

Majority of North American Arts and Culture Organizations Push Return to In-Person Performances to Autumn 2021

January Study Reveals Alternative Venue Plans, Need for Digital Content Revenue Strategy

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](#), and [September 2020](#), both 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 January 2021 and represents 104 organizations' (91 in the U.S. and 13 in Canada) current scenario plans for returning to in-person paid performance. 61% of these organizations participated in previous iterations of the study, allowing for comparison of comeback plans over time. The study also reveals plans for performing in-person in alternative venues as well as usage of paid digital programming for audience engagement. Responses reflect arts and culture organizations across all disciplines of arts and culture in the United States and Canada. Previous studies included organizations in the United Kingdom, but due to the strict lockdown protocols recently imposed in that region, these organizations were omitted from the January study.

The study does not contemplate *how* client organizations will operationalize live in-person performances. TRG has learned the delivery method 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 after July 2021

As vaccination plans and schedules emerge in North America, arts and culture leaders are taking a pragmatic approach to planning live, in-person performances in their primary performance venues. 57% of U.S. organizations do not anticipate performing in primary venues before July. Organizations in the U.S. Southeast, Southwest, and South are most optimistic, with a majority of responding organizations planning a return prior to July 2021.

55% of Canadian participating organizations plan in-person performances in their primary venues prior to July.

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

Organization Country	% Expecting In-Person Performances, Q1 2021	Q2 2021	Q3 2021	Q4 2021	Not Until 2022
Canada	31%	23%	15%	15%	15%
United States	26%	16%	30%	25%	2%

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

US Region	% Expecting In-Person Performances, Q1 2021	Q2 2021	Q3 2021	Q4 2021	Not Until 2022
Southeast	73%	9%	0%	18%	0%
Southwest	50%	50%	0%	0%	0%
South	33%	22%	22%	22%	0%
Midwest	24%	10%	34%	28%	3%
Northeast	14%	18%	41%	23%	5%
West	11%	22%	33%	33%	0%

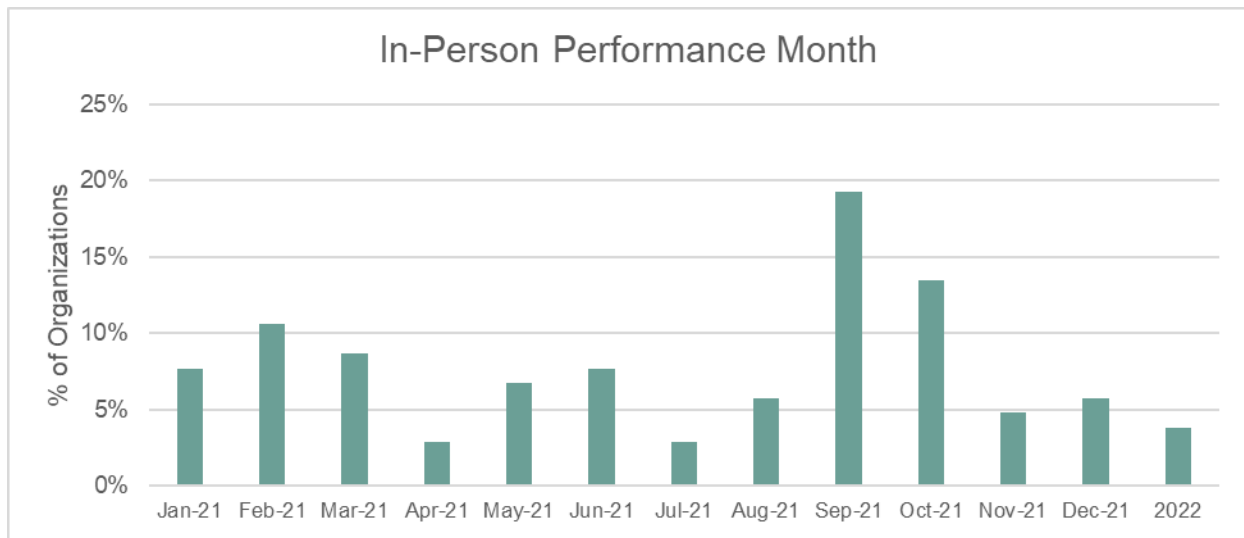
Compared to the September study, these estimates reflect additional dramatic delays to a return to in-person performances. Canadian organizations have further delayed performance plans by an average of six months, with U.S. organizations pushing performance returns an average of 3.8 months.

