

2014 Performing Arts Digital Marketing Benchmark Study

Market research data from over
125 performing arts organizations

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Introduction

This is our third *Performing Arts Digital Marketing Benchmark* survey and we are so happy that more than 125 organizations took the time to fill it out. While 125+ organizations do not make this data statistically significant, it does provide very strong indicators of where our industry is with digital marketing practices. I'd like to call out three trends from the data:

Arts organizations are more social.

100% of organizations have Facebook accounts and 97% of organizations are paying for Facebook advertising. 81% of organizations now have an Instagram account and most are posting a few times a week. Instagram followers of arts organizations have more than doubled year over year, and Facebook and Twitter followers have also significantly increased across the board. Far more organizations are checking their social insights regularly and almost half of organizations are meeting at least once a month to discuss social results.

Arts patrons are more mobile, although many organizations are not.

59% of surveyed organizations see at least a quarter of their website traffic coming from mobile devices (versus 24% just a year ago). However, only 61% of organizations have a mobile or mobile optimized site (many indicate they are planning to build one). While audiences are more mobile, only about half of organizations indicate that they are purchasing mobile advertising.

Most arts organizations are spending more on digital efforts, but limited budgets driven by a lack of comprehensive strategy, leadership support, and internal skills are still a major problem for many.

The good news is many organizations are more focused on digital marketing. About half are allocating at least 21% of paid media budgets to digital, up from one third of organizations in 2013. Many organizations are also investing more on their websites. Spending on major and minor website upgrades is up across almost all budget sizes.

The bad news is that a lack of leadership support and internal knowledge is limiting progress for many organizations. For the third year in a row, respondents indicated that “not enough budget” is the biggest obstacle for digital marketing success. This is most likely a symptom of internal limitations.

We saw a jump in organizations indicating that “not enough internal knowledge,” “no clear digital strategy” and “no leadership support” hurt digital efforts. The most disheartening was an increase from 18% to 25% in the number of organizations listing “no leadership support”.

The only way arts organizations will thrive in the digital age is if our leaders recognize the importance of digital communications, fund the hiring and training of skilled employees, and invest in the infrastructure organizations need to succeed. The world is getting more digital every day, and I hope this survey can help inform and bolster the field's digital strategy and investment.

Erik Gensler
President
Capacity Interactive

Key Findings

Paid Digital Media

- 44% of organizations spent at least 21% of their total paid media budgets on digital marketing, up from 10% in 2012 and 34% in 2013.
- 97% of arts organizations were investing in paid Facebook advertising. 66% were purchasing retargeting banners.
- Arts organizations still indicated lack of budget as the biggest obstacle for digital marketing success, with “determining ROI” as a close second.

Social Media

- Facebook and Twitter continued to be the preferred social media platforms, followed by YouTube and Instagram .
- 80% posted at least once a day on Facebook, about 60% posted daily on Twitter.
- Most organizations saw Instagram followers double in the past year and 25% now post at least once a day.

Analytics

- Across three years of data, Google Analytics remained the most popular web analytics tool, but 91% indicated they believed they were not using web analytics to its full potential.
- 41% of organizations had e-commerce tracking set up on analytics platforms.
- 53% of organizations reviewed web analytics reports at least once a month, but 37% never met to discuss web analytics results.

Mobile

- 59% of organizations saw at least a quarter of their site traffic from mobile. About half purchased mobile advertising.
- 61% of arts organizations had mobile enabled sites in 2014 and 28% were planning on building one.
- 68% offered the ability to purchase tickets on their mobile site in 2014.

Website

- On average, arts organizations sold 52% of their tickets online.
- 26% redesigned their websites within the past year, 75% within the past 3 years, and 24% were currently redesigning their website.
- 56% of arts organizations continued to indicate they did not have adequate budget to cover their website maintenance needs.

Email

- Arts organizations were conservative on how often they emailed constituents. 65% still sent one email per week, or fewer, to their constituents.
- 90% of arts organizations reported that email collection was extremely important to their organizations.
- While both general and targeted emails saw an increase in open rates, targeted pre-show and post-show emails had the highest open rate of 49%.

Paid Digital Media

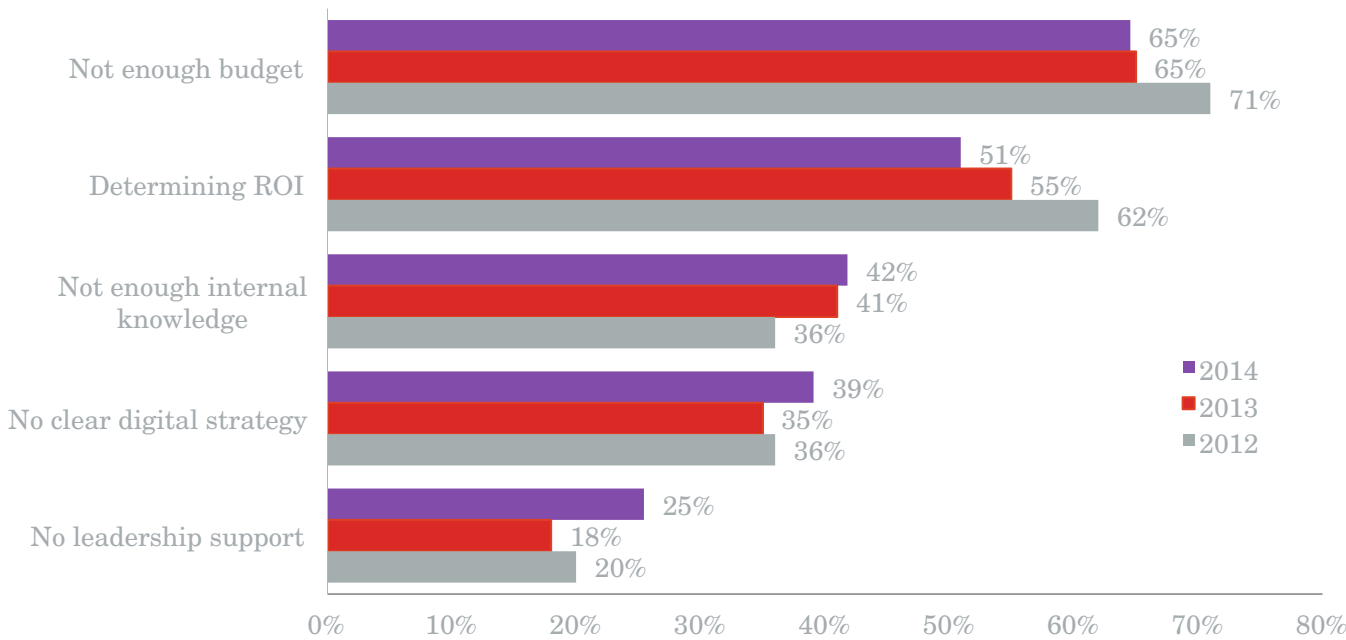
For three consecutive years, respondents indicated that the biggest obstacle for digital marketing success was lack of budget.

In 2014, 65% of arts marketers reported “not enough budget” as their biggest obstacle for digital marketing initiatives, consistent with the 2013 and 2012 survey results.

Additionally, about half of the participants still found determining ROI to be a substantial obstacle for digital marketing initiatives.

There was a general increase in recognition of the lack of internal knowledge, strategy, and leadership support for digital marketing initiatives, which are key to digital marketing success.

Biggest obstacles for digital marketing initiatives, 2012 - 2014

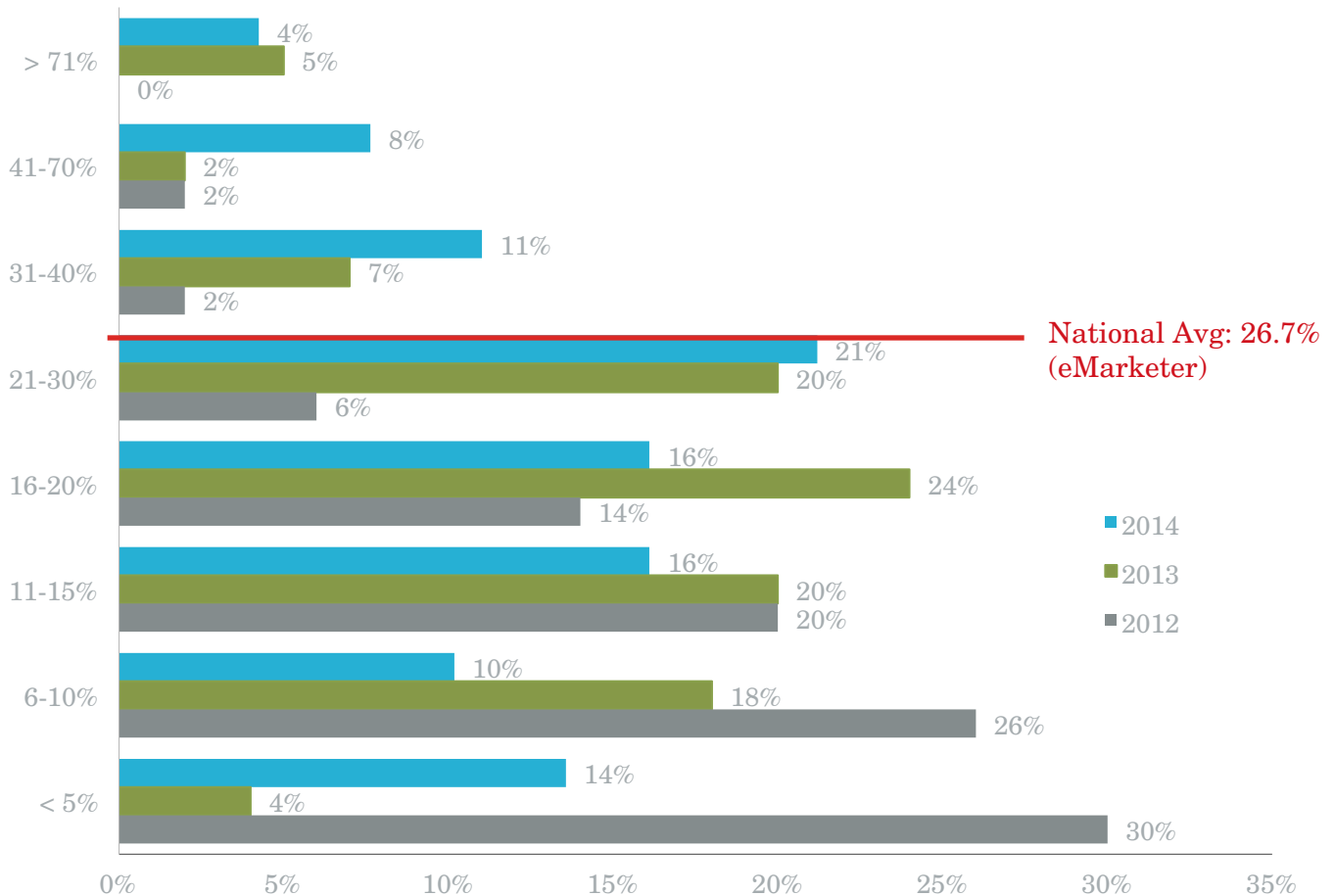


Paid Digital Media

In 2014, 44% of arts organizations spent at least 21% of their paid media budgets on digital advertising, compared to just 10% in 2012 and 34% in 2013.

However, more than half of arts organizations were still underspending on digital advertising compared to the national digital spending average from eMarketer.

Percentage of total paid media budget spent on digital media, 2012 - 2014

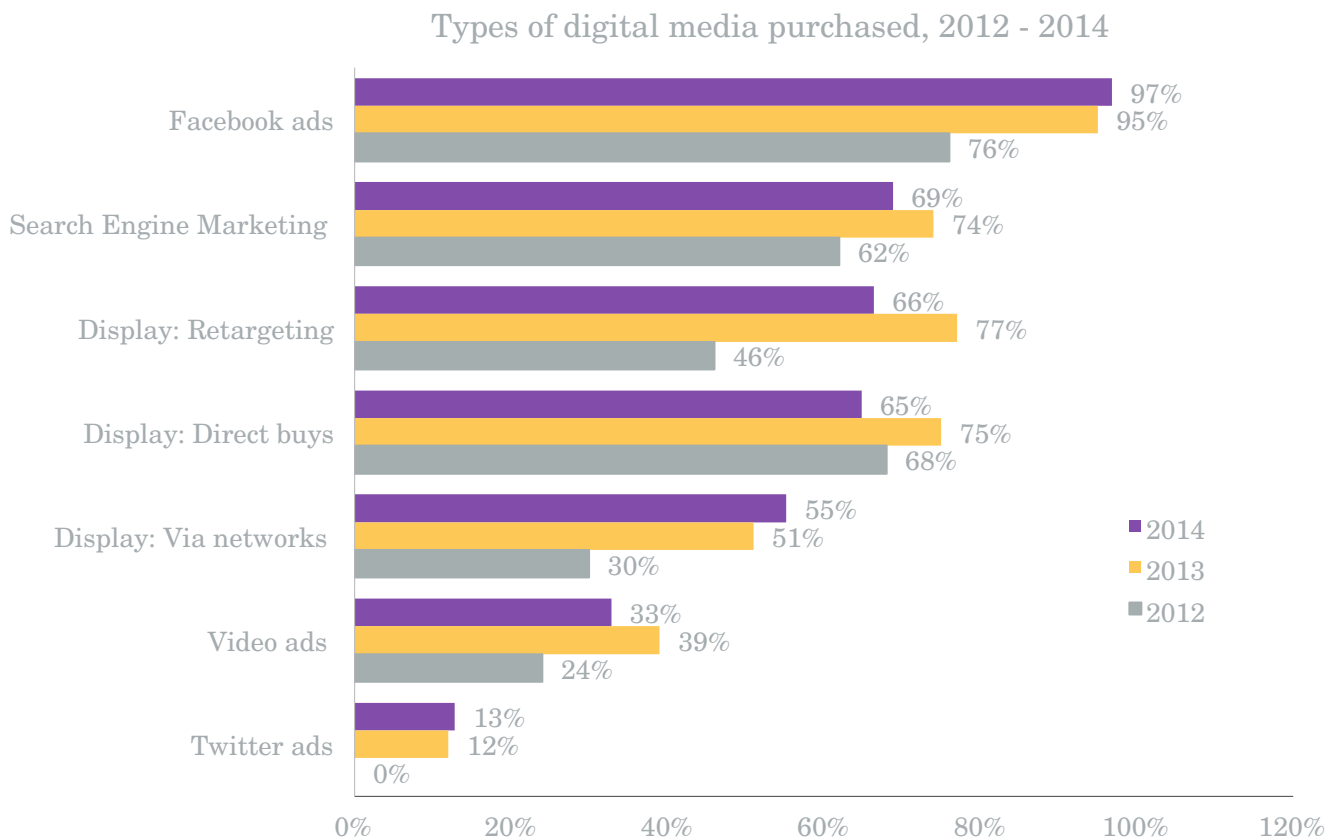


Source: <http://www.emarketer.com/Article/US-Total-Media-Ad-Spend-Inches-Up-Pushed-by-Digital/1010154>

Paid Digital Media

Facebook ads, display ads, and search engine marketing were the preferred digital advertising channels for arts organizations.

