



UTAH CULTURAL ALLIANCE

40 YEARS



ARTS & CULTURE



Utah Department of
Heritage & Arts



AUDIENCE SENTIMENT

2021 PUBLIC OPINION RESEARCH

SALT LAKE COUNTY REPORT



1. The majority of Salt Lake County voters are currently comfortable visiting stores and restaurants and are [slightly less comfortable visiting entertainment or cultural venues](#). However, among those currently uncomfortable, [over half anticipate feeling comfortable within the next 6 months](#).
2. Under current conditions, [nearly half of respondents would be very open to attending outdoor concerts, plays, or other performances](#). 2 in 5 would also be comfortable visiting zoos, botanical gardens, or aquariums or going to a live sporting event.
3. [Mask requirements and surface sanitization](#) are widely considered the [most important safety measures](#) that venues could take. In addition, widespread vaccination will also significantly increase comfort in attending live entertainment venues.
4. Most voters expect that their [post-pandemic participation in the cultural sector will return to or exceed pre-covid levels](#). Zoos, gardens, or aquariums, festivals/cultural events, and live theater are the activities SLCo voters are most enthusiastic to reengage with.
5. Averaged across all live entertainment & culture activities, [1 in 3 voters anticipate spending more on the activity post-covid](#).

KEY FINDINGS TO REMEMBER

COVID PERCEPTIONS

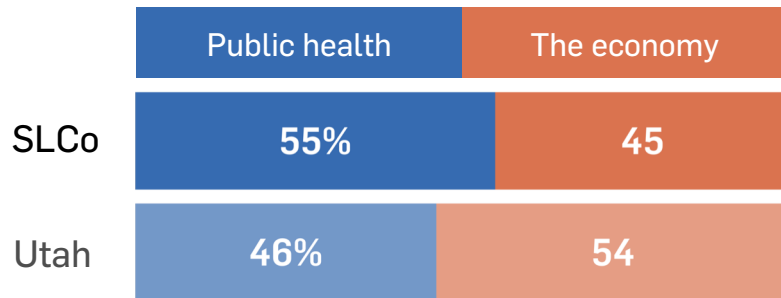
FEELINGS, CONCERNS, INVOLVEMENT WITH COVID-19

COVID EXPERIENCES & PERCEPTIONS AT A GLANCE

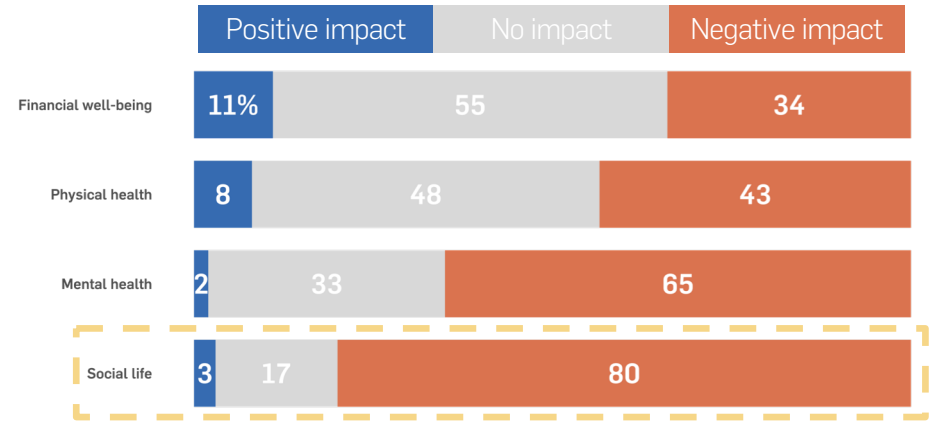
Over half of respondents said that the impacts of coronavirus on public health are more concerning than the virus's impact on the economy – consistent with findings from a survey of SLCo residents in July 2020. The story is reversed among Utah voters statewide, however, with 54% indicating that they are more concerned with economic impacts. 65% of SLCo voters say that coronavirus has negatively impacted their mental health and 4-in-5 say the same about their social life.



Which of the following would you say is more concerning to you, personally? The impacts of the coronavirus on... (n=582)



Would you say the coronavirus has had a positive impact, a negative impact, or no impact on your...? (n= 586-589)



82%

SLCo voters feel they can *protect themselves against the virus*

64%

Feel comfortable *participating in regular day-to-day activities* in current conditions

72%

Say current health & safety protocols are *effectively mitigating the risk of the virus*

CONSUMER SENTIMENT

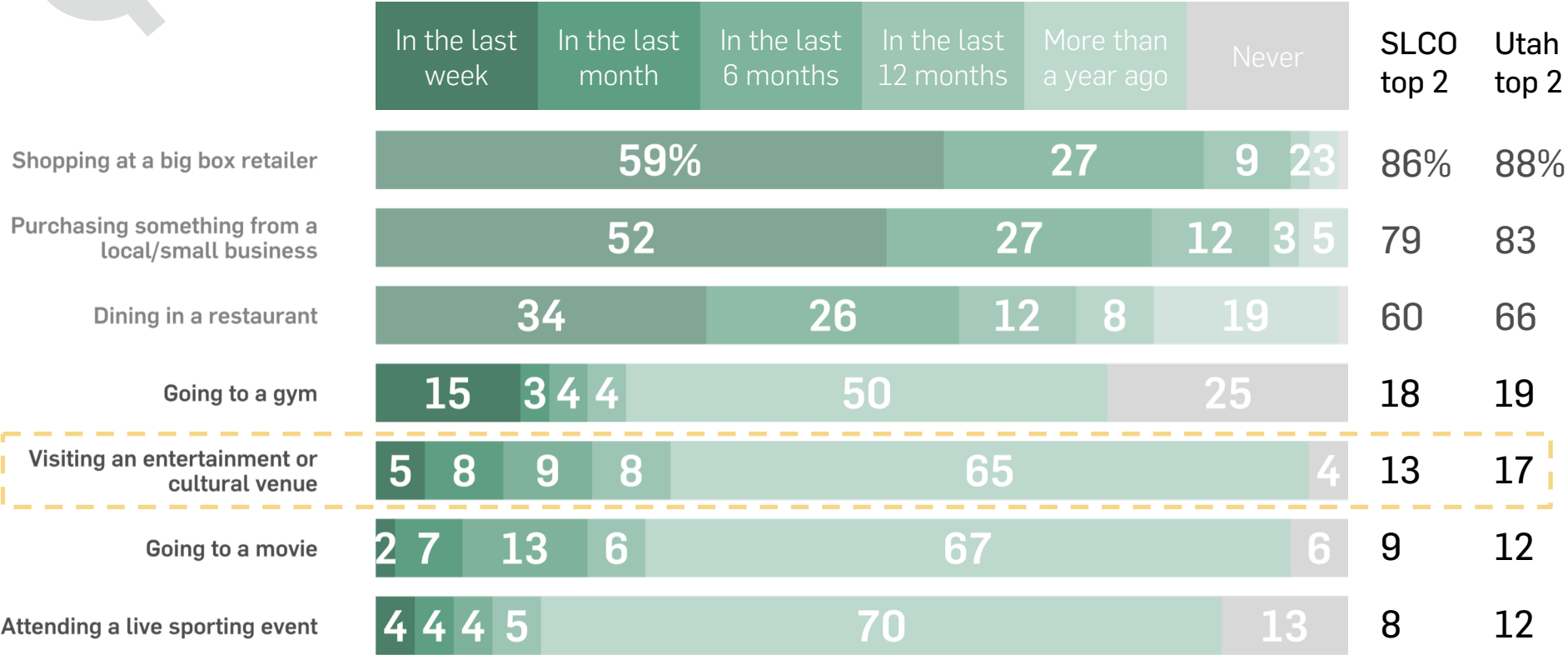
ENGAGEMENT IN COMMERCIAL & CULTURAL ACTIVITIES

VISITS TO STORES AND RESTAURANTS HIGH WHILE VISITS TO VENUES REMAIN LOW

Only 26% of Utahns visited an entertainment or cultural venue within the last 6 months. Fewer Salt Lake County residents have participated in all activities in the last week or month. However, over half of county residents have dined at a restaurant, shopped at small businesses, and shopped at big box retailers within the past month.



When was the last time you participated in each of the following activities? (n=563-564)

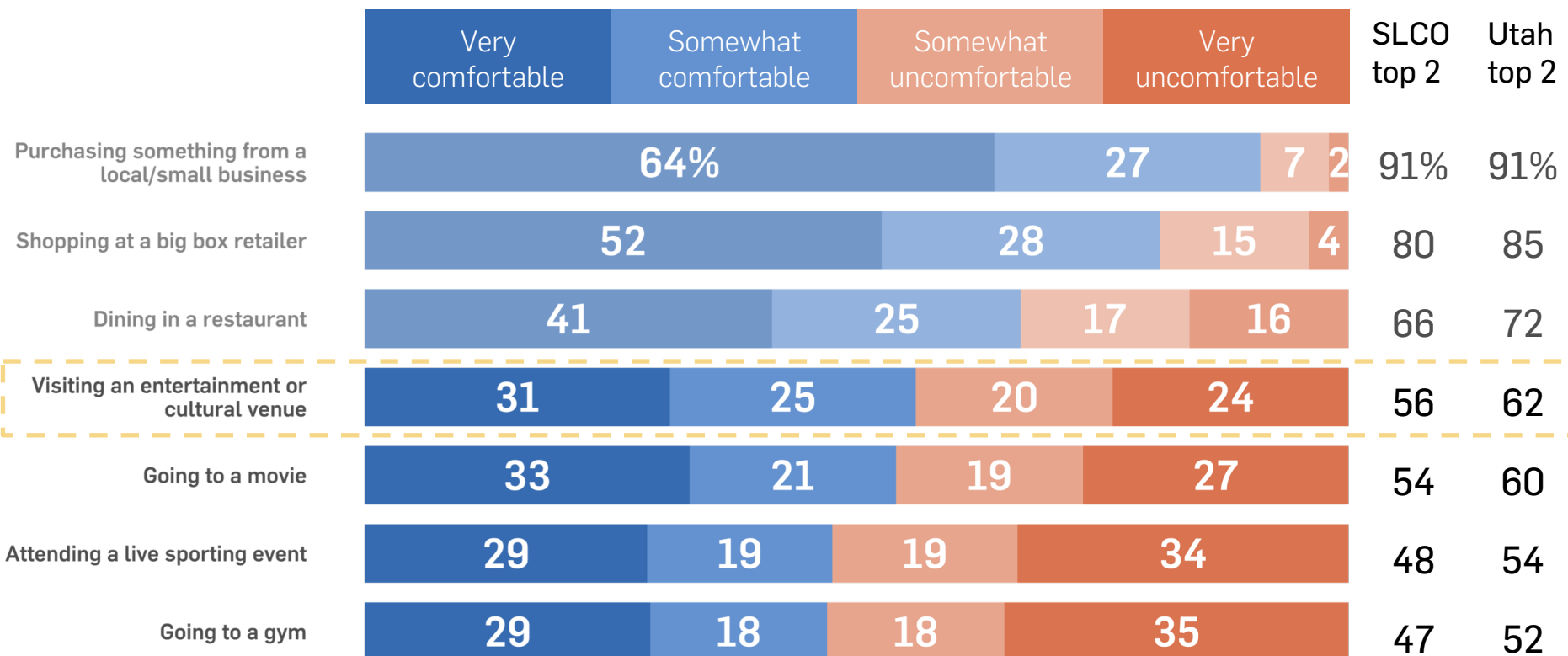


OVER 50% COMFORTABLE VISITING VENUES

Over 50% of respondents are very comfortable shopping and dining. County residents are less likely to be very comfortable visiting entertainment or cultural venues, with only 31% saying they would feel “very comfortable” visiting an entertainment or cultural venue under current conditions.



