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Transforming Arts Organizations Worldwide

Survey of Individual Donors to the Arts

Quantitative Report and Analysis

June 2021

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I. Study Approach & Respondent Profile

Overview of ABA's Research: *Redefining the Donor Value Proposition*

The Key Question



How can arts organizations more effectively tap into individual donors' deeper, more philanthropic motivations to give (instead of relying on transactional benefits)?

Our Research Approach



Conversations with heads of development and other experts at 50+ arts organizations

In-depth interviews with 20+ individual arts donors

Quantitative survey of 5,000+ individual arts donors*

**The focus of this report*

Research Outputs



Four Day Virtual Summit – May 2021**

Comprehensive Quantitative Analysis of Donor Behaviors and Motivations

Best Practice Case Studies

Workshops, Tools, and Templates

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

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.

Survey Questions

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

47 Participating Organizations

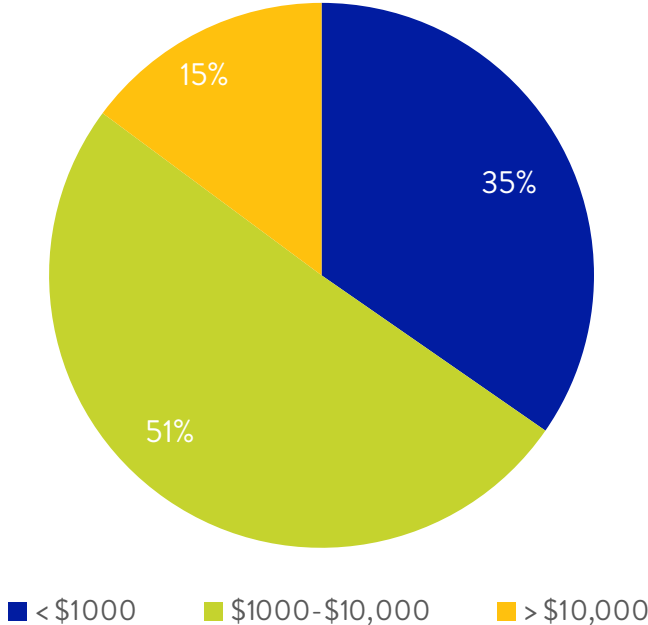


Respondent Average Giving to Arts Organizations

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

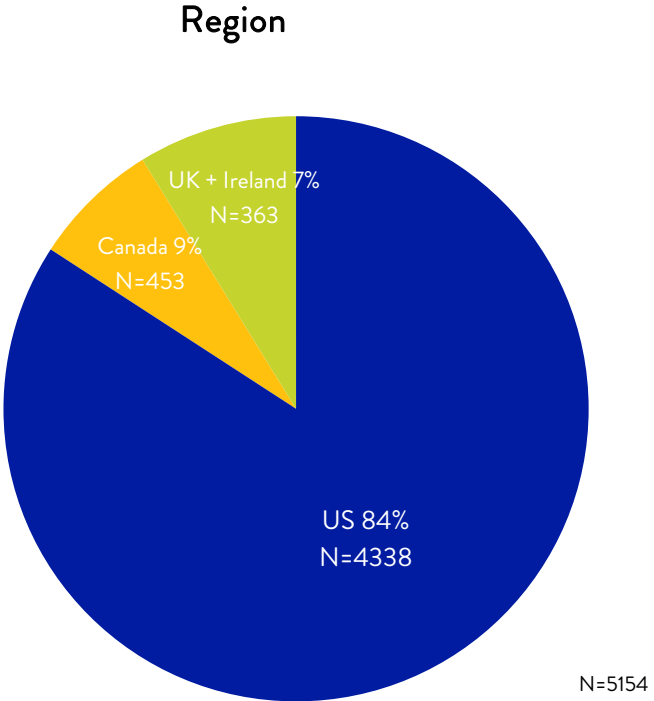
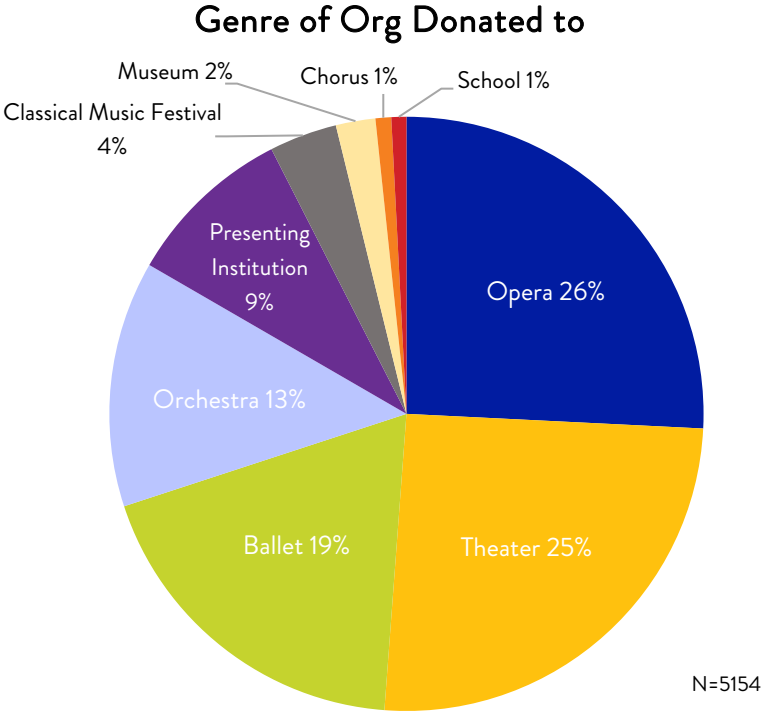


Distribution by Average Giving *Cumulative Amount in US Dollar Equivalent, 2018-2020*

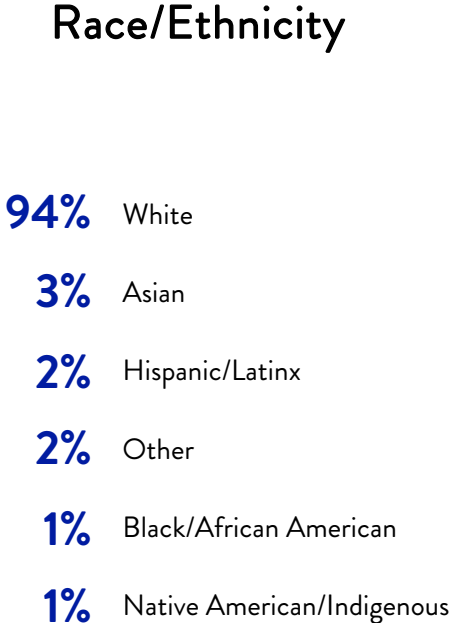
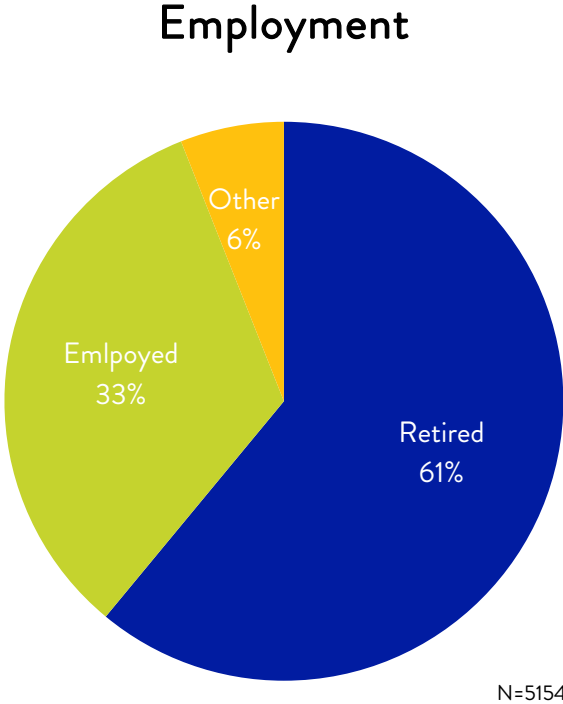
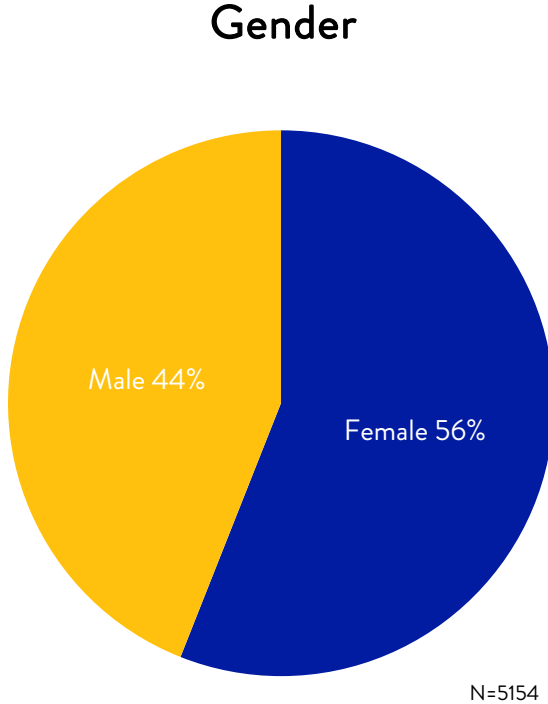
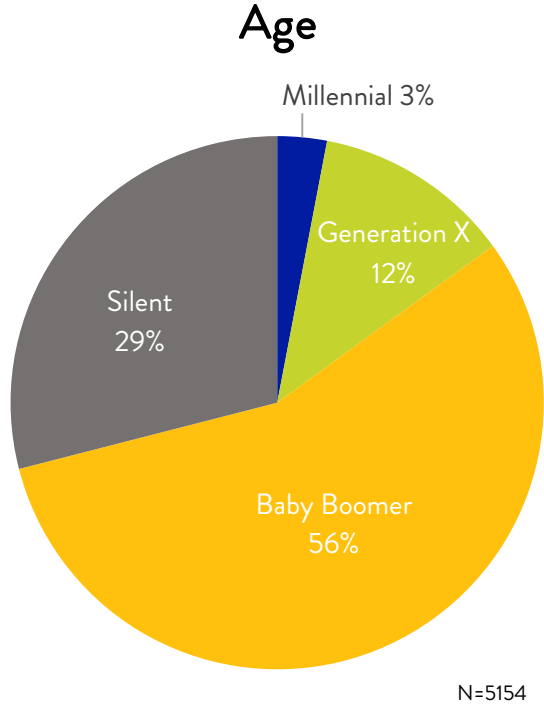


N=4912
Survey participants reported their giving in local currency by year and type for 2018, 2019, and 2020
Survey participants who did not report their 2018-2020 donation amounts were filtered out and extreme outliers were removed from these averages

Respondent Genre and Region



Respondent Demographics



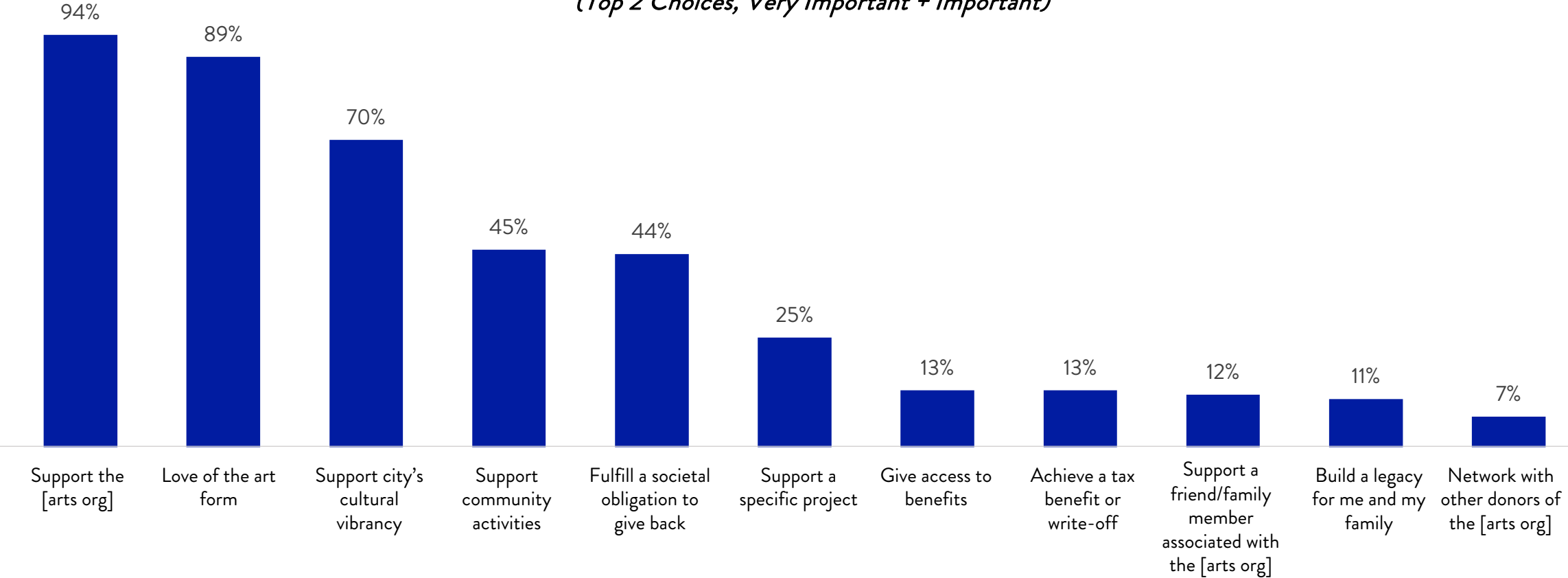
N=4338
US participants only
Multiple responses accepted

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. The three groups are roughly equal in size. Arts Lovers comprise the largest share of small donors, while Community Donors give the most overall.

