

**AUDIENCE  
OUTLOOK  
MONITOR**

ONTARIO, CANADA

## Highlights From Audience Outlook Monitor Dashboard

Research Summary for Wave 7 (deployed August 30, 2022)

The Audience Outlook Monitor, Ontario, is presented  
in partnership with the Ontario Arts Council  
in association with the Toronto Alliance for the Performing Arts

## 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.

The Ontario Arts Council, in association with the Toronto Alliance for the Performing Arts, launched the study with a cohort of 83 Ontario-based visual and performing arts organizations in 2020. 22 of those organizations joined a second phase of research in 2021. 10 performing arts organizations continued this work in 2022.

The organizations in Phase 1 deployed the survey four times between June 2020 and February 2021. Phase 2 added two more deployments, in September and November 2021.

This report covers results from the seventh deployment, launched August 30, 2022, which generated 4,654 completed surveys.

## Phase 3 Cohort Participants

Canadian Stage\*

Great Canadian Theatre Company\*

Kingston Symphony Association\*

Kitchener-Waterloo Symphony\*

Stratford Festival\*

Tarragon Theatre\*

The Fringe of Toronto Theatre Festival\*

The Shaw Festival\*

Theatre Aquarius

Toronto Symphony Orchestra \*

*\* Deployed this month*

# Key Takeaways

- Comfort levels at indoor performance venues continue to increase but remain below those of museums and outdoor venues.
- 87% of the survey respondents attended at least one cultural event in the past three months; however, frequency of attendance is reduced across all art forms compared to pre-pandemic levels.
- Among those who haven't yet resumed cultural activities, concerns about COVID are the most commonly cited reason.
- 9 in 10 respondents believe that COVID-safety measures such as masking are still necessary at indoor venues. However, 34% feel it is sufficient to “strongly encourage” mask wearing, rather than requiring it.
- The proportion of respondents who say they purchased single tickets or subscriptions/memberships in the past two weeks is almost unchanged since November 2021 at 54%.
- 11% of pre-COVID arts attendees don't expect to return to performances until February 2023 or thereafter (if ever).
- 57% of respondents started watching more TV and film at home during the pandemic. 25% percent have taken up new forms of entertainment since before the pandemic, most of which are online (e.g., online classes, lectures, lived-streamed performances).

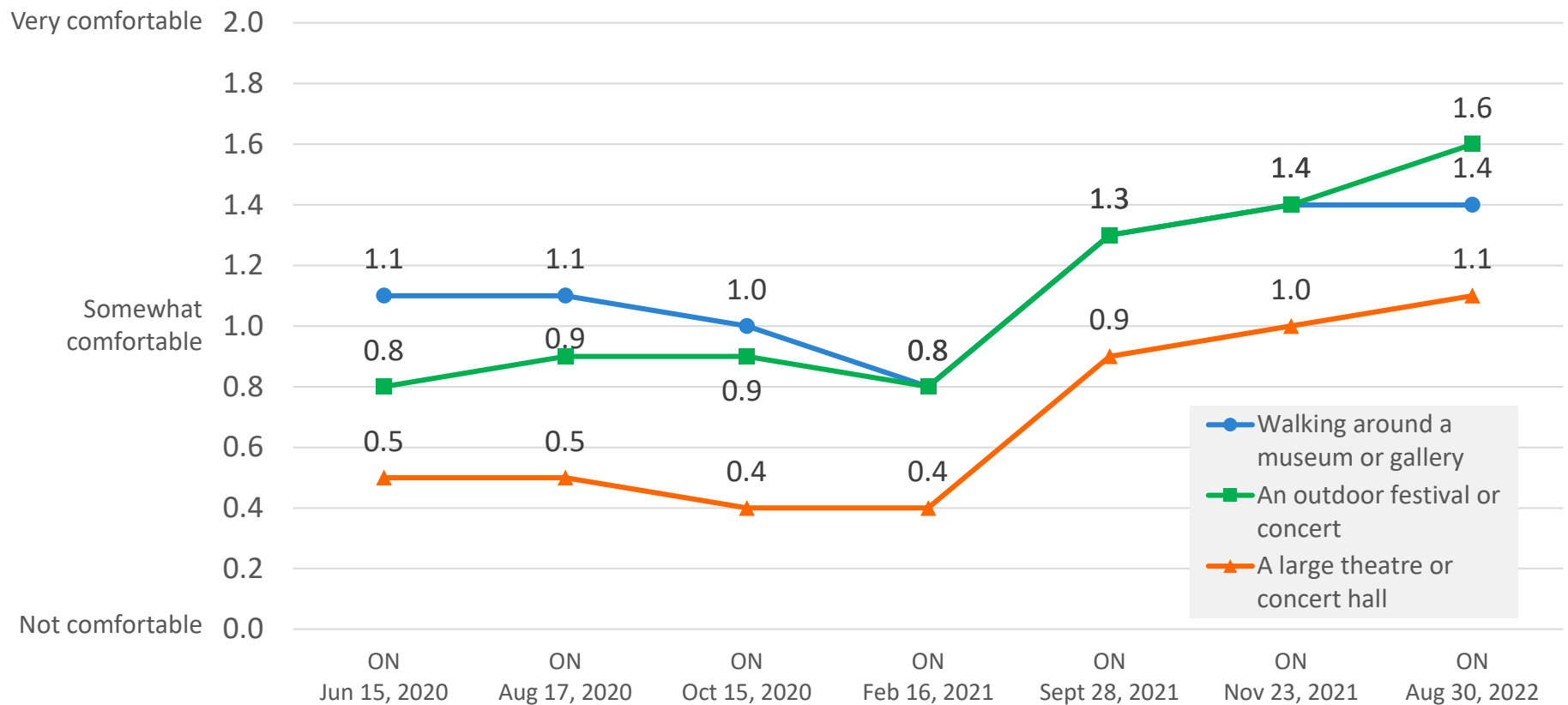
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# Key Indicators of Audience Demand

