AUDIENCE OUTLOOK MONITOR

ArtsBoston Membership Briefing & Discussion of Implications for Reopening
May 13, 2021

Alan Brown, WolfBrown
www.audienceoutlookmonitor.com

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Progress with Vaccination

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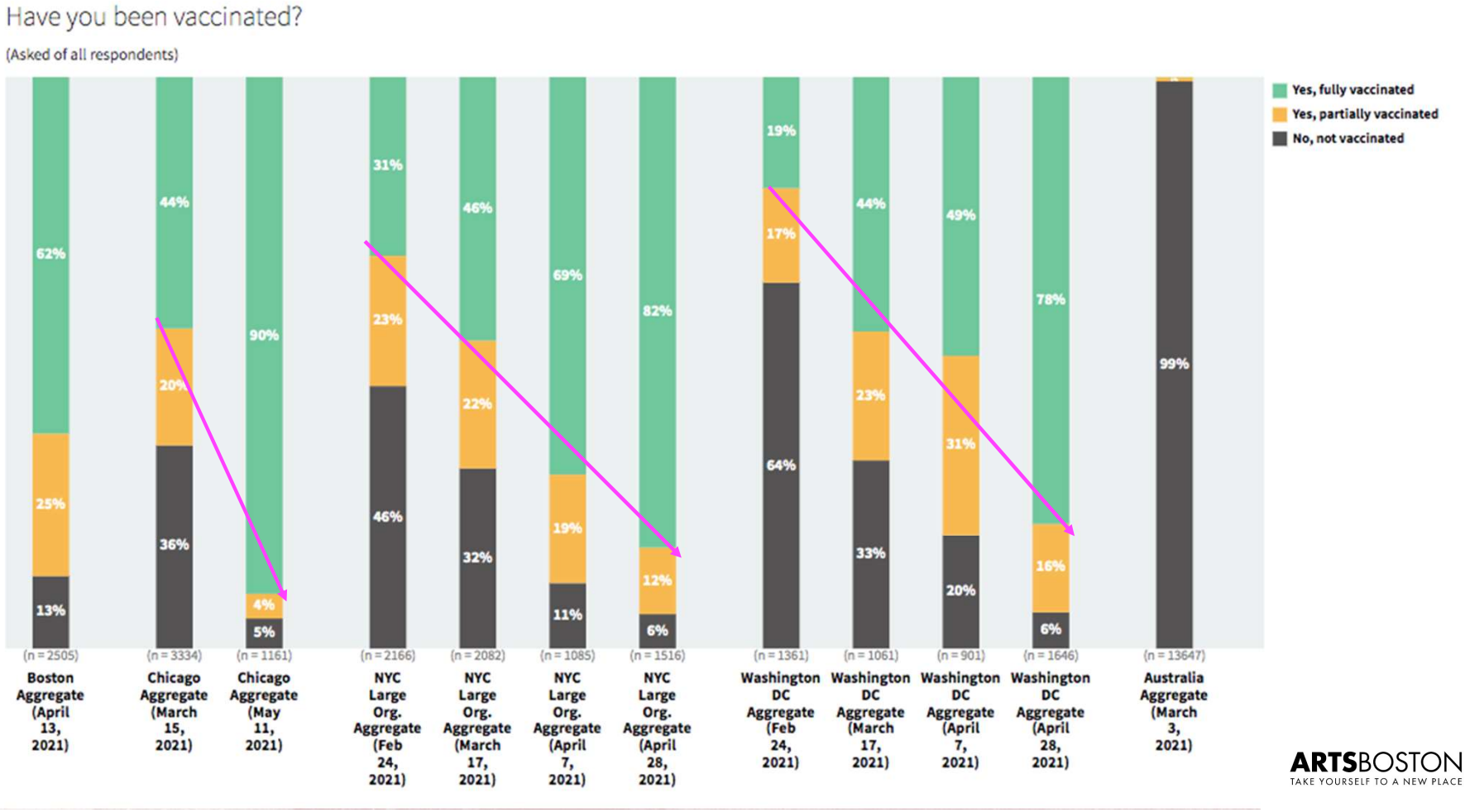
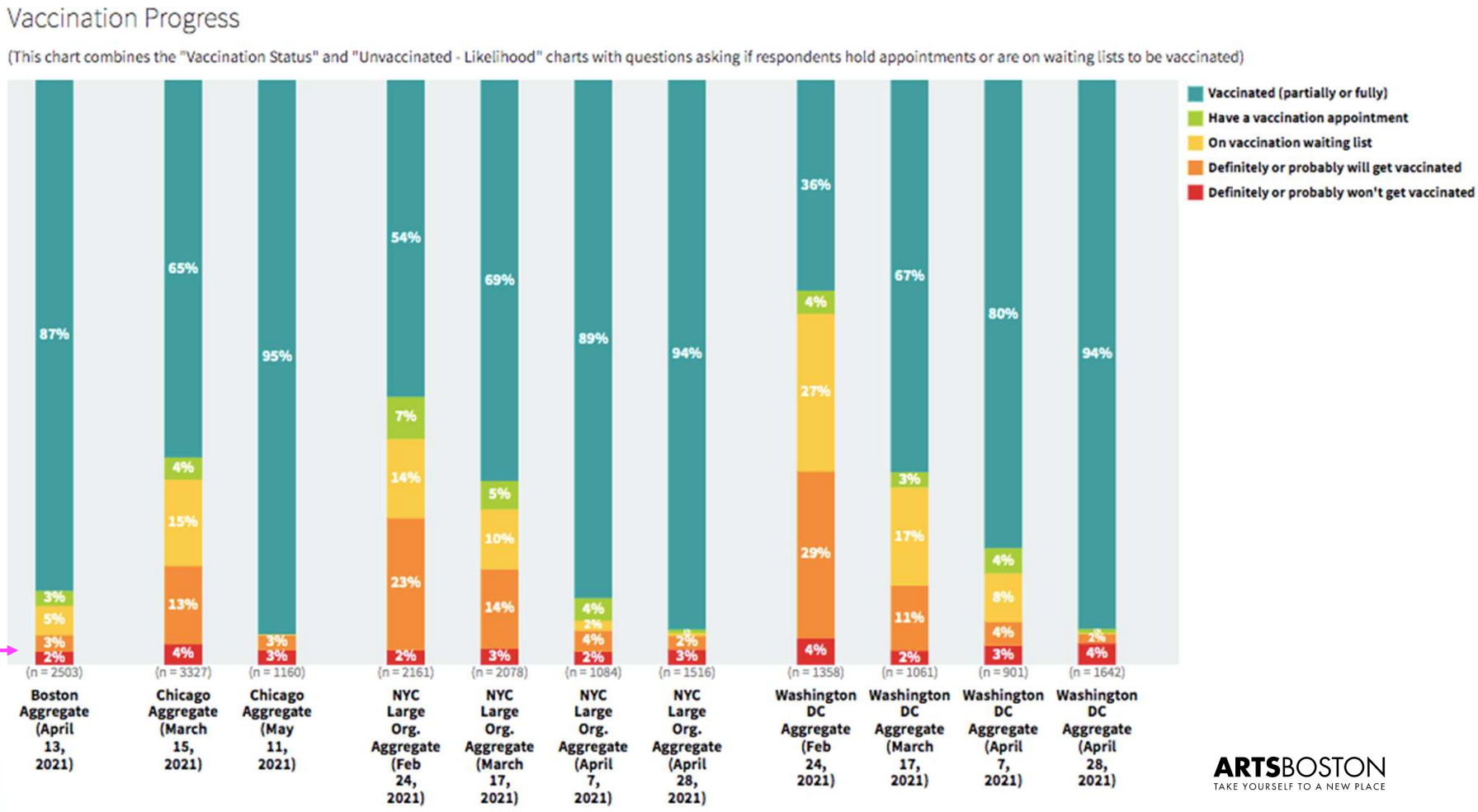
Dramatic progress with vaccination continues, with significant movement from February through May



