



STATE OF THE ARTS MARKETING

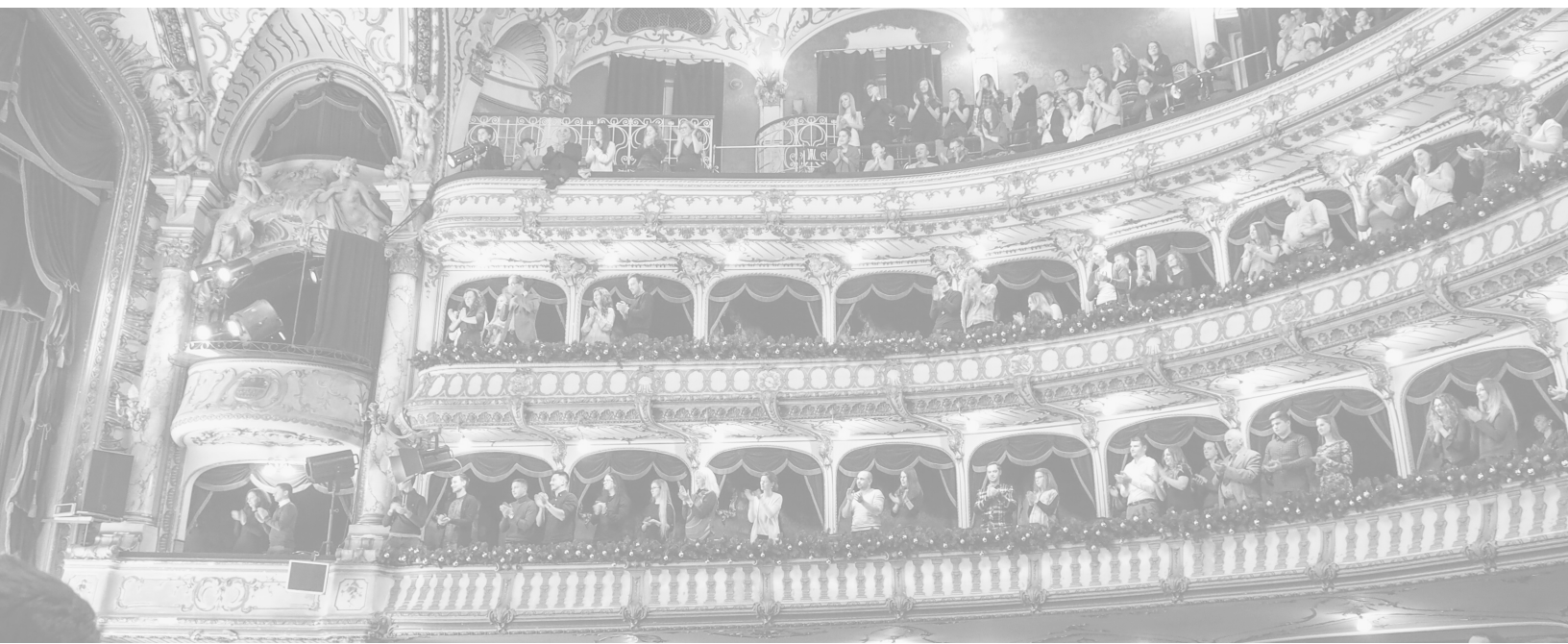
2021 - Q3
EDITION

INTRODUCTION

In the face of the global pandemic, the arts remained flexible in responding to this ever-changing environment, directly impacting the ability to bring their communities together. It's as true today, as almost 2 years ago, that MogoARTS remains committed to our partners in order to share innovation, insights, and inspiration to the arts community.

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 optimism for welcoming back their patrons. This report highlights how organizations used this past year to re-strategize and develop key priorities from programming, budgeting, and communication strategies.

We are excited to share the results and our commitment to supporting our partners as the arts community comes back together. As always, the show must go on!



EXECUTIVE SUMMARY

In order to share learnings across our arts community, MogoARTS surveyed more than 470+ arts organizations translating to over 850 individuals 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 its organizational and marketing initiatives to welcome audiences back to in-person events while balancing more responsibilities.

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
- How programming considerations factored into their reopening strategy
- Key strategies and tactics to engage loyal audience members
- Communicating strategy is key to engaging audiences and sharing safety strategies

BACKGROUND & METHODOLOGY

This report is based on survey's results and insights highlighting how arts organizations are prioritizing their efforts in late 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 to share how organizations are responding and to 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 479 arts organizations through email and newsletter subscribers. It ran from Sept 9 – Sept 23, 2021 and contained a total of 13 questions. To supplement our report, we also leveraged other 3rd party arts survey results to help provide additional insights and recommendations.



MogoARTS: [Arts Innovation Webinar Series](#)

MogoARTS: [How Arts Subscriptions are Evolving](#)

MogoARTS: [4 Ways to Drive Donations with Incentives](#)

Tessitura Network: [Demand for Live Events is Soaring, Be Prepared](#)

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

Tessitura: [Seven Tips for Reopening](#)

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

KEY LEARNINGS

REOPENING

- 97% of organizations will be back to hosting live events by December 2021, 50% of which had already returned to the stage
- These organizations are pushing to reopen to accommodate and support audiences during their holiday season

DOING MORE WITH LESS

- 87% of organizations are reporting flat or a decrease in marketing budgets with a 2.4x lift since January in organizations reporting the need to balance new roles and more responsibilities due to reduced staff and support
- “Most organizations are operating with reduced resources, tight budgets, and a lot of hope holding everything together” ([Tessitura: 2021](#))



