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Introduction

Subscriptions have, for decades, been the lifeblood of nonprofit performing arts organizations in the United States. The problem observed, however, is that the traditional performing arts subscription model, most frequently defined as paying a large sum once annually for tickets to an organization's full slate of offerings during a year, is in decline (Iyengar et al. 2009). In fact, subscription ticket sales have been in decline across the arts for two decades (Voss et al. 2014). It has been regularly reported that this trend is occurring because younger audiences are too busy and unwilling to commit to specific performance dates and times (Mandell 2012), however in 1950, the average working American spent 1909 hours working annually. By 2012, that number had dropped to 1708 (Thompson 2014). The problem appears to be rooted in how time and money are used differently today than they were when arts subscriptions were in their heyday in the 80's and 90's (Bernstein 2007). The advent of the Internet has changed communication patterns (Lim 2014), which, in turn, has altered marketing and buyer behavior (Kotler and Armstrong 2013). The effect of social media on arts purchases, whether single tickets or subscriptions, appears to be a gap in the literature, and one worth exploring. Social media has a direct effect on how people choose to absorb information, though it appears to have no impact on news subscription purchasing behavior (Lim 2014), suggesting that the impact of social media is in correlation to use of time, but not necessarily to use of money.

Nevertheless, in order to function financially as they have for decades, venues offering performing arts products must determine new strategies to satisfy modern audience subscription needs, even if that requires replacing the traditional annual subscription payment model with other payment models more attractive to the audience.

The Purpose of the Study

The purpose of this research was to examine how changing the way arts patrons use their money to buy live arts experiences might increase sales. Specifically, this study examined how subscription fees are most frequently paid in today's market, how performing arts users are purchasing in today's market, and what means of paying for a performing arts subscription might lead to increased sales. Because the problem may stem from changing attitudes toward paying for leisure activities, this research considered responses to various models for subscribing to the arts in light of recent changes in other subscription models. The traditional arts subscription, which was based on a magazine subscription model, that is, pay once for a year's worth of service, has lost ground, while subscription models like those of Netflix, cable providers, and cellular service providers, where a rolling monthly fee keeps the buyer connected to the service, have prevailed. These subscriptions provide regular and consistent access rather than the traditional limited-access subscription. The purpose of the study is not to determine how arts organizations could or would provide consistent access, but to determine if there is a patron interest in the remuneration model in the arts. While it can be argued that the annual subscription still remains alive in magazine sales and YMCA memberships, those models are rapidly being encroached upon respectively by electronic communication and

the franchised gym, the latter of which functions on a monthly remuneration model which reports only 29% usage after six months (P.T. Direct).

App developers of every size seem to be looking to a monthly subscription model to sustain customers. Even Microsoft, with its Office 360 product, has developed a monthly model. Credit card issuers encourage buyers to make purchases and pay them off on a monthly basis. The challenge for most not-for-profit arts organizations is that they have become beholden to the subscriber. This steady-stream of pay-in-advance money is security for being able to complete the season. However, that stream has decreased in size and arts organizations are struggling (Iyengar et al. 2009; Mandell 2012). In his seminal work, Danny Newman developed a model for generating ever-larger subscription sales, eschewing subscription models other than a one-time purchase of a full season's slate of events (Newman 1977). However, it seems likely that in today's marketplace, arts patrons might be more interested in making remuneration for a full season's series of events if that remuneration was handled through small, monthly payments, keeping in alignment with current monthly subscription model trends.

Goals and Research Questions

Because the study opens a field of inquiry that has yet to be explored, and is an area which is too broad to develop an immediately narrow scope of focus, the qualitative process is appropriate (Denzin & Lincoln, 2008). The study was designed to determine the most frequently used models of payment by clients when purchasing a subscription, to determine the models of payment used most by patrons when purchasing subscriptions to the performing arts, and to determine what might occur if alternative payment models to performing arts consumers were made available for subscriptions. The study design

allowed for a focus on three specific research questions:

RQ1. What are the most frequently used models of payment when purchasing a subscription for goods/services?

