



Photo: Metropolitan Opera House, Unsplash



ADVISORY  
BOARD  
for the ARTS

*Transforming Arts Organizations Worldwide*

# Individual Arts Donors Survey - Opera

*Quantitative Genre Report and Analysis*

*July 2021*

# Report Table of Contents

- I. Study Approach & Respondent Profile..... 3
- II. Arts Donor Motivations..... 7
- III. Arts Organization Connections..... 12
- IV. Reactions to Arts Organization DEI&A Stance..... 21
- V. The Impact of Benefits..... 23
- VI. Drivers of Donation Change..... 28
- VII. Overall Donation Strategy..... 32

# 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, **including 1329 individuals who donated to an opera**. 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

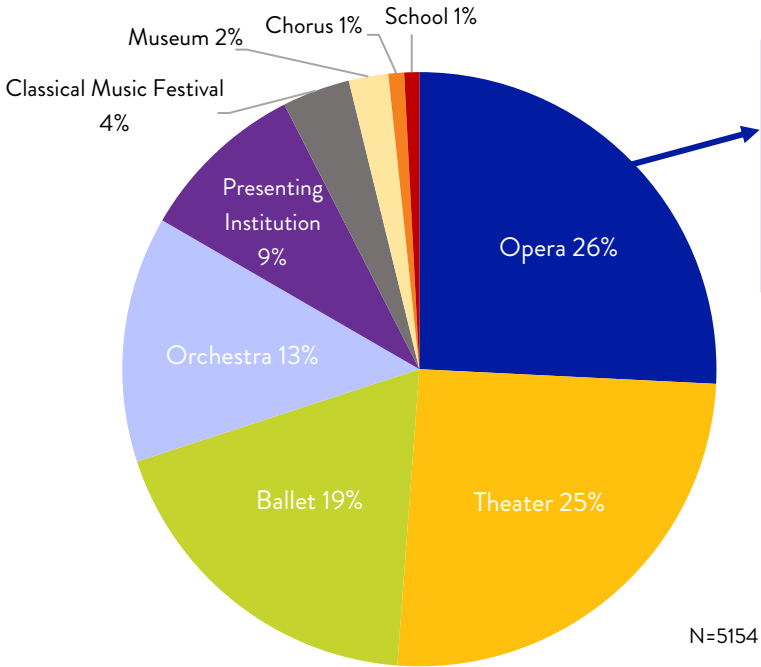
- Fairness
- Compassion
- Respect
- Making a difference
- Balance
- Gender
- Ethnicity
- Presence of children
- Employment status
- Income & assets

This report focuses on opera donors. It is one of a series of genre-specific reports comparing donors from each genre to arts donors overall. *It is important to note that the reduced sample size of genre respondents means that small differences in answer percentages are often not statistically meaningful. Please draw conclusions about differences with care.*

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

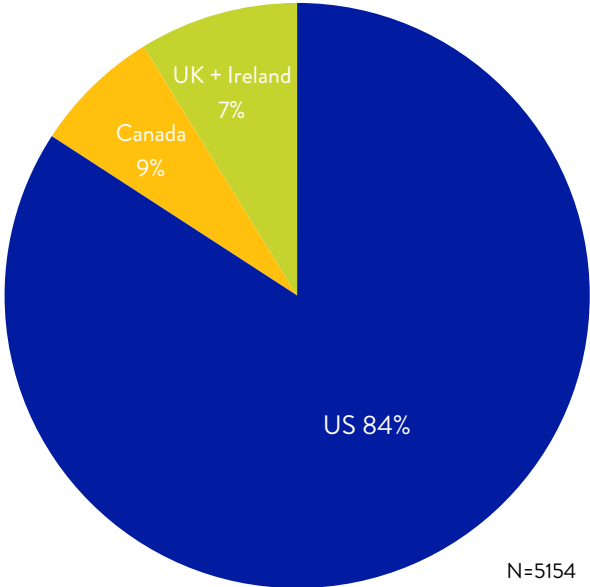
# Overall Respondent Genre and Region Distributions

Genre of Org Donated to



This report specifically examines the **1329** respondents who donated to an **opera**. 12 operas are included in this sample.

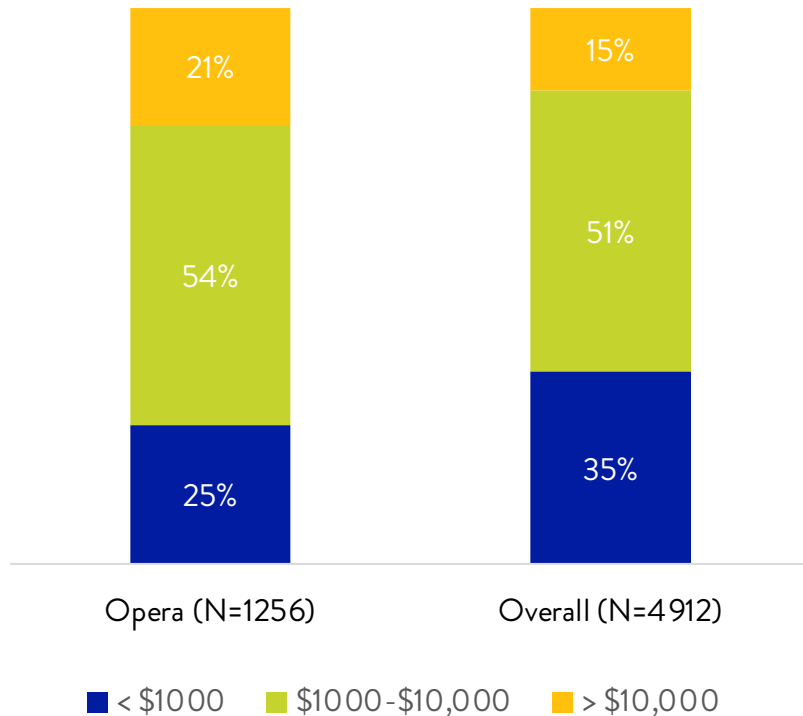
Region



Opera Distribution (N=1329)	
US	73%
Canada	17%
UK	10%

# Average Giving to Operas

Distribution by Average Giving, Opera Donors vs. Overall  
*Cumulative Amount in US Dollar Equivalent, 2018-2020*



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



Overall average annual giving: \$5,135  
 Overall average other giving: \$2,549  
 Overall average total giving: \$7,684

*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

### **Overall Takeaways:**

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.

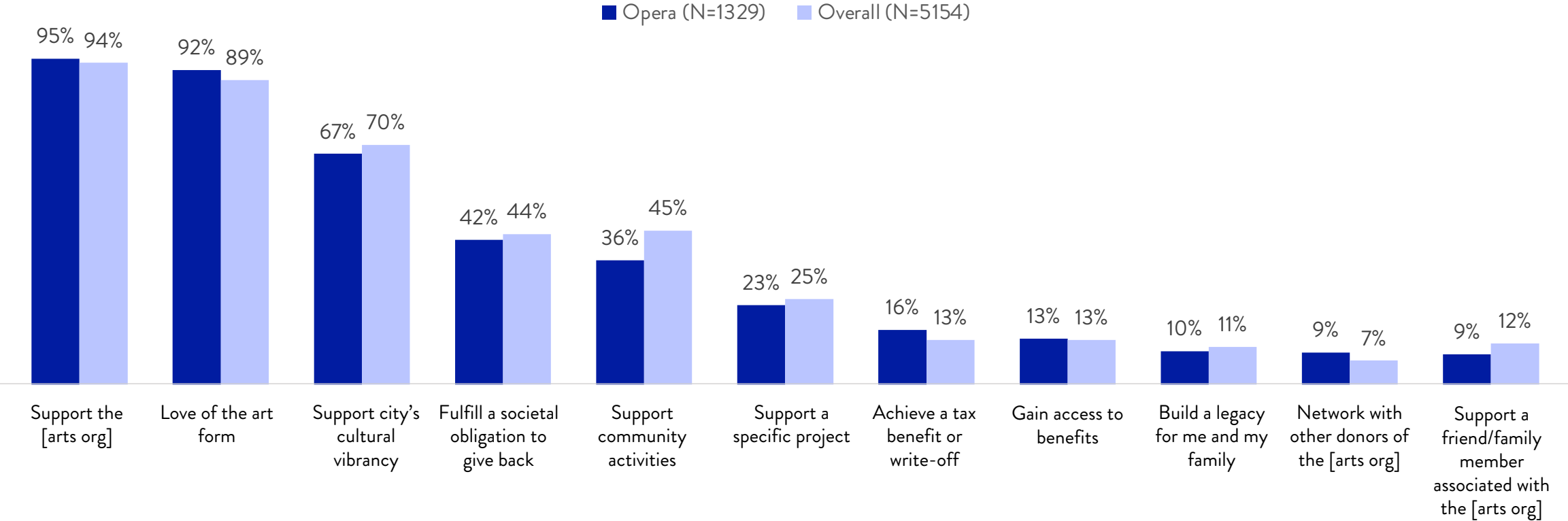
### **Opera Highlights:**

Opera donors are a bit less likely to be Community Donors than Benefits and Arts Lover Donors overall. However, among all opera donors, Community Donors give the most.



