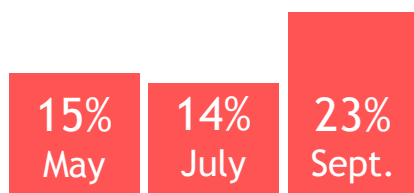


AUDIENCE OUTLOOK MONITOR

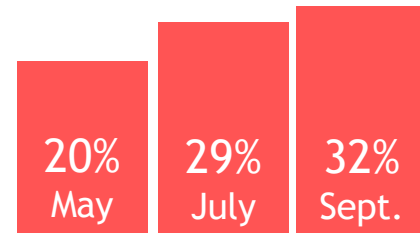
Metro Atlanta Update October 30th, 2020

This briefing represents survey responses collected from 8,982 Georgia arts & Culture attendees in May, July and September.

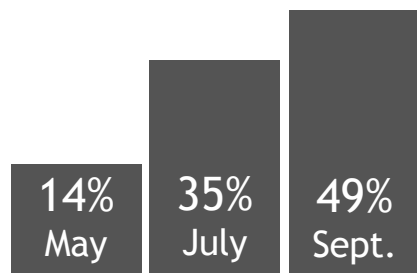
Key Indicators of Demand



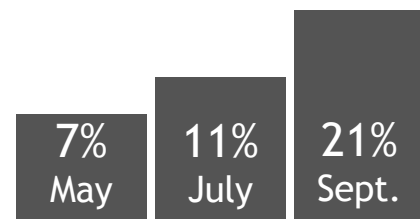
↑ Will resume attendance as soon as restrictions are lifted



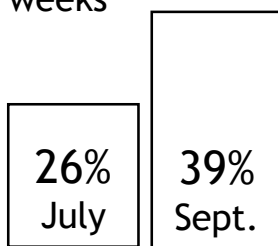
➔ Will not resume attendance until they receive vaccination or immunity



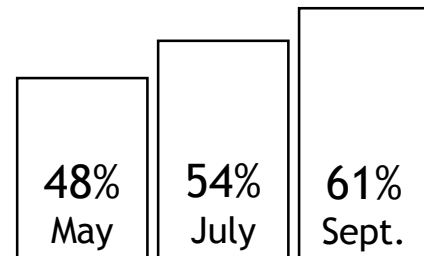
↑ Attended a restaurant or in-person cultural event in the past two weeks



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



↑ Trust other visitors/audience members to follow health safety rules



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

At a Glance

In September, we saw small increases in the percentage of respondents who reported being ready to attend in-person arts and cultural events as soon as it is permitted, who are making plans to attend in-person arts and cultural events, and who are attending in-person arts and cultural events. However, the majority of respondents continue to report that they are waiting for conditions to change and are still uncomfortable in some indoor venues.

