

An aerial photograph of Calgary, Alberta, Canada, showing the city skyline with various high-rise buildings and a river in the foreground. The image is used as a background for the presentation slide.

Stone —
Olafson

The NEW Experience Economy:

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

Wave 2 Results: Calgary
August 2020

Table of contents

3	Overview of Research
4	How to use this report
5	How is Calgary Different?
6	How Have Comfort Levels Shifted in Calgary?
9	Summer Activities and Substitutions
15	Understanding How External Influences Shape Perceptions
19	How has Spending Shifted?
23	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 same respondents surveyed each wave), 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 2:

- Online survey, Albertans 18+
- Respondents were recruited through Angus Reid Forum.
- Field dates: July 8 to July 23, 2020
- Quotas set regionally, final data was weighted within Calgary by age and gender.
- A total of 1,346 surveys collected with Albertans. Within that sample, 499 Calgary-only surveys were collected:
 - 352 base surveys (within main sample)
 - 147 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:

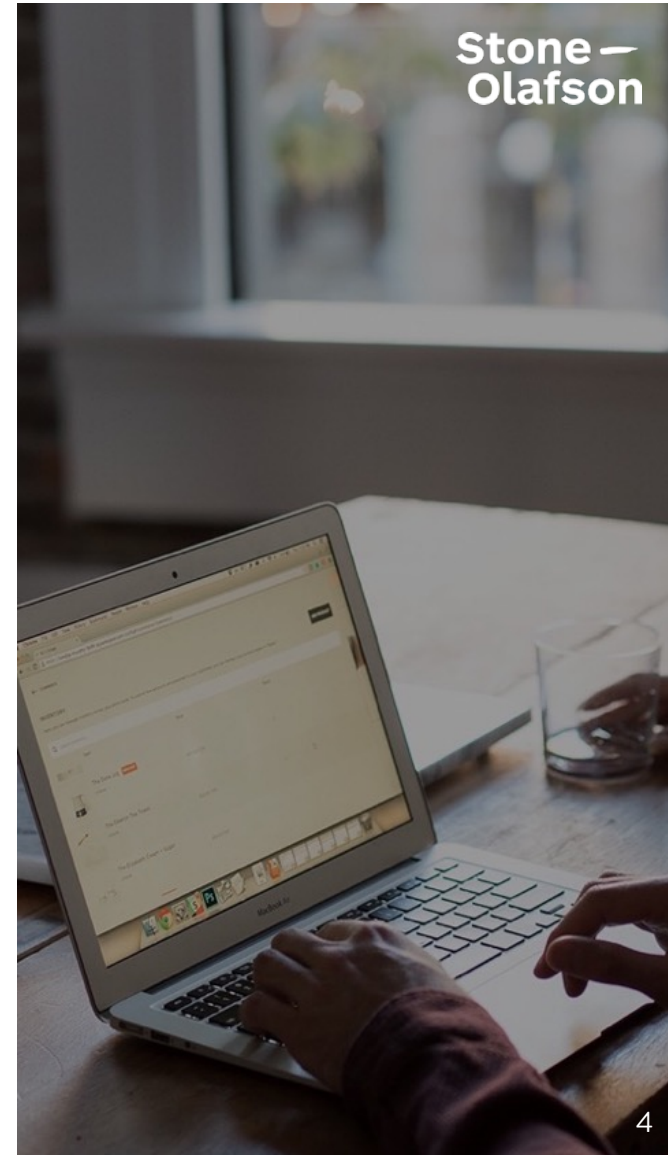
www.stone-olafson.com/insights

Please note:

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 +/- 4.4%, 19 times out of 20.



What is different in Calgary?

1.

Comfort levels unchanged but greater acceptance of mask wearing

Calgarians are reacting very similar to re-opening efforts as the rest of the province: they are growing more comfortable with the pace but still wary with larger groups. But more than any region, acceptance of mask wearing has grown. This may be a function of a younger demographic or the lingering impact of earlier outbreaks (now overcome).

2.

Outdoor pursuits and “Stay-cations” have higher consideration in YYC

More Calgarians are considering activities like staycations or hiking than other Albertans. Great opportunity to continue to capitalize on these during warmer months and consider how to continue leveraging once seasons shift and outdoor activities become more challenging.

3.

Calgarians are becoming more jittery about economy

Calgary still has the highest overall caseload to-date but weathered early outbreaks. Driven by 35-54-year olds (primary working ages, more likely males), there is a growing sense of economic concern in the city and greater eagerness to get back to work that is not as strong as in other regions.

How have comfort levels shifted in Calgary?



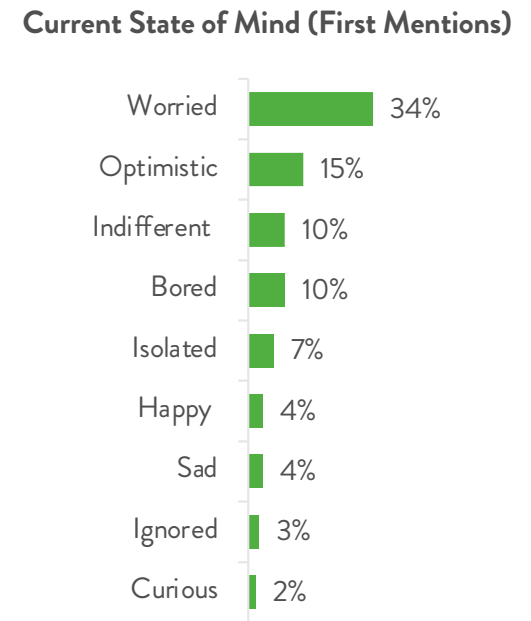
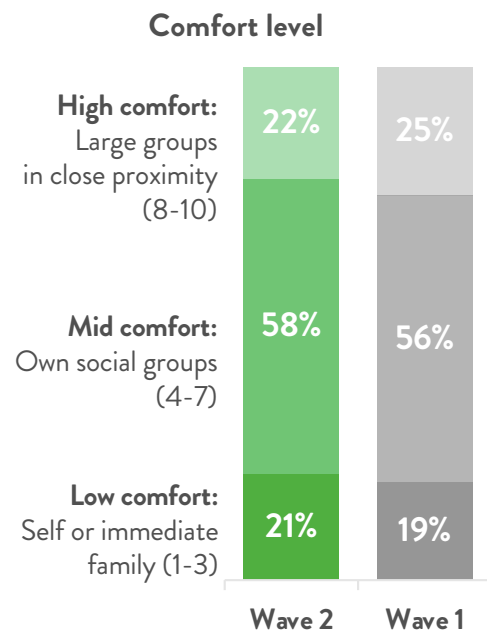
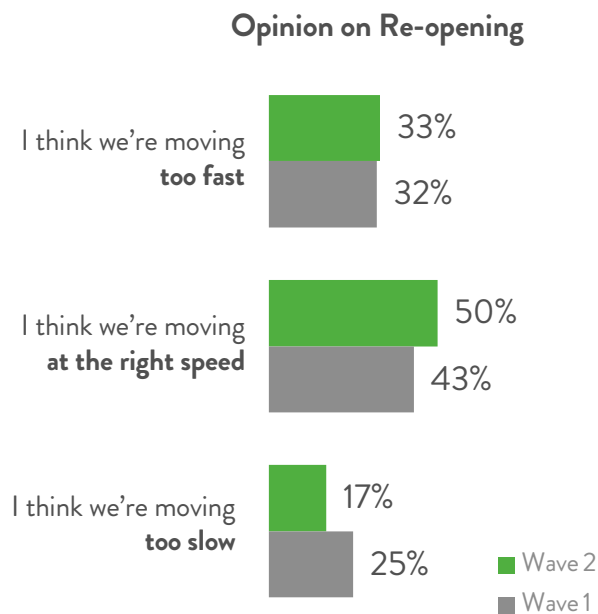
Hand
Sanitizer

