



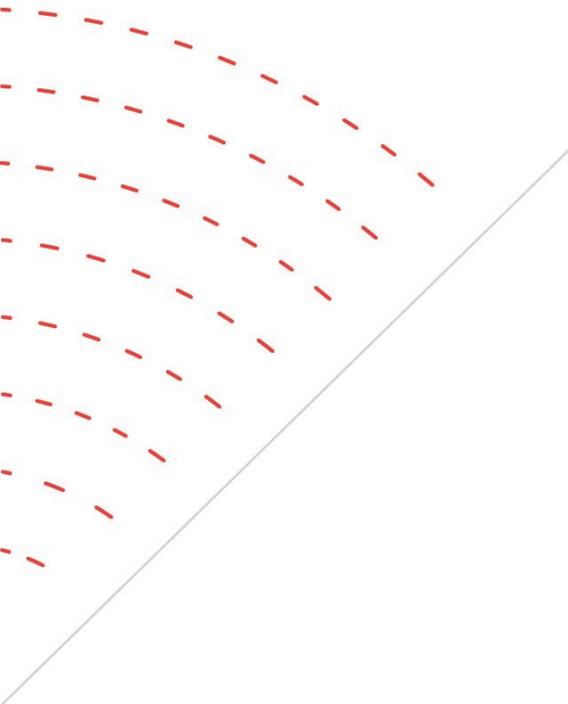
**AUDIENCE
OUTLOOK
MONITOR**

Snapshot Report

PAC National Cohort

First Wave Findings

June 2020



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About this study

This snapshot report outlines key findings from Wave 1 of the Audience Outlook Monitor 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.

Participating Organizations

Organization Name	City
Adrienne Arsht Center	Miami, FL
Aronoff Center	Cincinnati, OH
AT&T Performing Arts Center	Dallas, TX
Bass Performance Hall	Fort Worth, TX
Blumenthal Arts	Charlotte, NC
Broward Center for the Performing Arts	Fort Lauderdale, FL
Bushnell Center for the Performing Arts	Hartford, CT
Columbus Association for the Performing Arts	Columbus, OH
Dayton Live	Dayton, OH
Denver Center for the Performing Arts	Denver, CO
Dr. Phillips Center for the Performing Arts	Orlando, FL
Grand Theater	Wasau, WI
Hult Center for the Performing Arts	Eugene, OR
Kennedy Center	Washington, DC
Kentucky Performing Arts	Louisville, KY
Kimmel Center for the Performing Arts	Philadelphia, PA
Kravis Center	West Palm Beach, FL
Lesher Center for the Arts	Walnut Creek, CA
Lincoln Center for the Performing Arts	New York, NY
Marcus Performing Arts Center	Milwaukee, WI
The Music Center	Los Angeles, CA
New Jersey Performing Arts Center	Newark, NJ
Ordway Center for the Performing Arts	Saint Paul, MN
Orpheum Theater/Holland Center	Omaha, NE
Pittsburgh Cultural Trust	Pittsburgh, PA
Playhouse Square	Cleveland, OH
Seattle Theatre Group	Seattle, WA
Seegerstrom Center for the Arts	Costa Mesa, CA
Smith Center	Las Vegas, NV
Tennessee Performing Arts Center	Nashville, TN
Tobin Center for the Performing Arts	San Antonio, TX
Walton Arts Center	Fayetteville, AR

Overview of results

84%

Are at least *'somewhat eager'*
to return to their Centers

87%

Plan to attend as much or more
than they did
before the pandemic

38%

Would be *'encouraged'* to attend
by the presence of
venue safety measures

20%

Will resume attendance
as soon as restrictions are lifted

75%

Anticipate spending for
subscriptions or tickets will be the
same as before the health crisis
began

58%

Will attend if required to wear a
mask and adhere to social
distancing

Survey Responses

32

Participating
Performing Arts Centers

8,683

Total responses

Audience sentiment toward attending cultural activities

89% of respondents do plan to resume attending arts and cultural events, but only under a variety of conditions related to the status of COVID-19.

Most respondents ultimately plan to return to arts and culture events, but their attendance is predicated on specific conditions being met, whether that means that *the rate of new infections has dropped to near zero, testing and treatment are broadly available, or respondents have been vaccinated personally*. Meanwhile, one in five plan to return as soon as legally allowed.

94% of respondents did not have firm plans to visit cultural venues (museums, galleries, theaters, fairs/festivals, lectures or public parks) in the two weeks prior completing the survey.

