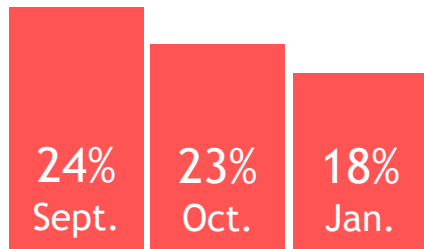
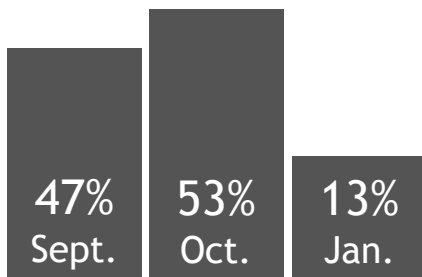


AUDIENCE OUTLOOK MONITOR

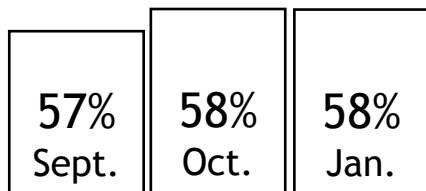
Key Indicators of Demand



Will resume attendance as soon as restrictions are lifted



Attended a restaurant or in person cultural event in the past two weeks



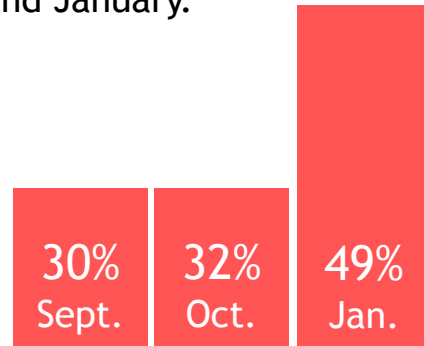
Trust the sending organization to determine when it is safe for visitors/ audiences to return

Pittsburgh Cohort Update

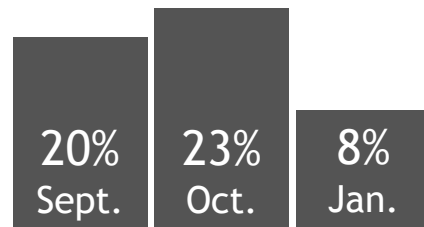
January 26, 2021

By: Benjamin Geibel

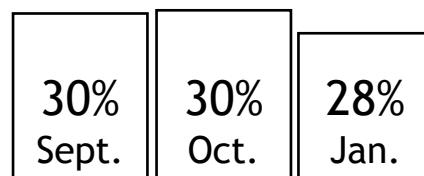
This briefing represents survey responses collected from 5,772 Western Pennsylvania arts & culture attendees in September, October, and January.



