

**AUDIENCE
OUTLOOK
MONITOR**

**International Highlights
& A Look Forward**

December 11, 2020

Alan Brown for NPU/Audiences Norway

22 National and International Study Cohorts, as of December 2020

US City/Regional Cohorts

- Detroit (multi-disciplinary cohort)
- Atlanta (multi-disciplinary cohort)
- Cincinnati (multi-disciplinary cohort)
- Boston (multi-disciplinary cohort)
- Chicago (multi-disciplinary cohort)
- San Francisco (multi-disciplinary cohort)
- New York City (Off-Broadway theatres)
- New York City (large institutions, multi-disciplinary)*
- Washington DC (multi-disciplinary cohort)*
- Los Angeles (Music Center resident companies)
- Los Angeles (small and mid-sized organizations serving diverse populations)
- Minneapolis/St. Paul and rural Minnesota (multi-disciplinary cohort)
- Pittsburgh (multi-disciplinary cohort)

US Disciplinary Cohorts

- Performing Arts Centers cohort (US national cohort)*
- University presenters cohort (US national cohort)*
- Theatre for Young Audiences (US national cohort)
- New Jersey and Connecticut theatres
- Orchestra cohort

International Cohorts

- **Norway (nationwide, multi-disciplinary cohort)**
- Australia (nationwide, multi-disciplinary cohort)
- Ontario, Canada (large, multi-disciplinary cohort)
- Canadian theatres cohort (national cohort)

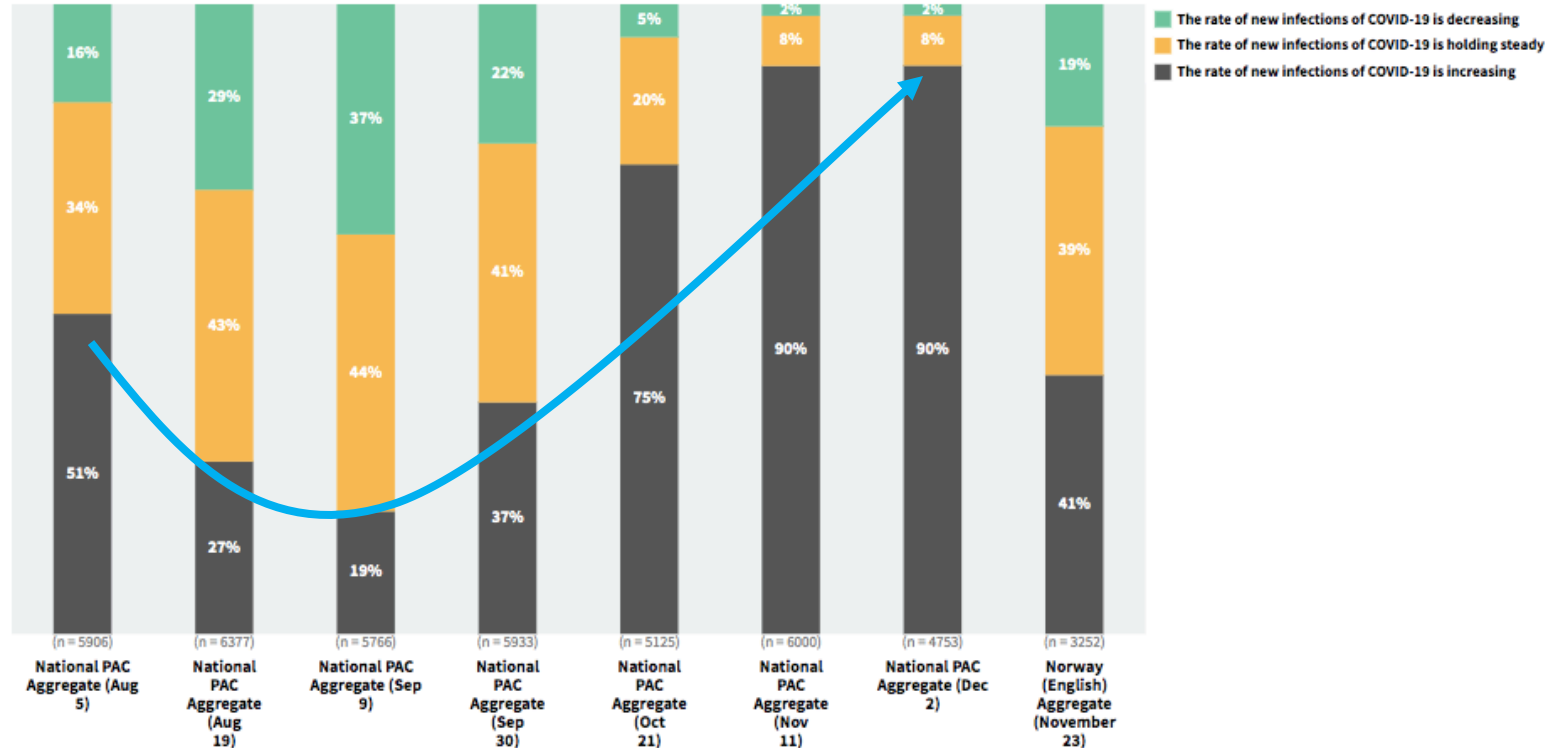
*managed in partnership with AMS Analytics



