



AUDIENCE AND VISITOR ATTITUDES ABOUT ENGAGING WITH PITTSBURGH'S ARTS SECTOR DURING AND AFTER THE COVID-19 PANDEMIC

REPORT ON COVID-19 AUDIENCE OUTLOOK MONITOR
SURVEY RESULTS FROM SEPTEMBER 2020 TO MAY 2021



COMMISSIONED BY THE GREATER
PITTSBURGH ARTS COUNCIL AND
PREPARED BY WOLFBROWN



JUNE 2021



A MESSAGE FROM **Mitch Swain,** CEO

When the coronavirus pandemic first shuttered the arts and culture industry, the primary question that lingered in the minds of arts leaders was how to safely reopen as soon as possible. This question quickly became our guiding light as we stumbled through the pandemic. That's why the Greater Pittsburgh Arts Council joined WolfBrown to implement its COVID-19 Audience Outlook Monitor in Pittsburgh to illuminate exactly how we can safely welcome audiences back to museums, performances, art camps, and maker workshops.

Since September 2020, our Pittsburgh cohort of organizations sent the Audience Outlook Monitor survey to their constituents to track opinions, attitudes, and expectations for safe reopening and COVID-19. We quickly found that arts audiences trusted area arts organizations for safety and healthy updates more than the government. What's more – audiences were ready to come back to our facilities when it was safe to do so at higher rates than before the pandemic.

I hope our community takes comfort in these findings and finds them useful in their own reopening protocols, despite the turmoil that we have all experienced in the last year and a half.

Welcome back,
Mitch T. Swain



A MESSAGE FROM **André Solomon,** *Manager of Programs*

It has been my honor to coordinate the COVID-19 Audience Outlook Monitor with 27 arts organizations in the Greater Pittsburgh area. Despite the isolation and uncertainty that came with the pandemic, this survey project allowed our sector to operate outside our normal silos and collaborate to find joint solutions to issues we were all facing.

Because WolfBrown designed its survey with a cohort model in mind, it included community webinars, office hours, and constant collaboration. This summary report serves as a further way to collaborate and learn from each other. You'll find data points that may help you with decision-making in your own organization, guidance on digital and in-person programming, and even public health considerations.

While we have gleaned important information from this research project, we also found a severe gap in audience demographics in these surveys. In future reports, we hope to focus on younger and BIPOC arts audiences in Pittsburgh, as well as artists. Browse this report with curiosity but know that future research is needed to have a complete view of audience attitudes and needs.

Thank you,

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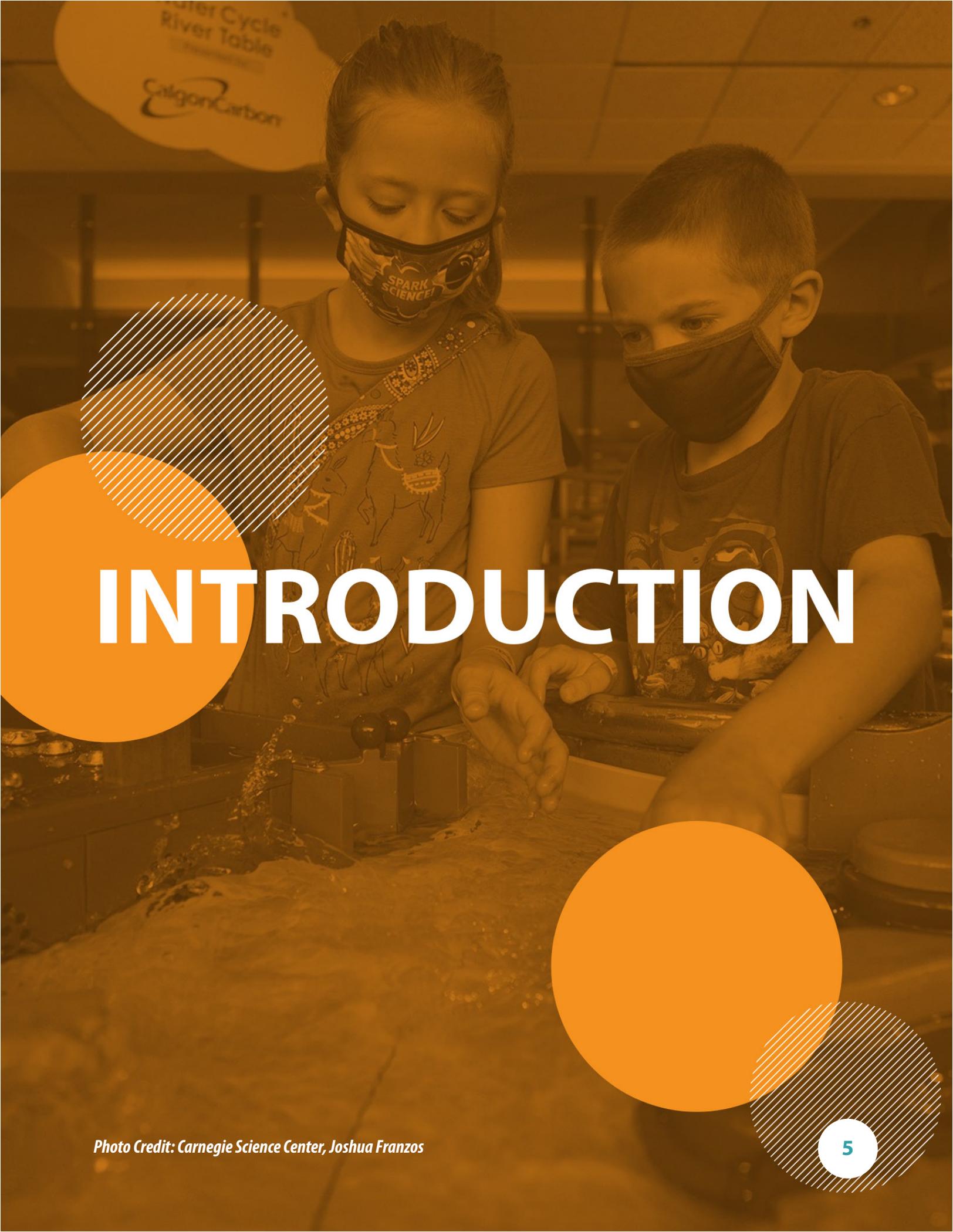
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INTRODUCTION

Photo Credit: Carnegie Science Center, Joshua Franzos

About This Study

In September 2020, the Greater Pittsburgh Arts Council (GPAC) commissioned WolfBrown to conduct its COVID-19 Audience Outlook Monitor study with a cohort of arts and cultural organizations in the Pittsburgh region. The COVID-19 Audience Outlook Monitor is designed to help organizations understand how and when audiences and visitors will feel safe attending in-person events and how they are engaging with arts organizations during closures. The study is also being deployed through cohorts of arts organizations in other cities across the U.S. and internationally.

Over the course of this study 27 Pittsburgh arts organizations have participated by deploying the survey to samples of their audiences/visitors over regular intervals of time. Since September 2020, the survey has been deployed six times and a total of 9,457 responses have been collected. Additional rounds of surveys will be deployed later this year.

We would like to thank the following participating organizations, and their audiences, for making this report possible.

Attack Theatre
August Wilson African
American Cultural Center
Bricolage Production Company
Carnegie Museum of Art
Carnegie of Homestead's Music Hall
Children's Museum of Pittsburgh
City of Asylum
Contemporary Craft
Heinz History Center
Holocaust Center of Pittsburgh
Jergels
Kelly Strayhorn Theater

Mattress Factory
MCG Jazz
Mr. Smalls Theatre
New Hazlett Theater
PearlArts Studios | STAYCEE PEARL dance
project & Soy Sos
Pittsburgh Center for Arts and Media
Pittsburgh CLO
Pittsburgh Glass Center
Pittsburgh Opera
Pittsburgh Public Theater
Point Park University, Pittsburgh Playhouse
Silver Eye Center for Photography
Texture Contemporary Ballet
The Frick Pittsburgh
Touchstone Center for Crafts

Respondent Pool

This study surveys local arts audiences. All respondents to the study have either purchased a ticket or membership offered within the last three years by the organization that sent them the survey. All respondents also live in Pennsylvania, West Virginia, or Ohio for at least part of the year.

As you read the results below, it is important to note that we are looking at data from active arts audiences, not the general population. Because of the population studied, we see high levels of commitment to arts and cultural organizations. Further, the demographic breakdown of respondents reflects the audiences of the participating organizations and does not necessarily match the demographic breakdown of local residents.

Looking at all rounds of data collection, we see that the average age of survey respondents is 56, with 35% of respondents reporting that they are over 65. With regard to the racial/ethnic breakdown of survey respondents, 95% identified as white, 2% identified as Black or African American, 1% identified as Asian or Pacific Islander, 1% identified as Hispanic, Latino/a, or Latinx, and less than 1% identified as Middle Eastern or American Indian or Native Alaskan. Two percent identified as a race or ethnicity not listed and chose to write in their identity.

Study Limitations

The Arts Council recognizes that this data represents only a slim piece of the overall picture regarding the attitudes and opinions of all arts audiences in our region. This white-leaning demographic breakdown could be attributed to several issues within the arts community, including lack of access to Internet or email to take the surveys, lack of interest in taking online surveys, predominantly white and older audiences attending in-person events, and lack of diversity in the organizations represented within the survey cohort.

In addition, the nature of the Audience Outlook Monitor also imposed participation requirements that limited the type of organizations that could participate. These requirements included an email list of at least 3,000 people. Survey questions were also not catered to all art disciplines or art education. Finally, some organizations declined participation in this report simply due to lack of capacity during the pandemic.

Key Takeaways

Data as of May/June 2021

1. May data from Pittsburgh shows that 90% of respondents are fully or partially vaccinated. As of June, audience vaccination has likely plateaued at +/- 95% nationally. Despite high vaccination rates, one-third of respondents are still reporting that a member of their family or household is vulnerable to a serious health outcome from contracting COVID-19.

2. Demand for in-person events is resuming. Hypothetically, 67% of Pittsburgh respondents would attend an indoor event with health safety measures and 89% reported they would attend an outdoor event with health safety measures (May data).

3. As of May, 46% of vaccinated Pittsburgh respondents were not ready to go out yet. Many vaccinated respondents were still waiting for infection rates to drop to lower levels. In other cities, the figure has dropped to approximately 35% for June.

4. Eleven percent of respondents don't foresee going out again to performing arts events until January 2022 or later. This number drops to 8% for visiting museums. This underscores the importance of continued efforts to engage audiences through online programs who won't be ready to return for some time.

5. National data shows that the conditions under which people would go out in June vary greatly. For example, 40% won't attend without a mask mandate, while 14% won't attend with one. Further, 27% won't attend without a vaccinated-only admittance policy, while 17% won't attend with such a policy. Respondents on both sides have very strong feelings. Determining which health safety policies to implement will be challenging and waiting as long as possible to announce specific policies may be the best option.

6. Even as vaccination rates rise, COVID-19 is not likely to disappear completely. There will continue to be COVID-19 cases. Visitors and audiences are beginning to understand this and learning to navigate the post-vaccination world, including what risks they are and are not willing to take.

7. As local outbreaks of COVID-19 may continue for quite some time, especially as new variants arise, **reverting to vaccinated-only admittance policies (where legal) may be one way of weathering fluctuations in local epidemiological conditions**, as media coverage of local outbreaks is likely to raise concern amongst some audience members.

