



# League of American Orchestras Membership Briefing July 28, 2021

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New World Symphony

# 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)
- **National orchestra cohort (League of American Orchestras)** **Monthly (Feb.)**
- 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)
- 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



# National Orchestra Cohort, 2020-21

## Phase 1 Cohort Members (2020)

- Philadelphia Orchestra
- Cleveland Orchestra
- Nashville Symphony
- Oregon Symphony

## Phase 2 Add'l Members (2021)

- New World Symphony
- San Diego Symphony
- San Francisco Symphony\*
- LA Phil/Walt Disney Concert Hall
- Tucson Symphony
- Omaha Symphony
- Madison Symphony Orchestra
- Pacific Symphony
- North Carolina Symphony
- New York Philharmonic\*
- Detroit Symphony Orchestra\*

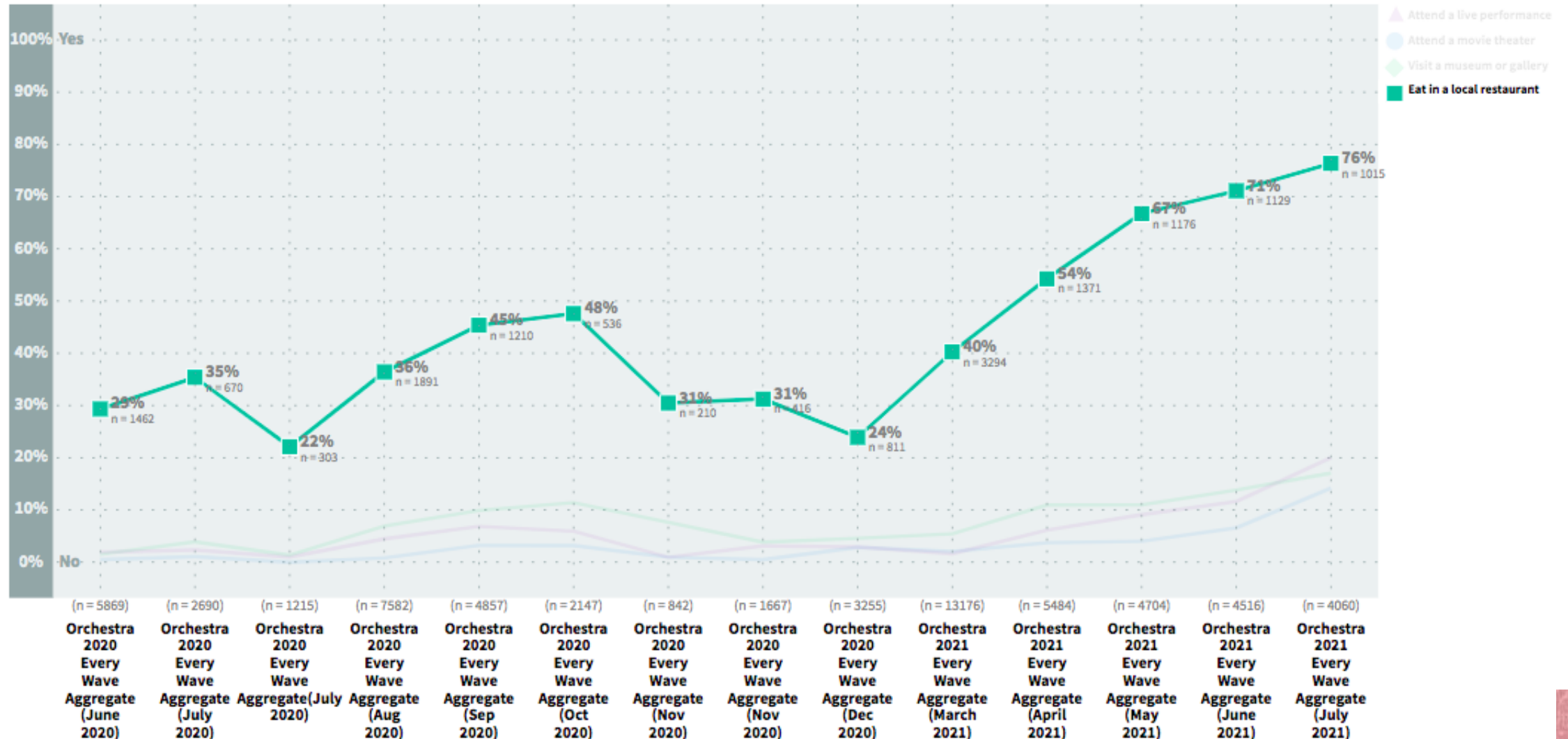
**AUDIENCE  
OUTLOOK  
MONITOR**

**Key Indicators of Demand:  
Data collected July 13-16**

# Roughly 75% to 80% of respondents are eating at local restaurants - a leading indicator of demand for concerts?

In the past two weeks, did you do any of the following activities in-person (not online)?

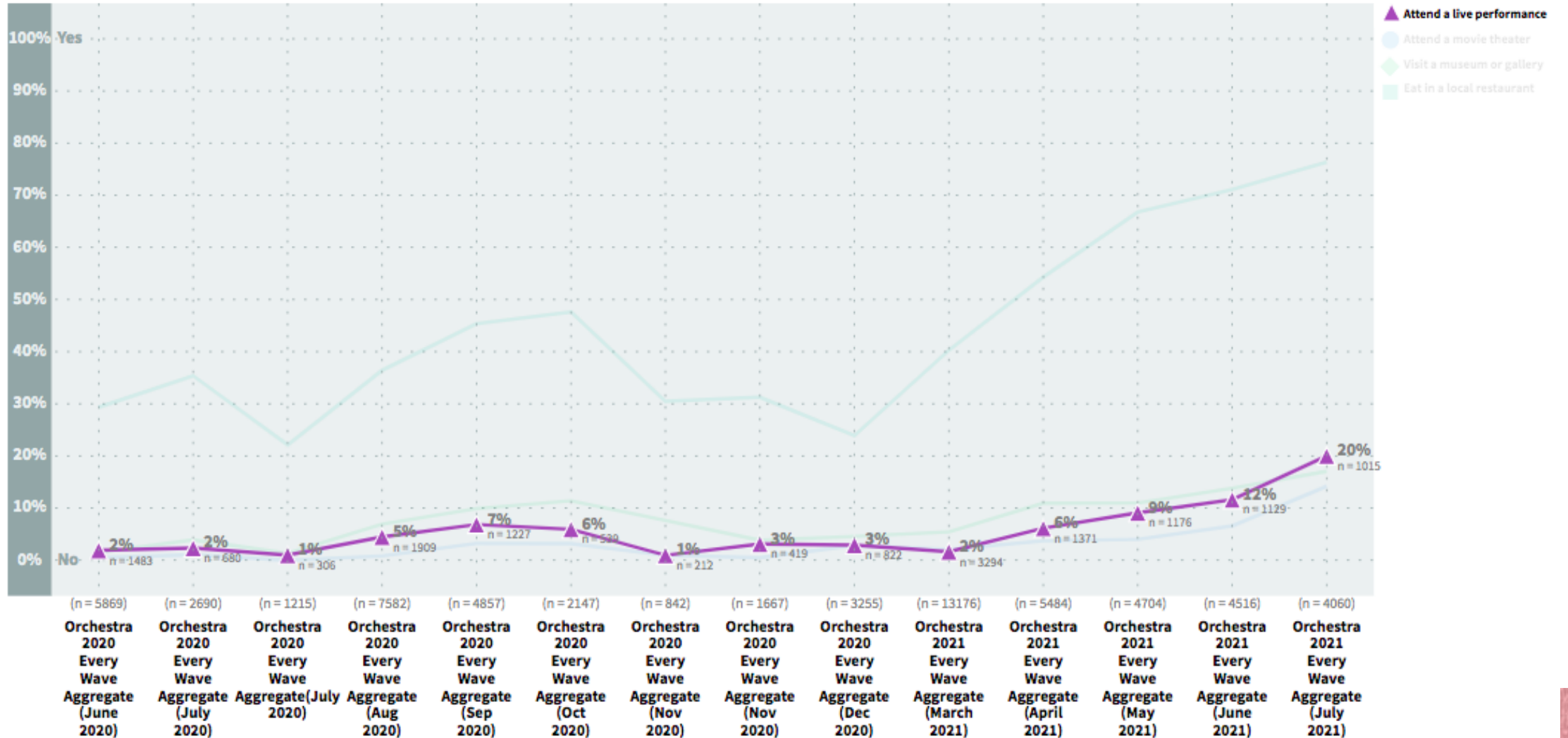
(Using data from the previous question, this chart shows the percentage of respondents who chose options that were also asked in protocols 1-4)



# Incidence of attending “a live performance” moved from 12% in June to 20% in July, a reflection of uptake on summer program offerings

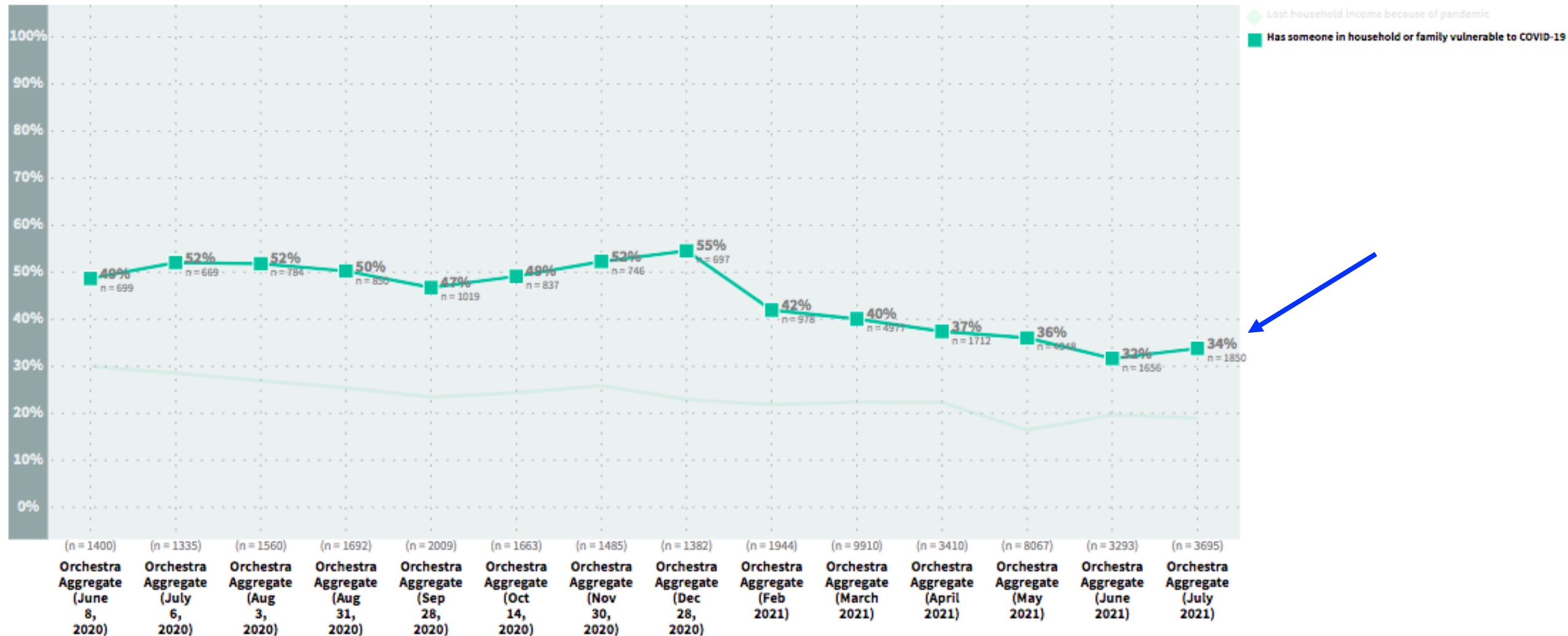
In the past two weeks, did you do any of the following activities in-person (not online)?

