

7/28/21.

League of American Orchestras

This text is being provided in a realtime format. Communication Access Realtime Translation (CART) or captioning is provided in order to facilitate communication accessibility and may not be a totally verbatim record of the proceedings.

>> Hello, and welcome to our webinar, audience attitudes about returning to live concerts. I'm David Styers, the director of learning and leadership programs at the League, and thank you all for being with us today. We want to start by acknowledging our generous funders, made possible by grants by American Express, the Baisley Powell Elebash Fund, the Howard Gilman Foundation, and the National Endowment for the Arts, as well as in part by public funds from the New York City Department of Cultural Affairs in partnership with the city council. We appreciate their support of the League and the orchestra field.

A few quick technical notes: You notice that we are delivering this webinar through Zoom in response to members' technical difficulties assessing previous webinars this summer. Feel free to introduce yourself and make comments in the chat, but if you have questions, please ask them in the Q&A box, and

we will respond to them during and at the end of the webinar.

Also, everyone who has registered for today will receive an e-mail with the recording, the PowerPoint slides, and a transcript of the webinar in the next couple of days, and should you wish to follow along with the session via closed captioning, you can find the link for the closed captioning in the chat box on the right-hand side of your screen. Finally, at the end of the session, we would appreciate your completing the evaluation form, which you will find a link at the conclusion of the webinar.

And now it gives me great pleasure to introduce our host today, Alan Brown, principal of WolfBrown, Alan is the -- in the arts and cultural sector worldwide, and his board focuses on understanding consumer demand for cultural experiences and helping cultural institutions make informed decisions and respond to changing conditions. The League with the cohort of orchestras is -- partnering with Alan and colleagues on his Outlook monitor study, and we are excited to share recent findings with you all today.

Without further delay, I will turn our proceedings over to Alan, thank you so much again, for being with us today, add land.

>> Thanks, so much, David, for the warmup and introduction, and greetings to all of you. I'm Alan Brown of WolfBrown. I am coming to you from the great city of Detroit, Michigan, I apologize in advance for any Canine interruptions, their names are -- of

course, they are named after characters from Amahl and the Night Visitors. I'm sure they are sleeping hopefully through this entire webinar. But we have got a lot of information to share with you today.

But first, I want to introduce my fellow speakers today. Daniel and Siggi, could you come on camera? Daniel Grossman is vice president for marketing at the Nashville Symphony, and Siggi, you have a wonderful arcane title, senior director of research and design for the New World Symphony in Miami Beach. And maybe you can each share with us a little about your role. And if you could just start off by telling us kind of where each of your orchestras are with reopening. So, Daniel, why don't you lead off.

>> Thanks, Alan. Hi, everybody, I'm Dan Grossman, VP of marketing for the Nashville Symphony. And like many of you all, it's been a roller coaster of a year, 15 months, and counting, unfortunately. Here for our industry. I want to express my gratitude for all of you to be here today and for the hard work you are doing in each and every one of your communities to keep these amazing orchestras going every single day and into the future.

On June 30th, we suspended operations that was in 2020, and unfortunately, we had to furlough 131 people. And it was a slow crawl back to live from there. In January, we reached an

interim agreement with the musicians, broad them on a stipend, and for some service work. And then we were able to finalize a deal just this week with the musicians beginning August first. At this time, we have announced our 2022 season, that's very exciting. We have got over a hundred concerts up. And we are going to on single ticket sales on Friday. We have launched our season tickets. And our CYO's, and we have a little over 4.2 million in sales. Again, the goal, of a little over 11. We are happy with those results right now. A lot of that was retained, and rescheduled. But a lot of that is new money. And folks coming back as well.

And so, obviously, like many of you all, we went through a whole ticket option window when we were forced to cancel. And we had only a 16 percent refund. And 'we really attribute that to just respect, transparency, communication with the audience base, and educating them on our situation. And I just want to thank Alan, and all of WolfBrown in the Outlook audience monitor, we have been with them since the beginning of this project, and the information is invaluable to us being able to track people's propensity to return and around all the variables, live streaming, supporting us, keeping their tickets, donating their tickets, all that data, we were digesting. And on both the board and mostly the senior management level, we were using that to really help as one of the tools in our tool kit for making decisions along the way.

