

Colorado Media Project Statewide Survey

2019 Survey of Arts Access and News Media



**COLORADO
MEDIA
PROJECT**

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Background and Overview

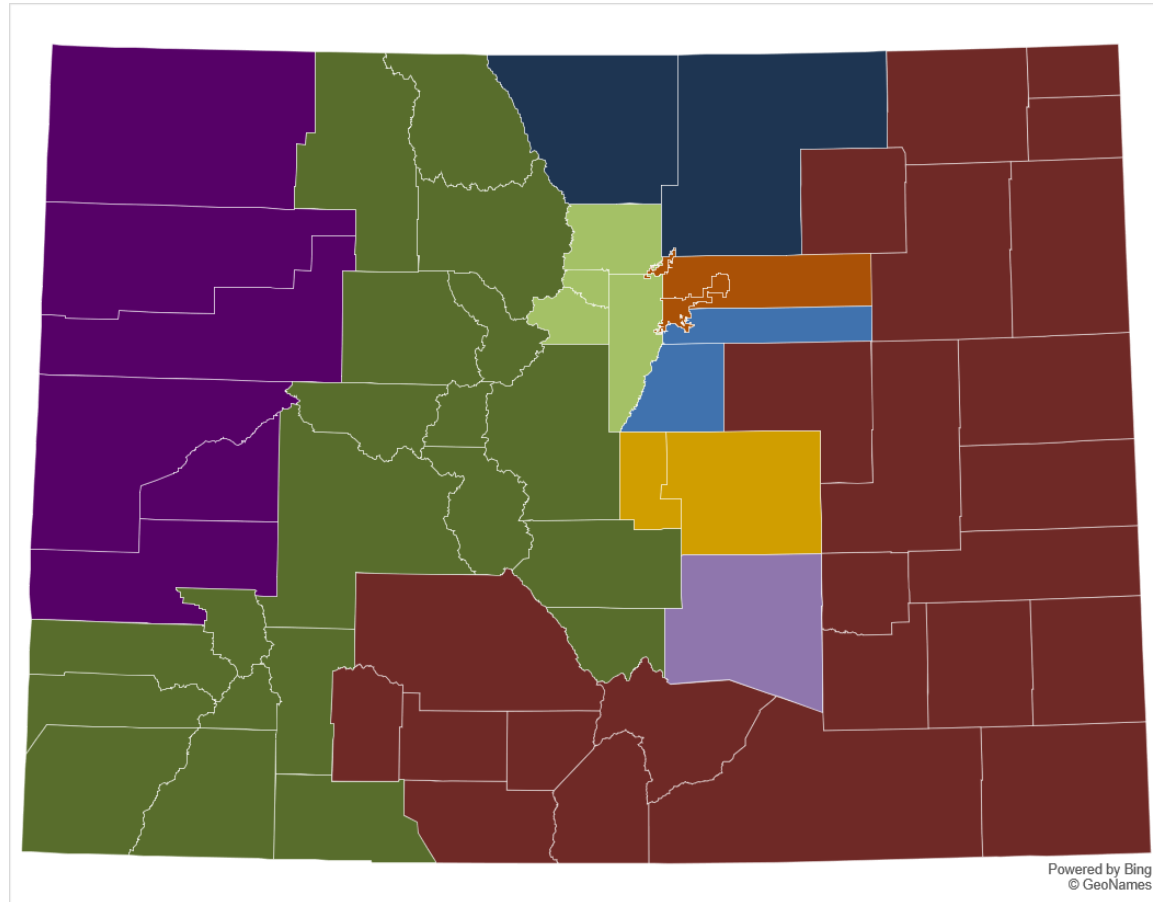
Survey overview

- ➔ In late July and early August of 2019, Corona Insights conducted a statewide online panel survey of Colorado residents on behalf of the Colorado Media Project. The study examined several areas of interest related to the intersection of news media and access to arts and culture.
- ➔ Major topics included:
 - > Participation and interest in arts and culture
 - > Means of getting information about arts and culture
 - > Current access to news media in general
 - > Funding options for news media
- ➔ The survey produced 2,039 usable responses, which allows for significant analyses of subpopulations.

Survey Geographies

➔ Results were developed for statewide attitudes, beliefs, and behaviors, and also for nine distinct regions of the state, shown at right.

- > 1=Southern Denver Metro
- > 2=Central/North Denver Metro
- > 3=West Denver Metro
- > 4=Colorado Springs Metro
- > 5=North Front Range
- > 6=Pueblo Metro
- > 7=Western Colorado
- > 8=Mountains
- > 9=Plains and Valleys

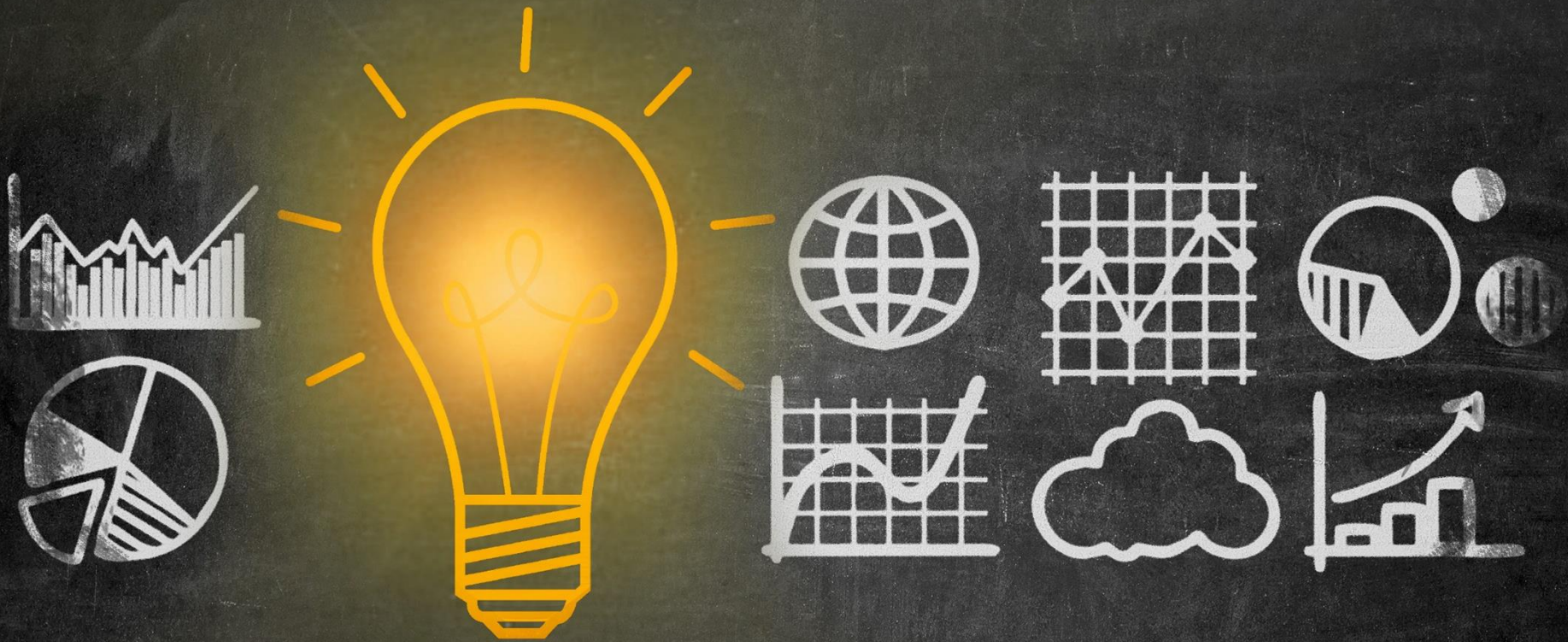


Region breakdown

Region	Counties
1	Arapahoe, Douglas
2	Adams, Broomfield, Denver
3	Boulder, Clear Creek, Gilpin, Jefferson
4	El Paso, Teller
5	Larimer, Weld
6	Pueblo
7	Delta, Garfield, Mesa, Moffat, Montrose, Rio Blanco
8	Archuleta, Chaffee, Custer, Dolores, Eagle, Fremont, Grand, Gunnison, Hinsdale, Jackson, La Plata, Lake, Montezuma, Ouray, Park, Pitkin, Routt, San Juan, San Miguel, Summit
9	Baca, Bent, Cheyenne, Conejos, Costilla, Crowley, Elbert, Huerfano, Kiowa, Kit Carson, Las Animas, Lincoln, Logan, Mineral, Morgan, Otero, Phillips, Prowers, Rio Grande, Saguache, Sedgwick, Washington, Yuma

Survey Design and Analysis Notes

- ➔ The survey was 15 minutes long and any Colorado resident age 18 and over was eligible to participate.
- ➔ The population was oversampled in rural areas of the state (within the panel population's limits) to gather regional data more efficiently. Responses were then statistically adjusted to improve accuracy on a statewide level by weighting ethnicity, age, and region to match statewide figures. This produced usable results on a regional level while also being accurate on a statewide level.
- ➔ An accompanying file to this report provides detailed breakouts of data by numerous characteristics, including:
 - Age
 - Denver Metro versus Non-Metro
 - Education level
 - Ethnicity
 - Level of trust in news
 - Political affiliation
 - Primary tool or method of getting news
 - Region of State



Executive Summary

Most of the state's population participates in some form of arts and culture...

- > 85 percent of Coloradans participated in at least one type of activity, and the average respondent participated in 2.6 types of activities over the past 12 months.

...but they're not yet satiated...

- > 92 percent said that if they could eliminate barriers to doing so, they would like to participate in more arts and culture than they do now.

...and they're willing to travel.

- > 48 percent have driven more than 50 miles to an event in the past 12 months.
- > Distance analysis indicates that the Denver Metro Area is a common destination.

Executive Summary

Facebook is a key source of information about arts and culture...

- > Facebook is the most commonly used media source of news about arts and culture, trailing only word of mouth as an overall source of information.

...but it's age-specific...

- > Facebook is the most commonly used news source among the 25-44 age group, and is a top-three source among those 55 and older. (News and Facebook are equally used in the 45-54 range.)
- > Instagram is roughly equal to Facebook for the 18-24 age group, but is not commonly used by those age 35 and older.
- > News coverage is the main source for those 55 and older

...and social media relies on the organization having a strong reach.

- > The most common source of social media information is organizations that are promoting themselves.

Executive Summary

People generally trust their local news sources...

- > 84 percent are “somewhat confident” or “very confident” that their local news media will give them full, fair, and accurate information.

