B.C. Patron Insights

September 11, 2020

Produced by

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 xʷməθkwəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and Səl̓ílwətaɬ (Tsleil-Waututh) Nations.

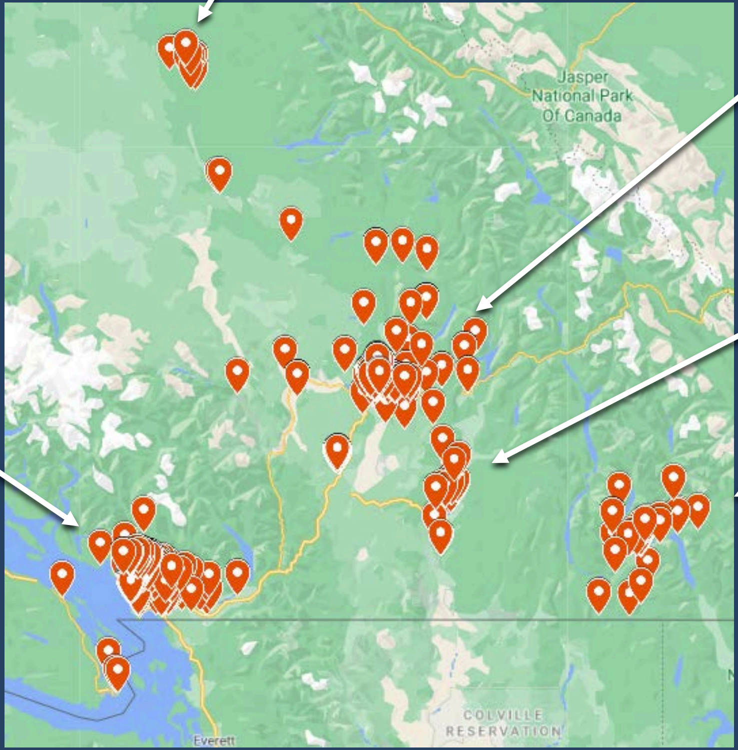
This report includes data collected between July 21 and September 8, 2020, through the GVPTA **B.C. Patron Insights** program – a decentralized data collection strategy.

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 RESPONDENTS

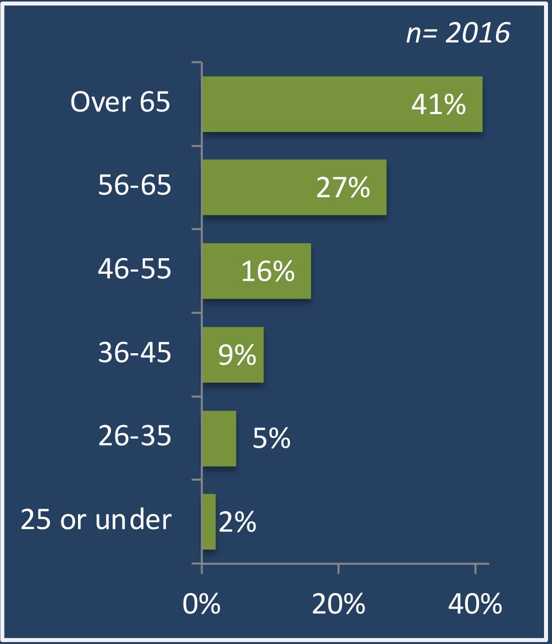


What We See

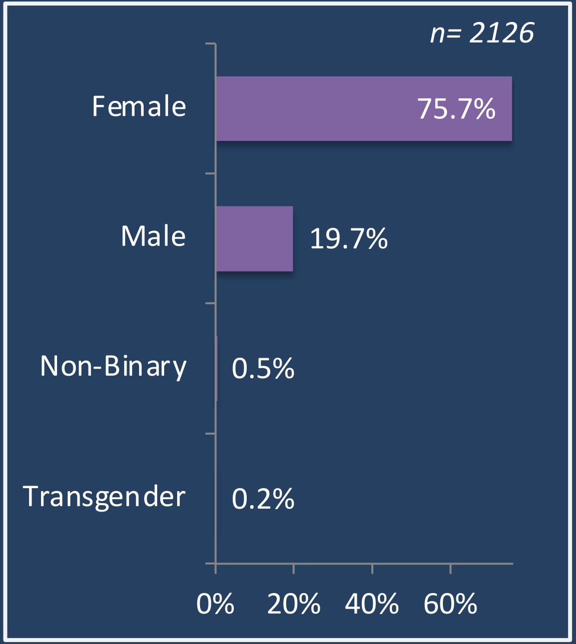
While the participating organizations are based in specific regions in B.C., their patrons not only come from within their immediate community, but also from various parts of the province and across Canada.