So I'm happy to be here and happy to answer any questions you might have going forward, thank you.

>> Thanks, Dan, and Siggi, could you introduce yourself and tell us a little about where the new world is with reopening?

>> Thank you, Alan, I'm very grateful to be here and thank you all for joining us in this webinar. My name is Siggi Bachmann, I'm the very director of research and design, as the title indicates, you I oversee research and design for the institution, and the great insights that we have found in this research have really helped us inform some of the decision making that we are now faced with. We are an academy and orchestra at the same time. We have students who come to us. There's a lot for us to think about in returning like everybody else.

>> When are you -- are you on sale now? Do you have --

>> Yeah, we have season -- we were very cautious when we started, because the data was indicating some reluctance, we went on renewals and then we slowly -- off to subscriptions and we are full on. We are going to play full orchestra, full house, and a lot of the safety precautions we have, you know, we have our own ideas based on the research data, what we want to do and what type of safety we want to provide our customers with.

But things change so fast in this environment right now, we want to go out as late as possible, to be as accurate as possible. If we say something right now, you know, next week, we might

have a changing situation where we will have to be -- but that's the plan on our end.

ALAN BROWN: On that note, if you have Web pages, where you communicate with your patrons about health safety and venue safety, post those links in the chat. I think it's helpful to everyone to see kind of what's being communicated at this moment in time, and feel free to copy those links and open them yourselves later.

All right. Well, I'm going to go ahead and run my presentation. I think it's going to take about 30 minutes. And again, please drop any questions you have in the Q&A, David will be monitoring that, and he can interrupt me and ask questions along the way.

But let me just share my presentation, and we will be on the way.

Okay. Fantastic. Well, this data goes only possible because we have a cohort of orchestras who opted in to, on a paid to play basis, to create a cohort of orchestras deploying the same survey to their patrons month after month. We have some orchestras deploying every month, other orchestras deploying every other month. But it's a really robust sample of orchestras across the country. These are some of the other cohorts that we have in the study. I won't be talking about their results today, but we do have a broad cross section of over 400 arts organizations

across the United States in the study at this time. The orchestra, as Daniel mentioned, Nashville, Cleveland, Philadelphia, and Oregon were a small cohort that started back in June of last year, and deployed -- actually, I think, Daniel, we were deploying every two weeks, surveys to get really amazing time series data, and we kind of moved to monthly. But the whole idea behind the study is a longitudinal tracking study. We are collecting data from similar cohorts of orchestras. They are e-mailing their patrons a random sample of their patrons each time they deploy the survey requesting cooperation with the survey. The patrons take the survey, the data goes into a dashboard interface and they are all to log in and see their patrons' data, and within the cohort, everyone could see each other's data, they are able to compare themselves to other orchestras they would like to benchmark themselves against or against the aggregate. It's really through the generosity of these orchestras that we are able to aggregate their data across all of these orchestras and allow League members to have basically unlimited access to the aggregated data, which is available to you in a dashboard, the log in instructions are -- David, at the end you can give everyone the link to that page. Those who want to get in the dashboard can.

But that's the basic methodology. The orchestra's last deployed two weeks ago, so the data I'm bringing you today is about 10 to 12 days old., in other words, very recent, and we have

been deploying monthly, so we have a really good picture of orchestra patrons over the last sort of seven months.

One of the leading indicators, we ask people the last two weeks, did you go out to a restaurant? And because we think it's an interesting benchmark, and potential leading indicator of willingness to go to concerts, to sit in a restaurant, and we are seeing high numbers that are out in restaurants, that's up to 76 percent on average, there's not a lot of variation there, it's ranges from 75 to 85 percent. But, it's quite consistent and has been going up since December, pretty reliably. That's kind of hopeful.

