



**AUDIENCE
OUTLOOK
MONITOR**

Snapshot Report:
Digital & Live Streaming

All AOM Cohorts

October 2020

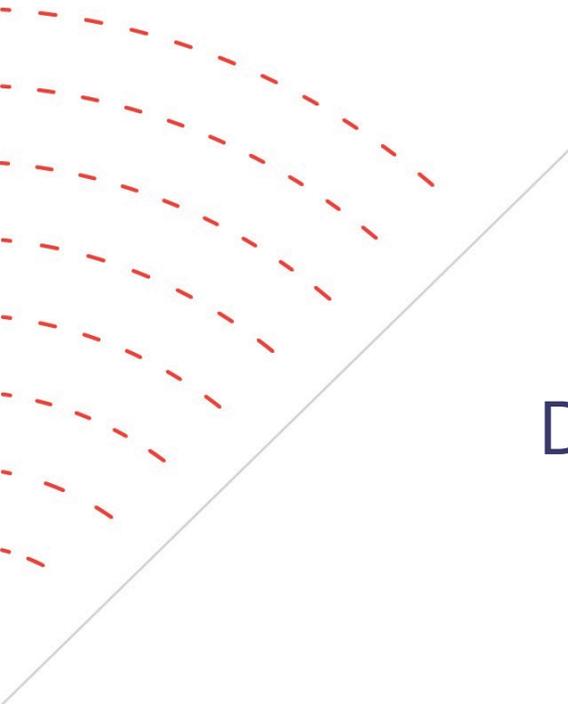


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About this study

This snapshot report updates key findings using the September and October deployments of the Audience Outlook Monitor (AOM) in the United States, a study that is tracking how audiences feel about attending arts and culture events in the context of the COVID-19 pandemic. The following pages offer an in-depth review of respondent feedback on the role of live streaming content throughout the sector. This report reflects data collected by all participants in the AOM study, as indicated in the following pages.

Participating Organizations

Organization Name	City
Apollo Theater	New York, NY
Arena Stage	Washington, DC
Aronoff Center for the Arts	Cincinnati, OH
AT&T Performing Arts Center	Dallas, TX
BAM	Brooklyn, NY
Bass Performance Hall	Fort Worth, TX
Blumenthal Arts	Charlotte, NC
Cal Performances	Berkeley, CA
CAPA and Broadway in Columbus	Columbus, OH
Carnegie Hall	New York, NY
Carolina Performing Arts	Chapel Hill, NC
Center for the Arts at George Mason University	Fairfax, VA
Dayton Live	Dayton, OH
Denver Center for the Performing Arts	Denver, CO
Dr. Phillips Center for the Performing Arts	Orlando, FL
Hancher Auditorium	Iowa City, IA
Hult Center for the Performing Arts	Eugene, OR
Hylton Performing Arts Center	Manassas, VA
Jazz at Lincoln Center	New York, NY
Kentucky Performing Arts	Louisville, KY
Kimmel Center for the Performing Arts	Philadelphia, PA
Leshner Center for the Arts	Walnut Creek, CA
Lincoln Center for the Performing Arts	New York, NY
Marcus Performing Arts Center	Milwaukee, WI
Meany Center for the Performing Arts	Seattle, WA
Midland Center for the Arts	Midland, MI
New Jersey Performing Arts Center	Newark, NJ
New York City Ballet	New York, NY
New York City Center	New York, NY

