



Phase IV: Market Research

Datafile Analysis

The consultants reviewed and analyzed the County's ticketing data to start to build a model of current arts audiences for both mapping and projections analysis. This work required assistance from County data administrators to determine what available data could help determine patterns and characteristics of current and future audiences and demand.

Next, the consultants reviewed and synthesized public data sets relevant to understanding County demographic and participation trends, including American Community Survey data. Over a period of several months, data was requested from a number of arts and culture organizations around Salt Lake County. The organizations were asked to provide data from approximately 2014 through 2019/2020 (tickets recorded in advance of shows). We successfully collected and incorporated data from 19 organizations:

1. Draper Arts Council
2. Grand Theatre
3. Pioneer Theatre Company
4. Odyssey Dance Theatre
5. SALT
6. Salt Lake Acting Company
7. Ballet West*
8. Utah Symphony and Opera *
9. Ririe-Woodbury Dance Company*
10. GAM Foundation*
11. Plan Theatre Company*
12. Pygmalion Productions*
13. Repertory Dance Theatre*
14. Broadway at the Eccles *
15. Utah Festival Opera*
16. Bachauer International Piano
17. Wasatch Speaker Series *
18. Sundance Film Festival
19. Utah Presents

There were varying degrees of detail in the data provided to Create Today, which doesn't allow for easy aggregation and comparison.

* Organization's marked with an asterisk provided their data through Salt Lake County's ArtTix program. Note that all major charts and maps focus on Salt Lake County patrons only.



Note that the following organizations were not included because their data was incompatible with the larger set (e.g., included attendance estimates or number of tickets available for sale rather than actual attendance, did not include years of ticket sales, did not include zip codes or greater detail about delineation between patron records and number of tickets to make an attempt to account for some duplication among records).

- Jaks Theatre Co
- Laughing Stock Improv
- Salt Lake Film Society
- Utah Arts Alliance
- Hale Centre Theatre

The data cleaning and prep process included cleaning and aggregating data across years for one organization, identifying potential duplicates within years, collapsing detailed variables for venue and genre, standardizing genre assignments across organizations (e.g., “drama” or “comedy” plays into “theatre,” assigning years and genres where necessary (i.e., where wasn’t included in data file but easily identifiable), isolating Salt Lake County Zip codes only, cross referencing and checking data at all stages to insure all transformations, contextual review of demographic data.

Demographic Profile

The dynamic changes that the Leadership interviewees felt is real – the population of Salt Lake County grew by almost 11% from 2010 to 2017 and the growth is continuing. In such a tight system such as Salt Lake County and Utah as a whole, this level of growth can feel more significant.

Some specific changes are that the population is aging: the 55- to 64-year-old age group increased by 27% and the 65- to 74-year-old age group increased by 45%. The population is getting more diverse in comparison to earlier generations, with the “other race” category increasing over 130%. Asian-identified residents increased by 37%, Black or African American increased by 28%, and Hispanic/Latino increased by 22%.

American Community Survey figures (2017 five-year estimates) describe Salt Lake County population as skewing young, White, highly educated and with higher income levels:

- 80% of residents are under 55 years old
- 80% of residents identify as White-only
- One-third of residents have a bachelor’s or graduate degree
- 30% of households earned approximately \$100,000 or more in the past 12 months

Higher education and income levels are strongly correlated with more active participation in benchmark arts activities (e.g., concert, theatre, museum attendance). This data supports the significant anecdotal evidence from the Leadership Interviews and the online audience/panel survey, which both indicated a high level of interest and support for arts and cultural activity in the County.



Table 1: Demographic Profile and Change from 2010 to 2017

SALT LAKE COUNTY DEMOGRAPHICS			
	2010	2017	Percentage Change
Total Population	1,000,155	1,106,700	10.7%
SEX/GENDER			
Female	50%	50%	10.9%
Male	50%	50%	10.4%
AGE			
Under 20 years	32%	31%	5.3%
20 to 34	25%	24%	4.2%
35 to 44	13%	14%	20.5%
45 to 54	12%	11%	2.5%
55 to 64	8.8%	10%	26.8%
65 to 74	4.6%	6.0%	44.5%
75+	3.9%	4.0%	12.9%
Median age	30.4	32.4	10.7%
RACE/ETHNICITY (one or in combination)			
White only	89%	83%	3.5%
Black or African American	2.0%	2.3%	27.7%
American Indian or Alaska Native	1.3%	1.4%	18.8%
Asian	4.0%	5.0%	36.8%
Native Hawaiian or other PI	1.9%	2.2%	24.1%
Some other race	4.5%	9.6%	136.2%
Hispanic or Latino (any race)	16%	18%	22.0%
EDUCATION (pop 25+)			
Less than high school	11%	10%	1.7%
High school or GED	24%	23%	6.7%
Some college	26%	25%	10.9%
Associates degree	8.5%	8.9%	19.9%
Bachelor's degree	20%	21%	24.4%
Grad or Prof degree	10%	12%	36.3%
HOUSEHOLD INCOME			
Less than \$15,000	9%	8%	-9.7%
\$15,000 to \$34,999	18%	15%	-10.5%
\$35,000 to \$49,999	15%	13%	-10.3%
\$50,000 to \$74,999	21%	20%	2.7%
\$75,000 to \$99,999	14%	15%	12.9%



\$100,000 to \$149,999	14%	17%	29.0%
\$150,000 or more	7.7%	13%	81.5%
HOUSEHOLDS & FAMILY SIZE			
# households	335,075	363,058	8.4%
Average household size	2.94	3.01	2.4%
#family households	236,504	255,828	8.2%
Average family size	3.53	3.58	1.4%

The chart below gives a sense of the trajectory of growth, as projected by Gardner Policy Institute at the University of Utah. Salt Lake County is estimated to grow by 55% to over 1.5 million people in the next 45 years. However, this is not the fastest growing county in Utah.

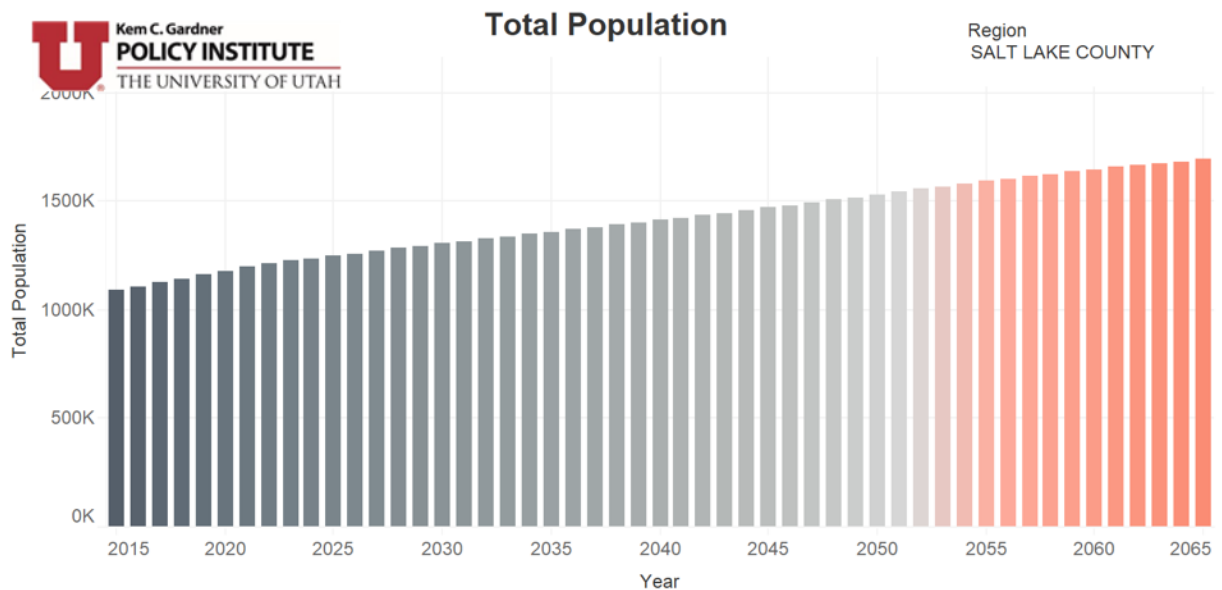


Figure 1: Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections;
<https://gardner.utah.edu/demographics/population-projections/>

Utah and Wasatch and Juab counties are estimated to grow by over 170% in the next 45 years (see figure below).

