

Majority of Arts and Culture Organizations Expect In-Person Performances to Resume by October 2021

June Study Reveals Programming, Safety Protocols, and Pricing Strategies to Welcome Audiences

TRG Arts published its findings to an initial study of 74 clients' performance return plans in June 2020. The findings from that report can be found [here](#). Expanded versions of that study were [published in July 2020](#), [September 2020](#), and [January 2021](#), each reflecting waning optimism for an autumn return to in-person live performances and a formal turn to paid digital programming after shutdowns caused by the global COVID-19 pandemic.

The study was refreshed and expanded in June 2021 and represents 226 organizations' (163 in the U.S., 15 in Canada, and 48 in the U.K.) current scenario plans for returning to in-person paid performance. The study also reveals programmatic changes, safety precautions, and consumer ticket price adjustments anticipated upon reopening. Responses reflect arts and culture organizations across all disciplines of arts and culture in the United States, Canada, and the United Kingdom.

The study does not contemplate *how* client organizations will operationalize live in-person performances. TRG has learned the delivery methods and specifics for returning to in-person performances are highly variable and rely on national and local guidance.

Majority of Organizations Planning Live, In-Person Performances this Autumn, with U.K. Most Optimistic

As the U.S. and U.K. governments publish more definitive guidelines on social gatherings, arts and culture leaders are finally able to plan live, in-person performances. 55% of U.S. organizations plan to host performances before October 2021. U.K. arts and culture organizations are even more optimistic, with 83% planning a return to performance before September 1.

Canada's slower vaccination rate has pushed plans for reopening for performances in that country until late autumn. Only 40% of participating Canadian organizations plan in-person performances prior to November.

Table 1: Organizations planning 2021 in-person performances, by country

Organization Country	% Expecting In-Person Performances, Q3 2021	Q4 2021	Not Until 2022
Canada	20%	67%	13%
United Kingdom	90%	8%	2%
United States	55%	39%	6%

Table 2: U.S. organizations planning 2021 in-person performances, by region

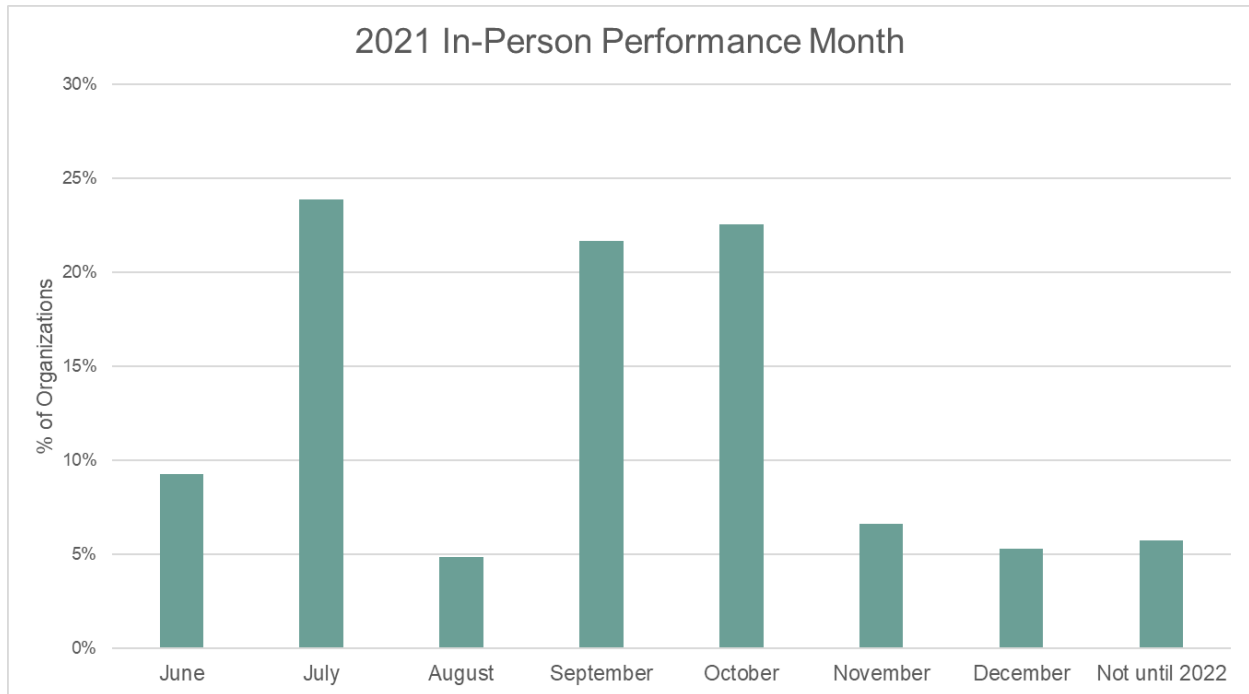
US Region	% Expecting In-Person Performances, Q3 2021	Q4 2021	Not Until 2022
Southeast	61%	36%	4%
West	59%	37%	4%
Midwest	54%	41%	5%
Northeast	51%	37%	11%
South	40%	53%	7%