We -- however, we also asked people, have you been to a live performance in the last two weeks? And of course those percentages are quite low. And that's mostly because there's nothing on offer. But we have seen an uptick in, particularly in July, we saw an uptick from 12 percent to 20 percent, and I have to assume that's by virtue of summer offerings coming on-line and some people feeling comfortable going out to summer programs. So, we still have a long way to go between the 80 percent of people eating in restaurants and the 20 percent who are going out to live performances. But the trend is definitely going up.

So, as of July, this is one of our indicators we have been tracking since the beginning of the study where we ask people, is anyone in your household vulnerable outcome if they catch

COVID. This statistic sort of sat around 50 percent for most of last year, was quite reliable. And then the vaccine started rolling out in December, and it went down in February, and it's been going down, but in June, we were still at 32 percent of people saying they have this vulnerability, to a serious health outcome. Mind you, almost all of these people vaccinated now, and two percent say someone in my house is vulnerable and that reversed the 7 month trend, it's a reversal of fortune between June and July.

Moving on, this question is sort of like a yo-yo. We asked people, are infection rates decreasing or increasing. You can see last year when our whole country was going to hell in a hand basket, everyone knew when things were getting worse. Things started improving in December, and major improvement in the directionality of epidemiological situation. Big improvement for February and March. You may recall some states we had a surge in April. It was short lived. Things rebounded May, June, really strong belief things were getting better, and now in July, actually we are back to where we were in April. And it's anyone's guess whether things are going to get better quickly. I think that's pretty optimistic given what is happening right now. But our patrons are aware that things are getting worse. And again, this data was collected two weeks ago.

Let's move on to a couple of key indicators of vaccinations,

this is a happy story. We asked people on the survey, are you vaccinated, fully or partially then, and this story has been over, everyone that was going to get vaccinated was vaccinated. We are sitting at 95 percent. There's some regions in the national variation, I think the least I have seen in any organization was 85 percent. And we have some actual, actually quite a few organizations, at 98 percent or 99 percent, which is really astonishing. By and large, patrons did their part vaccinations effort, and I really want all of you to communicate this back to your patrons, that the cooperation of vaccination, was extraordinary. So, mostly we are dealing with vaccinated people and their concerns about going out right now. As you can imagine, the people who are not vaccinated are ready to go out, and that's been the case actually since last year.

So, we ask people who are vaccinated what is you're feeling about going out. The yellow bars in this chart, people are ready to go out now. That's up to 62 percent in July, which is really fantastic. That's fewer than are going out to restaurants, which is really interesting. I would love to kind of know the psychology of that. But most notably here, we are sitting at a third, really, 32 percent of all of our respondents who are 95 percent vaccinated, and this question is asked only of vaccinated people. 32 percent say I'm waiting. And that figure had been decreasing since February. But it's flat now. So, it was 32 percent last

month for the orchestra cohort, 32 percent in July. And that's a lot of people who are just saying I'm waiting, watching what's happening in my community, and as of right now, I'm not ready to go out again. And I just, generally want to say, it's becoming apparent. We have recovered like two thirds of demand, which is amazing, and hopefully reflected in your ticket sales. But this last third of demand, I think is going to be pretty difficult to claw back.

We have always had a core group of patrons who are just super cautious, quite skeptical for one reason or another, and there are many reasons, we will get into that. And just going to be very cautious. That's where we are sitting now in July.

I do want to point out some regional differences. I'm not, I'm sorry, I'm not able to share with you the names of individual orchestras, because that would sort of undermined their confidentiality. But I pulled out three orchestras who were in central states. And I pulled out four orchestras that were in coastal states, and you can let your imaginations run with that.

But I'm going to show results for these orchestras a couple of times, because the differences are quite marked. So, here you see the percentage of people who say I'm vaccinated but not ready to go out is sort of from the low of 20 percent to a high of 38 percent. And that's a big difference, that's almost a hundred percent difference.

So I -- so results are quite different in a number of indicators.

