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Transforming Arts Organizations Worldwide

Individual Arts Donor Survey – Region Report

Quantitative Survey Analysis
July 2021

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I. Study Approach & Respondent Profile

Our Quantitative Approach

Survey Methodology

The Advisory Board for the Arts conducted a survey of 5154 individual donors to the arts January 27 to March 15, 2021. The online questionnaire was distributed via emailed links by 47 arts organizations across genres and regions. Participating arts organizations invited donors to take part who had given at least 250 in local currency in at least one of the past three years. Most participating organizations did not include governing board members or their top 1% of donors. To qualify, survey respondents had to acknowledge playing a role in their household's donation decisions and recall donating to the arts organization in the past 3 years. All local data privacy and consumer protection laws were followed in survey distribution, data collection, and data storage.

The 58-question donor survey was intended to give arts organizations an unparalleled understanding of giving from the perspective of donors themselves. Respondents were asked questions about the specific arts organization which invited them to take the survey as well as about their overall charitable giving.

Donations to Arts Org

- Activity/Attendance patterns
- Amount and type of donation
- Motivations for giving
- Connection to the arts org
- Donation confidence
- Obstacles to donating
- Relationship to arts org
- Priority of donation
- Recommendation power
- Reasons for change in donation
- Impact of benefits on giving

Overall Charitable Giving

- Other NFP org types donated to
- Priority of arts & culture orgs in donations
- Consistency of orgs donated to
- Top reasons for donating
- Time spent planning and thought behind giving
- Anticipatory donations in future
- Confidence in giving to right causes
- Satisfaction with giving amount
- Reasons for increasing donations to a NFP org

Personal Values & Demographics

- Fairness
- Compassion
- Respect
- Making a difference
- Balance
- Gender
- Ethnicity
- Presence of children
- Employment status
- Income & assets

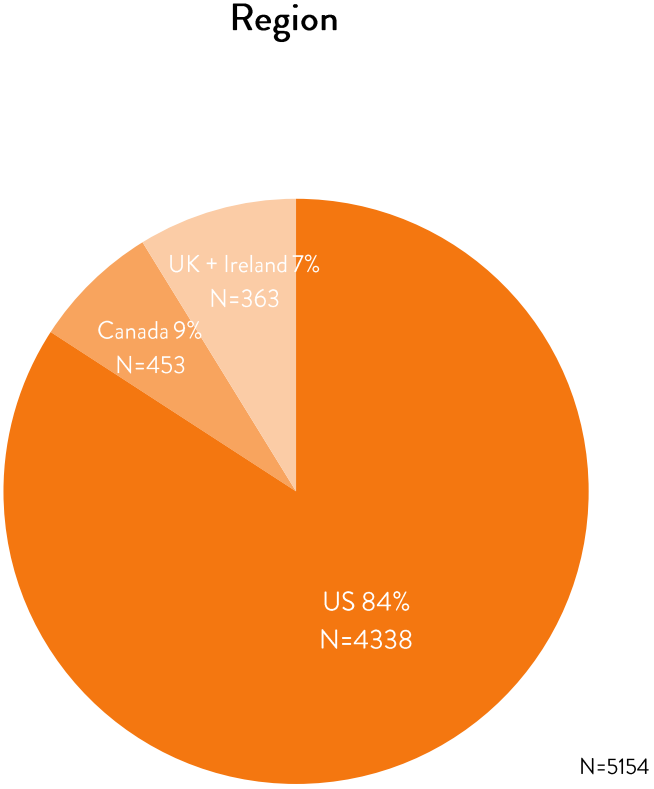
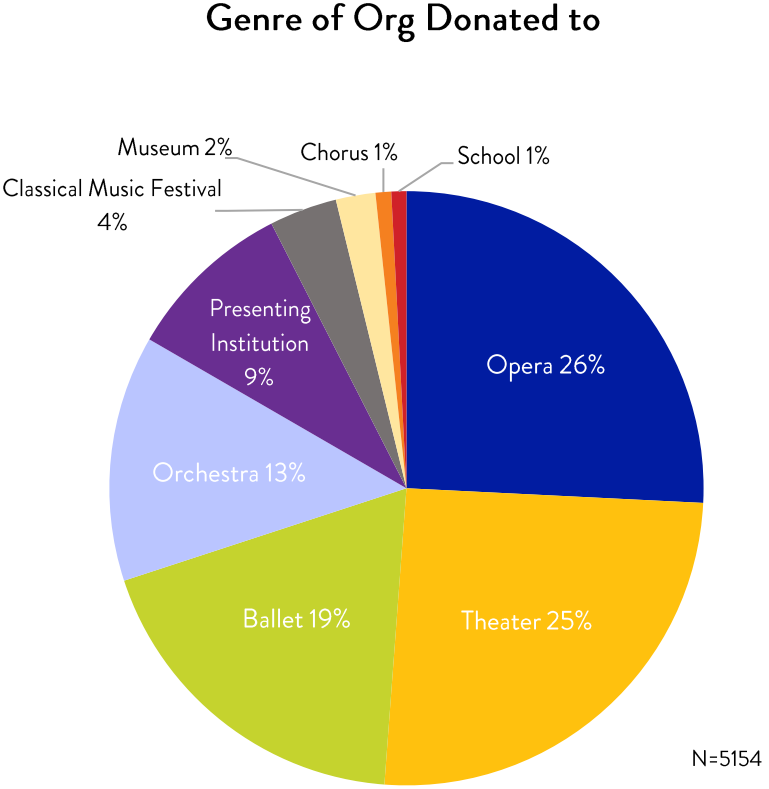
This report specifically looks at cuts of the data by region:

- **United States**
- **Canada**
- **United Kingdom + Ireland**

It is important to note the relatively small sample size of donors from Canada and the UK + Ireland. Please draw conclusions about those results with care.

*All study outputs, including recaps and replays of the Summit and the overall report are available to ABA members [here](#)

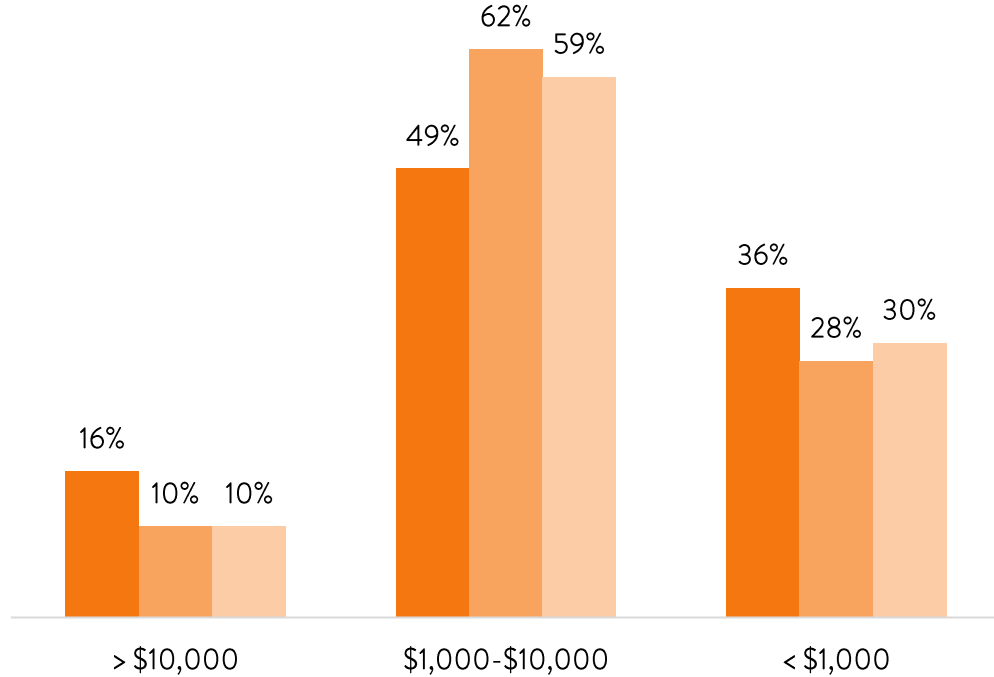
Overall Respondent Genre and Region Distributions



Average Three-Year Giving by Region

Distribution by Average Giving, by Region
Cumulative Amount in US Dollar Equivalent, 2018-2020

■ US (N=4116) ■ Canada (N=446) ■ UK + Ireland (N=350)



Average Donation Amounts, by Region
Cumulative Amount in US Dollar Equivalent, 2018-2020

	Average Annual Giving	+	Average Other Giving	=	Average Total Giving
US (N=4116)	\$5,401		\$2,771		\$8,171
Canada (N=446)	\$3,654		\$1,246		\$4,900
UK + Ireland (N=350)	\$3,900		\$1,599		\$5,500

Survey participants reported their giving in local currency by year and type for 2018, 2019, and 2020; Survey participants who did not report their 2018-2020 donation amounts were filtered out.

II. Arts Donor Motivations

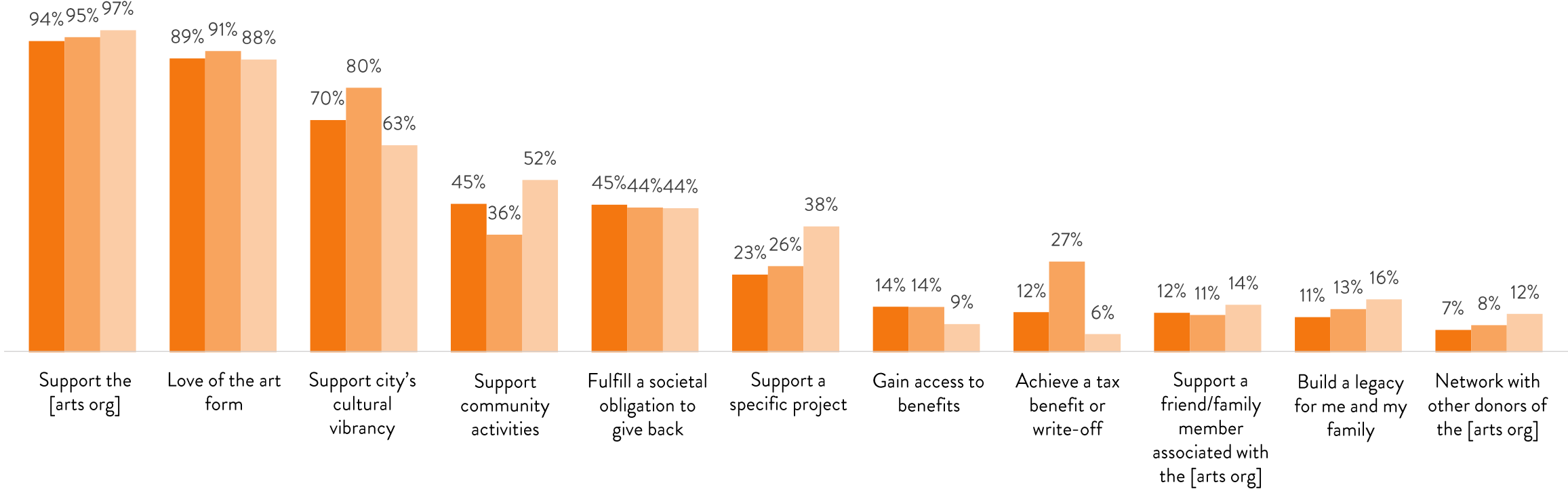
Nearly all individual arts donors say they donate to show their support for the arts organization and for love of the art form itself, among other reasons. However, a cluster analysis shows that there are three distinct donor motivational segments: Benefits Donors, Arts Lover Donors, and Community Donors.

- In the United States, Arts Lovers comprise a slightly larger proportion of donors than the other two segments.
- In Canada, donors are evenly split across all three segments.
- In the UK + Ireland, Community Donors are the largest group.