THE PATRONS

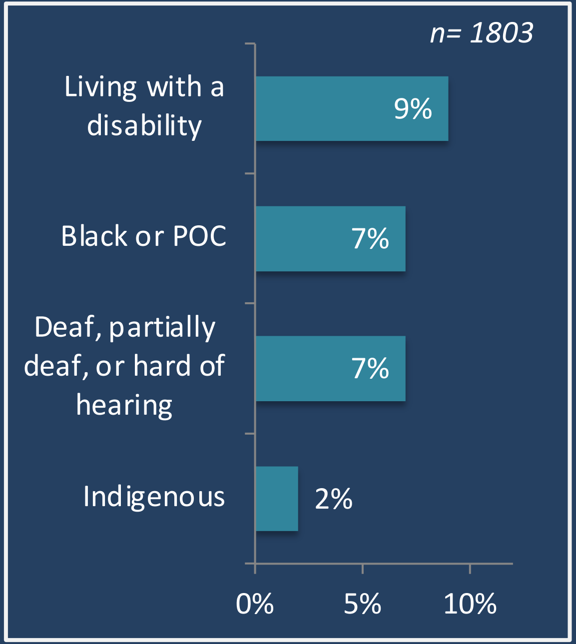
AGE



GENDER

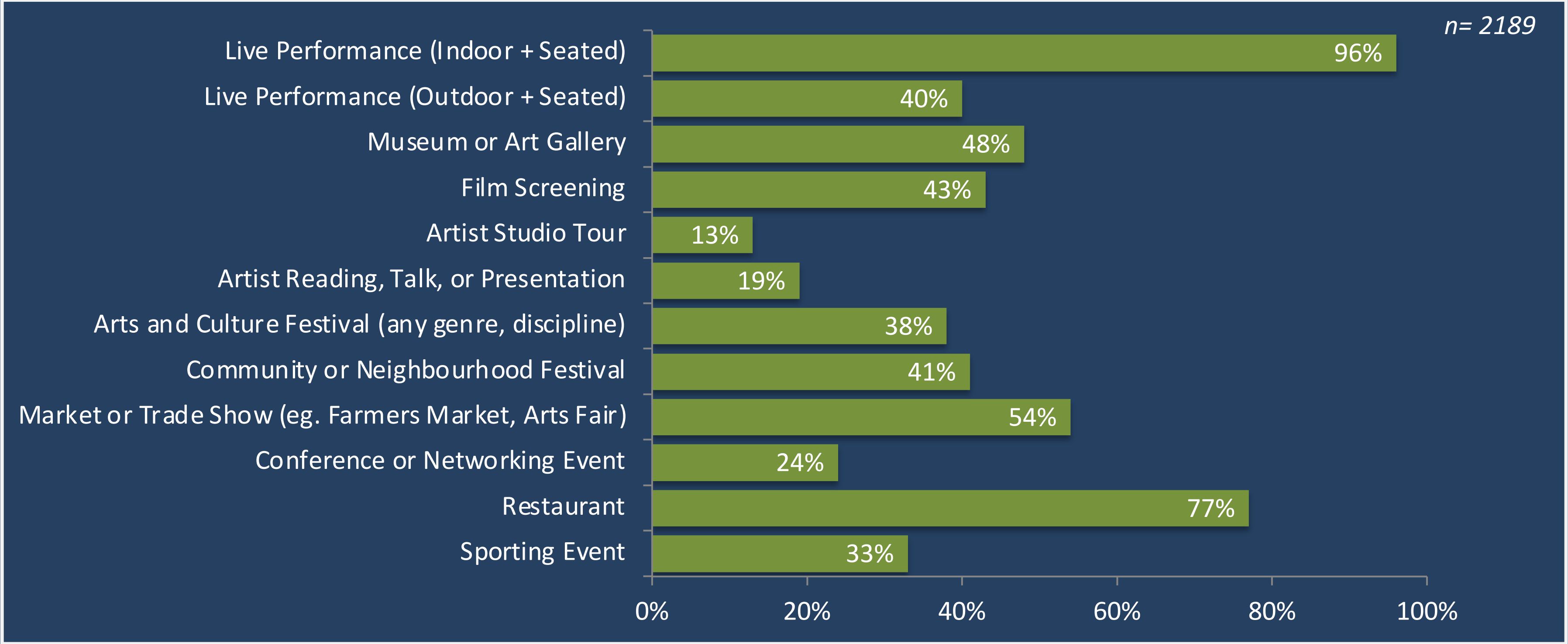


IDENTIFY AS...

