AMS ANALYTICS

AUDIENCE OUTLOOK MONITOR

Snapshot Report

All Cohorts

Published May 2022

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

Survey Responses

37

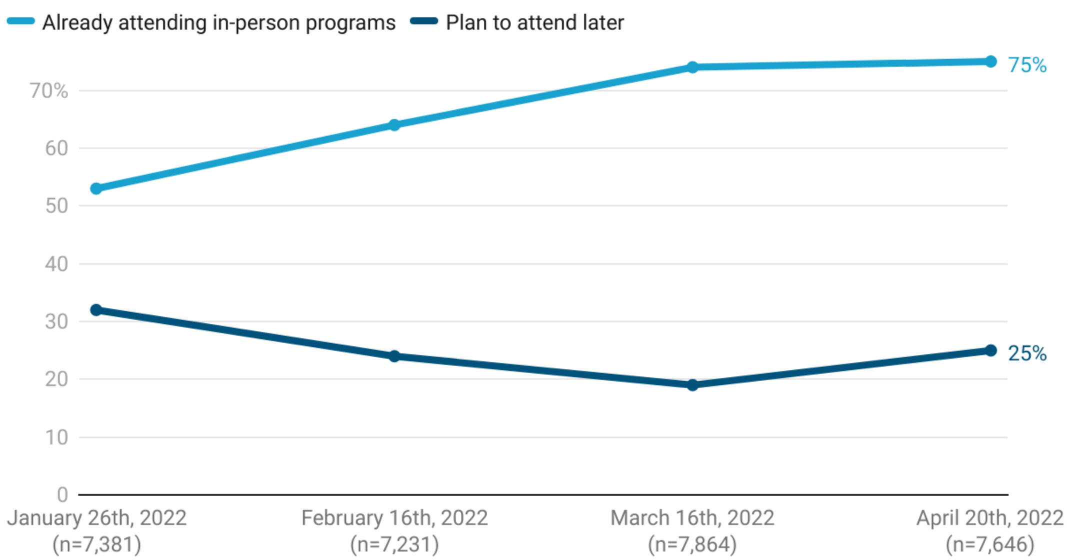
Participating Performing Arts Centers and Producers

7,968

Total responses (April 20)

A new COVID variant and uptick in cases levels out demand, but purchases and attendance remain strong

When will you attend in-person performing arts programs?



n=7,968 (Apr 20)

Chart: AMS Analytics • Source: Audience Outlook Monitor, April 2022 • Created with Datawrapper

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

The rapid improvements in sentiment from March have seen some leveling in April, presumably due in part to the impacts of the Omicron BA.2 variant. In April, **75% reported that they are currently attending,** compared to 74% in March. The oldest patrons remain most cautious of any age cohort; compared to 84% of those under age 35, only 69% over age 65 are currently attending.

Comfort levels have plateaued with both indoor and outdoor venues. As of April, **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;** these are identical to March's numbers.

Those who say they will attend under any health safety circumstances continue a moderate climb. Compared to 40% in March, **46% in April say they will attend indoors under any circumstances.**

Meanwhile, 64% say they would be willing to attend an event indoors, assuming the event required proof of vaccination but did not require masks. Attendance under these conditions (vax + no masks) is less popular in the Northeast than in other regions; only 51% in the northeast say they would attend under these circumstances.

54% of respondents purchased tickets or subscriptions in mid-April, representing a plateau relative to 52% in March. In April, 58% of audiences with a self-reported 'strong' organizational bond made purchases, versus 50% with a weak bond. Also, more than 58% of respondents under age 54 made purchases in the month of April, versus 50% of those over age 65. **57% of all patrons who bought tickets in April purchased them more than a month in advance of the event.**

Although COVID concerns are returning to the front of mind for some who have yet to attend, ***program interest and cost*** continue to stand in the way of patrons' attendance:

> **49% have not yet found a program they want to attend.** This figure is consistent with March, and is pronounced among those with a weaker bond: while about 38% with a 'strong' bond report this barrier to attending, 56% with a weak bond say the same.
>
> **37% report concerns about contracting or transmitting COVID-19 in April**, compared to 35% in March. 43% of patrons possessing a strong bond with their organization are concerned about COVID, compared to only 27% with a weak bond
>
> **22% 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 32% say communication is 'good'.

