



SALT LAKE COUNTY
SUMMER 2020 CONSUMER SENTIMENT SURVEY



SURVEY METHODOLOGY

SAMPLING, MODE, & MARGIN OF ERROR

- For this survey, 800 Salt Lake County residents were sampled via Random Digit Dialing (RDD) and targeted (confirmed) County resident telephone sample. Completed surveys were conducted via live dial telephone interviews. The data include 400 interviews completed via cell phone numbers.
- The data were weighted to reflect U.S. Census estimates of Salt Lake County demographic composition from the American Community Survey. Weights were used to ensure that the data reflected the population of Salt Lake County, specifically in regards to age, gender, ethnicity, income, and education.
- Live telephone interviews were conducted July 5-9, 2020. *This survey was conducted as a follow-up to a survey fielded May 18-26, 2020.*
- The margin of error for a survey with 800 responses is approximately ± 3.46 percentage points.



1. There is substantially more concern about the present and future of the coronavirus crisis than there was in May 2020—**only 16% of respondents said that they believe the worst of it is behind us and a majority still believe the worst is yet to come.**
2. In a reversal of the tides compared to just six weeks earlier, a **majority of residents now report that they are more concerned about the public health impacts** of the outbreak than the effects of the virus on the economy.
3. Those **residents most concerned about lifting restrictions intended to contain the spread of coronavirus too quickly are still those with an annual HHI under \$50,000**, and this group of residents express even more concern about lifting those restrictions than they did in May.
4. Local business, county officials, city officials, and Governor Herbert all saw an approximate **10-percentage point decline in “coronavirus response favorability.”** In terms of the coronavirus response, President Trump remains by far the least popular of entities included (66% “Fair” or “Poor”) but did not decline in popularity since May.
5. Across the board, there has been a **significant increase in support for safety measures that involve requiring facemasks since May.** This includes residents who say they are more concerned about the impact on economy than on public health and those who say they are anxious for local officials to lift restrictions.
6. Throughout the county, residents have become **more comfortable eating out in restaurants since May.** This is true of residents in all planning areas.

THINGS TO REMEMBER

COVID-19 IMPACT

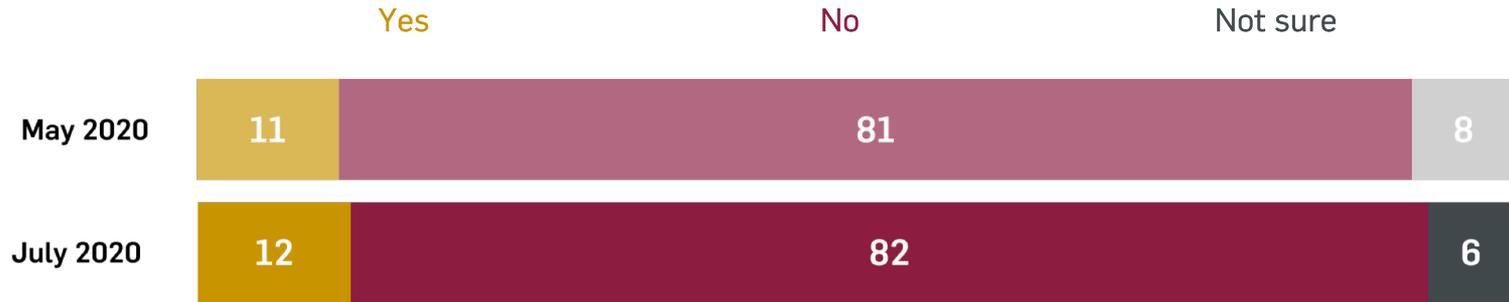
PERSONAL AND COMMUNITY EFFECTS

“VERY MAJOR” LIFE CHANGE FOR 1 IN 3 RESIDENTS

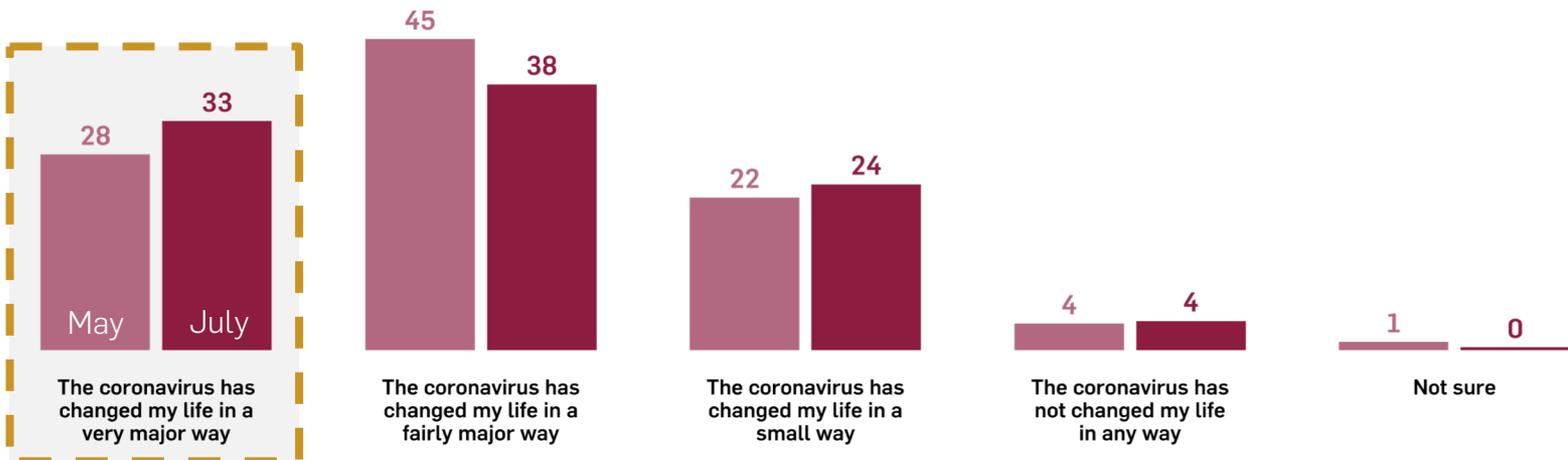
The proportion of county residents who say that the coronavirus has changed their lives in a very major way has increased to 33% since May. However, the percentage of respondents who report someone in their household having contracted the coronavirus has remained relatively constant.



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



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

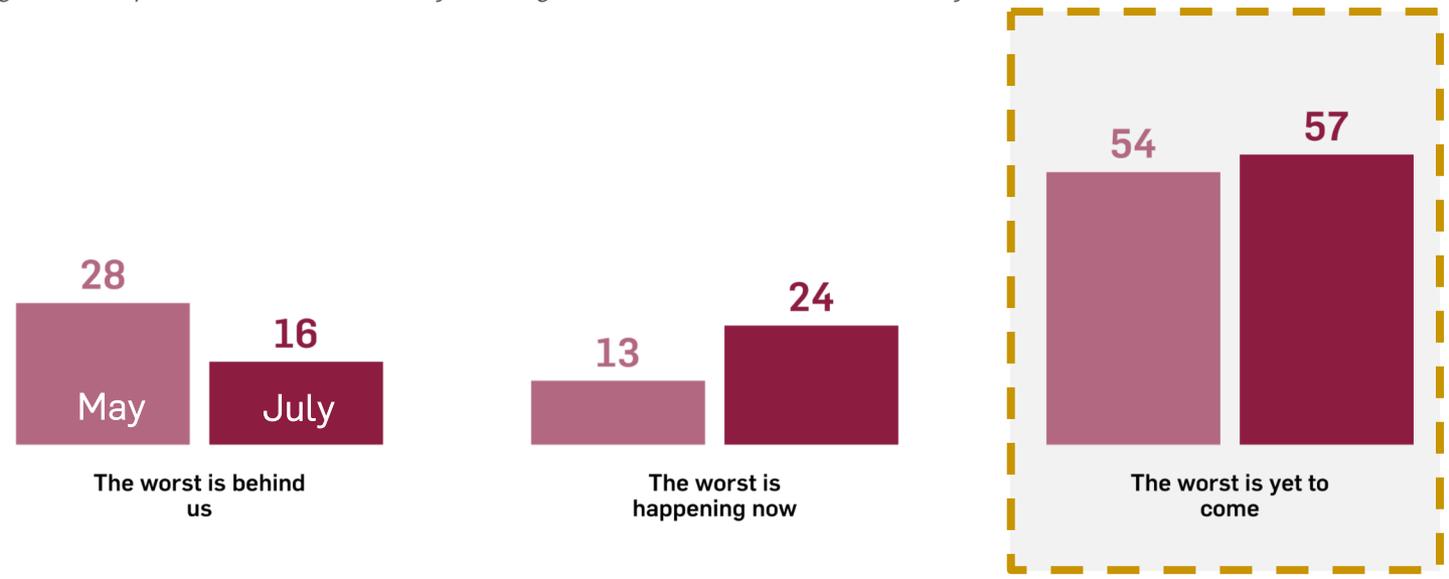


MAJORITY FEAR THE WORST IS YET TO COME

The share of Salt Lake County residents who think the worst of the coronavirus “is behind us” has nearly halved since May, with the majority of residents are bracing for worse conditions yet to come. When asked how they think Salt Lake County residents have handled the spread of the coronavirus, 2/3 say they have done a “poor job.”



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



Which of the following statements comes closest to your view about coronavirus cases in Salt Lake County in the past week: “Salt Lake County residents have done a [good/poor] job of containing the spread of coronavirus and limiting new cases”



POLICY PERCEPTIONS

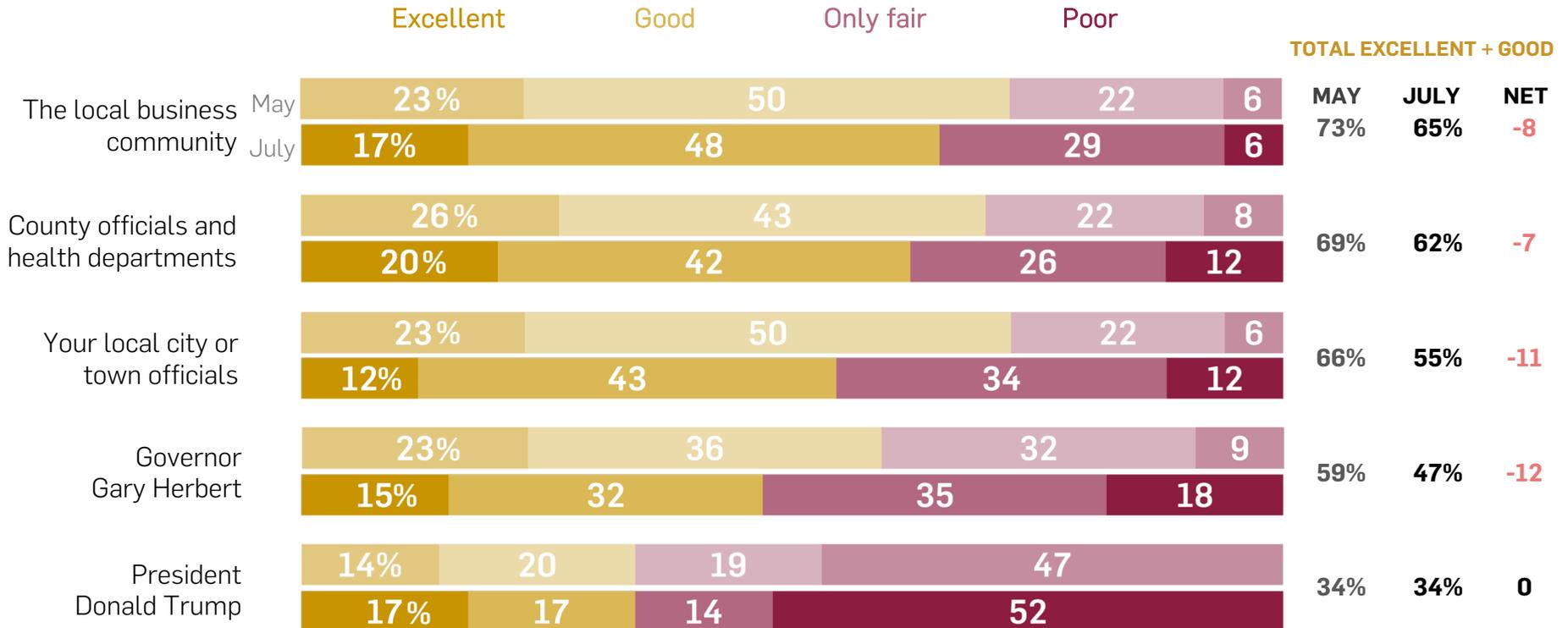
CURRENT APPROACH AND FUTURE CONCERNS

TRUMP RATINGS EVEN, ALL OTHERS DOWN SINCE MAY

All leadership entities have seen decreased approval in past months with respect to the coronavirus outbreak. President Trump's rating became more polarized (increases in both "Excellent" and "Poor") while remaining constant in terms of combined positive approval, while all other entities saw a relatively uniform decline in approval of about 10 percentage points on average. Trump remains the least popular entity of the five.