# Comfort levels at performing arts venues, both indoors and outdoors, have continued to increase in 2022. The average reported comfort level now falls above the mid-point (“somewhat comfortable”) for all three types of venue.

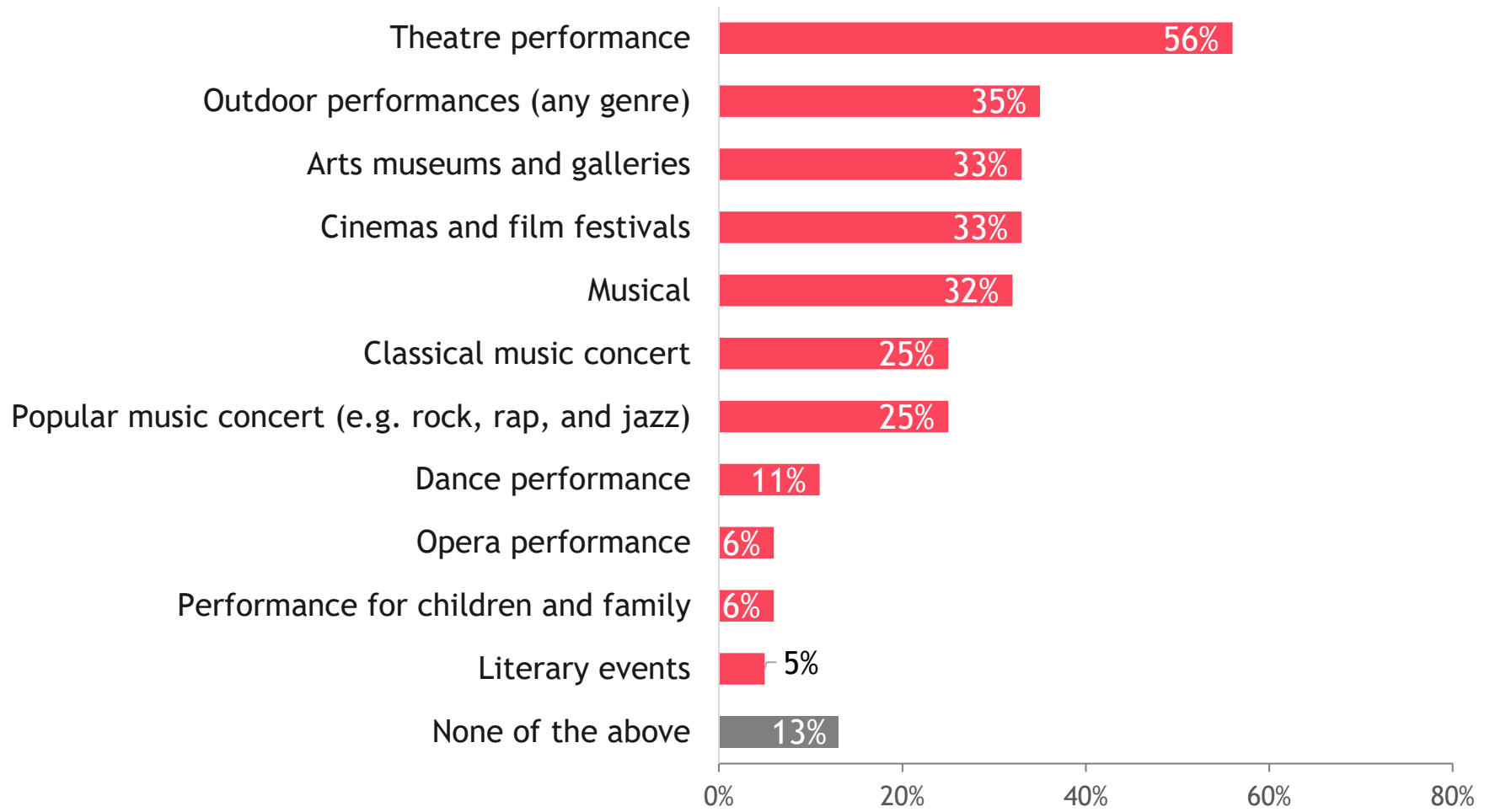
How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following social distancing guidelines and other health and safety procedures?

