DoBC CONSUMER INSIGHTS PROJECT

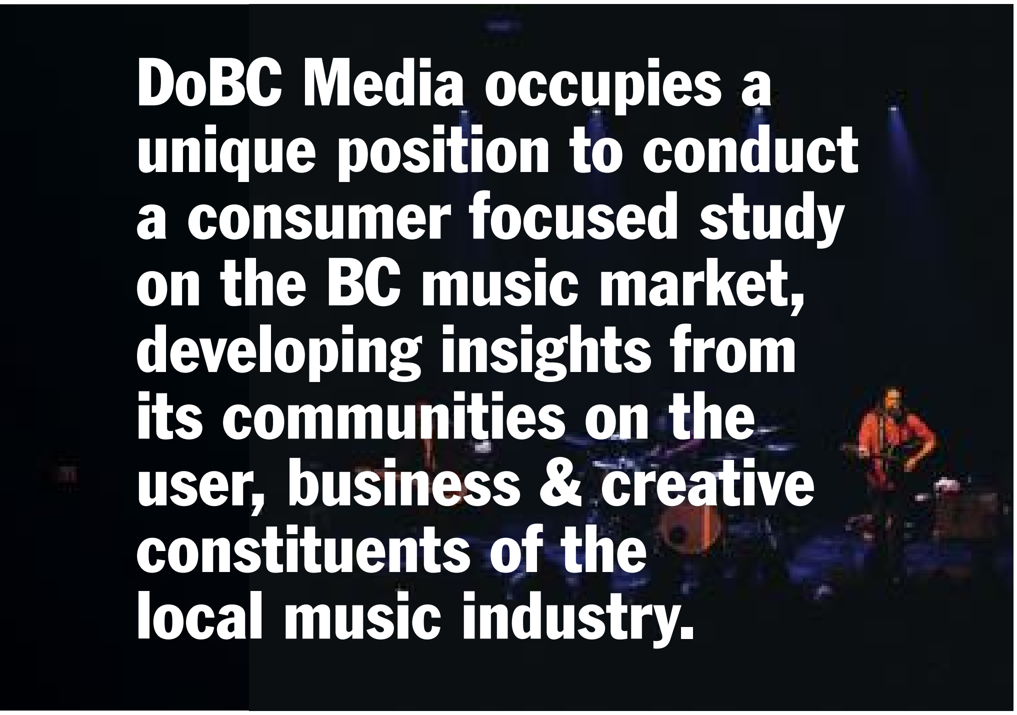
AnalysisWorks

do604

Do250

THE DoBC CONSUMER INSIGHTS PROJECT

examines the habits, trends and barriers BC consumers experience with respect to music and nightlife. Built from over 3,000 survey responses, this report offers a comprehensive look at the music landscape in BC from a consumer standpoint, drawing conclusions about future trends and identifying opportunities for growth.



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 & creative constituents of the local music industry.

PHOTOS THIS PAGE & P19
Photography by Ester Tothova
@bb.coconutbuns

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, arriving at the following areas of 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

The team then 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, and a greater than 95% completion rate for the survey, the team built a substantial set of data to analyze and develop a snapshot of BC consumer habits and trends.

Results have been cleaned, sorted cross-tabulated and analyzed developing a snapshot of BC consumers media consumption, music engagement and involvement by region, age, and gender.

This report summarizes the survey findings and highlights the greatest opportunity identified from the research. The full, technical report and underlying data is available by request.

THE PARTNERS
BEHIND THIS STUDY

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.

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.

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.

WHERE IS THIS INDUS-TRY GOING?

EVEN MORE
DIGITAL STREAMING, ONLINE MEDIA & SOCIAL

LEARNING ABOUT ARTISTS BY
WORD OF MOUTH, FACILITATED BY SOCIAL MEDIA

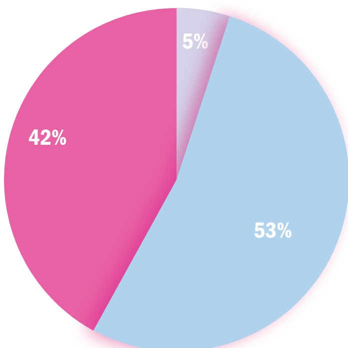
LIVE IS THE LAST FRONTIER
FOR MONETIZATION OF MUSIC (OTHER CONSUMPTION IS EXPECTED FOR FREE)