# Why Opera Donors Give to the Arts

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



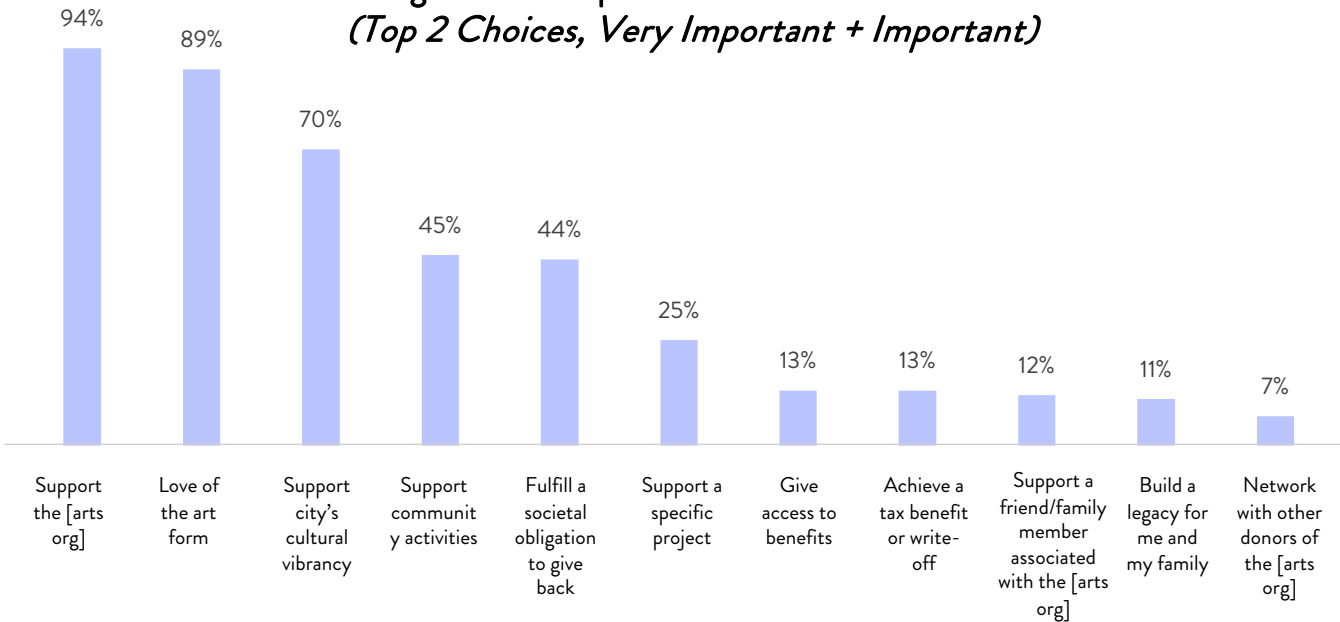
“People donate money for many reasons. For each of the following, please indicate how important that reason was in your decision to donate to [PIPE IN ARTS ORG] in the last three years.”  
Throughout this report, [PIPE IN ARTS ORG] and [arts org] indicate when the name of the arts organization was inserted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



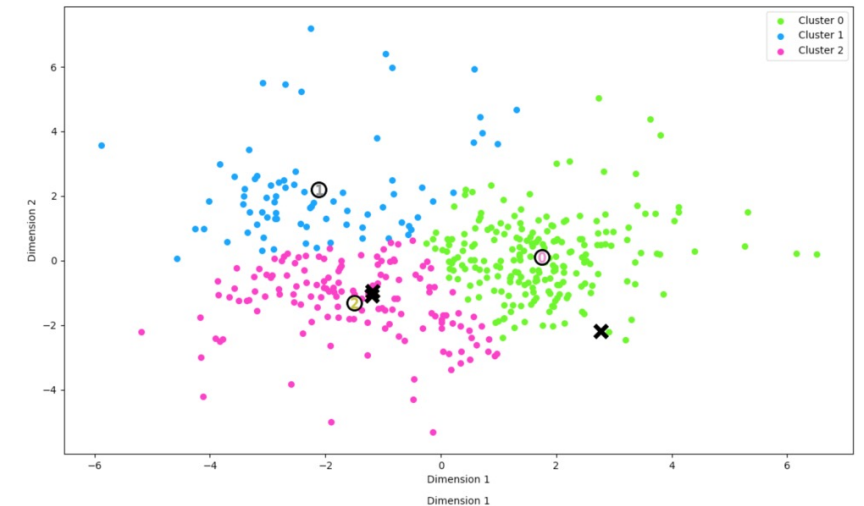
# What Donors Say and How We Untangle What's Important

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)*



**Cluster Analysis Finds Hidden Patterns Across All Survey Respondent Answers**



N=5154

# 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



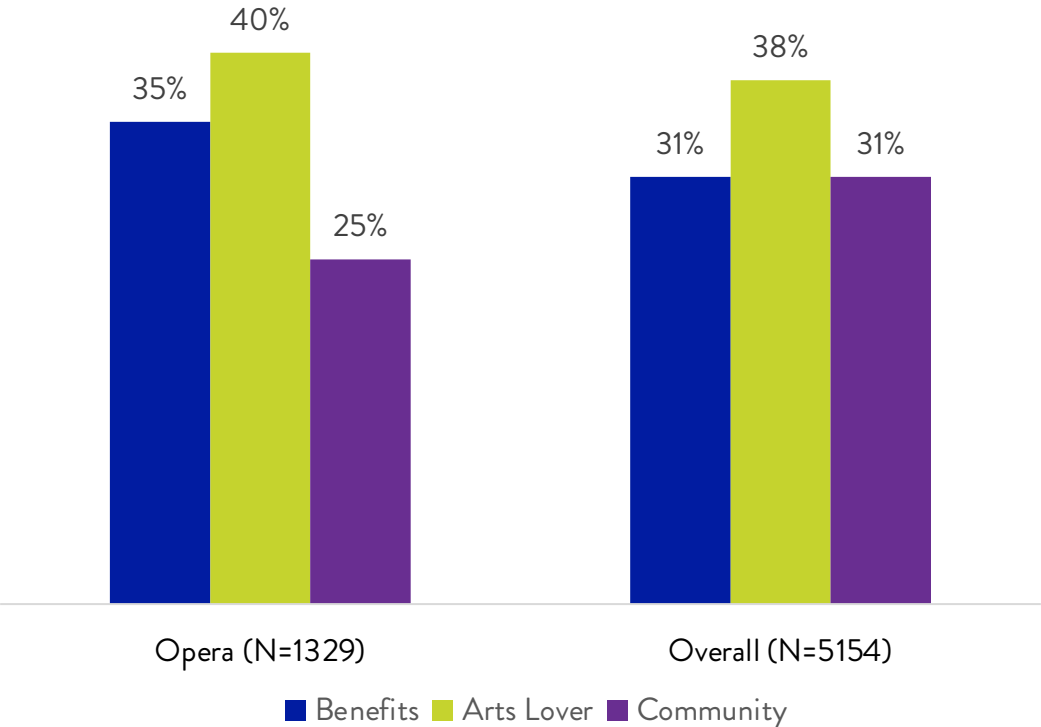
## Community Donors

Primary Motivations:

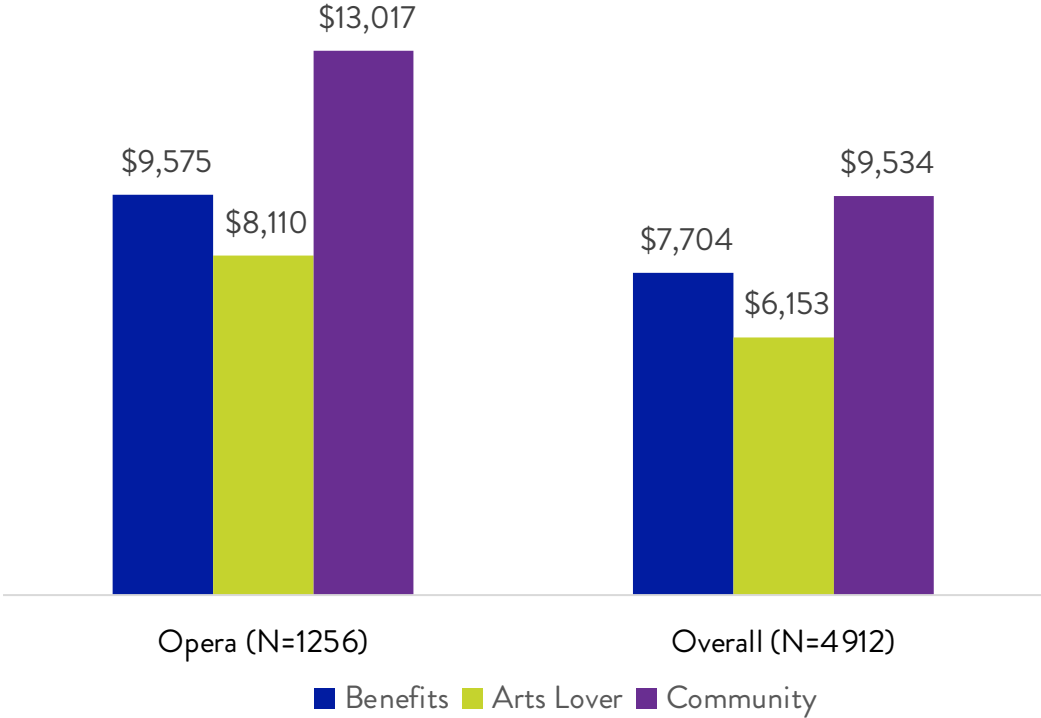
- Support projects
- Support community activities
- Support friends and family
- Build or continue a legacy
- Access network of donors

# Community Donors Smallest Group, But Give the Most

Percent of Donor In Each Segment



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



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

# III. Arts Organization Connections

## **Overall Takeaways:**

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.

