



AUDIENCE OUTLOOK MONITOR

Snapshot Report: Update

All AOM Cohorts

October 2020



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About this study

This snapshot report updates key findings using the September and October 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, including a specific look at 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
Leshner 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
Seegerstrom 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	Wausau, 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

89%

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

90%

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

23%

Will resume attendance
as soon as restrictions are lifted

74%

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

88%

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

60%

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

Survey Responses

58

Participating
Performing Arts Centers and
Producers

9,177

Total responses
(September 30)

Changes in demand for live programming

Two in ten made firm plans to attend cultural events in September and October.

Confidence in returning to cultural and live events continues to trend upward since the summer months. Half of respondents report having eaten at a local restaurant in September and October, and 23% report being comfortable going out once restrictions are lifted—the most since the study began. Planned attendance has increased, driven by visits to museums and galleries, fairs and festivals, and live performances.

Plans to Attend

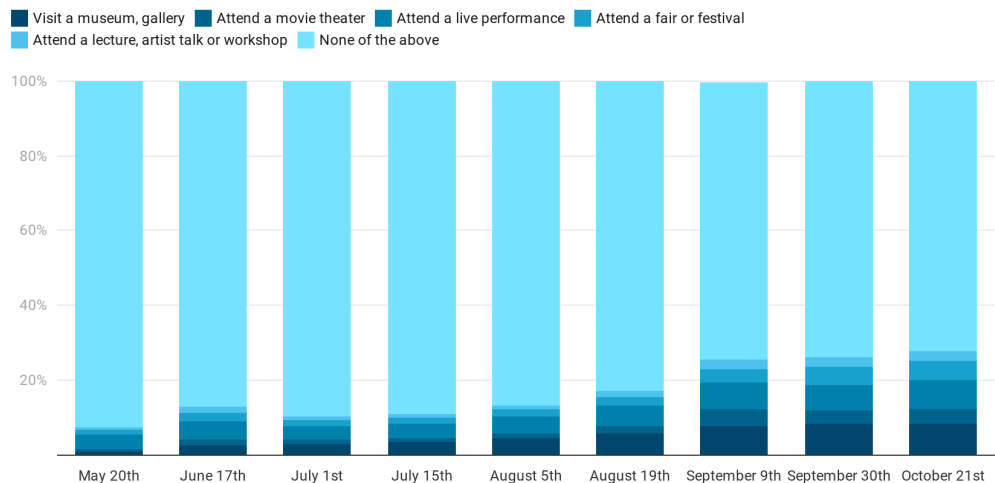


Chart: AMS Analytics • Source: Audience Outlook Monitor, May-October 2020 • Created with Datawrapper

Fig 1: “In the past two weeks, did you make firm plans to do any of the following activities outside the home, whether free or ticketed?”

Younger respondents are planning to attend live events: 25% of those under age 35 made plans to attend events in September, while only 15% of respondents over age 65 did the same.

Increases in planned attendance also correspond with a strong *bond* to one’s organization. One in four respondents who claim to have a strong

A NOTE ABOUT 'BOND'

The Audience Outlook Monitor measures audience affinity in several ways. One key metric for understanding loyalty to a particular organization is represented by “bond.” Respondents are asked to rate on a 5-point scale their “bond or feeling of affiliation” with the organization participating in the study. This measure is then used in analysis to cross-tabulate results.

bond with their organization made plans to attend in September and/or October, up from about 15% in August.

Notably, the northeast region has seen significant growth in planned attendance at galleries and museums between August and October, while other regions including the

Midwest and South have grown attendance at live performances and festivals, presumably due to lifted restrictions and increased offerings.

Nearly one in four will resume attending arts and cultural events as soon as legally allowed.

Respondents who tell us they plan to resume attending arts and cultural events have increased in frequency since the month of August, leveling at about 25%. In August, no more than one in five would return as soon as legal restrictions on gathering were lifted. Despite new confidence, most are still waiting for epidemiological conditions to change before resuming attendance.