KEY LEARNINGS

PROGRAMMING

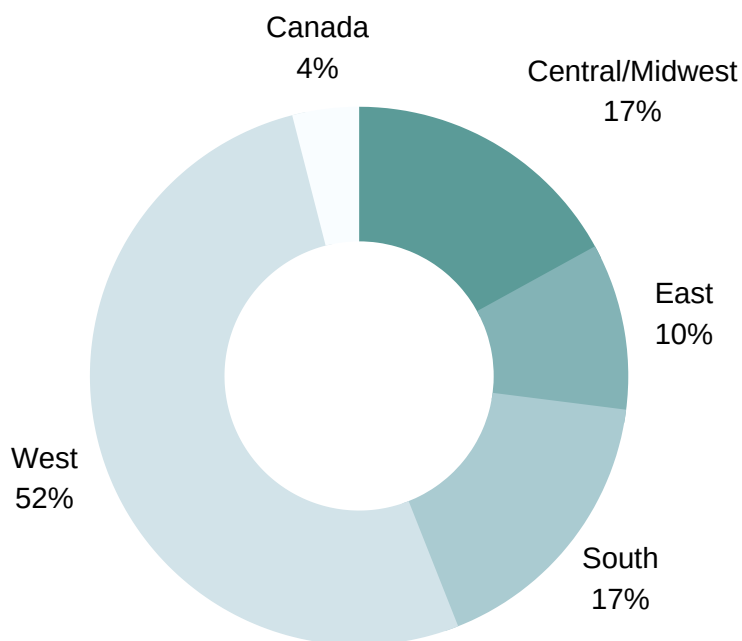
- 62% of organizations had to make programming decisions to support staff and talent safety requirements as well as accommodate social distance seating
- 18% of organizations reported a delay in reopening caused by the availability of staff and talent

COMMUNICATION IS KEY

- Organizations are leaning into a communication strategy to announce programming, reopening, safety protocols, as well as engage loyal audience
- Communication tactics such as email, organic social, newsletter, etc. will help organizations engage audiences



WHO RESPONDED

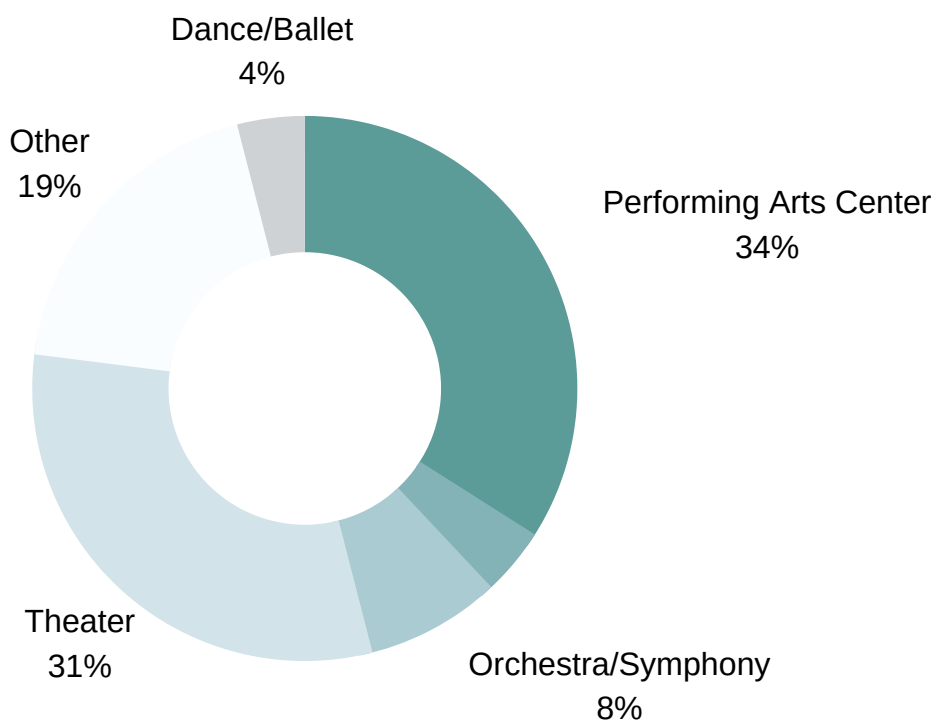


REGION

In terms of responses, we saw comparable response rates by region as we did in the early 2021 survey results. In this iteration, we saw a slight growth in participation from the West coast organizations.

