B.C. Patron Insights

September 11, 2020

GVPTa

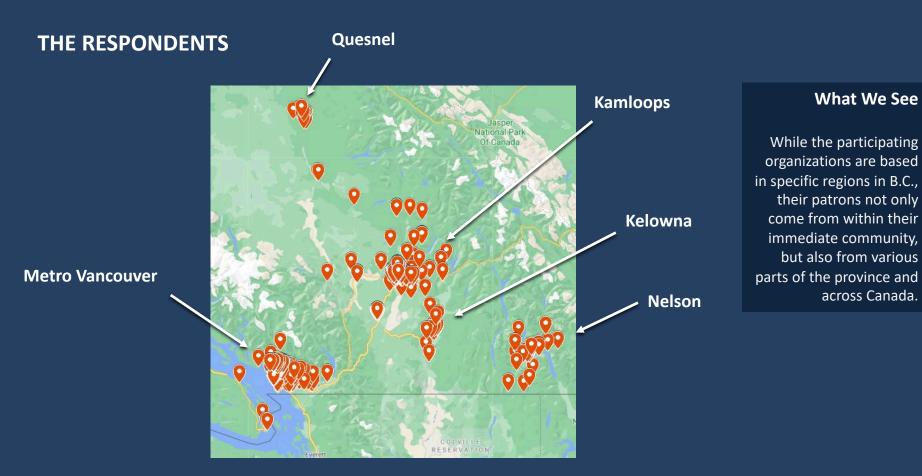
Questions may be directed to GVPTA executive director, Kenji Maeda at kenji@gvpta.ca or 604-608-6799.

At GVPTA, we acknowledge that our organization is located on the unceded territories of the Coast Salish peoples of the x^wməϑkwəỷəm (Musqueam), Skwxwú7mesh (Squamish), and Səİílwətaɬ (Tsleil-Waututh) Nations. This report includes data collected between July 21 and September 8, 2020, through the GVPTA **B.C. Patron Insights** program – a decentralized data collection strategy.

Data in this report represents responses from 2,189 patrons surveyed by 11 participating organizations across British Columbia, including those based in Metro Vancouver, Kamloops, Kelowna, Nelson, and Quesnel.

We recognize that accurately measuring patron sentiment will continue to be a moving target as new realities emerge for individuals, communities, and across the province.

To learn more about **B.C. Patron Insights** and to have your organization participate, visit www.gvpta.ca.