Perceptions of improving vs. worsening conditions have fallen sharply since September (source: Nat'l PAC cohort)

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

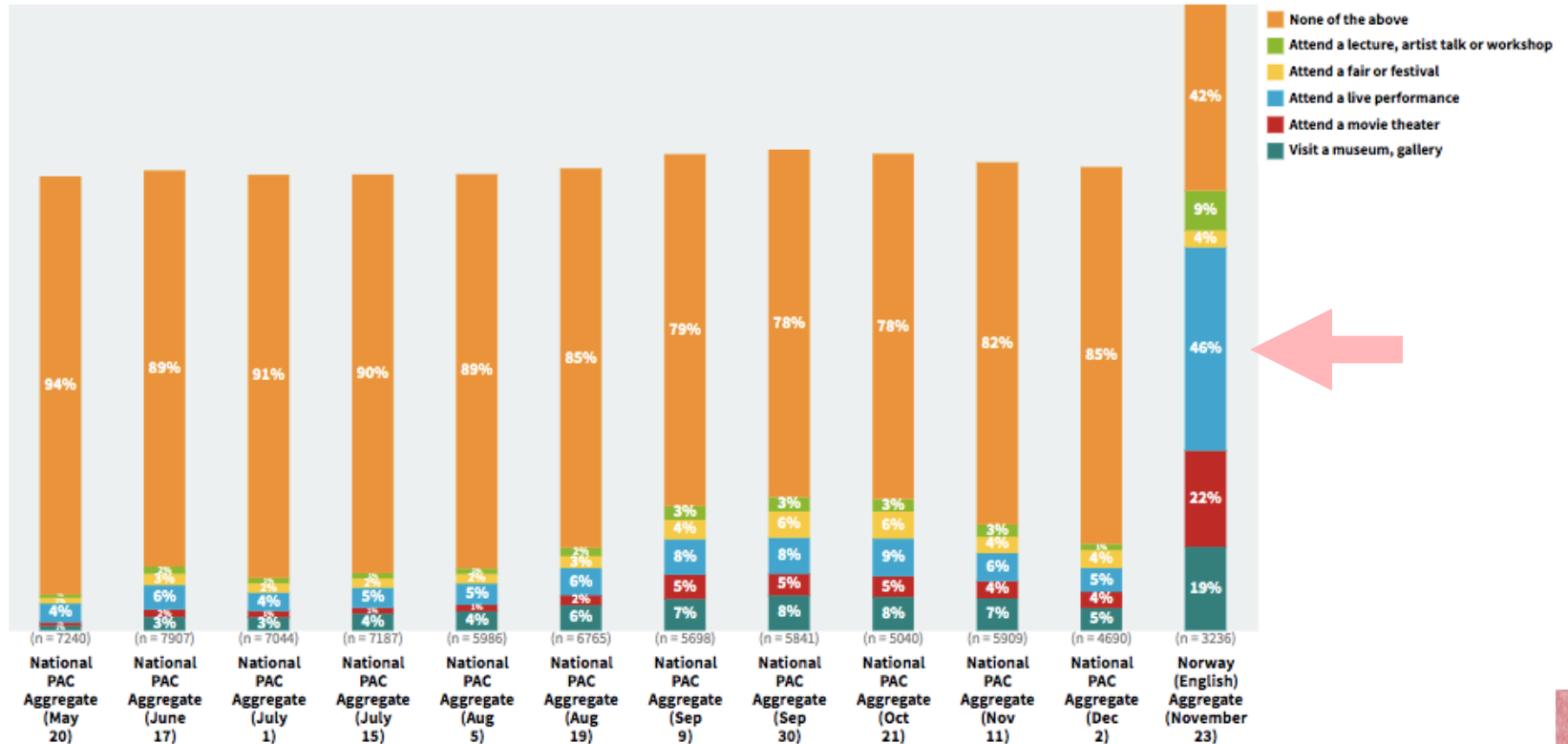
(Protocol Two Only)



