

COVID-19 IMPACT SURVEY | JANUARY 2021

THE PATRONS' PERSPECTIVE:

An Overview of Buying Behavior and a Timeline to Return to Theaters

UNOBSTRUCTED
YOUR VIEW ON THE LIVE EVENTS INDUSTRY

PRESENTED BY:

AudienceView

THEATERMANIA

ABOUT UNOBSTRUCTED

At AudienceView, we understand what it's like to have an obstructed seat at an event. This can extend into our day-to-day lives, when you have only some information or a partial view into what's going on around you. Unobstructed was launched to resolve this issue for you when it comes to the live events industry.

We are excited to positively impact the professionals who work behind the scenes in live events to ensure that, over the long term, the show will always go on. We aim to inform, engage and educate the industry that we love.

With Unobstructed, we pay homage to live events professionals and others who work in all aspects of entertainment. We bring you subject matter experts, innovative ideas and market trends that we are in a unique position to share.

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Executive Summary

In response to the global COVID-19 pandemic, TheaterMania (an AudienceView consumer brand) **surveyed more than 3,300 members** of their online community to understand how this on-going health crisis is impacting their behavior and consumption of performing arts.

Generated from the survey results, this report will assist arts organizations of all sizes in driving revenue during our industry intermission and with their preparations for the reopening of theaters.

The report* aims to uncover the new behaviors of theater-goers, including opinions of the safety protocols that make patrons most comfortable, motivations and timelines to return to theaters, near-term spending intent, propensity to pay for virtual events, plus pricing information in support of lost revenue caused by reduced capacity.

Insights Inside:



Results from our survey of 3,300+ members of the most avid theater-going community.



Safety measures and protocols that will make arts patrons more likely to return to the theater.



Near-term spending intent, including ticket sales, donations and refund protection.



Virtual events: Recent consumption, propensity to pay and appetite for streaming content.

** This is a follow-up to the survey that was conducted in May 2020. We invite you to read the findings in this report – The Patrons' Perspective: An Overview of the Impact of COVID-19 on the Behavior of Theater-goers.*

BACKGROUND & METHODOLOGY

In order to better understand the patrons' perspective on returning to the theater, members of TheaterMania's community were invited to participate in a survey via email.

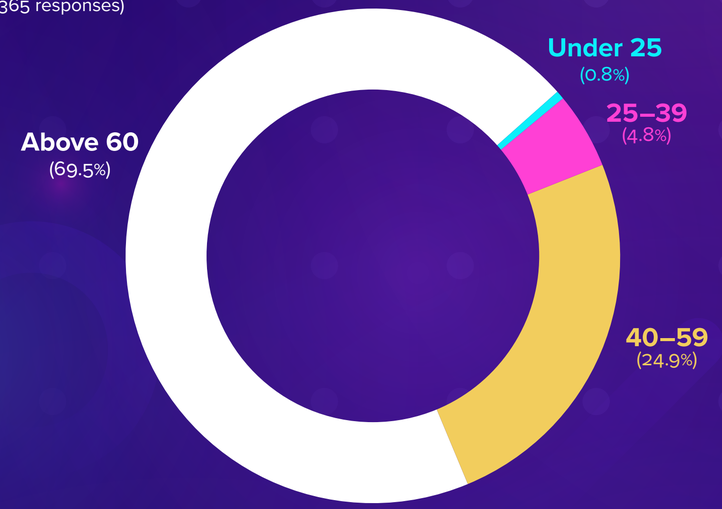
This survey of 3,300+ arts patrons in the United States, which took approximately seven minutes to complete, was carried out over an 14-day period from November 25 – December 8, 2020.

TheaterMania's audience represents the most avid theater-going demographic available online.

Nearly 94% of respondents went to the theater two or more times per year before the COVID-19 shutdown.

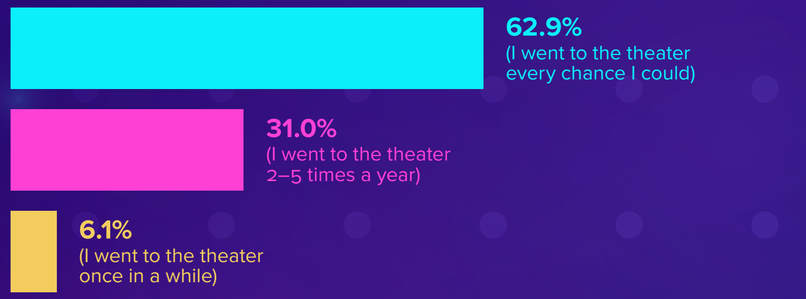
AGE BREAKDOWN

WHAT IS YOUR AGE?
(3,365 responses)



RESPONDENT PROFILE

BEFORE THE COVID-19 CRISIS, HOW AVID A THEATERGOER WERE YOU?



Key Learnings

VIRTUAL EVENTS

- People that watched live streaming content overwhelmingly enjoyed it, with less than 3% self-reporting as detractors.
- More people are paying for virtual events – 35.5% of respondents in this survey versus 26.4% in May 2020.
- The top device of choice for watching streaming content was a computer for all four age segments.

HEALTH & SAFETY PROTOCOLS

- Respondents overwhelmingly selected a vaccine as the most important safety protocol in terms of what will make them most comfortable attending a theater event.
- Nearly 70% of respondents shared that they will feel comfortable attending indoor theater performances by June 2021, with the remainder selecting 2022 (29.1%) and 2023 or beyond (1.5%).
- More than ¼ of those surveyed indicated that the protective measures taken by venues are a big factor in making a decision to attend both indoor and outdoor events.
- For many theater-goers, it's not enough to have a mandatory mask policy – patrons want the policy to be strictly enforced and offenders to be removed from the venue.
- Temperature checks and additional testing were not viewed as important safety protocols due to asymptomatic carriers and false-negative tests.

BUYING BEHAVIOR

- The majority of theater-goers (78.1%) are willing to pay more for tickets to help offset lost revenue due to physical distancing and capacity restrictions.
- Although only 13.3% of those surveyed are purchasing tickets now for live events in the future, 78.6% indicated that they plan on paying for virtual events or streaming content in the next six months.
- People want to support the arts! Nearly 70% of respondents have made a donation to a theater or related organization that supports the industry since the COVID-19 shutdown in March.
- More flexible refund policies will be an important factor in people booking tickets well in advance, with 30% of people likely to pay for refund protection and others outright refusing to do business with arts organizations that have a no refund policy.