Communications Advisory

Survey results reflect a wide range of attitudes among audiences and visitors from their experience of the pandemic, from when they'll feel ready to return in-person, to how they're staying engaged at home. This diversity of attitudes toward returning points to the importance of clear and frequent communications about re-opening and what steps are being taken to keep audiences and visitors safe. To support this work, we've put together a series of high-level communications recommendations, drawing from the survey results as well as qualitative follow-up research.

Empower audiences and visitors to make their own decisions about when they'll feel comfortable attending.

While the data shows that respondents are increasingly comfortable attending in-person events, there is still a sizable pool of respondents who aren't ready yet. Some of these respondents are vulnerable to COVID-19 or have vulnerable family members and won't feel comfortable for some time. It is important to celebrate those who are ready to return in your communications while also making sure audiences and visitors feel supported in the decision to wait to return.

Audiences are curious about artist safety and staff safety; communicating with them about this topic will build confidence.

Audiences and visitors value your artists and staff. They want to know that deciding to attend won't put artists at risk. It is helpful to communicate your policy for artist and staff safety to your audience. For example, is your staff vaccinated? Do you have a mask policy to protect the artists on stage?

Provide information about health safety procedures in “layers,” so people can access the level of detail they want (or none at all).

Focus groups with arts audience members have highlighted that individuals vary greatly in their interest in details about health safety policies. While some visitors or audience members want to know about every element of your health safety policy and how it will be enforced, others will just want the highlights. Make it easy for audiences to skim or dive deep into policies.

Acknowledge uncertainty about health safety measures – what is known, what is not known, and how you are navigating the uncertainties. Whenever possible, wait to announce specific policies.

Conditions have changed rapidly over the past few months and the landscape will continue to change. As arts organizations work to keep up with local and state policies, it can be difficult to know what health safety policy will be appropriate at an event a month or two from now.

Given the conflicting viewpoints among audiences and visitors about policies, such as mask requirements, the best strategy may be to be transparent with audiences about changing circumstances and hold off on announcing specific policies, when possible, at least with respect to masks. This will give you time to see how local policies and audience sentiments change over the coming weeks and months.

Provide re-entry opportunities (e.g., dry-runs; video orientations) for visitors.

Audience members and visitors who are unsure about coming back may need resources beyond the written health safety plan. Creating videos about the experience of returning, how they'll enter the building, how seating will work, etc. may help them feel comfortable and prepared for how the experience might be different from the last time they attended. It may even be helpful to open your venue for small events to allow audiences and visitors see firsthand how things have or have not changed.

Value audiences who are not ready to attend in-person and continue to engage them in other ways.

Not everyone is ready to return to in-person events. Audiences and visitors who are not ready to return have good reasons for their concern such as traumatic experiences with COVID-19 or vulnerable individuals in their family or social circle. It is important to speak to this group in your communications and offer other ways to engage with your organization until they are ready to return. Continuing digital programming even after you re-open is one way of providing opportunities for those who do not feel comfortable attending in-person.

Allow audiences to bail out if they don't feel comfortable (and get a refund).

With circumstances rapidly changing, audience members and visitors may not feel confident buying a ticket if they don't know that they have the option of deciding not to attend closer to the event and receiving a refund if they ultimately don't feel comfortable. This is also a good way to make sure that audiences and visitors who feel sick or are concerned about being exposed to COVID-19 know they will receive a refund if they stay home.

Reference results about success with vaccination from the Audience Outlook Monitor study in blogs or newsletters.

The study shows that vaccination rates among arts audiences and visitors are significantly higher than in the general population. With 90% of respondents vaccinated as of May, even without a vaccinated-only admittance policy the rate of unvaccinated attendees at arts and cultural events should be quite low. Sharing these vaccination rates with your patrons is a good way of building confidence.



RESULTS

DEMAND FOR LIVE EVENTS AND COMFORT IN ARTS AND CULTURAL VENUES

Survey responses suggest that local arts audiences and visitors are closely following the news and well informed about the COVID-19 pandemic. In each wave of data collection, respondents were asked about their perception of whether COVID-19 infection rates were increasing, decreasing, or holding steady. **Figure 1** paints a clear picture of the local pattern of surges in infection rates, and recent improvement.

Respondents' comfort levels in a wide range of cultural venues are being monitored regularly through the survey. **Figure 2** illustrates how comfort levels with different types of venues remained relatively low throughout the fall and winter and began to rise in the spring. The chart also shows how respondents feel more comfortable in outdoor venues where they have a greater ability to control their distance from other people, such as museums, zoos, or outdoor festivals.

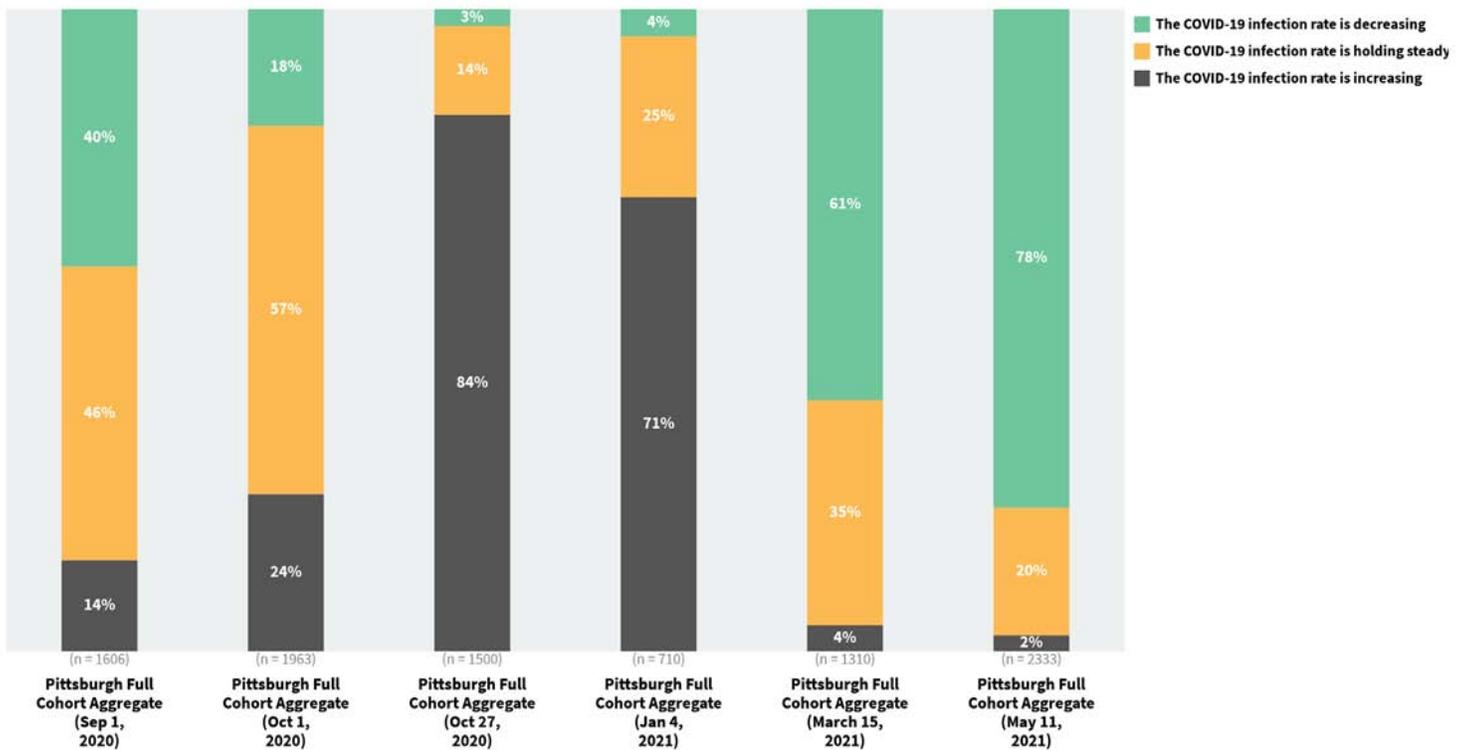


Figure 1. To the best of your knowledge, which one of the following statements best describes the current conditions in your region?

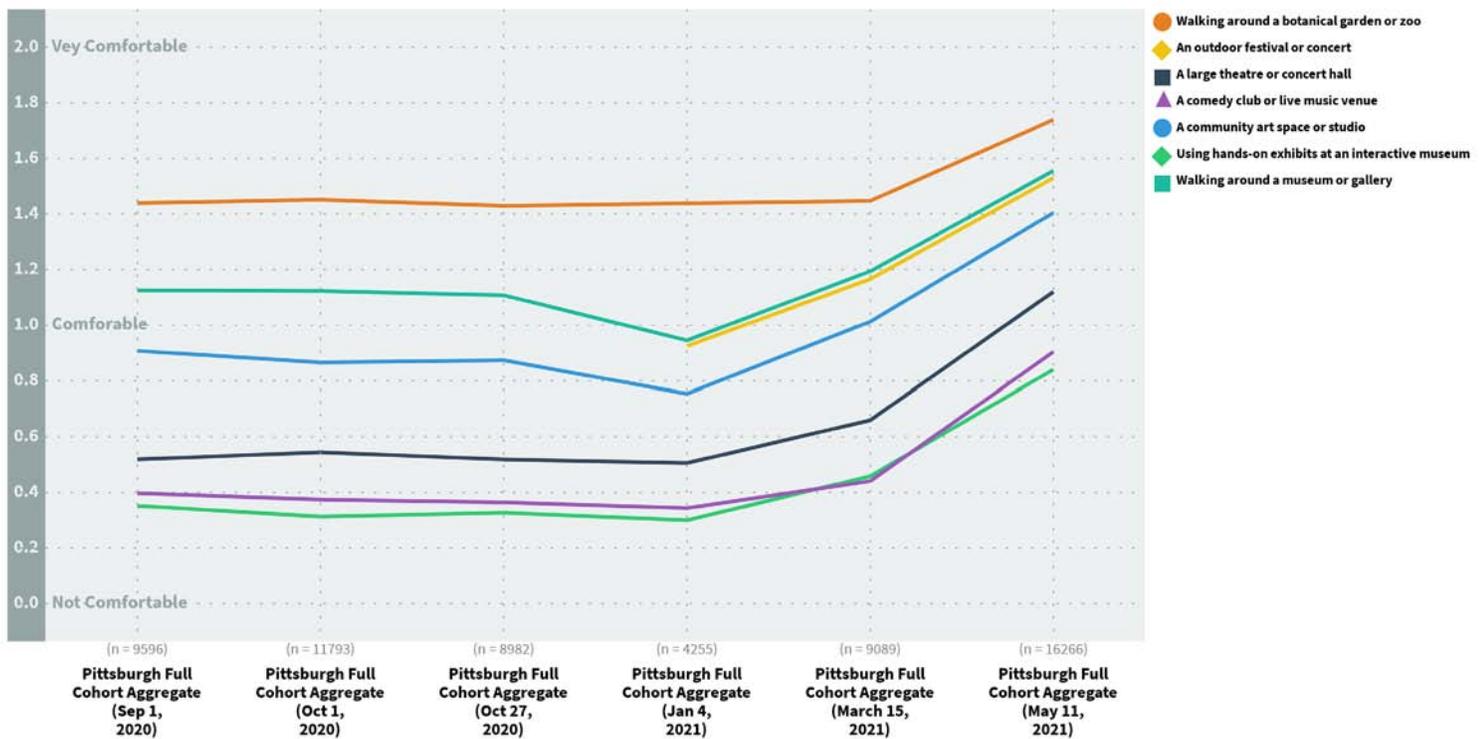


Figure 2. How comfortable would you feel attending the following types of cultural facilities today, assuming they were open and following social distancing guidelines and other health safety procedures?