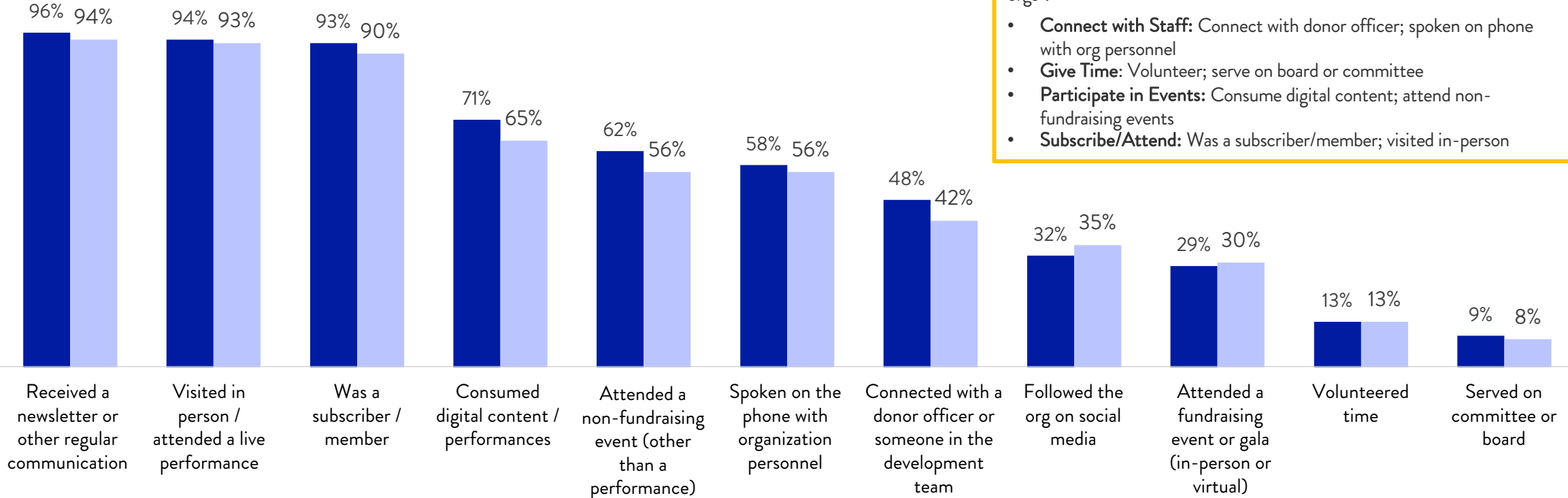
## **Opera Highlights:**

Opera donors are very similar to arts donors overall. They are slightly more likely to have consumed digital content and attended a non-fundraising event.

# Opera Donors Are Very Involved with Arts Orgs

Donor Involvement With Arts Org in the Past 3 Years

■ Opera (N=1329) ■ Overall (N=5154)



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

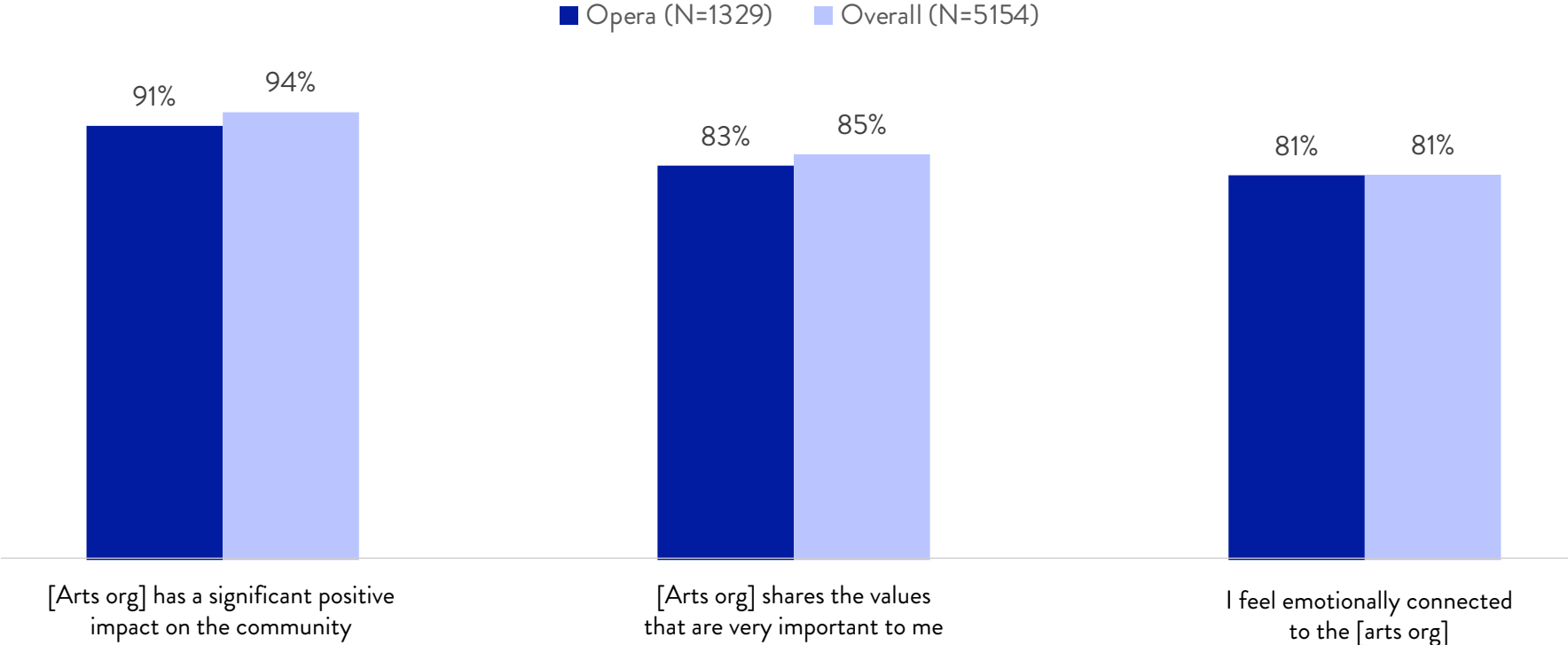
- **Connect with Staff:** Connect with donor officer; spoken on phone with org personnel
- **Give Time:** Volunteer; serve on board or committee
- **Participate in Events:** Consume digital content; attend non-fundraising events
- **Subscribe/Attend:** Was a subscriber/member; visited in-person

\*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."

# Opera Donors Care About More Than Art

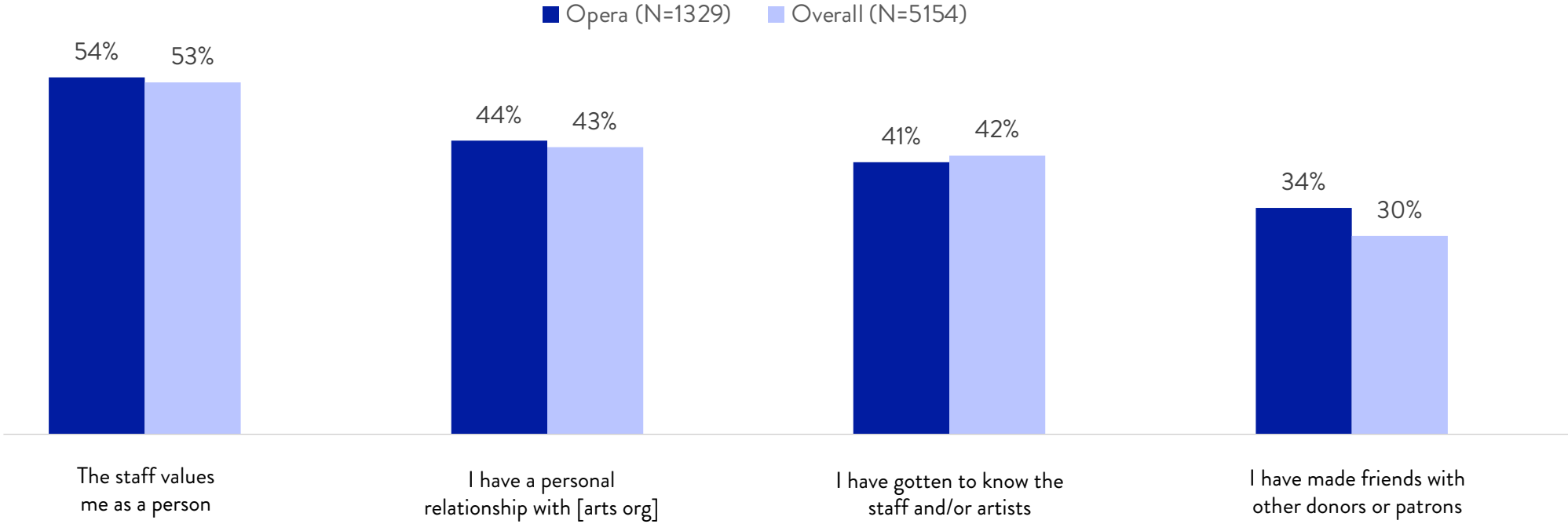
**Beliefs About Arts Organization**  
*(Top 2 Choices, Strongly Agree + Somewhat Agree)*



*"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 Opera Donors

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

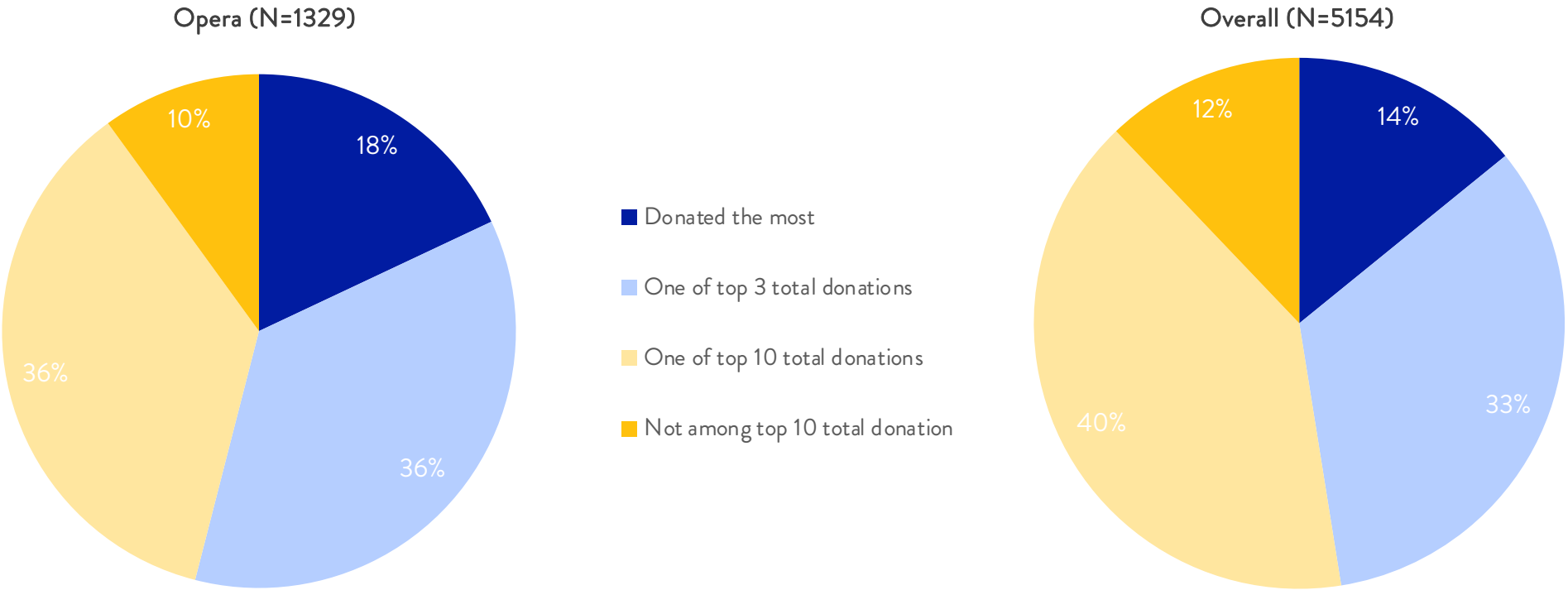


*“Below are a number of statements about your connection with [PIPE IN ARTS ORG]. Please indicate if you agree or disagree with each one.”*