Regardless of current restrictions in your area, how comfortable would you feel participating in each of the following activities at this time? (n=560-562)

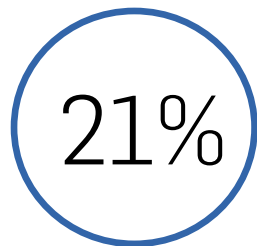
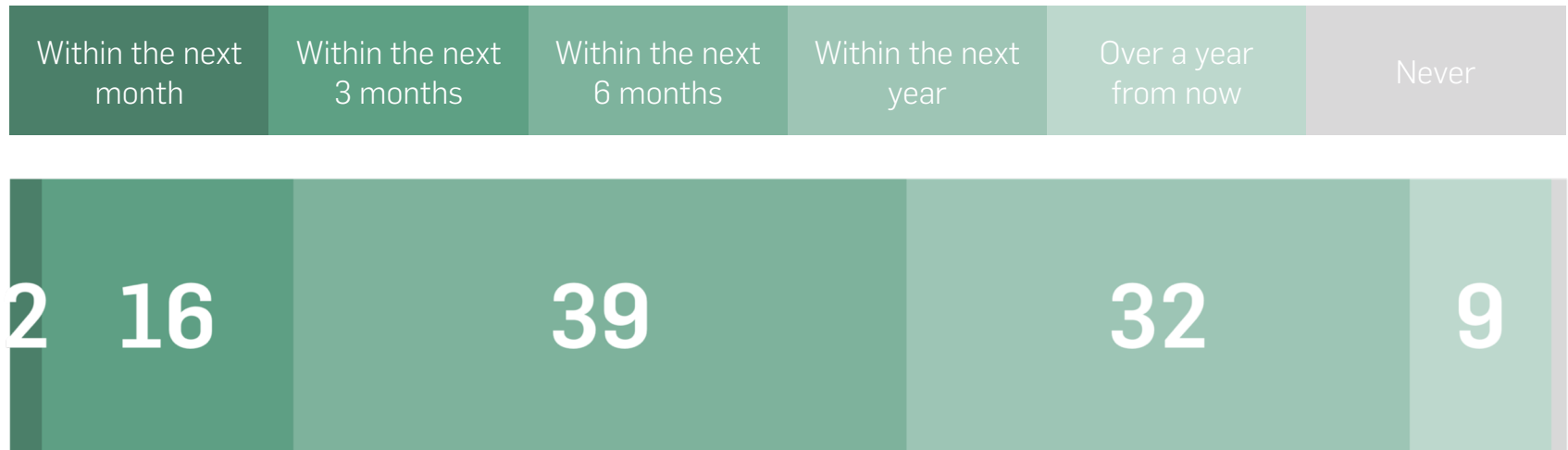


AMONG THOSE UNCOMFORTABLE, OVER HALF WOULD VISIT WITHIN THE NEXT 6 MONTHS

89% of respondents anticipate feeling comfortable attending live events within the next year. 57% anticipate feeling comfortable within 6 months and 18% in 3 months or less.



When do you anticipate feeling comfortable attending live events or visiting an entertainment or cultural venue? (n = 248)



Among those most concerned about *public health impacts*, 21% are willing to return *within the next 3 months*



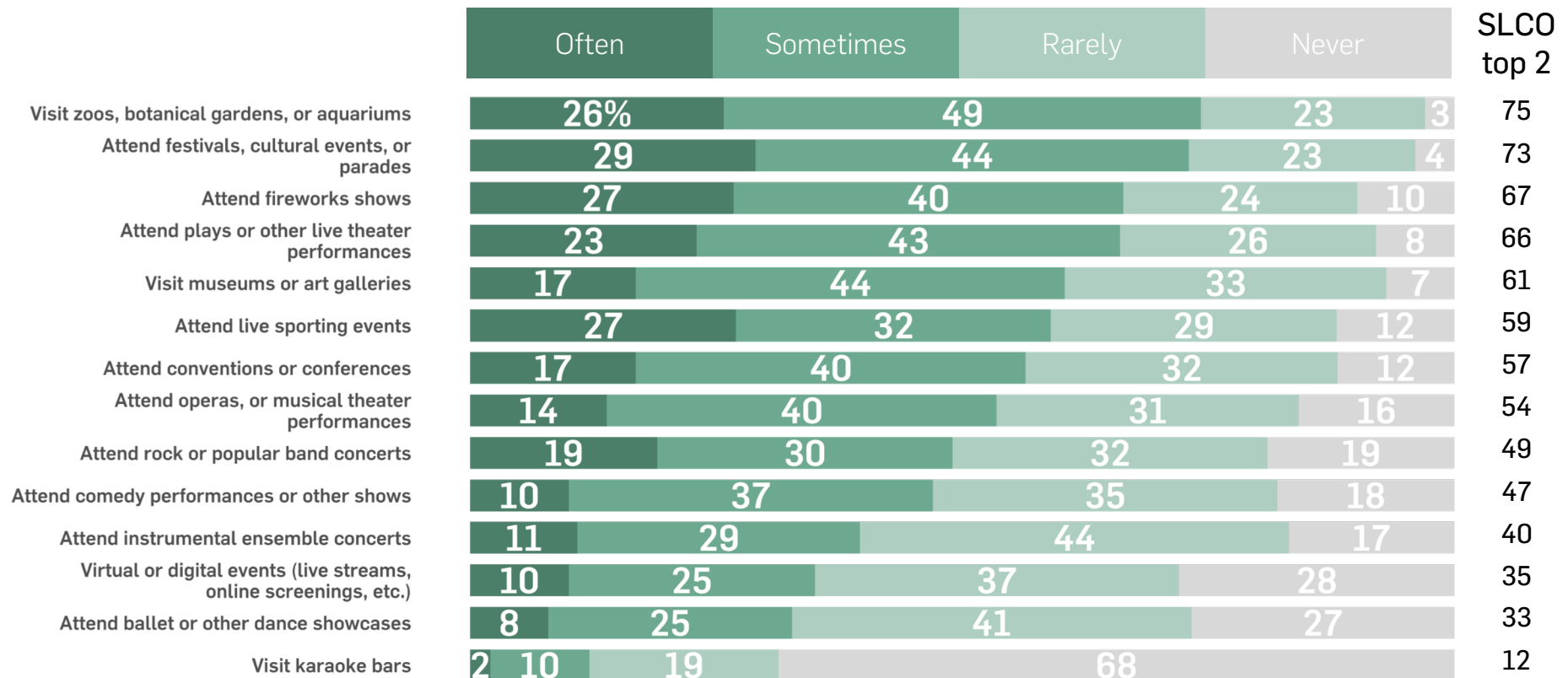
Among those most concerned about *economic impacts*, 25% are willing to return *within the next 3 months*

ZOOS/AQUARIUMS, FESTIVALS, AND FIREWORKS MOST COMMON ACTIVITIES PRIOR TO PANDEMIC

Before the coronavirus outbreak, over 50% of respondents visited zoos, gardens, aquariums, or museums and participated in festivals, cultural events, parades, sporting events, plays, and other live theater performances sometimes or often. Most respondents rarely or never visit karaoke bars.



Thinking back to before the coronavirus outbreak, about how often did you or members of your household participate in the following types of activities? (n=555 - 556)



