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ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

Managing an Organizational Rebrand

December 2023

Research Methodology

Research Question

How have arts and cultural organizations used the moment of a name change to enhance brand awareness, build audiences, and deepen market differentiation?
What steps and resources were required to complete the name change process?

To investigate these questions, we conducted the following research:



Secondary research to gather examples of organizations within the arts and culture field who have recently changed all or part of their names.



Interviews with 11 organizations with recent organizational name changes, covering the following topics:

- **Why:** the impetus and catalyst moments for changing an organization's name
- **How:** process of and key participants in changing the name and rolling out the new organizational identity
- **Impact:** the name change's effect on key strategic areas, including audiences, donors, and programming

Research Participants



Boston Symphony
Orchestra*
Boston, MA



Global Arts Live
Boston, MA



La Jolla Music
Society**
San Diego, CA



Orchestra Lumos
Stamford, CT



Orchestra Sinfonica
di Milano
Milan, Italy



Performing Arts
Houston
Houston, TX



Plimoth Patuxet
Museums
Plymouth, MA



ROCO
Houston, TX



Segerstrom Center
for the Arts
Costa Mesa, CA



Stages
Houston, TX



Washington
Performing Arts
Washington, DC

*Boston Symphony Orchestra completed a rebrand without changing their institutional name. We interviewed them to gain insight into the relevant aspects of undergoing a visual rebrand.

**La Jolla Music Society started a rebrand process but decided not to change their name at the time. We interviewed them to understand the decision-making process behind choosing to keep their name.

Research Participants' Name Changes

New Institutional Name	Former Name
Global Arts Live	World Music/CRASHarts
Orchestra Lumos	Stamford Symphony
Orchestra Sinfonica di Milano	L'Orchestra Verdi (La Verdi)
Performing Arts Houston	Society for the Performing Arts
Plimoth Patuxet Museums	Plimoth Plantation
ROCO	River Oaks Chamber Orchestra
Seegerstrom Center for the Arts	Orange County Performing Arts Center
Stages	Stages Repertory Theatre
Washington Performing Arts	Washington Performing Arts Society

Key Takeaways

- **Bake in time for initial research:** Early in the planning process, organizations should budget time to thoroughly survey their audiences, donors, board, and other key stakeholders to understand current brand perceptions and awareness. Ideally, and if resources allow, this is a productive moment to learn from the general public as well, via panel surveys. This research will help inform the direction of the rebrand and promote buy-in from important constituents.
- **Budget considerable resources:** A rebrand often includes fees for consultants, research, PR, and creative design for campaigns and collateral materials. Our research participants reported total expenses ranging from \$85,000 to \$250,000 for a name change. Staff time devoted to these projects is also considerable, with most organizations spending 1-2 years working on the project.
- **Have clear leadership:** While it is important to get staff-buy in and include diverse voices, it is ultimately an empowered leader or leadership team managing the rollout of the project with the authority to make the final decisions. At many organizations, the marketing department led the name change with the support of the executive team.
- **Manage staff and board expectations:** Gaining staff and board input in the early research phase can help secure their buy-in to the project and align on brand values. These groups can then be brought back into the process when the designs and ideas have reached maturity, for final feedback. It is best to avoid too many divergent voices at the heart of the design process when key decisions must be made effectively.
- **Leverage key institutional moments:** Several organizations timed their rebrand with new strategic plans and/or capital campaign projects. These combined efforts ensured that the new name aligned with the most updated organizational values and had sufficient financial backing. Other institutions paired a rebrand with new leadership and new programming, heralding new directions for these organizations.
- **Pick a rollout model that works for your community:** Some organizations chose to pair the launch of the new name with a key event, celebration, or season opening; others managed a more staggered unveiling. The choice will likely depend on how your audiences and stakeholders are used to receiving major news.

Additional Advice

Name considerations:

- Many organizations chose to keep or add their city to their new name to ensure that their location is as obvious as possible.
- Consider the acronyms that might come from the new name — are these acronyms associated with other brands or will they form words that may lead to confusion for those who are not already familiar with your organization?
- Once you have a new name in mind, purchase the associated URL(s) as soon as possible, and before investing resources in designing/testing around that name.

Research partners:

- Engaging a research partner throughout the entire name change process (instead of only one or two stages) allows the firm to have a fuller understanding of your organization, leading to more in-depth research outcomes.
- Take the time to lead a rigorous process to choose your research partner and creative agency — these groups must work together effectively.
- Really consider what additional expertise an external partner brings to the table versus which aspects of a name change your team should lead with their deep understanding of your organization. In certain cases, organizations felt that managing consultants was not worth the resource and effort.

Staff involvement and final decision makers:

- Having the full staff involved in some way facilitates generalized buy-in and excitement for the change.
- It is important to be transparent about when and why you involve staff at certain moments and not at others. Set clear expectations.
- Make sure the group leading the name change is empowered to be the decision makers. There can be strong dissent across constituents on these types of decisions, which can lead to many iterations and loss of essential time.

Timelines:

- Budget time in your project plan to conduct a deep investigation of what audiences and donors connect with at your organization.
- Having a set timeline with clear targets helps keep the team on track and avoid second guessing.
- Building your timeline backwards from a launch date, with key targets to achieve along the way, can be an effective mode of project planning.

Report Outline



Why (and When) to
Change a Name



Process: Who Is
Involved?



