



Donor Research Report

Summary findings

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Background

Introduction

Fundraising is now a commonplace responsibility of many cultural practitioners, in part due to public funding cuts, new policy remits and a more competitive environment, but also due to a greater recognition of marketplace potential and a developing skills base within the sector to harness that potential. But while there is extensive data on why people engage with arts and cultural organisations, what they attend and their motivations for doing so through [Audience Finder](#), there has been a paucity of knowledge on the behaviour of individuals that give to inform organisations' donor development strategies.

In 2014, The Audience Agency undertook new research to address these gaps, linking intelligence about what we know about cultural audiences to help organisations understand better who gives, who has propensity to give, why and under what circumstances. Specifically this research focuses on the giving behaviours, attitudes and opinions of low-level donors and friends/members of arts, museums and heritage organisations. The starting point was the hypothesis that donors/members are core audiences, committed regular attenders and thus represent the best prospects for targeted donor 'asks'. For many organisations their frequent audience is their greatest 'asset' and insights into the behaviours and motivations of these individuals offer opportunities for generating additional income.

The views in this report are those of the authors and whilst they are based on evidence and provided in a clear and concise way, some elements are open to different interpretations and perspectives. We would like to thank consultants: Alix Slater, Sarah Gee, Ruth Jarrett and Amanda Rigali of Arts Fundraising and Philanthropy, who offered their time and expertise as part of our Reference Group for this research and Baker-Richards, who undertook the Nottingham data-mining research. We are especially grateful to the arts and cultural organisations in the Spirit Nottingham cluster who contributed data and made the research possible.

Methodology

During 2014 we worked with a cluster of four arts organisations as part of the Spirit Nottingham cluster to combine analysis on individuals' donation habits from their booking data (sample 244,494 customer records), which was mined by Baker Richards. An audit of their giving and donor development asks was also undertaken and the data mapped and profiled using Audience Spectrum and Mosaic.

In addition to this first stage we wanted to understand audience motivations for giving and The Audience Agency carried out a follow up survey with six cultural organisations in the same Spirit Nottingham cluster (sample size 436). The survey focus was why and how individuals give to arts organisations, the frequency and recency of their engagement behaviour, as well as their attitudes to wider cultural and charitable giving.

The last stage of the research involved a 'panel survey' of people across England to add depth and validate the Nottingham survey findings at a national level. This survey (sample size 2,461) question set also included questions on individuals' memberships of arts, museum and heritage, outdoors and nature related organisations. Finally, Audience Spectrum segmentation analysis explored the differentiated propensity of respondents that give linked to their arts, museum and heritage engagement behaviour.

The following report is a summary of our findings. This is supplemented by further insight articles from the data and the creation of new products and services under *Donor Finder*, which will help cultural organisations identify and develop prospective low level donors and members more effectively in future.

Headlines

Spirit Nottingham booking data

The research undertaken by Baker Richards was based on the box office booking data from a specific sample of Nottingham venues who were all on the Tessitura ticketing network. This has helped us to understand more about patterns of giving and how this correlates to their engagement behaviour.

Summary of findings:

- Number of donors, donations and value donated increased, although the average amount donated declined slightly.
- Donors are much more likely to be members or retained, frequent bookers when compared with non-donors.

- Only a minority of members also donated during the period of their membership.
- A significant number of members do not book at all during the period of their membership. (This still represents a greater proportion of members donating when compared with non-members).
- Members donate to organisations at which they are not members.
- Majority of donors and donations were transaction-related.
- New bookers are more likely to make transaction donations.
- Seat & capital campaigns generate disproportionately high levels of income.
- Donors are not venue loyal, they are much more likely to have booked at multiple venues across the period and they are also more likely to crossover within a single year.
- Donors who book at only one venue per year generally donate to that venue.
- Over half of transaction donors who booked in 2012 had not booked in 2011 and 40% did not return in 2013.
- In most cases donors appear to purchase tickets at a slightly higher yield than non-donors and book tickets with a slightly higher face value.
- A higher proportion of donors purchase a ticket with some form of discount when compared with non-donors.
- Donors are more likely to book for plays or music and are less likely to book for musicals, musical theatre or pantomime when compared with non-donors.
- Audience Spectrum segments, *Trips & Treats*, *Dormitory Dependables* and *Commuterland Culturebuffs* account for more than half of all bookers.
- Donors appear to present similar patterns to non-donors. However when indexed against all bookers, there is a greater representation of *Metroculturals* and *Commuterland Culturebuffs* than other segments.

Spirit Nottingham survey data

A follow up quantitative survey of donors/members with an enhanced group of Nottingham organisations was subsequently undertaken to find out more about donor attitudes and motivations for giving. This built our understanding of decision making and provided demographic context and profiles of donors/members at an individual and aggregate cluster level.

Summary of findings:

Donors are the most likely to:

- Have joined a membership scheme (75%); been a member for more than 4 years (38%) and agree that they are likely to renew (89%).

- Want tangible benefits or financial incentives for joining a scheme (91%).
- Have made a one off donation when purchasing a ticket online or via a donation box.
- Be a regular attender - and visited in the past 12 months (85%).
- Have attended a theatre performance (83%); historical/heritage site (67%); mainstream cinema (67%) or museum (65%) in the past 12 months.
- Think it is very important to support the arts (43%) and may give more in future (27%).
- Feel very informed (27%) about opportunities to give at the organisation they attend.
- Consider that the way an organisation is funded is important to their decision to support it (40%).
- Support a mixture of other organisations - most commonly: English Heritage, National Trust, The Art Fund, Tate and the British Museum.
- Have given a one-off donation once (35%), twice (21%) and three or more times (30%).
- Have given to a capital appeal once (57%) and have given to a seat campaign once (88%).
- Be most interested in supporting arts organisations: by attending a fundraising event (59%); improve access for young/socially disadvantaged people (56%); support education work (52%) or support artistic work or artists (43%)
- Typically are White British, female, older 50+, employed and not professionally involved in the arts or cultural sector.

Members also give via donation boxes, fundraising events and cite their purchase of tickets and use of the café as donations although arts organisations would not perceive the latter two as donations.

National panel survey research

The final strand of our primary research was undertaken with a sample of individuals across England. Screening questions were asked in order to determine that respondents were representative of the population and had engaged with the arts in the last three years.

The broad themes the questions addressed enabled us to explore the engagement habits of audiences and visitors to the arts, museums, heritage, outdoors and nature, their demographic profiles and common giving characteristics - comparing these with their other charitable giving behaviour/characteristics. There are other national research indicators that can be used as comparators/benchmarks (e.g. Taking Part and our Audience Finder dataset), however our specific questions for this survey addressed the following:

- Membership across Arts/Museum/Heritage/Outdoors/Nature etc. - membership numbers, types, reasons

- Donations in the context of Arts/Museum/Heritage/Outdoors/Nature etc. and wider charitable giving behaviours
- Context of opinions of the arts, ease of/proximity to access culture, frequency and recency of engagement, general levels of interest in a cultural offer
- Donations in detail - numbers, types, method, reasons
- Context for supporting the arts and if, how and why they may support in future

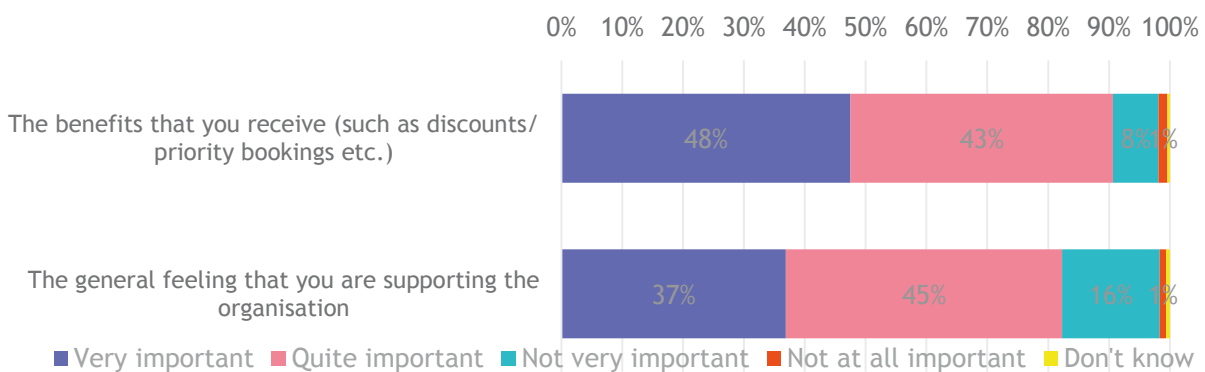
Summary of findings:

