AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

PAC National Cohort

July 2020

Contents

About this study

This snapshot report updates key findings using the July deployments of the Audience Outlook Monitor 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. This report reflects data collected by the National PAC cohort.

Participating Organizations

Organization Name	City
Adrienne Arsht Center	Miami, FL
Aronoff Center	Cincinnati, OH
AT&T Performing Arts Center	Dallas, TX
Bass Performance Hall	Fort Worth, TX
Blumenthal Arts	Charlotte, NC
Broward Center for the Performing Arts	Fort Lauderdale, FL
Bushnell Center for the Performing Arts	Hartford, CT
Columbus Association for the Performing Arts	Columbus, OH
Dayton Live	Dayton, OH
Denver Center for the Performing Arts	Denver, CO
Dr. Phillips Center for the Performing Arts	Orlando, FL
Grand Theater	Wasau, WI
Hult Center for the Performing Arts	Eugene, OR
Kennedy Center	Washington, DC
Kentucky Performing Arts	Louisville, KY
Kimmel Center for the Performing Arts	Philadelphia, PA
Kravis Center	West Palm Beach, FL
Lesher Center for the Arts	Walnut Creek, CA
Lincoln Center for the Performing Arts	New York, NY
Marcus Performing Arts Center	Milwaukee, WI
The Music Center	Los Angeles, CA
New York City Center	New York, NY
New Jersey Performing Arts Center	Newark, NJ
Ordway Center for the Performing Arts	Saint Paul, MN
Orpheum Theater/Holland Center	Omaha, NE
Pittsburgh Cultural Trust	Pittsburgh, PA
Playhouse Square	Cleveland, OH
Seattle Theatre Group	Seattle, WA
Segerstrom Center for the Arts	Costa Mesa, CA
Smith Center	Las Vegas, NV
Tennessee Performing Arts Center	Nashville, TN
Tobin Center for the Performing Arts	San Antonio, TX
Walton Arts Center	Fayetteville, AR

Overview of results

85%

Are at least '*somewhat eager*' to return to their Centers (+1pt)

85%

Plan to attend as much or more than they did before the pandemic (-2pts)

17%

Will resume attendance as soon as restrictions are lifted (-3pts)

75%

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

41%

Would be '*encouraged*' to attend by the presence of venue safety measures (+3pts)

56%

Will definitely attend if required to wear a mask and adhere to social distancing (-2pts)

Survey Responses

33

Participating Performing Arts Centers

7,229

Total responses

Audience sentiment toward attending cultural activities

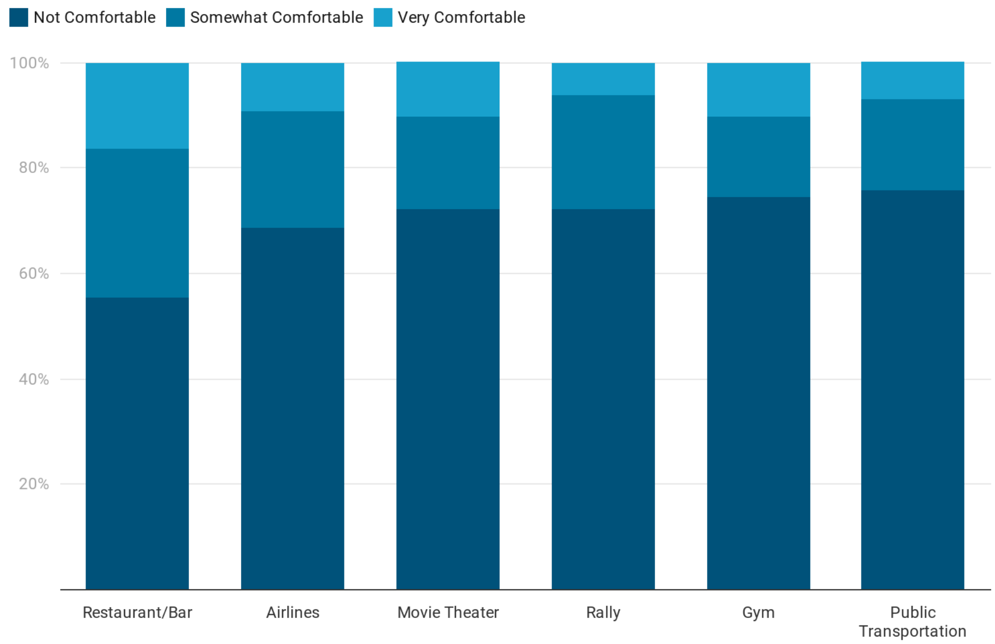
89% of respondents still plan to resume attending arts and cultural events, but only under a variety of conditions related to the status of COVID-19.