Why Donors Give to the Arts

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

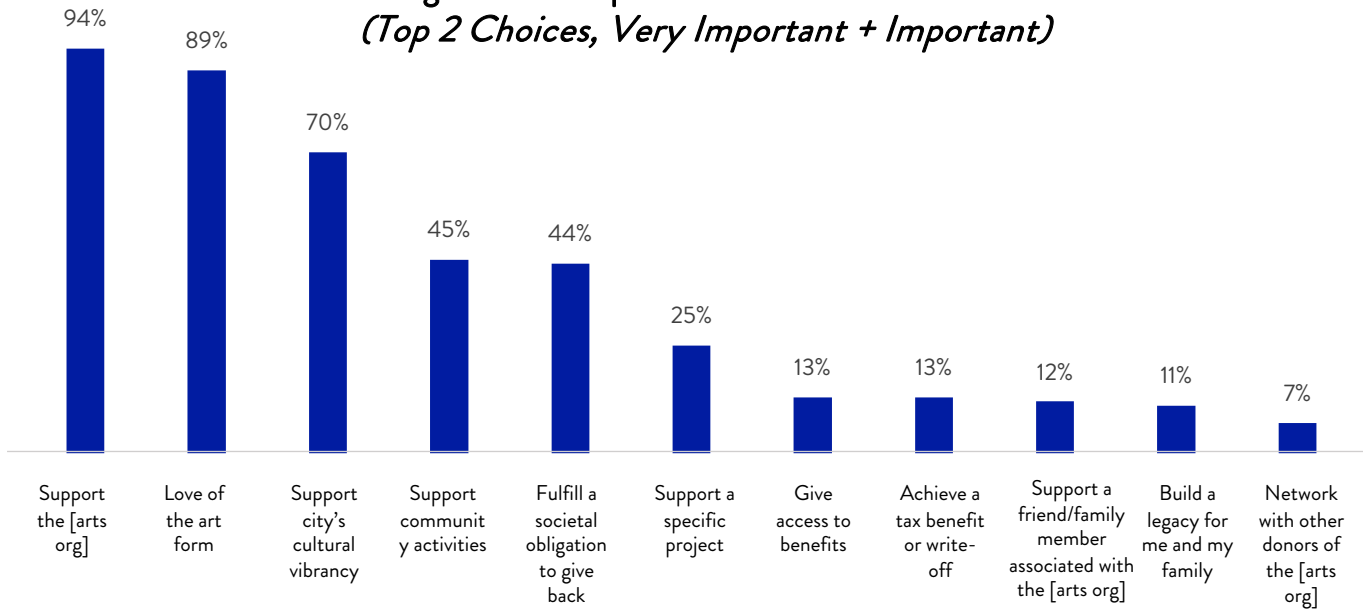


N=5154
 "People donate money for many reasons. For each of the following, please indicate how important that reason was in your decision to donate to [PIPE IN ARTS ORG] in the last three years."
 Throughout this report, [PIPE IN ARTS ORG] and [arts org] indicate when the name of the arts organization was inserted into the survey.

What Donors Say and How We Untangle What's Important

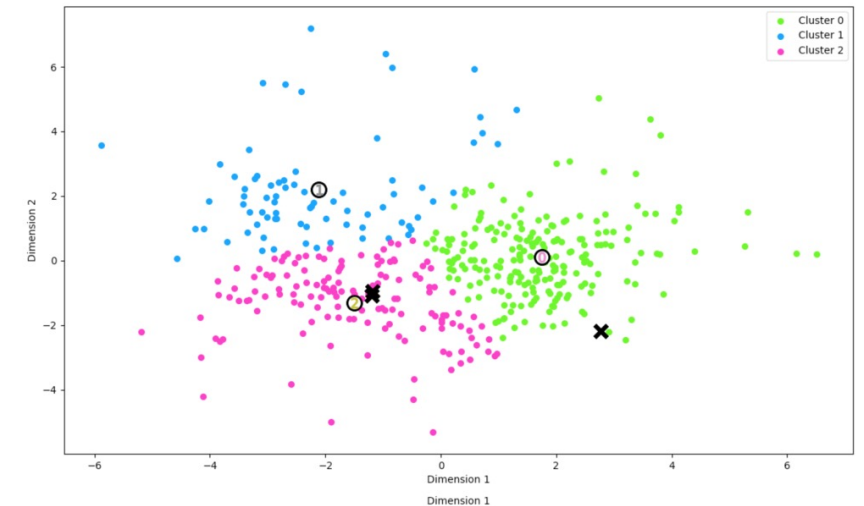
Our survey asked donors to rate the importance of 11 motivations for donating to their arts organization. Nearly all donors say that supporting the arts organization and love of the arts is important. In order to learn more from these ratings, ABA ran a cluster analysis to find patterns across all the 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
(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

31% of donors



Arts Lovers

Primary Motivations:

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

38% of donors



Community Donors

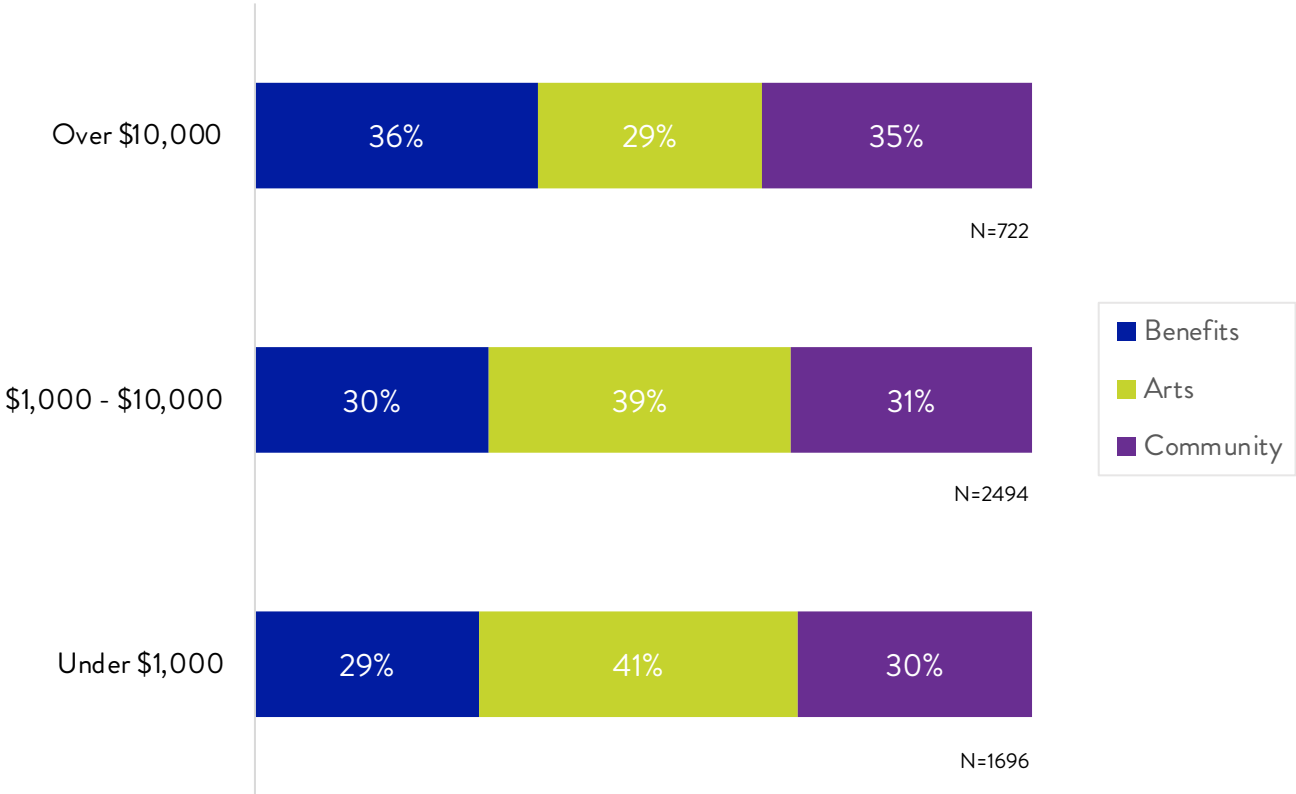
Primary Motivations:

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

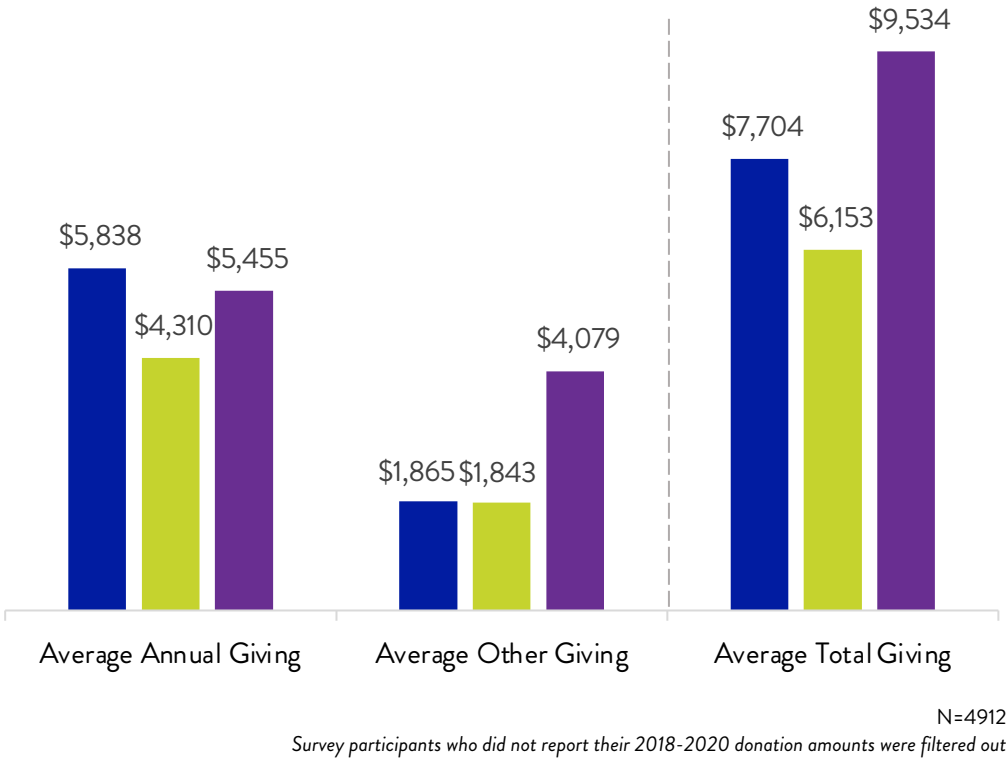
31% of donors

Arts Lovers Smallest Share of Biggest Donors; Community Donors Give the Most

Percent of Donors in Each Segment, By Donation Level
Cumulative Amount in US Dollar Equivalent, 2018-2020



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



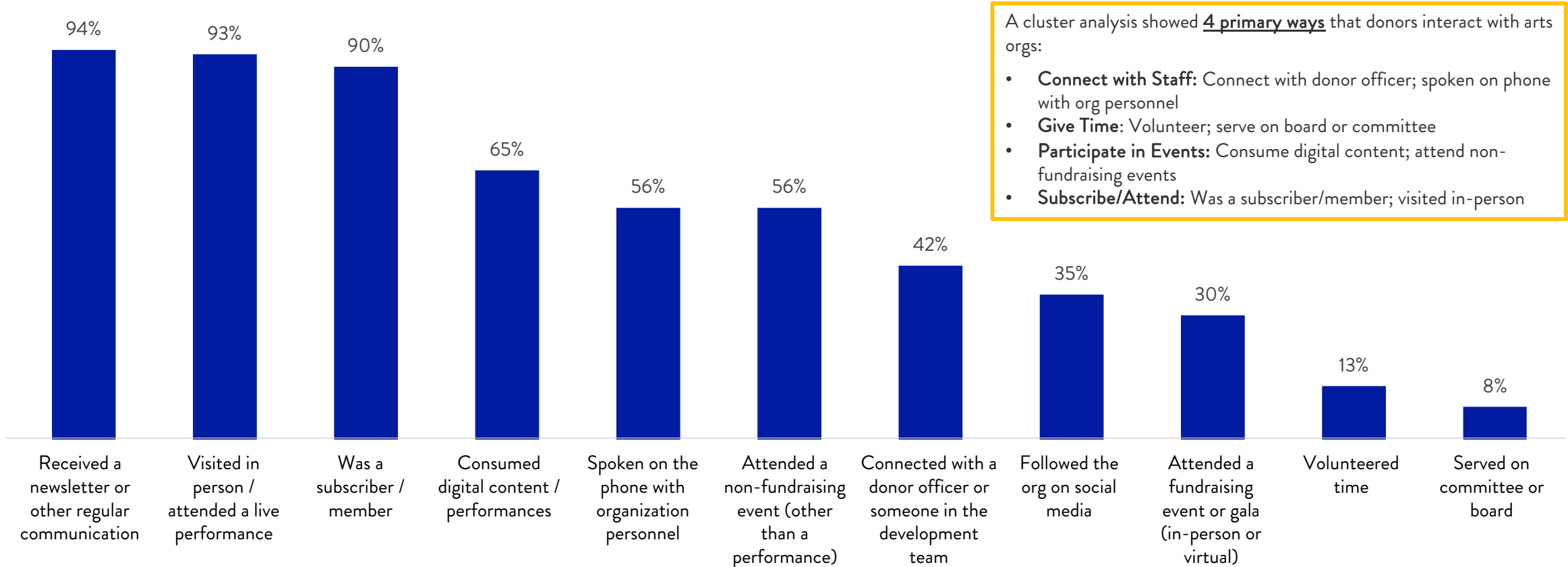
III. Arts Organization Connections

Arts donors are extremely involved with their arts organizations, including 90% who are also subscribers or members. But 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.

