

AUDIENCE OUTLOOK MONITOR

A longitudinal study of audience attitudes about arts
and cultural events during COVID-19

Findings for the Bay Area Cohort

Overview of Results: November 2021



In partnership with



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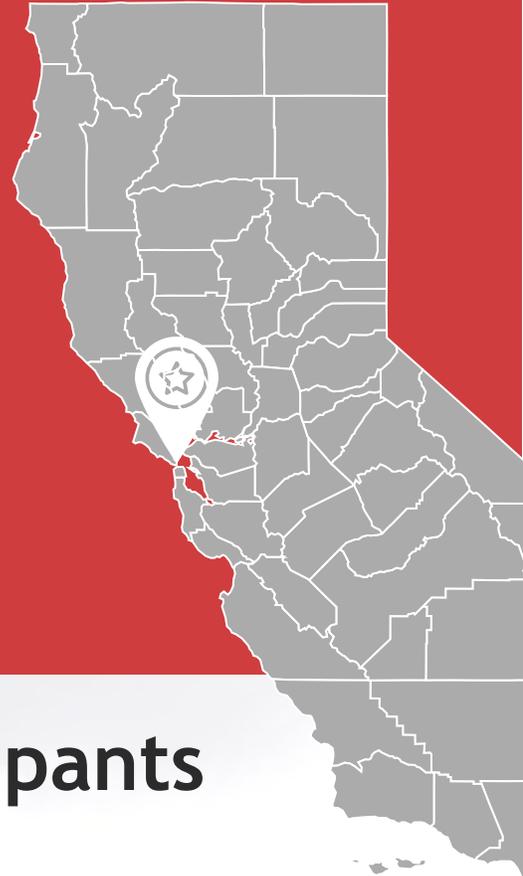
About the Study

The COVID-19 Audience Outlook Monitor is a longitudinal tracking study of audience attitudes about going out to cultural events during and after the COVID-19 pandemic. The study is being administered by WolfBrown.

Theatre Bay Area hosted a cohort of 14 organizations for Phase 1 in 2020, and is hosting a cohort of 20 organizations for Phase 2 in 2021.

Participating organizations will deploy the survey either three times or five times in 2021, depending on the size of their database.

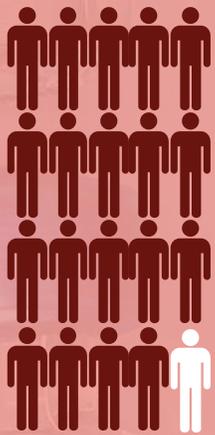
This report covers results from the fifth and final deployment, launched November 9, 2021, which generated approximately 2,400 completed surveys.



Phase 2 Cohort Participants

- American Conservatory Theater
- Aurora Theatre Company
- Berkeley Repertory Theatre
- City Lights Theater Company
- Curran
- Custom Made Theatre Co
- Golden Thread Productions
- Marin Theatre Company
- New Conservatory Theatre Center
- San Francisco Ballet
- San Francisco Opera
- San Francisco Symphony
- Shotgun Players
- TheatreWorks Silicon Valley
- Z Space

Vaccination

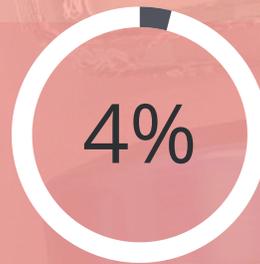
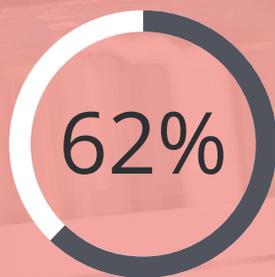


99%

Of respondents are partially or fully vaccinated

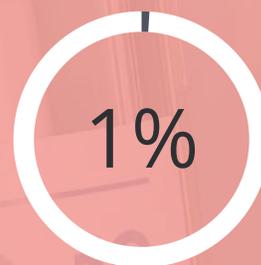
98% in September

When will vaccinated respondents be ready to return to in-person arts and cultural events?



