AUDIENCE OUTLOOK MONITOR

A longitudinal study of audience attitudes about arts and cultural events during COVID-19

Findings from Ontario

In Partnership with

ONTARIO ARTS COUNCIL
CONSEIL DES ARTS DE L'ONTARIO

an Ontario government agency
un organisme du gouvernement de l'Ontario

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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, hosted a cohort of 83 organizations for Phase 1, and 22 of those organizations chose to continue this work in Phase 2.

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 sixth deployment, launched November 23, 2021, which generated 4,990 completed surveys.

Phase 2 Cohort Participants

* Deployed the survey this month.

- Art Gallery of Windsor*
- Canadian Clay and Glass Gallery*
- Canadian Stage*
- Fringe of Toronto Theatre Festival*
- Grand Theatre*
- Great Canadian Theatre Company*
- Hot Docs*
- Kingston Symphony Association*
- Kingston WritersFest*
- Kitchener-Waterloo Symphony*
- Luminato Festival*

- Shaw Festival*
- Soulpepper*
- Stratford Festival*
- Tafelmusik*
- Tarragon Theatre*
- Textile Museum of Canada*
- The Musical Stage Company*
- The Robert McLaughlin Gallery*
- Theatre Aquarius*
- Toronto Jewish Film Foundation*
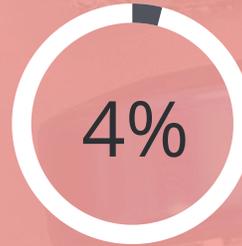- Toronto Symphony Orchestra*

Vaccination
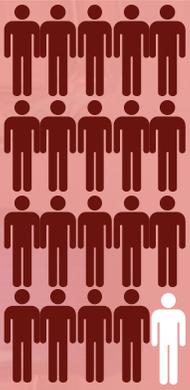
98%

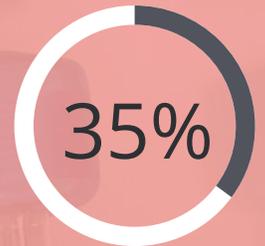Of respondents are partially or fully vaccinated.

Up from 97% in September

When will vaccinated respondents be ready to return to in-person arts and cultural events?

Waiting for others in their network to get vaccinated

4%

Up from 3% in September

Waiting for low infection rates

35%

Down from 46% in September

Ready now

50%
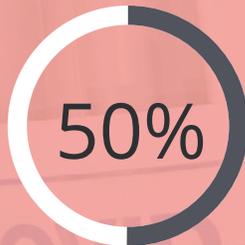
Up from 43% in September

Waiting for safety measures to be removed

3%

Down from 4% in September

Waiting to be certain of immunity

2%

2% in September

How do respondents' rates of full vaccination compare to national figures?