Donors Are Very Involved with Arts Orgs

Donor Involvement With Arts Org in the Past 3 Years

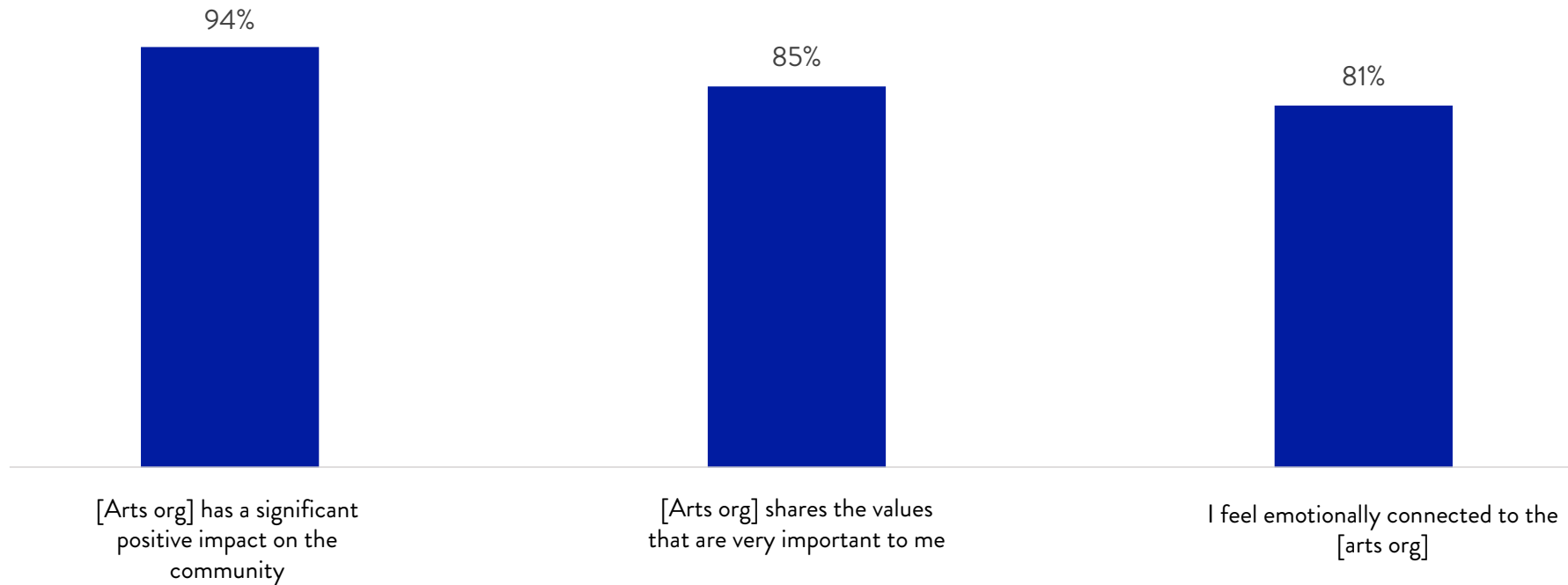


N=5154

"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

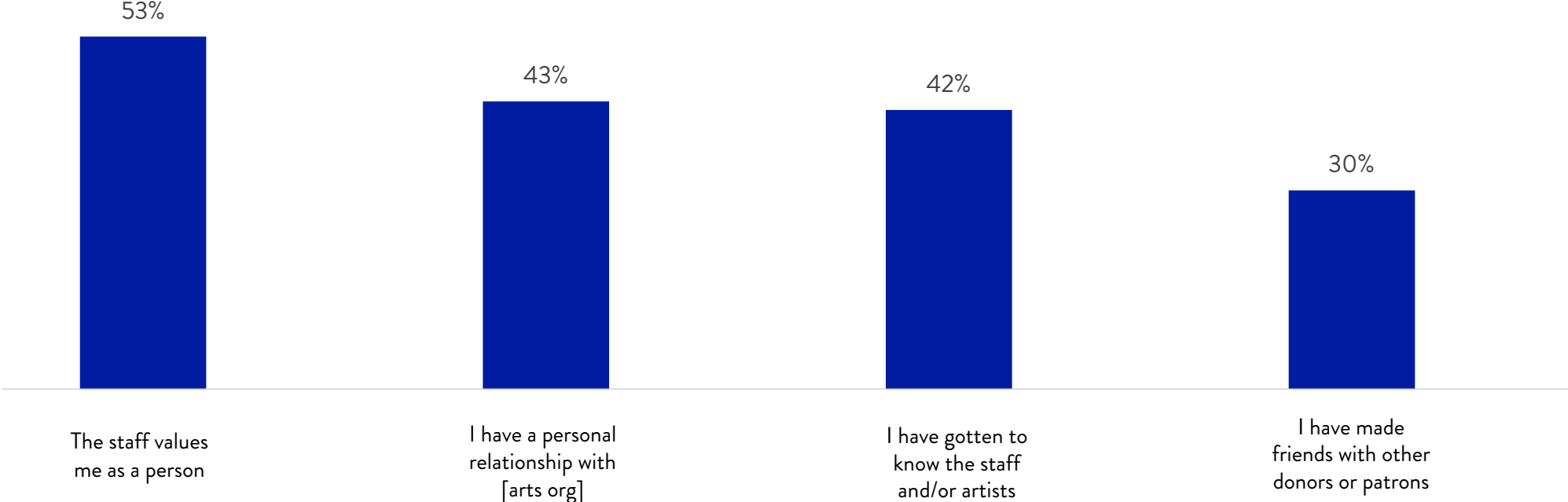
Beliefs About Arts Organization
(Top 2 Choices, Strongly Agree + Somewhat Agree)



N=5154
"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 Donors

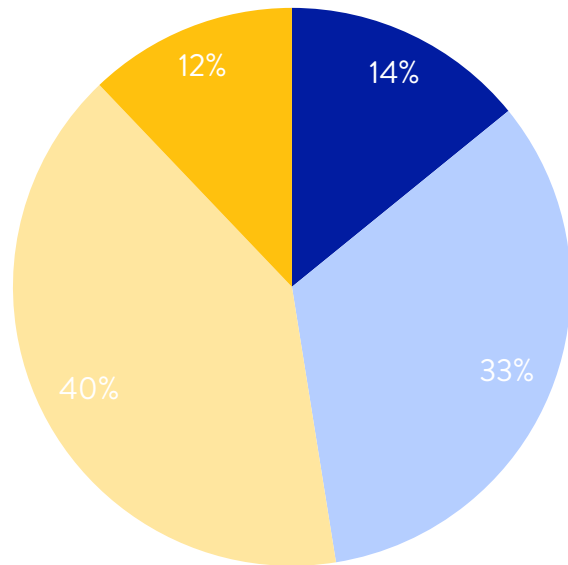
Connection to Arts Organization
(Top 2 Choices, Strongly Agree + Somewhat Agree)



N=5154
"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 Orgs Often Among Donor's Top 3 Gifts

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

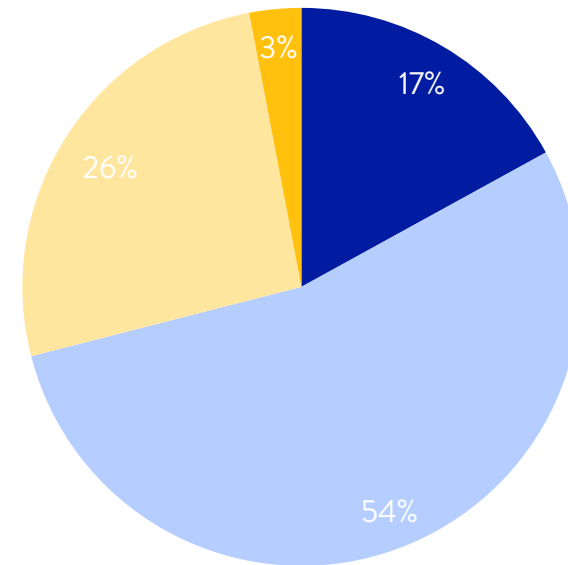


- Donated the most
- One of top 3 total donations
- One of top 10 total donations
- Not among top 10 total donation

N=5154

"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?"

Priority of Arts & Culture Organizations Overall in Relation to Total Giving



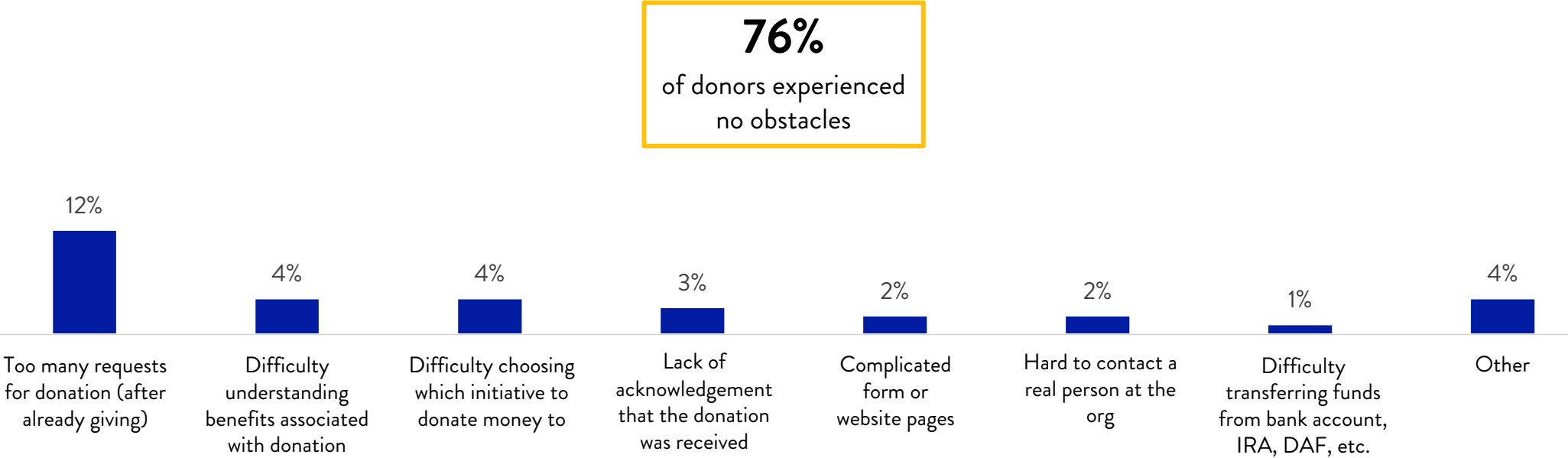
- Top Priority
- One of top 3 priorities
- One of top 10 priorities
- Not among top 10 priorities

N=5154

"Thinking about all the non-profit organizations you support, how do you prioritize **arts and cultural organizations?**"

Not a Lot of Obstacles Faced in Donating

Challenges Encountered Donating to the Arts Org

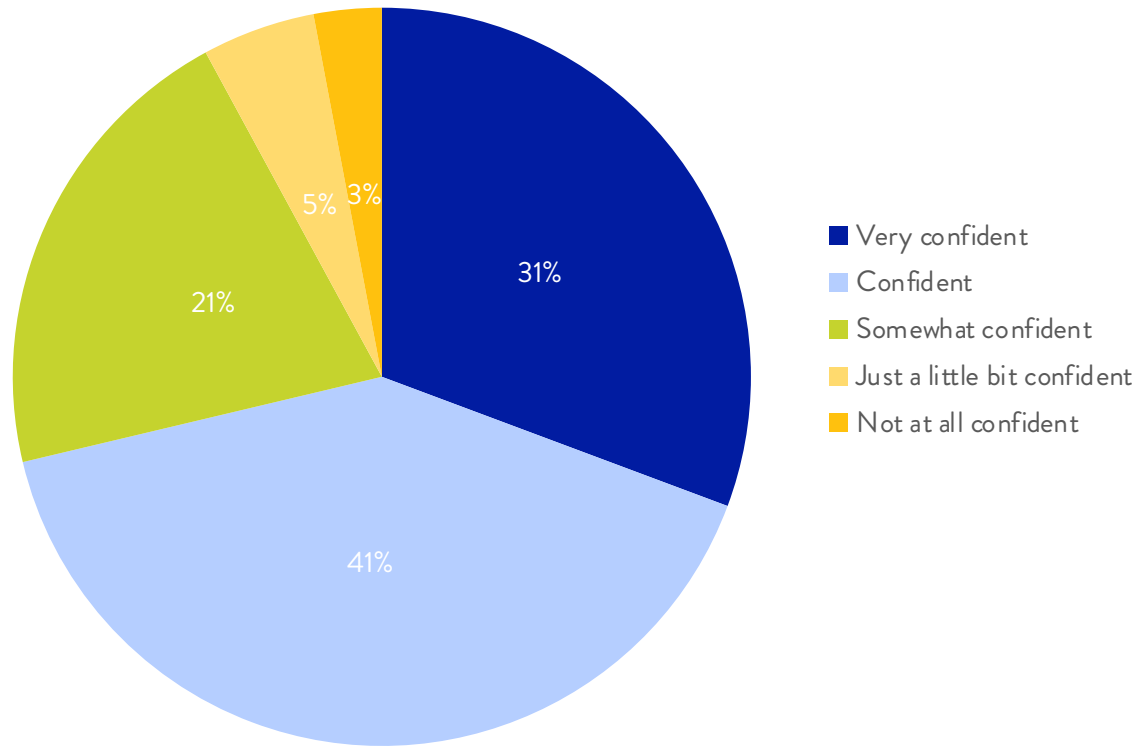


N=5154

“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”

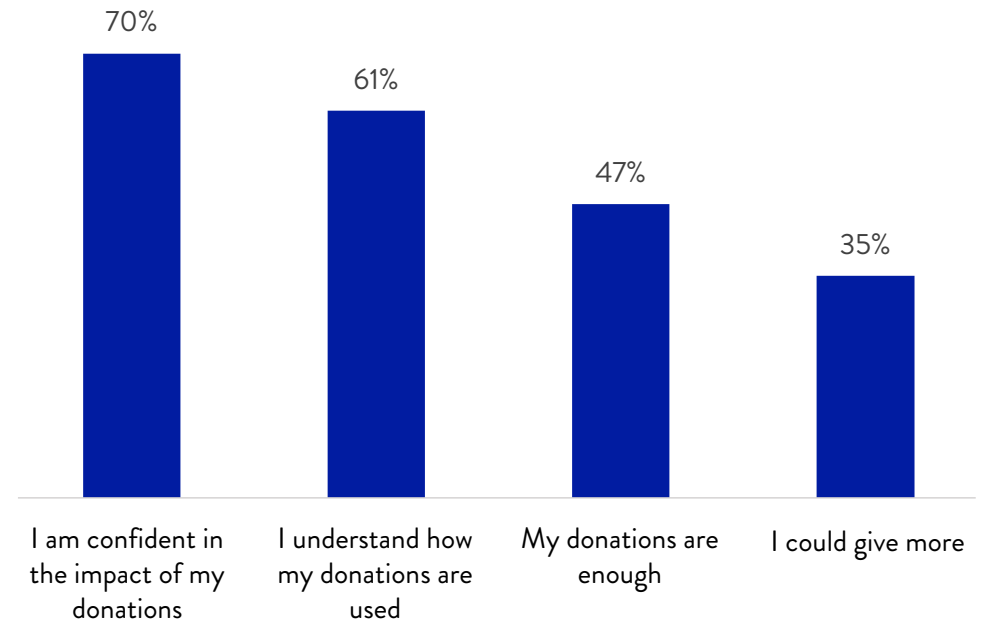
Confidence in Giving the “Right Amount” to Arts Organization



N=5154

“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.”