In May, respondents were asked if they would attend both indoor and outdoor cultural venues this week if they had the opportunity. Respondents reported a lower level of comfort in indoor venues, with 33% saying they would not attend. Another 19% said they would attend but only if masks and distancing were required, and half said they would attend if masks are required, but not distancing.

In contrast, only 11% respondents reported that they would not attend an outdoor event. Sixty three percent would attend an outdoor event with a mask requirement, but no distancing, and 26% would only attend with both masks and distancing.

Since Pittsburgh’s last round of data collection in May, the CDC dropped the mask requirement nationally and some regions began lifting mask requirements. The study’s Detroit, MI cohort deployed the survey in June after new questions were added to test willingness to attend with and without mask requirements. Between May and June, we saw a rise in willingness to attend in-person overall. The Detroit results found that 66% of respondents would attend an outdoor event under any circumstances (only 2% would not attend under any circumstances) and 37% of respondents would attend an indoor event under any circumstances (only 13% would not attend under any circumstances).

To fully understand this rising comfort attending in-person events, particularly without masking and distancing, it is important to understand how different segments of respondents feel about returning. **Figure 3** shows that respondents who have a member of their household that is vulnerable to a serious health outcome from contracting COVID-19 are almost twice as likely to report that they would not attend an event this week. This group is actually a large percentage of the sample, even with high vaccination rates among respondents; in May, 36% of respondents reported having a vulnerable family/household member.

Results also show that vaccination status is not necessarily a key driver of readiness to attend events. In May, only 14% of unvaccinated respondents said they would not attend an indoor event compared to 34% of vaccinated respondents. While this may seem counterintuitive, unvaccinated respondents have consistently reported lower levels of concern about the pandemic across surveys and cohorts. Unvaccinated respondents are also more likely to be younger than vaccinated respondents.

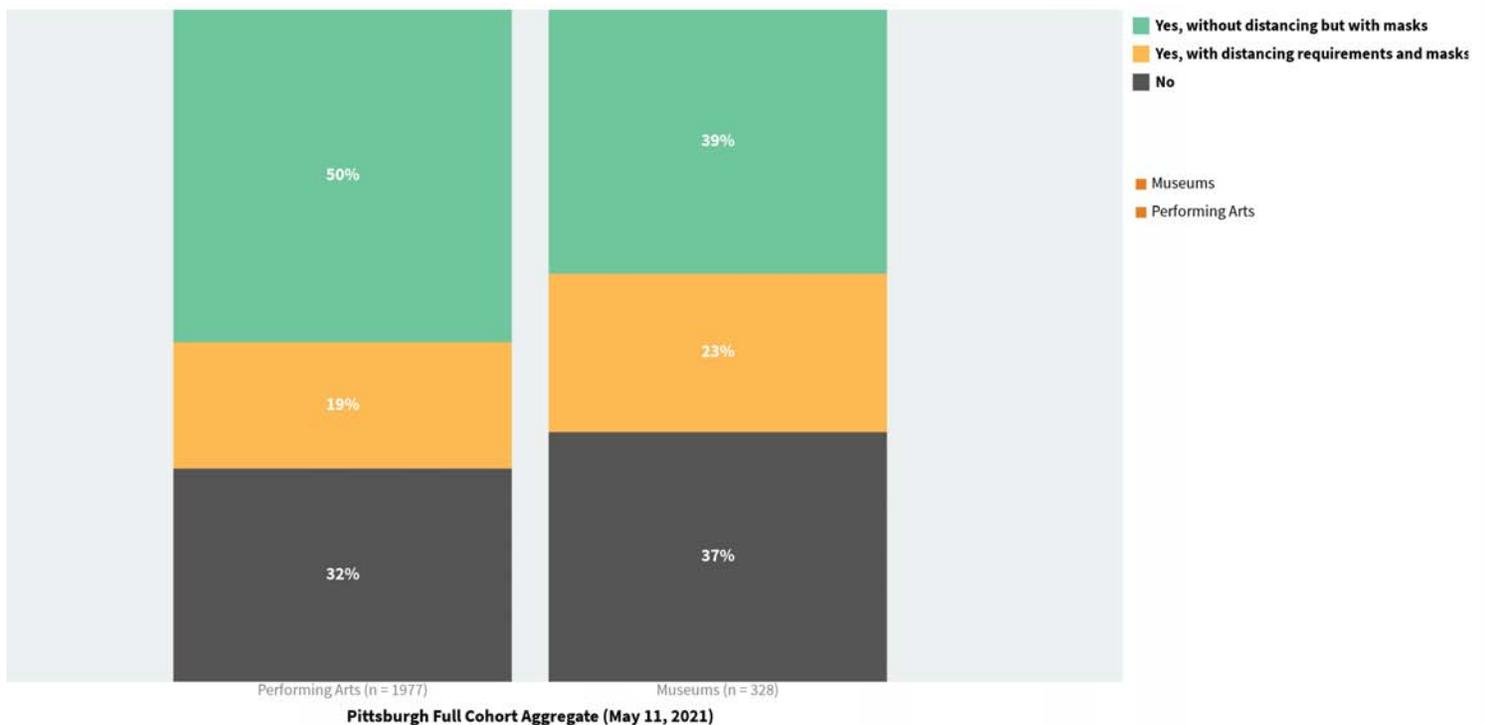


Figure 3. *If given the opportunity, would you attend an indoor cultural event this week?*

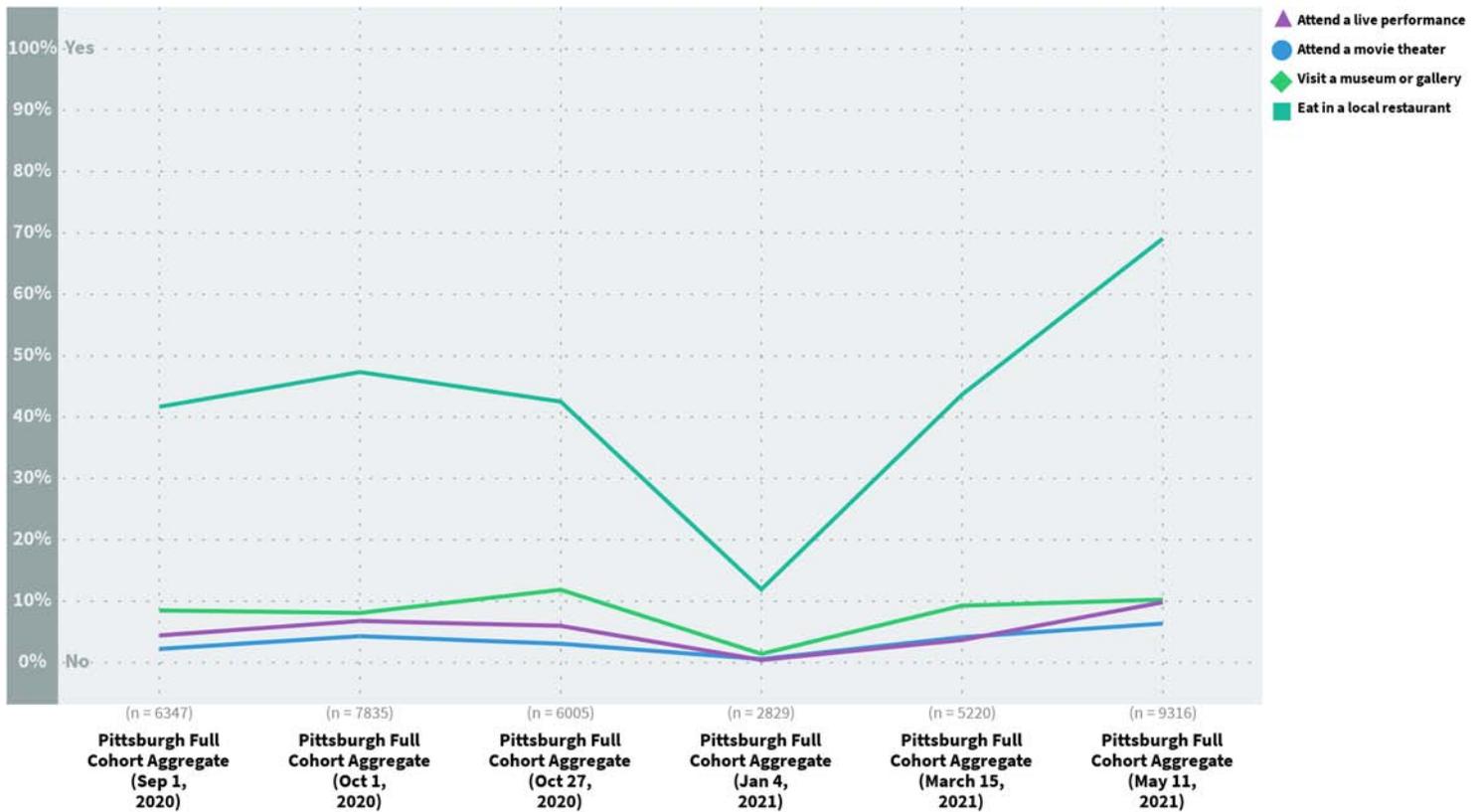


Figure 4. In the past two weeks, did you do any of the following activities in-person (not online)?

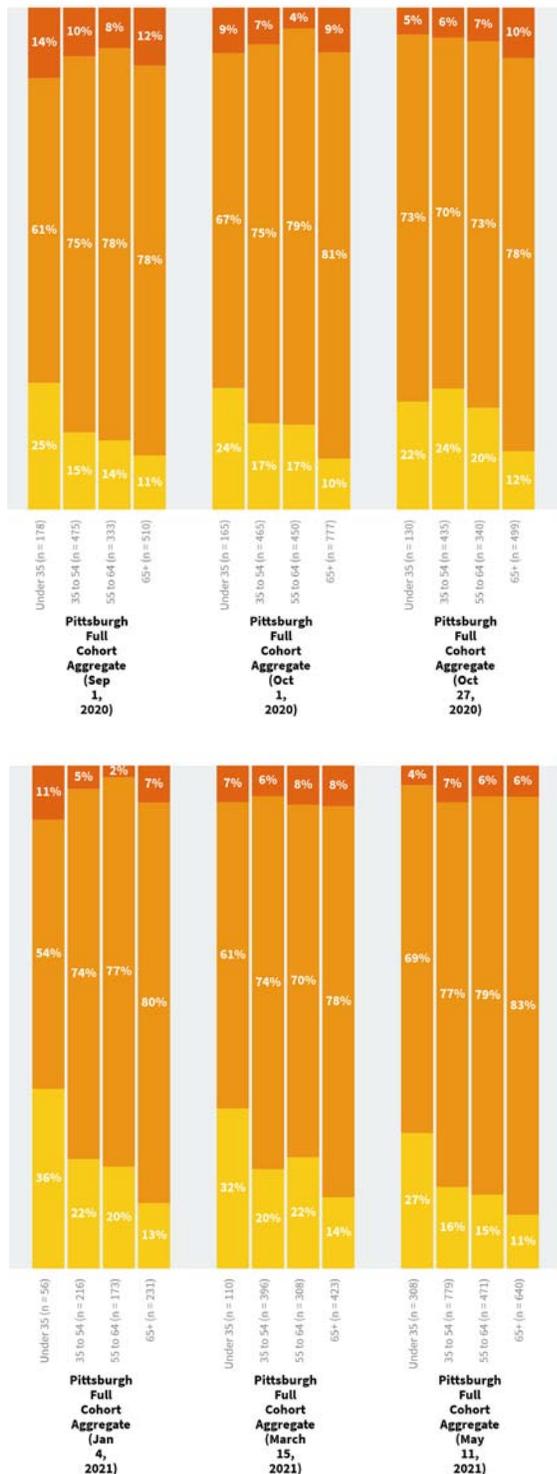
In addition to exploring comfort levels and willingness to attend, the study also asks respondents about their actual behavior over the last two weeks, including their attendance at arts and cultural events and ticket purchasing behavior for future events.