Why Donors Say They Give to the Arts

Giving Reason Importance in Donation Decision
(Top 2 Choices, Very Important + Important)

US (N=4338) Canada (N=453) UK + Ireland (N=363)

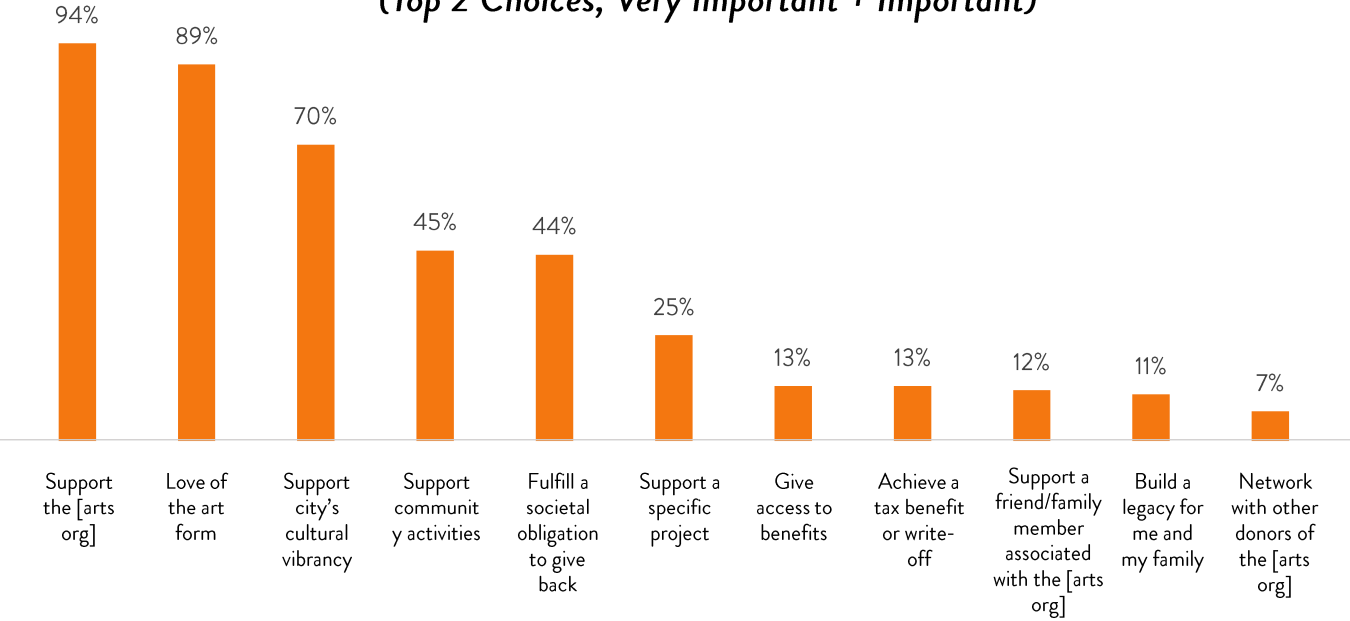


“People donate money for many reasons. For each of the following, please indicate how important that reason was in your decision to donate to [PIPE IN ARTS ORG] in the last three years.”
Throughout this report, [PIPE IN ARTS ORG] and [arts org] indicate when the name of the arts organization was inserted into the survey.

What Donors Say and How We Untangle What's Important

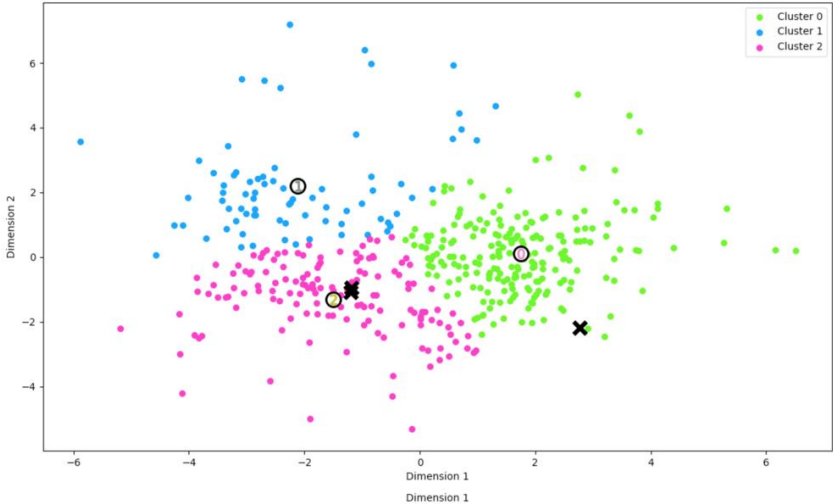
Our survey asked donors to rate the importance of 11 motivations for donating to their arts organization. Nearly all donors say that supporting the arts organization and love of the arts is important. In order to learn more from these ratings, ABA ran a cluster analysis to find patterns across all the responses. Our analysis discovered that all arts donors fall into one of 3 distinct donor motivation clusters (shown on the next slide).

Giving Reason Importance in Donation Decision, Overall Data
(Top 2 Choices, Very Important + Important)



N=5154

Cluster Analysis Finds Hidden Patterns Across All Survey Respondent Answers



All Donors Fall into One of Three Motivational Segments



Benefits-Driven

Primary Motivations:

- Access to benefits
- Access to network of donors
- Tax write-off



Arts Lovers

Primary Motivations:

- Love of the art
- Support a specific arts organization
- Support cultural vibrancy



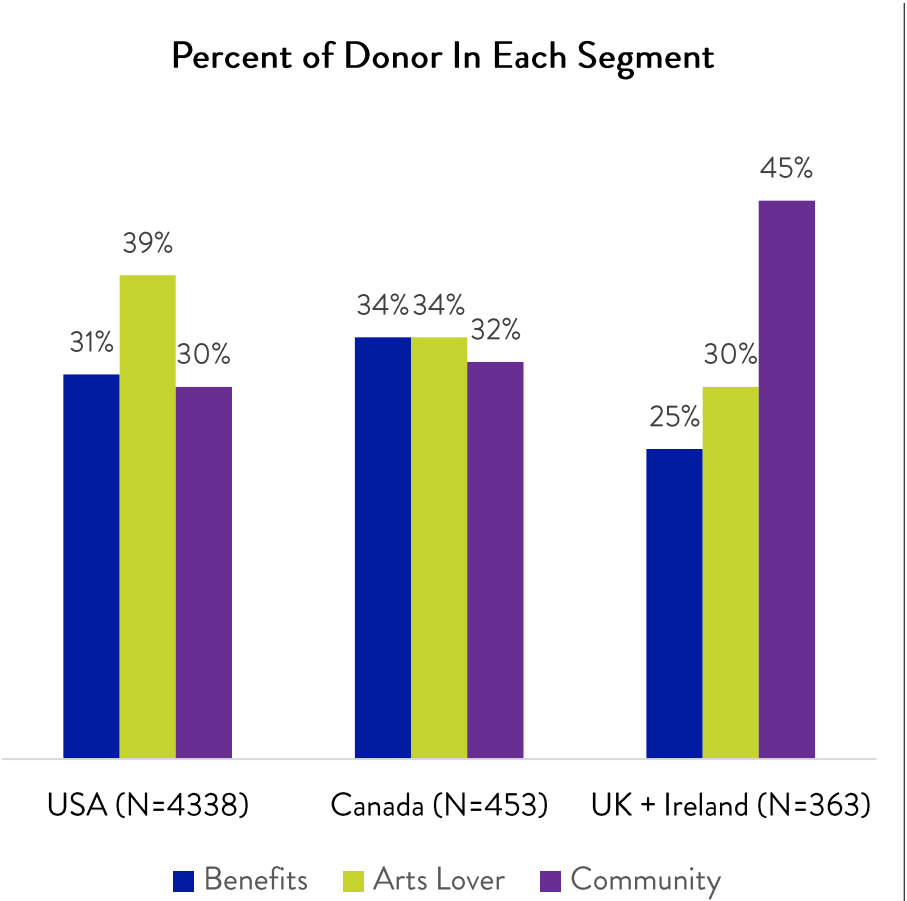
Community Donors

Primary Motivations:

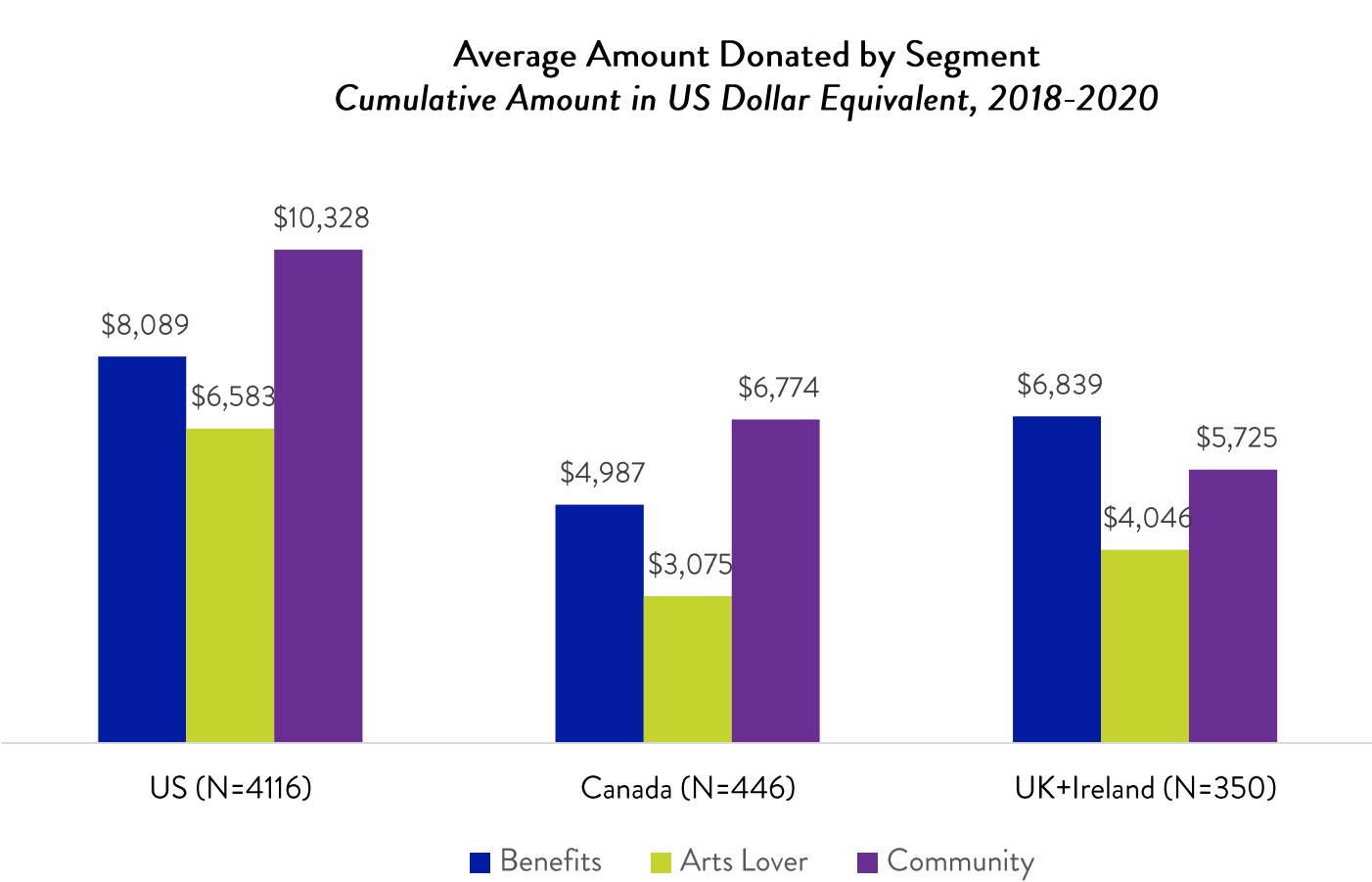
- Support projects
- Support community activities
- Support friends and family
- Build or continue a legacy
- Access network of donors

Distribution of Motivational Segments and Giving Amounts

Percent of Donor In Each Segment



Average Amount Donated by Segment
Cumulative Amount in US Dollar Equivalent, 2018-2020



Survey participants reported their giving in local currency by year and type for 2018, 2019, and 2020; Survey participants who did not report their 2018-2020 donation amounts were filtered out.

III. Arts Organization Connections

Arts donors are extremely involved with their arts organizations and attending performances and exhibits is just one aspect of their connection. Community impact, shared values, emotional connection, and personal relationships with staff are also critical.

