

# ARTS AUDIENCE PARTICIPATION SURVEY

## SUMMARY OF RESULTS

**Prepared by City of Bellevue  
September 2020**



*City of Bellevue*  
**Arts & Culture**

**In partnership with the Eastside Arts & Culture Coalition  
and the Cities of Issaquah, Kirkland, Redmond and Renton**

# EXECUTIVE SUMMARY

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## BACKGROUND

Arts, cultural and educational experiences have been heavily impacted during this time of stay-at-home and social distancing to slow the spread of COVID-19. The goal of this survey was to better understand how audiences are feeling and to provide useful information to organizations and artists as they develop or consider programs for their own arts community. The City of Bellevue created this survey in partnership with Issaquah, Kirkland, Redmond, Renton and the Eastside Arts and Culture Coalition. In total, the Eastside Arts Audience Participation Survey received 1,074 responses in the seven out of eight languages it was offered in.

## ABOUT THE FINDINGS

This survey should be considered a “moment in time” because presumably perceptions, particularly around safety of in-person events, will change. It is also focused on Eastside audiences (Renton up to Bothell and east) that may have different levels of comfort than other audiences. Also of note, this survey is not statistically valid. That said, it does provide a window into what different types of audiences are experiencing in

this mostly virtual arts world, how they feel about returning to in-person events of different sizes and whether they are interested in new ways of experiencing their chosen artforms.

Survey responses were collected from June 19th to July 17th, 2020. Languages offered included Chinese (Traditional), English, Japanese, Korean, Russian, Spanish, Ukrainian and Vietnamese. Outreach for the survey was done largely through the networks of arts organizations themselves, Bellevue’s and partner city’s social media channels, press releases and outreach to diverse groups.

It is important to note that the survey responders on average were older, but for example the 30 respondents (roughly 3%) under the age of 18 still provide useful information. Additionally, while Bellevue residents made up the largest percentage of respondents (38.4%), there was representation from all Eastside cities, most towns, and unincorporated areas as well.

