



Phase IV: Market Research

Organization Survey

Starting in November 2019, Create Today LLC administered an online survey to Salt Lake County and Millcreek-based artists and organizations. Our goal was to gain a better sense of their current facility use and future facility needs, as well as to gather input and feedback on the County's working vision and strategies for the master plan.

The survey was launched via an email blast to approximately 170 contacts on November 13, 2019. Throughout December, the County followed up with reminders to key organizations and contacts. The survey was closed in early January 2020 to allow for delays due to the December holiday break. A total of 63 completed surveys were collected (approximately 37% response rate based on original contact list). Of the 63, 35 represent arts organizations, and 28 were individual artists. There were also an additional 250 partially completed responses that are not included in this reporting. The large number of partial responses can be attributed to the intensity of the survey which posed detailed questions about facility use, cost, space. Many of the potential respondents had participated already in other components of the work such as the leadership interviews and focus groups.

It's important to keep in mind that the findings are representative of the types of organizations and artists who responded. In particular, the sample is heavily weighted towards performing arts organizations and individual visual artists. Therefore, many of the differences between individual artist needs and organizational needs are in line with the needs of their particular artistic discipline.

This report represents a summary of findings, with distinct comparison of results between organizations and individual artists, across disciplines, and by primary location of practice. Overall, the results support the reflections and implications from both leadership interviews and facilities assessment.

Breakdown of Participants

The 35 completed surveys are comprised primarily of performing arts presenters or producers (31%), followed by arts councils (17%) and a mix of other types of organizations and arts education organizations. Organizations could select multiple categories, and many did. For example, film organizations self-identified as either festivals and/or arts education and other types of organizations. See Figure 1.



Further breakdown of participants describes primary discipline for each organization as well as artist (see Figure 2). Overall, the visual arts discipline is primarily represented through visual artist respondents (71% of individual artists identified visual arts as their primary discipline), which is relevant in reviewing and explaining differences between organizations and individual artists around facility needs discussed later in this document. Organizations, in comparison, represent a mix of performing artist

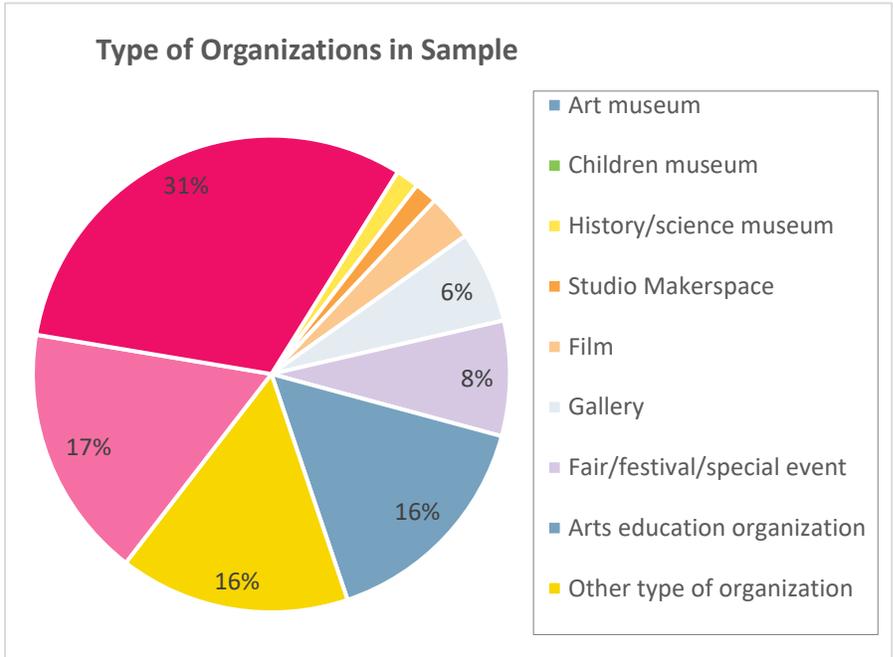


Figure 1: Type of Organization (self-identified)

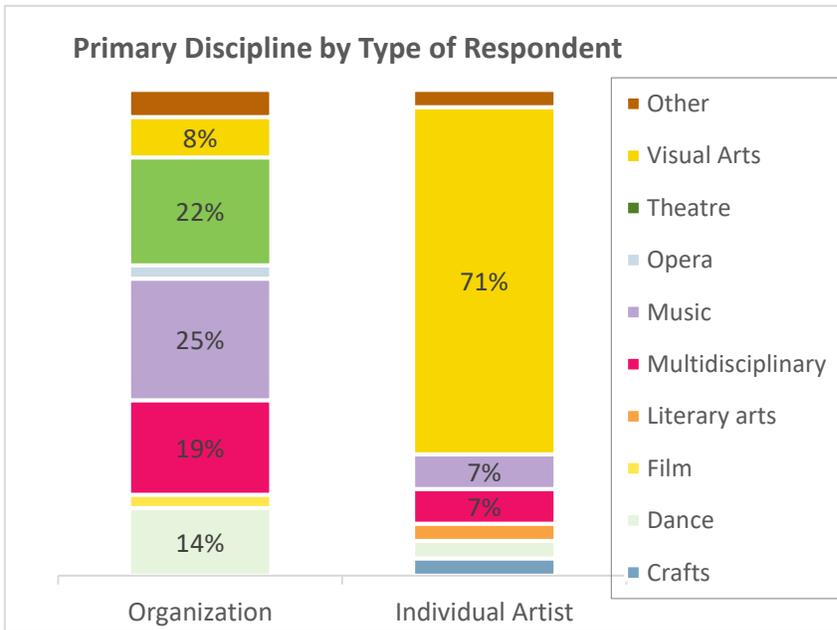


Figure 2: Primary Discipline Comparison - Organization vs. Individual Artist

disciplines as their primary – theatre (22%), music (25%), multi-disciplinary (19%) and dance (14%). Only 8% of organizations identified visual arts as their primary discipline.

Most respondents make and show their work outside of Millcreek (as expected; see Figure 4). In the breakdown of other places, over one-third focus efforts in downtown Salt Lake City, and another 29% report to work countywide (see Figure 3). Those that identify as working primarily in another municipality

include cities such as Draper, South Jordan, Magna, Murray City, Sandy, and West Valley City. Other locations include references to national and online distribution of work, and work outside of Salt Lake County specifically (e.g., Utah County).

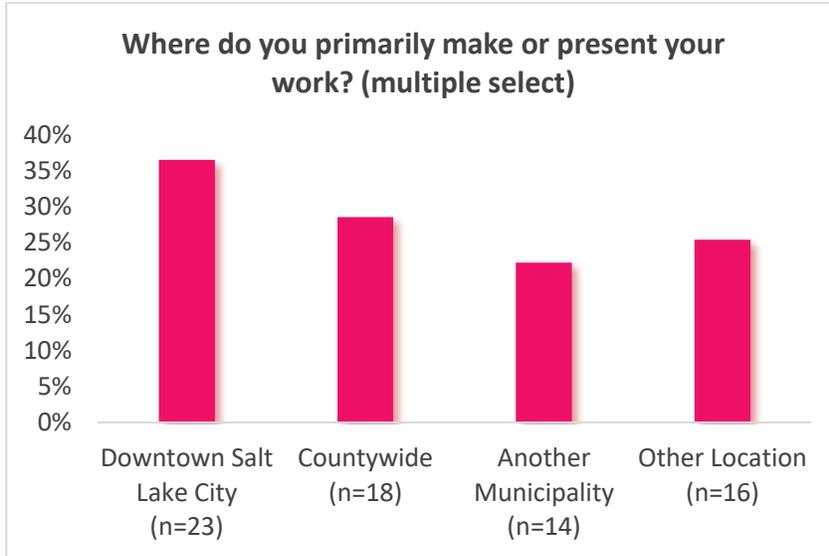


Figure 3: Primary Location of Making/Showing Work

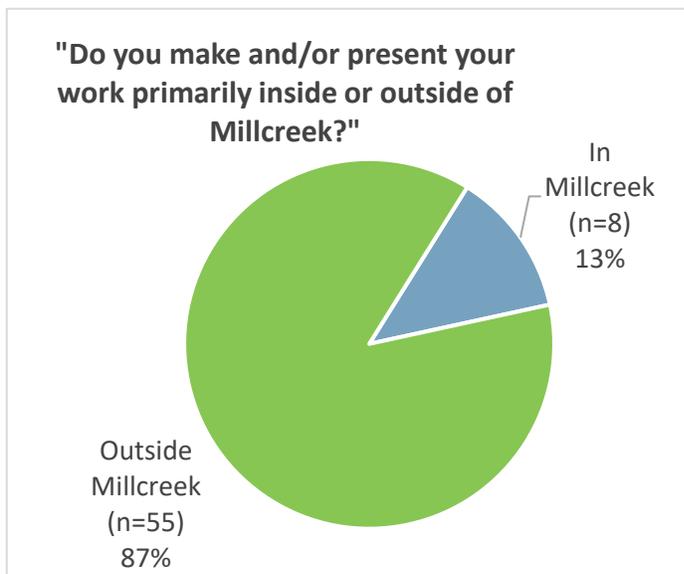


Figure 4: Primary Work in Millcreek

Current Facility Use

Respondents were asked detailed questions about current facility use related to creating/making, rehearsing, and performing/presenting/exhibiting/screening purposes. The purpose of this line of questioning was, in part, to further explore themes highlighted in the leadership interviews regarding use and need for rehearsal and maker spaces. Figure 5 shows the percentage for each space by use. The inner most ring represents the breakdown for creating/making uses; the second ring represents distribution for rehearsal use; and the outer most ring shows performance/presenting/exhibiting use.



