AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

All AOM Cohorts

November 2020

Table of Contents

About this study

This snapshot report updates key findings using the October and November 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, comfort in venues, anticipated future support for centers, centers' communication with patrons, and the impact of health and safety measures. This report reflects data collected by all participants in the AOM study, as indicated in the following pages.

Participating Organizations

Organization Name	City
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
Cal Performances	Berkeley, CA
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
Hancher Auditorium	Iowa City, IA
Hult Center for the Performing Arts	Eugene, OR
Hylton Performing Arts Center	Manassas, VA
Jazz at Lincoln Center	New York, NY
Kentucky Performing Arts	Louisville, KY
Kimmel Center for the Performing Arts	Philadelphia, PA
Lesher Center for the Arts	Walnut Creek, CA
Lincoln Center for the Performing Arts	New York, NY
Marcus Performing Arts Center	Milwaukee, WI
Meany Center for the Performing Arts	Seattle, WA
Midland Center for the Arts	Midland, MI
New Jersey Performing Arts Center	Newark, NJ
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
Seattle Theatre Group	Seattle, WA
Segerstrom Center for the Arts	Costa Mesa, CA
Signature Theatre	New York City, NY
Strathmore	North Bethesda, MD
Studio 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 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
University of Florida Performing Arts	Gainesville, FL
Walton Arts Center	Fayetteville, AR
Wolf Trap	Vienna, VA

Overview of results

94%

Are at least '*somewhat eager*' to return to their Centers

92%

Plan to attend as much or more than they did before the pandemic

19%

Will resume attendance as soon as restrictions are lifted

77%

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

87%

Would be '*encouraged*' to attend by the presence of venue safety measures

58%

Will definitely attend if required to wear a mask and adhere to social distancing

Survey Responses

56

Participating Performing Arts Centers and Producers

9,077

Total responses (November 11)

Executive Summary

In summary, late October and November results demonstrate that demand for live programming remains strong, and patrons continue to be supportive of their organizations' return to operation. That said, increasing virus incidence rates around the country have delayed in-person attendance throughout the winter season.

Pent-up demand remains strong

More than 90% anticipate attending the same amount or more in the future, compared to their pre-pandemic rate.

Despite increasing infection rates, demand for programming remains strong. Anticipated future attendance has not wavered since July, with over nine in ten respondents anticipating similar or more attendance than before the pandemic. Over half of respondents continue to indicate that they are very eager to return to their organizations. Live streaming engagement has also held steady, with three in four respondents indicating that they have viewed digital performances.

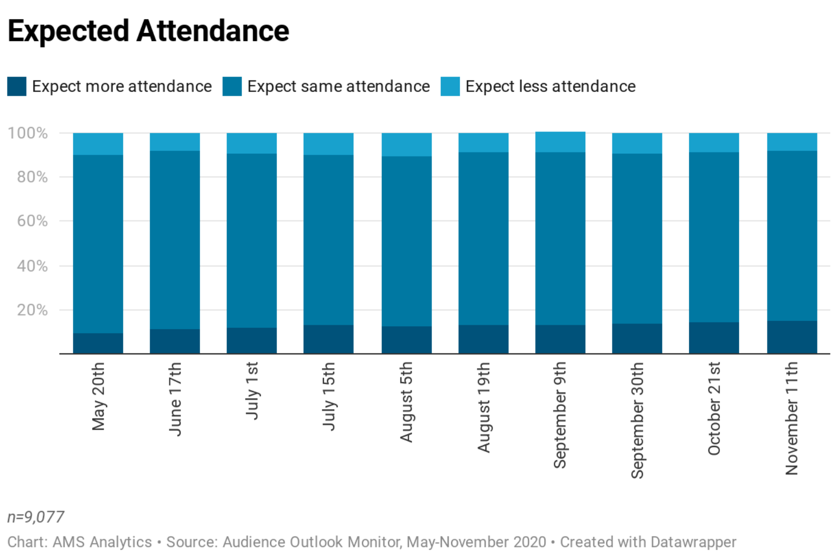

Fig 1: "How will your attendance at arts and cultural activities be affected by the pandemic in the long term, given your personal circumstances?"

November results reveal an intriguing trend in virtual attendance. Although respondents indicate steady interest in outdoor space for music performances, comfort in indoor spaces inversely corresponds with an increase in interest in live-streamed digital programming.

Changing comfort levels

Less than two in ten are comfortable going out once restrictions are lifted.

As the pandemic intensifies, respondent comfort levels have seen slight declines. Whereas results leading into September were trending upwards, now a lower 17% of respondents indicate being comfortable going out once restrictions are lifted, as of November.

