AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

January 2021

Table of Contents

About this study

This snapshot report updates key findings using the December 2020 and January 2021 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 study includes analysis of shifting demand for live events, comfort in venues, anticipated future support for centers, centers' communication with patrons, and the impact of health and safety measures. Additional modules included in this deployment study respondents' attitudes toward vaccination and behaviors around digital arts and culture offerings. 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
Lesher 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
Segerstrom 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
UIS Performing Arts Center	Springfield, IL
University of Florida Performing Arts	Gainesville, FL
Walton Arts Center	Fayetteville, AR
Wolf Trap	Vienna, VA

Overview of results

97%

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

93%

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

20%

Will resume attendance as soon as restrictions are lifted

92%

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

68%

of January respondents say they will be vaccinated right away

66%

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

Survey Responses

59

Participating Performing Arts Centers and Producers

6,954

Total responses (January 13)

Executive Summary

December 2020 and January 2021 results demonstrate that demand for future live programming has remained strong despite coronavirus shutdowns and declining attendance at cultural events currently. Patrons continue to be supportive of their organizations' return to operation through financial giving and participation in online programming. About 70% of respondents plan to be vaccinated immediately upon availability of the vaccine.

Pent-up demand remains strong

93% of respondents indicated they would attend at least as much as before the pandemic began.

Despite the strengthening impact of the virus through the holiday season, pent-up demand continues to hold steady, and has even grown slightly. 93% of respondents in mid-January indicated that their attendance will be at least as frequent as before the pandemic (versus 92% in October). Along with anticipated *attendance,* anticipated *overall spending* has increased. 23% of respondents in mid-January indicated that their spending will increase above pre-pandemic levels, versus only 15% in December.

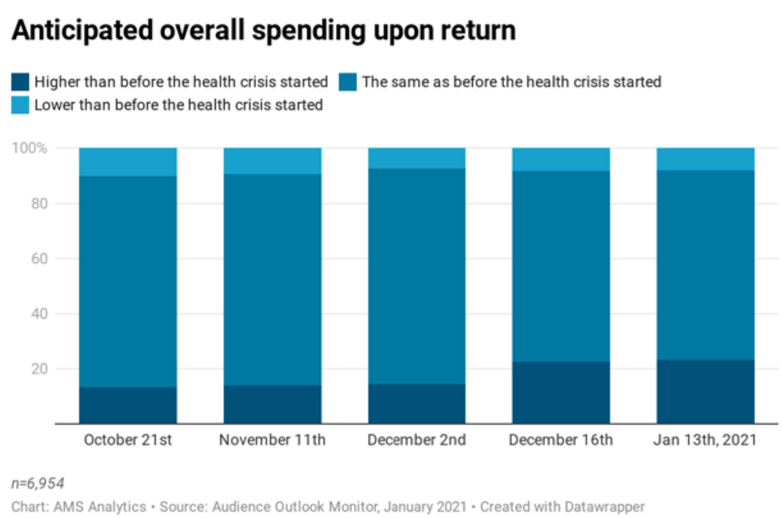

Fig 1: "When you feel comfortable going out again, do you anticipate your overall spending on subscriptions or tickets will be..."

In support of the return to live programming, 80% of respondents continue to view livestreaming as purely a temporary stopgap measure.