As **Figure 4** illustrates, levels of attendance at arts and cultural events have been relatively low throughout the study. Reported attendance dipped to its lowest level in January when the surge in cases was high and some Pennsylvania businesses were shut down. Attendance began to rise again in March. It is important to note that many arts and cultural venues have not been open during the pandemic so the results most likely reflect a combination of lack of options and lack of comfort.

Attending restaurants may be a leading indicator of demand for cultural events. Sitting in a restaurant with other people who may or may not be vaccinated is not entirely different from sitting in a theater with other people who may or may not be vaccinated. The percent of respondents who reported going out to a restaurant in the last two weeks in May surged to 69%.

Despite relatively low levels of attendance at arts and cultural events, we did see a significant increase in ticket purchasing behavior. In May, 21% of respondents reported buying tickets for live music events - almost four times the rate in March - and 11% of respondents reported buying tickets to a museum or gallery (almost twice the rate in March).

COMMITMENT TO AND TRUST IN ARTS AND CULTURAL ORGANIZATIONS



The study includes questions aimed at understanding how the pandemic is impacting audience and visitor relationships with their local arts and cultural organizations and their attitudes toward attending arts and cultural programs in the long-term. Over the course of the study respondents have consistently reported that they expect to attend as much or more than they did before the pandemic (**Figure 5**).

On average, only 8% of respondents expect to attend less than they did before the pandemic, though respondents under 25 are more than twice as likely as respondents over 65 to report that they plan to attend more often long term.

The survey includes open-ended follow-up questions probing why respondents anticipate higher or lower attendance in the long term. Those who reported that they expect to attend more often shared that this period of time without access to in-person arts and culture has only strengthened their belief in its importance.

- Expect to attend less than before
- Expect to attend same as before
- Expect to attend more than before

Figure 5. How will your attendance at arts and cultural activities be affected by the pandemic in the long-term, given your personal circumstances?

These respondents have missed arts and cultural programs and are acutely aware of the hole that has been left in their lives without them. They are eager to take full advantage of offerings when they return. Other respondents are aware of the challenges arts and cultural organizations have faced over the last year and want to do their part to support them when they return.

Among respondents who reported that they expect to attend less often in the long term, many shared that their concerns about the safety of attending are likely to linger. Respondents also shared that they don't trust other audience members or that they have unvaccinated children or other members of their household who are vulnerable to COVID-19 and will therefore be extra careful.

"Because the pandemic made me realize how important cultural entertainment is in my life and I don't want to miss any chance to enjoy it in the future. Moreover, I believe that people in the cultural entertainment business are the ones that paid the highest price of the pandemic and yet respected CDC rules and didn't complain much. For this, they deserve our support and we all should attend events more often to allow theatres, museums, cinemas to recover as soon as possible."

"So many groups/venues/etc. were so creative and provided free education and entertainment when we really needed it, we want to show our appreciation and support to our old and new favorites."

"I feel as though I have come to realize just how important human aspects of society are and also the need to appreciate the raw emotions which accompany arts experiences."

"Until this pandemic is better under control I will avoid any crowds or gatherings. You can not trust others to be doing the correct thing during these times. People are potentially being exposed but still are going out."

"Comfort level with unvaccinated small children."

"First, I don't have a lot of wiggle room in my budget. Second, I don't like being near other people."

A selection of open-ended responses from survey participants

In addition to their commitment to arts and culture in general, respondents have reported consistently high levels of eagerness to return to the organizations that sent them the survey. In May, 51% of respondents reported that they are “very eager” to return, with only 5% reporting that they are “not at all eager” (Figure 6). Not surprisingly, donors and members displayed even higher levels of eagerness to return.

Finally, respondents also place very high levels of trust in the organizations that sent them the survey. More than eight in 10 respondents agree with the statement, “I trust the organization that sent me this survey to implement and enforce health safety rules for all audience members or visitors.” Together, these findings paint a picture of an audience/visitor base that is deeply committed to arts and culture and eager to come back, but that is also concerned about the pandemic and will be willing to come back at different times and under different conditions.

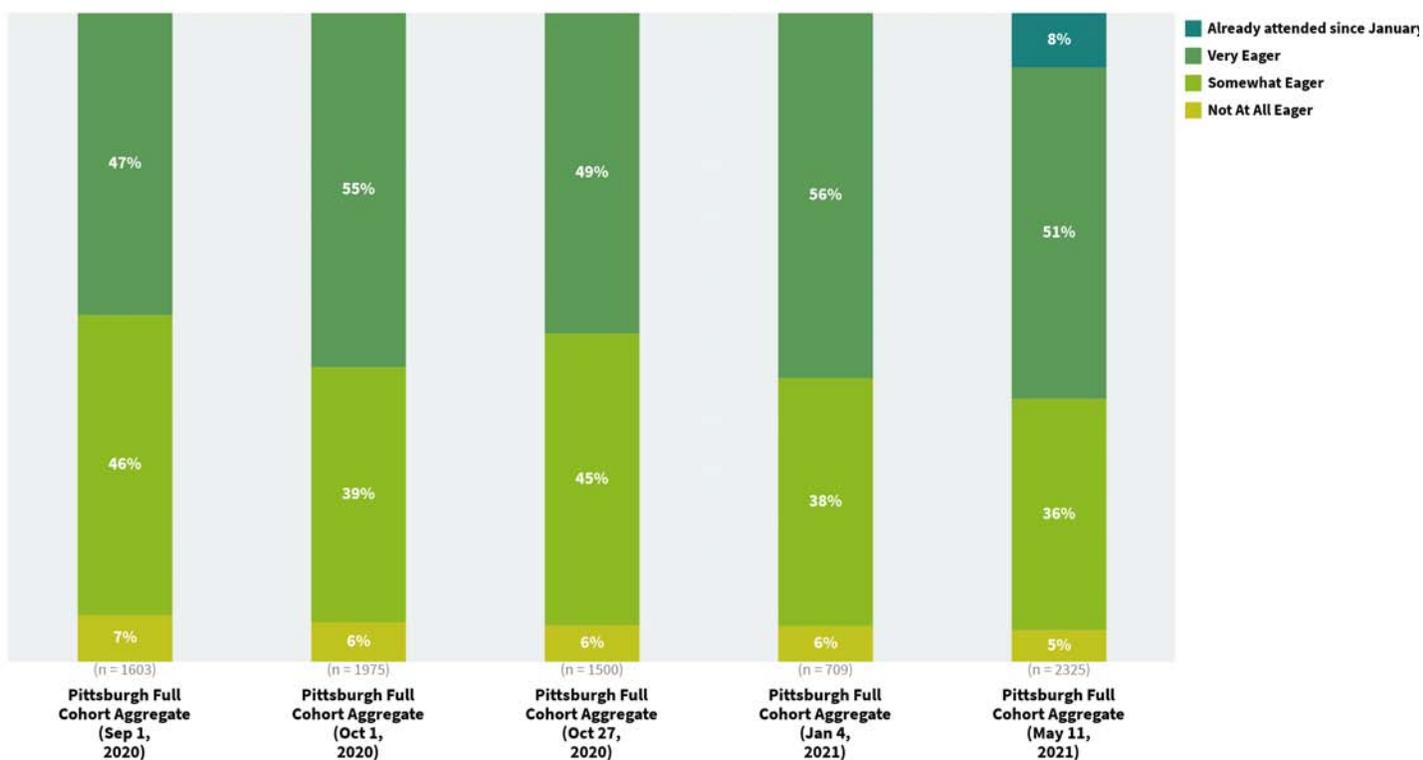


Figure 6. In general, how eager are you to return to the organization that sent you this survey?

VACCINATION RATES & READINESS TO RETURN POST-VACCINATION

We've seen remarkable uptake of the COVID-19 vaccine among respondents in Pittsburgh and around the country. By May, vaccination rates had jumped to 90% among respondents. According to the CDC, 70% of Pennsylvania adults are fully or partially vaccinated as of June 16th. Thus, arts and cultural audiences have a significantly higher vaccination rate than the general population. In fact, theatres and museums could be some of the safest places to visit in the coming months.

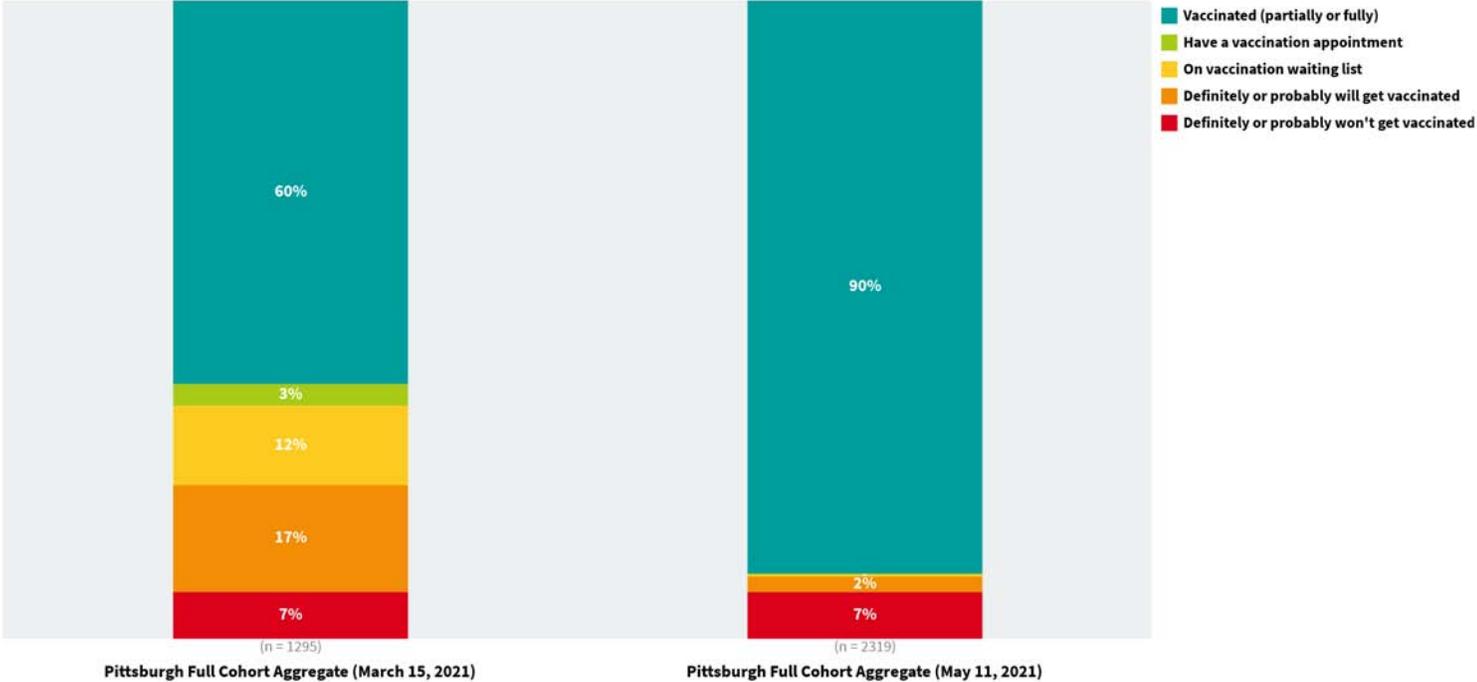


Figure 7. Vaccination Progress

By May, most respondents who wanted a vaccine had received one, with very few reporting that they are on a vaccine waiting list, have an appointment, or plan to get the vaccine (Figure 7). We also see that the 7% of respondents who reported that they definitely or probably won't get vaccinated has held steady.