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

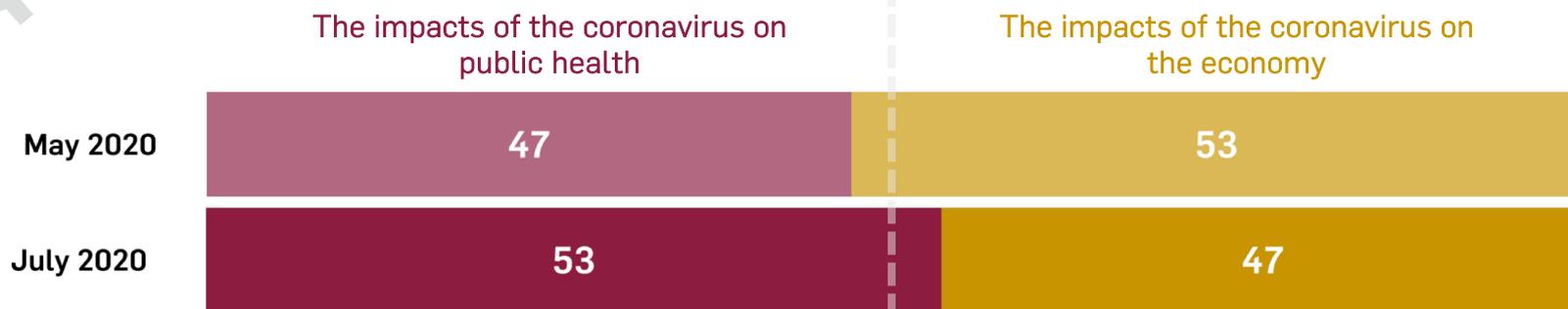


TIDES TURN TOWARD CONCERN FOR PUBLIC HEALTH VS ECONOMY; ANXIETY LINGERS REGARDING RESTRICTIONS

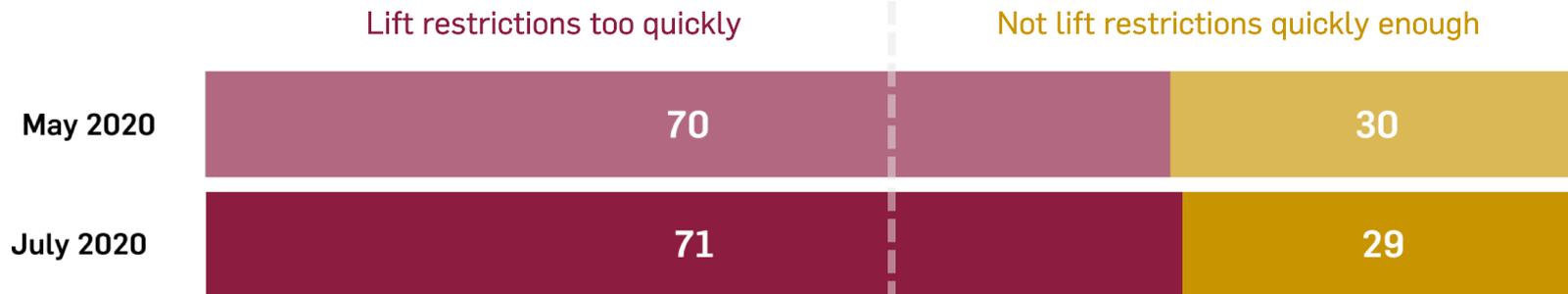
The share of residents who are more concerned about the impact of the coronavirus on public health compared to the economy crossed the 50% threshold between May and July. The share of residents who are concerned that the state will lift restrictions too quickly remained constant at about 7 out of 10 Salt Lake County residents.



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



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



SLCo (with the exception of Salt Lake City) moved to "Low Risk" or Yellow Guidelines set forth by the State on June 12, 2020, approximately three weeks after the May survey was concluded (5/18-26) and three weeks prior to the fielding of the July survey (7/5-9).

SHIFTS FOR LOW-, MIDDLE-INCOME RESIDENTS

Since May, high-income residents remain similarly concerned about the economy in contrast with public health while residents making less than \$100,000 grew significantly more concerned about public health. Results from the lowest income residents in particular illustrates support of the restrictions needed to limit the spread of the virus—the share of these residents concerned that the state will not lift restrictions quickly enough decreased by 40% (7 percentage points).



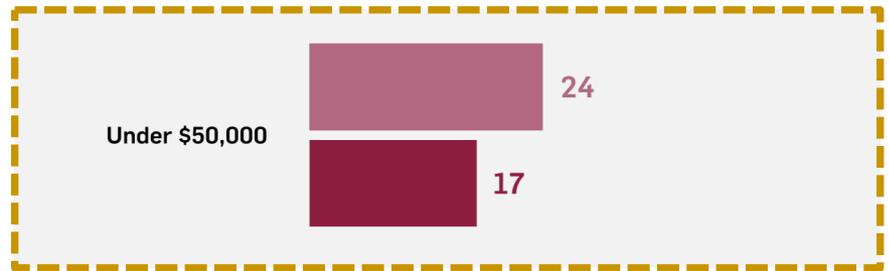
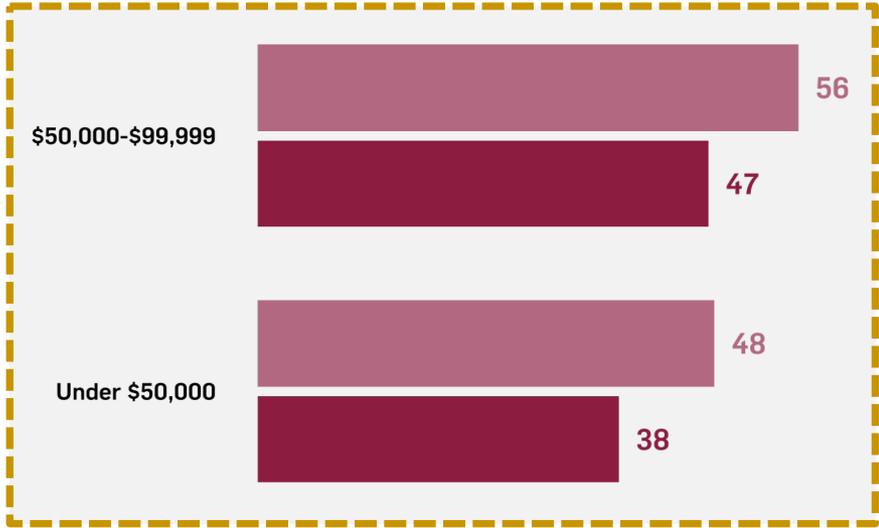
Which of the following would you say is more concerning to you, personally?

Impact on the economy:



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

Not lift restrictions quickly enough:



CONSUMER BEHAVIORS

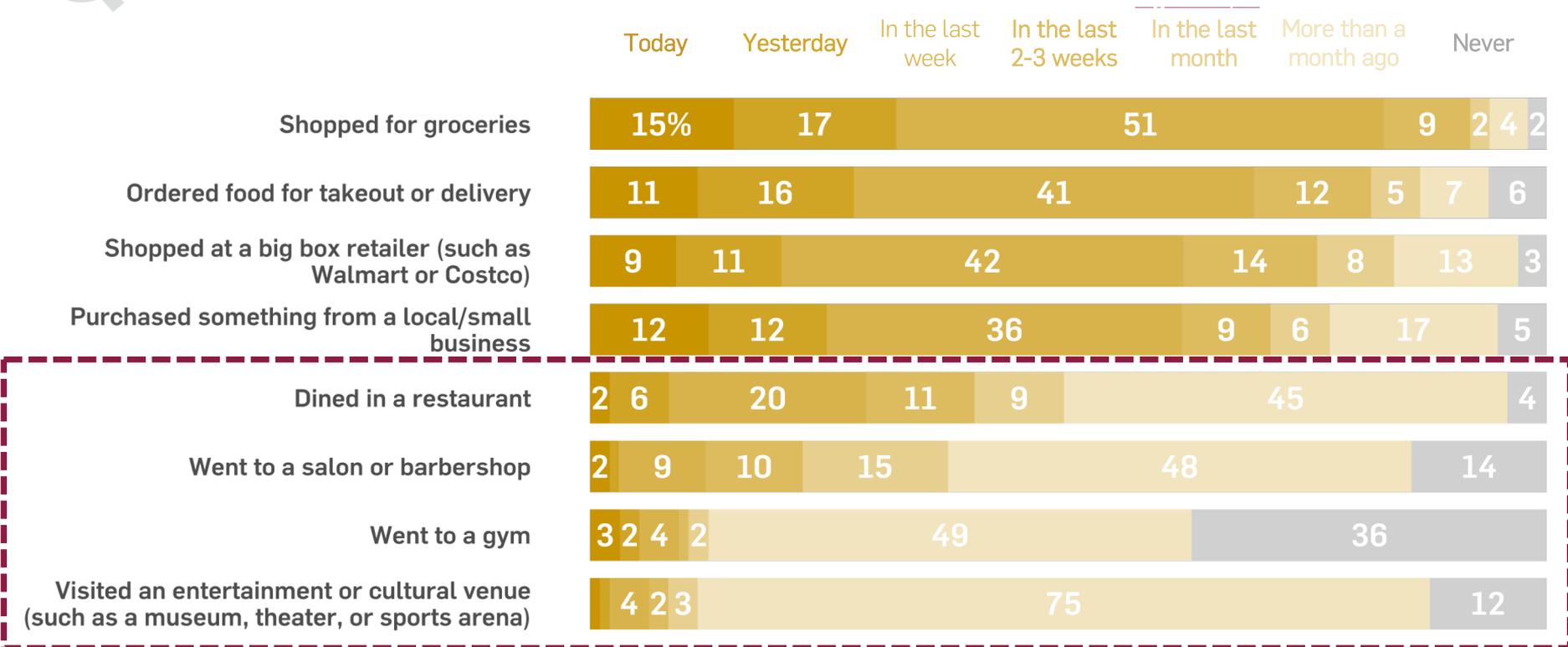
ENAGING IN THE ECONOMY & DESIRABLE PRECAUTIONS

INCREASED LEISURE ACTIVITY AS BUSINESSES REOPEN

As restrictions have been reduced since the last wave, economic activity of all kinds has increased. The most marked increase in activity from the last wave is for leisure activities, such as dining in restaurants and going to salons, likely because these types of venues are only recently reopened since last wave.



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

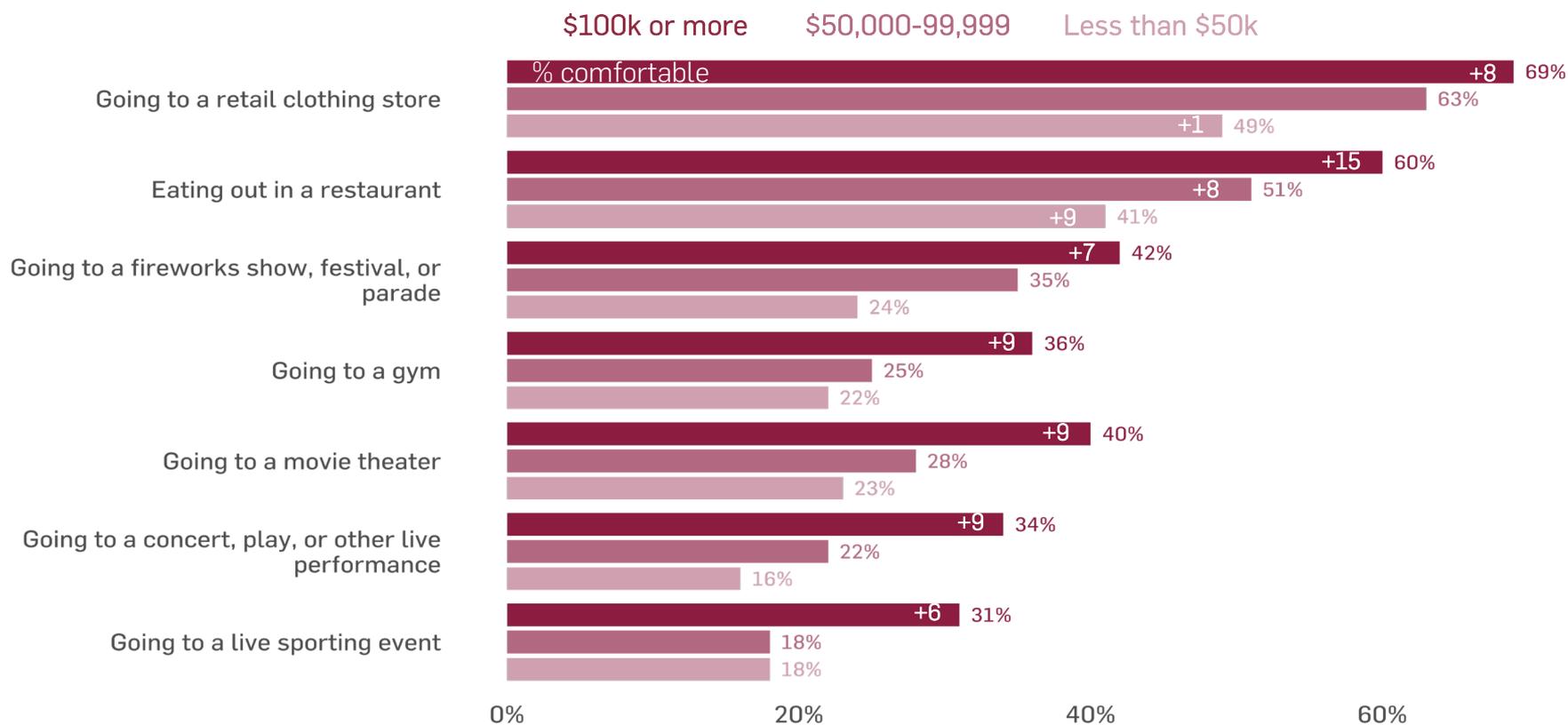


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HIGH INCOME RESIDENTS MORE COMFORTABLE

Since May, willingness or comfort participating in most activities has increased for respondents generally, but especially for higher income residents. Consistent with the last wave, higher income residents are more comfortable participating in commercial activities than lower income residents.

