AUDIENCE
OUTLOOK
MONITOR

ONTARIO, CANADA

Highlights From the Audience Outlook Monitor Survey

Research Summary for Wave 8 (deployed October 18, 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

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About the Study

The COVID-19 Audience Outlook Monitor is a longitudinal tracking study of audience attitudes about attending 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. Twenty-two of those organizations joined a second phase of research in 2021. Nine 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 deployments in September and November 2021, and Phase 3 launched in August 2022.

This report covers results from the final deployment of the study, launched on October 18, 2022, which generated 4,183 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

Toronto Symphony Orchestra

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Key Takeaways

- Key indicators of demand are continuing to improve. In October, 89% of the survey respondents reported that they had attended at least one cultural event in the past three months.

- On average, respondents now feel “somewhat” or “very” comfortable at both indoor and outdoor arts venues, despite their perception that COVID-19 hospitalizations are increasing in their region. This suggests that new waves of COVID may not diminish arts attendance too severely.

- Despite these positive developments, 11% of pre-pandemic ticket buyers don’t expect to return to in-person performances before April 2023, and it seems questionable whether that portion of the pre-pandemic audience will ever return.

- However, the larger challenge to the long-term recovery of the arts sector seems to lie in attendance frequency. Across all genres, respondents are attending live events less frequently than before the pandemic.

- While concerns about COVID-19 are gradually diminishing, 69% believe masking recommendations or requirements are still warranted and 86% of respondents state that high-capacity ventilation and air-filtration systems would positively influence their decision to attend an indoor event.

- There’s also been a slight uptick in financial concerns in recent months. If that trend continues, it could have a dampening effect on arts attendance.

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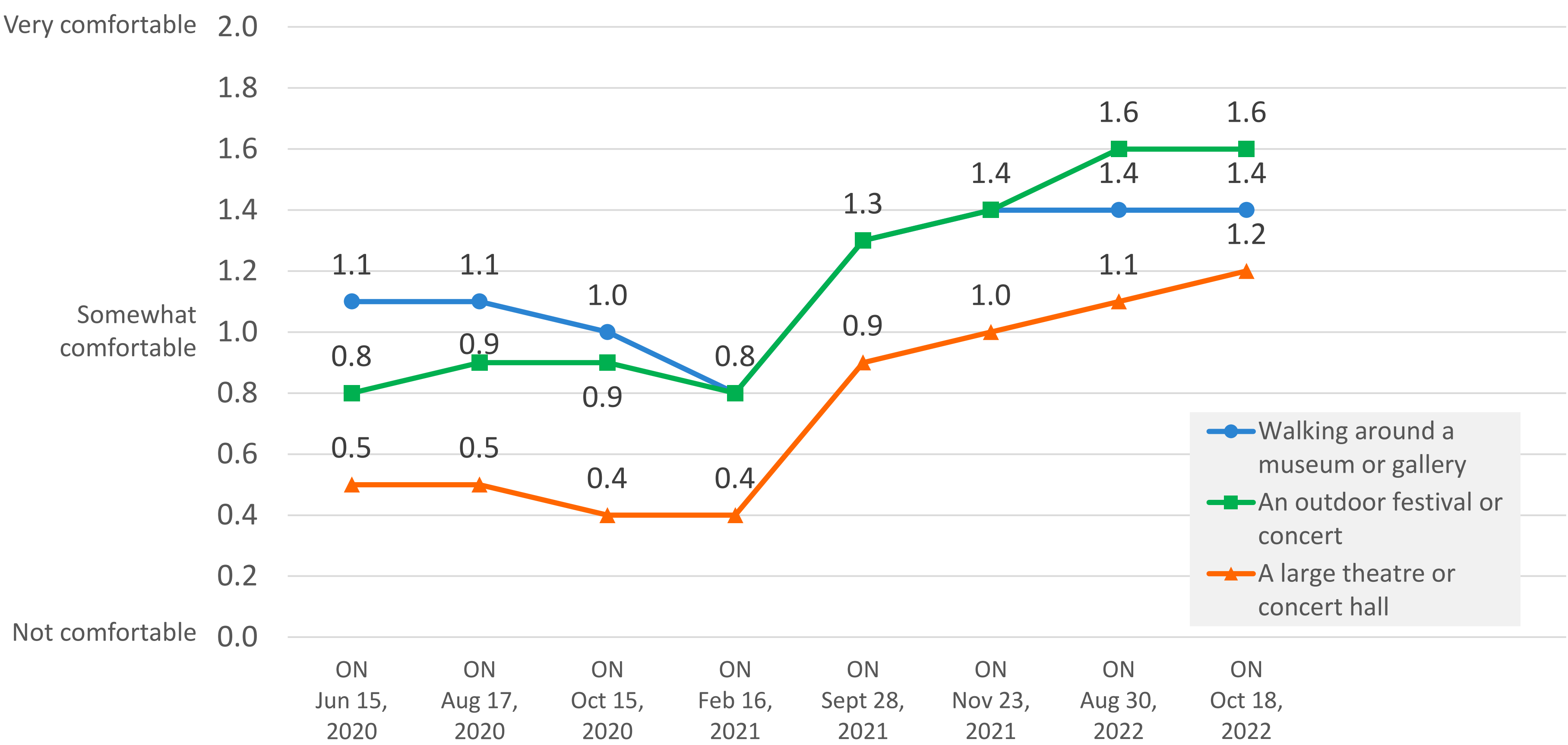
Key Indicators of Audience Demand

Average reported comfort levels in both indoor and outdoor performance venues as well as museums are generally positive (above "somewhat comfortable"). Comfort levels in large indoor theatres have continued to improve in recent months, but a leveling-off at other kinds of venues suggests lingering concerns may be difficult to overcome.