...and arts and culture is a net positive influence on this trust...

- > Arts and culture topics enhance the trust reputation of news agencies.
 - 48 percent are “very confident” that they can get full, accurate, and fair reviews of arts and culture events
 - This is higher confidence than seen for news covering the topics of business, crime, economic, human interest, self-improvement, investigative journalism, politics, and reviews of national cultural phenomena.
 - 62 percent are “very confident” that they can get full, accurate, and fair information about upcoming arts calendar events.
 - The public has more confidence in this type of news than they do about all of the above topics, plus news covering daily life info (e.g., road closures, etc.), sports, and weather.

Executive Summary

The organizations with a statewide reach are best known around the state...

- > Television stations that have large market areas tend to be the most well known (9News, CBS Denver, Denver7, Rocky Mountain PBS, all with awareness in the 50 to 70 percent range), topped only by the state's largest newspaper (Denver Post at 72 percent).

...while niched news sources do well in their niches but still trail the biggest outlets even in those niches.

- > Media outlets that target particular demographic niches tend to have much higher awareness in those niches than in the general population. However, those organizations still have lower awareness within their niches than the largest players do statewide, which shows that sheer scale of operations is the biggest driver of awareness.

Executive Summary

Phones are the main tool for getting news.

- > Phones are the most commonly used tool to get news and community information, and along with television is the most widely used tool. (63 percent use television and phones to regularly get news, while 36 percent say that the phone is their most commonly used tool, more than any other method.

...but these preferences also vary by age.

- > Phones are the most commonly used tool for those under 45, while television is the most commonly used tool among those 45 and older.

Executive Summary

A majority of respondents say that they do not financially support news organizations.

- > 36 percent say that they have participated in some sort of fundraising effort for a news organization in the past twelve months.
- > 30 percent say that they pay for a news subscription or membership.
 - The definition of what a news organization is may be fuzzy, as 45 percent later selected news organizations from a list to note that they pay for a membership or subscription.
- > Rates of support are slightly higher among minorities, younger people, and Democrats. Support is lower among people who rely most on television to get their news.

Executive Summary

Respondents were generally neutral or positive about the prospect of bundling news funding with arts and culture memberships.

- > Among those with current memberships, 84 percent said that this type of bundling would have no impact or even have a positive impact on their decision to renew their membership.
 - The goal with this group would be assuage the concerns of the 15 percent of respondents who say that it would make them less likely to renew.
- > Among those who are not currently members of an arts or culture organization, 32 percent said that this type of bundling would have a positive impact on their decision to become a member.
 - The remainder are neutral or negative, which is not a concern since they're not currently spending money in this area anyway.
- > As a population, the non-member market is 6.1 times larger than the current member market.

Executive Summary

Public funding of news outlets neutral as a general concept, but support rises for more specific propositions, and particularly so for delivery through libraries.

	Support	Oppose	Neutral
Public funding (general concept)	24%	26%	51%
Tax-Incentive funding	30%	17%	53%
Grant funding	35%	14%	51%
Public funding for libraries to provide news	41%	11%	48%

However, a large part of the population is currently neutral on the topic, and their final decisions would impact any voting.

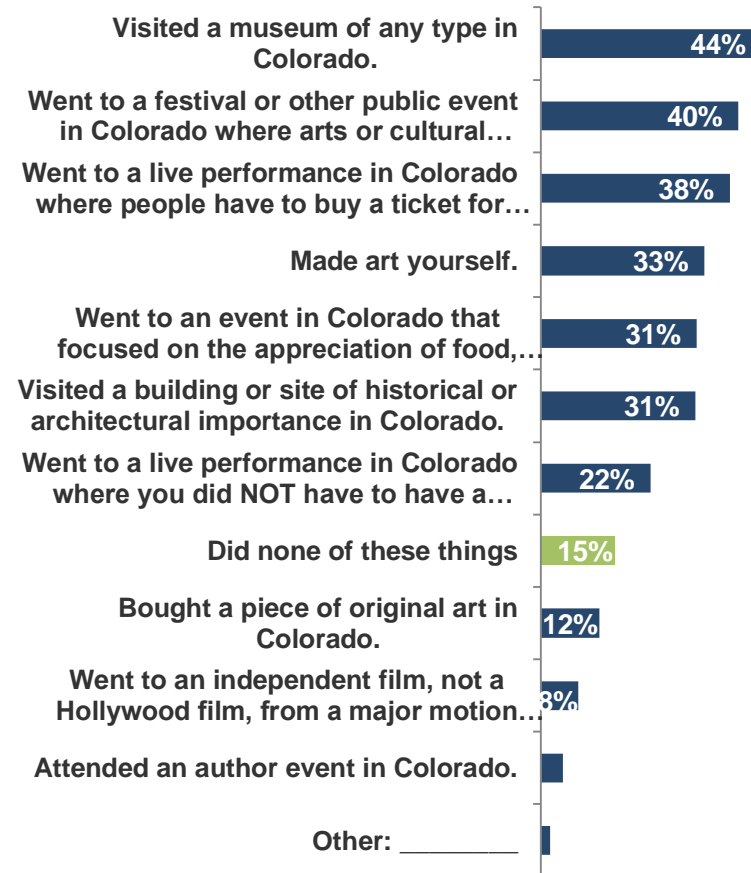


Detailed Findings

Arts and Culture Participation

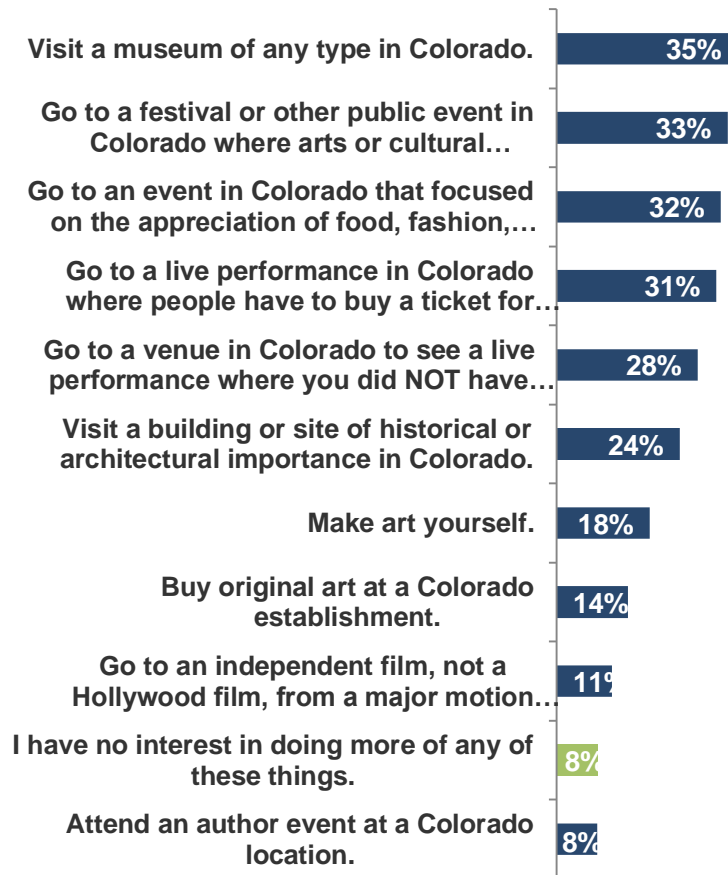
Most Coloradans engaged in multiple cultural experiences over the last year

- ➔ Most of the population participates in some form of arts and culture. 85 percent participated in at least one type of activity, and the average respondent participated in 2.6 types of activities.
- ➔ Museums, festivals, and paid live events are the most broadly attended arts and culture events with 38 to 44 percent of the population doing each of these things in the past 12 months. Attendance at museums remains strong through age, but attendance at festivals and live events drops significantly for the population age 65 and over.
- ➔ Visitation of paid live performances and museums is much higher among those with college degrees.



The vast majority of Coloradans wanted to have more cultural experiences

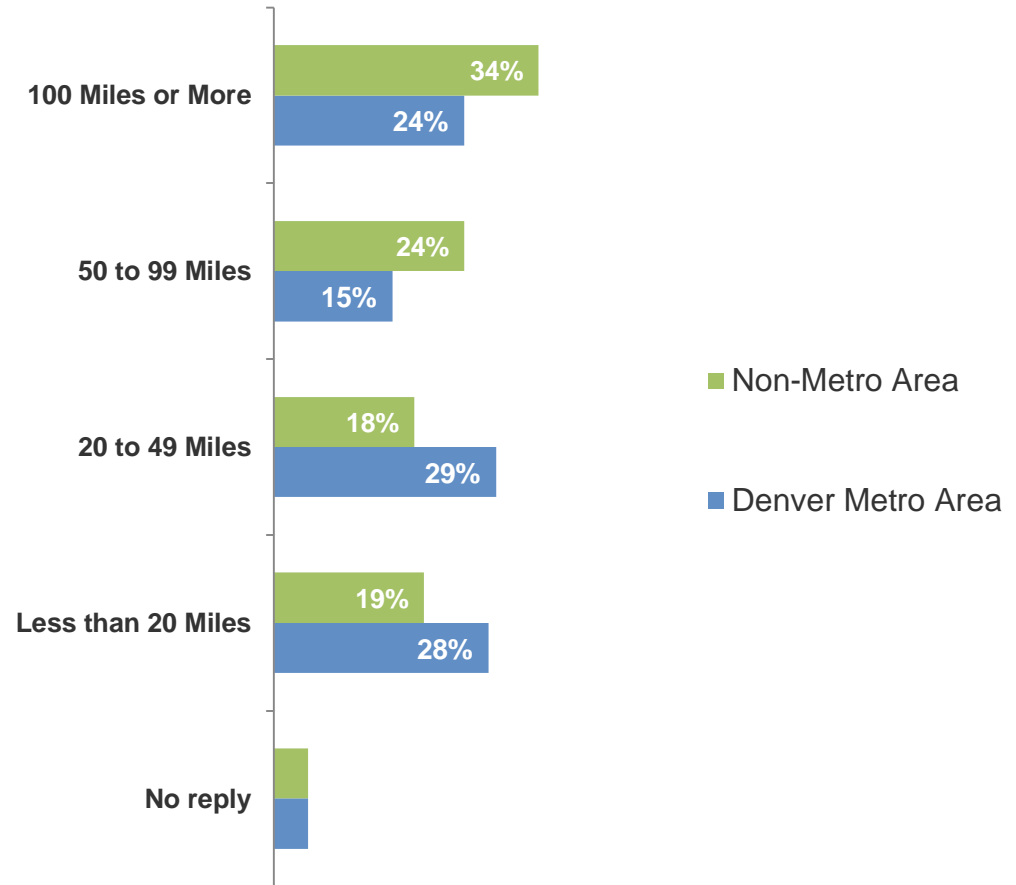
- ➔ 92 percent said that if they could eliminate barriers to doing so, they would like to do participate in more arts and culture.
- ➔ The most frequently mentioned cultural activity that respondents wanted to do more of was again, visiting a museum.