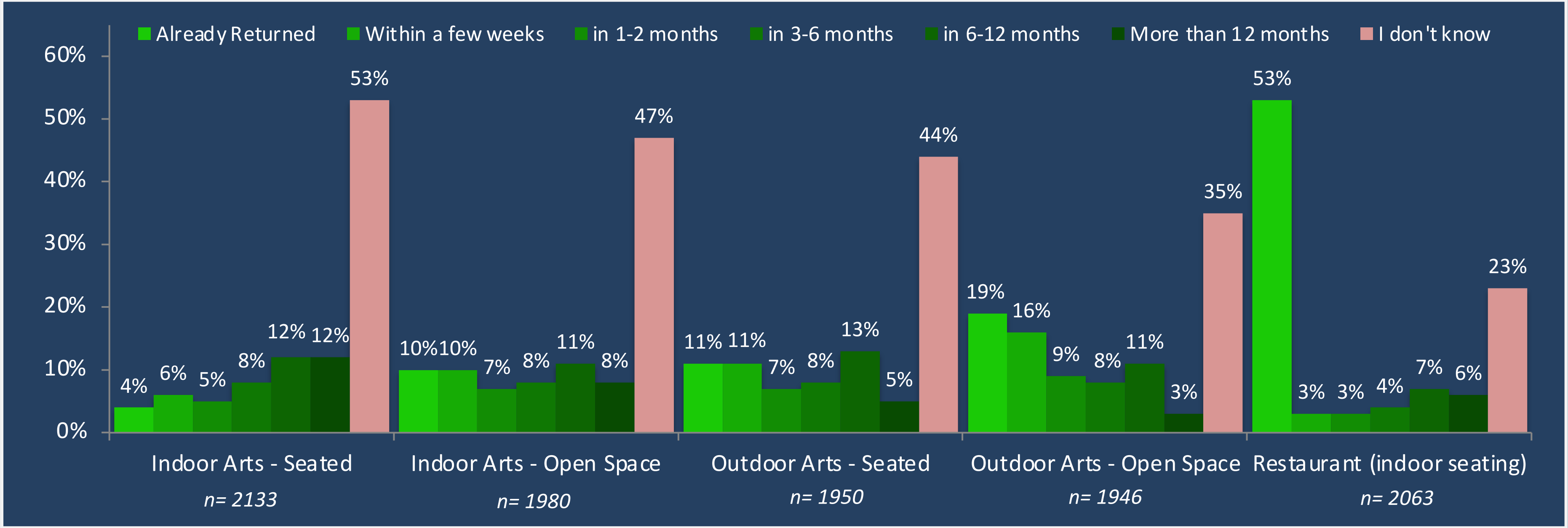


THEIR IN-PERSON ACTIVITIES IN THE 12 MONTHS BEFORE THE COVID-19 OUTBREAK

between March 2019 and February 2020



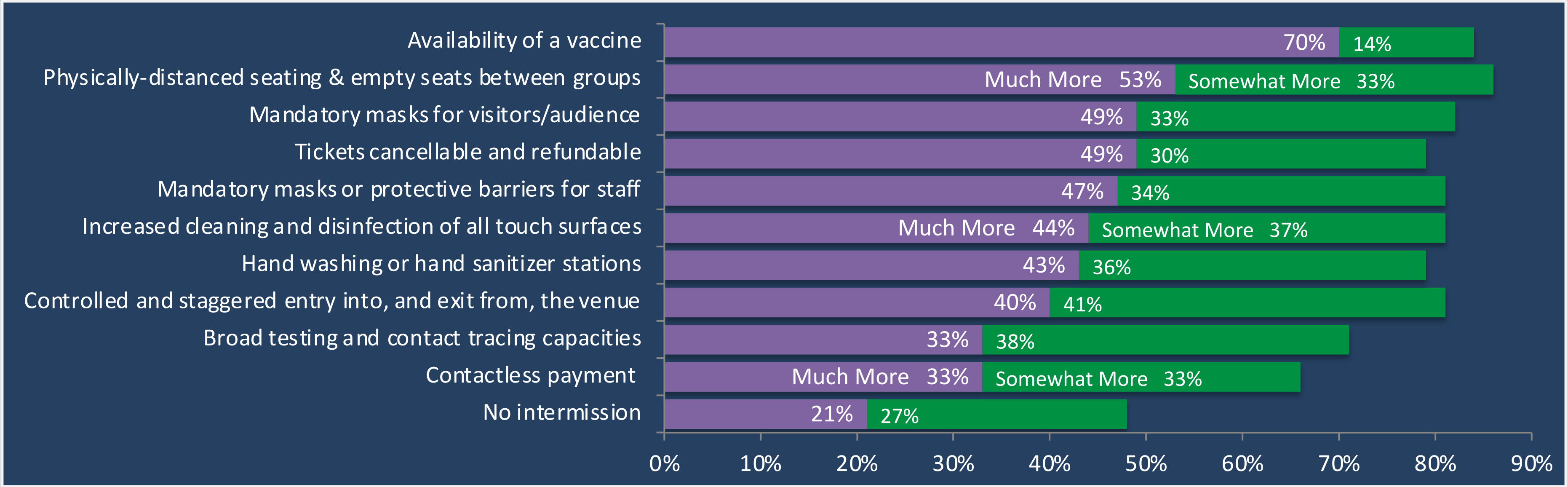
WHEN DO PATRONS INTEND TO RETURN TO THESE ACTIVITIES OR SPACES?