How comfortable would you feel attending the following types of cultural facilities today, assuming masks were strongly encouraged but not required?
(Prior to 2022 the assumption was "assuming they were open and following social distancing guidelines and other health and safety procedures.")



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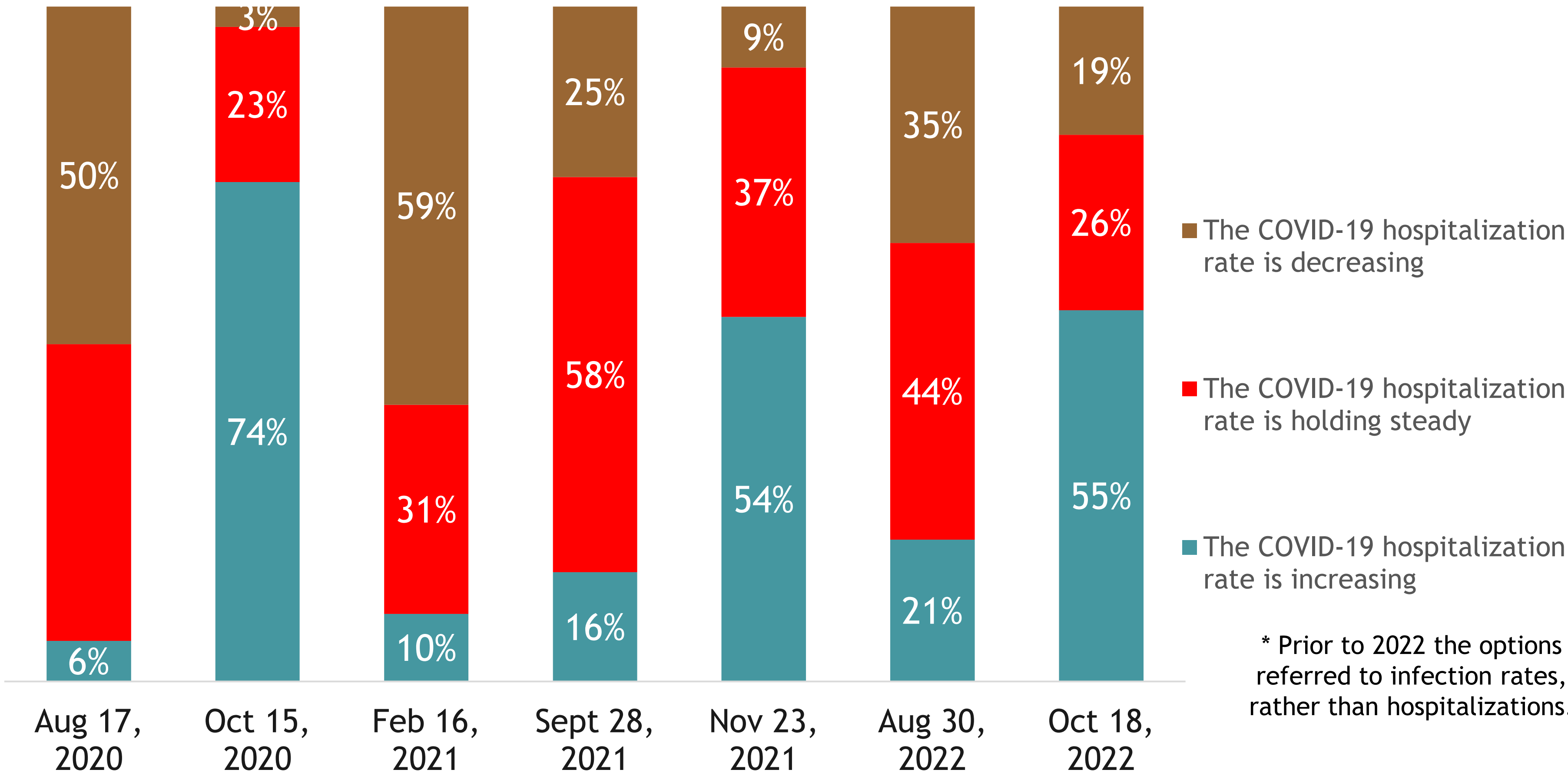
The increased comfort levels reported on the previous page were observed despite respondents' perception that COVID-19 hospitalizations are increasing in their region. This suggests that arts attendance may not be affected by new waves of COVID-19 too severely.