# Operas Often Among Donors' Top 3 Gifts

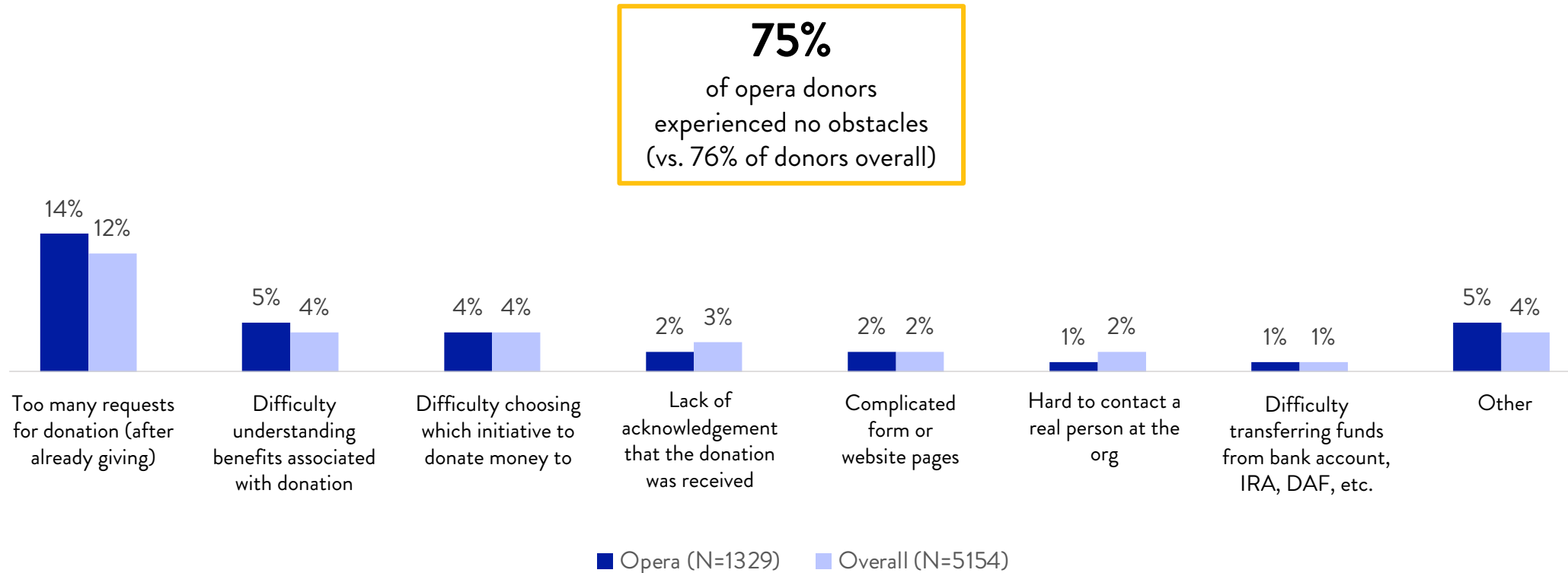
Ranking of Donation Amount to Arts Org in Relation to Total Giving



"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

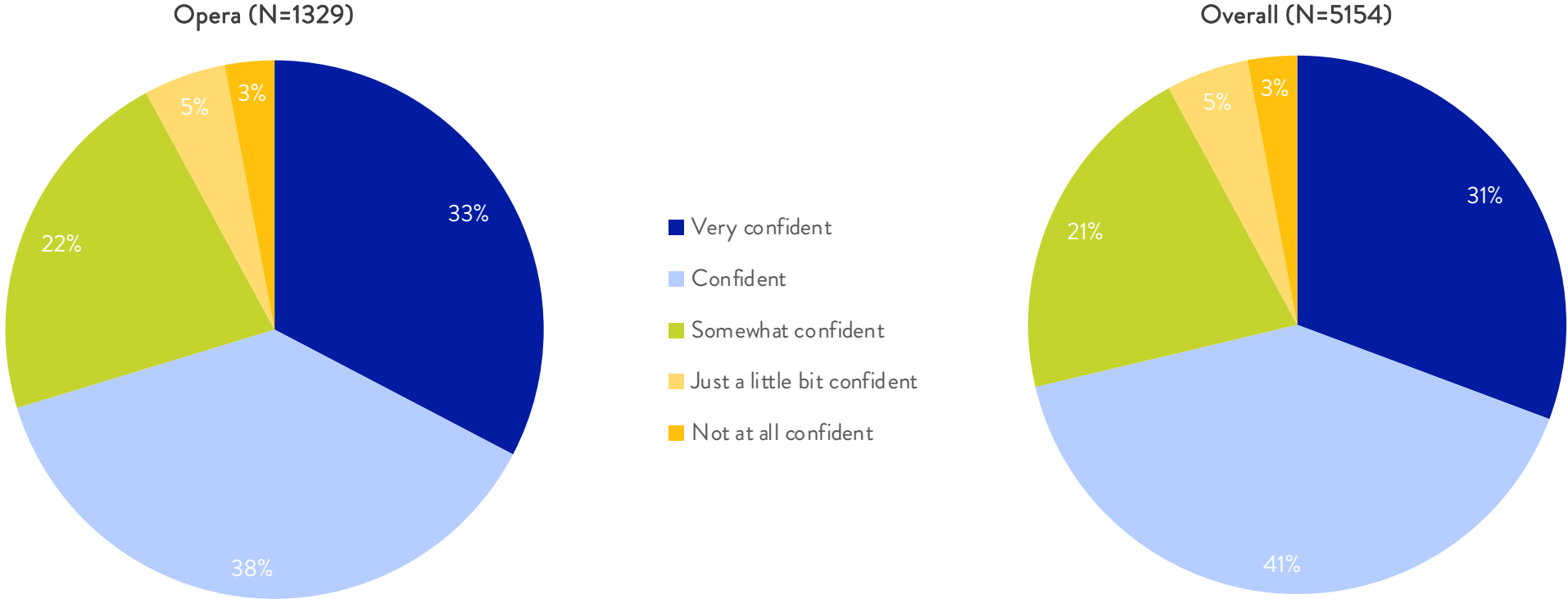
## Challenges Encountered Donating to the Arts Org



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

# Opera Donors Are Confident in “Right Amount”

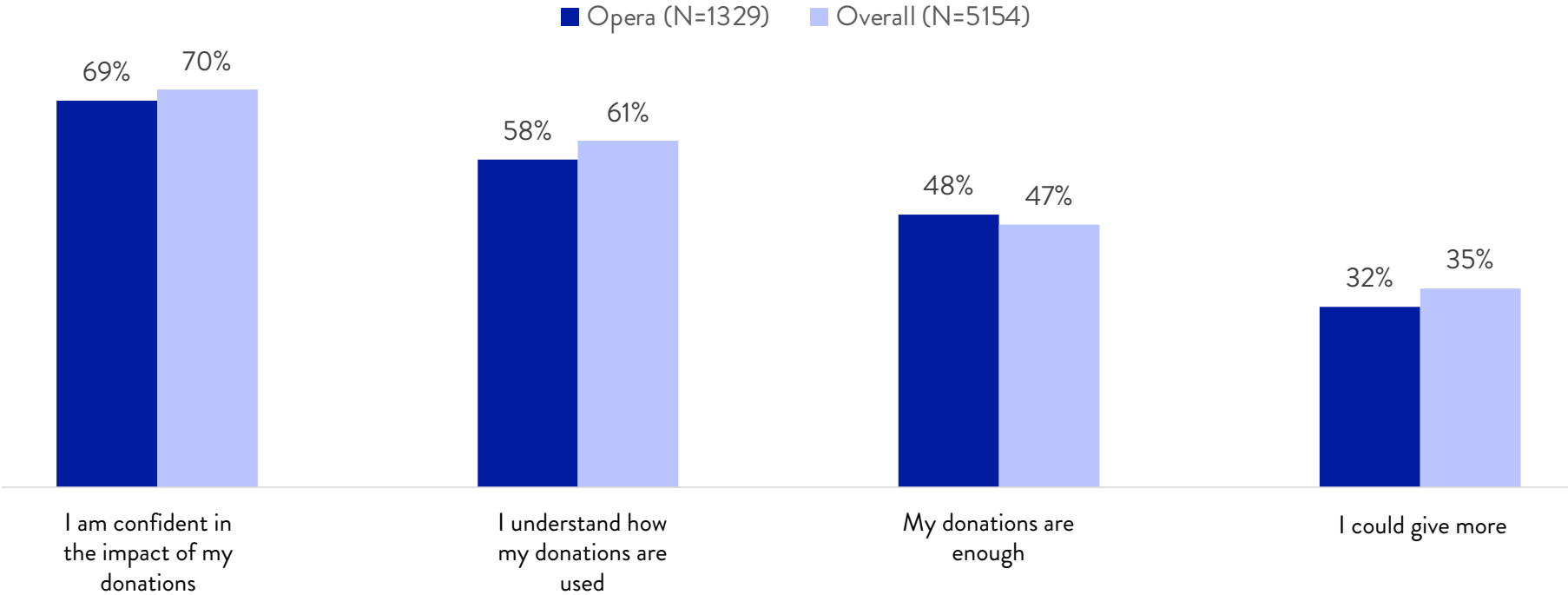
Confidence in Giving the “Right Amount” to Arts Organization



