Phase IV: Market Research

Ticket Buyer/Online Panel Survey

As a companion to the organizational needs survey, Create Today LLC conducted market research with residents and current audience members to gain a better sense of current market activity in the arts, general perceptions of arts and cultural offering, and a resident perspective on potential County strategies.

The research focused on two sample sources: 1) an online panel of approximately 600 adults living in Salt Lake County 18 years of age and older[1]; and 2) a request to the ArtTix buyer list as well as the ticket buyer list from Millcreek City. In this way, we were able to compare current ticket buyers and a sample of general adult population in the county.

The survey was launched in January 2020 and achieved a total of 1,822 responses across all collection efforts. Detailed response numbers are described in Table 1 below:

Sample	Number of Total Responses	Number of Salt Lake County Responses
ArtTix List	1,106	843
Millcreek List	112	104
Online Panel	604	554
TOTALS	1,822	1,501

Table 1: Response Results by Sample

This report is a snapshot of results, comparing findings across sample sources, as well as by age, race/ethnicity, and gender for select topics.

Demographics

Overall demographics are relatively consistent across all three samples (see Table 2 below). They describe a majority white, high income and high educational attainment population. The key difference between the ticket buyer samples and the online sample is in regard to age: the online panel skews much younger in comparison with 42% between 18 and 34 years old compared to 9% of the ArtTix list and 14% of the Millcreek list. This is not surprising given that often online surveys skew younger, due to younger populations' greater comfort with technology.

The difference of response across samples, in general, can be ascribed to differences in age. It is an important reminder that going beyond the perspectives of existing ticket buyers is important to understanding multiple perspectives of the entire population.

[1] Provided by SurveyGizmo, a reputable national panel provider. This sample is referred to as a convenience sample, as respondents sign up to take surveys on a regular basis with the company.

	ArtTix List	Millcreek	Online Panel Sample
Sample Size	843	104	554
Gender			
Female	66%	68%	68%
Male	29%	26%	30%
Transgender/Another	1%	0%	0%
Prefer not to answer	4%	6%	1%
Age			
18 to 34	9%	14%	42%
35 to 44	21%	22%	25%
45 to 54	21%	16%	15%
55 to 64	24%	18%	12%
65 to 74	20%	17%	4%
75+	6%	12%	1%
Race/Ethnicity			
American Indian or Alaskan Native	1%	4%	2%
Asian	3%	4%	3%
Black or African American	1%	2%	2%
Latino Latina Hispanic	4%	3%	9%
Native Hawaiian or other Island Pacific	1%	1%	1%
White	87%	83%	85%
Mixed race	3%	4%	3%
Prefer not to answer/none declared	7%	14%	1%
Education			
Less than high school	0%	1%	3%
High school graduate or GED	2%	1%	22%
Some college	13%	13%	28%
Associates degree	6%	10%	11%
Bachelor's degree	36%	37%	26%
Graduate or PhD	43%	39%	9%
Household Income			
Less than $25,000	1%	6%	18%
$25,000 to $34,999	2%	2%	11%
$35,000 to $49,999	7%	6%	14%
$50,000 to $74,999	16%	20%	23%
$75,000 to $99,999	12%	12%	14%
$100,000 to $124,999	18%	21%	8%
$125,000 or higher	28%	17%	8%
Prefer not to answer	15%	16%	5%

Table 2: Demographics by Sample

Current Participation

Respondents were asked how many times a year they typically attend or participate in a range of different types of arts and culture events from theatre to modern dance to film and art festivals. Figures 1, 2 and 3 represent responses for each individual sample.

In general, ArtTix buyers are more active participants than either Millcreek buyers or the online panel respondents. In terms of ranking well-attended events, all samples are most active in attending live music (39%, 36%, and 19% for ArtTix, Millcreek and online panel respectively attend four or more times a year).

Where the samples differentiate is in the order of activities after live music. Both Millcreek and online panel respondents are more active in attending art museums and galleries (28% and 10%, respectively, attending 4 or more times), compared to ArtTix respondents, who spend more time attending the performing arts. Of course, this makes sense given that ArtTix is a performing arts ticketing database. In fact, for the online panel respondents, the second and third activities are museum-related (art museums and children's museums). While there is a tremendous amount of evidence to support and focus on performing arts facilities in any master plan, visual arts and other museum-based facilities can play an important role in providing opportunities for engagement for Salt Lake County residents.