+ VITAMIN E

- Leaves hands soft
- Contains moisturizers
- Kills more than 99.99% of germs*

28 FL OZ (828 mL)

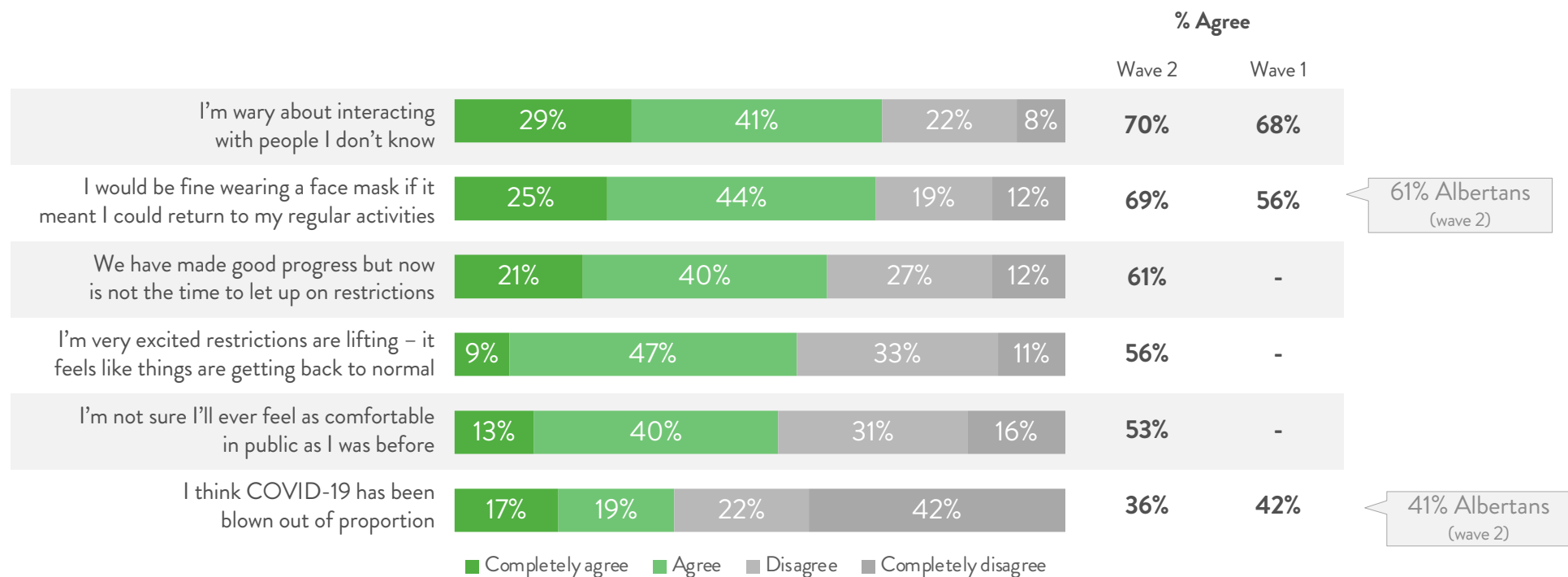
Calgarians continue to mirror the rest of the province with respect to re-opening outlook, comfort level interacting with others, and emotions



Which statement best reflects your personal opinion on the current state of re-opening in Alberta? 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? Given everything that is happening in Alberta, which of the following best describes how you are feeling today? And how else are you feeling?

Base: Calgary sample (n=499)

Demonstrating the balance between returning to normalcy and risks of COVID-19, there is still wariness but comfort with masks is growing