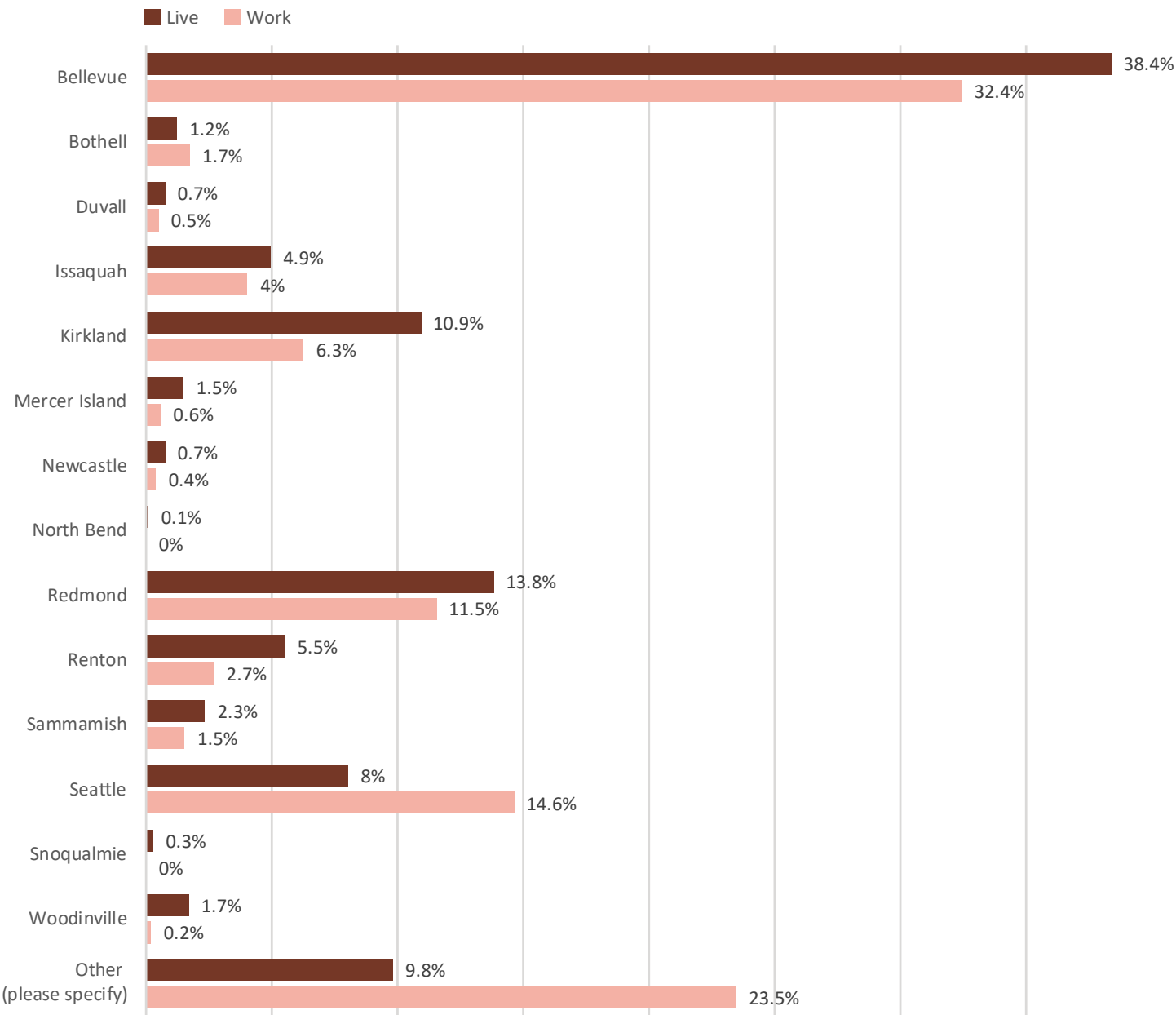
# PART I: AUDIENCE PROFILE

## Question 1: What city do you live in?

Answered: 1,071 Skipped: 3

## Question 2: What city do you work in?

Answered: 1,039 Skipped: 35



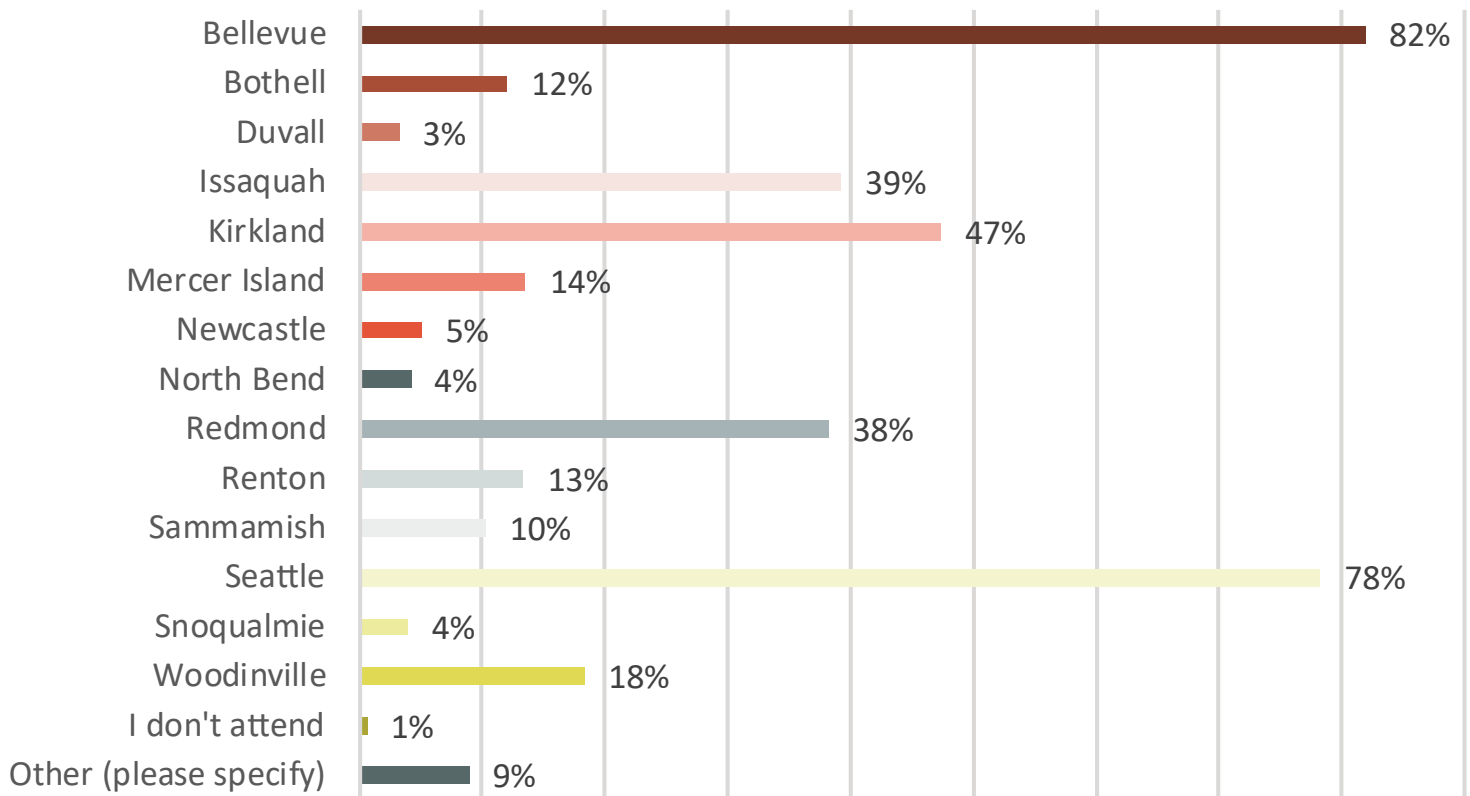
### KEY TAKEAWAYS:

- **Representation Across the Eastside:** The survey received some level of representation from all Eastside cities with Bellevue leading at 38.4% of respondents.
- **On Where People Work:** “Other” typically meant

retired, virtually or unemployed. Respondents being retired, pre-job (under 18), work-from-home or unemployed may be the reason behind the higher number that skipped the work question.