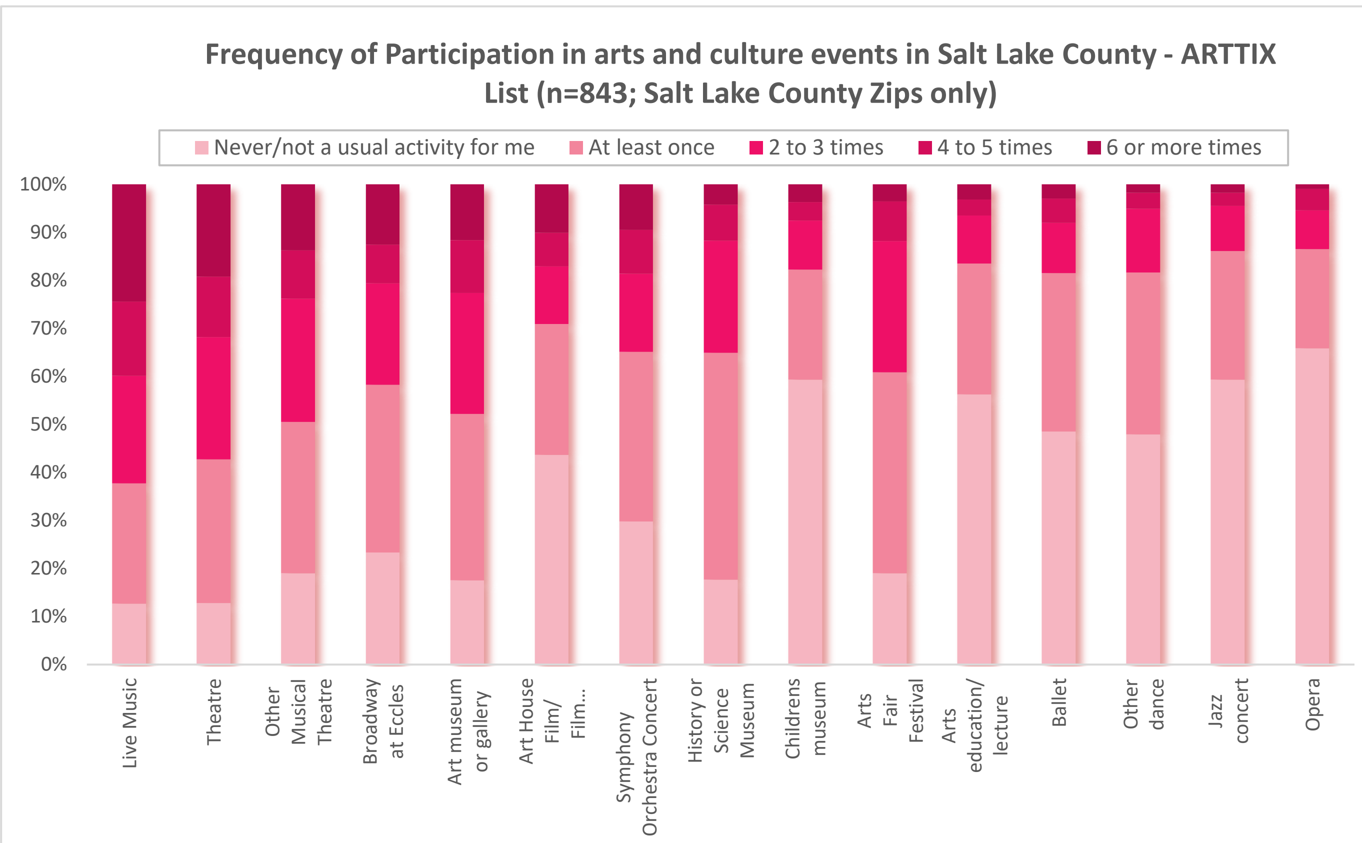

Figure 1: Participation in Arts Activities for ArtTix Buyers

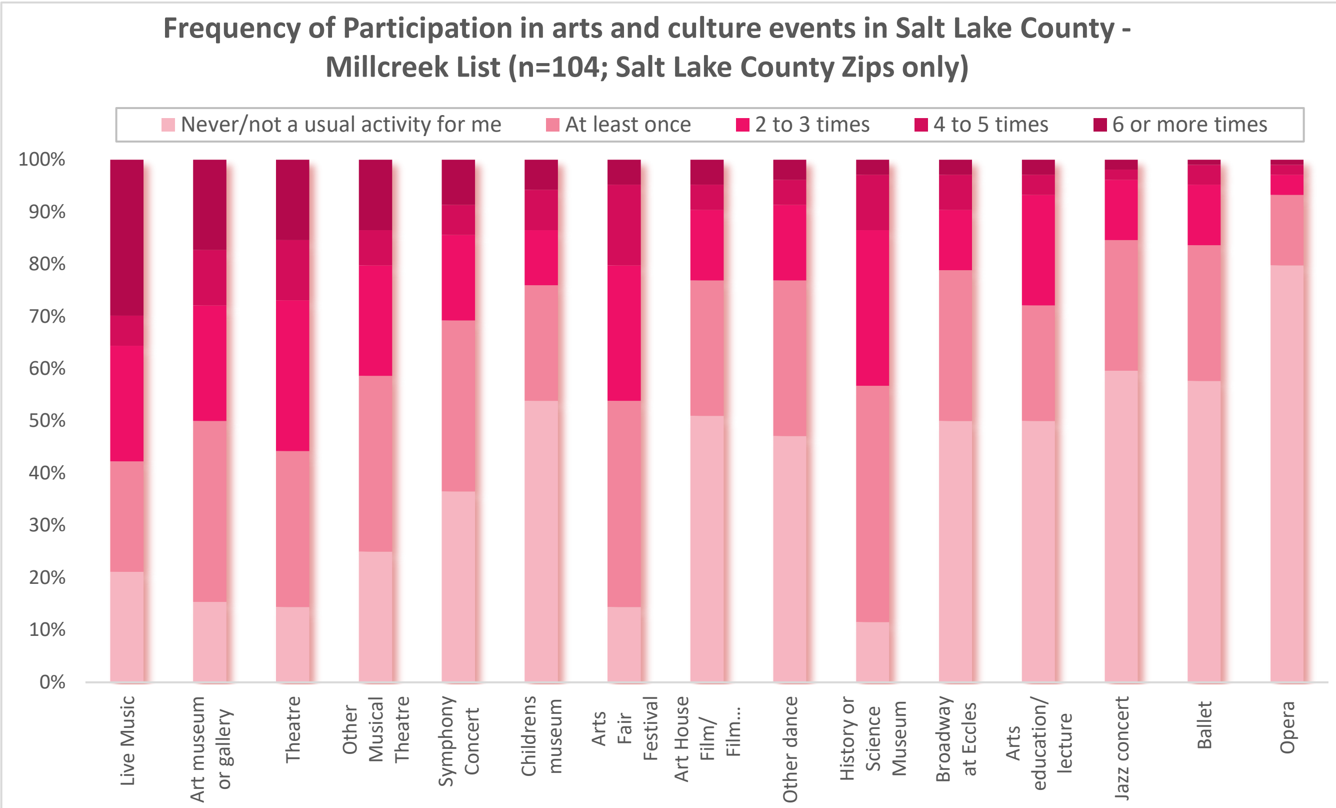

Figure 2: Participation in Arts Activities for Millcreek Buyers

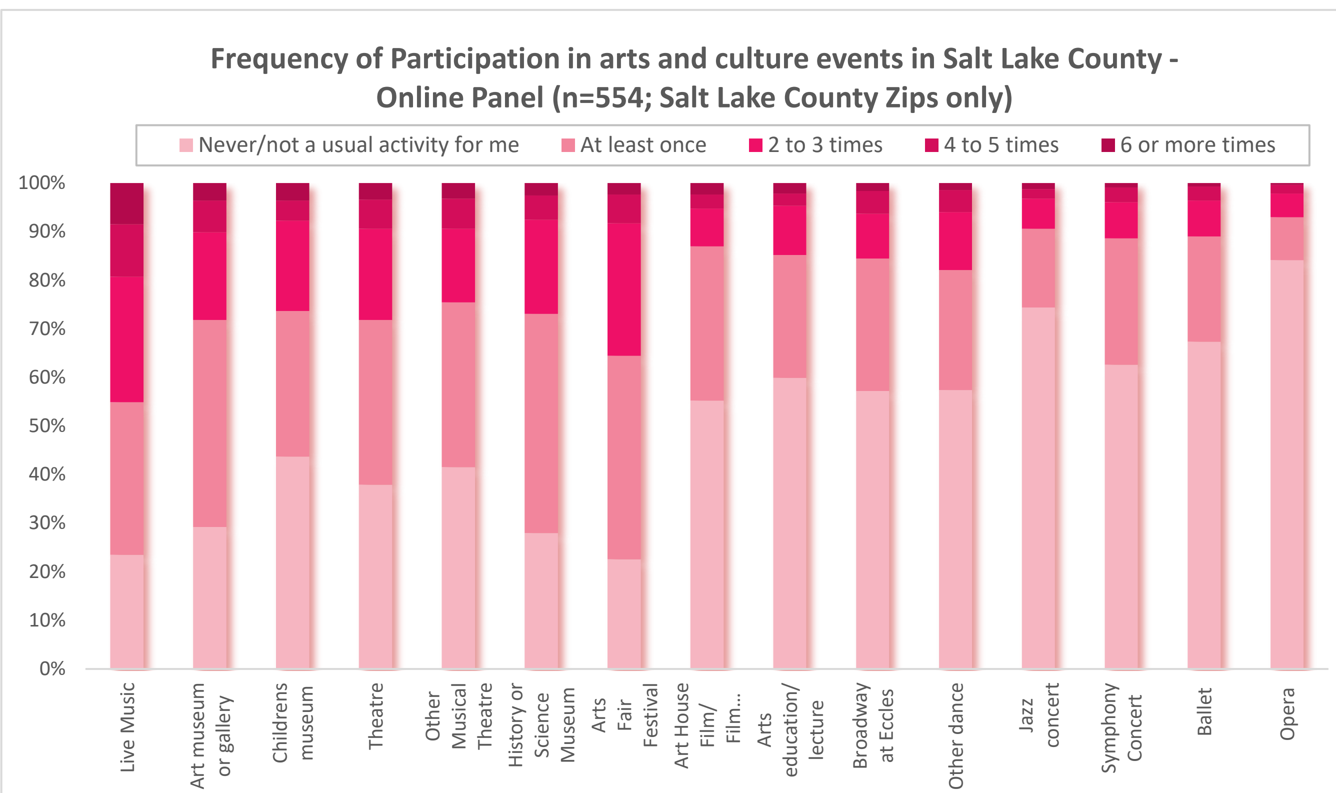

Figure 3: Participation in Arts Activities for Online Panel Respondents

Participation patterns by age shows differences in potential preferences as described by Figure 4 below (focusing on activities described as "attended four or more times a year"). Some key observations include:

- Younger respondents (under 45 years old) are twice as likely to attend live music frequently compared to any other activity: 30% attend four or more times a year compared to 15% who attend art museums/galleries and theatre performances.
- Middle age respondents (aged 45 to 54 years old) are most likely to attend live music compared to other activities.
- Older respondents, aged 55 and older, are much more likely to attend theatre at higher levels than other age groups: 33% vs. 22% and 15% for 45 to 54-year-old and under 45-year-old respondents, respectively.
- Older respondents are more likely to have high participation rates for film (16%), Broadway shows at the Eccles (18%), and symphony orchestra concerts (19%).
- Younger respondents are more likely to have higher participation rates for arts fairs and festivals (13%) and history and natural science museums (13%), indicating that perhaps younger respondents are slightly more diverse in their tastes, attending live music as well as visual arts at high rates.

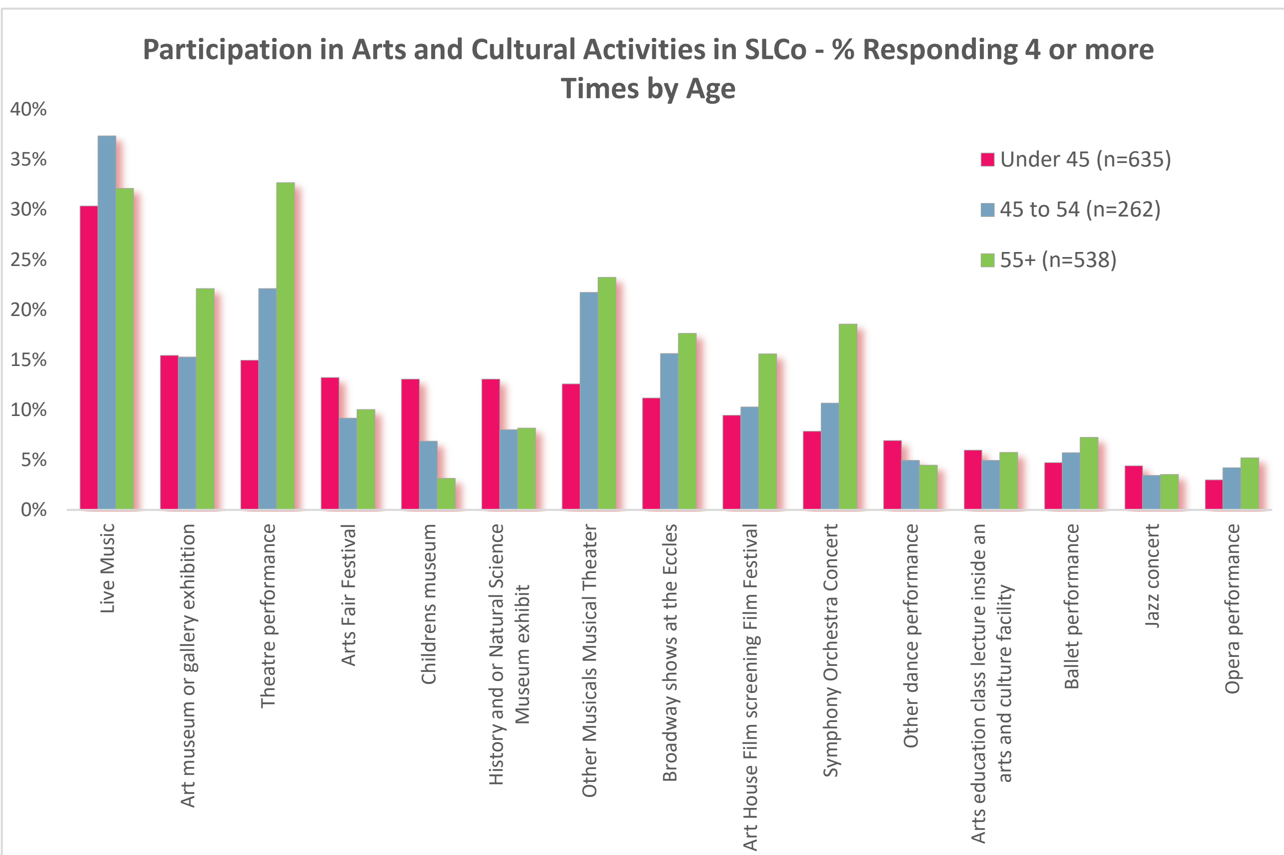

Figure 4: Attending Four or More Times by Age

Factors of Decision-Making

There are many factors that people take into account when making a decision to purchase a ticket and go to an arts and cultural event or institution. There are few people who do this by rote, even subscribers. We wanted to understand patterns of participation beyond current behavior. We included a question exploring the different factors that might influence in respondents' decision to attend arts and cultural activities. The factors tested ranged from artistic discipline and content, to cost, distance and recommendation from a friend or family member. Figures 5, 6 and 7 describe results for ArtTix, Millcreek and online panel respondents, respectively.

Overall, ArtTix and Millcreek respondents were mostly influenced by the discipline (60% and 54% recorded as 'very influential,' respectively). These respondents might first look to see whether it is a music concert, dance performance, musical theatre of visual arts before going further in considering other factors such as cost. For online panel respondents, 'cost of tickets' is the most influential factor. Given these are younger respondents this finding is not surprising, as younger populations tend to be more price sensitive due to typically lower annual income compared to older populations. For all three groups, the 'subject matter or content' was the second most influential of all factors, with the artist/title/cast following for ArtTix and online sample respondents (Millcreek respondents selected cost of tickets as third).

It is interesting to observe that the quality of the venue is only very influential for 37% of ArtTix buyers, the most experienced audiences of the three samples, indicating that venue is not as important for the majority of current ticket buyers compared to other considerations.