Almost all arts organizations (97%) indicated the use of Facebook ads. Almost 70% purchased search engine marketing and 65% purchased direct buys and/or retargeting via display.

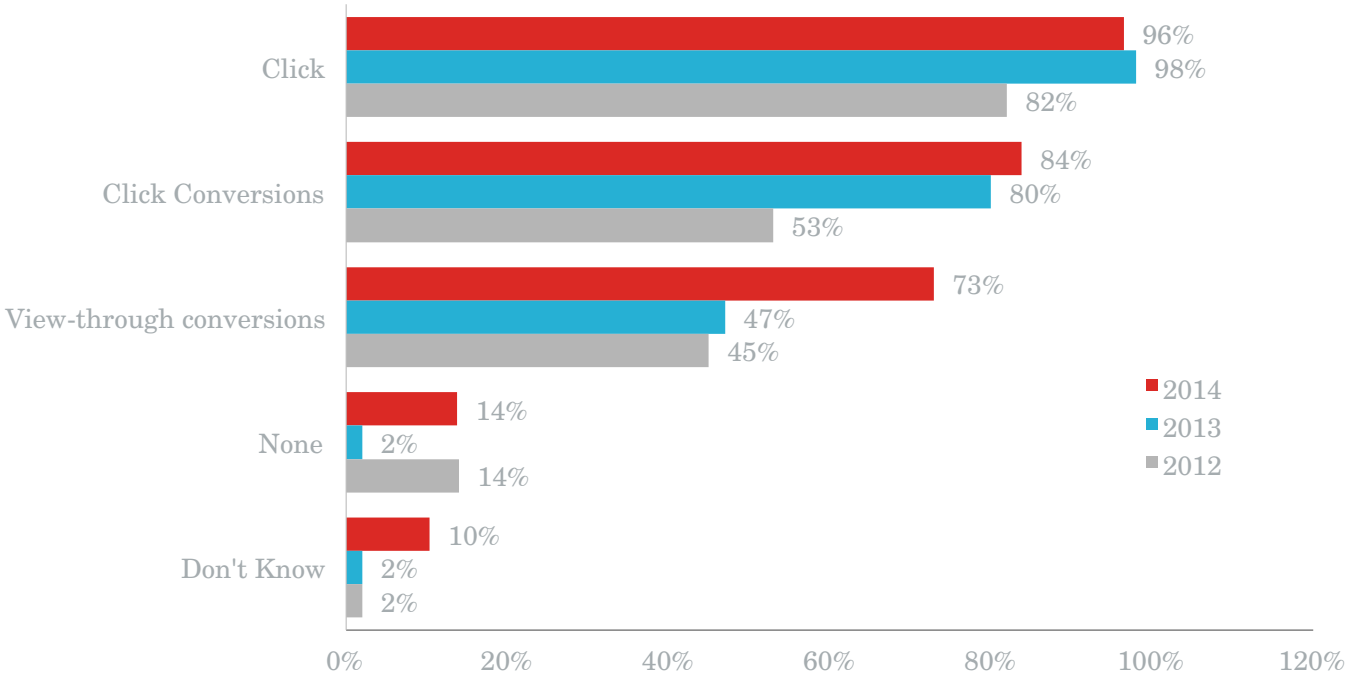


Paid Digital Media

More arts organizations were tracking view-through conversions.

Besides tracking clicks, 84% of arts organizations tracked click conversions and 73% tracked view-through conversions. However, 14% of arts organizations were not measuring paid digital media efforts.

How arts organizations tracked digital media, 2012 - 2014

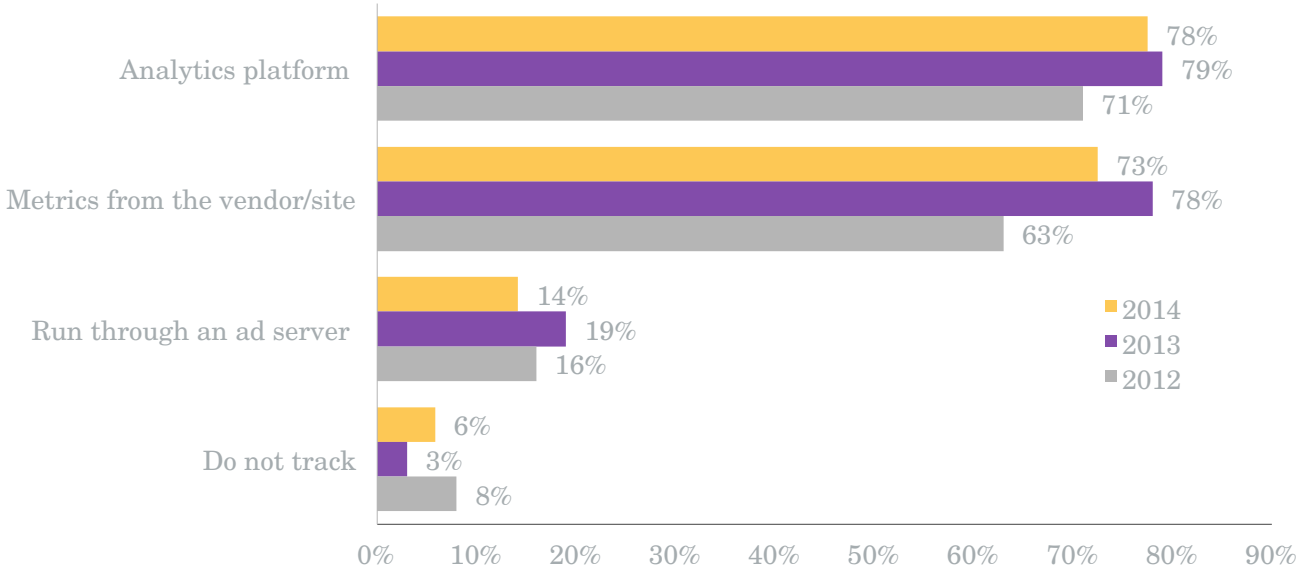


Paid Digital Media

78% of arts organizations used an analytics platform, such as Google Analytics, to track their paid digital media efforts.

73% tracked paid digital media campaigns with metrics from a vendor or site. Only 14% of arts organizations used a 3rd party ad server.

How arts organizations tracked paid digital media campaigns, 2012 - 2014

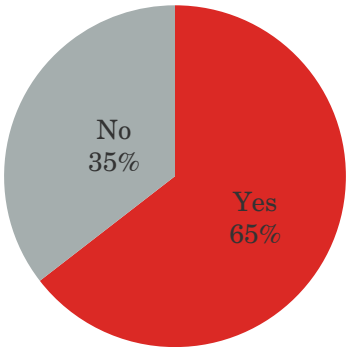


Paid Digital Media

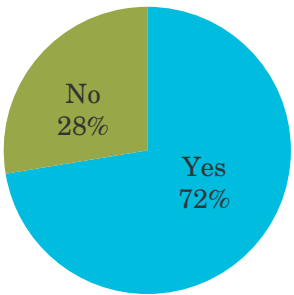
The majority of arts organizations continued to take advantage of free AdWords advertising through the Google Grants program.

Google Grants provides not-for-profit organizations with \$10,000 per month in free AdWords on Google.com. Still, one-third of arts organizations were not taking advantage of the free advertising offering.

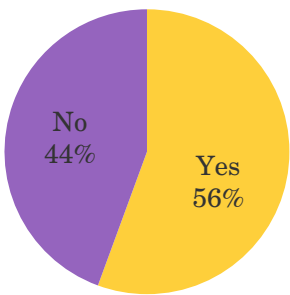
Percentage of arts organizations that used a Google Grant for AdWords advertising in 2014



Percentage of arts organizations that used a Google Grant for AdWords advertising in 2013



Percentage of arts organizations that used a Google Grant for AdWords advertising in 2012



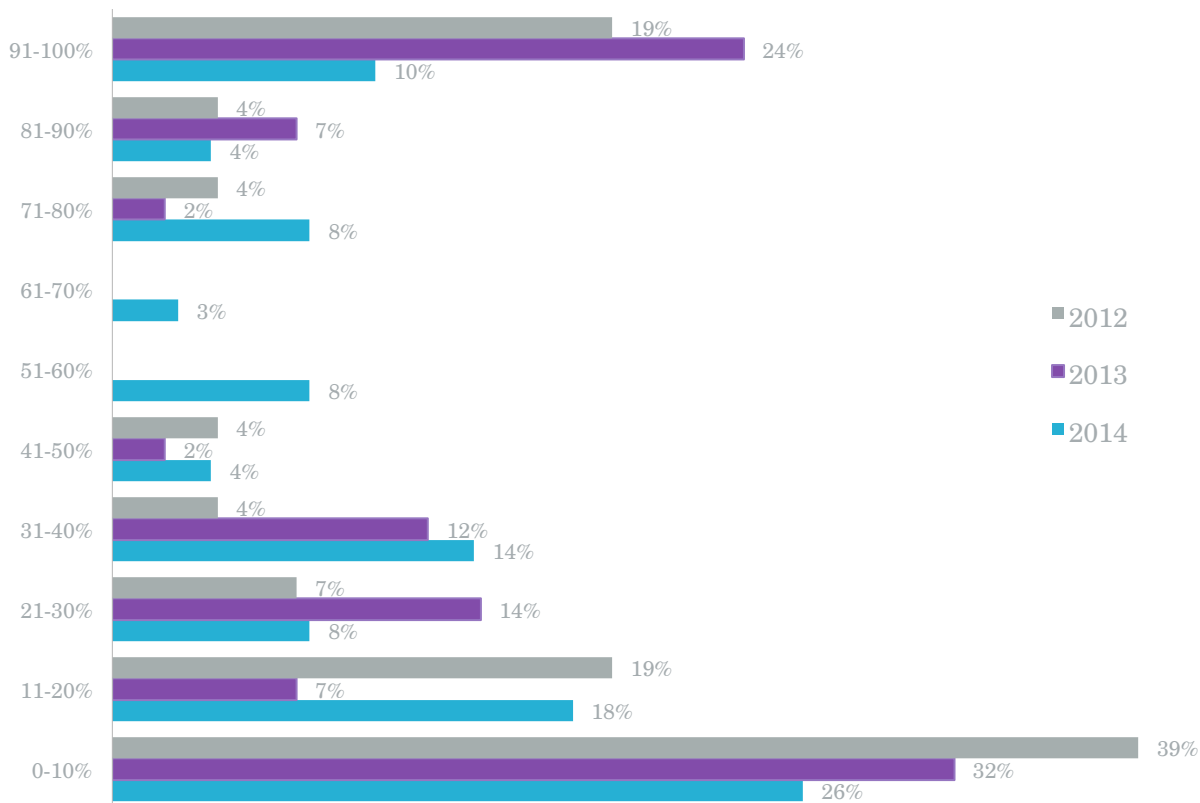
Paid Digital Media

Arts organizations were spending through more of their monthly Google Grant budget.

Compared to 2012, more organizations were spending larger amounts of the \$10,000 offered through their Google Grant. Only 26% of arts organizations spent less than 10%, as compared to 39% in 2012.

However, resources remained underutilized as half of the organizations surveyed spent 30% or less of their grant budget each month.

Average percentage of the \$10,000 monthly Google Grant budget used, 2012 - 2014



Of the surveyed organizations, only 8% applied for, or received, a Grantspro account in 2014.

The Grantspro program increases the Google Grant spend cap to \$40,000 per month. To be eligible, organizations must use at least \$9,900 of the monthly cap for a minimum of two months within the preceding six months.

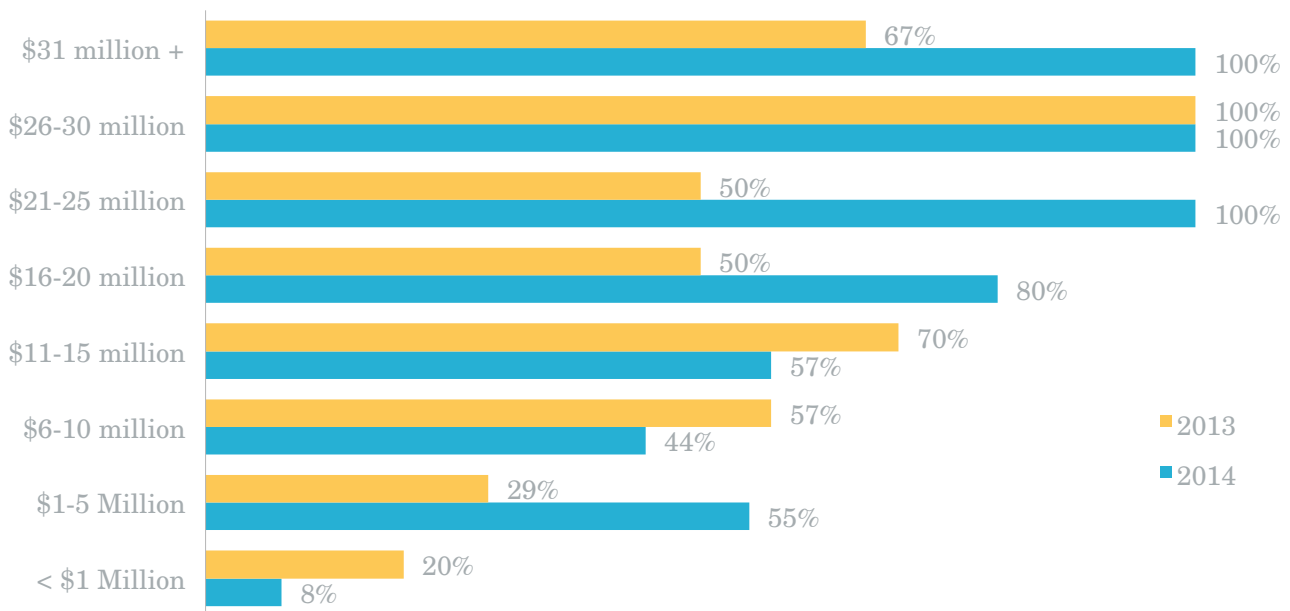
More information: <https://support.google.com/grants/answer/6022748?hl=en>.

Paid Digital Media

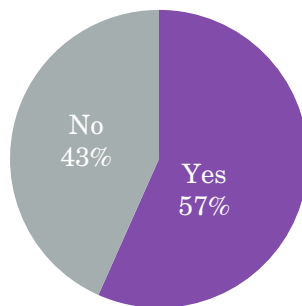
More arts organizations were using 3rd parties or agencies to assist with digital campaigns.