Membership

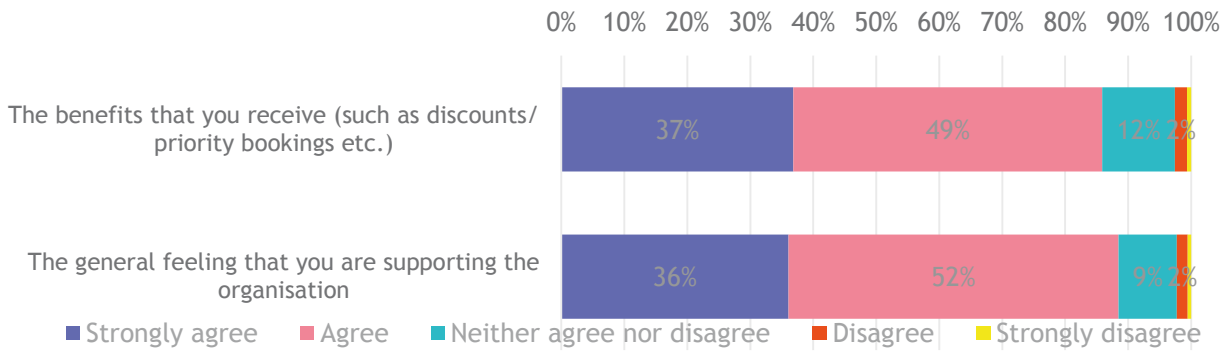
Consolidating the findings of previous research in the sector, this research addressed whether being a member encouraged giving or cannibalised it. Addressing what membership means for individuals, how it affects giving behaviour and to what extent it relates to frequency and recency of engagement.

The findings demonstrate that broadly one in five (20%), who have attended or engaged in the arts in the last three years, have at some point paid to be in an Arts related scheme.

Just under half (48%) of individuals are driven to join Arts related schemes because of the benefits associated with such schemes, though over a third (37%) do so to support the organisation.



For museums, heritage, outdoors and nature related schemes, the proportion of people who have at some point paid to be in a scheme is higher, at over a third (37%). Benefits are again the driver for the majority, although in line with responses above, a significant proportion (36%) do so to support museums, heritage, outdoors and nature related organisations.



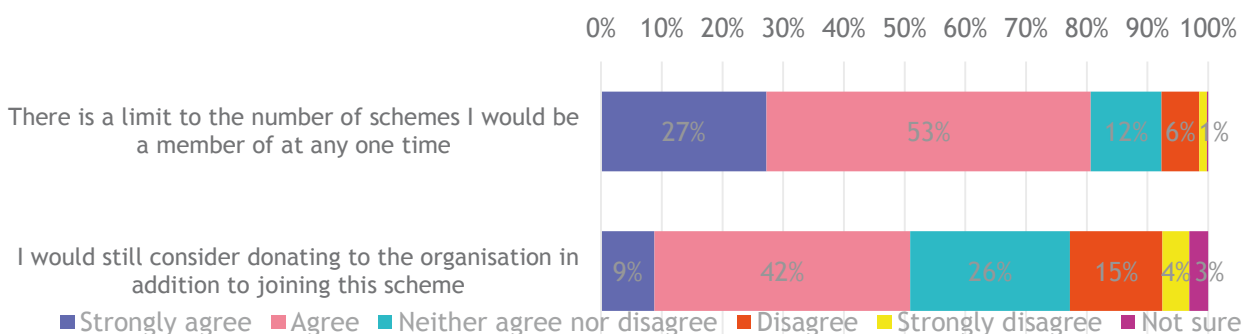
Interestingly very few individuals stated that they benefit from anyone else’s membership of a museums, heritage, outdoors and nature related scheme, (85%). This is even higher for those who have been a member of an Arts related schemes (89%).

So although the evidence points to the fact that people are driven by benefits to join schemes, they also see such schemes as a way of supporting the organisation, a finding which is consistent across the Spirit Nottingham survey responses.

Donations in addition to membership

For individuals who make donations in addition to joining a scheme this was less significant - only a small proportion (9%) strongly agreed that they would consider this, although nearly half (51%) agreed. So whilst this is not as strong a sentiment, it is a positive indicator, that of the population surveyed, 1 in every 2 people are in the market for making additional donations in addition to being a member.

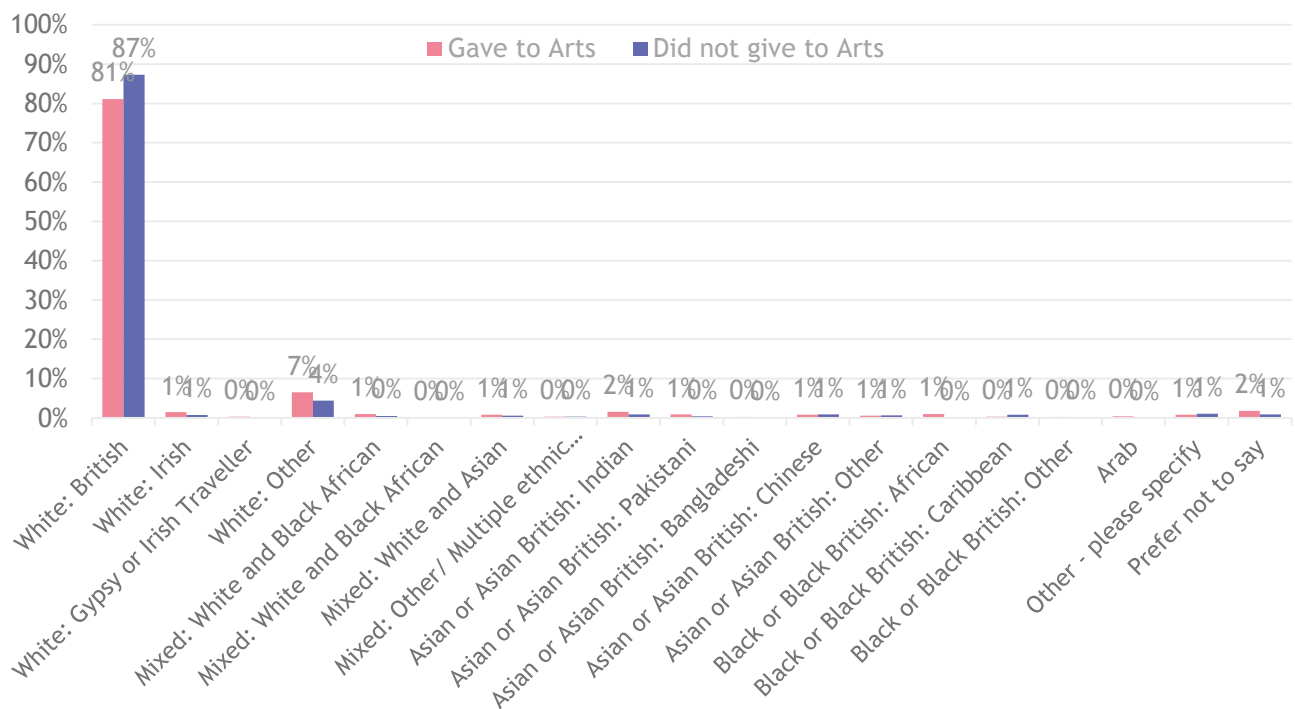
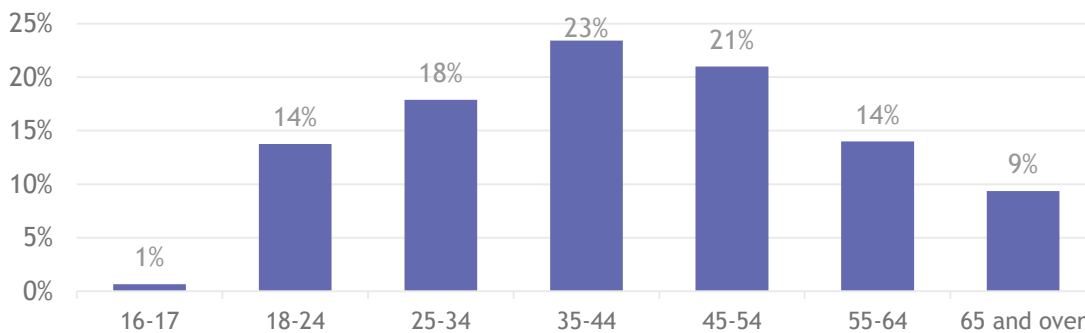
However, 4 out of 5 people said there was a limit to the number of Arts related schemes they would consider joining. Nearly half (43%) were currently a member of just one Arts related scheme and just over 1 in 10 were a member of two schemes. Most notably over a third (38%) were not a current member of any Arts related scheme.