(Prior to 2022 the assumption was “assuming they were open and following social distancing guidelines and other health safety procedures.”)



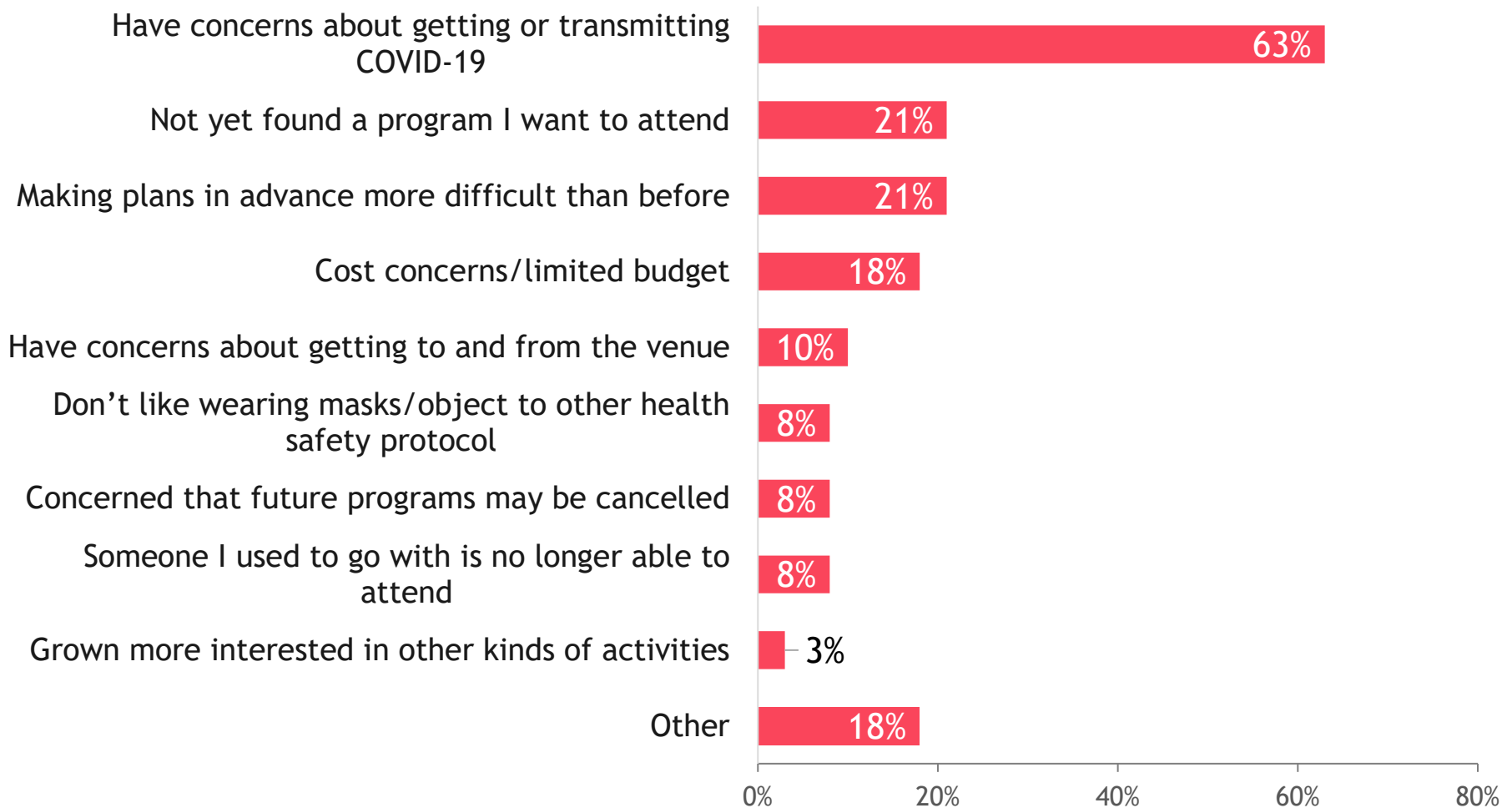
**Only 13% of respondents have not attended any arts events in the the past three months (“none of the above”), indicating that 87% have been to at least one event.**

In the past three months did you attend did any of the following types of cultural events?  
(Multiple Responses Accepted)



Among those who haven't attended performing arts events, concern about COVID is by far the most frequent reason (63%). However, 18% mention cost and 21% cite not finding programs they're interested in among their reasons for not attending.