Larger organizations, in particular, were engaging 3rd parties.

Percentage of arts organizations by budget size that used a 3rd party, 2013 v. 2014



Percentage of arts organizations that used a 3rd party/agency to purchase any portion of their digital media in 2014



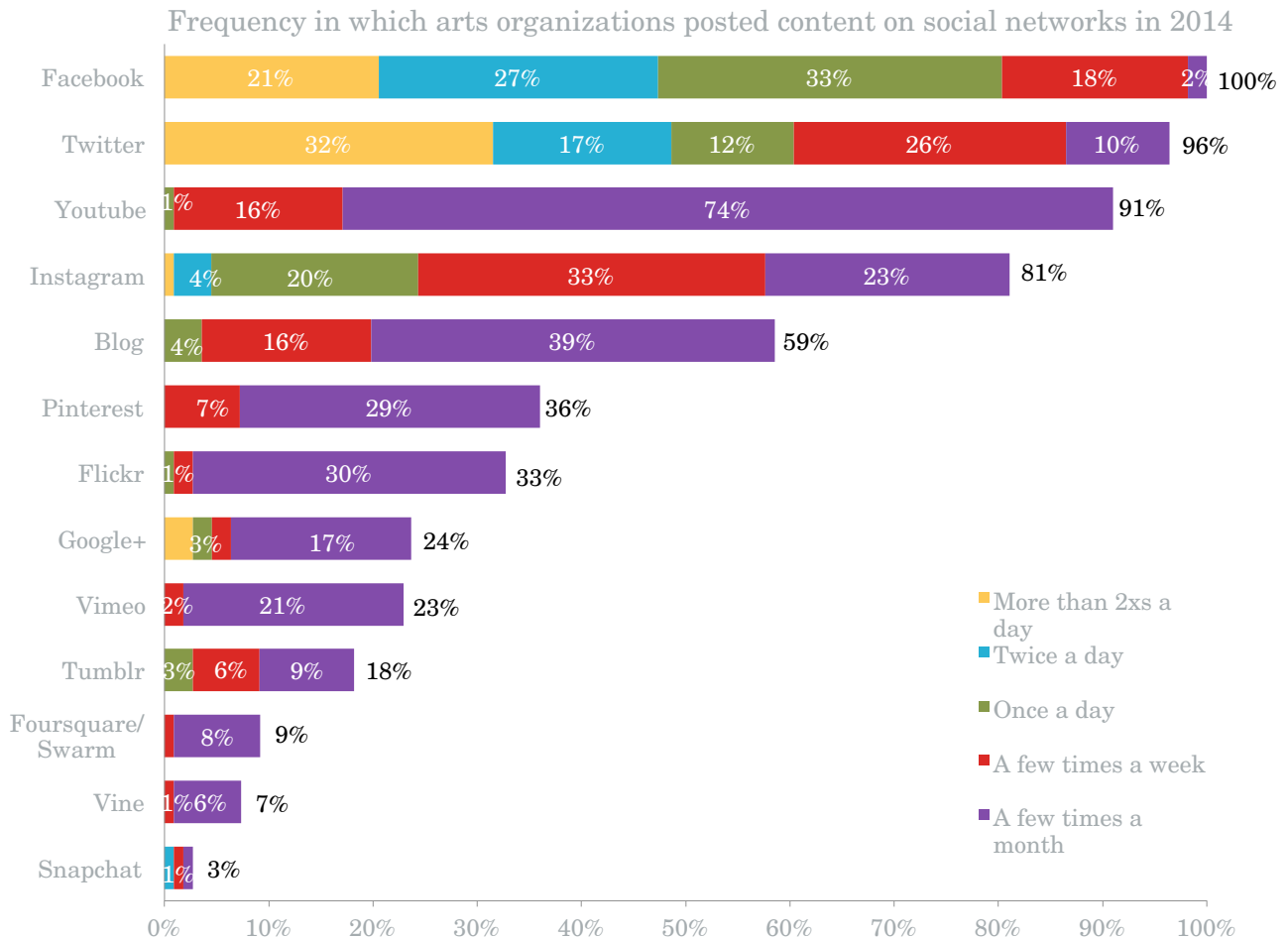
Social Media

Facebook and Twitter remained the preferred social media platforms amongst organizations surveyed.

In 2014, all of the participating arts organizations posted at least a few times a month on Facebook, and 21% posted more than twice a day.

96% of arts organizations Tweeted at least at few times a month and 31% Tweeted at least twice a day.

While 81% of arts organizations had an Instagram account in 2014, only 25% posted at least once a day.

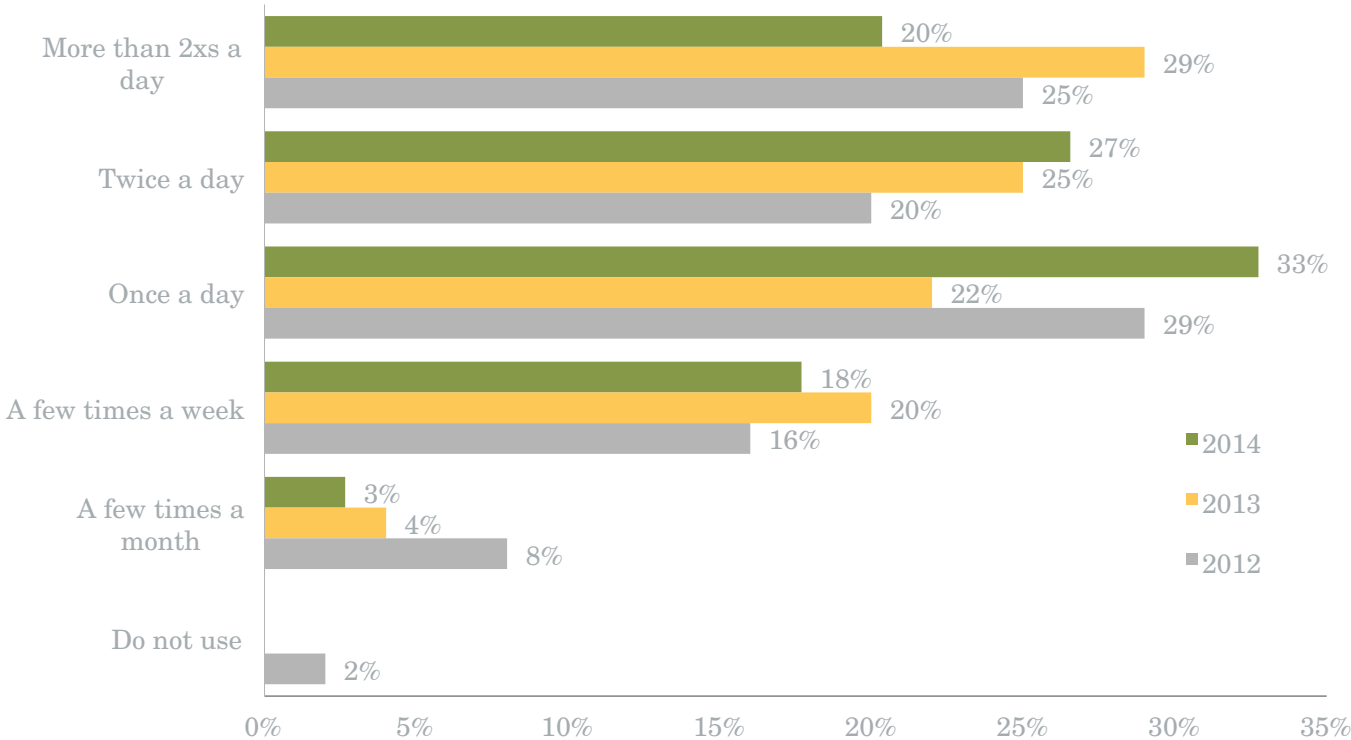


Social Media

Arts organizations were posting on Facebook more frequently.

80% of arts organizations posted at least once a day on Facebook, and 47% posted at least twice a day.

Frequency at which arts organizations posted content on Facebook, 2012 - 2014

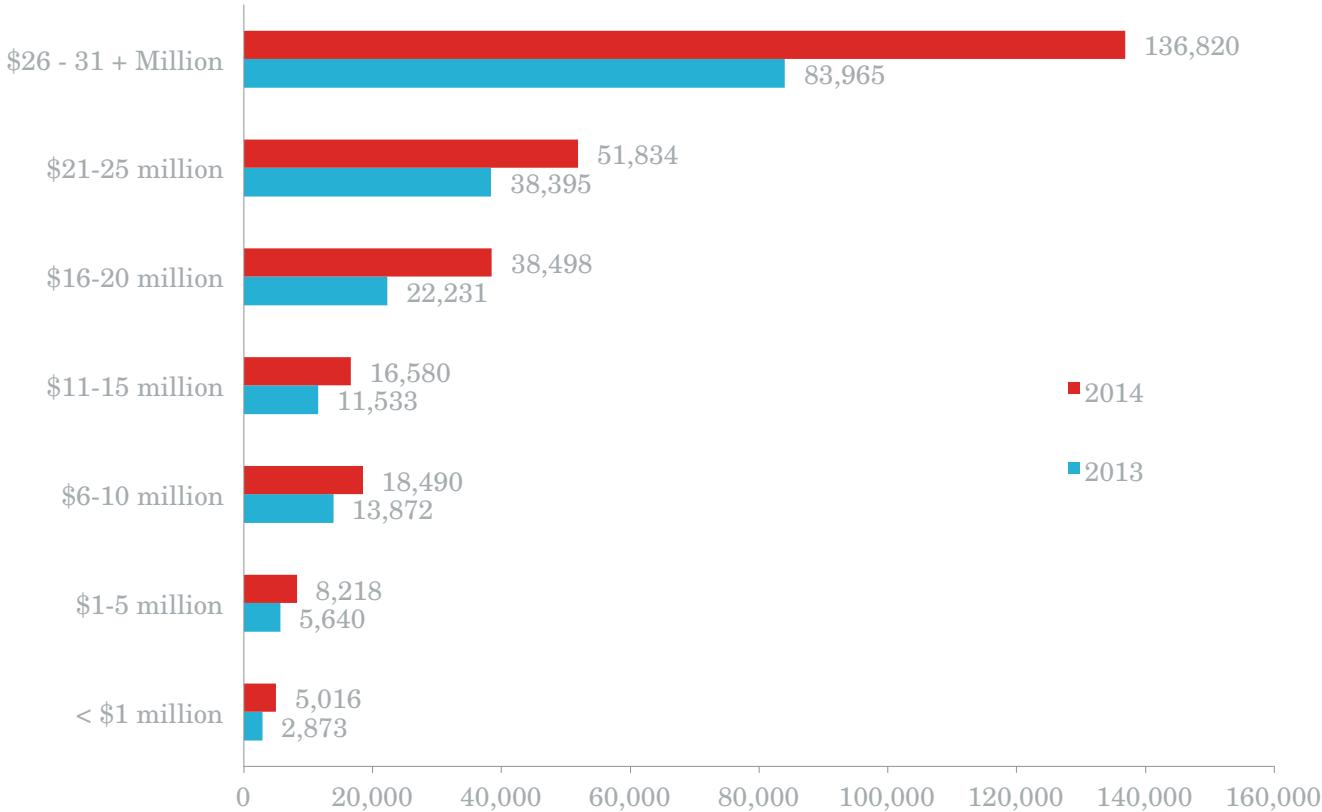


Social Media

Organizations of all sizes saw growth in Facebook fans from 2013 to 2014.

Organizations below a \$1 million operating budget saw the largest growth (75%).

Average number of Facebook fans by budget size, 2013 v. 2014

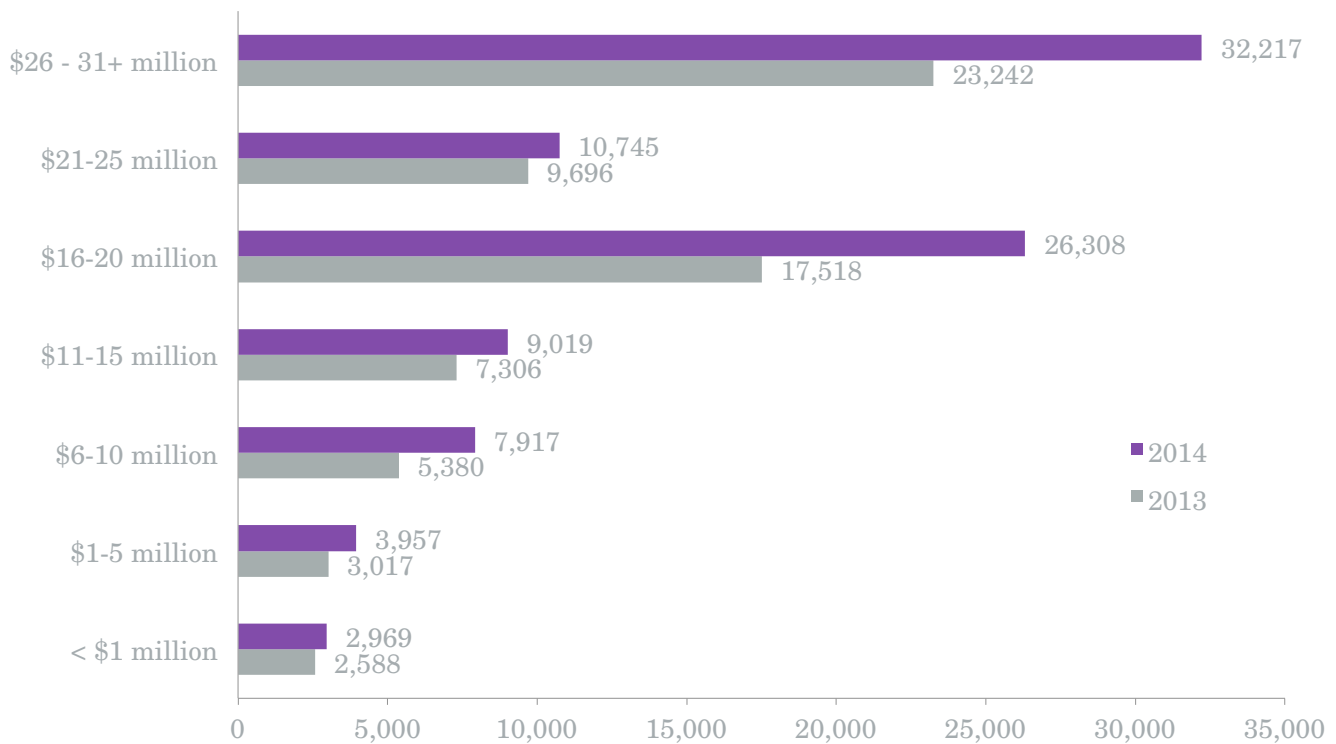


Social Media

Arts organizations of all budget sizes saw growth in Twitter followers from 2013 to 2014.