(Using data from the previous question, this chart shows the percentage of respondents who chose options that were also asked in protocols 1-4)



# As of mid-July, 34% of respondents in the Nat'l Orchestra Cohort report a household vulnerability to Covid-19, a reversal of the downward trend we've seen since December

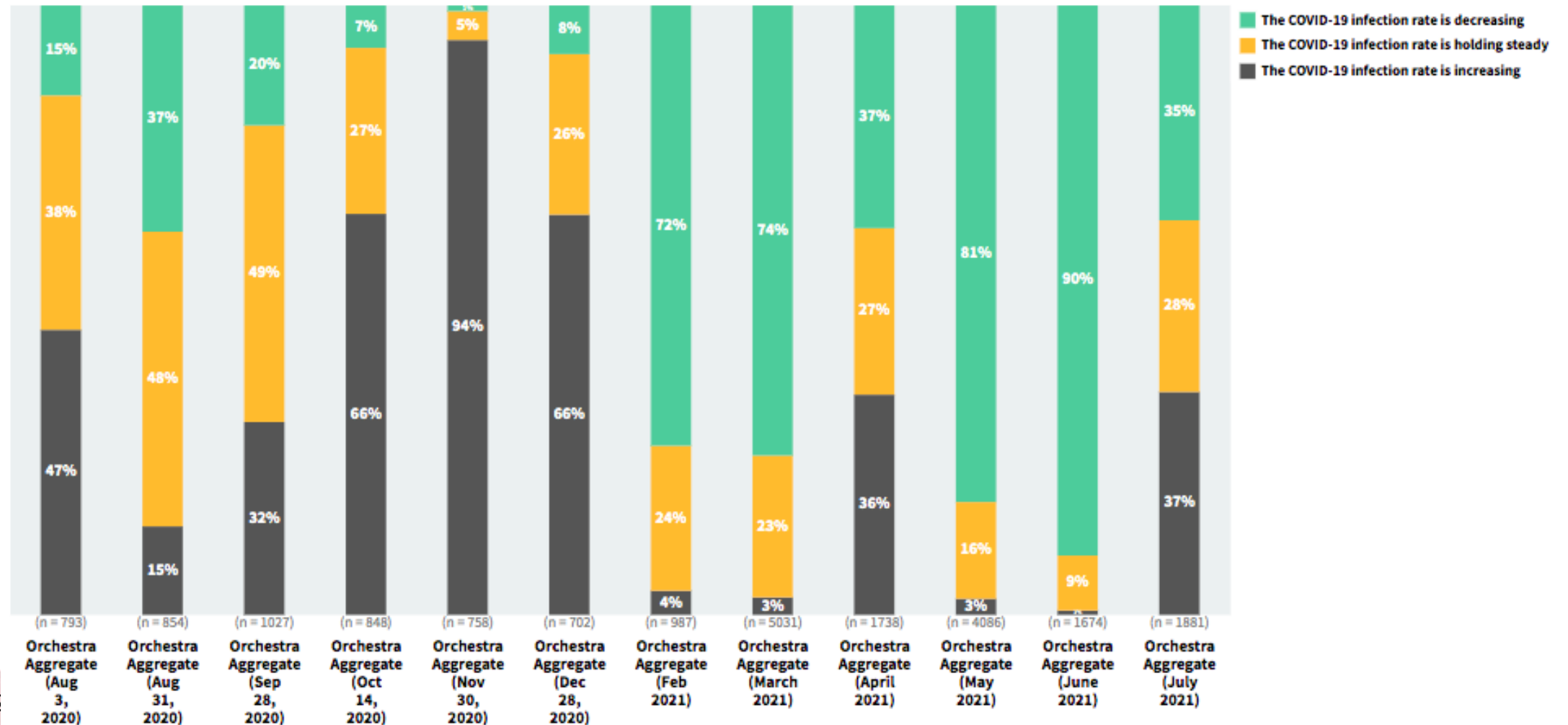
COVID-19 Impact  
(Also on protocols 1-4)



# Perceptions of infection rates worsened significantly in July, as would be expected given media focus on variants and breakthrough infections

To the best of your knowledge, which one of the following statements best describes the current conditions in your region?

(Also on protocols 2-4)





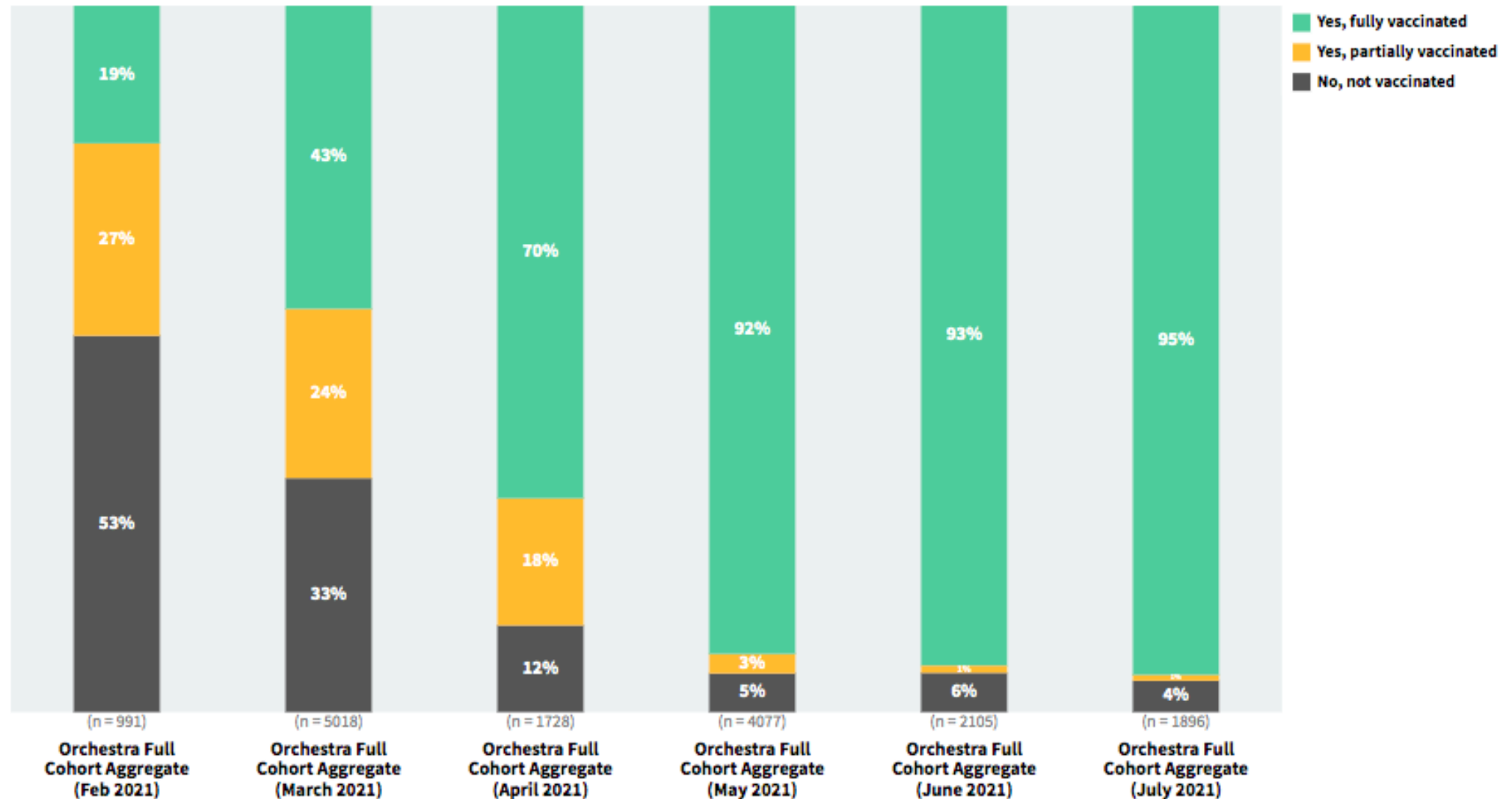
**AUDIENCE  
OUTLOOK  
MONITOR**

# Progress with Vaccination

# The last word on vaccination: 95%, on average (within the cohort the figure ranges from 90% to 98%)

Have you been vaccinated?

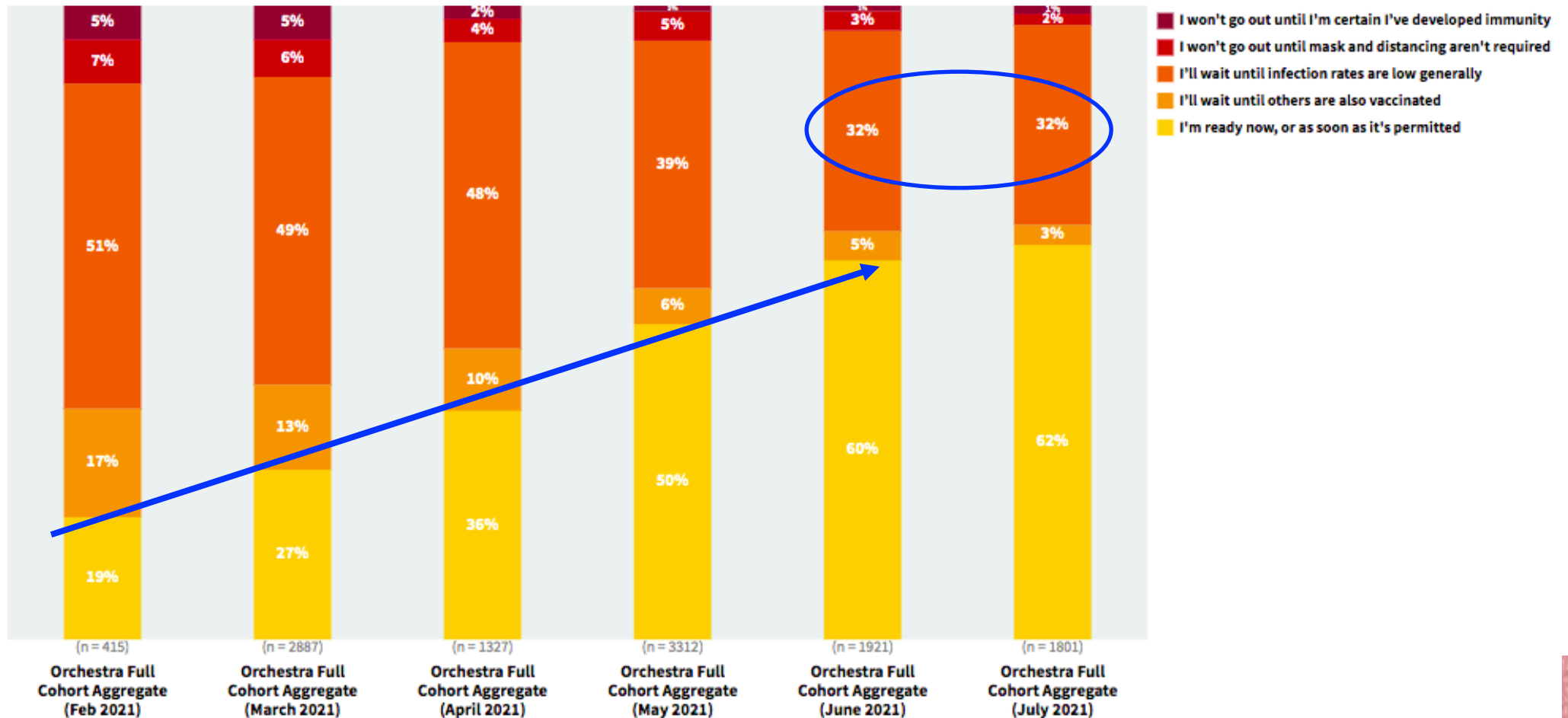
(Asked of all respondents. Also on protocol 4.)



# When will vaccinated folks be ready to go out again? A third are waiting for conditions to improve; no movement from June to July

Vaccinated: Now that you've been vaccinated, which statement best reflects how you feel about going out to cultural events?