Why haven't you attended any live events recently (select all that apply)?



## “Other” reasons for not attending live performances include:

“Hard to get back into the habit of attending concerts.”

“I would prefer if masks were still in use especially for indoor venues.”

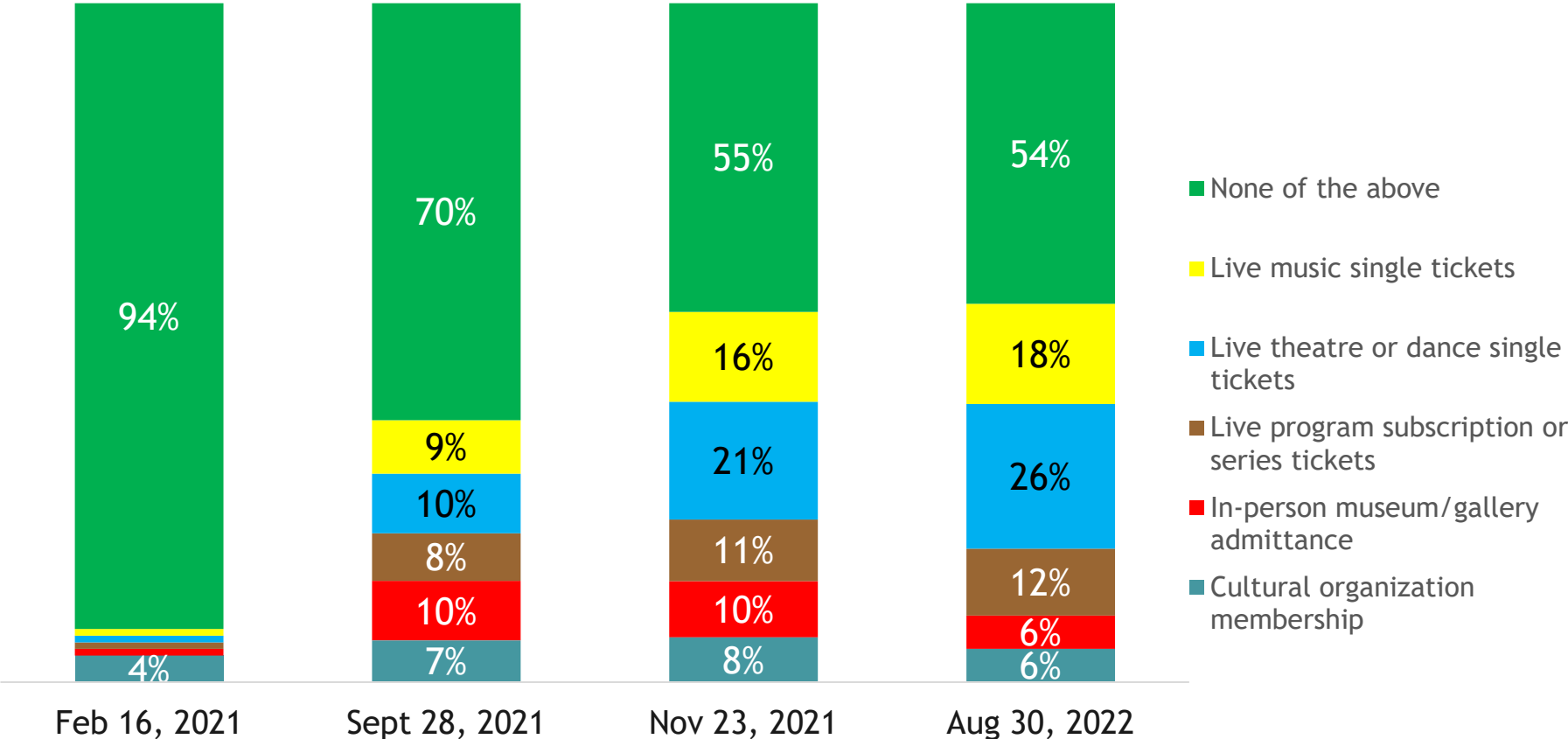
“I have health problems.”

“During the summer we spend more time in outdoor activities.”



While single ticket sales for live music, theatre, and dance have increased slightly, the proportion of respondents saying they haven't purchased tickets for cultural programs in the past two weeks is almost unchanged since November 2021 at 54%.

