

The NEW Experience Economy:

The Intersection of Arts, Culture, Sports & Recreation in a
Pandemic and Post-Pandemic Environment

Wave 1 Results: Calgary
June 2020

Table of contents

- 3 Overview of Research
- 4 How to use this report
- 5 What's different in Calgary?
- 6 Understanding Behaviours and Motivations
- 12 Engagement and Substitution Activities
- 16 How Comfortable are Calgarians?
- 22 Respondent Profile

Overview of Research

The New Experience Economy research project has been designed as province-wide initiative. Using a longitudinal approach over the course of one year, the purpose of the work is to provide relevant facts about local audiences that organizations who offer live group experiences can use to breath life back into our communities.



Details on Wave 1:

- Online survey, Albertans 18+
- Respondents were recruited through Angus Reid Forum.
- Field dates: May 21 - June 2, 2020
- Quotas set regionally, final data was weighted within Calgary by age and gender.
- A total of 1,348 surveys collected with Albertans. Within that sample, 499 Calgary-only surveys were collected:
 - 354 base surveys (within main sample)
 - 145 booster surveys

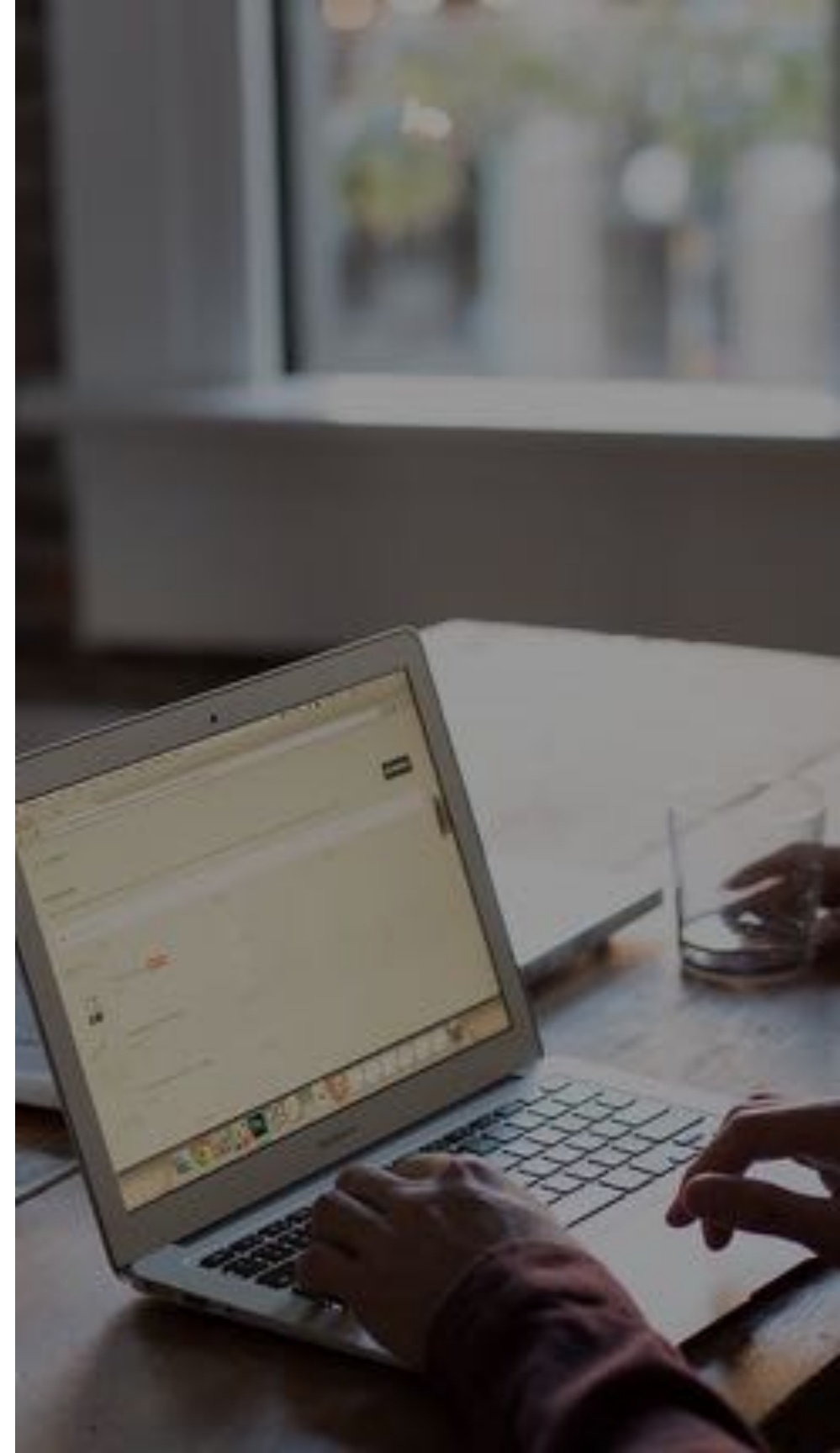
How to use this report:

This report will focus on outcomes from Calgary respondents only. The purpose of this report is to provide a supplementary perspective of the Calgary market specifically, for organizations who operate in the region.

It should be noted that the implications from the full report remain applicable to each individual market. The full (province-wide) results are available at:

www.stone-olafson.com/insights

Please note: Due to the inclusion of online, non-random sampling, a standard margin of error is not calculated for the results. However, an approximate rate of reliability typically associated with an overall sample of 499 would be +/- 4.4%, 19 times out of 20.



What is different in Calgary?

1.

Calgarians are slightly more active than the provincial average

Calgarians are more likely to attend sporting events and festivals, a reflection of what is offered in the city. They also participate in slightly more activities overall; a more intense engagement means more ground to make up to “get back to normal”.

2.

Motivations remain consistent

Behaviour patterns may be slightly different but province-wide implications for motivations hold. Calgary organizations need to leverage these to re-connect and remain relevant.

3.

Calgarians have a more fragile consumer mindset

This is reflected in higher density, demographic profile of the city (younger), a higher early caseload and the perception of a dual economic crisis (energy). Attitudes may shift over time but for now, it means Calgary organizations are working with an eager but nervous consumer.

Understanding Behaviours

Engagement takes many forms and crosses sectors

The same lens that is applied provincially can also be applied to Calgary as a way to understand how audiences engage across activities. For the purposes of this work, we consider Albertans and Calgarians who reported to *regularly* participate in the economy in the following ways (pre-COVID restrictions):



OBSERVE

While not part of the *active* experience economy, the spread of media and digital means audiences can participate in elements of the experience economy from a distance – downloading content, watching live events on TV or online; all allow for participation from a distance.



ATTEND

This category includes audiences who *regularly* attend events in-person. Given the broad nature of the experience economy, it includes experiences across sectors – arts and culture, festivals, sports, recreation and other live events.

