The NEW Experience Economy:

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

Wave 1 Results
June 2020

Stone — Olafson

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Meet the supporters behind the work.

This initiative is being funded by leaders who see an opportunity to support organizations which bring remarkable experiences to life in communities across Alberta. **We thank them for their generous support**.

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Alberta Foundation for the Arts

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Background & Purpose

Like the rest of the world, Alberta is navigating a new reality brought by a pandemic that is changing public life and re-shaping our economy. Organizations in the arts, culture, sports, recreation, tourism and hospitality sectors, all whom rely on live group experiences, are grappling with new challenges. Uncertainty is the only thing that is certain right now and organizations need to be prepared for a change in audience behaviour. The question is what that will look like, now and over the coming months.

Stone-Olafson, in collaboration with community partners, developed a long-term research investigation to evaluate how current conditions will reshape Albertans' attitudes and behaviours towards social and group activities, across a variety of sectors.

The purpose of this work is to give leaders of community sports, recreation, arts & culture, professional sports, active living, heritage, tourism or hospitality sectors relevant facts about local audiences that they will need to bring life back to our communities.

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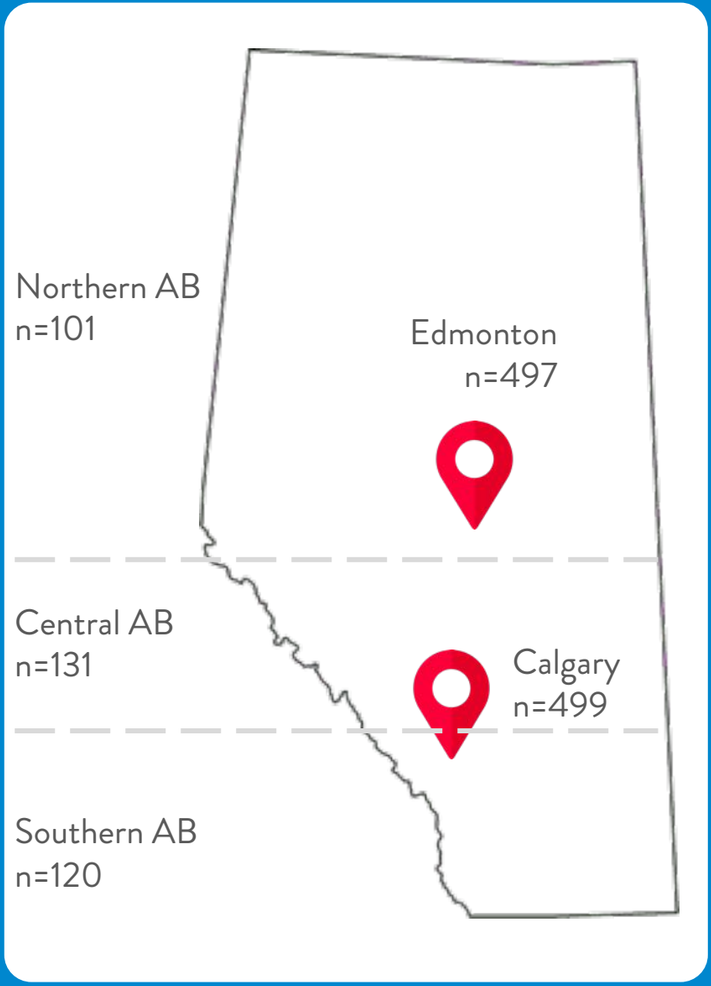
Overview of Research Process:

The research process is designed to run in regular intervals over the course of one year (a total of six waves). A single, point-in-time approach is limiting in assisting organizations to plan effectively over the long term.

Results presented represent the findings from Wave 1. Subsequent waves will follow the same methodology:

- Online survey with Alberta residents, aged 18 years and older.
- Respondents were recruited through a partnership with Angus Reid Forum.
- Regional quotas were applied to ensure the sampling was representative of Alberta's population.
- Supplemental surveys were conducted with residents of Calgary and Edmonton.
- A total of 1,348 Albertans participated in the first wave of research. Responses include 1,040 regionally balanced core sample, plus supplemental (booster) responses for Calgary and Edmonton.
- Data collection occurred between May 21, 2020 and June 2, 2020
- Statistical weighting was used to further ensure the integrity of the final data set. Results were weighted (based on the most recent census data) to more accurately reflect the age and gender distributions of each region.

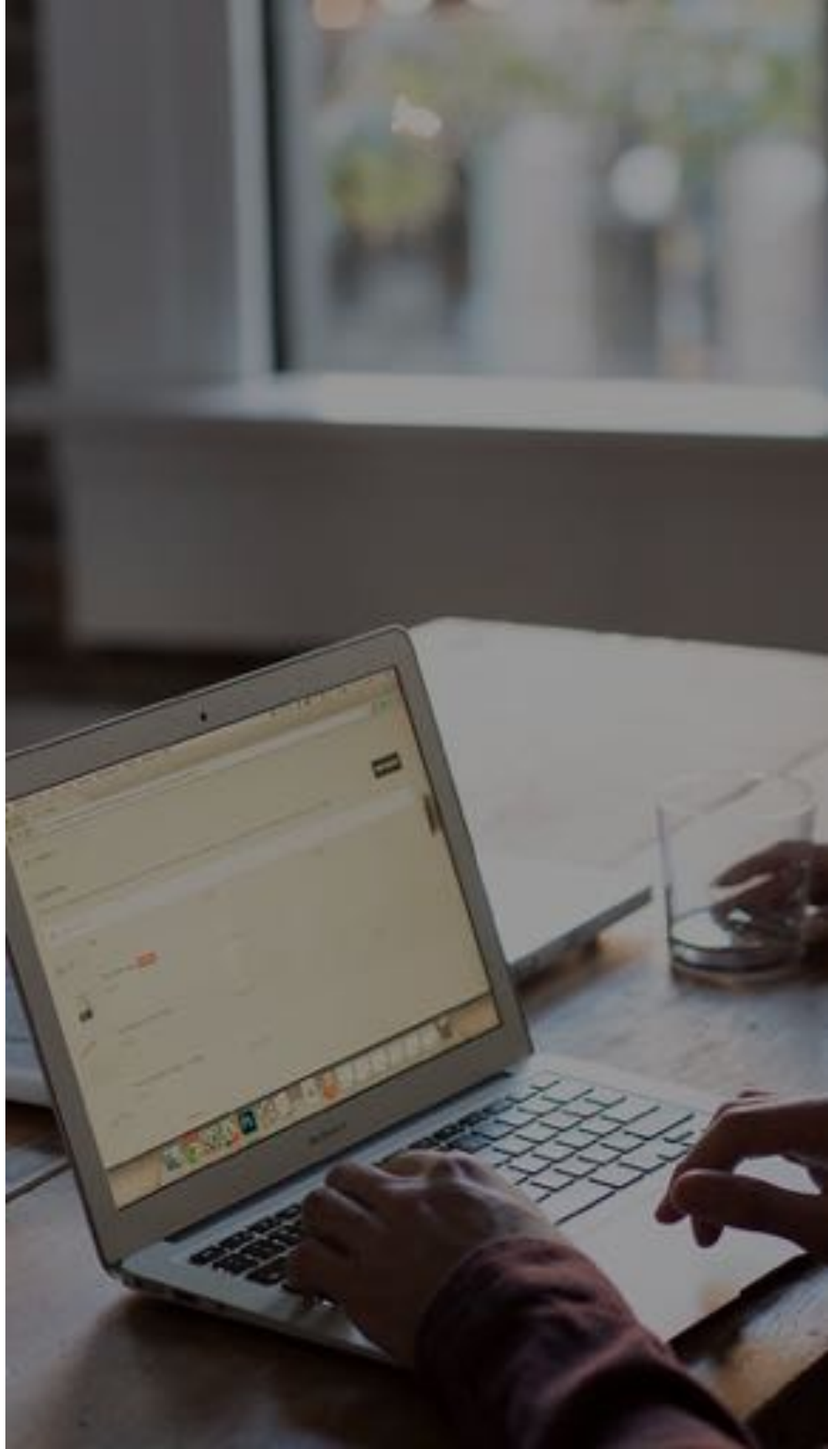


Additional Notes on Reading the Report

Numbers presented have been rounded and sums may not correspond exactly to numbers in the detailed data tables made available.

Throughout the report, arrows are used to indicate a statistically significant results (up or down).

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 this size would be +/- 2.7%, 19 times out of 20.



How has COVID-19 played out in Alberta?

*March 16**
AB announced all K-12 classes suspended

March 12
AB bans all gatherings of 250+ people

March 11
WHO declares COVID-19 a global pandemic

March 5
First reported case in AB

March 17
Public health state of emergency declared in Alberta

March 19
First death due to COVID-19 in AB

April 26
Fort McMurray state of emergency declared due to flooding

*Early May**
Early actions allowed some activities to resume (e.g. golf, boat launches, dental/non-emerg. health care, AB parks)

May 14
Relaunch Strategy Stage 1
(excluding Calgary and Brooks)

May 25
Relaunch Strategy Stage 1 for Calgary and Brooks

June 12
Relaunch Strategy Stage 2

Beginning June 5
Black Lives Matter protests and vigils

March | **April** | **May** | **June**

May 21 – June 2
Wave 1 survey in field

*Dates may vary by city

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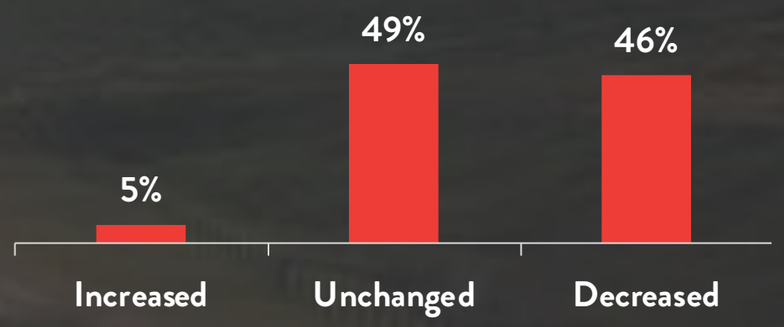
The economic backdrop to the COVID-19 crisis in Alberta is jarring

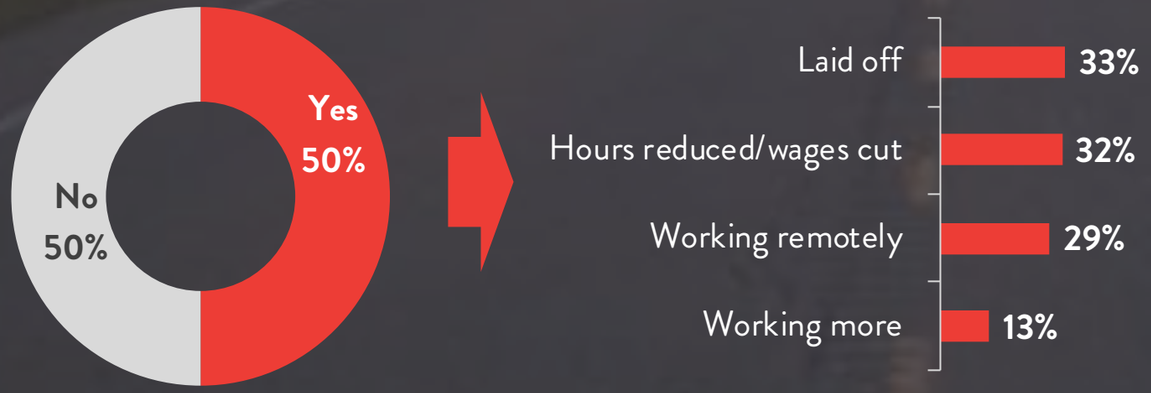
The economic implications of the COVID-19 pandemic across the world are yet to be felt in their entirety but are expected to be significant. In Alberta, the combined energy crisis means economic upheaval is on two fronts and will have a significant impact across sectors in the Experience Economy. Among Albertans:

- 46% have already experienced a decrease in income.
- Among those with work reductions, 73% cite COVID, 22% oil prices.

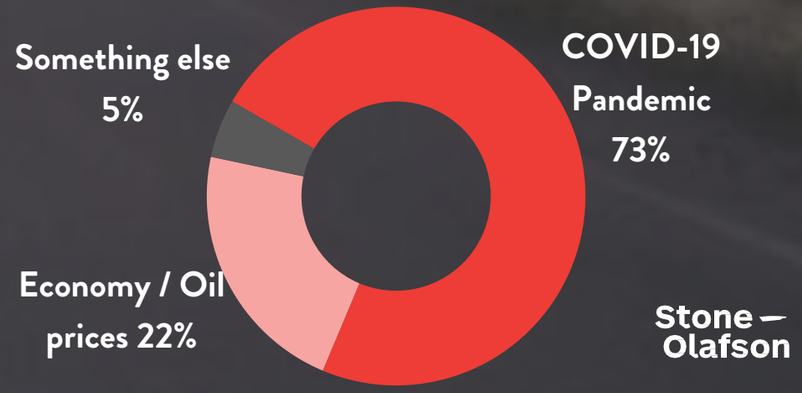
Has your income changed?



Has employment changed since COVID-19?