Q8. Which of the following things would you like to do more of if there were no barriers to doing so? *Check up to three.*

Coloradans outside of the Denver Metro area travel longer distances for cultural activities

➔ The Denver Metro area is a strong draw for arts and culture. People outside the metro area are notably more likely to travel more than 50 miles to attend an arts or culture event, and those who travel likely travel to the Denver Metro area (based on distance profiles).

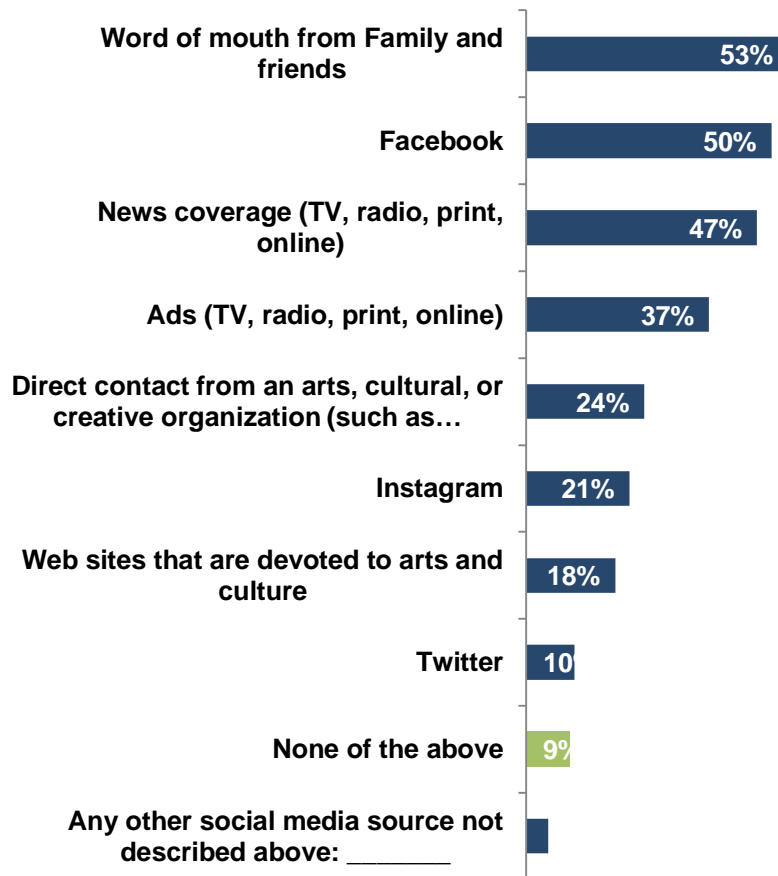


Q7. Over the past 12 months, what's the furthest (in miles) you've traveled for any of the activities you listed in the previous question?

Arts and Culture News and Information

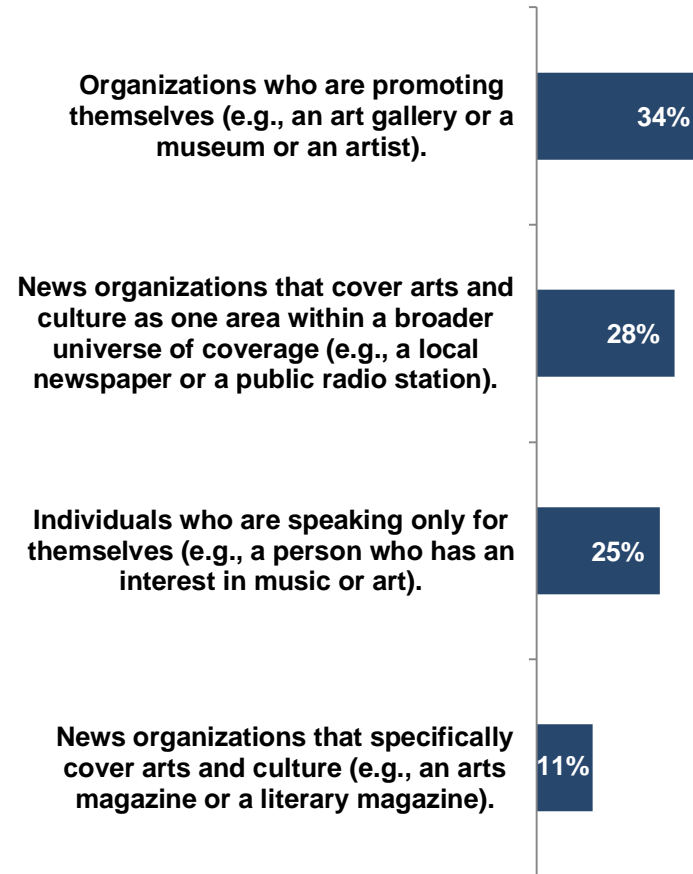
Word of mouth, Facebook, and television are the most popular ways to get information about local art and culture

- ➔ Facebook is the most commonly used media source of news about arts and culture, trailing only word of mouth as an overall source of information.
- ➔ Facebook is the most commonly used news source among the 25-54 age group, and is a top-three source among those 55 and older.
- ➔ Instagram is ranked lower overall, but is roughly equal to Facebook for the 18-24 age group.
- ➔ News coverage ranks a close third overall, with the top ranking among respondents age 45 and older (even above word of mouth).



Coloradans most frequently consume social media about arts and culture from organizations who are promoting themselves

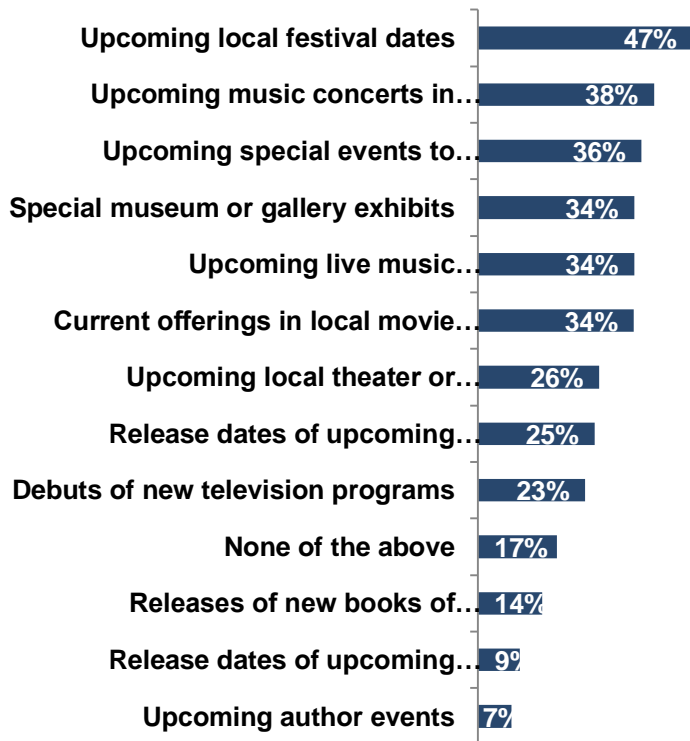
- ➔ People who receive arts and culture information on social media get it from different types of news sources. However, the most common source is from the arts and culture organization itself (via its own social media feed), followed closely by broad news organizations and by individuals who cover arts and culture as a personal interest.
- ➔ About one in ten said the social media they follow related to arts and culture came from news organizations that specifically cover arts and culture.



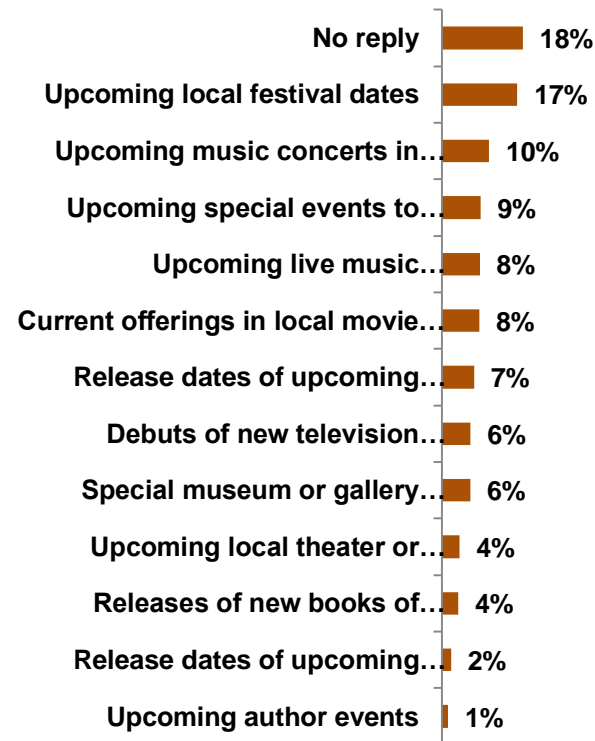
Q25. Who produces the social media that you follow most closely to get information about arts and culture?