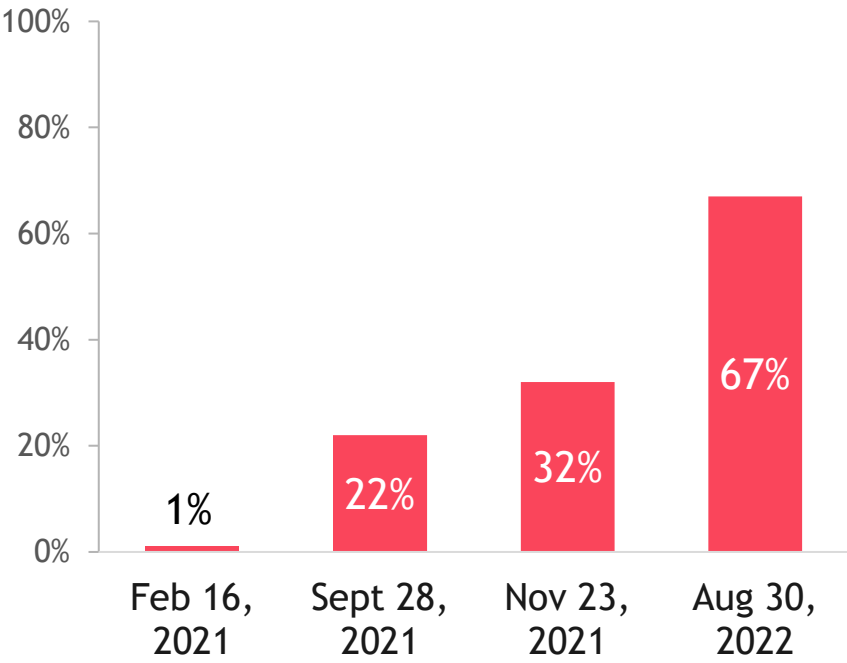
In the past two weeks, did you purchase any of the following (Select all that apply)?



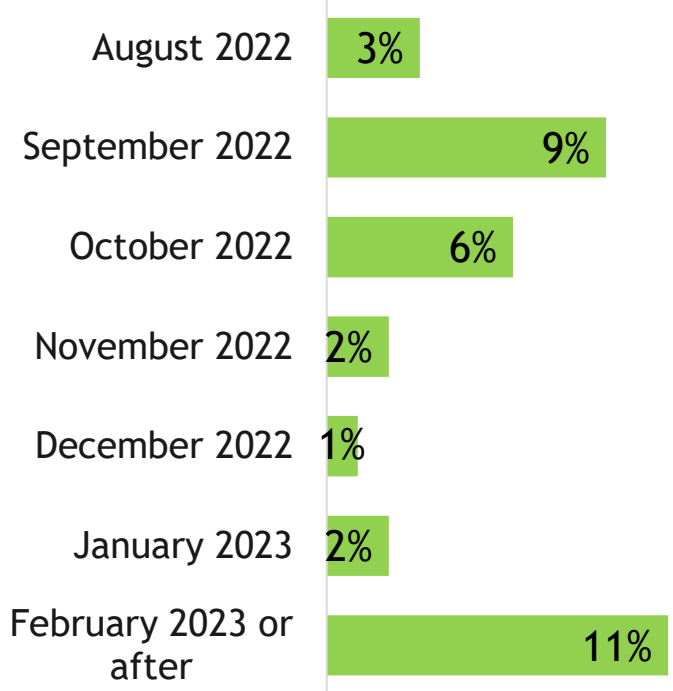
**While 67% are already attending in-person performing arts programs and 18% plan to do so by October, 11% don't expect to return to performances until well into the new year (if ever).**

Given the current rates of COVID-19 infection and progress with vaccination roll-out, when do you think you'll resume attending in-person performing arts programs?