Arts organizations between \$16 – 20 million operating budget saw the largest growth in Twitter followers (50%).

Average number of Twitter followers by budget size, 2013 v. 2014

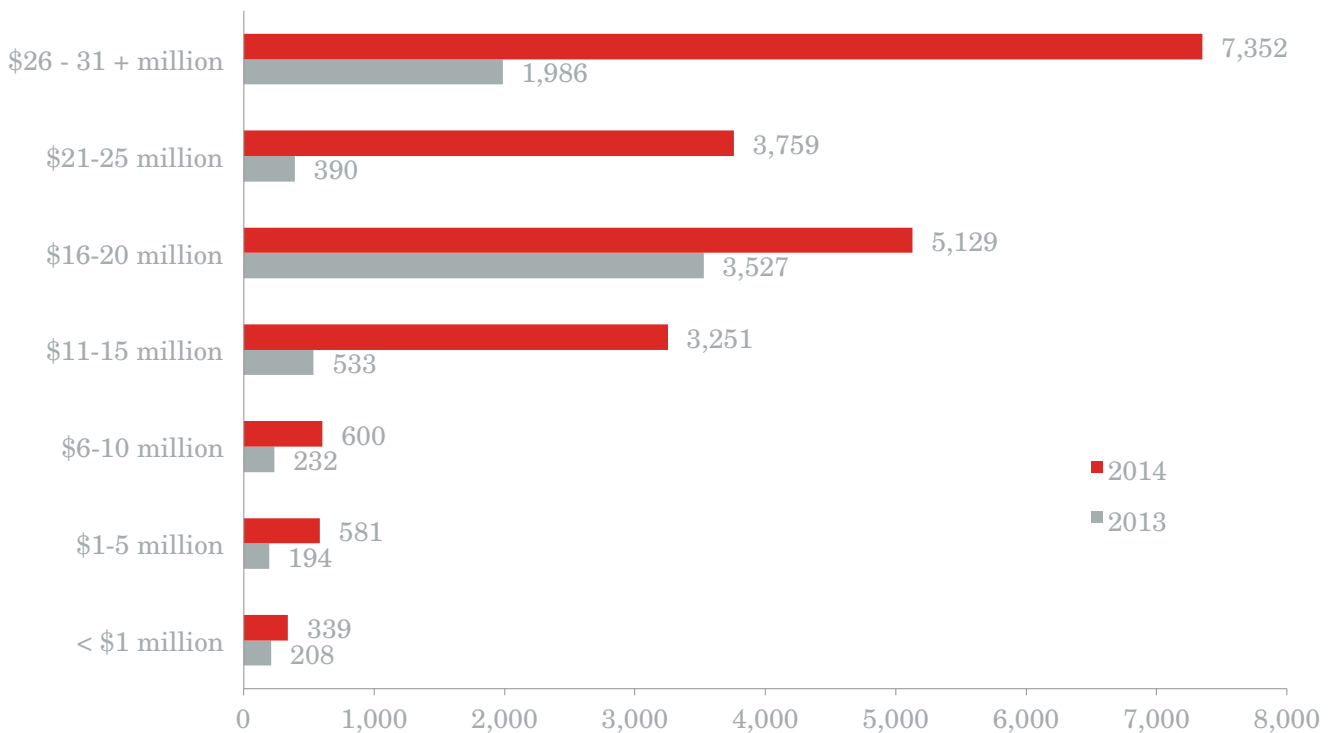


Social Media

Arts organizations of all budget sizes saw growth in Instagram followers from 2013 to 2014.

For most organizations, the number of Instagram followers more than doubled from 2013 to 2014.

Average number of Instagram followers by budget size, 2013 v. 2014



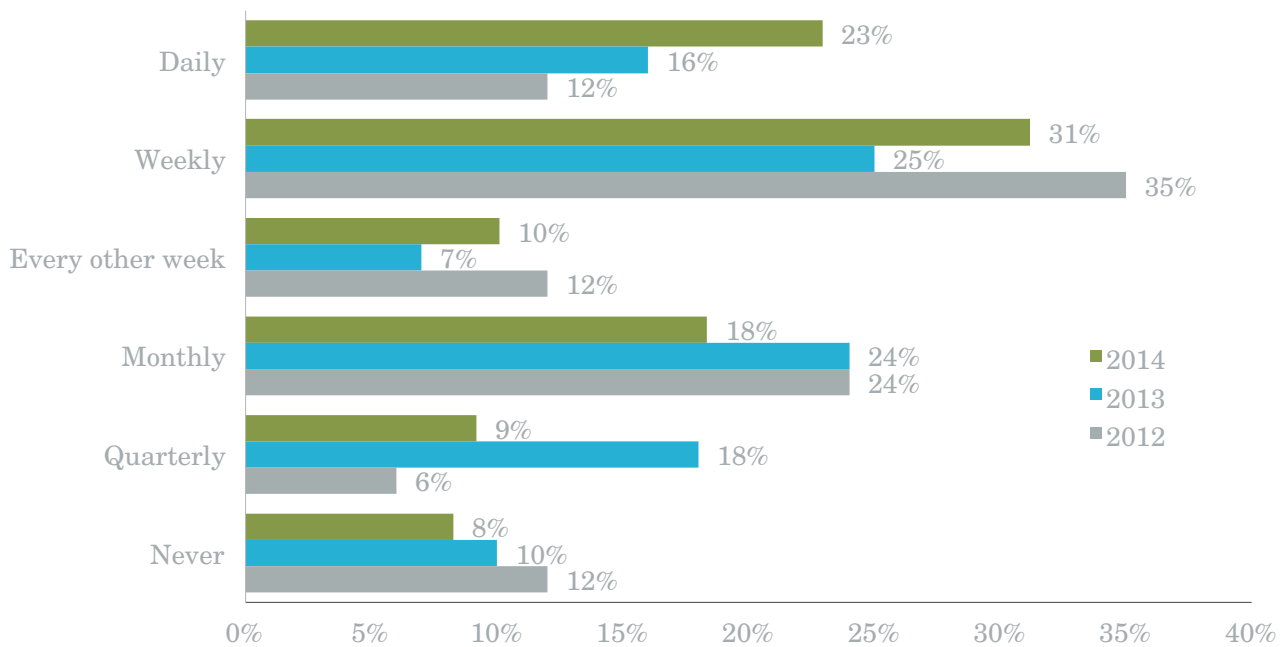
*2013 data heavily influenced by lack of tracking and reporting by participating arts organizations.

Social Media

54% of organizations checked their social media insights at least once a week.

There was a significant decrease in the number of organizations that checked their social media insights less frequently than once a month. But, 8% of arts organizations indicated that they never checked their social media insights.

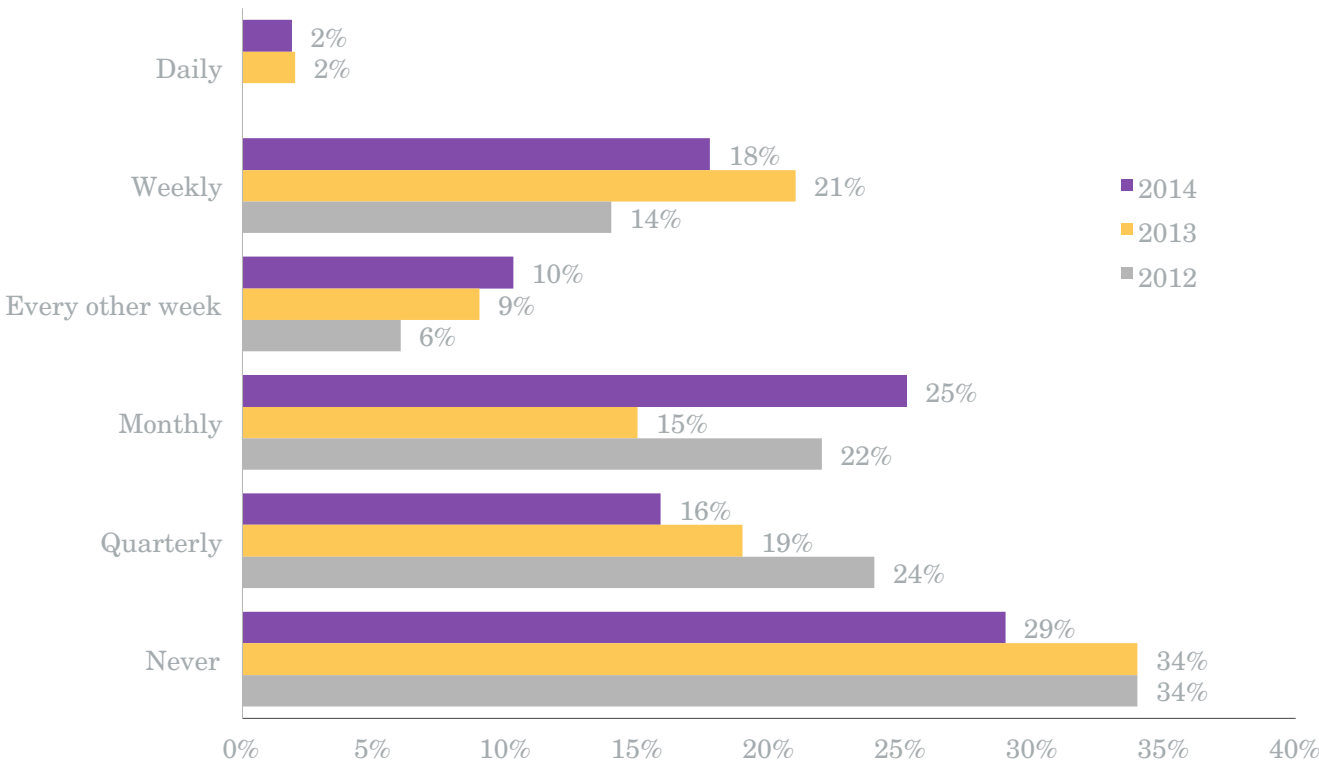
Frequency at which arts organizations reviewed social networks via reports, 2012 - 2014



Social Media

29% of arts organizations never met to discuss social media results, but 30% met more than twice a month to do so.

Frequency at which arts organizations reviewed social networks via meetings, 2012 - 2014

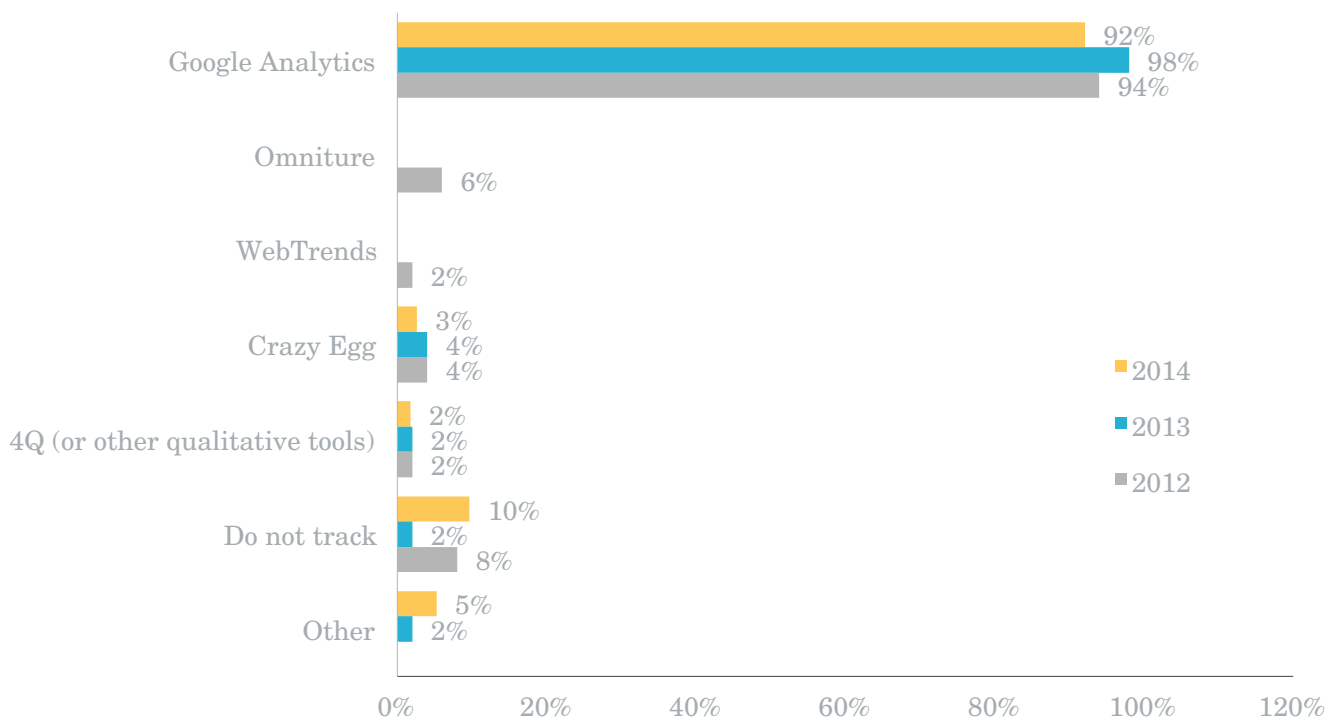


Analytics

Since 2012, Google Analytics has remained the preferred web analytics tool.

A small number of arts organizations used qualitative surveys, like 4Q, and click visualization tools like CrazyEgg, to work in conjunction with their click-stream analytics. 9% of organizations were not tracking web analytics at all.