Within the Nat'l PAC cohort, the upward trend in advance planning peaked in October, and then declined a bit. But we never got out of the single digits.

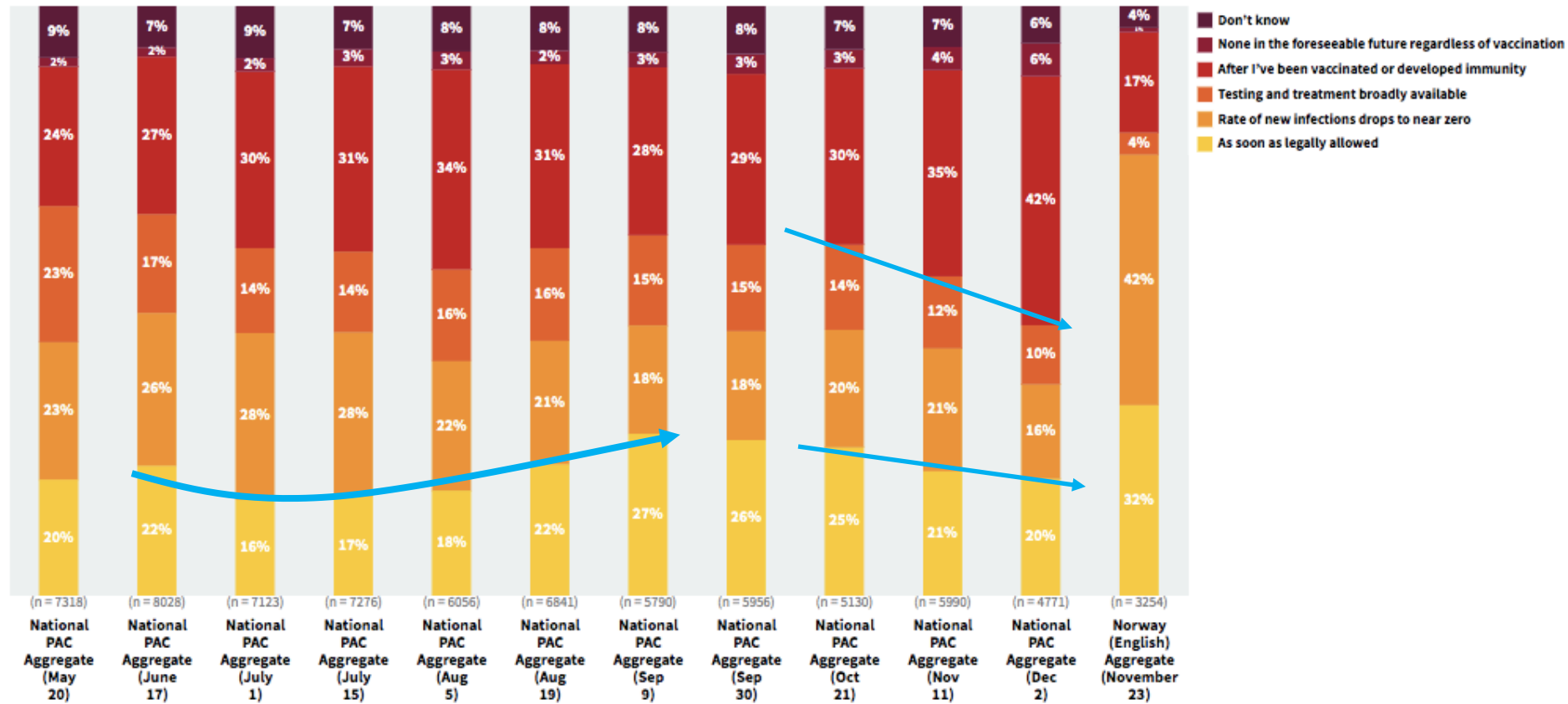
In the past two weeks, did you make firm plans to do any of the following activities outside the home, whether free or ticketed? (select multiple)