In Figure 6 we can see that overall, for creating purposes, personal spaces (my own space or my house or a friends' house) are most commonly cited (25% and 31%), along with other spaces (25%; note that other spaces commonly are described as other city or public spaces or specific facilities respondents named). Rehearsal space responses were more space across the board, underscoring the general skew of the sample towards individual visual

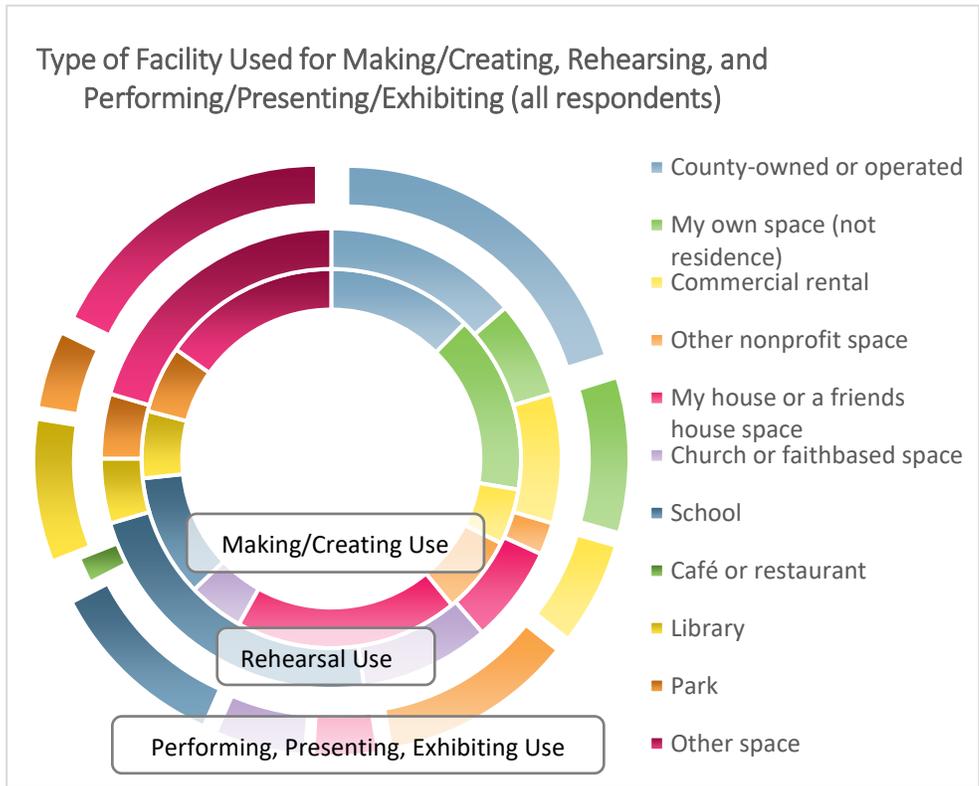


Figure 5: Types of Facilities for All Uses (all respondents)

artists with little use for rehearsal space, and likely the lack of rehearsal space (Figure 7). Schools and other spaces are most highly cited for rehearsal space. Regarding performance/presenting spaces, county-owned or run, other spaces (likely other jurisdictions' public or governmental space), other nonprofits, and schools are most heavily used spaces (41%, 25%, 23% and 22%, respectively).

Figures 6, 7 and 8 show the breakdown of spaces utilized for each type of activity by organization and individual artist. Organizations are most likely to rely on county-owned, other spaces, and schools for both creating and performing/showing works. Individual artists are more likely to rely on their own spaces or a friends' space for creating and performing/showing, as well as rely on county-owned and other spaces for performing/showing work (see Figure 6).

Overall, these graphs detail a picture that both organizations and individual artists heavily rely on their own spaces and on county-spaces, and organizations utilize schools across the board, in particular when accessing rehearsal space (see Figure 5), likely putting strain on schools to accommodate both rehearsal and performance needs (noted in facilities assessment reporting).