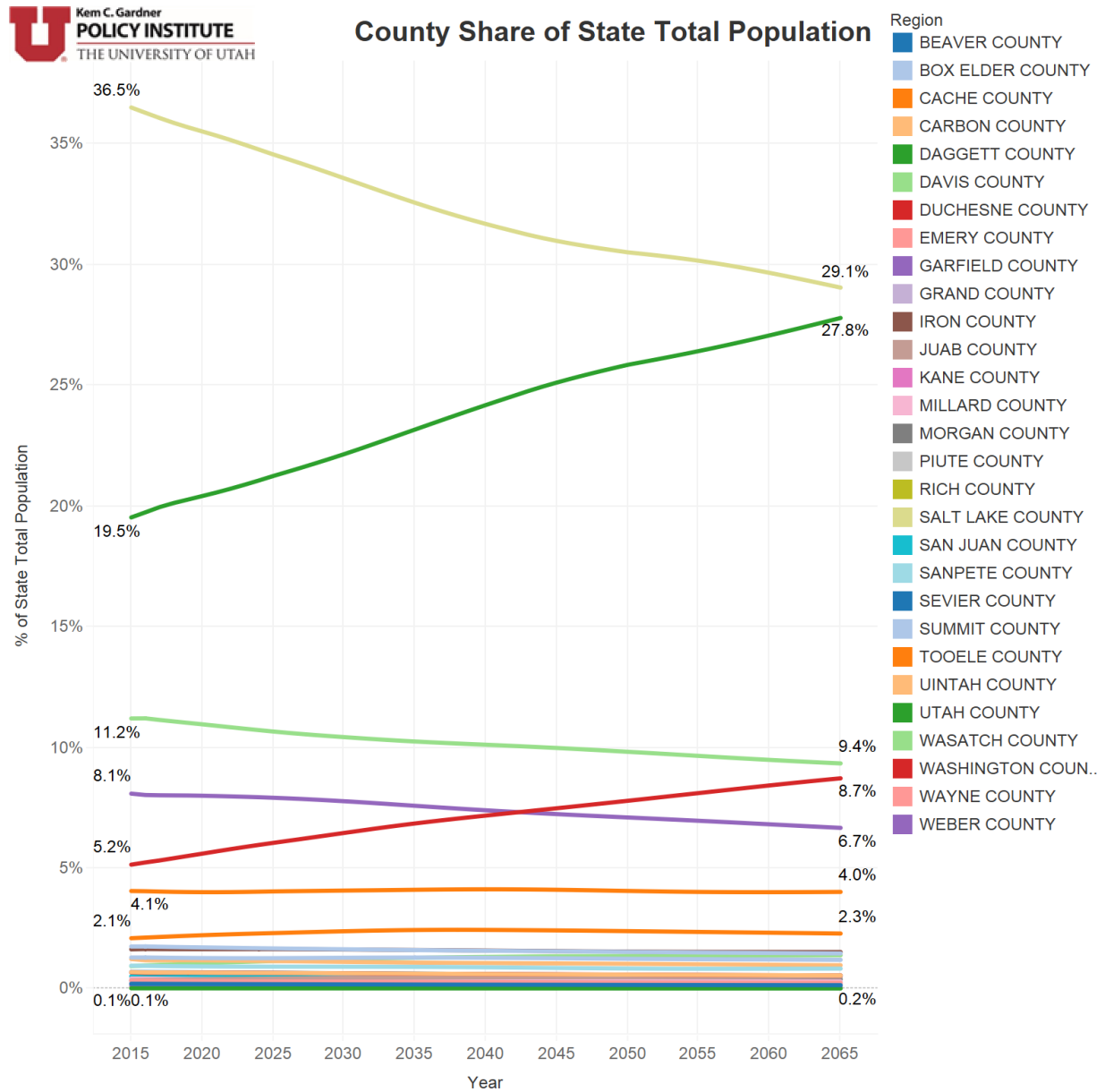


Figure 2: Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections;
<https://gardner.utah.edu/demographics/population-projections/>



General Geographic Distribution of Ticket Buyers

Figure 3 shows the basic counts of patrons for whom we have some location information. It compares the count of records by year for Salt Lake County (orange line) and all Utah (pink line).

The jumps of numbers from year to year reflects the popularity of programming presented, in particular around musical productions.

Overall, there is a relatively consistent upward trend from year to year, especially recognizing that many organizations' seasons span the calendar year. From 2014 to 2019, the patron base within Salt Lake County residents has increased 233% (329% for Utah state residents overall).

The significant spike in 2017 is likely attributable to the opening of the Eccles Theatre in 2016/2017. Salt Lake County facilities draw audiences from all over the state, but the majority of Utah buyers live in Salt Lake County (Figure 4).

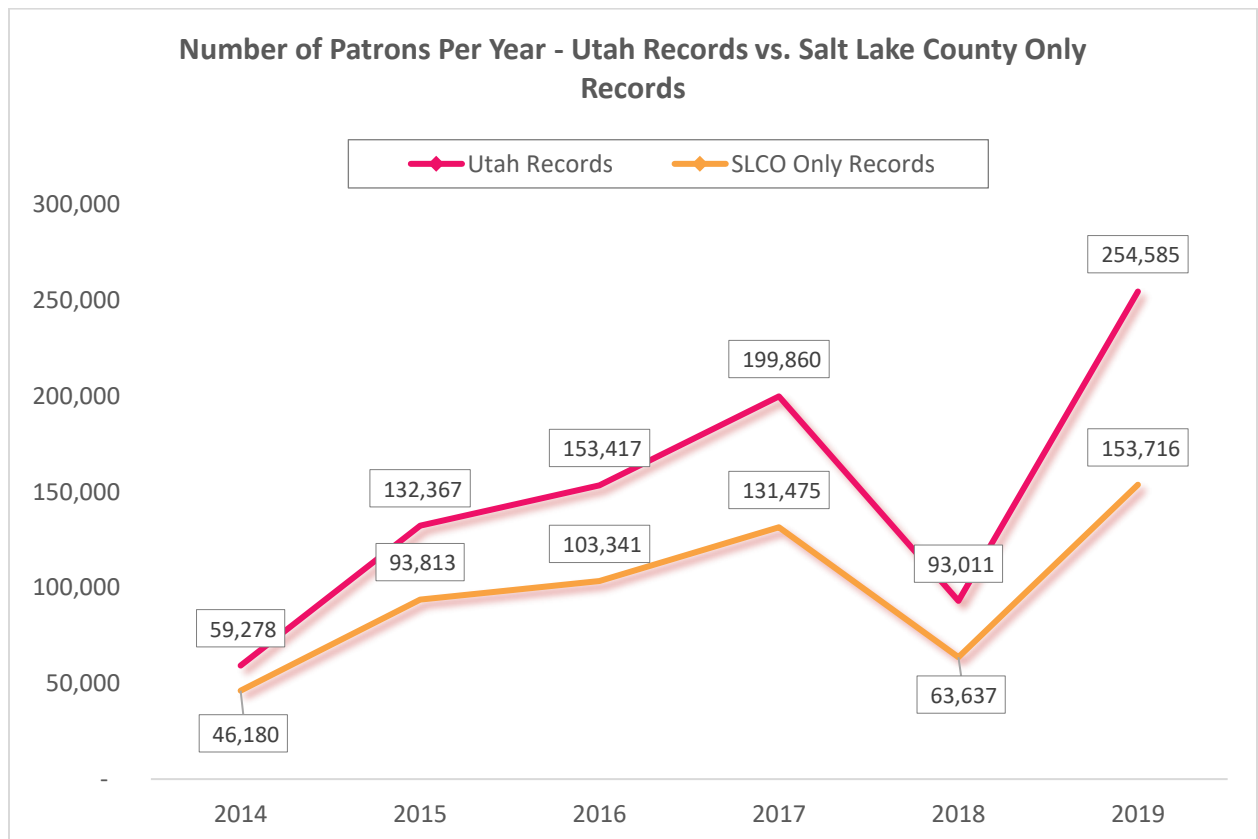


Figure 3: Total Number of Patrons by Year, Comparison of Utah and Salt Lake County records