New York Philharmonic	New York, NY
Northrop, University of Minnesota	Minneapolis, MN
Ordway Center for the Performing Arts	St. Paul, MN
Orpheum Theater/Holland Center	Omaha, NE
Pittsburgh Cultural Trust	Pittsburgh, PA
Playhouse Square	Cleveland, OH
Round House Theatre	Washington, DC
Roundabout Theatre Company	New York, NY
Seattle Theatre Group	Seattle, WA
Seegerstrom Center for the Arts	Costa Mesa, CA
Signature Theatre	New York City, NY
Strathmore	North Bethesda, MD
Studio Theatre	Washington, DC
Tennessee Performing Arts Center	Nashville, TN
The Adrienne Arsht Center for the Performing Arts	Miami, FL
The Broward Center for the Performing Arts	Fort Lauderdale, FL
The Bushnell Center for the Performing Arts	Hartford, CT
The Clarice Smith Performing Arts Center	College Park, MD
The Grand Theater	Wasau, WI
The Kennedy Center	Washington, DC
The Kravis Center	West Palm Beach, FL
The Metropolitan Opera	New York, NY
The Shed	New York, NY
The Smith Center	Las Vegas, NV
The Soraya, Cal State Northridge	Northridge, CA
The Tobin Center for the Performing Arts	San Antonio, TX
University of Florida Performing Arts	Gainesville, FL
Walton Arts Center	Fayetteville, AR
Wolf Trap	Vienna, VA

Impact of live streaming content

The following section of this snapshot report pertaining to live streaming content is based on data collected from the most recent waves of surveys deployed in August, September and October 2020.

Consistently, four in five respondents claim to have watched a live-streamed performance of music, dance or theatre at home.

Live Stream Engagement

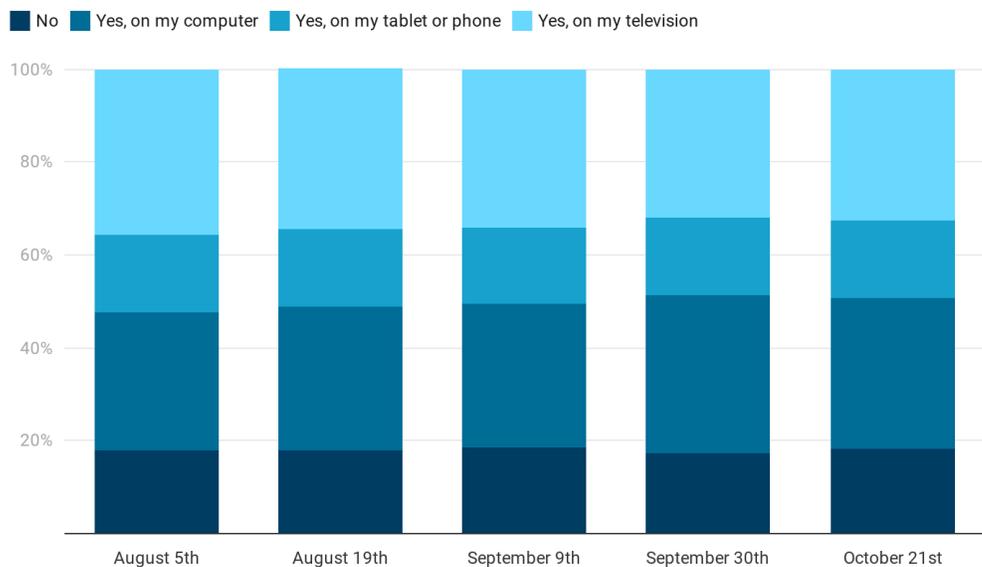


Chart: AMS Analytics • Source: Audience Outlook Monitor, August-October 2020 • Created with Datawrapper

Fig 1: "Have you ever watched a live-streamed performance of music, dance, or theatre at home?"

Respondents most frequently utilize a computer or television to livestream content, though one in four consistently use a tablet or phone.

