



AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

Published January 2022

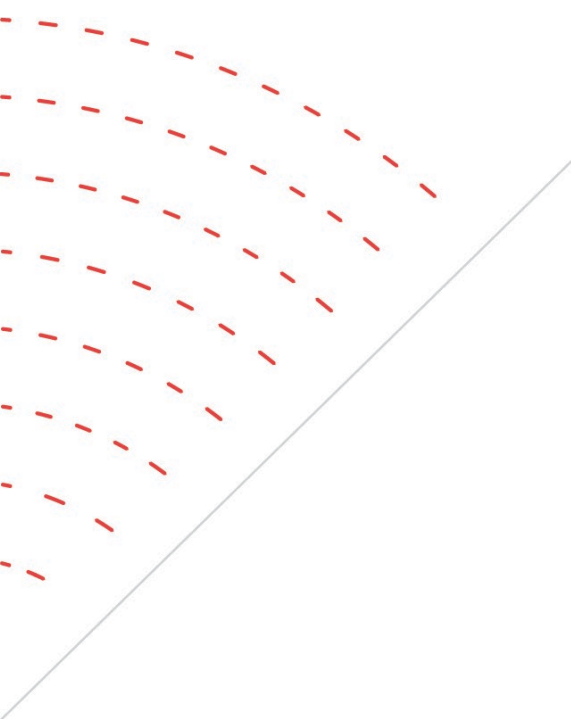


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About this study

This snapshot report updates key findings using the December 2021 deployment 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 and comfort in venues, perspectives on vaccination and resuming attendance, and experience with digital content. This report reflects data collected by all participants in the AOM study, as indicated in the following pages.

Participating Organizations

Organization Name	City
Arena Stage	Washington, DC
Aronoff Center for the Arts	Cincinnati, OH
AT&T Performing Arts Center	Dallas, TX
Bass Performance Hall	Fort Worth, TX
Blumenthal Arts	Charlotte, NC
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
Hult Center for the Performing Arts	Eugene, OR
Hylton Performing Arts Center	Manassas, VA
Jazz at Lincoln Center	New York, NY
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
Midland Center for the Arts	Midland, MI
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
Penn Live Arts	Philadelphia, PA
Pittsburgh Cultural Trust	Pittsburgh, PA
Playhouse Square	Cleveland, OH

Princeton University Concerts	Princeton, NJ
Round House Theatre	Bethesda, MD
Roundabout Theatre Company	New York, NY
Segerstrom Center for the Arts	Costa Mesa, CA
Signature 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 Smith Center	Las Vegas, NV
The Soraya, Cal State Northridge	Northridge, CA
The Tobin Center for the Performing Arts	San Antonio, TX
Walton Arts Center	Fayetteville, AR
Wolf Trap	Vienna, VA

Overview of results

76%

of those who experienced live in-person indoor performances in the past two weeks say they were 'comfortable' or 'very comfortable' with the experience

47%

purchased tickets, subscriptions or memberships in mid-December

62%

are already attending in-person programs

35%

of vaccinated respondents are waiting to attend until infection rates drop

72%

say they would be more likely to attend or would only attend given vaccinated-only admittance policies

88%

say that online programs will play a small role or no role in their cultural life once facilities reopen

Survey Responses

48

Participating
Performing Arts Centers and
Producers

9,883

Total responses
(December 15)

