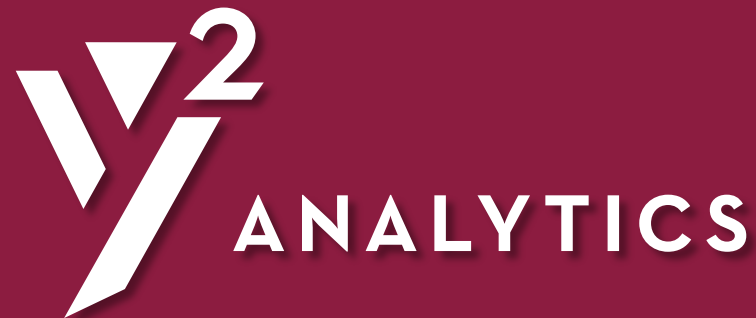




SALT LAKE COUNTY
SPRING 2020 CONSUMER SENTIMENT SURVEY



SURVEY METHODOLOGY

SAMPLING, MODE, & MARGIN OF ERROR

- For this survey, 800 Salt Lake County residents were sampled via Random Digit Dialing (RDD). Completed surveys were conducted via live dial telephone interviews. The data include 400 interviews completed via cell phone numbers.
- The data were weighted to reflect U.S. Census estimates of Salt Lake County demographic composition from the American Community Survey. Weights were used to ensure that the data reflected the population of Salt Lake County, specifically in regards to age, gender, ethnicity, and income.
- Live telephone interviews were conducted May 8-16, 2020.
- The margin of error for a survey with 800 responses is approximately ± 3.46 percentage points.



- 1 The vast majority of respondents (70%) are concerned that leaders will lift restrictions on public activity too quickly, as opposed to not quickly enough. Interestingly, just over half say they are more concerned about the effects of the virus on the economy as opposed to public health.
- 2 In recent weeks, leisure activities such as hair cuts, going to the gym, and entertainment events are significantly less common than activities that could be considered "essential" like grocery shopping and ordering takeout.
- 3 In general, high-income residents are slightly more comfortable participating in commercial activities such as shopping, eating out, being in public areas, etc. than lower-income residents.
- 4 Those concerned about the economy are much more comfortable participating in commercial activities than are those who report being more concerned about the public health impact of COVID-19.
- 5 Residents report that they are most likely to visit businesses that are following local health and safety guidelines.
- 6 When it comes to customer safety measures, residents feel most comfortable engaging with businesses that regularly sanitize surfaces and provide hand sanitizing stations. This is especially true among those that are concerned that restrictions could be lifted too quickly.

THINGS TO REMEMBER

COVID-19 IMPACT

PERSONAL AND COMMUNITY EFFECTS

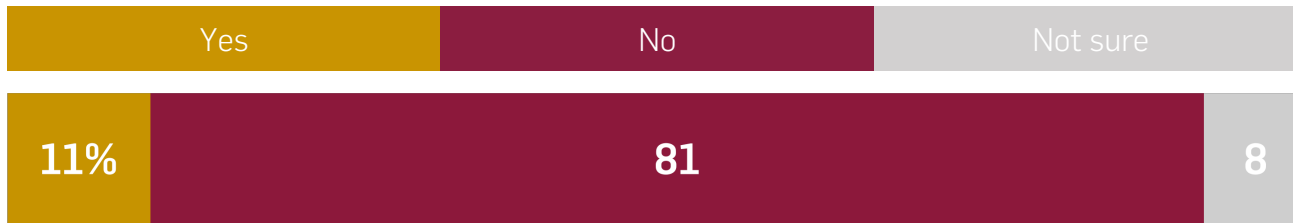
MAJORITY AFFECTED BY COVID

The vast majority of respondents (81%) do not believe that someone in their household has ever had the coronavirus. Nonetheless, nearly 3-in-4 county residents feel as though the outbreak has changed their life in a major way.

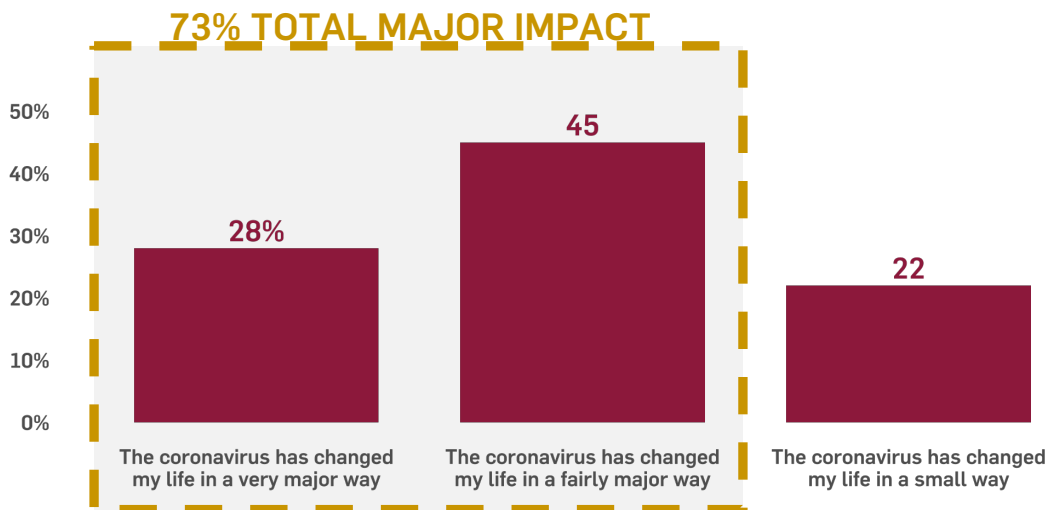
The majority of Salt Lake County residents (57%) believe that the worst of the coronavirus is yet to come. Comparatively, only 30% believe that the worst is behind us.



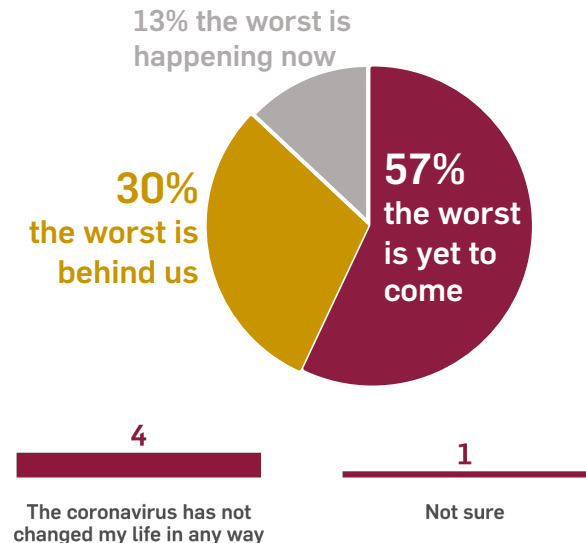
Do you believe that you or someone in your household may have had the coronavirus?



What, if any, impact has the coronavirus had on you and your family's day-to-day life?



Thinking about the problems Salt Lake County is facing from the coronavirus outbreak, do you think...



UNEMPLOYMENT INCREASES

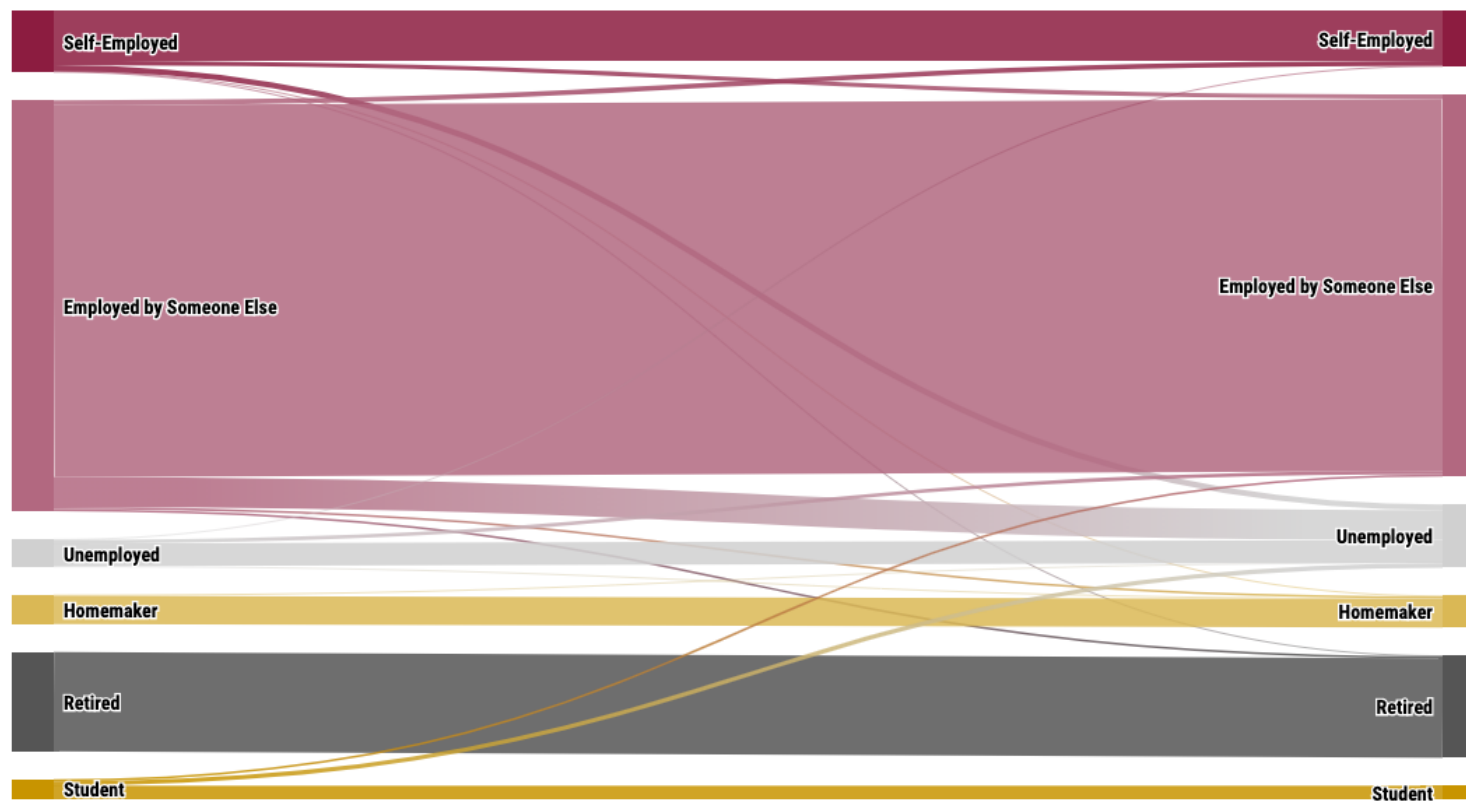
Since the onset of the coronavirus, employment status has remained unchanged for the vast majority of residents. However, unemployment has increased by 6 percentage points in the county since March 1. The newly unemployed include cohorts of those previously employed by someone else, those who were self employed, and former students.

Regardless of changes in employment status, **40% of county residents say their financial situation has been negatively affected by the outbreak.**



*What was your employment status as of March 1st (before the coronavirus restrictions went into place)?
And what was your employment status as of April 30th?*

Previous Employment to Current Employment Status Weighted Frequencies



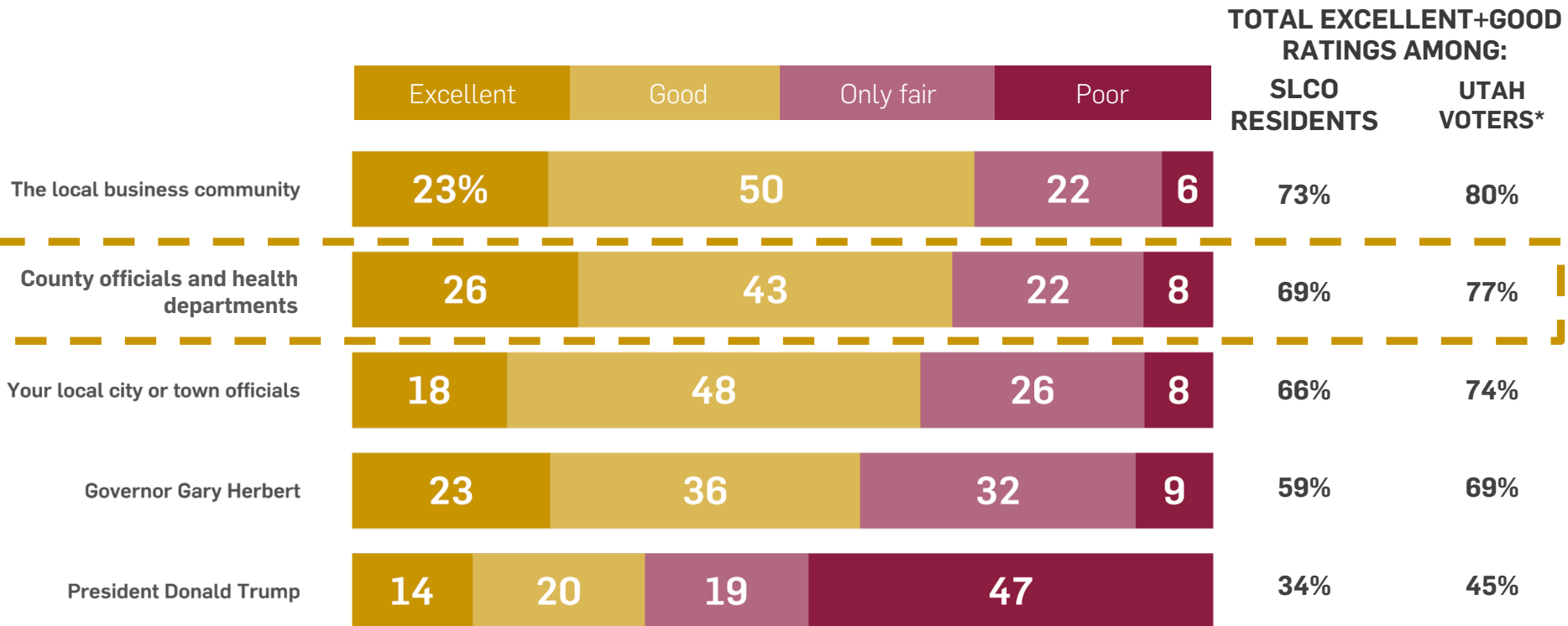
POLICY PERCEPTIONS

CURRENT APPROACH AND FUTURE CONCERNS

LOCAL INSTITUTIONS MORE TRUSTED

In general, county residents feel that the local business and government community is responding to COVID better than state- and national-level institutions and individuals. 2-out-of-3 SLCo residents give County officials a positive response rating. President Trump is the least favored actor, with 47% of respondents believing his response to the outbreak to be "poor." These attitudes were echoed in a recent statewide poll where again local business and government received the strongest positive response ratings.

Q How would you rate the job each of the following is doing responding to the coronavirus outbreak?



*Data included from a Utah Political Trends Panel survey of 1,099 likely Utah voters. Full results and methodology can be found at utpoliticaltrends.com/results

MAJORITY FEAR LIFTING RESTRICTIONS TOO SOON

The split between residents most concerned about the impact of coronavirus on public health and the impact on the economy is about even, with slightly more residents reporting that they are most concerned about the economy. Interestingly, 70% of residents are concerned that state and local leaders will lift restrictions too quickly, as opposed to not quickly enough.