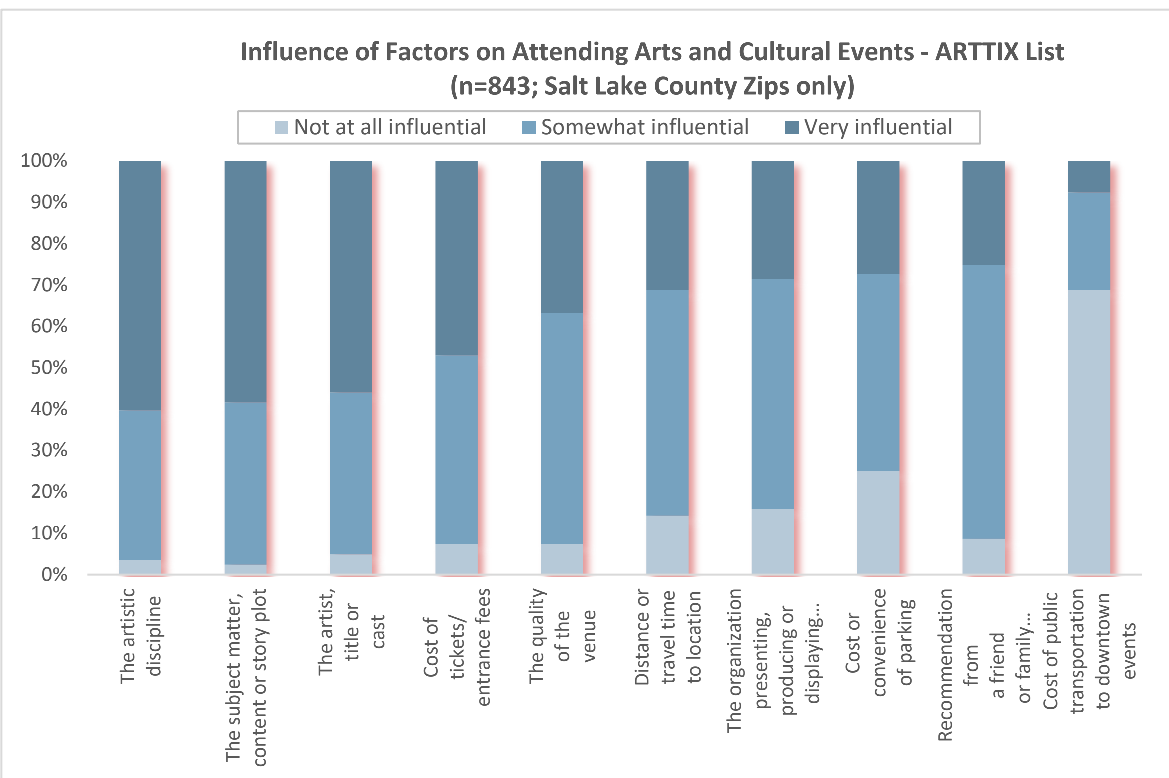

Figure 5: Influence of Decision-Making Factors - ArtTix Sample

The ‘cost of parking’ was 8th or 9th in order of most influential factors for ArtTix and Millcreek respondents, and 5th for online panel respondents. Prior to this analysis, there was concern about how much parking availability and its cost might be a factor. Results describe that for current buyers (a proxy for audience members), it is less a factor compared to the artistic event itself.

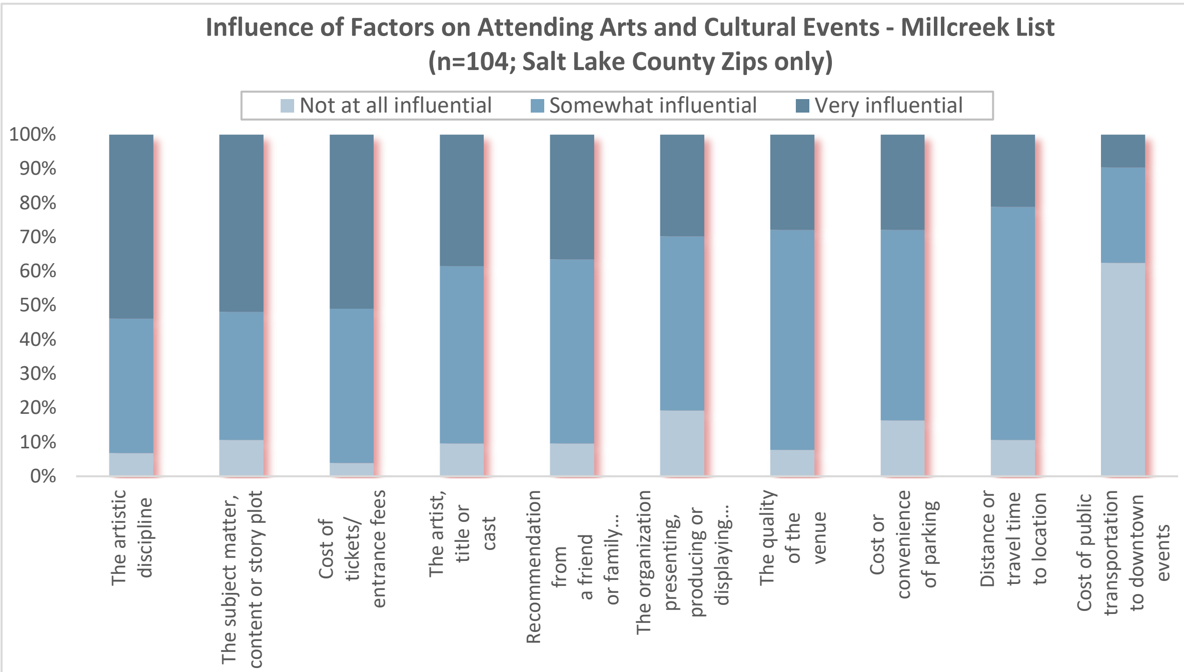

Figure 6: Influence of Decision-Making Factors - Millcreek List

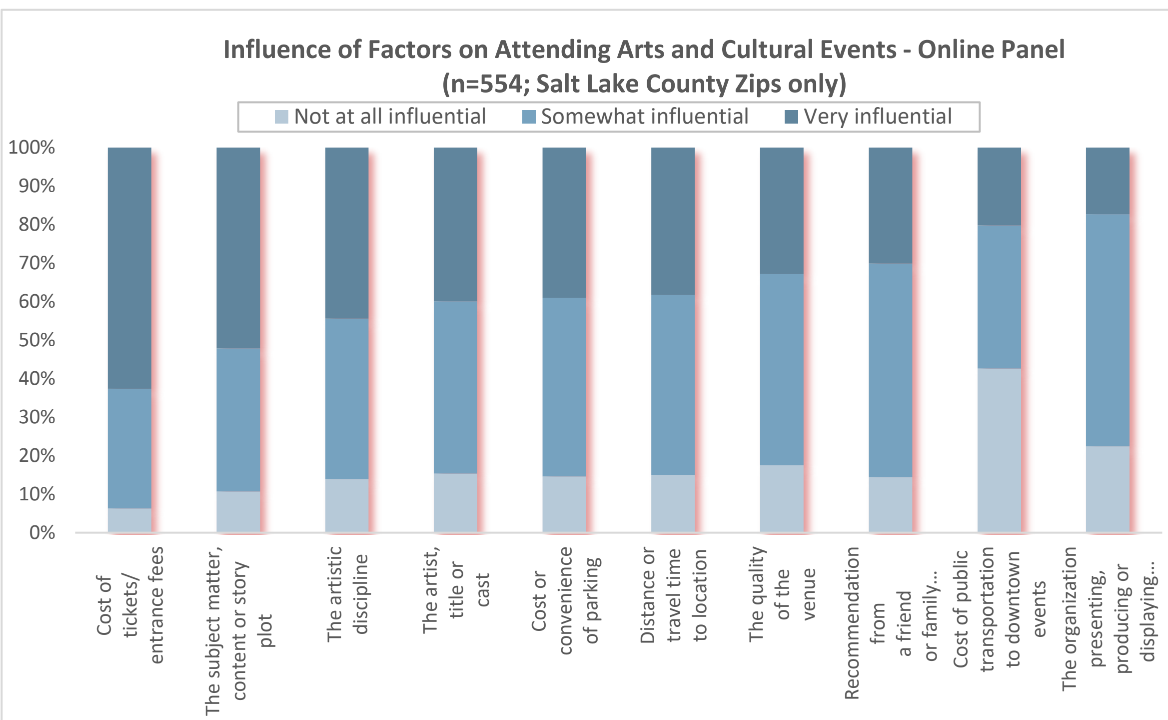

Figure 7: Influence of Decision-Making Factors - Online Panel

Analysis of decision-making factors by age describe a similar pattern to what is observed for online panel respondents: cost of tickets is most influential. Figure 8, below, describes results for decision-making factors cited as 'very influential' for three age groups. Again, 'subject matter or content' is second most influential, followed by 'artistic discipline' and 'the artist, title or cast.' Older respondents, aged 45 and older, are even more likely to cite the 'subject matter,' 'artistic discipline' and 'artist, title, or cast' compared to younger respondents. In addition, older respondents are more likely to be very influenced by 'quality of venue,' likely a result of their higher degree of experience attending events and so higher knowledge of venues; older audience members are also more sensitive to certain venue characteristics such as temperature, site lines, and accessibility characteristics.

