

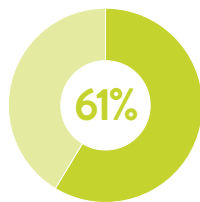
NOVEMBER 30, 2021

The Advisory Board for the Arts regularly surveys leaders at arts organizations — including operas, ballets, symphonies, festivals, theaters, venues, schools, advocacy organizations, and museums — about issues relevant to the arts world. This online survey was fielded **November 18–24, 2021**. This is the fortieth survey of the series and was designed to help arts leaders benchmark the state of fundraising efforts and sources of contributed income in this season of reopening.

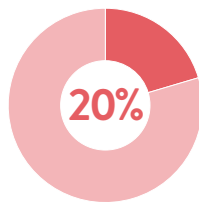
## OVERALL GIVING

### Over Half See an Increase in Overall Contributed Income This Year

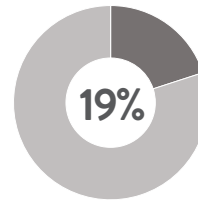
Overall Contributed Income This Fiscal Year/Calendar Year vs. Last Year



Increase in overall contributed income



Decrease in overall contributed income



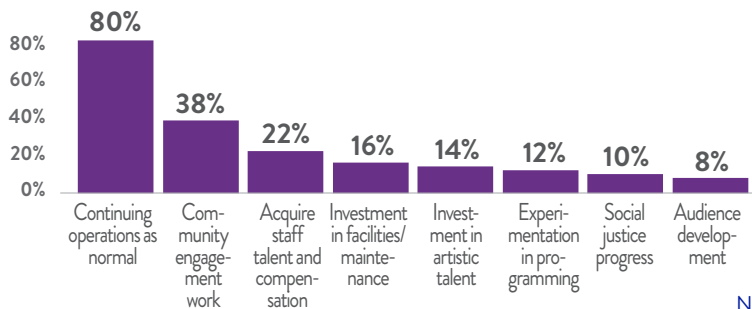
No change in overall contributed income

N=59

## GOVERNMENT

### Majority of Government Funding Goes Towards General Operations

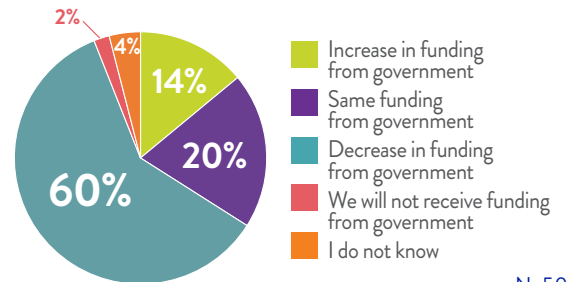
Top Two Areas of Investment Enabled by Additional Government Funds



N=50

### 80% Do Not Anticipate Increased Funding from the Government

Change in Government Funding Over the Next 3 Years as Part of Overall Giving Portfolio



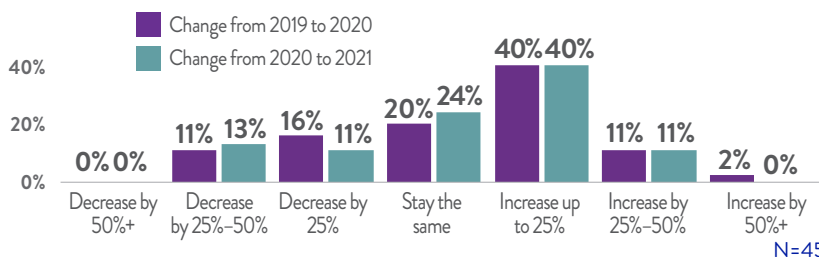
N=50

Answers account for local, state, and federal government funding in aggregate, including both pandemic-specific funding (i.e. PPP loans, SVOG grants) and arts agency funding (i.e. NEA).

## INDIVIDUAL DONORS

### Consistent Trend of Slight Increase in Individual Donors Across the Last 2 Years

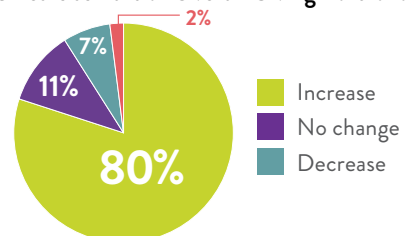
Change in Individual Donor Giving Across 2019–2021



N=45

### Majority Anticipate Even More Increase in Individual Donor Giving In the Near Future

Change in Individual Donor Giving Over the Next 3 Years as Part of Overall Giving Portfolio