New COVID cases are resulting in plateauing comfort levels and increasing concerns, but the majority are still willing to attend

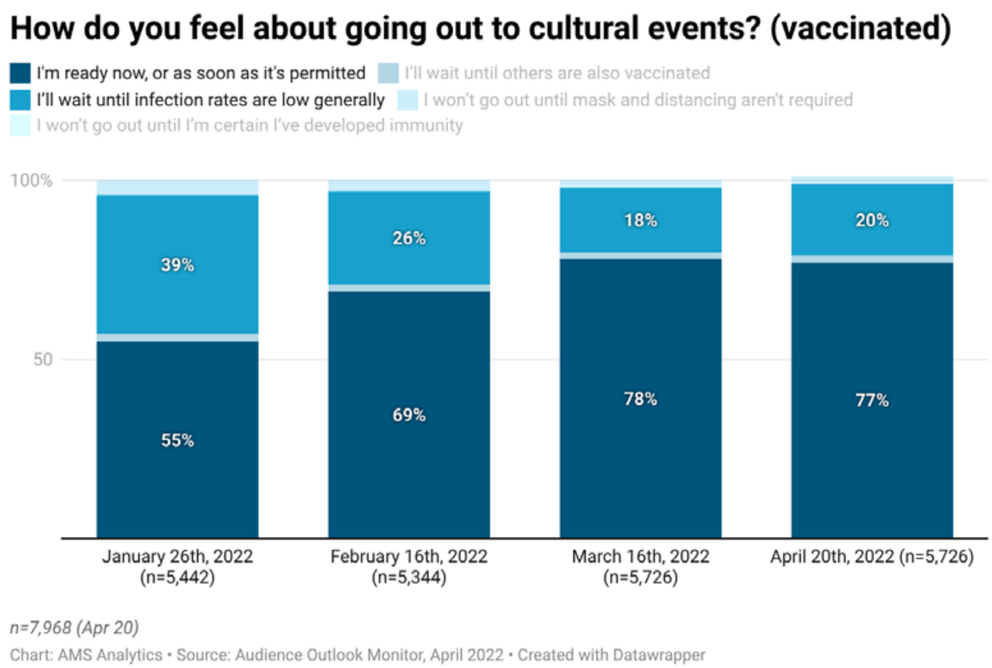


Fig 2: "Which statement best reflects how you feel about going out to cultural events?"

Despite some increases in COVID cases across the country, **77% are ready to attend now (including 72% over age 65).** Only 20% now plan to wait for infection rates to drop before attending.

Booster rates have leveled off at a combined 86% of arts audiences who are now both vaccinated and boosted, and an additional 9% who are vaccinated but not boosted. The highest rates of vaccination + booster are found among Northeast audiences (93%).

Specific concerns have risen once again due to an uptick in cases; most notably, **16% remain 'very concerned' about the safety of gathering in large numbers as of April,** compared to 11% in March. Also, 21% are *very concerned* about the duration of their immunity, compared to 18% in March.

Interest in vaccinated-only admittance is holding steady after a decreasing trend through the first quarter of 2022. **61% of respondents are encouraged to attend by vaccinated only policies**, a figure which includes **10% who say they would only visit given this policy.** Interest in vaccinated-only policies remains strongest in the Northeast region, where 19% 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.

Interest in re-seating and streaming options have seen a small uptick, while the option of booster-only admittance still motivates more than half of audiences to purchase. The option to be re-seated in an emptier section at the last minute also motivates ticket purchases for over half of audiences, while the last-minute option to watch a livestream instead of attending a ticketed performance motivates an increased 33% of respondents to purchase tickets. 51% 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 63% in the Northeast region.

A plateauing **45% 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 decreases in the need for masks, except the Northeast region:

Region	**April**	**March**
Northeast	65%	57%
West	44%	45%
South	43%	45%
Midwest	36%	39%

Comfort levels have reached a plateau as well; compared to 64% in March **61% of respondents who have attended report that they were 'very comfortable' with their experience in April.**