### Question 3: In which city or cities do you attend arts, cultural or educational experiences? (check all that apply)

Answered: 1,071 Skipped: 3



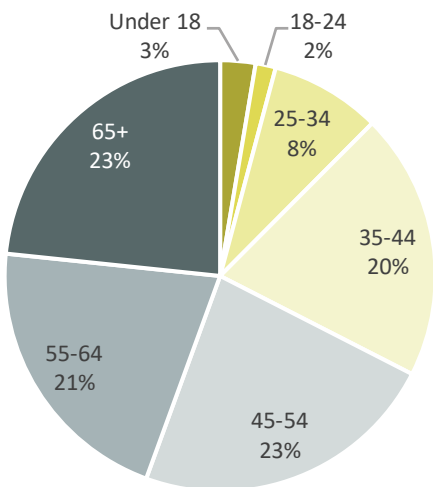
#### KEY TAKEAWAYS:

- **Bellevue led all cities as a destination for arts, cultural or educational experiences at 82%,** outpacing Seattle at 78%.
- **A Connected Eastside:** Responses to this question illustrate that participation in arts, cultural and educational experiences doesn't stop at the border of Eastside cities. Some examples include:
  - **Issaquah:** 4.9% of respondents live in Issaquah vs. 39% of respondents attend experiences there - roughly 8 times the respondent population
  - **Redmond:** 13.8% of respondents live in Redmond vs. 38% attend experiences - roughly 3 times the respondent population

- **Woodinville:** 1.7% of respondents live in Woodinville vs. 18% attend experiences - roughly 10 times the respondent population
- It is important to note that **respondents were a highly engaged arts and cultural audience** with only 1% of respondents not attending events.