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.

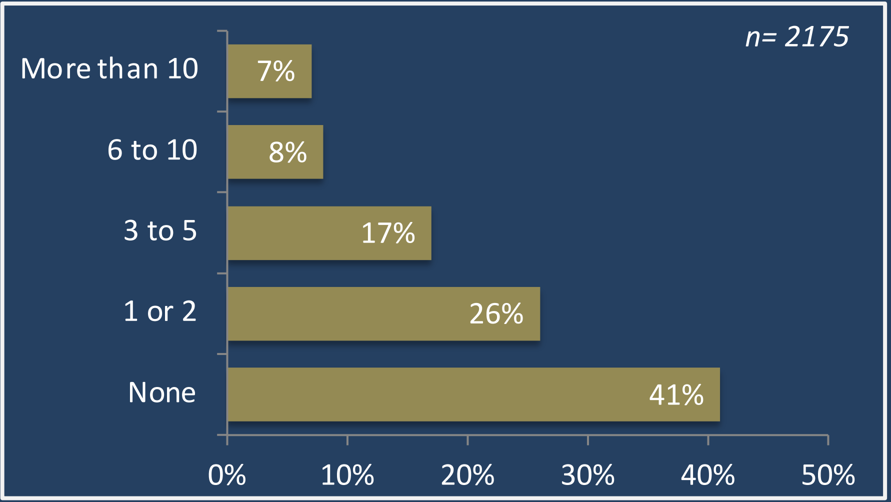
STRATEGIES AND MEASURES WHICH WILL MAKE PATRONS MORE LIKELY TO ATTEND A PERFORMANCE, EVENT, OR ACTIVITY



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%**.

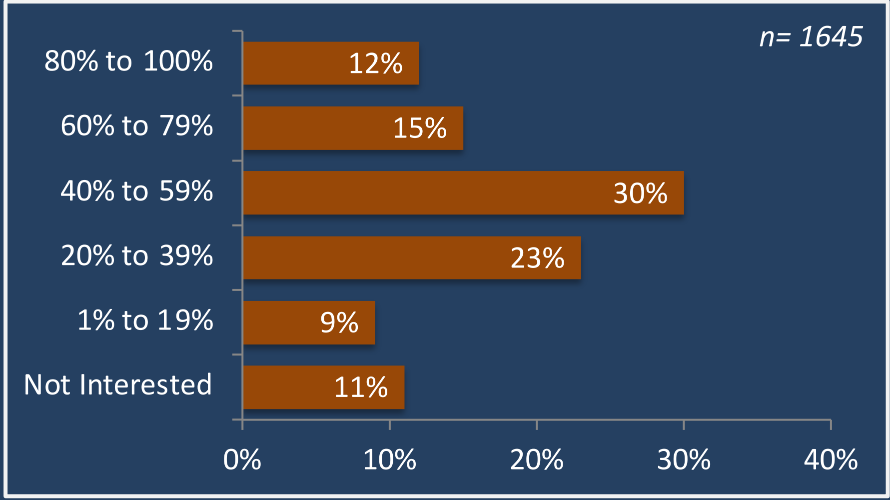
OF DIGITAL ARTS EVENTS, PEFORMANCES, OR VIRTUAL TOURS ATTENDED SINCE MID-MARCH



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.