Reasons for lay-off/wage cut



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The New Normal:

Implications for Alberta Organizations

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What did we learn:

1.

The Experience Economy is massive and there is tremendous overlap across sectors.

Virtually all (99%) of Albertans participate in some form and very few engage in only one sector of the economy. The scope of this economy means implications on closures and activities stoppages extend across sectors and will have far-reaching implications in terms of the economy and the wellbeing of Albertans.

The overlap is confirmation this economy is about shared experiences and audiences. Albertans rarely pursue one activity or art form – they pursue experiences. Organizations in seemingly disparate areas will share audiences – meaning a theatre or art gallery will have the same audiences as a fitness studio or sports organization. So while there is much in common, they are also competing for the same wallets.

How might this apply to you?

- Recognize the shared nature of the sector – audiences are in pursuit of experiences, not necessarily a particular sport or art form.
- In unique and challenging times like this there may be more opportunities to collaborate.
  - Is there a way to cross-promote to reach more people without competition?
  - Could collaboration lead to unique and appealing experiences and offers?
  - Best practices could be easily adapted across the sector – are there things happening in one area that would benefit others? Look for those to incorporate in your teams.

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What did we learn:

2.

Despite the crossover, arts and sports/rec audiences demonstrate some differences in attitudes.

At a general level, arts and culture audiences show a lower comfort levels and higher hesitation about re-engaging. Conversely, sports and recreation audiences are more comfortable. This is more pronounced with exclusive audiences in each area but has implications for each sector.

How might this apply to you?

- For arts and events organizations, it is a reminder that current enthusiasm levels may not immediately translate into ticket sales/participation in the short term, despite what claimed intentions are. Planning should reflect a longer timeframe for return to normal activity levels.
- For sports and rec, organizations are already working on plans to ramp up and must also consider planning to pivot quickly if future waves materialize and activities need to be scaled back again.

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What did we learn:

3.

Understanding intrinsic motivations is the key to re-connecting with audiences.

Motivations for why Albertans participate in activities will be the main pivot points that organizations will need to use to start to think about how to re-attract customers. The primary motivations for attending and participating in events are social and experiential. The need for social connections and the current absence of them reflects why we are seeing a surge in enthusiasm for renewing activities. However, this enthusiasm will not reflect actual behaviours on its own. The other key motivations that cannot be overlooked are related to health (mental and physical)and education. Ultimately, organizations will need to deliver on these motivations as re-opening occurs or risk losing relevancy.

How might this apply to you?

- Ensure you understand the motivations to connect with your organization and how you can meet to satisfy them.
- Make this a priority before driving awareness or simply connecting with customers. If you aren't meeting those motivations, there will be challenges.
- Use this to build your 'substitution' activities, to develop your ongoing engagement efforts, and to direct your recovery planning:
  - To what degree can you facilitate the social connections people are craving now?
  - How do you deliver meaningful & authentic experiences now and post-pandemic?

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What did we learn:

4.

Albertans are challenged to substitute experiences and fatigue is setting in.

Social connections are one element that Albertans are missing most and yet, they can be replicated somewhat successfully through digital means. However, there is a limit to how effective that is long term; most people are showing signs of fatigue and substitutions are not likely to last in their current form. Furthermore, whatever social elements can be replicated, there is no substitution for the experiential elements of most activities. Albertans are least engaged in virtual live experiences (such as exhibits or tours) because they just don't satisfy the same motivations. Organizations need to be aware that there will be opportunities to continue virtual live experiences post-restrictions but there are limits.

How might this apply to you?

- Evaluate your ability to meet their motivations and add value through virtual live experiences. If not, then look at these substitutions as a companion to the real thing.
- Virtual live experiences can be a good tool – they are part of the larger engagement cycle. Keep that in mind and avoid the temptation to simply replicate the real thing.
- If you do develop them, leverage the unique advantages of virtual experiences and build around those.

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What did we learn:

5.

Comfort levels will dictate re-engagement, not past behaviour.

Some audiences are showing greater hesitation to engage with activities than others and it is primarily due to lower comfort levels – speed of re-opening, comfort with large groups, etc. For individual sectors, this means a deep understanding of who your audience was – you can then better assess what the impacts will be on your organization and audience. On a basic demographic level, those under 35 years of age and females are groups that show distinct differences in attitudes and comfort levels. If they drive ticket sales, sign-ups, or impact direct participation for you, it may be more important to focus your messaging and offers on them to make them more comfortable.

How might this apply to you?

- Recognize that key decision makers for your organization may be more hesitant to re-engage. Your messaging not only needs to calm the hesitation, but leverage motivations.
  - Having safeguards in place will be table stakes from an operational and perceptual perspective – show them.
  - Then remind them why they loved to come.

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What did we learn:

6.

The overlap of economic concern is emerging and will only complicate planning over time.

Right now, economic concerns as a barrier to re-engaging are not a primary consideration as long as comfort levels are still lower. This will likely shift over the coming months as the economic realities continue to set in and Alberta households have to make recreation and discretionary spending decisions. Currently 46% of Albertans surveyed have experienced an income reduction amid the pandemic. Among those with reduced hours or laid off, the majority cite COVID-19 but 22% cite oil price/energy crisis. It is a stark reminder of the challenging circumstances in the Alberta market.

How might this apply to you?

- Spending power of most audiences will be impacted over the longer term because larger portions of your market are facing economic uncertainty.
  - Evaluate your pricing strategies to ensure a balance of value offers to avoid alienating parts of the market on price alone.
  - Consider promotional strategies that support that notion of value.
  - Expect a different type of consumer who is more value conscious, often with higher expectations.

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What did we learn:

7.

A less optimistic outlook continues to exist.

The extended period of economic uncertainty that preceded the pandemic and the most recent crash in the economy has fostered a fragile consumer mindset. Audiences are no longer brimming with optimism. Just over a third are worried about what's happening, and three-quarters acknowledge that things are no longer going to be the same. Ultimately, this malaise brings forth a different mindset – one with its own set of opportunities and challenges.

How might this apply to you?

- Organizations can appeal to audiences by tapping into unarticulated motivations that likely come with a market of this kind – escapism & comfort. Building and evolving experiences that tap into that may garner more attention/engagement than previously thought.

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Understanding Behaviours

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How do Albertans engage with the Experience Economy?

Engagement with the experience economy takes many forms. Some are actively engaged across sectors and others are engaged more passively. For the purposes of this work, we consider Albertans 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.

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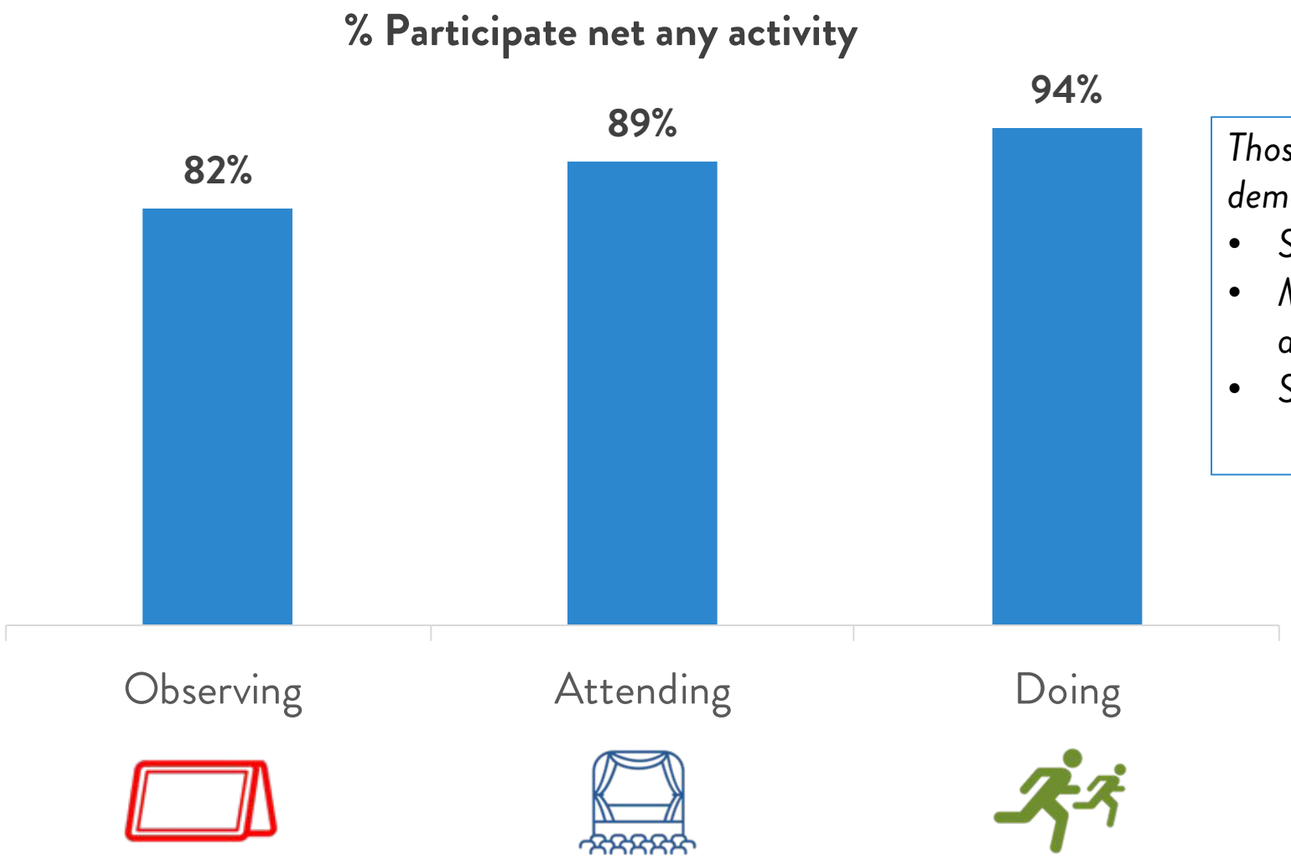
To what degree did Albertans regularly engage prior to the COVID-19 Pandemic?

The rates of participation in the province across engagement type varied – but the high degree of overlapping sectors and activities within the Experience Economy means the demographic profile of audiences vary only a little.

*Those that **observe** and **attend** tend to look most closely like the general population. Attendees are slightly more wary about interacting with people they don't know in group settings (which has implications for a return to attendance patterns)*



*Those that **do** have a slightly different demographic profile:*

- *Slightly younger*
- *More likely to have kids (reflected in activities)*
- *Slightly higher incomes*

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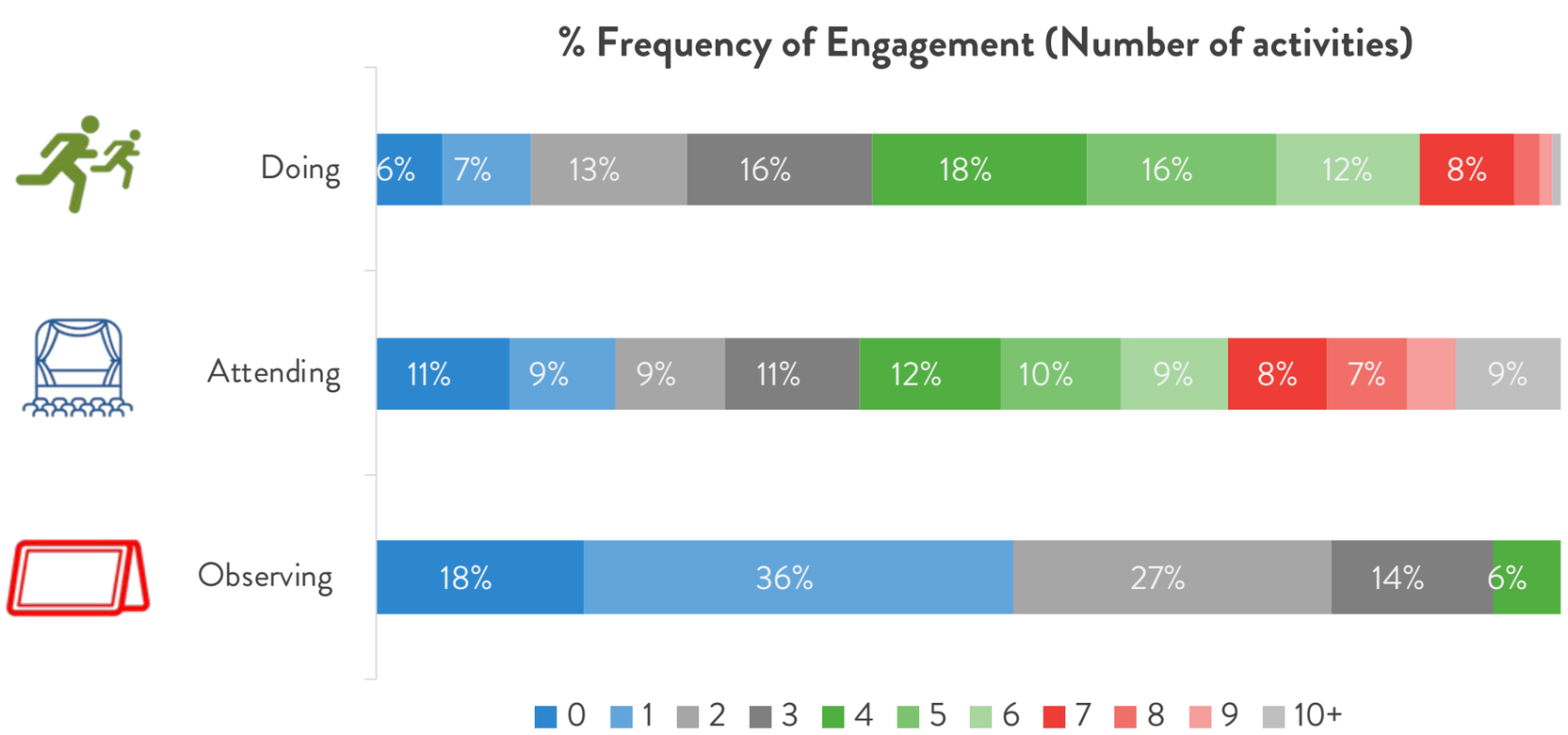
But the intensity of engagement does vary

Some Albertans reported engaging in only 1 or 2 activities in a category; others show strong engagement across categories and engage in a wider variety of activities. Attendance based activities have the farthest reach – Albertans collectively attend more events than they participate in other categories.