VIRTUAL events

Live Stream Viewing

HAVE YOU WATCHED ANY ONLINE STREAMING CONTENT SINCE THE COVID-19 CRISIS BEGAN (AROUND MARCH 13)?*

77.4% (Yes) **22.6%** (No)



OUR VIEW:

The adoption of live streaming by arts organizations, some experimenting for the first time, has pushed boundaries and removed stigmas. We are confident that streaming will live on post-COVID for many arts organizations that have had success because it makes their content available to a global audience.

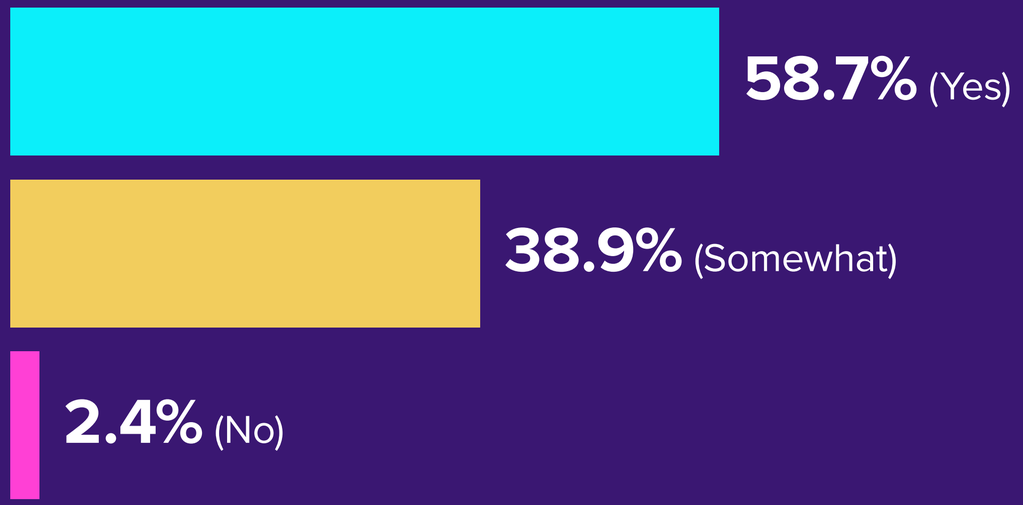
"I think online performances may be the only way to participate in theatre until the vaccine is delivered and fully embraced. So, that means that the theatre world needs to 'pivot' to modifying online performances to be as effective as television is now. Shorter, crisper and engaging."

Eleanor M. (New York, NY)

** Survey question asked specifically about content on platforms like YouTube and Vimeo, **NOT** on Netflix, Hulu, Prime Video, Disney+, Apple TV+ and other sites which stream films and television shows.*

VIEWING SATISFACTION

HAVE YOU ENJOYED WATCHING THESE VIRTUAL EVENTS / STREAMING CONTENT?



"The Irish Rep has done an excellent job and is a good example of how to do this!"

David M. (Lake Arrowhead, CA)

OUR VIEW:

The key is to get consumers to experience your virtual events! Focus on removing barriers to watch by experimenting with pricing, promotions and platforms.

LISTEN UP!

Patrick Brown, Director of Marketing at the Geffen Playhouse in Los Angeles, discussed how his organization created engaging remote experiences for their audience on Episode 23 of the Unobstructed podcast.

† *Results are from those respondents that indicated that they did watch online streaming content.*

PROPENSITY TO PAY

HAVE YOU PAID FOR VIRTUAL EVENTS / STREAMING CONTENT SINCE MARCH?

With a swift pivot to digital, the marketplace was flooded with free live streaming content early on in the pandemic – leaving consumers with little need to pay for performances. Nearly ⅔ (64.5%) of respondents indicated that they have paid for virtual events in this survey, compared to only 26.4% of those surveyed in May 2020.



"If you offer virtual viewing of productions, that would be a good option. Charge a reasonable price to view that evening's live production to help offset the loss of revenue from social distancing and give access to those not comfortable in public settings yet."

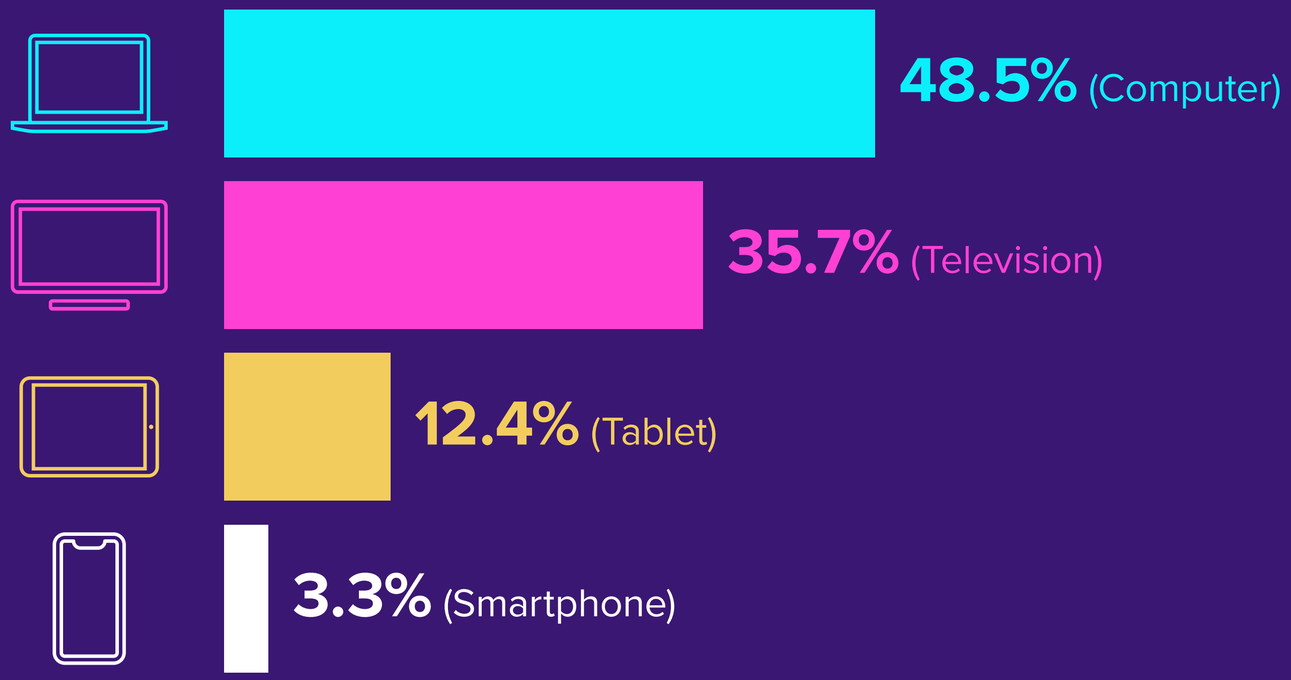
Sam C. (New York, NY)

† Results are from those respondents that indicated that they did watch online streaming content.