Tools used by arts organizations to track their website's analytics, 2012 - 2014

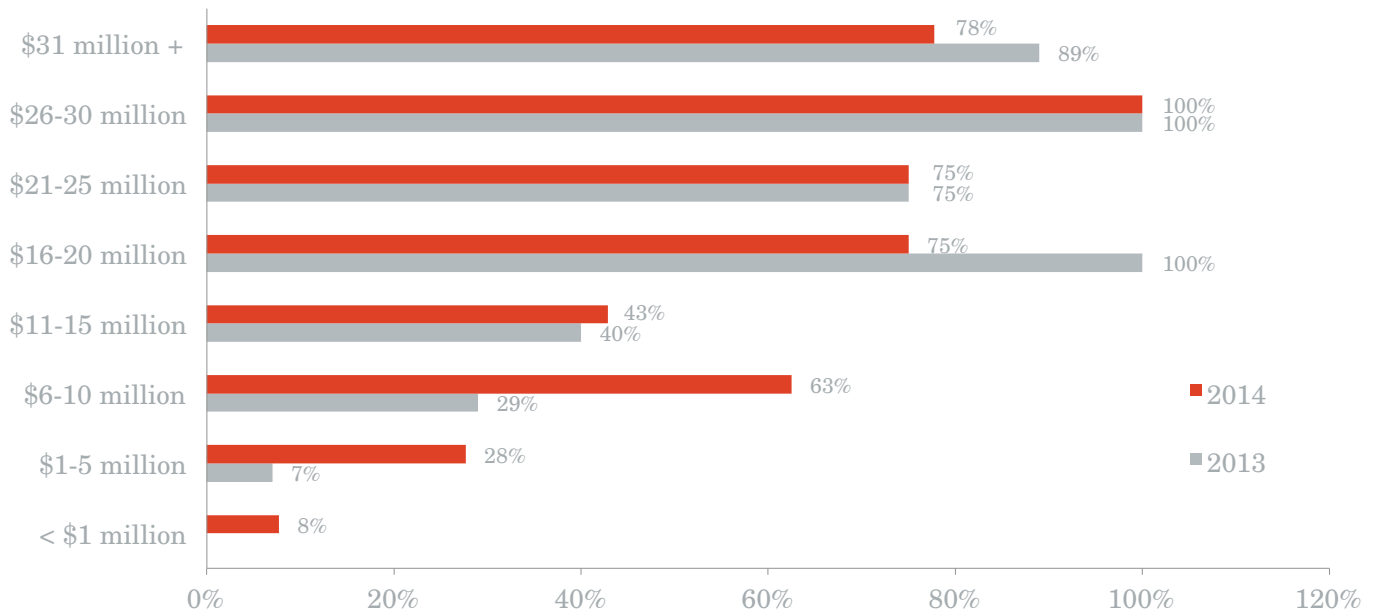


Analytics

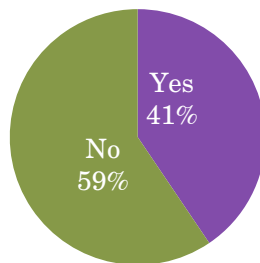
41% of arts organizations have e-commerce tracking set up on their analytics platform. Full implementation continued to correlate with magnitude of budget.

Organizations with annual budgets of \$10 million and below saw a significant increase in implementing e-commerce tracking on their sites. Many small organizations may not sell their tickets directly on their websites, which may skew this data.

Percentage of arts organizations by budget size that used e-commerce tracking, 2013 v. 2014



Percentage of arts organizations that have e-commerce implemented on their analytics platform in 2014

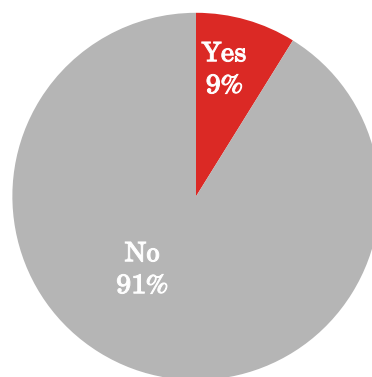


Analytics

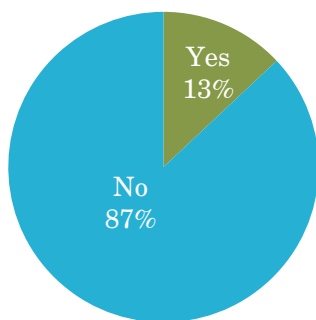
Most organizations reported that they were not using web analytics to its potential.

In 2014, fewer than 10% of organizations felt that they were using web analytics to its potential.

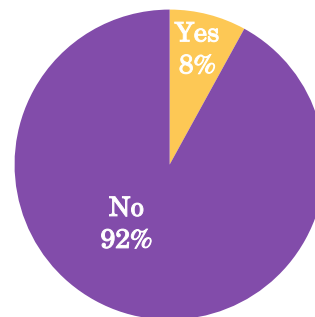
Percentage of organizations that believed they used web analytics to its potential in 2014



Percentage of organizations that believed they used web analytics to its potential in 2013



Percentage of organizations that believed they used web analytics to its potential in 2012

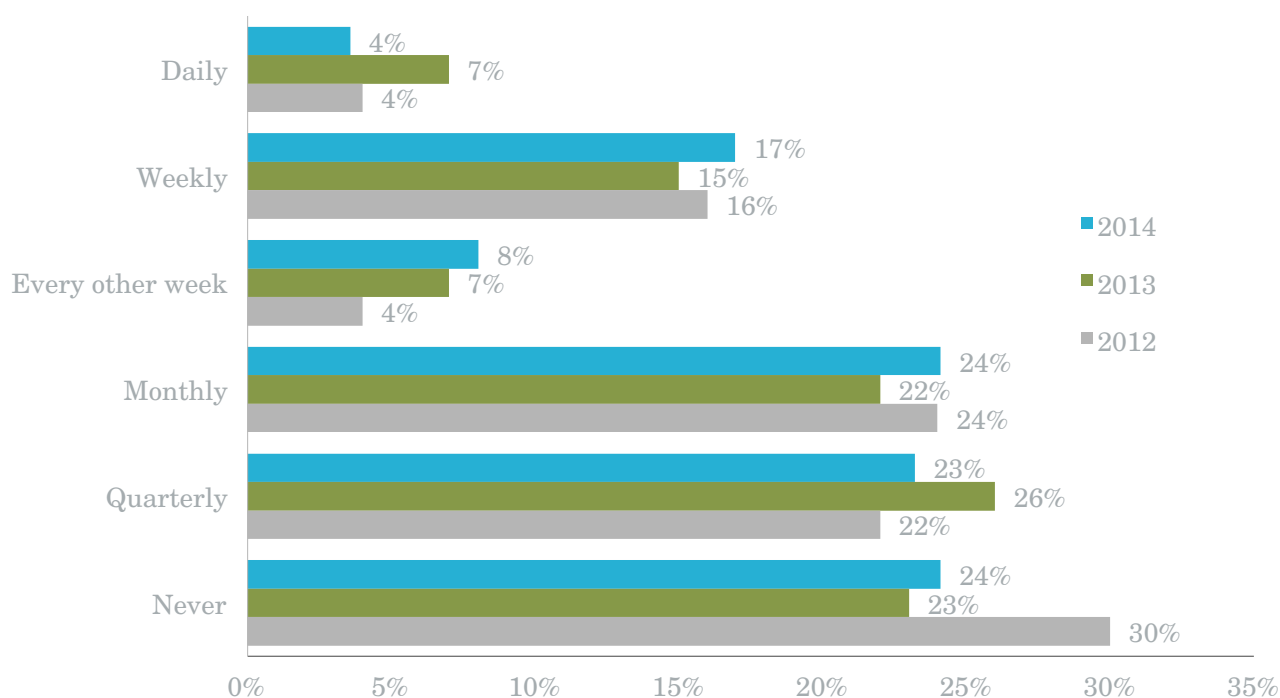


Analytics

53% of arts organizations reviewed web analytics reports at least once a month.

However, 24% of organizations reported that they never reviewed analytics reports in 2014. Only 21% reviewed reports more frequently than weekly.

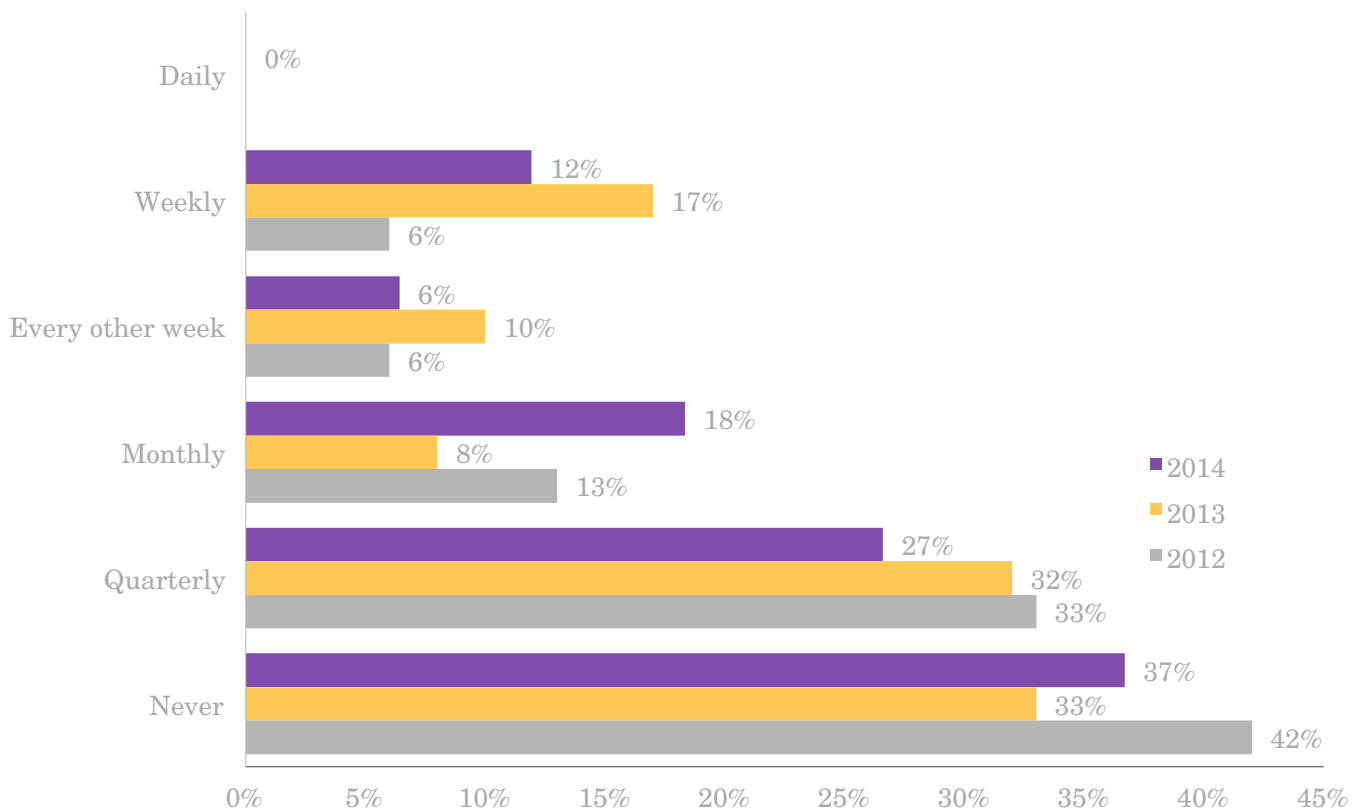
Frequency at which arts organizations reviewed their web analytics via reports, 2012 - 2014



Analytics

36% of arts organizations met at least once a month to discuss web analytics results, while 37% reported they never met for these discussions.

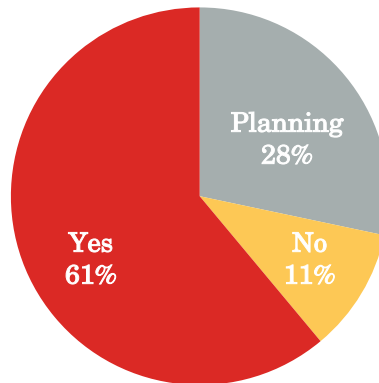
Frequency at which arts organizations reviewed their web analytics via meetings, 2012 - 2014



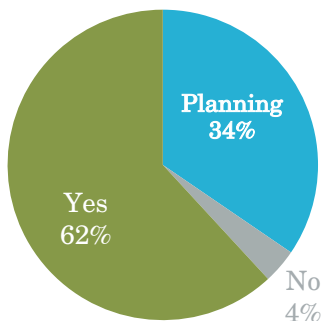
Mobile

Only 61% of arts organizations had mobile-enabled websites in 2014, but 28% indicated they were planning to build one.

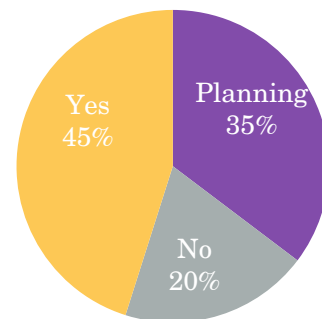
Percentage of organizations that had a mobile or mobile-enabled website in 2014



Percentage of organizations that had a mobile or mobile-enabled website in 2013



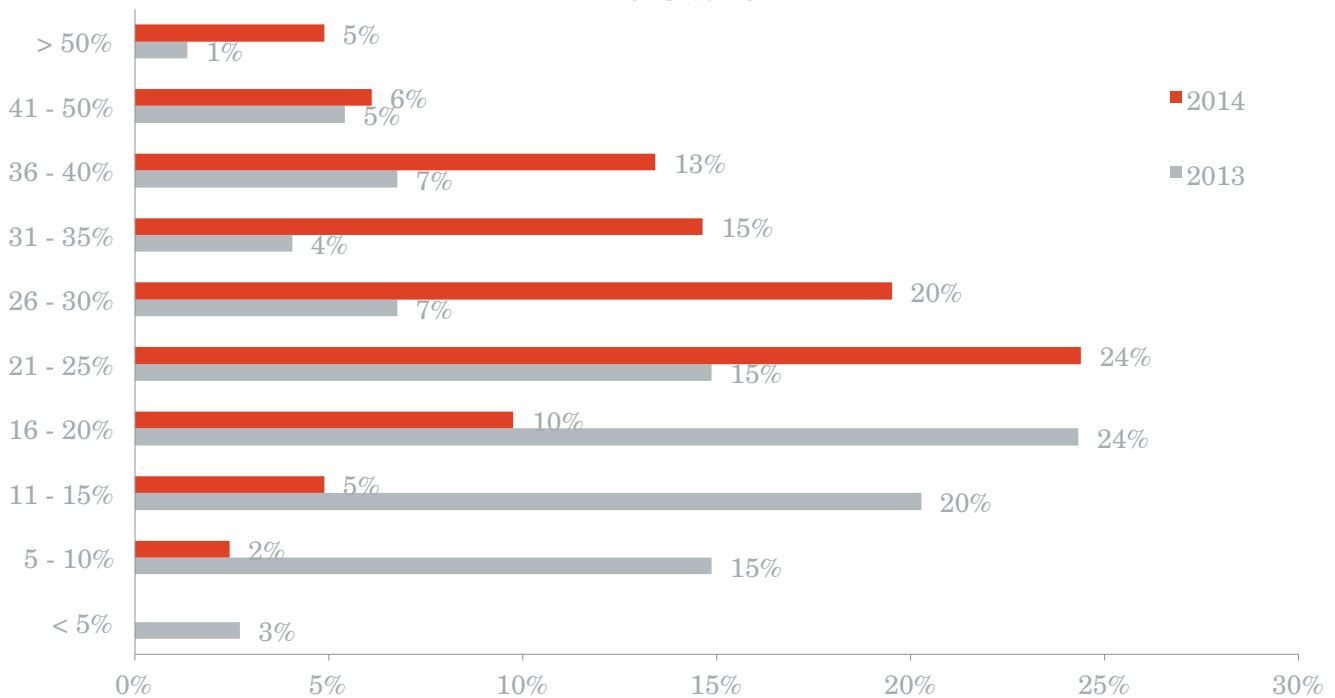
Percentage of organizations that had a mobile or mobile-enabled website in 2012



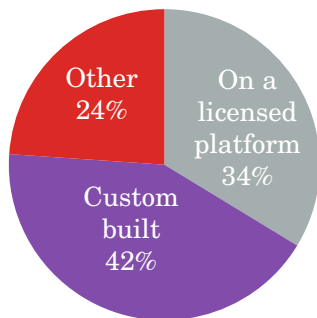
Mobile

83% of arts organizations saw at least a fifth of their web traffic from a mobile device, and 59% saw at least a quarter.