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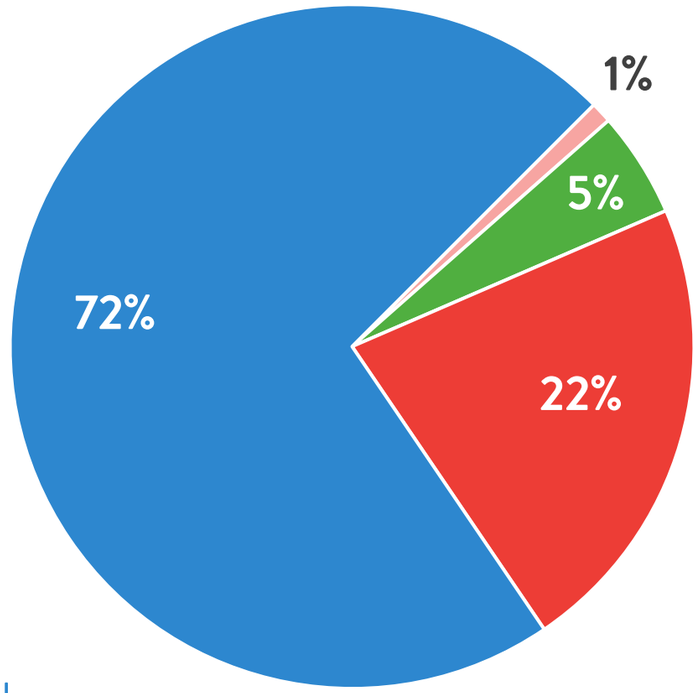
What does intersection of engagement look like?

It is not enough to explore the different types of engagement. It is important to also understand what the intersection of engagement looks like – that is, the proportion of audiences who participate in different ways (observe, attend, or do).

99% of Albertans participate in the Experience Economy in some form and this all-encompassing nature demonstrates how far reaching the social, mental health and quality of life implications are for Albertans.



Detached
(do not participate in any part of the experience economy)

Singular
(participate in only one category of engagement)

Plural
(participate in two categories of engagement)

Multiple
(participate in all three categories of engagement)

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Exploring the intersection of sectors

Because the Experience Economy encompasses any sector that relies on live group experiences, it is useful for organizations to understand what the intersection of the economy looks like at a sector level. Because arts & culture and sports & rec have the widest variety of activities that fall within, exclusive participation rates exclude those sectors only.

Travel:

Festivals:

Sports & Rec:

Arts & Culture:

The proportion of Albertans who exclusively travel or attend festivals (without any cross participation in the arts or sports/rec) is negligible.

Exclusive participation in sports and rec is the highest but cross participation in sports & rec and arts & culture still shows the interconnectedness of the economy ecosystem.

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How do Albertans Observe?

Passive observation (from home/digital means) shows consistency across the province. Major centre residents are slightly more likely to watch live sports and live concerts.

	% Observe Regularly	Calgary *n=499*	Edmonton *n=497*	North *n=101*	Central *n=131*	South *n=120*
Download podcasts/music/ other online content	**50%**	52%	48%	41%	47%	53%
Watch live sports on TV/online	**48%**	49%	54%	44%	40%	42%
Watched other live performances on TV/online (comedy, dance, etc.)	**36%**	36%	40%	35%	36%	29%
Watch live concerts on TV/online	**20%**	23%	21%	21%	15%	18%
None of these	**18%**	15%	15%	22%	22%	21%

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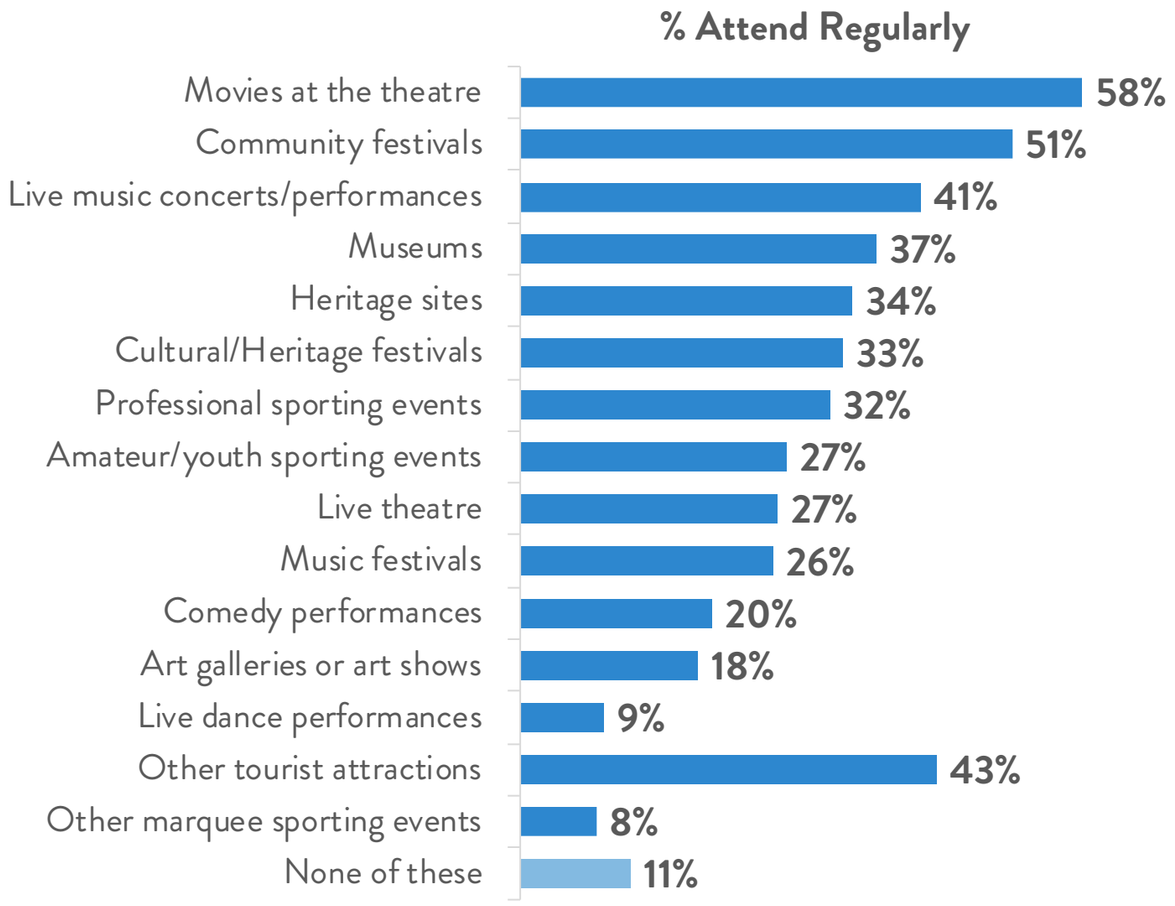
Q8. Prior to the COVID-19 pandemic, which of the following did you do on a regular basis?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

What do Albertans Attend?

The activities that Albertans attended prior to COVID-19 are varied - movies, community festivals and live music are among the most popular activities. Only 11% of Albertans do not attend any of these on a regular basis.



4.6

The average number of events attended by Albertans prior to COVID.

Q9. Prior to the COVID-19 pandemic, please indicate which of the following you used to attend on a regular basis?
Base: Main sample (n=1040)

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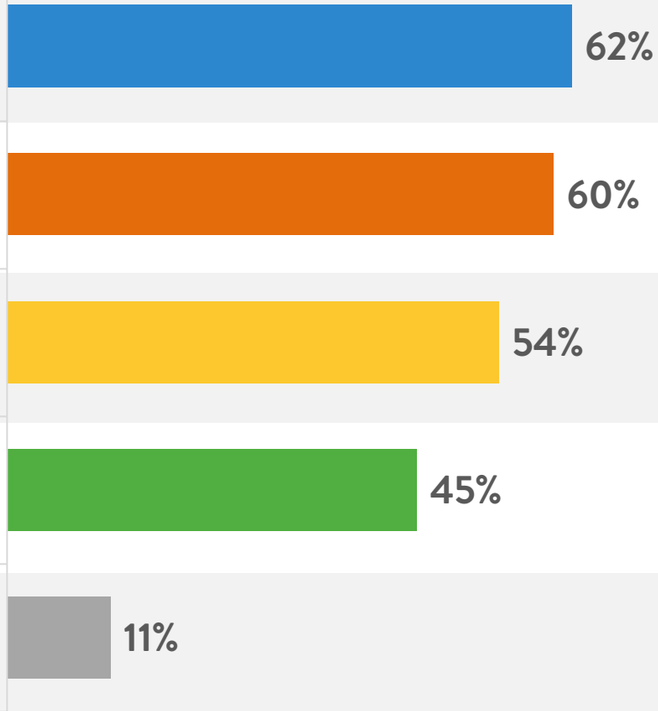
Attendance patterns by region show only small differences

Edmontonians gravitate towards festivals but are less active overall while Southern Albertans gravitate to attraction-type activities. Across the board, sporting events have a slightly higher attendance in major centres and Northern Alberta.



	Calgary n=499	Edmonton n=497	North n=101	Central n=131	South n=120
Festivals	64%	70%	55%	59%	49%
Museums/Tourist Attractions	61%	61%	60%	59%	65%
Live performances	55%	60%	48%	45%	50%
Sporting events	47%	47%	46%	41%	39%
None of these	9%	10%	11%	14%	14%

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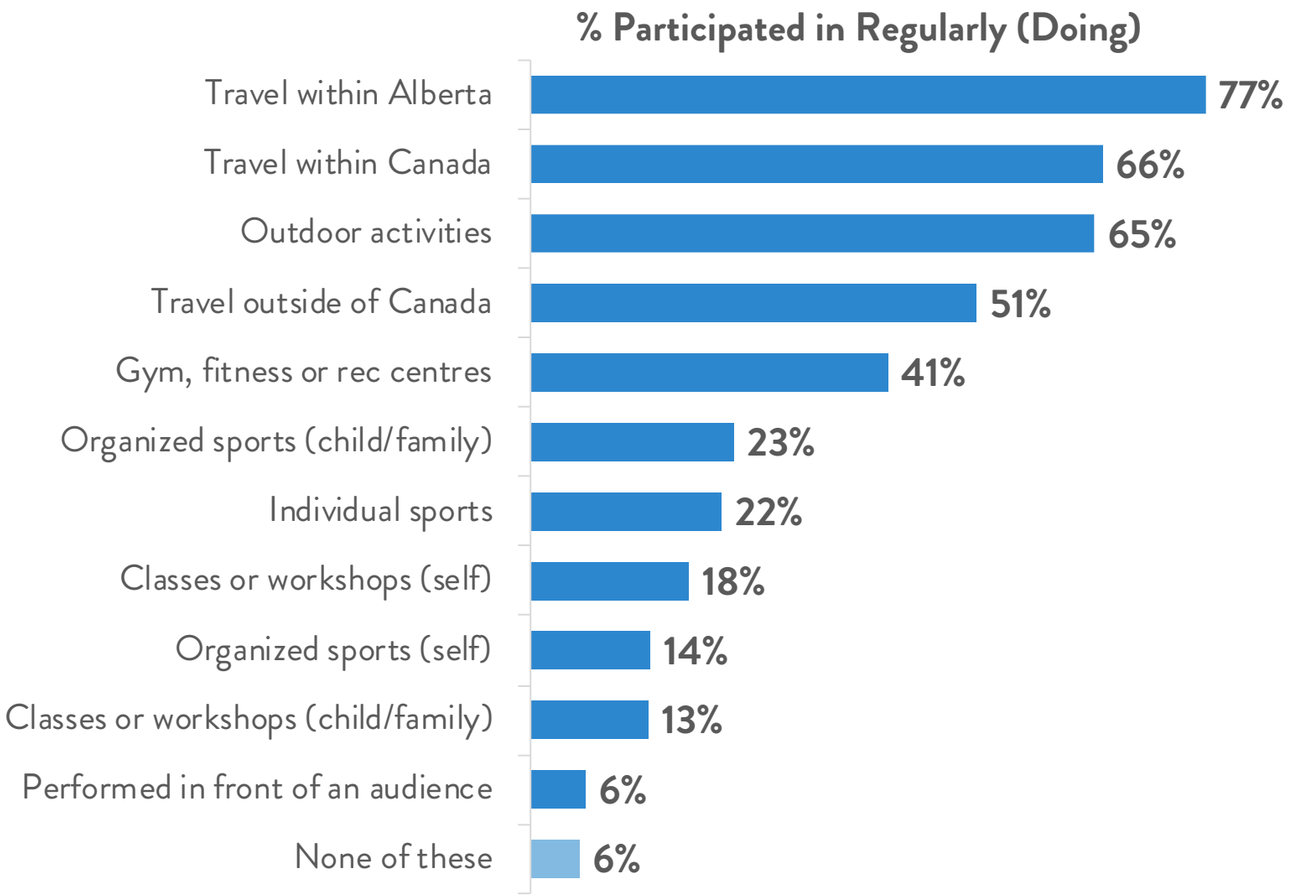
Q9. Prior to the COVID-19 pandemic, please indicate which of the following you used to attend on a regular basis?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

And how did Albertans participate firsthand?