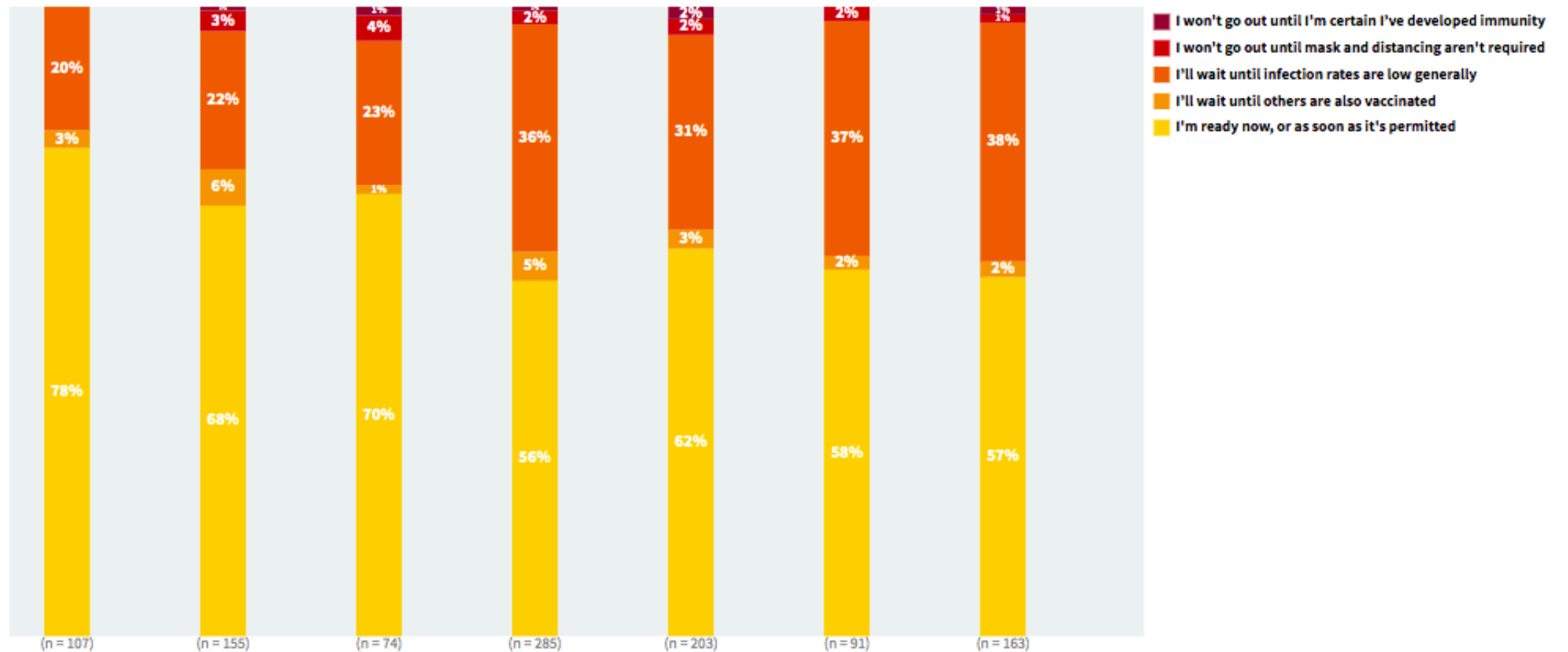
(Asked of respondents who indicated that they've been vaccinated. Bear in mind that those with access to vaccines for the first few waves are the respondents with the highest risk. Also on protocol 4.)



# Significant regional variations are observed: audiences for orchestras located in central states are less concerned generally

Vaccinated: Now that you've been vaccinated, which statement best reflects how you feel about going out to cultural events?

(Asked of respondents who indicated that they've been vaccinated. Bear in mind that those with access to vaccines for the first few waves are the respondents with the highest risk. Also on protocol 4.)



Central State Orchestras

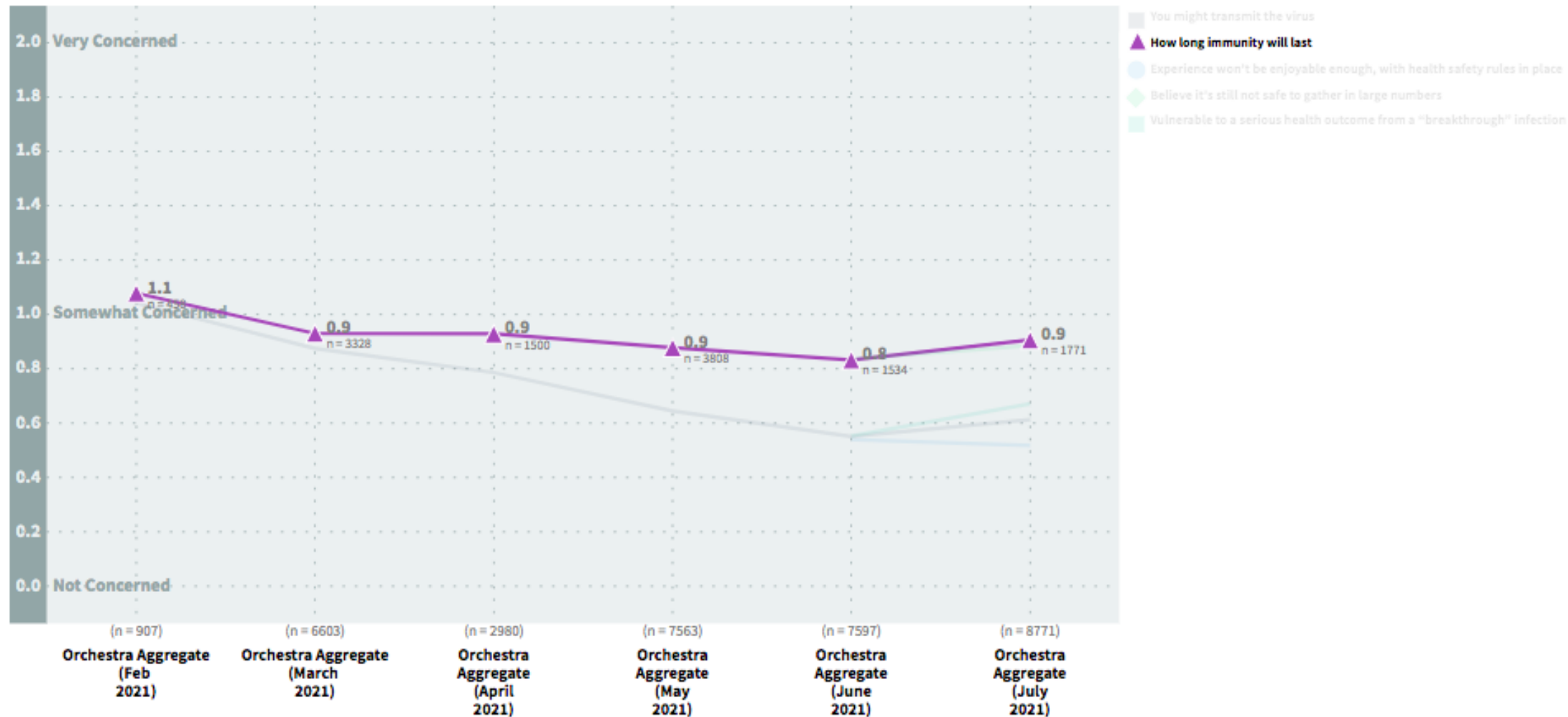
Coastal Orchestras

# What are they concerned about?

## Persistent concerns over how long immunity will last

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

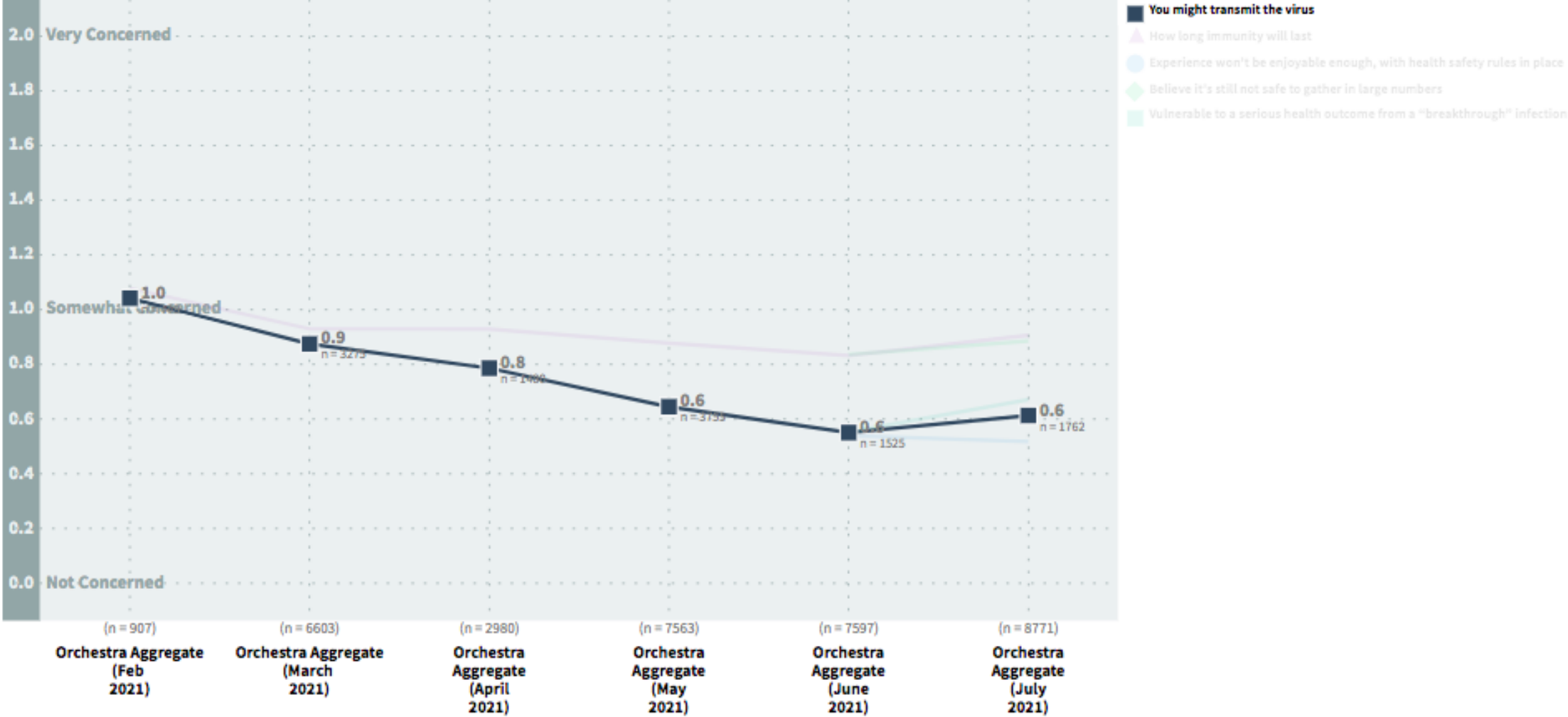
(The options "You might transmit the virus" and "How long immunity will last" were also on protocol 4)



# Concern that one might transmit the virus, even after being vaccinated, declined since Feb., but rose in July

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

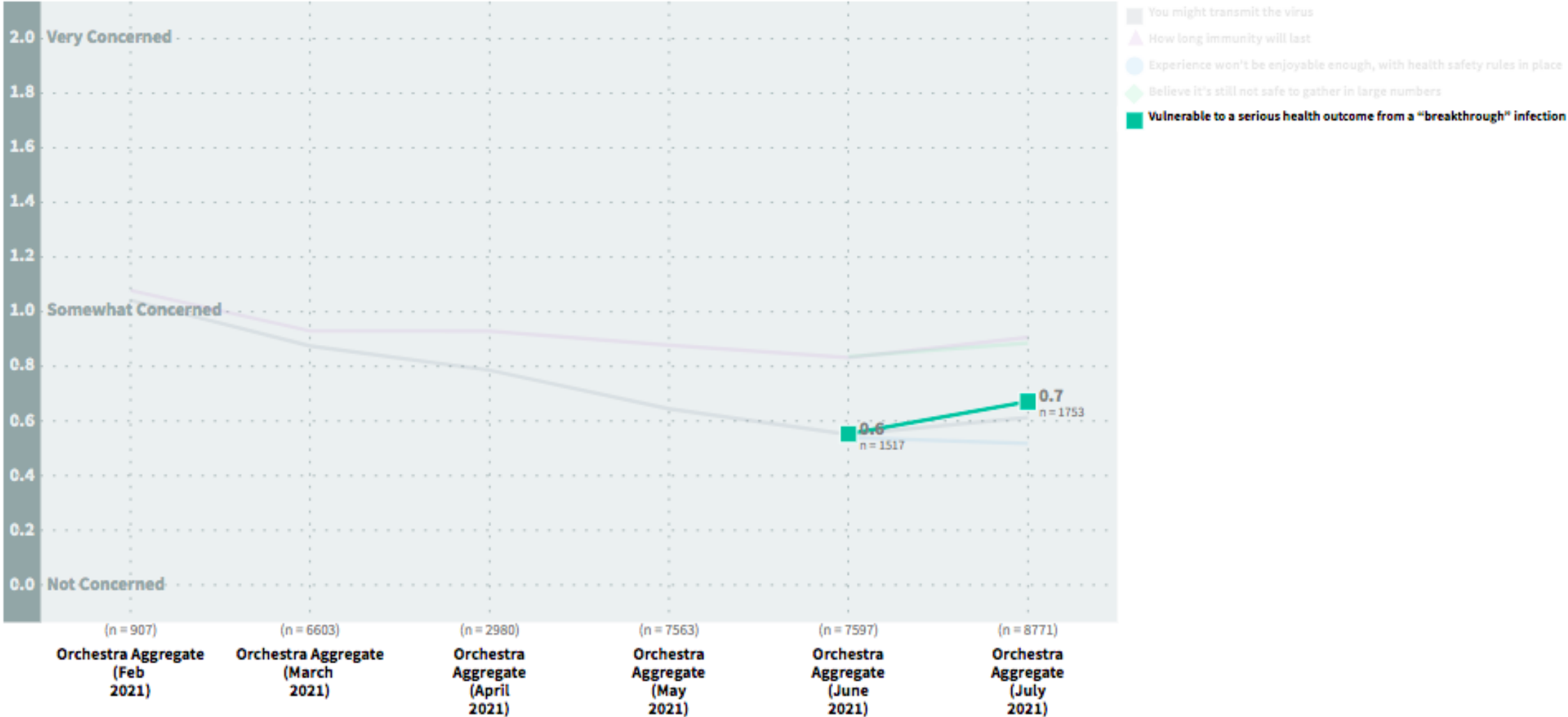
(The options "You might transmit the virus" and "How long immunity will last" were also on protocol 4)