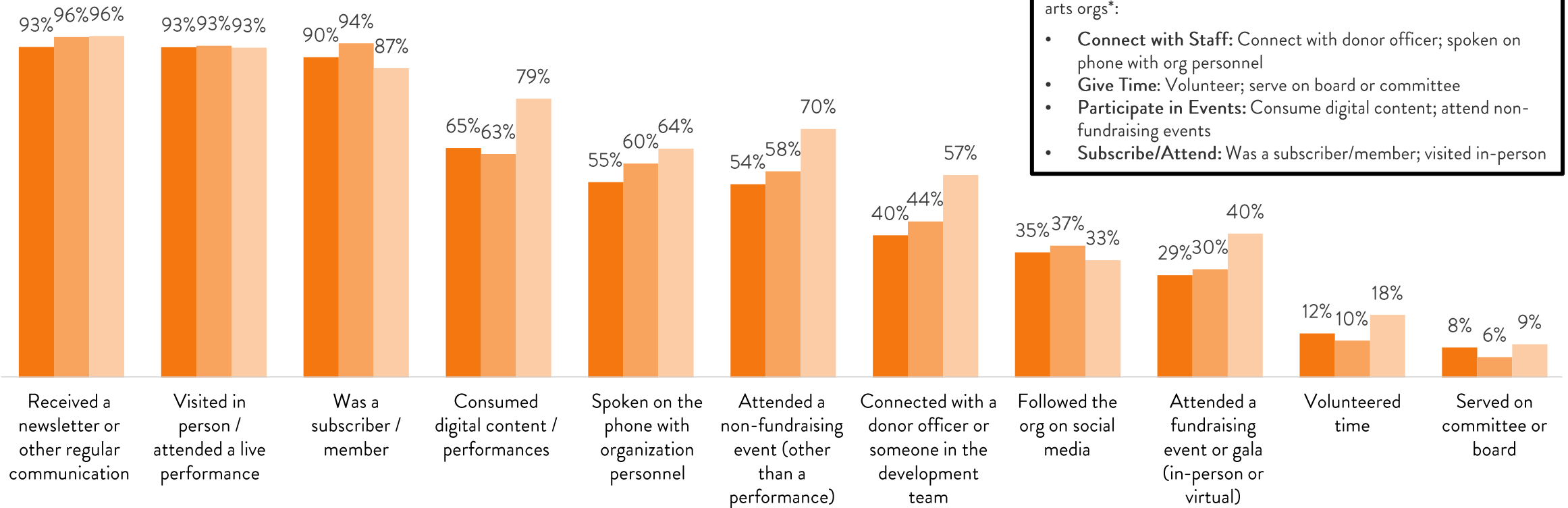
Arts donors are generally very confident that they are giving the “right amount” to their arts organization, but are a bit less sure about the impact of their gift and the way it is used. Perhaps as a result, their likelihood to recommend that others donate is relatively low.

- There are not a lot of significant differences between donors in different regions in these questions. UK + Ireland donors do stand out as even more strongly connected and attached to their arts organization than their U.S. and Canadian peers.

Donors Are Very Involved with Arts Orgs

Donor Involvement With Arts Org in the Past 3 Years

■ US (N=4338) ■ Canada (N=453) ■ UK + Ireland (N=363)



A cluster analysis showed **4 primary ways** that donors interact with arts orgs*:

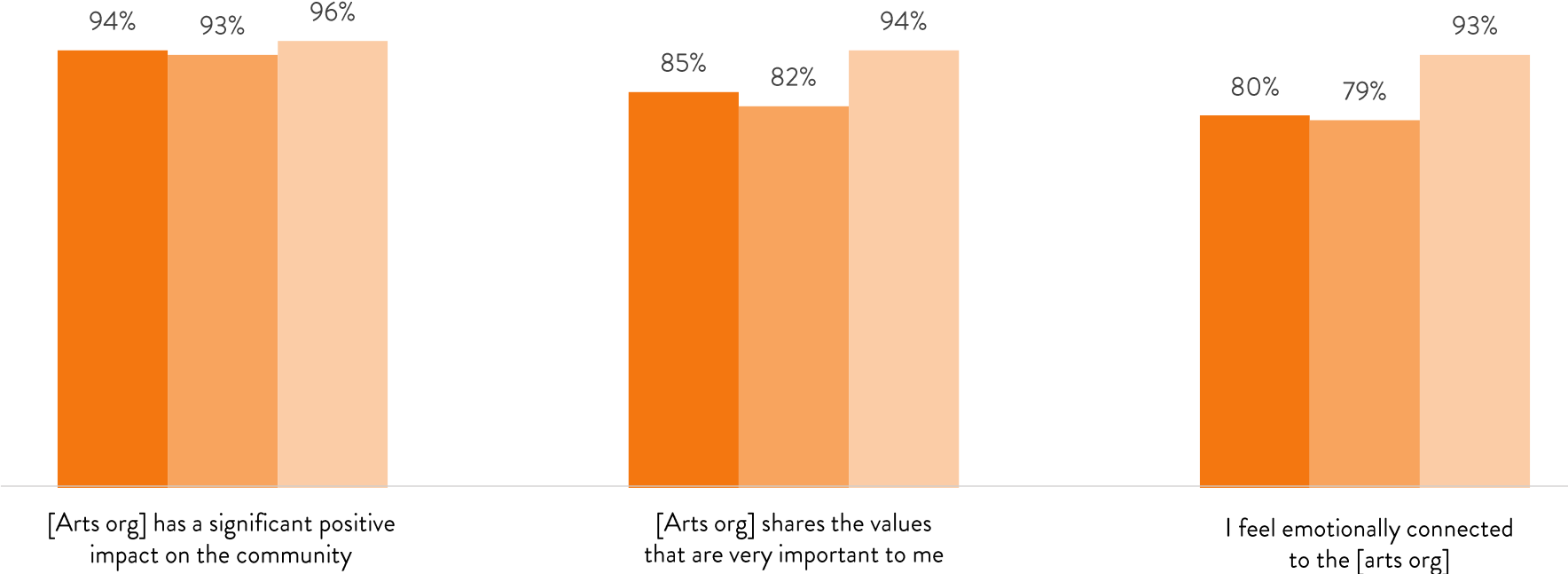
- **Connect with Staff:** Connect with donor officer; spoken on phone with org personnel
- **Give Time:** Volunteer; serve on board or committee
- **Participate in Events:** Consume digital content; attend non-fundraising events
- **Subscribe/Attend:** Was a subscriber/member; visited in-person

*Cluster analysis was performed using the overall data
 "In the past three years, have you done any of the following with [PIPE IN ARTS ORG]? Please select all that apply."

Donors Care About More Than Art

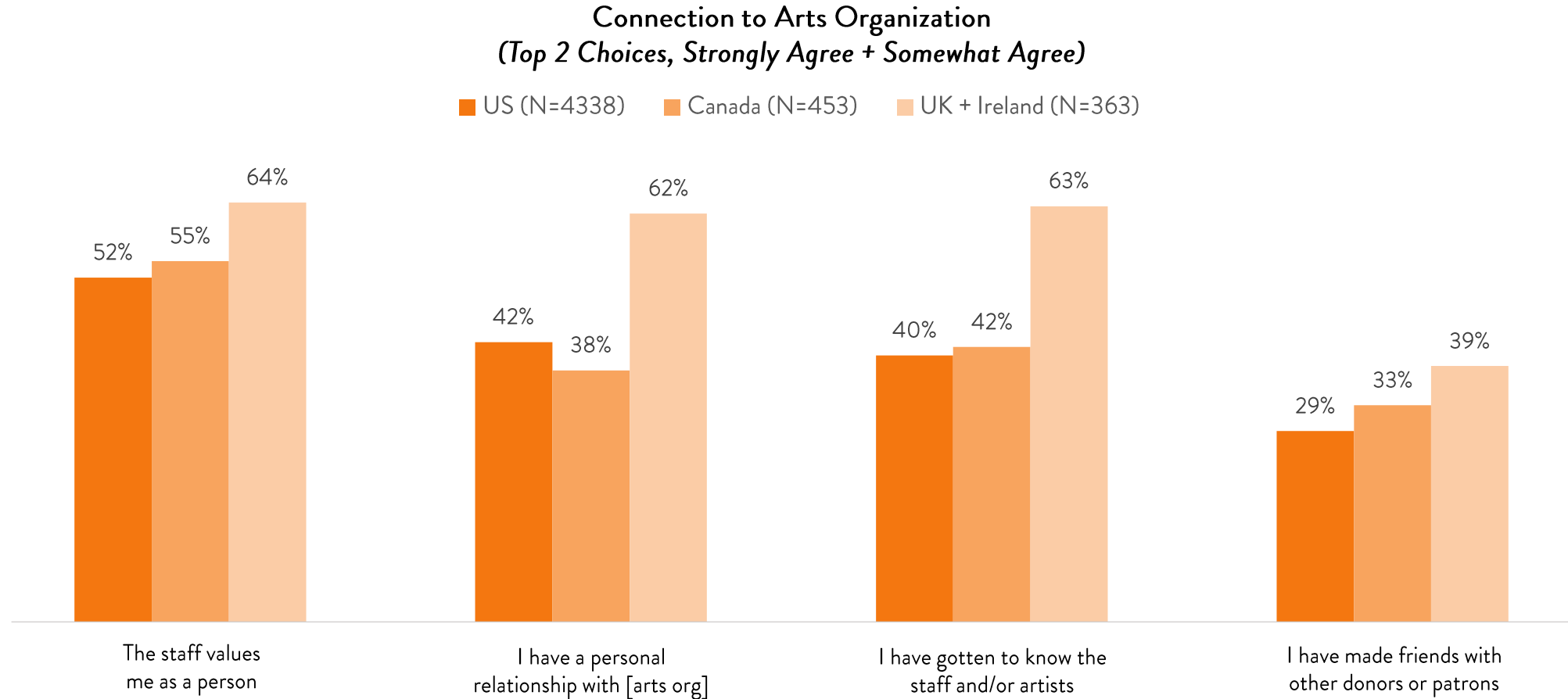
Beliefs About Arts Organization (Top 2 Choices, Strongly Agree + Somewhat Agree)

■ US (N=4338) ■ Canada (N=453) ■ UK + Ireland (N=363)



"Below are a number of statements [PIPE IN ARTS ORG]. Please indicate if you agree or disagree with each one."

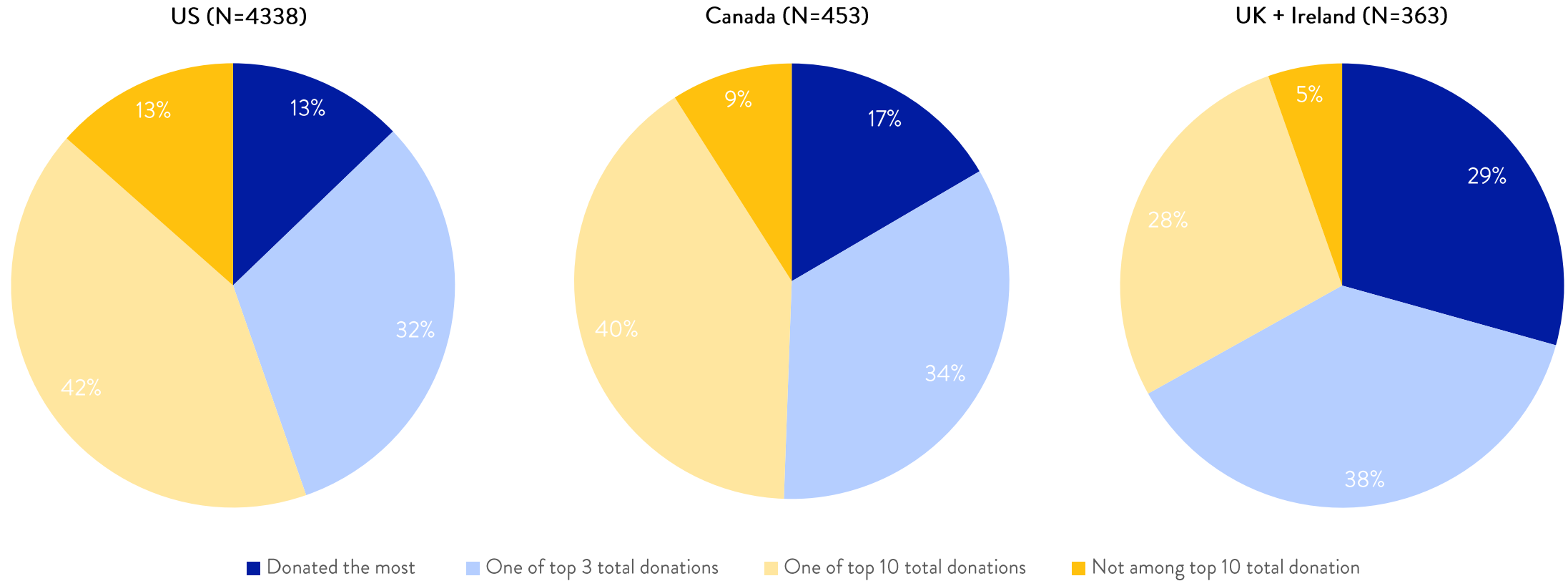
Opportunity to Grow Personal Connection with Arts Donors



“Below are a number of statements about your connection with [PIPE IN ARTS ORG]. Please indicate if you agree or disagree with each one.”