Which of the following would you say is more concerning to you, personally?



Thinking about the decisions by the Utah State Government and Salt Lake County Health Department to impose significant restrictions on public activity because of the coronavirus outbreak, is your greater concern that state and local officials will...



LOW INCOME LESS CONCERNED ABOUT ECONOMY

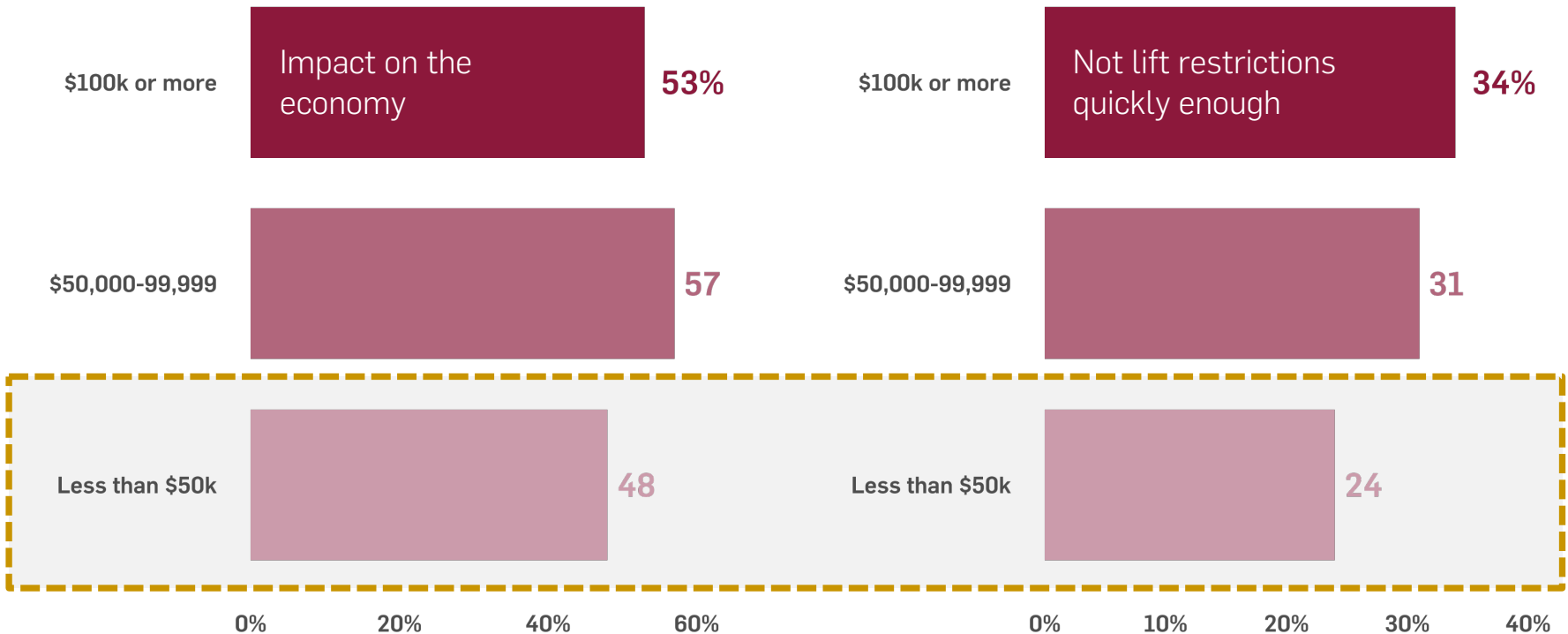
When comparing across income groups, higher income residents (>\$50,000) are slightly more likely than lower income residents (<\$50,000) to report being concerned about the impacts of coronavirus on the economy and about government officials not lifting restrictions quickly enough.



Which of the following would you say is more concerning to you, personally?



Thinking about the decisions by the Utah State Government and Salt Lake County Health Department to impose significant restrictions on public activity because of the coronavirus outbreak, is your greater concern that state and local officials will...



CONSUMER BEHAVIORS

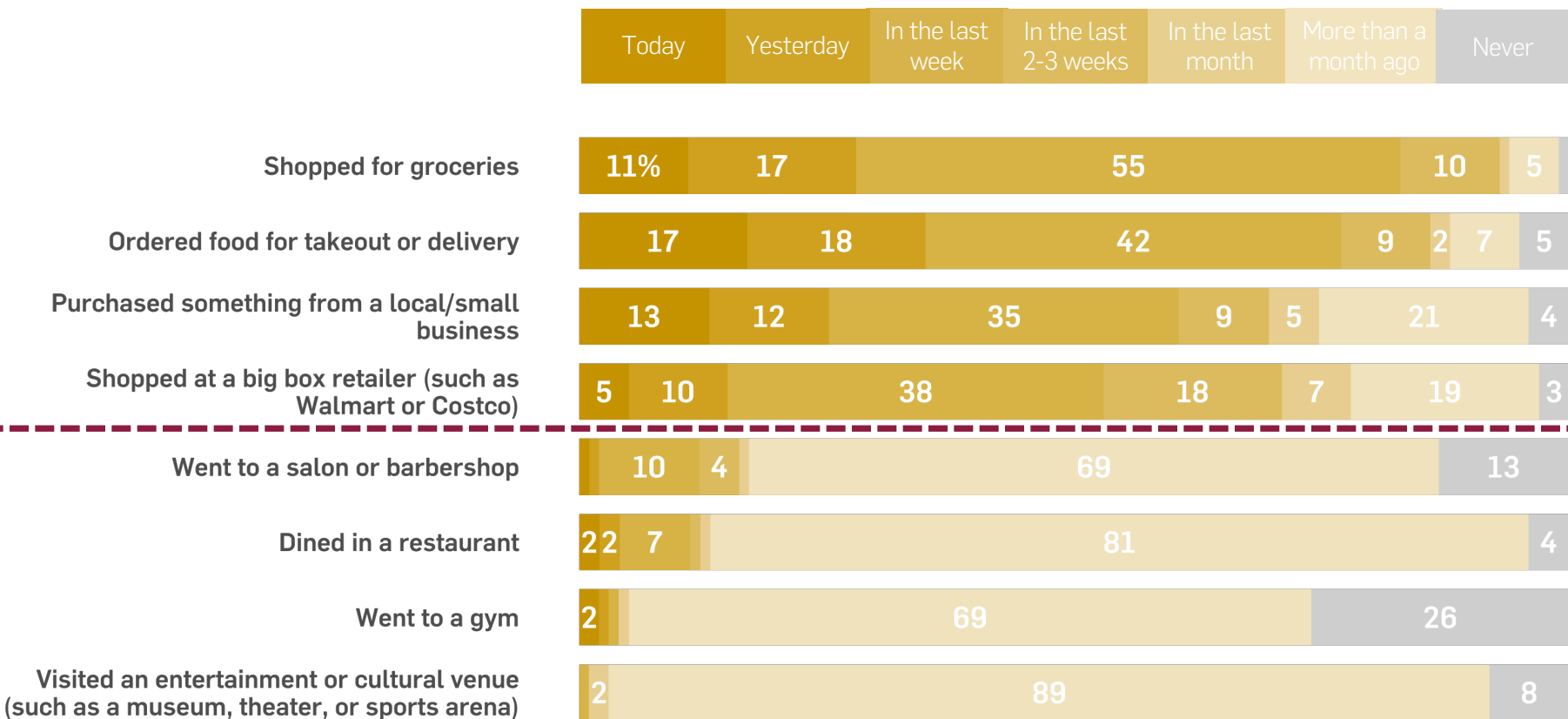
ENAGING IN THE ECONOMY & DESIRABLE PRECAUTIONS

LIMITED PARTICIPATION: LEISURE ACTIVITIES

While necessary activities such as grocery shopping are still very common among respondents, leisure activities such as restaurant dining, haircuts, and sports events are significantly less common. Whether it be by choice or due to restrictions, the vast majority of residents report participating in these activities over a month ago.



Thinking back, when was the last time you...?

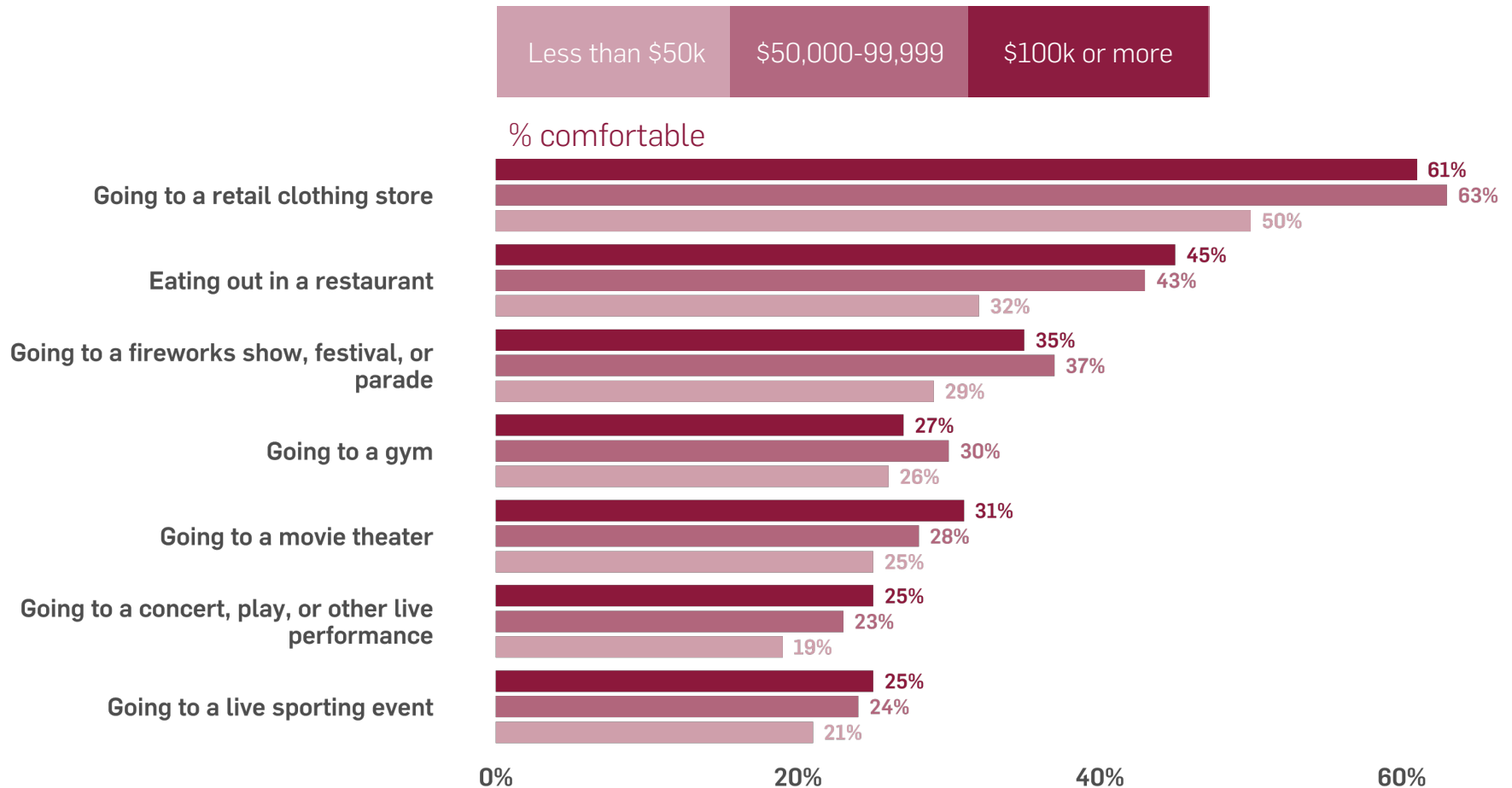


HIGH-INCOME RESIDENTS MOST COMFORTABLE

In general, higher income residents (>\$50,000) are more comfortable participating in commercial activities than lower income residents (<\$50,000). This is especially true for activities such as shopping for clothing, eating out in a restaurant, and going to community events like festivals or parades. Consumers of all income levels express hesitance to attend live events.



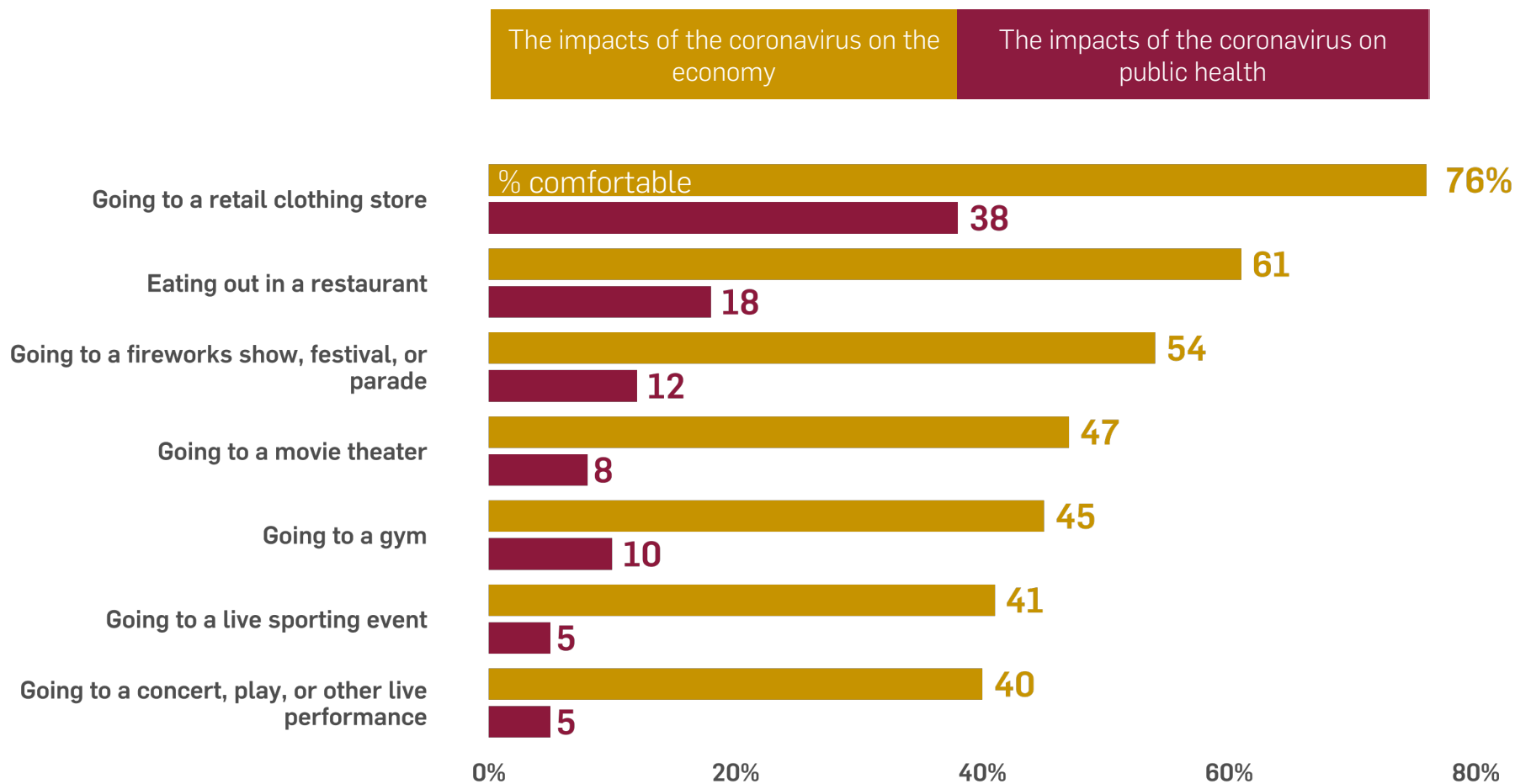
Regardless of current restrictions in your area, would you feel comfortable or uncomfortable [ITEM] at this time?