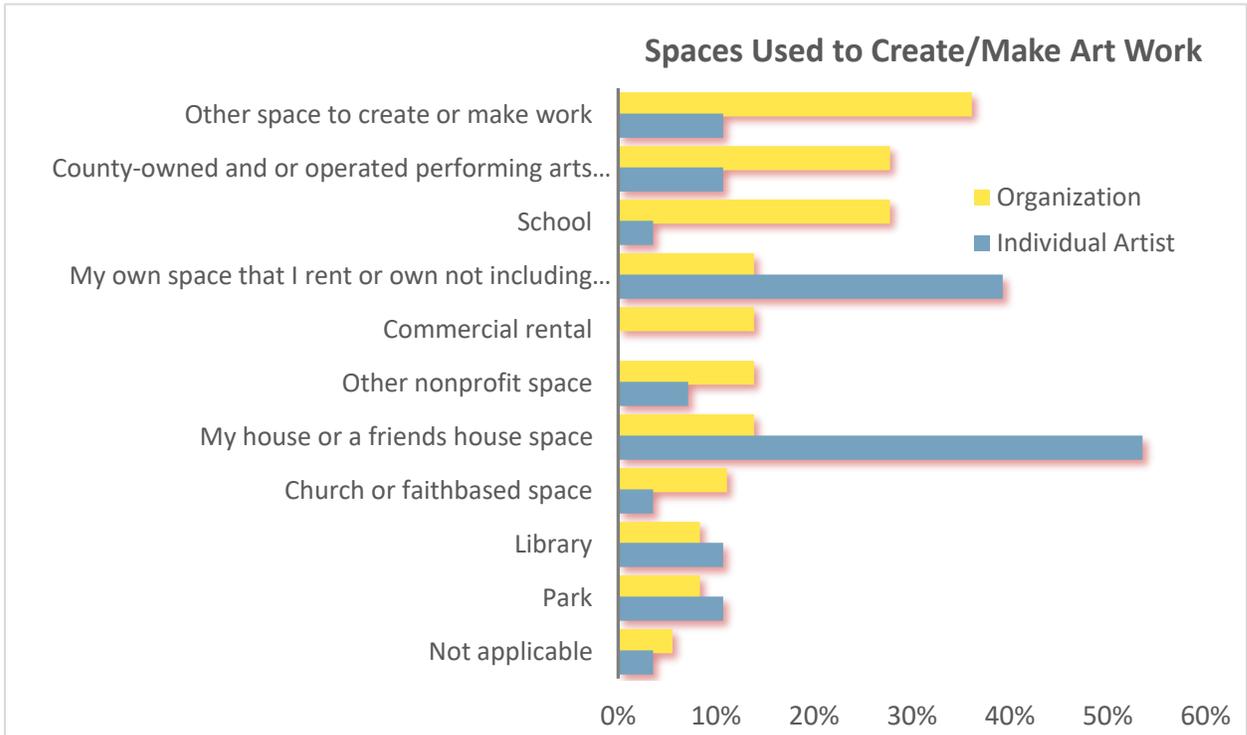


Figure 6: Creating/Making Spaces by Organization/Artist

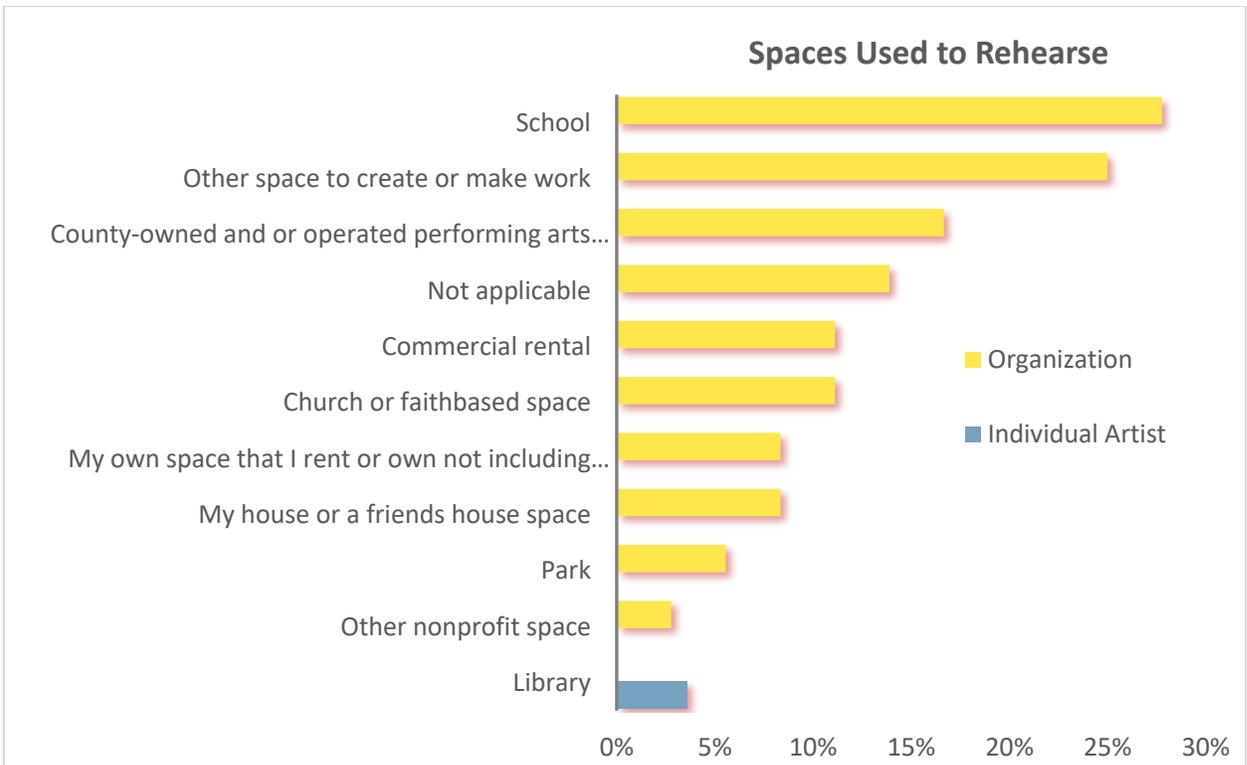


Figure 7: Rehearsal Spaces by Organization/Artist

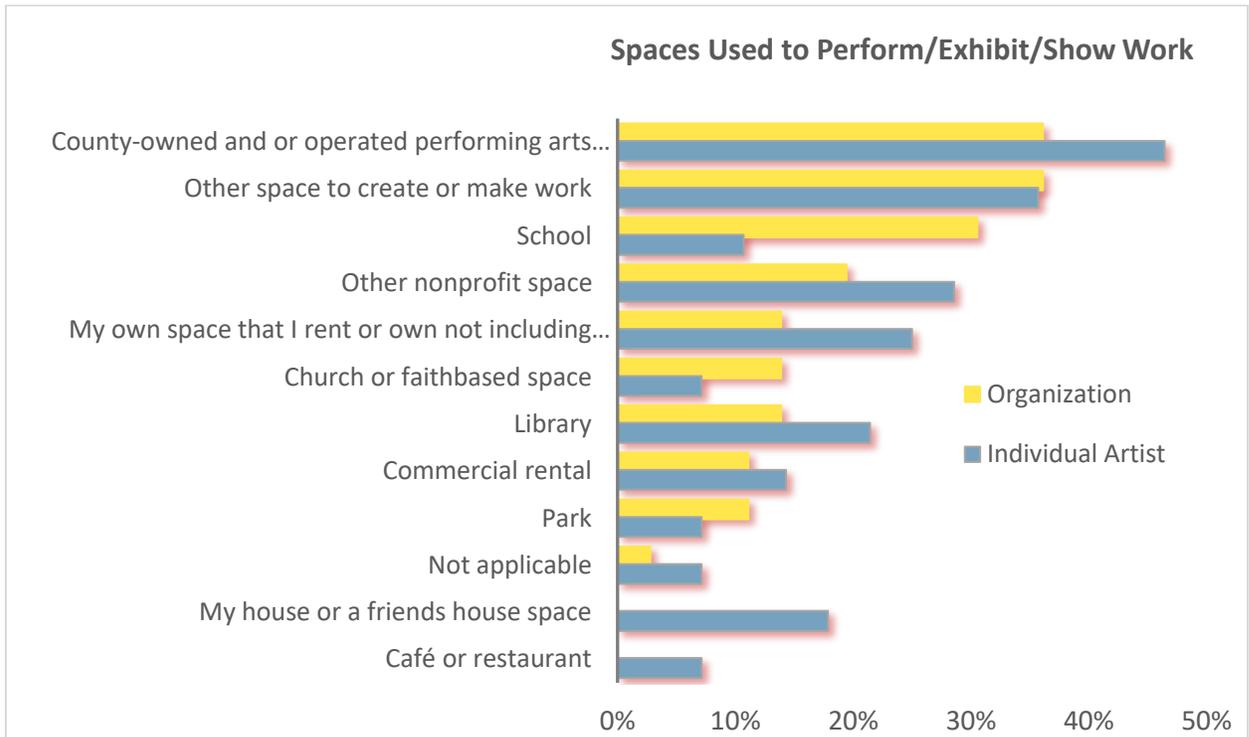


Figure 8: Performance/Showing Spaces by Organization/Artist

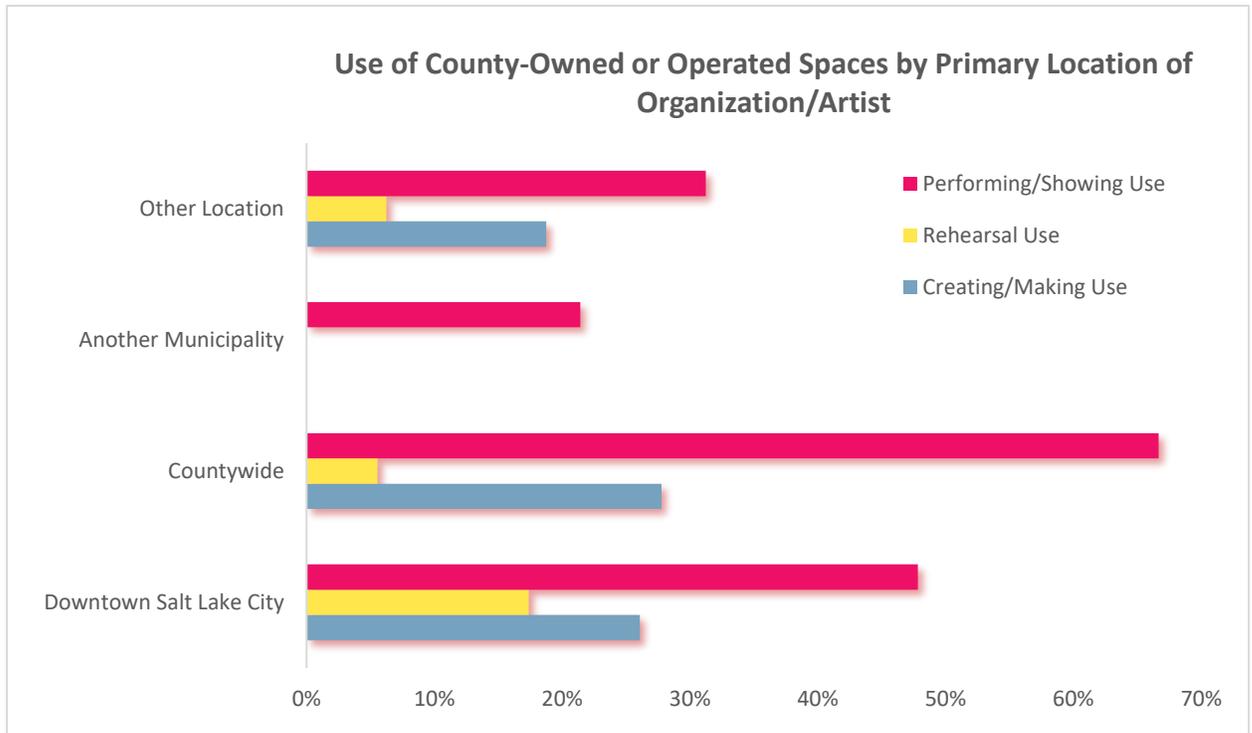


Figure 9: County-Owned Space Use by Location and Type of Use



Figure 9 digs deeper into self-reported use of county-owned facilities by primary location of organization/artists work and type of use. **Findings suggest that those working in downtown Salt Lake City as well as countywide rely on county-owned spaces for all uses, in particular for performing/showing (67%). In the case of organizations and artists who work in other municipalities, they only turn to county-owned spaces for performing and showing.** For other uses (creating and rehearsing), they turn to schools, libraries and other spaces (other government buildings local to their municipality; not shown).

Respondents were then asked to provide estimates on monthly costs for each of the spaces they use. Table 1 below shows the average costs for different facilities along with the high cost listed. There are differences in costs by discipline and type of organization. For example, dance organizations and artists report higher costs for creating and performing spaces, and arts councils spend the most for performing spaces.

Table 1: Sample of Self-Reported Costs for Space

		Avg. Monthly Cost for Creating/ Making Facilities		Avg. Monthly Cost for Rehearsal Facilities		Avg. Monthly Cost for Performing/ Exhibiting/ Presenting Facilities	
		Average	High	Average	High	Average	High
Type of Respondent	Organization	66	1,200	79	600	333	3,500
	Individual Artist	210	2,000	-	-	144	1,500
Primary Discipline*	Dance	720	2,000	300	600	320	1,300
	Multidisciplinary	13	100	-	-	117	500
	Music	63	300	54	300	73	500
	Theatre	-	-	59	265	1,054	3,500
	Visual Arts	150	1,200	-	-	149	1,500
	Other	-	-	-	-	23	70
Type of organization**	Arts council	10	100	15	150	358	3,500
	Arts education organization	13	100	72	600	266	2,152
	Fair, festival or special event	-	-	-	-	20	100
	Gallery	100	-	-	-	100	2,152
	History and or natural science museum	115	100	121	-	349	100
	Performing arts presenter producer	133	1,200	-	600	170	2,631
	Other type of organization	133	1,200	-	-	170	1,300

**not mutually exclusive categories so some are counted in both "other types" and in "arts council" or "performing arts organization."

*although film organizations did respond to the survey, there was no data available for these questions



Feedback on Current Facilities

All respondents were asked to reflect on what they like and don't like about current facilities. Individual artists, who are more likely to use their own spaces that they have most control over, also like:

- Flexibility that their own space allows (“It’s mine and I get to go there whenever I can/want.”)
- Ability to create art anywhere.
- Community spaces, like libraries, that are accessible and offer opportunity to connect directly to the public.
- Opportunity to participate in festivals that bring a lot of exposure.

Individual artists have frustrations with availability of space, such as:

- While home studios provide flexibility and control, there are distractions which can make it difficult to focus.
- Not all homes are built to be artist studios. Some lack the open layout and lighting that is conducive to creating visual art (in particular painting).
- Although accessing space to create art might be easier



Figure 10: Satisfaction with Facilities

“I can paint anywhere. I usually paint at a study table in the Magna Library, sometimes I paint at a table in a grungy church storage basement connected to the place I’m renting, Sometimes in a park. It’s just anywhere I can go where it’s free and quiet and no one will hassle me.”

– Individual Artist Respondent

“I like presenting in libraries because the access to the artwork here is very open, and viewers are likely to be from a more diverse background than gallery shows. Libraries also seem to offer great opportunities for community engagement and presentations.”

– Individual Artist Respondent

“I need more space for my work, but studio rentals are very expensive.”

– Individual Artist Respondent

for individual artists, there is in general, a significant lack of exhibition spaces that are readily available, and the few that are, tend to offer space in a non-visible part of the facility (such as a library).