Executive Summary

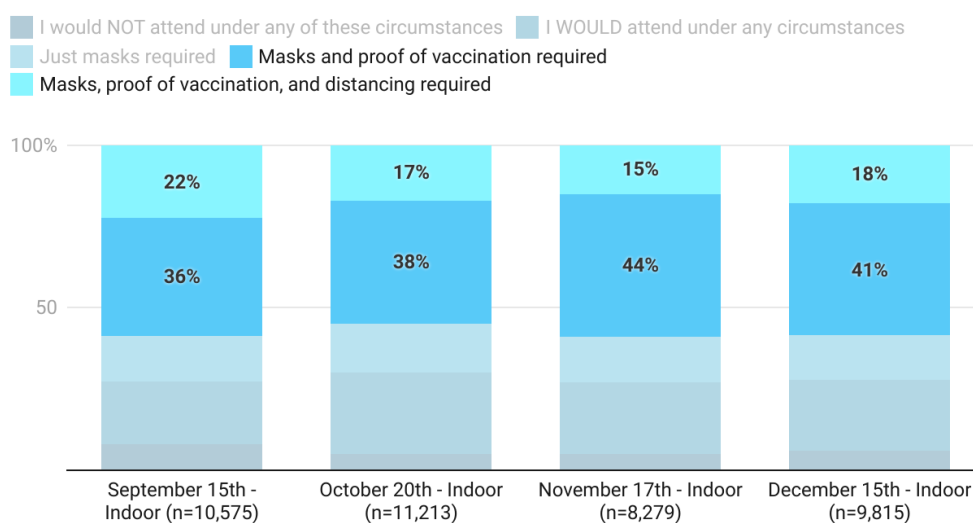
Health and safety expectations are holding steady relative to November, likely due to some breakthrough cases and the advent of the Omicron variant. A small drop in comfort for events attended in December was also observed. Despite increased concern and expectations for health safety among audiences, two thirds of respondents continue to attend.

Meanwhile, vaccinated only policies remain popular while concern levels rise and confidence in the horizon of a normal future declines. More audiences are waiting for infection rates to drop before attending, and a poignant symptom of the recent COVID variants is the observation of a notable drop in confidence that the vaccines will enable a return to normalcy with a year.

Current attendance continues for two thirds, while expectations for health and safety protocols remain steady

Health and safety expectations for indoor and outdoor events have held steady since November. As of mid-December, 59% say they expect at least masks and vaccination for indoor events. Stringent health safety requirements are likely driven by breakthrough cases and the advent of the Omicron variant.

Minimum requirements for attending indoors this week



n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 1: “What are the minimum health safety measures that you require in order to attend an indoor/outdoor cultural event this week?”

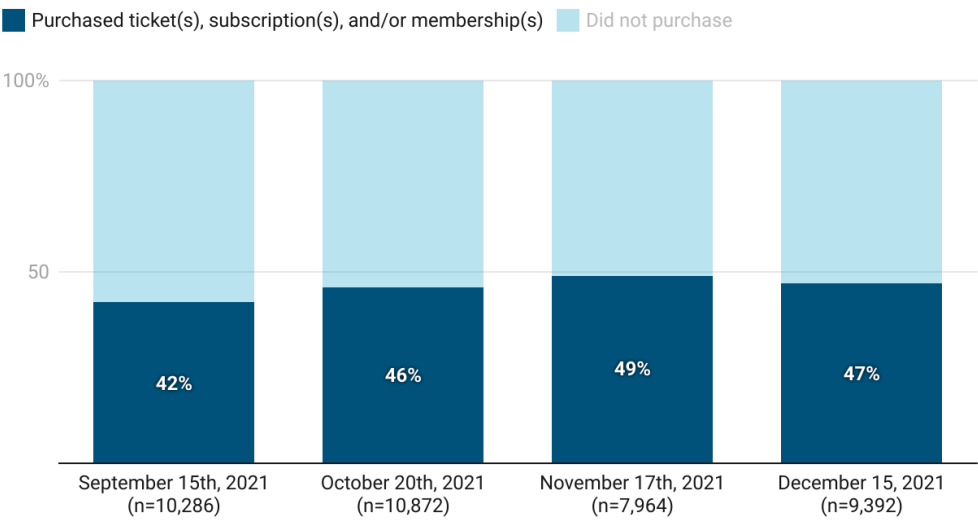
Those possessing a strong bond with their organization tend to have heightened expectations around current attendance. As of December, 65% possessing a strong bond with their organization expect masking and proof of vaccination policies indoors, versus only 48% of weakly bonded patrons.

Also, 71% of elderly patrons expect at least masking and proof of vaccination policies indoors, versus only 54% under age 35; that said, policy expectations among younger patrons have continued their increase since November.

Patrons in the Northeast region continue to be zealous in their expectations around masks and proof of vaccination for current attendance; 71% of audiences in the northeast expect masking and proof of vaccination indoors this week.

Sales have held steady since November; 47% of respondents purchased tickets, subscriptions, and / or memberships in mid-December.

