

A photograph of the Edmonton skyline across a river, with a bridge in the foreground. The city is built on a hillside, and the river reflects the buildings and the bridge. The sky is overcast.

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# The NEW Experience Economy:

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

Wave 2 Results: Edmonton  
August 2020

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# 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 Edmonton by age and gender.
- A total of 1,346 surveys collected with Albertans. Within that sample, 498 Edmonton-only surveys were collected:
  - 335 base surveys (within main sample)
  - 163 booster surveys

## How to use this report:

**This report will focus on outcomes from Edmonton respondents only.** The purpose of this report is to provide a supplementary perspective of the Edmonton 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:

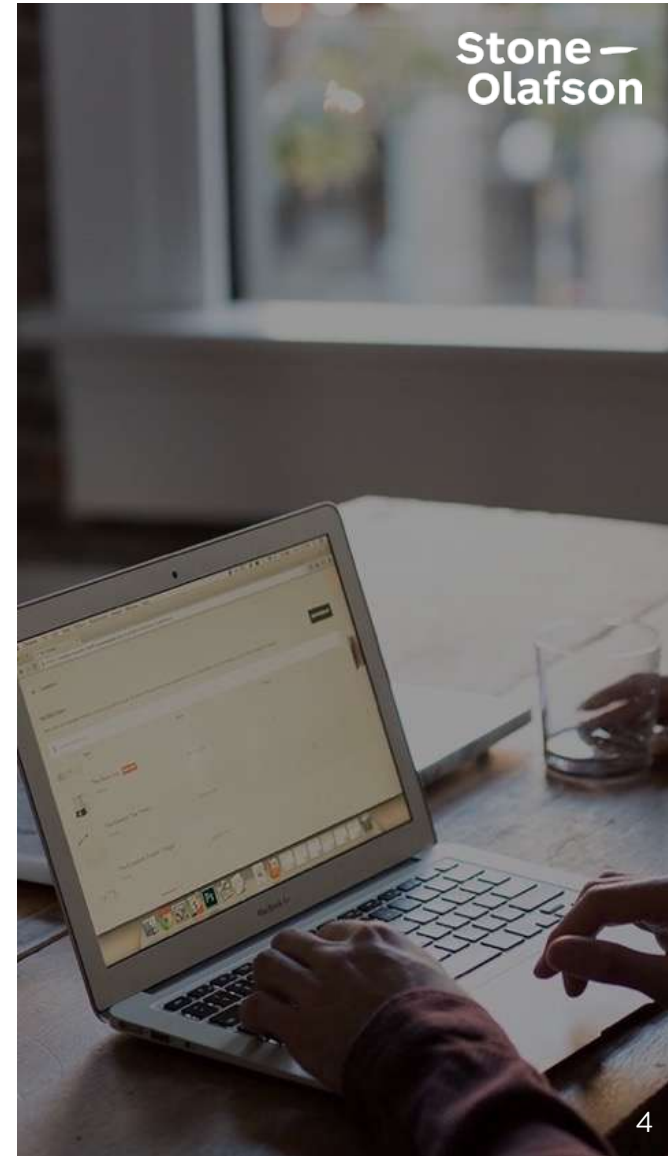
[www.stone-olafson.com/insights](http://www.stone-olafson.com/insights)

*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 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 Edmonton?

1.

### **Comfort level is lowest in the province.**

Edmonton stands out from the rest of Alberta when it comes to comfort. More than any region, wariness around unfamiliar people has grown to 77%. This is likely a reflection of the current situation of the pandemic in Edmonton – recent outbreaks, high hospitalization rates, and inviting people in as an NHL hub city. Infection rates continue to be a vital factor towards comfort to re-engage.

2.

### **Less fatigue towards substitutions**

Like the rest of the province, Edmontonians are eager for updates, information or promotions. However, this may look different in Edmonton based on lower comfort levels. They have a greater enjoyment around the new way organizations are keeping connected and show less fatigue toward substitute activities. A greater opportunity to offer hybrid experiences – digital and showcase the safety around in-person experiences.

3.

### **Greater concern for restrictions over the economy**

With Edmonton being at the top for number of active cases in Alberta, the focus on safety comes to the forefront for many residents in the Capital city. Driven by females and younger Edmontonians, the importance of pandemic restrictions outweigh the economic impact, and they think COVID-19 is a more serious problem. A reminder that organizations need to temper expectations about reconnecting with audiences.