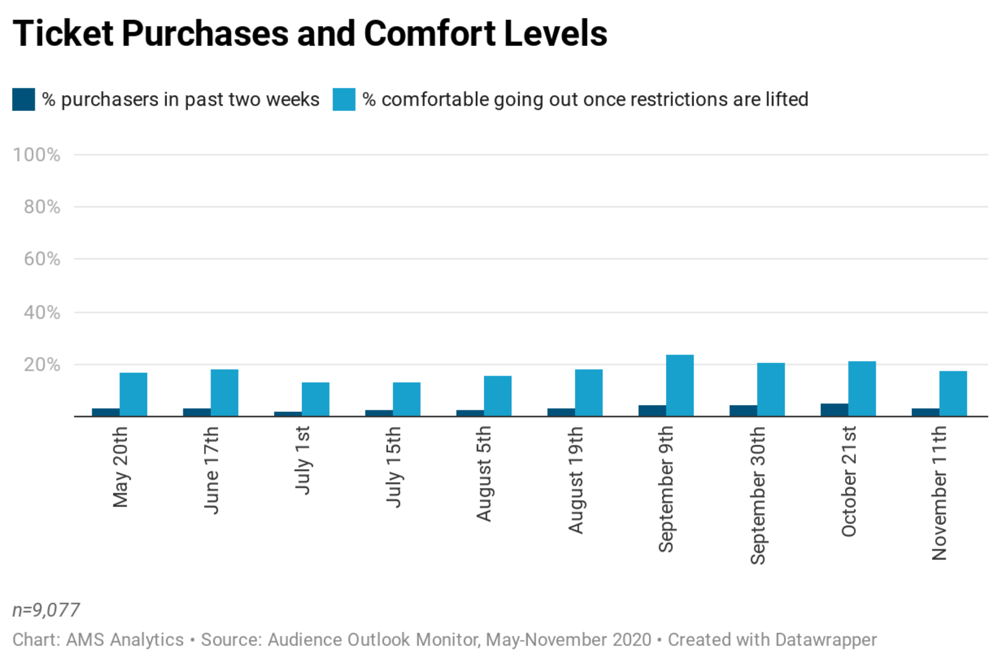

Fig 2: % comfortable going out once restrictions are lifted; % purchasers in the past two weeks

The study tracks willingness to return on a scale of conditions from *as soon as it is legally allowed* to *under no conditions in the foreseeable future*. Until now, results showed a steadily climbing number of respondents answering that they would be comfortable returning as soon as it becomes legally allowable to do so. However, upticks in incident rates have pushed that trend downward 20 percent in November. As of November, nearly 40% of respondents report they are now waiting for vaccination or immunity before they will return—versus 30% in October.

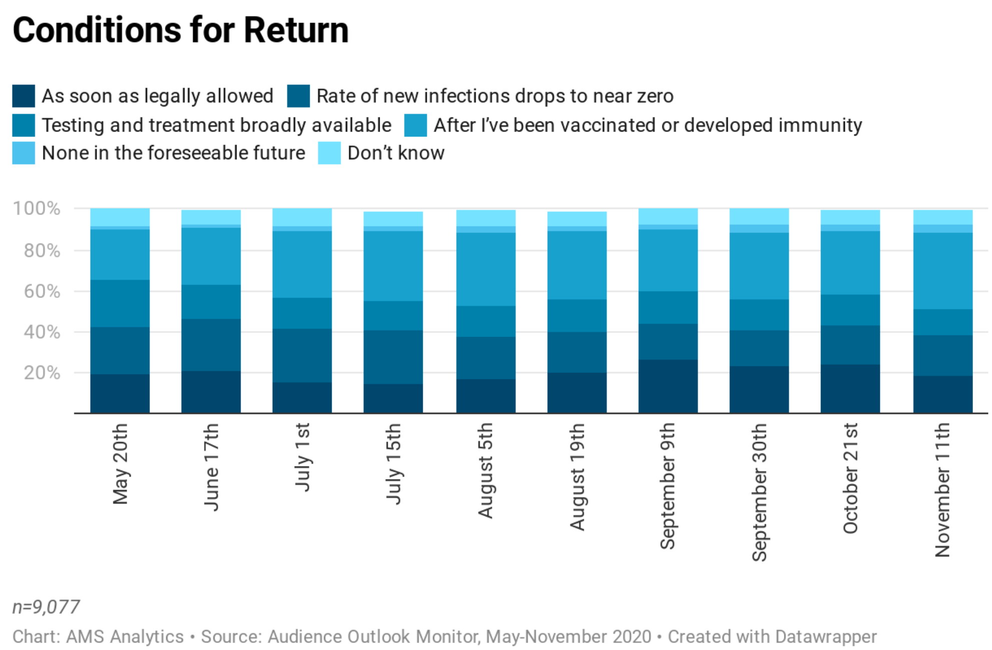

Fig 3: "Under what conditions will you resume attending cultural events?"

Older respondents (above age 65) remain the most uncomfortable with the notion of return: only 10% of respondents over 65 would be comfortable going out as soon as legally allowed, and more than half of respondents over 65 would only attend after vaccination or immunity.

Regional distinctions

In this section, we note differences in demand for programming as well as risk tolerance as they fluctuate based on geographic region.

Demand

More than 60% of respondents from the northeast and western US regions say they are '*very eager*' to return to their organizations, while less in the south and Midwest say they are '*very eager*'.

A higher percentage of respondents from the northeast report they have viewed livestreamed performances and anticipate greater future in-person attendance than in any other region surveyed. Since the study started tracking data on livestreaming, more than 80% of northeasterners surveyed have viewed such performances, whereas viewership in other regions is regularly below 75%. Throughout the autumn season, northeasterners have also projected more in-person attendance in the future than any other region, with 18% of respondents expecting to attend more than before the pandemic.

Comfort levels

Respondents in southern states report the lowest levels of trust in public officials, while respondents in the northeast consistently report the highest. As of November, 20% of respondents in southern states indicate that they are comfortable going out once restrictions are lifted, whereas only 14% of northeastern respondents will feel comfortable doing so. As for confidence in return, personal vaccination is the single most important condition for resuming attendance across all regions, but most prevalently in the northeast where 44% of respondents say they will only resume attendance once they are vaccinated. Audiences in the Midwest report a lower threshold with 36% of respondents from that region reporting they plan to wait until receiving the vaccine before they will return to the theater.