

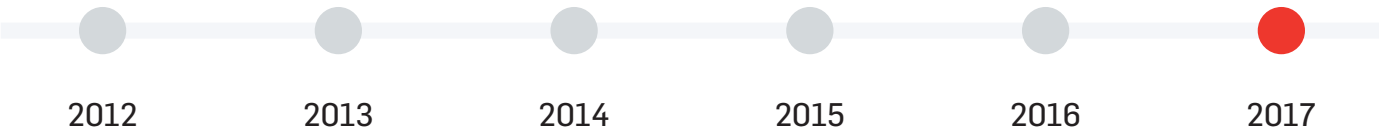
ARTS INDUSTRY DIGITAL MARKETING BENCHMARK STUDY

Findings from a Survey of 180 Arts
Organizations by Capacity Interactive

November 2018

Welcome!

For the sixth iteration of the Arts Industry Digital Marketing Benchmark Study, we took a fresh look at the data we collect and revamped our approach to more clearly focus on the metrics and key performance indicators that shed light on the state of digital marketing practices in the arts and cultural field. We added a level of rigor to our methodology to ensure we’re reporting the most meaningful data available, in a way that is relevant for a broad range of organizations. We’re grateful to the organizations who dedicated time and resources to respond to our survey and share this important information with the field.



What’s New

The new study creates a multi-purpose snapshot of digital marketing practices that will help organizations understand where they stand amongst their peers and that can be used as a tool to evaluate priorities and resource allocations. As the broader field of digital marketing evolves to keep pace with consumer behavior and available technology, we believe our study should reflect those evolving priorities.

Some of those themes you’ll see reflected in these pages include:

- ✓ Embracing a patron-centric outlook through collaboration across departmental lines¹
- ✓ Data and analytics flowing across departmental walls in organizations²
- ✓ Marketing serving a leadership role for website and digital-related infrastructure, data, and analysis³
- ✓ Assuming mobile-first is a given and embracing the importance of SEO⁴
- ✓ Developing stronger competencies for content production, data, and analysis⁵



Digital transformation is not elective surgery. It is the critical response needed to meet rising customer expectations, deliver individualized experiences at scale, and operate at the speed of the market.

-Forrester Research, 2018 predictions⁶

On the heels of the findings of the [Performing Arts Ticket Buyer Media Usage Study](#),⁷ this critical response to digital cited by Forrester is more relevant than ever for the arts. In that study we saw that all generations of ticket buyers are active online. But, with many organizations we work with placing a premium on cultivating younger generations of audiences to continuously replenish their well of loyal patrons, it's particularly noteworthy that younger ticket buyers use digital media more heavily and are even more mobile-centric than older cohorts of patrons.⁸

The Benchmark will continue to evolve to meet the needs of the arts and cultural field and we look forward to collaborating with you to broaden its value in the years to come. We're excited to take this journey with you and, with each subsequent installment of this study, see how our industry is responding and growing.

Erik Gensler
President, Capacity Interactive

With the debut of our new and improved Benchmark, we find ourselves at the starting line of what we hope will be an ongoing, collaborative effort with organizations in the arts and cultural industry to track digital marketing trends. As such, we begin with one survey’s worth of data, but look forward to future years when we’ll be able to chart changes in digital practices, resourcing, and outlook by comparing year-over-year trends.

As you read this report you’ll find a wealth of data ranging across all areas of the digital marketing domain. While the data can stand on its own (or needs limited explanation), it’s often enriched with some added context. We’ve added that context throughout this report in two ways- first, by sharing applicable knowledge we’ve gained through our work directly with arts and cultural organizations, and second, by seeking comparative data points and trends from the broader field. We hope this approach deepens the takeaways from the study data for this first year.

How to Read This Study

While we welcome you to tuck in and read this study cover to cover, you can also approach it as an on-demand reference manual for the state of digital in our field. A great place to start and gain an overview of all this study contains is the [Key Findings section](#). There, you can read the most critical takeaways and jump to the sections that interest you most.

Looking for something specific? [The Table of Contents](#) and [List of Figures](#) provide a detailed guide to the areas covered in these pages.

Throughout the introductory sections and the main content sections, use the navigation bar at the bottom of each page to quickly jump to the Key Findings, Table of Contents, or List of Figures; move to the beginning of the section you’re currently reading; or jump to the start of the next section.

You can explore endnotes by clicking on the superscript numerical notations throughout the report. When you’re ready to return to where you left off reading, click anywhere on the endnote citation to jump back.

As mentioned, we’ve added context to help enrich the data. This context falls in one of two general categories:

- CI Insights:**
provide editorial commentary on the data based on our first-hand client experience with arts and cultural organizations
- Connecting the Data:**
draws links between the study data and outside data, reports, or case studies that can help inform your decisions



The data presented in the report is generally cut in one or more of three ways: by all organizations, by operating budget, or by organization type. This is noted in the figure titles.

What Next?

If you’re anything like us, getting your hands on a report chock-full of data on every aspect of digital marketing is very, very exciting. But, we understand that as an arts organization with limited resources and a lot to accomplish, it can be daunting to prioritize takeaways and identify the smartest next steps. We encourage you to remember that transforming your organization’s approach to digital is an ongoing process and, wherever you currently stand, there’s a manageable path ahead. We’ll continue to provide resources to offer our perspective on ways to navigate it, including our [blog](#), [podcast](#), [free studies](#), and [classrooms](#), plus free evaluation tools for [analytics](#) and [SEO](#).

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Here’s a summary of the key takeaways you’ll find in these pages:

Digital Strategy Assessment

For the first time, the Benchmark survey asked organizations to assess the state of their digital strategy, both within the marketing department and across the organization as a whole. While 72% of organizations scored themselves at a 4 or 5 (on a scale of 1-5) in having an outlined and well-grasped digital strategy within their marketing department, only 51% scored themselves at a 4 or 5 (on a scale of 1-5) on the organization measure of a cohesive, organization-wide digital strategy that encourages cross-departmental collaboration and a patron-centric view.

CI Insight

Our work with clients affords us the opportunity to see that an integrated organizational digital strategy leads to greater resource efficiency, gains in patron development and retention, and stronger ROIs through more relevant, customized patron journeys. We also see that developing a cohesive strategy is no small feat and takes time and an alignment of priorities at all levels to break down artificial silos and share tools and data throughout the organization. As the market at large grows accustomed to seamless, personalized digital experiences across a given company, brand, or organization, we are eager to see how the field responds.



Improving Digital Marketing Practices

Hands down, the top area identified for improvement in digital marketing practices (identified by 73% of organizations) was analyzing data and harnessing it to improve digital strategy.

CI Insight

This top area for improvement is consistent across all budget categories and organization types, and points to data as a foundational element in developing that cohesive digital strategy in organizations.



Paid Media Allocations

Survey respondents reported that 30% of paid media was dedicated to digital and 70% was dedicated to non-digital media.

Connecting the Data

External data suggests that arts organizations are underinvesting in digital paid media compared to the broader marketing field. An eMarketer report indicates an average across industries of 38% of advertising spending was dedicated to digital methods in 2017, and it's forecasted to grow to 45% by 2020.⁹

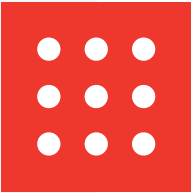


Digital Paid Media Channels

When it comes to digital paid media channels, responses suggest an almost universal embrace of the power of Facebook. 93% of organizations used Facebook Ads Manager, and it was the most commonly used channel across all budget sizes (87-100%). After Facebook, display advertising channels were reported most frequently: 77% of organizations used behavioral/content networks or programmatic display and 71% of organizations reported direct placements on websites, but both with great variability across budget sizes.

Connecting the Data

In our work with clients we see that direct placements are often more accessible to organizations with smaller budgets due to the lack of management involved (rather than optimizing campaigns based on performance, direct placements are more of a “set it and forget it” arrangement). But, they often lack capabilities such as behavioral targeting or tracking of purchase conversions, which can leave organizations without **data to evaluate the effectiveness of the ads**.¹⁰ It will be interesting to watch allocations in future iterations of the study compared to trends in the broader marketing field- when it comes to display, some see the future belonging to programmatic, with eMarketer predicting that nearly 84% of digital display ad dollars will transact programmatically by 2019.¹¹



Search Engine Marketing & Optimization

Reports of having and using a Google Grant correlate with budget size, which means that those who could benefit most from free media dollars are using them least. Rounding out the search picture: only 36% of organizations reported allocating paid digital media to paid SEM and, in aggregate, 60% of organizations attend to SEO only once per year or less frequently, or do not invest time or resources into SEO at all.

Connecting the Data

Long serving as the critical foundation for search efforts amongst organizations in the field, the Google Grant program¹² has undergone many changes in the last year that require that not-for-profits everywhere recontextualize the program as part of a broader search strategy, including paid SEM and SEO, and resource accordingly.¹³ With that in mind, harnessing the free Grant dollars allows organizations to stretch their real media dollars further to maximize the impact of paid SEM.



Website Traffic Metrics

The reported number of overall website visitor sessions correlates with operating budget size but, strikingly, the percentage of mobile visitors does not. In fact, the average percentage of website visitors that arrived via mobile was 43% and the averages for each operating budget size only varied between 41% and 44%. Furthermore, mobile visitation was remarkably consistent across all volumes of website visitors.

CI Insight

The very clear takeaway is that mobile is relevant to every organization, no matter the operating budget or volume of website traffic. Failing to prioritize your mobile experience is akin to keeping half of the doors into your facility closed and locked.



Mobile Optimization Practices

While 78% of organizations indicated that they’ve adopted a responsive site design, ongoing mobile optimization efforts are sparse. This finding is particularly noteworthy in light of the universal relevance of mobile to all arts and cultural organizations.

Connecting the Data

Given the study data (see Figure 4.2) showing that the mobile website experience forms much of the backbone of the online patron experience, prioritization of staffing and resources for mobile optimization is at a critical juncture. Future iterations of this study will shed light on the pace of mobile usage growth amongst patrons on industry websites, but the trajectory is clear: mobile excellence needs to be synonymous with website excellence.¹⁴



Website Strategy & Leadership

We asked how organizations are informing their new site designs and found that, overall, patron-focused and data-informed inputs do not lead the charge. For example, whereas 62% of the surveyed organizations said they considered internal needs and priorities in their latest website redesign, only 25% utilized analytics data. In fact, the use of analytics data was only slightly more common than drawing on the opinions of leadership and board members (selected by 24% of the respondents).

CI Insight

Analytics and patron-provided inputs are so important because they put the user first. Yet, some of the most data-centric elements were used the least- only 9% used market research, 7% used audience surveys/research (i.e., more formal than anecdotal feedback), and 1% used A/B testing. Website redesigns are crucial to organizational success, but they’re not guaranteed to be successful on their own. Given the investment of budget, time, and energy that goes into a redesign, and the infrequency with which they occur, organizations must do all in their power to position them for success.



Connecting the Data

We learned from the [Performing Arts Ticket Buyer Media Usage Study](#) that 77% of respondents indicated that they visited the study partner’s website to read about upcoming programs and 74% visited to purchase tickets.¹⁵ Yet, in total, only 52% of organizations indicated that the marketing department leads decision making for strategy, planning, updates, and redesigns for their website. Another 37% indicated that they have significant input, but do not have the leadership role for the website. Not only is the website a foundational marketing tool, it’s central to achieving broader organizational goals- from developing patrons and an understanding of your mission to delivering on contributed and earned income. Marketing must play a leadership role in positioning the website as such and providing guidance for achieving organizational goals in a cohesive way.



Email Metrics & Practices

Organizations reported that pre- or post-performance, exhibition, or event emails, as well as triggered emails based on patron behavior, yielded impressive open rates ranging between 44-50%. This range is far above the average 26% reported for more commonly used newsletters or promotions.

CI Insight

Email is an ideal platform to showcase the power of compelling, customized content and the strategic use of data. Despite this capacity, the data shows that organizations are not widely embracing the email practices, such as detailed segmentation and triggered cascades based on changes in relationship, that are necessary for the email types that perform best. Growing these practices is a “low hanging fruit” opportunity for organizations to reach engaged patrons with anticipated, relevant, and personal email content.¹⁶



Content Customization & Production

Looking at how frequently organizations are customizing content for patrons across platforms we see that, in aggregate, the largest proportion of organizations (32%) reported that they customize content only somewhat consistently across most of their digital channels. And, 40% reported a lower frequency and scope than that.

CI Insight

Given that content is at the heart of all we do as digital marketers, this is an area worthy of greater prioritization. By far, the most frequently cited barriers were that staff is spread too thin and there's inadequate budget (reported by 91% and 61% of organizations, respectively). The third and fourth most reported barriers also merit consideration: 36% reported inadequate infrastructure (such as website functionality or technical tools) and 31% reported staff lacking adequate skills/training. While the leading two barriers are present for the majority of organizations, long-term growth in this area will likely entail not only allocating staff time and budget to content, but organizations thinking more broadly with their infrastructure investments and staff training opportunities—particularly if more staff time and budget are made available to attend to this priority.



Video Production

The number of videos created by organizations suggests that the field has taken note of the power of the medium. Between 81-100% of organizations with budgets greater than \$5 million created ten or more videos per year. Reports of video creation increase steadily across budget sizes, with a notable jump for those with budgets greater than \$10 million: between 44-89% of those organizations reported creating more than 30 videos per year. Video creation was most sparse for smaller organizations: 45-54% of organizations with operating budgets less than \$5 million created fewer than ten videos per year.

Connecting the Data

When it comes to video, the arts are the envy of most industries- we have an embarrassment of riches in terms of compelling content at our disposal. More and more, video is a key form of communication with patrons- according to Forbes, 90% of customers report that product videos help them make purchasing decisions and 64% are more likely to buy a product online after watching a video about it. Marketers in the broader field are responding, with 87% using video content in their digital marketing strategy and dedicating 35% of online ad spending to video.¹⁷ Videos don't have to be professionally produced- empower staff to get creative with the tools on hand and open up your world to your patrons.



Data Analysis & Use of Data in Adapting Digital Strategy

With knowledge that the majority of respondents identified data analysis and the use of data in digital strategy as a key area for improvement for digital marketing in their organizations (see Figure 1.5), we turn to look more closely at the specific barriers to analyzing and using data. A resounding 80% of organizations reported that staff is spread too thin. Limitations around staff skills and training followed at 48% and difficulty getting data from platforms rounded out the top three, chosen by 41% of organizations. Of note, budget came in at a distant fourth (16%).

CI Insight

With the data that staff and skill-related challenges were reported most frequently, it's interesting to note that only 57% of organizations reported that team members completed professional development/training for data reporting, analysis or related skills, 26% reported that no opportunities were available in their organizations, and 17% didn't take advantage of available opportunities. Growth in this area will likely require a leadership-embraced shift in organizational outlook on these critical practices.



Overview

As in the past, we conducted our Arts Industry Digital Marketing Benchmark Study via online survey, collecting data from March 26 - May 7, 2018. In previous iterations of our Benchmark Study recruitment was limited to organic responses received based on emails, sent to our database of both clients and non-clients, and the reach of our social media. For the new survey, in order to ensure that our sample reflects a broad cross section of the sector, we set targets for the number of responses from different arts disciplines and operational budget sizes. To reach those goals, in addition to soliciting participation via our database of client and non-client organizations and social media reach, we worked with several arts service organizations and industry partners to more broadly publicize the opportunity to participate in this free study.

We incentivized early participation through the raffling of one ticket to our 2018 Digital Marketing Boot Camp for the Arts conference. After the initial data collection period of March 26 - April 13, we followed up directly with specific organizations to solicit participation from select categories (based on discipline and/or budget size) in order to create stronger sample sizes amongst those category cohorts.

In the interest of consistency and to facilitate ease in accessing data amongst organizations, this year we shifted our data collection to be based on fiscal year. As such, any specific data inputs (e.g., budget figures or digital platform performance metrics) are reported for fiscal year 2017, as defined by the respective organizations. Any survey questions about ongoing practices were asked based on current practices within the organization at the time of the survey. We provided detailed guidance for all questions, as needed, to ensure data quality. We were available via email and phone to all organizations for any questions about the survey, again to promote clarity and ensure accurate data. In several instances survey takers contacted us to clarify how we were defining key terms or how to calculate or find specific values that were requested on the survey. Our goal is to track trends in the industry over time, and we hope these steps will lessen obstacles for continued participation amongst organizations in the years to come.

Due to interpretation limitations inherent in category cohorts of small numbers, we restricted our study to organizations reflected in the sample description below. While we were not able to include service organizations or those organizations that focus primarily on classes, workshops, or training programs, we hope to develop more robust cohorts of respondents in those categories in future years. With these parameters in place, we analyzed responses from 180 organizations. Of those organizations, fewer than half of the respondents (49%) are CI clients.

While this is not a representative, random sample of all arts organizations in the statistical sense, we believe it is the largest and broadest data set on the topic and provides a good cross section of arts organizations in North America (99% of organizations are from North America and 1% are from Europe. A list of participating organizations can be found at the end of this report.) We hope it will bring value and further our collective goal of sustaining this vibrant field.

Sample Description

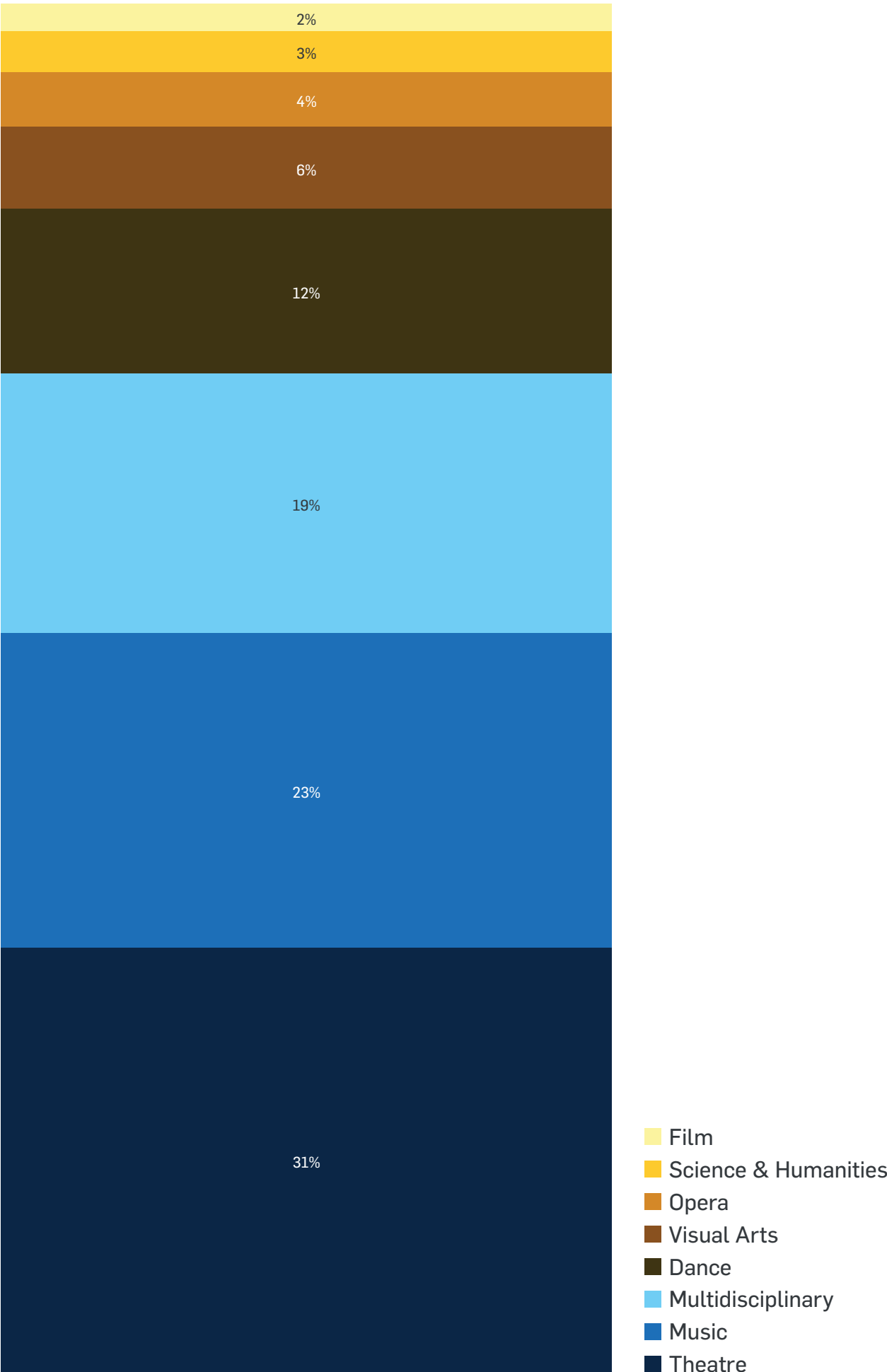
This section contains an overview of the sample of organizations that participated in the Arts Industry Digital Marketing Benchmark Study.

Respondents reflect a broad range of arts and cultural disciplines, but the greatest proportion of organizations fall in the theatre, music, and multidisciplinary categories. In future years, as cohort sizes increase, we hope to be able to analyze the data based on discipline cohorts.

Figure M.1

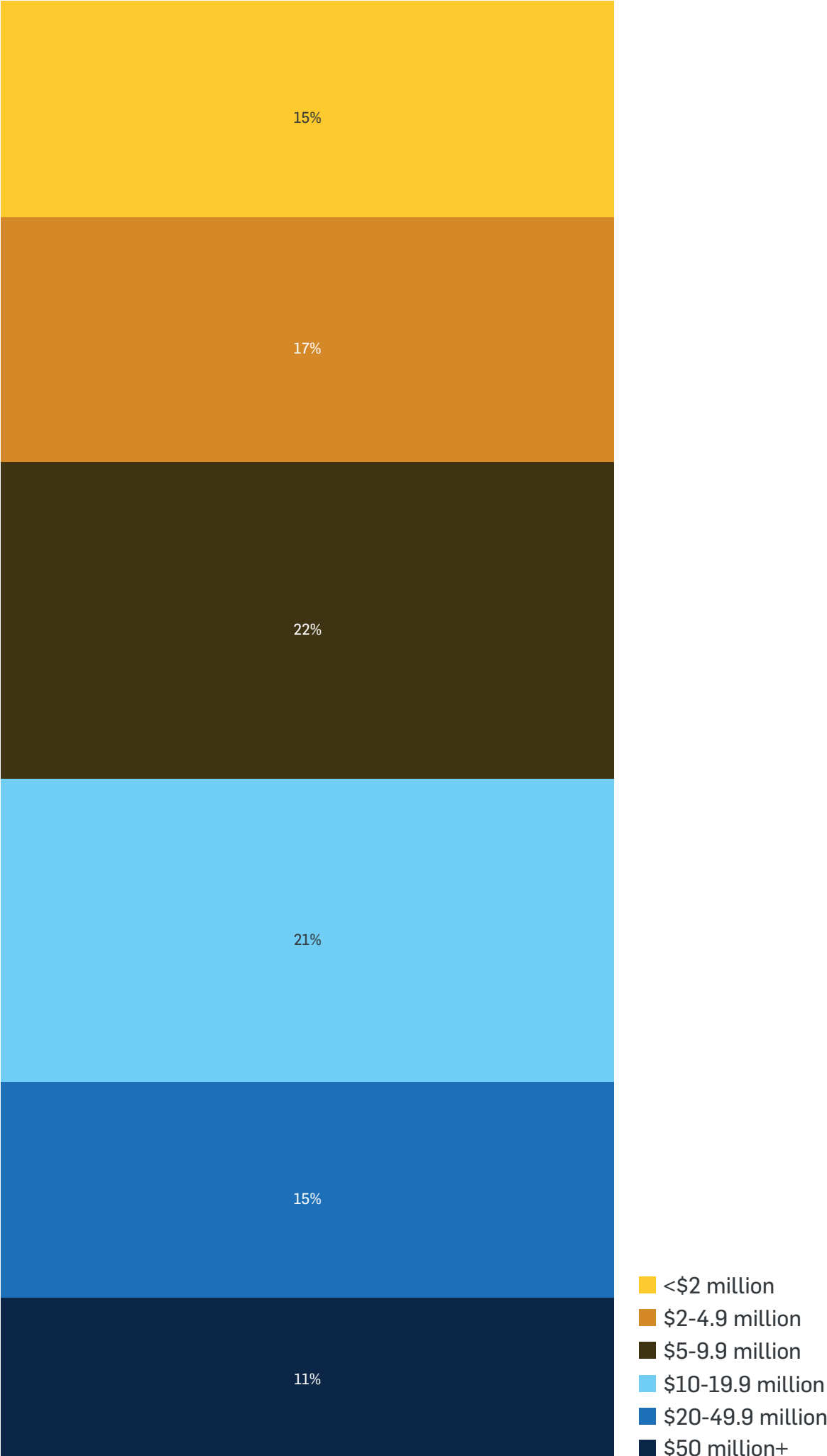
Organizations Included in This Study, By Discipline

n=180



Respondents represent a wide range of budget sizes. As noted in the Methodology Overview, we conducted targeted recruitment of organizations based on budget categories that were underrepresented after the initial open recruitment phase, in order to get a strong range of budget sizes. Operating budget, along with organization type, is one of the main ways we analyzed the data this year.

Figure M.2
**Organizations Included in This Study,
by Operating Budget**
n=180



Organization type was a new way in which we analyzed data for this year’s study. In order to create cohorts of meaningful size, we placed organizations into one of three categories based on their operating model:

1. Performing Arts Producers

The majority (>50%) of their work is produced in house, but some may be presented. Includes producing festivals.

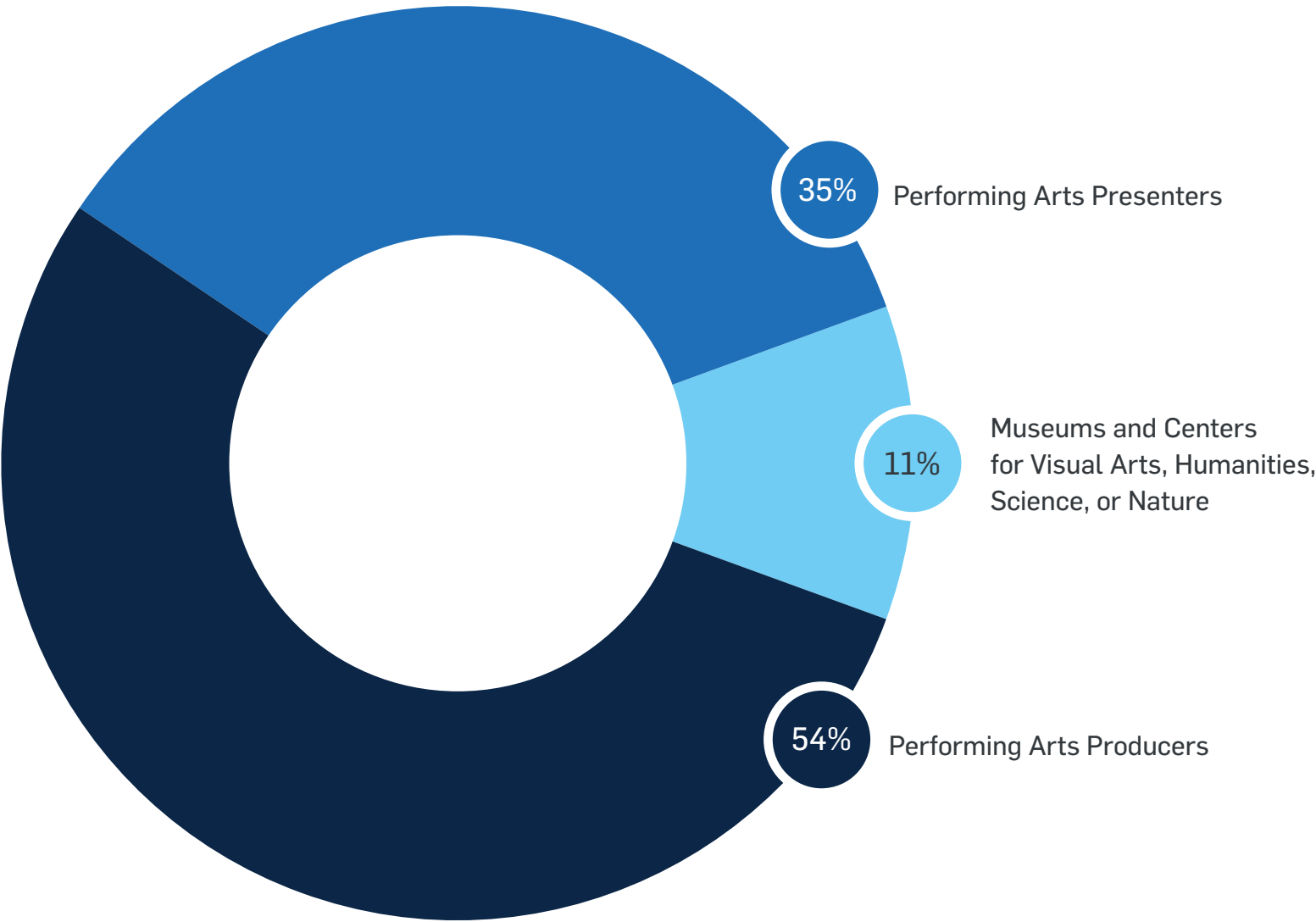
2. Performing Arts Presenters

The majority (>50%) of their work is presented, but some may be produced. Includes presenting festivals.

3. Museums and Centers for Visual Arts, Humanities, Science, or Nature

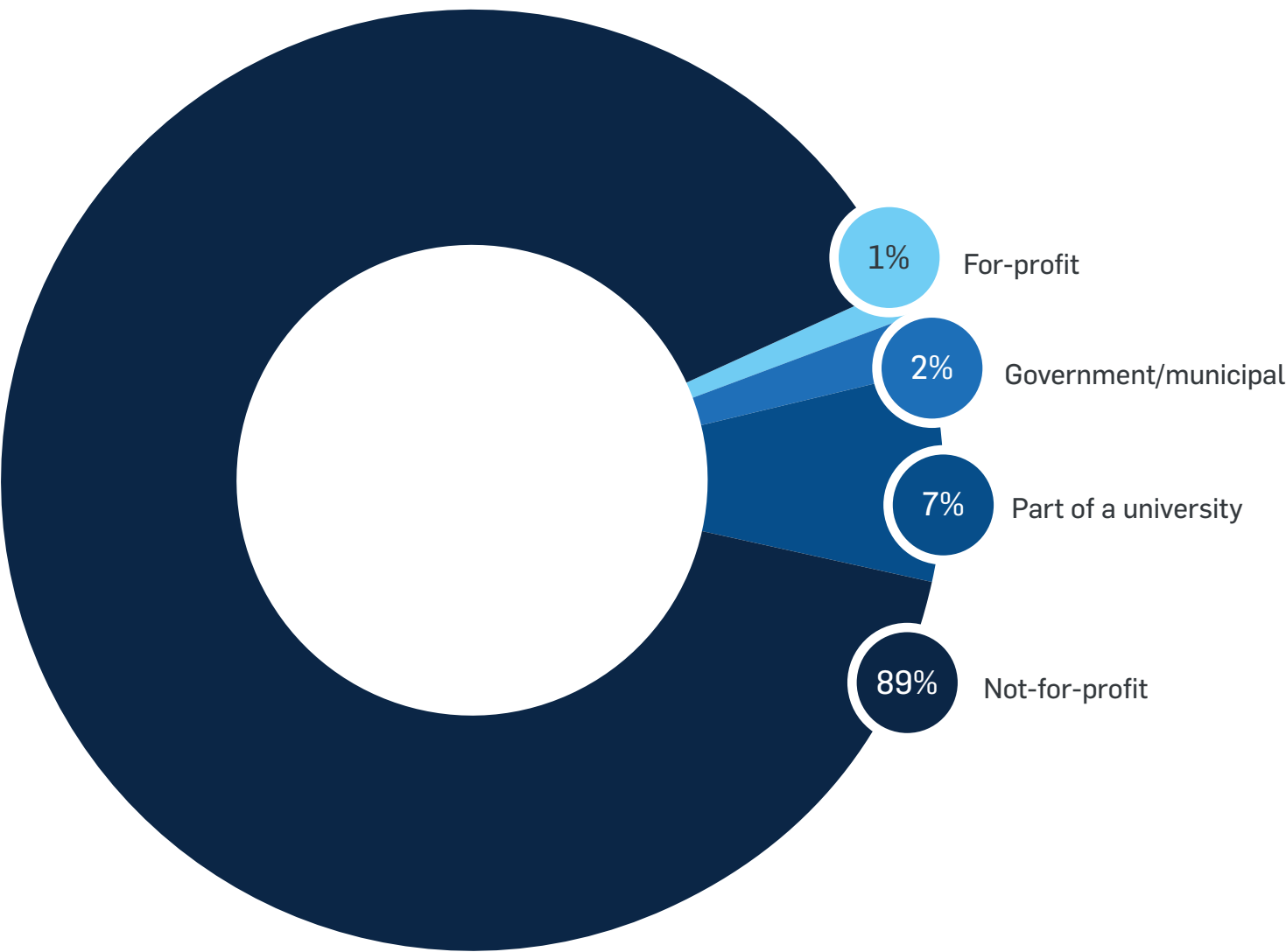
All budget categories are well represented for Performing Arts Presenters and Producers, and Museums/Centers skew slightly larger (average operating budget sizes are \$19.3, \$18.5, and \$22 million, respectively). In terms of other differences observed between these category types, Museums/Centers have a much lower marketing budget to operating budget ratio than Performing Arts Presenters or Producers, which holds with expectations given their expense structures.

Figure M.3
**Organizations Included in This Study,
by Organization Type**
n=180



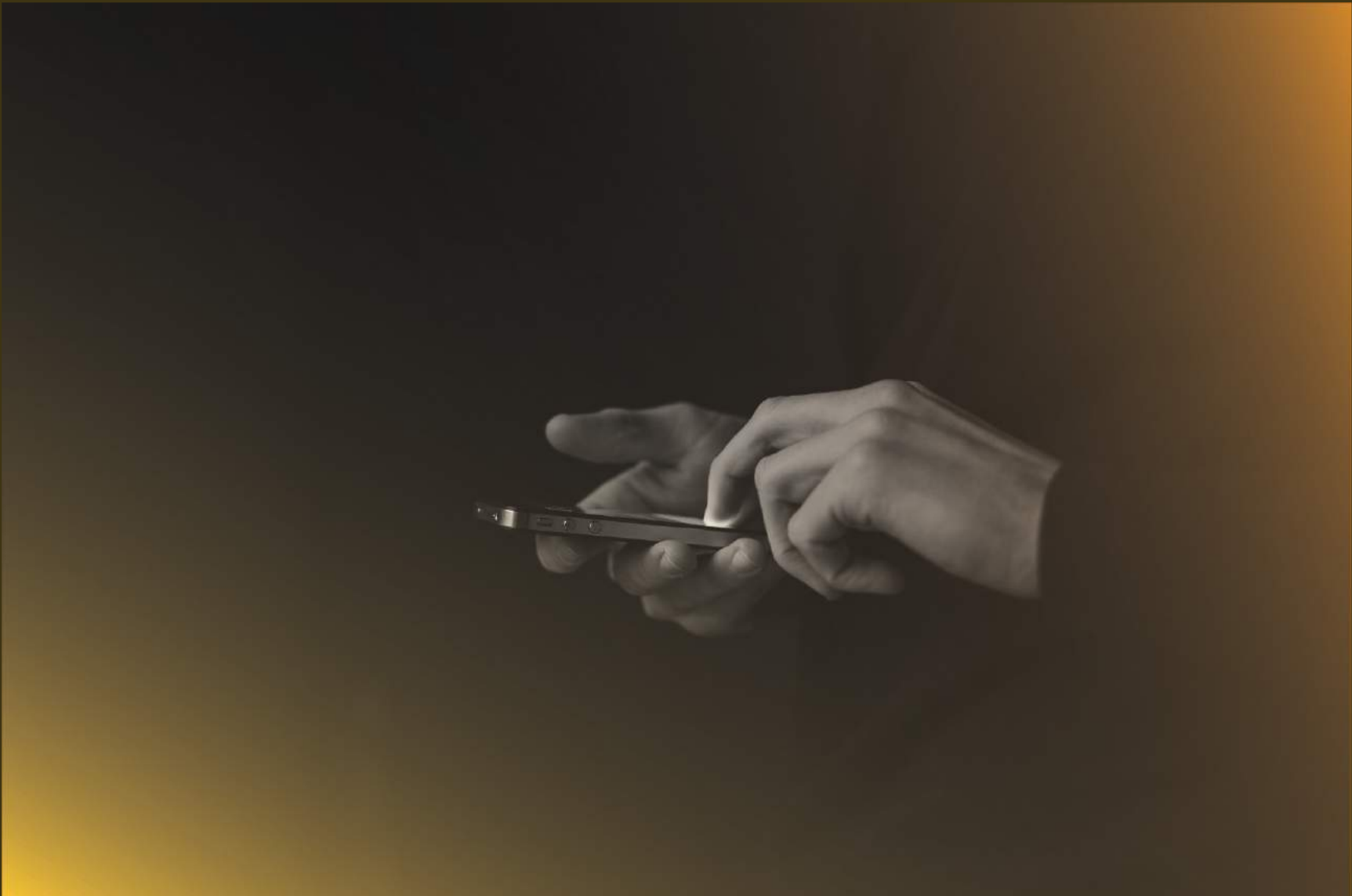
The vast majority of respondents (89%) are not-for-profit organizations. Only two for-profit organizations took part- one a jazz presenter and the other a performing arts center.

Figure M.4
**Organizations Included in This Study,
by Tax Status**
n=180



In This Section: Digital Strategy

Outside of the arts, top marketers are embracing an organizational digital strategy rooted in shared data that gives a holistic view. In a 2017 joint study by Google and Econsultancy, leading marketers (defined as those whose results significantly exceeded their business goals) were 50% more likely to have a clear understanding of customer journeys across channels and devices, and twice as likely to routinely take action based on analytical insights. Tellingly, 86% of all respondents in the Google/Econsultancy study said eliminating silos is critical to expanding the use of data and analytics in decision-making. As summarized in an MIT Sloan Management Review report, five key ingredients were identified as fostering this approach: executive buy-in, data-savvy marketers, cross-functional collaboration, a learning culture, and an investment in technology.¹⁸ We hope this Benchmark Study generates conversation about organization-wide digital strategy and breaking down silos around data and patron relationships.



Jump to the Data

- Digital Strategy Ranking Within the Organization’s Marketing Department >
- Digital Strategy Ranking Across the Organization >
- Greatest Area for Improvement for Organization’s Digital Marketing Practices >

Key Finding: Digital Strategy Assessment

For the first time, the Benchmark survey asked organizations to assess the state of their digital strategy, both within the marketing department and across the organization as a whole. While 72% of organizations scored themselves at a 4 or 5 (on a scale of 1-5) in having an outlined and well-grasped digital strategy within their marketing department, only 51% scored themselves at a 4 or 5 (on a scale of 1-5) on the organization measure of a cohesive, organization-wide digital strategy that encourages cross-departmental collaboration and a patron-centric view.

CI Insight

Our work with clients affords us the opportunity to see that an integrated organizational digital strategy leads to greater resource efficiency, gains in patron development and retention, and stronger ROIs through more relevant, customized patron journeys. We also see that developing a cohesive strategy is no small feat and takes time and an alignment of priorities at all levels to break down artificial silos and share tools and data throughout the organization. As the market at large grows accustomed to seamless, personalized digital experiences across a given company, brand, or organization, we are eager to see how the field responds.



Key Finding: Improving Digital Marketing Practices

Hands down, the top area identified for improvement in digital marketing practices (identified by 73% of organizations) was analyzing data and harnessing it to improve digital strategy.

CI Insight

This top area for improvement is consistent across all budget categories and organization types, and points to data as a foundational element in developing that cohesive digital strategy in organizations.



Section Detail

72% of organizations scored themselves at a 4 or 5 in having an outlined and well-grasped digital strategy within their marketing department. A closer look shows room for growth. While 18% of respondents reported a score of 5 (indicating a clearly outlined and understood digital strategy), slightly more respondents reported a score of 3 (signifying that their digital strategy isn't understood or used by their full marketing team). And, 54% of organizations scored themselves in between at a 4. This may indicate that, even within the marketing department, for the vast majority of organizations silos exist and/or clarity is lacking in their approach to digital strategy.

In contrast, only 51% scored themselves at a 4 or 5 on the organization measure of a cohesive, organization-wide digital strategy that encourages cross-departmental collaboration and coordination on campaigns. That means that 49% of organizations are not taking an approach to digital communications that fosters a patron-centric outlook across their organization.

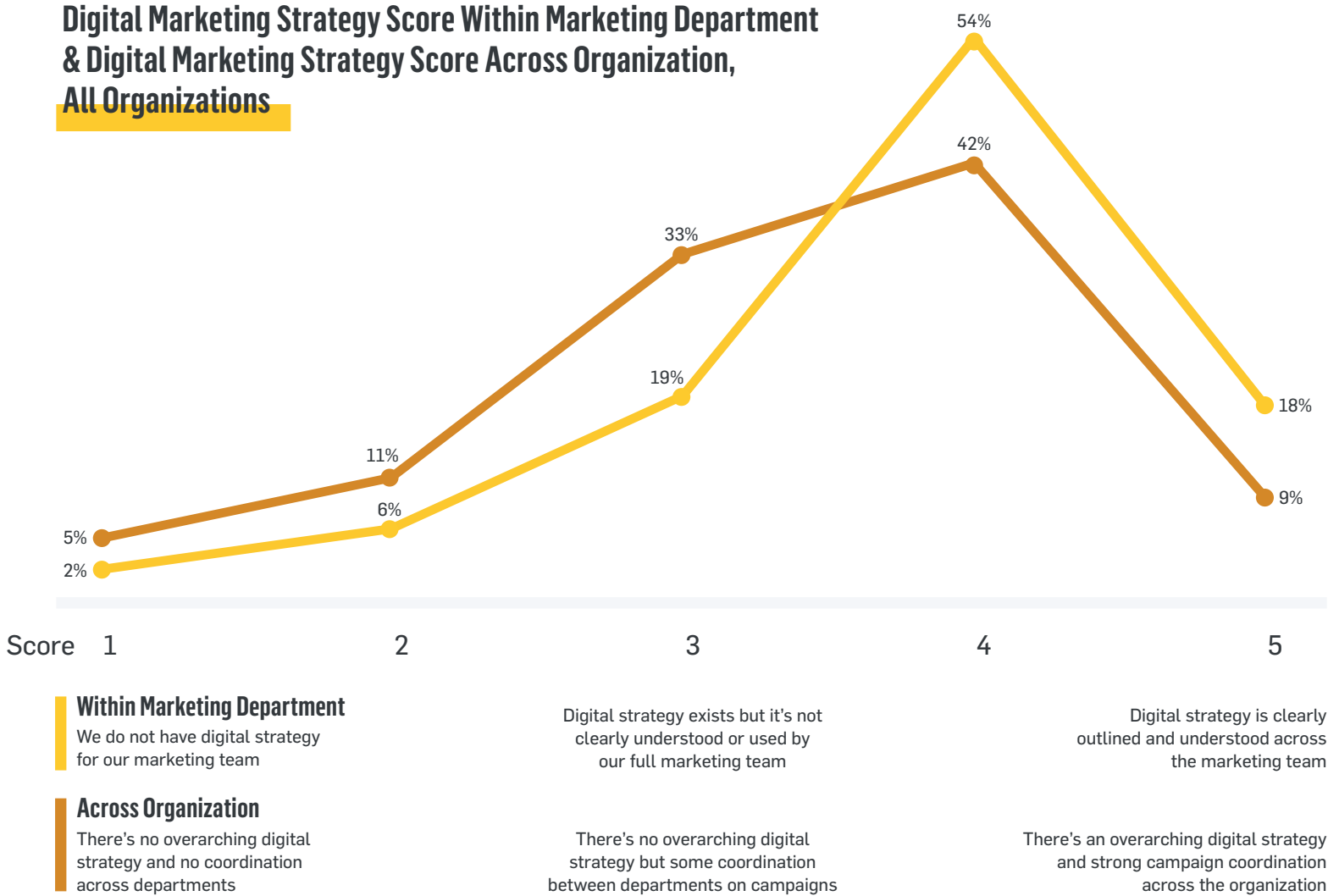
CI Insight

In our client work we've seen why a patron-centric outlook matters—patrons view your organization as one entity and they expect that, as an organization, you understand the nature of their relationship with you. Communications must be coordinated across your organization so that patrons receive relevant, well-timed, and cohesive messaging across departments, whether serving the particular goals of marketing, membership, fundraising, or education.



Figure 1.1

Digital Marketing Strategy Score Within Marketing Department & Digital Marketing Strategy Score Across Organization, All Organizations



While larger organizations tend to report a higher strategy level (both in departmental score and organizational score), it's not a completely linear relationship- meaning that good strategy isn't solely the domain of larger organizations. Based on the scores reported by organizations, as a field we can improve by developing a broader view on digital strategy crossing departmental lines throughout the organization.