- Ontario AOM Respondents
- Ontario*
- Canada, 12+ **

* Source: Public Health Ontario
** Source: Public Health Agency of Canada

Vaccination

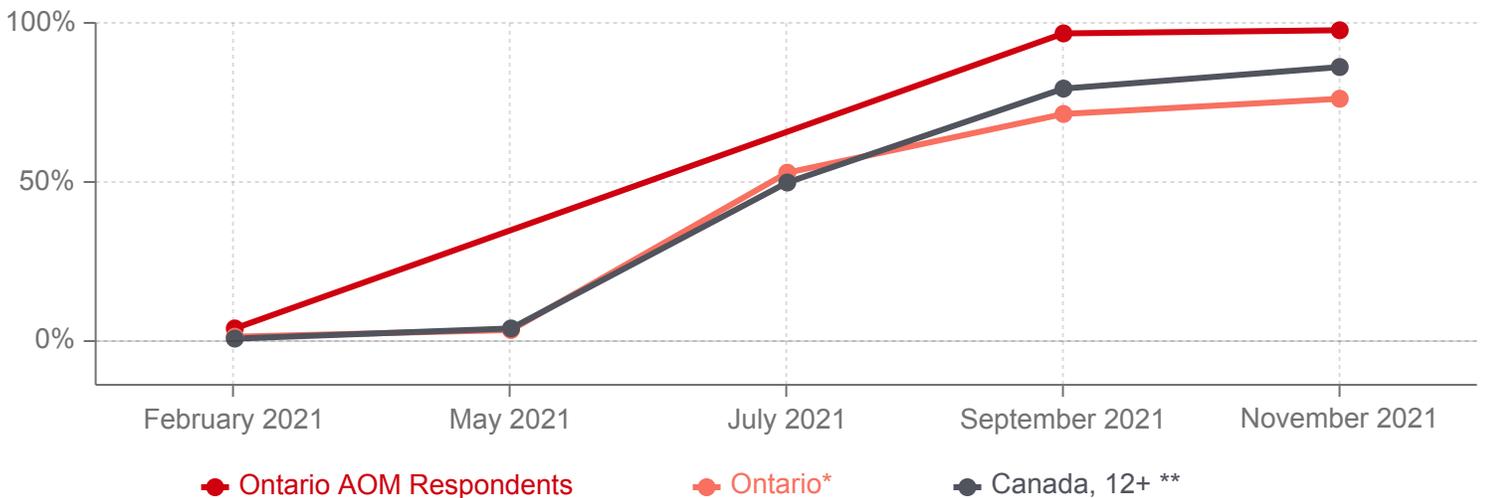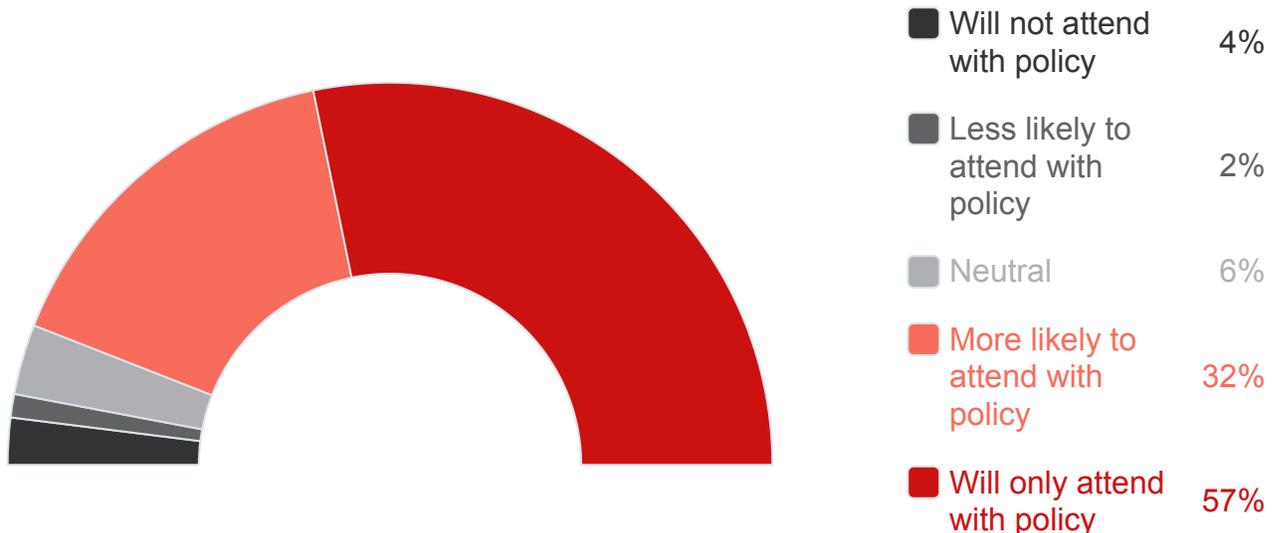**58%** of vaccinated respondents reported that they are somewhat or very confident that the vaccine protects them enough for them to resume their normal activities

How would a vaccinated-only admittance policy impact your feelings about attending in-person events?