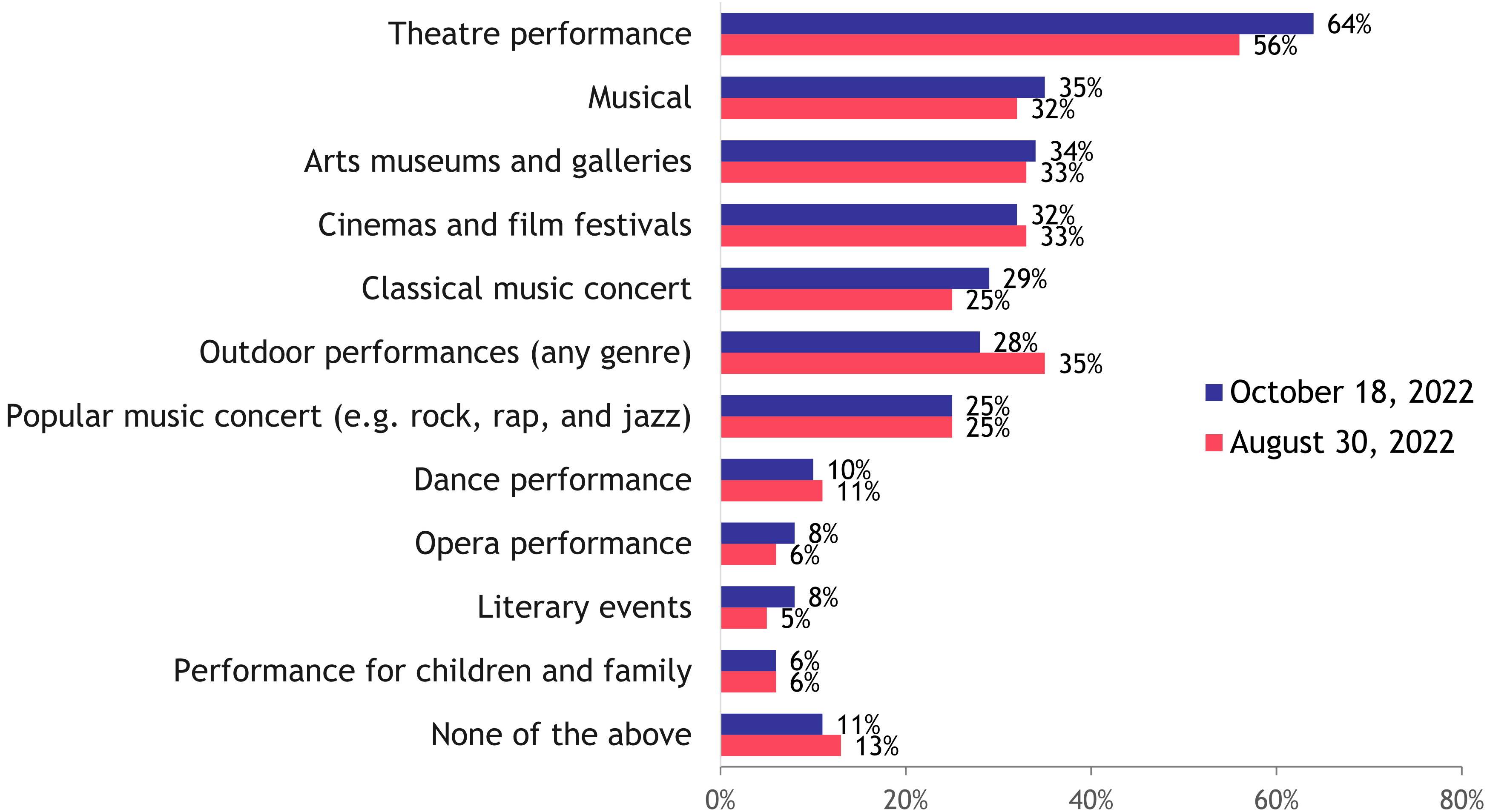
To the best of your knowledge, which one of the following statements best describes the current conditions in your region?



* Prior to 2022 the options referred to infection rates, rather than hospitalizations.

89% of respondents have attended at least one form of arts event in the the past three months. (Only 11% selected "none of the above"). While some of the increased participation may be seasonally motivated, there's a particularly large influx in theatre attendance (64%, up from 56% in August).

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



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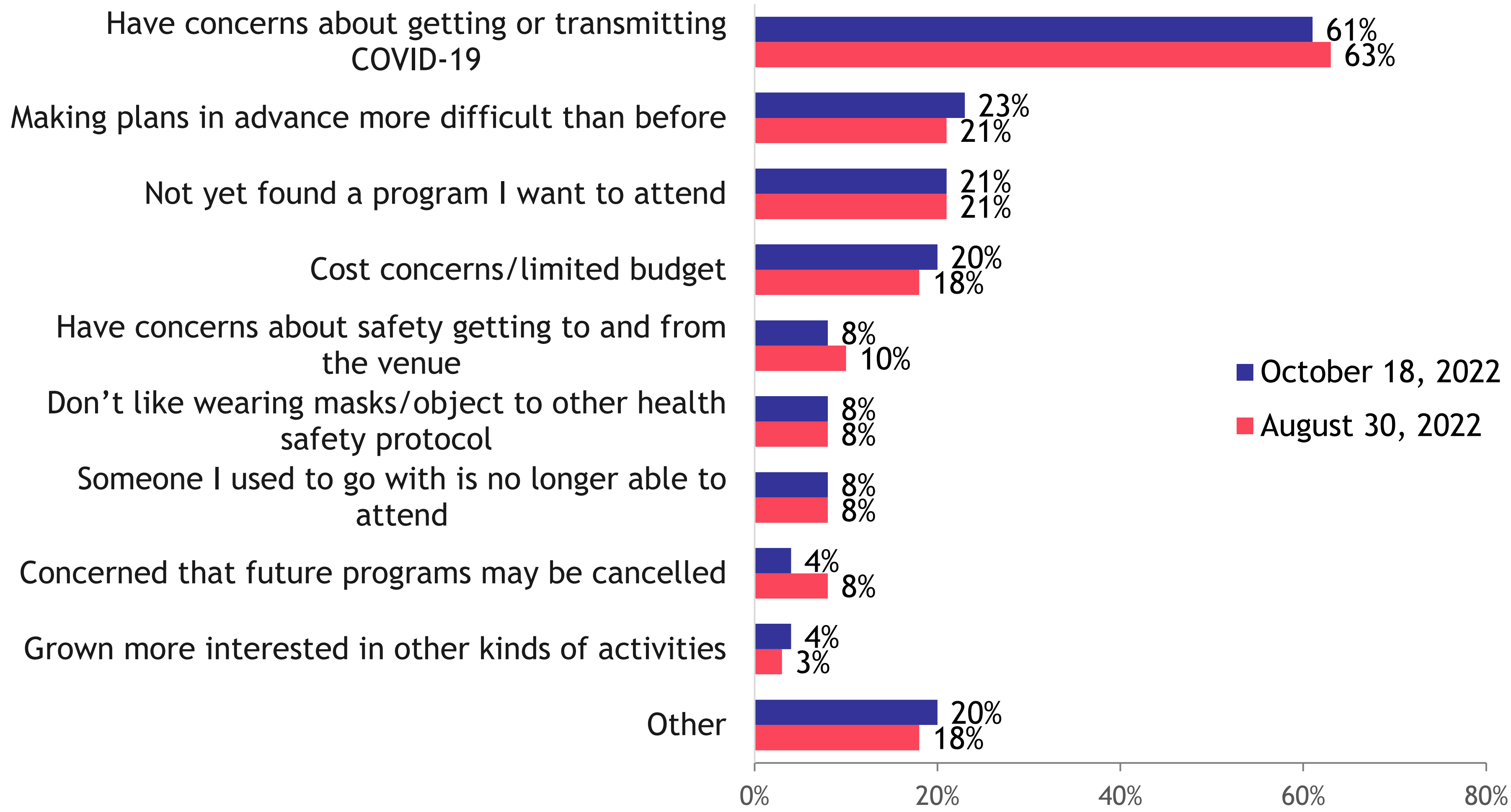
While concern about COVID remains by far the most frequently cited reason among people who haven't attended arts events (61%), that figure has decreased since August, whereas financial concerns and difficulty making plans have both increased slightly.

