Washington, DC market for culture

Actionable market data to fuel your plans now, and post-pandemic

February 2021

morris hargreaves mcintyre

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In November of 2020, Morris Hargreaves McIntyre undertook a new comprehensive study of cultural engagement of the Washington, DC area, also known as an Audience Atlas survey. It maps people's past, recent and future propensity to engage with a wide range of art forms, leisure activities, and cultural organizations.

The study will give organizations a clear picture of their local markets, as well as insights into how best to reach and connect with potential audiences.

We also address critical concerns and questions the sector is currently facing in these challenging times.

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 Washington, DC

This report shares the key findings from MHM's 2020 Audience Atlas Washington, DC. 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 picture of the whole market

With the pandemic having a devastating impact on DC's overseas and domestic tourism, we knew that local audiences from local communities would be more important than ever in sustaining DC's cultural organizations. Therefore, our Audience Atlas survey covered the **whole market**. We wanted the voices of *everyone* in DC and Baltimore to be heard, rather than just those who are already engaged with your organizations. Our sample was selected using rigorous quotas to ensure that this study was fully demographically representative.

To help focus efforts on what matters

The culture sector has been one of the hardest-hit industries during this global pandemic. Budgets are tight and resources are stretched. It's completely crucial, therefore, that audience development efforts are focused in the right places, and that marketing decisions are made efficiently, effectively, and at the right time. **Reliable data** is essential, and Audience Atlas DC provides it, giving you the evidence you need to make those critical immediate decisions that inform sustainable longer-term strategies.

With deeper, powerful insights

Culture Segments, MHM's psychographic profiling system, is embedded in the Audience Atlas data, adding a rich layer of depth and insight into audiences' values and motivations and giving you the tools you need to reach, connect with, and influence them (see pages 11-12 for more detail).

Six ways to use data in planning

The study was designed to give insight into into the six critical areas that will help you re-engage audiences post-pandemic. This report is designed to be a practical, accessible tool and is structured to provide clear data and actionable insights in each area, to help you move forward.

1. Know the size and make-up of your local market

To begin, it's important to step back and consider the basic questions: what's the size of the market for your offer, and how often are people engaging with you? This will tell you where and on whom you should be focusing your marketing efforts.

2. Understand what really motivates audiences

Knowing who is in your market only shows you part of the picture. Understanding people's motivations for consuming arts and culture can help you better target different segments of people in effective and strategic ways. All our data can be analysed through the Culture Segments lens to give this understanding.

3. Listen to their pressing concerns

The COVID-19 pandemic has had a undeniable impact on the arts and culture industry. As you begin to reopen your spaces in a post-pandemic climate, we know that safety is everyone's top priority. It is important to understand what impact the pandemic has had on the market's attitudes and motivations as well as what are their safety concerns. You can make plans to address these issues and make people feel welcome and comfortable in your spaces and at your events.

4. Focus on how to inspire them

Safety is essential, but it isn't a reason to visit. Understanding what kinds of experiences potential audiences are seeking right now, and therefore what might inspire them to choose your institution, is key. We need to know what they are excited about or craving, to help craft messaging and programming that inspires people to visit or buy a ticket.

5. Use digital content wisely

The pandemic has shown how valuable a tool digital content is and can be. Over the last year, we've seen a huge amount of new and innovative content from cultural institutions that can be enjoyed from the comfort of our own homes. Moving forward, it's important to understand the lasting interest in this type of content, and how organizations can continue to leverage it to its fullest potential.

6. Consider what 'support' from audiences means

Due to prolonged periods of closure, many organizations are facing tough financial futures. Knowing how and in what way people want to support you will be vital. It can also help you cultivate deeper relationships that can create longer lasting support.

What we did

Sample: In November and December of 2020, we partnered with two panel companies to survey 1,599 residents of 27 counties in the Washington DC and Baltimore metropolitan areas.

Any data is only as good as the sample from which its 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
- Effects of COVID-19 on people's lives and interest in attending different types art and cultural activities in the future
- The kinds of experiences people are most looking forward to returning to
- Thoughts around digital content
- Interest in supporting art and cultural organizations

Analysis: Once the data was collected, we weighted the survey responses to ensure representation across demographic groups and thoroughly investigated the full dataset. We analysed, 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.

1. Know the size and make-up of your local market

Cultural activities are a big part of people's lives

Museums and attractions are high on the list of ways to spend time

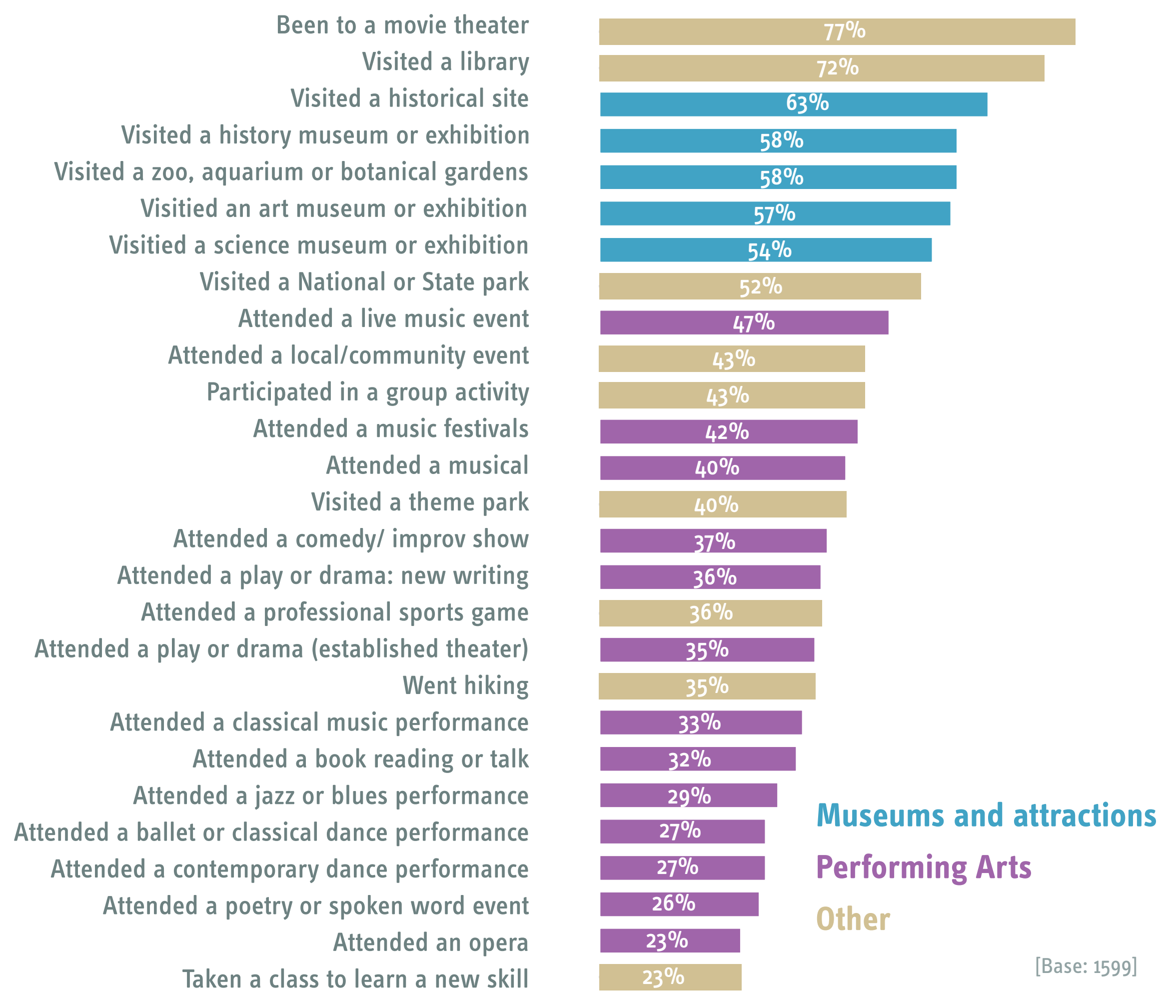
To establish the wider picture of how the market chooses to spend their leisure time, e asked, from a variety of activities, which respondents had done in the last three years (what we consider the 'current' market). Unsurprisingly, movie theaters topped the list, followed closely by libraries.

The current markets for several different kinds of museums and attractions are the next largest, and are similar in size to the market for visiting a national or state park. This high level of interest and visitation to museums and attractions shows that they are a key component of how the Washington DC population spend their time.

Performing arts market is comparable with sport or theme parks

Whilst the current market for performing arts is smaller than it is for museums and attractions, attending live music events is a big part of nearly half of people's lives, and going to music festivals, musicals and theater performances is as popular as taking in a professional ball game or visiting a theme park.