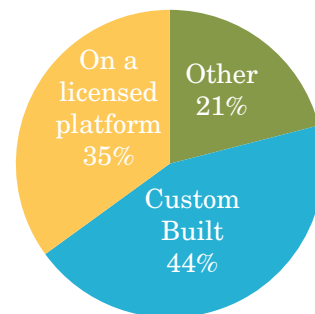
Percentage of arts organizations' web traffic from a mobile device, 2013 v. 2014



How arts organizations built their mobile site in 2014



How arts organizations built their mobile site in 2013

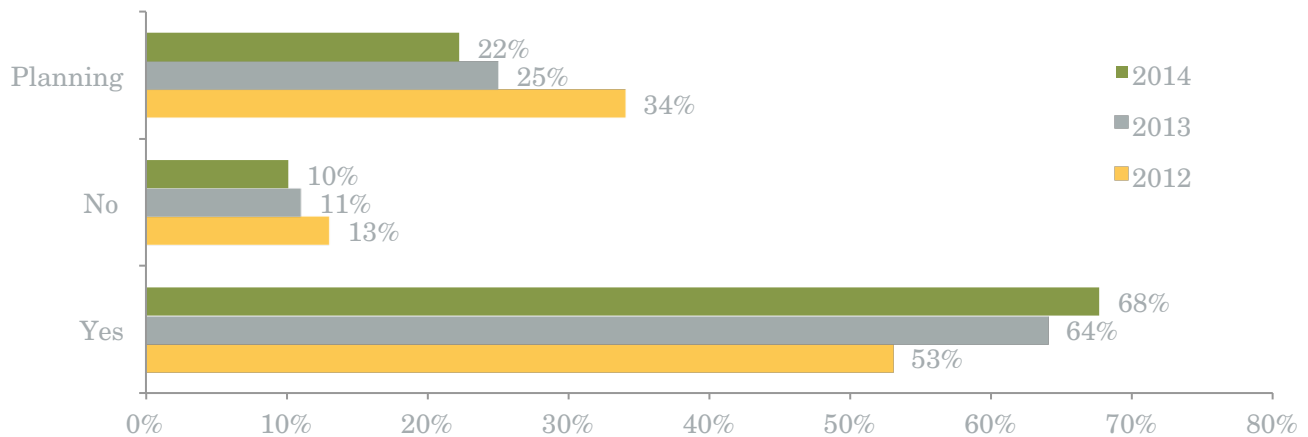


Mobile

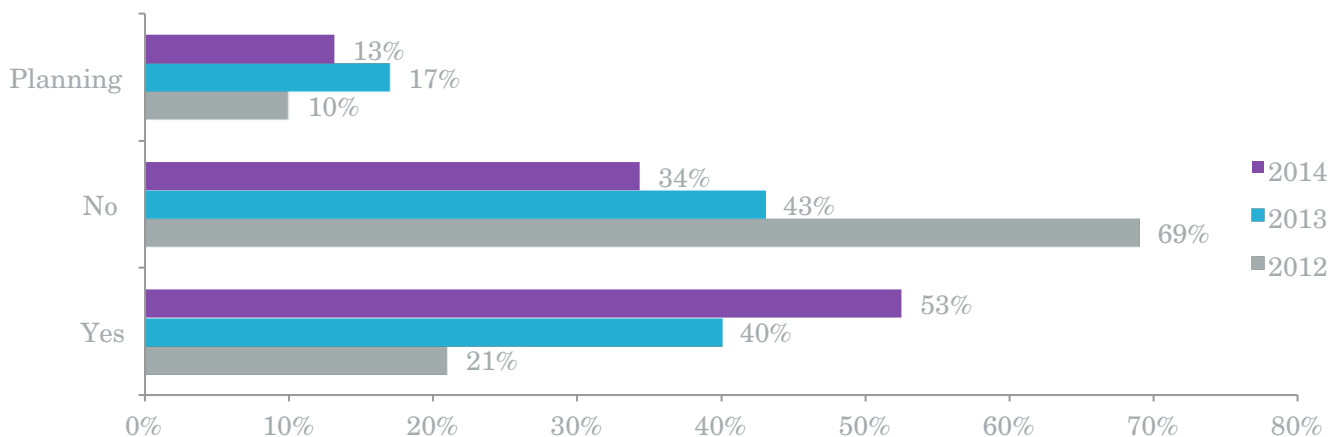
68% of arts organizations offered e-commerce on their mobile sites. 53% bought mobile advertising.

The number of organizations that bought mobile advertising increased to 53% from 40% in 2013.

Percentage of organizations that offered the ability to purchase tickets on a mobile site, 2012 - 2014



Percentage of organizations that bought mobile advertising, 2012 - 2014

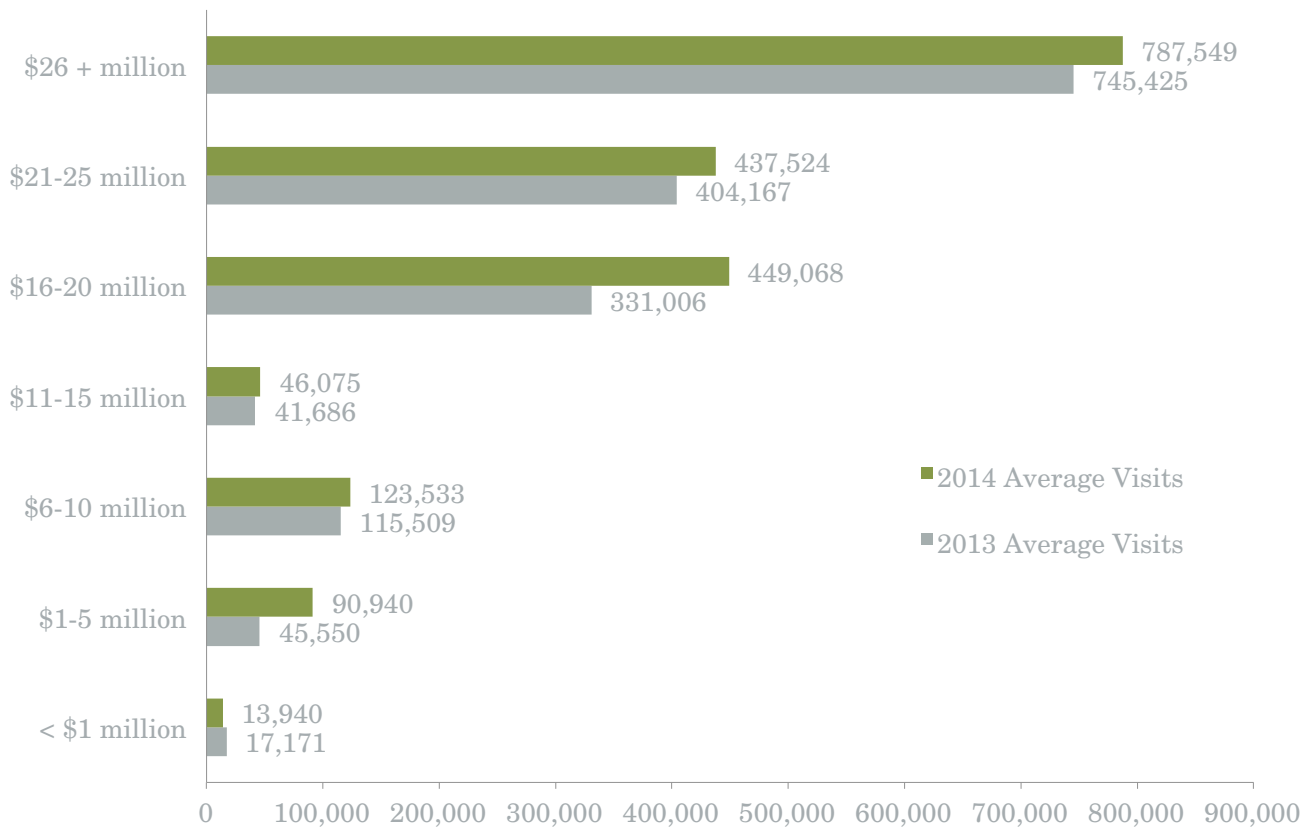


Website

Not surprisingly, organizational budget size correlated with monthly website traffic.

Monthly website traffic grew across the board from 2013 to 2014.

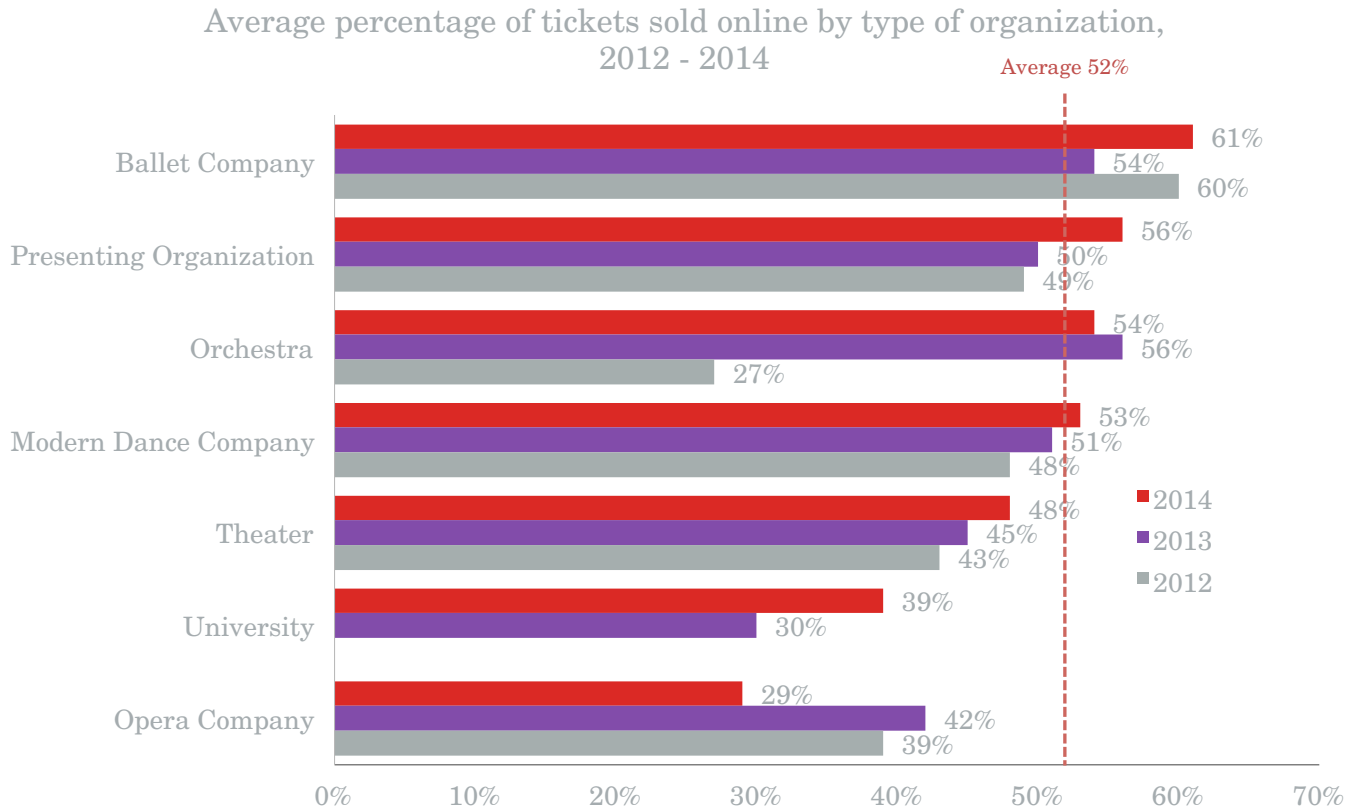
Average monthly website visits by budget size, 2013 v. 2014



Website

On average, arts organizations sold 52% of their tickets online in 2014.

Ballet companies saw the highest percentage of online tickets sold, followed by presenting organizations and orchestras.



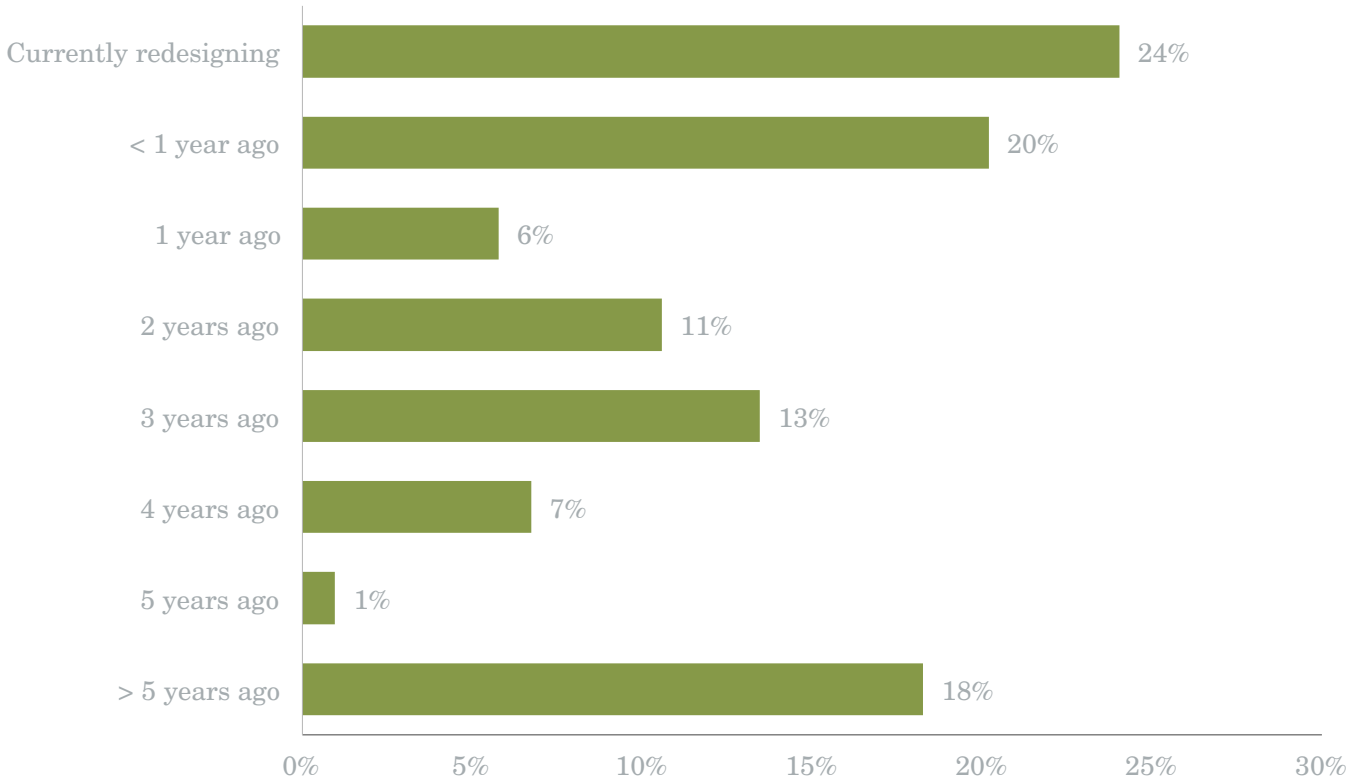
* 2014 opera company data skewed because only 3 opera companies responded to this question.