Organizations also found positives and negatives when they reflected on current facility use. The positives included:

- There is little to no cost for some city-owned facilities, such as Draper City amphitheater.
- Facilities seem to have good accessibility and flexibility, and dance organizations can find specific needs like sprung floors.
- For those that have access to local venues, the proximity to community and other amenities is highly valuable and appreciated.

Of course, there are frustrations for organizations as well, including:

- There isn’t enough variety of spaces to accommodate a variety of artistic disciplines (i.e., multi-use spaces and different sized theatres, galleries, etc.), nor is accessibility and flexibility



enough to meet demand overall. Multi-use space, in particular, is seen as a potential solution to the demand for both creating and rehearsal type spaces.

Millennium Dance Complex is a great dance studio in downtown Salt Lake City, and the owner allows us to use it at very discounted rate because we are a nonprofit dance company.”
– Organizational Rep Respondent

- Unless organizations have their own space, access to spaces that can accommodate a range of logistical needs (such as set building, loading, costumes, etc.) is limited.

Varied Sources of Income

Respondents were asked a series of questions about income distribution to gain a better understanding of the funding landscape in Salt Lake County. Figure 11 shows responses for organizations’ financial breakdowns by four general areas: earned income, individual contributions, government funding and other income (including sponsorship, special events, etc.).

“It is hard to get good dates for our performances. A lot of the performing arts spaces are booked out, so we are unable to get a solid weekend. Most of the availability is on holidays.”
– Organizational Rep Respondent

The key take-away for organizations is the strong reliance on government funding. Over one-third of organizations report that 50% or more of their income comes from government agencies. Earned income is second in terms of sources of income with 29% stating they gain 50% or more of their income from earned sources. Individual contributions and other sources make up the least with only 15% of respondents gaining 50% or more of their income from individuals. Individual giving is an area that organizations likely need further assistance and/or motivation to develop further. It is likely that many organizations assume that government funding will be a reliable source of support for the future even though that might not always be true. **It may be worthwhile to build capacity and knowledge of organizations on the status and limitations of government funding, and of how to further diversify sources.**

Individual artists earn income from a variety of sources, and often hold down several jobs to be able to support themselves. (Figure 12). **A little under three in ten (29%) earn over half of their income through artistic practice, with six in ten (61%) earning under 25% of their income through the arts.**

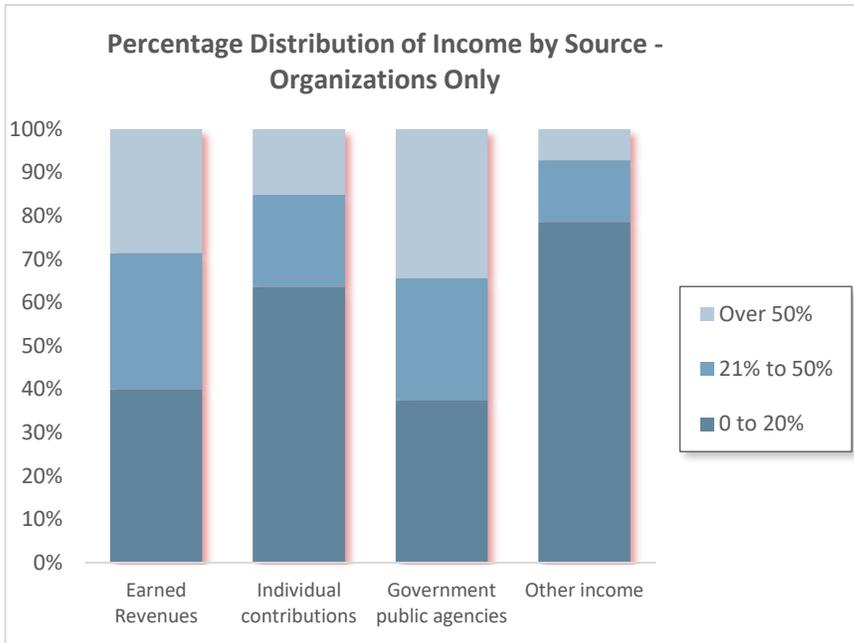


Figure 11: Distribution of Income by Source - Organizations Only

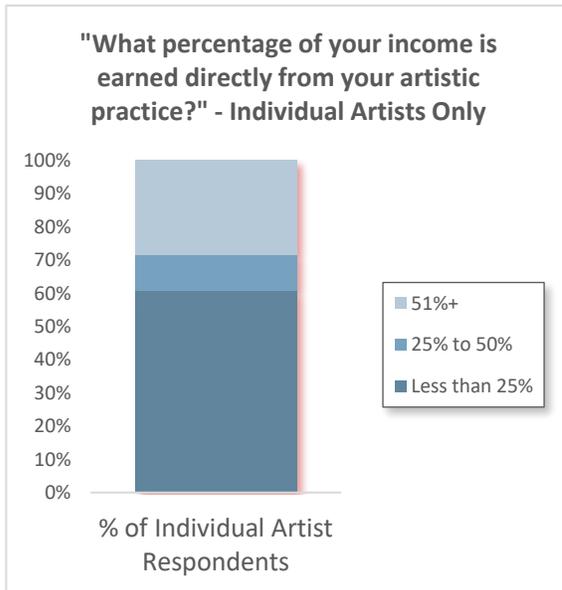


Figure 12: Percentage of Income from Arts - Individual Artists

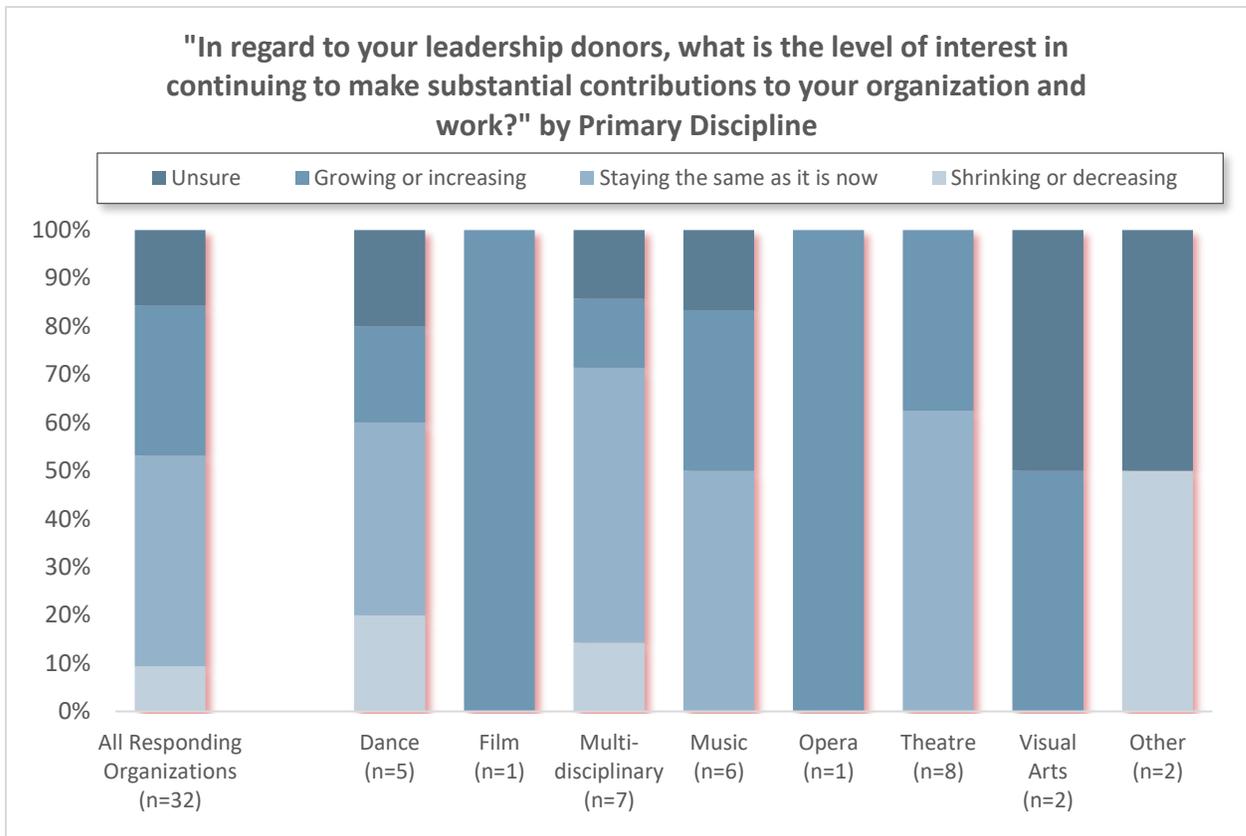


Figure 13: Trends of Leadership Gifts by Primary Discipline

Organizational respondents were asked to provide their insight on the potential for future leadership gift support. (see Figure 13). Overall, organizations feel their leadership gifts will either stay at the level they are now (44%) or increase (31%), indicating moderate stability in this support. There isn't much variation in response across disciplines; however, dance organizations are slightly more bullish about future gifts than multidisciplinary organizations.

Desire for Different Supports

When it comes to accessing facilities, the leadership interviews indicated the possibility for a range of supports that would help stabilize artists and organizations in their work.

Respondents were asked to rank different types of supports as to how desirable they are. Figure 14 shows the response across all respondents. Greater collaboration between governments and municipalities and their artists and organizations is ranked as a top support, underscoring some of the findings from leadership interviews. This is a particularly compelling potential strategy that might help to knit together efforts across the county, and align efforts across sectors such as transportation, economic development, and planning.

Capacity building and technical assistance to support the creation of maker spaces was ranked second of all items, again reinforcing the overall interest and prioritization of maker spaces overall. Opportunities to connect to others in business, nonprofit and educational sectors is third most desirable support, followed by desire for regional events that bring people together.