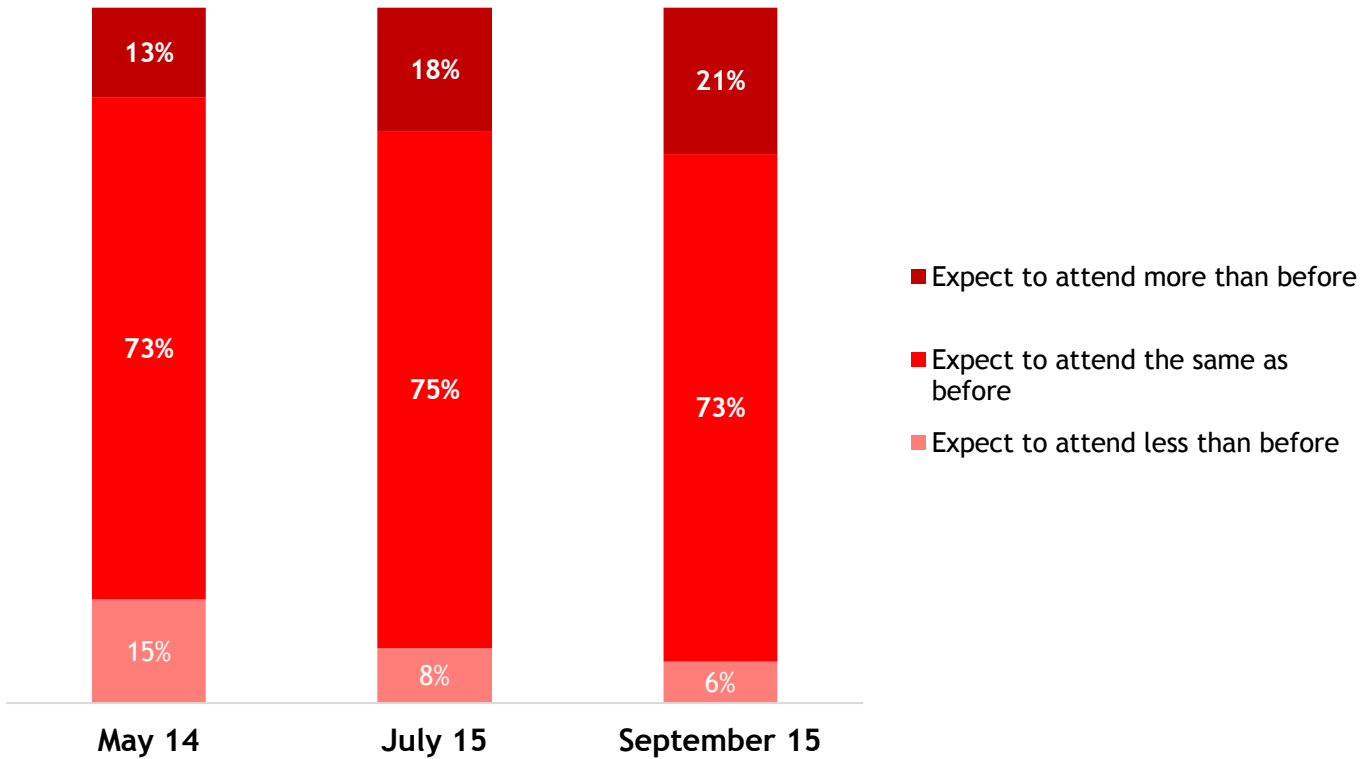
**Figures from May and July have been updated slightly*

This study is administered by WolfBrown and funded by the Arthur M. Blank Family Foundation.

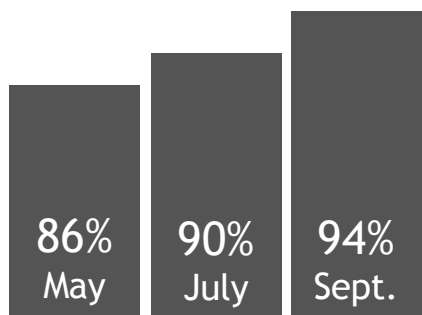
© WolfBrown 2020

Long Term Picture

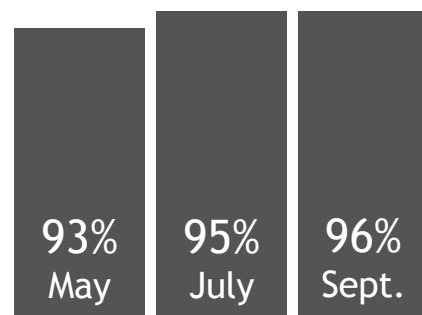
How will your attendance at arts and cultural activities be affected by the pandemic in the long-term, given your personal circumstances?



We are also seeing eagerness to return increase. In May, 42% of respondents were very eager to return to the sending organization. In July, 57% reported being very eager to return to the sending organization. In September, 61% reported being very eager to return to the sending organization.