SAFETY MEASURES

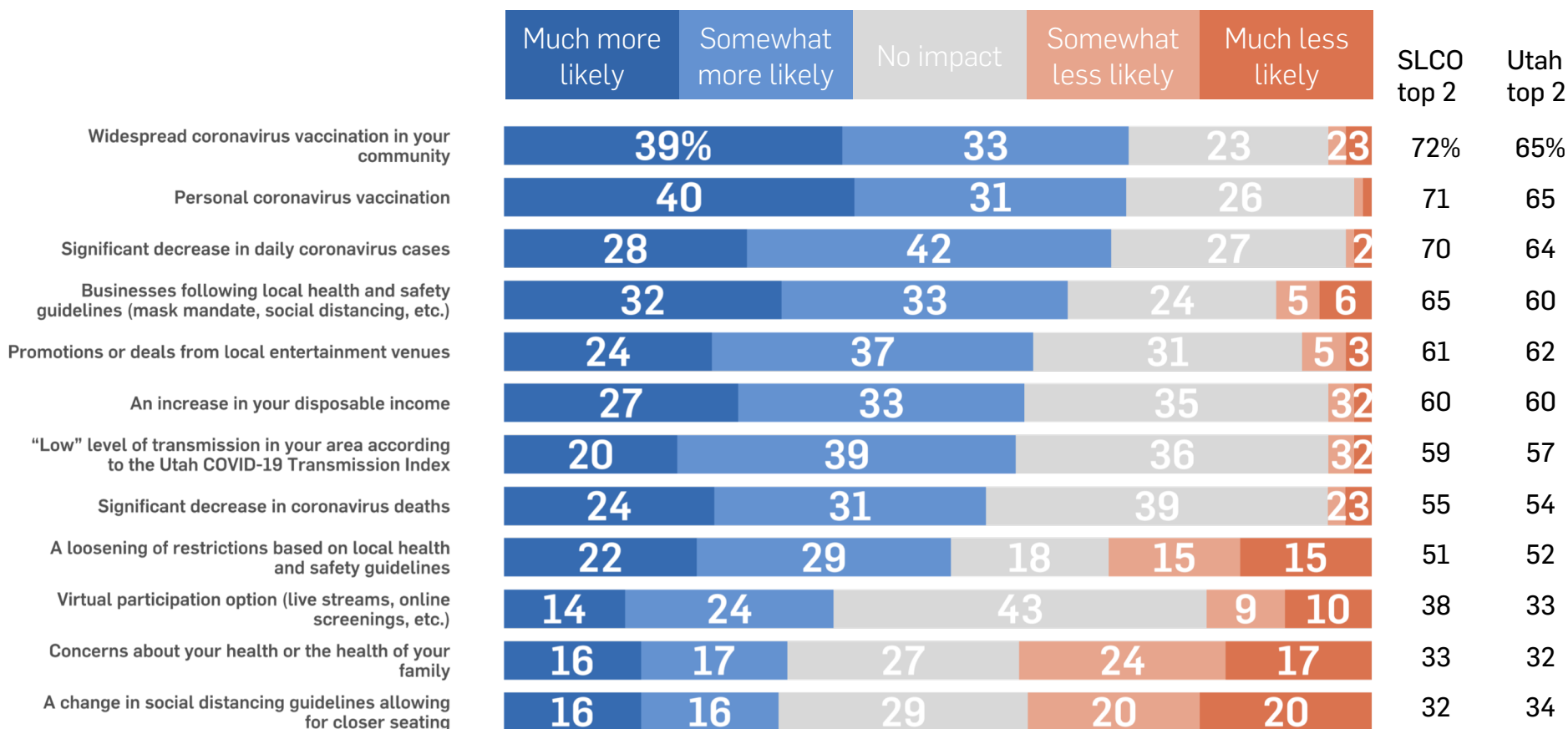
SENTIMENTS SURROUNDING COVID SAFETY

VACCINES AND SAFETY GUIDELINES KEY

The factors most likely to stimulate participation in live events are personal and community vaccinations. In addition, nearly a third of respondents say they would be “much more likely” to attend events if businesses followed safety guidelines.



Thinking about the different types of live entertainment, arts, and cultural events in your community—like concerts, shows, or other live performances – would the following conditions make you more or less likely to attend such events? (n=511-514)

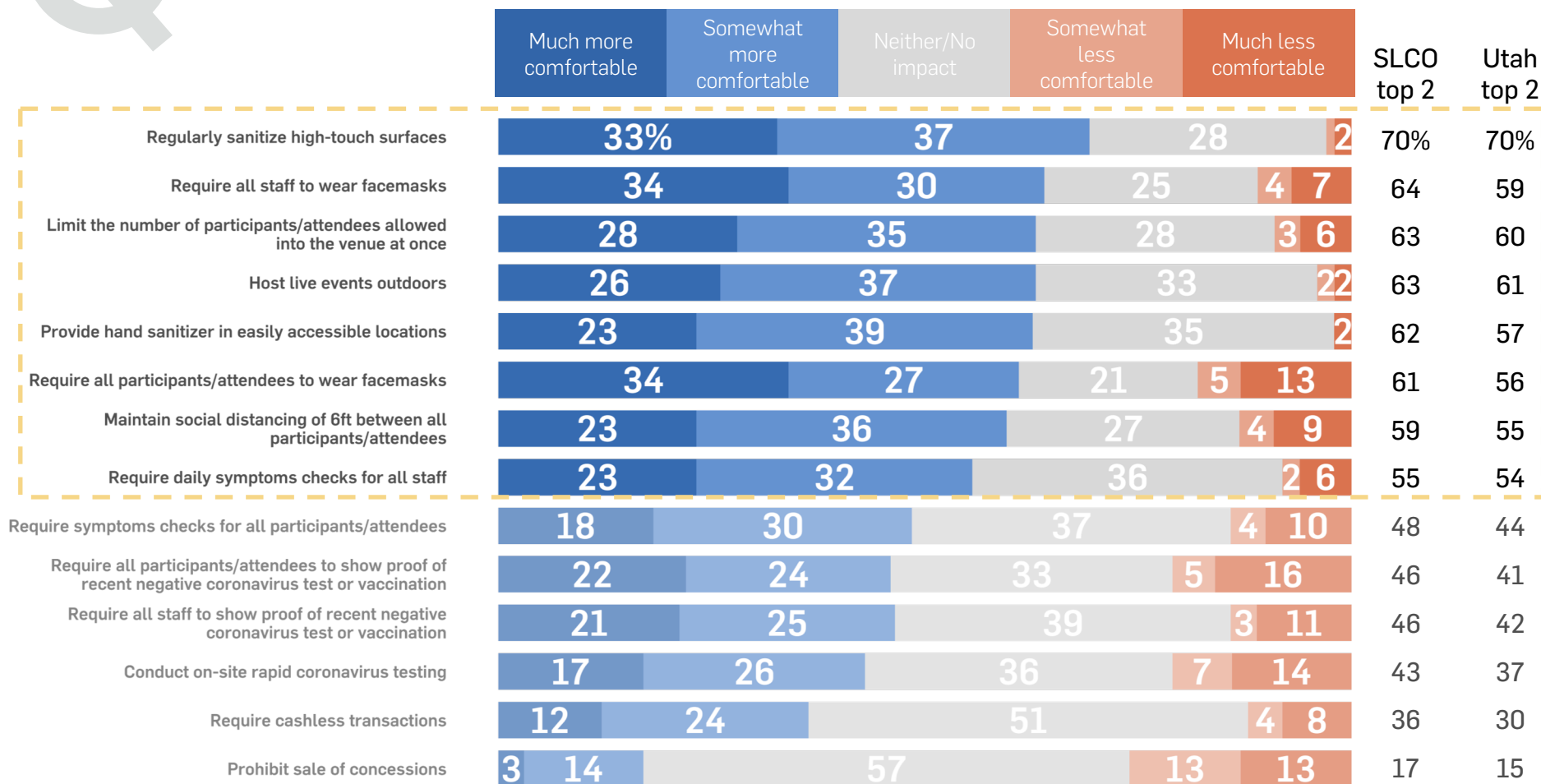


SANITIZATION, FACEMASKS INCREASE COMFORT

70% of voters say they would be more comfortable attending events if surfaces were regularly sanitized. Additionally, 34% of respondents would feel *much* more comfortable attending live events if both staff and all participants/attendees are required to wear facemasks.



Thinking about the different types of live entertainment, arts, and cultural events in your community—like concerts, shows, or other live performances—would you feel more or less comfortable attending such events if venues were to... (n=488-492)

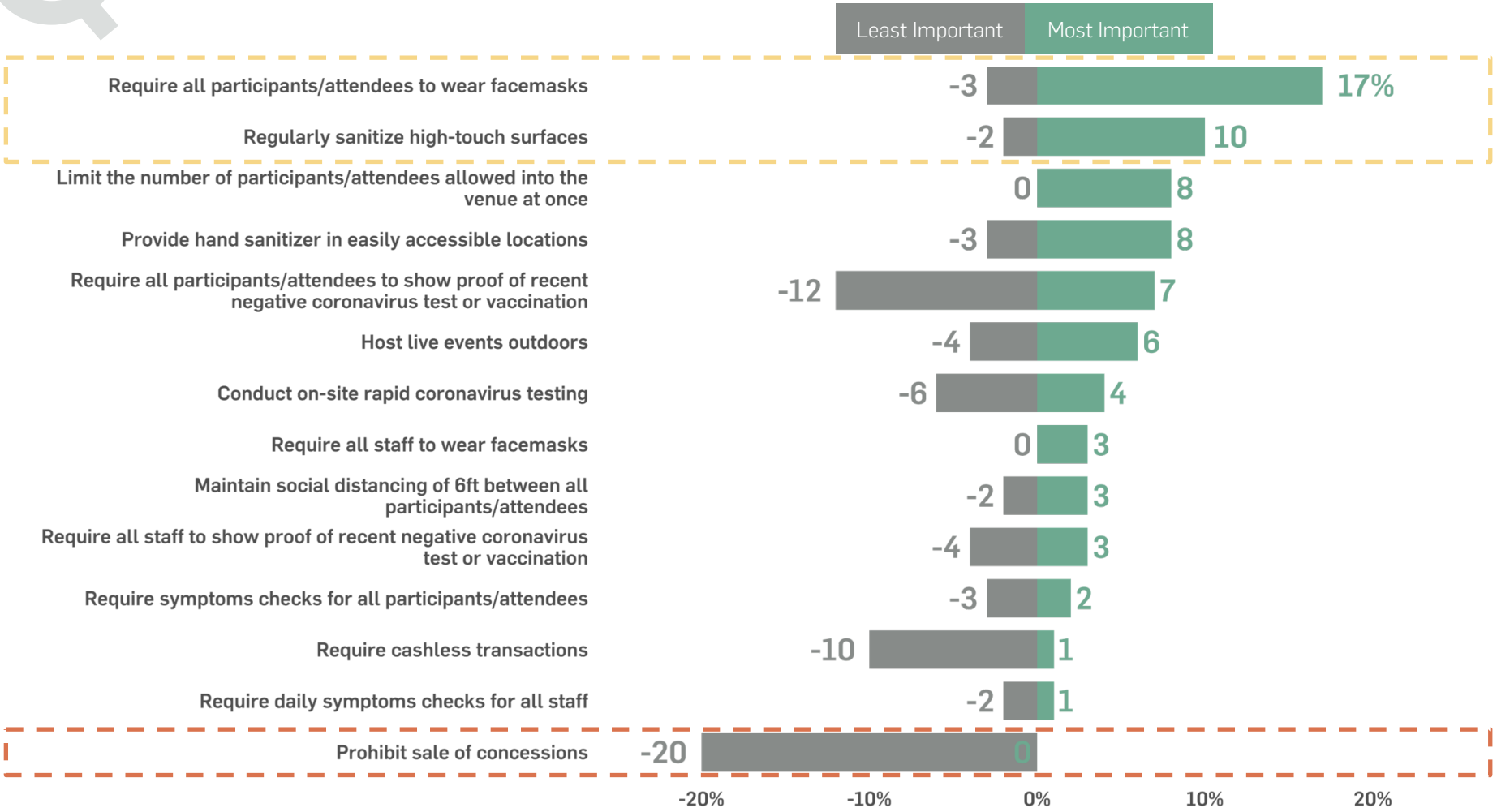


FACEMASKS & SANITATION MOST IMPORTANT

When asked to choose, SLCo voters see facemask requirements for attendees and regular sanitization of high-touch surfaces as the most important safety measures venues can institute, with limitations on attendance coming in third place. Prohibiting the sale of concessions, however, is largely viewed as the least important measure.