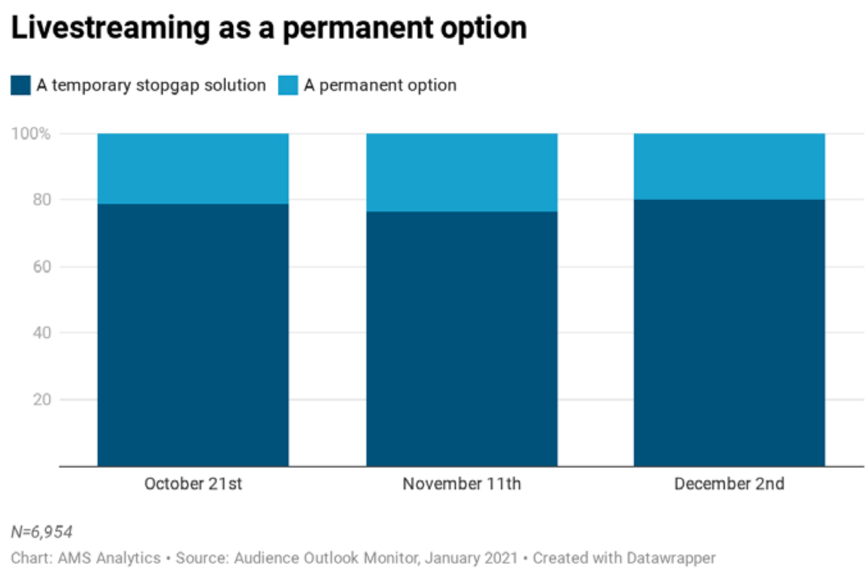

Fig 2: "Do you think of the live stream option as a temporary stopgap measure, or as something that you might want to take advantage of on an ongoing basis even after venues are allowed to fully reopen?"

Current virus impacts are resulting in declining participation

80% of respondents are waiting for epidemiological conditions to change before attending arts and cultural events in person.

Respondents' comfort with attending programs right now has declined throughout the fall into early winter, presumably due to lockdowns and spikes in coronavirus cases around the United States. Despite declining confidence in attending live events, outdoor festivals and museums continually retain the highest overall levels of comfort due to flexibility and the capability of social distancing.

Participation in public events also declined through December. Only one in ten respondents made firm plans to attend cultural events including fairs, lectures, live performances, movie theaters or galleries, in the two weeks prior to taking the survey; this is down from two in ten in November. While 47% of respondents expressed at least some comfort in bars and restaurants in November, this figure dropped to 37% in mid-December and leveled off at 43% as of mid-January.

The importance of vaccinations is on the rise. Data suggests a significant increase of interest in personal vaccination since October, when less than a third of respondents said that vaccination or personal immunity was necessary for them to resume attendance. As of mid-December 2020, however, nearly half of respondents indicated that they will resume attendance only once they are vaccinated or have developed immunity. This level of interest has remained steady through mid-January.

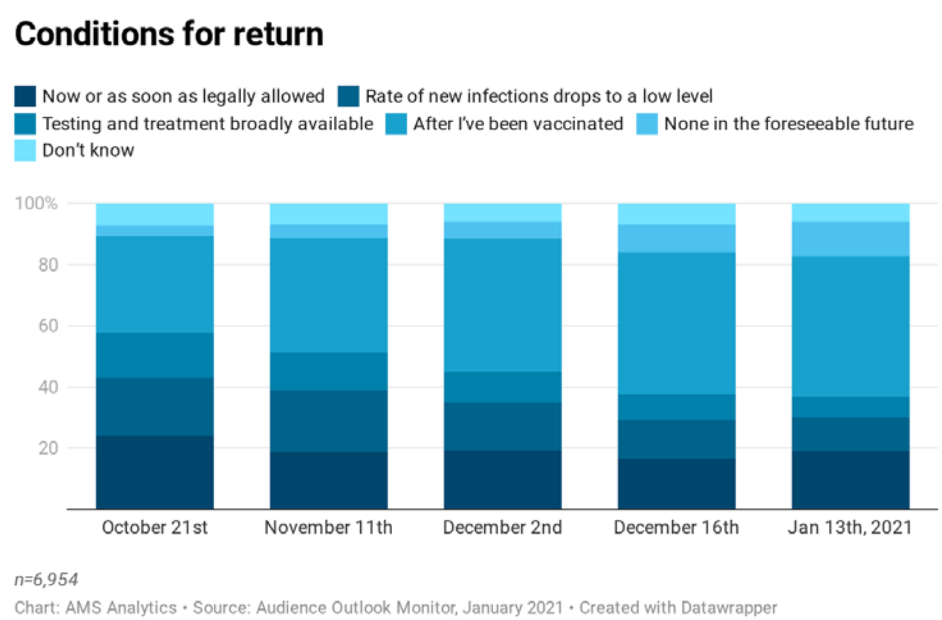

Fig 3: "Under what conditions will you resume attending arts and cultural events?"