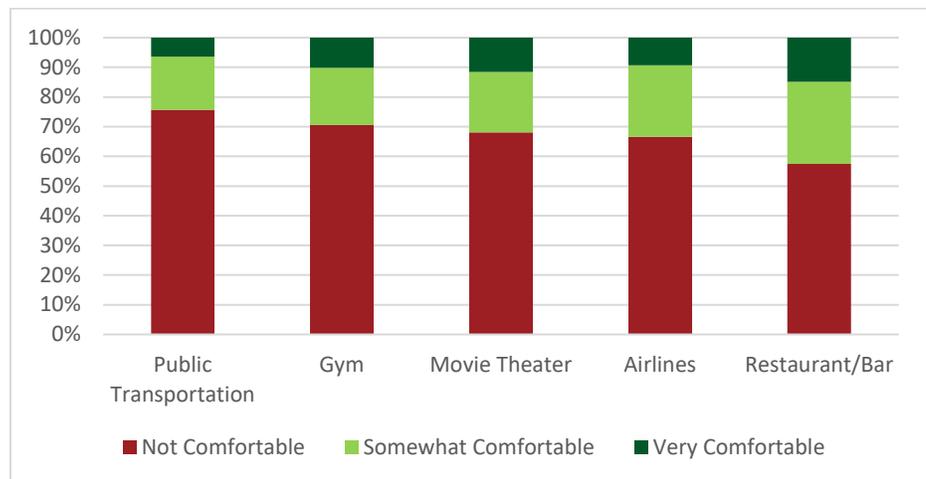


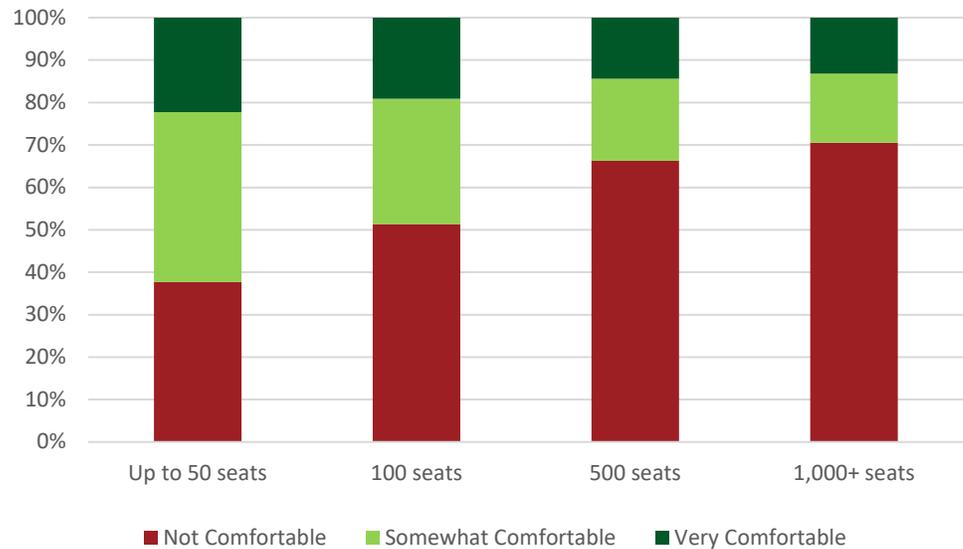
Fig 1: How comfortable would you feel doing these public activities today, given no restrictions?

Overall, audiences are looking forward to returning to more normalized levels of cultural and social activity but are not yet comfortable being in settings which call for large gatherings. Four in five respondents say they are not yet prepared to attend cultural venues today.

What venues make audiences feel most comfortable

Respondent comfort with theatres inversely correlates to venue capacity.

As venue capacity increases, the level of comfort with venues drops.



More than half of respondents would be at least *somewhat comfortable* currently at outdoor concerts, in community art spaces, or in museums and galleries, if they were open and following social distancing guidelines.

Spaces where social distance can more easily be maintained correlate with increased comfort levels. Over half of respondents express that they would be comfortable at an outdoor event or in a smaller community art space, and nearly three in four would be comfortable in a museum or gallery.

How audiences are supporting Centers during COVID-19

75% of respondents anticipate their overall spending for subscriptions or tickets will be the same as before the health crisis began.

Three out of four respondents claim to be at least *moderately committed* to ensuring that the organization they patronize emerges from the health crisis as strong as before. Most respondents anticipate that their level of patronage will be the same as pre-COVID, once they feel safe to emerge.

62% are at least somewhat likely to be willing to pay higher ticket prices temporarily.

84% of respondents are at least *somewhat eager* to return to their Centers; **43%** are *very eager* to return.

On average, 65% of respondents said they would return to their cultural institutions in January 2021, if given the option.

How Centers are communicating with their patrons, and what Centers can do to support audience needs

78% of respondents believe their center has done a *good or excellent job* of staying in touch with patrons.

86% of respondents indicate that the frequency of communication from their Center has been about right.