# ...So did concern over vulnerability to a breakthrough infection

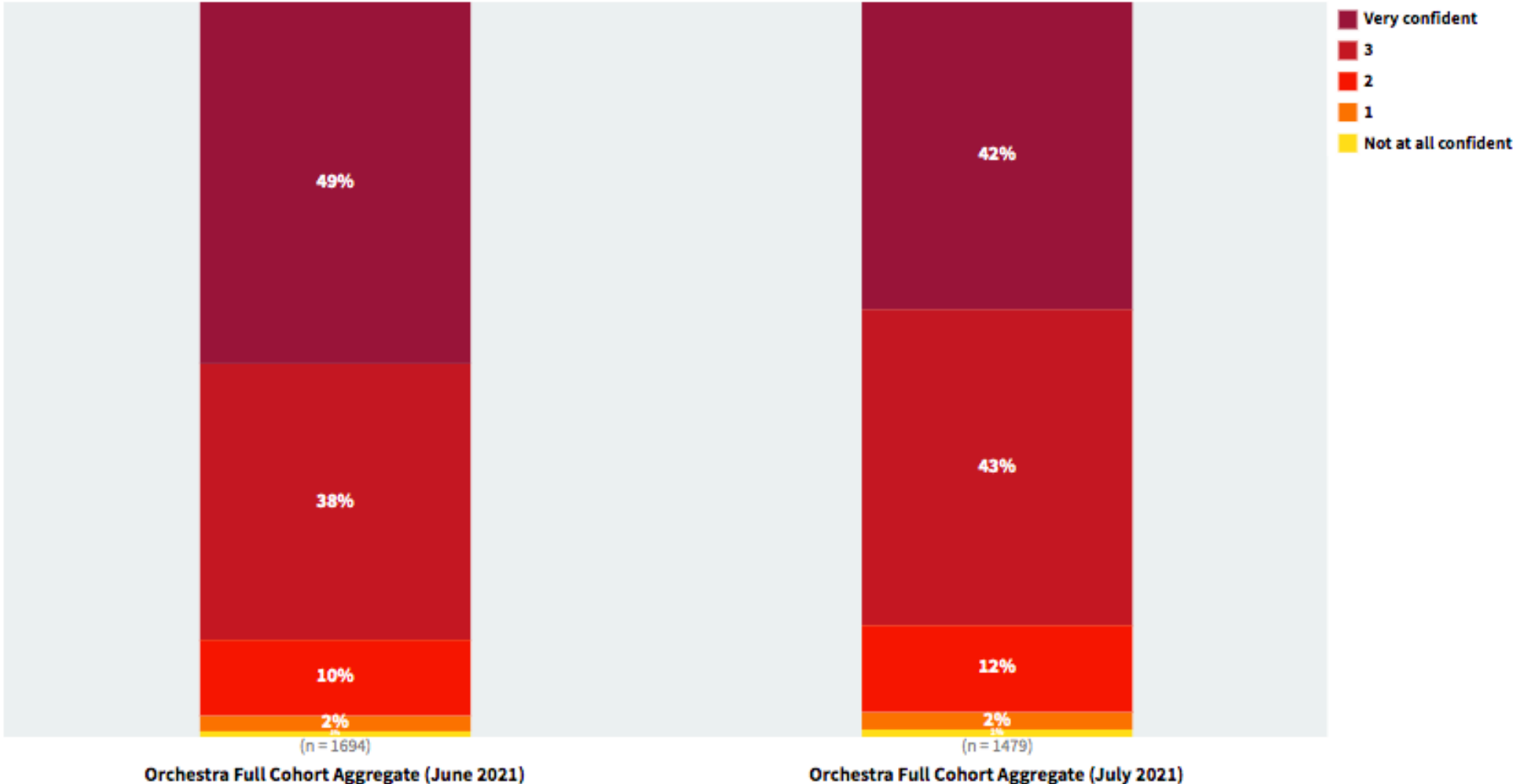
Vaccinated: Do any of the following concerns figure in your thinking about going out to cultural events, now that you're vaccinated?

(The options "You might transmit the virus" and "How long immunity will last" were also on protocol 4)



# Overall, vaccinated respondents' level of confidence in their protection from Covid-19 declined in July, but is still high overall

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





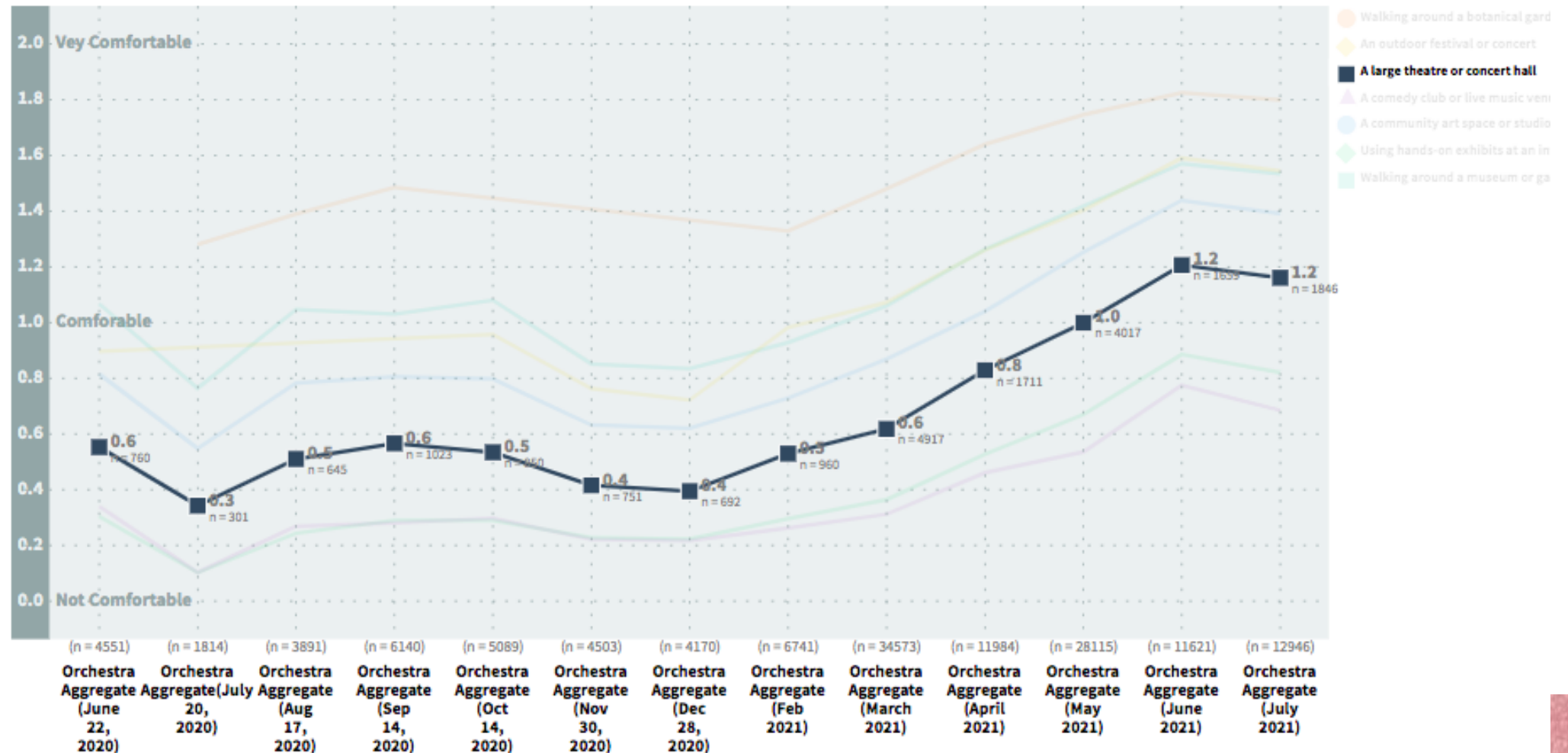
**AUDIENCE  
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# Resumption of Demand for Live Concerts

# The strong upward trend in level of comfort attending “a large theatre or concert hall” stopped in July, and actually regressed a bit...

How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following local health guidelines?

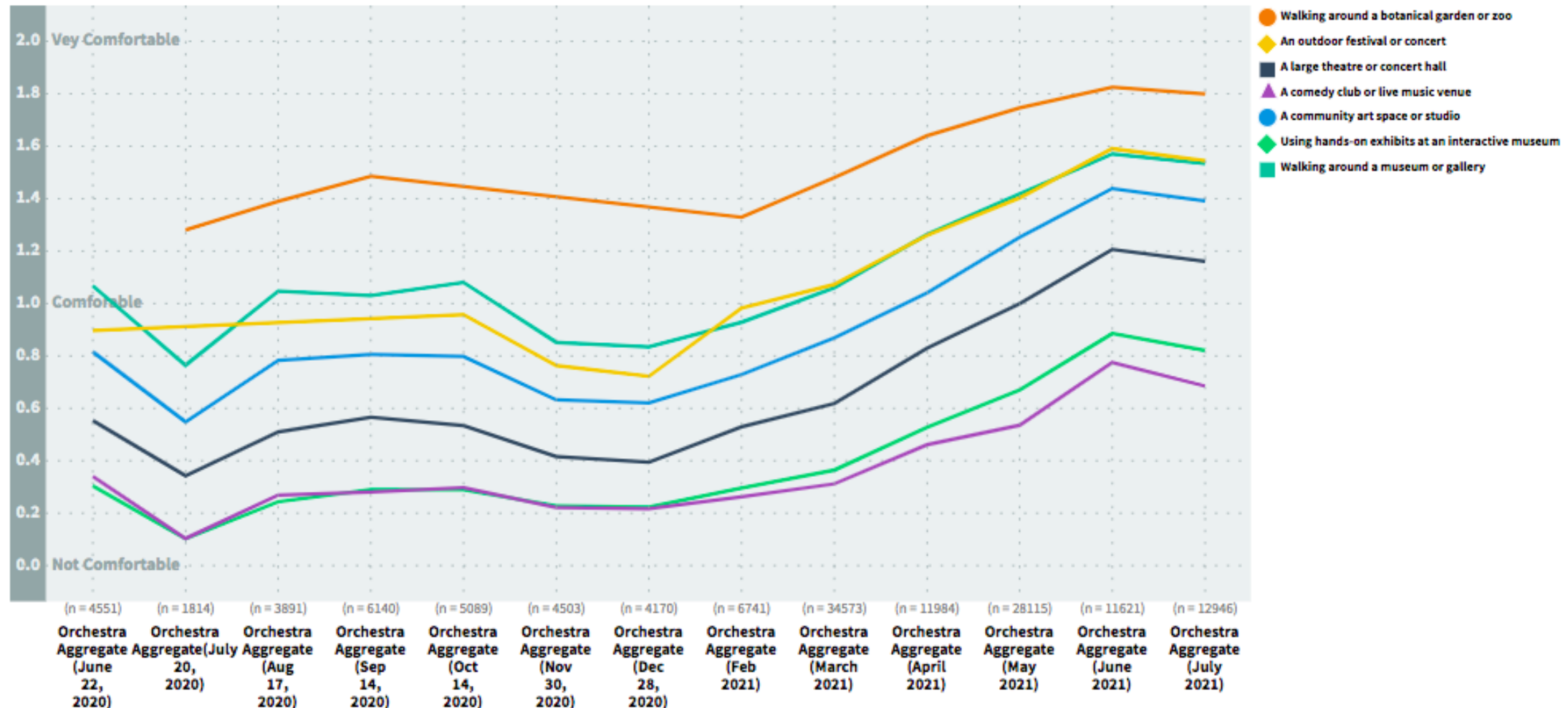
(Also on protocols 1-4. Protocol 2 specified these as indoor facilities except for the option “walking around a botanical garden or zoo.” The option “walking around a botanical garden or zoo” was not on protocols 1 & 3. The option “an outdoor festival or concert” was not on protocol 2.)



