



**AUDIENCE
OUTLOOK
MONITOR**

Snapshot Report

All Cohorts

Published November 2021

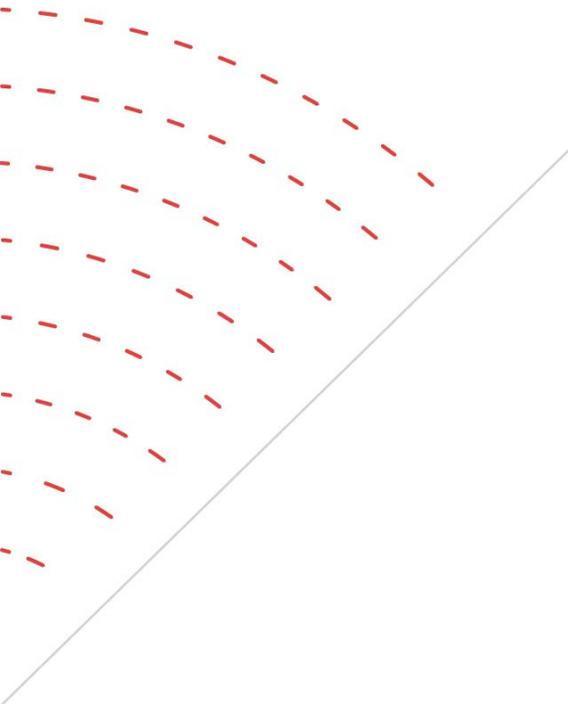


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About this study

This snapshot report updates key findings using the October 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
Seegerstrom 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

79%

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

46%

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

52%

are already attending in-person programs

34%

of vaccinated respondents are waiting to attend until infection rates drop

69%

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

47

Participating
Performing Arts Centers and
Producers

11,338

Total responses
(October 20)

Executive Summary

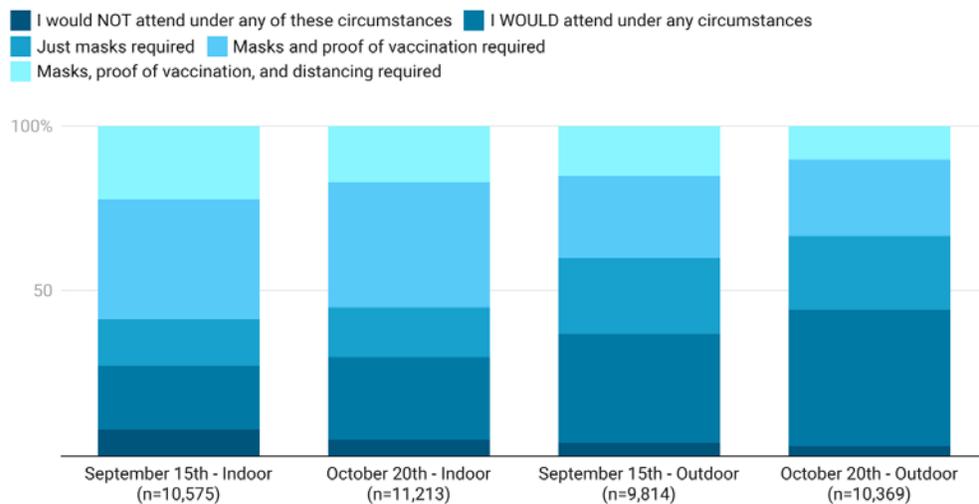
Overall comfort is increasing, with resulting current attendance and purchases on the rise. A marked increase in current attendance has resulted in more than half of audiences saying they are currently attending in-person programming. Comfort levels with the health and safety experience at attended programs also remain high, though some believe that enforcement of health policies, including masking and distancing, could be better.

Though confidence in the vaccine is increasing and concerns about gathering in large numbers have dropped significantly, the overall enthusiasm about vaccinated-only admittance has reached a plateau, with about half of audiences saying they are more likely to attend and another 22% saying they would only attend given the policy.

Comfort is on an upward trajectory, with increasing attendance under any circumstances and more than half currently attending

Up from 33% in September, 41% say they would attend outdoors under any circumstances. Also, compared to 19% in September, 25% would now attend indoors under any circumstances.

Minimum requirements for attending indoors/outdoors this week



n=11,338 (Oct 20)

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 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?”

The northeast continues to drive attendance stipulations around masks and proof of vaccination for current attendance; nearly three quarters of audiences in the northeast expect masking and proof of vaccination indoors this week.