RQ2. What are the most frequent models of payment used when purchasing a subscription for performing arts products?

RQ3. Would performing arts consumers be more inclined to purchase a subscription if alternative payment models were made available?

Background

The traditional once a year payment model was the most common method of payment used by patrons when subscribing to the performing arts in the United States as early as the 1970's (Newman 1977). Though still both prevalent and dominant today, the annual subscription model is slowly losing popularity (Iyengar et al. 2009). While there has been a decline in subscription sales, the American market has also witnessed a decline in overall performing arts purchases per capita, over the past two decades (Voss et al. 2014). While it has been argued that time restrictions have had a negative effect on arts sales, it appears that if that is the case, it is unrelated to workforce productivity, meaning the change has to do with lifestyle and discretionary spending decisions (Mandel 2012; Thompson 2014).

The argument that changes in leisure activities and time consumption have altered consumer behavior in the United States seems clearer (Roberts 1999). Central to those lifestyle changes is the Internet, which has greatly altered communication patterns among modern society when compared to communication of the pre-internet mid 20th century (Lim 2014). Change in communication patterns as a result of technological advancement

such as the Internet has altered buyer behavior (Kotler and Armstrong 2013). Changing buyer behavior, particularly in lifestyle and discretionary spending, affects performing arts subscription sales nationally.

Are Americans Busier?

The decline of performing arts subscriptions in recent decades has caused arts presenters to question and attempt to explain market decline. This has led to the development of myths such as the fallacy that Americans are now simply too busy to attend the arts. In fact, Americans are less busy than they have been since the topic has been examined (Thompson 2014). America is actually working less in the 21st century than it did in the 1960s, 1970s, and 1980s or even than it did in the agrarian-industrial economy. Generally, there is a global working hours decline, especially among developed countries, and America is no exception. Both office and at home work has decreased since the mid 20th century. Even time spent on housework and childcare has declined from 1965 to 2011 (Thompson 2014). It is also worth noting that in America the grossly wealthy appear to have less leisure time, while the working classes have increased leisure time (Darrah et al. 2006). Though it may be argued that the decline in subscription sales results from an increase in available home entertainment options that have increased in recent years, rises in single ticket arts purchasing behavior suggests Americans are not choosing to opt out of the arts, but are choosing to use them differently (Iyengar, 2009).

The Effect of Pricing on Performing Arts Subscription Sales

Although pricing of performing arts may affect the volume of performing arts subscription purchases, it is inappropriate to conclude that an increase in ticket prices will

decrease sales and a decrease in prices will cause an increase in the number of subscription sales (Colbert 2001). Consumer behavior regarding arts subscriptions has yet to be correlated directly to altered pricing structures, possibly because the arts subscription is a constantly changing product, and consumers seem to continue to purchase at traditional rates in the face of rising prices (Feldman and Cachon 2010). When Dean Gladden became the managing director of Houston's Alley Theatre in 2006, he increased the organization's artistic budget from \$5.2 million to \$6.4 million, requiring a substantial pricing structure alteration to increase earned revenue (Bent 2009). Gladden examined the organization-pricing model, and began by systematically increasing ticket prices over two years. Gladden was able to increase ticket prices as well as increase sales volume through a strategically designed reconfiguration of Alley's pricing scheme, which increased the volume of seats available at higher tiers (Bent 2009). Subscription revenue increased by 19%, and single ticket revenue increased by 77%. However, it is worth noting that this called for market-specific planning and thorough use of combined marketing and promotion initiatives. According to Gladden, "Subscribers always get the bests prices and best seats" and surprisingly, the highest-priced always sell first (Bent 2009). There is little doubt that continued finessing or product-pricing can lead to improved revenue, though finessing current pricing structures becomes less effective if the market has changed its attitude toward those structures. And even in a market where pricing may require finessing, an organization must embrace excellent communication both internally and externally for a strategy similar to that of the Alley to work (Bernstein 2007).

