

Put your organization  
name and logo here

# MARKETING PLAN [insert the years covered, here]

## ABOUT THIS RESOURCE

This Marketing Planning Guide forms part of the **Country Arts WA CircuitWest Venue Managers' Toolkit** and has been designed to assist regional arts and cultural venues to write new, or to revise existing, Marketing Plans.

NOTE: Marketing Planning works best when played as a team sport. Involve your staff and representatives of key stakeholder groups like your Board and/or your Council management team. Keep the group to no more than about 8 people to maximize productivity.

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*[edit this content index according to your own content needs]*

## Organisation Name

*(complete these statements with excerpts from your Business or Strategic Plan if you have one, or perhaps relevant excerpts from Council's Plan or Cultural Plan if you're managed by local government)*

**Our Vision**

**Our Mission**

**Our Principles or Values** are

**Our Brand Statement** is

**Our Business Plan Goals for 20XX – 20XX** are:

## Marketing Plan Executive Summary

The Executive Summary is a one-page summary of the key points contained in the Marketing Plan: you write this last. It should give the reader a sense of the main points in your plan, including your goals and strategies and your broad implementation schedule over the years covered by the plan.

## Background

Provide the reader with a background to your organisation's current position and outlook over the planning period, noting any big-picture issues. This is the place to highlight any major new initiatives or challenges. Two to three paragraphs are usually sufficient.

## Market Analysis

[NOTE: If this Marketing Plan is being written based on an existing Business Plan, read the External analysis section of the business plan and use that as the starting point for this Market Analysis, from a more detailed Marketing perspective. This section should be based on research and evidence, to describe the size, scope and key characteristics of the total potential market for your products or services.]

### External Analysis:

#### Scope and features of potential market:

Describe your potential market: population size, geographic spread, (e.g. of your 'catchment area'\*) number of segments, demographic characteristics, impact of current economic conditions, trends, growth or decline, changes in characteristics, etc. Half to one page is usually enough.

*\* if you're in regional or remote Australia your catchment area may be a radius of several hundred kms or more around your venue. If you're not sure how far people travel to attend your events, you should check home addresses in your database, or start collecting them if that's not part of your usual routine.*

#### Opportunities

Outline any 'external' opportunities present in the current market, or forecast to occur within the planning period. Is there demographic change in your community? Are these new residents more likely to engage with what you offer? Is the economic climate improving? Are people willing to spend more now? Is there a new Council staff member in Community Development who is keen to work with you? etc.. about half a page. (These opportunities would be identified as part of a SWOT analysis. See SWOT analysis in the glossary if you're unsure what this is.)

#### Threats

Outline any 'external' threats present in the current market, or possible future threats within the planning period. Is the economic outlook bad? Are demographic changes reducing your likely audience? Is your state government cutting arts funding? etc ... about half a page. (These threats would be identified as part of a SWOT analysis.)

#### Competitors

Describe any existing or forecast future competitors: remember to include possible substitutes where your customers may spend their time and money instead of coming to your events (e.g. hotels, restaurants, cinema, sporting events, as well as direct competitors such as other arts events). Also remember that some competitors can make great strategic partners. For example you could do a deal with your local cinema to make special offers to their customers for your events. Outline your basic strategies to overcome or deal with the competition described.

## Internal Analysis:

Describe your existing internal situation in relation to the marketing function: its position within the organisation structure, staffing, knowledge and experience, relevant resources such as website, databases, ticketing systems and other software; existing marketing activity and 'product' offerings. Include **Strengths** and how you'll use them to your advantage, and **Weaknesses** and the steps you'll take to offset them or improve in these areas. (These strengths and weaknesses would be identified as part of a SWOT analysis.)

## Customer Research

Provide a summary of the key points you have learned about your customers, what kind of experience they have with you, and what they think about you. Include relevant data such as customer recency\* and frequency\*, demographic\* characteristics, any changes in opinion noted, satisfaction and loyalty benchmarks, etc.

If you don't have research-based evidence of customer attitudes\* and motivations\*, consider including a program of customer/audience research within this Marketing Plan. Researching your customers to help deepen your understanding of their needs can help improve the effectiveness of your marketing activities, and should probably be done at least once every 3 to 5 years to ensure you keep in touch with changing demographics and attitudes.

*\* these terms are defined in the Toolkit Glossary*

## Brand Statement or Brand Essence

You may not have thought consciously about your brand or what it is, but that doesn't mean you don't have one. (Your brand is not your logo – and your logo is not your brand. Your logo is meant to be a visual representation of your brand.) Your brand exists in the minds of your customers and stakeholders: it is the essence of what they think of you, of how you make them feel. The brand you want to have may be different from the brand you currently actually have in the minds of your customers. In order to change this situation, you need to have a clear understanding of how your customers think and feel about you, and a clear picture of the brand as you would like it to be. The brand needs to be firmly rooted in reality: you can't build a brand that is contradicted by every experience your customers have with you. If you want to change the way your customers feel about you (i.e. change your brand), you have to change every customer touch point. Every time a customer sees you, visits you, talks to you, receives an email or flyer from you, in other words every experience the customer has with you, must reinforce the brand.