Destination for Boston arts audiences is 98% uptake on vaccination



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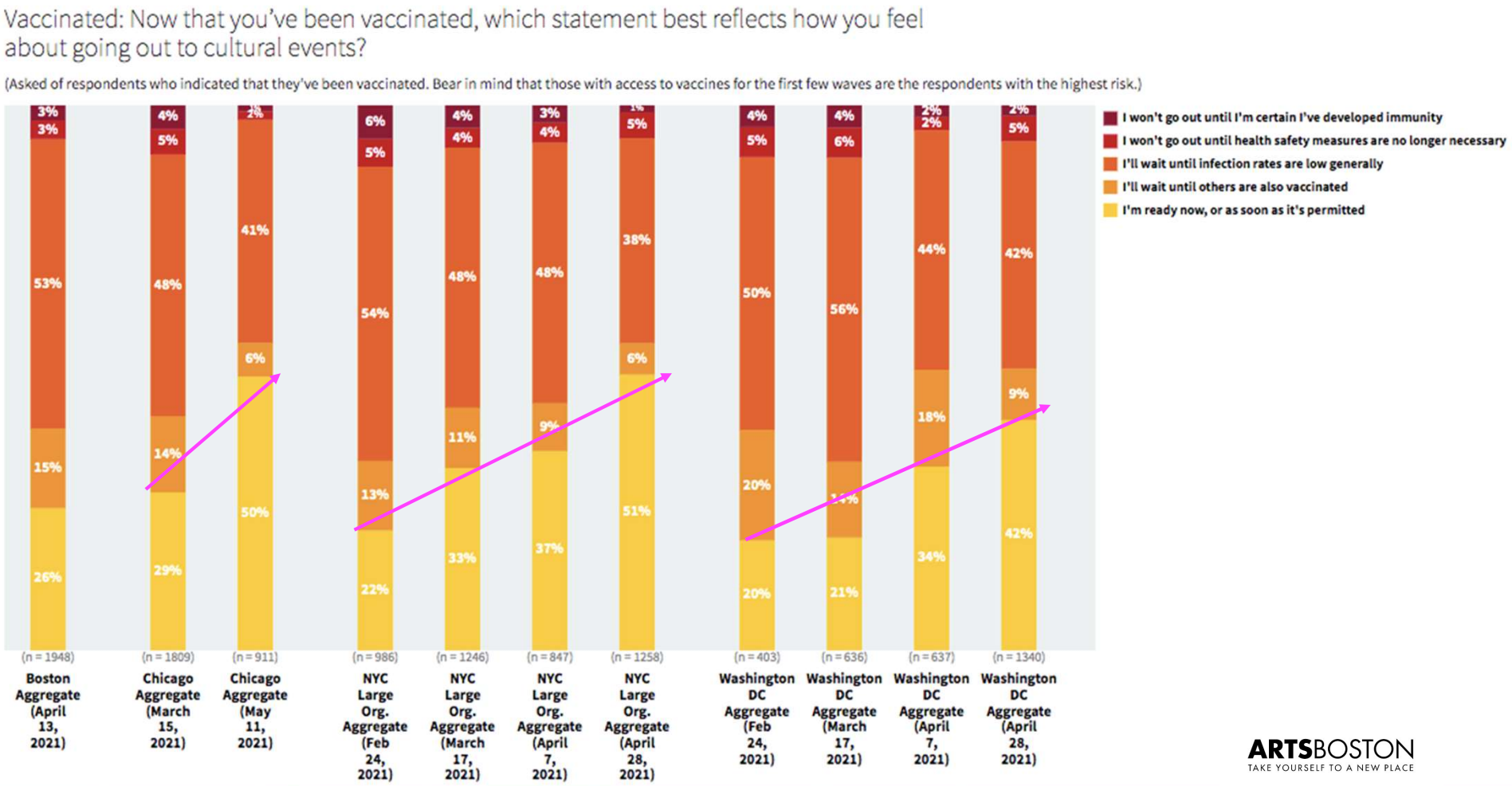
But, when will vaccinated folks be ready to go out again? An increasing proportion are ready now, but we've a long way to go



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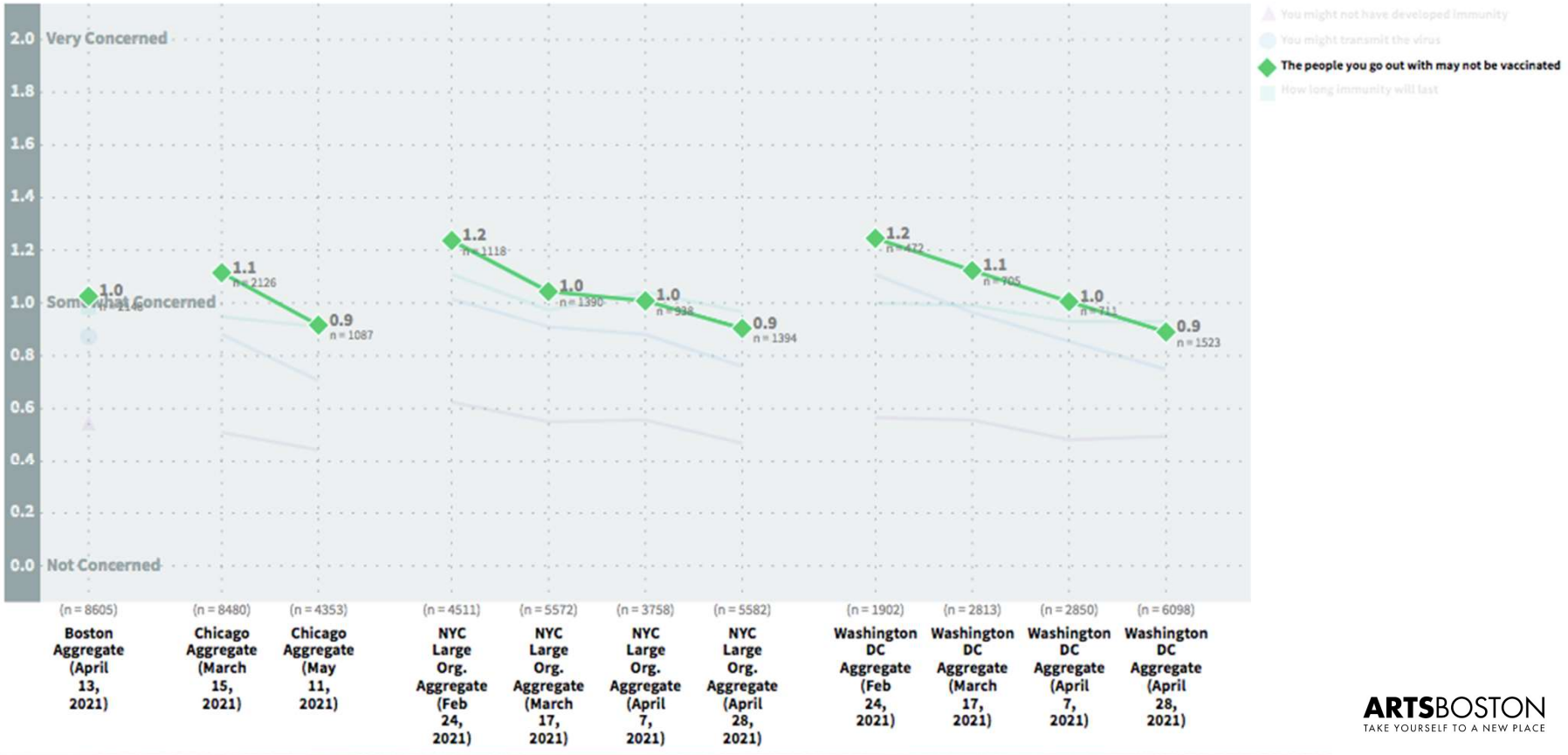
#1 Concern: Waiting for others to get vaccinated - declining