Cultural purchases in the past two weeks



n=9,883 (Dec 15)
Chart: AMS Analytics • Source: Audience Outlook Monitor, November 2021 • Created with Datawrapper

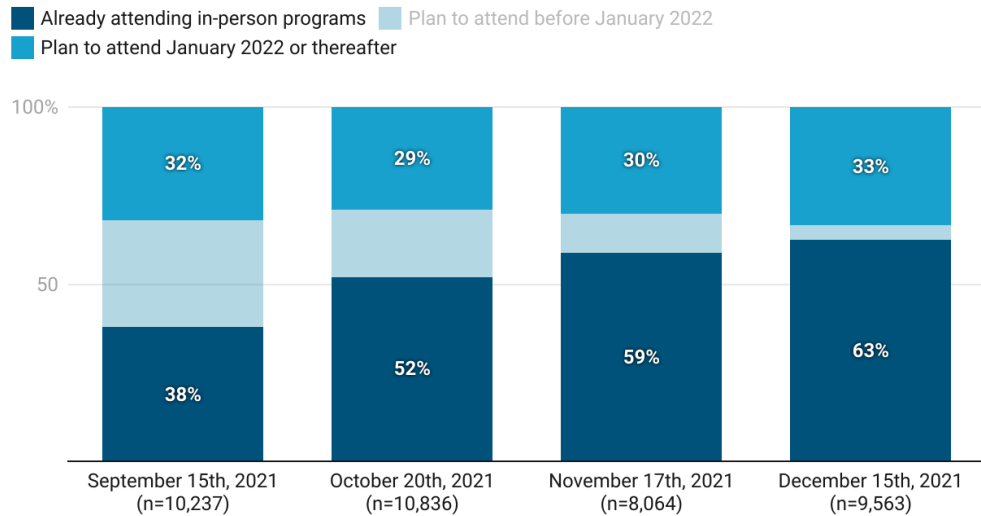
Fig 2: “In the past two weeks, did you make any cultural purchases?”

We continue to observe a strong divide between strongly bonded and weakly bonded patrons: 52% of strongly bonded audiences made purchases in December, versus only 38% of weakly bonded patrons.

While comfort levels in indoor venues have decreased notably, respondents feel most confident about being outdoors. 47% say they would feel ‘very comfortable’ walking around a botanical garden, and 50% say they would feel ‘very comfortable’ attending an outdoor festival or concert today.

While current attenders continue to increase, deferring attenders hold steady: as of mid-December, 63% reported that they were currently attending, while 33% said in December that they will wait until 2022 to resume attendance. This includes 21% who now say they will wait to resume attendance until April 2022 or later, the highest figure of long-deferring attenders since the summer.

When will you attend in-person performing arts programs?



n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 3: “When do you think you will resume attending in-person performing arts programs?”

Current attendance is driven by the increasing 70% of strongly bonded patrons who are already attending in-person programs. As little as 53% of patrons with a weak self-reported bond are currently attending, and 34% of weakly bonded patrons say they will wait to attend until April 2022 or later to resume attendance. Meanwhile, 21% of strongly bonded patrons expect to attend more arts and cultural events in the long term, versus 16% of those with a weak bond.

Older patrons are still the most cautious, though current attendance among the demographic continues to grow. 42% over the age of 65 still plan to delay their attendance into 2022, while 58% are currently attending. Meanwhile, seven in ten of those under age 35 are currently attending.