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



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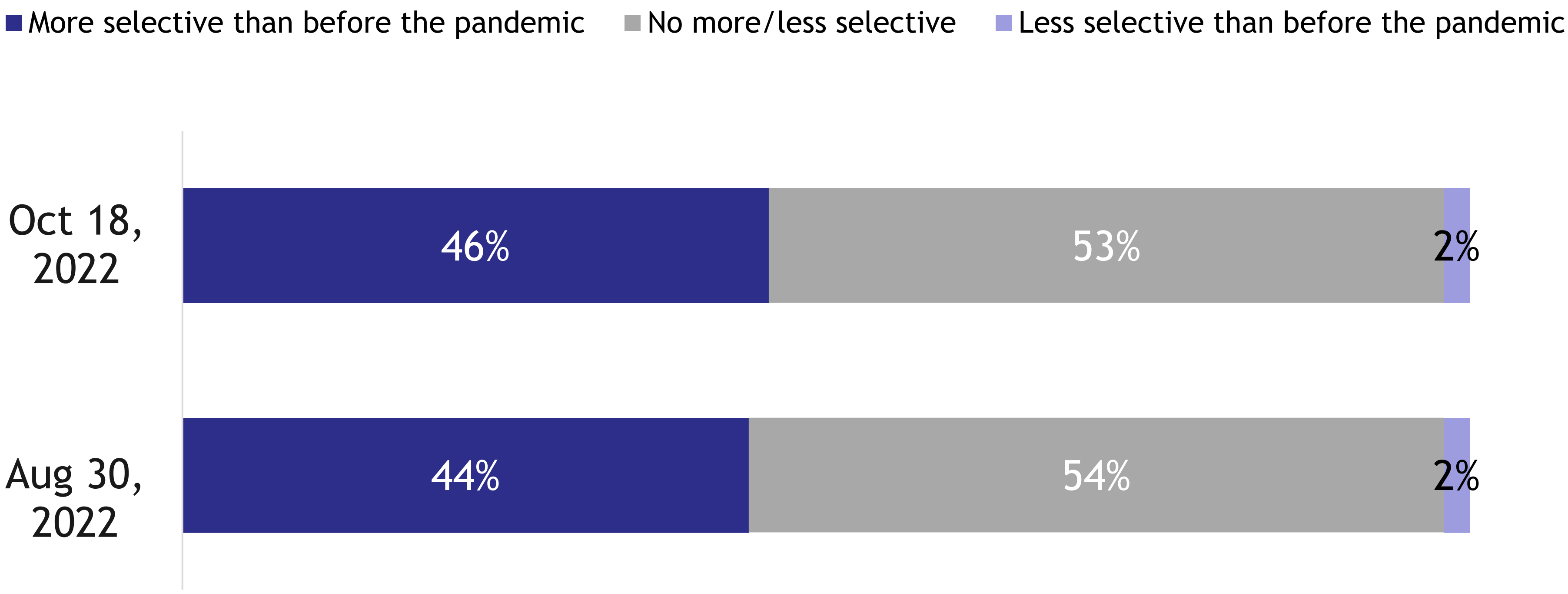
A separate question focused on the current high inflation rates also suggests a slight uptick in economic concerns among arts audiences. In October, 46% of respondents indicated that they are now more selective in their spending on live entertainment.

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?