And you will see that in just another minute. So we asked people, why are you -- what are your concerns? One of the concerns were monitoring the concern that people's immunity, people don't know how long their immunity will last. There were new stories several weeks ago, I think Pfizer came out and said it's time for a booster shot, CDD said not so fast, I think there was a story today suggesting that people get a third dose have amazing protection against variants, this is a very live situation, and there is some confusion about how long immunity will last. I do think this comes into play as regards to subscriptions where people are buying tickets for concerts that are a year away, and they have no idea if they will need a booster shot, if they won't, and when their immunity is potentially diminished.

>> Alan, can you ask you just to clarify, respondents and the data, are there audience and patrons or -- just as part of the orchestra?

>> They are ticket buyers from, some activity in the last two to two and a half years.

>> Is there any difference in demand, or are you tracking between classical and pops patrons?

>> We are not distinguishing between product lines, it's a random cross section, but we do have results for subscribers versus non-subscribers, but I'm not showing that today.

Okay?

>> Thanks, Alan.

>> Great. So, we are looking at concerns of the people who are vaccinated and not yet ready to go out. Some are concerned about transmitting the virus themselves. This reversed a little bit in July, it was getting much less of a concern, and now it's sort of gone up. There have been, again, some news stories, I mean, the media is inundated with stories about the trans -- about the Delta variant, I think there was a story about vaccinated people being con -- being able to shed the virus and more of it than other variants, again, this is fluid. But these stories, these issues are in the media now, pretty much constantly, depending on what media you consume. And then also just people saying they are vulnerable to a break through infection, that actually went up a bit, concern about that went up a bit. That will be very interesting to watch. We are trying to get at what are people concerned about who are vaccinated, but not yet ready to go out just so we can understand what their concerns are.

We have sort of --

>> Alan, one other question, the sample size, what's the average number per orchestra or the N equals for this?

>> The N's in this -- are visible just below the chart. So that, where it says on the right here, for example, N equals 1479, that means 1479 people answered this question. And that's across, depends on the month, but it's across usually eight to 10

orchestras.

So, it's a cross sectional orchestras, they are sending the people a different survey every month, we are not going back to the same people, we are asking different random samples. But because they are randomized, they are comparable.

>> And this is a mix of any ticket buyers, whether it was in-person or on-line?

>> We were sampling in-person. Okay. So, here we are just looking the confident levels in people's protection levels, most people are confident that will allow them to resume normal activities. But not everyone is at the highest level here. Very confident people have qualified confidence, and I think you are just seeing some shifting here, you know. I think what is happening now is, the liberation of being vaccinated and all the protection that affords you, I think we kind of -- we were so relieved after being vaccinated, now, people are realizing there are limitations to our protection, I think that's a hard corner to turn psychologically. And I think that's what's happening now. At least amongst other patrons, let me run through a couple of key indicators about -- of demand. We asked if how comfortable people would feel about -- this is a large concert or -- hall, you see -- comfortable level was quite low, and began going up in February, peaked at sort of 1.2 on a scale of two, and declined just a bit in July. In fact, these are all the seven venue types we

surveyed. Outdoor venues, people have been more comfortable all along. But in July, actually comfort levels with all of these venue types just went down a bit and really reversed the trend of going up.

So, I don't think that's a surprise to anyone given what is happening, but that's what it looks like in the data. So the big question, are you ready to go out this week to an indoor cultural event? We give people three -- four choices, no, and right knew, 85 percent of people say I'm ready to go out now. But they could answer under any circumstances, yes, I would go out, but with masks, and yes, I would go out with both masks and distancing. And as you can see, among the people that 85 percent who are ready to go out, just a little more than half of them say but with masks, or masks and distancing. 40 percent are ready to go out under any conditions. So, really we have very different feelings within the audience about what is appropriate level of safety precautions. But that's where we are sitting as of right now. Fortunately since June, the percentage of people saying they would go out under any circumstances did go up. I want to just cross tab this or filter it by whether or not people said they had vulnerability in their household, remember sitting at 34 percent right now? When you look at the results of, are you ready to go out this week, people who feel they have a household vulnerability are just half as likely to say they are ready to go out

under any circumstances right now, than people who don't have this vulnerability in their household.