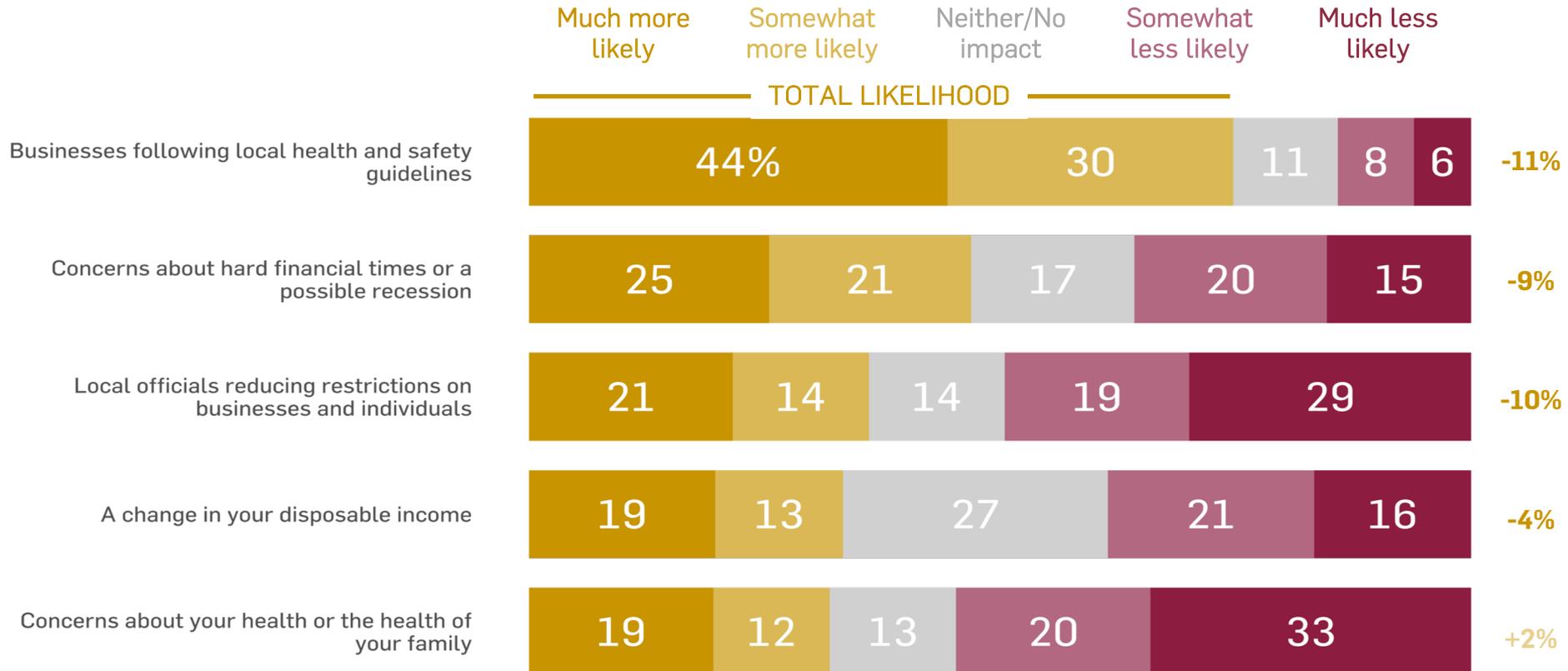
Q *Regardless of current restrictions in your area, would you feel comfortable or uncomfortable [ITEM] at this time?*



IMPACT OF CONSUMER CONSIDERATIONS DECLINES

Consistent with last wave, following local health and safety guidelines remains the best way to increase consumer confidence or willingness to engage with local businesses. However, the proportion of residents who say that any of these considerations would increase their likelihood to engage has decreased since last wave.

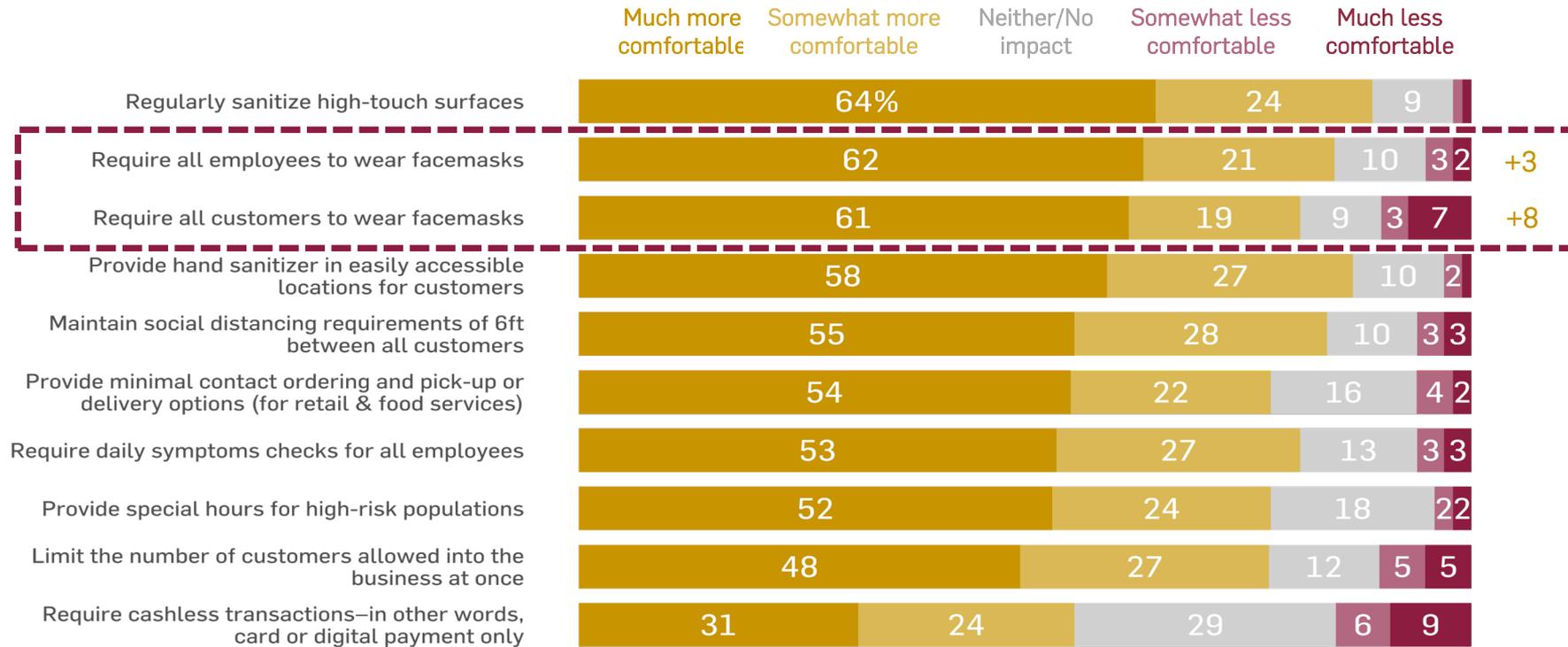
Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



COMFORT WITH MASKS INCREASES IN WAKE OF COUNTYWIDE MANDATE

Consistent with May findings, regularly sanitizing high-touch surfaces is the number one way to help consumers feel more comfortable visiting local businesses. Notably, facemask requirements (for both employees and customers) rank close behind, with a higher percentage of respondents saying such requirements would make them more comfortable compared to last wave. No other health and safety measures received notable increases or declines in appeal.

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



When the July survey began fielding (7/5-9), the SLCo countywide mask mandate had been in effect for nine days (Public Health Order released June 26, 2020).



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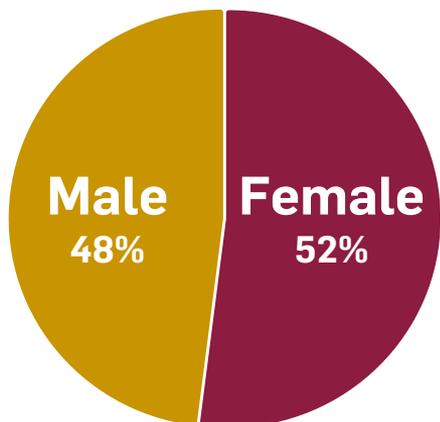
APPENDIX

FULL RESULTS & SUPPLEMENTAL ANALYSIS

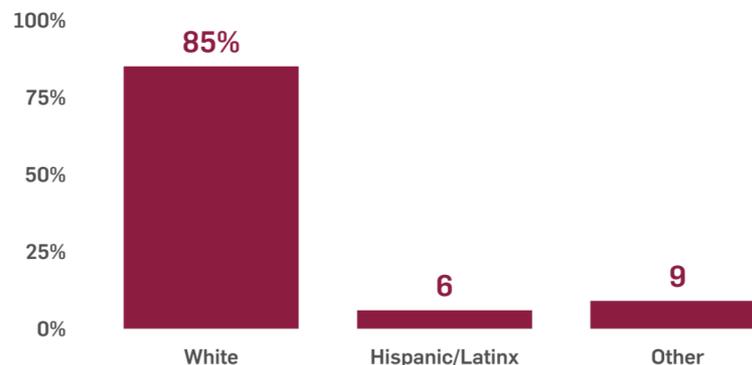
DEMOGRAPHICS

Respondent demographic composition data have been weighted to reflect ACS Census Estimates. The split between male and female respondents is essentially even. 85% of respondents indicate that they are white, approximating the Salt Lake County census population estimates. Approximately two-thirds of respondents are married, and the majority (57%) have no children.

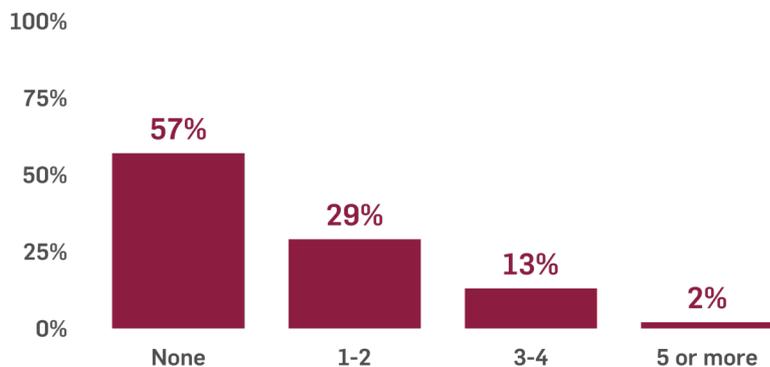
Gender



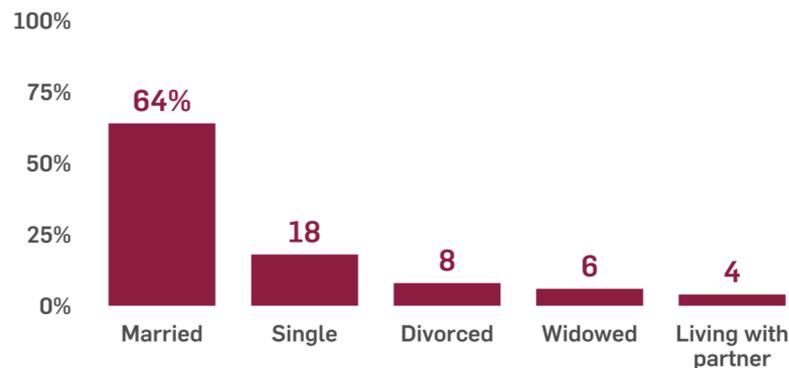
Race



Children



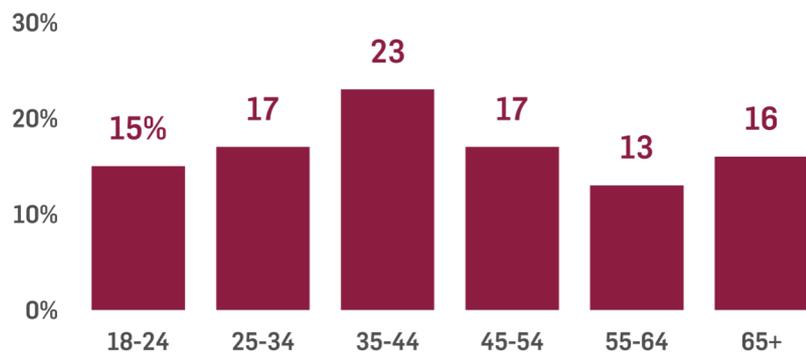
Marital Status



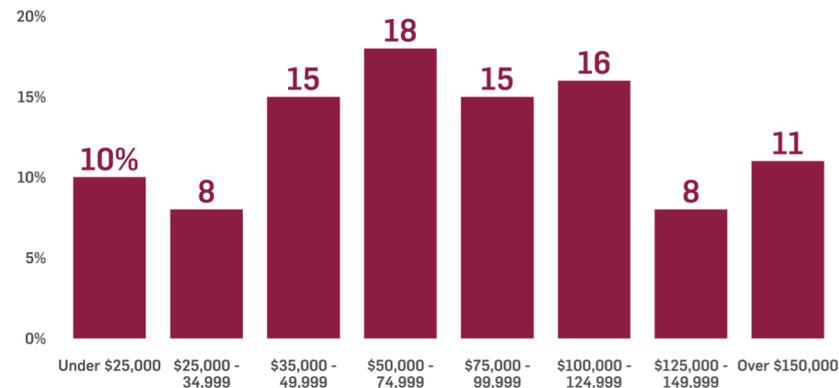
DEMOGRAPHICS

Respondents are distributed fairly evenly across age groups, with an average age of 42. Nearly two-in-five respondents have a college degree or higher education. About one-in-three respondents have a salary higher than \$100,000.