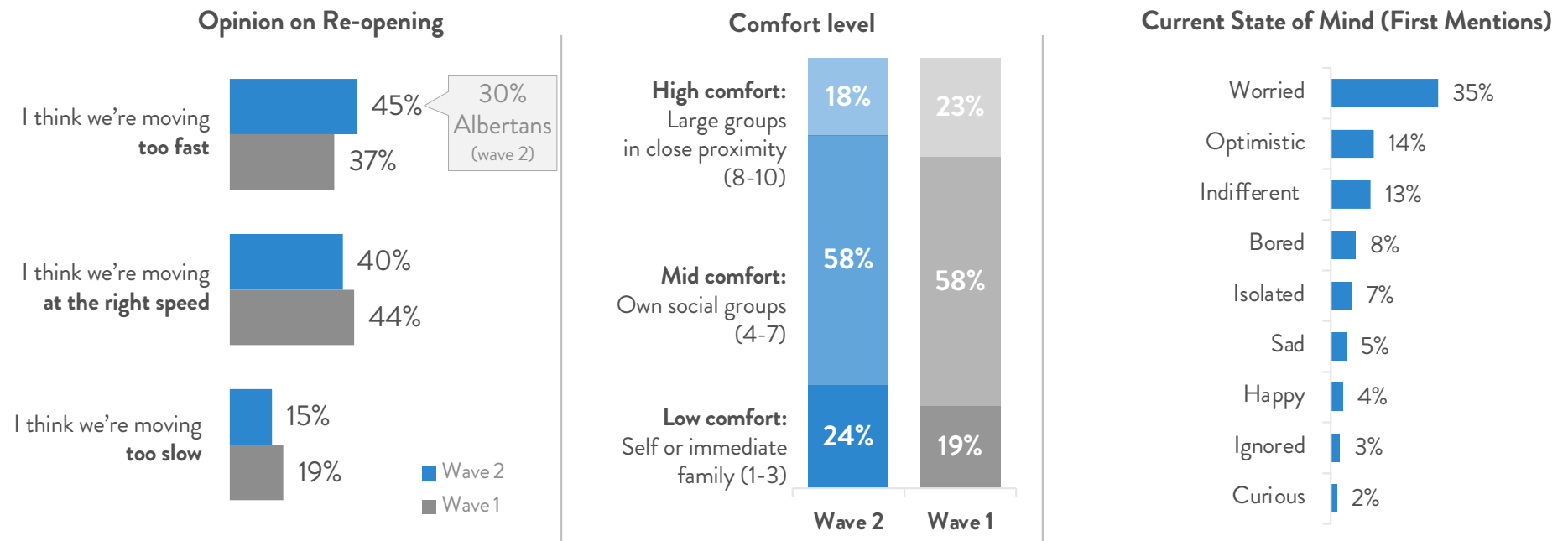


# How have comfort levels shifted in Edmonton?



# Edmontonians display greater skepticism than Albertans overall about re-opening plans for the province with 45% who think it's happening too fast

Comfort levels are also lower than the rest of the province.

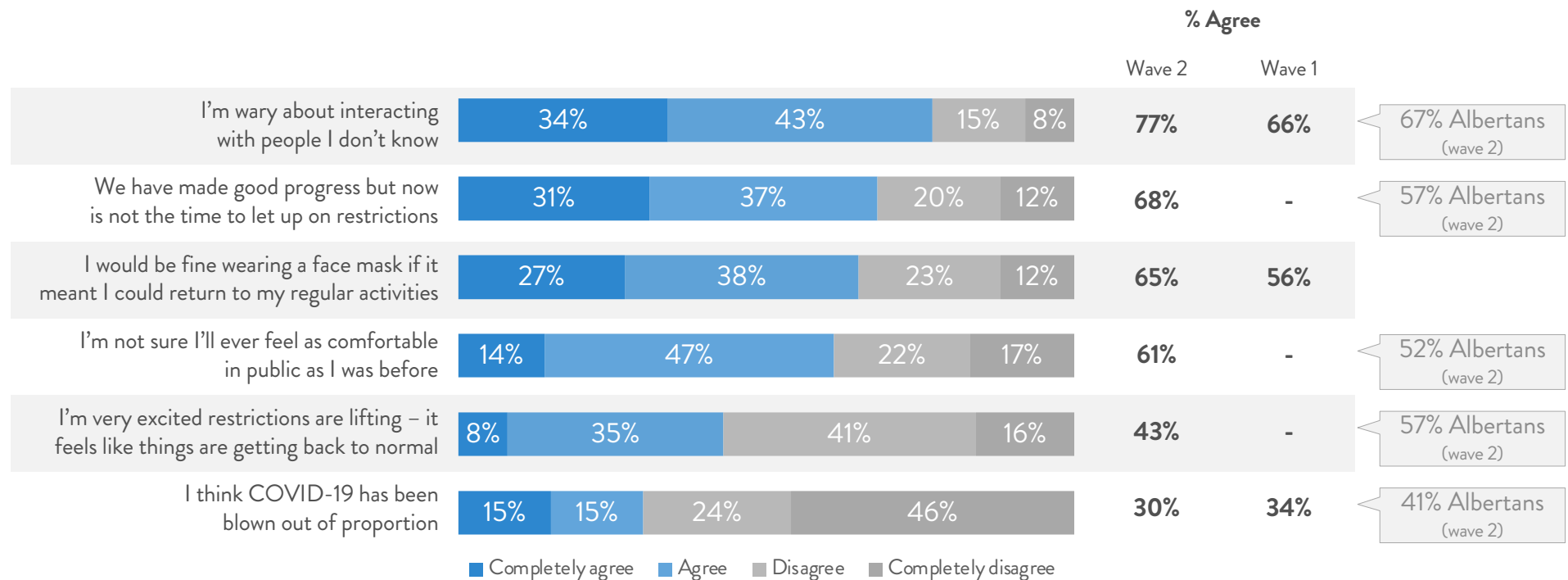


Which statement best reflects your personal opinion on the current state of re-opening in Alberta? As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or 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: Edmonton sample (n=498)

## Lower comfort levels among Edmontonians are exemplified through their perceptions and attitudes towards the pandemic

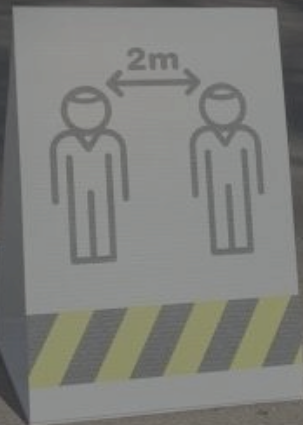
They demonstrate greater wariness around others, hesitation to lift restrictions, and longer-term impacts on comfort and returning to normalcy. However, there is a shift to wearing masks from last wave with the realization of new practices for safety – this is greater among 18-34 year olds (75% agree)