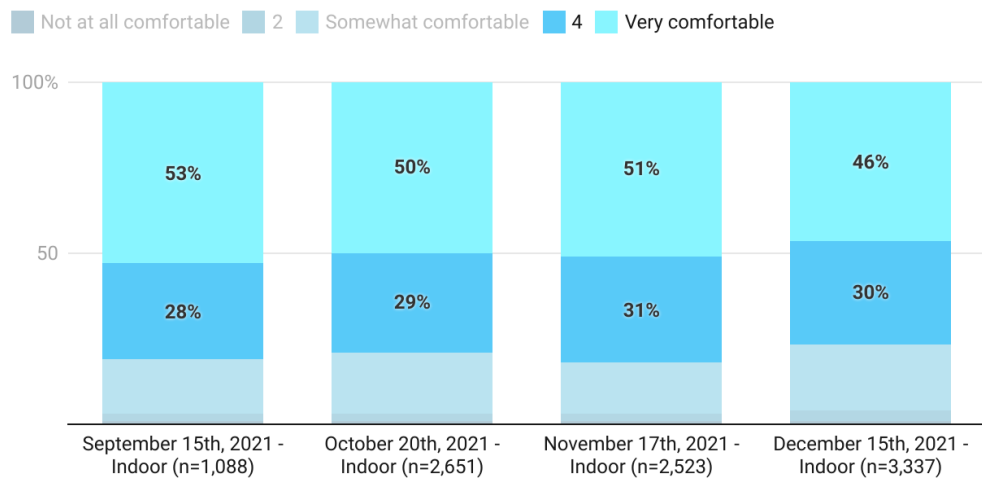
When it comes to trust in the institution, overall figures have remained consistent throughout the autumn: about 7 in 10 continue to trust their institution to enforce health and safety rules for audience members.

Institutional trust remains overwhelmingly strong among those with the strongest self-reported bond; 86% of strongly bonded patrons report that they trust their institution, whereas only 42% of those with a weak bond say the same.

A slight drop in comfort levels for events attended in December

43% of respondents attended a live performance in December; 97% of these performances were indoors. Comfort levels saw a slight drop from November: compared to the 82% of indoor attendees who rated their experience as 'comfortable' or 'very comfortable' in terms of health safety in November, 76% said the same of indoor experiences in December.

Overall, how comfortable did you feel at the indoor event in terms of your health safety?



n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 4: "How comfortable did you feel at the indoor event in terms of your health safety?"

Those who felt only 'somewhat comfortable' or 'not comfortable' in the theater in December still believe that organizations are doing everything they can in most cases, but remain concerned about sufficient social distancing and the number of attendees at events, proper mask wearing throughout the performance, and the numerous exceptions being made to vaccination policies:

"It's just a personal feeling – the vaccination check point felt more like eye candy, an appearance to check everyone."

"Have less people in the audience."

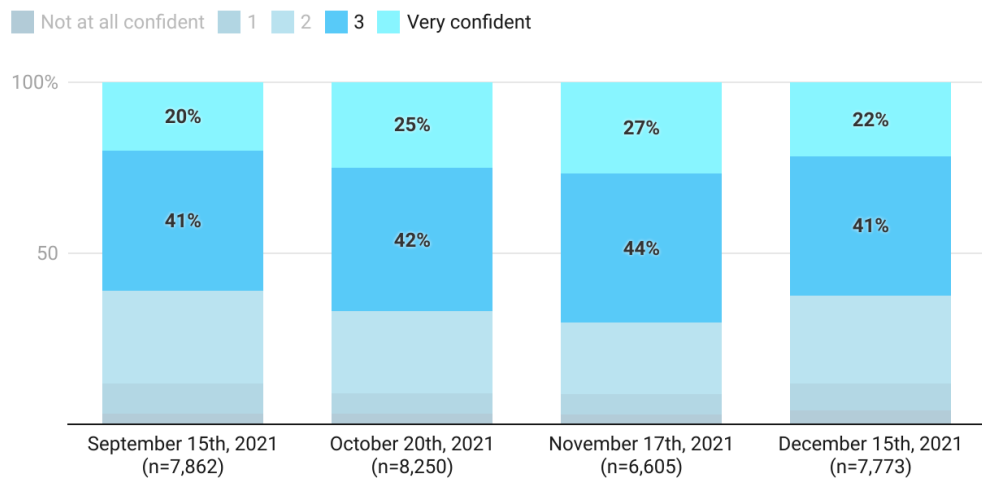
"No exceptions, or fewer, to the vaccine requirement."

"Make sure everyone keeps their mask up once the lights go out, and above the nose as well."

Vaccinated-only policies remain popular, but concerns about the protection provided by the vaccine have increased

A drop in confidence due to Omicron and holiday convenings results in only 63% of vaccinated respondents claiming that they are 'confident' or 'very confident' in the protection of the vaccine.