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



The percentage of respondents saying they're waiting for a vaccine dramatically increased in early December (source: Nat'l PAC cohort)

Under what conditions will you resume attending arts and cultural events?



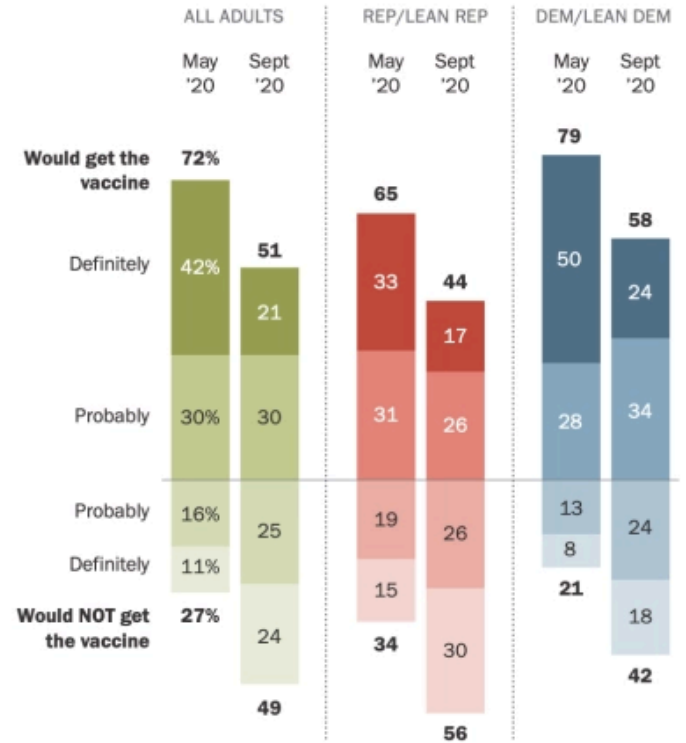
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Attitudes about vaccination

According to the Pew Research Center, 51% of Americans will take the vaccine (as of Sept.), down from 72% in May

Drop in share of Americans who say they would get a COVID-19 vaccine if it were available to them today

% of U.S. adults who say if a vaccine to prevent COVID-19 were available today, they ...



Note: Respondents who did not give an answer are not shown.

