

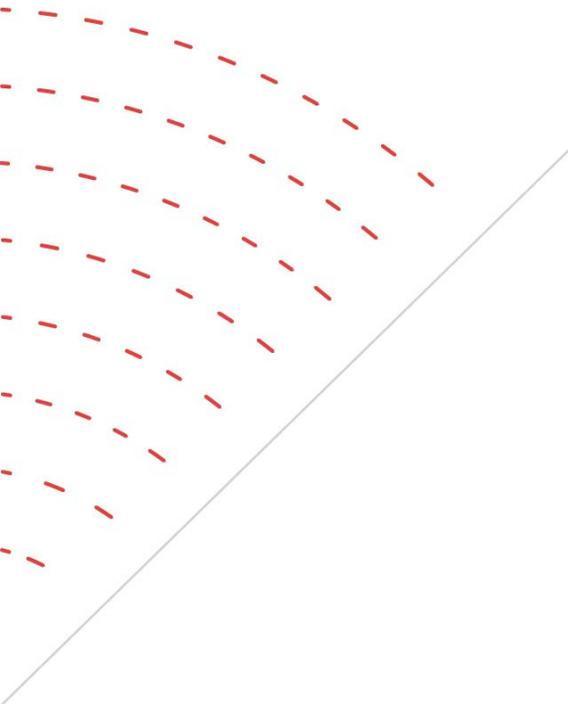


**AUDIENCE
OUTLOOK
MONITOR**

Snapshot Report

All Cohorts

April 2021



Immediate demand for public-facing activities has increased

- Comfort levels related to returning to all types of cultural venues, including a large theaters or concert halls, have continued to increase since January
- The percentage of patrons who have been fully vaccinated and are ready to return immediately has grown from 11% in late February to 21% in mid-March
- 58% of those without household health vulnerabilities remain likely to return immediately, versus only 37% of audience members in vulnerable populations
- As of mid-March, 57% expect to resume attending live performances before September 2021; this is up from 51% in late February

BIPOC audience members reveal uneven impacts of the pandemic and levels of pent-up demand

- Black or African American respondents are 21% more likely than White respondents to have lost income due to the pandemic; Hispanic and Latino/Latinx respondents were 51% more likely to have lost income than White respondents
- As of mid-March, Black respondents are more pessimistic than other racial and ethnic groups about when they will resume attendance; 24% report that they expect to return in January 2022 or later, versus only 12% of White respondents who say the same
- Only 29% of Black respondents in mid-March were very confident in the vaccination effort's success in enabling resumption of normal activity within a year, versus 50% of White respondents

Two-thirds of arts & culture patrons have been vaccinated

- As of mid-March, 67% of patrons report having been fully or partially vaccinated, up from 43% in late February; in total 94% already have or are expecting to get the vaccine
- Older populations are vaccinated at a higher rate: 93% over age 65 report having been vaccinated as of mid-March
- Nine in ten state they will comply with health safety measures in attending venues, regardless of vaccination status

Audiences prefer live over digital performances

- As of mid-March, only 10% of respondents expect the role of online cultural programs to be substantial in their cultural life once venues reopen
- 45% in late February and 46% in mid-March say they have watched online programs (whether paid or free) in the two weeks prior to being surveyed