AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

Published June 2022

This report reflects data collected nationwide in May 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

6,073

Total responses (May 18)

COVID cases climb nationwide, resulting in plateauing attendance and purchases, and decreased comfort levels

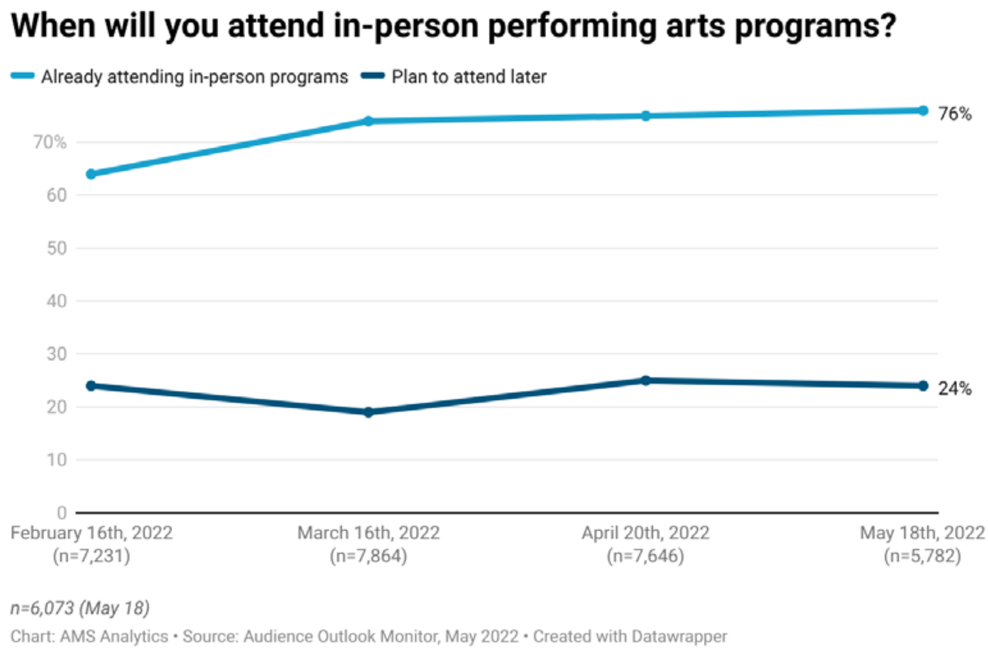

Fig 1: "When do you think you'll resume attending live performing arts programs?"

Sentiments about current attendance remain static as COVID infections continue to rise nationwide. In May, **76% reported that they are currently attending,** compared to 75% in April. The oldest patrons remain the most cautious of any age cohort; compared to 89% of those under age 35, only 70% over age 65 are already attending in-person programs.

Comfort levels have declined at both indoor and outdoor venues. As of May, **63% say they would feel 'very comfortable' at an outdoor festival or concert**, and **37% say the same of a large theatre or concert hall;** this represents a 10% decrease in comfort outdoors, and a 16% decrease in comfort indoors, relative to April.

The percentage of patrons who say they will attend under any health safety circumstances has decreased. Compared to 45% in April, **38% in May say they will attend indoors under any circumstances.** Meanwhile, 59% expect some kind of safety regulation to be in place (at least masks).

Purchases remain on a plateau, with **52% of respondents having purchased tickets or subscriptions in mid-May.** In May, 58% of audiences with a self-reported 'strong' organizational bond made purchases, versus 47% with a weak bond. Also, more than 56% of respondents under age 54 made purchases in the month of May, versus only 49% of those over age 65. Consistent with April, **58% of all patrons who bought tickets in May purchased them more than a month in advance of the event.**

Although COVID concerns are at the front of mind for 41% of patrons who have yet to attend, ***program interest, cost, and difficulty making plans*** are also dominant barriers interfering with attendance:

> **50% have not yet found a program they want to attend.** This figure is consistent with April, and is pronounced among those with a weaker bond: while about 47% with a 'strong' bond report this barrier to attending, 62% with a weak bond say the same.
>
> **41% report concerns about contracting or transmitting COVID-19 in May**, compared to 37% in April. 50% of patrons possessing a strong bond with their organization are concerned about COVID, compared to only 30% with a weak bond.
>
> **18% report concerns about the cost of attending** and personal budget limitations.
>
> **21% say making plans in advance is more difficult** than it used to be, primarily due to the uncertainty of the pandemic.

Steady and effective communication continues, as **58% say their organization has done an 'excellent' job of staying in touch and communicating.** An additional 31% say communication is 'good'.