Meanwhile, purchase continue to increase, with 46% of audiences purchasing tickets, subscriptions, and / or memberships in October.

Cultural purchases in the past two weeks



n=11,338 (Oct 20)

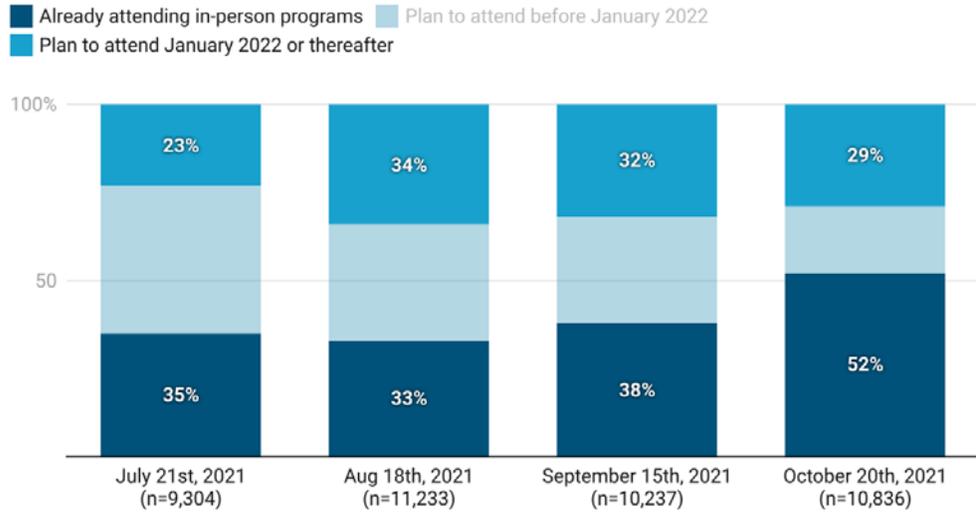
Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2021 • Created with Datawrapper

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

As we have observed in recent months, patrons with a strong bond are more inclined to buy; 54% of strongly bonded audiences made purchases in the past two weeks of October.

Whereas only 38% reported in-person attendance in September, now over half (52%) of patrons are attending in person events. Also, the turnaround continues for a 2022 attendance horizon: only 29% now plan to wait until the new year to attend.

When will you attend in-person performing arts programs?



n=11,338 (Oct 20)

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

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

Older patrons are still the most cautious. About one third over the age of 65 plan to delay their attendance to 2022, and 43% are currently attending, versus 65% under age 35.

When it comes to trust in the institution, overall figures are consistent with recent months: about 7 in 10 continue to trust their institution to enforce health and safety rules for audience members. Institutional trust remains strongest among those with the strongest self-reported bond; now 87% of strongly bonded patrons trust the institution, whereas only 41% of those with a weak bond say the same.

Nearly eight in ten who attended programs felt comfortable with their experience in October

79% of indoor attendees, and 84% of outdoor attendees rated their experience as comfortable or very comfortable.

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



n=11,338 (Oct 20)

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

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

Meanwhile, the remaining 20% felt only somewhat comfortable or not comfortable in the theater, due primarily to a lack of rule enforcement:

"Should have provided social distancing between the people in front of me and behind me, they were at arm's length and weren't wearing masks. As a result, I left the performance early."

"Make proof of vaccination mandatory, make masks mandatory and check that people are complying."

"Enforce mask wearing in the theater."

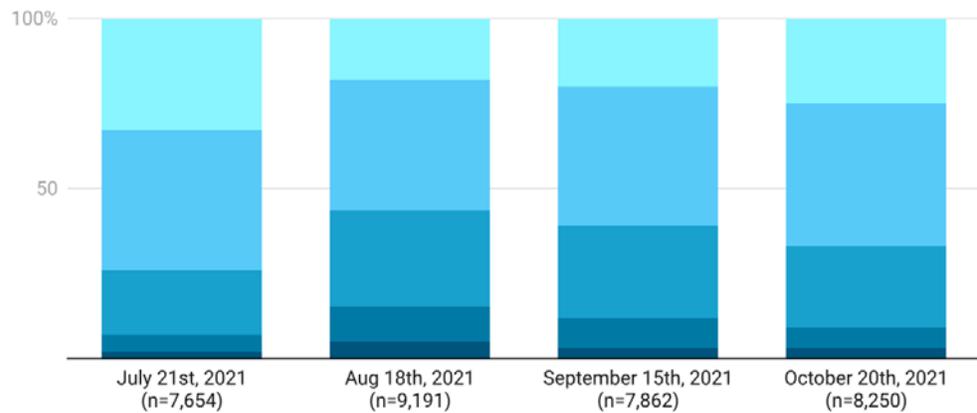
"Most people were not wearing a mask and there was no social distancing. Without social distancing, masks would have made me much more comfortable. I wore one. Sort of one or the other...distance or mask."