MEDIA CONSUMPTION IS INCREASINGLY DIGITAL

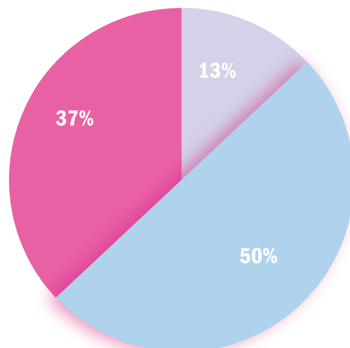
FREE AND 'FEELS LIKE FREE'
CONSUMPTION IS PREVALENT AMONGST CONSUMERS IN BRITISH COLUMBIA. DIGITAL MEDIA WILL CONTINUE TO GROW AS YOUNGER CONSUMERS COME OF AGE. THIS TREND IN MEDIA CONSUMPTION IS ESPECIALLY NOTEWORTHY COMPARING 'READ ONLINE' VS 'READ PRINT'

NONE SOME LOTS

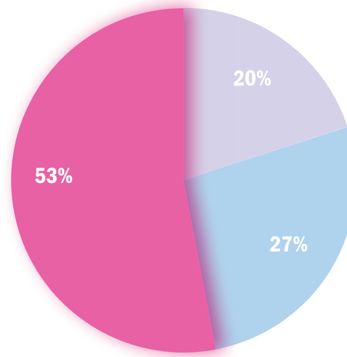
DIGITAL MEDIA



READ ONLINE
95% OF CONSUMERS ARE READING ONLINE OUTLETS

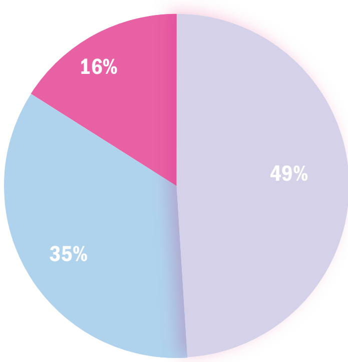


WATCHING YOUTUBE
87% OF CONSUMERS ARE STREAMING ON YOUTUBE

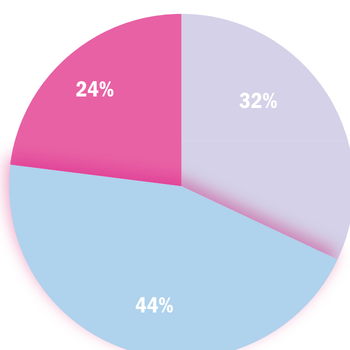


STREAMING MUSIC
80% ARE STREAMING MUSIC ONLINE

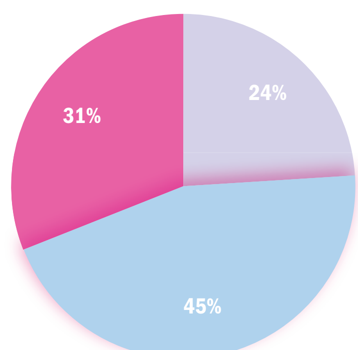
TRADITIONAL MEDIA



READ PRINT
MORE THAN HALF OF CONSUMERS UNDER 45 DO NOT READ PRINT*



WATCHING TV
38% OF CONSUMERS UNDER 35 REPORTED WATCHING NO TV



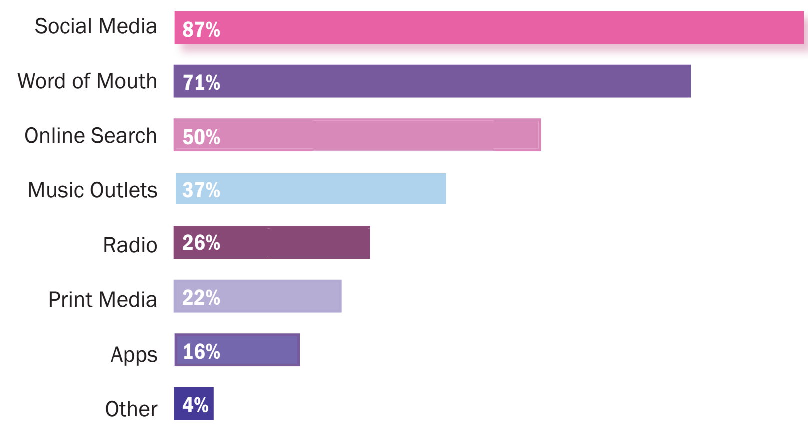
LISTENING TO RADIO
RADIO PENETRATION IS STRONGEST WITH 45+ :90% OF THIS DEMO LISTEN TO THE RADIO. 32% OF CONSUMERS UNDER 35 DO NOT LISTEN TO RADIO

DISCOVERY

LOOKING INTO SOCIAL MEDIA USE, ARTIST AND EVENT DISCOVERY WE ASKED CONSUMERS TO SHARE WHICH SOCIAL MEDIA PLATFORMS THEY USED, AND THEIR TOP 3 SOURCES OF DISCOVERY FOR MUSIC AND NON-MUSIC EVENTS.