Will not resume attendance until they receive vaccination or immunity



Made plans to attend an in person cultural event in the past two weeks



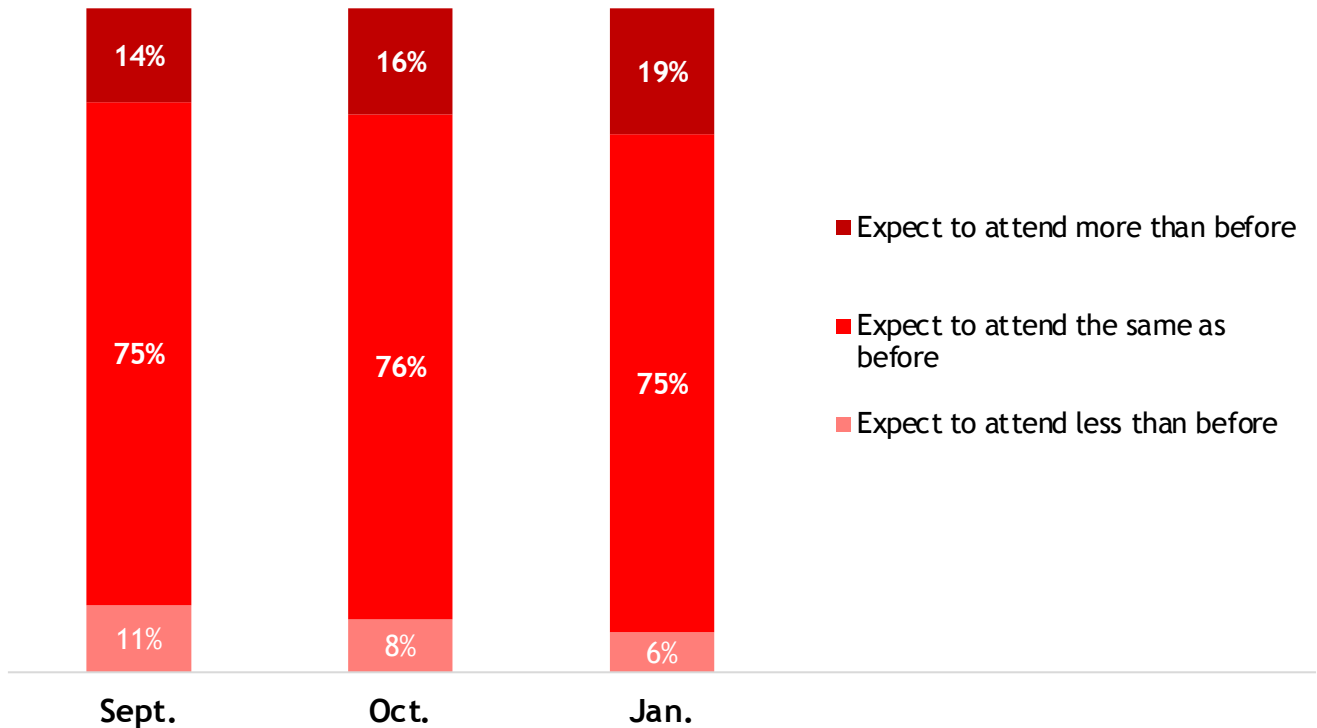
Trust other visitors/audience members to follow health safety rules

At A Glance

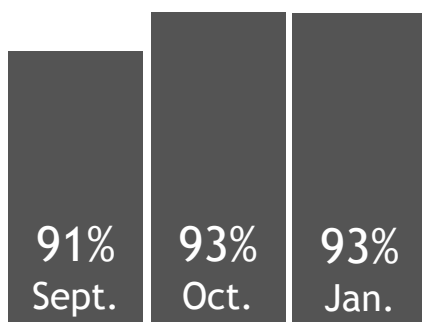
- The majority of respondents trust the sending organizations in terms of health safety measures, suggesting that communications about health safety from the sending organization will be both necessary and effective.
- The proportion of audience members who are willing to attend programming as soon as legally permitted remains low, with a little less than 20% of audiences ready to return now or as soon as permitted.
- A growing share of respondents say that they are waiting for vaccination before returning to cultural events, which aligns with the news that vaccines are now available to the most at-risk Americans.

Long Term Picture

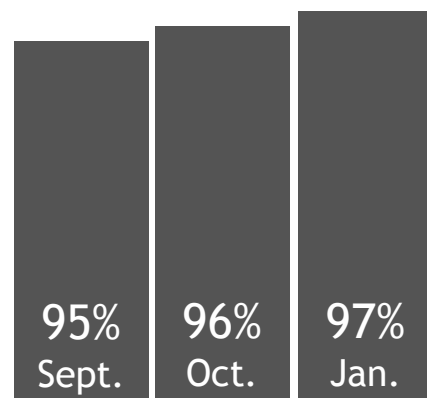
How will your attendance at arts and cultural activities be affected by the pandemic in the long-term, given your personal circumstances?



We also saw eagerness to return increase. In September 47% of respondents were 'very eager' to return to the sending organization. In January 2021, 56% reported being 'very eager' to return to the sending organization.