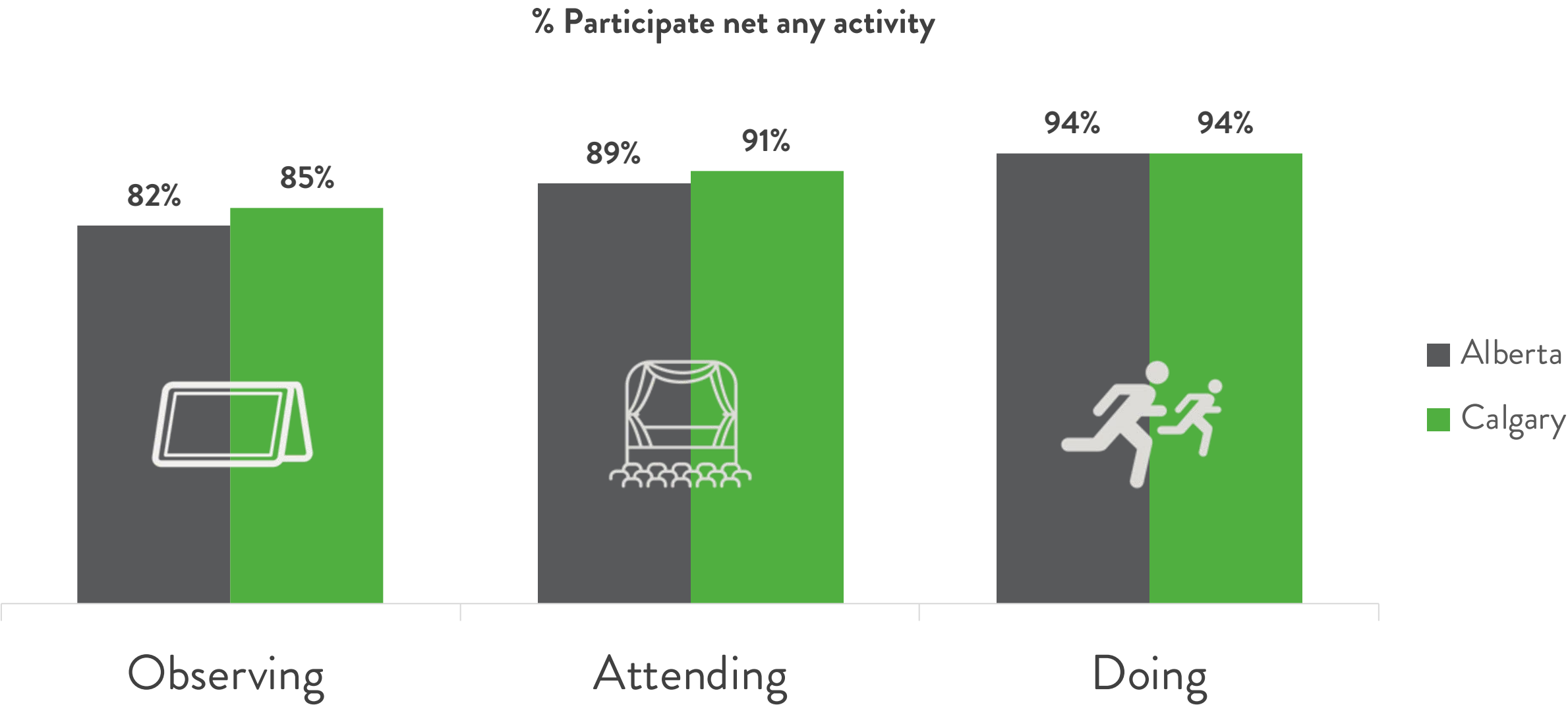


DO

The final type of engagement consists of individuals who regularly participate directly in the experience economy through doing – whether it is participating in organized sports, taking art classes, performing, traveling or enjoying recreational opportunities within the province.

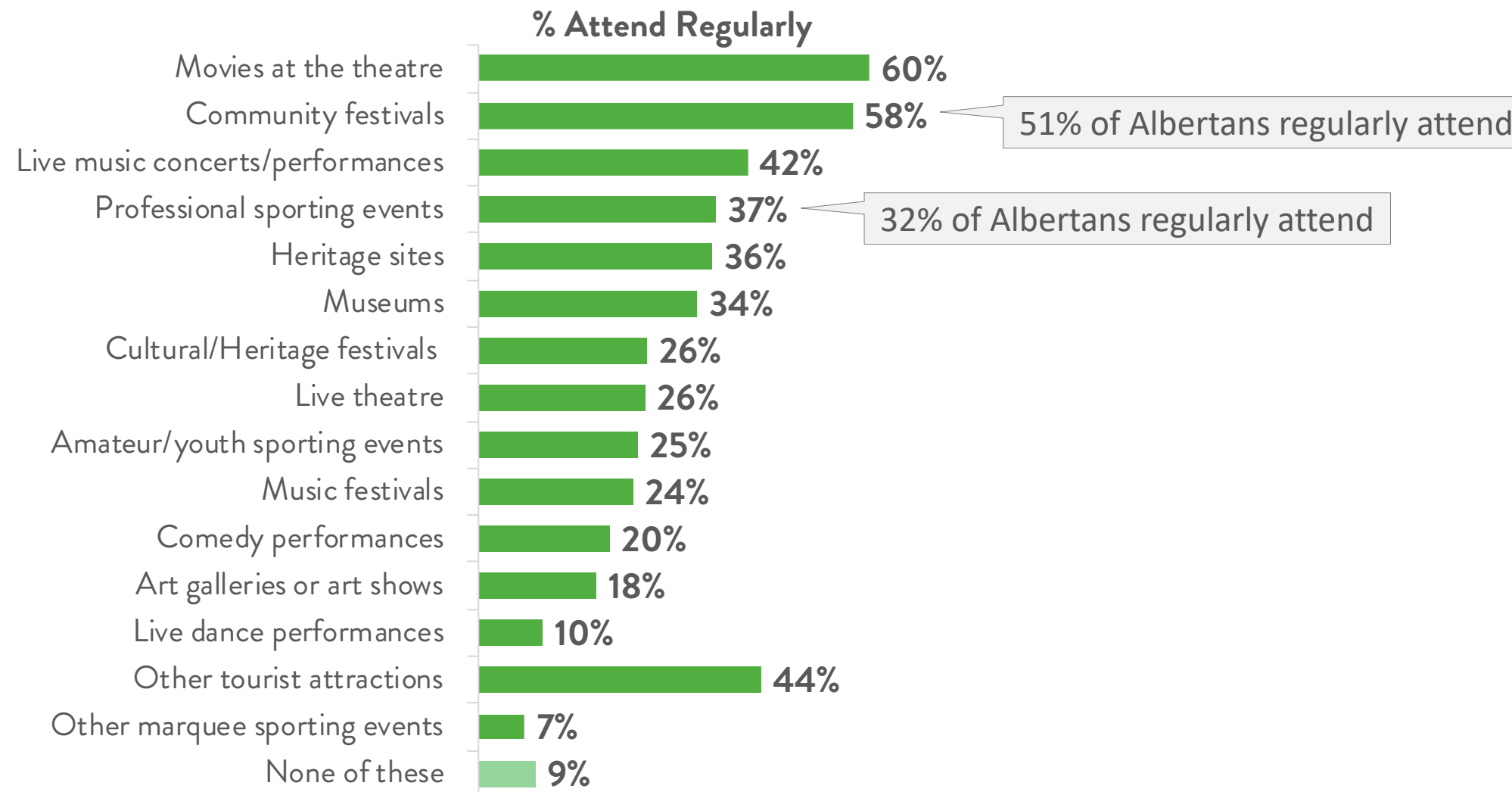
What do participation patterns look like for Calgarians?

The rates of participation in Calgary are remarkably similar to the province as a well. While Calgarians engage in similar patterns, the intensity of their engagement and the type of activities they participate in more frequently show some small differences.