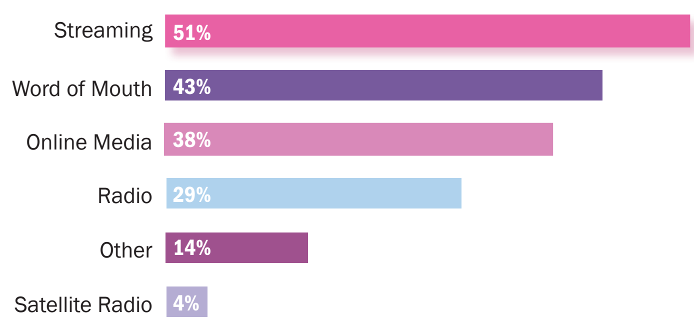
EVENT DISCOVERY

IS DRIVEN BY SOCIAL & WORD OF MOUTH FOLLOWED BY ONLINE SEARCH. ONLINE SEARCH PLAYS A LARGER ROLE IN THE DISCOVERY OF MUSIC EVENTS (61%) VS OTHER EVENTS (50%)



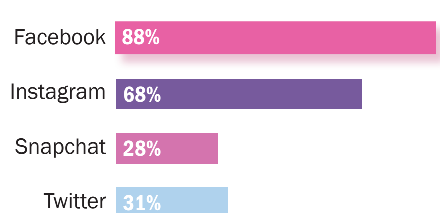
ARTIST DISCOVERY

IS PRIMARILY HAPPENING DIGITALLY: VIA STREAMING, WORD OF MOUTH (AMPLIFIED BY SOCIAL MEDIA) AND ONLINE MEDIA



SOCIAL MEDIA USE IS HIGHER THAN EVER

AND INCREASING AS THE POPULATION AGES



WHO IS THE TARGET AUDIENCE?

AGE 25–34
POST UNIVERSITY, PRE-KIDS

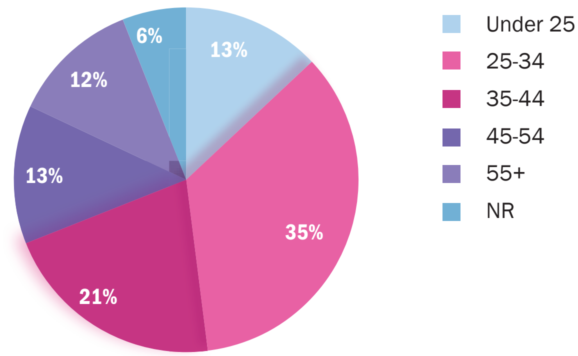
AVERAGE REPORTED SPEND
$50–$200
59% OF THIS DEMO SPEND AT LEAST $50 A NIGHT

1/3 REPORT
GOING OUT AT LEAST ONCE A WEEK

MOST
LIVE WITHIN 30 MINUTES
OF VENUE

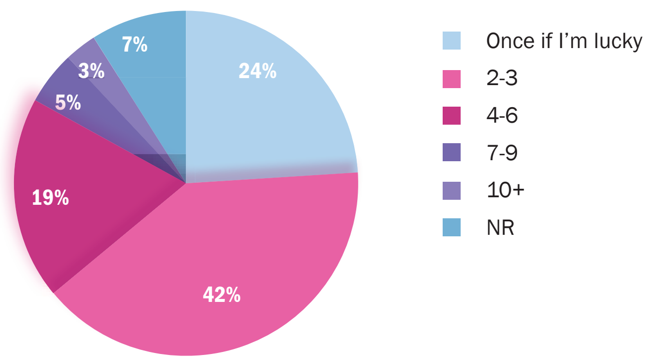
AGE OF RESPONDENTS

MORE THAN 1/3 OF RESPONDENTS WERE 25-34, 56% WERE BETWEEN 25-44



NUMBER OF NIGHTS OUT PER MONTH

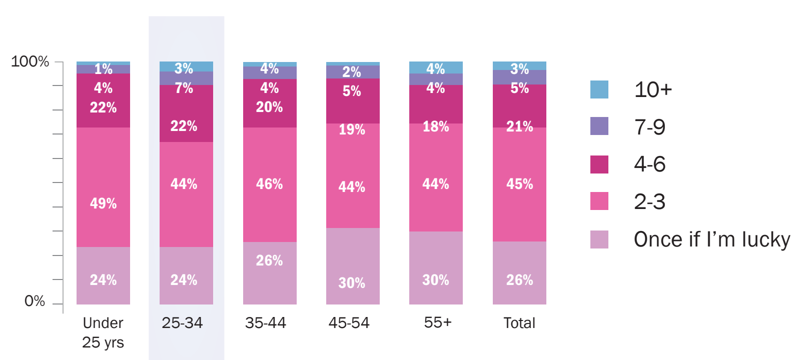
MORE THAN 60% OF RESPONDENTS GO OUT BTW 2-6 TIMES/MONTH



