2015 Arts Industry Digital Marketing Benchmark Study

Market research data from over 130 arts organizations
# Table of Contents

**Introduction and Key Findings** ......................................................................................................................................................... 3

**Paid Digital Media**  
Biggest obstacle ........................................................................................................................................................................ 5
Paid digital media budget ................................................................................................................................................................. 6
Types of digital media purchased ..................................................................................................................................................... 7
Tracking digital media ......................................................................................................................................................................... 8
Tracking digital media campaigns ....................................................................................................................................................... 9
Google Grant ...................................................................................................................................................................................... 10
3rd party agencies ............................................................................................................................................................................ 12
Content budget .................................................................................................................................................................................. 13

**Social Media**  
Posting and preferred social media platforms ........................................................................................................................................... 14
Tracking Facebook campaigns .............................................................................................................................................................. 15
Social Media platforms fans by budget size .............................................................................................................................................. 16
Insights and analytics ........................................................................................................................................................................ 19

**Video**  
Videos produced .................................................................................................................................................................................... 21
Video content by platform ....................................................................................................................................................................... 22

**Analytics**  
Tracking website analytics .................................................................................................................................................................. 24
E-commerce ....................................................................................................................................................................................... 25
Analytics opinion ................................................................................................................................................................................ 26
Analytics review .................................................................................................................................................................................. 27

**Mobile**  
Mobile-enabled websites .................................................................................................................................................................... 29
Percentage of mobile traffic ................................................................................................................................................................. 30

**Website**  
Website traffic .................................................................................................................................................................................... 31
Online ticket sales ............................................................................................................................................................................. 32
Website redesign .................................................................................................................................................................................. 33

**Site Maintenance**  
Website upgrades .................................................................................................................................................................................. 34
Minor vs. major upgrades ............................................................................................................................................................... 35
Time spent on website maintenance .................................................................................................................................................. 36
Adequate budget ................................................................................................................................................................................ 37

**Email**  
Emails per week .................................................................................................................................................................................. 38
Email open rate .................................................................................................................................................................................... 39

**About the participating organizations** ........................................................................................................................................ 40

**About Capacity Interactive** ......................................................................................................................................................... 43
Hello, and thank you for downloading our fourth Arts Industry Digital Marketing Benchmark Study. More than 130 organizations responded to the survey this year. While this sample size does not make the data statistically significant, it does provide a strong indication of where our industry stands regarding digital marketing practices. Here are three major trends to note:

**Organizations invested more in digital, but challenges around funding and expertise limited digital effectiveness.**

In 2015 more than half of organizations surveyed spent at least 21% of their paid media budget on digital. That was up from 44% of organizations in 2014 and 34% in 2013. Larger organizations invested more- 64% of organizations with budgets over $5 million spent 21% or more on digital advertising.

The same challenges remained from when we first administered this survey in 2012. 63% said that “not enough budget” was their main challenge and only 47% of organizations indicated they had enough budget to cover the maintenance for their website. About half of organizations said they still had trouble determining ROI and lacked the internal knowledge for digital strategy. 94% indicated they were not using web analytics to its potential.

**Social media, especially Facebook, was strongly embraced by arts marketers.**

100% of organizations had Facebook accounts and, for the first time, 100% of respondents indicated they purchased Facebook ads. Facebook fans grew 45% YOY across all budget sizes. 73% of respondents indicated they posted on Facebook at least once a day. Also, Facebook was the primary outlet for organizations to post and promote video, surpassing YouTube for both paid and organic posting.

Instagram usage saw dramatic growth- followers across respondents increased 174%. 96% of organizations had Instagram accounts, up from 81% in 2014, and 47% posted at least a few times per week.

Organizations began to pay more attention to social metrics. 41% of respondents indicated they checked their social media metrics at least once a week. That was an increase from 21% in 2014, but there is still a long way to go.

**Most arts organizations used video to market their offerings and began to invest in content.**

95% of organizations surveyed indicated they produced videos. One-third produced more than 20 annually while another third produced fewer than five videos (with the remaining somewhere in between).

98% of organizations posted their video to Facebook and 86% posted to YouTube. 94% of organizations paid to promote video on Facebook and 44% paid to do so on YouTube.

Most arts organization spent less than 5% of their marketing budget creating content, which was certainly a start. 15% spent 20% or more.

As I wrote last year, while we see some progress in the 2015 data, our leaders must recognize the importance of digital communication, 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 helps inform and bolster the field’s digital strategy and investment.

Erik Gensler
President
Capacity Interactive
Key Findings

Paid Digital Media
- 52% of organizations spent at least 20% of their total paid media budgets on digital marketing, up from 44% of organizations in 2014 and 34% in 2013.
- 100% of arts organizations invested in paid Facebook advertising. 71% purchased display 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, Twitter, and Instagram were the preferred social media platforms, followed by YouTube.
- 72% 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 20% posted on the platform at least once a day.