Arts Organizations Often Among Donor's Top 3 Gifts

Ranking of Donation Amount to Arts Org in Relation to Total Giving



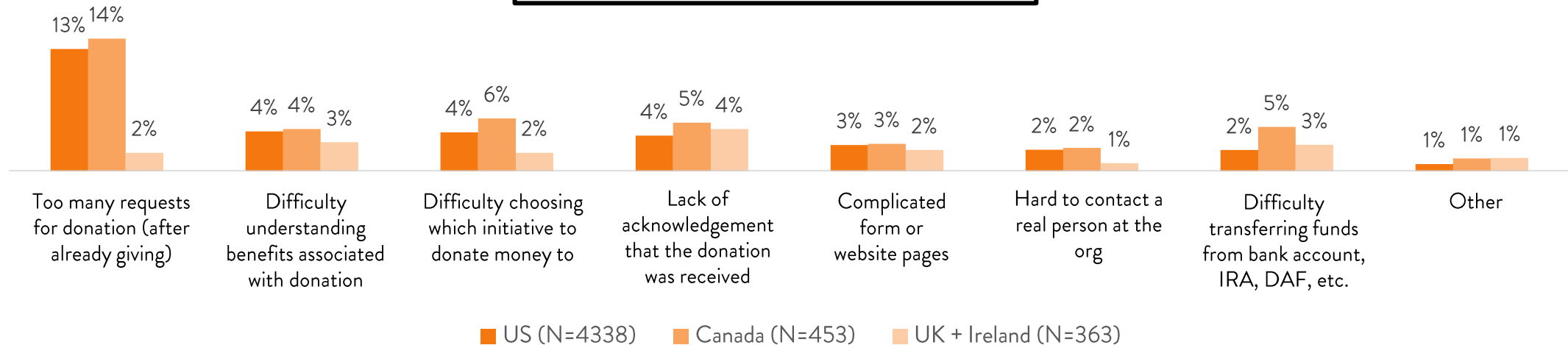
"How would you characterize the total amount you've given to [PIPE IN ARTS ORG] over the past three years in the context of your overall charitable or non-profit giving over the same time period?"

Not a Lot of Obstacles Faced in Donating

Challenges Encountered Donating to the Arts Org

Donors Facing No Obstacles

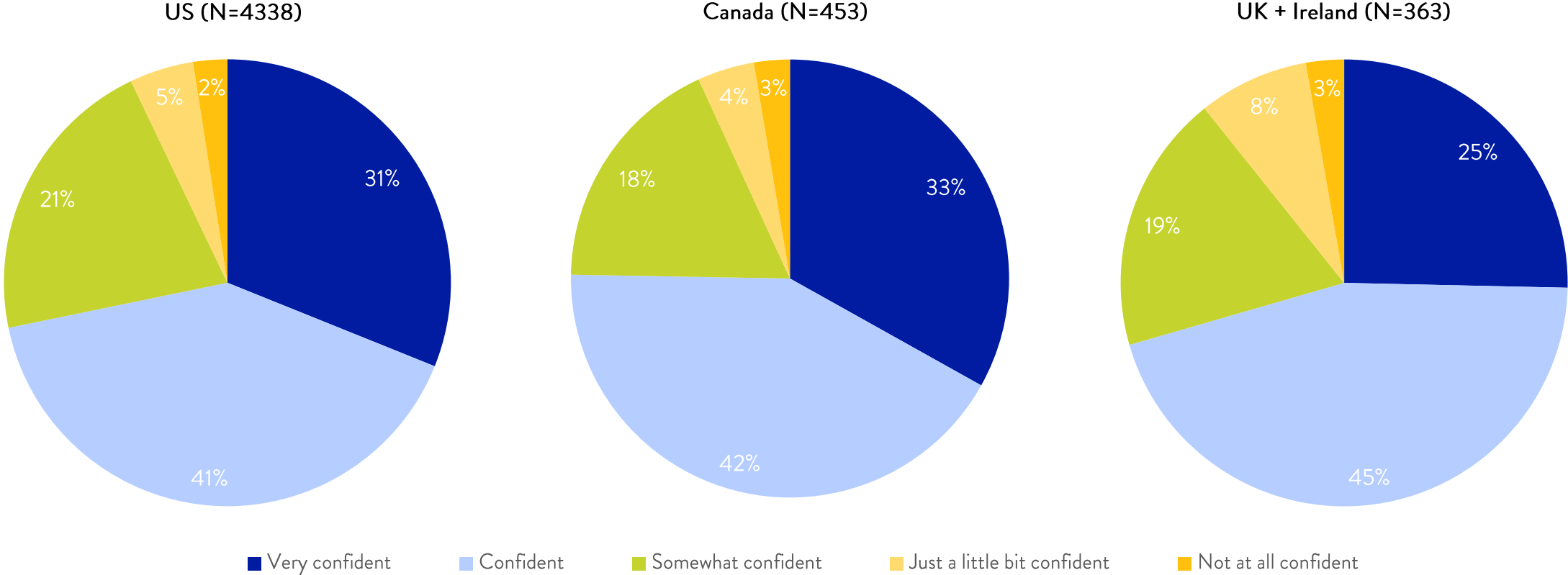
US	76%
Canada	72%
UK + Ireland	87%



"Have you encountered any of the following challenges or obstacles in donating to [PIPE IN ARTS ORG]? Please select all that apply."

Donors Are Confident in “Right Amount”

Confidence in Giving the “Right Amount” to Arts Organization

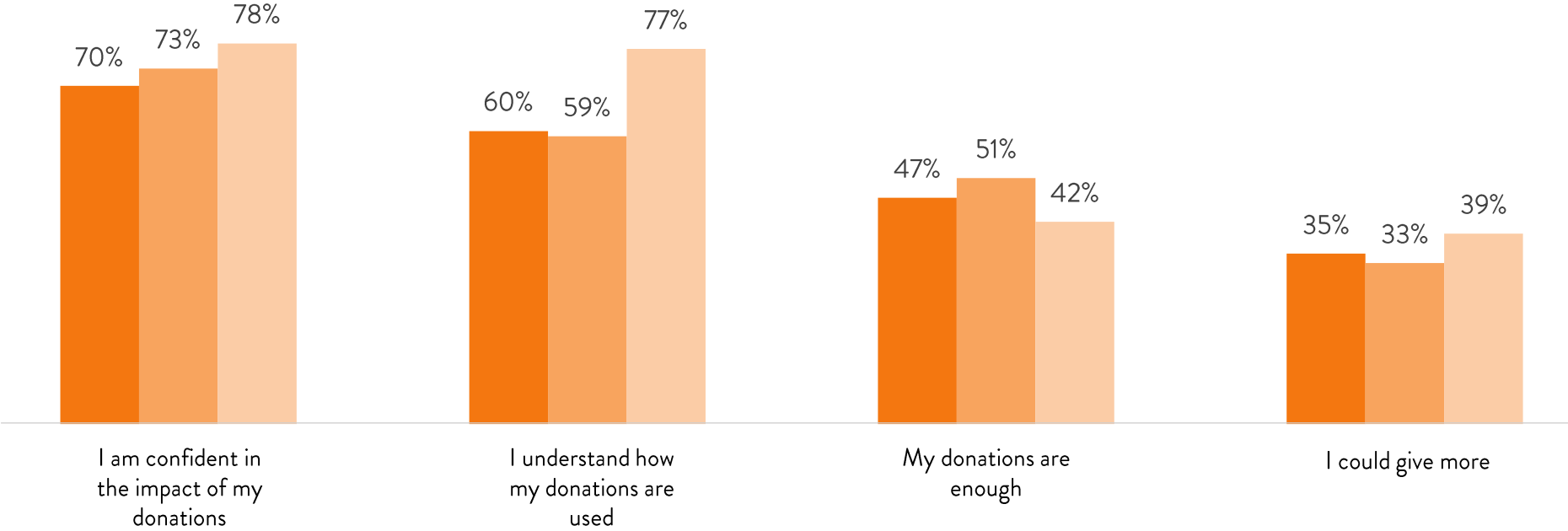


“How confident are you that you are giving the right amount to [PIPE IN ARTS ORG]. By “the right amount” we mean both an amount that matches your financial ability and an amount you feel makes a positive impact on the organization.”

Opportunity to Help Donors Understand How Gifts Are Used

Feelings About Donations to Arts Org
(Top 2 Choices, Strongly Agree + Somewhat Agree)

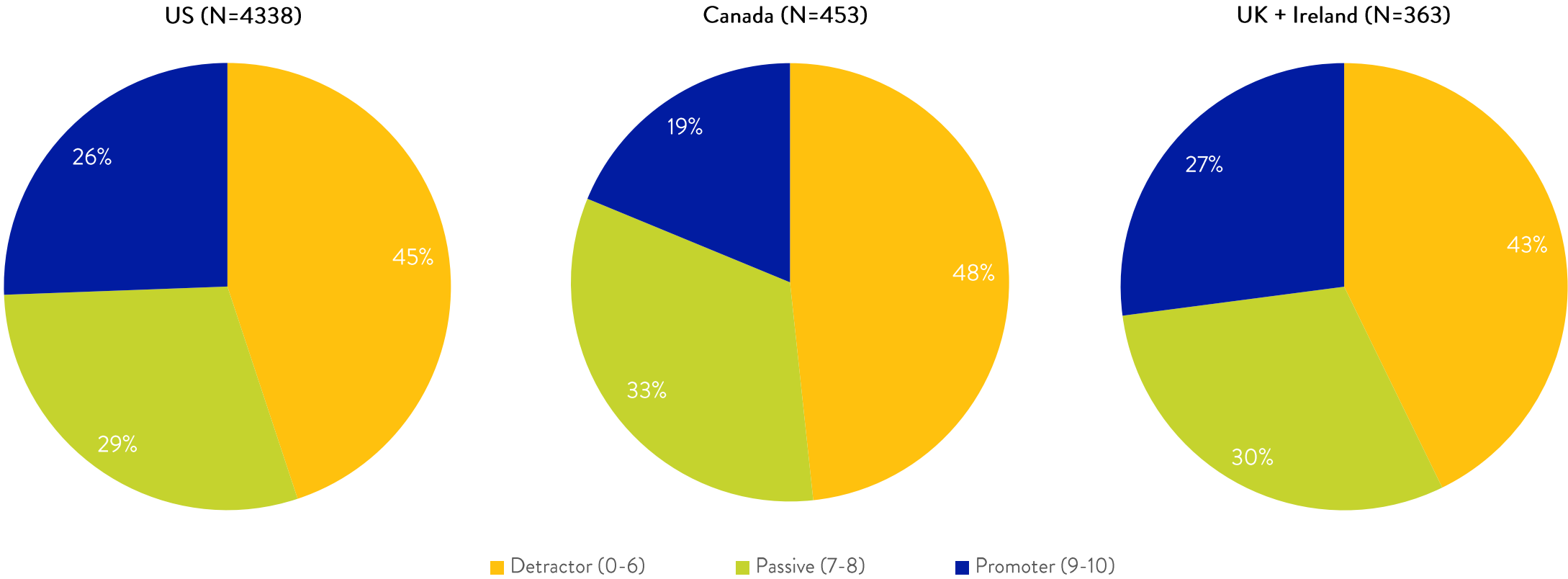
US (N=4338) Canada (N=453) UK + Ireland (N=363)



“Below are a number of statements about your donation(s) over the last three years to [PIPE IN ARTS ORG]. Please indicate if you agree or disagree with each one.”