ECONOMICALLY CONCERNED WILLING TO SHOP

Those concerned about the impact the coronavirus will have on the economy are significantly more willing to shop and go to public events than those who are more concerned about the public health impacts.

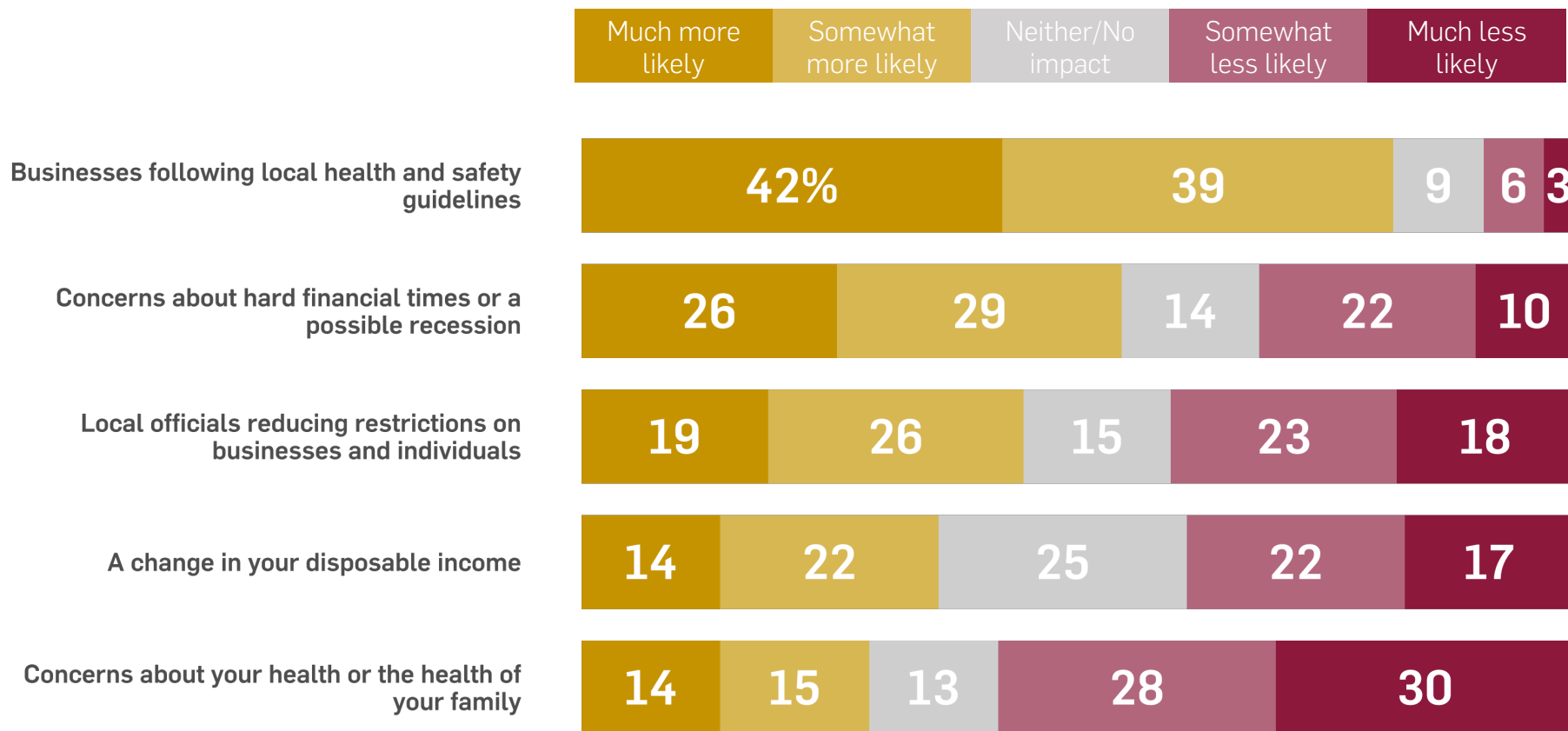
Q *Regardless of current restrictions in your area, would you feel comfortable or uncomfortable [ITEM] at this time?*



FOLLOWING GUIDELINES MOST APPEALING

The vast majority of residents (81%) say they would be more likely to visit local businesses if the business were to practice health and safety guidelines. The biggest deterrent from visiting local businesses are concerns about personal and family health.

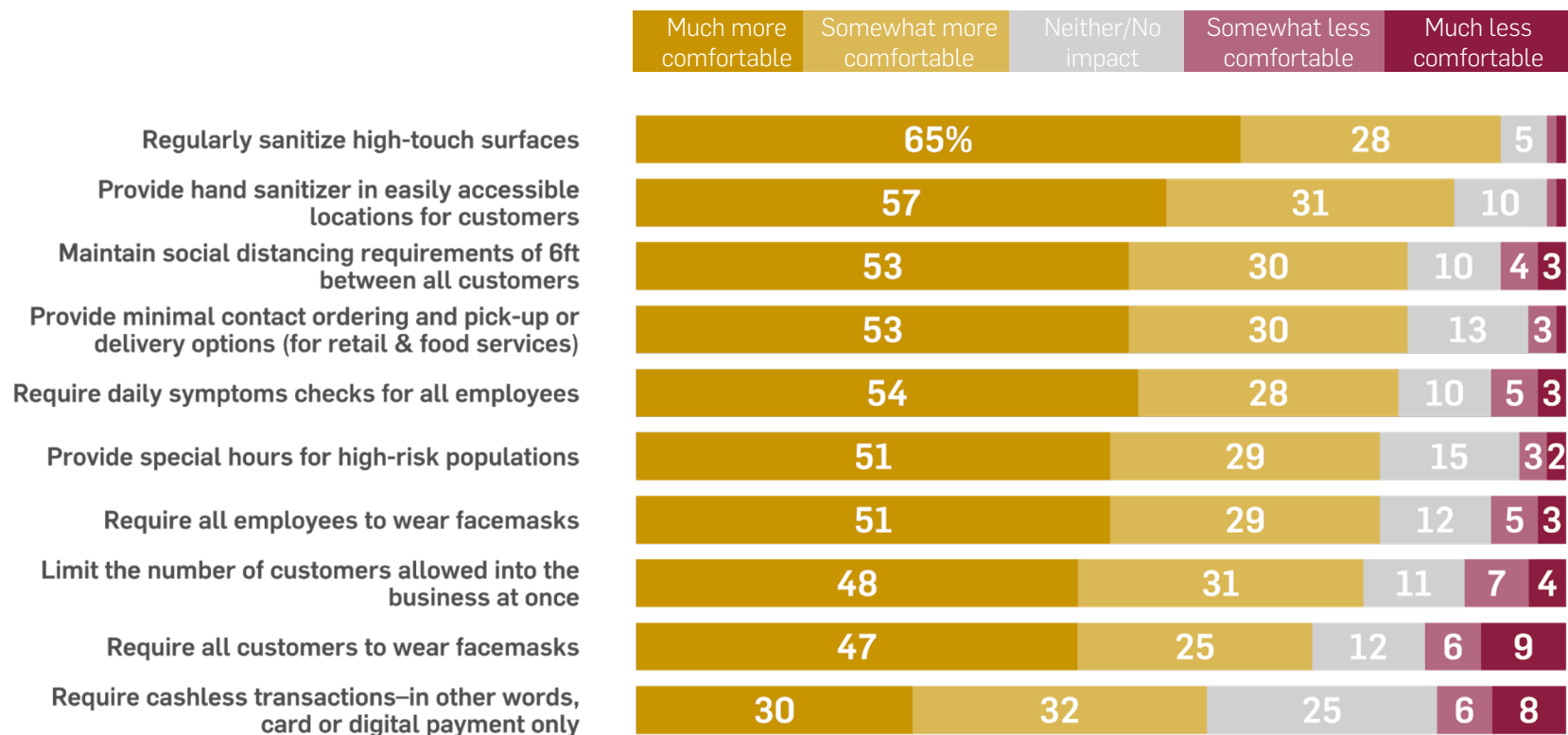
Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



CONSUMERS WANT SANITIZATION

While all safety measures are likely to increase consumer comfort, regularly sanitizing surfaces and providing hand sanitizing stations are the most likely measures to improve comfort in engaging with the economy. Requiring cashless transactions stands out as the least effective way of increasing consumer comfort.

Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would it make you more or less comfortable if various businesses were to...*





Kyrene Gibb & Kelly Patterson, Ph.D.
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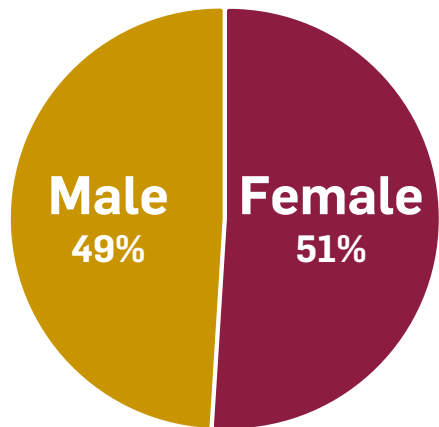
APPENDIX

FULL RESULTS & SUPPLEMENTAL ANALYSIS

DEMOGRAPHICS

Respondent demographic composition data have been weighted to reflect ACS Census Estimates. The split between male and female respondents is essentially even. 86% of respondents indicate that they are white, approximating the Salt Lake County census population estimates. Nearly 2/3 of respondents are married, and the majority (58%) have no children.

Gender



100%

86%

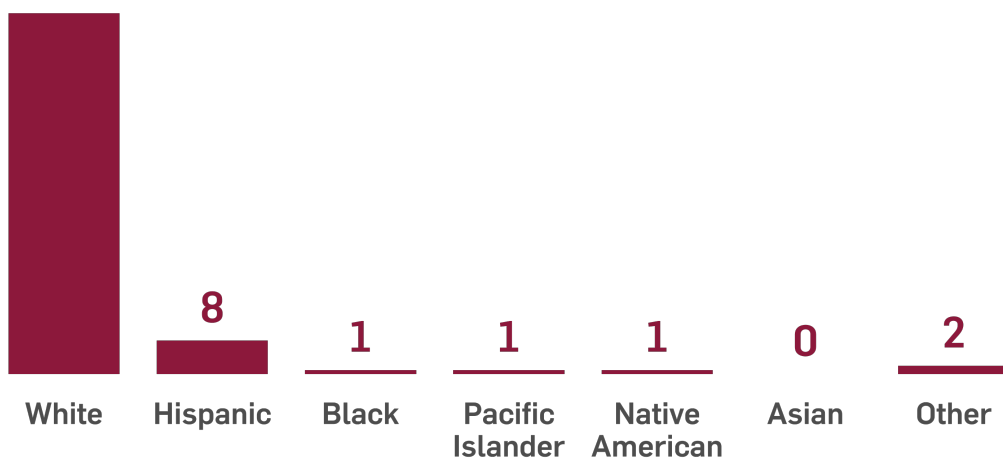
75%

50%

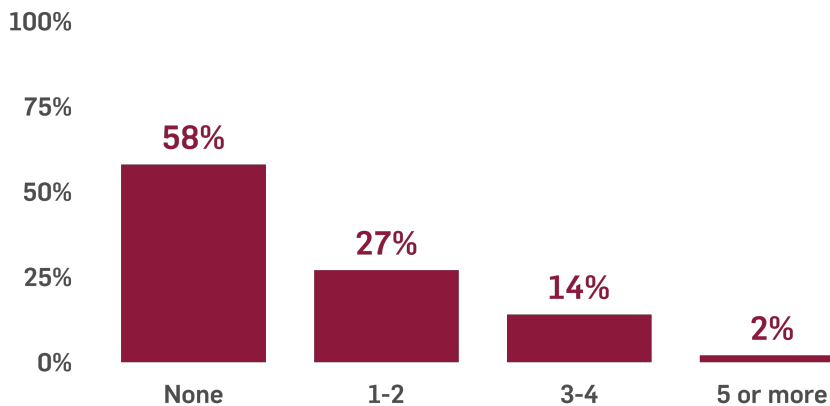
25%

0%

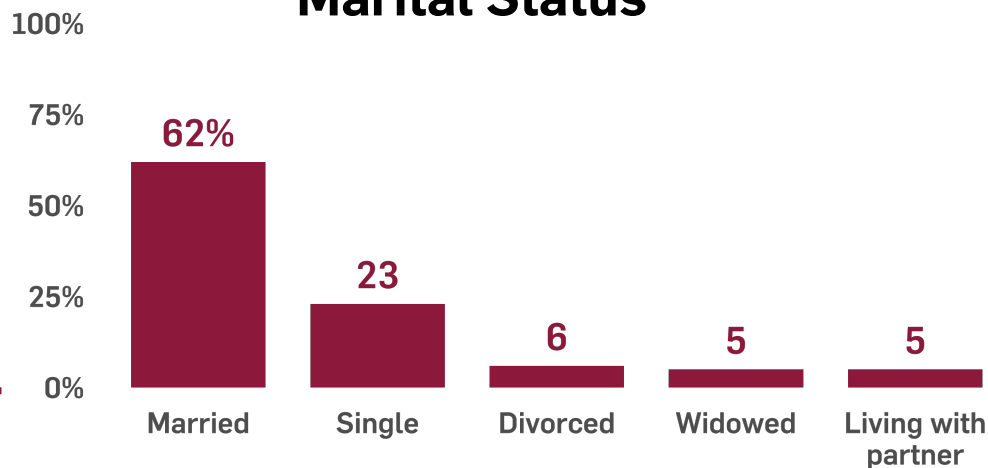
Race



Children



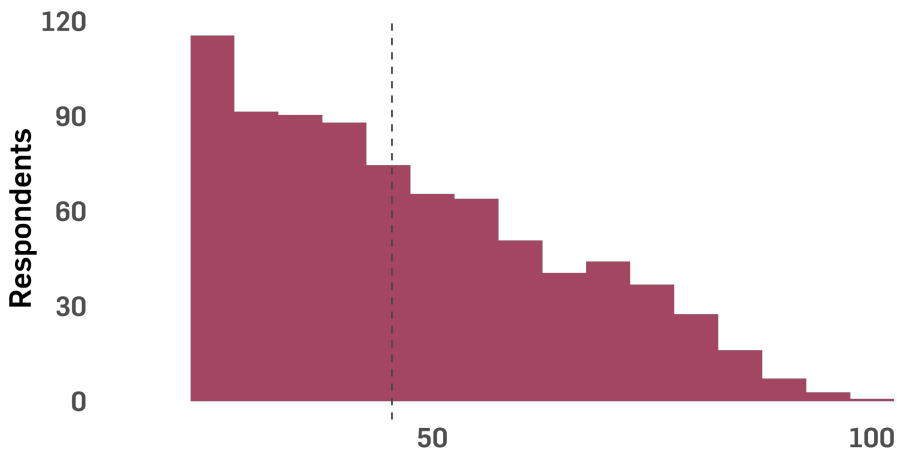
Marital Status



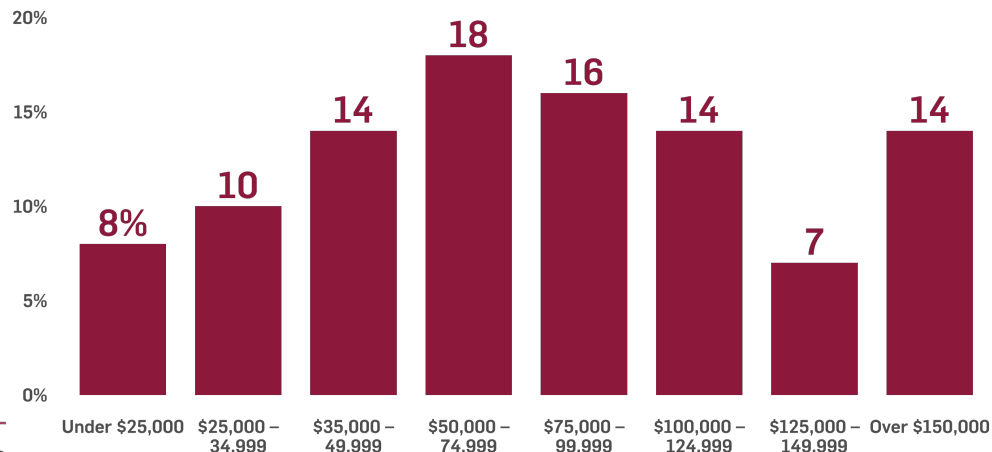
DEMOGRAPHICS

Respondents are distributed across all age groups, with an average age of 45. Most respondents are college-educated. The majority of respondents are employed, however, unemployment among respondents has increased 6 percentage points since the outbreak. Respondents are distributed across all income brackets.

