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3. **Identify yourself.** Using your **phone** keypad, enter the unique 5-digit participant number from the bottom of your Voice Connection box. Enter the star (*) key before and after the number.

Tip: Find your Voice Connection Box near the lower right hand corner of your screen.

How Strong Is Your Social Net?

Survey Findings Preview

If you have just arrived via the Web, complete your phone connection. Dial 1 866 275 3495 and enter *4671867* on your phone. Then key in your 5-digit ID number (located in the Voice Connection box).

Your Hosts



Eric Giles

Learning Services Manager



Sue Struve

Communications Manager

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- **View all participants** in the roster to the right
- **Use the “Chat” box at any time** to submit a question or get technical help
- **During the Q&A break** presenters will answer chat questions

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I. Survey Findings Preview



Rory MacPherson

Principal, Trudel|MacPherson



Mary Trudel

Principal, Trudel|MacPherson



Jai Sen

Digital Media Strategist, Sen Associates

II. Your Questions and Comments

I. Survey Findings Preview



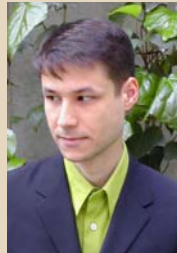
Rory MacPherson

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Jai Sen

Digital Media Strategist, Sen Associates

II. Your Questions and Comments

About this project

- Why are we doing this?
 - No comprehensive studies exist about adoption and use of digital media in arts organizations
 - All media are now digital—even “traditional” communications are created digitally
 - Digital media are changing the experience of the arts and the definition of the “audience”

About this project (continued)

- What is the scope of our research?
 - National: all 50 states
 - More than 1,500 respondents to date
 - Arts organizations of all types and sizes
 - The project was initiated in December of 2010
 - National baseline gathered by invitation (47 arts conveners total), open nationally since July

About this project (continued)

- What do we hope to accomplish?
 - Provide a broad snapshot of the state of digital communications in the arts
 - Provide deep insights into attitudes and trends
 - Track this data annually, examine changes from year to year

About this project (continued)

- The project so far
 - National survey will close September 30th
 - Releasing the full national report in the fall
 - Presentations scheduled
 - SouthArts: September
 - Grantmakers in the Arts (GIA): October
 - National Arts Marketing Project (NAMPP): November

Caveats

- This is data thus far—the survey will remain open through September 30th
- We expect even more insights when we run additional analysis on the complete data set

The good news

- The panic is over!
- Adoption of digital media is on the rise, but more importantly, so is experimentation
- Budgets are not a constraint: many people are being creative with it—it really is an equalizer
- Neither is geography: much interesting activity is away from the coasts and largest metro areas

The good news (continued)

- Most respondents are reporting interesting results, and there are some major successes
- Groups are starting to understand that they must let go of some degree of control
- Email is still king—respondents are almost universally using it, it's tried, true, and safe

Still a ways to go in some areas

- Competitive pressure remains a factor (but thankfully not a driver)
- The landscape of social media is fragmented, but some best practices are emerging
- There are missed opportunities for audience targeting and engagement—most are still “blanketing”

Still a ways to go in some areas (continued)

- There is still a tendency to treat digital media as one-way communication
 - Most arts groups are resource challenged
 - There is good measurement of basic (consumption) metrics, but uneven measurement of interaction
 - Over half of national respondents have not changed anything based on audience feedback