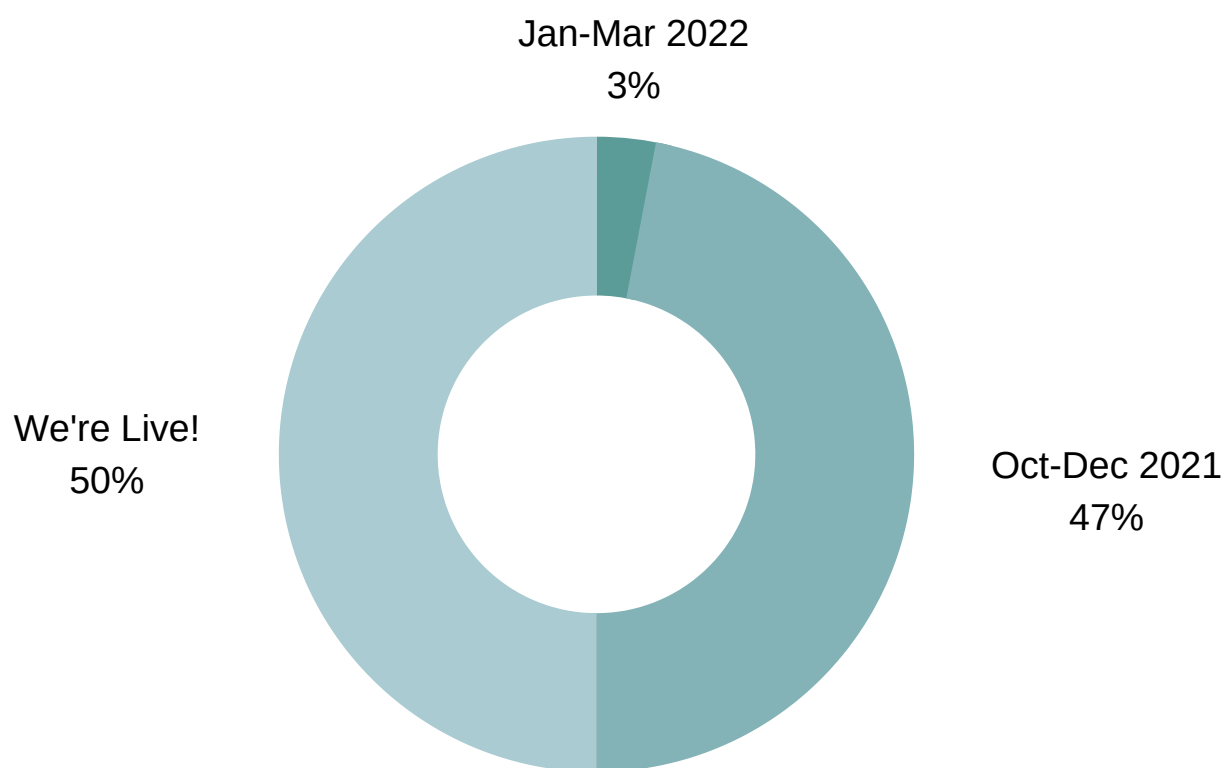
GENRES

Along with the regions, we have a strong representation amongst the different genres of arts organizations. Performing Arts Centers and Theaters made up 65% of overall respondents. Dance/Ballet, Orchestra/Symphony, and Operas remained flat at 16% of respondents since our prior report. Finally, the “Other” category grew by over 171%. These are defined as Museums, Education Centers, Festivals, Arenas.



REOPENING

For the first time since March 2020, most arts organizations are reopening, welcoming in-person audiences. 50% of the organizations have already reopened while another 47% are reopening this fall (October - December 2021) to take advantage of the holiday season ticket sales. This leaves just 3% of organizations looking at early 2022 reopen date. Based on the survey responses, all organizations are moving forward with reopening plans no later than March, 2022.



This is a significant shift since our [prior report](#) in March 2021, where only 68% of organizations had reported they would be live by October - December 2021. In general, there is a better sense of certainty regarding how the arts community can and will welcome back their audiences.

ORGANIZATIONAL PRIORTIES

As organizations plan for reopening, one of the key questions is how organizations are planning to engage with their patrons. 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.



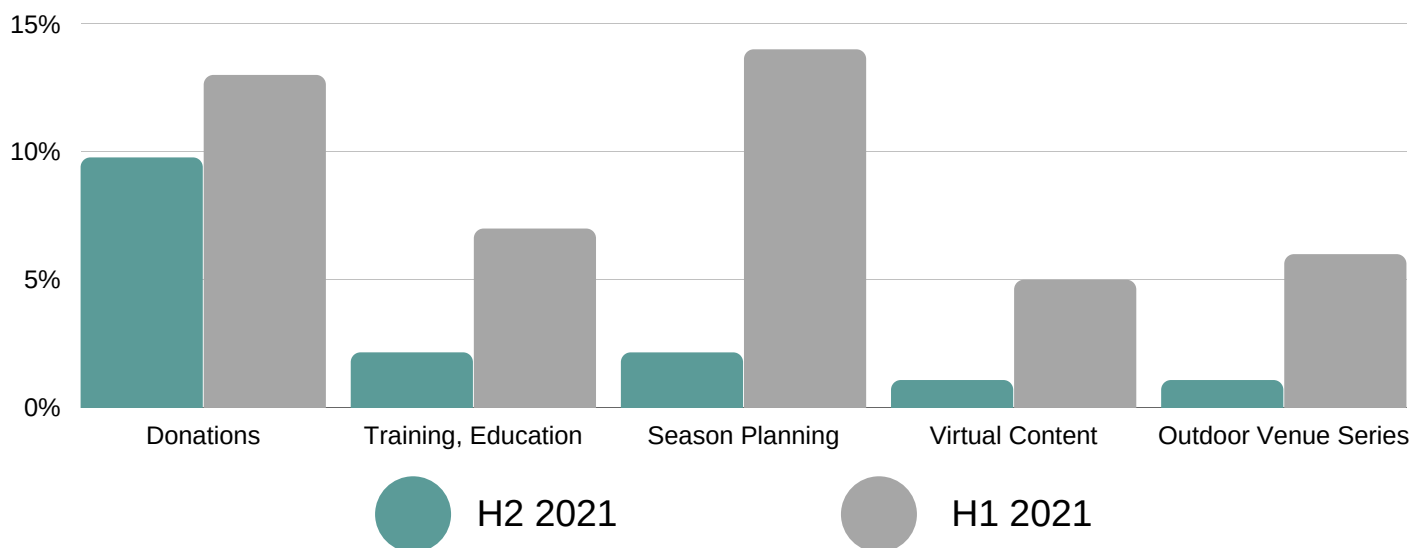
KEY LEARNINGS

- The top priority for respondents was focusing on single-ticket sales at 24%
- 16% are focusing on engaging their loyal audiences
- 11% are focusing on setting and communicating safety precautions to best support in-person audiences
- 53% of respondents said they were prioritizing single-ticket sales (24%), season ticket sales (11%), donations (10%), and subscriptions (8%)

ORGANIZATIONAL PRIORTIES CONT'D

In this half of the year, organizations are shifting focus away from some of the additional revenue streams they had been focusing on throughout the pandemic. Organizations deprioritized donation, training, education, virtual events, and outdoor events, instead focusing on ticket sales and subscriptions for in-person events.