Process: Choosing
a New Name



Process: Rolling
Out Your New
Identity



Cost, Timelines,
and Impact

Section Outline



Why (and When) to Change a Name

In our conversations we heard four main reasons for changing institutional names and going through a rebrand. In this section, we highlight examples of each of the following catalysts:

- Resolving issues of brand awareness or name confusion
- Abandoning terms that are outdated or exclusive
- Heralding a new institutional chapter
- Embedding a name change in a strategic or capital campaign

Resolving Issues of Brand Awareness and Clarity

Lengthening the name to be more descriptive

L'Orchestra Verdi → Orchestra Sinfonica di Milano

Issue of association: Verdi was primarily an operatic composer, so associating his name with a symphony led to confusion.

Issue of name comparisons: In Milan there are many organizations with an association to Verdi in their name.

Hyper-localized: Over the years, the orchestra had developed the local nickname of “LaVerdi,” which was unclear outside of Milan.

✓ **Clear activity:** The orchestra’s new name now clearly states the genre in which the organization performs.

✓ **Distinct name:** With the new name there is no confusion with other ‘Verdi’-associated organizations.

✓ **International recognition:** The genre and geographical clarity of the new name enhances the ability to build the brand internationally.

Simplifying the name to focus on product

World Music/CRASHarts → Global Arts Live

Long and unclear: The previous name was long and cumbersome, while also being somewhat non-specific.

Confusion with other events: “CRASH” led to confusion when naming events. Their CRASHfest festival shared its name with a monster truck rally.

Issues of tone: Constituents found the word “CRASH” to have an aggressive connotation, and the sector was moving away from “world music” as a term.

✓ **Condensed and clear:** This new name succinctly indicates their focus on global performing arts activities.

✓ **Distinct and appropriate:** With more genre-specificity, SEO and marketing is less challenging for the organization.

✓ **More inclusive name:** The new name avoids dissonance in tone and contains updated language for their genre of music.

Revisiting Outdated and Exclusive Terms

Replacing Terms

Plimoth Plantation → Plimoth Patuxet Museums

- ✓ **Connotations of a word:** While in areas of New England the word “plantation” refers to colonial settlements, in most other areas of the United States the word connotes the use of forced labor.
- ✓ **The work of managing reactions and addressing confusion:** Given this nuanced definition of the term “plantation,” staff often found themselves dealing with uncomfortable reactions and having to explain their work — particularly when traveling outside of Plymouth.
- ✓ **An inclusive and historically accurate alternative:** To be inclusive of Indigenous history, the team found a historically accurate alternative to the word “plantation” in the word *Patuxet*, which honors the site’s pre-European history and name.

Removing Terms

Washington Performing Arts Society → Washington Performing Arts

- ✓ **Acknowledging shifting perceptions:** The word *society* used to have a more inclusive communal connotation, but today it can symbolize more exclusive group memberships.
- ✓ **Focus on core activities:** By simply removing the word “society” the organization can focus on their core activities of performing arts, which then feels more open and inclusive to the whole community.
- ✓ **Additional tagline to emphasize their core activities:** The organization’s new tagline, “*We make it happen*,” supports this more inclusive brand while adding to brand differentiation and awareness (particularly important as a presenter without their own venue).

Heralding a New Institutional Chapter



Leveraging the arrival of a new music director

Stamford Symphony → Orchestra Lumos

With the arrival of Music Director Michael Stern, the orchestra took the opportunity to start anew as Orchestra Lumos. This included:

- A new mission statement
- The expansion of its musical activities and community programs across Fairfield County
- Renaming certain programs to remove jargon that would only appeal to music aficionados
- Increasing its more appealing Pops events

Along with these changes, a name that broadened their association beyond Stamford was necessary, and Orchestra Lumos was born.



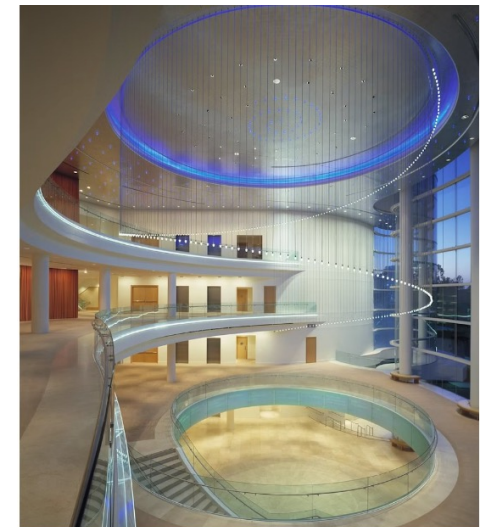
Celebrating a new venue and family legacy

Orange County Performing Arts Center → Segerstrom Center for the Arts

During the organization's 25th anniversary year, the founding family funded the opening of a new venue:

- A new concert hall housed resident companies
- Revamped campus buildings included a theatre, dance center, education center and outdoor plaza for free events

The organization's opportunity for artistic programming and impact expanded greatly as a result. To mark this legacy, the family's name was adopted for the campus as a whole.




Embedding the Rebrand in Larger Institutional Campaigns

Incorporating a renaming process as part of a strategic plan

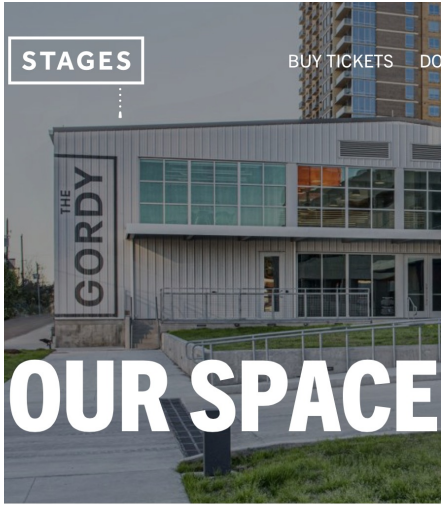
Leveraging a major capital project to include a rebrand



- Combining the renaming process with a strategic plan served as a total refresh for the organization, using the new brand as a **visual signifier for the new strategic directions undertaken**.
- The timing of the rebrand and strategic plan also coincided with the **pandemic period and arrival of a new CEO**, allowing a period of pause before major institutional change.
- A focus on **elevating and concretizing the identity of the organization** was purposefully included within the structure of the strategic plan.



