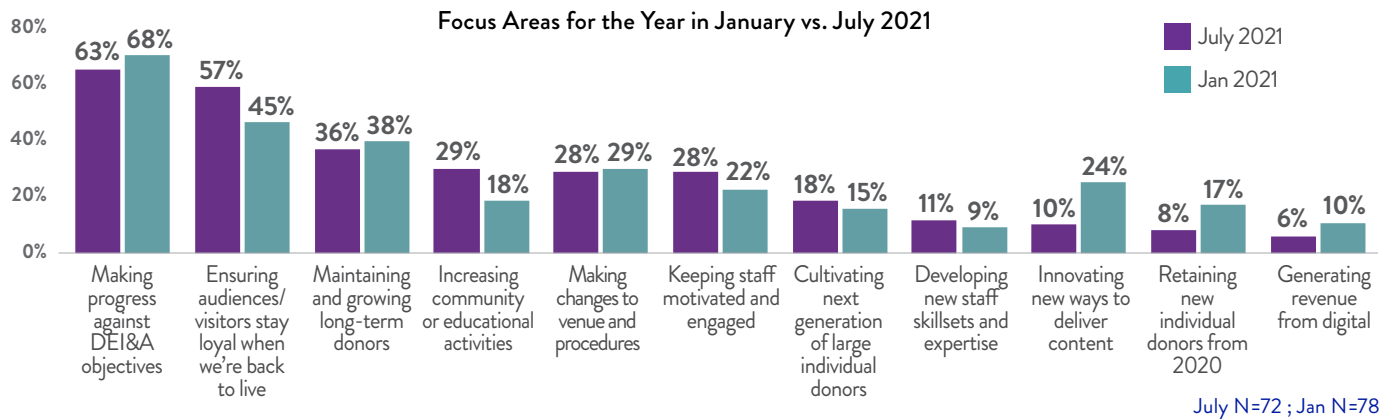


JULY 27, 2021

The Advisory Board for the Arts regularly surveys leaders at arts organizations - including operas, ballets, symphonies, festivals, theaters, venues, schools, advocacy organizations, and museums - about issues relevant to the arts world. This online survey was fielded **July 15-23, 2021**. This is the thirty-second survey of the series.

PLANS AND CHANGES TO FINISH THE YEAR STRONG

DEIA Remains Top Objective; Audience Loyalty Even More Important for Rest of Year



Most Planning for Reduced Crowds

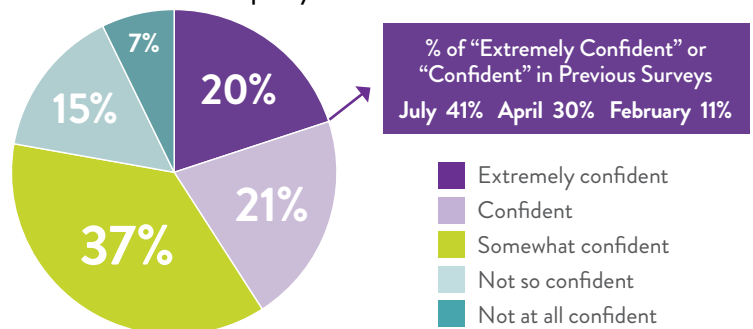
% of Pre-Pandemic Audience/Visitor Volume Orgs Anticipating Next 6 Months

71%

N=70

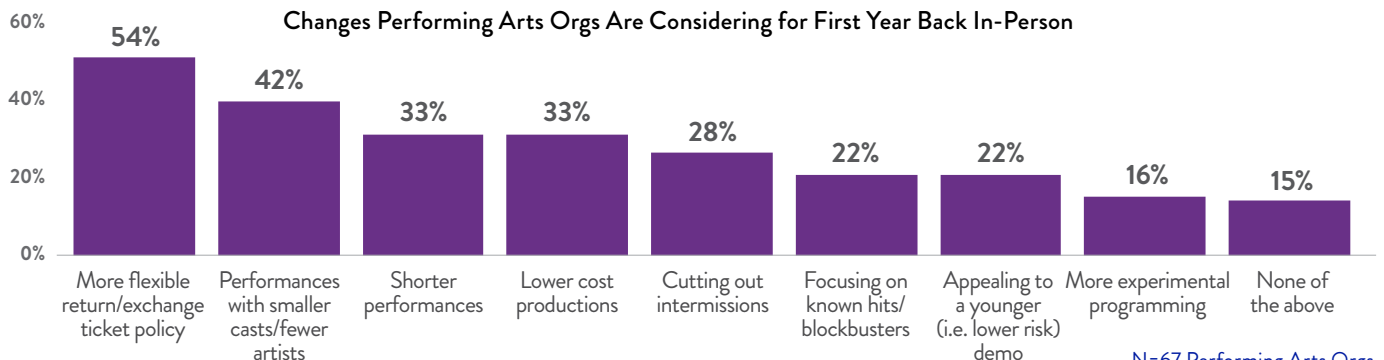
Confidence In Full Capacity Crowds Growing