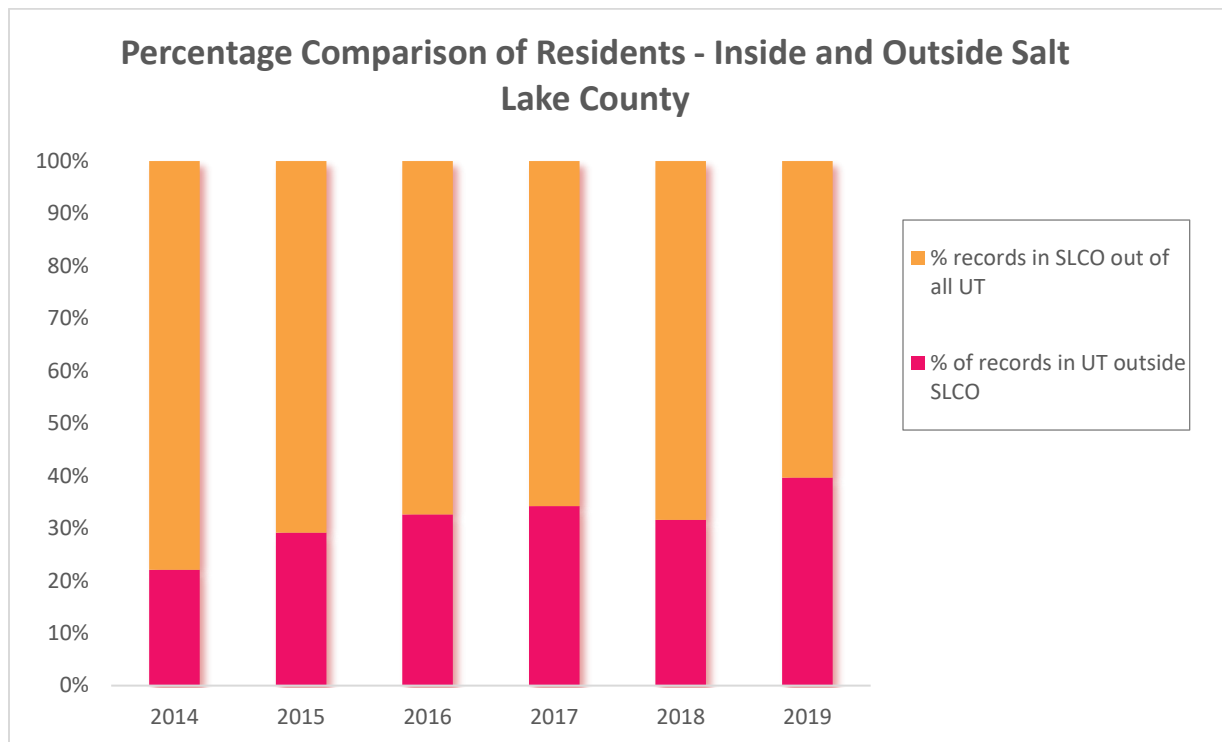


Figure 4: Percentage comparison of Salt Lake County and Utah patrons

Top Ten Zip Codes by Year

Over the past five years, these have been the top Zip codes, in terms of buyers from the data files that were provided for this analysis:

84103
84108
84121
84105
84109
84106
84117
84124
84102
84101
84020

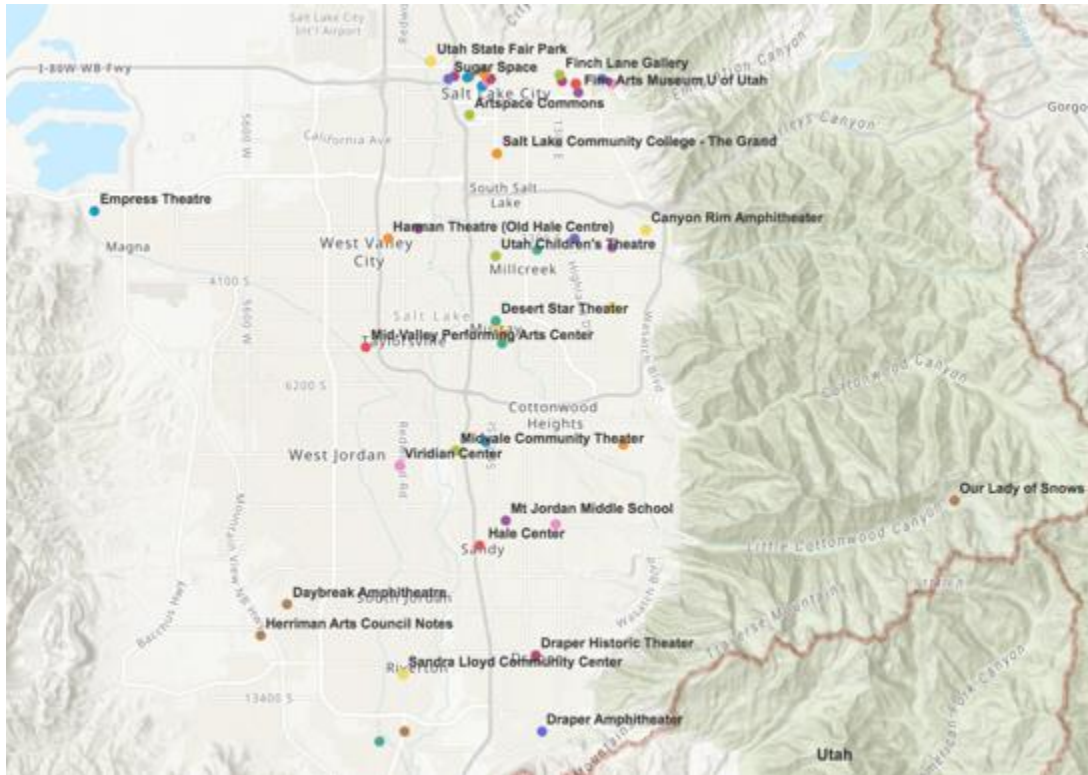
Overall, the distribution of sales between each of these Zips is relatively stable from year to year, as result of a stable subscriber base.

Note that all maps and figures to follow in the report focus on Salt Lake County Zip code records only.

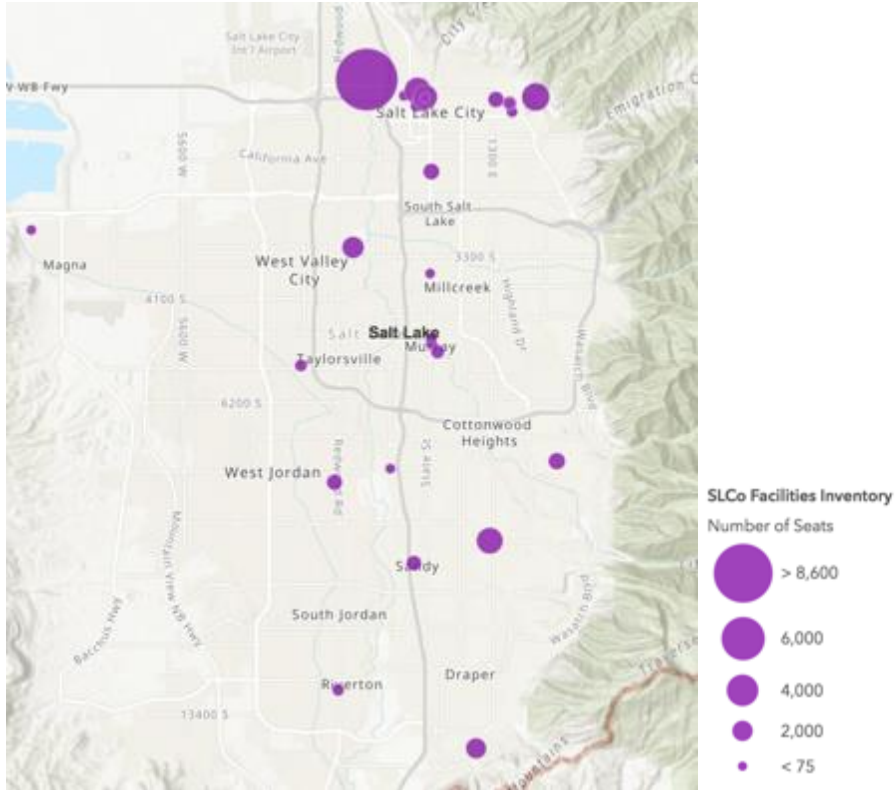


Facilities Distribution

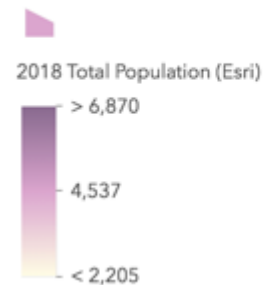
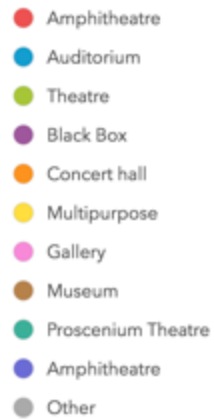
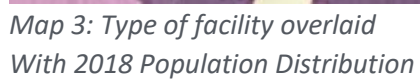
We created a series of maps to visually represent the distribution of facilities included in the facilities needs assessment workbook. Maps were created to show where facilities are by name, by type of facility and by number of seats (if data was available). Overall the mapping exercise confirms how the largest facilities are located in the downtown center.



Map 1: Facilities by Organization/Venue Name



Map 2: Facilities by Number of Seats





Geographic Distribution

Overall attendance patterns for major Salt Lake County performing arts haven't changed dramatically over the past five years, with the exception of expansion in 2016/17 and specific popular musical productions (see series of maps in Figures 5-10).

The main changes are in the ebb and flow of buyers from across the county. We see this in the 2017 and 2019 distributions, with larger representation from further out west (e.g., Magna), and southwest (South Jordan and Riverton).