How confident are you that you are protected enough from COVID-19 to resume your normal activities?



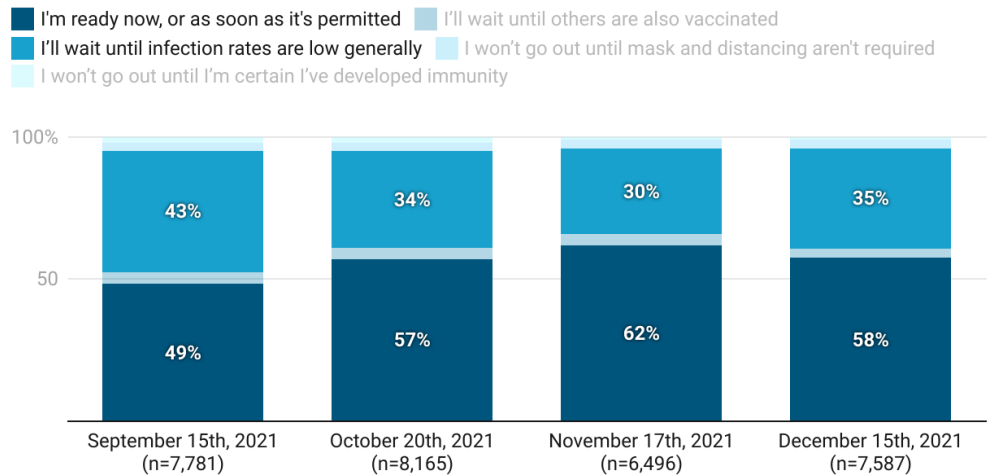
n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 5: "How confident are you that you are protected enough from COVID-19 to resume your normal activities?"

Positive feelings about current conditions have returned to similar levels as observed in October, with 58% saying they are ready to attend now or as soon as permitted, and 35% waiting for lower infection rates.

How do you feel about going out to cultural events? (vaccinated)



n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 6: “Now that you’ve been vaccinated, which statement best reflects how you feel about going out to cultural events?”

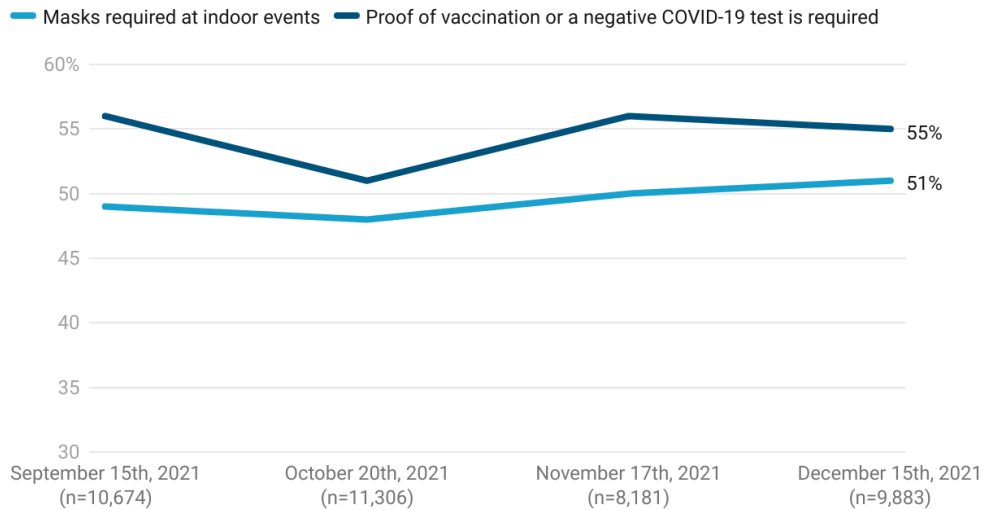
Concerns among weakly bonded patrons are growing most rapidly. While 66% of patrons possessing a strong bond with their organization are prepared to attend right now, only 47% of weakly bonded patrons say the same.

While overall positive perceptions regarding the current conditions have dropped, the gaps between age groups on the issue of infection rates continue to diminish. 38% of patrons over the age of 65 say they will wait to attend until infection rates drop, and 34% or less of those under 54 say the same.