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

(Asked of respondents who indicated that they've been vaccinated)



#2 Concern: Not sure how long immunity will last - flat

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

(Asked of respondents who indicated that they've been vaccinated)

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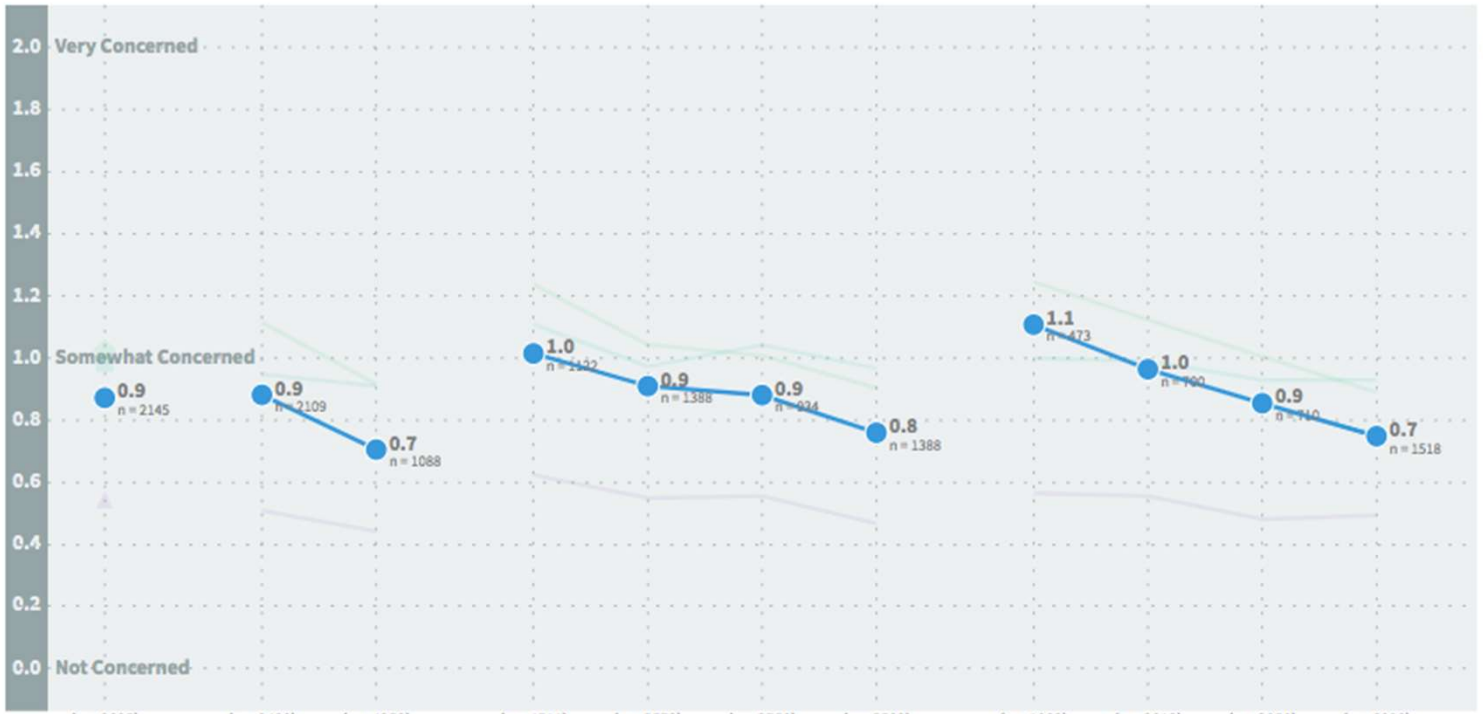
#3 Concern: Risk of transmitting the virus to others - declining

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

(Asked of respondents who indicated that they've been vaccinated)



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#4 Concern: Uncertainty over whether or not I have immunity - low but persistent

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

(Asked of respondents who indicated that they've been vaccinated)