Figure 1.2

Digital Marketing Strategy Score Within Marketing Department,
by Operating Budget

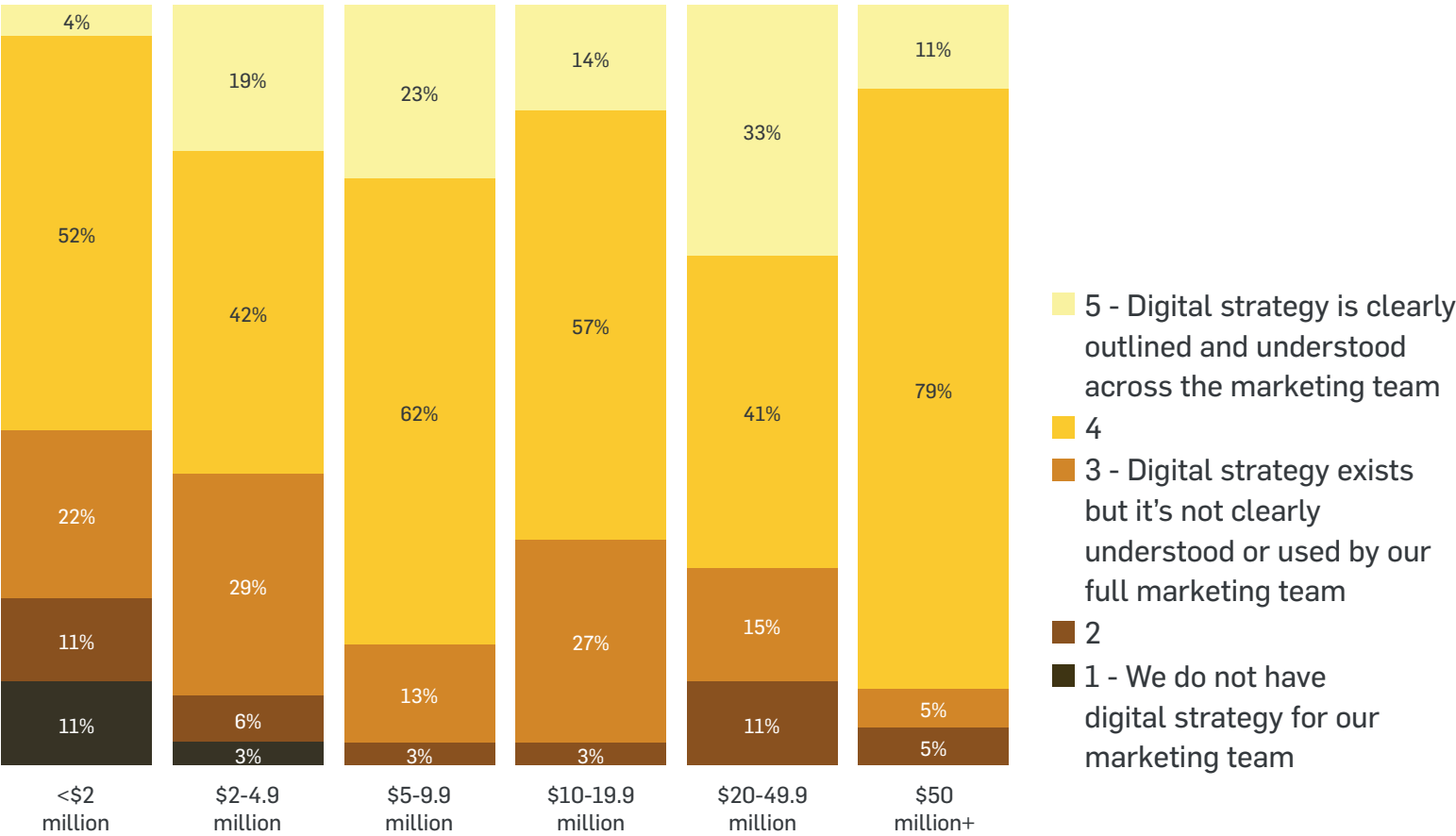
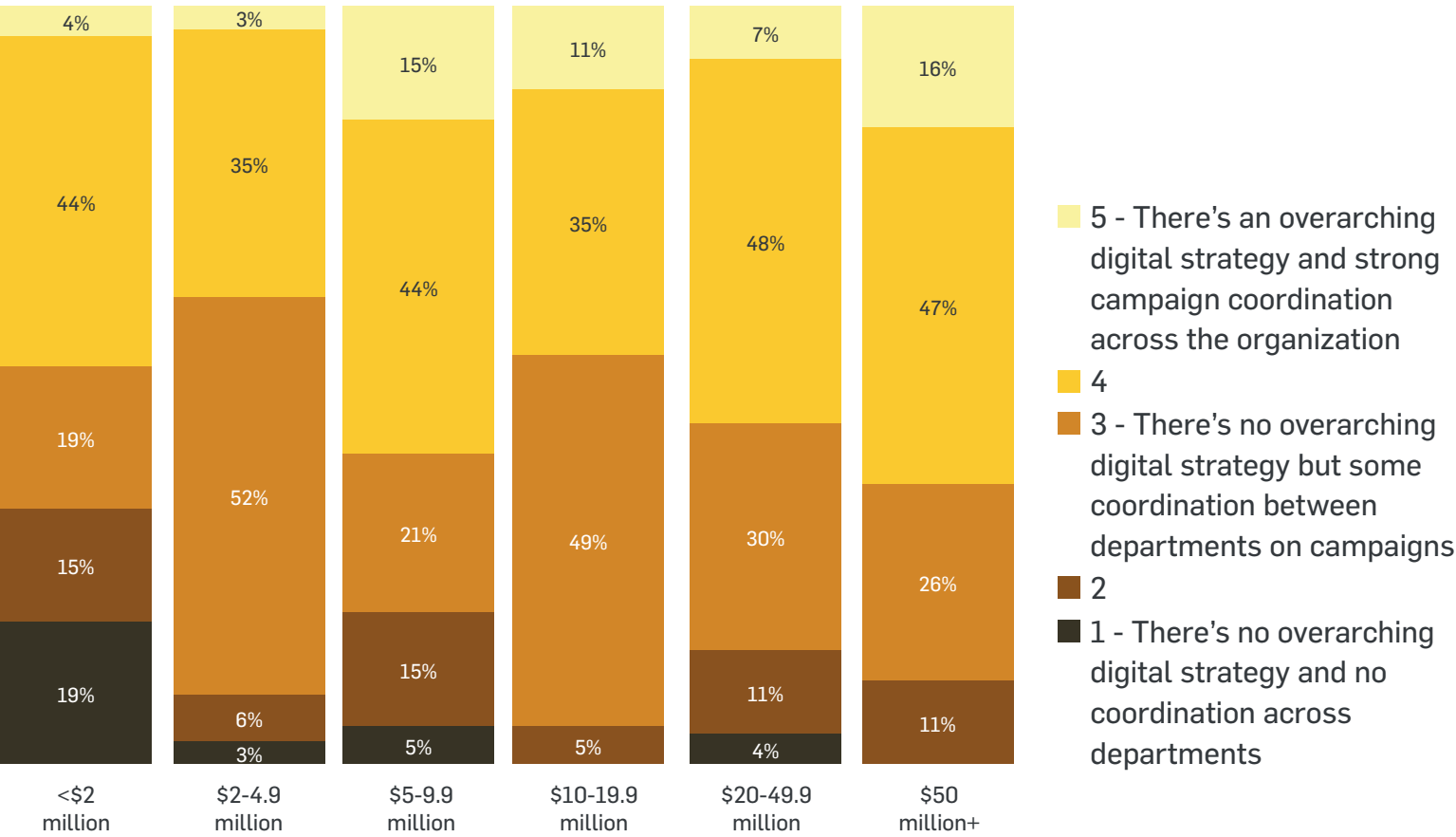


Figure 1.3

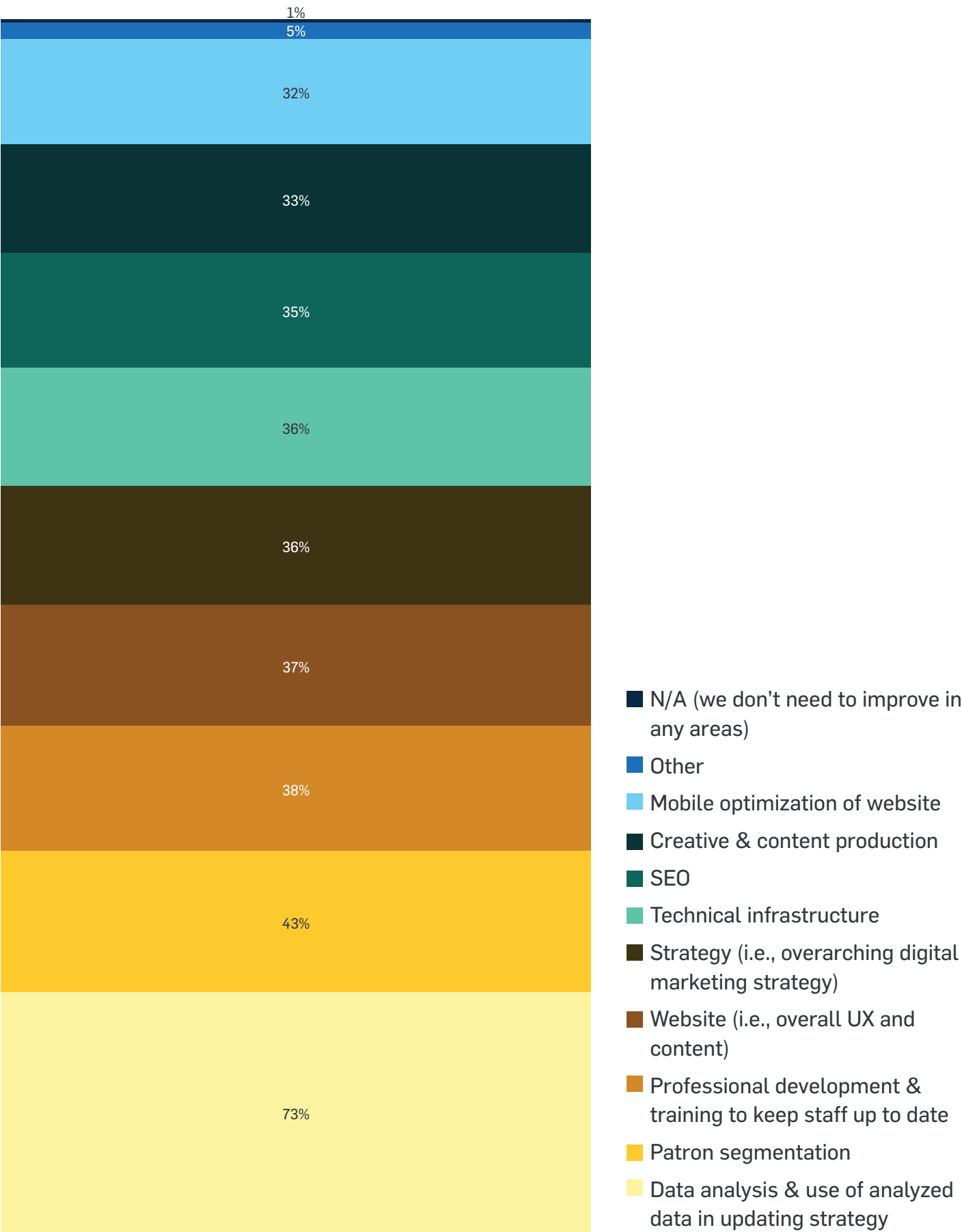
Digital Marketing Strategy Score Across Organization,
by Operating Budget



The most common area identified for improvement in digital marketing practices (indicated by 73% of organizations) was data analysis and the use of analyzed data in updating strategy. Patron segmentation, identified by 43% of organizations, was a notable second and relates both to the ability to use data and customize content for segments- two topics explored in depth in this report. Organizations could choose up to four areas on this question, granting us a wealth of insight into many more areas organizations view as needing improvement. About one third of the responding organizations placed each of the following in their top four areas for improvement: professional development, website, technical infrastructure, strategy, SEO, creative and content production, and mobile optimization.

Figure 1.4

Most Significant Areas for Improvement in Digital Marketing Practices (Choose Up to Four), All Organizations



The top area for improvement is consistent across all budget categories and organization types. A shift to prioritizing resources and time towards data and analysis is foundational to a cogent, organization-wide digital strategy, and could have far reaching impact. As you'll see, this self-identified area for growth resonates across other data in the study.

Looking at the full range of reported challenges, some interesting differences emerge between organization types. For example, 63% of Museums/Centers reported patron segmentation as an area of greatest need for improvement. This may be due to the fact that, in the absence of specific event ticketing, Museums/Centers may lack data on the scope and nuances of patron activity at their organization.

Looking at the breakdown by operating budget, there is an inverted U-shaped distribution of challenges. While we can't be sure what is causing this, it will be interesting to watch over the years to see if it remains consistent.

Figure 1.5
Most Significant Areas for Improvement in Digital Marketing Practices (Choose Up to Four), by Organization Type

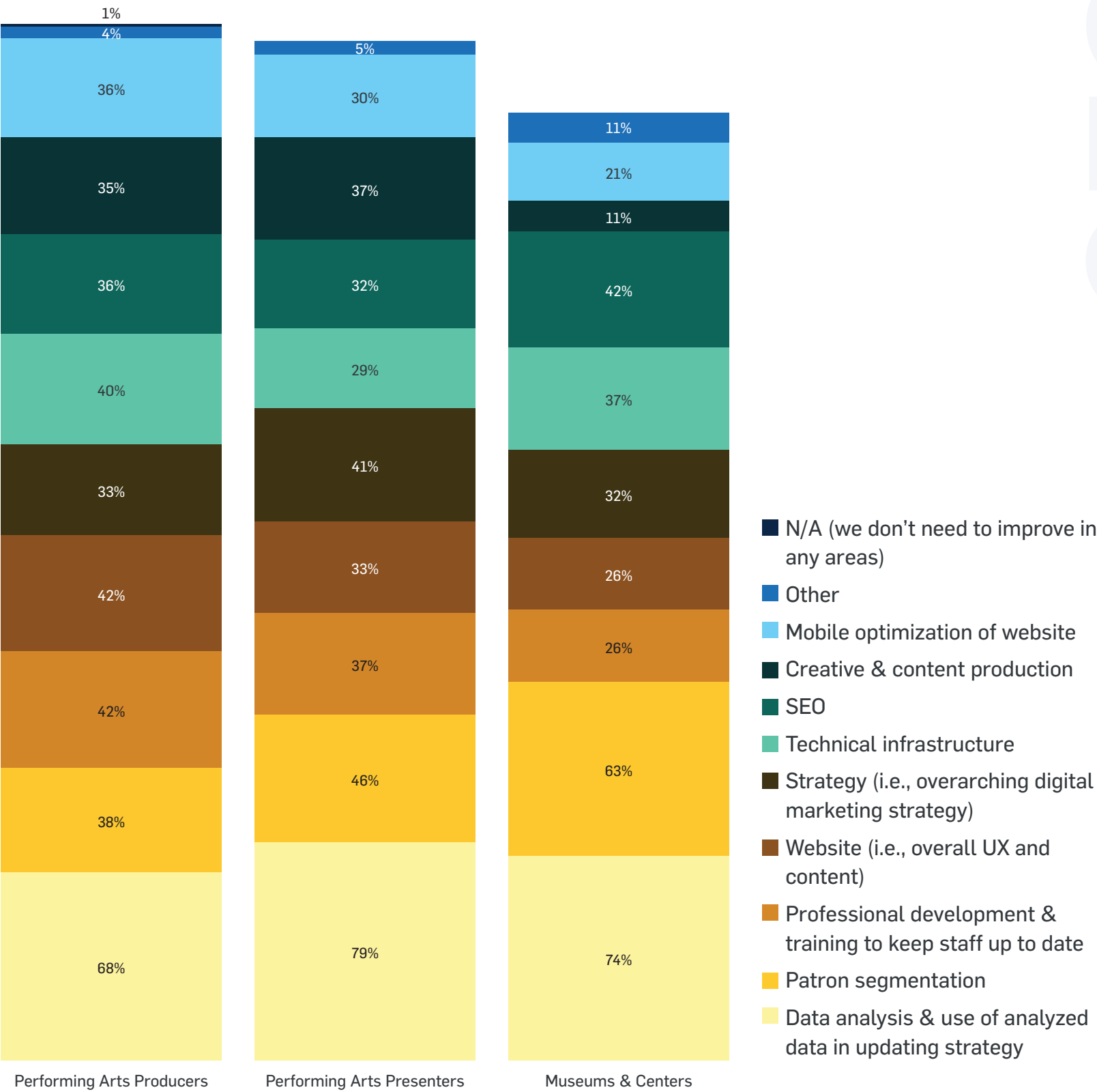
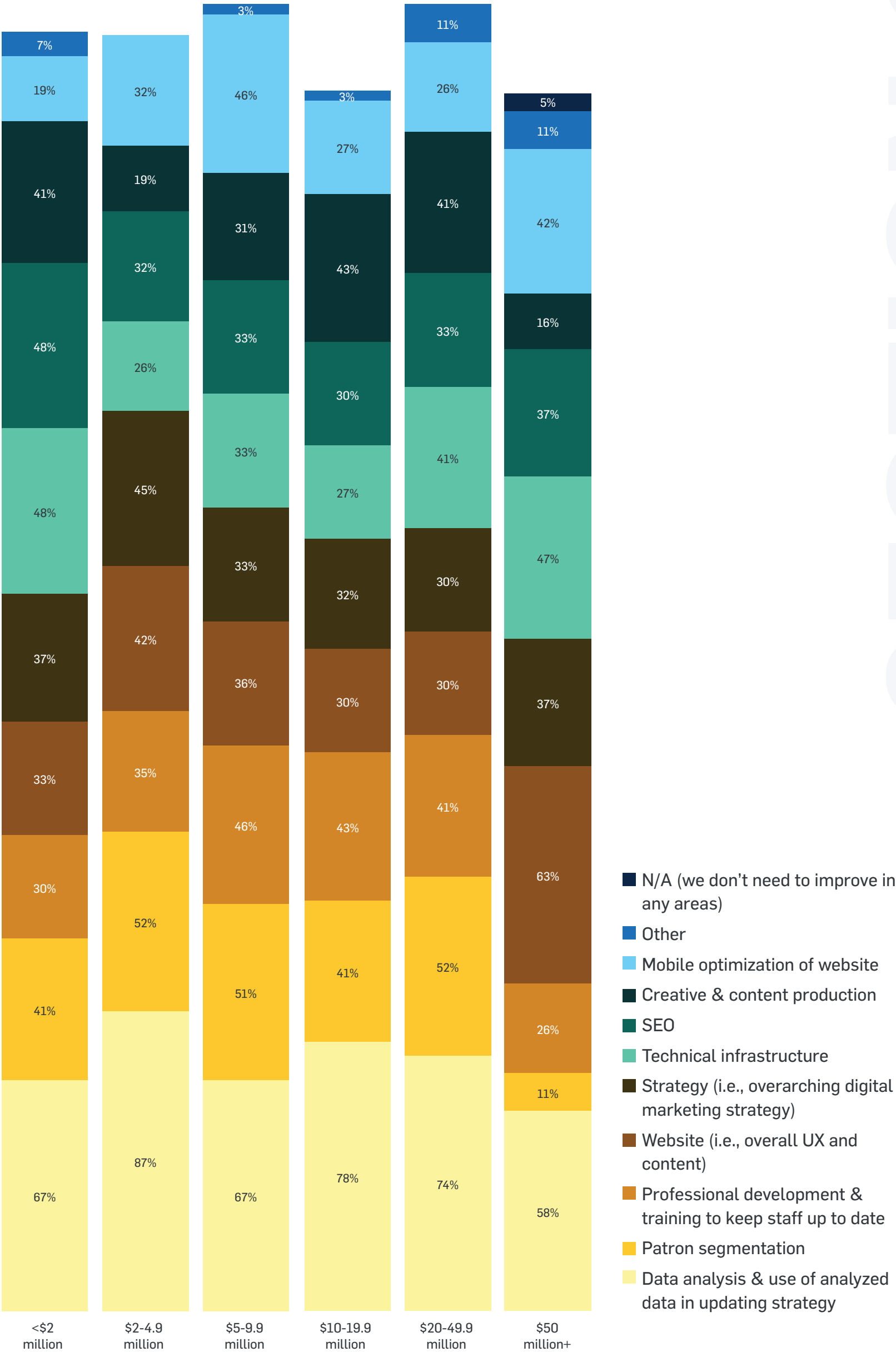


Figure 1.6

Most Significant Areas for Improvement in Digital Marketing Practices (Choose Up to Four), by Operating Budget



In This Section: Resources - Budget & Partners

We restructured the way we asked about budget and resources for this study. We began with a broader view of how marketing budgets are allocated, then we looked closely at areas of digital paid media spending. We also asked about third party partnerships to get a clear view on the scope of outside resources being tapped by organizations. Today, marketers in all industries are grappling with how to develop the right mix of internal competencies and reliance on external expertise in order to adapt to, and support the demands of, the rapidly evolving digital marketing landscape.¹⁹



Jump to the Data

- Marketing Budget Allocation >
- Third Party Digital Marketing Partners >
- Paid Digital Media Channels Used by Organizations >

Key Finding: Paid Media Allocations

Survey respondents reported that 30% of paid media was dedicated to digital and 70% was dedicated to non-digital media.

Connecting the Data

External data suggests that arts organizations are underinvesting in digital paid media compared to the broader marketing field. An eMarketer report indicates an average across industries of 38% of advertising spending was dedicated to digital methods in 2017, and it's forecasted to grow to 45% by 2020.²⁰

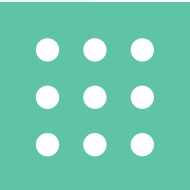


Key Finding: Digital Paid Media Channels

When it comes to digital paid media channels, responses suggest an almost universal embrace of the power of Facebook. 93% of organizations used Facebook Ads Manager, and it was the most commonly used channel across all budget sizes (87-100%). After Facebook, display advertising channels were reported most frequently: 77% of organizations used behavioral/content networks or programmatic display and 71% of organizations reported direct placements on websites, but both with great variability across budget sizes.

Connecting the Data

In our work with clients we see that direct placements are often more accessible to organizations with smaller budgets due to the lack of management involved (rather than optimizing campaigns based on performance, direct placements are more of a “set it and forget it” arrangement). But, they often lack capabilities such as behavioral targeting or tracking of purchase conversions, which can leave organizations without [data to evaluate the effectiveness of the ads](#).²¹ It will be interesting to watch allocations in future iterations of the study compared to trends in the broader marketing field- when it comes to display, some see the future belonging to programmatic, with eMarketer predicting that nearly 84% of digital display ad dollars will transact programmatically by 2019.²²



COMMON
FINDINGS

Section Detail

When looking at marketing budget allocations, what stands out is that digital paid media still lags behind non-digital paid media in aggregate and across all budget categories and organization types. The average allocation of marketing budget to digital paid media was 19% and the average allocation to non-digital paid media was 43%. As noted above, when looked at in another way, out of all paid media 30% was dedicated to digital and 70% was dedicated to non-digital.

Connecting the Data

As we learned in the [Performing Arts Ticket Buyer Media Usage Study](#), while older age cohorts of ticket buyers are more likely to read print magazines and newspapers, that doesn't mean they're not online. Amongst those survey participants over 65 years old who read print: 89% also access news online, 90% purchased performing arts tickets online in the past 12 months, and 53% are on Facebook. With the exception of those over 75, all age cohorts are more likely to access news in some digital form than read print publications. This is a compelling reason to evaluate the proportion of marketing dollars allocated to paid digital media.²³

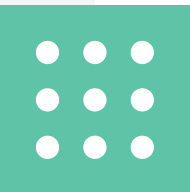


Figure 2.1a

Average Allocations as a Percentage of Total Marketing Budget, All Organizations

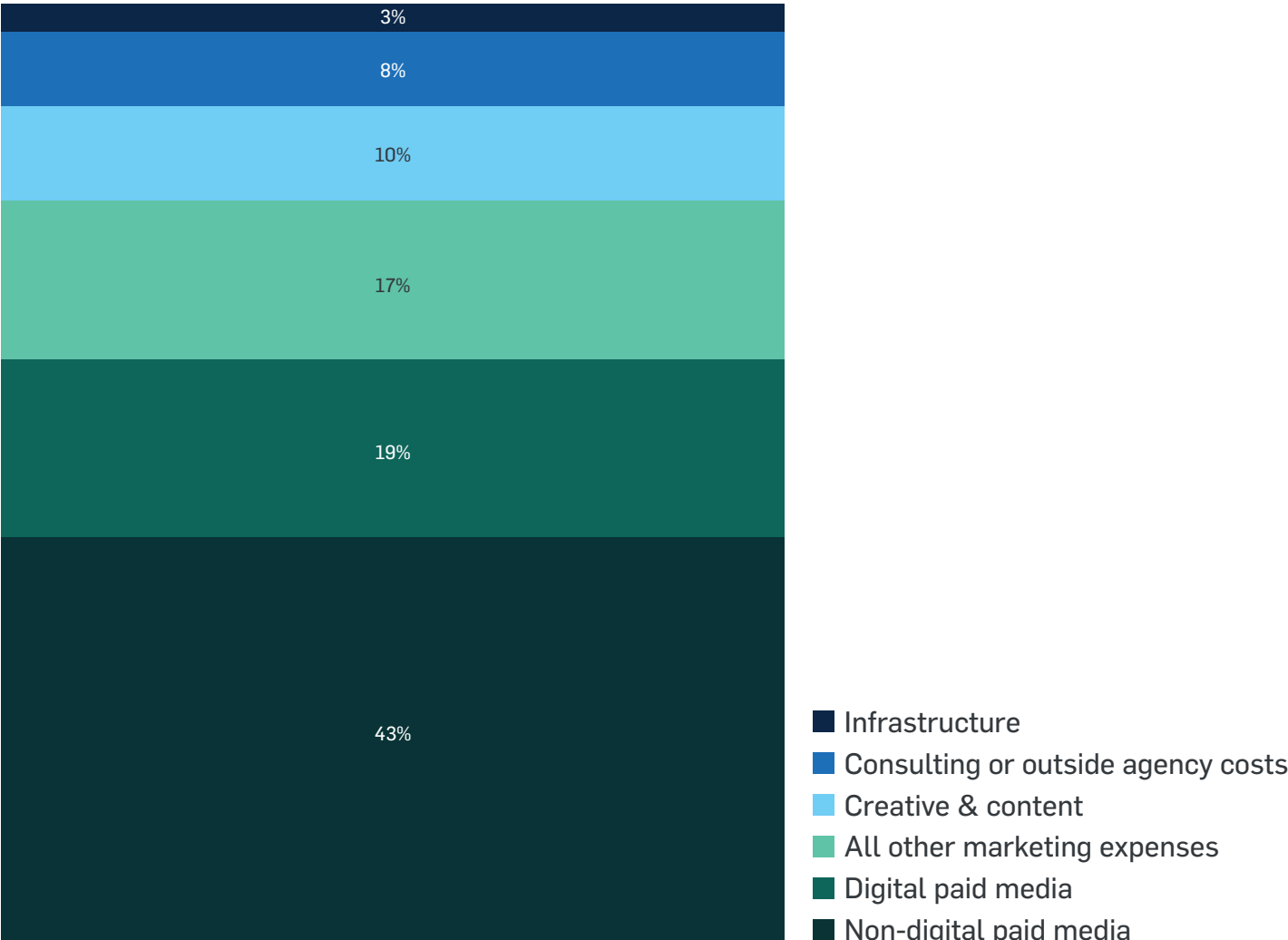
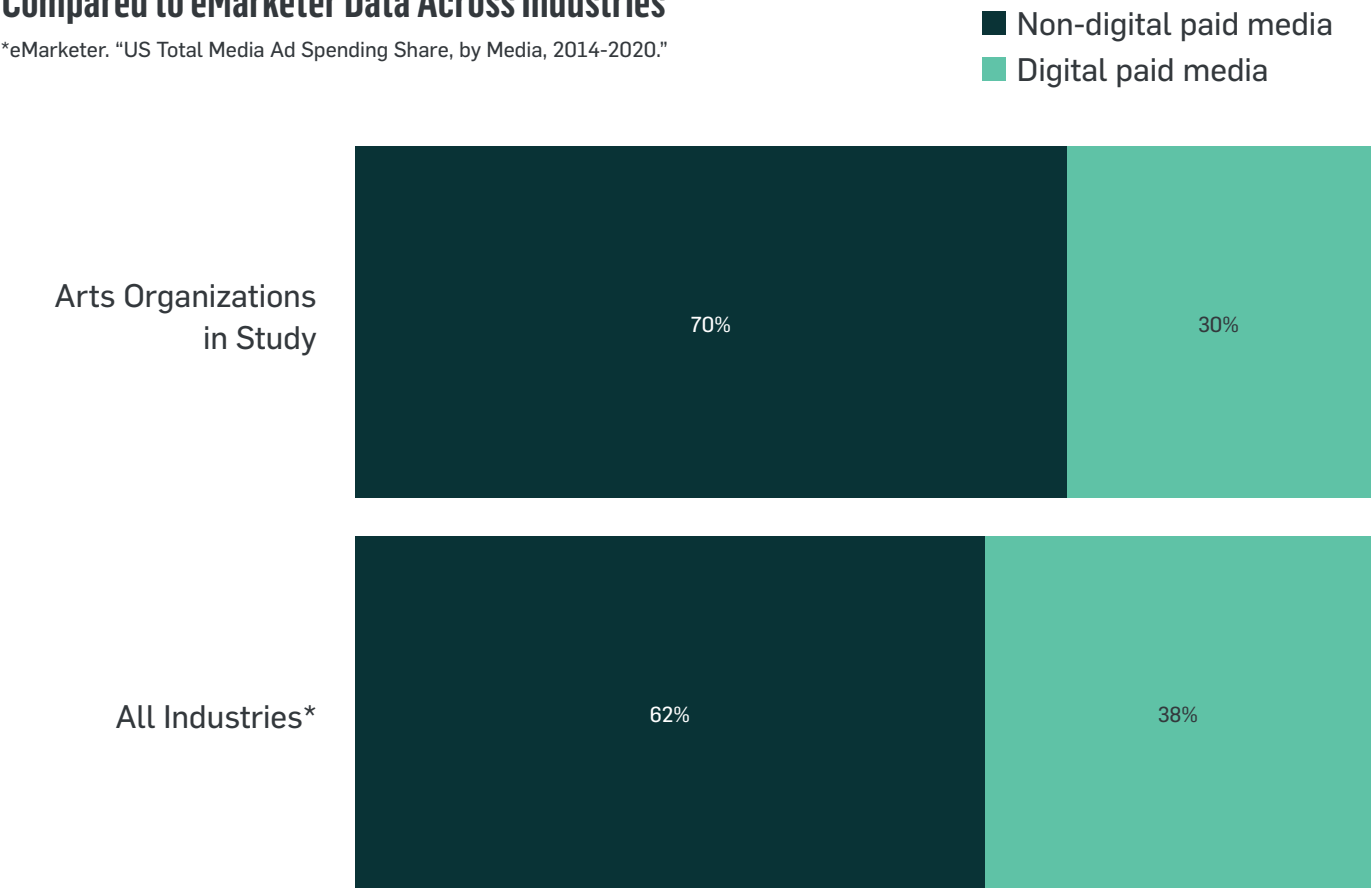


Figure 2.1b

Average Digital vs. Non-Digital Allocations,
as a Percentage of All Paid Media,
All Organizations,
Compared to eMarketer Data Across Industries*

*eMarketer. "US Total Media Ad Spending Share, by Media, 2014-2020."



Looking across other spending, there aren't discernable allocation patterns showing a relationship with operating budget size, with one exception. While not perfectly linear, you see a general negative relationship with creative and content allocation. This gains meaning when explored next to the reported full time equivalent (FTE) for content/creative staff (see Figure 7.1) where you see that as operating budget size increases organizations allocate more staff time (presumably from payroll) to creative and content. In other words, as paid staff time increases for creative and content, proportionately less money is allocated to sourcing support via their marketing budgets.

When interpreting these charts, please note that many factors could influence reported allocations for the infrastructure and creative/content categories, such as if there is a separate department in an organization that holds those resources or if resources come from payroll.

Figure 2.2

Average Spending Allocations as a Percentage of Total Marketing Budget, by Operating Budget

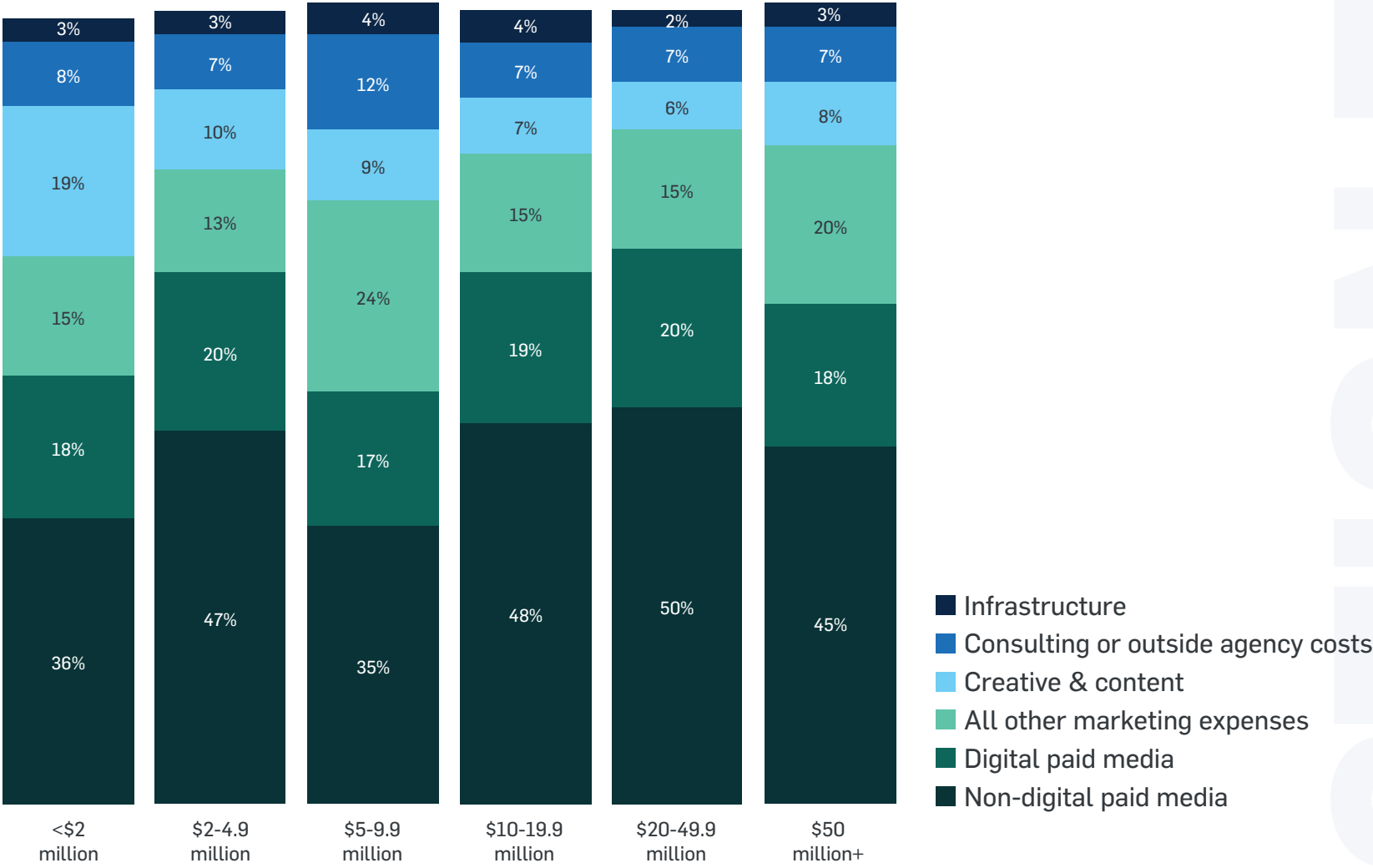
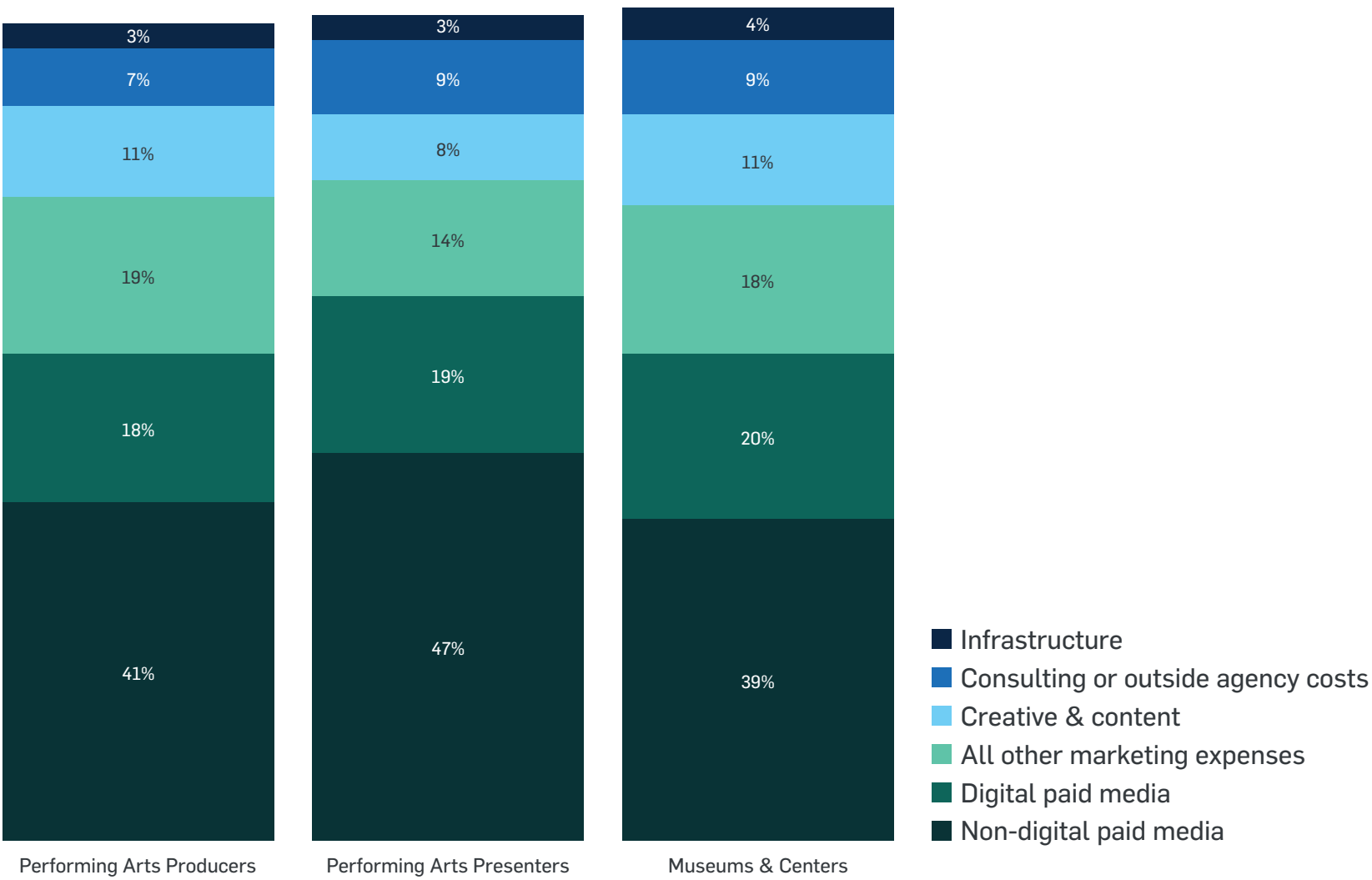


Figure 2.3

Average Spending Allocations as a Percentage of Total Marketing Budget, by Organization Type



There appears to be a relationship between the overall breadth of third party partnerships and operating budget size, though with some variations between budget categories. Correlation with larger operating budget categories is most noted with dynamic pricing, analytics, digital marketing strategy, and SEO. The implications of this are thought-provoking, as these are elements that could have a profound impact on infrastructure and strategy growth, which are needed by organizations of all sizes.

Figure 2.4

Percentage of Organizations Reporting Specified Third Party Digital Partnerships, All Organizations

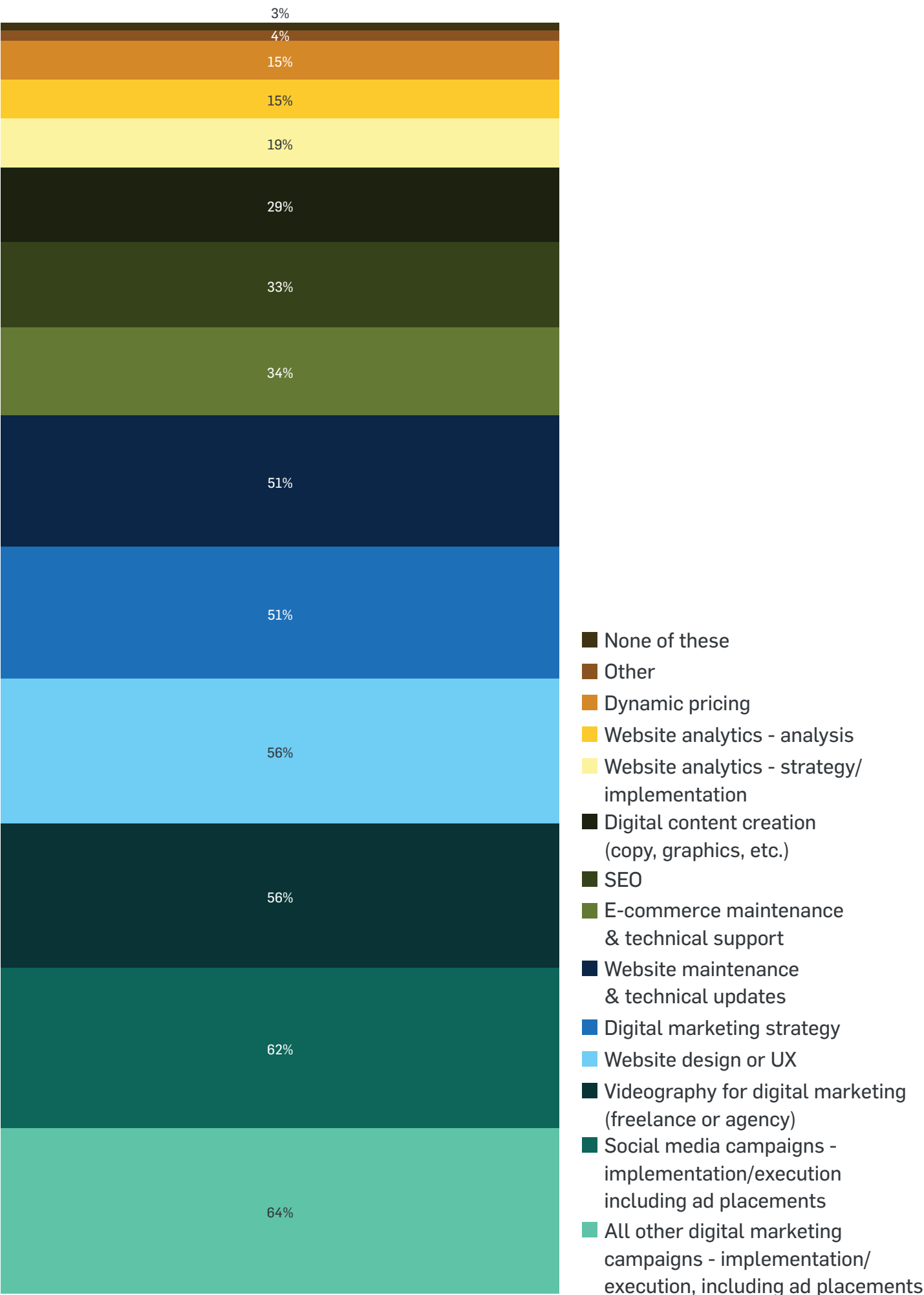
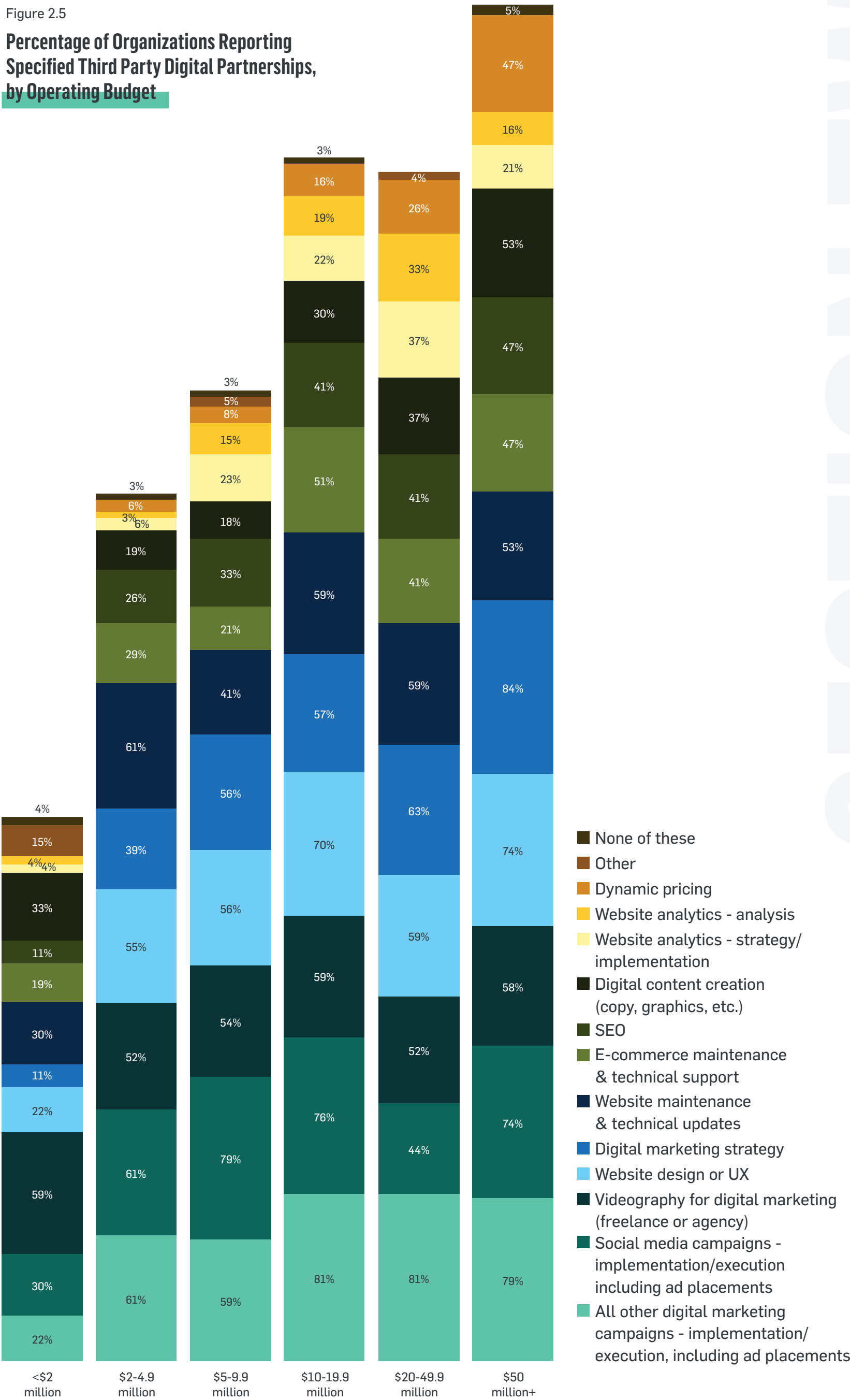


Figure 2.5

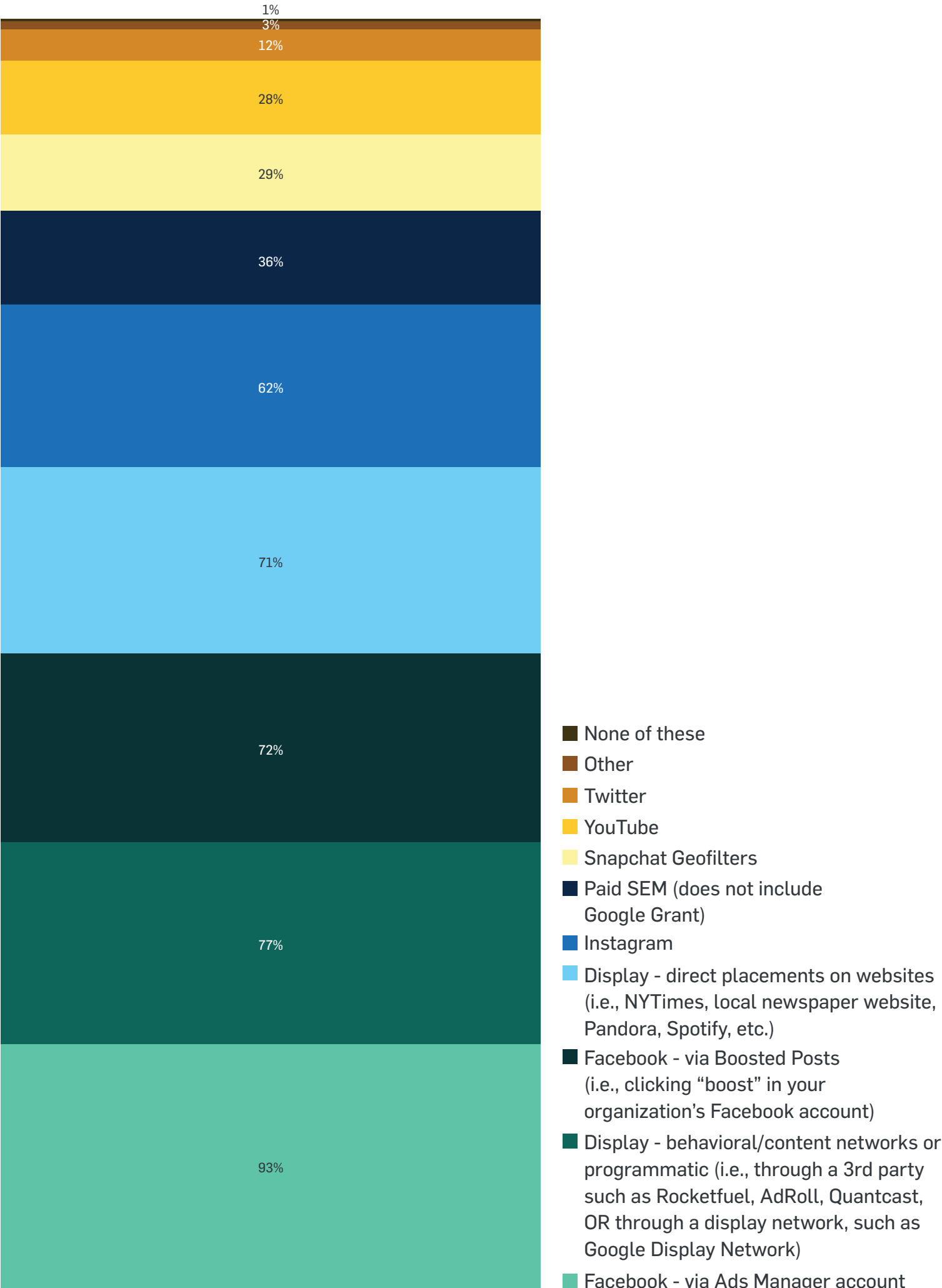
Percentage of Organizations Reporting Specified Third Party Digital Partnerships, by Operating Budget



Turning to paid digital media types used by organizations, Facebook is pervasive across organizations. An average of 93% of organizations reported use of Facebook Ads Manager and 72% reported use of Facebook Boosted Posts. After Facebook, display advertising was reported most frequently, followed by Instagram.