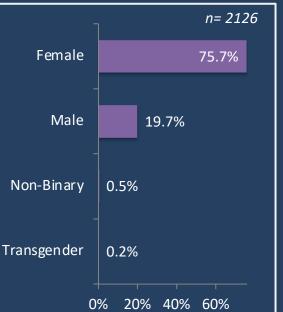


THE PATRONS

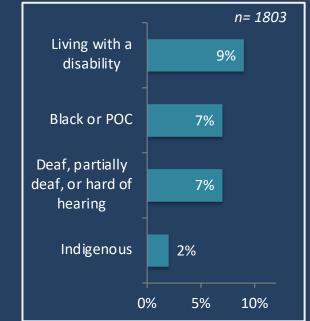
AGE



GENDER

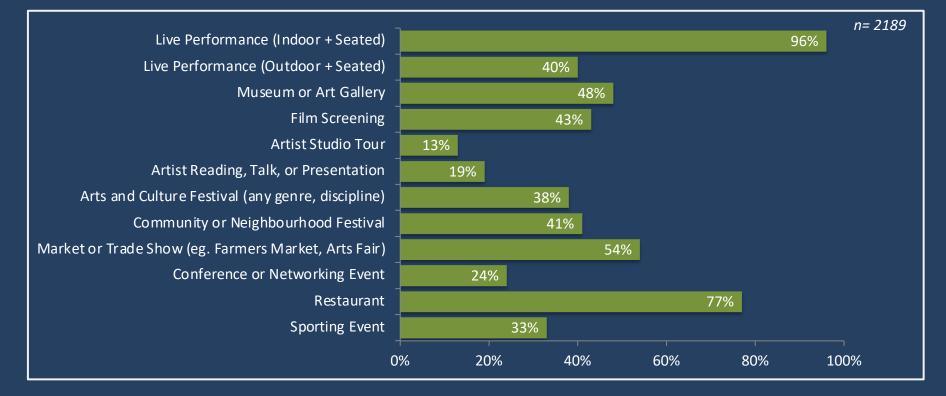


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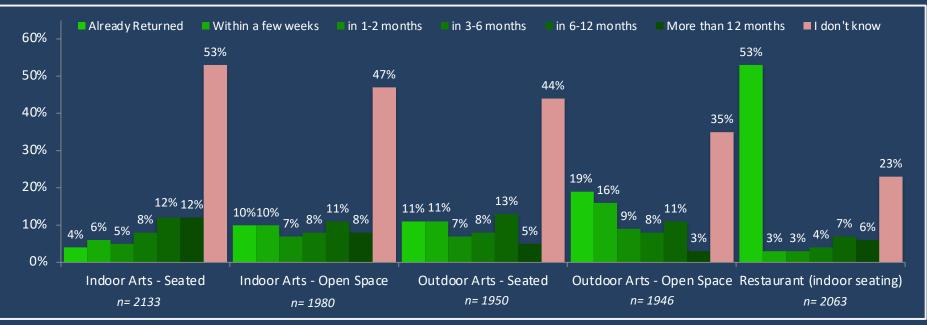


THEIR IN-PERSON ACTIVITIES IN THE 12 MONTHS BEFORE THE COVID-19 OUTBREAK

between March 2019 and February 2020



WHEN DO PATRONS INTEND TO RETURN TO THESE ACTIVITIES OR SPACES?



What We See

While **53%** of patrons have already returned to indoor dining in restaurants, their intention to return to indoor arts events and spaces within the next 2 months (including "already returned") range from **15%** (indoor, seated) to **27%** (indoor, open space). This may be due to both individual comfort to return, but also lack of in-person programming and activities. Many patrons are unsure when they'll return to arts events.

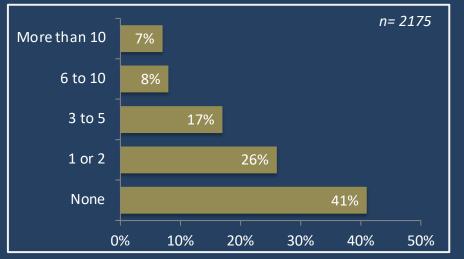
STRATEGIES AND MEASURES WHICH WILL MAKE PATRONS MORE LIKELY TO ATTEND A PERFORMANCE, EVENT, OR ACTIVITY

Availability of a vaccine	70% 14%
Physically-distanced seating & empty seats between groups	Much More 53% Somewhat More 33%
Mandatory masks for visitors/audience	49% 33%
Tickets cancellable and refundable	49% 30%
Mandatory masks or protective barriers for staff	47% 34%
Increased cleaning and disinfection of all touch surfaces	Much More 44% Somewhat More 37%
Hand washing or hand sanitizer stations	43% 36%
Controlled and staggered entry into, and exit from, the venue	40% 41%
Broad testing and contact tracing capacities	33% 38%
Contactless payment	Much More 33% Somewhat More 33%
No intermission	21% 27%
0	0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

What We See

At the top of the list, the *availability of a vaccine* will make **70%** of patrons **much more likely** to attend an arts event. While most measures would help **79%** (or more) of patrons feel **somewhat or much more likely**, the least important measure was *no intermission* at **48%**.

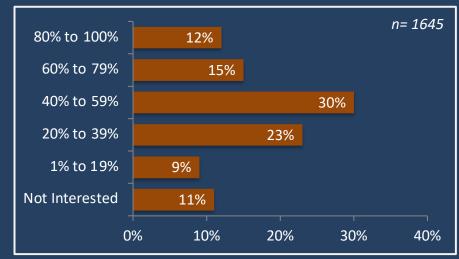
OF DIGITAL ARTS EVENTS, PEFORMANCES, OR VIRTUAL TOURS ATTENDED SINCE MID-MARCH



What We See

58% have attended at least one digital/online arts and culture event, performance, or activity. The most engaged patrons who participated in 6 or more accounted for **15%** of respondents.

% OF TICKET PRICE PATRONS ARE WILLING TO PAY FOR SAME LIVE PERFORMANCE ONLINE



What We See

27% of patrons are willing to pay 60% or more of the regular ticket price for the same live performance online. A further 30% of patrons would pay 40-59% of the regular ticket price. Only 11% of respondents are not interested in buying a ticket.