Website

26% of arts organizations redesigned their websites within the last year. 24% were currently redesigning their sites.

However, about 20% of organizations had not redesigned their websites in 5 years or more.

Last website redesign survey responses in 2014

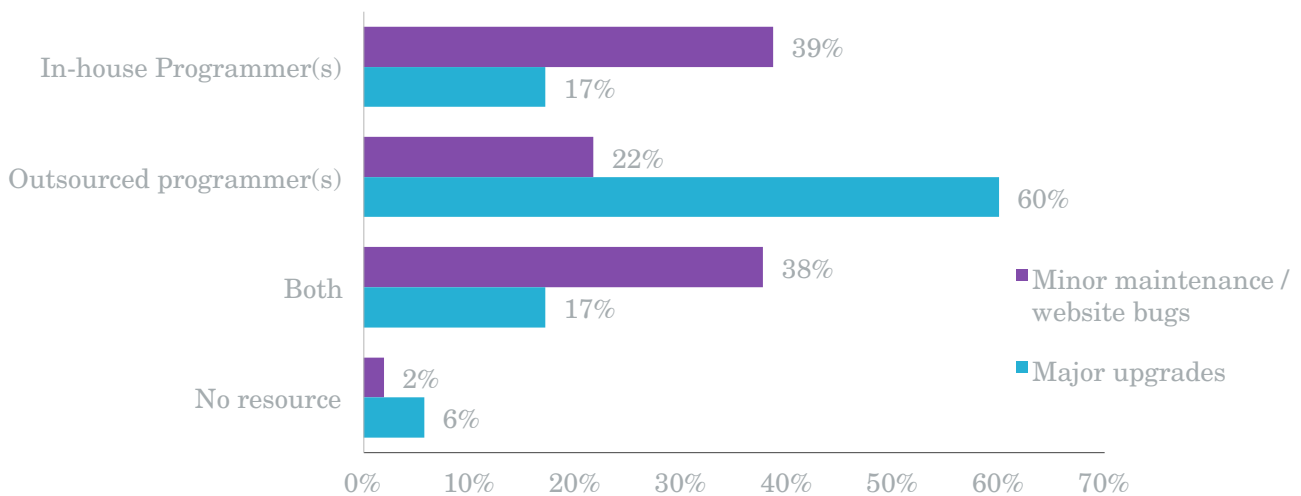


Site Maintenance

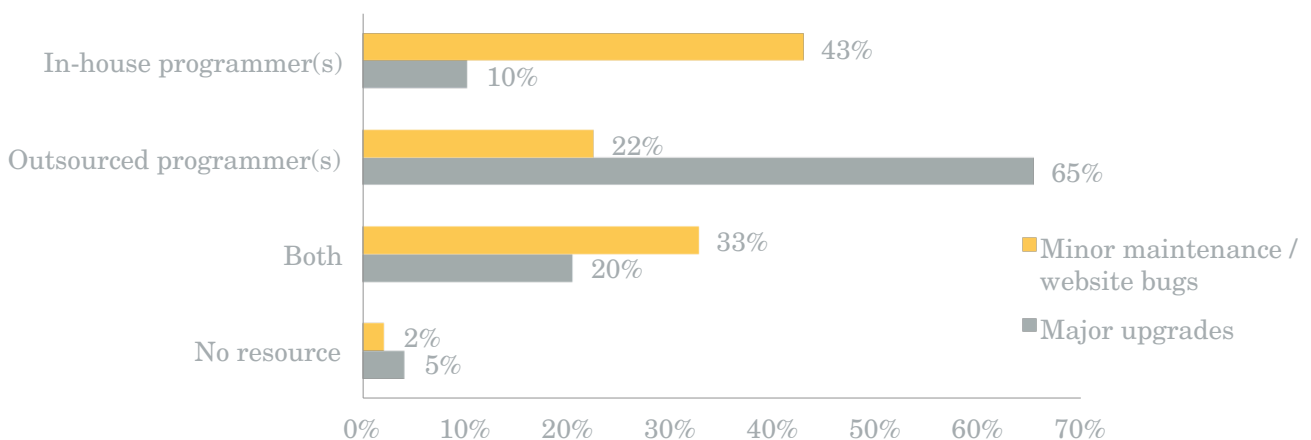
Arts organizations continued to use external programmers for major website upgrades.

In 2014, 60% of arts organizations outsourced major website upgrades to programmers. 39% used in-house programmers for minor maintenance and website bugs.

How arts organizations managed website projects in 2014



How arts organizations managed website projects in 2013

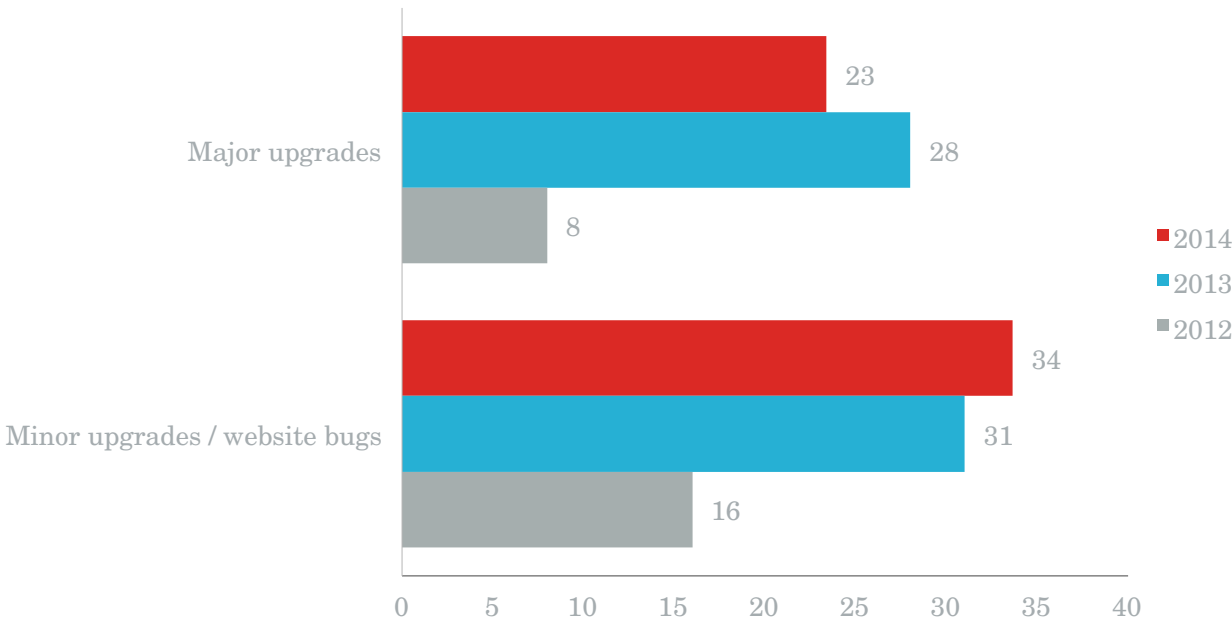


Site Maintenance

Arts organizations spent more time on major and minor site upgrades, compared to 2013 and 2012.

Since about 20% of participating organizations had websites that were at least 5 years old, minor upgrades likely entailed both upgrades for basic website functionality and website enhancements beyond basic abilities.

Average number of hours per month spent on website upgrades, 2012 - 2014

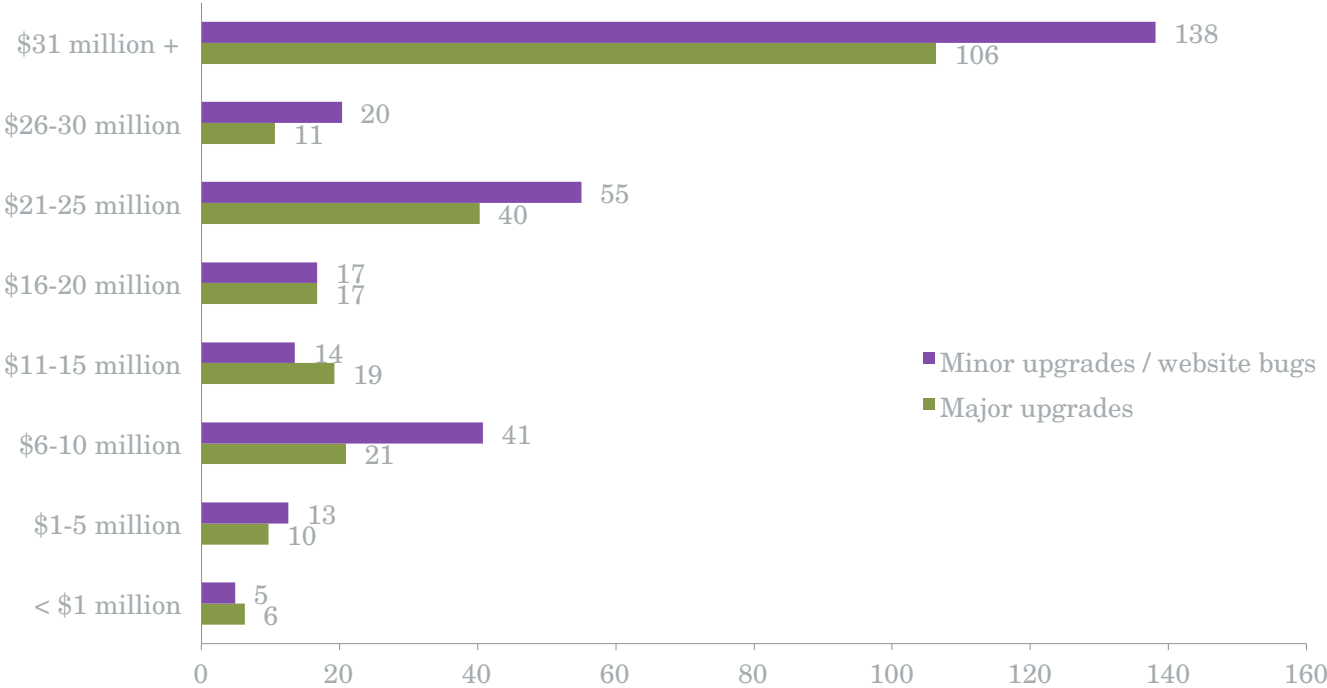


Site Maintenance

Larger organizations invested far more time on their websites than smaller organizations.

In 2014, the majority of that time was spent on minor upgrades.

Average number of hours per month spent on website upgrades by budget size in 2014

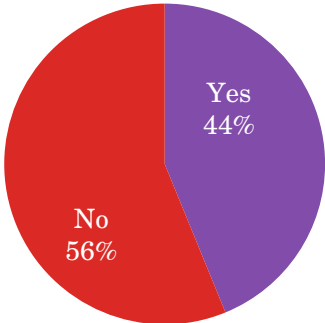


Site Maintenance

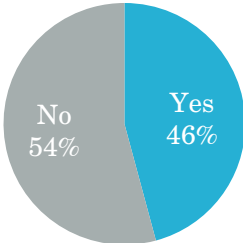
Only 44% of arts organizations felt they had the budget to cover website maintenance.

Unfortunately, this had not improved significantly since our first survey in 2012.

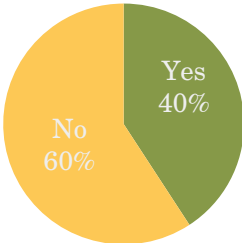
Percentage of arts organizations that felt they had an adequate budget to cover website maintenance in 2014



Percentage of arts organizations that felt they had an adequate budget to cover website maintenance in 2013



Percentage of arts organizations that felt they had an adequate budget to cover website maintenance in 2012

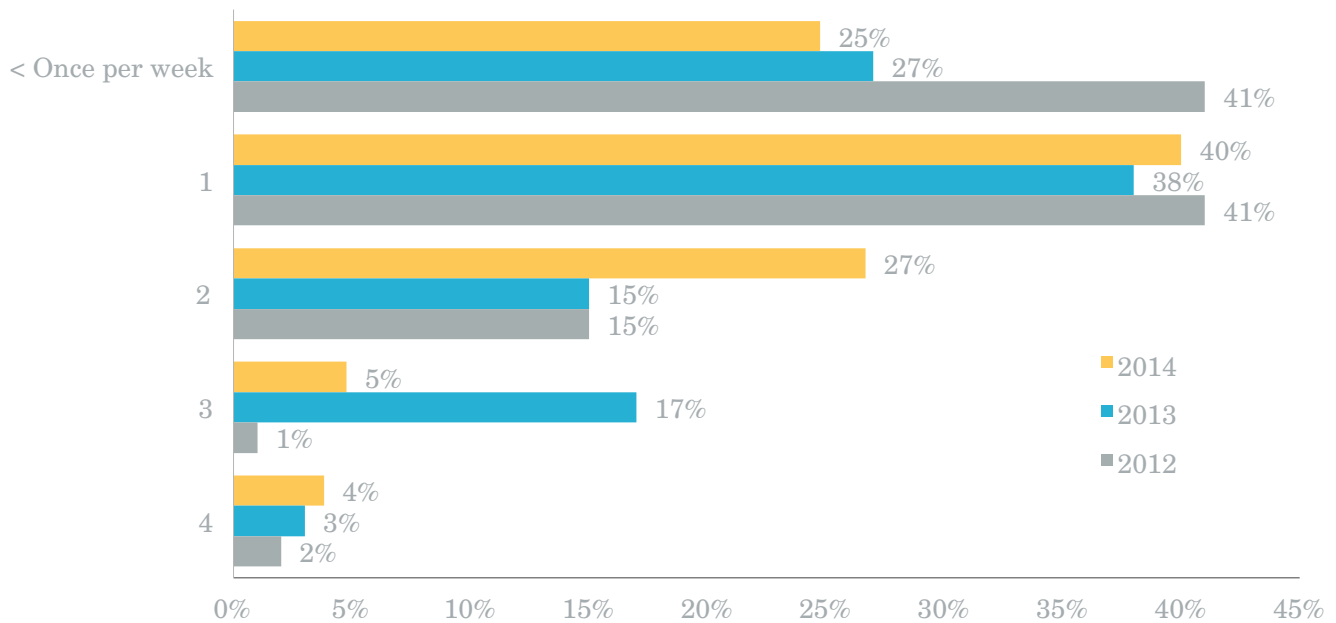


Email

65% of arts organizations sent one email, or fewer, per week to constituents.

