DOBC CONSUMER INSIGHTS PROJECT - FULL REPORT

AnalysisWorks

TABLE OF CONTENTS

Funding for this project was provided by Amplify BC. Any opinions, findings, conclusions, or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Creative BC or the Province of BC. The Province of BC an its agencies are in no way bound by the recommendations contained in this document.

1. METHODOLOGY

DoBC Media's platform and service intersect with the majority of the BC Music Industry helping local music talent develop, and expanding audiences with BC's largest database of active users, venues and a wide variety of other entertainment options.

With over 50,000 registered active users, 1,700 venues and restaurants in their database, and over 3,000 BC bands registered; DoBC Media occupies a unique position to conduct a consumer focused study on the BC music market, developing insights from its communities on the user, business and creative constituents of the local music industry.

In August 2018, the project team reviewed the past year of data and interactions on the DoBC platform to inform the direction of their consumer-focused study. Through that review the team arrived at the following areas to research:

- Music engagement and consumption in BC
- Music's perceived value vs other entertainment categories
- Most impactful media within music and entertainment
- Artist and Event discovery
- Barriers to consuming live music and other categories of entertainment
- The Economic impact of music (ie concerts & festivals) vs other categories

Once the scope of research was determined the team developed a survey to build a quantitative approach to these questions, and delivered the survey through Creative BC, DoBC, Atomique Productions, and The Vancouver Jazz Festival's mailing lists and through online promotions.

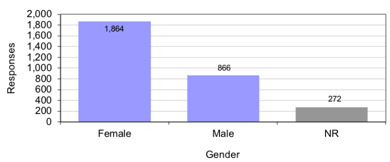
With over 3,000 responses between September - November 2018, and a greater than 95% completion rate for the survey, DoBC and Analysis Works built a substantial set of data to analyze and develop a snapshot of BC consumer habits and trends in music, entertainment and media. Results have been cleaned, sorted and analyzed developing a snapshot of BC consumers media consumption, music engagement and involvement by region, age, and gender.

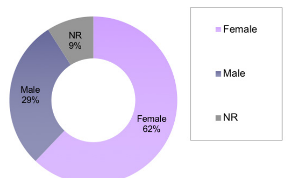
The following report on this survey draws out some of the key findings, full responses and raw data from the survey can be found in an appendices of this report.

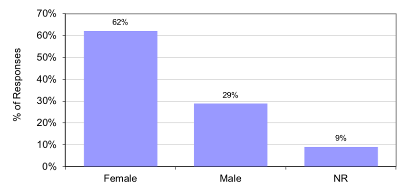
SURVEY RESPONDENT INFORMATION

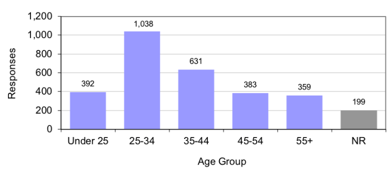
The DoBC survey collected responses from 3,002 BC residents:

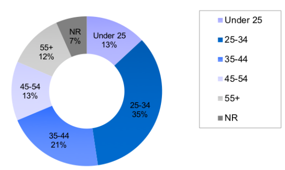
- 1,864 Females (68%) / 866 Males (32%)
- 1,143 responses from Greater Vancouver, 829 from the lower mainland, 723 responses from Victoria
- Age of respondents: 13% were <25, 35% were 25-34, 21% were 35-44, 13% were 45-54, 12% were 55+
- Diversity: 13% report being part of a visible minority, 10% self-identify as LGBTQ, 4% self-identify as indigenous.
- This survey was delivered via the mailing lists of DoBC, Atomique Productions, Creative BC, TD Vancouver Jazz Festival, and promoted online via Facebook, Instagram and Twitter.

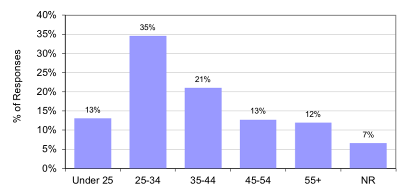


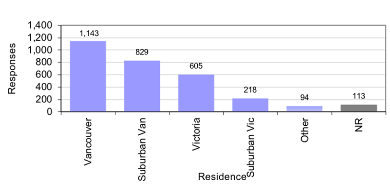


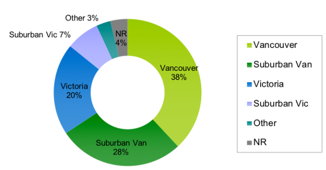


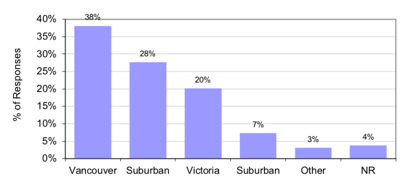


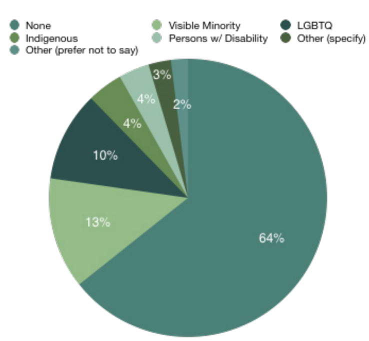












SURVEY QUESTIONS

Survey Questions:

Q1. Where in BC do you live?

Q2. Which social media do you use?

Q3. Social outings / planning

Q4. How often do you go out / month?

Q5. Most events I attend are categorized as

Q6. How do you learn about events?

Q7. How do you learn about music events?

Q8. Media consumption in the last week?

Q9. What genres of music do you listen to?

Q10. Music (artist) discovery

Q11. Important factors for a night out?

Q12. How far do you typically travel to go out?

Q13. Favourite BC Concert Venue?

Q14. Favourite Restaurant?

Q15. How do you usually get to events?

Q16. How far in advance do you plan?

Q17. Average personal spend per outing?

Q18. $50 spending choice?

Q19. $100 spending choice"

Q20. Avg ticket / cover price?

Q21. Most paid for ticket?

Q22. Reasons for not going out.

Q23. Age

Q24. Gender

Q25. Diversity

2. CONSUMER BEHAVIOUR : MEDIA CONSUMPTION

What Media are consumers using? How do they discover Music and Events?

DoBC looked in to the media consumption of consumers, asking them to report what media they had consumed in the past week by responding with ‘Lots’, ‘Some’, or ‘None’ to the following media choices:

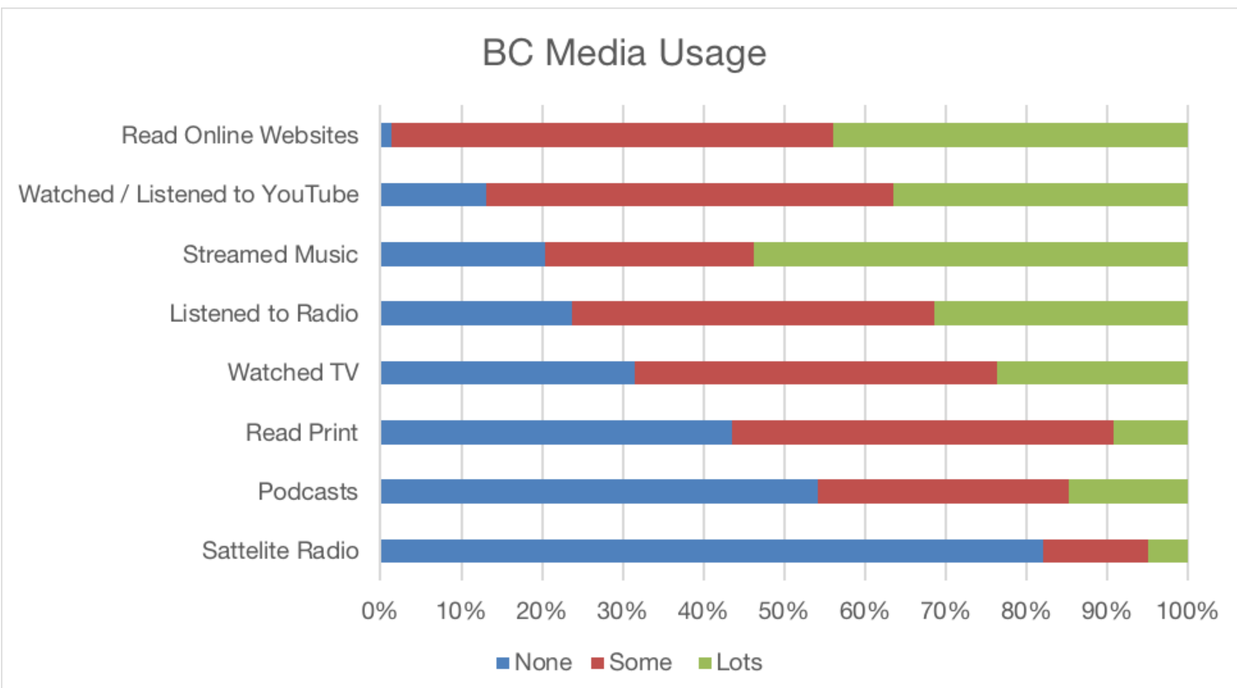
Radio, Streaming Music, Streaming YouTube, Watching TV, Reading Papers, Reading Online Websites, Listening to Satellite Radio, or Listening to Podcasts.

With 2,810 responses to this question, the survey demonstrated consumers at large favour digital media to traditional, with some predictable findings: digital media was more widely adopted by younger consumers while the older demos demonstrated higher rankings of traditional media.

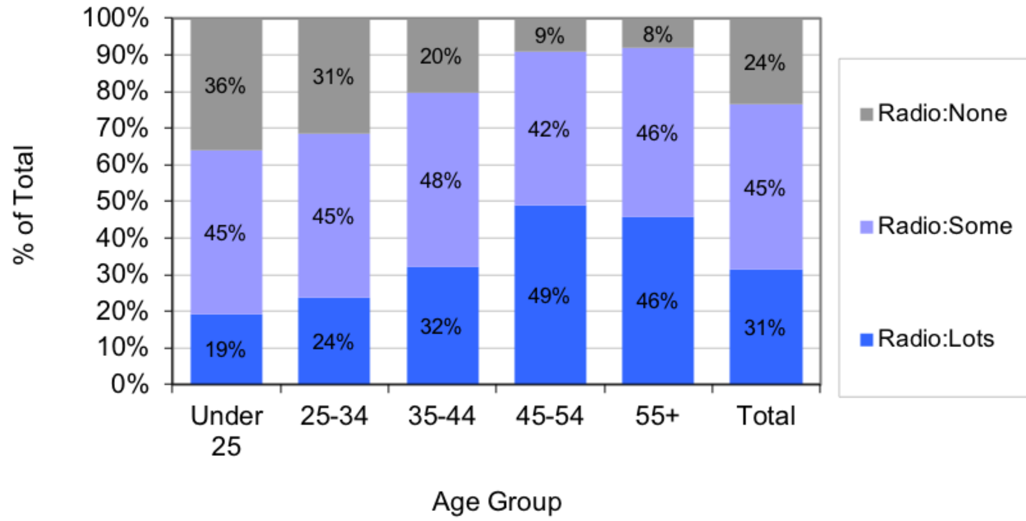
MEDIA USAGE

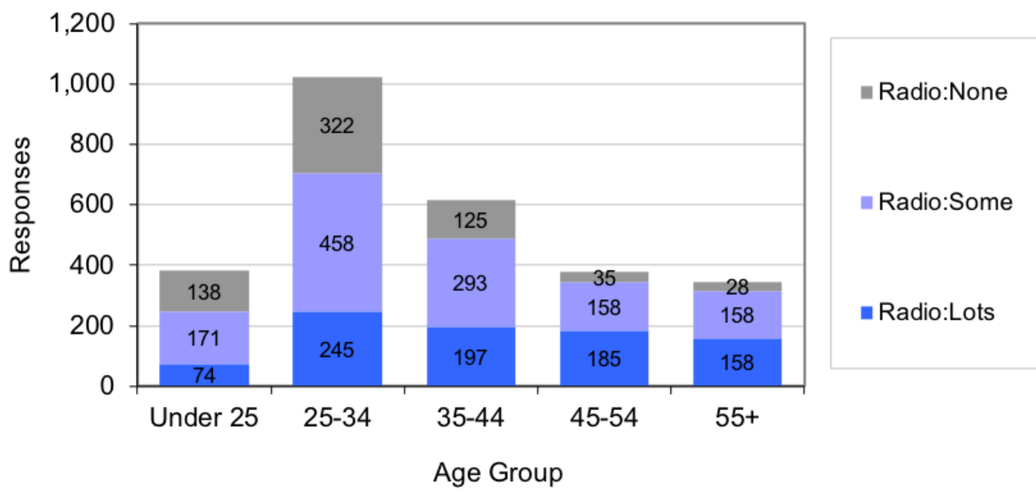
Digital media represented the top 3 most frequently used by BC consumers, with digital out-pacing traditional media across the board:

- Lots: 54% use of streaming services (lots), 43% for online websites, 37% for streaming YouTube, 32% listening to Radio, 24% watching TV
- Total use (Lots + Some): 95% read online websites, 87% stream YouTube, 80% use Streaming services, 76% Listen to Radio, 68% watch TV, 56% read print.
- The survey received under 10 write in responses for 'Vinyl' or 'listening to my own music' in this question.

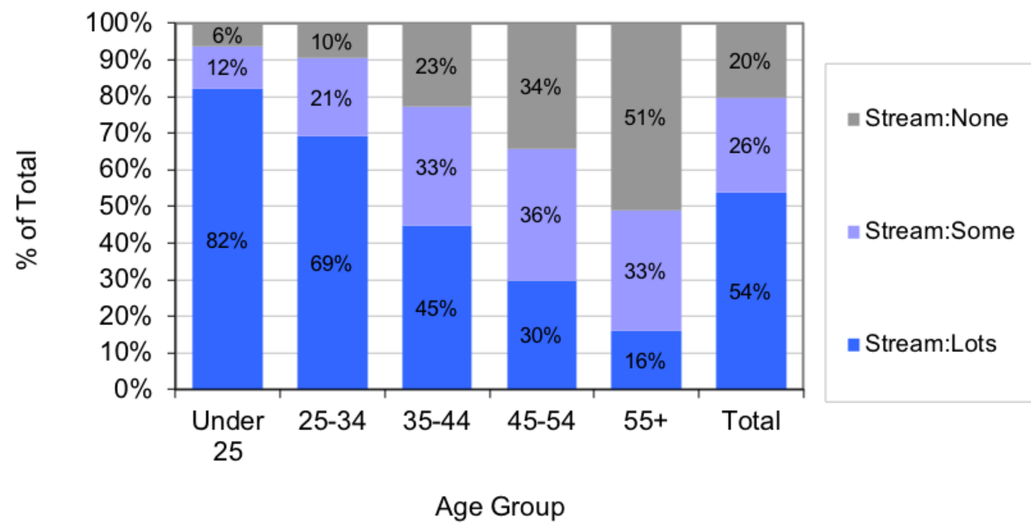


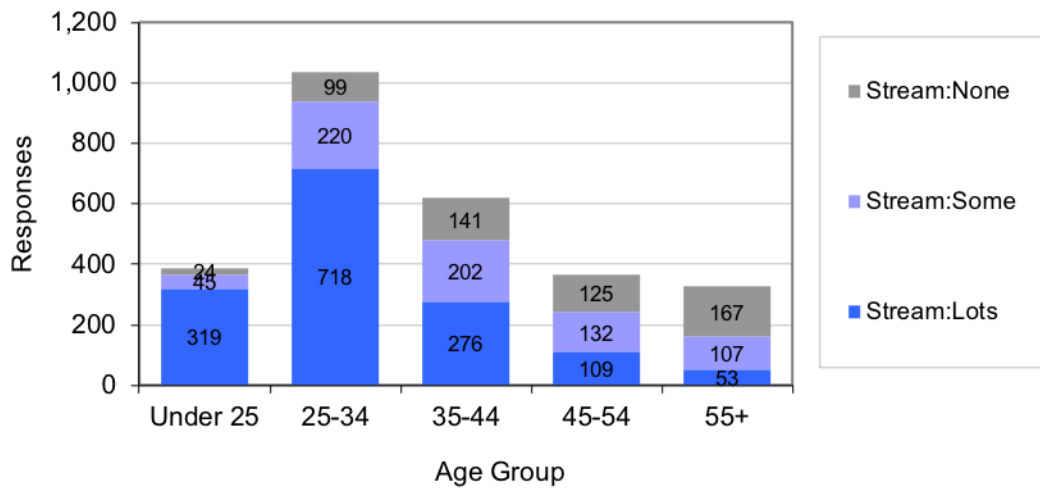
Radio: The proportion of respondents who listen to radio a lot increases significantly with age: more than doubling from 25-34's (24%) to 45-54's (49%)



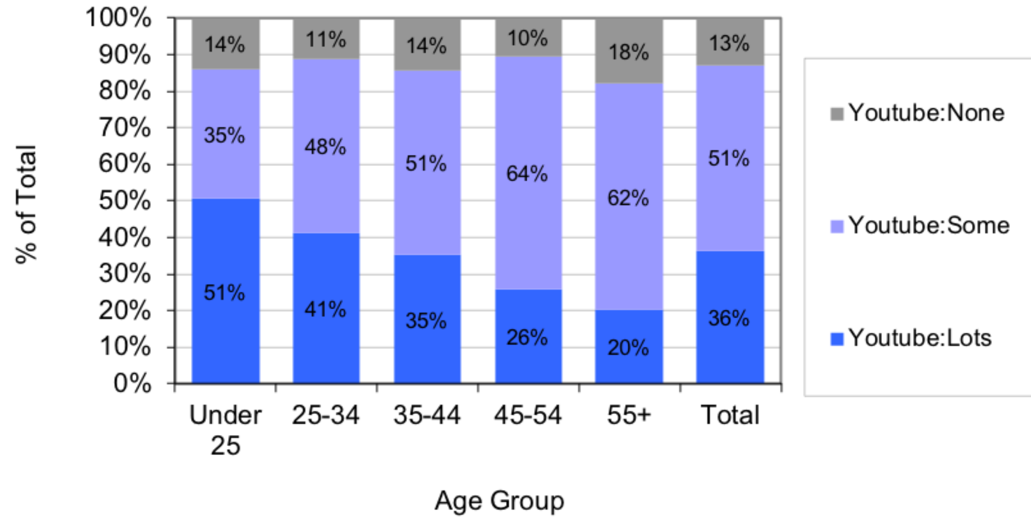


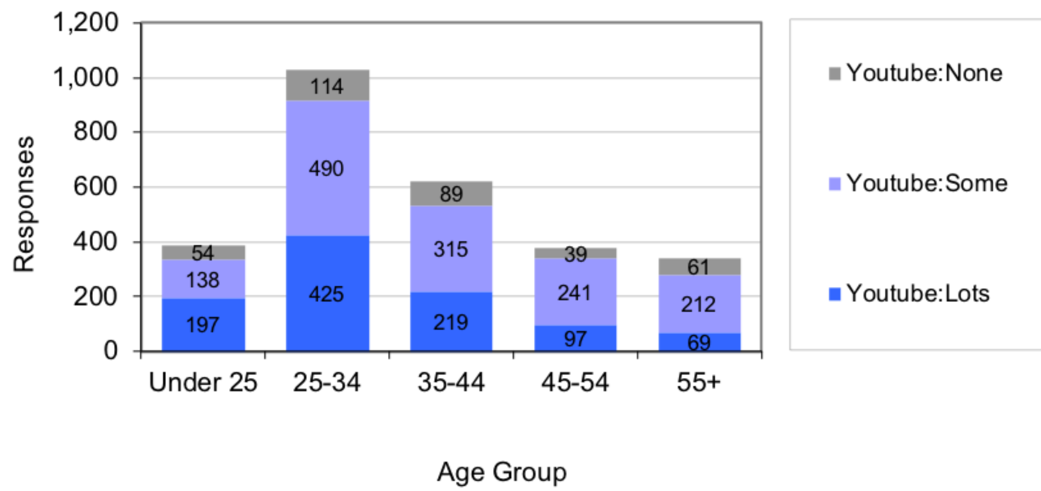
Streaming: The proportion of respondents who stream a lot is significantly higher for younger age groups: 82% for under 25's compared to 30% for 45-54's or 16% for 55+.



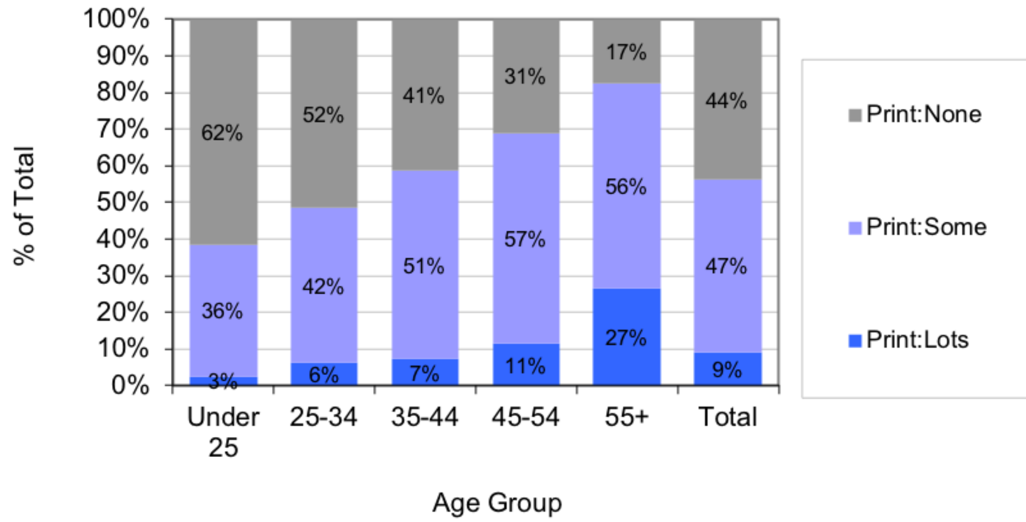


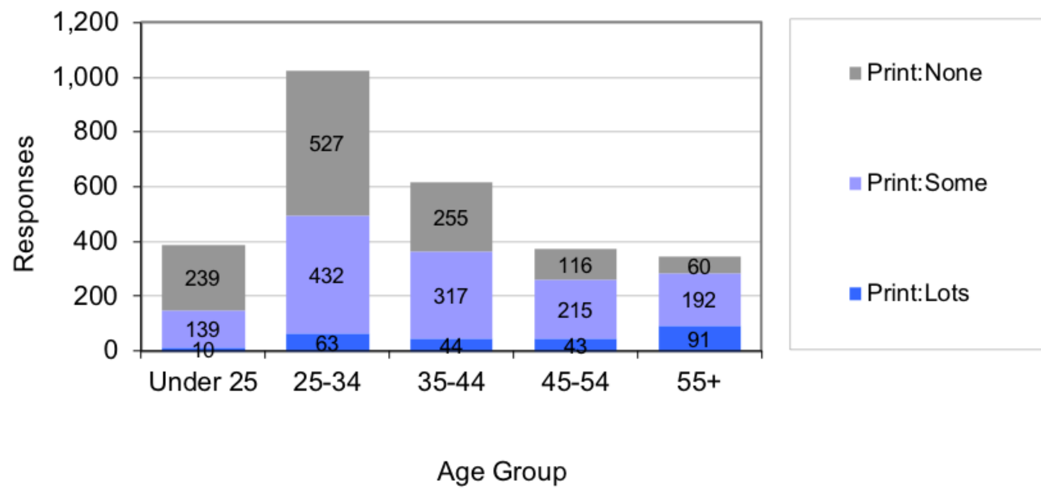
YouTube: The proportion of respondents who use YouTube a lot is significantly higher for younger age groups; All age groups reported using YouTube sometimes.



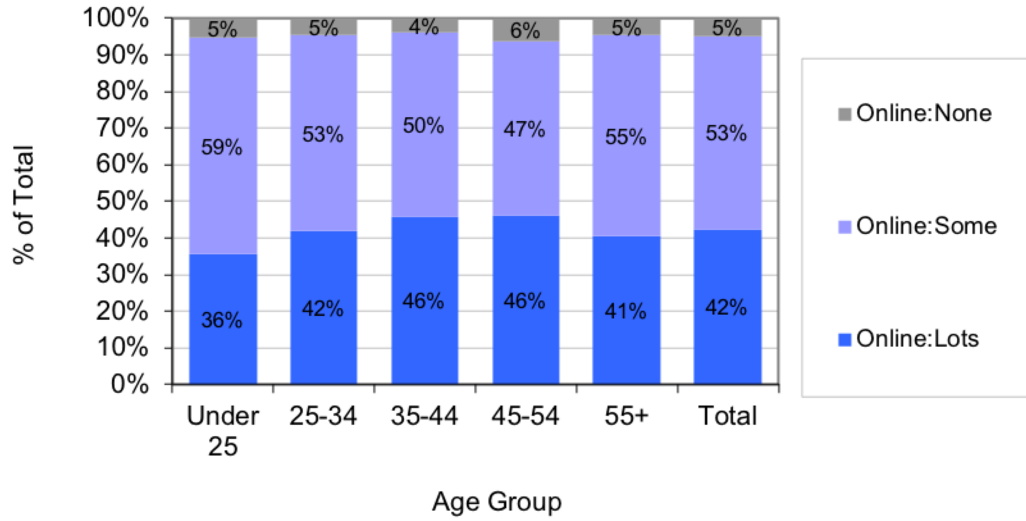


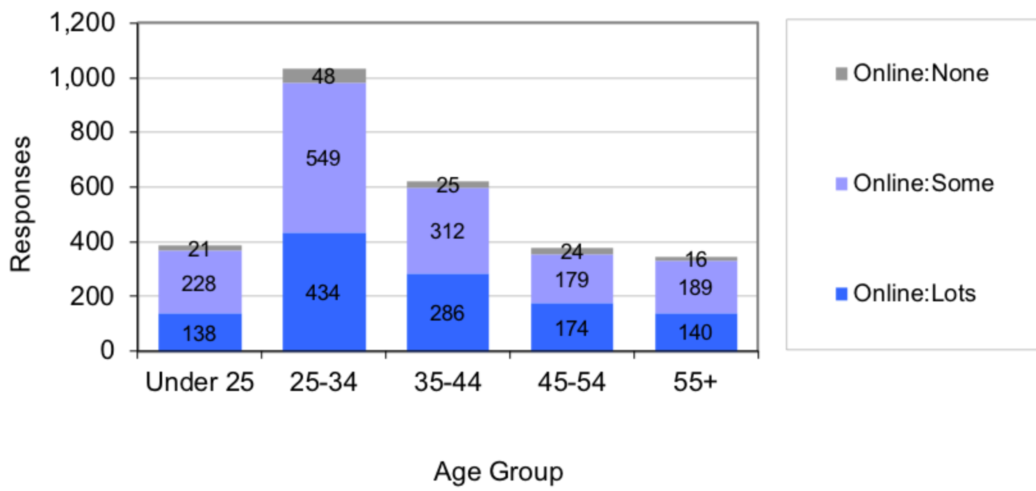
Print: The proportion of respondents who read Print is significantly higher for older age groups; but still very low compared to other media.