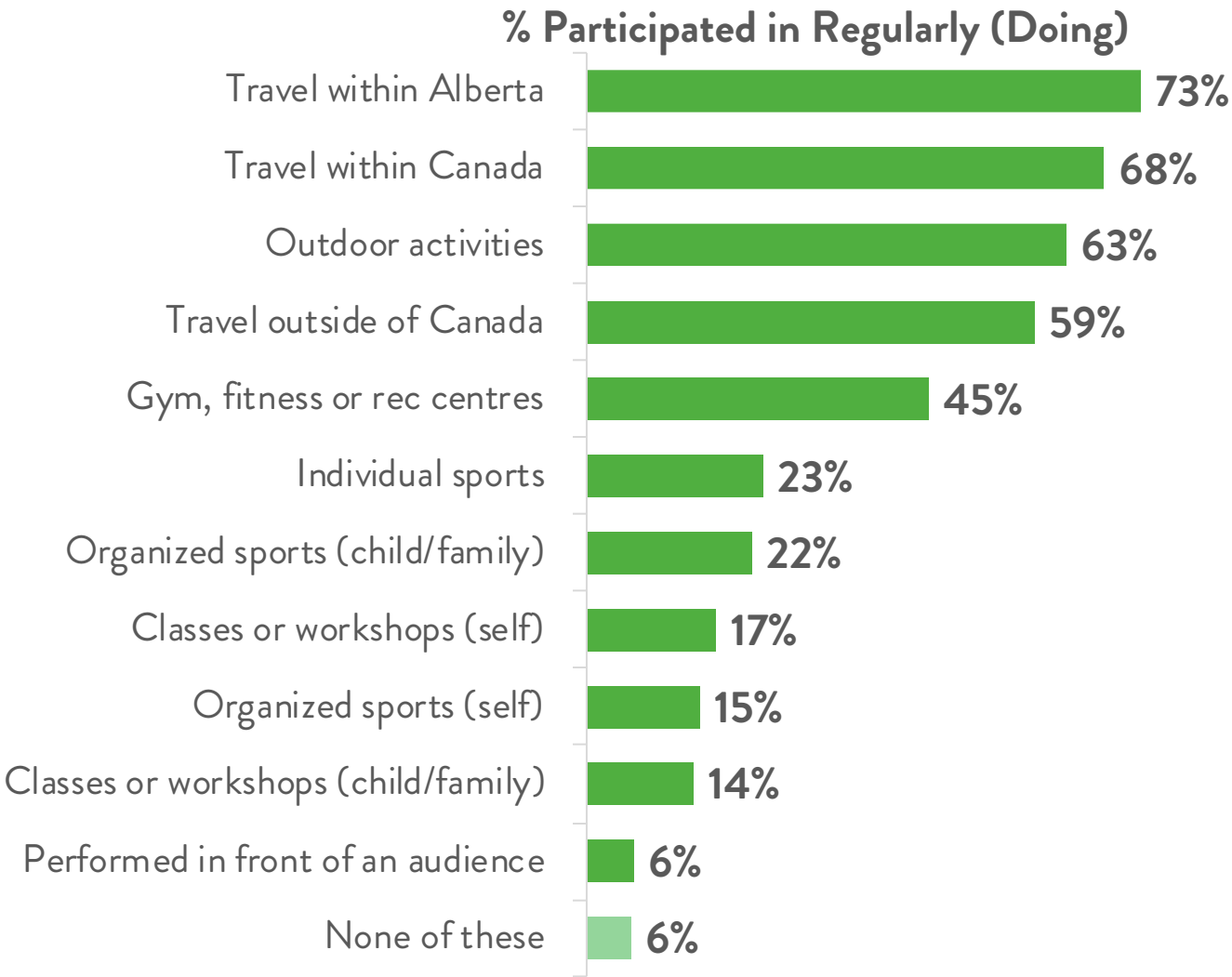
What do Calgarians Attend?

Compared to the rest of the province, Calgarians have higher attendance at community festivals (such as Stampede) and professional sporting events. **The average Calgarians attends 4.7 events (provincial average is 4.0).**



How do Calgarians differ in their participation activities?

Compared to the rest of Albertans, Calgarians are more likely to travel internationally and visit gyms/rec centres.

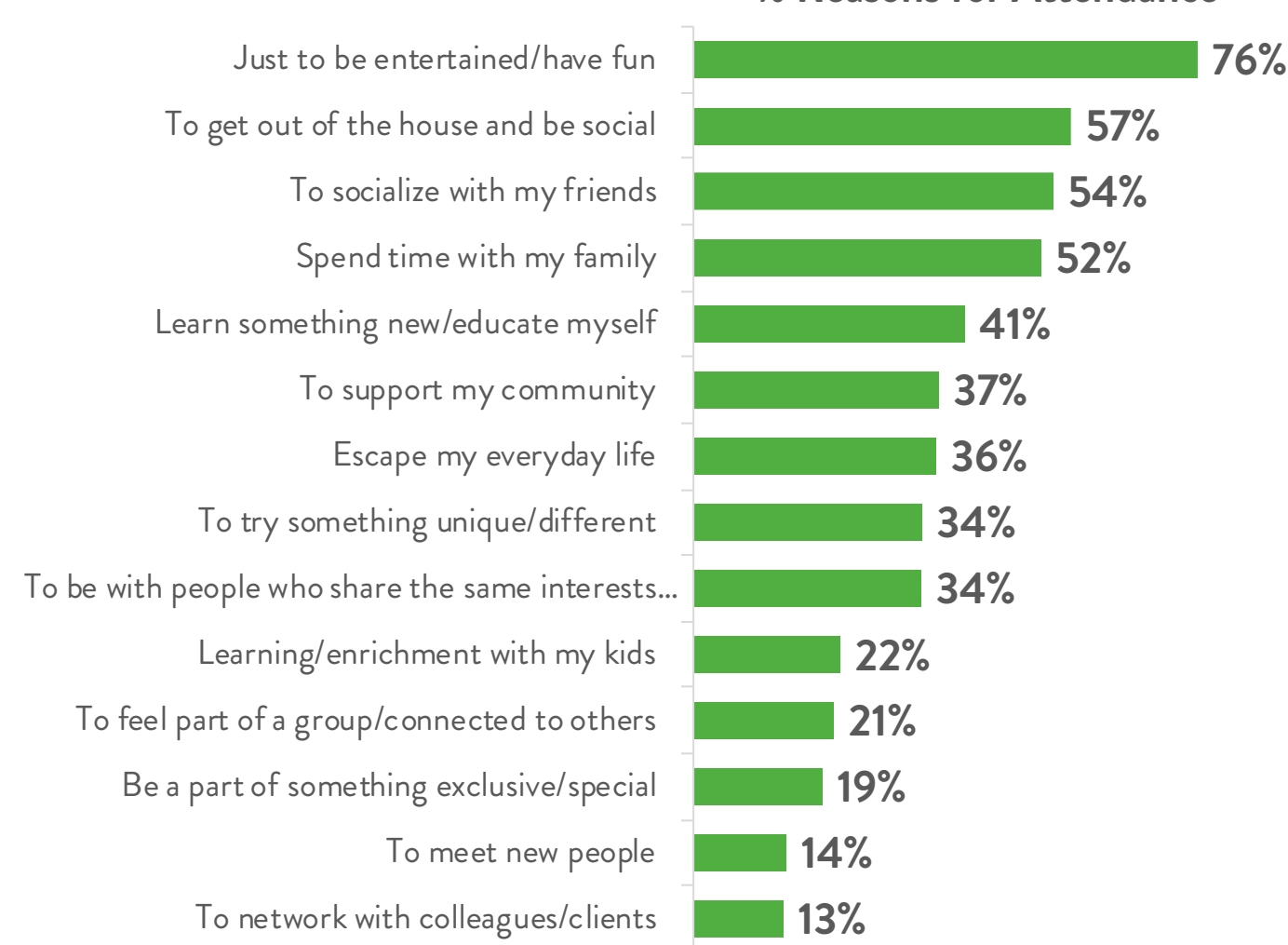


Q11. And, prior to the COVID-19 pandemic, please indicate which of the following you used to participate in on a regular basis?
Base: Calgary sample (n=499)

