



## Survey Indicates Evolving Patron Behaviors In Support of the Arts

While it may be difficult to admit, many arts and culture industry professionals don't have a current understanding of the factors that influence each patron's decision-making process. More specifically, there may be no opportunity to apply resources — time, technology, staffing, and financial — to conduct research on a regular basis. In a perfect world, nonprofits would have the same resources as for-profit businesses to learn more about their patrons, yet this is far from the case.

These points are underscored in a recent survey of U.S. consumers by international consulting firm Accenture that reveals insights into improving patron loyalty. While Accenture is a corporate brand not typically associated with the arts industry — and the survey was limited to 500 consumers — their distinct approach to examining patron behaviors merits attention. Conducted in late 2013, the survey covered consumer attitudes surrounding patronage, financial support and engagement in the arts in 13 U.S. cities with large arts and culture communities.

[Methodology: The survey, conducted by Accenture, was based on an online questionnaire of 500 consumers ages 18 and older in 13 U.S. cities with large art communities: Atlanta, Boston, Chicago, Dallas, Denver, Houston, Los Angeles, Minneapolis/St. Paul, New York City, Philadelphia, San Francisco, Seattle and Washington, D.C. It examined attitudes and behaviors surrounding patronage, financial support and engagement in the arts.]

First among Accenture's findings is an indication that arts organizations should closely examine how they communicate with patrons in an increasingly digital world. Second, the findings confirm that pricing options and flexibility remain a vital part of each patron's decision-making process. The overarching message is a familiar one: understanding the needs of patrons contributes to long-term success.

[The following is a summary. You can also read the full Accenture Technology Vision report [here](#).]

### **The Survey Findings**

In the recent Accenture survey of U.S. consumers, only 35 percent give money to the arts and less than a third are "highly committed" to their local arts organizations. The survey covered consumer attitudes and behaviors in 13 cities with large art communities across the United States. The findings suggest that more pricing options and the convergence of digital technologies to communicate with patrons would increase support for the arts.

The findings support a key trend identified in the Accenture Technology Vision 2013 that organizations that adopt available technologies in social, mobile and analytics to develop digital relationships will be better positioned to take advantage of rapidly shifting business opportunities including improving customer loyalty.

The report found more than half (54 percent) of respondents go to a museum or attend a performing arts event three to four times a year because they “like the exhibit or artist” (72 percent). About 60 percent characterized going to a museum or attending performing arts events as “educational” and 57 percent said they are “passionate” about the arts. Yet, when asked what keeps them away from museums or performing arts events, more than a quarter (29 percent) of respondents said the arts are “too expensive” and 22 percent said they “aren’t top of mind activities.”

When asked what would encourage repeat attendance with arts events/activities, respondents of all ages overwhelmingly preferred different pricing packages (63 percent) while more than a quarter of respondents (28 percent) liked the idea of frequent patron promotions.

“Like any other business, arts organizations need to better understand what motivates their customers as well as how to target more donors and increase customer loyalty to achieve long-term success,” said Elaine Turville, who leads Accenture’s U.S. nonprofit practice. “This survey reveals that to attract and retain customers, many arts organizations need to adapt their business, financial and communication models to better meet the needs of their customers and donors.”

### **Financial Support**

When asked what kind of financial support they make to the arts, 65 percent of respondents don’t make separate donations, aside from the cost of membership and attendance at events. Of that, respondents in Minneapolis (47 percent), New York (46 percent), Washington D.C. (43 percent) and Boston (43 percent) had the largest number of donors. Expense (57 percent) and lack of awareness (27 percent) were the major reasons for not attending fundraisers. These, along with lack of time (42 percent), are cited more often with responders ages 18-25.

Respondents in all age groups said mobile technology can enhance their experience with the arts. In fact, 37 percent of consumers said offering “an app with the latest calendars and exhibit features” would enhance their experience and 31 percent like the idea of arts organizations learning their preferences and suggesting events or exhibits that may interest them.

Respondents preferred technology communication methods ranging from mobile apps and active-learning features to text alerts about special events, which 47 percent of patrons ages 18-25 cited. This age group also strongly preferred more direct communications, like email (63 percent) and social media interaction (33 percent). Half of all respondents said that Facebook is the preferred social media channel to receive information about the arts.

“Similar to so many organizations and businesses today, the arts are looking for new ways to connect with the millennial generation,” said David Wilson, managing director for Accenture’s North America state and local government practice and board member of the Guthrie Theater in Minneapolis. “This survey suggests that embracing new technologies and communications tools is crucial for arts organizations to remain relevant to the next generation of supporters.”

# Building the Next Generation of Arts Supporters

High performance. Delivered.



Just 35% of respondents donate to the arts overall, but the percentage varied widely by city.

Less than **one-third** of respondents are highly committed to local arts organizations.

In the 18-25 age group, just **17%** are highly committed.



How many times per year do you go the museum, and/or attend the performing arts?