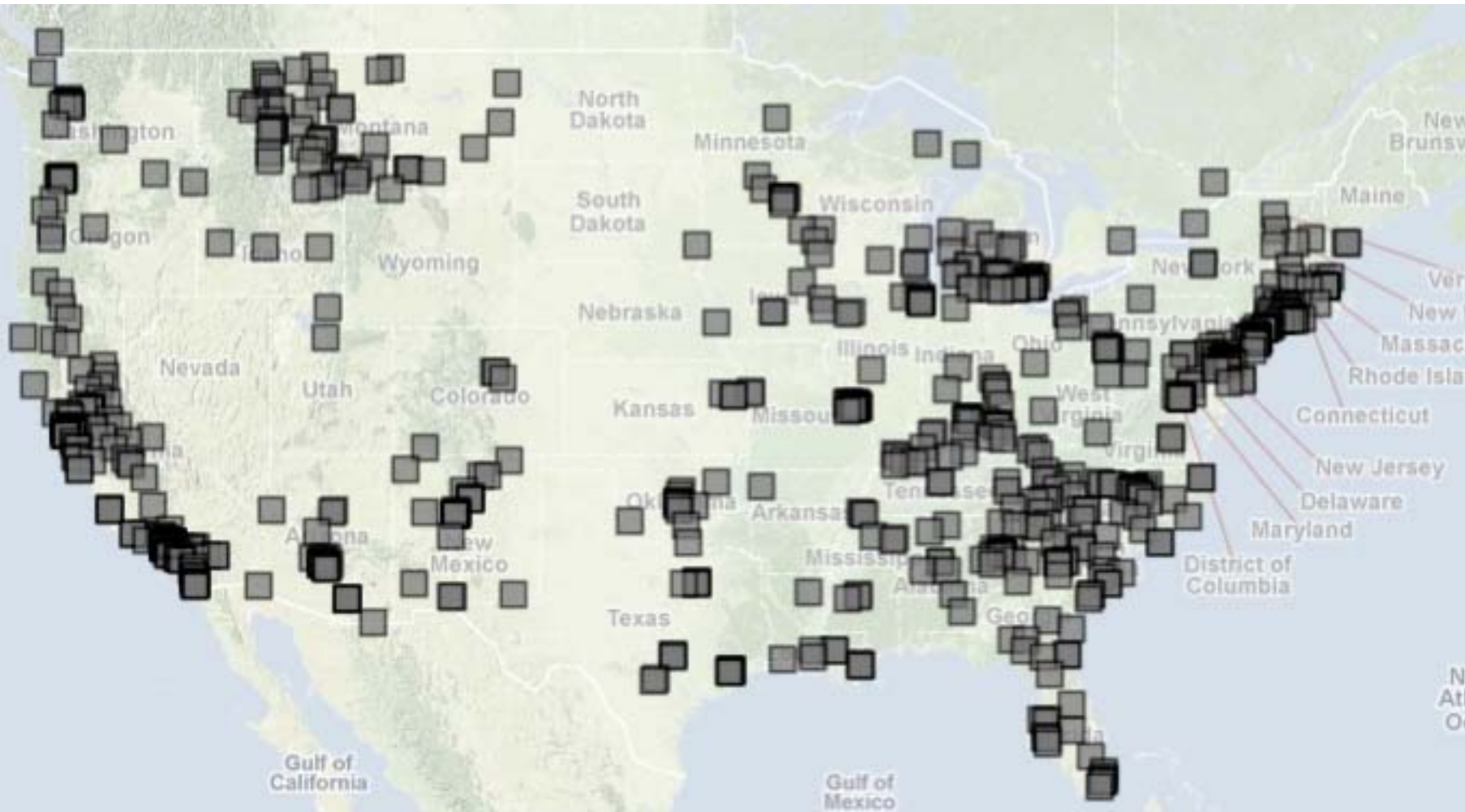
Still a ways to go in some areas (continued)

- Digital communications are still not integrated an overall communications strategy
 - Still treated by many as an “outlier” compared to more familiar “traditional” channels
 - Quality control for digital media is uneven
 - No consistent zone of responsibility (assign to interns, or everyone pitches in—two extremes of the same problem)

About the respondents

- More than 1,500 respondents nationwide
- From 840 towns, cities, or parts of major metro areas
- Almost 50% are organizations with operating budgets under \$500k
- Most respondents are directly responsible for digital and social media in their organizations