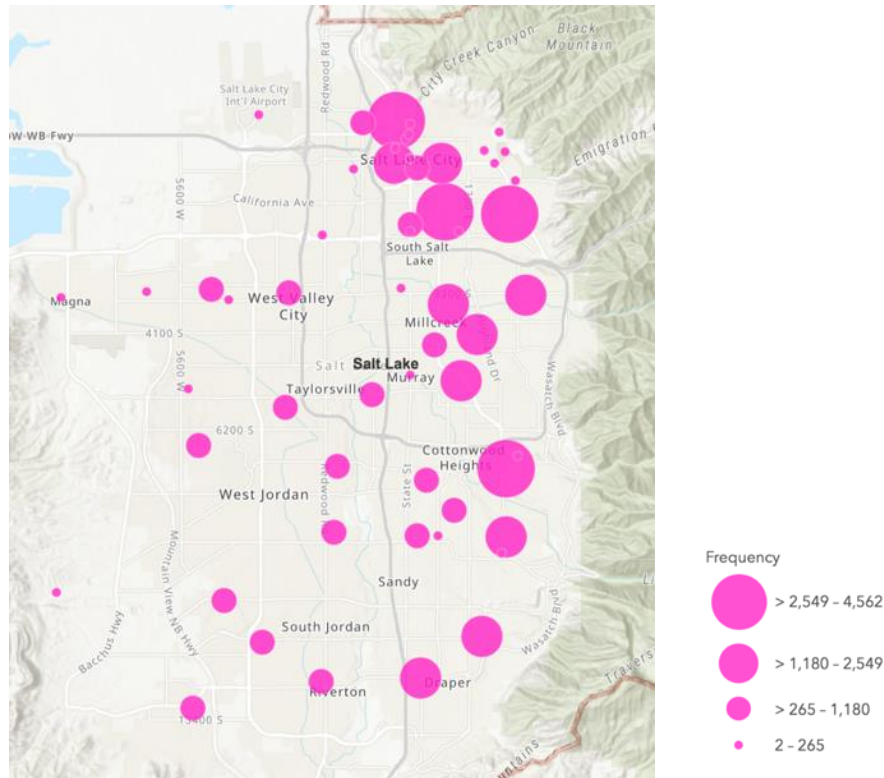


Figure 5: 2014 buyers (all participating organizations)

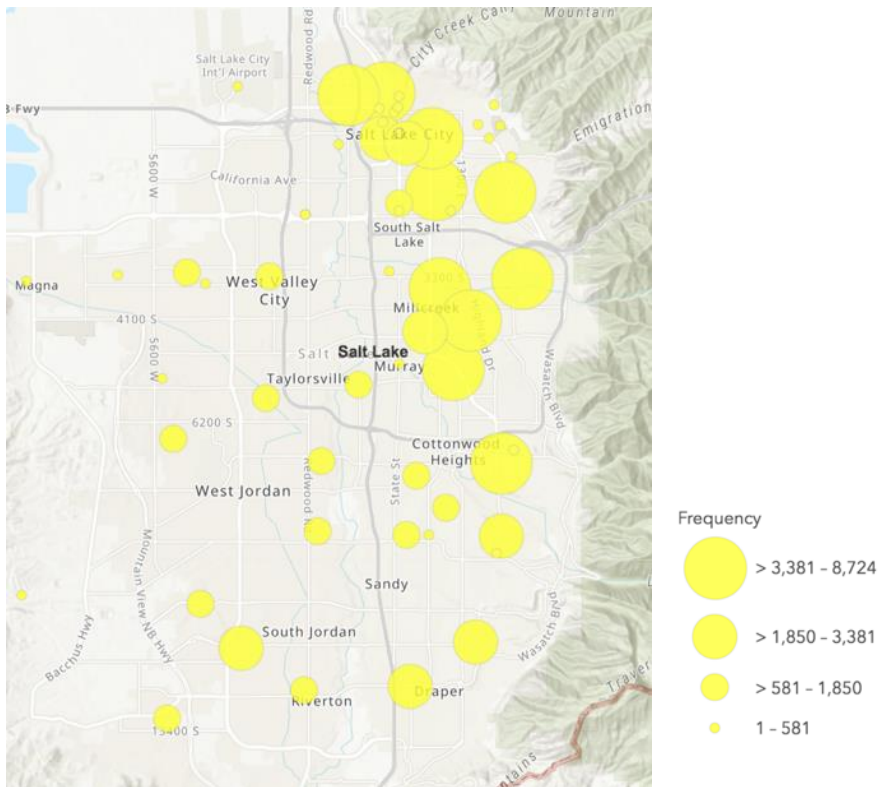


Figure 6: 2015 buyers (all participating organizations)

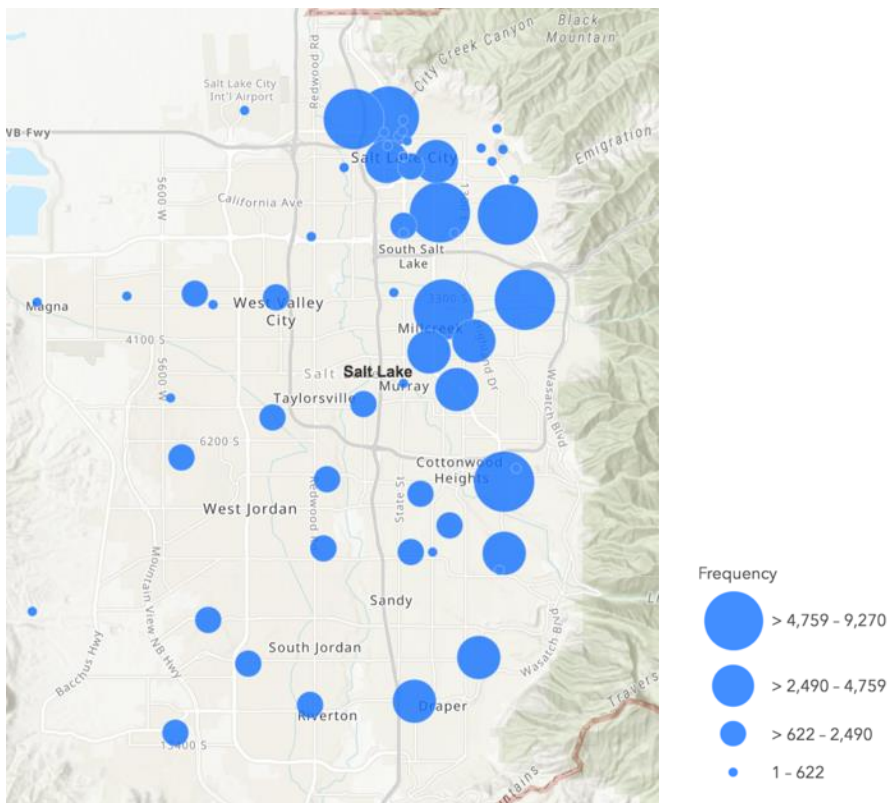


Figure 7: 2016 buyers (all participating organizations)

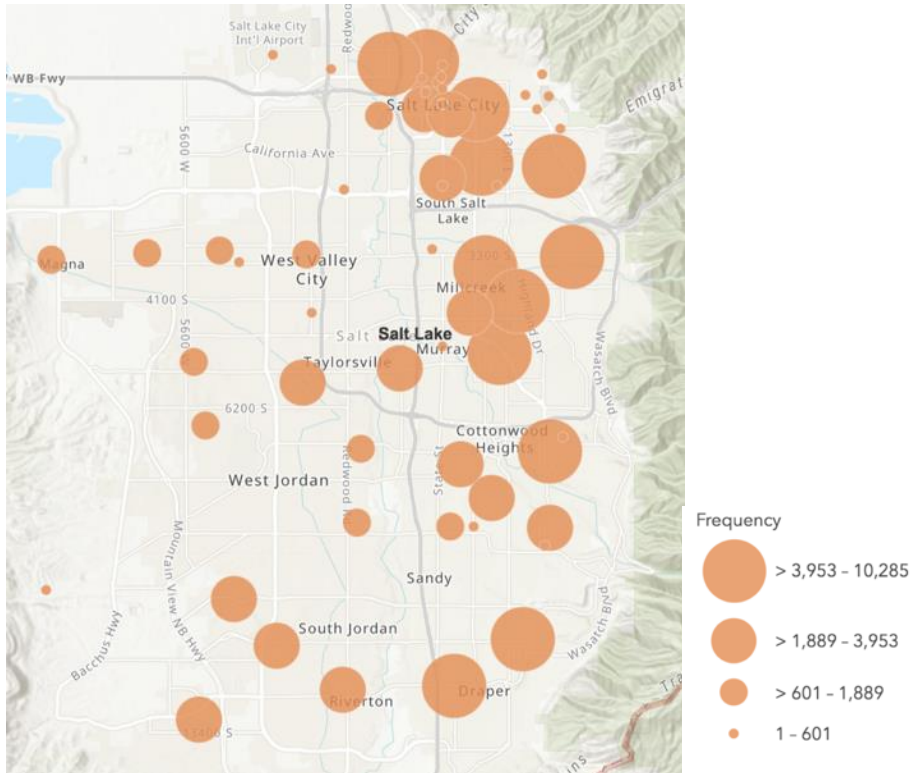


Figure 8: 2017 buyers (all participating organizations)