Studies focusing on consumer demand for performing arts tickets suggest that

demand is insensitive to price as long as consumers feel they have received appropriate value for their money. As a result, performing arts organizations continue to have some flexibility within limits to increase prices (Colbert et al. 1998). As early as 1974 it was noted that demand for theatre tends to be "particularly inelastic for plays that become the main theatre event of the season" (Colbert et al. 1998). It is no secret that the biggest "hit," will also be the biggest seller. Using the one blockbuster as an anchor for an entire season is what made the subscription platform so valuable (Newman 1977). Performing arts consumers have yet to hit a ceiling on what they are willing to pay for a hit (see Broadway's *Hamilton*).

In many cases, patrons are more concerned with perceived quality than prices when buying subscriptions and tickets for the performing arts. Perception of quality appears to be centered on nature of source material, overall standard of script, standard of performance and standard of design, more than ticket prices. While some arts consumers do demonstrate elasticity, those consumers are largely wealthier and more educated. Additionally, low-income subscribers and single tickets buyers are more process sensitive than high-income and extended ticket subscribers. Nevertheless, price of tickets and lack of time remain highly cited obstacles to theatre performances (Colbert et al. 1998).

The Effectiveness of the Subscription Model

Danny Newman, in his 1977 seminal work *Subscribe Now!*, argued that the most effective way for performing arts organizations to maximize sales was through subscriptions. However, by the time of his death in 2007, his approach for increasing performing arts revenue was viewed with more uncertainty. According to TCG's Theatre Facts, income from subscriptions in 113 theatres across the U.S had declined by 17.6%

over the next five years. American critics such as The Wall Street Journal's Terry Teachout use these statistics on the decline of subscriptions in the American theatre as evidence that subscriptions are old-fashioned and require new strategies to increase ticket revenue, arguing that many “under-50 Americans are too busy to commit in advance to attending specific performances on specific dates” (Mandell 2012).

Although the traditional subscription model has faced immense criticism in the past few years, there are a substantial number of performing arts organizations in America that feel the model is still the most efficient way of selling performing arts tickets. According to Kelvin E. Moore, former managing director of Arizona Theatre Company, the traditional subscription form is still effective for many theatres (Mandell 2012). Moore elaborates that the recent drop in subscription sales should not necessarily raise any red flags, as it may only be a sign that audiences want different experiences in the theater and that the goal should not be to kill or save the subscription model but to look for ways in which theatres can be more engaging with their audiences (Mandell 2012). At the root of Moore's argument is the understanding that how the performing arts are providing their product to consumers is no longer effective. One potentially beneficial change could be the altering of the subscription model.

According Rob Orchard of American Repertory Theater in Cambridge, MA., subscriptions made sense in the 1970s and 80s, and were actually the dominant model for selling tickets (Mandell 2012). Though Orchard adds that subscriptions are dying and not worth being used as a primary model for selling tickets in the 21st century by any artistic theatre in the country. Orchard advocates for membership because it continues to provide audiences a sense of belonging, maintaining loyalty (Mandell 2012). He argues that

subscriptions force theaters to remain under pressure to continue producing shows even when they are short of content, while the membership model give theatres freedom to “produce work only when they have inspiration to do so” (Mandell 2012). The main reason why theatres with a well-established subscription model program find it difficult to implement a different strategy is the challenge of changing from the model that maintains the loyalty of their audiences (Bernstein 2007). However, it is difficult conclude that subscriptions are completely ineffective and performing arts organizations are only continuing to use them due to fear of implementing changes.