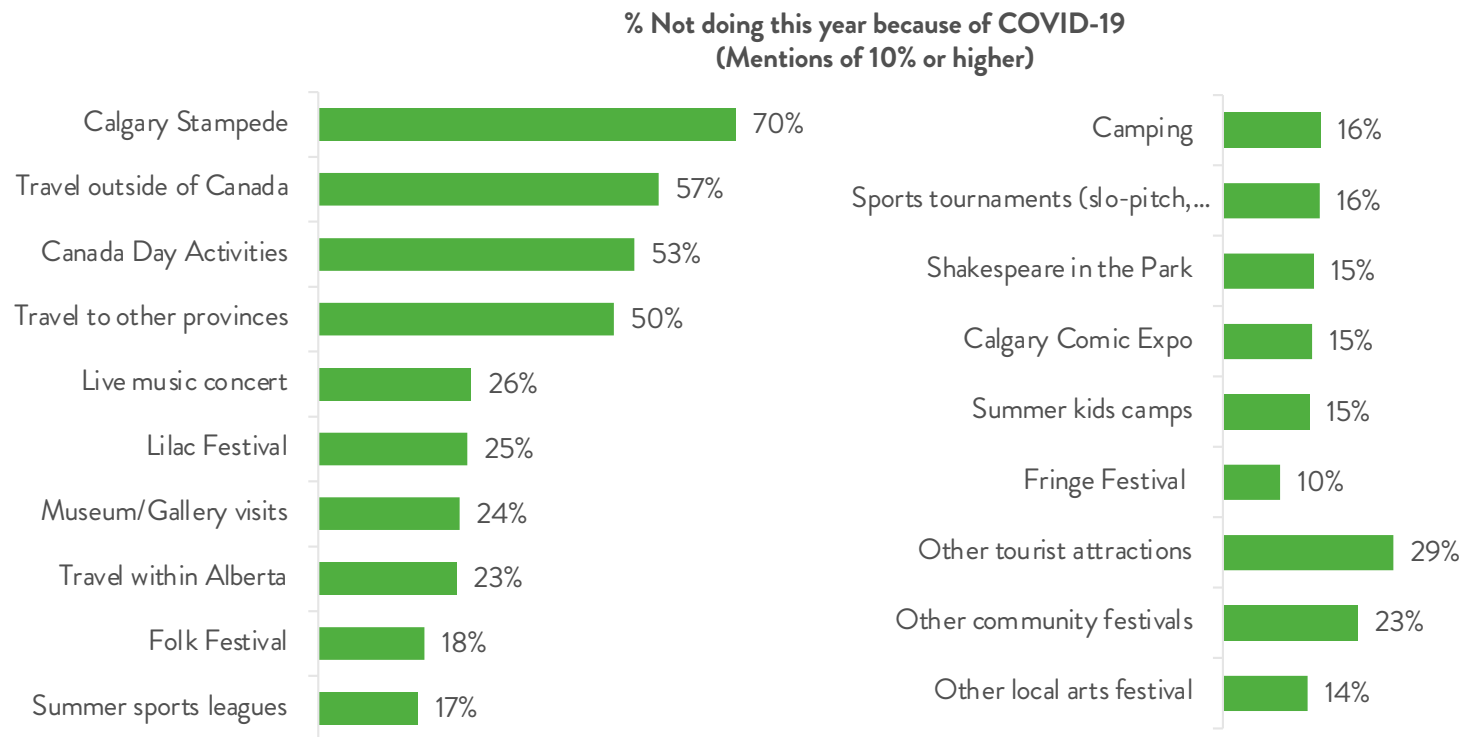


Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.
 Base: Calgary sample (n=499)

Summer Activities and Substitutions



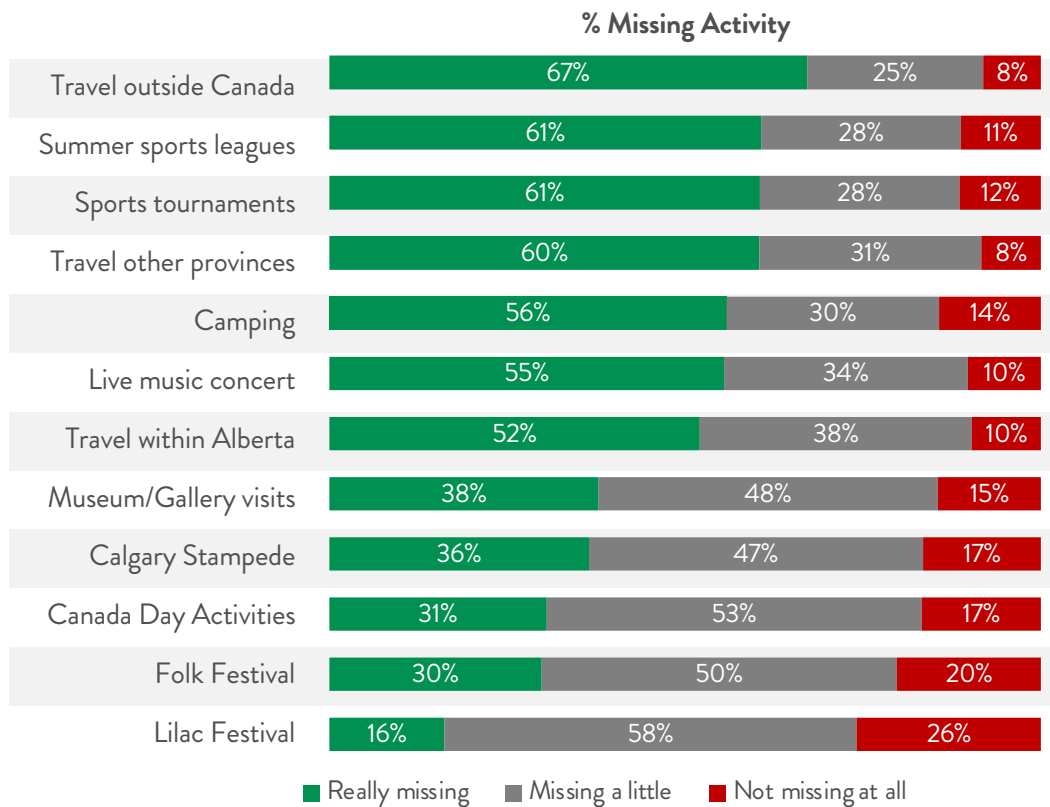
There is an expansive range of activities that Calgarians gave up this summer due to COVID-19



Summer is a busy time in Alberta and traditionally a season with lots of different activities. Thinking about your typical summer activities, which of the following are you or your family not doing this year because of COVID-19 (but used to do)?

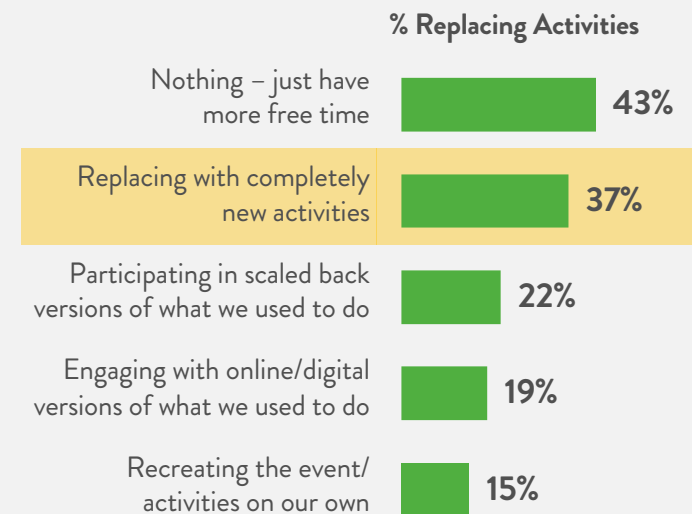
Base: Calgary sample (n=499)

Which activities are missed the most?