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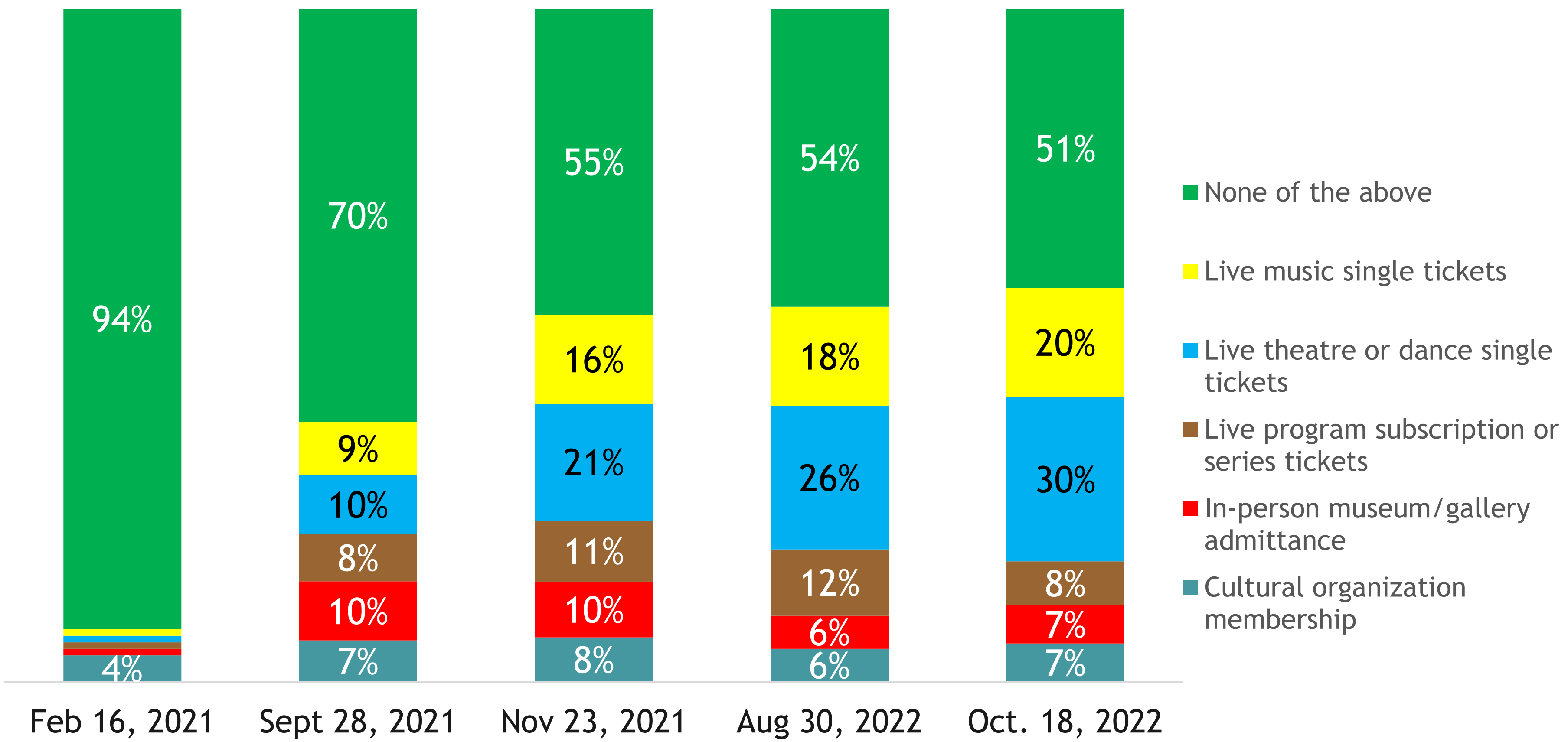
Single ticket sales for live music, theatre, and dance have increased since August, but subscription purchases have declined.

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



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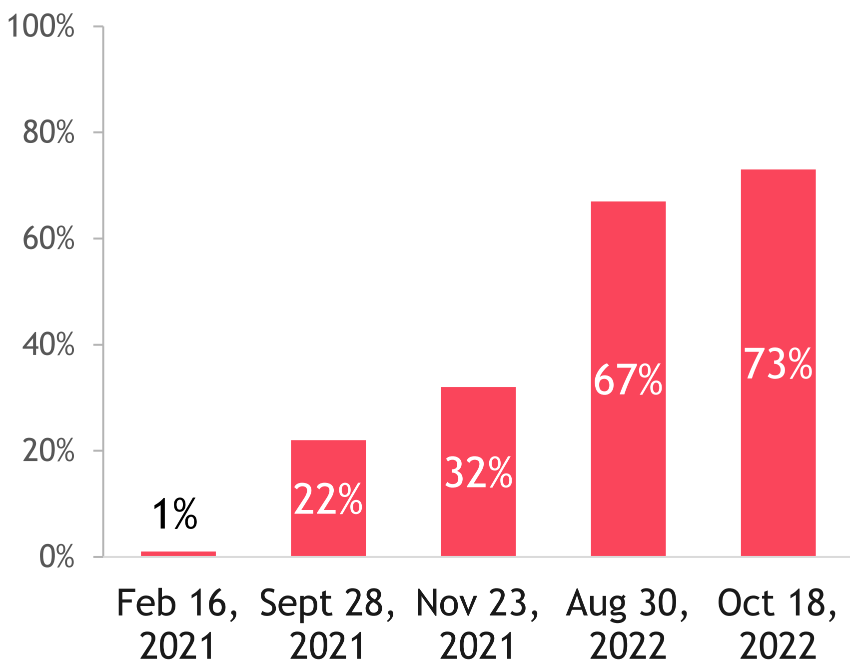
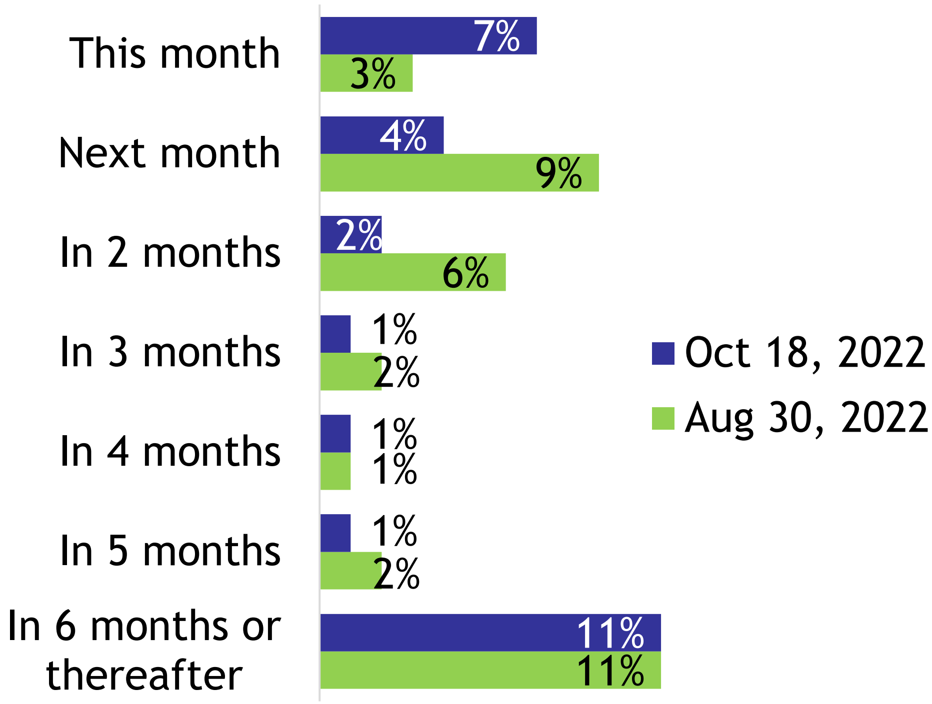
73% are already attending in-person performing arts programs, and that figure is expected to climb to 86% by the end of the year. Beyond that point, the recovery will likely slow down, and it's unclear whether we'll ever regain the final 11% of pre-pandemic ticket buyers.

