



AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

Published July 2022

This report reflects data collected nationwide in June 2022 as part of the Audience Outlook Monitor study of arts audiences, in collaboration with WolfBrown

Survey Responses

37

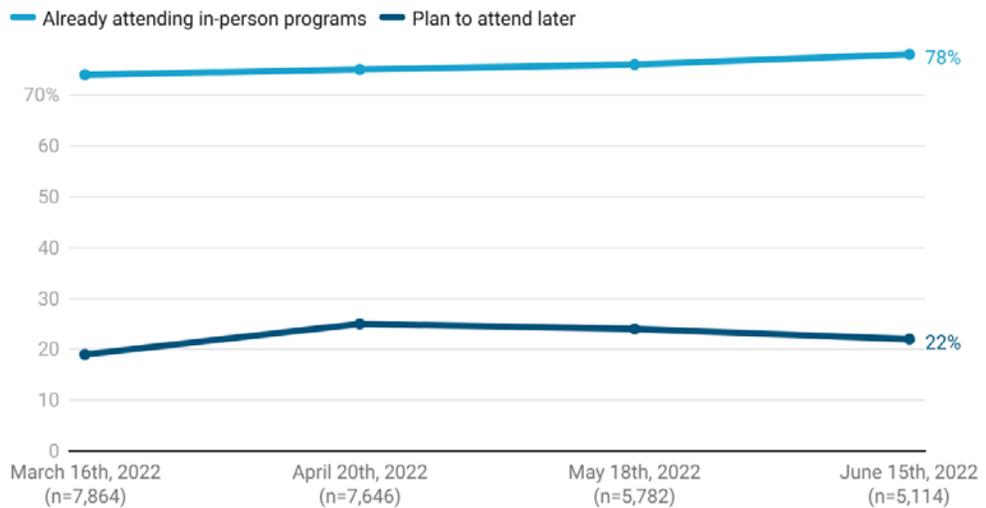
**Participating
Performing Arts Centers and
Producers**

5,349

**Total responses
(June 15)**

As the bump in COVID cases resides, comfort increases; but inflating costs are causing a plateau in purchases and increased cost barriers to attendance

When will you attend in-person performing arts programs?



n=5,349 (Jun 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, June 2022 • Created with Datawrapper

Fig 1: “When do you think you’ll resume attending live performing arts programs?”

Sentiments about current attendance are holding steady: in June, **78% reported that they are currently attending**, compared to 76% in May. The oldest patrons remain the most cautious of any age cohort; compared to 85% of those under age 35, only 72% over age 65 are already attending in-person programs; this includes 18% of those over age 65 who plan to wait until September or later to attend. Black and African American patrons are also notably more cautious than other races: 30% of Black patrons are waiting to attend, including 20% who will wait until September or later.

Comfort levels continue to rise at both indoor and outdoor venues. As of June, **67% say they would feel ‘very comfortable’ at an outdoor festival or concert**, and **41% say the same of a large theatre or concert hall**; this represents a 7% increase in comfort outdoors, and a 9% increase in comfort indoors, relative to May figures.

The percentage of patrons who say they will attend under any health safety circumstances has risen, as May's bump in COVID cases declines. Compared to 38% in May, **42% in June say they will attend indoors under any circumstances.** Meanwhile, 54% still expect some safety regulation to be in place in order to attend indoors (at least masks).

Caution is driven by patrons in the coastal Northeast and Western regions, while more are inclined to attend under any circumstances in the South (42%) and Midwest (55%). Also, Black and African American patrons tend to be more cautious than patrons of other races: 74% expect that at least some safety regulations be in place in order to attend.

Purchases remain on a plateau, with **51% of respondents having purchased tickets or subscriptions in mid-June.** In June, 66% of audiences with a self-reported 'strong' organizational bond made purchases, versus 42% with a weak bond. Though the difference in purchases by age is evening out (about half across all ages made purchases in June), younger patrons tend to purchase *live music single tickets* more frequently, while older patrons more frequently purchased *subscriptions and memberships*. Also, a greater 41% of Hispanic / Latinx respondents purchased *live music single tickets*, compared to less than 28% of patrons of other races. Less than in May, 53% of all patrons who bought tickets in June purchased them more than a month in advance of the event.

Although COVID concerns are at the front of mind for 35% of patrons who have yet to attend, **program interest, cost, and difficulty making plans** remain the other dominant barriers interfering with attendance:

48% have not yet found a program they want to attend. This figure is consistent with May, and is pronounced among those with a weaker bond: while about 35% with a 'strong' bond report that they have not found a program of interest, 57% with a weak bond say the same. Also, an outsized 56% in the Midwest cite this barrier.

35% report concerns about contracting or transmitting COVID-19 in June, compared to 41% in May. 41% of patrons possessing a strong bond with their organization remain concerned about COVID, compared to only 28% with a weak bond. In the Midwest, a smaller 27% are concerned about COVID.

