



STATE OF THE ARTS MARKETING

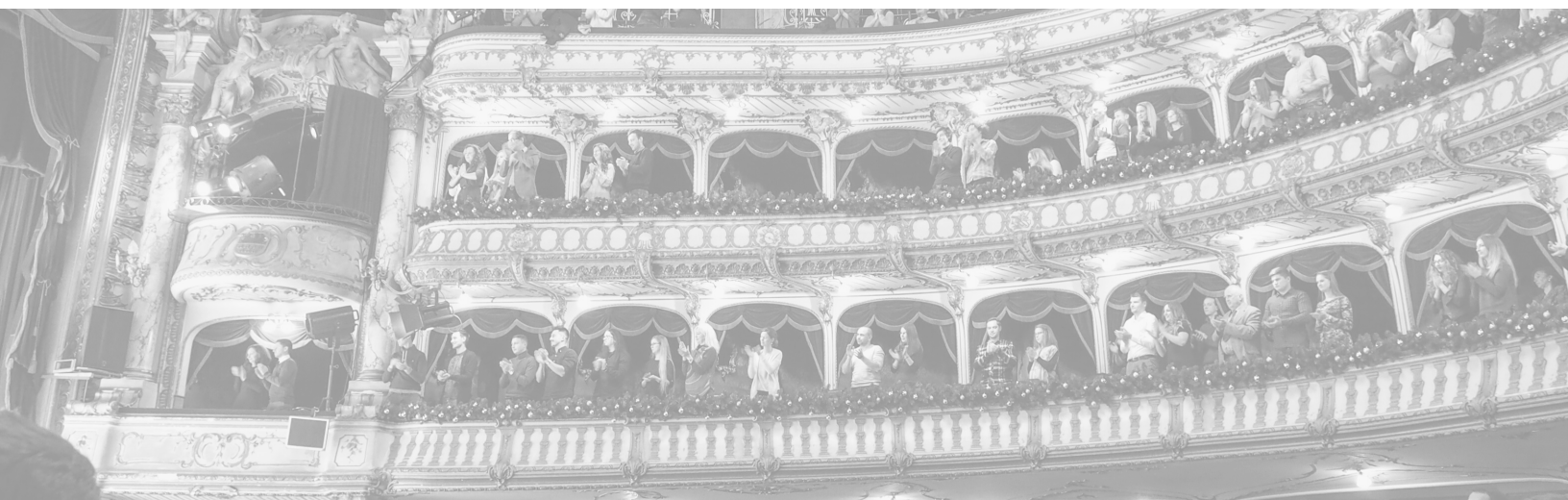
2021 - Q1
EDITION

INTRODUCTION

Arts organizations have faced a truly challenging and transformative year. In the face of the global pandemic, the arts have had to be flexible in responding to this ever-changing environment, directly impacting the ability to bring their communities together. It's as true today, as a year ago, that MogoARTS remains committed to our partners to share innovation, insights, and inspiration to bring the arts and their audiences together.

We are proud to continue to do just that with our latest release of the State of the Arts Marketing whitepaper. In the [June 2020 report](#), there was a sense of uncertainty on what the future held and how organizations were moving forward. However, in this report, organizations are expressing a clear vision focusing on engaging their loyal audiences while being strategic and committed to building new relationships within their communities. This report highlights how organizations used this past year to re-strategize and develop key priorities for this year.

We are excited to provide these results as a message of hope and resilience of the arts community and our commitment to supporting our partners. We know how challenging the past year has been and we are hopeful for what the year to come will look like. As always, the show must go on!



EXECUTIVE SUMMARY

In order to share learnings across our arts community, MogoARTS surveyed more than 720+ arts organizations to better understand how they are navigating, planning, and strategizing for their business. The survey results shed light on how arts organizations are responding to the ongoing global health crisis and how they are adapting their initiatives to bring the arts to their patrons.

This survey highlights how the arts community is focusing their organizational and marketing initiatives to engage their loyal audiences, while strategically developing opportunities to build relationships amongst new or underrepresented audiences.

This report aims to outline the top priorities arts organizations are focusing on, when and how they will return to the stage, what safety measures are being considered, as well as the key areas of focus that will drive their business forward.