Positive feelings about attending under the conditions grow, while interest in vaccinated-only admittance is leveling out

Confidence continues to rise, with two thirds 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?

■ Not at all confident ■ 1 ■ 2 ■ 3 ■ Very confident



n=11,338 (Oct 20)

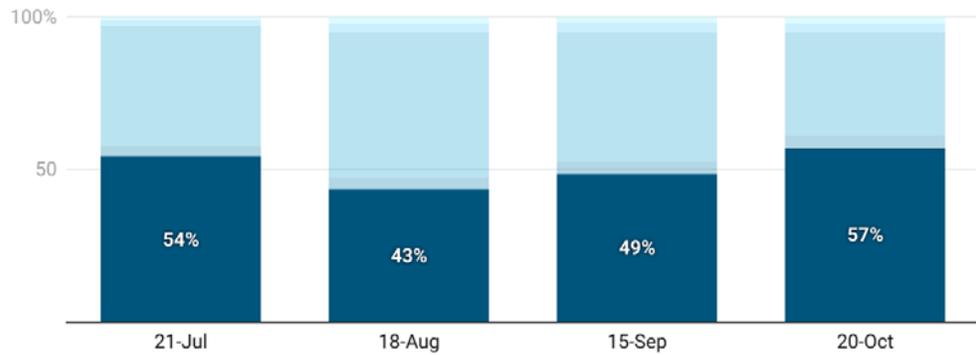
Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2021 • Created with Datawrapper

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

Positive feelings about current conditions are also rising, with 57% saying they are ready to attend now or as soon as permitted.

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=11,338 (Oct 20)

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 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 are dropping, feelings about attending still vary across certain patron segments; 69% of patrons possessing a strong bond with their organization are prepared to attend right now, versus only 49% of weakly bonded patrons. Also, 37% of patrons over the age of 65 say they will wait to attend until infection rates drop, whereas 28% or less under age 54 say the same.

While all concerns expressed by patrons have seen declines since September, the steepest decline has come among those who believe it is not safe to gather in large numbers. Whereas 35% said they were very concerned that it was not safe to gather in large numbers in September, now only 26% say the same. Lower levels of concern are presumably motivated by patrons’ positive experiences with larger crowds in recent months.

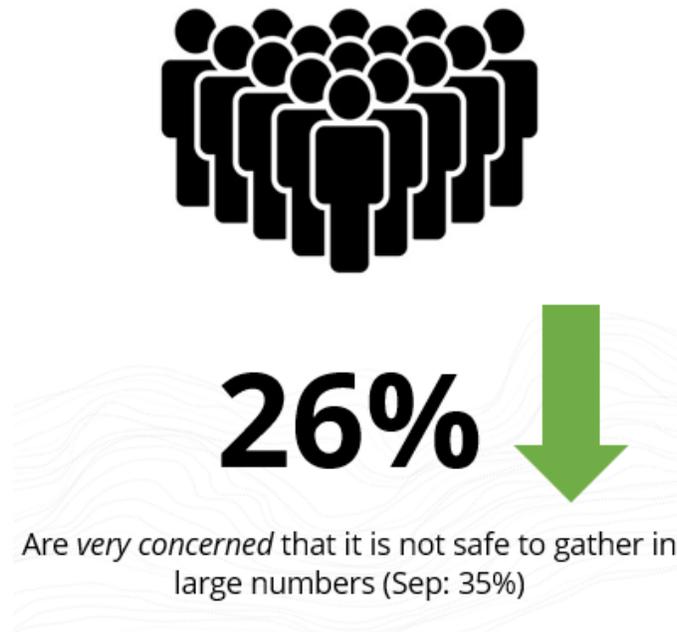
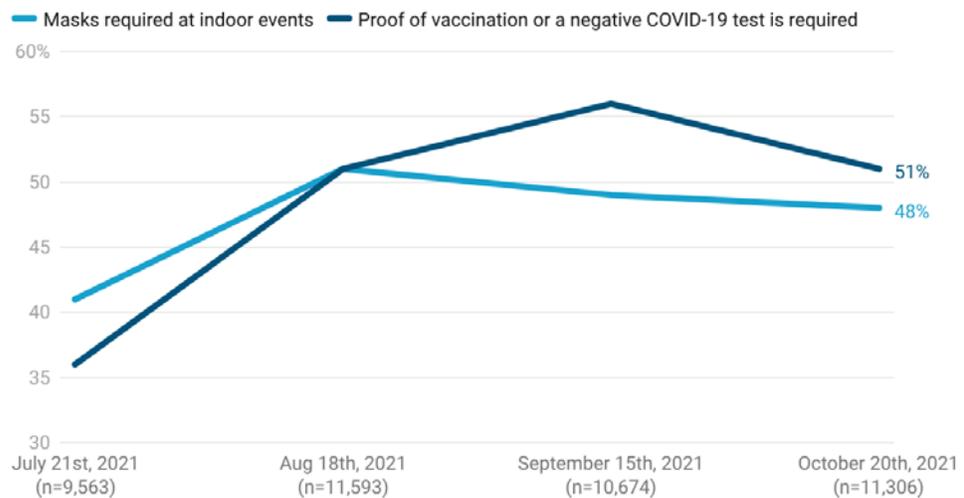