Though audiences are still hesitant to return to normal levels of cultural and social activity, overall in-person activity has increased since the June report; two in five respondents engaged in in-person activities in July, including a notable increase in activity at local restaurants.

Since the June report, confidence in attending arts and cultural events, given the broad availability of general testing and treatment for COVID-19, has decreased (-9% pts), while confidence in attending has increased assuming personal vaccination or immunity (+8% pts). As more activities become available to the public, planned attendance has seen slight increases (particularly at museums and fairs/festivals), but overall, respondents are conditionally less ready to attend relative to the June report findings.

12% of respondents made firm plans to visit cultural venues (museums, galleries, theaters, fairs/festivals, lectures or public parks) in the two weeks prior completing the survey.

Level of comfort with public activities



n=7,229

Chart: AMS Analytics • Source: Audience Outlook Monitor, Wave 2 • Created with Datawrapper

Fig 1: How comfortable would you feel doing theses public activities today, given no restrictions?

Audience propensity to return to public activities is dependent upon the type and size of spaces. Respondents seem most willing to return to restaurants (44%) while movie theaters (27%), gyms (25%), and other indoor activities remain less popular.

Respondents' confidence in public officials and individual arts organizations to make the right call regarding the virus has waned slightly; only 34% of respondents now trust public officials to determine when health risks are low enough for their constituents to go out.

What venues make audiences feel most comfortable

Respondent comfort with theatres remains inversely correlated to venue capacity.

As venue capacity increases, the level of comfort with venues drops. In comparison to June report results, respondents feel less comfortable in venues overall; the volume of respondents who are comfortable in venues of any size is down an average of 6 percentage points across all venue sizes.