WHAT YOU'LL LEARN:

- The top organization and marketing priorities by genre
- When and how arts organizations are planning to return to the stage
- Safety measures that should be considered to make arts patrons more likely to return to the venue
- Key strategies and tactics to engage loyal audience members
- Strategic initiatives geared toward broader audiences

BACKGROUND AND METHODOLOGY

This report is based on survey results and insights highlighting how arts organizations are prioritizing their efforts in early 2021.

Many of our partners have been strategizing and contemplating how they will be able to get back in front of their audiences. MogoARTS continued this survey in hopes of sharing how organizations are responding and outline the shifts arts organizations have made since July 2020. This report provides insights into the key organization and marketing objectives the community is focusing on.

This survey was sent to 724 arts organizations through email and newsletter subscribers. It ran from Jan 27 – Feb 10, 2021 and contained a total of 8 questions. To supplement our report, we also leveraged other 3rd party arts survey results linked to the right to help provide additional insights and recommendations.



Better Marketing: [A Brief Guide: Culture Marketing Trends for 2021](#)

Tessitura Network: [How to Approach Physically Distanced Seating](#)

Tessitura Network: [Seven Tips for Reopening](#)

TRG Arts: [Arts and Culture Comeback Planning: January 2021](#)

TRG Arts: [COVID-19 and Philanthropy – Giving in 2020](#)

TRG Arts: [Top 10 Business Trends for Arts and Cultural Organizations for 2021](#)

KEY LEARNINGS

CHALLENGES

- 88% of respondents are looking for ways to maximize revenue while re-engaging audiences in a way that is safe and comfortable
- “Most organizations are operating with reduced resources, tight budgets, and a lot of hope holding everything together”

[Tessitura: 2021](#)

LOYAL AUDIENCES

- Donor development is a key opportunity for 2021 as arts organizations saw a 15% increase in gifts received in 2020 YOY ([TRG Arts: 2020](#))
- Communication tactics such as email, organic social, newsletter, etc. will help organizations engage their more loyal audience members



KEY LEARNINGS

AUDIENCE EXPANSION

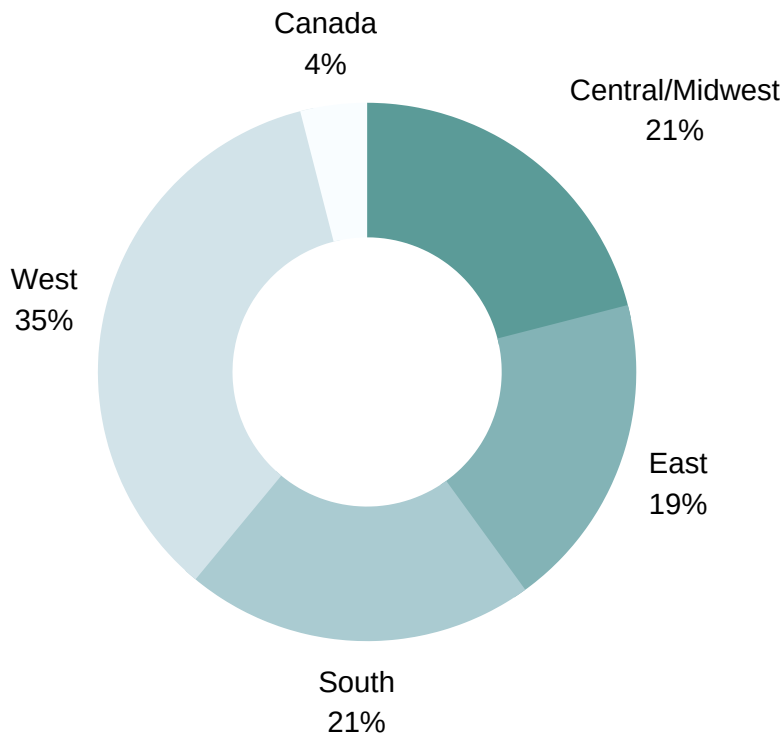
- 14% of organizations are looking toward CRM growth through lead generation or market expansion strategies to grow their overall patron base
- Equity, Diversity, and Inclusion initiatives are reported as an important strategy to engage a wider and more representative audience that is reflective of the communities these organizations serve