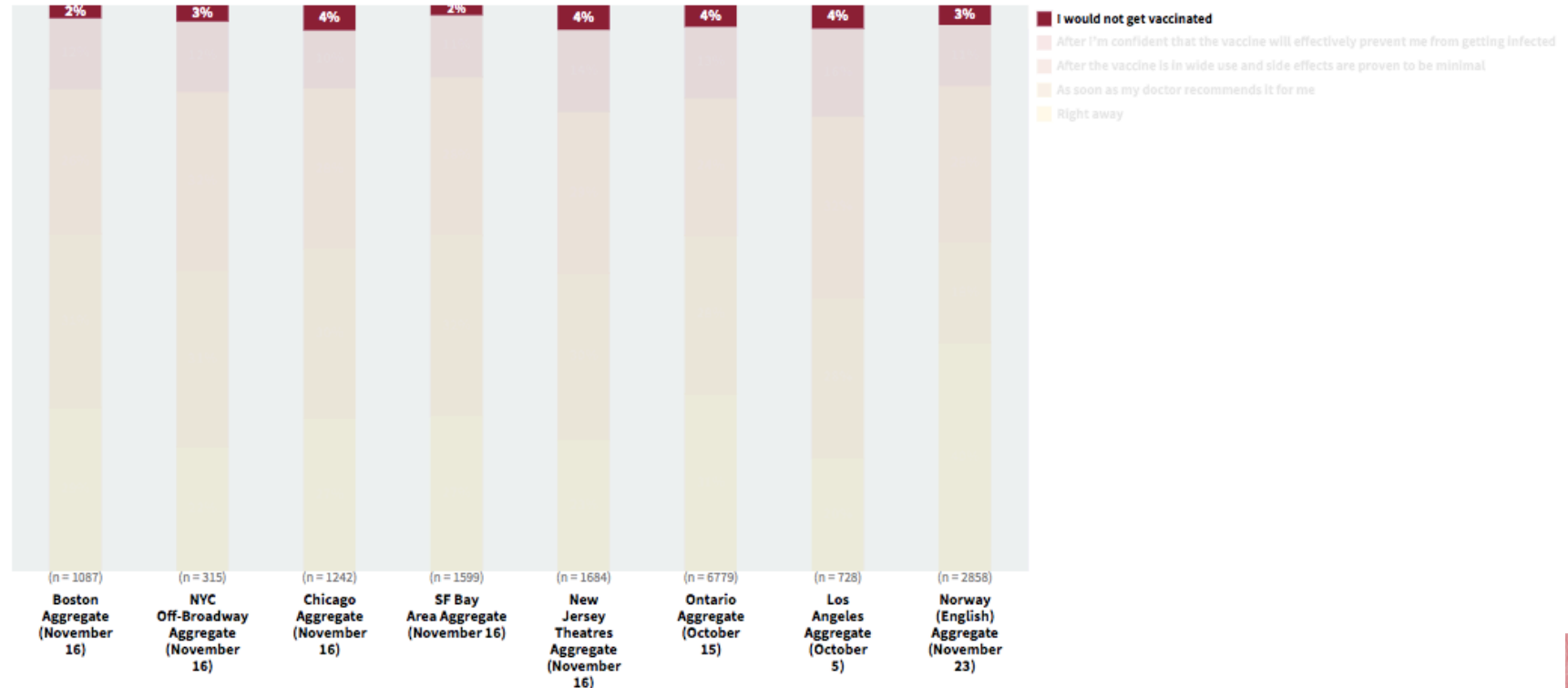
Source: Survey conducted Sept. 8-13, 2020.

"U.S. Public Now Divided Over Whether To Get COVID-19 Vaccine"