As COVID cases continue to rise, concern and interest in mitigation increases

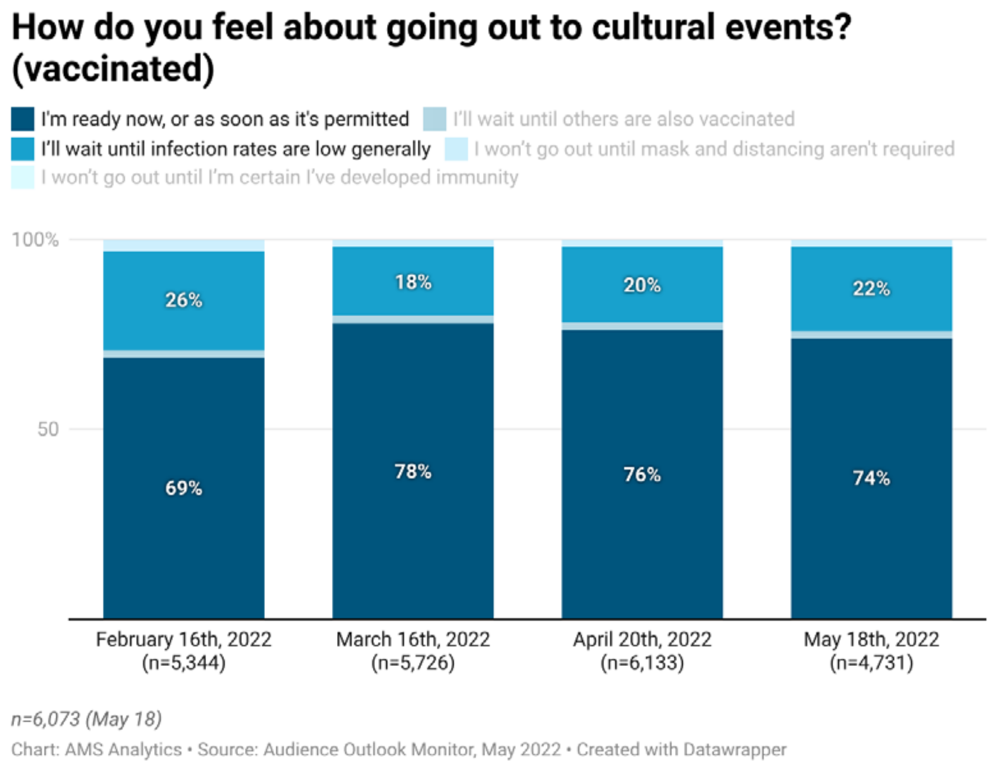

Fig 2: "Which statement best reflects how you feel about going out to cultural events?"

Increases in infection rates are reflected in concerns about attending, but a significant portion of patrons remain ready to attend now. Compared to 77% in April, **74% are ready to attend now.** 22% will wait for infection rates to drop before attending.

Concerns continue their climb from March and April, into May:

- **24% are very concerned about the duration of their immunity,** compared to 21% in April.
- **22% are very concerned vulnerability to a 'breakthrough' infection,** compared to 19% in April.
- **18% remain 'very concerned' about the safety of gathering in large numbers as of April,** compared to 16% in April.
- **17% are very concerned about transmitting the virus,** compared to 12% in April.

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Interest in vaccinated-only admittance has increased after decreasing throughout the first quarter of 2022. **64% of respondents are encouraged to attend by vaccinated only policies**, a figure which includes **12% who say they would only visit given this policy.** Interest in vaccinated-only policies remains strongest in the Northeast region where 20% still say they would only attend events with this policy in place, and an additional 51% say they are more likely to visit given the policy. Meanwhile, a growing 19% in the West region say they would only visit with this policy, accompanied by 49% who say they are more likely to visit given the policy.

Ticket policies, including re-seating, streaming, and booster-only admittance are progressively more intriguing to ticket buyers (which is presumably connected with the difficulty of making plans due to COVID uncertainty). The option to be re-seated in an emptier section at the last minute motivates ticket purchases for 56% of audiences, while the last-minute option to watch a livestream instead of attending a ticketed performance motivates an increasing 37% of respondents to purchase tickets. **Overall, 57% still say that booster-only admittance policies would have an influence on their purchase of individual tickets** in the near future; this is driven by 65% in the Northeast region, and 62% in the West.

Up from 45% in April, **54% overall 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. All regions saw increases in the need for masks since April, including a notable jump in the western region:

Region	**May**	**April**
Northeast	72%	65%
West	61%	44%
South	51%	43%
Midwest	40%	36%

Comfort levels have declined slightly; compared to 61% in April, **57% of respondents who have attended report that they were 'very comfortable' with their experience in May.**

For those who were less than ‘comfortable’ at a performance in May, the most dominant concerns centered around masking and distancing:

“I would have been more comfortable if masks were required.”

“Enforce mask and vaccine mandates.”

“As I look back on it, we felt close to the other guests.”