



Audience Survey Executive Summary June-August 2021

Background

On June 15, 2021, NYS Governor Andrew Cuomo announced that COVID-19 restrictions were lifted in New York State. Limits on social gatherings and capacities as well as regulations on social distancing, disinfection, health screening, etc. were largely ended, although businesses could choose to keep any COVID-19 requirements in place. Masking for unvaccinated and vaccinated individuals was still required in some circumstances.

Audience Survey Overview

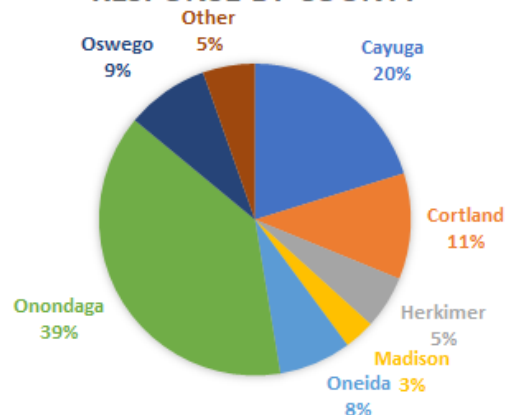
In early June, 2021, CNY Arts launched a six-question online audience survey to obtain a snapshot of the opinions of potential audience members in the seven-county region (Cayuga, Cortland, Herkimer, Madison, Oneida, Onondaga, and Oswego) about returning to in-person, live arts and cultural events. The survey ended in mid-August, with 2,000 respondents participating.

Efforts were made to reach respondents in our 7-county region through e-mail marketing, e-newsletters, and website and social media promotions. We also collaborated with a variety of arts and cultural agencies and organizations in the region to help share the survey and encourage their constituents to participate.

The charts at the end of this summary represent the final results of the survey, reflecting the opinions of the 2,000 participants in our 7 county region and beyond. The geographic breakdown of respondents was:

- 38.6% from Onondaga County
- 20.2% from Cayuga County
- 11% from Cortland County
- 8.6% from Oswego County
- 7.5% from Oneida County
- 5.5% from Herkimer County
- 3.1% from Madison County
- 5.4% from "Other" counties

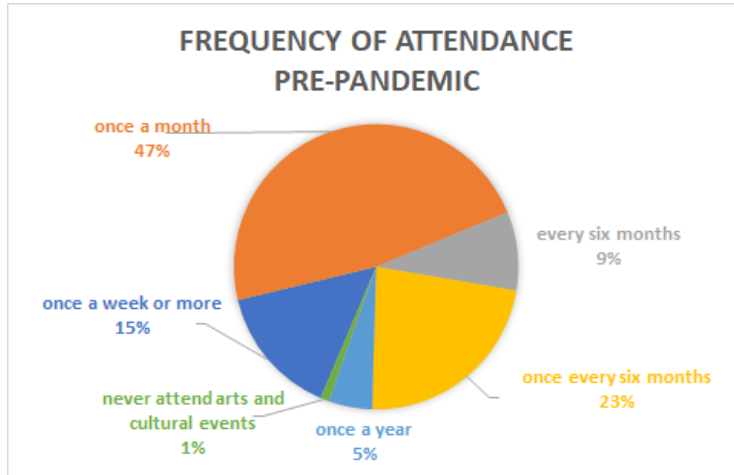
RESPONSE BY COUNTY



Responses

Prior to the pandemic, about how often did individuals attend in-person arts or cultural events of any type?*

The survey asked how often individuals were attending arts and cultural events prior to the pandemic to get a baseline of respondents' usual arts and cultural participation in more typical times.



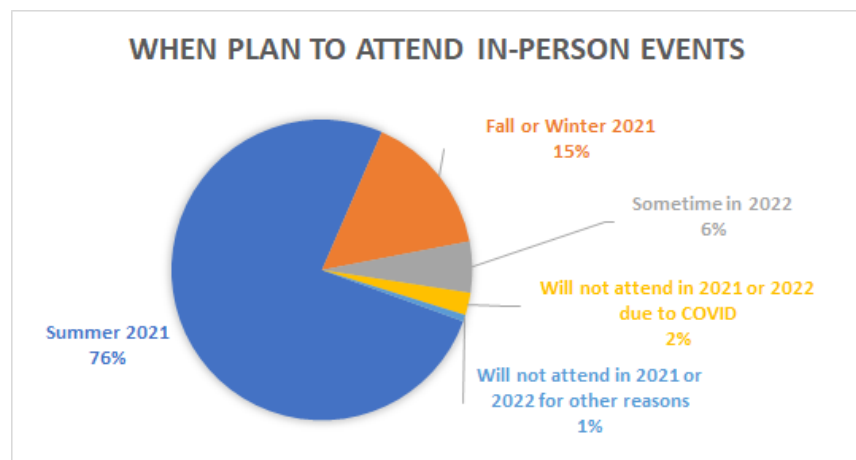
The most participants, 47.4%, selected "At least once a month or more". 22.5% reported attending at least once every 3 months, 15.2% at least once a week or more, 8.9% at least once every 6 months, and a small percentage of 1.1% indicated they never attended arts and cultural events.