Organizational Priorities Change over Time

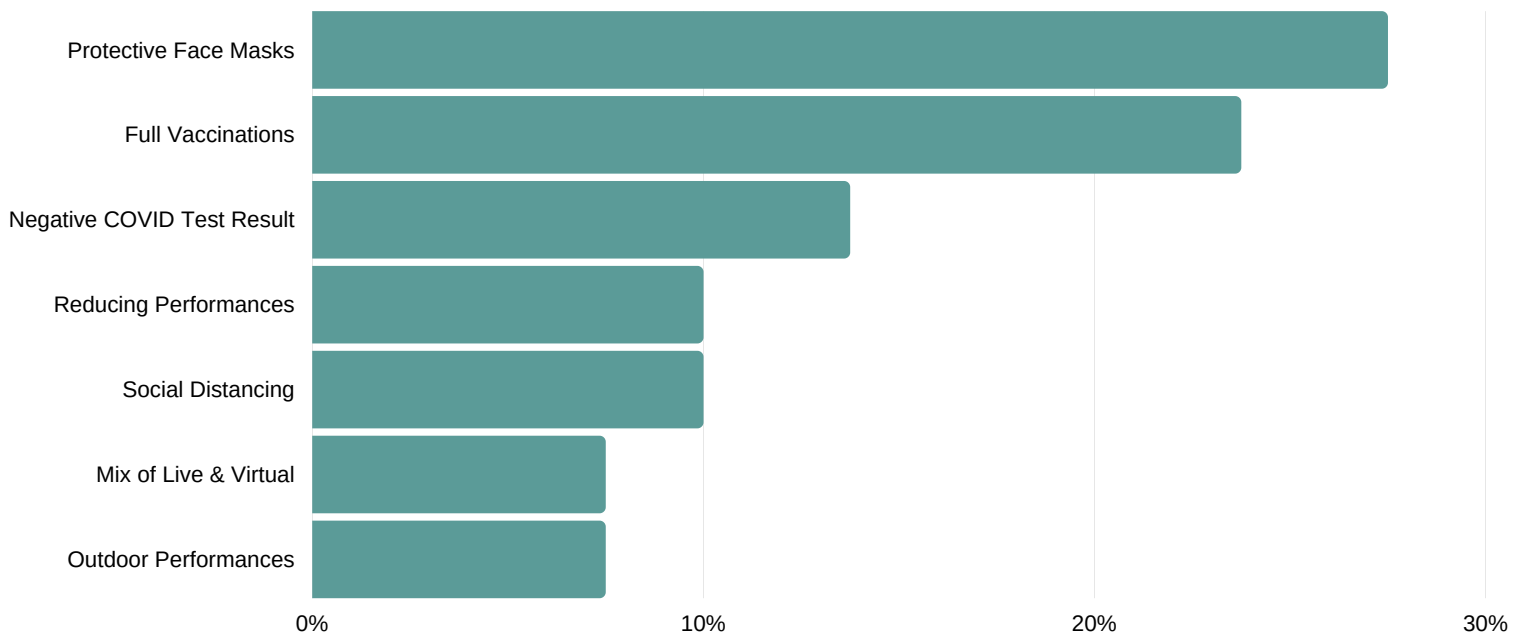


KEY LEARNINGS

- Drop in organizational priorities since early 2021 in donation (-3%) and education & training (-5%) year over year
- Shift away from augmented revenue streams like virtual content (-4%) and outdoor events (-5%) year over year
- Move away from season planning (-84%), as the organizations focus on single ticket sales (+500%) year over year

SAFETY REQUIREMENTS

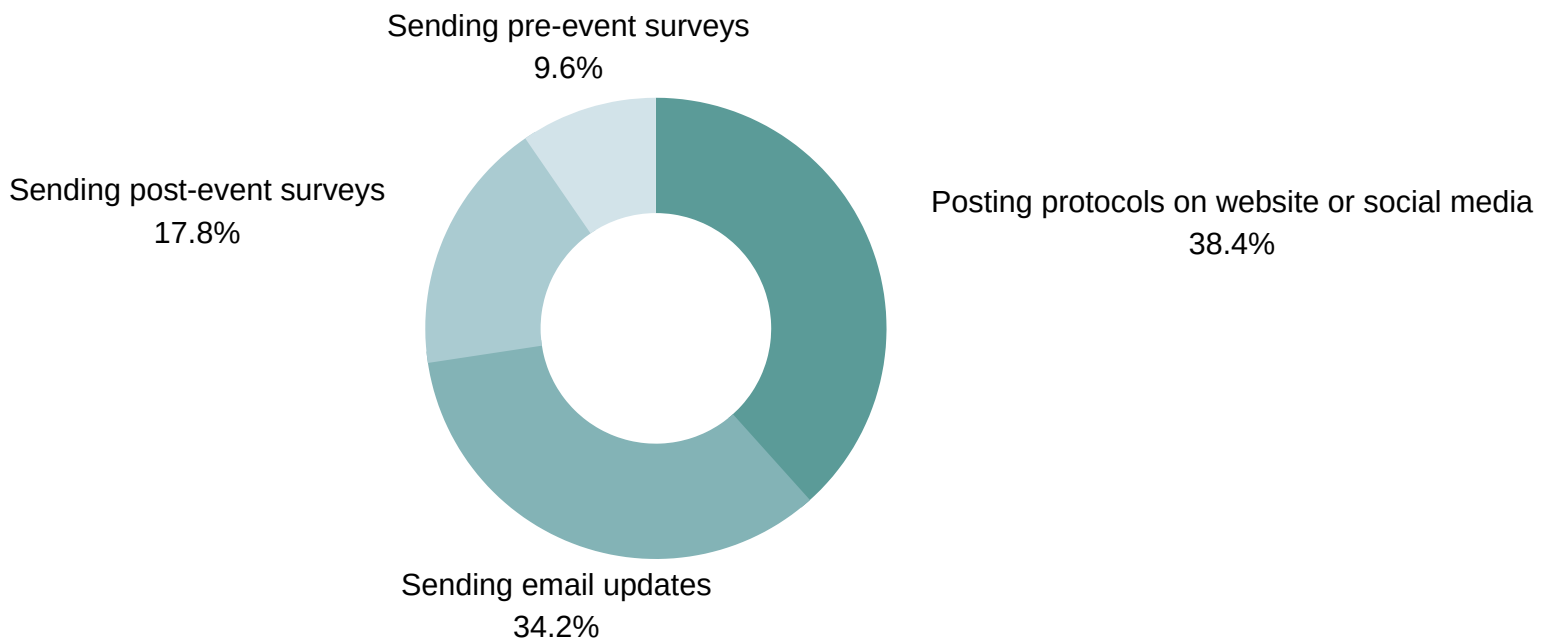
Safety requirements and standards are a big consideration on how arts organizations will reopen. In a conversation earlier this year with TRG Arts, one trend arts organization's top consideration when reopening is health and safety standards ([Reopening with TRG Arts Webinar, 2021](#)). Arts organizations have been faced with the challenge of how to balance state or local regulations for safety with their patrons' desires to feel safe as they attend in-person events again. Half of the battle for the arts community is to decide which safety procedures to adopt. 27% are requiring face masks, 24% full-vaccinations, and 14% a recent negative COVID test.