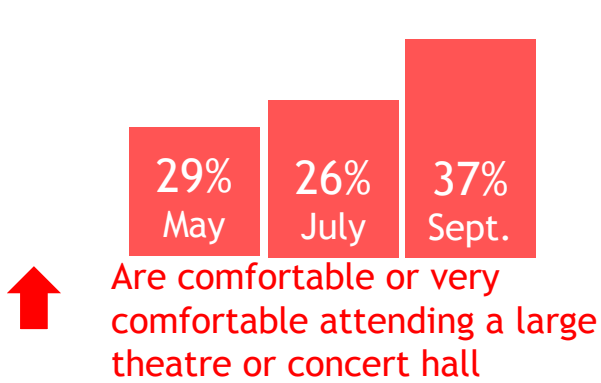
↑ Will spend as much or more than they did before the pandemic on tickets, admissions, and memberships to the sending organization when they return to events



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

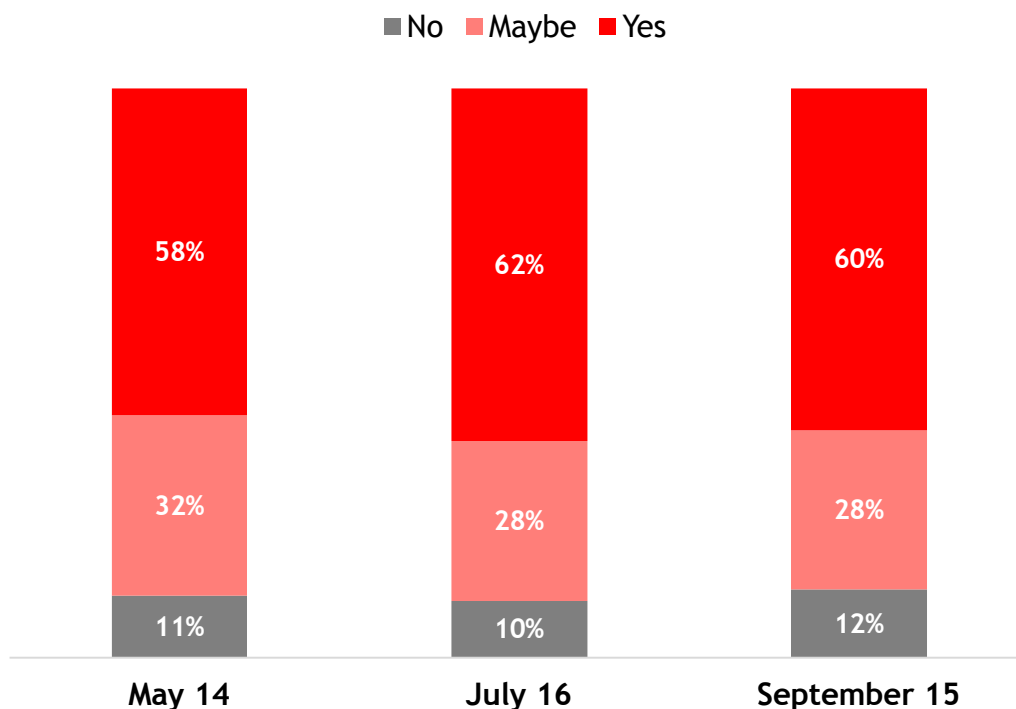
Comfort Attending Cultural Venues

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?



Health Safety Measures

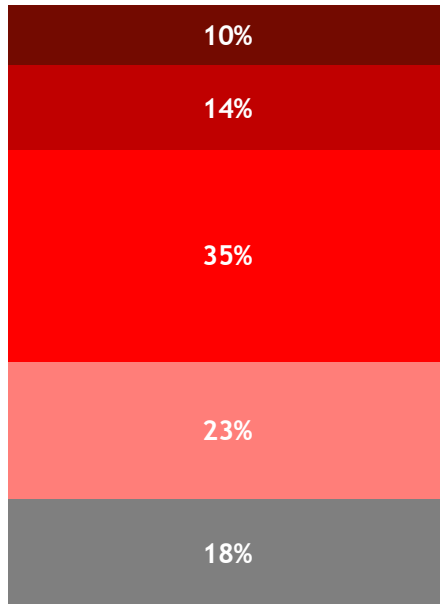
If you are required to wear a mask and adhere to distancing guidelines and other health safety precautions, will you still attend/visit?