After declines in specific concerns throughout the autumn, all concerns have risen yet again. Most prominent are concerns about the duration of immunity and safety of gathering in large numbers: 26% are ‘very concerned’ about the duration of their immunity provided by vaccination, and 30% are very concerned about gathering in large numbers.

Prerequisites have held steady, with 55% of December respondents considering proof of vaccination or a negative COVID-19 test to be a prerequisite, and 51% expecting mask policies at indoor events.

Prerequisites for attending this week



n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 7: “Which of the following policies are prerequisites for you to attend an in-person event this week?”

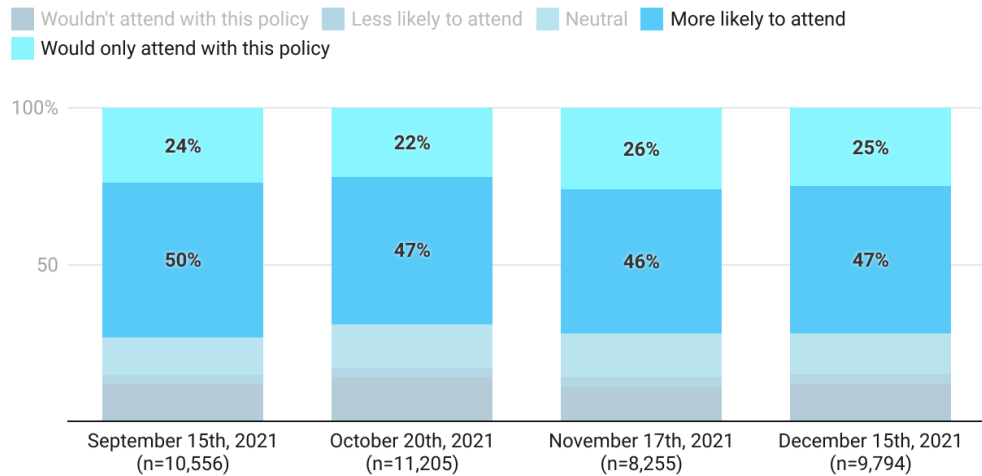
For 61% of strongly bonded patrons, proof of vaccination or a negative test is a prerequisite. The same is true of only 46% of weakly bonded patrons.

Age continues to be a motivating factor in considering vaccine and testing requirements as a prerequisite. Two thirds of patrons over the age of 65 consider the policies as prerequisite, while only about half of all younger audiences feel the same way.

Proof of vaccination or a negative test remains a prerequisite for 73% of patrons in the Northeastern states, whereas less than half of those in the south or Midwest consider the policy a prerequisite.

Interest in vaccinated only admittance has held steady since November: as of mid-December, 47% would be more likely to visit given this policy, and an additional 25% say they would only visit venues with a vaccination policy in place.

How would a vaccinated-only admittance policy impact your feelings about attending in-person events?



n=9,883 (Dec 15)

Chart: AMS Analytics • Source: Audience Outlook Monitor, December 2021 • Created with Datawrapper

Fig 8: “How would a vaccinated-only admittance policy impact your feelings about attending in-person events?”

Those who say they would only attend with this policy cite their personal comfort and safety and concerns about transmissibility, though they still express concern about breakthrough cases.

“I believe that the risks of serious infection, both of me and by me of others is significantly reduced by complete vaccination, including booster shots. But the chief problem that is emerging now with the Omicron variant is that of increased transmissibility...”

Older patrons continue to drive required vaccinated-only admittance, with 33% over age 65 saying they would require the policy in order to attend.

When asked about overall feelings regarding organizations who implement vaccinated-only policies, 70% continue to hold a positive view of the policies; this figure has remained consistent since the summer.

Strongly bonded patrons continue to drive the positive perception of organizations, with 75% of those with a strong bond viewing the organization

positively in light of vaccine policies; meanwhile, only 60% of those with a weak bond feel the same way.

A poignant symptom of the recent COVID variants is a drop in confidence in the return to normalcy. Compared to 16% in November who were 'not at all confident' in the ability of vaccines to enable a return to normal within a year, 22% now say they have no confidence in the return to 'normal' within a year.