UNCERTAINTY

- With the underlying optimism of the responses, there are still 13% of arts organizations reporting they are undecided about their go-forward planning
- 11% haven't determined a strategy to host in-venue events, which reflects the long-term impact of COVID-19 on the community



WHO RESPONDED

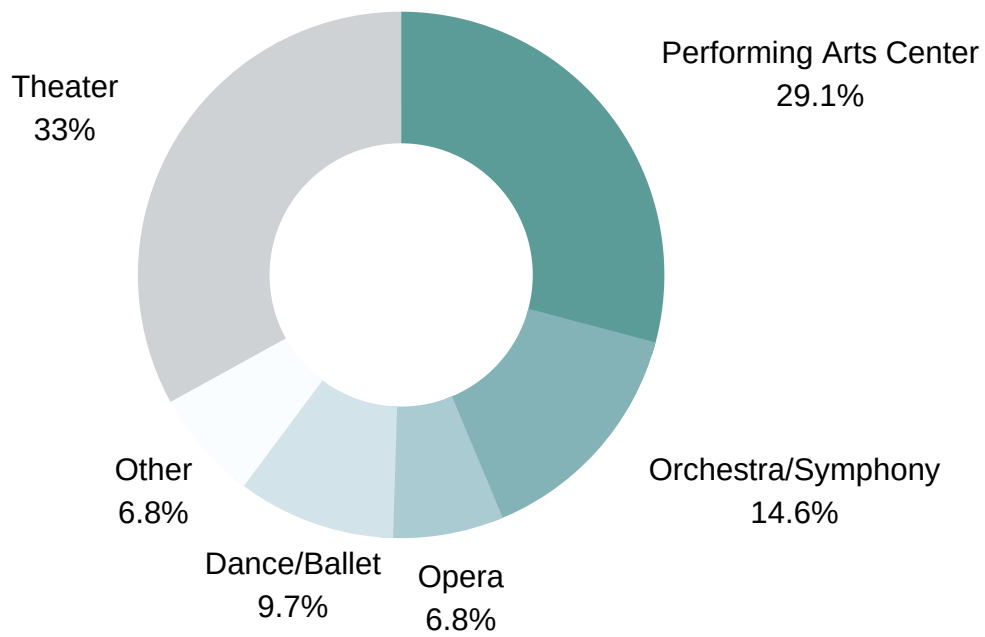


REGION

In terms of responses, we saw comparable response rates by region as we did in the 2020 survey results. In this iteration we also segmented our Canadian partners which made up 4% of our respondents.