And when you think about all the things you typically do, to what degree are you missing these activities
Base: Calgarians who typically participated in each activity (n=varies)

Similar to the province, the number of Calgarians who are replacing activities is high and there is a risk of losing audiences over the long term (what will be needed to earn them back?).

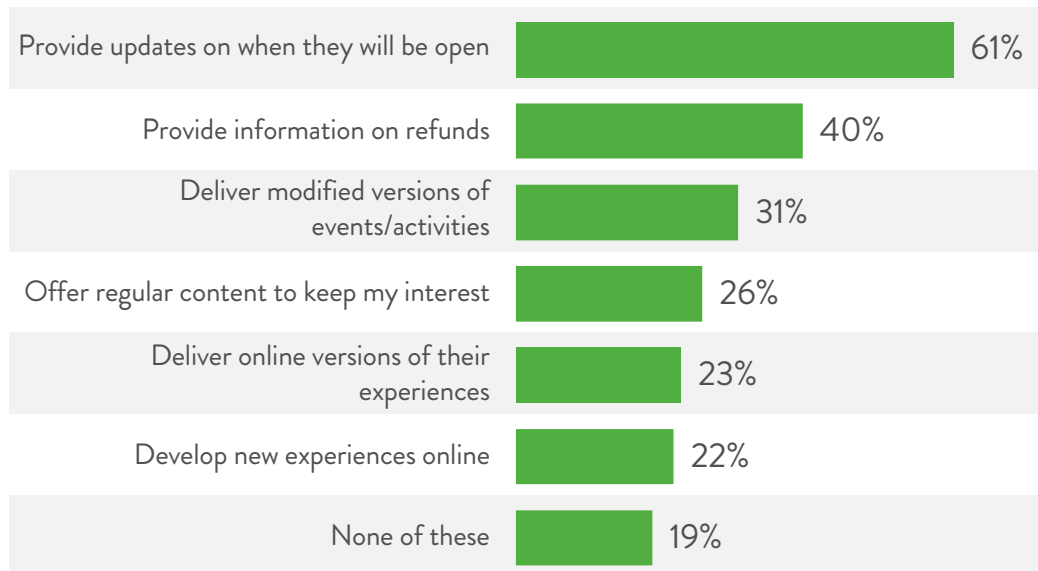


To what extent are you replacing the activities you really used to miss?
Base: Calgarians who are 'really missing' at least one activity (n=372)

Providing information and being transparent is most important for experience organizations

Communication remains critical. First and foremost, Calgarians want to simply hear from organizations on the steps they are taking to re-open (even if decisions have not been finalized or there is no real “information” available). When Calgarians feel informed, they will be more likely to make decisions on participation, even in modified forms.

What experience organizations could be doing:



There are lots of things organizations that offer experiences could be doing. What do you want them to be doing to keep you connected?
Base: Calgary sample (n=499)

What are Calgarians considering this summer?

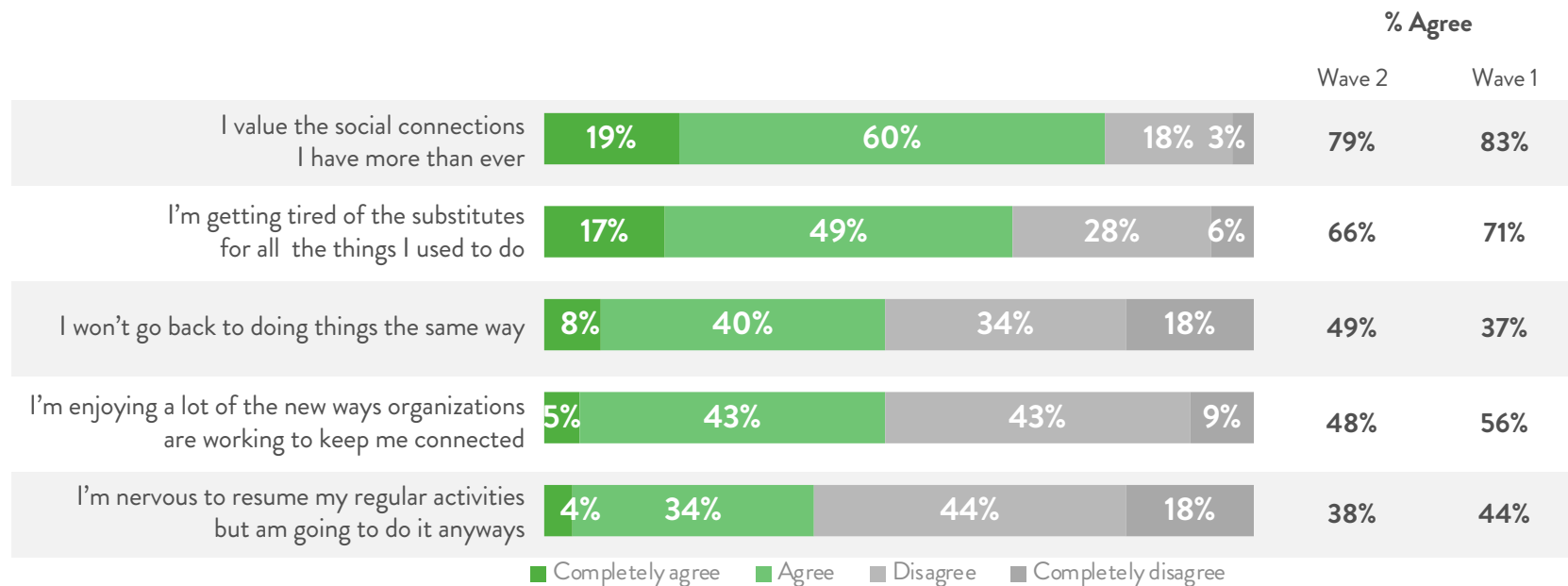
Relative to the rest of the province, Calgarians are more likely to consider some recreational/fitness pursuits like hiking (proximity to mountains likely influences) and returning to fitness centres.



