COVID-19 IMPACT SURVEY | MAY 2020

THE PATRONS' PERSPECTIVE:

An Overview of the Impact of COVID-19 on the Behavior of Theater-goers

UNOBSTRUCTED
YOUR VIEW ON THE LIVE EVENTS INDUSTRY

PRESENTED BY:

AudienceView

THEATERMANIA

ABOUT UNOBSTRUCTED

At AudienceView, we understand what it's like to have an obstructed seat at an event. This can extend into our day-to-day lives, when you have only some information or a partial view into what's going on around you. Unobstructed was launched to resolve this issue for you when it comes to the live events industry.

We are excited to positively impact the professionals who work behind the scenes in live events to ensure that, over the long term, the show will always go on. We aim to inform, engage and educate the industry that we love.

With Unobstructed, we pay homage to live events professionals and others who work in all aspects of entertainment. We bring you subject matter experts, innovative ideas and market trends that we are in a unique position to share.

TABLE OF CONTENTS

INTRODUCTION 3
Executive Summary 3
Background & Methodology 4
Key Learnings 5

VIRTUAL EVENTS 6
Live Stream Viewing (Overall) 7
Live Stream Viewing (By Age) 8
Viewing Satisfaction (Overall) 9
Viewing Satisfaction (By Age) 10
Paid for Streaming Content Since March 13 (Overall) 11
Paid for Streaming Content Since March 13 (By Age) 12
Willingness to Pay for Streaming Content (Overall) 13
Virtual Reality 14

RETURNING TO THE THEATER 15
Safety Protocol Scenarios (Overall) 16
Venue Cleaning Procedures 17
Attendee Comfort Level 18
Incremental Procedures to Increase Public Safety 19

TICKET SALES CONSIDERATIONS 20
Willingness to Help Offset Costs of Physical Distance Seating 21
Just Browsing 22
Refund Protection 23

CONCLUSION 24
Appendix A 25
Willingness to Pay for Streaming Content (By Age) 26
Virtual Reality (By Age) 27
Safety Protocol Scenarios (By Age) 28

Executive Summary

In response to the global COVID-19 pandemic, TheaterMania (an AudienceView consumer brand) **surveyed more than 5,000 members** of their online community to understand how this health crisis is impacting their behavior and consumption of performing arts.

Generated from our survey results, this report will assist arts organizations of all sizes in their preparations for the reopening of theaters.

The report aims to uncover new behaviors of theater-goers, including opinions of incremental procedures to increase public safety, motivations and timelines to return to live events, near-term ticket buying intentions, plus pricing information in support of physical distance seating.

Insights Inside:

Results from our survey of 5,000+ members of the most avid theater-going community available online.

Safety measures and protocols that will make arts patrons more likely to visit the theater.

Near-term buying intentions, including tickets and refund protection.

Virtual events: Recent consumption and future appetite for online streaming content.

BACKGROUND & METHODOLOGY

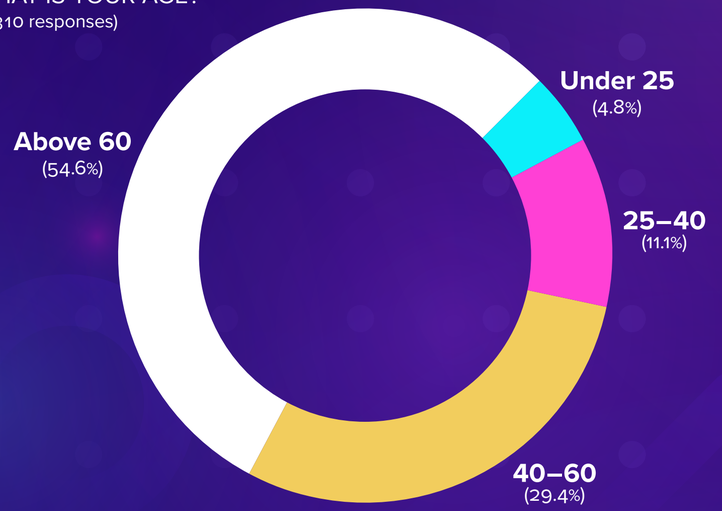
In order to better understand the patrons' perspective on returning to the theater, members of TheaterMania's community were invited to participate in a survey via email and Facebook.

This survey of 5,000+ arts patrons in the United States, which took 5–7 minutes to complete, was carried out over an 11-day period from May 12–22, 2020.

TheaterMania's audience represents the most avid theater-going demographic available online.

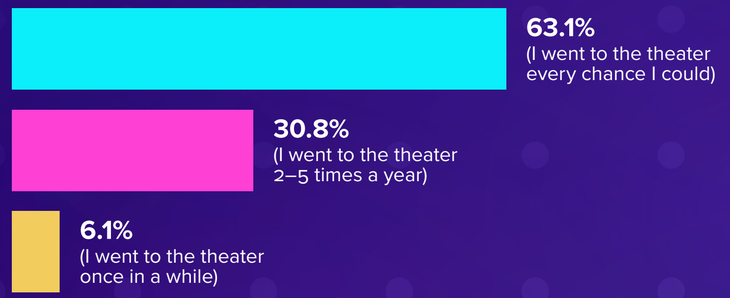
AGE BREAKDOWN

WHAT IS YOUR AGE?
(5,310 responses)



RESPONDENT PROFILE

BEFORE THE COVID-19 CRISIS, HOW AVID A THEATERGOER WERE YOU?



Key Learnings

GENERATION GAPS

- As expected, the respondent's age factors into their behavior, with the largest deviation found between the under 25 and 60+ segments.

VIRTUAL EVENTS

- People that watched live streaming content overwhelmingly enjoyed it, with less than 1% self-reporting as detractors.
- 50% of respondents would consider experiencing theater using a virtual reality device sold by a theater.

HEALTH & SAFETY PROTOCOLS

- Published information on the cleaning procedures of a theater is very important to attendees.
- Crowds and close proximity to fellow attendees make people the most uncomfortable.
- Attendee flow and low-tech solutions (mandatory masks, hand sanitizer) are the most supported protocols to increase public safety.

BUYING BEHAVIOR

- The majority of theater-goers are willing to pay more for tickets to help offset lost revenue from physical distancing (empty) seats.
- More than ⅓ of people are likely to pay for refund protection in the future, an increase from the pre-pandemic adoption rate.

VIRTUAL EVENTS

Live Stream Viewing (Overall)

HAVE YOU WATCHED ANY ONLINE STREAMING CONTENT SINCE THE COVID-19 CRISIS BEGAN (AROUND MARCH 13)?*

OUR VIEW:

The adoption of live streaming content by arts organizations, some experimenting for the first time, has pushed boundaries and removed stigmas. We are confident that streaming will live on for the large majority of arts organizations that had success during this temporary shutdown.