Will spend as much or more than they did before the pandemic on tickets, admissions, and memberships to the sending organization when they return to events



Will donate as much or more than they did before the pandemic to the sending organization when they return to events

Comfort Attending Cultural Venues

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



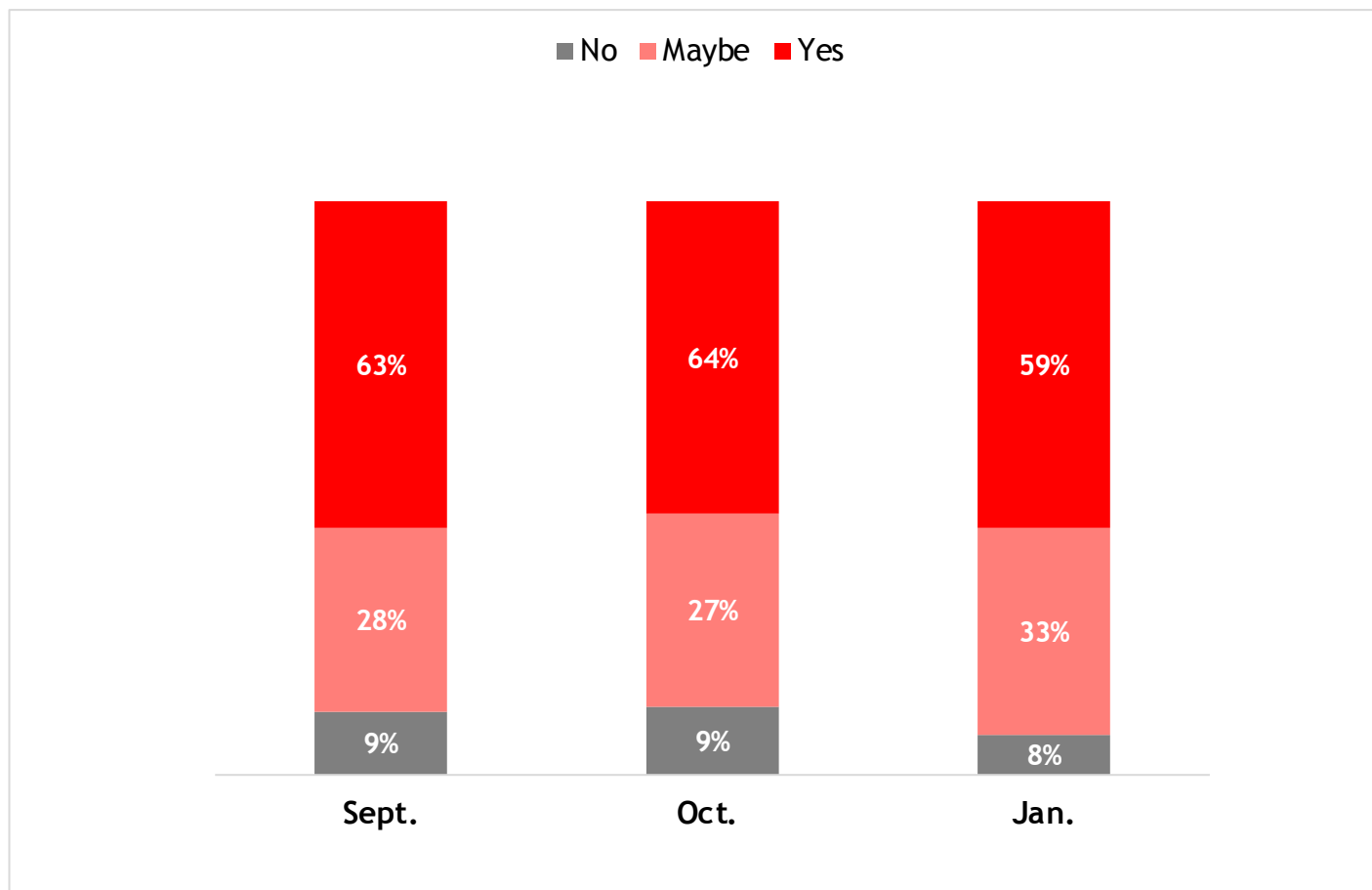
Are comfortable attending a large theatre or concert hall