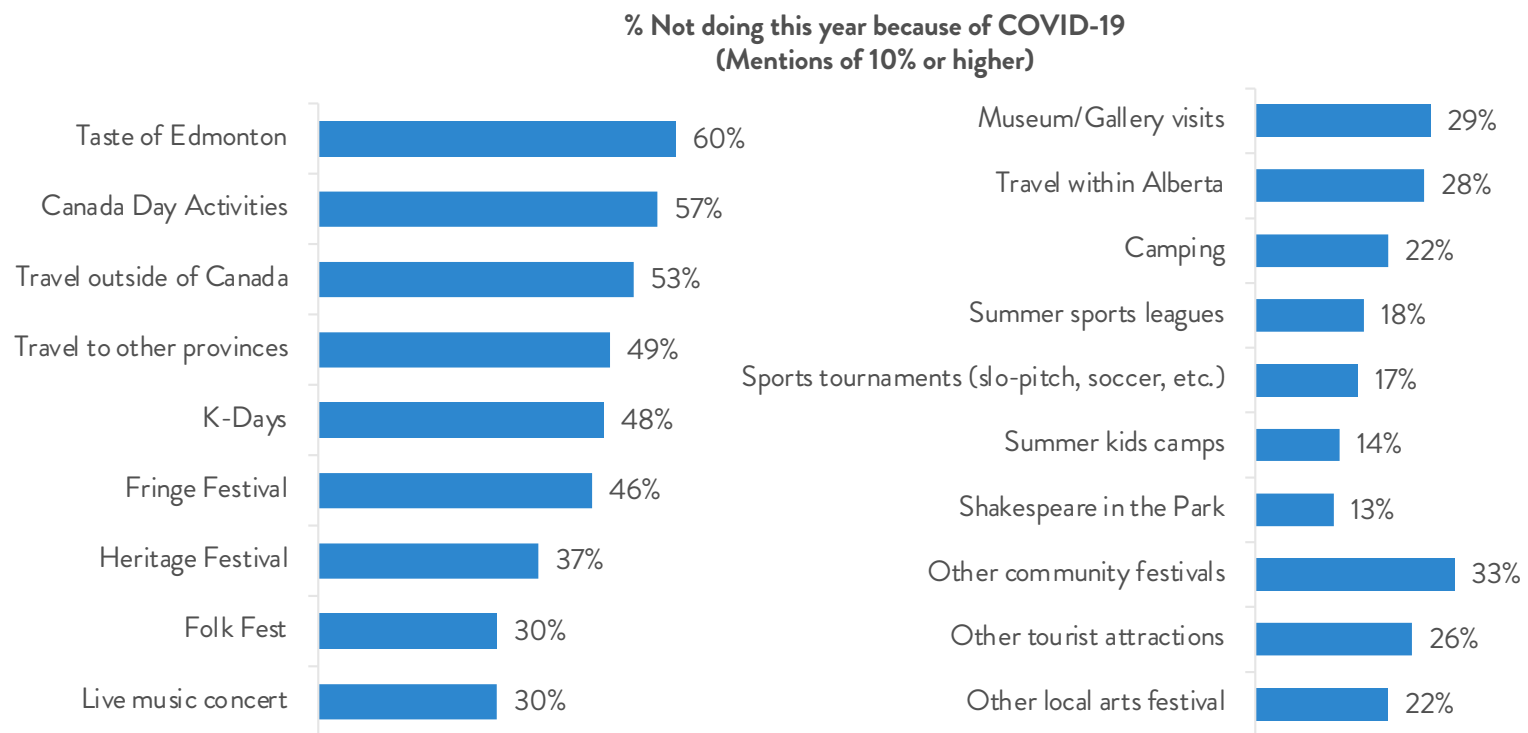
Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.  
Base: Edmonton sample (n=498)



# Summer Activities and Substitutions



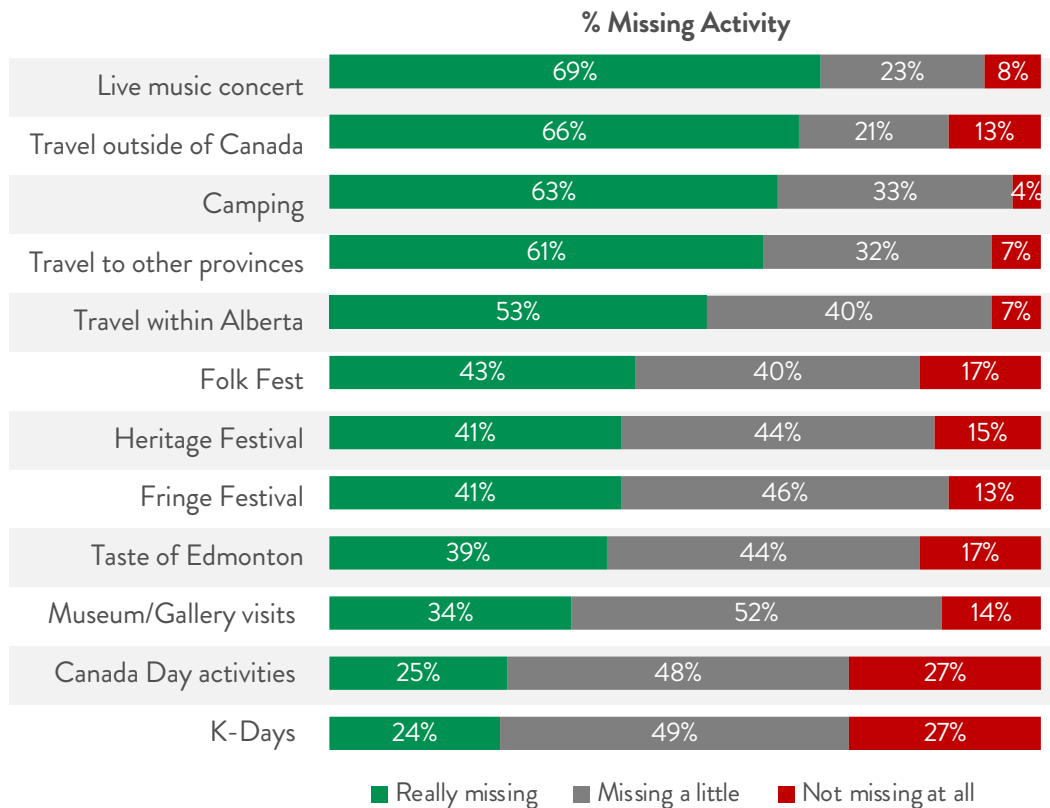
## There is an expansive range of activities that Edmontonians gave up this summer due to COVID-19 – primarily travel and festivals



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)?