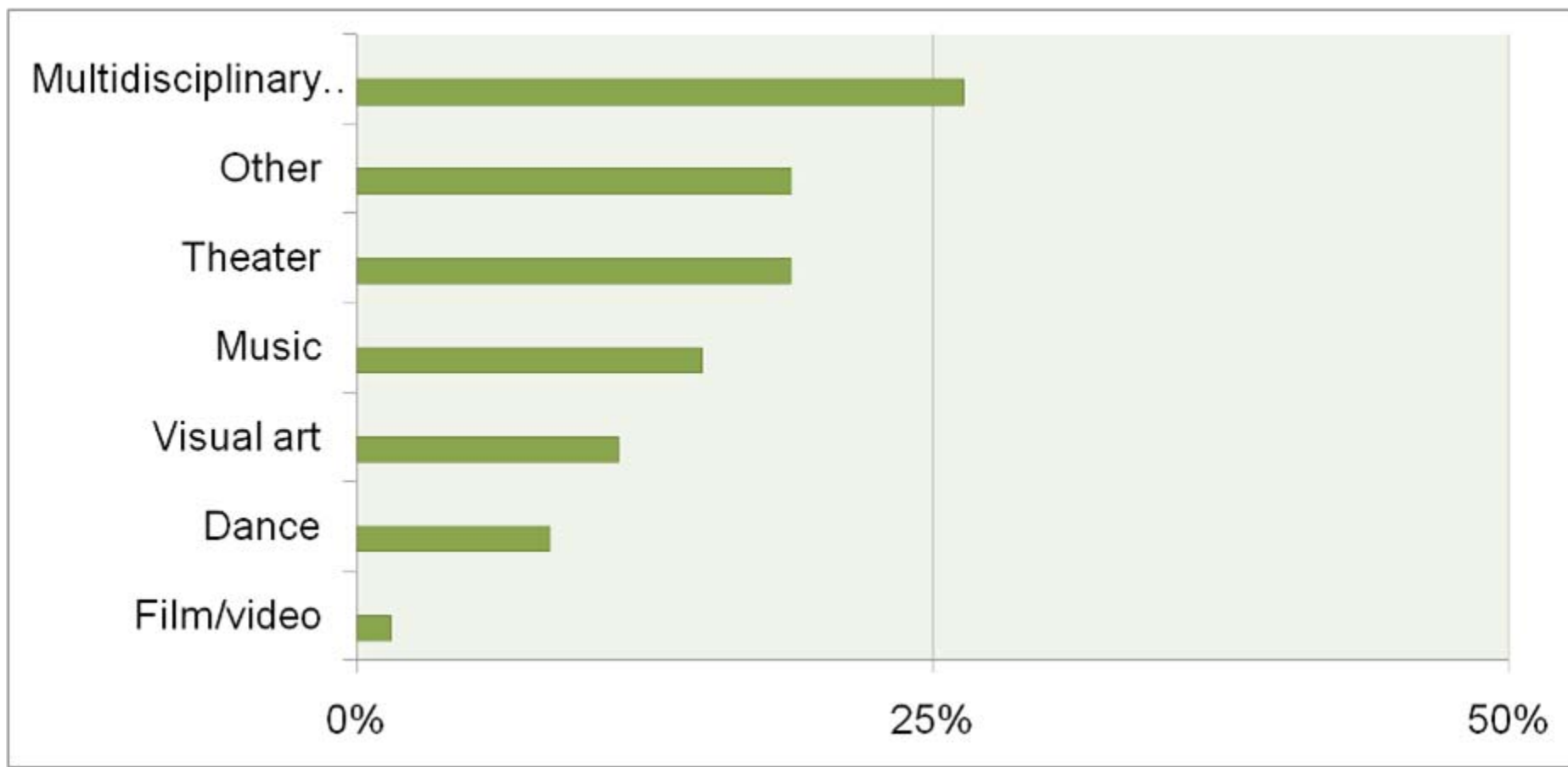
Where respondents are located