Are comfortable walking around a museum or gallery

Health Safety Measures

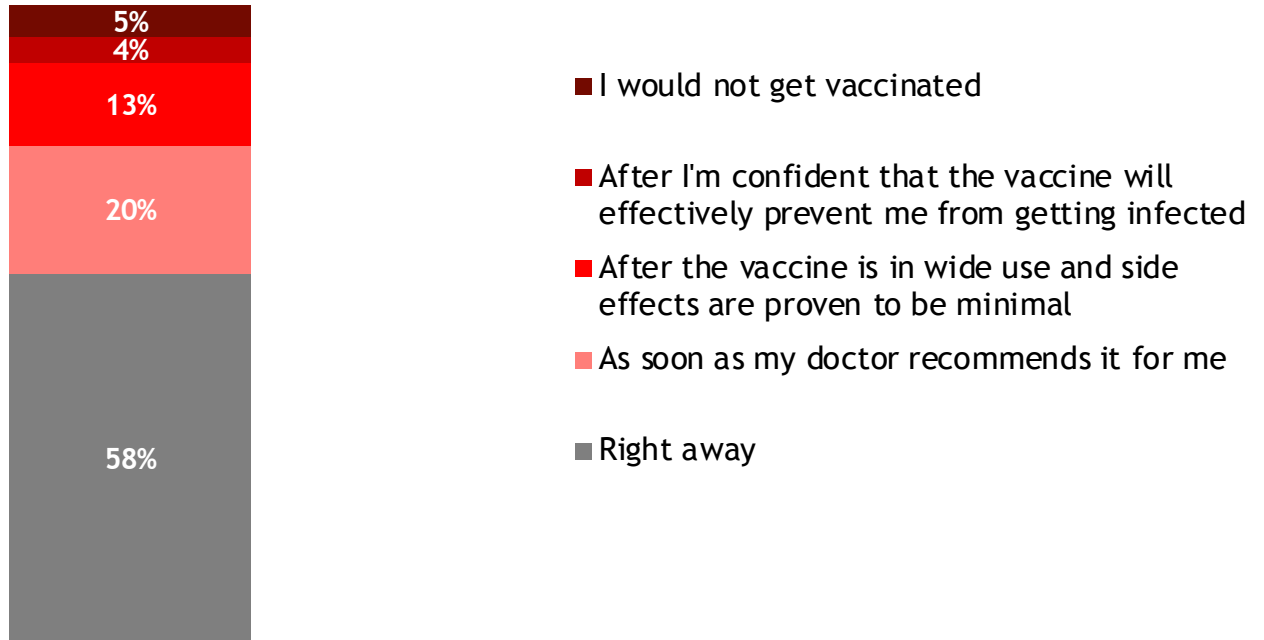
If you are required to wear a mask and adhere to distancing guidelines and other health safety precautions, will you still attend/visit?



Attitudes Towards Vaccination

When a federally approved COVID-19 vaccine is available to the general public, do you expect to get vaccinated....

January 2021



Why will respondents wait to get vaccinated?

- 35% "I am concerned about potential side effects from the COVID-19 vaccine"
- 15% "I am not sure the COVID-19 vaccine will be effective enough"
- 8% "I might not trust the company that develops the COVID-19 vaccine"

Why won't respondents get vaccinated (among the small percentage who indicate they won't get the vaccine)?