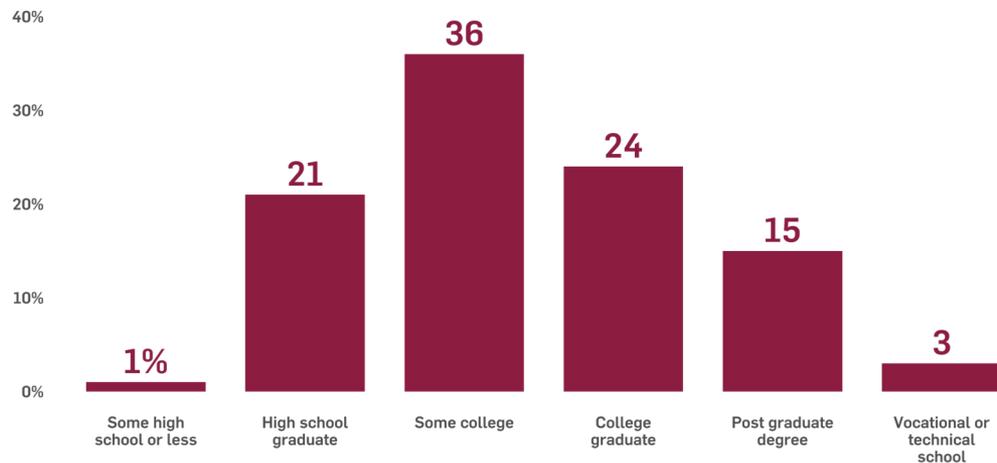
Age



Income



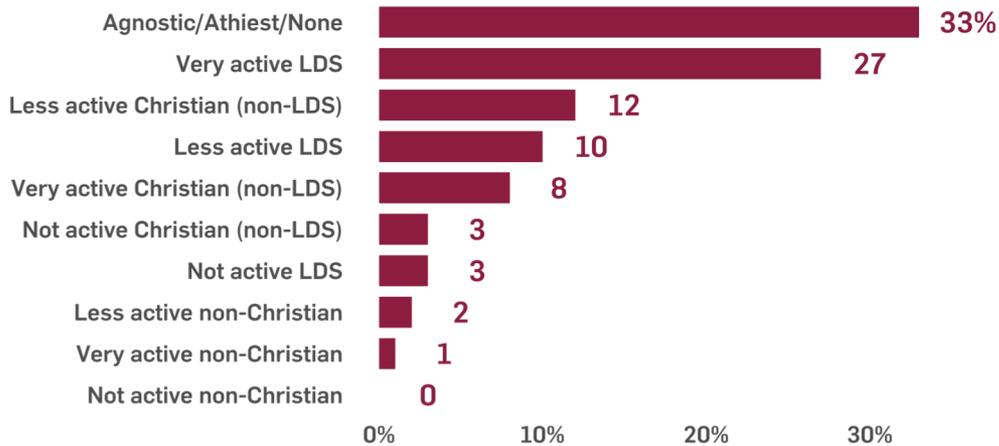
Education



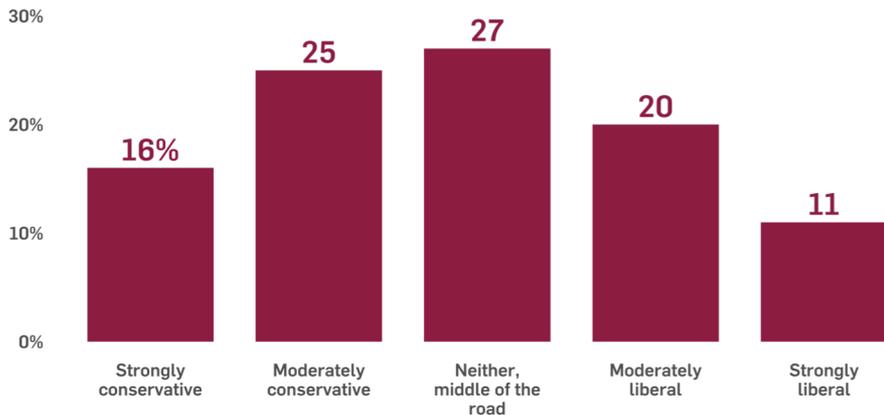
DEMOGRAPHICS

About half of residents surveyed are Latter-day Saints. In terms of party affiliation, 46% are Republicans and 42% are democrats.

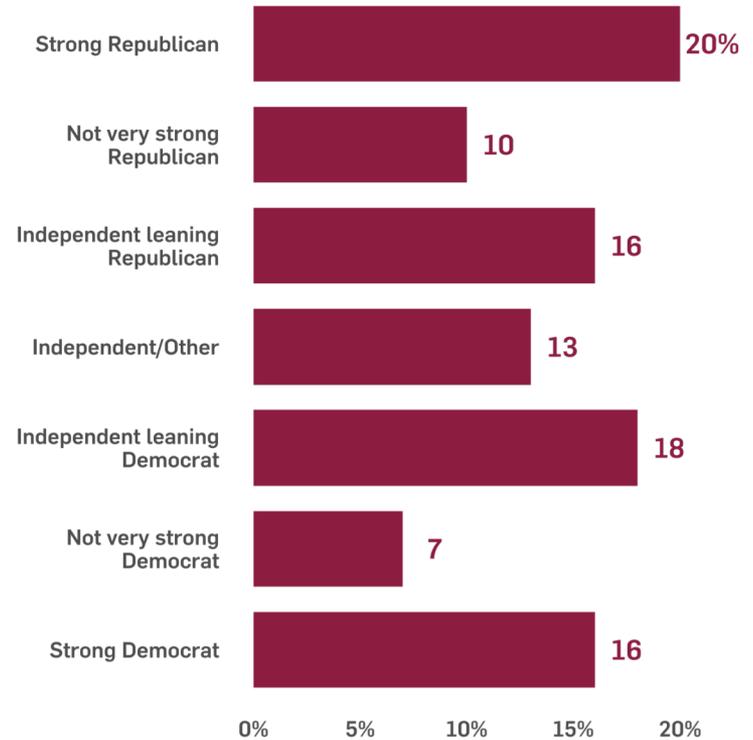
Religion



Ideology



Party



COVID-19 IMPACT

AWARENESS, PREVELANCE, & ANTICIPATED EFFECTS

COVID IMPACTS ON MENTAL HEALTH AND SOCIAL LIFE ESPECIALLY STARK

While most county residents report that their physical health has been largely unaffected by the outbreak, 59% of respondents feel as though their mental health has been negatively impacted, up 6 points since the survey was fielded in May. Social life is the area most negatively impacted by the coronavirus, with 80% of residents reporting a negative impact.



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

Positive impact

No impact

Negative impact

May
NET

July
NET

Physical health



-20%

-17%

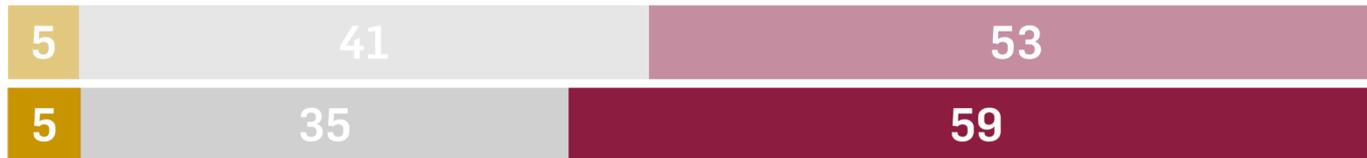
Financial well-being



-33%

-32%

Mental health



-48%

-54%

Social life



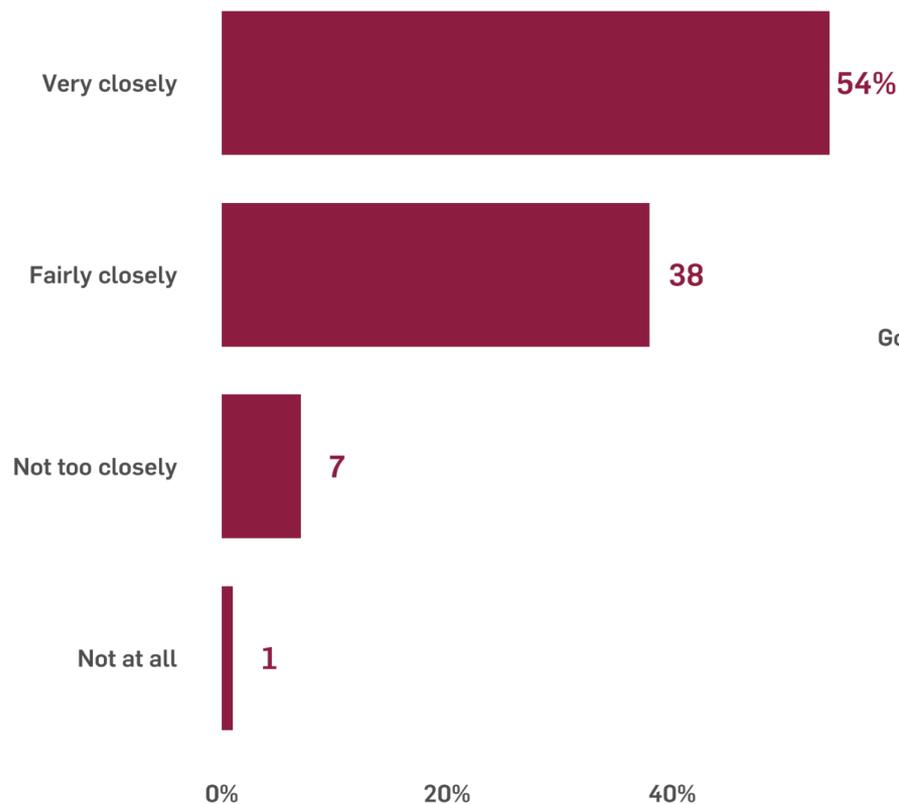
-78%

-74%

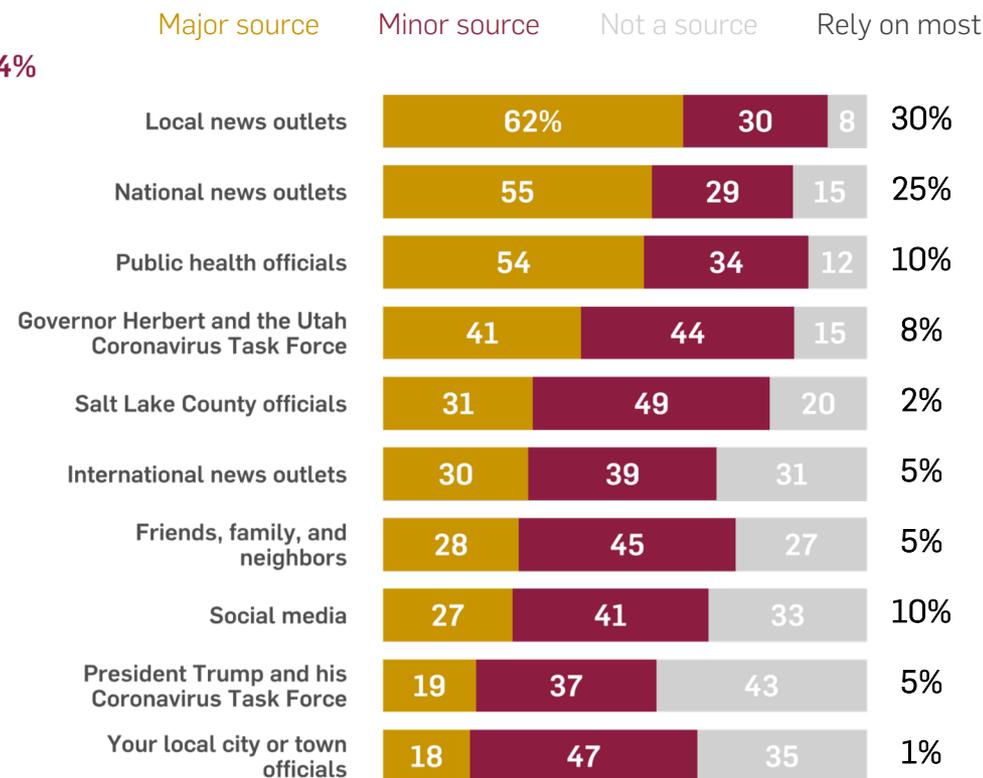
MAJORITY CLOSELY FOLLOWING COVID

92% of respondents are following the outbreak at least fairly closely, with most obtaining their news from local and national news outlets, including public health officials. Local officials are the least commonly used news source.