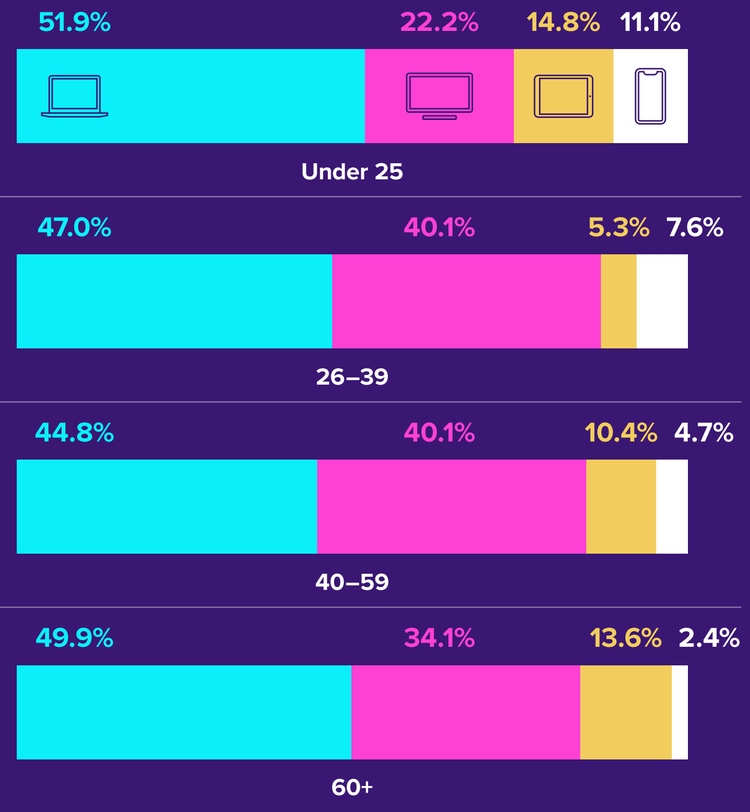
Left to your own devices

WHICH DEVICE DO YOU USUALLY WATCH THIS STREAMING CONTENT ON?

The top devices of choice for all four age segments were a computer and television, respectively. The Under 25 segment was the most device diverse group.



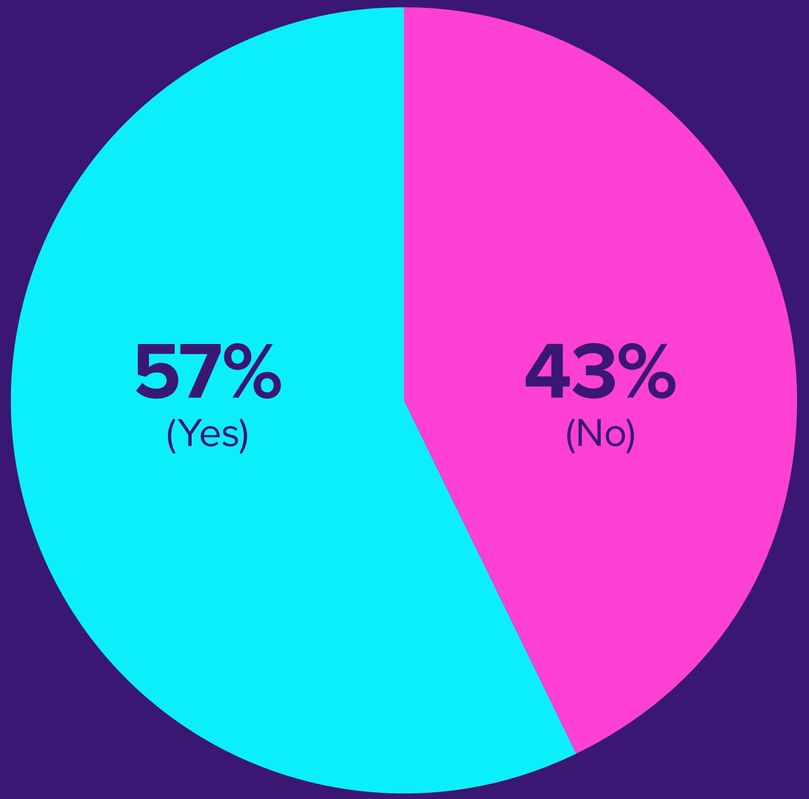
Age Breakdown of Device Choice



† *Results are from those respondents that indicated that they did watch online streaming content.*

DIGITAL STREAMING ADOPTION

SINCE BEING "HOME," HAVE YOU SUBSCRIBED TO ANY DIGITAL STREAMING SERVICES?



Of those that subscribed to digital services since March, the most popular were:

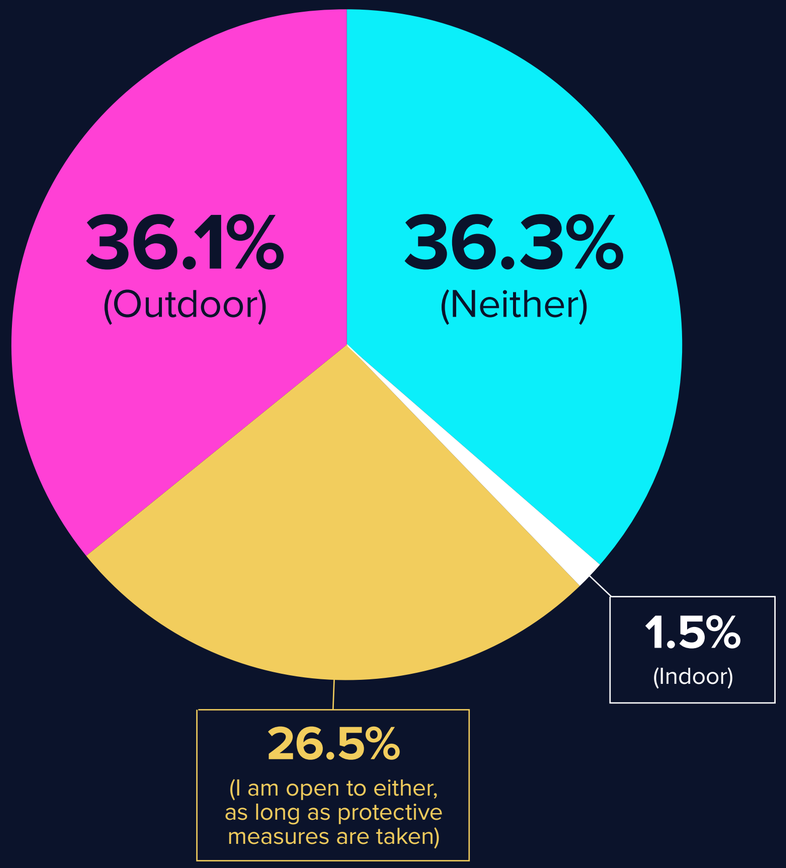
Netflix – 69.0%
Amazon Prime – 60.7%
Disney+ – 55.0%
Hulu – 39.3%
AppleTV – 25.2%

† Results are from those respondents that indicated that they did watch online streaming content.


Returning
to the Theater

LOCATION, LOCATION, LOCATION

CURRENTLY, DO YOU FEEL SAFER ATTENDING INDOOR OR OUTDOOR EVENTS?



OUR VIEW:

More than ¼ of the respondents indicated that protective measures are a big factor in attending events, regardless of location. It's critical to focus on these patrons to ensure that you are implementing the right safety protocols, sharing them widely and enforcing them.

"Mask policies must be enforced. Too often, people enter a space that requires a mask and then pull it down under their nose. Then the management does nothing, leaving other patrons in an awkward position. I would be hesitant to attend an indoor performance because once the lights are down, I'm sure many people would pull their masks down and nobody would say anything."

Stephanie O. (Jackson Heights, NY)

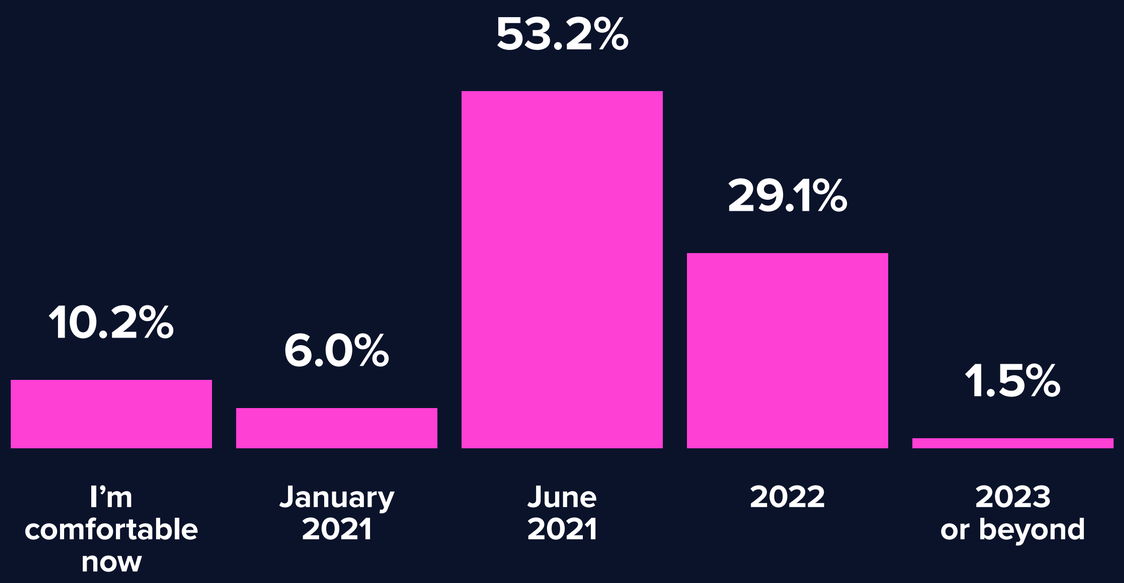
"Focus on improving or enhancing outdoor venues — indoor theatres aren't going to feel safe for a while."

Jeff M. (Los Angeles, CA)

TIME WILL TELL

IF ALLOWED BY YOUR STATE OR LOCAL GOVERNMENT, WHEN WILL YOU FEEL COMFORTABLE ATTENDING INDOOR THEATER PERFORMANCES?

Nearly 70% of arts patrons indicated that they will feel comfortable attending indoor theater performances by June 2021.



"I'm good to go right now!"

Mike M. (Belmont, MA)

"I think that live performances can begin soon with mask wearing, some staggering of entry/exit and good ventilation. And I applaud all the efforts to provide content that has uplifted everyone's lives! Theater is so necessary!"

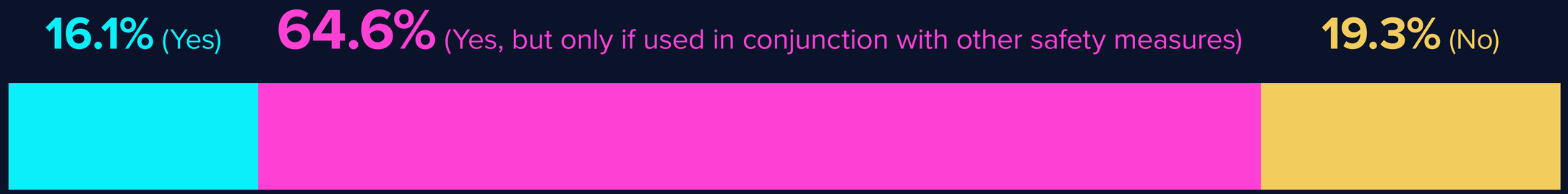
Rosemary H. (New York, NY)

"Hopefully a vaccine will be widely available by the spring, in time for theatres to reopen in June! Hoping for that!"