#### Question 4: What is your age?

Answered: 1,058 Skipped: 16

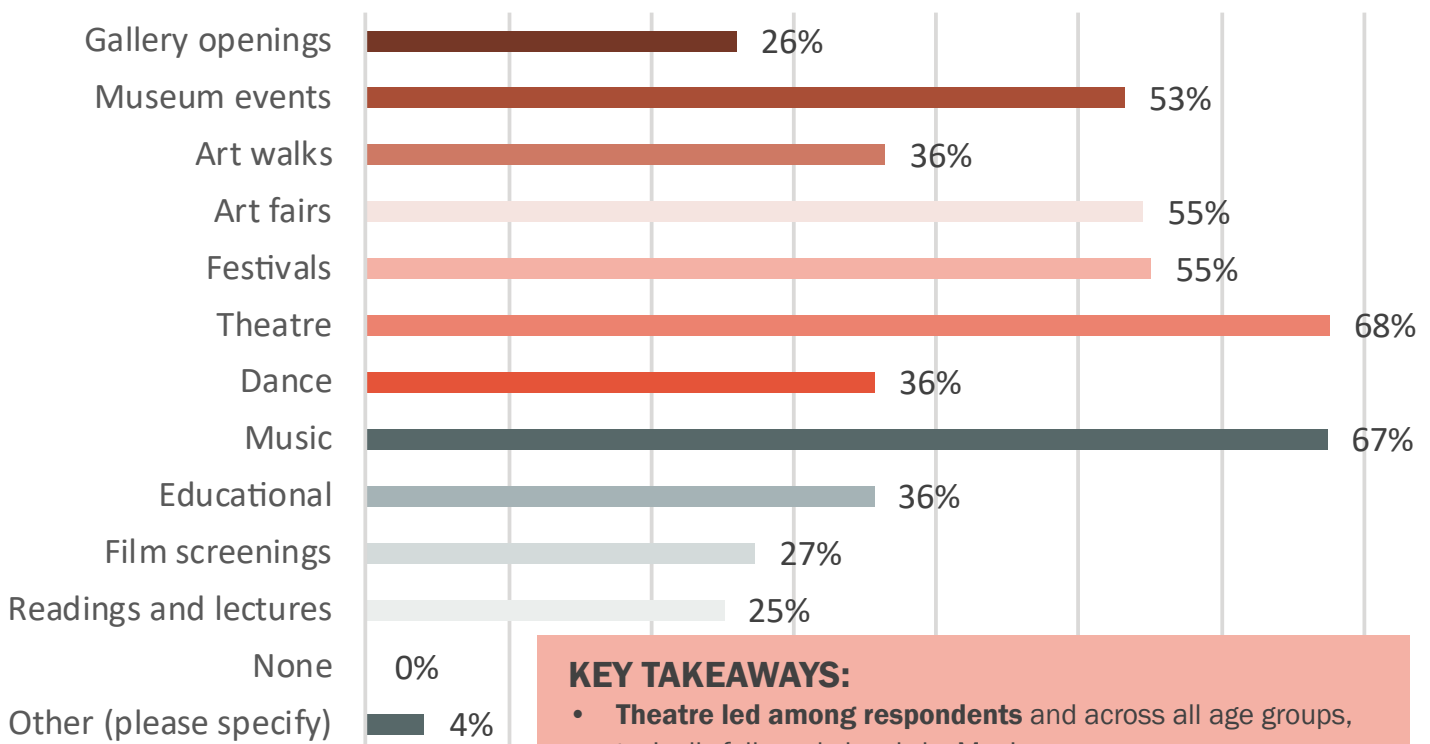


#### KEY TAKEAWAYS:

- **44% of respondents were 55 years of age or older.** That is far higher than the actual population of the Eastside with 23% 55 years and older. Only 3% of respondents were under 18 vs 23% of the actual population. While the percentage of respondents age 18-24 was just 2%, this group makes up only 6% of actual Eastside population.
- Many arts, cultural or educational experiences appeal more to different age groups. For example, using age as a filter on the types of events respondents normally attend, **only 4.5% of people under 24 attended gallery openings.** Conversely, as age increased respondents were far more likely to attend gallery openings with 32% of people 55 years and older attending gallery openings.

#### Question 5: What types of arts, cultural and educational experiences do you normally attend most? (Check all that apply)

Answered: 1,072 Skipped: 2

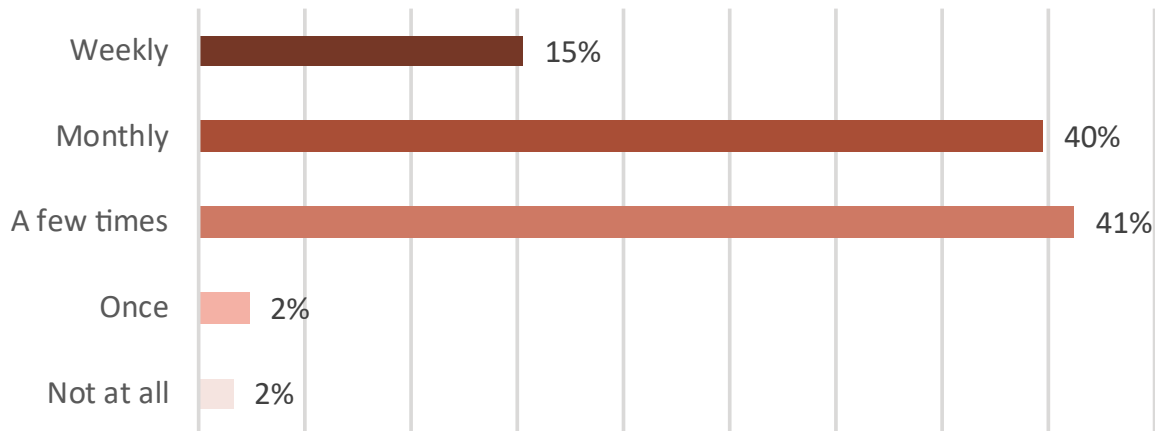


#### KEY TAKEAWAYS:

- **Theatre led among respondents** and across all age groups, typically followed closely by Music.
- **Age:** Under 18 respondents overwhelmingly favored Theatre and Dance.
- **Music** consistently ranked high among all age groups.

## Question 6: Within the past year, how often did you attend an art, cultural or educational experience in person?

Answered: 1,071 Skipped: 3



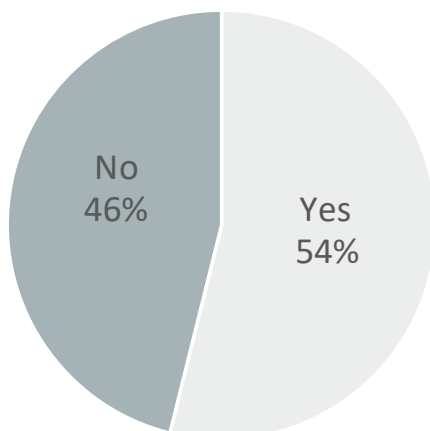
### KEY TAKEAWAYS:

- **96% of respondents** attended experiences at least a few times a year.
- **54% of respondents** under the age of 18 attended experiences weekly.
- **18-24 year-olds and 25-34 year-olds** attended events less frequently than other age groups with

50% and 56% respectively attending experiences a few times within the past year compared to only 36% of all other respondents with higher percentages attending experiences weekly or monthly.

