



**AUDIENCE
OUTLOOK
MONITOR**

Snapshot Report

All Cohorts

Published December 2021

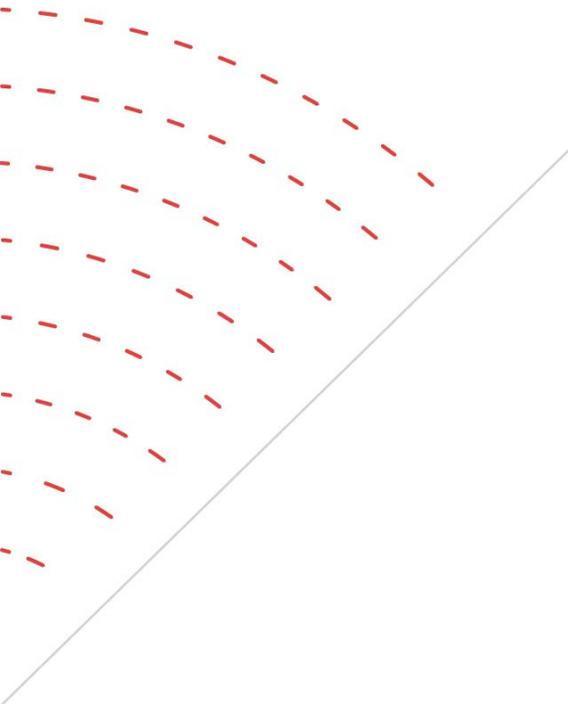


Table of Contents

About this Study	3
Participating Organizations	4
Overview of Results	6
Survey Responses	6
Executive Summary.....	7
<i>Comfort is on an upward trajectory, with increasing attendance under any circumstances and more than half currently attending</i>	<i>8</i>
<i>Nearly eight in ten who attended programs felt comfortable with their experience in October</i>	<i>10</i>
<i>Positive feelings about attending under the conditions grow, while interest in vaccinated-only admittance is leveling out</i>	<i>12</i>

About this study

This snapshot report updates key findings using the November 2021 deployment 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 and comfort in venues, perspectives on vaccination and resuming attendance, and experience with digital content. This report reflects data collected by all participants in the AOM study, as indicated in the following pages.

Participating Organizations

Organization Name	City
Arena Stage	Washington, DC
Aronoff Center for the Arts	Cincinnati, OH
AT&T Performing Arts Center	Dallas, TX
Bass Performance Hall	Fort Worth, TX
Blumenthal Arts	Charlotte, NC
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
Hult Center for the Performing Arts	Eugene, OR
Hylton Performing Arts Center	Manassas, VA
Jazz at Lincoln Center	New York, NY
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
Midland Center for the Arts	Midland, MI
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
Penn Live Arts	Philadelphia, PA
Pittsburgh Cultural Trust	Pittsburgh, PA
Playhouse Square	Cleveland, OH

Round House Theatre	Washington, DC
Roundabout Theatre Company	New York, NY
Segerstrom Center for the Arts	Costa Mesa, CA
Signature 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 Smith Center	Las Vegas, NV
The Soraya, Cal State Northridge	Northridge, CA
The Tobin Center for the Performing Arts	San Antonio, TX
Walton Arts Center	Fayetteville, AR
Wolf Trap	Vienna, VA

Overview of results

82%

of those who experienced live in-person indoor performances in the past two weeks say they were 'comfortable' or 'very comfortable' with the experience

49%

purchased tickets, subscriptions or memberships for live music events in mid-November

59%

are already attending in-person programs

30%

of vaccinated respondents are waiting to attend until infection rates drop

72%

say they would be more likely to attend or would only attend given vaccinated-only admittance policies

88%

say that online programs will play a small role or no role in their cultural life once facilities reopen

Survey Responses

48

Participating
Performing Arts Centers and
Producers

8,334

Total responses
(November 17)