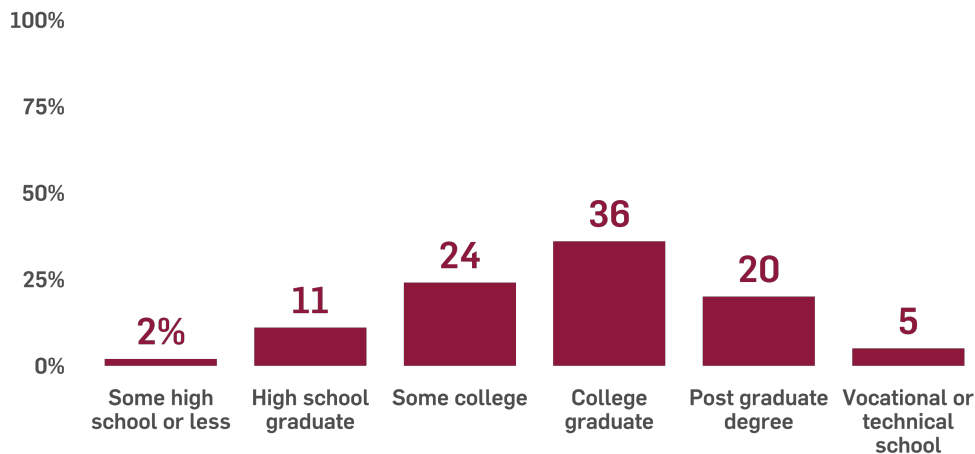
Age



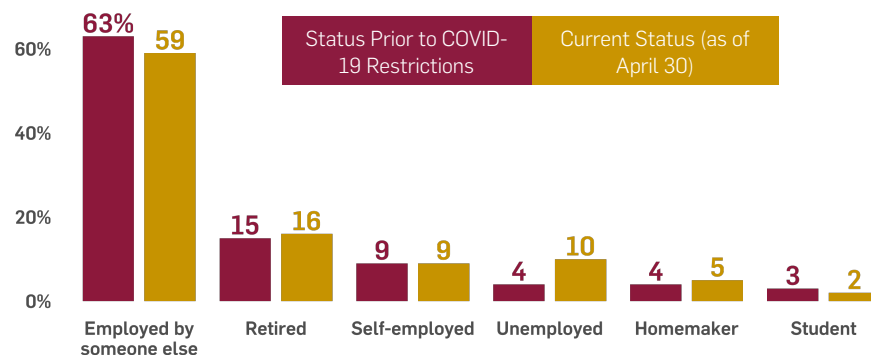
Income



Education



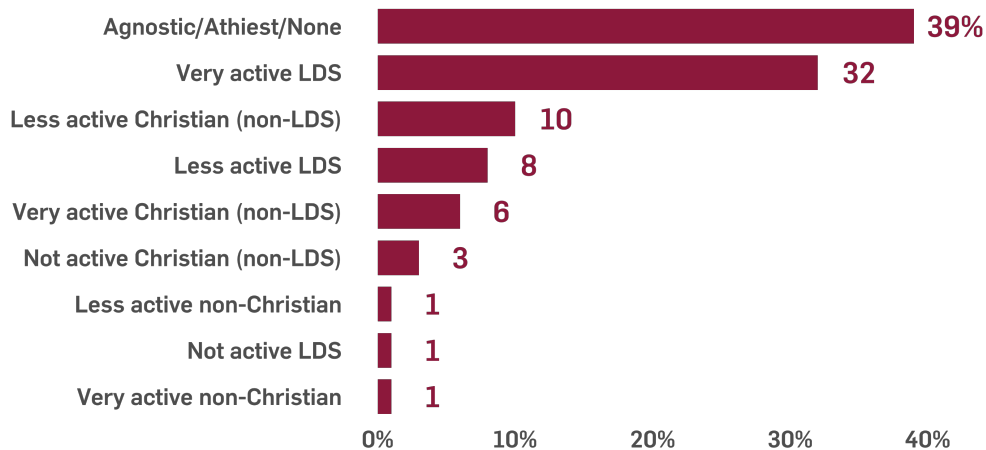
Employment



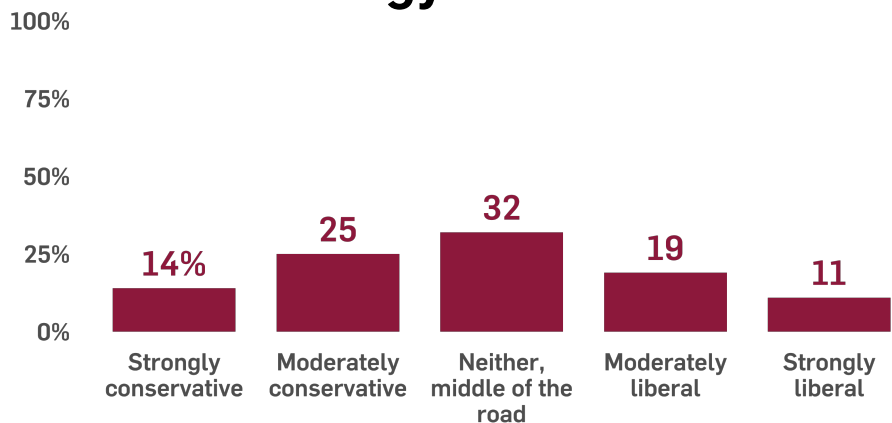
DEMOGRAPHICS

Political party identification is nearly evenly split among Republicans and Democrats, with only 4% more respondents identifying as Republican. A plurality of respondents consider themselves at least moderately conservative, aligning consistently with party identification. Most respondents are either of no religion or are LDS.

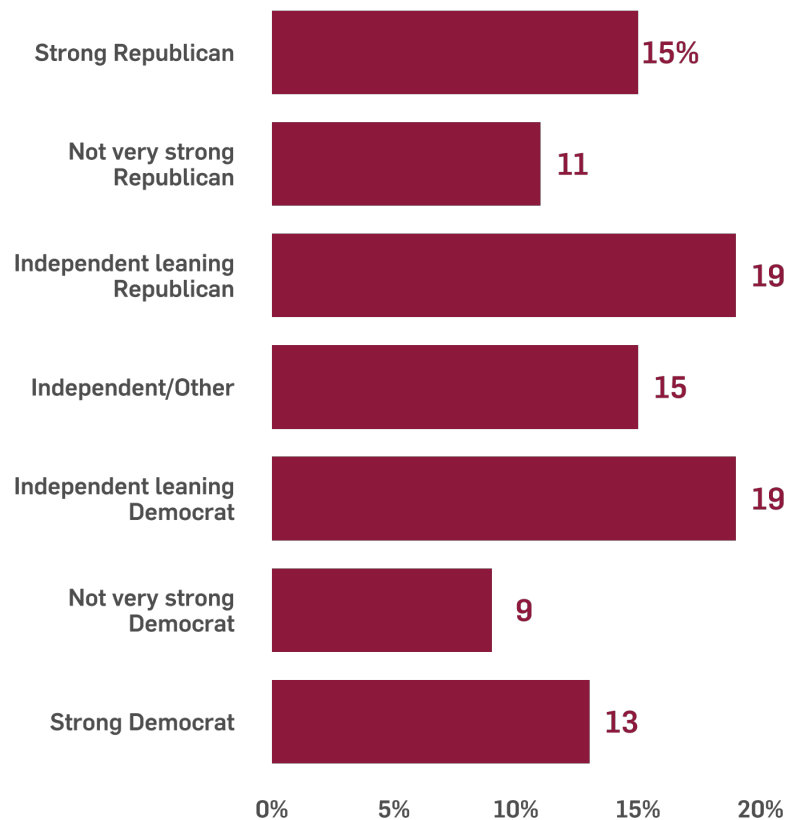
Religion



Ideology



Party



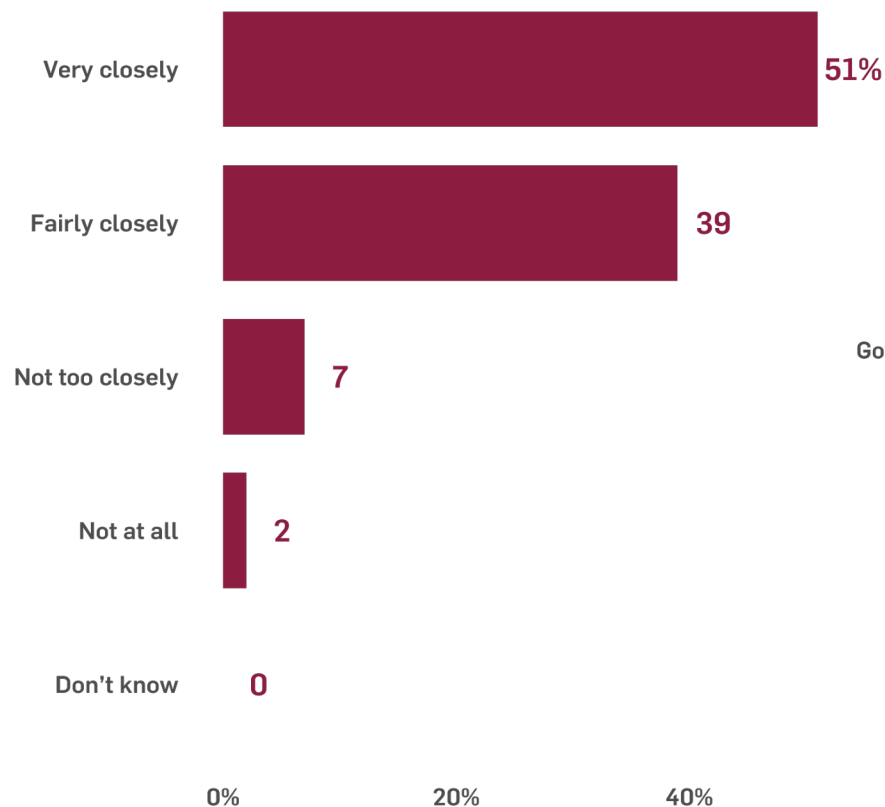
COVID-19 IMPACT

AWARENESS, PREVELANCE, & ANTICIPATED EFFECTS

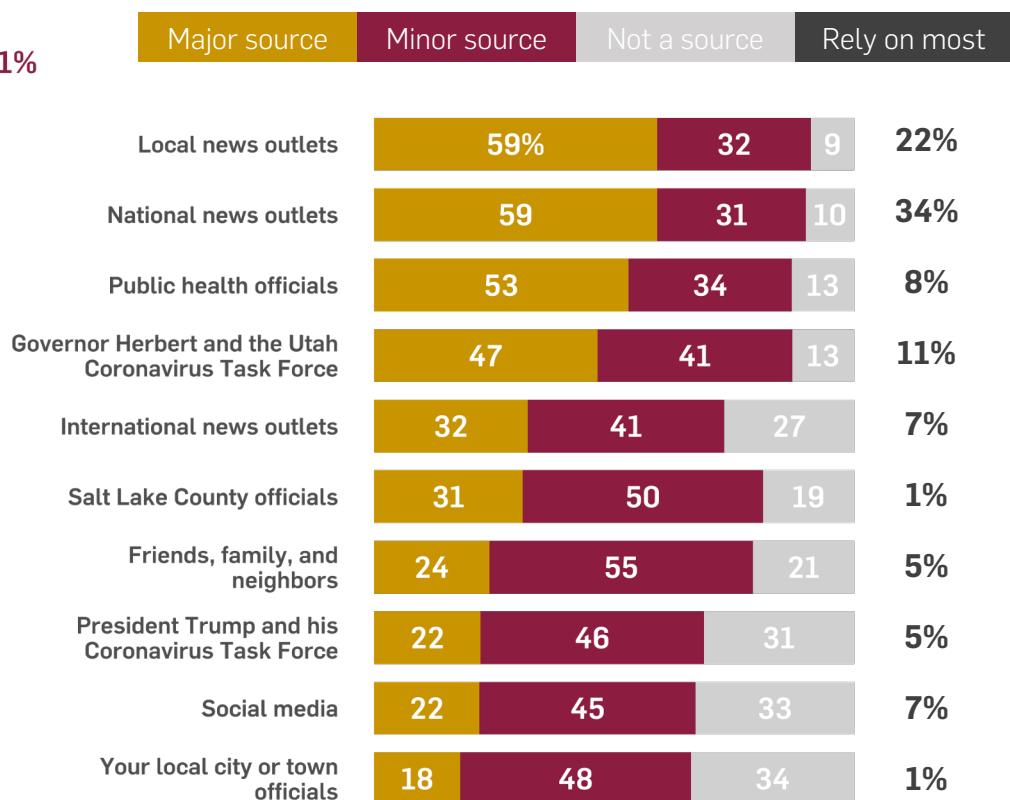
MAJORITY CLOSELY FOLLOWING COVID

90% of respondents are following the outbreak at least fairly closely, with most obtaining their news from local and national news outlets, including public health officials. Local officials are the least commonly used news source.