Participation in leisure activities in the past 3 years for the DC market



Museum & attraction visits are close to universal

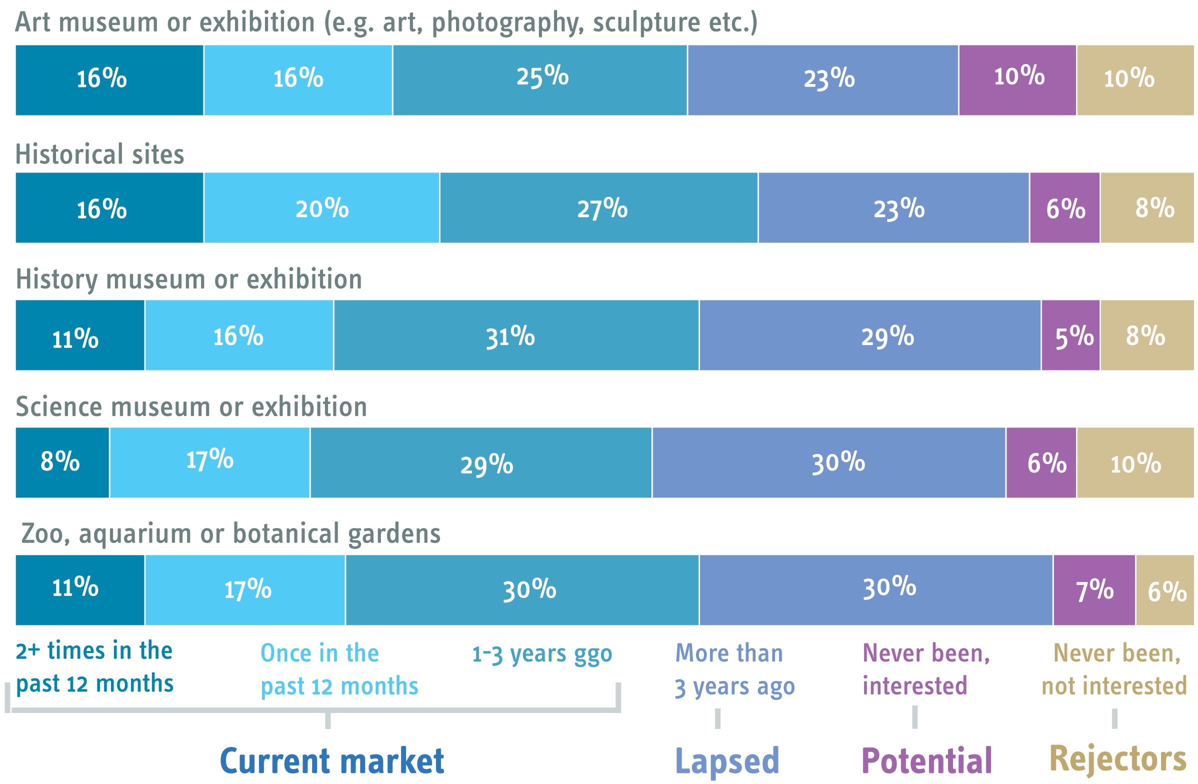
Majority are in the current market for museums and attractions

Looking closer at the markets for museums and attractions, over four fifths of those surveyed had *ever* been to each of the different types tested. Almost 90% have engaged with a history museum or historical site (art museums or exhibitions are slightly less popular with 80% having visited).

Furthermore, over half the adult population in Washington DC have visited art museums, historical sites or museums, science museums, and zoos in the past three years. This indicates a consistently large interest in these types of institutions, and that the market is broadly familiar with the experience.

You don't have to convince people that museums and attractions are worthwhile: they already know, as they are already visiting! Instead, focus on what makes *your* offer unique - what specific benefits can you provide visitors?

Market for museums and attractions



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Focus on re-engaging visitors

Persuading new visitors into museums for the first time is certainly a worthwhile activity, but in the short-term we recommend focusing your efforts on reengaging active museum visitors. There are plenty of them, so invite people back with a clear, enticing offer. Focus on convincing them that your particular organization is the one they should visit, highlighting the specific social, intellectual or emotional benefits you can offer. With the dip in tourism due to the pandemic, focusing on those current and lapsed markets in your area is even more important than ever.

But for performing arts, there is more room to grow

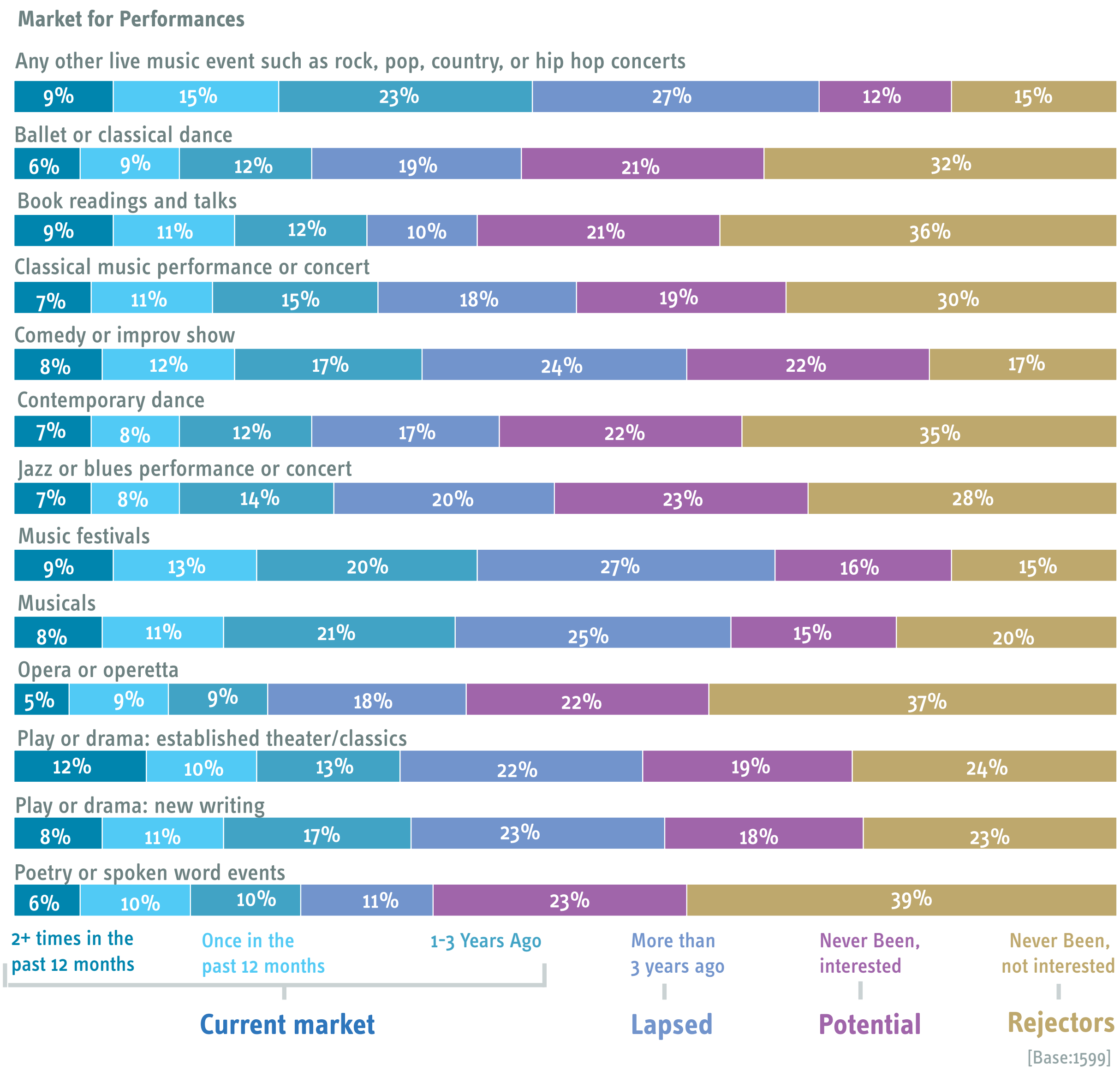
Potential markets for performing arts are larger – new audiences to reach

Unlike museums and attractions, the performing arts market is more varied. Current markets are smaller (between 23% and 47%) and some art forms show relatively high levels of rejectors (never been, not interested). The good news, however, is that the potential market for performing arts is much larger than for museums and attractions. There is scope to reach brand new people.

Although poetry or spoken word events, opera and book readings/talks have the largest proportion of rejectors, all three have a large potential market, meaning there is a lot of people who simply have not been but are open to attending. They're waiting for you to entice them!

Give people a new opportunity

For many performing arts, there is opportunity to draw new people in. As you'll see later in this report, 'trying' or 'learning' something new is a key driver right now, making this the perfect opportunity to persuade people to take the risk and give it a shot. Push outside of your normal channels to reach different people.