NIGHTS OUT X AGE:

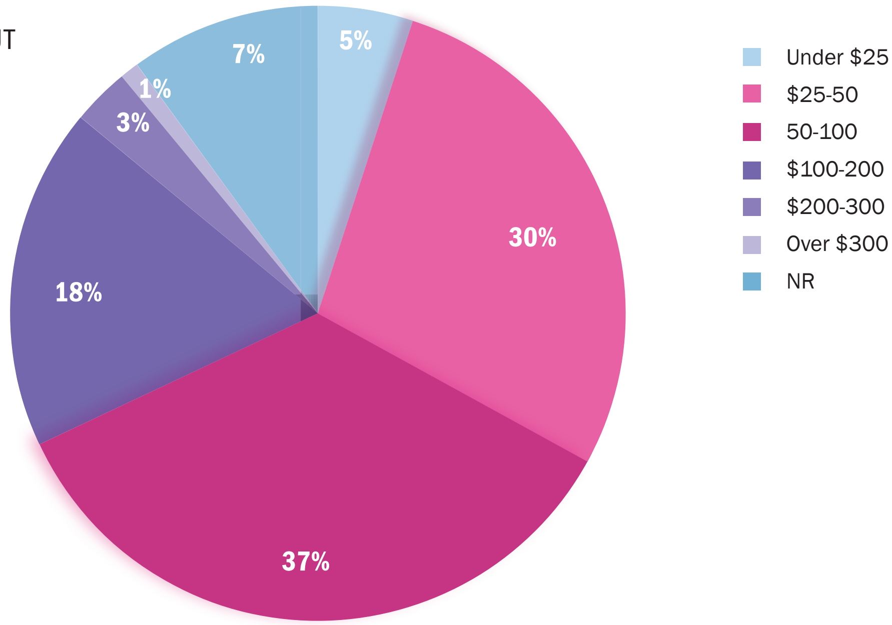
25-34 IS THE MOST ACTIVE DEMO FOR NIGHTS OUT / MONTH