Nearly all Albertans "did" something in the experience economy – fully 94%. Travel and recreational pursuits are among the most common participation activities and about 4 in 10 Albertans also participated in sports in some (net) capacity.



4.0

The average number of activities Albertans participated in regularly prior to COVID.

Q11. And, prior to the COVID-19 pandemic, please indicate which of the following you used to participate in on a regular basis?
Base: Main sample (n=1040).

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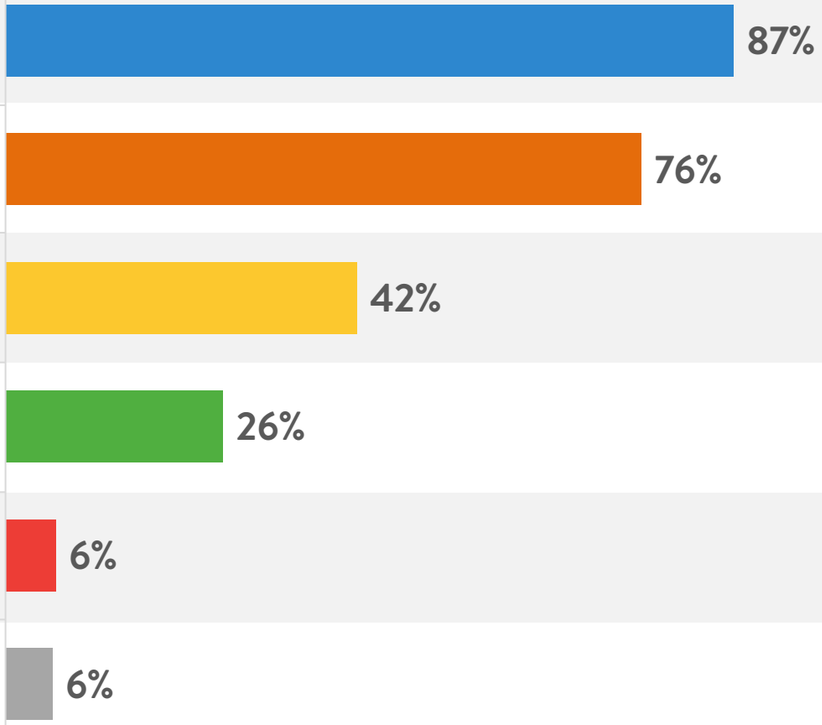
And how did Albertans participate firsthand?

Edmontonians gravitated towards festivals but reported being less active overall while Southern Albertans gravitated to attraction-type activities. Across the board, sporting events had slightly higher attendance in major centres and Northern Alberta.



% Do Regularly – NET Activity		Calgary n=499	Edmonton n=497	North n=101	Central n=131	South n=120
Travel	87%	85%	90%	88%	87%	88%
Recreation	76%	75%	73%	76%	82%	68%
Sport	42%	41%	41%	45%	39%	41%
Classes/Workshops	26%	27%	30%	32%	26%	17%↓
Performances	6%	6%	7%	6%	6%	7%
None of these	6%	6%	5%	5%	4%	6%

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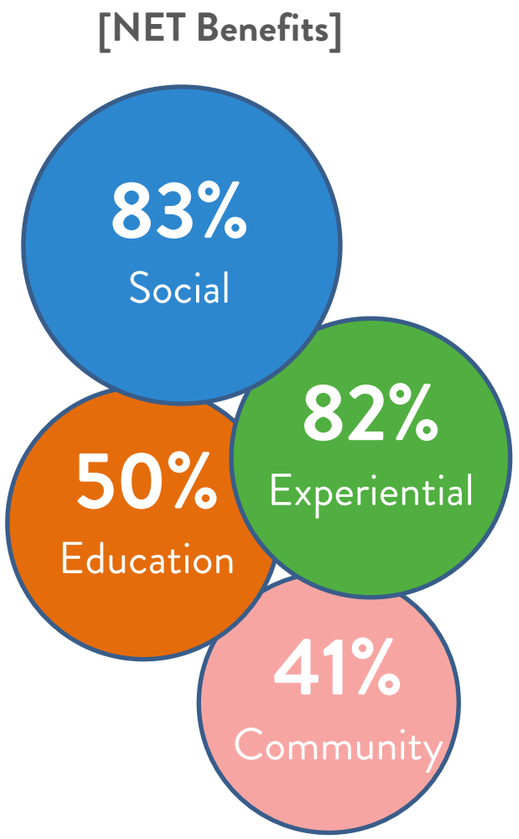
Q11. And, prior to the COVID-19 pandemic, please indicate which of the following you used to participate in on a regular basis?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

The core benefits of attendance-based activities are primarily centered around entertainment and socialization

Because social benefits are so important for attendance-based activities and Albertans are missing social connections most, there is a general surge of enthusiasm to re-engage. However, actual intentions will be more closely tied comfort levels than enthusiasm.



Q10. Broadly speaking, what are some of the main reasons you attend these activities?
Base: Main sample (n=1040)

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Patterns of motivation are consistent across the province but do show variance by audience type and demographics

% Motivations for Attendance	Total Alberta	Gender		Age		
		Female *n=502*	Male *n=527*	18-34 *n=336*	35-54 *n=359*	55+ *n=345*
Just to be entertained/have fun	77%	77%	77%	85% ↑	80%	66% ↓
To get out of the house and be social	57%	59%	55%	67% ↑	56%	47% ↓
To socialize with my friends	53%	54%	52%	67% ↑	52%	41% ↓
Spend time with my family	50%	54%	47%	52%	60% ↑	39% ↓
To support my community	41%	44%	37% ↓	43%	41%	38%
Learn something new/educate myself	40%	44%	35% ↓	45%	34% ↓	42%
To try something unique/different	34%	38% ↑	30% ↓	41% ↑	34%	26% ↓
To be with people who share the same interests	33%	35%	32%	35%	32%	33%
Escape my everyday life	32%	27% ↓	36% ↑	37%	33%	26% ↓
Learning/enrichment with my kids	24%	26%	21%	22%	36% ↑	11% ↓
To feel part of a group/connected to others	19%	20%	19%	27% ↑	17%	14% ↓
Be a part of something exclusive/special	18%	17%	18%	20%	18%	14%
To meet new people	14%	12%	15%	14%	14%	13%
To network with colleagues/clients	9%	7% ↓	11%	12%	11%	5% ↓

Q10. Broadly speaking, what are some of the main reasons you attend these activities?
Base: Main sample (n=1040)

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The overlap within sectors means motivations by audience are similar – with the exception of sector-exclusive audiences who show some unique motivational differences

% Motivations for Attendance	Total Alberta	Audience Type (Net participated)			Exclusive Participants	
		Arts/ Culture *n=788*	Sports/ Rec *n=886*	Travel *n=909*	Arts/ Culture *n=79*	Sports/ Rec *n=177*
Just to be entertained/have fun	77%	84% ↑	80% ↑	81% ↑	79%	62% ↓
To get out of the house and be social	57%	65% ↑	60% ↑	60% ↑	47%	34% ↓
To socialize with my friends	53%	61% ↑	57% ↑	56% ↑	34% ↓	31% ↓
Spend time with my family	50%	57% ↑	55% ↑	54% ↑	33% ↓	36% ↓
To support my community	41%	48% ↑	44% ↑	44% ↑	33%	22% ↓
Learn something new/educate myself	40%	50% ↑	42% ↑	43% ↑	46%	9% ↓
To try something unique/different	34%	41% ↑	36% ↑	37% ↑	27%	9% ↓
To be with people who share the same interests	33%	40% ↑	35% ↑	35% ↑	37%	13% ↓
Escape my everyday life	32%	35% ↑	33%	33%	30%	21% ↓
Learning/enrichment with my kids	24%	29% ↑	27% ↑	26% ↑	7% ↓	10% ↓
To feel part of a group/connected to others	19%	23% ↑	21% ↑	20%	10%	9% ↓
Be a part of something exclusive/special	18%	22% ↑	20% ↑	19% ↑	10%	6% ↓
To meet new people	14%	17% ↑	14%	14%	10%	2% ↓
To network with colleagues/clients	9%	11% ↑	11% ↑	10% ↑	4%	5%

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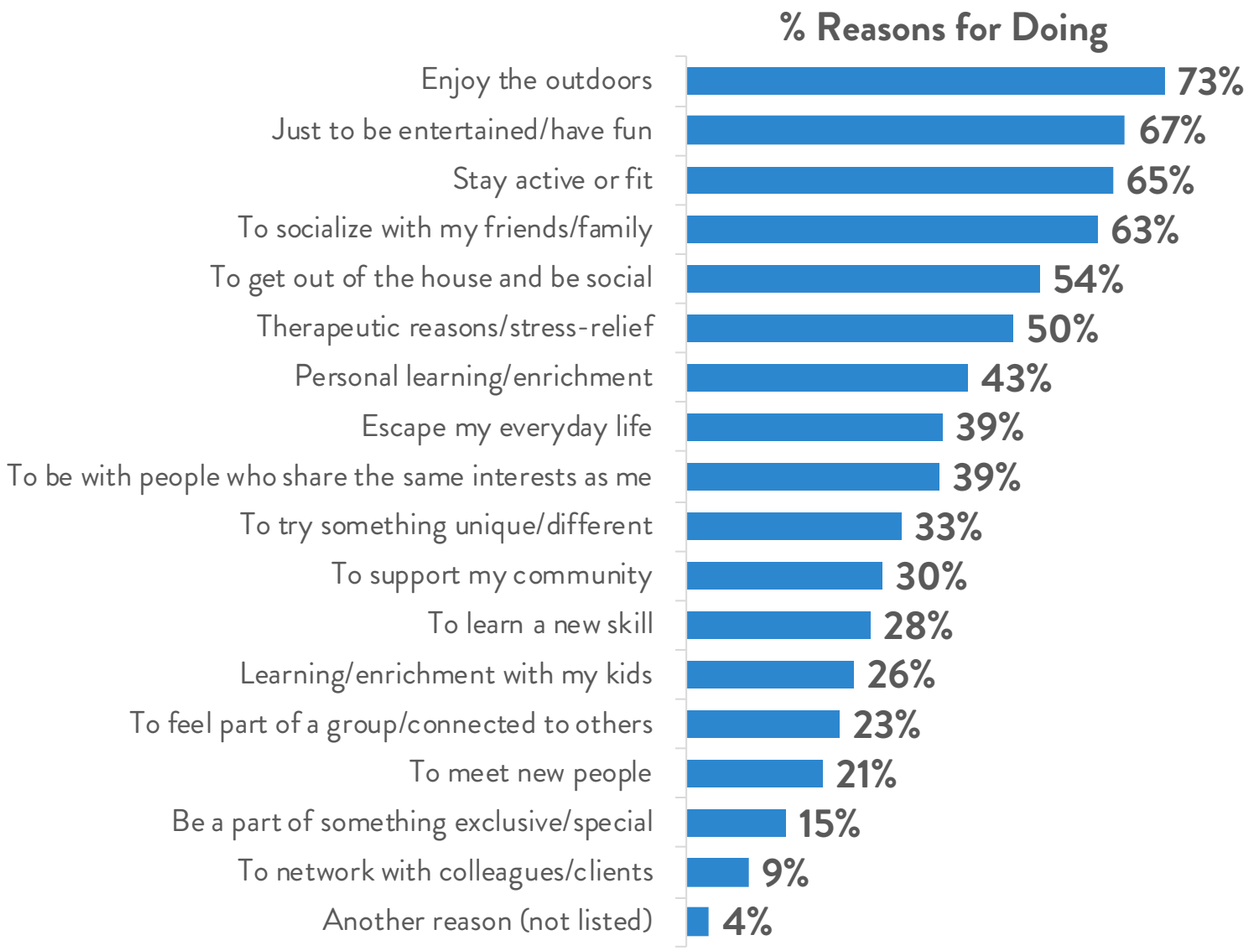
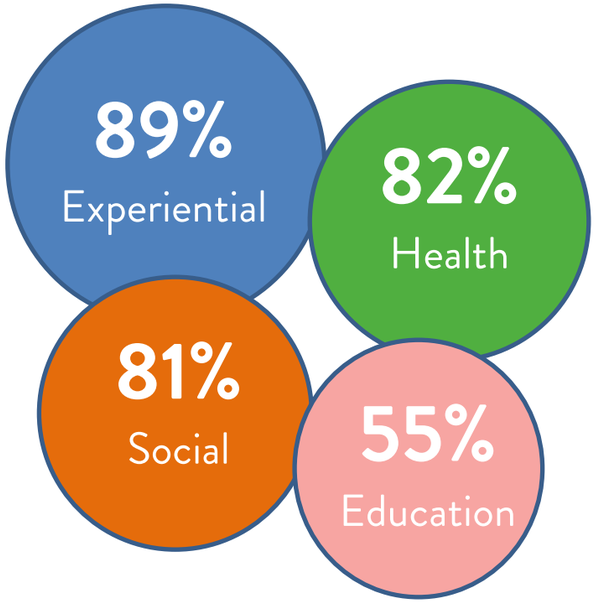
Q10. Broadly speaking, what are some of the main reasons you attend these activities?
Base: Main sample (n=1040)

Staying active and therapeutic relief become nearly as important as entertainment/socialization for participation benefits

Overall health (including mental health) emerges as a strong motivation for "doing" activities. The difference in motivations across activity type mean substitutions will only resonate long term if they reflect these.