Q *How closely, if at all, have you been following the recent news about the COVID-19, or coronavirus, outbreak?*



Q *Please indicate whether each of the following is a source of news for you about the coronavirus outbreak. And which of these sources do you RELY ON MOST for news about the coronavirus outbreak?*

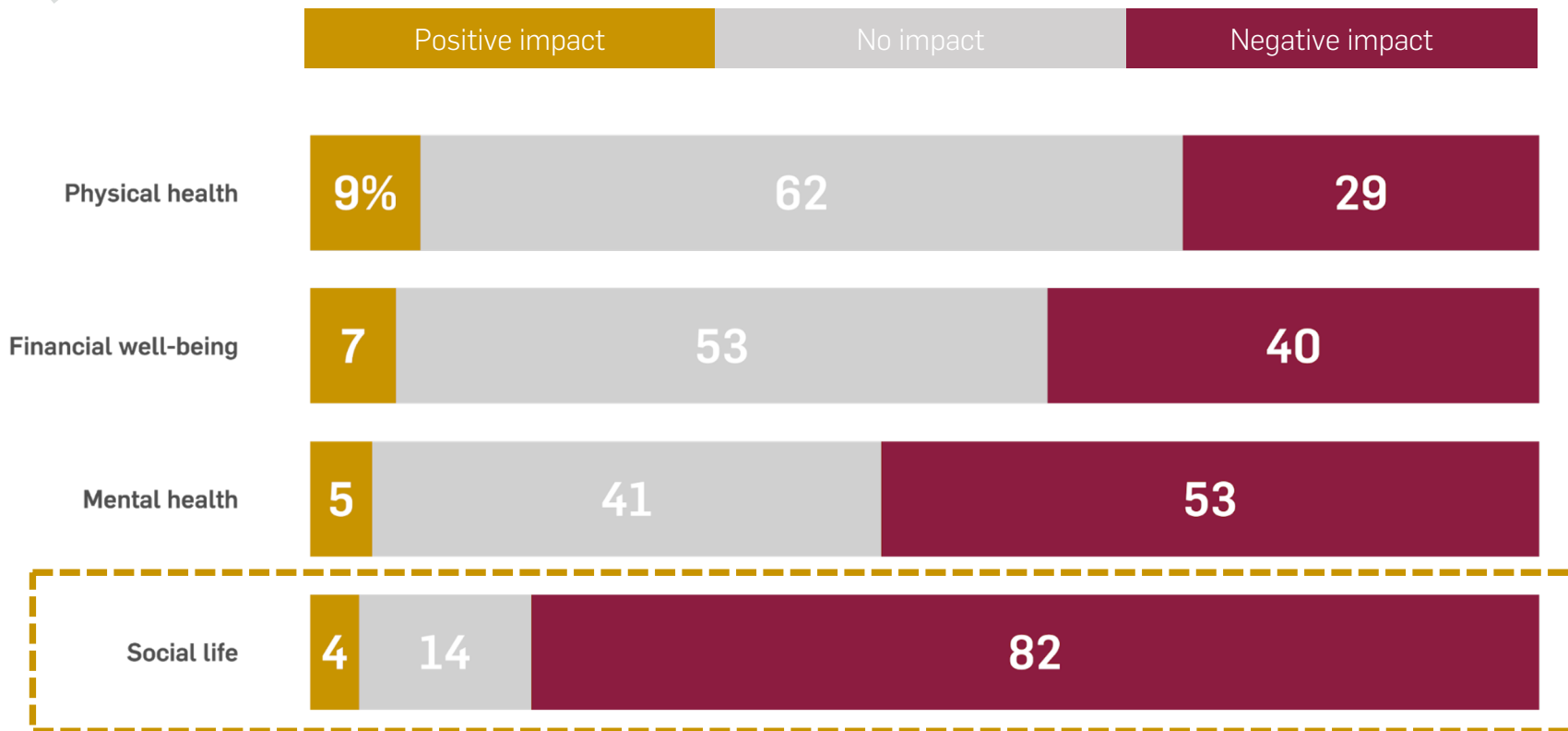


COVID IMPACTS ON MENTAL HEALTH, SOCIAL LIFE ESPECIALLY STARK

While most county residents report that their physical health has been largely unaffected by the outbreak, 53% of respondents feel as though their mental health has been negatively impacted. Social life is the area most negatively impacted by the coronavirus, with 82% of residents reporting that the coronavirus has had a negative impact on their social life.



Would you say that the coronavirus has had a positive impact, a positive impact, or no impact on your...



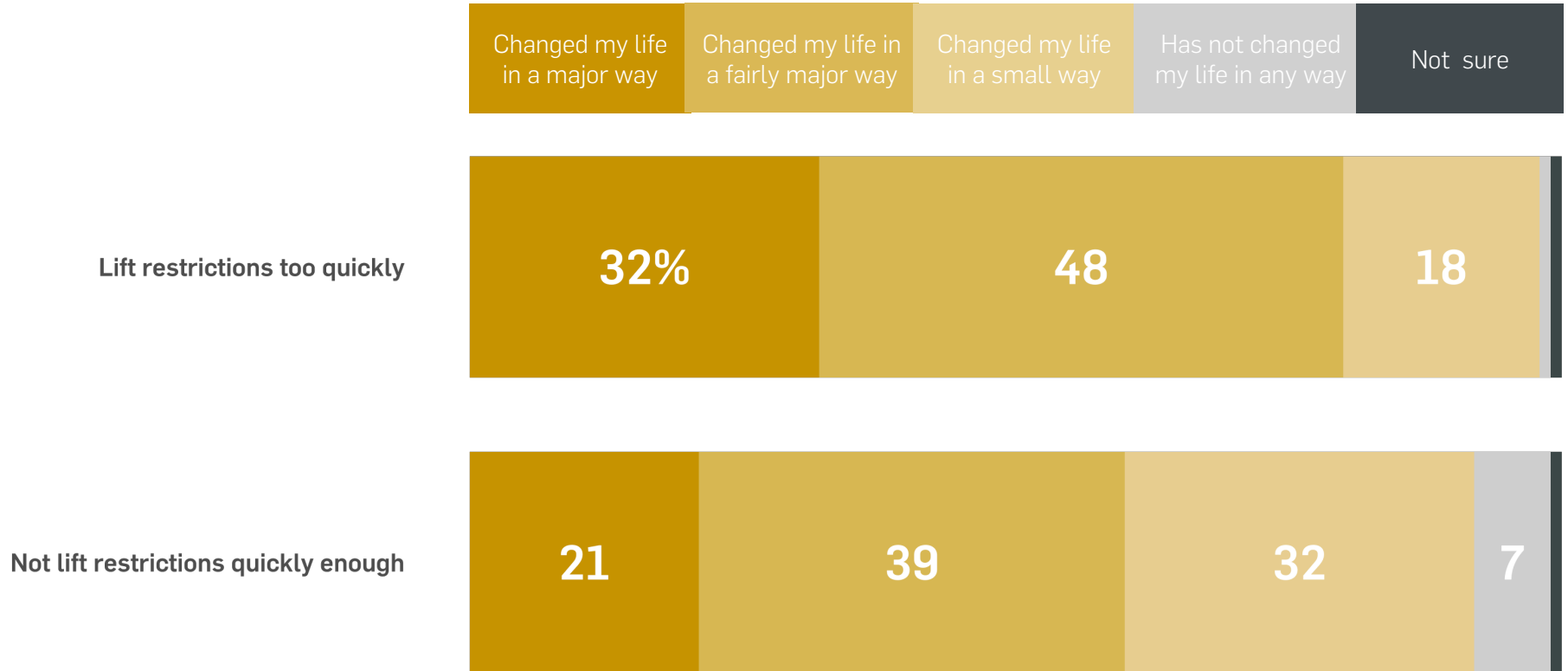
MOST IMPACTED ARE MOST HESITANT

Respondents that are concerned that local leaders will lift restrictions too quickly are more likely to report that coronavirus has changed their life in a major or fairly major way than are those concerned that restrictions will not be lifted quickly enough.



Thinking about the decisions by the Utah State Government and Salt Lake County Health Department to impose significant restrictions on public activity because of the coronavirus outbreak, is your greater concern that state and local officials will...

What, if any, impact has the coronavirus had on you and your family's day-to-day life?

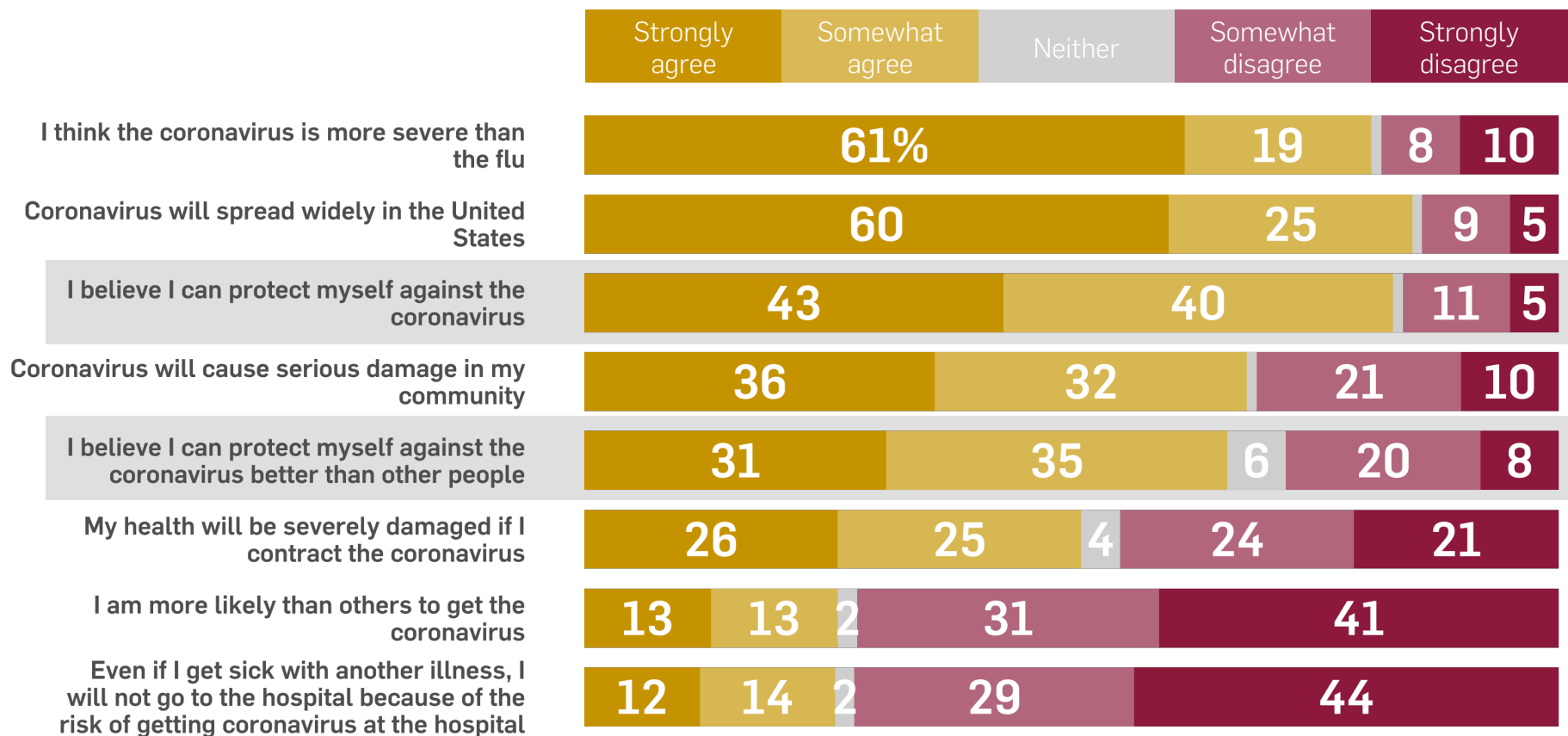


LOW PERCEIVED RISK OF CONTRACTING COVID

While the majority of residents believe the coronavirus is a genuine threat (more severe than the flu, will spread in the US, and will cause serious damage in the community), many do not see it as a threat to them personally. 72% do not believe that they are at high risk of contracting the disease compared to others, and 83% believe that they can protect themselves against the virus.



Next I'm going to read you a few statements that represent different views about the coronavirus. Please tell me whether you agree or disagree with each of the following statements as they apply to you, personally. [PROBE: and would you say you agree/disagree strongly, or just somewhat?]



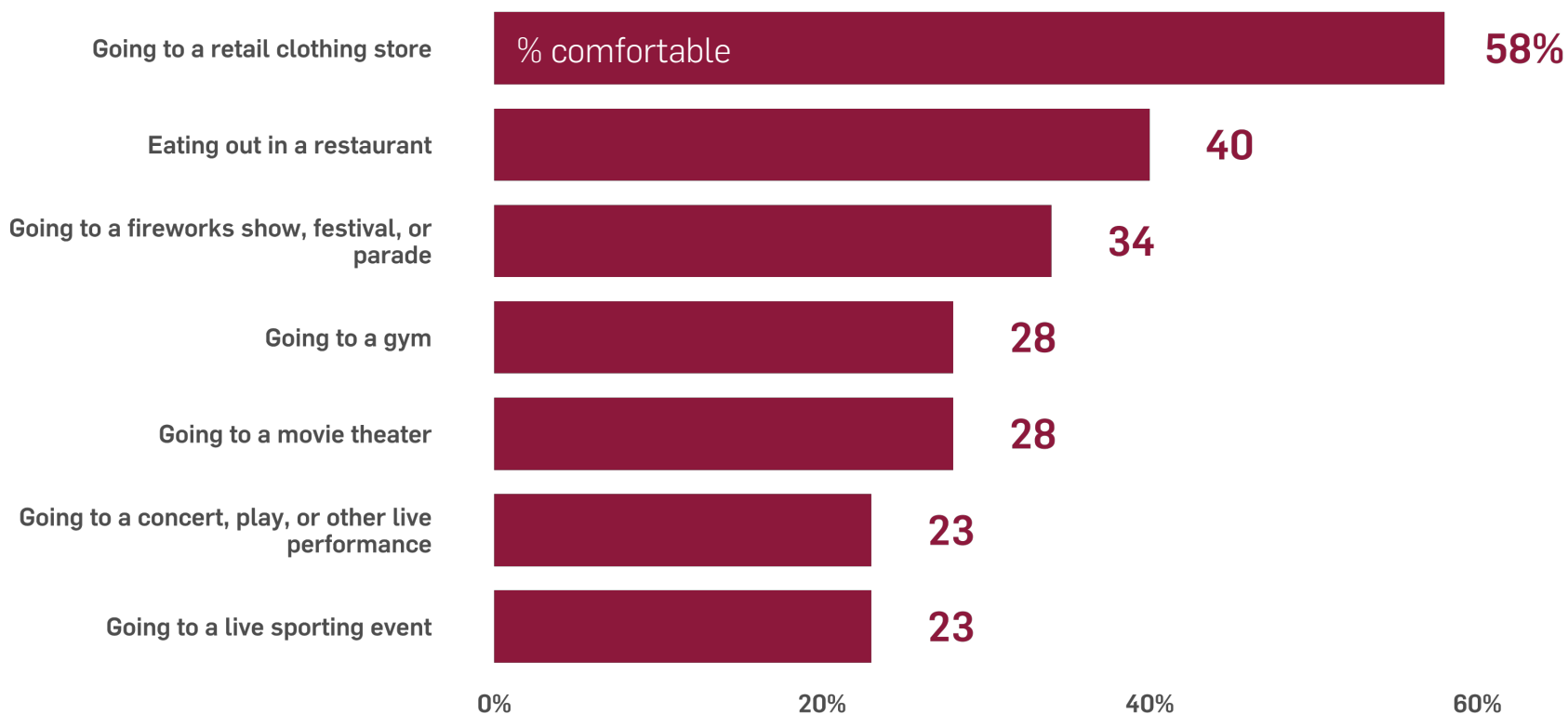
CONSUMER BEHAVIORS

SHOPPING, DINING, AND COMMERCIAL ACTIVITIES

MOST COMFORTABLE: CLOTHING RETAILERS

The majority of respondents (58%) say they would feel comfortable going to a retail clothing store. By comparison, less than a quarter of respondents would feel comfortable attending a live performance or sporting event.