Dance is the genre with the most significant delays compared to the September study, averaging an additional 10.5 months. Multi-disciplinary organizations report a delay of less than one month from their original September plans.

Table 3: Organizations planning 2021 in-person performances, by genre

Performance Genre	Avg, Months Delay from September Study	% Expecting In-Person Performances, Q1 2021	Q2 2021	Q3 2021	Q4 2021	Not Until 2022
Multi-Disciplinary	0.7	70%	10%	20%	0%	0%
Orchestra	2.8	44%	11%	22%	17%	6%
Presenter	4.1	8%	15%	54%	23%	0%
Theatre	4.7	22%	24%	27%	24%	4%
Opera/Choral	6	0%	0%	33%	33%	33%
Dance	10.5	0%	0%	0%	100%	0%

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



Outdoor Alternative Venues Being Explored to Jump-Start Return to In-Person Performances

In an effort to fulfil missions and connect with audiences, arts and culture leaders are exploring performances in creative alternative venues. A majority are outdoors, which allows for easier social distancing and flexible pod-oriented seating to ensure the health and safety of patrons.

47% of respondents plan to offer paid performances in outdoor and alternative venues other than their primary performance space in 2021, with equal proportions of U.S. and Canadian organizations exploring these options. 67% of those organizations who plan to perform in alternative venues plan to do so prior to returning to in-person performances in their primary venues; 21% plan to program in alternative spaces after returning to their primary venue.

Table 4: Timing of In-person performances at alternative venues vs. primary venue

Timing of Use of Alternative Venue	% Organizations
Before performances offered in primary venue	67%
Same month as performances offered in primary venue	13%
Introduced after performances resume in primary venue	21%

Of those organizations which are exploring alternative performance locations, two-thirds expect to perform as weather warms in the months of April, May, and June 2021. 74% plan to use public spaces outdoors.

Table 5: Intention to program in-person performances in alternative space, by genre

Genre	% Organizations
Theatre	52%
Orchestra	19%
Presenter	10%
Dance	8%
Multi-Disciplinary	8%
Opera/Choral	2%