- The organization previously desired a rebrand, but **waited for the right moment to tie it to a larger initiative**.
- The **budget for a new venue** set to open in 2020 included funds for a rebrand and new name. A new brand would also **elevate the visibility of new building**.
- Stages had existed under its previous visual identity for 10+ years and had not had the funds to pursue a comprehensive rebrand process alone — **tying to the capital project allowed for more financial support**.



Section Outline



2

Process: Who Is Involved?

Staff and board involvement is crucial for a productive and well-received name change. Across our calls, we heard several important considerations and decisions about who to involve in the process:

- Determining the leaders who should manage each aspect of the project
- Soliciting cross-functional input from the full staff
- Involving your board in an intentional and productive manner

Who Manages an Organizational Name Change?

Across our calls, two departments emerged as the most common co-leaders of an organizational name change emerged: marketing and the executive team. Importantly, the responsibilities of these groups differed in key ways.



Strategic Vision Group

Key Players: CEOs and/or General Managers

Overall objectives:

- Understanding and promoting the project's urgency
- Fostering organizational buy-in
- Supporting on initial ideation and vision for the new name

Key moments of involvement:

- Identifying potential external partners at the start of the project
- Connecting with the board to manage communication of project updates throughout the process



Tactical Implementation Group

Key players: Marketing Directors with marketing team support

Overall objectives:

- Managing the project timeline and day-to-day tasks
- Working with creative consultants
- Providing final decision-making and rollout steps

Key moments of involvement:

- Kickstarting ideation process and aligning on trajectory
- Managing external partnerships
- Working with staff, graphic designers, etc. to set outcomes
- Project planning the rollout of the new name

Approaches to Staff Engagement

Staff involvement is critical to the success of a name change. There are several ways to engage your team to build momentum while not confusing the process with too many divergent voices. These approaches may be combined at different points of the renaming process.

Start of Process

Approach 1: Team Values Input

- ❑ Open process with deep staff study on values and vision
- ❑ Gain early insights into core values and perceptions
- ❑ Use this knowledge for brand development

“We did a comprehensive strategic planning process before the name change, and staff and board were heavily involved in that.”

“Lots of the language that informed the branding process came from our initial values work with our staff.”

Throughout the Process

Approach 2: Collaborative Ideation

- ❑ Consider opportunities for ongoing input, to socialize idea of rebrand
- ❑ Offer 1-1- meetings for individual input or cross-function meetings
- ❑ Does require final decision-makers

“We organized a bunch of staff meetings at various times to solicit feedback, we also offered time to meet 1:1 with project leaders.”

“We didn’t form a specific naming committee. We just kept the conversations open with different leaders and departments heads.”

Approach 3: Soliciting Concrete Feedback

- ❑ Limit staff involvement to avoid complications – and have clear project leaders
- ❑ Re-engage staff once project has reached certain maturity
- ❑ Solicit concrete feedback on key ideas

“We formed a small group of staff, that was the primary group for moving the branding forward. This group worked closely with the brand agency.”

“We wanted to start to ideate, and narrow things down, then expanded the conversation from there to solicit feedback.”

Managing Board Expectations of Involvement

The extent of board involvement in the rebranding process varied and was determined more by the nature of the board’s governance practices and expectations. Board members can serve as strong advocates for the project and can help push for initiatives and support on fundraising, but leaders should involve them in a way that does not lead to too many voices in the decision-making process.



Here are a few productive tactics we heard for optimizing board involvement...

Who to involve from boards

- ✓ **Securing consensus and support**
“Consider involving board members that have a lot of social capital and esteem to help bring about consensus with the whole group.”
- ✓ **Picking a core group**
“We hand-picked a small group of trustees and advisors to look at the work as it was starting to be finalized so we could incorporate the board’s input.”

How to involve boards

- ✓ **Involving the board as advisors**
“It is important to be very clear with them about the extent of their involvement as advisors not as decision-makers.”
- ✓ **Leveraging board expertise**
“A board member who owns a consultant company came in and led a lunchtime brainstorming session with our full staff.”

When to involve boards

- ✓ **Align board towards end of process**
“As we reached the end of the process and had more alignment, we had a board weekend where we shared a highly condensed version of the process.”
- ✓ **Soliciting feedback at key stages**
“Asking for feedback towards the end of the project went a long way to make everyone feel comfortable and included.”

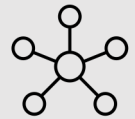


Considerations to involving the board in the process

- As a group, boards can often hold strong opinions. When would these perspectives be more valuable? When might they slow down or over-complicate the process?
- In what ways might the composition of your board (and therefore their opinions on name/brand) differ from your wider community?

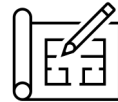
Tactics for Board Involvement Over Time

Organizations have established several useful practices around when to solicit input and how to make board members feel heard and involved – without handing off too much authority for making the final decision.



Encouraging Initial Ideas:
Before launching a branding process, it is recommended to conduct a thorough investigation into how people connect with the organization.