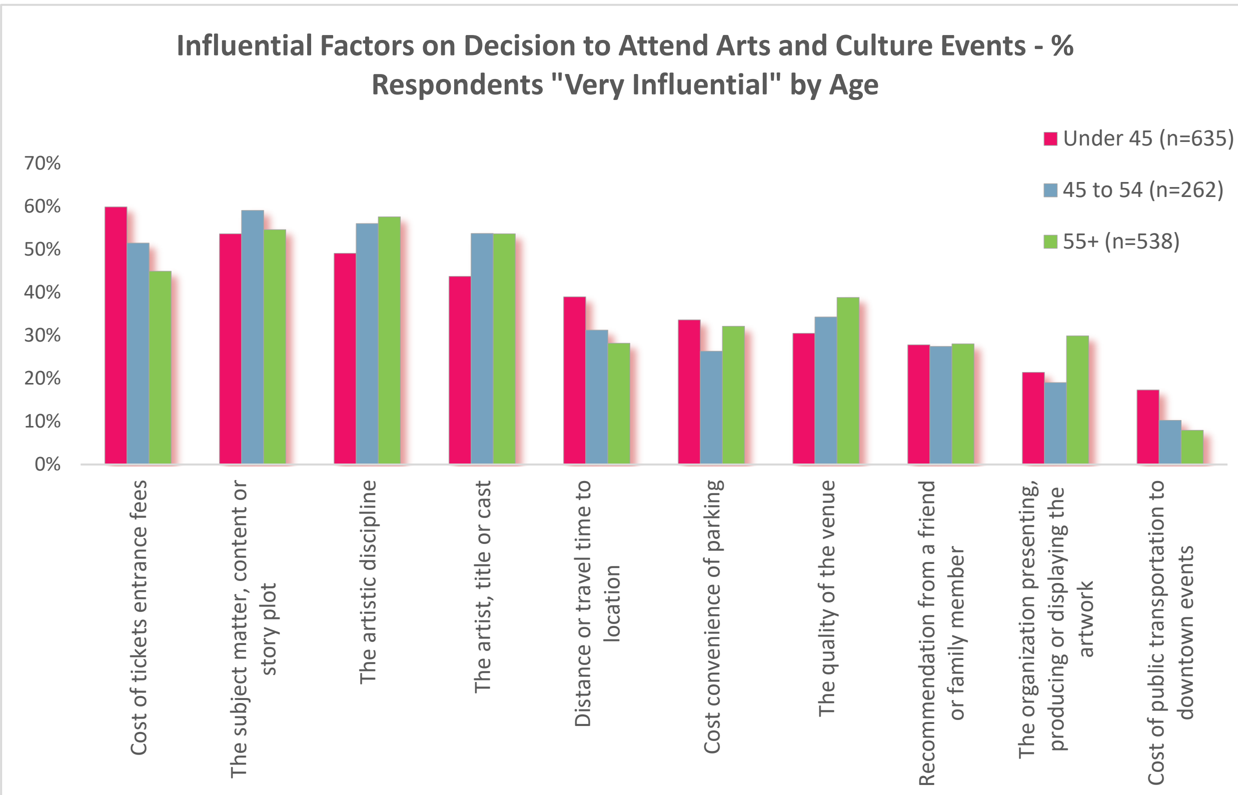

Figure 8: Percentage of 'Very Influential' Decision-Making Factors by Age

Barriers to Participation

Just as there are factors that tip decision-making towards attending an arts and cultural event, so too are there factors that stand in the way as barriers to participation. Respondents were asked to select their top barriers to participating. [2]

Figure 9 shows results by sample and for all respondents. In general, 'cost of tickets' is the highest barrier to attending (62% across all samples), followed by scheduling (44%) and then simple awareness of what is available (34%) and timing (also 34%). There are slight variations across samples that mirror results by age. For example, online panel respondents are slightly more price sensitive with 66% citing cost of tickets as a

[2] Multiple selections were allowed.

barrier and 31% citing cost and convenience of parking. Millcreek respondents are more likely to cite lack of awareness as a barrier (47%).

The county, partner jurisdictions and arts organization may have some control over some barriers such as location, cost of tickets, content, and awareness. However, barriers such as “too busy schedule” are difficult to address because they are mostly outside of the county or organizations’ control. Increasing awareness may boost participation – if more people know about what is available, they may make the choice to attend.

Respondents’ other barriers were about the need for and difficulty of with childcare and navigating family-friendly activities. The prevalence of this response indicates that there is an ongoing demand for opportunities for families to participate at a reasonable cost.

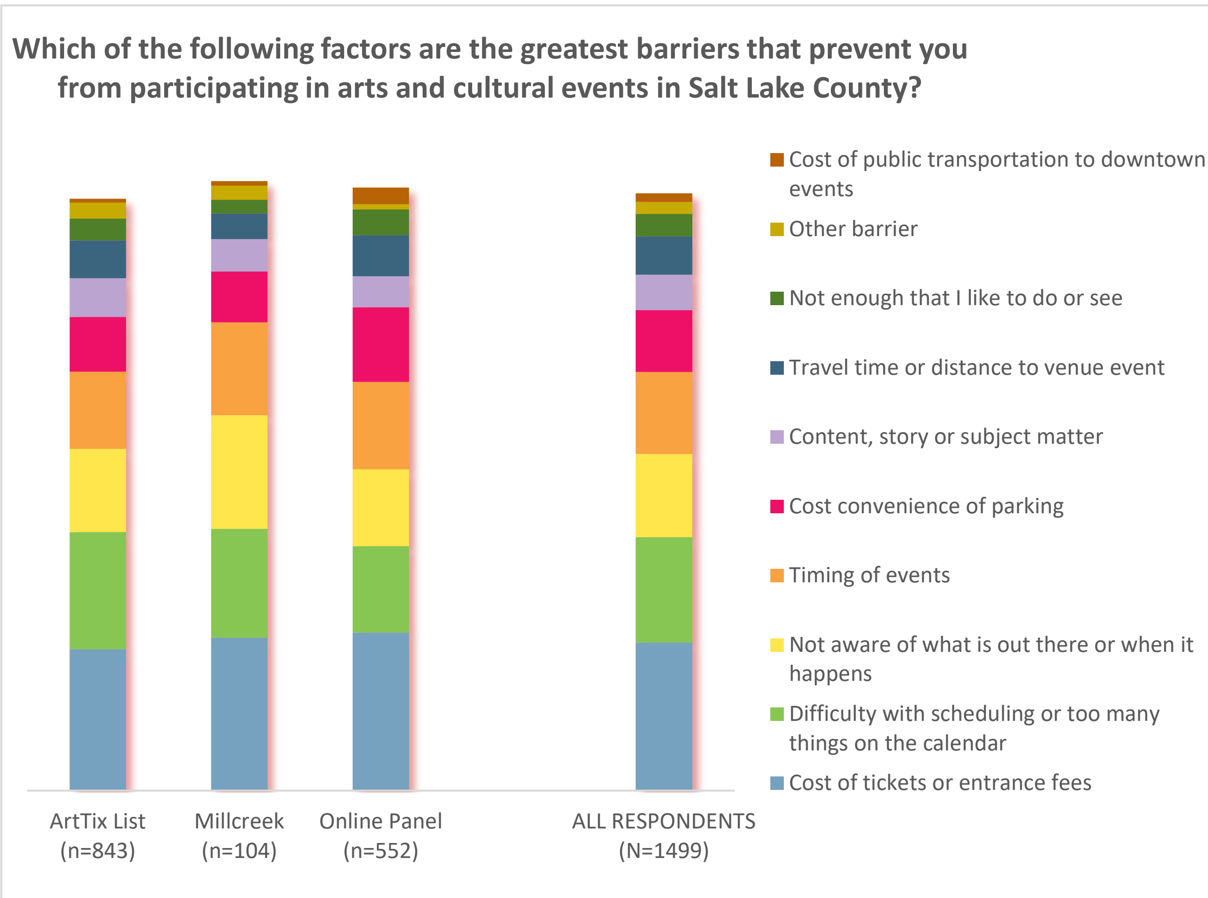

Figure 9: Barriers to Participation by Sample

Barriers by age (Figure 10) show similar differences to comparative samples. Younger respondents are more cost sensitive, similar to the online panel respondents overall. However, older respondents are more likely to cite ‘cost and convenience of parking’ compared to their younger counterparts (18% vs. 15% for 45 to 54-year-olds and 11% for under 45-year-olds). Respondents 45 to 54 years old are more likely to run into scheduling difficulties (52% citing difficulty with scheduling compared to 41% of under 45-year-olds and 43% of 65 and older respondents). This is likely due to increased family obligations at that age range are assumed to include more parent and family households where constraints on schedule are more acute.

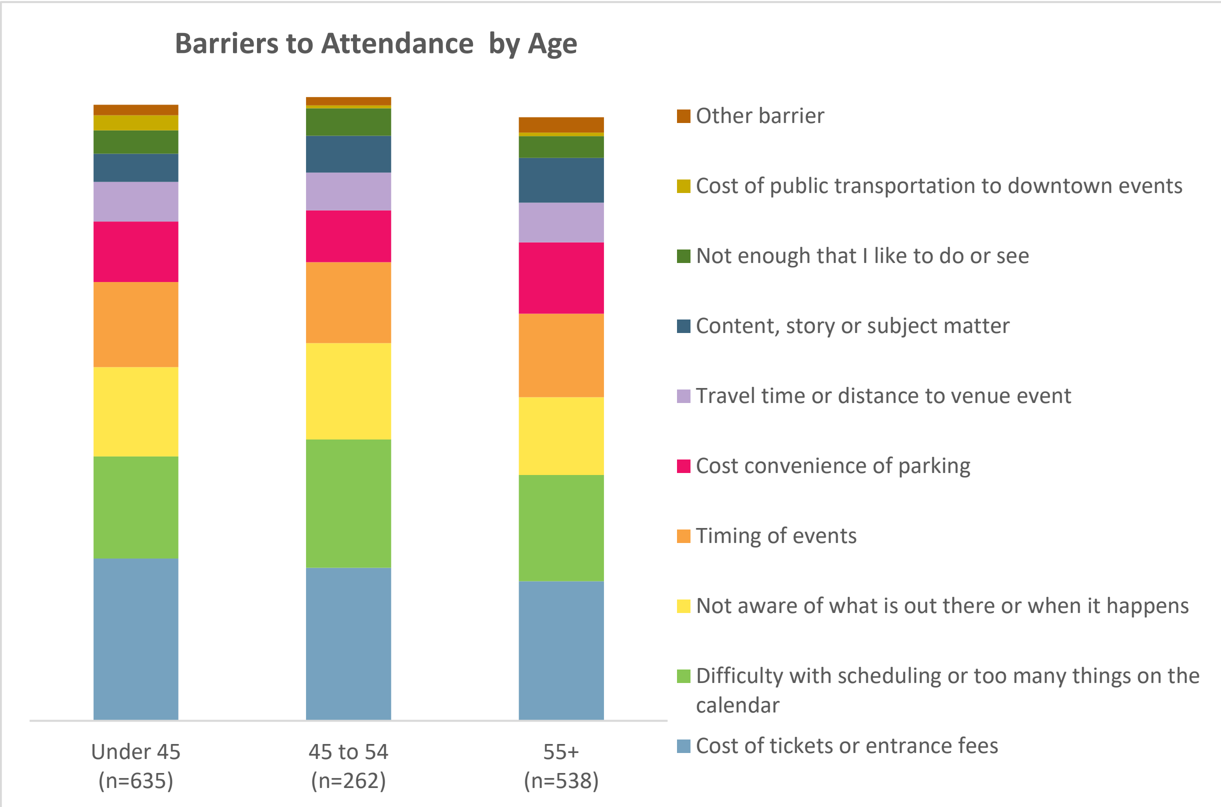

Figure 10: Barriers to Participation by Age

Drivetime

A key concern and question for organizations and public institutions providing arts and culture is the pressure of distance and drivetime for potential audience members should be a key concern for organizations and public institutions providing arts experiences. Arts organizations who responded to the organizational needs assessment survey noted multiple times that priorities for them included being able to be close to their community. In addition, observations from leadership interviews on the expanding population of the county put pressure on transportation infrastructure, increasing traffic and congestion. Even if the actual traffic is not increased, the perception of growth and burden of traffic is felt.