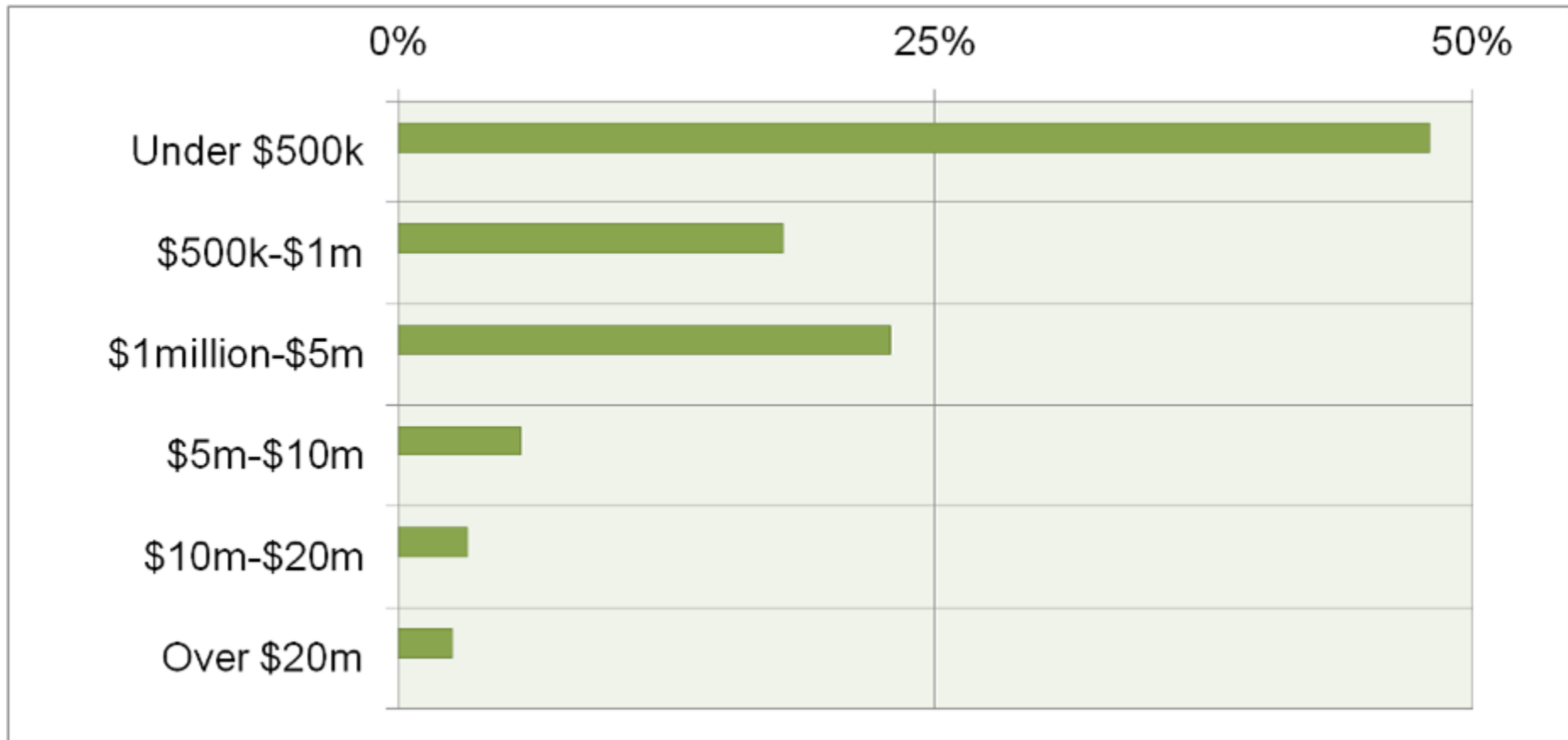
About the respondents (continued)