83% of respondents *agree or strongly agree* that they will be most interested in the same kinds of performances as they were before COVID-19.

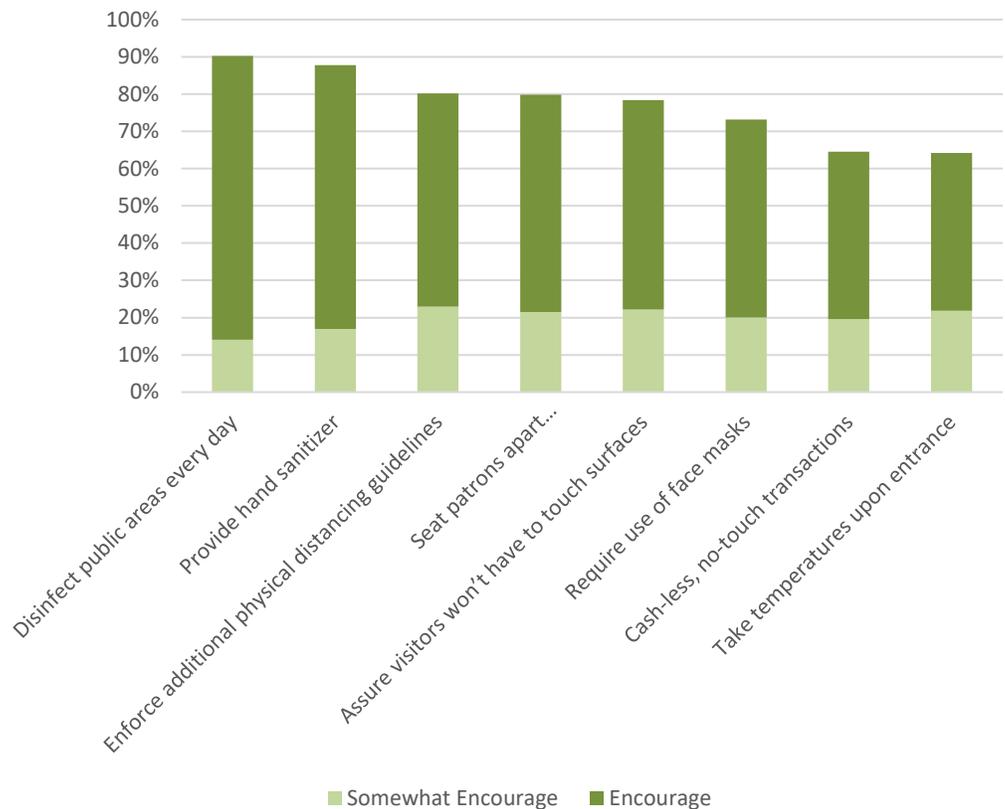
Content preferences are unlikely to change due to the circumstances surrounding the pandemic. Fewer than one in ten are interested in seeing works that help to make sense of the pandemic.

Only 13% of respondents have consumed digital broadcasts or content offered or recommended by their Center since the health crisis began.

Only one in twenty have engaged digital content more than once, and one in five are not aware of digital content being offered by their Center. By way of exception, a greater percentage of New Yorkers are engaging in digital content than residents of any other state.

The impact of health practices being employed to protect patrons

Nine in ten respondents would be at least somewhat encouraged to attend by the disinfecting of public areas daily and provision of hand sanitizer.



58% of respondents will attend if required to wear a mask and adhere to social distancing, while 31% *may attend*.

Those who *may not* or *would not* attend if required to wear a mask indicate that the mask would be uncomfortable and intrusive to their experience; they would prefer to wait until it is safe enough for masks to not be required.

A deeper dive – how results differ by region

Residents of select midwestern, southern, and western states are generally more comfortable with attending both social and cultural events as soon as they are legally allowed and have been making firm plans to attend events when possible over the last month. Residents of Arkansas, Colorado, Indiana, Nevada, South Carolina, Tennessee and Texas tend to express higher levels of comfort with social activities, and have engaged in these activities at a higher rate in the past month (particularly dining out). Residents of South Carolina and Nevada would be notably more comfortable attending venues currently, regardless of capacity. Audiences in Nevada and Colorado may return earlier than others, with a notably higher percentage indicating interest in returning in September 2020.

In contrast, residents of eastern seaboard states including New Hampshire, Maryland and Florida do not foresee going out until the risk is reduced to zero. Those in New York and Washington DC more often responded that they are 'very eager' to return to cultural organizations, and are also most likely to be interested in pandemic-related content at their centers looking forward.

Giving to organizations also varies by region: while four in five nationwide anticipate donating similar amounts as they have in the past 12 months, New Yorkers are much more likely than residents of any other state to donate the value of their unused tickets.