Figure 2.6

Percentage of Organizations Reporting Use of Specified Paid Digital Media Channels, All Organizations



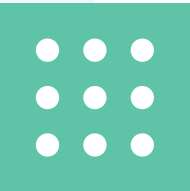
Use of digital paid media channels shows more complexity as budget size increases. Smaller organizations focused heavily on Facebook, with some additional channels incorporated, while larger organizations showed a greater breadth of channel use. The same five top channels dominated across all budget categories (though not in the same order), with the exception of the \$50 million+ budget category where paid SEM displaced Facebook Boosted Posts.²⁴

The two Facebook paid media categories were fairly consistent across budget categories, likely due to the low cost hurdle for entry and the flexibility of the platform to scale according to the organization. Facebook Ads Manager was the most frequently reported channel across all budget sizes (by over 85% of organizations in each budget category). Given the high reported use of Ads Manager, use of Facebook Boosted Posts was surprisingly high across all budget categories (ranges in a non-linear manner between 58-85%). It would appear organizations broadly used Boosted Posts to augment advertising being managed in Ads Manager, but it's unclear how those decisions were made.

Beyond Facebook, we see high reported use across display advertising channels and Instagram. Looking at the former, behavioral/content networks or programmatic display correlated with, and varied greatly across, operating budget size (33-95%). Direct placements on websites followed the same general pattern across budget sizes (ranging from 52-93%).²⁵

Connecting the Data

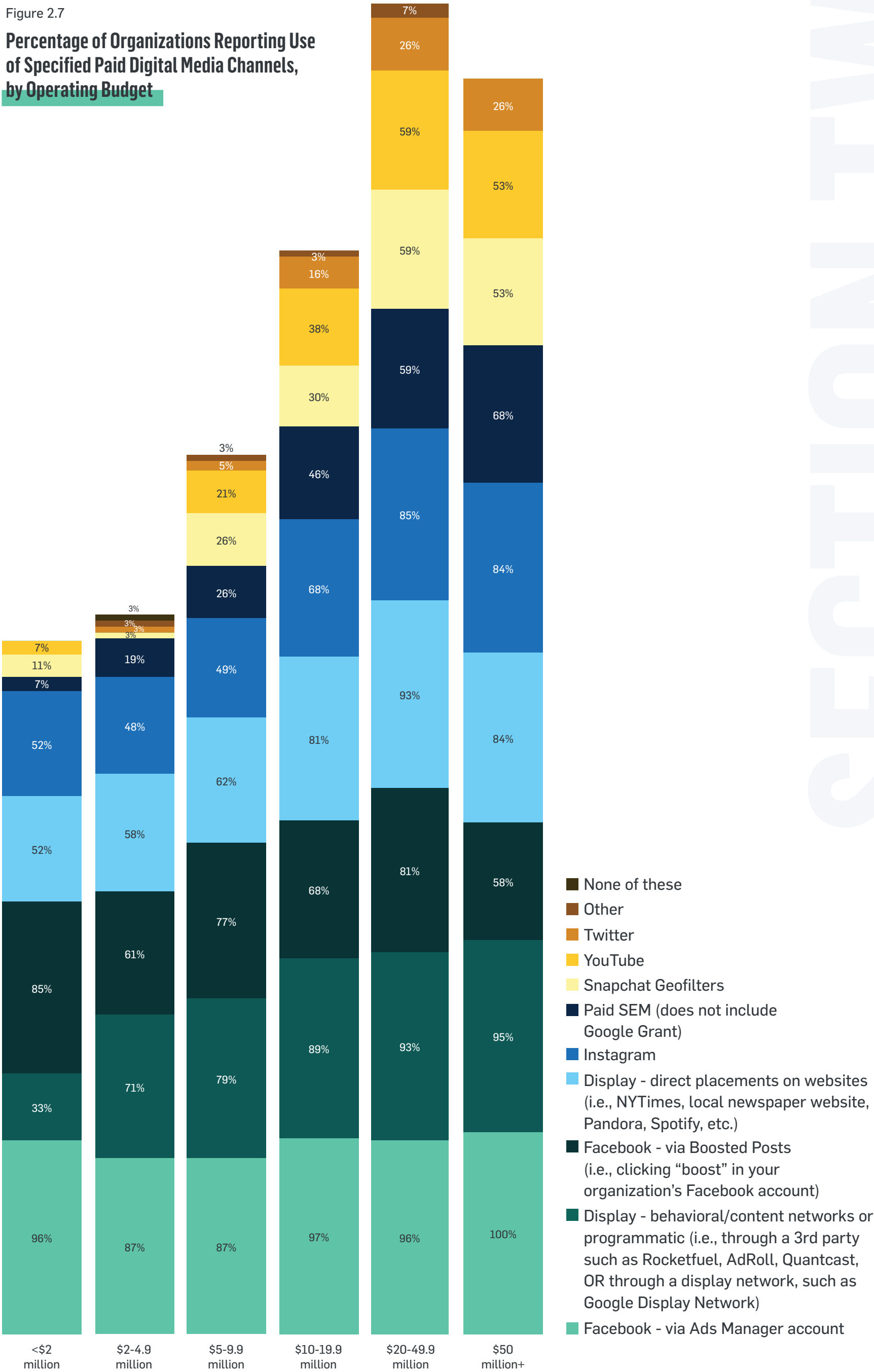
The data from the [Performing Arts Ticket Buyer Media Usage Study](#) demonstrated that people are consuming news all over the web, and not necessarily on your local newspaper's website, or even the national paper's website.²⁶ You can reach new audiences wherever they are on the web via behavioral or interest-based targeting via display networks. Furthermore, you can reach bottom of funnel audiences via remarketing if you set up your digital infrastructure to track users based on their actions on your website. With these capabilities available via behavioral/content networks or programmatic display, the reported use of direct placements is surprisingly high. In terms of guaranteeing return on your investment, it's much more fruitful to target qualified leads instead of relying on chance that the appropriate audience will visit a specific website.



CONNECTIONS

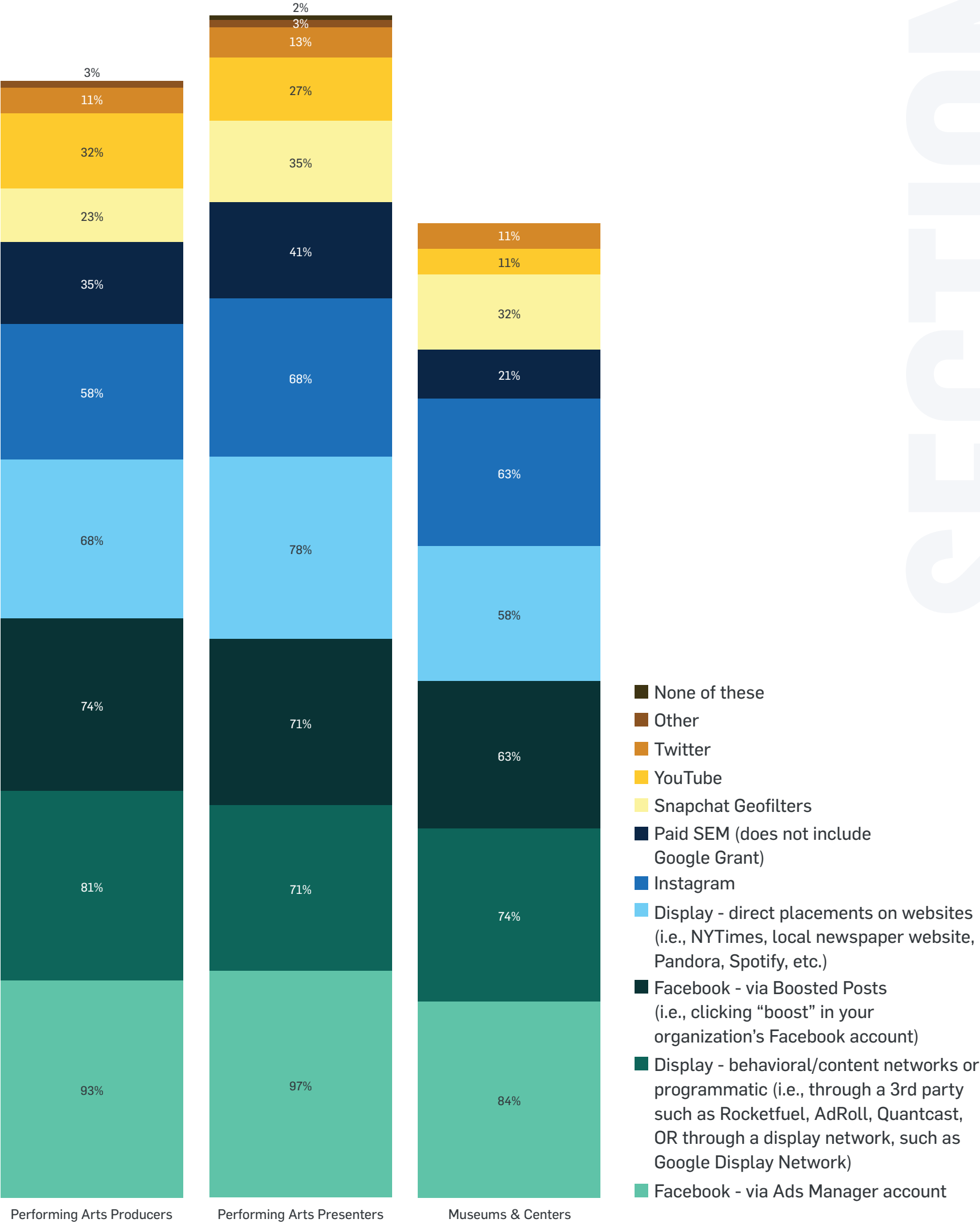
Figure 2.7

Percentage of Organizations Reporting Use of Specified Paid Digital Media Channels, by Operating Budget



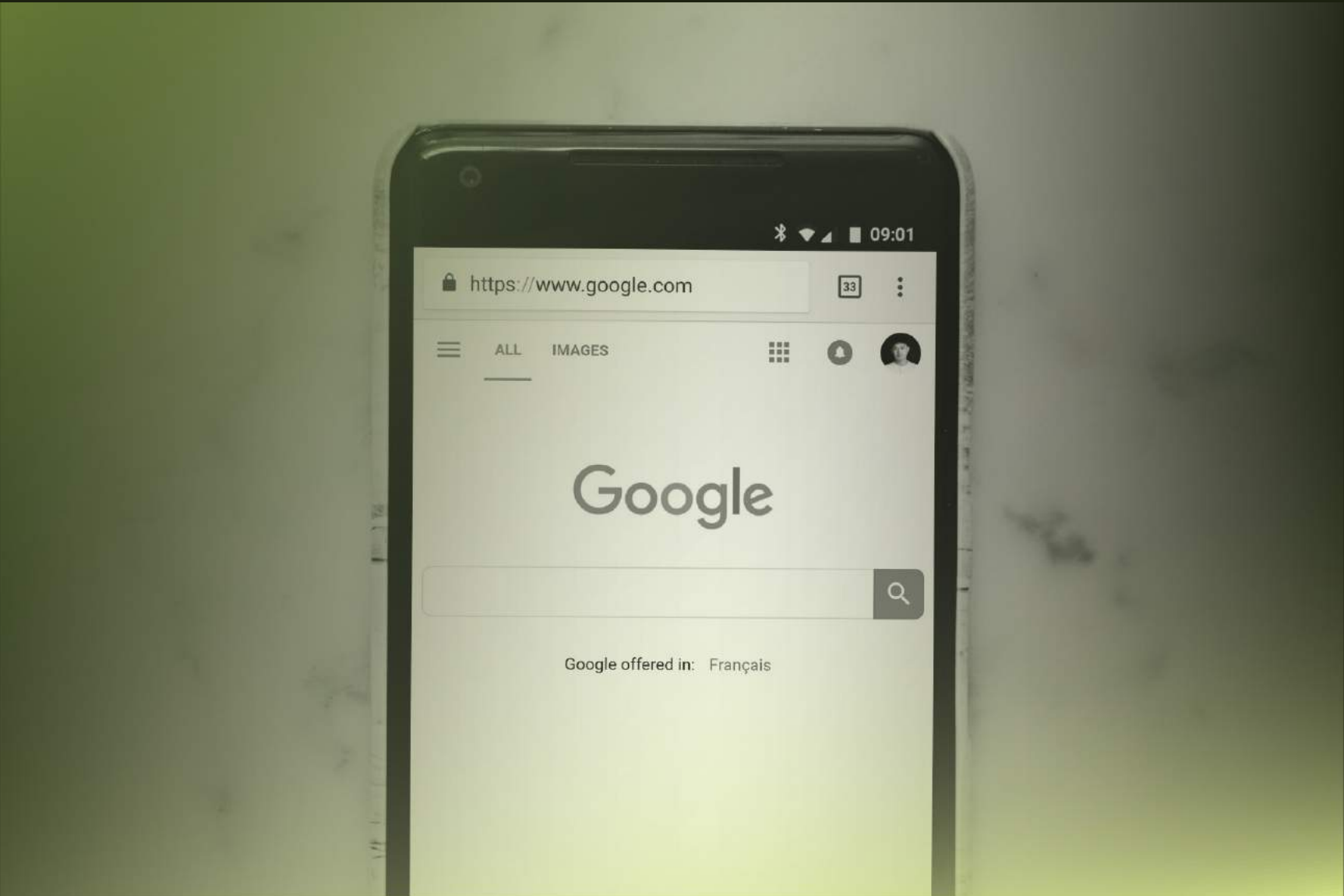
There was lower reported use for almost all digital paid media channels by Museums/Centers compared to the Performing Arts Presenters and Producers, including Facebook Ads Manager, Facebook Boosted Posts, paid SEM, and direct placements on websites.

Figure 2.8
Percentage of Organizations Reporting Use of Specified Paid Digital Media Channels, by Organization Type



In This Section: Resources - Focus on Search

Search can be thought of as a resource in and of itself, as it’s the product of patrons seeking you out to satisfy a need, gain more information, or complete a transaction- essentially delivering themselves as qualified leads to your doorstep. In that light, it’s crucial for organizations to turn on the spotlights to guide patrons in with the tools at their disposal: **Google Grant SEM, paid SEM, and SEO.**²⁷ Prioritizing SEO and SEM ensures that users can discover you, whether they know how to search for you by name (branded searches) or if they’re looking more broadly for an event or topic you can deliver (non-branded searches).²⁸



Jump to the Data

- Google Grant Participation >
- Frequency of SEO >

Key Finding: Search Engine Marketing & Optimization

Reports of having and using a Google Grant correlate with budget size, which means that those who could benefit most from free media dollars are using them least. Rounding out the search picture: only 36% of organizations reported allocating paid digital media to paid SEM and, in aggregate, 60% of organizations attend to SEO only once per year or less frequently, or do not invest time or resources into SEO at all.

Connecting the Data

Long serving as the critical foundation for search efforts amongst organizations in the field, the Google Grant program²⁹ has undergone many changes in the last year that require that not-for-profits everywhere recontextualize the program as part of a broader search strategy, including paid SEM and SEO, and resource accordingly.³⁰ With that in mind, harnessing the free Grant dollars allows organizations to stretch their real media dollars further to maximize the impact of paid SEM.



SEARCH
NOTES

Section Detail

First, here’s a look at the status of Google Grant use across the field. Having and using a Google Grant is correlated with budget size, and many organizations are leaving free media dollars on the table. Even when we remove those who are ineligible for the Grant, only 56% and 66% of organizations in the <\$2 million and \$2-4.9 million categories, respectively, are using their Grant. This reported behavior amongst the smallest two budget categories in particular may be due to a knowledge and resource gap in acquiring and managing a Google Grant account.

Connecting the Data

Given the changes to the Google Grant program that have significantly impacted the level of traffic being driven by Grant accounts, organizations should evaluate where the Grant is providing value (for example, for branded keywords) and consider supplementing with paid SEM to capture important search activity (such as non-branded, top of funnel keywords). [As noted in the previous section](#), only 36% of organizations are using paid SEM in this way, and it ranges widely from 7-68% corresponding with operating budget size. To learn more about the changes occurring with the Google Grant program, listen to our [CI to Eye podcast episode on that topic](#).³¹



Figure 3.1
**Google Grant Usage,
All Organizations**

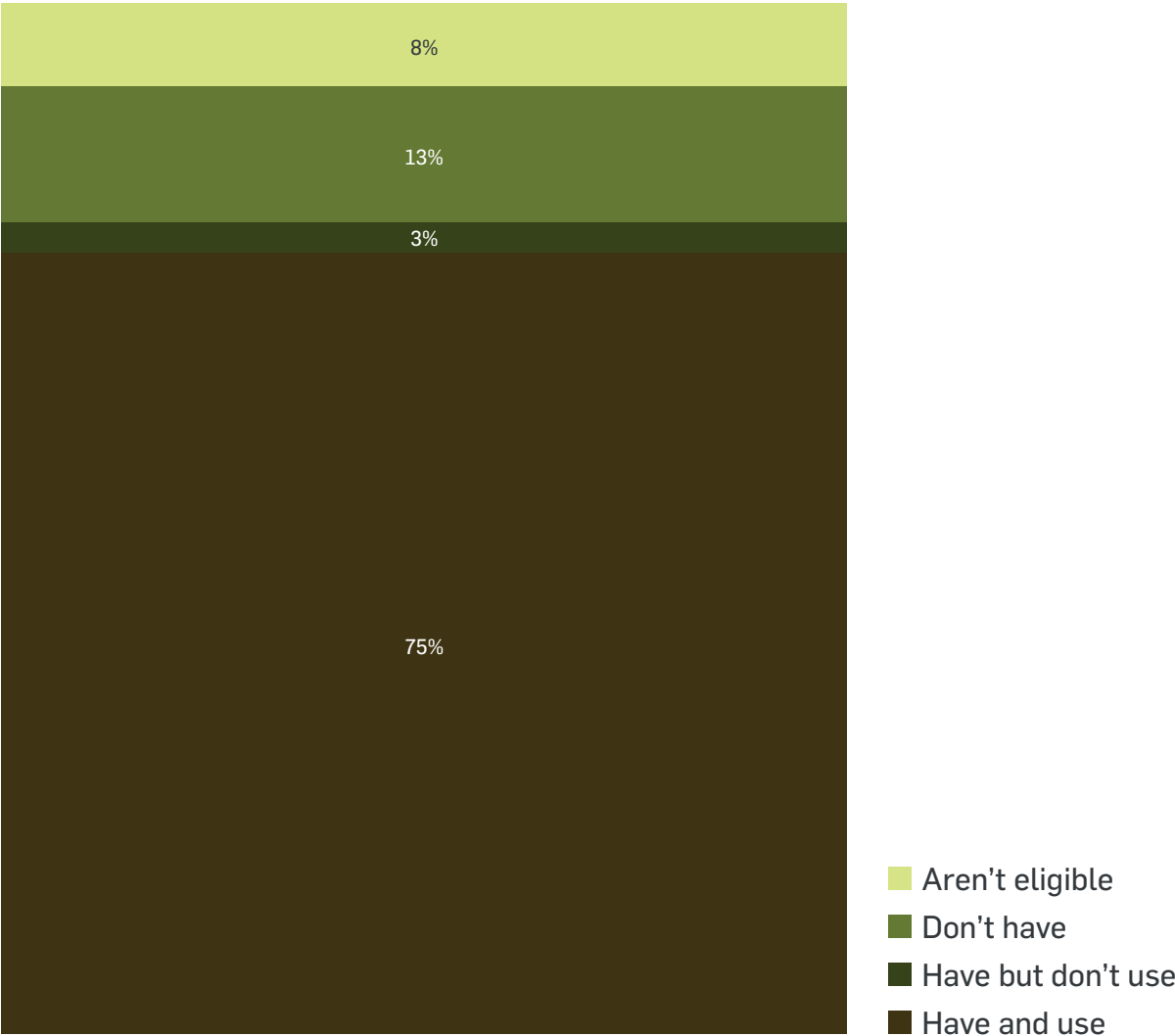
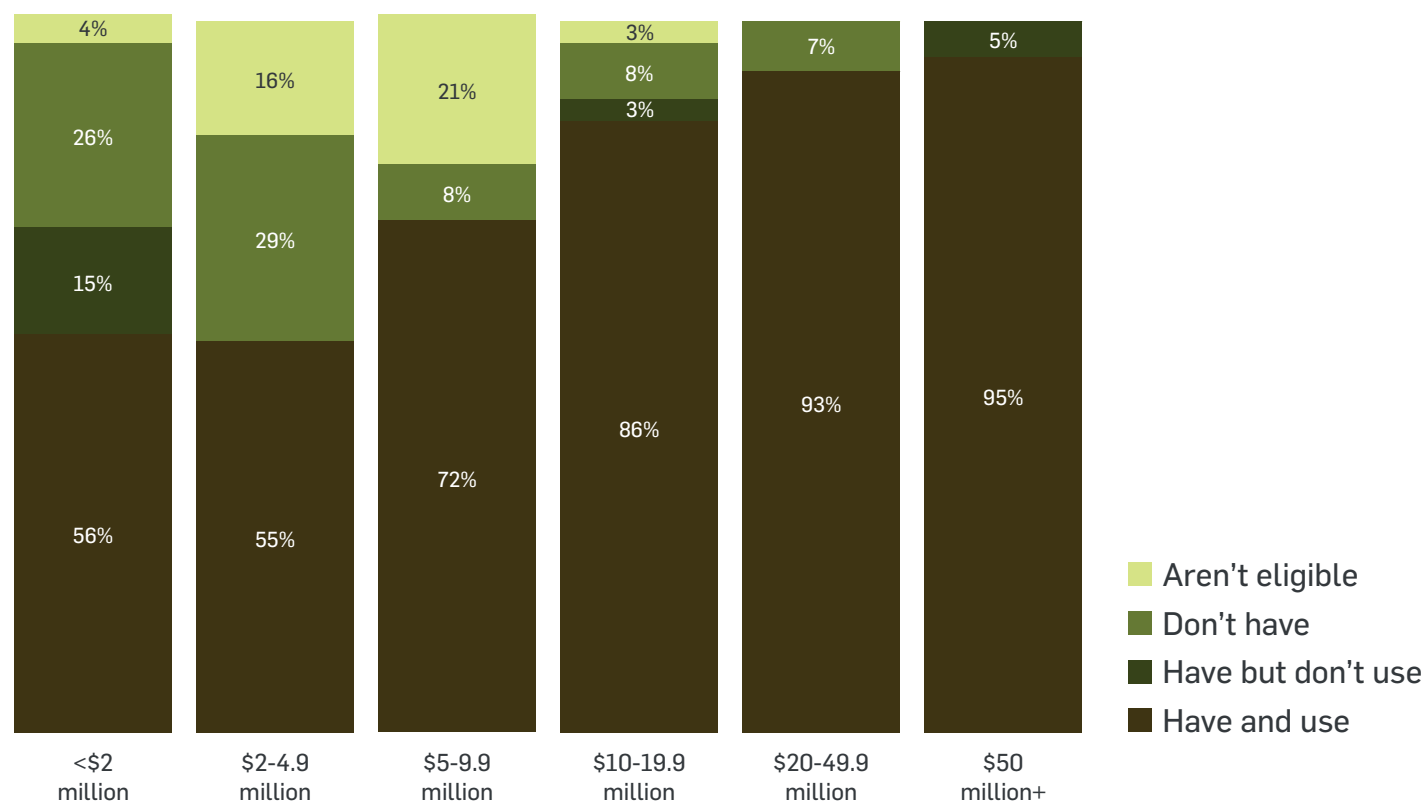


Figure 3.2
Google Grant Usage,
by Operating Budget



Complementing Grant and paid SEM is SEO, which allows you to net organic search activity for your organization. Search Engine Journal reports that, on average, 51% of site traffic comes from organic search compared to 10% from paid search.³² SEO is a dynamic tool- if you're not actively managing your SEO, organic search traffic will decline. This, in turn, causes a direct decline in conversions and revenue from organic search (and if your website's like those in the Search Engine Journal study, that's the majority of your site traffic). At present, SEO isn't a priority across many organizations in the field. In fact, an average of 22% of organizations aren't investing any time or resources into SEO. An additional 38% of organizations reported they only dedicate time and resources to SEO annually or less frequently.

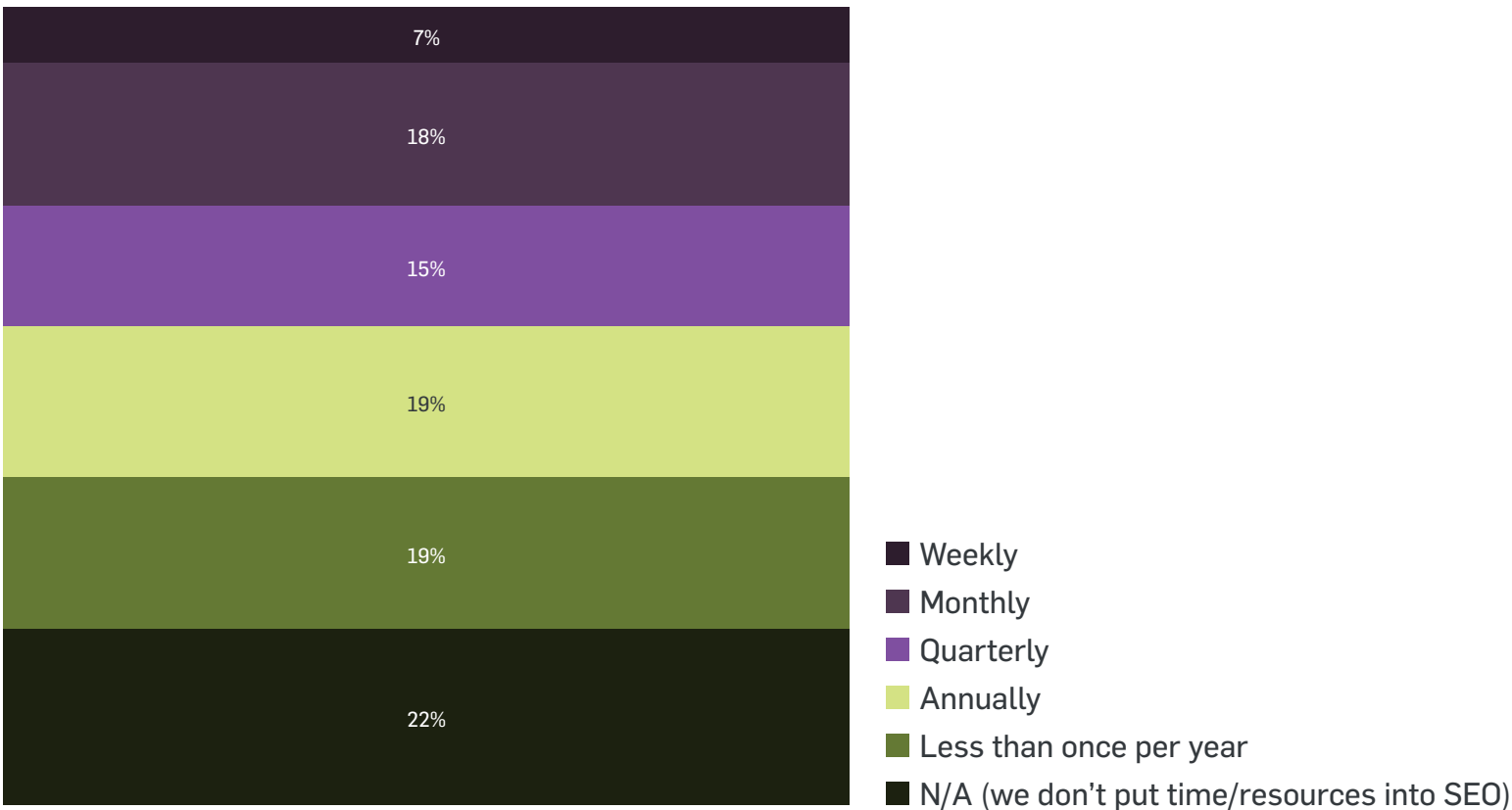
CI Insight

While there is not a one-size-fits-all answer to the appropriate amount of resources to dedicate to SEO, all organizations must ensure the proper configuration of SEO tags on the website and maintain a long-term strategy for website content creation and backlink cultivation. Organizations must also conduct ongoing, regular review of their Google Search Console to evaluate and optimize performance, and remedy errors.



Figure 3.3

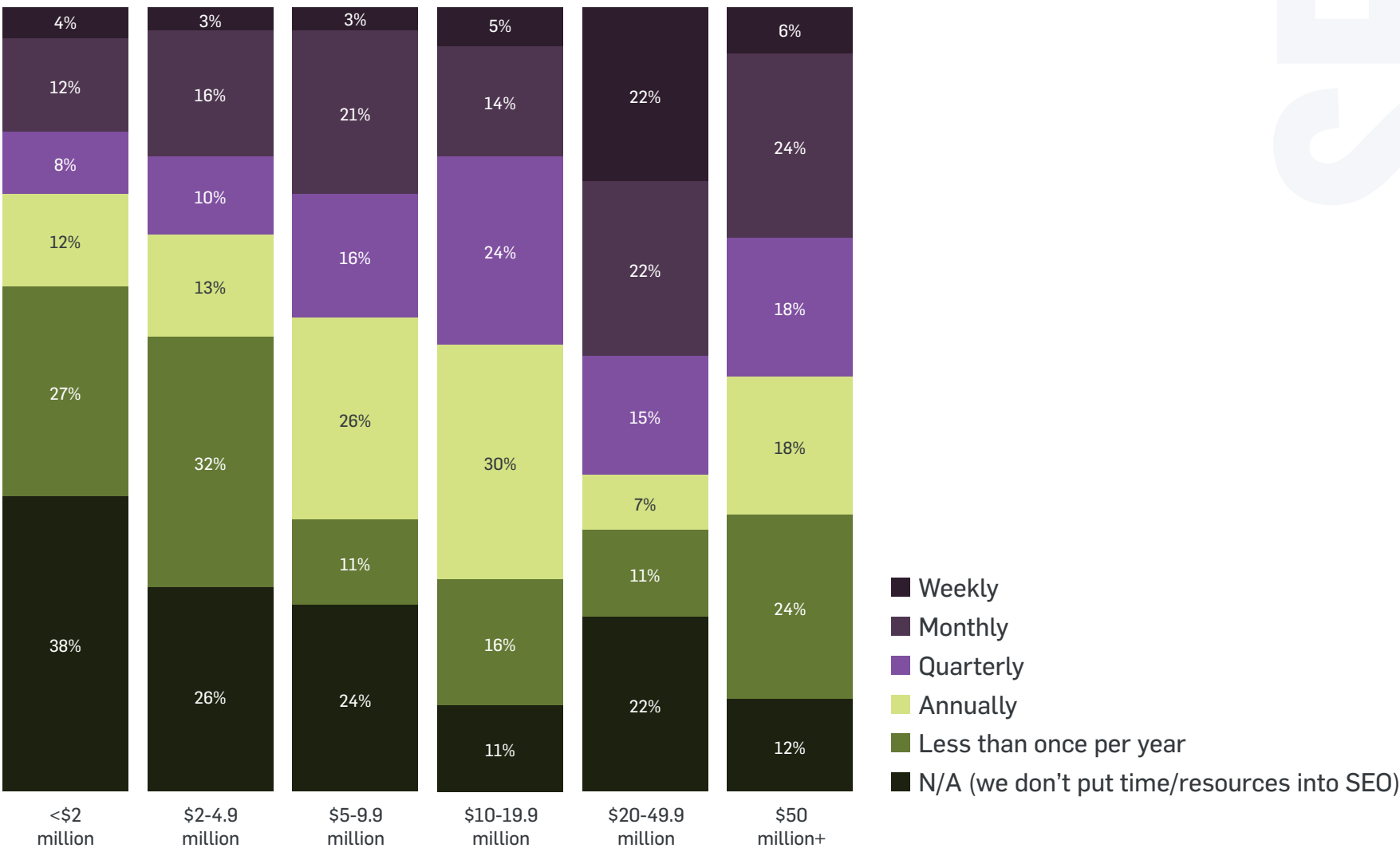
Frequency of Dedicating Time/Resources to SEO,
All Organizations



While there's not a complete correlation with operating budget size, those in the \$5 million+ categories do dedicate time and resources to SEO significantly more than those in lower categories, suggesting that it's a matter of staff bandwidth and resources.

Figure 3.4

Frequency of Dedicating Time/Resources to SEO,
by Operating Budget



In This Section: Website - Patron Path

Your website is the epicenter of your digital marketing strategy, and your patrons’ path to purchase is complex, crosses multiple devices, and relies on mobile as a crucial step. The Performing Arts Ticket Buyer Study provided data that supports the central role your website plays in all you do, and that mobile pathways are relevant to arts ticket buyers. 79% of all respondents in that study indicated that they’re most likely to purchase tickets online and 40% of those respondents who accessed a study partner’s website in the preceding 12 months did so on a smartphone at least once.³³ This year’s Benchmark Study adds to our understanding by providing data on patron site usage from arts organizations themselves.



Jump to the Data

- Website Visitor Session Metrics >
- Mobile Website Visitor Metrics >
- Mobile Optimization Efforts >
- Online Ticketing/Admission Revenue Metrics >
- E-Commerce Solutions Used by Organizations >

Key Finding: Website Traffic Metrics

The reported number of overall website visitor sessions correlates with operating budget size but, strikingly, the percentage of mobile visitors does not. In fact, the average percentage of website visitors that arrived via mobile was 43% and the averages for each operating budget size only varied between 41% and 44%. Furthermore, mobile visitation was remarkably consistent across all volumes of website visitors.

CI Insight

The very clear takeaway is that mobile is relevant to every organization, no matter the operating budget or volume of website traffic. Failing to prioritize your mobile experience is akin to keeping half of the doors into your facility closed and locked.

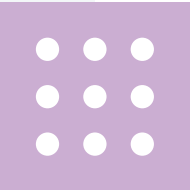


Key Finding: Mobile Optimization Practices

While 78% of organizations indicated that they've adopted a responsive site design, ongoing mobile optimization efforts are sparse. This finding is particularly noteworthy in light of the universal relevance of mobile to all arts and cultural organizations.

Connecting the Data

Given the study data (see Figure 4.2) showing that the mobile website experience forms much of the backbone of the online patron experience, prioritization of staffing and resources for mobile optimization is at a critical juncture. Future iterations of this study will shed light on the pace of mobile usage growth amongst patrons on industry websites, but the trajectory is clear: mobile excellence needs to be synonymous with website excellence.³⁴



RESEARCH
FINDINGS
CONCLUSIONS

Section Detail

As expected, the reported number of overall website visitor sessions correlates with operating budget size. But, as noted in the key finding for this section, the percentage of mobile visitors does not do the same (see Figure 4.2).

Figure 4.1

Average Total Number of Website Visitor Sessions, by Operating Budget

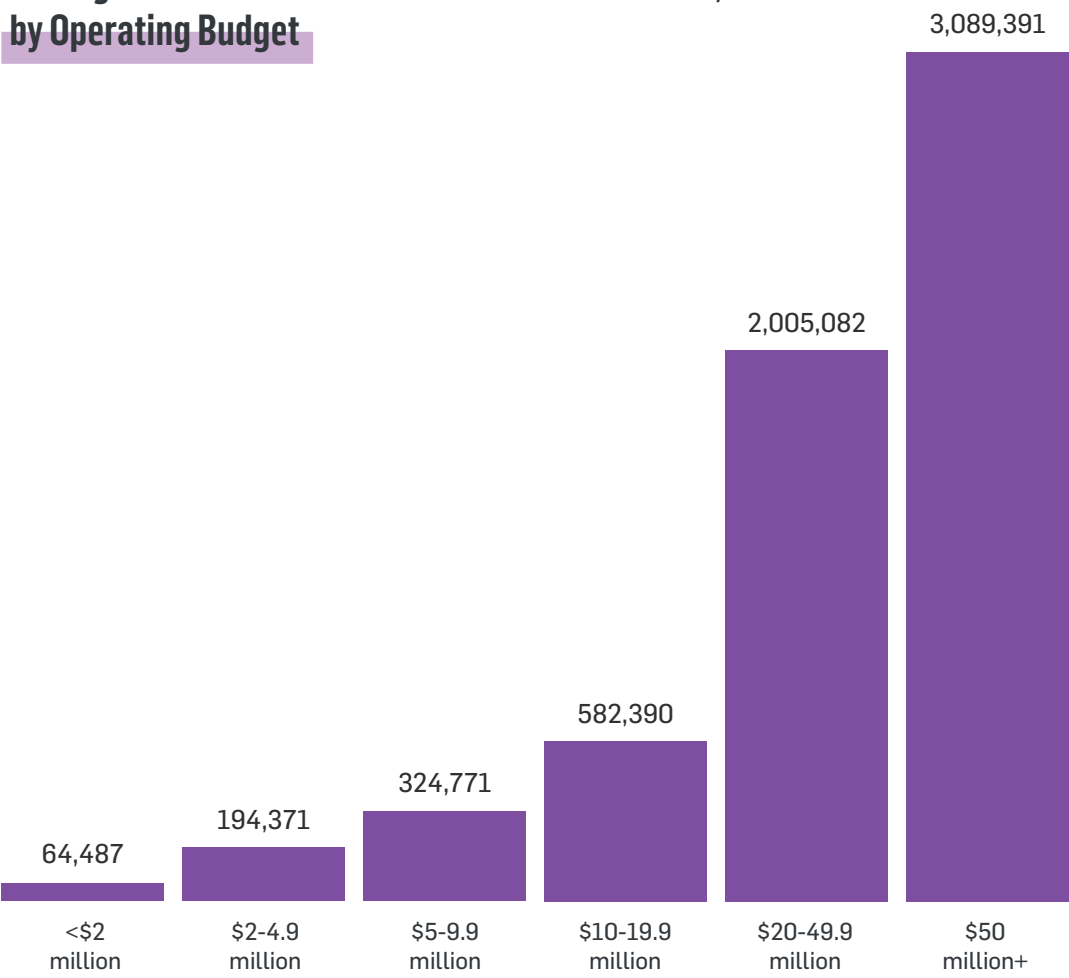
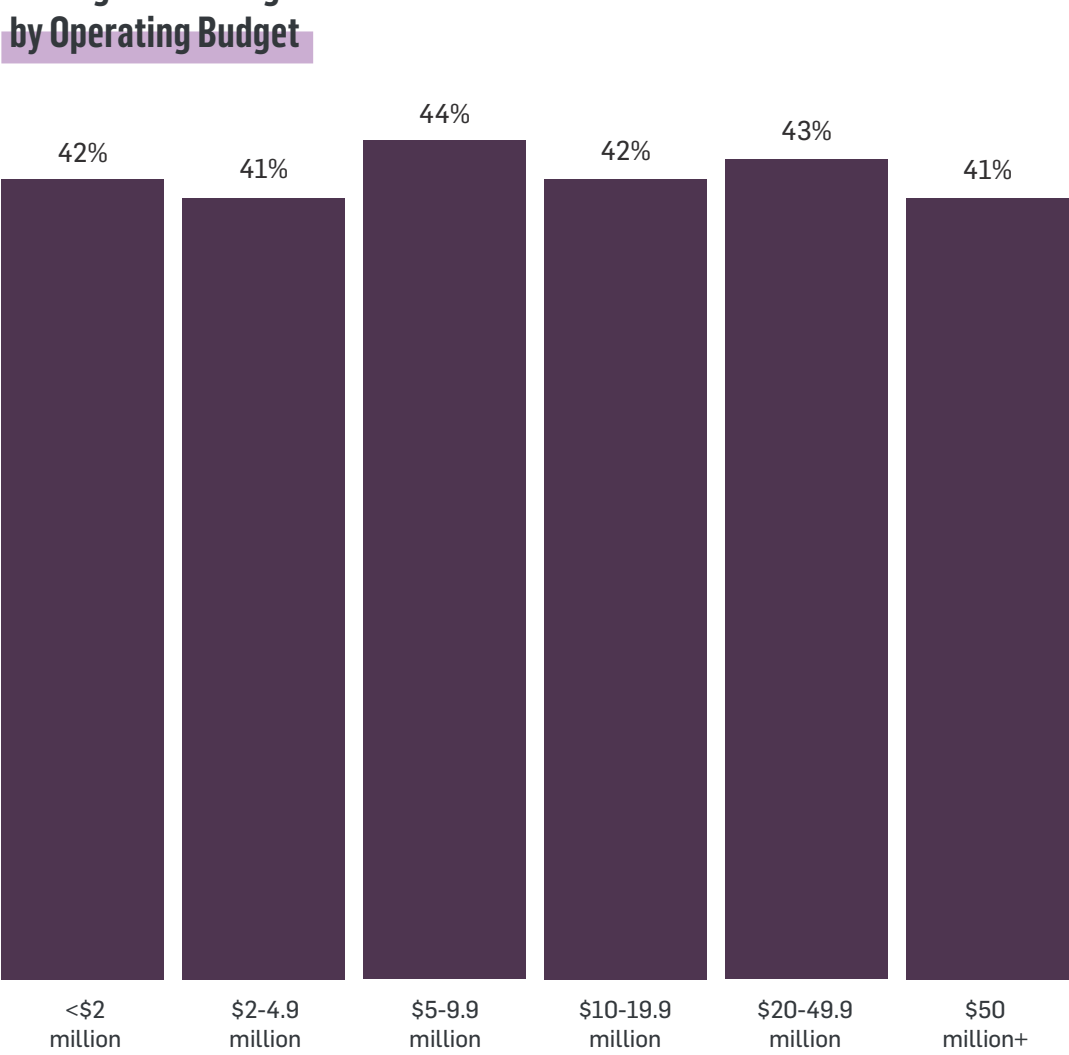


Figure 4.2

Average Percentage of Total Website Visitors That Arrived via Mobile Device, by Operating Budget



Adding to this understanding of mobile, a look at mobile visitation percentage by total website visitor session categories confirms that it's remarkably consistent. More website visitors doesn't mean a greater share will come in via mobile. In sum, no organization should say mobile isn't a priority.

Figure 4.3
Average Percentage of Total Website Visitors That Arrived via Mobile Device, by Total Website Visitor Sessions



Knowing that mobile visitation rates are substantial across all budget sizes and volumes of website visitors, it's critical that all organizations embrace mobile optimization as a priority. While it's good to see that 78% of organizations report that they have a responsive site design (though there's clearly room for improvement), it's notable that other mobile optimization practices are not widespread.