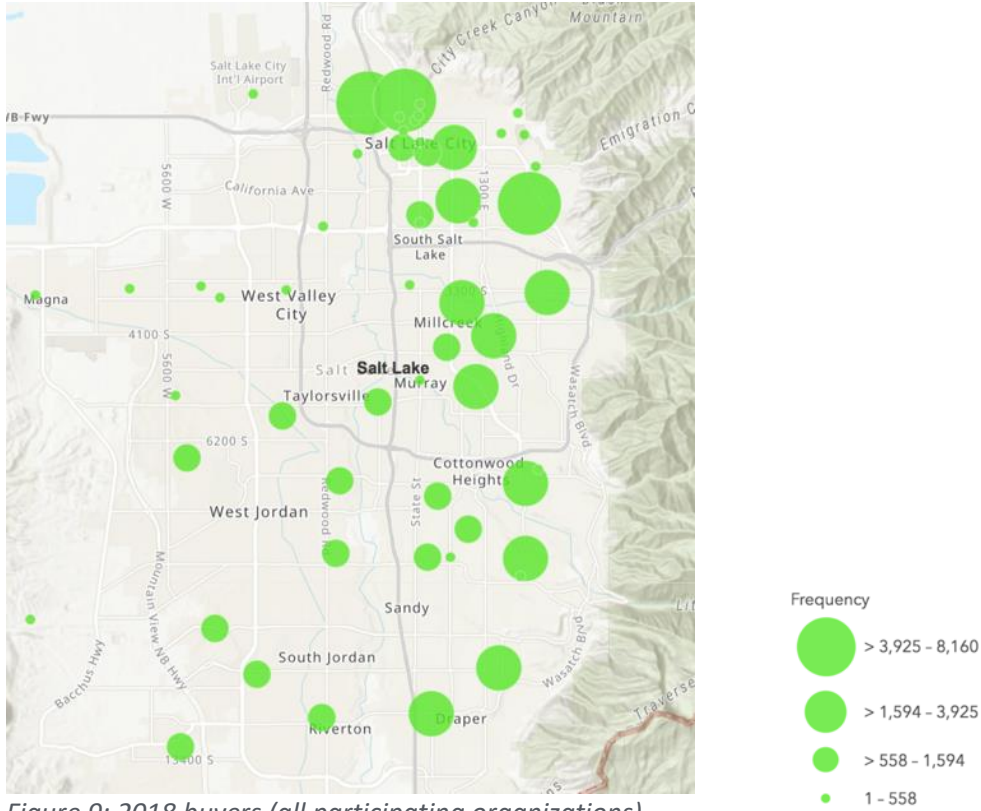


Figure 9: 2018 buyers (all participating organizations)

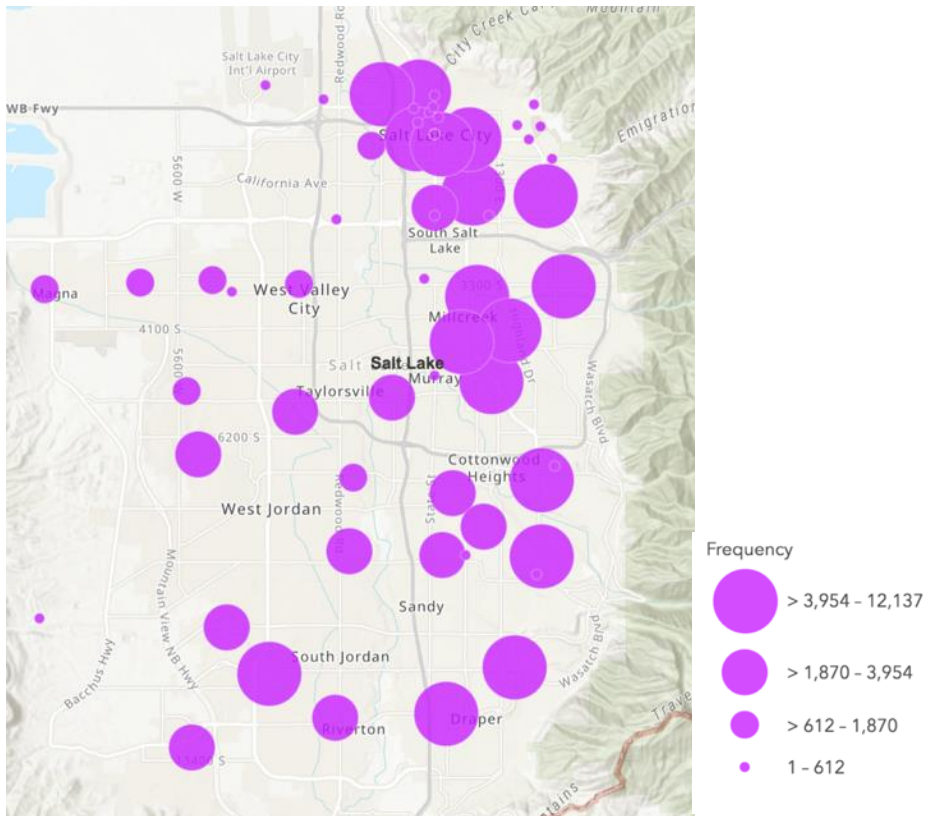


Figure 10: 2019 buyers (all participating organizations)



Ticket Type

The Salt Lake County Art and Culture's database is split relatively evenly over the years between subscribers and single ticket buyers, with the exception of 2017, with the introduction of first-run Broadway at the Eccles. Figure 11 below shows the uptick of single ticket buyers in 2017 (64% up from 48% in 2016) as a proportion of total buyers. In 2018, that percentage falls again to 46%, the overall average proportion of single ticket buyers over the past five years. In 2019, that percentage increased again back up to 2017 levels.

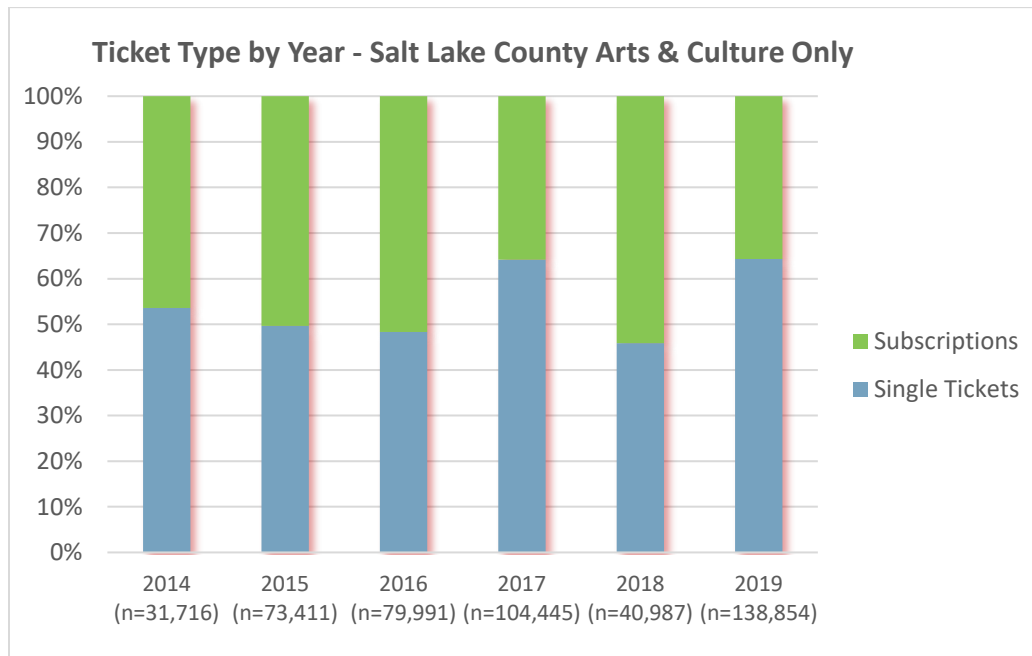


Figure 11: Percentage of Buyers by Ticket Type and Year for Salt Lake County Arts and Culture

Grand Theatre's ticket buyer base, comparatively, consists primarily of single ticket buyers (see Figure 12 below; between 84% and 92% of buyers from year to year are single ticket buyers compared to season ticket holders). This multi-disciplinary presenter and producer relies heavily on single ticket sales and is likely representative of many mid-size to small organizations' client base (i.e., skewed towards single ticket buyers vs. subscribers). What this means is that organizations such as the Grand Theatre, are subject to more variability in income which rides on the popularity of single offerings rather than the season as a whole.