- Comprised of arts providers in every discipline we listed in our survey:
 - Multidisciplinary arts presenters
 - Visual art
 - Film/video
 - Music
 - Dance
 - Theater
- ...plus “others,” including historical museums and design centers

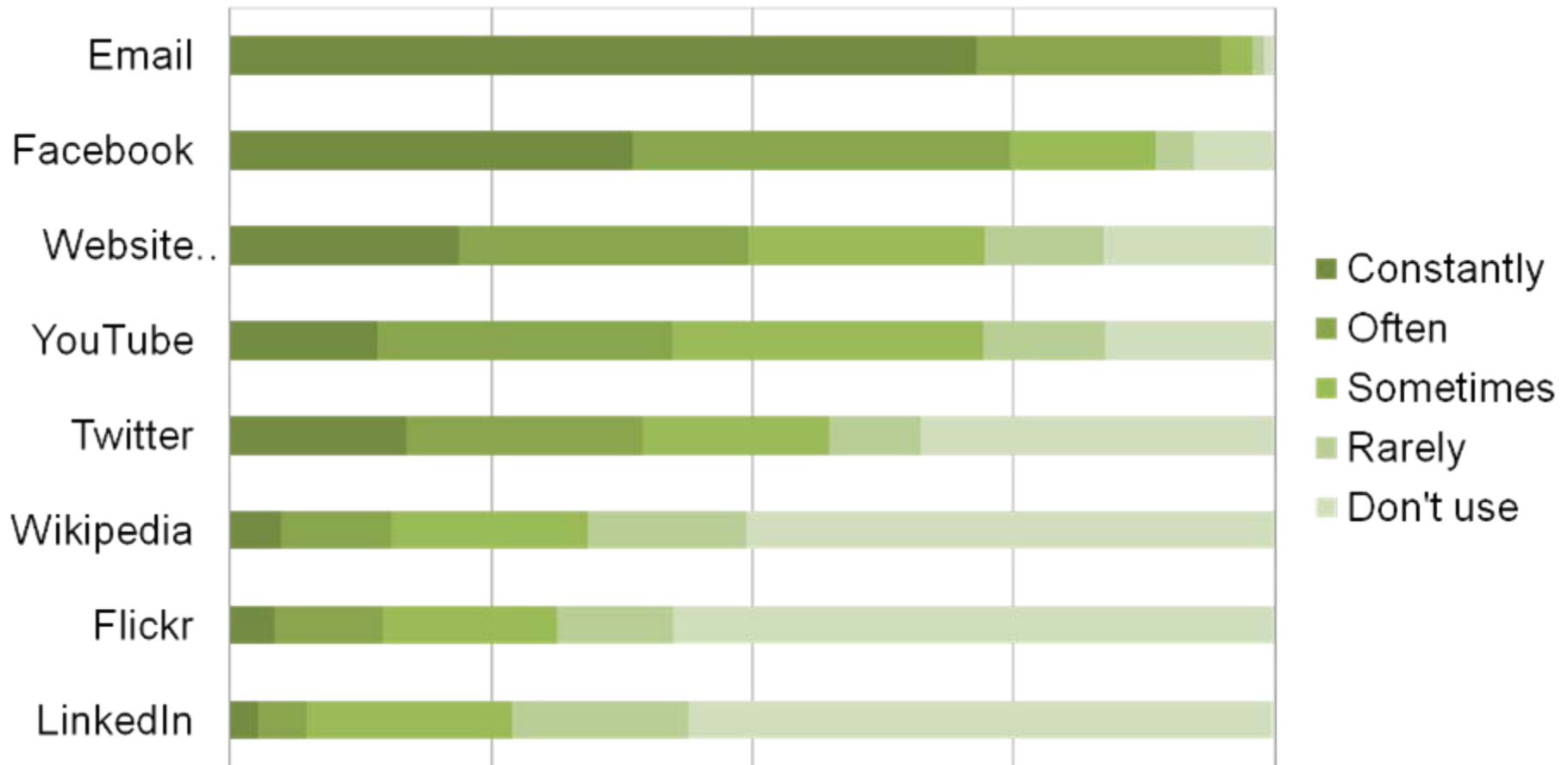
About the respondents: type of arts group