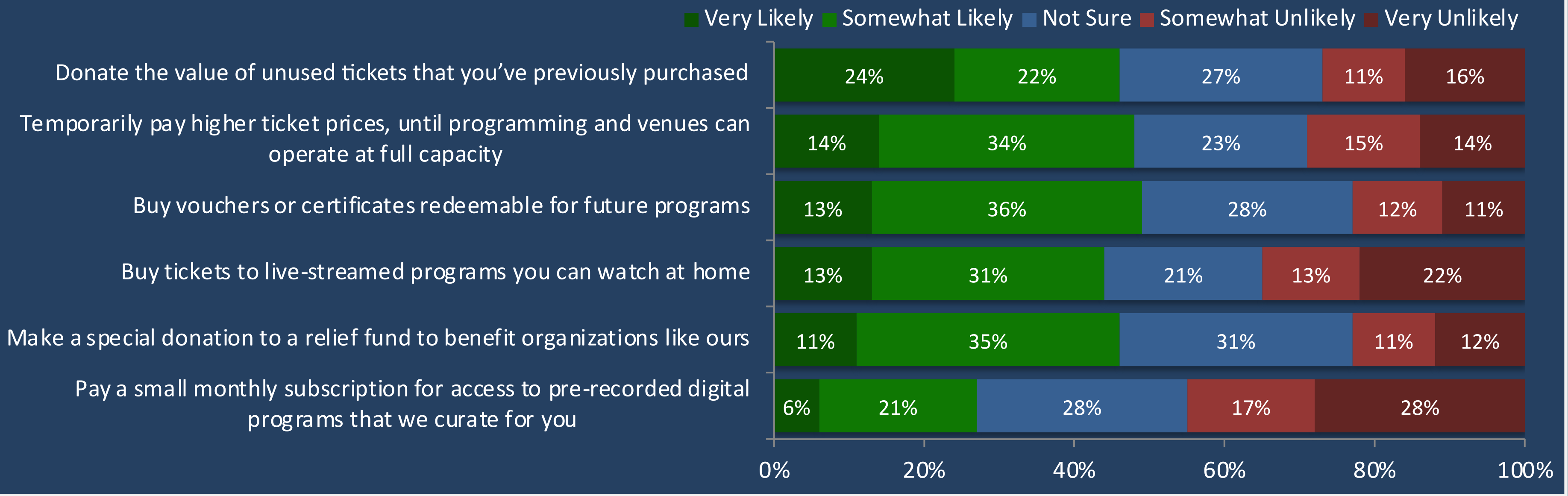
% OF TICKET PRICE PATRONS ARE WILLING TO PAY FOR SAME LIVE PERFORMANCE ONLINE



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

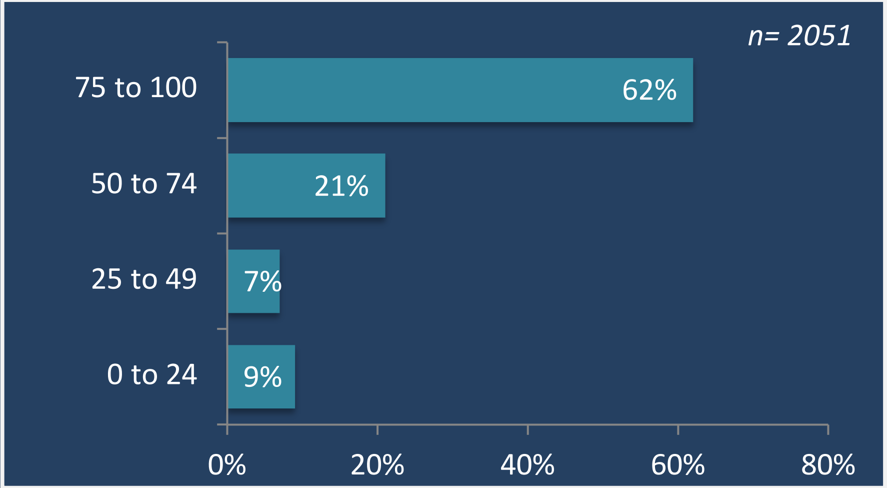


What We See

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



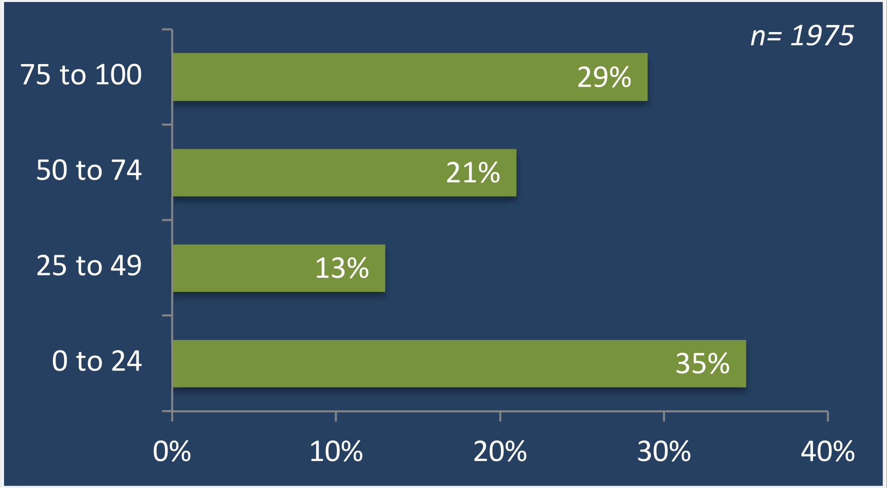
What We See

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

LEVEL OF COMFORT TO IMMEDIATELY RETURN TO IN-PERSON PROGRAMMING AND ACTIVITIES

(ASSUMING PUBLIC HEALTH GUIDELINES ARE FOLLOWED)

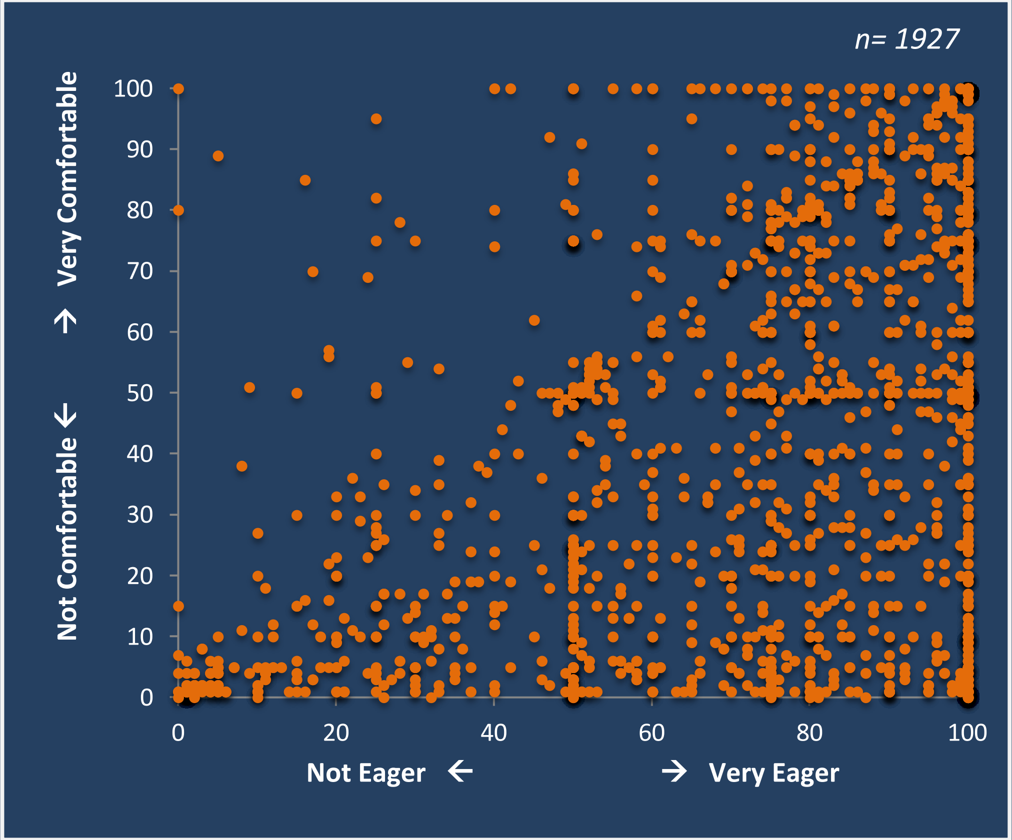
1 = Not Comfortable | 100 = Very Comfortable



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



Comfort ↑ / Eager →			
	1%	2%	31%
	1%	6%	17%
	12%	10%	21%

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)

Organizations in Metro Vancouver

Comfort ↑ / Eager →

1%	2%	25%
1%	6%	15%
15%	12%	25%

What We See

Patrons are evenly split: **25%** are *eager and comfortable* to return, and equally **25%** are *eager and NOT comfortable* to return.

Organizations Outside of Metro Vancouver

Comfort ↑ / Eager →

1%	3%	38%
1%	6%	18%
9%	9%	17%

What We See

Patrons of organizations outside of Metro Vancouver are more ready to return. **38%** are both *eager and comfortable*, while **17%** are *eager and NOT comfortable*.