Given this list of potential safety measures that could be taken by entertainment or cultural venues, which of the following do you consider the most important? Which do you consider least important?

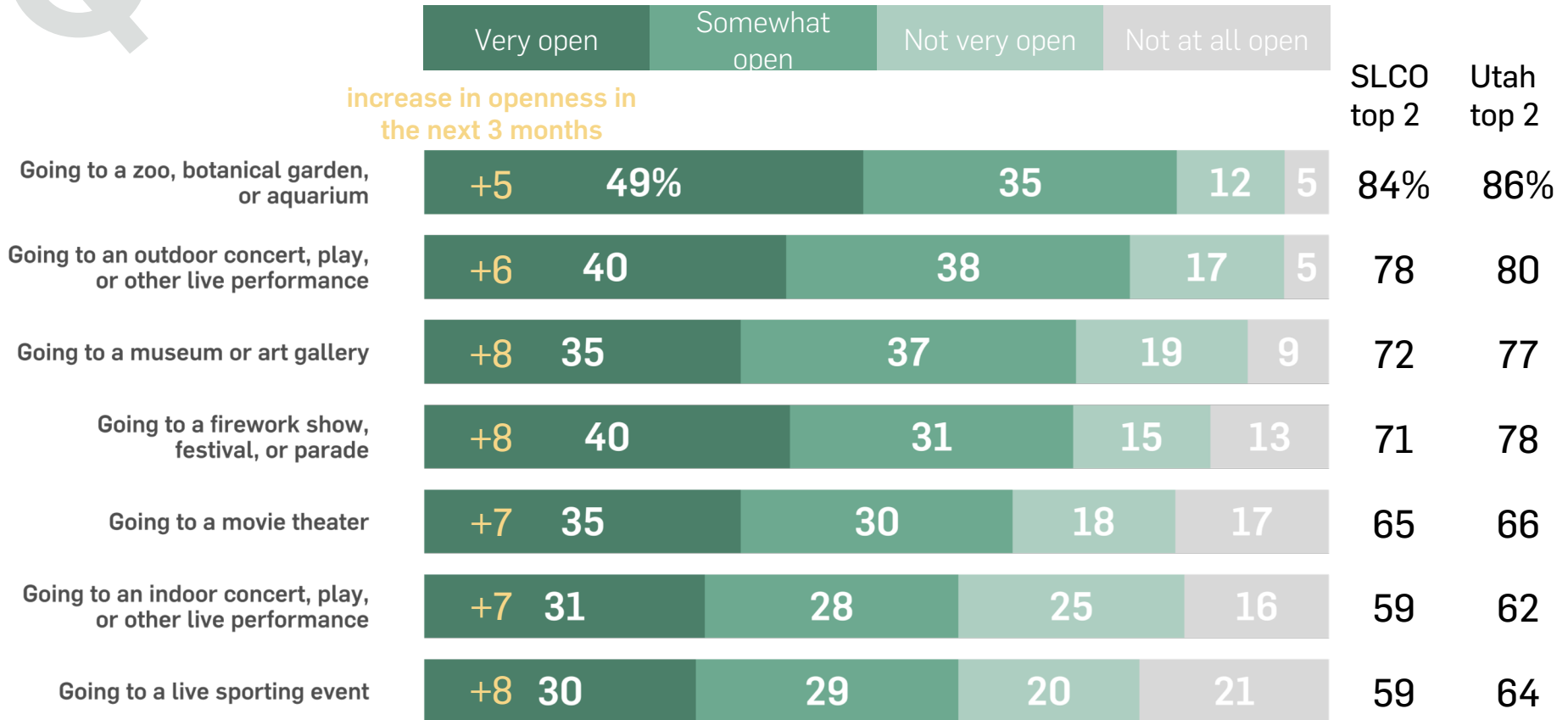


MOST OPEN TO OUTDOOR EVENTS

A vast majority of respondents say they are currently open to attending a zoo (84%), an outdoor concert/live performance (78%), or a museum/art gallery (72%). The activities SLCo residents are least open to include attending live sporting events, movies, and indoor concerts/performances. When asked about the next 3 months, the proportion very open to participating increases slightly, however the same general ranking holds.



Assuming health and safety guidelines are followed – how open would you be to participating in each of the following activities under current COVID conditions? (n=320-465)



FUTURE ENGAGEMENT

SLCO VOTERS MOST LOOK FORWARD TO ZOOS, FESTIVALS, AND LIVE PERFORMANCES

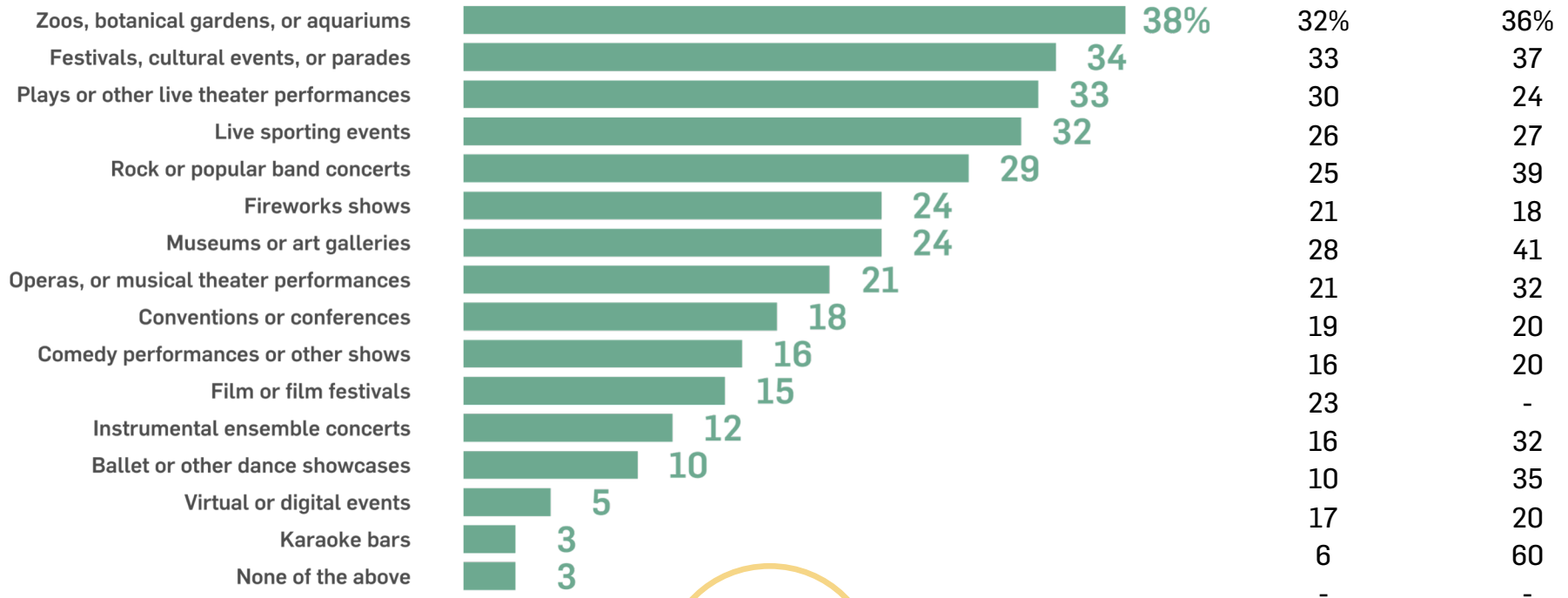
Respondents report being most excited to reengage with zoos and aquariums (38%), festivals and cultural events (34%), live theater performances (33%), and live sporting events (32%). Many expect that they will likely participate in these activities more often post-pandemic than they did pre-covid, and 1-in-3 expect their spending to increase.



What types of venues and events, if any, are you most excited to reengage with? Select all that apply. (n=649)

Compared to pre-covid levels...

% who anticipate participating more % who anticipate spending more



32%

Average share of SLCo voters who say they will likely *spend more when attending live entertainment activities* post-pandemic



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APPENDIX

SAMPLE COMPOSITION & SUPPLEMENTAL FINDINGS

SURVEY METHODOLOGY

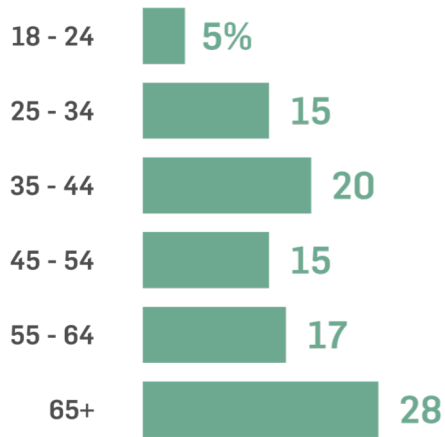
SAMPLING, MODE, & MARGIN OF ERROR

- For this survey, 649 Salt Lake County voters were sampled via the publicly available registered voter file. Completed surveys were conducted via online interviews.
- The data were weighted to reflect countywide demographic composition according to descriptive statistics from the registered voter population. Weights were used to ensure that the data reflected the population of the county as a whole, specifically regarding age, gender, and ethnicity.
- Online interviews were conducted March 3-22, 2021.
- The margin of error for a survey with 649 responses is approximately ± 3.8 percentage points.