[NET Benefits]



Q12. Broadly, what are some of the main reasons that you chose to participate in these activities.
Base: Main sample (n=1040)

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Similarly for attendance, the prime motivators for participation shift by audiences and demographics

% Motivations for Participation	Total Alberta	Gender		Age		
		Female *n=480*	Male *n=493*	18-34 *n=321*	35-54 *n=344*	55+ *n=317*
Enjoy the outdoors	73%	74%	72%	72%	77%	69%
Just to be entertained/have fun	67%	69%	65%	74% ↑	69%	58% ↓
Stay active or fit	65%	66%	64%	72% ↑	70%	52% ↓
To socialize with my friends/family	63%	67% ↑	58% ↓	69% ↑	62%	57% ↓
To get out of the house and be social	54%	54%	54%	62% ↑	54%	46% ↓
Therapeutic reasons/stress-relief	50%	52%	48%	58% ↑	55%	36% ↓
Personal learning/enrichment	43%	45%	40%	48%	41%	40%
Escape my everyday life	39%	36%	41%	45%	42%	29% ↓
To be with people who share the same interests	39%	39%	39%	37%	38%	41%
To try something unique/different	33%	35%	30%	41% ↑	32%	25% ↓
To support my community	30%	34% ↑	26% ↓	32%	30%	27%
To learn a new skill	28%	31%	24% ↓	41% ↑	25%	18% ↓
Learning/enrichment with my kids	26%	29%	22%	27%	39% ↑	8% ↓
To feel part of a group/connected to others	23%	26%	21%	27%	24%	19%
To meet new people	21%	22%	20%	24%	17%	22%
Be a part of something exclusive/special	15%	14%	16%	18%	15%	12%
To network with colleagues/clients	9%	8%	10%	11%	11%	7%

Younger age groups have a stronger set of motivations related to health. Older groups have softer motivations overall for participation but are more loosely focused on social and entertainment.

Q12. Now, what are some of the main reasons that you chose to participate in these activities
Base: Participate in activity (n=982)

Stone – Olafson

Sector-exclusive audiences are small – but their intrinsic motivations are starkly different

% Motivations for Participation	Total Alberta	Audience Type (Net participation)			Exclusive Audiences	
		Arts/ Culture *n=774*	Sports/ Rec *n=877*	Travel *n=909*	Arts/ Culture *n=69*	Sports/ Rec *n=172*
Enjoy the outdoors	73%	74%	77% ↑	75% ↑	42% ↓	76%
Just to be entertained/have fun	67%	71% ↑	69% ↑	69% ↑	61%	53% ↓
Stay active or fit	65%	69% ↑	71% ↑	65%	17% ↓	59%
To socialize with my friends/family	63%	67% ↑	65% ↑	65% ↑	43% ↓	49% ↓
To get out of the house and be social	54%	59% ↑	56% ↑	56% ↑	37% ↓	37% ↓
Therapeutic reasons/stress-relief	50%	53% ↑	53% ↑	51%	27% ↓	41%
Personal learning/enrichment	43%	50% ↑	45% ↑	44% ↑	39%	20% ↓
Escape my everyday life	39%	41%	40%	40% ↑	28%	32%
To be with people who share the same interests	39%	43% ↑	41% ↑	40% ↑	30%	28% ↓
To try something unique/different	33%	37% ↑	33%	35% ↑	30%	14% ↓
To support my community	30%	35% ↑	32% ↑	31% ↑	19%	12% ↓
To learn a new skill	28%	34% ↑	30% ↑	29%	15%	8% ↓
Learning/enrichment with my kids	26%	29% ↑	28% ↑	26%	9% ↓	14% ↓
To feel part of a group/connected to others	23%	27% ↑	25% ↑	25% ↑	13%	10% ↓
To meet new people	21%	24% ↑	22% ↑	22%	10%	9% ↓
Be a part of something exclusive/special	15%	18% ↑	16% ↑	16%	8%	5% ↓
To network with colleagues/clients	9%	11% ↑	10%	10% ↑	4%	5%

Sports audiences are more motivated by the activity itself which means the broader set of motivations is lower overall and the activities used to engage may be narrower.

Q12. Now, what are some of the main reasons that you chose to participate in these activities
Base: Participate in activity (n=982)

Stone – Olafson

Interest levels by sector are a helpful indicator of engagement, regardless of comfort levels

General recreation generates the highest interest levels which means it drives much of the engagement in the sports & rec category. As standalones, arts & culture and sport have a slightly more narrow audience in terms of overall interest.

	% Interested	Calgary n=499	Edmonton n=497	North n=101	Central n=131	South n=120
Recreation (outdoor activities, fitness, camping, fishing, skiing, running, etc.)	83%	82%	81%	91%	90%	79%
Arts and Culture (theatre, music, writing, museums, etc.)	61%	65%	68%	62%	55%	54%
Sport (watching or participating in professional, amateur or organized sport)	52%	56%	54%	56%	45%	50%

Very interested | Interested | Not very interested | Not at all interested

Stone — Olafson

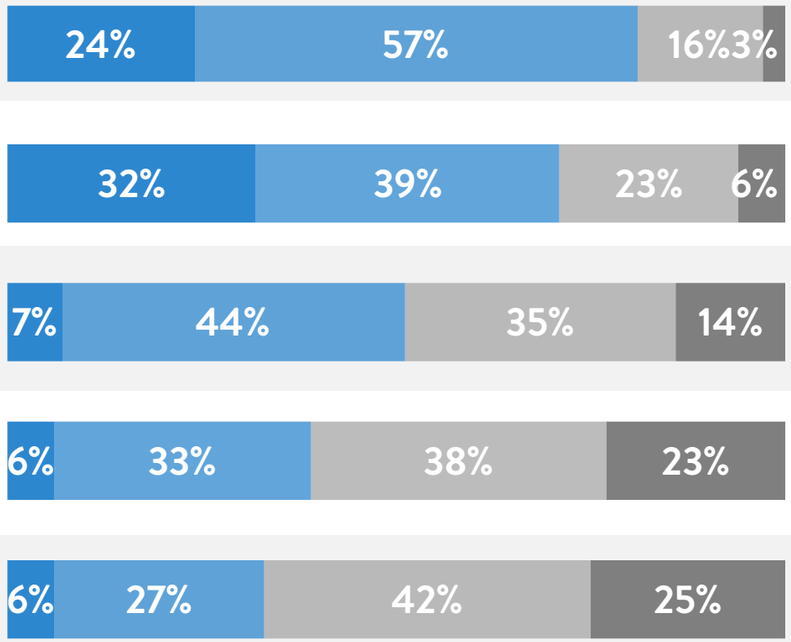
Q7. Thinking about the following areas, how personally interested are you in….?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Engagement and Substitution Activities

Stone — Olafson

With the strongest motivator removed for the past couple of months, Albertans are craving social connections – and showing fatigue of the substitutes

Socialization is still missing and with Albertans starting to tire of the substitutes (mainly digital), the challenge facing organizations to engage grows greater. Those who are more engaged across the Experience Economy prior to COVID-19 are more likely to put any nerves aside to resume regular activities but how they do so will hinge on comfort levels.



	% Agree	Calgary n=499	Edmonton n=497	North n=101	Central n=131	South n=120
I value the social connections I have more than ever	81%	83%	82%	74%	83%	85%
I'm getting tired of the substitutes for all the things I used to do	72%	71%	70%	67%	81%	72%
I'm enjoying a lot of the new ways organizations are working to keep me connected	51%	56%	57%	45%	45%	47%
I'm nervous to resume my regular activities but am going to do it anyways	39%	44%	41%	32%	35%	38%
I won't go back to doing things the same way	33%	37%	40%	28%	30%	26%

Completely agree | Agree | Disagree | Completely disagree

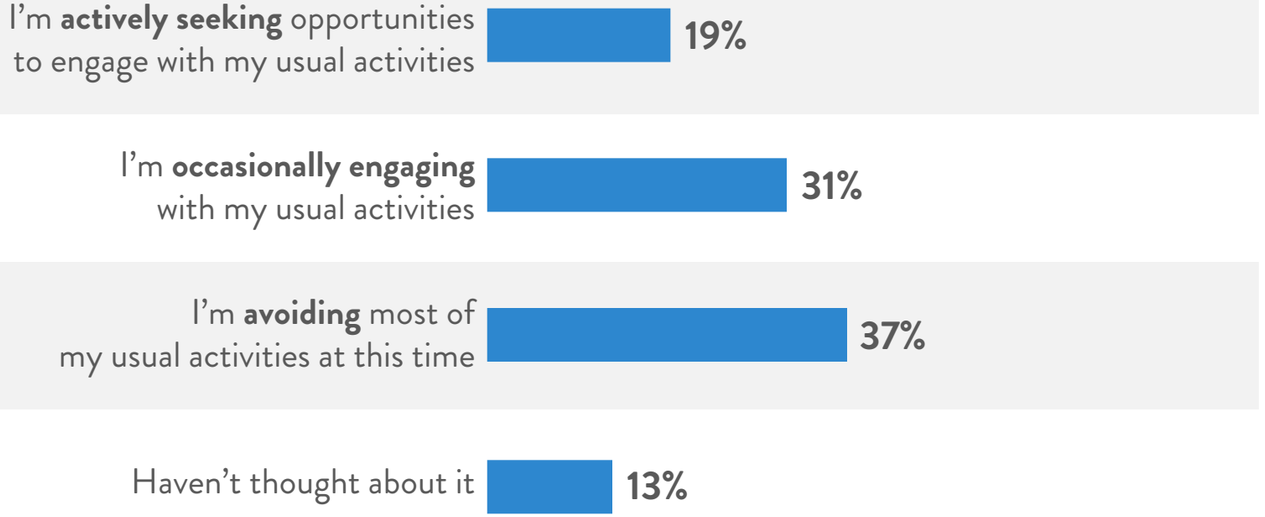
Q16. Now that we've asked you about the ways you have been connecting with organizations and activities throughout restrictions, we'd like to understand how you feel at this time. Please indicate your level of agreement with the following statements.

Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Stone – Olafson

Half of Albertans have been actively or occasionally engaging in their usual activities through different channels

Edmonton and Calgary residents are slightly less likely to actively seek out their activities than those in other areas of the province. Among sector specific audiences, sports enthusiasts are more likely to actively seek out engagement (particularly exclusive sports participants) than arts & culture enthusiasts.



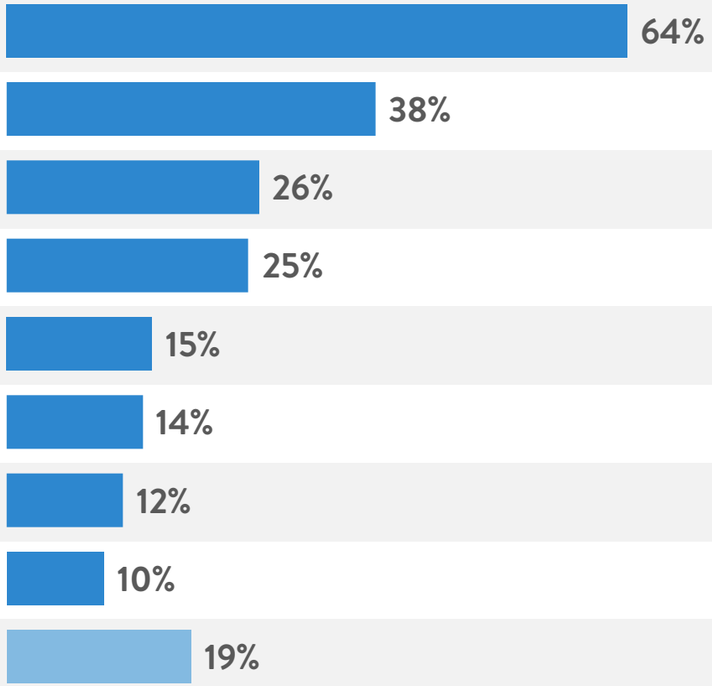
	Calgary *n=499*	Edmonton *n=497*	North *n=101*	Central *n=131*	South *n=120*
I'm **actively seeking** opportunities to engage with my usual activities	22%	15%	26%	25%	22%
I'm **occasionally engaging** with my usual activities	29%	30%	30%	29%	32%
I'm **avoiding** most of my usual activities at this time	38%	42%	29%	30%	33%
Haven't thought about it	10%	13%	16%	16%	13%

Q13. Since restrictions on gatherings in Alberta were implemented in mid-March, organizations having 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: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Stone — Olafson

How are Albertans connecting to activities during isolation?