Theatre, opera, and multi-disciplinary organizations are leading with the highest percentages expected to perform before Q3 2021 (11%, 25%, and 17% respectively). Dance organizations expect to come back most slowly, with 73% anticipating their first performances in Q4 2021.

Table 3: U.S. organizations planning 2021 in-person performances, by genre

Performance Genre	% Expecting In-Person Performances, Q2 2021	Q3 2021	Q4 2021	Not Until 2022
Opera	25%	25%	50%	0%
Multi-Disciplinary	17%	59%	22%	2%
Theatre	11%	48%	32%	9%
Presenter	4%	74%	22%	0%
Orchestra	0%	46%	54%	0%
Dance	0%	13%	73%	13%

Chart 1: In-person performance plans – all genres, all regions



Shifting In-Person Gathering Restrictions Leads to Late On-Sale Cycle; Seasons to Highlight Diversity

As leaders of arts and culture organizations look to local, state, and national health authorities to give approval for opening to large in-person gatherings, they have delayed putting seasons on-sale to minimize any additional impact on performers and patrons.

52% of American arts and culture organizations have not yet put multi-production subscriptions on sale as of the June Comeback Study; 80% of Canadian companies have not gone on sale with subscription. Where subscriptions are on sale, demand is largely the same as pre-COVID subscription demand.

Purchase demand patterns are similar for single event sales, with the majority of organizations not yet on sale. Where single event tickets are on sale, demand compared to pre-pandemic sales volume is weak.

Table 4: Subscription package sales demand

Demand for Subscription Package Sales	% Canadian Organizations	% U.S. Organizations
Not yet on sale	80%	53%
Demand is stronger than before COVID	0%	11%
Demand is the same as before COVID	13%	20%
Demand is weaker than before COVID	7%	17%

Table 5: Single event sales demand

Demand for Single Event Sales	% Canadian Organizations	% U.K. Organizations	% U.S. Organizations
Not yet on sale	93%	13%	74%
Demand is stronger than before COVID	0%	2%	6%
Demand is the same as before COVID	0%	15%	7%
Demand is weaker than before COVID	7%	71%	11%

At the same time, these leaders have been curating and planning comeback seasons that are comprised of a similar pre-COVID mixture of new and existing work, but highlighting the excitement of their return and adding diversity to their programmatic offerings. 66% of U.S. organizations and 58% of U.K. organizations report a programming mix that is the same balance of traditional and contemporary works as before COVID. 33% of Canadian organizations report the same programmatic balance as before the pandemic, with another 33% reporting a heavier emphasis on new or contemporary works.