N=46

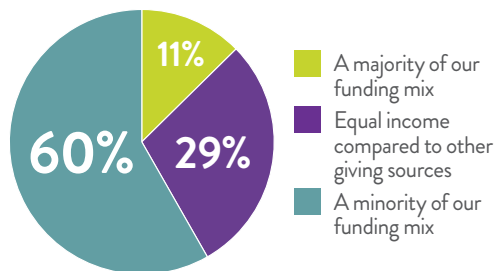
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## FOUNDATIONS & GRANTING INSTITUTIONS (F&GIS)

### F&GI Giving Typically is an Equal or Minor Source of Overall Fundraising

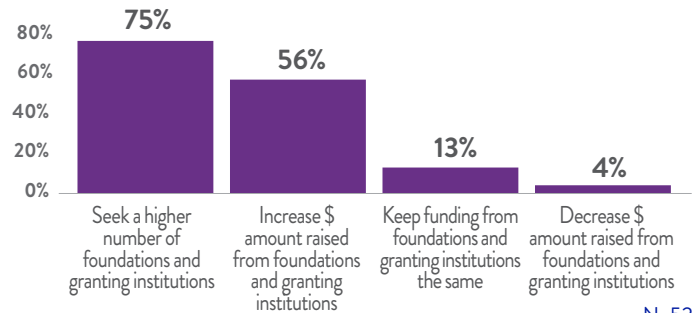
Average Historical Role F&GIs Have Played in Organizations' Fundraising Portfolios



N=52

### Arts Leaders Agree to Increasing Their Activity with F&GIs in the Near Future

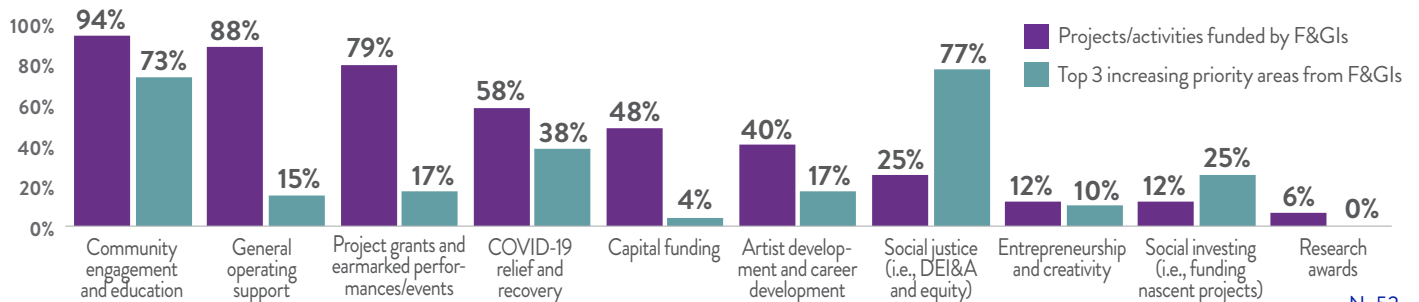
Change in F&GI Giving Over the Next 3 Years as Part of Overall Giving Portfolio



N=52

### Most F&GI Gifts Fund Community Work and General Operations Increasing Priority in Social Justice from F&GIs

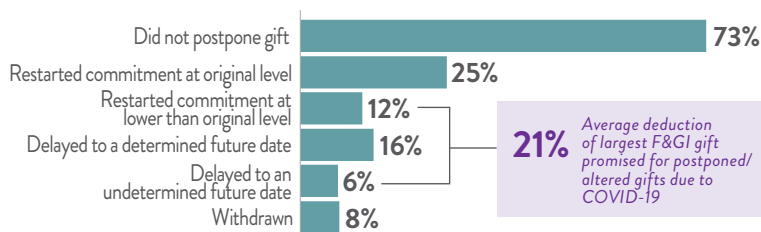
Historical Projects and Activities Funded by F&GIs; Top 3 Increasing Priority Areas From F&GIs



N=52

### A Handful Experienced a Postponement/Alteration of F&GI Gifts, 21% Avg. Deduction of Original Gift

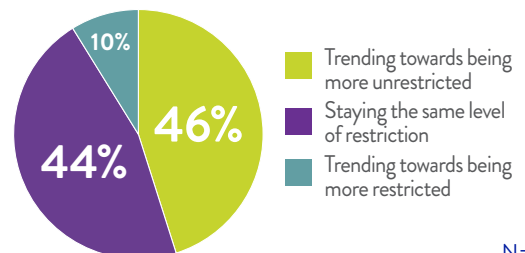
State of F&GI Gifts Today and Percentage of Original Gift Deducted for Postponed/Altered Gifts



N=51

### About Half Are Experiencing Less Restriction from F&GI Gifts Due to the Pandemic

Current Level of Funding Restriction from F&GIs Compared to Pre-Pandemic



N=52