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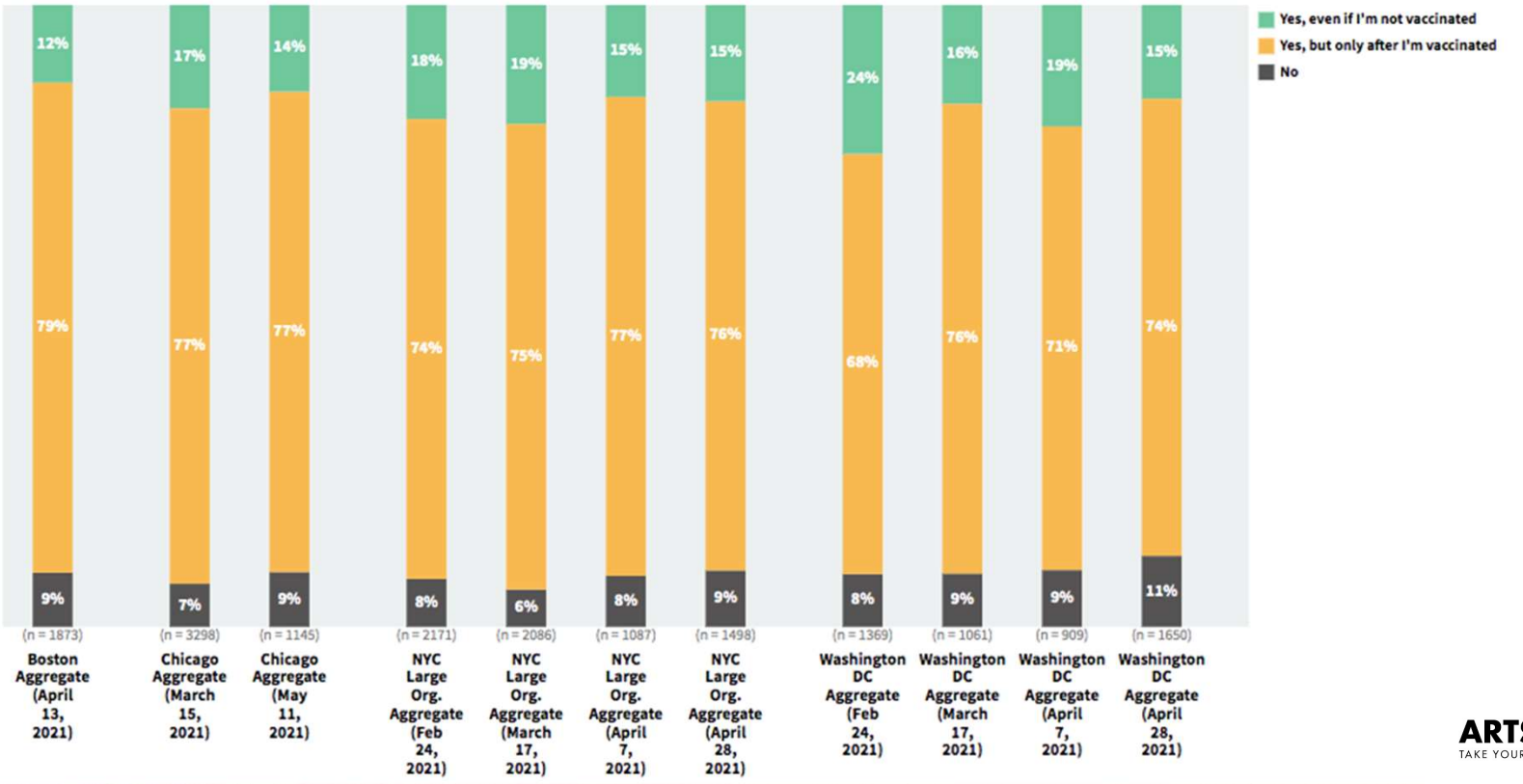
Nine in ten will comply with health safety measures at perf. arts venues, regardless of vaccination status (no change)

Performing Arts: If you are required to wear a mask and adhere to distancing guidelines and other health safety precautions, would you still attend our mainstage performances and events?

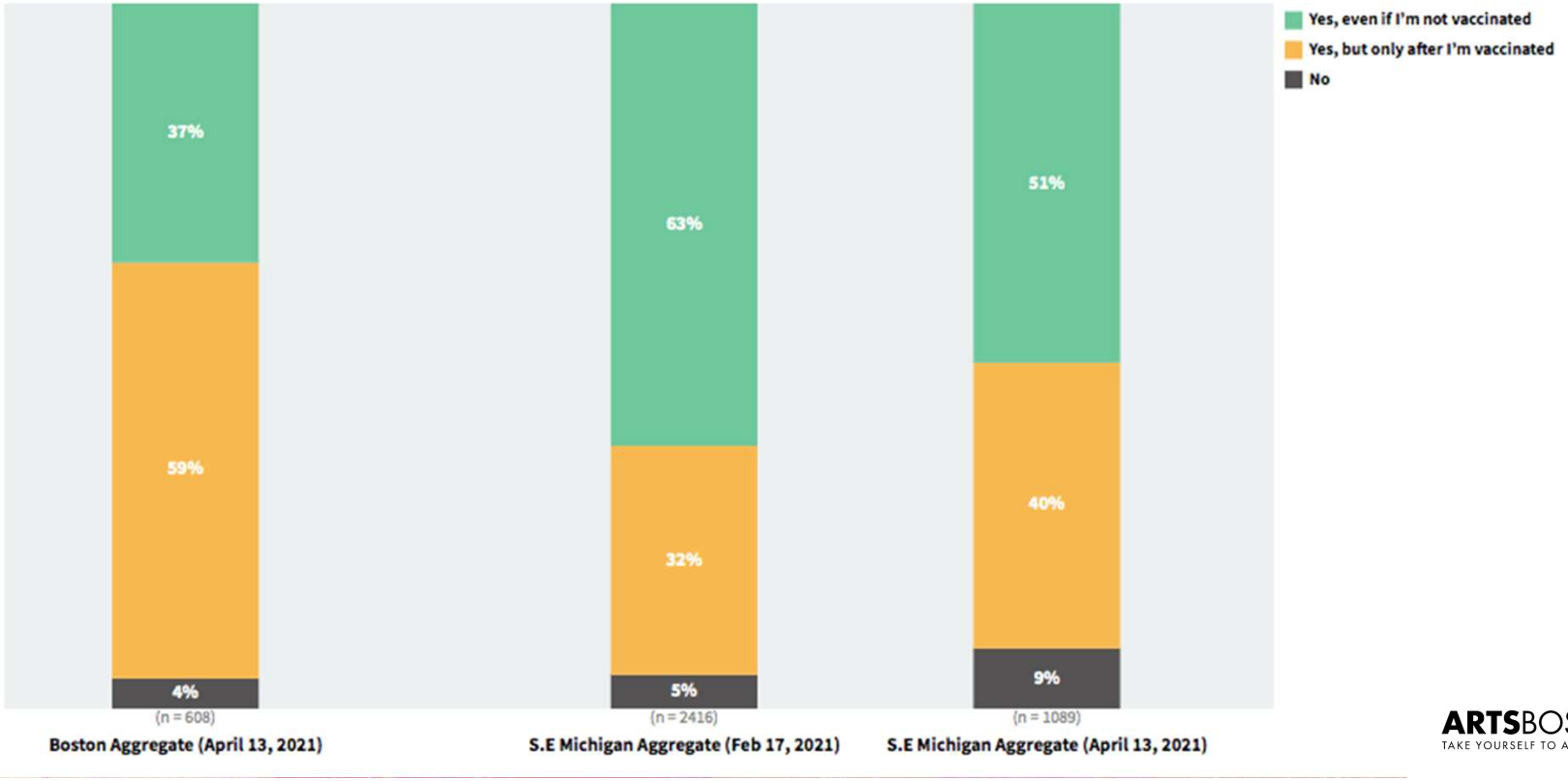
(Asked in reference to the organization that sent the survey)



A similarly high proportion will comply with health safety measures at museum, regardless of vaccination status

Museums: If you are required to wear a mask and adhere to distancing guidelines and other health safety precautions, would you still visit?