■ Will not attend with policy	4%
■ Less likely to attend with policy	2%
■ Neutral	6%
■ More likely to attend with policy	32%
■ Will only attend with policy	57%

"As someone who is immunocompromised, I would only feel safe attending events where there are multiple infection prevention measures in place, including vaccination and masking."
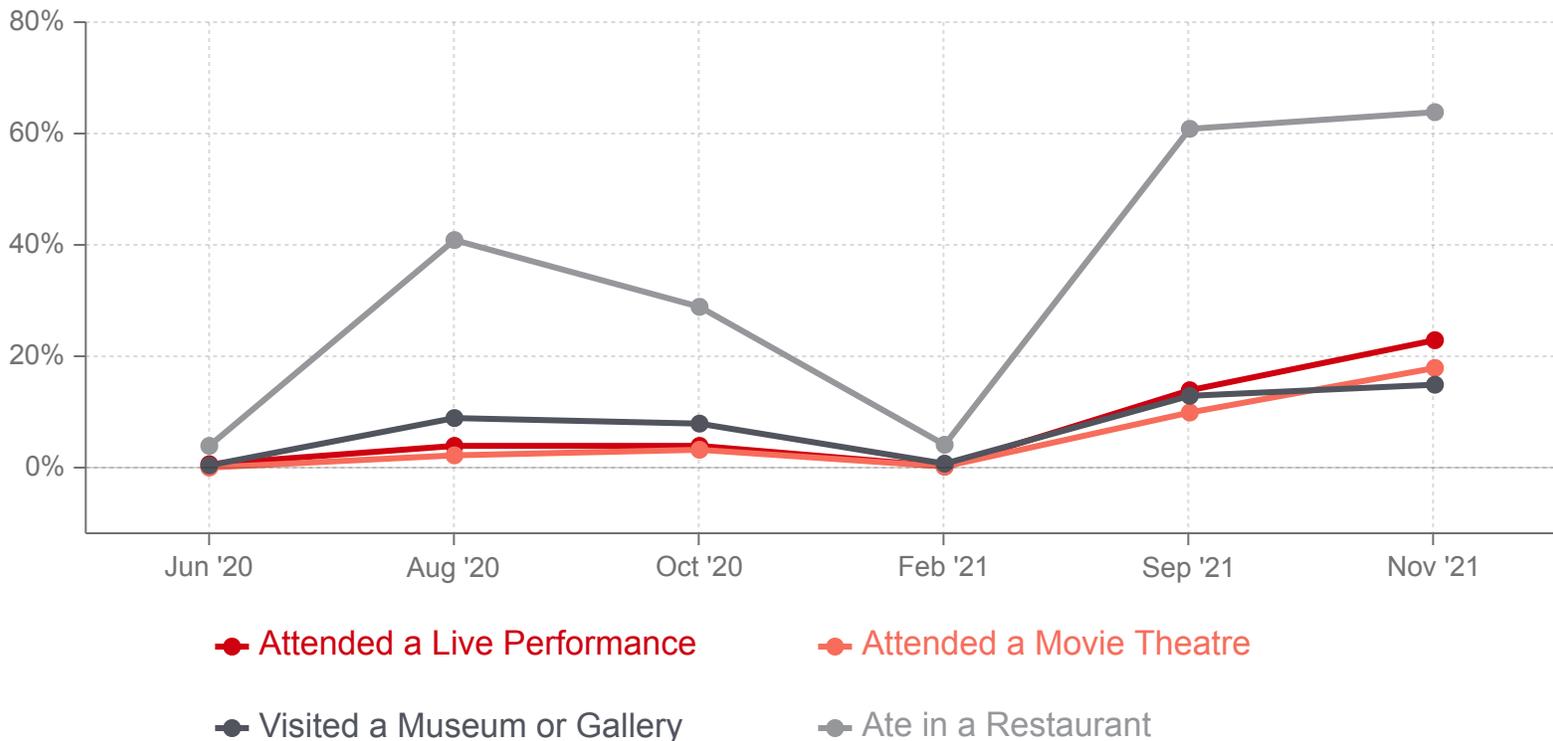
"People who are refusing to be vaccinated are probably also not adhering to other recommendations, and might be careless about mask-wearing and personal space. I don't want to be anywhere near them."