# ...in fact, levels of comfort attending all kinds of venues regressed a bit in July; comfort levels for outdoor venues are still much higher

How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following local health guidelines?

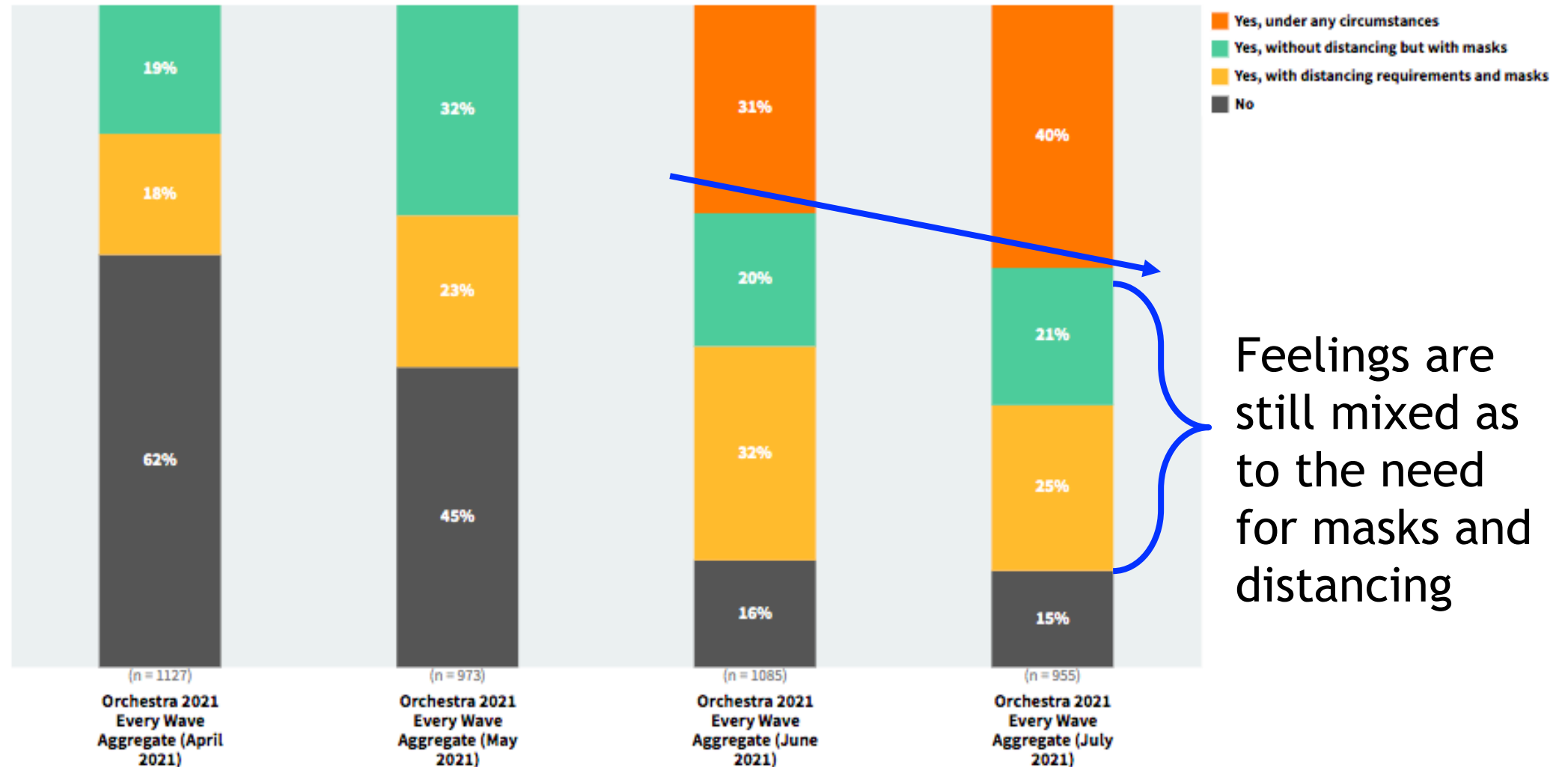
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# July brought a positive shift in attitudes about going out “under any circumstances” (from 31% to 40%); still, half of all respondents feel that masks and/or distancing are needed

If given the opportunity, would you attend an indoor cultural event this week?

(Also on protocol 4. The “Yes, under any circumstances” option was added in June 2021.)

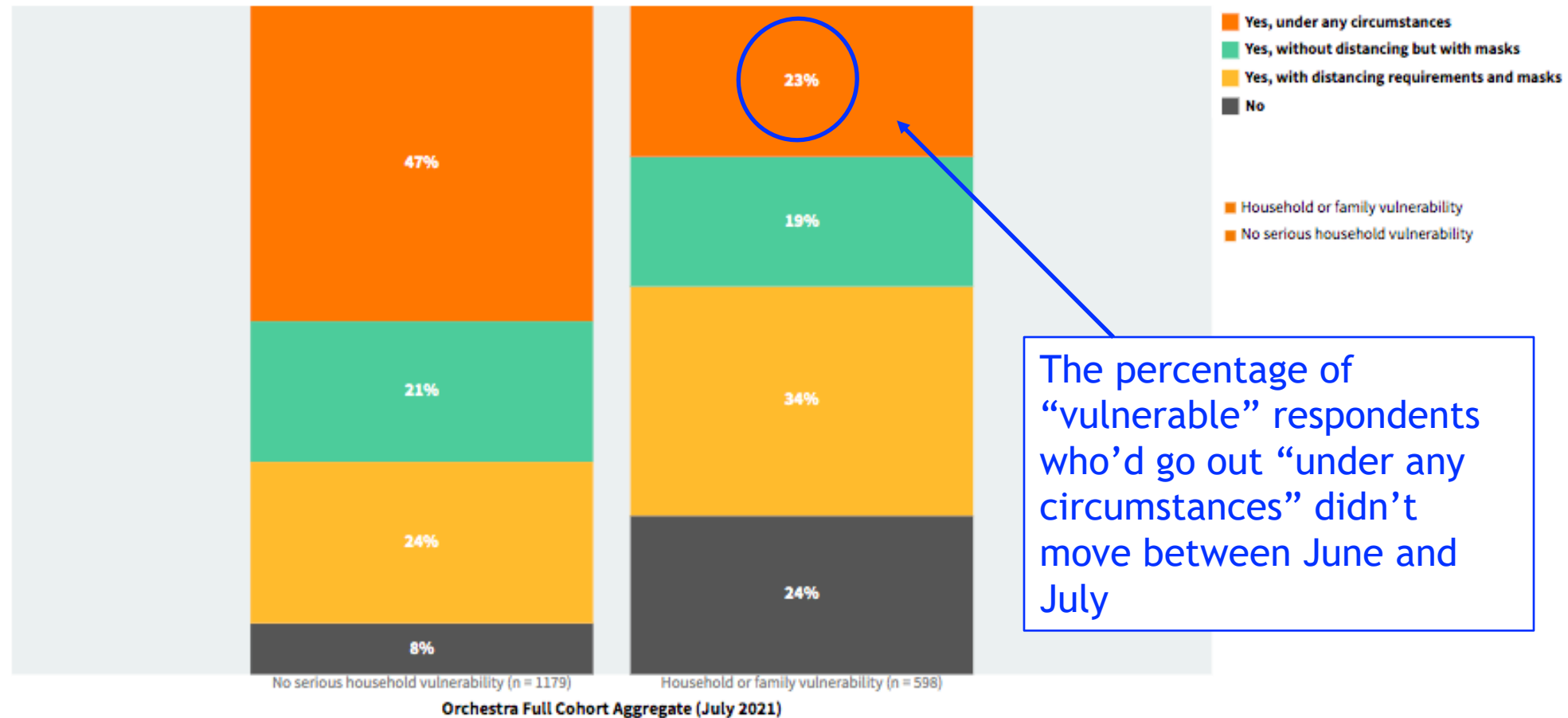


**Household vulnerability to a serious health outcome remains the main driver of readiness**

If given the opportunity, would you attend an indoor cultural event this week?

(Also on protocol 4. The "Yes, under any circumstances" option was added in June 2021.)

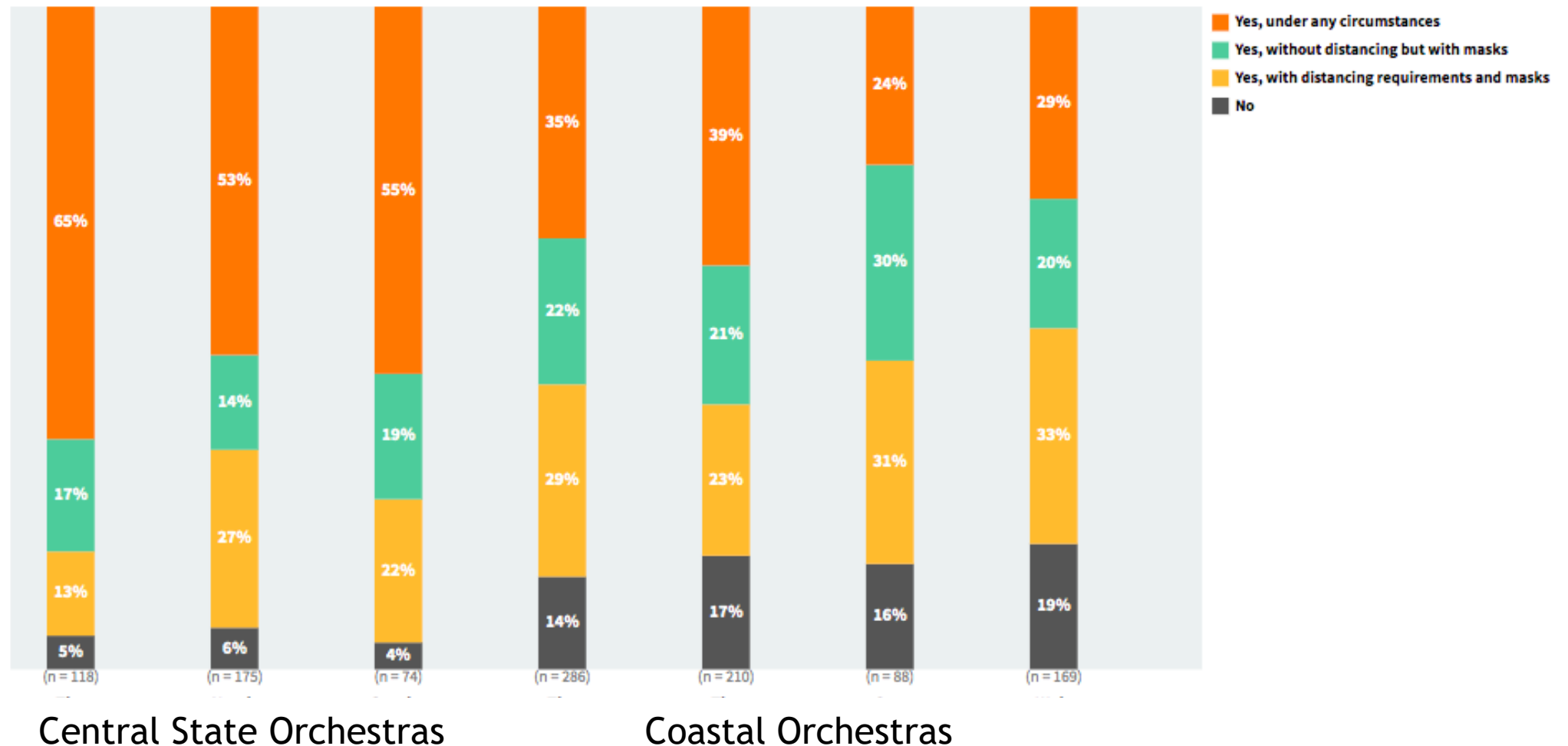
Filter: Serious Health Vulnerability



# Audiences for orchestras located in central states are much more willing to go out “under any circumstances”

If given the opportunity, would you attend an indoor cultural event this week?