Coloradans are most interested in cultural calendars related to local festivals and music concerts

Arts and Culture Calendar Listings Regularly Sought Out

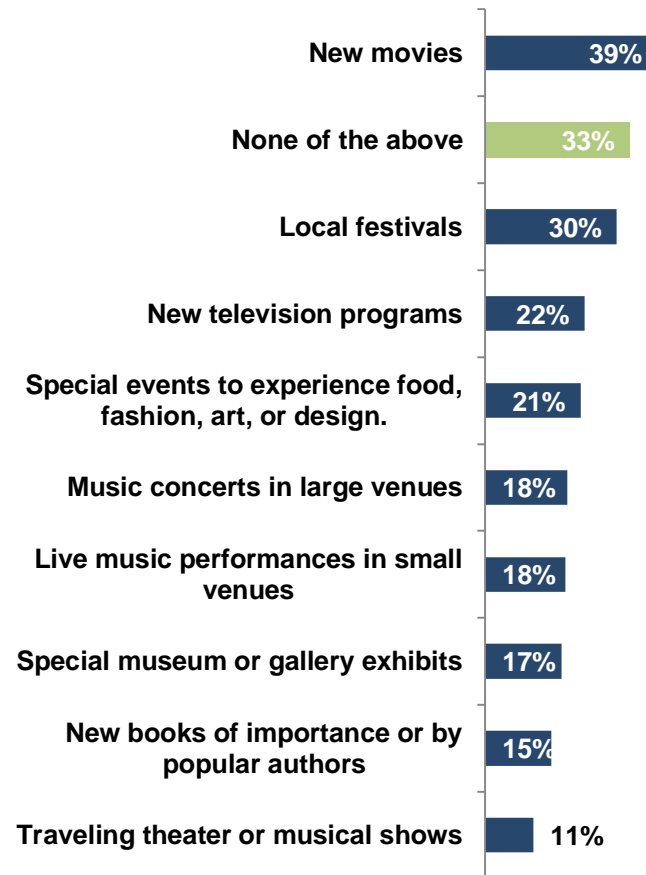


Arts and Culture Calendars Most Valuable



Coloradans are most frequently interested in movie reviews/critiques

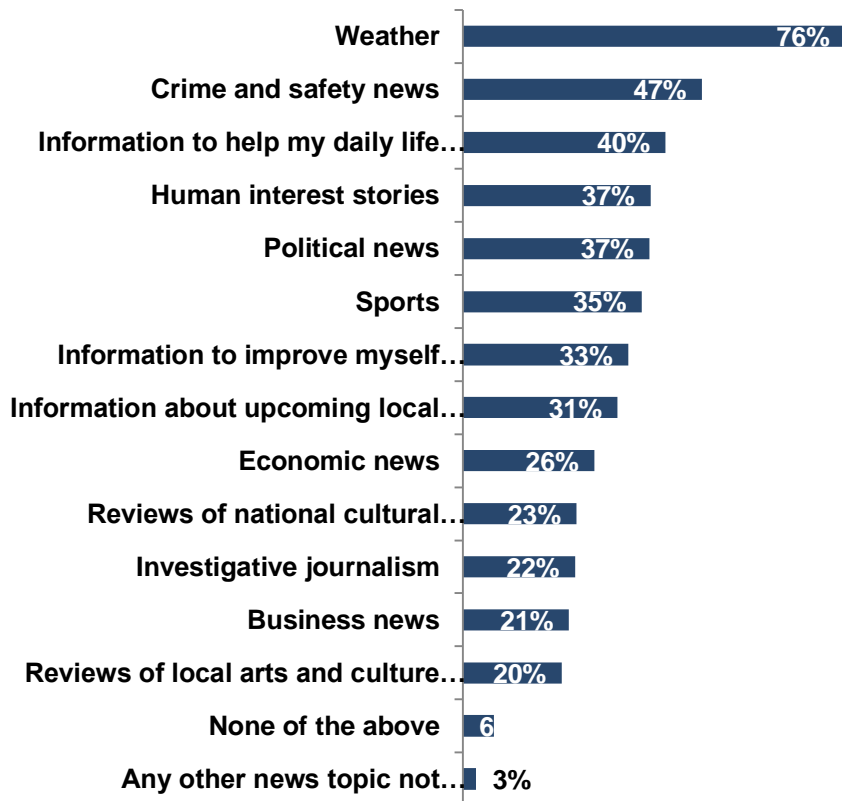
- ➔ One third of respondents said that they did not regularly seek out reviews or critiques of arts or culture in their local area.
- ➔ In a follow-up question, 22 percent of Coloradans said that reviews or critiques of new movies were most valuable to them.
- ➔ The next most popular item was reviews or critiques of local festivals coming in at 11 percent.



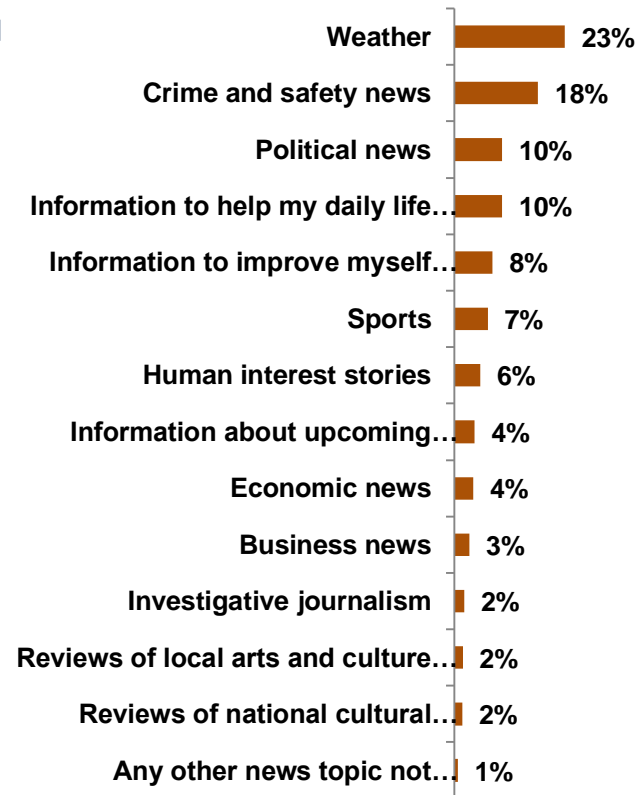
General News Consumption

Coloradans most frequently keep up with local or state-level news related to weather

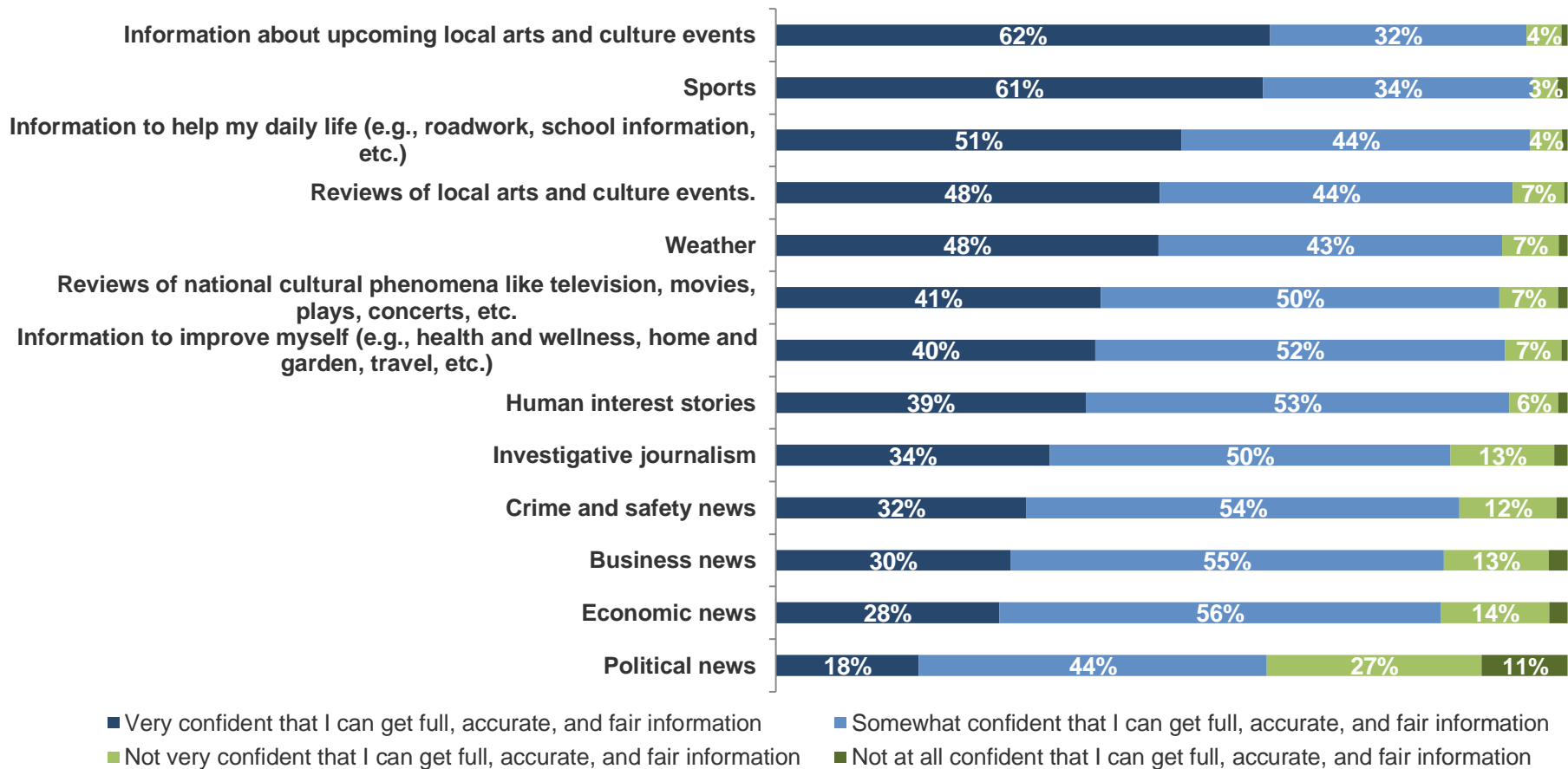
Regularly Keep up With



Most Important to Follow

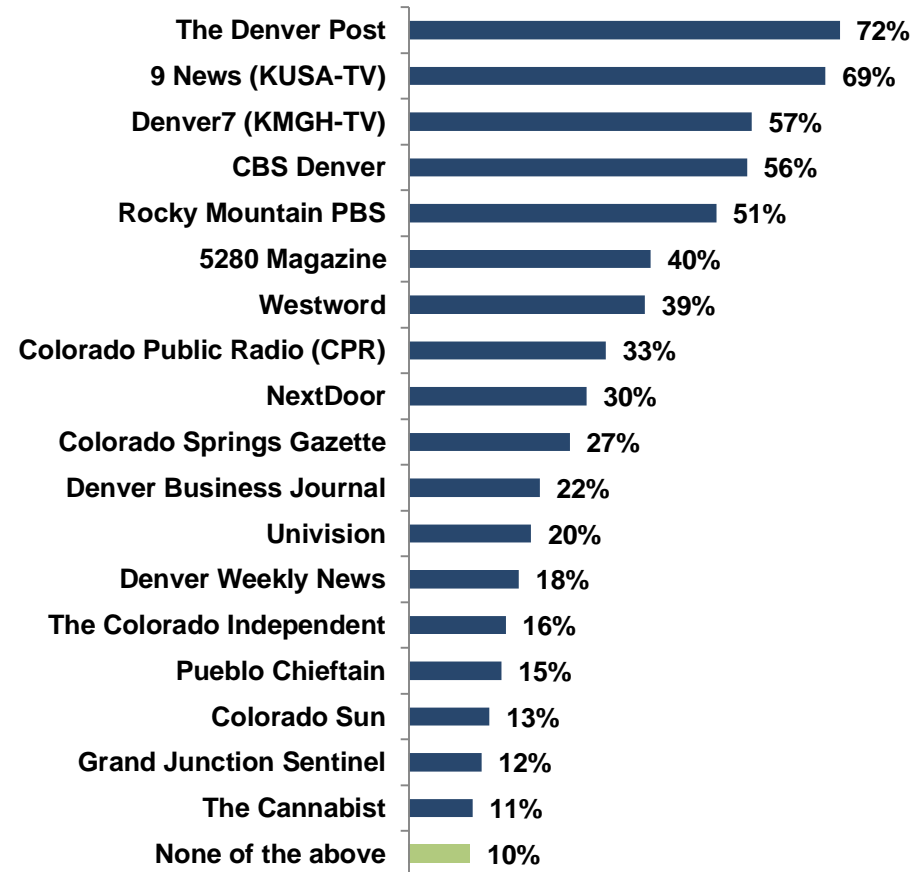


The vast majority of Coloradans are “very” or “somewhat” confident in getting accurate information about local arts and cultural events