*Answers regarding past attendance can be affected by individuals' varying definitions of "arts and cultural activities and events",

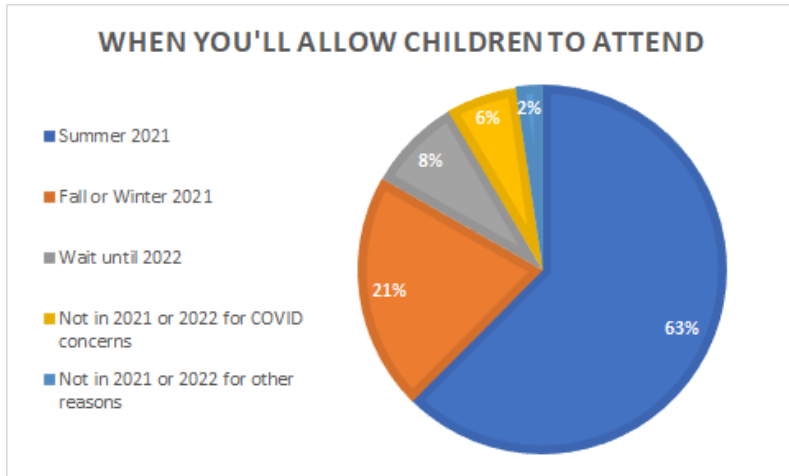
although the question included examples: "concerts, theater, exhibits, historic sites, festivals, lectures, demonstrations, workshops)". Also, their memories of attendance may not be accurate and the frequency ranges were somewhat open-ended.

When do audiences anticipate feeling ready to attend in-person arts or cultural activities?

Over 2/3 of participants, 75.9%, indicated they would be attending events this summer. The next largest sector, 15.4%, said they would return to events in Fall or Winter 2021. Of the remainder, 5.5% expected to return some time in 2022, 2.4% did not expect to attend in 2021 or 2022 due to concerns about COVID-19. Only 0.7% indicated they would not attend activities in 2021 or 2022 for another reason.



When do audiences anticipate feeling ready to have their children (under age 18) attend in-person school or community-based arts or cultural events, activities, programs, workshops, or lessons?



About 27% of all respondents answered this question. The responses indicated that people were somewhat more cautious about their children attending in-person arts and cultural events or education. Of those replying, 60% indicated being ready for their children to attend events in Summer 2021. A significant 20% said they would wait until Fall or Winter 2021, and 8% would wait until 2022.

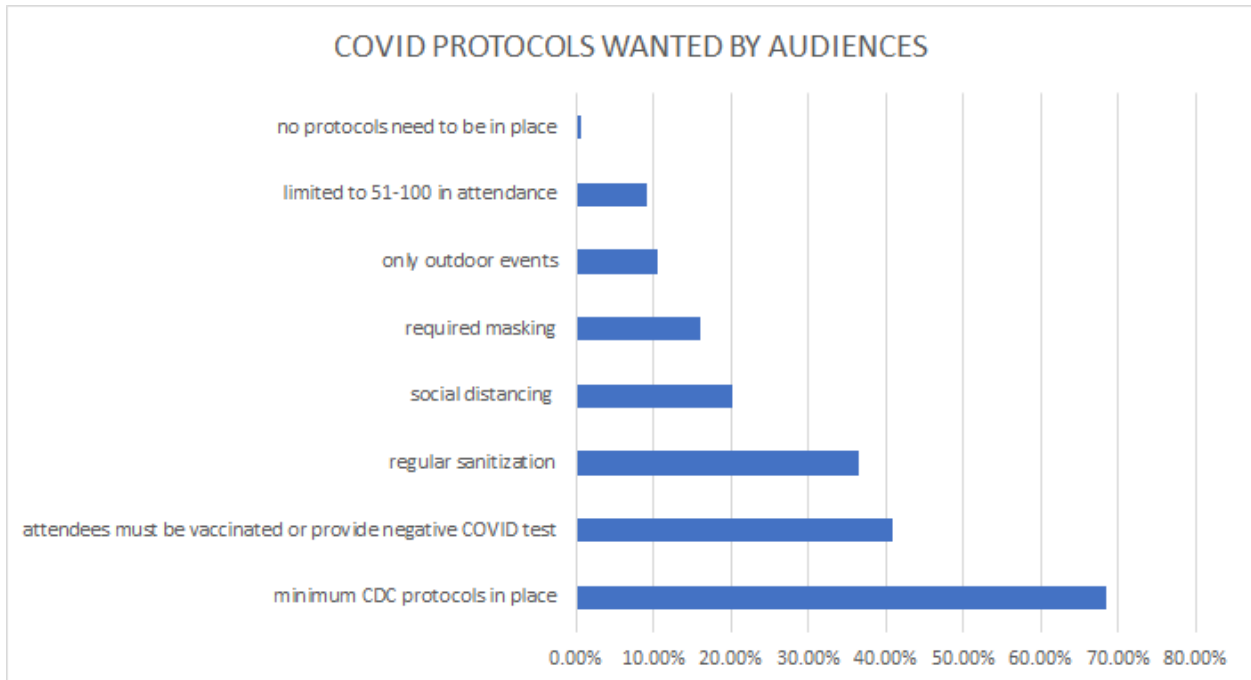
5.9% responded that they would not have their children attend events in 2021 or 2022 due to COVID-19 concerns, and 2.2% indicated they would not do so due to another reason.