Room to Grow More Donors Into Advocates

Likelihood to Recommend Family and Friends to Donate to Arts Org



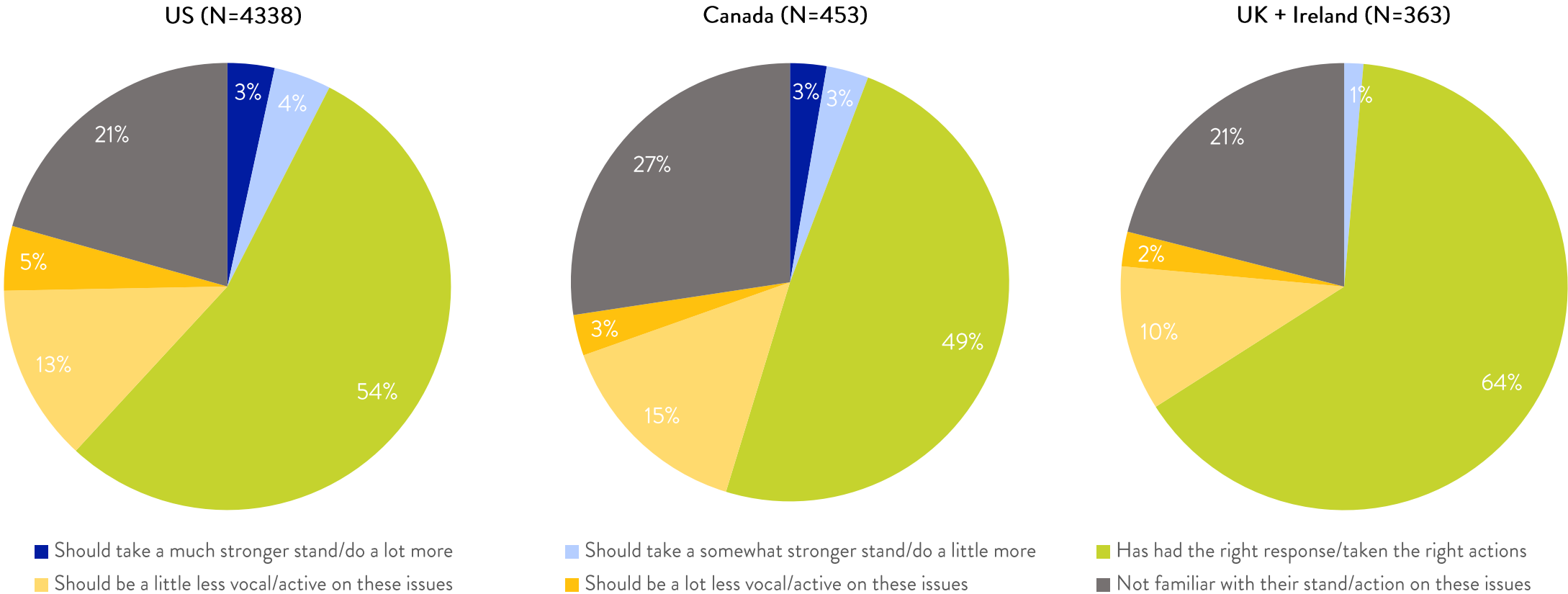
Scale groupings based on traditional Net Promoter Score categories: 0-6: “Detractor,” 7-8: “Passive,” 9-10: “Promoter”
“On a scale of 0 to 10, how likely are you to recommend that your friends and family donate to [PIPE IN ARTS ORGANIZATION]?”

IV. Reactions to Arts Organization DEI&A Stance

Arts donors across all regions are generally satisfied with their organization's stance and actions related to issues of diversity, equity, inclusion, and accessibility (DEI&A).

Most Donors Satisfied with Orgs' DEI&A Stance

Arts Org Response to DEI&A and Social Justice Issues



"As you may have seen or heard, issues related to **diversity, equity, inclusion, and social justice** are frequently in the news these days. Which of the following best describes your feeling on how [PIPE IN ARTS ORG] has responded to or dealt with these issues?"

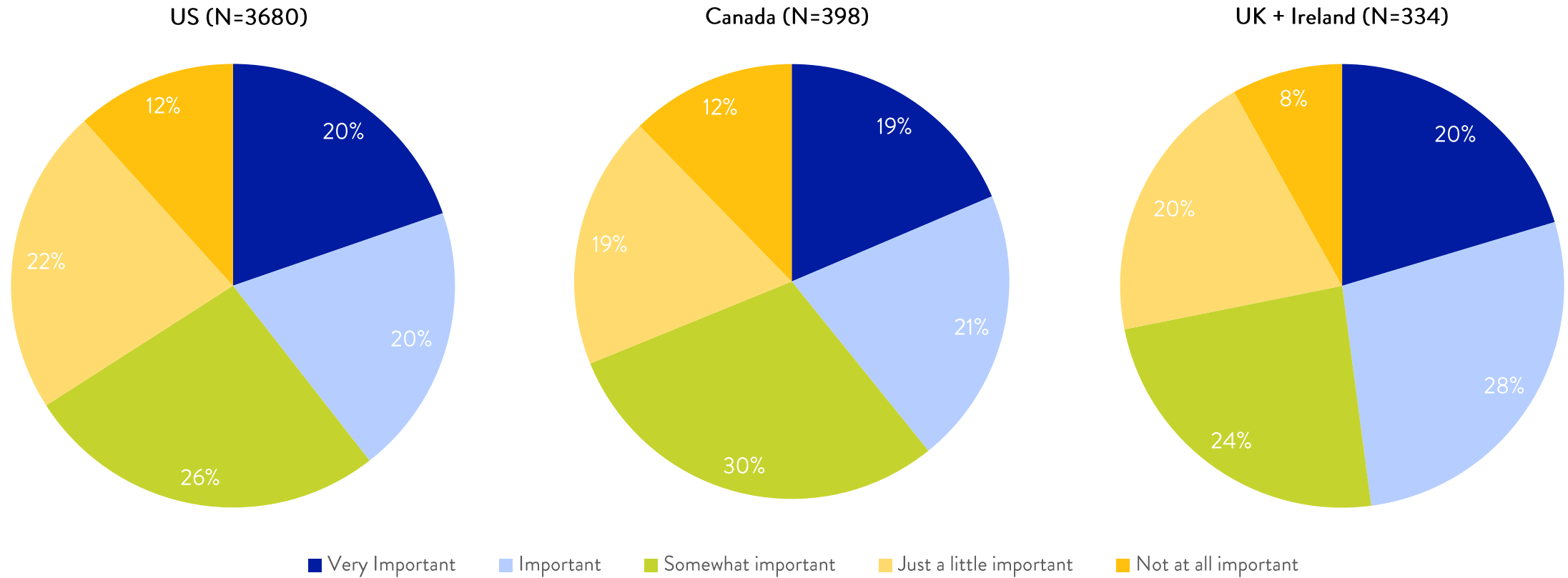
V. The Impact of Benefits

Most donors acknowledge that receiving benefits is at least “somewhat” important to their decision to give. Still, most are not enticed to give more to gain access to the next level up. Donors also claim they would not significantly (if at all) reduce their giving should benefits be changed or reduced (especially as a result of COVID-19).

- U.S. donors value the ability to change their tickets above all else.
- Canadian donors strongly value the ability to change tickets along with access to a special lounge.
- UK + Ireland donors most appreciate early access to tickets.

Most Donors Admit Benefits Are At Least Somewhat Important

Importance of Benefits On Giving Decision*

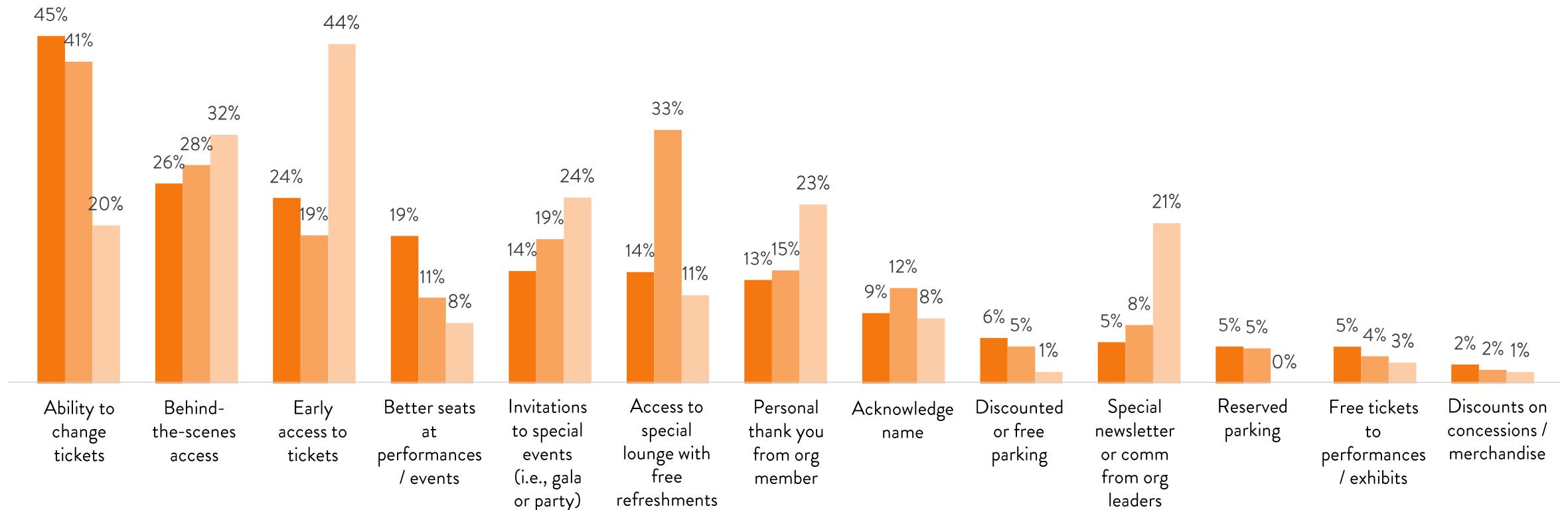


*Respondents who did not receive benefits or did not remember what benefits they received did not answer this question "How important are these benefits or rewards to your decision to donate the amount of money you do to [PIPE IN ARTS ORG]?"

Donors Value Ticket and Behind-the-Scenes Benefits Most

Most Valued Benefits from the Arts Org*

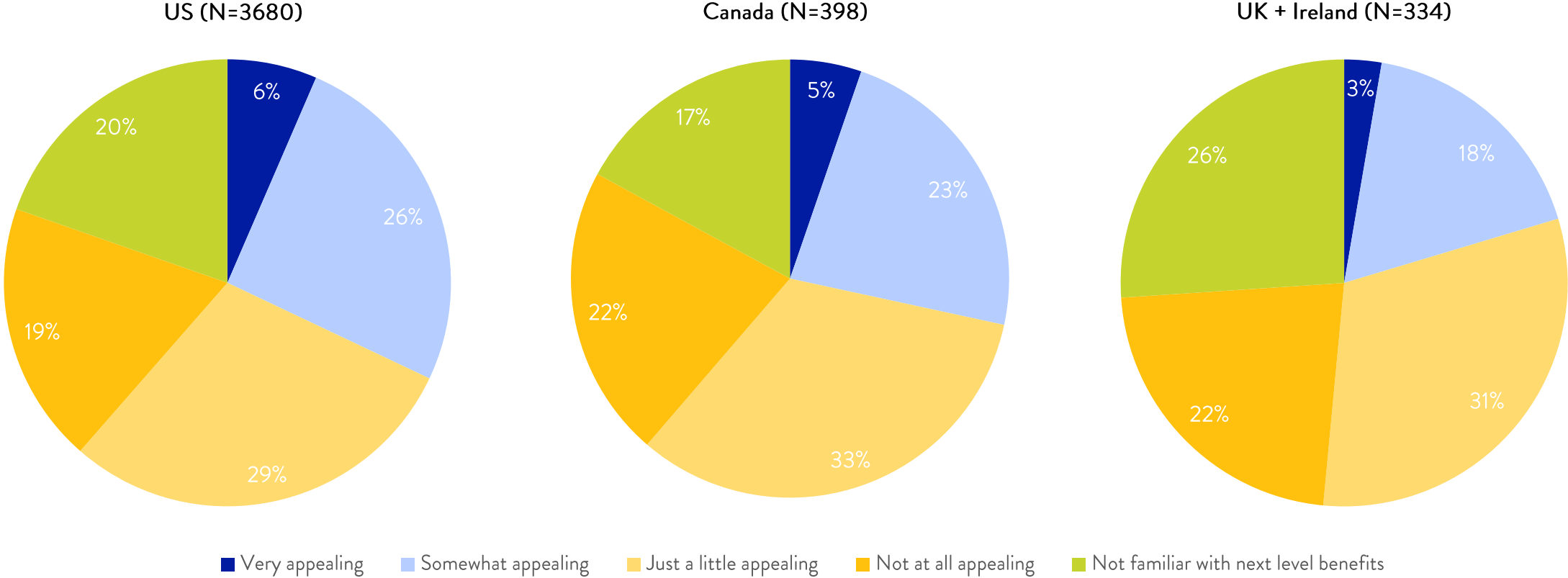
US (N=3680) Canada (N=398) UK + Ireland (N=334)



*Respondents who did not receive benefits or did not remember what benefits they received did not answer this question
 “Which of the benefits or rewards that you receive as a result of your donation to [PIPE IN ARTS ORG] do you value the most? Please select up to three.”