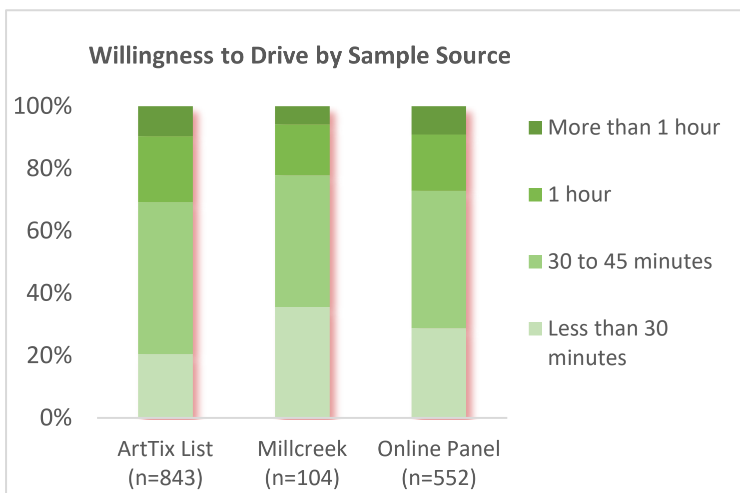

Figure 11: Drivetime Preferences by Sample

> *A great variety of quality cultural events for the size of our city as well as ease of access -I can ski during the day and be downtown for a cultural event in the evening.*

It was important then to test the limits of residents' willingness to drive to attend an arts and cultural event in the county. Figures 11, 12 and 13 compare willingness to drive, or drivetime preferences, by sample, age, gender and race/ethnicity.

Overall, the majority of respondents across all samples are willing to drive up to 45-minutes to attend an event of interest. This bodes well for currently available and ready facilities that are approximately currently that distance from the southern and western parts of the county. These results may be due to the fact that people are used to what is already available to them (most facilities being concentrated in downtown Salt Lake City) and so don't mind the drive because they enjoy the experience.

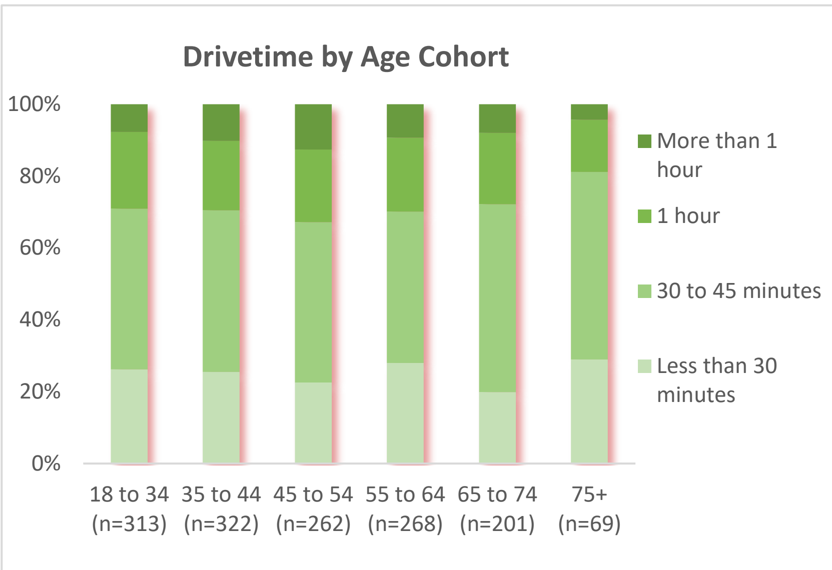

Figure 12: Drivetime Preferences by Age

In terms of age, there is little difference across the age groups. Slight variations reveal that both the youngest and the oldest cohorts are slightly less likely to be interested in driving beyond the 45-minute mark (71% of 18 to 34-year-olds, 72% of 65 to 74-year-olds and 79% of 75+ respondents; see figure 12). Respondents in the 45 to 54-year-old age group are more willing to drive an hour or more (20% up to an hour and 13% beyond the hour). Given that this age group often has more barriers due to competing schedules and family needs (see figure 10 above), it is possible they are more willing to drive further distances because attending an event takes slightly more effort and so it turns into a special occasion.

There is little to no difference in regard to female and male respondents; the only exception is that male respondents are slightly more likely to be willing to drive farther than women (23% up to an hour and 11% beyond an hour compared to 18% and 8% of female respondents). In regard to differences between white respondents and

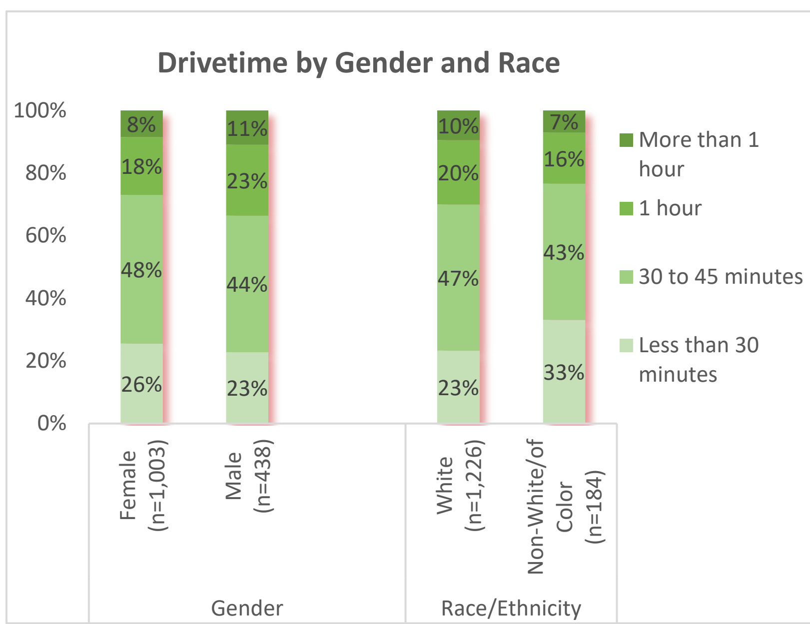

Figure 13: Drivetime Preferences by Gender and Race/Ethnicity

respondents of color, respondents of color are much less likely to drive greater distances, with 33% saying that within or less than 30 minutes is their preference, compared to 23% of white respondents. Note that ticket buyers are traditionally and typically more likely to be comprised of a majority white population, and as discussed above, existing ArtTix buyers are more accustomed to driving to attend current offerings.

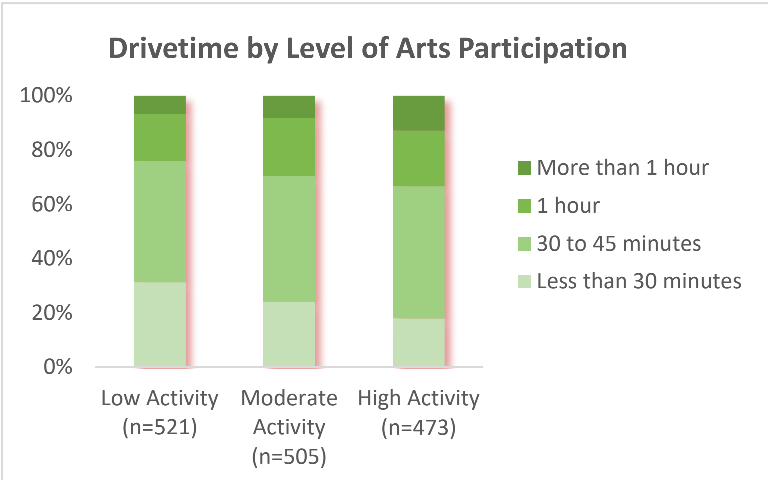

Figure 14: Drivetime Preferences by Level of Participation Activity

This assumption is born out when comparing level of participation by willingness to drive. To facilitate analysis, an aggregate score of activity level was created by summing responses across all activities. A grouped variable was created based on the score, divvying respondents into low, moderate, and high-level activity. Figure 14 compares drivetime preferences between each of these groups. It is clear from this chart that those who attend at lower levels are much more likely to prefer a 30-minute or less drive than those who attend at even moderate or high levels (31% vs. 24% and 18%, respectively). On the high end, high-level activity respondents are more likely to drive more than an hour to their destination (13% vs. 8% and 7%, respective to moderate and low-level respondents). While it is heartening that current buyers (and by proxy, audience members) are accustomed to and willing to drive across the county, it is important to note that those who only attend on an irregular basis might have to be persuaded by other factors (artist, cost of tickets, etc.) before committing to an over 30-minute drivetime.

Reflecting on Giving Practice, and Quality and Growth of the Sector

In the organization needs assessment, respondents were asked about their potential for leadership gifts, future growth in the sector, and growth of audiences. For this panel and ticket buyer survey, respondents were asked similar questions to look into the future and state their perceptions of growth and future donations. Regarding donations, respondents were first asked whether or not they had contributed a monetary donation to an arts or cultural group in the past 18 months. Figure 15 describes those who answered 'yes' to this question.