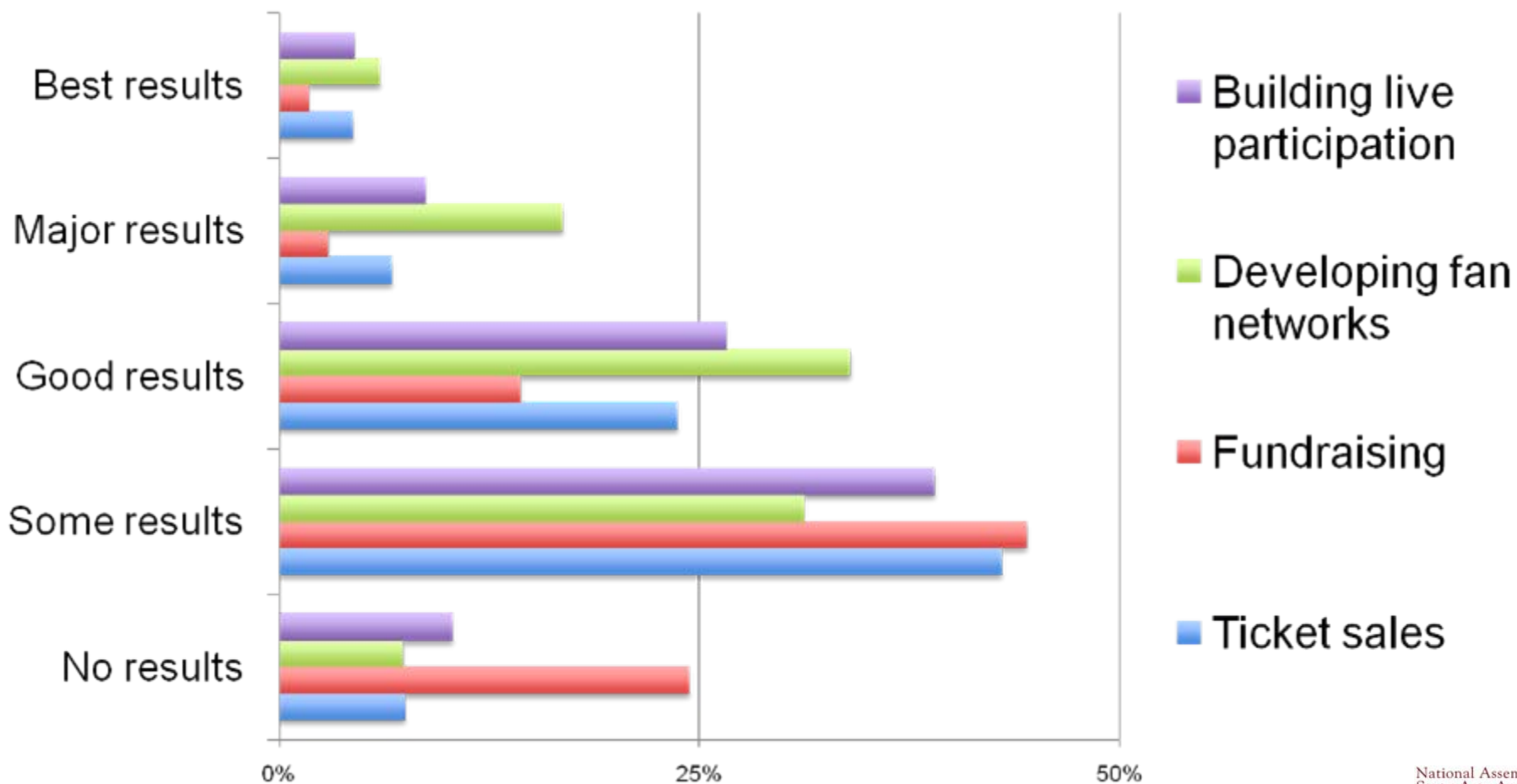
About the respondents: operating budget



What channels are they using?