2. Understand what really motivates audiences

Introduction to Culture Segments

Culture Segments gives you real **insight** into what **motivates** your audiences - insight that gives you the tools your need to engage them more deeply.

Culture Segments is a **universal, sector-specific psychographic segmentation system** for arts, culture, and heritage organizations.

The principal objective of Culture Segments is to really **understand audiences**, and what motivates them, with a view to targeting them more accurately, **engaging** them **more deeply**, **building relationships,** and maximizing loyalty.

Meet the segments

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.

The defining characteristics of the eight Culture Segments are:

Essence

Discerning, Confident, Independent, Arts essential

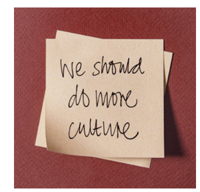
Essence consider the arts and culture essential to their very being. They're confident and knowledgeable and look for deeply emotional connections. High quality culture is their primary concern and they veer away from the mainstream, considering it unsophisticated.

Expression

Community, Nurturing, Generous, Committed

Expression are open and full of enthusiasm with varied and eclectic tastes. They enjoy activities that help them connect with and share experiences with others. They like to be sure that everyone is welcome to join in and enjoy things, and as such put a high price on inclusivity.

Affirmation



Learning, Considered and Diligent, Time well spent

Affirmation make considered, measured decisions, seeking endorsement before making choices. One of many leisure options, they embrace culture as important and worthwhile – it's part of their commitment to personal well-being. They recognise opportunities for self-improvement as well as for quality time with others and like to build memories of these special experiences.

Enrichment

Tradition, History and heritage, Nostalgic, Learning

Enrichment tend to be lovers of history – things that have stood the test of time command their respect. They know what they enjoy, are independently-minded and exert their right to be cautious. It's not that new things hold no worth, but Enrichment will look for the thread that links them to what went before.

Stimulation

Active, Experimental, Ideas, Social

Stimulation are an active group who love adventure and live for the moment. They seek out new experiences to live a varied life and keep ahead of the curve. They are all about big ideas and are looking for something 'out of the ordinary'. But they also attend cultural events for the social experience.

Release

Busy, Prioritizing, Ambitious, Escape

Release are looking to escape and unwind from the stresses of everyday life. They can feel a little under siege from different pressures on their time. These conflicts may be reality, but often it is the feeling of being time-poor rather than the actual reality of not having any time. They'd like to go to more, but it isn't always easy.

Perspective

Self-sufficient, Focused, Reflective, Fulfilled

Perspective are very self-sufficient and don't rely on others for fulfilment. They prefer to make their own discoveries and are happy doing their own thing, driven by their own agenda. They focus on one or two existing interests they find satisfying and rewarding and have a low appetite for expanding this repertoire.

Entertainment

Mainstream, Popular culture, Leisure, Fun

Entertainment tend to see culture as being on the periphery of their lives. Their occasional visits are likely to be for mainstream events or days out. Leisure time is for fun, entertainment and escapism, not intellectual stretch. If they do attend it will be socially motivated but their engagement is typically among the lowest of all segments.

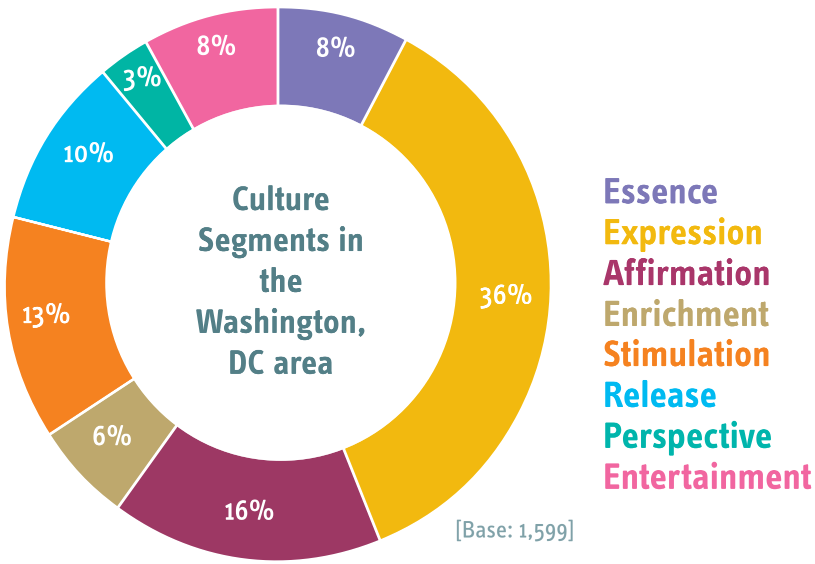
Expression are the largest segment in DC

Expression are a third of the market

Expression is the largest segment in the Washington, DC area at 36% of the whole market. This is great news for arts and cultural institutions as Expression is one of the segments most likely to visit arts and cultural institutions on a regular basis. They are also likely to join in and share their experiences, so can be great advocates.

Affirmation (16%) is the next largest segment in the market – a segment keen on learning and self-improvement but who can be a little cautious – followed by Stimulation (13%) who are looking for discovery - something new and unique with clear hook.

Essence accounts for just 8% of the market, but as very active cultural attenders they will likely be responsible for a higher proportion of visits to cultural institutions.



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Consider Expression as a priority

As Expression are not only the largest segment in the DC area but also the most active culture attendees, it is clear this segment has huge potential for all institutions.

They enjoy activities that help them connect with and share experiences with others, although during the pandemic they want to do this safely. They are community-minded and put a high price on inclusivity . They like to be sure that everyone is welcome to enjoy the benefits of engaging.

Demographics vs Culture Segments

There is very little difference in the Culture Segment profile of the whole market when compared to specific demographics. Culture Segments is a universal system that profiles people using their deep-seated values and motivations rather than their age, gender, or race/ethnicity. That being said, there are other factors that contribute to different demographic groups having different needs that influences how they engage, which we'll explore more in the coming pages.

Use Culture Segments strategies to drive visits

Expression bring their children to cultural institutions

Those in the Expression segment are more likely to bring children to cultural institutions than any other segment, 68% compared to 52% average for the overall market. If you have programming specifically for children, by focusing your marketing on the Expression segment, you are more likely to reach the people you want resulting in a higher ROI.

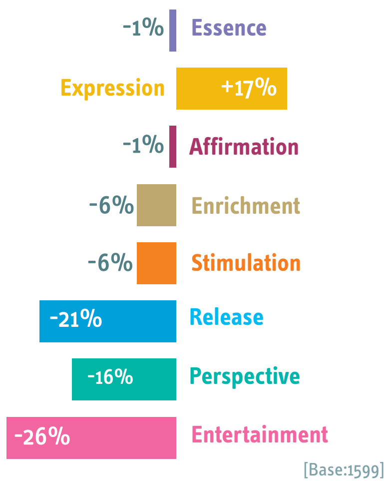
Affirmation and Essence show a stronger interest in ballet

Expression over-index significantly in the current market for ballet. Affirmation also over-index slightly in having been but are even more prevalent in the potential market for ballet as well as Essence. Therefore, if you're a ballet company wanting to grow audiences, think about these two segment's needs. You need to invite them as well as reassure them that your offer will be both accessible and worthwhile for those who are interested.

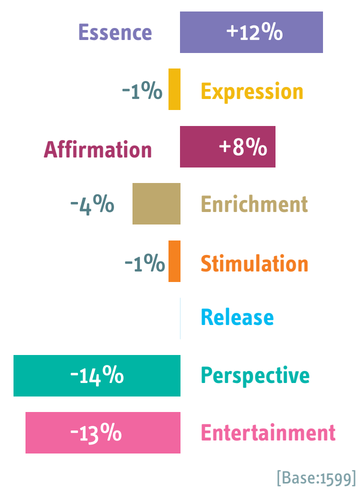
Essence are interested in poetry/ spoken word

Essence, confident active attenders, don't show always show up in potential markets as they've already tried everything they wanted, but they are in the poetry/spoken word potential market. In order to grow your audience for these types of events, Essence will be a good place to start. Appeal to their knowledge and confidence in cultural attendance.

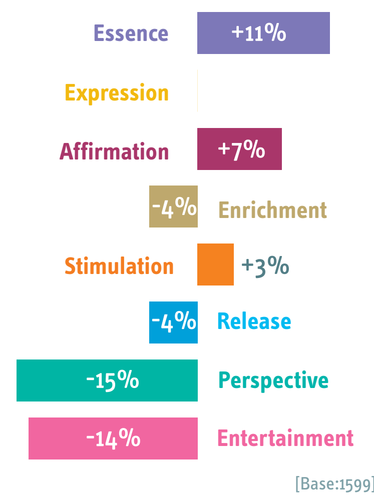
Likely to bring children under 18 to cultural institutions compared the market average



Potential market for ballet by Cultural Segment



Potential market for Poetry or spoken word compared the the overall market



For information on how to target each of these segments as well as examples, visit our website at mhminsight.com/culture-segments.