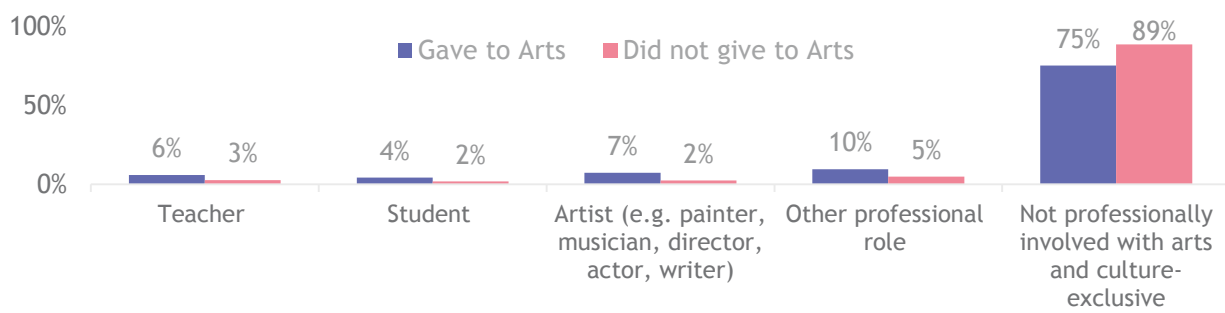
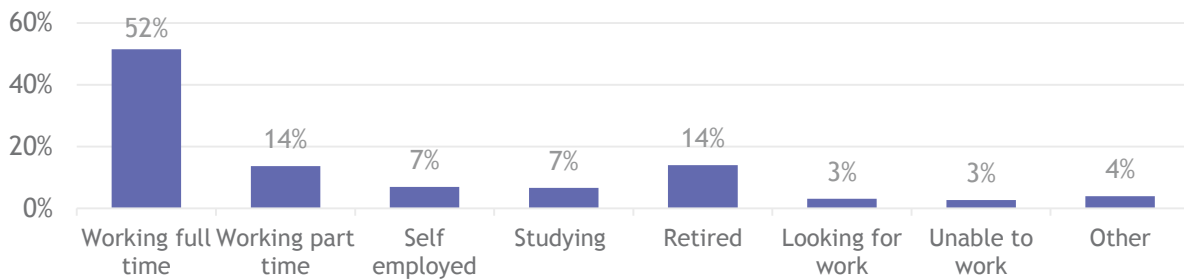
The findings for museums, heritage, outdoors and nature related schemes were comparable. Nearly half (41%) were currently a member of just one scheme with 12% a member of two schemes and 42% not a current member of any museum, heritage, outdoors or nature related scheme.

Donor profiles

The age range of individuals appears to be skewed toward the younger end of the spectrum when compared against the standard benchmark for non-arts charitable giving nationally. Over two thirds (77%) of those who say they give are aged 16 - 54. The findings for ethnicity and gender are consistent with previous research, with respondents predominately White British (81%) and more likely to be female (52%).



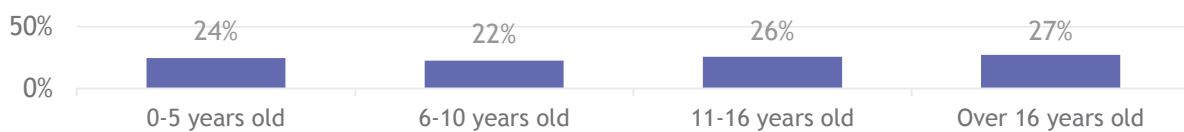
With regard to employment, over half of individuals (52%) work full-time, the vast majority of whom are not professionally involved in the arts and cultural sector.



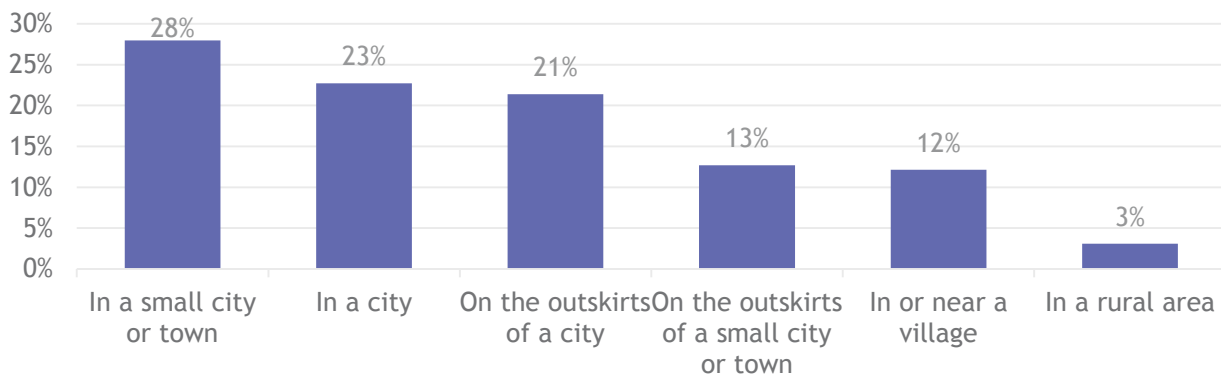
Half of respondents (50%) have children, two thirds (63%) of which have children still living at home.



Of those with school age children living at home, the vast majority (72%) have children who are still in full time education (5 - 16 years).

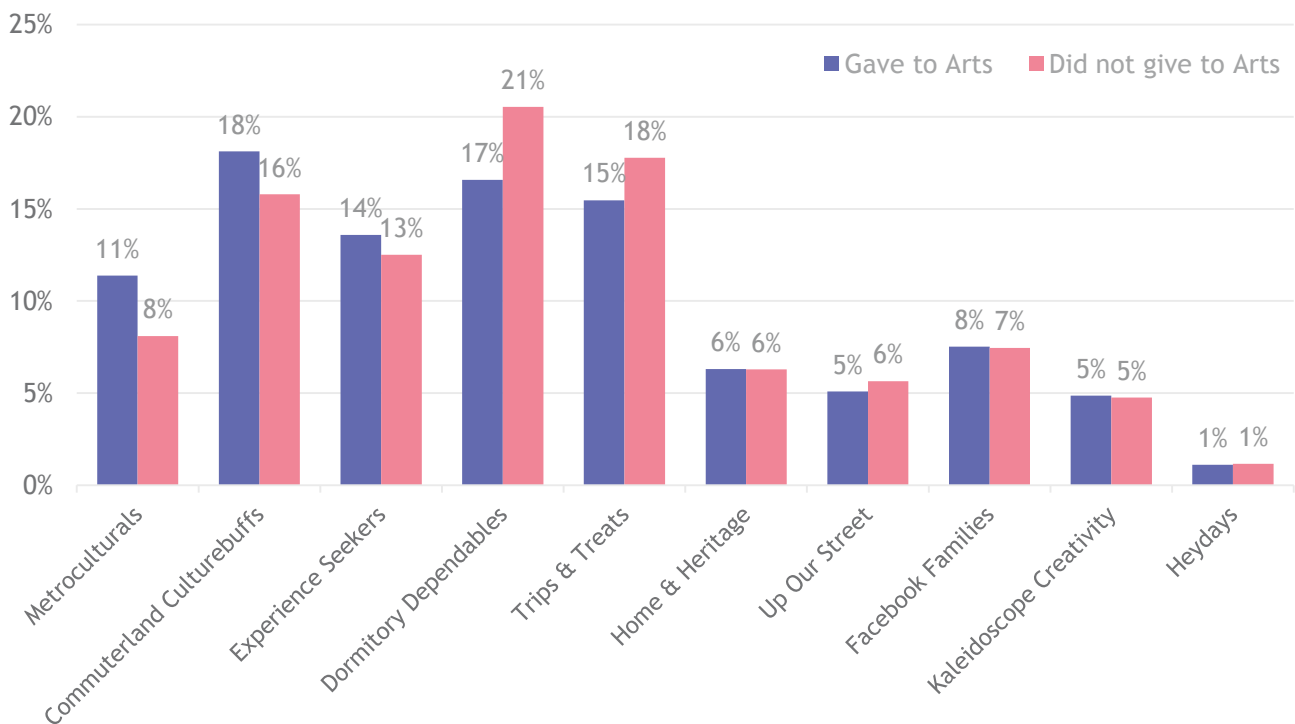


The location of individuals is skewed towards larger urban conurbations with the majority of those surveyed (85%) living in or within close proximity to a city or town; and 3 out of 5 having lived at the same property for more than 6 years.



Audience Spectrum and Mosaic Profiles

The nuances of the Audience Spectrum profiles are of potential interest here, but what is most notable is how far audience profiles match those of the population; with those respondents who give matching the “usual suspect” audiences for the arts. The more ‘highly engaged’ groups of *Metroculturals*, *Commuterland Culturebuffs* and *Experience Seekers* account for just under two fifths of the population (39%), but represent 43% of those who say they give to the Arts.