Now that some restrictions are lifting, what are some of the things your household is considering in the next few months of summer? Please select all that apply.
Base: Calgary sample (n=499)

Realization is setting in for Calgarians, much like the rest of Alberta, that COVID-19 is having a lasting impact

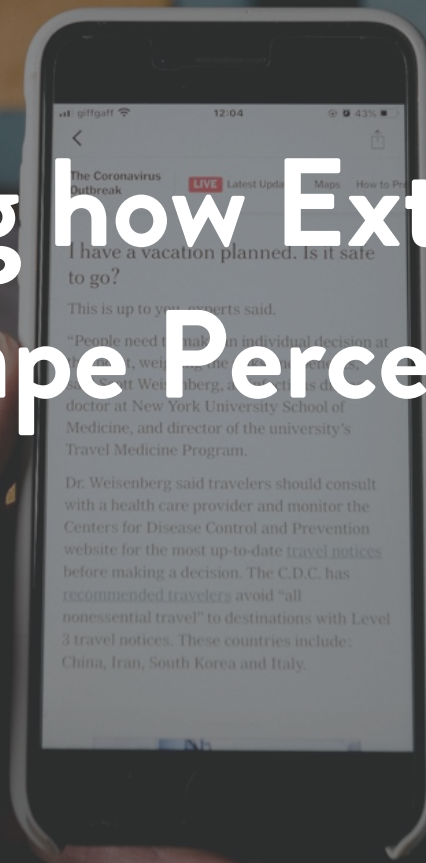
The shift in perceptions on re-connecting from wave 1 to wave 2 reflects our phased re-opening and the available of more activities than in wave 1. Calgarians are slightly less fatigued with what's being offered (because there is more available) but also conflicted with how exactly to re-engage in the most comfortable (and enjoyable) form.



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.

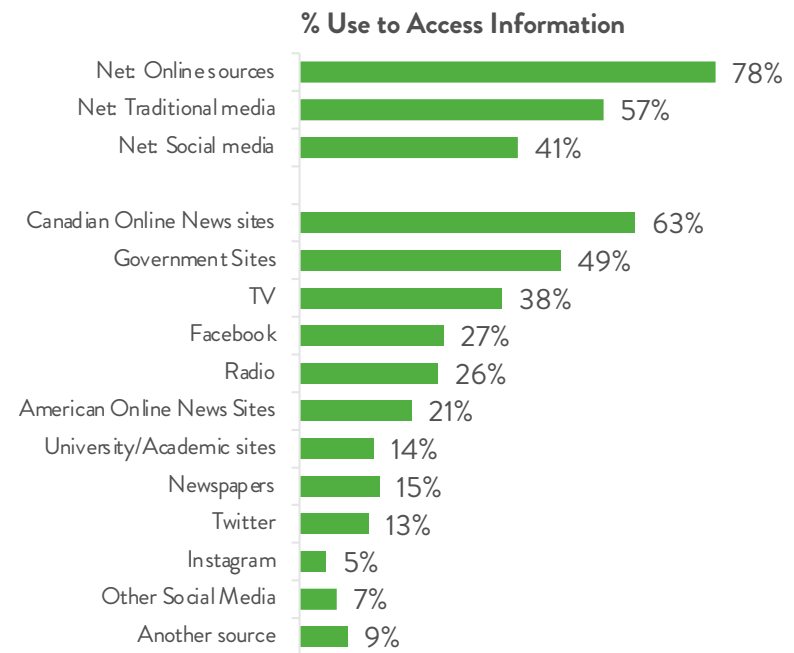
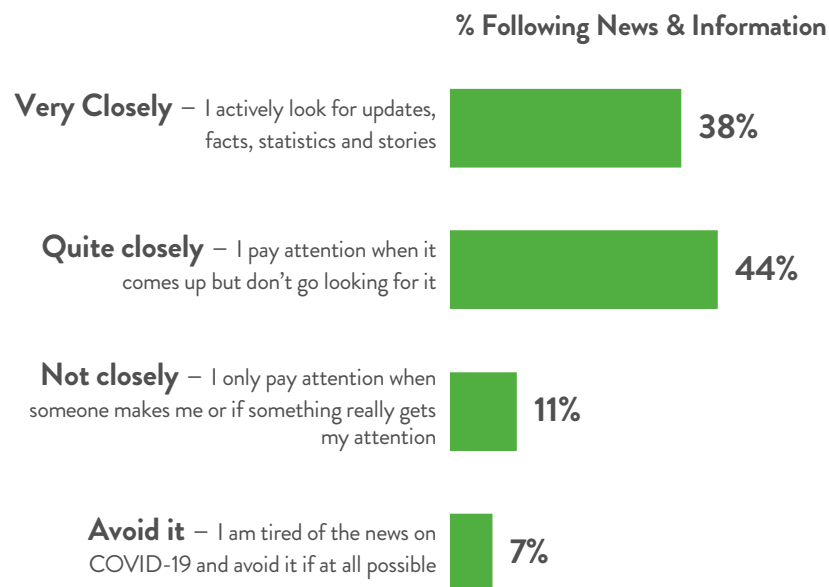
Base: Calgary sample (n=499)

Understanding how External Influences Shape Perceptions



Calgarians are following COVID-19 news and information closely, mostly through Canadian news online, government sites, or the news

Like the rest of Alberta, those who follow the news most closely, are more likely to get their information from online sources over traditional.