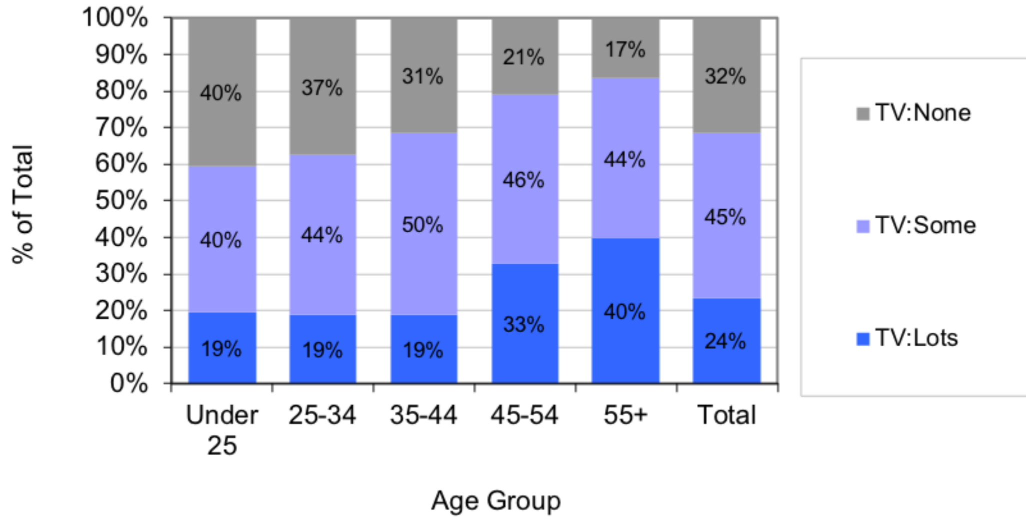


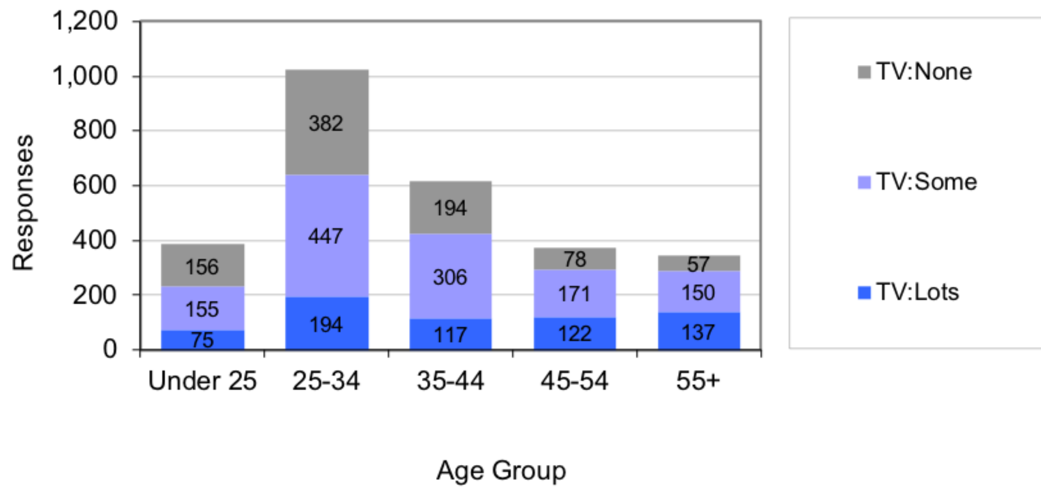
Online: The proportion of respondents who read Online websites a lot is higher for older age groups; all age groups reported reading Online websites sometimes.





TV: The proportion of respondents who Watched TV 'a lot' is significantly higher for older age groups.





SECONDARY SOURCES

TD Vancouver Jazz Festival also polled attendees on 'How They Get Their News'. The framing of their question differs from DoBC's (eliminating streaming services and YouTube most notably), and the average age of their attendees was 48y/o. noting those differences - their results were:

Media / News Discovery	**N = 123**
Online News	31%
Facebook / Twitter	20%
TV	14%
Radio	11%
Print	11%
Other	8%
Other online	5%
	* 47.8% 45y/o or over

3. CONSUMER BEHAVIOUR: SOCIAL MEDIA

SOCIAL MEDIA GRAPHS: USAGE BY AGE & REGION

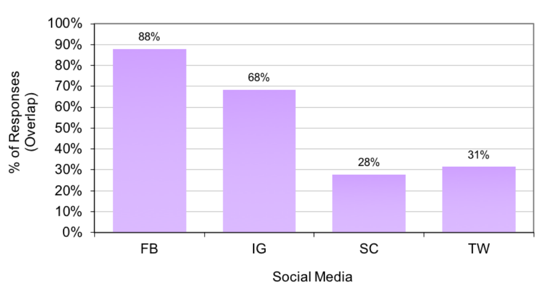
On questions relating to use of Social Media (2,951 responses) Facebook use was pervasive, with Instagram ranking second overall. Because this survey was delivered online and promoted via social media we believe there was an implicit bias favouring social media and Facebook in particular. Nonetheless social media's importance with the consumer is shown here and throughout other responses in the survey.

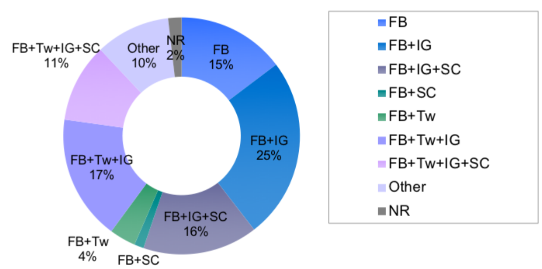
Region x Social:

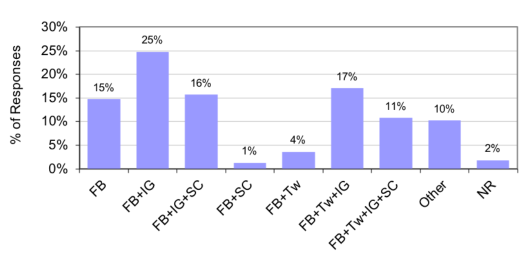
- Facebook has the largest reach in 3 major regions polled btw 36% (Van Subs) - 41% (Island)
- Instagram has second greatest reach between 32% and 36%.
- Snapchat use peaked in the Vancouver Suburbs (16%), driven by youth
- Twitter peak regions are Vancouver and Van Subs (16%)

Age x Social Media:

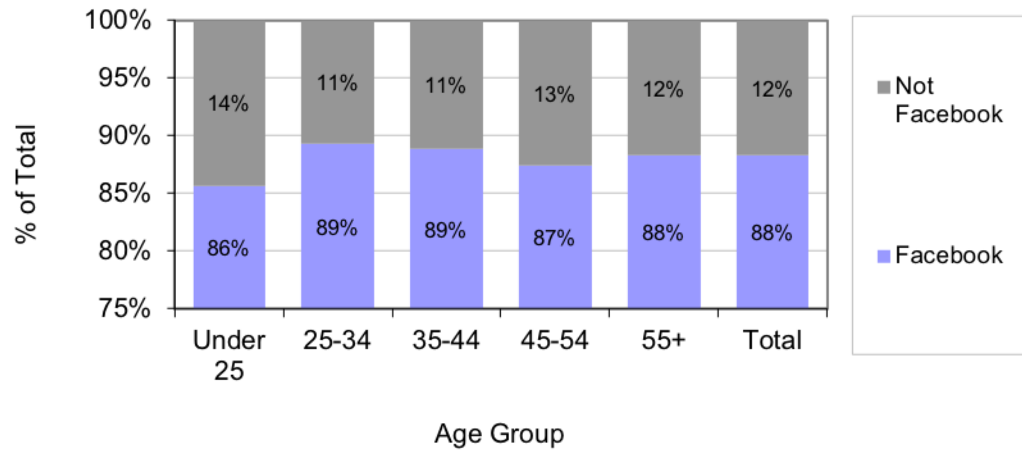
- Facebook usage is 88% across demos, growing slightly with older age groups
- Snapchat usage strongest with youth: 26% <25, dropping to 15% w/ 25-34, 8% w/ 35-44.
- Instagram has strong use across ages, from 94% (under 25) to 60% (45-54) before dropping to 43% for 55+
- Twitter usage is weakest in younger demos (10% for <25), grows to 20% for 55+



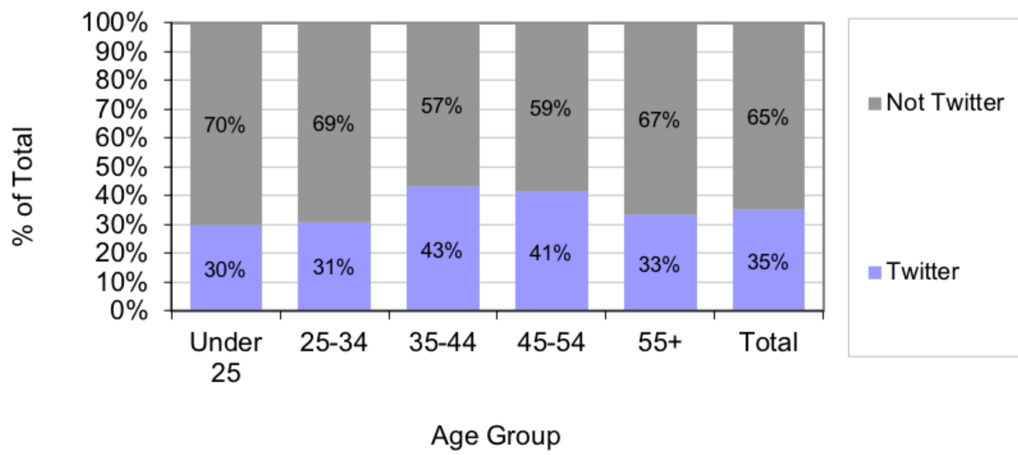




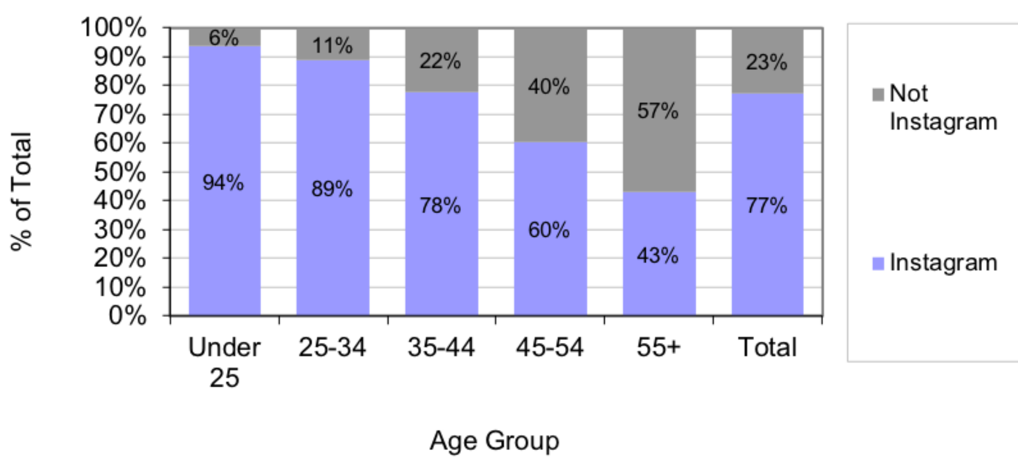
Facebook:



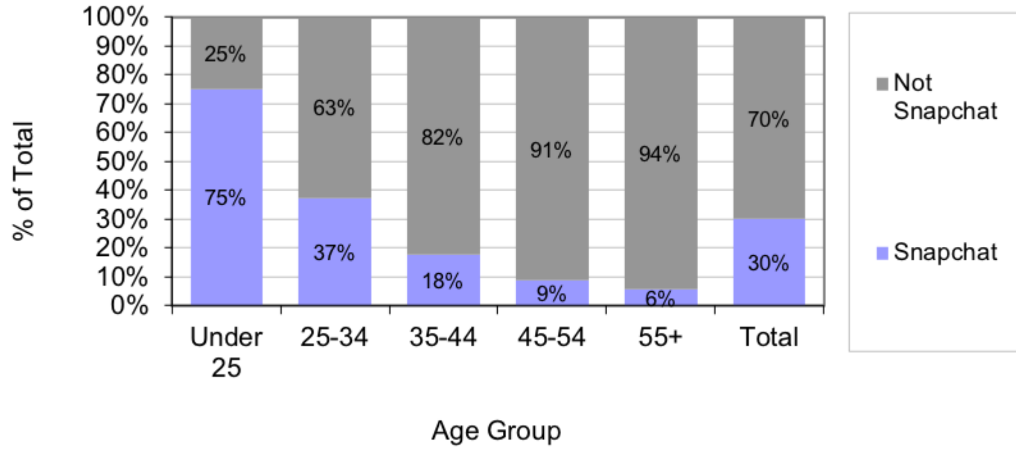
Twitter: use is 35% across demos, with a higher proportion in older age groups



Instagram: 77% of respondents use Instagram, with the highest use coming from younger demos



SnapChat: 30% of respondents use Snapchat, driven by high usage in the youngest age group



Summary notes:

- Digital overtaking traditional media for all demos, this will accelerate as the audience ages (ie: as more highly digital under 25's coming of age)
- Digital, and streaming in particular are responsible for most artist discovery, with the exception of older demos.
- Digital's importance will grow with aging audience.

*SOCIAL MEDIA - SECONDARY SOURCES

Honda Celebration of Light conducted an online survey with EventCorp. Their attendees had an average age of 37 y/o and reported the following Social Media usage:

Social Media	
Facebook	78%
YouTube	58%
Instagram	56%
LinkedIn	35%
SnapChat	29%

4. CONSUMER BEHAVIOUR: ARTIST DISCOVERY

Approaching the question of Artist discovery (music) the survey asked respondents how they had discovered the last new artist they had been introduced to. Following the media use responses and high instance of streaming music with BC consumers it was not surprising to see 'Streaming Services' reported as the top means to artist discovery in BC, followed by 'Word of Mouth' and online media.

'Word of Mouth' can be shared in many ways, and with the wide use of digital and social media we would like to take a more focused look at the role of social media within artist and event discovery in the future.

Artist Discovery (Region)

- Streaming services reported as top means of Artist Discovery across regions: 51%
- Word of Mouth (43%) & online media (38%) were next most reported means of discovery across BC
- Radio ranked 4th (29%) in artist discovery overall, with stronger showings (+7%) on Vancouver Island + Vancouver Suburbs than in Vancouver.

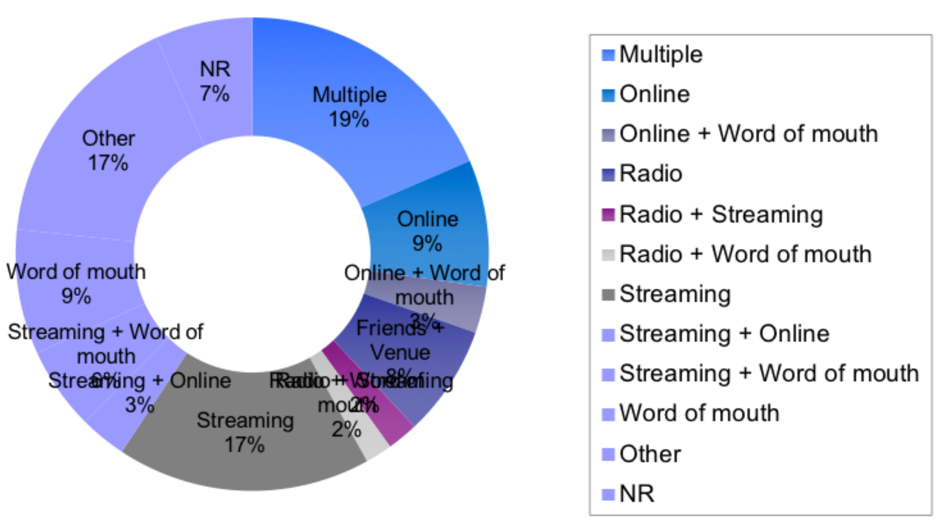
Artist Discovery (Age)

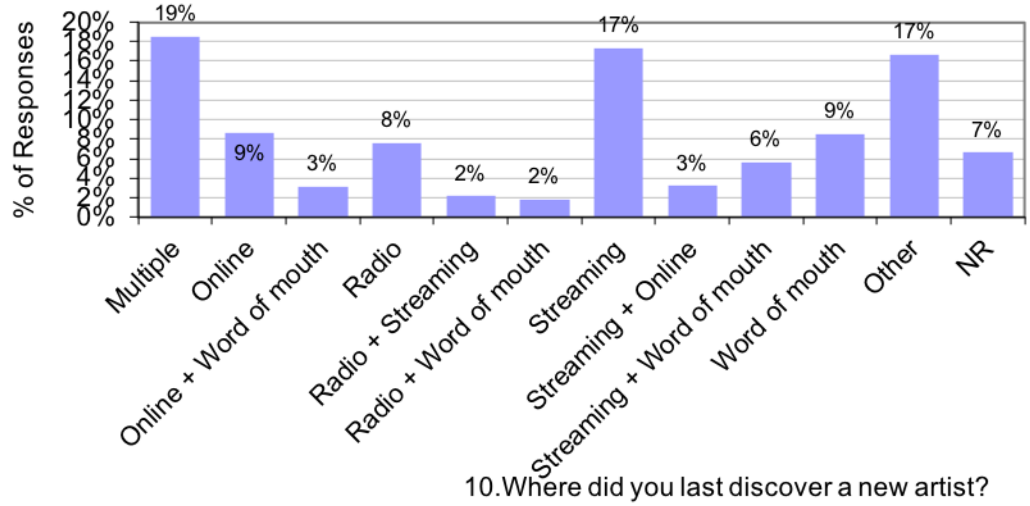
- Streaming services are the top source of new artist discovery for consumers 44 y/o and under
- Word of Mouth is the second ranked source of discovery with 34 y/o and under followed by online media
- Radio remains the top source of artist discovery in BC for consumers 45 y/o and over.

Artist Discovery (Gender)

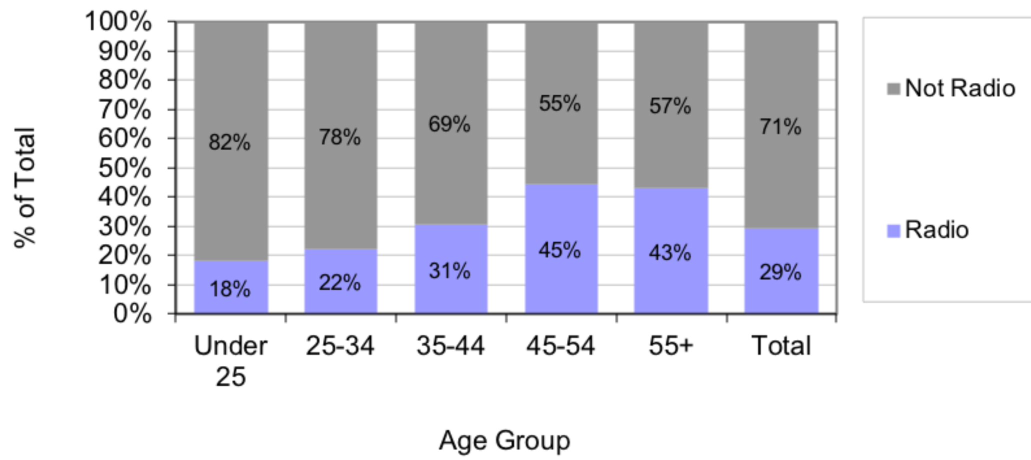
- Artist Discovery split by gender was very similar, with small variations recorded in discovery by Online Media and discovery via radio
- Females reported a higher use (vs. males) of Radio in overall media use

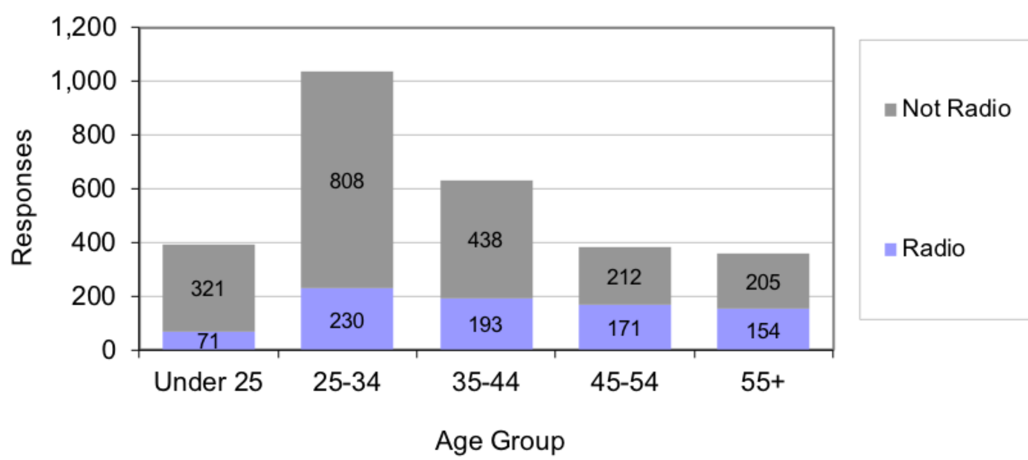
Frequency	Responses	% of Responses
Multiple	557	19%
Online	260	9%
Online + Word of mouth	95	3%
Radio	228	8%
Radio + Streaming	64	2%
Radio + Word of mouth	55	2%
Streaming	521	17%
Streaming + Online	96	3%
Streaming + Word of mouth	170	6%
Word of mouth	256	9%
Other	501	17%
NR	199	7%
Total	**3,002**	100%



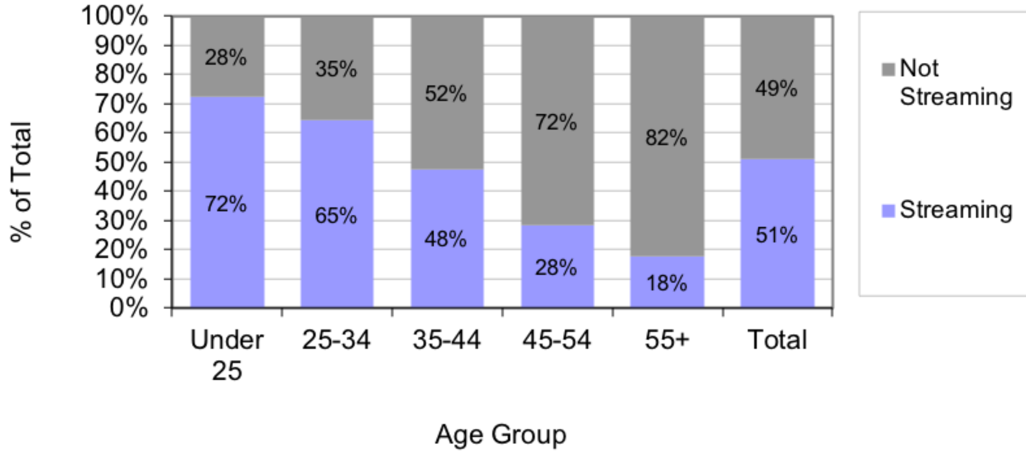


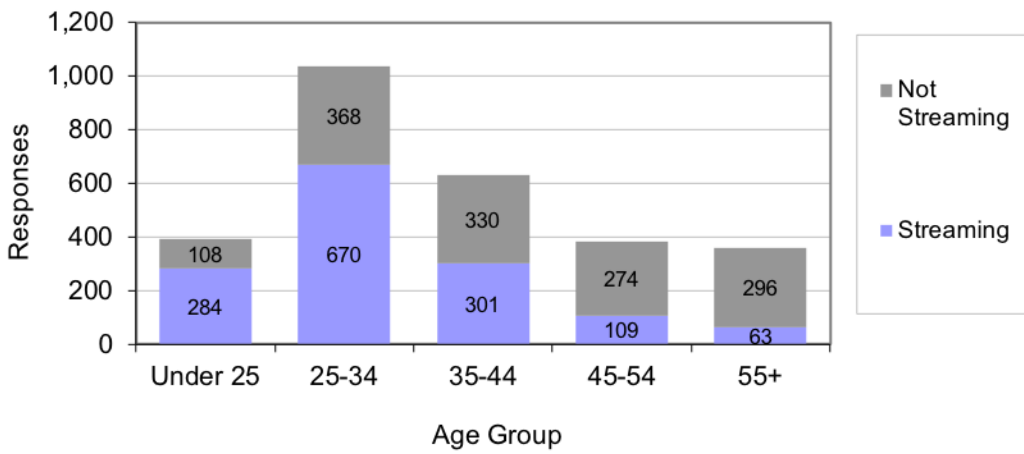
Radio: Discovering new artists via radio is much more frequent with respondents >45 years old.



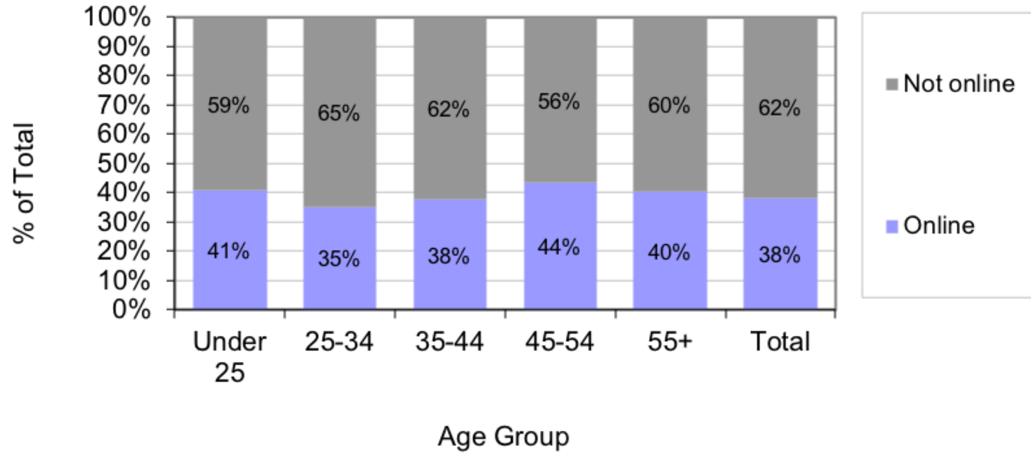


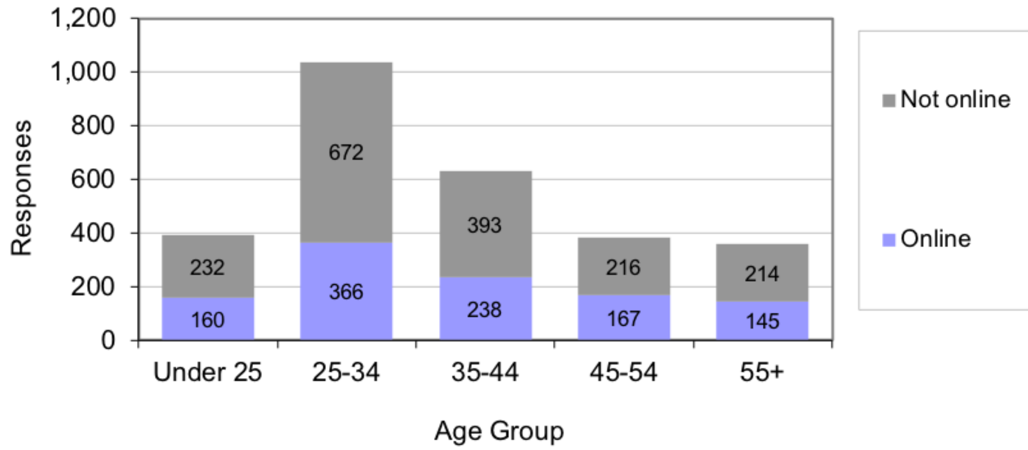
Streaming: Discovering new artists based on streaming is much higher for younger age groups: under 25 report 72% discovery via streaming, 4x the rate reported by 55+ (18%)



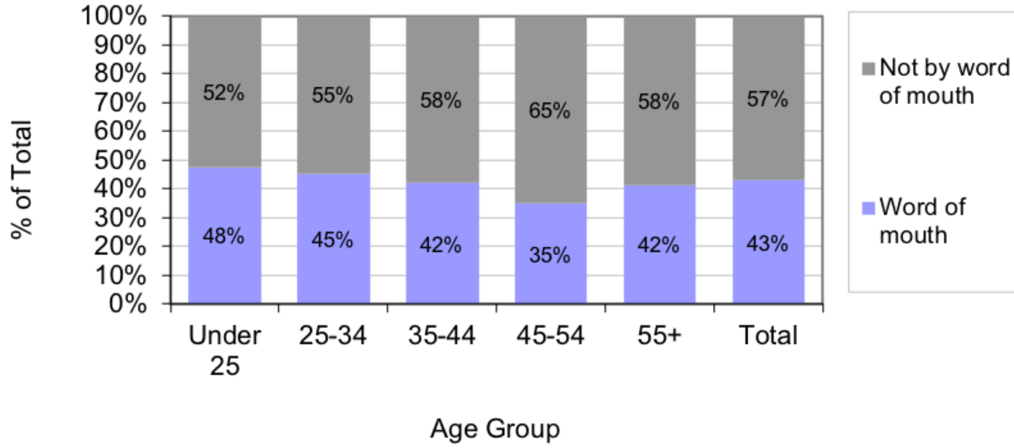


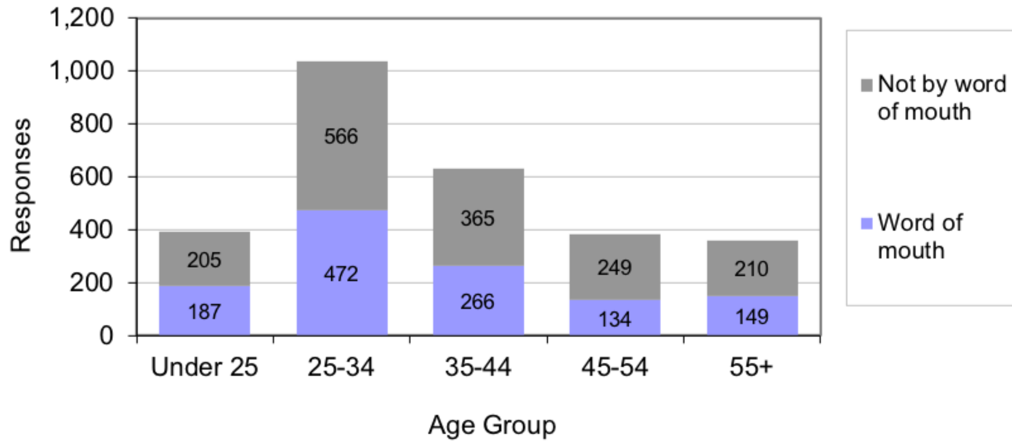
Online Media: Discovering new artists based Online media does not change significantly by age group





Word of Mouth: Discovering new artists based on word of mouth is relatively uniform, but somewhat lower for the age group of 45 to 54





5. CONSUMER BEHAVIOUR: EVENT DISCOVERY

Responses to the question of their top 3 sources for event info in BC; DoBC split the question into music and non-music events in an effort to find differences in discovery by event type. Across all regions and demographics social and digital media were reported as the most influential media for event discovery.