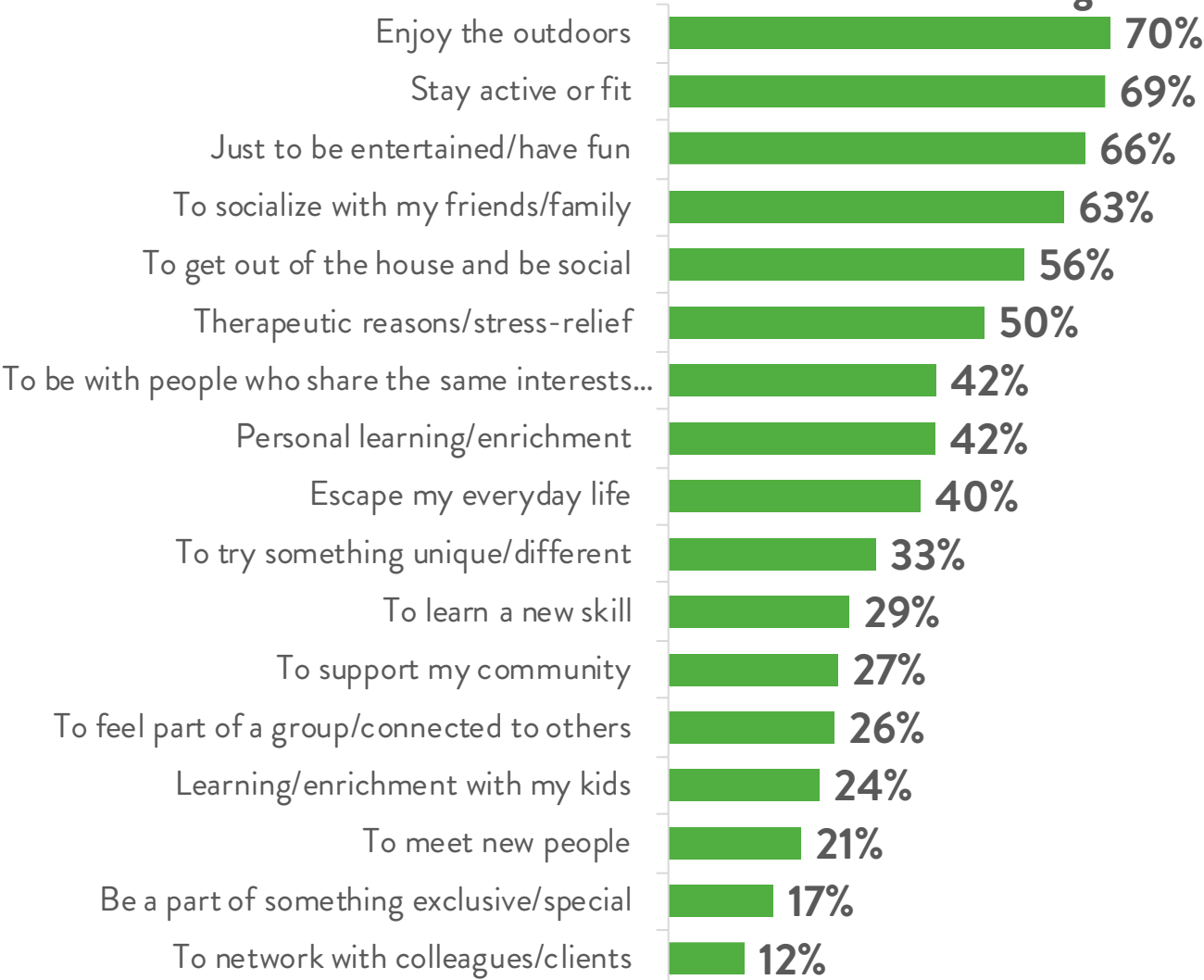
Yet the core benefits for Calgarians remain centered around entertainment, socialization and health

These remain the pivot points to leverage in order to successfully re-connect with Calgary audiences (regardless of activity type).

% Reasons for Attendance



% Reasons for Doing



Q10. Broadly speaking, what are some of the main reasons you attend these activities?

Q12. Once again, what are some of the main reasons that you chose to participate in these activities.

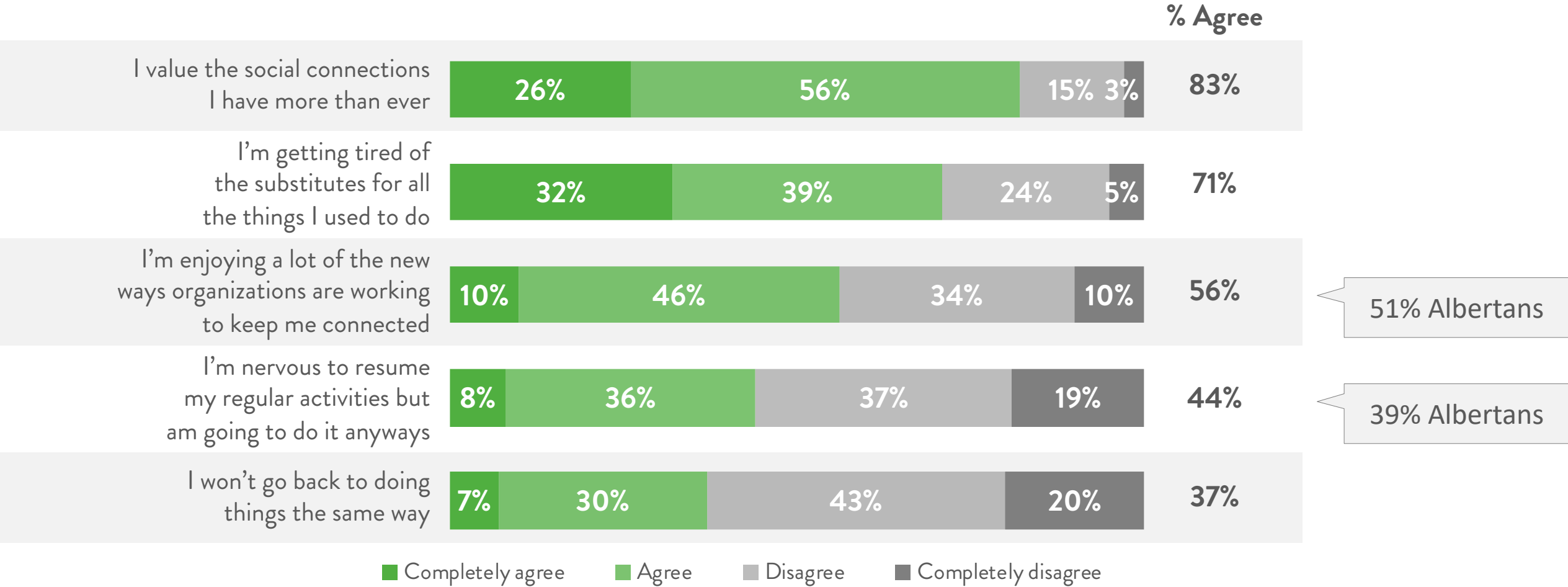
Base: Calgary sample (n=499)

A person with short brown hair, wearing a dark blue short-sleeved shirt, is seen from the side, looking down at a laptop screen. The background is a blurred office environment with wooden desks and other people working. The overall image has a soft, slightly desaturated aesthetic.

Engagement and Substitution Activities

Much like the rest of Alberta, there is a desire for re-establishing social connections and a general fatigue of substitution activities

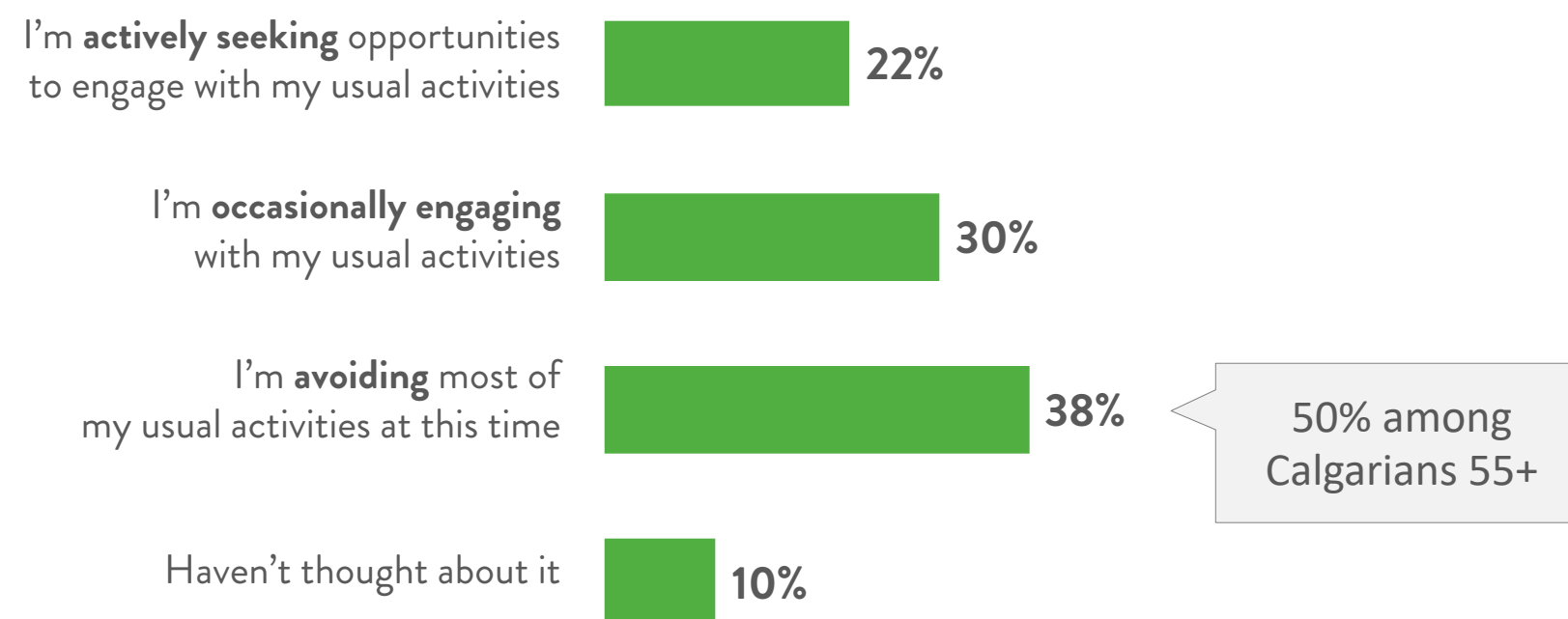
That said, Calgarians are slightly more likely to be enjoying some of the new things organizations are trying. Also slightly higher agreement for “I’m nervous but going to return anyways”



Q16. Now that we’ve asked you about the ways you have been connecting with organizations and activities throughout restrictions, we’d like to understand how you feel at this time. Please indicate your level of agreement with the following statements.
Base: Calgary sample (n=499)

About half of Calgarians have been engaging in their usual activities through different channels

Not surprisingly, those who would like the city to re-opening faster or who are most comfortable interacting with others are likely to seek out engagement – they are eager.