** Survey question asked specifically about content on platforms like YouTube and Vimeo, **NOT** on Netflix, Hulu, Prime Video, Disney+, Apple TV+ and other sites which stream films and television shows.*

Live Stream Viewing (By Age)

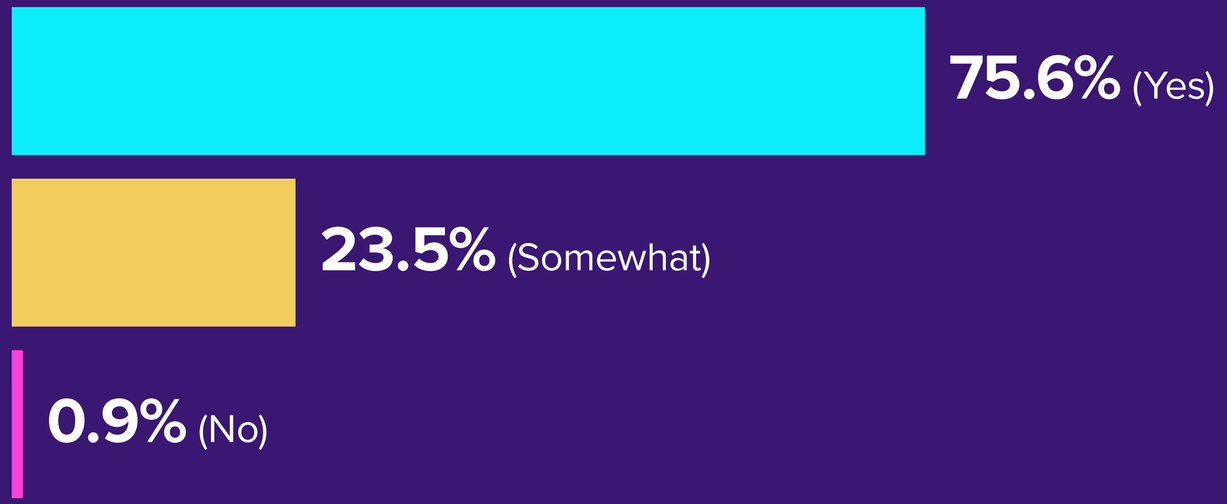
HAVE WATCHED ONLINE STREAMING CONTENT SINCE THE COVID-19 CRISIS BEGAN (AROUND MARCH 13)*

The popularity of live streaming performances on platforms such as YouTube, Facebook, Instagram and Zoom has demonstrated a continued appetite for the performing arts during this time of isolation.

** Survey question asked specifically about content on platforms like YouTube and Vimeo, **NOT** on Netflix, Hulu, Prime Video, Disney+, Apple TV+ and other sites which stream films and television shows.*

VIEWING SATISFACTION (OVERALL)

HAVE YOU ENJOYED THE ONLINE STREAMING CONTENT?



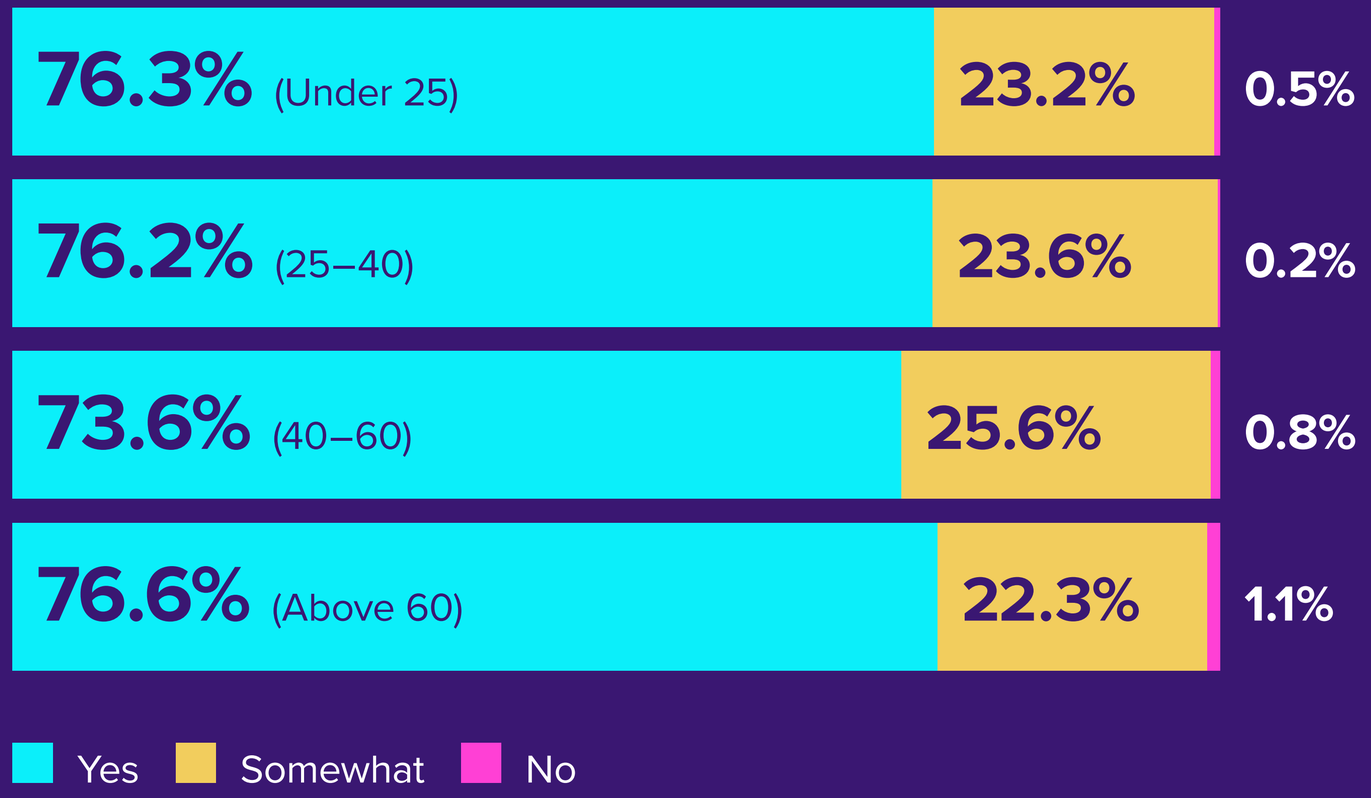
"The quality of a well-filmed production online (National Theater, Geffen in LA, on BroadwayHD) is an excellent experience."

Debra L. (Pleasant Hill, CA)

† *Results are from those respondents that indicated that they did watch online streaming content.*

VIEWING SATISFACTION (BY AGE)

HAVE YOU ENJOYED THE ONLINE STREAMING CONTENT?