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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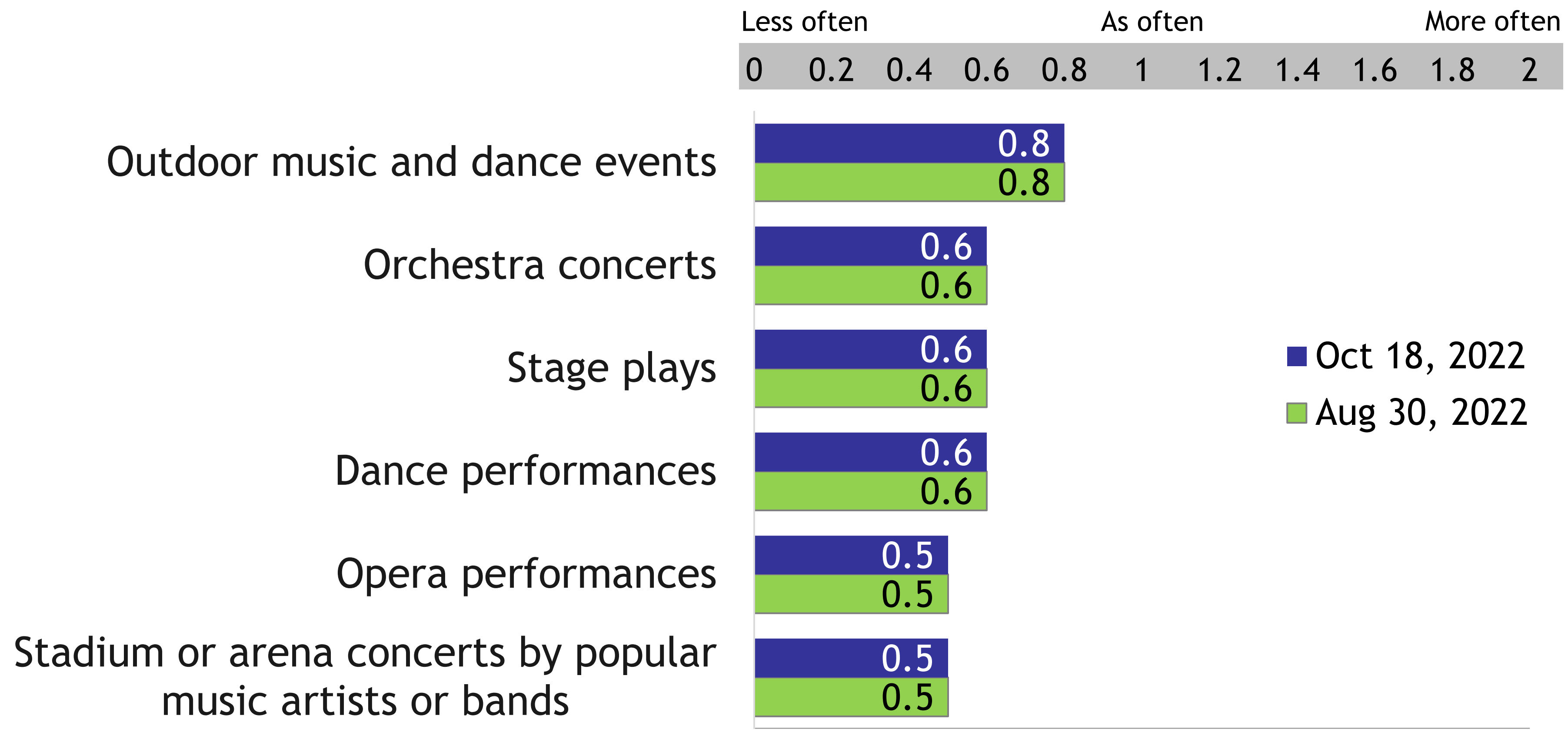
The larger challenge to the long-term recovery of the arts sector seems to be attendance frequency. Across all genres, respondents are attending live events less frequently than before the pandemic.