Confidence in Ability to Welcome Pre-Pandemic Capacity Crowds Indoors in 2021



Orgs Mulling Many Changes for Upcoming Season

Changes Performing Arts Orgs Are Considering for First Year Back In-Person



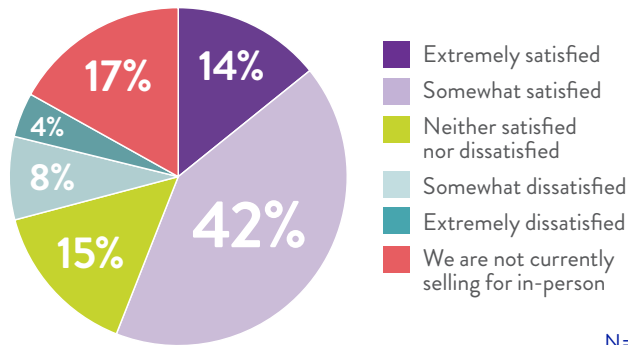
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THE STATE OF TICKET SALES AND AUDIENCE RETURN

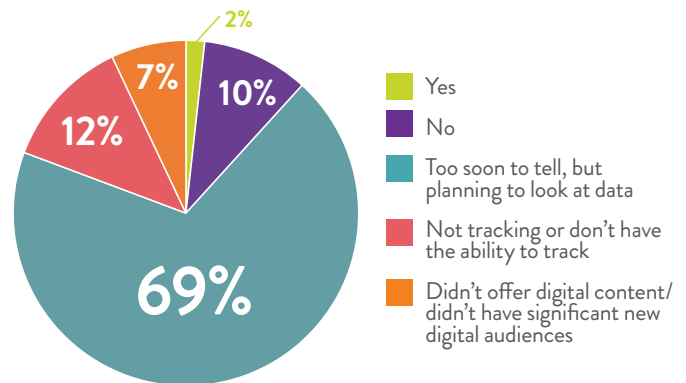
Satisfaction with Ticket and Subscription Sales Relatively High Despite Challenges; 17% Still Not Yet Selling

Satisfaction with Current Ticket/Subscription/Membership Sales



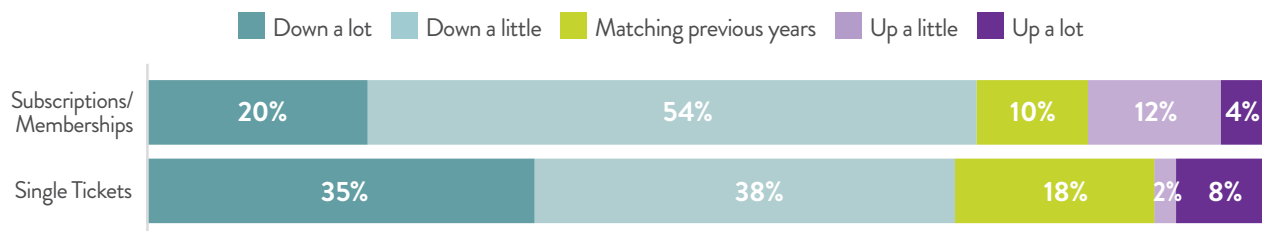
Too Soon to Tell if Digital Attendees Will Convert to In-Person

New Digital Audiences During Pandemic Buying Tickets for In-Person



For Majority, Ticket Sales Down Compared to a Typical Year

State of Current Sales Compared to Typical Year (Among Those Selling Tickets for In-Person)



Arts Orgs Most Worried About Older Audiences Not Coming Back

Type of Audience Org Most Worried Won't Be As Likely to Patronize Org as Pre-Pandemic

