What's next for New York audiences?

Insights from MHM's 2021 Audience Atlas New York

November 2021 report

What’s next for New York audiences?

In July 2021, Morris Hargreaves McIntyre undertook a new comprehensive study of cultural engagement in the New York Metro area: **Audience Atlas New York**.

It maps the market’s **past, recent and future propensity to engage** with a wide range of art forms, leisure activities, and cultural organizations. It also explores their attitudes, media habits and **decision-making** processes for engaging with culture.

This report summarizes key findings from the study. We also aim to address some **key concerns and questions** regarding the sector post-pandemic.

Interested in finding out more?

This report gives you an overview of our market findings, but if you are looking for more, we would be happy to discuss our research with you and answer any questions you may have.

We also collected data on some specific organizations and can therefore analyze the findings through the unique lens of your specific market. Please contact us for more information regarding customized reporting and pricing.

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Audience Atlas New York

This report shares the key findings from MHM's 2021 **Audience Atlas New York**.

After the challenges of the past year, our goal is to freely share the findings from our research, and provide **valuable insights** to help the sector **plan for the future**.

A complete picture of the market

Our Audience Atlas survey covered the **whole market**. We wanted the voices of *everyone* to be heard, rather than just those who are already engaged with your organizations. Our data includes those who might already be in your database, or on your mailing list, but it also includes people who might never have heard of you at all.

Robust data, accurate representation

Using a trusted partner panel company, we sampled 2500 adults in the **New York metropolitan area**. We set quotas and used weighting to ensure the sample was demographically representative of the overall population. We did this by age, gender, educational attainment, race or ethnicity group, and geographic region within the metro area.

Aiming to consider 'what's next?'

We conducted the Audience Atlas survey in June 2021. After 14 months of the pandemic, we wanted to acknowledge its impact, but also focus on the future. Our study explored some of the key issues that had been raised in conversations with our friends and clients in cultural organizations when thinking about 'what's next?'.

Three burning questions we heard most often in conversation with cultural organizations:

1. How can we reach a more diverse audience?

2. What is the future of digital?

3. How can we ensure sustainable financial support?

We'd like to thank the New York Philharmonic as our partners in this study.

What we did

Sample: In June 2021, we work with a trusted panel company to survey 2,500 residents of 23 counties in the New York metropolitan area.

Any data is only as good as the sample from which it's drawn. We built our sample frame based on census data for the area, so we could be confident we targeted a representative sample of the whole market. We set interlocked sample quotas based on age, gender, race/ethnicity, and educational attainment.

Survey design: The 20 minute survey included questions covering many topics including:

- Participation in different leisure, art, and cultural activities
- The institutions they have heard of and engaged with
- The kinds of experiences people are most looking forward to returning to
- Thoughts around digital content
- Cultural spending
- Interest in, and motivations to, supporting art and cultural organizations

Analysis: Once the data was collected, we weighted the survey responses to ensure the data was representative across demographic groups. We analyzed, interrogated, and interpreted the data to identify key findings and insights.

Terminology:

Current market: Those who have attended in the past three years
Lapsed market: Those who have previously attended but not in the past three years
Potential market: Those who have never attended but expressed interest in doing so in the future
Rejectors: Those who have no interest in attending.

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2. What is the future of digital?

3. How can we ensure sustainable financial support?

Art is universal, institutions are not

Art is universal, institutions are not

The market for cultural activity is **wide and diverse**, but many institutions are simply not connecting with some audience groups.

Making all audiences feel welcome and represented is important, and the outcomes culture can deliver are universal. Psychographic segmentation can help you effectively target audiences in any demographic group.

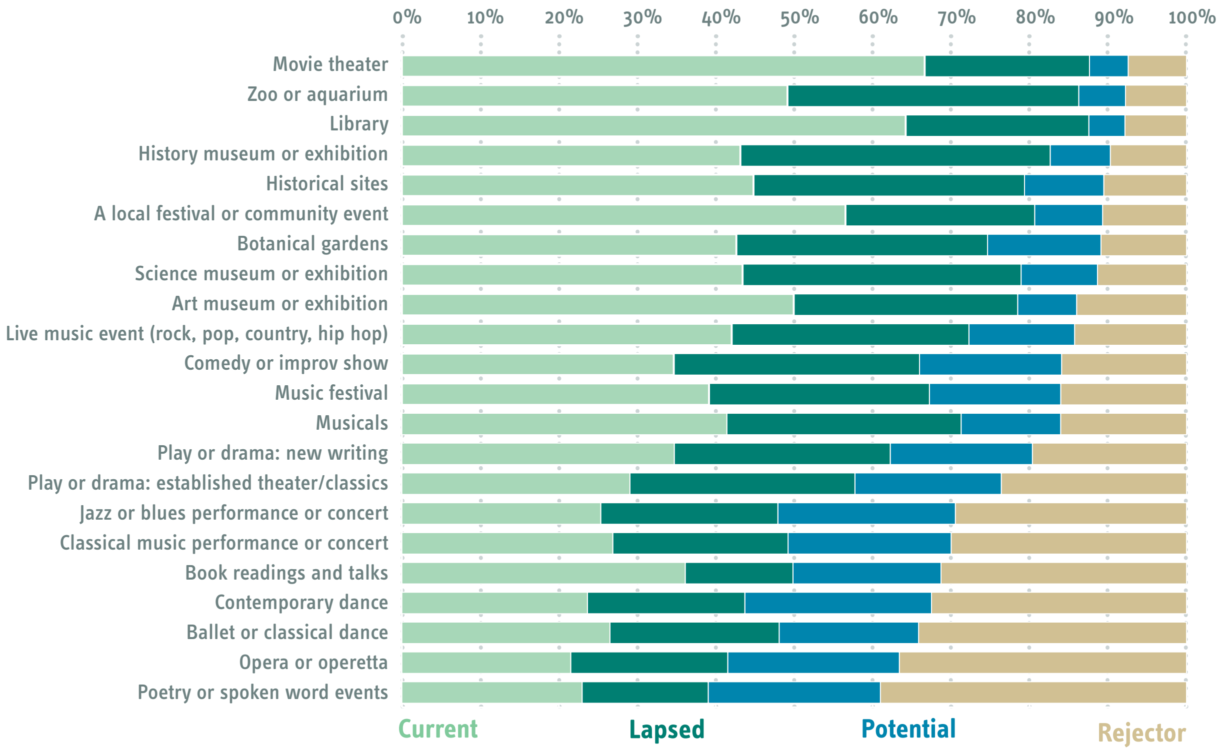
The market for culture is bigger than you may expect

The markets for all artforms is large - just under nine in ten of the New York population are in the market for a history, science or art museum or exhibition. This means that they have either engaged with one of these artforms in the past (current and lapsed) or they are interested in doing so in the future (potential).