PEW RESEARCH CENTER

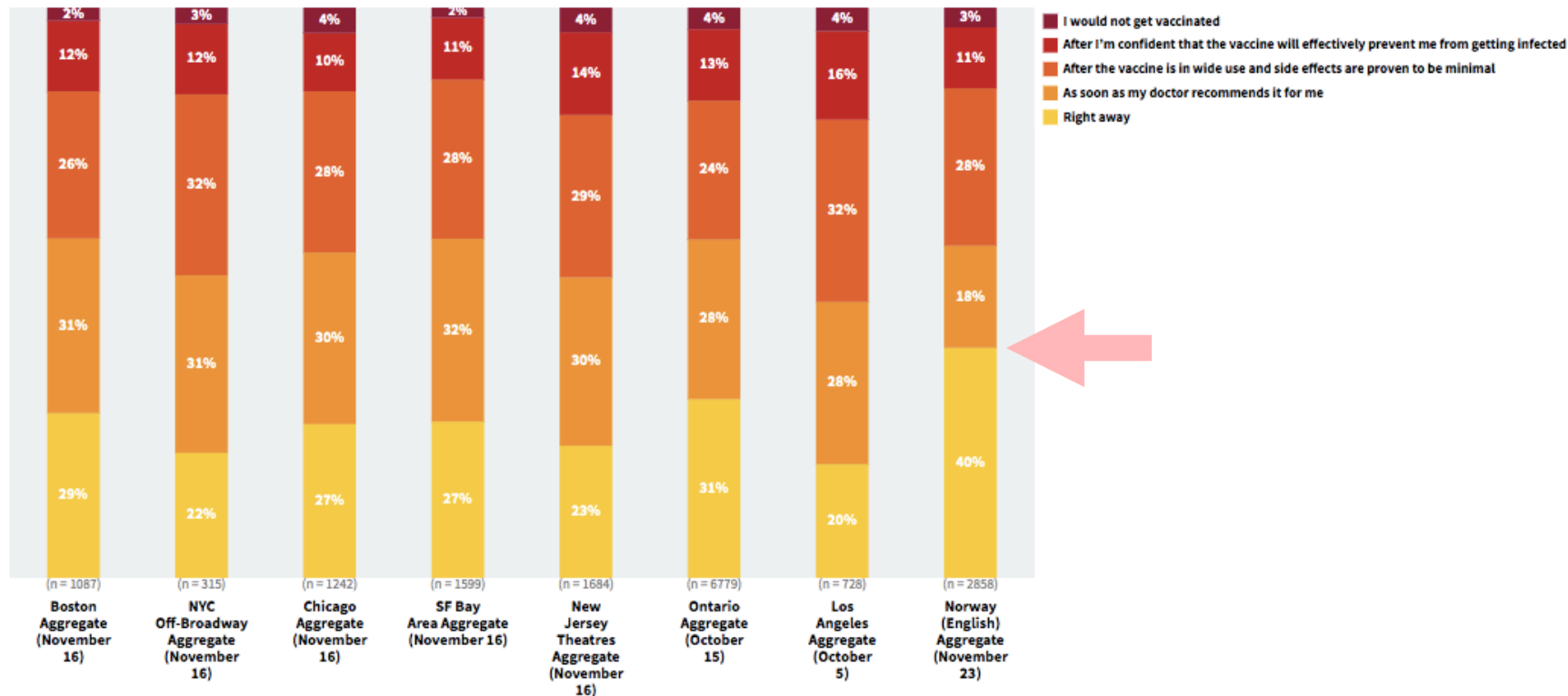
The (very) good news is that only 2% to 4% of arts patrons won't get vaccinated