So, really, the driver of caution here, and this has been true for months and months, is people saying I have a vulnerability in my household, that could mean -- vulnerability due to age or pre-existing medical condition or having unvaccinated household members or they maybe caregiving to someone who is unvaccinated or at risk, a lot of reasons for that.

>> Alan, do you have any demographics on the people responding, such as their age?

>> Yes, yes, we have all of that and I'm not showing any of that today. But in the dashboard, which everyone on this webinar can access, you will see demographic results, and you can look at age and gender and other ethnicity, race, ethnicity, and others.

Again, when we look at the central state orchestras and the coastal orchestras, just very different places in terms of readiness to go out, her percentages say they are ready to go out now under any circumstance, but in the coastal orchestras, sometimes half the readiness. And you can ascribe that to a number of factors, I'm purposefully avoiding commenting on the political dynamics of this, we did not ask people about their political beliefs, because I knew it would be a huge distraction, there's nothing we would do with that information. But they are, you

know, cursory level, there would appear to be kind of a red state/blue state dynamic here in the data. And then the calendar, we asked people when do you think you will be going out again. We gave them the full line up of months. And on the top, the orange bars here are people say I'm not going to out until January of next year or later. And you will see in July, that figure actually went up three percentage points from 13 to 16 percent of folks saying right now, in July, I ain't going out until January or later.

And then other people saying I'm coming back October, September. Most people September.

So we are really, as we move through time and the options change here, you will actually see the actual behavior is what people said they would do: People who thought they would be going out by June were going out by June. This seems to be a pretty reliable indicator. As time goes on, we will see how to reconcile with the 32 percent of folks saying they are not ready to go out yet and see how it squares with this. But I think you can pretty much take this to the bank with sales projections, there's going to be a group of anywhere from 15 to 20 or 25 percent of folks who are just not ready to enter the marketplace until January or later, especially with what's happening now.

A deep dive, I will go quickly through this. We changed our questioning when the CDC changed their guidance, and we knew that this issue of vaccine only admittance will come up. We were

aware that in 16 states, this is illegal, it's been outlawed by state's governments, and they have very different sets of rules.

We asked questions about prerequisites and deal breakers. Prerequisites are conditions that people say must be met before they go out. Here you see results for June and July. The lowest, the green bars at the bottom, these are percentages of people who say I won't go out unless masks are required. 44 percent in June, that went down significantly in July to 34 percent.

So, if you believe this, it means a third of your folks aren't going out unless masks are required.

We also saw, there's other items in here, I won't go over about intermissions, food and beverage offerings, generally they are lower. The other large item here is people who went go out unless proof of vaccine is required. That was 32 percent in June, and it's 30 percent in July, as of several weeks ago.

Now, this was just a list of things people could take a box, saying what your prerequisites, I don't know if we actually hold their fingers to the fire, if their behavior would follow this. But we are just looking at 36 percent did not answer the question or had no prerequisites, but quite a few people have these prerequisites for going out. We need to bear this in mind.

Here is is two orchestras, just the orchestras in central states just had lower prerequisites, way lower for proof of vaccine, and

you look at the coastal area and these figures are much higher, dramatically higher. That's just another example of regional variations, these are deal breakers, conditions that people say if they are required, I won't go out. So, it is the flip side of the coin from prerequisites. So, here we see that on average, in July, 13 percent said if you require masks, I won't go out. And remember, we just looked at this, where 34 percent said I won't go out unless you request masks.

So, by and large, way more people are saying, are favoring these policies, but there is an I element of, in the audience of people who are opposed to them. That's why I think -- getting this data in front of your senior management, there are people who disagree on very important things right now, that's why this is such a critical moment for the whole orchestra field in terms of communication, trust, transparency, because some people are going to be unhappy with any decision you make.

And again, here, the vaccine, proof of vaccine figure is 14 percent, if you have that policy, they won't come. And that compares to the 30 percent who say they won't come unless you have that policy.

