AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

Published July 2022

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

Survey Responses

26

Participating Performing Arts Centers and Producers

2,590

Total responses (July 20)

Comfort levels drop with a July spike in COVID cases, but current attendance and purchase rates remain steady; meanwhile, traditional attendance barriers persist

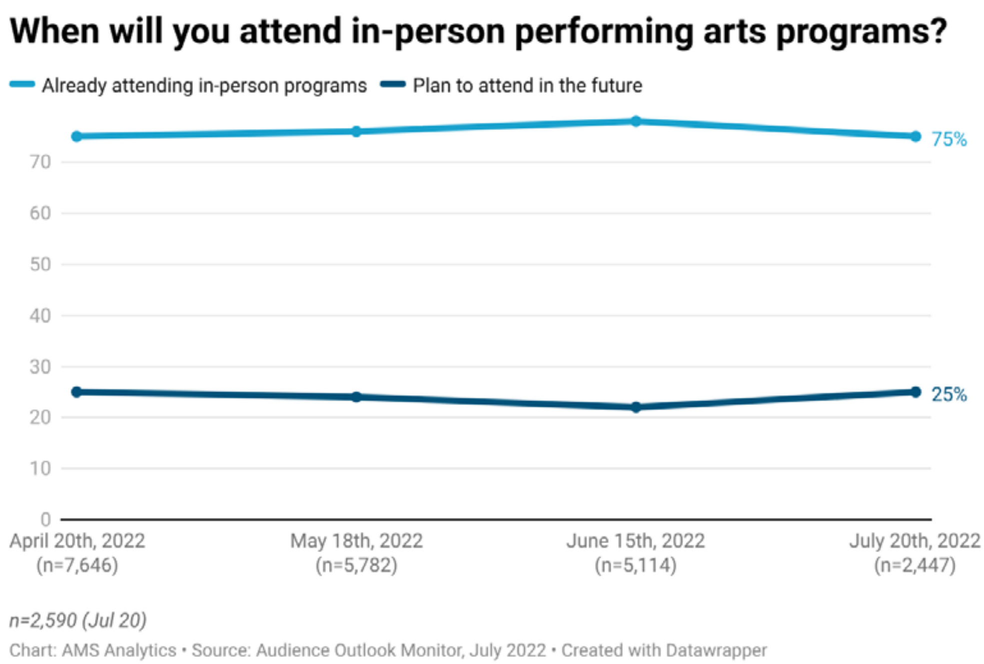

Fig 1: "When do you think you'll resume attending live performing arts programs?"

Sentiments about current attendance are holding steady: in July, **75% reported that they are currently attending,** compared to 78% in June. The gap between the oldest and youngest patrons has grown, and the oldest patrons remain the most cautious of any age cohort: compared to 87% of those under age 35, only 67% over age 65 are already attending in-person programs, while 23% of those over age 65 plan to wait until September or later to attend. Black and African American patrons continue to be notably more cautious than other races: 29% of Black patrons are waiting to attend, including 21% who will wait until September or later.

Comfort levels in both indoor and outdoor venues dropped in July. As of July, **60% say they would feel 'very comfortable' at an outdoor festival or concert**, and **34% say the same of a large theatre or concert hall;** this represents a 11% decrease in comfort outdoors, and a 17% decrease in comfort indoors, relative to June figures. Also, nearly half say they would 'somewhat' or 'strongly' prefer indoor venues in this moment, versus about one third who have no preference, and 16% who prefer indoor venues currently.

The percentage of patrons who say they will attend under any health safety circumstances has leveled off, as July saw a slight increase COVID cases nationwide. Compared to 42% in June, **37% in June say they will attend indoors under any circumstances.** Meanwhile, 59% still expect some safety regulation to be in place in order to attend indoors (at least masks). Under circumstances in which masks are optional, 41% of patrons say they will always wear a mask, and an additional 45% say they may or may not wear a mask, depending on the circumstances.