**54%**  
Four or more times per year



**32%**  
Two or three times per year



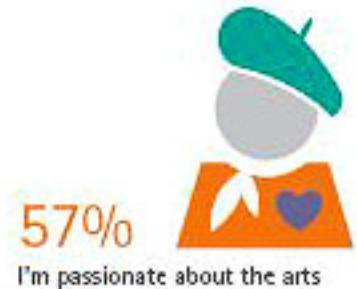
**12%**  
Once per year



**20%**  
Never



Why do you go to the museum, or attend the performing arts?



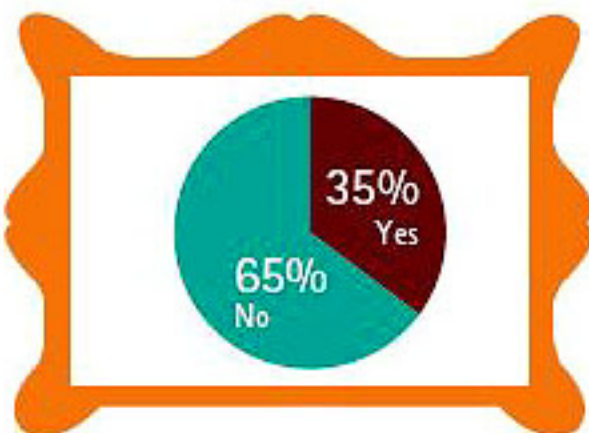
Why haven't you been to a museum or attended the performing arts within the past two years?



What can arts organizations do to encourage your repeated attendance?

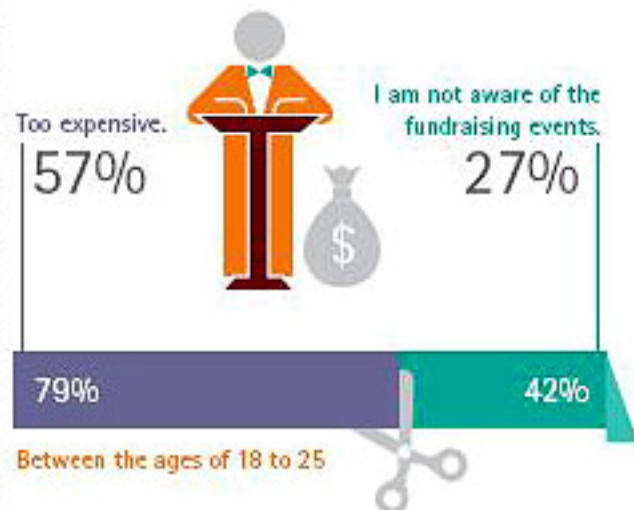


Do you donate money to any museum or performing arts organization aside from the cost of membership and events?

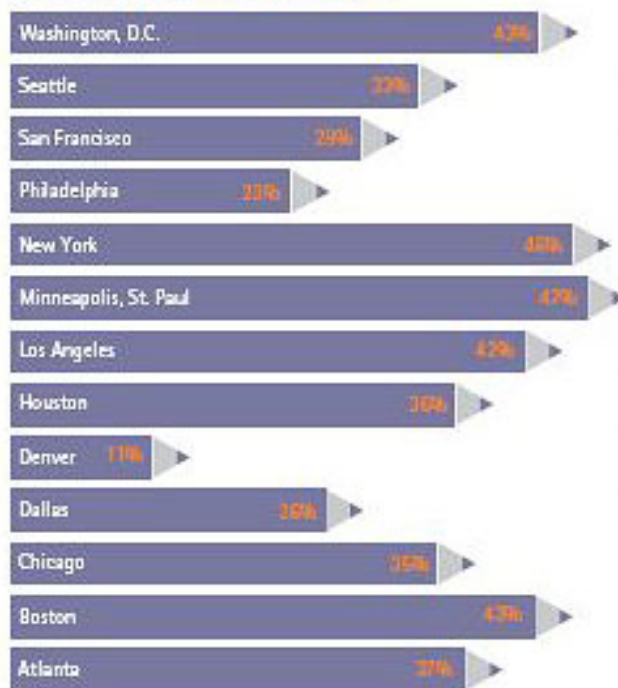


Percentage who donate by metro area

Why don't you attend fundraising events on behalf of a museum and/or performing arts organization?



Percentage who donate by metro area



How can the use of technology by your local arts organization enhance your experience for performances and/or visits?

Offer an app with the latest calendars and exhibit features.

Arts organizations can 'learn' my preferences and suggest events that might interest me.



Between the ages of 18 to 25

How would you like the arts organizations that you patronize to communicate with you after you attend events?

Between the ages of 18 to 25



63%

Email



33%

Social media



What social media sites would you like to use to follow your local arts organizations?



50%

Facebook



44%

I do not follow any arts organizations on social media



27%

Other social media sites, e.g. Twitter, Pinterest & Instagram

**About Accenture**

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