Video
- Facebook, not YouTube, was the preferred media platform for organizations to post their organic and promoted video content.
- One-third of organizations surveyed created more than 20 videos per year while one-third produced fewer than 5.

Analytics
- Across four years of data, Google Analytics remained the most popular web analytics tool, but 94% indicated they believed they were not using web analytics to its full potential.
- 56% of organizations had e-commerce tracking set up on analytics platforms.
- 52% of organizations reviewed web analytics reports at least once a month, but 29% never met to discuss web analytics results.

Mobile
- 90% of organizations saw at least a quarter of their site traffic from mobile.
- 67% of arts organizations had mobile enabled sites in 2015 and 24% planned to build one.
- 62% of organizations ran mobile ads and 28% of arts organizations had a mobile app in 2015.

Website
- On average, arts organizations sold 51% of their tickets online.
- 28% redesigned their websites within the past year, 80% within the past 3 years, and 26% redesigned their website in 2015.
- 53% 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. 66% still sent one email per week, or fewer, to their constituents.
- 91% of arts organizations reported that email collection was extremely important to their organizations.
- While both general and targeted email open rates increased, targeted pre-show and post-show emails had the highest open rate of 58%.
For the fourth consecutive year, respondents indicated that the biggest obstacle for digital marketing was lack of budget.

In 2015, 63% of arts marketers reported “not enough budget” as their biggest obstacle for digital marketing initiatives, consistent with 2012-2014 survey results.

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

Lack of internal knowledge and having no clear digital strategy were still issues for approximately 40% of organizations.
In 2015, 52% of arts organizations spent at least 21% of their paid media budgets on digital advertising, compared to 44% of organizations in 2014 and 34% in 2013.

When we look at organizations with budgets over $5 million, that number increases to 64% that spent at least 21% on digital.

100% of respondents indicated that they purchased Facebook advertising.

Also of note, there was no growth in the use of Twitter ads (only 12% purchased) or video ads (35% purchased). 63% of organizations bought direct placements on websites.

*This means organizations are investing at least some portion of their advertising budget on Facebook ads. This could be as simple as a few hundred dollars boosting posts, to a larger and more strategic Facebook advertising investment.
In display advertising, almost all organizations tracked clicks, 77% tracked click conversions, and 65% tracked view-through conversions.
84% 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 to track their placements.
70% of arts organizations surveyed took advantage of free AdWords advertising through the Google Grants program, up from 65% in 2014.

Google Grants provides not-for-profit organizations with $10,000 per month in free AdWords on Google.com. Still, 30% of arts organizations did not take advantage of the free advertising offering.
Arts organizations spent through more of their monthly Google Grant budget.

In 2015, 43% of organizations spent over 50% of the $10,000 grant money provided, up from 33% of those surveyed 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, along with other qualifications. More information: [https://support.google.com/grants/answer/6022748?hl=en](https://support.google.com/grants/answer/6022748?hl=en).
More arts organizations used 3rd parties or agencies to assist with digital campaigns.

Larger organizations, in particular, engaged 3rd parties. 100% of organizations with budgets over $21 million did so.
Most arts organizations spent less than 5% of their marketing budget creating content.

However, 15% spent 20% or more.
Facebook, Twitter, and Instagram were the preferred social media platforms amongst organizations surveyed.

In 2015, all of the participating arts organizations posted on Facebook, and 73% posted at least once a day.

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

More arts organizations had an Instagram account (96%) than in 2014 (81%), and 47% of organizations posted on Instagram a few times a week. Only 12% posted at least once a day.

Frequency at which arts organizations posted content on social networks in 2015

- Facebook: 14% More than 2x a day, 23% Twice a day, 36% Once a day, 25% A few times a week, 3% A few times a month
- Twitter: 31% More than 2x a day, 14% Twice a day, 18% Once a day, 25% A few times a week, 8% A few times a month
- Youtube: 8% More than 2x a day, 76% Twice a day
- Instagram: 5% More than 2x a day, 12% Twice a day, 47% Once a day, 28% A few times a week
- Blog: 2% More than 2x a day, 12% Twice a day, 30% Once a day, 55% A few times a week
- Pinterest: 16% More than 2x a day
- Flickr: 18% More than 2x a day
- Google+: 3% More than 2x a day, 8% Twice a day
- Vimeo: 17% More than 2x a day
- Tumblr: 5% More than 2x a day, 9% Twice a day
- Foursquare: 0% More than 2x a day
- Vine: 0% More than 2x a day
- Snapchat: 4% More than 2x a day
78% of arts organizations tracked click conversions on their Facebook campaigns.