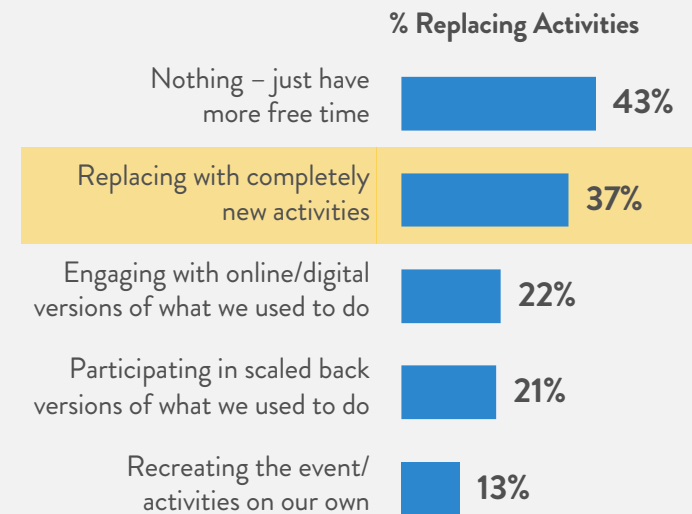
Base: Edmonton sample (n=498)

## 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: Edmontonians who typically participated in each activity (n=varies)

Similar to the province, the number of Edmontonians 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?).

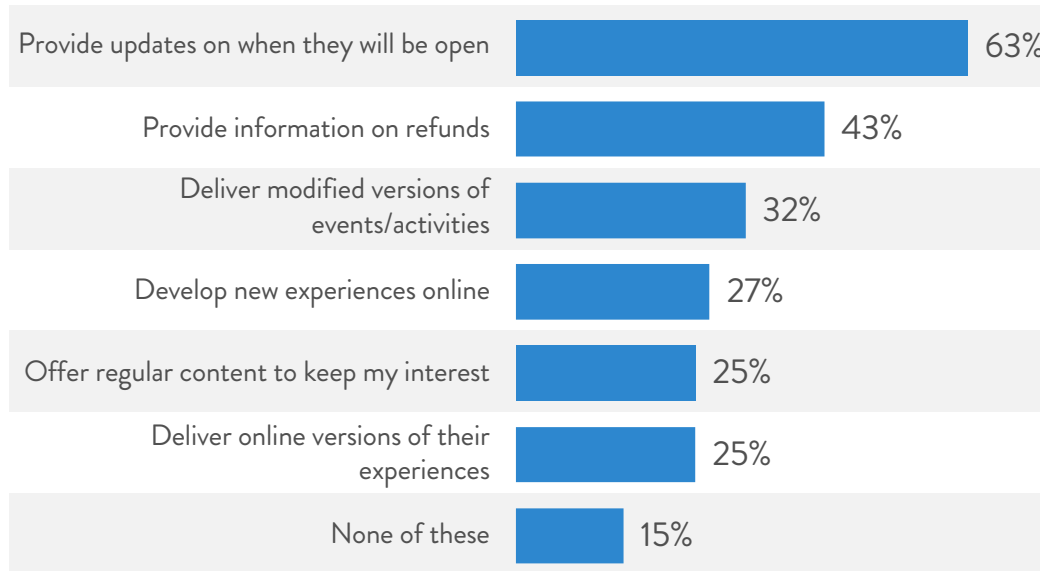


To what extent are you replacing the activities you really used to miss?  
Base: Edmontonians who are 'really missing' at least one activity (n=377)

## Edmontonians want information and transparency from experience organizations

Communication remains critical. First and foremost, Edmontonians simply want to 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 they feel informed, they will be more likely to make decisions on participation, even in modified forms.

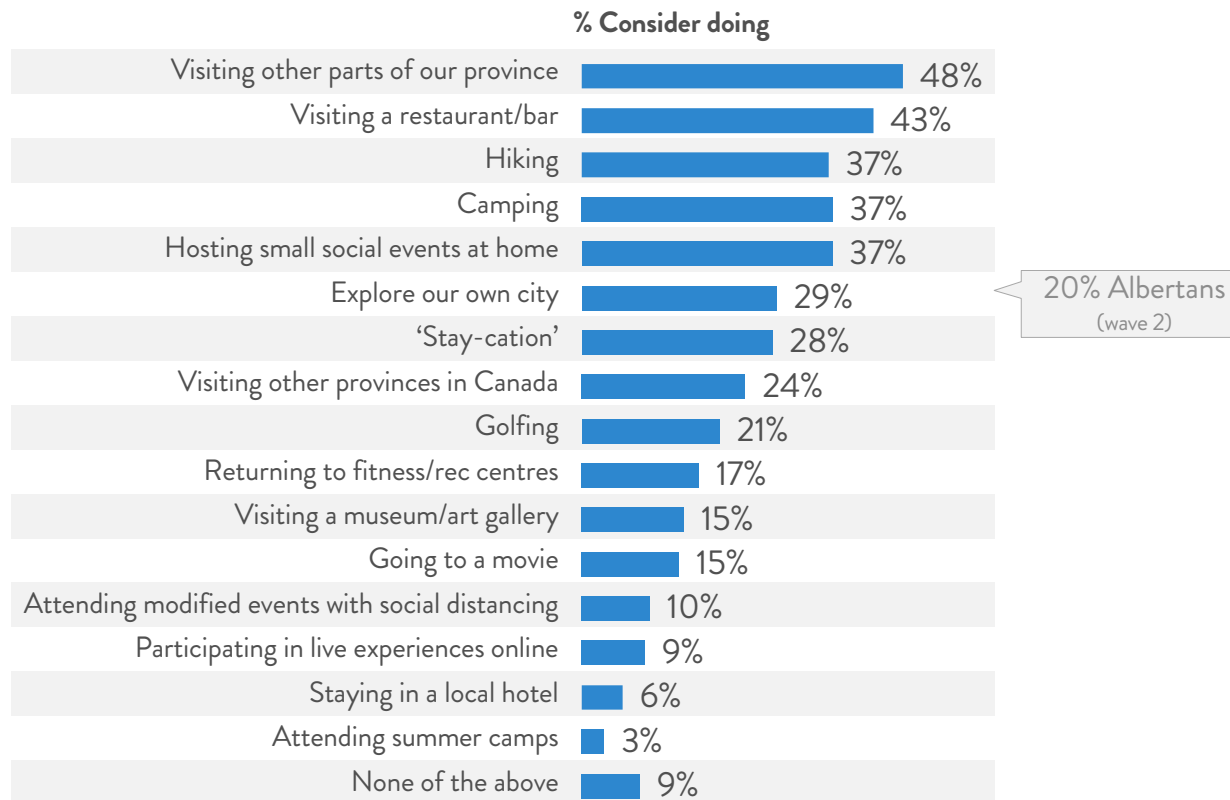
### What experience organizations could be doing:



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: Edmonton sample (n=498)

## What are Edmontonians considering this summer?

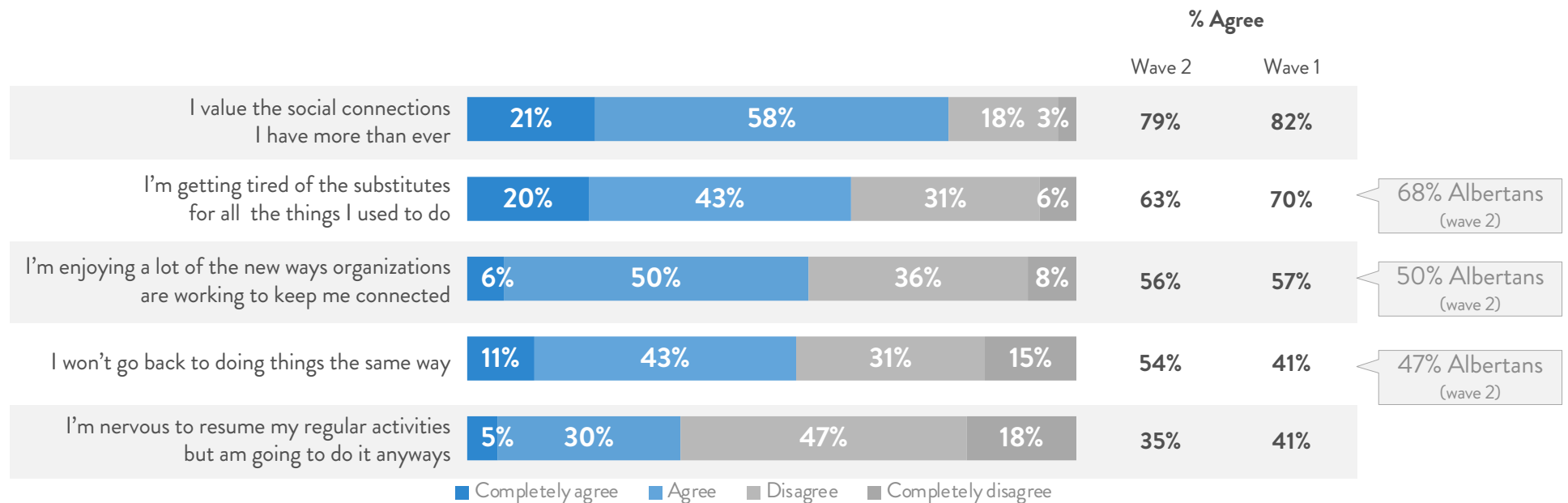
Similar to Albertans, Edmontonians are considering activities to fulfill their main motivation – engagement (social) – while staying within their comfort zone and mainly staying outdoors or in close social circles.



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: Edmonton sample (n=498)

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

Edmontonians are enjoying the new ways organizations are staying connected slightly more than the rest of the province and are experiencing less fatigue with substitutions. Likely a reflection of a lower comfort level or the experiences being offered in their city.

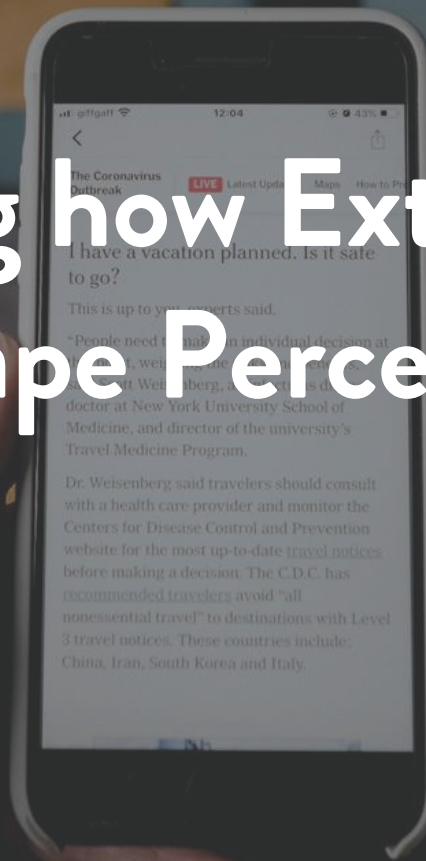


Now that we've asked you about the ways you have been connecting with organizations and activities throughout restrictions, we'd like to understand how you feel at this time. Please indicate your level of agreement with the following statements.