"I do not believe mandates are effective and therefore don't believe they are justified. Even if I decide to take a vaccine one day, I would not be able to participate in any activities that discriminate based on vax status with a clear conscience."

"I don't wish to support any businesses or establishments that enable (whether actively or passively) the anti-vaccine movement. Without a vaccinated-only policy, the company, in my view, would be enabling this movement."

Returning to In-Person Activities

Have respondents attended in-person activities in the last two weeks?

Legend:
- **Attended a Live Performance** (red)
- **Attended a Movie Theatre** (orange)
- **Visited a Museum or Gallery** (dark grey)
- **Ate in a Restaurant** (grey)

Many people report eating in restaurants, but not going to theatres quite yet. Why do you suppose some people feel comfortable going to restaurants but not theatres?

"Because people are seated closer together at arts events than at restaurants, and at restaurants you know the people who you are with and know their vaccination status."

"I did both recently. Being inside the restaurant was nerve racking, with people moving around the tables unmasked and not enough physical distance between the tables. In the theatre, there was spaced seating and masks were kept on for the entire performance (though intermission was anxiety provoking as people moved around far too closely)."

"You can go to restaurants at off hours when they're less likely to be crowded. You also have the option to take out if you don't want to stay."

Returning to In-Person Programs

Indoor Events

What is the minimum level of health safety measures that you require in order to attend an indoor cultural event this week?
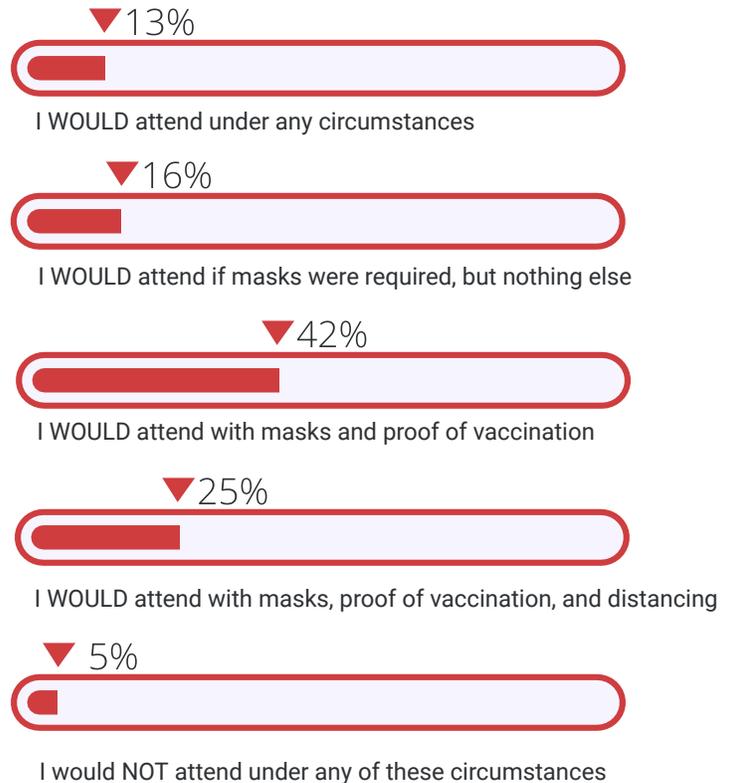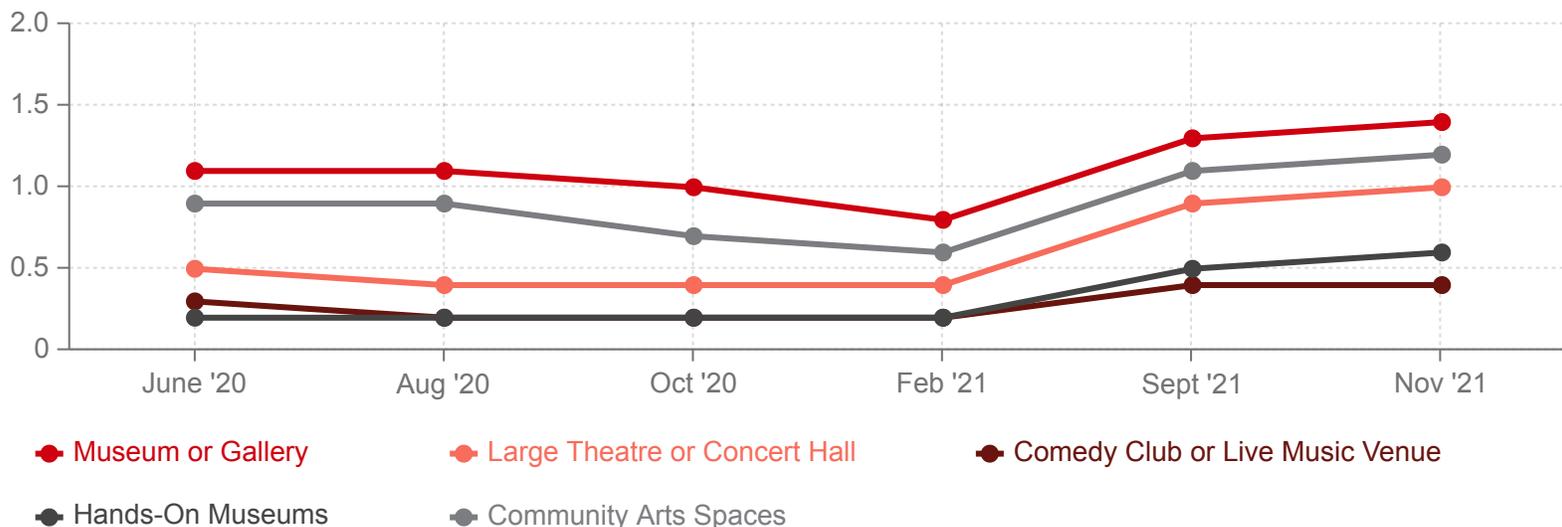
▼ 5%

I WOULD attend under any circumstances

▼ 3%

I WOULD attend if masks were required, but nothing else

▼ 43%

I WOULD attend with masks and proof of vaccination

▼ 40%

I WOULD attend with masks, proof of vaccination, and distancing

▼ 9%

I would NOT attend under any of these circumstances
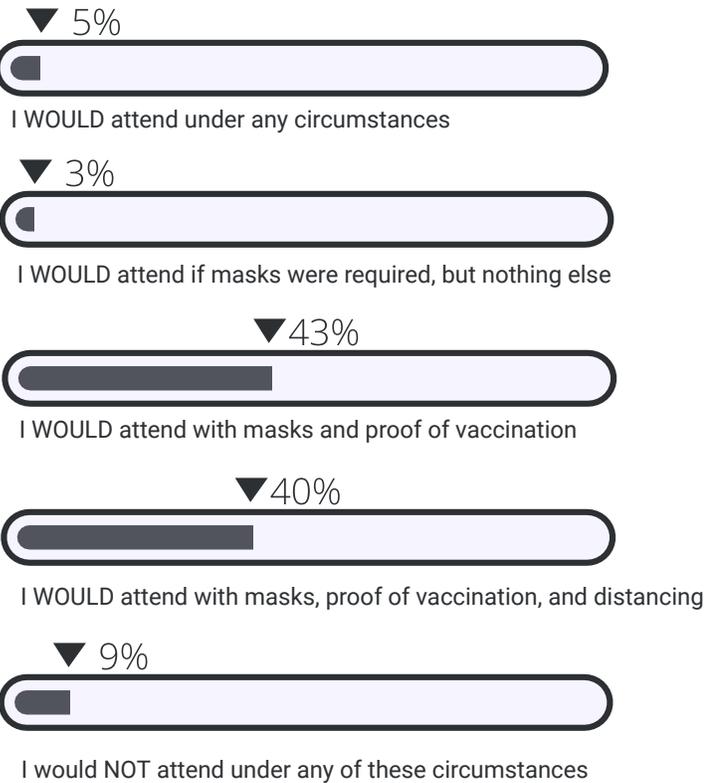
Outdoor Events