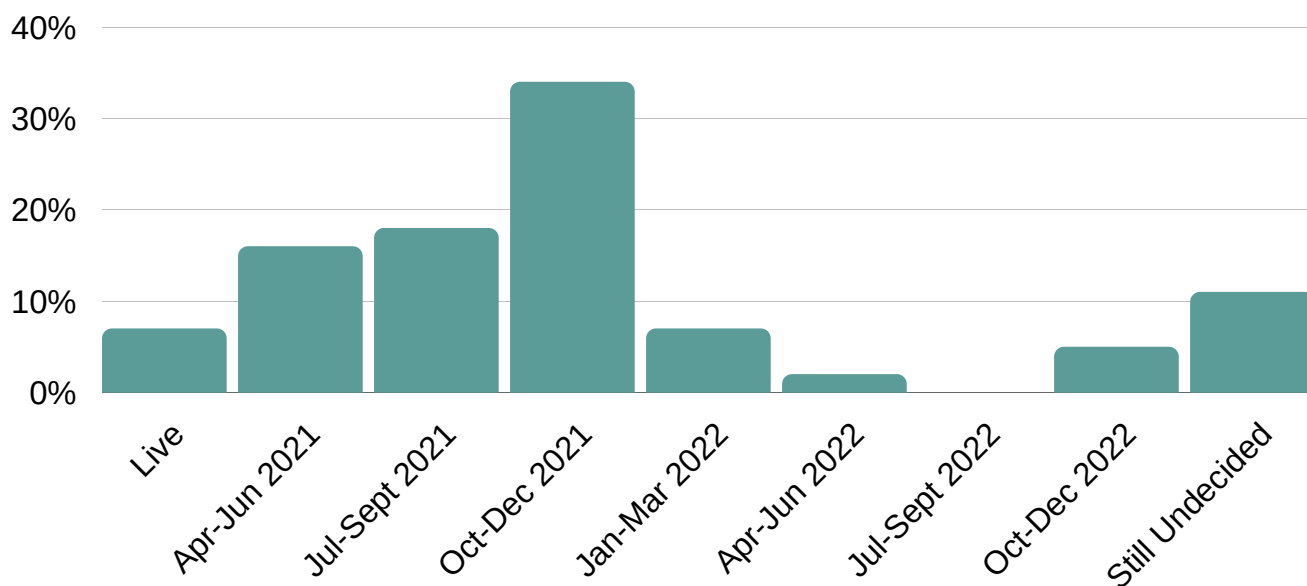
GENRES

Along with the regions, we have a strong representation amongst the different types of arts genres. Theaters and performing arts centers comprise the highest volume of respondents. Dance/Ballet and Orchestra/Symphony organizations followed. Then Operas and Other: Museums, Education Centers, Festivals, Arenas were represented within the results that follow.



REOPENING

Arts organizations are looking forward to returning to live in-venue events. In our 2020 report, 67.9% of respondents were anticipating hosting patrons at their venues by 2021. As communities start to open up and vaccinations become more widely accessible, most organizations are expecting to be in-person with their patrons by Q4 of this year.