Executive Summary

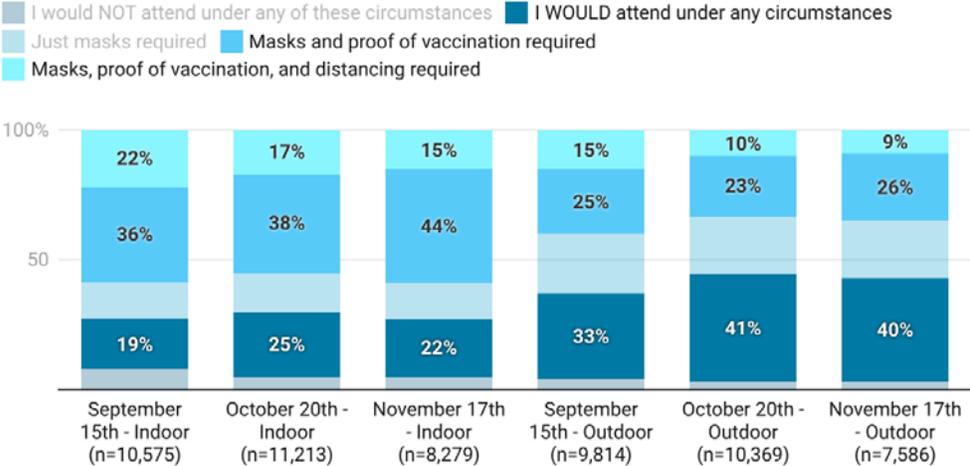
Attendance and purchases continue to climb. Four in ten respondents have attended in-person performances, nearly all of which are indoors. Comfort levels with the health and safety experience at attended programs also remain high, and those who felt uncomfortable with recent in-person experiences recognize that most venues are doing all they can to protect patrons.

Specific concerns around the safety of large group gatherings and the duration of immunity are maintained, and likely drive continued interest in vaccinated only admittance and masking policies.

Comfort levels have plateaued in November, but attendance and purchases continue to climb

Similar to October figures, 40% say they would attend outdoors under any circumstances. Comfort indoors is slightly lower; while 55% expected at least masks and vaccination in October, now 59% expect the same indoors. The slight uptick is likely due to impending weather and holidays causing more to gather indoors.

Minimum requirements for attending indoors/outdoors this week



n=8,334 (Nov 17)
 Chart: AMS Analytics • Source: Audience Outlook Monitor, November 2021 • Created with Datawrapper

Fig 1: “What are the minimum health safety measures that you require in order to attend an indoor/outdoor cultural event this week?”

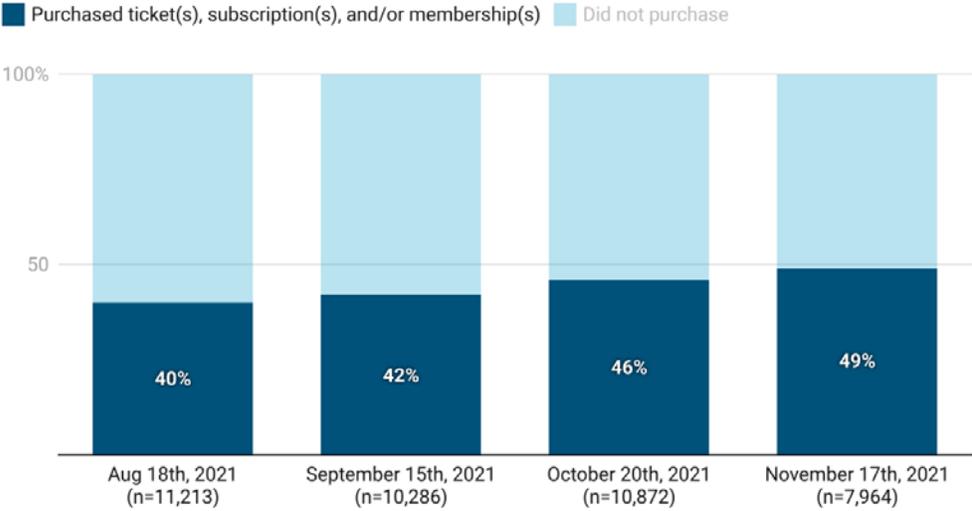
Those with a strong bond with their organization tend to have heightened expectations around current attendance. As of November, 65% possessing a strong bond with their organization expect masking and proof of vaccination policies indoors, versus only 43% of weakly bonded patrons.