What is the minimum level of health safety measures that you require in order to attend an outdoor cultural event this week?

▼ 13%

I WOULD attend under any circumstances

▼ 16%

I WOULD attend if masks were required, but nothing else

▼ 42%

I WOULD attend with masks and proof of vaccination

▼ 25%

I WOULD attend with masks, proof of vaccination, and distancing

▼ 5%

I would NOT attend under any of these circumstances

Comfort Level Attending Different Cultural Facilities

0= Not Comfortable and 2 = Very Comfortable

- Museum or Gallery
- Large Theatre or Concert Hall
- Comedy Club or Live Music Venue
- Hands-On Museums
- Community Arts Spaces

In-Person Experiences

How comfortable did respondents feel at in-person events?

Performing Arts - Indoor
- 47% (Very Comfortable)
- 35% (4)
- 15% (3)
- 3% (2)

Museum or Gallery
- 58% (Very Comfortable)
- 30% (4)
- 10% (3)
- 2% (2)

Legend:
- Not at all comfortable
- 2
- 3
- 4
- Very Comfortable
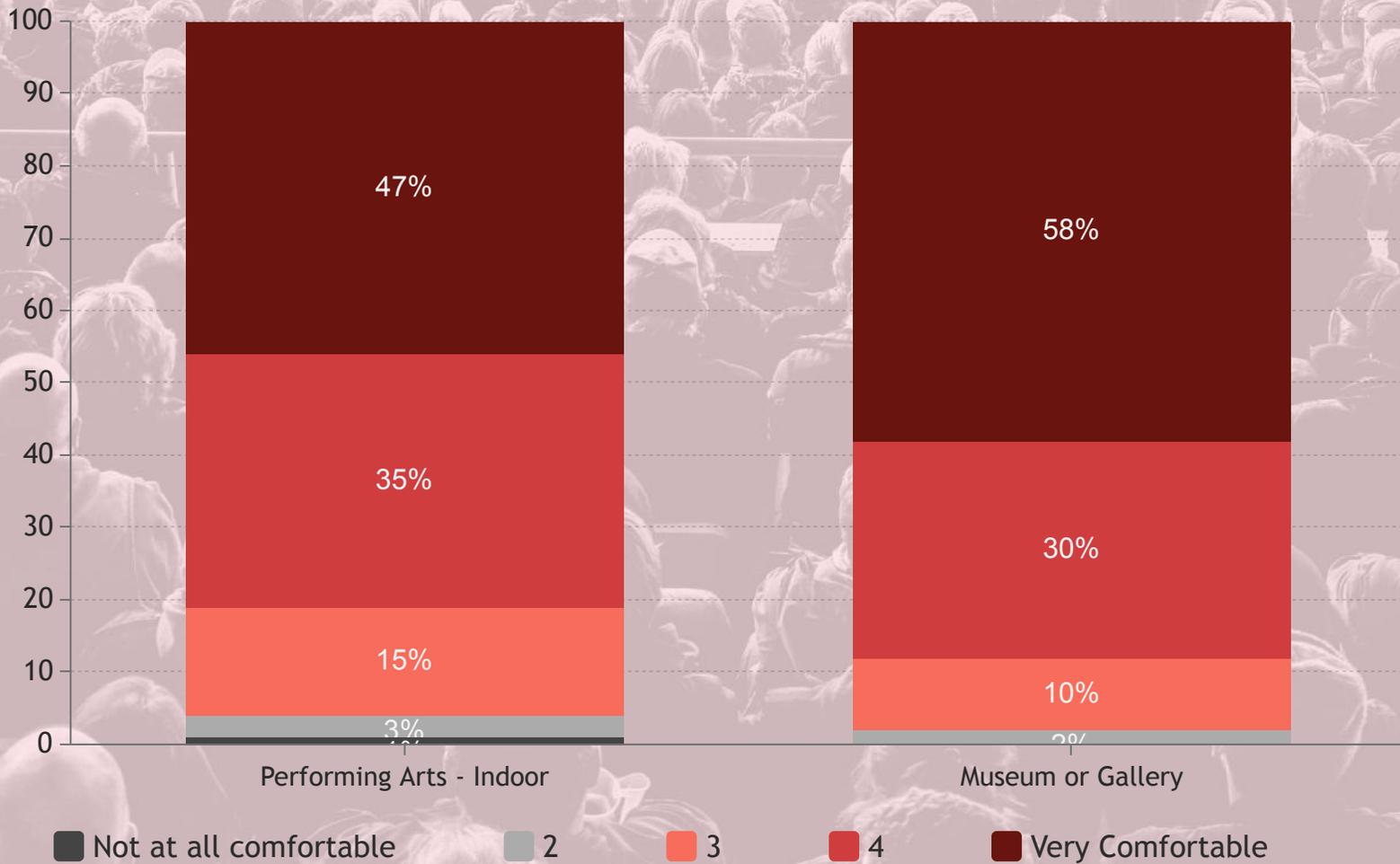
What would have made respondents feel more comfortable?

"Reduce capacity to allow for 2m physical distancing between patrons."

"Drinks were allowed in the venue and those around me had their masks off the entire time because they were drinking. I felt very unsafe."
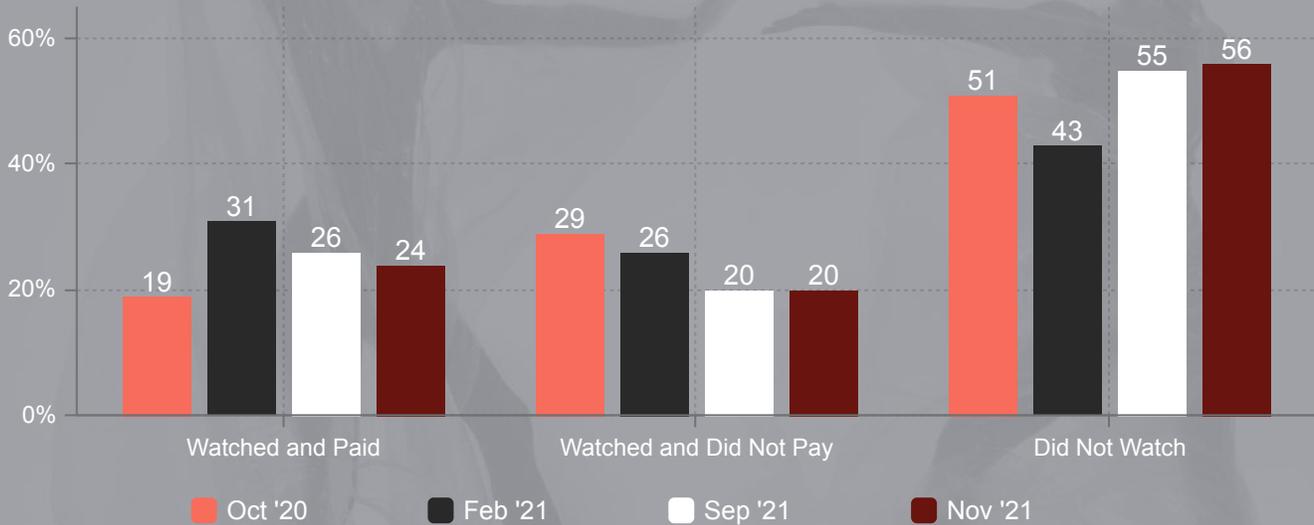
"Enforce mask wearing more thoroughly."