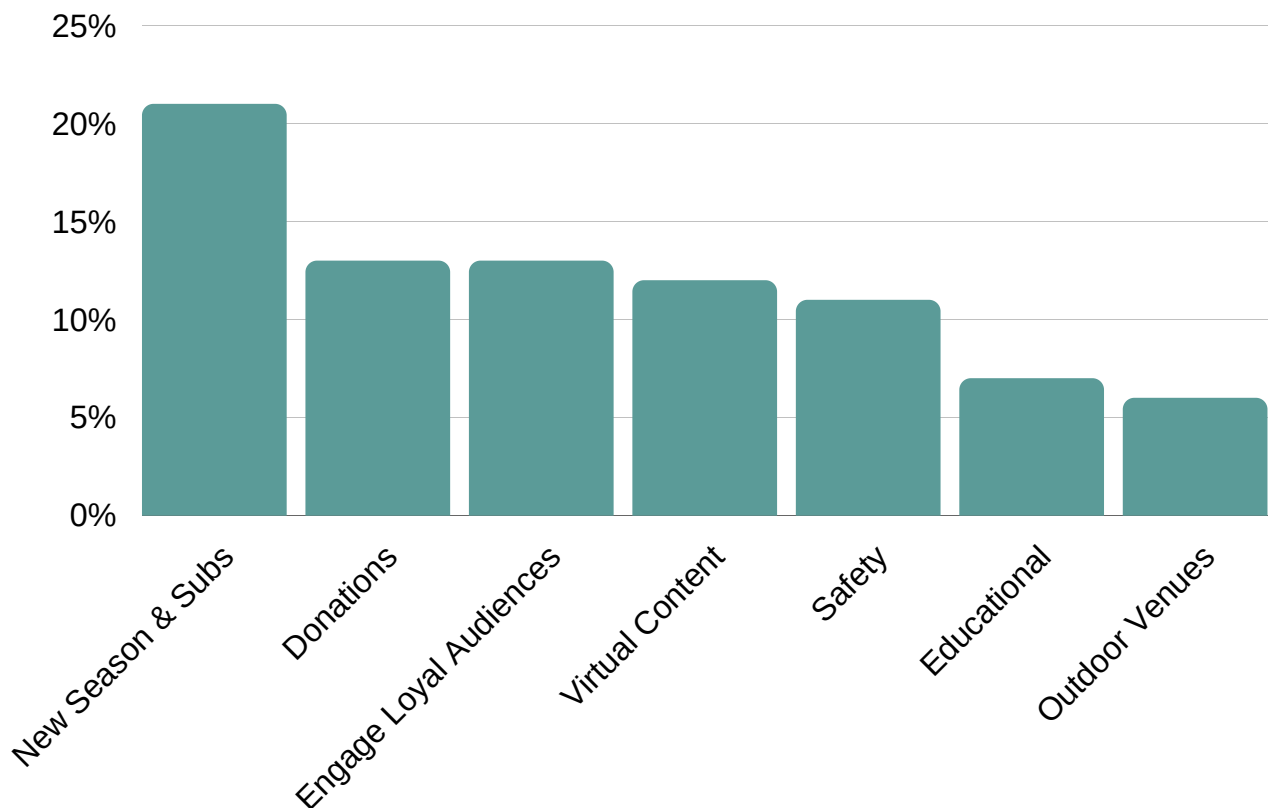


- **75% of respondents report they will be live by end of this year.** With a majority (34%) planning on having live events by Oct-Dec 2021
- **7% have already gone back to live performances** exclusively in the South and Midwest regions
- **11% are still undecided** on what their in-person event strategy will be, primarily citing the vaccine as the biggest factor toward getting back into their venues

ORGANIZATIONAL PRIORTIES

In order to better understand the trends in planning for this year, we asked about their top priorities as an organization for the next six months. The top results were clear:

- **40% of all organizations mentioned a strategy to tap into their loyal audiences** including Subscriptions/Season Planning, Donations, & Loyal Audience outreach
- **13% were working on a virtual content** offering while another 7% were working on an outdoor venue strategy
- **11% are prioritizing developing their safety precautions** for in-person events
- **7% are focused on an educational offering**



Loyal audience engagement is going to be a big trend this year for arts organizations. Our partner TRG Arts reported that **90% of all organizations** remain relationally tethered to subscribers and loyal audiences ([TRG Arts: 2021](#)). Engaging loyal patrons will be a primary strategy for driving revenue, selecting programming/exhibits, developing new offers like virtual or outdoor events, and when and how to return to stage.

PRIORTIES CONTINUED

While each genre has their priorities; [subscriptions](#), [donations](#), loyal audience engagement, season planning and virtual content production are the clear areas of focus for arts organizations this year.

	DANCE/ BALLET	MULTI-GENRE PAC	OPERA	ORCHESTRA/ SYMPHONY	THEATRE	OTHER
PRIORITY #1	Virtual Content Production 29%	Subscriptions 17%	Subscriptions 34%	Season Planning 17%	Engage Loyal Audiences 22%	Donations 21%
PRIORITY #2	Donations 24%	Season Planning 14%	Donations 25%	Subscriptions 15%	Season Planning 14%	Safety Precautions & Preparations for In-Person Events 18%
PRIORITY #3	Season Planning 18%	Engage Loyal Audiences 13%	Virtual Content Production 17%	Donations 13% & Engage Loyal Audiences 13%	Donations 12%	Engage Loyal Audiences 14%



SUPPORTING LIVE EVENTS

As organizations plan to get back in front of their patrons, there are a few trends that are driving their in-person event strategy. Reducing seating capacity, mix of virtual and in-person events, and outdoor performance are all the top priorities.

