Executive Briefing for November 2021
Bay Area Arts & Cultural Organizations
9:00-10:00 a.m.
National and International Study Cohorts
Phase 2 (Feb. - Nov. 2021)

- Boston (multi-disciplinary cohort, Arts Boston) Bi-monthly (April)
- Chicago (multi-disciplinary cohort, League of Chicago Theatres) Bi-monthly (March)
- Detroit (multi-disciplinary cohort, CultureSource) Bi-monthly (Feb.)
- Milwaukee (multi-disciplinary cohort, Imagine MKE) Bi-monthly (April)
- New Jersey and Connecticut theatres (New Jersey Theatre Alliance) Bi-monthly (Feb.)
- New York City (Off-Broadway theatres, TDF) Monthly (March)
- New York City (large institutions, multi-disciplinary)* Monthly (Feb.)
- Pittsburgh (multi-disciplinary cohort, Greater Pittsburgh Arts Council) Bi-monthly (March)
- National orchestra cohort (League of American Orchestras) Monthly (Feb.)
- Performing Arts Centers (US national cohort)* Monthly (Feb.)
- San Francisco (multi-disciplinary cohort, Theatre Bay Area) Bi-monthly (March)
- University presenters cohort (US national cohort)* Monthly (March)
- Washington DC cohort* Bi-monthly (March)
- Norway (nationwide, multi-disciplinary cohort, NPU/Audiences Norway) Three times (May)
- Australia (nationwide, multi-disciplinary cohort, Patternmakers) Three times (March)

*managed in partnership with AMS Analytics
Key Indicators:
Data collected Nov. 9-12
Perceptions of infection rates improved incrementally in November (source: TBA Cohort)
As of mid-November, 42% of respondents in the Nat’l Orchestra Cohort report a household vulnerability to Covid-19, unchanged since August.
We’ve also been tracking loss of household income due to the pandemic, and finding that younger ticket buyers were more heavily impacted, compared to older patron.
As expected, Nov. saw a large increase in the percentage of respondents going out to live performances (now at 44% for TBA Cohort)
Progress with Vaccination
Arts audiences were fast to get vaccinated; Bay Area uptake was among the highest in the country.
When will vaccinated folks be ready to go out again? We’re now back to where we were before the Delta variant surge, with 62% saying they’re ready now, and 31% still saying they’re still waiting for infection rates to go down (source: TBA Cohort)
What are people concerned about?

Vaccinated: Do any of the following concerns figure in your thinking about going out to cultural events, now that you’re vaccinated?

(The options "You might transmit the virus" and "How long immunity will last" were also on protocol 4-5)
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Confidence in level of protection against Covid-19 improved a bit in November, but has not recovered from the big drop in July

Vaccinated: Now that you’ve been vaccinated, how confident are you that you are protected enough from COVID-19 to resume your normal activities?

(Also on protocol 5)
Resumption of Demand for Cultural Events
The figure for level of comfort attending “a large theatre or concert hall” recovered in Nov., but is still only moderate (source: TBA Cohort)
Levels of comfort “walking around a museum or gallery” are higher, but still not as high as outdoor events (source: TBA Cohort)
About 75% are willing to go out with masks and proof of vaccine. Note the decline in the percentage of respondents who’d also require distancing.
...but look at the differences between Milwaukee and San Francisco
As of Nov., 60% have already attended, while 22% won’t attend until January or thereafter, and 16% won’t attend until April or thereafter (source: TBA Cohort)
Attitudes about vaccinated-only admittance policies
Pre-requisites: For November, 78% won’t attend without a proof of vaccination requirement, while 59% won’t go out without mask requirements (source: TBA Cohort)
“Deal breakers” haven’t moved for several months; the figure for proof-of-vaccine is only 4% for Bay Area audiences, and just 5% for masks.
Favorable attitudes about proof-of-vaccine admittance policies dominate (source: TBA Cohort)
Checking-in on digital participation
Engagement with digital content has been more or less steady for months, even as live events resume.
Five major digital strategies - for deeper discussion

• Product line extension/expansion
  - Digital content as a means of expanding the paid audience for core programs

• Brand awareness and accessibility
  - Digital content as a means of enhancing brand awareness or increasing accessibility for audiences who experience challenges to attending in-person

• Engagement around live programs
  - Digital content as a means of deepening impact and engagement with live programs

• Increase frequency, retention
  - Digital content as a means of reducing churn and increase frequency

• Audience development
  - Digital content as a means of education, exposure, and expanding aesthetic boundaries
Tracking the re-entry experience
Overall, most first-time returners felt comfortable or very comfortable at the event they attended, but comfort level varies according to perceptions of epidemiological conditions.

Most comments related to requests for greater enforcement of health safety protocols.
Household vulnerability is an even stronger predictor of comfort level among first-time returners.
Takeaways

(posted to www.audienceoutlookmonitor.com)
So, here we are after 18 months of tracking audiences...

- The sector has reopened, and the market is grinding back to life
- Demand is diminished, and will continue to be diminished for many months
  - Sales projections and/or inventory should be lowered from pre-pandemic levels for at least another year, or probably two
- Assuming no further surges, the market can be expected to slowly improve
  - Everyone should be making contingency plans for another slow-down or shut-down due to emergence of a new variant, and possibly a vaccine-resistant variant
- Long-term hold-outs include:
  - Those who are not vaccinated or object to health safety protocols
  - Those with household vulnerabilities who continue to feel the risk is not worth the reward
  - Those who’ve exited the marketplace and found attractive alternatives for their entertainment time/dollars
- Need to start planning now for when and how to drop mask mandates
  - Some people will wear masks for the rest of their lives
  - Likely backlash in the short term if proof-of-vaccination requirement is lifted too early
- Need strategies for accommodating those who require enhanced health safety, at least in the short-term, if not longer
- The digital marketplace is ours for the making
- What programs and formats will attract the next generation of audiences?
Discussion