OTHER TYPES OF SUPPORT PATRONS ARE (UN)LIKELY TO DO

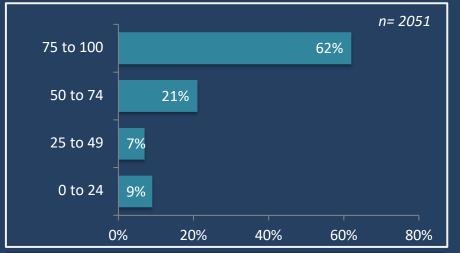
Very Li	ikely Sor	mewhat	Likely 🔳 Not Sure	s S omewhat	Unlikely	v 🗖 Very	Unlikely
Donate the value of unused tickets that you've previously purchased	24%		6 22%		1	1%	16%
Temporarily pay higher ticket prices, until programming and venues can operate at full capacity	14%		34%	23%		15%	14%
Buy vouchers or certificates redeemable for future programs	13%	13% 36%		28%		12%	11%
Buy tickets to live-streamed programs you can watch at home	13%	% 31%		21%	13%	2	2%
Make a special donation to a relief fund to benefit organizations like ours	11% 35%		35%	31%		11%	12%
Pay a small monthly subscription for access to pre-recorded digital programs that we curate for you	6%	21%	28%	17%		289	6
0	1%	20%	40%	60%		80%	100%

What We See

24% of patrons are *very likely* to donate the value of unused ticket they previously purchased. At least **44%** of respondents indicated they were *somewhat or very likely* to provide support in 5 of the 6 categories, however the strongest reaction toward the *unlikely* **(45%)** was the idea of a monthly subscription for pre-recorded digital programs.

LEVEL OF EAGERNESS, INTEREST, OR EXCITEMENT TO RETURN TO IN-PERSON PROGRAMMING AND ACTIVITIES

1 = Not Eager | 100 = Very Eager

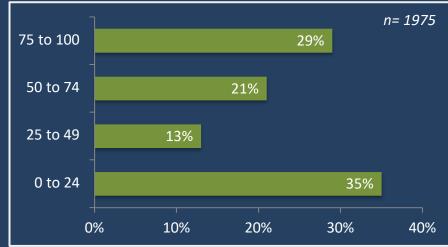


What We See

The majority **(62%)** of patrons reported a high level of eagerness and interest to return to in-person programming.

LEVEL OF COMFORT TO <u>IMMEDIATELY</u> RETURN TO IN-PERSON PROGRAMMING AND ACTIVITIES (ASSUMING PUBLIC HEALTH GUIDELINES ARE FOLLOWED)

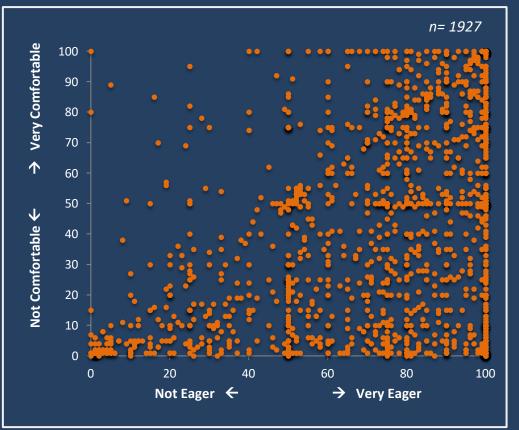
1 = Not Comfortable | 100 = Very Comfortable



What We See

29% of patrons reports a high level of comfort returning immediately, assuming public health guidelines are followed, while **35%** feel very uncomfortable returning immdiately.

PATRON'S LEVEL OF EAGERNESS AND COMFORT TO RETURN TO IN-PERSON ACTIVITIES





What We See

The charts represent the respondents' level of eagerness in relation to their level of comfort.

PATRONS' LEVEL OF EAGERNESS AND COMFORT TO RETURN TO IN-PERSON ACTIVITIES (BASED ON THE ORGANIZATION'S LOCATION)

Metro Vancouver Metro Vancouver What We See organizations outside of 1% 2% 25% 1% 3% 38% Metro Vancouver are Patrons are evenly split: more ready to return. 25% are eager and 1% 6% 15% 1% 6% 18% *comfortable* to return, **38%** are both *eager* and comfortable, while Comfort and equally 25% are Comfort **17%** are *eager and NOT* eager and NOT 15% 12% 25% 9% 9% 17% comfortable. *comfortable* to return. Eager Eager

Organizations

Outside of

What We See

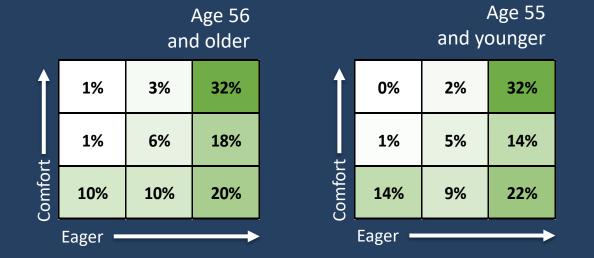
Patrons of

What We See

Organizations in

The difference in comfort levels may be correlated with the number of COVID-19 cases in and around communities where the surveying organizations are located.