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.



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In-venue Safety and Mask Wearing

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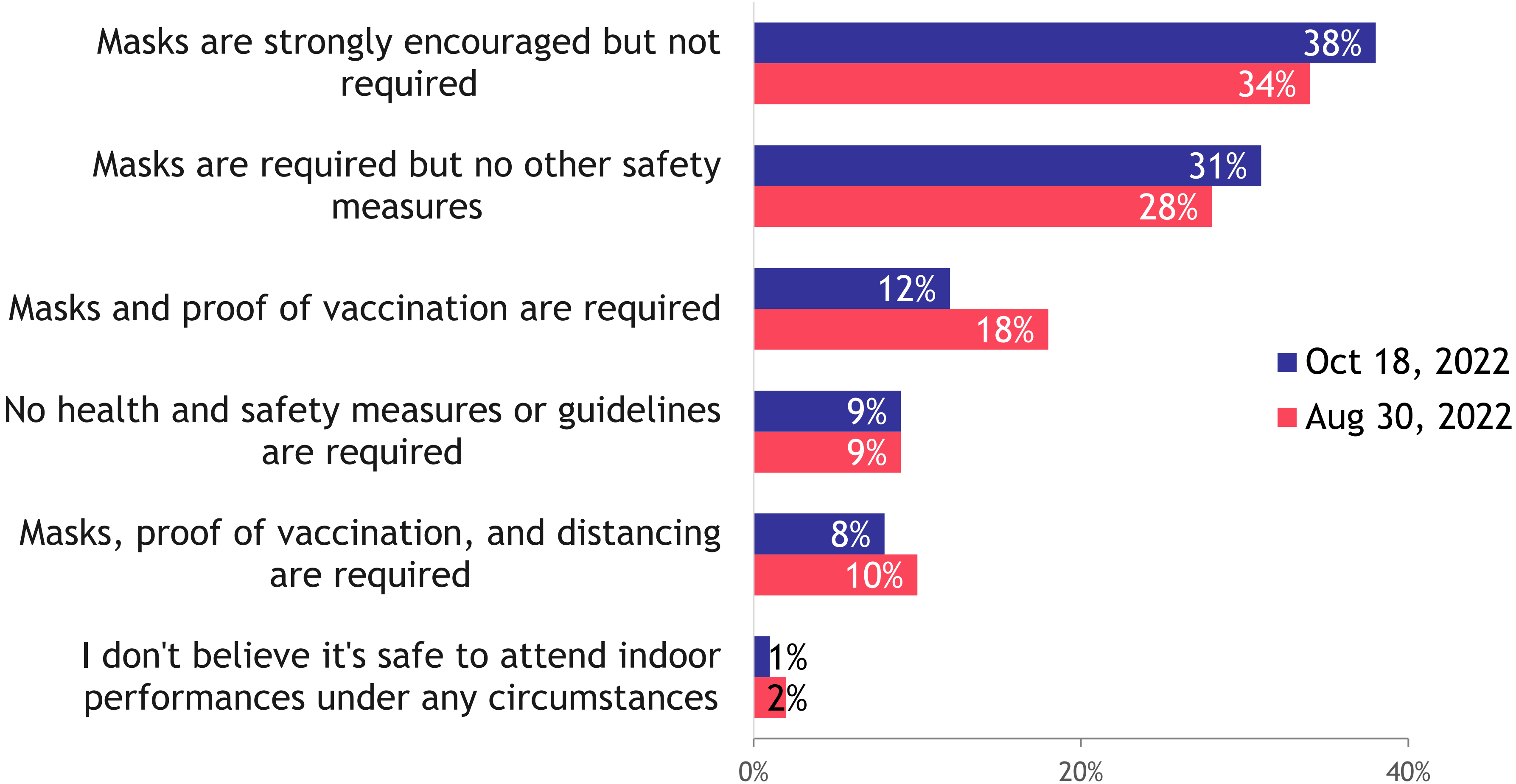
Support for masking (recommendations or requirements) has further increased in October, but the number of respondents in favor of vaccination requirements has declined. The proportion of respondents who don't believe any health safety measures or guidelines are necessary is small, but consistent, at 9%.