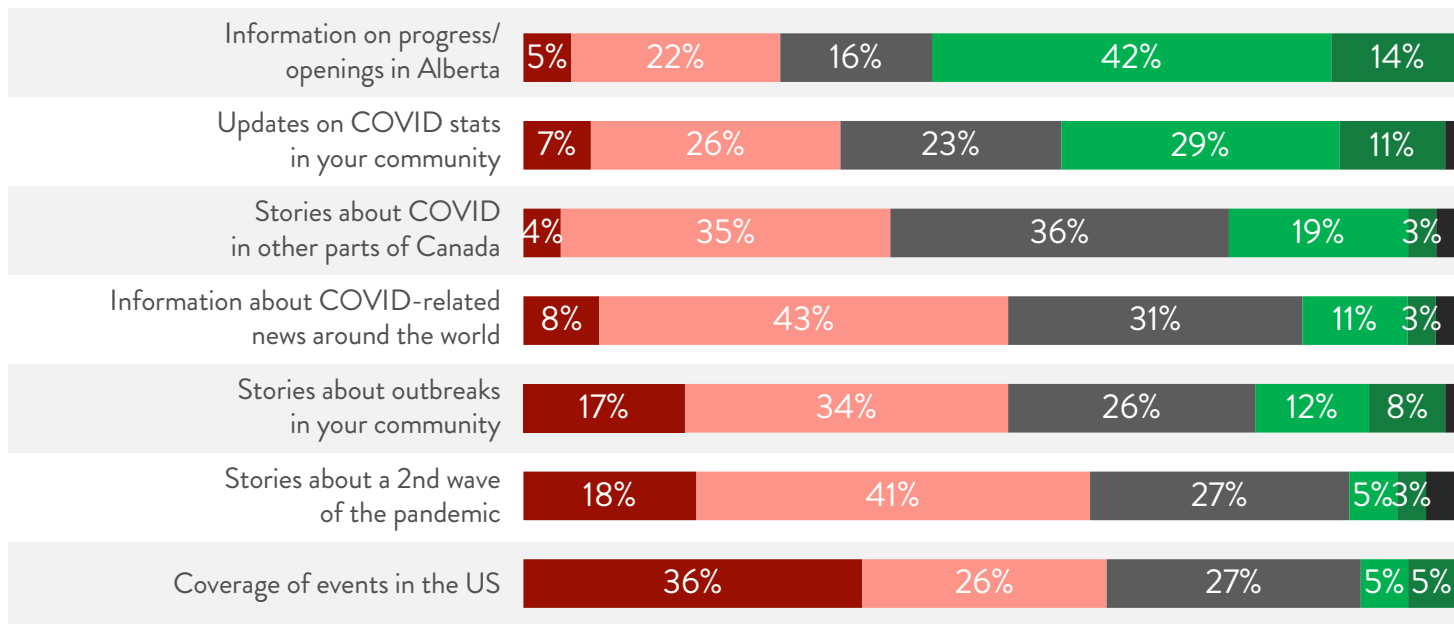
Generally speaking, how closely are you following any news and information about the COVID-19 Pandemic?

Base: Calgary sample (n=499)

Overall COVID-19 news has a net negative impact on re-engagement with the experience economy

But as with the rest of the province, there are portions of Calgarians who feel no impact from the news cycle. These respondents tend to be male, between the ages of 34-54 and haven't experienced a shift in income as a result of COVID.

% Net Impact

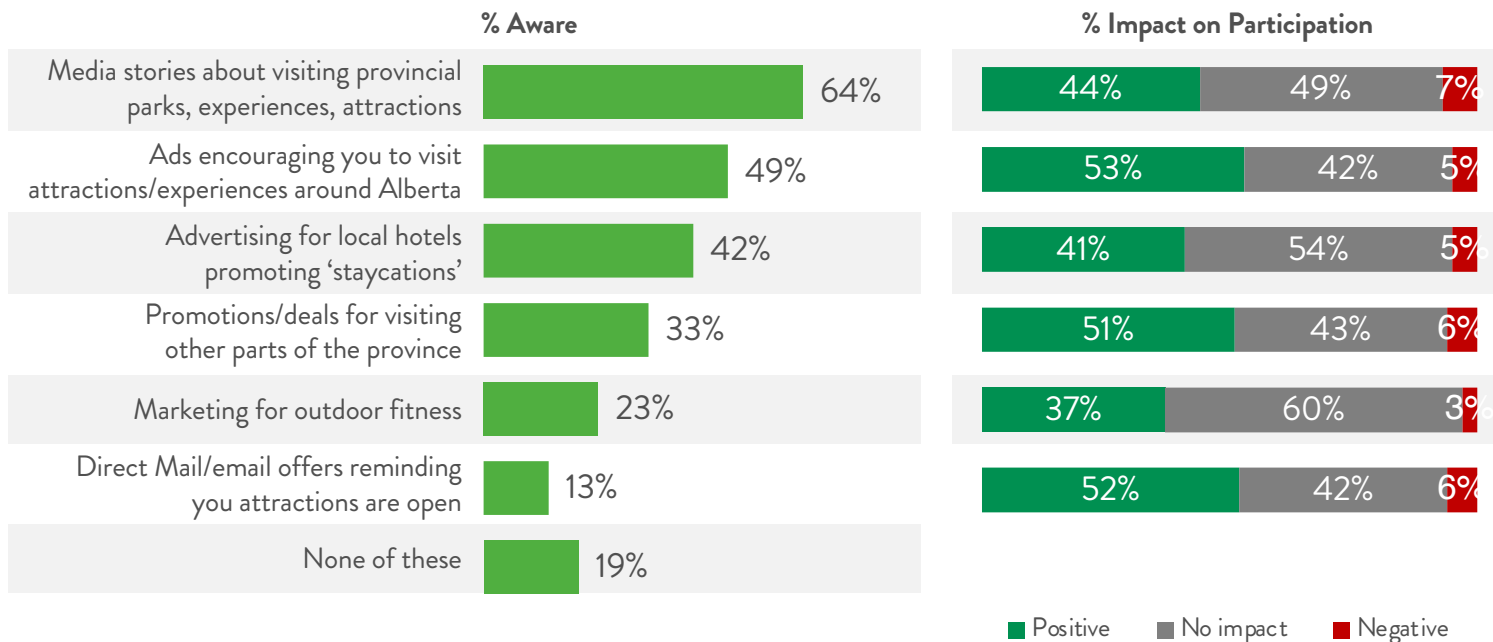


■ Very negative impact ■ Somewhat negative ■ No impact ■ Somewhat positive ■ Very positive impact ■ Unsure

What impact, if any, do the following stories have on how you feel about re-engaging with activities you used to do?
Base: Calgary Sample (n=499)

What about marketing? Because Calgarians are paying attention to news, they are also noticing information about activities (81%)

And the impact is positive (or at worst, neutral). This shows a receptivity to marketing. Although direct communication and promotions/deals have slightly lower awareness (may reflect weight in market), these have the most positive impact on intent to participate.



Over the last few weeks there have been efforts to attract attention to various activities and experiences. Before today, which of the following were you aware of? (These could be online, in print, radio or TV). Please select all that apply. *Base: Calgary sample n=499*

Thinking about the marketing/promotions you were aware of, what impact did these have on your intentions to participate in those activities?