Event Discovery:

Respondents were asked to report on their top 3 sources for info on events in BC

- Social Media was reported as the top source for info on events, chosen in 87% of responses
- Word of Mouth followed with 71%, Online search with 50%, Music Outlets with 37%, & Radio with 29%
- When asked the same question about music events specifically Word-of-mouth and online sources received equal scores of 62%

Music Event Discovery:

- Vancouver (Subs and Downtown) rated Social Media, Online and Word of Mouth as the top 3 means of event discovery, Vancouver Island rated Social Media, Word of Mouth and Online as top 3
- Discovery via Word of Mouth and Social Media peaks with younger demos
- Traditional Media (Print and Radio) discovery increased with older demos, peaking at 14% (print) and 12% (Radio) for the 55+ demo.
- Print performed significantly better than radio across all demos, except with 45-54 y/o demo: where Print narrowly surpassed Radio as a means to event discovery (12% v 11%)

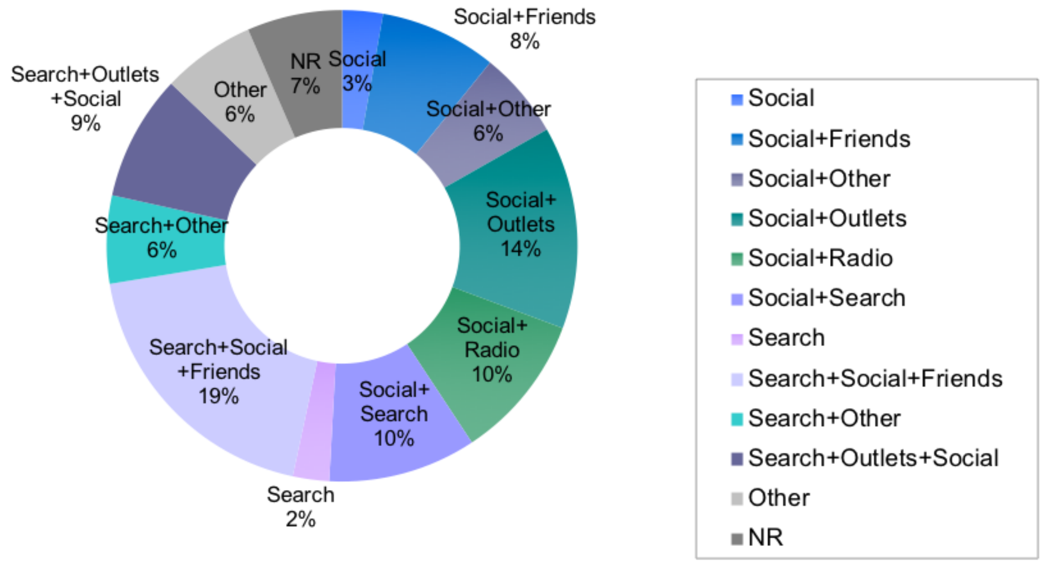
***Event Discovery x Region and Age:**

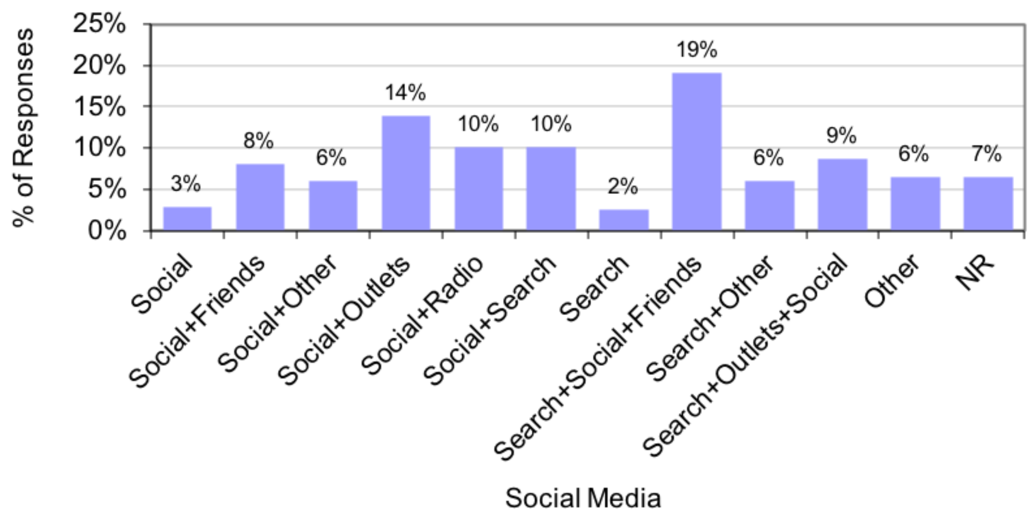
- Vancouver Island reported the highest instance of event discovery via radio
- Looking at overall event discovery x Age, Social Media, Word of Mouth and Online were the top 3 sources across all age ranges

How do you learn about events?

Frequency	Responses	% of Responses
Social	84	3%
Social+Friends	241	8%
Social+Other	179	6%
Social+Outlets	417	14%
Social+Radio	301	10%
Social+Search	305	10%
Search	75	2%
Search+Social+Friends	572	19%
Search+Other	181	6%
Search+Outlets+Social	259	9%
Other	192	6%
NR	196	7%
Total	**3,002**	**100%**

Frequency	Responses	% of Responses
Social	2,358	79%
Search	1,392	46%
Friends	813	27%
Outlets	676	23%





SUMMARY NOTES

- Word of mouth's importance is substantial, but can be registered via social media & digital means (ie: friends posting about a new artist discovery)
- Successful media campaigns must adopt a social media component, even when targeting older consumers
- Traditional media importance in certain regions and with major events holds (ie: Vancouver Island, Free events like Honda Celebration of Lights, etc.
- Word of Mouth was reported as a more important factor for non-music events (71%) than concerts (62%)

- Online was reported as a more frequent source of info on music events vs non-music events (61% vs 50%)
- Traditional media (Print / Radio) had lower scores for event discovery, with radio showing +3% responses for music event discovery vs other events, and print showing +3% responses for non-music events.

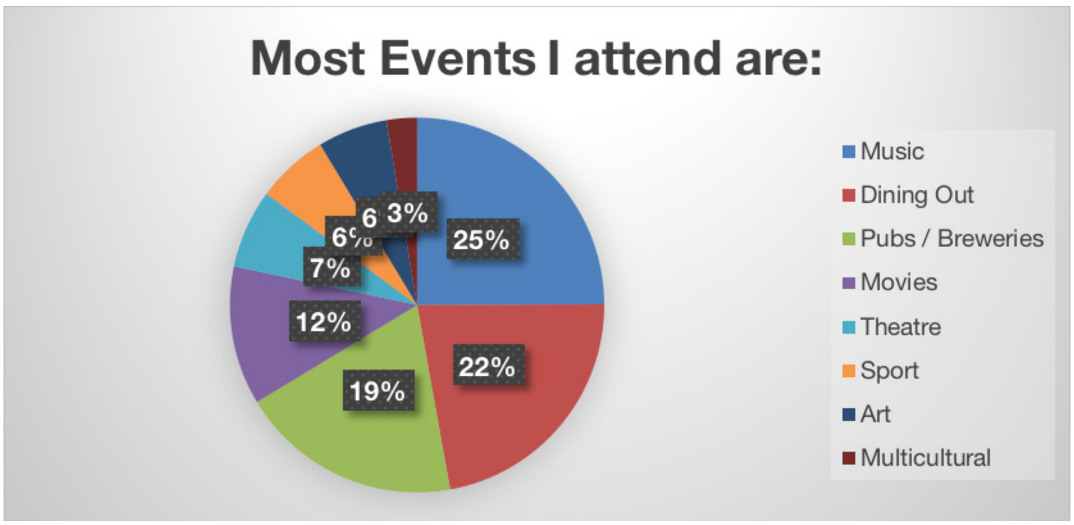
*SECONDARY SOURCES

- Honda Celebration of Light 'Sources of Awareness': asking HCOL attendees about their sources of awareness; Word of Mouth led all responses (46%), followed by 'Online' (36%) and Social Media (26%).
- HCOL's attendees in 2018 were 37 years on average, and the event has been taking place annually in Vancouver for 28 years. The events' longevity would be considered a factor in it's strong scores in 'word of mouth'

HCOL Media Discovery

Media/Channel	Responses
Word of Mouth	46%
Online	36%
Social Media	26%
Radio	24%
Print	22%
TV	19%
Other	16%
App	9%

6. MARKET RESEARCH: ENGAGEMENT WITH MUSIC VS OTHER CATEGORIES | CONCERTS VS OTHER CATEGORIES



Our survey asked consumers to identify what type of outings or events they normally took part in (Pick 3). Separately we asked how many times they had been out in the past month, consumers age and region.

By combining the responses on outing / event types, frequency, region, age and gender we discovered the following:

EVENT Categories x Frequency:

- Dining ranked #1 as an outing type for consumers who went out once a month (25%) vs music (22%)
- Music ranked as the top event / outing category for consumers who went out more than once a month
- Dining, Pubs, and Movies ranked 2nd-4th in event types for consumers going out more than once a month

EVENT Categories x Age:

In response to what 3 types of events they attended most frequently. Music was consistently #1, ‘Pubs’ declined as age increased.

- Music consistently ranks #1 with ~25% of respondents in each age group
- ‘Dining out’ consistently ranked #2 with 22% of responses across all demos
- ‘Pubs’ ranked 3rd across all age ranges, with 22% of consumers under 34 y/o, but declined with 35-44 (19%), 45-54 (15%) and 55+ (13%)
- Movies ranked 4th generally across all ages with rankings from 12-14%
- Music and Dining with the steadiest overall scores across age demos

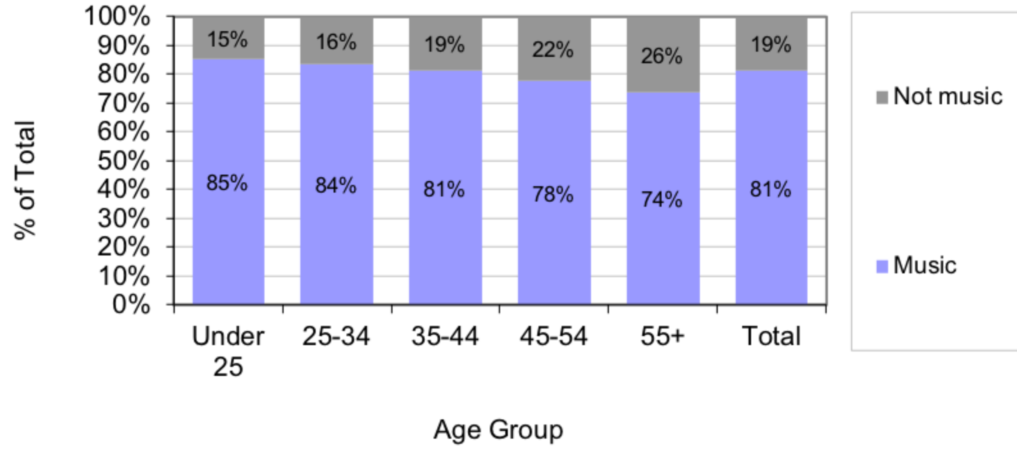
EVENT Categories x Region:

- Music ranked #1 across categories in all regions with 26% (Vancouver Island) 25% (Vancouver) and 24% Vancouver Suburbs responses.
- Dining, Pubs and Movies round out the Top 4 rankings across regions
- Sport had lower responses between 5-7% peaking in Vancouver Suburbs with 7%.
- Vancouver had the biggest gap btw music and dining (Music +3.5%)
- Vancouver Island had highest freq of PUBS (20.7% vs 18.7 / 18.3%)
- Highest Music score found on Vancouver Island (25.7%)
- Vancouver Subs had smallest difference btw music and dining (.3%)

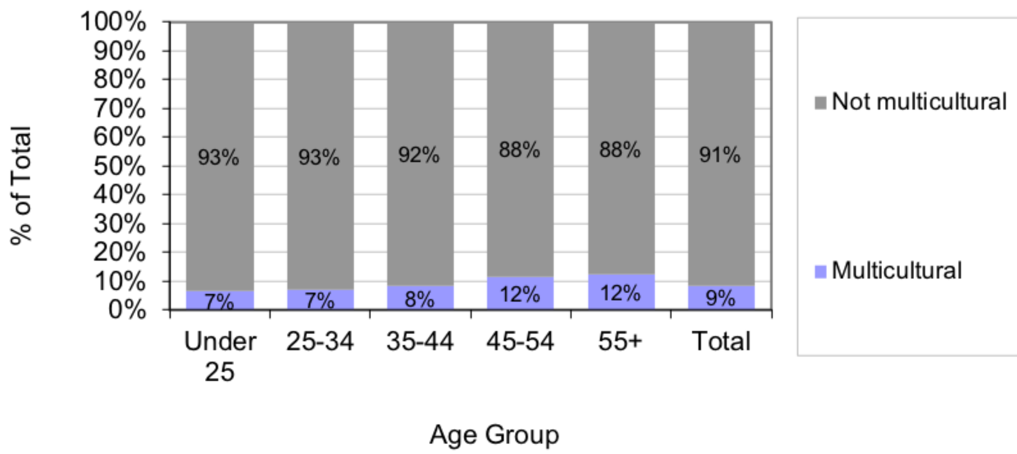
EVENT Categories x Gender:

- Popularity of event types is very similar divided by gender with Music ranking #1, followed by Dining, Pubs, and movies.
- Sport indexes higher amongst males (ranked 5th) whereas for females Theatre and Art outrank Sport.

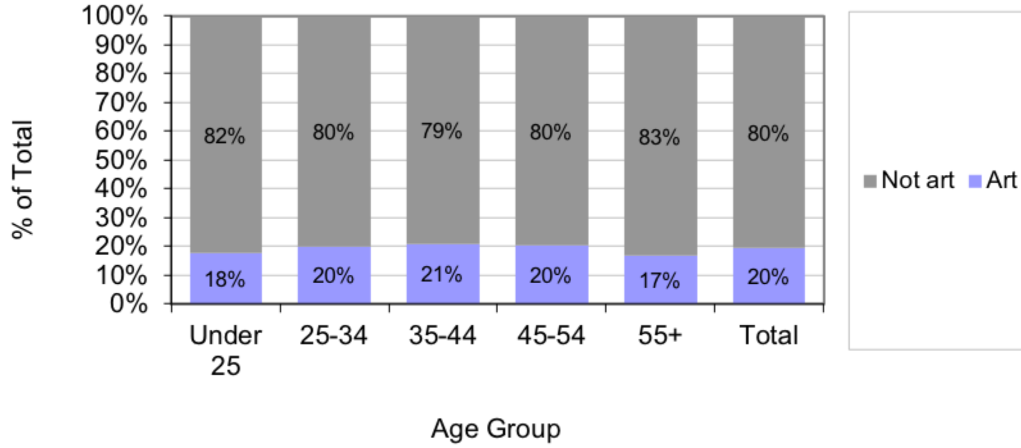
Event Categories: Music:
The proportion of respondents that go out for music is slightly in younger age groups

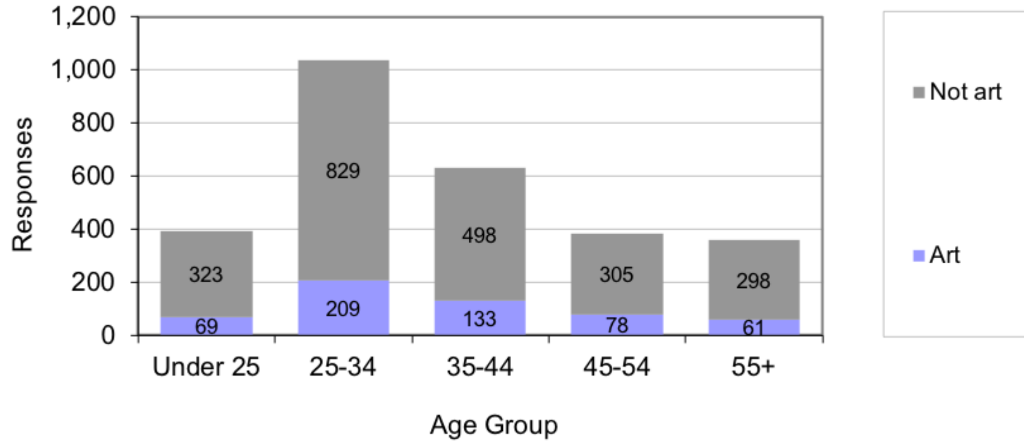


Event Categories: Multicultural:
The proportion of respondents that go out to multicultural events is slightly higher in older age groupshigher in younger age groups

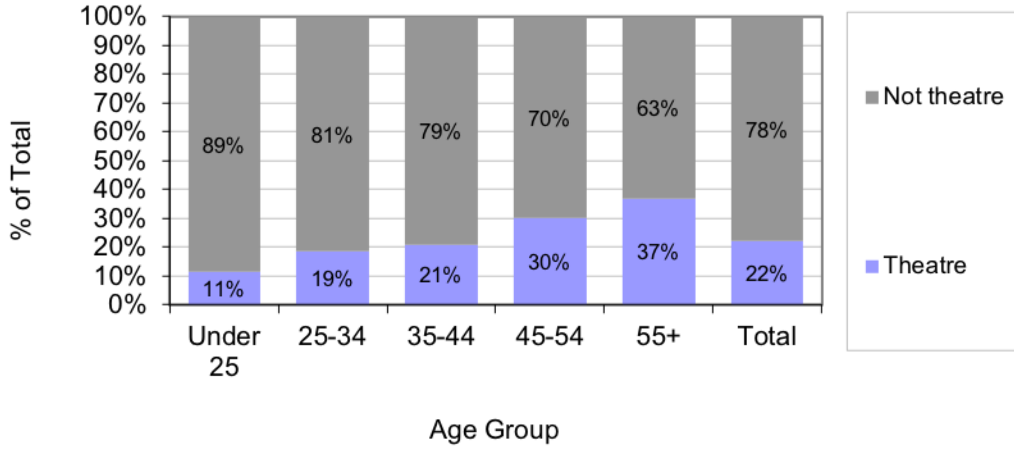


Event Categories: Art:
20% of respondents attend art events, and the proportion doesn't change remarkably by age group

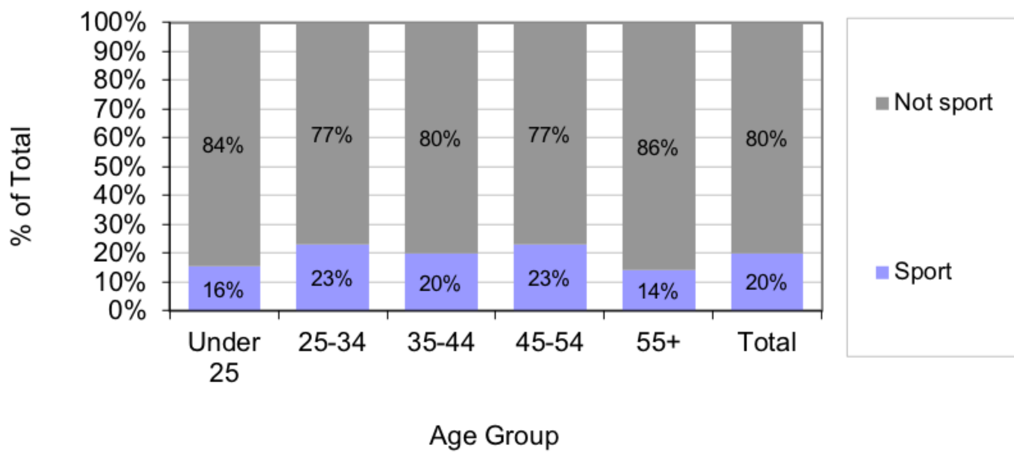




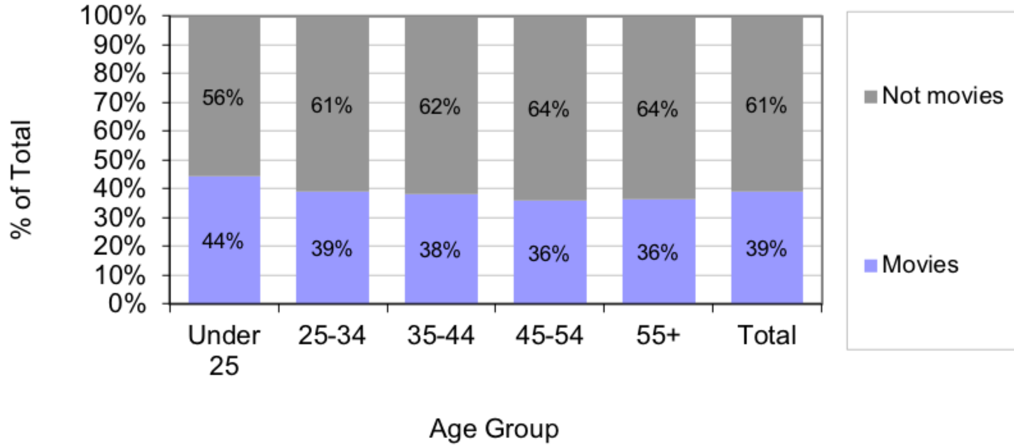
Event Categories: Theatre:
There is a significant increase in attendance in theatre amongst older demos.



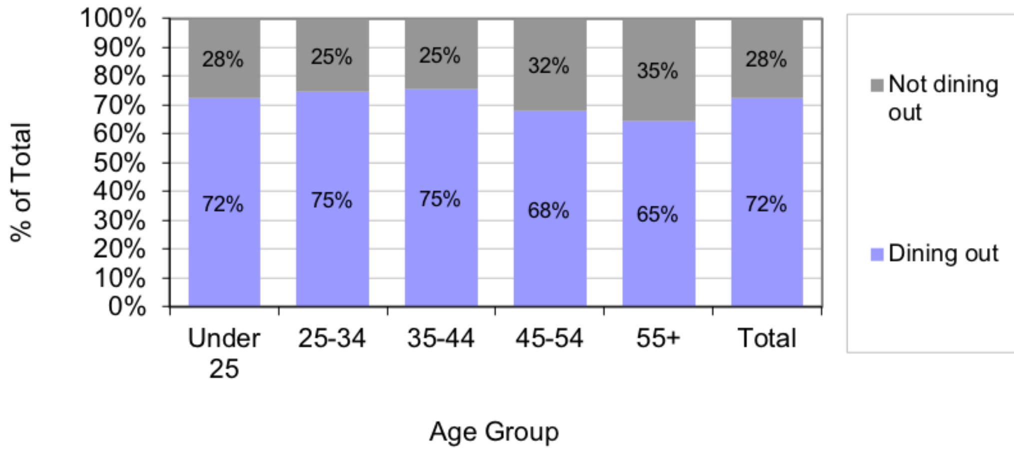
Event Categories: Sport:
20% of respondents attend sport events, and the proportion is lower for the “Under 25” and “55 and over” age groups.

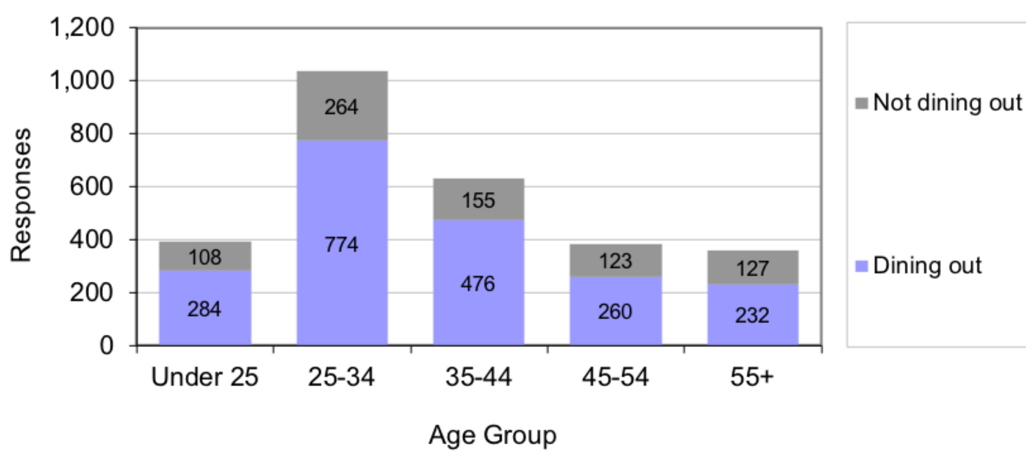


Event Categories: Movies:
39% of respondents attend movies, and the proportion is higher for the "Under 25" age group.



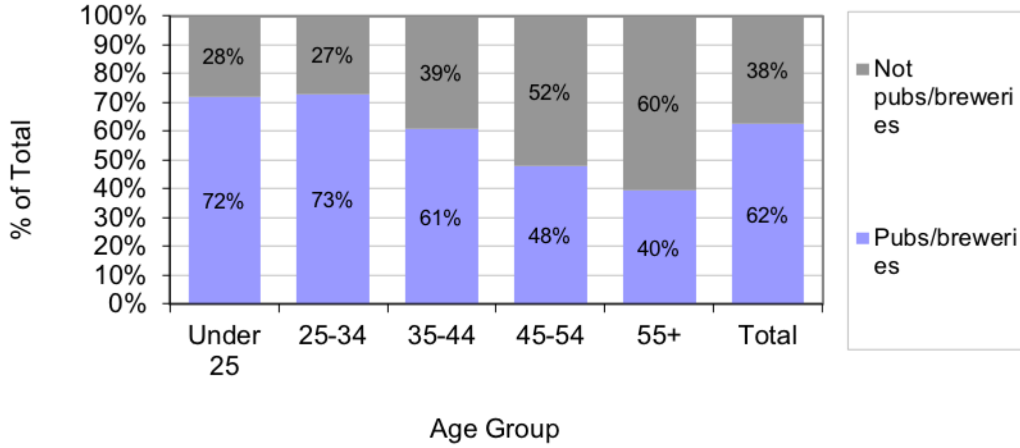
Event Categories: Dining Out
72% of respondents indicated "dining out", with a lower proportion for the "45 and over" age groups.