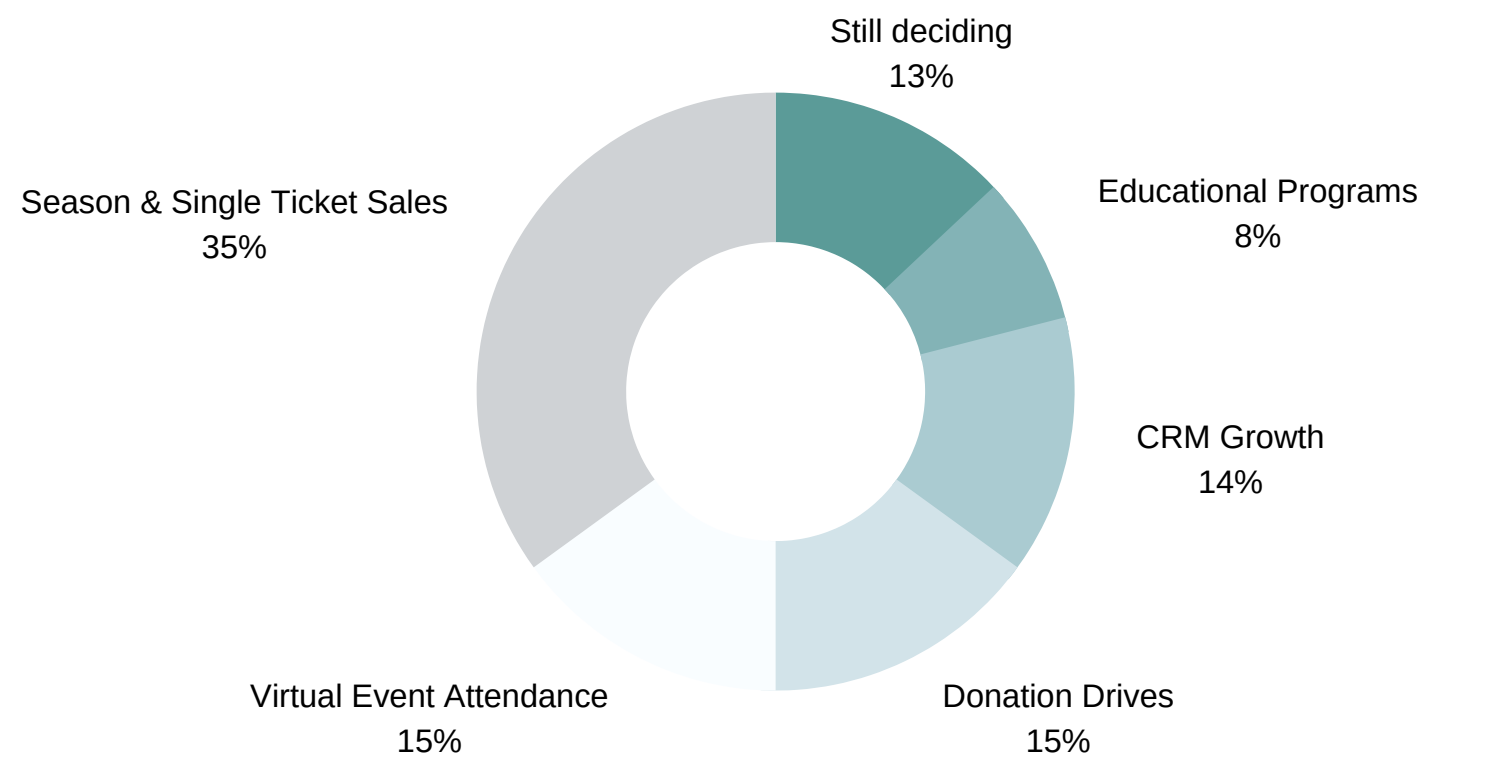
	DANCE/ BALLET	MULTI-GENRE PAC	OPERA	ORCHESTRA/ SYMPHONY	THEATRE	OTHER
PRIORITY #1	Reducing Seating Capacity in Venue 30%	Reducing Seating Capacity in Venue 30%	Mix of Virtual & Live Performances 41%	Mix of Virtual & Live Performances 35%	Mix of Virtual & Live Performances 20%	Reducing Seating Capacity in Venue 40%
PRIORITY #2	Outdoor Performances 20% & Mix of Virtual & Live Performances 20%	Outdoor Performances 17%	Outdoor Performances 33%	Capacity in Venue 26% & Outdoor Performances 26%	Reducing Seating Capacity in Venue 18%	Outdoor Performances 20% & Reducing the number of events 20%

KEY LEARNINGS

- **26% of respondents reported reduced seating** for social distancing is key
- **23% are diversifying their offering to include both virtual & in-person events**
- Hear how our partners at [SFJAZZ](#) & [Monterey Jazz Festival](#) made virtual events work
- **19% are looking at outdoor performances** and will be a big part of 2021 strategy
Hear how [ZACH Theatre](#) approached planning their outdoor concert series in 2020

MARKETING PRIORITIES

As far as planning for this season, we asked our survey respondents about their key priorities. Ticket sales and donations lead the pack, but we are seeing [educational programs](#), CRM growth, and a focus on maximizing grants as ways marketing teams are helping to support their organizations.



AUDIENCE EXPANSION

Alongside engaging loyal patrons, we are seeing organizations developing audience expansion strategies. Arts organizations are reporting that there are two key strategies that they are taking to reach new audiences.

The first is through CRM growth: 14% of responding organizations say that focusing on expanding their CRM database is an important area of focus. Prospecting efforts to drive new patrons can take a few forms. In working with our arts partners, Mogo is running [lead generation campaigns](#) to engage audiences with free online content at a time when they were unable to perform live or produce original content virtually.