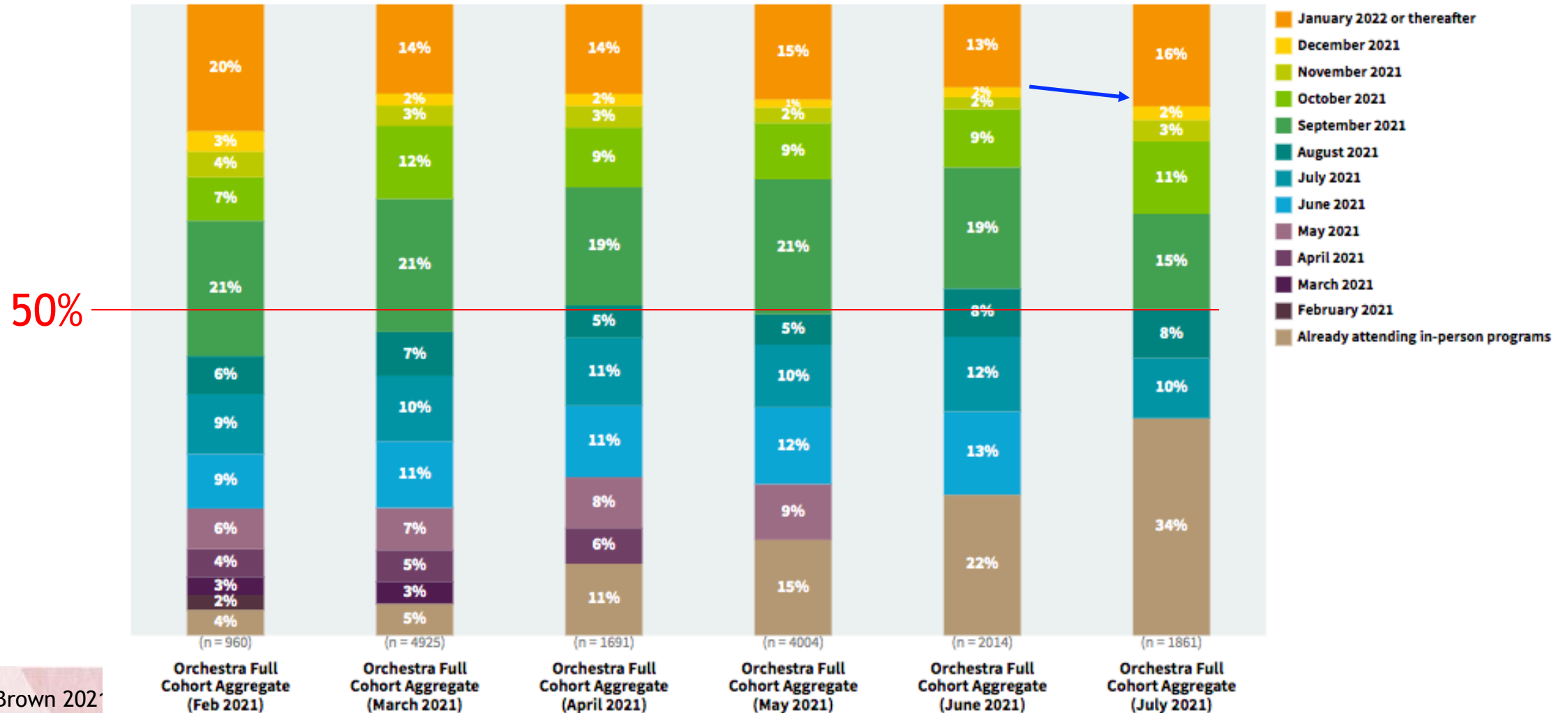
(Also on protocol 4. The “Yes, under any circumstances” option was added in June 2021.)



# Anticipated month of re-entry regressed a bit in July

Given the current rates of COVID-19 infection and progress with vaccination roll-out, when do you think you'll resume attending live performing arts programs?

(Also on protocol 4)



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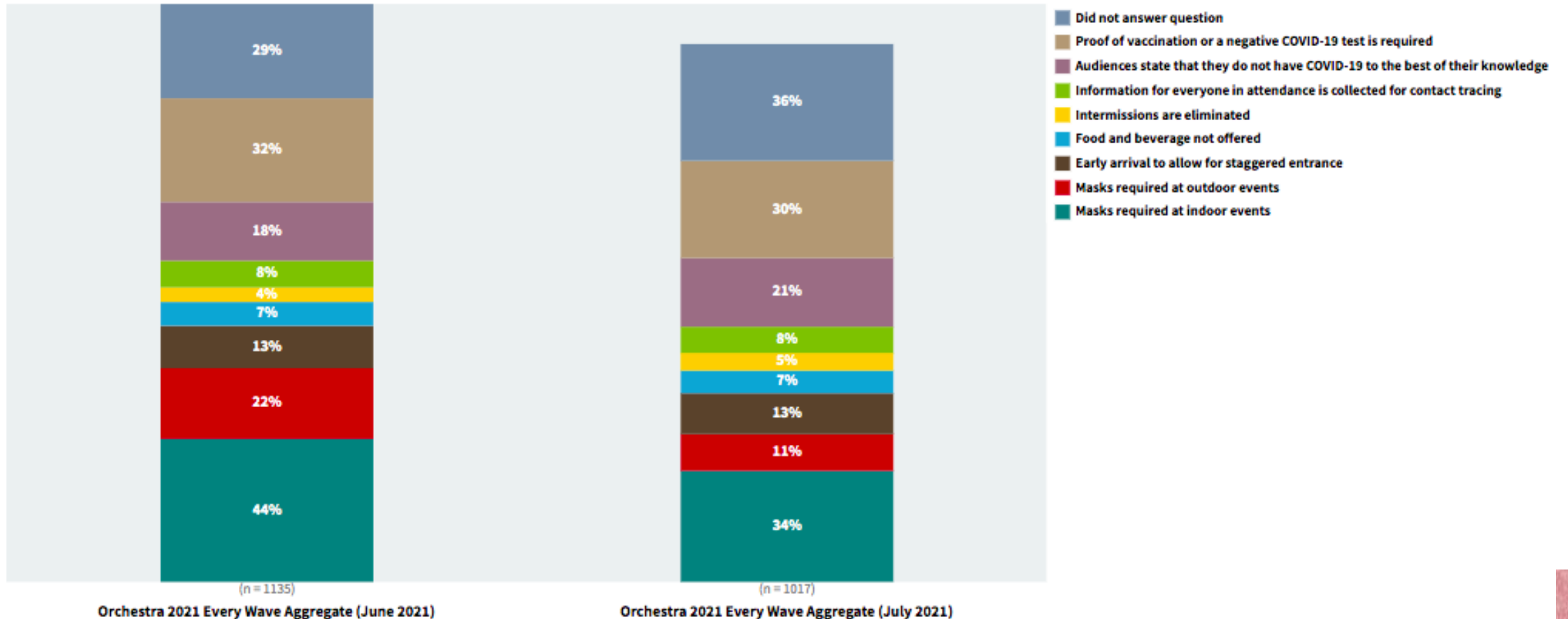
**Attitudes about vaccinated-only  
admittance policies**



# “Prerequisites” for going out are a moving target; 34% won't attend without a mask requirement, down from 44% in June; 30% won't attend without a proof of vaccination requirement

Which of the following policies are prerequisites for you to attend an in-person event this week?

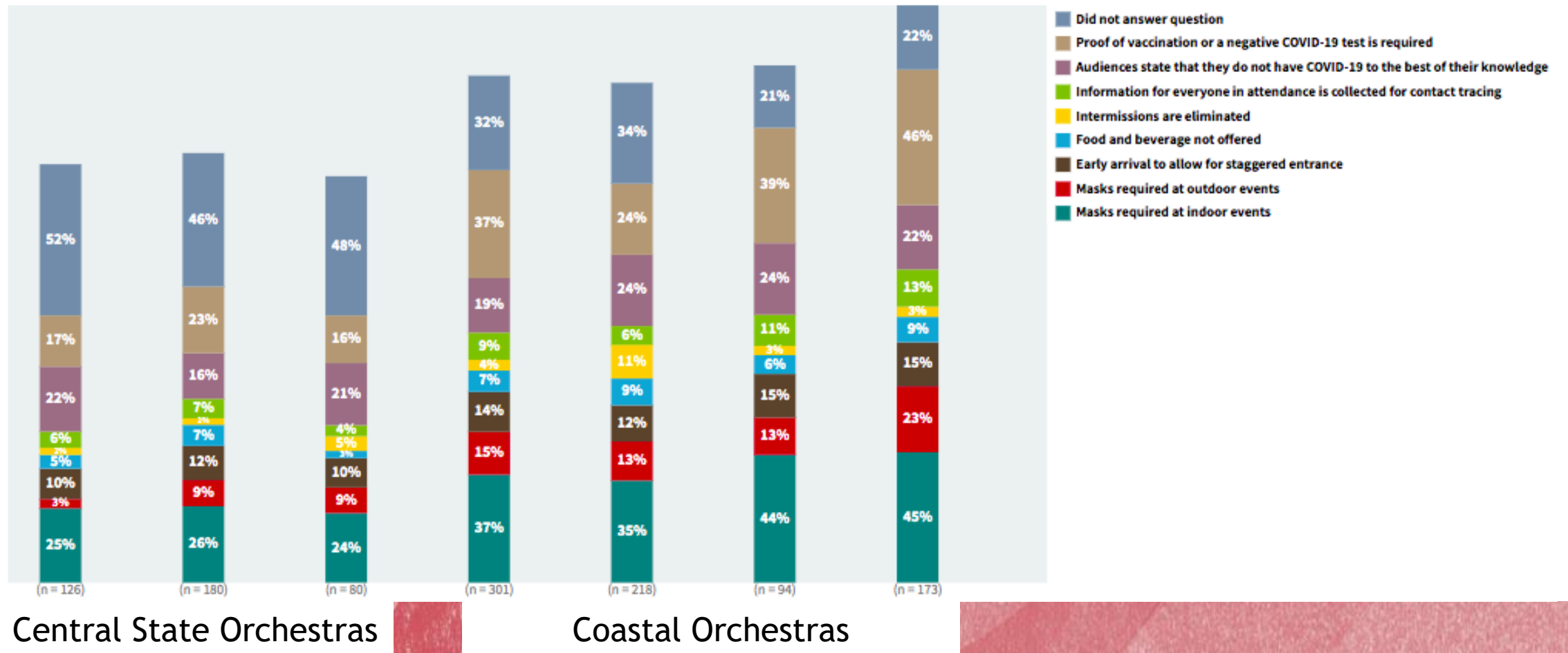
Note: columns on 'select multiple' questions will not total 100%.



# Audiences for orchestras located in central states are half as likely to say they won't go out without a proof of vaccine admittance policy

Which of the following policies are prerequisites for you to attend an in-person event this week?

