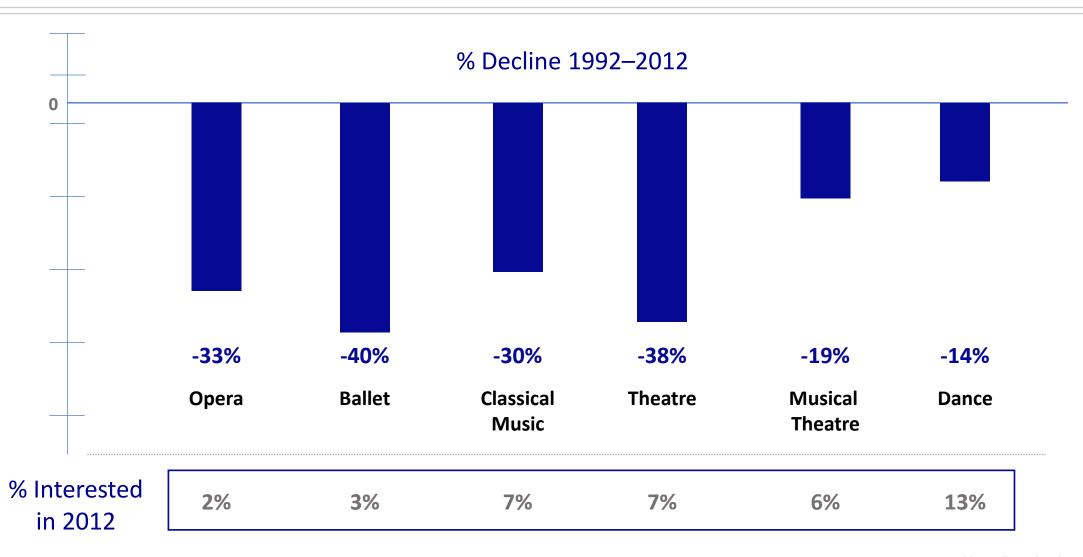
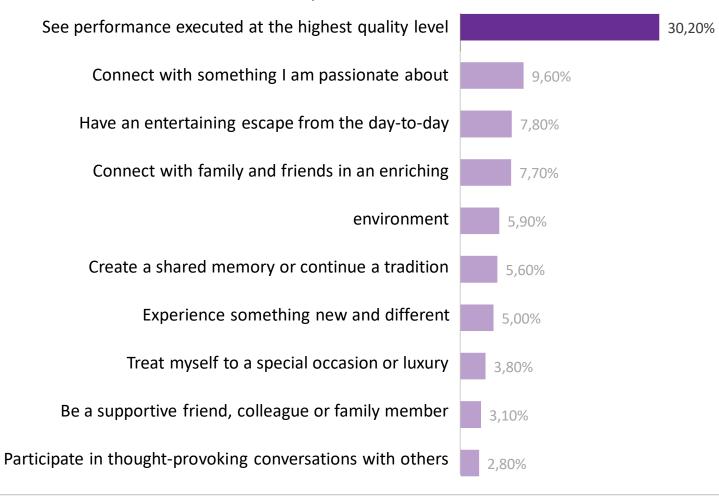
Long-term Decline in Interest in the Arts



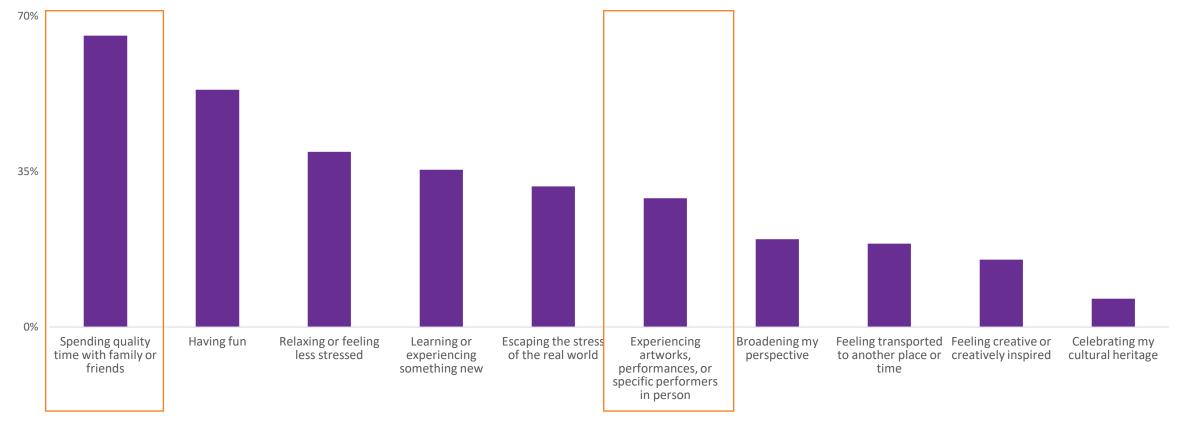
What Are Traditional Motivations to Attend?