Automatic Bill Pay and Consumption Increases

While it is a relatively new concept in the marketplace, the automated bill pay (ABP) process has gained immense footing for consumers. The research on the market effects of ABP is scant, though there is some evidence that the process actually increases consumption. A study conducted by Sexton (2015), finds that the introduction of ABP programs resulted in an increase in the consumption of energy by residential consumers at a rate of 4.0% and electrical consumption by businesses went up by about 8.1%. The study also suggests that ABP has had a similar effect on subscriptions to other utilities. The analysis on ABP and similar programs for budget billing implies these processes may mitigate a decline in price salience, contributing to an increase in the consumption of utilities. While there is no direct connection, the evidence suggests that a process such as ABP may increase subscription sales for the performing arts. Regardless of moral objections to increased energy consumption, the correlation between ABP and consumption of product appears to exist.

Factors Affecting Subscription Purchases

The costs associated with operating performing arts organizations have increased rapidly in the past few decades but audience size and revenues have remain stagnant, as global productivity continues to increase. Consequently, many performing arts organizations have faced an increasing need to raise ticket prices (Scheff 1999). And there is sufficient evidence to suggest that higher prices, though still holding strong for commercial, for-profit theatre may turn patrons away from nonprofit performing arts organizations (Scheff 1999). As our modern society adds additional expenses to the discretionary budget, such as Internet, cable, cellular telephone and Netflix bills, it seems likely the drop per capita in arts spending will follow suit. Even the lottery has affected leisure budgets (Keirney 2005). And social media sites are now looking to the monthly subscription model of newspapers to collect revenue from traditionally difficult to monetize content (Graybeal and Hayes 2011).

With the further exploitation of the monthly subscription model, and the rising costs associated with an entire season of the performing arts, it is no wonder the annual subscription payment model is faltering. Modern audiences that feel stretched by the lump-sum payment, have turned to the purchase of single tickets out of necessity, or are taking advantage of stretched or multiple payment plans (Scheff 1999). There is plenty of anecdotal evidence to suggest that modern audiences prefer to only attend certain events, though brand loyalty is not lost on the arts, and anecdotal evidence about consumers has been suggested to amount to useless stereotyping (Leventhal 1991). But even if there is a trend toward picking only specific events, there appears to also be a trend toward an inability to pay (Scheff 1999). How can a patron find hundreds of dollars worth of value in a product they will not consume for months, or perhaps as long

as a year-and-a-half?

Subscription Importance

Although there are contradicting arguments from different researchers on whether performing arts organizations should take subscriptions seriously or consider different strategies for raising revenue, it is important to note that subscriptions continue to prove more effective than other existing models (Petr 2007). Consumers as subscribers who continue to have long-term relationships with arts organizations enjoy a number of benefits, but further, the organization finds these subscribers are purchasing with more frequency, they tend to have more positive feedback about the organization, and they are utilizing competitors less. Additionally, subscribers are less likely to be wooed by competitors and can tolerate dissatisfaction for a long period time (Petr 2007).

Subscribers also ensure that seats are filled even during less popular productions unlike in the case of occasional ticket buyers where seats are filled only when there is a popular production or a famous artist. It is also worth noting that subscribers are the principal contributors to performing arts organizations and ensure that the organizations are stable even during low seasons (Petr 2007). From a marketing point of view, it is far more cost effective for performing arts organizations to market their new and existing products to subscribers because they are already known and identified by the institution. Moreover, when cooperation such as research or other communication is required, it is easy for the organization to contact subscribers over occasional ticket buyers as subscriber personal details are known to the organization (Tereyagolu et. al 2012).

Scope of the Study

The research involved both theoretical examination of literature in comparable,

subscription-based markets, and an empirical study in order to provide a holistic conclusion on the effect of changing performing arts subscription payment models from the traditional annual charge to a monthly recurring charge. The study was not designed to examine how to execute an appropriate methodology for collection of payment and distribution of services, but rather focused solely on the potential for increasing usage by altering subscription revenue collection. The study involved gathering of responses from a sample study population in order to identify impressions and feelings regarding annual and monthly recurring subscriptions, in both non-arts-related markets as well as in the performing arts. Information gathered during the study was analyzed to assess whether changing performing arts subscription payment models from the traditional annual charge to a monthly, recurring model could have any bearing on altering gross revenue.