## Question 7: Within the past year, have you had season tickets or memberships to any arts, cultural or educational organizations?

Answered: 1,069 Skipped: 5



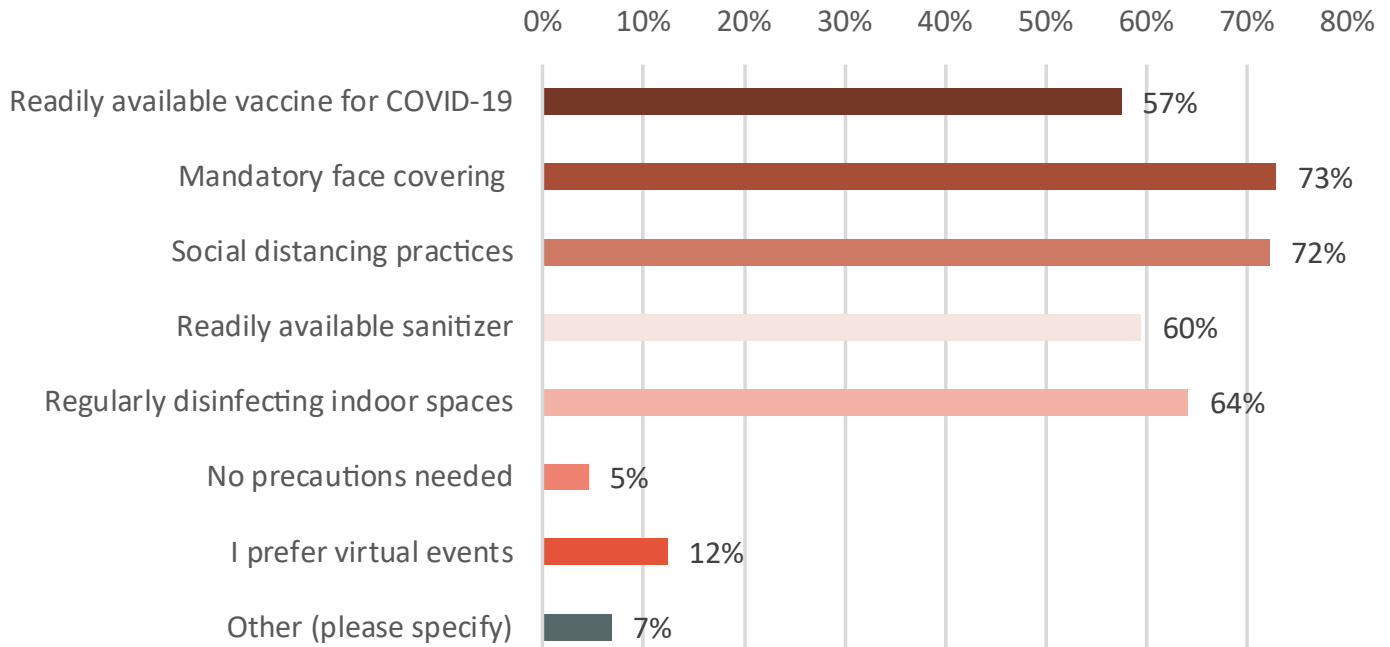
### KEY TAKEAWAYS:

- This question was requested by a number of Eastside organizations. Understanding whether an engaged audience also hold season tickets or memberships can be informative to how organizations build their revenue models and safety protocols.
- **Frequency:** Season ticket/membership holders attend events more frequently (71% at least monthly compared to 35% among non-season ticket/membership holders).
- **Paid Virtual Events:** 37% of season ticket/membership holders paid for virtual events compared to 27% of non-season ticket/membership holders.

## PART II: IN-PERSON PARTICIPATION

**Question 8: Once Washington State allows in-person arts, cultural or educational experiences, which of the following COVID-19 accommodations would you require to feel comfortable attending? (Check all that apply)**