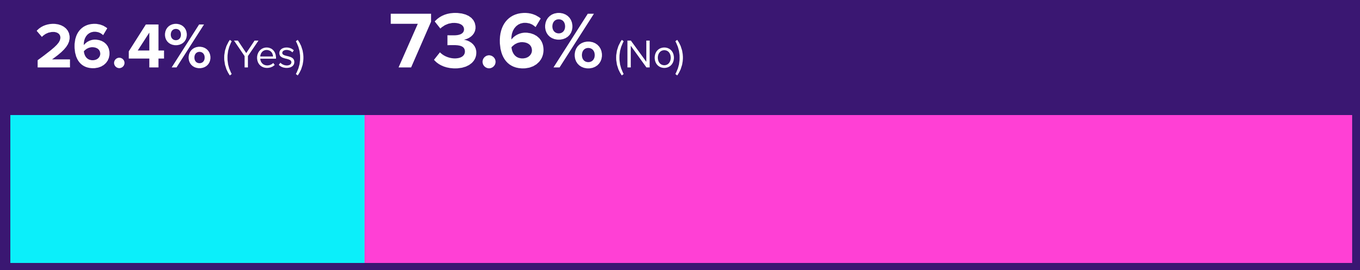
“I have been watching the Metropolitan Operas free streaming and found out that it is wonderful, just like being there, and I will continue doing this.”

Mary H. (Rochester, NY)

† Results are from those respondents that indicated that they did watch online streaming content.

PAID FOR STREAMING CONTENT SINCE MARCH 13 (OVERALL)

HAVE YOU PAID FOR ANY OF THIS ONLINE STREAMING CONTENT?



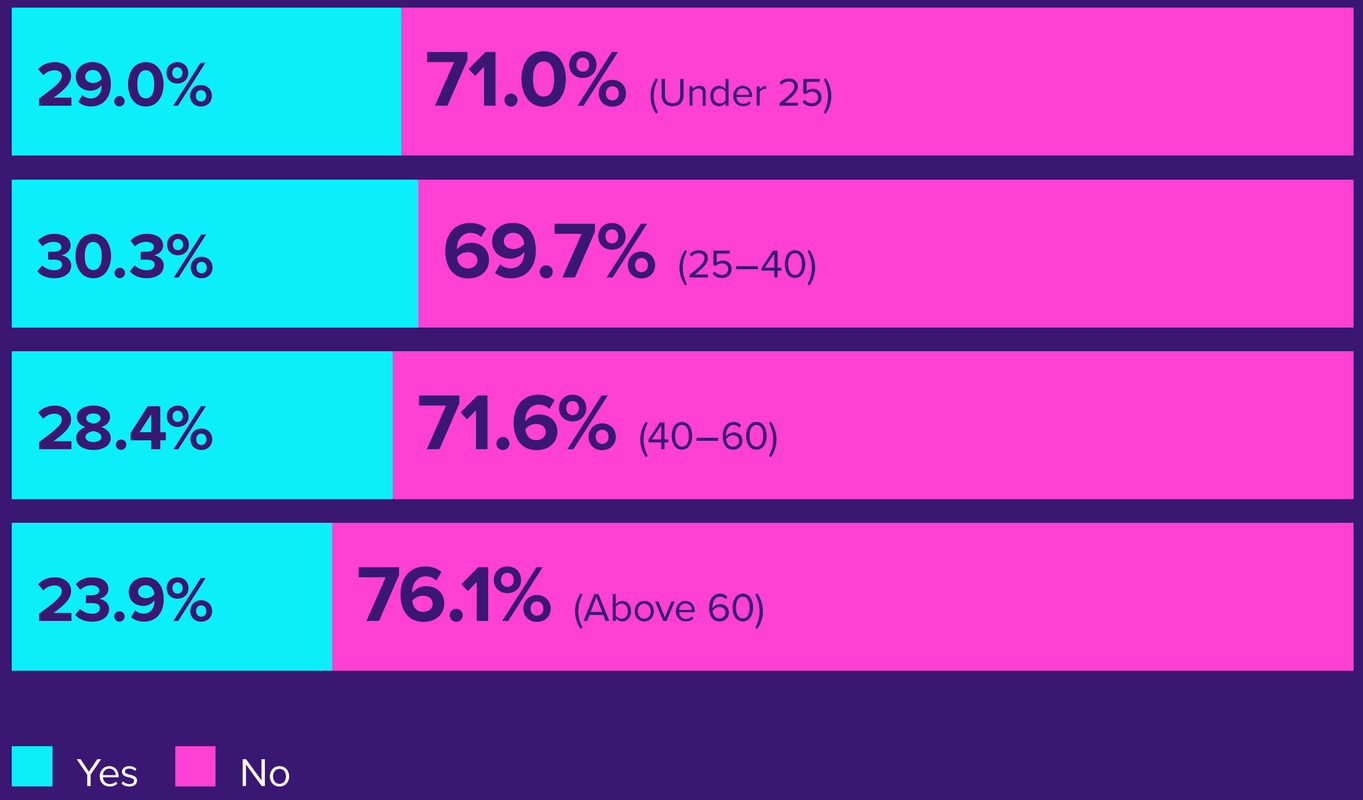
OUR VIEW:

With a swift pivot to digital, the marketplace was flooded with free live streaming content — leaving consumers with little need to pay for performances. As theaters reopen, we anticipate that the majority of live streaming content will require a paid admission (digital ticket) or unlocked via a suggested donation or pay-what-you-wish.

† Results are from those respondents that indicated that they did watch online streaming content.

PAID FOR STREAMING CONTENT SINCE MARCH 13 (BY AGE)

HAVE YOU PAID FOR ANY OF THIS ONLINE STREAMING CONTENT?



† *Results are from those respondents that indicated that they did watch online streaming content.*