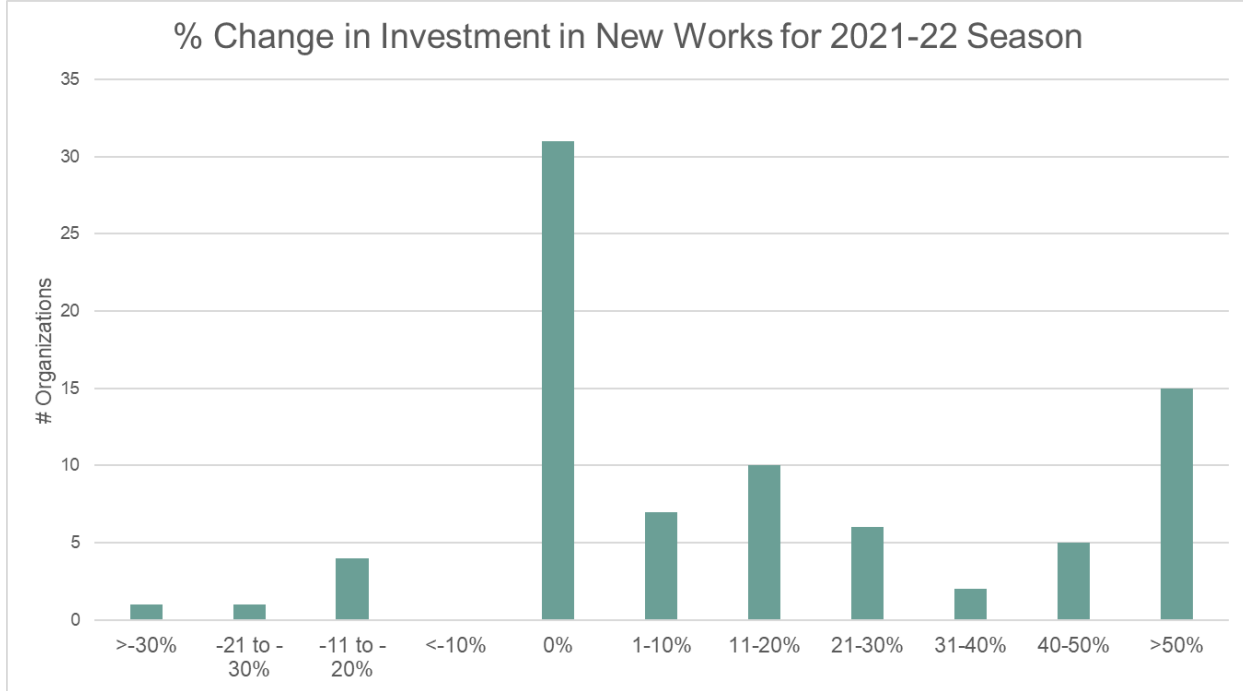
Of those organizations that are investing in a greater volume of new work, a majority are keeping the amount invested in developing those works the same as pre-pandemic.

Table 6: Type of programming offered for 2021-22, compared to pre-COVID

Programming Type	% Canadian Organizations	% U.K. Organizations	% U.S. Organizations
The same balance of traditional and contemporary works as before COVID	33%	58%	66%
Heavier emphasis on new/contemporary works	33%	4%	14%
Heavier emphasis on traditional/known works	27%	19%	14%
Programming decisions are not finalized	7%	19%	6%

Your long haul partners in building resiliency and community relevancy.

Chart 2: Amount of additional resource invested in new work creation in 2021-22



Participants were asked to describe their COVID Comeback season in three words, both from their own perspective as arts and culture leaders, as well as from the perspective of their audiences. Leaders' top responses were "diverse," "safe," and "new" while the top descriptors they hope their audiences use are "exciting," "new," and "back."

Table 7: Top descriptors of the COVID Comeback season, from leader and patron perspective

Arts & Culture Leader Perspective	Patron Perspective
Diverse	Exciting
Safe	Back
Back	New
Celebratory	Familiar
Exciting	Diverse

Safety Protocols to Vary Based on Region; No Significant Ticket Price Increases Expected

When patrons set foot inside venues for live, indoor, in-person performances again, their experiences related to COVID safety protocols will vary widely based on country and region. U.K. audiences will encounter the most robust measures, with most venues reporting usage of masks, sanitizer, and other protocols to be named by health authorities in place. Canadian organizations report the most uncertainty with regards to expected safety protocols.

13% of U.S. organizations expect the audience experience to remain unchanged from pre-pandemic, not requiring or requesting masking or other safety measures. A majority of organizations note privacy concerns around requesting or requiring proof of testing or vaccination, instead opting for making requests of patrons and trusting patrons to be honest about their testing and vaccination statuses.

Table 8: COVID safety protocols expected for audiences, by region

Protocol	% Canadian Organizations	% U.K. Organizations	% U.S. Organizations
No new safety protocols	0%	4%	13%
Sanitizer	53%	90%	55%
Masks	60%	83%	52%
Physically Distanced Seating	40%	75%	23%
Temperature Checks	13%	13%	7%
Proof of Recent Negative Test	0%	6%	3%
Proof of Vaccination	7%	4%	7%
Waiting on Local/Regional Guidance	47%	6%	21%