Answered: 1,042 Skipped: 32

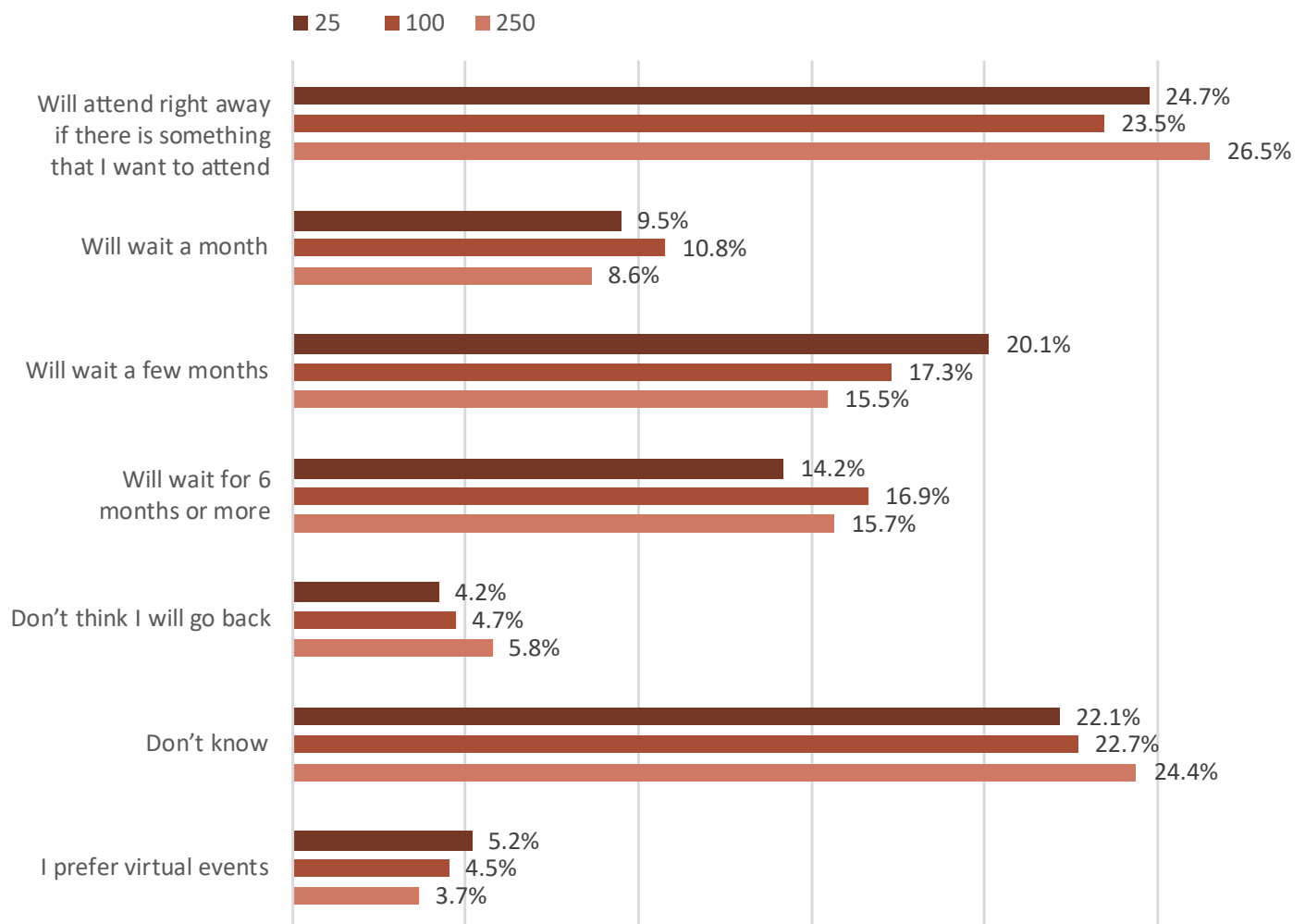


### KEY TAKEAWAYS:

- **Only 5% of respondents** didn't need any additional precautions to feel comfortable attending arts, cultural or educational experiences.
- **57% of respondents** wanted a readily available vaccine before feeling comfortable attending experiences.
- **"Other" Responses:** themes in responses included updated HVAC systems or quality ventilation, low infection rates on top of a readily available vaccine, a preference for outdoor events vs indoor events during the pandemic, safety monitors, and a preference for virtual events.
- **Age:** there wasn't a huge variation in responses among different age groups. Minor differences include people under 18 slightly more comfortable returning to in-person experiences without a vaccine and respondents that didn't need any precautions trended down the older the age of the respondent.
- **Season Ticket/Membership Holders:** this group of respondents consistently favored more precautions than non-season ticket/membership holders including a readily available vaccine, mandatory face coverings, social distancing practices, readily available sanitizer and regularly disinfecting indoor spaces.

## Question 9-11: Once Washington State allows gatherings of 25, 100, and 250 or more people, how long would you wait before attending an in-person art, cultural or educational experience?

Question 9 Answered: 1,042, Skipped: 32 | Question 10 Answered: 1,040, Skipped: 34 | Question 11 Answered: 1,041, Skipped: 33



### KEY TAKEAWAYS:

- **A moment in time:** Responses to this question should be considered as a moment in time and may not be indicative of how Eastside arts audiences are feeling now.
- There is some variation from smaller to larger gatherings but not significant.
- **22% to 24% of respondents** not knowing how long they would wait to attend gatherings of different sizes seems to represent a lot of uncertainty about future conditions.

- **Age:** The percentage of respondents that didn't know how long they would wait steadily increased by the size of event up to 33% of respondents 65+ not knowing how long they would wait to attend gatherings of 250 or more.
- **Season Ticket/Membership Holders:** Respondents that had season tickets/memberships were slightly more likely to attend small events right away (26% vs 23%). The larger the gathering this flipped with holders less likely to attend right away and uncertainty increasing.