So, as with deal breakers, big differences between the coastal orchestras and the center state orchestras. On the coastal, fewer deal breakers in general, but patrons in the central state orchestras were just way more opposed to these measures.

And we have open ended comments that would curl your hair if you had any, about just how opposed they are to some of these policies. Digging deeper into proof of vaccine, and I will wrap up here in just a couple minutes. We asked people how would this affect your likelihoods of attending, more likely, less likely, and on average, they are substantially more favorable about vaccine admittance policies. We realized we asked this in states that were legal, but we thought orchestras would want to know anyway how their patrons feel about it.

But we have a very vocal minority of people saying I would be less likely to attend, but let's not lose sight of the big picture here, strong favor ability. Between the central state orchestras, you just look at the red bars on the bottom here, more people are opposed in the central state orchestras than the other orchestras.

Open ends, I love surveying arts patrons because they write in full sentences and lengthy responses to open ended questions. Your patrons are amazingly helpful in taking the survey. I mean, I can't tell you collectively what a monumental effort this is to provide the field with all this data. It's what you would expect, why people support vaccine only admittance. People just believing it is what they need to do, it makes it less stressful experience. The irony of this is that 95 percent of people are vaccinated or higher, in many areas.

But people are very clear on why that policy would work for

them, and then people are equally vociferous about why they object to it. And yes, even in our data, we have some COVID deniers. And it's all there in black and white for those orchestras who survey their patrons.

Just -- I didn't want to gloss over digital -- it's been a focus of the research, really, since last summer. We went very deep into patron attitudes about watching digital content at home. We asked them questions about sort of how they are set up at home, are they watching on a computer or a TV, and how comfortable they are. We went pretty deep into in. Persevering with a couple of indicators, we asked did you watch and pay or did you watch for free digital content or did you not watch? And this data is not really moving much, even as we come out into reopening, we are still seeing exactly half of all of our respondents say they are engaging with digital content and half of those people say they are paying for it.

And then we asked a forward looking question, did you imagine that digital programs will play a role in your life, a substantial or a small role after you are able to come back to in-person concerts or performances, and a majority of all respondents are saying that digital content will play at least a small role -- small percentage say a significant role, but 31 percent are saying no role at all. So, David, this is a whole other webinar. This is such a rich topic at this very moment in

our field, sorting out what are our strategies for engaging people with digital moving forward --

>> Did you specify whether they were watching local or any --

>> It's any digital. And we actually did a 20 in-depth interviews about sort of their experience with digital content, and we will be posting a report on the audience Outlook monitor site about those interviews, but, you know, you can't just look at digital in a silo with one organization, you have to look at people's sort of total experience. We are really in the wild west of digital programming, people are just learning, overwhelmed with choices. There's so much opportunity, I think, to do audience development work through digital programming, but I think that's going to require a level have collaboration in the field, frankly, with leadership from the League, to really make wise investments in digital programming that all orchestras in the country can use. So, so many issues there, maybe we will have a chance to get into more of that later.

But just to wrap up, you have seen the take-aways, the big picture here was one of amazing progress. The progress with vaccine is so incredible. Again, I do encourage you to share that information somehow with your patrons, that this very large percentage of them, according to research, are vaccinated. And hopefully that will kind of lower temperatures of everyone, and just help people gain a little comfort.

So, 85 percent of folks are ready to go out, but they disagree on the conditions. We are going to have to sort that out over the coming months, this is a pivotal time, awkward time where we have this disagreement over what conditions are appropriate, and we are going to have to -- you know, the bottom line here is, those of you who are able to do vaccine only admittance, I would recommend you seriously consider it. I understand how difficult that could be to implement, but if you are able to give people a choice of open attend dense on one night and open so vaccine on another night --