Base: Edmonton sample (n=498)

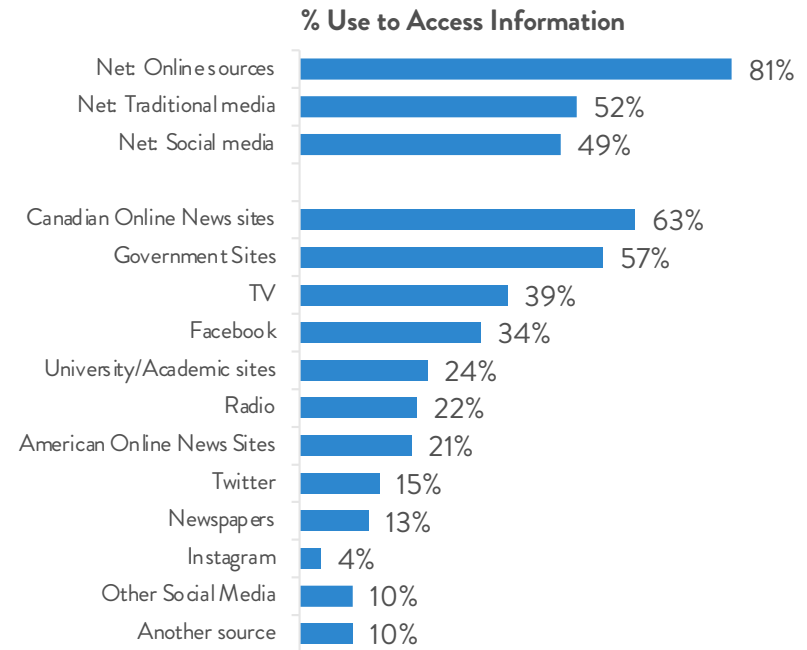
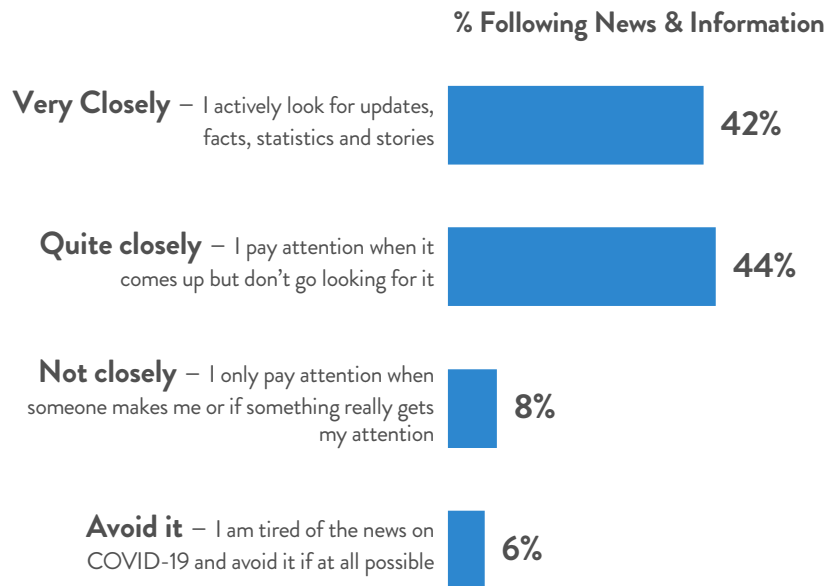


# Understanding how External Influences Shape Perceptions



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

Like the rest of Alberta, the majority are using online sources for information. However, Edmontonians are using slightly more resources to gather information (averaging 3.1 sources versus 2.9 among Albertans overall).

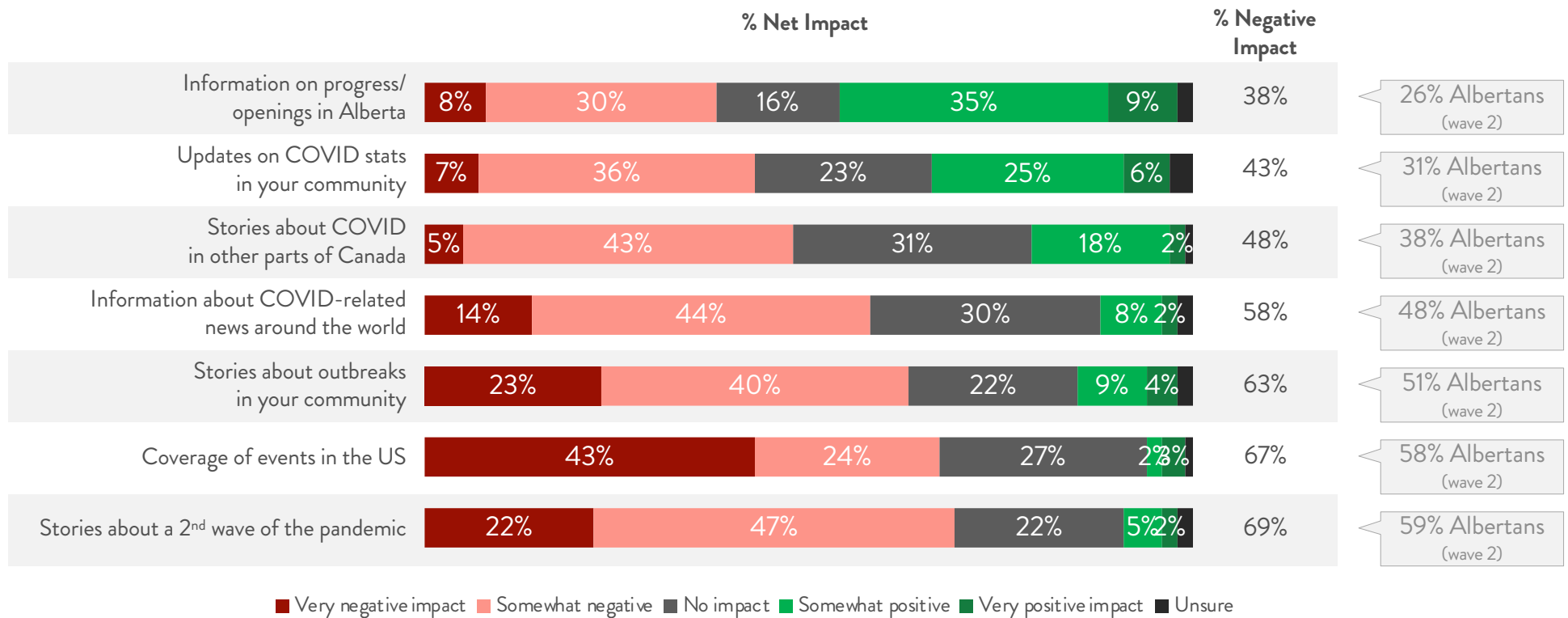


Generally speaking, how closely are you following any news and information about the COVID-19 Pandemic?