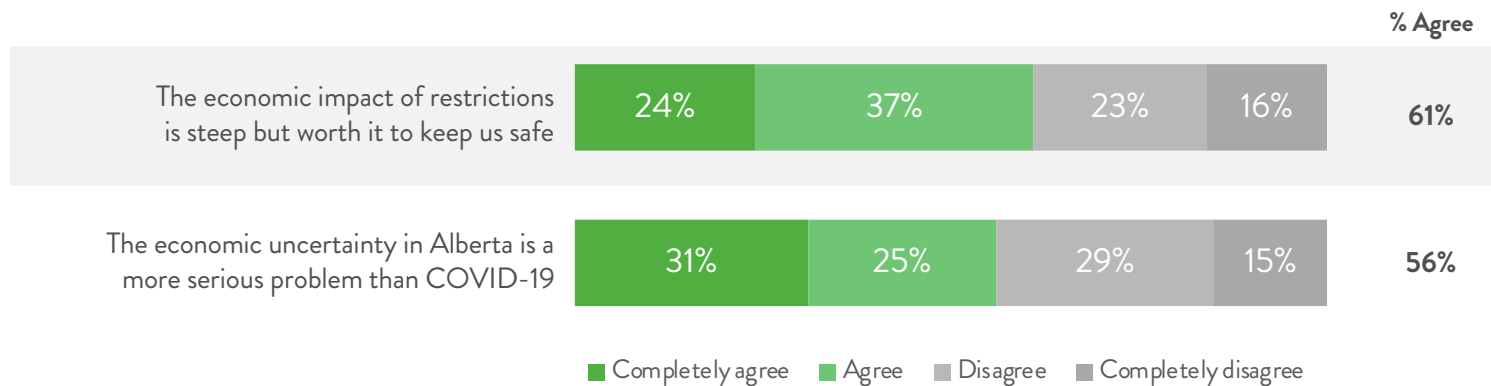
Base: Aware of each type of marketing/promotion (n=varies)

How has Spending Shifted?



Calgarians are generally aligned with the province on perceptions of economic impact of COVID-19 and the severity of concerns

The North region is driving more serious concerns about the economy (and to a lesser extent, south and central) but there is still a clear dichotomy on the issue across the province, including Calgary – a tug and pull between restrictions and the cost of them/overall economic uncertainty.

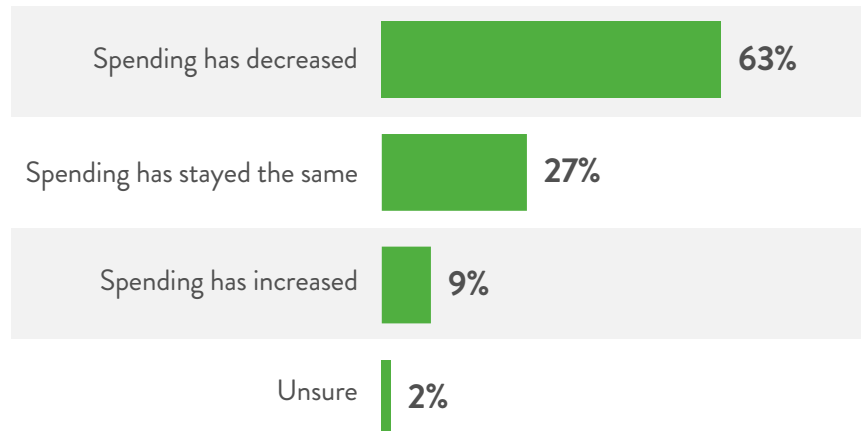


Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.
Base: Calgary sample (n=499)

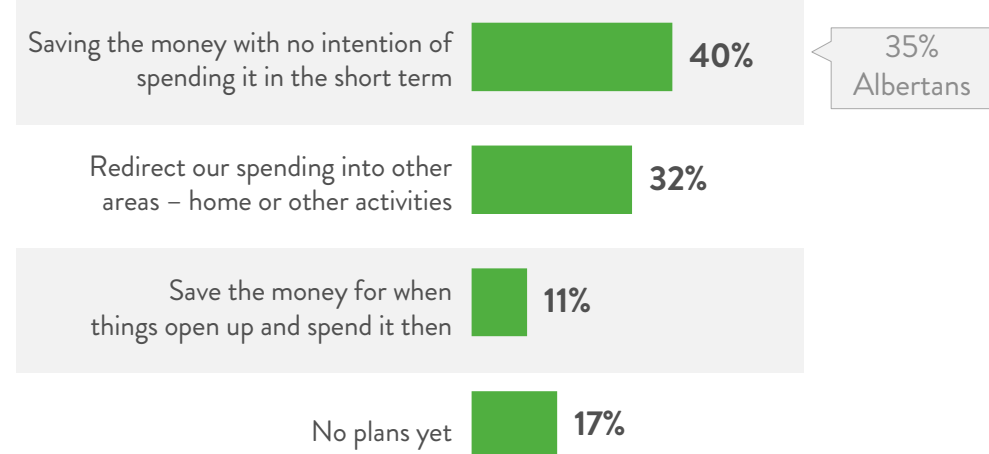
Discretionary spending has decreased at a greater rate for Calgarians and more have no intention of spending in the short term

Calgarians have experienced income reductions at a similar rate as the rest of the province but do seem more anxious about the economy/returning to work (14% of Calgary males say this is the thing they miss most, compared to 9% of males across Alberta as a whole). This is likely being reflected in a sharper spend decrease.

Spending on non-essential items



Reaction to spending less

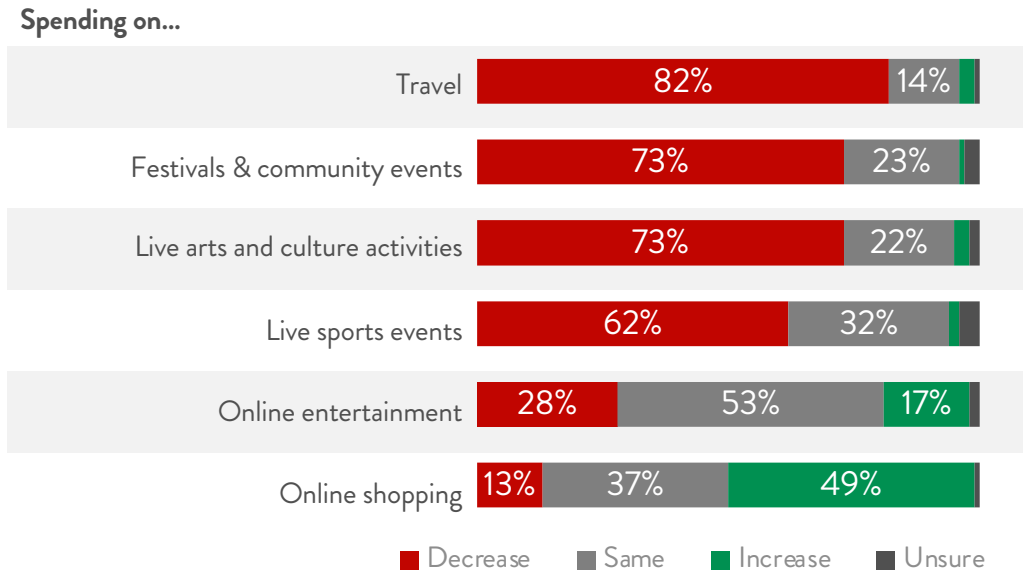


Thinking about your overall spending on non-essential items, would you say your overall discretionary spending has decreased, stayed the same or increase?
Which of the following best describes how your household is most likely to react to spending less during the pandemic?