3. Listen to their pressing concerns

Financial concerns are prevalent

Over half the market have had, or are worried about, financial concerns

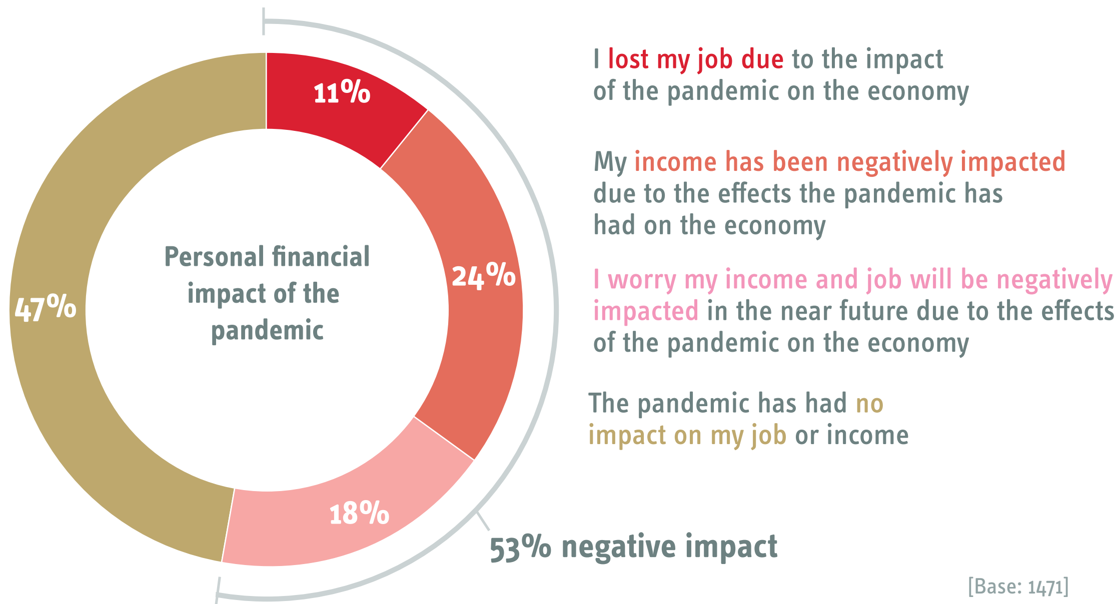
The impact of the pandemic has been felt by many people in different ways, both personally and financially. 53% of the market reported having had, or being worried about, a negative financial impact. Within that, 11% had lost their job due to the impact of the pandemic.

But while the pandemic may be universal, these negative impacts aren't experienced equally across the market. Young people are suffering disproportionately: 30% of 18-24 year olds have experienced heightened worries about their incomes, 17% of 25-34 year olds have lost their jobs, and two thirds of all those 34 and under have been negatively impacted by the pandemic or lockdown conditions.

Those who identify as Hispanic or Latinx are also statistically more likely to be concerned about their income than average.

Personal circumstances impact on ability to return and what they need from you

Almost a third of respondents are in a high-risk group and 1 in 5 are caring for or living with someone in a high-risk group. Predictably, age does play a factor here, with those 55 or older significantly more likely to be in a high risk group.



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Around 53% of people have found it easy to follow all the restrictions and rules put in place during the pandemic, meaning 47% have struggled, and culture can offer relief from stressful times. While all individual circumstances are different, it's useful to consider what these factors will mean in terms of what the local market wants and needs from cultural institutions. Finances are obviously a huge concern for many; what do you offer that can make audiences feel like what you have is worth the money? Or what can you offer that is low cost or free to help people during this time in order to build loyalty long-term.

53% have found it easy to follow the rules and restrictions

31% of the market are in a high-risk group

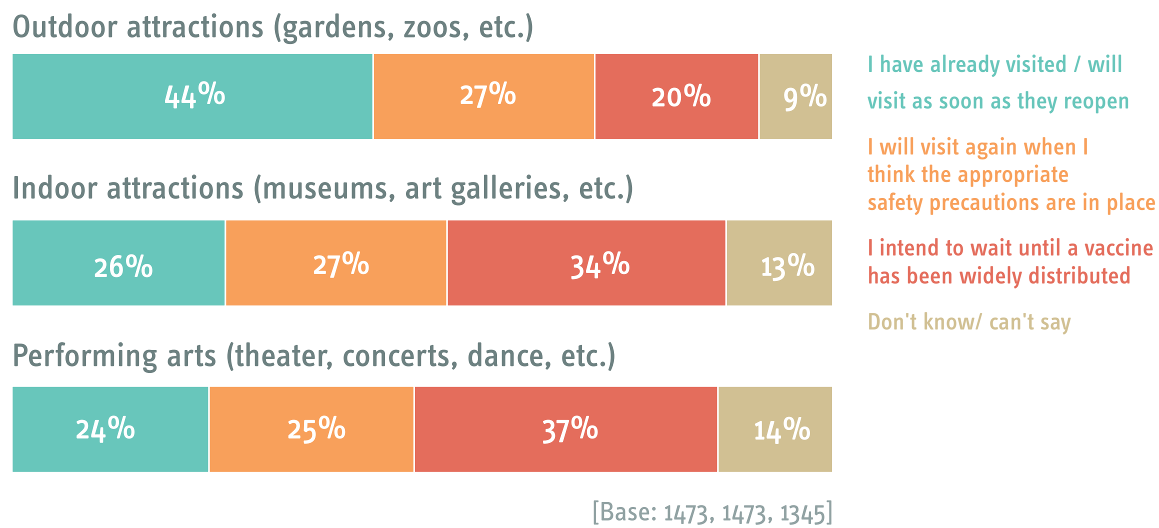
20% are caring for someone in a high-risk group

Hesitancy to return to indoor and performing activities

Audiences are most comfortable with outdoor attractions

When asking about returning to cultural and leisure activities, it is understandable that more people feel safe visiting outdoor attractions – 44% of people have either already been or are poised to visit as soon as they are open next. This compares to 26% for indoor activities and 24% for performing arts.

Around a quarter are a little more cautious, and will only visit again when they feel appropriate safety measures are in place. This group may need some convincing once you reopen that you are safe.



There isn't a large difference between audience's willingness to return to different indoor activities

Only 20% of the market reported they plan to wait until vaccines* are widely distributed before returning to outdoor activities, however this increases to 34% for indoor attractions and 37% for performing arts.

The market is slightly more inclined to visit indoor attractions than performing arts but the difference is not significant.

The sector has widely expected the comfort level around returning to museums to be significantly higher for performing arts, but it is worth noting that audiences have similar attitudes around both.

Plan for a tiered return

People's level of comfort in returning is varied and your reopening campaigns should address that. For the immediate reopening, focus on the group that are itching to return and tap into their excitement, but there may be an initial first wave and then slow build back, even with reduced capacity. Those waiting for a vaccine will need more time, but don't ignore them once you are open. Continue to communicate with them and reassure them you are there when they are ready, or continue to highlight any digital content.

*At the time of our survey, no vaccines had been approved for wide distribution within the US.

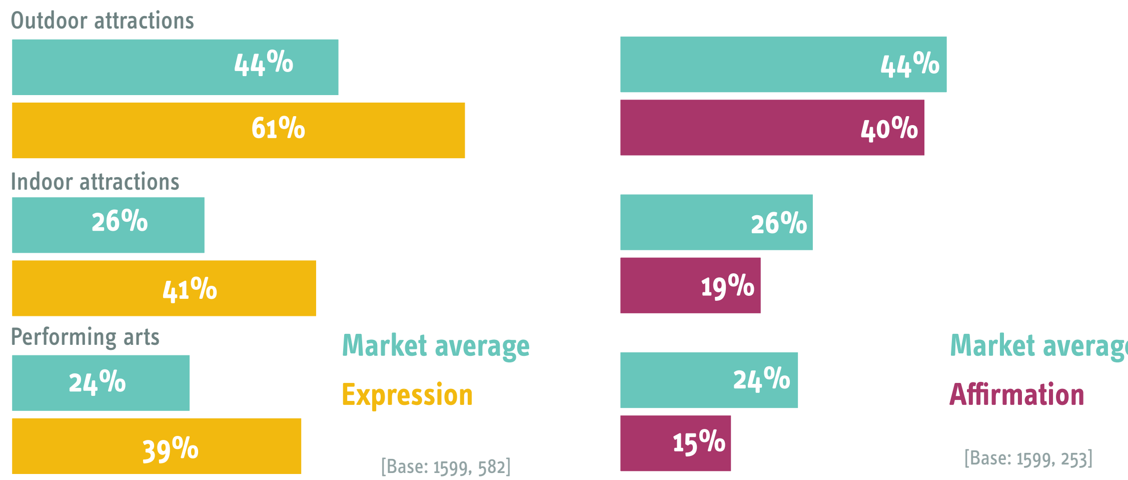
Expression is the segment most ready to return

Expression will be the first through your doors

Those in the Expression segment are significantly more likely to have already returned or be interested in returning as soon as possible for all three different types of venues tested.