*“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 Opera Donors Understand How Gifts Are Used

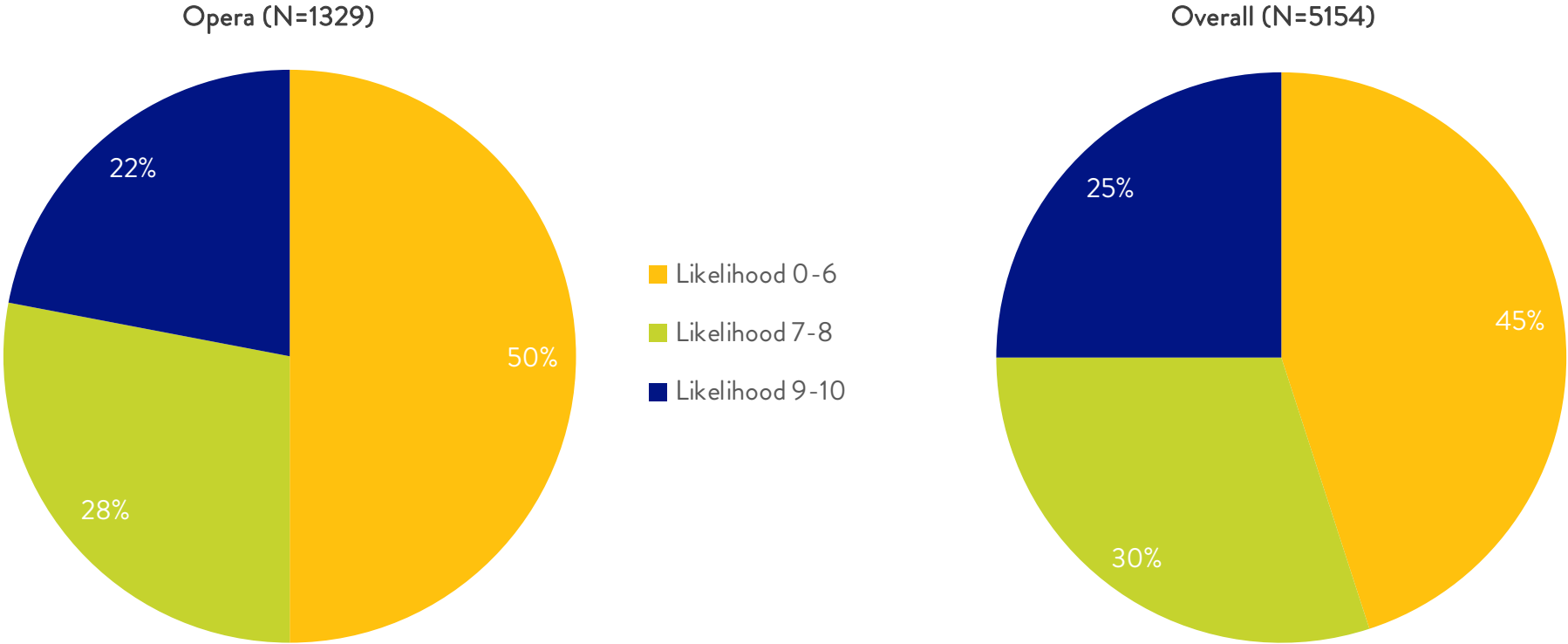
Feelings About Donations to Arts Org  
*(Top 2 Choices, Strongly Agree + Somewhat Agree)*



*“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 Opera 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

## **Overall Takeaways:**

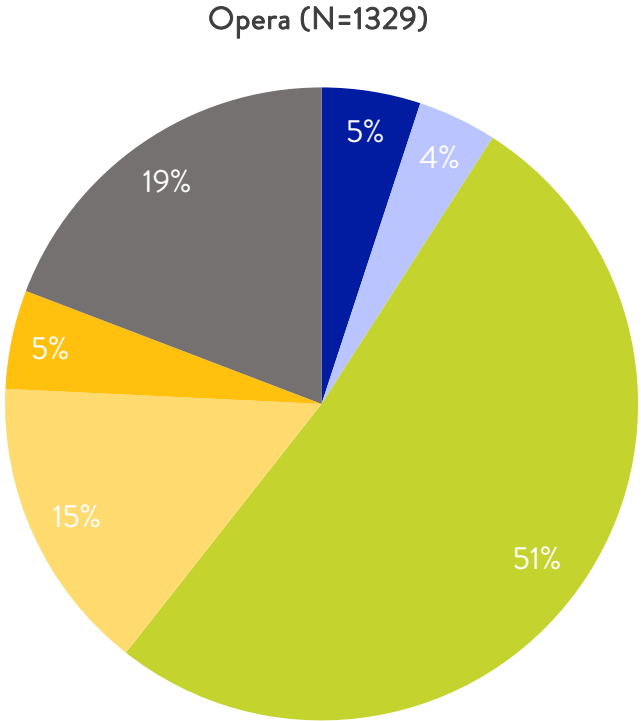
Arts donors are generally satisfied with their organization's stance and actions related to issues of diversity, equity, inclusion, and accessibility (DEI&A).

## **Opera Highlights:**

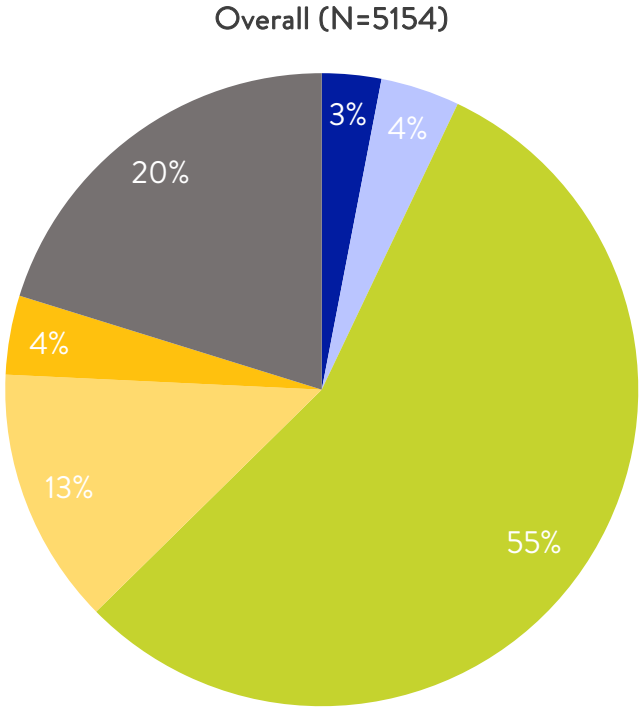
Opera donors' sentiments on organizations' DEI&A stance match those of arts donors overall.

# Most Opera Donors Satisfied with Orgs' DEI&A Stance

## Arts Org Response to DEI&A and Social Justice Issues



- Should be a lot less vocal/active on these issues
- Should be a little less vocal/active on these issues
- Has had the right response/taken the right actions
- Should take a somewhat stronger stand/do a little more
- Should take a much stronger stand/do a lot more
- Not familiar with their stand/action on these 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

## **Overall Takeaways:**

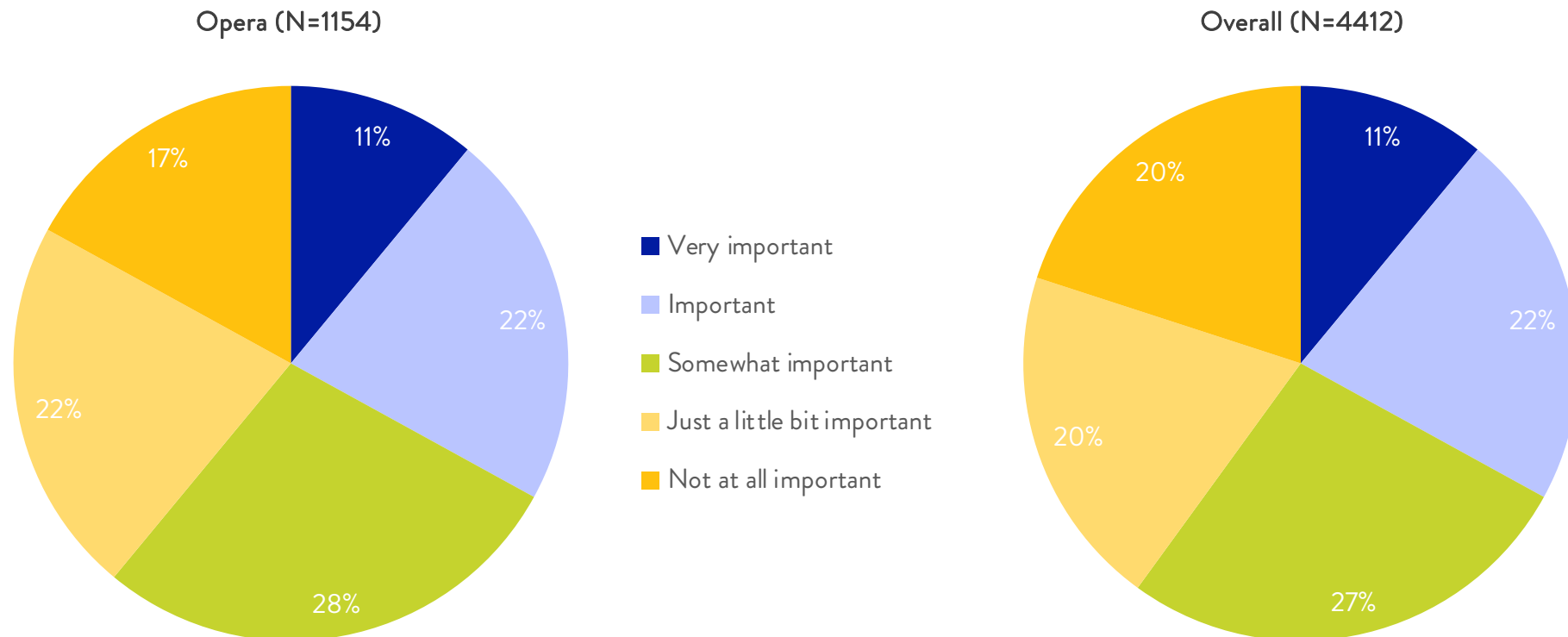
Most donors downplay the importance of benefits in their giving, saying they are only “somewhat” or “a little bit” important. They also claim they would not significantly (if at all) reduce their giving should benefits be changed or reduced.

