

AUDIENCE OUTLOOK MONITOR

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

Findings for Theatre Bay Area Cohort

Overview of Results: May 2021

In Partnership
with



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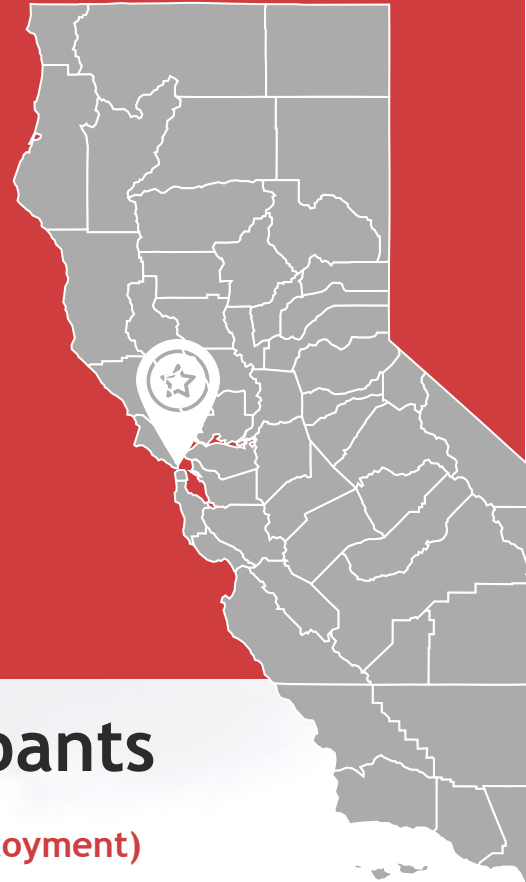
About the Study

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 second deployment, launched March 15, 2021, which generated approx. 2,600 completed surveys.



Phase 2 Cohort Participants

(Red Organizations Participated in May's Deployment)