Connecting the Data

The importance of mobile optimization cuts directly to the bottom line for organizations. We saw in the [Performing Arts Ticket Buyer Media Usage Study](#) that 95% of respondents had purchased tickets online in the past 12 months and 37% of those had done so on a smartphone.³⁵ Google has taken steps towards a mobile-first indexing algorithm, meaning it will rank and index your site based on your mobile experience rather than your desktop experience. If your mobile experience suffers from slow site speed, lack of responsiveness, or a host of other factors, you won't rank as highly and audiences won't find you as easily. A first step you can take is to test how your mobile speed rates: <https://testmysite.thinkwithgoogle.com/>.³⁶

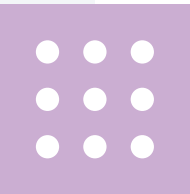
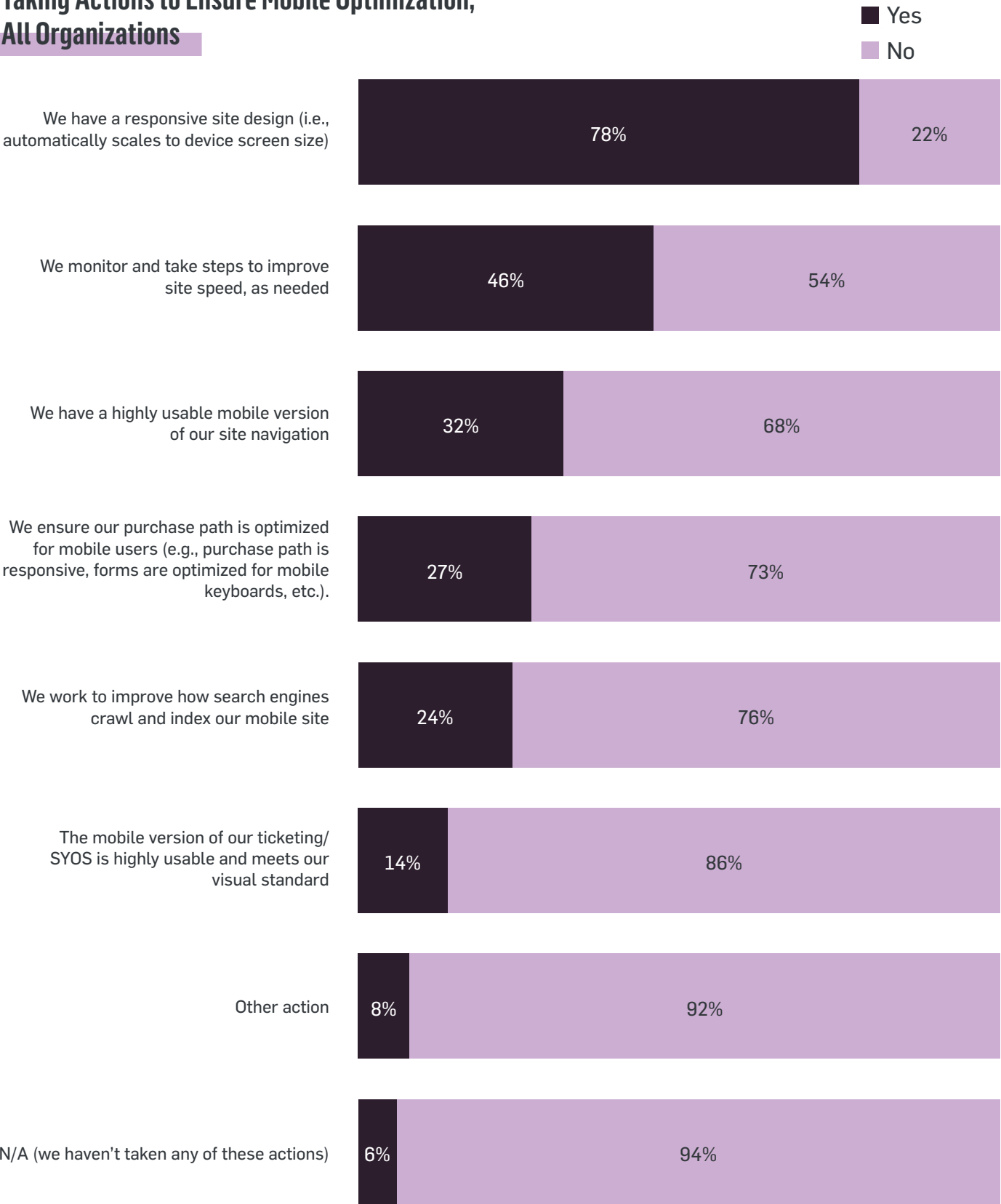


Figure 4.4

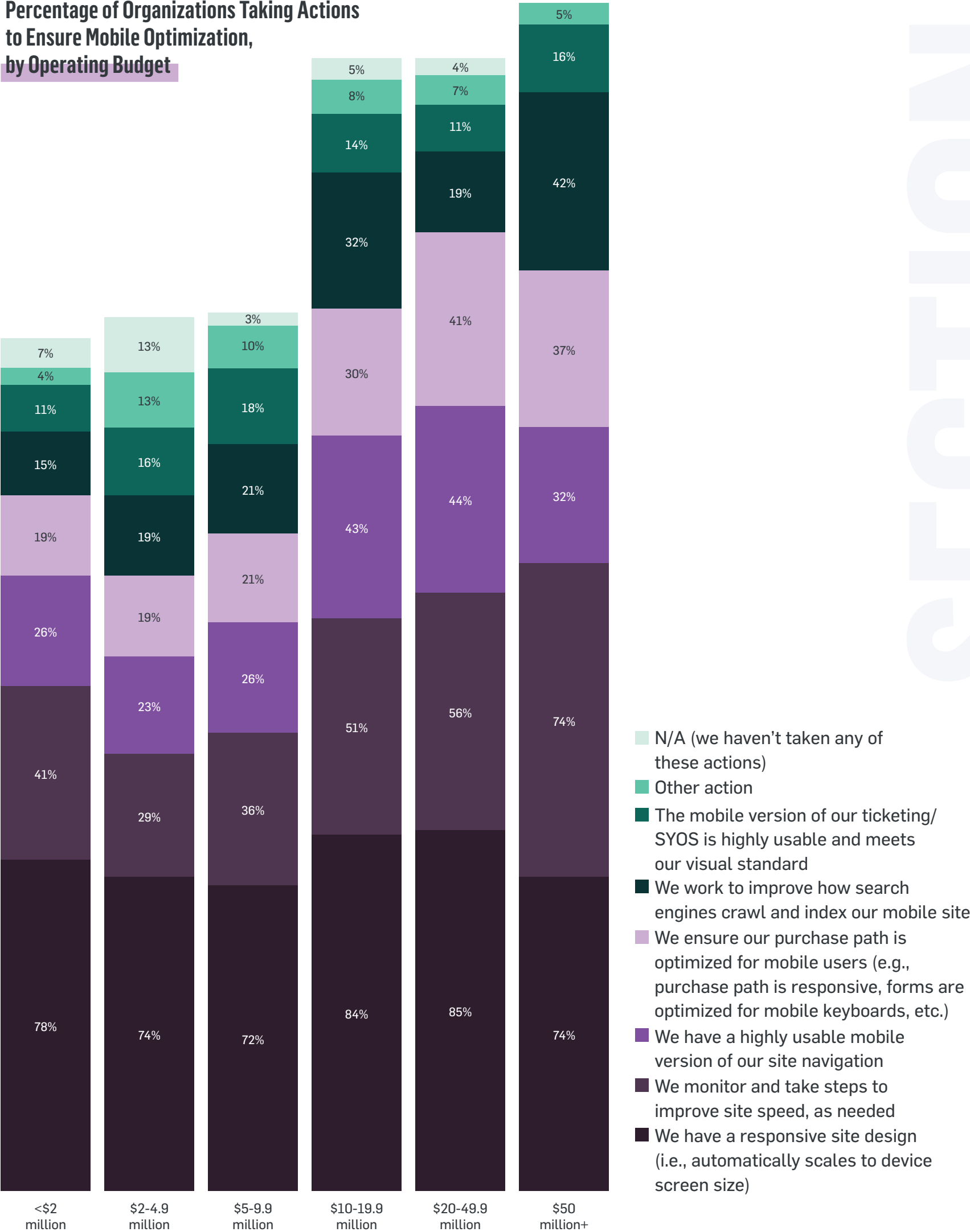
Percentage of Organizations Taking vs. Not Taking Actions to Ensure Mobile Optimization, All Organizations



The data suggests that the reported lack of attention to mobile optimization may come down to resources, since we see a difference in optimization efforts by operating budget size. Even though mobile visitation rates are fairly consistent across operating budget sizes (see Figure 4.2), mobile optimization efforts tend towards a gradual increase as operating budget sizes increase. Allocation of staffing and resources for mobile optimization is an area for all organizations, and particularly those in lower budget categories, to evaluate.

Figure 4.5

Percentage of Organizations Taking Actions to Ensure Mobile Optimization, by Operating Budget



Broadening the lens again, the average percentage of ticketing/admissions revenue made via online sales was 49%. The reported revenue percentages do not strictly correlate with operating budget size, a reminder that the importance of online purchase paths is not isolated to one end of the budget spectrum.

Connecting the Data

These numbers deserve careful consideration as we evolve into a world where more and more consumers expect seamless and easy e-commerce experiences. 79% of respondents in the [Performing Arts Ticket Buyer Study](#) indicated that they’re most likely to purchase tickets online.³⁷ If organizations present barriers to doing so, they risk leaving valuable money on the table.

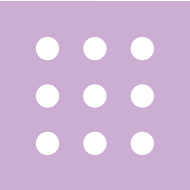
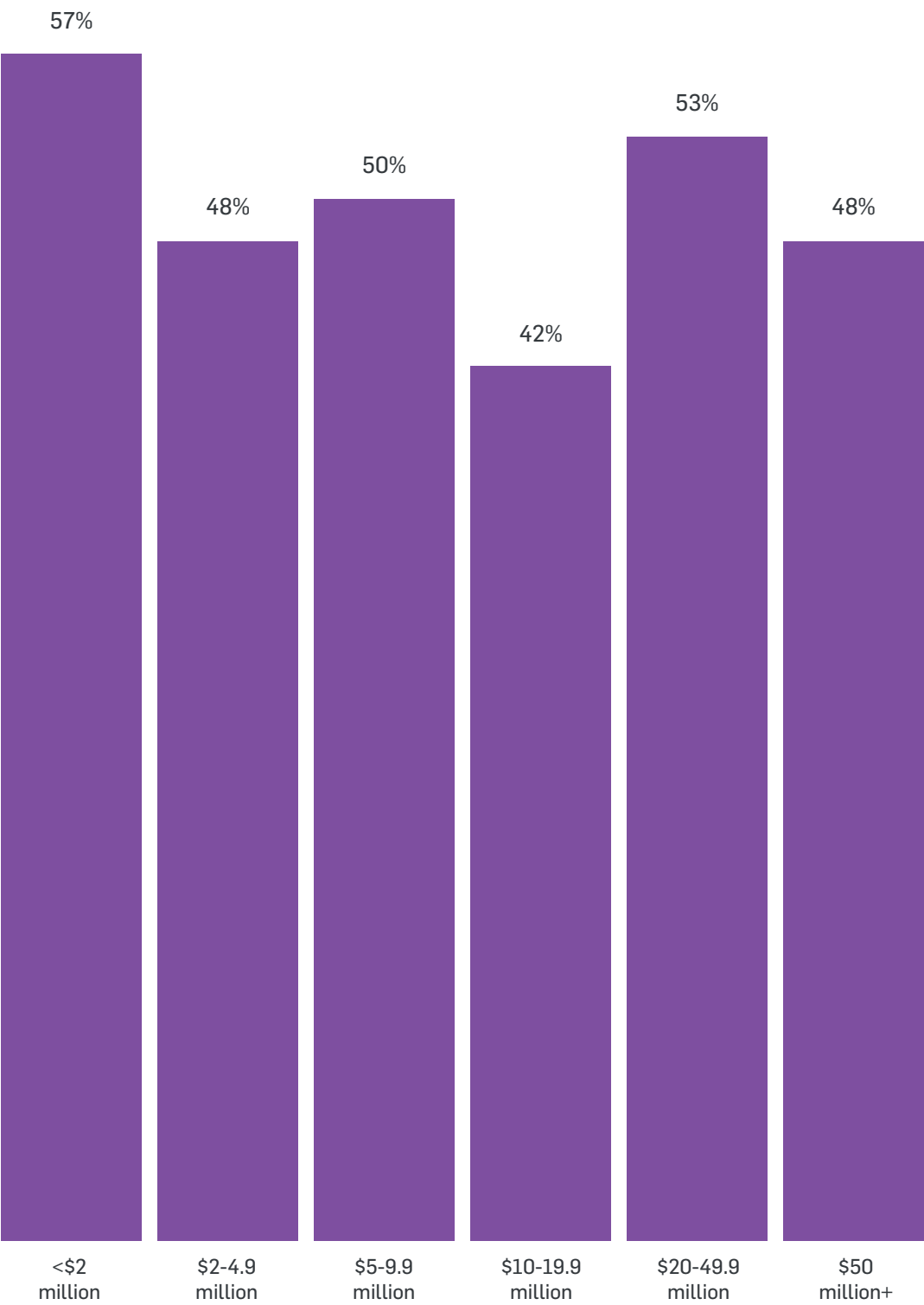
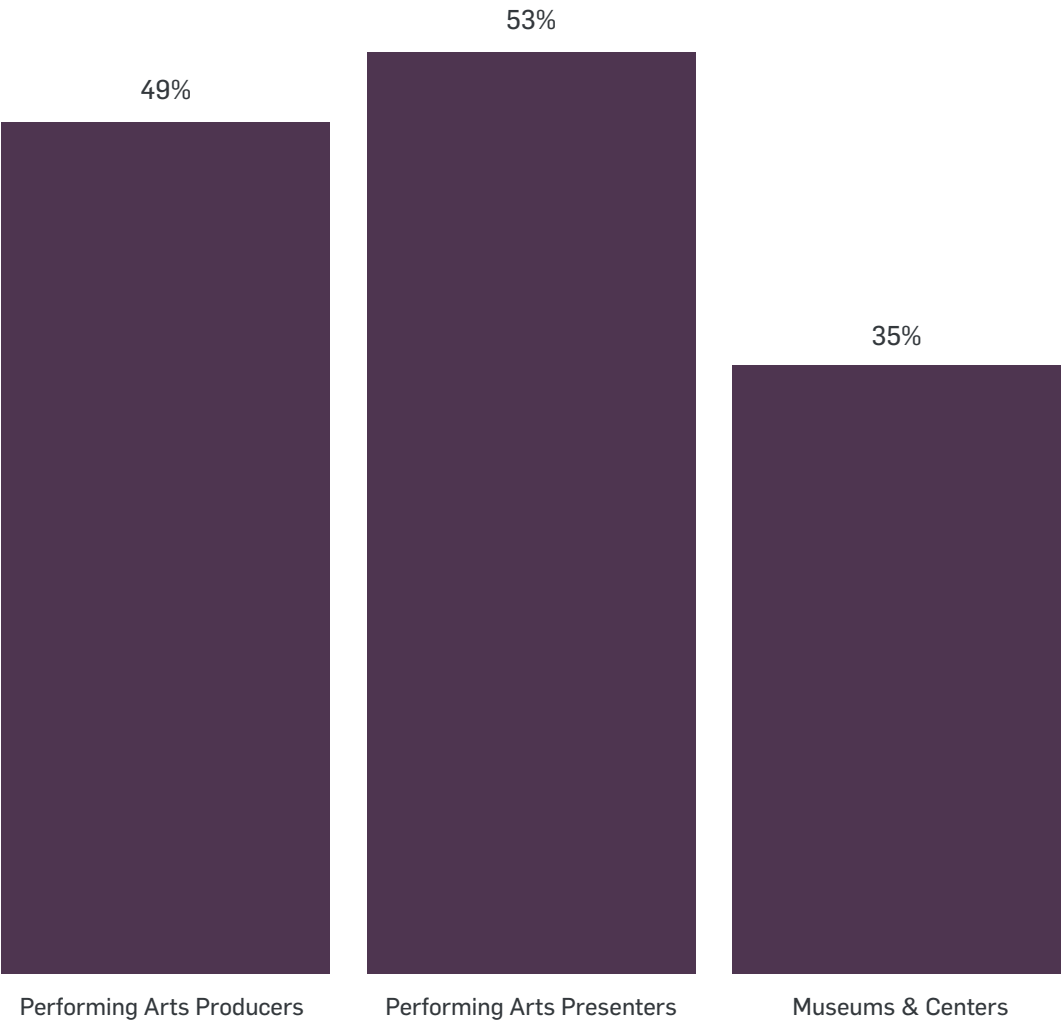


Figure 4.6
Average Percentage of Ticketing/Admissions Revenue via Online Sales, by Operating Budget



When looked at by organization type you see an expected pattern based on each category’s predominant model for ticketing. Performing Arts Presenters and Producers, with their emphasis on advance-purchase, fixed event ticketing, reported an average of 53% and 49%, respectively, and Museums/Centers reported an average of 35%.

Figure 4.7
Average Percentage of Ticketing/Admissions Revenue via Online Sales, by Organization Type



Looking more closely at e-commerce infrastructure we see that there’s a relationship between sophistication of e-commerce customization and operating budget. For example, there are more reports of custom API or heavily customized third party hosted solutions in operating budget categories of \$20 million+, and more reports of “off the shelf” solutions for the lowest two categories.

CI Insight

No one solution is right for all organizations, and by no means do all organizations need a custom-developed solution. But, there are baseline functionalities and user experience factors that are relevant to all. Given the reliance on third party solutions for e-commerce, as a field we need to collectively offer feedback and emphasize the priority of a highly-optimized mobile e-commerce experience to those partners.



Figure 4.8

Percentage of Organizations Using Specified E-Commerce Solutions, All Organizations

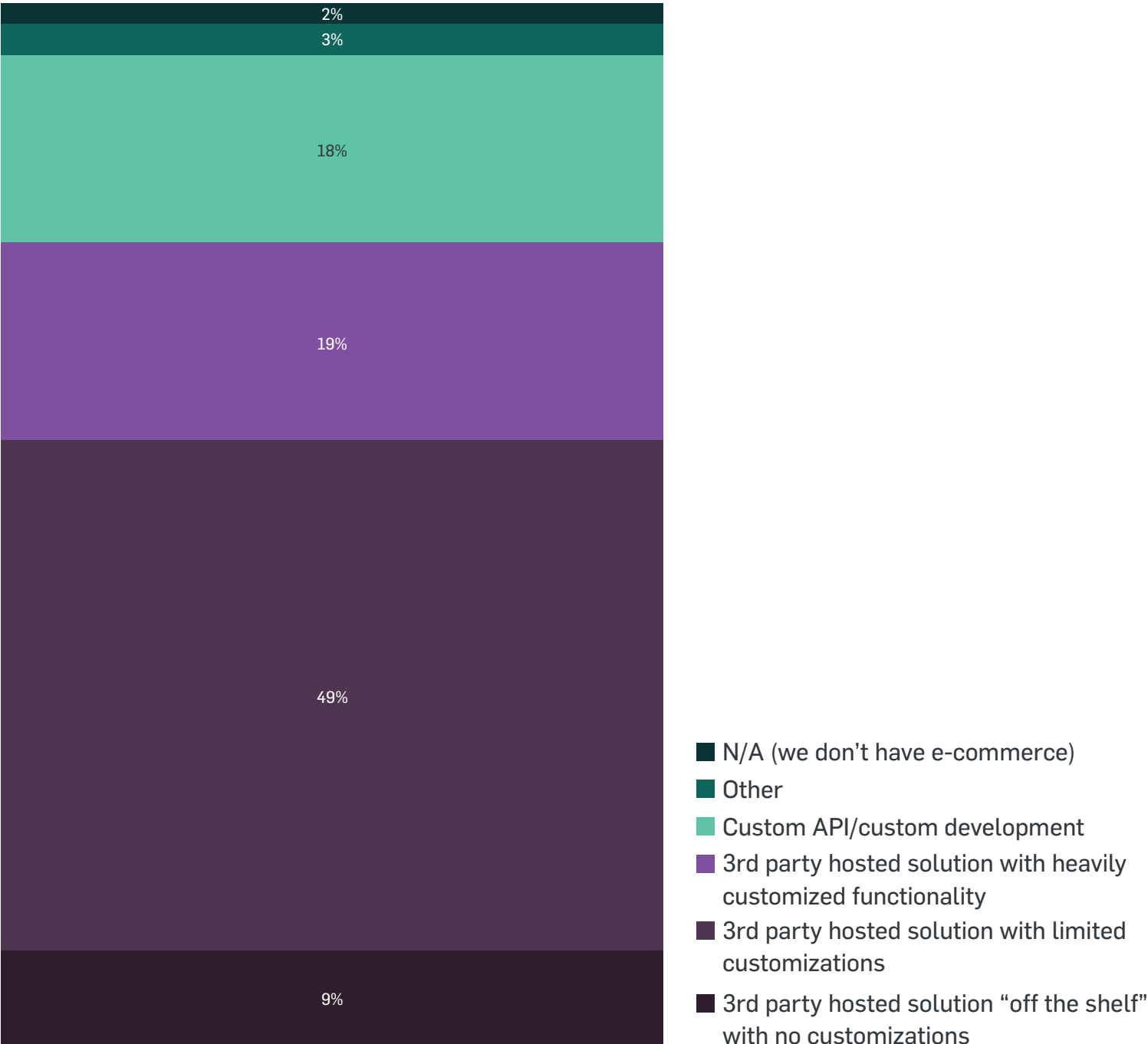
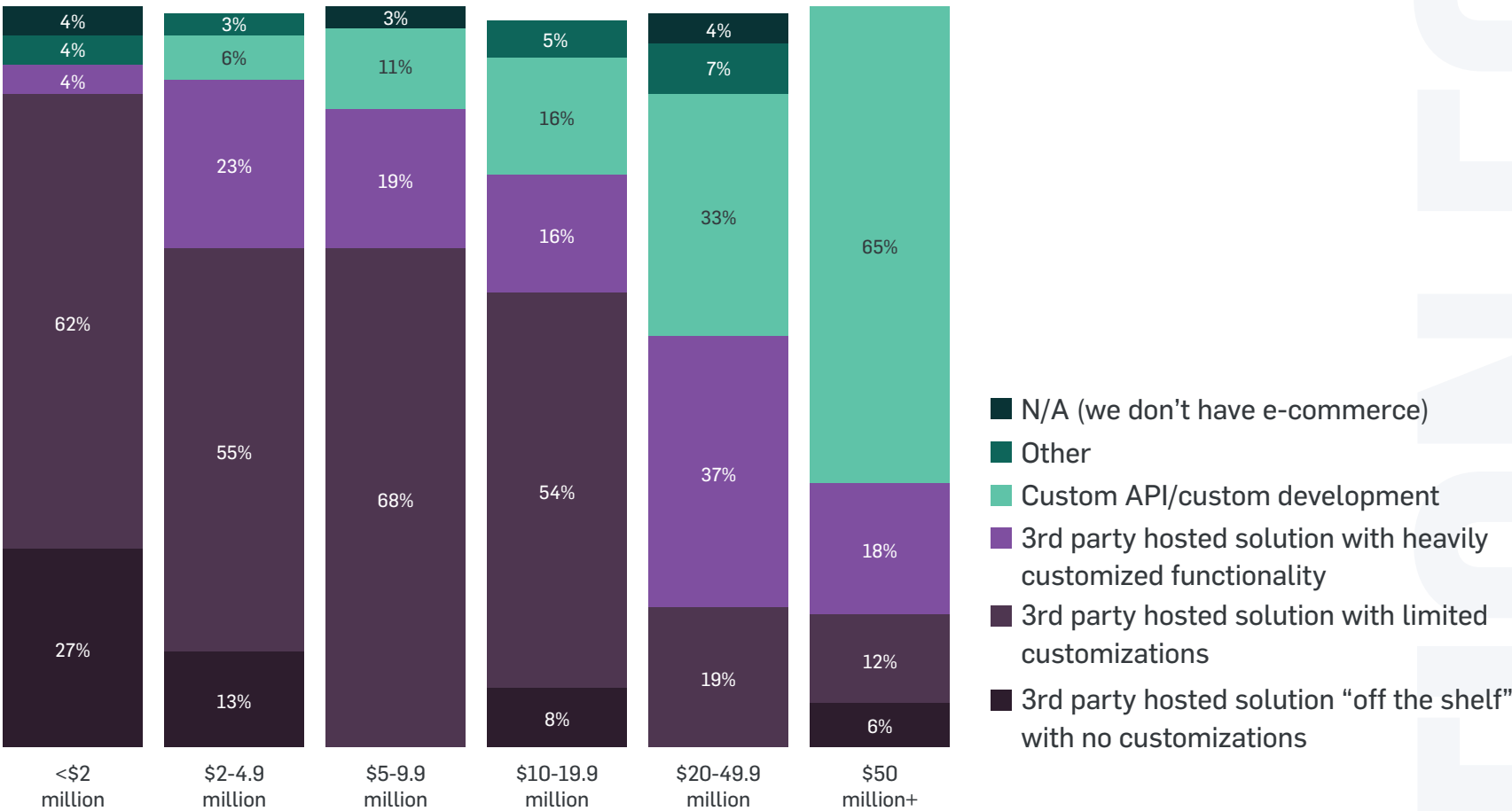


Figure 4.9

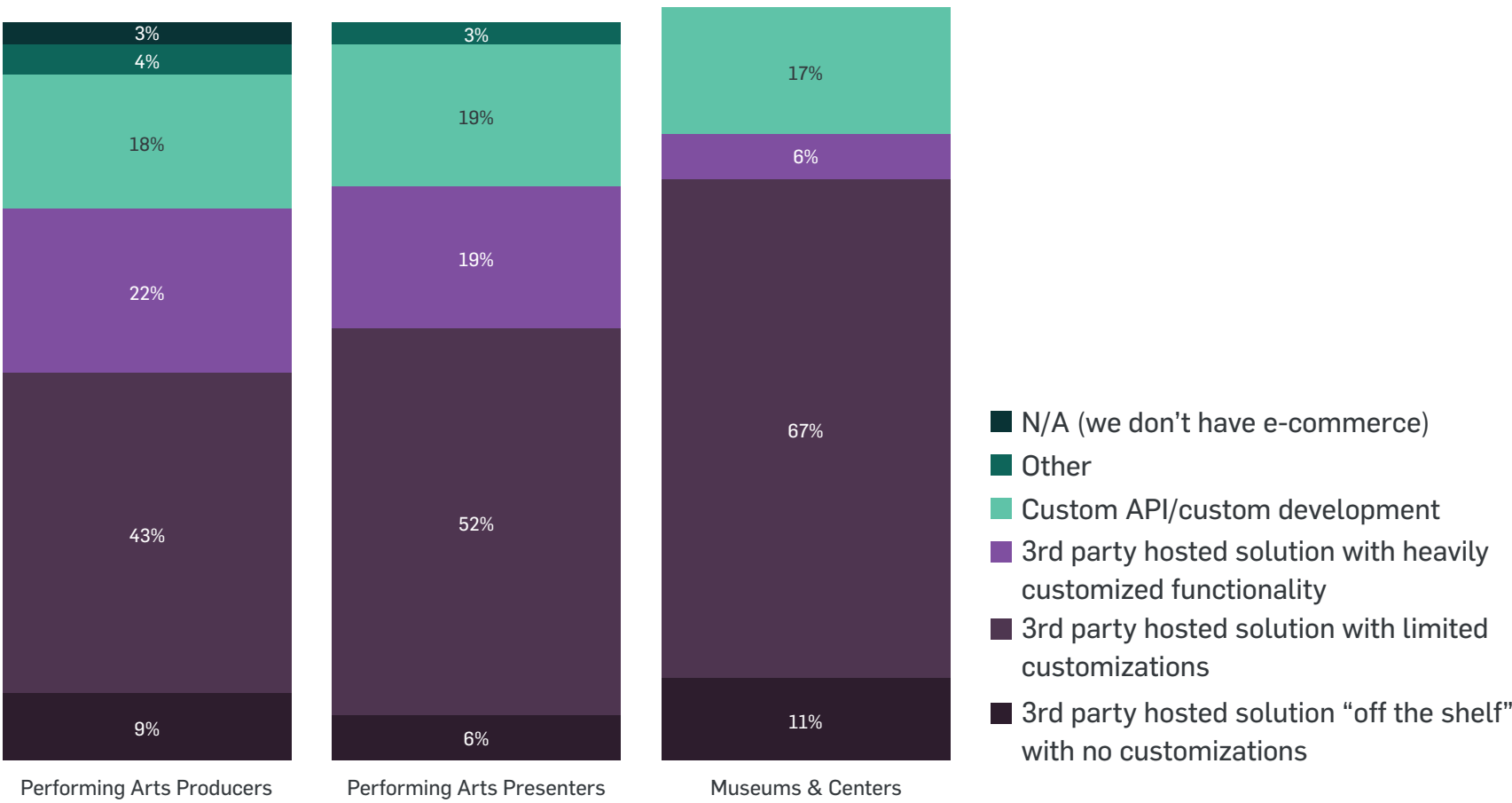
Percentage of Organizations Using Specified E-Commerce Solutions, by Operating Budget



Not unexpectedly given the comparatively lower patron demand for online ticketing, the cut by organization type shows that Museums/Centers have a much higher percentage reporting third party hosted solution with limited customizations (67% vs. 52% for Performing Arts Presenters and 43% for Performing Arts Producers).

Figure 4.10

Percentage of Organizations Using Specified E-Commerce Solutions, by Organization Type



In This Section: Website - Infrastructure & Planning

We focused many survey questions around what organizations are doing to plan for and manage their website and related infrastructure. The significance of the website to organizations can't be overstated, and it serves as the foundational infrastructure for many other topics we explore in this report:

Data & Analysis

All digital channels (and most analog ones, too!) lead to the website. With a solid tracking and analytics setup you can get to know your audience and the effectiveness of those channels.

Content Creation

Dynamic, tailored content is key across all digital channels, and that's particularly true on the website. Data from the [Performing Arts Ticket Buyer Media Usage Study](#) showed that 77% of ticket buyers are arriving on your website seeking content about upcoming programs (more than the 74% that come to purchase tickets!).³⁸ Based on the way audiences interact with your site you can optimize your site content by conducting A/B testing to see if changes to layout or content strategy drive more sales or engagement.

Patron Engagement

A consistent lead collection strategy to drive future engagement centers on the website. Audiences visiting your site can be tracked and targeted based on the content they're viewing through display networks, Facebook, and email, leading to even greater return on your website content and tracking investment.



Jump to the Data

- Website Redesign Frequency >
- Inputs for Website Redesigns >
- Frequency of Incremental Website Updates >
- Inputs for Incremental Website Updates >
- Website Decision Making >
- Management Challenges Around Website & Related Infrastructure >

Key Finding: Website Strategy & Leadership

We asked how organizations are informing their new site designs and found that, overall, patron-focused and data-informed inputs do not lead the charge. For example, whereas 62% of the surveyed organizations said they considered internal needs and priorities in their latest website redesign, only 25% utilized analytics data. In fact, the use of analytics data was only slightly more common than drawing on the opinions of leadership and board members (selected by 24% of the respondents).

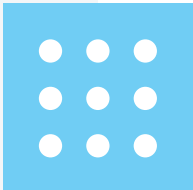
CI Insight

Analytics and patron-provided inputs are so important because they put the user first. Yet, some of the most data-centric elements were used the least- only 9% used market research, 7% used audience surveys/research (i.e., more formal than anecdotal feedback), and 1% used A/B testing. Website redesigns are crucial to organizational success, but they’re not guaranteed to be successful on their own. Given the investment of budget, time, and energy that goes into a redesign, and the infrequency with which they occur, organizations must do all in their power to position them for success.



Connecting the Data

We learned from the [Performing Arts Ticket Buyer Media Usage Study](#) that 77% of respondents indicated that they visited the study partner’s website to read about upcoming programs and 74% visited to purchase tickets.³⁹ Yet, in total, only 52% of organizations indicated that the marketing department leads decision making for strategy, planning, updates, and redesigns for their website. Another 37% indicated that they have significant input, but do not have the leadership role for the website. Not only is the website a foundational marketing tool, it’s central to achieving broader organizational goals- from developing patrons and an understanding of your mission to delivering on contributed and earned income. Marketing must play a leadership role in positioning the website as such and providing guidance for achieving organizational goals in a cohesive way.



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Section Detail

We explored the tempo of website redesigns amongst organizations. The average time between organizations’ two most recent website redesigns is 5.3 years.

Figure 5.1

Average Time Between Two Most Recent Major Website Redesigns and Average Number of Years Since Latest Redesign, All Organizations



We found a loose relationship between operating budget and the pace of redesigns (more frequent as operating budget increases), and only slight variation emerged between organization types.

Figure 5.2

Average Time Between Two Most Recent Major Website Redesigns, by Operating Budget

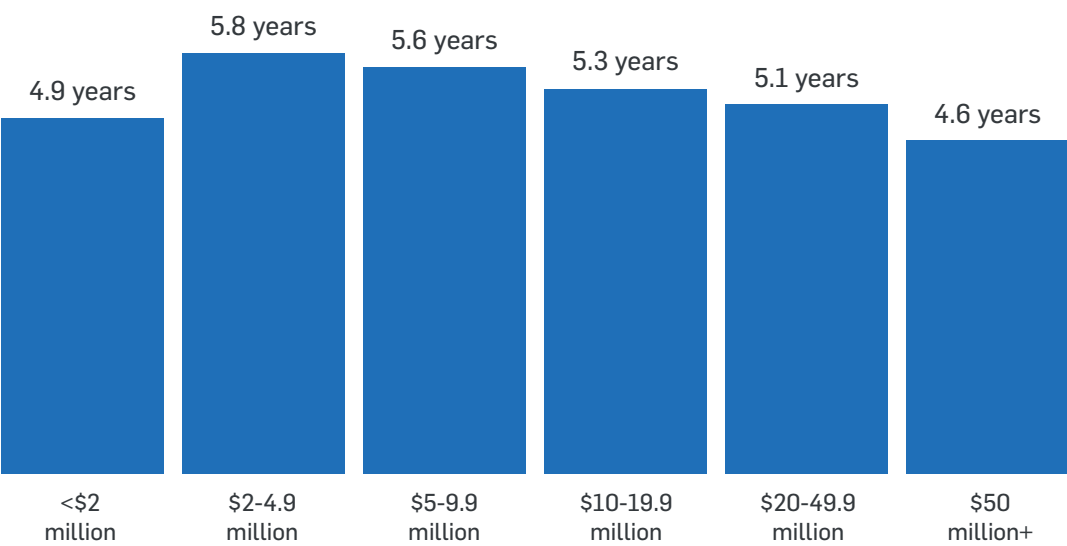
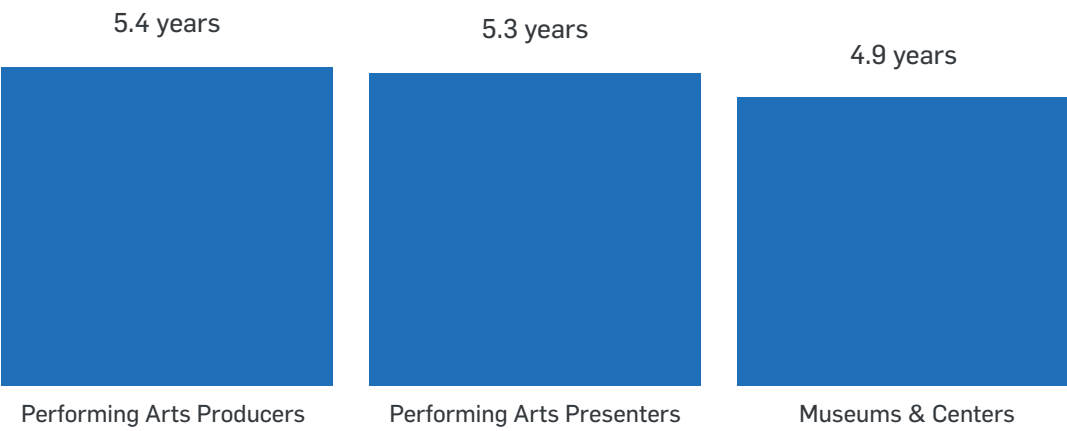


Figure 5.3

Average Time Between Two Most Recent Major Website Redesigns, by Organization Type

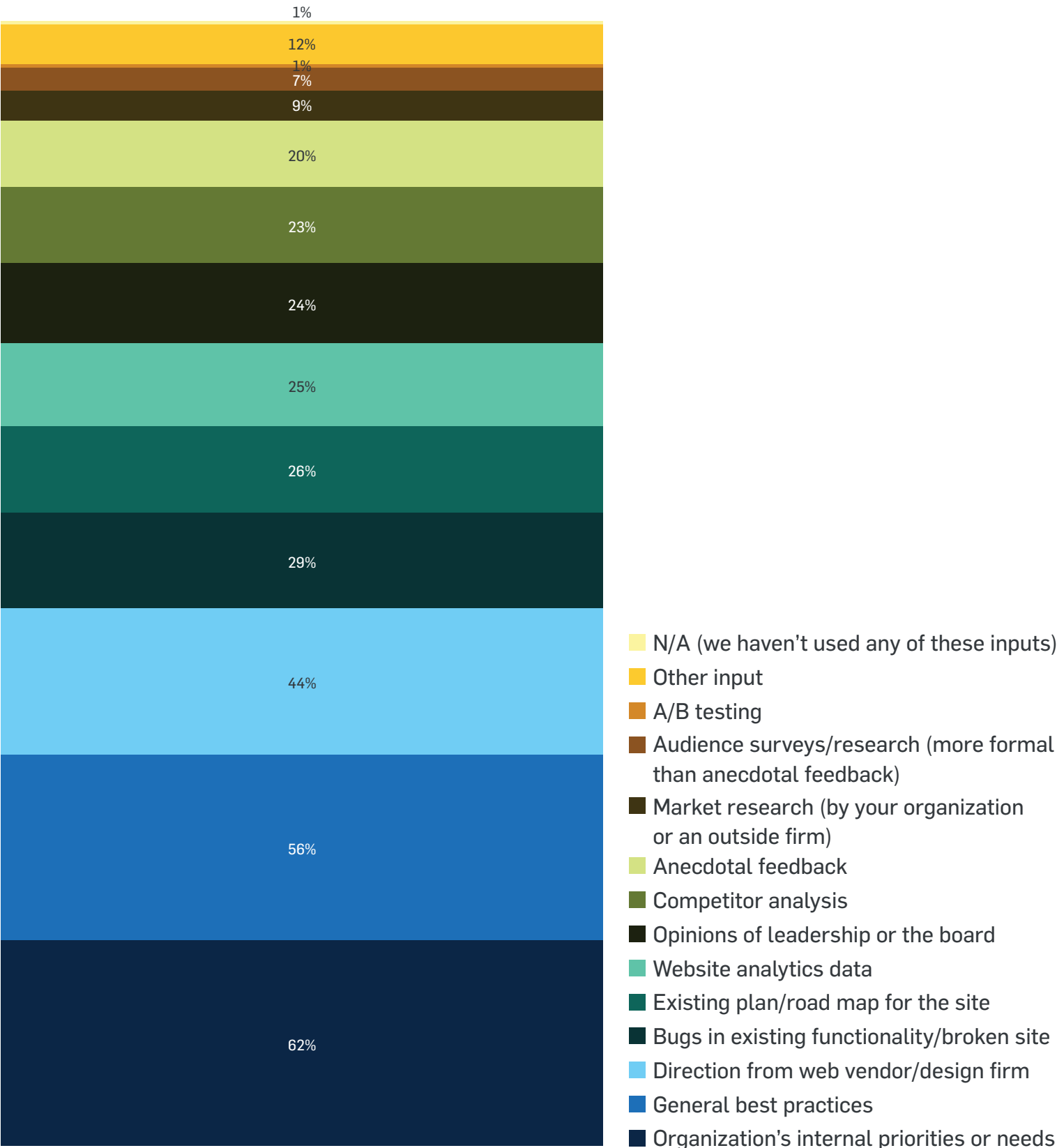


Overall, it appears that patron-focused and data-informed inputs are not leading the charge for informing redesigns. The most frequently selected inputs reported by organizations are internal priorities or needs (62%), general best practices (56%), and direction from a web vendor (44%). While the latter two are good reference points as part of a broader approach, as a field we need to embrace innovation rather than simply follow the status quo. A prioritized focus must be placed on data from your actual website users.

Yet, using analytics data was only selected by 25% of all responding organizations, nearly tied with opinions of leadership or the board, which was indicated by 24% of organizations. Some of the most data-centric elements were used by less than 10% of organizations- only 9% used market research, 7% used audience surveys/research (i.e., more formal than anecdotal feedback), and 1% used A/B testing.

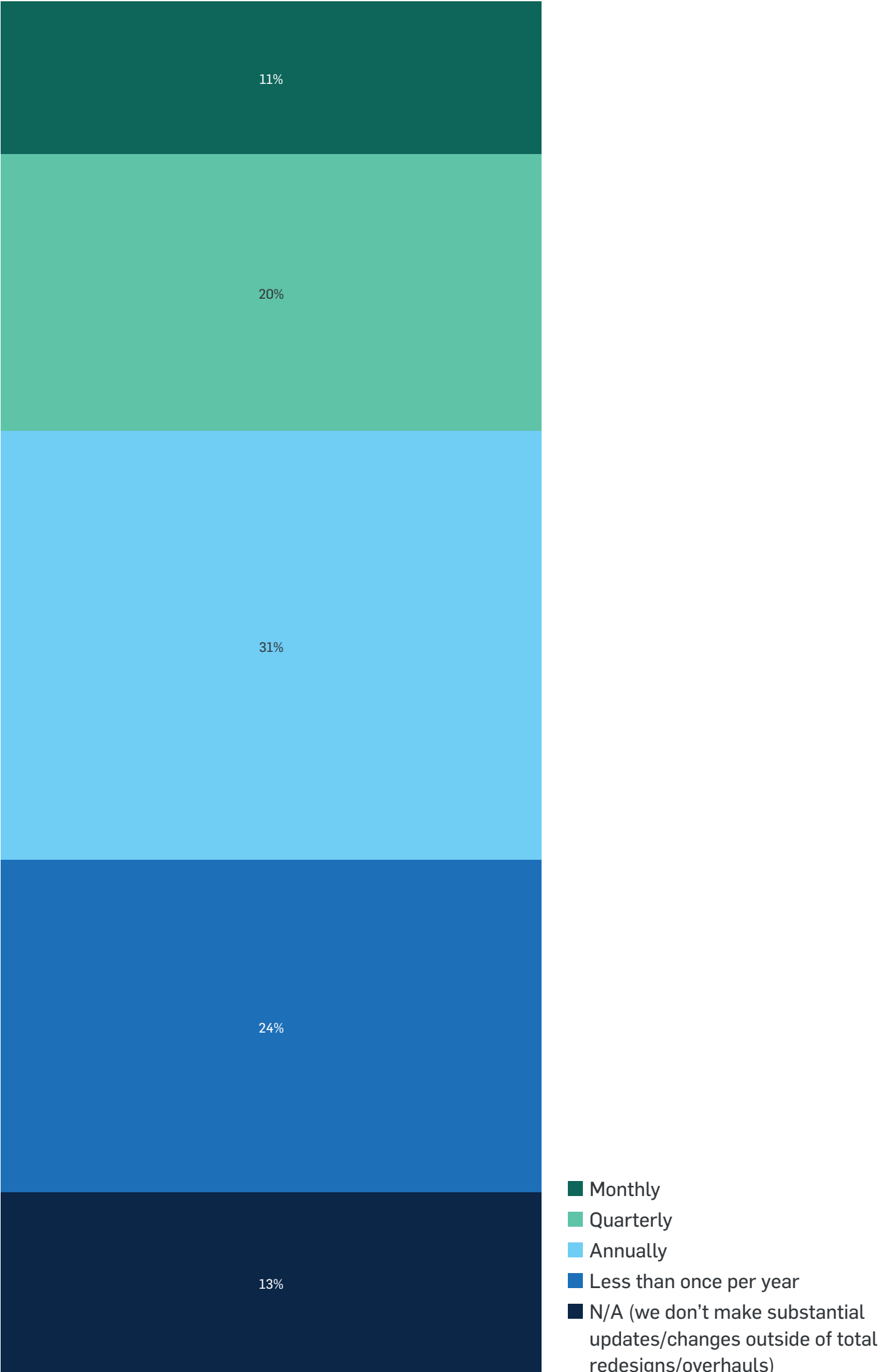
Figure 5.4

Most Significant Inputs for Most Recent Website Redesign (Choose Up to Four), All Organizations



Websites are never perfect on their launch date, so incremental updates are necessary to adapt your site based on the way users are responding to, and interacting with, it. The majority of organizations reported that they do so annually (31%) or less frequently (24%).

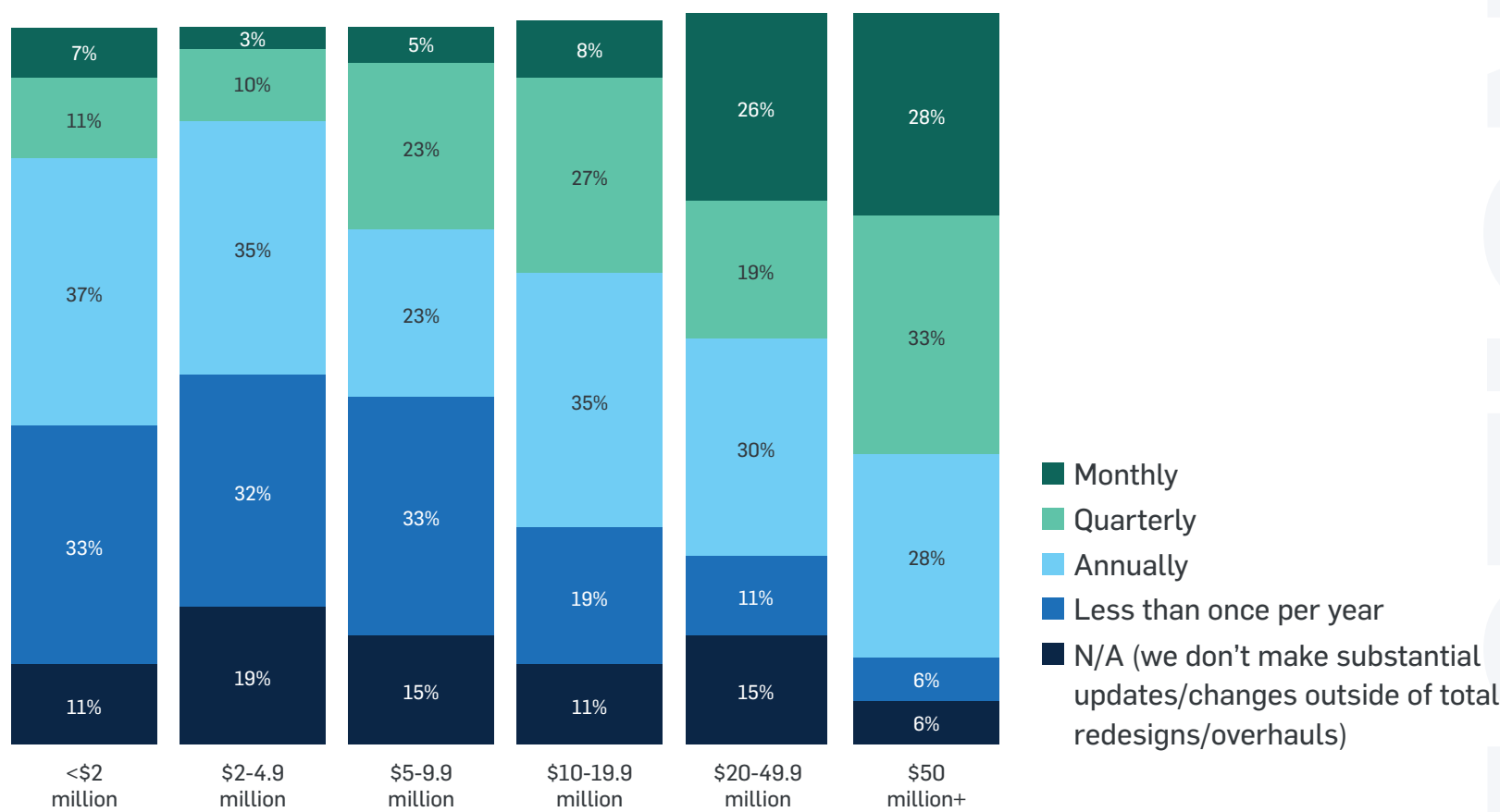
Figure 5.5
Frequency of Incremental Website Updates,
All Organizations



Not surprisingly, the reported rate of incremental updates generally correlates with operating budget. Incremental updates require insights into changes to be made and then the time and resources to make and test those changes- which, in turn, requires the prioritization of time and resources.