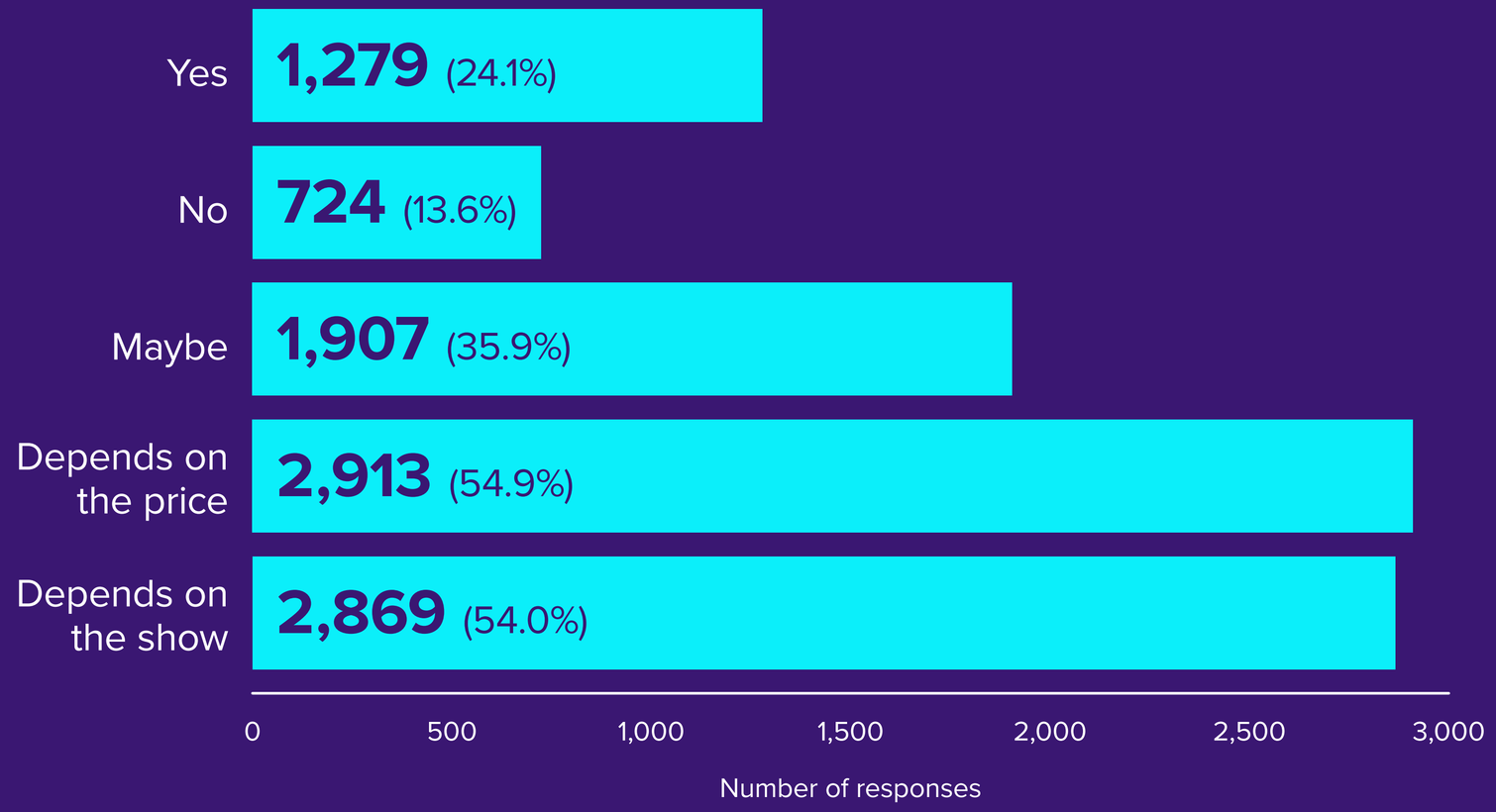
"Film productions and charge for them on streaming services until there is a vaccine that's readily available. It's the only thing that will bring back the 55 and up crowd."

Bonnie H. (New York, NY)

WILLINGNESS TO PAY FOR STREAMING CONTENT (OVERALL)

WOULD YOU CONSIDER PAYING FOR STREAMING CONTENT?

(CHECK ALL THAT APPLY)



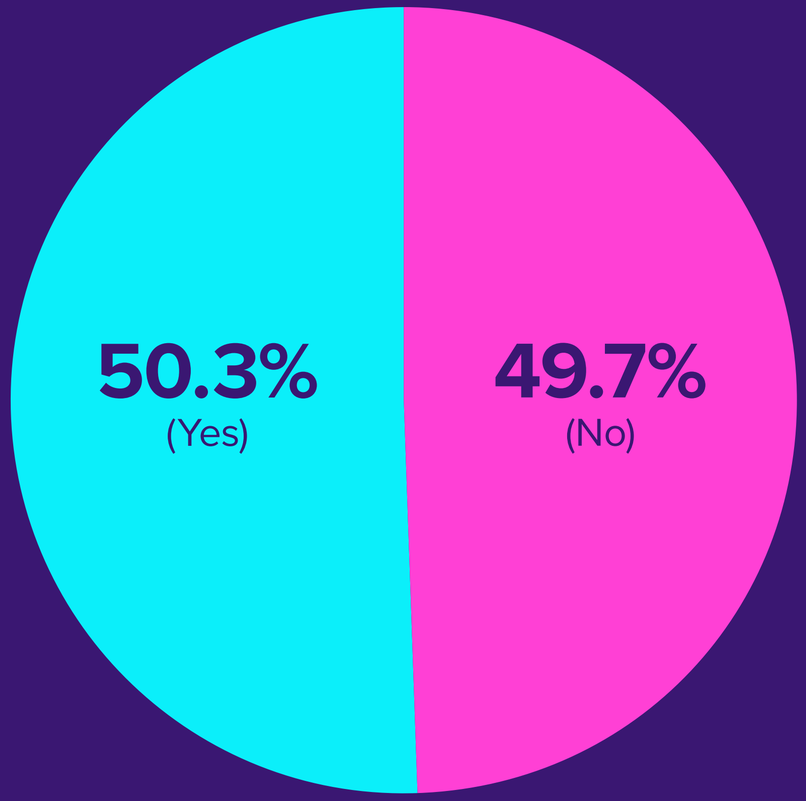
OUR VIEW:

Content and cost are big factors in the purchase decision. We recommend experimenting with content types and formats to best understand what resonates most with your audience.

‡ For a breakdown of Willingness to Pay for Streaming Content (By Age), see Appendix A.

VIRTUAL REALITY‡

WOULD YOU CONSIDER EXPERIENCING THEATER USING A VIRTUAL REALITY DEVICE THAT A THEATER MAY SELL?



"For me at least, theater is live by definition and therefore virtual reality events are something else altogether and I'm afraid I'm just not interested in those events no matter how they may be pitched or marketed. Just sayin..."

Robert C. (New York, NY)

‡ For a breakdown of Virtual Reality (By Age), see Appendix A.

Returning
to the Theater

SAFETY PROTOCOL SCENARIOS (OVERALL)

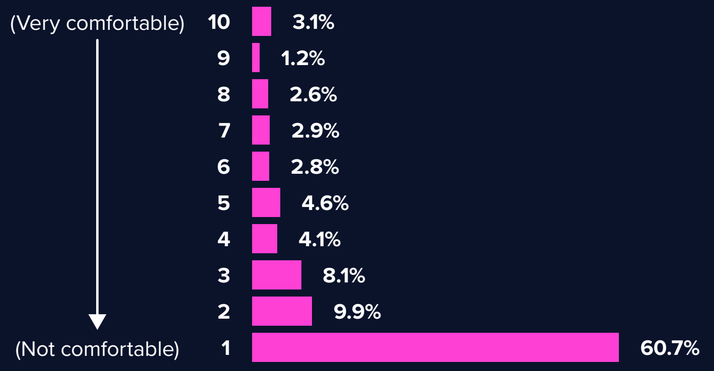
COMFORT LEVEL BY SCENARIO

“I am a lifelong Broadway fan… but I will not be comfortable until this crisis is over.”

Claire T. (Tenafly, NJ)

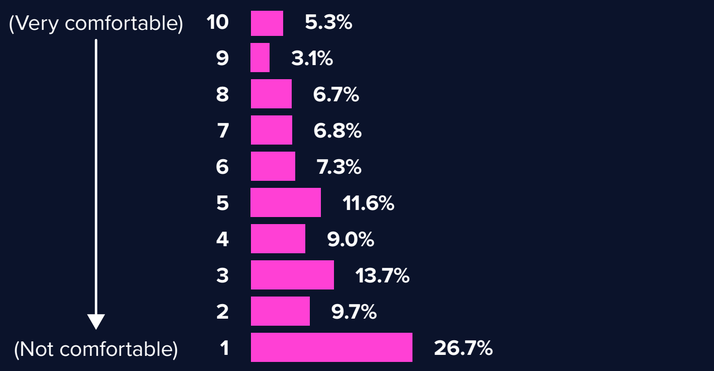
Scenario 1:

At this point, would you feel comfortable attending the theater **without social distancing measures, a vaccine or testing in place**?