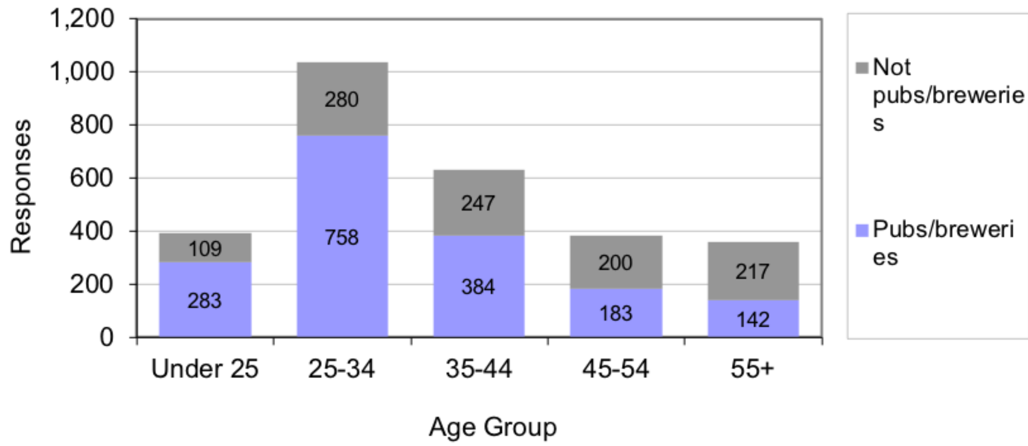


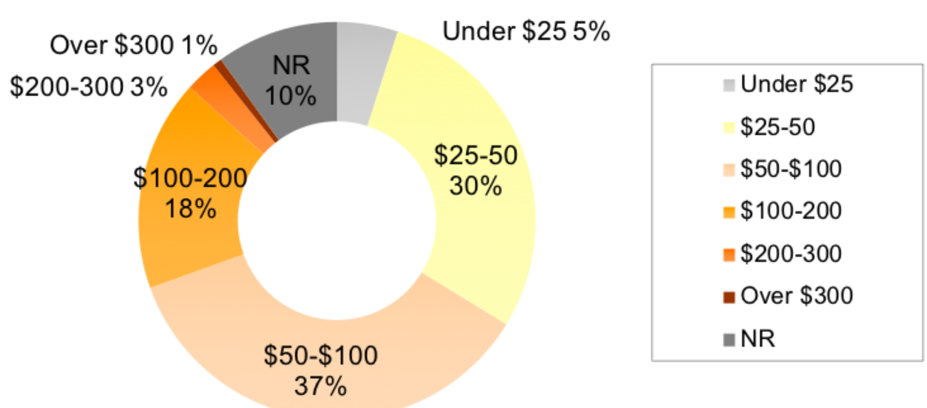


Event Categories: Pubs

The proportion of respondents who go to pubs/breweries is significantly higher for younger age groups.







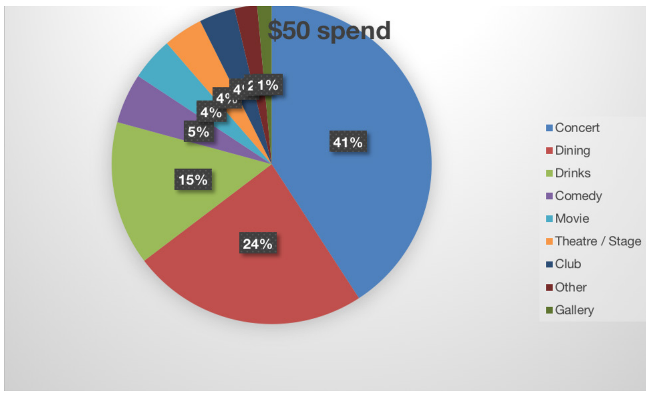
SUMMARY NOTES

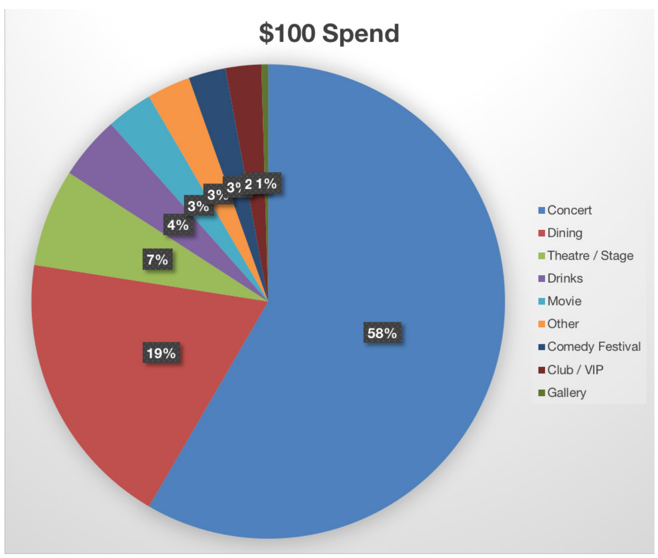
- Music is clearly the top entertainment choice amongst those who go out more than once a month, eclipsing dining out and pubs across all regions, demos and age.
- Regionally Vancouver Island had the highest reporting on music events (25.7%)

7. ECONOMIC IMPACT

Delving into economic impact the DoBC survey asked consumers what type of entertainment / night out they would with a budget of $50 or $100. The goal was to develop insight into how consumers value, or rank music against other forms of entertainment.

SPEND by category

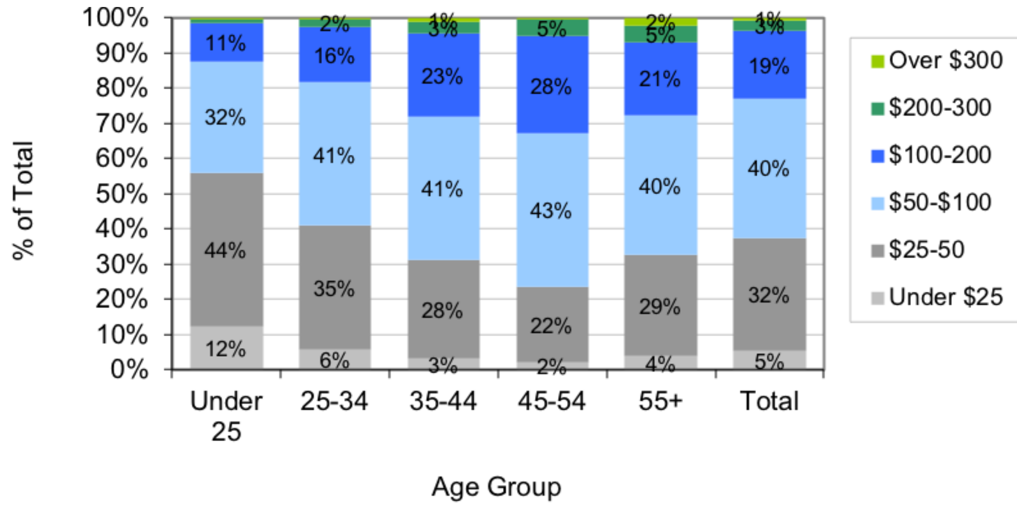


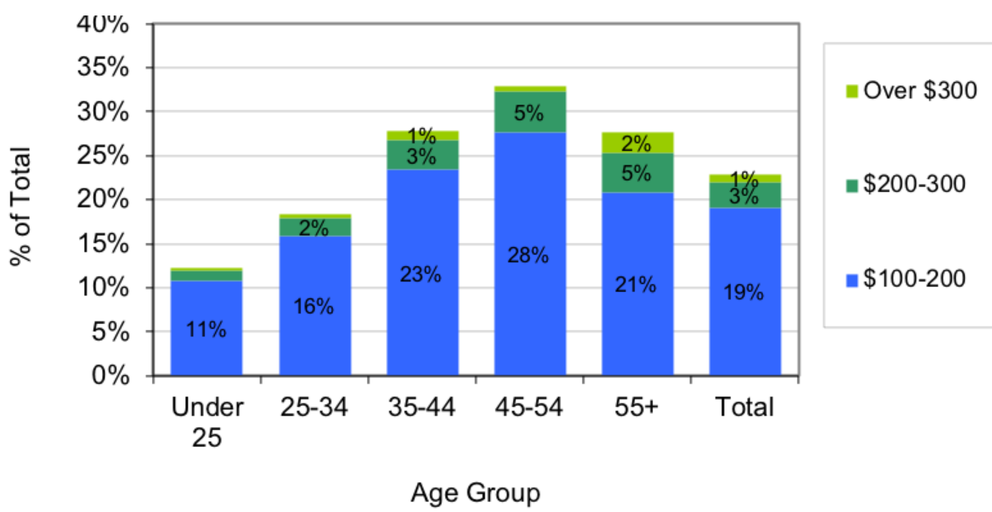


- With a $50 budget Music (concerts) is the top entertainment choice across egions and is especially
- strong in Vancouver with twice as many consumers choosing music over the next category (dining) and over 3x the #3 ranked 'drinks'.
- With a $100 budget the responses favour music (concert / festival) even more strongly across all regions

SPEND by Age:

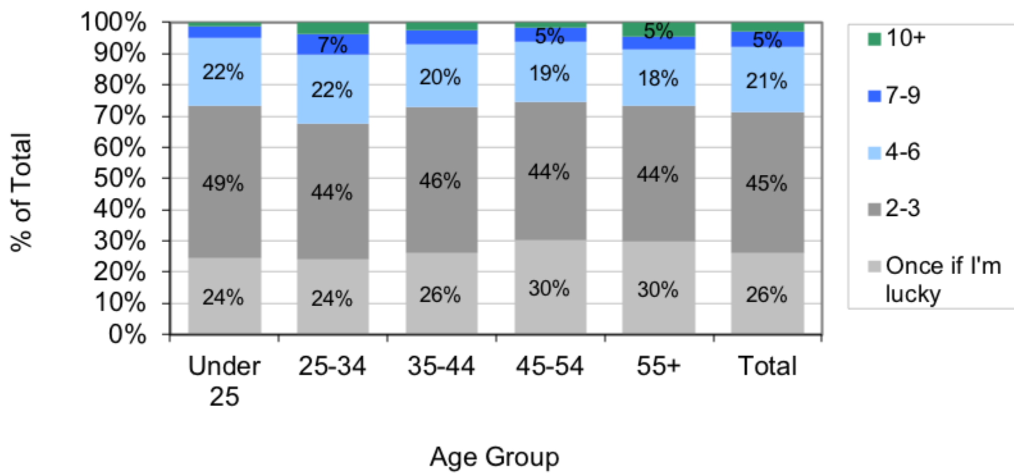
- With a $50 budget all age ranges selected concerts as their top entertainment choices, with 25-34 reporting the strongest affinity for music

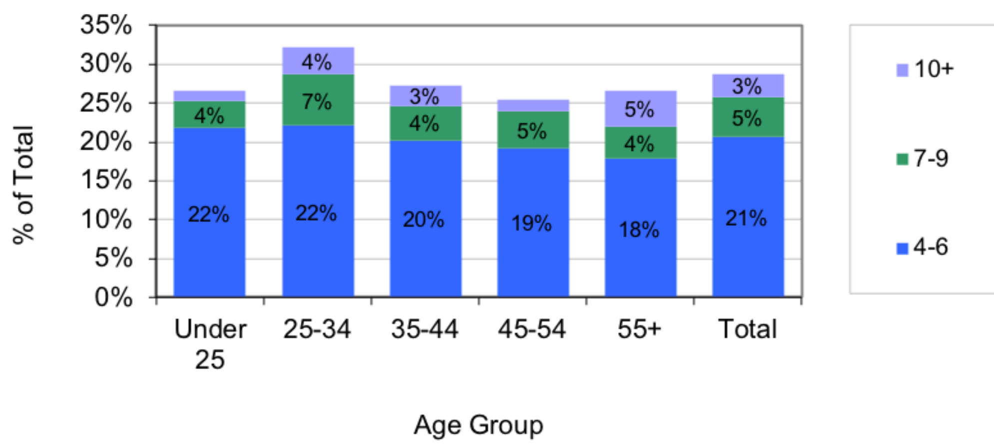




Average Spend by event type:

- Sorting survey responses for ‘event types’ by average spend, we see Music ranked #1 for all spending ranges indicating consumers are more likely to spend at a music event than any other category.
- Splitting Region x Average ticket price: Vancouver reports higher average ticket prices (>$30) and Vancouver Subs reports highest instance of a >$50 average price (17%)
- Vancouver Island reports the highest instance of $15-30 tickets (38%)
- How Often Respondents go out: The 25 to 34 year age group has the highest proportion of respondents who go out 4 or more times a month



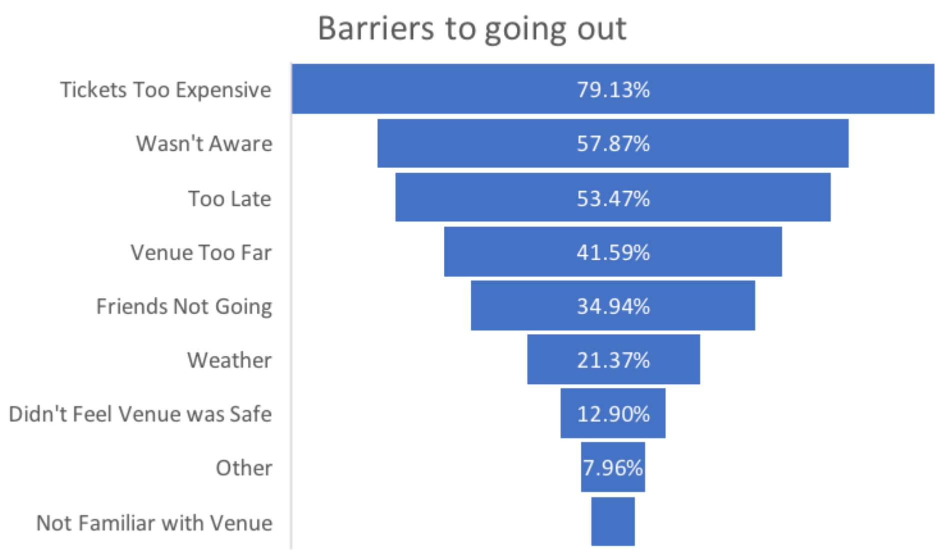


SUMMARY

- Average spend over $100 increases with age to 54 y/o then drops
- Males have a higher likelihood of spending >$100/night
- Music regularly ranks #1 across all spending levels.
- Sport increases with average personal spend.
- ‘Going for Drinks’ decrease w/ average personal spend
- ‘Going Dining’ increases with personal spend

8. BARRIERS

In looking at barriers to attending more events, DoBC asked consumers to pick 'all that apply' from 8 pre-selected answers + one write in response. Survey responses are outlined below and a word cloud of the write in responses (7.96% of 2,813 responses) can also be found below:



Region x Barriers:

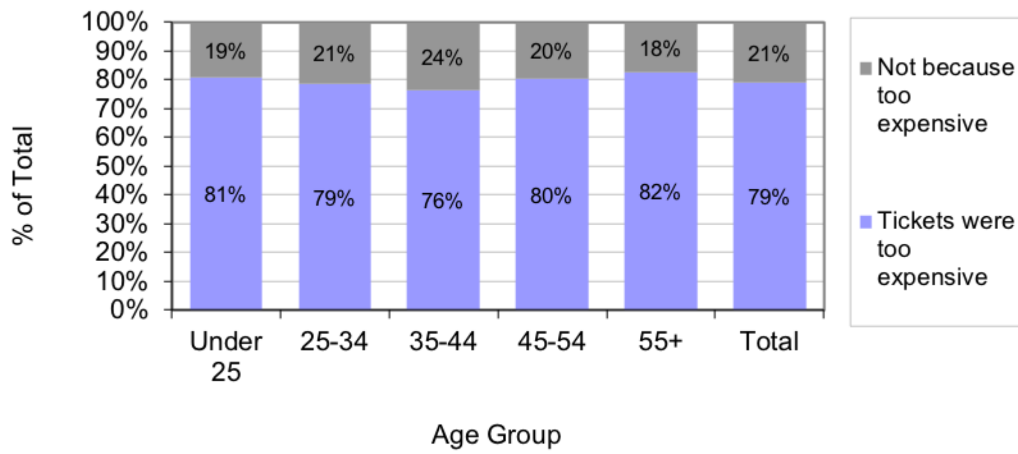
Barriers to going out were fairly uniform across regions with a few variances:

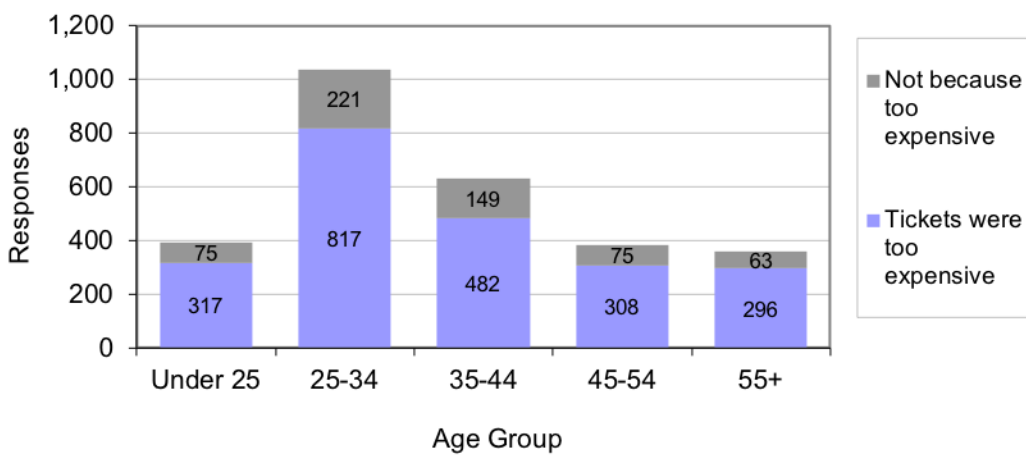
- The Top 4 reasons for not going out in the three major regions are:
  Too expensive, Not Aware, (Show/Event was) too late, and 'Friends not going'
- 'Tickets were Too Expensive' was consistently reported across all BC regions
- Awareness (lack thereof) was a slightly greater factor on the Island vs Vancouver or suburbs.
- Shows starting late was a greater concern on the Island than in Vancouver or the suburbs
- 'Friends not going' was cited as a reason for not going out 11% of the time across all regions.

Age x Barriers:

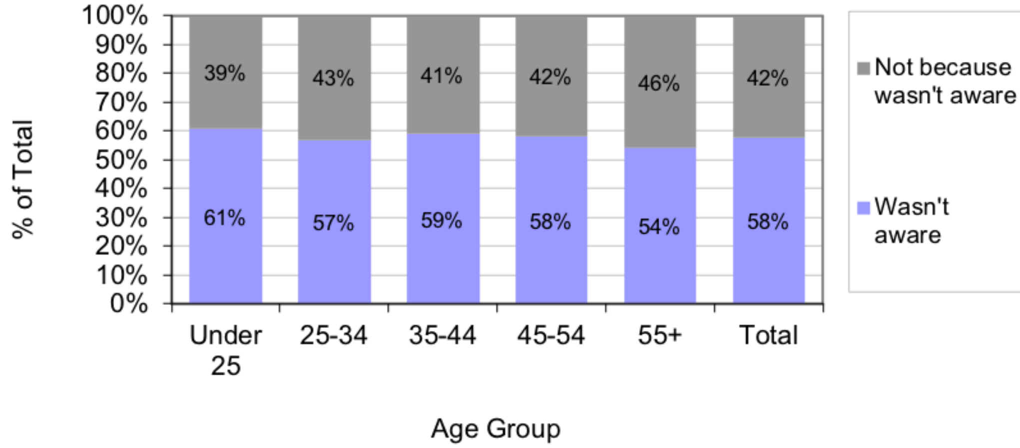
- Price was the top barrier across age demos, peaking at 82% with 55+
- Awareness is the second most reported barrier accounting for 61% of under 25's 'reasons for not going out' and 54% of 55+.
- 'Friends not going' was ranked 3rd in reasons for not going out, and was a greater factor for younger (57% for <25) than older demos (16% for 55+)
- Shows being too late was reported as the 4th ranked barrier to going out, peaking at 19% for 35-44 and 45-54

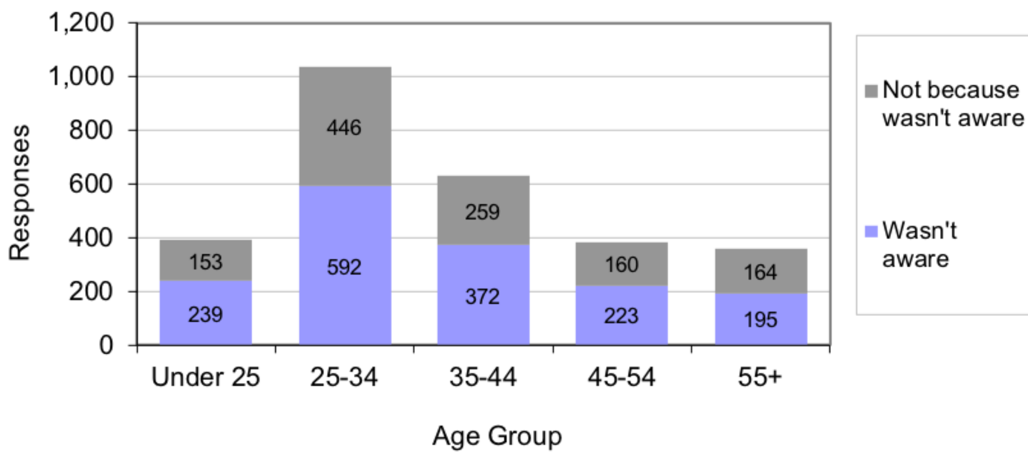
Too Expensive: "Tickets were too expensive" is a major reason for respondents not going out (79% overall)



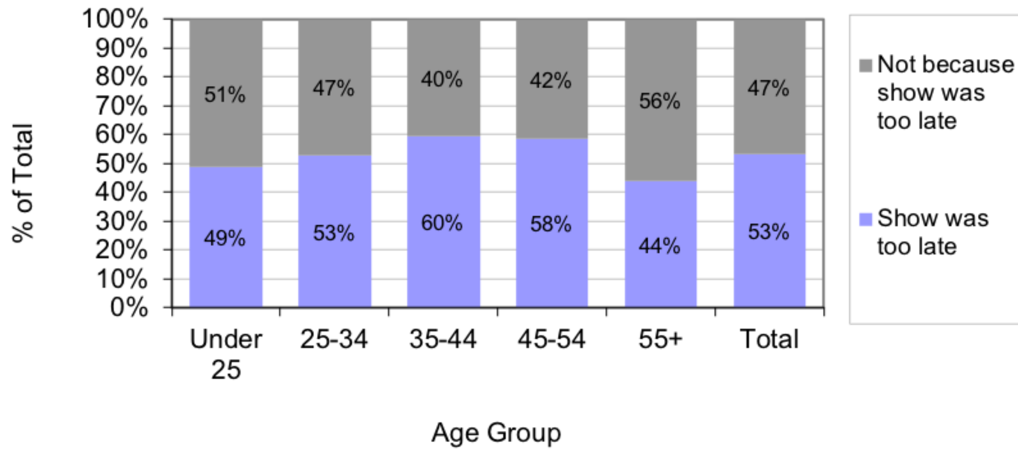


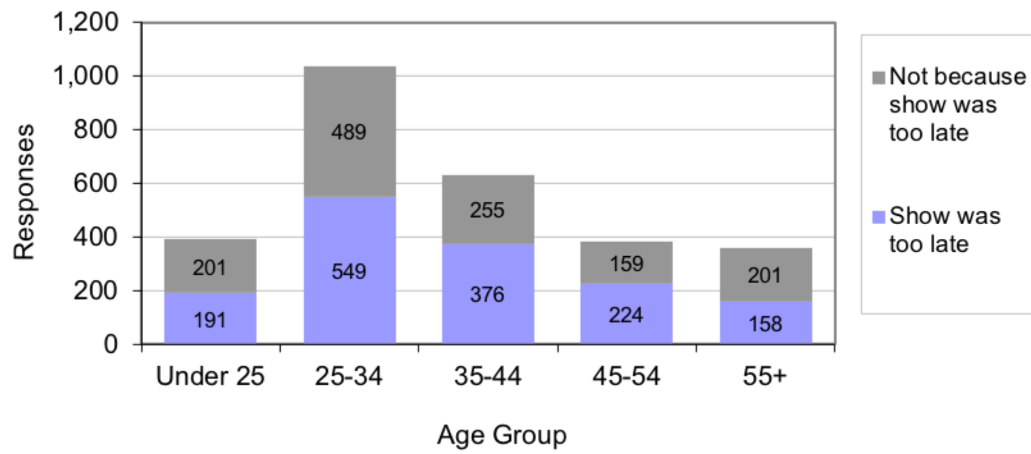
Awareness: Not being aware of events is a significant factor keeping consumers from going out more across all age groups



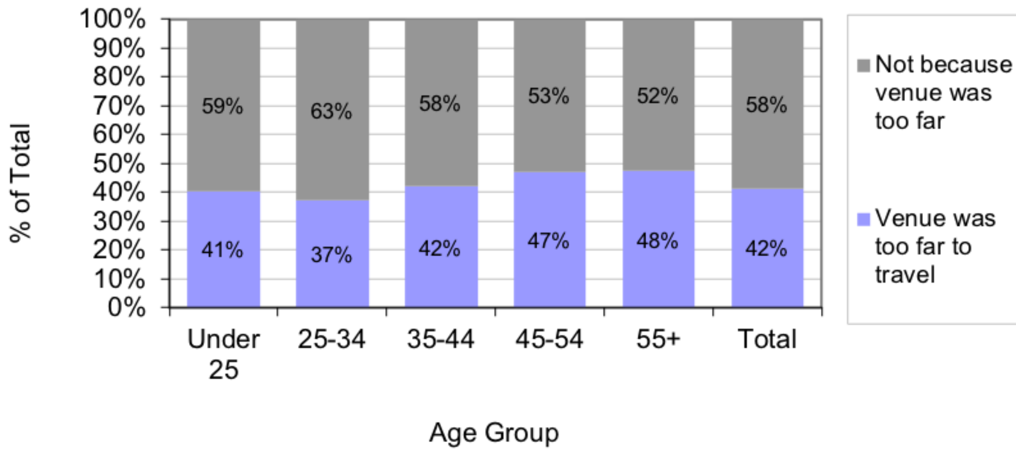


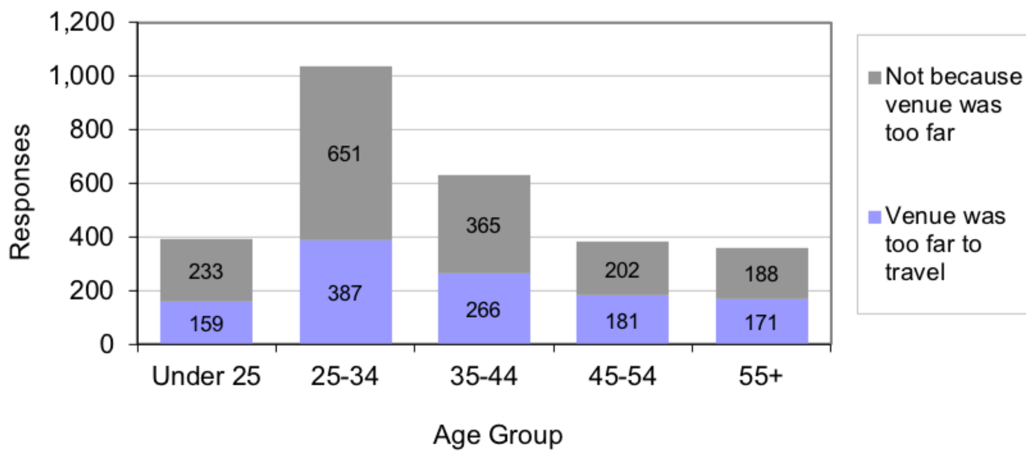
Too Late: "Show was too late/weeknight" was higher for respondents aged 35 to 54