Michael D. (Brooklyn, NY)

POP QUIZ

ONCE AN APPROVED AND EFFECTIVE RAPID TEST IS IN PLACE, WILL YOU BE MORE OPEN TO ATTENDING LIVE EVENTS?





OUR VIEW:

Rapid tests alone are not enough to make people feel safe, so make sure your organization is putting other safety protocols in place.

“Rapid testing, mask mandate and staggered entry/exit is what will get me back in a theatre ASAP!”

Lindsay R. (Imperial, PA)

#MASKUP

WOULD YOU ATTEND AN EVENT THAT DOESN'T REQUIRE PATRONS TO WEAR MASKS?

6.5% (Yes)

93.5% (No)



OUR VIEW:

For many theater-goers, it's not enough to have a mandatory mask policy. Patrons want the policy to be strictly enforced and offenders to be removed.

"Safety first! Mandatory masks and distanced seating."

Nina G. (Los Angeles, CA)

"I would want it made clear that patrons who are not wearing their masks properly will be asked to leave without a refund. In other words, I would not be comfortable unless the mask mandate had some actual teeth."

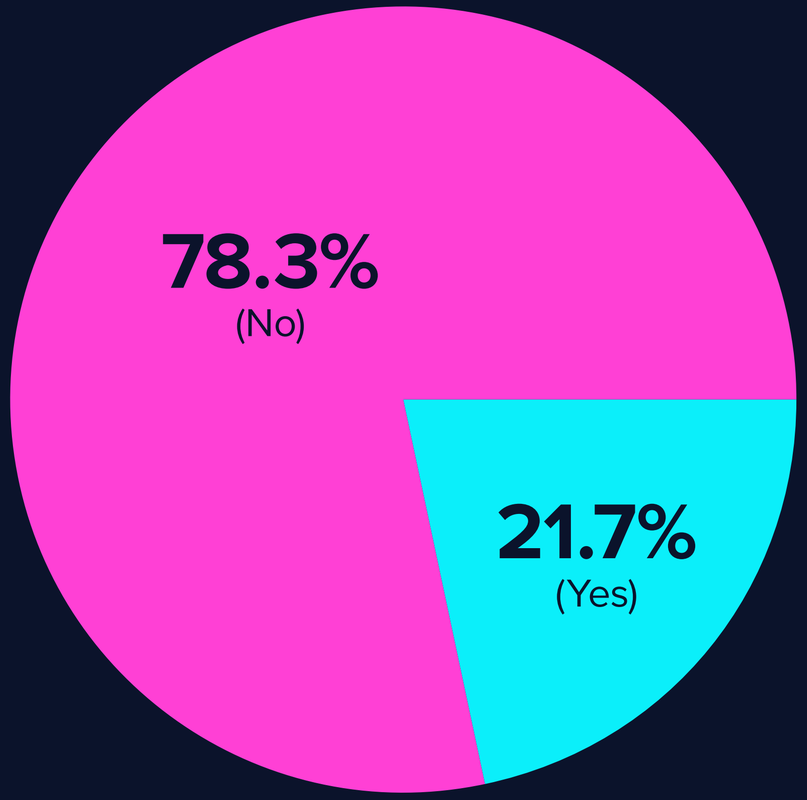
Maggie T. (New York, NY)

"They must enforce the PROPER wearing of masks at all times – covering both nose AND mouth."

Elizabeth C. (Brooklyn, NY)

NOT THROWIN' AWAY MY SHOT

WILL YOU ATTEND EVENTS BEFORE A VACCINE IS WIDELY AVAILABLE?



"I and many of our friends who are theater-goers (some are practicing Drs.) are not feeling secure until we have access to an effective vaccine for COVID-19."

Dr. Juan C. (Scarsdale, NY)

"I am super high risk for COVID. I miss theatre terribly, but will likely avoid it until vaccine efficacy and safety has been demonstrated."

Sue M. (Fremont, CA)

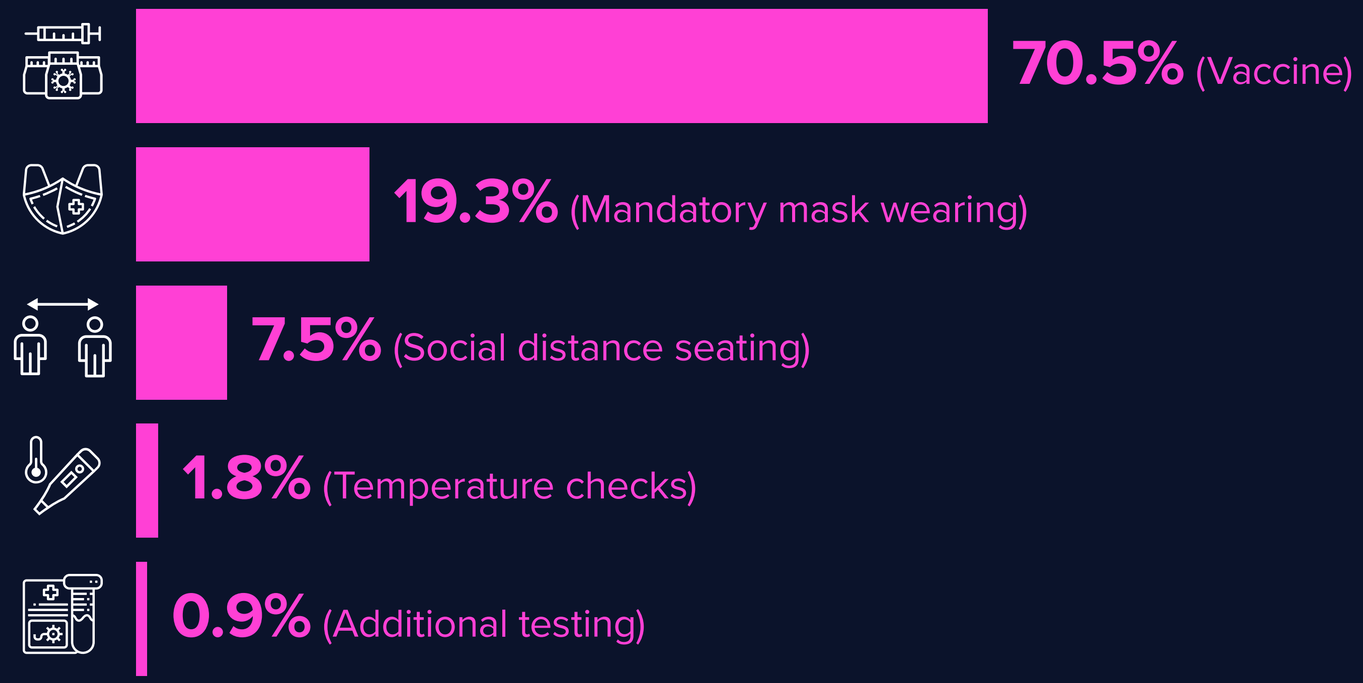
"I can't commit to returning to the theater until such time as a vaccine is in place and the population has been inoculated. Until then I will have to remain virtual."