76% OF RESPONDENTS 25-34 GO OUT AT LEAST TWICE A MONTH

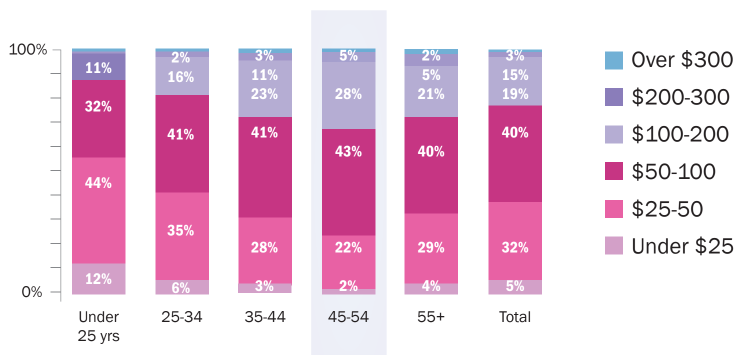


AVERAGE SPEND / NIGHT OUT:
2/3 OF RESPONDENTS SPEND BETWEEN $25-$100 PER NIGHT OUT

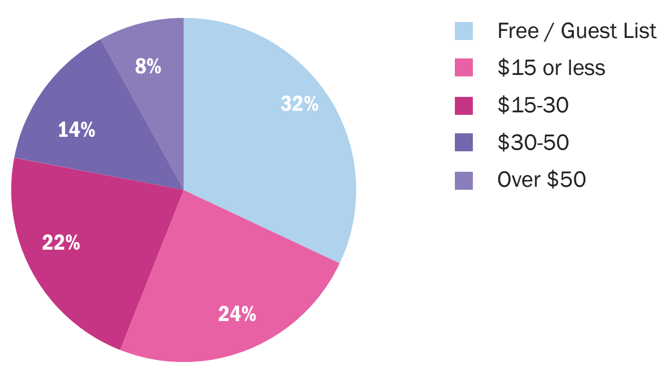
AVERAGE SPEND: $73/ NIGHT OUT



AVERAGE SPEND PER NIGHT X AGE:
45-54 SPEND THE MOST PER NIGHTLY

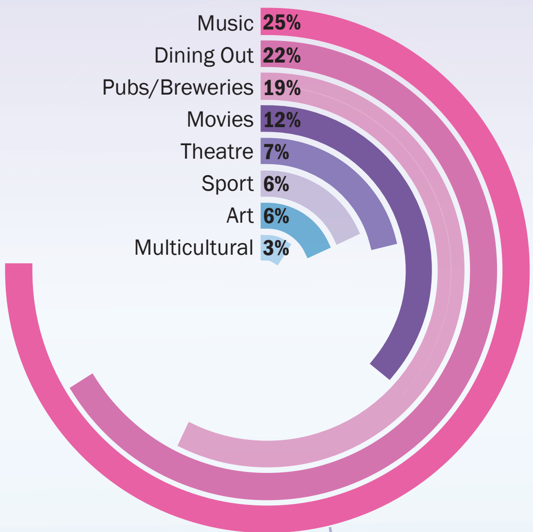


AVERAGE COVER / TICKET PRICE
AVERAGE TICKET PRICE: $27

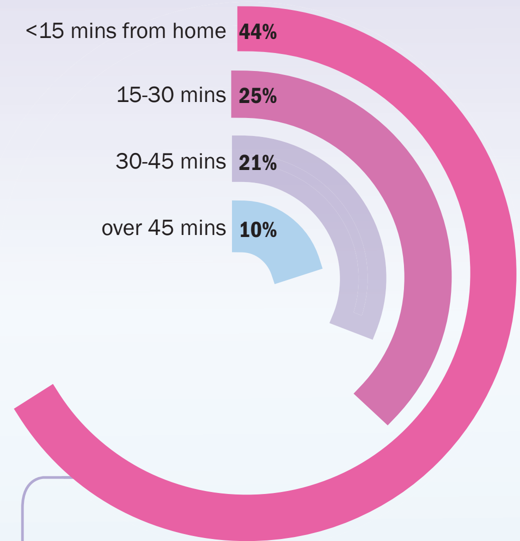


For more on local music events, entertainment and nightlife in Vancouver and Victoria, visit Do604.com and Do250.com

EVENT TYPE ('MOST OF THE EVENTS I ATTEND ARE')

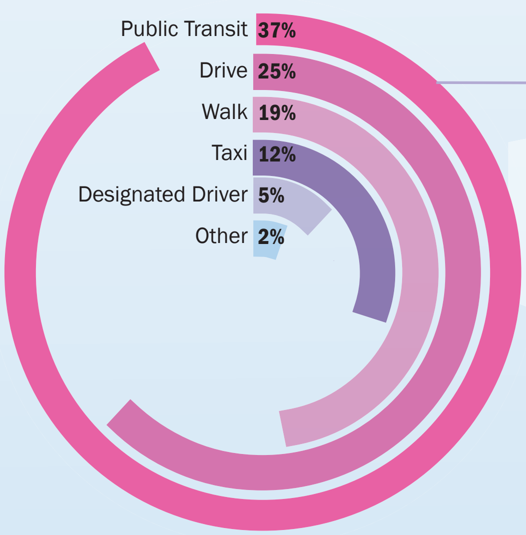


AVERAGE DISTANCE TRAVELLED TO GO OUT



NEARLY 70% OF RESPONDENTS ARE WITHIN 30 MINUTES OF VENUE

HOW CONSUMERS ARE GETTING TO EVENTS



WHAT STOPS PEOPLE FROM GOING OUT?

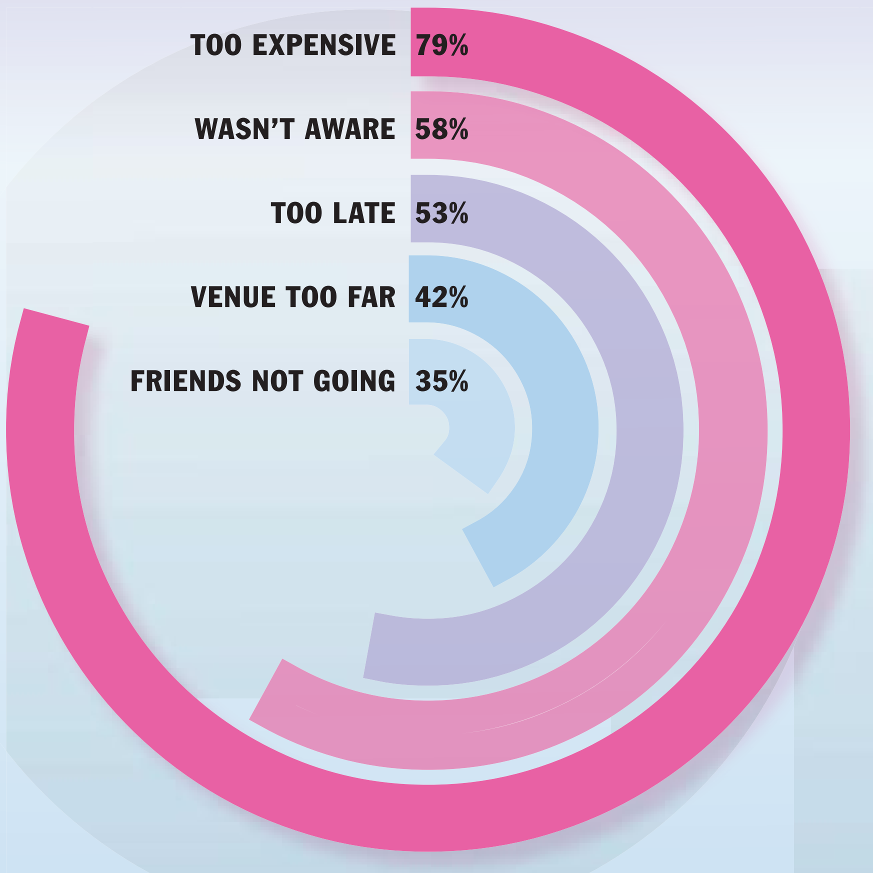
PRICE!
79% SAY TICKETS ARE TOO EXPENSIVE