The survey asks vaccinated respondents when they'll be ready to return to in-person cultural events. The percent of vaccinated respondents who reported that they're ready to return rose from 30% to 54% between March and May. During this period, the percent of respondents who reported that they're waiting for other members of their family or social circle to be vaccinated decreased, as would be expected.

However, a significant percentage of respondents (35% in May) reported that they won't go out until infection rates fall further. Different audience segments report different levels of readiness to return. **Figure 8** illustrates that only 41% of vaccinated respondents with a serious vulnerability to COVID-19 in their household are ready to return compared to 63% without a vulnerability.

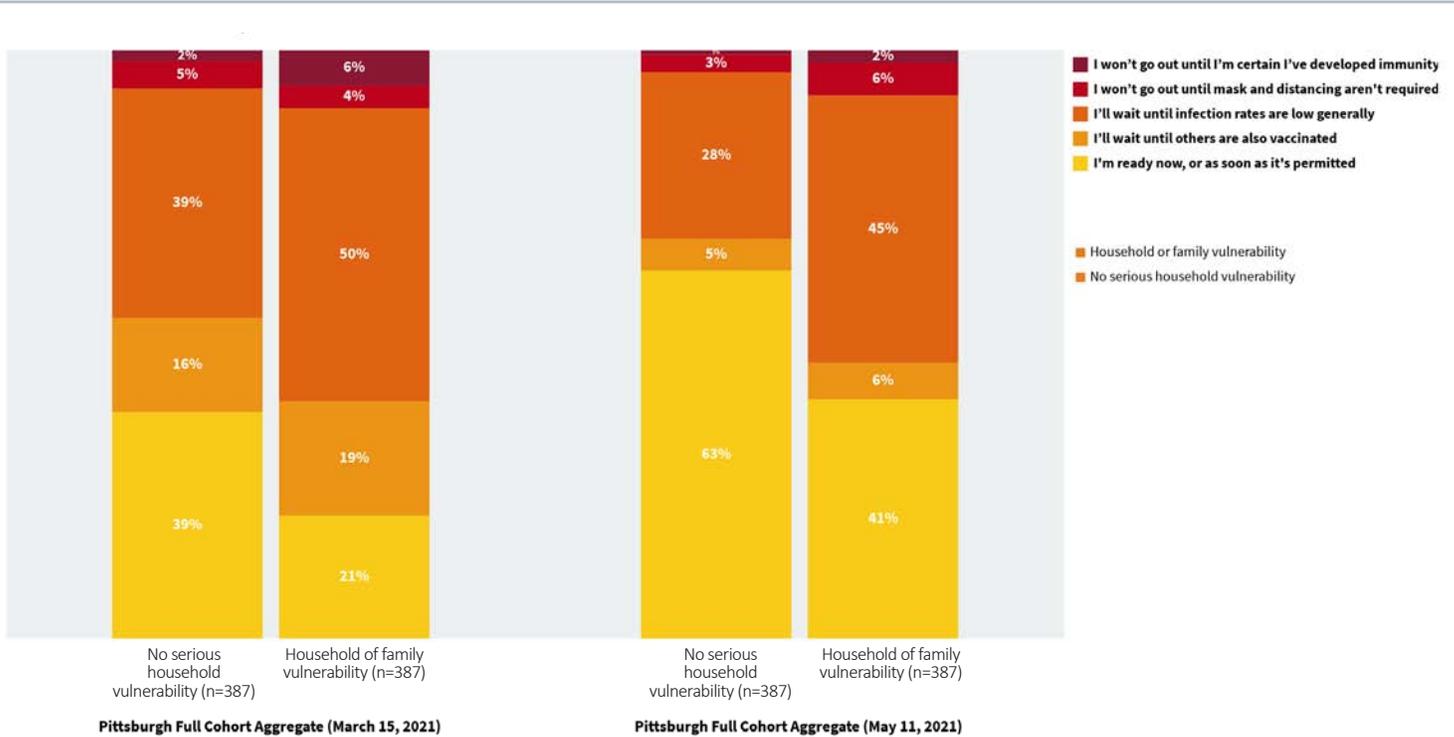


Figure 8. Now that you've been vaccinated, which statement best reflects how you feel about going out to cultural events?

The survey probes a number of concerns that respondents may have even after vaccination. Between March and May, we saw concerns decrease overall. Respondents expressed low levels of concern that they might not have developed immunity. They expressed moderate levels of concern that they might transmit the virus, about how lasting their immunity will be, and that the people they usually attend cultural events with are not yet vaccinated.

The survey asks unvaccinated respondents about their barriers to being vaccinated. Overall, respondents did not experience many barriers. In March, 27% reported challenges finding information about how and where to get vaccinated but by May this number had dropped to 2% with 88% of respondents reporting no barriers. It is important to note that in general, arts audiences have higher income and education levels than the general population and would therefore be likely to experience fewer barriers to receiving the vaccine.

Among those who do not plan to be vaccinated there are very high levels of distrust. In May, 85% of respondents who do not plan to be vaccinated do not trust that the COVID-19 vaccine is safe enough. Much of this concern is isolated to the COVID-19 vaccine as only 45% of respondents who do not plan to be vaccinated reported that they are opposed to or have serious reservations about vaccines in general.

Finally, the survey asks respondents to estimate, given what they know about infection rates and success with vaccine roll-out, when they think they will resume attending in-person events. Not surprisingly, respondents to surveys sent by museums expect to be back at museums earlier than respondents to surveys sent by performing arts organizations.

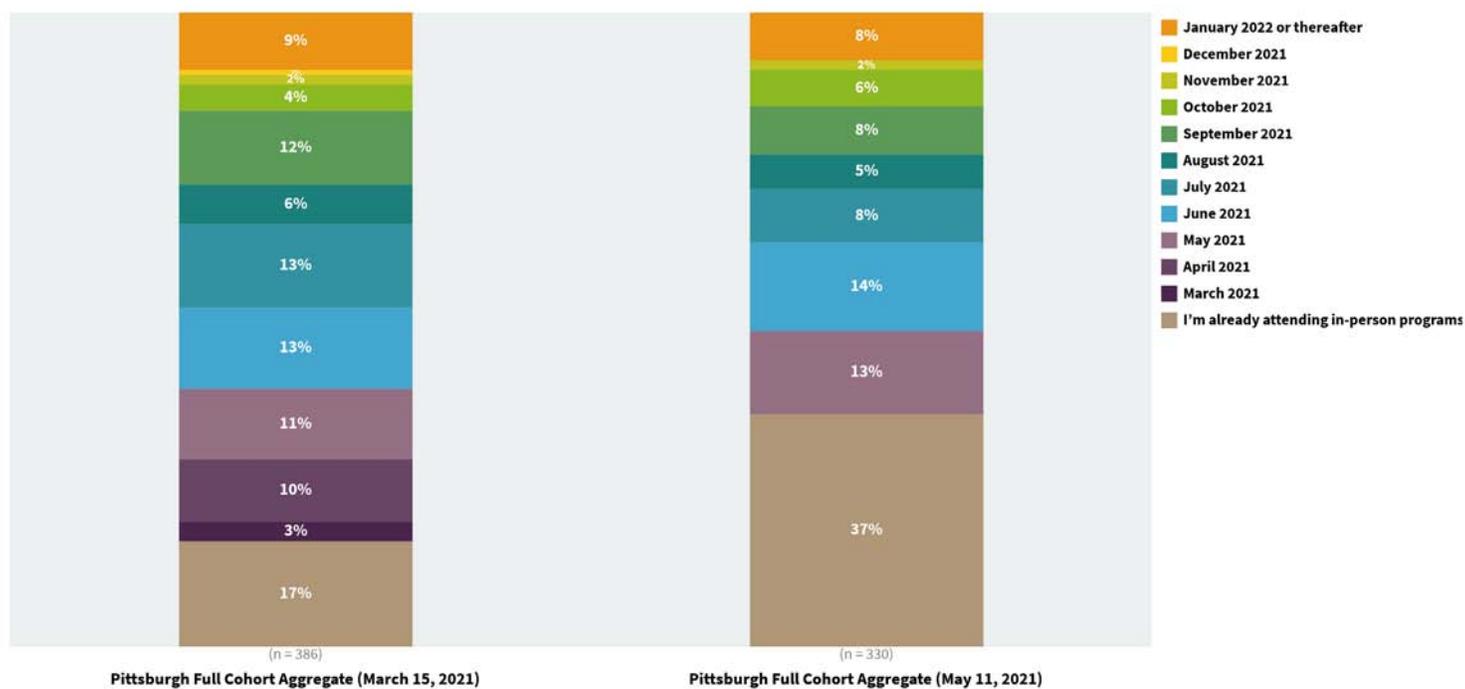


Figure 9. Museums

Figures 9 and 10 show that 50% of respondents expect to return to museums by or before May. Only 8% reported that they don't expect to return in 2021. Meanwhile 50% of respondents expect to return to performing arts events by or before June, while 11% reported that they don't expect to return in 2021. Isolating respondents with a vulnerability to COVID-19 in their household, we find that 18% don't plan to return to performances in 2021 and 11% don't plan to return to museums in 2021.