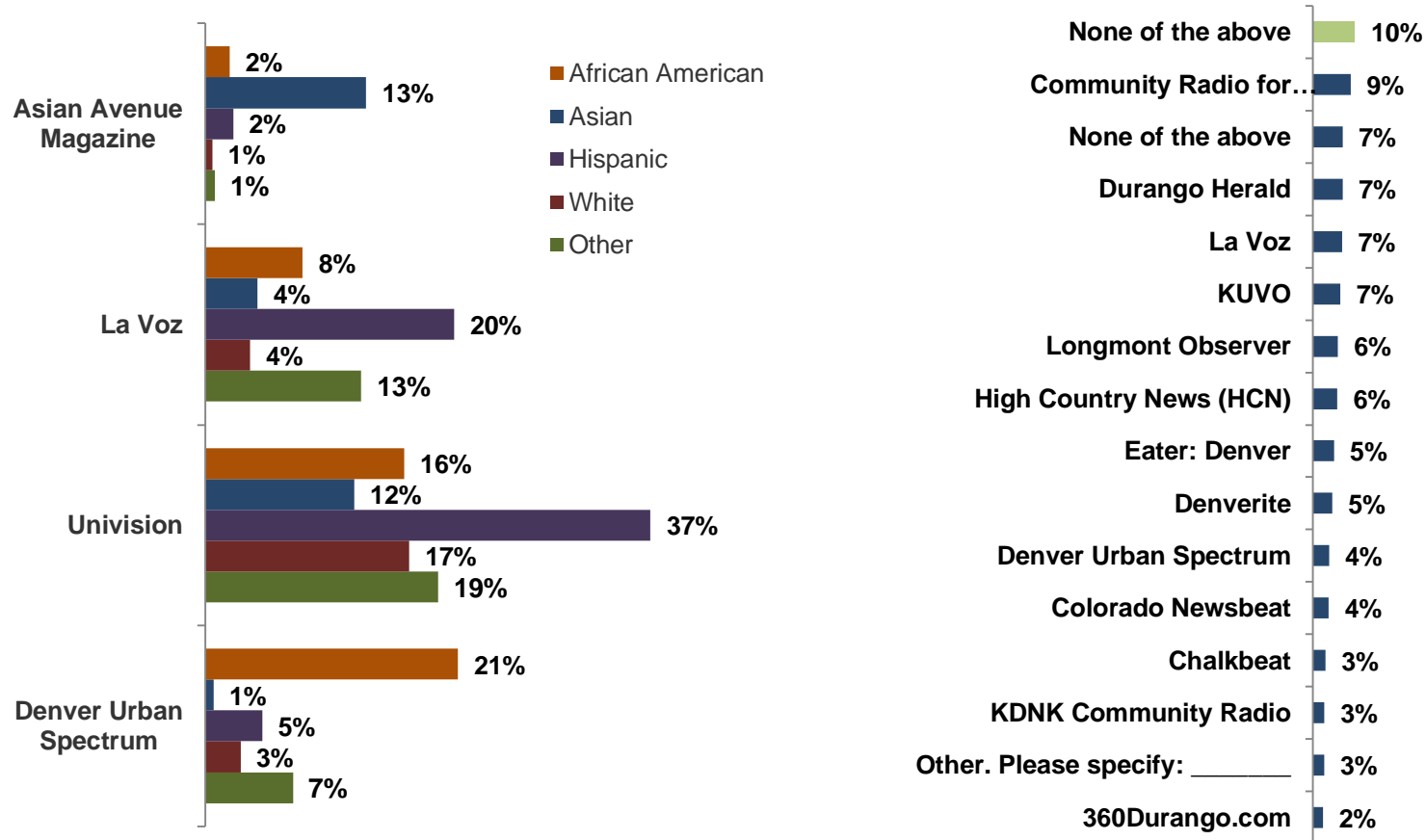
The most familiar outlets have a wide geographic and topical reach

- ➔ Not surprisingly, awareness of specific media outlets is highest among those with the largest geographic reach.
- ➔ Television stations that have large market areas tend to be the most well known (9News, CBS Denver, Denver7, Rocky Mountain PBS, all with awareness in the 50 to 70 percent range), topped only by the state's largest newspaper (Denver Post at 72 percent).
- ➔ Media outlets that target particular demographic niches tend to have much higher awareness in those niches. For example, Univision has 37 percent awareness among Hispanics but only 20 percent overall statewide awareness.



Q14/15. Which of the following information outlets are you aware of? *Check all that apply.*

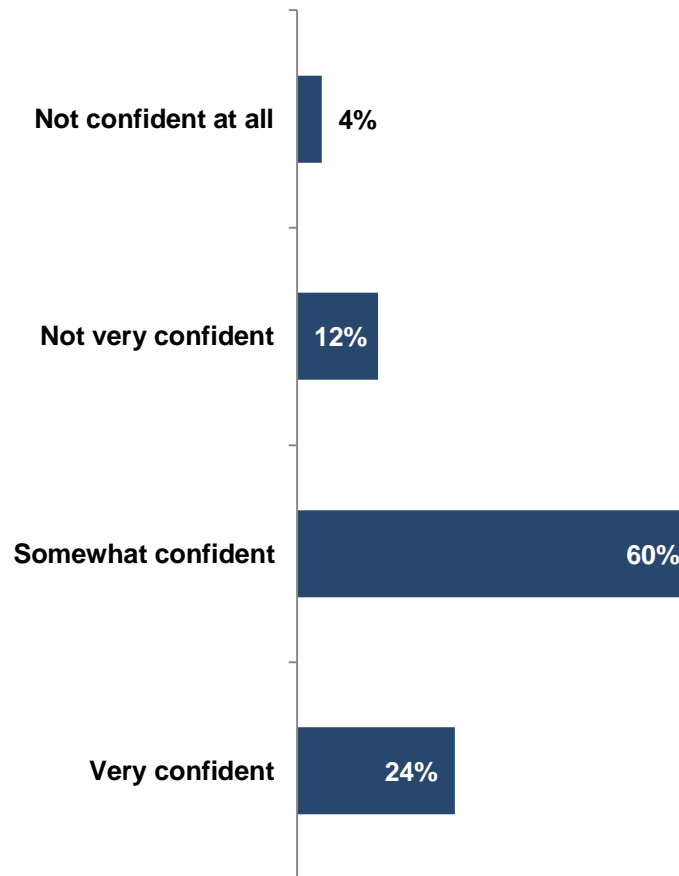
The least familiar outlets are geographically or topically focused, though some outlets have greater awareness amongst targeted demographics



Q14/15. Which of the following information outlets are you aware of? *Check all that apply.*

Most Coloradans are confident in local news sources

- ➔ People are generally relatively confident that their local news media will give them full, fair, and accurate information. 84 percent are somewhat confident or very confident in this.
- ➔ On par with national patterns, Democrats are more trusting of local news than Republicans (32% of the former saying they are “very confident” compared to 17% of the latter).

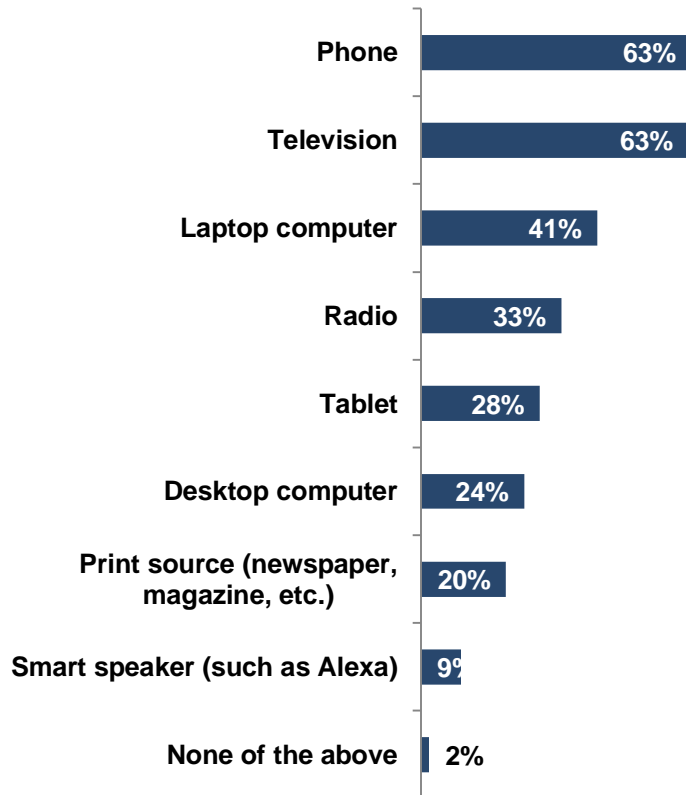


Q16. How much trust do you have in your local news sources when it comes to reporting the news fully, accurately and fairly?