## PART III: ALTERNATIVE PLATFORMS FOR EXPERIENCING ARTS, CULTURE AND EDUCATION

**Question 12: Since March of this year, have you attended or participated in any paid and/or unpaid virtual art or cultural program or educational experience?**

**(Check all that apply)**

Answered: 996   Skipped: 78

### KEY TAKEAWAYS:

- **Note:** Responses to this question seem to indicate that respondents were confused about what was being asked. Therefore, the only numbers that we do have confidence in are the numbers of respondents that attended paid virtual experiences.
- **Paid Virtual Experiences:** 33% of respondents indicated that they had attended a paid virtual experience.
- **Season Ticket/Membership Holders:** 65% of respondents that paid for virtual arts, cultural and educational experiences were season ticket/membership holders. Comparing this to the percentage of season ticket/membership holders that paid for experiences (37%) there appears to be an opportunity for organizations to increase paid content geared towards season ticket/membership holders.
- **Age:** 61% of respondents under 18 attended a paid virtual experience. Respondents 45 to 64 made up 48% of those that paid for a virtual experience. This slightly outpaces their share of the total population (44%) of respondents (Question 4 on age).

**Question 13: Has anything limited your virtual participation, such as price or access to the Internet? (fill in the blank)**

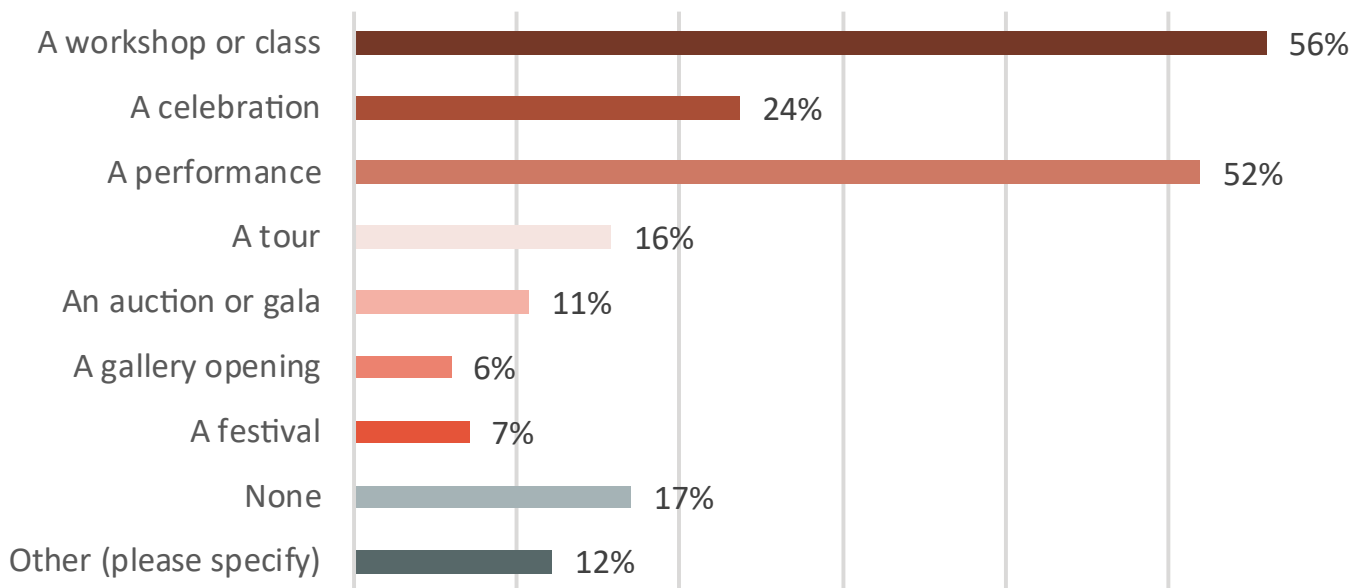
Answered: 610   Skipped: 464

### KEY TAKEAWAYS:

- **Most respondents had no limitations** to virtual participation.
- **Other consistent responses included:**
  - ☐ Speed, availability and reliability of Internet
  - ☐ Online fatigue after on-line meetings at work
  - ☐ Sound quality over the Internet
  - ☐ Patience with connectivity issues
  - ☐ List of available virtual events
  - ☐ Experience doesn't warrant the cost
  - ☐ Lack of interest in virtual experiences
  - ☐ Timing of events can be challenging for people with jobs
  - ☐ Concerns about virtual platforms getting hacked or lack of platform accounts
  - ☐ Unemployed or limited income

## Question 14: What types of arts, cultural and educational experiences have you attended or participated in virtually? (Check all that apply)

Answered: 975 Skipped: 99



### KEY TAKEAWAYS:

- **56% of respondents had attended a virtual workshop or class** followed closely by attending performances (52%).
- **“Other” Themes Include:** Book clubs, art demonstrations on Instagram, group practices, readings, conferences, artist talks, artwork

critiques, museum/gallery tours, movie screenings, and open mic and trivia nights.