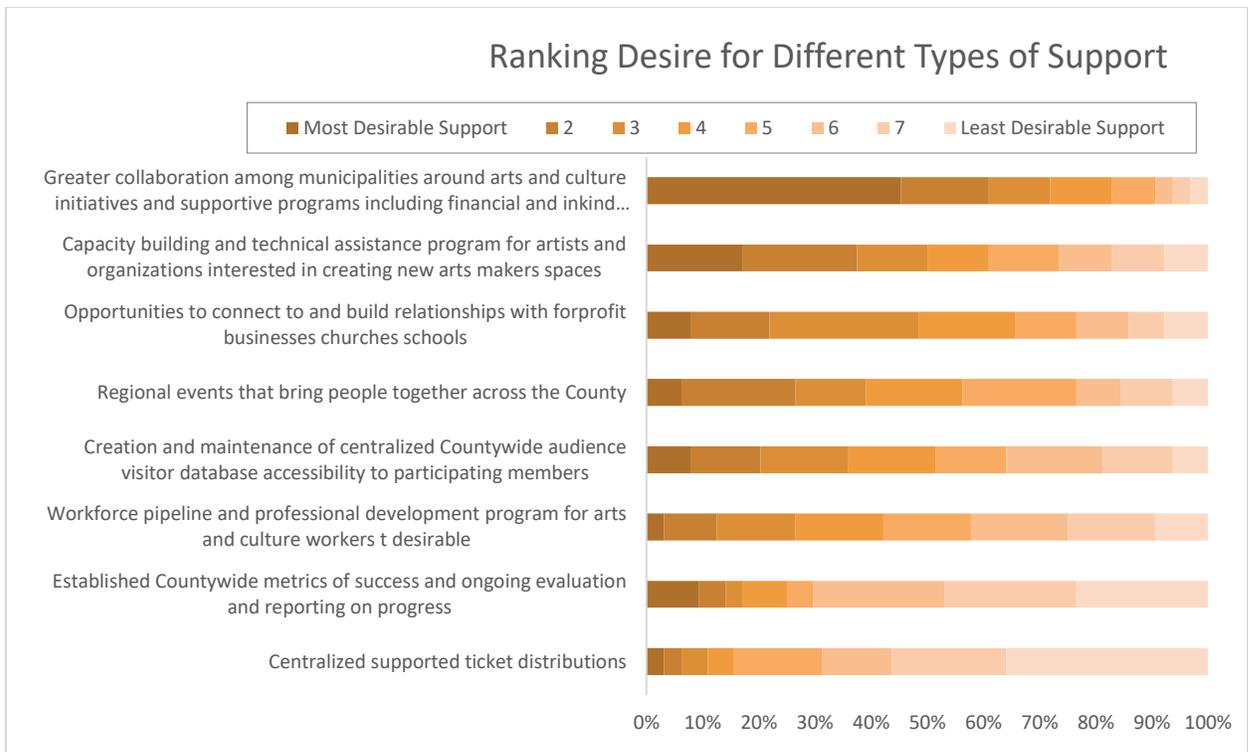


Figure 14: Ranking of Supports - All Respondents

Further examination of results comparing organizations and individual artist shows distinct differences (Figure 15):

- Individual artists are more interested in 1) capacity building/TA, 2) regional events, and 3) workforce pipeline/professional development.
- Organizations are more interested in 1) greater collaboration among municipalities, 2) creation and maintenance of an audience/visitor database; and 3) opportunities to

[We need] More training in arts advocacy including pairing artists with other professionals or community organizations for hired opportunities, a curatorial program, workshops on art law, insurance for artists, documenting artwork, grant-writing workshops, and marketable job skills)..”
 – Individual Artist Respondent

connect and build relationships with businesses.

Individual artists want more support to build up their capacity to be successful in business, and they like regional events given their exposure and success with festivals and fairs.

Organizations with government support would like to have jurisdictions collaborate more effectively together. This would greatly

enhance their ability to gain access to supports. If there was greater coordination among jurisdictions, organizations the assumption that opportunities for public funding support would increase. Organizations may be prioritizing networking with local businesses more so than individual artists because they are better able to leverage such connections (e.g., can receive individual donations as 501c3 nonprofits, can forge strategic business relationships, etc.).

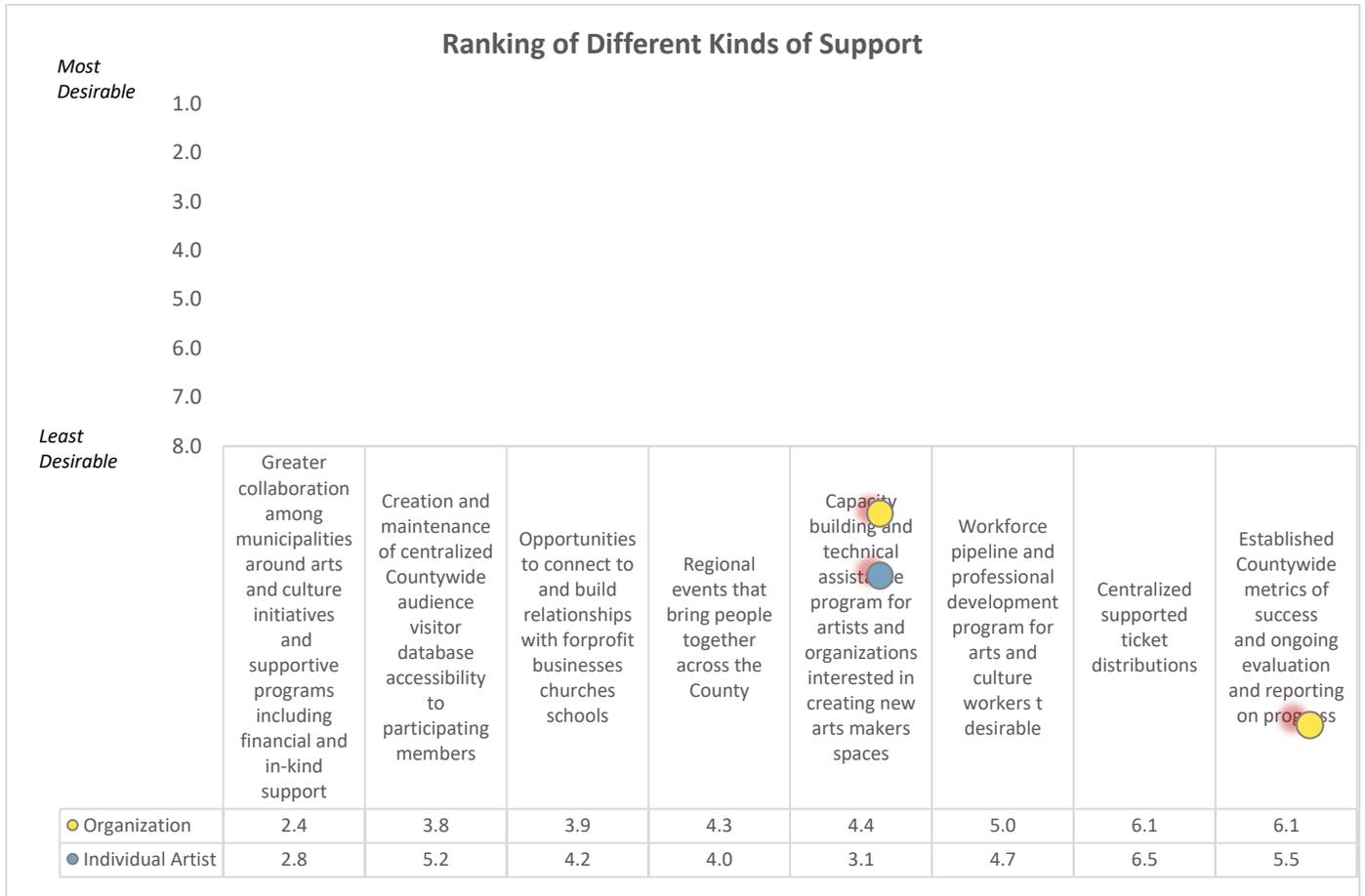


Figure 15: Ranking of Supports Comparing Organizations and Individual Artists

The Future is Bright

Respondents were positive about the potential growth and expansion of the arts and cultural sector in Salt Lake County. Figures 16, 17, 18 and 19 describe respondents’ sense of the future trends of arts and culture in Salt Lake County regarding audiences/visitors, facility needs, and the sector in general. Overall, most respondents feel that all components of the sector are growing (Figure 16). Analysis comparing results across different types of organizations shows that organizations are overall more confident of growth across audiences, facility needs and general sector growth. In addition, arts councils also appear most likely to have a positive growth outlook on the future in comparison to other organizations, but the differences are slight. Regarding facility needs, all see greater need in the future, which is to be expected not just because of the current stated need, but also as a reflection of anticipated growth for the sector as a whole.