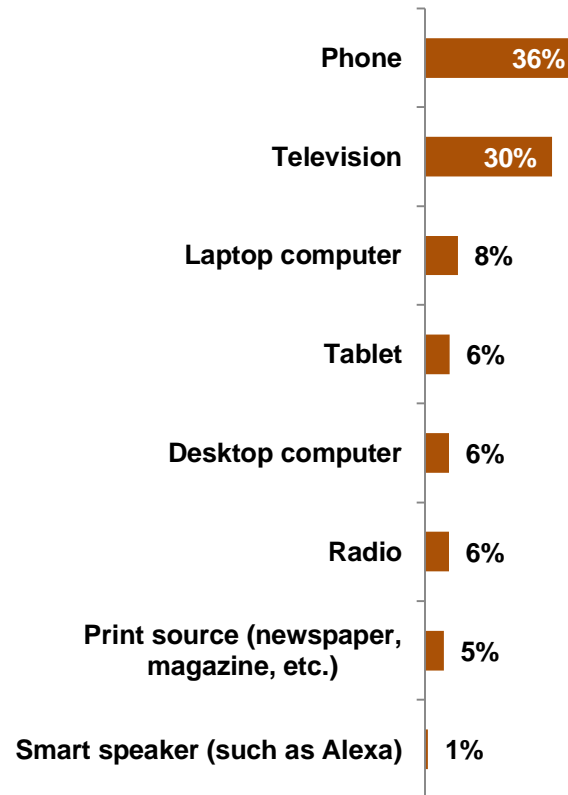
General News – Tools and Methods

Phones and television are the most commonly used tools to get news and community information

Regularly Use

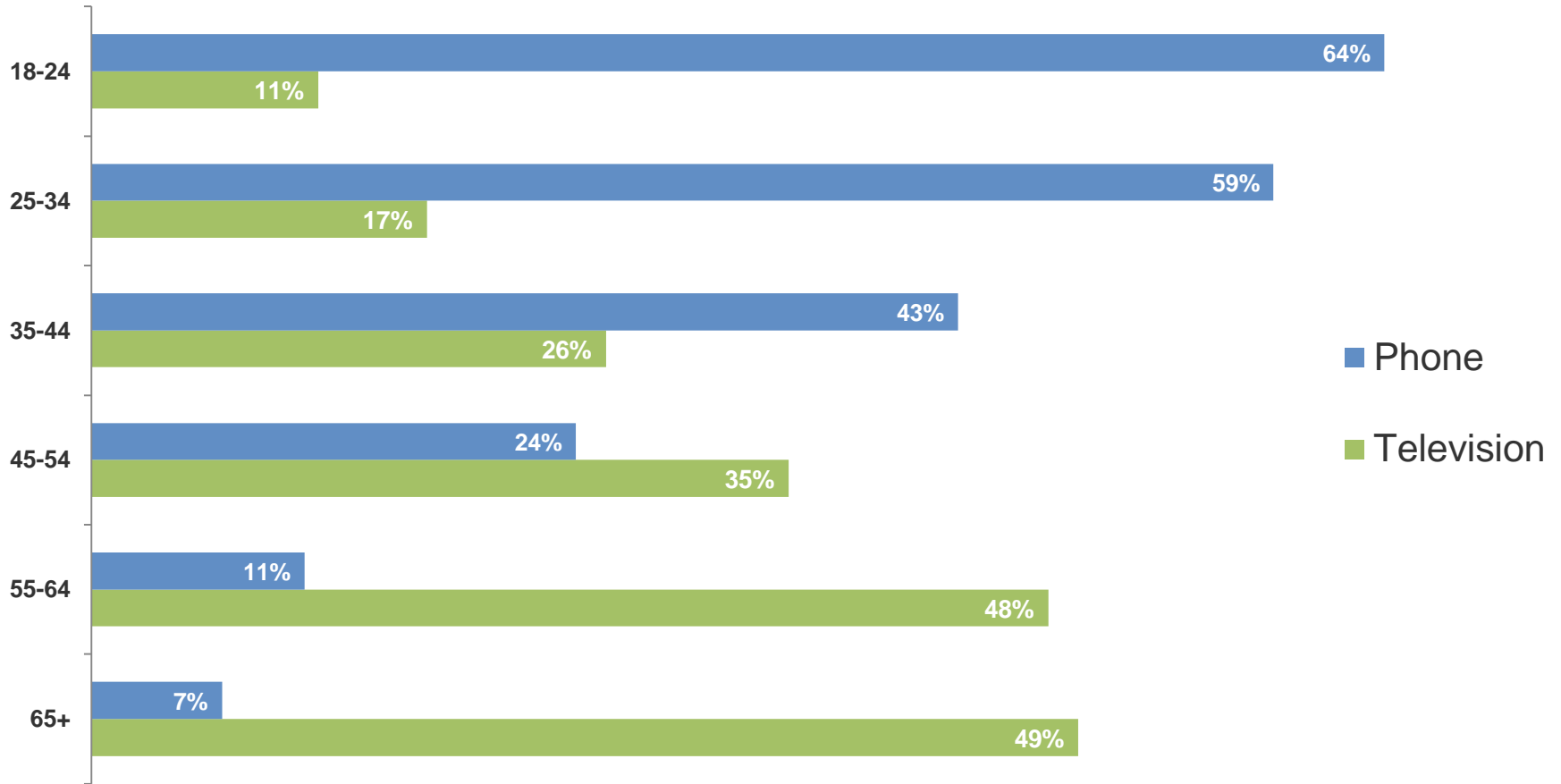


Use Most Often



Q12. Which tools or methods do you regularly use to obtain news and community information? Check all that apply. Q13. Which of these tools or methods do you use most often to get news and community information?

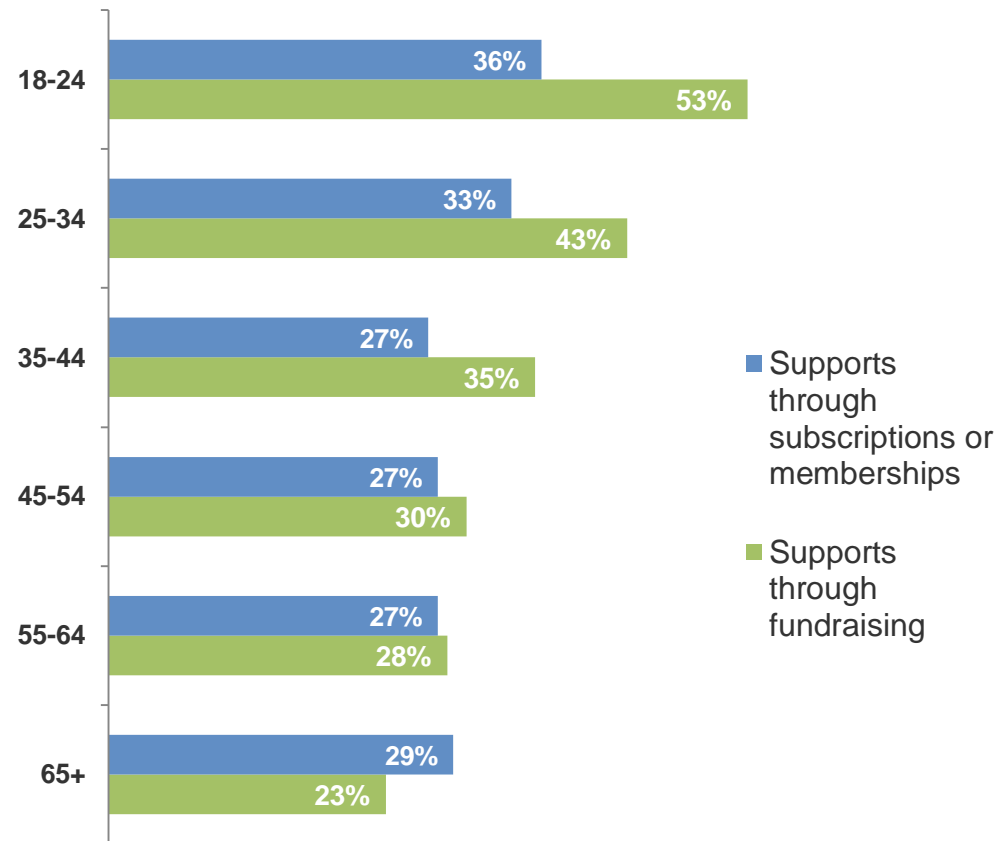
Younger people primarily rely on their phones while older people use television to get news and community information



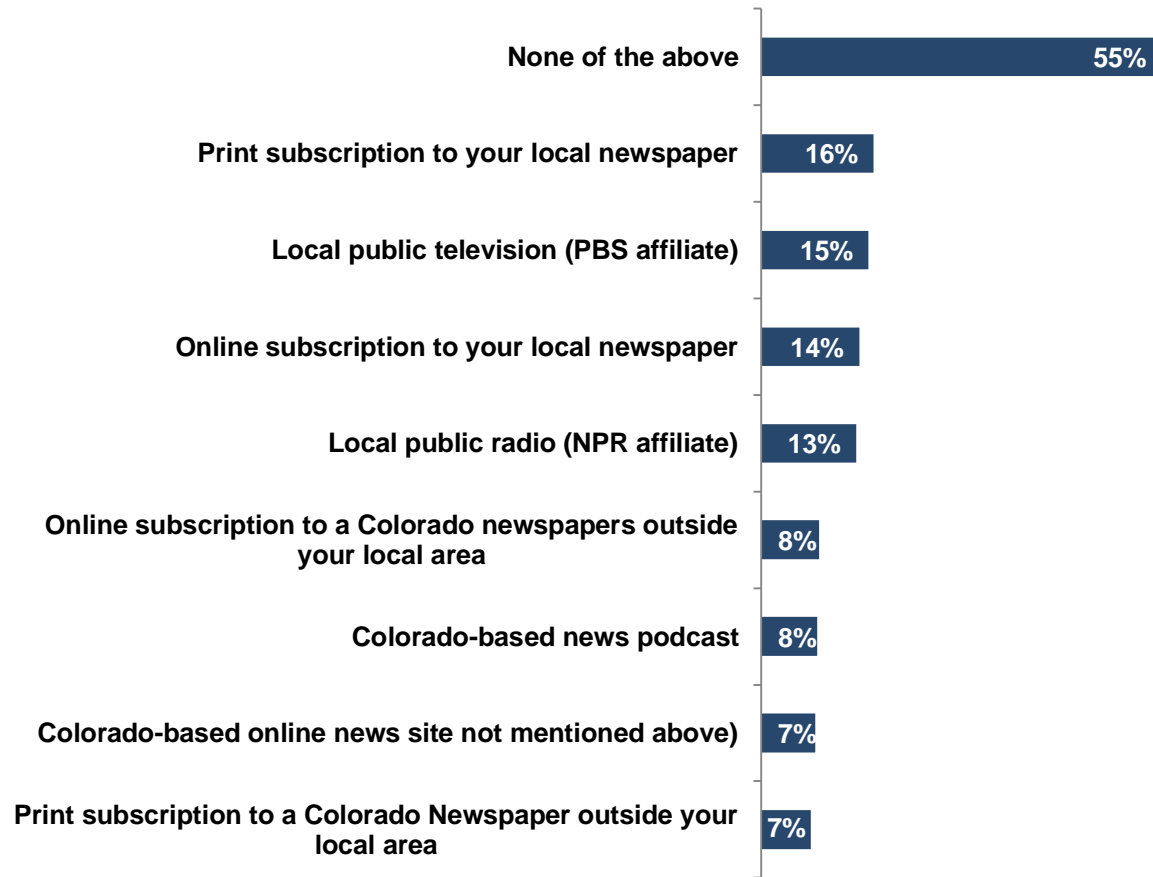
Financial Support of News

Younger Coloradans financially support local news organizations at higher rates

- ➔ 36 percent of all respondents say that they participate in some sort of fundraising for new organizations.
- ➔ The rate is slightly higher among minorities, younger people, and Democrats. The rate is lower among people who rely most on television to get their news.
- ➔ Among all respondents, 30 percent support news agencies with subscriptions or memberships.