66% tracked view-through conversions.
Organizations of all sizes saw growth in Facebook “Likes” from 2014 to 2015.

Overall, organizations saw a 45% increase in Facebook “Likes”.

*For this question organizations were asked to indicate number of Facebook “Likes” in 2014 and 2015 so we are comparing “apples to apples” and not data across multiple surveys from different years.*
Most organizations surveyed saw growth in Twitter followers from 2014 to 2015.

Overall, organizations saw a 32% increase in Twitter followers.

*For this question organizations were asked to indicate number of Twitter followers in 2014 and 2015 so we are comparing “apples to apples” and not data across multiple surveys from different years.*
Arts organizations surveyed saw dramatic growth in Instagram followers from 2014 to 2015.

Overall, organizations saw a 174% increase in Instagram followers.

*For this question organizations were asked to indicate number of Instagram followers in 2014 and 2015 so we are comparing “apples to apples” and not data across multiple surveys from different years.*

<table>
<thead>
<tr>
<th>Budget Size</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$1 million</td>
<td>483</td>
<td>998</td>
</tr>
<tr>
<td>$1-5 million</td>
<td>1,212</td>
<td>2,113</td>
</tr>
<tr>
<td>$6-10 million</td>
<td>1,467</td>
<td>1,661</td>
</tr>
<tr>
<td>$11-15 million</td>
<td>1,356</td>
<td>2,226</td>
</tr>
<tr>
<td>$26-30 million</td>
<td>3,041</td>
<td>11,874</td>
</tr>
<tr>
<td>$31 million +</td>
<td>9,571</td>
<td>28,100</td>
</tr>
</tbody>
</table>

*Average number of Instagram followers by budget size*
Arts organizations focused their efforts on social media networks more than ever.

41% of organizations checked their social media insights at least once a week. However, 10% of arts organizations indicated that they never checked their social media insights, which is down from 24% in 2014.
27% of arts organizations never met to discuss social media results, but 30% met more than twice a month to do so.
95% of organizations surveyed produced video to market their productions.

One-third of respondents indicated they produced more than 20 videos per year. One-third produced 1-5.

Percentage of arts organizations that produced videos in 2015

- More than 20 videos: 28%
- 15-20 videos: 11%
- 10-15 videos: 7%
- 5-10 videos: 17%
- 1-5 videos: 33%
- 0 videos: 5%
98% of arts organizations posted their organic videos on Facebook.

86% of arts organizations posted organic videos on YouTube and almost 50% posted on Instagram and Twitter.
94% of arts organizations paid to promote their videos on Facebook, but only 44% paid to promote videos on YouTube.

Percentage of arts organizations that promoted videos, by platform in 2015:

- Facebook: 94%
- YouTube: 44%
- Instagram: 16%
- Twitter: 12%
- Other: 8%
- Vine: 0%
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.
56% of arts organizations had e-commerce tracking set up in their analytics platform. Full implementation continued to correlate with size of budget.

Percentage of arts organizations that had e-commerce implemented in their analytics platform in 2015

Percentage of arts organizations by budget size that used e-commerce tracking in 2015

- $31 million +: 90%
- $26-30 million: 60%
- $21-25 million: 100%
- $16-20 million: 44%
- $11-15 million: 65%
- $6-10 million: 67%
- $1-5 million: 44%
- < $1 million: 31%
Most organizations reported that they did not use web analytics to its potential.

In 2015, only 6% of organizations felt that they used web analytics to its potential, consistent with previous years’ findings.
Half of arts organizations reviewed web analytics reports at least once a month.

However, 29% of organizations reported that they never reviewed analytics reports in 2015. 19% reviewed reports daily or weekly.
One-third of arts organizations met at least once a month to discuss web analytics results, while almost half reported they never met for these discussions.

Frequency at which arts organizations reviewed their web analytics via meetings:

- **Daily**: Never, 0%
- **Weekly**: 6%, 12%, 15%
- **Every other week**: 6%, 10%
- **Monthly**: 6%, 8%, 13%, 17%
- **Quarterly**: 8%, 13%, 22%, 27%, 32%, 33%, 44%
- **Never**: 6%, 8%, 10%, 12%, 15%, 17%, 22%, 27%, 32%, 33%, 37%, 42%
Only 67% of arts organizations had mobile-enabled websites in 2015 (up from 61% in 2014), but 24% indicated they planned to build one.

29% of organizations had a mobile app or apps.

Organizations who had mobile apps in 2015

<table>
<thead>
<tr>
<th>Planning</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>28%</td>
<td>69%</td>
</tr>
</tbody>
</table>
90% of arts organizations saw at least a fifth of their web traffic from a mobile device, up from 72% in 2014. 79% saw at least a quarter, up from 44% in 2014.