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



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

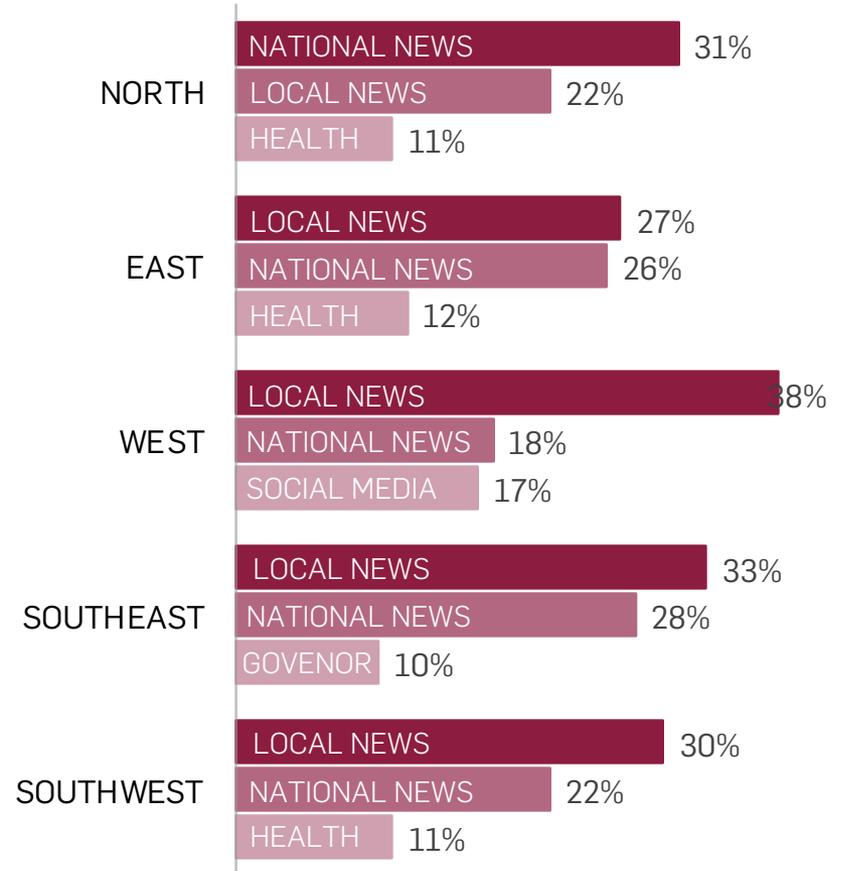
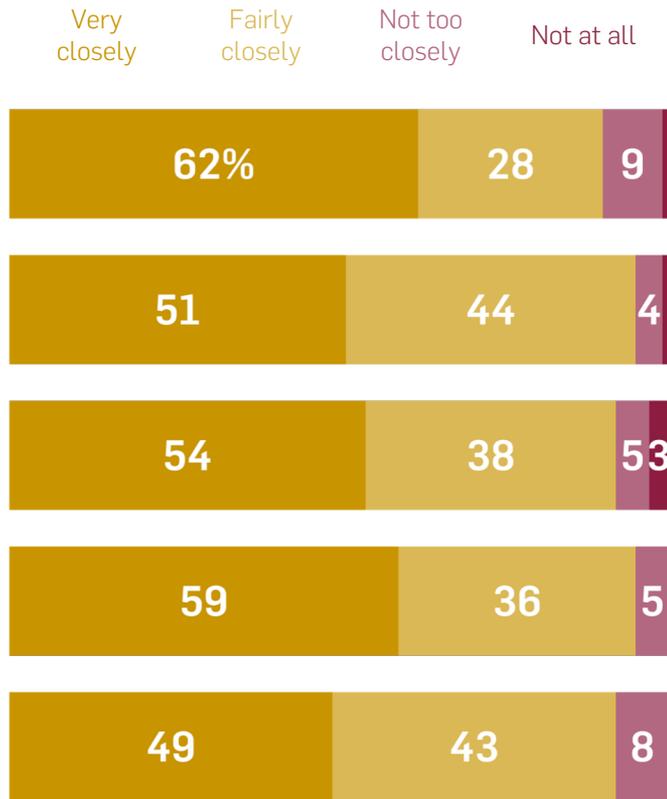


EFFECTIVE INFORMATION CHANNELS VARY

Respondents in different parts of the county are not only paying varying levels of attention to the news about the outbreak, but they are relying on different news sources and information channels.

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

Q And which of these sources do you RELY ON MOST for news about the coronavirus outbreak? - **TOP THREE SOURCES BY PLANNING AREA**



WEST INCREASINGLY HEALTH CONCERNED

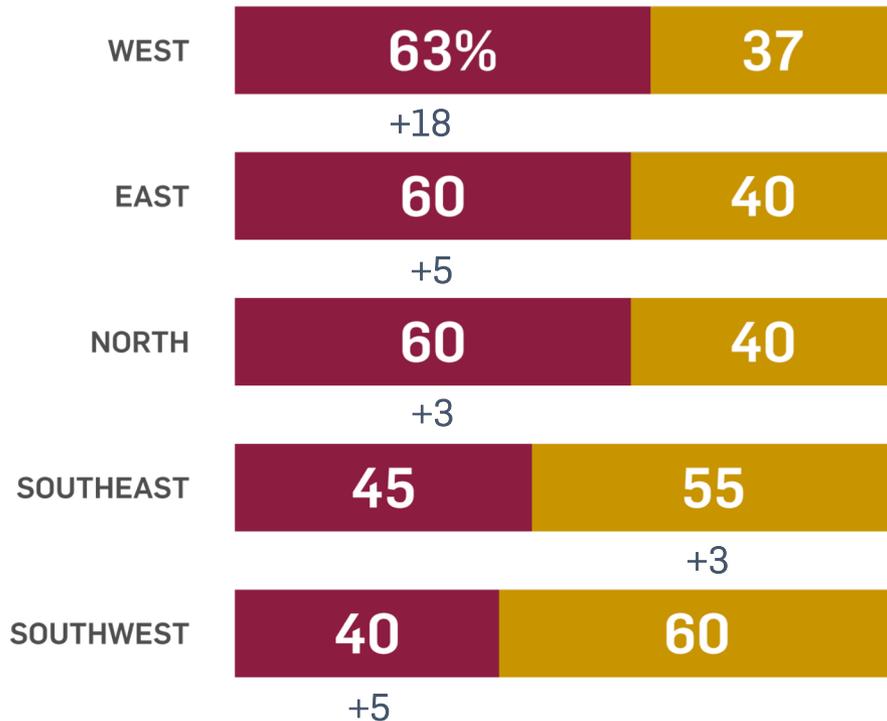
Since last wave, the West area has become increasingly concerned about the impact of the coronavirus on public health, with an 18-percentage-point increase in residents who prioritize health over economic impacts. The North and East follow closely behind as the most health concerned areas and all three areas are the most hesitant for officials to lift restrictions too quickly.



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

The impacts of the coronavirus on public health

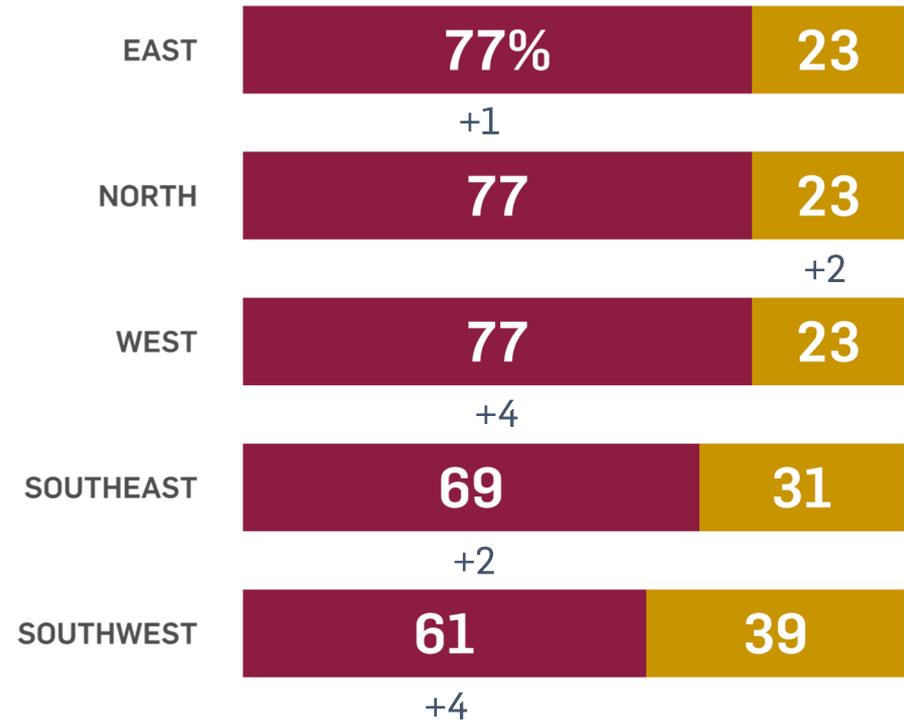
The impacts of the coronavirus on the economy