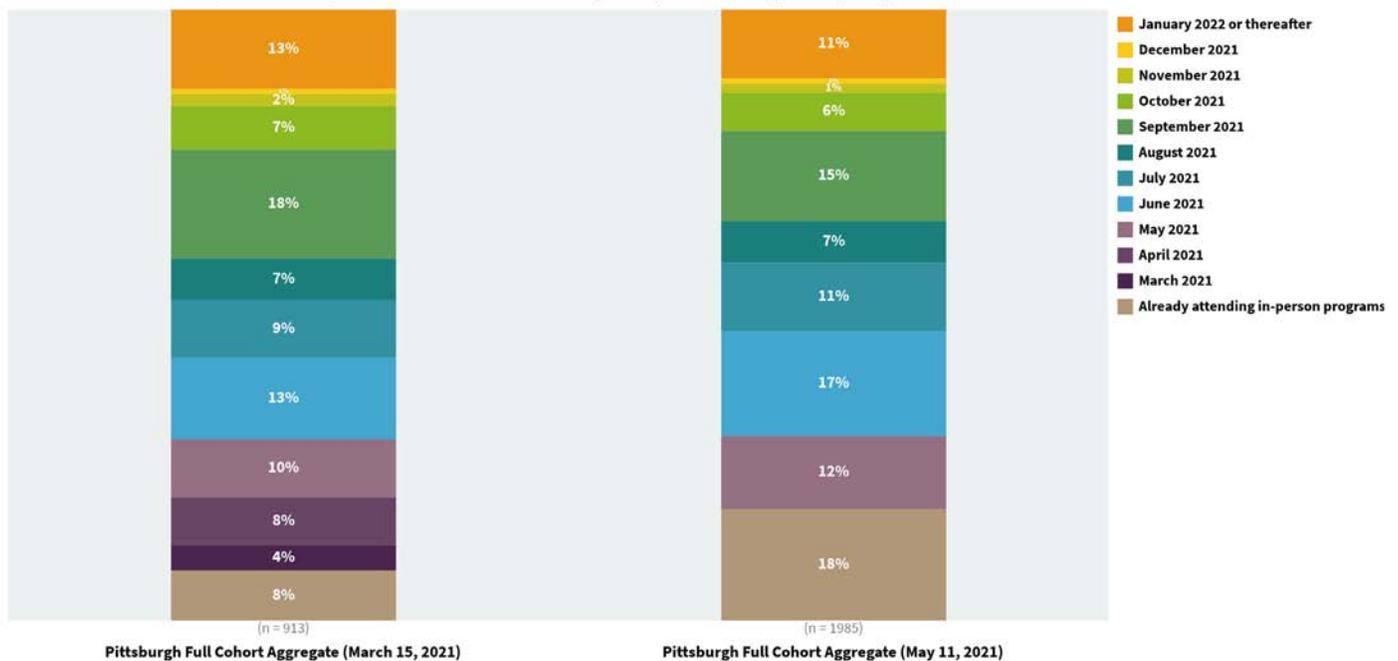


Figure 10. *Performing Arts*

AUDIENCE ATTITUDES TOWARDS HEALTH SAFETY POLICIES

As previously stated, audiences and visitors have a wide range of comfort levels returning to events. To understand how to best serve audiences and visitors as organizations re-open, the survey asks a series of questions about which health safety policies will help audiences to feel comfortable returning and which may feel like too much of a burden.

In March and May, the survey asked both museum and performing arts respondents which health-related topics are most important to them. **Figures 11 and 12** indicate that for both museum visitors and performing arts attendees, mask requirements, distancing, and good ventilation are most important, although we do observe some variations between the two types of organizations.

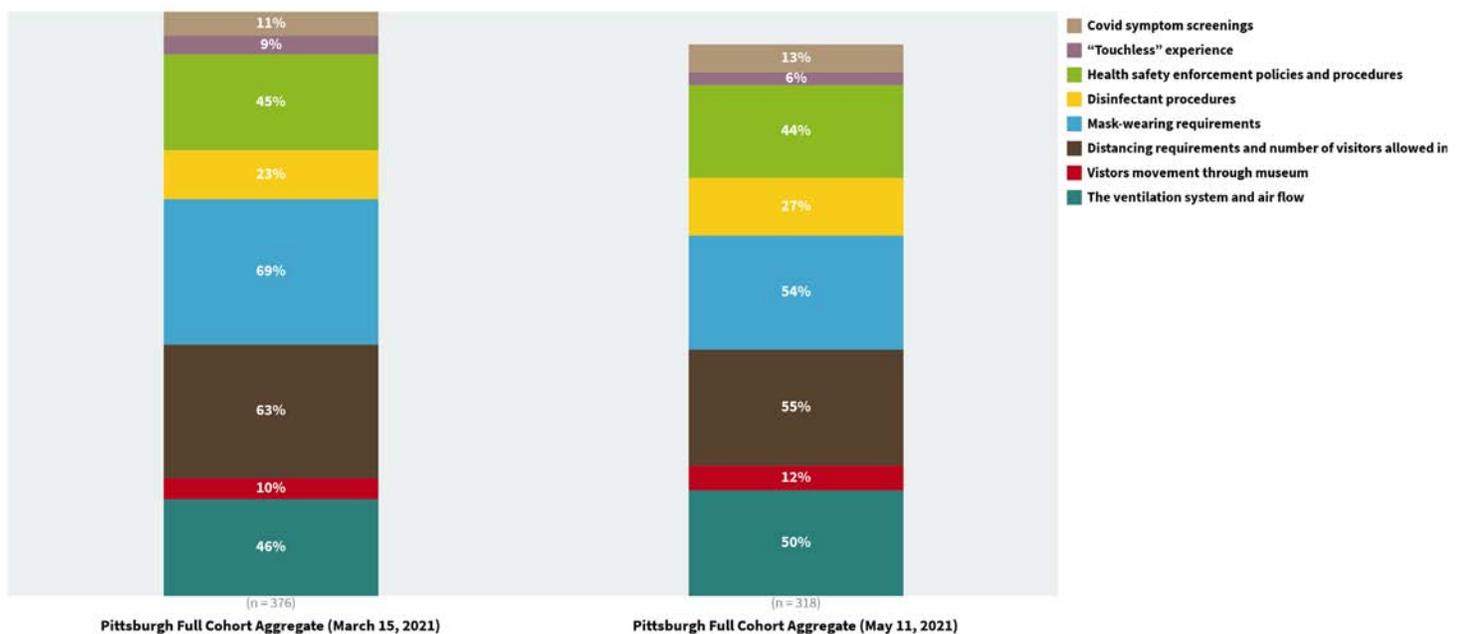


Figure 11. Museums

In light of changes to the CDC guidance and other changes in local health safety guidelines that occurred in May, new questions were added to the survey probing which health safety policies are prerequisites or deal breakers for audiences. While we do not yet have data from Pittsburgh audiences on these questions, the next section draws on results from the Detroit Metro region to offer an early indication of attitudes towards a variety of policies.

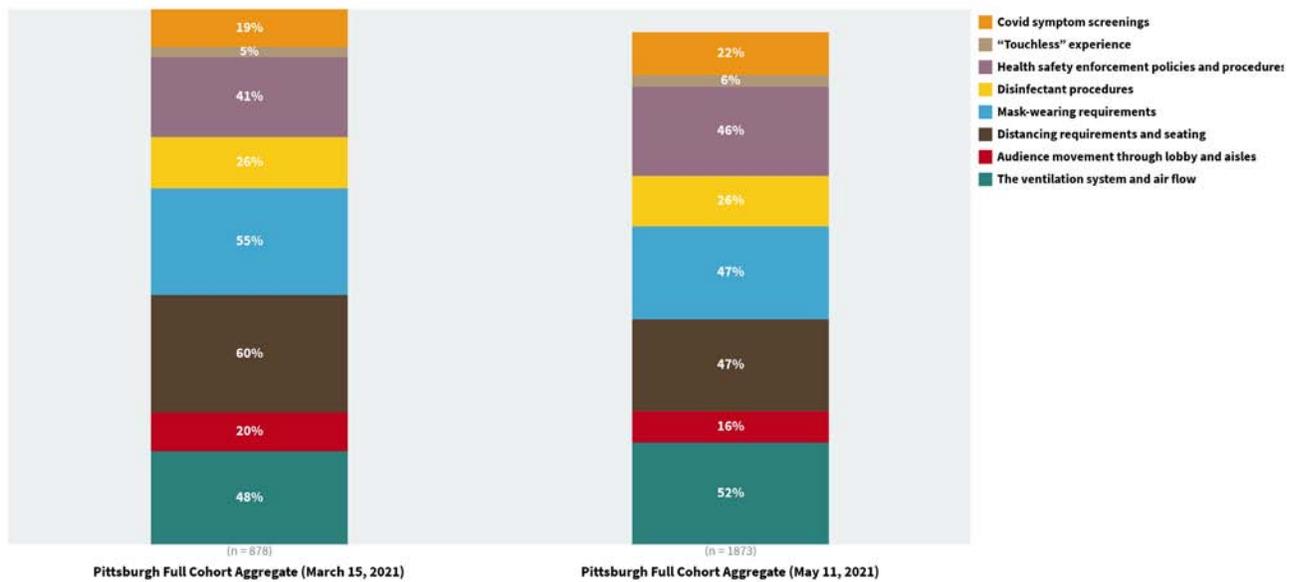


Figure 12. *Performing Arts*

Figures 13 and 14 demonstrate how respondents' attitudes can conflict to an extent that makes it impossible to satisfy everyone. While 38% of respondents report that mask requirements are a prerequisite for their attendance, for example, another 13% report that they are a deal breaker. Similarly, 24% of respondents indicate that proof of vaccination or a negative COVID-19 test is a prerequisite to attendance, while 15% report that this is a deal breaker.

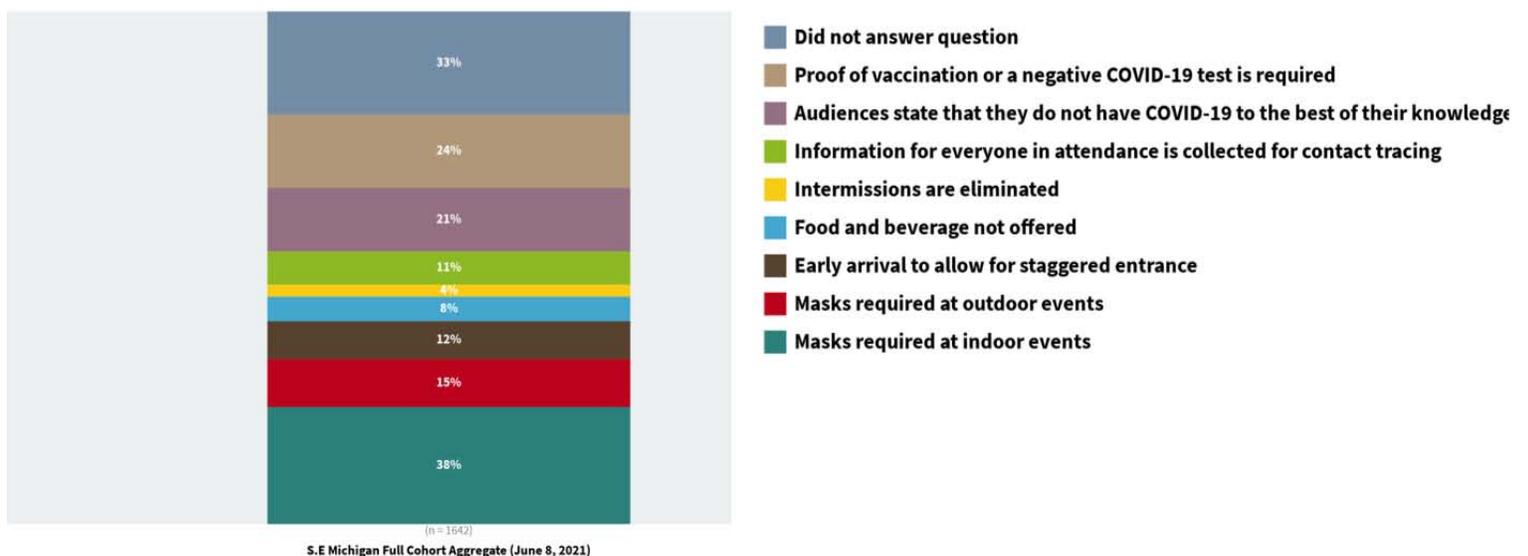


Figure 13. *Performing Arts: Which of the following policies are prerequisites for you to attend an in-person event this week?*