Audience confidence in vaccination is strong and growing overall

Nearly seven in ten respondents indicate that they plan to be vaccinated immediately upon availability of the vaccine, up from about half of respondents in December

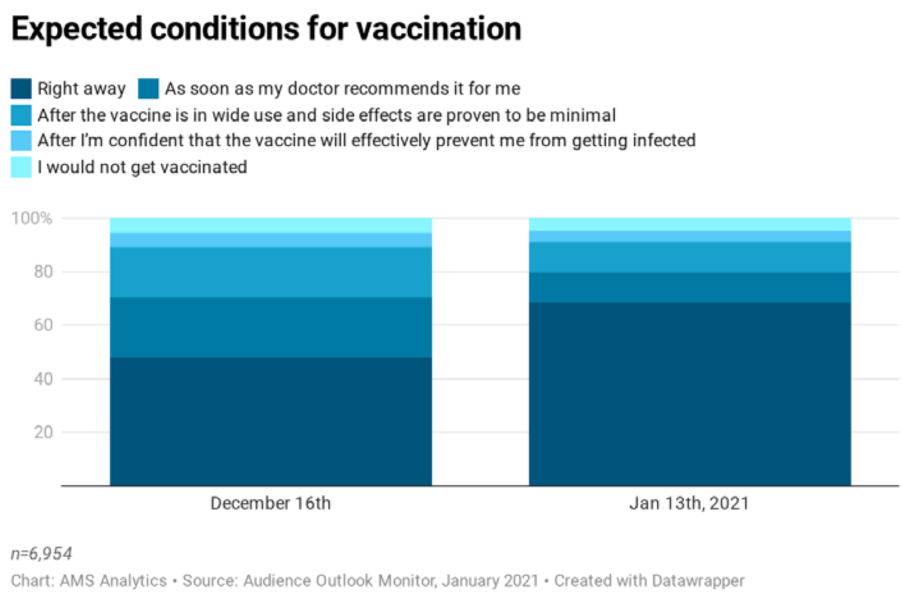

Fig 4: "When a federally approved COVID-19 vaccine is available to the general public, do you expect to get vaccinated…"

68% of January respondents say they will be vaccinated right away. Of those who will not be vaccinated immediately, 44% are concerned about side effects, and another 60% are altruistically waiting to ensure that higher risk individuals receive the vaccine first.

Of those who are waiting for personal vaccination or immunity prior to going out, 42% will resume attendance after observing the impact of '*public adoption of the vaccine on infection rates*'. Another 43% say that they trust the waiting period recommended by officials to ensure the vaccine is effective.

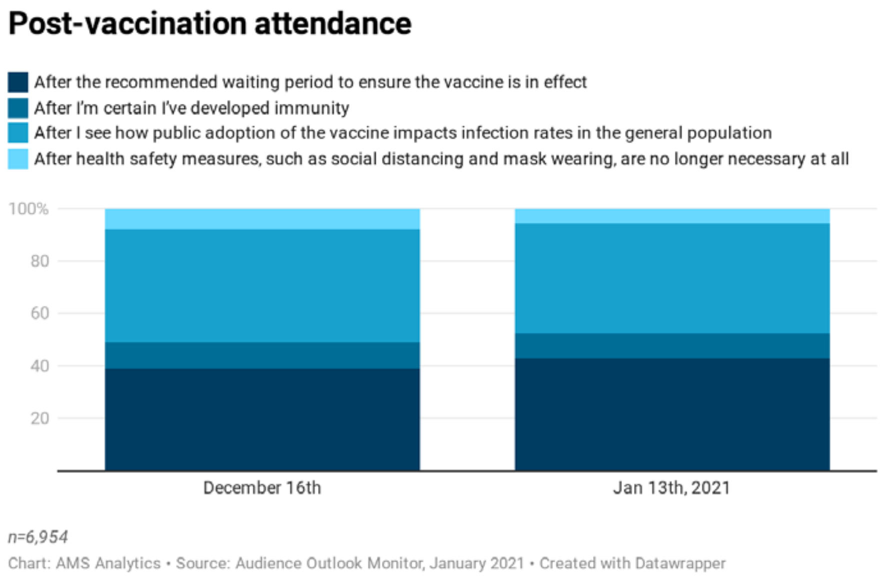

Fig 5: "After you've been vaccinated, would you expect to resume going to arts and cultural events...?"

Respondents with low risk tolerance are more likely to be vaccinated right away; meanwhile, less than half of respondents who plan to return as soon as they are permitted will be vaccinated right away, and 18% say that they will not be vaccinated at all.