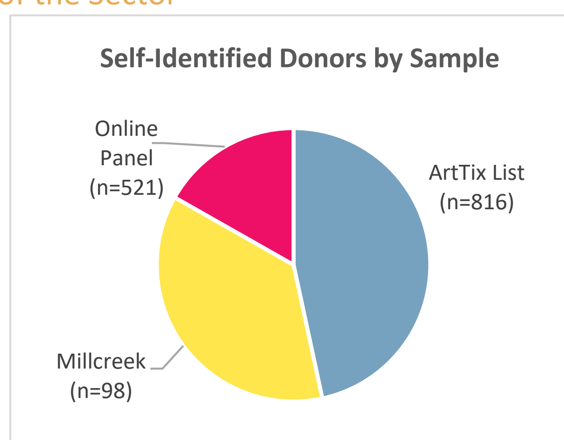

Figure 15: Self-Identified Donors by Sample

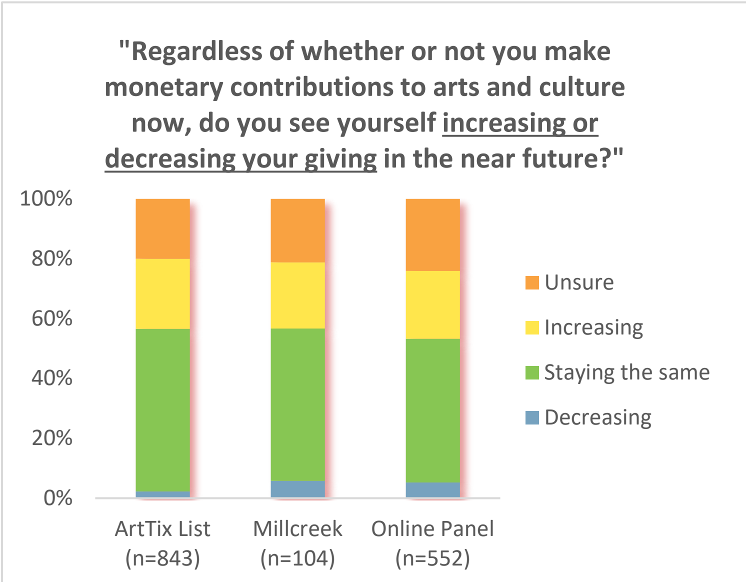

Figure 16: Anticipated Giving in the Future

Not surprising, the ArtTix list and Millcreek list respondents contained the highest proportion of self-identified donors (53% and 42% vs. 19% of online panel respondents). Older respondents, white respondents and male respondents were also more likely to self-identify as donors (not shown).

A follow-up question asked about potential future giving regardless of current giving practice. Overall, most respondents stated their giving would stay the same, with only 22% to23% stating that they anticipated an increase. This mirrors organization's' perceptions that their current level of leadership donors will likely stay the same (44%). However, organizations were slightly more positive about an uptick in donations (31% anticipated that it would increase). Although it is not certain the level of giving represented in this ticket buyer/online panel respondent sample, the results here show a slightly more conservative view of giving levels. This means that organizations will likely have to continue to rely on alternative sources if they are struggling or develop new ways to engage and encourage new donors to give or existing donors to give more.

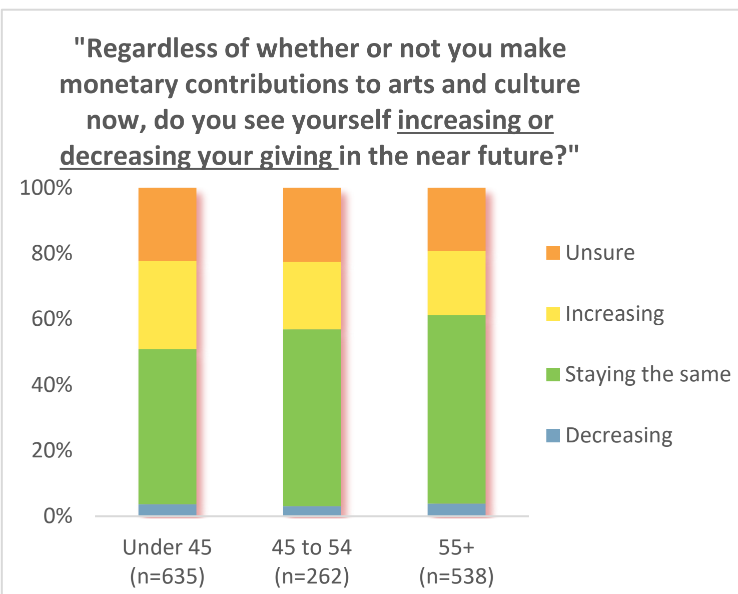

Figure 17: Anticipated Giving in the Future by Age

Younger respondents are not as likely to have given any financial contributions in the last 18 months, although they are slightly more likely to anticipate giving more in comparison with their older counterparts (27% vs. 21% for 45 to 54-year-olds and 20% for those 55 and older; see figure 17).

In other questions looking to the future, respondents were positive overall. At least half to more than half of respondents across all samples think the quality of arts and culture activities are increasing (see Figure 18). Similarly, at least half to almost 80% of respondents think there are more offerings than there were five to ten years ago.

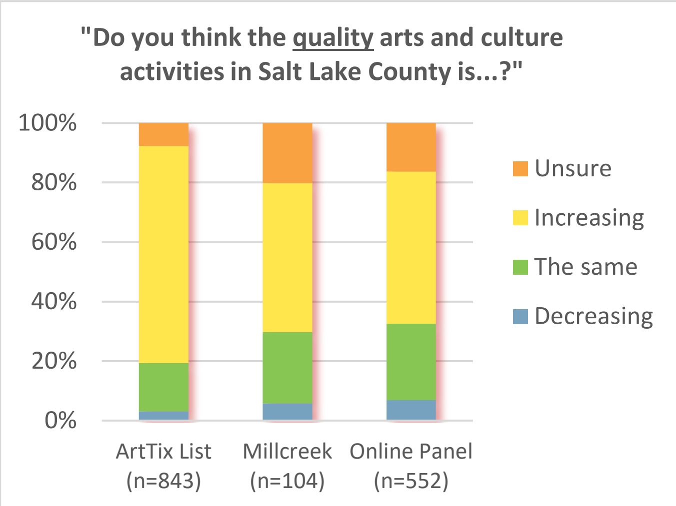

Figure 18: Perceptions of Quality by Sample

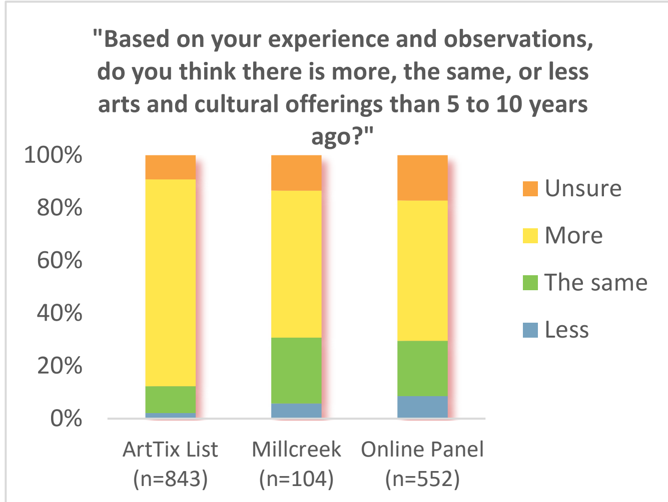

Figure 19: Perceptions of Growth of Sector by Sample

> *A great variety of quality cultural events for the size of our city as well as ease of access -I can ski during the day and be downtown for a cultural event in the evening.*

These findings were culled from the open-ended responses, reflecting on the strength of Salt Lake County's offerings. Most respondents spoke to the diversity of the arts offerings in their responses. Over 40-year-old respondents used that exact word to describe their experience of the arts – diverse or diversity. Other descriptions included discussion of the variety of experiences and that there is always something of interest, if you can find it. Further analysis by age shows that older respondents are positive about quality and about the amount of arts and culture in Salt Lake County (see Figures 20 and 21).

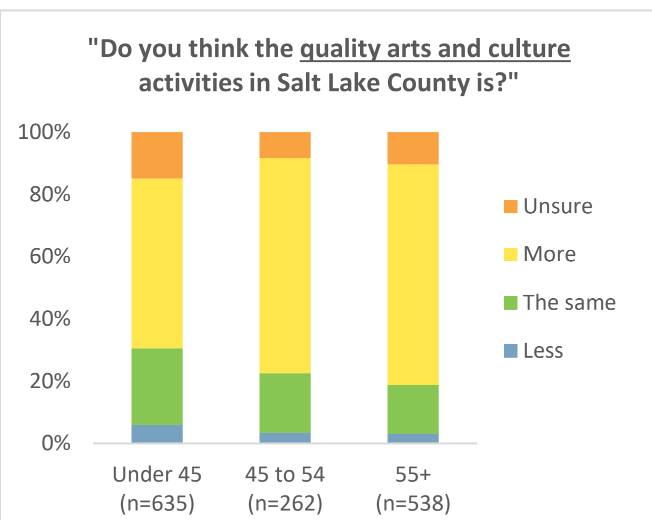

Figure 20: Perceptions of Quality by Age

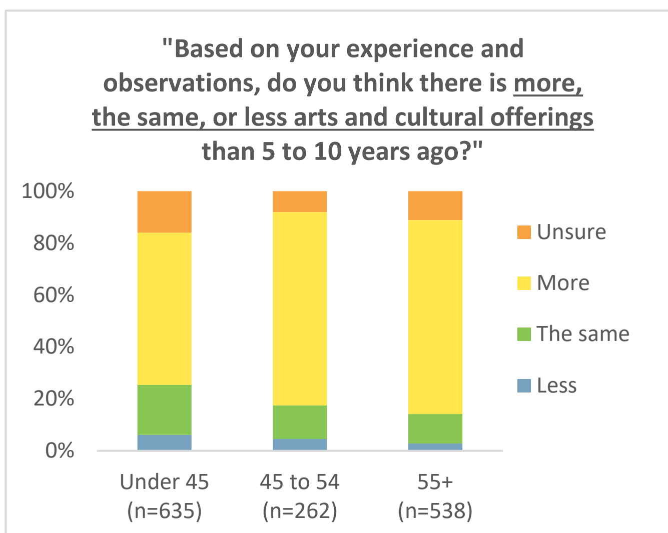

Figure 21: Perceptions of Growth of the Sector by Age

Reflections on Salt Lake County's Priorities and Vision

Like the organizational needs assessment, ticket buyers and online panel respondents were asked to rank priorities and strategies for Salt Lake County's vision for the future. Overall, respondents were focused on 'renovating and updating existing facilities' and 'supporting and/or creating greater variety of performing arts spaces.' This makes sense given the inherent bias in the sample towards performing arts facilities. Public art came in ranking third for priorities across all samples (see Figure 22).