Shelly W. (White Plains, MD)

SAFETY FIRST

RESPONDENTS WERE ASKED TO RANK THE FOLLOWING PROTOCOLS IN TERMS OF WHAT WILL MAKE THEM MOST COMFORTABLE ATTENDING A THEATER EVENT.

Breakdown of the safety protocol considered the most important of the items listed:



"It' s a terrible thing, but there is not much theaters can do until and unless a vaccine is widely available—for the safety of not just attendees but all the workers in the theater."

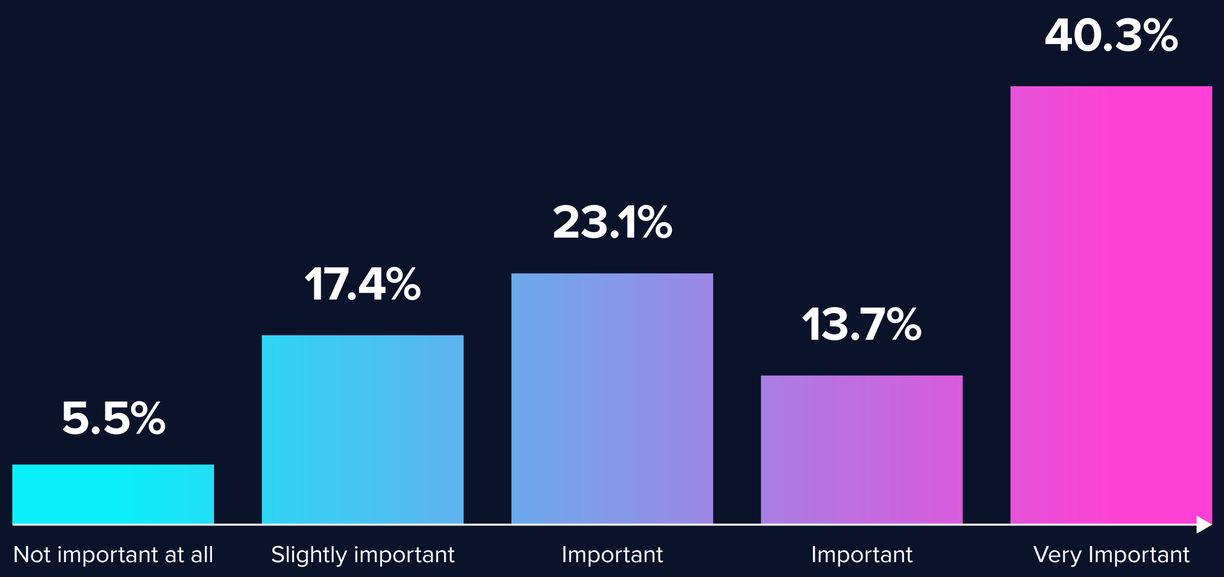
Hillary W. (Brooklyn, NY)

OUR VIEW:

41% of survey respondents selected mandatory mask wearing as their first or second most important safety protocol, so wearing a mask remains a very important factor in people's comfort level.

Hygiene Theater

HOW IMPORTANT IS IT TO YOU THAT THE THEATER YOU'RE ATTENDING PUBLISHES THEIR CLEANING PROCEDURES IN ADVANCE?



"Theaters should promote their social distancing and cleaning procedures."

Vincent C. (Temple Hills, MD)

OUR VIEW:

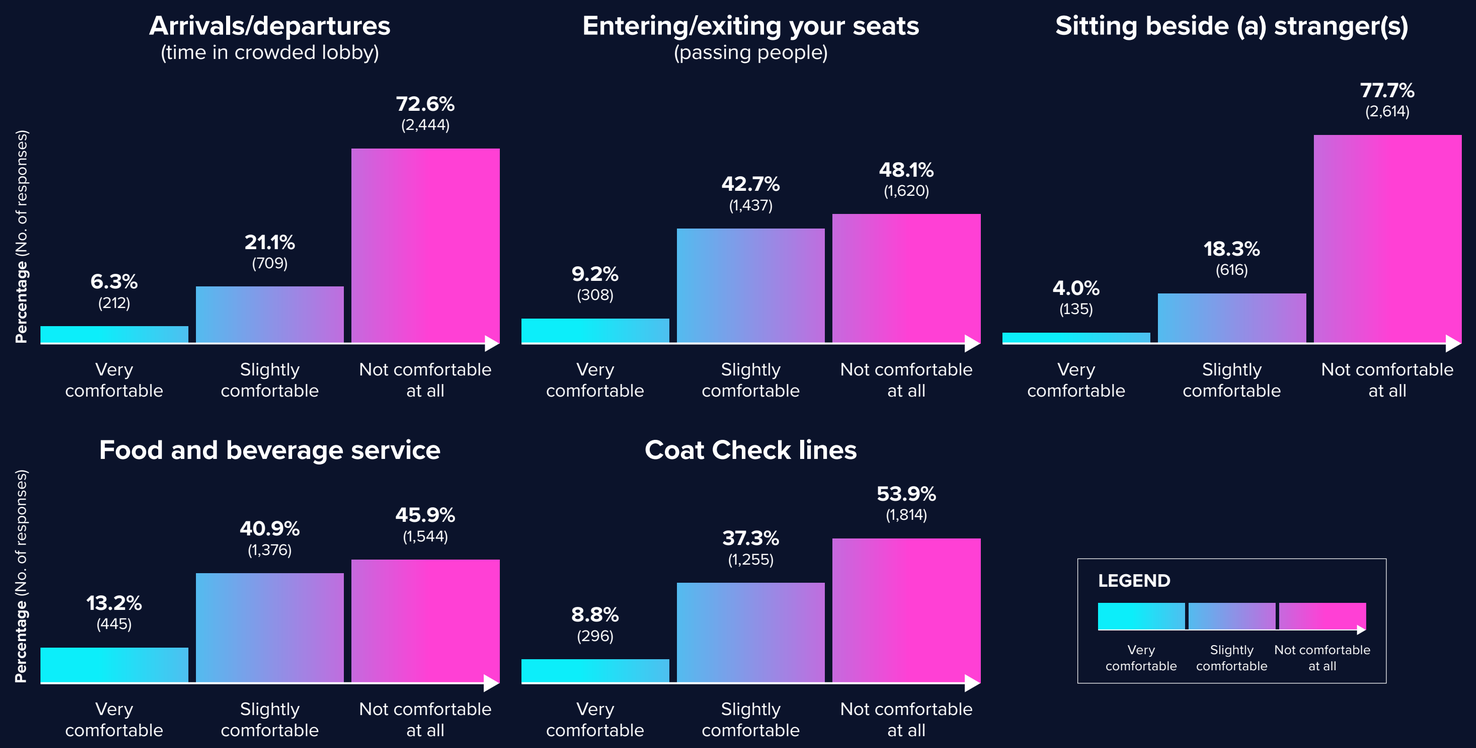
With 77.1% of respondents answering important (23.1%), fairly important (13.7%) or very important (40.3%), your organization should share your cleaning procedures on your website, social media channels and at your venue.