Over half have already been to outdoor attractions or will as soon as they are able. 41% are ready to visit indoor attractions when they can, and 39% are ready to return to performing arts. Expression are also significantly more likely to return when they feel its safe to both indoor attractions and performing arts, instead of waiting for the vaccine to be fully distributed.

Have already visited cultural institutions/ will visit as soon as they reopen



Conversely, Affirmation will wait

Affirmation are more cautious in general, so it is no surprise that they are less likely than average to be ready to visit or have already visited cultural attractions. Although this is the second largest segment for the area, they'll take time and a lot of reassurance to return.

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Focus on appealing to Expression, but continue to reassure Affirmation

For re-opening campaigns think Expression for messaging – a chance to (safely) get back to shared experiences and connect to other people through art.

But don't ignore Affirmation; continue to reassure and build their confidence. Affirmation are a generally cautious segment who want to know exactly what to expect (when to arrive, where to go, how to engage). Dial this up even further alongside safety information so that Affirmation don't feel overwhelmed.

Start your reopening campaigns focusing on Expression, and then move to Affirmation.

Enforcement of safety measures is the biggest concern

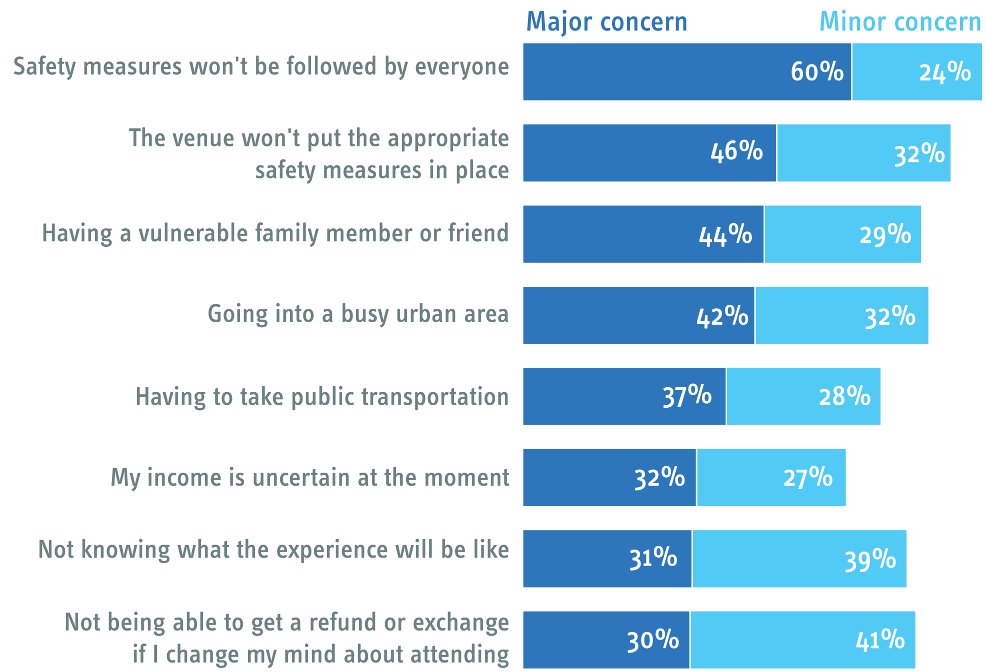
When it comes to safety concerns when making a visit to a cultural institution, it is clear that concern over safety measures being followed by everyone is it at the top of the list. 84% of respondents said it was a concern, with 60% selecting a major concern.

The second highest concern reported was that venues won't put the appropriate measures in place at 78% overall with 46% selecting it as a major concern.

While these figures are high, it's good news that the most pressing concerns are ones over which you have some ability to influence. Some factors listed, such as having a vulnerable family member at home, are not in your control but these are lesser concerns overall.

You can ease the fears around safety measures and compliance by building trust with your audiences. Make every effort to show how much you value safety as a top priority.

Factors of concern when thinking about returning to cultural activities



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Build trust by reassuring audiences

Although you may communicate your safety measures clearly to everyone, there will still be some doubt as to how much they are being enforced and whether or not other people are following then. Make it about care, not just about regulation. Reassure audiences that rules are in effect by posting photos on social media and your website of people in your venue following the rules and having a great time. This is also a subtle way of reminding people about your safety rules, without explicitly stating them. You can even look to your visitors' social media posts for content that demonstrates how safe and fun it is to visit.

4. Focus on how to inspire them

After months of ‘same’, people are excited for the new

There is a clear desire to try or learn new things

Safety is crucial, but we also need to know how to *inspire* a visit and get people excited about returning to cultural institutions. We asked what would incentivize someone to return to cultural activities once venues are open again post-pandemic. Trying something new was the most selected at 45%.

When we asked what people were looking forward to most upon returning, again, learning new things was a priority for people at 51%.

In Spring/Summer 2020, our studies showed that audiences were most looking for joy from cultural institutions. Joy is still high on the list, but the focus now seems to be on the 'new.' After months of mostly staying at home, people are beginning to crave new experiences more than anything else.

Which, if any, of the following is an incentive to visit cultural institutions once reopened?	
Trying something new	45%
There are fewer tourists in town, this is a chance to visit without the crowds	41%
Supporting cultural institutions in their time of need	38%
It's a safe way to spend a day or evening out	36%
Returning to one of your favorite places	35%
Taking this opportunity to explore your own backyard	35%
The chance to be around others	17%

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When you are able to visit in the future, what will you look forward to most when visiting a cultural institution?	
Learning new things	51%
Seeing beautiful things in an attractive setting	48%
Quality time with friends or family	41%
Fun, joy, and laughter	41%
Stimulating my imagination and creativity	38%
Escape – an antidote to current anxieties	34%
Peaceful reflection and contemplation	33%
Awe, wonder, and food for the soul	31%
Giving us hope for the future	29%
Empathy and personal connection	20%
Being part of a community	20%

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Focus on experiencing new things in your messaging

It is clear there is a strong interest in experiencing new things when people are finally able to begin visiting cultural institutions again. In reopening messaging, focus on what is new and different about the experience you can offer. Whether it’s a new experience someone has never had before, or a new way of experiencing something old, this messaging will help give people a reason to return – tap into their desire for stimulation.

Avoiding crowds is still a priority

The chance to be around others ranks lowest overall, at 17% (and being part of a community is also not a priority, just 20% are looking forward to that). This is not surprising given the safety concerns that surround gathering in large groups.

However there is a positive side to this: visiting cultural institutions without crowds of tourists was also high on the list of incentives to visit (41%). Similarly, seeing beautiful things in an attractive setting (48%) is a strong motivator. And despite the a lack of interest in being around others, spending quality time with friends and family was the third most selected option at 41%. Audiences want to spend time with those closest to them. This can be presented as an exciting opportunity to experience something beautiful with your friends and family.

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The chance to be around others	17%

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Cautious Affirmation want to go back to old favorites

Those in the Affirmation segment are most excited to return to one of their favorite places (40%). This is a segment keen to learn but who also appreciate knowing exactly what to expect.

When you are able to visit in the future, what will you look forward to most when visiting a cultural institution?	
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Empathy and personal connection	20%
Being part of a community	20%

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Emphasize the once-in-a-lifetime chance to have an experience in their own city

This is a new and exciting opportunity for locals to experience something new or an old favorite without the crowds of tourists that normally fill the halls or theaters. People can spend quality, relaxed time with their friends and family! These are great selling points that emphasize safety (lack of crowds), new experiences, and the joy of spending time with the ones you love. There will only be a small opportunity to take advantage of the lack of tourists, so encourage then to act now to help people build memorable experiences that people will want to repeat.

A connection is key in deciding what to see and do

Having a connection is a crucial factor in deciding what to attend

In order to better understand what interests someone to visit a particular venue, we asked which of a series of factors contribute to interest in a particular organization.