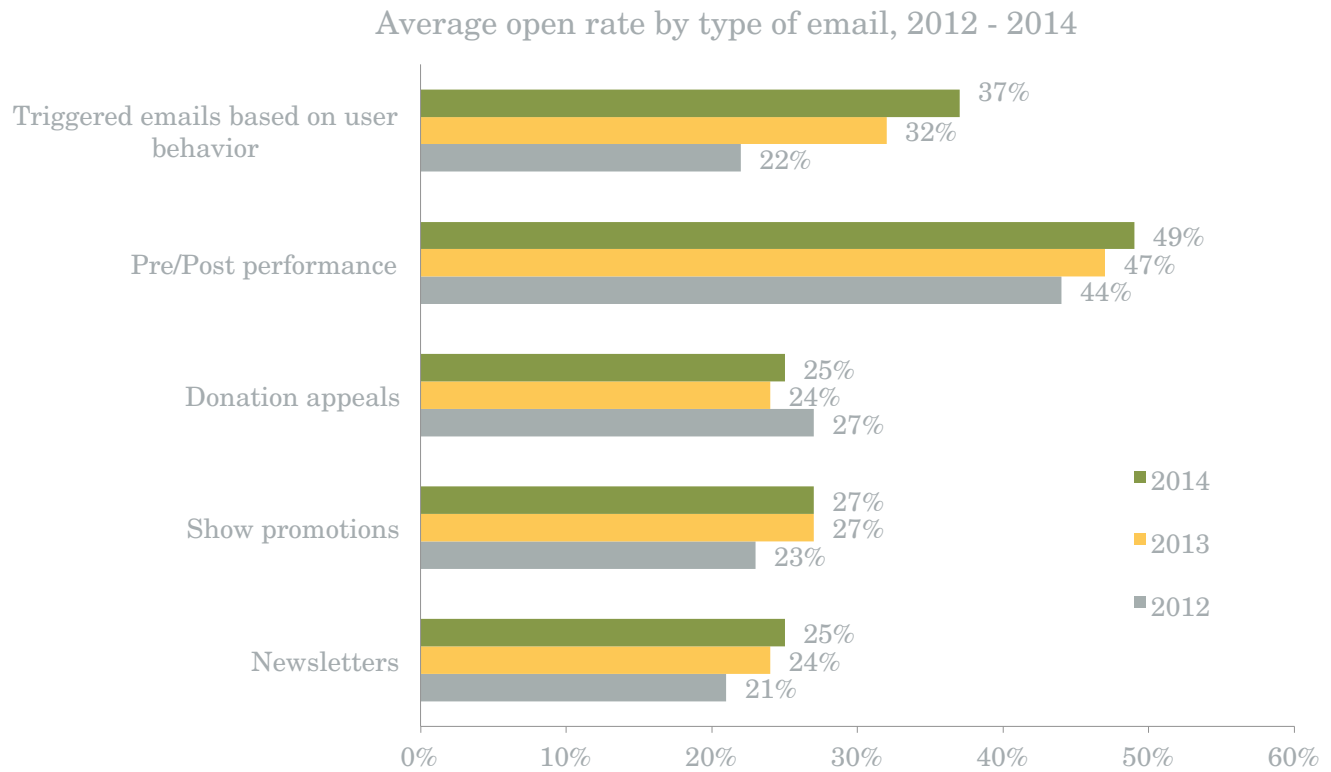
In 2014, 25% of arts organizations sent emails to their constituents less than once per week. 40% sent constituents just one email per week.

Number of emails sent each week, 2012 - 2014



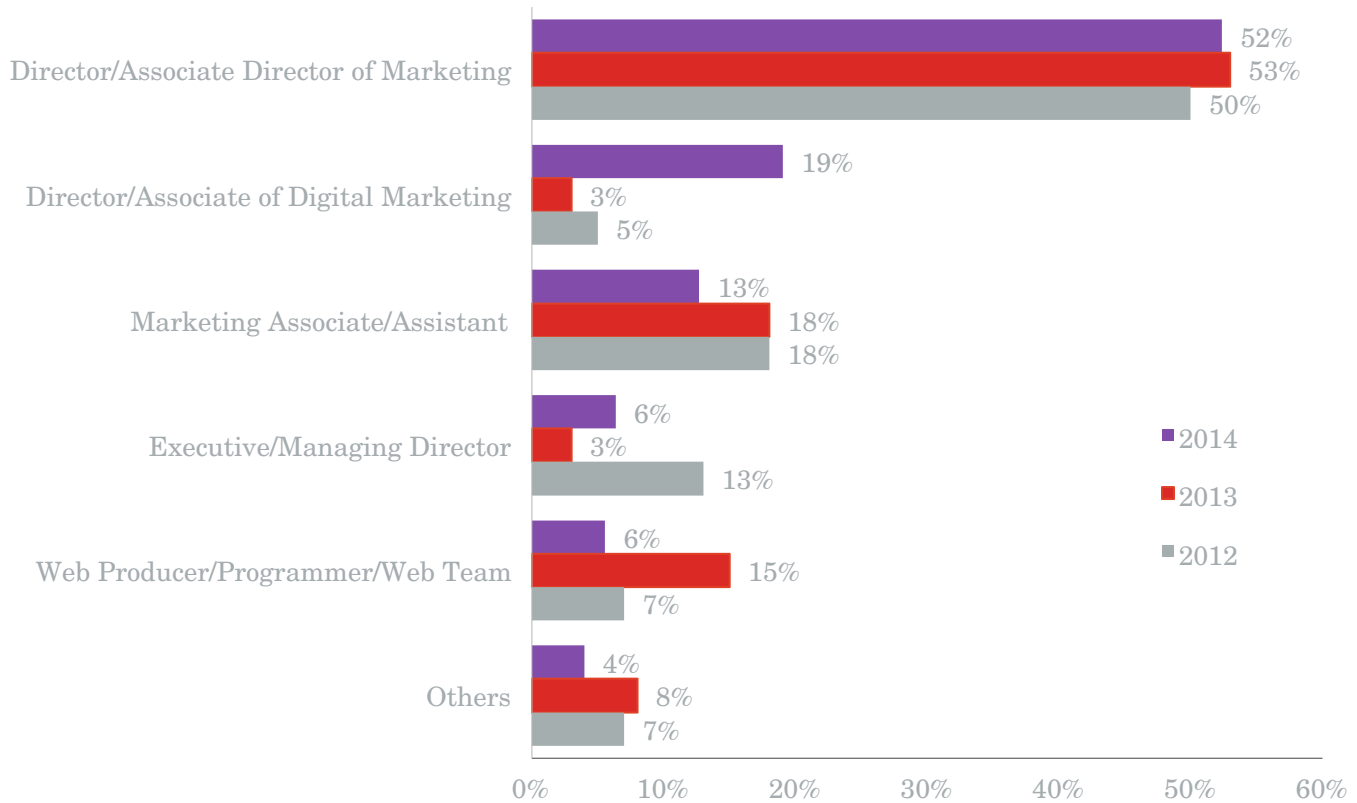
Email

Pre-show and post-show emails continued to be the most opened email type.



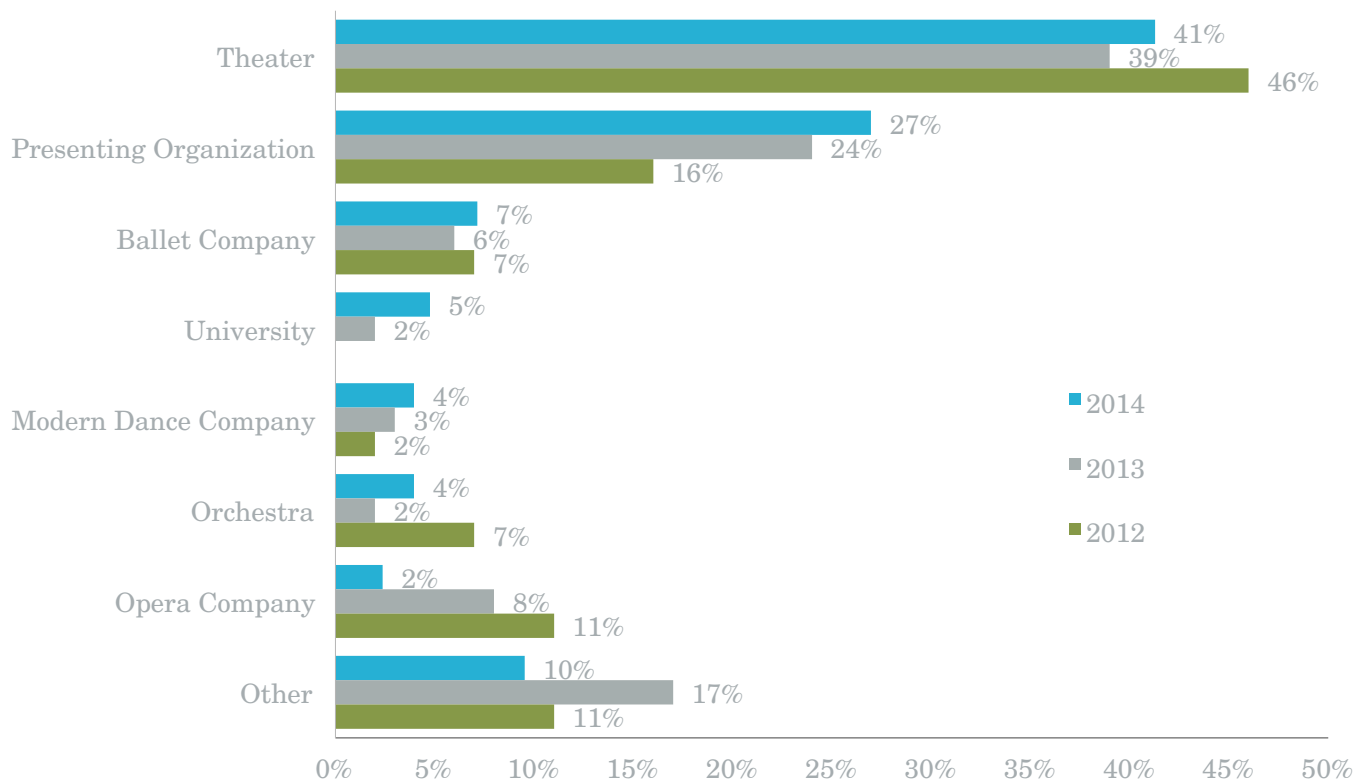
About the Organizations

Respondents' role, 2012 - 2014



About the Organizations

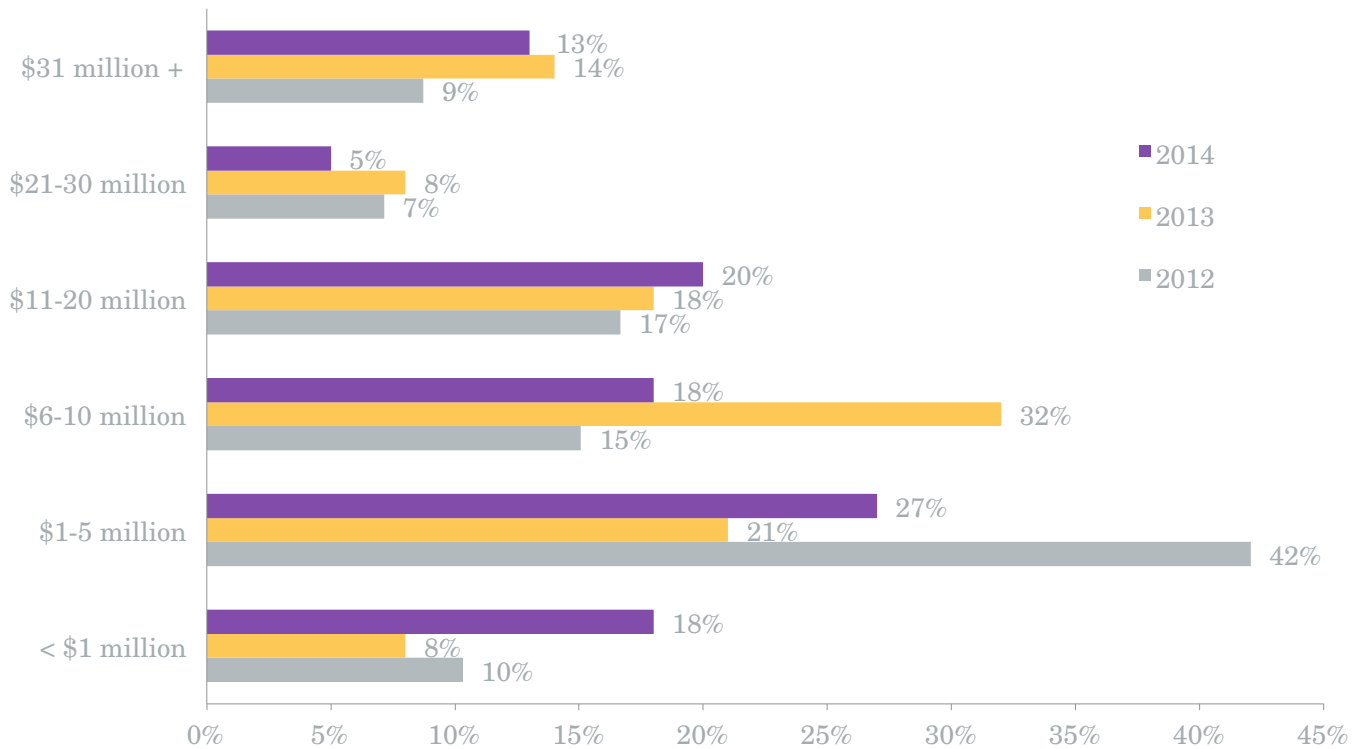
Organizations by type, 2012 - 2014



*The "Other" category includes artistic service organizations, teaching and performing entities, and choruses.

About the Organizations

Organizations' annual budgets, 2012 - 2014



About Capacity Interactive

Capacity Interactive is the premier digital marketing consulting firm serving the leading cultural organizations in the United States and abroad.

Our services include digital advertising, website redesign project management, web analytics, search engine optimization, social media strategy, and online fundraising.

We host an annual conference in New York City called *Digital Marketing Boot Camp for the Arts* and offer a website plug-in called Leadacity, to help organizations collect more email addresses and Facebook “Likes.”

Our mission is to help our clients engage audiences, build passionate communities, and market smarter.

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