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

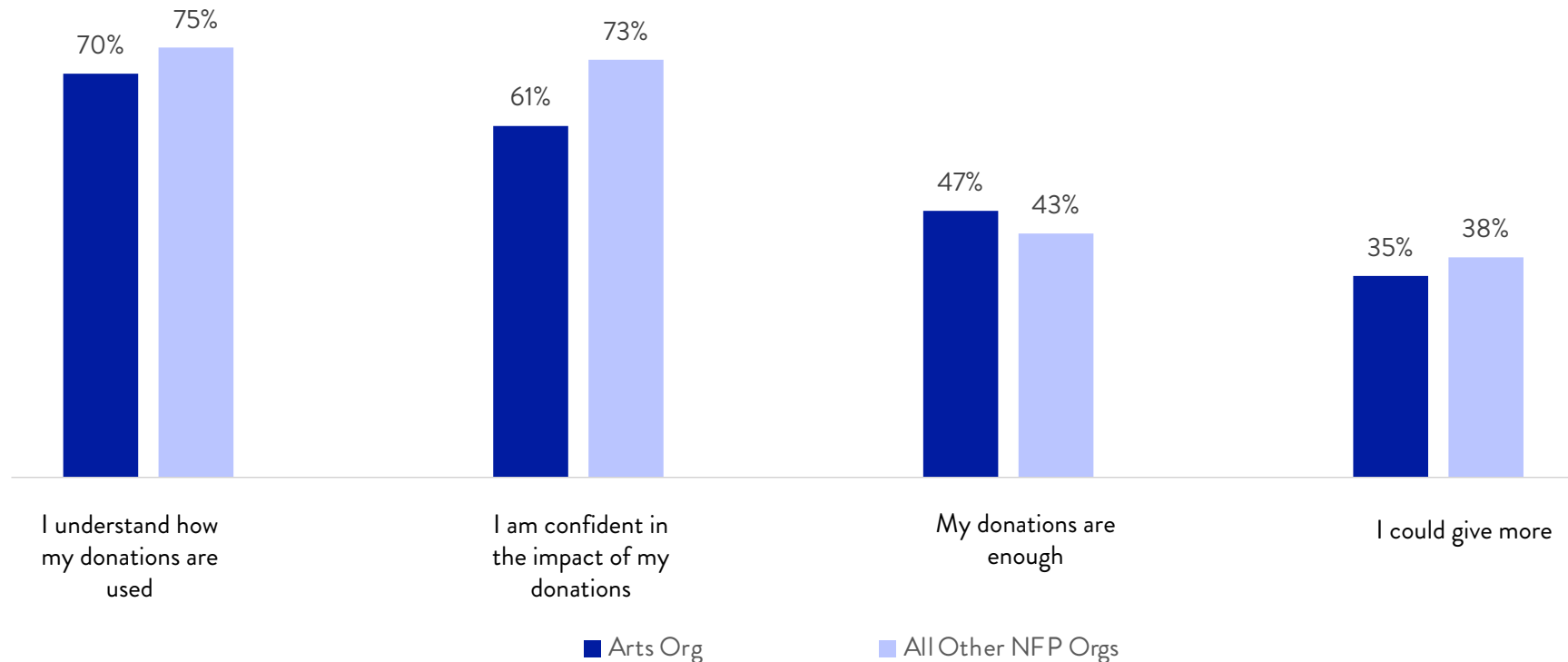


N=5154

“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 Improve Arts Donor Confidence & Understanding

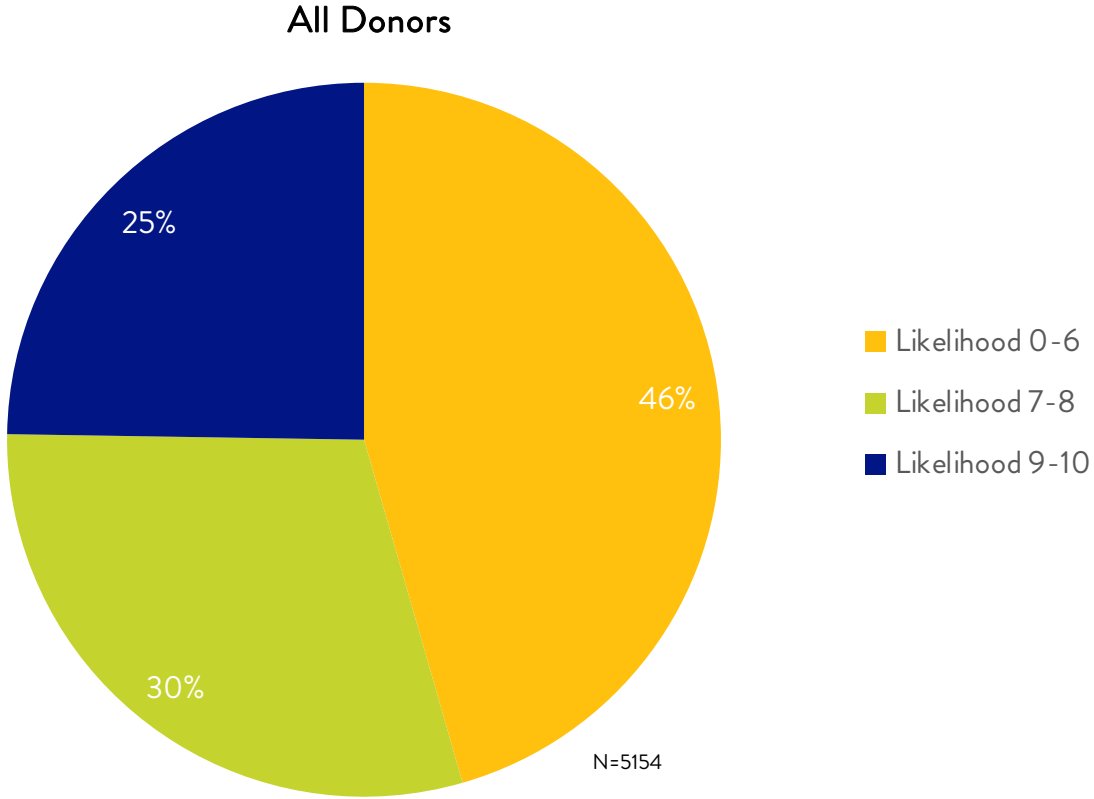
Feelings About Donations to Arts Org vs. All Other Non-Profits
(Top 2 Choices, Strongly Agree + Somewhat Agree)



N=5154
"Below are a number of statements about your donation(s) over the last three years to [PIPE IN ARTS ORG] / all other NFP orgs other than [PIPE IN ARTS ORG]. Please indicate if you agree or disagree with each one."

Room to Grow Smaller Donors Into Advocates

Likelihood to Recommend Family and Friends to Donate to Arts Org



% Likelihood 9-10, by Donation Level *Total Giving 2018-2020*

Under \$1,000	\$1,000 - \$10,000	Over \$10,000
19%	27%	36%
N=1696	N=2494	N=722

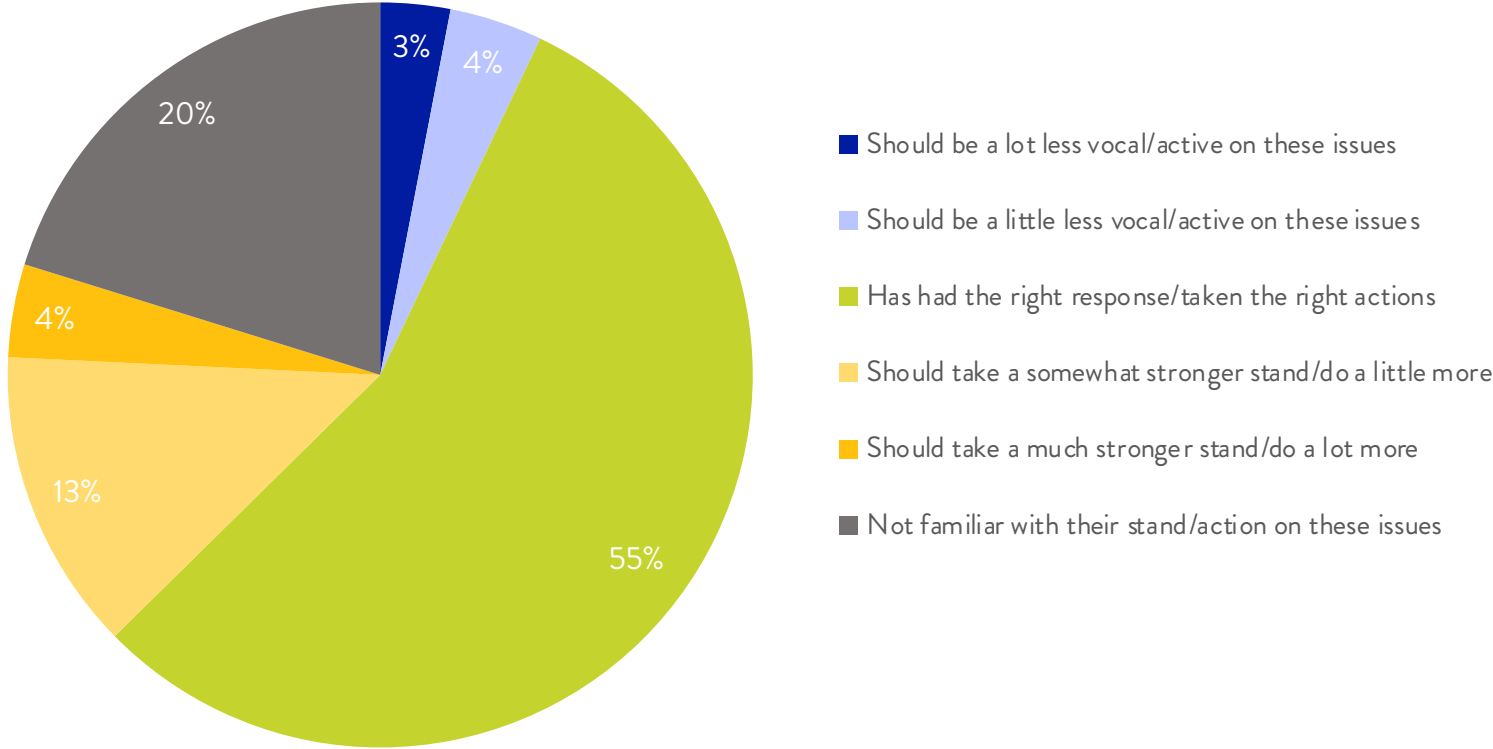
*“On a scale of 0 to 10, how likely are you to recommend that your friends and family donate to [PIPE IN ARTS ORGANIZATION]?”
Scale groupings based on traditional Net Promoter Score categories: 0-6: “Detractor,” 7-8: “Passive,” 9-10: “Promoter”*

IV. Reactions to Arts Organization DEI&A Stance

Arts donors are generally satisfied with their organization's stance and actions related to issues of diversity, equity, inclusion, and accessibility (DEI&A). However, when examining results by age and race, it is clear that younger donors and donors of color with arts organizations would do more to advance the cause.

Most Donors Satisfied with Arts Orgs' DEI&A Stance

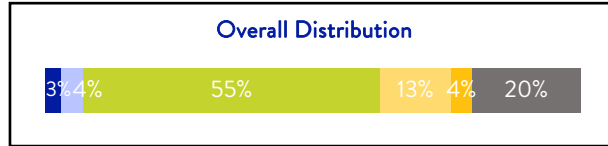
Arts Org Response to DEI&A and Social Justice Issues



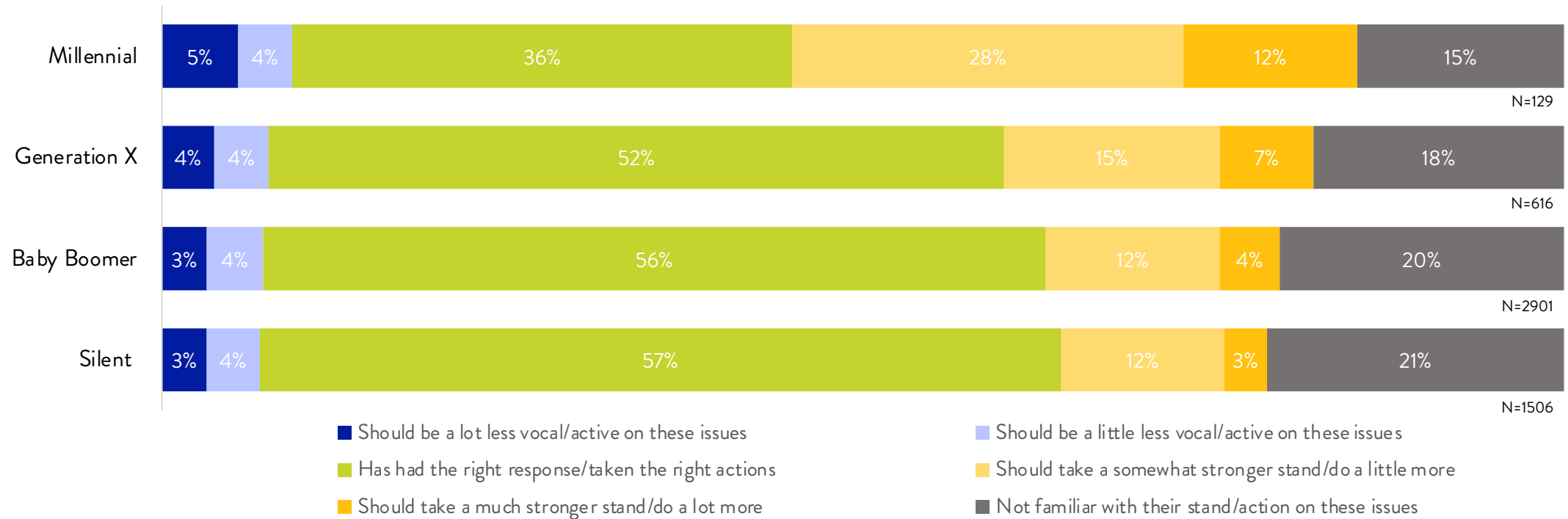
“As you may have seen or heard, issues related to **diversity, equity, inclusion, and social justice** are frequently in the news these days. Which of the following best describes your feeling on how [PIPE IN ARTS ORG] has responded to or dealt with these issues?”