Despite attendance hesitancy, purchases remain steady, with **50% of respondents having purchased tickets or subscriptions in mid-July.** In July, 55% of audiences with a self-reported 'strong' organizational bond made purchases, versus 38% with a weak bond. Younger patrons tend to purchase *live music single tickets* and *live theatre or dance single tickets* more frequently, while older patrons more frequently purchase *subscriptions*. Also, a greater 63% of Hispanic / Latinx respondents made ticket or subscription purchase in July, compared to less than 53% of patrons of other races. Still more than half (52%) of all patrons who bought single tickets in July purchased them more than a month in advance of the event date.

Although COVID concerns have increased in July, and are at the front of mind for 42% of patrons who have yet to attend, ***program interest and difficulty making plans*** remain the other dominant barriers interfering with attendance:

> **51% have not yet found a program they want to attend.** This figure has grown since June, and is pronounced among those with a weaker bond: while 34% with a 'strong' bond report that they have not found a program of interest, 59% with a weak bond say the same.
>
> **42% report concerns about contracting or transmitting COVID-19 in July**, compared to 35% in June. 53% of patrons possessing a strong bond with their organization remain concerned about COVID, compared to only 33% with a weak bond. In the Midwest, a smaller 27% are concerned about COVID, compared to greater than 39% in other regions.

30% say making plans in advance is more difficult than it used to be, primarily due to the uncertainty of the pandemic. This barrier has increased since June (19%).

While attendance under any circumstances continues for 3 in 4 patrons, comfort levels have seen a slight drop and concerns about masking and vaccination enforcement endure

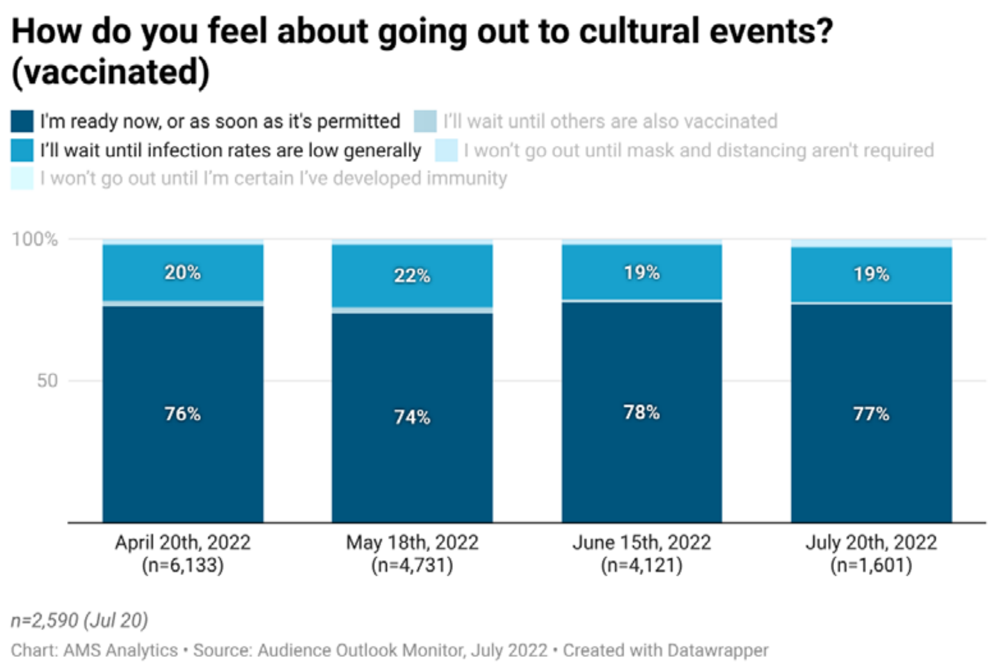

Fig 2: "Which statement best reflects how you feel about going out to cultural events?"

As of July, more than 3 in 4 vaccinated patrons remain ready to attend, while 1 in 5 are still waiting for infection rates to drop.

After several months of consistent comfort, comfort levels with current attendance dropped slightly in July: now, **54% of respondents who have attended report that they were 'very comfortable' with their in-person experience.**

For those who were less than 'comfortable' at a performance in July, the most dominant concerns continue to be centered around masking and distancing:

"The theater was full. Happy the people next to me were masked. Maybe allow an empty seat between parties."

"At the time masking was mandated but not enforced. Many people took off their masks when seated and no one asked them to put them back on."