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

Lift restrictions too quickly

Not lift restrictions quickly enough



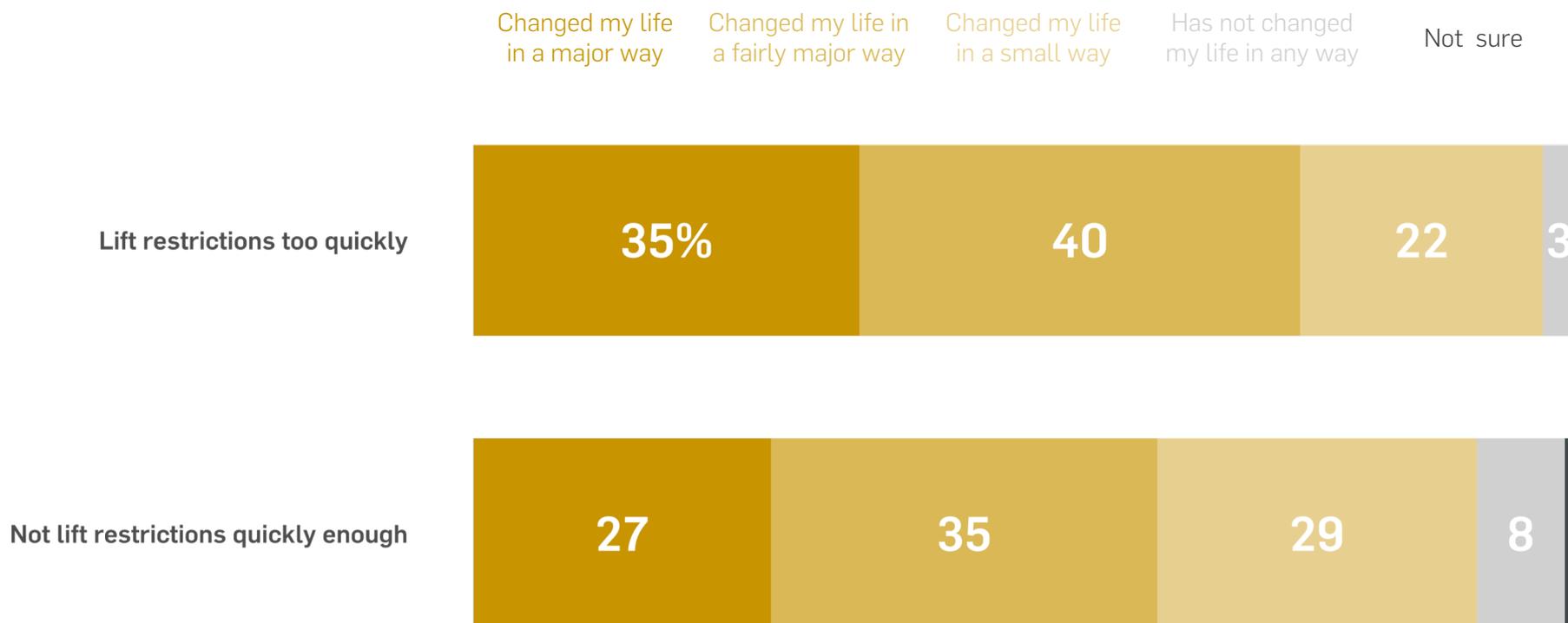
MOST IMPACTED ARE MOST HESITANT

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



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

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



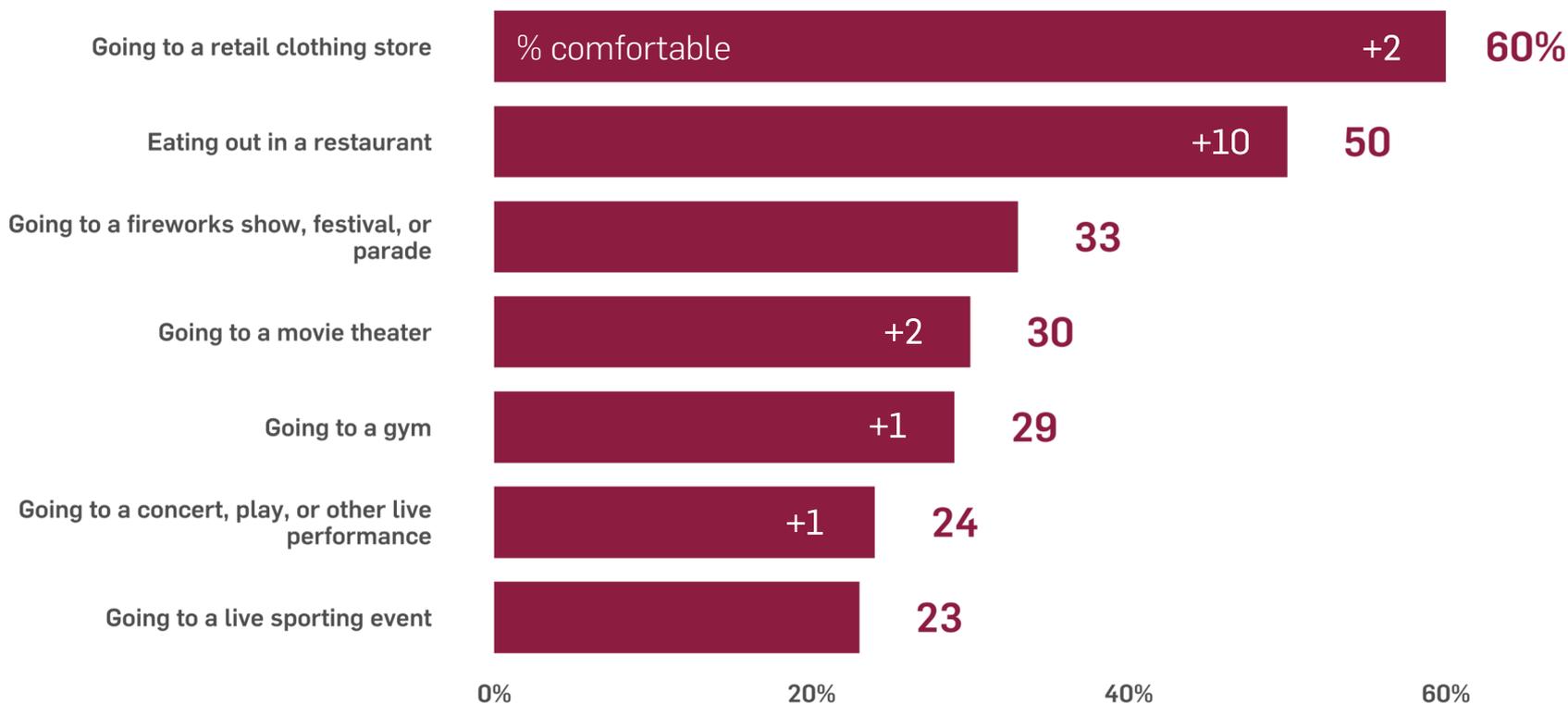
CONSUMER BEHAVIORS

SHOPPING, DINING, AND COMMERCIAL ACTIVITIES

RESIDENTS MORE COMFORTABLE EATING OUT

The majority of respondents (60%) say they would feel comfortable going to a retail clothing store. By comparison, less than a quarter of respondents would feel comfortable attending a live performance or sporting event. Since last wave, the percentage of residents who say they would feel comfortable eating out in a restaurant has increased by 10 percentage points.

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

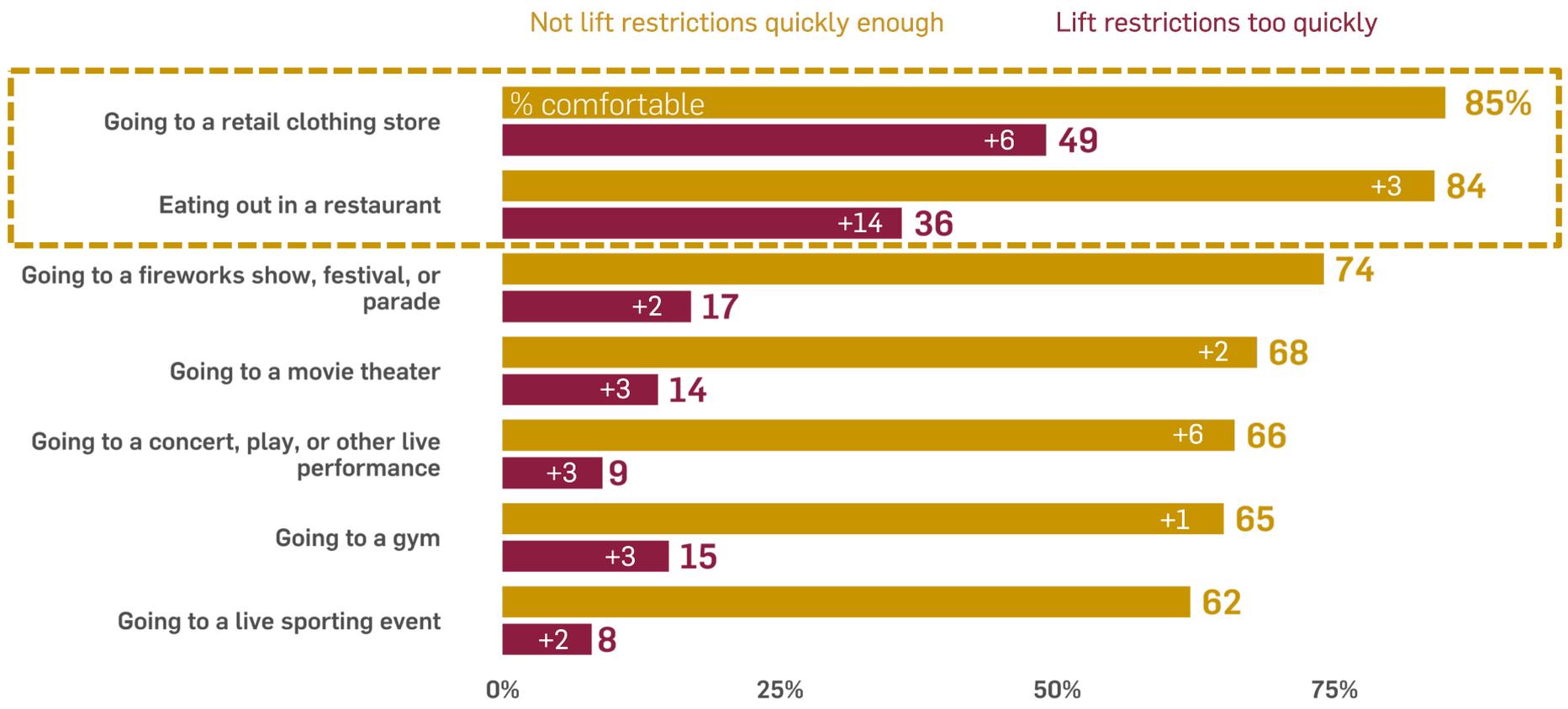


THOSE HESITANT TO LIFT RESTRICTIONS BECOMING INCREASINGLY READY TO SHOP AND EAT OUT

Those concerned that the restrictions will not be lifted quickly enough are significantly more comfortable with shopping and going to public events than are those who worry that restrictions will be lifted too quickly. However, among those hesitant to lift restrictions, the percentage who are comfortable eating out and visiting retail stores has increased since last wave.



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

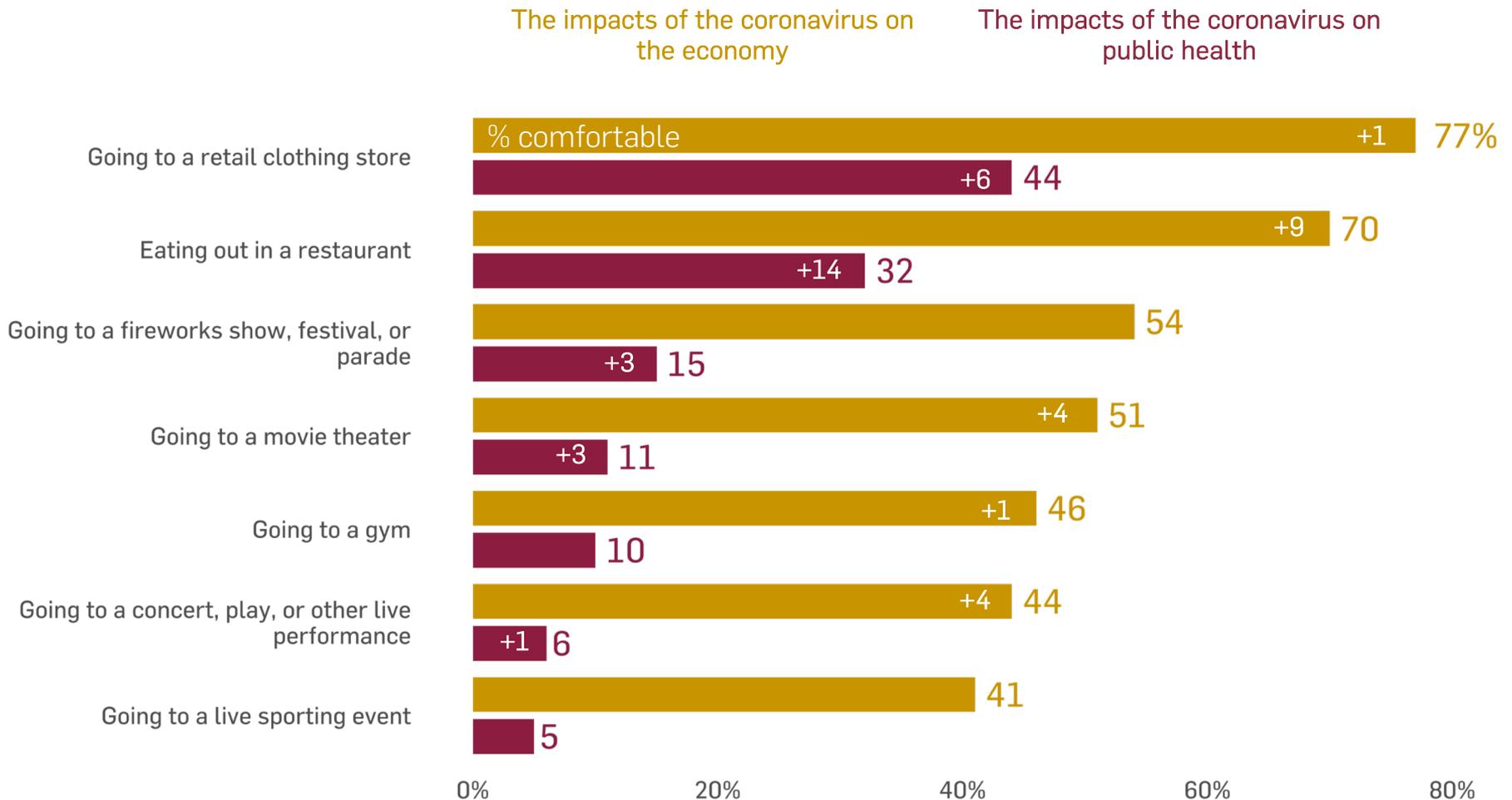


COMFORT LEVELS MOSTLY THE SAME

Since last wave, the contours of comfort levels among residents have remained mostly the same, with those more economically concerned more comfortable participating in most activities. Notably, reported willingness to dine in at a restaurant has significantly increased for both sub-groups.