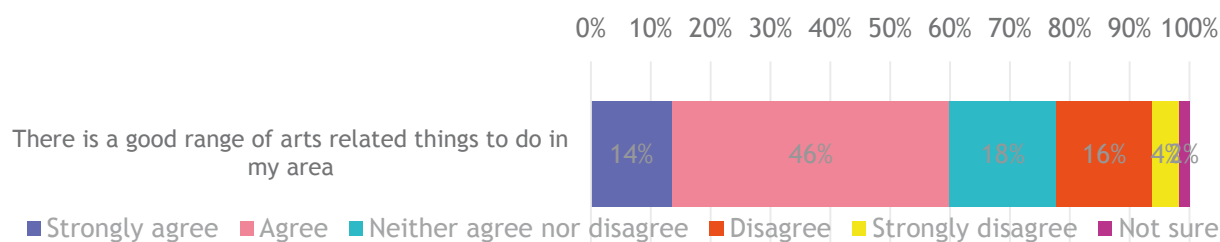


Comparatively higher proportions of donors are from *Metroculturals* and *Commuterland Culturebuffs* Audience Spectrum segments when compared to the population as a whole. From the Nottingham research the dominant segments amongst those organisation’s donor base were *Dormitory Dependables* and *Trips & Treats* - segments which were over represented when compared to their local population. Variations in donation behaviour by those bookers suggests that the ‘ask’ is crucial and would affect propensity to give (and, potentially, to repeat give).

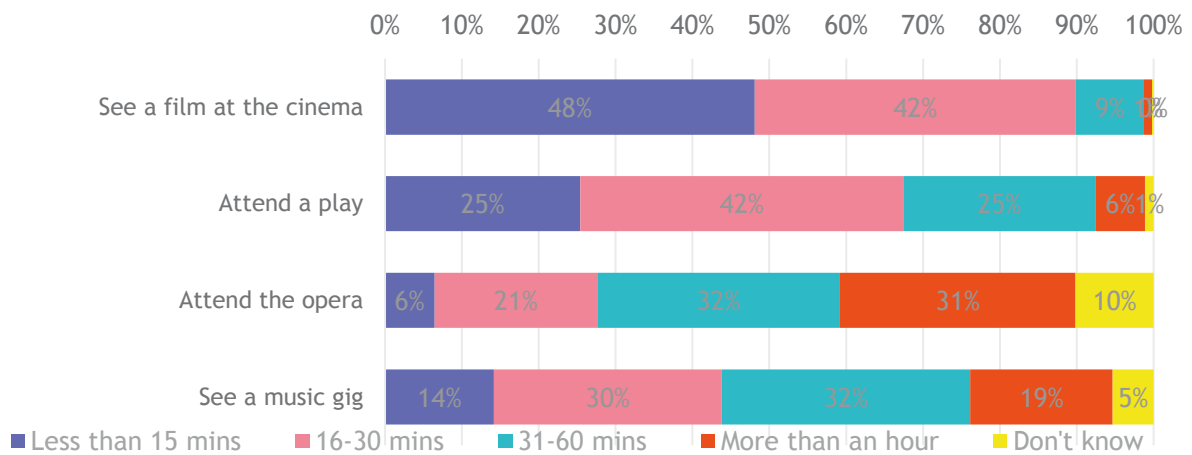
Different ‘asks’ for the Arts therefore appeal to different segments/types of attender: from our national research it can be seen than *Commuterland Culturebuffs* are more likely to make a transaction donation (19%). *Experience Seekers* are more likely to volunteer their time (21%); *Dormitory Dependables* are more likely to attend a fundraising event (19%) or have sponsored a person to do something (16%), whilst *Experience Seekers*; *Commuterland Culturebuffs* and *Trips and Treats* are most likely to have taken part in a charity event themselves.

Proximity and frequency of engagement

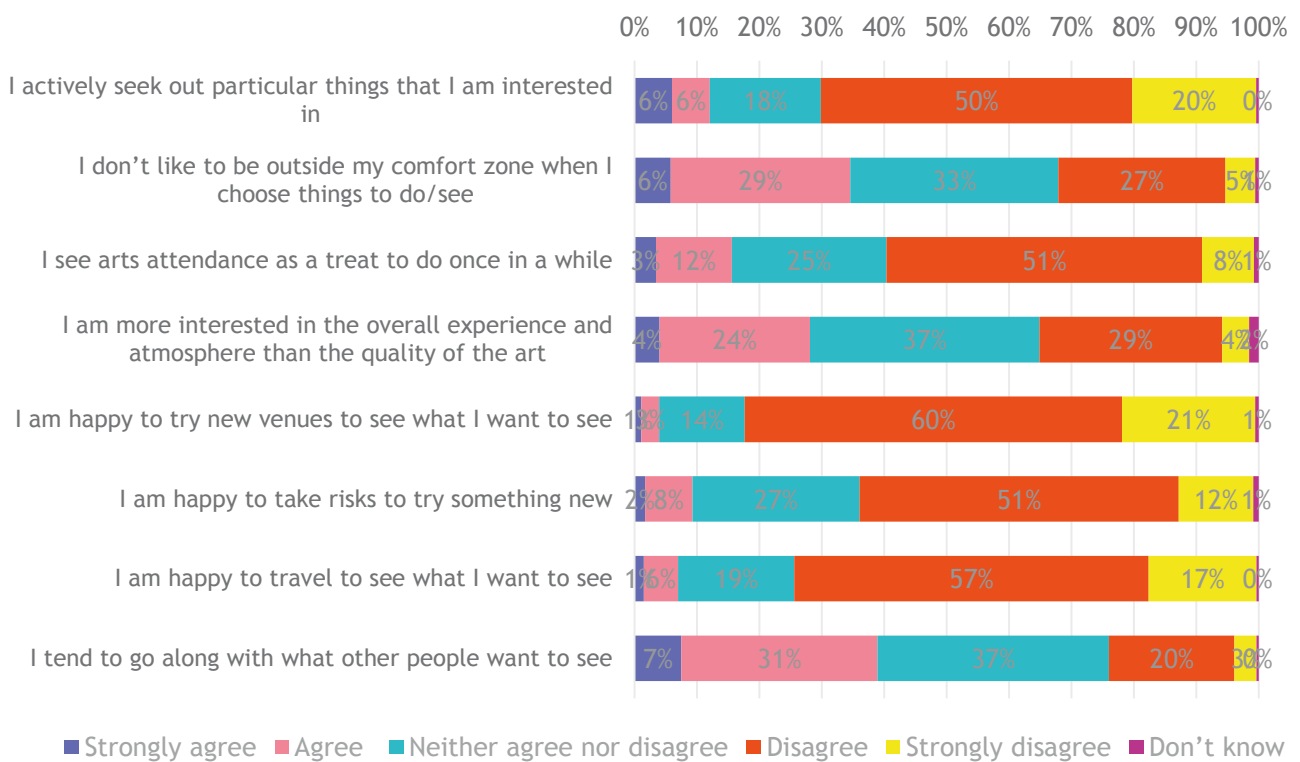
Three fifths (60%) of respondents consider there is a good range of arts related things to do in the area in which they live.



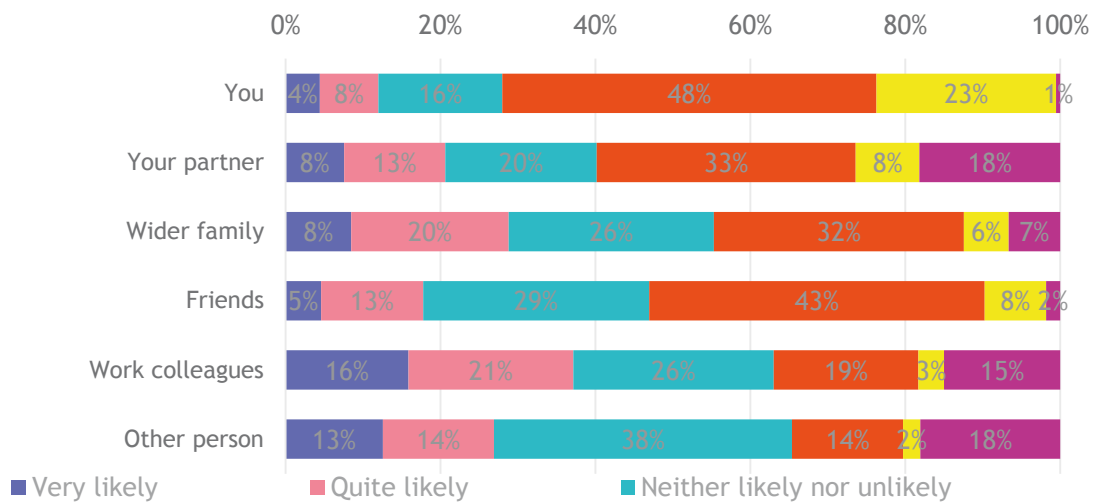
However, whilst relatively high numbers are able to access a cultural activity within 30 minutes, two thirds see themselves as regular but not frequent attenders, with 67% having attended a Play, 48% Cinema and 54% a music event. This drive time analysis is consistent with findings from our national Audience Finder dataset which has yet to show much more than 10-15% of audiences coming from over a 60 minute drive-time.



Just under a third of respondents consider themselves to be frequent attenders, with just 12% actively seeking out particular things to do and only 1 in 10 happy to take a risk to try something new.