What We See

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)*

Age 56 and older

1%	3%	32%
1%	6%	18%
10%	10%	20%

Comfort ↑ Eager →

Age 55 and younger

0%	2%	32%
1%	5%	14%
14%	9%	22%

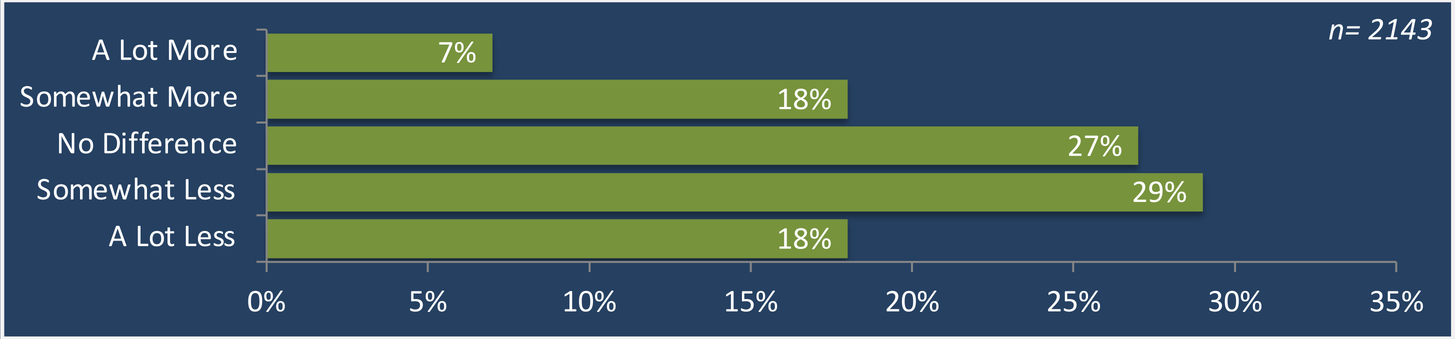
Comfort ↑ Eager →

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...

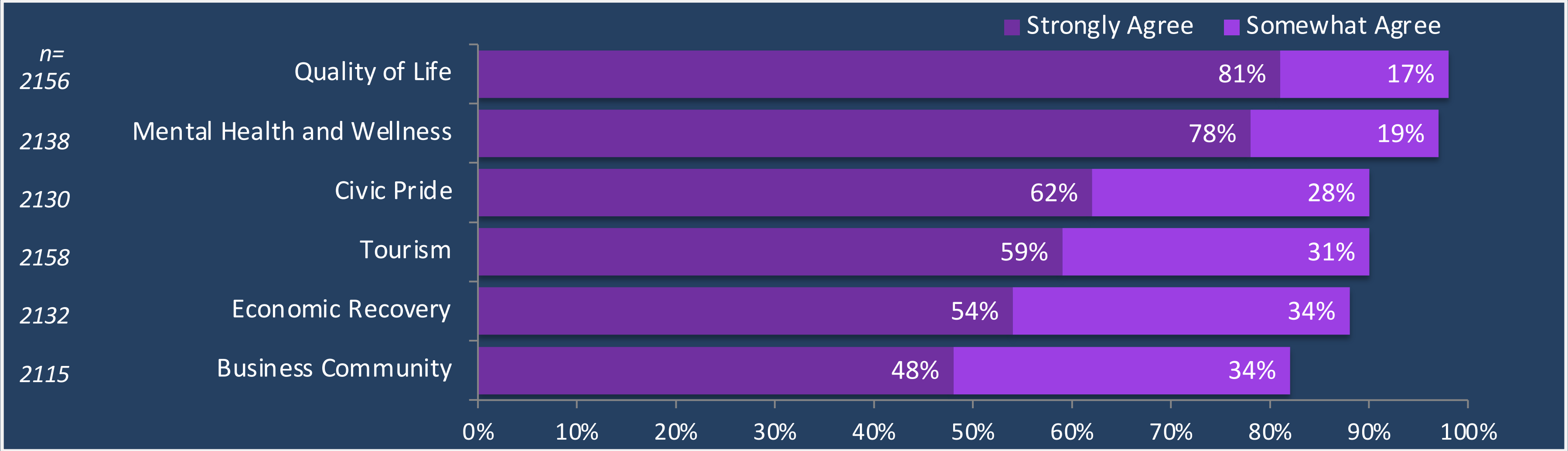
EXPECTED SPENDING ON ARTS AND CULTURE OVER THE NEXT 12 MONTHS



What We See

52% of patrons expect to *spend the same or more* on arts and culture in the next year, while **47%** expect to *spend less*.