## **Opera Highlights:**

Opera donors are similar to overall donors in their sentiments about benefits and the benefits they most value.

# Most Opera Donors Admit Benefits Are At Least A Little Important

Importance of Benefits On Giving Decision\*

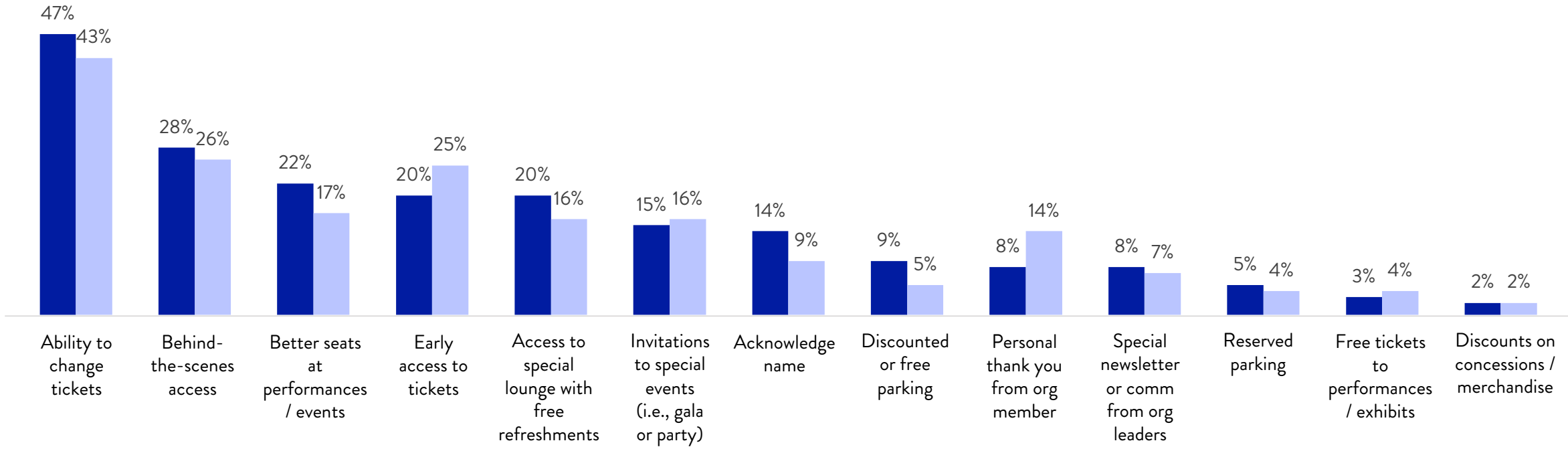


\*Respondents who did not receive benefits or did not remember what benefits they received did not answer this question "How important are these benefits or rewards to your decision to donate the amount of money you do to [PIPE IN ARTS ORG]?"

# Opera Donors Value Ticket and Upgraded Seat Benefits Most

Most Valued Benefits from the Arts Org\*

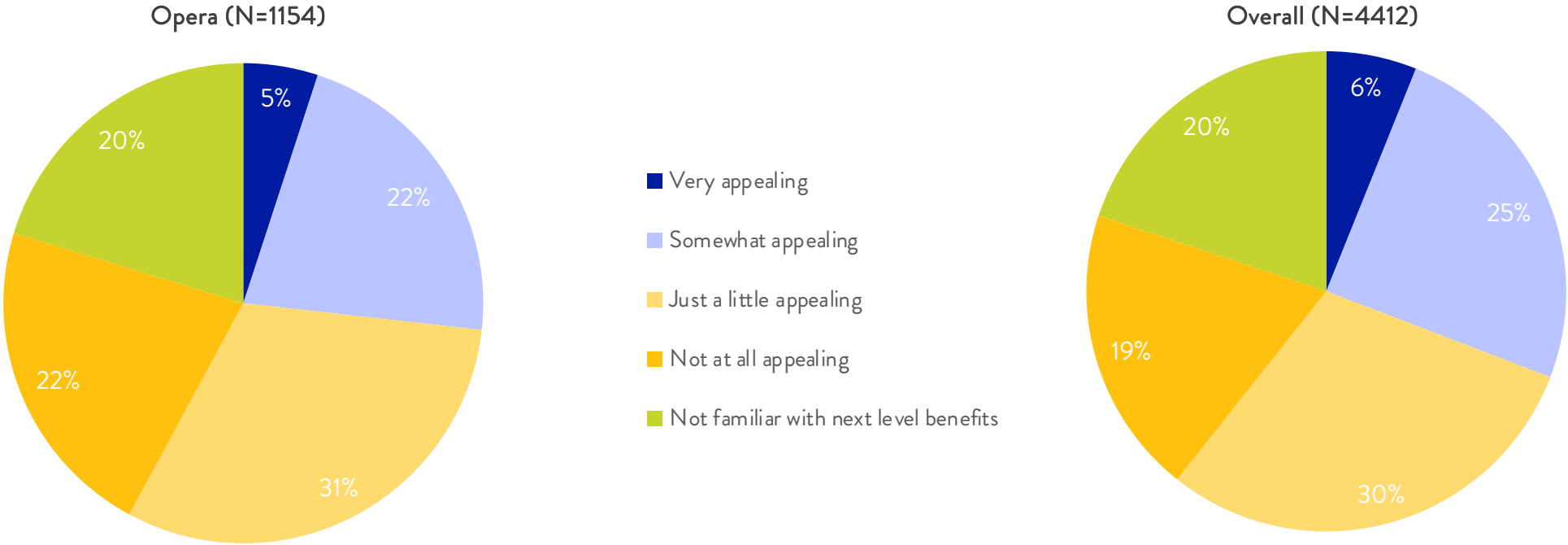
■ Opera (N=1154) ■ Overall (N=4412)



\*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 Opera Donors Not Incentivized By Next Level of Benefits

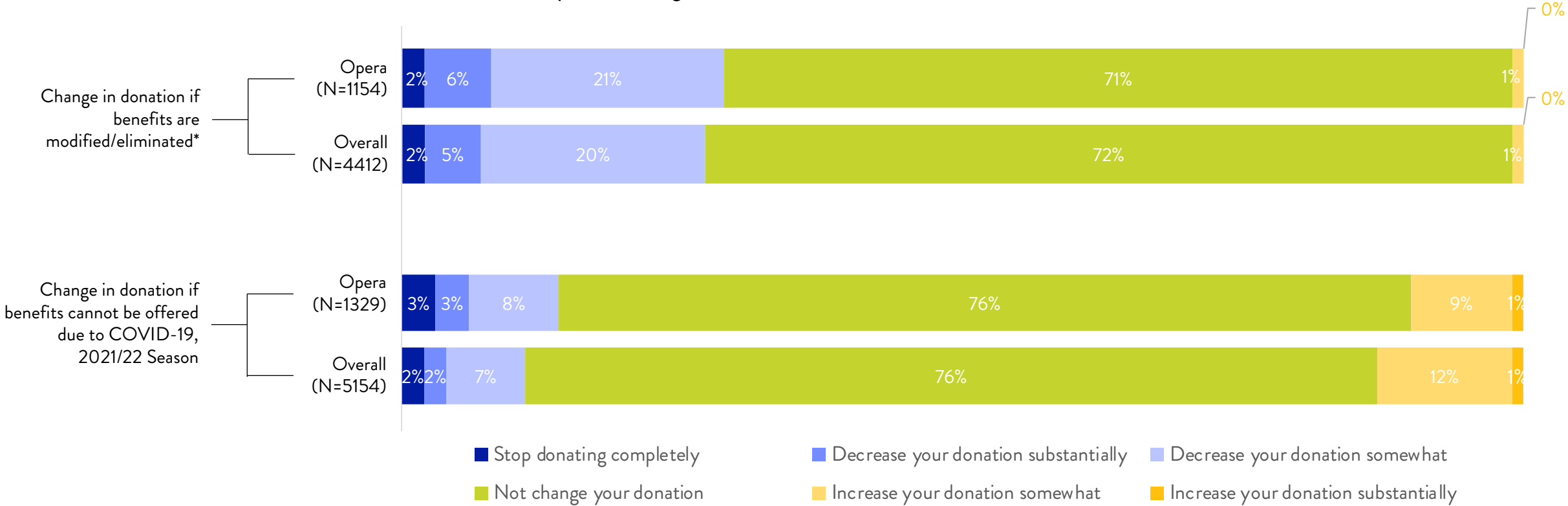
Appeal of Next Donor Tier's Added Benefits\*



\*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)?"