Conditions for return

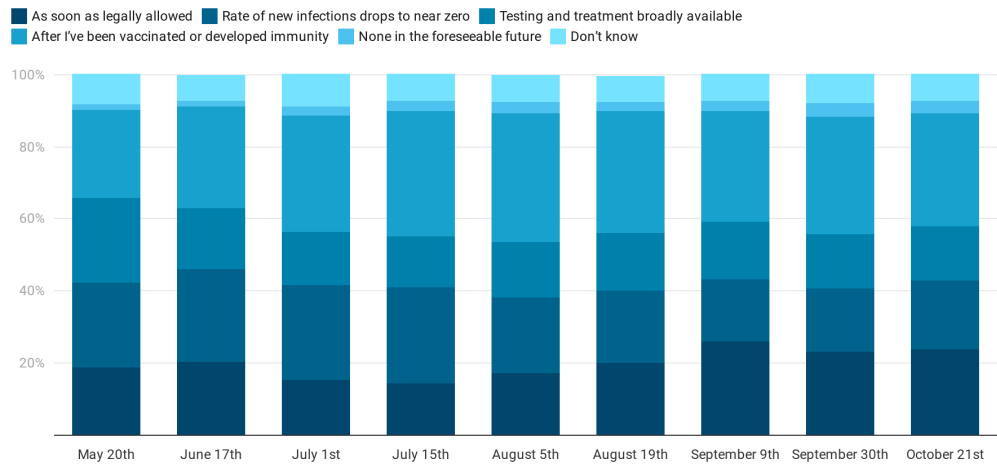


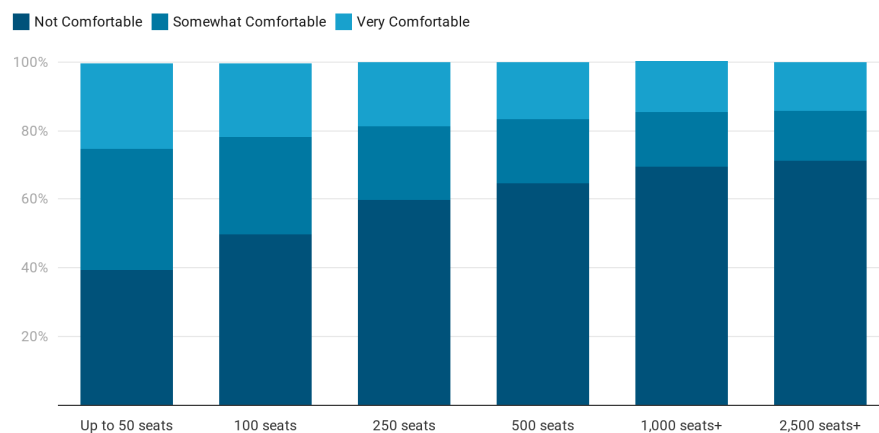
Chart: AMS Analytics • Source: Audience Outlook Monitor, May-October 2020 • Created with Datawrapper

Fig 2: “Under what conditions will you resume attending arts and cultural events?”

What venues make audiences feel most comfortable

Respondent comfort with theaters remains inversely correlates to venue capacity.

Level of comfort by venue capacity



n=6,275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 3: “Under what conditions will you resume attending arts and cultural events?” (October 21)

Relative levels of comfort at different venue capacities have stayed consistent since August. About six in ten respondents have expressed at least some level of comfort attending venues with up to 50 seats, while comfort levels remain much lower in larger venues.

Those who do not have a serious health vulnerability in their household are consistently more comfortable in any setting, regardless of space type or capacity. In October, 35% of respondents with no health vulnerability at home said they would be *very comfortable* in a venue of up to 50 seats, while only 15% of those who do have a serious vulnerability at home say they would be *very comfortable* in a venue of the same capacity. Patrons also indicate that they remain least comfortable in flexible-seat venues.

Nearly eight in ten would be at least *somewhat comfortable* walking around a museum or gallery currently.

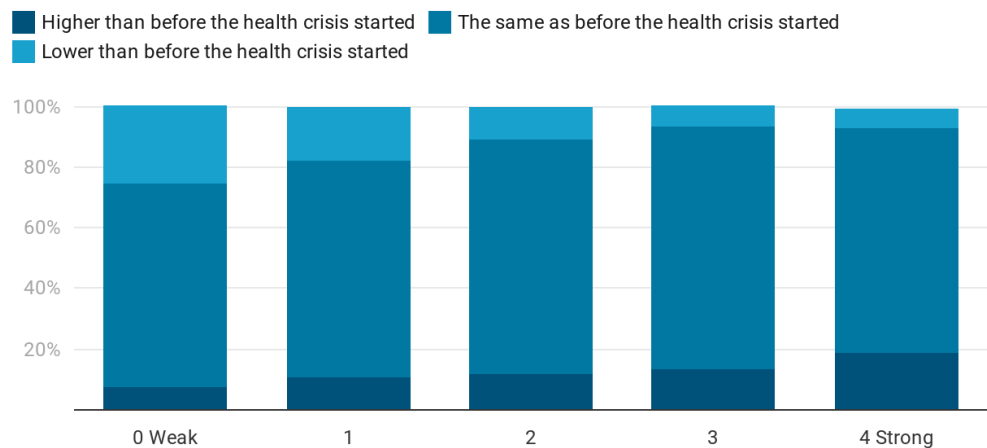
By far, respondents are more comfortable with outdoor venues; they indicate that botanical gardens and zoos offer the most comfortable environments, presumably due to natural social distancing and primarily outdoor environments. That said, comfort with attending indoor cultural events has increased slightly across the board, with respondents indicating higher levels of comfort primarily in community art spaces and museums/galleries.