Also, 72% of elderly patrons over age 65 expect at least masking and proof of vaccination policies indoors, versus only 48% of those under age 35.

Patrons in the Northeast region are even more zealous in their expectations around masks and proof of vaccination for current attendance than they were in October. 76% of audiences in the Northeast region expect masking and proof of vaccination to attend indoors now.

Purchase rates continue their steady upward trajectory, with 49% of audiences purchasing tickets, subscriptions, and / or memberships in November.

Cultural purchases in the past two weeks



n=8,334 (Nov 17)
Chart: AMS Analytics • Source: Audience Outlook Monitor, November 2021 • Created with Datawrapper

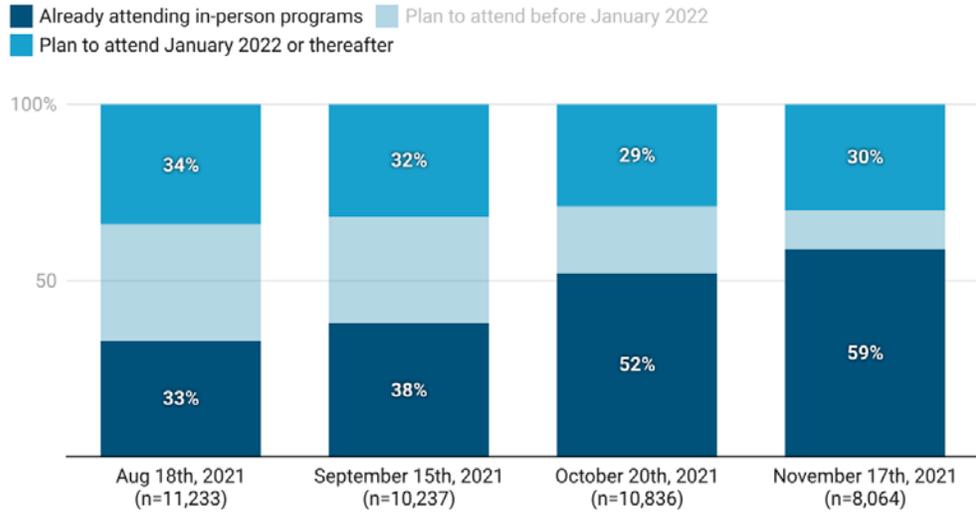
Fig 2: "In the past two weeks, did you make any cultural purchases?"

We continue to observe a strong divide between strongly bonded and weakly bonded patrons in terms of purchasing. 56% of strongly bonded audiences made purchases in early November, versus only 36% of weakly bonded patrons.

Interest in tickets for live theater and dance have seen growth among the 'under 54' demographic in recent months. In both October and November, more than one third of younger respondents (both under 35 and 35-54) have made single ticket theater or dance purchases, whereas less than a quarter in the age group had made similar purchases in early autumn.

Projected attendance also continues to climb. Up from 52% who were already attending in October, 59% reported that they were attending currently in November, and another 11% plan to attend before the end of the year. Meanwhile, the remaining 30% plan to wait until the new year to attend in-person events.

When will you attend in-person performing arts programs?



n=8,334 (Nov 17)

Chart: AMS Analytics • Source: Audience Outlook Monitor, November 2021 • Created with Datawrapper

Fig 3: “When do you think you will resume attending in-person performing arts programs?”

Current attendance is driven by the 68% of strongly bonded patrons who are already attending in-person programs. Less than 60% of patrons with a weaker self-reported bond are currently attending.