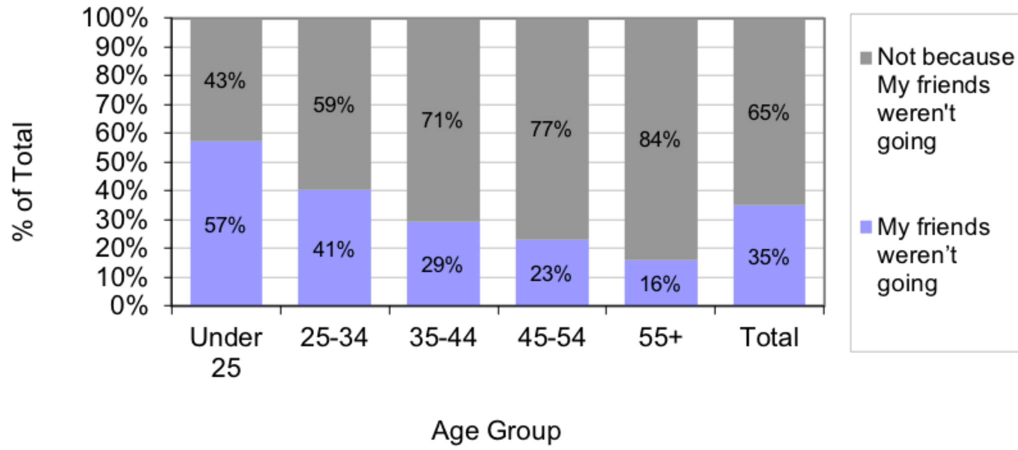


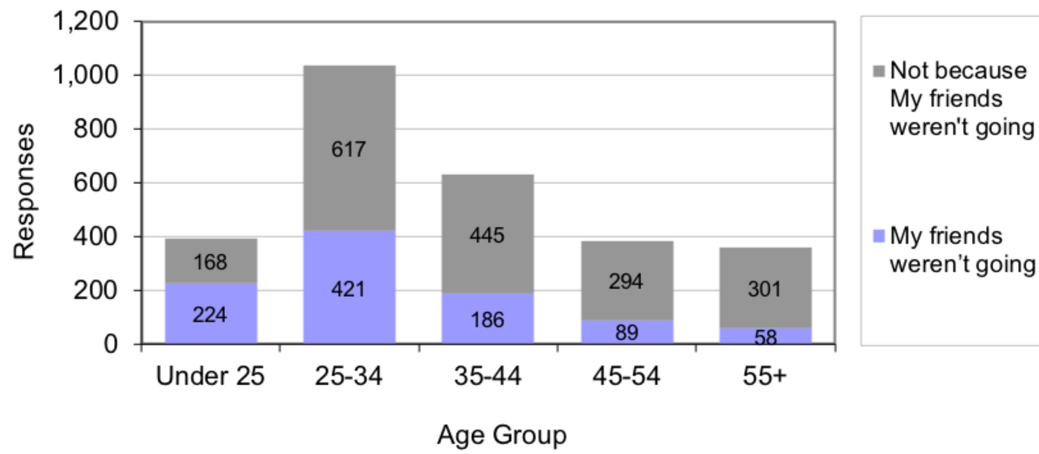
Too Far: "Venue was too far" was higher for respondents aged 45 and above





Friends Weren't Going: "Friends weren't going" is a major reason for younger respondents not going out

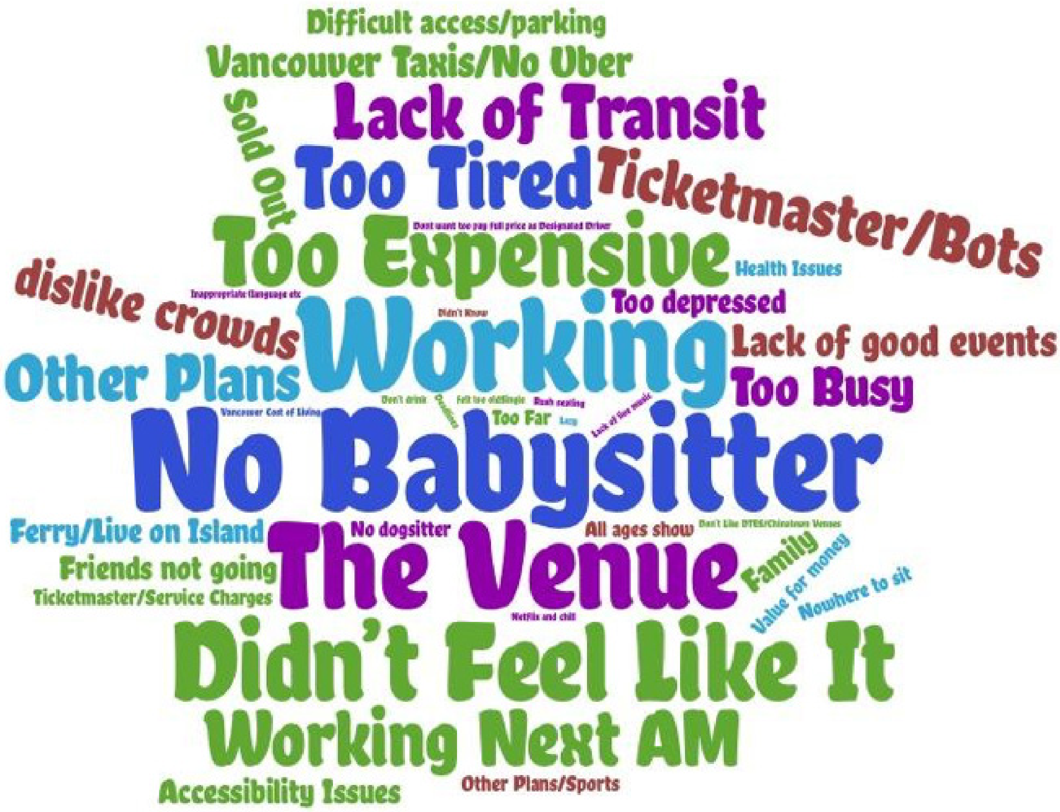




Barriers to going out: Write-in Responses:

The following word cloud was created from the write-in responses to the 'Barriers' question. Answers were cleaned and organized to create this visualization, the original write in answers can be found in the survey data in the appendices.

In the write-in responses we see variations of 'working' or 'other plans' and 'family/no babysitter' as the primary reasons for not going out. We also observe consumers separating 'ticket prices' and 'service charges' as separate issues. Access, transit, and taxi's (or lack of Uber) were also frequent reasons given for consumers not going out more – with several Vancouver Island residents indicating they would attend more shows on the mainland with more flexible ferry options.



9. SOCIAL ACTIVITY BEHAVIOURS & INDEX: WHAT PEOPLE ARE LOOKING FOR

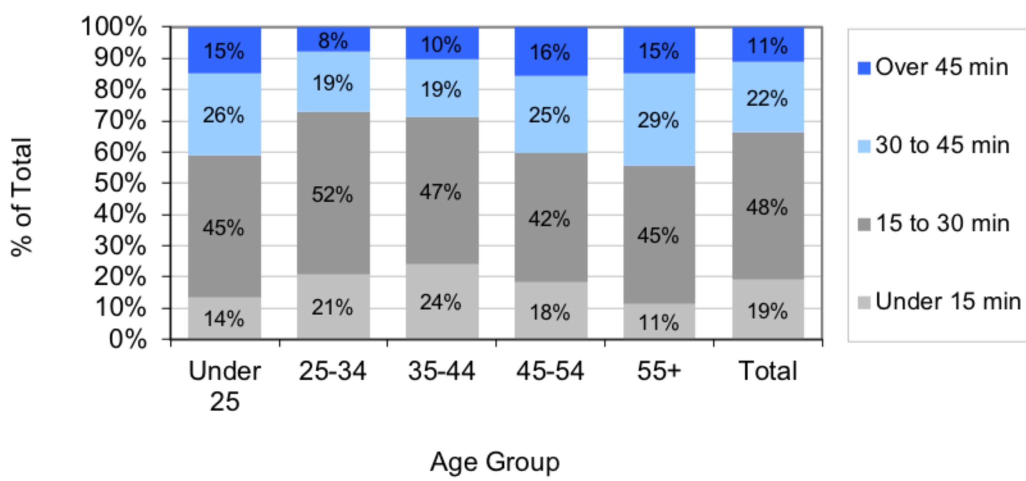
Throughout the survey, consumers shared that 'going out' was a social function, from discovery of events (Social Media and Word of Mouth as top sources of discovery) through to reporting that 'Friends Not Going' was a major barrier to consumers going out themselves.

While we see the importance of 'friends' declining slightly with age (as a barrier to going out), even upper demos are reporting a high social value to their activities.

Consumers travelling to events: (Region x time traveled to events):

Vancouver:	79% travel under 30min to venues
Island:	80% travel 30 or less
Subs:	65% over 30 min of travel

How Far Respondents Travel: 70% respondents of the 25 to 44 age group travels 30 min or less when they go out. This number is less than 60% for other age groups

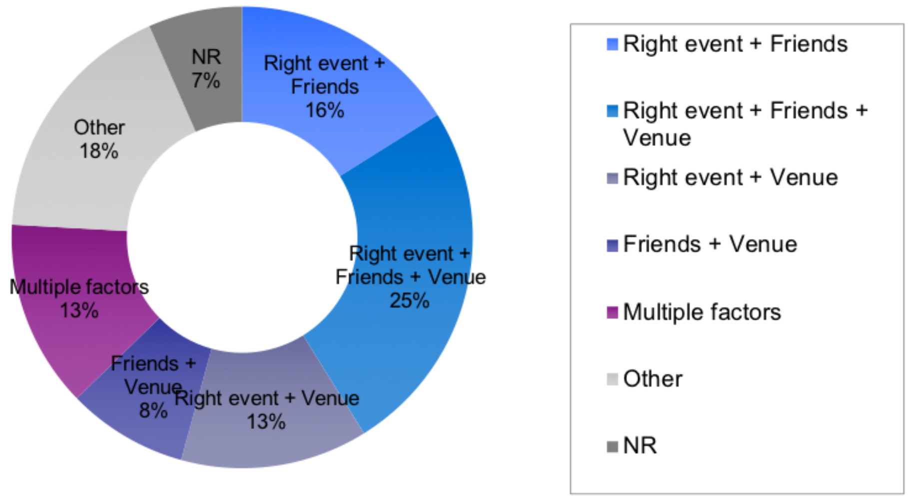


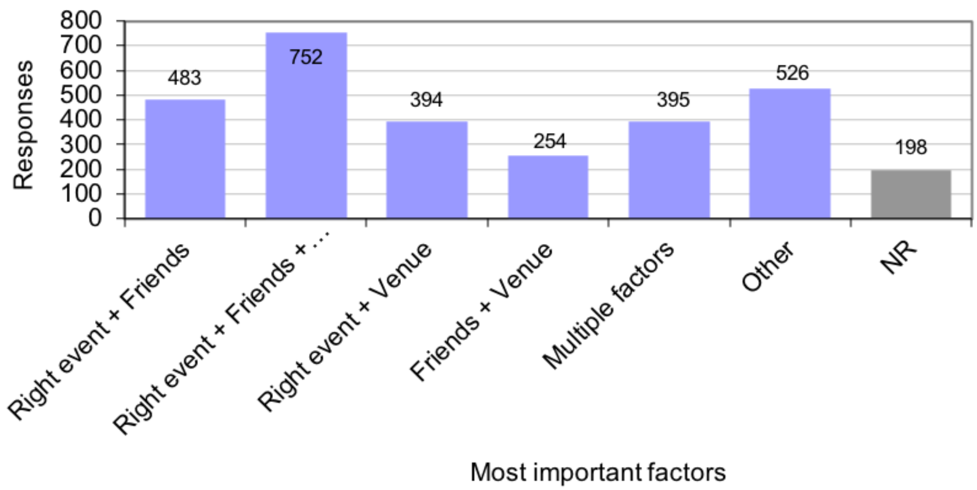
Outing frequency x Most important Factors when going out:

Age x Factors going out.

- Importance of friends when going out goes down w/ age
- Importance of right event goes up with age
- Venue importance goes up with age
- Discovery goes up with age
- Importance of meeting new ppl & romance goes down with age
- Importance of ‘partying’ goes down with age.

Frequency	Responses	% of Responses
Right event + Friends	483	16%
Right event + Friends + Venue	752	25%
Right event + Venue	394	13%
Friends + Venue	254	8%
Multiple factors	395	13%
Other	526	18%
NR	198	7%
Total	**3,002**	**100%**





SECONDARY SOURCES

TD Vancouver Jazz Fest's onsite survey revealed that attending the Jazz Fest was a group activity for most attendee's: 55% attended with 2 or more (ie: 3 people or more in total). 28.2% reported being there with One other person, 17.3% reported attending alone. (Note: the sample size is 255 people surveyed)

10. SUMMARY

The DoBC survey set out to provide a snapshot of consumer behaviour in British Columbia around music and other forms of entertainment and nightlife. A clear picture of consumers has emerged, as an increasingly digital, active, social and engaged consumer base. Barriers to engagement were clearly outlined, and despite high engagement 'awareness' was still shown to be a key barrier in consumers going out more.

	Number of times out per month			
Average spend	**0-1**	**2-3**	**Total**	**Average spend**
Under $25	483	9	19	$12.50
$25-50	752	95	148	$37.50
$50-$100	394	106	166	$75.00
$100-200	254	34	52	$150.00
$200-300	395	7	10	$250.00
Over $300	526	0	1	$350.00
Total	**145**	**251**	**52**	

Throughout the project certain speed bumps were encountered: lower than expected responses to questions regarding diversity and under-represented groups. The DoBC team would like to alter their approach to consumer research in coming years to address some of these gaps, and to refine their insight in particular areas of interest:

1. Start the process with qualitative interviews and panels to direct the survey / areas of research with consumers at large and to explore issues surrounding under-represented groups.
2. Explore listening habits and appetite for discovery in music fans more closely, separately from general media consumption (streaming TV vs cable TV, desire to discover new music, etc).
3. Conduct the survey in a second metro (ie: Toronto) for comparative purposes.
4. Isolate some variables in responses: ie: with ticket pricing - (too expensive or is it service charges) and online habits (mobile or desktop)
5. Cast a wider net, survey consumers further afield from the DoStuff ecosystem and capturing more casual fans of music and entertainment

REFERENCES / THANKS:

DoBC would like to thank the following partners for their participation and contributions to this study:

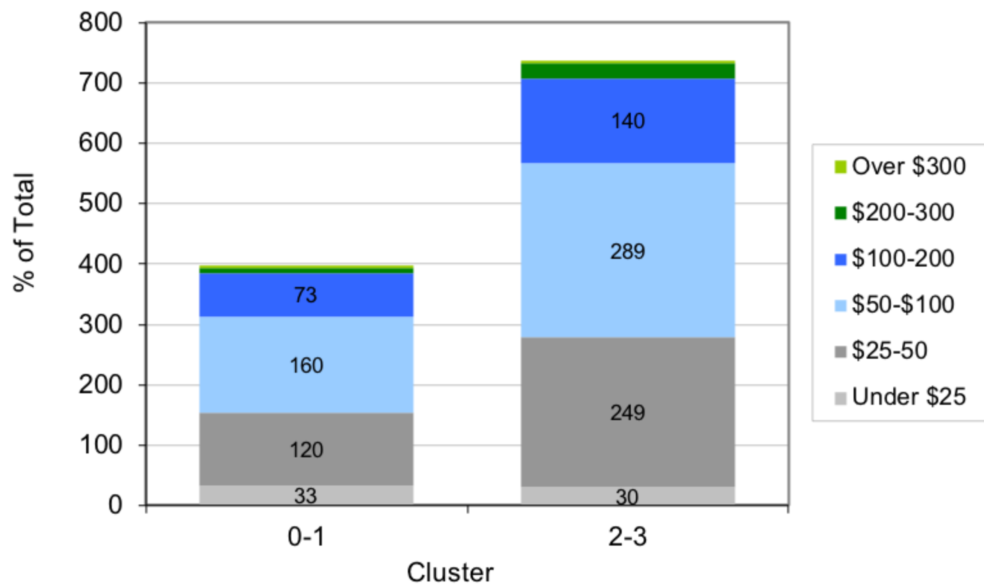
- Creative BC and the Province of British Columbia (https://www.creativebc.com)
- Honda Celebration of Light (https://hondacelebrationoflight.com)
- Skookum (https://www.skookumfestival.com)
- Atomique Productions (http://atomiqueproductions.com)
- Coastal Jazz: TD Vancouver Jazz Festival (https://www.coastaljazz.ca)

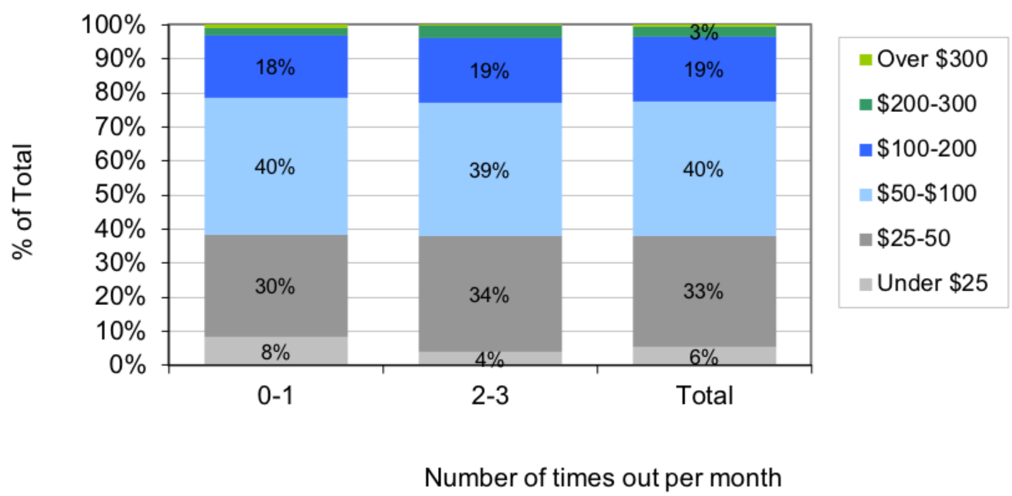
Potential improvement from better awareness: (i.e. shifting from once a month to twice a month, or 2x per month to 3x per month)			30%
Respondents	145	251	396
Increase	44	75	119
Spend increase (monthly)	3,124	5,543	8,666
Spend increase (annual)	37,488	66,510	103,995
Respondents aged 25 to 34			1,036
Population in Vancouver and Victoria aged 25 to 34			141,785
Scale-up factor			137
Portion in this age group that are "active" in going out			50%
Reduced scale-up factor			68
Spend increase (annual)			$7.12M

11.OPPORTUNITIES: (ANALYSIS WORKS)

Looking at the survey data, and specifically the barriers for event engagement (going out more) and average spend per outing, Analysis Works quantified several opportunities for growth in the live music sector of BC. These opportunities focus on the 3000 consumers surveyed and are not extrapolated or expanded into the larger consumer base in British Columbia.

Opportunity 1: Q17 Avg Personal Spend / Q22: Would be more active if was more aware:





Interpretation:

If we only focused on the 1,000 respondents to the survey aged 25 to 34 and made a 30% improvement in awareness, this would be worth approximately $104k per year. Using available census data* to scale this opportunity, increasing awareness and shifting 25-34's to go out to one more music event per month would lead to over $7M in additional revenue per year.

*Sources: Vancouver Census (LINK), StatsCan (LINK)

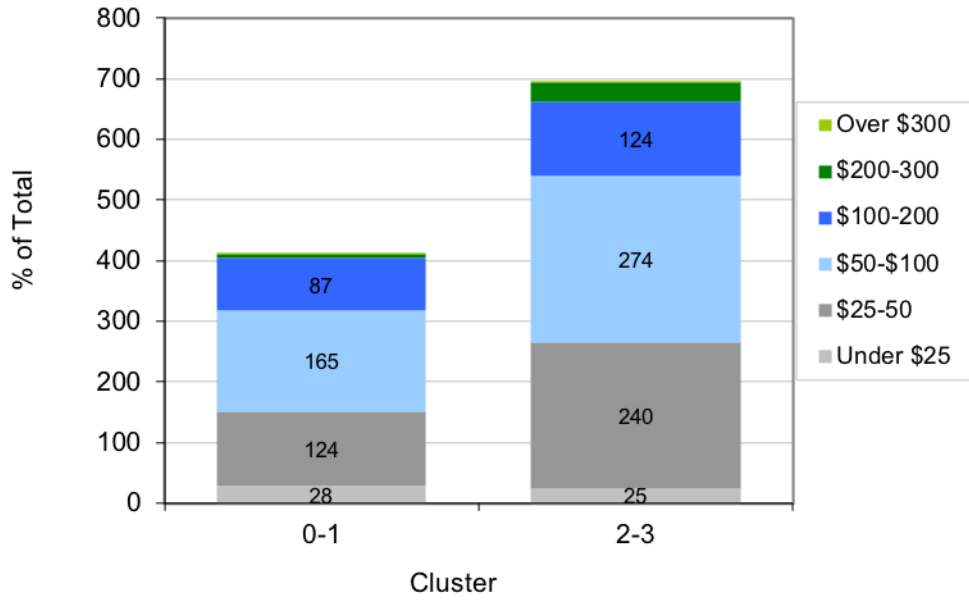
Opportunity 2: Activation: earlier shows
Q1: Avg personal Spend
Cluster: would be more active if shows were earlier

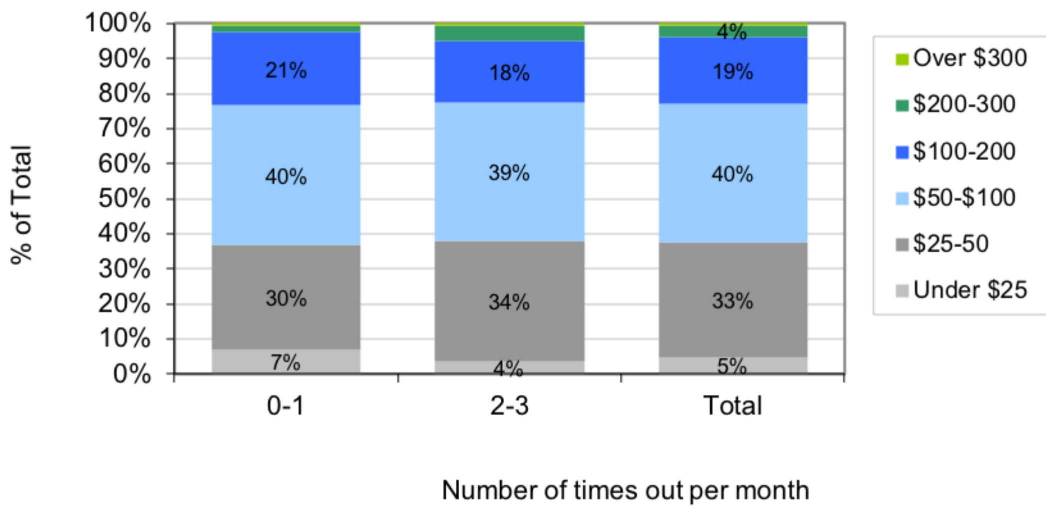
	Number of times out per month			
Average spend	**0-1**	**2-3**	**Total**	**Avg spend**
Under $25	28	25	53	$12.50
$25-50	124	240	364	$37.50
$50-$100	165	274	439	$75.00
$100-200	87	124	211	$150.00
$200-300	8	31	39	$250.00
Over $300	2	3	5	$350.00
Total	**414**	**697**	**1,111**	
Not clustered			**1,891**	

Average spend	0-1	2-3	Total
Under $25	7%	4%	5%
$25-50	30%	34%	33%
$50-$100	40%	39%	40%
$100-200	21%	18%	19%
$200-300	2%	4%	4%
Over $300	0%	0%	0%
Total	**100%**	**100%**	**100%**
Average spend	**$80.01**	**$82.16**	**$81.36**

Potential improvement from earlier shows: (i.e. shifting from once a month to twice a month, or 2x per month to 3x per month)			20%
Respondents	414	697	1,111
Increase	83	139	222
Spend increase (monthly)	6,625	11,453	18,078
Spend increase (annual)	79,500	137,430	216,930

	0-1	2-3	Total
Under $25	53%	47%	100%
$25-50	34%	66%	100%
$50-$100	38%	62%	100%
$100-200	41%	59%	100%
$200-300	21%	79%	100%
Over $300	40%	60%	100%
Total	**37%**	**63%**	**100%**





Interpretation:

If we only focused on the 3,000 respondents to the survey and made a 20% improvement in making shows available earlier, this would be worth approximately $216k per year. Extrapolating the survey results to the size of this demographic in British Columbia, earlier shows becomes a $4.68M opportunity *(Note: some overlap with "awareness" opportunity).

Potential improvement from better awareness: (i.e. shifting from once a month to twice a month, or 2x per month to 3x per month)			20%
Respondents	142	244	386
Increase	28	49	77
Spend increase (monthly)	2,080	3,620	5,700
Spend increase (annual)	24,960	43,440	68,400
Respondents aged 25 to 34			1,036
Population in Vancouver and Victoria aged 25 to 34			141,785
Scale-up factor			137
Portion in this age group that are "active" in going out			50%
Reduced scale-up factor			68
Spend increase (annual)			$4.68M

12. HOW CAN MUSICIANS, VENUES, EVENTS USE THIS INFO?

Help music discovery? Increase engagement with events? Market events better across all categories?

Venues & Promoters:

The DoBC consumer study highlights the intersectionality of Digital Media with Word of mouth and Social as pillars to successful promotion of events. Looking at the information gathered looking at 'Barriers' many suggestions come to mind regarding event marketing and promotion.

- **Price** was demonstrated to be the top barrier to going out, promoters hope to sell their shows out in advance: offering time sensitive variable pricing may help promoters and venues reach 'break even' on shows in advance of concert date.
- **Awareness** was a top reason for not going out: and could be addressed (along with price sensitivity) by offering variable or discounted pricing in exchange for social posting. In addition to addressing the top 2 barriers to going out this would help generate valuable word of mouth and increase the social media presence of the event.
- **Timing:** 'Shows being too late' was the #3 reason for not going out more, (#2 in Vancouver Suburbs), having early shows may help to reach a larger audience - especially in the suburbs and with older demos.
- **Social:** 'Friends not going' was the #4 barrier for consumers going out more, and was a stronger factor with consumers under 34. Ways to address this barrier include multi-ticket bundle deals. Variable pricing tied to social posts may also address this barrier by increasing the visibility of consumers attending events to their social circle.

Musicians & Managers:

This study illustrates how discovery and listening habits have changed over the past 5 years. Streaming services and digital media have overtaken traditional media as the primary method of listening and discovery of music. All indications from this survey indicate that this trend will continue as consumers age - with less-digitally inclined 44-55 y/o's and 55+ become more digitally adept.

Streaming:

- Should be prioritized as a primary means of discovery, especially with pop/non-specialty genres.
- Artists should focus on the social aspects of streaming (likes, followers, shares, adds to library) not just promoting their tracks.
- Playlist promotion is becoming a vital aspect of breaking new artists; similar to the role once played by radio in music discovery.
- Streaming services offer the opportunity to grow audiences within their ecosystems, and this can be vital in breaking through as a new artist: understanding the tools of all streaming platforms is key.
- Ensure your streaming profile is updated with concert listings.

Digital media:

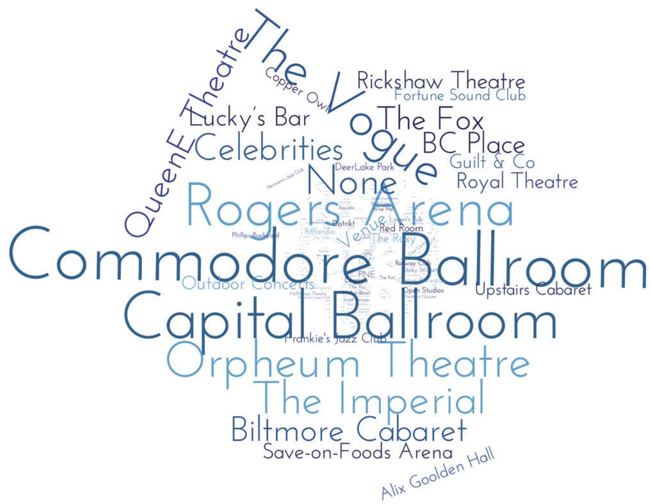
- One of the best ways to promote music, particularly given the widespread adoption of streaming.
- Digital media (websites, blogs, online press) is also an important factor to artist discovery, and should be the focus of media outreach

Social Media:

- Use of Social Media is pervasive across all demos and given its unique position between digital media, and 'word of mouth'
- Provides the opportunity to build audiences, direct to content, announce tours, live streams, etc.
- Social also provides musicians the opportunity to reach other audiences and follower lists through partnerships, promotions, publicity, and content.