Tactic: Setting up the Why (opportunity for board input)
This is a great moment to solicit input from all stakeholders, including board members, around the values and “why” of a potential new brand. This is a time where more input is welcome.



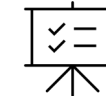
Pushing Forward the Design:
Once the decision to move forward is made, it is best to limit the number of people involved in the ideation and design phase so the process can move forward more efficiently.

Tactic: Empowering the Leadership Group (limited/no board input)
It is essential to have a leadership group that identifies consultants and works closely with them in this creative phase. The board should be made comfortable with the decision-making authority of this group.



Opening-Up to Feedback:
As the brand is being developed and ideas have reached a more mature phase, this is an opportunity to solicit feedback and share progress updates.

Tactic: Soliciting Feedback (Opportunity for limited board input)
While it is important to welcome feedback to bring board members along before a brand launch, it is critical to remain clear about who has the final decision-making authority.



Presenting Final Product:
Once you are ready to launch with rollout of the new brand identity, this is an occasion to have final meetings and 1-1 discussions with board members to explain the final results and the next steps.

Tactic: Final 1-1 Conversations (board voices heard, no change input)
While the rollout is underway, this is an opportunity to address lingering nay-sayers or doubts. Having private conversations allows people to feel heard – without making promises that this will lead to any major change of the brand.

Section Outline



Process: Choosing a New Name

Once the individuals involved in the process have been established, the brainstorming begins. In our conversations, we heard several key considerations and “ingredients” needed to have a thorough and thoughtful ideation process:

- Determining clear criteria for a new name
- Leading a brainstorming process that involves all staff members
- Gathering audience and stakeholder input
- Identifying effective external creative and research partners

Determining Criteria for New Name to Guide the Process

The decision to change an organization's name can lead to an overwhelmingly blank slate. Many organizations managed the ideation and brainstorming phase by focusing on a few key criteria that the new name should include — or issues the name should resolve — as a way to focus the direction and creative naming process.



New name to resolve concerns around clarity and content

- Name should be more concrete and representative of their core activities
- Name should indicate where they are located

With those clear criteria to meet, the naming process became more straightforward and was managed efficiently without clashing concepts.



PLIMOTH
PATUXET

MUSEUMS

New name to resolve concerns around meaning and connotations

- New name should be inclusive of the museum's educational mission
- Name should be indicative of its historical connections to indigenous land

Patuxet was an early suggestions to match the museums new vision, and making museums plural was a quick decision to encompass all programs.

Approaches to Brainstorming

“We went into the process with a top few options in mind. We didn’t end up with a huge departure, but we looked at some radical options in the brainstorming process”.

To create an initial long list of potential name options, Performing Arts Houston applied three approaches to their brainstorming process with a few key guidelines in mind.

Guidelines to direct the new name:

- ✓ We are a nonprofit
- ✓ We are in Houston
- ✓ We want to be recognizable.

Approach 1: Looking at more obvious, ‘easy’ options

Performing Arts Houston had a small group of staff develop a list of about 10 more obvious contenders. These were easy and logical options that did not represent a huge departure from the old name, such as “Live Arts Houston.”

Approach 2: Agency proposing more creative, “out of the box” options

To provide additional options beyond the more obvious choices proposed by staff, the brand agency went through a rigorous process with a rubric of categories that helped develop their naming ideas. They had everything from “safe” to “risky” name ideas.

Approach 3: Pure ideation

Finally, Performing Arts Houston also did a more fluid ideation brainstorm with staff, exploring any and all ideas to see if any landed. They then added those to the mix of ideas from the first two approaches.

Additional ideas and formats to consider when soliciting ideas and brainstorming

- Staff meetings at various times of the day to solicit feedback
- 1-1 meetings to listen to individual ideas and impressions
- Mediated lunch brainstorming sessions
- Brainstorming and/or testing proposed ideas during board meetings

Gathering Audience and Stakeholder Input

Large Audience Surveys

Large audience surveys can help understand overall perceptions and barriers. These larger surveys are usually deployed in early project stages ahead of ideation design with the help of external consultant.



Confirming the need for a rebrand

- ❑ The orchestra conducted a survey with 3 groups of people: supporters/donors, subscribers, and the general public
- ❑ They used the services of a research firm for the general public survey components
- ❑ This original audience research enabled them to present the data to their board members to push for (and gain) support for a name change

Internal Surveys & Interviews

Internal surveys and interviews conducted with staff, donors and board members promote project buy-in, and set a baseline for understanding. These can be managed by internal project leaders and task forces.



Assessing internal mindsets

- ❑ To manage time-delineated goals, WPA had a process-oriented task force that managed key milestones and ensured sustained momentum and staff/board buy-in
- ❑ They deployed smaller-scale surveys over a single summer to gather internal perceptions
- ❑ Surveys were sent to a core group of stakeholders, including staff, board members and patrons
- ❑ The team also conducted 40 interviews with thought leaders to understand brand perceptions

Focus Groups

Focus groups can be conducted with diverse members of the community who act as thought leaders and can serve to raise awareness of name issues and to validate or redirect design and brand decisions.



Evaluating a new proposed name

- ❑ Plimoth Patuxet Museums conducted a series of focus groups with about 6 participants in each session
- ❑ The aim of the groups was to assess reactions to the proposed new name
- ❑ Focus groups included major donors, members, old friends of the museum, people in the group tour industry, locals from Plymouth, and teachers

Note: the use of external research firms for these efforts can be especially valuable, as constituents may feel that they can be more direct with a third party. These groups often also have access to surveying instruments (such as public survey panels) that are outside the budget scope and/or expertise of many institutions.