Older patrons are still the most cautious, though current attendance among the age group is growing. About one third over the age of 65 still plan to delay their attendance to 2022, while 52% are now attending. Meanwhile, 70% of those under age 35 are currently attending.

When it comes to trust in the institution, overall figures are consistent with recent months: about 3 in 4 continue to trust their institution to enforce health and safety rules for audience members. Institutional trust remains overwhelmingly strong among those with the strongest self-reported bond; now 88% of strongly bonded patrons trust the institution, whereas only 50% of those with a weak bond say the same.

Strong levels of comfort with in-person event experiences continue through November

Four in ten respondents attended a live performance in November, and nearly all of these performances were indoors. Overall comfort levels with live experiences remain strong: 82% of indoor attendees, and 87% of outdoor attendees rated their experience as ‘comfortable’ or ‘very comfortable’ in terms of health safety.

Overall, how comfortable did you feel at the indoor/outdoor event in terms of your health safety?



n=8,334 (Nov 17)

Chart: AMS Analytics • Source: Audience Outlook Monitor, November2021 • Created with Datawrapper

Fig 4: “How comfortable did you feel at the (indoor/outdoor) event in terms of your health safety?”

Those who felt only ‘somewhat comfortable’ or ‘not comfortable’ in the theater express that their organizations are doing everything they can in most cases, and that the lack of comfort is more about personal anxieties:

“I don’t know what the organization could have done...”

“They did everything they could, it’s just personal anxiety”

“They were doing it --- required proof of vax and masks, and ushers were actively enforcing mask-wearing. It just

didn't feel normal yet to be out shoulder to shoulder with people. I think that will require repetition."

Still, some others are concerned about sufficient social distancing and mask wearing throughout performances:

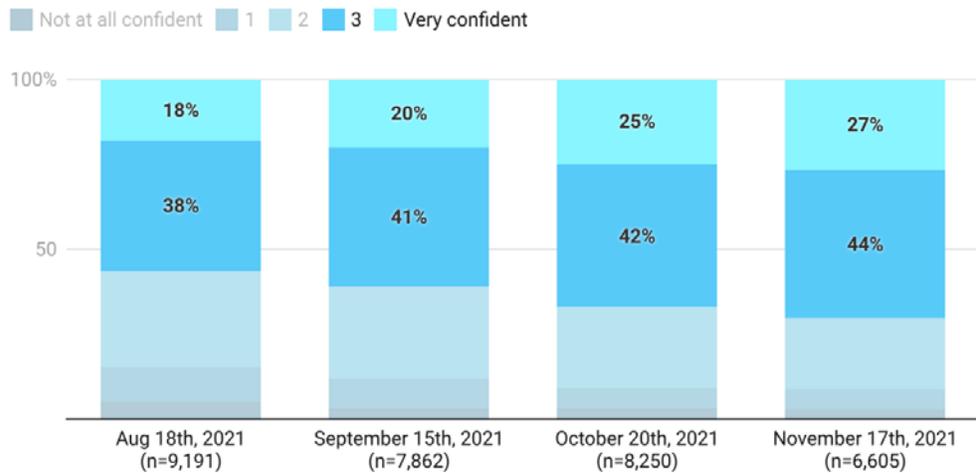
"More distance in seating."

"Enforce masking rules."

Some concerns are maintained, driving continued interest in vaccinated-only admittance and masking policies

Confidence continues to rise steadily, with 71% of vaccinated respondents claiming that they are confident in the protection of the vaccine.

How confident are you that you are protected enough from COVID-19 to resume your normal activities?



