

Introduction

The COVID-19 pandemic and subsequent response had a profound impact on the economy. That impact fell especially hard on the arts; music venues, theatres and arenas were forced to close immediately and indefinitely. In Vermont, the Arts, Entertainment and Recreation sector was among the hardest hit. Statewide total nonfarm employment fell by 15.3% between January and May of 2020. Meanwhile, employment in Arts, Entertainment and Recreation fell by 44.2%. By March of 2021 statewide employment remained 8.3% below January 2020; Meanwhile, Arts, Entertainment and Recreation was still down 27.9%. While no hard data is available any review of event listings will confirm that the industry is still suffering and most venues remain closed or serving at very limited capacity.

The vaccine rollout is progressing and the most recent announcements from the Scott administration indicate that most areas of the economy will fully reopen by July 4th. The Vermont Department of Labor recently partnered with the University of Vermont's Center for Rural Studies to conduct a survey of Vermonters in order to assess their willingness to return to live art events and how the pandemic has changed their perspective on attending them.

Sources

The data for this survey was collected by the Center for Rural Studies at the University of Vermont as part of the annual Vermonter Poll survey. The survey was conducted using email-based outreach beginning March 16th, 2021 and ending April 5th, 2021. The random sample was drawn from commercially-available email lists. Vermonters over the age of 18 were eligible to participate.

511 people completed the survey. The overall study results have a

margin of error of plus or minus 4.3% at a confidence level of 95%.

Results

Prior to the pandemic, 15.9% of respondents never attended art, music, theater or cultural events while another 40.0% attended less than once per month. Well over half (55.9%), therefore, rarely if ever attended. 29.6% attended 1 or 2 per month on average and 9.6% attended 3 to 4. 2.5% attended 5 or more per month.

Respondents were asked what conditions must be met before they will feel safe attending an indoor performing arts event. They were then presented with three conditions. 31.1% said they will feel safe when public officials state it is OK to resume large indoor gatherings. 39.1% said they will feel safe when a vaccine is widely available. 29.9% said they would feel safe when the number of new cases in Vermont is negligible (5-10 / day) while 23.3% chose all of the above. 13.3% stated they would never be willing to attend indoor performing arts events again. Multiple responses were allowed so the total will exceed 100%

Breaking down the analysis by how often a respondent attended live events prior to the pandemic didn't produce any stark differences. For the purposes of this analysis we divided the group into three cohorts:

First, "Very Frequent Attendees", 87 individuals who reported they attended at least three art events per month prior to the pandemic.

The second cohort, "Frequent Attendees" consists of 174 individuals who reported they attended approximately between one and three art events per month.



The third cohort, "Occasional Attendees" consists of 167 individuals who reported they attend art events but at a rate less than one per month. A fourth cohort, respondents who never attend these types of events (n = 66), was excluded from the analysis. See Table 1.

Table 1: Conditions that must be met before returning by frequency of attendance

Condition	Occasional Attendees n = 167	Frequent Attendees n = 174	Very Frequent Attendees n = 87
Public officials state it is OK to resume large indoor gatherings	41.3%	46.0%	52.9%
A vaccine is widely available to Vermonters	62.9%	58.6%	62.1%
New cases in Vermont are negligible	43.7%	48.3%	41.4%
I already feel safe attending indoor events now	13.2%	14.9%	25.3%
Not sure I'll ever be willing to attend again	9.6%	8.6%	9.2%

Multiple responses allowed. Totals may not sum to 100%

The only place where significant differences appear is in the question regarding whether people currently feel safe attending events (note: this poll was conducted in March and April, 2021). On that response, about 14% of Occasional Attendees and Frequent Attendees said

they currently feel safe attending while just over 25% of Very Frequent Attendees reported as much.

The survey also asked respondents about their interest in watching an online, live performance. Among 503 respondents a plurality (33.8%) said they would not be interested in watching at any price, even free of charge. An additional 20.0% of respondents said they would only be interested in watching in such a format if it was free.

31.9% of respondents said they would be willing to pay at least some amount to view a live performance online. They were unevenly divided between a cohort willing to pay less than typical in-person fees (26.6% of all responses) and those willing to pay a fee comparable to in-person fees for such events (5.3%). 13.3% of respondents didn't know if they'd view online events. See Table 2

Table 2: Willingness to watch a streamed version of a live event (n = 503)

Willingness to watch a streamed version of a live Event	Share of respondents
Yes, only if it was free	20.0%
Yes, even if there was a charge of less than the typical in-person fees for cultural events I have attended	26.6%
Yes, even if the charges were comparable to in-person fees for cultural events I have attended	5.3%
No, I would not be interested in watching a streamed/online live event	33.3%
Don't know	13.3%

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