Most Donors Not Incentivized By Next Level of Benefits

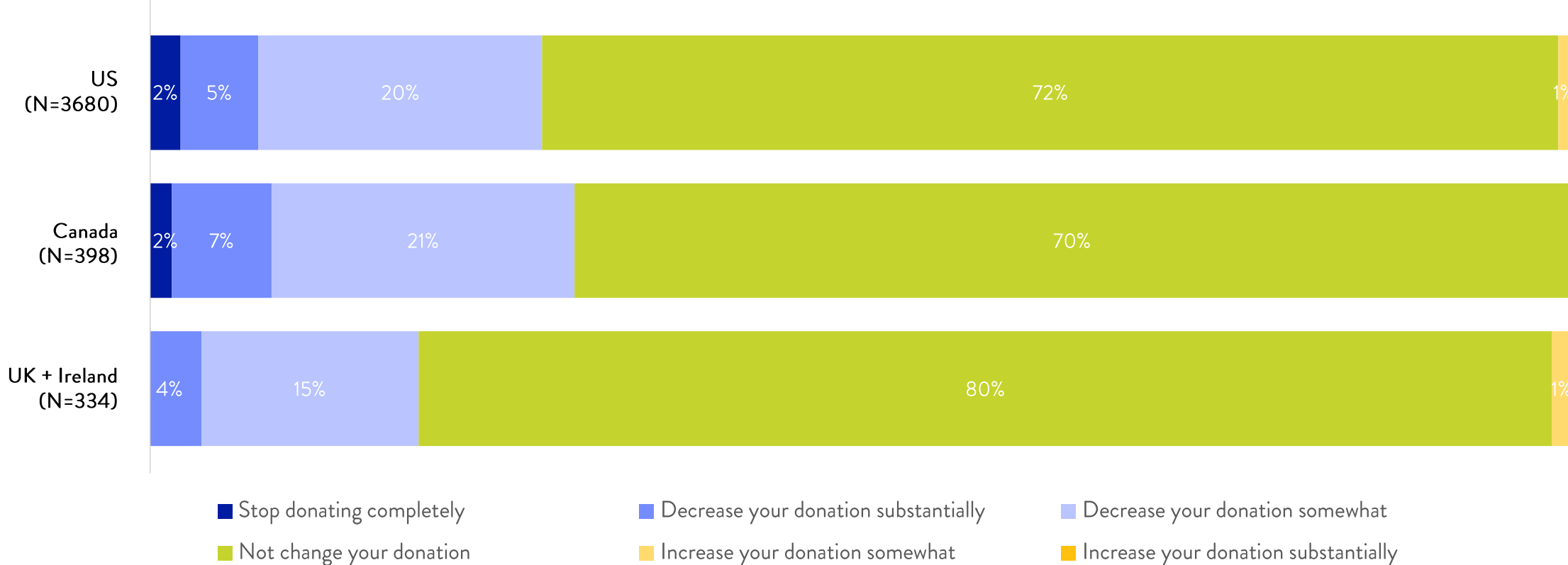
Appeal of Next Donor Tier's Added Benefits*



*Respondents who did not receive benefits or did not remember what benefits they received did not answer this question
 "How appealing to you are the added benefits or rewards you would receive if you increased your donation to the next level (once [PIPE IN ARTS ORG] is reopened and able to offer benefits again)?"

Most Donors Won't Alter Giving if Benefits Change

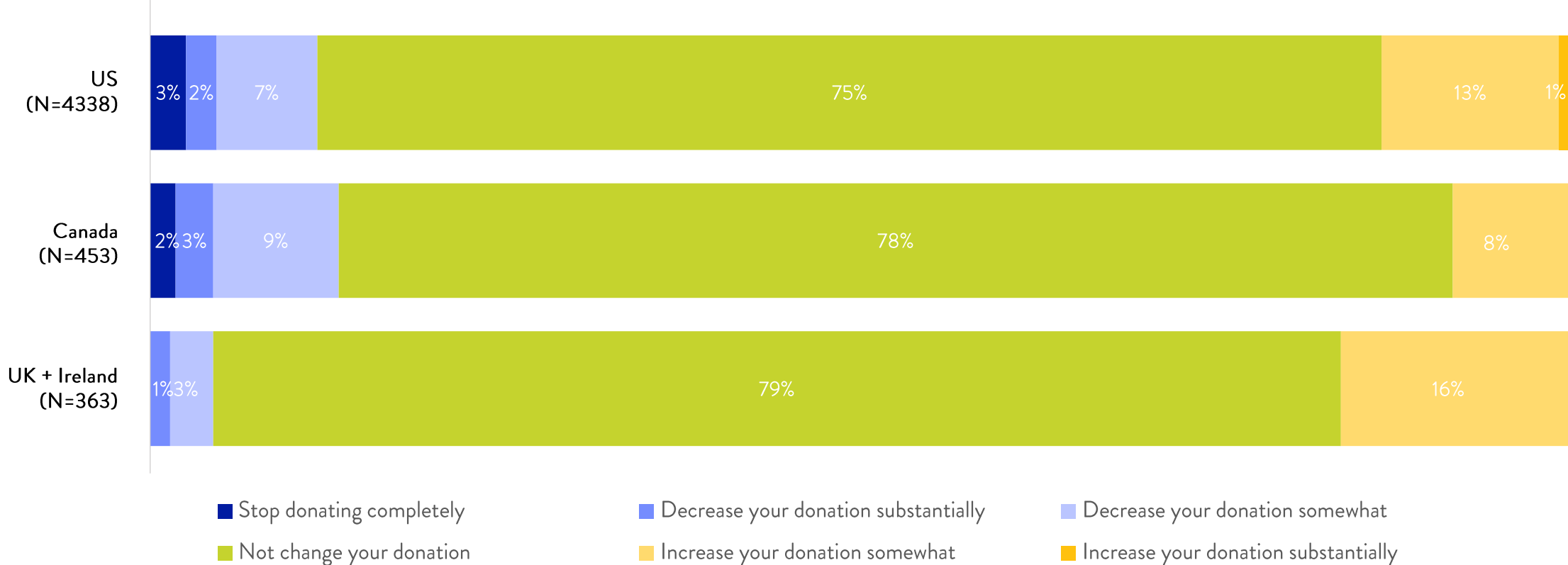
Anticipated Change in Donation if Benefits Are Modified/Eliminated*



*Respondents who did not receive benefits or did not remember what benefits they received did not answer this question
 "If [PIPE IN ARTS ORG] modified or eliminated the benefits or rewards you most value, would you:"

Donors Are Understanding of COVID-19's Impact on Benefits

Anticipated Change in Donation if Benefits Cannot be Offered Due to COVID-19, 2021/22 Season



“While there are positive signs that we may be emerging from the worst parts of the coronavirus pandemic, suppose [PIPE IN ARTS ORG] were unable to fully open or offer a full season in 2021 and, for a second year, were unable to offer their standard benefits or rewards to donors. Would you:”

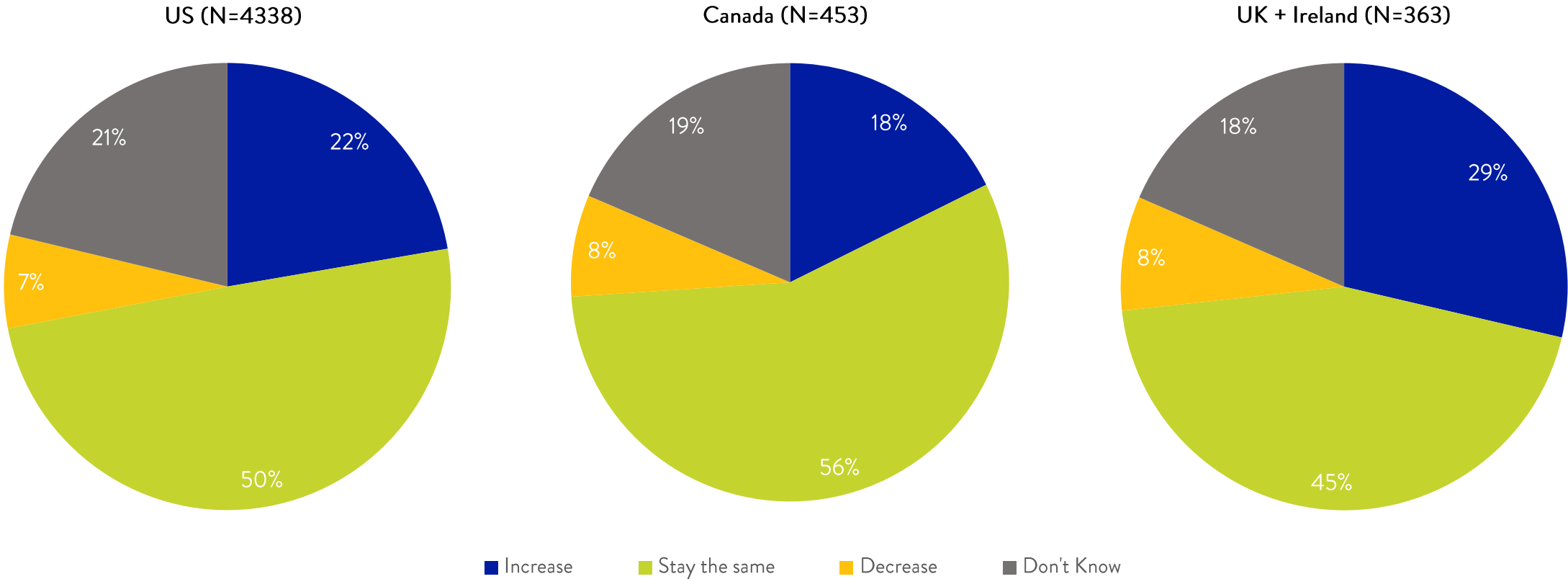
VI. Drivers of Donation Change

Among donors who say they will increase the amount they give to their arts organizations in the next few years, there are five principal reasons for increase: increased donor capacity, an appealing org campaign, greater perceived need by the org, an appealing or exciting organizational vision, or simply being asked.

- Overall, there were not many significant differences between region. However, UK + Ireland donors were considerably more likely than their U.S. and Canadian peers to say they planned to increase their giving to all charities in the coming years.

Most Planning to Increase or Maintain Giving to Arts Orgs

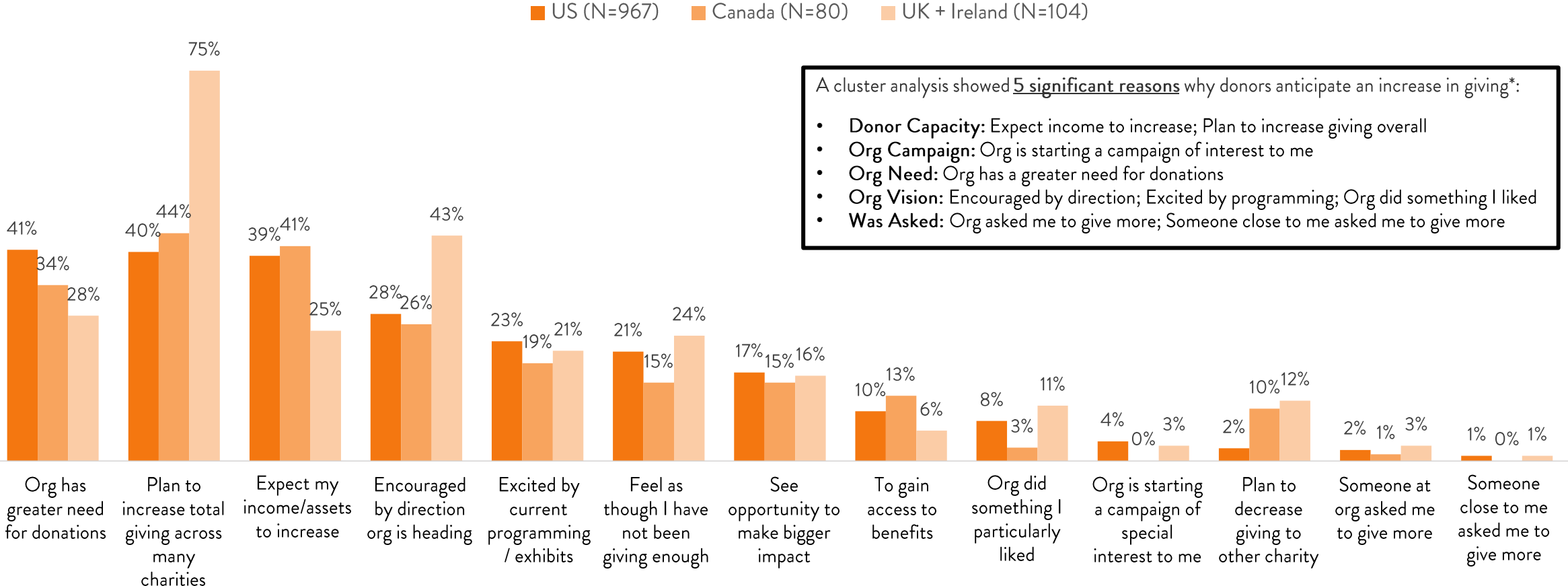
Anticipated Change in Donation to Arts Org Over the Next 5 Years



"Thinking forward across the next 5 years, do you expect the annual amount of money you donate to [PIPE IN ARTS ORGANIZATION] to increase, stay the same, or decrease compared to your donations over the past 3 years?"