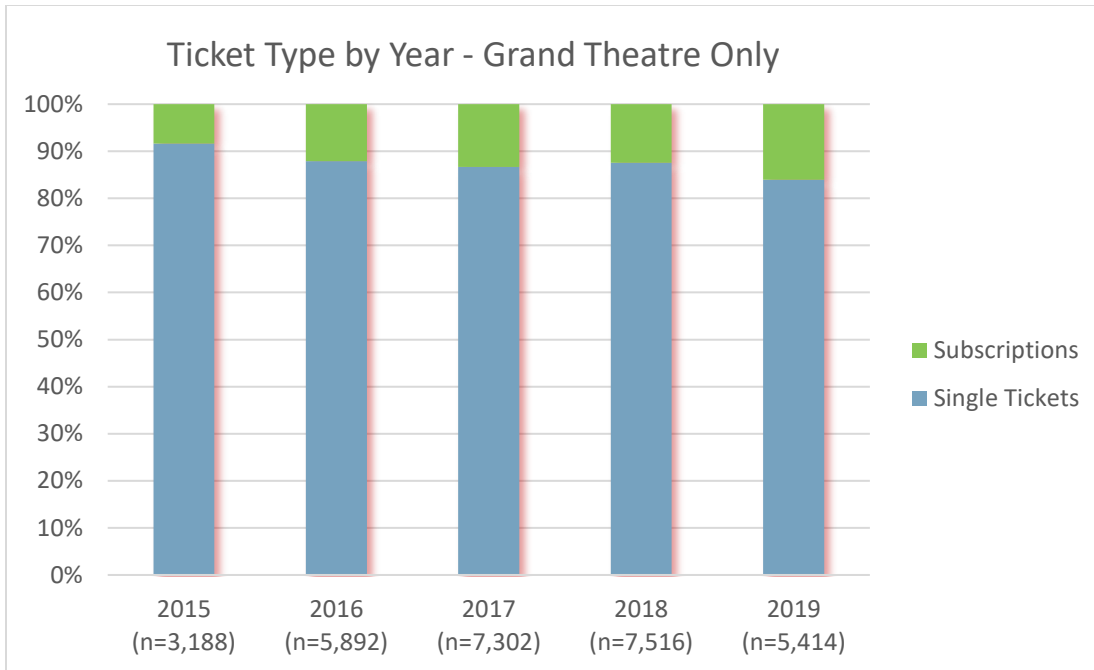


Figure 12: Percentage of Buyers by Ticket Type and Year for Grand Theatre

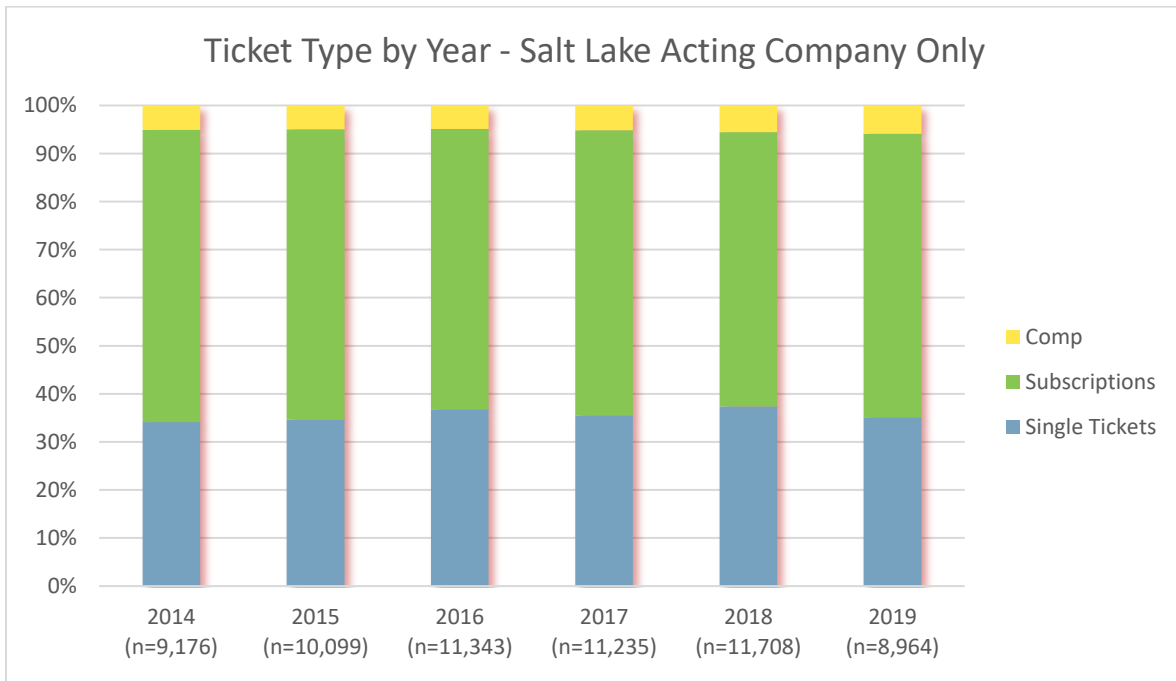


Figure 13: Percentage of Buyers by Ticket Type and Year for Salt Lake Acting Company

Figure 13 above is a third perspective on distribution of ticket types within an organization. Salt Lake Acting Company has a strong subscription base, with an average split of 54% to 40% subscribers to



single ticket buyers over the past five years. In addition, approximately 6% of each year's tickets are complimentary tickets.

Note that the raw number of buyers over the years has remained consistent and slightly increased from 2017 to 2018 (within the first year of Eccles opening).

Venue

Figure 14 below shows the distribution of buyers across select venues (i.e., the most "populated" venues within the overall analysis) across the County by year. Like the significant jumps observed in previous analyses between 2014 and 2017, the introduction of Delta Hall and the Eccles Theatre shows the draw for the majority of patrons included in this analysis from 2017 onward. Note that the big Broadway musicals are presented in Delta Hall, and so genre and venue go hand and hand in terms of trends.

Prior to the opening of Eccles, Abravanel Hall and Capitol Theatre were primary venues at the County, followed by SLAC's Upstairs Theatre. Although buyers attending events at Capitol Theatre and Abravanel Hall decreased as a proportion of overall buyers in 2017, it's interesting to observe how both increased in 2018, but decreased again in 2019. It is likely that the data from 2019 is a good proxy for what an average attendance per venue in a regular and stable year will look like.