Base: Edmonton sample (n=498)

# Overall, news coverage has a larger negative impact for Edmontonians to re-engage with the experience economy

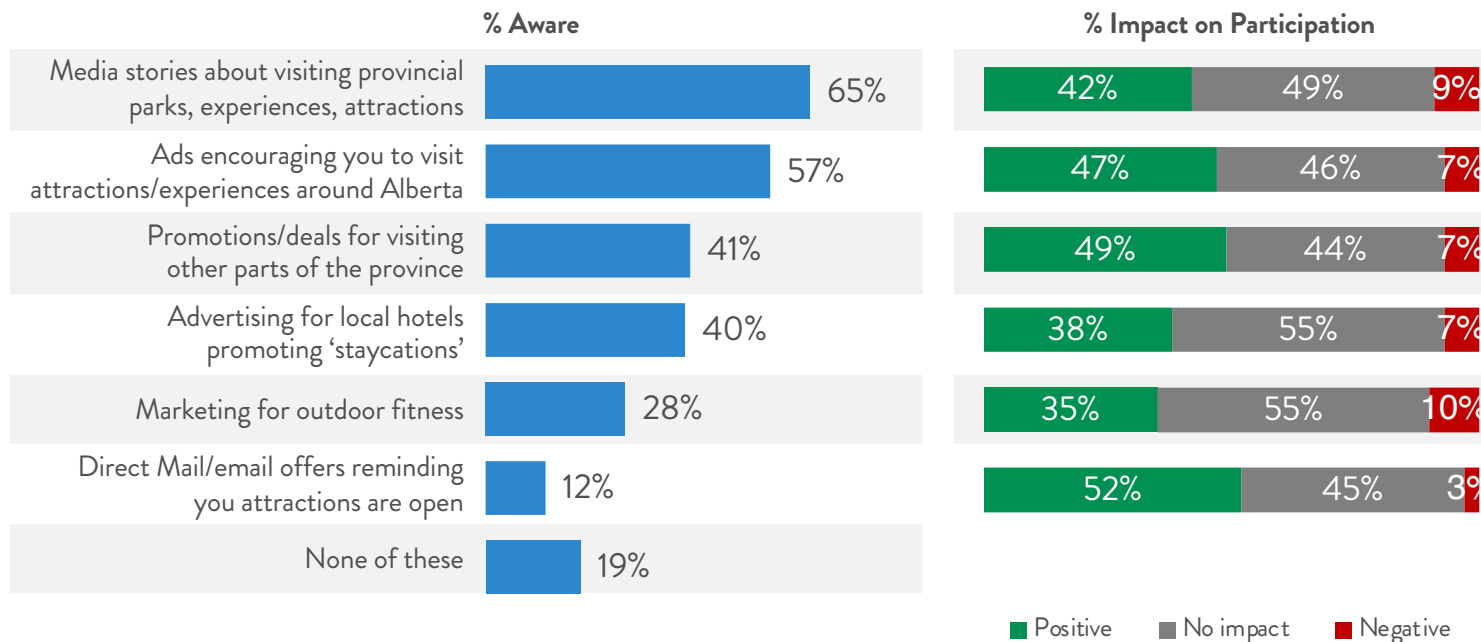
The sharp increase in active cases this summer in Edmonton has had a significant negative impact on the Capital city to consider re-engaging in activities.



What impact, if any, do the following stories have on how you feel about re-engaging with activities you used to do?  
Base: Edmonton sample (n=498)

## However, paying close attention to COVID-19 news also means Edmontonians are noticing current marketing tactics

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: Edmonton sample n=498*

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

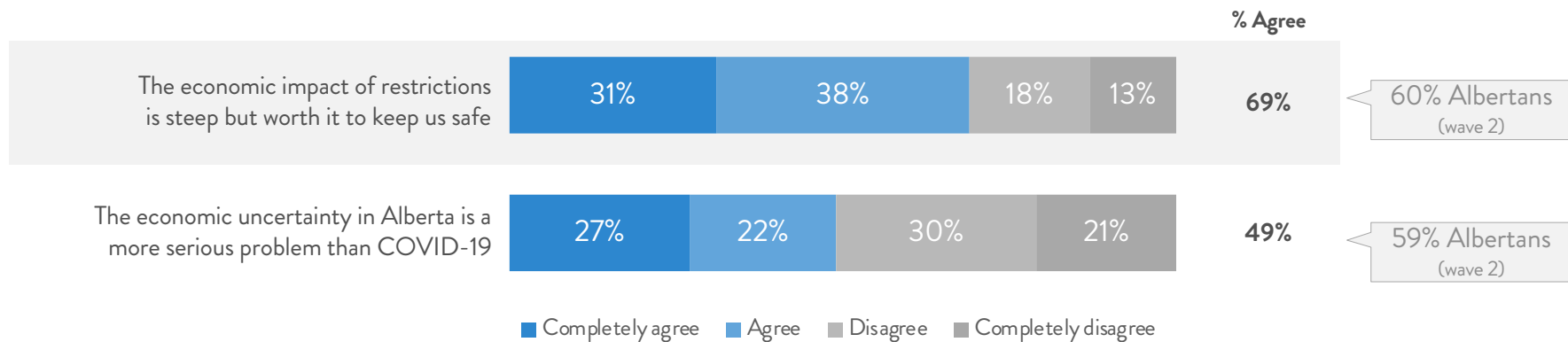
*Base: Aware of each type of marketing/promotion (n=varies)*

# How has Spending Shifted?



## While there is a clear dichotomy between economic uncertainty and the cost of restrictions across the rest of the province, Edmontonians place a greater priority on the pandemic

Even more so than Calgarians, residents of the Capital region agree the restrictions outweigh the economic impacts.