>> Do you have any guidance about the musicians or the staff --

>> Yeah, that's an invitation to stick my finger in a hornet's nest, I think. All I can say is that audience members are very interested in artist safety in general. So, I think they want to know what your policies are with both musicians and staff. And the way you treat your artists will say a lot about their confidence, their own confidence in going, but I'm not really, David, able to comment on, you know, best practices. I think there may be union issues that I'm unaware of. But the one thing I will just say, masks, I have studied the intrinsic -- over the past 0 years and the way they convey is through facial expression and the way we absorb other audience members' experience is by watching their faces. And when you are wearing a mask, it's like a wet blanket

on impact. It's deeply problematic in that. It's not possible to have the same impact at a performance where audience members or musicians, really, are wearing masks. You are masking impact. And that's a deeply, for me, a deep trade-off to make., is to cover up faces, because it really impedes the experience, the emotional experience. And it may be something that we are willing to do on a temporary basis just to get back in the concert hall. So, anyway, that's my presentation for now. And I do want to open it up now, ask Daniel and Siggi to come back. And David, let's sort through a couple of questions and comments.

>> There are still questions about -- did you ask a question about do fellow audience members believe that others might be lying about their vaccinate status?

>> Lack of trust in other audience members is one of the main factors driving hesitancy to go out.

>> .

>> And significant and Dan, how does this information inform the decisions you are making, particularly as you are looking to your 2021-22 seasons?

>> Well, you know, it's been interesting to see how it evolves in going on, especially now with the latest deployment, the July deployment, to see a little bit of a backtracking.

And it's been an exercise in want watching the data and

looking at and figuring out how do we deal with this. I think the trust factor is going to be huge, and communicating with audiences, they trust us as an institution, I think that's generally how they feel, but most orchestras and arts institutions, but the trust between themselves, between the audience members is not that high, because they don't have experience of each other, necessarily, like they have with us.

So that's something that, I'm not sure if we can change how they experience each other. But we can at least make them feel safe, that they feel really safe right off the bat, right when they walk in, and they see that they are being taken care of, and the orchestra and the institution is thinking about their well-being inside the hall and as they come.

>> I would just add that I think the data helps in reading the landscape of our audience perception, and for us, it's very polarized here in Nashville.

And, but what it does, it gives us license to be transparent with our audience about our right to be fluid with these decisions. And because perception does change along the way, and because people have varying viewpoints about what we should be doing and what they should be doing, I think we have to have a commitment to fluidity and flexibility. I think obviously a lot of these safety protocols are rather easy to implement, social distancing being the toughest. Once you decide to go full

capacity, they are looking at postponement or cancellation or a ticketing debacle is what I like to call it. I think you have to be really careful there. What we did, by looking at the data and understanding the needs of our orchestra, is we tried to kind of front load our season with stuff that we could socially distance, and in the beginning we had a whole -- in the beginning of our reopening, we had a whole phased reopening where we were going to have tighter capacity limits and open them up as time went on. We went to full capacity, but it gives us some flexibility now to make changes backward and not have such a huge impact. And so that's really great. But I would say that, yeah, our commitment to just keep looking at the data and allowing ourselves to be flexible and fluid and making sure that we are just transparent with folks, I do like what Siggi said before, or perhaps it was on another call that I had, but what I wanted to say was, we don't want to over communicate. We want to let things play out a little bit and make sure we are communicating the right information at the right time.

We are not opening our seasons until September, right? And unless we have summer seasons that might be outdoors which is a different scenario. But we don't have to communicate every day, or right now, we have to make sure we have the right structure in place to communicate at the right time.

>> For a lot of this, it will somewhat depend from community

to community, as Alan's data has shown, the coast versus central, very different, almost countries, but Dan and Siggi, what are you communicating about the musicians in terms of, will they be wearing masks? Are they going to be a hundred percent vaccinated and are you communicating that to your audiences?

>> We have not yet communicated that, but leaning towards everybody being vaccinated in the orchestra. We are not -- we are in Florida, so, it's really tricky for us to do this. And you know, I'm not so involved in those decision making, but I think we are leaning towards that right now.

>> Just to piggyback on what Siggi is saying, the communication to our audience is that we are putting the musician safety in our highest priority. We also work with the health and safety partner, which is a local healthcare company, HCA. We mentioned that as well, that we are talking a lot with HCA about the changing landscape. And we have a very high commitment to the safety of our audience, and the artists, and our staff. We are not getting into the details around mandatory vaccinations, we haven't set those protocols here. But we will continue to be committed to their safety. It's just finding the right way to communicate that to our audience. I think not getting into a ton of details around that might be a better way to go for us right now.