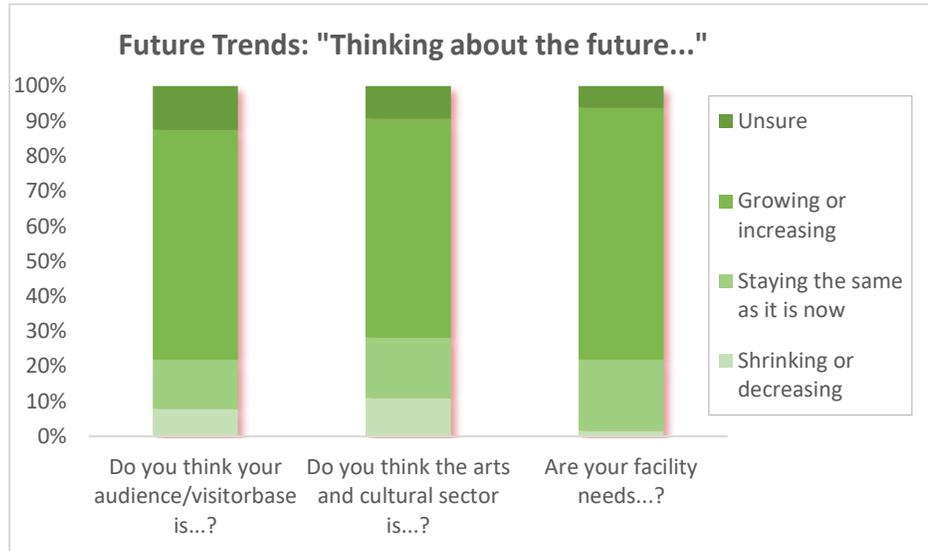


Figure 16: Aggregate Results for Future Trends in Salt Lake County

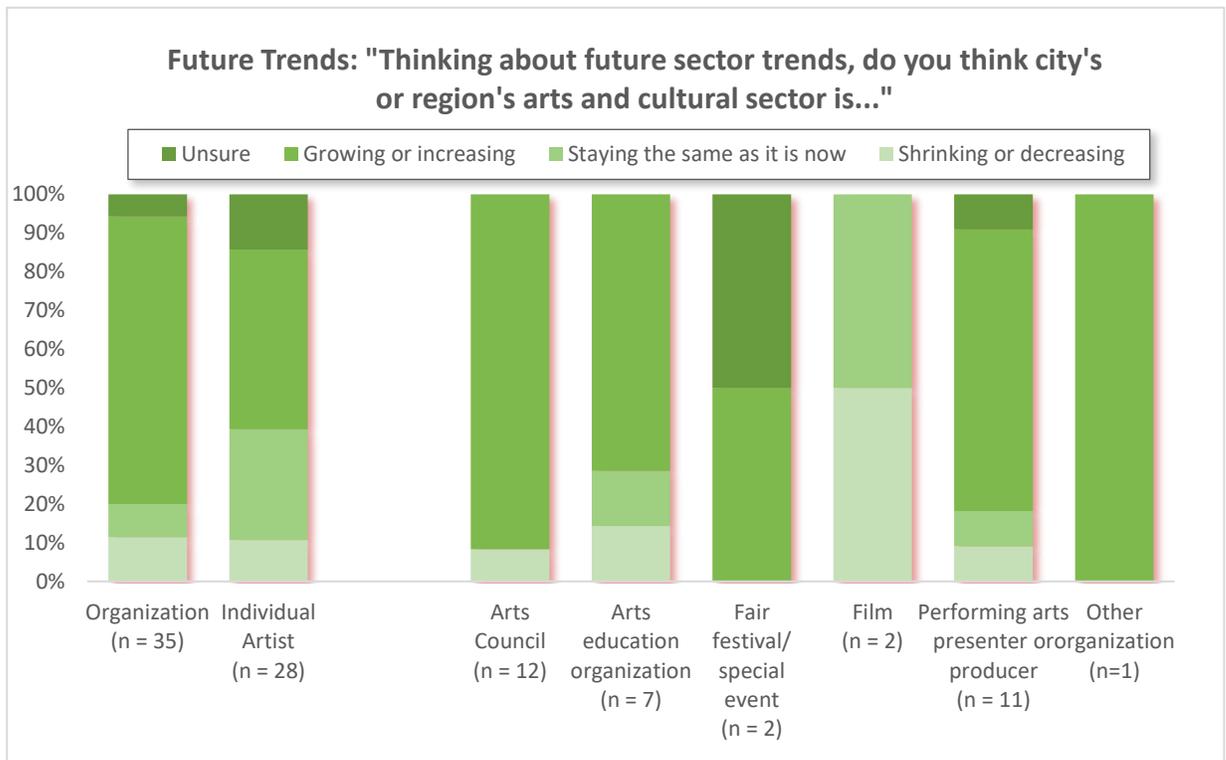


Figure 17: Future Trends of General Sector Growth

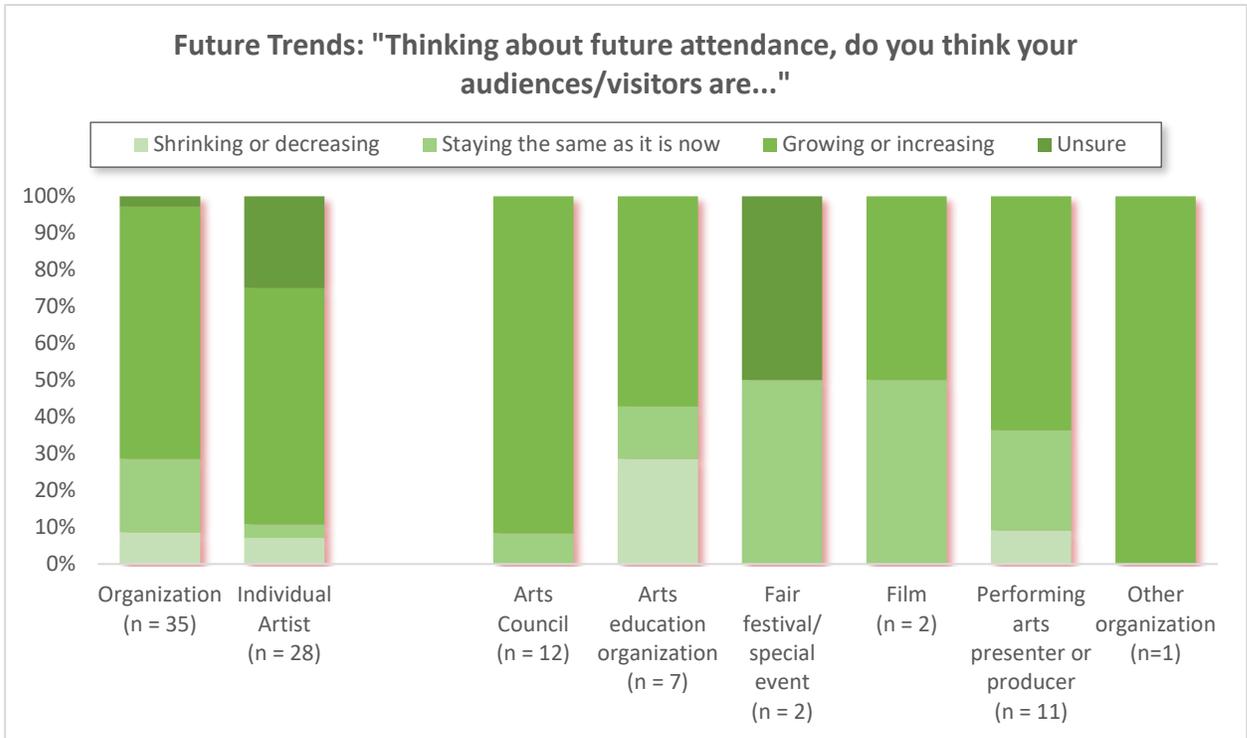


Figure 18: Future Trends of Audiences Comparison

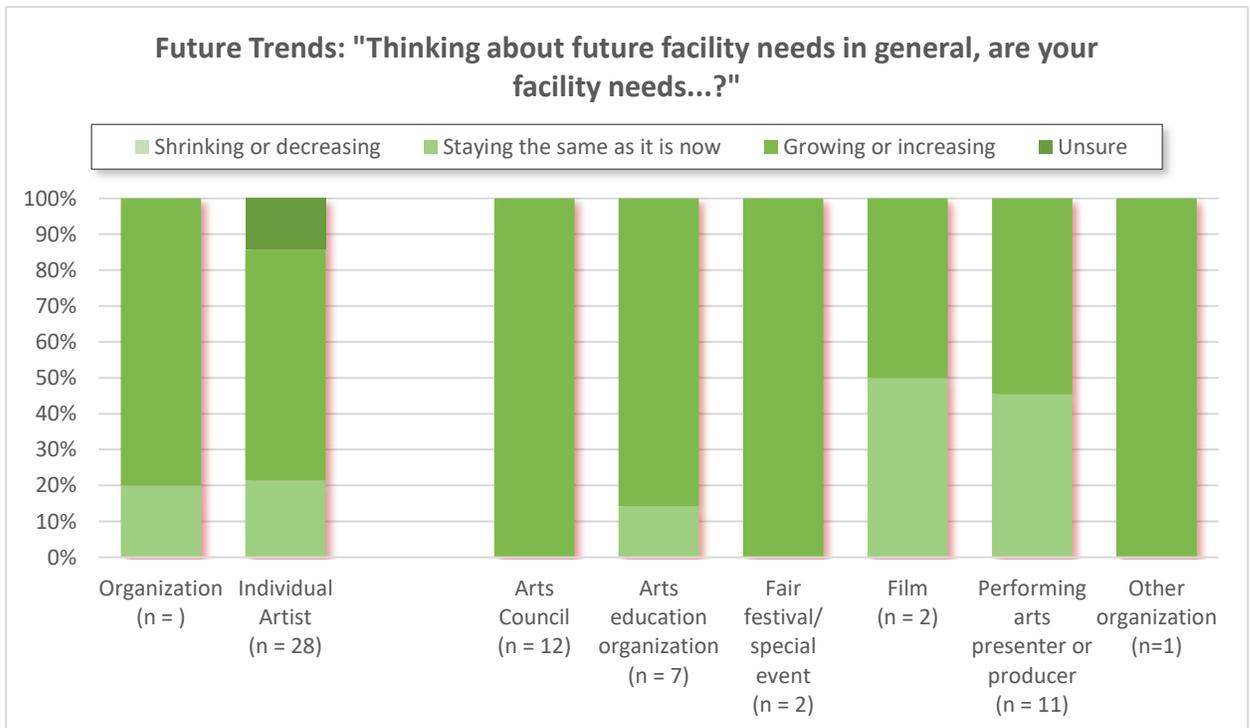


Figure 19: Future Trends in Facility Needs Comparison



Cost is Paramount in Assessing Facilities

When asked to rank the importance of different facility characteristics in selecting a facility, cost is ranked highest (Figure 20), followed by adequate size for audiences and visitors, flexibility of scheduling, and a location close to audience/community. Last on the list of importance is a location that is close to public transit.