- 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

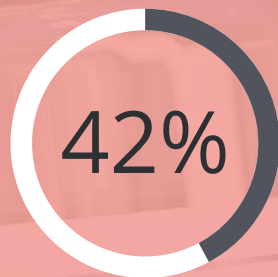


98%

Of respondents are partially or fully vaccinated

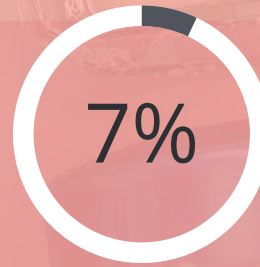
72% in March

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



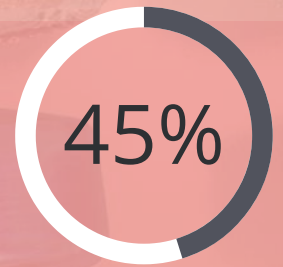
Ready Now

21% In March



Waiting for others in their network to get vaccinated

14% in March



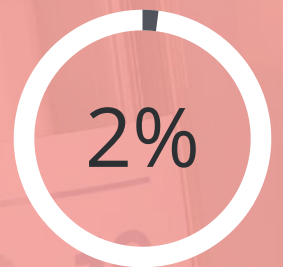
Waiting for low infection rates

54% In March



Waiting for safety measures to be removed

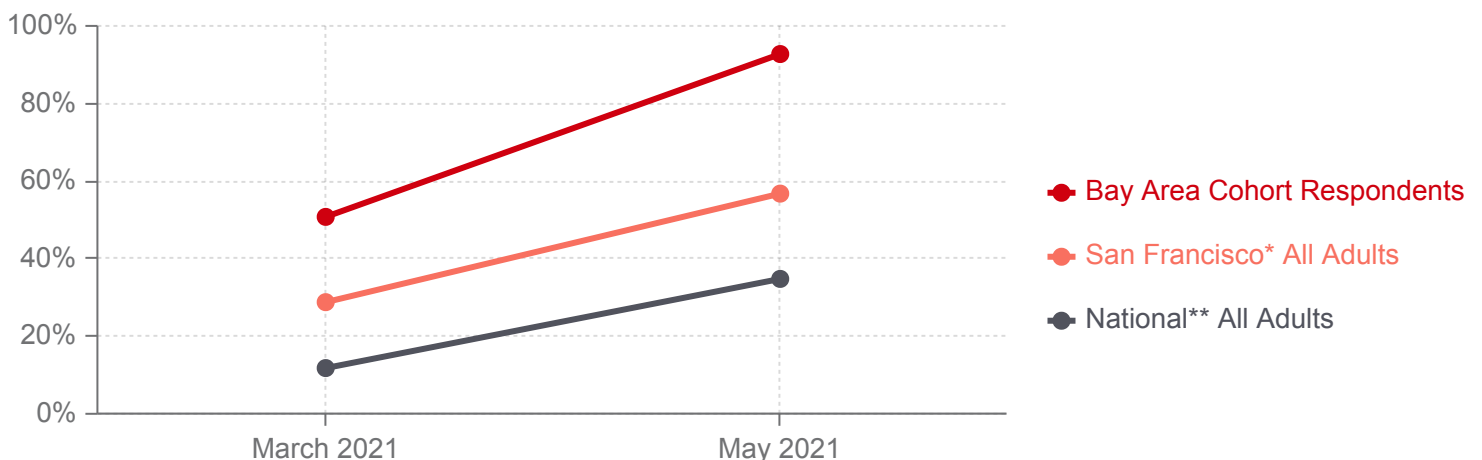
7% in March



Waiting to be certain of immunity

4% In March

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



* Visit the [DataSF](#) website by City & County of San Francisco for vaccine data.

** Visit the [Center for Disease Control and Prevention](#) website for national vaccine data.

Returning to In-Person Programs

Indoor Events with Distancing & Safety Measures

43%

Of respondents would attend an indoor event with masks and social distancing given the opportunity

22% of respondents would still attend without distancing but with masks

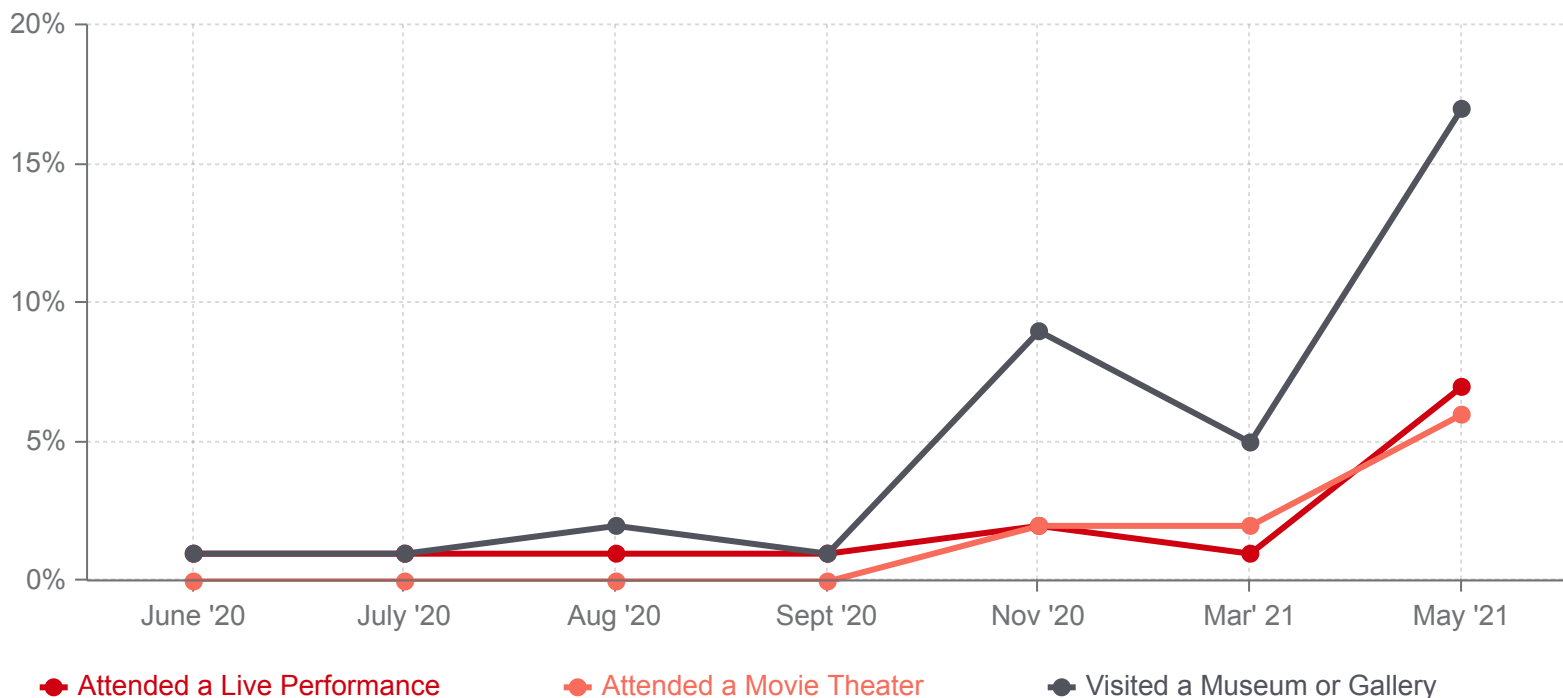
Outdoor Events with Distancing & Safety Measures