AWARENESS
58% 'WEREN'T AWARE OF EVENT'

SHOW WAS TOO LATE
53% SAID THE SHOW WAS TOO LATE

BARRIER$ TO GOING OUT

WE ASKED CONSUMERS TO IDENTIFY THE FACTORS THAT TYPICALLY KEEP THEM FROM GOING OUT. THE GRAPH BELOW ILLUSTRATES **THE TOP 5 REASONS** ACROSS ALL RESPONSES. WRITE-IN RESPONSES (8% OF TOTAL) ARE ALSO SHOWN ON PAGE 14.



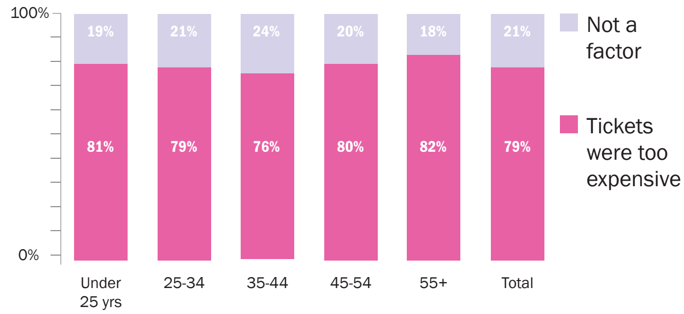
OVERALL:
79% SAID TICKETS WERE TOO EXPENSIVE
58% SAID THEY WEREN'T AWARE OF EVENTS THEY WOULD HAVE ATTENDED
53% SAID THE SHOW TIME / SET TIME WAS TOO LATE

SECONDARY REASONS GIVEN
WEATHER 21%
DIDN'T FEEL VENUE WAS A SAFE SPACE 13%
OTHER 8%
WASN'T FAMILIAR WITH THE VENUE 6%

BARRIER$ TO GOING OUT

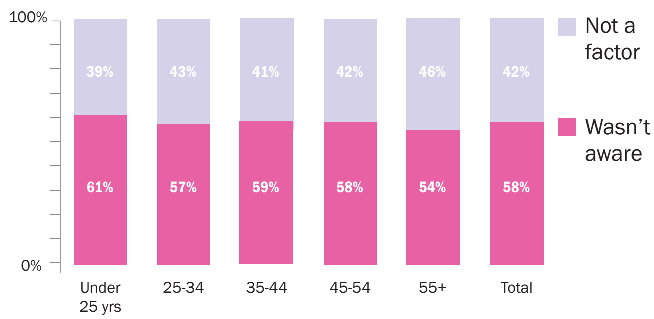
TICKETS TOO MUCH X AGE

PRICE WAS THE NUMBER ONE BARRIER ACROSS ALL DEMOS.



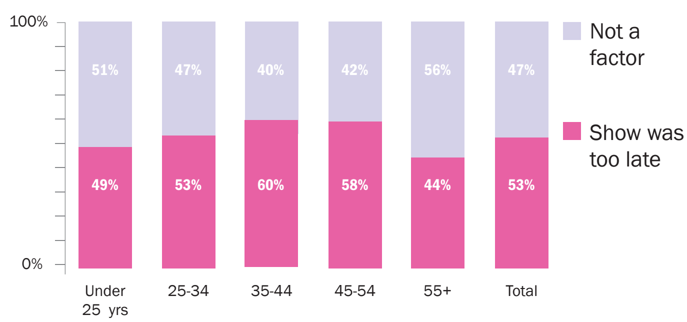
WASN'T AWARE X AGE

AWARENESS OF EVENTS WAS REPORTED AS A MAJOR BARRIER CONSISTENTLY ACROSS ALL DEMOS.