Some artforms (such as movie theaters and zoos), have limited room for growth. But other artforms (such as classical music, dance and opera) have a lot more growth potential.

But in all cases, there are more people interested in the cultural offer than might be expected.

Artform markets in New York area



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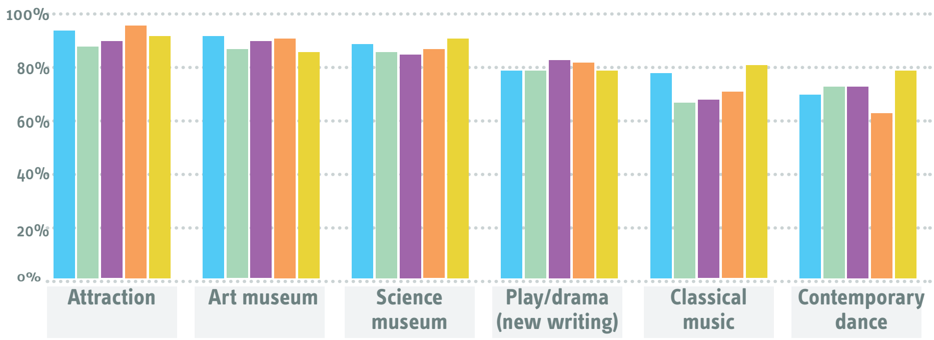
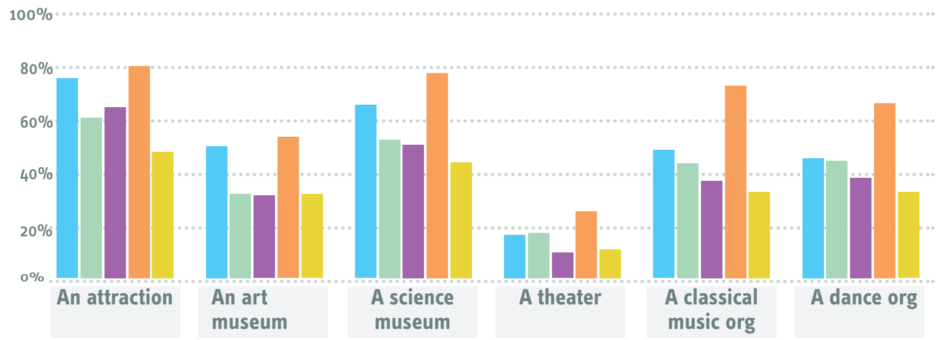
Market size: % of the population in the market for different artforms by race or ethnicity group



Institution awareness: % of the population aware of specific institions by race or ethnicity group



Asian or Asian American

Black or African American

Hispanic or Latino/a/x

White or Caucasian

Another identity

And it's just as diverse as the population

The market for each artform is very similar. When we look at the demographic makeup of each market, we can see that the most are representative of the population by race or ethnicity group.

There is also little difference when we look at age groups – there are similar interest levels for younger and older age groups.

This tells us that the age or ethnicity of a person doesn't make any difference to what they might be interest in attending.

The problem with inclusivity lies in connecting at an institutional level

But that doesn't mean that inclusively and diversity is not an issue.

The area where we saw the most stark differences by ethnicity and age was in awareness of institutions.

Awareness of institutions increases with age

All institutions, across the board saw much higher awareness as age increased. This can be explained in part, as older audiences have had more time to get to know more organizations. However, that does not address the issue of engaging younger people. Organizations cannot wait for people to become older to get on to their radar.

Black of African American audiences had lower awareness of organizations

The same was also true for ethnicity. There are some significant differences in awareness between different ethnic groups.

In particular, Black or African American audiences were significantly less likely to be aware of most institutions than white audiences.

The problem therefore lies with the institutions themselves.

There are many reasons to choose to engage

The opportunity to try something new was the most common reason to engage with a cultural institution, exhibition or performance. This was chosen by just under half of the market (48%).

But social reasons are important too: attending somewhere the whole family could enjoy and have good experiences was important to around four in ten.

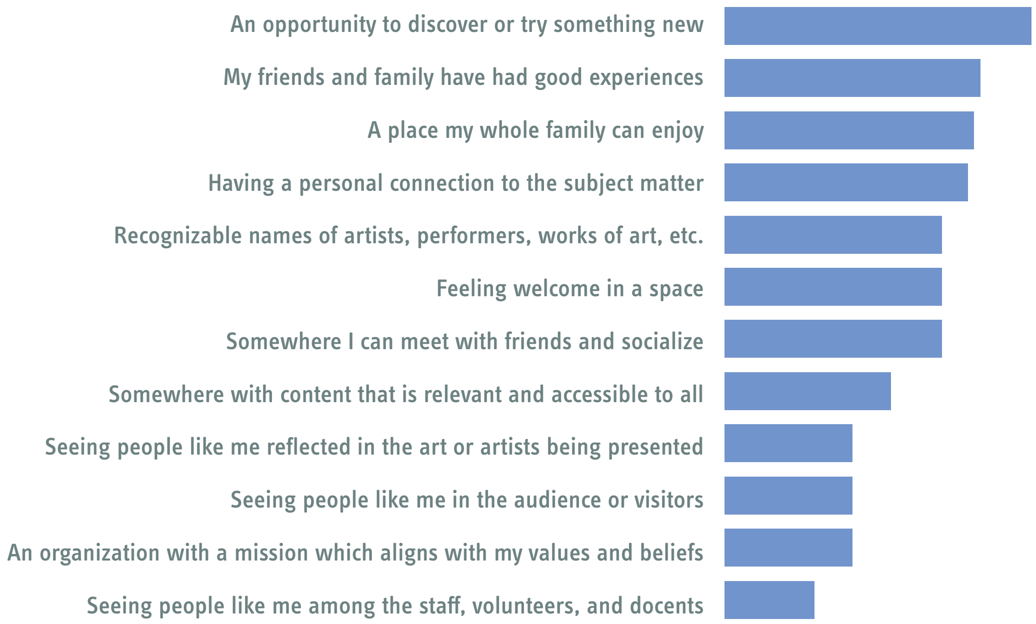
A welcoming, social space to meet friends is important