Writing down a concise statement of your brand (also known as your 'brand essence') is important for communicating the brand amongst your staff, to help them 'live it' in their work, and for informing all of your marketing communications. It's not always an easy process. You need to start with a history of the organisation, and listen to the way long term customers and stakeholders describe the way it makes them feel.

Focus groups can be a good way to get at this information, if you use an experienced focus group researcher. After the focus group report you might gather a small group of staff, including people who have been with the organisation the longest time, and have a brainstorming session to 'distil' the information you have collected about your brand and its history. You could write words on a whiteboard, words that seem to sum up the 'essence' of your brand.

The final statement that you're aiming for should be no more than a couple of sentences at most. Sometimes one or two people will need to work at the statement over a period of time to refine it, until you're happy with it.

Remember the brand reality test: it has to be believable, it has to feel like the real 'you', and you have to be able to 'live it' in everything you do.

**Creating a tagline\*** can be a great way to reinforce a brand. A tagline is a short phrase that communicates something of the essence of your brand. One of the best-known examples is Nike's 'just do it', which communicates one of the best ways to think about (or not to think about!) your exercise routine.

Here are some arts examples:

**EXAMPLE Brand Statement:**

*"Providing the most surprising, delightful and rewarding experiences in town, XYZ Arts Centre delivers memorable arts events for families, couples and young singles in the greater XYZ region."*

**EXAMPLE tagline:**

*'the awesome power of the voice'*

This tagline was created for Sydney Philharmonia Choirs in the 1990s, based on focus group research with audience members. The aim was to communicate the essence of the experience and how it differed from other classical music offerings in Sydney. It was used for about 5 years across all their marketing material.

## Segmentation

Provide an analysis of your customer base by segments, describing the key characteristics of each segment, including their relationship with you. Remember the most effective segmentations group customers with different and distinctive needs together, so that you can relate to and communicate with each group, tailored to their needs.

In addition to this description, you may like to provide a summary of your approach to each segment:

**Our Goals in marketing to this segment:**

**Our Approach in marketing to this segment:**

**Benefits sought by/needs met for this segment:**

**Key messages for this segment:**

FOR EXAMPLE:

Segment: **Adults 70+ with conservative tastes in music**

Goals in marketing to this segment: **maintain attendance when they no longer go out at night**

Our approach in marketing to this segment: **provide accessible experiences at affordable prices**

Benefits sought by/needs met for this segment: **daytime experiences, with friends and refreshments**

Key messages for this segment: **great value for money, bring your friends, morning tea included in ticket price**

## Product offerings + target markets + pricing

Provide an overview of your 'product offerings' showing which segment/s each targets, and outlining the prices for each.

FOR EXAMPLE, for the above segment Adults 70+

Product: 'Morning Melodies' concert series, 11.00am mid week

Pricing: \$20 seniors/pensioner single ticket price includes morning tea

Packaging: to encourage more frequent attendance, we will offer flexible packages, to include a minimum 3 events, with sliding scale discounts (the more events in the package the greater the discount) – customers choose which Morning Melodies events to include in their package.



## Marketing Goals and Strategies

If you are writing this Marketing Plan as a supplement to an existing Business Plan, start by identifying the Business Plan goals that are relevant to marketing. Develop your marketing goals from there. If there is no existing Business Plan, it would be a good idea to develop one. In the meantime, you will have to develop your marketing goals based on what you want to achieve in terms of factors like audience attendance, loyalty, or revenue. Try to keep it to no more than 3 or 4 big-picture goals. Remember goals need to be “SMART”: Specific, Measurable, Achievable, Realistic and Time-bound. It can help to think of goals in terms of what you would like ‘to be, to have, or to become’.

Next, think about what reaching each goal will look like. What will be the best measure (KPI – Key Performance Indicator) for each goal? Remember measurement needs to be effective but relatively easy. *Note that measuring public awareness or general public opinion usually requires market research.* When you’ve identified the appropriate measure for each goal, then look at past performance: what is realistic, and achievable, but a bit of stretch, in terms of a KPI for each? Build in realistic, achievable but moderately ambitious KPIs for each year. Remember that increases in achievements often require increased resourcing (staff, budget, technology). Use this matrix to lay out your marketing goals down the left hand side, with annual KPIs for each.

EXAMPLES: ‘to become well known throughout our region for the quality of our family entertainment’, ‘to have a loyal audience’, ‘to have an increasing audience’, ‘to have increasing ticketing revenue’, ‘to be a welcoming community hub with a diverse audience’, etc..