How organizations built their mobile site in 2015

- Custom Built: 53%
- On licensed Platform: 35%
- Other: 12%
Not surprisingly, organizational budget size correlated with monthly website traffic.

Average number of site visits per month based on budget size

On average, arts organizations sold 51% of their tickets online in 2015.

Ballet companies saw the highest percentage of online ticket sales, followed by presenting organizations and orchestras.
28% of arts organizations redesigned their websites within the last year. 26% were redesigning their sites in 2015.

However, about 15% of organizations had not redesigned their websites in five years or more.
Most arts organizations used external programmers for major website upgrades.

In 2015, 63% of arts organizations outsourced major website upgrades to programmers. 55% used in-house programmers for minor maintenance and website bugs.
Arts organizations spent less time on major and minor site upgrades.

This may be due to newer Content Management Systems, which are easier to edit without technical assistance.

Average number of hours per month spent on website upgrades

- **2015**: Major upgrades: 22, Minor upgrades / website bugs: 25
- **2014**: Major upgrades: 23, Minor upgrades / website bugs: 34
- **2013**: Major upgrades: 28, Minor upgrades / website bugs: 31
- **2012**: Major upgrades: 8, Minor upgrades / website bugs: 16
Larger organizations invested far more time on their websites than smaller organizations.

Average number of hours per month spent on website upgrades by budget size in 2015

- $31 million +: 75 hours
- $26-30 million: 68 hours
- $21-25 million: 39 hours
- $16-20 million: 37 hours
- $11-15 million: 30 hours
- $6-10 million: 12 hours
- $1-5 million: 15 hours
- < $1 million: 10 hours

Legend:
- Purple: Major upgrades
- Olive: Minor upgrades / website bugs
Only 47% of arts organizations felt they had the budget to cover website maintenance.

Unfortunately, this had not improved much since our first survey in 2012 (40%).

Percentage of arts organizations that felt they had an adequate budget to cover website maintenance in 2015

- Yes: 47%
- No: 53%

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

- Yes: 44%
- No: 56%
66% of arts organizations sent one email, or fewer, per week to constituents.

In 2015, 25% of arts organizations sent emails to their constituents less than once per week. 41% sent constituents just one email per week.

Number of emails sent each week

- < 1 email per week: 25% in 2015, 25% in 2014, 27% in 2013, 41% in 2012
- 1 email per week: 24% in 2015, 38% in 2014, 40% in 2013, 41% in 2012
- 2 emails per week: 15% in 2015, 15% in 2014, 17% in 2013, 5% in 2012
- 3+ emails per week: 1% in 2015, 3% in 2014, 4% in 2013, 5% in 2012
Not surprisingly, emails triggered by user behavior, including pre- and post-show emails, performed best. These triggered emails continued year-over-year performance growth while “blast” emails stagnated.
About the Organizations

Respondent organizations by type

- **Theater**
  - 2015: 34%
  - 2014: 41%
  - 2013: 39%
  - 2012: 46%

- **Presenting Organization**
  - 2015: 22%
  - 2014: 27%
  - 2013: 24%
  - 2012: 16%

- **Ballet Company**
  - 2015: 5%
  - 2014: 7%
  - 2013: 6%
  - 2012: 7%

- **University**
  - 2015: 6%
  - 2014: 5%
  - 2013: 2%
  - 2012: 2%

- **Modern Dance Company**
  - 2015: 2%
  - 2014: 4%
  - 2013: 3%
  - 2012: 2%

- **Orchestra**
  - 2015: 5%
  - 2014: 4%
  - 2013: 2%
  - 2012: 7%

- **Opera Company**
  - 2015: 2%
  - 2014: 2%
  - 2013: 8%
  - 2012: 11%

- **Museum**
  - 2015: 12%
  - 2014: 10%
  - 2013: 11%
  - 2012: 17%

- **Other**
  - 2015: 12%
  - 2014: 10%
  - 2013: 11%
  - 2012: 17%
About the Organizations

Respondent organizations' annual budgets

- $6-10 million: 15% (2015), 18% (2014), 15% (2013), 18% (2012)
- $1-5 Million: 32% (2015), 27% (2014), 21% (2013), 18% (2012)
- < $1 million: 10% (2015), 18% (2014), 18% (2013), 10% (2012)

Arts Industry Digital Marketing
Benchmark Study

June 2016
C A P A C I T Y I N T E R A C T I V E

Page 42 of 43
About Capacity Interactive

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

Our consulting services include data-driven digital advertising, website redesign strategy, web analytics, search engine optimization, social media strategy, and online fundraising.

We host an annual conference in New York City in October 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.