Figure 5.6

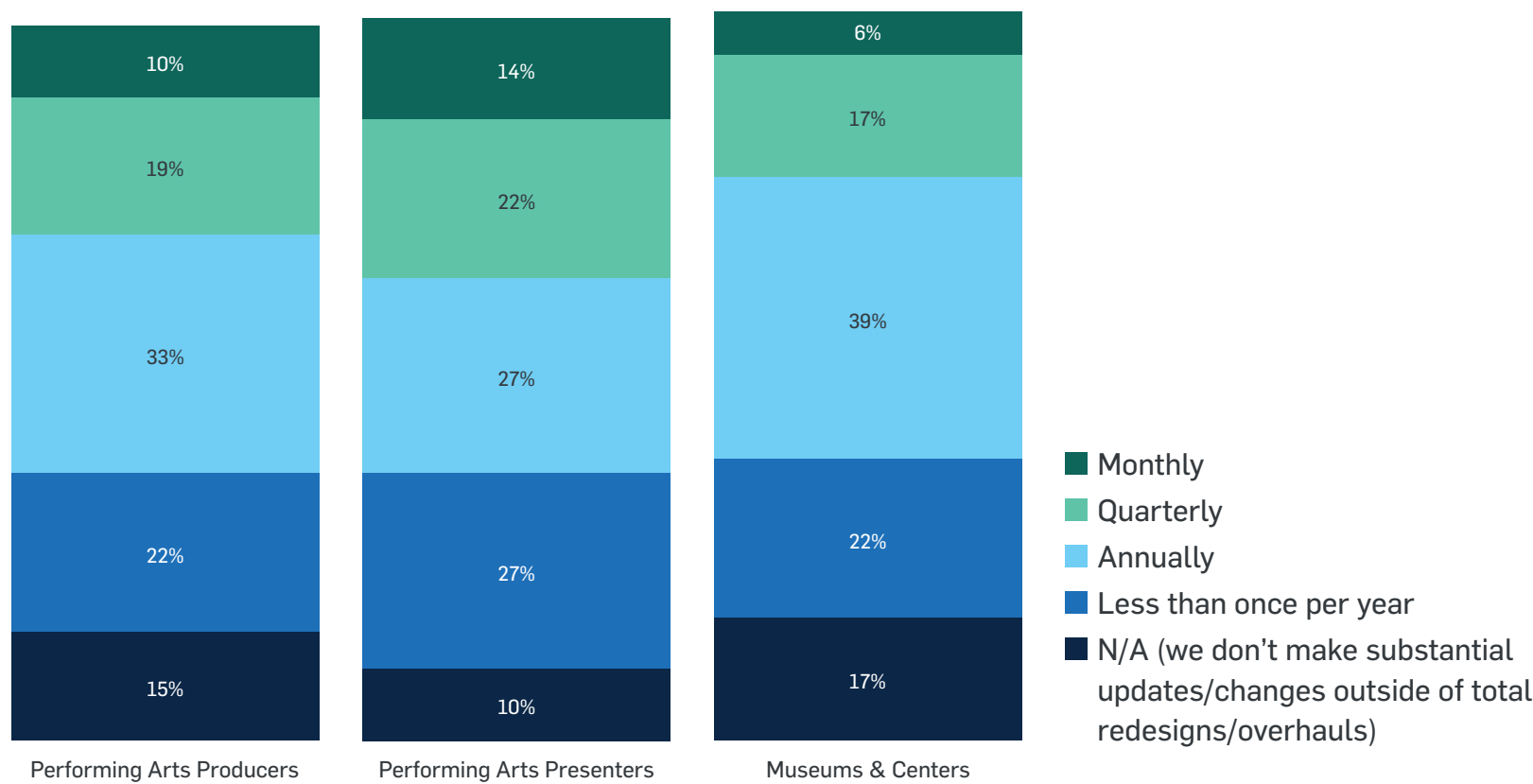
Frequency of Incremental Website Updates,
by Operating Budget



There were subtle differences between organization types, with Performing Arts Presenters and Producers making incremental updates more frequently than Museums/Centers.

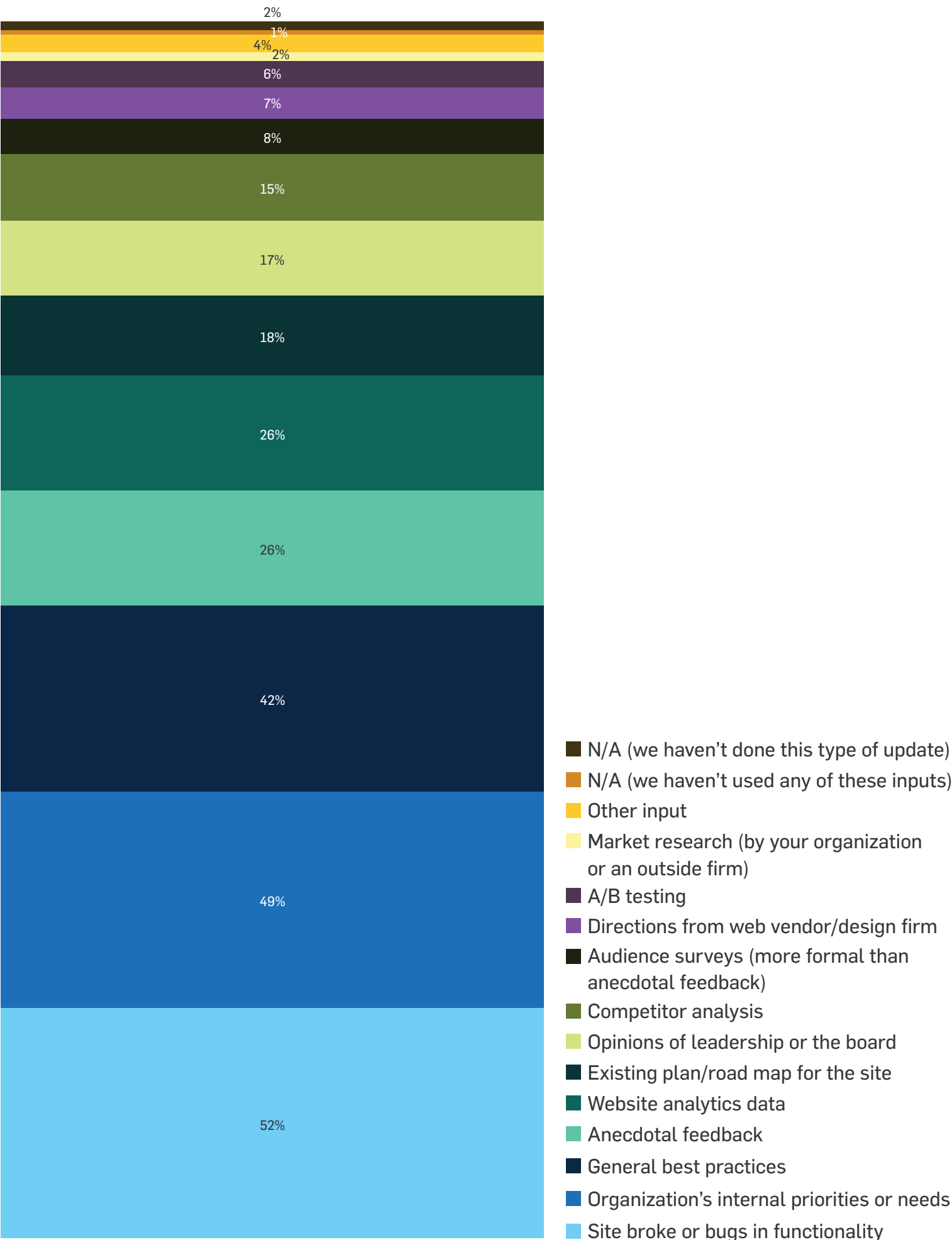
Figure 5.7

Frequency of Incremental Website Updates,
by Organization Type



As with the major redesign inputs (noted above), it appears that more subjective and organization-focused inputs are driving incremental updates, rather than data-informed, patron-centric inputs. Of note, using analytics data was a relatively infrequent response, selected by just 26% of organizations, and tied with anecdotal feedback. Other data-centric inputs were reported by less than 10% of organizations- only 8% used audience surveys/research (i.e., more than anecdotal feedback), 6% used A/B testing, and 2% used market research.

Figure 5.8
Most Significant Inputs for Incremental Website Updates (Choose Up to Four), All Organizations



In total, 52% of organizations indicated that the marketing department led decision making for the strategy, planning, updates, and redesigns for their website. Another 37% indicated that they have significant input for this foundational marketing tool.

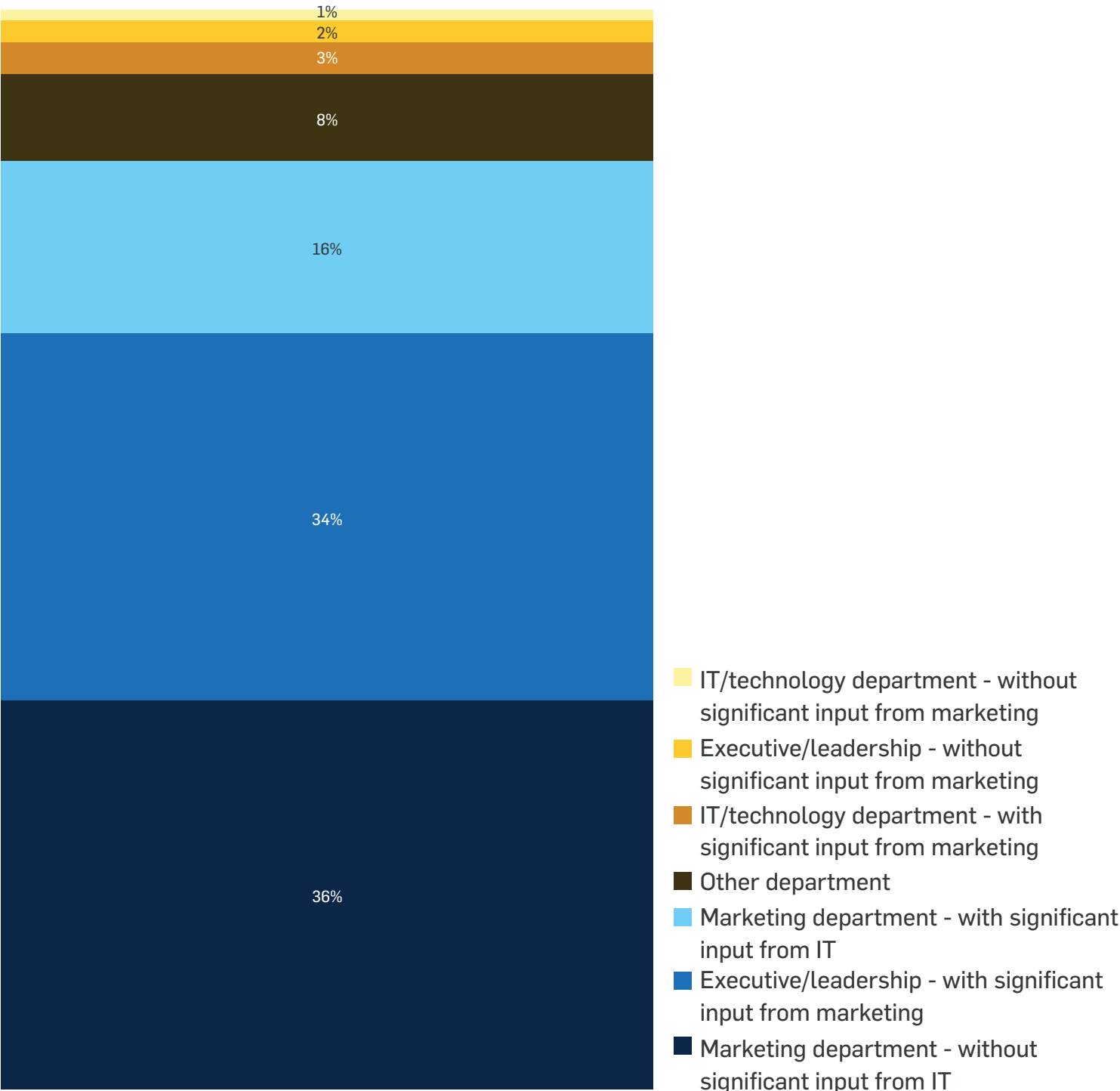
CI Insight

While there is not one right model for achieving a cohesive, patron-centric website, it’s critical that marketing play a leadership role as the website is fundamentally a marketing vehicle. The right mix of people must be brought to the table to tap necessary expertise (both inside and outside the organization), develop a strategy that breaks down any silos around data and patron relationships, and achieve buy-in across the organization around the website’s importance.



Figure 5.9

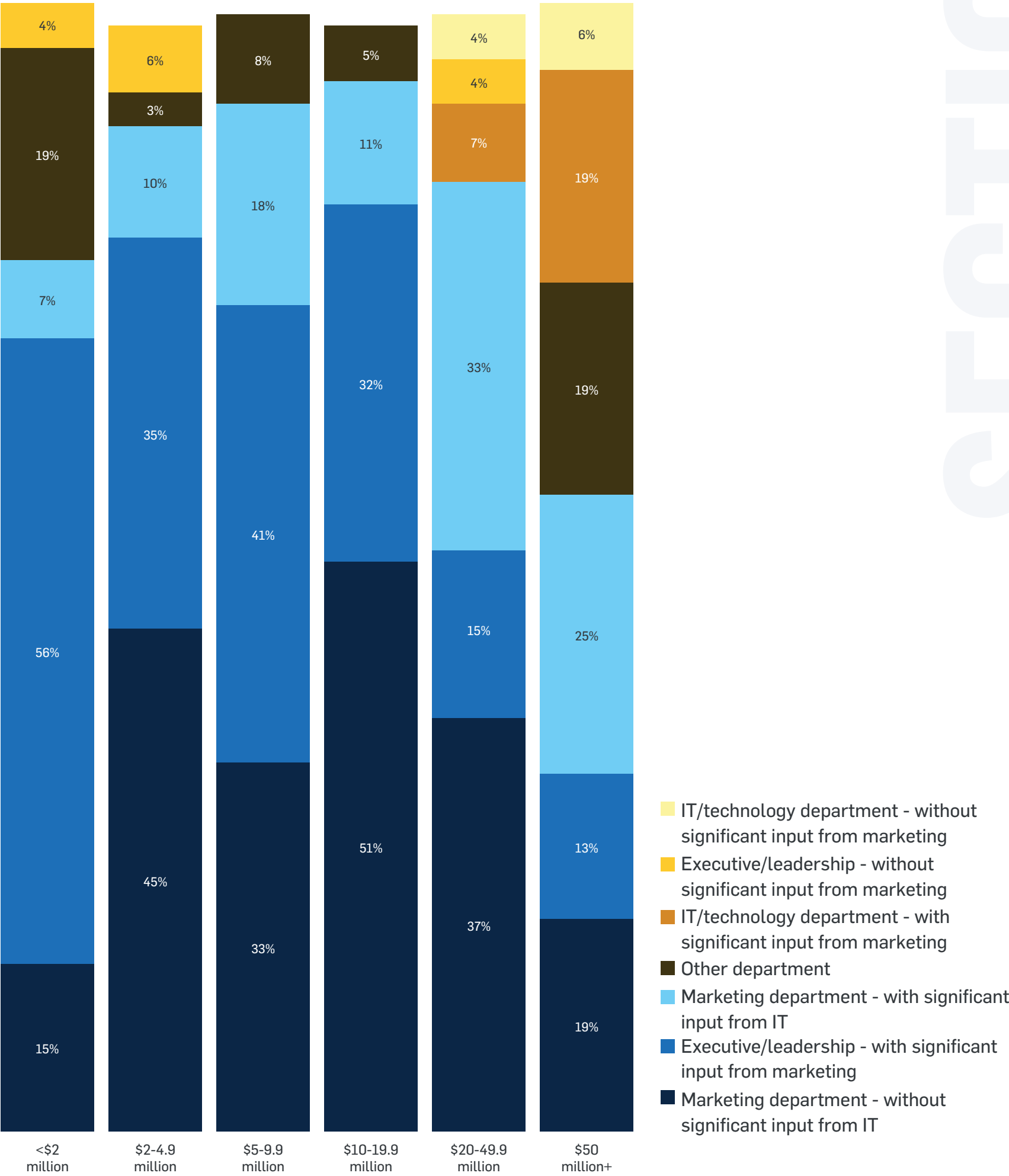
Percentage of Organizations Reporting Specified Website Decision Making Models, All Organizations



When looked at by operating budget, you see that the role of the executive/ leadership team in website management generally diminishes as operating budget size increases. You also see more varied reporting of leadership approaches by organizations in the two largest budget categories. In those two categories, involvement of the IT/technology department increases (either as providing significant input to the marketing department (33% and 25%, respectively), or through direct leadership of the website (11% and 25%, respectively)).

Figure 5.10

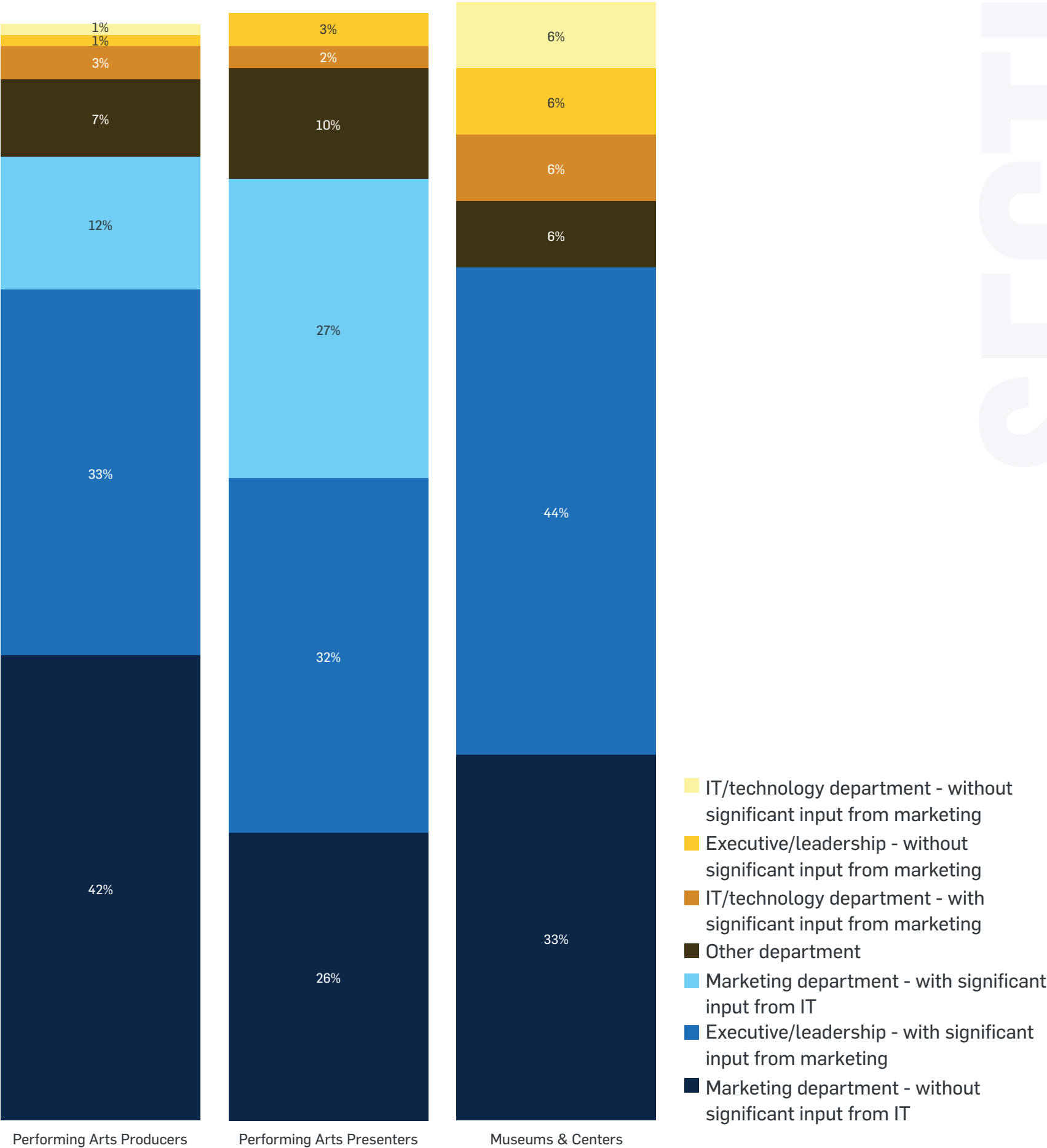
Percentage of Organizations Reporting Specified Website Decision Making Models, by Operating Budget



When looked at by organization type you see variations between the three categories, notably that Museums/Centers reported less marketing department leadership in website decision making (33%) than Performing Arts Producers and Presenters (54% and 53%, respectively). Museums/Centers more frequently reported leadership by the executive/leadership team (50% compared to 34% of Performing Arts Producers and 35% of Performing Arts Presenters). Also of note, Performing Arts Presenters more frequently reported significant involvement or leadership of the IT/technology department (29% compared to 16% for Performing Arts Producers and 12% for Museums/Centers).

Figure 5.11

Percentage of Organizations Reporting Specified Website Decision Making Models, by Organization Type



The two most frequently cited website and related infrastructure challenges across all organizations, and consistent across all budget sizes, were limitations around the ticketing system/CRM and inadequate budget allocated to the areas of website/related infrastructure in the organization. As we saw in the data in [Figure 4.6](#), online ticket sales are relevant to organizations belonging to all operating budget sizes. Given that it relates to the moment of patron conversion, the reported ticketing system/CRM issues are particularly troubling.

Figure 5.12

Most Significant Website & Related Infrastructure Management Challenges Faced by Marketing Teams (Choose Up to Four), All Organizations

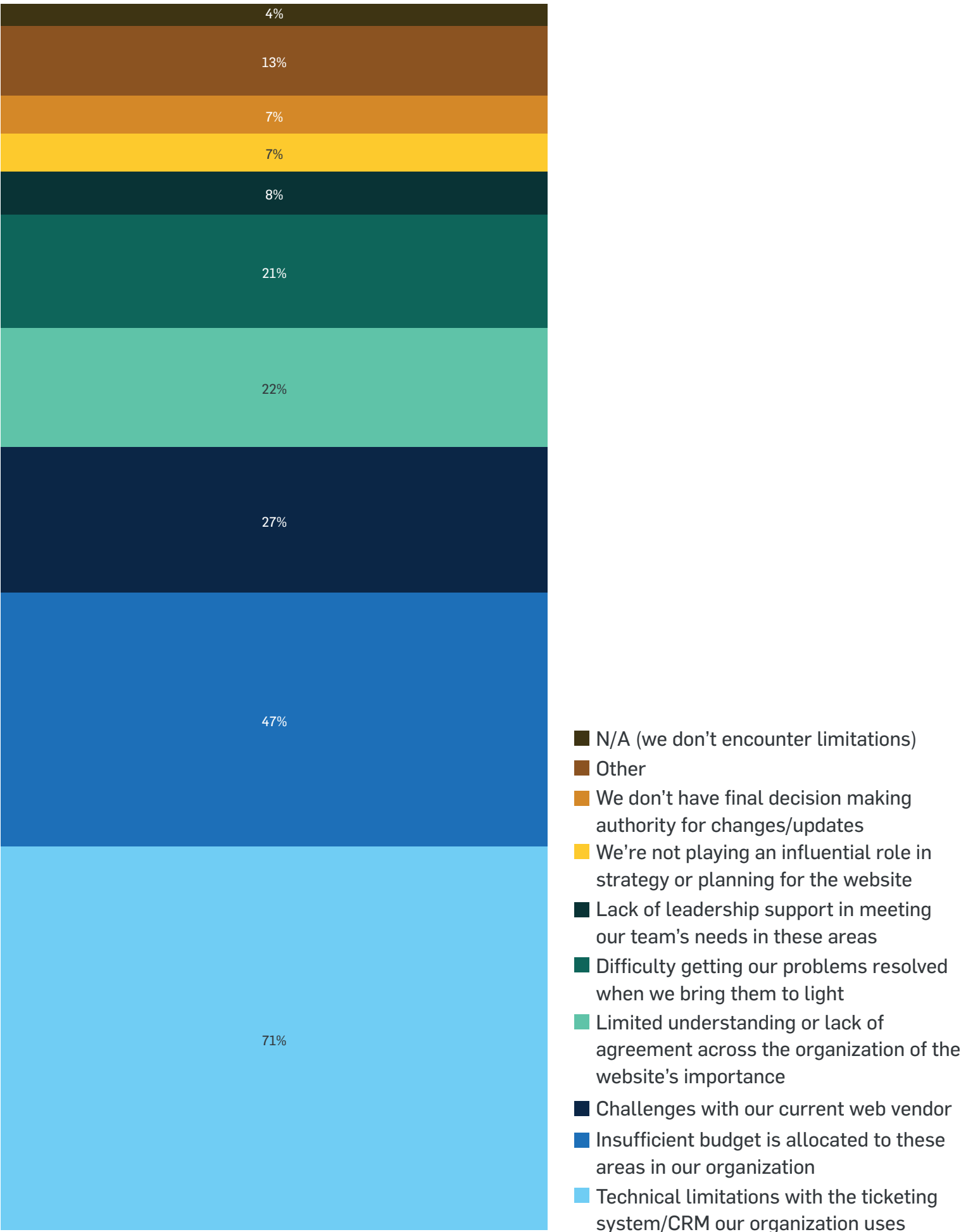
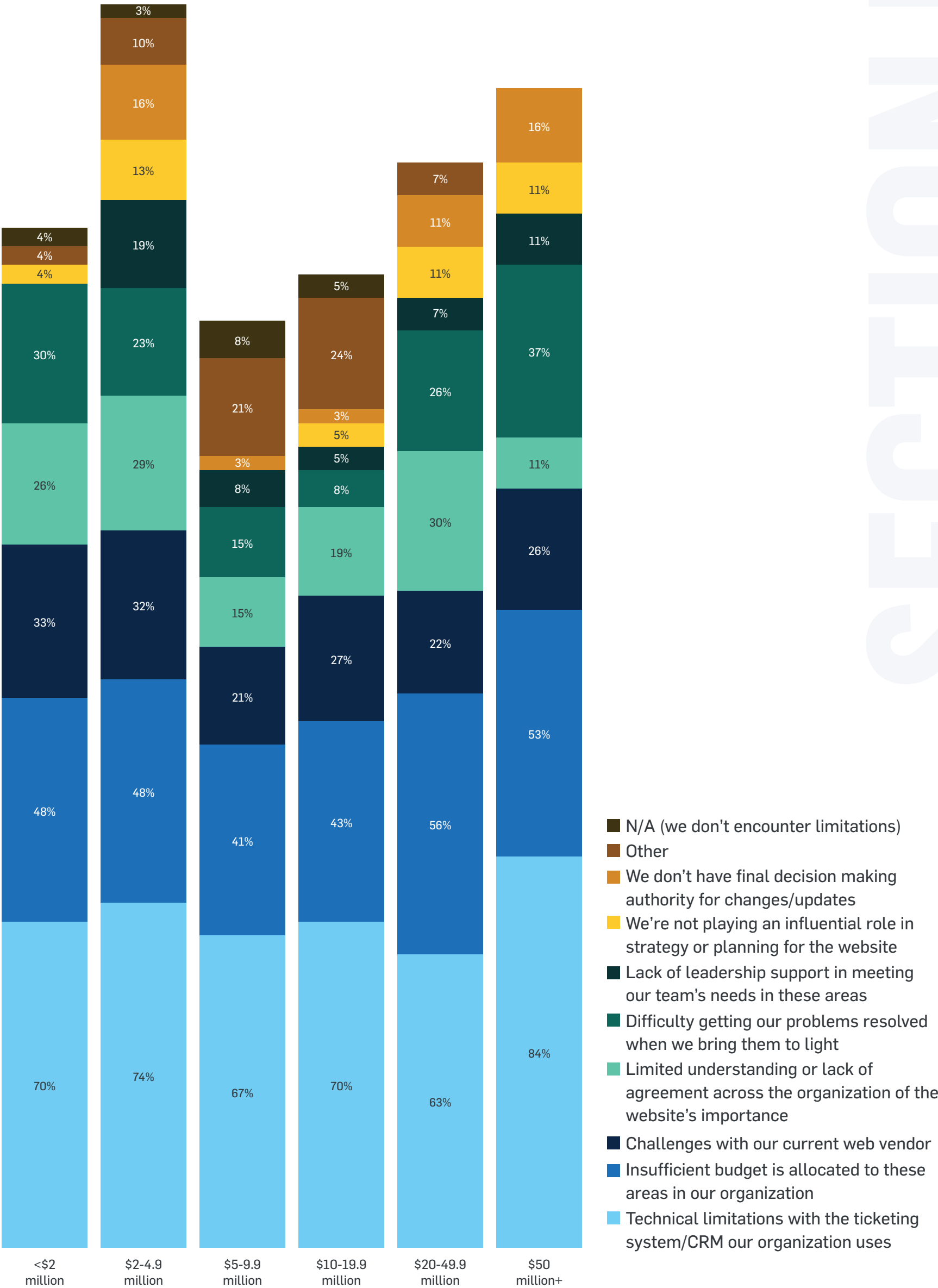


Figure 5.13

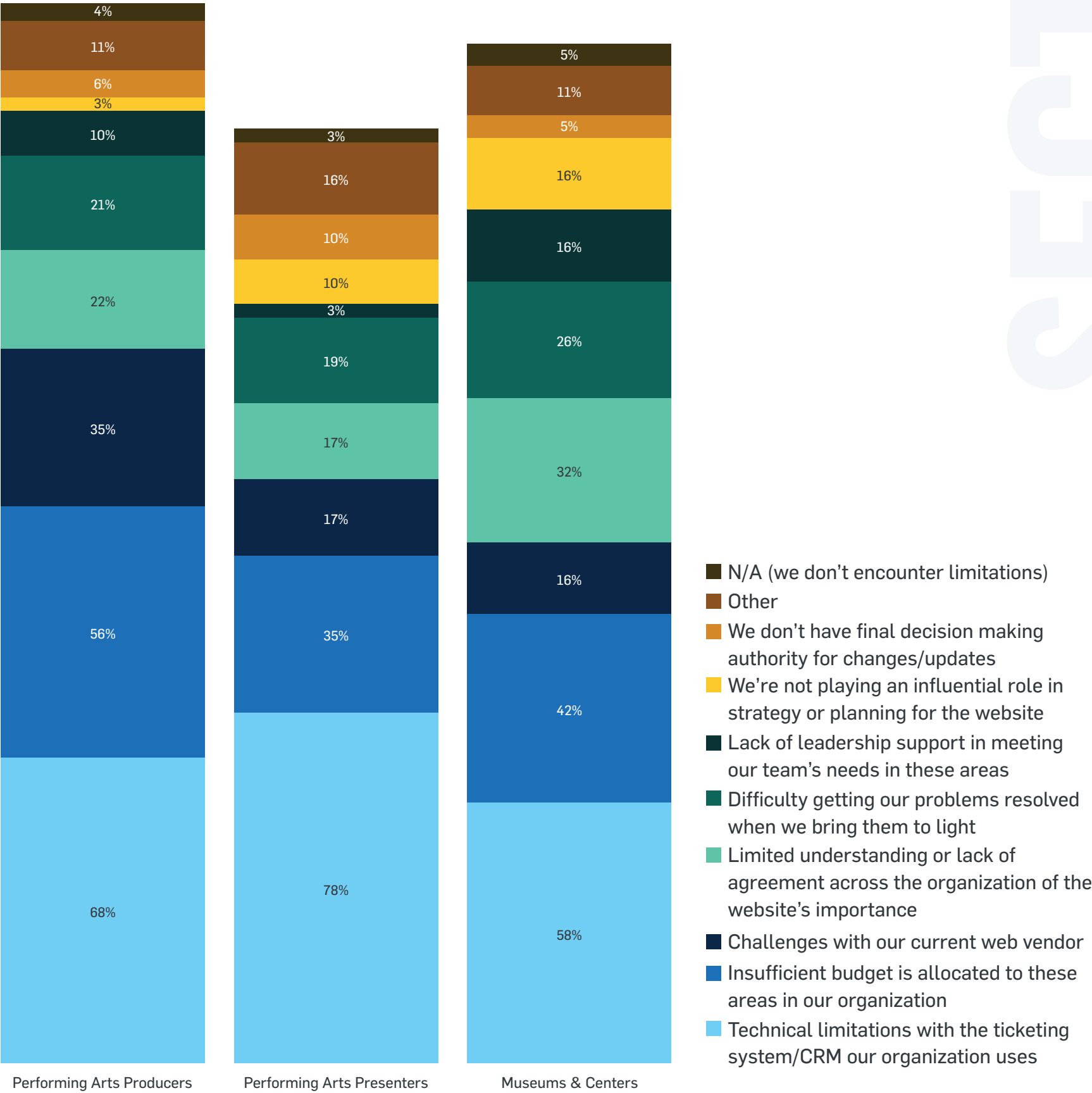
Most Significant Website & Related Infrastructure Management Challenges Faced by Marketing Teams (Choose Up to Four), by Operating Budget



The two most reported challenges of ticketing system/CRM limitations and inadequate budget allocated to the website/related infrastructure were the most consistently reported across organization types, as well. Variations in other responses paint a picture of the current state of challenges in the management of websites and related infrastructure at each type of organization. More often than Performing Arts Presenters and Producers, Museums/Centers reported that the marketing department is not playing an influential role in strategy or planning for the website, there’s limited understanding or lack of agreement across the organization of the website’s importance, and a lack of leadership support in meeting their marketing team’s needs in these areas.

Figure 5.14

Most Significant Website & Related Infrastructure Management Challenges Faced by Marketing Teams (Choose Up to Four), by Organization Type



In This Section: Digital Marketing Channels - Email & Facebook

For the new Benchmark, we focused in on metrics and practices for two of the most prominent and influential channels for arts organizations: email and Facebook. These channels work so well because they are flexible, highly-customizable vehicles for delivering anticipated, relevant, and personal content to targeted segments of patrons.⁴⁰ As a reminder, data from the [Performing Arts Ticket Buyer Study](#) made it clear that these channels are relevant to nearly all patrons. Across all age cohorts, over 85% of respondents said email is the primary source of information for upcoming arts events. Facebook is used most out of all social platforms, with 65% of respondents reporting weekly use. 80% of all under 35-year-olds use Facebook weekly or more, making it an omnipresent channel for younger patrons, and even 54% of the 65+ cohort use it at the same frequency.⁴¹ Beyond email and Facebook, it's important to note that Instagram increasingly delivers audience engagement in unprecedented ways.⁴² We're curious to see how the field's use of the platform evolves, and we plan to track use and performance of both Facebook and Instagram in future iterations of this study.



Jump to the Data

- Email Strategy Practices >
- Email Open Rate Metrics >
- Facebook Reach & Post Reactions Metrics >

Key Finding: Email Metrics & Practices

Organizations reported that pre- or post-performance, exhibition, or event emails, as well as triggered emails based on patron behavior, yielded impressive open rates ranging between 44-50%. This range is far above the average 26% reported for more commonly used newsletters or promotions.

CI Insight

Email is an ideal platform to showcase the power of compelling, customized content and the strategic use of data. Despite this capacity, the data shows that organizations are not widely embracing the email practices, such as detailed segmentation and triggered cascades based on changes in relationship, that are necessary for the email types that perform best. Growing these practices takes effort, but it’s a low cost and very high value opportunity for organizations to reach engaged patrons with anticipated, relevant, and personal email content.⁴³



EXHIBITION
NOTES

Section Detail

When it comes to the management of email, the five most frequently selected practices are the same across all budget categories. Overall reporting of email practices correlates with operating budget size and steps up noticeably beginning at the \$10-19.9 million category, suggesting a staff/resourcing factor. Outside of general segmentation, no email practices are consistently used by a wide majority of organizations, which indicates room for growth across operating budget categories.

The email practices of detailed segmentation (reported by 55% or organizations) and triggered cascades based on changes in relationship (reported by only 18% of organizations) are two that are necessary for the email categories that perform best (see Figure 6.4). But, compared to the practice of general segmentation, reported by 81% of organizations, these email practices are not as common.

Figure 6.1
Percentage of Organizations Routinely Conducting Specified Email Practices, All Organizations

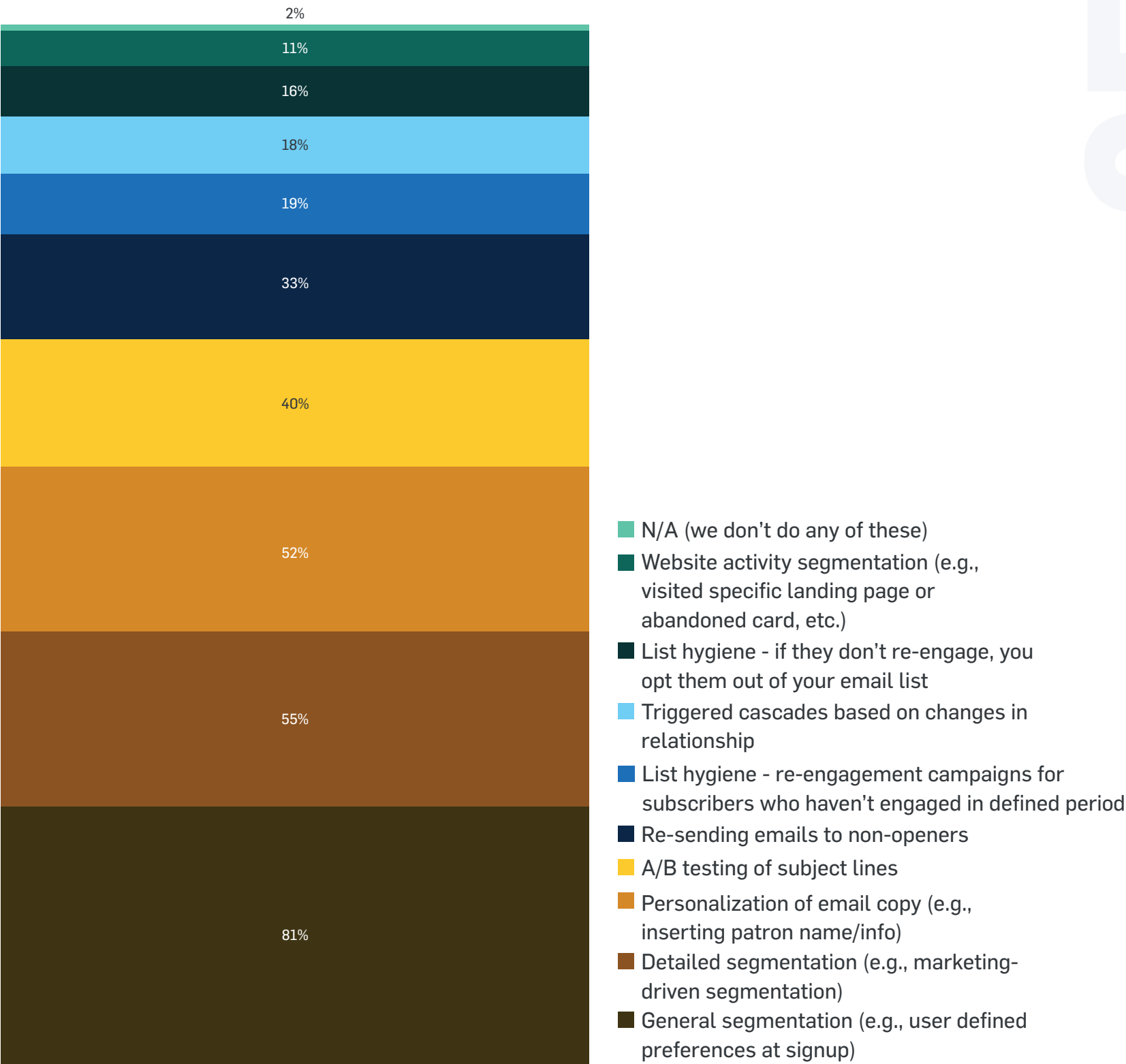
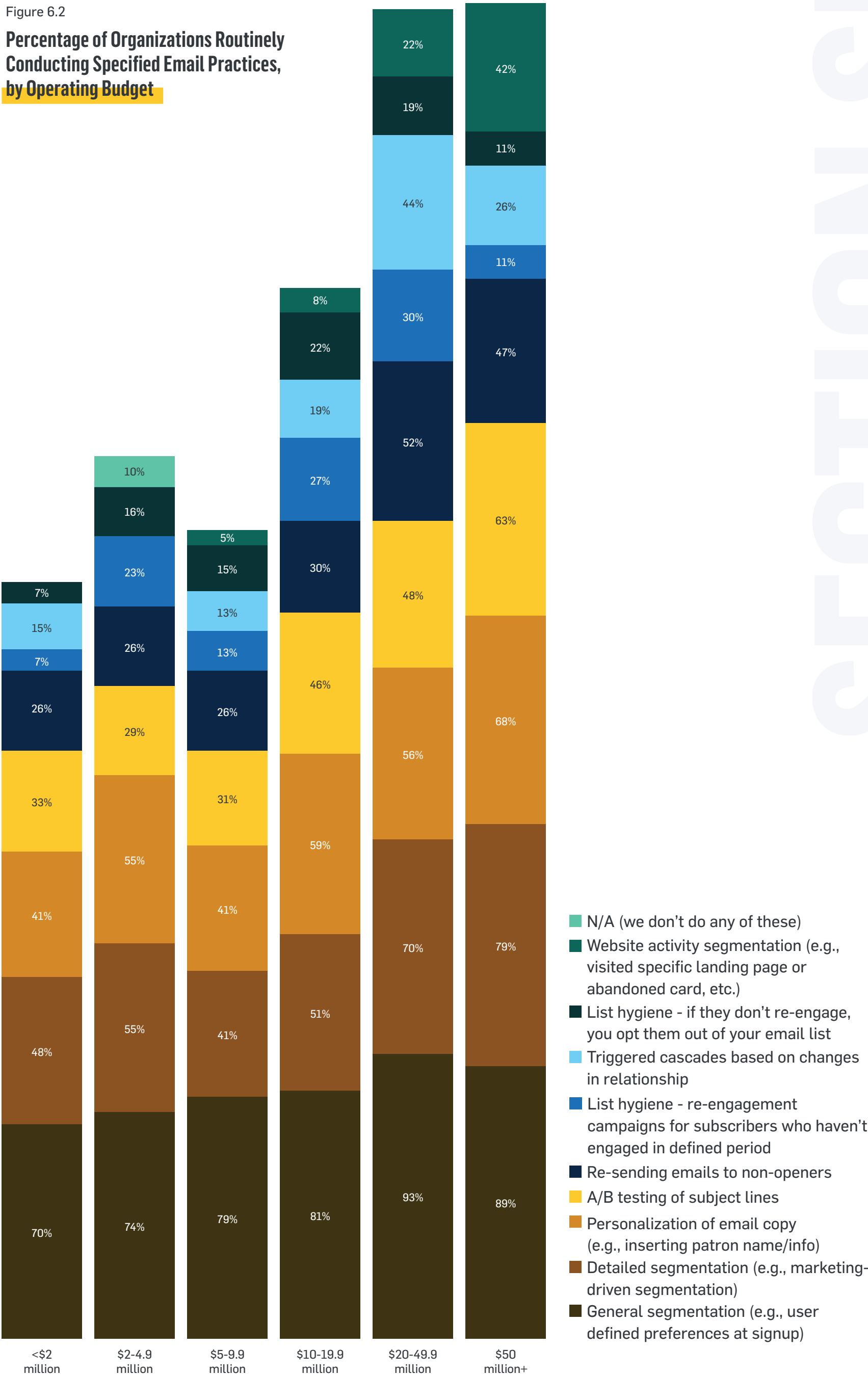


Figure 6.2

Percentage of Organizations Routinely Conducting Specified Email Practices, by Operating Budget



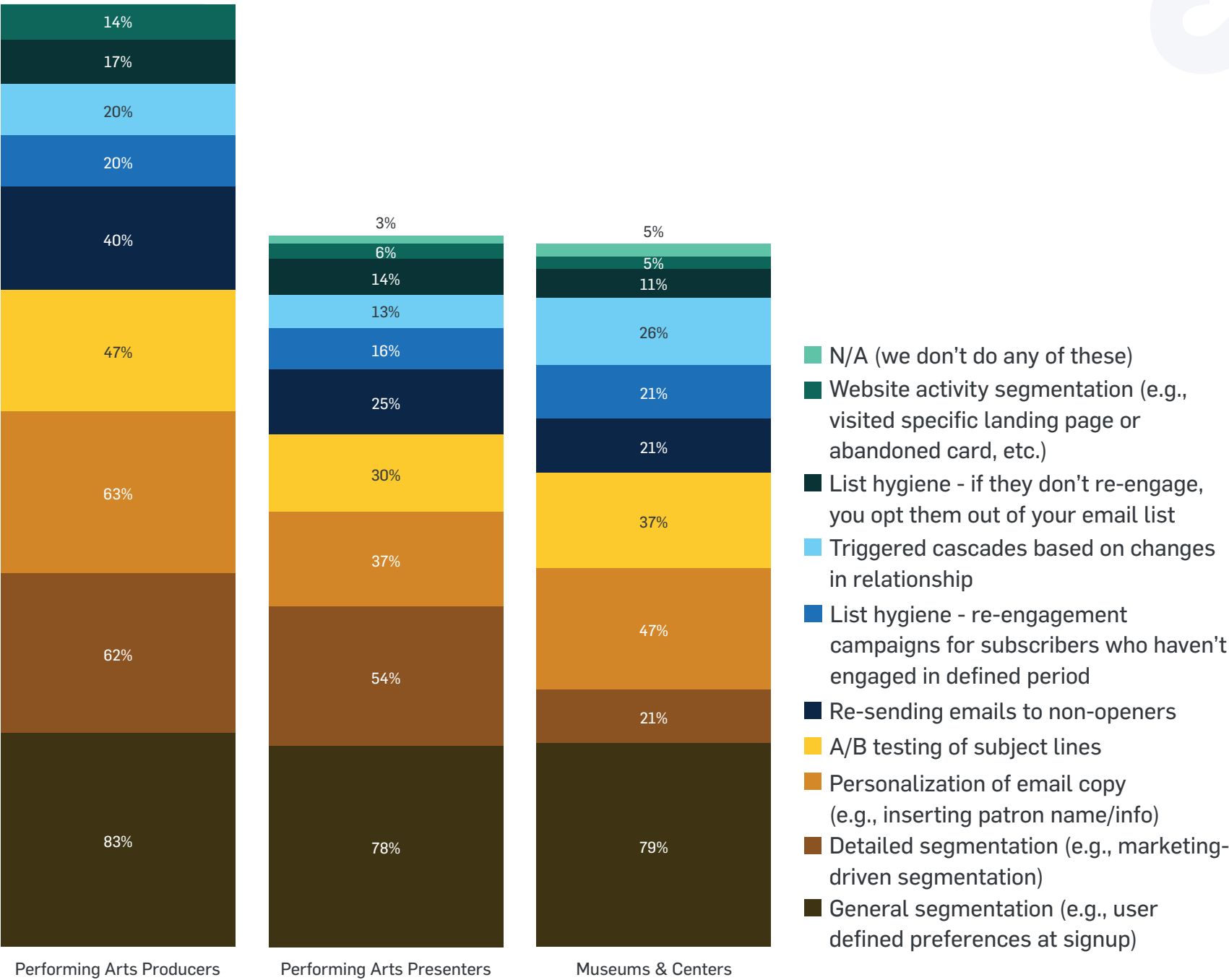
Variations emerge when we look by organization type, with a greater proportion of Performing Arts Producers reporting the use of most practices compared to the other categories. This may be due to the nature of different organization types- most Performing Arts Producers have access to all points of the patron journey and manage relationships over time, whereas Presenters often don't have full access to a venue's database. Museums often face a challenge in collecting email leads at the point of sale, particularly when the majority of their ticketing occurs on site and there's limited incentive for patrons to share their information.