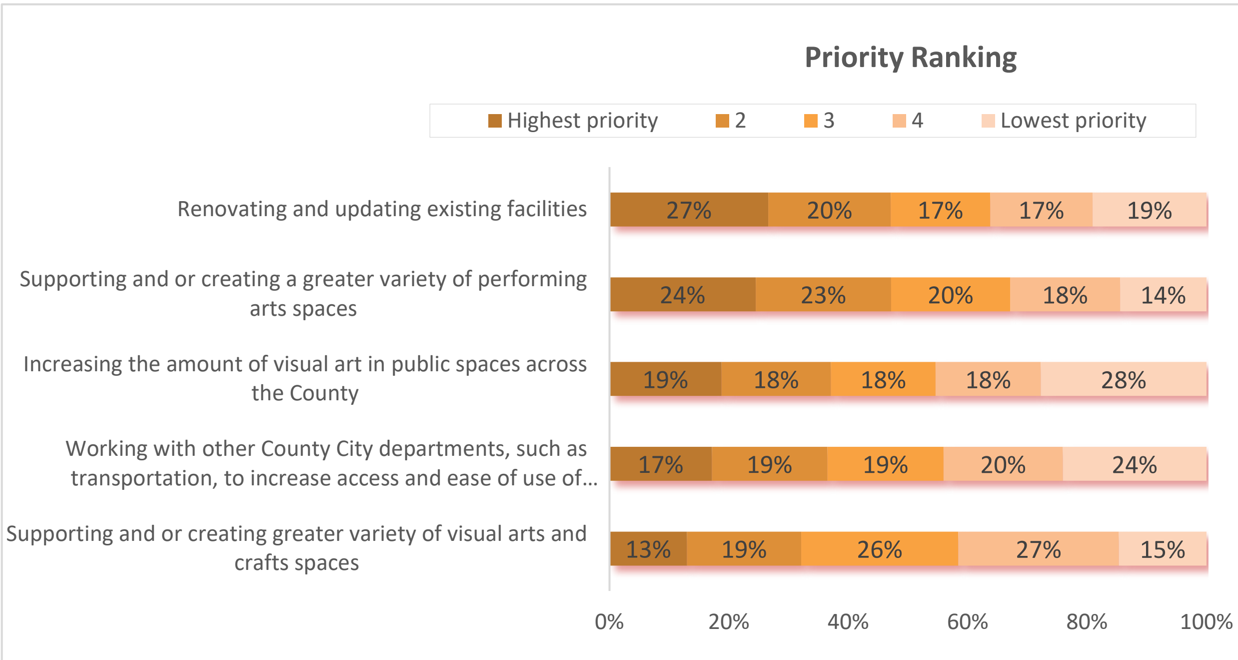

Figure 20: Ranking of Salt Lake County Priorities

There are slight differences in ranking when comparing responses by sample (see Figure 23). ArtTix respondents are slightly more likely to rank public art and working with other municipalities as higher than other samples. Online panel respondents ranked 'renovating existing facilities,' 'supporting and creating more visual arts and crafts spaces,' and 'supporting greater diversity of performing arts facilities' slightly higher than other samples. This is somewhat counterintuitive because this sample was less active in attending a range of performing art. It is possible that, on average, online panel respondents are weighing the diversity of visual and performing arts the same (i.e., they are interested in supporting greater diversity of all types of spaces).

In regard to age differences, younger respondents prioritize public art higher than other age groups, and much higher than those in the 65 and older respondent groups. All other priorities are ranked higher for the older age categories, with 75-year-olds and older respondents especially strong in their ranking for 'working with other municipalities.'