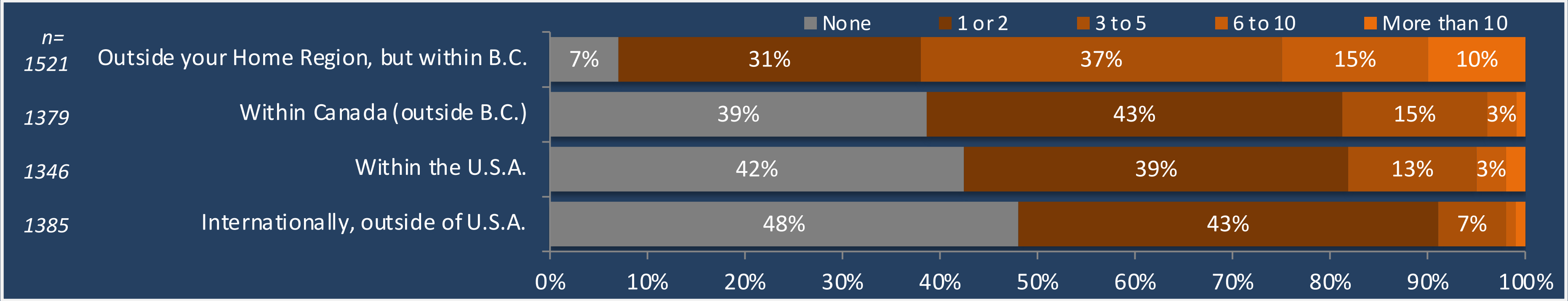
PATRONS BELIEVE ARTS AND CULTURE STRENGTHENS…



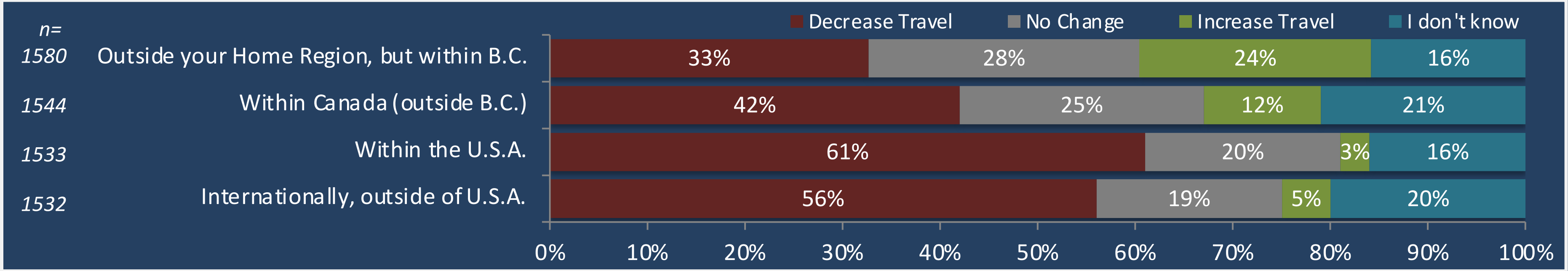
What We See

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



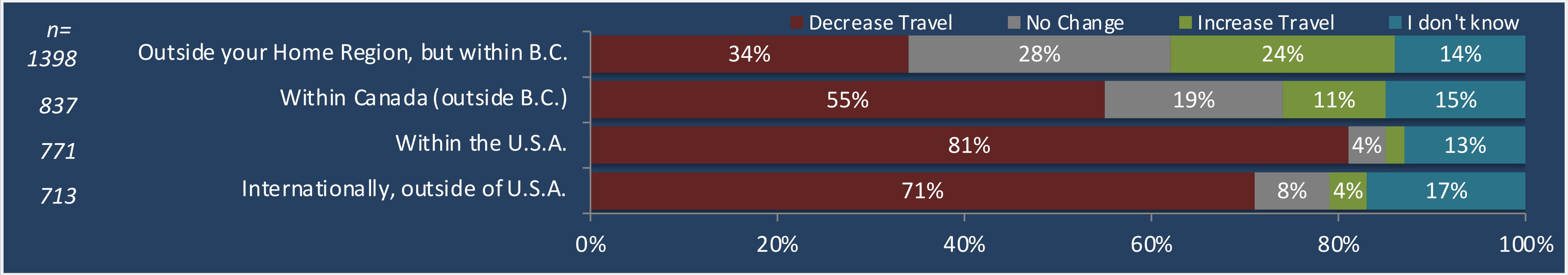
EXPECTED TRAVEL IN THE NEXT 18 MONTHS



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 at least once in 2019 for the category)



What We See

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

EXPECTED TRAVEL (of those that indicated NO travel in 2019 for the category)