We have no doubt that many consumers will be making purchase decisions based on the events that they feel most safe attending. Your organization must put these protocols in place and then shout them from their stages.

Recommended reading: 8 ways that your organization can market the health-worthiness of your event or venue

COMFORT LEVEL

PLEASE SHARE YOUR COMFORT LEVEL WITH THE FOLLOWING ITEMS:



"Have assigned seats and have guests only enter one row at a time. And when the show is over, have the back row exit out first and continue on. We all need to respect each other because the SHOW MUST GO ON!"

Katina D. (Brockton, MA)

OUR VIEW:

Crowds and close proximity to fellow attendees makes people the most uncomfortable. Consider building in protocols to limit queues and the general crowding of patrons.



BUYING BEHAVIOR

Willingness to Help Offset Costs of Physical Distance Seating

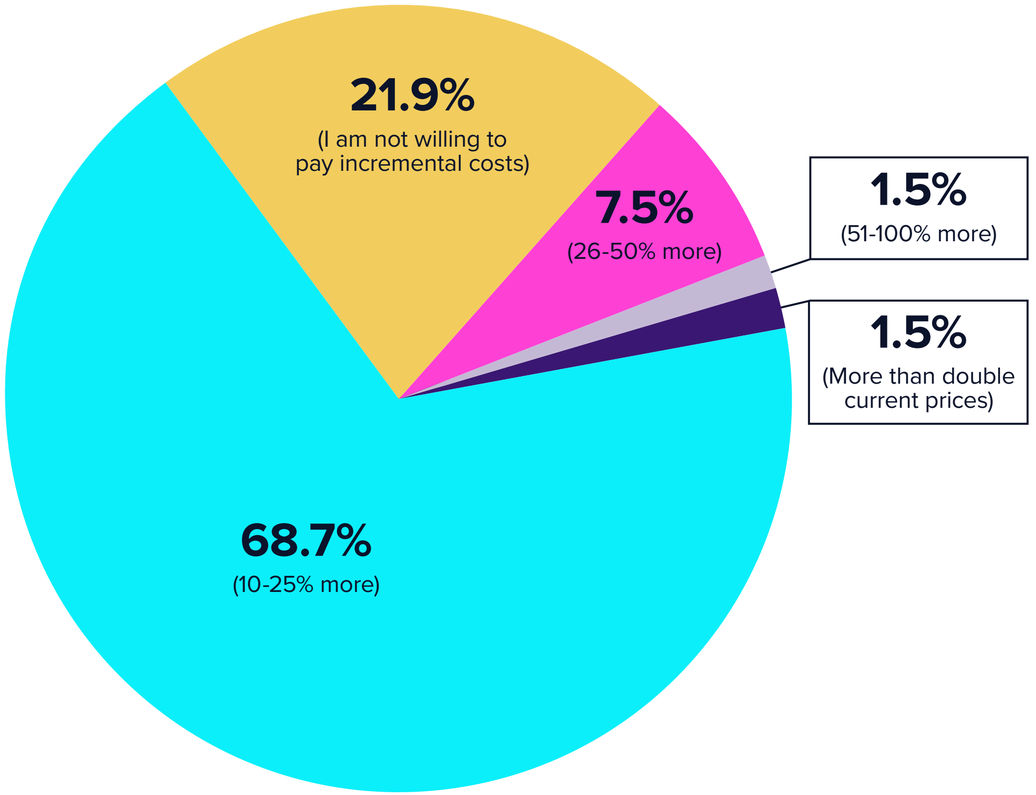
IF THEATERS HAD TO INCREASE THEIR TICKET PRICES TO OFFSET THE LOST REVENUE FROM PHYSICAL DISTANCING (EMPTY) SEATS, HOW MUCH EXTRA WOULD YOU BE WILLING TO PAY TO CONTINUE TO ATTEND SHOWS?

Listen Up!

Hannah Grannemann, Assistant Professor and Director of the Arts Administration Program at the University of North Carolina at Greensboro, encouraged arts organizations to experiment with pricing on episode 26 of the Unobstructed podcast.

Our View:

78.1% of patrons (up from 72.8% in our May survey) are willing to pay more for tickets to offset the revenue loss associated with new safety protocols. Arts organizations should experiment with an increase in ticket prices to help support the financial viability of reduced capacity caused by physical distance seating or government restrictions.