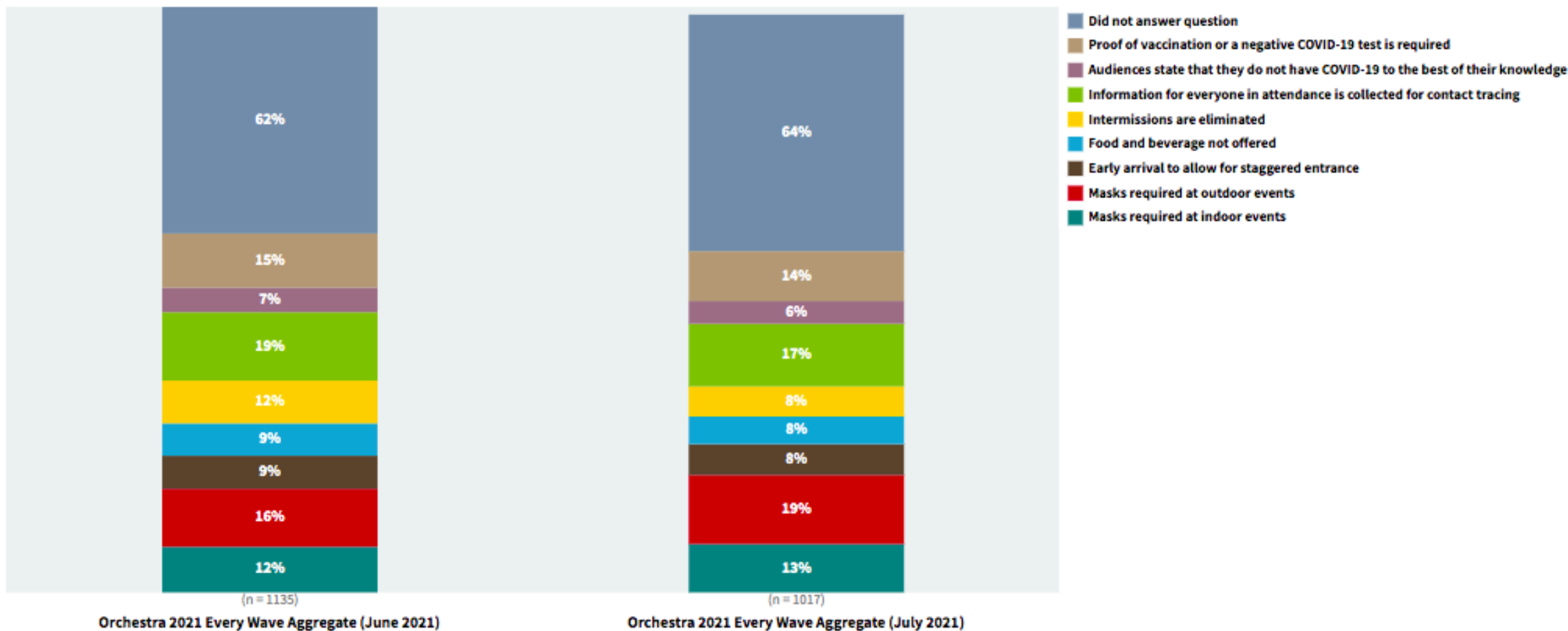
Note: columns on 'select multiple' questions will not total 100%.



# Looking now at “deal breakers” - anywhere from 64%, on average, don’t have any; 14% say they won’t attend if proof of vaccine is required; the real story is one of regional variation

Which of the following policies are deal breakers, prohibiting you from attending an in-person event this week?

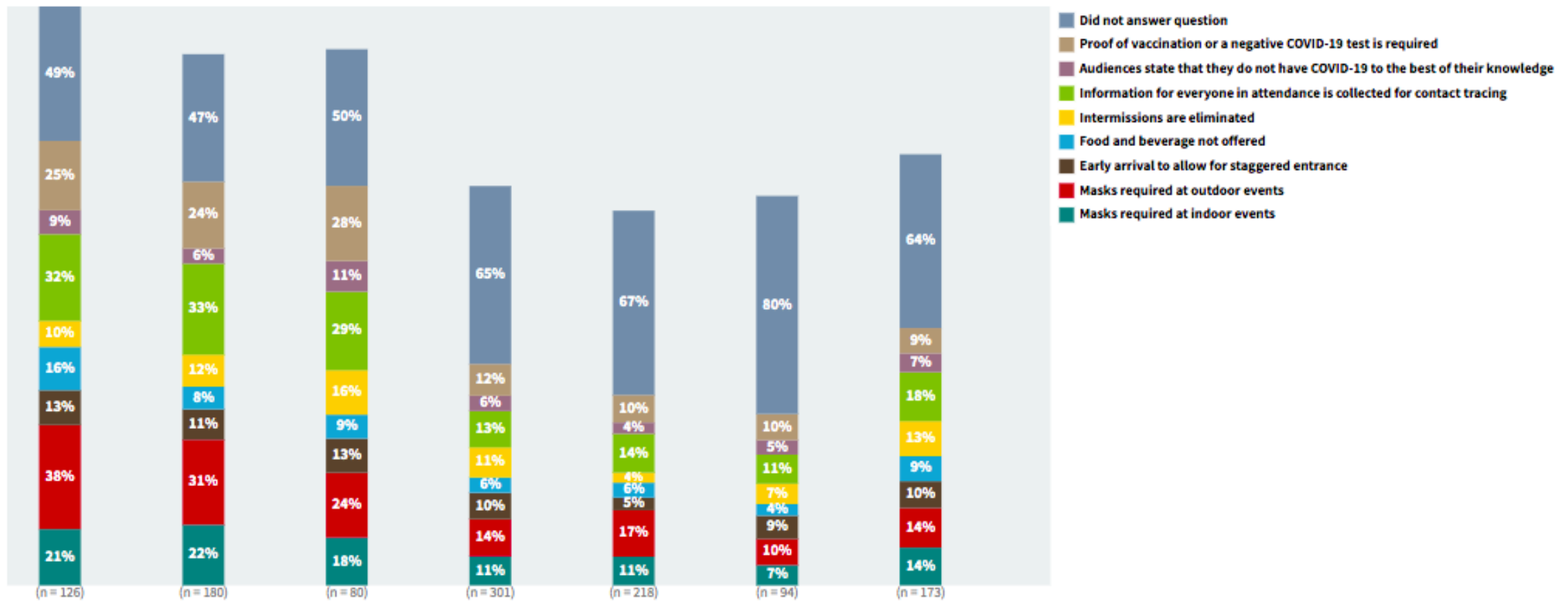
Note: columns on 'select multiple' questions will not total 100%.



# Audiences for orchestras located in central states have much stronger feelings about deal breakers; in fact, more won't attend if proof of vaccine is required than will attend because of it

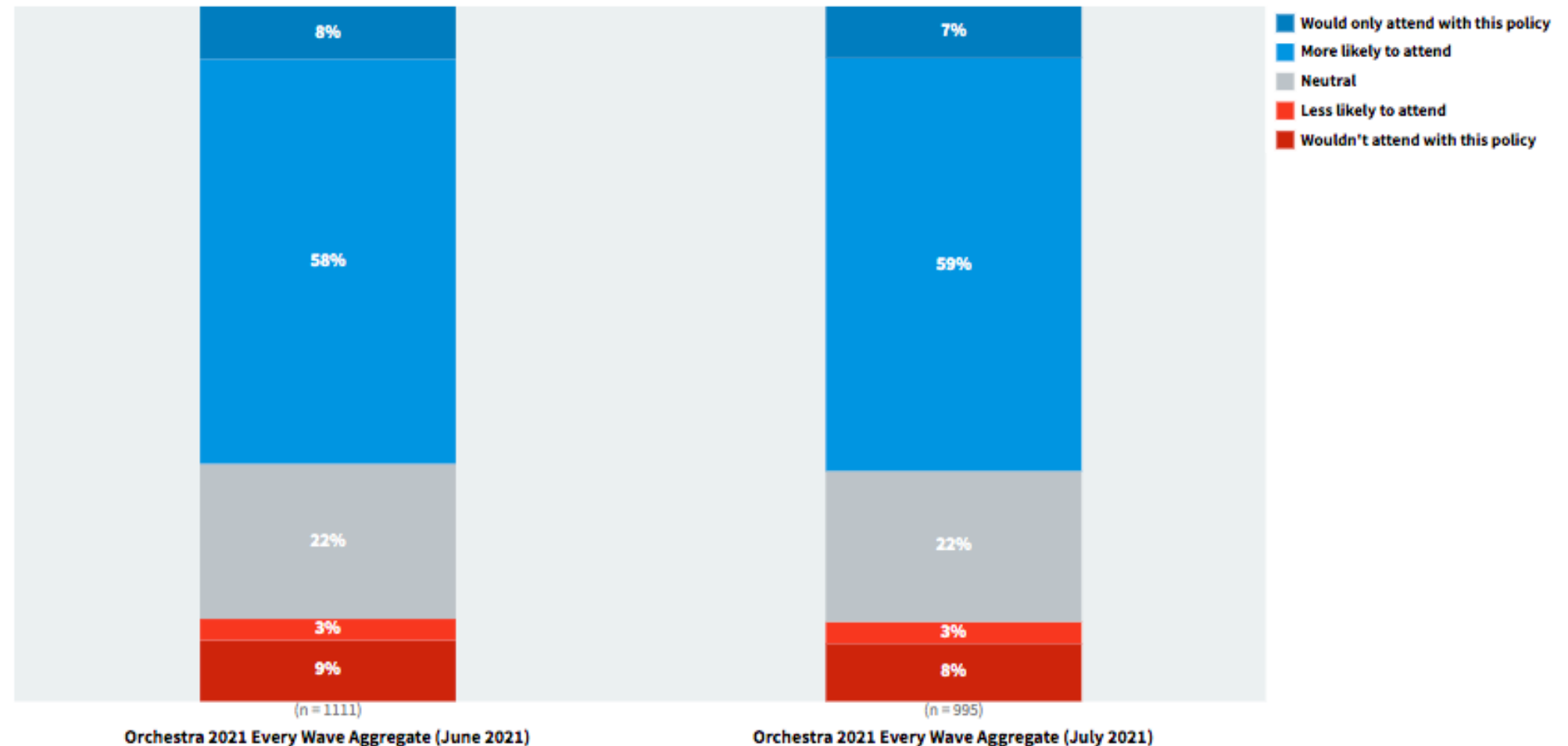
Which of the following policies are deal breakers, prohibiting you from attending an in-person event this week?

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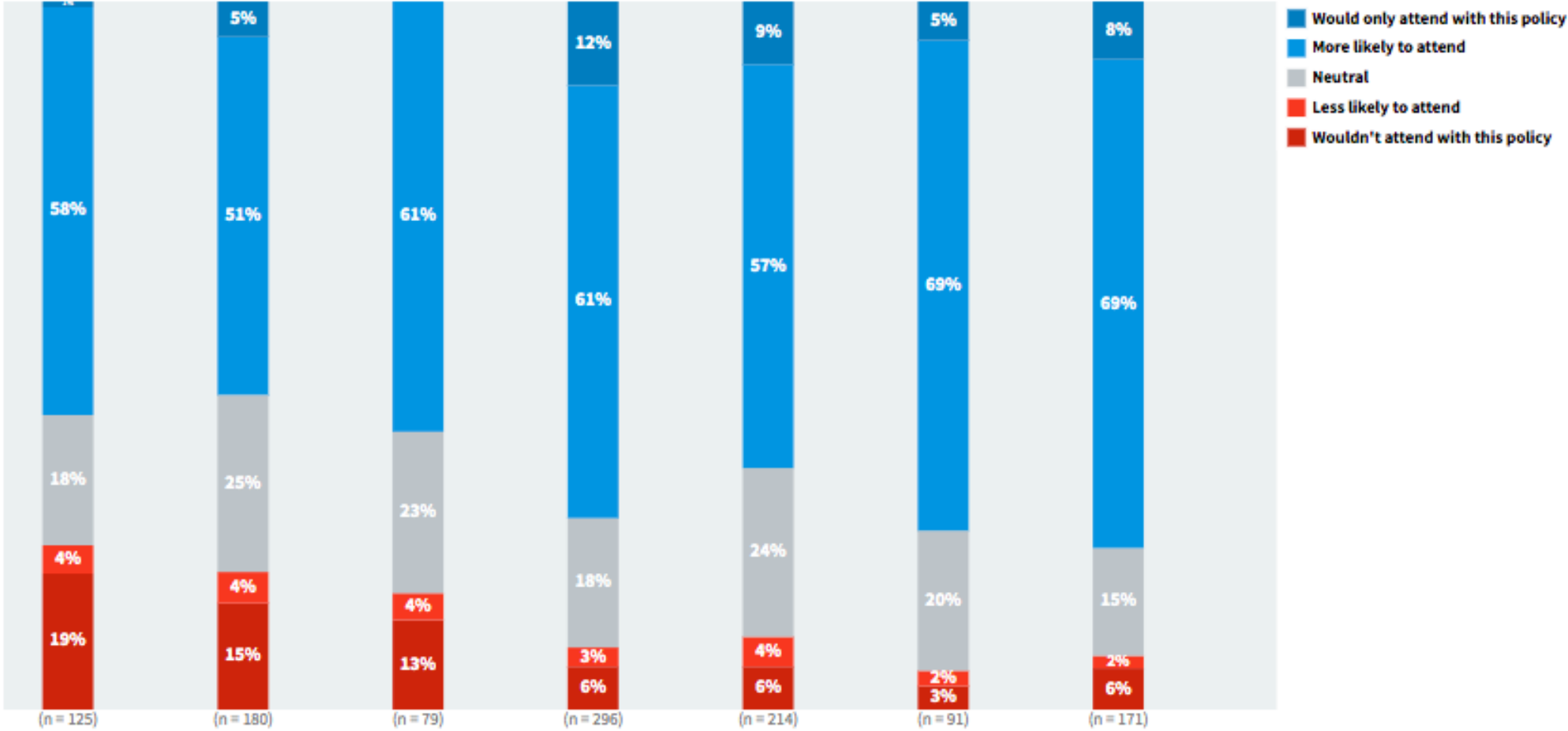
# Most respondents say proof-of-vaccine admittance policies would encourage them to attend

In some states arts and cultural organizations are allowed to welcome back larger audiences if everyone in the audience shows proof of vaccination. How would a vaccinated-only admittance policy impact your feelings about attending in-person events?