Chart 2: In-person performance plans in alternative space, all genres

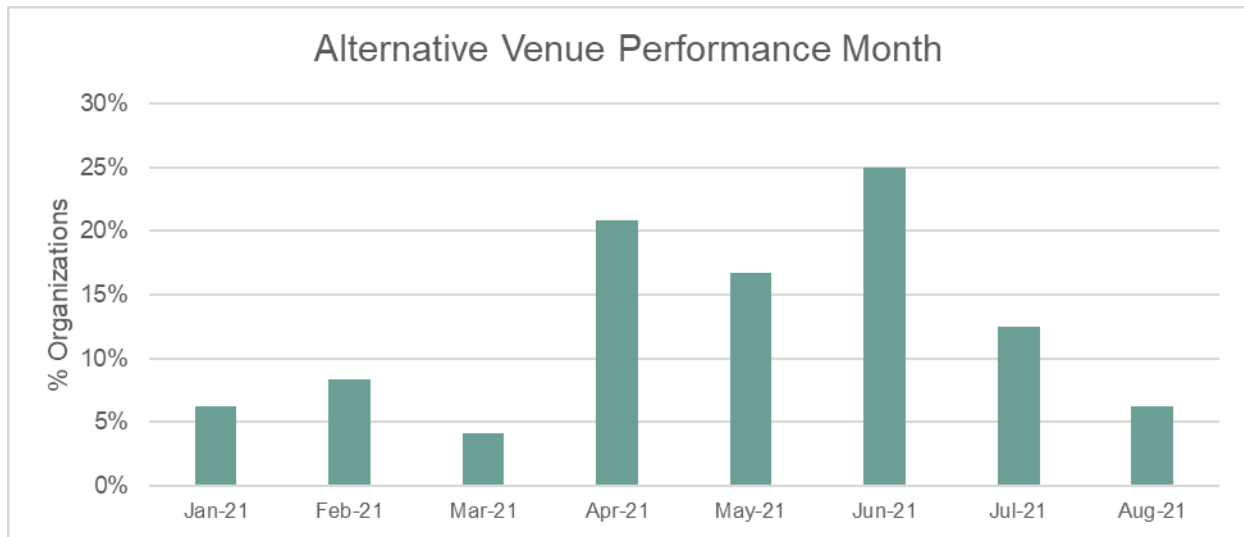


Table 6: Distribution of in-person performance plans in alternative space, all genres

Type of Venue	% Organizations
Outdoors, park/public space	35%
Outdoors, amphitheater	26%
Alt inside venue	9%
Unknown	7%
Arena	5%
Outdoors, parking lot	5%
Outdoors, private space	5%
Ballpark	2%
Zoo	2%
Drive-in	2%
Outdoors, historic landmark	2%

Digital Distribution Being Used as Relational Bridge, Not Revenue Generator

At the beginning of the pandemic, arts and culture consumers were blessed with a plethora of free digital offerings from organizations. As the seriousness and long-haul nature of the pandemic became apparent, some arts and culture organizations began offering paid digital content to audiences.

78% of participating organizations had introduced or planned to introduce paid digital programming, starting as early as April 2020. 86% of those organizations began offering paid digital content in 2020, with half introducing paid content after October 1. Of no surprise, nearly all (96%) of organizations who offered paid digital content did so prior to resuming live in-person performances.

Of those organizations offering paid digital content, 60% gave patrons the ability to watch performances on-demand, and 22% of organizations gave patrons the option to watch either on-demand or live as the performance occurred.

Table 7: Offering of paid digital programming, by genre

Genre	% Organizations
Orchestra	83%
Dance	80%
Multi-Disciplinary	80%
Theatre	80%
Presenter	69%
Opera/Choral	33%

The January study expands upon the use of digital programming to evaluate not just “how many organizations are” offering paid digital programs, but why, and to evaluate effectiveness of these efforts. The top reason organizations cited in offering paid digital programming was to remain relationally tethered to subscribers; this relational tether was the highest reason cited regardless of performance genre.

Leveraging digital content to expand the organization’s reach to new buyers ranked last in the U.S. In Canada, the lowest ranked reason cited was revenue preservation from subscribers.

Table 8: Reasons for organizations offering paid digital content

Reason	% All Organizations	% US Organizations	% Canadian Organizations
Remain relationally tethered to subscribers	90%	86%	89%
Fulfill my organization’s mission	83%	79%	67%
Remain relationally tethered to donors	77%	74%	67%
Revenue generation	57%	50%	67%
Retain subscriber revenues	49%	51%	33%
Retain donor revenues	49%	79%	67%
Grow audience base from single ticket buyers	42%	36%	56%

Organizations also rated the effectiveness of digital programming in achieving the reasons cited above on a scale of 1-5, with 5 being most effective. Here the data illuminates a delta between why content was