	KPIs			
GOALS	measures	2015	2016	2017

Once you have a set of goals you’re happy with, you need to brainstorm a range of possible strategies to use to achieve your goals. One good way to approach this is to use a Strategy Map, as suggested on the following page. This allows you to assess how effective your strategies will be in achieving multiple goals. The more strategies you can create which work to achieve multiple goals, the more efficient and effective your marketing efforts will be. Try to keep the number of strategies under control: most small to medium arts organisations should be able to cover their marketing needs with no more than about four to six effective marketing strategies.

## Strategy Map

Use this map template to lay out your strategies across the goals that they are designed to reach. Configure the strategy boxes accordingly. (Aim for no more than 4 to 6 strategies). Prioritise strategies in order of anticipated impact, with the most effective at the top.

<b>Goal 1</b> Write your goals in these boxes across the top	<b>Goal 2</b>	<b>Goal 3</b>
<b>Strategy:</b> e.g. offer events in packages		
<b>Strategy:</b> write your strategies in these boxes and shape them to fit across the goals they're designed to achieve.		
<b>Strategy:</b> e.g. focus on digital marketing and track results		
<b>Strategy:</b>		
	<b>Strategy:</b>	
	<b>Strategy:</b>	

## Marketing Action Plan

Lay out your chosen marketing strategies down the left hand column, one strategy per box. Move across to the Key Activities/Tactics column and work out the key activities you need to carry out to enact each strategy. Allocate a priority (1, 2 or 3) to each activity, timeline and milestones, and who is responsible for each activity. Don't forget to identify how you're going to evaluate the success of each tactic in the Tracking/Evaluation column.

Strategy	Key Activities (TACTICS)	Priority	Timeline + milestones (when)	Responsibility (who)	Tracking/evaluation

After completing a Marketing Action Plan, some organisations like to use it as the basis for developing and completing Work Plans for each staff member who will be responsible for enacting it.

This can be a good way to test whether you have sufficient staff resources to carry out your Action Plan. (If you don't have the resources to action every strategy, go back and adjust your strategies – you might need to cross off the last-listed, least effective one or two. One of your goals might then become 'to find sufficient resources' .. )

If you find your Work Plans are unmanageable or unreasonable, put aside the lowest priority items and focus on completing the highest priorities, before you then assess whether you can also achieve the lower priority actions.

## Marketing Resources

### Staff

Describe the staff resources you have for marketing here. How many hours per week, or how many equivalent full-time positions? Do you pay any outside consultants? List everyone who contributes to your marketing efforts, with their title, name and hours worked on marketing tasks.

### Technology

Describe your relevant marketing-related technology here: CRM, ticketing system, website, email personalisation software, etc

### Budget

Provide a summary of your marketing budget, excluding staff costs

	2015	2016	2017
<b>Marketing</b>			
e.g. website hosting + design			
email campaign software			
social media			
ticketing software licences			
printing + design			
mailing costs			
advertising			
audience research			
professional development			
<b>TOTAL</b>			

## Particular Communications strategy summaries: (optional)

### MEDIA Strategy and Protocols example:

You may like to add components to describe your strategies in particular areas such as media relations, and social media. Some Councils will require you to develop policies or protocols in these areas before you are allowed to implement strategies. Remember to state the relevant goal/s, strategies and actions from the plan above, to ensure your activities in each of these component areas stay consistently on track with your over all Marketing Plan.

#### GOAL and KPI:

Goal/s	KPI/s

#### STRATEGY and ACTIONS:

Strategy	Actions

#### Notes on Goal and KPI:

The first task in selecting which media to target is to define the target audience/s for media stories. Whose awareness do we want to raise, and about what? What actions do we want to result from the media coverage: attitudinal change? Ticket sales? Awareness? How will you measure and evaluate the effectiveness of your media strategy?

Outline your **Media Management process**, for example:

1. Story ideas are generated in discussion between ....
2. Timeline for placement of these stories is planned
3. Journalists/specific media are assigned for each story
4. Story is researched and developed by....., others as appropriate
5. Media release/story pitch is written by ...., reviewed by .....
6. Media release is emailed to targeted journalists by .....
7. Follow up phone calls are made to journalists by .....
8. Interviews and photographs are arranged as required with the journalist, with approved spokespeople, by .....

And a process for **incoming media enquiries**:

All phone calls from journalists outside of the process described above should be referred to .....

## Social Media example: TWITTER strategy

### Relevant GOALS and KPIs:

Goal/s	KPI/s

### STRATEGY and ACTIONS:

Strategies	Actions

Outline your strategy for Twitter use here. How will you link the content of your tweets to your other marketing activities and objectives? How will you make it strategic? Do you expect it to result in ticket sales, or will you focus primarily on customer engagement and conversation? Who will have access to your organisation's account? Will anyone need to approve each tweet before it goes?

### Targets for Twitter:

Describe your targets here: how often will you tweet? What hashtags will you use?

Will you use trackable links back to your website to measure click-throughs?

How many followers will you aim to have, and by when? How will you measure and evaluate the effectiveness of your Twitter strategy?