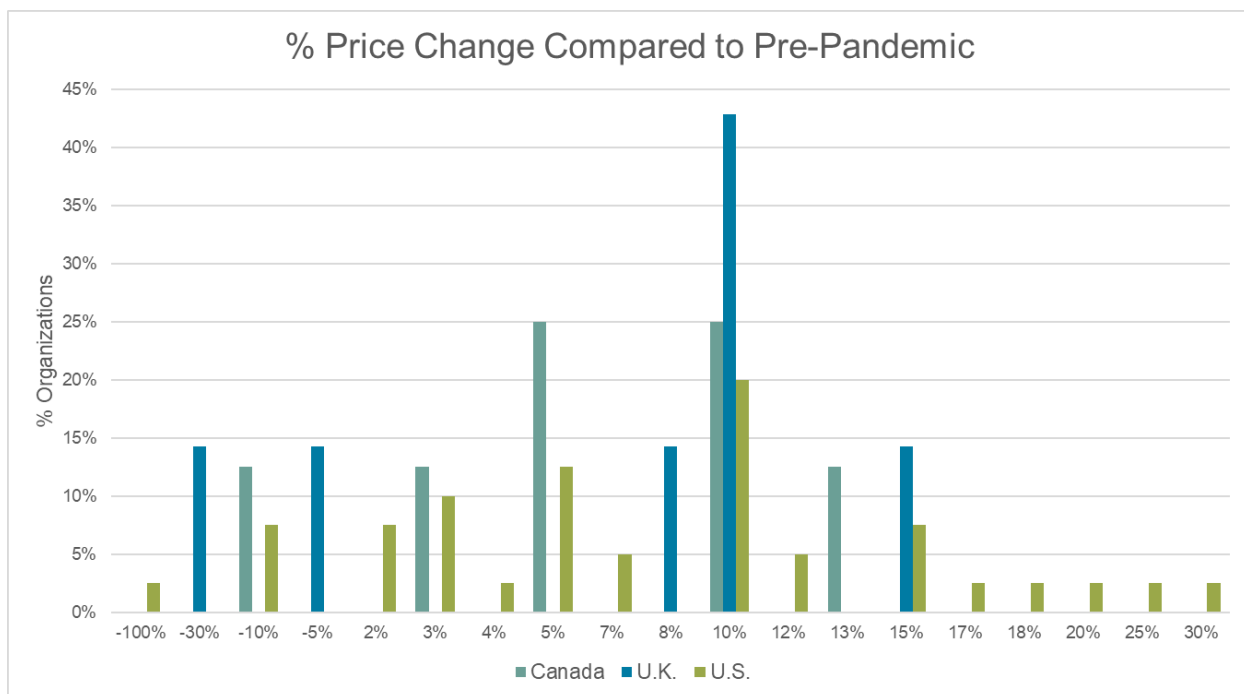
Table 9: COVID safety protocols expected for audiences, by U.S. region

Protocol	Northeast	Southeast	Midwest	South	West
No new safety protocols	6%	18%	13%	13%	17%
Sanitizer	43%	61%	64%	73%	48%
Masks	46%	50%	49%	47%	61%
Physically Distanced Seating	20%	21%	26%	27%	22%
Temperature Checks	0%	7%	5%	20%	11%
Proof of Recent Negative Test	9%	4%	0%	0%	2%
Proof of Vaccination	11%	7%	3%	0%	9%
Waiting on Local/Regional Guidance	34%	7%	23%	13%	20%

While the COVID-19 pandemic forced cancellation of performances, putting organizational revenues and sustainability at risk, a majority of arts and culture leaders are not looking to stabilize their returning organizations through increased ticket prices. 71% of arts and culture leaders have committed to keeping pre-pandemic ticket prices the same for their COVID comeback season.

Of those organizations who are anticipating a price increase, a majority are increasing prices by 10% or less. 13% of organizations are lowering prices compared to pre-pandemic, and 4% of organizations are offering Pay What You Wish for the coming 2021-22 season.

Chart 5: Price changes, by region



Ongoing Evaluation

TRG Arts is continually studying the impact of COVID-19 on the resiliency of the arts and culture field, and has made several resources free and available to all.

- TRG-30 is a bi-weekly 30-minute collection of provocative conversations with leaders in the field of arts and culture as well as adjacent industries; its goal is to inspire arts leaders to evolve institutions to become more resilient upon their return to “normal” operations.

Sign-up is free: <https://go.trgarts.com/TRG30>

- COVID-19 International Sector Benchmark studies live transactional data from across the globe. It allows participants to compare their patron purchase trends to geographic-specific benchmarks and is intended to be used for arts advocacy and planning. Participating organizations can learn how their recovery compares to other similar organizations.

Participation is free: <https://go.trgarts.com/benchmark>