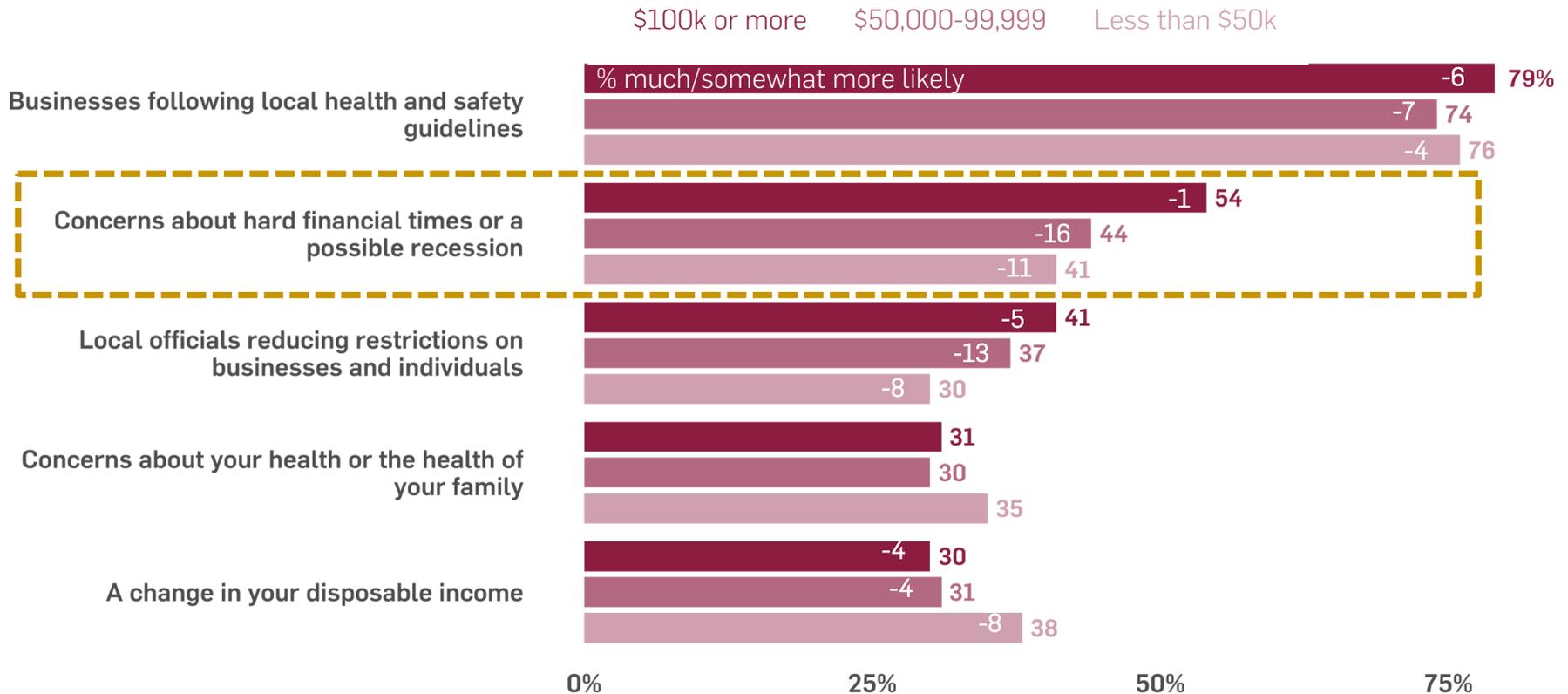
Regardless of current restrictions in your area, would you feel comfortable or uncomfortable [ITEM] at this time?



LOWER INCOME GROUPS LESS MOTIVATED BY CONCERNS ABOUT A RECESSION

Ensuring that businesses are following health and safety guidelines makes individuals of all income levels more likely to visit a local business. Compared to high income residents, lower-income residents are significantly less likely to be motivated to visit businesses due to concerns about a possible recession and have become increasingly less likely since last wave.

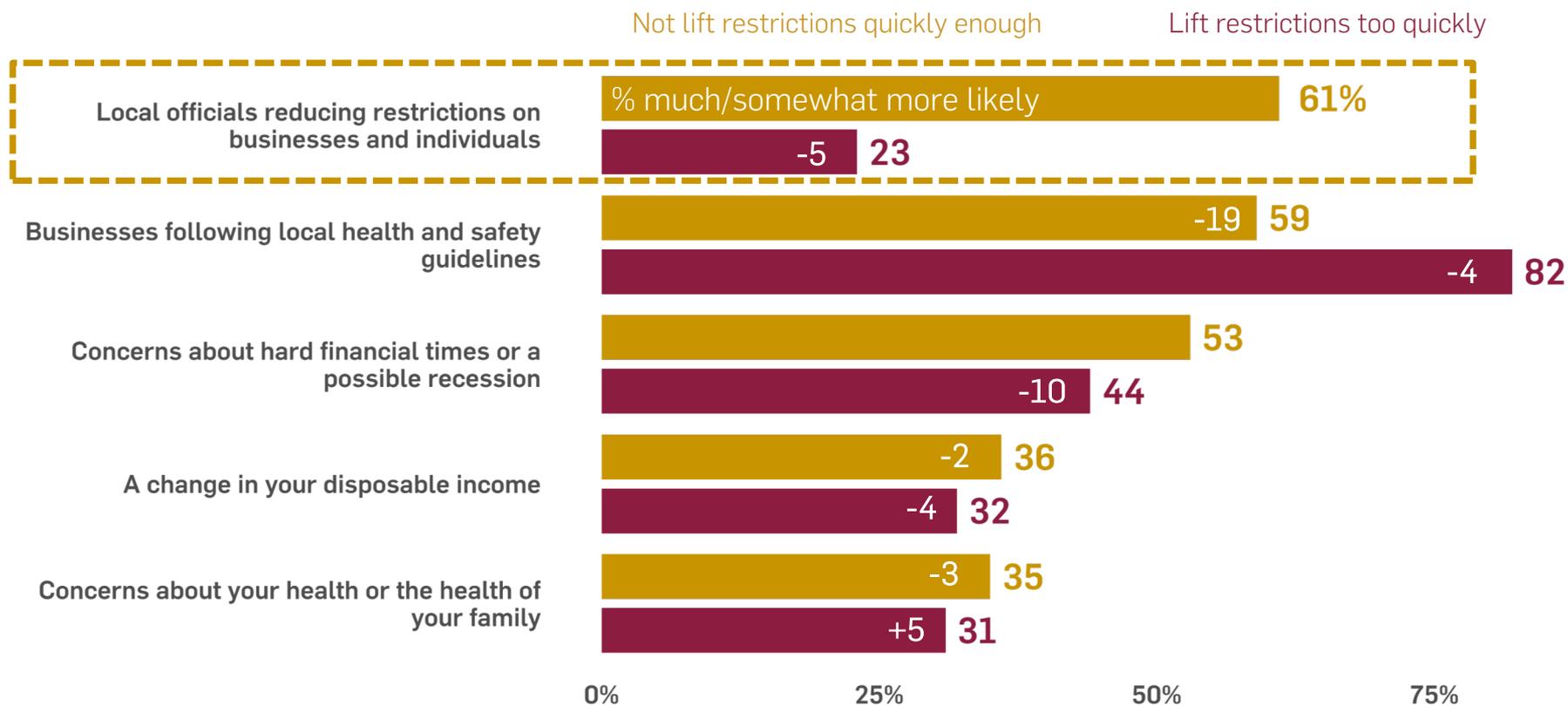
Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



RESIDENTS DIVIDED OVER RESTRICTION REDUCTIONS AND SAFETY GUIDELINES

While 61% of those concerned that restrictions won't be lifted soon enough say they would be more likely to shop if local officials reduced restrictions, only 23% of those hesitant to lift restrictions say the same. Among those anxious to lift restrictions, the percentage willing to visit businesses following safety guidelines has significantly decreased since last wave.

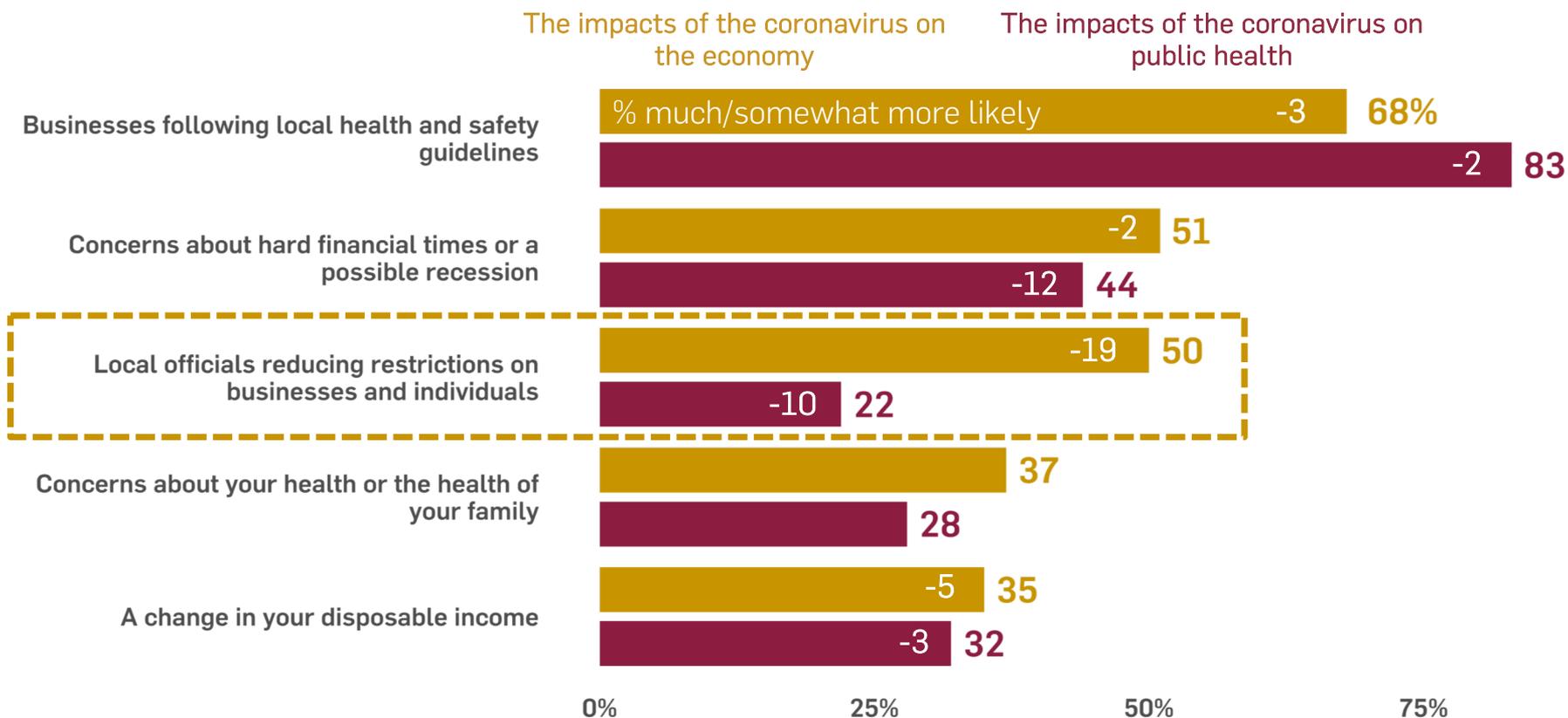
Q *Thinking about the different types of local businesses in your community—like retail and grocery stores, restaurants, fitness centers, entertainment venues, salons, and others—would [ITEM] make you more or less likely to visit local businesses?*



ECONOMICALLY AWARE & HEALTH CONCERNED NOW LESS TRUSTING OF LOCAL GUIDELINES

Residents more concerned with the impact of COVID-19 on the economy than on public health are far more likely to visit businesses when local officials lift restrictions than are those concerned about public health. However, in both groups, the proportion of those motivated by local restriction reductions has significantly decreased since last wave.