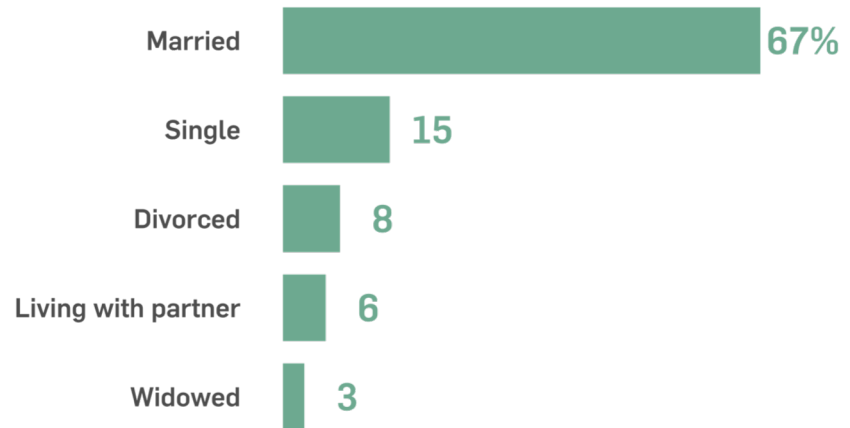
DEMOGRAPHICS

The majority of respondents were white, married, over age 34, and had no children. Data was weighted to match the Utah state voter file.

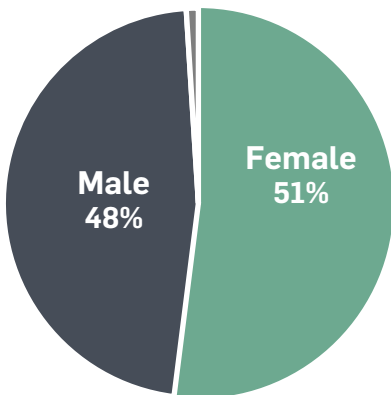
Age



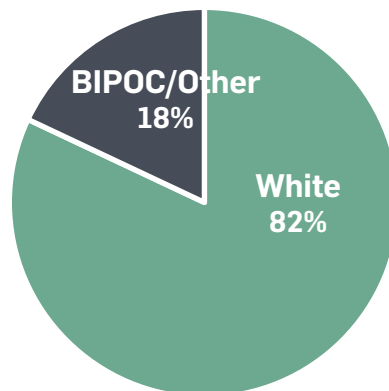
Marital Status



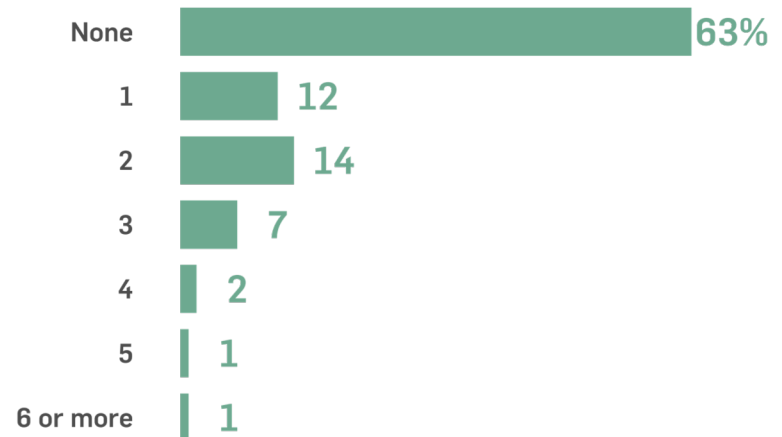
Gender



Race



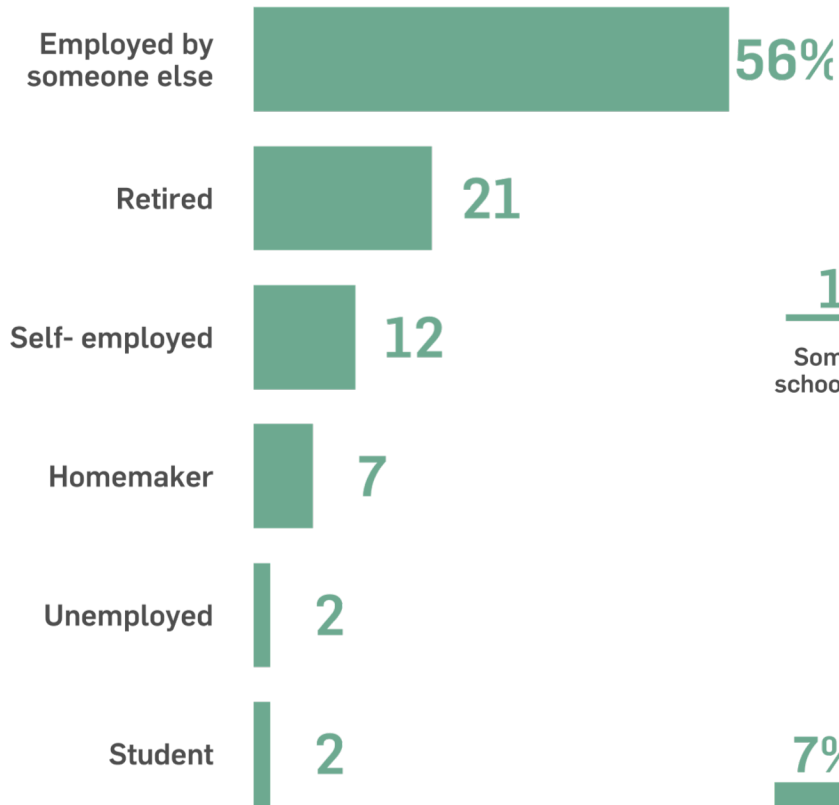
Children



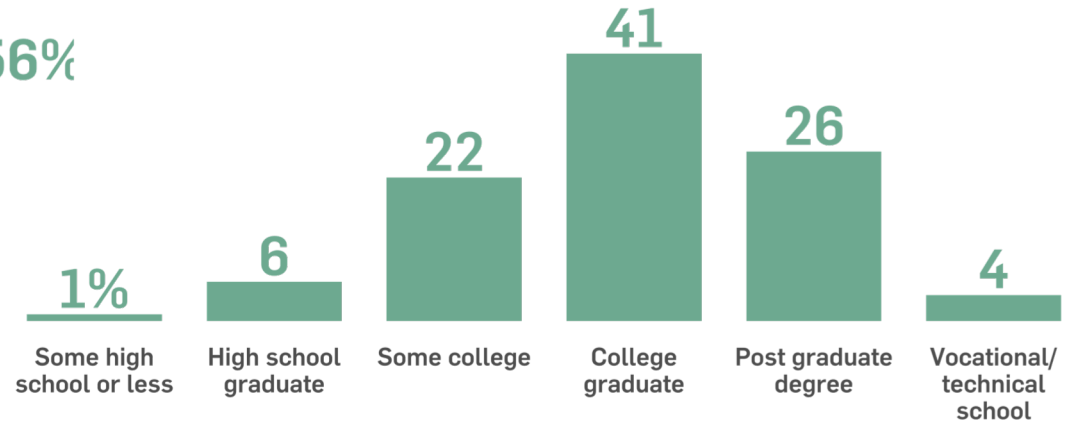
DEMOGRAPHICS

The majority of survey respondents were college graduates, employed by someone else, and have household incomes above \$75,000 a year.

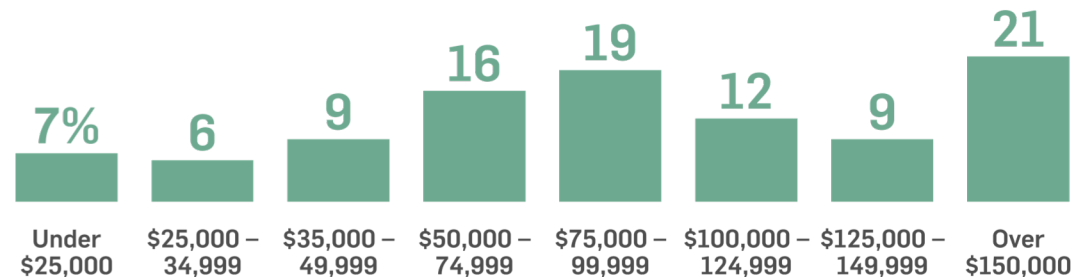
Employment



Education



Income

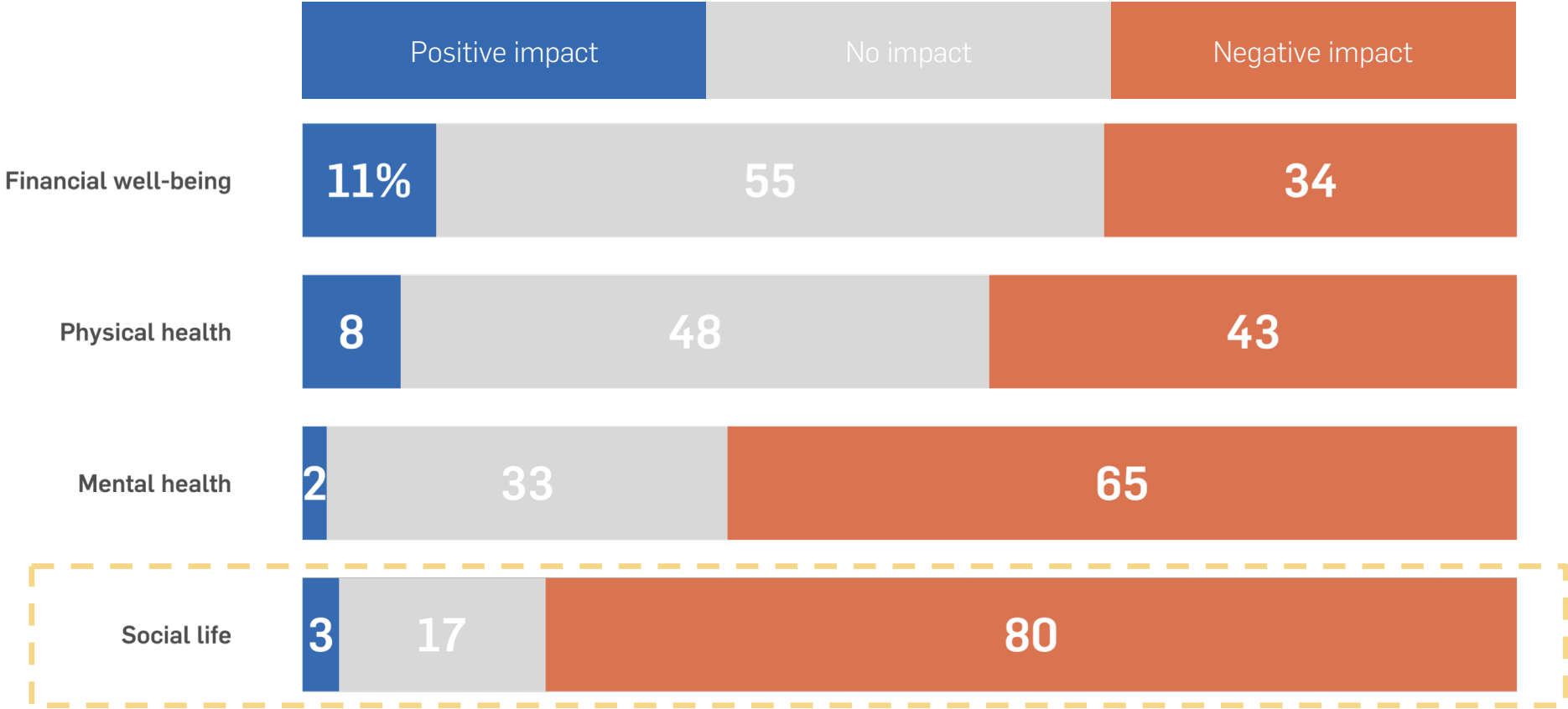


CORONAVIRUS TAKES TOLL ON SOCIAL LIFE

65% of residents say that coronavirus has negatively impacted their mental health and even more (80%) say the same about their social life. Interestingly, 11% say that covid had a positive impact on financial well-being.