4% in September

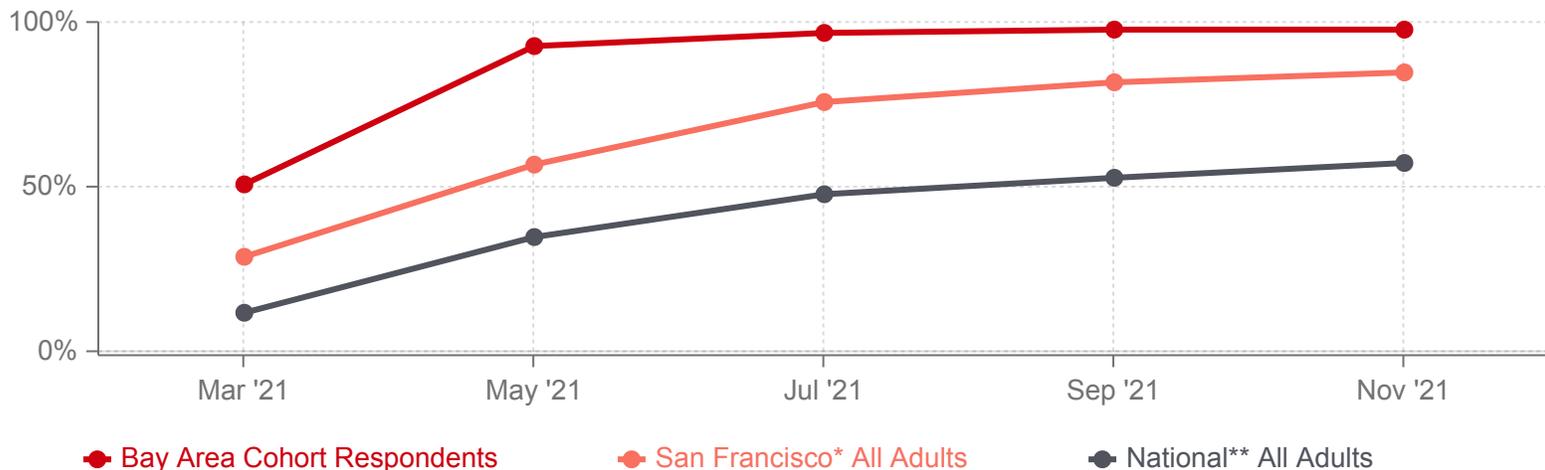
51% in September



4% in September

3% in September

How do respondents' rates of full vaccination compare to national figures?



* Visit the [SF.gov](https://www.sf.gov) website by City & County of San Francisco for vaccine data.
 ** Visit the [Center for Disease Control and Prevention](https://www.cdc.gov) website for national vaccine data.

