



**AUDIENCE
OUTLOOK
MONITOR**

Snapshot Report

All Cohorts

May 2021

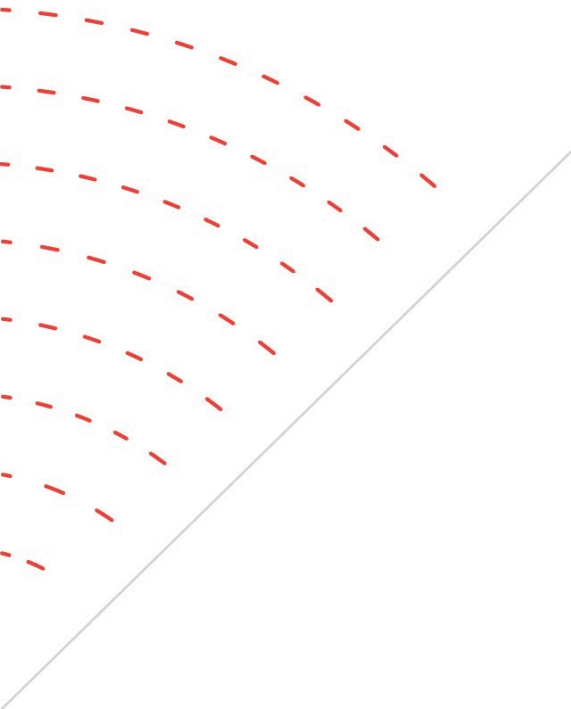


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About this study

This snapshot report updates key findings using the April 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 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
Annenberg Center	Philadelphia, PA
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
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

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	New York City, NY
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
Walton Arts Center	Fayetteville, AR
Wolf Trap	Vienna, VA

Overview of results

67%

would attend an in-person cultural event this week, given health safety protocols

12%

purchased single tickets for live music events in late April

92%

plan to attend as much or more than before the pandemic

81%

have been fully vaccinated

35%

of vaccinated patrons say they are still waiting for infection rates to drop before they attend in person

91%

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

Survey Responses

50

Participating
Performing Arts Centers and
Producers

9,534

Total responses
(April 28)

Executive Summary

Significant pent-up demand and increasing comfort are meeting more cultural offerings and resulting in ticket sales. About two-thirds of respondents feel comfortable attending cultural events immediately, and respondents are increasingly sharing their strong craving for live events in their open-ended remarks.

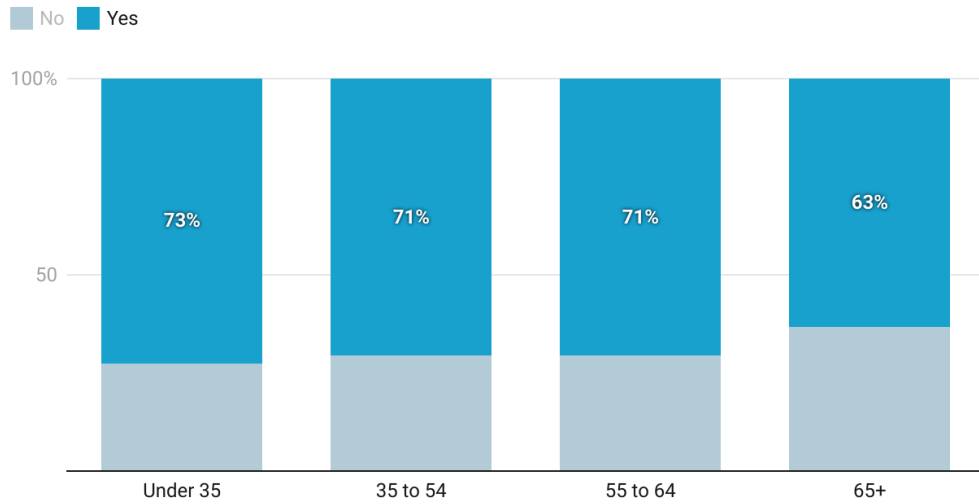
Though vaccination rates have skyrocketed in the last months, nearly four in ten vaccinated patrons are waiting for infection rates to drop before they attend. Meanwhile, overall long-term interest in digital offerings remains low. For the few who are highly interested in digital content once venues are open, the highest demand exists for access to digital staged performances and interactive offerings like education and artist talkbacks.

Demand is converting to revenue

Increased cultural offerings are meeting pent-up demand and growing comfort, resulting in boosted sales and return to live events. Two thirds of respondents say that they would attend an in-person cultural event this week, assuming health safety protocols are in place. This is up from only half of respondents who said the same in mid-March. Comfort with immediate attendance has increased steadily through winter into spring of 2021.