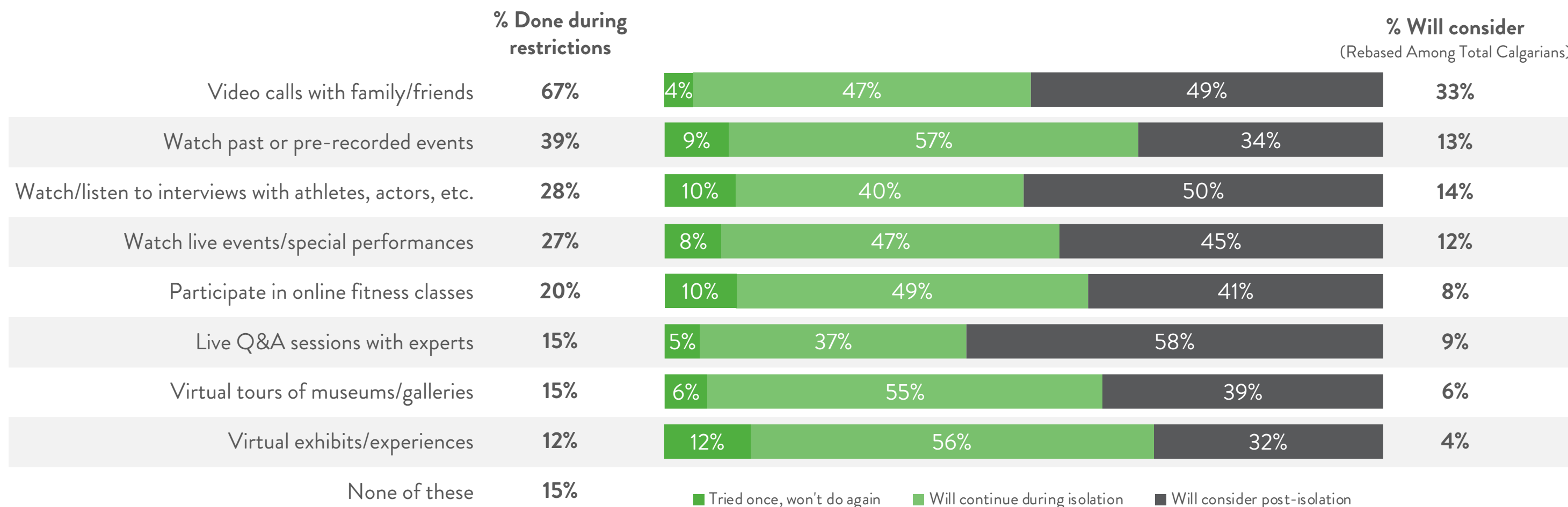
Q13. Since restrictions on gatherings in Alberta were implemented in mid-March, organizations have been trying to engage with audiences, primarily through digital channels. Which statement best describes how you are connecting with some of your normal activities?

Base: Calgary sample (n=499)

What engagement activities are working for Calgarians?

Among all activities, Calgarians are more likely to be participating in online fitness classes than the rest of the province.

For the remainder of activities, there is a mix of opinions on what will be continued during isolation periods and what Calgarians will consider post-isolation. Watching recorded events and virtual tours/experiences have the biggest draw for now (even though smaller numbers participate) but less long-term relevance.



Q14. Here is a list of some of the things that people and/or organizations have been trying in order to stay connected during restrictions, which ones have you done?

Q15. And now, of all the things you've tried, we'd like to understand which ones were more successful and which ones you probably won't do again.

Base (Q14): Calgary sample (n=499); Base (Q15): Have participated in activity (n=varies)

How comfortable are Calgarians?

Do Your Part While Enjoying Our Parks

Practice Social Distancing to help prevent
the spread of colds, flu, and the coronavirus



- Avoid group gatherings

- Keep hands clean

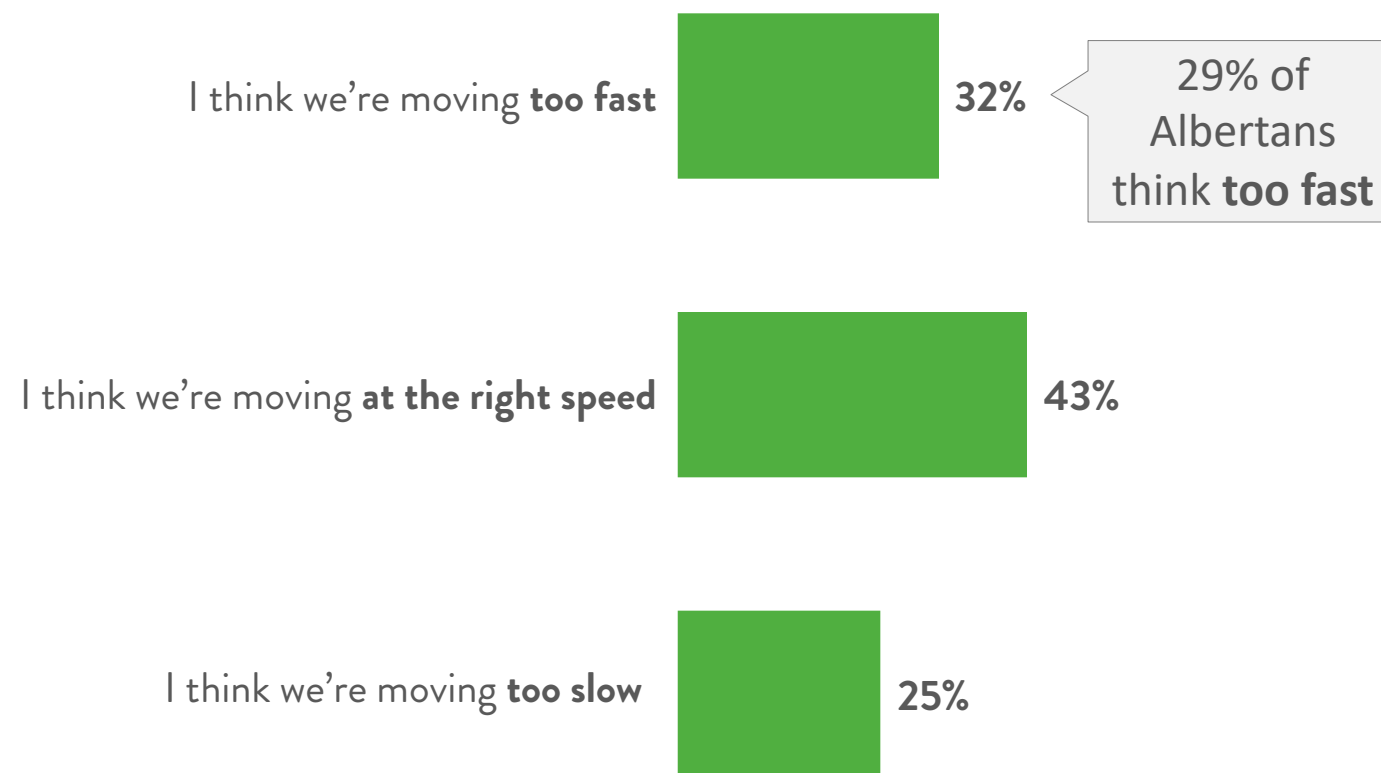


- Use disinfectant wipes when
touching public equipment in
playgrounds and courts