Vaccination

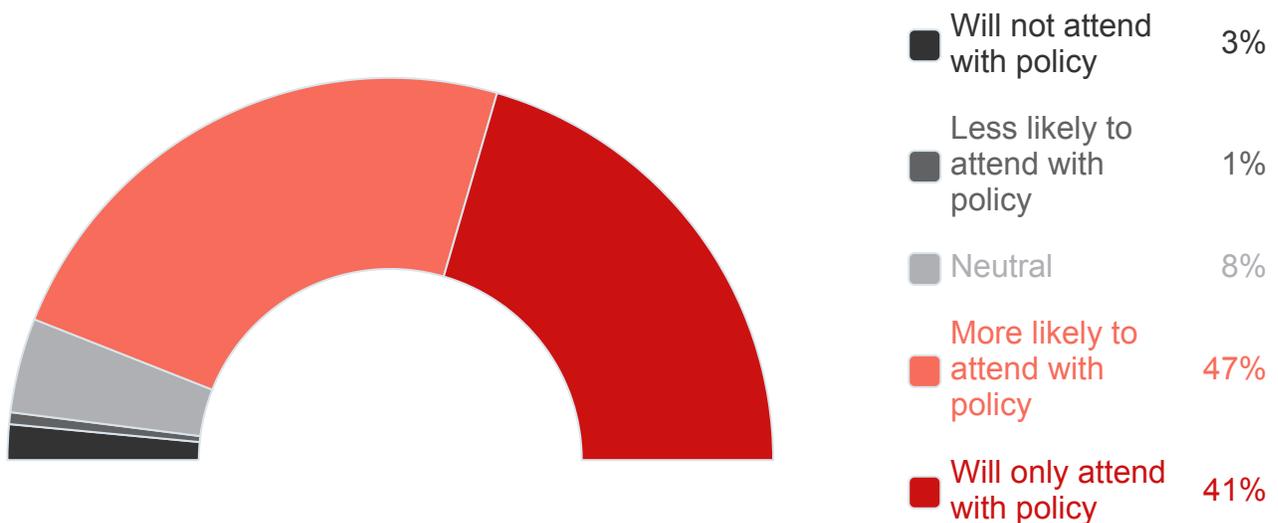
70%

51% in
September



Of vaccinated respondents reported that they are somewhat or very confident that the vaccine protects them enough for them to resume their normal activities

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?

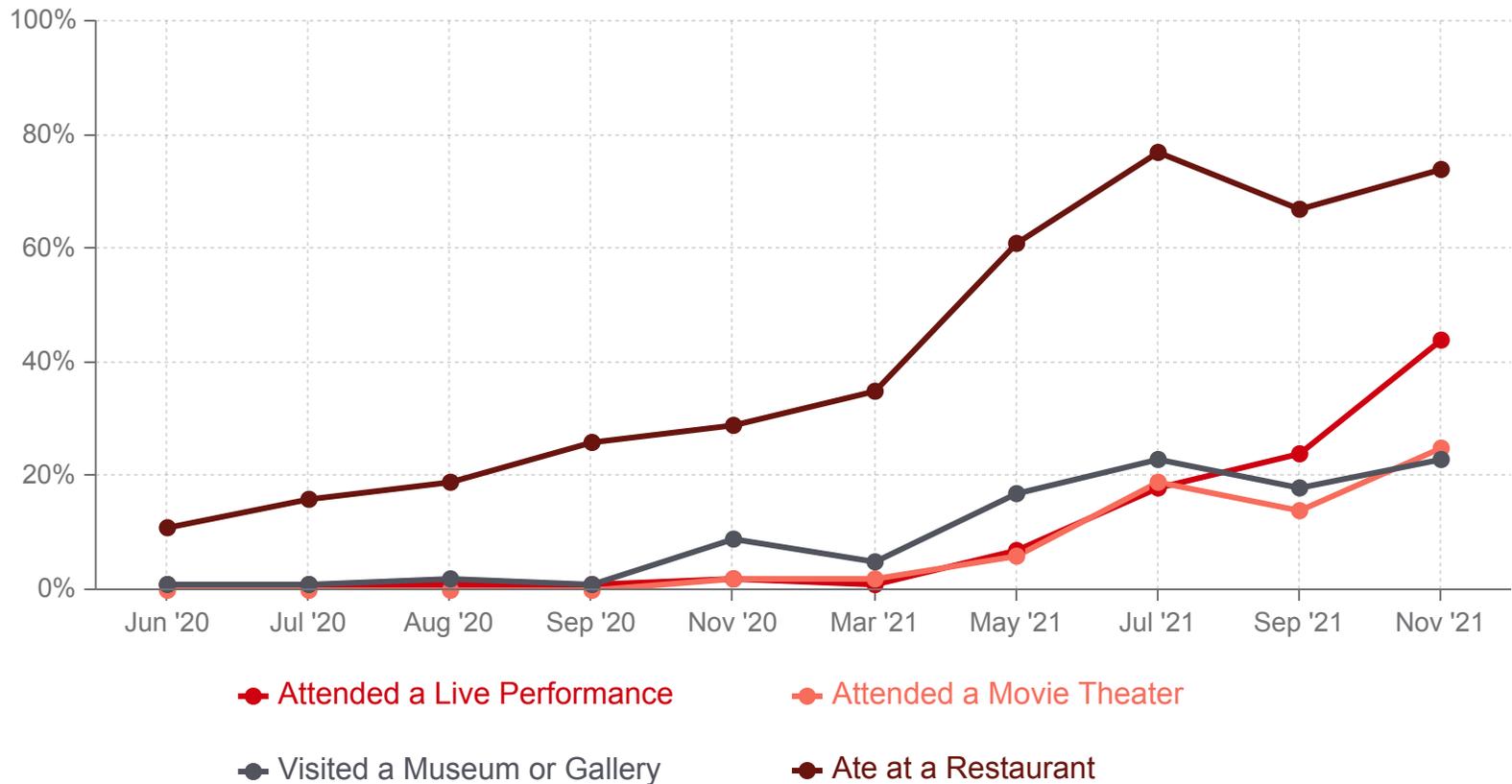


"Current evidence suggests that vaccines only have a small sterilizing effect, i.e. they only reduce the spread of covid to a small extent (whereas they are much more effective at preventing severe symptoms). I'd rather attend an event with a strictly enforced mask policy and no vaccination check than an event with lax mask enforcement and a vaccine check."