Would you say the coronavirus has had a positive impact, a negative impact, or no impact on your...? (n=586-589)



SLCO RESIDENTS SLIGHTLY MORE CONCERNED WITH PUBLIC HEALTH THAN ECONOMIC IMPACTS

Over half of all respondents said that the impacts of coronavirus on the economy are more concerning than the virus's impact on public health. The story is reversed among Salt Lake County residents, however, with 55% of SLCo respondents indicating that they are more concerned with public health impacts.



Which of the following would you say is more concerning to you, personally? The impacts of the coronavirus on... (n=582)

Public health

The economy

55%

45

46%

Among the *statewide sample*, 46% say they are more concerned about *public health impacts*

54%

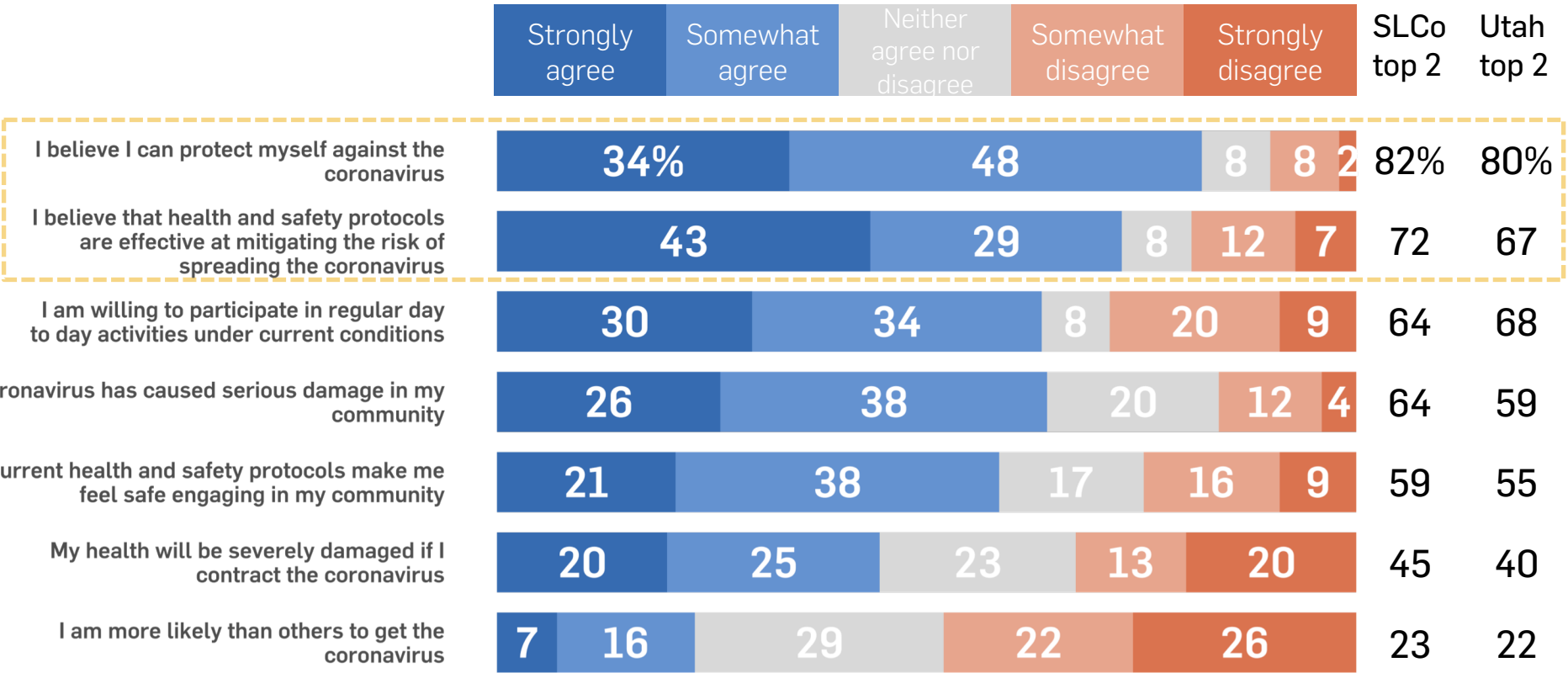
Among the *statewide sample*, 46% say they are more concerned about *economic impacts*

MAJORITY TRUST SAFETY MEASURES

A majority of respondents feel that health and safety protocols are effective at mitigating the risk of spreading the coronavirus. SLCo residents are more likely to think so than the statewide average.



The following statements represent different views about the coronavirus. To what extent do you agree or disagree with each of these statements? (n=558-560)



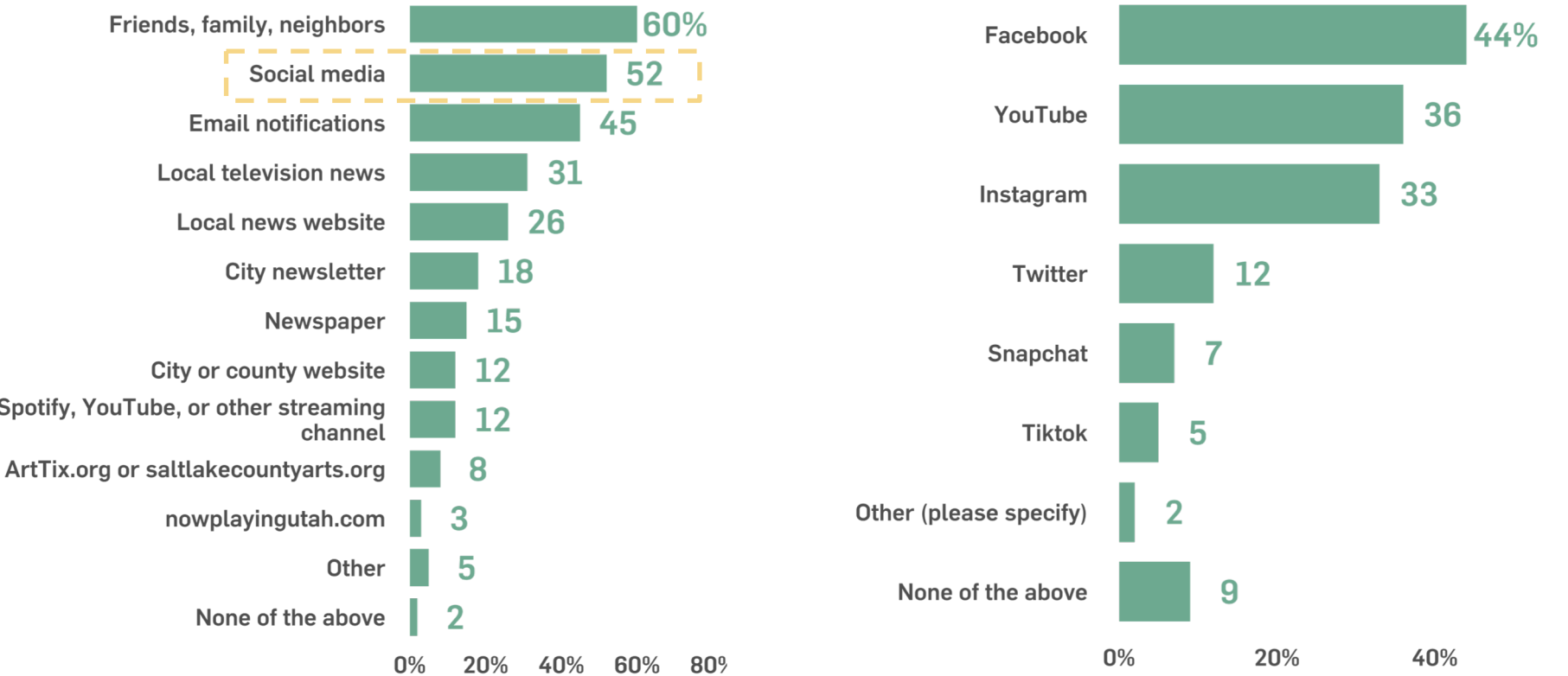
FRIENDS, FAMILY, AND NEIGHBORS ARE MAIN SOURCE OF INFORMATION

Social media and email notifications are also typical information sources regarding live events. ArtTix.org, saltlakecountyarts.org, and nowplayingutah.com are least common. Facebook is the most used social media platform.