The second way, for those offering virtual events, is to geo-target outside their traditional market to find arts enthusiasts outside their immediate community. In working with partners, leveraging Google Analytics site traffic insights by geo, arts organizations have been able to [test new market outreach](#) to see which areas are most likely to engage new patrons. It's another opportunity for audience expansion as virtual content becomes more available.



EQUITY, DIVERSITY, & INCLUSION

However, we are seeing a second trend, one that focuses on Equity, Diversity, and Inclusion initiatives. Many organizations wrote into the survey to talk about expanding their audience outreach strategy to be more inclusive and representative of the communities they serve. Many are doing the work to address their [programming, marketing, communication, and outreach](#) to engage underrepresented populations. This is one of the key strategies arts organizations are turning to in order to be more inclusive and lean into the opportunity to engage new audiences to the arts. Here is how [Dallas Theater Center](#) is driving EDI initiatives within their own organization to become a more inclusive space for their community.

No matter if it's through lead generation, new market testing, or thorough EDI goals, arts organizations are making it clear that audience expansion and inclusivity are opportunities for them to better serve their patrons.



OUTREACH

To support marketing priorities, teams will be leaning into organic strategies to connect with their audiences.

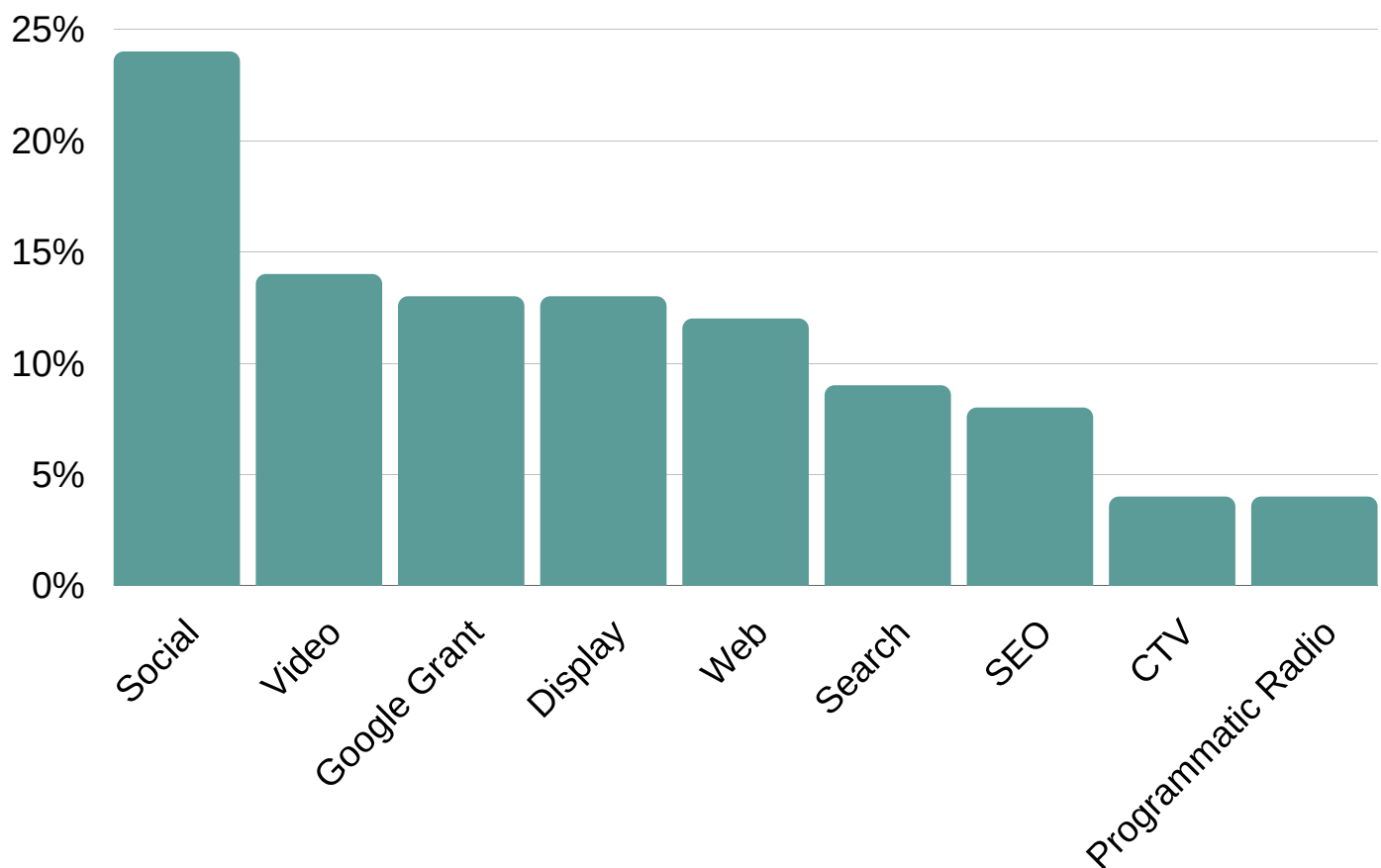
	DANCE/ BALLET	MULTI-GENRE PAC	OPERA	ORCHESTRA/ SYMPHONY	THEATRE	OTHER
PRIORITY #1	Promoting Events 21%	Email Marketing 18%	Email Marketing 24%	Email Marketing 18%	Email Marketing 18%	Paid Media Efforts 20%
PRIORITY #2	Email Marketing 16%	Promoting Events 15%	Organic Social Media 17%	Video Content Development 14%	Promoting Events 15%	Email Marketing 15%