Attitudes Towards Vaccination

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

September 15



- I would not get vaccinated
- After I'm confident that the vaccine will effectively prevent me from getting infected
- After the vaccine is in wide use and side effects are proven to be minimal
- As soon as my doctor recommends it for me
- Right away

Why will respondents wait to get vaccinated?

- 57% I am concerned about potential side effects from the COVID-19 vaccine
- 37% I'll wait to make sure those who are more at risk get the vaccine first
- 32% I am not sure the COVID-19 vaccine will be effective enough
- 28% I might not trust the company that develops the COVID-19 vaccine

Why won't respondents get vaccinated?

- 58% I don't trust the COVID-19 vaccine
- 34% I generally don't take vaccines
- 22% I don't think it's necessary
- 2% I have a medical condition that prevents me from being able to get vaccines

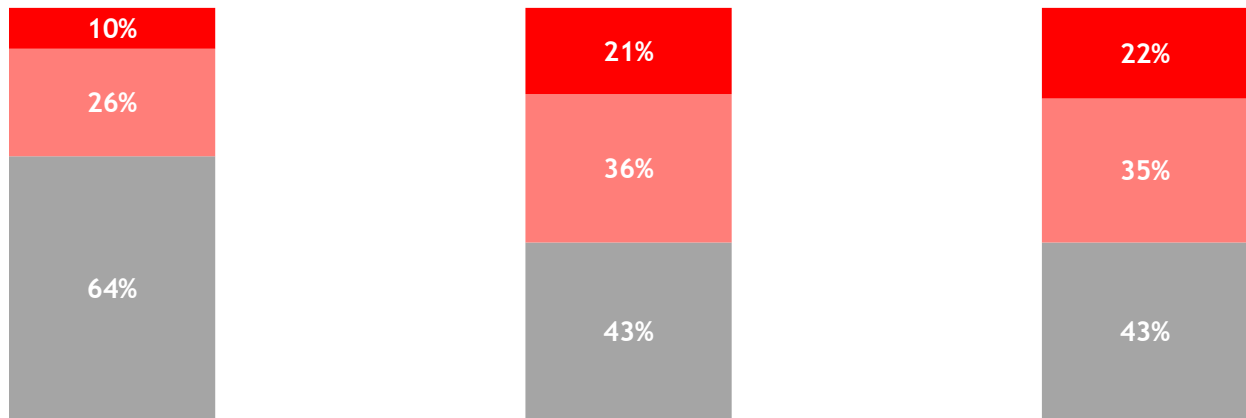
When will respondents return to in person cultural events after being vaccinated?

- 36% After the recommended waiting period (typically several days to a week)
- 12% After I'm certain I've developed immunity
- 42% After I've seen how public adoption of the vaccine impacts infection rates
- 9% 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.

- I did not watch any online cultural programs
- I watched, but did not pay for programs
- I watched and paid for/contributed to programs



I am ready to go to in-person events now/as soon as permitted

I'll return to in-person events when I am confident the risk is minimal

I won't return to in-person events until there's no risk

Respondents who reported that they are ready to return to in-person arts and cultural events indicated lower levels of attending 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: 46%
 Music Concerts: 42%
 Museum Tours: 27%

On Demand Recordings

Theatrical Performances: 47%
 Music Concerts: 37%
 Museum Tours: 36%

No Preference

Theatre: 62%
 Music: 70%
 Visual Art: 65%

Preference for Local

Theatre: 30%
 Music: 13%
 Visual Art: 8%

On Demand Educational Programs

Theatre: 15%
 Music: 17%
 Visual Art: 42%

Episodes About an Artist Competition

Theatre: 11%
 Music: 8%
 Visual Art: 16%

Preference for National/Global

Theatre: 8%
 Music: 16%
 Visual Art: 27%