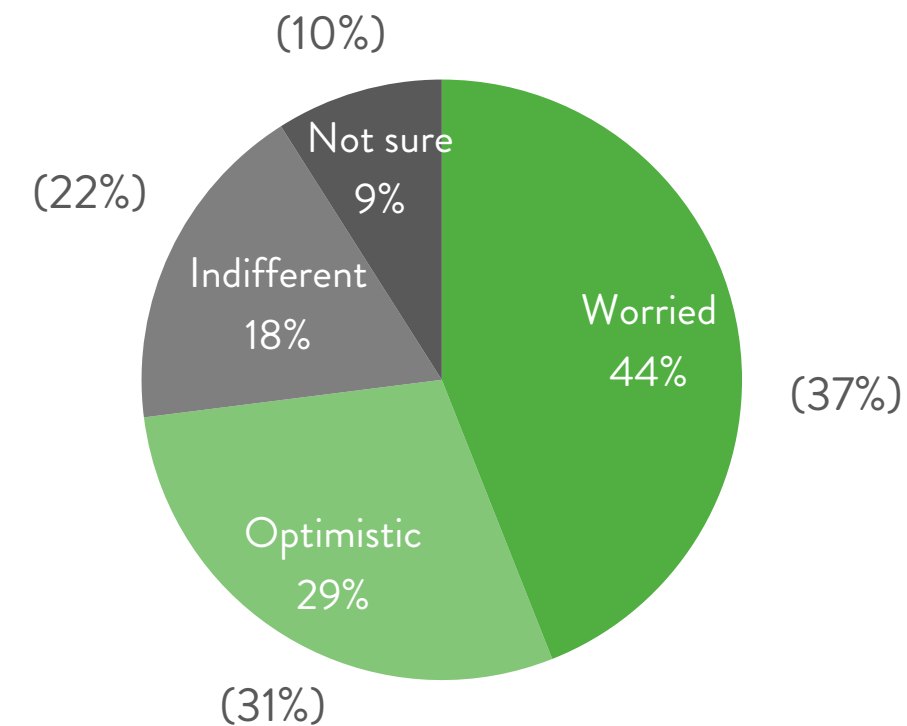
Calgarians have a similar outlook towards re-opening as the rest of the province but do have a higher level of worry permeating their perceptions

For Calgary, mindset likely reflects a combination of factors – higher caseload than the rest of the province (at the time of fielding) and concerns about the local economy/energy prices.

Opinion on Re-opening



% Current State of Mind (Provincial % in brackets)



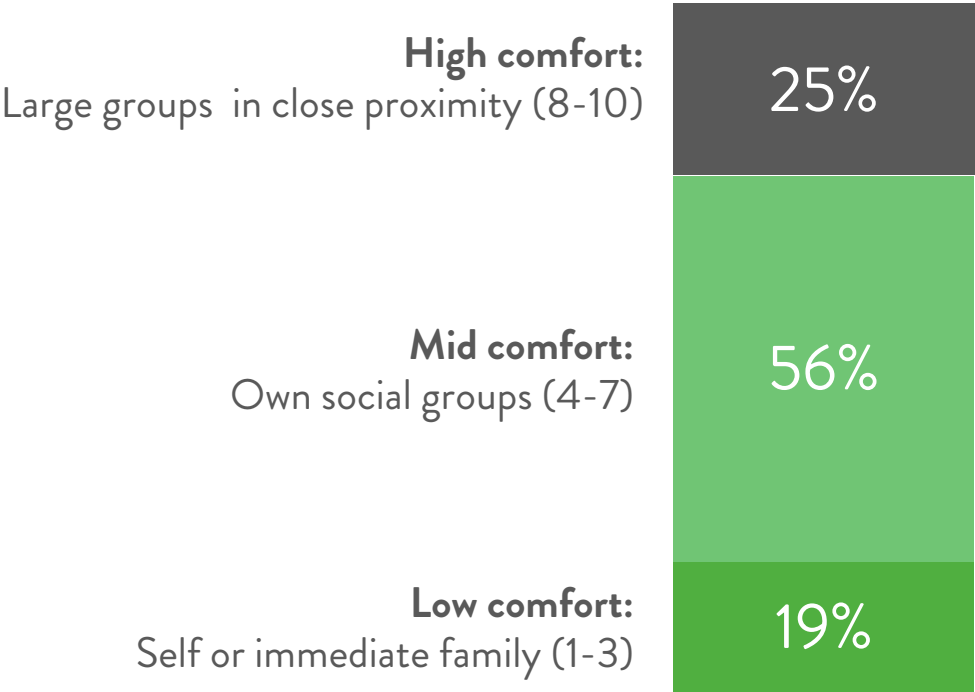
Q17. Which statement best reflects your personal opinion on the current state of re-opening in Alberta?

Q22. Given everything that is happening in Alberta, which of the following best describes how you are feeling today?

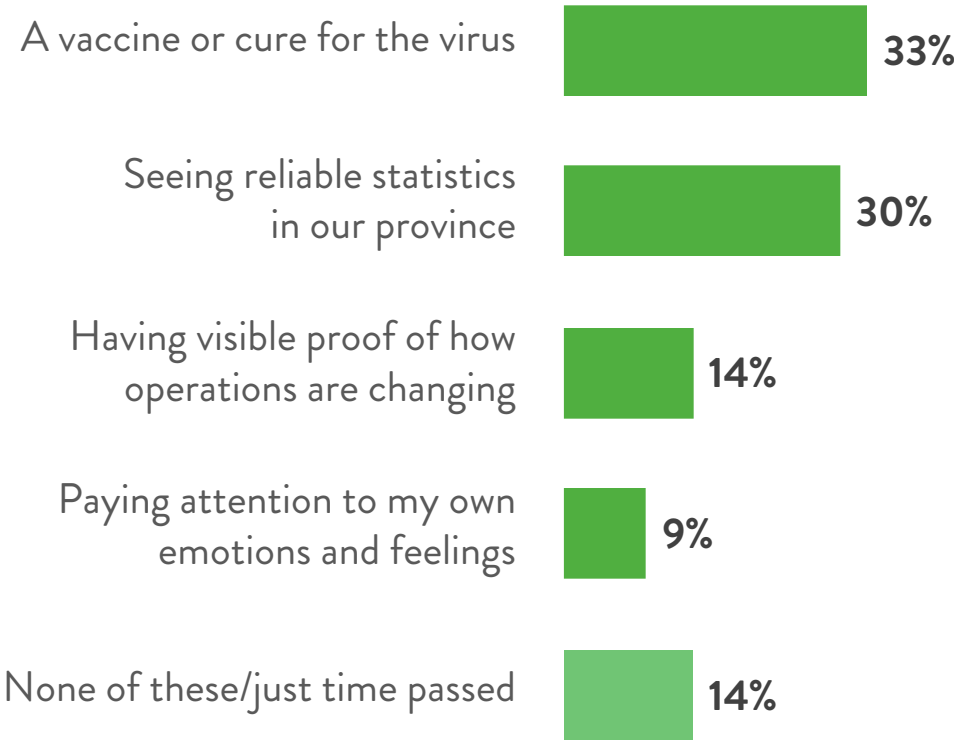
Base: Calgary sample (n=499)

Calgarians mirror the rest of the province with respect to comfort level interacting with others