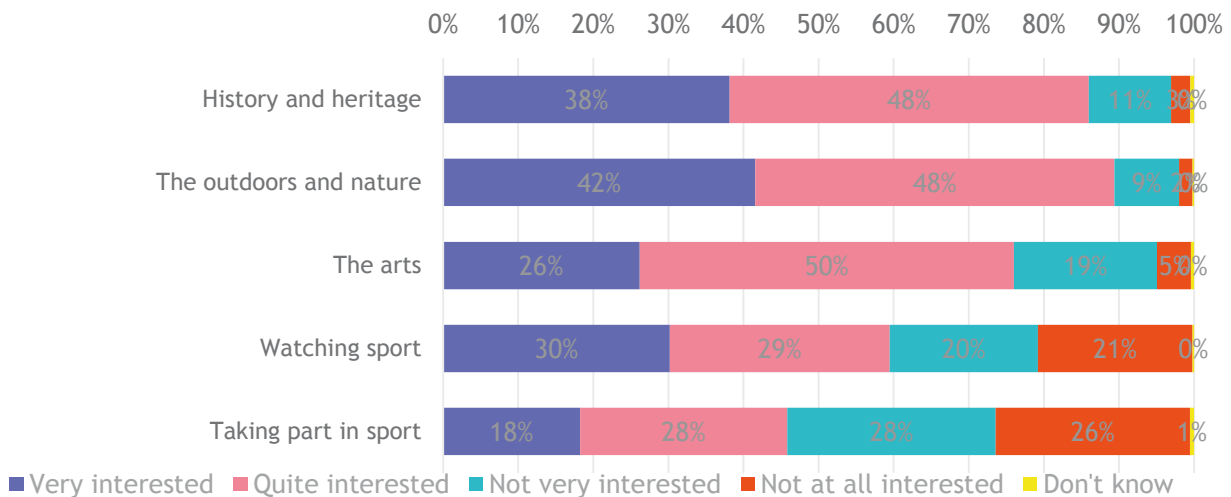


It also appears that individuals do not necessarily see themselves as initiators when choosing to go and see an event, with just over 1 in 8 people saying that they are very or quite likely to suggest a visit.



So if the majority don't see themselves as risk takers, frequent or proactive this may have significant implications for cultural organisations' marketing and communications messages. In practice such potential donors may not necessarily be as confident in their cultural choices or as knowledgeable as organisations may assume them to be.

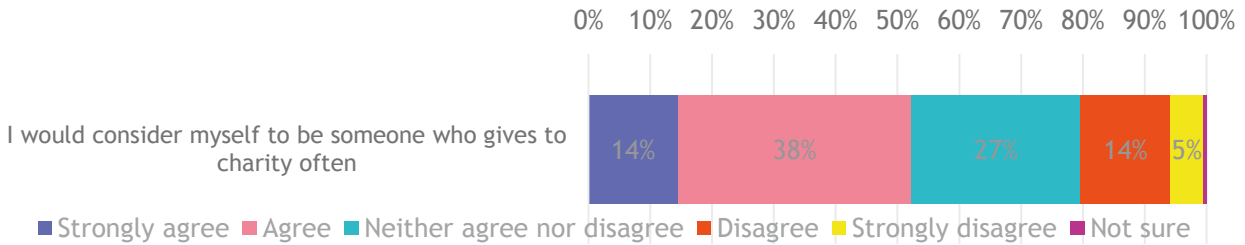
When asked about their general level of interest in the Arts, over a third (76%) of respondents are very or quite interested, though both outdoors and nature, history and heritage are rated more highly. Watching and taking part in sport prompted lowest levels of interest overall.



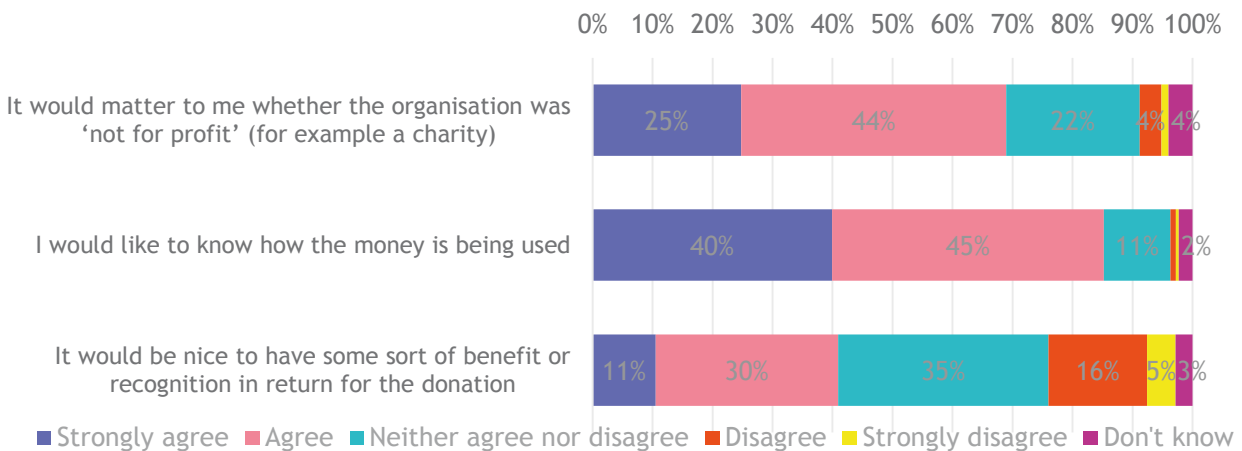
Based on the above findings any donor development strategy would need to be looked at in the context of audiences' overall levels of interest in the art form/subject area as well as their attendance frequency and recency.

Charitable giving behaviour

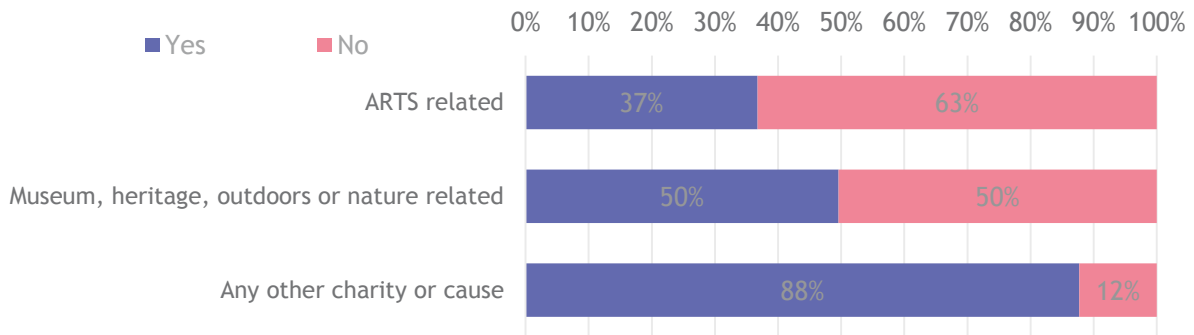
Crucially individuals say they do not give to the Arts in isolation - the vast majority (88%) have supported non-cultural charities or causes and over half (52%) consider themselves as giving to charity often.



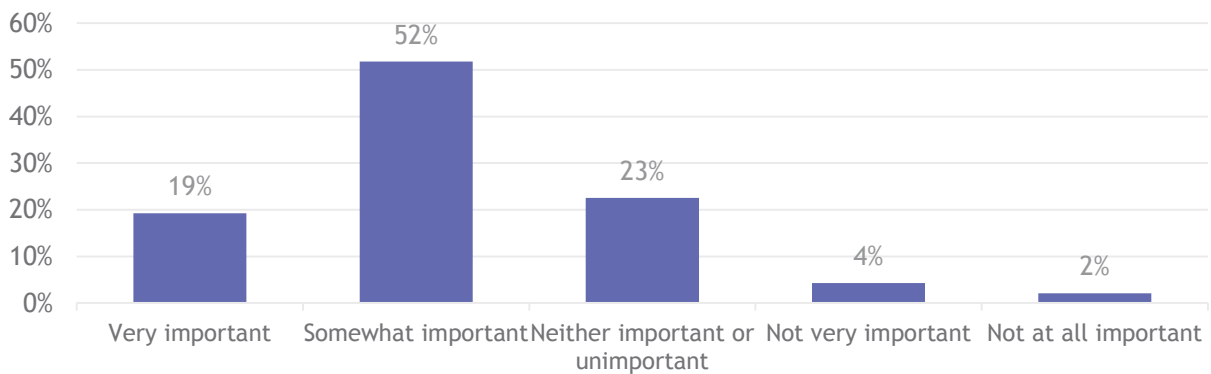
However, whether an organisation is a charity or 'not for profit' is of significant importance to over two thirds (69%) of respondents, with an even higher level of importance (85%) placed on the need for information from the organisation on what the donation is to be used for, while roughly 2 out of 5 people (41%) consider it would be nice to have some sort of recognition or benefit for their donation.