Elderly respondents remain more reticent about attending immediately. Only 63% of respondents over age 65 indicated that they would attend in-person cultural events immediately (assuming health safety protocols were in place), while greater than 70% of all younger respondent groups would attend immediately.

Would you attend an in-person cultural event this week?



n=9,534 (April 28)

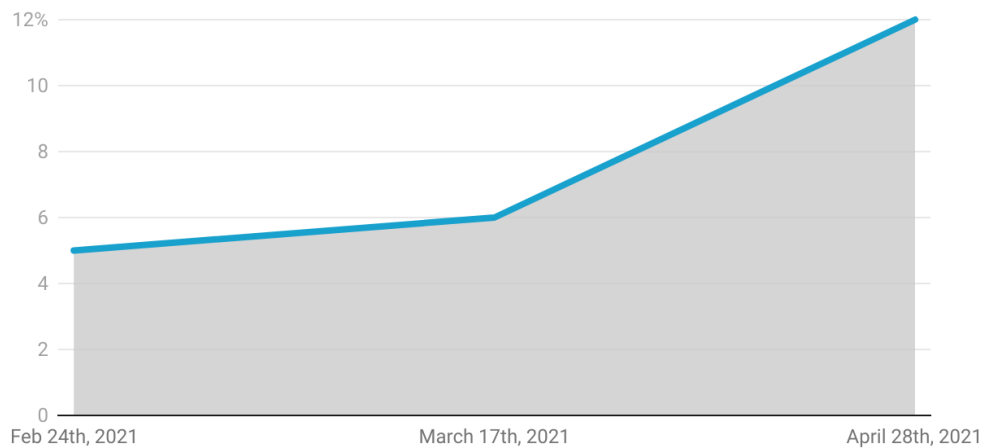
Chart: AMS Analytics • Source: Audience Outlook Monitor, May 2021 • Created with Datawrapper

Fig 1: "If given the opportunity, would you attend an in-person cultural event this week, assuming social distancing and other health safety procedures were required?" (by age cohort)

Growth has also been observed in recent purchase of cultural tickets¹, with the most notable growth observed in the purchase of *live music single tickets*. 12% of respondents purchased live music single tickets in late April, versus on 6% in mid-March.

¹ Respondents indicate purchase of cultural event tickets within 2 weeks of the survey

Percentage of respondents purchasing live music single tickets in the past two weeks



n=9,534 (April 28)

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

Fig 2: “In the past two weeks, did you purchase any [live music single tickets] for the future?”

Projected future attendance remains strong, with 92% of respondents indicating they plan to attend the same amount or more than before the pandemic.

Open-ended comments offered by those indicating more frequent future attendance are dominated by a sentimental yearning for the arts, and a desire to support artists:

“The last year of solitude has reminded me how much (the collective) we need the arts. I will never take arts and cultural activities for granted again and will reallocate my disposable income to ensure that I can seek, hear and do as much as possible.”

“I have realized what I love to do with my time, and cultural events make me happy.”

“I want to make up for lost time and I want to support the arts! It is such a valuable part of our community.”

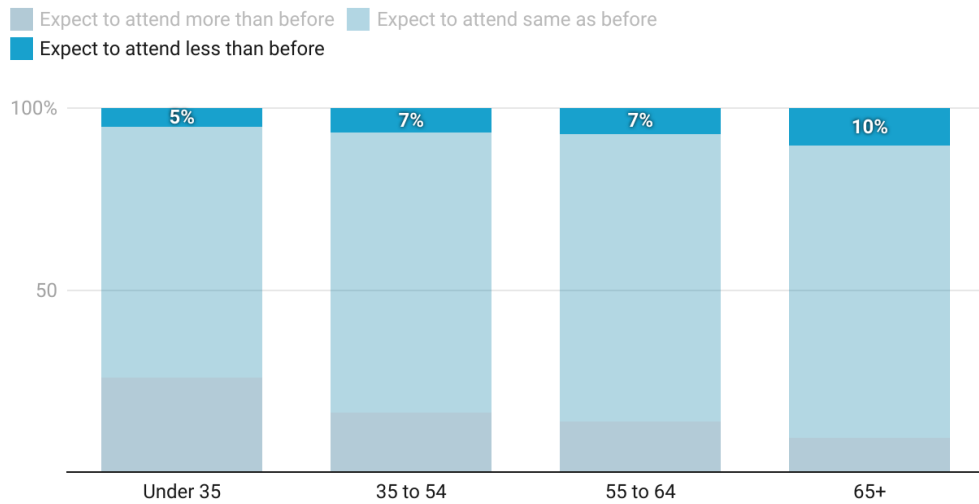
“You don't realize how much you enjoy something until it's taken away.”

“This past year has made me realize [that] live music and concerts and performances are so essential for the human soul and for mental and emotional and spiritual health.”