% Comfort level – Interacting with Others



% Needed to increase comfort



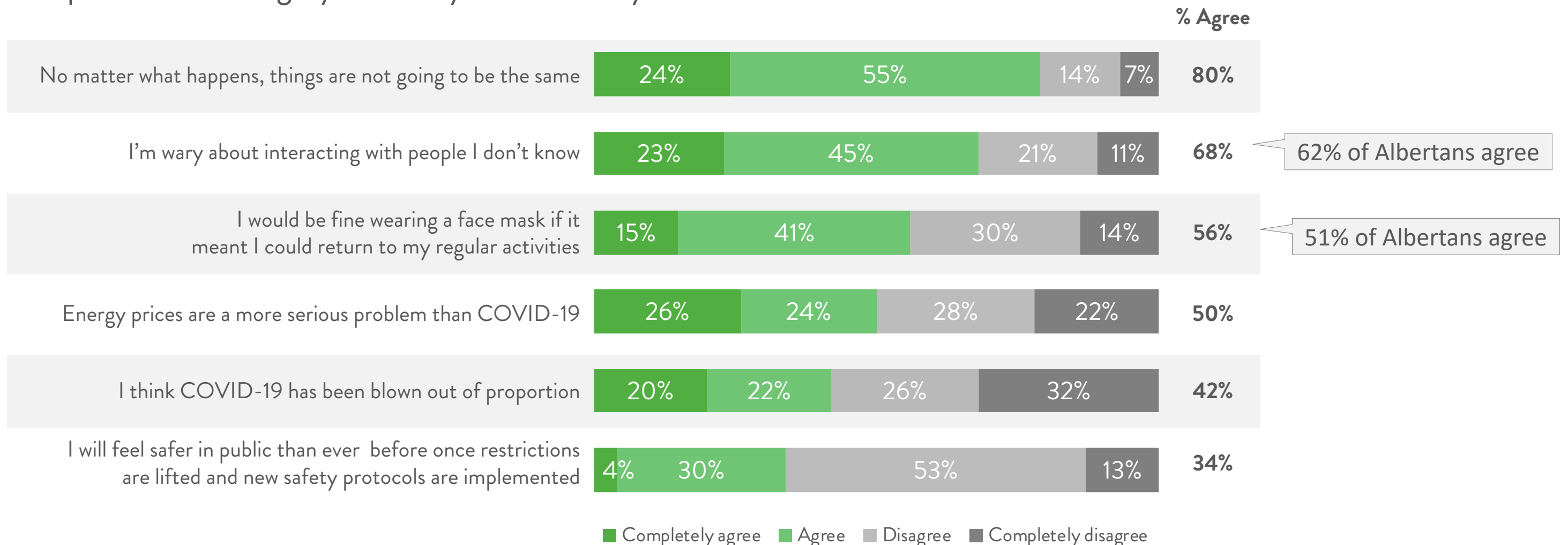
Q18. As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community?

Q19. Which is MOST important to you personally, in order to increase your comfort level with resuming your regular activities?

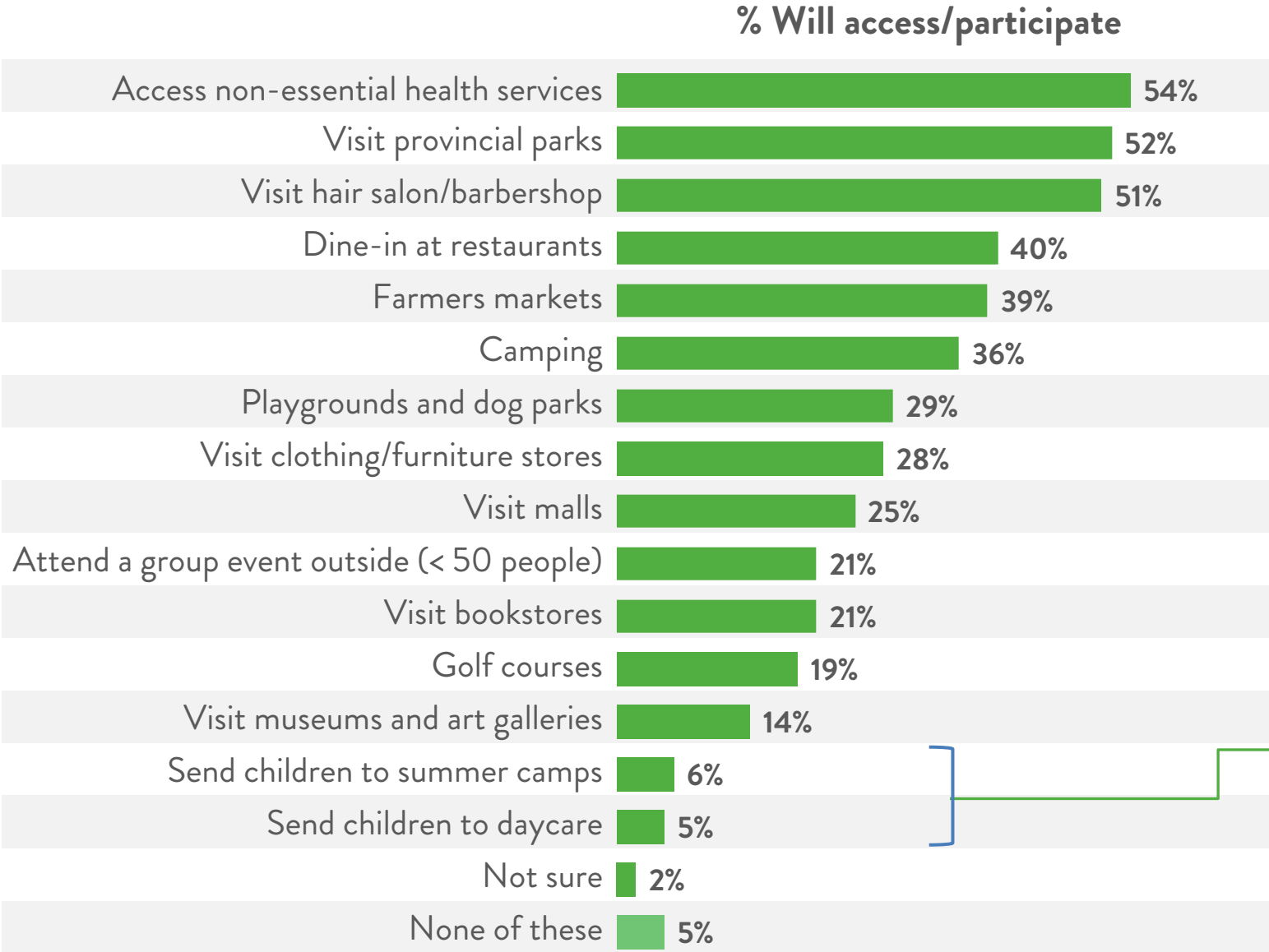
Base: Calgary sample (n=499)

Demonstrating how complex attitudes are, Calgarians see energy prices as a dual challenge and help drive provincial perceptions on the topic

Despite those concerns, Calgarians still have a higher sense of wariness about interacting compared to the rest of the province but are slightly more likely to indicate they would wear masks.



Anticipated behaviours from Calgarians are not drastically different from other areas of the province on top services – health services, haircuts and parks.