13. ADDENDUM – FAVOURITE BC VENUES AND VENUE HEAT MAPS

DoBC asked respondents to name their favourite (BC) music venues. The results can be found in this word cloud (and raw responses in the appendices)



DoBC Venue Map:

DoBC developed a program assimilating their platform data on venues and audience searches. This enabled the team to visualize venue density and audience visits to venue listings on the DoBC platform:

Image 1: Heatmap of BC venues listed on the DoBC platform

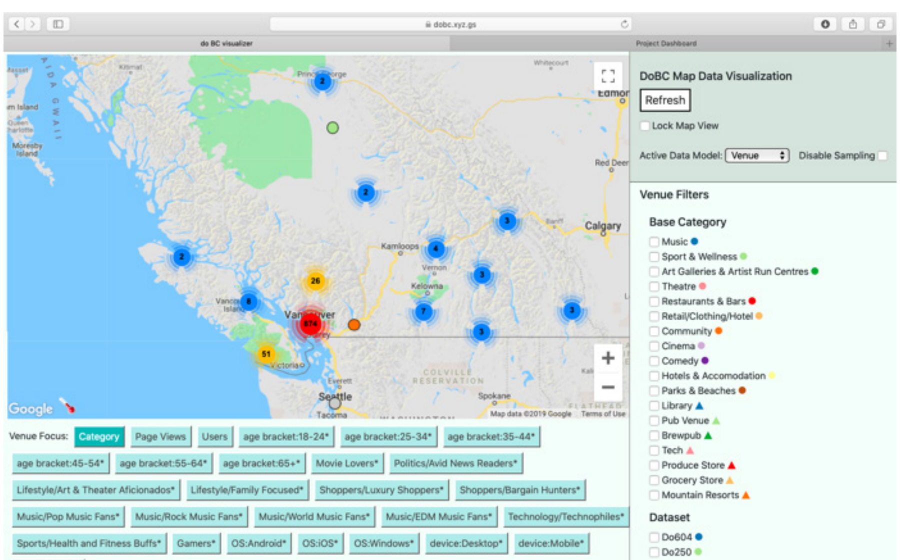


Image 2: Vancouver centered Venue heat map

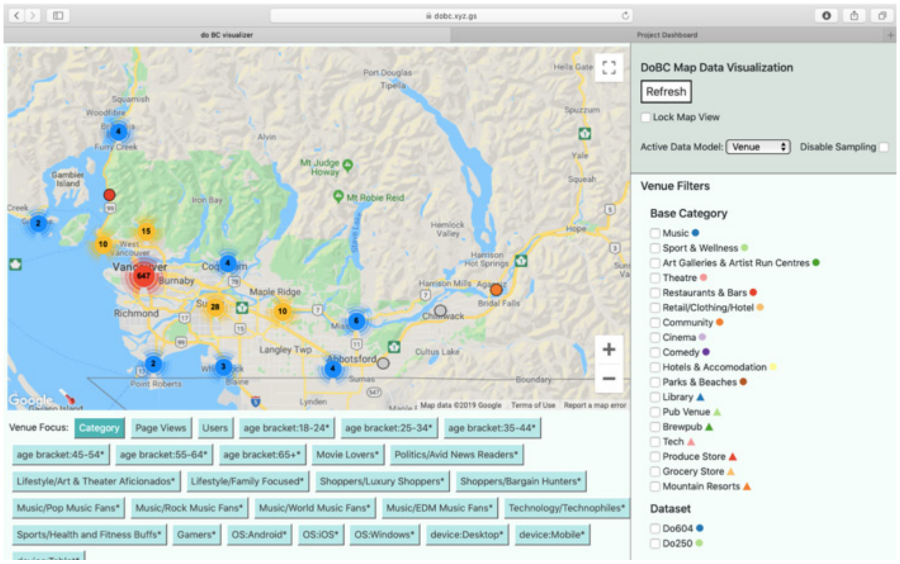


Image 3: Victoria centered Music venue heatmap w/ detail of The Roxy Theatre's listing:

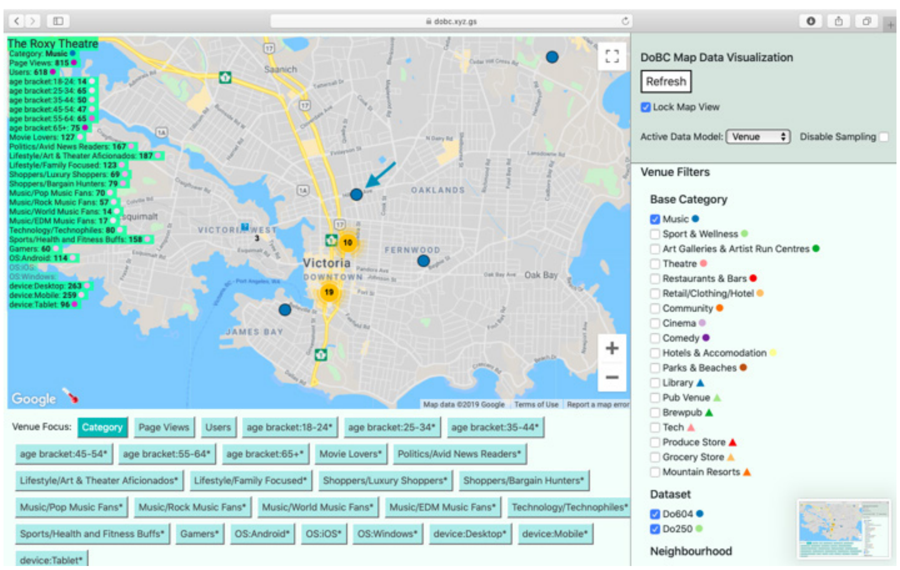
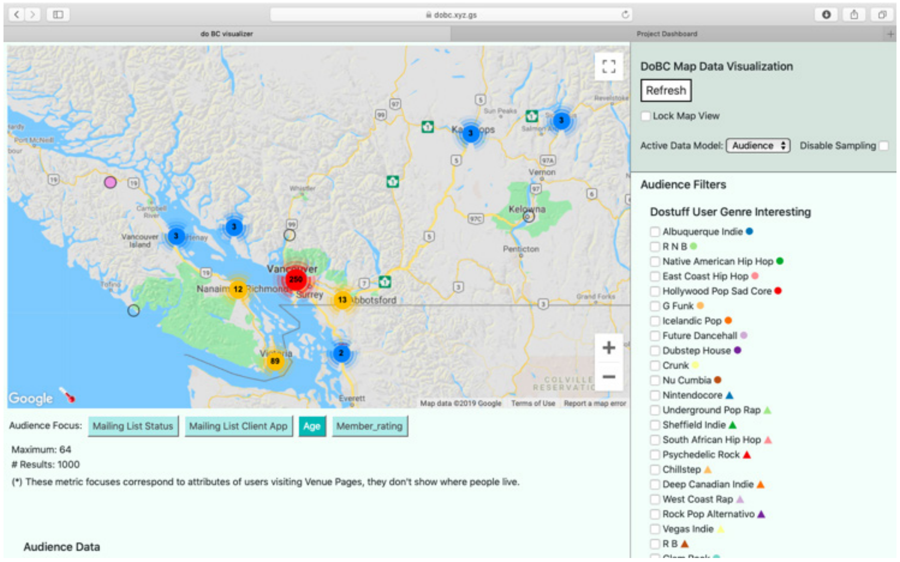


Image 4: Audience based inquiries to venues in BC



14. ADDENDUM – BC ARTIST LIST

See attached.

15. ADDENDUM – TEAM AND PARTNER INFO

ABOUT DOBC MEDIA

Do604 Vancouver and Do250 Victoria are the west coast edition of the DoStuff Network in Canada, part of a 20 city network across North America. Our events calendar platform solves the problem of "what to do tonight" by surfacing the best in local events and culture, from large concert and festival experiences to underground tastemaker events. To do this right, we believe in and are committed to doing things locally. We're natives of every city we're in - the entrepreneurs, promoters, musicians, and venue owners who live and breathe the scene.

This commitment to local reveals itself most strongly in our unique blend of digital and experiential marketing. We not only help brands and artists develop locally targeted digital campaigns, we make it easier for them to participate in the local scene. We help our partners navigate each city like a local to reach their core audience in their daily lives in a more meaningful and effective way.

Check out our site at Do604.com and Do250.com or download the DoStuff app in the apple store today for ticket giveaways, breaking show announcements, and to discover what to do tonight.

ABOUT NATHAN HARLAND

Nathan Harland is a Vancouver based consultant specializing in music and entertainment business development, marketing, and research. With over 20 years of marketing and promotion experience with independent and major labels, he was instrumental in implementing EMI Music's global consumer insight initiative overseeing research and reporting in Canada. Nathan founded Hidden Tracks Consulting a business and artist development firm in late 2018.

ABOUT ANALYSISWORKS

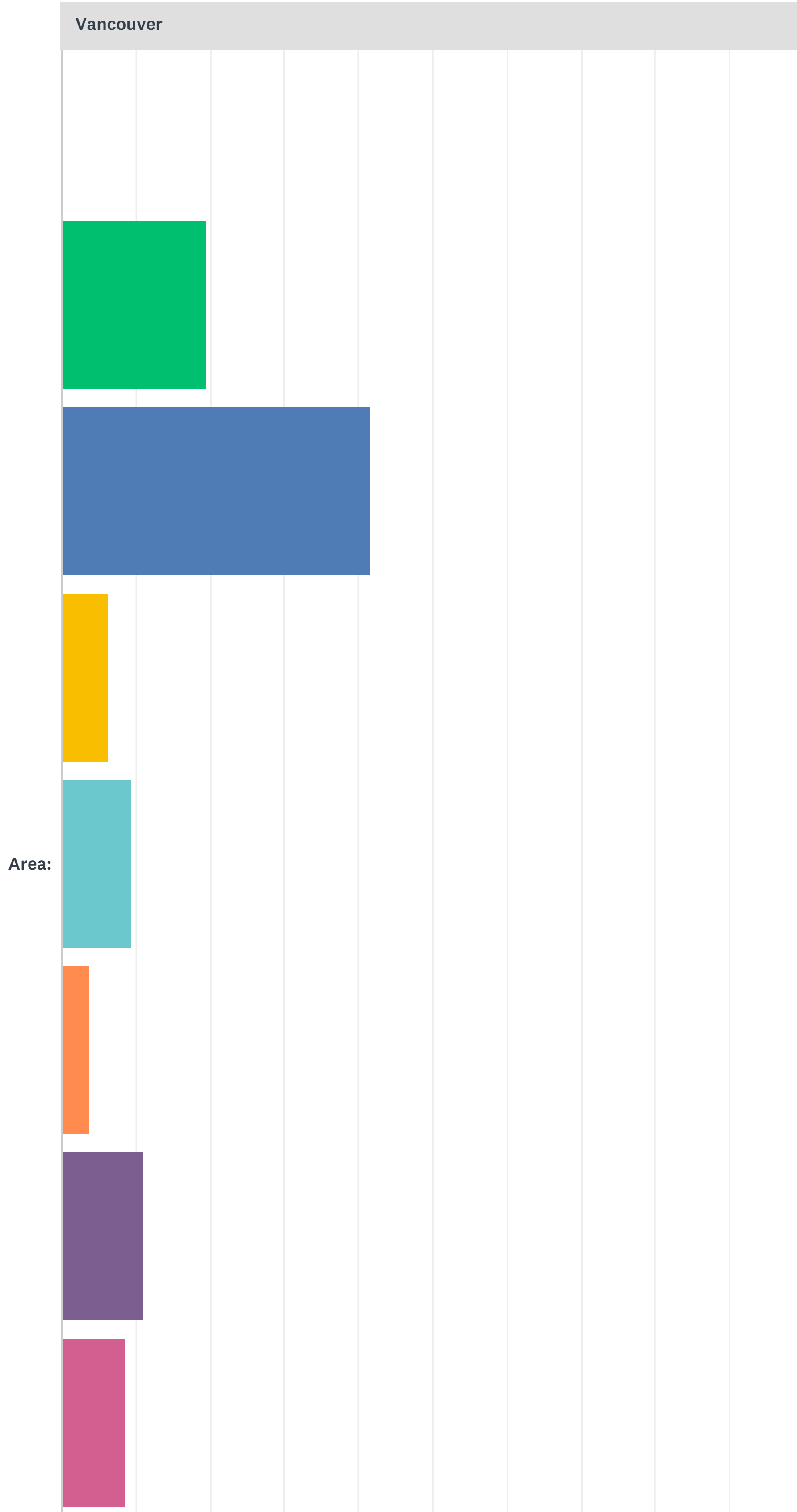
AnalysisWorks is a Vancouver-based management-consulting firm that specializes in evidence-based organizational support for public- and private-sector clients. Our corporate philosophy is to make our world measurably better by combining engaging, collaborative experiences with industry leading data analytics. Incorporated in 2000, we have grown primarily through referrals from successful projects in British Columbia, Alberta, Saskatchewan and Ontario. In 2012, 2015 and 2018 we were recognized as one of Canada's fastest growing companies.

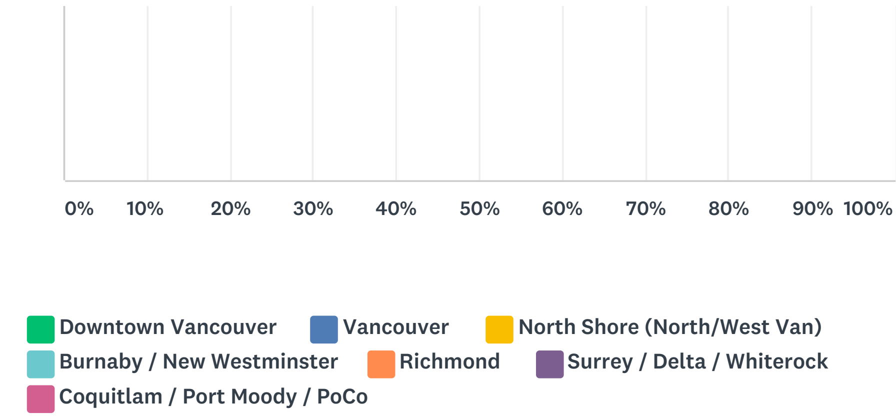
16. APPENDIX – FULL DOBC SURVEY RESULTS

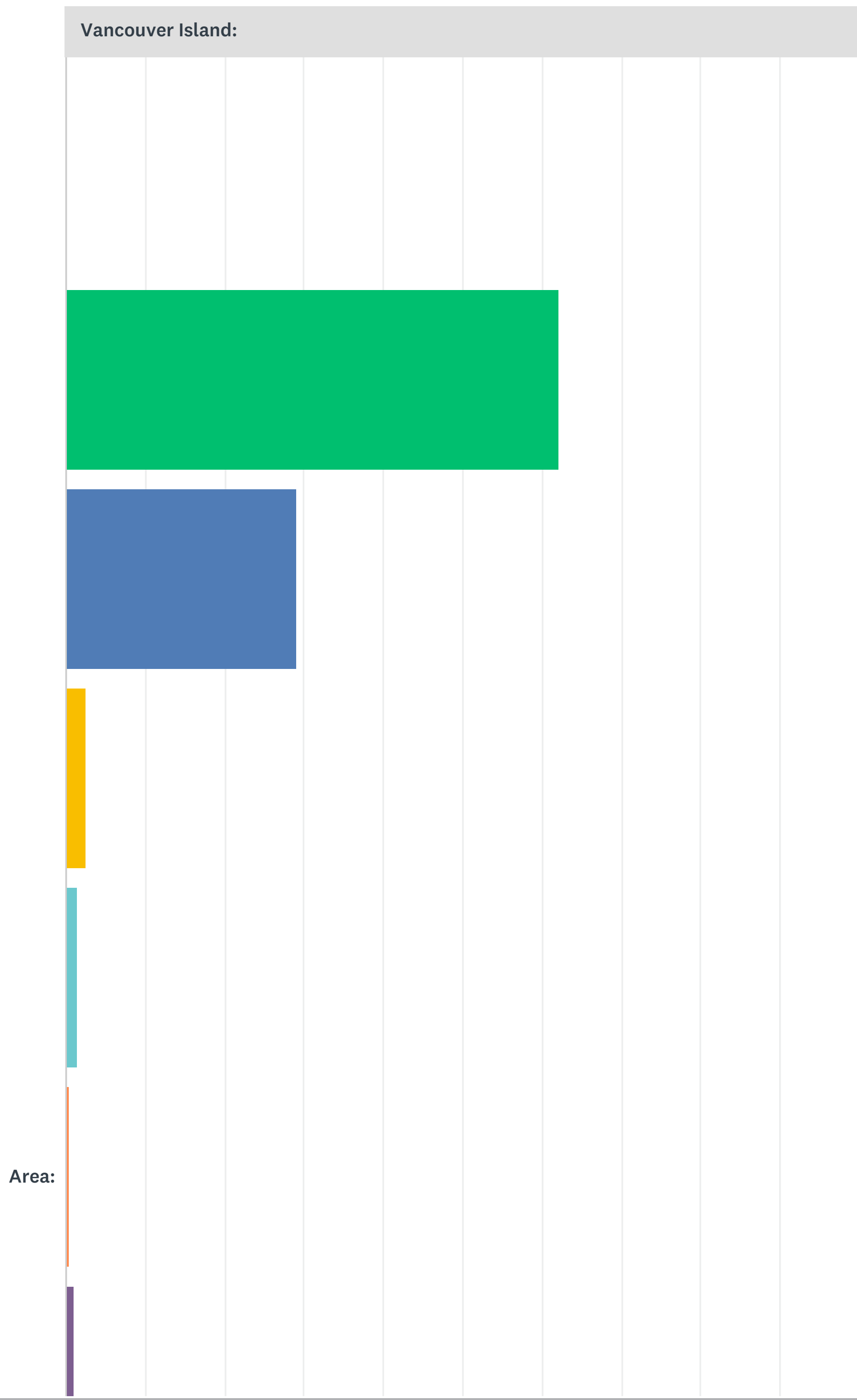
See next page.

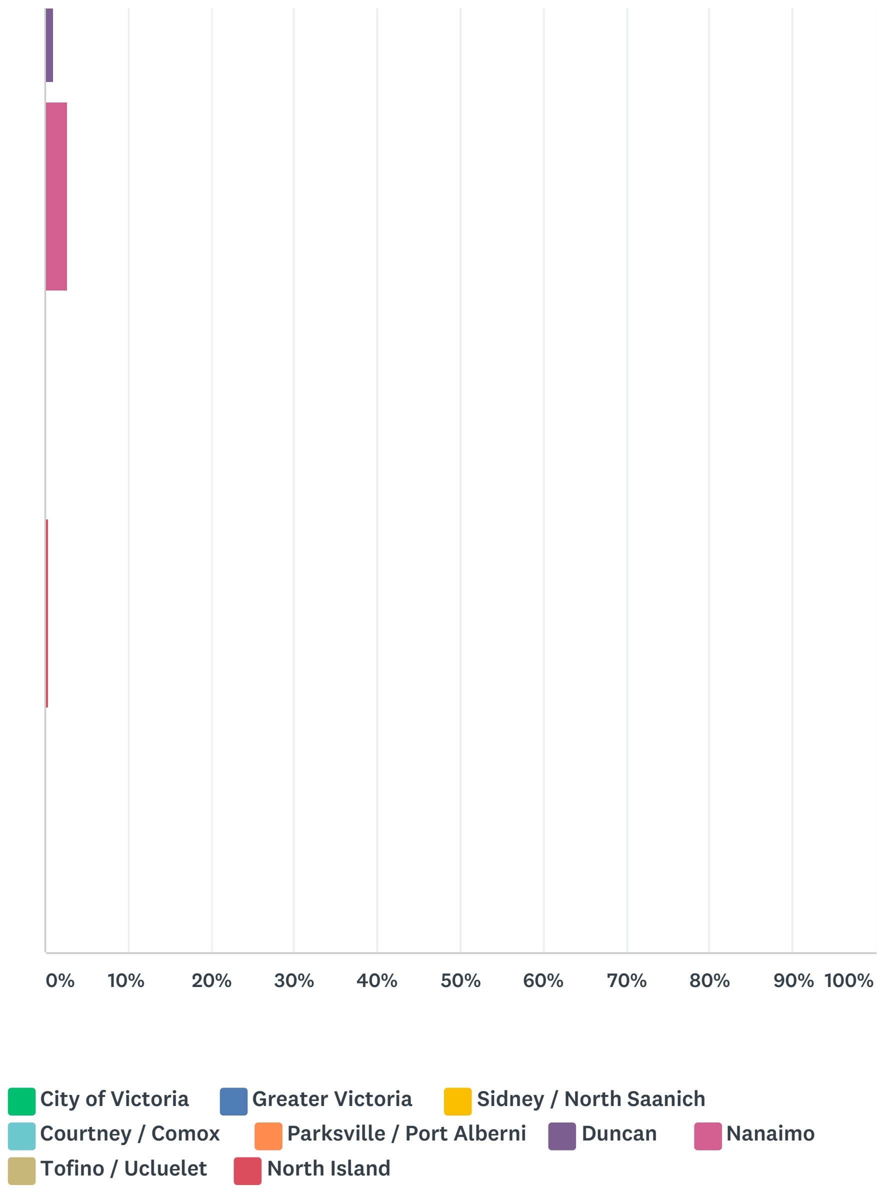
Q1 Where in BC do you live?

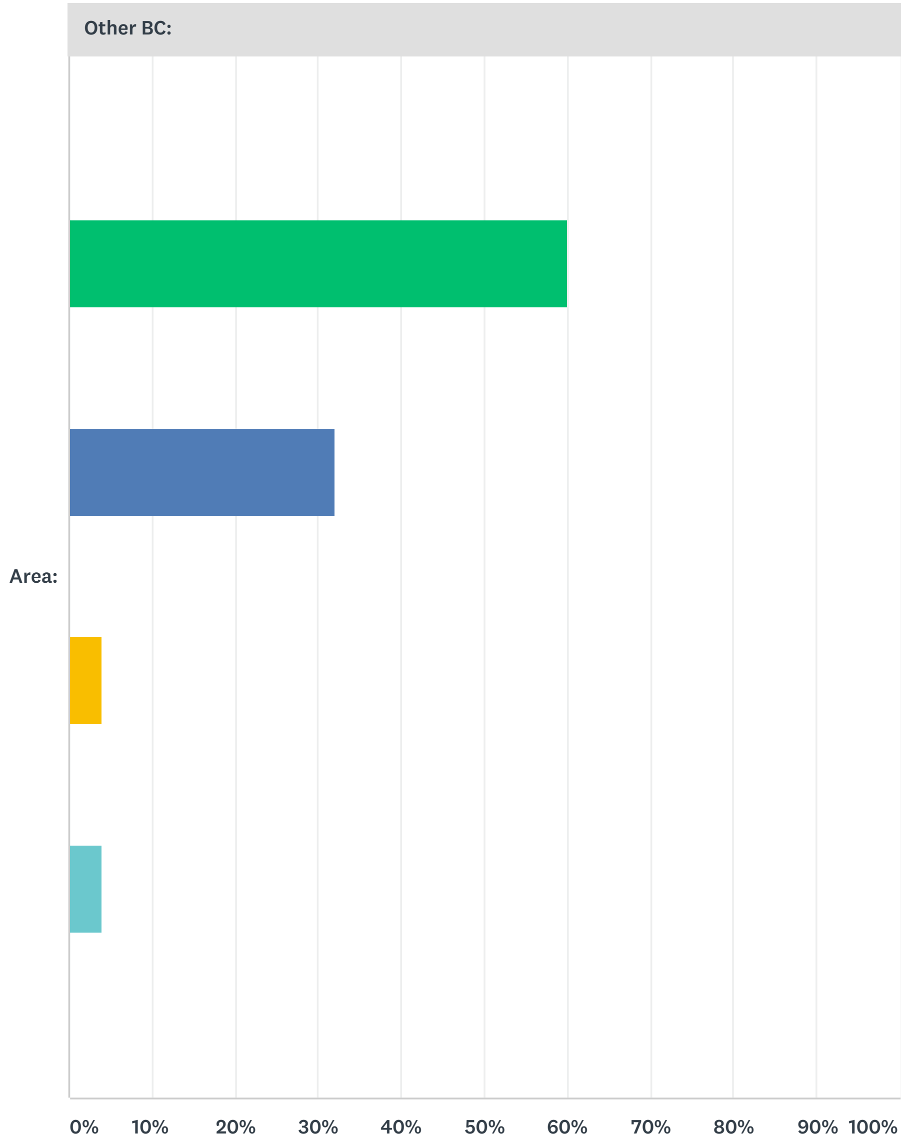
Answered: 2,551   Skipped: 456




0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Downtown Vancouver
Vancouver
North Shore (North/West Van)
Burnaby / New Westminster
Richmond
Surrey / Delta / Whiterock
Coquitlam / Port Moody / PoCo


Vancouver Island:
Area:


0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
City of Victoria
Greater Victoria
Sidney / North Saanich
Courtney / Comox
Parksville / Port Alberni
Duncan
Nanaimo
Tofino / Ucluelet
North Island



Vancouver

	DOWNTOWN VANCOUVER	VANCOUVER	NORTH SHORE (NORTH/WEST VAN)	BURNABY / NEW WESTMINSTER	RICHMOND	SURREY / DELTA / WHITEROCK	COQUITLAM / PORT MOODY / POCO	TOTAL
Area:	19.43% 366	41.56% 783	6.32% 119	9.34% 176	3.82% 72	10.99% 207	8.55% 161	1,884

Vancouver Island:

	CITY OF VICTORIA	GREATER VICTORIA	SIDNEY / NORTH SAANICH	COURTNEY / COMOX	PARKSVILLE / PORT ALBERNI	DUNCAN	NANAIMO	TOFINO / UCLUELET	NORTH ISLAND	TOTA
Area:	62.21% 428	29.07% 200	2.47% 17	1.45% 10	0.44% 3	1.02% 7	2.76% 19	0.15% 1	0.44% 3	68

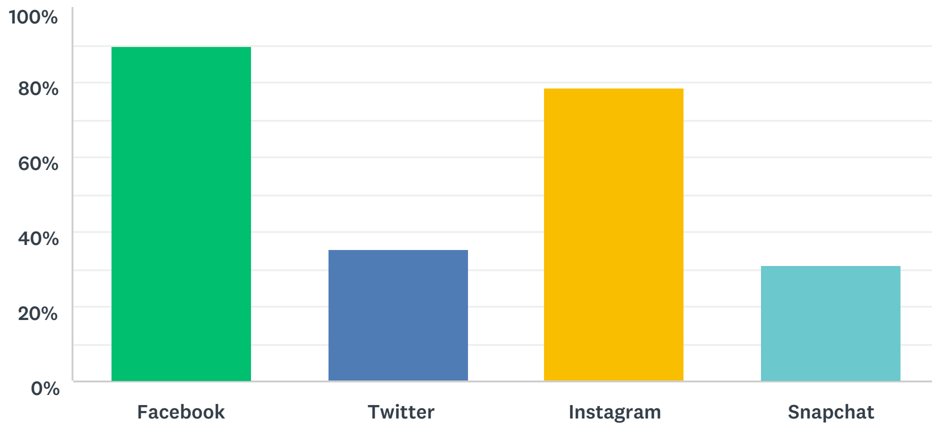
Other BC:

	INTERIOR BC (THE KOOTENAYS)	PRINCE GEORGE	PRINCE RUPERT	NORTH EAST BC (FORT ST JOHN)	TOTAL

Area:	60.00%	32.00%	4.00%	4.00%	
	15	8	1	1	25

Q2 Which Social Media platforms do you use?