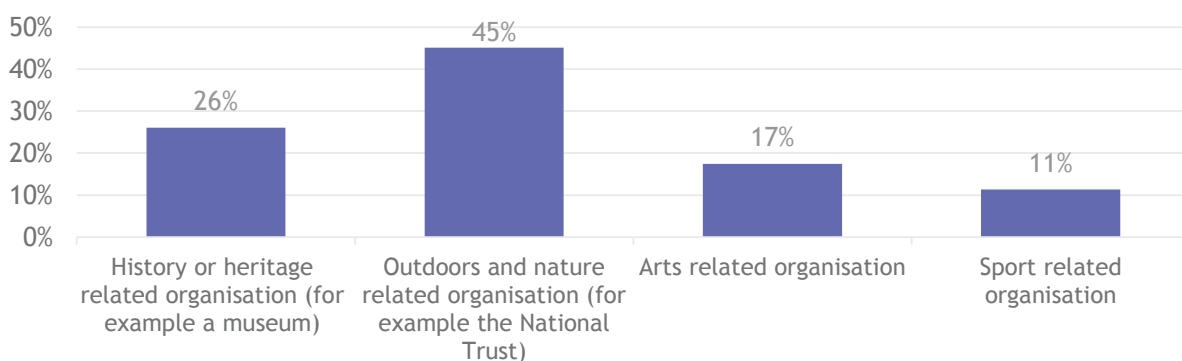
When looking at what individuals say they have ever supported, the Arts ranks lowest with just over a third (37%) having given, while half (50%) have supported a museum, heritage, outdoors or nature related organisation. Only 12% have never donated or participated in giving to any charity or cause.



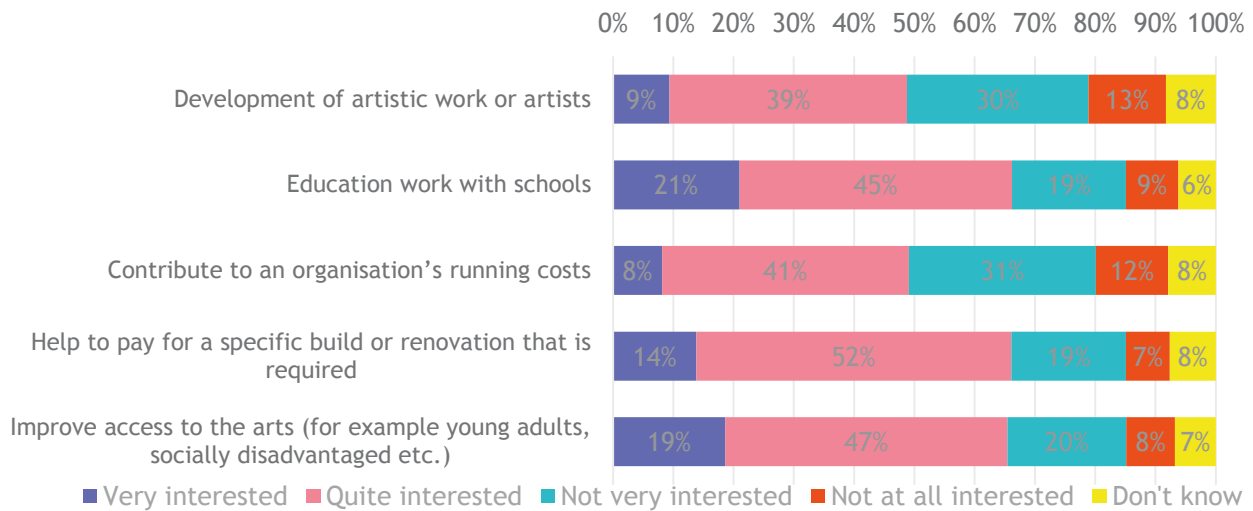
Although less than 1 in 5 people (19%) consider it important that the Arts is supported by charitable giving from individuals, over half (52%) think it somewhat important.



Respondents were given a hypothetical £100 to donate and asked to choose a cause for that donation. Less than a fifth (17%) considered the Arts was most worthy of that donation in comparison to just over a quarter (26%) for museums or heritage organisations and nearly half (45%) for outdoors and nature related organisations.

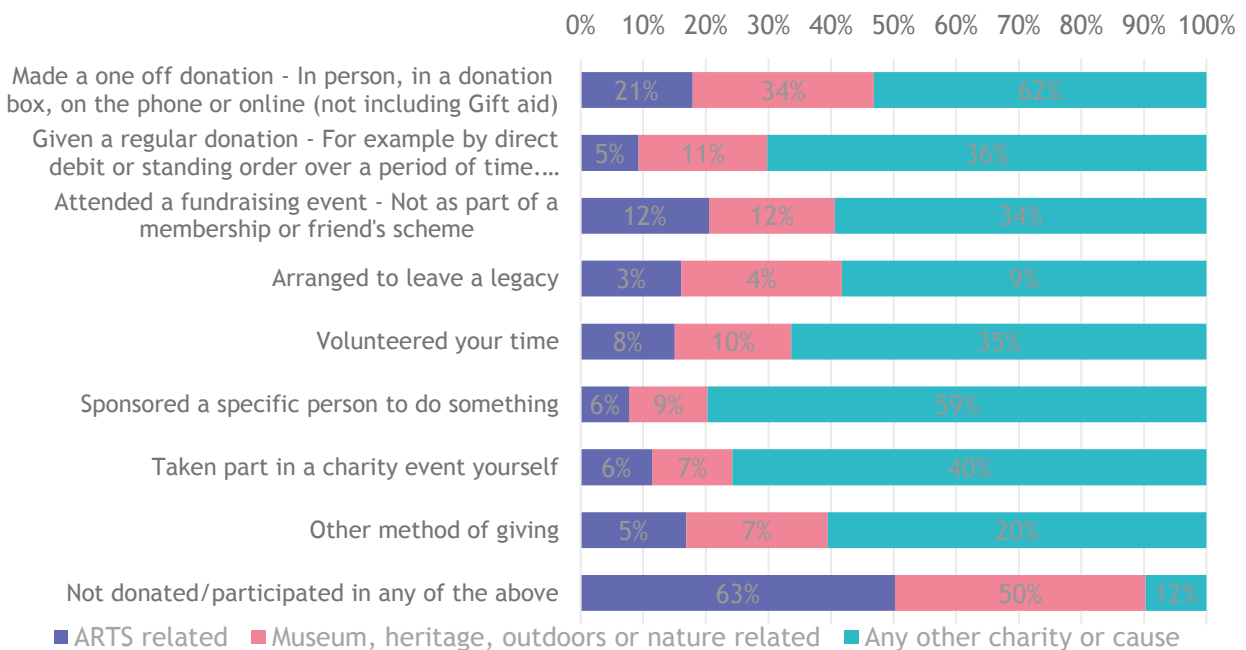


Individuals that choose to donate their £100 to an Arts related cause, were provided with a further list of activities the donation could be used to support. Education work with schools; improving access for the young and socially disadvantaged and support to help pay for a specific build or renovation were highest rated from the list.



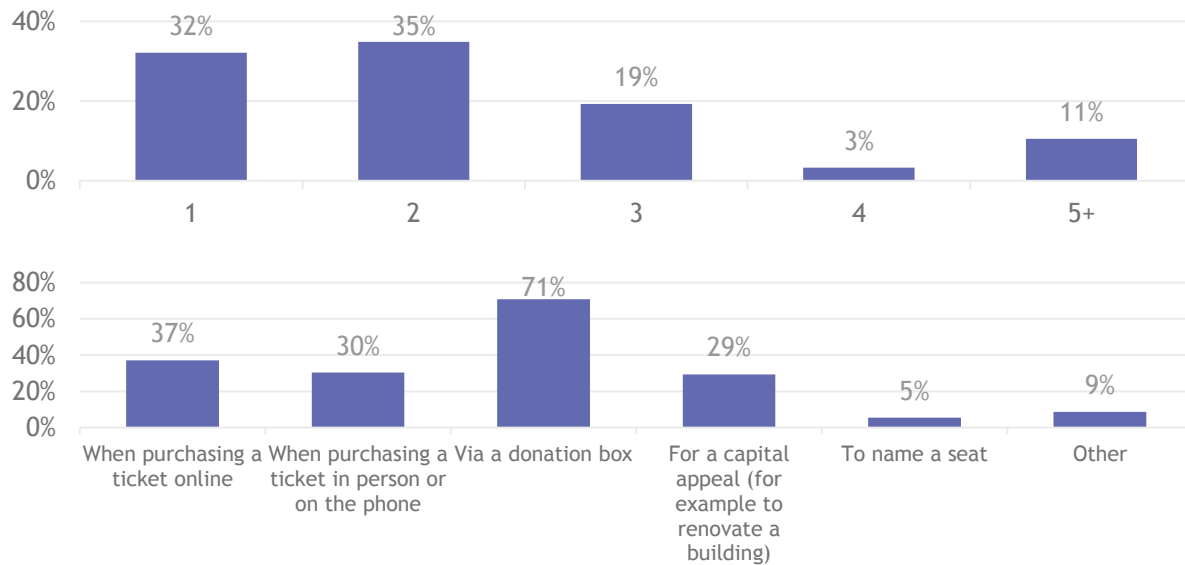
Cultural giving behaviour

More than half (55%) of one off Arts donations have been made via a donation box, online, by phone or in person.