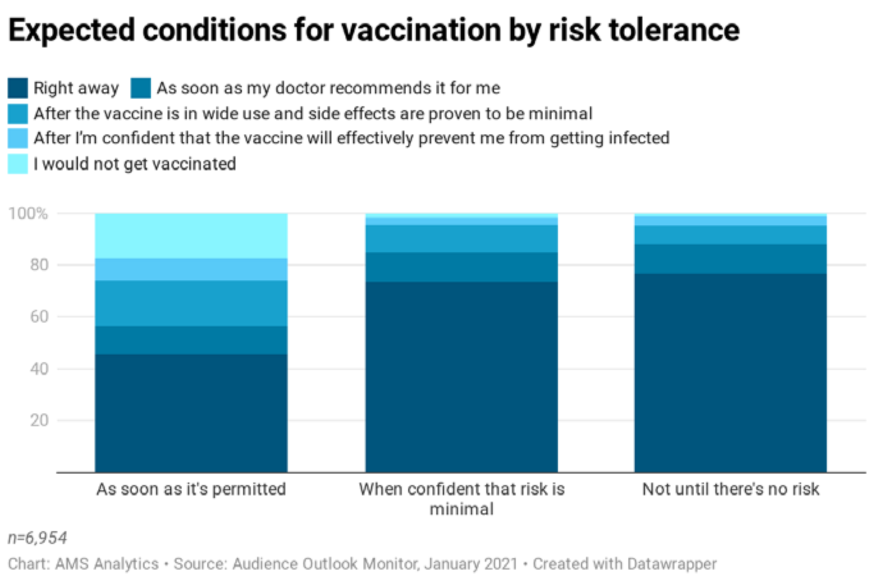

Fig 6: Expected conditions for vaccination (by risk tolerance)

Age also has a notable impact on perspectives towards vaccination. As of mid-January, eight in ten respondents over age 65 say they will be vaccinated right away, up from only half in December. Once vaccinated, a greater portion of elderly respondents are more likely to resume arts attendance after they are *"certain they have developed immunity"*, while younger respondents are less concerned about their personal immunity.

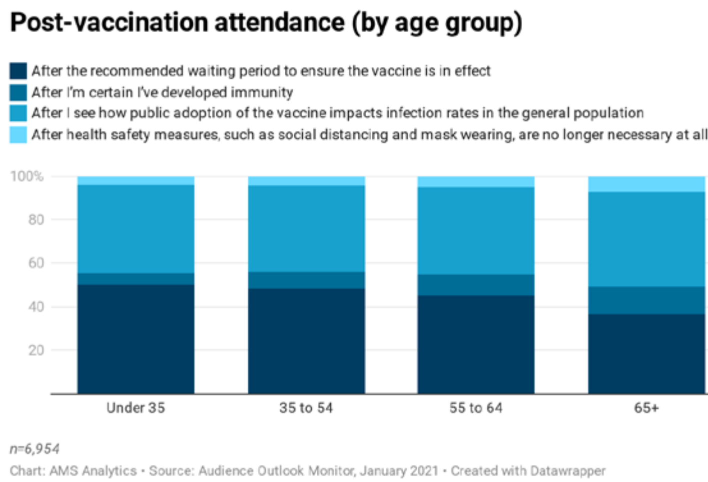

Fig 7: Expected conditions for resuming attendance (by age group)

Additionally, respondents who are less eager to return are also more personally cautious, awaiting personal immunity or taking care to observe the actual impacts of the vaccine with time. Only about one quarter of respondents who are 'not at all eager' to return, will in fact return after the recommended waiting period.

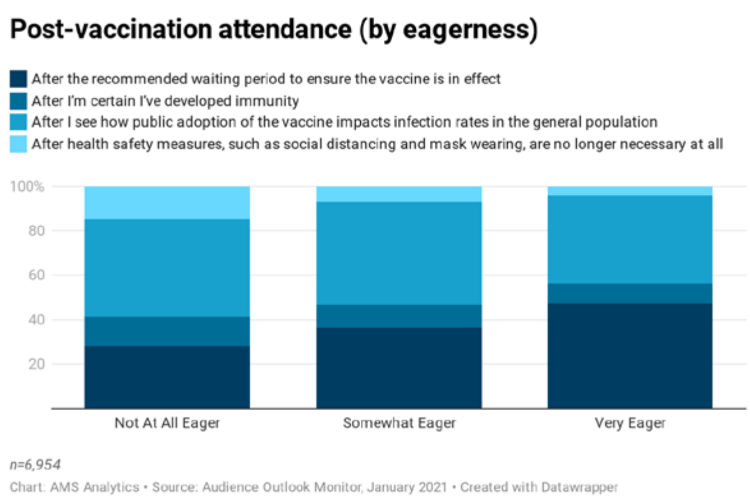

Fig 8: Expected conditions for resuming attendance (by eagerness to return)

Digital behavior reflects support for organizations and is motivated primarily by entertainment value

Seven in ten respondents prefer to view fully staged performances via an on-demand, "made for screen" recordings with no interactive features.