Eagerness to attend live performances and strong affinity toward specific institutions drive engagement with live streaming content. Those who are very eager to return to live performance were also more likely to have engaged live-streaming content. Similarly, nearly four in five possessing a strong bond with their organization have watched a live stream, while

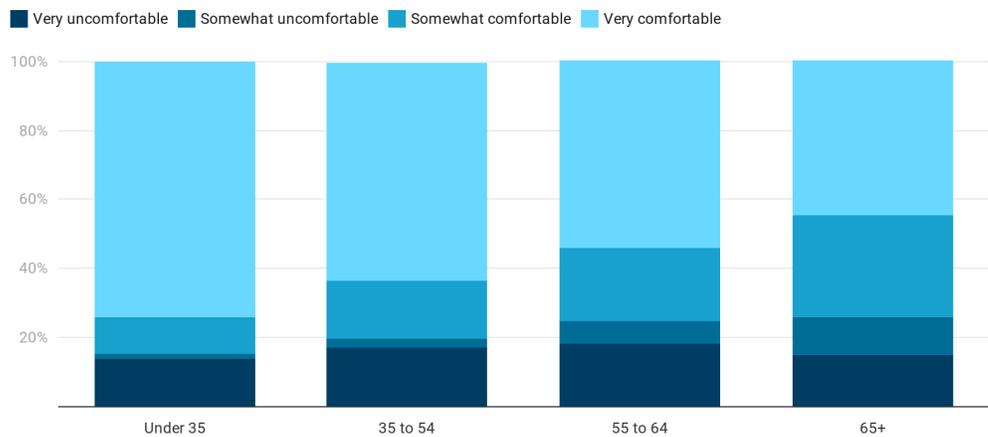
only two thirds of respondents claiming a weak bond with their institution have live streamed.

All ages are engaging equally with streaming content, but eight in ten respondents from the northeast region utilize live streams, versus seven in ten in other regions nationwide.

78% of respondents are at least *'somewhat comfortable'* navigating on a computer or mobile device to stream a live performance.

Though most express general levels of comfort navigating streaming platforms on their electronic devices, an inverse correlation exists between age and comfort. At the extremes of the demographics, less than half of respondents over 65 report being *'very comfortable'* with the task, while nearly three quarters under 35 are *'very comfortable'* with navigating their devices.

Comfort with Technology by Age



n=6275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 2: How comfortable are you navigating on your computer or mobile device to stream a live performance? (October 21 deployment)

55% of respondents would be at least *'somewhat likely'* to purchase tickets, knowing that they may have to watch some

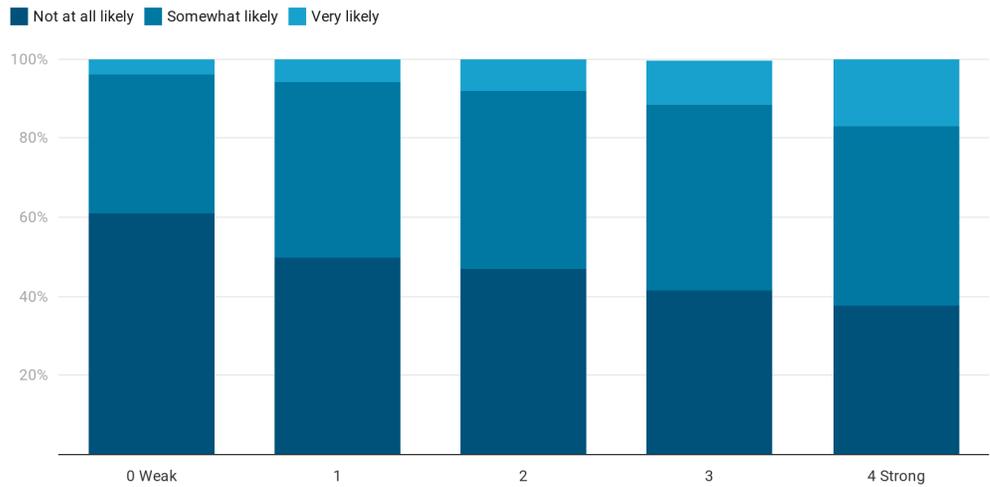
or all of the performances at home via live stream based on social distancing requirements.

While aggregate data suggest the presence of support for live streaming as an alternative, specific subgroups of respondents are inclined to purchase tickets if live streaming becomes the only offering. Of those respondents who say they will return as soon as gatherings are permitted, less than three in ten would purchase tickets knowing they might have to watch some or all performances at home.