>> Great, we have about five minutes left. Alan, Dan, Siggi,

anything you would want to leave our audience with, that they should be thinking about or things they may not have encountered yet but planning for the next season?

>> Can I add something to what Dan said? I think flexibility, especially in augmenting digital -- into your programming, we don't know what's going to happen, how bad or good it's going to be, but having had the practice of doing -- and performances, I think it's not just a -- extension, but something that some people have to fall back on, in some cases.

>> Yeah, I -- I second that. We have always known all along there's going to be a segment of audience members who are just very slow at coming back. And now that's coming to fruition, and we are starting to see. And it's possible over the coming weeks and couple months that that pool of people will grow. I mean, there's a comment here in the chat, Lexington, Massachusetts, you are having people withdraw from their subscriptions. I mean, I hate to say it, but Siggi, you are opening into a surge. And that's what's happening now in some cities more than others, but the Delta variant is slowly spreading across the country and it's probable or likely that midwestern cities will be hit. Not yet, they haven't. But it's here. Even western states. So, I just want us to be prepared, as prepared as we can be. And not be, I think the tendency is to celebrate, oh, my God, we are open, come back, we are so happy and we kind of send the message that we

really value the people who are coming back, but there's one message I would say to you, is figuring out how to value people who are not yet ready to come back, is absolutely critical in the long term, I think, to our survival. Because if those people just disappear into the great unwashed pool of lapsed buyers, I think we are really missing the boat. Because many of those people are our most fervent supporters, so, continuing offering digital and realizing this is going to go on longer than anticipate.

>> First of all, I want to thank you, Alan, for having me today and David, and also just to be a part of the audience Outlook monitor has been invaluable. I would just encourage all the orchestras, if you are not doing it, to survey your audiences, around their perceptions of everything, and continue to do it. I know there were thoughts about how we pooled our audience, we took three years of buyers and donors and taking 7,000 of them and sending them a deployment of the survey, so we are not over surveying people, but we are getting random, really quality random sampling out of it every time. And I would just say that making sure you are talking with your audience and listening to them, and incorporating that into how you are communicating, and what decisions you are making, is just the one take-away I would say here, is just trust in their viewpoints. And let it help you through this crisis.

ALAN BROWN: Thanks, Daniel, and David, before I hand it

back to you, I want to thank the League for entering quickly into a partnership that made this possible. This is a new model for market research, where, at relatively low cost, individual organizations opt into a study and we make the data available at no cost to the field. I'm absolutely committed to making professional quality market research available to smaller organizations, organization that normally don't have access to research for the betterment of the whole field. Thanks to the legal and also note that there are no foundation funders involved in this research, it's all self-funded by the orchestra. So, David, back over to you to wrap up.

>> Thank you so much, Alan, for your leadership in this with WolfBrown and again all the organizations' participation and for Dan and Siggi being with us today. This has been very thoughtful. The take-away I would leave you with is to listen as you are doing surveying and getting information, particularly from all your stakeholders, audiences, volunteers, staff, musicians, your boards. Data is powerful when you don't know what they are potentially thinking; it will help you in your decision making. Before we depart, I will just remind everyone, if you registered for today's event, you will receive an e-mail with the recording, the PowerPoint slides, and the transcript of this webinar soon. Again, please go to the Outlook monitor page on our website for more information. Again, you can access this data as well.

Also, again, we would appreciate you completing the evaluation form, the link that I just put in the chat. And we are lining up many webinars in the future. Our next one will be in one month, Wednesday, August 25, 3 p.m. Eastern. The advisory board for the arts will be doing a webinar, redefining the donor value proposition with new data that they have collected in looking at donors to the arts. Thank you all, again, for joining us today, and have a wonderful rest of the week. Bye-bye.

>> Bye, everyone.