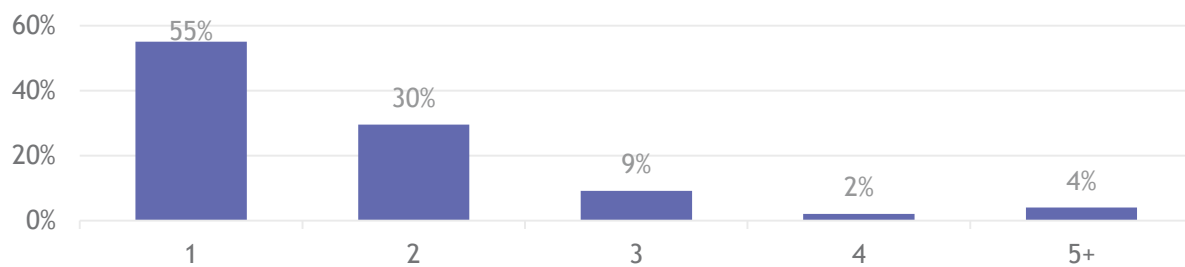


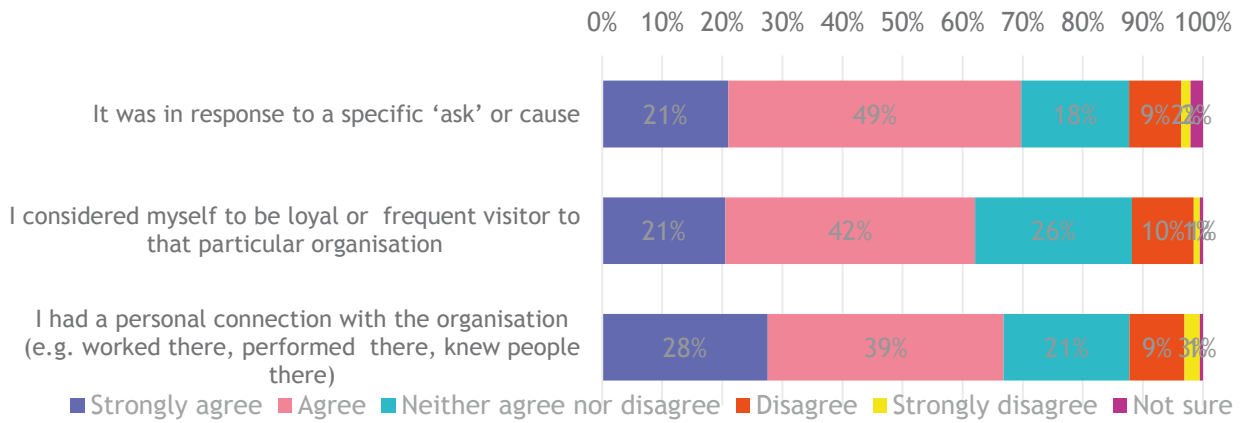
Notably two thirds (65%) of individuals who say they first did this, did so as a result of a specific ask, while less than half (43%) first did so because they consider themselves to be loyal or frequent attenders. Over a third (35%) first did so because they have a personal connection with the organisation and two thirds (67%) first did so as a 'spur of the moment' decision.

In making a donation, two thirds (67%) have supported two organisations or less with one off Arts donations, of which a third (71%) were via a donation box.

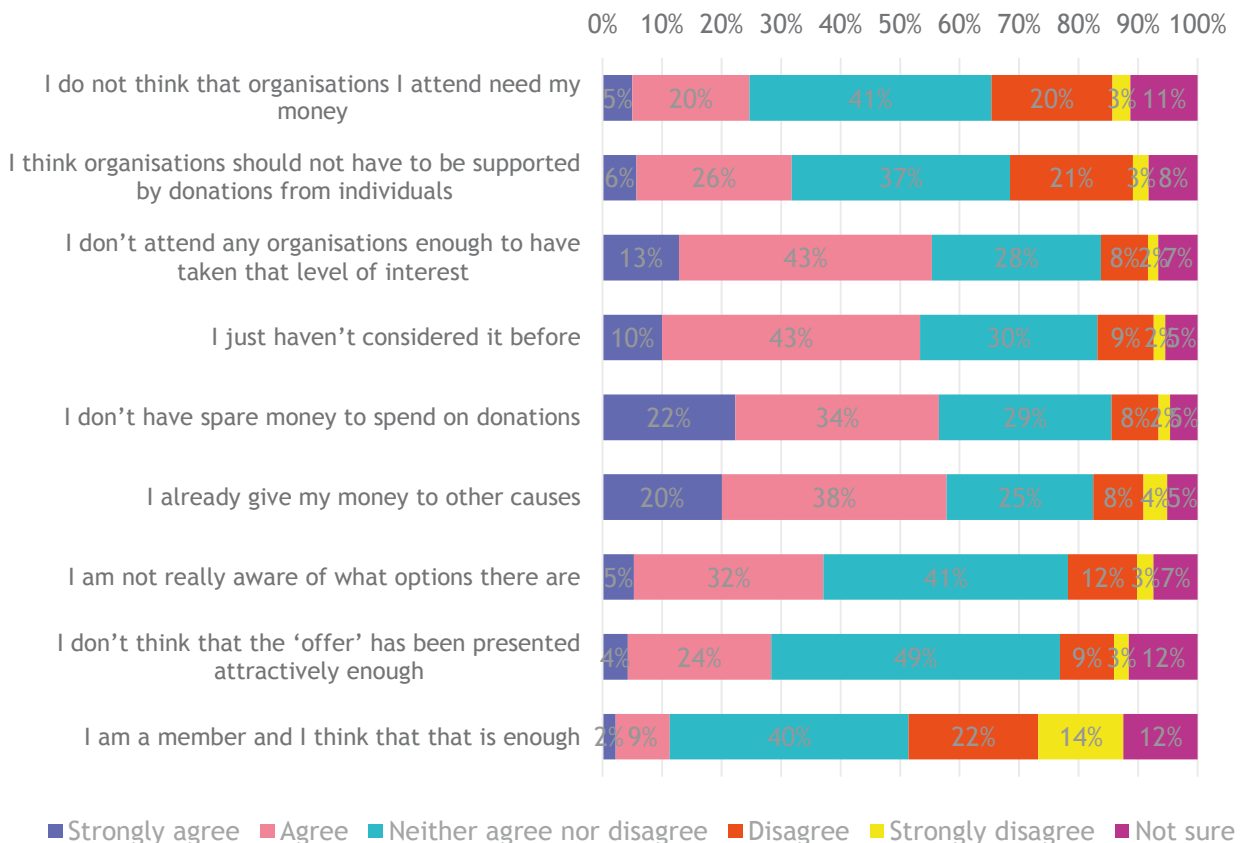


For those individuals that say they have volunteered their time, over half (55%) have done so for no more than one organisation and 70% have first done so in response to a specific ask from the organisation.