Base: Calgary sample (n=499)

Overall, spending trends mirror the province with large reductions on major sectors but an increase in online options

While organizations will not be able to simply offer an online replacement for activities (as noted in Wave 1), there will be opportunities to monetize online or hybrid offerings as Calgarians (and the rest of Alberta) have started to spend more in this area.



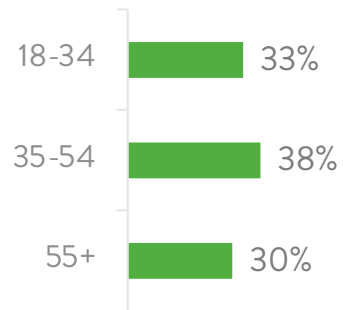
Now thinking more specifically, how has your spending on the following changed?
Which of the following best describes how your household is most likely to react to spending less during the pandemic?
Base: Calgary sample (n=499)

A blurred photograph of a large crowd of people walking on a city sidewalk. The image is taken from a slightly elevated angle, showing a wide path paved with light-colored bricks. The people are in motion, creating horizontal streaks that suggest a busy, fast-paced environment. They are wearing various casual clothing like t-shirts, jeans, and trousers. In the background, there's a green lawn area and a road with some vehicles. The overall tone is dynamic and represents a diverse group of individuals.

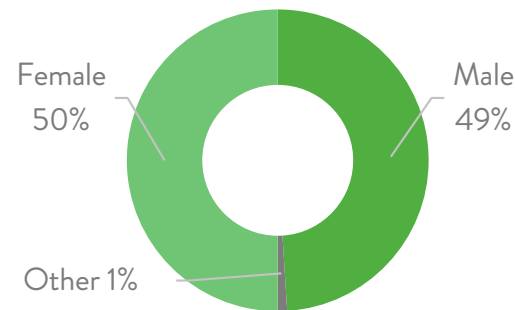
Respondent Profile

Who We Heard From (Calgary)

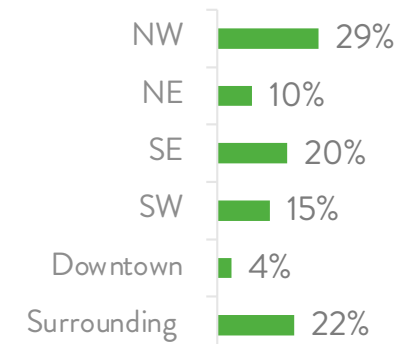
Age



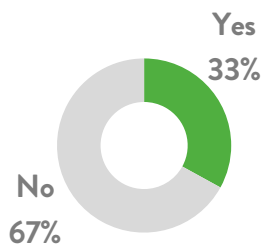
Gender



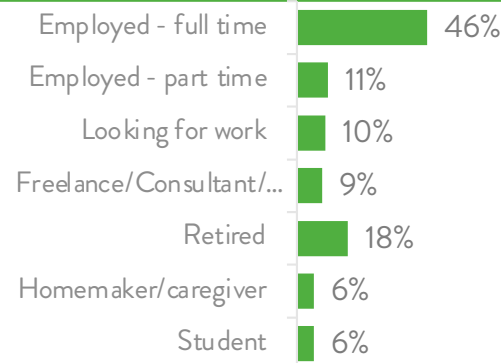
Location



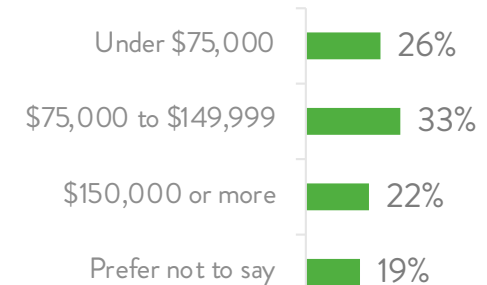
Children in the Household



Employment

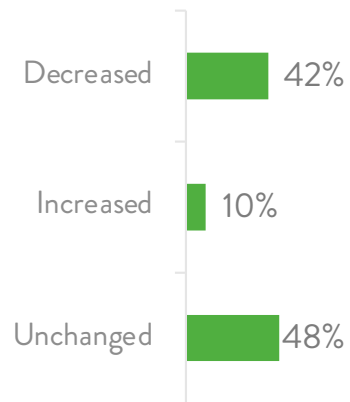


Household Income

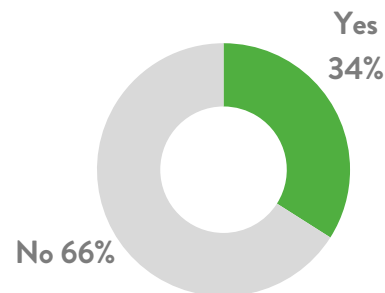


Who We Heard From (Calgary)

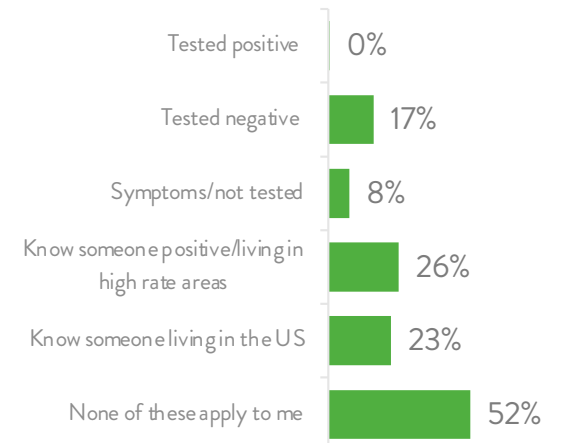
Income Changes (COVID)



Accessing Government Benefits



Connection to COVID



**Stone —
Olafson**

Understanding people. It's what we do.