N=5154

Younger Donors Desire More Action from Arts on DEI&A

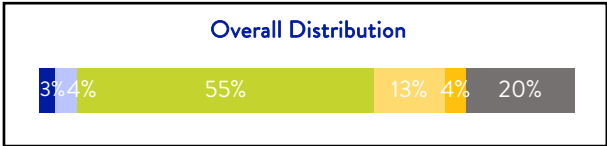


Arts Org Response to DEI&A and Social Justice Issues, by Generation

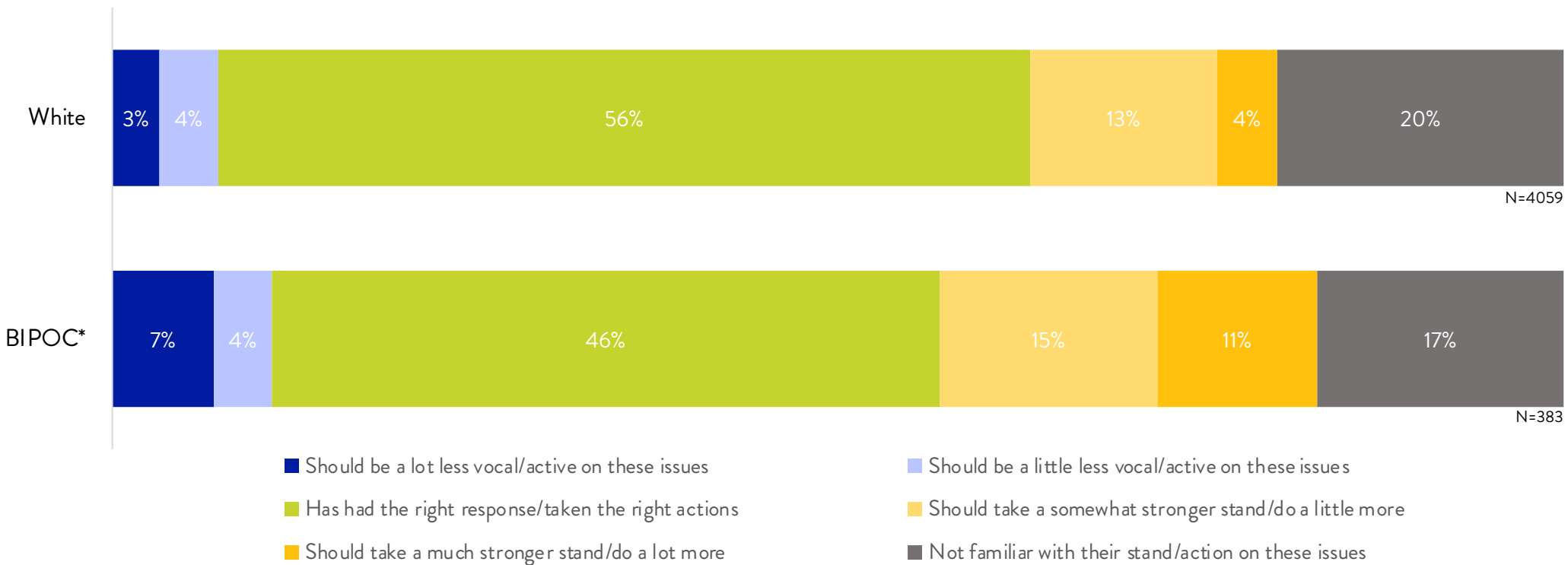


“As you may have seen or heard, issues related to **diversity, equity, inclusion, and social justice** are frequently in the news these days. Which of the following best describes your feeling on how [PIPE IN ARTS ORG] has responded to or dealt with these issues?”

BIPOC Donors More Likely to Call for More Arts Action



Arts Org Response to DEI&A and Social Justice Issues, by Ethnicity



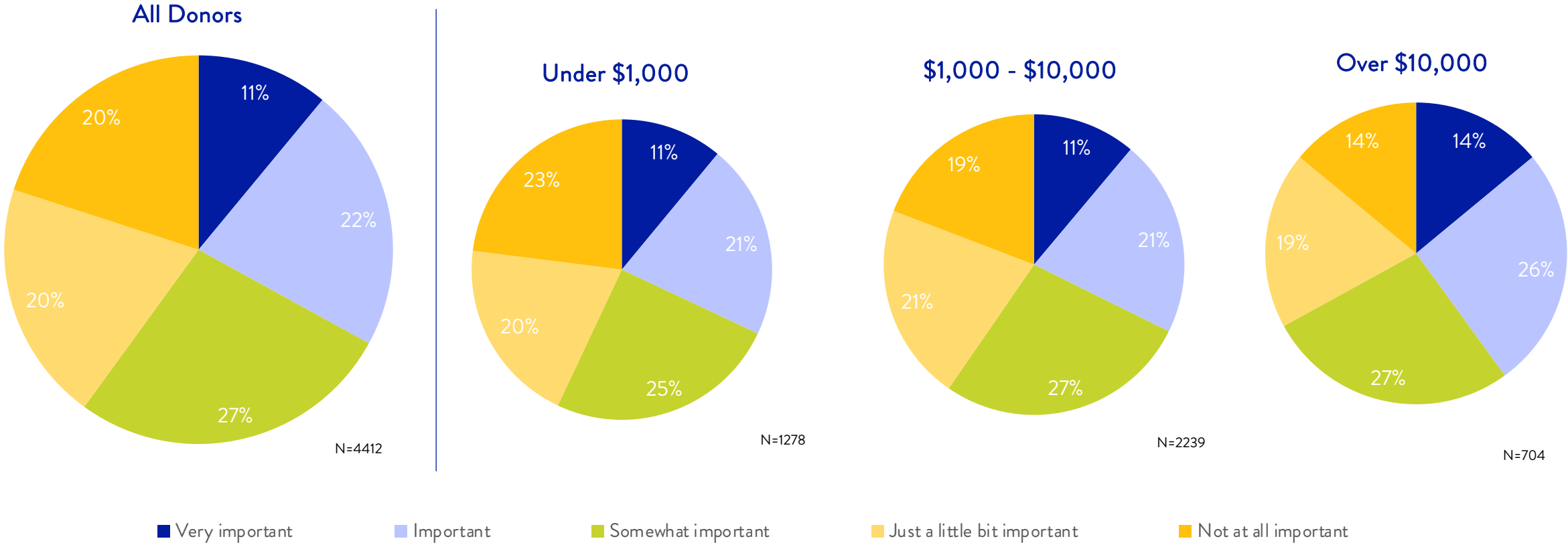
*BIPOC includes respondents who indicated they were Asian, Hispanic/Latinx, Black/African American, Native American/Indigenous, Pacific Islander, or Other in the survey question about race/ethnicity. Asked in the US only.
 "As you may have seen or heard, issues related to **diversity, equity, inclusion, 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 downplay the importance of benefits in their giving, saying they are only “somewhat” or “a little bit” important. They also claim they would not significantly (if at all) reduce their giving should benefits be changed or reduced. Those who give the highest amounts are the most likely to acknowledge that benefits are critical to them and they would reduce their donation amounts if benefits were modified or eliminated.

Benefits More Important for Higher Level Donors

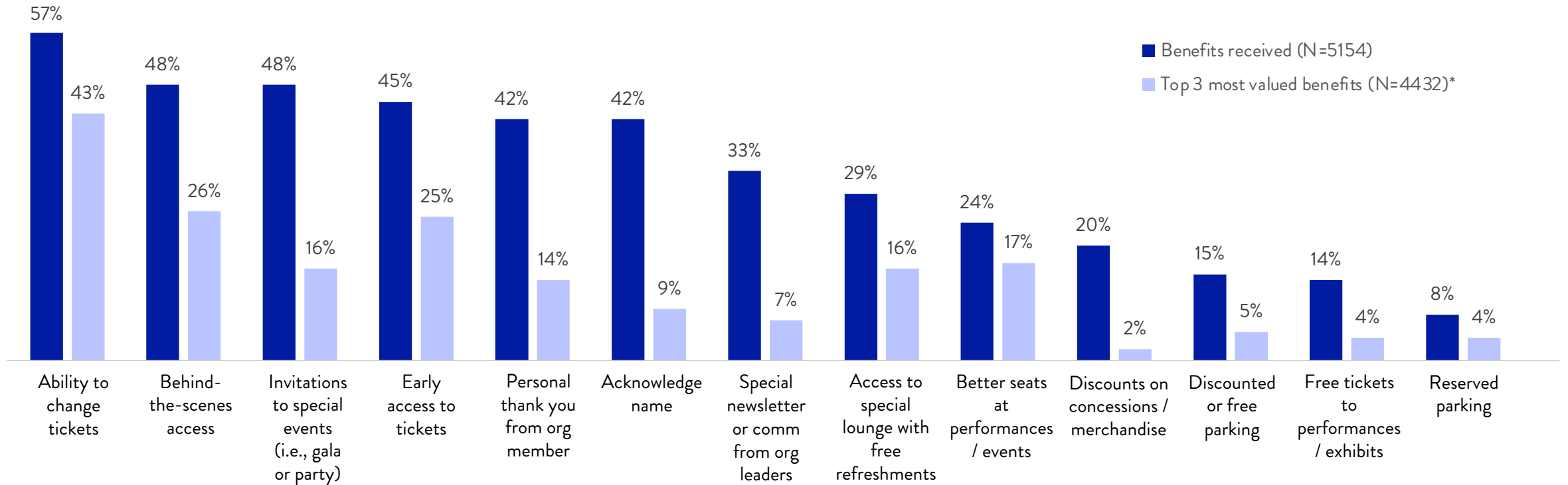
Importance of Benefits On Giving Decision, by Donation Level
Total Giving 2018-2020



"How important are these benefits or rewards to your decision to donate the amount of money you do to [PIPE IN ARTS ORG]?"

Ticket and Behind-the-Scenes Benefits Most Valued

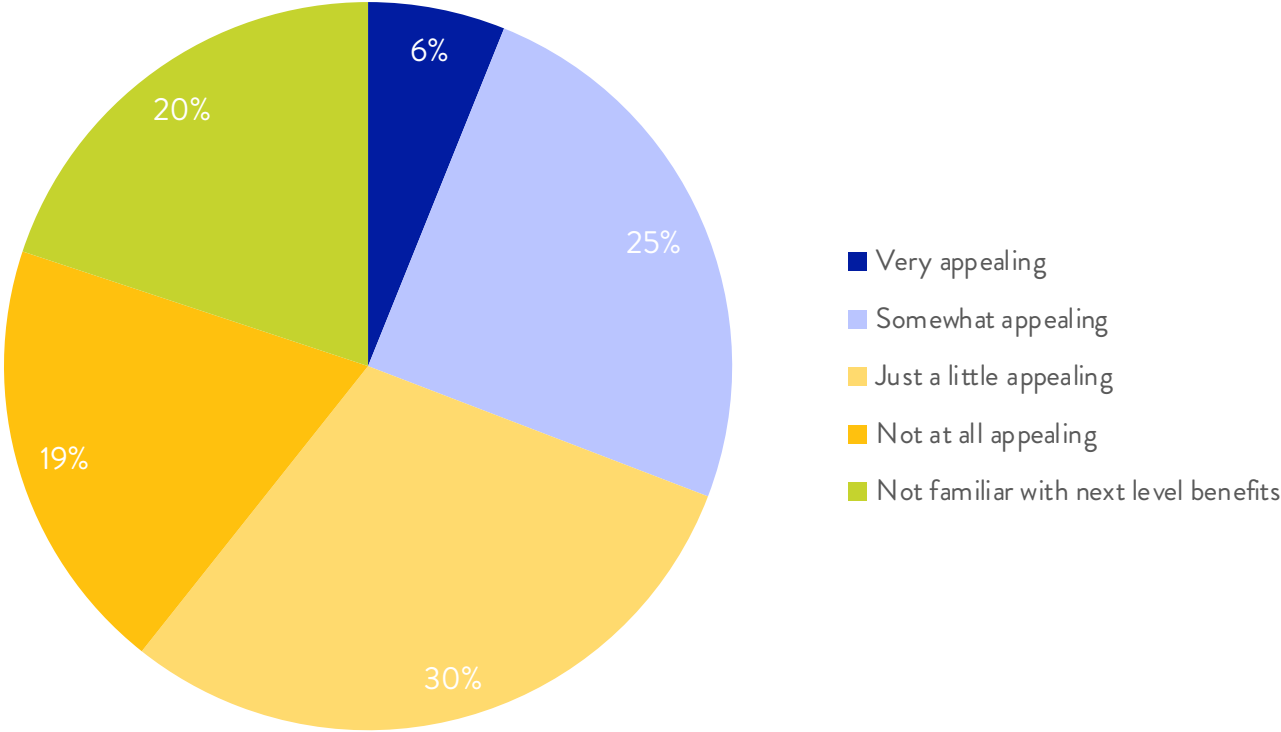
Benefits Received v. Most Valued Benefits from the Arts Org



*Note: 5% of donors answered that they receive no benefits and 9% answered that they don't know what benefits they receive so did not answer this question.
 "As you may know, most arts organizations like [PIPE IN ARTS ORG] offer certain benefits or rewards to their donors to show their gratitude. Which of the following do you receive as a result of your donation to [PIPE IN ARTS ORG]? Please select all that apply."
 "And which of these benefits or rewards from [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

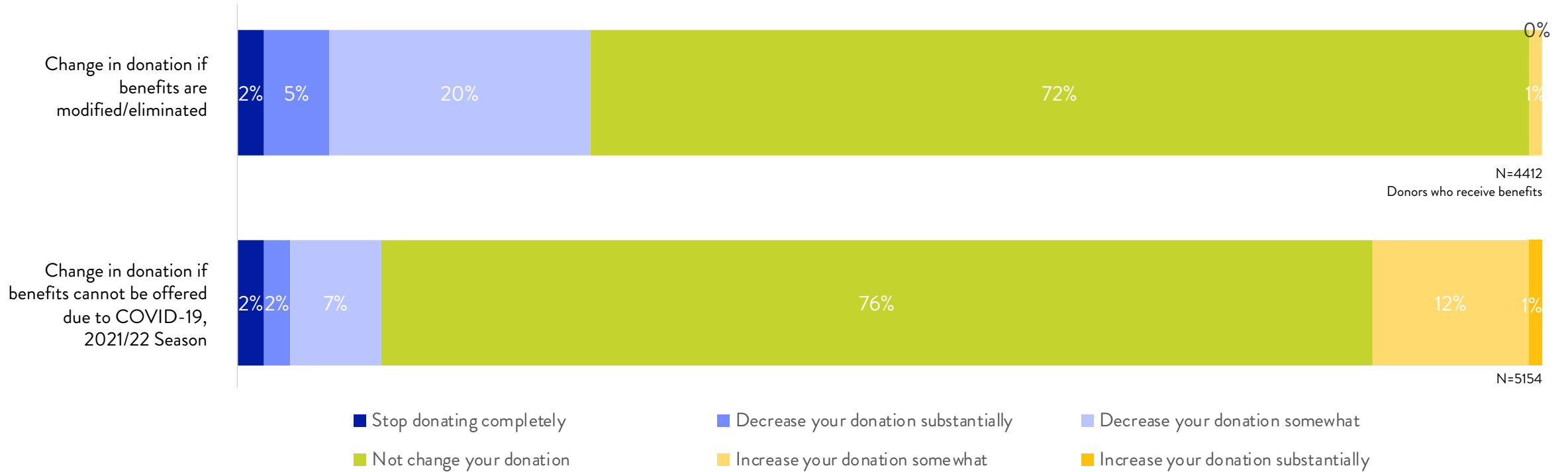


N=4412

"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)?"