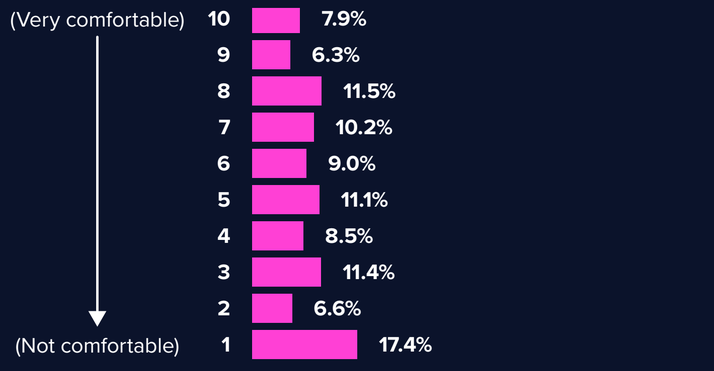
Scenario 2:

At this point, would you feel comfortable attending the theater **with social distancing measures but no vaccine or testing measures in place**?



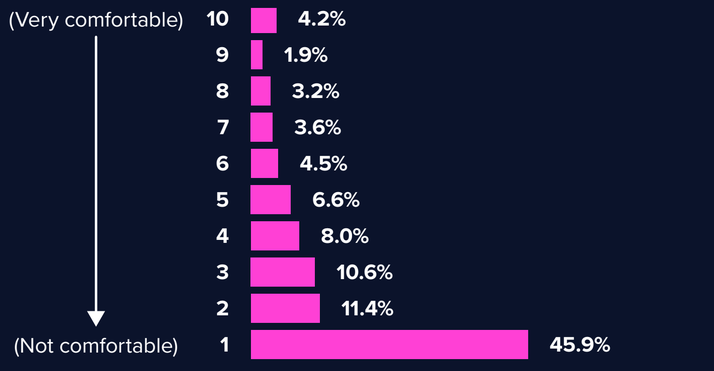
Scenario 3:

At this point, would you feel comfortable attending the theater **with testing and social distancing measures in place but no vaccine**?



Scenario 4:

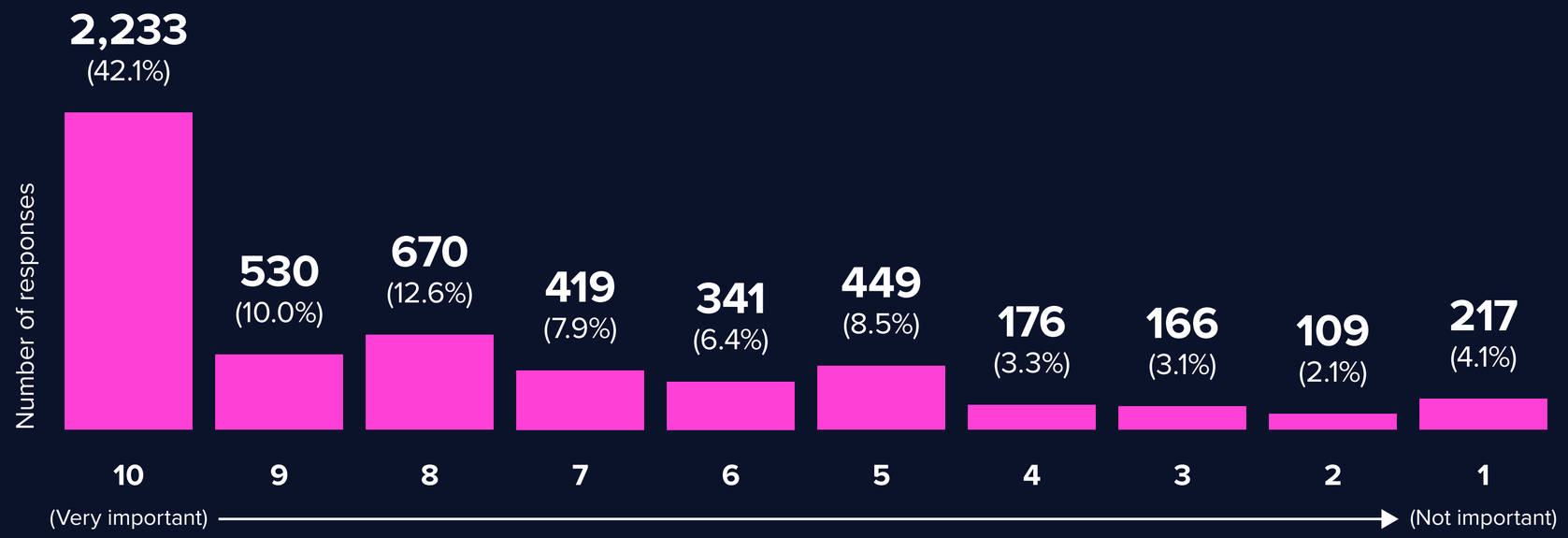
At this point, would you feel comfortable attending the theater **with testing but no social distancing measures or vaccine in place**?



‡ For a breakdown of Safety Protocol Scenarios (By Age), see Appendix A.

Venue Cleaning Procedures

HOW IMPORTANT IS IT TO YOU THAT THE THEATER YOU'RE ATTENDING PUBLISHES THEIR CLEANING PROCEDURES IN ADVANCE?



OUR VIEW:

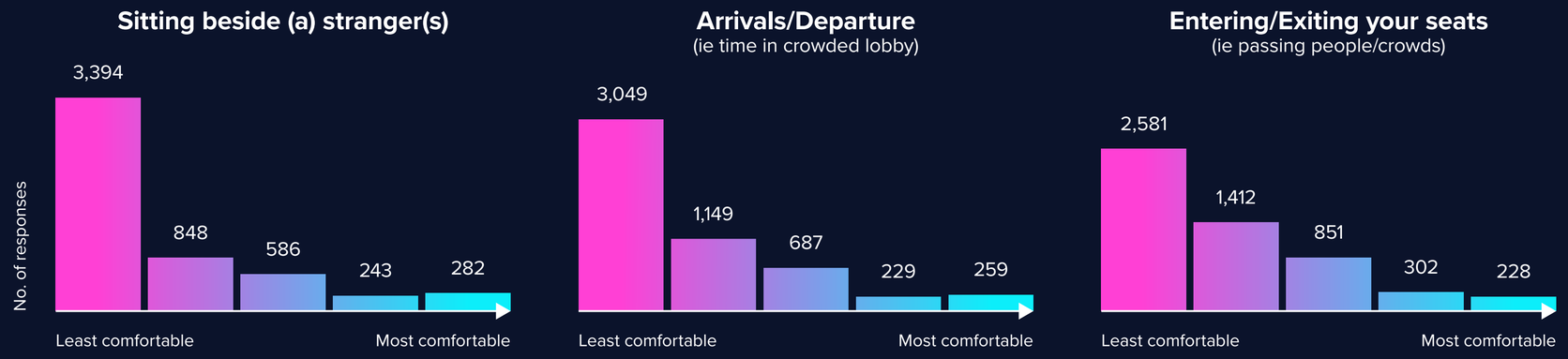
With 64.7% of respondents rating this 8 or higher, your organization should widely share your cleaning procedures on your website, social media channels and at your venue.