The survey received some write-in responses as well. Some arts organizations have state restrictions around safety mandates including masks or requiring proof of vaccination. These organizations are reporting they are operating at full capacity while following local guidelines and regulations. Another consideration is some organizations are requiring (where possible) staff to be fully vaccinated to help protect both the staff and patrons. There were a couple of organizations that reported they were still deciding and refining their safety procedures. All that being said, safety and community guidelines are a big area of focus for arts organizations and patrons as they consider attending live events.

COMMUNICATIONS STRATEGY

While establishing clear safety standards was a top initiative for arts organizations, communicating these protocols to their patrons was another key theme.



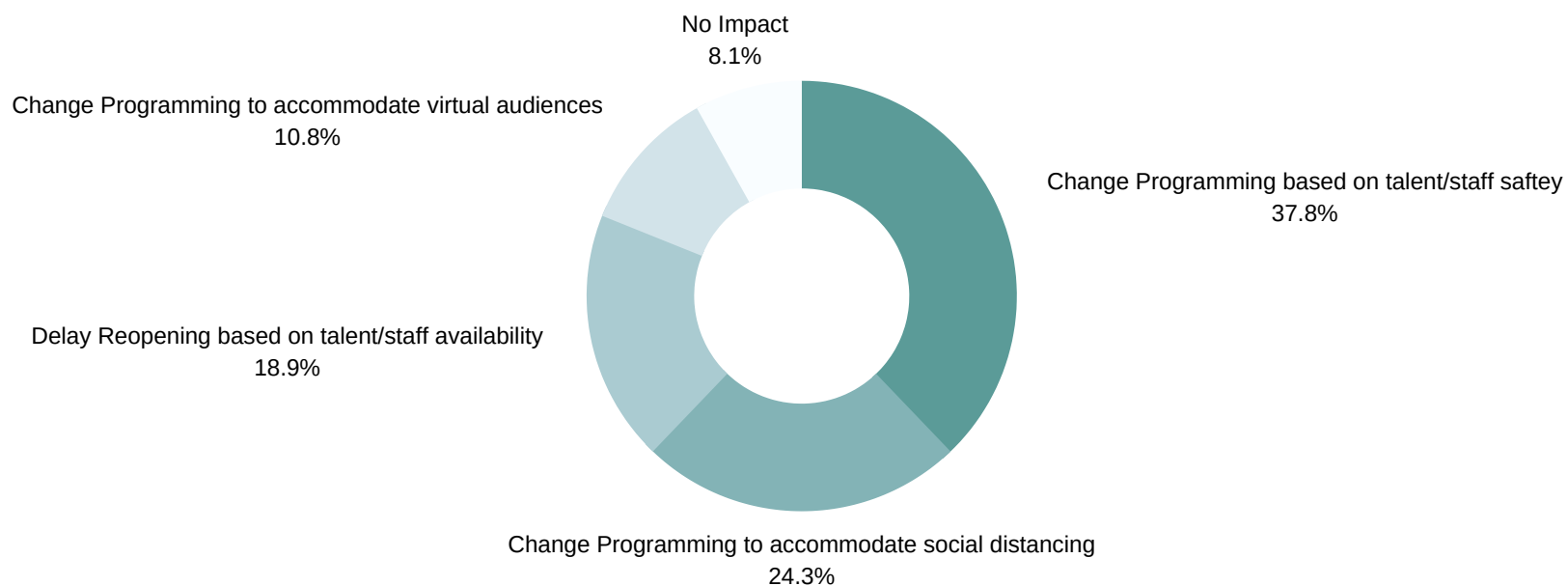
Communicating the safety policies are important to engaging and encouraging patrons to return to in-person events. In fact, building out a communication and content plan is going to be key in helping to engage your audiences ([Tessitura: 2021](#)). Streamlining communication helps eliminate and minimize confusion and manage patron expectations so that everyone can enjoy their experience.

KEY LEARNINGS

- **38% are posting these policies on their website or social channels**
- **34% are communicating through emails**
- **17% are following-up attendance via surveys on audience experience**
- **10% are sending pre-event surveys to understand audience preferences**

PROGRAMMING IMPACTS

These safety considerations also had an impact on programming. Arts organizations had to consider any safety and programming decisions through multiple lenses including their patrons, talent, staff, and venue requirements, just to name a few. It was important to understand how these decisions around reopening and safety impact their programming. Here are the results:

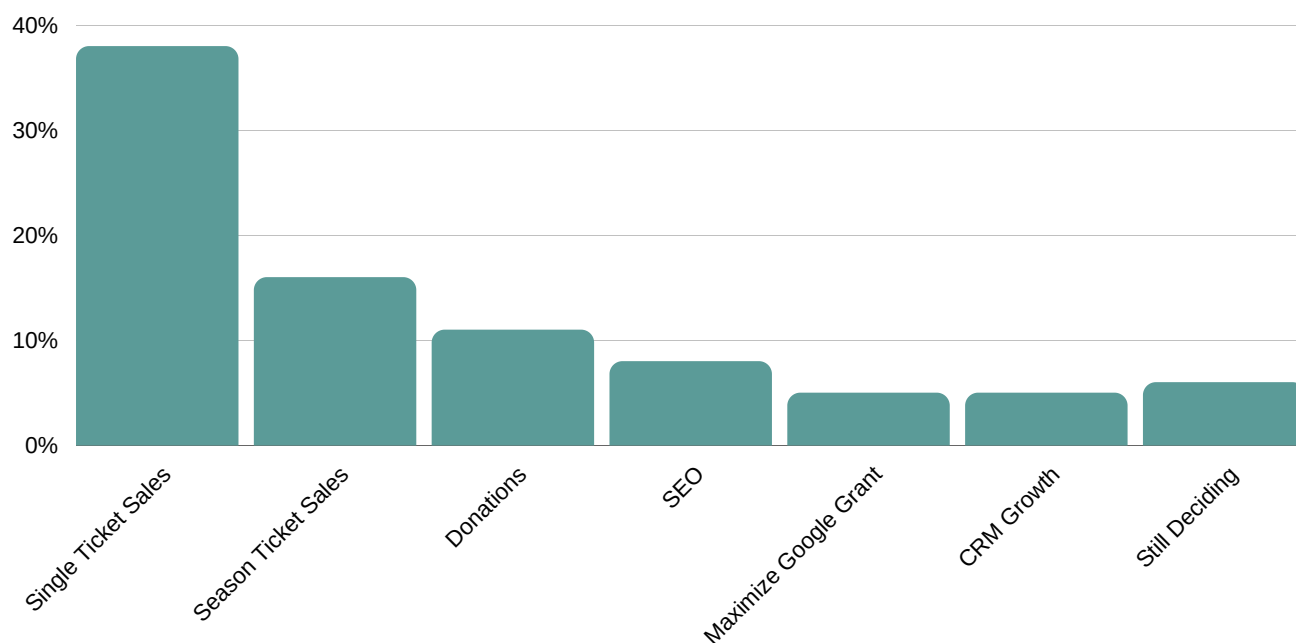


KEY LEARNINGS

- **38% of organizations had to change programming based on talent and staff safety requirements**
- **24% changed programming due to socially distance seating**
- **18% had to delay reopening due to staff and talent availability**
- **11% changed programming to best support virtual audiences**
- **8% reported no impact to their programming**

MARKETING PRIORITIES

As arts organizations focus on revenue driving initiatives, marketing departments are mirroring their organization's priorities. We see that Single Ticket Sales, Season Ticket Sales, and Donations are the top marketing priorities for our arts partners. We are seeing similar goals as past survey reports from 2020 and 2021 to maximize non-paid channels like Google Grants and SEO. CRM growth also remains one of the top areas of focus.



KEY LEARNINGS

- 65% of marketing organizations are focused on driving revenue
- 13% are focused on maximizing Google Grants and SEO
- 5% are driving CRM growth
- 6% are still undecided on what their marketing priorities will be

MARKETING PRIORITIES BY GENRE

While each genre has its areas of focus; single ticket sales, [subscriptions](#), [donations](#), and loyal audience engagement are the clear priorities for arts organizations this year.

	DANCE/ BALLET	MULTI-GENRE PAC	OPERA	ORCHESTRA/ SYMPHONY	THEATRE	OTHER
PRIORITY #1	Single Ticket Sales 34%	Engaging Loyal Audiences 28%	Single Ticket Sales 34%	Single Ticket Sales 33%	Single Ticket Sales 21%	Balancing New Roles & Responsibilities due to Staffing 33%
PRIORITY #2	Donations 24%	Single Ticket Sales 25%	Safety Precautions & Preparations for in-Person Events 33%	Season Ticket Sales & Donations 22%	Engaging Loyal Audiences 15%	Single Ticket Sales & Donations 22%



MARKETING INITIATIVES & OUTREACH

Marketing teams are supporting these efforts by developing messaging around in-person events and outreach strategies to engage their audiences. Content development, email marketing, and paid as well as organic digital engagement are strategies to drive communication and awareness around single ticket sales. Here are the key marketing priorities by genre:

	DANCE/ BALLET	MULTI-GENRE PAC	OPERA	ORCHESTRA/ SYMPHONY	THEATRE	OTHER
PRIORITY #1	Promoting Upcoming Events 21%	Email Marketing, Promoting Upcoming Events, & Paid Media 16%	Video & Promoting Upcoming Events 33%	Promoting Upcoming Events 31%	Promoting Upcoming Events 23%	Content Development 27%
PRIORITY #2	Email Marketing 17%	Organic Social 11%	Onboard New Platforms 13%	Content Development 21%	Content Development 11%	Public Relations & CRM Growth 18%