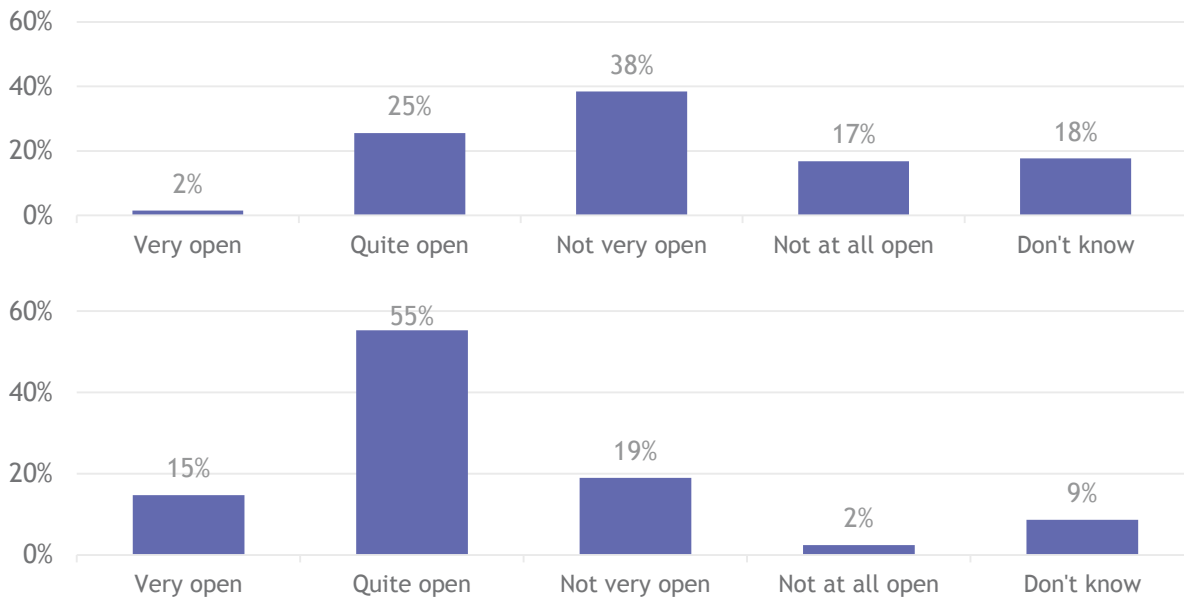




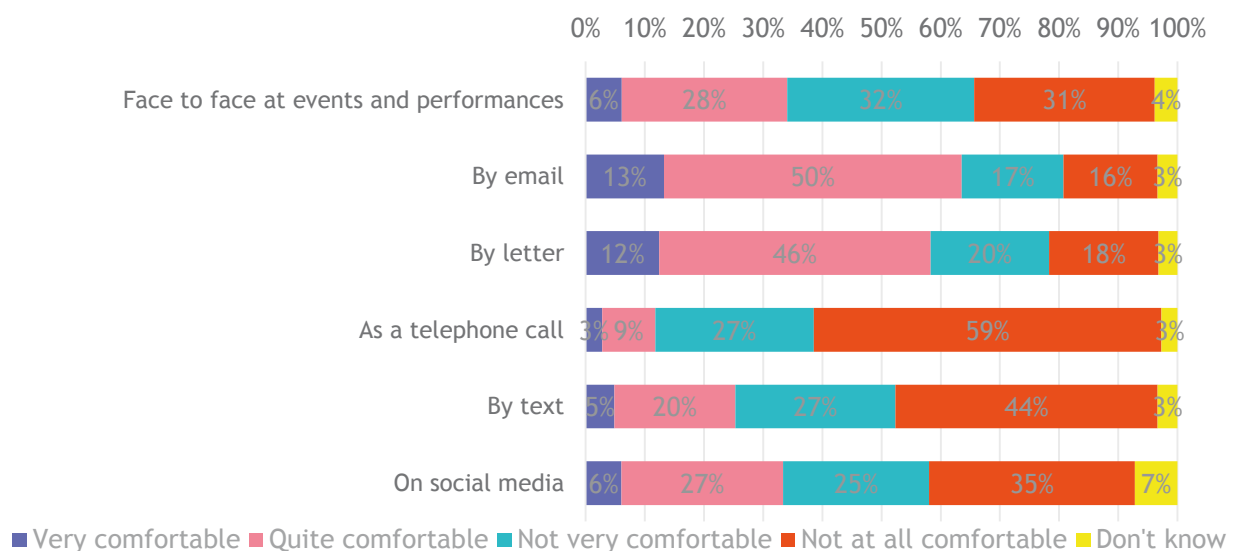
Individuals were also asked about why they may not have donated to the Arts previously - a quarter (25%) don't consider that arts organisations they attend need their money and a third (31%) say that organisations shouldn't be supported by donations from individuals. Interestingly, perceptions of frequency and loyalty may have influenced some responses here, given that more than half (56%) consider that they don't attend regularly enough to take that level of interest. However, just over half (53%) say they haven't even considered the issue. The implication arising from this is that organisations need to specifically communicate their need with potential donors on this issue.



More positively, when asked whether individuals would support the Arts in future, over a quarter (27%) are very, or quite open to doing so, and of those that already donate, two thirds (70%) are very or quite open to donating more in future.



Communication preferences for donation ‘asks’ represent interesting challenges for organisations as individuals say they are very or quite comfortable with the full range of options presented, though email and postal options are unsurprisingly rated highest at 63% and 58% respectively. Over a third (34%) say they are comfortable with face to face asks at events, which for organisations suitably resourced or equipped to do this, may reap rewards. The majority (85%) of respondents however place importance on the need for information on what the donation is to be used for.



Implications

So what are the implications for donor development from this research? What improvements could generate extra income and/or offer deeper public support for the sector? These findings and additional insight articles provide some context and evidence to support our original hypothesis that current and regular audiences do represent best prospects for low level giving and membership asks. We know that donors are likely to have engaged with an organisation at least two to three times a year, many engage more regularly and are not members, so there is much untapped potential for existing audiences to become members and/or donors at low levels.

Members and donors

Donors are more likely to be members or more frequent attenders than non-donors, but members are also more likely to donate (including to organisations at which they are not members); suggesting there is a strong argument for organisations to be making both membership and donation asks of individuals (rather than thinking that one will cannibalise the other).

Many arts and cultural organisations already run friends and membership schemes which are potential opportunities for developing loyalty and relationships. These findings would suggest that while member schemes may not be central to some organisations' income generation strategies, members themselves still represent good prospects for additional donation requests.

The frequency and recency of audience engagement could offer a more targeted approach to donor development strategies, given those audiences with memberships at multiple organisations are even more likely to donate and the pool of donors/members is not just limited to those that attend, as a proportion of donors/members have also been shown not to book.

Our research suggests that the majority of audiences join schemes for the benefits they offer, though individuals may be compelled by a combination of reasons, e.g. they see schemes as a way to support the organisation they attend regularly. The underlying reasons for giving however have changed little over the years and are unlikely to change much in the future. Furthermore, those who already give, continue to do so even if they don't attend, which implies that membership provides a framework for individuals to assist an organisation whose aims they support.

In soliciting additional donations from members there are two key issues to consider:

1. Where schemes are a mechanism for connecting like-minded individuals who are motivated to join because there are social benefits to be generated, e.g. recognition and status enhancement are primary factors; monetary incentives may be secondary and organisations could be losing valuable income by discounting.

2. Where schemes are highly transactional, e.g. priority booking and discounts are key incentives, without which individuals would not join, members may consider donations if they can see the value and need this delivers to the organisation and does not diminish the benefits which can only be obtained by joining a scheme.

Communication

Given that a significant proportion don't perceive themselves to be frequent engagers and appear less regular and culturally confident, how can organisations maximise the value of their donation potential? People in these groups often want more, rather than less information and are interested in context: what is the need and why?

While our research has established that it is possible to create a pyramid of giving characteristics (in terms of how and why people give), there will always be a combination of 'asks' that require a judgement call to be made as to which category the 'ask' falls into. This means that organisations should focus on tailoring messages for audiences that perceive themselves as less regular and engaged, not just the well informed, most frequent attenders.

The fact that audiences do not always see arts organisations as charitable causes underlines the need for a greater level of transparency in communication. This has been evidenced by a previous YouGov poll that revealed only 9% of the population thought public funding for the arts went to companies that were charities (ACE, 2014). So while it is clear that the majority of the general public do not perceive the arts to be made up of mainly charitable organisations, those organisations who are could consider promoting this more visibly and in targeted ways.

Donor profiles

Previous Arts Council England research has demonstrated that a not insignificant proportion of the sector's generated income comes from individual donors. It is clear from our findings that this research provides some insights for organisations in collecting, understanding and managing data to identify member and donor prospects more effectively. The profiles highlighted in our summary and further articles on Audience Finder show that some characteristics, namely age, gender, length of residence, frequency and recency of engagement are important determining criteria in audiences' commitment to give now and in future.

These suggestions represent challenges for some organisations based on the quality and quantity of data they hold about their audiences, members and donors - how and what data is collected and where that data sits in the organisation (the lack of a CRM, or integration with marketing

data and the external management of some box offices being particular issues). While there is little that can be done about anonymous giving channels such as donation boxes and text giving, use of systems that require full address details - tying these back to event/ticketing/booking records - should be encouraged and developed where possible.

What's next?

Our research provides the arts and cultural organisations with useful insights on who donates at a low level and why, there are further articles based on these findings which can be accessed at www.theaudienceagency.org.

Through development of our national dataset we will continue to highlight new insights to develop sectoral knowledge and help evolve good practice. In the meantime, if you wish to find out more about our work in this area, we are launching the following products and services for those organisations with box office, CRM or ticketing systems as part of [Donor Finder](#):

1. Sponsorship Opportunity Report (order now from £250+VAT)

Want to better understand the consumption habits of your audiences? *The Sponsorship Opportunity Report* summarises the lifestyle characteristics and purchasing consumption of your audiences that can be used to attract sponsors to your organisation. To order your report email: research@theaudienceagency.org

2. Membership Predictor (coming soon)

Want to find the best prospects for membership in your database? *Membership Predictor* is an easy to use tool that can help you find the audiences most likely to respond to a membership offer. For more information contact cimeon.ellerton@theaudienceagency.org

For further details on the above report or any aspect of fundraising contact pamela.pfrommer@theaudienceagency.org