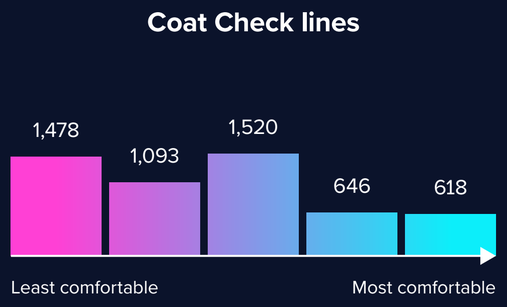
"Good communication about their processes and procedures is very important so I can make an informed decision."

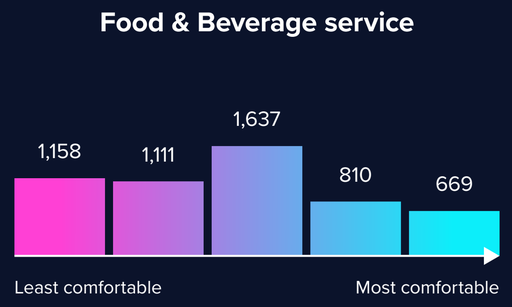
Brigid O. (Belmont, MA)

Attendee Comfort Level

WHAT ELEMENTS OF ATTENDING THE THEATER MAKE YOU THE MOST UNCOMFORTABLE?







“ I am not sure I will feel comfortable until positive cases and deaths go way down. Safety measures are great, but I don't think it's enough for me. It's too many people in a closed-in room together.”

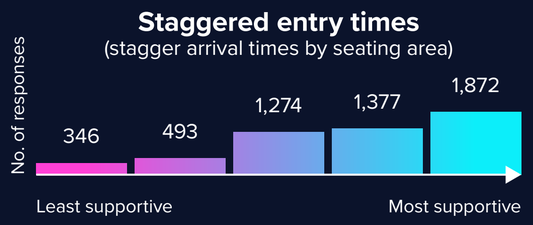
Meredith K. (North Brunswick, NJ)

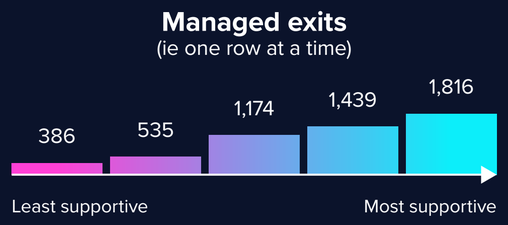
OUR VIEW:

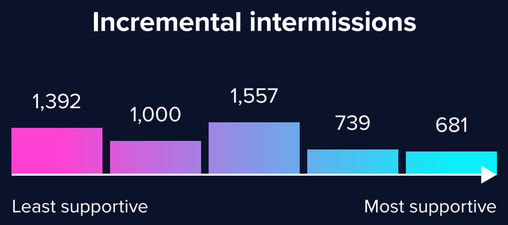
Crowds and close proximity to fellow attendees makes people the most uncomfortable. Consider building in protocols to limit queues and general bunching of attendees.

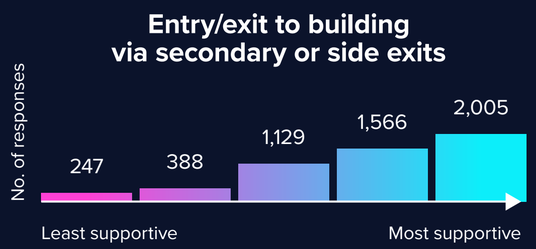
Incremental procedures to increase public safety

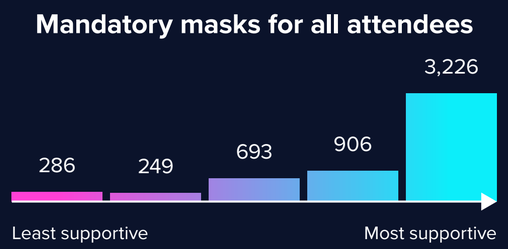
IF A VENUE ADDED INCREMENTAL PROCEDURES TO INCREASE PUBLIC SAFETY, WHICH ONES ARE YOU MOST/LEAST IN SUPPORT OF?

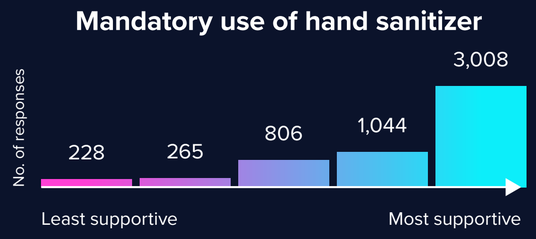


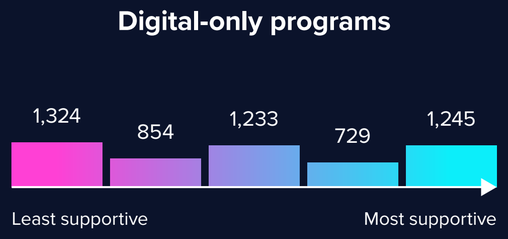


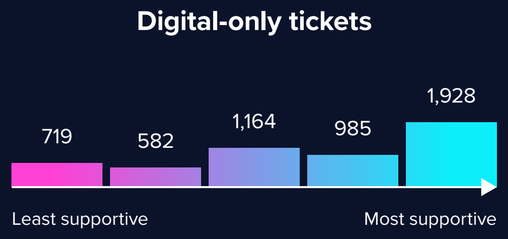












“I would not even consider going to a theater that did not mandate masks.”

Marty W. (Van Nuys, CA)