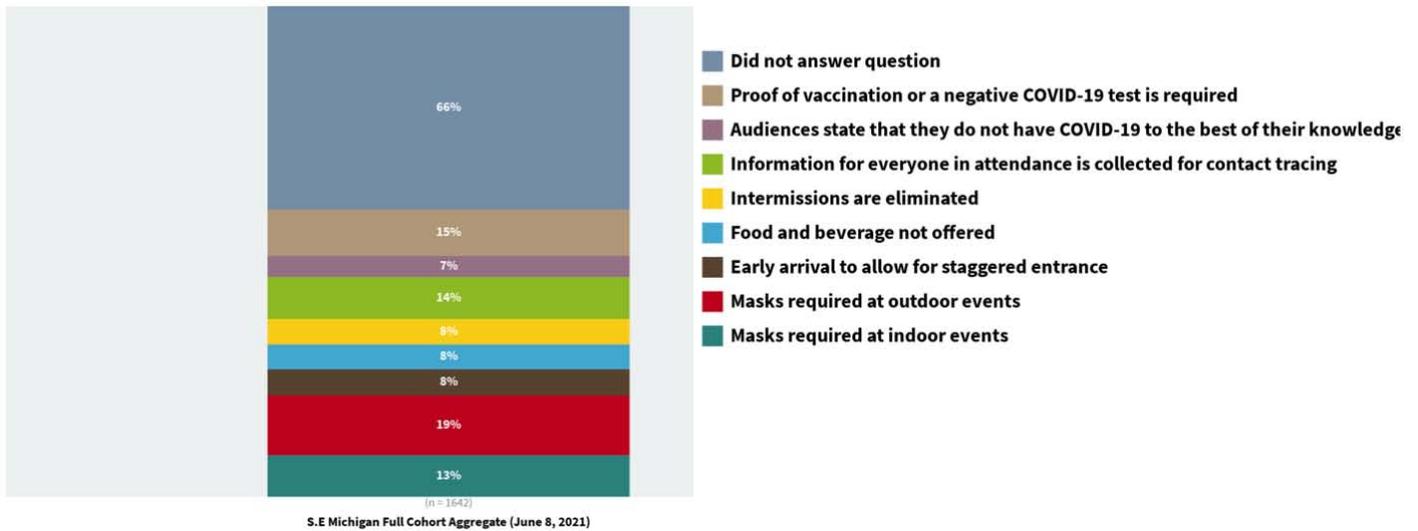


Figure 14. *Performing Arts: Which of the following policies are deal breakers, prohibiting you from attending an in-person event this week?*

Diving deeper into attitudes about vaccinated-only admittance policies among respondents to surveys sent by performing arts organizations, **Figure 15** shows that most respondents would be more likely to attend or would only attend with a vaccinated-only admittance policy. As might be expected, respondents who are parents or caregivers to children are over twice as likely to report that they'd not attend with this policy (16% compared to 7% for non-caregivers).

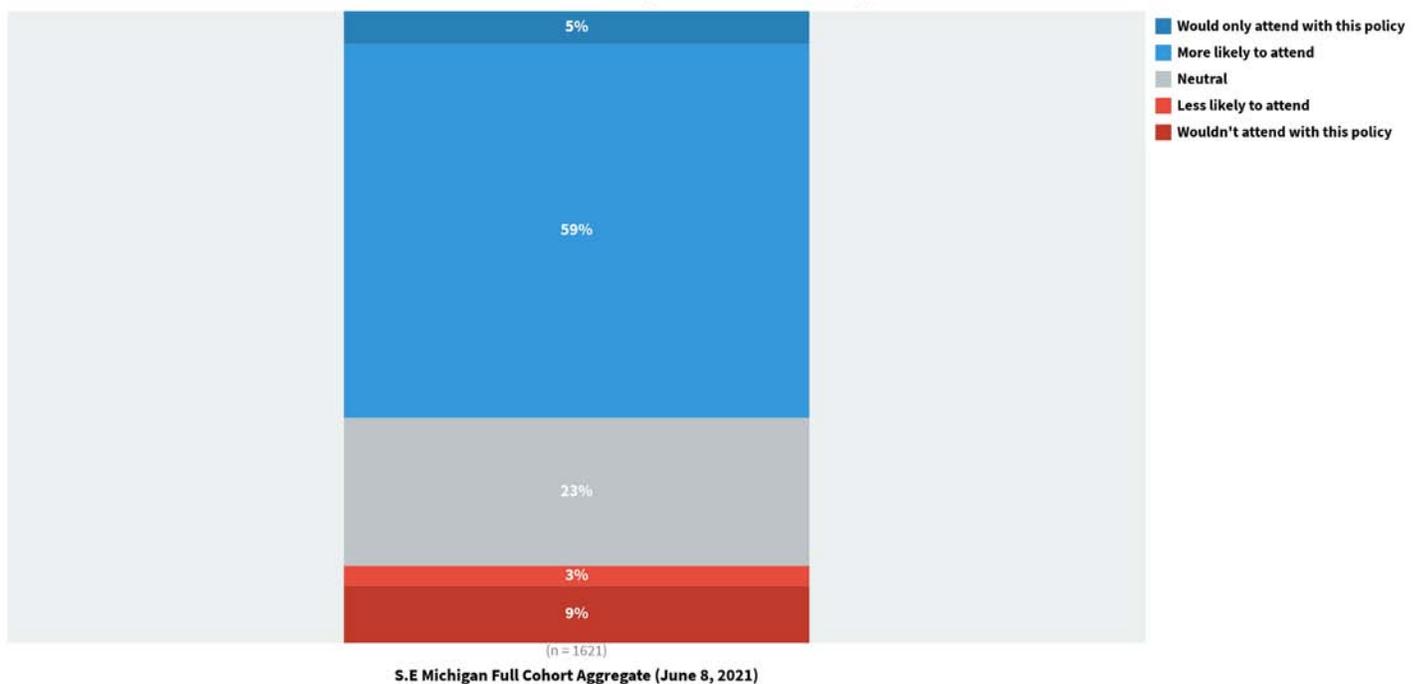


Figure 15. *Performing Arts: In some states arts and cultural organizations are allowed to welcome back larger audiences if everyone in the audience shows proof of vaccination. How would a vaccinated-only admittance policy impact your feelings about attending in-person events?*

The open-ended follow-ups to this question indicate how strongly many respondents feel about this topic. Respondents who would not attend with a vaccinated-only admittance policy cite violations of privacy, encroachments on freedom, vaccine hesitancy, and a belief that concern about the pandemic is too high. The responses below illustrate just a few of these sentiments.

Respondents who would only attend with a vaccinated-only admittance policy cite concerns about safety and lack of trust in other audience members. The responses below illustrate these sentiments. The sentiments on both sides demonstrate how strongly many respondents feel about this topic and how difficult it is for arts organizations to navigate decisions about which policies to implement when no policy will please everyone.

"I still believe in an individual's right to consent regarding an experimental medical treatment. Any organization that implements a vaccinated-only policy is expressing sentiments to the contrary, and that organization would lose my patronage well beyond the 'end' of this pandemic."

"This is a violation of privacy. Useless. Let us be free. Those that are still scared have a right to stay home."

"I have COVID antibodies and my doctor has told me not to get vaccinated at this time."

"In my opinion, a vaccination-only policy is the surest way to eliminate the spread of COVID, and has the added benefit of eliminating the need for masks and social distancing."

"Because there are COVID variants and anti-vax'ers can deal with their own consequences of choosing to not vax. I got the vax because I chose to be safer and to protect the people in my family who have autoimmune diseases. Too much selfishness out there."

"Vaccination rates are too low and too many people are openly opposed to being vaccinated. I don't feel safe attending any large event with a random sample of the general public."

A selection of open-ended responses from survey participants

ENGAGEMENT WITH DIGITAL PROGRAMMING

One of the few bright spots to come out of the COVID-19 pandemic for the arts and cultural sector has been the explosion of digital arts and cultural programs, and the survey has tracked engagement with digital programming over time. As of May, 38% of Pittsburgh-area survey respondents report having watched online cultural programs in the last two weeks, with nearly half saying they paid. **Figure 16** illustrates that the rate of watching digital programming has declined slightly over the past five months. However, the percentage of respondents paying for digital programming has remained constant at about one in five.

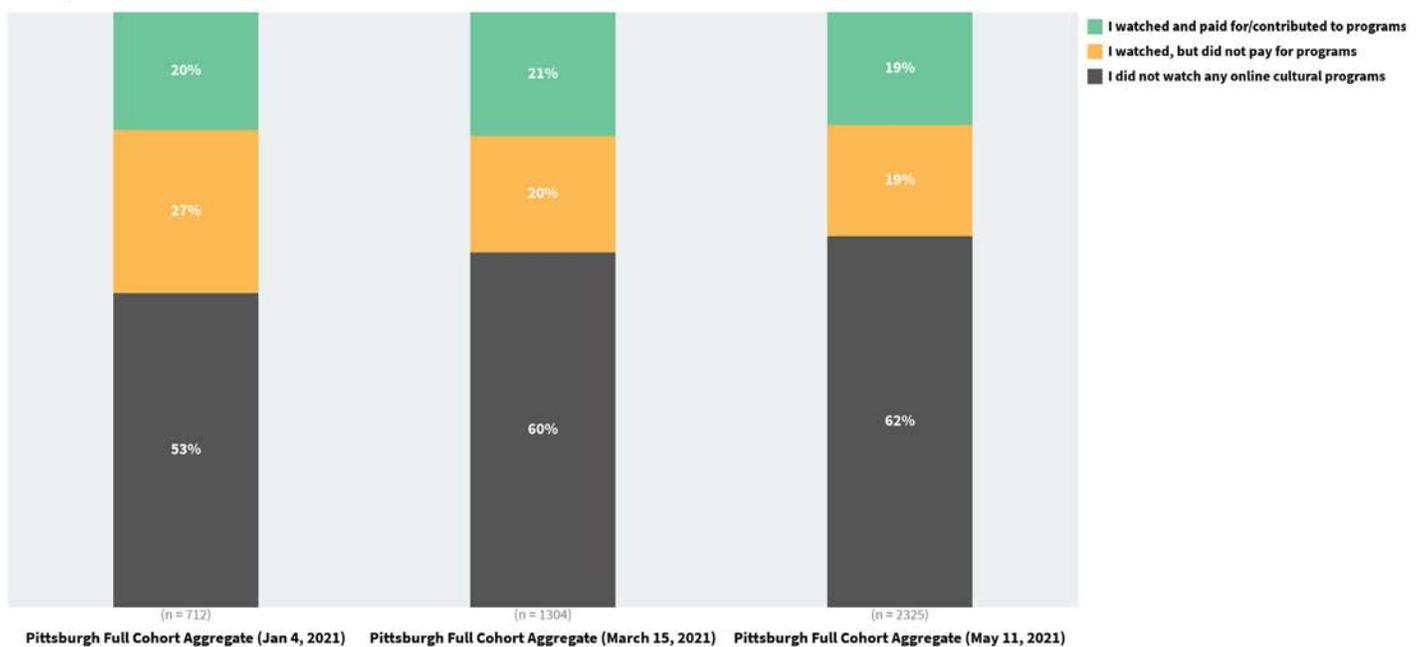


Figure 16. Please select the option that best describes your engagement with online cultural programs in the past two weeks.