"We all need to do our part to end the virus, and this nonsense about making it political is crazy. If you don't get vaccinated, there should be consequences. Yes, you have your choice, but every choice has consequences. We should not have to be afraid to go out because other people won't do their part to stop further mutations that could be vaccine resistant."

Returning to In-Person Programs

Have respondents attended in-person events in the last two weeks?



Many people report eating in restaurants, but not going to theaters quite yet. Why do you suppose some people feel comfortable going to restaurants but not theaters?

"I went to my first live theater last week, but there was distancing, masks, and proof of vaccination. One sits in a theater for a longer time and in closer proximity to people than in restaurants. Also, theaters tend to have poor ventilation, and are often small. The quality has to be excellent to take a risk. It's not worth it."

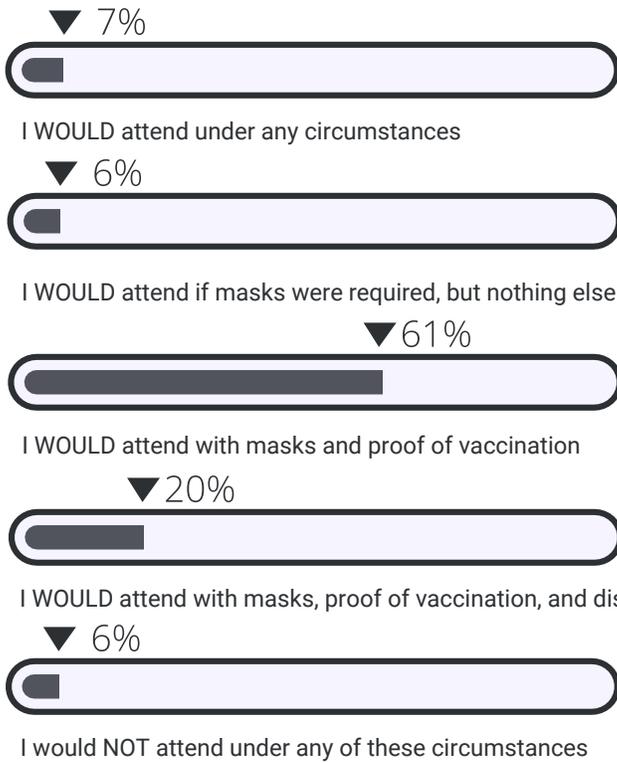
"Can't speak for other people, but I occasionally eat in restaurants when I can see immediately if there is sufficient space for distancing or not, before paying/committing. I also have gone to one movie matinee on a weekday, when I could be reasonably sure of a small audience."

"It's not logical at all. I suspect it's because restaurants feel more essential than theaters, and are more of an everyday activity. People are willing to resume some everyday activities, but going to the theater is a special event and as such can be deprioritized."