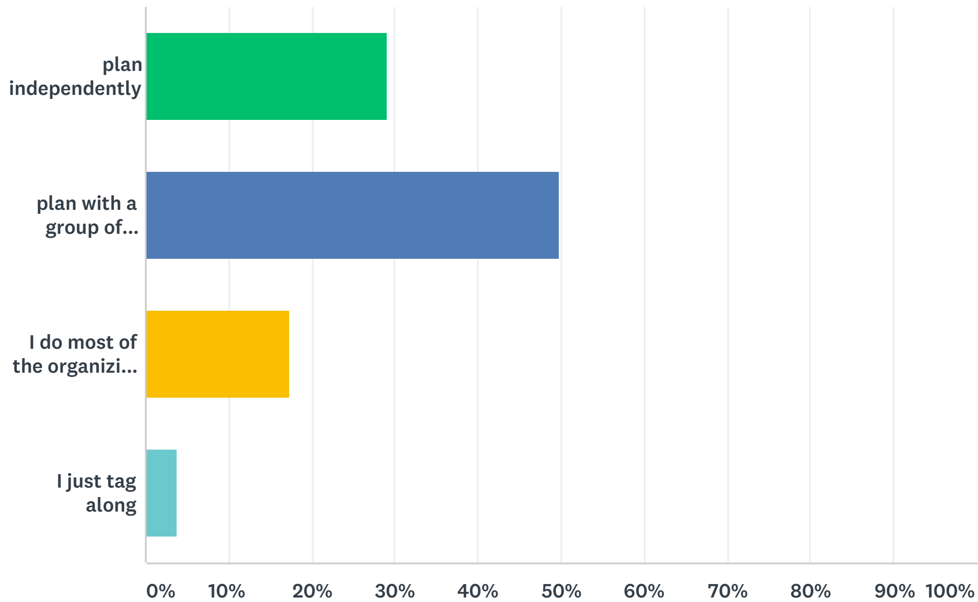
Answered: 2,951 Skipped: 56



ANSWER CHOICES	RESPONSES	
Facebook	89.63%	2,645
Twitter	35.58%	1,050
Instagram	78.62%	2,320
Snapchat	31.04%	916
Total Respondents: 2,951		

Q3 For my social outings, I normally

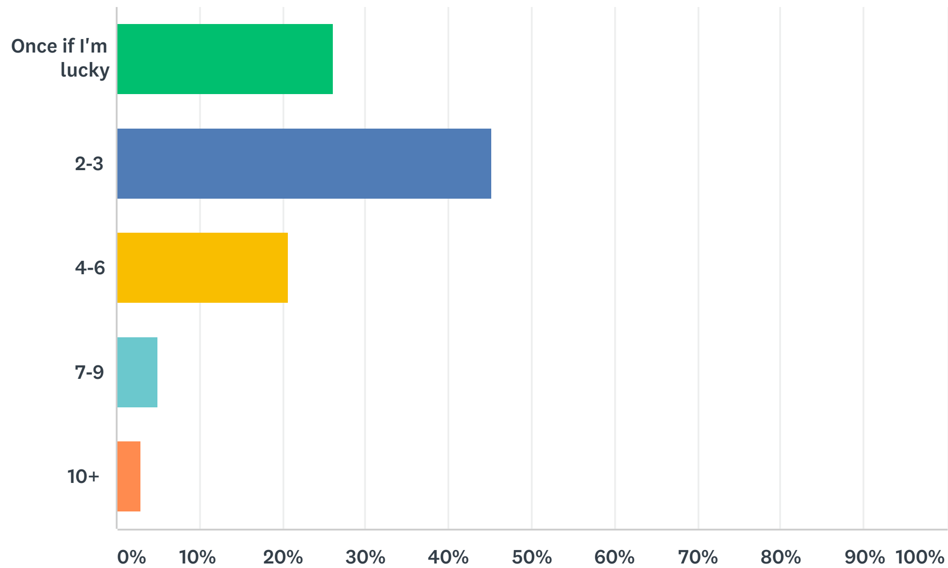
Answered: 2,773 Skipped: 234



ANSWER CHOICES	RESPONSES	
plan independently	29.17%	809
plan with a group of friends	49.84%	1,382
I do most of the organizing for my group	17.31%	480
I just tag along	3.68%	102
TOTAL		2,773

Q4 How often do you go out to an event or show per month?

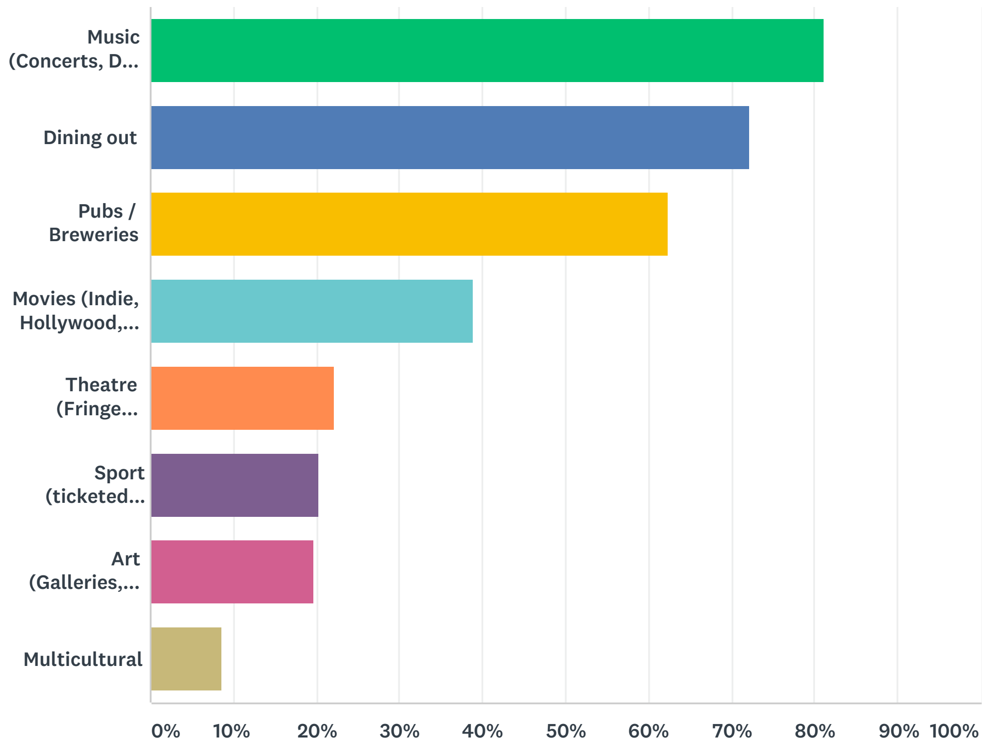
Answered: 2,796 Skipped: 211



ANSWER CHOICES	RESPONSES	
Once if I'm lucky	26.18%	732
2-3	45.21%	1,264
4-6	20.64%	577
7-9	5.11%	143
10+	2.86%	80
TOTAL		2,796

Q5 Most of the events I attend would be categorized as (pick 3):

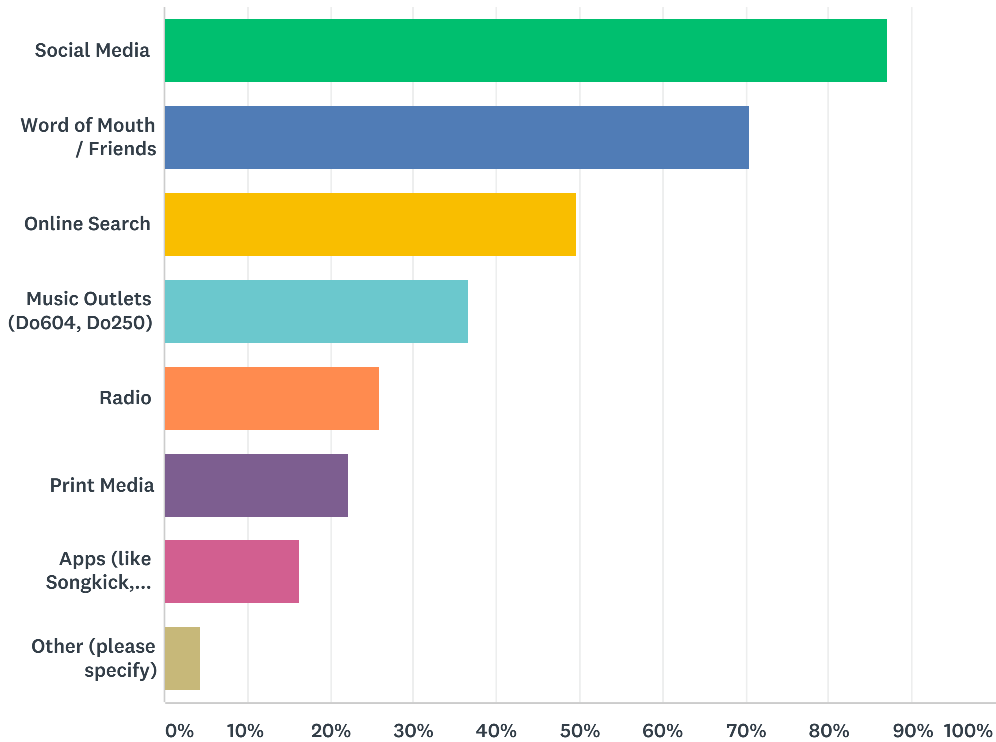
Answered: 2,813 Skipped: 194



ANSWER CHOICES	RESPONSES	
Music (Concerts, DJs, Festivals)	81.09%	2,281
Dining out	72.27%	2,033
Pubs / Breweries	62.35%	1,754
Movies (Indie, Hollywood, Outdoor screenings)	38.93%	1,095
Theatre (Fringe Festivals, Plays, Musicals)	22.15%	623
Sport (ticketed events)	20.23%	569
Art (Galleries, Openings)	19.59%	551
Multicultural	8.57%	241
Total Respondents: 2,813		

Q6 How do you learn about events you are interested in? (Pick 3)

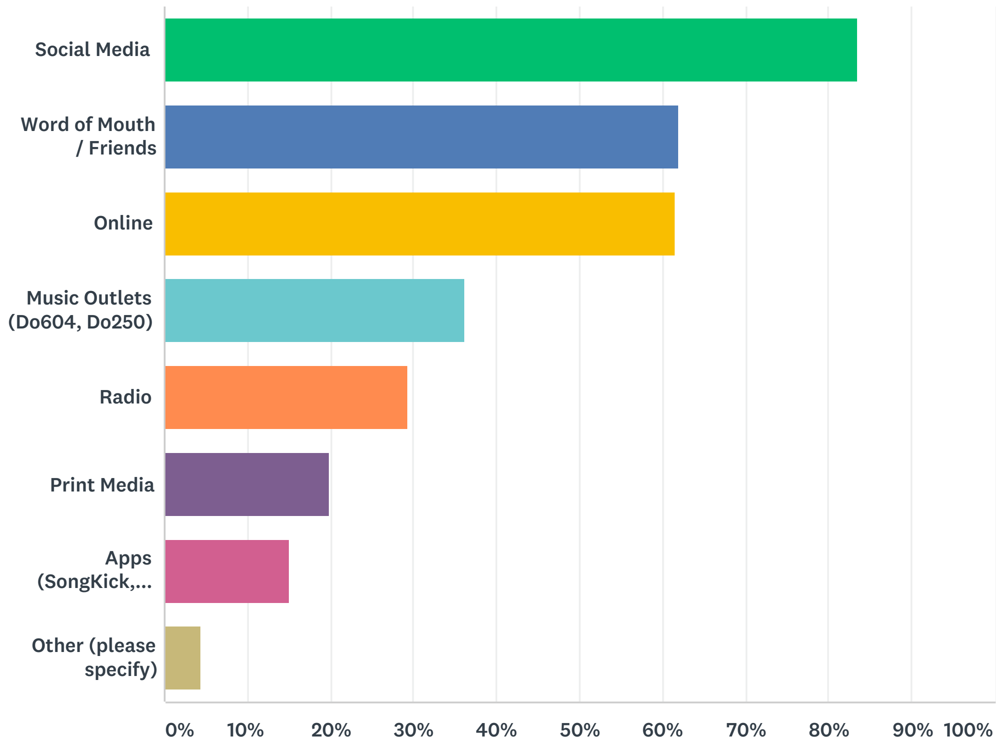
Answered: 2,811   Skipped: 196



ANSWER CHOICES	RESPONSES	
Social Media	86.94%	2,444
Word of Mouth / Friends	70.54%	1,983
Online Search	49.63%	1,395
Music Outlets (Do604, Do250)	36.71%	1,032
Radio	26.04%	732
Print Media	22.13%	622
Apps (like Songkick, DoStuff, BandisinTown)	16.33%	459
Other (please specify)	4.41%	124
Total Respondents: 2,811		

Q7 For music concerts / events: how do you find out about the shows or festivals you are interested in attending? (Pick 3)

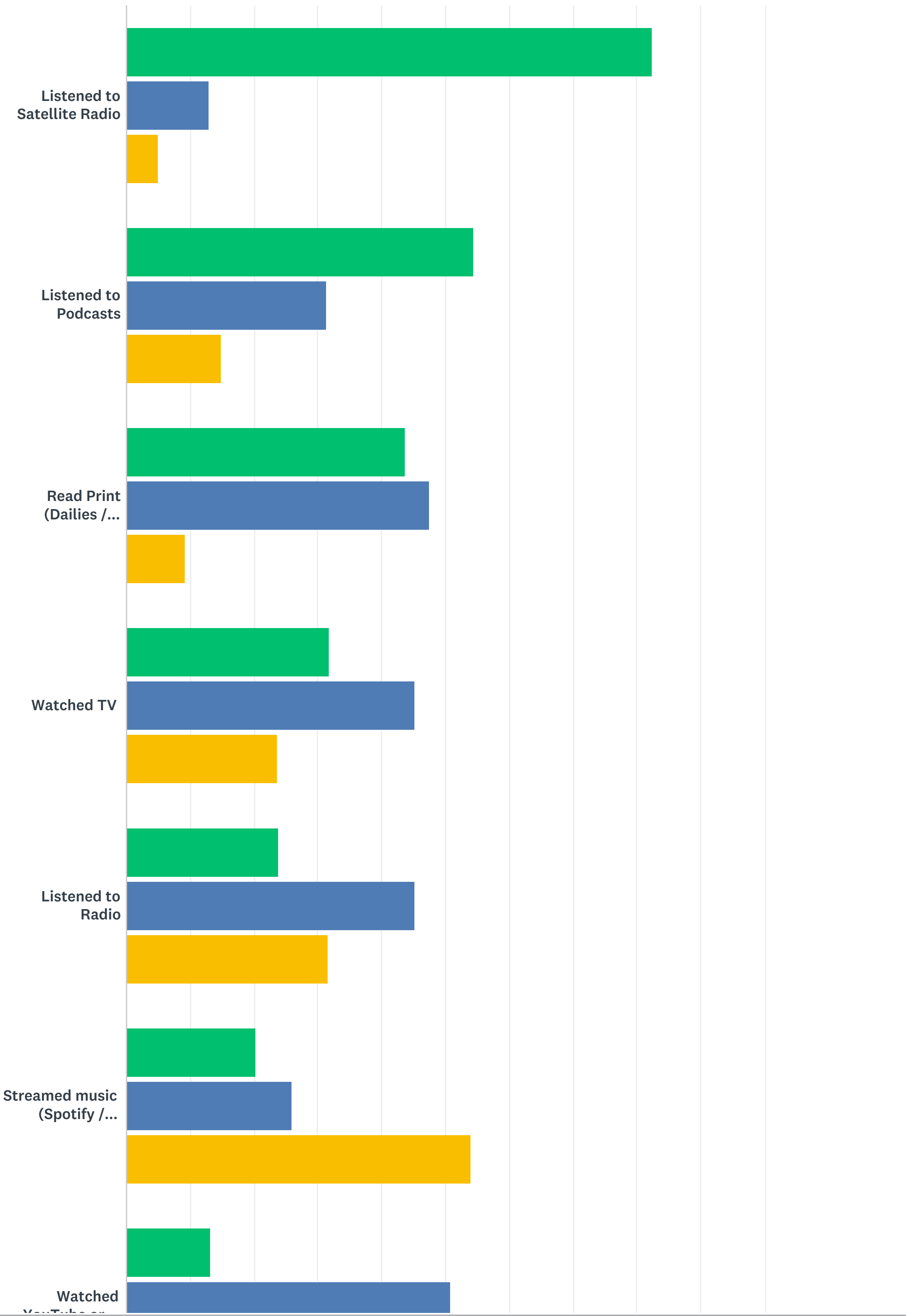
Answered: 2,809 Skipped: 198

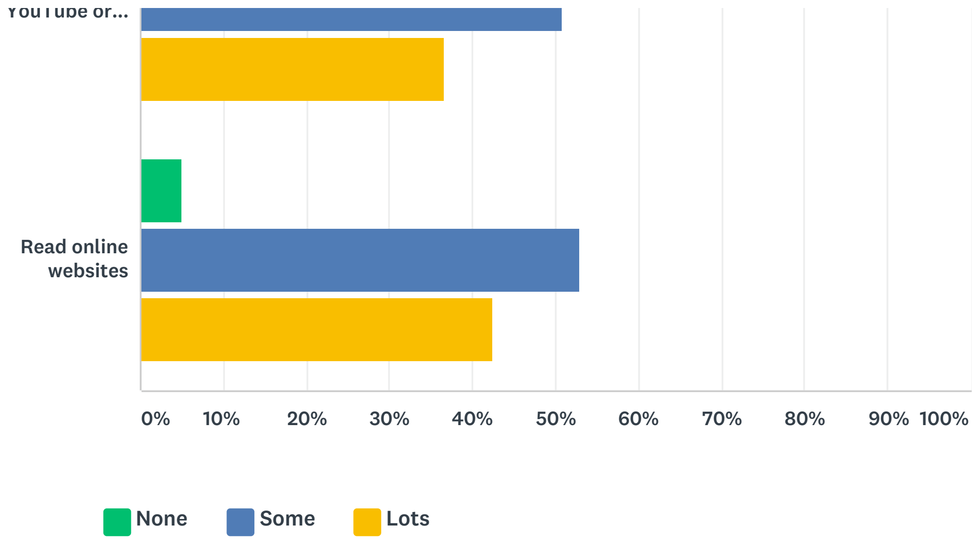


ANSWER CHOICES	RESPONSES	
Social Media	83.52%	2,346
Word of Mouth / Friends	61.94%	1,740
Online	61.48%	1,727
Music Outlets (Do604, Do250)	36.10%	1,014
Radio	29.30%	823
Print Media	19.90%	559
Apps (SongKick, EventBase, DoStuff)	15.06%	423
Other (please specify)	4.38%	123
Total Respondents: 2,809		

Q8 Which of these activities have you done in the last week?

Answered: 2,810   Skipped: 197

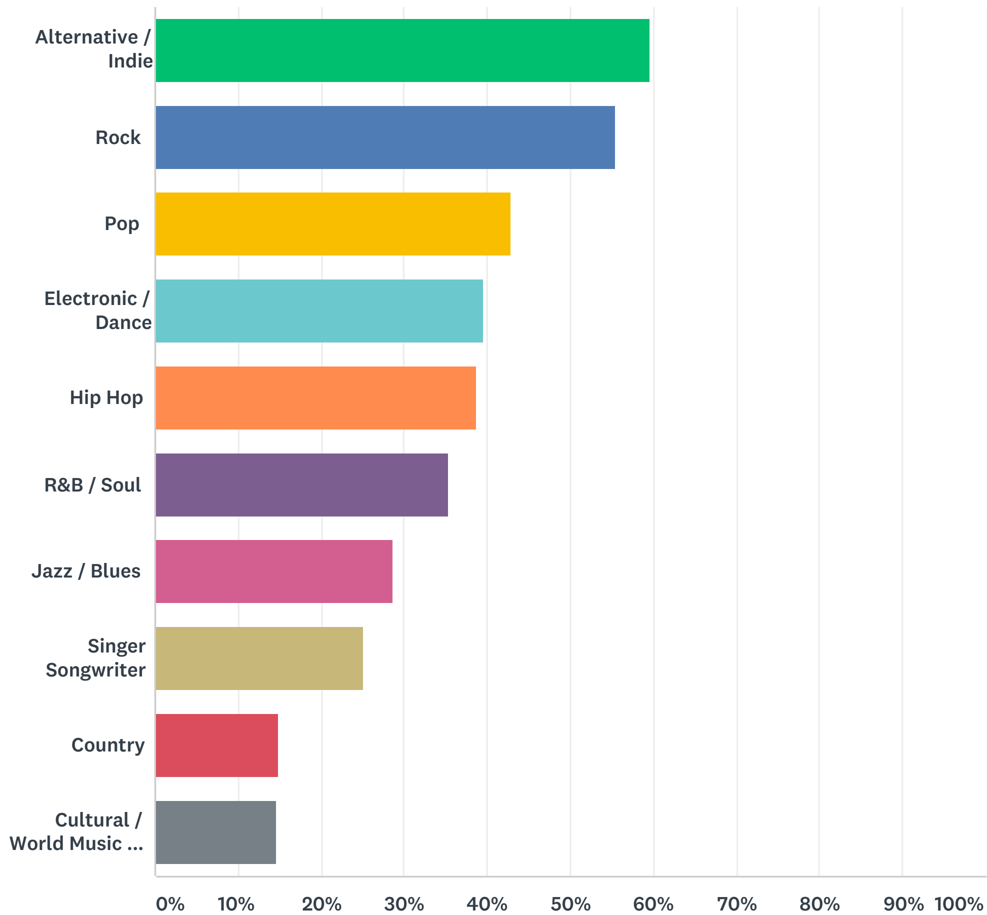




	NONE	SOME	LOTS	TOTAL RESPONDENTS
Listened to Satellite Radio	82.46% 2,219	12.97% 349	4.98% 134	2,691
Listened to Podcasts	54.37% 1,473	31.30% 848	14.77% 400	2,709
Read Print (Dailies / Weeklies /Magazines)	43.68% 1,205	47.41% 1,308	9.17% 253	2,759
Watched TV	31.71% 877	45.16% 1,249	23.72% 656	2,766
Listened to Radio	23.77% 658	45.12% 1,249	31.61% 875	2,768
Streamed music (Spotify / Apple Music)	20.39% 561	25.99% 715	53.91% 1,483	2,751
Watched YouTube or streamed music on YouTube	13.08% 364	50.74% 1,412	36.69% 1,021	2,783
Read online websites	4.92% 137	52.95% 1,474	42.56% 1,185	2,784

Q9 What genres of music you listen to or go to see? (Pick 3)

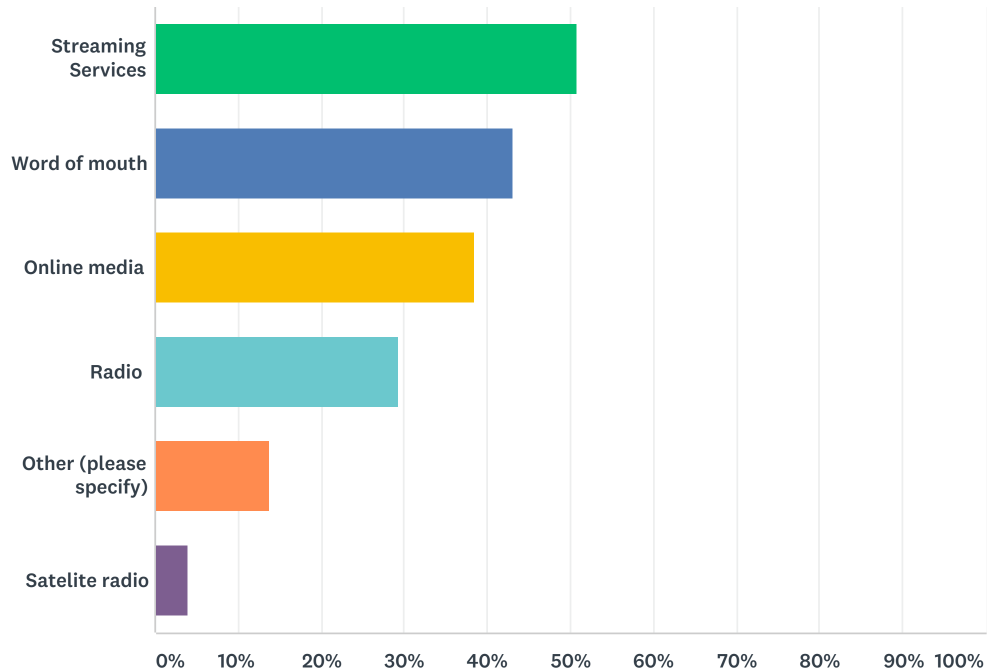
Answered: 2,808   Skipped: 199



ANSWER CHOICES	RESPONSES	
Alternative / Indie	59.54%	1,672
Rock	55.41%	1,556
Pop	42.84%	1,203
Electronic / Dance	39.64%	1,113
Hip Hop	38.75%	1,088
R&B / Soul	35.36%	993
Jazz / Blues	28.74%	807
Singer Songwriter	25.07%	704
Country	14.85%	417
Cultural / World Music / Indigenous	14.60%	410
Total Respondents: 2,808		

Q10 Where did you last discover a new artist? (check all that apply)

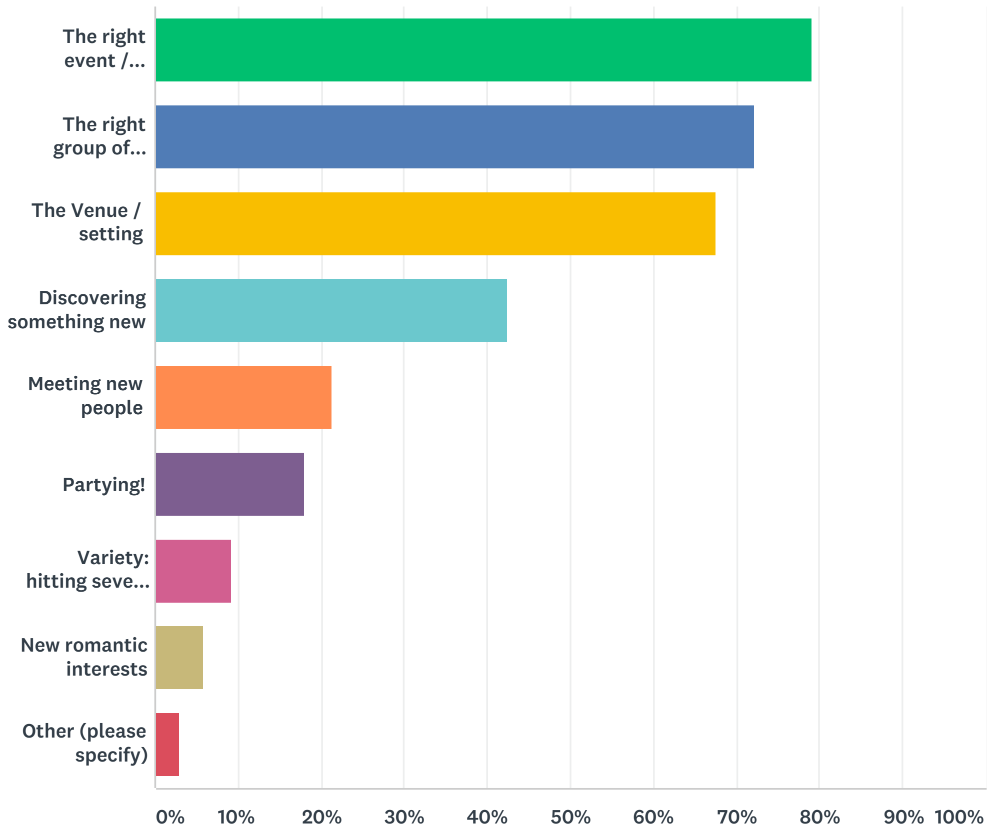
Answered: 2,808   Skipped: 199



ANSWER CHOICES	RESPONSES	
Streaming Services	50.93%	1,430
Word of mouth	43.16%	1,212
Online media	38.46%	1,080
Radio	29.27%	822
Other (please specify)	13.85%	389
Satelite radio	3.92%	110
Total Respondents: 2,808		

Q11 What are the most important factors to an awesome time out? (Pick 3)

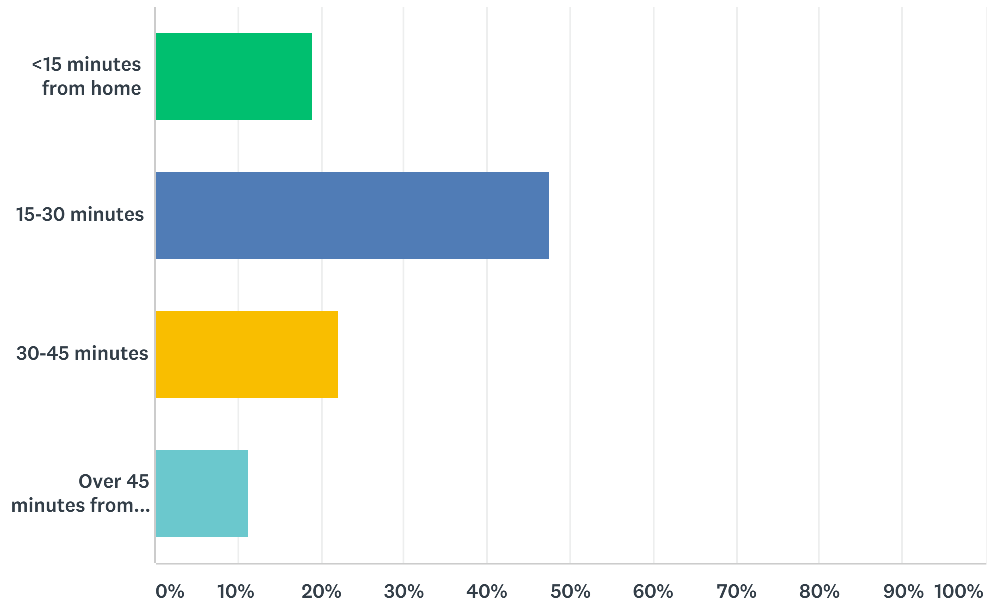
Answered: 2,809 Skipped: 198



ANSWER CHOICES	RESPONSES	
The right event / entertainment / artist	79.17%	2,224
The right group of friends	72.16%	2,027
The Venue / setting	67.60%	1,899
Discovering something new	42.40%	1,191
Meeting new people	21.40%	601
Partying!	17.94%	504
Variety: hitting several events / gatherings in one night	9.11%	256
New romantic interests	5.91%	166
Other (please specify)	2.95%	83
Total Respondents: 2,809		

Q12 How far do you typically travel to go out?