Case Study: A Data-Informed Approach to Rebranding

In their current rebranding process, the Boston Symphony Orchestra has taken a thoughtful approach to gathering input from a variety of internal stakeholders, current audiences, and prospective attendees. Below are the key parties involved in their rebrand; on the next page, we outline the structured process of surveying and feedback gathering that they conducted to inform their new brand identity with an eye on maintaining brand equity.

External Support

Research Firms

The BSO partnered with a strategy firm (on a pro bono contract) for support conducting initial audience segmenting, and a market research partner for the remaining research, including audience panels.

Creative Agency

The BSO identified a creative agency that was small, nimble, and independent — but also had big brand experience to be able to take the Orchestra where it wanted to be as a brand.

Having these partners work well together is crucial — the BSO asked the groups to co-author a brief to ensure that they were aligned.

Internal Team

Project Leader: Senior Director of Marketing & Brand

Project Team Members

The goal of these members is to act as the representative of their respective departments, without involving too many individuals in the decision-making process

- Chief Executive Officer
- Vice President, Marketing, Sales & Communications
- Vice President, Artistic Planning
- Chief Human Resources Officer
- Chief Development Officer
- Director of the Tanglewood Music Center
- **Marketing Team:** Director of Marketing and Audience Development, Director of Creative Services, Director of Content and Digital Services, Project Management Coordinator

“I believe strongly that these projects need a cross-functional team involved. We’re all spokespeople for our brands. Lots of people bring valuable perspectives and history with the organization. We wanted them to be actively involved in the conversations and giving feedback — and this made everyone feel really good about the outcome.”

*- Jesse Needleman
VP, Marketing, Sales, and Comms*

A conscious decision was made to involve as many departments as possible, while being sensitive to the limited time of certain leaders — specifically, the Chief Financial Officer and Vice President of Orchestras and Production.

Case Study: A Data-Informed Approach to Rebranding



Considerations when Working with External Agencies

Throughout our interviews, many organizations worked with external consultants and PR firms to manage specific areas of their branding process, from ideation on the name itself, logo design, PR campaigns, launch events, and more. While these agencies are generally helpful resources, there are some caveats to consider to ensure that the additional cost is worthwhile.

Things to discuss or look out for in consultant selection

- Have the consultants worked with Boards before? Or have they only worked with organization staff?
- Do they have a diverse team with diverse perspectives?
- Have they included accessibility in their design and planning?
- Can they be involved from start to finish? Or will you need to work with different teams across the process?
- Are they truly aligned with the organizations needs and desired outcomes?



Partners who can support on multiple phases of the project yield best results

The Orchestra Sinfonica di Milano enjoyed a successful and productive partnership with their media partner, WPP, who was able to collaborate with them on different phases of the project. This meant that the group was well-versed in the orchestra's brand and aware of the full process.



Without clear alignment on outcomes, consultants can be ineffective and costly

Washington Performing Arts had a less satisfactory consultant partnership for a variety of reasons. One core issue was that the consultants had a much bigger vision for the name change than the organization wanted, so many of their proposals did not match the institutional needs or intentions.



Work with internal team first to determine if and where consultants are truly necessary

Global Arts Live was ultimately disappointed by the outcome of their PR agency partnership, feeling that the collaboration did not yield especially creative results. The group felt that with their deeper knowledge of the organization and programming, staff could've achieved the same results at a fraction of the cost.

Section Outline



4

Process: Rolling Out Your New Identity

Once your organization has decided on its new name, the question of how to announce the change arises. In this section, we outline the two main ways in which organizations unveiled their new identities — plus, some of the lingering challenges of adoption in the public.

- Approach 1: the big unveiling
- Approach 2: the gradual rollout
- Ongoing challenges of solidifying your new name in the public arena

A Big Unveiling Moment

Across our conversations, certain organizations chose to combine the launch of their new name and brand alongside a key moment in the season or with a dedicated event to garner excitement and visibility. These inaugural events were then paired with marketing campaigns for general communication about the change.

Key Moments



Launching the brand with a new season

Orchestra Sinfonica di Milano timed the launch of their new name and brand with the start of their new season. The season opening event, where they usually welcome 1,800-2,000 people and that benefits from significant media coverage, was an ideal and highly visible moment in which to inaugurate their name.



Gala announcement for a full program update

In April 2022, Performing Arts Houston inaugurated a series of major strategic changes, including a new brand, name, and a new membership model. 2 weeks prior to the full launch, they made a soft announcement to prepare audiences for the big changes to come. At their annual gala, they made the final announcement to the event attendees, which was then more widely publicized.

Key Stakeholder Groups



Celebrating the brand with your staff

Rather than organize a big public event, Plimoth Patuxet Museums chose to unveil their brand during an annual all-hands staff event. This gathering created an opportunity with internal stakeholders (employees and volunteers) to reinforce the brand and articulate its meaning. The event also included music (with a DJ) and other festive activities to showcase the visual brand.



Unveiling the name to the national artistic community

At Segerstrom Center for the Arts, an unveiling event was held for core internal stakeholders and members of the national artistic community, including directors of peer PACs. The goal of the event was both to recognize the Segerstrom family and to elevate the brand beyond Orange County.

A Gradual Rollout Campaign

While some organizations paired their launch with significant unveiling moments, others chose to do a more gradual rollout campaigns to the public, focusing predominantly on marketing and other media/press outlets.