Fig 7: Significant decline in concerns about gathering in large numbers

Prerequisites for attendance are holding steady: 51% consider proof of vaccination or a negative COVID-19 test to be a prerequisite, and 48% expect masks at indoor events.

Prerequisites for attending this week



n=11,338 (Oct 20)

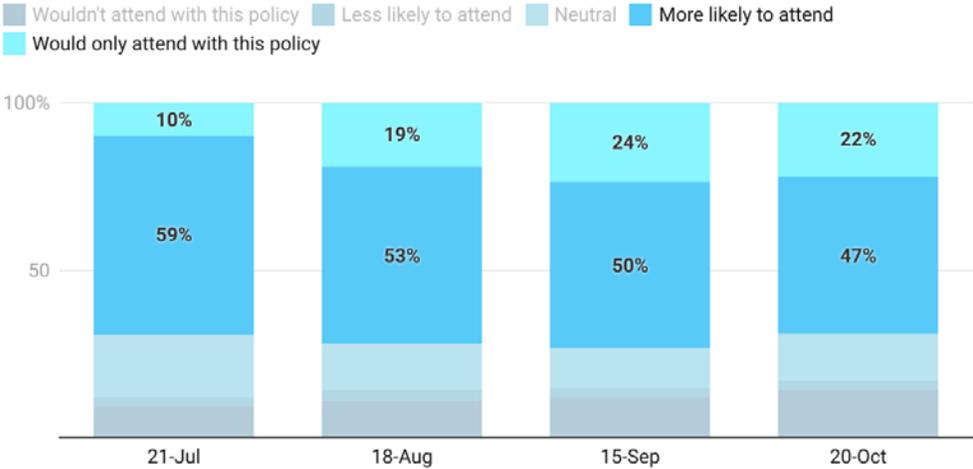
Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2021 • Created with Datawrapper

Fig 8: “Which of the following policies are prerequisites for you to attend an in-person event this week?”

Proof of vaccination or a negative test remains a prerequisite for more than 70% of patrons in the Northeastern states, whereas less than half of those in the Southern or Midwestern states consider the policy a prerequisite to attend.

The drive for vaccinated-only admittance is leveling out. Down from 74% in September, now 69% of patrons say they would be more likely to attend given vaccinated-only policies; this 69% includes about one in five 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?"



n=11,338 (Oct 20)
Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2021 • Created with Datawrapper

Fig 9: "How would a vaccinated-only admittance policy impact your feelings about attending in-person events?"

Older patrons continue to drive required vaccinated-only admittance, with 31% over age 65 saying they would require the policy to attend.

The positive perception of vaccinated policies is also leveling out. When asked about overall feelings regarding organizations who implement vaccinated-only policies, 66% say they hold a positive view of the policies; in September, the figure was 71%.

Strongly bonded patrons drive this perception, with nearly three quarters of those with a strong bond viewing their organization positively given vaccine policies; meanwhile, only 51% of those with a weak bond feel the same way.

Also, the positive perception among younger audiences has dropped steeply since last month. In September, 70% under age 35 said they view vaccine policies, and the organizations who employ them, positively. In October, that figure dropped to 58% among those under age 35.