Answered: 2,800   Skipped: 207



ANSWER CHOICES	RESPONSES	
<15 minutes from home	18.96%	531
15-30 minutes	47.54%	1,331
30-45 minutes	22.25%	623
Over 45 minutes from home	11.25%	315
TOTAL		2,800

Q13 What is your favourite BC concert venue / club to go out to?

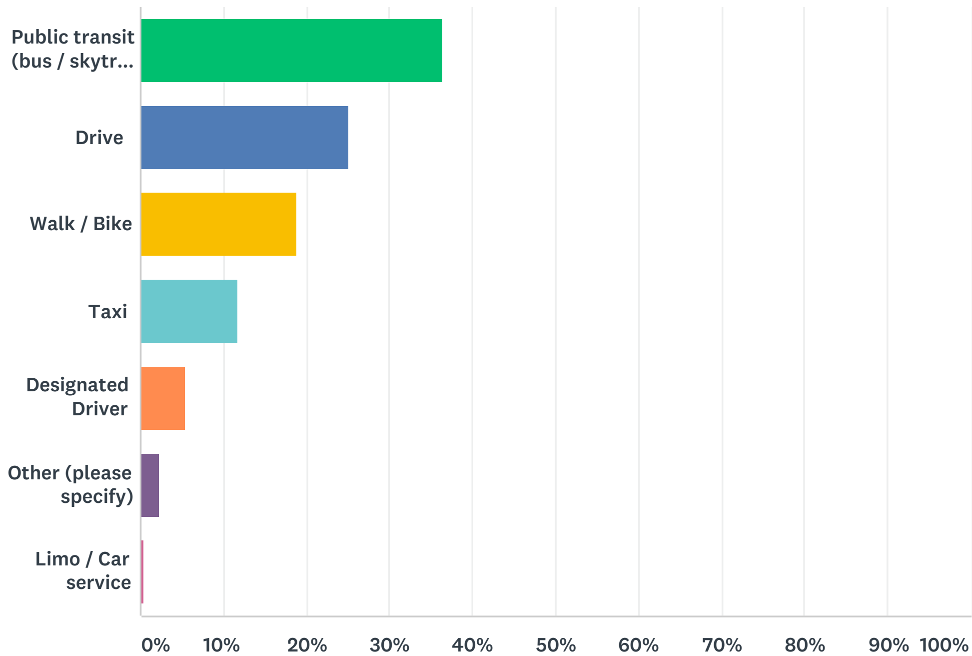
Answered: 2,765 Skipped: 242

Q14 What is your favourite BC restaurant to go to?

Answered: 2,746 Skipped: 261

Q15 How do you usually get to to events?

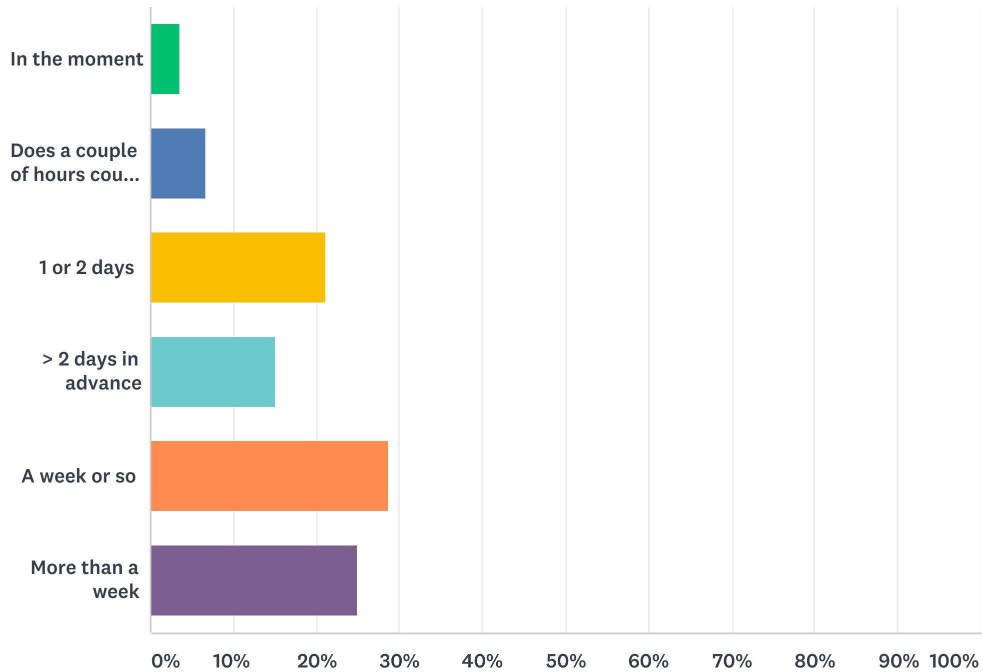
Answered: 2,806 Skipped: 201



ANSWER CHOICES	RESPONSES	
Public transit (bus / skytrain / etc)	36.46%	1,023
Drive	25.02%	702
Walk / Bike	18.82%	528
Taxi	11.69%	328
Designated Driver	5.38%	151
Other (please specify)	2.21%	62
Limo / Car service	0.43%	12
TOTAL		2,806

Q16 In general; how far in advance do you plan your outings?

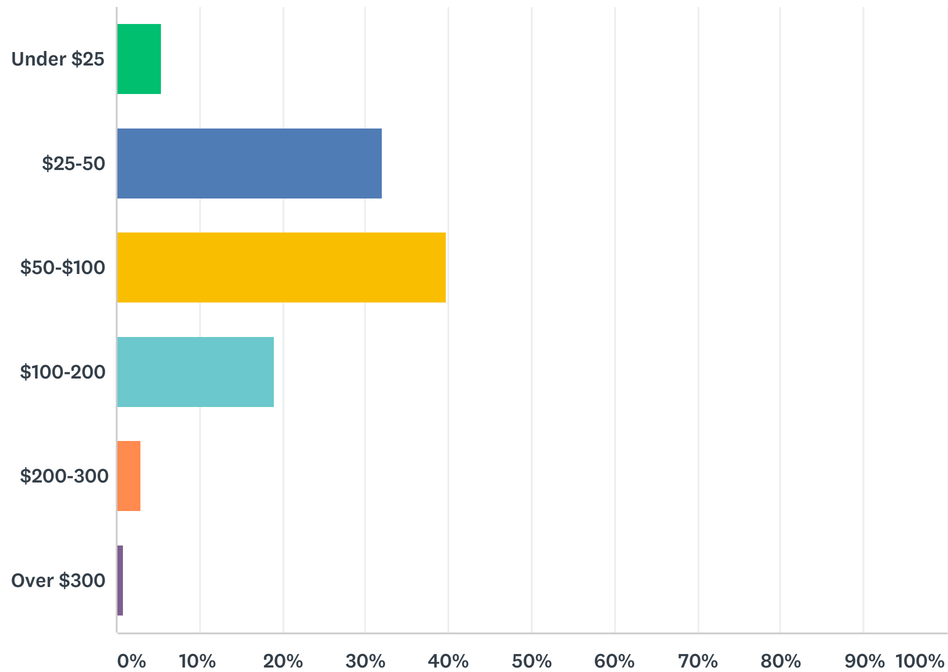
Answered: 2,800   Skipped: 207



ANSWER CHOICES	RESPONSES	
In the moment	3.50%	98
Does a couple of hours count as advance planning?	6.68%	187
1 or 2 days	21.18%	593
> 2 days in advance	15.04%	421
A week or so	28.64%	802
More than a week	24.96%	699
TOTAL		2,800

Q17 What is your average personal spend per outing?

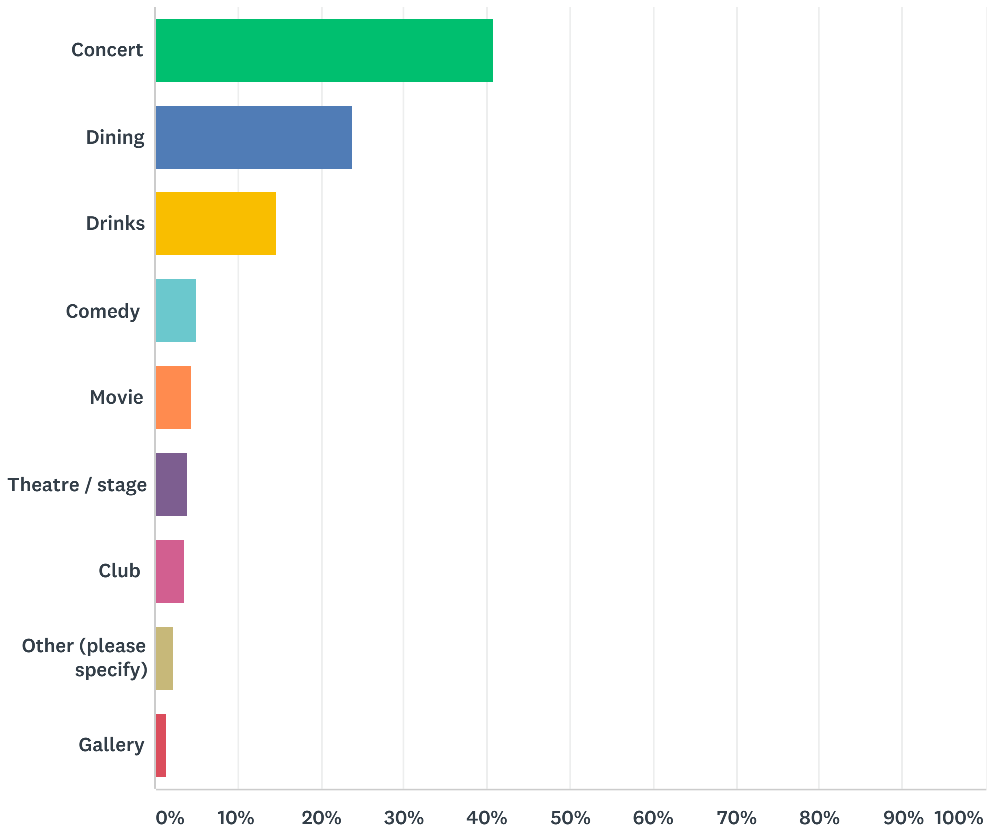
Answered: 2,802 Skipped: 205



ANSWER CHOICES	RESPONSES	
Under $25	5.53%	155
$25-50	31.98%	896
$50-$100	39.65%	1,111
$100-200	19.13%	536
$200-300	2.89%	81
Over $300	0.82%	23
TOTAL		2,802

Q18 Which of these activities would you spend up to $50 on?

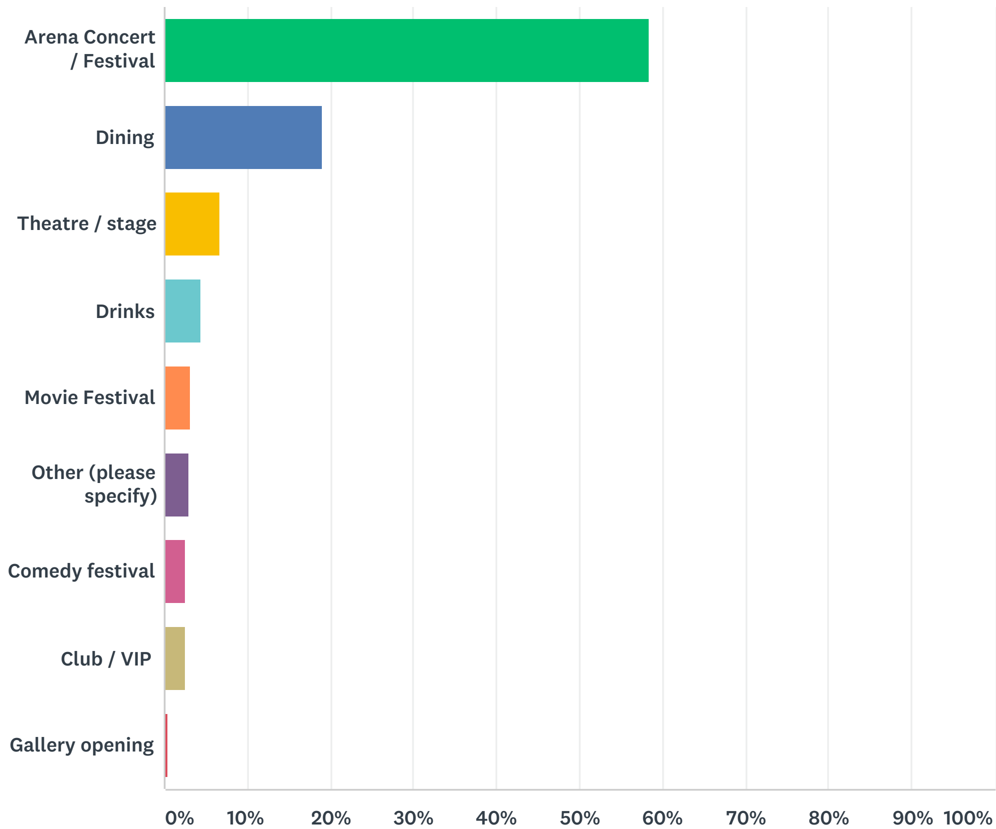
Answered: 2,808 Skipped: 199



ANSWER CHOICES	RESPONSES	
Concert	40.81%	1,146
Dining	23.86%	670
Drinks	14.57%	409
Comedy	5.06%	142
Movie	4.34%	122
Theatre / stage	3.99%	112
Club	3.63%	102
Other (please specify)	2.28%	64
Gallery	1.46%	41
TOTAL		2,808

Q19 Which of these activities would you spend up to $100 on?

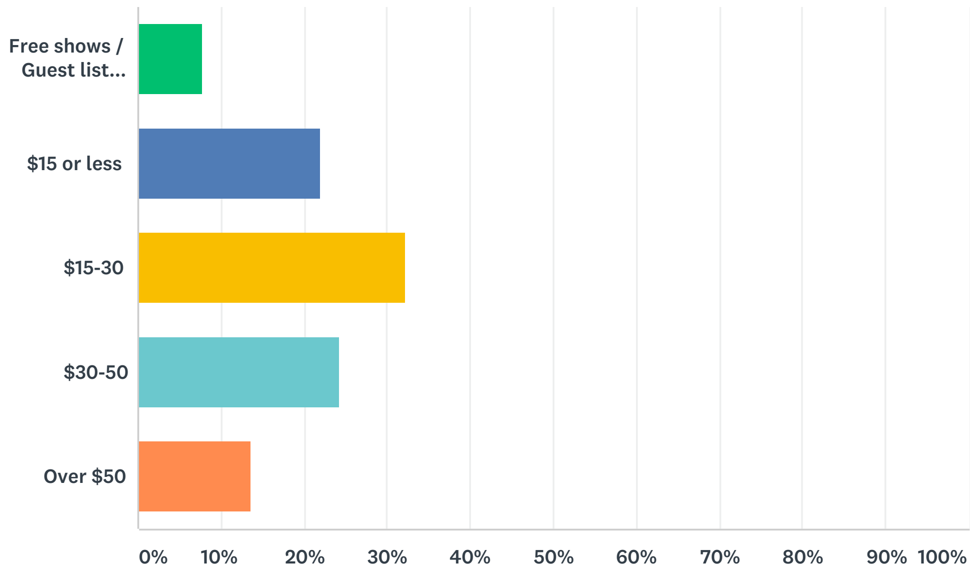
Answered: 2,796 Skipped: 211



ANSWER CHOICES	RESPONSES	
Arena Concert / Festival	58.40%	1,633
Dining	19.06%	533
Theatre / stage	6.65%	186
Drinks	4.33%	121
Movie Festival	3.15%	88
Other (please specify)	2.97%	83
Comedy festival	2.54%	71
Club / VIP	2.43%	68
Gallery opening	0.46%	13
TOTAL		2,796

Q20 What is the average price you pay for a single ticket / cover charge?

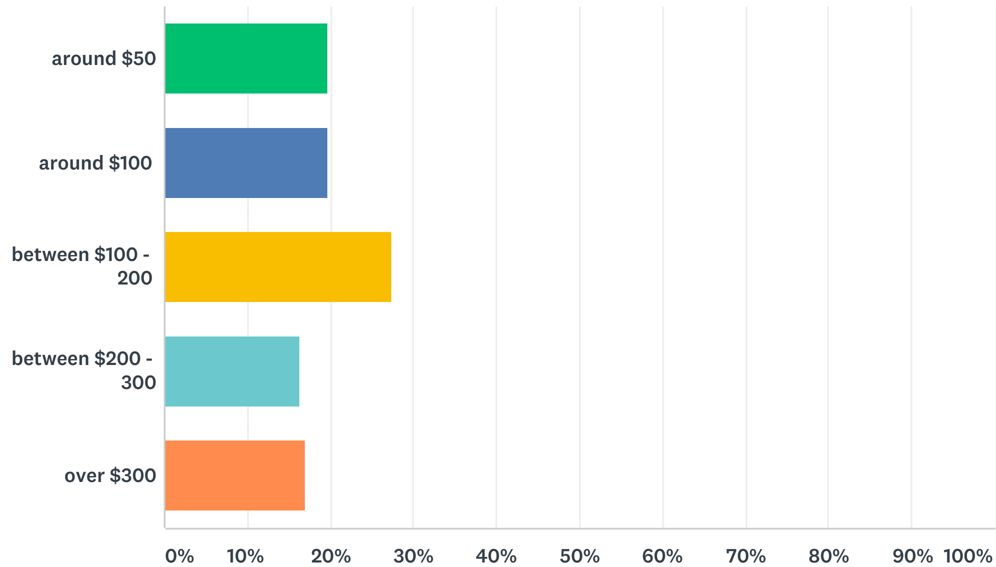
Answered: 2,803   Skipped: 204



ANSWER CHOICES	RESPONSES	
Free shows / Guest list only!	7.81%	219
$15 or less	21.98%	616
$15-30	32.22%	903
$30-50	24.30%	681
Over $50	13.70%	384
TOTAL		2,803

Q21 What is the most you paid for an event ticket in the last year (including multi day festivals)

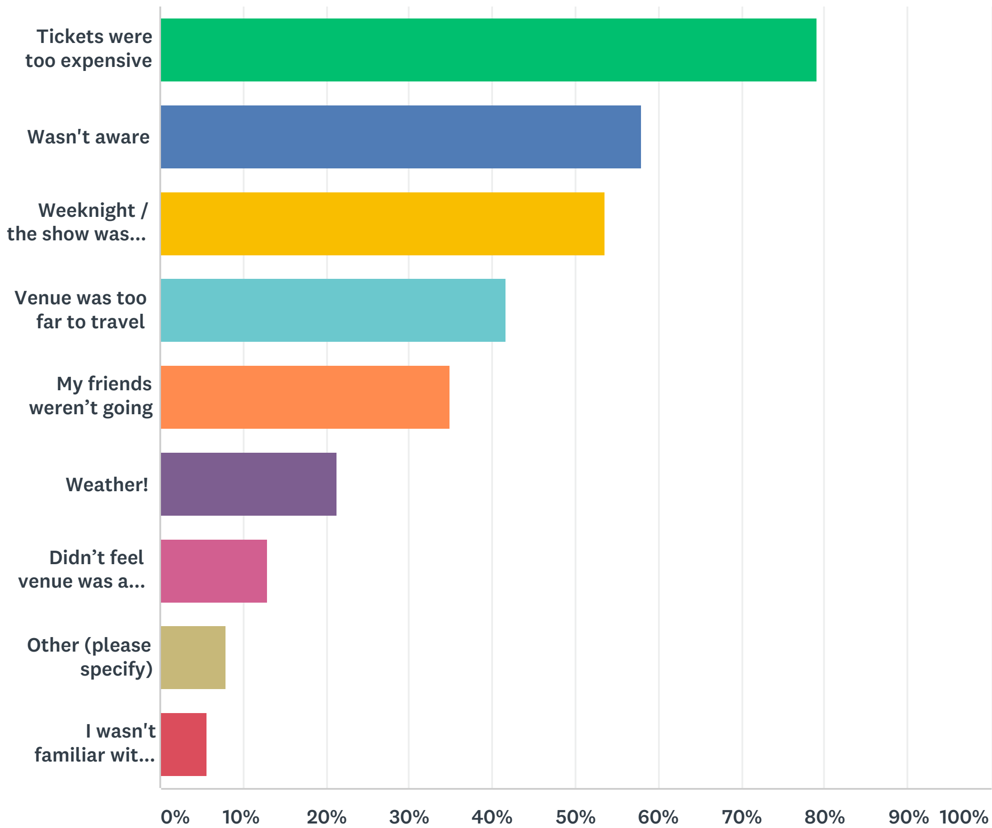
Answered: 2,803 Skipped: 204



ANSWER CHOICES	RESPONSES	
around $50	19.73%	553
around $100	19.62%	550
between $100 - 200	27.33%	766
between $200 - 300	16.38%	459
over $300	16.95%	475
TOTAL		2,803

Q22 What are the common reasons you wouldn't go out? (Pick all that apply)

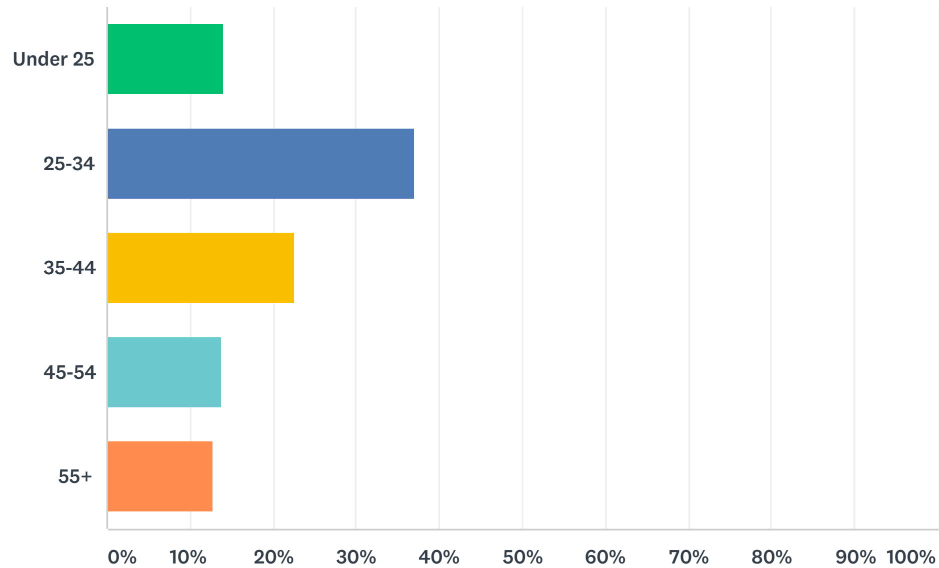
Answered: 2,813 Skipped: 194



ANSWER CHOICES	RESPONSES	
Tickets were too expensive	79.13%	2,226
Wasn't aware	57.87%	1,628
Weeknight / the show was too late	53.47%	1,504
Venue was too far to travel	41.59%	1,170
My friends weren't going	34.94%	983
Weather!	21.37%	601
Didn't feel venue was a safe space	12.90%	363
Other (please specify)	7.96%	224
I wasn't familiar with the venue	5.55%	156
Total Respondents: 2,813		

Q23 What is your age?

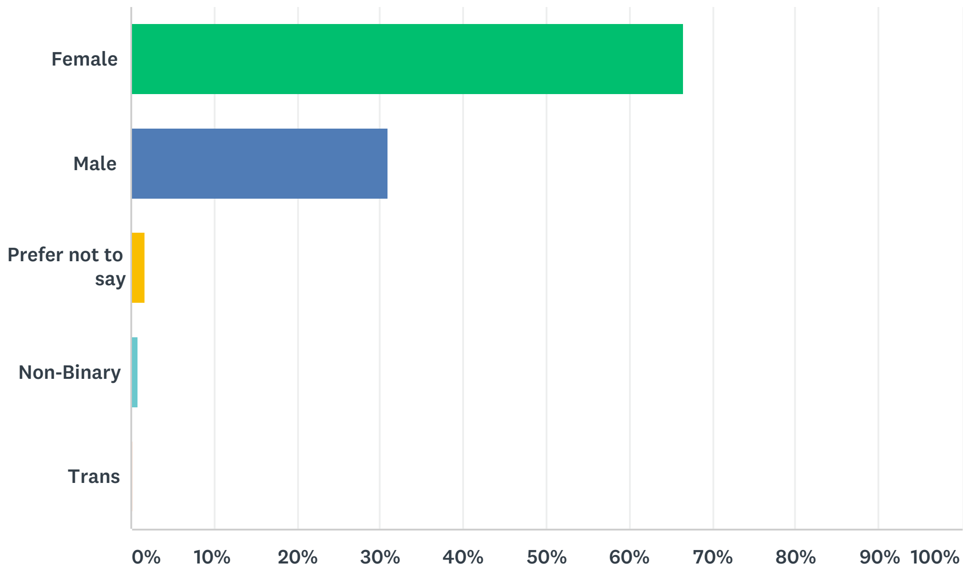
Answered: 2,808 Skipped: 199



ANSWER CHOICES	RESPONSES	
Under 25	13.96%	392
25-34	37.04%	1,040
35-44	22.51%	632
45-54	13.71%	385
55+	12.78%	359
TOTAL		2,808

Q24 What gender do you identify as?

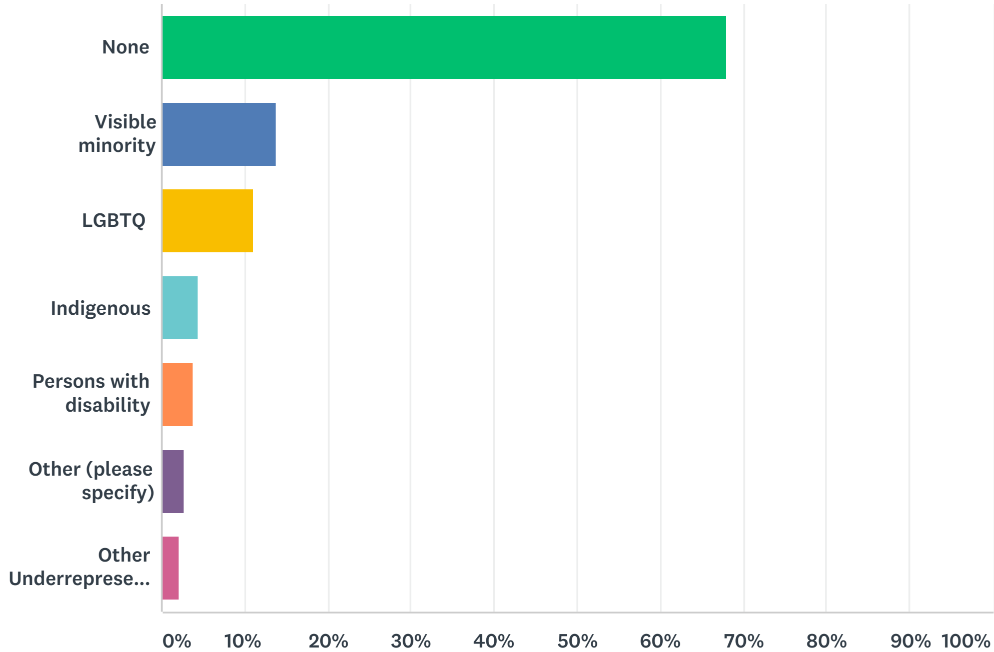
Answered: 2,808   Skipped: 199



ANSWER CHOICES	RESPONSES	
Female	66.49%	1,867
Male	30.91%	868
Prefer not to say	1.60%	45
Non-Binary	0.85%	24
Trans	0.14%	4
TOTAL		2,808

Q25 Do you identify as any of the following (select all that apply):

Answered: 2,721 Skipped: 286



ANSWER CHOICES	RESPONSES	
None	68.06%	1,852
Visible minority	13.71%	373
LGBTQ	11.06%	301
Indigenous	4.37%	119
Persons with disability	3.79%	103
Other (please specify)	2.76%	75
Other Underrepresented group (but don't want to identify)	2.09%	57
Total Respondents: 2,721		