About 8-in-10 Albertans are relying on some form of digital engagement during restrictions, with females and those under 35 participating in a higher number. Engagement also shows variance across the province: interviews/live sessions with experts have greater resonance in Calgary and Edmonton; virtual tours/exhibits have lower uptake overall but more evenly across the province.



Have done during restrictions:		Calgary n=499	Edmonton n=497	North n=101	Central n=131	South n=120
Video calls with family/friends	64%	67%	66%	57%	61%	59%
Watch past or pre-recorded events	38%	39%	39%	32%	38%	31%
Watch/listen to interviews with athletes, etc.	26%	28%	30%	24%	18%	23%
Watch live events/special performances	25%	27%	28%	25%	17%	23%
Participate in online fitness classes	15%	20%	15%	8%	12%	11%
Live Q&A sessions with experts	14%	15%	14%	11%	10%	9%
Virtual tours of museums/galleries	12%	15%	12%	14%	10%	10%
Virtual exhibits/experiences	10%	12%	11%	13%	7%	6%
None of these	19%	15%	16%	25%	18%	23%

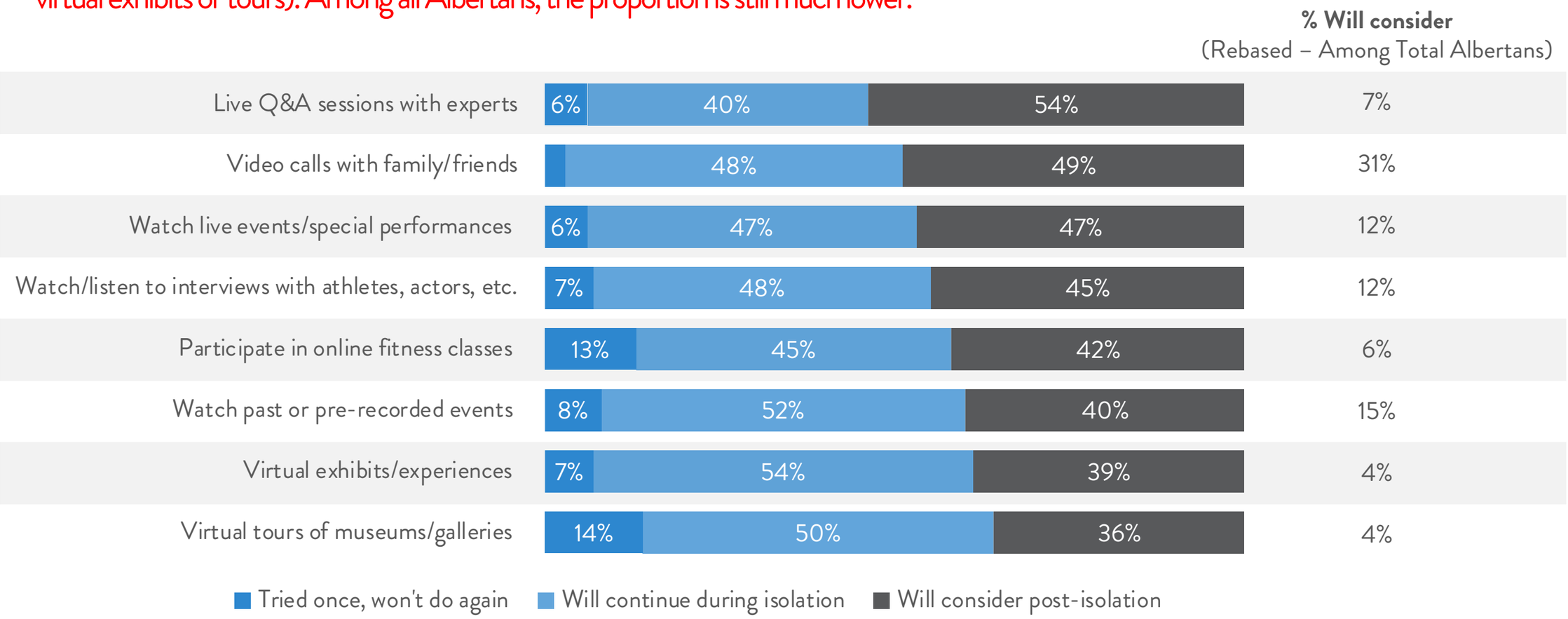
Stone — Olafson

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?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

What will resonate post-isolation?

While there is an opportunity to continue to engage in digital experiences (that match motivations) once restrictions are lifted, there is clear evidence of fatigue. **Substitutions alone are not satisfying the main motivations to engage in a sustainable way.**

Only about half of Albertans who have already participated in an activity will consider live sessions or events post-isolation (fewer still will engage in virtual exhibits or tours). Among all Albertans, the proportion is still much lower.



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: Have participated in activity (n=varies)

Albertans miss socialization more than one specific activity.

Socialization is a key motivation for engaging in activities – reflecting on what is "missed most" is a reminder that engagement is actually less about specific activities than the benefits they provide and re-engagement efforts will be more successful by focusing on these benefits.

	% Miss the Most	Calgary *n=422*	Edmonton *n=423*	North *n=85*	Central *n=115*	South *n=105*
Interacting / visiting / socializing / hugging	36%	38%	39%	31%	31%	30%
Going to restaurants /dining out	12%	12%	12%	14%	6%	12%
Shopping / going to malls	9%	8%	8%	11%	9%	9%
Freedom / living life / free to do what I want	7%	7%	7%	7%	8%	7%
Travelling / going on vacation	7%	6%	7%	10%	5%	10%
Working / working non-remotely	6%	6%	5%	7%	7%	5%
Exercise / going to the gym / yoga	6%	9%	6%	6%	5%	5%
Watching sports / attending sporting events	6%	6%	7%	3%	5%	5%
Camping / hiking / the outdoors	5%	5%	3%	7%	9%	7%

Stone – Olafson

Q24. Of all the things you used to be able to do, what do you miss the most? (mentions of 5% or greater included)
Base: Provided responses (n=911)

How comfortable are Albertans?

Stone — Olafson

City centres, with higher confirmed cases, are showing a stronger hesitation about re-opening

Opinion on Re-opening		Calgary *n=499*	Edmonton *n=497*	North *n=101*	Central *n=131*	South *n=120*
I think we're moving **too fast**	**29%**	32%	37%	18% ↓	19% ↓	25%
I think we're moving **at the right speed**	**44%**	43%	44%	43%	48%	41%
I think we're moving **too slow**	**27%**	25%	19%	39% ↑	33%	34%

Who thinks we are moving too fast?

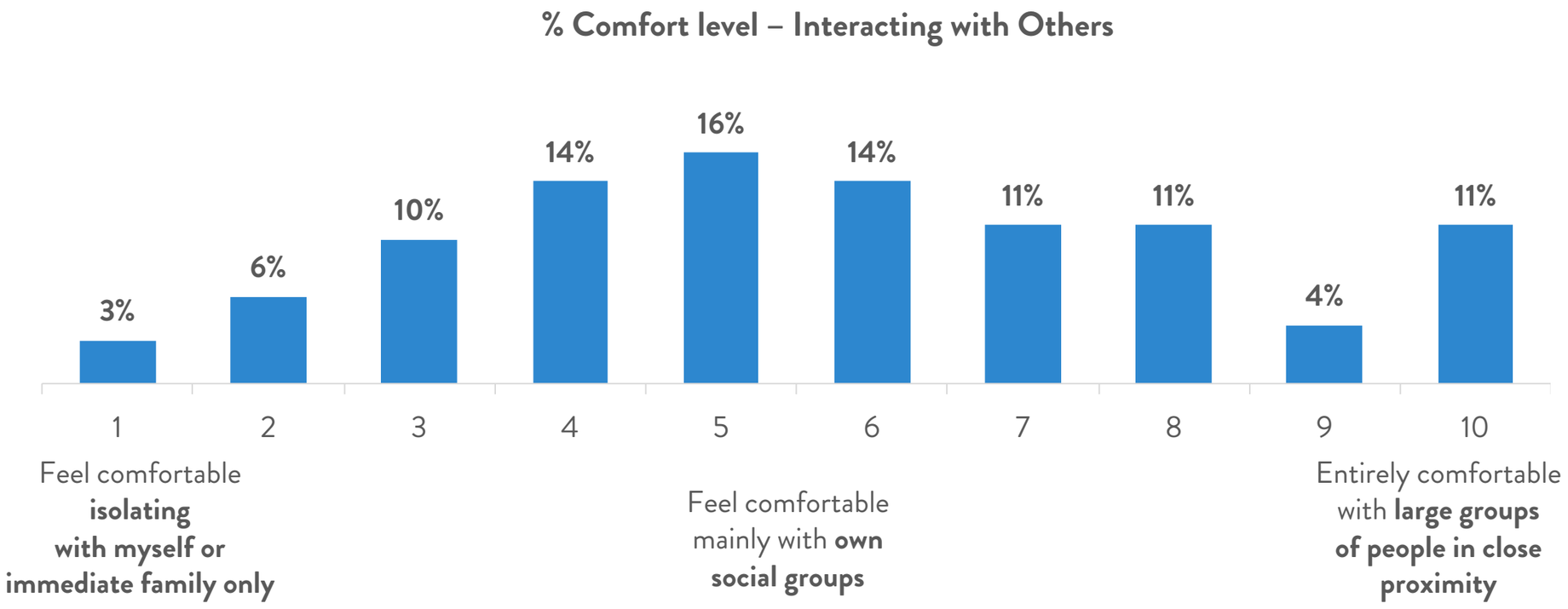
- Females – 35%
- Younger Albertans (18-34 year olds) – 35%
- Arts & culture Enthusiasts – 32%

Stone – Olafson

Q17. Which statement best reflects your personal opinion on the current state of re-opening in Alberta?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Comfort is highest when people are with known social groups

Comfort level of interacting with others directly impacts beliefs on the speed of re-opening: higher comfort levels would like to see the province open faster, and visa versa.



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?
Base: Main sample (n=1040).

Stone – Olafson

Comfort levels in group settings shift primarily along gender lines and audience type

Females are generally less comfortable in larger groups; among audience types, sports enthusiasts have higher comfort levels than arts/culture enthusiasts.

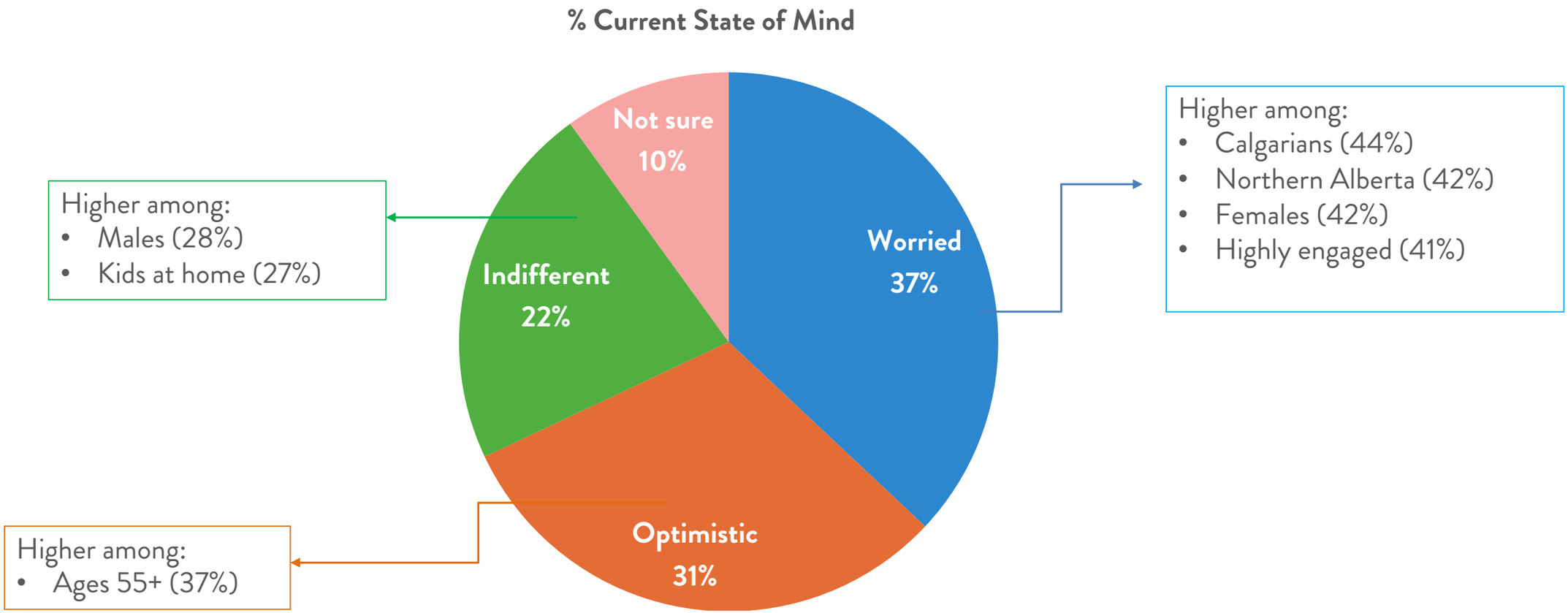
% Comfort Level	Total Alberta	Region					Gender	
		Calgary *n=499*	Edmonton *n=497*	North *n=101*	Central *n=131*	South *n=120*	Female *n=502*	Male *n=527*
High comfort – large groups (8,9,10)	**26%**	25%	23%	39%↑	30%	30%	16% ↓	36%
Medium comfort – own social groups (4,5,6,7)	**55%**	56%	58%	42% ↓	57%	51%	61%↑	50% ↓
Low comfort – self/family groups (1,2,3)	**19%**	19%	19%	19%	13%	19%	23%↑	14% ↓

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?

Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Stone – Olafson

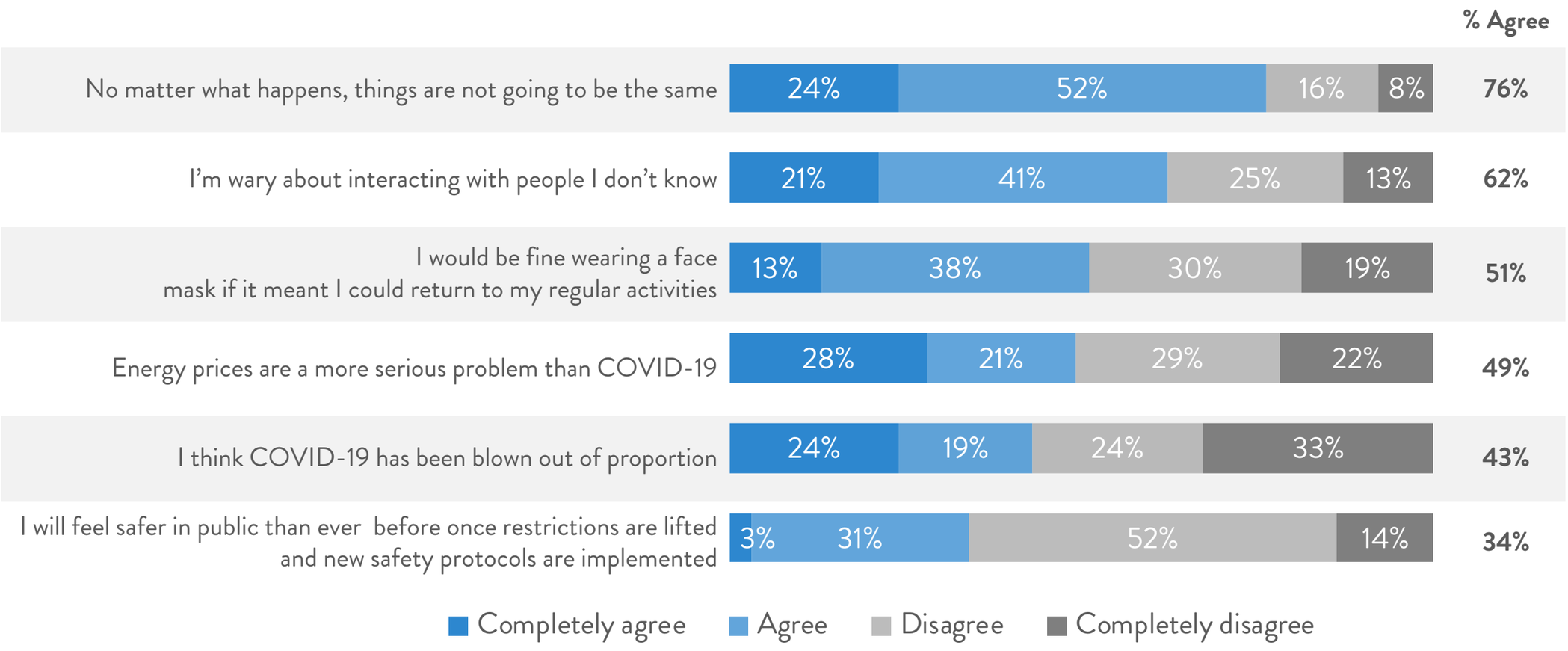
And while feelings are mixed, there remains a high level of worry permeating perceptions and anticipated behaviours



Q22. Given everything that is happening in Alberta, which of the following best describes how you are feeling today?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Perceptions demonstrate the complexity of the issues facing Albertans and organizations serving them

There is a high sense of worry about interacting with people (62%), yet nearly half think COVID-19 has been blown out of proportion (43%) . There is also no guarantee that safety will increase once new protocols are introduced (only 34% agree).



Q20. Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.
Base: Main sample (n=1040).

Stark differences in attitudes emerge by region and demographics

Regionally, city centres are slightly more wary and less likely to view COVID as overblown. Demographically, females and younger age groups (under 35) are more likely to consider measures like face masks in order to return to normal activities.

		Gender		Age			Region				
% Agree (Top2box)	Total Alberta	Female *n=502*	Male *n=527*	18-34 *n=336*	35-54 *n=359*	55+ *n=345*	Calgary *n=499*	Edmonton *n=497*	North *n=101*	Central *n=131*	South *n=120*
No matter what happens, things are not going to be the same	**76%**	83% ↑	70% ↓	77%	72% ↓	81% ↑	80%	81%	65% ↓	71%	77%
I'm wary about interacting with people I don't know	**62%**	71% ↑	53% ↓	67% ↑	57%	62%	68%	66%	47% ↓	53%	58%
I would be fine wearing a face mask if it meant I could return to my regular activities	**51%**	56% ↑	45% ↓	58% ↑	47%	48%	56%	56%	38% ↓	45%	48%
Energy prices are a more serious problem than COVID-19	**49%**	39% ↓	59% ↑	42% ↓	57% ↑	47%	50%	38%	63%↑	60%↑	50%
I think COVID-19 has been blown out of proportion	**43%**	32% ↓	54% ↑	35% ↓	49% ↑	44%	42%	33%	59%↑	59%↑	48%
I will feel safer in public than ever before once restrictions are lifted and new safety protocols are implemented	**34%**	34%	33%	32%	34%	35%	34%	34%	24%	44%↑	38%

Stone — Olafson

Q20. Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

Perceptions also show variance by audience type with arts audiences showing greater apprehension

Arts organizations may need to be prepared for a longer timeframe for return-to-normal operations. Sports & rec have greater permission to move forward but may need plans to scale back quickly if outbreaks occur.

		Audience Type			Exclusive Audience	
% Agree (Top2box)	Total Alberta	Arts/ Culture *n=788*	Sports/ Rec *n=886*	Travel *n=909*	Arts/ Culture *n=79*	Sports/ Rec *n=177*
No matter what happens, things are not going to be the same	**76%**	78%	75%	76%	86%	69% ↓
I'm wary about interacting with people I don't know	**62%**	65% ↑	63%	62%	62%	52% ↓
I would be fine wearing a face mask if it meant I could return to my regular activities	**51%**	55% ↑	51%	51%	62%	38% ↓
Energy prices are a more serious problem than COVID-19	**49%**	46% ↓	50%	50%	36% ↓	64% ↑
I think COVID-19 has been blown out of proportion	**43%**	40% ↓	44%	43%	29% ↓	57% ↑
I will feel safer in public than ever before once restrictions are lifted and new safety protocols are implemented	**34%**	35%	34%	34%	32%	30%

Stone — Olafson

Q20. Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.
Base: Main sample (n=1040)

What do Albertans need to increase comfort?

Statistics remain vitally important as an informational tool to help grow comfort but there is nearly a third of Albertans still looking for a cure/vaccine and another 18% who just need to evaluate over time.

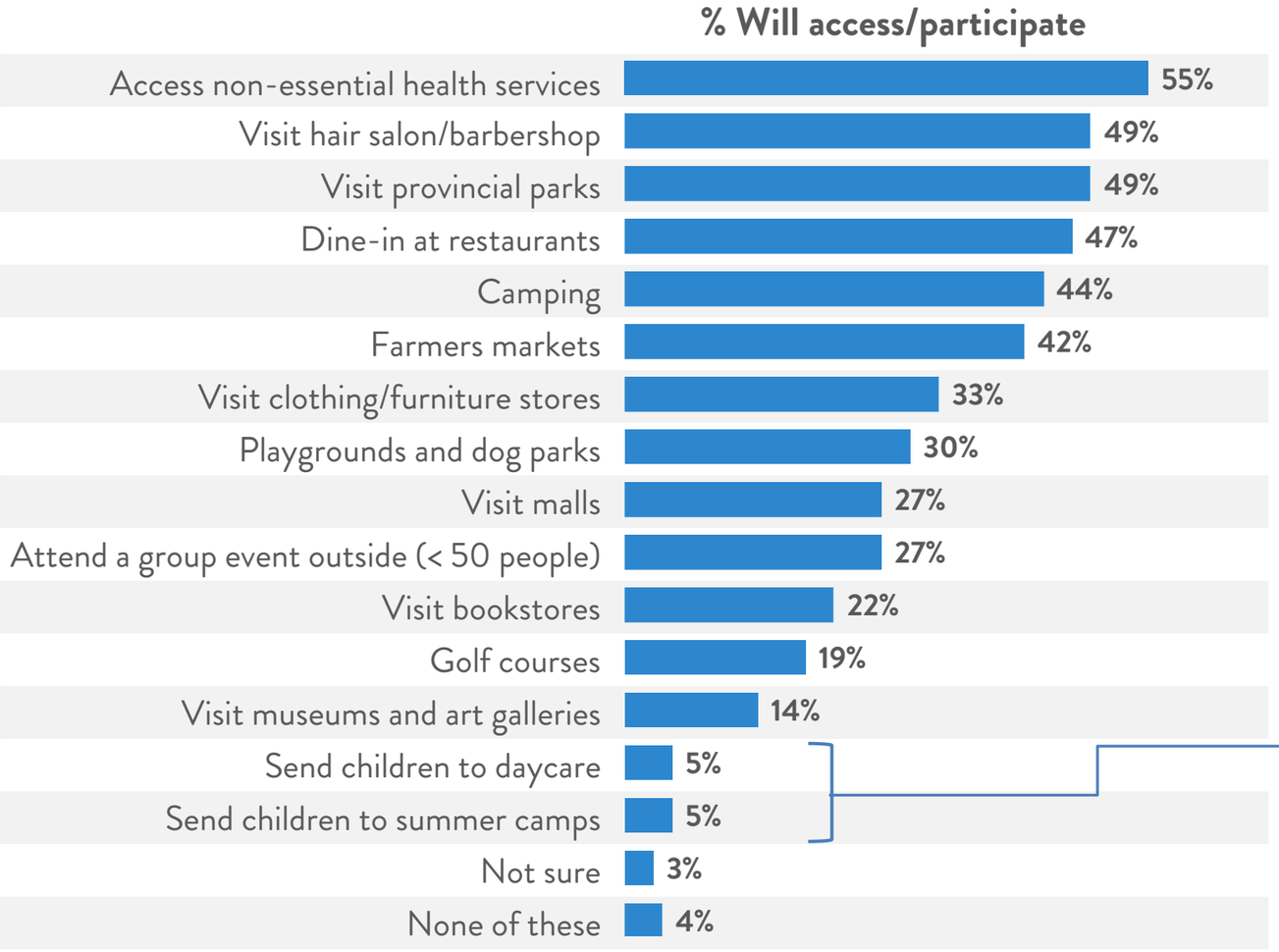
	% Selected	Calgary *n=499*	Edmonton *n=497*	North *n=101*	Central *n=131*	South *n=120*
A vaccine or cure for the virus	30%	33%	35%	26%	19% ↓	25%
Seeing reliable statistics in our province	30%	30%	31%	30%	34%	28%
Having visible proof of how operations are changing	14%	14%	15%	10%	16%	15%
Paying attention to my own emotions and feelings	8%	9%	5%	12%	6%	9%
None of these/just time passed	18%	14%	13%	22%	25%	23%

Stone – Olafson

Q19. Which is MOST important to you personally, in order to increase your comfort level with resuming your regular activities?
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

What comes first? Health services, hair cuts, provincial parks and restaurants.

Larger group events and museums are less of a priority, as are childcare arrangements – although these are much more audience dependent. Comfort levels also impact intended visitation – those with a higher personal comfort are more likely to access all services.