Returning to In-Person Programs

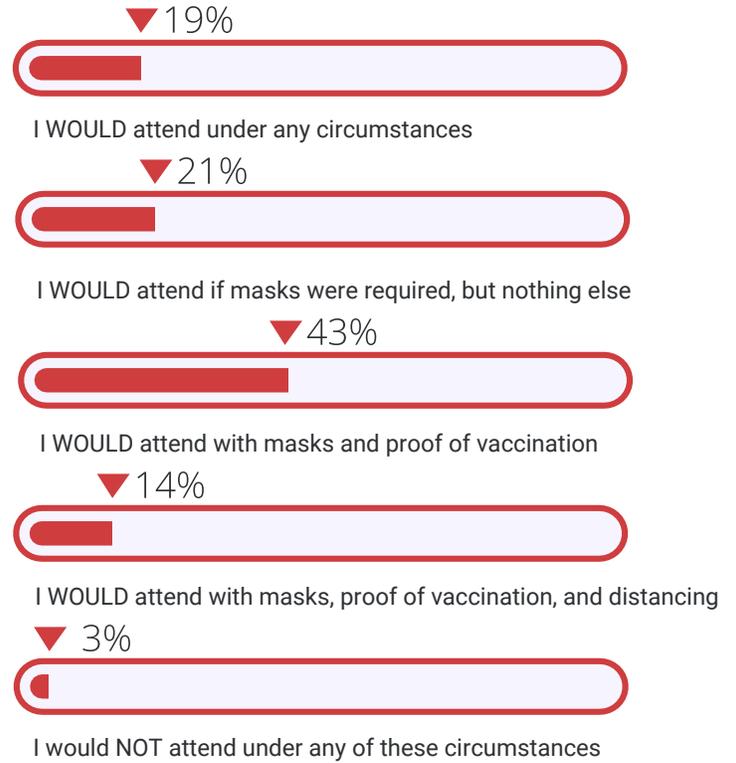
Indoor Events

What are the minimum level of health safety measures that you require in order to attend an indoor cultural event this week?



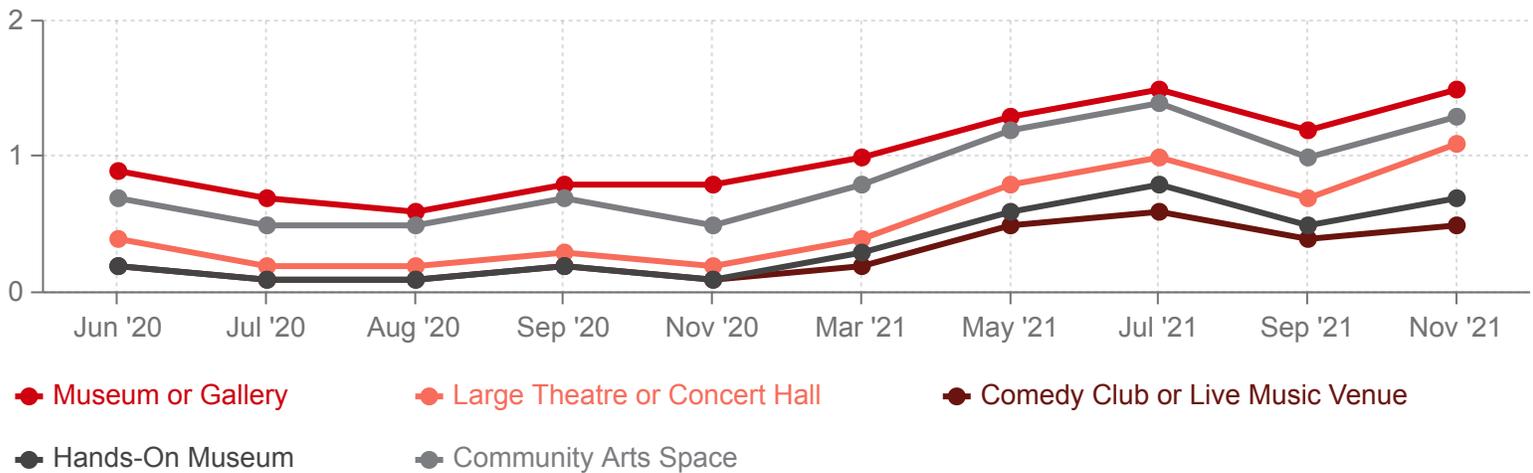
Outdoor Events

What are the minimum level of health safety measures that you require in order to attend an outdoor cultural event this week?