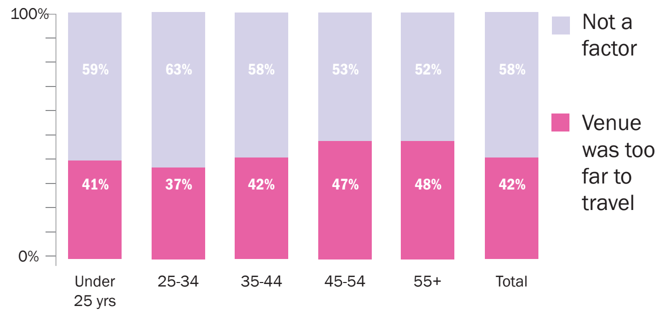
SHOW TOO LATE X AGE

SHOW TIMING WAS A SIGNIFICANT FACTOR FOR MOST DEMOS, IN PARTICULAR 35-44, AND 45-54



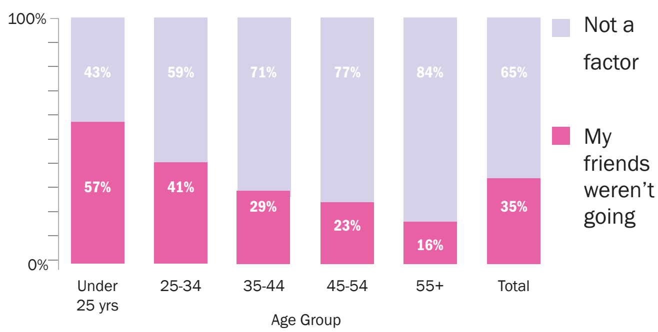
VENUE TOO FAR X AGE

VENUE DISTANCE WAS A SIGNIFICANT FACTOR FOR MOST DEMOS, LESS SIGNIFICANTLY FOR THE KEY DEMO OF 25-34



FRIENDS WEREN'T GOING X AGE

SOCIAL FACTORS / FRIENDS WAS A MUCH GREATER FACTOR FOR YOUNGER DEMOS THAN OLDER.



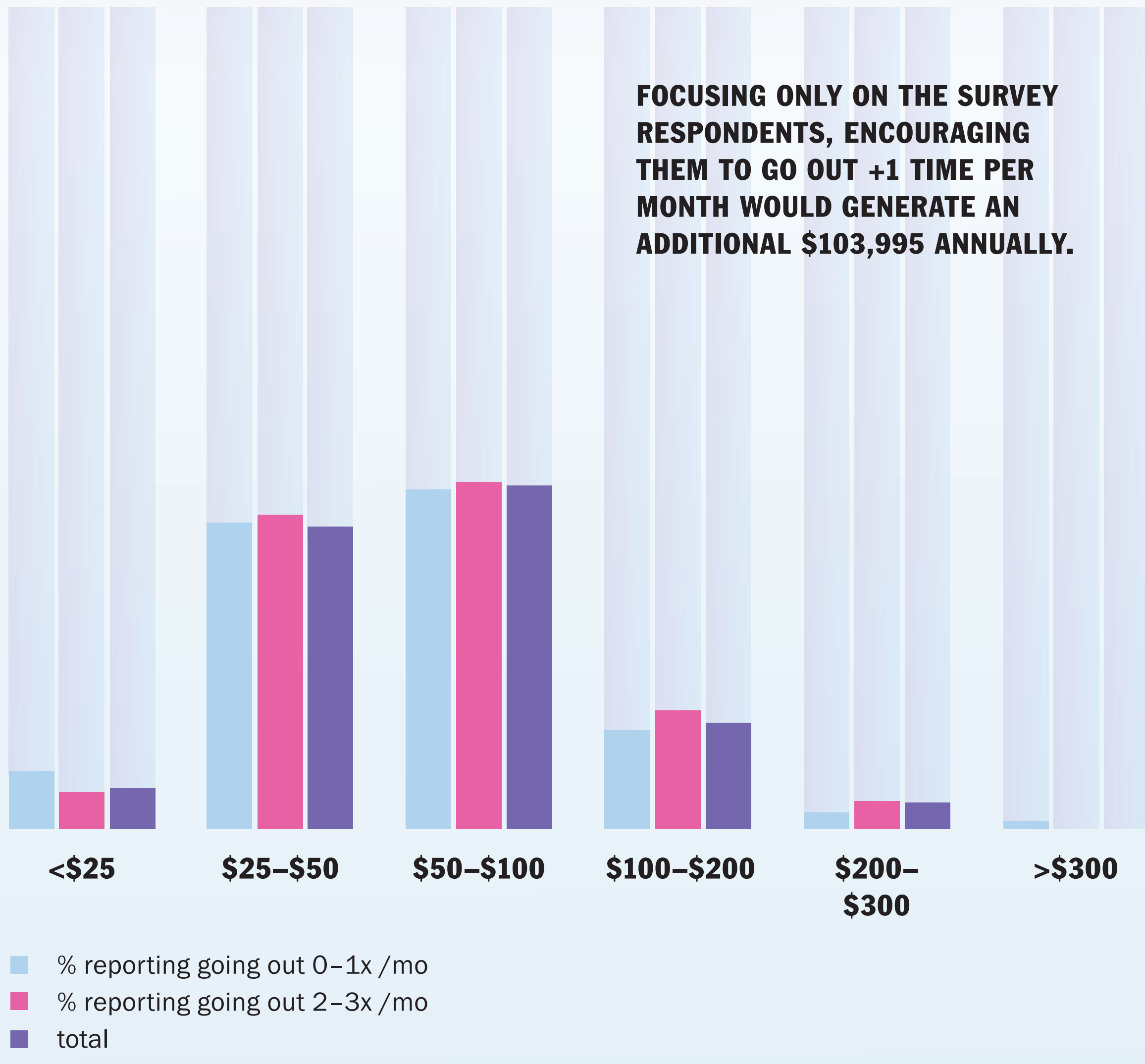
'WRITE-IN RESPONSES (>8% OF TOTAL RESPONSES)