45% of respondents said they supported at least one specific local news source directly with membership or subscription

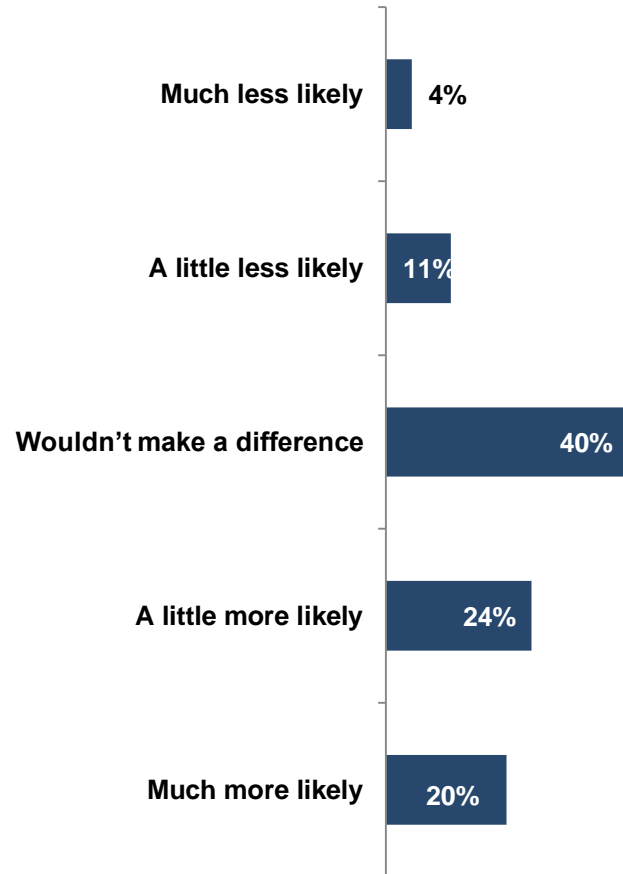


Q28. Do you support the following local news sources directly with memberships or subscriptions? *Check all that apply.*

News Partnerships

Coloradans with current cultural memberships are more positive than negative about bundling with local news, but many are indifferent

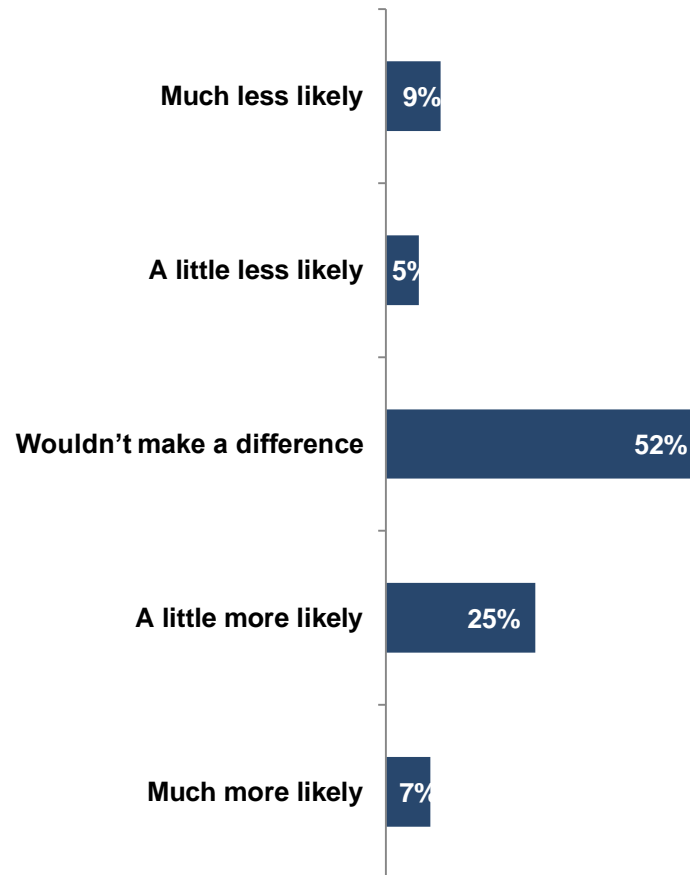
- ➔ Among those with current memberships, 84 percent said that this type of bundling would have no impact or even have a positive impact on their decision to renew their membership. The goal with this group would be to assuage the concerns of the 15 percent of respondents who say that it would make them less likely to renew.
- ➔ The 15 percent that would be less likely skews toward older people, (slightly) toward Denver metro residents, toward Republicans, and toward those who don't trust the media.



Q32. You mentioned that you are a paying member of an arts or culture organization. How likely would you be to renew this membership if the cost rose, but it began including financial support for a local news source that you trust?

A majority of those without memberships to cultural organizations are indifferent to bundling

- ➔ Among those who are not currently members of an arts or culture organization, 32 percent said that this type of bundling would have a positive impact on their decision to become a member.
- ➔ This 32 percent skews slightly toward Democrats and those confident in the news, but no other patterns are evident. The remainder are neutral or negative, which is not a concern since they're not currently spending money in this area anyway.
- ➔ As a population, the non-member market is 6.1 times larger than the current member market.

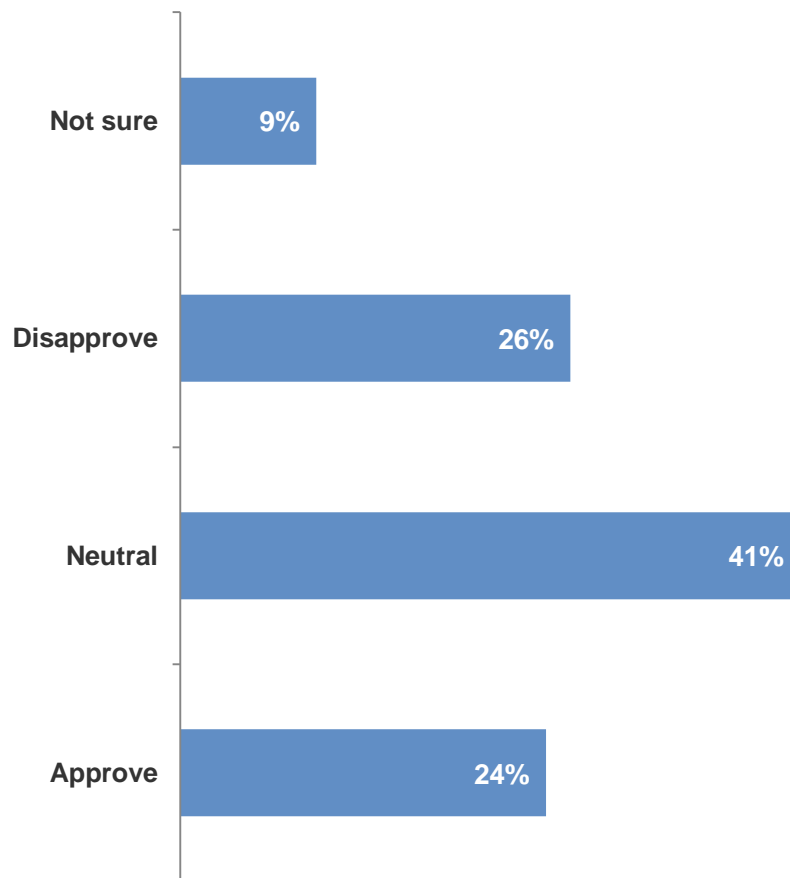


Q31. Would you be more likely or less likely to purchase a membership in an arts and culture organization if it included support for a local news source that you trust, or vice versa?

News Funding Options

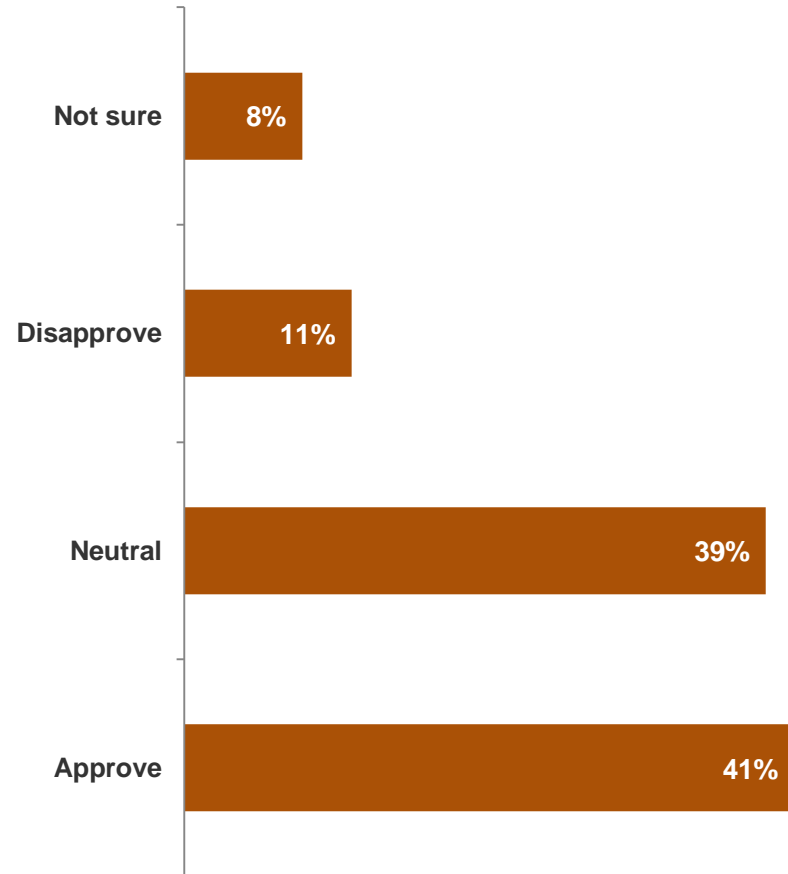
The public is split on outright public funding of news, with 24 percent in support of it and 26 percent opposed