# Opera Donors Are Understanding, Especially of COVID-19

Anticipated Change in Donation if Benefits Are Modified



\*Respondents who did not receive benefits or did not remember what benefits they received did not answer this question

Top 2 bars: "If [PIPE IN ARTS ORG] modified or eliminated the benefits or rewards you most value, would you:"

Bottom 2 bars: "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

## Overall Takeaways:

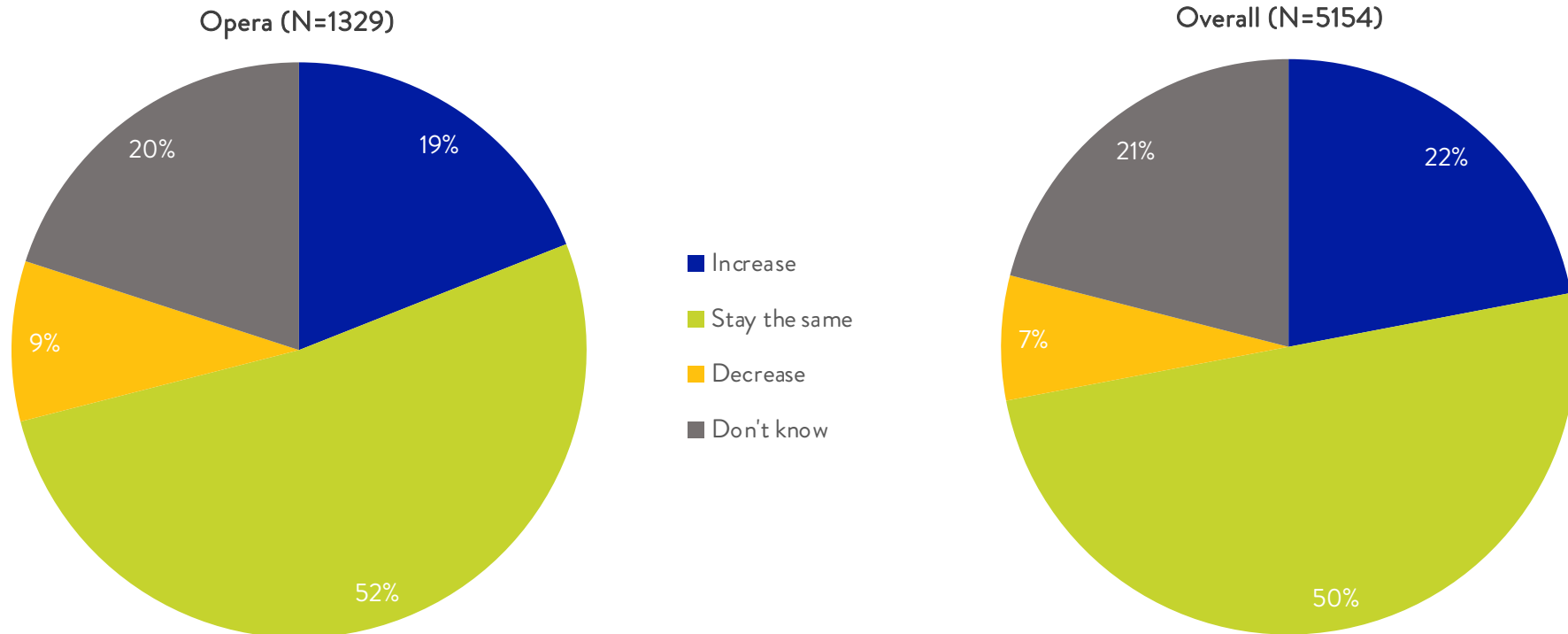
Approximately one-fifth of arts donors say they will increase the amount they give to their arts organizations in the next few years. There are five principal reasons for increase: increased donor capacity, an appealing org campaign, greater perceived need by the org, an appealing or exciting organizational 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.

## Opera Highlights:

Opera donors give similar reasons for increasing their donations as arts donors overall.

# Most Planning to Increase or Maintain Giving to Opera

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



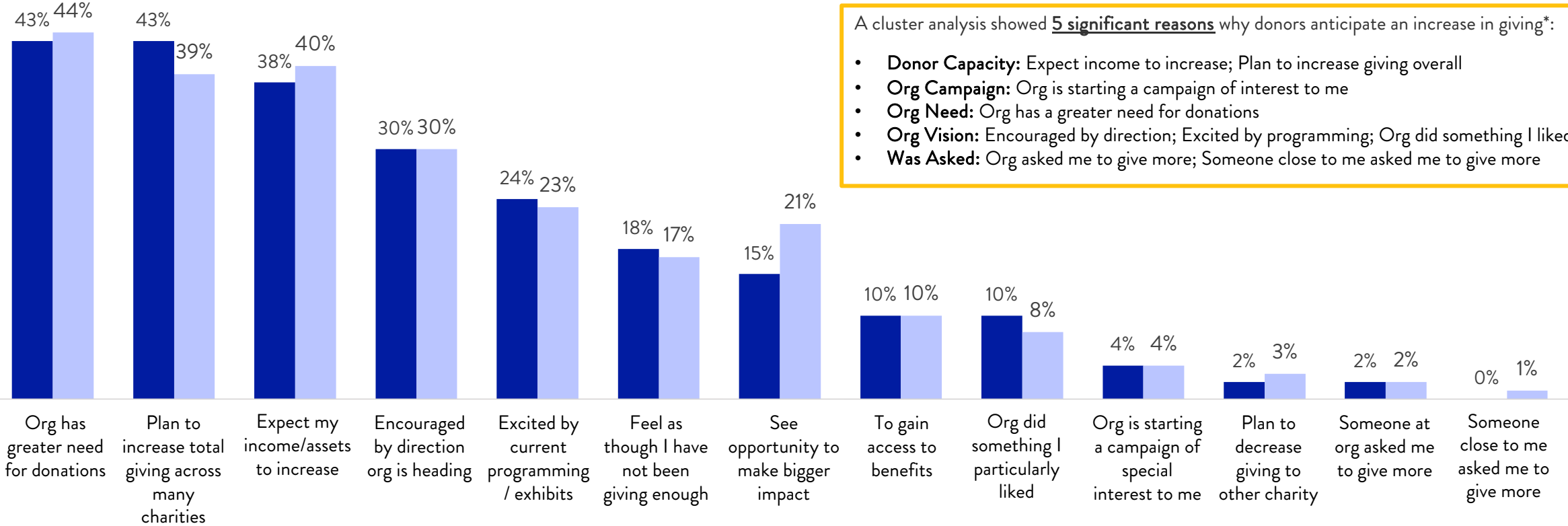
*"Thinking forward across the next 5 years, do you expect the annual amount of money you donate to [PIPE IN ARTS ORGANIZATION] to increase, stay the same, or decrease compared to your donations over the past 3 years?"*



# Anticipated Giving Increase to Arts Org Driven By Five Reasons

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

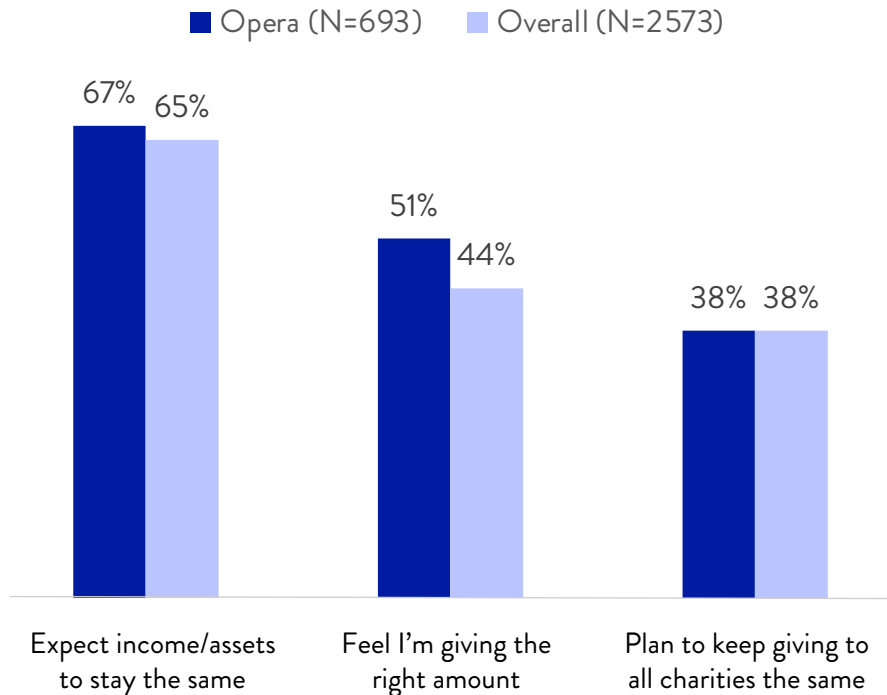
■ Opera (N=251) ■ Overall (N=1151)



\*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."

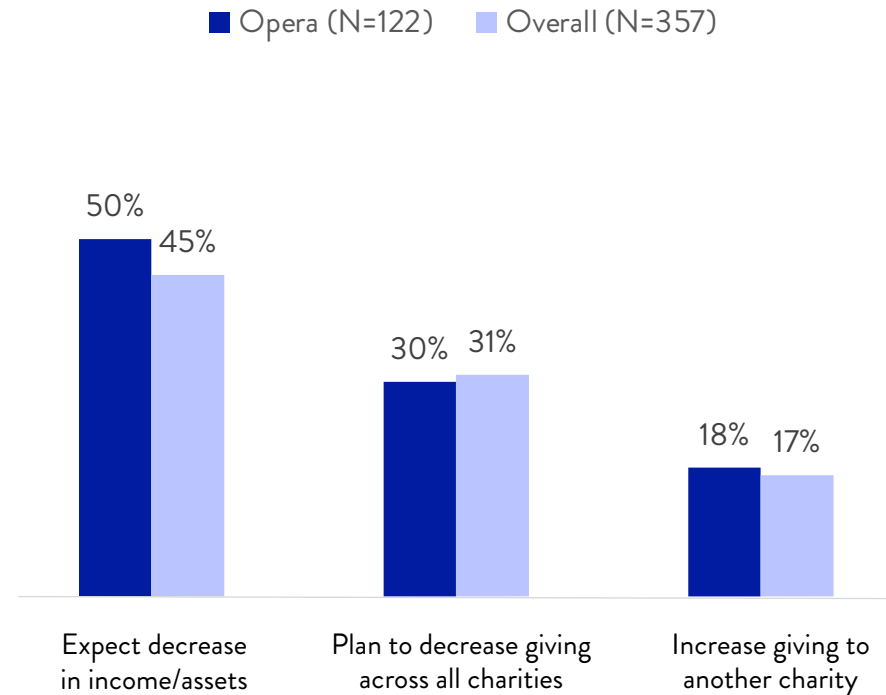
# Donor Capacity Most Cited Reason for Donation Stasis or Decrease