What COVID-19 protocols (if any) need to be in place for audiences to feel comfortable attending in-person arts and cultural activities?

(This survey question allowed respondents to choose more than one answer.)

Overall, 68.4% indicated that they would be comfortable attending events with minimum CDC protocols in place (whatever they are at the time). However, a large portion, 40.8%, wanted attendees to be vaccinated or to provide a negative COVID-19 test.

36.4% wanted regular sanitization of surfaces, 28.1% preferred that indoor events have an upgraded ventilation system, 20.1% wanted social distancing in place, and 16% wanted masking. 10.5% of respondents said events they attend would need to be outdoors. A small number checked off attendance limits -- 9.1% preferred 51-100 attendance limit. Just 0.6% of respondents said there were not any protocols they would need to have in place to attend in-person arts and cultural events.

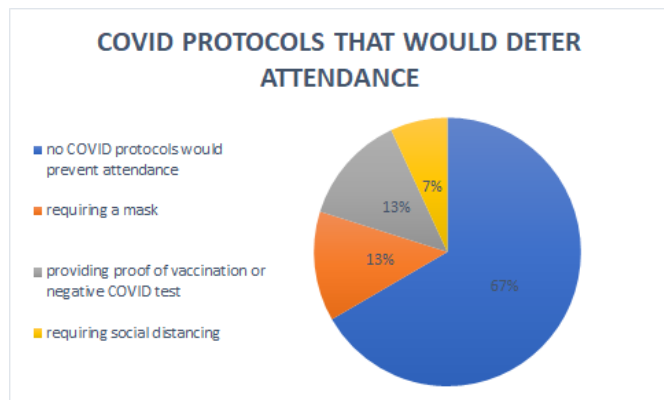


An important caveat: Protocols were changing during the survey, so it's possible some stated requirements might not be required by individuals now if they were also not currently required by the CDC.

What COVID-19 protocols (if any) would make people less likely to attend an in-person arts and cultural event?

(This survey question allowed respondents to choose more than one answer.)

Since there are widespread examples of sharply divided opinions on COVID-19 protocol requirements and perceived necessity, the survey also asked if any protocols would likely PREVENT an individual's attendance at arts and cultural events.



74.1% of respondents said there were not any protocols that would prevent their attendance. However, 15% said requiring masking would make them less likely to attend an event, 14.7% said requiring proof of vaccination or a negative COVID-19 test would deter their attendance, and 7.7% said requiring social distancing would make them less likely to attend.

Conclusion

According to our survey data, more than 2/3 of adult respondents felt ready by June to return to in-person arts and cultural events and activities. Respondents were somewhat more conservative with when they would have their children return, but most thought they would be attending arts events and education by this fall or early winter.

There was more variation on the types of protocols people want to have in place to feel confident of their safety upon return. Well over half appear to trust CDC regulations on that topic.

So, overall a majority of people this summer showed a desire to get out and support arts and cultural events. However, this willingness continued to flux in response to the level of threat from COVID-19 and its variants.

Audience response was not static throughout the survey period, which began in May 2021 and ended in mid-August 2021. We noticed a big drop during the first 2 weeks of August in the number of people responding that they will attend events this summer. Comparing samples from May and July, the percentage of people willing to attend events this summer between those two time frames **dropped by half**. This correlates with the timing locally in a rise in COVID-19 cases, in particular, the Delta variant.

This effect was reflected nationally - The results of a survey released by [Audience Outlook Monitor](#), a research collaborative that is tracking respondents over time from audience sources across the nation, also reveal a significant recent change in potential audiences' willingness to attend live events. They reported that *"August results show a dramatic decrease in readiness to return to cultural events - roughly 20% of hypothetical demand evaporated between July and August."*

The CNY Arts Audience Survey helped to demonstrate patrons' eagerness to return to the arts, particularly in early-mid summer, and a general trust in CDC regulations to guide protocols at venues. However, there was a significant difference of opinion in the extent of protections required for patrons to be willing to attend in-person events, with families with children under 18 demonstrating more caution. If the vaccine rate increases in the near future - for instance, with the expected availability of a COVID-19 vaccine to children aged 5 to 11 this fall -- and COVID-19 cases continue to decline in our region, we expect we will see another uptick in live arts attendance.

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