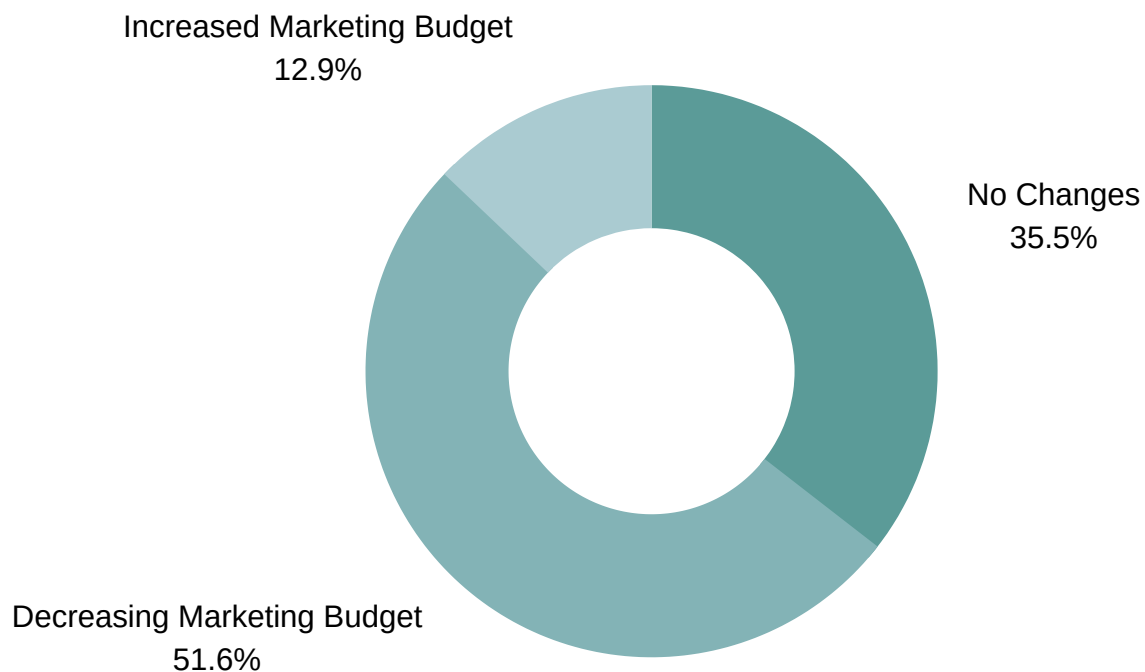
KEY LEARNINGS

- 22% of all organizations are prioritizing promoting their upcoming events
- 17% are going to lean into email marketing to capture and engage their CRM and loyal audiences
- 11% are prioritizing content development and 11% are focusing on paid media support to promote both their content and their upcoming events

MARKETING BUDGETS

Marketing departments are expecting an impact to their budget. These impacts will shape their investment and resource allocation strategies.

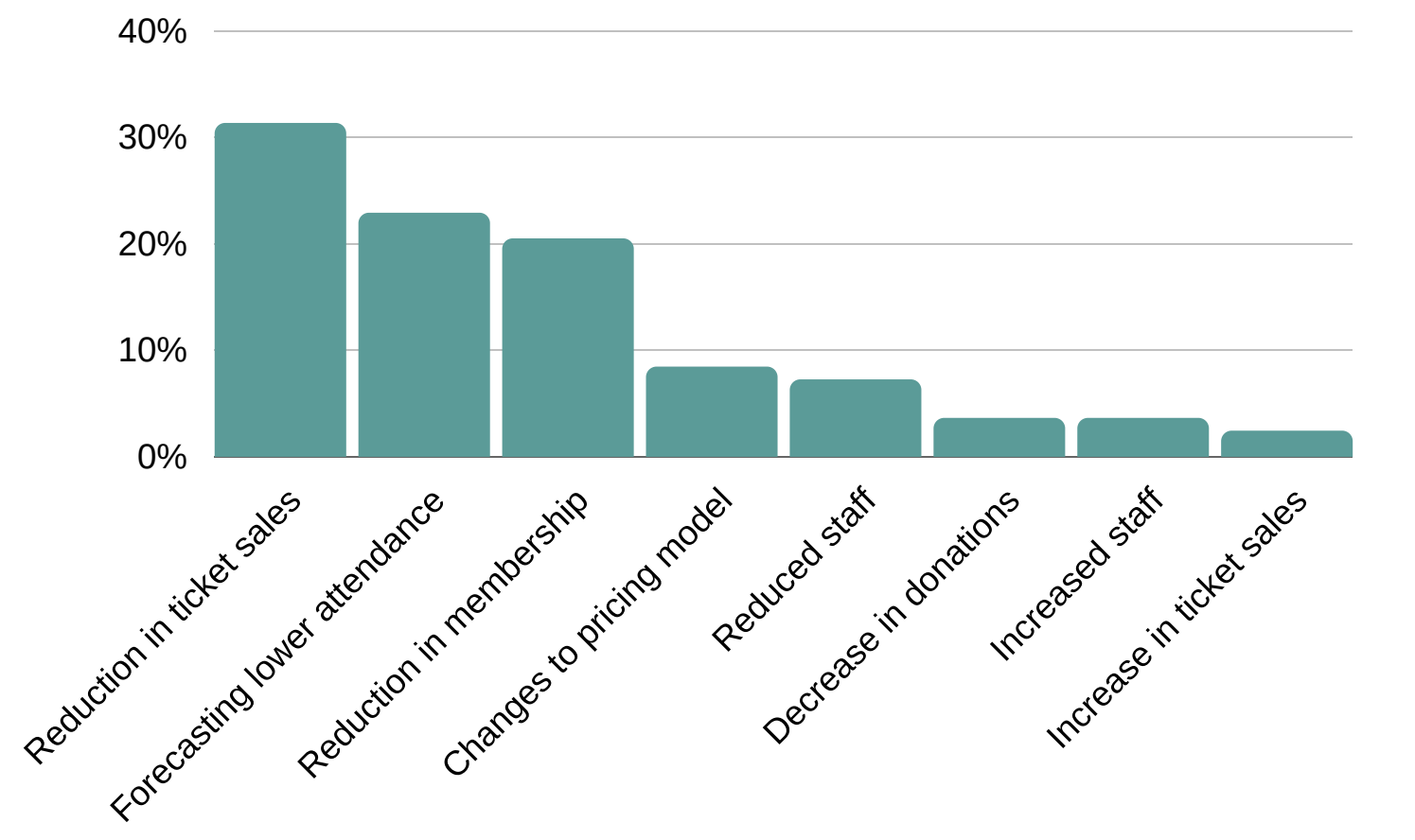
- 52% of organizations do expect decreased marketing budgets
- 36% are expecting no change year over year
- 13% are anticipating an increase to their marketing budgets now that live events are back



