AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

Published April 2022

This report reflects data collected nationwide in March 2022 as part of the Audience Outlook Monitor study of arts audiences, in collaboration with WolfBrown

Survey Responses

37

Participating Performing Arts Centers and Producers

8,155

Total responses (March 16)

Current attendance and purchases have exceeded any previous levels during COVID

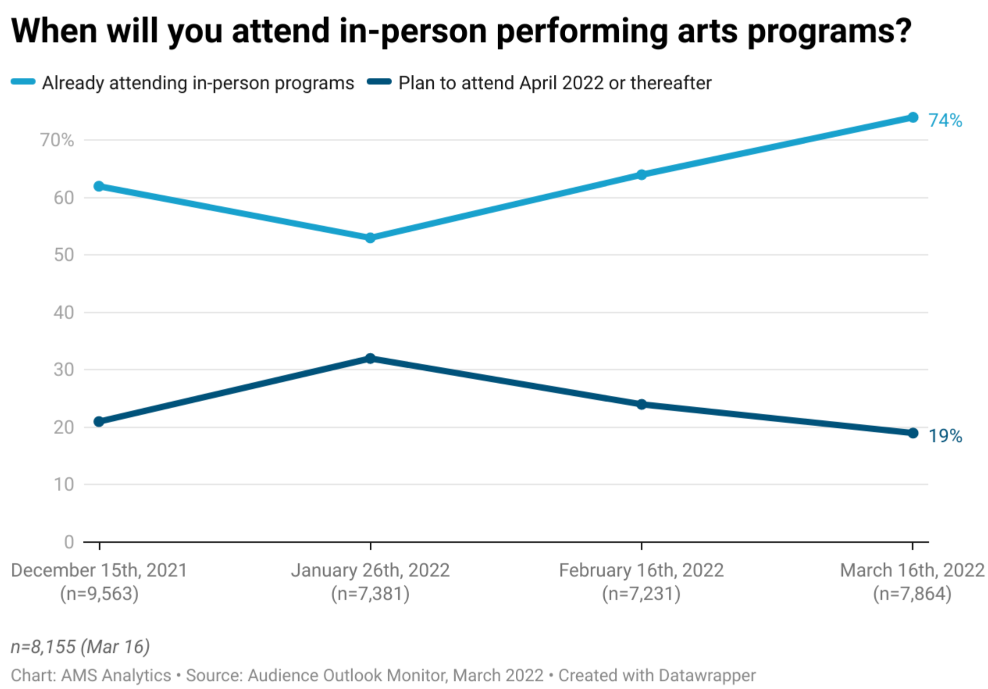

Fig 1: "When do you think you'll resume attending live performing arts programs?"

March saw **continuing growth in current attendees to 74%**, up from 53% in January and 64% in February. Only **26% are still deferring their attendance at live performing arts events**, including 19% who plan to wait until April 2022 or later to attend. While the oldest patrons remain most cautious of any age cohort, 68% over age 65 are currently attending.

Steady improvements in comfort levels have been observed with both indoor and outdoor venues. As of March, **69% say they would feel 'very comfortable' at an outdoor festival or concert**, and **44% say the same of a large theatre or concert hall.**

While 40% expect masks and proof of vaccination or booster in order to attend indoors as of March (a continuing drop from 52% in February), another **40% will now attend indoors under any circumstances.** This represents the lowest health and safety protocol expectations for attendance since the study began tracking these expectations in September 2021. Those who expect mask *and* proof of vaccination include 51% over the age of 65, but only 36% (or less) of younger attendees. They also consist of 54% in the Northeast region alone, versus 41% or less across other regions.

Half of patrons attended a live performance in mid-March, up from 43% in mid-February. This represents the highest rates of current attendance measured in our study to date.

52% of respondents purchased tickets or subscriptions in mid-March, representing continued growth from 46% in February; this level of purchase activity also exceeds any other point in the study. In March, 55% with a self-reported 'strong' organizational bond made purchases, versus 46% with a weak bond. Also, 60% of respondents under age 54 made purchases, versus 46% of those over age 65.

Among those who have not returned to their organization's in-person programming, concerns about COVID are dropping, while program interest and cost are proving to be increasingly important barriers to attendance:

> **35% report concerns about getting or transmitting COVID-19 in March**, compared to 44% in February.
>
> **49% have not yet found a program they want to attend.** This is up from only 43% in February and is pronounced among those with a weaker bond: while about 40% with a 'strong' bond report this challenge, more than 50% with a weaker bond say the same.
>
> **20% report concerns about the cost of attending** and personal budget limitations.