How audiences supporting Centers during COVID-19

Nearly nine in ten anticipate at least the same or more overall spending upon return.

Overall, these anticipated spending levels represent an encouraging projection for attendance and paid engagement. While over nine in ten who report a strong *bond* with their organization plan to spend the same or more on subscriptions and tickets, less than four in five of those with a weak *bond* will spend the same or more.

Anticipated overall spending upon return (by bond with organization)



n=6,275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

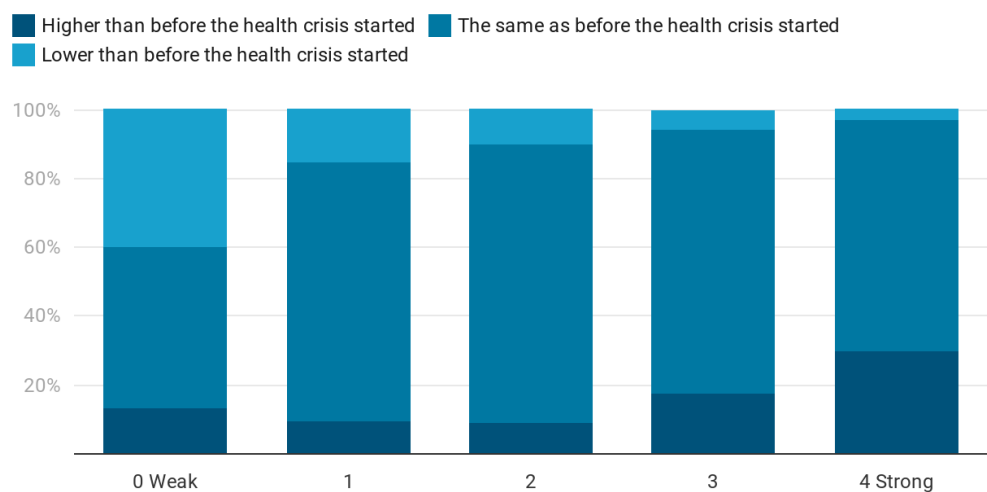
Fig 4: "When you feel comfortable going out again, do you anticipate your overall spending on subscriptions or tickets for our performances will be..." (October 21)

Those who have experienced financial hardship due to the pandemic indicated slightly lowered levels of future spending and giving, though not as extreme as might be expected considering loss of household income.

Eight in ten existing donors continue to project similar or higher levels of giving to their organizations.

While most existing donors anticipate maintaining their level of giving, three in ten with a strong *bond* to the organization report that they will *increase* giving beyond pre-pandemic levels. As would be expected, a much lower number (only one tenth) of donors who report a low level of *bond* to the organization plan to increase their giving.

Anticipated giving upon return (by bond with organization)



n=6,275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 5: “When arts and cultural programming in your community resumes and you feel comfortable going out again, do you anticipate your donations to [Organization] will be... (October 21)

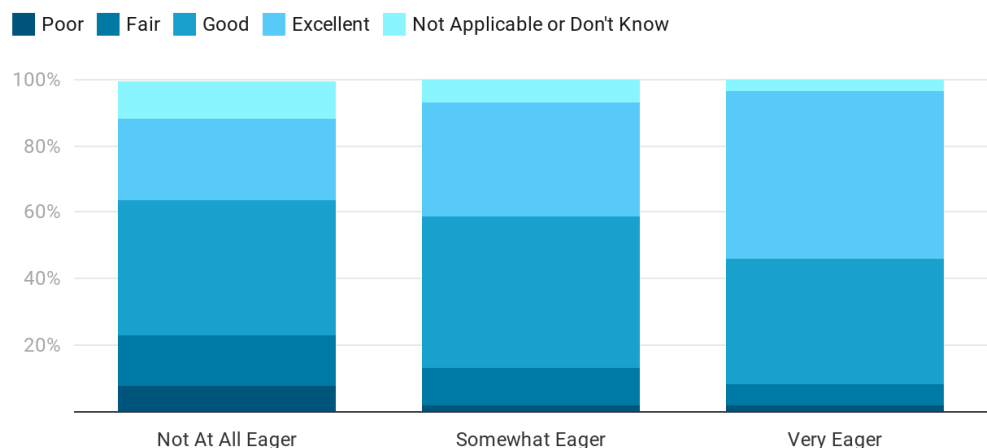
How centers are communicating with their patrons

Over eight in ten believe their center has done a *good or excellent job* staying in touch with patrons.

Satisfaction with organization communications has also held steady since August. Respondents also feel that the frequency of communication is 'about right'.