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



*"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



*"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

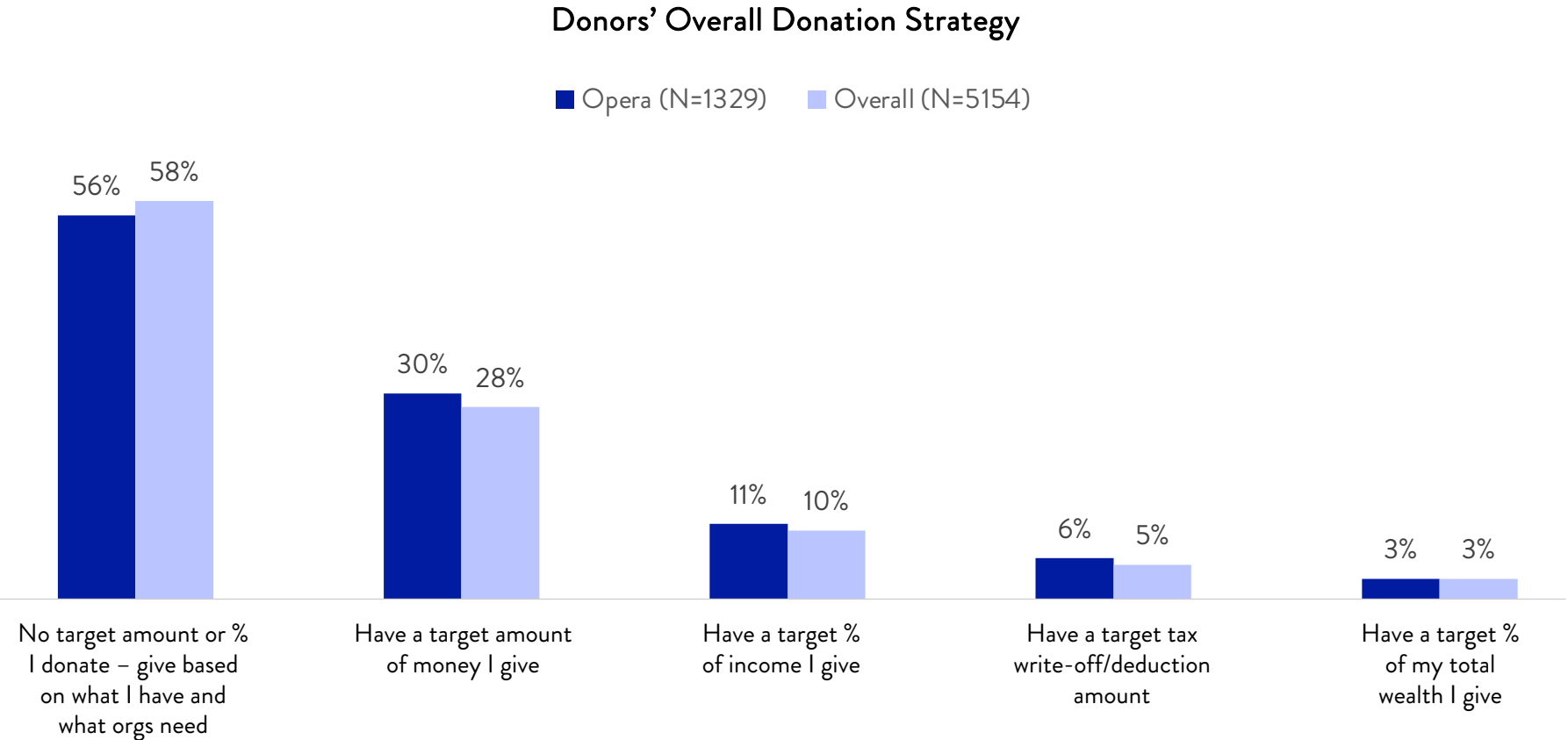
## **Overall Takeaways:**

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.

## **Opera Highlights:**

Opera donors match arts donors overall in their lack of donation strategy and planning.

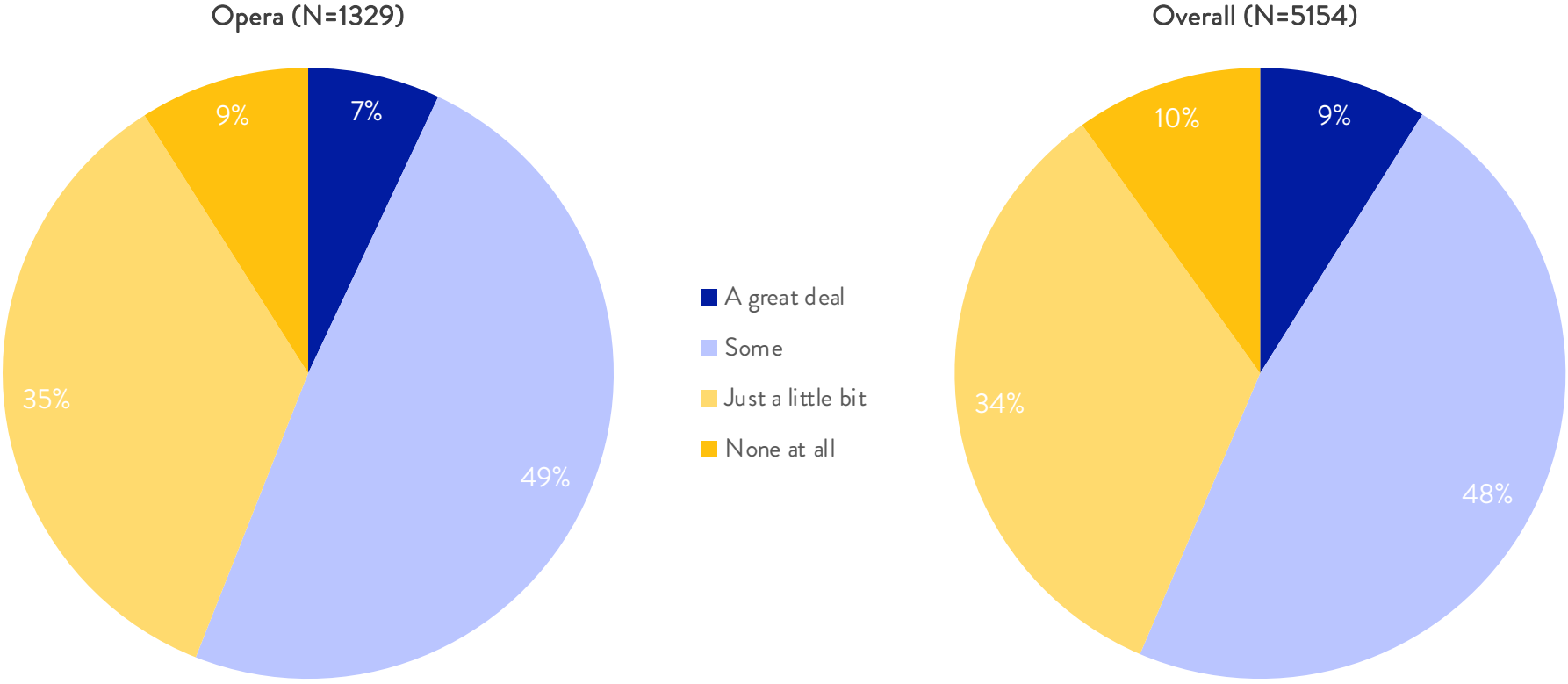
# Majority of Opera Donors Have No Personal Giving Target



*“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 Opera Donors Don't Spend Much Time Planning Giving

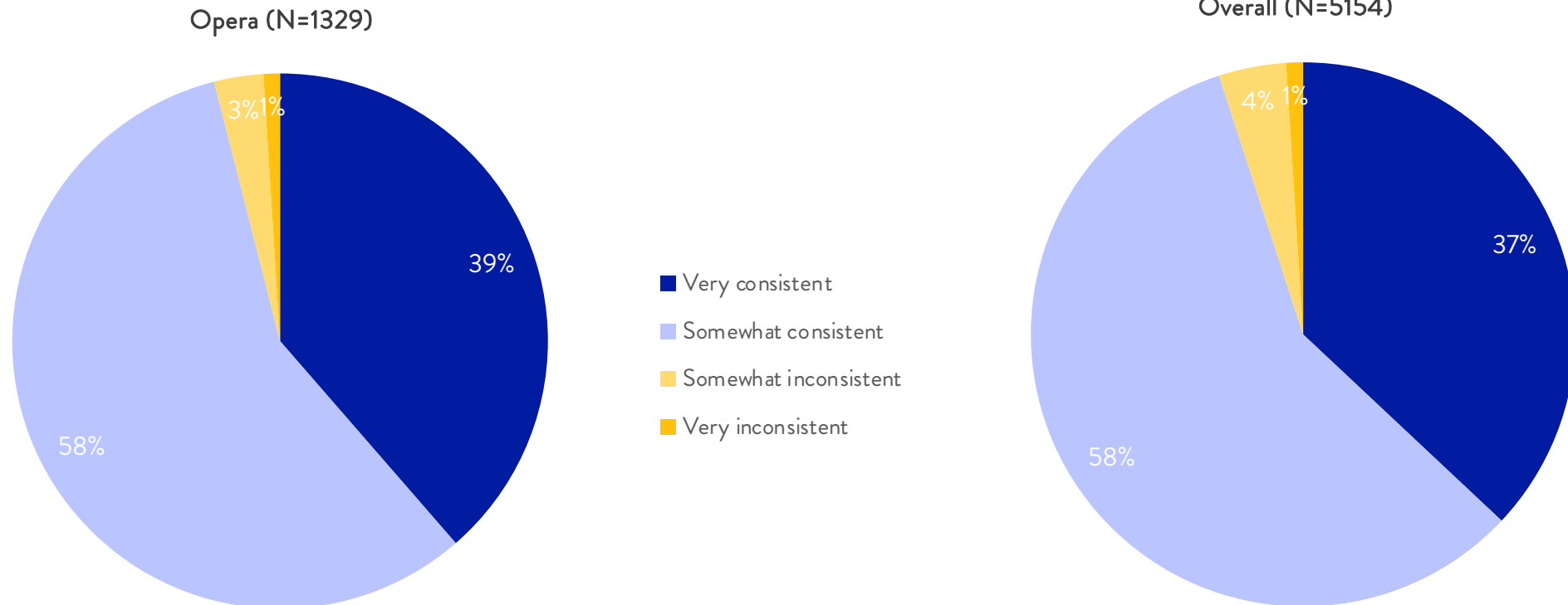
Time Spent Planning Donations Each Year



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

# Most Opera 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