Having a personal connection to the subject matter was more important to the oldest (65+) age group in particular (44% vs 38% overall).

Feeling welcome, having a place to meet and socialize with friends, and being able to recognize the names of artists, performers and works of art were all important to around one third of the market (34% each).

Institutions therefore need to consider whether they are providing all of these factors for everyone, or just for those who are already attending. Consider welcome in every sense of the word: Does it mean different things to different people?

Which, if any, of the following factors contributes to your interest in attending a particular exhibition, performance, or cultural institution?



Young audiences prioritize welcome and representation

We also looked at these priorities through the lens of what mattered most to some specific audience groups; groups that most institutions aren't currently connecting with.

There are some factors that increase in importance when we look specifically at young people. Those under 35 are more likely to want to 'see people like me' in artists, audiences and staff.

The values of an institution are also more important to this age group (x% vs x% for over 35 year olds).

Black or African American audiences do too

This is also true of audiences who identify as Black or African American. Representation in staff, volunteers and docents was important to around one quarter (25%) of this cohort (vs 14% overall).

This was less important however to other ethnic groups, such as those identifying as Hispanic or Latinx (17%) or Asian (9%).

But the outcomes we can deliver are universal

Recommendations, representation or even a personal connection may be fundamental factors in deciding where to visit and what to choose. But they aren't necessarily reasons to visit in and of themselves.

The top *motivations* for visiting a cultural institution (the thing you want to gain, what you look forward to) were to enjoy quality time with friends or family (32%) and for fun, joy and laughter (30%) .

And when we look at these motivations across different groups, by age or by race or ethnicity groups, there aren't many significant differences – these are universal truths of course. Who doesn't want joy?

But it's also worth noting that a range of outcomes were chosen – your audience are looking for a lot of things from the experience you have to offer.

Reasons to engage by age

Factors that contribute to interest	Under 35s	Over 55s
My friends and family have had good experiences	44%	40%
Feeling welcome in a space	40%	34%
Seeing people like me reflected in the art or artists	27%	20%
Seeing people like me in the audience or visitors	26%	20%
An organization with a mission that aligns with my beliefs	24%	20%
Seeing people like me among the staff, volunteers etc	22%	14%

Just a selection of the outcomes audiences are seeking when they engage with culture:

Quality time with family and friends (32%)

Fun, joy and laughter (30%)

To experience something different (23%)

To learn new things (20%)

Stimulating my imagination (19%)

Awe, wonder and food for the soul (16%)

So the question is how do we create meaningful messaging for audiences when they want so many different things?

A number of key segments to target

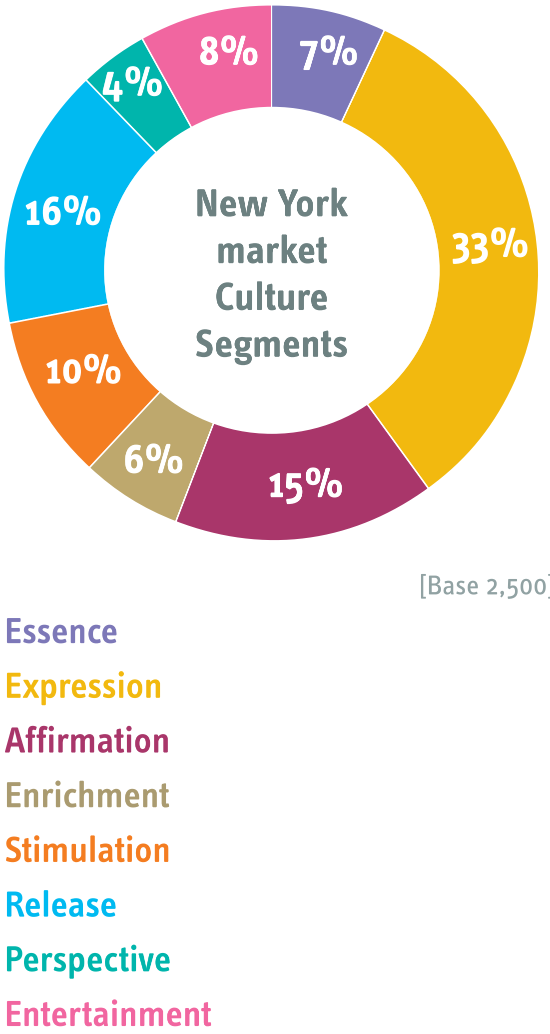
Culture Segments gives you real insight into what motivates people to engage with culture – it's a powerful tool when it comes to communicating with audiences. The right messaging will attract someone and engage them deeply with what you do.

Expression make up one third of the market for culture

Expression are the "people" people. They're in tune with their creative side, they're fun-loving and see culture as a way of broadening horizons.

They are driven by the desire to connect to other people and share experiences. They think culture is for everyone and like to see cultural organizations being inclusive and welcoming.

They seek emotional outcomes – they want to be made to feel, to empathize, to be moved, to understand someone's story.