82%

Of respondents would attend an outdoor event with masks and social distancing given the opportunity

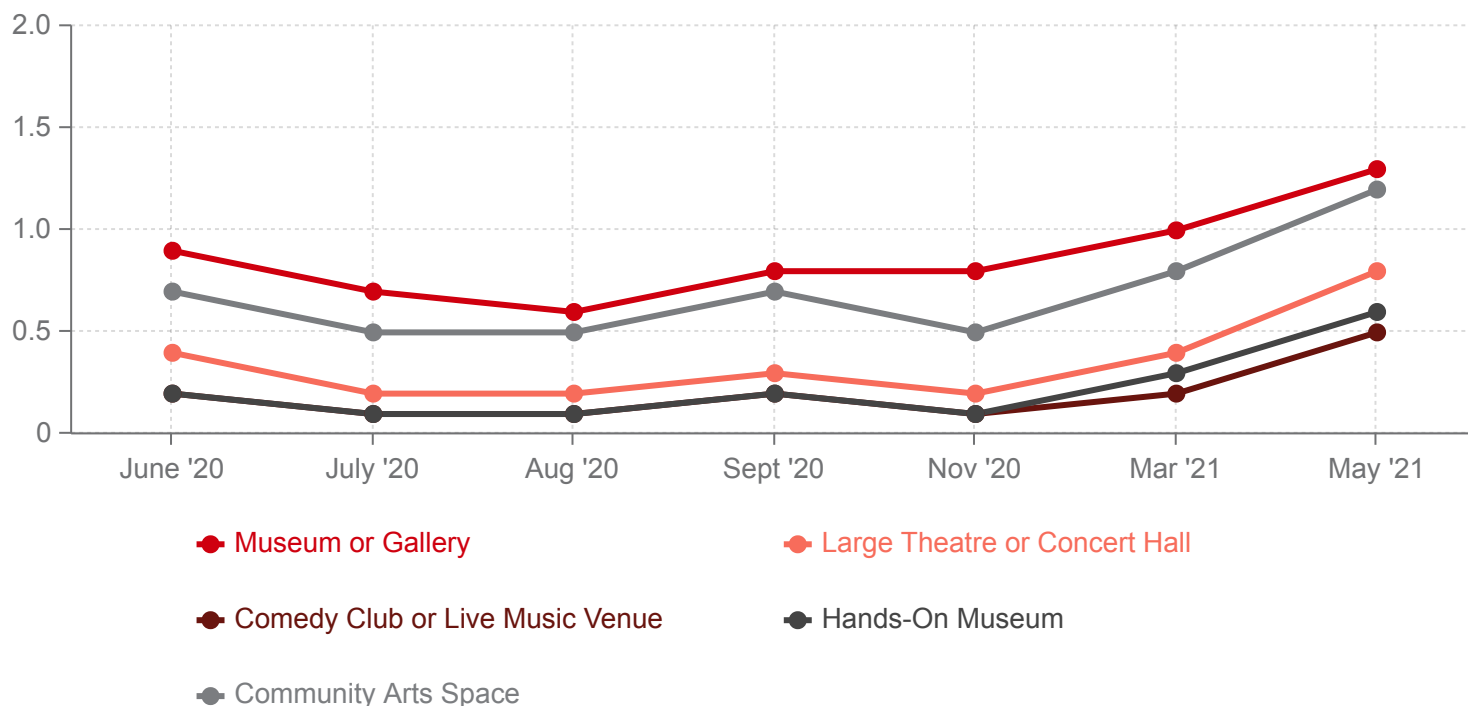
42% of respondents would still attend without distancing but with masks

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



Comfort Level Attending Different Cultural Facilities

0 = Not Comfortable and 2 = Very Comfortable



When thinking about returning to the sending organization in person, what health-related topics are most important to respondents?