“To quote Joni Mitchell, ‘you don't know what you've got till it's gone.’ I will definitely make more of an effort to attend more shows and exhibits after the pandemic because 2020 showed us you never know when cultural opportunities will be taken away.”

That said, a greater percentage of older respondents remain hesitant to commit to the same or greater attendance in the future. 10% of those over age 65 say they will attend less than before the pandemic.

Long-term attendance projection



n=9,534 (April 28)

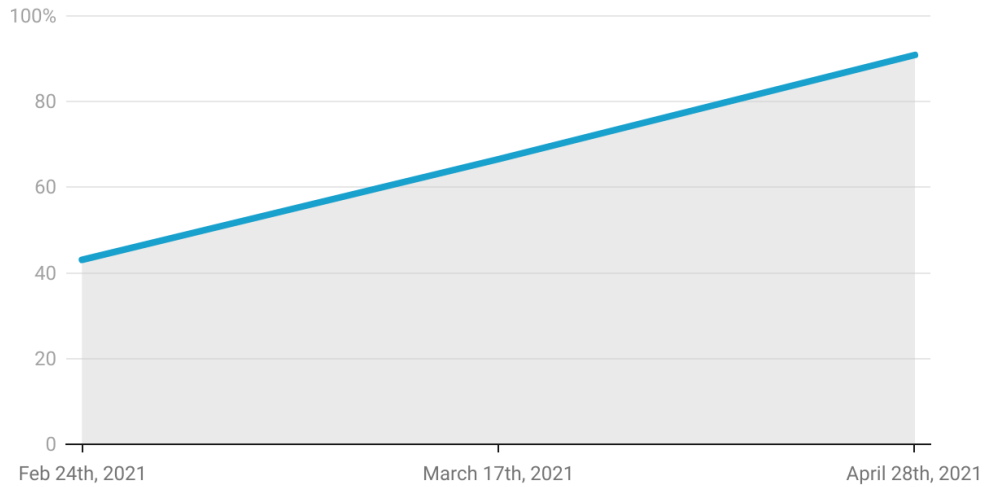
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Fig 3: “How will your attendance at arts and cultural activities be affected by the pandemic in the long-term, given your personal circumstances?” (by age cohort)

High vaccination rate amongst cultural arts audiences leads to increased comfort returning to venues

Vaccination rates continue to climb rapidly, with 81% of respondents indicating that they are fully vaccinated, and 10% partially vaccinated, as of late April.

Have you been vaccinated? (partially or fully)



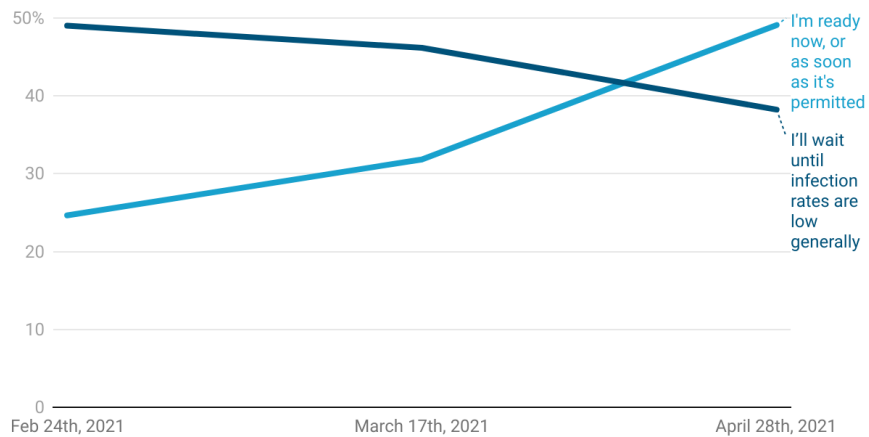
n=9,534 (April 28)

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

Fig 4: Vaccination progress

Half of vaccinated respondents are now ready to go out immediately, up from only 32% in mid-March. A lingering 38% say they are still waiting for infection rates to drop before they attend in person, despite being vaccinated themselves.

Attitudes regarding cultural attendance post-vaccination



n=9,534 (April 28)