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Introducing Culture Segments

Culture Segments is a universal, sector-specific psychographic segmentation system for arts, culture and heritage organizations. It is based on values – each segment is defined by what they seek when engaging with culture and the needs they want to fulfil – from intellectual stimulation to human connection to pure fun.

The principal objective of Culture Segments is to provide the sector with a shared language for understanding audiences, with a view to targeting them more accurately, engaging them more deeply, building relationships and maximizing loyalty.

We've identified eight segments in the market for arts, culture and heritage. They are based on people's core cultural values, giving insight into why each segment would like art and culture in their lives, what benefits they have to offer, and how they feel their lives will be improved by it.

To find out your segment:

www.mhminsight.com/segmentme

Release is the second largest segment

Release are the segment who just feel they don't have enough time on their hands. They want to engage with culture more, but they are balancing conflicting priorities and sometimes the perceived stress of culture puts them off. With so many options available in New York it's easy to see how Release might be overwhelmed. To target this segment offer escapism – a chance to take a break from the everyday. But their time is precious, so make it easy for them, and be clear it's THE thing to do.

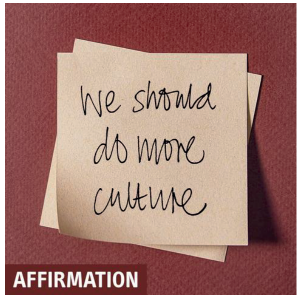
Affirmation account for 15%

Affirmation account for 15% of the New York market. This segment are conscientious and considered – they see cultural activity as a form of self-improvement, a chance to learn as well as have fun. They want to make the right decisions and get the most they can from the experience.

People in this segment do their research and make informed choices – they rely on reviews and recommendations. Give them the information they are looking for in order to plan properly and demonstrate exactly what they'll gain.

Discerning
Confident
Independent
Arts-essential

Community
Nurturing
Generous
Committed



Self identity
Considered
Diligent
Time well spent

Active
Experimental
Ideas
Social

Tradition
History and heritage
Nostalgic
Learning

Settled
Self-sufficient
Focused
Contented

Busy
Prioritizing
Ambitious
Escape

Mainstream
Popular appeal
Leisure
Fun

One in ten New Yorkers are Stimulation

Stimulation are all about 'the big idea.' They are an active group who love adventure and live for the moment. They seek out new experiences to live a varied life. 'Do something different' is Stimulation's maxim for life. They like to be ahead of the curve, they want to discover new things and are happy to take risks.

Make it clear to Stimulation they don't want to miss out, they'll make a discovery, learn a secret, or try something unexpected.

Essence are small but active

Essence make up just 7% of the market but it's likely they are responsible for much more than 7% of ticket buying. They consider the arts and culture essential to their lives and are therefore very active.

Culture is their way of exploring the world and reflecting on meaning. They want to gain deeply emotional connections, and they will experience them with or without others.

They are very knowledgeable about art and culture and resist obvious forms of marketing. They just need to what is happening when (and crucially: will it be of the highest quality?), and they'll be there.

Culture segments translates across demographics...

Culture Segments is psychographic – it's based on what people seek when they engage. It therefore applies across all demographics factors – all of the segments exist across all ages, races and backgrounds. There is no one segment to target to reach young audiences or to connect with Asian audiences, because all people with the same demographic characteristics don't think alike.

...And can help you find ways to resonate with the audiences you are missing

But segmented messaging can help you create communications that will resonate with your key segments, across any age or race.

We saw earlier that when it comes to reaching younger and more diverse audiences, awareness is the first hurdle; we need to get on the radar of people with whom we currently have no connection.

Part of this equation is channel: where are you placing communications and who is it reaching? But the other key element is resonance – what's the message that might cut through the noise?

Audience Atlas data can highlight what segments are most prominent in your current, lapsed and potential markets. It can also tell you what segments are likely to be unaware of your institution, and even what segments are largest among the young people who have not heard of you.

For example, what if Expression and Stimulation were the largest segments amongst young, unaware audiences? A bold campaign which lets them know they are missing something – that you are there to be discovered – would work well to grab Stimulation's attention. But there would still need to be embedded messaging around shared experiences, connection and emotional outcomes for Expression.

Recommendations

Consider how and where you message – and who it is designed for. Increasing awareness, not through large brand campaigns but thinking smartly about reaching the people you are not, is essential

Think about your welcome – in every sense of the meaning. Feeling welcome is a space – and seeing themselves represented – may be more important to people you might not be reaching. Welcome might mean something different too.

Bring a little joy – we all need it right now and that is universal.

And use Culture Segment messaging to really resonate and cut through the noise. We want to be for everyone, but trying to appeal to everyone all at once often doesn't work, think about the segment that will have the most impact for you.

Three burning questions we heard most often in conversation with cultural organizations:

1. How can we reach a more diverse audience?

2. What is the future of digital?

3. How can we ensure sustainable financial support?

It's here to stay. We need to cultivate an audience

We need to cultivate a digital audience

The majority of the market have accessed digital content this year – with a strong skew towards younger audiences.

There isn't huge growth opportunity for digital market but the appetite to continue engaging, both digitally and in person, is there, and it can be monetized with the right strategy.