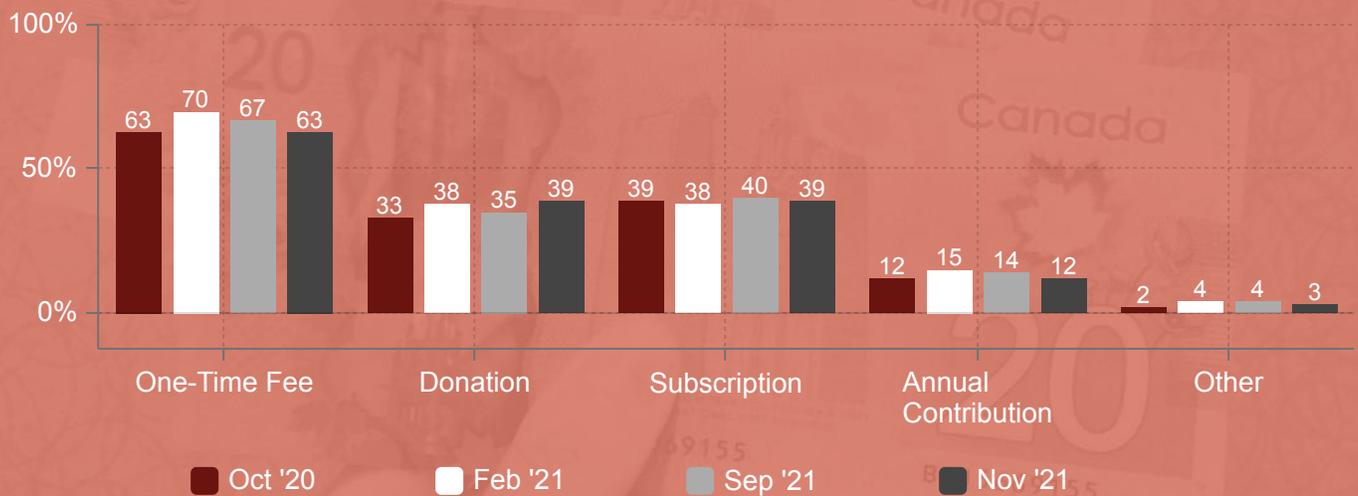*"Publish the air filtration practices and reports."*

"Restrict the amount of people and control the flow better. Close hands-on exhibits."

Engagement With Digital Programming

How did respondents engage with online cultural programs in the last two weeks?

Legend: Oct '20 | Feb '21 | Sep '21 | Nov '21

	Oct '20	Feb '21	Sep '21	Nov '21
Watched and Paid	19	31	26	24
Watched and Did Not Pay	29	26	20	20
Did Not Watch	51	43	55	56

How did respondents who paid for online cultural programs purchase those programs?

Legend: Oct '20 | Feb '21 | Sep '21 | Nov '21

	Oct '20	Feb '21	Sep '21	Nov '21
One-Time Fee	63	70	67	63
Donation	33	38	35	39
Subscription	39	38	40	39
Annual Contribution	12	15	14	12
Other	2	4	4	3

For more information about this study or to view results from cohorts in other countries visit audienceoutlookmonitor.com.

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