Donors Are Understanding, Especially of COVID-19

Anticipated Change in Donation if Benefits Are Modified

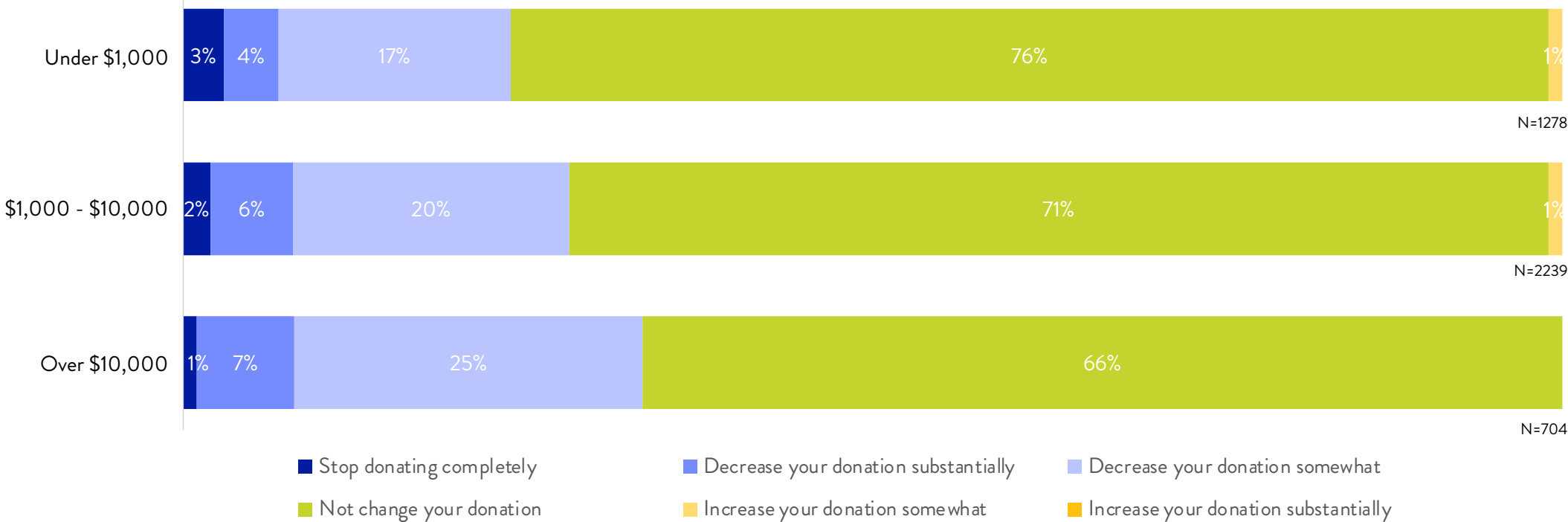


“If [PIPE IN ARTS ORG] modified or eliminated the benefits or rewards you most value, would you:”
“While there are positive signs that we may be emerging from the worst parts of the coronavirus pandemic, suppose [PIPE IN ARTS ORG] were unable to fully open or offer a full season in 2021 and, for a second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

Highest Level Donors Most Likely To Decrease Donation with Benefits Change



Change in Donation If Most Valued Benefits are Modified/Eliminated, by Donation Level
Total Giving 2018-2020



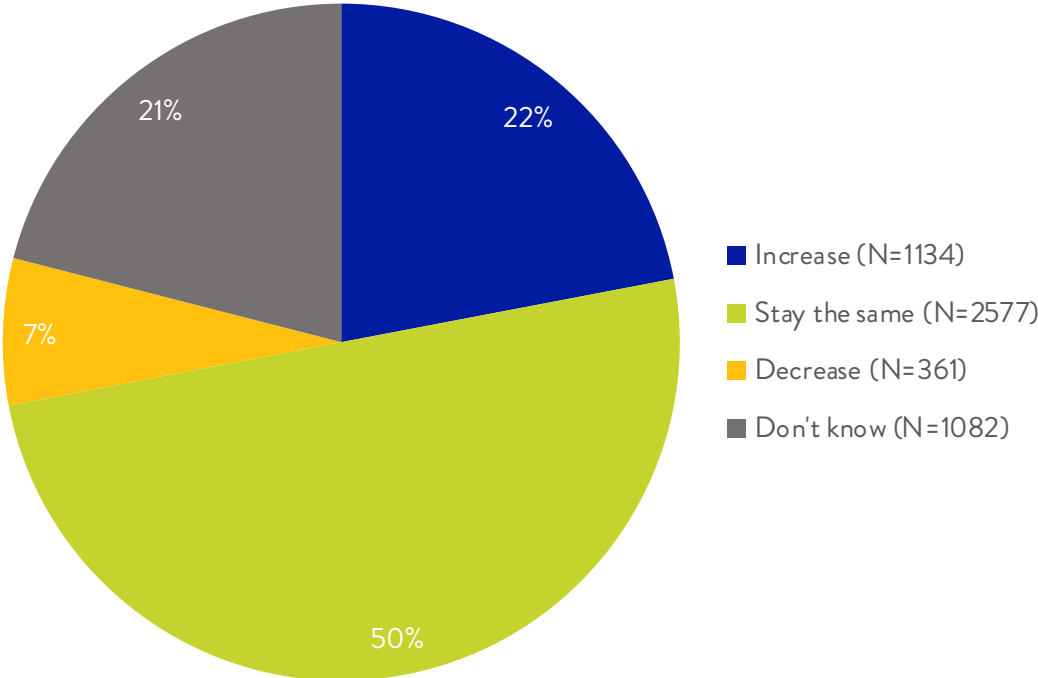
"If [PIPE IN ARTS ORG] modified or eliminated the benefits or rewards you most value, would you:"

VI. Drivers of Donation Change

Approximately one-fifth of arts donors 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. The survey also examines the reasons for actual past donation increases to any non-profit to understand true drivers of change.

Most Planning to Increase or Maintain Giving to Arts Org

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

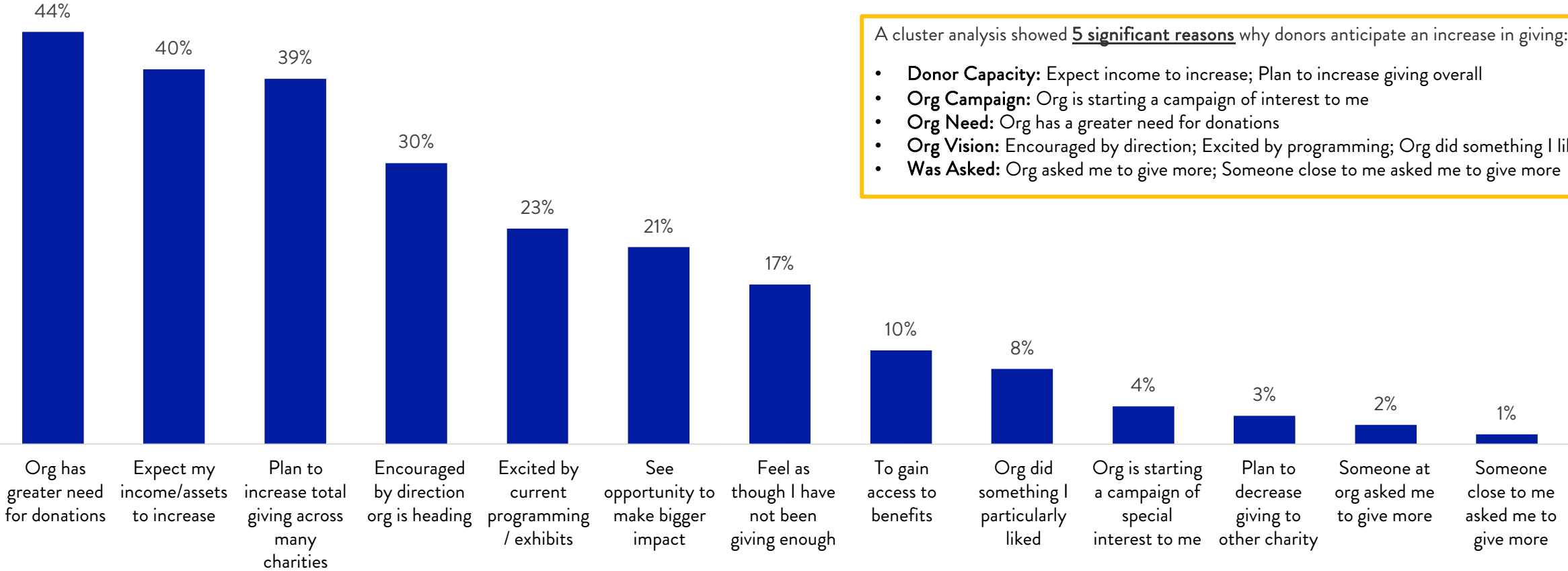


N=4412

“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

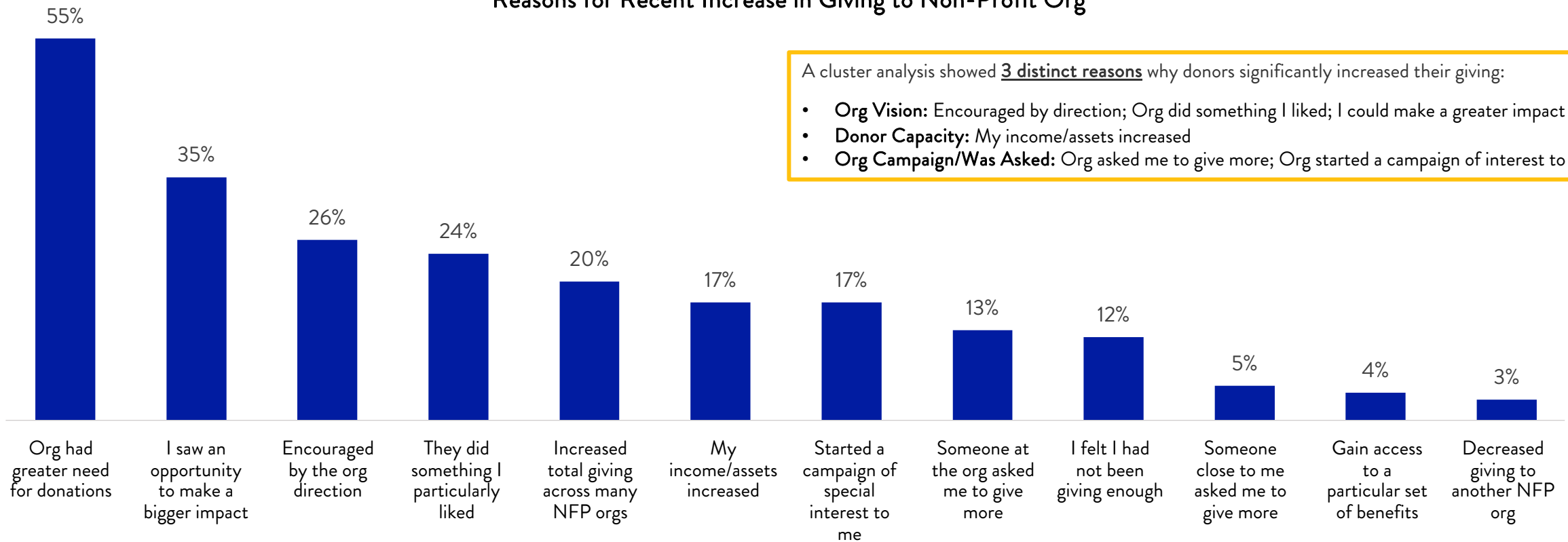
N=1134

“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.”

Increased Giving to a NFP Org Driven by Three Reasons

To better understand the drivers of increased giving ABA asked arts donors if they had significantly increased (by at least 25%) their donation to any non-profit or charity in the last 3 years. Forty-two percent (42%) said they had and were asked a series of follow-up questions.