Methodology

Data were collected from respondents across the United States through Amazon.com's mTurk online outsourcing platform. The mTurk platform allows the researcher to restrict respondents by geographical region, and in the case of this study, respondents were limited to the United States. In order to participate in mTurk research and assignments, individuals must verify geographical location, ensuring the accuracy of the data collection model (Adèr et al. 2011). Data were collected over a three-week period with 328 respondents participating (n=328). The survey was completed by 98% of respondents, with a 2% dropout rate. As a representative sample of the population of the United States, the study has a margin of error of 5.5%. A Qualtrix survey instrument was linked to the mTurk engine. Respondents were limited from repeat participation by the mTurk data engine, which tracks individual users who remain anonymous to the

researcher, as well as by the Qualtrix survey form, which tracks IP address. For completing the survey, respondents were paid 10 cents. Data collected were analyzed using quantitative statistical methods and findings recorded for presentation.

The mTurk system has been studied and considered to be a highly efficient and effective means for gathering data, with studies suggesting greater accuracy than traditional models such as social media data collection or the use of random student samples (Casler et al. 2013). Performance by respondents has been demonstrated to be superior to traditional survey methods (Hauser and Schwarz 2015), and the quality of data has been shown to be high (Buhrmester et al. 2011). Data were analyzed using the proprietary Qualtrix software.

Study Findings

Of the 338 respondents, 54% were female, and 46% were male. Children were excluded from data collection. Of the responding adults, 32% were in their 20s, 35% were in their 30s, 17% were in their 40's and 12% were age 50 and above. It is important to note that the sample contained participants largely younger than the traditional greying audience, and reflects a population that is less likely to predisposed to arts attendance. However, whether or not the sample had any predisposition to attendance did not alter the strategy of inquiring about arts and subscriptions usage and attitudes towards the monthly remuneration model. In fact, a sample more predisposed to attendance could likely present a bias in responses. The sample proved to be fairly well educated, with 48% possessing either a bachelor's or graduate degree, and 40% holding either an associate's degree or at least some college education. A full 26% of the sample population had household incomes over \$60,000, with 14% reporting incomes over \$80,000.

Subscription Purchases

When asked how many goods or services to which they subscribed, only 4% indicated they had no subscriptions. With a mean of 4.8, 6% of respondents indicated they held 10 or more subscriptions. Of the total 1305 annual subscription purchases reported, respondents indicated that 79% of those subscriptions are paid on a monthly, recurring basis. Other payment methods included once annually, through some system of rewards points, quarterly, bi-annually, through gift cards, or through various schemes of multiple payments. Further, respondents reported that that only 15% of their total subscriptions do not require a proactive cancellation. On-going, monthly subscriptions typically require a proactive cancellation, as opposed to the annual subscription model, which requires the seller to be proactive in renewing the subscription.

A full 45% of respondents indicated that they purchase tickets to the performing arts, and of that total, 16% indicated that they have purchased subscriptions to the performing arts with all of them indicating that they had to do so through the single annual payment. However, 54% of total respondents indicated they would prefer to pay for an annual subscription costing \$300 on a recurring basis at \$30/per month, which would add a premium of \$60 to the total cost of the annual subscription price. Only 23% of respondents indicated they would prefer to make payments to a credit card onto which they would place the full \$300 annual charge, with the remaining 23% indicating they would prefer to pay for the subscription outright.

Of the respondents who indicated they purchase tickets to the performing arts, 45% would prefer to make a payment of \$30/month through a recurring monthly subscription. In contrast, when considering future arts purchases, only 15% of the respondent pool indicated they would be somewhat likely, likely, or very likely to

purchase a single, annual subscription to the arts. The number of likely art subscription purchasers increased to 29% if they were given the option of purchasing that subscription through recurring monthly payments with a premium cost included. Interestingly, a full 21% of the sample population indicated they were unsure if they would purchase arts subscriptions through a monthly subscription model.