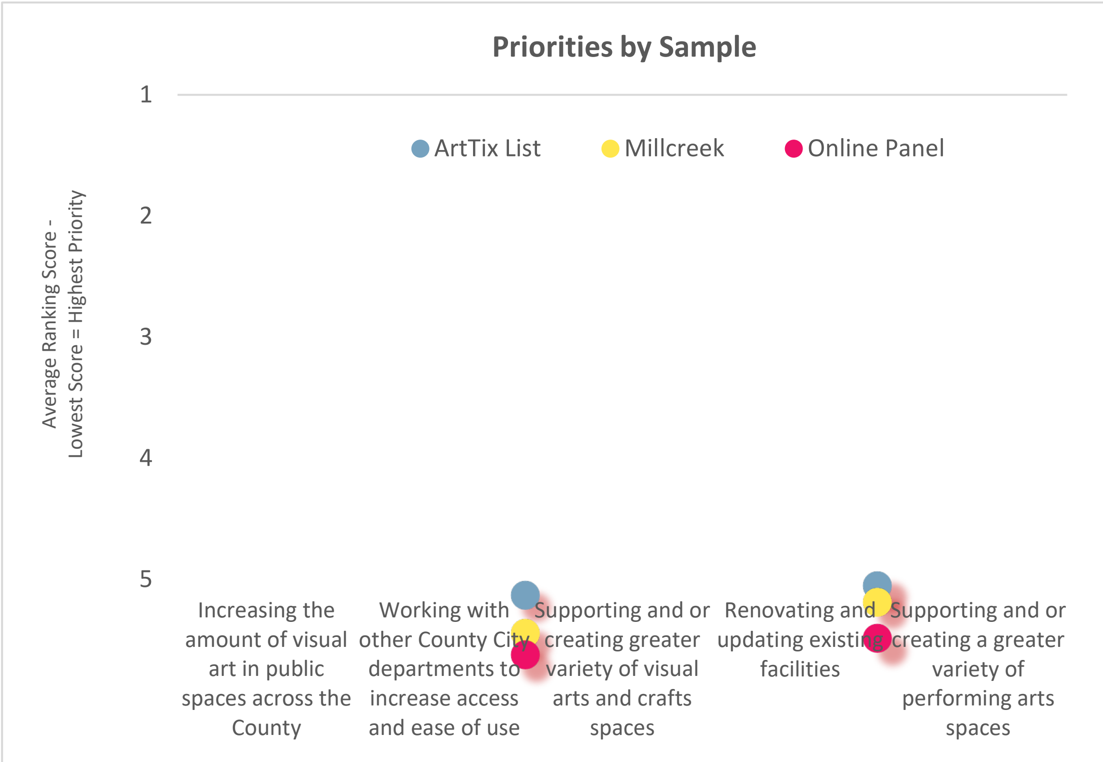

Figure 21: Ranking of Salt Lake County Priorities by Sample

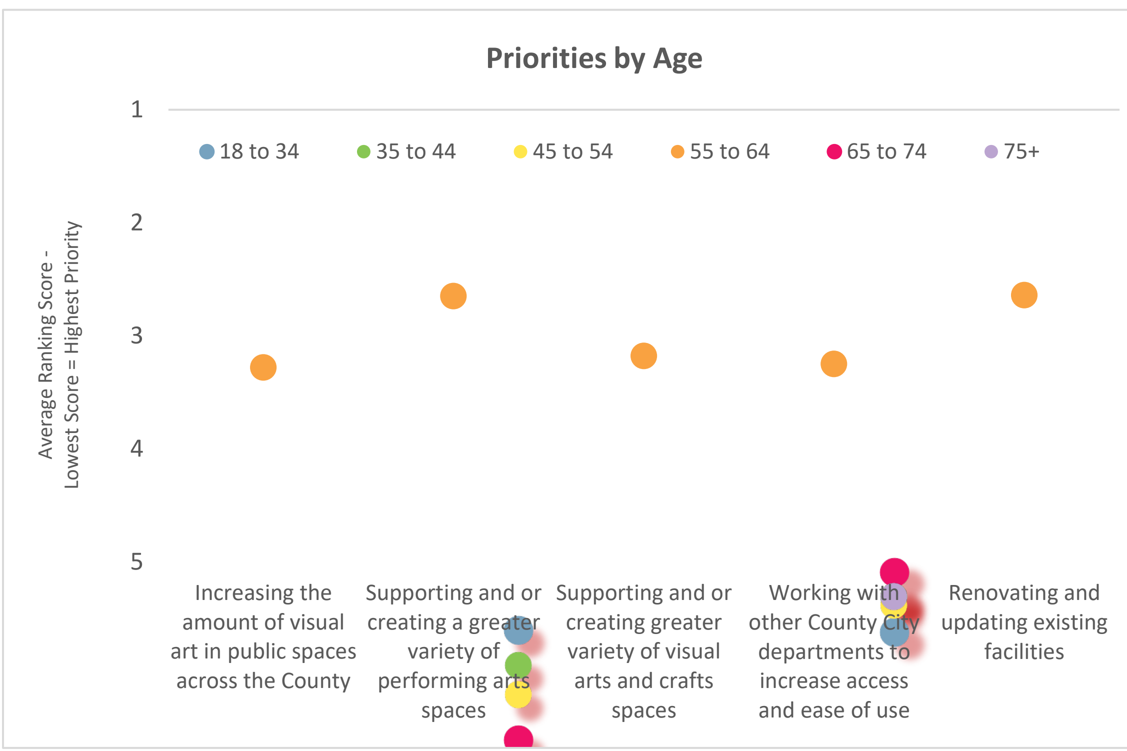

Figure 22: Ranking of Salt Lake County Priorities by Age

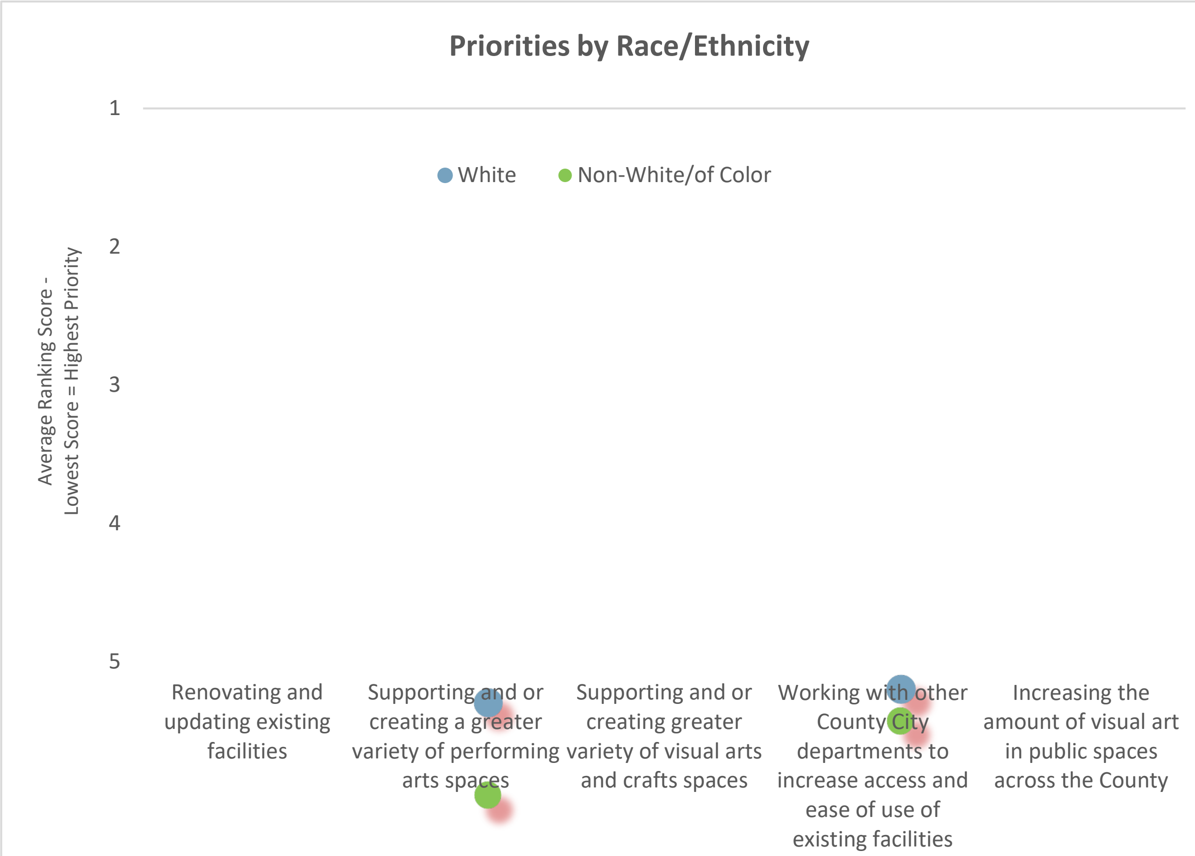

Figure 23: Ranking of Salt Lake County Priorities by Race/Ethnicity

Priority ranking between white respondents of respondents of color differentiated along multiple strands – white respondents were more likely to rank renovation and greater variety of performing arts facilities higher. Whereas respondents of color ranked supporting visual arts and increasing public art as greater priorities.

Importance of Arts and Culture

One of the core questions carried over from the 2008 planning process was to test how buyers and residents value arts and culture in their own lives and for the community. Figures 26 and 27 show responses by sample.

> *If you know where to look you can find unique events and we have amazing talent here.*

Although nearly two-thirds of all respondents consider arts and culture important to them personally, both ArtTix and Millcreek respondents were more likely to rate personal importance higher (83% and 75% state that arts and culture is 'important' or 'very important,' respectively compared to 42% of online panel respondents). Similarly, a majority of respondents – approximately 8 in 10 – consider arts and culture important to their community, with ArtTix and Millcreek respondents more likely to consider arts and culture important (see Figure 27). It is interesting to observe that although some may not be as strong in their value of arts and culture to themselves on an individual basis, they still feel strongly about the importance of arts and culture to the community. This echoes leadership interview findings that there is an underlying strong value and support for arts and culture in Salt Lake County as a whole.

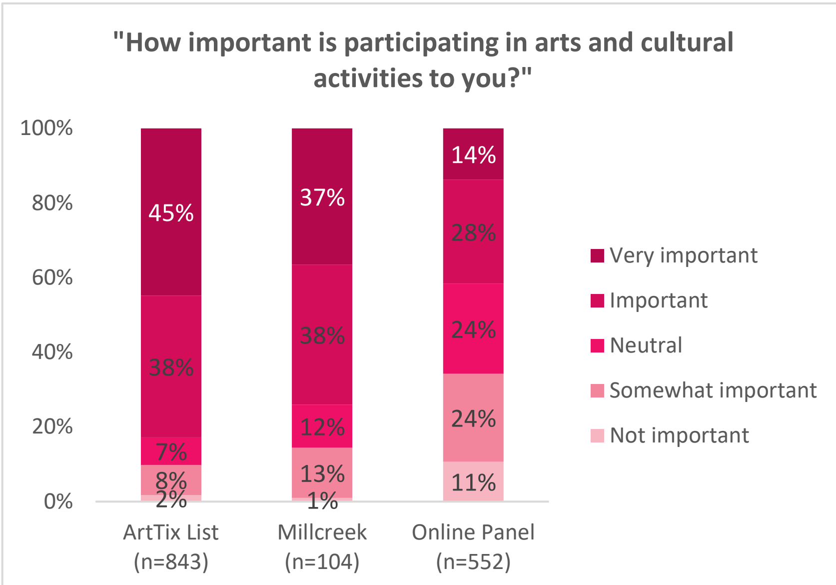

Figure 24: Importance of Arts and Culture to Individual by Sample

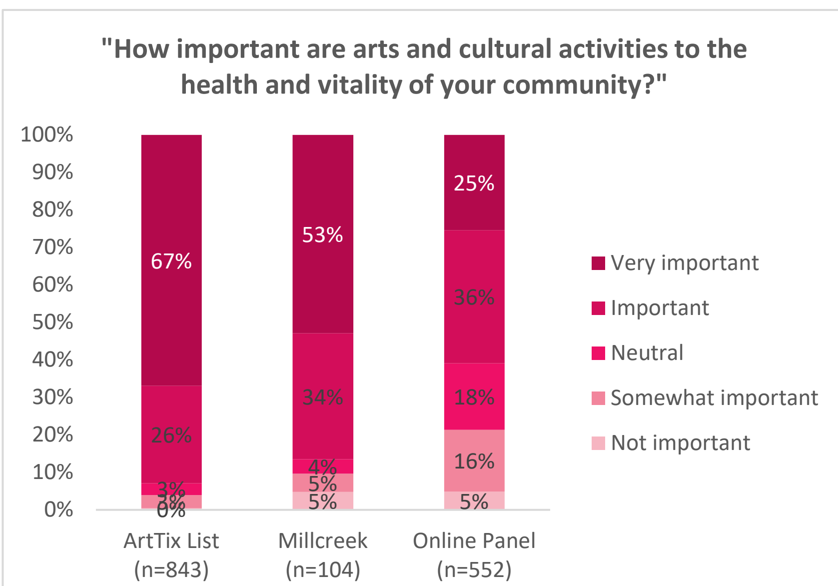

Figure 25: Importance of Arts and Culture to Community by Sample

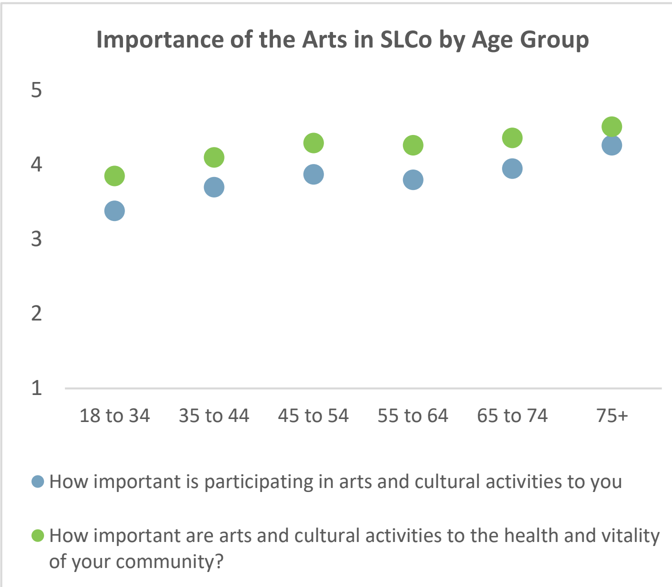

Figure 27: Importance of Arts and Culture by Age

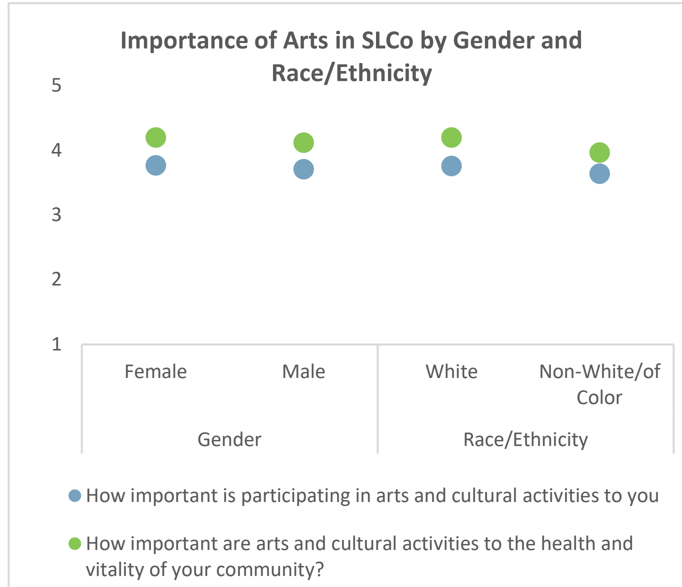

Figure 26: Importance of Arts and Culture by Gender and Race/Ethnicity

A variety of events - especially produced by local arts councils. There are so many dedicated volunteers who provide amazing arts experiences for their communities.

In comparing the importance by age (see Figure 28), it is clear that rating of importance for the arts and culture in Salt Lake County, both on a personal and a community level, increases with age. This makes sense as older respondents are more active in attending arts and culture events, and additional analysis reveals that participation frequency is positively correlated with the degree to which a respondent rates importance (i.e., more active respondents also were more likely to rate the importance of arts and culture higher than less active respondents).

There is little difference between male and female respondents in regard to their rating of importance. White respondents were slightly more likely to rate arts and culture as important compared to respondents of color (see Figure 29).

Conclusion

The results of this survey effort underscore and supports other data collected during this Master Plan research phase process. Salt Lake County residents appreciate and value the arts and culture in their region, particularly the performing arts. Residents believe the quality of the offerings are high and younger people are willing to start contributing more money towards the arts in the future than they do now.

Salt Lake actually has quite a range of artistic venues throughout the year and has continued to grow over the past decade.

Discipline, artist and content are the primary decision drivers, taking precedence over how long it takes to travel to the event. For some, cost is the factor that keeps them from attending more. In addition, barriers like scheduling and not knowing what is available, keep people from participating. There is opportunity to focus on building awareness and leverage the strong interest in the arts that already exists.

There is also opportunity to expand and reach out to those who don't participate as much as current ArtTix buyers do through increased public art projects and support for existing institutions, including art museums, children's museums and history and science museums already serving the population.

Advertising, and awareness, spreading out of opportunities throughout the year so residents can more easily balance their busy schedules with a variety of scheduling options, and cost and convenience as key things that they would like to see change. While it may not be possible to address all of these challenges, it is heartening to see the outpouring of love and pride that people have for this region and for the organizations, arts councils, public agencies and facilities that make the arts thrive across the county.

Salt Lake City is the primary point for tens of thousands of people in the regional urban and suburban areas to express their uniqueness and talents.