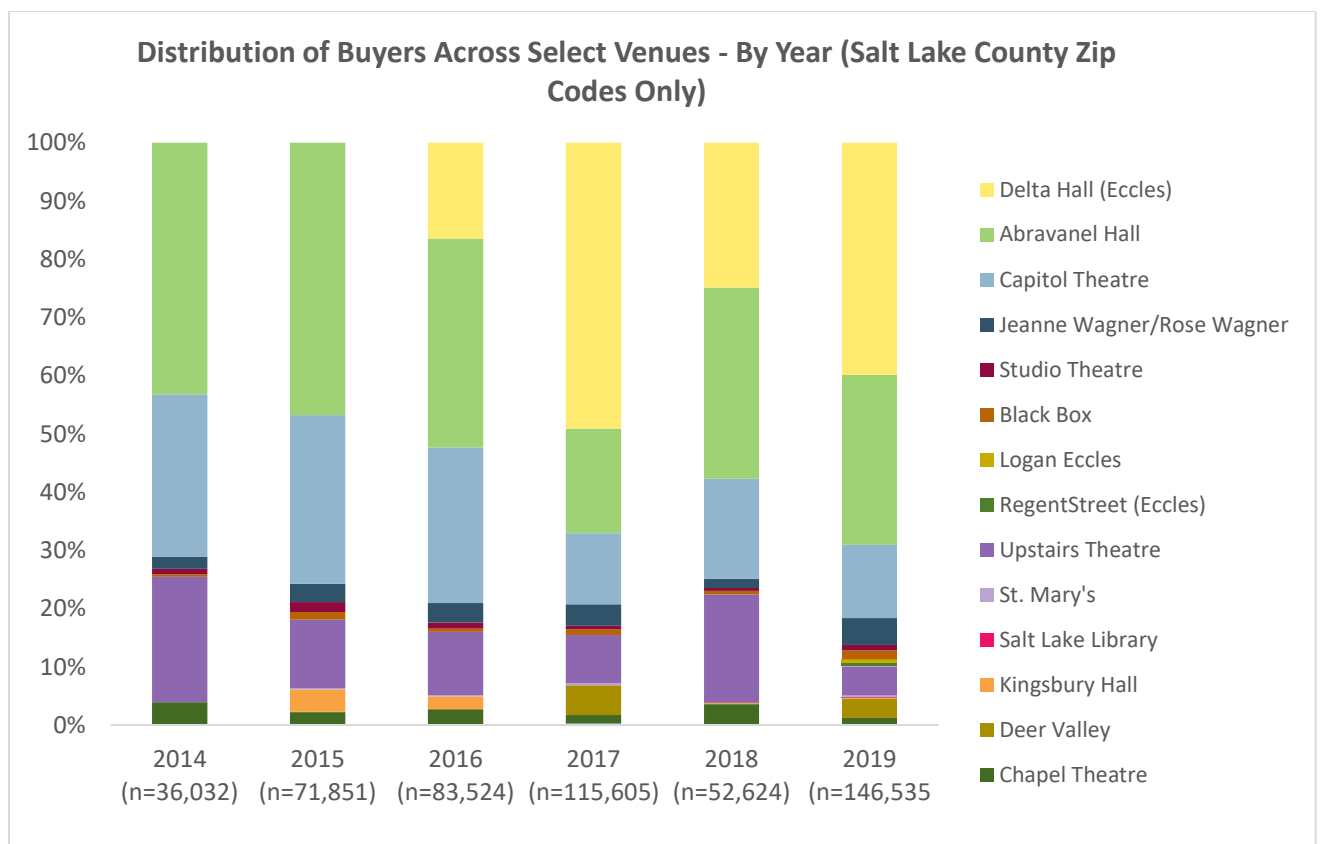


Figure 14: Percentage of Buyers by Venue and Year



Genre

Figure 15 below describes distribution of buyers across major genres (note that some individual performances are labeled as miscellaneous as part of multidisciplinary series and include concerts, musicals and opera). An important caveat is that this dataset does not fully represent the diversity of arts and culture offerings, as we are only representing the data available to us at the time of analysis. This chart shows by calendar year as opposed to season, so it's not necessarily representative of a seasons' programmatic or audience make-up.

The three most prominent genres are symphony concerts, musicals and ballet, followed by theatre. Concerts, also a strong showing, primarily represents solo artists and special presentations. The increase of buyers attending musicals increased significantly in 2017, as the Eccles brought big musical blockbusters, including *Wicked* and *The Book of Mormon* (from 22% of buyers in 2016 to 33% in 2017, an increase of 50%). Again, we recommend looking to 2019 as what a typical and stable distribution of buyers would look like, especially those attending programs at County facilities.

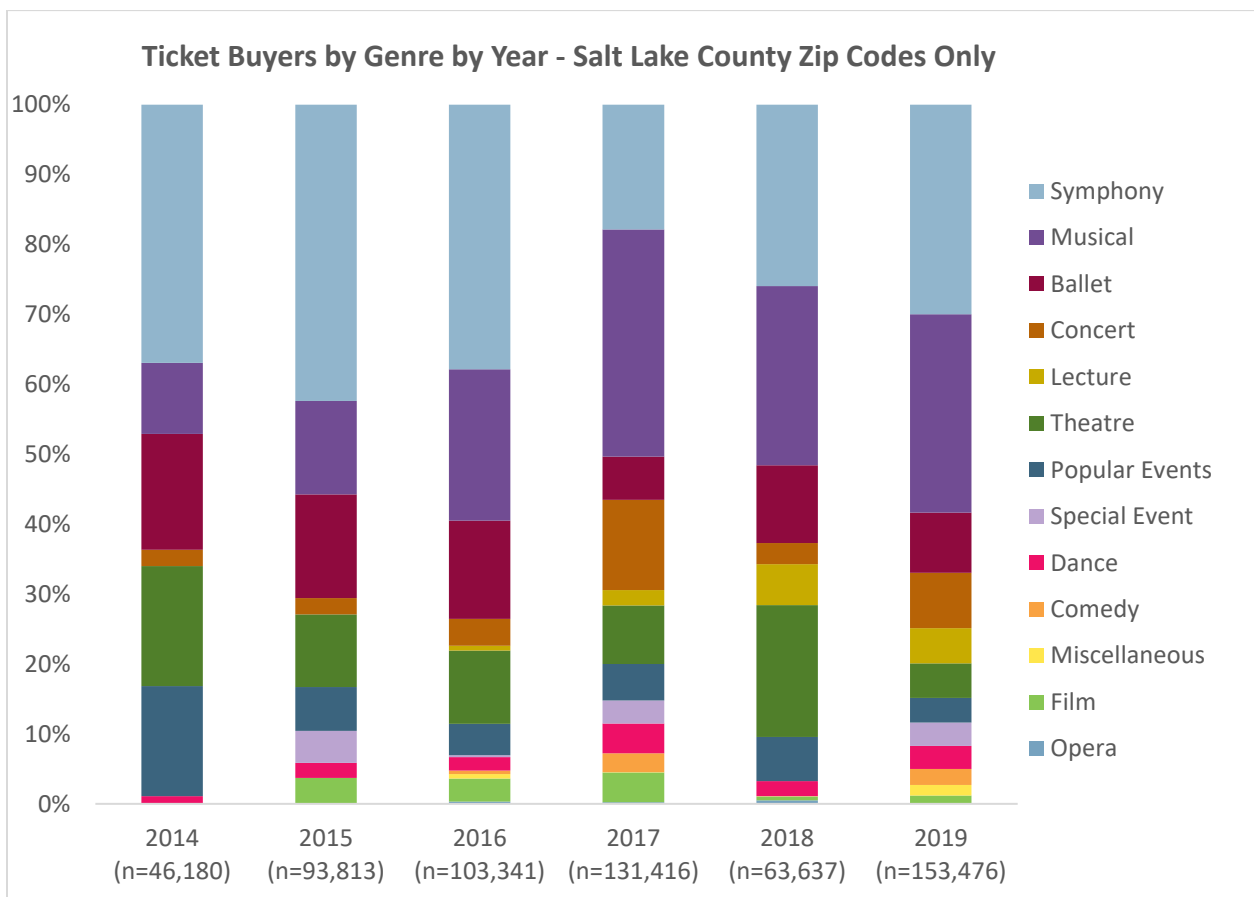


Figure 15: Percentage of Buyers by Genre and Year



Organization/Series

Figure 16 displays distribution of buyers for each participating organization, with Salt Lake County Arts and Culture broken into its most representative series and resident companies. Organizations showing all 100% of buyers only in 2019 (purple bars) were likely only able to provide data for one year. In other words, they likely have buyers from previous years, but we are unable to analyze since we only had 2019 data. This should not be taken as a true reflection of their attendance in prior years.

The key comparisons here are focusing on Broadway at the Eccles, with a total of 148,965 purchases across all years, and Utah Symphony and Utah Opera (combined), with a total of 188,746 purchases over the five studied years. Figure 17 highlights changes observed in sales over the past five years between Broadway, Utah Symphony and Opera (USUO), Ballet West (BW), and Salt Lake Acting Company.

The opening of the Eccles Theater, with its greater seat count, had an impact on sales of the organizations represented in this sample.

US sales in 2017 make up 16% of total sales over the five years, compared to 21% in 2016. All sales across all organizations fell in 2018 (unknown and external factors likely influencing these outputs). However, by 2019, sales recovered and even came back stronger, making up 25% of all sales over the five years. Of course, total sales are always a reflection of repertoire, and as US diversifies its offerings it will likely continue to increase sales in subsequent years.

Ballet West experienced a similar trajectory to US.

Salt Lake Acting Company, on the other hand, maintains its sales at a steady amount through the past five years. The proportion of buyers are relatively evenly distributed over the years, which suggests that it wasn't affected by the opening of the Eccles. This may also be due to its strong subscriber base (see discussion above about ticket type), who are more likely to stay loyal to an organization regardless of other offerings in the market.