#1

Ventilation

#2

Distancing

#3

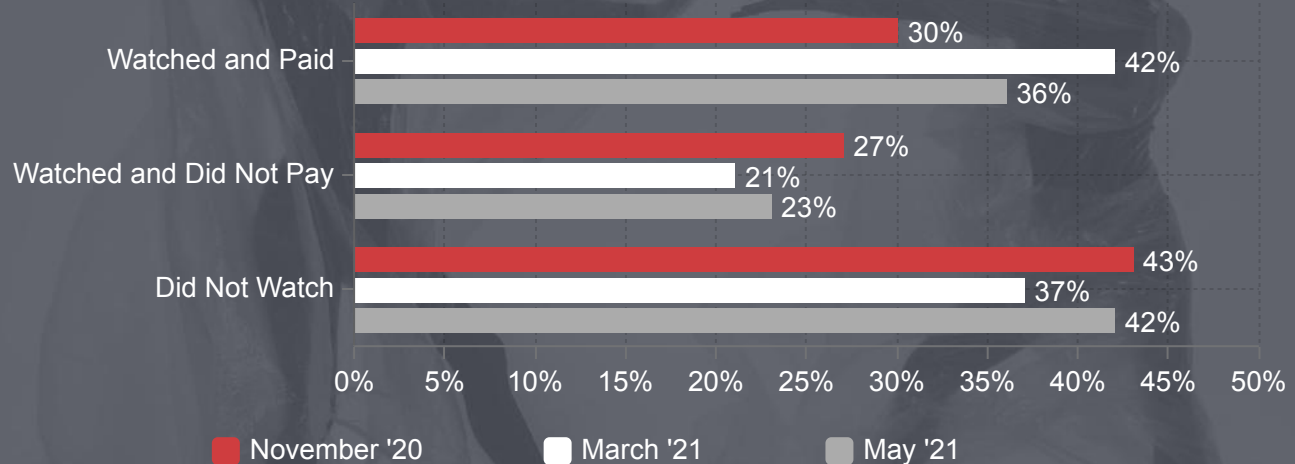
Mask Wearing

"Training of staff in the event a patron refuses to follow safety protocols. I've seen too many organizations' management teams cave to highly vocal/abusive people who refuse to mask, wash their hands or follow proper social distancing guidelines."

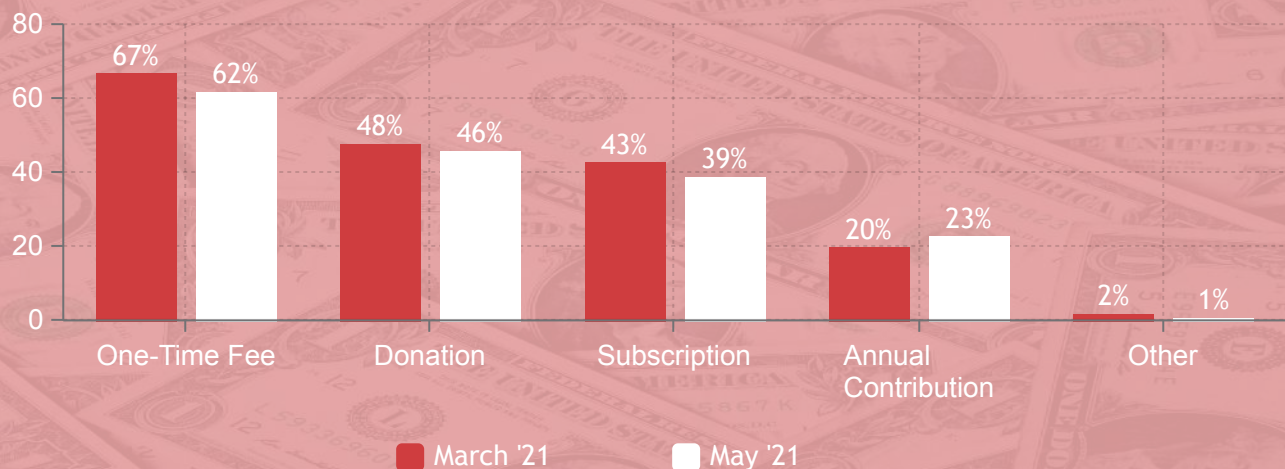
"That you engage in conscious decision making; that you are able to achieve a healthy balance of appropriate measures on behalf of performers, staff and audience; that you don't feel compelled to over react to the daily onslaught of conflicting information, but rather will maintain balance and transparency in explaining the basis for your protocols."

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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