PATRONS' LEVEL OF EAGERNESS AND COMFORT TO RETURN TO IN-PERSON ACTIVITIES (BASED ON THE RESPONDENT'S AGE)



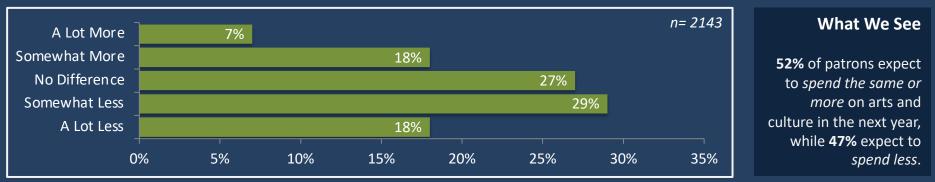
What We See

There were no significant differences in their level of comfort and eagerness when comparing all respondents *56 years and older* with those who are *55 and younger*.

PATRONS IDENTIFIED: IN THE PAST YEAR...



EXPECTED SPENDING ON ARTS AND CULTURE OVER THE NEXT 12 MONTHS



PATRONS BELIEVE ARTS AND CULTURE STRENGTHENS...

							Strongly	Agree	Somew	hat Agree	
n= 2156	Quality of Life								81%	17%	
2138	Mental Health and Wellness							789	%	19%	
2130	Civic Pride						62%		28	8%	
2158	Tourism					5	9%		31	.%	
2132	Economic Recovery					54%			34%	5	
2115	Business Community				489	%			34%		
	+ 09	% 10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

What We See

All patrons agree that arts and culture strengthens the community in many ways, including *quality of life* (98%) and *mental health and wellness* (97%).

PATRONS' TRAVEL FREQUENCY IN 2019

n=		No				1 c	or 2	3 to 5	6 to 10	Mo	re than 10		
1521	Outside your Home Region, but within B.C.	7%		31%				37%		15%	10%		
1379	Within Canada (outside B.C.)	39%					43%				15% <mark>3%</mark>		
1346	Within the U.S.A.	42%					39%				% 3%		
1385	Internationally, outside of U.S.A.	48%					43%				7%		
	0)%	10%	20%	30%	40%	50%	60%	70%	80% 9	0% 100%		

EXPECTED TRAVEL IN THE NEXT 18 MONTHS

n=		_			Decrea	se Travel	No Cha	nge	Increase	Travel	•	don't know	
1580	Outside your Home Region, but within B.C.		3	3%			28%		24%			16%	
1544	Within Canada (outside B.C.)		42%					6	12%			21%	
1533	Within the U.S.A.		61%						20%			16%	
1532	Internationally, outside of U.S.A.		56%						19%	5%	2	0%	
	(0%	10%	20%	30%	40%	50%	60%	70%	80%	% 9	0% 100	0%

What We See

Generally respondents expect to *travel less* over the next 18 months, however **24%** expect to *travel more within the province*.

EXPECTED TRAVEL (of those that traveled <u>at least once</u> in 2019 for the category)

n=	٦		Decrease Travel	No Change	Increase	Travel	🗖 I don't kno	w
1398	Outside your Home Region, but within B.C.	34%		28%	2	4%	14%	
837	Within Canada (outside B.C.)		55%		19%	11%	15%	
771	Within the U.S.A.		4%	13%				
713	Internationally, outside of U.S.A.		71%			8% <mark>4%</mark>	17%	
	09	% 20%	6 40	% 6	0%	80%		100%

What We See

Of those that traveled <u>at least once</u> in the category, the most *significant decrease* expected in travel is *to the U.S.A.* (81%). 24% (who traveled <u>at least once</u>) and 20% (who <u>did not travel</u> *outside their home region*) expect to *increase* their travel *within the province*.

EXPECTED TRAVEL (of those that indicated <u>NO</u> travel in 2019 for the category)

n=	_		I	Decrease Trave	I N	o Change 📃 In	crease Trave	el 📃 I don't ki	now
113	Outside your Home Region, but within B.C.	11%		33%		20%	319		
527	Within Canada (outside B.C.)	24%		44%			14% 27%		
560	Within the U.S.A.		35%			36%	3	% 18%	
650	Internationally, outside of U.S.A.		39%			38%	6%	22%	
	0'	%	20%	, 5 2	40%	60%	8	30%	100%