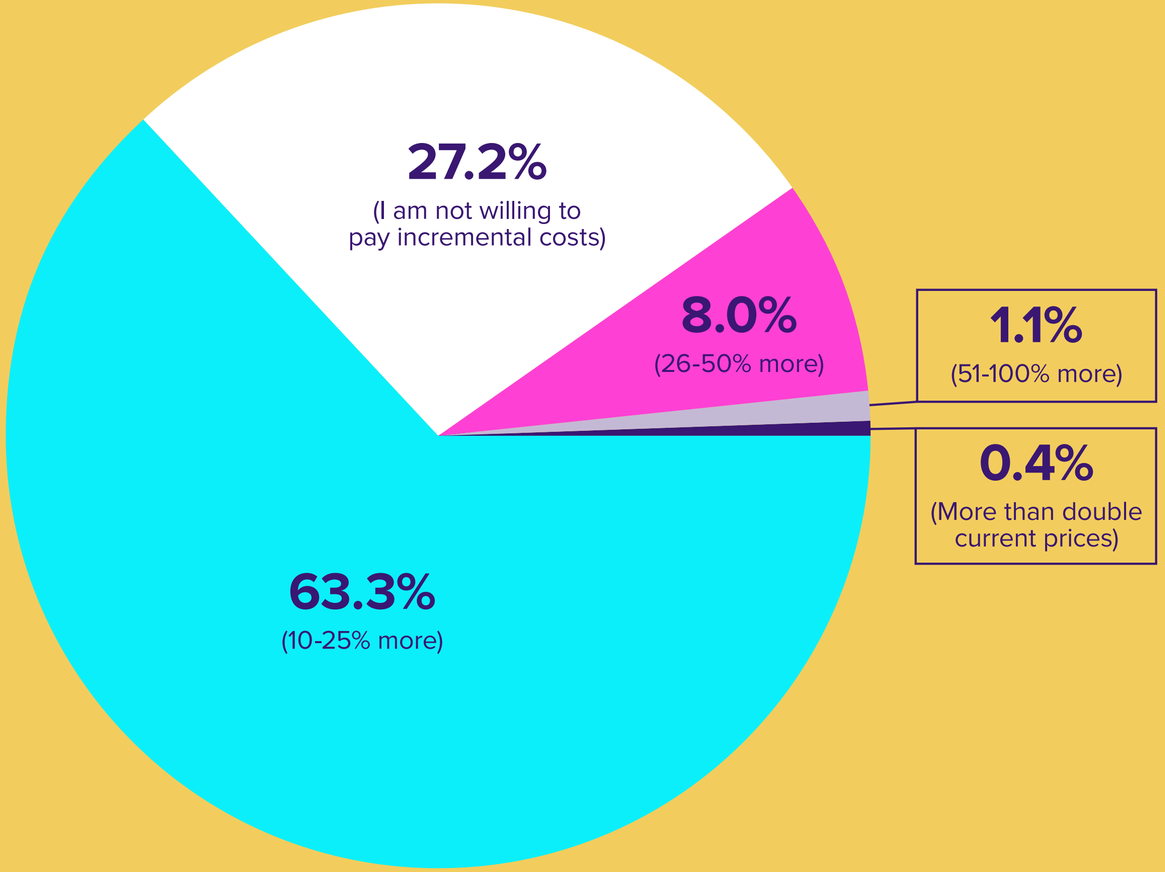
OUR VIEW:

Attendee flow and low-tech solutions (mandatory masks, hand sanitizer) are the most supported protocols to increase public safety.

TICKET SALES
CONSIDERATIONS

WILLINGNESS TO HELP OFFSET COSTS OF PHYSICAL DISTANCE SEATING

IF THEATERS HAD TO INCREASE THEIR TICKET PRICES TO OFFSET THE LOST REVENUE FROM PHYSICAL DISTANCING (EMPTY) SEATS, HOW MUCH EXTRA WOULD YOU BE WILLING TO PAY TO CONTINUE TO ATTEND SHOWS?



OUR VIEW:

Patrons are willing to pay more to offset the costs of new safety protocols. Arts organizations should consider implementing a temporary increase in ticket prices to help support the financial viability of reduced capacity due to physical distance seating.

JUST BROWSING

14.8%

Actively booking **NOW** for events in the future

OUR VIEW:

Communication and transparency—specifically around your new safety protocols and venue cleaning—are key to increasing buyer confidence, ultimately leading to advanced ticket sales and revenue.

“For me, it will just take time. I won't be there when they open and it makes me so sad...”

Karen S. (Flushing, NY)

Refund Protection

ARE YOU LIKELY TO PAY FOR REFUND PROTECTION?

36.4% YES

Our View:

Refund protection increases buyer confidence, especially when buying tickets well in advance of the event or during times of the year that inclement weather occurs more often.

CONCLUSION

AudienceView, in partnership with its consumer brands, is pleased to make the full results of this research available to the performing arts community on a complimentary basis. We look forward to hearing about how theaters use this information when developing their reopening timeline and operational plans.

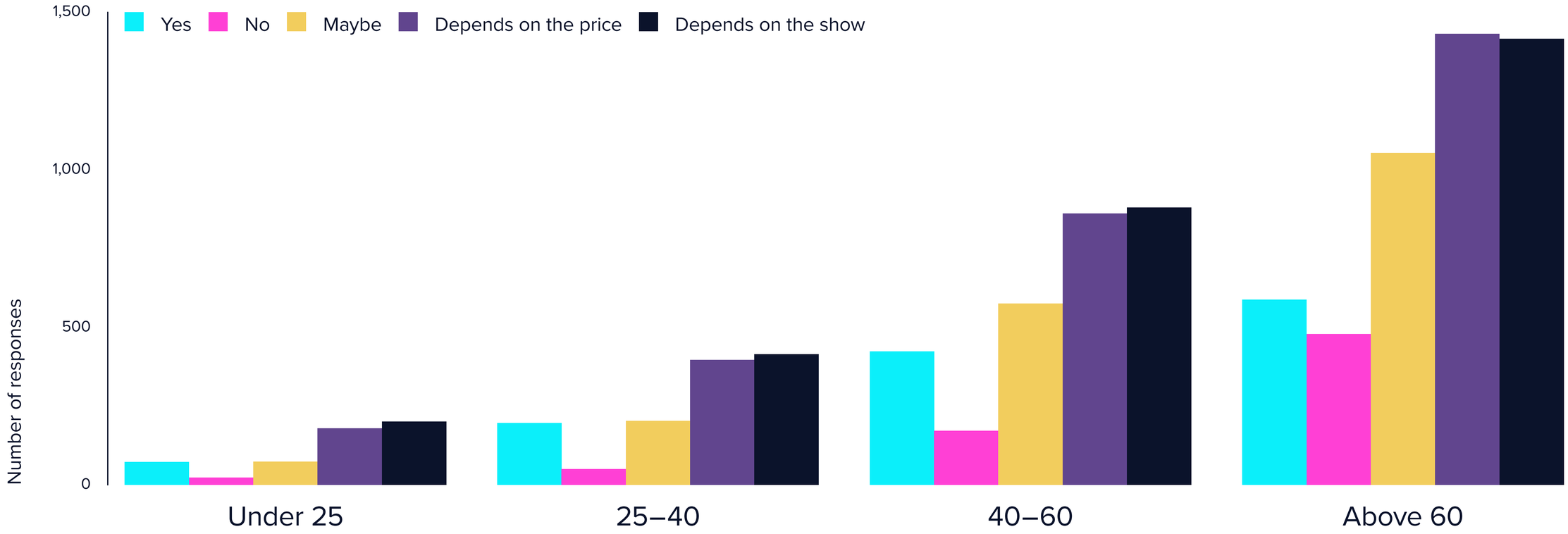
Visit AudienceView.com/Unobstructed to listen to the Unobstructed podcast

Appendix A

WILLINGNESS TO PAY FOR STREAMING CONTENT (BY AGE)