Primary Motivation to Attend



Pandemic Reinforcing Tenuous Role of the Arts

What People Miss Most About Live Cultural Experiences During Closure



Source: Culture Track: Culture + Community in a Time of Crisis. Survey of 100,000+ Americans. Fielded May 2020.

Three Key Messages From "New Jobs" Framework

"Jobs" Expressed by Interviewees

More Frequently

Relying on Arts/Culture Organizations To Fulfill

> Little or None

Be entertained

Enjoy familiar works

Escape from the moment

Experience something new/ challenging

Treat myself to a special occasion

Indulge in a passion

Feel like things are back to normal

Separate from work

Gain mastery/expertise in an area of interest

Connect with likeminded people

Have a deeply immersive experience

Process my emotions

Be reminded of my pre-pandemic life

Help those struggling the most

Participate in thoughtprovoking conversations

Mark special occasions

Confront important social issues

Connect with others / be part of something larger

Give my kids a creative outlet (independent of me)

Structure my time / Give time meaning

Feel that I've spent quarantine well

Connect with others socially

Connect with family/friends

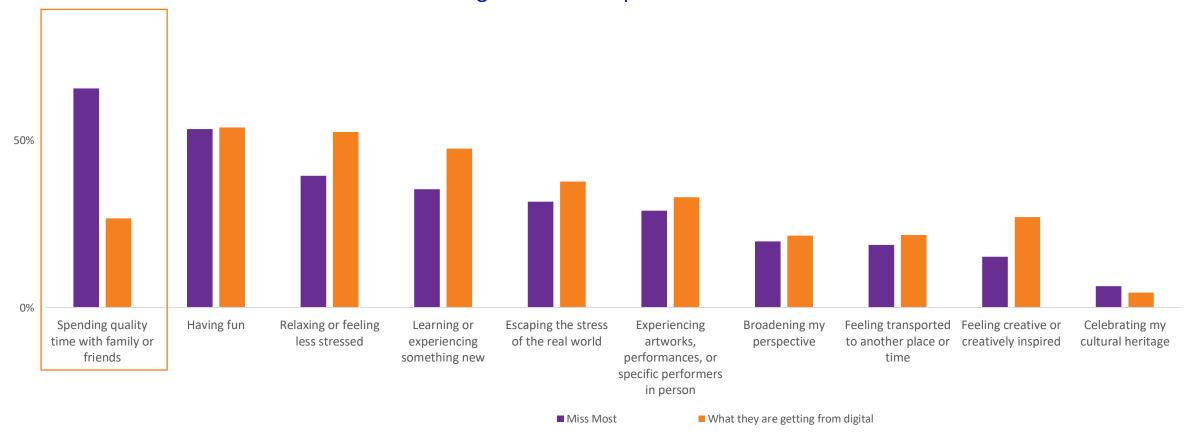
Same or Less

Urgency of Need Compared to Pre-Pandemic

Much More

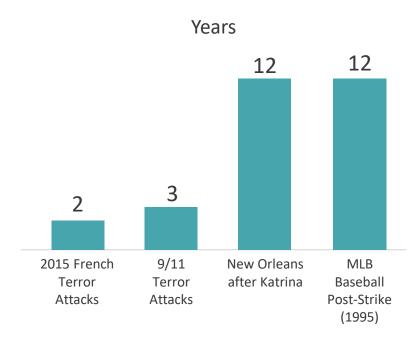
Digital Culture Offers Escape – But Not Connection

What People Miss Most About Cultural Experiences vs. What They Are Getting from Digital Culture Experiences



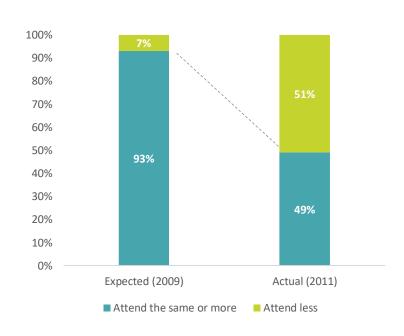
A Long Road Ahead for Return to Pre-COVID

Time to Visitor Recovery Post Incident



Source: ABA research

Post Recession Performing Arts Return



Source: Culture Track 2011

A Focused Strategy Needed on Return of Audiences