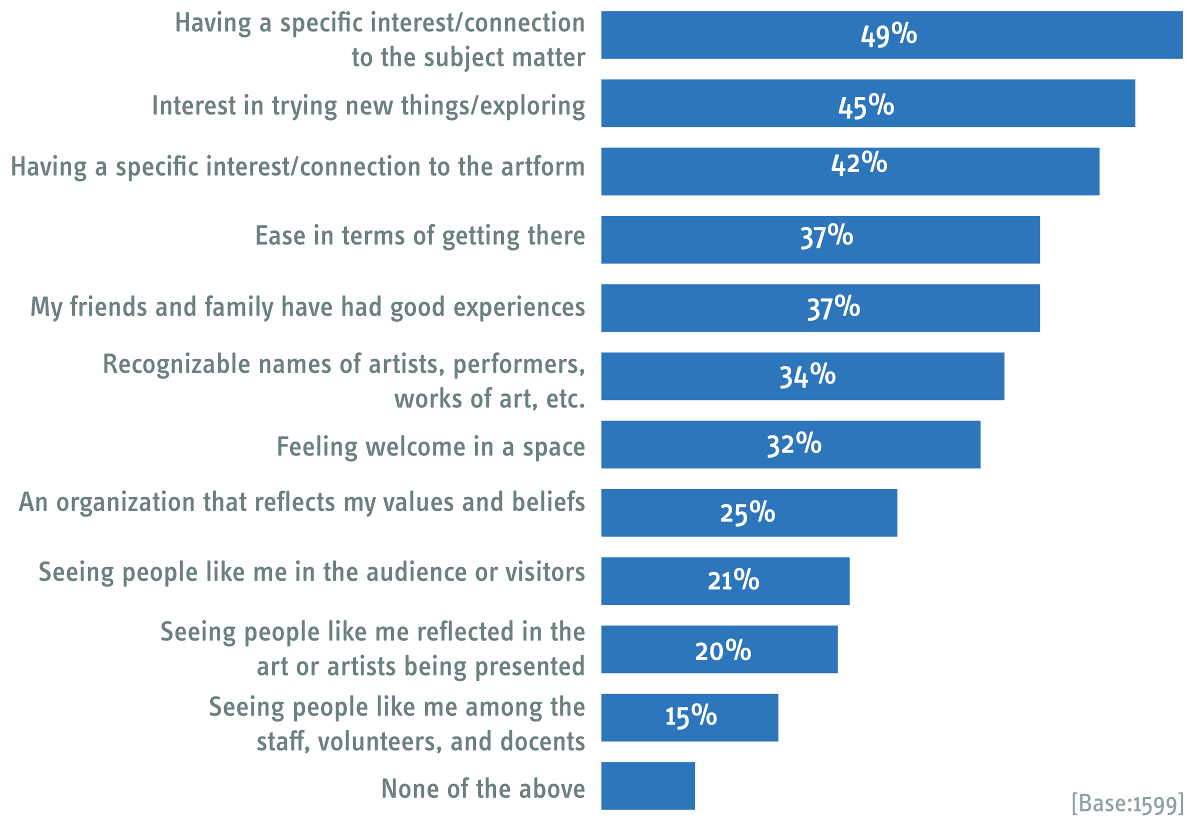
Interest in the subject matter being presented was the highest contributing factor overall at 49%, followed by trying new things/exploring at 45% (linking to the previous page). Those in the Essence and Expression segments are particularly interested in trying new things and exploring.

Connection to the art form also ranks highly as a factor that contributes toward attendance. This seems obvious but is still important – connection is what draws people in.

This is particularly relevant right now. Whilst many people are still wary of crowds, that doesn't mean they're not eagerly searching for connections after extended isolation.

By focusing on what makes your offer relevant, and connecting to human experiences, you can tap into this need for connection that can inspire a visit or attendance.

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



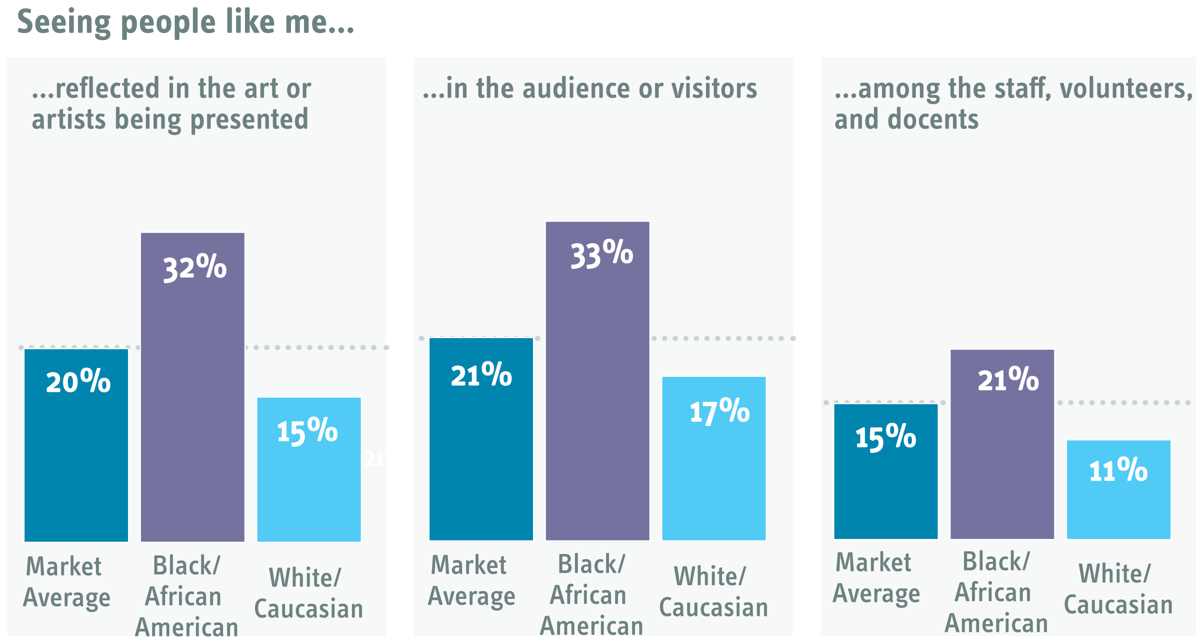
And representation in all areas plays a role in attracting diverse audiences

Black/ African American identifying people were significantly more likely than the market average to cite 'seeing people like me' reflected in the art or artists being presented (32% vs 20%), in the audience or visitors (33% vs 30%), and among the staff, volunteers, and docents (21% vs 15%) as contributing factors towards what they choose to do and see. They are also more likely to attend if the organization is seen to 'reflect my beliefs' than the market overall (30% vs 25%).

These differences become even larger when compared to those who identified as White/ Caucasian.

Black/ African American identifying people again were more likely to choose 'seeing people like me reflected in the art or artists being presented' (24% vs 12%) and 'seeing people like me in the audience or visitors' (18% vs 10%) when asked to select their top three factors. They also choose 'Feeling welcome in a space' as the 3rd highest choice at 34% vs 27% overall, and 23% of White/ Caucasians.

% for whom 'seeing people like me' is a factor in cultural events/activities of interest



[Base:1599, 454, 805]

Representation is key to inclusivity

This evidences the importance of having diverse representation in both the work being presented as well as across staff at all levels of your organization. Although this isn't new and is something we should all be working toward already, the data makes it crystal-clear that representation is essential for achieving diversity in audiences.

5. Use digital content wisely

Online cultural content has helped people cope

Almost two thirds have engaged with some kind of digital content

In the past 12 months, 62% of people have interacted with some sort of digital content from a cultural institution.

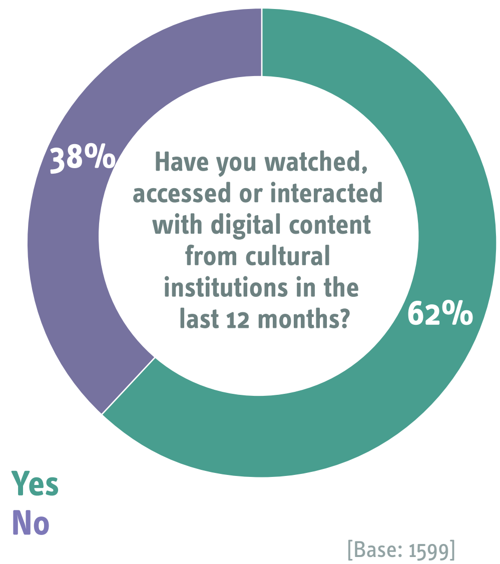
Predictably, those under 45 are more likely to have engaged than older respondents. Additionally, people who identified as Black/ African American (68%) or Hispanic/ Latinx (82%) are more likely to have engaged with digital content as are those with children under 18 living at home (82%).