Connecting the Data

Thinking about strategies to ensure effective lead collection and then how to use email to deliver tailored email content to patrons is worth the effort- according to research from the Content Marketing Institute, email is the most effective channel for achieving organizational objectives.⁴⁴



Figure 6.3
Percentage of Organizations Routinely Conducting Specified Email Practices, by Organization Type



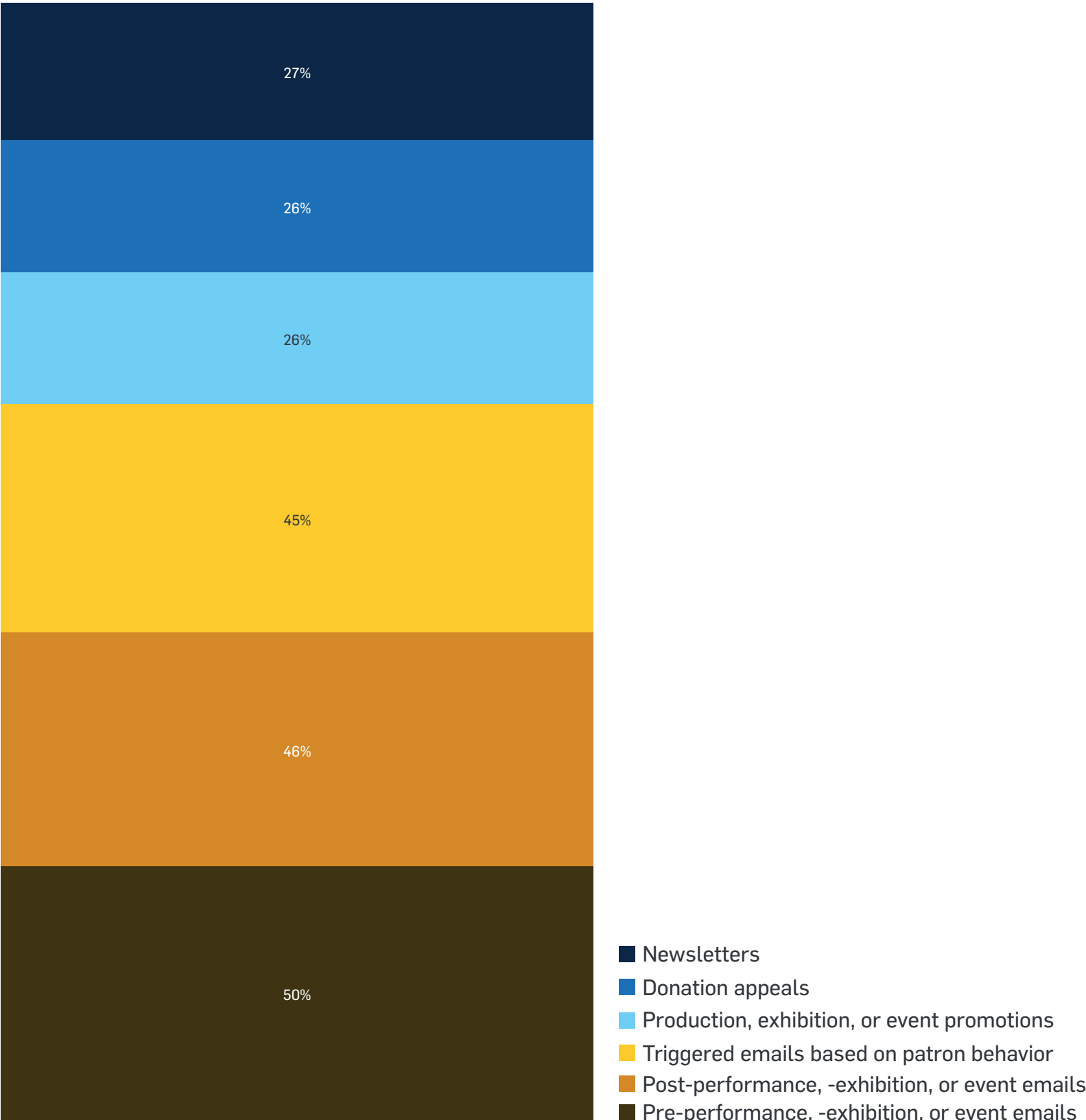
Not surprisingly, the three email types that are most tailored to recipients notably outperformed more general email types. They are (1) pre-performance, exhibition, or event emails; (2) post-performance, exhibition, or event emails; and (3) triggered emails based on patron behavior.

CI Insight

The maintenance and use of your email lists is perhaps the most cost-effective way to engage and retain your patrons, and this data clearly supports the idea that patrons engage best with highly segmented and tailored emails.



Figure 6.4
Average Open Rates by Email Type,
All Organizations



Facebook average daily organic reach, average daily paid reach, and average daily number of post reactions correlate with operating budget size. The differences in reported reach and post reactions were most pronounced in budget categories greater than \$20 million.

Connecting the Data

When assessing where you stand amongst your peers, it’s important to remember that, given the sheer volume of potential content that can be served to any given Facebook user, organizations can no longer rely on organic reach to get in front of their intended audience. Paid reach extends overall reach and boosts the impact of organic reach, which makes Facebook increasingly a “pay to play” platform. This, coupled with a renewed emphasis by Facebook on relevance to users, points towards the need for a rich content marketing strategy for the platform.⁴⁵ As Facebook continues on this trajectory, it will be interesting to see what changes occur in these metrics across our industry in the coming years.



Figure 6.5a

Facebook Average Daily Organic Reach,
by Operating Budget

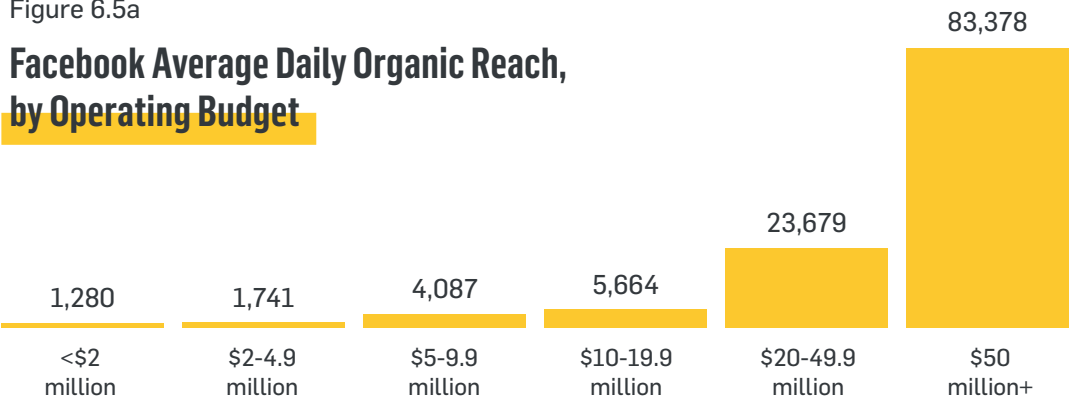


Figure 6.5b

Facebook Average Daily Paid Reach,
by Operating Budget

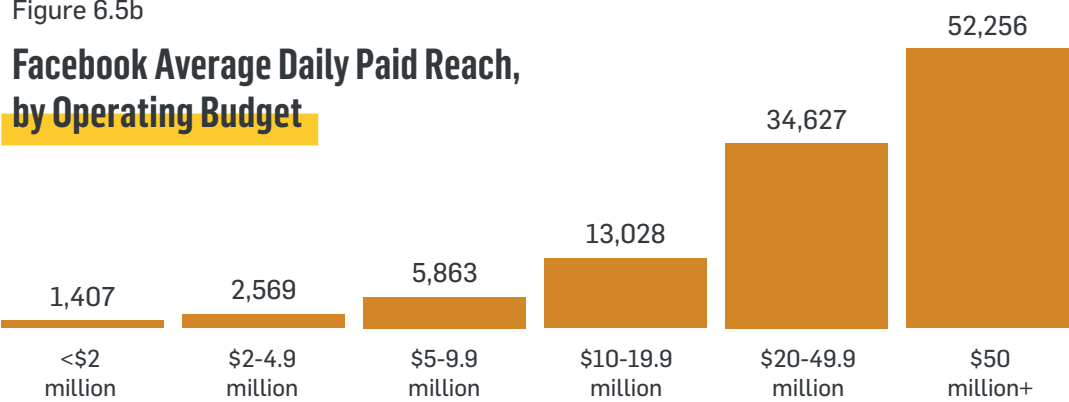
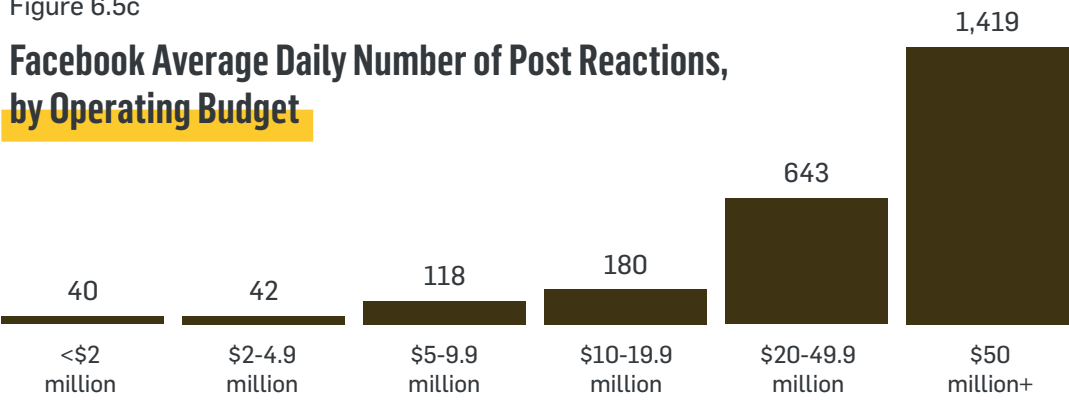


Figure 6.5c

Facebook Average Daily Number of Post Reactions,
by Operating Budget



There are notable differences between organization types that vary by metric. Given the operating budget correlation noted above, organic reach by organization type doesn't fall along the expected lines. If it did, Museums/Centers would lead, followed by Presenters, then Producers; yet, we see that Performing Arts Producers lead, followed by Museums/Centers, then Presenters. Similarly, Performing Arts Producers outpaced Presenters in average daily post reactions.

While we cannot draw direct conclusions based on this data, it does serve as a reminder that the Facebook organic reach algorithm takes myriad content, relevance, and engagement-related factors into consideration. Museums/Centers and Performing Arts Producers may be more successfully cultivating and engaging fans through a long-term, segmented content strategy. And, despite nearly all Presenters allocating paid media to Facebook (see Figure 2.8), these organizations may face obstacles (such as access to creative assets or database lists) that must be overcome to create compelling content and continually engage with their audience bases.

Figure 6.6a
**Facebook Average Daily Organic Reach,
by Organization Type**

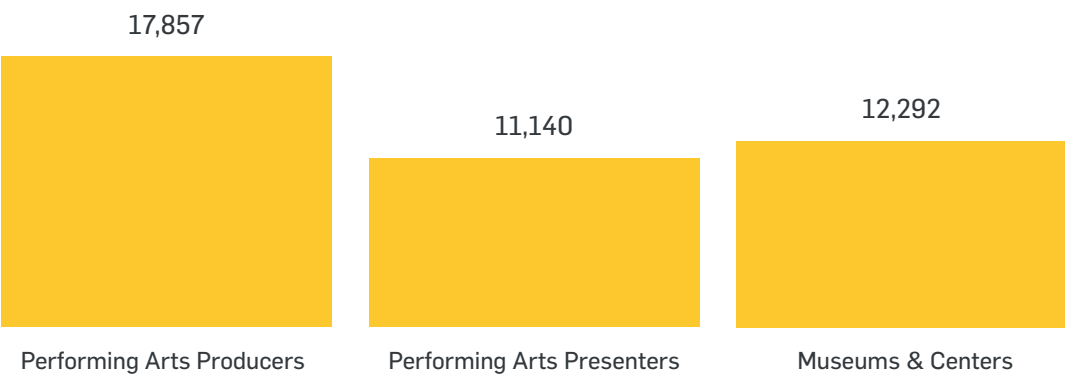


Figure 6.6b
**Facebook Average Daily Paid Reach,
by Organization Type**

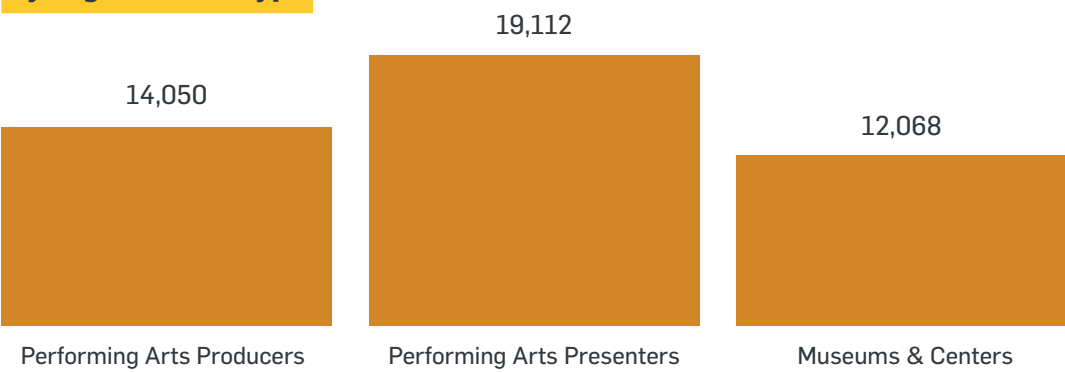
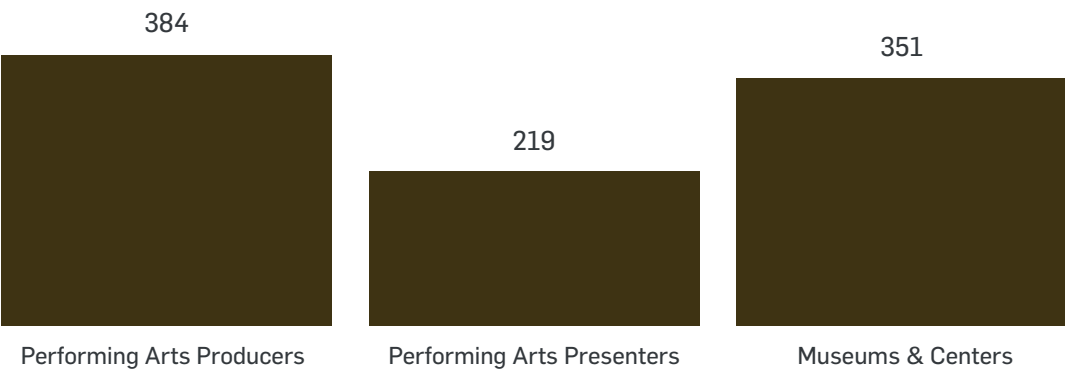


Figure 6.6c
**Facebook Average Daily Number of Post Reactions,
by Organization Type**



In This Section: Content - Production & Resources

All digital marketing channels, from your website to social media, require content to engage patrons and compel them to take action. We sought to take the pulse on all areas related to planning for effective content, including frequency of customization, identifying barriers to creating content, and resourcing for content creation within organizations. In need of some inspiration? No matter your budget, get authentic to your mission and unique identity- according to a trend identified by cmo.com, 84% of consumers believe brands have a responsibility to make the world better.⁴⁶ That sounds to us like an inherent advantage available to all arts and cultural organizations.



Jump to the Data

- Content/Creative Staff Full Time Equivalent (FTE) >
- Professional Development/Training for Content/Creative-Related Skills >
- Frequency of Customizing Content >
- Barriers to Developing Content/Creative >

Key Finding: Content Customization & Production

Looking at how frequently organizations are customizing content for patrons across platforms we see that, in aggregate, the largest proportion of organizations (32%) reported that they customize content only somewhat consistently across most of their digital channels. And, 40% reported a lower frequency and scope than that.

CI Insight

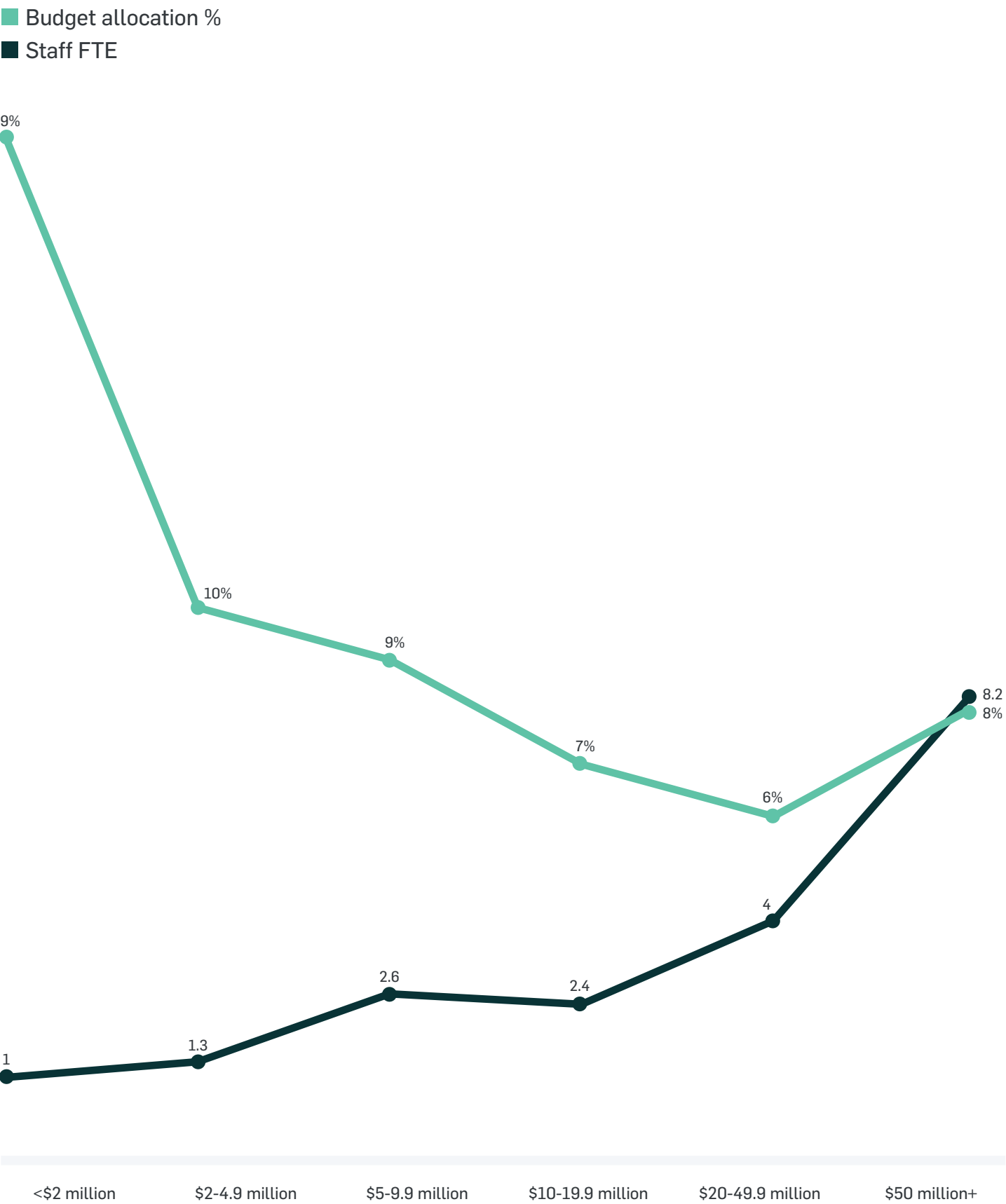
Given that content is at the heart of all we do as digital marketers, this is an area worthy of greater prioritization. By far, the most frequently cited barriers were that staff is spread too thin and there's inadequate budget (reported by 91% and 61% of organizations, respectively). The third and fourth most reported barriers also merit consideration: 36% reported inadequate infrastructure (such as website functionality or technical tools) and 31% reported staff lacking adequate skills/training. While the leading two barriers are present for the majority of organizations, long-term growth in this area will likely entail not only allocating staff time and budget to content, but organizations thinking more broadly with their infrastructure investments and staff training opportunities—particularly if more staff time and budget are made available to attend to this priority.



Section Detail

The reported full time equivalent (FTE) for content/creative staff correlates to operating budget size, and negatively correlates with marketing budget allocation to creative and content (as previously discussed in the marketing budget allocations section). In other words, as reported FTE for content/creative staff increases, proportionately less money is allocated to sourcing support via marketing budgets. Content support must come from somewhere, but rather than outsourcing or paying for support from the marketing budget, it can be inferred that staff is hired for the many elements of content production.

Figure 7.1
Average Staff Full Time Equivalent (FTE) for Digital Marketing Content Creation, by Operating Budget
& Average Percentage of Marketing Budget Allocation to Creative & Content, by Operating Budget



64% of organizations reported that team members completed professional development/training for content/creative. This leaves room for growth across the field: 25-35% of organizations across all budget categories reported that no opportunities were available. Given the importance and demands of content creation and production, this is an area worthy of attention for all.

Figure 7.2

Professional Development & Training for Creative & Content-Related Areas, All Organizations

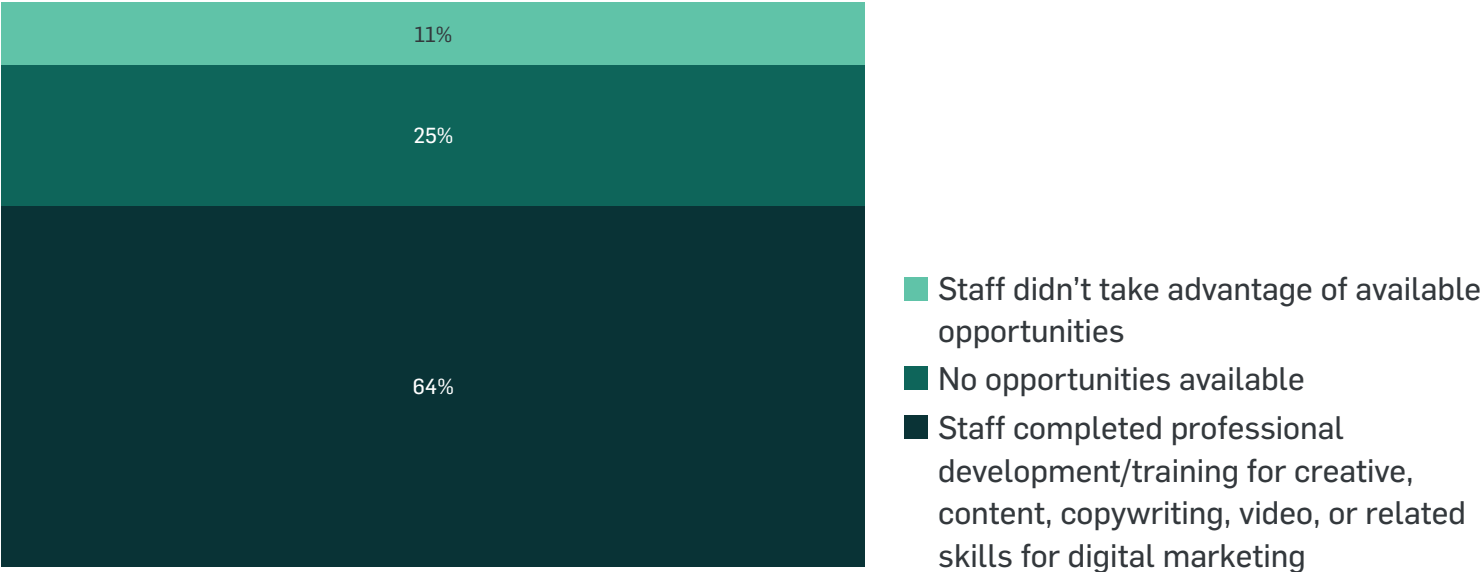
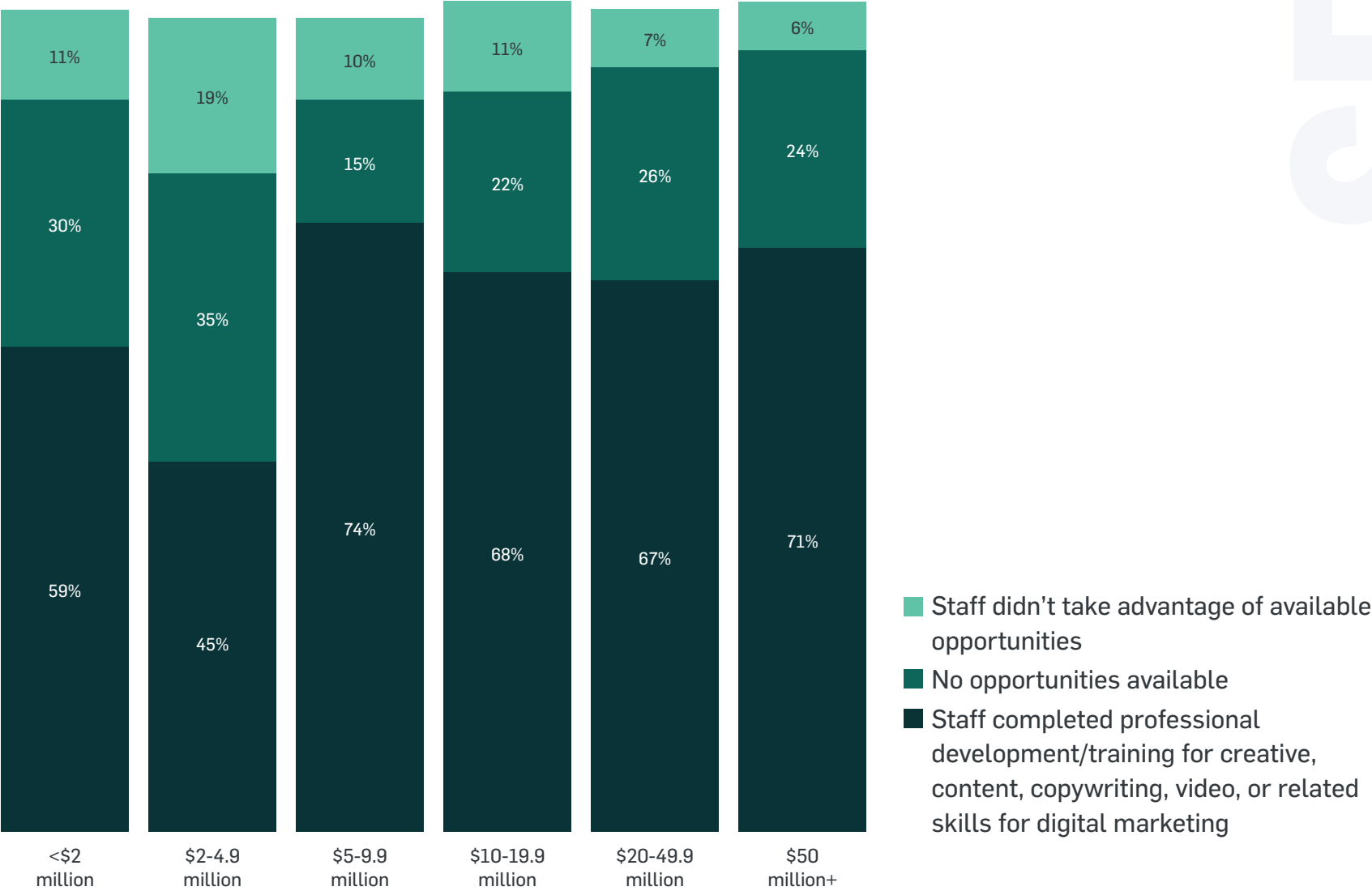


Figure 7.3

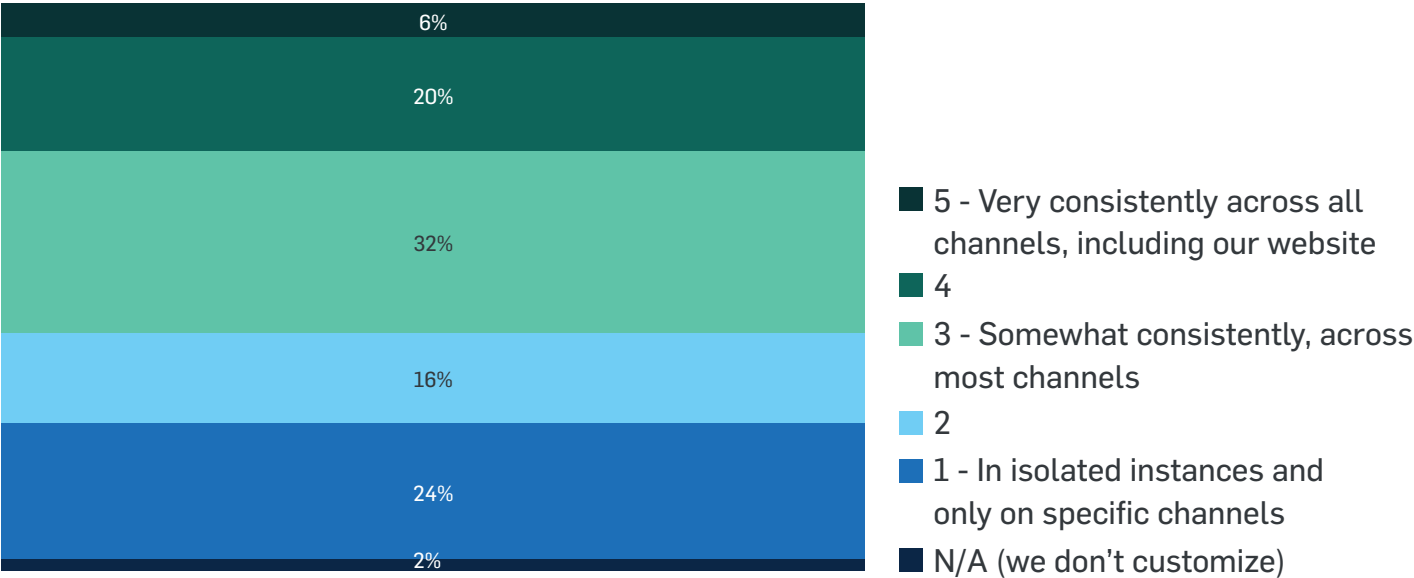
Professional Development & Training for Creative & Content-Related Areas, by Operating Budget



We asked organizations to rank how frequently they customize content for their digital marketing channels on a scale of 1 (indicating only customizing in isolated instances and only on specific channels) to 5 (indicating very consistent customization across all channels, including their website). In aggregate, the most frequently chosen score was 3 (chosen by 32% of organizations), indicating that they customize content somewhat consistently, across most channels. But, 40% reported a score lower than 3.

Figure 7.4

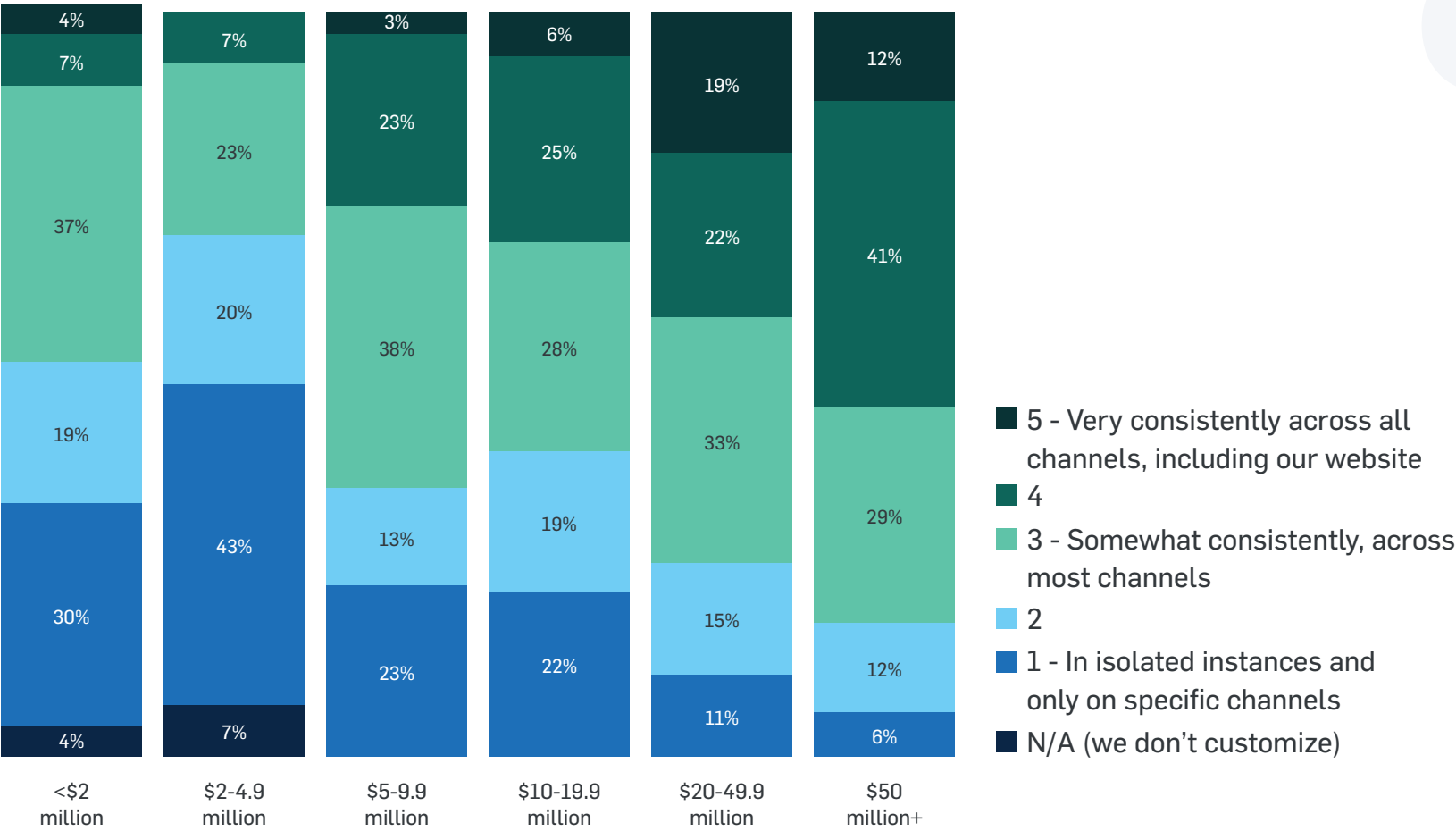
Frequency of Customizing Content for Audience Segments, All Organizations



We found that customization frequency rankings correlate with operating budget size. This suggests a link to full time equivalent (FTE) staff support, which also correlates with operating budget size (see Figure 7.1).

Figure 7.5

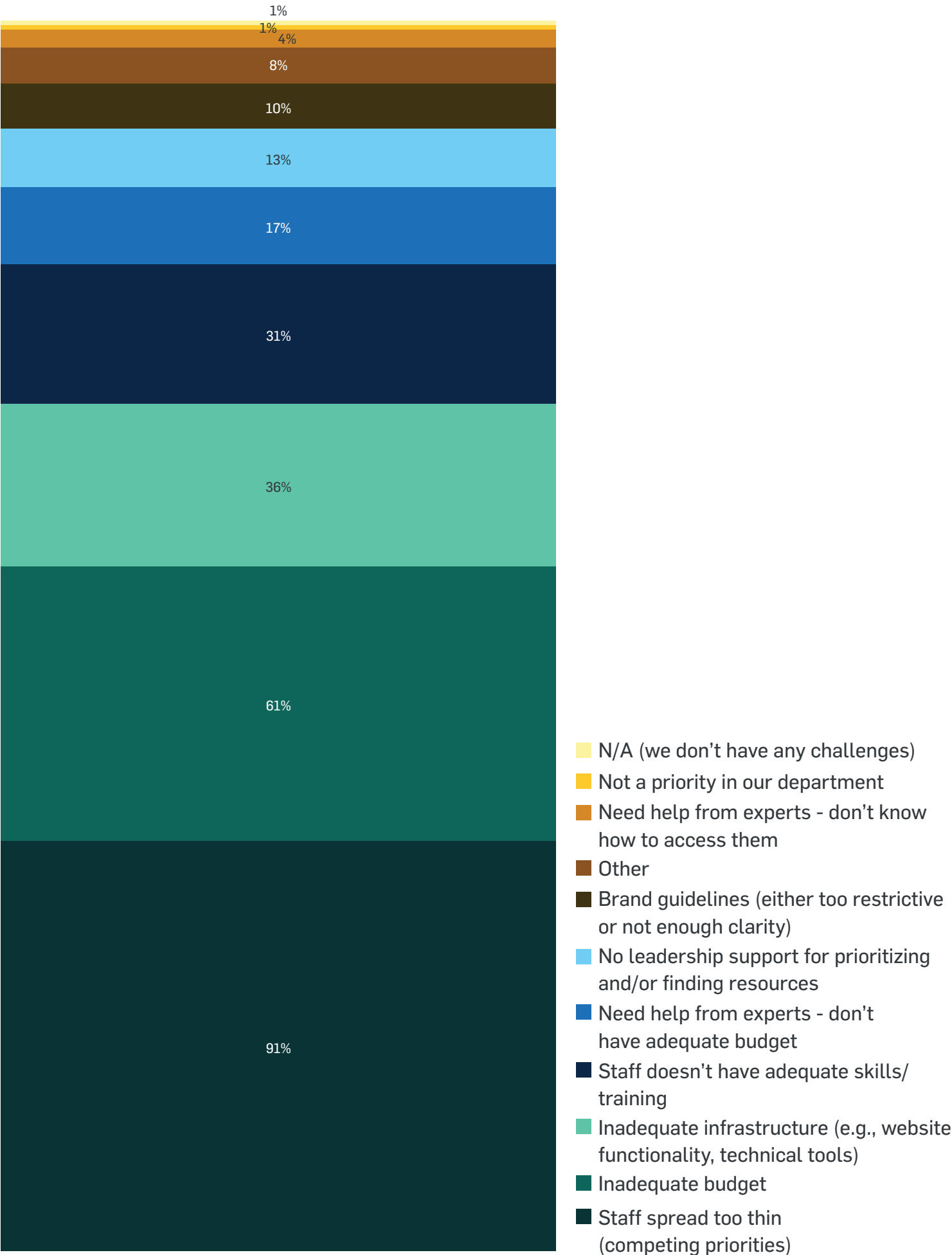
Frequency of Customizing Content for Audience Segments, by Operating Budget



The two most frequently reported barriers to content creation were chosen by the majority of organizations: staff is spread too thin and there's inadequate budget. In particular, staff resources seem to be a ubiquitous challenge for the field. With so many competing priorities, it appears that content development and creation is often placed on the back burner. The third and fourth most reported barriers were chosen by over a third of organizations and concern inadequate infrastructure (such as website functionality or technical tools) and staff lacking adequate skills/training.

Figure 7.6

Most Significant Barriers to Developing Creative & Content (Choose Up to Four), All Organizations



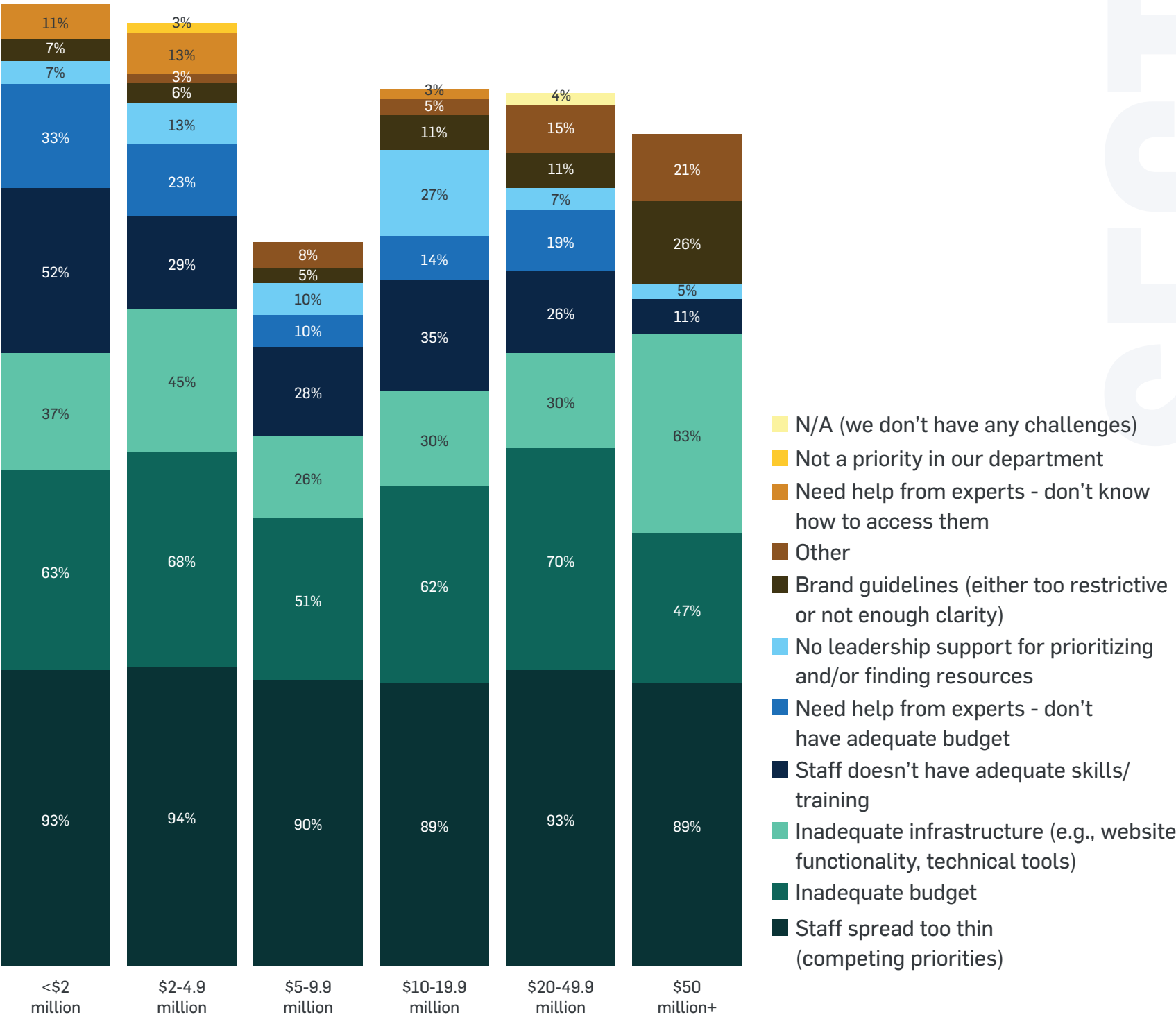
The four most frequently cited barriers identified by organizations in aggregate hold their top spots across operating budget categories (in varying orders) with the exception of the \$50 million+ category. There, barriers pertaining to brand guidelines come in fourth. This points to a challenge related to efforts for, or constraints around, consistency at scale.

CI Insight

The uniformity of these findings suggests that, no matter your budget size, staff time and money are frequently a barrier to content creation. Furthermore, depending on the size of the organization, inadequate infrastructure or staff skills/training can act as a second wall, leaving content hamstrung and directly impacting the ability of organizations to engage and retain patrons.



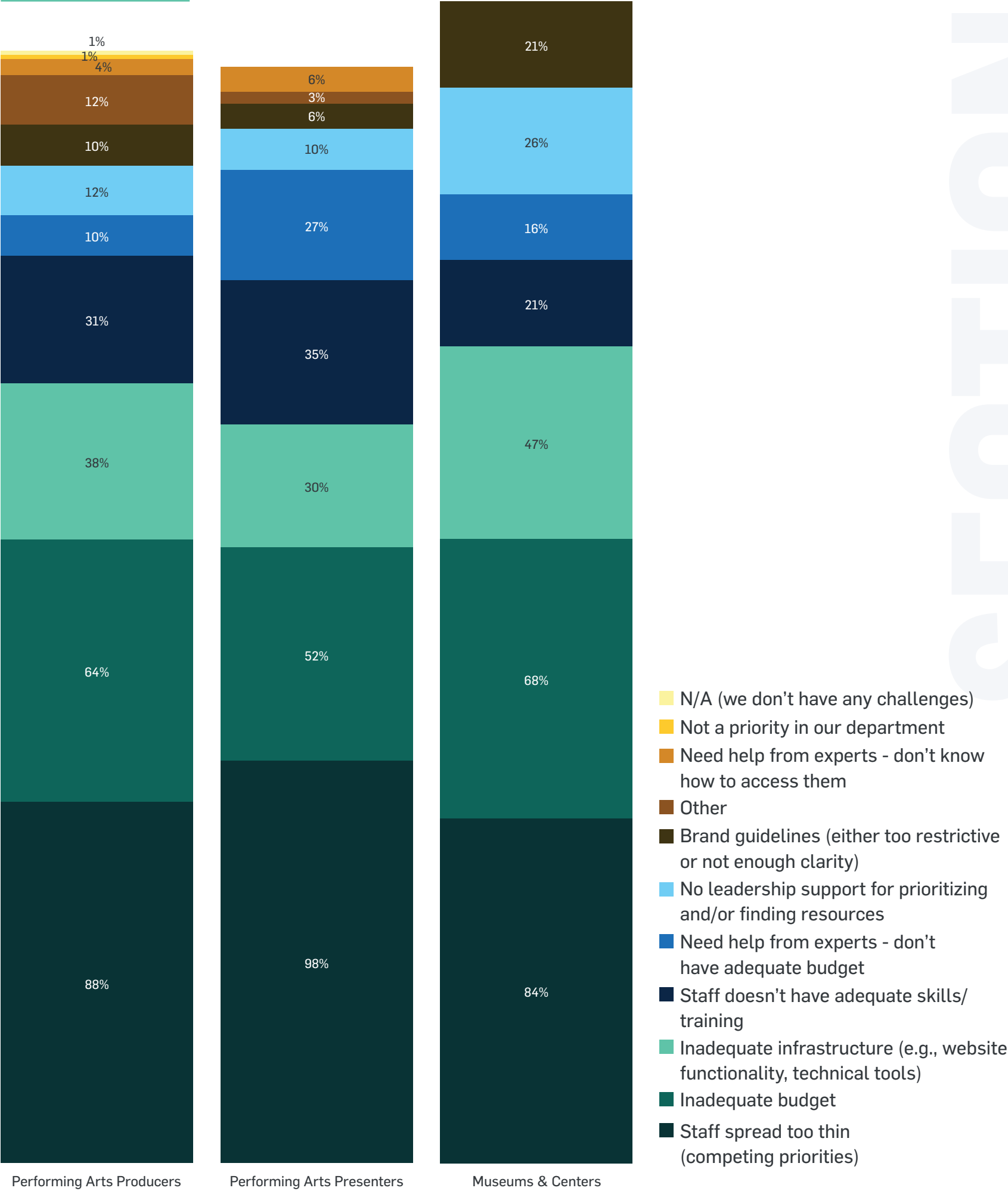
Figure 7.7
Most Significant Barriers to Developing Creative & Content (Choose Up to Four), by Operating Budget



When we look at the data by organization type, differences emerge that lend insight into their particular challenges for content development and creation for digital marketing. For example, lack of leadership support was cited as a barrier more frequently amongst Museums/Centers and there was a near-unanimous response amongst Performing Arts Presenters that staff is spread too thin. Of note, an often-cited “other” barrier was contract/union-related restrictions on assets and was most often voiced by Performing Arts Producers.

Figure 7.8

Most Significant Barriers to Developing Creative & Content (Choose Up to Four), by Organization Type



In This Section: Content - Focus on Video

Close to 50% of respondents to the [Performing Arts Ticket Buyer Media Usage Study](#) indicated that they watch video on Facebook or Instagram a few times a week or more.⁴⁷ Given that nearly all digital channels are conducive to leveraging the power of video, we dedicated a series of questions to this area of content production to begin tracking growth in the field for this important medium. Here's how the field currently stands on video production and related resources.