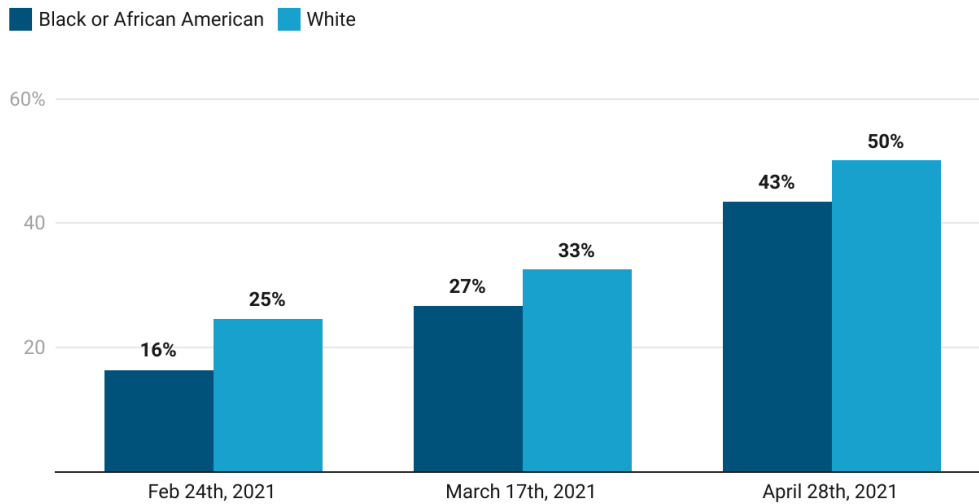
Chart: AMS Analytics • Source: Audience Outlook Monitor, May 2021 • Created with Datawrapper

Fig 5: "Now that you've been vaccinated, which statement best reflects how you feel about going out to cultural events?"

Older populations have been vaccinated at the highest rate (95% over age 65 are now fully vaccinated), but 43% of this older cohort is still not comfortable going out until infection rates are generally low.

BIPOC respondents have also been vaccinated at a slightly lower rate than White respondents and remain more hesitant about returning to live events post-vaccination. 43% of vaccinated Black or African American respondents are ready to go out now, versus 50% of White respondents.

Ready to go out now (by race/ethnicity)



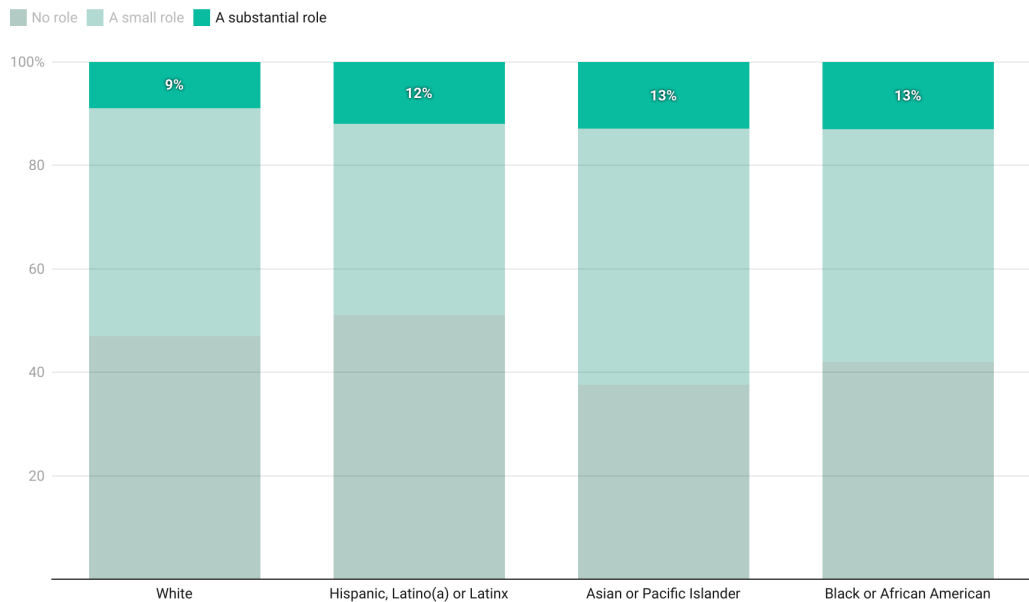
n=9,534 (April 28)

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

Minimal demand for digital content

Role of online programs in cultural life after full reopening (by race/ethnicity)



n=9,534 (April 28)

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

Fig 7: “Once facilities reopen and its possible to attend in person programs as often as you’d like, what role will online programs play in your cultural life?” (by race/ethnicity)

Only 9% of respondents still indicate that digital will play a *substantial* role in their cultural life once venues are open. Older populations and BIPOC respondents seem slightly more inclined to view digital as a significant part of their cultural life once live gatherings are available widely. 13% of Black or African Americans, 13% of Asian/Pacific Islanders, and 12% of Hispanic and/or Latinx respondents believe that their digital consumption will be *substantial*, versus only 9% of White respondents who indicate the same.²

² Due to low sample sizes for Middle Eastern and American Indian/Alaska Native respondents, statistics for these groups were withheld.



Fig 8: Future online behavior verbatims

While interest and engagement in digital content remains limited across the board, those for whom digital content will play a role once venues are fully open indicate the importance of digital access to music and dance concerts, theatrical productions and interactive, education content, lectures, post-performance discussions and artist talkbacks.