NO BABYSITTER
WORKING
THE VENUE
DIDN'T FEEL LIKE IT
TOO EXPENSIVE
TOO TIRED
LACK OF TRANSIT/ TAXIS/NO UBER

OTHER PLANS/SPORTS
WORKING NEXT AM
TICKETMASTER/BOTS
OTHER PLANS
TOO BUSY
DISLIKE CROWDS
SOLD OUT
LACK OF GOOD EVENTS

CURRENT PICTURE 25–34 YEAR OLDS:

TIMES OUT PER MONTH
AND AVERAGE SPEND
FROM FROM >1K RESPONDENTS



42% REPORT SPENDING BETWEEN $50-100/NIGHT ($72.95 AVG SPEND)

66% GO OUT BETWEEN 2-6 TIMES PER MONTH HIGHEST PROPORTION OF CONSUMERS GOING OUT 4+ TIMES/MONTH

ESTIMATING THE OPPORTUNITY

WHAT IF OUR TARGET MARKET (25-34 YEAR OLDS) WENT OUT ONE MORE TIME PER MONTH?
(IE: INSTEAD OF ONCE A MONTH - TWICE, ETC)

LET'S MAKE THIS MORE DOABLE
WHAT IF ONLY 30% WENT OUT ONE MORE TIME PER MONTH?
WHAT IF ONLY 50% OF PEOPLE IN THIS AGE GROUP GO OUT AT ALL?

1,000 RESPONSES IN THIS AGE GROUP

400 SAID THEY WOULD GO OUT IF THEY WERE **MORE AWARE**

WHICH IS
60 MORE OUTINGS PER MONTH
(400 X 30% X 50%)

AT **$73 PER NIGHT** AVERAGE SPEND

$52,560 / YEAR
FOR OUR RESPONDENTS

SCALE UP FACTOR:
1,036 survey respondents btw 25-24
Vancouver/Victoria 25-34 population: 141,785
(2016 census) | Scale Up Factor: 137

$7.2M / YEAR IN VANCOUVER & VICTORIA

OPPORTU-NITY TO IMPROVE IS WORTH $7M

INCREASE AWARENESS
AMONG THE KEY 25–34 YEAR OLD DEMOGRAPHIC AMONG THE INDUSTRY—INCREASE ENGAGEMENT

GET THE DEMOGRAPHIC
OUT +1 TIME/ MONTH

A +30% INCREASE, AT AN AVERAGE SPEND OF $73/NIGHT,
IS WORTH >$7M ADDITIONAL REVENUE IN VANCOUVER AND VICTORIA

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 many suggestions come to mind regarding event marketing and promotion.

Price was shown to be the top barrier to going out, promoters may consider offering variable pricing and time sensitive deals helping them 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 - similar to suggestions on approaching the challenges of pricing and awareness.

MUSICIANS & MANAGERS

Streaming services and digital media have overtaken traditional media as the primary method of listening and discovery of music. All indications are that this trend will continue as consumers age - with less-digitally inclined 44-55 y/o's and 55+ becoming 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.

CONTACT US
WE ARE SUPER FRIENDLY.

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*Detailed report and complete survey results available by request.

COVER AND BACK PHOTO
Photography by Christopher Edmonstone
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