"I think it's time to go back to wearing masks and checking for vaccinations."

Selectivity around in-person entertainment an important consideration for nearly half, while engagement with popular at-home entertainment options grows

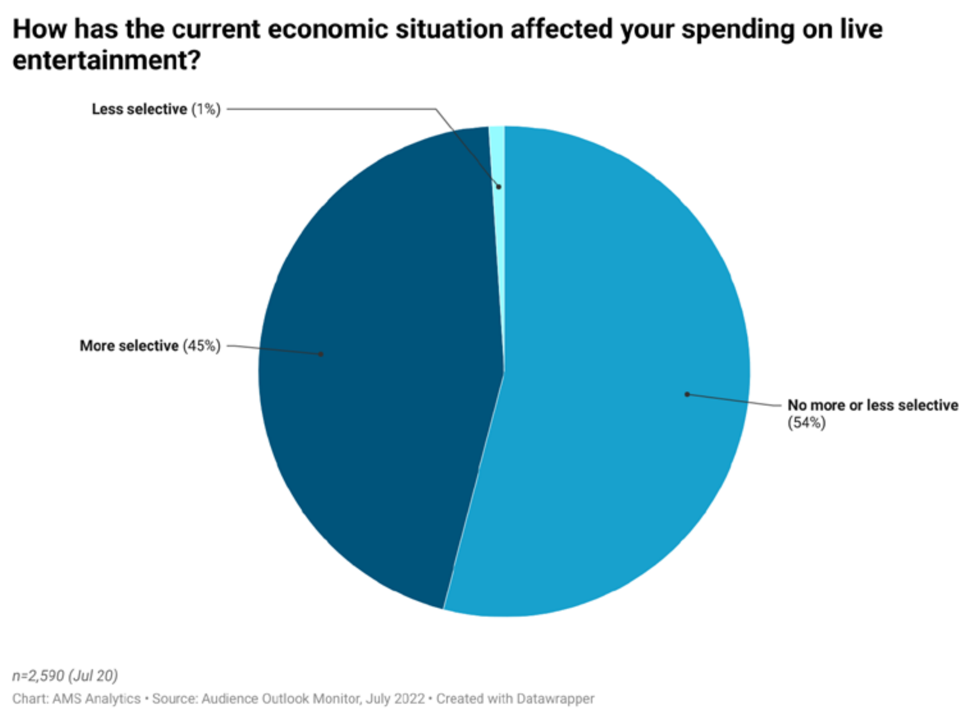

Fig 3: "How has the current economic situation affected your spending on live entertainment?"

When asked about engagement with new types of activities relative to pre-pandemic, more than **3 in 4 patrons (78%) report engaging in <u>no</u> new activities.** The remaining 22% of respondents who say they have tried new types of activities, have viewed streaming concerts and plays, attended outdoor events, and attended talks and lectures for the first time. Notably higher attendance is recorded at outdoor music and dance events, where 68% of patrons say that they have attended as often or more often, relative to pre-pandemic levels.

Additionally, the current economic situation is impacting selectivity for about half of audiences. **45% of patrons say that they are more selective about their spending on live entertainment** due to economic conditions, while the remaining 54% say they are no more or less selective.

The selectivity does not extend to options for mainstream entertainment at home: **79% of patrons say they watch programs on name-brand streaming services (Netflix, Hulu, Disney+, etc.) at least once per week** (31% do so on a daily basis), and 57% say they are watching film and television at home more frequently than before the pandemic. Meanwhile, only 15% subscribe to any arts and culture specific streaming services like *BroadwayHD, National Theatre at Home, Carnegie Hall +,* or *Ovation.*

Audience experience factors which mitigate COVID exposure tend to be more positive for patrons. Top audience experience factors with a positive bearing on attendance include **access to an excellent seats, the ability to select specific seats, and stricter health safety protocols.** 73% of audiences consider the 'opportunity to buy excellent seats' a positive factor, and 66% say that stricter health safety policies are a positive factor.

Meanwhile, **72% say that they would consider it a negative if a venue has 'no health safety protocols'**. 'Longer intermissions' and 'drinks allowed in the auditorium' are also negative factors for more than 40% of patrons.