Jump to the Data

- Video Production Staff Full Time Equivalent (FTE) >
- Number of Marketing Videos Produced >
- Channels for Posting Video Content >
- Frequency of Tailoring Videos to Specific Channels >
- Frequency of Tailoring Videos to Specific Audiences >

Key Finding: Video Production

The number of videos created by organizations suggests that the field has taken note of the power of the medium. Between 81-100% of organizations with budgets greater than \$5 million created ten or more videos per year. Reports of video creation increase steadily across budget sizes, with a notable jump for those with budgets greater than \$10 million: between 44-89% of those organizations reported creating more than 30 videos per year. Video creation was most sparse for smaller organizations: 45-54% of organizations with operating budgets less than \$5 million created fewer than ten videos per year.

CI Insight

When it comes to video, the arts are the envy of most industries- we have an embarrassment of riches in terms of compelling content at our disposal. More and more, video is a key form of communication with patrons- according to Forbes, 90% of customers report that product videos help them make purchasing decisions and 64% are more likely to buy a product online after watching a video about it. Marketers in the broader field are responding, with 87% using video content in their digital marketing strategy and dedicating 35% of online ad spending to video.⁴⁸ Videos don't have to be professionally produced- empower staff to get creative with the tools on hand and open up your world to your patrons.

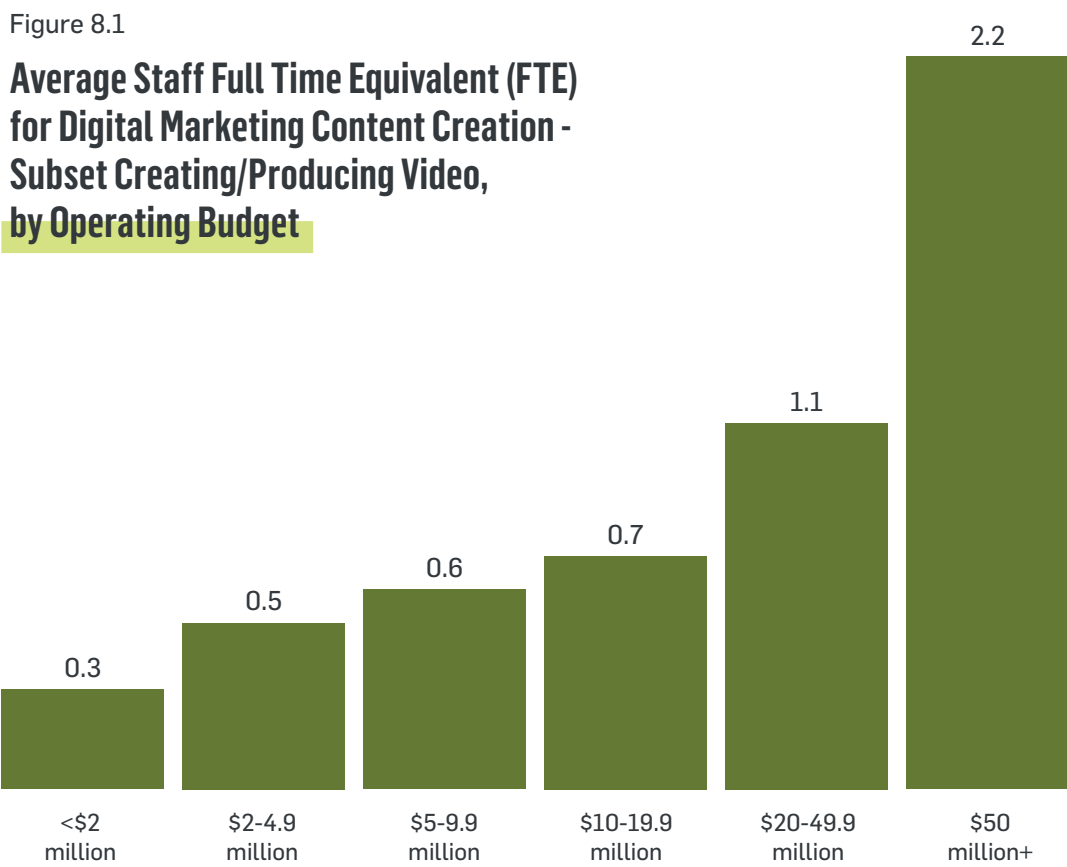


Section Detail

Not surprisingly, the same correlation seen between operating budget size and reported creative/content staff full time equivalent (FTE) holds when looking at the staff FTE for creating/producing video.

Figure 8.1

Average Staff Full Time Equivalent (FTE) for Digital Marketing Content Creation - Subset Creating/Producing Video, by Operating Budget



Given that staffing relationship, it follows that reported video production numbers also correlate with operating budget size.

Figure 8.2a

Average Number of Marketing Videos Created, by Operating Budget

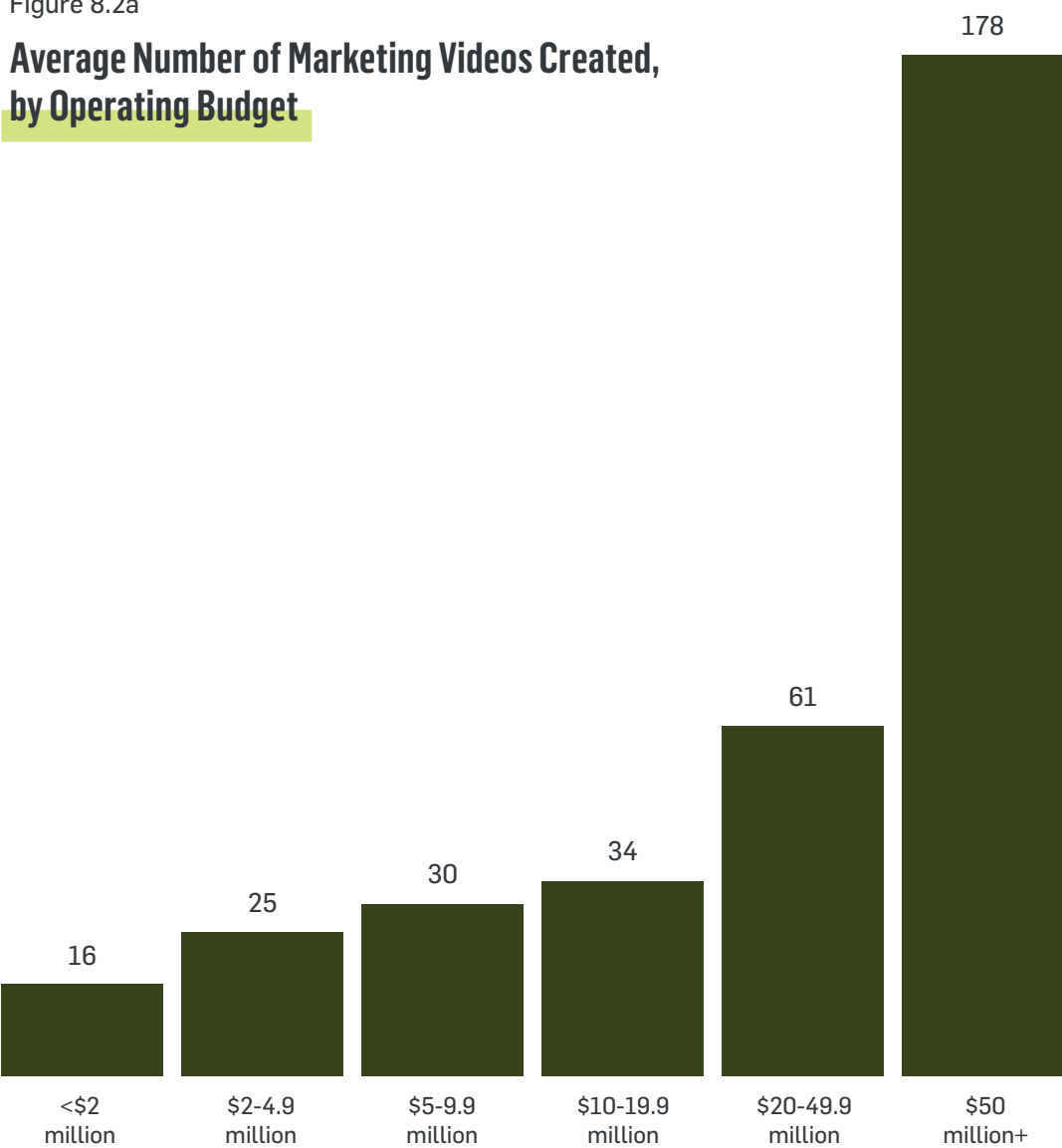
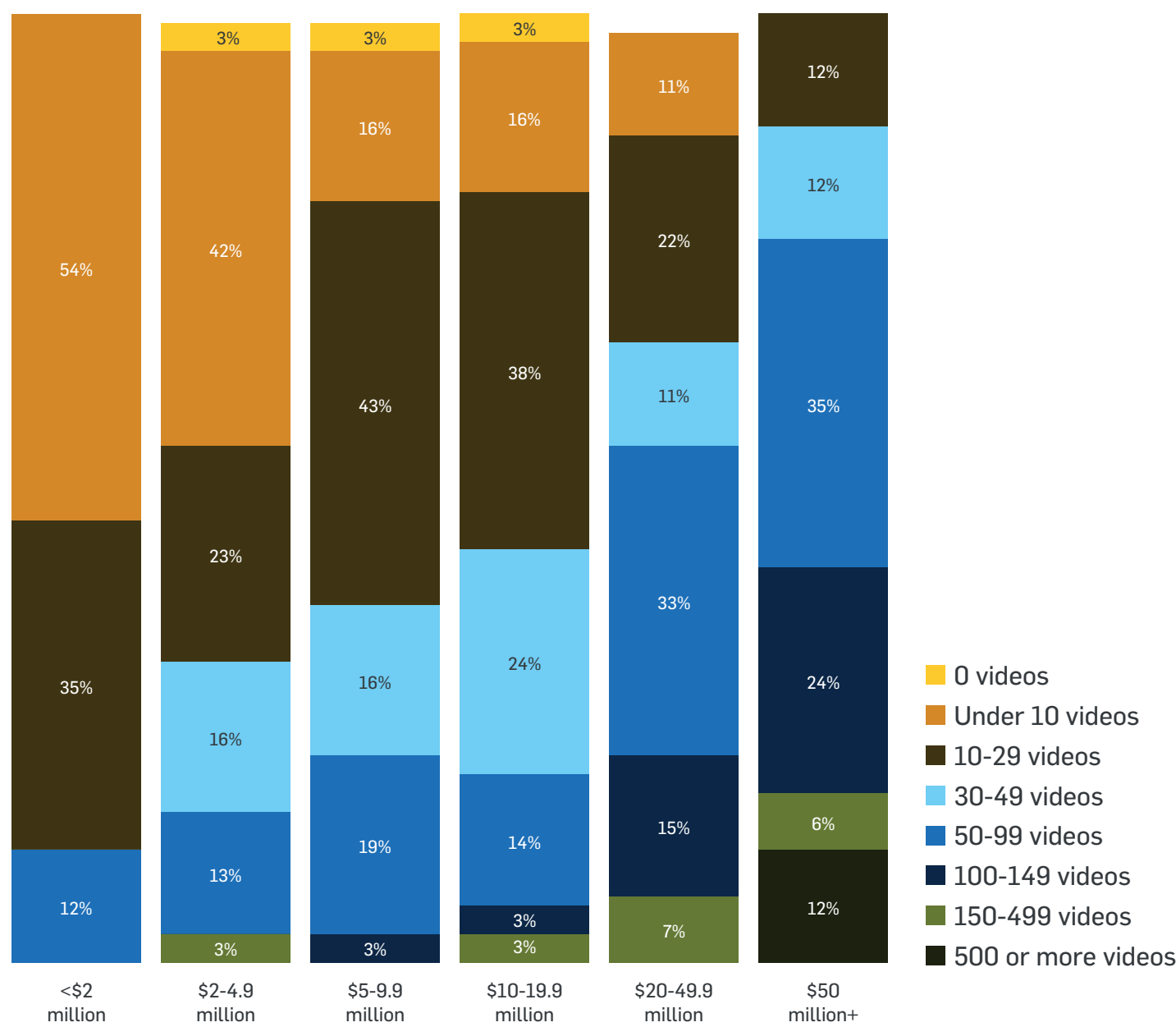


Figure 8.2b

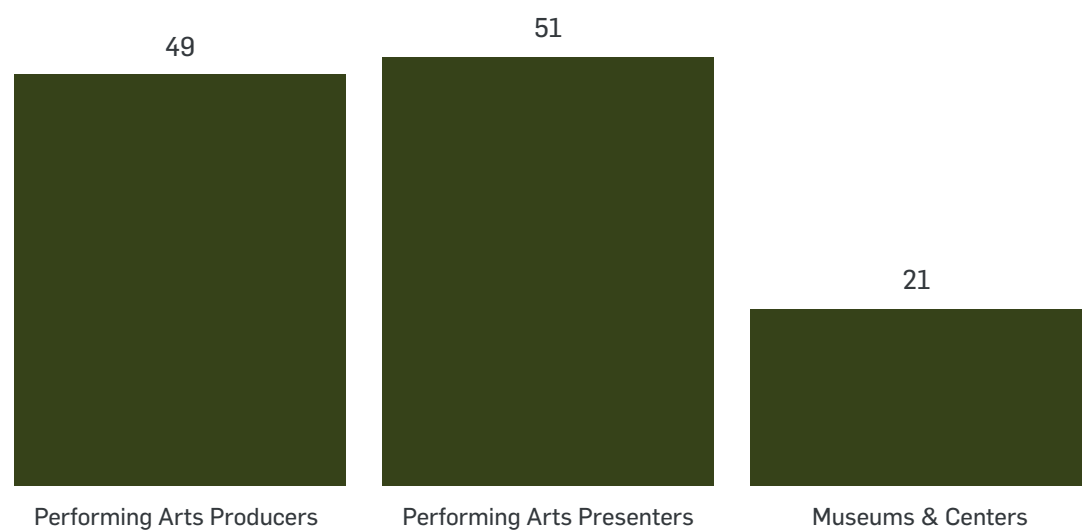
Percentage of Organizations Producing Marketing Videos (in Number Ranges of Videos Produced), by Operating Budget



Interestingly, you see a stark contrast between the number of videos produced for digital marketing by Performing Arts organizations and Museums/Centers. This doesn't trend with what we know about underlying operating budgets and suggests a particular area for growth for Museums/Centers.

Figure 8.3

Average Number of Marketing Videos Created, by Organization Type



The same four channels for posting videos that were most frequently reported across all organizations were also the most frequently reported when the data is cut by operating budget categories. The proportion of each category that reported they post videos on Facebook is remarkably consistent (only ranging between 93-100% across budget categories). After that, there's greater variation in the reported use based on budget size.

Figure 8.4

Percentage of Organizations Posting Videos to Specified Media Channels, All Organizations

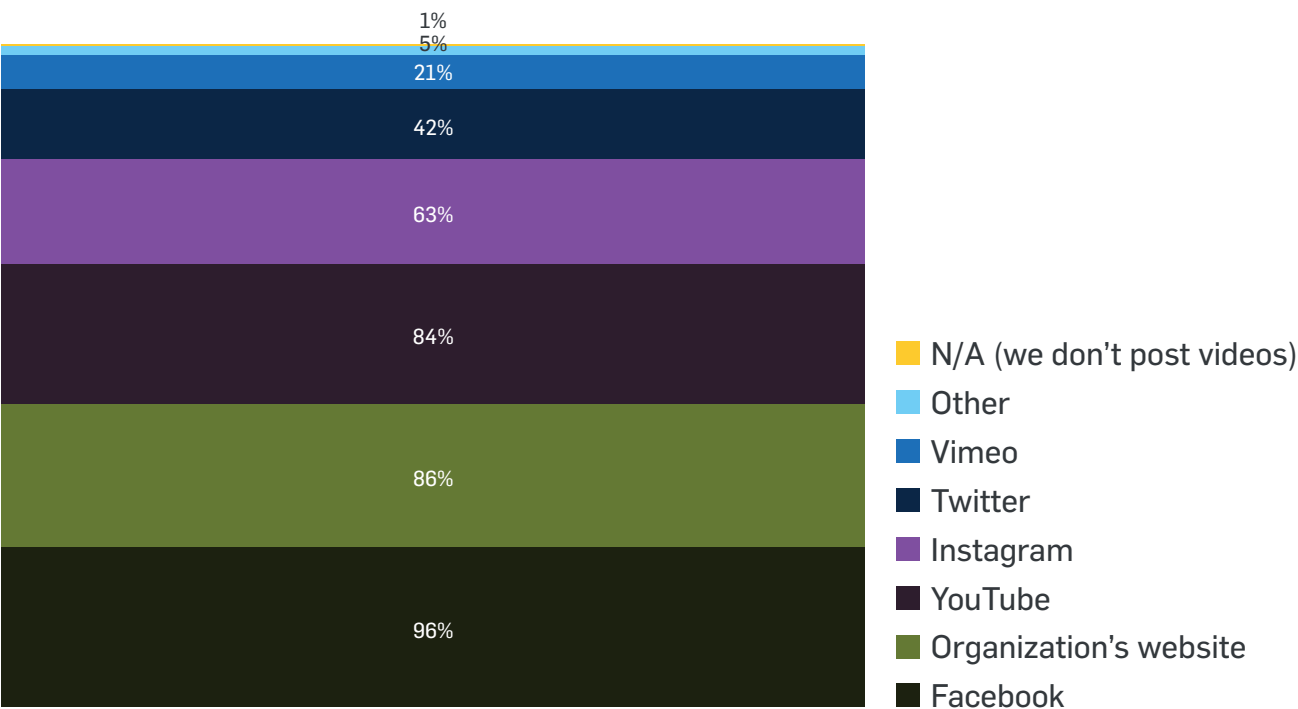
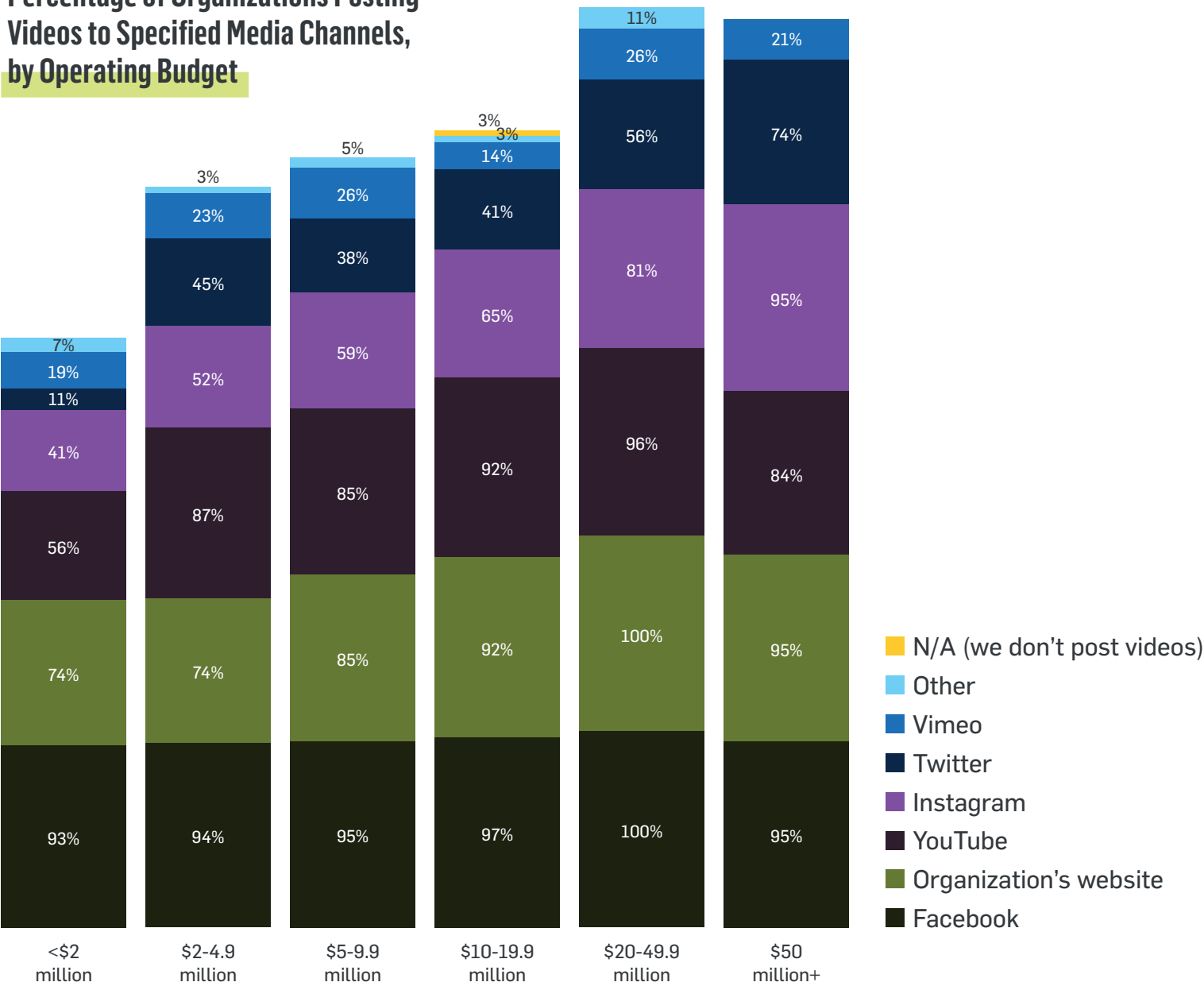


Figure 8.5

Percentage of Organizations Posting Videos to Specified Media Channels, by Operating Budget



There's a general correlation between tailoring video length to specific media channels and operating budget category, suggesting once again a staff/resource-driven element.

Figure 8.6

Frequency of Tailoring Video Length to Specific Media Channels, All Organizations

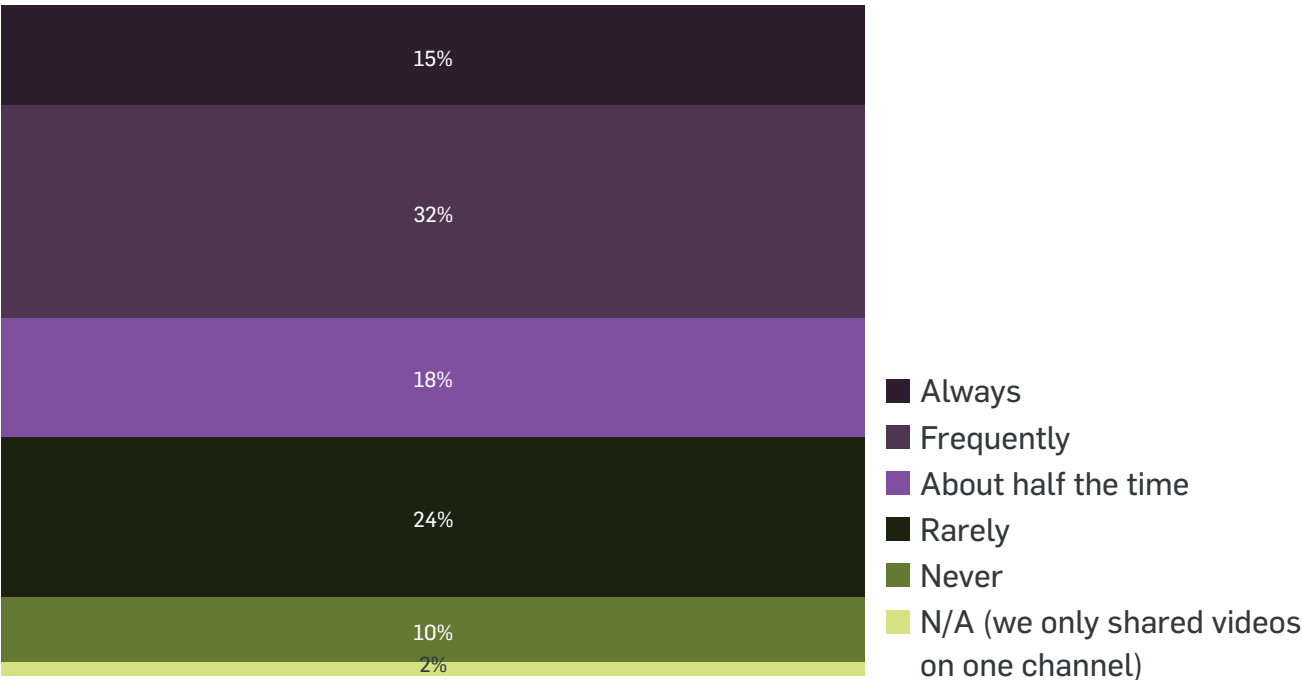
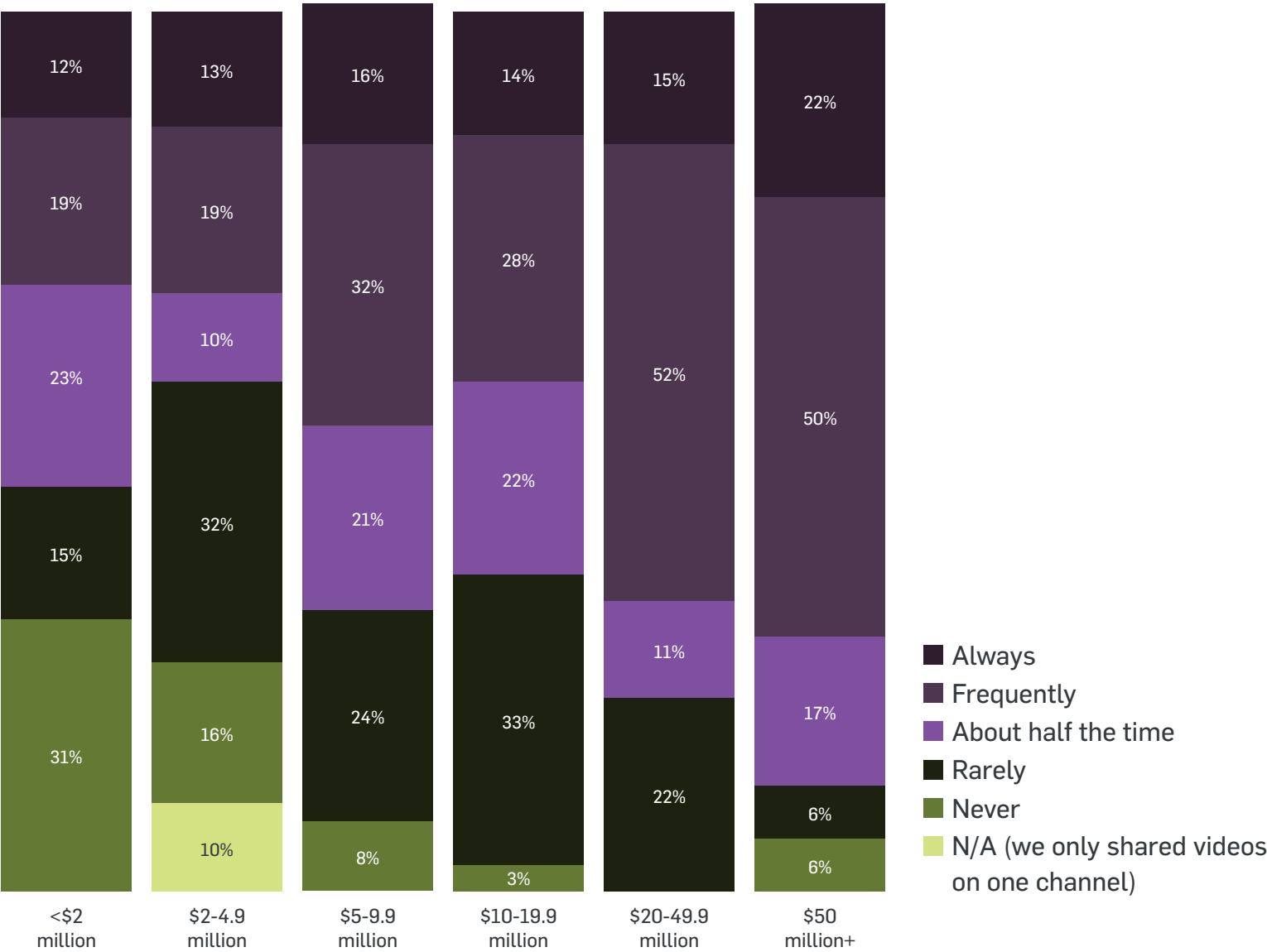


Figure 8.7

Frequency of Tailoring Video Length to Specific Media Channels, by Operating Budget



The same correlation with operating budget noted for tailoring video length appears when looking at customizing video content to audiences within respective platforms. But, in terms of overall scope of reporting, tailoring videos for specific audiences is not yet a common practice. This is not surprising, given the resource investment for this level of customization. But, for those with a robust video production pipeline in place, this is a great goal to amplify the impact of your video.

Figure 8.8

Frequency of Tailoring Videos for Specific Audiences within Given Media Channels, All Organizations

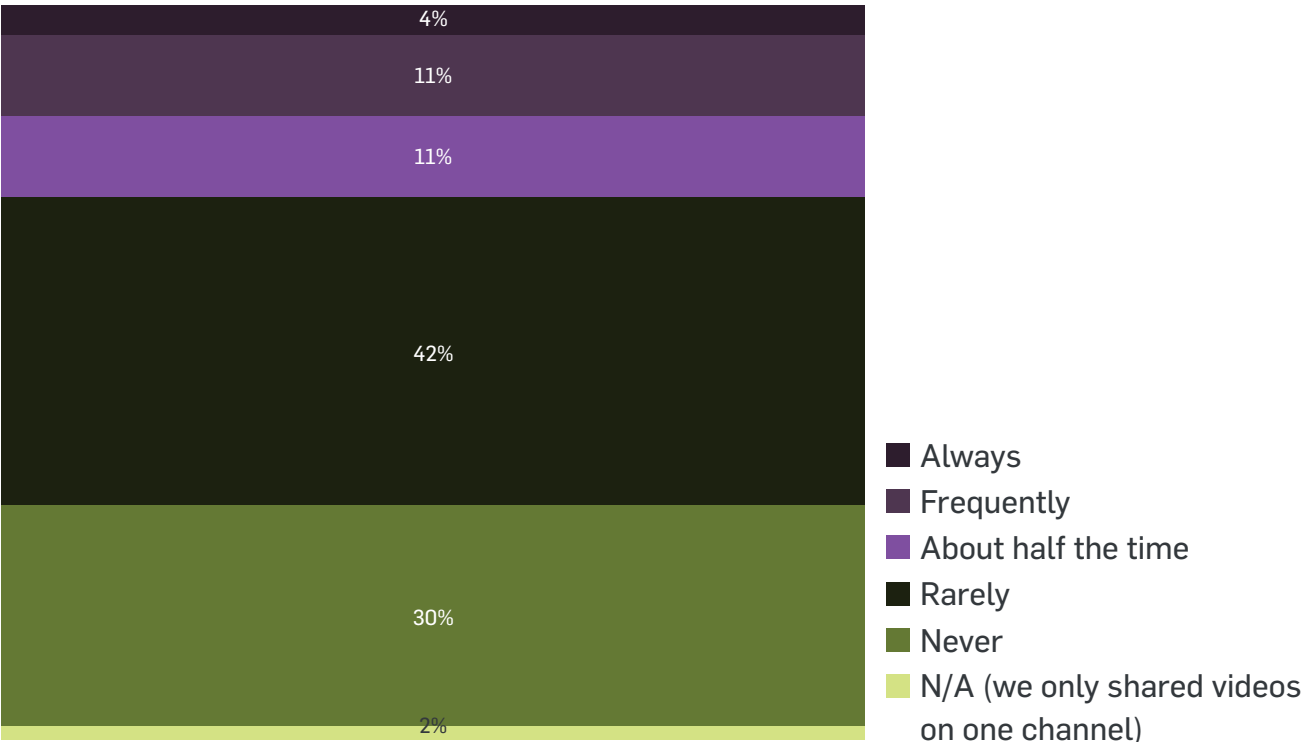
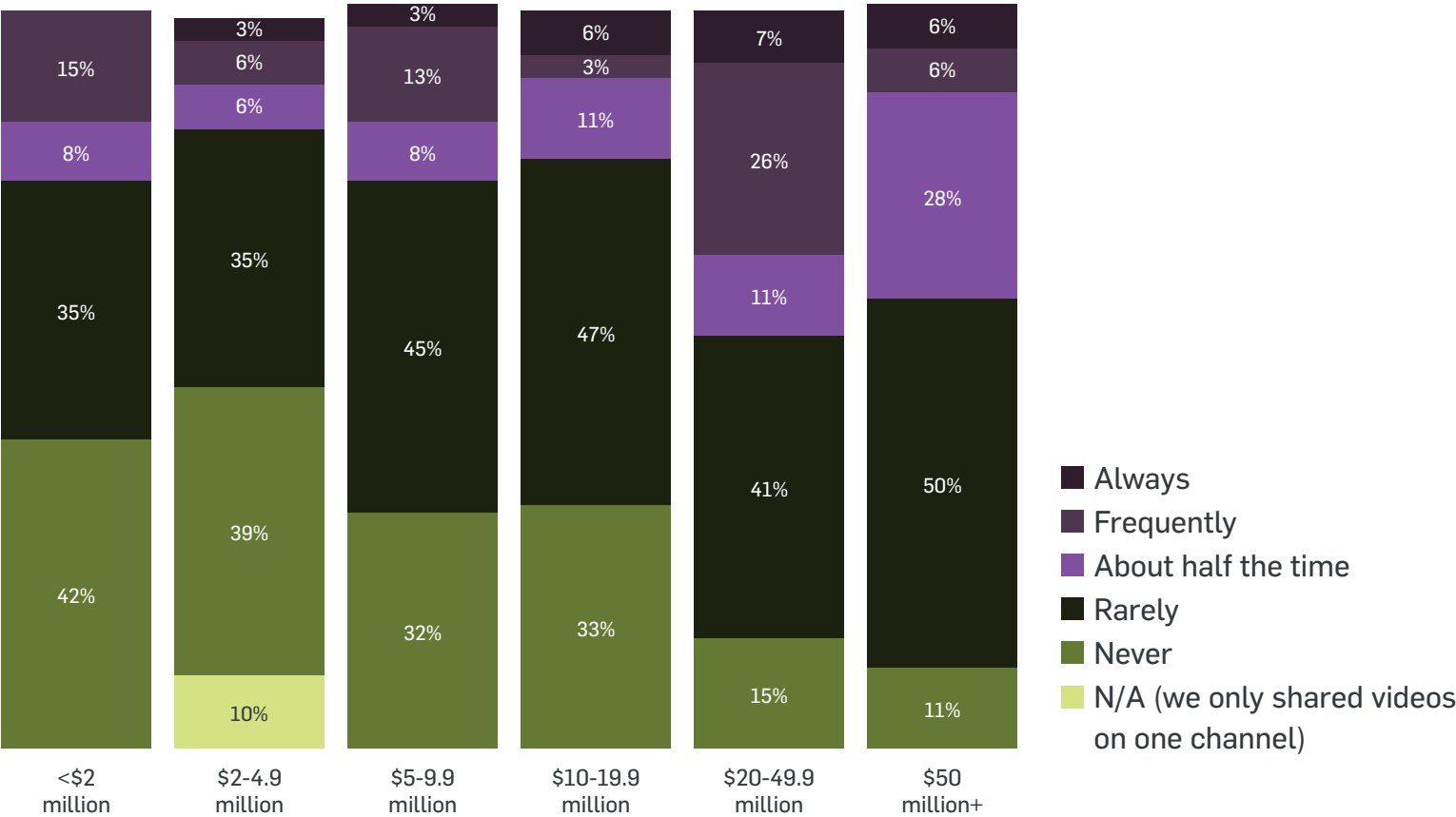


Figure 8.9

Frequency of Tailoring Videos for Specific Audiences within Given Media Channels, by Operating Budget



In This Section: Data & Analysis

According to research from Econsultancy in partnership with Google, “leading marketers,” those business leaders who significantly exceeded their top business goals in 2016, identified two critical requirements for success: support from the top and a clear data and analytics strategy. What’s more, these leading marketers are 1.3 times as likely as their less successful counterparts to say that “being a more data-driven organization is a top goal for their CEO.” They also noted that it wasn’t a top-down push; rather, a data-driven mentality was adopted across the company, with nearly 70% saying “their companies use data to support decision-making at all levels.”⁴⁹ One of the exciting benefits of the digital age is the abundance of data available to those who wish to use it. Data is an input that can benefit decision making at all levels of arts and cultural organizations and, if embraced, can lead to a paradigm shift in how an organization informs its strategy for cultivating and strengthening patron relationships and communicating mission.



Jump to the Data

- Data/Analysis Staff Full Time Equivalent (FTE) >
- Professional Development/Training for Data/Analysis-Related Skills >
- Frequency of Using Data/Analysis for Updating Digital Marketing Strategy >
- Barriers to Accessing Data & Gaining Useful Analysis >

Key Finding: Data Analysis & Use of Data in Adapting Digital Strategy

With knowledge that the majority of respondents identified data analysis and the use of data in digital strategy as a key area for improvement for digital marketing in their organizations (see Figure 1.5), we turn to look more closely at the specific barriers to analyzing and using data. A resounding 80% of organizations reported that staff is spread too thin. Limitations around staff skills and training followed at 48% and difficulty getting data from platforms rounded out the top three, chosen by 41% of organizations. Of note, budget came in at a distant fourth (16%).

CI Insight

With the data that staff and skill-related challenges were reported most frequently, it’s interesting to note that only 57% of organizations reported that team members completed professional development/training for data reporting, analysis or related skills, 26% reported that no opportunities were available in their organizations, and 17% didn’t take advantage of available opportunities. Growth in this area will likely require a leadership-embraced shift in organizational outlook on these critical practices.



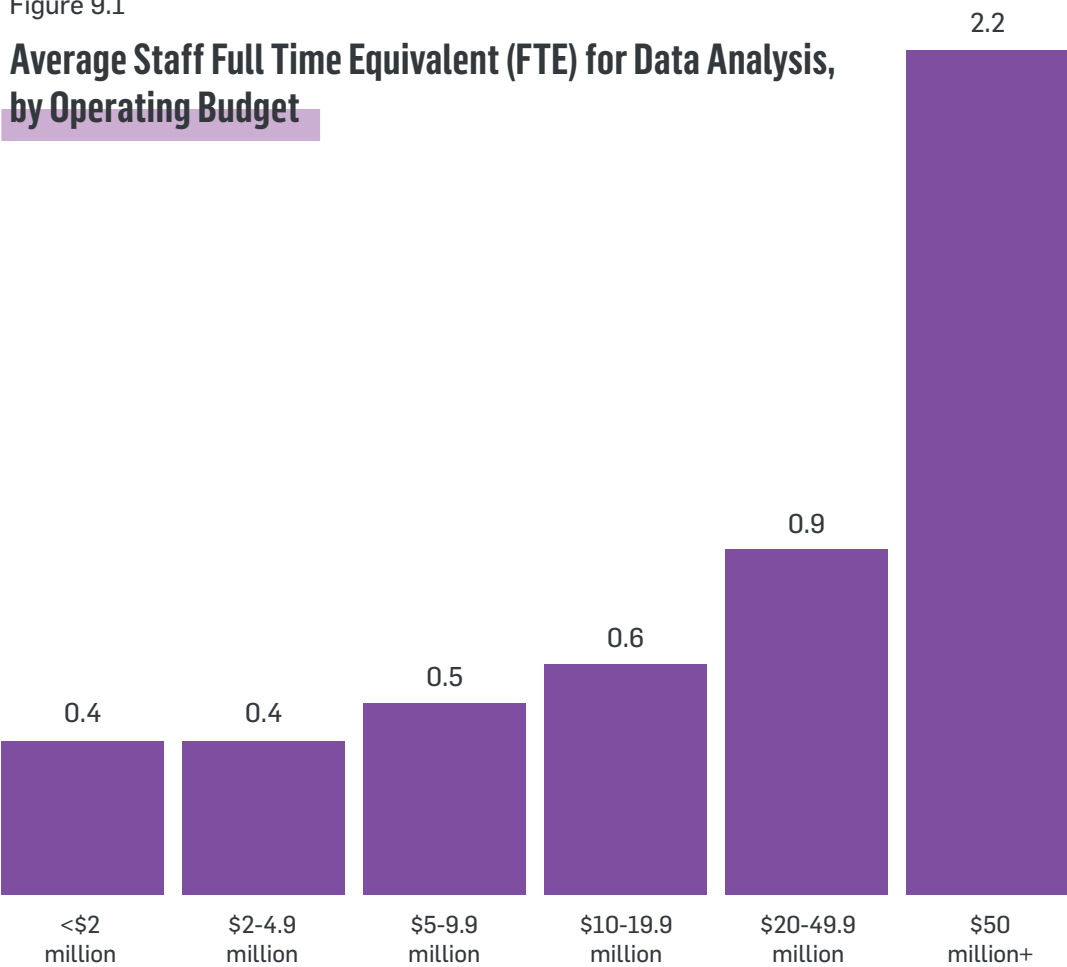
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Section Detail

The reported full time equivalent (FTE) for data/analysis staff is almost completely correlated with operating budget size.

Figure 9.1

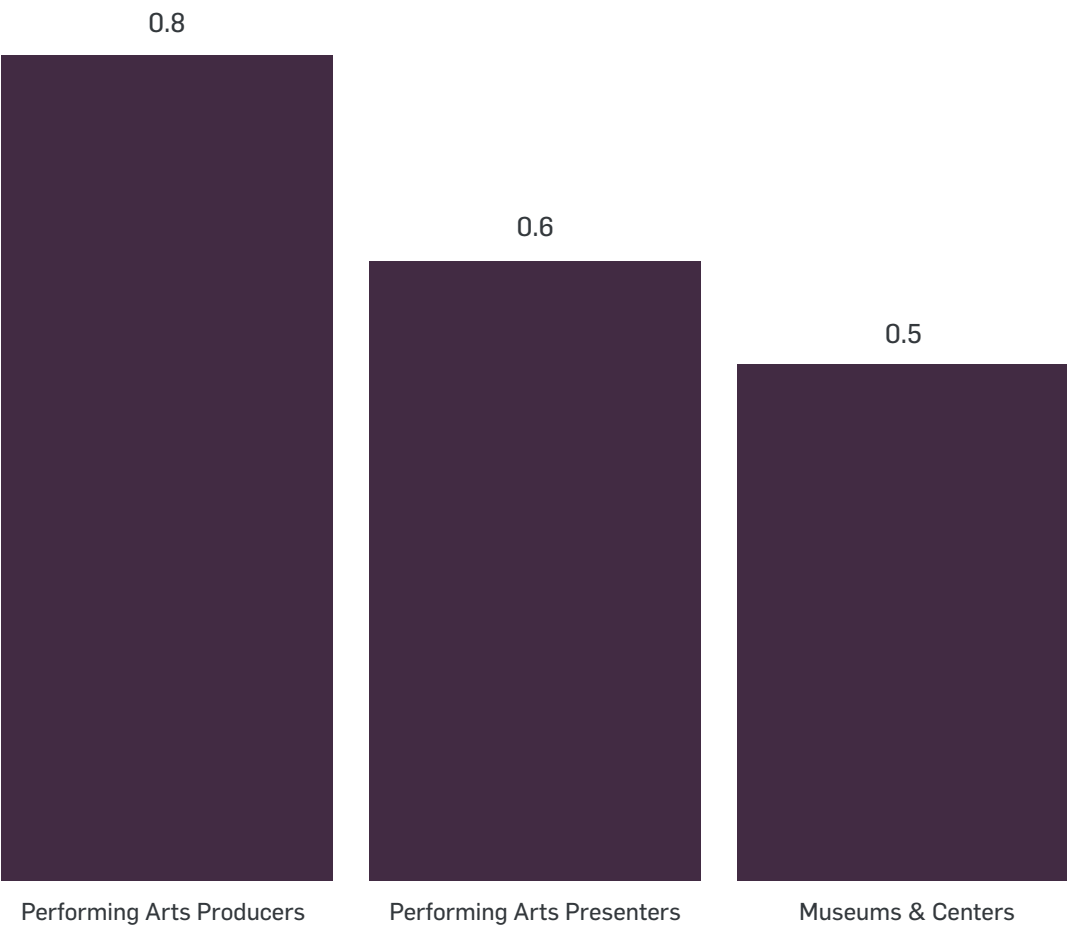
Average Staff Full Time Equivalent (FTE) for Data Analysis, by Operating Budget



Of note, there was a difference across organization types that doesn't trend with what we know about underlying operating budgets and suggests Museums/Centers are lagging in resourcing for data/analysis.

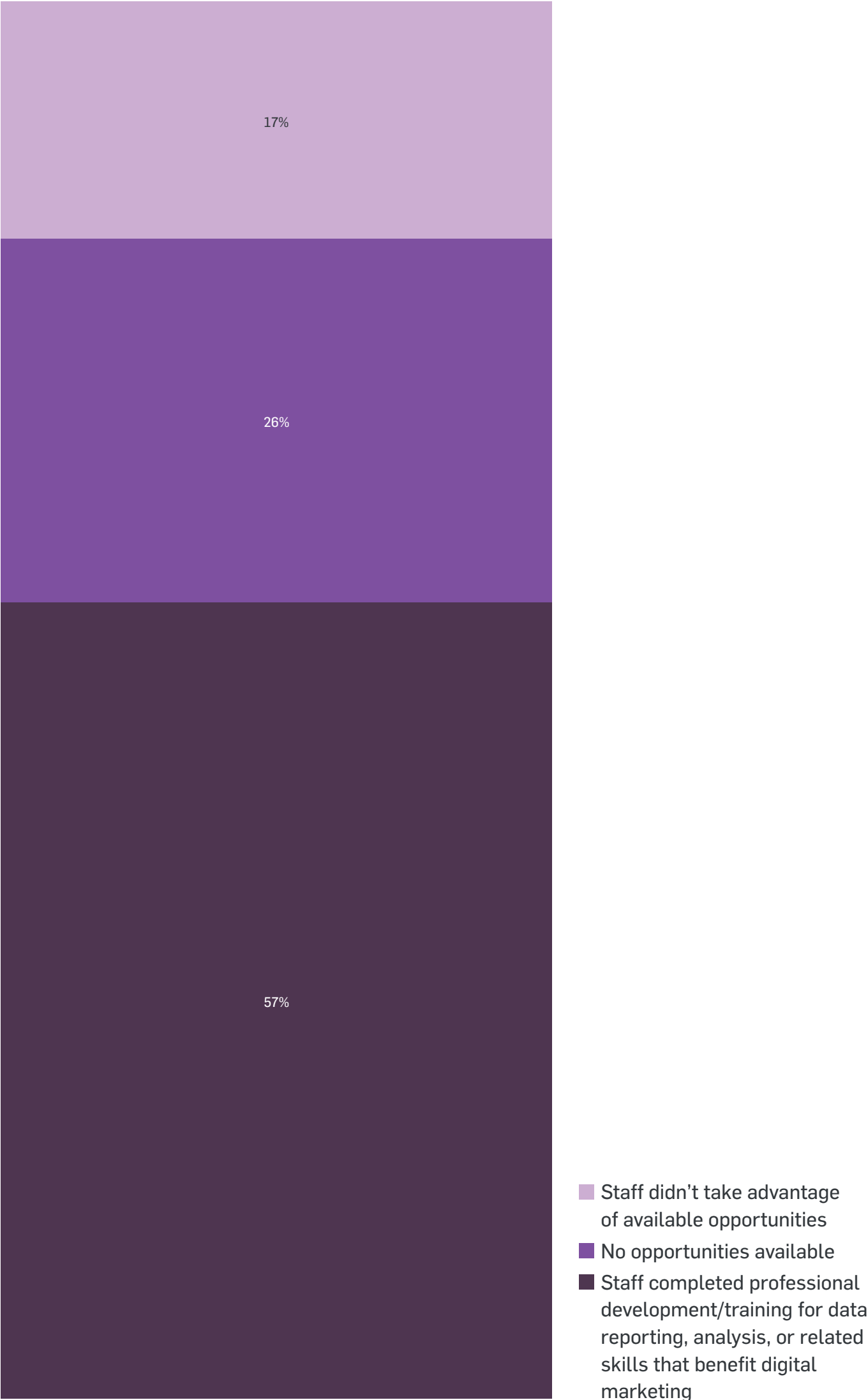
Figure 9.2

Average Staff Full Time Equivalent (FTE) for Data Analysis, by Organization Type



Despite data/analysis being the most frequently identified area for digital marketing improvement, 26% of surveyed organizations reported that no opportunities for professional development were available in their organizations and 17% didn't take advantage of available opportunities.