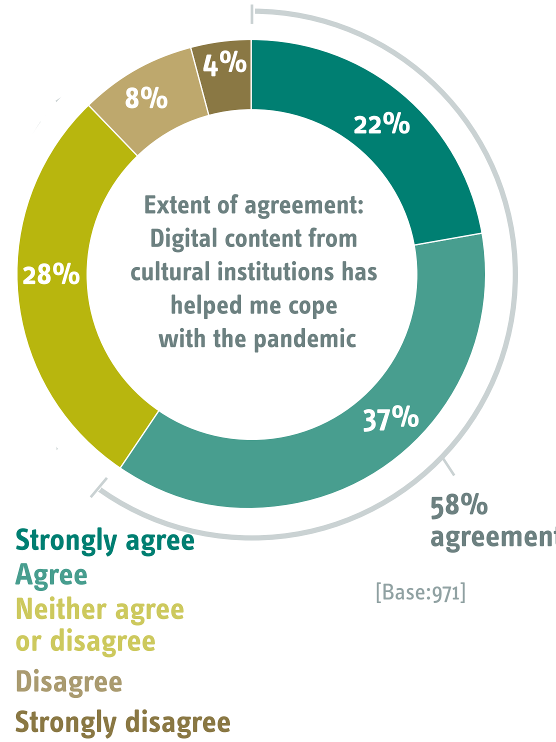
Of those who engaged, over half said it helped them cope

Out of the people who had engaged in digital content, 58% agreed that it help them cope with the pandemic. This is something to celebrate as this type of positive association with cultural institutions will help build goodwill and connection to your organizations.

Expression are the most connected digitally

Of all the segments, Expression is most likely to have engaged with digital content at an impressive 78%. And 76% of Expression who engaged agreed that it helped them cope during the pandemic.





Invite Expression to share

Expression thrive on connection to others. Digital content has been a way of creating this connection while they have been staying at home in recent months. Consider using digital content to encourage future in-person visitation, and also encourage them to share it. Expression can be great advocates as they are well-connected and generous in giving support. They could help you reach new audiences.

Livestreams are popular, museums tours have potential

Livestreams are the most popular way of engaging online to date

Moving forward, there is the most interest in livestreams of live performances at 37%, which is not surprising given this was cited as the most watched content in the last 12 months.

But there could be untapped potential in museum tours and exhibitions

Gallery and museum tours also had a high level of interest at 32%. Unlike live performances, gallery and museum tours were among the least-attended types of content people have already engaged with. This interest in gallery and museum tours is waiting to be fulfilled. Many museums already offer this content, but it hasn't yet received the level of engagement it could. Consider repackaging it, or promoting it in a new way to take advantage of this level of interest.

Families with young children are a prime target for digital content

Those with children under 18 at home are significantly more interested in all types of content we asked about than those without. This is likely parents looking for ways to stimulate and occupy children while staying at home. Educational resources for children was the type of content with the least amount of interest at 18%, however when you look specifically at those with children at home, it jumps significantly to 38%.

Interaction with different types of digital content from cultural institutions	Interest in the future	Engaged in the past 12 months
Live streams of live performances	37%	32%
Talks with artists, writers, or performers	21%	19%
Streams of previously recorded productions or performances	31%	28%
Educational resources for children	18%	19%
Educational resources for adults	26%	22%
Digital exhibitions	25%	16%
Gallery or museum tours	32%	14%

[Base: 1599]

There is willingness to pay for digital content

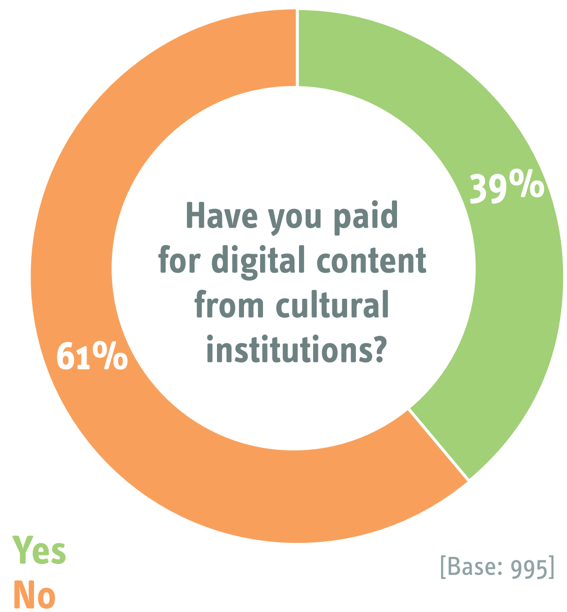
Over a third have paid for digital content

When we asked those who had engaged with digital content from cultural institutions if they had paid for any of it, 39% said they had.

Those with children at home were significantly more likely to have paid at 57%. Nearly 50% of Expression had also paid for digital content.

Recommended maximum of $25 for digital

When asked what the maximum amount they would pay for digital content from cultural institutions, over half said they would pay somewhere in the $5-$25 range. Although 46% said they would pay more than that, by charging more you run the risk of pricing out half your audience. You don't have to under-value your digital offer (almost no one expects to pay under $5) but we do recommend staying within the $15-$25 range and only charging higher/greater amounts for more bespoke special events. The proportion of the audience potentially willing to pay more than $45 will have very high expectations of the experience.



How much would you pay for digital content from a cultural institution?*	
No more than $5	2%
Up to $15	27%
Up to $25	24%
Up to $45	23%
Between $45 and $100	23%

[Base: 539]

*Answers over $100 have been removed the majority of content from cultural institutions has been under $50 with the exception of fundraising events.

Families are also more likely to pay in future

When asked what type of content audiences would pay from of a range of digital content from cultural institutions, livestreams were again the most popular at 31%.

Again, we saw that Expression and those with children at home were more open to paying for digital content in the future. 38% of those with children were interested in paying for educational resources for children, and 37% would pay for gallery or museum tours.

Which, if any, of the following content would you consider paying for from cultural institutions?	Overall market	With children at home
Live streams of live performances	35%	34%
Talks with artists, writers, or performers	22%	25%
Episodic story telling	15%	17%
Streams of previously recorded productions or performances	22%	26%
Educational resources for children	23%	38%
Educational resources for adults	24%	29%
Digital or virtual exhibitions	25%	33%
Gallery or museum virtual tours	25%	27%
I would not pay for online content	21%	12%
Base:	1056	459

Don't miss families in your digital planning

Those with children under 18 living at home have a strong interest in digital content overall, not just educational content for their children. Remember to include families in your digital content planning, and target your campaigns to this specific group. Many parents are looking to entertain their children in new ways after months of being stuck at home. Provide new and exciting opportunities for children of all ages to engage with your work.

Continuing digital content needs a strategic approach

There are mixed feeling about continuing with digital engagement

Once cultural institutions and venues reopen post-pandemic, 36% of the DC market say they would not continue to engage with digital content from cultural institutions. But 49% stated that they will continue to engage.

However, this data needs to be considered in the wider context. When asked if people want a break from their computer screens in their free time, 72% percent agreed, with 33% strongly agreeing. And 59% of the market reported feeling overwhelmed by the amount of content. Reported interest in digital content does not automatically lead to engagement, as there is a huge amount of choice and digital fatigue.

People are looking for other ways to fill their time away from their computer screens, so don't add to the vast content available without a clear goal and a compelling offer that can stand out from the crowd.

Carefully consider your goals with digital

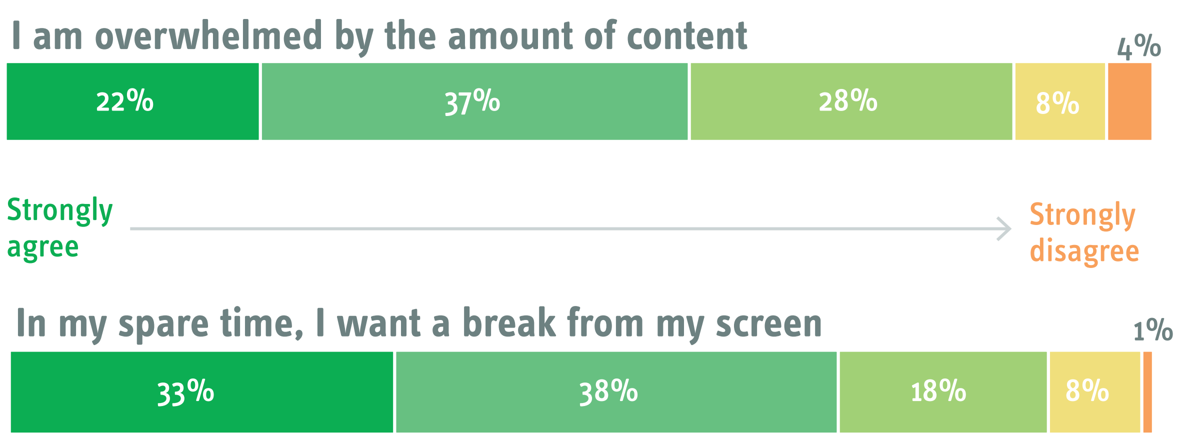
To continue to grow the digital audience you have created during the pandemic, be strategic in the type of content you create, why you're creating it, and who it is for. Is reaching new audiences the goal? Is it about keeping members engaged? Or delivering outcomes you normally would in-person? Consider featuring things that aren't available in person, such as behind the scenes experiences or exclusive/ sold out performance footage.