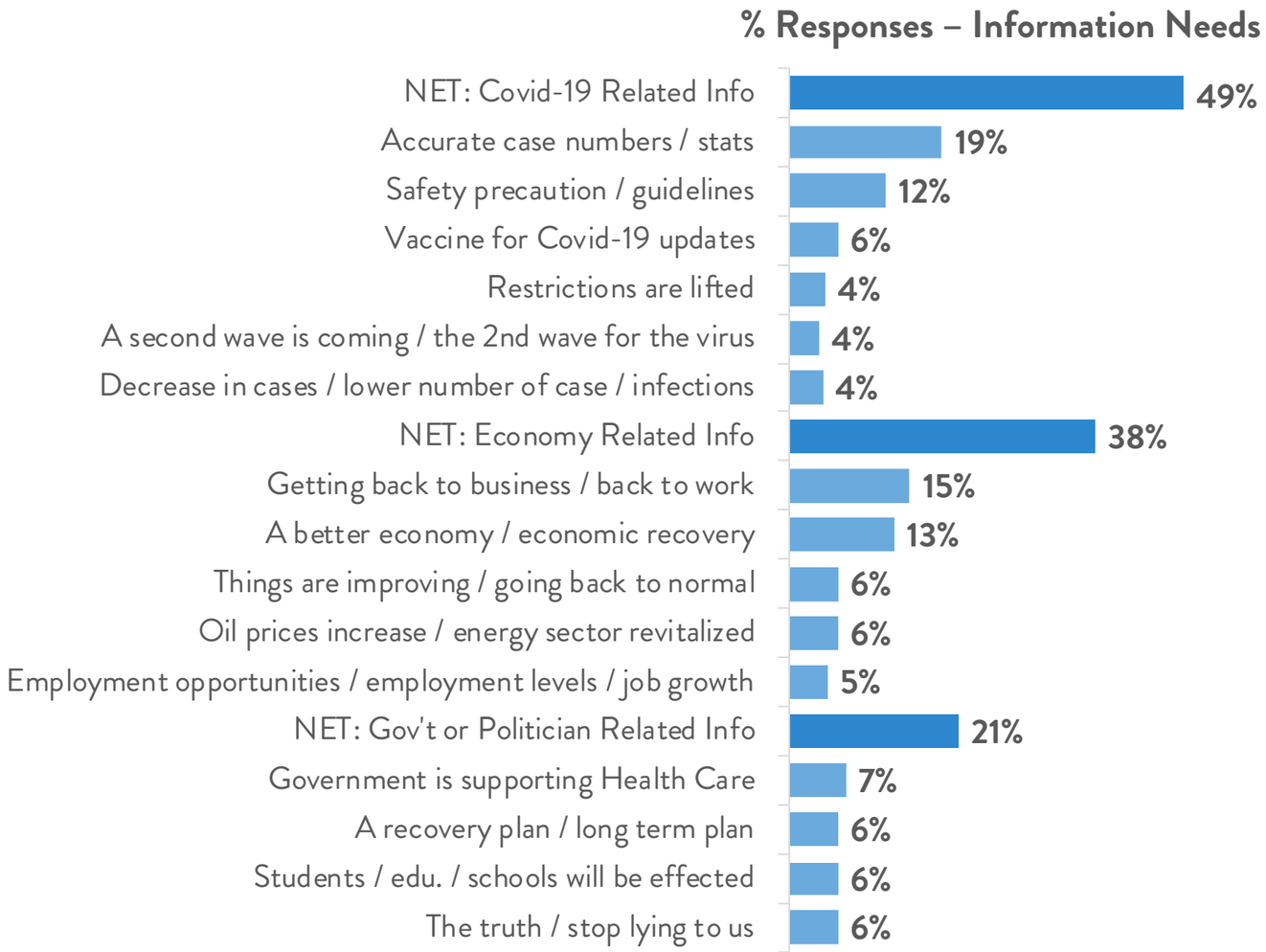


Only 19% of **those with kids** will access childcare immediately.

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: Main sample (n=1040).

Stone – Olafson

Information needs: COVID-19 specific information remains the top priority but 38% of Albertans are looking for economic communication



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: Provided response (n=838)

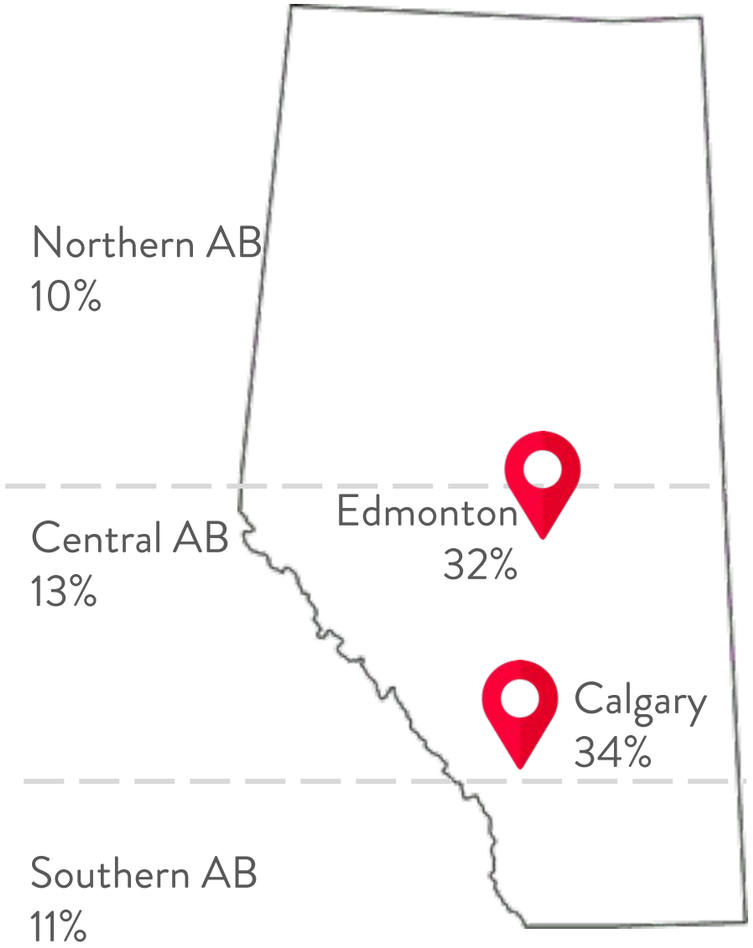
Stone – Olafson

Respondent Profile

Stone — Olafson

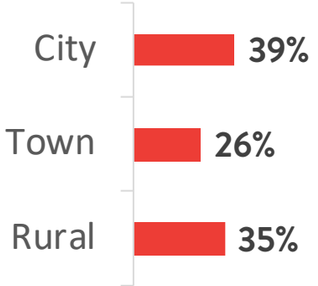
Who we heard from

Region

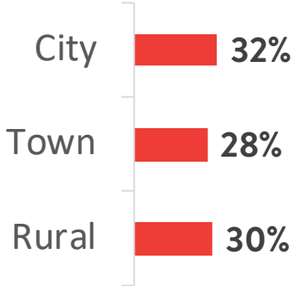


Community Type

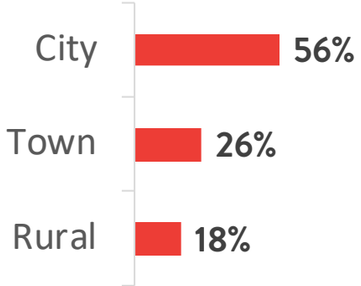
Northern AB



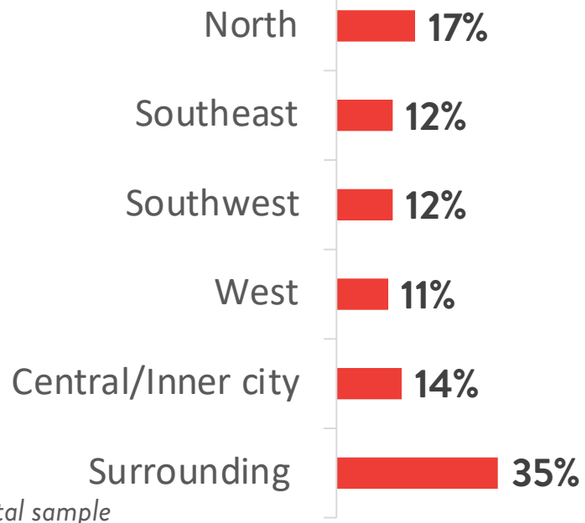
Central AB



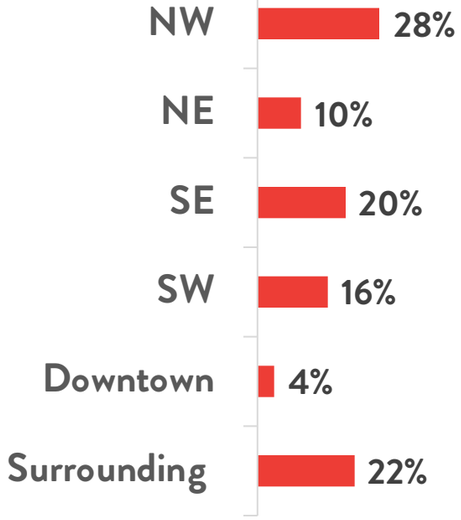
Southern AB



Edmonton



Calgary

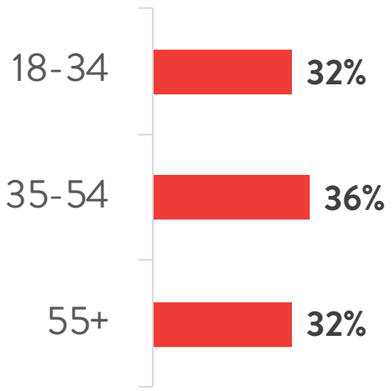


Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

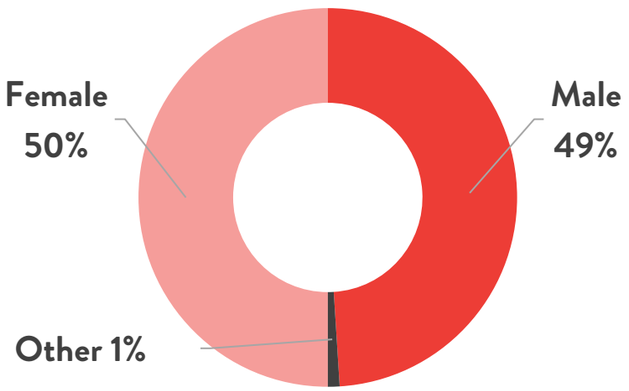
Stone — Olafson

Who we heard from

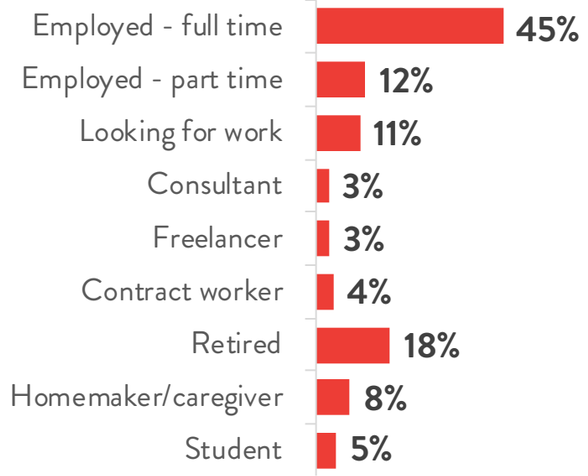
Age



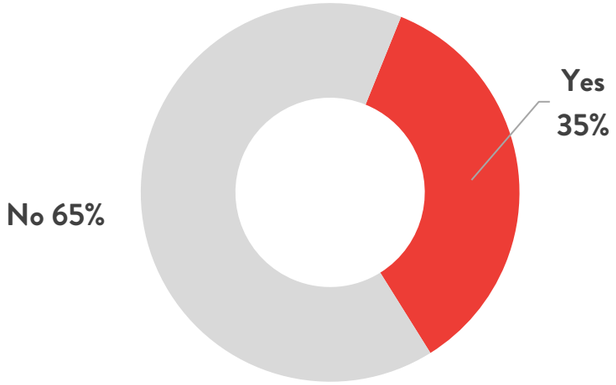
Gender

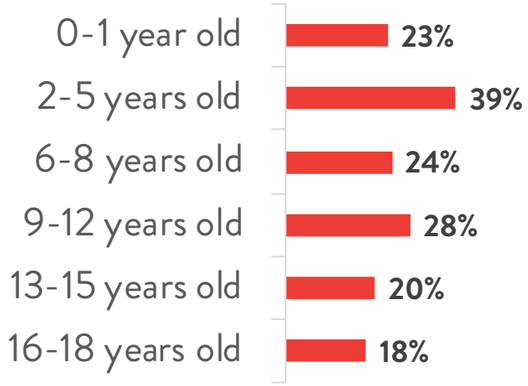


Employment

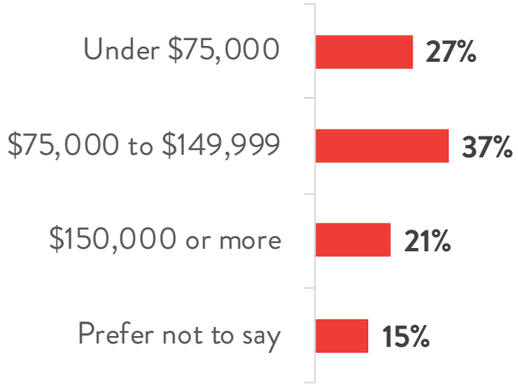


Children in the Household





Household Income



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Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

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Olafson

Understanding people. It’s what we do.