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

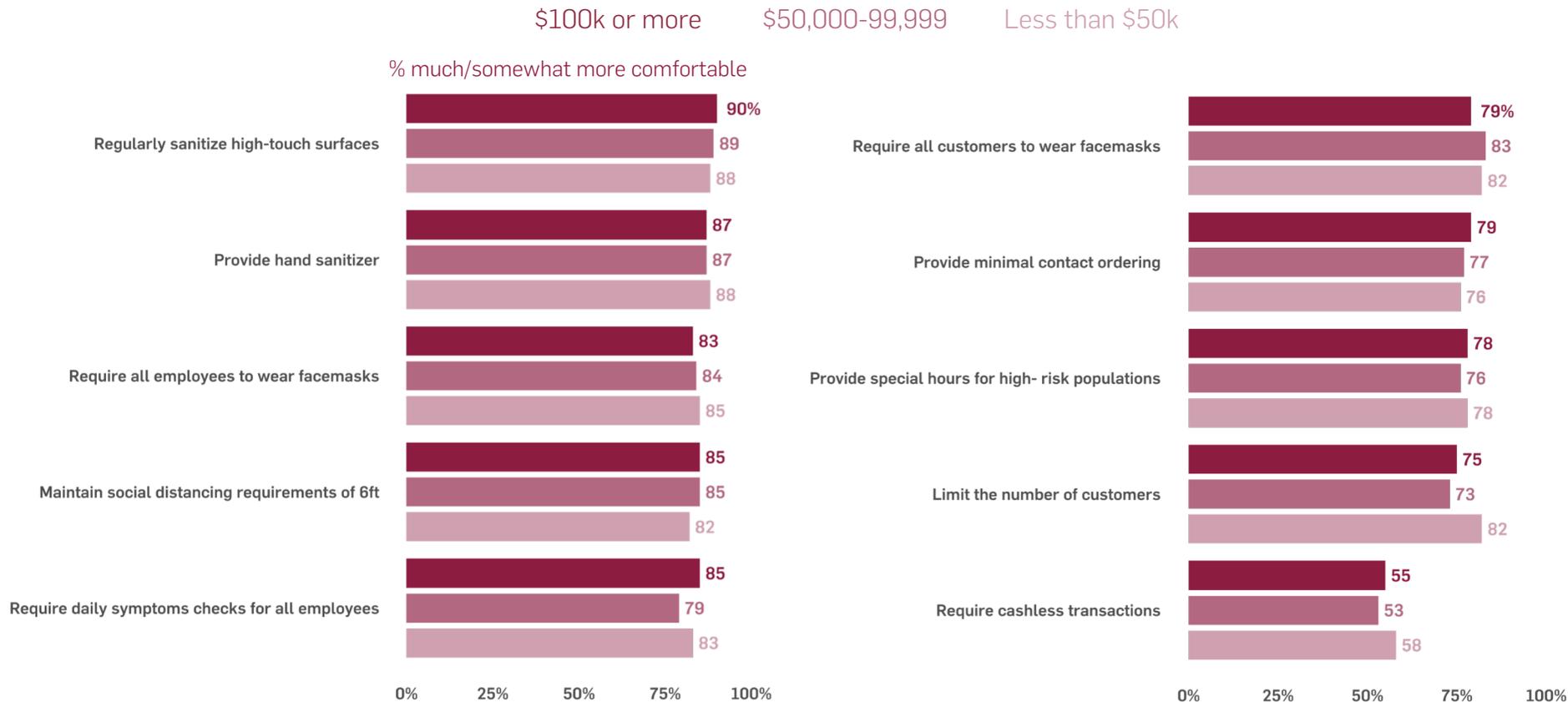


EFFECTIVE MEASURES DO NOT VARY BY INCOME

Across all income levels, county residents respond similarly to potential safety measures. There are no significant differences in anticipated effectiveness or increased comfort across income levels. The only exception to this is limiting the number of customers in stores, to which low income residents are slightly more receptive.



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

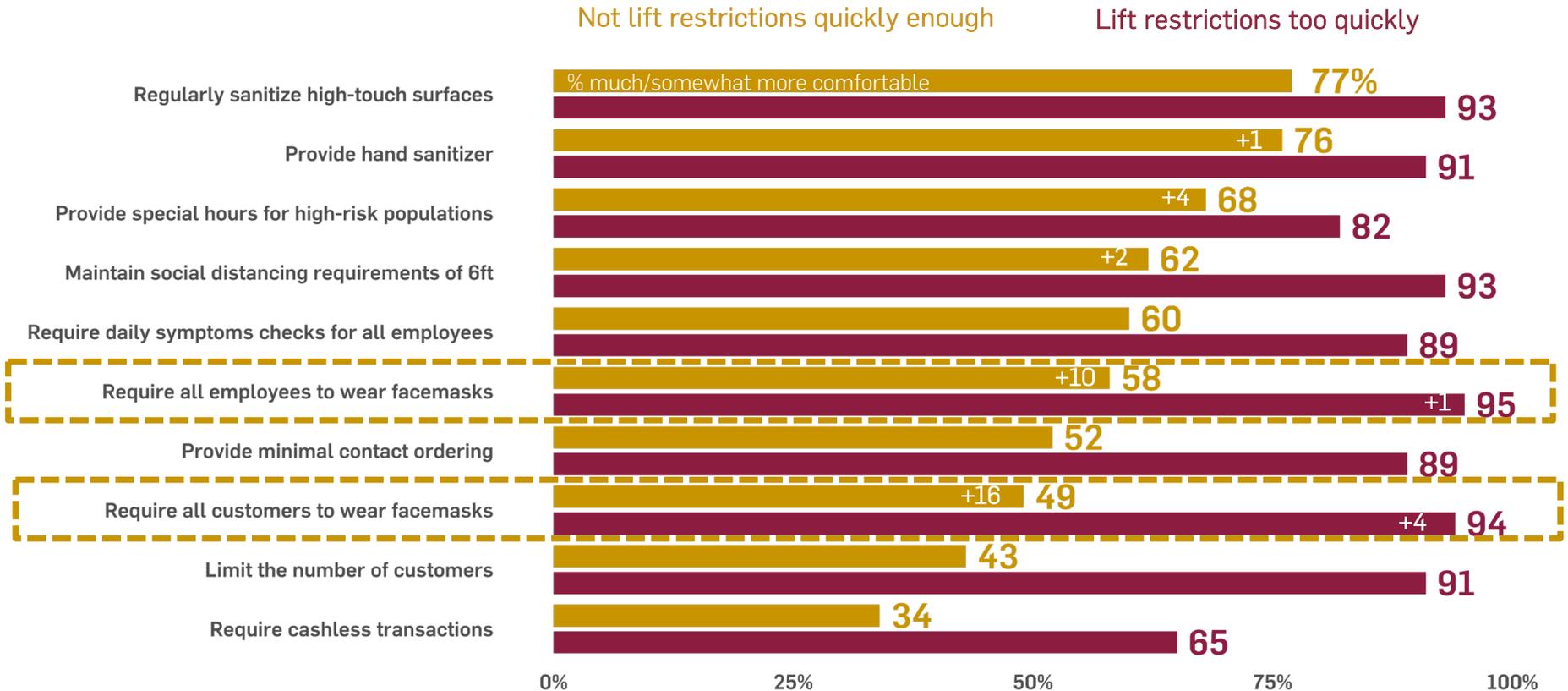


INCREASING SUPPORT FOR FACEMASKS AMONG THOSE SEEKING TO LIFT RESTRICTIONS

Although those who are concerned that restrictions won't be lifted quickly enough are generally less enthusiastic about safety measures than other residents, the percentage who say they would feel more comfortable visiting businesses that require facemasks (for both employees and customers) has increased considerably since last wave.



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

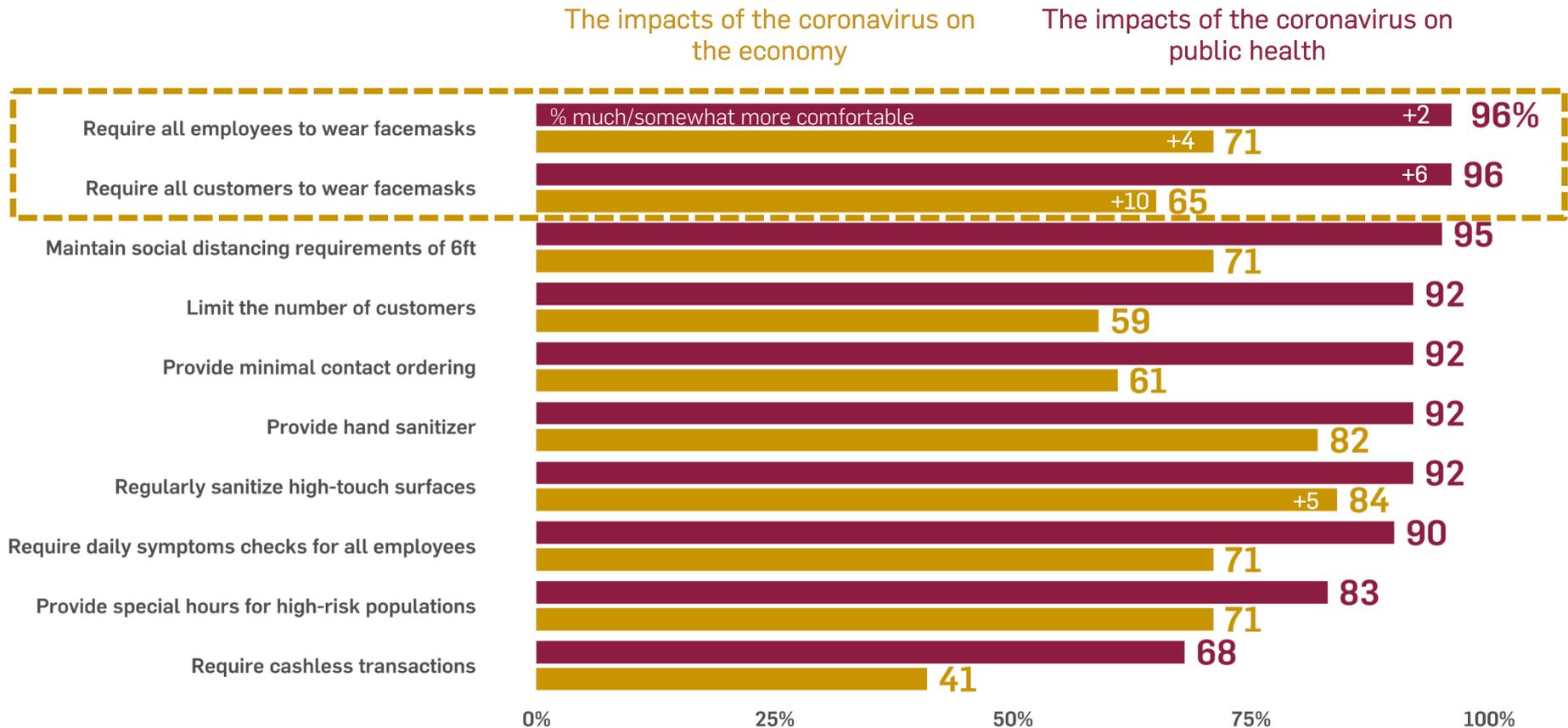


INCREASING SUPPORT FOR FACEMASKS AMONG BOTH HEALTH AND ECONOMICALLY CONCERNED

In general, those concerned with the effect that the coronavirus will have on public health are more comfortable with health and safety measures than those who are concerned with the effect on the economy. However, both groups are more supportive of facemask requirements now than were back in May.



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



PLANNING AREA PROFILES

DIFFERENTIATING ATTITUDES & CHARACTERISTICS

COVID-19 IMPACT

OVERAL IMPACT

- In the West, the percentage of residents who say the coronavirus has impacted their day-to-day life in a very major way has increased significantly since last wave (+12 points, 24% to 36%)

MENTAL AND EMOTIONAL HEALTH

- Across all regions, the percent of residents who say their mental health has been adversely affected by the coronavirus has increased since last wave. The area with the biggest change since last wave is the Southeast (+12 points, 47% to 59%)
- The percentage of residents in the Southeast who say that the coronavirus has negatively impacted their social life has decreased since last wave (-15 points, 84% to 69%) while the percentage of people in the West whose social lives have been negatively impacted has increased (+8 points, 72% to 80%)

PHYSICAL AND FINANCIAL

- The percentage of residents in the North who say they their financial well-being has been adversely affected has increased since last wave (+8 points, 40% to 48%). Compared to other areas, the North is area with the highest proportion of residents who have been negatively impacted financially.
- The percentage of residents in North and West who say they have been negatively impacted in terms of physical health has decreased since last wave (-10 points in North and -9 points in West)

COVID-19 ATTITUDES AND PERCEPTIONS

NEWS

- In all areas except the East, the proportion of residents in who say they are following news about the coronavirus very closely has increased since the last wave. The West is the area that has increased close following the most (+9 points, from 45% to 54%)
- In the East, the percentage of residents of relying on National News outlets as their main source for coronavirus updates has significantly decreased (-22 points, 48% to 26%) and the percent relying on local news outlets has increased (+12 points)
- Across all planning areas, the percentage of residents relying most on local news outlets for updates about the coronavirus has increased, but has increased most in the Southeast (+13 points, 20% to 33%)
- Residents in the West have become more reliant on social media as the main source for their news since last wave (+12 points, 5% to 12%)

PERCEPTIONS

- For every area except for the Southeast, the percentage of respondents who say they are more concerned about the impacts of the coronavirus on public health has increased since last wave. The West is the area with the biggest shift (+18 percentage points from 45% to 63%)

COVID-19 CONSUMER BEHAVIOR

COMFORT

- In the North, the percentage of residents comfortable going to a retail clothing store has increased since last wave (+14 points, 43% to 57%). And in the Southeast, the percentage comfortable shopping for clothing has increased (+17 points, 54% to 71%)
- Across all regions, more residents are comfortable eating in restaurants than they were last wave. The North is the area with the largest change (+21 points from 29% to 50%) and the West is the area with the smallest change (+6 points)

LIKELIHOOD TO SHOP

- The percentage of residents in the North who say they they would be much more likely to shop at businesses following health and safety guidelines has increased since last wave (+9 points, from 43% to 52%). By contrast, the percentage of residents in the Southeast who say they would be much *less* likely to shop at businesses that follow safety guidelines has increased (+11 points from 2% to 13%)
- In the North and Southwest, the percentage of residents who say they would be much more likely to shop at local businesses if local officials reduced restrictions has increased (+9 in North, 11% to 20%; +8 in Southwest, 24% to 32%)
- The percentage of residents in the North who say they would be much more likely to shop due to changes to disposable income (+9 points), concerns to about health or health of family (+25), and concerns about a financial recession has increased since last wave (+7).