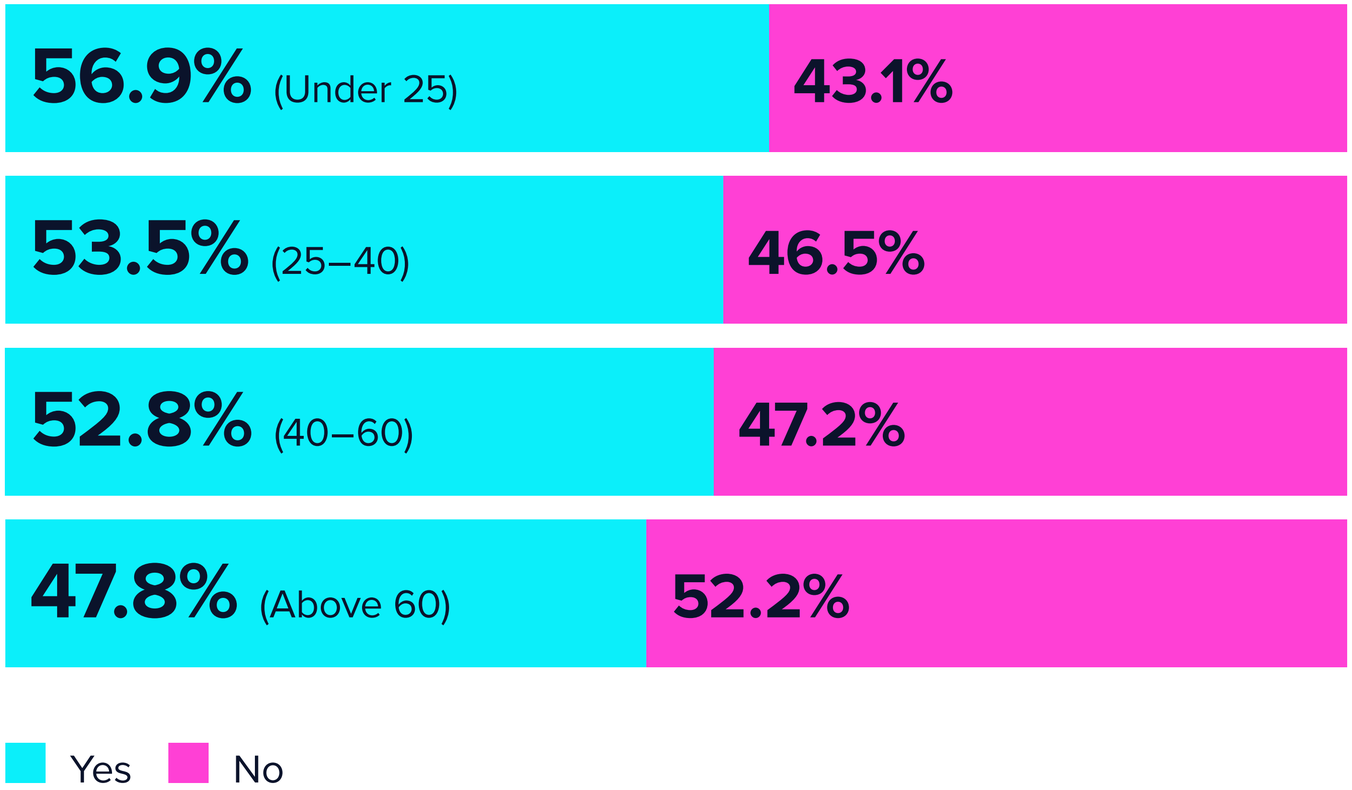
WOULD YOU CONSIDER PAYING FOR STREAMING CONTENT?

(CHECK ALL THAT APPLY)



VIRTUAL REALITY (BY AGE)

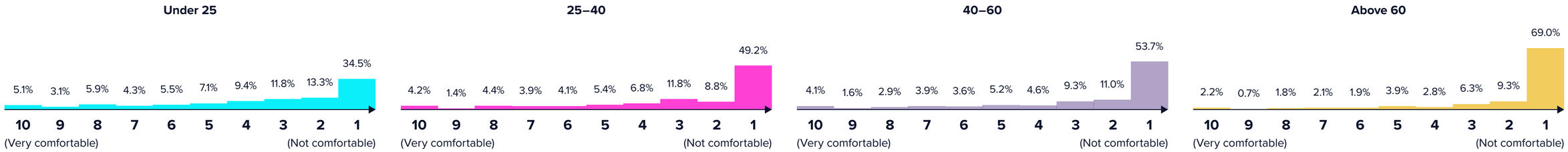
WOULD YOU CONSIDER EXPERIENCING THEATER USING A VIRTUAL REALITY DEVICE THAT A THEATER MAY SELL?



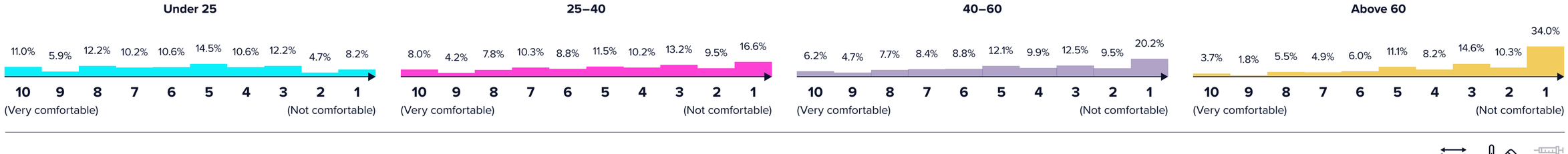
SAFETY PROTOCOL SCENARIOS (BY AGE)

COMFORT LEVEL BY SCENARIO

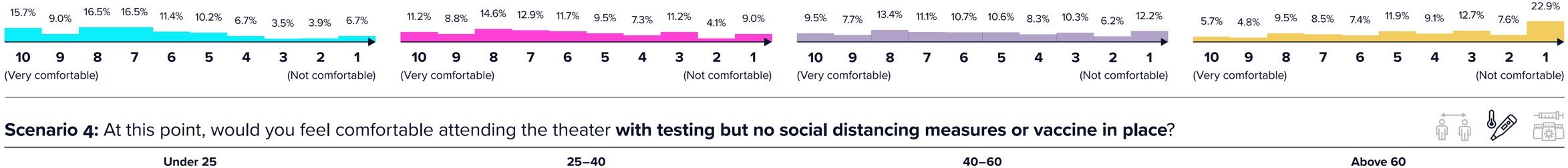
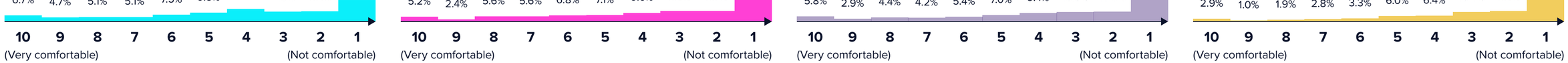
Scenario 1: At this point, would you feel comfortable attending the theater **without social distancing measures, a vaccine or testing in place**?



Scenario 2: At this point, would you feel comfortable attending the theater **with social distancing measures but no vaccine or testing measures in place**?



Scenario 3: At this point, would you feel comfortable attending the theater **with testing and social distancing measures in place but no vaccine**?



Scenario 4: At this point, would you feel comfortable attending the theater **with testing but no social distancing measures or vaccine in place**?