(Asked in reference to the organization that sent the survey)



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Resumption of Demand for Cultural Events

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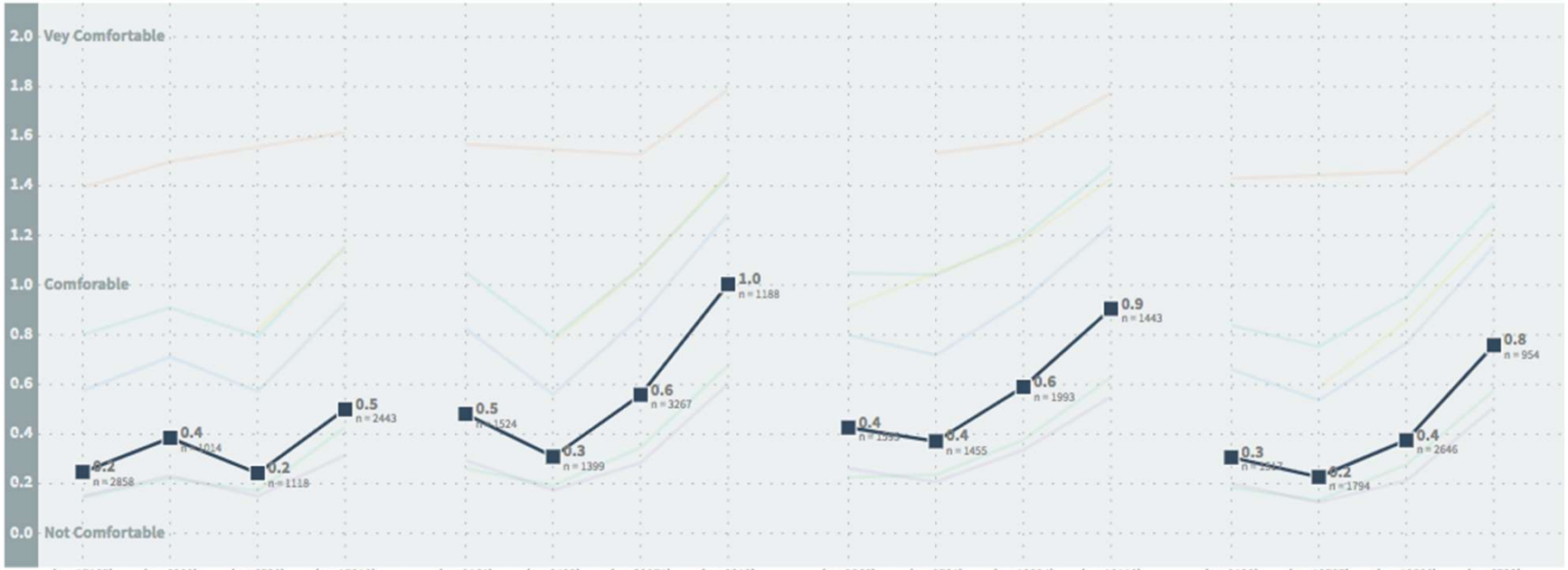
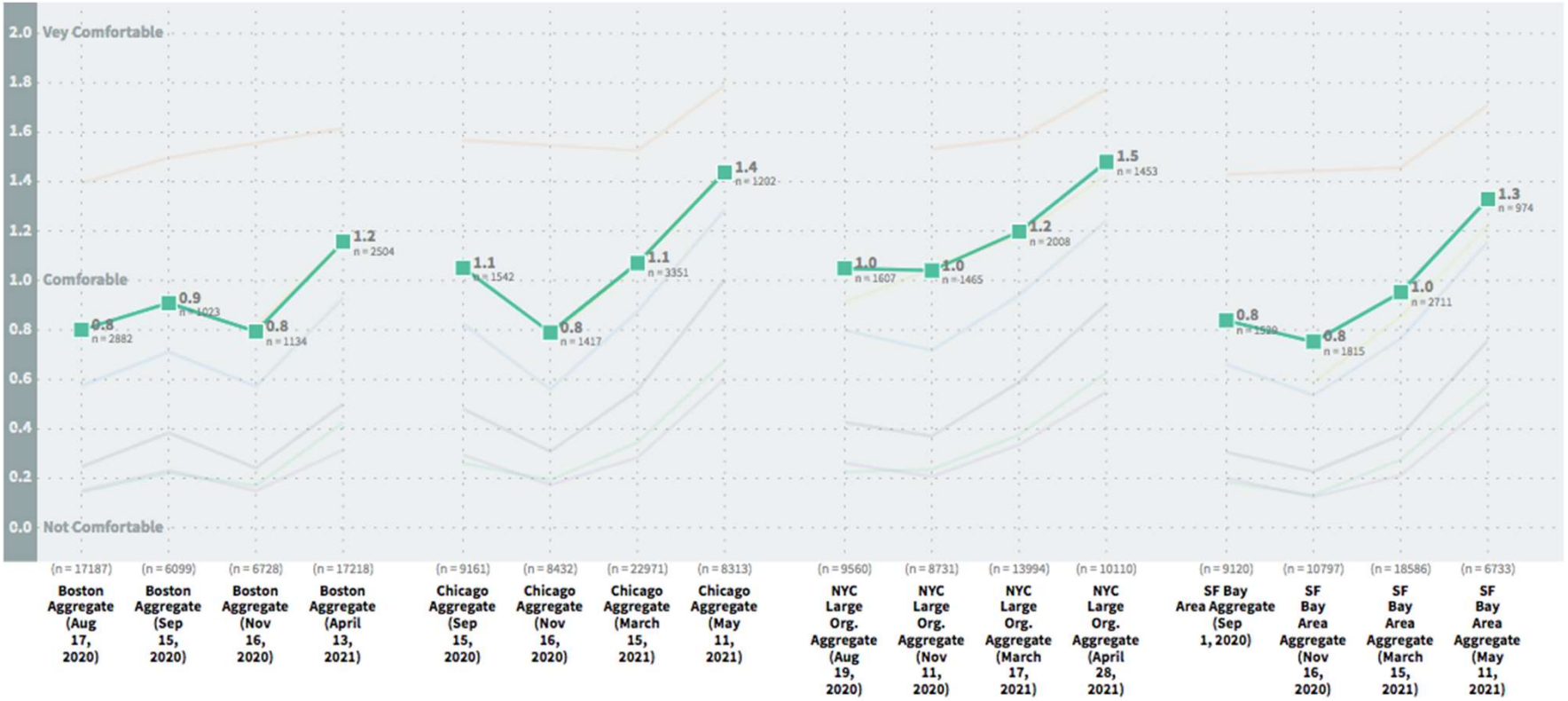
The upward trend in comfort level with “large theatre or concert hall,” but there’s still a long way to go

How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following social distancing and other health and safety procedures?



A similar upward trend is seen in regards to “walking around a museum or gallery,” with higher overall comfort levels

How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following social distancing and other health and safety procedures?