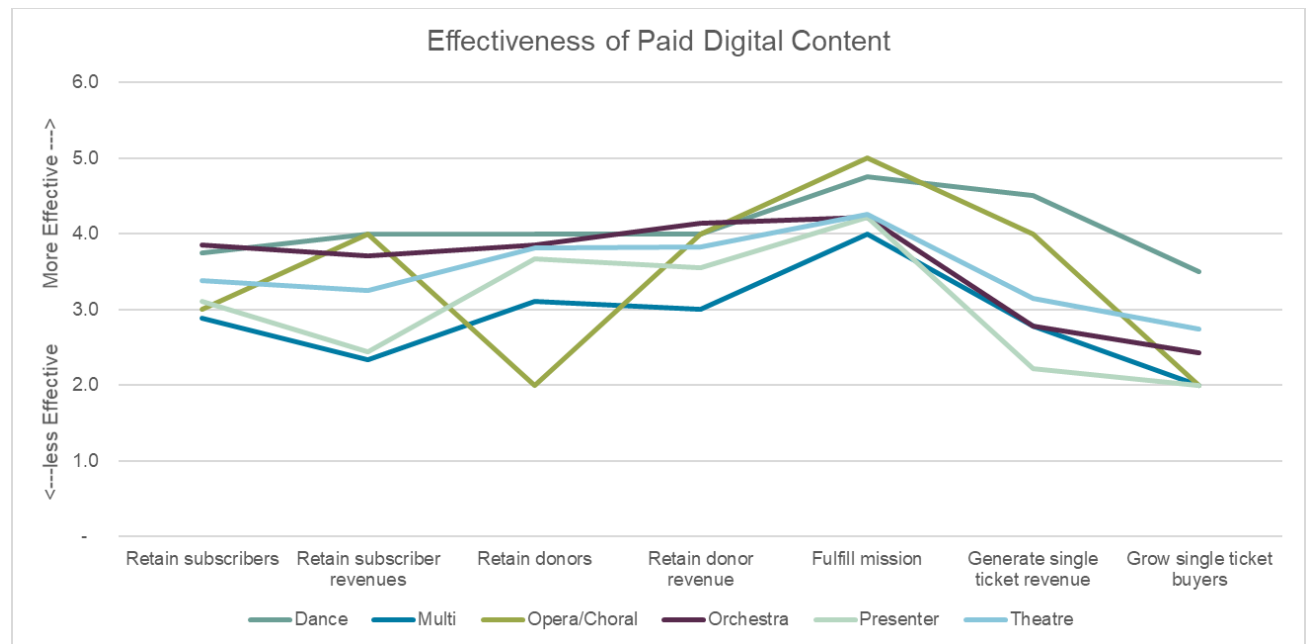
offered compared to its perceived effectiveness. Mission fulfillment was rated most highly in this regard, with relational connectivity to donors and donor revenue retention being ranked high.

Dance and opera/choral organizations rank digital effectiveness quite high across most types of engagement, whereas multi-disciplinary and presenter organizations rank digital engagement quite low. Perhaps these low ratings are unsurprising, as these organizations did not produce their own digital content, but instead offered content produced by third-party producers, artists and agents, and could not impact the content, quality, or patron experience of these digital offerings.

Table 9: Average effectiveness of paid digital content, 1-5 scale, with 5 being most effective

Reason	All	Dance	Opera/Choral	Orchestra	Theatre	Presenter	Multi-Disciplinary
Retain subscribers	3.4	3.8	3.0	3.9	3.4	3.1	2.9
Retain subscriber revenues	3.2	4.0	4.0	3.7	3.3	2.4	2.3
Retain donors	3.7	4.0	2.0	3.9	3.8	3.7	3.1
Retain donor revenue	3.8	4.0	4.0	4.1	3.8	3.6	3.0
Fulfill mission	4.3	4.8	5.0	4.2	4.3	4.2	4.0
Generate single ticket revenue	3.0	4.5	4.0	2.8	3.1	2.2	2.8
Grow single ticket buyers	2.6	3.5	2.0	2.4	2.7	2.0	2.0

Chart 3: Average effectiveness of paid digital content, 1-5 scale, with 5 being most effective



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 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 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>