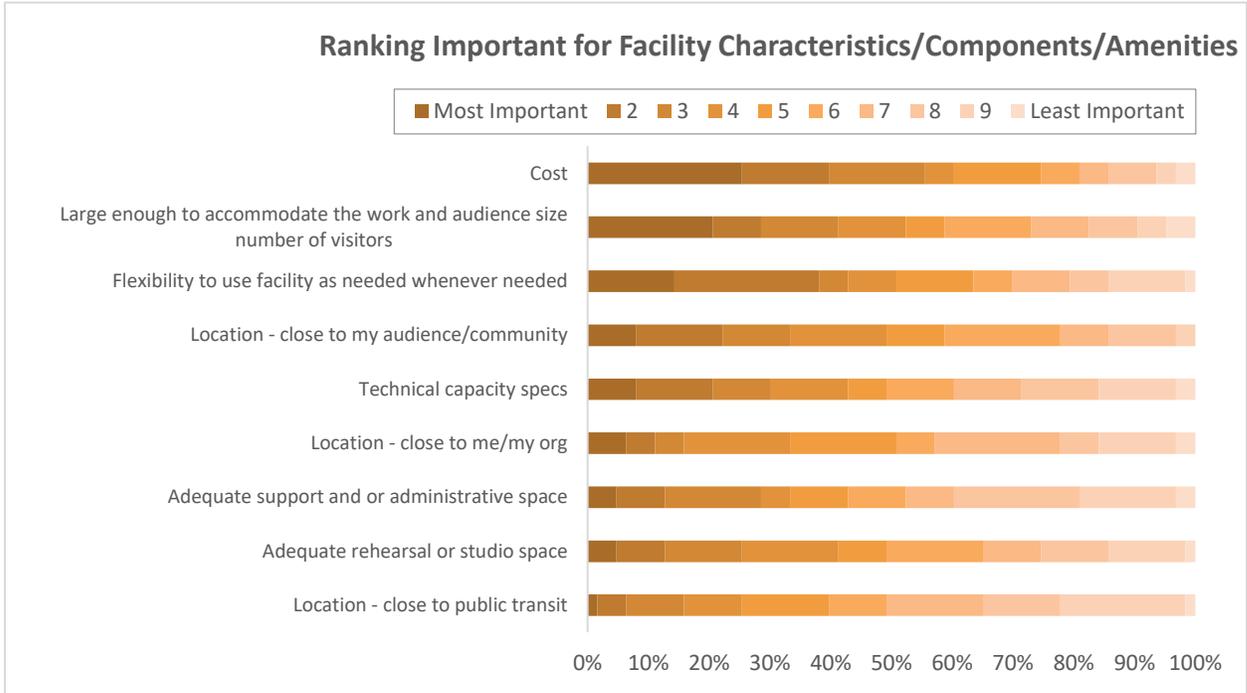


Figure 20: Ranking of Facility Characteristics

Figure 21 below shows how organizations and individual artists rank the importance of facility characteristics. Organizations rank cost and location accessibility to audiences higher compared to artists. In addition, organizations rank location close to the organization itself (likely administrative offices or home office) higher than individual artists. Flexibility for use when needed and adequate size of facility are equally as important to both organizations and artists, but adequate administrative support space is more important for individual artists because they are not likely to have any administrative or other support space available to them outside their home office.

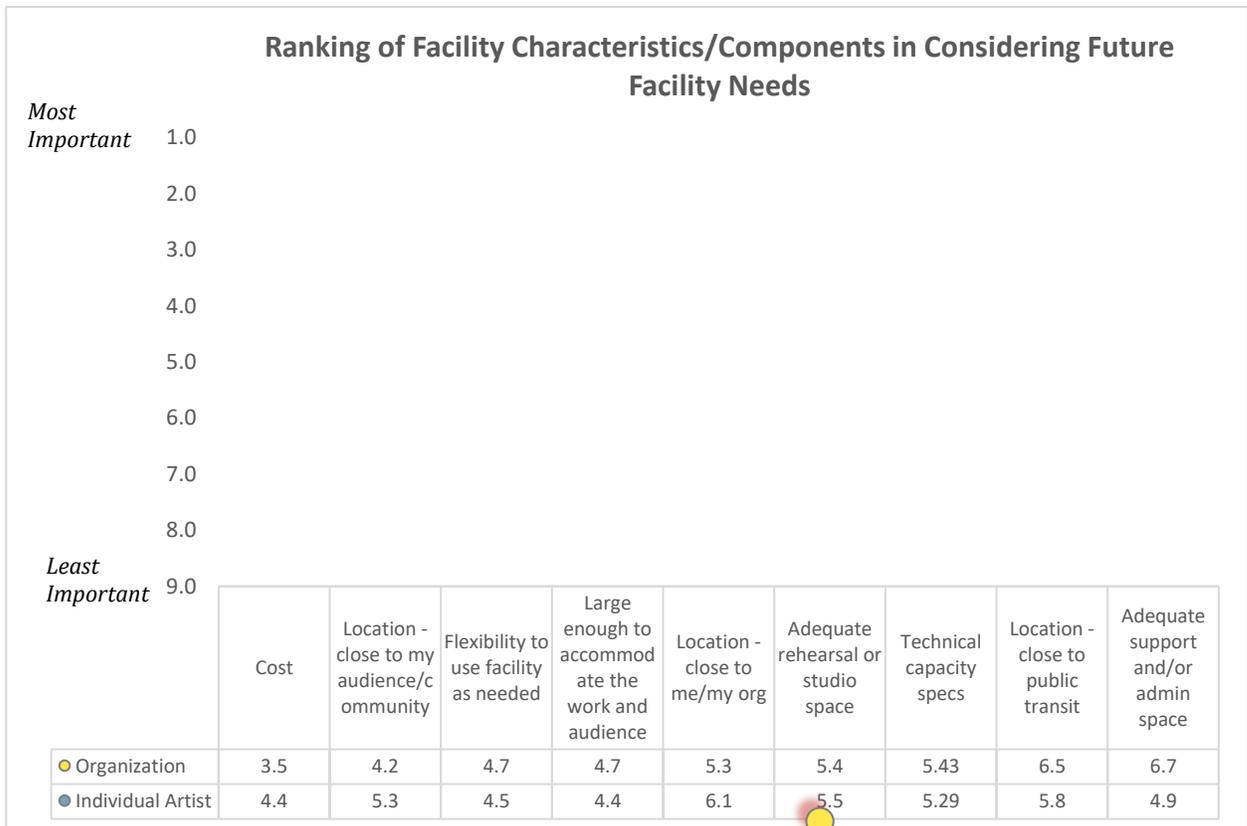


Figure 21: Ranking of Facility Characteristics Comparison

Support for Facilities and for New Policies

Create Today LLC has been exploring the County’s working vision and strategy throughout this planning process, and the market research component allowed for some testing of a few potential strategies that have surfaced throughout. Figures 22 and 23 show results of ranking strategies about priority level. Overall, in aggregate respondents ranked supporting performing arts spaces as highest (Figure 22). However, when reviewing results, it is clear that the focus on performing arts facilities is skewed by the strong representation of performing arts organizations in the sample; and that for individual artists, who represent visual arts more heavily, are more likely to prioritize visual arts and crafts spaces (Figure 23).

The second most highly prioritized strategy was to work on policy at local and state level for greater funding support. This is intuitive in a way because arts organizations in Salt Lake County are accustomed to and familiar with the ZAP tax which provides a percentage of sales tax in grants to Salt Lake County arts organizations.

“I think a service similar to Airbnb that would allow facilities and artists seeking to use them to connect, find out what is available in the area, pricing, etc. and arrange for use of public spaces.

Also [needed is] studio space for local artists that is communal or subsidized so that artists who want to work locally are not hindered by the high property prices of this area.”
 – Individual Artist Respondent