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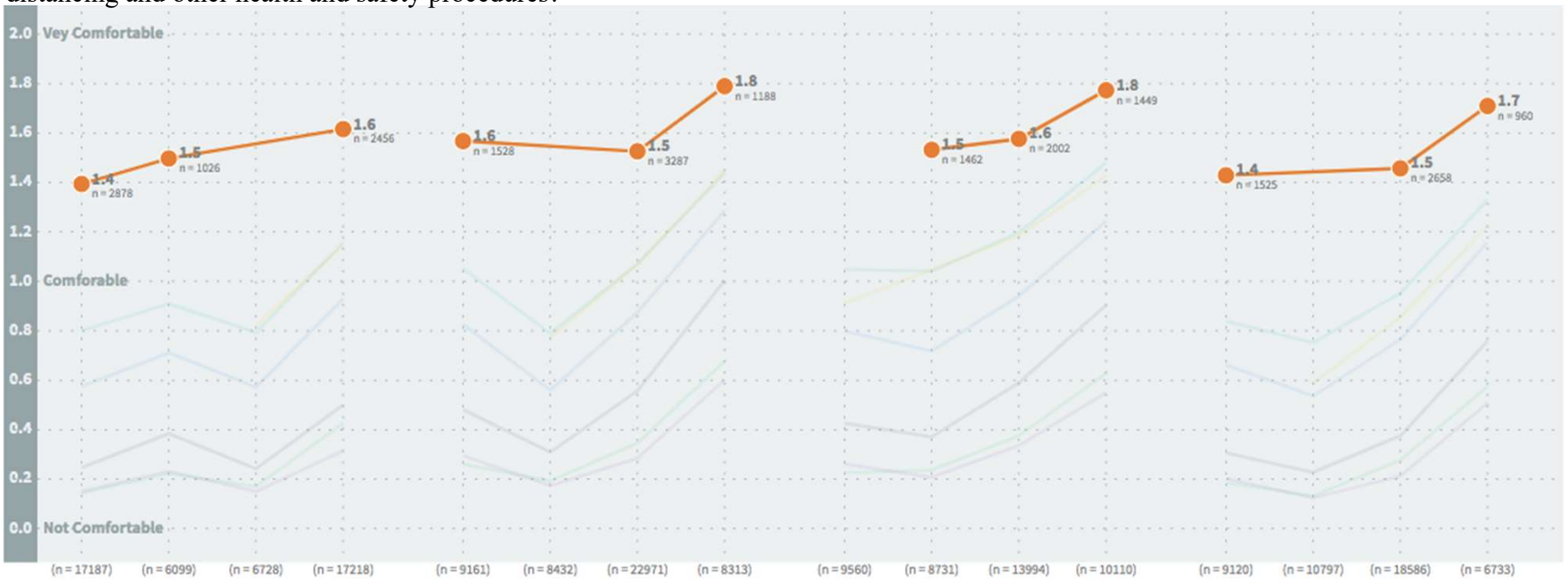
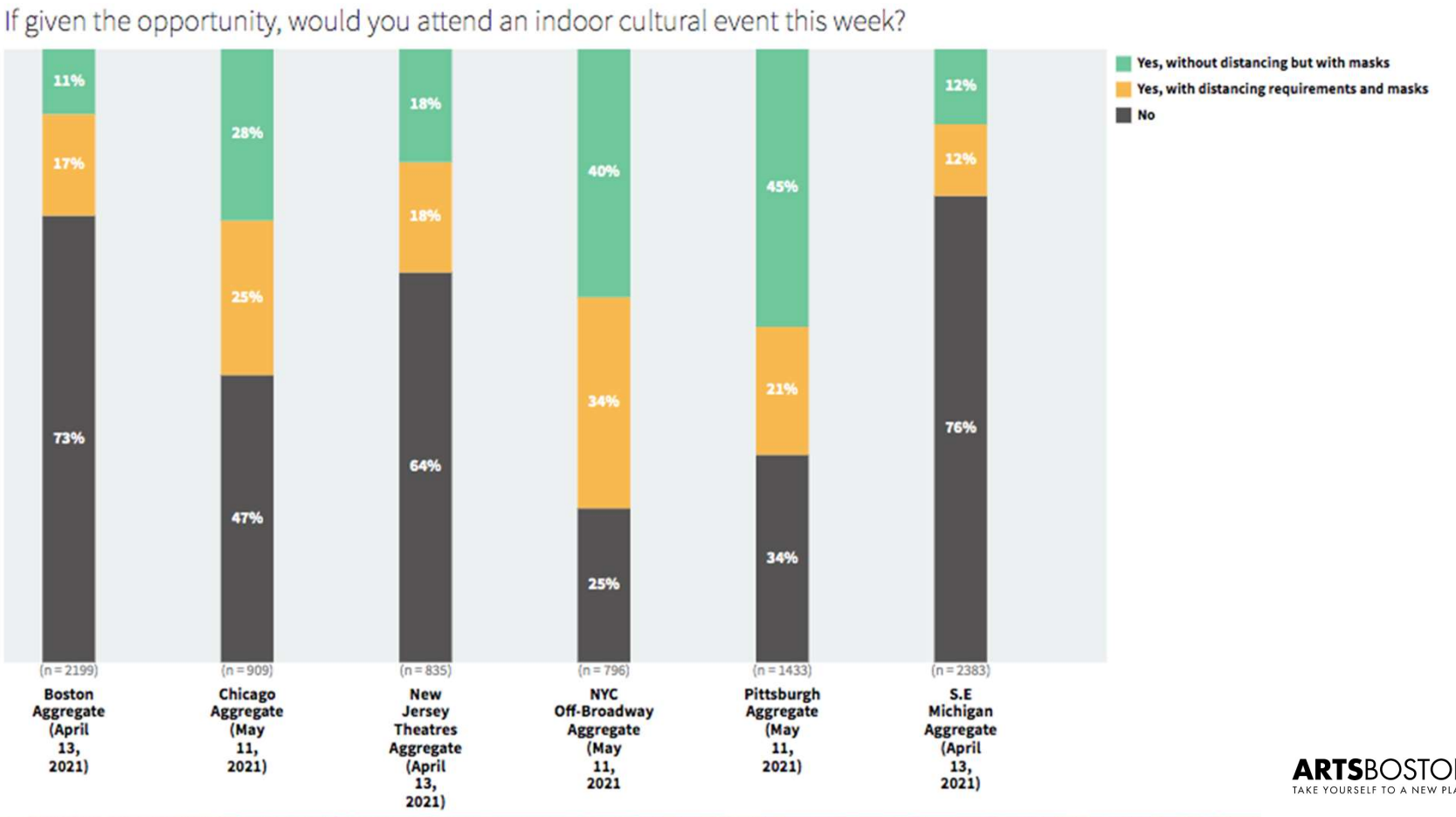
Most respondents are quite comfortable “walking around a botanical garden or zoo” (i.e., outdoor cultural attractions)

How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following social distancing and other health and safety procedures?