Already Attending



Planned Month of Resuming In-person

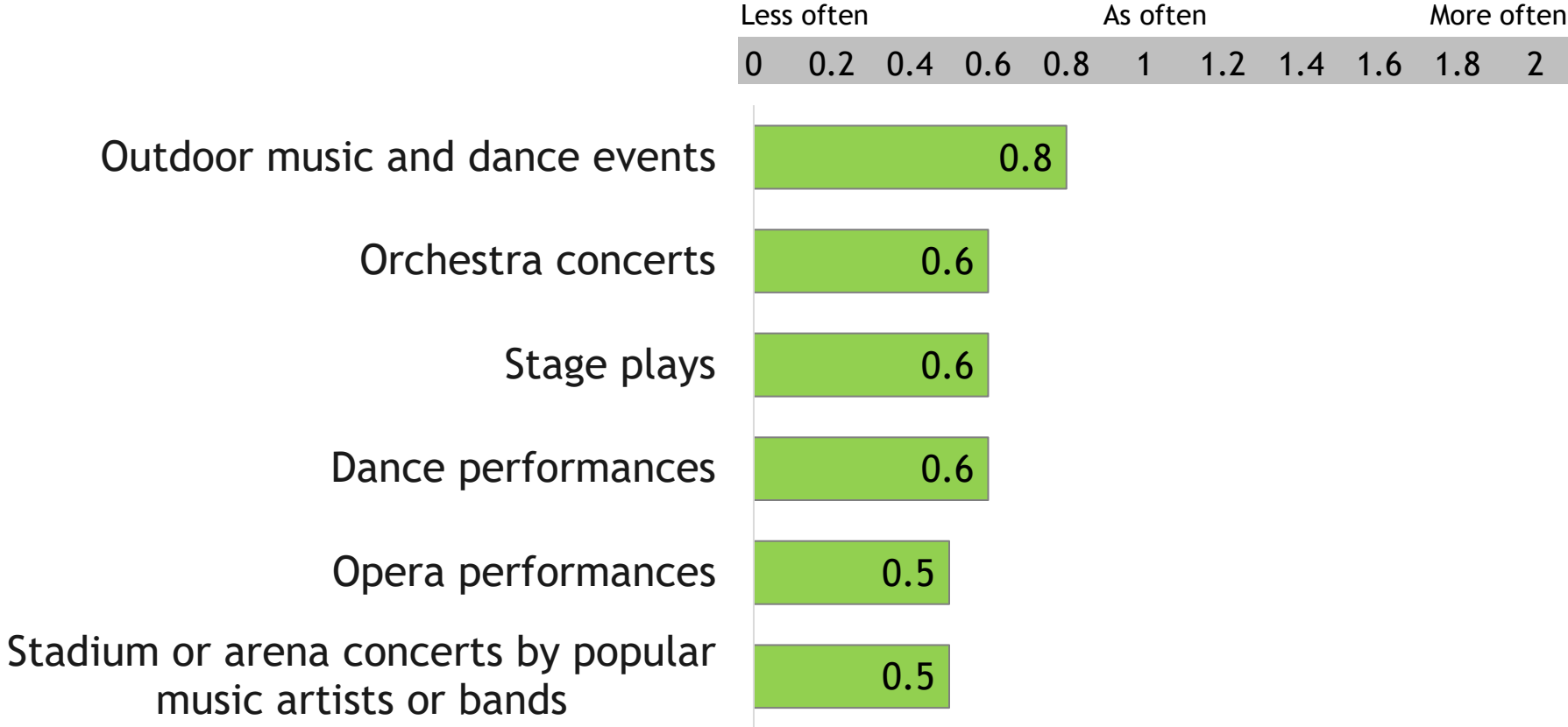


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# Self-reported behavioral changes

# Across all genres, respondents are attending live events less frequently than before the pandemic.

Thinking about your attendance at live events before the pandemic compared to now. For each of the following types of events, please indicate if you are attending less often, as often or more often.



# More than four in ten (44%) respondents are more selective than before the pandemic and are going out less often to live entertainment as a result of the current economic situation.

Inflation is high, and prices for gas, food and other goods has risen sharply. How has the current economic situation affected your spending on live entertainment?

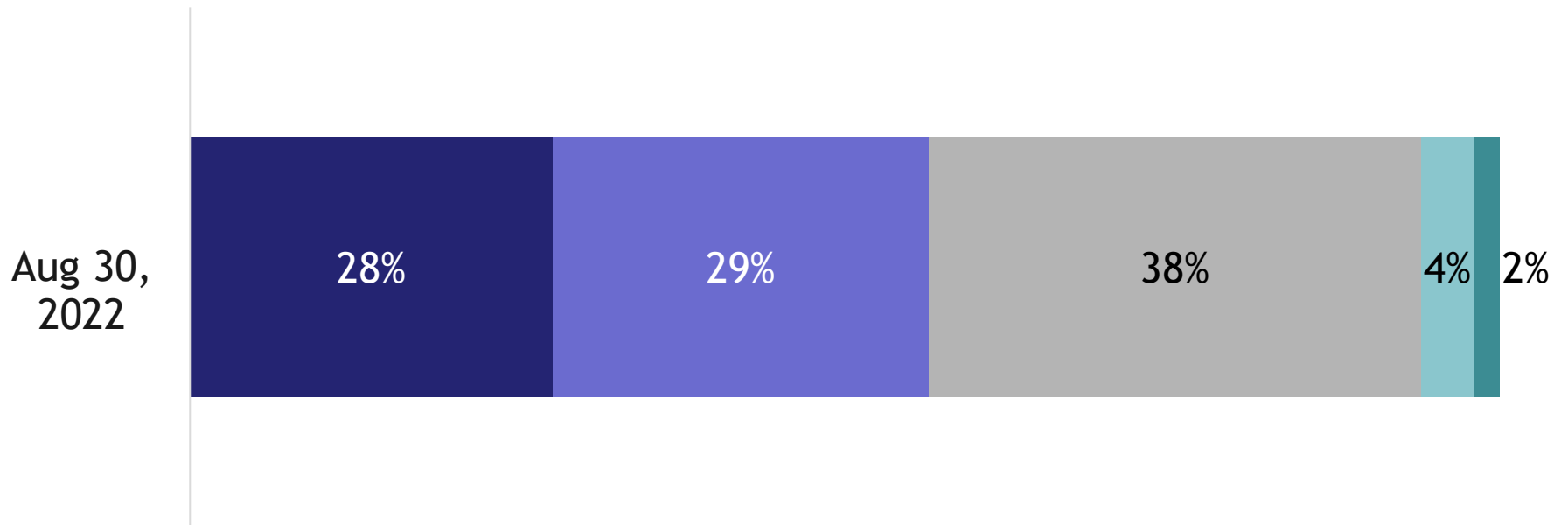
■ More selective than before the pandemic   ■ No more/less selective   ■ Less selective than before the pandemic