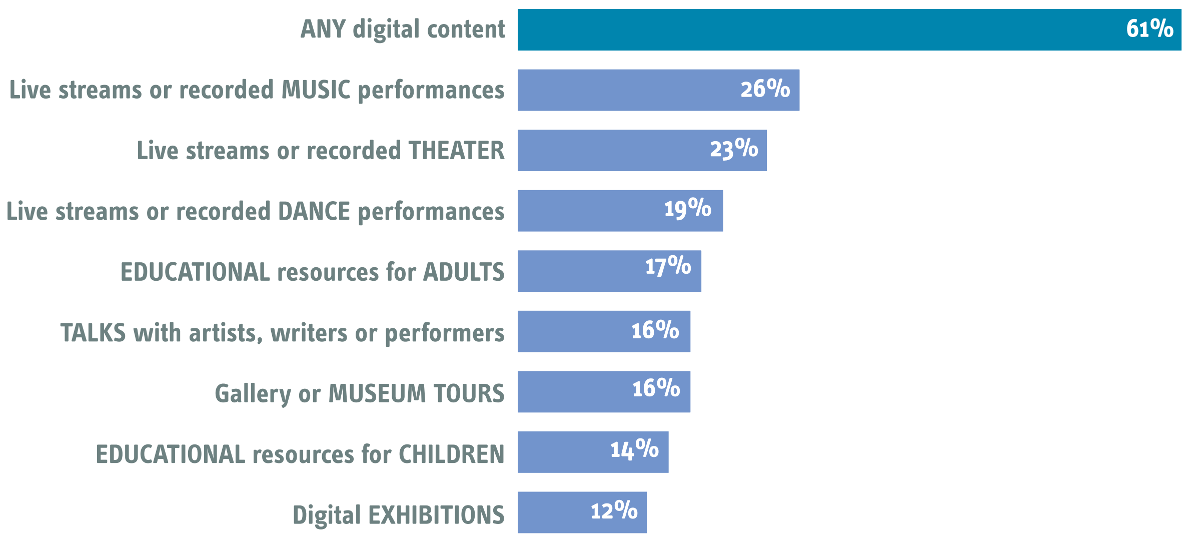
Performances have been most popular

Around six in ten people in the market (61%) have engaged in at least one type of digital activity related to cultural institutions.

Within that, live or recorded music performances have been the most popular, at 26%, followed by live or recorded theatre (23%), and dance (19%).

Museums tours and digital exhibitions – the kinds of content that might have less direct human connection – seem to have generally been less popular.

In the past 12 months, what types of digital content, if any, have you watched, accessed or interacted with from cultural institutions?



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Most people have tried two types of content

There isn't a huge amount of crossover in the types of content the New York market has engaged with. On average, those who have engaged in some way have tried 2.1 different categories. Despite the huge wealth of types of content available over the last 18 months, audiences haven't been out sampling all the different types.

There is a generation gap on digital culture

Younger audiences are significantly more likely to have engaged digitally. More than eight in ten 18 to 24 year olds in the market (84%) have engaged with at least one form of digital content from cultural organizations, compared with 35% of the 65+ age group. There appears to be a generation gap around the 45 to 54 year old age group.

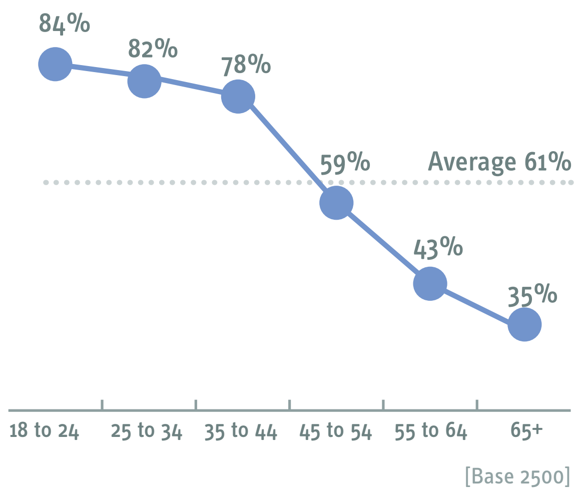
Educational attainment also determines levels of digital engagement

As well as age, educational attainment also appears to determine whether or not someone engages digitally with a cultural organization. Those with higher levels of education are more likely to have engaged than those with lower levels (74% vs 53%).

Those identifying as Black or African American were more likely to engage

Similarly, audiences who identify as Black or African American are more likely to have engaged digitally. Just under seven in ten (69%) had engaged digitally with at least one type of digital content, compared with 55% of those identifying as White.

% of the population who have engaged with any digital content from cultural organizations by age



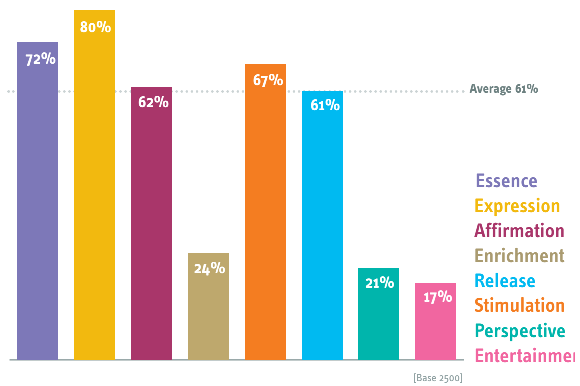
Expression have done it all

Expression are the segment most likely to have engaged digitally. Eight in ten have engaged with at least one form of digital content and they have higher engagement with most types of digital content when compared with other segments.

High proportions of Essence have also engaged with digital (72%). Previous research has highlighted that this segment have been very active in engaging with digital content, but are less satisfied with it than others. For Essence it's not a replacement for the 'real thing'.

Stimulation, Affirmation and Release are all on, or above, average in their digital consumption. Release are the least adventurous segment in terms of different types of activity – only 20% have done two or more types compared to 35% on average. This makes sense, as Release are a time-poor segment; they want to make it count, so tend not to take risks on the unknown.

% of the population who have engaged with any digital content from cultural organizations by Culture Segment



There is limited growth in the market for digital

Around 7 in 10 (71%) would be interested in engaging in digital content in the future. This is a 10 percentage point increase on those who have already engaged.

There is room for growth but it isn't huge. Most of the people who want to engage in some way with digital content have already done so in the last 18 months.