Health factors also impact willingness to engage in live streaming as an alternative to in-person attendance. Those with health vulnerabilities are more inclined to pay for tickets given the possibility of having to watch some or all of the performance remotely via live stream (60%), as compared with those who do not have a health risk (51%).

Intimate connection or bond with the organization also has a bearing on willingness to consider live streaming as an alternative to in-person attendance. In October, 62% of donors to their organization reported that they are at least *'somewhat likely'* to purchase tickets given these conditions, whereas only 54% of non-donors will do so. October deployments also reveal that more than six in ten respondents who claim to have a strong bond with their organization will be at least *'somewhat likely'* to purchase tickets even if they are required to watch via live stream, while only four in ten of those with a weak bond would do so.

Interest in live streaming; by bond with organization



n=6,275
 Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 3: Likelihood to purchase tickets with livestream option, sorted by affinity with organization (October 21 deployment)

Two in three respondents would consider the live stream option more attractive if provided the option of watching any time during the week following the live performance.

Attractiveness of livestream given weeklong access

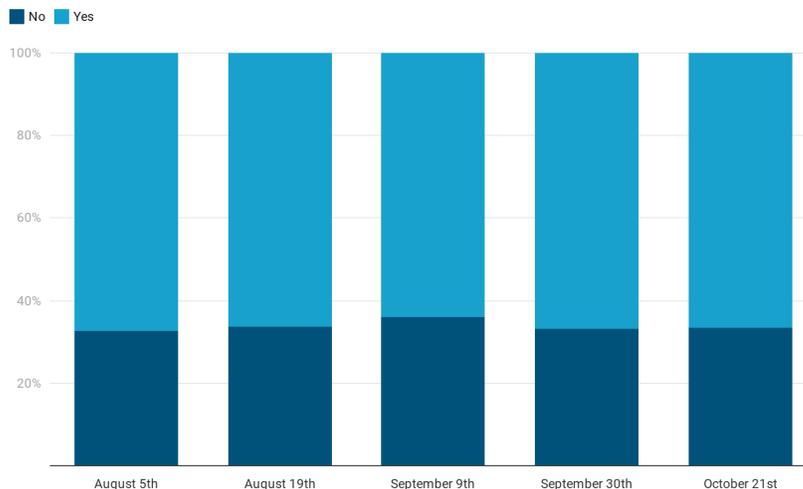


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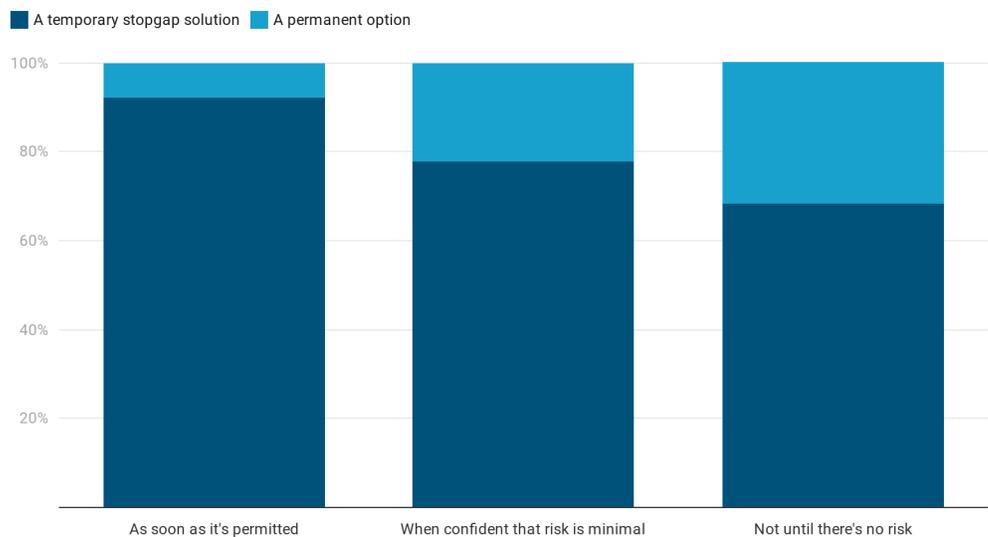
Fig 4: “Would the live stream option be more attractive if you had the option of watching any time during the week following the live performance?”