From which of the following sources, if any, do you typically receive information about live entertainment, arts, and cultural events in your area? Please select all that apply. (n = 649)

Which of the following social media platforms, if any, do you use regularly? Please select all that apply. (n = 649)

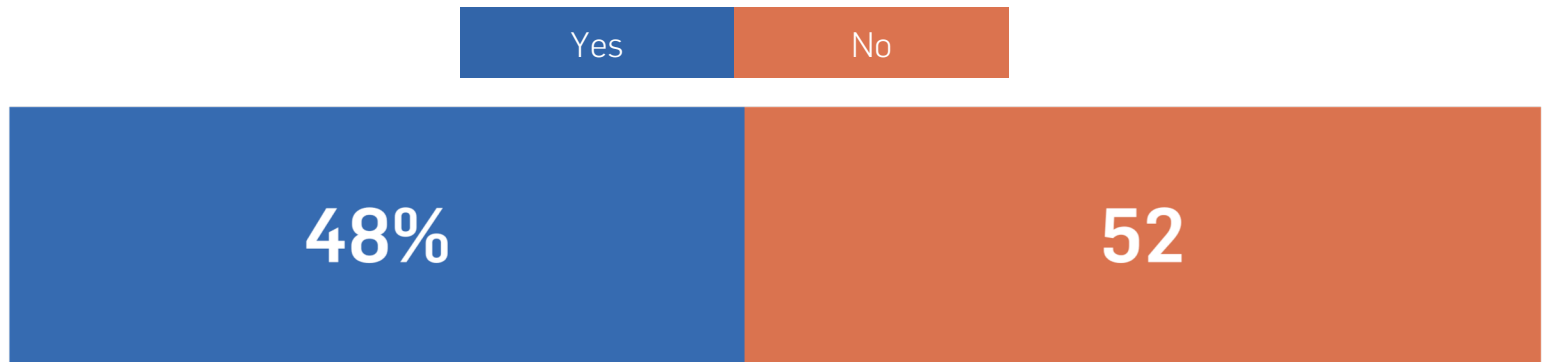


MAJORITY OF DONORS DONATED LESS THAN IN PREVIOUS YEARS

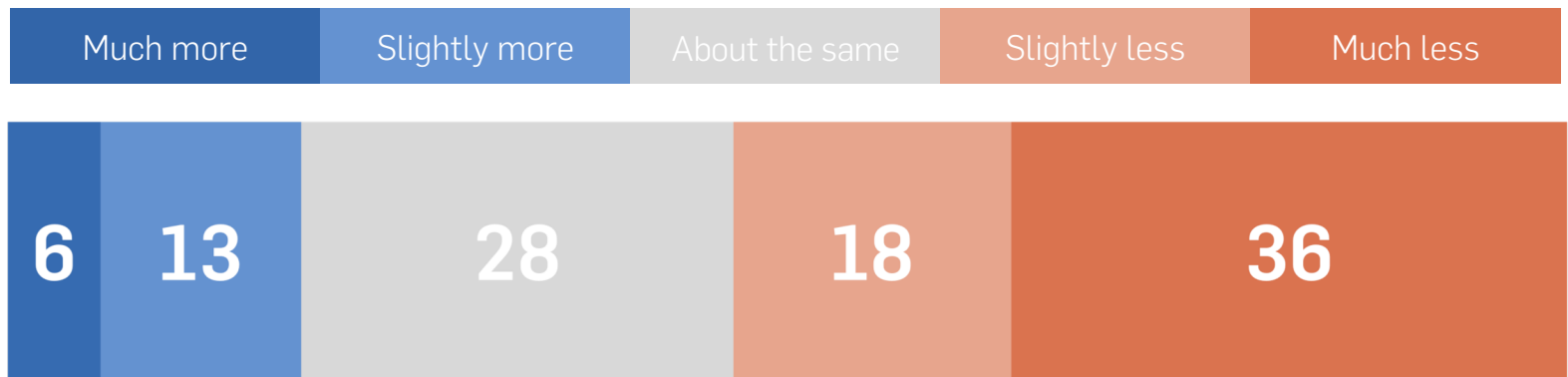
48% of respondents donated to support live entertainment, arts, or cultural events. Among those who donated, 54% said they donated less this year than in previous years.



Have you ever donated money to support live entertainment, arts, or cultural events in your area? (n=541)



DISPLAY IF QDONATE1 = YES. Now, thinking specifically about any funds you have donated to support live entertainment, arts, or cultural events in your local area during the past year-- would you say you have donated more, less, or about the same as you have in previous years? (n=279)

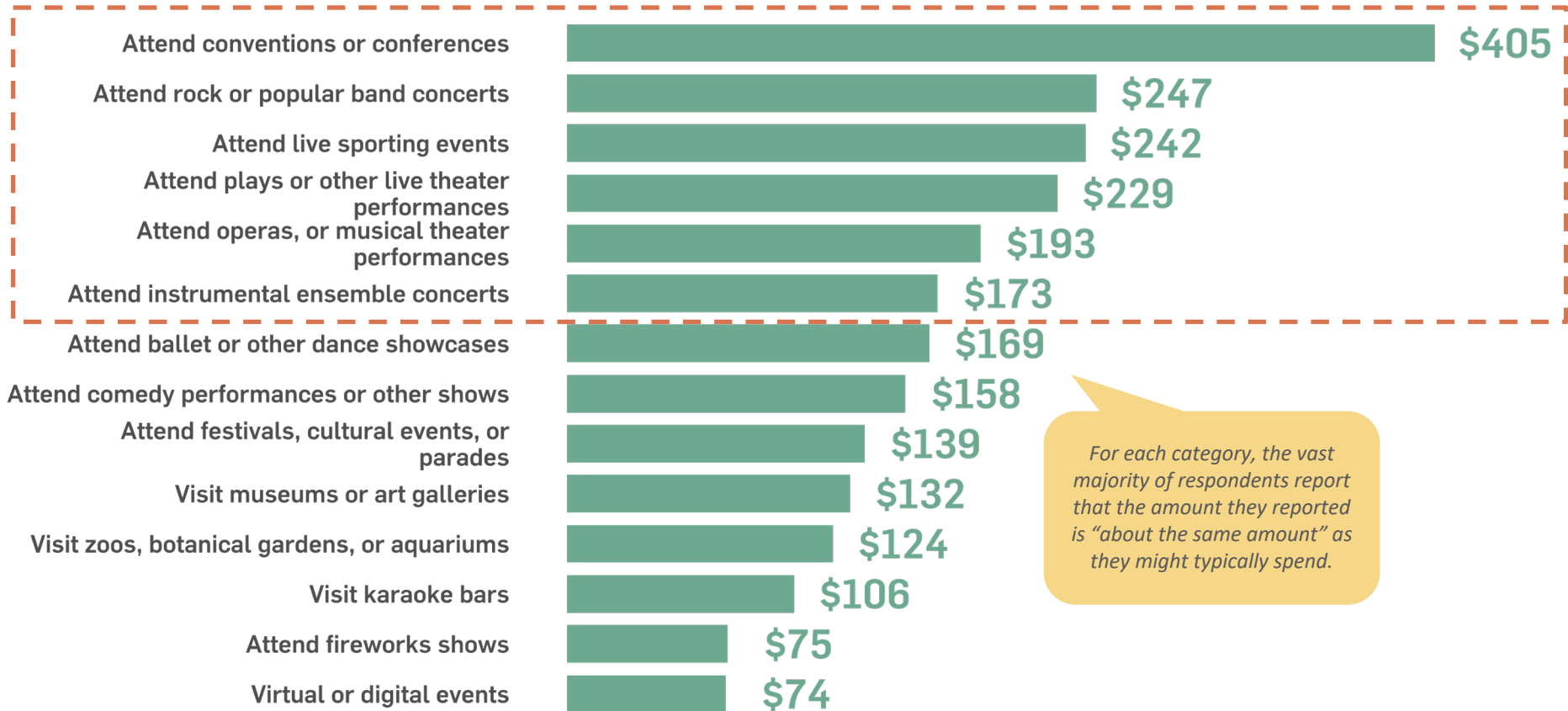


HIGHEST SPENDING CATEGORY IS CONFERENCES

Cultural event participants spend over \$100, on average, for many activities but they spend over \$150 for live entertainment activities and experiences and less than \$100 on virtual events or fireworks shows.



Thinking about the last time you participated in each of the following activities, about how much did you spend in total (including admission, concessions, merchandise, transportation, restaurants, etc.) on the outing? If you do not know the exact number, an estimate is fine. (n=11-145)

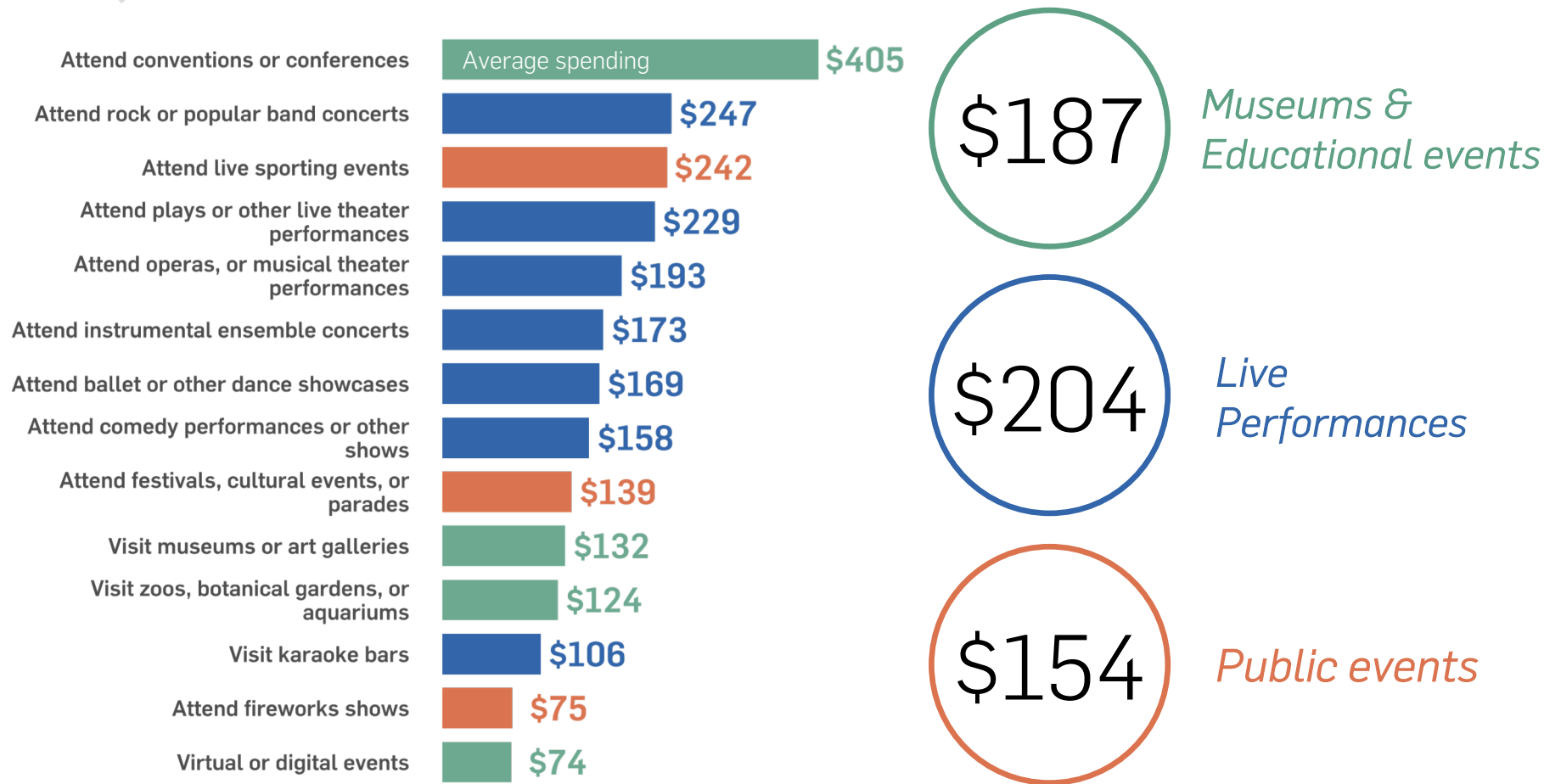


AVERAGE SPENDING EXCEEDS \$100

On average, participants spend \$204 when attending live performances. Spending at museums or educational events is close behind with an average spend of \$187 per event. Spending is lowest for public events such as festivals, parades, and sporting, with an average of \$154 spent per event.