- **Age:** 76% of respondents under the age of 18 attended a workshop or class. 29% of 25 to 34 year-olds attended a celebration outpacing other groups. Performances ranked high across all age groups except 18 to 24 year-olds (23%).

## Question 15: Please describe what, if anything, you like or enjoy about virtual arts, cultural and educational experiences? (fill in the blank)

Answered: 577 Skipped: 497

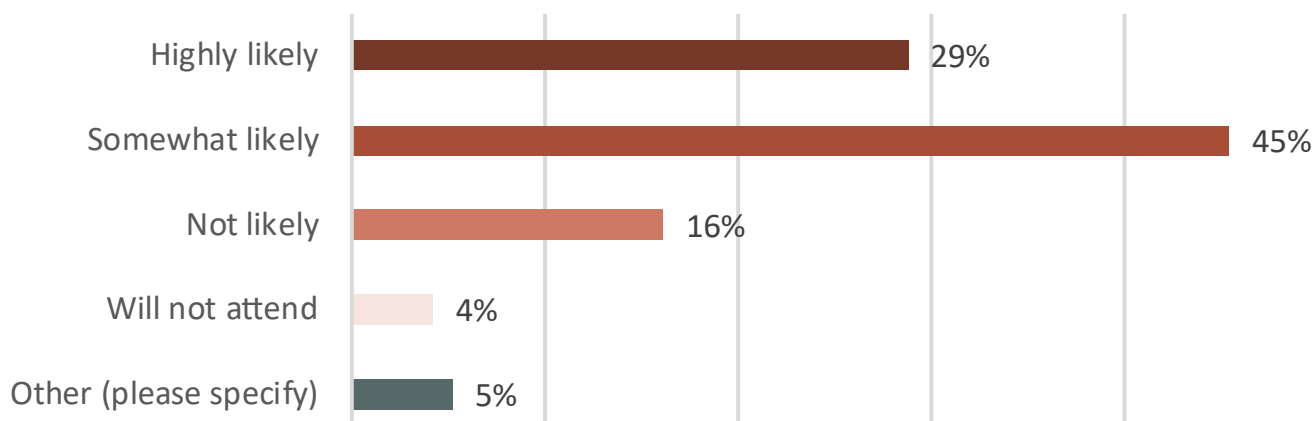
### KEY TAKEAWAYS:

- **Overwhelmingly respondents cited the convenience and accessibility of virtual experiences**, also often noting that they are no longer limited by regional offerings but can engage internationally.
- **Other consistent responses included:**
  - Not having to travel
  - Flexibility to view recorded performances

- Virtual experiences are often cheaper
- Virtual classes can accommodate students that may feel shy, or uncomfortable performing during in-person classes
- Connecting with community
- Virtual events can feel more personal
- Parents can attend events without hiring a sitter removing additional fiscal and logistical hurdles for participation

## Question 16: If an art, cultural or educational experience that interested you offered the event outdoors and practiced physical distancing, how likely would you be to attend?

Answered: 990 Skipped: 84



### KEY TAKEAWAYS:

- **74% of all respondents were somewhat or highly likely to attend** an art, cultural or educational experience they were interested in if offered outdoors with physical distancing.
- **Age: 80% of respondents under the age of 65** were highly or somewhat likely to attend although this trended down from younger to older groups.
- **Season Ticket/Membership Holders:** Season ticket/membership holders led all other

respondents as “highly likely” (30% vs 27%).

- **The “Highly Likely” Respondents and Events They Normally Attend (Question 5):** Of the respondents that were “highly likely” to attend an event if outdoors with distancing, 43% normally attend dance experiences compared to 36% of all respondents. This group attended events like festivals higher (60% vs 55% all) and attended educational experiences, readings and lectures, and art fairs less than all respondents.

## Question 17: How have arts, cultural and educational experiences, or the lack of, impacted you during the pandemic? (fill in the blank)

Answered: 710 Skipped: 364

### KEY TAKEAWAYS:

- Many respondents expressed that they felt there was a **“void” or “feeling of loss”** in their lives with so many arts, cultural, or educational experiences canceled.
- **Others missed the community and social aspect** of in-person events and large events such as festivals, ballet, theatre and other performances.

### Other consistent responses included:

- ❑ Loss of employment or full-employment (artists or other types of employment)
- ❑ Artists incomes have dropped or disappeared
- ❑ More difficult to support local artists
- ❑ Depression and feeling disconnected
- ❑ Kids feeling less creative and imaginative
- ❑ Impacts to relationships - loss of “date nights”
- ❑ Virtual events have given people something to look forward to