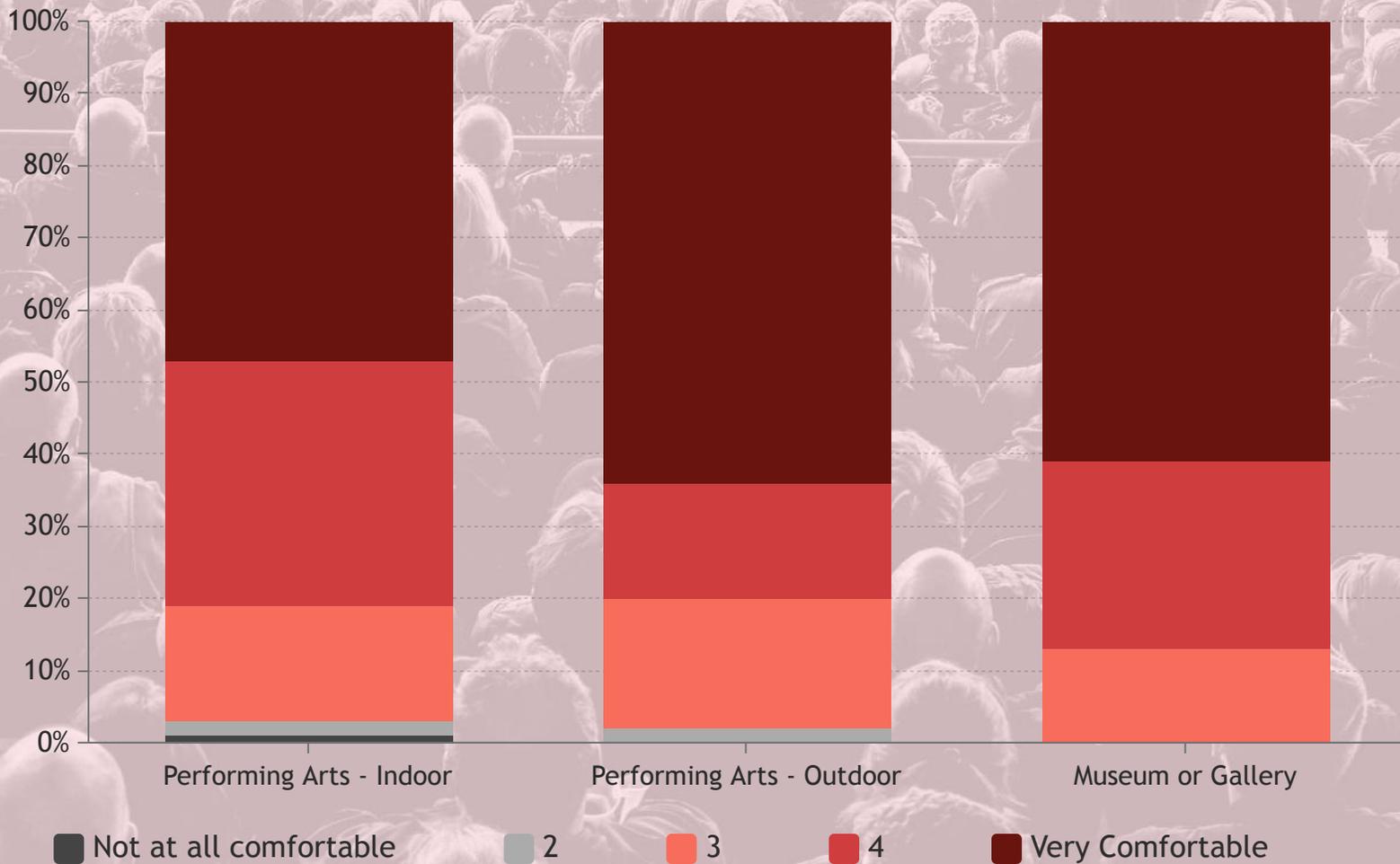
Comfort Level Attending Different Cultural Facilities

0 = Not Comfortable and 2 = Very Comfortable



In-Person Experiences

How comfortable did respondents feel at in-person events?



What would have made respondents feel more comfortable?