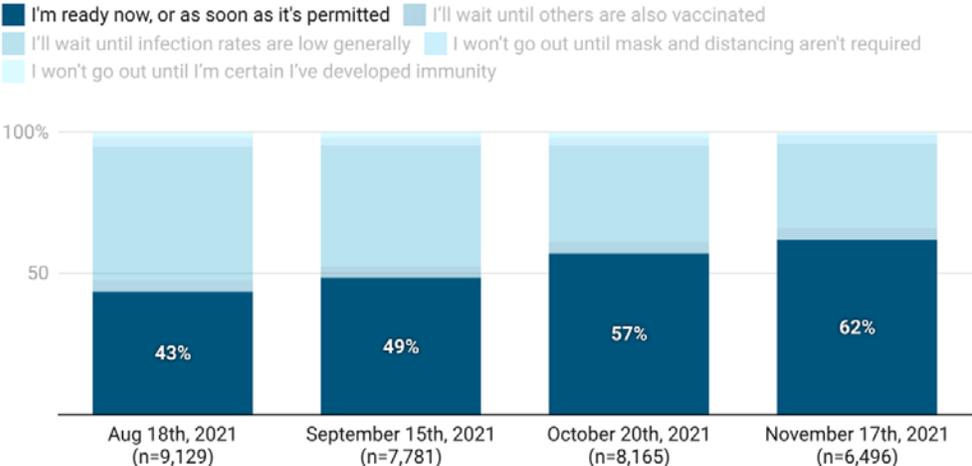
n=8,334 (Nov 17)

Chart: AMS Analytics • Source: Audience Outlook Monitor, November 2021 • Created with Datawrapper

Fig 5: "How confident are you that you are protected enough from COVID-19 to resume your normal activities?"

Positive feelings about current conditions have also risen even further than in October, with 62% now saying they are ready to attend now or as soon as permitted.

How do you feel about going out to cultural events? (vaccinated)



n=8,334 (Nov 17)
 Chart: AMS Analytics • Source: Audience Outlook Monitor, November 2021 • Created with Datawrapper

Fig 6: “Now that you’ve been vaccinated, which statement best reflects how you feel about going out to cultural events?”

While overall concerns continue to drop, more with a strong bond feel confident enough to attend now. 72% of patrons possessing a strong bond with their organization are prepared to attend right now, versus only 56% of weakly bonded patrons.

Meanwhile, differences between age groups on the issue of infection rates are diminishing. 33% of patrons over the age of 65 say they will wait to attend until infection rates drop, and 26% of those under 54 say the same, a smaller gap than in previous months.

Concerns about transmission and breakthrough infections continue their steady decline, while concern about large group gatherings and the duration of immunity have plateaued. One quarter of respondents in both October and November expressed their strong concern that it is still not safe to gather in large numbers, and one in five are *very concerned* about the duration of their immunity.

Up from 51% in October, 56% now consider proof of vaccination or a negative COVID-19 test to be a prerequisite for attending, while 50% expect masks at indoor events.