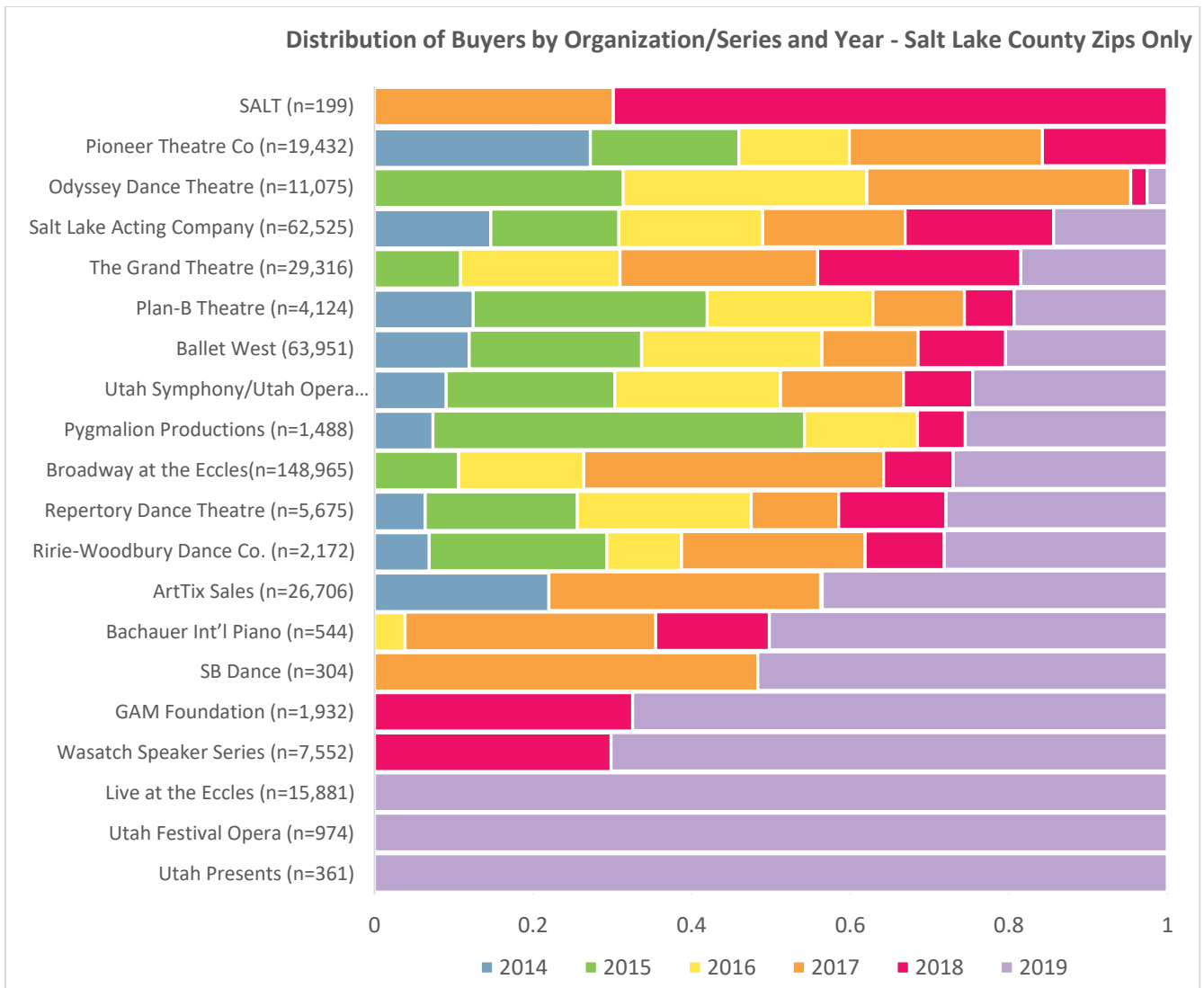


Figure 16: Distribution of Buyers by Organization and Series and Year

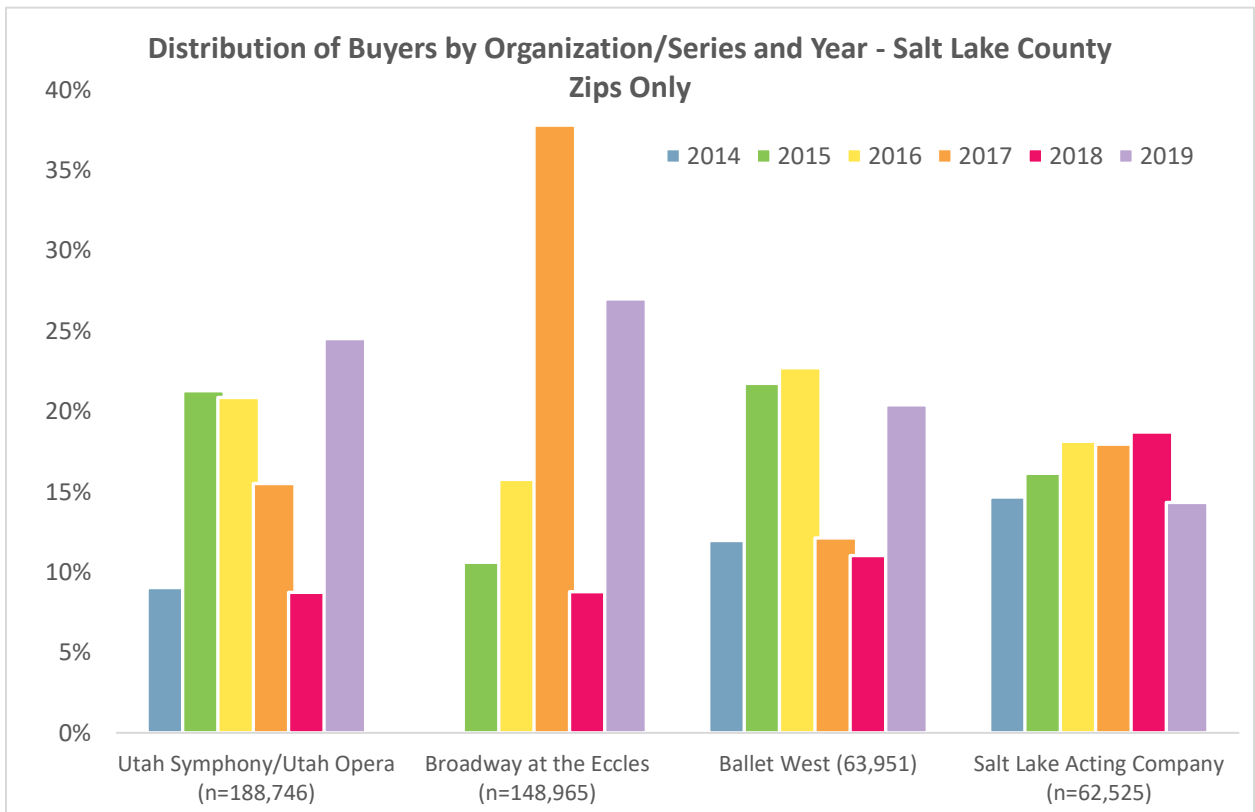


Figure 17: Distribution of Buyers by Year Detailed Comparison

Concluding Thoughts

Through the review of the database of select performing arts organizations by location and year, genre and venue, we are able to develop the following theories:

- A. Currently, it is not possible to conclude that demographic shifts have affected attendance or attendance patterns (geographically or otherwise) based on the currently available data. However, it is important to note changes for future consideration and planning.

Demographic changes in the county have increased with regard to race/ethnicity and age between 2010 and 2017. Although the majority of the county's population remains White, older, and with higher education and income (all fitting within the traditional arts audience member profile), the changes observed through the data, as well as anecdotally from leadership interviews and the survey, is a trend that the county should observe and be prepared to address now and in the immediate future. As populations diversify, the types of cultural activities, and possibly the types of facilities (e.g., smaller to mid-size and more multi-use to accommodate a range of activities across cultural references) will meet a future need.

In addition, Salt Lake County, while growing in population size like the whole of Utah, is not growing as fast as other counties.



- B. Overall, attendance (within the current analyzed sample) has been on a relative increase year by year until a peak in 2017 with the opening of the Eccles Theater. A dip in 2018 (caused likely by external factors) was met with a return to normal levels in 2019*.

Salt Lake County residents make up over half of all Utah buyers, and so it is safe to conclude that at least county facilities reach beyond county boundaries, but still rely on the bulk of attendance from county residents. Ten zip codes account for between 50% and 60% of all sales, on average from 2014 to 2019. This is likely a function of a stable subscriber base.

The geographic distribution of buyers has always remained the same in the past five years, with increasing representation from western cities like Magna, and southwest cities like South Jordan and Riverton in 2017 and 2019 (likely a function of blockbuster productions). This bodes well for the future expansion and reach of county facilities and Salt Lake-based repertory in that residents are traveling from further out to attend desirable shows.

- C. The introduction of the Eccles Theatre did have an impact on the distribution of buyers by genre, by venue and by organization. However, overall, it appears that the programming at the Eccles has increased the overall size of the audience for arts and cultural programming.

Before the Eccles, most county audiences attended programs at Abravanel Hall and Capitol Theater. Since 2017, Eccles attracts the highest proportion of ticket buyers; however, Abravanel Hall has rebounded from its 2018 dip and now is on close to equal footing with the Eccles.

Similarly, symphonic music, as represented by the US, was the predominant genre represented in the county's repertoire programming until 2017. Although the US's sales, as a percentage of their total across all five years, dipped in 2017 (and 2018 like others), they did come back in 2019 to reach a state of equilibrium that matches previous years.

All in all, the impact of the Eccles on attendance has not fully been experienced. However, the 2019 calendar year data suggests that a state of equilibrium has started, and will continue to even out sales, returning to similar distributions observed before the Eccles opened. The key difference here is that the new equilibrium state accommodates a larger audience overall. In 2019, US recorded a total of 46,298 Salt Lake County resident sales, compared with 29,289 in 2017, and 39,414 in 2016. That is a 58% increase in 2 years, and a 17% increase from 2016.

* Data from 2020 was incomplete and so not included in the final reporting.