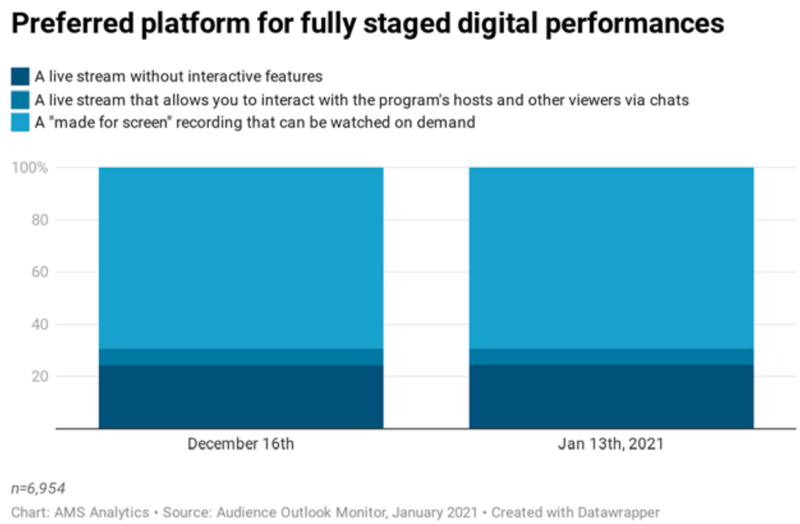

Fig 9: "Interactive vs. Recorded: When viewing fully staged performances, would you prefer...?"

Above all else, respondents are most interested in fully staged online performances, and 69% prefer a "made for screen" experience for stage performances. However, respondent's preferred digital platform features shift based on the type of programming offered. One third of respondents are interested in a more interactive platform specifically for talks, interviews, or discussions, and one quarter prefer the interactive platform for art appreciation programs online.

Overall, most respondents say they are discerning about the content they choose to view online: more than half claim to be selective, occasional viewers, and more than one third agree that they would benefit from content recommendations from a trusted source.

Of specific interest is the greater percentage of respondents with a *"strong bond"* to their organization, as well as older respondents, who prefer online programming sourced from around the country and around the world. In contrast, younger respondents tend to prefer online programs featuring local artists.

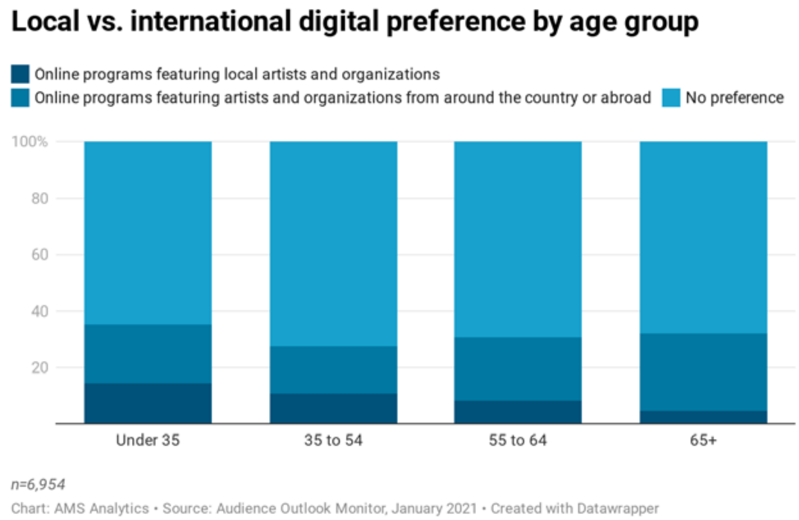

Fig 10: "Local vs. International: when watching digital streams and recordings of arts and culture programs, do you prefer...?" (by age group)

Nearly eight in ten **respondents expect to pay $25 or less to access streaming content.**