How's this working out?



How's this working out? (continued)

- A mid-sized ballet company in California sold out in-studio events using only social media.
- A small visual arts organization in Washington State sent an email plea for an undersold concert—enough responded to turn it profitable.
- An arts presenter on the west coast did away with a print brochure and got into social media. Ticket sales increased by 26%.

How's this working out? (continued)

- “We now employ a full time New Media Manager and a part time Media Producer on staff.”
- “Our best experiences are positive feedback we get from patrons after seeing a show.”
- “We surpassed our goal in record time and had thousands of fans visit us for free!”
- “We broke our box office record by holding a 48-hour sale that we promoted using Facebook, Twitter, blog posts, and YouTube.”

Internal attitudes toward digital media

- Respondents report positive attitudes on the part of management
 - 65% said management is “excited” about it
- Less than 7% report internal “resistance”

Internal attitudes toward digital media (continued)

- Less than 1/3 reported getting into (or struggling with) digital media as a result of pressure
 - 30% said “our audience expects it of us”
 - Approximately 1/4 driven by peer or competitor pressure
 - Just under 1/4 daunted by the technical aspects

Do organizations' staff have time and willingness to manage digital and social media?

- National: almost half of respondents feel that their staff does not have the time or willingness to properly engage
 - 30% thought so somewhat, 11% thought so, 7% strongly (almost 50% overall)

Website management and mobile platforms

- Just over half of respondents manage their websites through “internal, proprietary or custom-built solutions” (51%)
- Only a small number use open source systems (10%)
- Use of mobile-accessible applications is on the rise
 - Social mapping tools (38.8%)
 - Virtual tours (8%)
 - Interactive experiences (contests or games) (21.3%)

What is communicated and ways to measure

- Social media is being used to increase attendance and enhance the experience
 - Providing background on programming (76%)
 - Last minute ticket deals (71%)
- Groups are measuring online activity and social engagement
 - Coded offers (25%)
 - Email response tracking (65%)

Are digital and social media delivering on their promise?

- 40% thought so, 30% strongly (70% in total)

Conclusions and early insights

- The next hurdle: integrating digital communications into a holistic policy
- Arts groups have moved from experimenting to gaining confidence to present what they know
- Groups shouldn't take on interaction unless they can deliver:
 - Looks bad if they're not active in the conversation
 - They may not need to converse in all the ways digital media allow

Conclusions and early insights (continued)

- Consider what is measured and why
 - Organizations are beginning to measure engagement and interaction
 - Quality is more valuable than quantity: online communications work in multiples
 - The hard part is finding and engaging the influencers

Conclusions and early insights (continued)

- Approaches that grantmakers can use to help arts organizations integrate digital communications into a holistic policy. Look for and promote:
 - Alignment with organizations' core mission and values
 - Well-defined target populations
 - Opportunities for mobilizing support

Conclusions and early insights (continued)

- Look for and promote:
 - Wise allocation of resources
 - Encouragement of fans, followers and interested observers
 - Measurement of impact and interaction

What's next

- If you haven't invited arts groups in your state to take our survey, please do! Visit our website to learn more or to get in touch (trudelmacpherson.com)
- Follow us on Twitter (@smartaboutart)
- Watch for our results in the fall

Audience Questions

Use the “chat” box.

Stay Tuned!

**For information on
future web seminars**

Check the NASAA website for updates!

Thanks for participating!

Questions or comments about this session? Contact Eric Giles,
Learning Services Manager (eric.giles@nasaa-arts.org).

Many thanks to NASAA's member states and today's guests for making this session possible. The work of NASAA and of state arts agencies is also supported and strengthened in many ways through funding and programming partnerships with the National Endowment for the Arts.