A higher 23% report barriers around the cost of attending and personal budget limitations, compared to 18% in May. More in the Midwest share concerns about cost than in any other region. While about 20% of White and Black respondents share this concern, a greater 47% of Hispanics and Latinos, and 38% of Asian respondents consider cost to be a barrier to their attendance.

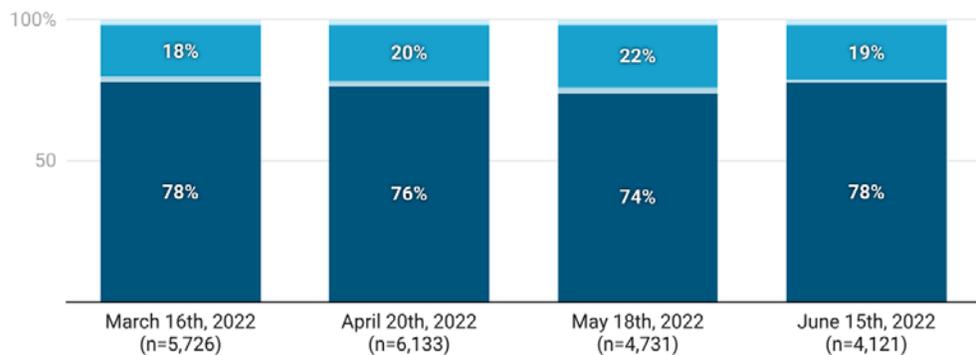
19% say making plans in advance is more difficult than it used to be, primarily due to the uncertainty of the pandemic.

Steady and effective communication continues, as **56% say their organization has done an 'excellent' job of staying in touch and communicating.** An additional 31% say communication is 'good'.

Concerns are dropping, but most patrons still support vaccine policies; strong regional differences in mask necessity endure

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

■ I'm ready now, or as soon as it's permitted
 ■ I'll wait until others are also vaccinated
■ I'll wait until infection rates are low generally
 ■ I won't go out until mask and distancing aren't required
■ I won't go out until I'm certain I've developed immunity



n=5,349 (Jun 15)

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Fig 2: "Which statement best reflects how you feel about going out to cultural events?"

More than 3 in 4 vaccinated patrons remain ready to attend now. Compared to 74% in May, **77% are ready to attend now.** 19% will wait for infection rates to

drop before attending. Hesitancy is more dominant among Asian and Black / African American patrons; only 69% of African American, and 70% of Asian patrons are ready now.

Health safety concerns are dropping for the first time since March:

- **22% are very concerned about the duration of their immunity**, compared to 24% in May.
- **19% are very concerned about their vulnerability to a 'breakthrough' infection**, compared to 22% in May
- **17% remain 'very concerned' about the safety of gathering in large numbers as of April**, compared to 18% in May.
- **16% are very concerned about transmitting the virus**, compared to 17% in May.

Interest in vaccinated-only admittance has returned to Spring 2022 levels: **61% of respondents are encouraged to attend by vaccinated only policies**, a figure which includes **10% who say they would only visit given this policy**. Interest in vaccinated-only policies remains strongest in the Northeast and Western regions where about one in seven say they would only attend events with this policy in place. Also, a greater percentage of Black patrons (65%) are 'more likely' to visit given proof of vaccination policies, than any other race.

Ticket policies, including re-seating, streaming, and booster-only admittance continue to be intriguing to ticket buyers. The option to be re-seated in an emptier section at the last minute motivates ticket purchases for 56% of audiences, while the last-minute option to watch a livestream instead of attending a ticketed performance motivates an increasing 37% of respondents to purchase tickets. **Overall, 54% still say that booster-only admittance policies would have an influence on their purchase of individual tickets** in the near future.

Compared to 54% in May, **49% overall believe that mask mandates are necessary for theaters and concert halls in their communities right now**, whether with or without a proof of vaccination policy. Black patrons are more likely to support the necessity of masks; 67% of African American respondents say that masks are still necessary in their communities.

Nearly all regions saw decreases in the need for masks since May, except in the South where half remain convinced that they are necessary in their community:

Region	June	May
<i>Northeast</i>	62%	72%
<i>West</i>	52%	61%
<i>South</i>	51%	51%
<i>Midwest</i>	36%	40%

Comfort levels with current attendance are holding steady; in both May and June, **57% of respondents who have attended report that they were 'very comfortable' with their in-person experience.**

For those who were less than 'comfortable' at a performance in June, the most dominant concerns continue to be centered around masking and distancing:

"Since all seats are filled (no distancing), I would have preferred mask mandate."

"Ask the unmasked patrons one row away who were eating during the entire play to put their food away and put their masks on."

"There were too many people, and people kept removing their masks despite it being mandatory."