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



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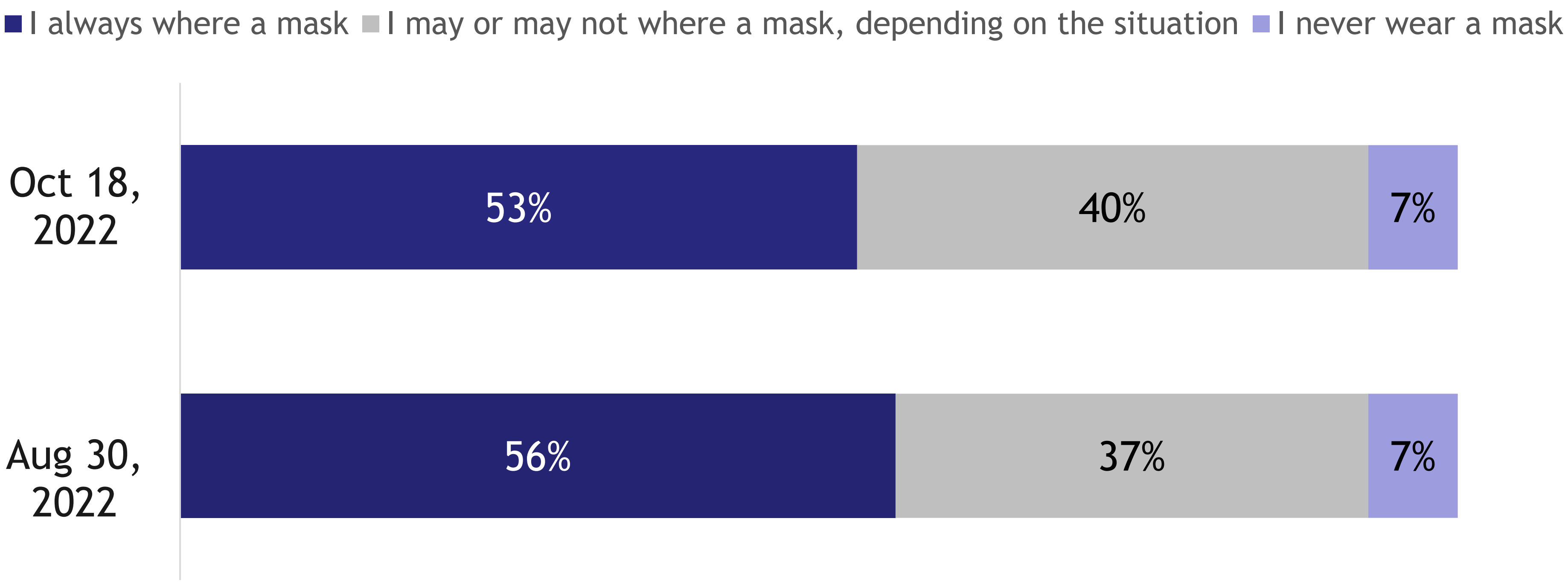
Most respondents (53%) say they always wear a mask when that is encouraged, but the number of people who use their own discretion to decide when to wear a mask increased to 40% in October.

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



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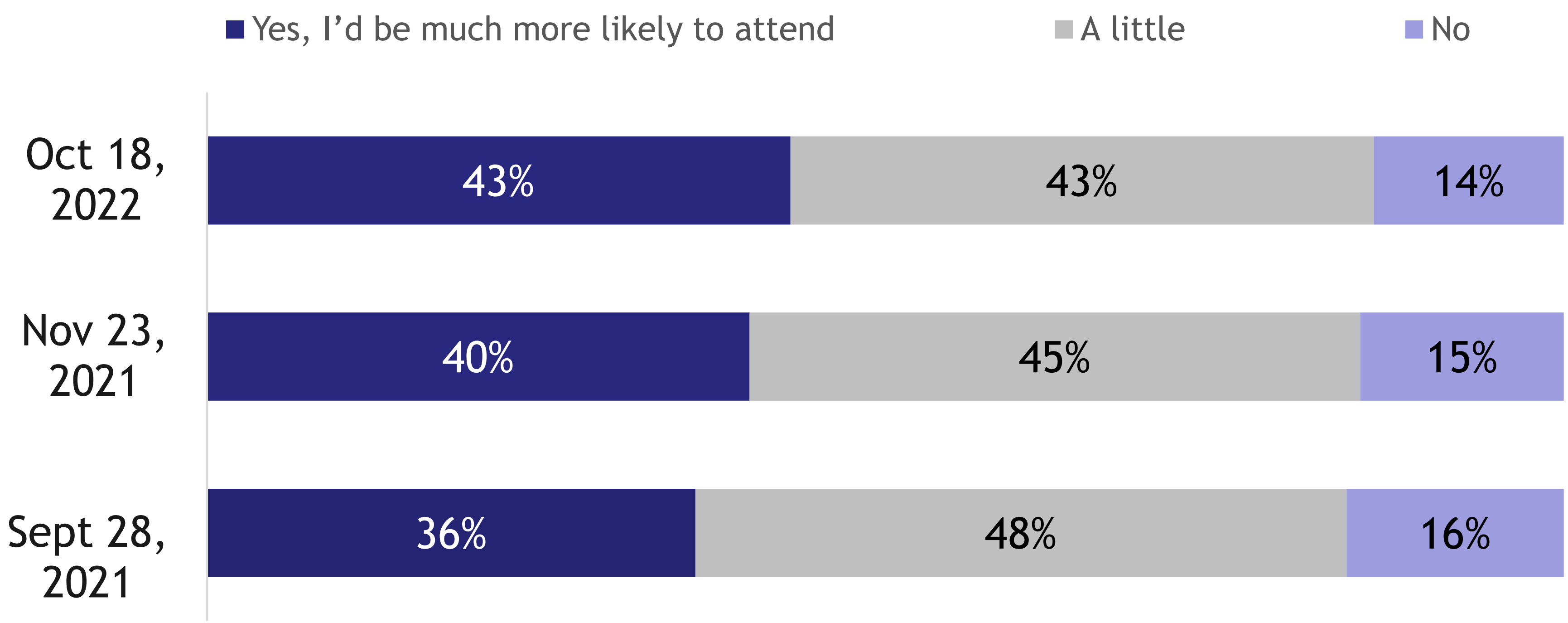
86% of respondents state that high-capacity ventilation and air-filtration systems would positively influence their decision to attend an indoor event.

Would the use of high-capacity ventilation and air-filtration systems make you more likely to attend indoor events?
(This question was not asked in August 2022)



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

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

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