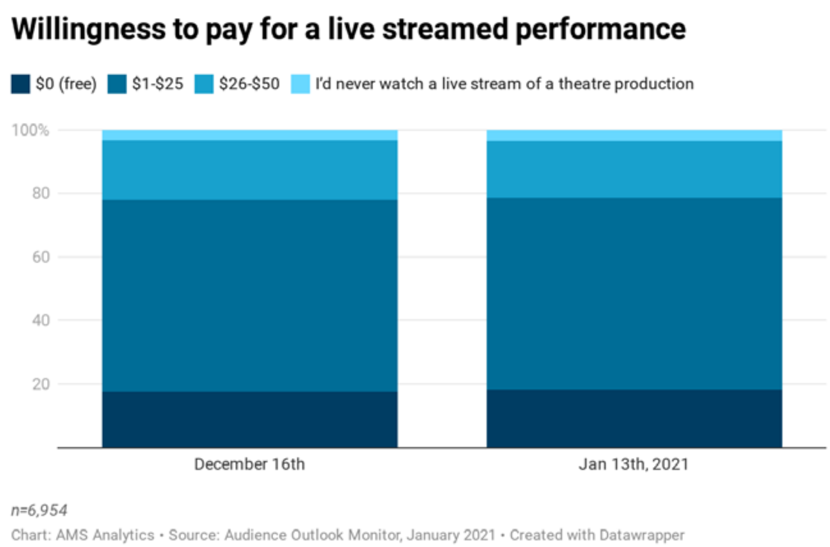

Fig 11: "What's the most you'd be willing to pay for access to a live streamed performance?"

In the past two weeks, one in five respondents report having paid for or contributed dollars to online programming. In most cases, this payment involved a one-time fee or voluntary donation. Respondents who report they are *"not at all eager"* to return are nearly twice as likely to expect free content, compared to those who are *"very eager"* to return.

Respondents who report a *"strong bond"* with their organization also tend to express more interest in engaging with and paying for digital content. 28% of respondents with a *"strong bond"* have watched and paid for online programs in the past two weeks, versus only 14% with a weak bond.

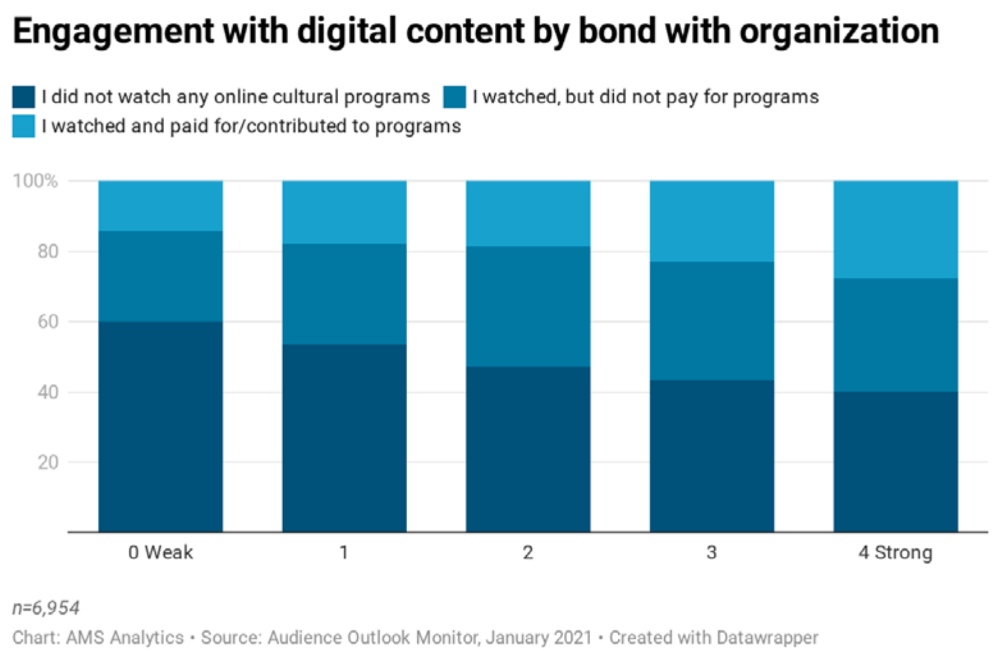

Fig 12: Engagement with online cultural programs in the past two weeks (by bond with organization)