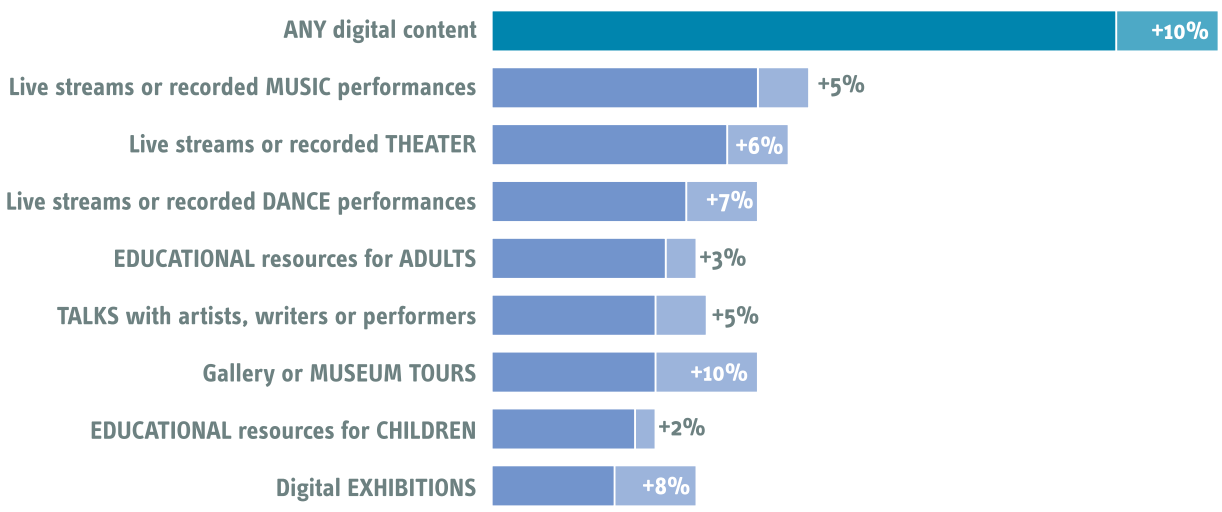
But the appetite does remain

But this doesn't mean there is limited opportunity for further engagement – there is plenty of interest for continuing to engage with digital. All types of content saw interest in future engagement increase compared to past engagement – even if only by a small margin.

A break in the short term is perhaps needed

But in the short term, it's absolutely fine to focus on re-opening, and returning to live events. Half the market agreed that they want to take a break from digital content when venues first re-open.

What types of digital content, if any, would you watch or interact with from cultural institutions in the future?



But there is continued appetite for a mix of experiences

41% agreed that they'd like experiences that combine digital and physical aspects in the future. Those in the 25 to 34 age group were most likely to be interested, and those 65+ were least likely.

Expression were the segment most interested in combining digital and physical experiences. Stimulation – who like adventure and novelty – and Affirmation – who like to get the most from an experience – were also more likely than average to agree. So there is evidence that thinking about hybrid experiences could be valuable.

50% of the market agreed they want to take a break from digital when venues first re-open

41% agreed they'd like to have experiences that combine the digital and physical in the future

Less than half of the active digital audience have paid for it

Understanding if people are interested in digital is only part of the picture, particularly when thinking about future strategies. We also need understanding what value they place on it. Are they willing to pay for the content? And therefore can it be an ongoing income stream?

We saw earlier that 61% of the population had engaged with digital content in some form. Within that, 29% had paid for content at least once, while 32% had only engaged with freely available content.

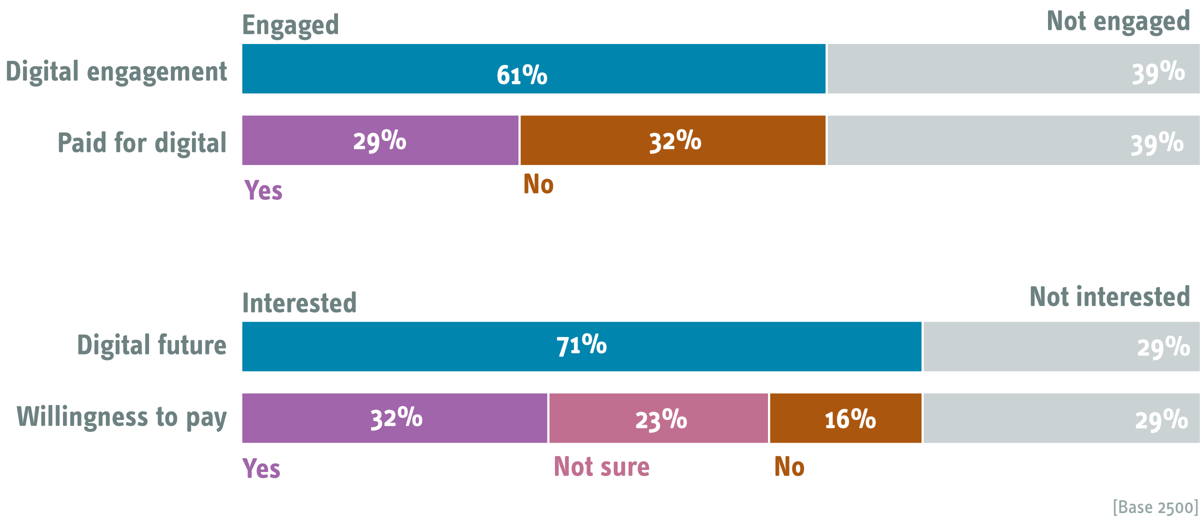
Younger audiences – as well as being more likely to engaged with digital overall – have been much more likely to have paid for content (for example, 57% of 25-34s).

Essence are less likely to have paid for digital

The Essence segment, despite being highly active digitally, was less likely than the other active segments to report having paid for content. While Essence see art and culture as essential, they seem to place less value on digital experiences.

Expression, in contrast, were the segment most likely to have paid for content.

Paying for digital content: past behavior and future likelihood



But more are potentially open to paying in the future

32% of the market said they would be willing to pay for digital content in the future – a limited increase on those who have already paid in the past. However a further 23% said they were 'not sure'. A quarter of the market could be persuaded to pay for digital but we need to demonstrate the value.

Virtual concerts can charge the most

When asked what maximum price they would pay for different types of digital content, virtual music performances showed the highest possible price points.