- 30% "I don't trust the COVID-19 vaccine"
- 42% "I generally don't take vaccines"
- 27% "I don't think it's necessary"

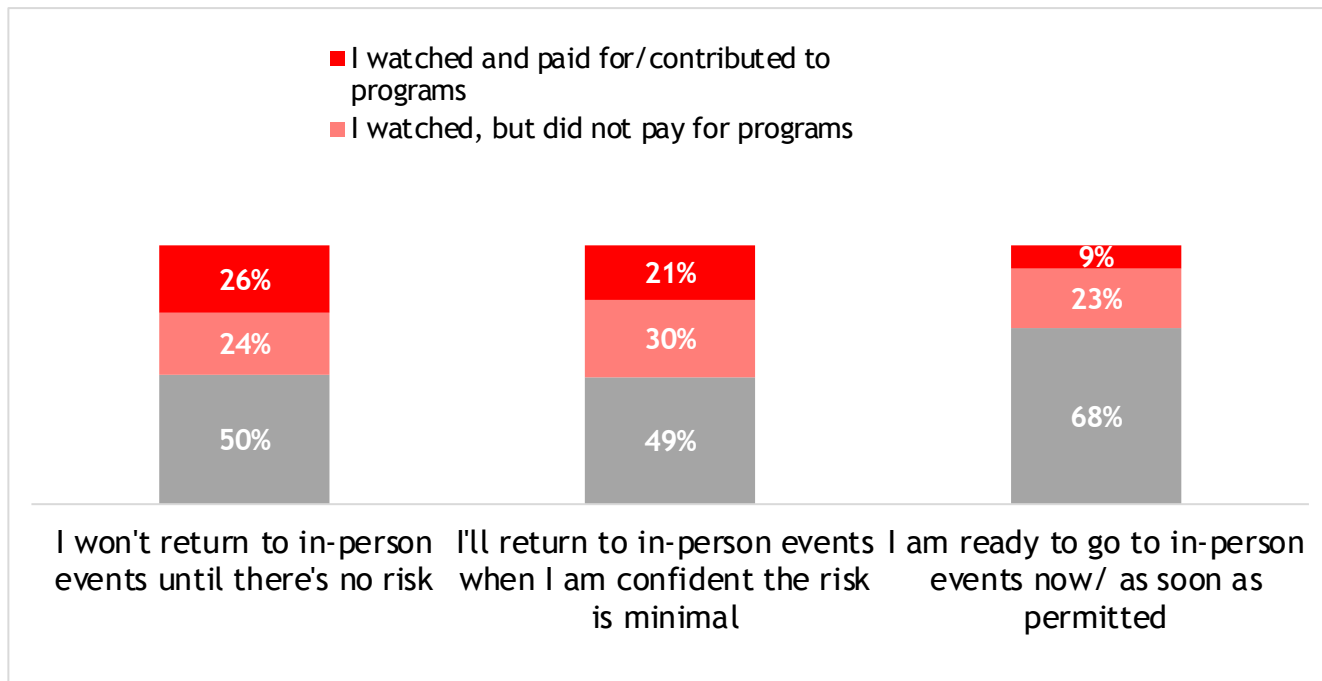
When will respondents return to in-person cultural events after being vaccinated?

- 45% After the recommended waiting period (typically several days to a week)
- 39% After I've seen how public adoption of the vaccine impacts infection rates
- 10% After I'm certain I've developed immunity
- 6% Only after health safety measures (masks, distancing) are no longer necessary

Digital Engagement Preferences

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

January 2021



Respondents who reported that they are ready to return to in-person arts and cultural events indicated lower levels of watching and paying for digital arts and cultural programs. When asked how they paid for these programs, paying a one time fee and making a one time donation in gratitude for the program were the two most common payment approaches.

What percentage of respondents reported high interest in watching the following types of online programs?

Did respondents indicate a preference for locally produced digital programs?

Live Streams

Theatrical Performances: 45%
Music Concerts: 50%
Museum Tours: 28%

On Demand Recordings

Theatrical Performances: 42%
Music Concerts: 39%
Museum Tours: 44%

No Preference

Theatre: 65%
Music: 69%
Visual Art: 63%

Preference for Local

Theatre: 27%
Music: 19%
Visual Art: 13%

On Demand Educational Programs

Theatre: 13%
Music: 12%
Visual Art: 48%

Episodes About an Artist Competition

Theatre: 8%
Music: 4%
Visual Art: 16%

Preference for National/Global

Theatre: 8%
Music: 13%
Visual Art: 25%