Anticipated Giving Increase to Arts Org Driven By Five Reasons

Reasons for Planned Increase in Giving to Arts Org Over the Next 5 Years



A cluster analysis showed 5 significant reasons why donors anticipate an increase in giving*:

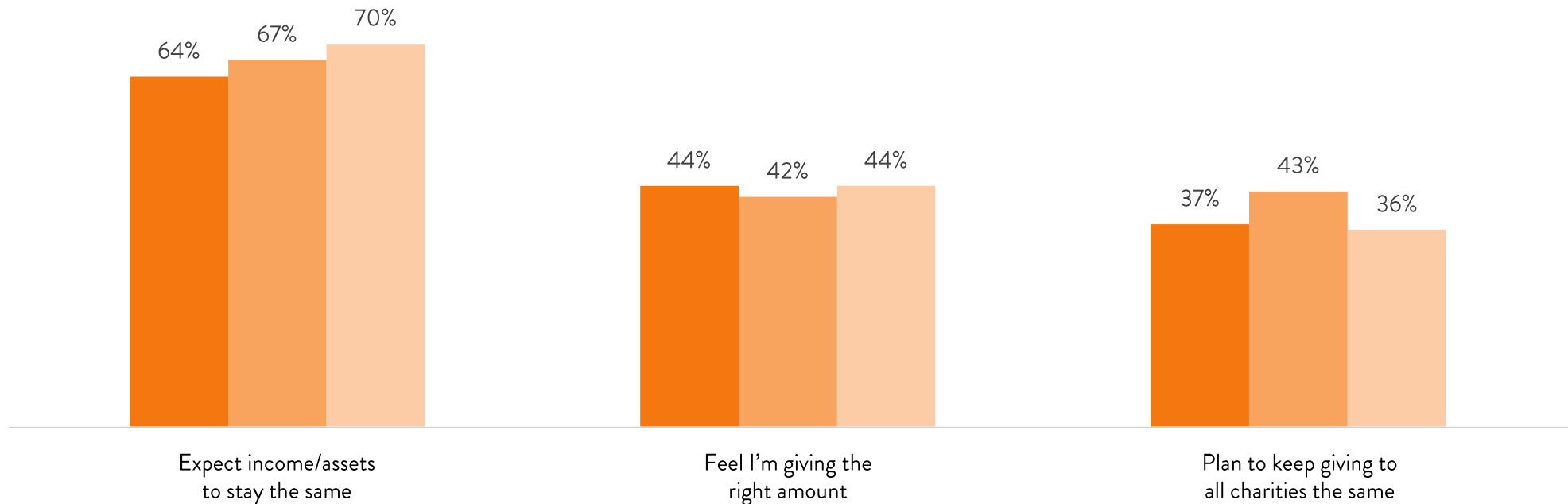
- **Donor Capacity:** Expect income to increase; Plan to increase giving overall
- **Org Campaign:** Org is starting a campaign of interest to me
- **Org Need:** Org has a greater need for donations
- **Org Vision:** Encouraged by direction; Excited by programming; Org did something I liked
- **Was Asked:** Org asked me to give more; Someone close to me asked me to give more

*Cluster analysis was performed using the overall data
 "For which of the following reasons are you planning to increase the amount you give to [PIPE IN ARTS ORG]? Please select all that apply."

Donor Capacity Most Cited Reason for Donation Stasis

Top 3 Reasons for Maintaining Giving to Arts Org Over the Next 5 Years

■ US (N=2156) ■ Canada (N=255) ■ UK + Ireland (N=162)



"For which of the following reasons are you planning to keep the amount you give to [PIPE IN ARTS ORG] the same? Please select all that apply."

VII. Overall Donation Strategy

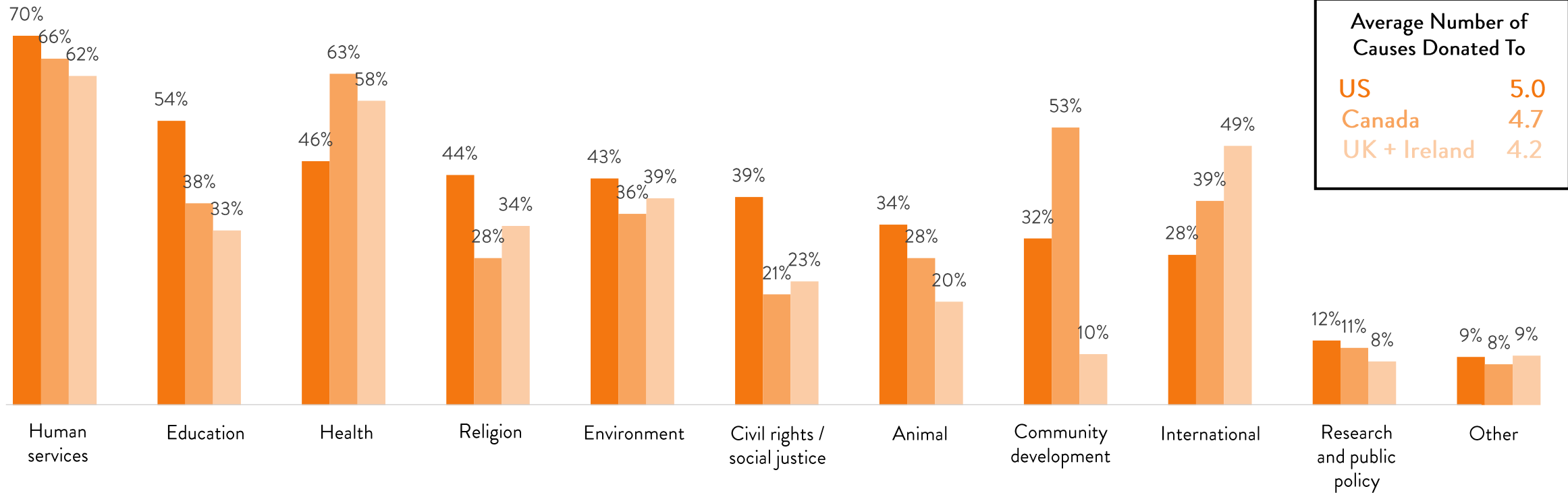
Arts donors also give to many other charities and non-profits that support a variety of causes (most notably those that provide human services e.g., food banks, homeless services, and social services). Despite giving away thousands – sometimes millions – of dollars, most donors admit they don't have an overarching donation strategy. Instead, they rely on gut and routine.

- There are some regional differences in the types of other charities arts donors supported, with U.S. donors more likely than their peers to give to education, Canadian donors especially likely to support health and community development causes, and UK + Ireland donors more inclined to give to health and international orgs.
- UK + Ireland donors are even more likely than other arts donors to say they have no financial strategy for their donation amounts.

Donors Have a Vast Giving Profile

Other Types of NFP Orgs Donated to in Past 3 Years

US (N=4338) Canada (N=453) UK + Ireland (N=363)

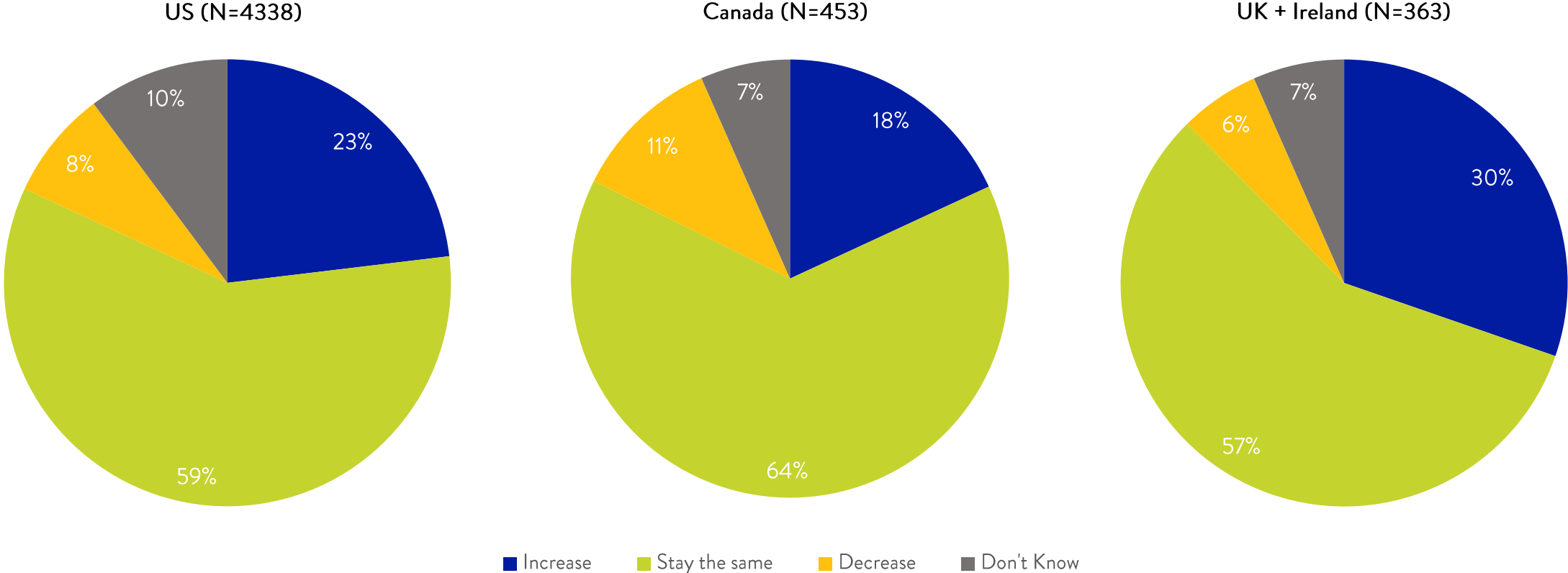


Average Number of Causes Donated To	
US	5.0
Canada	4.7
UK + Ireland	4.2

"To which of the following types of non-profit organizations did you donate money in the past 3 years? Please select all that apply."

Most Donors Plan to Maintain Overall Giving Amount

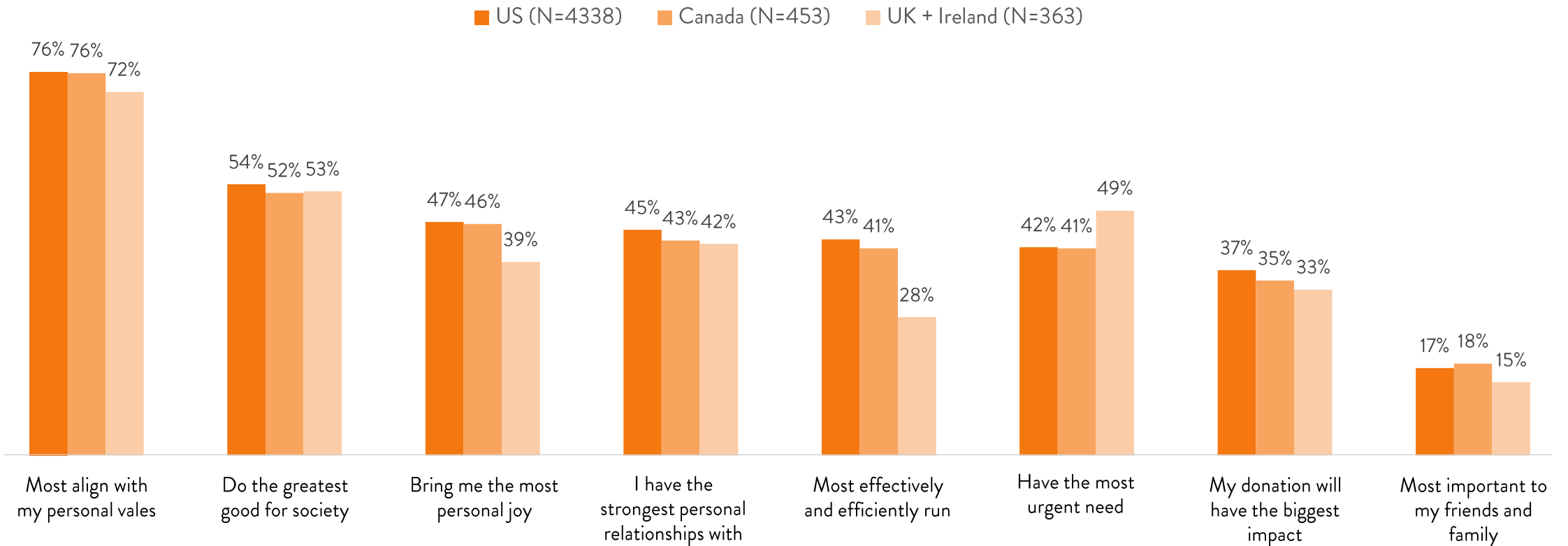
Plan for Giving Amount in 2021 to All NFP Orgs



"In 2021, do you expect the total amount of money you donate to non-profit organizations to increase, stay the same, or decrease, compared to what you donated over the last three years?"