# 57% of respondents are watching more film and TV at home than prior to the pandemic, with 28% saying they're watching a lot more.

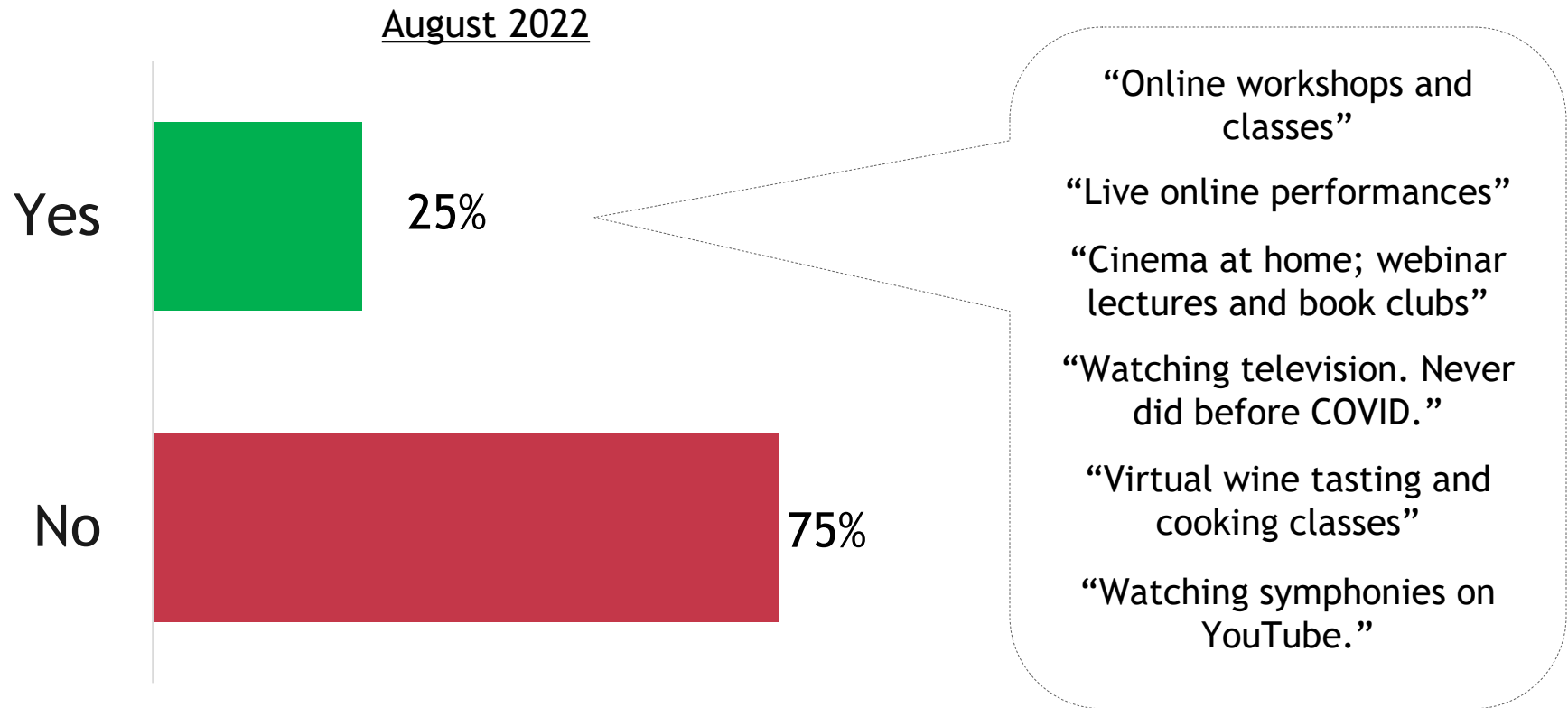
Thinking about your current at-home entertainment activities, would you say that you watch film and television programs...

■ A lot more often   ■ A little more often   ■ The same as before   ■ A little less often   ■ A lot less often



# 25% have taken up new forms of entertainment since before the pandemic.

Are you doing any new entertainment activities now that you didn't do before the pandemic, either live or digital?