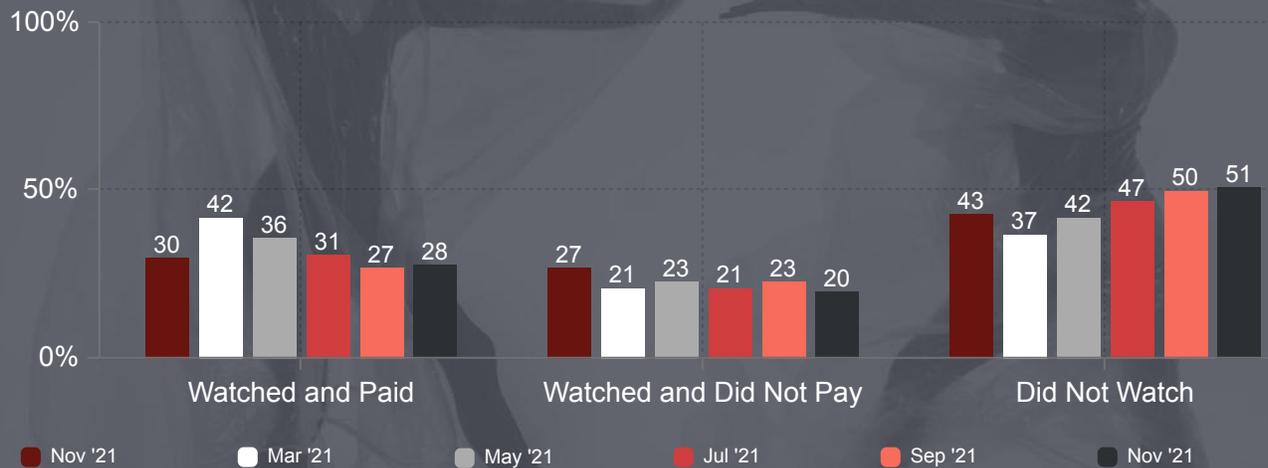
"Someone in the roll of seats in front of me wore their mask hanging from one ear despite posted signs and announcements that masks were supposed to be on for duration of opera. Who is supposed to monitor this? I told usher at intermission, but mask was off after intermission as well."

"Not allowed patrons to enter the auditorium with drinks and/or food. This would have facilitated requiring all patrons to be masked inside the venue at all times."

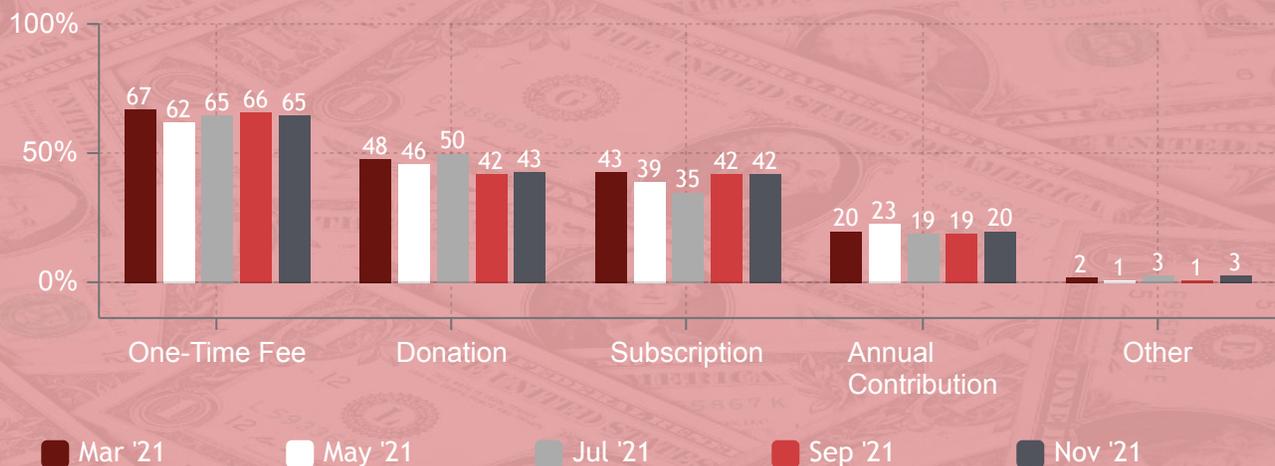
"There were a lot of people clumped together at the beginning because they started with a video in a theater. They could have spaced people out more and created a single path through. They also should have had more stations for the interactive bit, few stations caused traffic jams."

Engagement With Digital Programming

How did respondents engage with online cultural programs in the last two weeks?



How did respondents who paid for online cultural programs purchase those programs?



For more information about this study or to view results from cohorts around the country and internationally visit audienceoutlookmonitor.com.

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