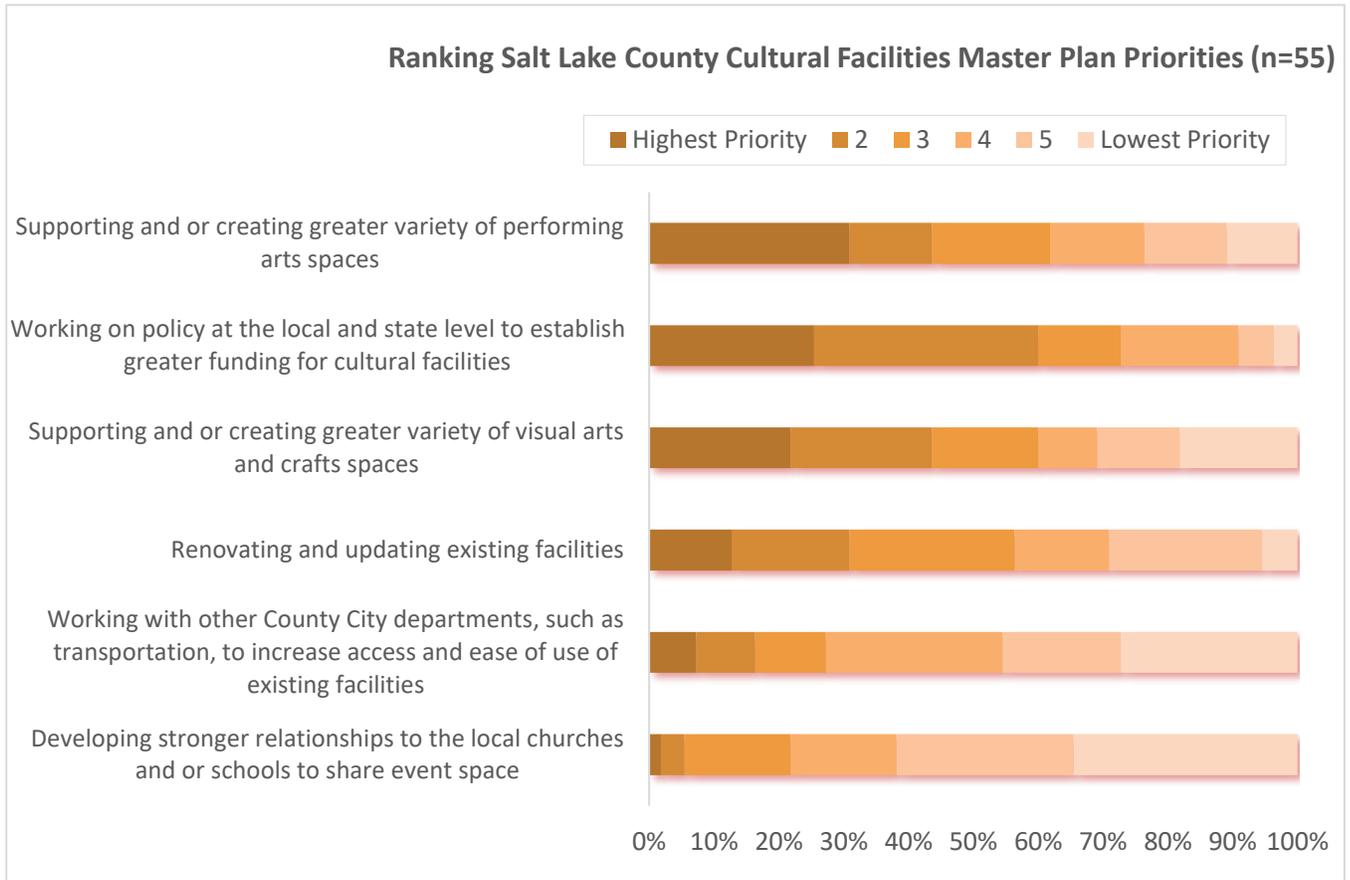


Figure 22: Ranking of Priorities

Besides the differences prioritizing performing arts facilities versus visual arts and crafts facilities, differences between organizations and artists are slight:

- Organizations are more likely to prioritize renovating existing facilities.
- Individual artists are more likely to prioritize working at the policy level to establish more funding.

The facilities with technical versatility are over-used and unavailable to reserve. Or, like Eccles, way over-priced for local arts organizations to afford.”
 – Organizational Rep Respondent

[They should] Better maintain what they have, look for ways to share what others have, find opportunities to cultivate and grow talent within the community.”
 – Organizational Rep Respondent

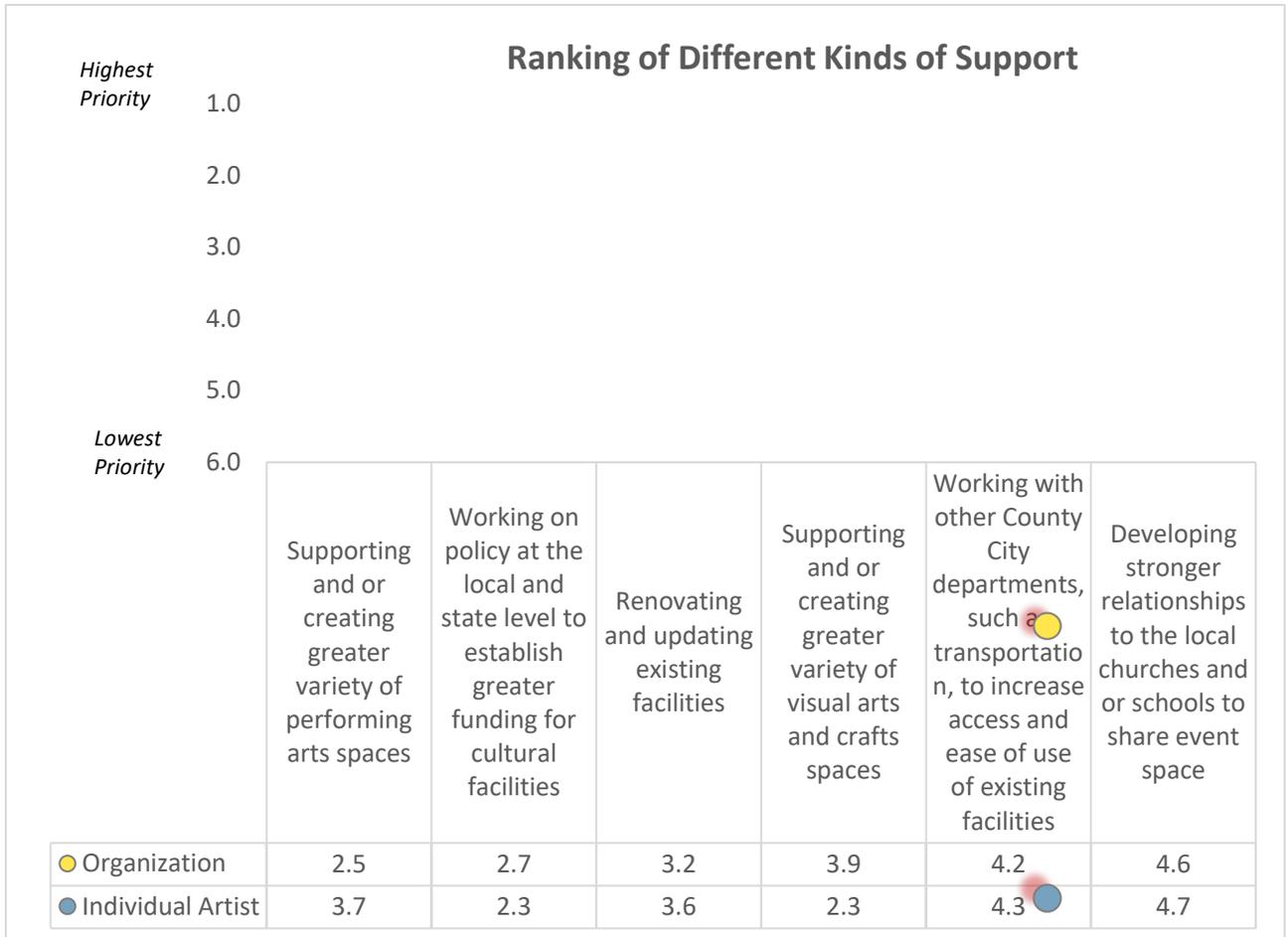


Figure 23: Ranking of Priorities Comparing Organizations and Artists

Opportunity for Millcreek

When asked if they would be interested in working in Millcreek to make, rehearse, show their work, about three-quarters of respondents (76%) said yes, a significant indicator of the potential for Millcreek to establish itself as another hub within the larger arts and culture system of Salt Lake County (Figure 24). All the individual artist respondents said that they would be interested in working and showing in Millcreek (figure 25).

*“It is **what is lacking??** lacking in the contemporary visual arts and significant public sculpture.”*
 – Individual Artist

Millcreek has a tremendous opportunity to step in and fill this gap and consider creating multi-purpose maker-friendly spaces that specifically cater to visual arts and crafts artists.

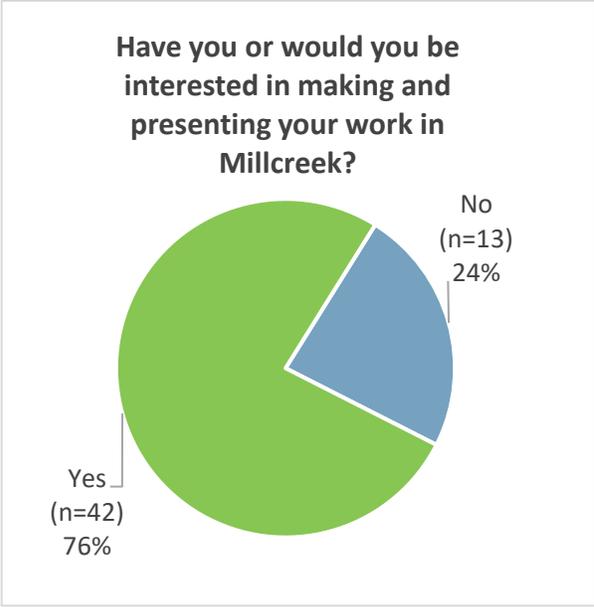


Figure 24: Interest in Working in Millcreek

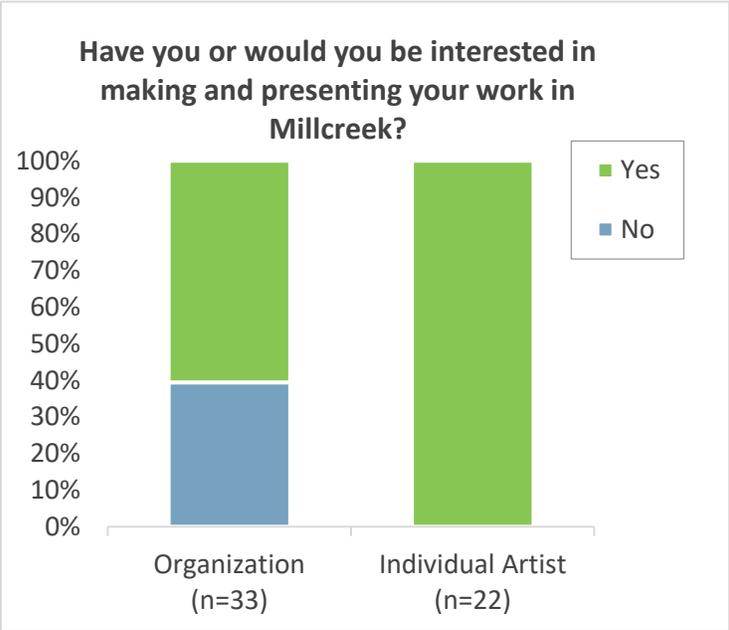


Figure 25: Interest in Working in Millcreek - Organizations vs. Artists