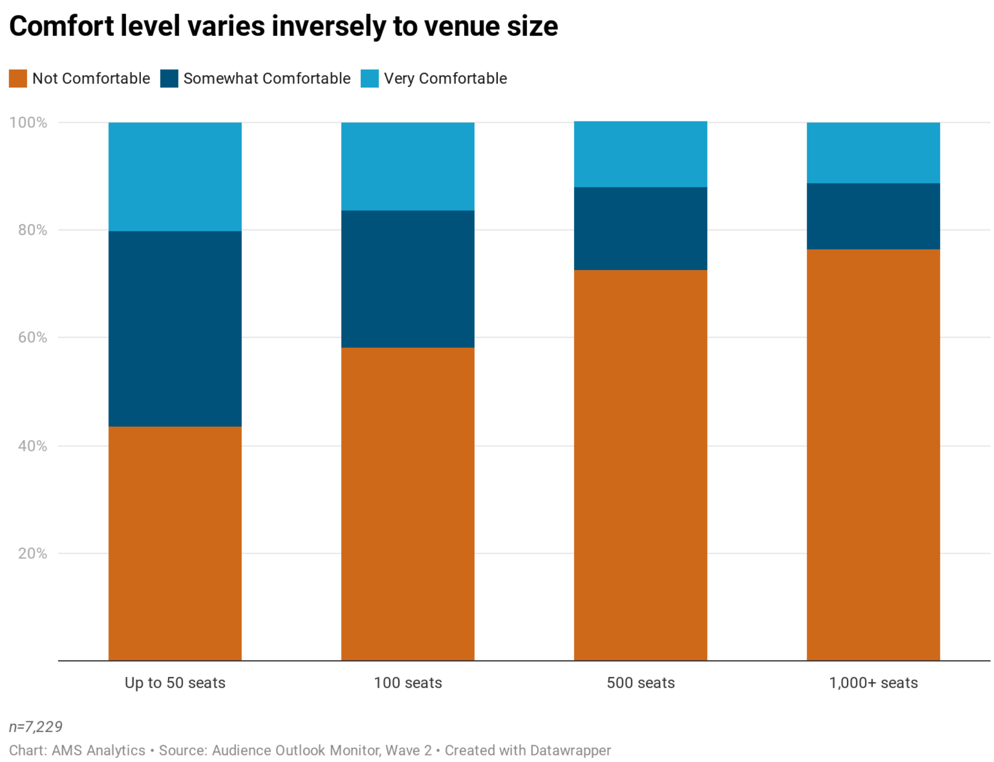


Fig 2: Comfort level by venue capacity

More than half of respondents would be at least *somewhat comfortable* currently at outdoor concerts, in community art spaces, or in museums and galleries, if they were open and following social distancing guidelines.

Spaces where social distance can more easily be maintained continue to correlate with increased levels of comfort in attending, but overall comfort levels have dropped since the June report. About half of respondents express that they would be comfortable at an outdoor event or in a smaller community art space, and about seven in ten would now be comfortable in a museum or gallery.

Purchase of tickets for events in future dates as distant as March 2021 has decreased, with only one in twenty respondents having purchased tickets during the month of July for future events.

How audiences are supporting Centers during COVID-19

75% of respondents anticipate their overall spending for subscriptions or tickets will be the same as before the health crisis began.

We observed an uptick in the number of respondents who anticipate increased spending once they feel comfortable returning (up to 11% from 8% as of the June report). Overall, 86% anticipate spending the same or more than pre-COVID spending levels. Similarly, a greater percentage of current donors anticipate giving at greater levels: one in five expect to give more (up from 15% in the June report).

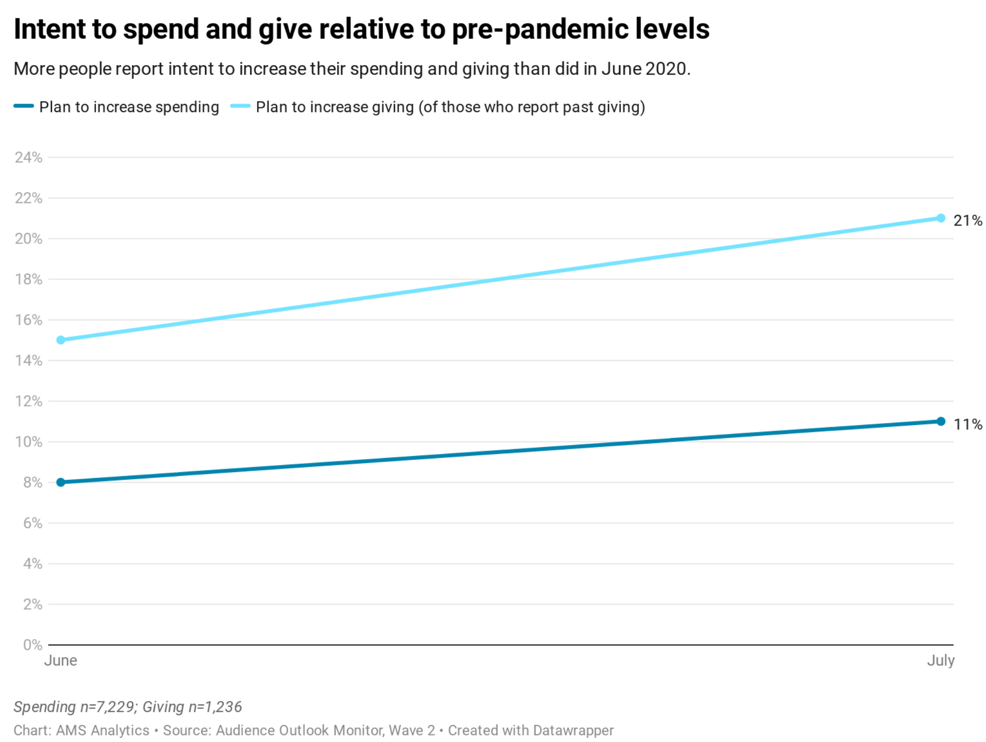


Fig 3: Change in percentage of respondents planning to increase spending and giving from June report to July report

61% are at least somewhat likely to be willing to pay higher ticket prices temporarily.