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



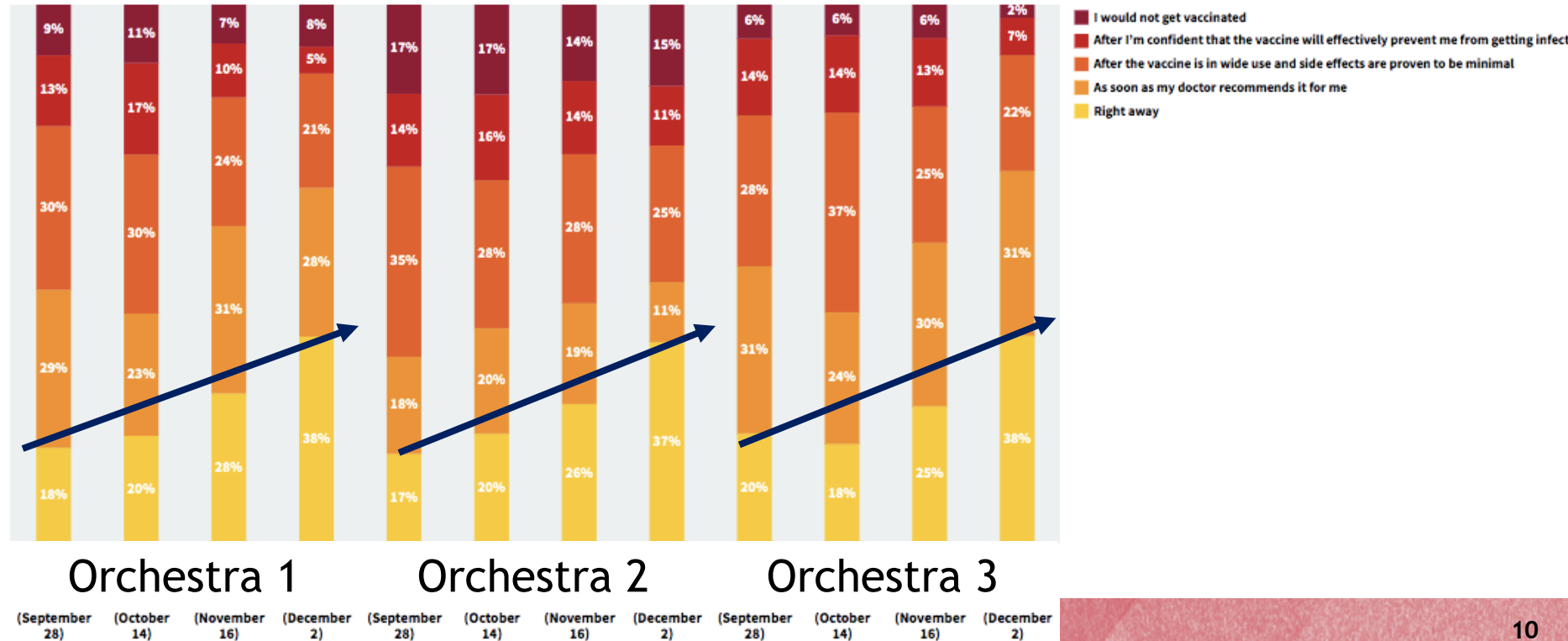
Norwegian audiences are more likely to get vaccinated right away, but some will wait

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

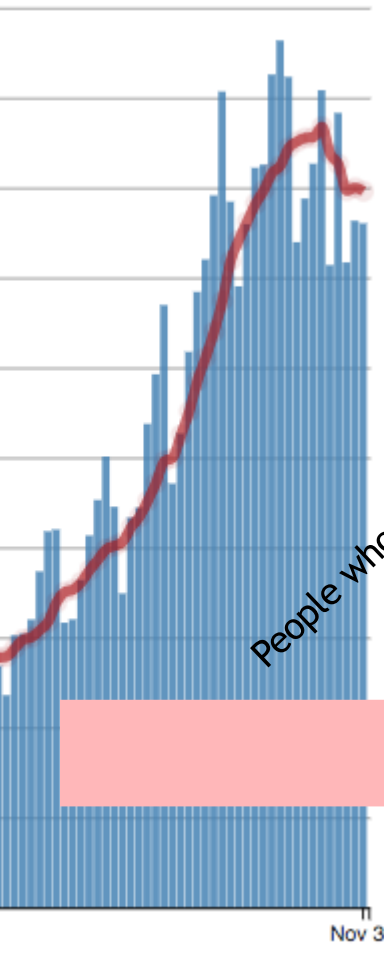


Attitudes about vaccination are changing rapidly; between Sept. 28 and Dec. 2 the percentage of respondents saying they'll get vaccinated "right away" doubled

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



The Covid-19 off-ramp comes into view...



People who'll go out ASAP without vaccine

People who'll get vaccinated and go out right away

People who'll get vaccinated and then wait for conditions to be met

People who'll wait to get vaccinated until conditions are met

People who may or may not get vaccinated but won't go out until there's no risk

Vaccine rolls out

What can the arts sector do to support the forthcoming public health challenge?



Elvis Presley receiving a polio shot in October 1956 from Assistant Commissioner Dr. Harold Fuerst. Commissioner Baumgartner holds Presley's arm while Fuerst administers the vaccine. Department of Health Collection, NYC Municipal Archives.