Thinking about the last time you participated in each of the following activities, about how much did you spend in total (including admission, concessions, merchandise, transportation, restaurants, etc.) on the outing? If you do not know the exact number, an estimate is fine. (n=11-145)

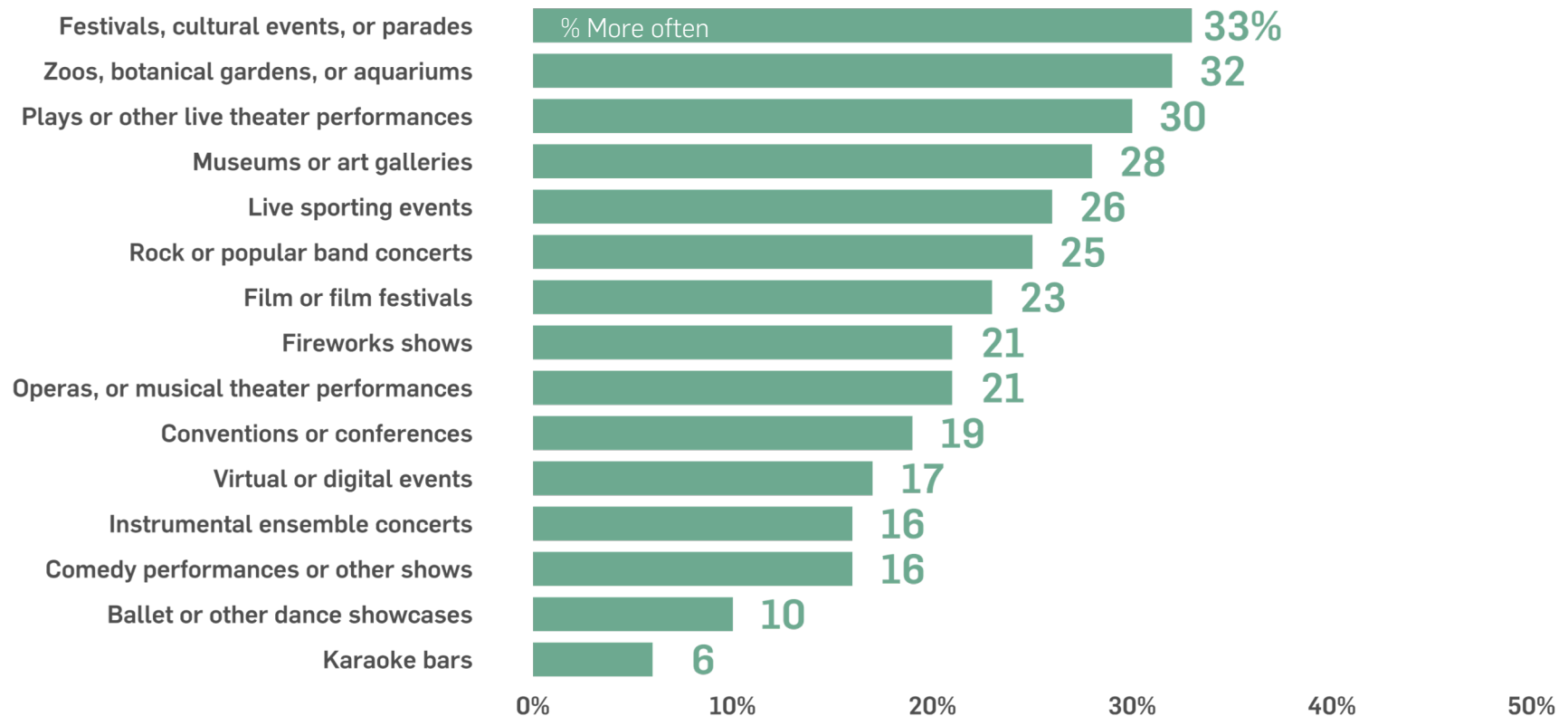


AUDIENCES ANTICIPATE VISITING ZOOS, FESTIVALS, AND LIVE THEATER MORE OFTEN

Consistent with other measures of enthusiasm, 30% or more SLCo residents say that they will attend zoos, botanical gardens, aquariums, festivals, cultural events, parades, and live theater performances more often after the pandemic.



Thinking ahead to when the current pandemic is over, do you anticipate participating in the following types of activities more often, less often, or about the same amount as you did prior to the pandemic? (n=313-452)

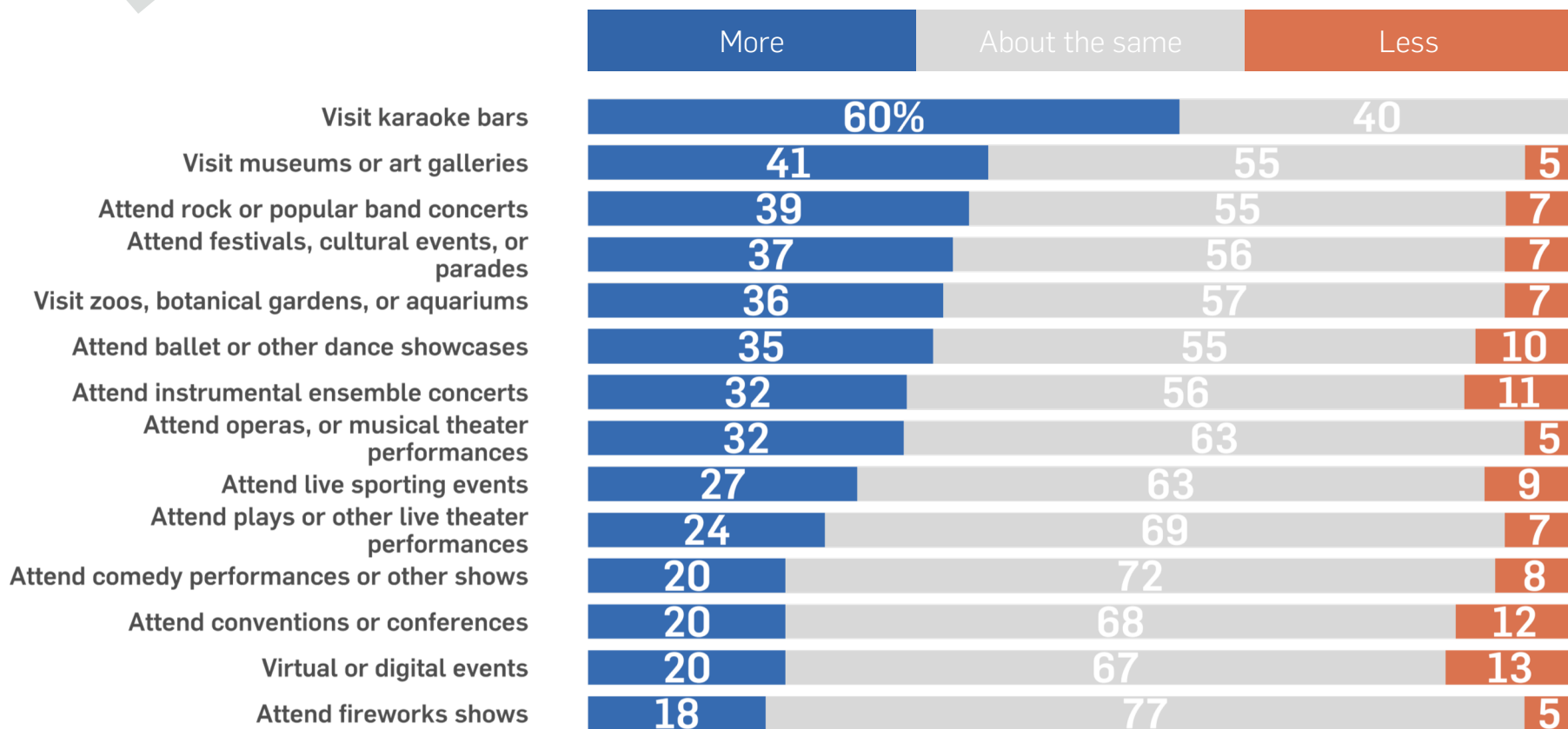


MANY VOTERS ANTICIPATE INCREASED SPENDING

When looking forward to when the pandemic is over, over a third of respondents say they will likely spend more when attending art museums, popular band concerts, festivals, zoos, and dance showcases than they did prior to the pandemic. Karaoke bars are the clear leader, however, with 3 in 5 (of those who visited bars before the pandemic) saying they will likely spend more when the pandemic is over.



And thinking ahead to when the current pandemic is over, do you anticipate spending more, less, or about the same amount as you did the last time you attended each of these activities?
(n=10-143)



PLURALITY WOULD NOT ATTEND EVENT REQUIRING COVID TEST

Just shy of half (45%) of SLCo respondents say they would not attend an event if it required testing. For those not deterred by a testing requirement, on-site testing is slightly preferred to prior testing with proof of negative test.



If an entertainment or cultural venue were to require all entrants to be tested prior to attending events, which of the following options would you prefer? (n = 473)