MARKETING BUDGETS

CONT'D

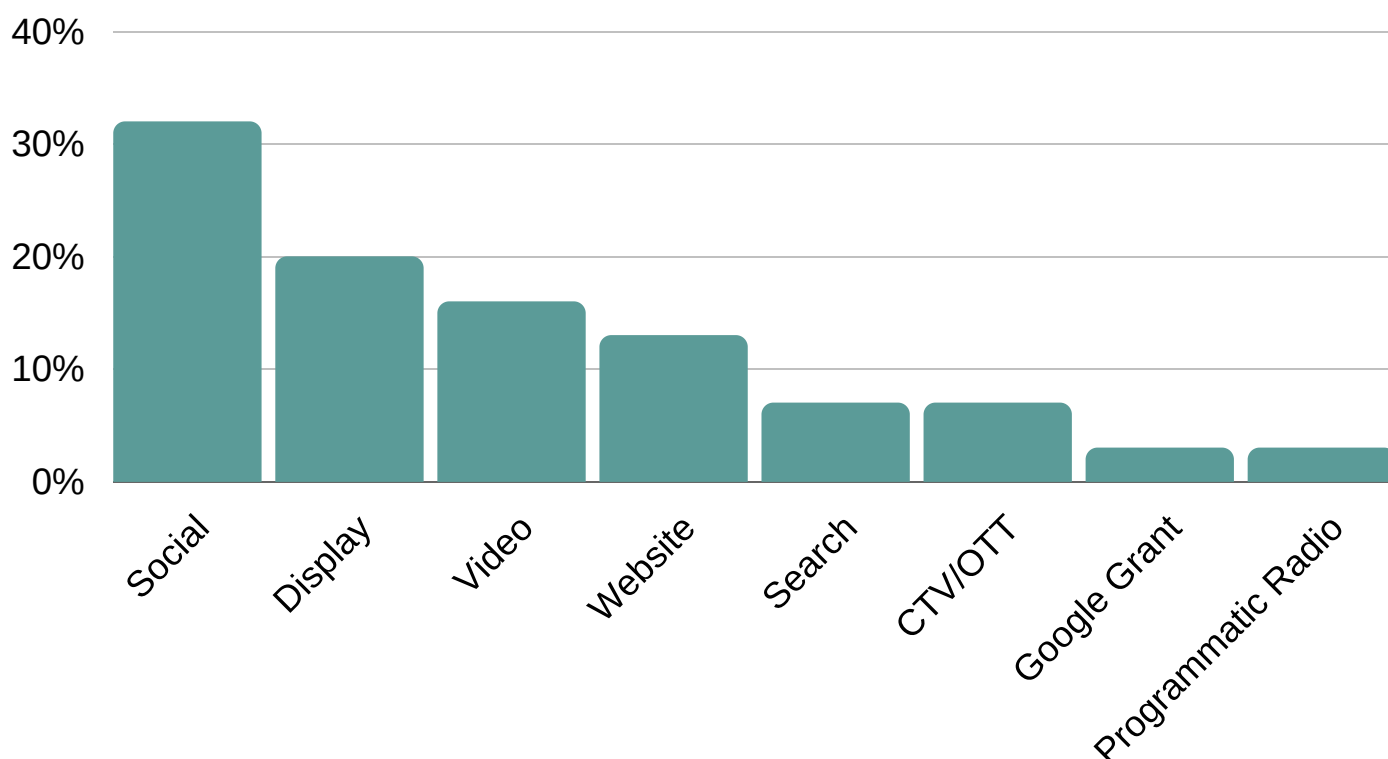
As most are expecting either lower or static budgets, understanding how arts organizations were approaching budget planning gives insight into how these organizations will be impacted this year. 31% planned on a reduction in ticket sales this year vs. FY 20-19. Another 23% are forecasting lower attendance due to seating capacity restrictions and another 21% planned on a membership/subscription decrease.



That being said, there are some organizations who planned for an increase to their staff at 4% and an increase in ticket sales and donations at 2%. While most organizations took a conservative approach to planning and budgeting, there are notes of optimism and growth in the survey responses. So this year will be a building year to give the arts community the foundation for long term growth and recovery.

MARKETING INVESTMENTS

With budget considerations, the arts have to be strategic in their marketing investments to drive growth for their organization. Leaning into social media, display, video, and website are all going to be a big part of their investment strategy. 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 #1 across all genres with a 1.6x lift over any other strategy**
- **Display (20%), Video (16%), and Website (13%) round out the top investment strategies**
- **Search (7%) and Google Grant (3%) both dropped in priority from earlier this year**
- **Connected TV/OTT doubled as an area of focus, which might be a good area for organizations to keep an eye on!**

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:

SHARE HEALTH & SAFETY PROTOCOLS

- Share what safety standards your organization is adopting via your website, social posts, and emails to your audience
- Survey patrons either before an event to understand their concerns and expectations and/or after an event to gain valuable feedback to adjust your in-venue experience to make patrons feel safe ([Tessitura: 2021](#))

CONNECT WITH THE ARTS COMMUNITY

- Lean into the arts community to learn from others, seek advice, or get another perspective on planning and reopening
- In fact, 83% of organizations are actively communicating and collaborating with peer arts organizations on how to navigate reopening, planning, budgeting, etc.



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 find ways to prepare to reopen.

Arts organizations have taken this year to build out their programming, reopening plan, as well as forecast budgets and craft their go-to-market strategies. This has enabled many organizations to welcome audiences back to their venues.

For the first time since March 2020 arts organizations are sharing a sense of optimism and excitement in welcoming patrons back. In looking forward, there is still opportunity for the arts community to come together and share their experiences and successes with each other as well as establish and communicate clear health and safety protocols. Our goal with this whitepaper has always been to spur conversations and share insights and strategies to support arts organizations and their planning. We hope that something in this report inspires your team, sparks an idea, or fuels a conversation that can better support you, your department, or your organization.

For further discussion, we invite you to listen in on our [Arts Innovation Webinar Series](#), where we host conversations with organizations and partners who are working through strategies to help bring the arts to their communities.

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