Recommended price points for different types of digital content:

Music performance: $15-29

Theater performance $15-19

Talk $10-14

Digital exhibition $15-19

Recommendations

Think about your long terms plans – build an audience slowly and be sure it's the worth the investment you're putting in. Know your plan and know your strategy

Consider how digital could connect with younger audiences particularly – but it might not be way in for those new. Digital culture looks like a great way to deepen relationships with your institution or artform. Look to bring new and exciting experiences to those already onboard with digital

Enjoy getting back to in person right now – people do still have a bit of screen fatigue. Audiences are mainly looking for quality time with friends and family right now and digital is not best placed for this.

But then explore combining digital and physical events or experiences. The second most sought outcome from earlier, that people want from culture in general, was fun, joy and laughter. This is absolutely something digital can provide, and hybrid experiences are well placed for this.

Finally, communicate the benefits – make the case to audiences for why it's worth spending.

Three burning questions we heard most often in conversation with cultural organizations:

1. How can we reach a more diverse audience?

2. What is the future of digital?

3. How can we ensure sustainable financial support?

Diversity and sustainability go together. We need to create community.

We need to create community

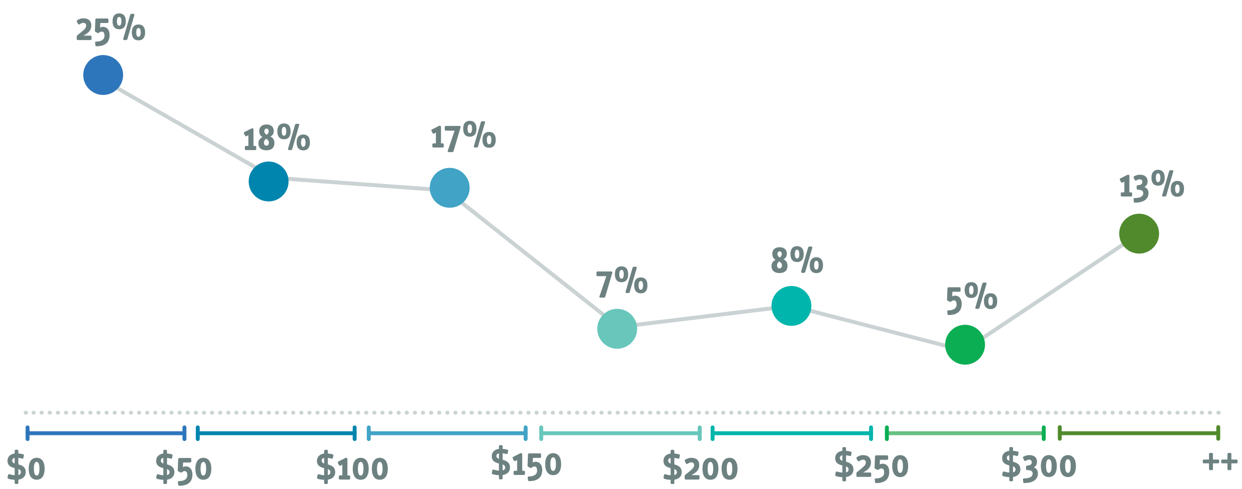
Spend is varied across the market. Older, wealthy and White audiences are higher spenders but Black or African American and Hispanic or Latinx audience are looking to spend more in the future.

Audiences donate or join for a range of reasons, but it is **long-term relationships** and a **sense of belonging** that ensure a **connection** beyond the transactional.

A wide variety of spend pre-pandemic

We asked about spend on cultural activity (not including movies) in a normal year pre-pandemic. We saw a range of responses, as expected. The largest proportion of people (25%) spend less than $50 on culture in a year. In terms of how much cultural activity is on offer in New York, this isn't a lot. Although people are interested in a wide range of artforms, they are discerning about what they actually spend.

% annual spend on admission to/tickets for cultural institutions in different price brackets (pre pandemic)



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57% of the market estimated they spent more than $100 per year on cultural activities and institutions per year (before the pandemic)

Looking at demographic factors: older audiences tended to spend more than younger audiences, and perhaps unsurprisingly, people with higher income levels and higher levels of educations also tended to spend more.

Black and Latinx audiences have been lower spenders to date...

White-identifying audiences also spent more than any other race or ethnicity group, while Black or African American audiences and Hispanic or Latinx audiences were the groups least likely to spend over $100 per year on cultural institutions (49% and 50% respectively).

...But plan to spend more in the future

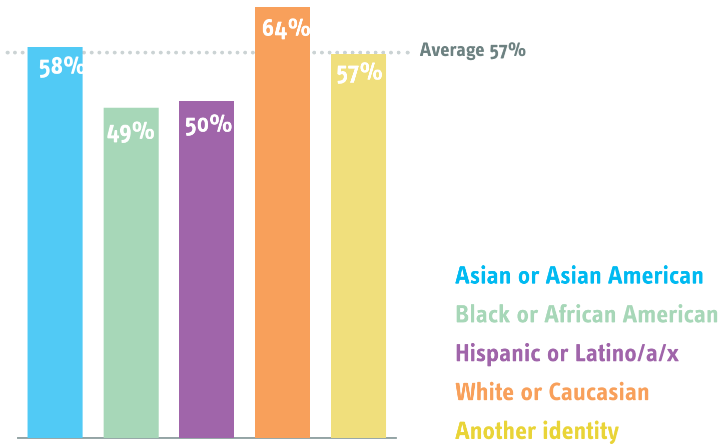
We also asked about the future – post-pandemic, how do people imagine their spending on culture will change?

Black/African American audiences and Hispanic or Latinx audiences were more likely than average to say they would like to, or plan to, spend more on cultural activities or institutions in the future.