Reasons for Recent Increase in Giving to Non-Profit Org



A cluster analysis showed **3 distinct reasons** why donors significantly increased their giving:

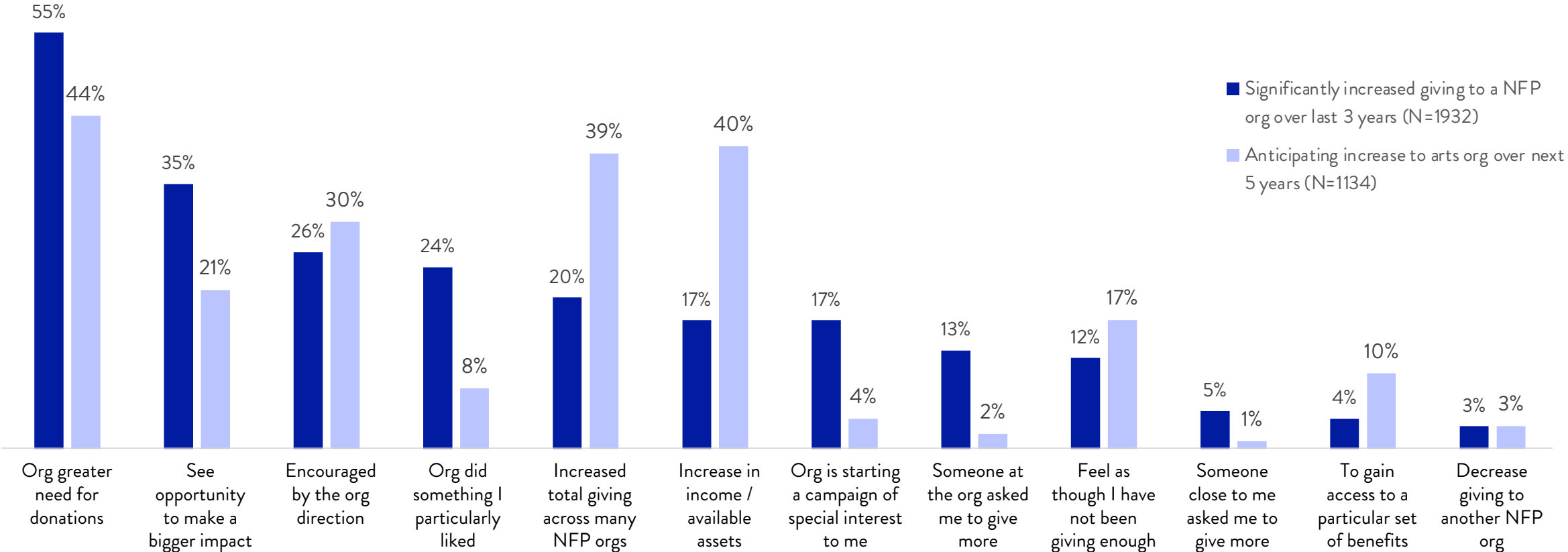
- **Org Vision:** Encouraged by direction; Org did something I liked; I could make a greater impact
- **Donor Capacity:** My income/assets increased
- **Org Campaign/Was Asked:** Org asked me to give more; Org started a campaign of interest to me

N=1932

“Which of the following impacted your decision to increase your donation to this non-profit organization? Please select all that apply.”

Actual Increase vs. Anticipated Increase Yields Different Motivations

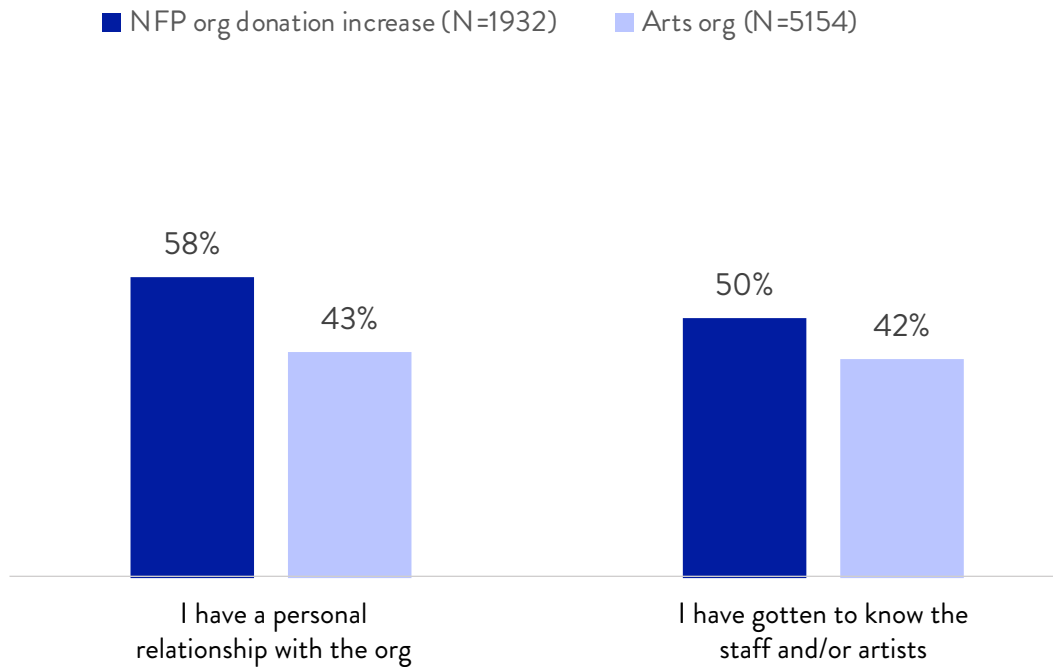
Reasons for Actually Increasing Giving to a NFP Org v. Anticipated Reasons for Increasing Giving to Arts Org



“Which of the following impacted your decision to increase your donation to this non-profit organization? Please select all that apply.”
 “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.”

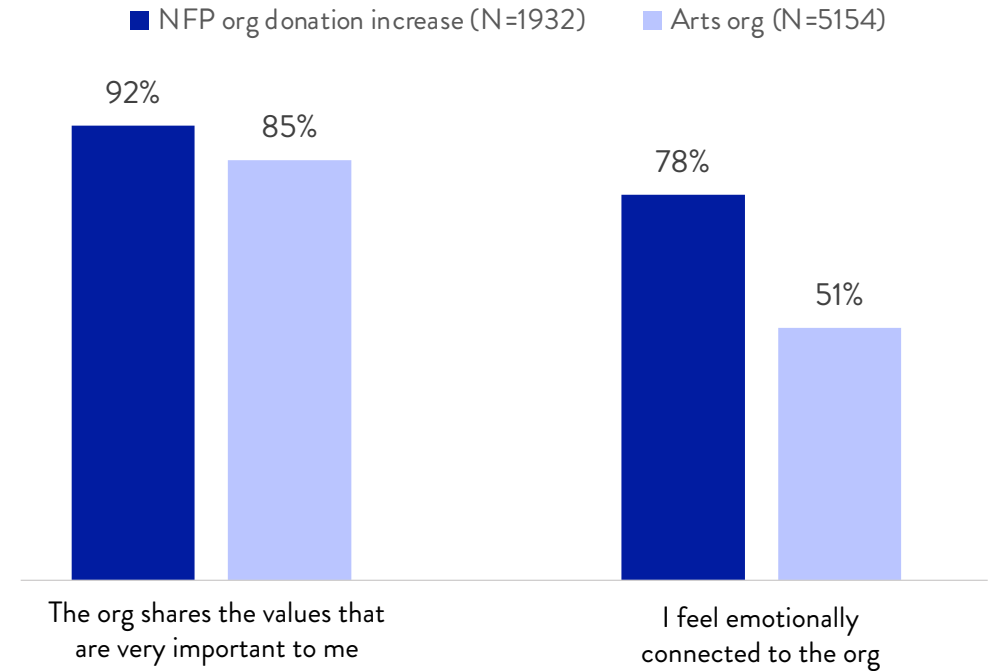
Relationships, Shared Values, & Emotional Connection Key to Donation Increase

Connection to the NFP Org to which Donation Increased v. Arts Organization
(Top 2 Choices, Strongly Agree + Somewhat Agree)



“Below are a number of statements about your connection with [PIPE IN ARTS ORG]/this non-profit organization to which you increased your giving. Please indicate if you agree or disagree with each one.”

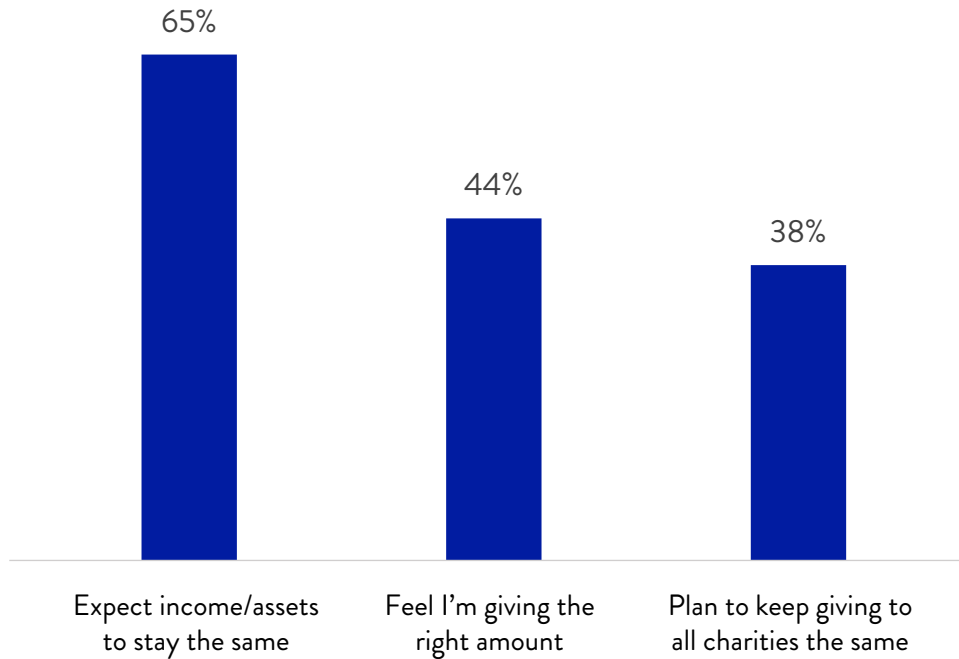
Belief About the NFP Org to which Donation Increased v. Arts Organization
(Top 2 Choices, Strongly Agree + Somewhat Agree)



“Below are a number of statements that may or may not apply to [PIPE IN ARTS ORG]/the non-profit organization to which you increased your giving. Please indicate if you agree or disagree with each one.”

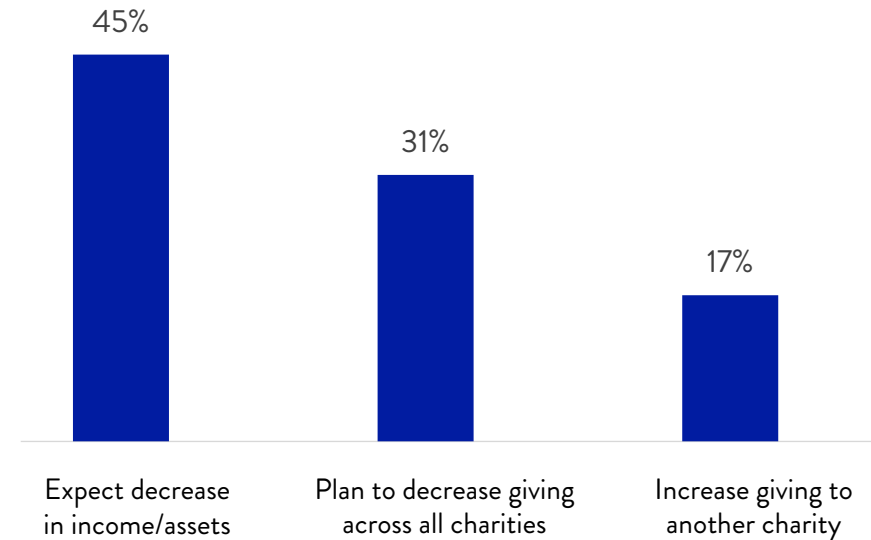
Donor Capacity Most Cited Reason for Donation Stasis or Decrease

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



N=2577
"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."

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



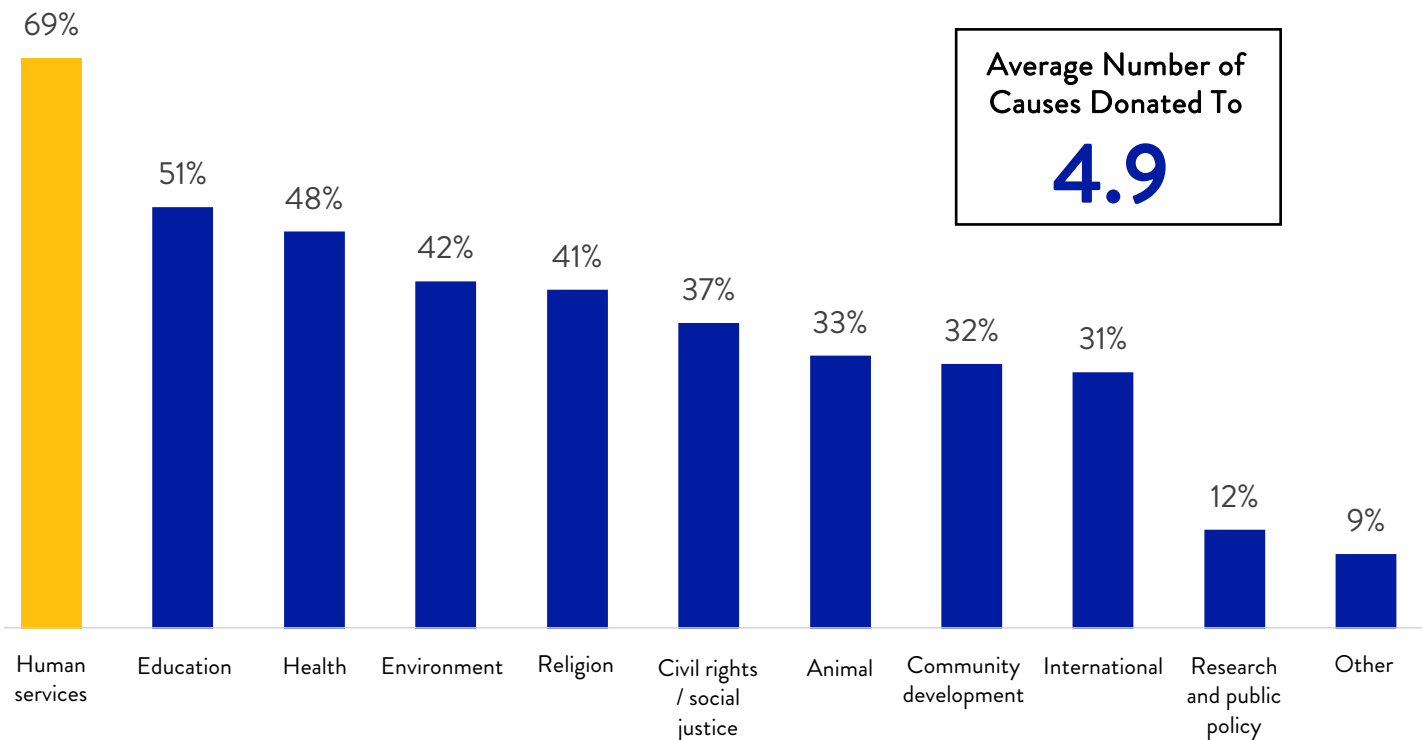
N=361
"For which of the following reasons are you planning to decrease the amount you give to [PIPE IN ARTS ORG]?
Please select all that apply."