Global Arts Live paired social media teasers with an email and out of home campaign for maximum buzz and visibility

- Global Arts Live first launched a teaser on social media, hinting that a change was coming
- The email teaser was accompanied by an email announcement, after which Global Arts Live shared the news of the renaming with the press
- After the teaser and press announcement, Global Arts Live sent first-class letters to members, donors and key stakeholders
- They also sent printed postcards to their full list of past buyers with announcing the change, “WCMA is now Global Arts Live”
- After these initial teaser and announcements, Global Arts Live started launching more social media and emails and launched their out of home campaign.
- The OOH campaign included:
 - Digital streams at South Station and metro red line stops
 - Bus wraps
 - A campaign with WBUR

STAGES

Stages did a staggered rollout, starting with top donors before launching to the general public

- The communications strategy included tiered e-communications campaigns, starting with core donors then sharing more broadly
- Stages messaged the change with a tagline: “Welcome to our new name”



Due to the pandemic, Plimoth Patuxet conducted a soft press launch while finalizing other marketing assets

- Soft rollout via a press release with the *Boston Globe*
- 2 years to finalize other onsite assets to signal change, including:
 - New signs at the end of the driveway
 - New stationary, business cards, shirts for staff etc.

Ongoing Challenges of Name Adoption

Even after a public rollout of a new name, it can take time for the public to fully adopt and embrace this change. An in-depth, multi-stakeholder research process early on in the project can help mitigate issues before they arise, but even then some individuals and outlets continue to use the prior name. Below, we outline several tactics organizations used to navigate these challenges, and how long the confusion tends to last.

Building in time to address ongoing concerns with 1-1 meetings

Effective quick resolution

“As we revisit the potential of a new name, we have had numerous very frank conversations with a core individuals who are resistant to the change. It’s been an healthy process to learn about attitudes of long-time supporters and to ensure them that we want their opinions.”

Timeline: *ongoing*

“The people who were upset about the name change, interestingly, were people unconnected to us. We did outreach directly [via phone calls] to those people who shared negative feedback. For the most part the conversations ended in a very positive light.”

Timeline: *ongoing*

Managing persistent name misuse in the local press

Allow for a longer resolution time- even ongoing

“Because we didn’t take the formal steps to legally change the name or do a formal DBA, the press still refers to us as River Oaks Chamber Orchestra. We’ll ask them to correct the name if it’s online, not physically printed.”

Timeline: *ongoing*

“Even after the reveal of the brand there are still many folks in the community, including the media, who will use Stages Repertory Theatre ... we call them and say, ‘We’re so excited about this coverage, but wanted to reinforce that the name is just Stages.’”

Timeline: *Undisclosed*

From our conversations, it seems that name adoption is an ongoing challenge that can persist months and even years after the effective name change.

Section Outline



5

Cost, Timelines, and Impact

Understanding how much time, resource, and funds will need to be allocated to a name change is crucial when getting started — as is planning for the types of opportunities for impact the rebrand can have. In this section, we cover some of those costs and impacts, including:

- Typical cost and timeline for an organizational name change
- Types of programming and content changes paired with a name change
- Resulting opportunities for a stronger case for funding support
- Opportunities to assess overall organizational health through data collection

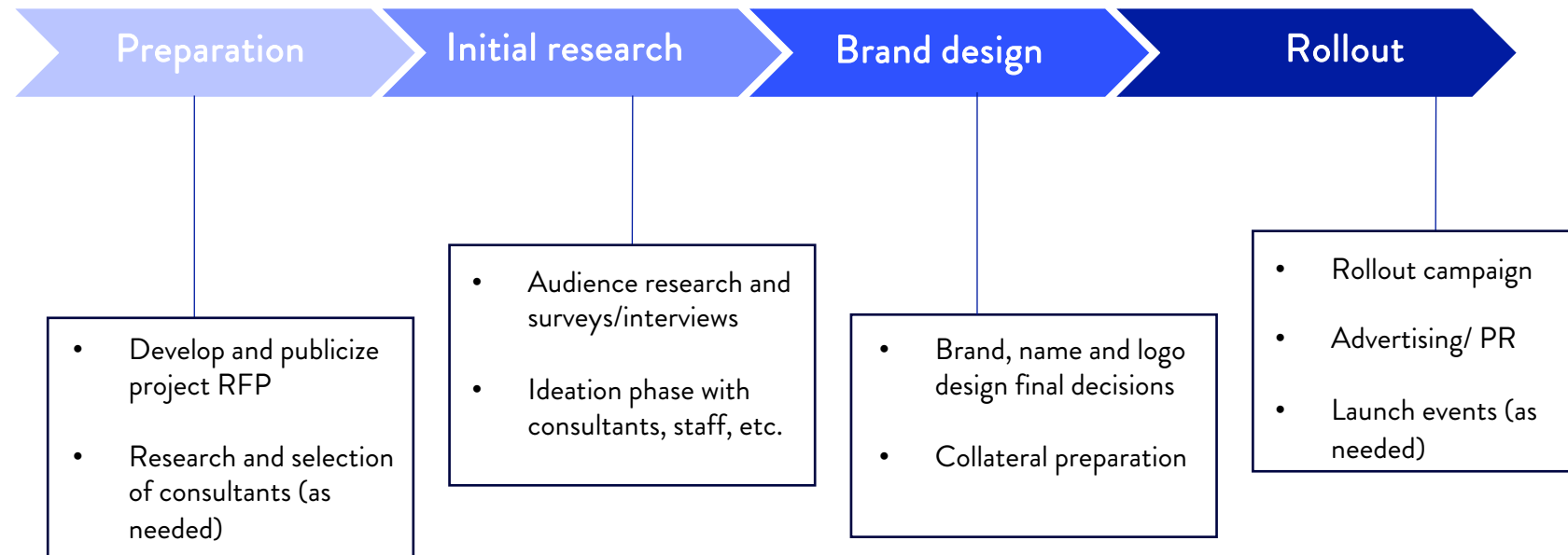
Average Budget For Name Change Around \$200,000