JUST BROWSING

13.3%

are actively purchasing tickets
now for **live events in the future**

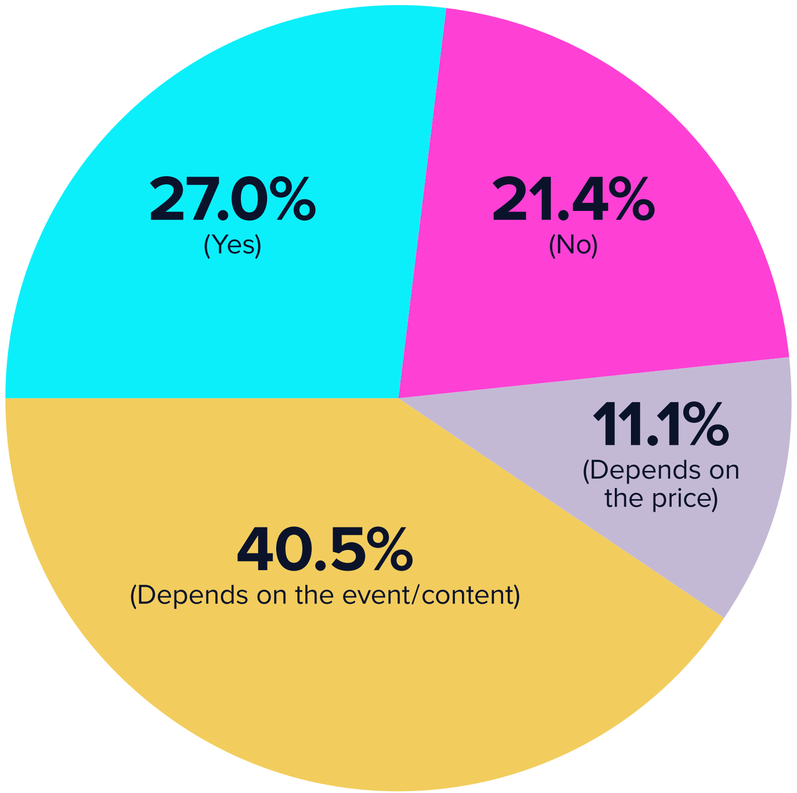


OUR VIEW:

Communication and transparency – specifically around safety protocols, refund policies and venue cleaning – are key to increasing buyer confidence, ultimately leading to advanced ticket sales.

ALL THE WORLD'S A STAGE

DO YOU PLAN ON BUYING TICKETS FOR VIRTUAL EVENTS / STREAMING CONTENT IN THE NEXT 6 MONTHS?



Recommended reading: Streamed Events on AudienceView

OUR VIEW:

While 78.6% of respondents plan on buying tickets to a virtual event in the next six months, content is still king! While it's important to continue to experiment with content, the virtual events you put on sale must be worth the price of admission. Arts organizations now have the opportunity to reach a global audience, but that comes with increased and intense competition from the world's stage.

DRIVIN' REVENUE WITH DRIVE-INS

Have you bought tickets to a drive-in event during the COVID-19 shutdown?

8.0% (Yes) **92.0%** (No)



If yes, did you enjoy the drive-in experience?

89.2% (Yes) **10.8%** (No)



OUR VIEW:

While a small percentage of respondents have bought a ticket to a drive-in event, those that have overwhelmingly enjoyed the experience. Explicitly ask your drive-in attendees to share their positive experience on social media and through word of mouth to help drive ticket sales.

"I'm not comfortable going to a show until there is a vaccine. Until then, theaters can do more virtual productions and drive-in theater."

Hope W. (Longmont, CO)

Refund Protection

ARE YOU LIKELY TO PAY FOR REFUND PROTECTION?

30.2% YES

“Be flexible with ticket sales and refunds. We all want to do what we can AND stay safe.”

Samantha K. (Staten Island, NY)

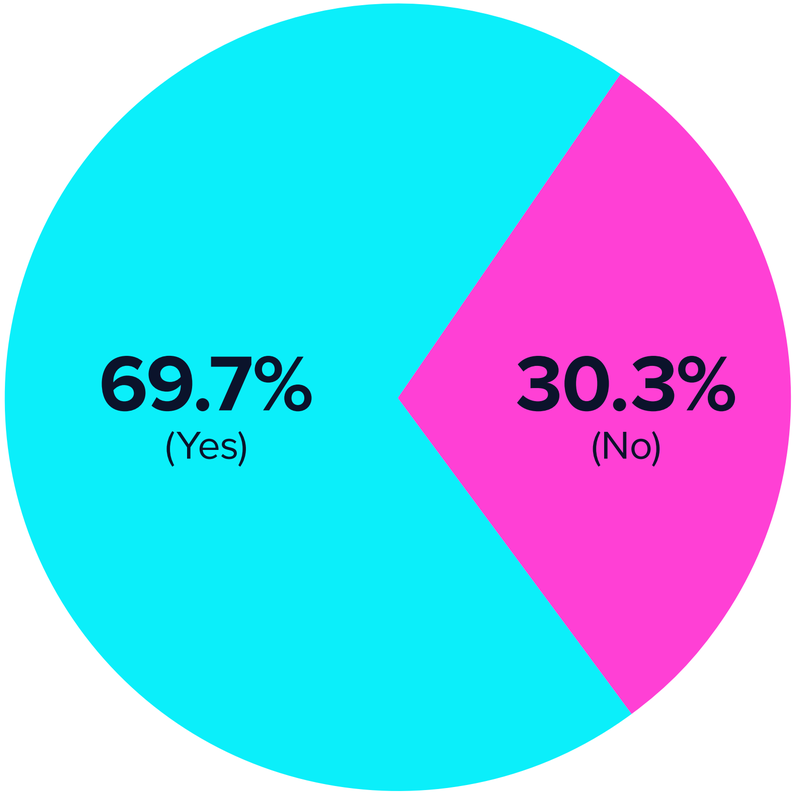
“To prevent sick people from showing up, refunds and exchanges should be offered to theater patrons if they are ill.”

Frances M. (East Brunswick, NJ)

Recommended reading: What is refund protection and how can it increase your revenue?

FUNDRAISING

HAVE YOU MADE A DONATION TO A THEATER OR RELATED ORGANIZATION THAT SUPPORTS THE INDUSTRY SINCE THE COVID-19 SHUTDOWN IN MARCH?



OUR VIEW:

People want to support the arts! Theaters that have nurtured relationships with donors, communicated effectively and best leveraged technology have had the most success with fundraising during this industry intermission. If your organization has struggled, your fundraising strategy should be reviewed and re-imagined.

Recommended reading: 11 Fundraising Best Practices When the Shows Can't Go On

CONCLUSION

AudienceView, in partnership with its consumer brands, is pleased to make the full results of this research available to the performing arts community on a complimentary basis. We look forward to hearing about how theaters use this information when developing their reopening timeline and operational plans.



Visit AudienceView.com/Unobstructed to listen to the Unobstructed podcast