When respondents who have paid for digital content were asked how they paid, the majority of respondents (71%) reported that they paid a one-time fee. Making voluntary donations (47%) was also a common payment method.

Digital programs have provided a lifeline to audiences and visitors who are not yet comfortable attending cultural events in-person. In fact, the survey finds that respondents reporting higher levels of caution and concern are using digital programming more heavily. In May, audiences who reported that they would not attend an indoor cultural program this week reported higher levels of watching and paying for digital programs. Respondents who reported that a member of their household is vulnerable to a serious health outcome from contracting COVID-19 have also consistently reported higher rates of using and paying for digital programs (**Figure 17**).

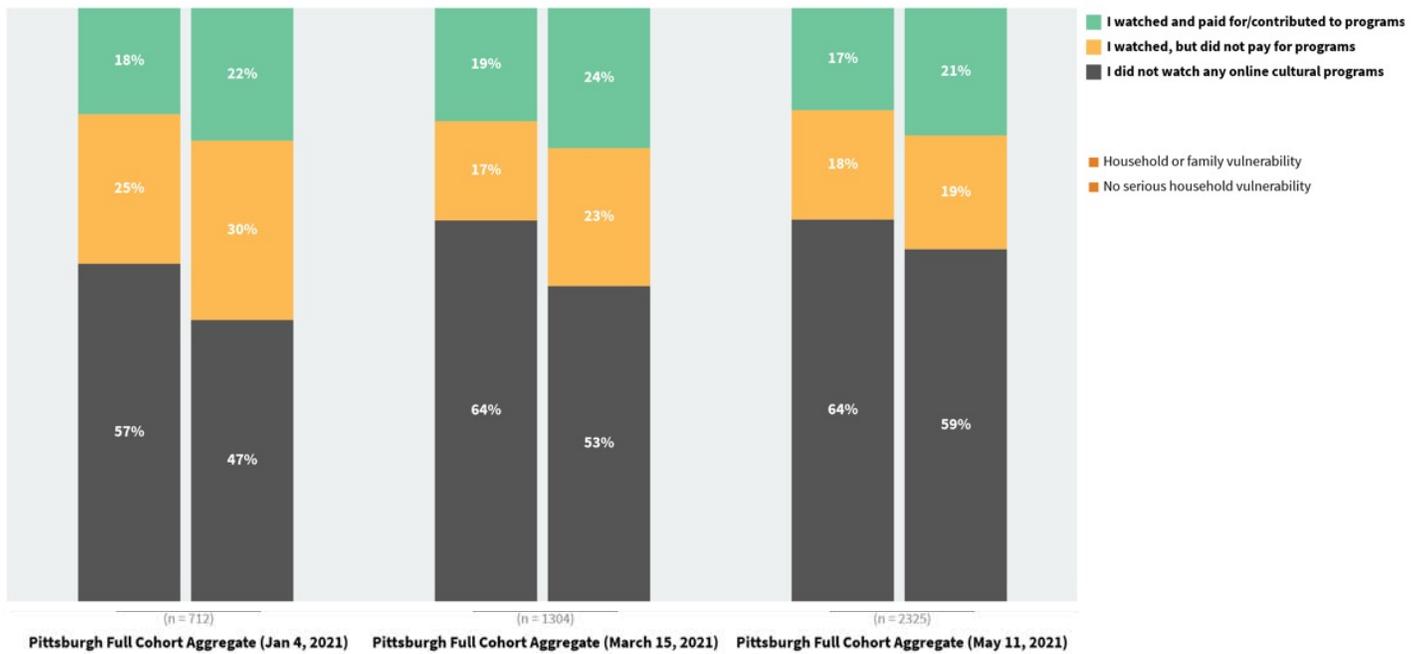


Figure 17. Please select the option that best describes your engagement with online cultural programs in the past two weeks.

In response to questions about the role they think digital programs will play in their cultural consumption after the pandemic, over half of respondents reported that online programs will play a small or substantial role even after they return in person (**Figure 18**).

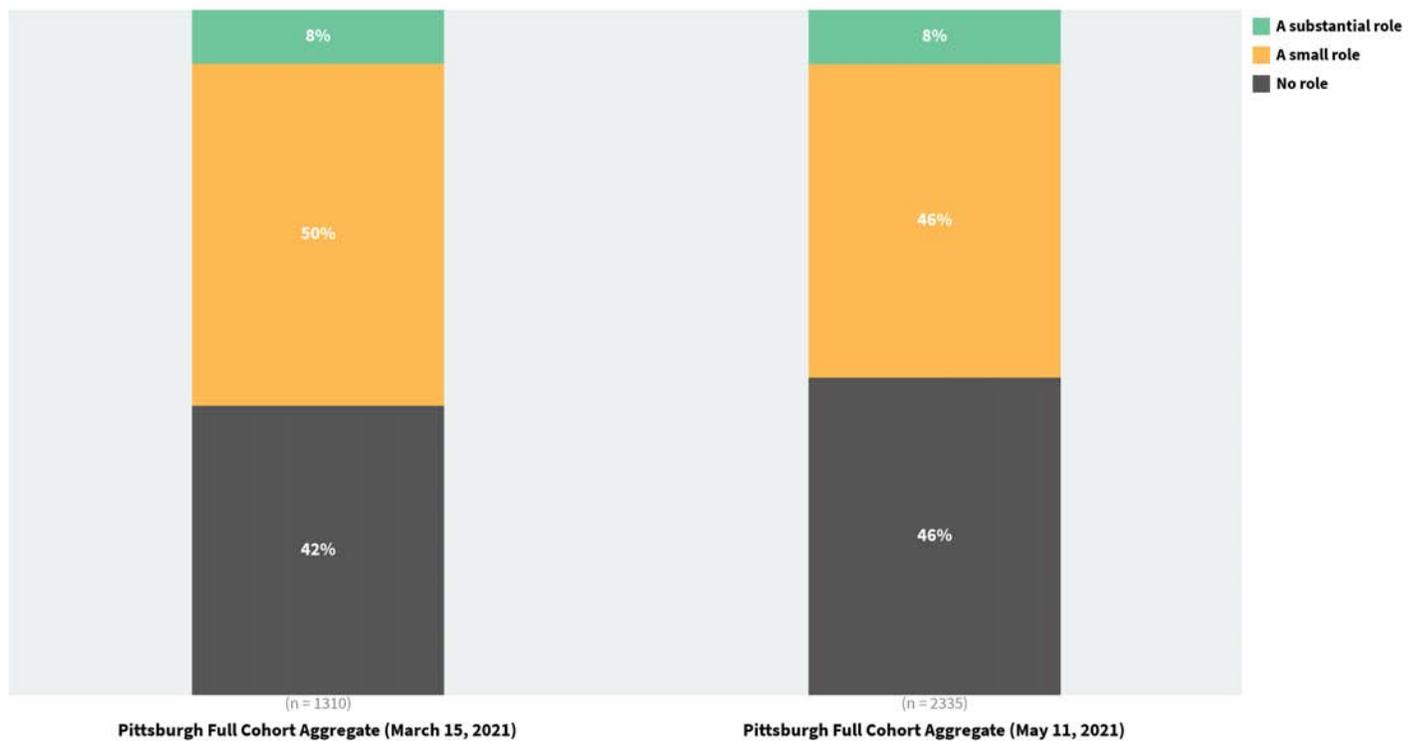


Figure 18. Once facilities reopen and it's possible to attend in-person as often as you'd like, what role will online programs play in your cultural life?

The follow-up comments from respondents who feel digital programs will play a continued role shed light on the long-term value proposition arts-goers see for digital. Respondents shared how digital programming has allowed them to see programs from outside of their region, watch programming more often, and explore new content. Families also shared that it makes attending easier and more economical and that online content provides educational opportunities for their children. Here are just a few examples of how respondents articulated the value proposition of digital programming.

"I prefer in-person performances, but like the opportunity to see online performances that I wouldn't have the opportunity to see otherwise. Examples are Met Opera, Globe Theater, and Andrew Lloyd Webber's online musicals during quarantine."

"I liked offerings in other parts of the world or country that were online (exhibit tours, discussions) that I wouldn't normally be able to participate in otherwise. I also liked that I was able to do something in the evening without needing a babysitter and will likely continue to participate in programs that allow for that."

"I find the online presentations a great way to learn about a subject or to see/hear an interview without having to drive to the venue. This has saved me time in my day/evening, and I feel the quality of presentations has improved significantly through practice on Zoom."

"Activities and enrichment for my daughter, for example zoo cameras and educational streams."

A selection of open-ended responses from survey participants

PREFERENCES FOR DIGITAL PROGRAMMING

In October of 2020 the survey delved deeply into preferences for digital content across art forms. For theatre and music, respondents expressed preferences for formats that closely reflect the live experience, such as live streams of performances or recordings of concerts available on-demand. However, for the visual arts educational content was preferred over content that most closely mimics the in-person museum experience.

With digital programming comes the opportunity to watch programs from outside your local community and around the world. The October 2020 survey asked respondents if they have a preference for digital content from their local organizations over content from organizations in different cities. The majority of respondents across disciplines indicated that they don't have any preference for local vs. non-local.

There was the strongest preference for local content for theatre where one in four respondents preferred local content and the strongest preferences for content from other cities for museums where one in four respondents indicated that they prefer content from organizations in other cities.

Despite the rapid increase in digital offerings, the landscape for digital arts and cultural programming is still taking shape. Many respondents seem to still be learning what kinds of content are available and what interests them. The relatively high levels of engagement with digital content and the positive views about its long-term role indicate an opportunity for digital to play a continued role in the arts and cultural landscape helping to introduce a wider pool of audiences and visitors to the full range of artistic work, and playing an important role in both audience development and accessibility.

There are a number of strategies for the role of digital programming long term. These include:

- Digital content as a means of expanding the audience for core programs outside of your market area
- Digital content as a means of increasing accessibility for audiences who experience challenges to attending in-person
- Digital content as a means of deepening audience engagement in live programs
- Digital content as a means of building customer loyalty and retention
- Digital content as a means of audience development and expanding aesthetic boundaries



ADDITIONAL RESOURCES

GPAC Study Updates

After each round of surveying a short update on results was prepared. You can find these updates at www.audienceoutlookmonitor.com/greater-pittsburgh-arts-council.

Executive Briefings and Deep Dives

Each month Alan Brown, principal at WolfBrown, presents two webinars. One is a 30-minute Executive Briefing that provides a summary of current results nationally. The second is a deep dive webinar where Alan is in conversation with guest speakers about topics from strategic communication to digital engagement. You can watch recordings of all our webinars here: www.audienceoutlookmonitor.com/videos.

Qualitative Tools

WolfBrown has prepared focus group tool kits and interview protocols to support arts and cultural organizations in doing their own qualitative research. You can learn about and access these tools here: www.audienceoutlookmonitor.com/tools-for-qualitative-research.

About the Greater Pittsburgh Arts Council

The Greater Pittsburgh Arts Council champions the arts in Southwestern Pennsylvania, providing financial, professional, and political support for the arts and culture sector. Comprised of more than 600 diverse artists and nonprofit organizations, the Arts Council offers valuable research, legal and business consulting, networking, and professional development opportunities so that artists, arts leaders, and organizations can grow their skills and advance their practice. The Arts Council provides grants for artists and arts organizations. We also lead the region's arts advocacy at the local, state, and national level, and model best practices for accessibility and equity in the arts. For more information, please visit PittsburghArtsCouncil.org.

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