Organization	Approximate Total Cost	What budgets covered
Washington Performing Arts	\$85,000	Consultant fees, surveys, new season brochure design, and increased overall marketing budget
Plimoth Patuxet Museums	\$120,000	Initial brand launch costs included updating the website, updating signs on all museum buildings and grounds, updating external signs, the Museum's stationery, business cards, retail packaging, retail products, staff apparel, and marketing collateral.
Orchestra Lumos	\$225,000	\$100K for the rebrand work and an additional one-off marketing spend of \$125K to launch the new brand and raise awareness
Stages	\$150,000	Consultant expenses, collateral for new visuals , website, and contact information
Orchestra Sinfonica di Milano	€120,000-€150,000	Initial research, generation of new logo and brand, and complete advertising campaign
Performing Arts Houston	\$220,000	Rebranding ideation (\$85K), implementation and rollout (\$135K)
Global Arts Live	\$300,000	Consultant fees (\$100K), PR (\$30K), business expenses (\$10K), digital campaign (\$30K), OOH campaign & other media (\$100K), website updates (\$10K), marketing materials& swag (\$10K), direct mail (\$10K)
Boston Symphony Orchestra	\$450,000	Full rebranding process to date, including hiring of market research and creative firms
Segerstrom Center for the Arts	<i>Total cost not provided</i>	Launch event, legal components for name change, recreating collateral with new logo
ROCO	No formal budget allocated – part of marketing expenses	<i>N/A</i>
La Jolla Music Society	<i>N/A</i>	<i>N/A</i>

Average Project Timelines Hover Around 22 Months

Organization	Approximate Timeline
Segerstrom Center for the Arts	9 months
Stages	12 months
Washington Performing Arts	13 months
Orchestra Lumos	18 months
Performing Arts Houston	18 months
Global Arts Live	2 years
Orchestra Sinfonica di Milano	2.5 years
Boston Symphony Orchestra	About 3 years
Plimoth Patuxet Museums	About 3 years
ROCO	Informal process/ no set time
La Jolla Music Society	N/A

Standard components of rebrand timelines



“Consider your timeline - if you want to roll out something new at the same time as the opening of a new building or similar, really plan ahead. Work back from that as a launch date. We didn’t do that, we let it flow rather organically, which for a project of this scope I think I would do differently now.”

Most Rebrands Are Paired with Program Expansion Rather than Content Change

Across our interviews, there was a more nuanced picture regarding the impact of the name and brand change on audiences and programming. Some organizations made no significant changes to their programming alongside the brand change, while others did feel it was a moment to revisit some of their work and expand their footprints — mainly within their local communities.

New programs to focus on the community



Refreshed programs and leaning into community efforts

Prior to the rebrand process, WPA had done a strategic plan to outline a more inclusive future, including increased community commitments. WPA therefore aligned the new name to their inclusive aspirations and goals that were on the horizon.



Expanded efforts and revised ways of describing their events

Similarly, Orchestra Lumos expanded their programs across their local county. They also matched the rebrand with more Pops events and a more inclusive way of describing their concerts, removing specific jargon like “repertoire.”

Increasing and diversifying artistic content



Rebrand and new building allowing for expanded programmatic offer and cadence

At Segerstrom Center for the Arts, their new building connected to the rebrand freed up significant space for new performances and programs, such as one-night-only tours of big headliners. They also built a new black box theater for small, cabaret-style events.



New name and brand supported more exploratory forms of storytelling

At Stages, their new program “Stages Studio Sessions,” was partly the result of their rebrand. Had they maintained their more traditional repertory identity, they might not have pursued this more intimate form of stage storytelling.

Rebranding Supports Awareness, Fundraising, and Future Directions

The clearest impact areas of the renaming efforts of our research participants were the long-term strategic changes they embodied and the new fundraising opportunities they opened up.



Increased connection to the city leads to more support and international appeal

At the Orchestra Sinfonica di Milano, their **new name that directly connects with the city of Milan helped push the organization to a more global stage.** The name also matched other similarly-sized, city-based orchestras, elevating their work.

As a result of this elevation and the connection with their prestigious home city of Milan, the **orchestra was able to start new collaborations with organizations and private companies.**



Revised terms helps align to corporate values and improve national visibility

For Plimoth Patuxet Museums, the inclusion of the Indigenous name for the land that was also Plymouth Colony helped to **clarify their institutional brand, as well as their mission and core activities.**

The name change has resulted in **more positive brand engagements, including those with other museum professionals, corporate sponsors, and key audiences.** In the area of corporate partnerships, the new name has led to brand clarity and perceived alignment of values.



Rebrand and new leadership herald change in long-term vision

For Orchestra Lumos, the decision to remove the direct association to the city of Stamford embodies the **orchestra's current programs beyond the city and its desire to continue expanding its efforts across their county.**

The rebrand, paired with the new artistic leader and increased attention to the community, all **supported increased awareness as well as increased funding from investors committed to seeing more involvement with the wider community.**

While Direct Data Is Hard to Parse, Adjacent Metrics Can Be Revealing

While organizations have limited current data that supports a direct connection between the rebrand and new audiences, there are opportunities to track other important metrics as a result of the overall impact of the rebrand — in ways that can support the growth and health of the organization overall.