Steady and effective communication continues, as **57% say their organization has done an 'excellent' job of staying in touch and communicating.** An additional 31% say communication is 'good'.

While the majority still support vaccinated-only admittance, concerns are dropping and comfort levels are rising

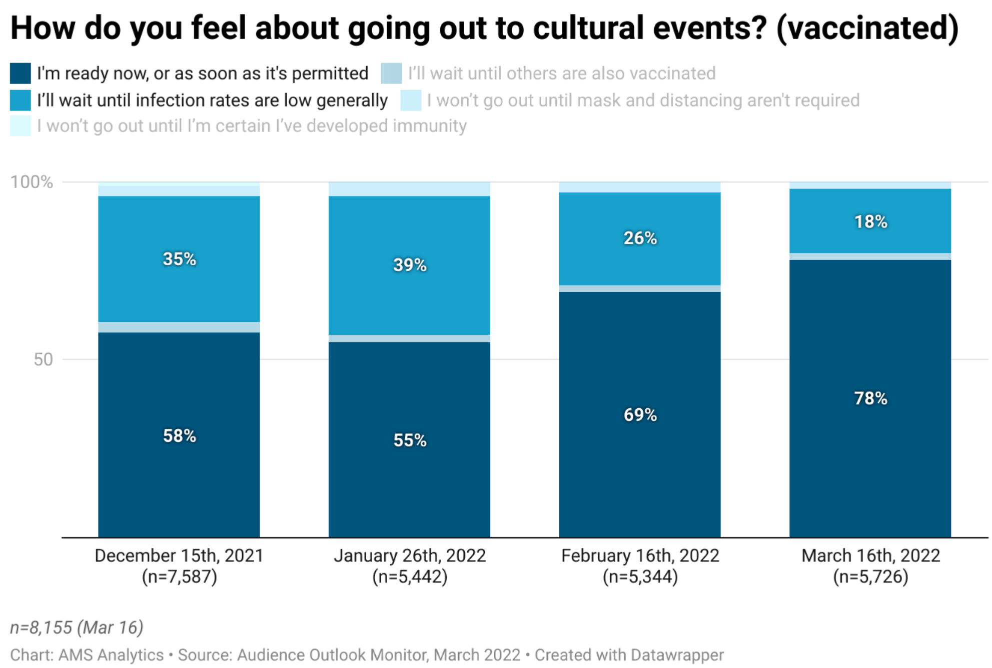

Fig 2: "Which statement best reflects how you feel about going out to cultural events?"

78% are ready to attend now (including 75% over age 65), representing the greatest patron confidence since the pandemic. Only 18% now plan to wait for infection rates to drop before attending.

Booster rates have leveled off at a combined 85% of arts audiences who are now both vaccinated and boosted, and an additional 10% who are vaccinated but not boosted. The highest rates of vaccination + booster are found among Northeast audiences (93%).

All concerns continue to drop across the board; most notably, only **11% remain 'very concerned' about the safety of gathering in large numbers as of March,** compared to 19% in January.

Support for vaccinated-only admittance has seen another appreciable drop, but majority still report that vaccine policies positively impact their decision to attend.

61% of respondents are encouraged to attend by vaccinated only policies, a figure which includes **13% who say they would only visit given this policy.** Despite reductions in vaccinated-only admittance, interest in the policies remains strongest in the Northeast region, where 21% say they would only visit given this policy. Meanwhile, 12% in the Midwest region and 15% in the Southern region say they would *not* visit venues which employ vaccinated only policies.

Policies providing options to mitigate the spread of COVID-19 continue to have a diminishing impact on the likelihood of purchase in March, but the option of booster-only admittance still motivates more than half. Compared to 59% in February, **53% still say that booster-only admittance policies would have an influence on their purchase** of individual tickets in the near future. The option to be re-seated in an emptier section at the last minute also motivates ticket purchases for over half of audiences.

Down significantly from 63% in February, **46% believe that mask mandates are necessary for theaters and concert halls in their communities right now**, whether with or without a proof of vaccination policy.

Respondents who feel mask mandates are necessary right now, by region:

Northeast: **57%**
West: **45%**
South: **45%**
Midwest: **39%**

Overall, comfort levels have grown month over month with recent experiences; **64% of respondents who have attended report that they were 'very comfortable' with their experience.**