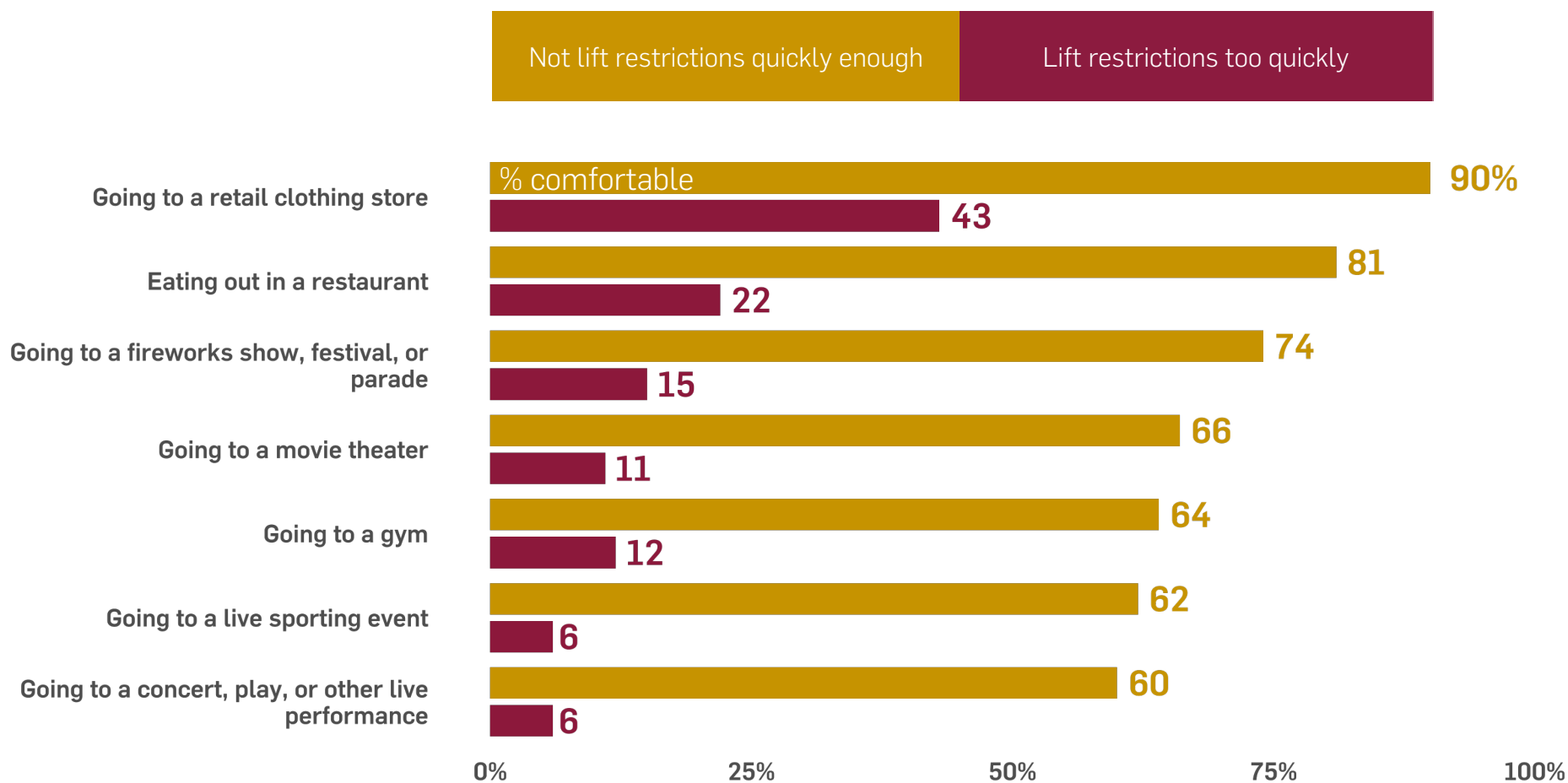
Q *Regardless of current restrictions in your area, would you feel comfortable or uncomfortable [ITEM] at this time?*



THOSE IN FAVOR OF LIFTING RESTRICTIONS READY TO SHOP

Those concerned that the restrictions will not be lifted quickly enough are significantly more comfortable with shopping and going to public events than are those who worry that restrictions will be lifted too quickly.

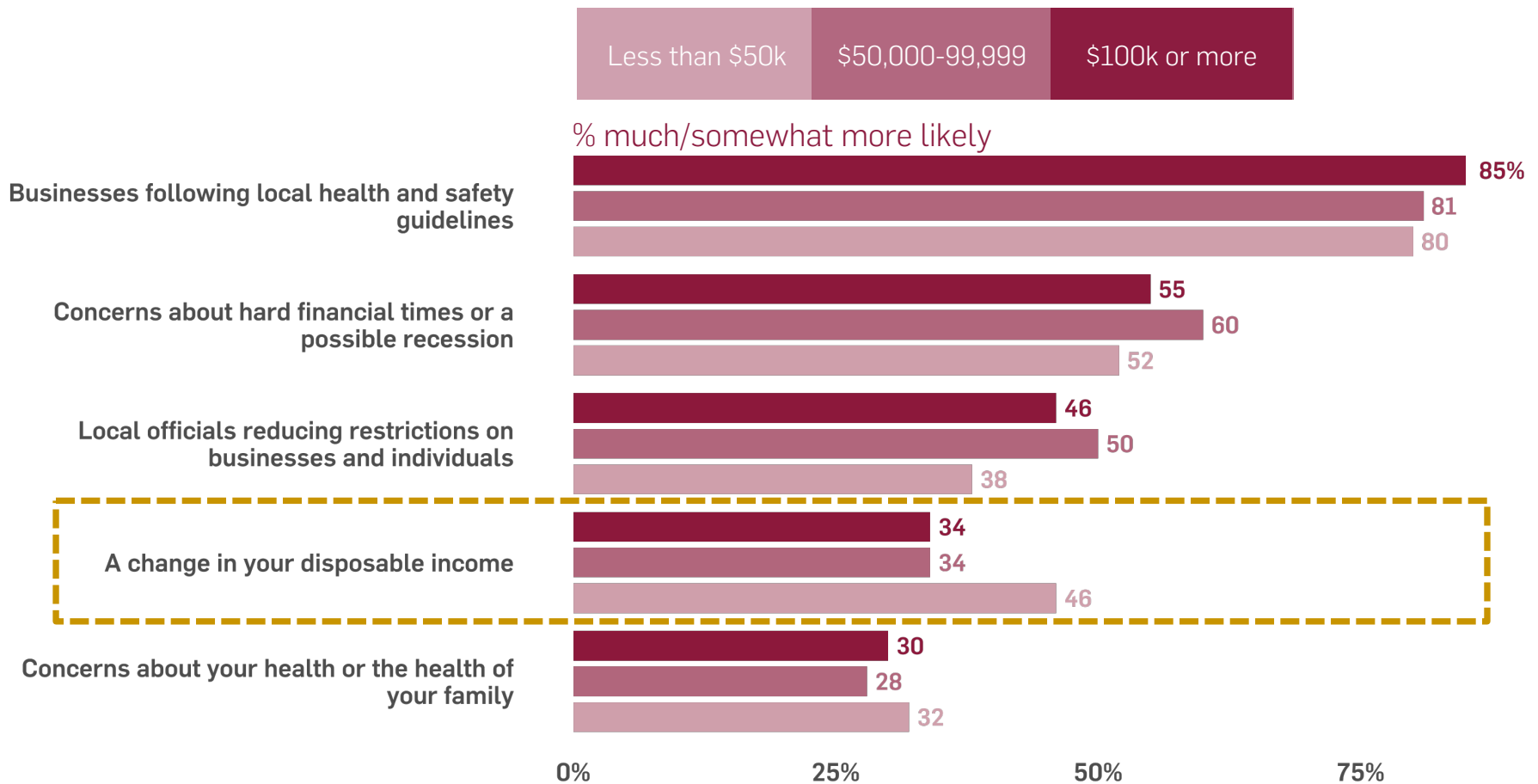
Q *Regardless of current restrictions in your area, would you feel comfortable or uncomfortable [ITEM] at this time?*



DISPOSABLE INCOME MOTIVATES LOWER INCOME

Ensuring that businesses are following health and safety guidelines makes individuals of all income levels more likely to visit a local business. Compared to higher income residents, lower-income residents are significantly more likely to visit local businesses if there were a change in their disposable income.

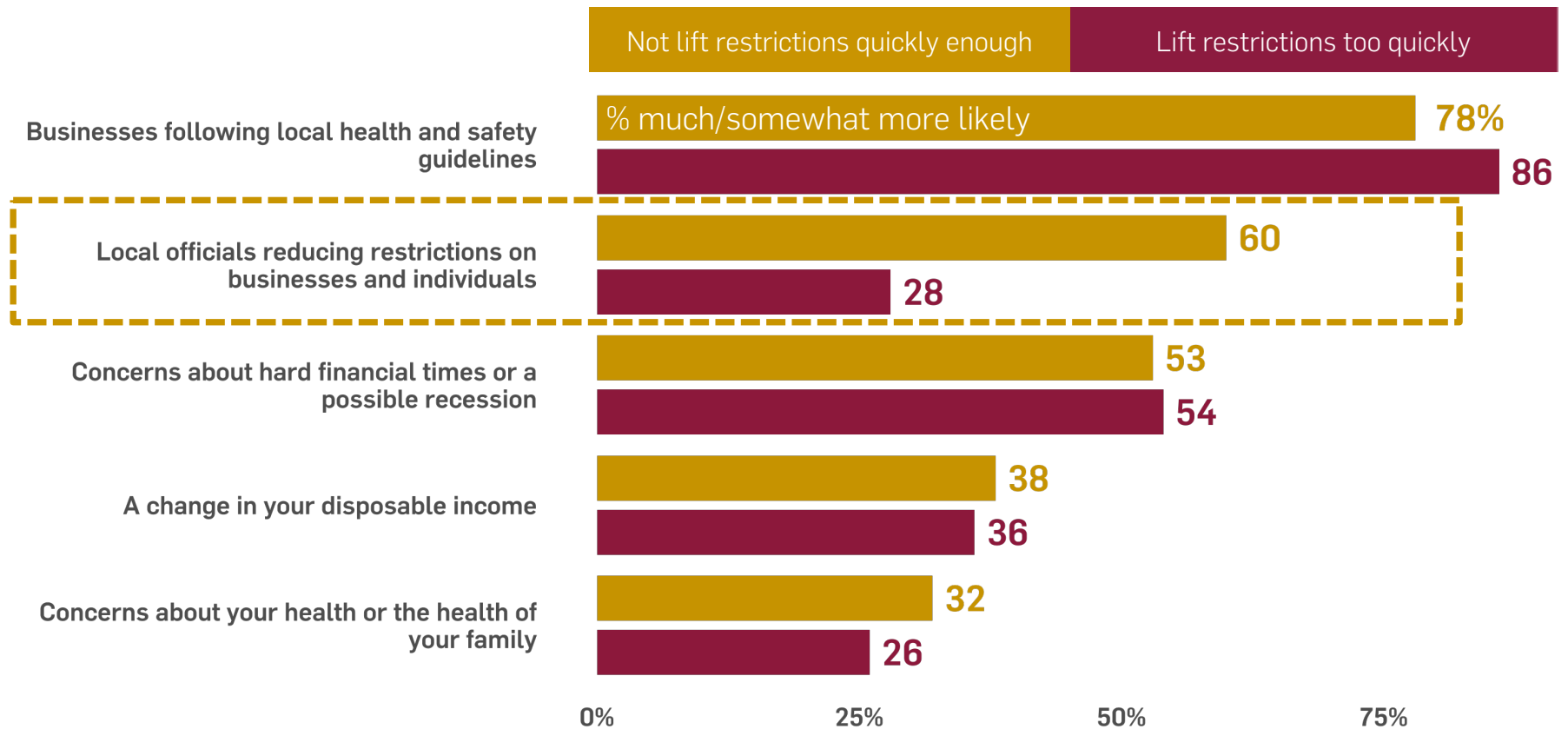
Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



RESIDENTS DIVIDED OVER RESTRICTION REDUCTION

While 60% of those who are concerned that restrictions won't be lifted soon enough say they would be more likely to shop if local officials reduced restrictions, only 28% of those hesitant to lift restrictions say the same. More than three-quarters of respondents from both groups would be comfortable visiting businesses following local health and safety guidelines.

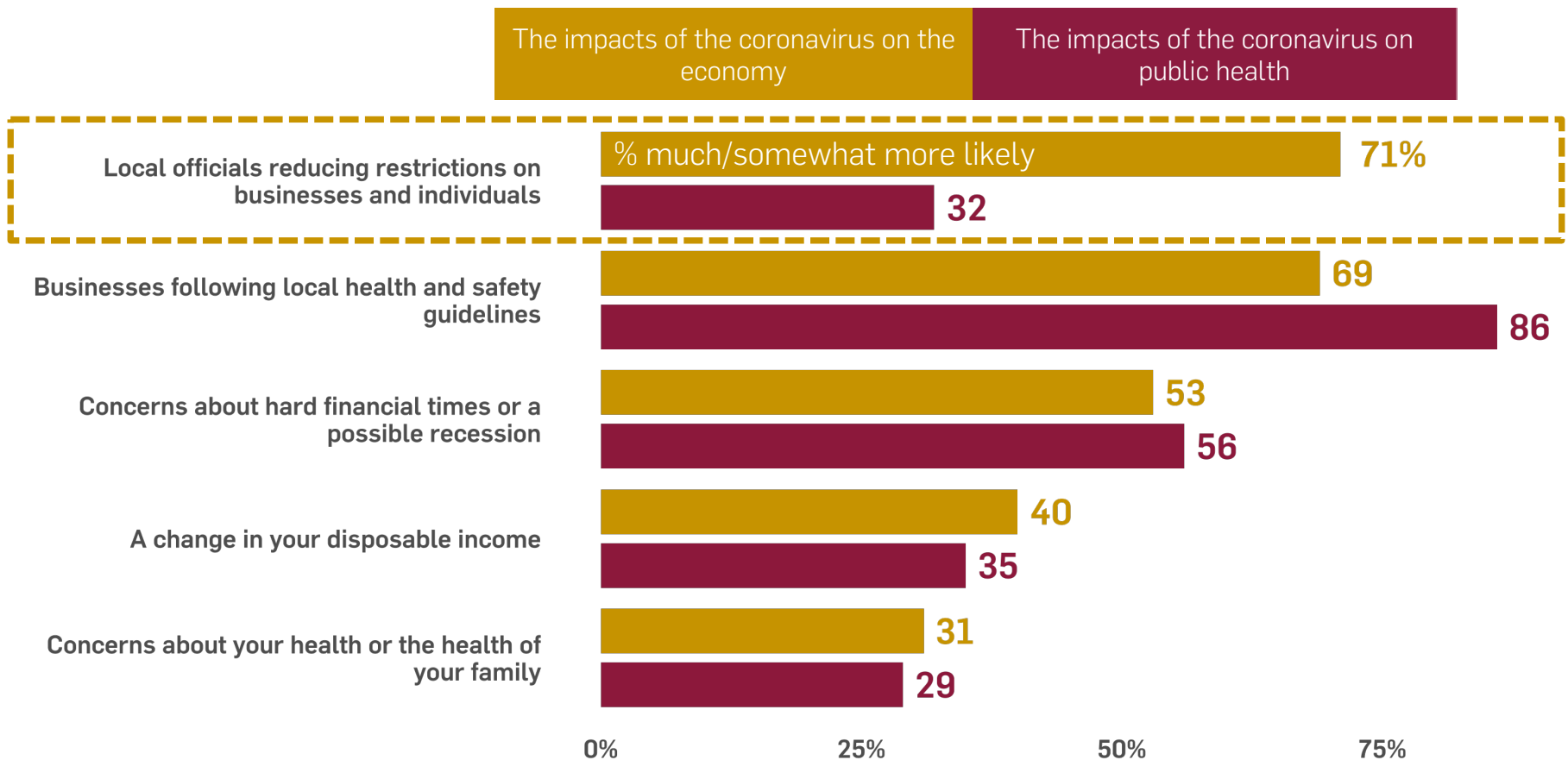
Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



ECONOMICALLY AWARE LOOK TO LOCAL OFFICIALS

Residents more concerned with the impact of COVID-19 on the economy than on public health are far more likely to visit businesses when local officials lift restrictions than are those concerned about public health. Health concerned residents, on the other hand, are more likely to respond positively to businesses following safety guidelines.

Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



EFFECTIVE MEASURES DO NOT VARY BY INCOME

Across all income levels, county residents respond similarly to potential safety measures. There are no significant differences in anticipated effectiveness or increased comfort across income levels.



Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would it make you more or less comfortable if various businesses were to...

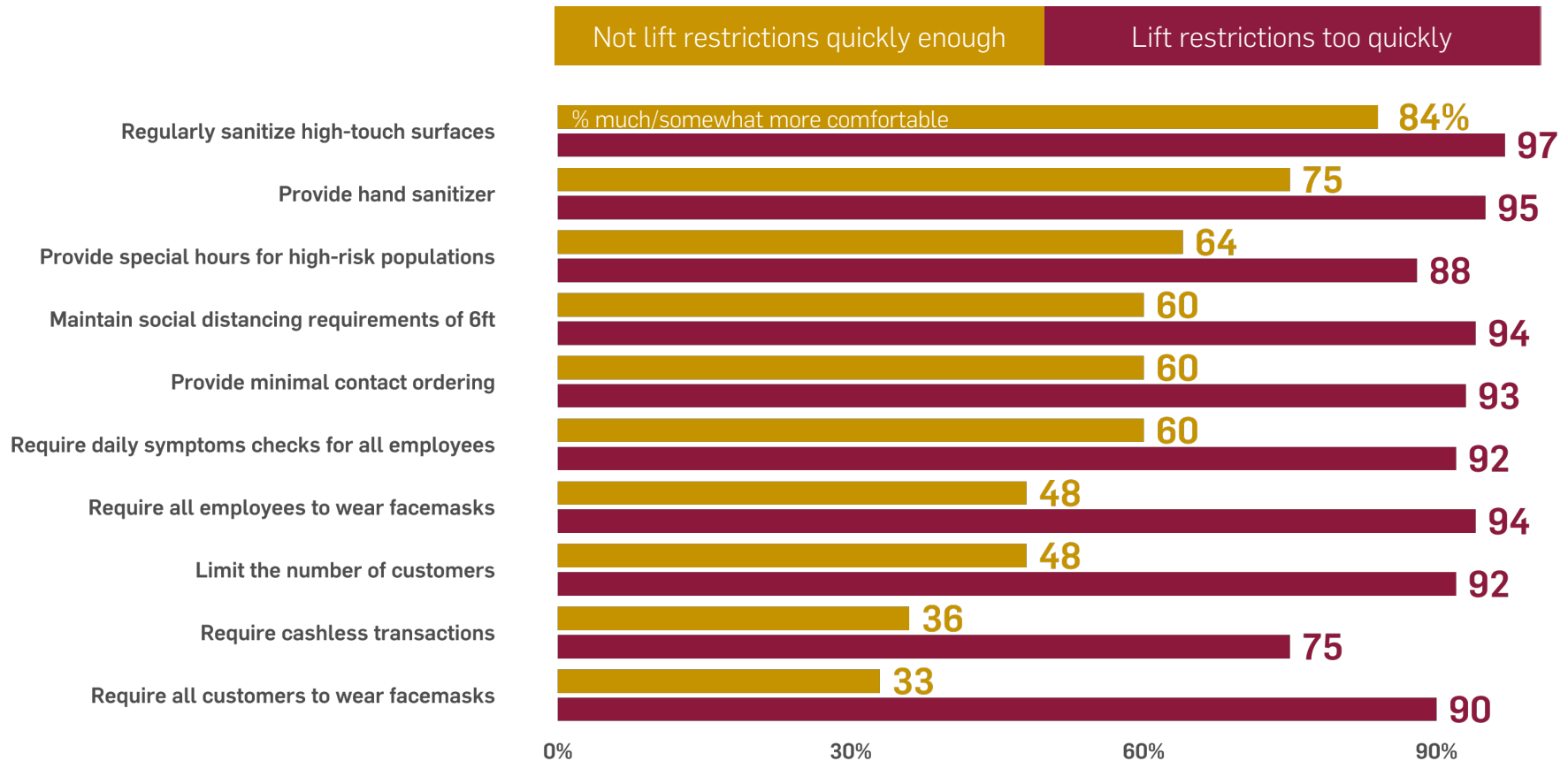


SAFETY MEASURES KEY TO HESITANT RESIDENTS

Those concerned that the restrictions will be lifted too quickly are much more comfortable visiting local businesses that implement any/all safety measures than those that are concerned that the restrictions will not be lifted quickly enough.



Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would it make you more or less comfortable if various businesses were to...

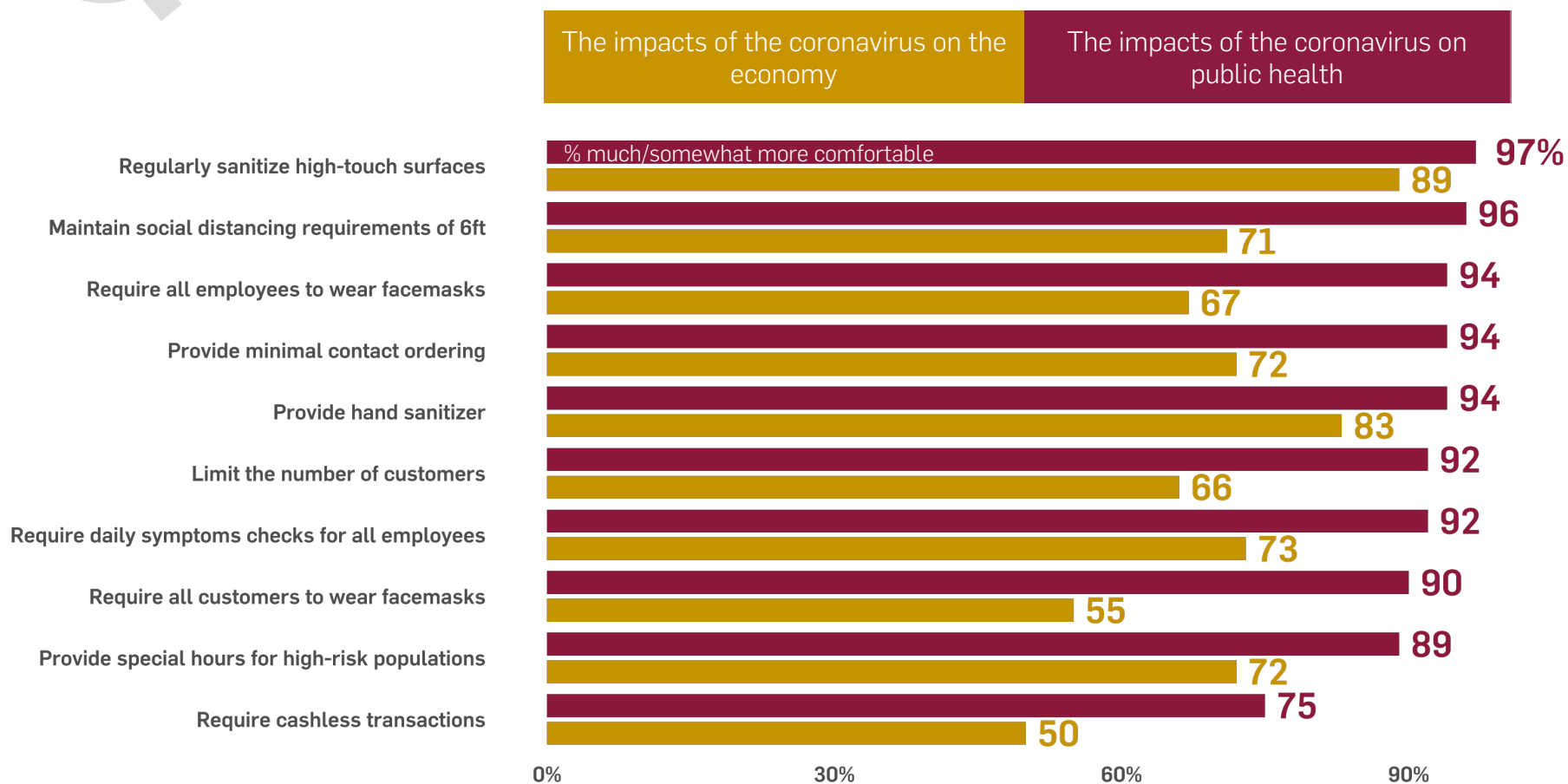


HEALTH CONCERNED SUPPORT PRECAUTIONS

Those concerned with the effect that the coronavirus will have on public health are more comfortable with health and safety measures than those who are concerned with the effect on the economy.



QACCOMS. Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would it make you more or less comfortable if various businesses were to...