Brainstorm ideas to engage viewers in activities that merge the digital and the physical, such as art project videos or digital scavenger hunts

49% said 'I will continue to engage with digital content from cultural institutions, even after they reopen'

36% said 'I've enjoyed the digital content available, but I'll stop when I can return to the real thing'

Digital fatigue, DC market overall



[Base: 995, excludes 'don't know/can't say']

6. Consider what 'support' from audiences means

Past donations most likely to be prompted by a visit

Expression are the segment most likely to have donated

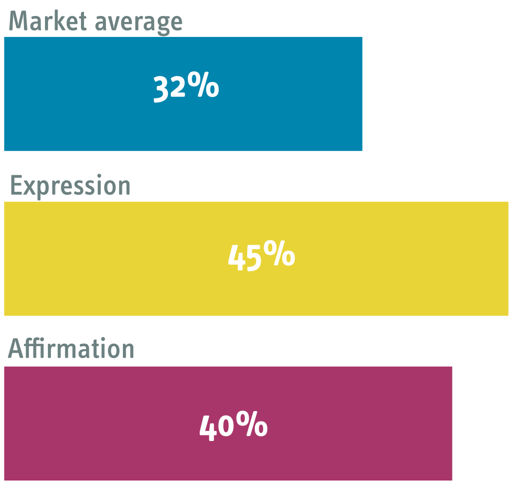
Before we look at future donation behavior, it's important to understand the context of how much of the market has supported cultural organizations in the past and in what ways.

In the Washington, DC area, 32% of people had donated to a cultural institution in the three years *prior* to March 2020. Those in the Expression (45%) and Affirmation (40%) segments are significantly more likely to have donated.

Donations have historically been linked to in-person visits

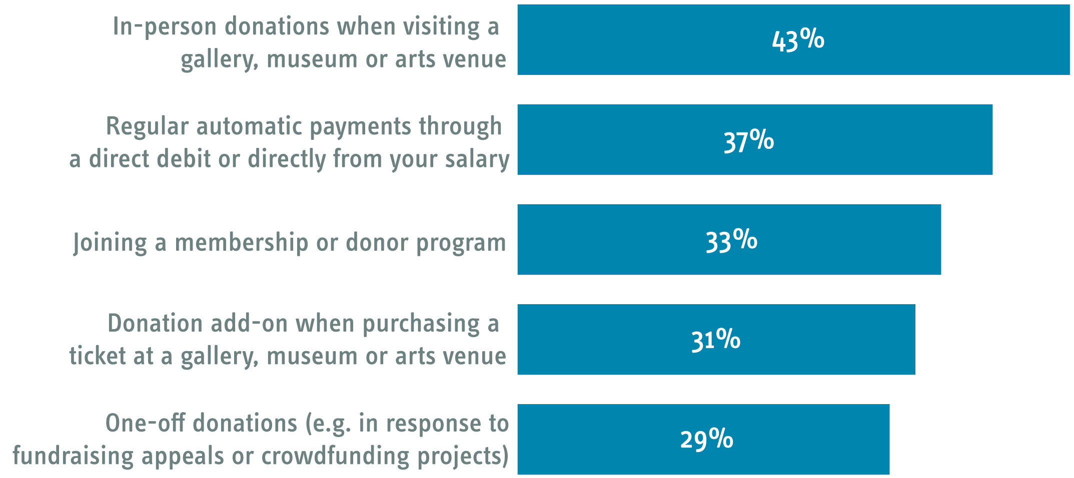
Of those who have donated, most did so in person when visiting a venue (43%). This highlights a challenge faced today: with in-person visits not possible, this removes the key opportunity for donations.

Prior to March 2020, I have donated to a museum, theater, or other cultural institution in the previous three years



[Base: 1599, 582,253]

Prior to March 2020, which of the following describes how you have donated money to a museum, theater, or other cultural institution in the previous three years?



[Base: 505]

Audiences perceive their ‘support’ many ways

Buying a ticket is seen as a way to support right now

37% of people saw purchasing a ticket to visit or see a performance as a way to support your organization. This increased to 48% for those who had donated in the past compared to 31% for those who had not. This also increases to 56% for those who have lost their jobs.

As a sector, we don’t always see a ticket purchase as a show of support, however those who support cultural organizations do. Acknowledging this kind of support and goodwill from your audiences and visitors can help build positive relationships that can easily be turned into donations with the right language.

Non-financial support is also available when needed

29% of would show a non-financial form of support by participating in signing petitions or sharing information online to help build support for additional financial aid for cultural institutions. This support increases for those whose income has been impacted by the pandemic as well as those who are worried about their future income.

Regular, transaction-based schemes aren’t a priority right now

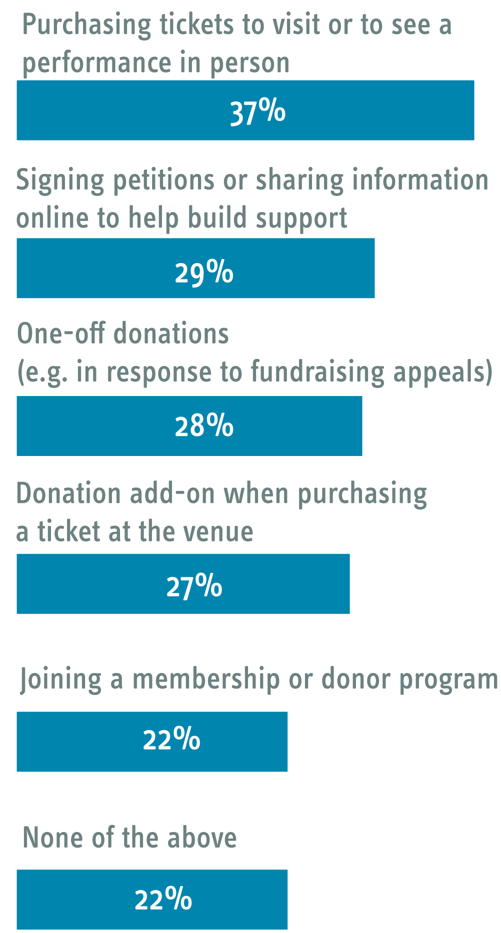
Joining membership or donor programs shows the least amount of interest at 22%. As interest in this type of support is low at the moment and the ability to fulfil potential benefits are limited, consider holding off on membership campaigns until you are able to open your doors.

Get creative in ways people can support you

As several of the most popular methods of support, such as ticket purchases and on-site donations, are unavailable to many at this moment, consider creative messaging to replace this type of support. For example, add a small gift ask to the content pages of your website, similar to the type of ask you may make of someone leaving your space.

Or create a campaign for people to ‘donate’ a ticket back to the organization. Consider Pay it Forward opportunities that may or may not be attached to an experience of some kind.

Which, if any, of the following would you consider doing to help support cultural institutions at this time?



[Base: 1329]

Audiences will support at-risk organizations, if needed

There is clear interest in saving organizations at risk of closure

We asked what would help motivate someone to donate to a specific cultural institution or organization. 43% of the market would donate knowing that their support can help an organization that is at risk of closure, and 40% would donate to help keep artists and staff employed. Both of these reasons highlight a desire to sustain your organizations and the people who work there. This type of emergency funding messaging can bring in high donation numbers, however, it must be used sparingly and only when absolutely necessary to avoid losing trust with your donors and audience. This is also not a sustainable fundraising strategy and is unlikely to build longer-term support.

Values and community are also reasons to support

Both 'supporting an organization in my community' and 'an organization with a strong mission that aligns with my beliefs' were selected frequently. Demonstrate that you stand for something and what your organization means to the wider community. By putting your mission at the forefront of your fundraising campaigns, you can attract more donations as well as build lasting support from your community.

What would motivate you to support to a specific museum, theater, or other cultural institution?	
Knowing that my support can help an organization that is at risk of closure	43%
Helping keep artists and staff employed	40%
Supporting an organization in my community	38%
Supporting an organization with a strong mission that aligns with my beliefs	37%
Supporting an organization I visit frequently	36%
Seeing what my support can do to help an organization	32%
The benefits supporting an organization can bring such as tickets and access	27%
Being able to share the work of an organization with others	22%

[Base: 1006]

Demonstrate clear values and build community as sustainable fundraising options

This is a great time to reflect on your values and your mission. What do you contribute to the world as well as the community around you? Building support based on substantial cause and values creates longer term, deeper relationships with your community. Deeper relationships mean more sustainable fundraising opportunities as people are investing in what your organization truly stands for and not just giving to help you during a difficult time.

If your organization is struggling there is widespread will to support, but jeopardy funding should be used sparingly. Framing specific asks as sustaining individual programs or initiatives could be a less extreme alternative.

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