Willingness to temporarily pay higher prices has essentially held steady as compared to the June report (62%). A greater percentage of respondents are likely to buy tickets to live streamed programs than they were as of the June report (June report: 58%; July: 60%), but a slightly lower percentage report interest in purchasing vouchers or gift certificates (June report: 59%; July: 57%).

85% of respondents are at least *somewhat eager* to return to their Centers; 43% are *very eager* to return.

How Centers are communicating with their patrons, and what Centers can do to support audience needs

78% of respondents believe their center has done a *good or excellent job* of staying in touch with patrons.

Patrons remain satisfied with the quality and quantity of communication overall. Consistent with previous figures, 85% of respondents indicate that the frequency of communication from their Center has been about right, as of July.

83% of respondents *agree or strongly agree* that they will be most interested in the same kinds of performances as they were before COVID-19.

July results suggest that interest in live-streamed performance continues to increase.

Only 14% of respondents have consumed digital broadcasts or content offered or recommended by their Center since the health crisis began.

Engagement with Center-driven digital content remains low, with less than one in ten watching digital broadcasts or other content once, and slightly more than one in twenty engaging multiple times. 18% of respondents are still unaware of digital content being offered by their Center.

The impact of health practices being employed to protect patrons

Nearly nine in ten respondents would be at least somewhat encouraged to attend by the disinfecting of public areas daily and provision of hand sanitizer.

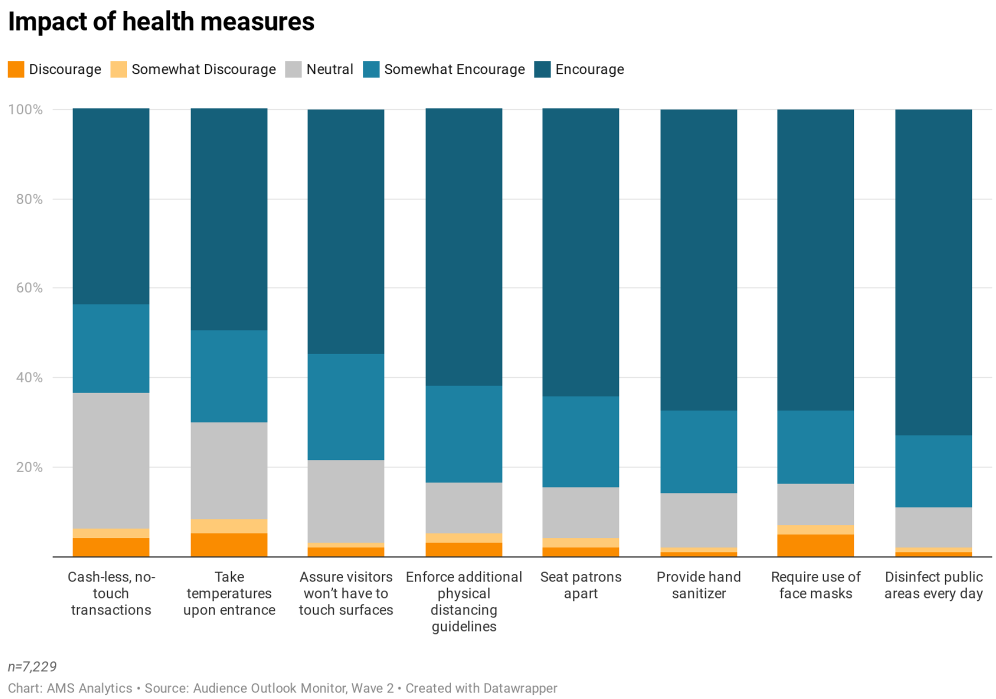


Fig 4: Impact of health risk reduction measures

Patrons are slightly less encouraged by regular disinfecting, provision of hand sanitizer, and cashless options compared to June report results, presumably as these practices and provisions are now simply expected. Meanwhile, the required use of face masks and temperature checks are encouraging to a greater portion of respondents, relative to the June report.

56% **of respondents will attend if required to wear a mask and adhere to social distancing, while 32% *may attend.***

Verbatim comments around actions to reduce health risks vary, but many respondents note that their concerns are the result of unpredictable behavior of other patrons, and the ability of venues to enforce their health safety regulations, particularly around mask requirements.