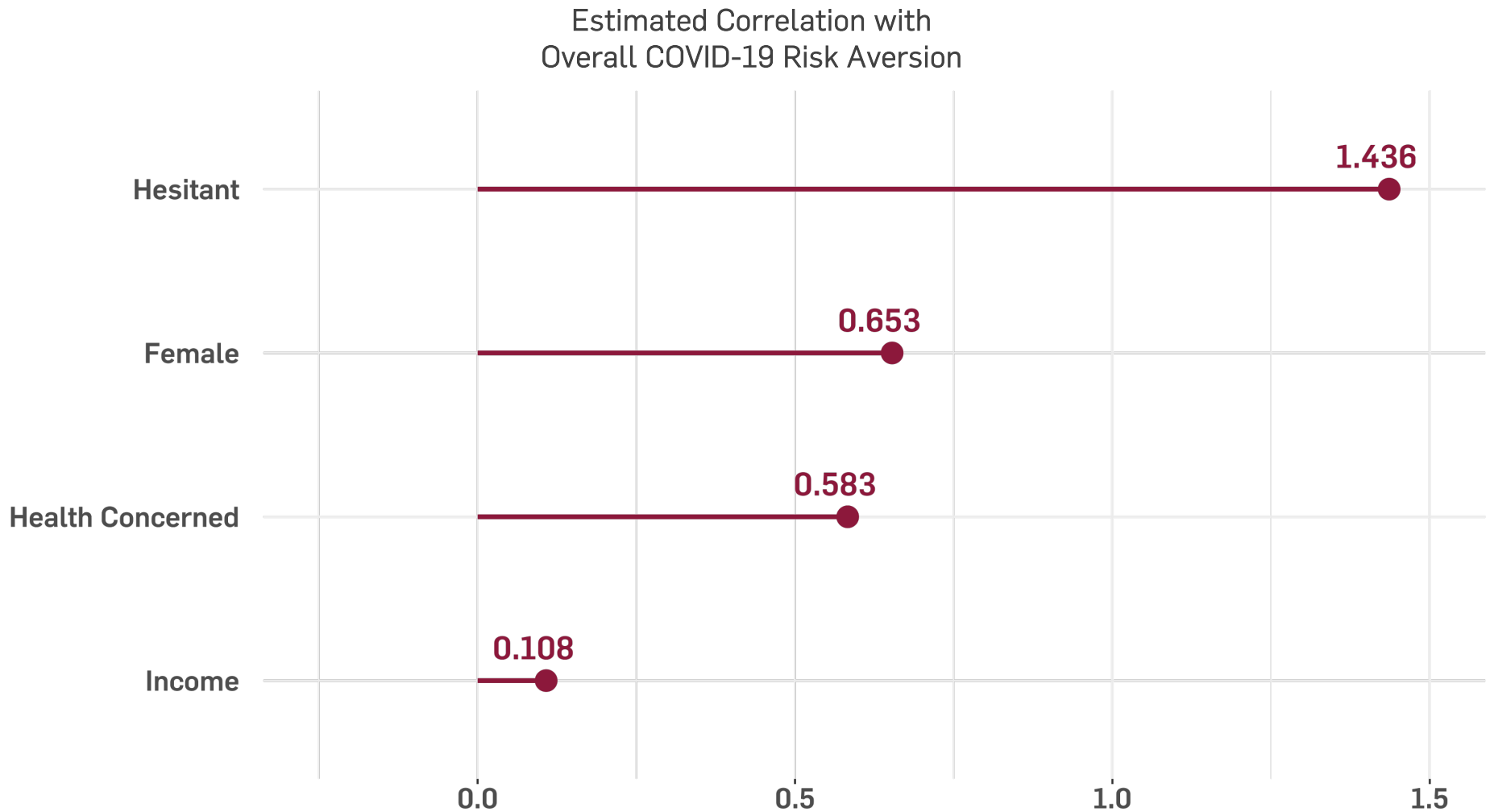


PREDICTING ATTITUDES

RISK INDEX SCORING & RELATED PERCEPTIONS

OVERALL COVID-19 RISK AVERSION

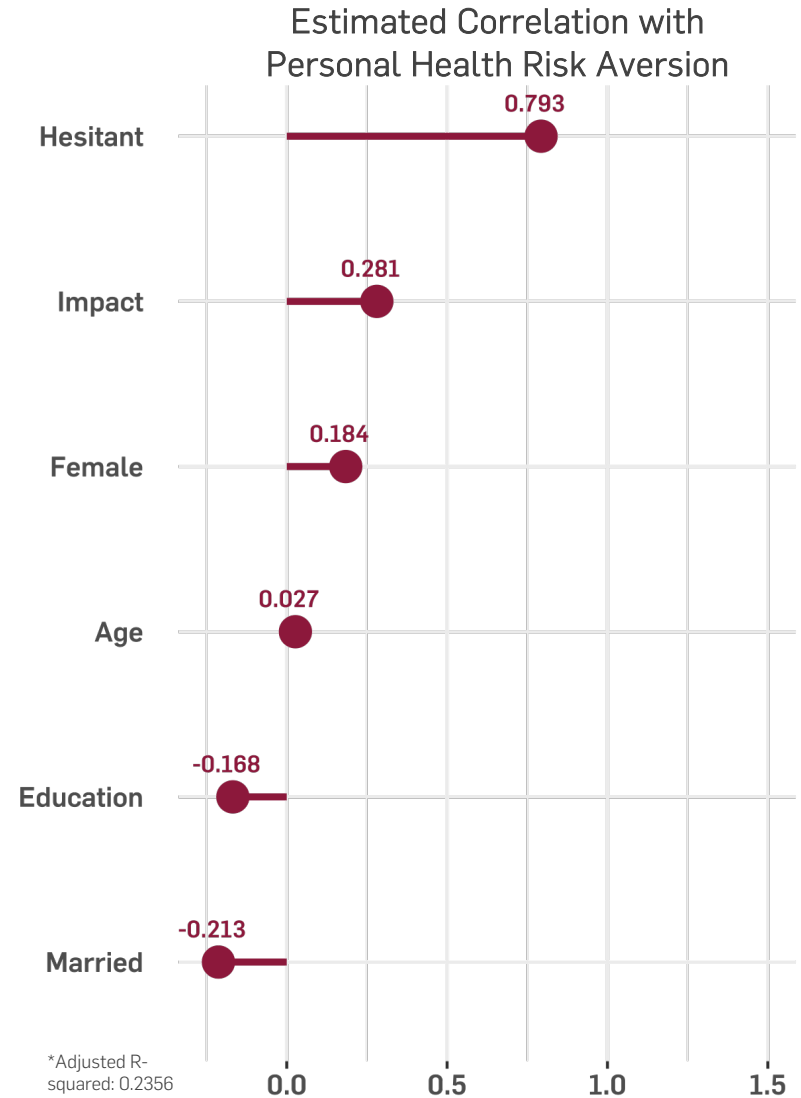
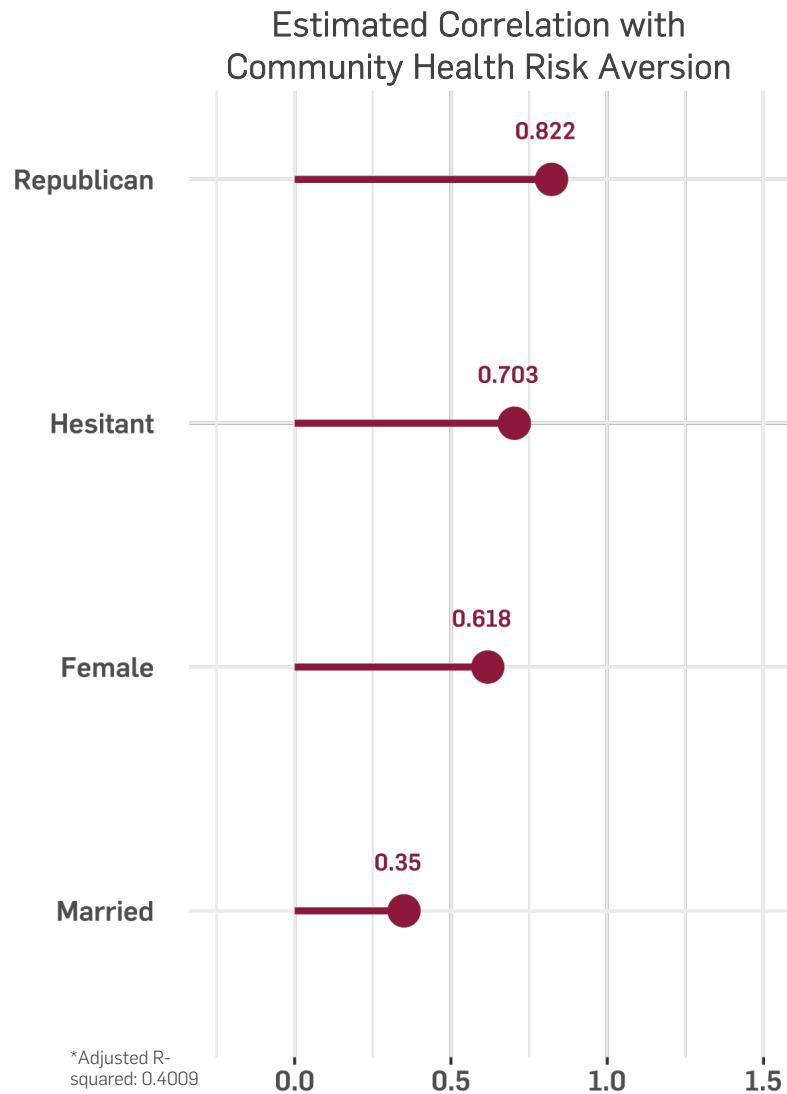
Overall COVID-19 risk aversion is most strongly correlated with hesitancy for government to lift restrictions. In addition, women are more likely on average to avoid taking risks with COVID-19 spread as are those who say they are more concerned with the public health impacts of COVID rather than the economic impacts. Income is also positively correlated with risk aversion.



*Linear model regression coefficients shown above. The following controls were regressed on the total risk aversion index score: age, gender, income, education, married, political party, response to QCOVIDIMPACTS, response to QCOVIDLIFT, response to QCOVIDEXPOSURE, response to QCOVIDIMPACT. Only results significant at the .1 level are shown above. Adjusted R-squared: 0.3226

COMMUNITY & PERSONAL HEALTH RISK AVERSION

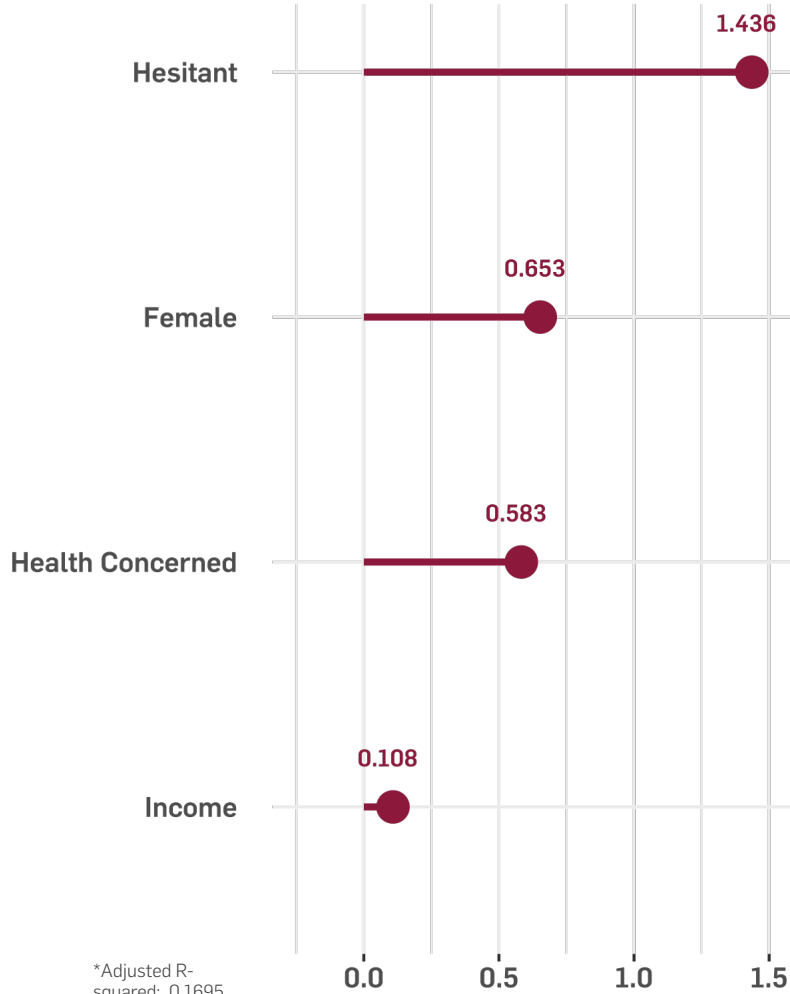
Those most concerned with avoiding community health risks include residents who identify as being Republican, those who are hesitant for government to lift restrictions, women, and married residents. When it comes to personal health risk aversion, some of those attributes carry over. However, married individuals are less averse to personal health risks on average.



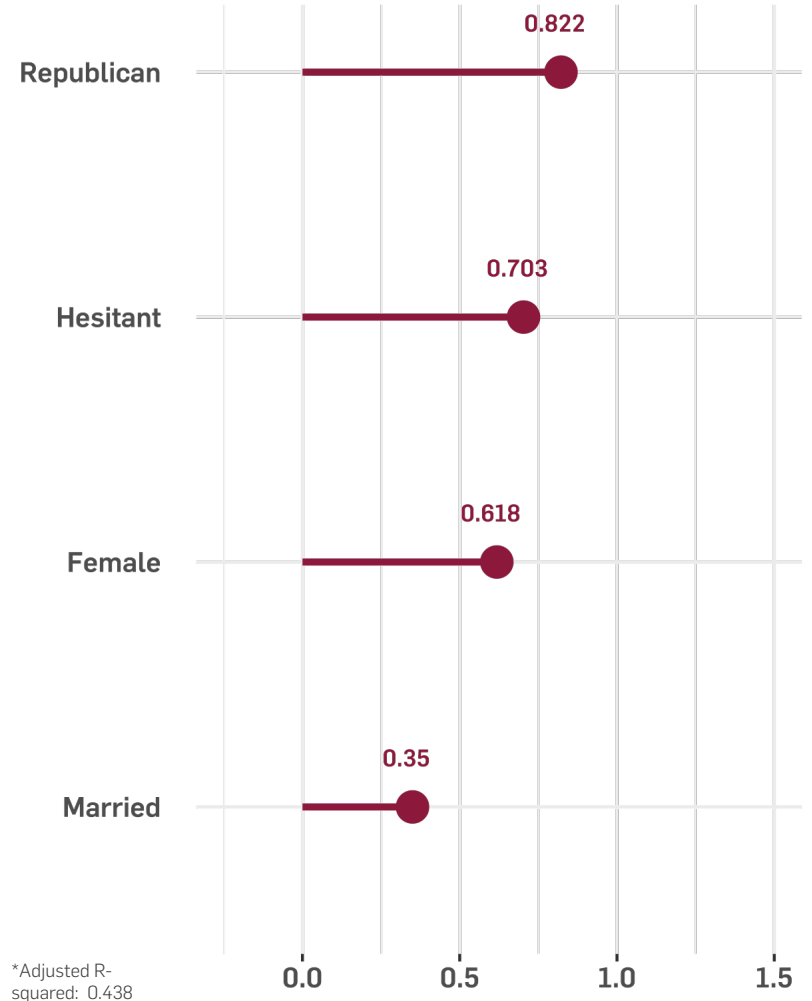
TRUST IN LEADERSHIP

When it comes to leadership, women are slightly more likely than men to approve of the job government organizations are doing handling the COVID-19 pandemic. In addition, those who say they are hesitant to lift restrictions and those that are concerned about the public health impacts of COVID-19 are also more likely, on average, to trust government leaders.

Estimated Correlation with Approval of Overall Leadership



Estimated Correlation with Approval of Local Leadership



MODEL SUMMARIES

EXTENDED RESULTS OF OLS REGRESSION MODELING

OVERALL RISK INDEX

variable	estimate	std.error	statistic	p.value
(Intercept)***	9.94521132	0.582557509	17.0716387	3.384141e-53
Age***	0.02545991	0.006001483	4.2422702	2.577330e-05
Female .	0.34873392	0.219592579	1.5880952	1.128126e-01
Income	-0.06395816	0.060231188	-1.0618777	2.887354e-01
Education	0.05171119	0.138880060	0.3723443	7.097733e-01
Married	-0.15754629	0.259946711	-0.6060715	5.447056e-01
Republican .	-0.51976173	0.269378789	-1.9294827	5.416094e-02
Democrat	0.09438547	0.284136735	0.3321833	7.398715e-01
Health Concerned***	1.17482490	0.265528447	4.4244785	1.155975e-05
Hesitant***	2.40973083	0.274387590	8.7822151	1.822238e-17
Exposure	-0.12326997	0.342233552	-0.3601925	7.188350e-01
Impact**	0.65814519	0.239357142	2.7496367	6.153141e-03

FACTOR: COMMUNITY HEALTH

variable	estimate	std.error	statistic	p.value
(Intercept)***	5.150287083	0.323043241	15.9430269	1.106442e-47
Age	0.002608771	0.003327978	0.7838908	4.334259e-01
Female	0.196534104	0.121769778	1.6139810	1.070783e-01
Income	0.019097033	0.033399755	0.5717717	5.676994e-01
Education	0.092807095	0.077012593	1.2050899	2.286626e-01
Married	-0.012490699	0.144147190	-0.0866524	9.309779e-01
Republican	-0.181031029	0.149377522	-1.2119027	2.260456e-01
Democrat	0.191897023	0.157561185	1.2179207	2.237519e-01
Health Concerned***	0.768211510	0.147242407	5.2173251	2.535080e-07
Hesitant***	1.703349150	0.152155032	11.1948263	1.841426e-26
Exposure	-0.183260509	0.189777377	-0.9656605	3.346187e-01
Impact***	0.439524141	0.132729740	3.3114217	9.862386e-04

FACTOR: PERSONAL HEALTH

variable	estimate	std.error	statistic	p.value
(Intercept)***	1.98476124	0.278818707	7.1184651	3.256111e-12
Age***	0.02714197	0.002872379	9.4492992	8.421279e-20
Female .	0.18421194	0.105099527	1.7527381	8.017806e-02
Income	-0.02182403	0.028827338	-0.7570603	4.493227e-01
Education*	-0.16820382	0.066469590	-2.5305380	1.165350e-02
Married .	-0.21336207	0.124413478	-1.7149434	8.689253e-02
Republican	-0.09078798	0.128927779	-0.7041770	4.816066e-01
Democrat	-0.11296350	0.135991101	-0.8306683	4.065046e-01
Health Concerned***	0.18353251	0.127084961	1.4441718	1.492334e-01
Hesitant***	0.79264229	0.131325048	6.0357281	2.832486e-09
Exposure	0.05325374	0.163796904	0.3251205	7.452077e-01
Impact*	0.28098732	0.114559074	2.4527723	1.447093e-02

GENERAL TRUST OF LEADERS

variable	estimate	std.error	statistic	p.value
(Intercept)***	7.656939724	0.479371554	15.9728704	7.940978e-48
Age	0.002554423	0.004938466	0.5172503	6.051797e-01
Female***	0.652512398	0.180697071	3.6110845	3.314708e-04
Income*	0.108436728	0.049562692	2.1878700	2.907947e-02
Education	-0.102045173	0.114280820	-0.8929335	3.722650e-01
Married	0.248556087	0.213903446	1.1620013	2.457153e-01
Republican	0.181877747	0.221664860	0.8205078	4.122655e-01
Democrat	0.380164329	0.233808793	1.6259625	1.045036e-01
Health Concerned**	0.583371880	0.218496513	2.6699368	7.800313e-03
Hesitant***	1.435898571	0.225786473	6.3595420	4.119000e-10
Exposure	-0.142264321	0.281615166	-0.5051728	6.136304e-01
Impact	-0.181550122	0.196960821	-0.9217575	3.570403e-01

FACTOR: TRUST OF LOCAL LEADERS

variable	estimate	std.error	statistic	p.value
(Intercept)***	5.150287083	0.323043241	15.9430269	1.106442e-47
Age	0.002608771	0.003327978	0.7838908	4.334259e-01
Female	0.196534104	0.121769778	1.6139810	1.070783e-01
Income	0.019097033	0.033399755	0.5717717	5.676994e-01
Education	0.092807095	0.077012593	1.2050899	2.286626e-01
Married	-0.012490699	0.144147190	-0.0866524	9.309779e-01
Republican	-0.181031029	0.149377522	-1.2119027	2.260456e-01
Democrat	0.191897023	0.157561185	1.2179207	2.237519e-01
Health Concerned***	0.768211510	0.147242407	5.2173251	2.535080e-07
Hesitant***	1.703349150	0.152155032	11.1948263	1.841426e-26
Exposure	-0.183260509	0.189777377	-0.9656605	3.346187e-01
Impact***	0.439524141	0.132729740	3.3114217	9.862386e-04



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