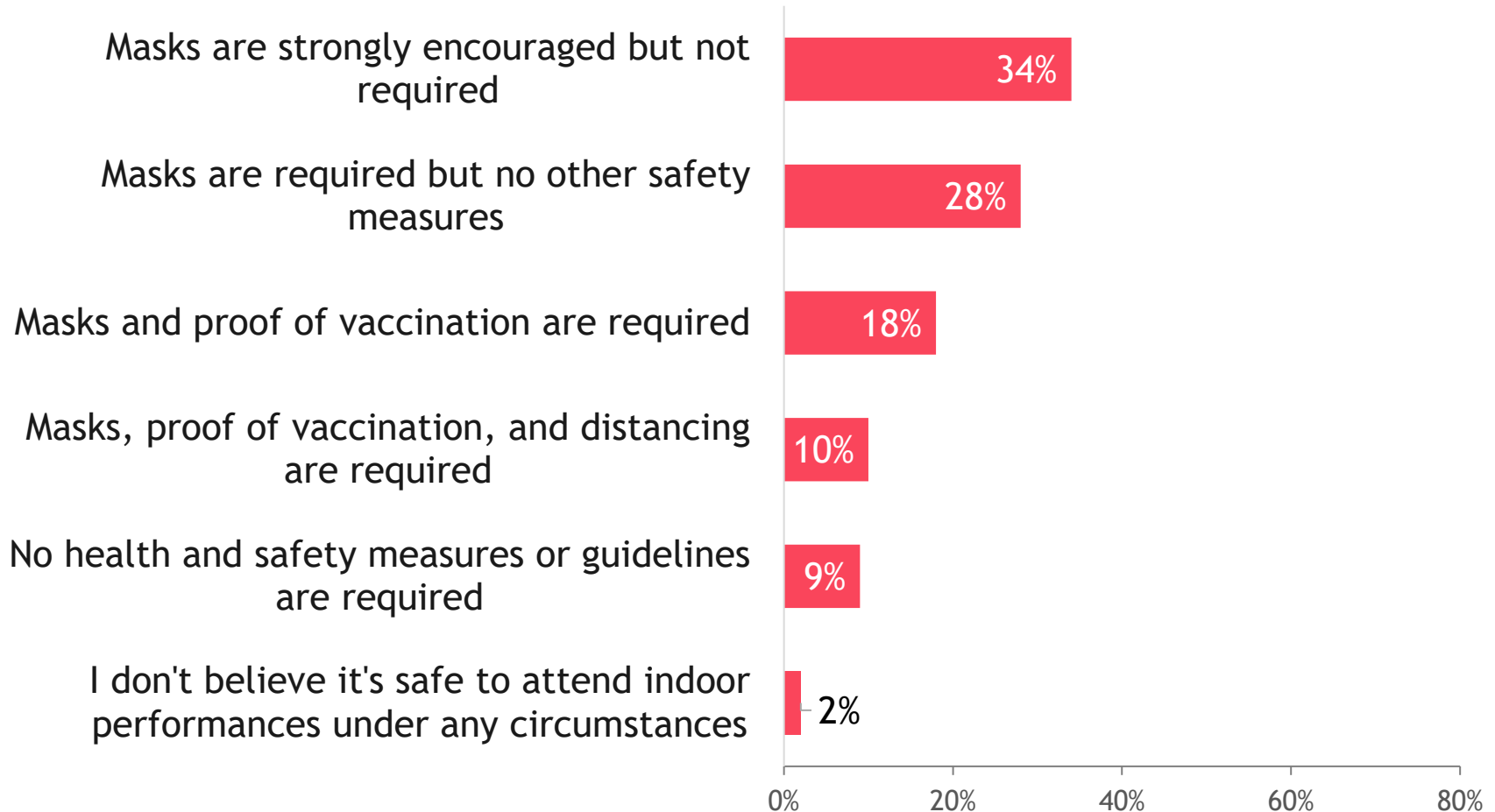
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# In-venue Safety and Mask Wearing



**9 in 10 respondents believe some form of safety protocols and guidelines are necessary at indoor venues. 62% think masks (required or strongly encouraged) are sufficient, but 28% believe more stringent protocols, such as proof of vaccination and social distancing, are warranted.**

Which COVID safety policy do you think is most appropriate for indoor venues at this time?



# Over half (56%) say they always wear a mask when that is encouraged. Another 37% say it depends on the situation.

What do you do in local area venues where masks are encouraged but not required?

■ I always wear a mask ■ I may or may not wear a mask, depending on the situation ■ I never wear a mask



**The full dataset is available for analysis via the online dashboard at:**

**<https://dashboard.intrinsicimpact.org>  
User: OAC@audienceoutlookmonitor.com  
Password: ontario**