Nearly eight in ten respondents believe that live streaming is a temporary stopgap measure rather than a permanent option for the delivery of arts content.

The view of live streaming as a temporary platform provides some level of confidence that live performance is in great demand and the value of in-person events cannot be replaced.

Of those who will return as soon as gathering is permitted, more than nine in ten see live streaming as only temporary. Respondents with prohibitive health conditions also view live streaming as a temporary stopgap measure; two thirds of those who will not return until there is no risk say that live streaming is only a temporary solution.

Livestreaming as a permanent option; by risk tolerance



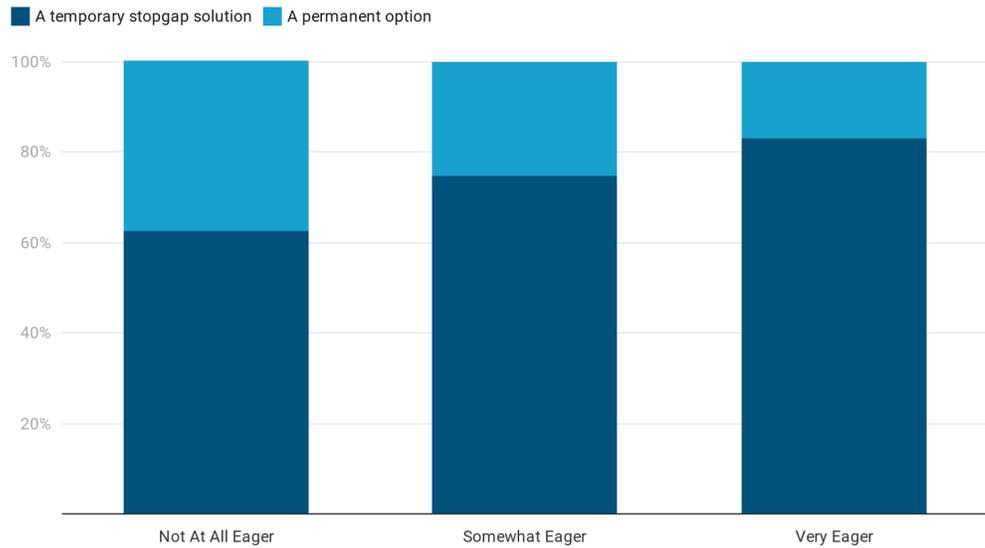
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Chart: AMS Analytics - Source: Audience Outlook Monitor, October 2020 - Created with Datawrapper

Fig 5: "Do you think of the live stream option as a temporary stopgap measure or a permanent option?" (by risk tolerance - October 21 deployment)

In October, more than eight in ten of those who are very eager to return to live performance reported that they consider live streaming to be a temporary measure; of those who are not eager to return only six in ten consider live streaming a temporary solution.

Livestreaming as a permanent option; by eagerness to return



n=6,275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 6: “Do you think of the live stream option as a temporary stopgap measure or a permanent option?” (by eagerness to return – October 21 deployment)

Subscribers are also more apt to view live streaming as temporary, compared to those who are former subscribers or those who have never subscribed at their organization.

While the barriers to engage with streaming content continue to diminish and audiences are increasingly engaging with the content, the motivations for doing so vary. In many cases, patrons (particularly those who are more loyal) report engaging in live streaming simply to stay connected with and support their institutions. Many still believe that streaming options cannot compare to the value and uniqueness of live performances and wish to return to attending in-person events, though under a variety of health safety conditions.