Readiness to return to indoor events was at 27% for Boston (April), most with distancing, but has leapt forward in other cities (May)



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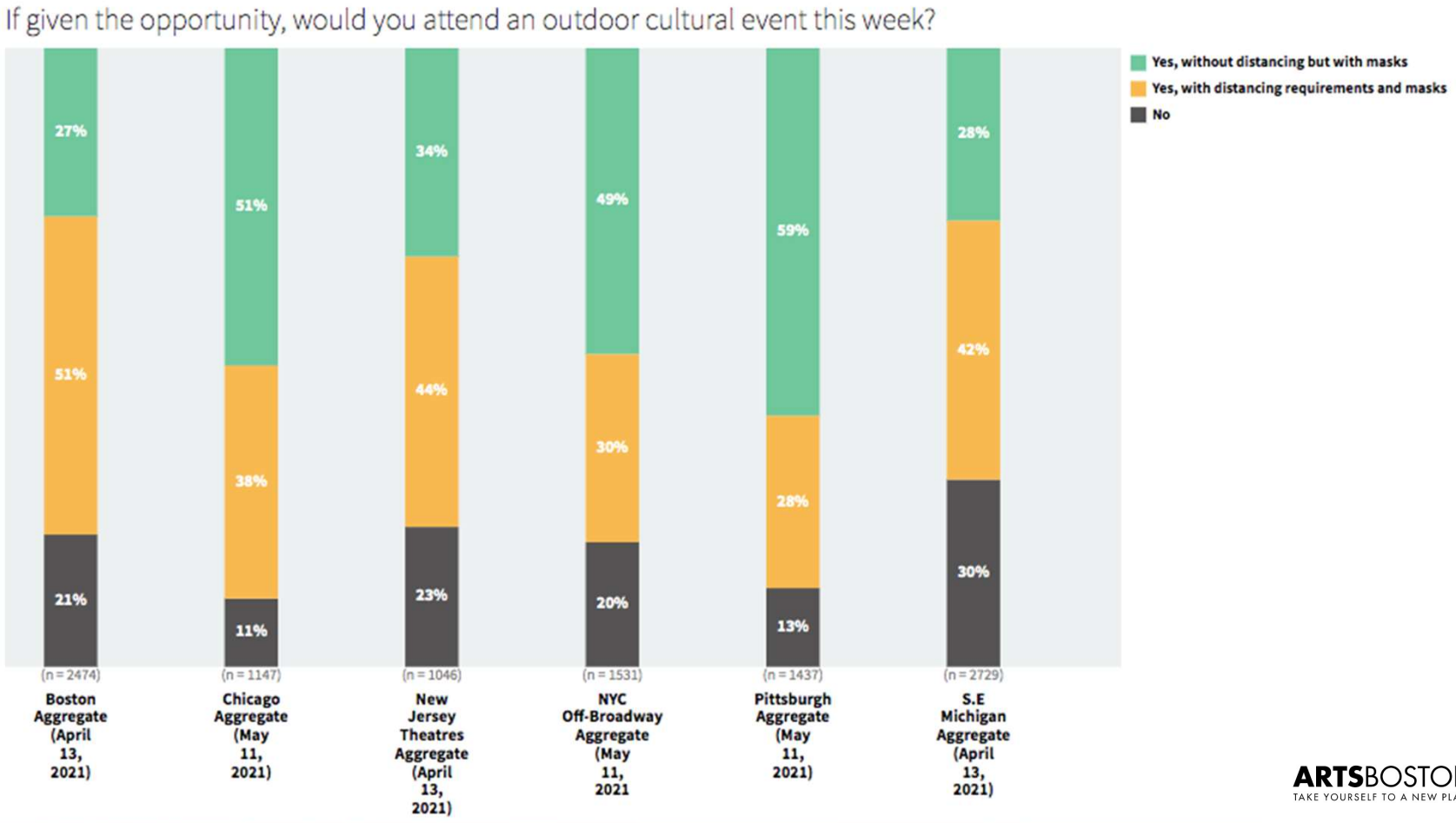
Readiness to return to outdoor events is much higher, at 80% for Boston; most would still require distancing



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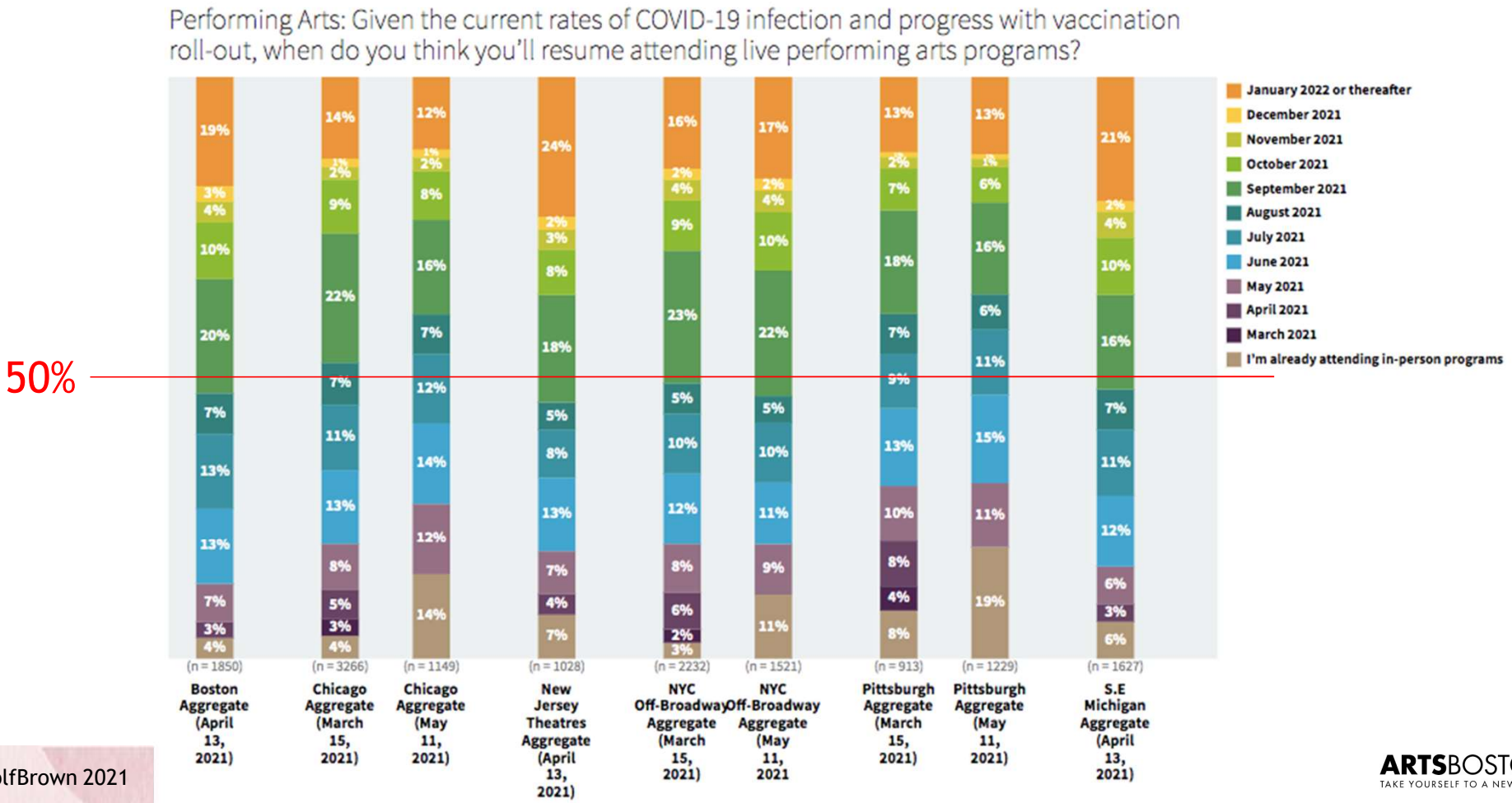
The typical Boston respondent still believes she'll be going out in September (April); the return date is nearing a bit in other cities