Performing Arts Houston's rebrand, paired with a new business model, allows for some concrete metrics tracking

- Performing Arts Houston paired their rebrand with a revision of their business model with a membership-based audience loyalty program.
- While it is hard to determine the direct impact of the rebrand, they have concrete data around the impact of their new membership program.
- Since the launch of their new membership program their loyalty households are now up by 254% compared to pre-pandemic and still going strong.
- Since the rebrand, their average capacity sold has increased 30% over pre-pandemic seasons. Currently averaging 80%, up from a previous average of 50%.

Overall Metrics to Track Institutional Health and Brand Awareness

- ✓ Brand tracking
 - Unaided/aided awareness
 - Loyalty, advocacy, engagement
- ✓ Website traffic
- ✓ Social media traffic
- ✓ Ticket and subscription sales
- ✓ New to file buyers
- ✓ Earned media press



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ABA Resources

Embarking on a rebrand? ABA can help! Our members have access to the following tools that can support at all stages of a rebrand or renaming initiative.



Finding Your Shared Purpose
Interactive Member Workshop Series

Shared Purpose Workshop Series

ABA's Shared Purpose Workshop Series is a resource for members that guides a working group from your organization through a set of facilitated sessions to unearth the higher order values that connect you with your constituents.

The outputs of this series allow for organizations to explore and align their overall brand purpose and identity in contexts including marketing, development, community engagement, and internal communications.



Season Ticket Holder Survey Results
Report | February 2023

Audience & Donor Surveys

ABA offers a full suite of custom survey design and analysis to help you uncover key insights into your organization's stakeholders. Our surveys are designed with your specific goals in mind and can be applied to a variety of stakeholder groups.

Surveying key constituents about potential name and brand identity options is a crucial step in a rebrand process. ABA can facilitate the collection of this vital information through our survey design/deployment expertise and tools.

APPENDIX

Research Participant Budget Information

Organization	Formerly Known As	Location	990 Year	Operating Budget	Total Revenue
Boston Symphony Orchestra	N/A	Boston, MA, USA	09.01.21- 08.31.22	\$98,574,259	\$116,038,188
Global Arts Live	World Music/CRASHarts	Boston, MA, USA	07.01.2021- 06.30.2022	\$1,866,284	\$2,657,568
La Jolla Music Society	N/A	La Jolla, CA, USA	10.01.2020-09.30.2021	\$6,006,462	\$5,224,613
Orchestra Lumos	Stamford Symphony	Stamford, CT, USA	07.01.2021- 06.30.2022	\$1,954,389	\$2,087,618
Orchestra Sinfonica di Milano*	L'Orchestra Verdi (LaVerdi)	Milan, Italy	01.01.2022-12.31.2022*	<i>unspecified</i>	€9,899,777
Performing Arts Houston	Society for the Performing Arts	Houston, TX, USA	07.01.2021- 06.30.2022	\$2,202,663	\$6,467,356
Plimoth Patuxet Museums	Plimoth Plantation	Plymouth, MA, USA	01.01.2022-12.31.2022	\$10,831,230	\$13,744,663
ROCO	River Oaks Chamber Orchestra	Houston, TX, USA	07.01.2021- 06.30.2022	\$1,478,506	\$7,819,938
Segerstrom Center for the Arts	Orange County Performing Arts Center	Costa Mesa, CA, USA	07.01.2021- 06.30.2022	\$62,344,120	\$84,488,930
Stages	Stages Repertory Theatre	Houston, TX, USA	07.01.2021- 06.30.2022	\$5,725,351	\$5,949,704
Washington Performing Arts	Washington Performing Arts Society	Washington, DC, USA	09.01.21- 08.31.22	\$5,512,771	\$7,819,938

* For the Orchestra Sinfonica di Milano, we referred to their publicly available [financial statements](#).

Cost, Timeline and Leadership Involvement

Organization	Approximate Total Cost	Approximate Timeline	Ownership of Rebranding Process
Boston Symphony Orchestra	\$450,000	37 months	VP of Marketing, Sales & Comms, Director of Marketing and Audience Dev and Director of Creative/Digital. CEO also part of process, and HR Director for EDI approach.
Global Arts Live	\$300,000	12 months	Director of Marketing, Marketing Manager and a Board Member had direct rapport with consultants. Founder was also involved once work with consultants was well underway.
La Jolla Music Society	N/A	N/A	N/A
Orchestra Lumos	\$225,000	18 months	President & CEO led project with brand agency.
Orchestra Sinfonica di Milano	€120,000-€150,000	2.5 years	Director of Business Development and Artistic Area (i.e. Marketing) led the project with the General Manager. Later brought in the Chairwoman of the board for approval.
Performing Arts Houston	\$220,000	18 months	CEO, CFO, and Director of Marketing. CEO led more strategic side, Marketing more tactical components.
Plimoth Patuxet Museums	\$120,000	About 3 years	Executive Director, Director of Marketing, Deputy ED, graphic designer, PR Manager, Head of Programs and Head of Indigenous Programs.
ROCO	No formal budget allocated – part of marketing expenses	Informal process/ no set time	Informal process- Founder & Artistic Director, Managing Director and Director of Marketing and Communications.
Segerstrom Center for the Arts	<i>Total cost not provided</i>	9 months	VP, Marketing and Communications. Project was mainly Marketing and PR led.
Stages	\$150,000	12 months	Task force including 3 members of the board, Managing Director, Artistic Director, Marketing Director and Development Director.
Washington Performing Arts	\$85,000	13 months	President & CEO led the initiative and worked closely with selected consultants and board members.