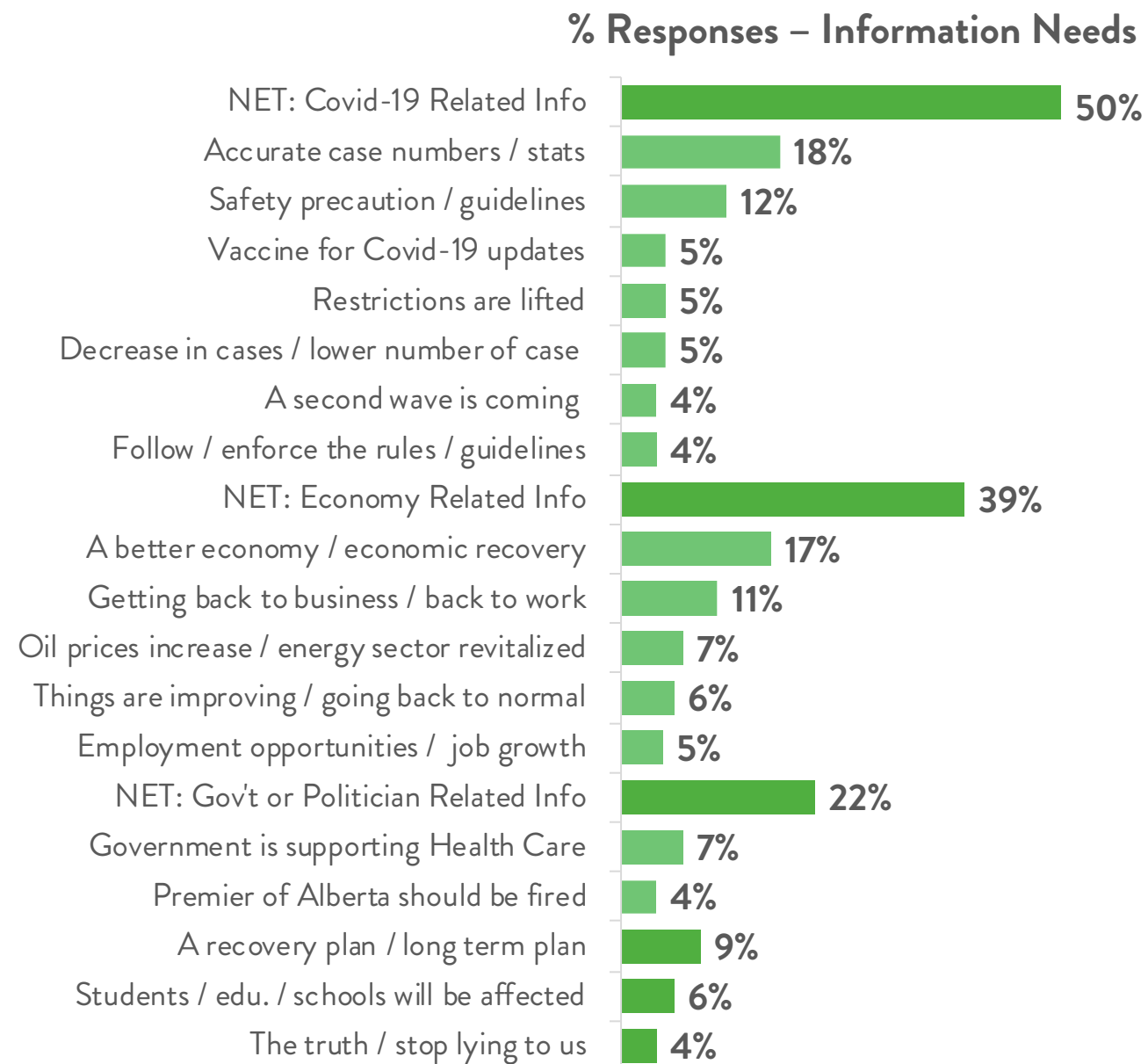
There are some small exceptions – Calgarians are less likely to say they will dine in restaurants compared to the rest of Alberta (47%), go camping (44%) and attend outdoor group events (27%). These differences likely reflect the different stages of re-opening across Alberta, as Calgary region had higher caseloads and a delayed re-opening.

Only 22% of **those with kids** will access childcare immediately.

Q21. The Government of Alberta has released a list of business and services that are opening in May (with variations across regions). Of all the things you can do, which will you do at the next available opportunity?

Base: Calgary sample (n=499).

Information needs: Calgarians, like Albertans have a more immediate need for COVID-related needs over other pieces of information



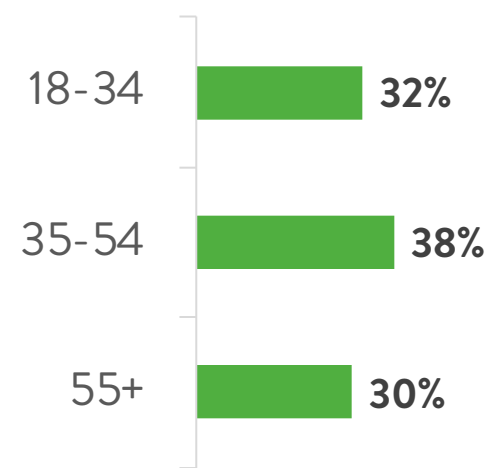
Again, the desire for COVID specific information likely stems from localized outbreaks and a desire to understand the city’s higher caseload for a period of time. But like the rest of Albertans, Calgarians are also looking for economy-related information. – and this will likely becoming more pressing over time.

Q23. There are lots of things people want to know at this uncertain time. Thinking about the situation in Alberta specifically, what do you need to hear and know about right now? (mentions of 4% or greater included)
Base: Calgary sample that provided response (n=384)

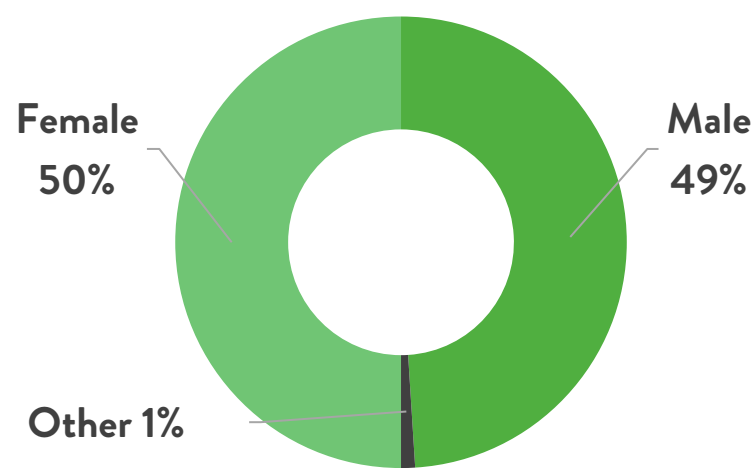
Respondent Profile

Who we heard from

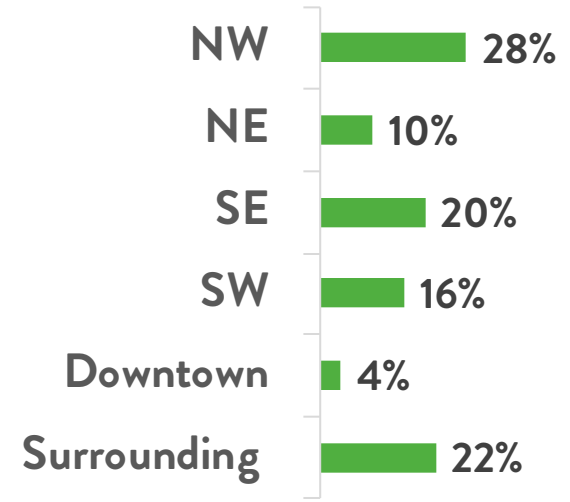
Age



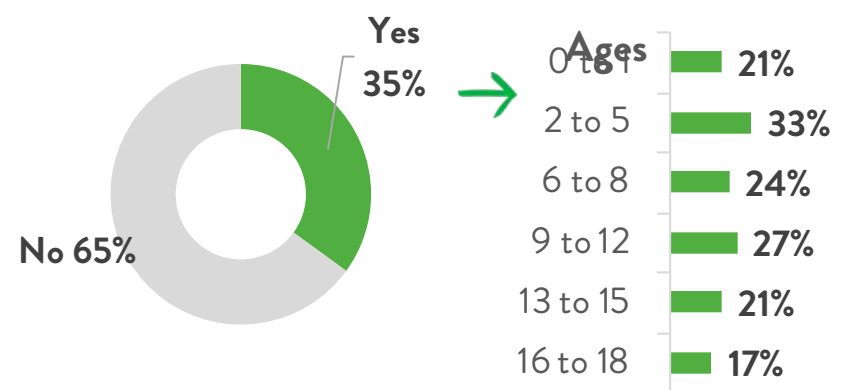
Gender



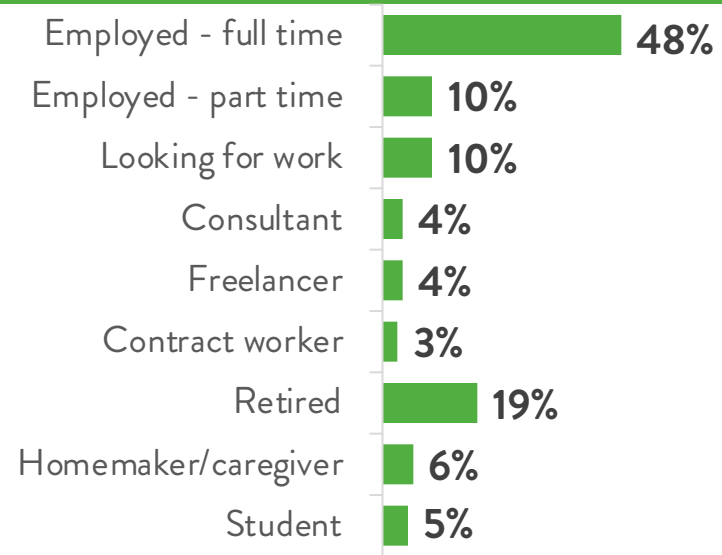
Location



Children in the Household



Employment



Household Income