Monthly Subscriptions in Practice in the Arts

An exhaustive search for arts organizations currently offering a monthly subscription model yielded only a single result in A Contemporary Theatre (ACT) in Seattle, WA. The search included both Internet engine searches, and questioning of over 100 arts organizations via email both direct and through a snowball technique. No respondents were aware of any arts organizations offering a monthly recurring subscription, except ACT. ACT customer service manager, Scott Herman, indicated that their, “ACTPass program has been popular and by most metrics very successful” (Herman, 2016). While the ACTPass does provide some benefits similar to the traditional subscription, it is limited in what events are available through the ACTPass subscription, and therefore has been offered as an alternative to the traditional subscription model, but not as a substitute. Herman noted that the ACTPass, as a monthly subscription, is the only such arts subscription in the country of which he is aware. The ACTPass includes one entry for participants into all mainstage and lab productions, with deals and discounts for repeat attendance or entry to special events. Herman suggests that the age of ACTPass subscribers tends to skew toward a younger, less affluent clientele, though their exuberant loyalty toward the organization has made them an influential group.

Conclusions

In considering the first research question, "what are the most frequently used models of payment when purchasing a subscription for goods/services?" the data were clear. The vast majority of subscriptions in the United States today are purchased on a recurring, monthly basis, whether they are annuitized or on going. In fact, a full 79% of respondents indicate they purchase subscriptions on a monthly basis, with the remaining balance being no subscriptions, or payment methods that include the use of rewards points, or multi-payment, in addition to the single annual payment. Clearly, the American populace is accustomed to the monthly, recurring charge.

This stands in stark contrast to performing arts subscriptions, which, with one exception at ACT, appear to be charged as an annual lump-sum or divided payment requiring annual renewal, which speaks to the second research question, "what are the most frequent models of payment used when purchasing a subscription for performing arts products?" While performing arts producers search diligently for a means of engaging with their audiences and connecting with them at some level of relevance, it seems very likely that one key connection missing is the appropriate remuneration model. Arts presenters have made forays into adapting the subscription from a required collection of events to a build-your-own-subscription to a membership model, where paid members receive discounted tickets, but subscription sales continue to fall.

This leads to the third question, "would performing arts consumers be more inclined to purchase a subscription if alternative payment models were made available?" Almost half (45%) of art attenders indicate they would prefer to purchase arts subscriptions at a premium price, if the total charge were annuitized. In fact, nearly twice

as many respondents (29%) indicated likelihood for purchasing arts subscriptions if those subscriptions were offered on a monthly, recurring charge basis.

But beyond the likelihood that a monthly recurring charge could assist in increasing subscriptions sales to the arts, the monthly model shifts the burden of cancellation. Under the traditional annual charge model, the burden of renewal falls to the arts organization to ensure the patron continues to opt-in. Under the monthly model, the consumer becomes responsible for opting-out, and there appears to be an indication from ACT that the level of loyalty from monthly-model subscribers is incredibly high. Lastly, a full 21% of respondents indicated they were uncertain whether an available monthly payment model would be enough to induce them to purchase and arts subscription, leaving a vast amount of room for marketers to shift them into a position of likely purchasing behavior.

While this study did not explore the mechanics of the operation of a monthly, recurring payment for an arts subscription, it has opened the door to further study. Research is needed to explore appropriate and effective price structure to determine threshold levels. Further, because there is only a single organization currently offering a monthly subscription payment, future study is required to compare the effects of traditional subscriptions, monthly subscriptions, and memberships, to determine where their distinctions lie in the mind of the consumer. Additionally, though the sample population indicated a likely increase in arts purchasing behavior through a monthly remuneration model, further implementation and testing of such a model is necessary to determine if stated intentions would translate into action. Finally, broad exploration may

be required to find other new, useful, or emerging means for remuneration of performing arts subscriptions.

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