Prerequisites for attending this week

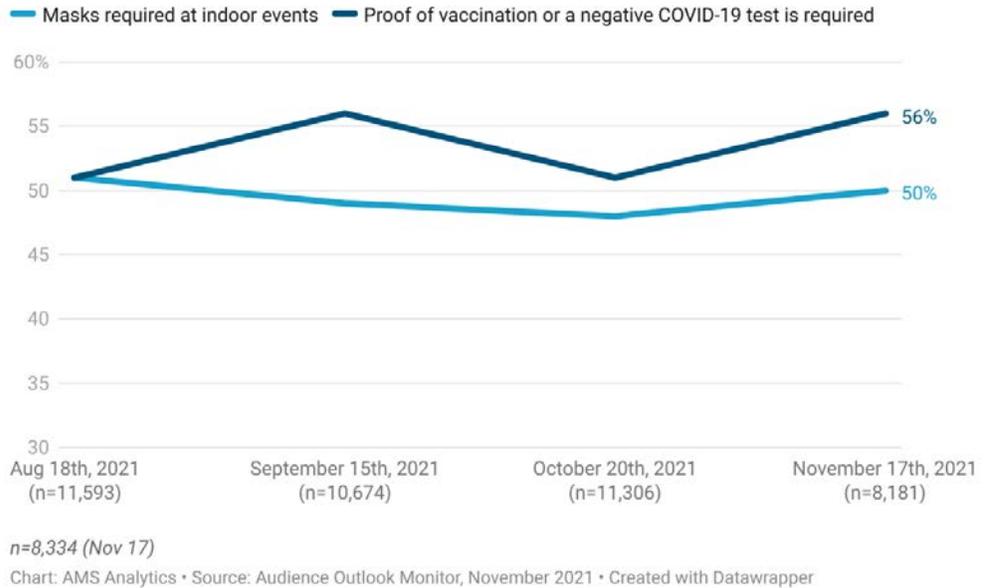


Fig 7: “Which of the following policies are prerequisites for you to attend an in-person event this week?”

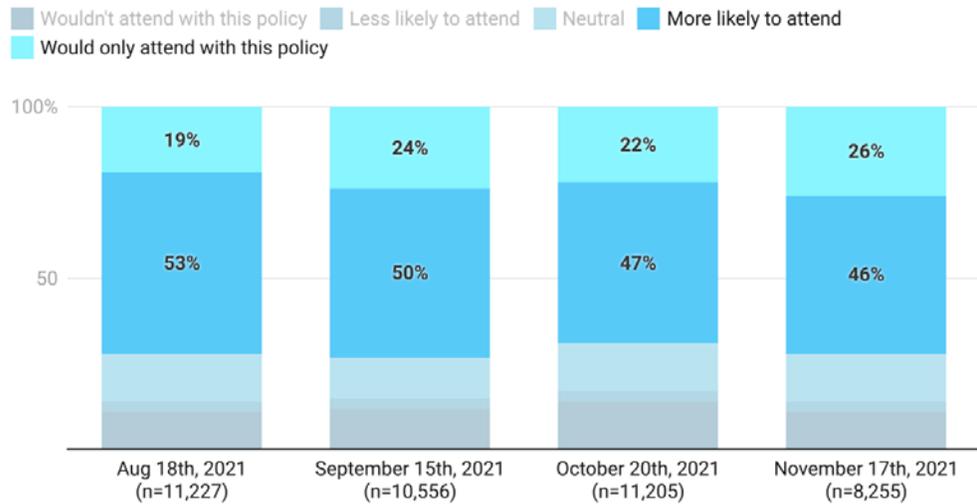
Proof of vaccination or a negative test is a prerequisite for 62% of strongly bonded patrons. The same is true of only 41% of weakly bonded patrons.

Age is also a motivating factor in considering vaccine and testing requirements as a prerequisite. Two thirds of patrons over the age of 65 consider the policies as prerequisite, while only half of younger audiences feel the same way.

Proof of vaccination or a negative test remains a prerequisite for 74% of patrons in the Northeastern states, whereas less than half of those in the South or Midwest consider the policy a prerequisite.

Back up slightly from 69% in October, now 72% of patrons say they would be more likely to attend given vaccinated-only policies; this 72% includes about one in four who say they would only visit the venues with a vaccination policy in place.

"How would vaccinated-only admittance policies impact your feelings about attending in-person events?"



Created with Datawrapper

Fig 8: "How would a vaccinated-only admittance policy impact your feelings about attending in-person events?"

Those who say they would only attend with this policy cite their personal comfort and safety, and a lack of trust of others:

"I do not trust the honor system in today's society...and unless we get a handle on this virus, it will continue to hobble us for another year...or more."

Older patrons continue to drive required vaccinated-only admittance, with a growing 34% over age 65 saying they would require the policy in order to attend.

When asked about overall feelings regarding organizations who implement vaccinated-only policies, 70% say they hold a positive view of the policies, a figure which has remained consistent since the summer.

Strongly bonded patrons continue to drive this perception, with 76% of those with a strong bond viewing the organization positively in light of vaccine policies; meanwhile, only 56% of those with a weak bond feel the same way.

Also, up from 58% in October, the positive perception among younger audiences has leveled to 63% for those under age 35.