VII. Overall Donation Strategy

Arts donors also give to many other charities and non-profits – most commonly those providing 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.

Donors Have a Vast Giving Profile & Plan to Maintain It

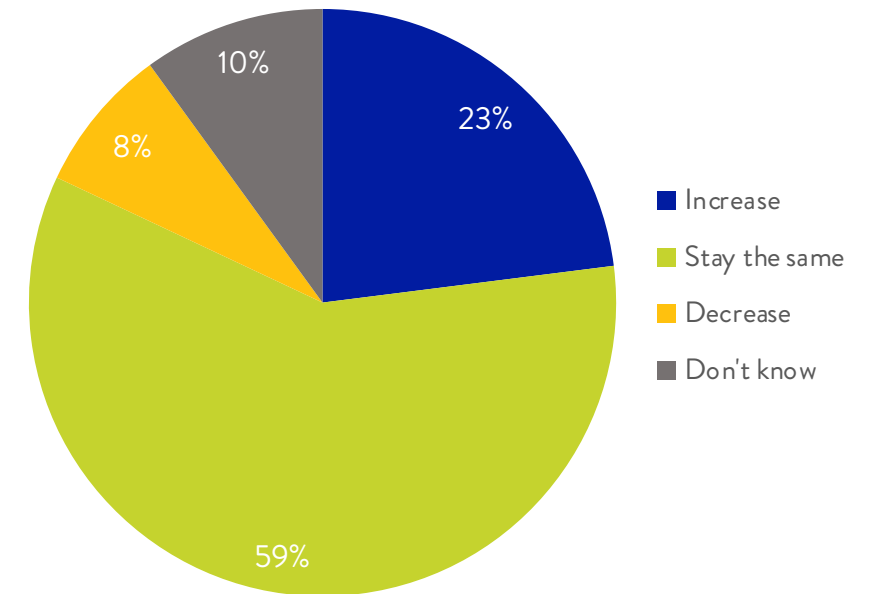
Other Types of NFP Orgs Donated to in Past 3 Years



N= 5154

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

Plan for Giving Amount in 2021 to All NFP Orgs

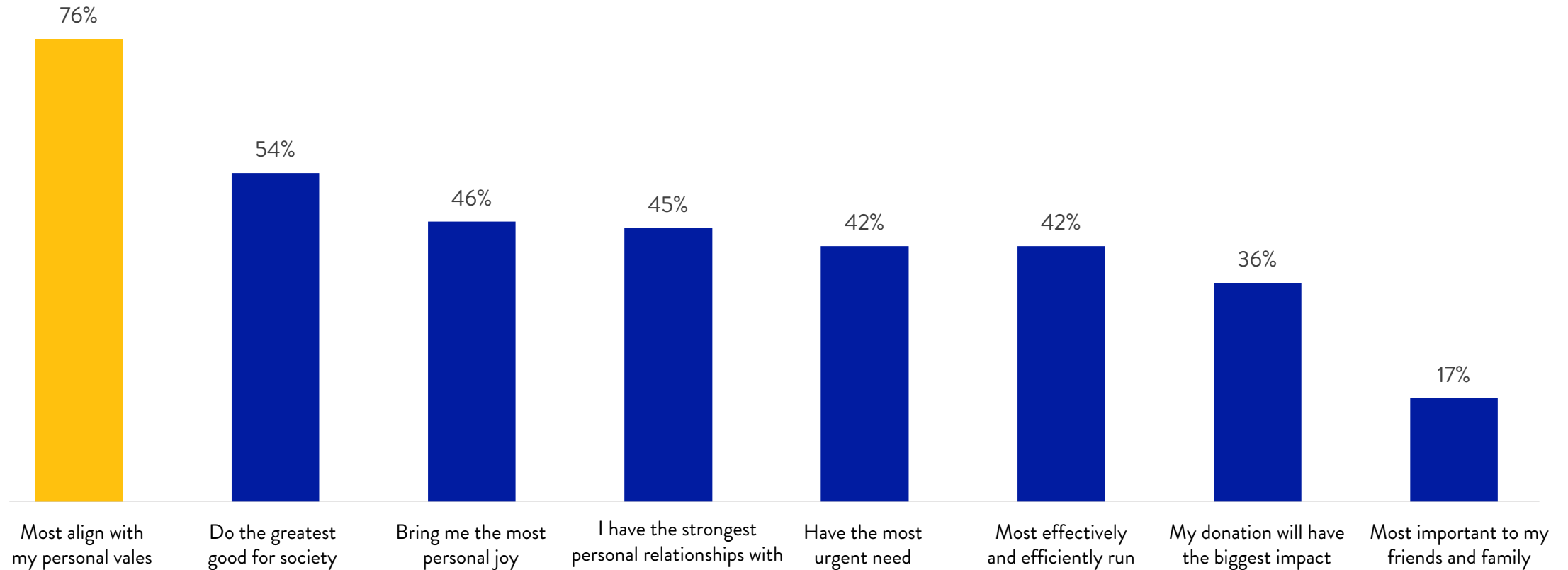


N= 5154

"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

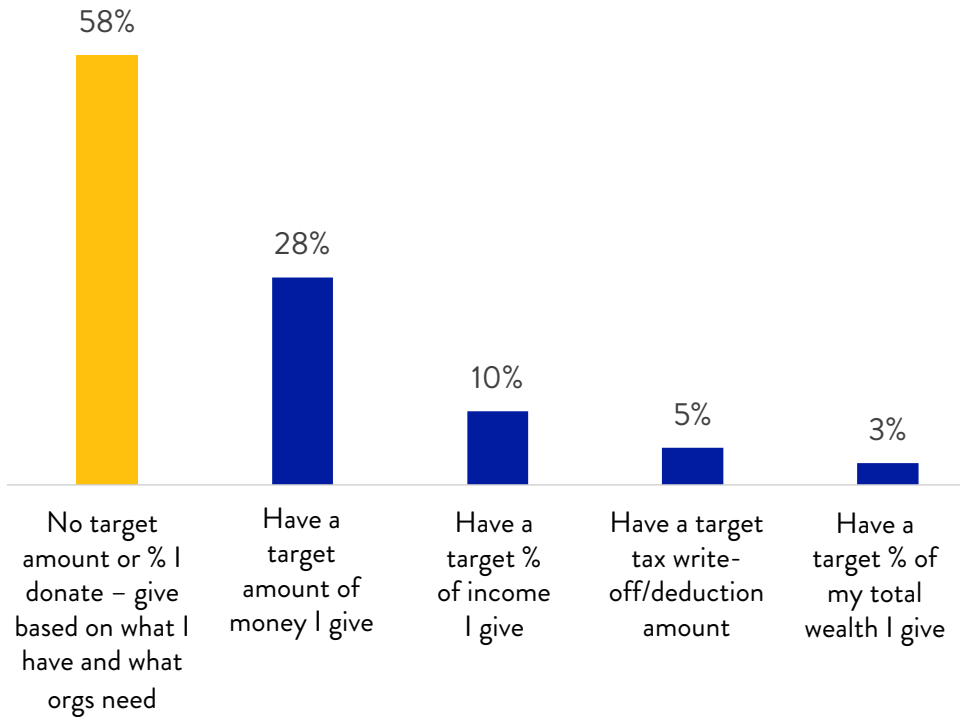


N= 5154

"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..."

Donors Rely on Gut and Routine

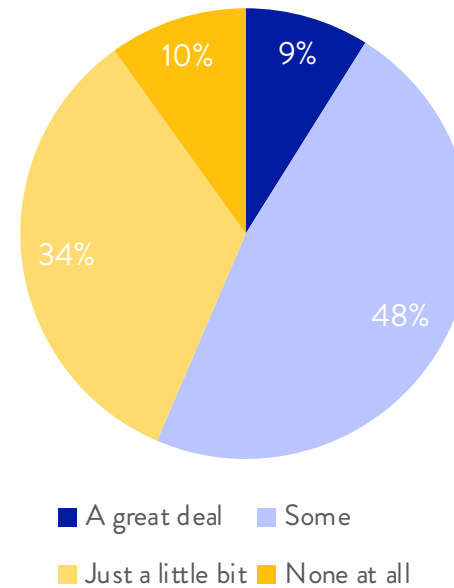
Donors' Overall Donation Strategy



N=5154

“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.”

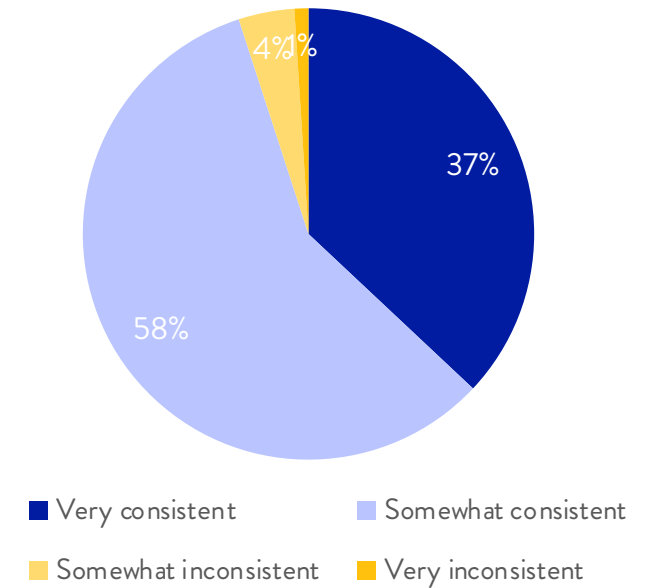
Time Spent Planning Donations Each Year



N=5154

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

Consistency of Orgs Donated to Each Year

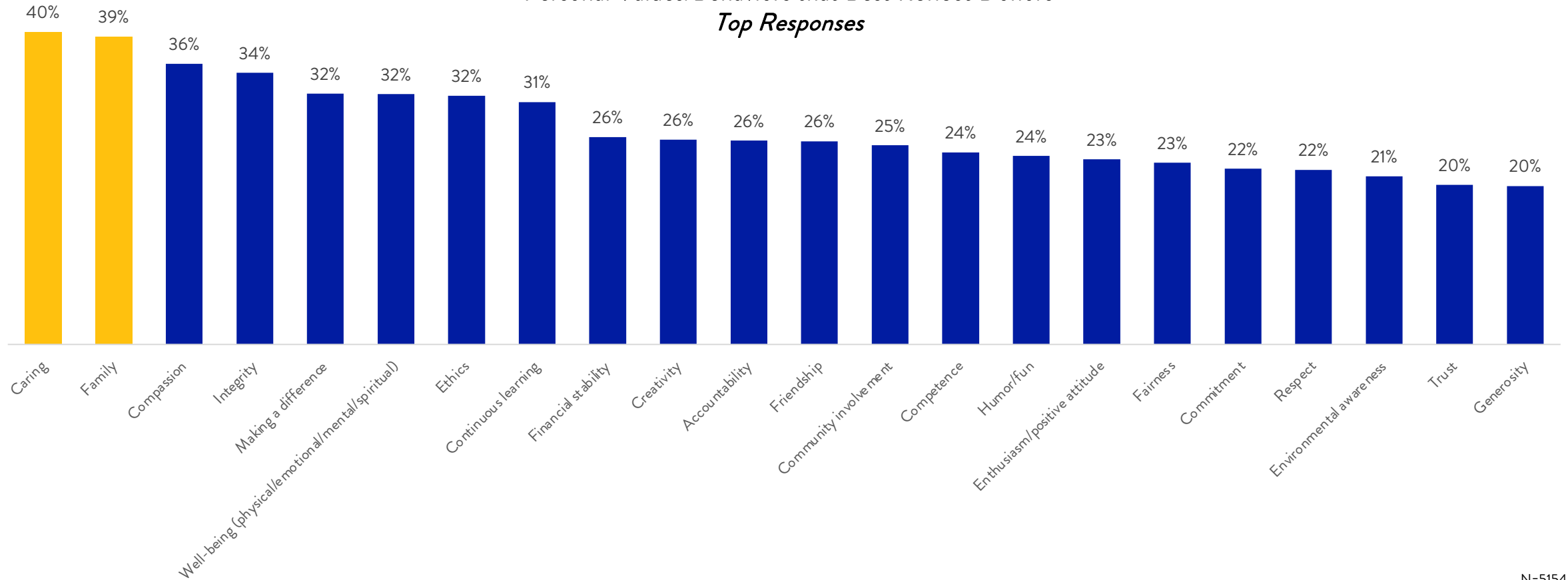


N=5154

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

Donors Value Care and Family Above All Else

Personal Values/Behaviors that Best Reflect Donors
Top Responses



N=5154
 “This question asks about your personal values, so we can understand more about what matters to people who donate to the arts Please select **up to 10** of the following values/behaviors that most reflect who you are, not who you desire to become.”
 Donors selected up to 10 values from a list of 66 choices. Values selected by at least 20% of respondents are shown here.

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
-  Strategy Facilitation

IMPLEMENTATION TOOLS & SERVICES

-  Implementation Guides & Toolkits
-  Interactive Workshops
-  Diagnostic Tools

Signature Research Initiatives:



ABA Members: A Global Network at the Ready