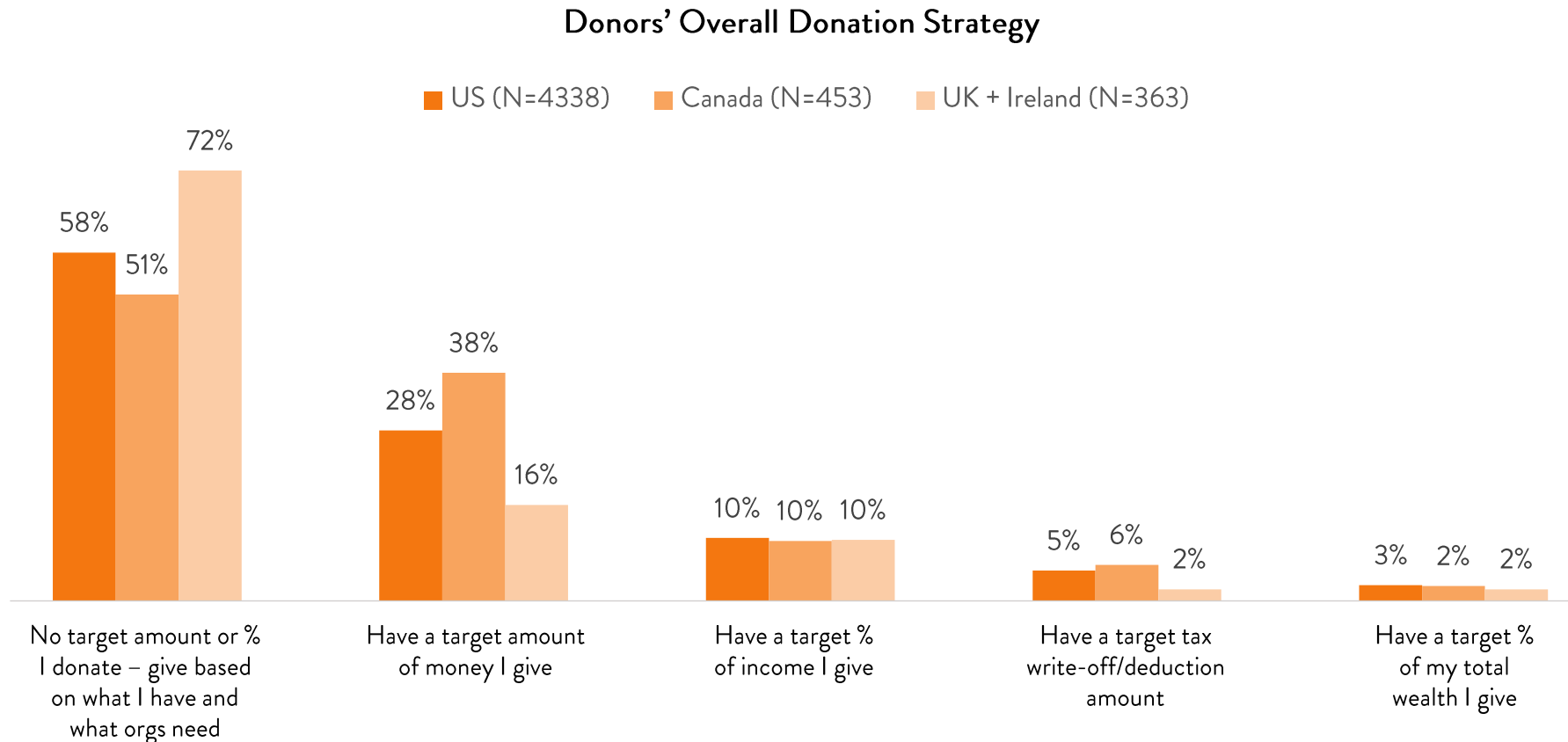
Donors Give to Charities That Share Their Values

How Donors Choose the NFP Orgs They Donate to Each Year



"Thinking about the specific non-profit organizations you decide to donate to in a given year, which of the following best describes how you decide where and how much to donate? Please select all that apply. I give to the non-profit organizations that..."

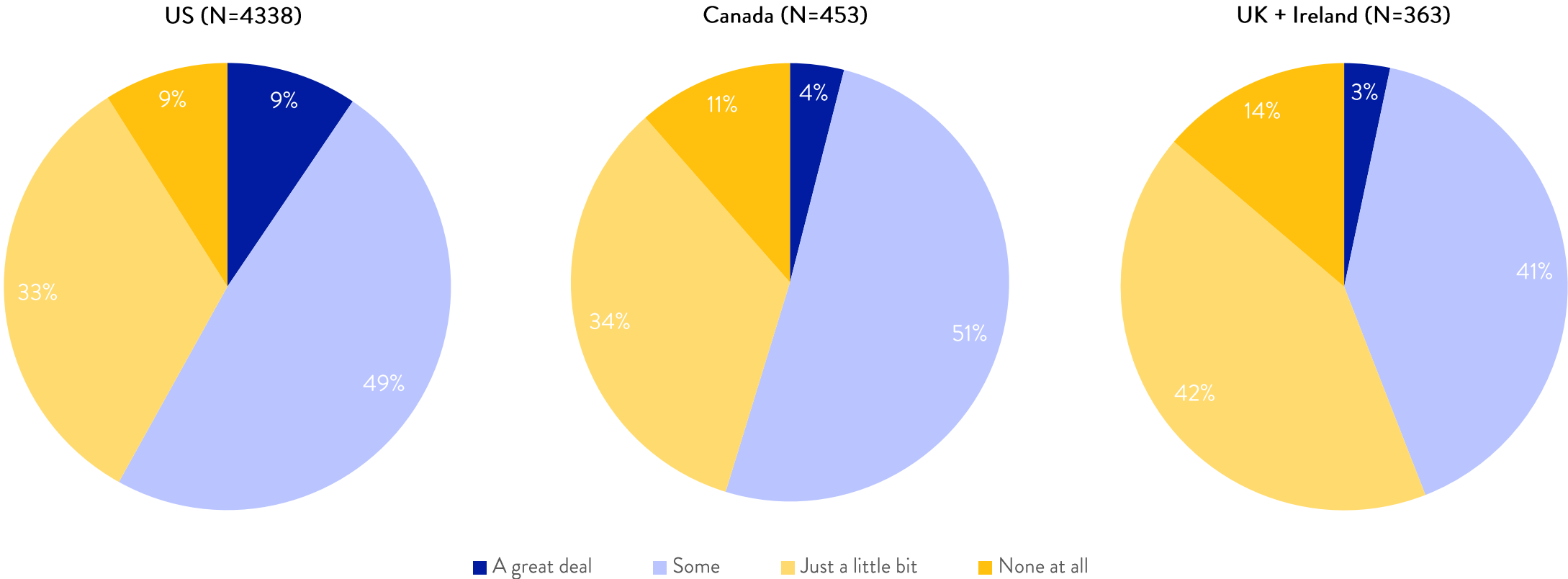
Majority of Donors Have No Personal Giving Target



“Thinking about the total amount of money you donate each year to all non-profit organizations, which of the following best describes how you think about your giving to non-profit organizations each year? Please select all that apply.”

Most Donors Don't Spend Much Time Planning Giving

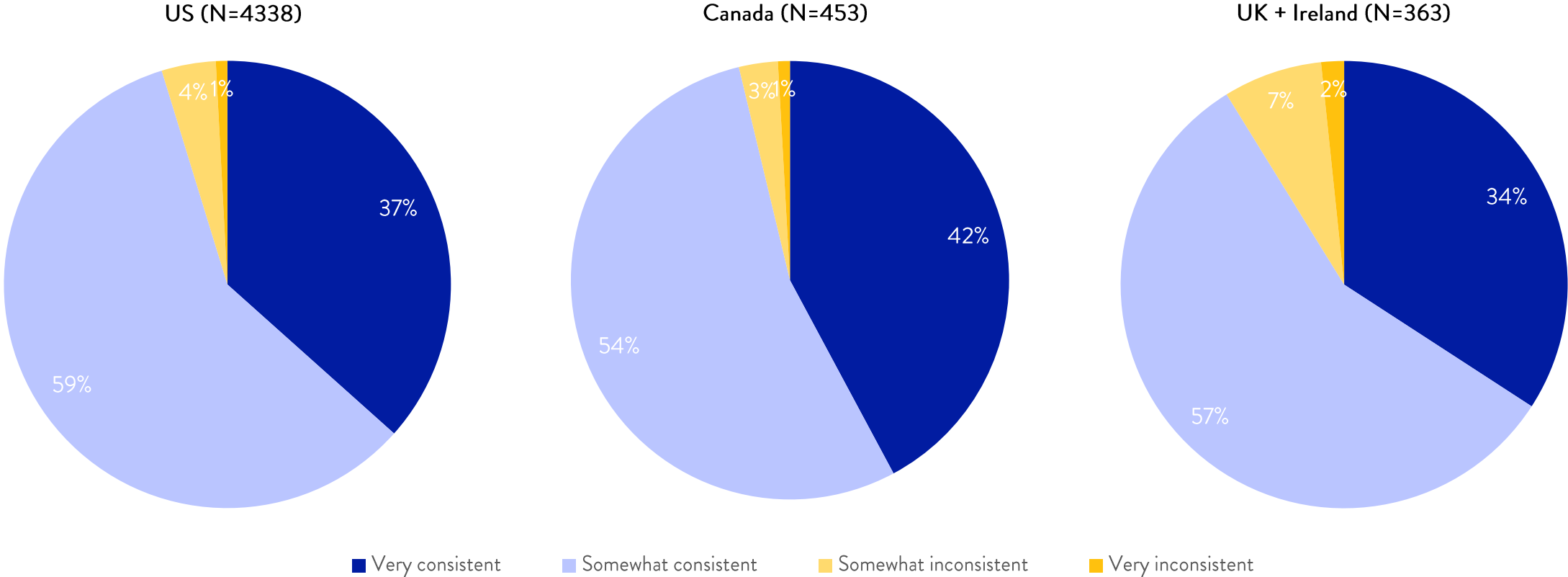
Time Spent Planning Donations Each Year



“How much time do you spend considering, researching, and planning your giving to non-profit organizations each year?”

Most Donors Give To The Same Orgs Every Year

Consistency of Orgs Donated to Each Year



“How consistent is the set of non-profit organizations you donate money to in a given year?”

About Advisory Board for the Arts

ABA partners with arts leaders and their teams to innovate, elevate performance, and affect sustainable change.

Our Approach:

ABA provides scale to the world of the arts by creating a virtual shared learning network allowing any issue to be attacked not by what is available to one arts organization, but by accessing every idea, in every geography, across every art form and every industry.

Member Benefits & Services:

PROPRIETARY RESEARCH

-  Signature Research Initiatives
-  Benchmarks and Case Studies
-  Custom Research and Data Reports

ON-DEMAND RESOURCES & SUPPORT

-  Data Analytics and Tactical Tools
-  Member Website Access
-  Private Consultations

NETWORKING & CONSULTING SERVICES

-  Member Summits and Executive Retreats
-  Peer Networking Groups
-  Private Research Briefings
-  Strategy Facilitation

IMPLEMENTATION TOOLS & SERVICES

-  Implementation Guides & Toolkits
-  Interactive Workshops
-  Diagnostic Tools

Signature Research Initiatives :



ABA Members: A Global Network at the Ready