KEY LEARNINGS

- Of Marketing Teams that responded, **22% are focusing on content development and 15% on event promotion**
- **17% will tap into email marketing strategies, and 12% will focus on organic social media** to strengthen relationships with their patrons
- Leaning into organic marketing with a strong focus on content will help to engage loyal audiences

MARKETING INVESTMENTS

While marketing teams are experiencing a cut in their budget, there is a sense of wanting to make the right investments for their organization's long term growth. So along with the priorities marketing teams are leaning into, there is a need for some paid media investment. When asking arts marketing leaders where their teams will be investing time and money in the upcoming year, here are the results:



KEY LEARNINGS

- Social came in as the #1 priority to invest in across all genres with a +71% lift over any other strategy
- Video (14%), Display (13%), Google Grant (13%), and Website (12%) optimizations rounded out the top 5, representing 76% of all responses

LOOKING FORWARD

As arts marketing departments continue to develop their initiatives and priorities for this year, we put together a list of helpful ideas to continue to discuss internally to aid your organizations:

LOOK FOR INNOVATION

- Strengthen your membership base and leverage content and outreach strategies to engage your patrons
- Stay open to new revenue opportunities including virtual, outdoor, and partnerships
- Lean into education programs to engage your community and create another revenue source ([Better Marketing: 2021](#))

IN VENUE

- To maintain safe distances, you're conservatively looking at 30-50% of your usual capacity ([Tessitura: 2020](#)). Work with your ticketing vendor partners like Tessitura to come up with your optimal seating strategy
- Explore software plugins or upgrades that can support social distanced seating or various scenarios
- Add in arrival times, entry and exit doors, and concession strategies to help your patron-base feel comfortable returning to your venue ([Tessitura: 2020](#))

COMMUNICATION

- Communicate how you are going to make people safe via your website, email, and signage throughout your venue
- Make sure to survey your patrons to elicit audience feedback in order to make adjustments and optimize your in-venue experience to make patrons feel safe ([Tessitura: 2021](#))

CONCLUSION

The global impact of the COVID-19 pandemic has deeply impacted the arts. This has challenged organizations to react quickly to changing environments, make very challenging business decisions, and look for ways to innovate.

This year, arts organizations will be setting priorities, building a strategy for returning to the stage, supporting key initiatives, especially to connect with their loyal patrons and looking for opportunities to expand their audiences.

While many organizations have shared how they plan to move forward this year, there are still 13% of respondents who have a less-than-clear vision of what 2021 will look like. It's our goal that the insights this whitepaper provides can help spur conversations and highlight strategies from their industry counterparts to help support arts organizations in their planning. We hope that something in this report will inspire an idea or dialogue within your team, department, or organization to help you plan for the coming year.

For further discussion around how arts organizations are managing during this time, please take a look at our [Arts Innovation Webinar Series](#), where we host conversations with organizations around the country who are working through strategies to help bring the arts to their patrons.

Thankfully the future is looking brighter and the show will go on.