Nearly nine in ten who are eager to return believe that their organization has done a *good or excellent job* of staying in touch, while only six in ten of those who are not at all eager to return say the same.

Quality of Organization Communications by Eagerness to Return



n=6,275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 5: "When arts and cultural programming in your community resumes and you feel comfortable going out again, do you anticipate your donations to [Organization] will be..." (October 21)

Organizational commitment similarly correlates with the perception of quality of communication; strongly committed respondents more commonly consider organizational communications *good or excellent*.

The impact of health practices being employed to protect patrons

Aggregate numbers in every category of health and safety have remained steady since August.

Impact on attendance of required face masks

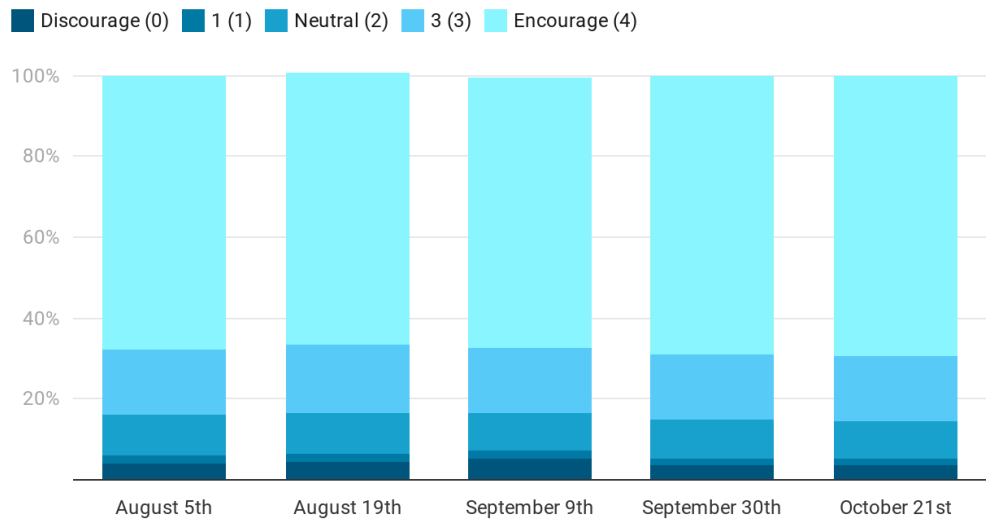


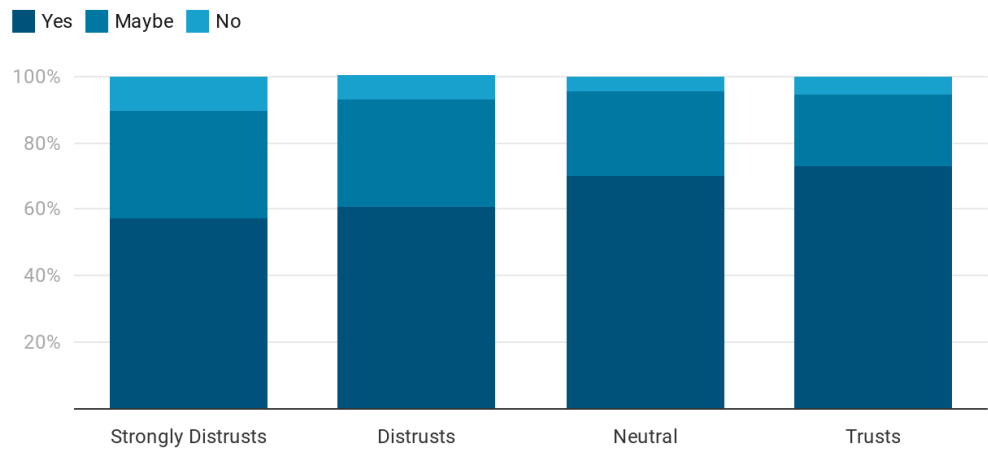
Chart: AMS Analytics • Source: Audience Outlook Monitor, August-October 2020 • Created with Datawrapper

Fig 6: Impact of required use of face masks

Consistent responses related to the impact of health and safety measures over time suggests that audiences have come to expect basic cleaning and sanitization to fight the spread of infection, and many venues are meeting these standards.

The data show a different distribution when filtered by respondents' level of trust in public officials. For example, three in four of those who trust public officials to make decisions regarding safety feel comfortable attending performances that require masks and distancing. Conversely, for those audience members who distrust public officials, only slightly more than half indicate that they will attend performances with masks and distancing.

Will you attend given mask requirement and social distancing guidelines (by trust in public officials)?



n=6,275

Chart: AMS Analytics • Source: Audience Outlook Monitor, October 2020 • Created with Datawrapper

Fig 7: “If you are required to wear a mask and adhere to distancing guidelines and other health safety precautions, will you still attend our mainstage performances?” (October 21)