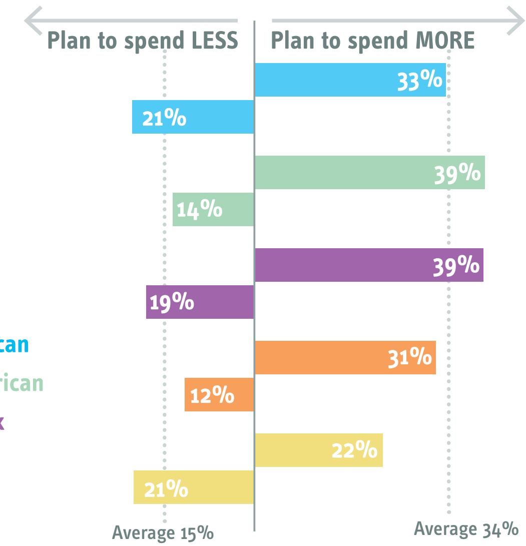
So there is a clear opportunity to form relationships with more diverse audiences, to increase attendance and in turn increase spend.

Diversifying audiences is essential to ensure you are reaching and reflecting your communities, but it's also financially smart in terms of long-term sustainability.

% of the population who have spent more than $100 on cultural events and visits by race or ethnicity group



% of the population who plan to spend MORE/LESS on culture post-pandemic by race or ethnicity group



A third of the NY market have donated to a cultural institution

We asked about supporting cultural institutions: 35% of the New York culture market say that they have donated to a museum, theater, or other cultural institution in the past.

43% reported that they had been a Member of a cultural institution/attraction (excluding public libraries).

Similar to spend, those with higher levels of income were more likely to have made a donation than those earning under $75k.

35%

of the New York Culture market say that they **have donated** to a museum, theater, or other cultural institution

43%

reported that they **had been a member** of a cultural institution/attraction (excluding public libraries)

Younger audiences and People of Color are more likely to have donated in some form

However, younger audiences were more likely than older audiences to say they had made a donation to a cultural organization in the past three years.

White audiences were less likely than every other race or ethnicity group to have donated. Those who identified as Black or African American were the most likely to have made a donation.

It's worth noting, this doesn't take into account value: we don't know how much they donated. But it does evidence that the opportunity for institutions to diversify their supporter base is there.

We noted earlier that awareness was lower amongst younger audiences and amongst Black or African American, and Hispanic or Latinx audiences in particular. Making those connections now can build a more diverse and sustainable supporter community in future.

Reasons to support a cultural organization

Factors the contribute to interest	Average	25 to 34	65+
Helping keep artists and staff employed	30%	33%	24%
Supporting an organization in my community	28%	30%	24%
Supporting an organization I visit frequently	28%	32%	23%
Supporting a strong mission that aligns with my beliefs	27%	32% ↑	18% ↓
Seeing what my support can do to help an organization	27%	33% ↑	17% ↓
The benefits supporting can bring such as tickets, access	23%	32% ↑	14% ↓
Being able to share the work of an organization with others	16%	23% ↑	7% ↓

Close physical connection motivates support

We wanted to understand what motivates people to donate or join memberships. The top three reasons were pretty fundamental:

1. helping keep artist and staff employed – very much top of mind over that last year certainly;
2. 'supporting somewhere in my community'; and
3. 'supporting a place I visit often' – both showing a strong connection in terms of visiting somewhere, being physically close.

Expression are more likely than average to select all the options. Essence were less interested in places in their community – they follow the art and quality they appreciate wherever it is.

But younger audiences seem to want to support for personal connection

But if we look at this by age, we do see some interesting patterns. The top three reasons we saw earlier were consistent across age brackets but the remaining four were much more important to younger audiences.

For example, this group were more likely to want to support organizations with a strong mission that aligns with their beliefs, or see what their support can do to help – they want to form a deeper, more personal connection, outside of just visiting regularly.

Even split on Membership renewal during pandemic

Another question we wanted to explore was: How are people responding to cultural memberships in the context of the pandemic? We saw a fairly even balance between those who reported letting memberships expire while institutions were closed (33%) and those who reporting making the choice to renew even while an institution was closed (32%).

(Note: these two statements are not mutually exclusive – one individual could have done both with different institutions – and there are other options such as memberships being put on pause by institutions).

'Because COVID won't go on forever but our need for art will...'

We wanted to understand what influenced those decisions – what made someone continue supporting even when there was nothing in it for them? The big picture was that they understand the value of art and the impact it has on the world.

32%

chose to renew even though the cultural institution they were a member of remained closed

33%

chose to let their membership expire because of the pandemic closures

Audience understood the need was still there

There is an understanding of how things work amongst some audiences – they understand that the organization being closed does not mean a break in costs.

It does show the value in building that knowledge amongst your supporters about how their funds are used and how critical their support is.

'The staff and bills still need to be to be paid. All members were needed to step up so the organization can survive.'

'I renewed my membership to the Bronx zoo because the animals and staff still need to be supported.'

For some, it's a lifelong relationship

For many of those who had been members for a long time, this period was just a short blip in a long-standing relationship, there was no need to consider cancelling.

'I have supported for more than 40 years because of the joy they have provided me in my life.'

'I have been a lifelong member since I was a little girl.'

And crucially, they feel a sense of belonging

But the final reason we saw frequently mentioned was much more about an emotional connection: a feeling of belonging. This is a goal for all cultural organizations to strive for – to create belonging amongst a wide and diverse group, and build a community that helps people feel they are part of something, to ensure sustainability.

'It's a place where I feel like I belong and it fits my ideas.'

'I am committed to support something I believe in, that shares my values…'

'Because I feel I belong to them.'

Recommendations

Invest in diversifying audiences – aside from anything else, it's good business in the long run.

Think about how to reach next generation of supporters – by connecting to issues bigger than ourselves. The things that are on peoples minds.

Focus on building belonging amongst membership – it's the best way to ensure you'll retain members even if transactional benefits aren't available.

Morris Hargreaves McIntyre is an international consultancy.

We work with charities, heritage and cultural organizations of all sizes.

We're fascinated by what makes people and organizations tick.

Our strategic thinking, insight and creativity transform how our clients see their world.

Our clients use our work to connect more people, more deeply, with their causes, fuelling their success.