Figure 9.3
**Professional Development & Training for Data Analysis & Related Skills,
All Organizations**



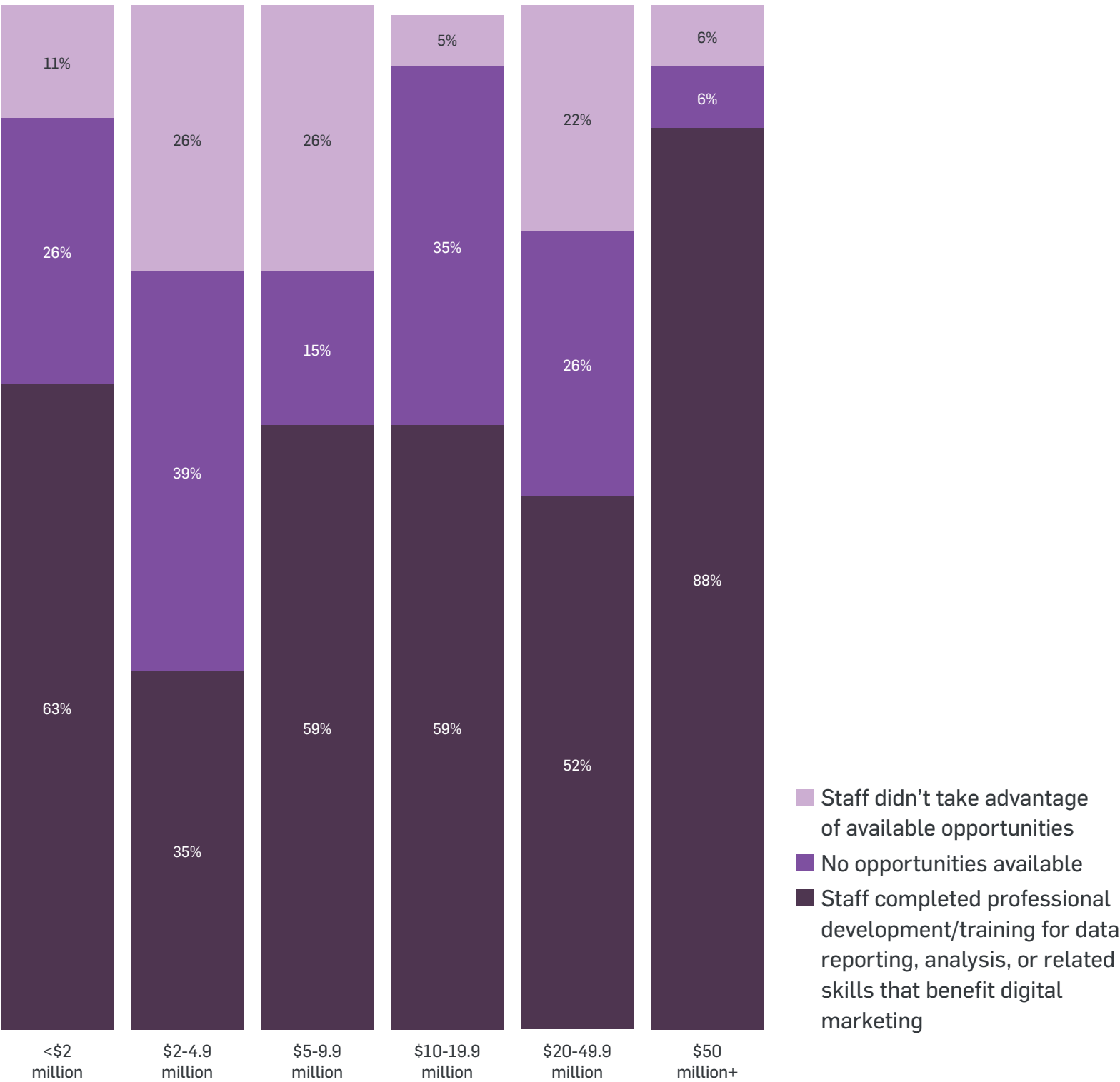
Professional development/training is clearly an area for growth for the field at-large. Supporting this, while different operating budget size categories vary from the overall average, there’s no clear correlation with budget size, though the very largest budget category (\$50 million+) reported significantly more professional development/training.

CI Insight

Professional development and training clearly requires an investment of time and resources away from already heavy workloads. On the other hand, it’s worth considering how creating a culture that prioritizes staff development will get you closer to your goals, particularly given the challenge around data and analysis identified in this study (see Figure 1.4).



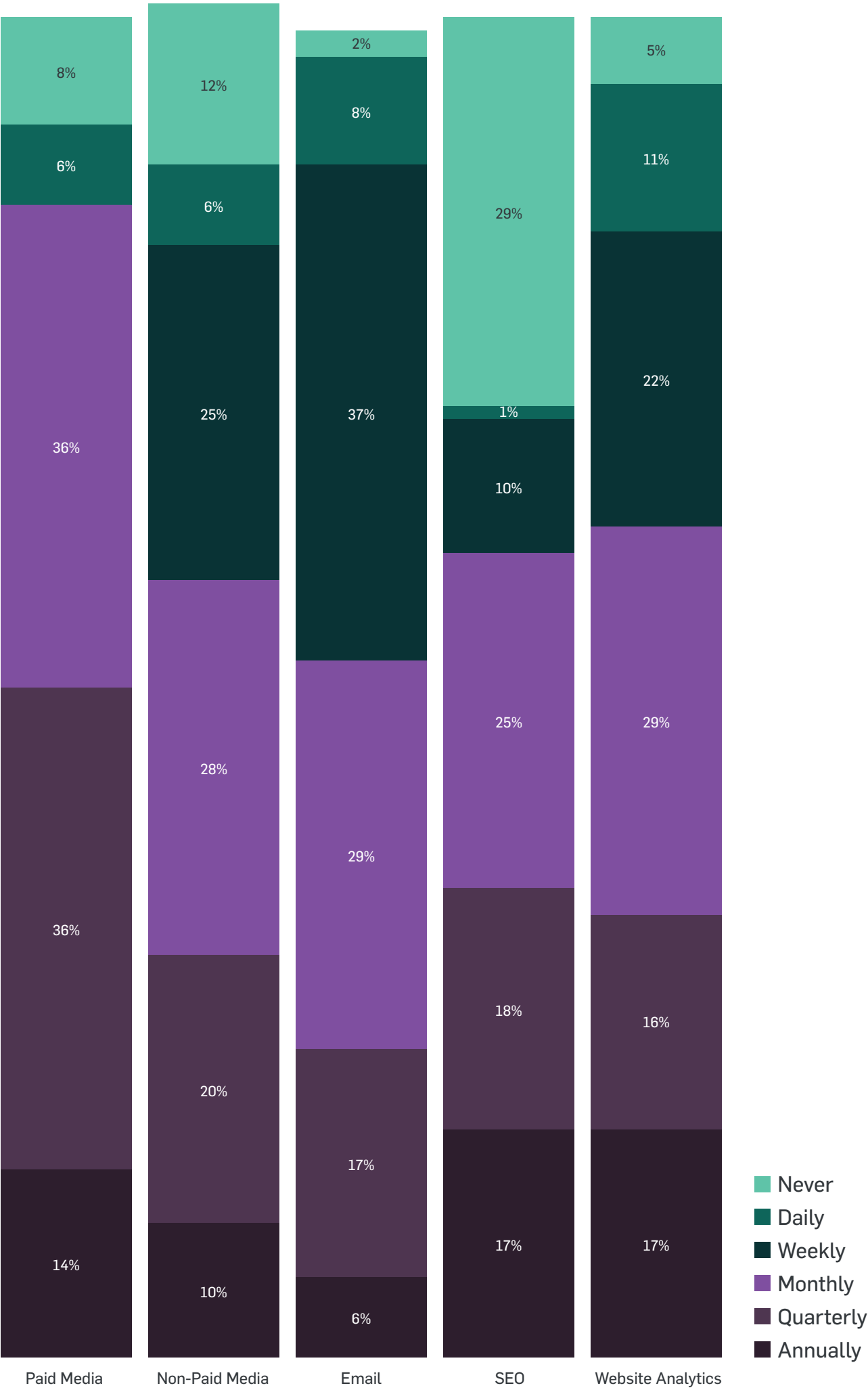
Figure 9.4
Professional Development & Training for Data Analysis & Related Skills, by Operating Budget



Looking across the field of respondents, we see variation based on data source in the frequency of using reporting to adapt digital marketing strategy. While outside the scope of the data available in this study, it's possible that these differences are due to the ease of extracting data from the particular platforms, or that reporting is provided for certain platforms by third party partners.

Figure 9.5

Frequency of Use of Data/Reporting to Review & Adapt Digital Marketing Strategy, All Organizations



Looking more closely you see that, for most channels, the frequency of adapting strategy based on data generally correlates with operating budget. This is suggestive of variation in resources and capabilities within organizations for harnessing the reporting from each platform.

CI Insight

Tapping into data relies on an infrastructure of adequate tracking of digital channels and platforms in order to have accurate reporting to analyze in the first place- a common challenge we see amongst organizations.



Figure 9.6a

Frequency of Use of Paid Media Data/Reporting to Review & Adapt Digital Marketing Strategy, by Operating Budget

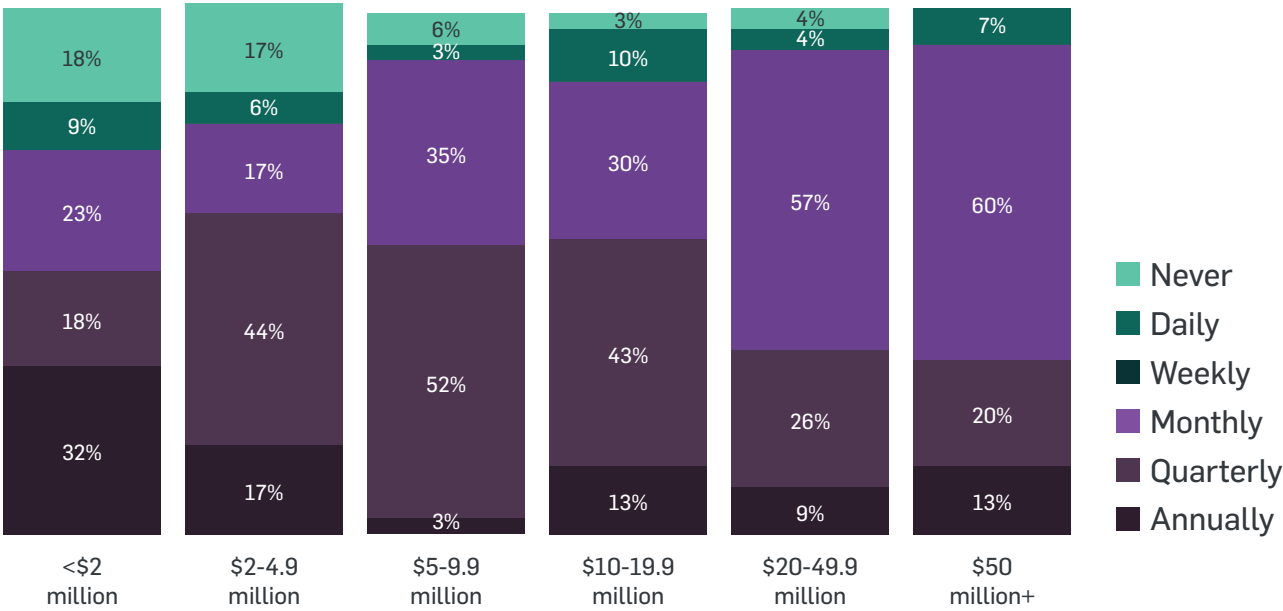


Figure 9.6b

Frequency of Use of Non-Paid Media Data/Reporting to Review & Adapt Digital Marketing Strategy, by Operating Budget

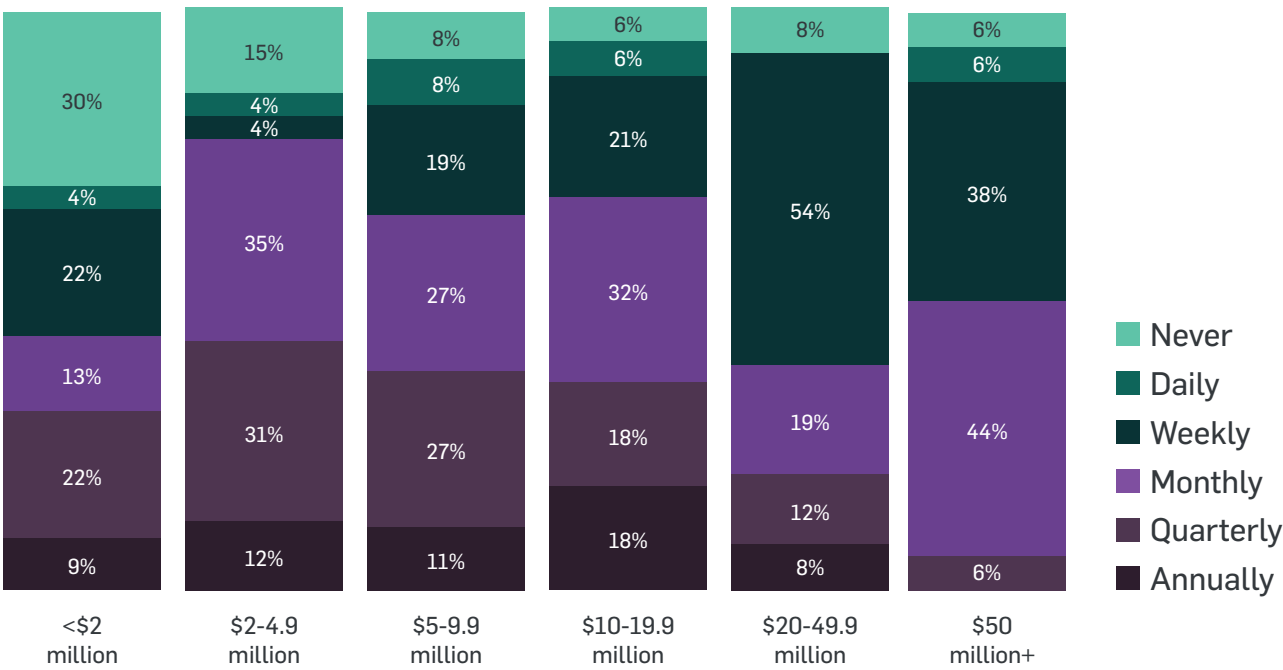


Figure 9.6c

Frequency of Use of Email Data/Reporting to Review & Adapt Digital Marketing Strategy, by Operating Budget

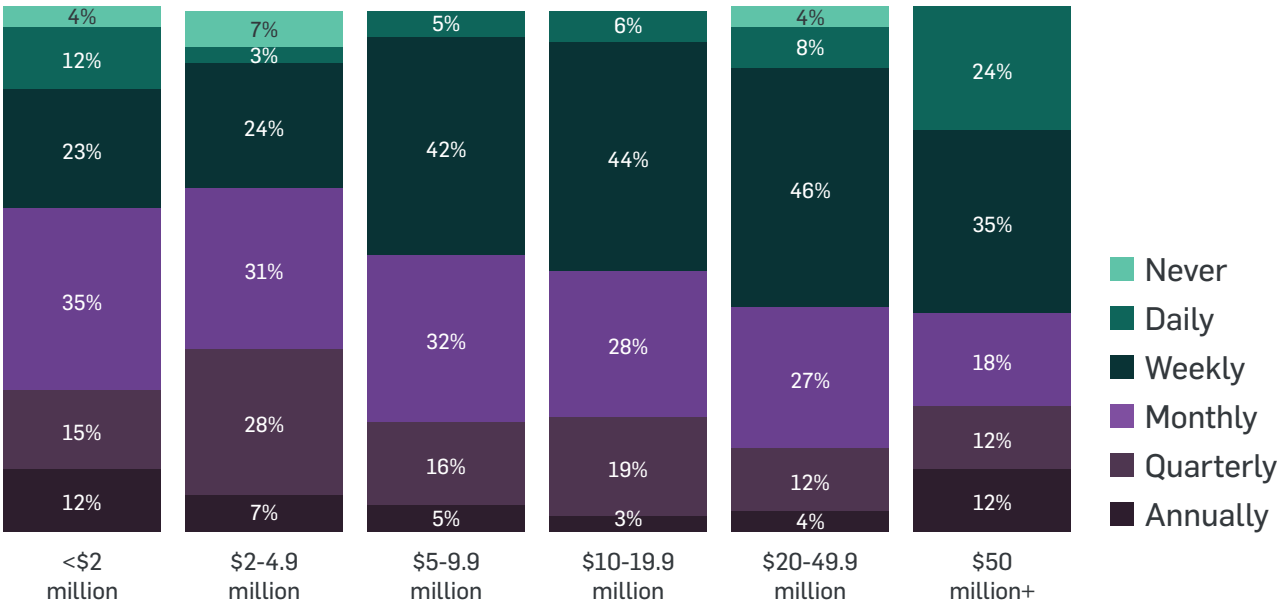


Figure 9.6d

Frequency of Use of SEO Data/Reporting to Review & Adapt Digital Marketing Strategy, by Operating Budget

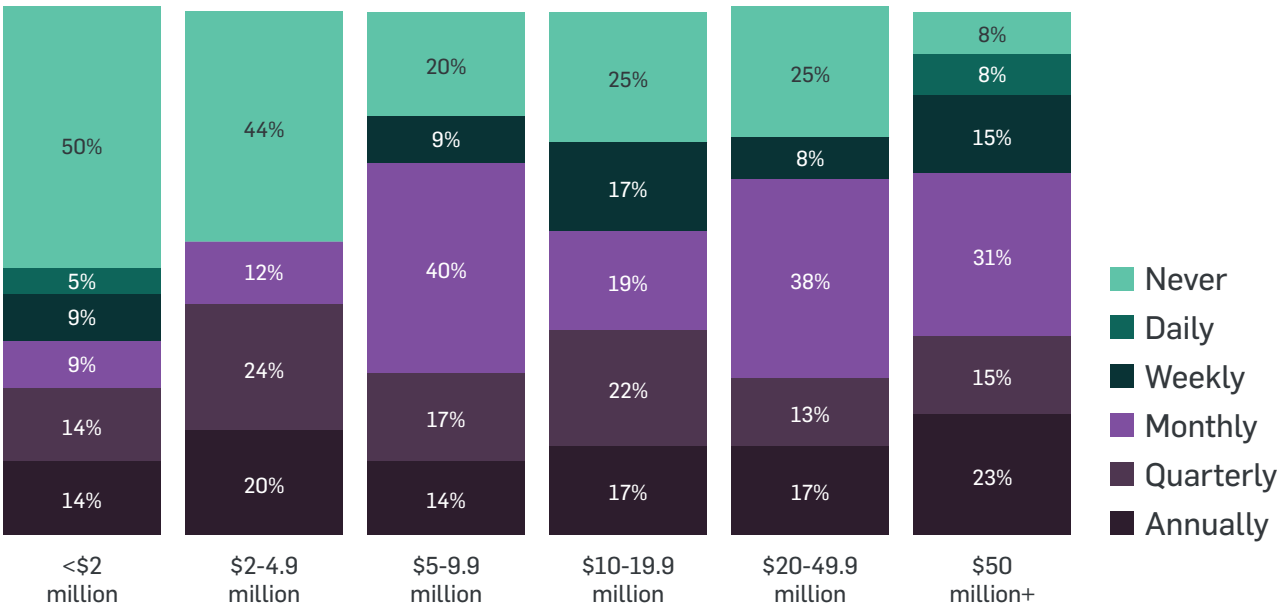
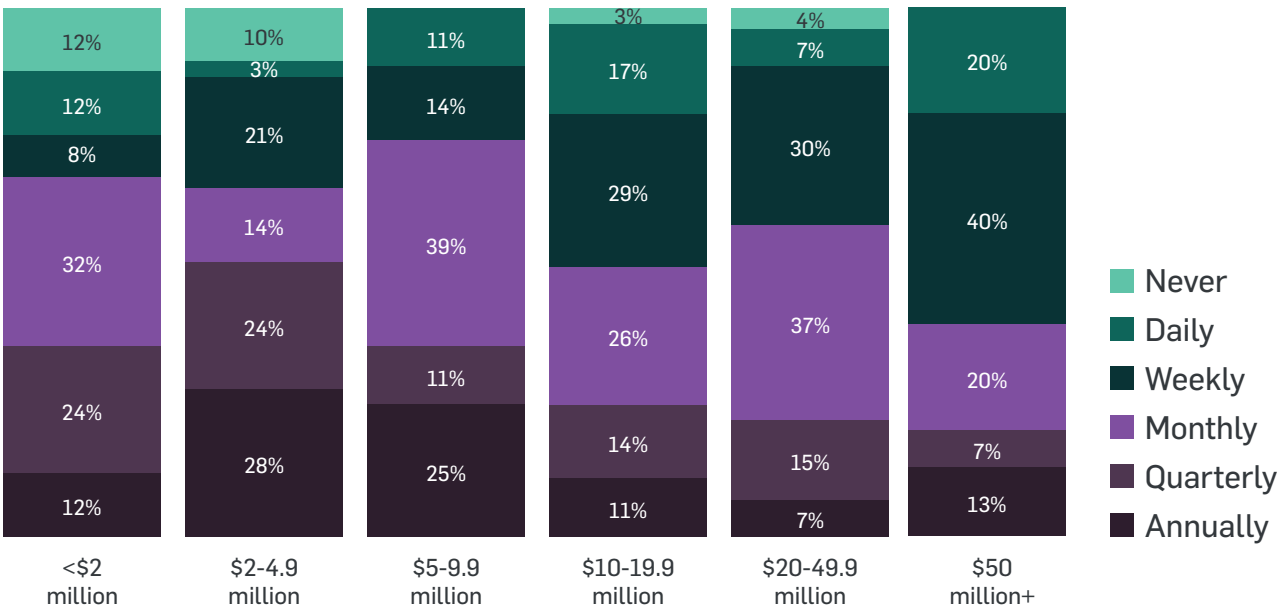


Figure 9.6e

Frequency of Use of Website Analytics Data/Reporting to Review & Adapt Digital Marketing Strategy, by Operating Budget



Far beyond any other option, the most frequently reported challenge to analyzing and using data, chosen by 80% of organizations, was that staff is spread too thin. A lack of staff skills/training followed at 48% and difficulty getting data from platforms rounded out the top three, chosen by 41% of organizations. Interestingly, inadequate budget came in at a distant fourth (16%) and was tied with a related challenge of needing help from experts, but not having available budget.

The two most frequently noted challenges resonate across other data in this section of the survey- such as the reported percentage taking advantage of professional development, staff FTE allocations to data/analysis, and the rate of using reporting to adapt digital marketing strategy.

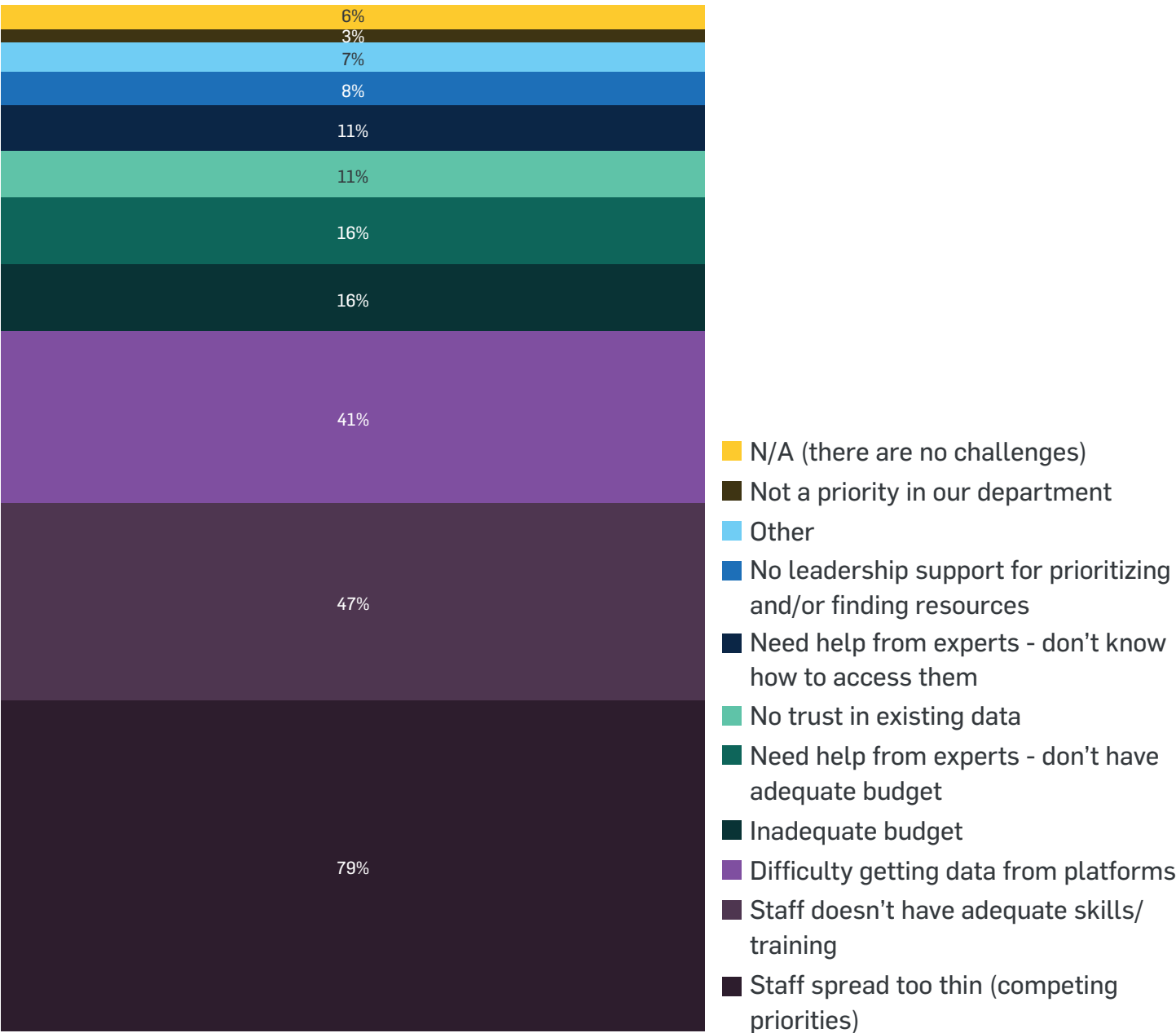
CI Insight

There is never an easy solution when staff is spread too thin. This top challenge suggests that a broader rethinking of priorities and the use of resources (for example, finding efficiencies by realigning roles across departmental lines) is needed.



Figure 9.7

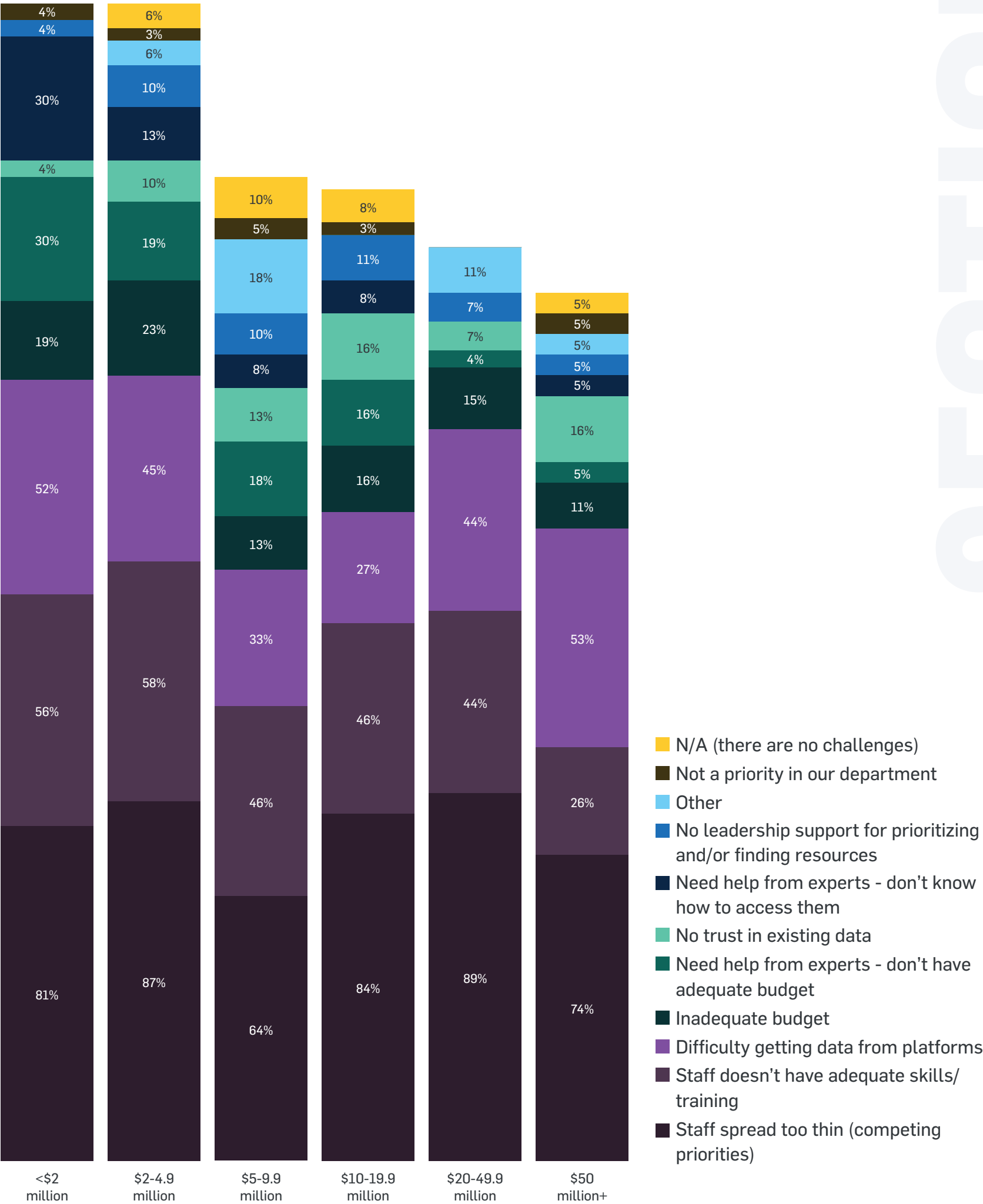
Most Significant Challenges to Accessing Data & Gaining Useful Analysis (Choose Up to Four), All Organizations



The top challenges remain across operating budget sizes (though to varying degrees); however, budget-related challenges are reported more often in operating budget categories under \$10 million. More organizations in the under \$5 million category reported that they need help from experts but don't know how to access that help, suggesting a knowledge gap for smaller organizations.

Figure 9.8

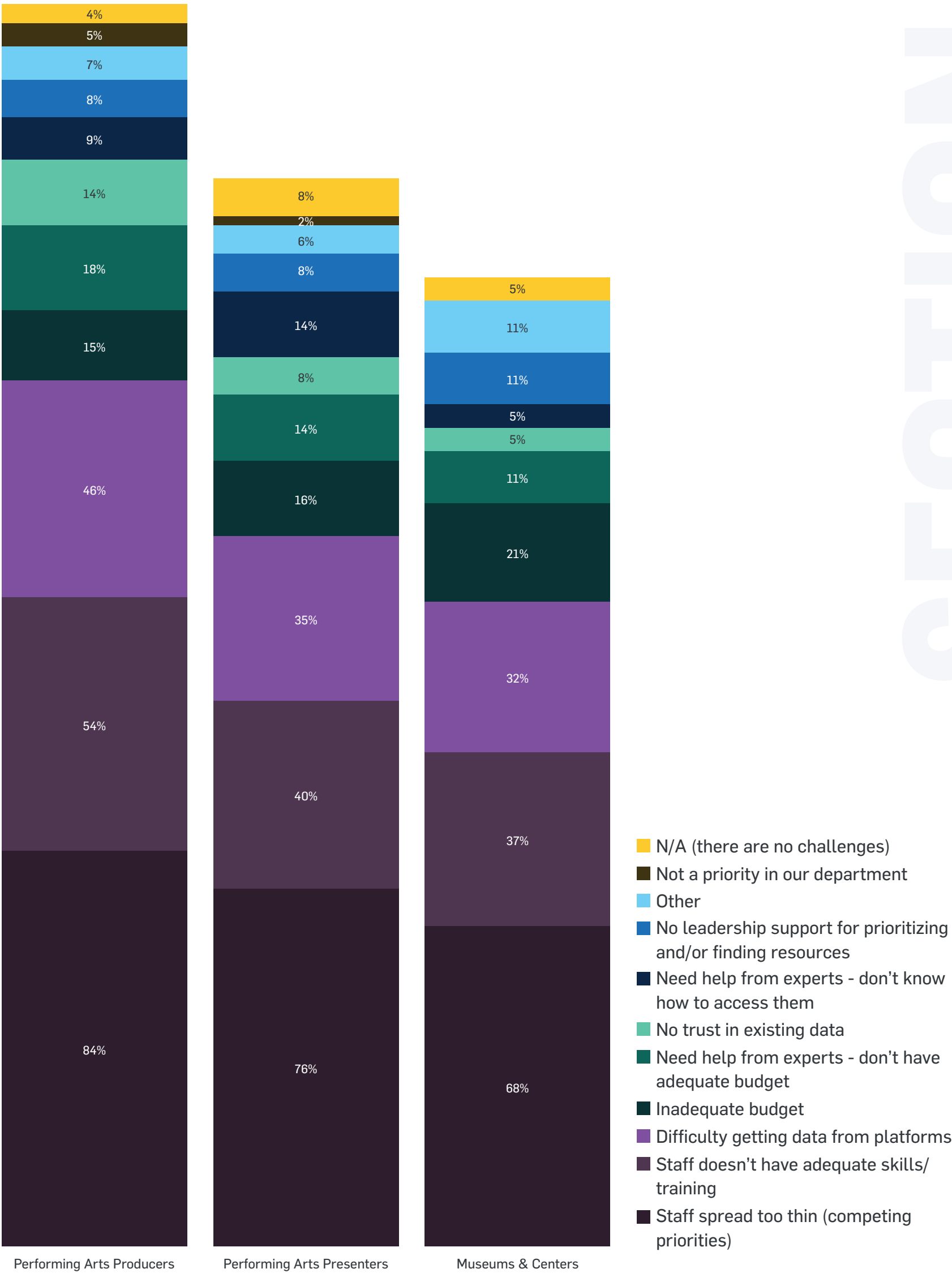
Most Significant Challenges to Accessing Data & Gaining Useful Analysis (Choose Up to Four), by Operating Budget



Differences appear when cut by organization type, with a greater percentage of Performing Arts Producers reporting many of the barriers.

Figure 9.9

Most Significant Challenges to Accessing Data & Gaining Useful Analysis (Choose Up to Four), by Organization Type



Since we first conducted our Benchmark Study back in 2012, we’ve been continually inspired by the growth and creativity demonstrated by the field as it embraces digital more and more each year. We see first hand with our clients (who range from marketing teams of one to over twenty) the abundant challenges faced around budget, resources, and workload. Yet, we also see how they rise to the occasion, tap their organization’s unique assets, and tackle new areas of learning every day. Because of this, we’re very optimistic for the future.

Critical challenges abound- it’s more evident than ever that in order to fully embrace digital, arts organizations must cultivate an organization-wide outlook on digital strategy that begins with it becoming a priority amongst leadership and staff. Then, with smart investments in infrastructure to enable a comprehensive data and analytics practice, coupled with resources to create content authentic to the organization and customized to patron segments, organizations will take leaps forward. This work will need to be matched by encouraging those third party partners who provide infrastructure and e-commerce platforms to more fully meet the needs of organizations. We hope to continue to do our part to make digital marketing smarter and more accessible to all.

We hope this Benchmark provides useful data and allows you to place your organization in context with your peers. Furthermore, we hope it inspires conversations at all levels of your organization. Thank you for your partnership as we all grow as a field.

Thank you to the industry service organizations and partners who assisted us in encouraging organizations to participate in this study, including Dance/USA, OPERA America, CAPA (Columbus Association for the Performing Arts), JCA Arts Marketing, and Jack McAuliffe, President of Engaged Audiences LLC.

We are grateful to the organizations that took time to complete this Benchmark survey:

Actors Theatre of Louisville	Cincinnati Opera
Adrienne Arsht Center	Cincinnati Playhouse in the Park
Alvin Ailey American Dance Theater	Cincinnati Symphony Orchestra
American Ballet Theatre	Contemporary Arts Center New Orleans
American Pianists Association	Court Theatre
American Repertory Theater	Culture Shock Miami, a program of the Miami-Dade County Department of Cultural Affairs
American Shakespeare Center	Denver Arts & Venues, a division of the City and County of Denver
Arden Theatre Company	Des Moines Performing Arts
AT&T Performing Arts Center	Dorset Theatre Festival
Atlanta Symphony Orchestra	Dr. Phillips Center for the Performing Arts
Atlantic Theater Company	Early Music Seattle
Auditorium Theatre of Roosevelt University	Ensemble Theatre Cincinnati
Bach Festival Society of Winter Park	Film Forum
Ballet West	First Stage
BalletMet	Flamenco Vivo Carlota Santana
Baltimore Center Stage	Ford's Theatre Society
BAM (Brooklyn Academy of Music)	George Mason University's Center for the Arts and Hylton Performing Arts Center
Birdland	George Street Playhouse
Boston Ballet	Gibney
Boston Symphony Orchestra	Goodman Theatre
Breckenridge Music Festival	Goodspeed Musicals
Bricolage Production Company	GREAT Theatre
Bryn Mawr Film Institute	Green Music Center at Sonoma State University
Cal Performances	Grounds For Sculpture
California Shakespeare Theater	Harris Center for the Arts
California Symphony	Hartford Stage
Caramoor Center for Music and the Arts	Hudson Valley Shakespeare Festival
Carnegie Hall	Huntington Theatre Company
Celebrity Series of Boston	Indianapolis Symphony Orchestra
Chicago Architecture Center	Institute of Contemporary Art / Boston
Chicago Symphony Orchestra	
Cincinnati Art Museum	
Cincinnati Ballet	

Irish Arts Center	Paper Mill Playhouse
Irish Repertory Theatre	Park City Film Series
Irving Arts Center	Peabody Essex Museum
Isabella Stewart Gardner Museum	Pennsylvania Ballet
Jacob’s Pillow	Pensacola Symphony Orchestra
Jazz at Lincoln Center	People’s Light
John W. Engeman Theater at Northport	Peoples Bank Theatre
José Limón Dance Foundation	Piffaro, the Renaissance Band
Kansas City Ballet	Pittsburgh Ballet Theatre
Kentucky Center for the Performing Arts	Pittsburgh Cultural Trust
Kun-Yang Lin/Dancers (KYL/D)	Playwrights Horizons
Lincoln Center for the Performing Arts	Proctors Theatre
Lobero Theatre Foundation	Roundabout Theatre Company
Lone Star Flight Museum	Royal Manitoba Theatre Centre
Lone Tree Arts Center	Royal Opera House
Long Wharf Theatre	Rubin Museum of Art
Longwood Gardens	San Diego Opera
Los Angeles Philharmonic	San Francisco Performances
Marin Theatre Company	San Francisco Ballet
Mayo Performing Arts Center	San Francisco Opera
MCC Theater	San Francisco Shakespeare Festival
McCallum Theatre	Santa Barbara Center for the Performing Arts/The Granada Theatre
Midland Center for the Arts	Schubert Club
Minneapolis Institute of Art	Science History Institute
Minnesota Orchestra	Seattle Opera
Mondavi Center for the Performing Arts	Seattle Repertory Theatre
Monmouth University Center for the Arts	Seattle Symphony
New Jersey Symphony Orchestra	Shotgun Players
New York City Ballet	Signature Theatre (NY)
New York City Center	Signature Theatre (VA)
New York Philharmonic	Solomon R. Guggenheim Museum
Next Act Theatre	South Coast Repertory
Northrop, University of Minnesota	St. Louis Symphony Orchestra
Oklahoma City Philharmonic	Stages Repertory Theatre
Omaha Performing Arts	Stamford Symphony
Opéra de Montréal	Stanford Live
Opera Philadelphia	Straz Center for the Performing Arts
Oregon Symphony	Symphony Space
Pacific Northwest Ballet	Syracuse Stage
Pacific Symphony	

- The Academy of Natural Sciences of Drexel University

The Aldrich Contemporary Art Museum

The Atlanta Opera

The Barnes Foundation

The Bushnell Center for the Performing Arts

The Clarice Smith Performing Arts Center

The Cleveland Pops Orchestra

The Frederick Children’s Chorus

The Grand Cinema

The John F. Kennedy Center for the Performing Arts

The Joyce Theater Foundation

The Museum of Fine Arts, Houston

The National Ballet of Canada

The New 42nd Street

The New Group

The People Movers

The Performing Arts Center, Purchase College

The Philadelphia Orchestra

The Phoenix Symphony
- The Wilma Theater

Theatre Calgary

TheatreSquared

Tilles Center for Performing Arts

Trinity Repertory Company

Troy Savings Bank Music Hall

Tucson Symphony Orchestra

UChicago Arts

UMass Fine Arts Center

University Musical Society (UMS)

Uppsala stadsteater

Vail Valley Foundation

Victory Gardens Theater

Virginia Arts Festival

Wave Hill

Wesleyan University's Center for the Arts

Westport Country Playhouse

Williamstown Theatre Festival

Wolf Trap Foundation for the Performing Arts

Our thanks also extends to organizations who completed the survey, but who fall into a category that did not get included in this year’s analysis:

- League of American Orchestras
- New Jersey Theatre Alliance
- The Art League

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12. The Google Grant program provides \$10,000 per month in free search engine marketing dollars to eligible non-profit organizations. More information can be found here: <https://www.google.com/intl/ALL/grants/>

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Techcrunch. "Mobile Internet Use Passes Desktop for the First Time, Study Finds." November 1, 2016. <https://techcrunch.com/2016/11/01/mobile-internet-use-passes-desktop-for-the-first-time-study-finds/>

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16. This idea of anticipated, relevant, and personal content comes from Seth Godin in his classic book, Permission Marketing:

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24. There are two approaches to advertising on Facebook. The Boosted Post option is a simplified extension of Facebook Ads Manager that allows you to promote posts directly from your page's timeline. It was built to make Facebook advertising more accessible to small businesses, which means it is simple and quick, but severely limits the features you can take advantage of. In contrast, Facebook Ads Manager is a sophisticated advertising platform that provides unparalleled capabilities for managing your campaigns, including advanced audience targeting, creative customization, additional placement and optimization options, and more control over how you structure, budget for, and measure the impact of your campaigns.

25. Programmatic display and content networks refers to the use of platforms (such as Google Display Network) that allow for automated buying and selling of display advertisements (both desktop and mobile) using real-time-bidding. Programmatic describes how online campaigns are booked, flighted, analyzed, and optimized via software and algorithms. This contrasts with direct placements of display ads where advertisers buy specific, fixed flights of display ads (display or mobile) on a given website.

26. Capacity Interactive and WolfBrown. "Performing Arts Ticket Buyer Media Usage Study: Results of a Survey of North American Ticket Buyers." December 2017. Pg. 17. <https://ideas.capacityinteractive.com/hubfs/WB%20CI%20Whitepaper/Performing%20Arts%20Ticket%20Buyer%20Media%20Usage%20Study%20-%20Whitepaper.pdf?t=1541415975539>

27. This link leads to a case study on the importance of SEO as part of a comprehensive approach to search:

Capacity Interactive. "Why It's Time to Reno Your SEO." February 21, 2018. <http://ideas.capacityinteractive.com/why-its-time-to-reno-your-seo>

28. Here are two blog posts that shed light on the importance of SEO and paid SEM for arts and cultural organizations:

Capacity Interactive. "Why It's Time to Reno Your SEO." February 21, 2018. <http://ideas.capacityinteractive.com/why-its-time-to-reno-your-seo>

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29. The Google Grant program provides \$10,000 per month in free search engine marketing dollars to eligible not-for-profit organizations. More information can be found here: <https://www.google.com/intl/ALL/grants/>

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31. This link leads to our CI to Eye Podcast landing page where you can learn about this and other available podcasts:

"What's Happening to Google Grants?: Kathleen McFarlane." July 9, 2018. <http://ideas.capacityinteractive.com/ci-to-eye-podcast>

32. Search Engine Journal. "60+ Mind-Blowing Search Engine Optimization Stats." December 29, 2017. <https://www.searchenginejournal.com/seo-101/seo-statistics/>

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Business Insider. "6 Predictions About Digital Trends in 2018." June 28, 2018. <https://www.businessinsider.com/6-predictions-about-digital-trends-in-2018-2018-6>

Search Engine Journal. "7 Ways a Mobile First Index Impacts SEO." March 27, 2018. <https://www.searchenginejournal.com/mobile-first-seo/246097/>

35. Capacity Interactive and WolfBrown. "Performing Arts Ticket Buyer Media Usage Study: Results of a Survey of North American Ticket Buyers." December 2017. Pg. 23. <https://ideas.capacityinteractive.com/hubfs/WB%20CI%20Whitepaper/Performing%20Arts%20Ticket%20Buyer%20Media%20Usage%20Study%20-%20Whitepaper.pdf?t=1541415975539>

36. Google Webmasters Central Blog. "Rolling Out Mobile-First Indexing." March 26, 2018. <https://webmasters.googleblog.com/2018/03/rolling-out-mobile-first-indexing.html>

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38. Ibid., Pg. 20

39. Ibid.

40. This idea of anticipated, relevant, and personal content comes from Seth Godin in his classic book, Permission Marketing:

Godin, Seth. *Permission Marketing: Turning Strangers into Friends, and Friends into Customers*. New York: Simon & Schuster, 1999.

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Capacity Interactive (CI) is the premier digital marketing consulting firm for culture and the arts. Founded in 2008 by Erik Gensler, Capacity Interactive partners with leading arts and cultural organizations to help them build audiences, engage community, and market smarter. Practice areas include digital strategy, web analytics, A/B testing, search engine optimization, search engine marketing, social and display advertising, and email strategy. CI developed and licenses two software products: **Behavior Infuser**, which provides marketing automation including triggered email for Tessitura licensees, and **Leadacity**, a plug-in that helps organizations collect more leads on their website.

CI has a focus on education for our clients and the arts and cultural sector as a whole. CI hosts Digital Marketing Boot Camp for the Arts, an annual conference in New York City, and Capacity Classroom, a series of webinars and small group workshops where arts marketers can strengthen their digital skills.

Check out our podcast, CI to Eye, on **iTunes**, **SoundCloud**, and **Google Play**.

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