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Key Indicators of Demand for Digital Programs

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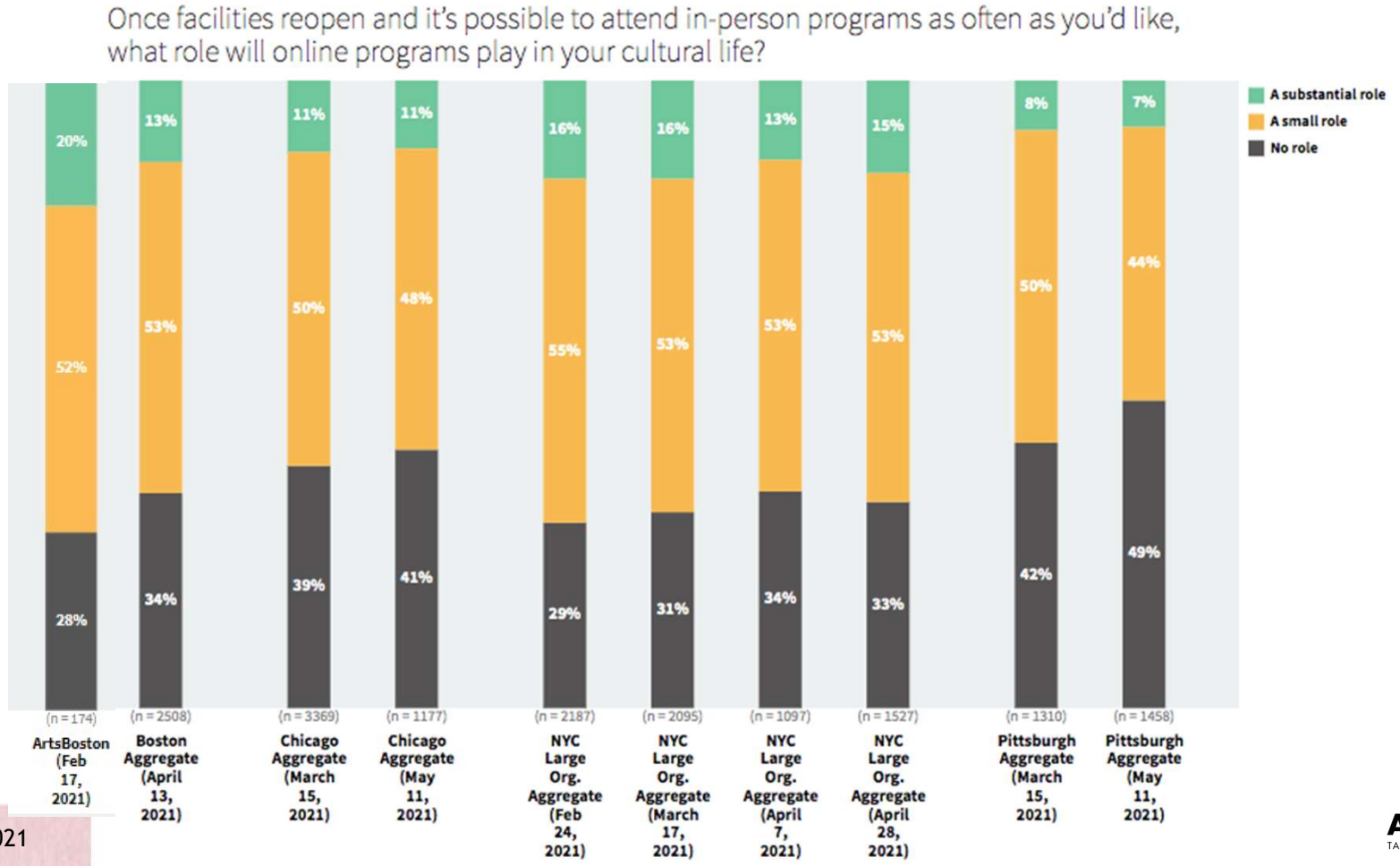
Only one in ten say that online programming will play a “substantial role” post-pandemic, but many say it will play a “small role”



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Takeaways for April/May

- Audience vaccination has likely plateaued at ~95%
- Roughly half of vaccinated folks are not ready to go out yet, waiting for infection rates to drop to lower levels
- Expect difficulty reaching herd immunity in some areas (MA is bright spot)
- Resumption of demand for indoor events (i.e., those who are ready to go out now) currently hovers around 40% to 50% for Boston
- Around 20% of Boston respondents don't see going out to indoor events until Jan. 2022 or thereafter
- Hybrid is here for another year

Summary: Focus on Strategic Communications
What does the research imply about communicating with patrons?

1. Empower audiences and visitors to make their own decisions about when they'll feel comfortable attending
2. Reference results about success with vaccination from the Audience Outlook Monitor study in blogs or newsletters
3. Provide information about health safety procedures in "layers," so people can access the level of detail they want (or none at all)
4. Acknowledge uncertainty about health safety measures – what is known, what is not known, and how you are navigating the uncertainties
5. Value patrons who are not ready to attend in-person, and continue to engage them in other ways (this will disproportionately include audiences of color)
6. Provide re-entry opportunities (e.g., dry-runs; video orientations)
7. Allow patrons to bail out if they don't feel comfortable (and get a refund)
8. Audiences are curious about artist safety and staff safety; communicating with them about this topic will build confidence

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Appendix Information

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About Audience Outlook Monitor

Led regionally by ArtsBoston and conducted by the international arts consulting firm WolfBrown, the Audience Outlook Monitor (AOM) is a longitudinal survey to keep tabs on arts attendees thoughts, concerns and intentions as the pandemic — and the state's reopening guidelines — evolve.

Phase II Massachusetts Organizational Cohort Members Include:

Actors' Shakespeare Project
American Repertory Theater
ArtsEmerson
Celebrity Series of Boston
Boston Symphony Orchestra (incl Tanglewood)
Central Square Theater
Boston Lyric Opera
Emerson Colonial Theatre
Global Arts Live
Handel + Haydn Society
Huntington Theatre Company
Lyric Stage Company of Boston
Peabody Essex Museum
Museum of Science

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WolfBrown 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

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Audience Outlook Monitor MA: Who is Responding?

All respondents of the AOM surveys reside in Massachusetts, are based on the 15 cohort organizations that are participating and are representative of the demographics that we see from the Audience Initiative community-wide database as a whole.

- 91% white / 9% BIPOC
- 38% are between the ages of 25-54
- 62% are older than 55
- Between 60-70% women

In looking closer at BIPOC segments from WolfBrown nationally, we know that:

- non-Asian BIPOC audiences have been more reluctant to take the vaccine
- Black and Latinx are more interested in digital content than audiences of other races or ethnicities