# Audiences for orchestras located in central states are less likely to say that vaccinated-only admittance policies would encourage them to attend, but still positive about these policies overall

In some states arts and cultural organizations are allowed to welcome back larger audiences if everyone in the audience shows proof of vaccination. How would a vaccinated-only admittance policy impact your feelings about attending in-person events?



# Reasons for Supporting Vaccinated-only Admittance Policies

- **Don't trust others**

- “Because unvaccinated people are the only risk to the rest of us. They don't deserve to have a normal life.”

- **Its safer and reduces transmission**

- “I know I will not be sitting next to someone who has not been vaccinated.”

- **Protecting others**

- “I know I will not be sitting next to someone who has not been vaccinated.”

- **Less stressful experience**

- “It would reduce the stress of inadvertently passing the virus to others and the minimal risk of catching the virus. Bottom line: it would be a more carefree environment.”

- **Sense of personal responsibility**

- “Less likely to be a super spreader event. I believe it's the responsible thing to do.”

# Objections to Vaccinated-only Admittance Policies

- **Vaccination status is a personal and confidential matter**
  - “I feel like it's immoral to require people to give you their medical records, if not illegal.
- **Its discriminatory**
  - “I feel it's discriminatory and separatist.”
- **Don't believe Covid-19 is a problem/has been over-played**



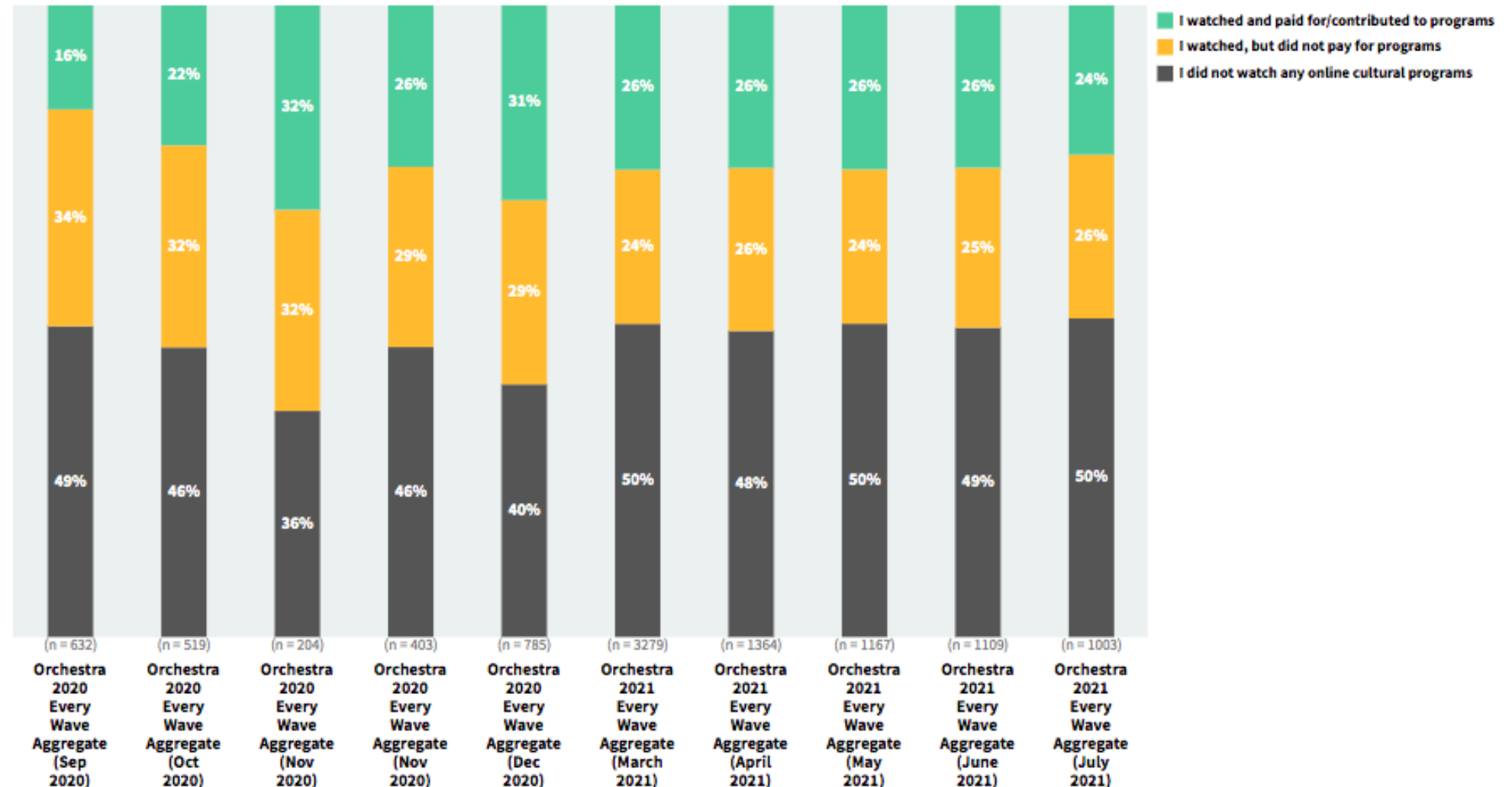
**AUDIENCE  
OUTLOOK  
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# Key Indicators of Demand for Digital Programs

# Incidence of paid and free consumption of digital content (past two weeks) held steady in July

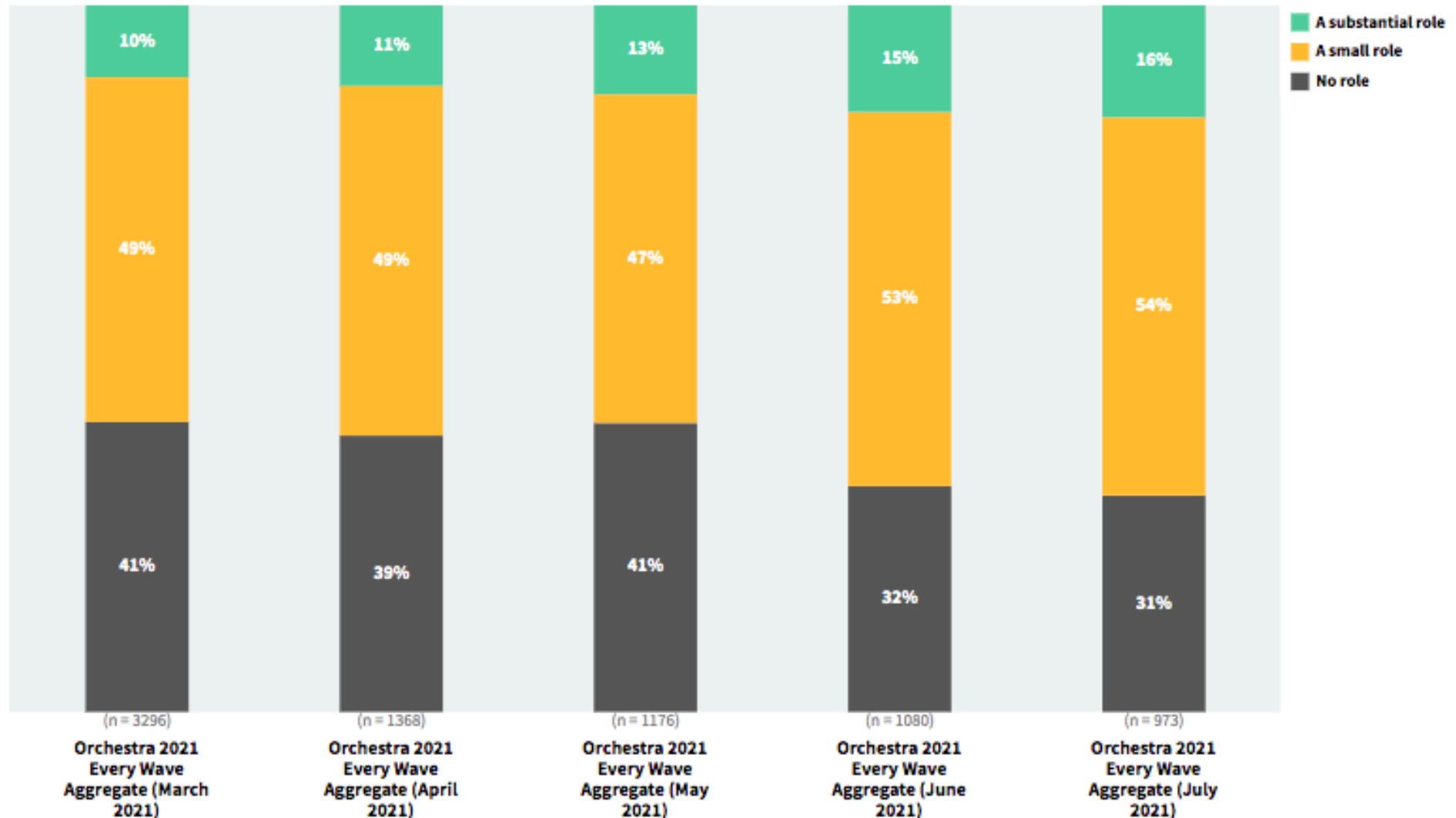
Please select the option that best describes your engagement with online cultural programs in the past two weeks.

(Also on protocols 3 & 4)



# Post-pandemic relevance of online programming is holding steady

Once facilities reopen and it's possible to attend in-person programs as often as you'd like, what role will online programs play in your cultural life?



# Takeaways for July 2021

- The 7-month pattern of improvement in attitudes about going out halted in July, with some indicators moving **backwards**
- On the positive side, 85% of audiences are ready to go out if their pre-conditions for going out are met
  - Of the 85%, however, just over half won't go out unless masks and/or distancing are required
- The proportion of “vaccinated but reluctant” respondents did not move between June and July; a third are **still waiting** for epidemiological conditions to improve
- The calendar for returning **regressed a bit** for July; between 17% and 21% do not anticipate returning to live events until Jan. 2022 or thereafter
- The mask dilemma persists: ~35% to 45% won't go out **WITHOUT** a mask requirement, while ~6% to 14% won't go out **WITH** one (little change from June)
- Attitudes about vaccinated-only admittance policies are increasingly favorable, with significant variation across markets; **between 30% and 45% say they won't go out unless proof or vaccine is required**

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**Q&A**

# Upcoming Deep Dive Webinars

## Deep Dive Webinars for 2021 (all from 1:30 - 2:30 p.m.)

- April 5: Focus on Racial/Ethnic Disparities in Audience Attitudes about Covid-19 - **recording available**
- May 3: Strategic Communications around Venue Safety - **recording available**
- June 7: A Close Examination of Who's Ready to Go Out, and Who's Not - **recording available**
- June 28: The Future of Digital Programming, Part 1 - **recording available**
- Aug. 2: **Normalization of Covid-19 - open to all; register on the home page**
- Sept. 13: Post-Vaccination Hesitancy: Who's Still Not Ready to Go Out?
- Oct. 4: Tracking the Experience of Early Returners
- Nov. 1: The Future of Digital Programming, Part 2
- Nov. 29: Capstone Assessment: Critical Reflection on the Role of Research in Sector Learning

# AUDIENCE OUTLOOK MONITOR

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- The next Executive Briefing will be August 16 at 1:30PM EDT