- ➔ However, a large proportion (51 percent) are neutral or unsure. People under the age of 45 tend to support the concept, while those 45 and older lean more toward opposition. The large number of neutral respondents likely means that they do not feel that they know enough to have a position.
- ➔ The higher the education levels go, the more likely that the person has an opinion, though the relative sentiment is consistent across education levels. People who trust the news also tend to support public funding



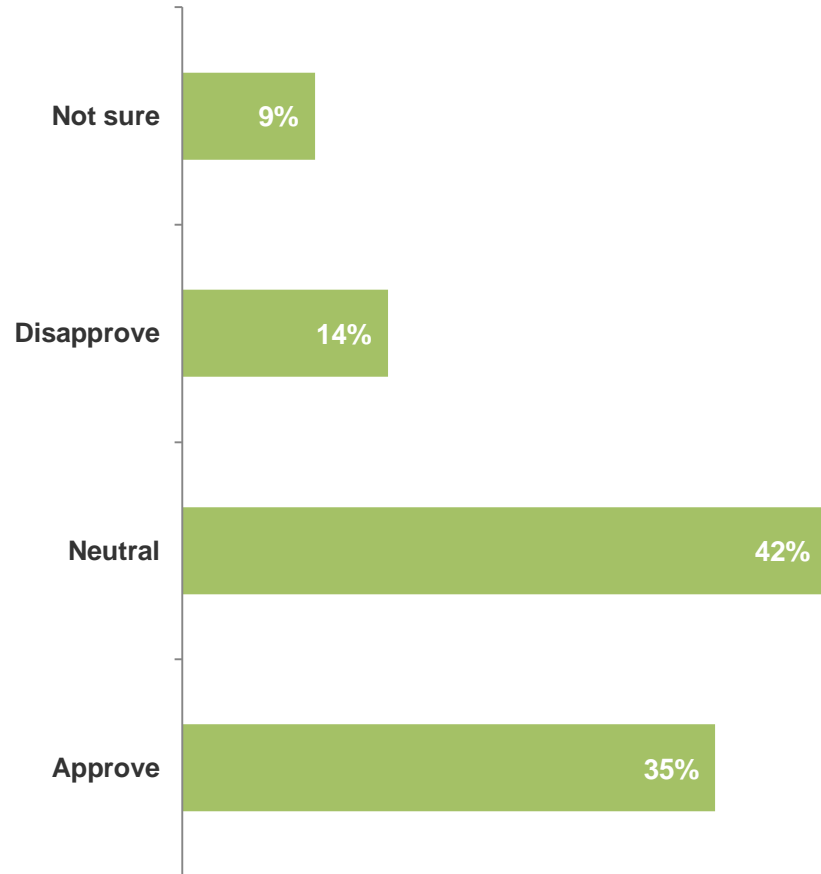
Coloradans are more supportive of public funding for local news via libraries

- ➔ In contrast, the public is more supportive about public funding of news via libraries, with 41 percent supporting it and only 11 percent opposing it.
- ➔ The remaining 48 percent were neutral or unsure. All major political factions were more likely to support the concept than oppose it, though over 40 percent of each political affiliation were neutral or unsure.
- ➔ Support tends to decline slightly with age and rise slightly with education, but all age and education groups are more likely to support the concept than oppose it



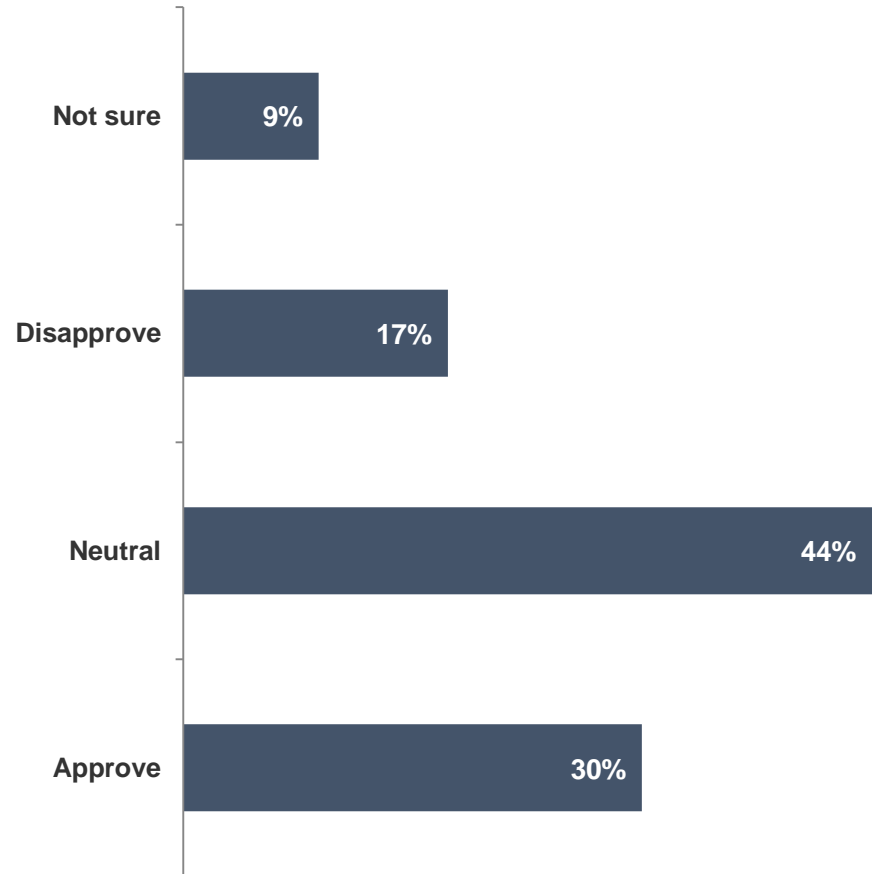
Support for grant funding of news is slightly lower than support for library-run news, but notably higher than the general concept of public funding

- ➔ Support outweighs opposition by a margin of 35 percent to 14 percent; however, 51 percent of the population is neutral or unsure.
- ➔ Opposition tends to increase with age, but all age groups are more likely to support than oppose this option. Republicans are split on this issue, but Democrats and Independents lean more positive than negative.



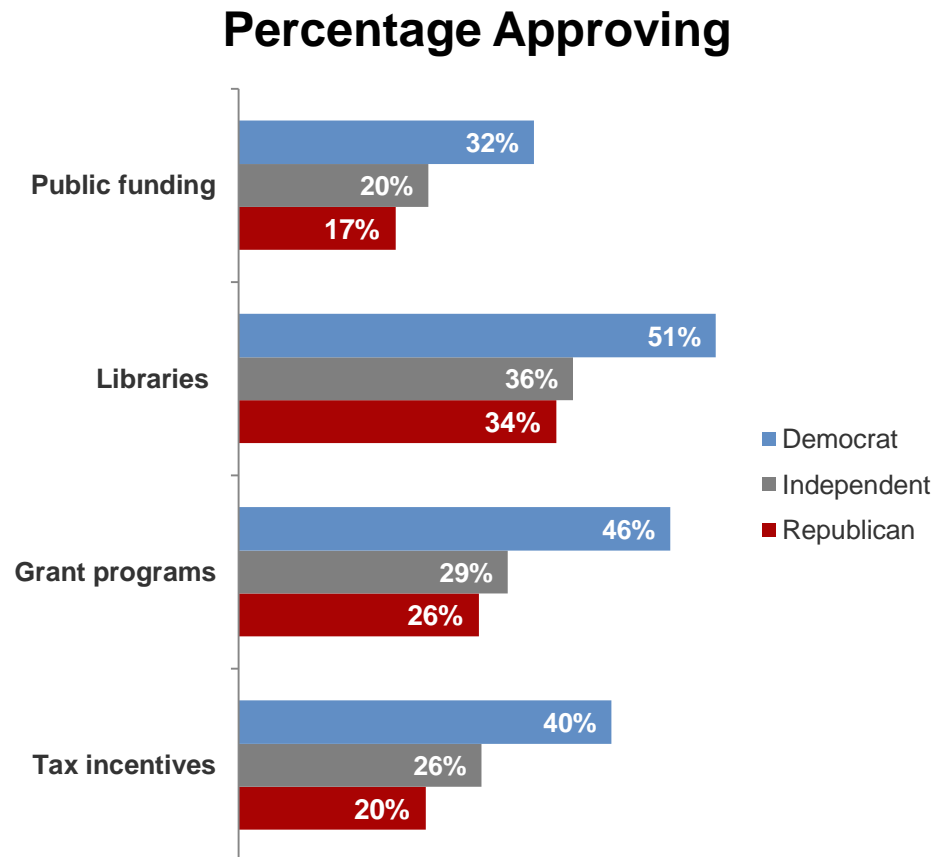
Support for tax-incentive funding of news is slightly lower than support for library-run news or grants-funded news

- ➔ Support outweighs opposition by a margin of 30 to 17 percent.
- ➔ Again, a majority of the population is neutral or unsure. Opposition increases somewhat steeply with age, to the point where more seniors (65+) disapprove than approve. but all age groups are more likely to support than oppose this option.
- ➔ Republicans are more likely to disapprove than approve on this issue, but Democrats and Independents lean more positive than negative.



Approval of funding varies by partisanship

- ➔ The general concept of public funding is negative for Republicans but specific proposals fare better, in some cases skewing more positive than negative.
- ➔ This implies that Republicans are more likely to see merit in specific proposals, even if those proposals don't necessarily support their general philosophy. The same pattern of supporting more specific proposals exists for Democrats and Independents, but Democrats already start with positive perceptions of public funding and Independents more from a neutral stance to a positive stance.



About Corona Insights

Our founder named the company Corona because the word means “light.” It’s the knowledge that surrounds and illuminates an issue; exactly what we provide. Our firm’s mission is to provide accurate and unbiased information and counsel to decision makers. We provide market research, evaluation, and strategic consulting for organizations both small and large.

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