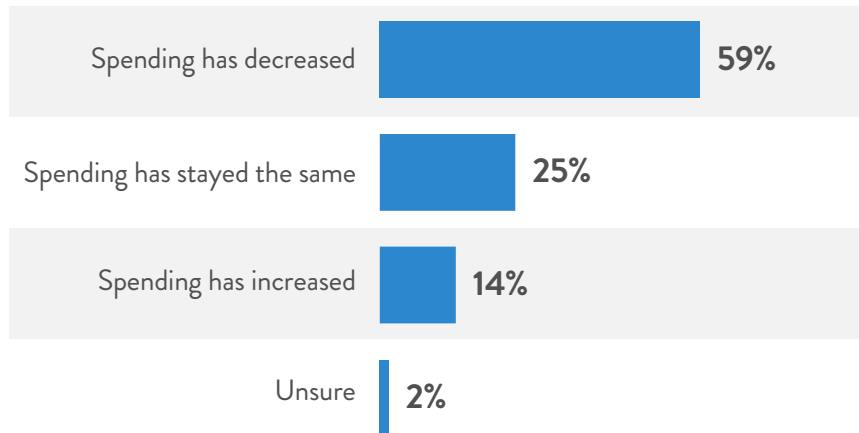
Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.  
Base: Edmonton sample (n=498)



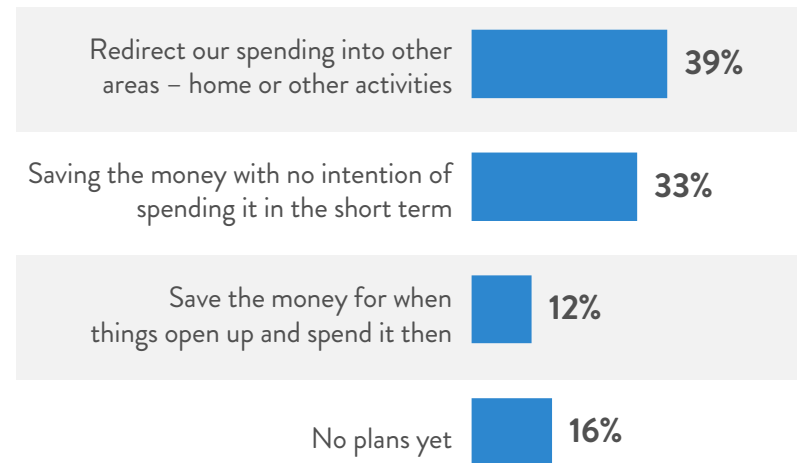
# Discretionary spending has decreased and most Edmontonians have no intention of spending in the short term or are redirecting spend elsewhere

Edmontonians have experienced income reductions at a slightly higher rate than the rest of the province.

## Spending on non-essential items



## Reaction to spending less



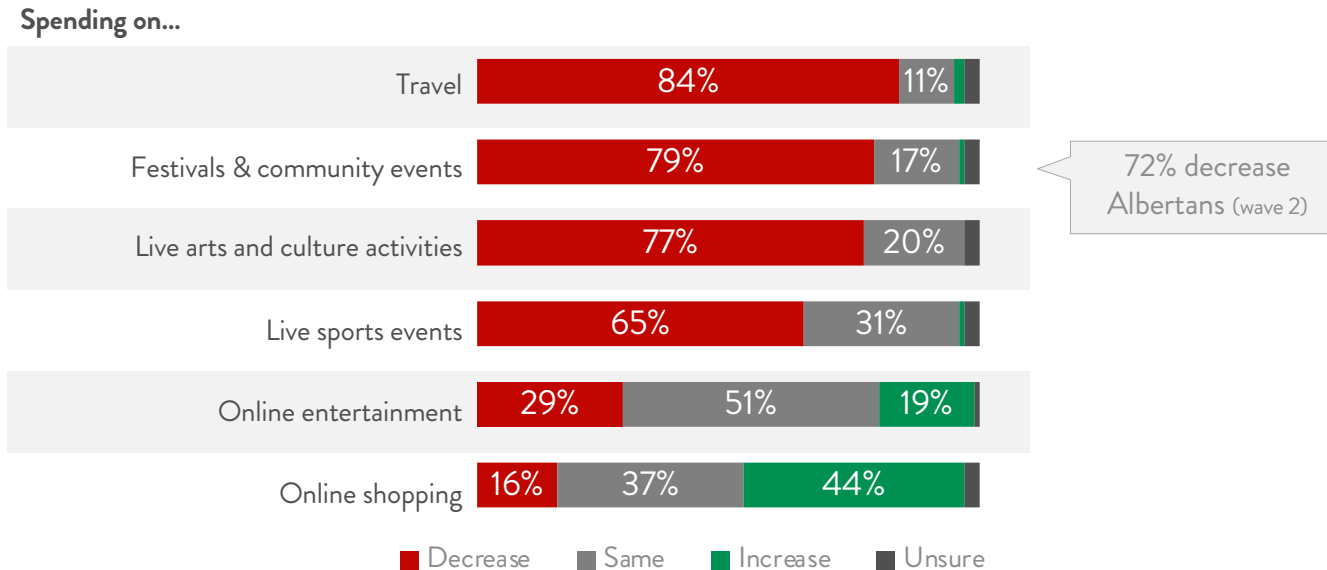
Thinking about your overall spending on non-essential items, would you say your overall discretionary spending has decreased, stayed the same or increase?

Which of the following best describes how your household is most likely to react to spending less during the pandemic?

Base: Edmonton sample (n=498)

## 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 Edmontonians (and the rest of Alberta) have started to spend more in this area.



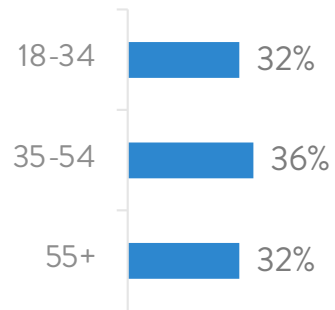
Now thinking more specifically, how has your spending on the following changed?  
Which of the following best describes how your household is most likely to react to spending less during the pandemic?  
Base: Edmonton sample (n=498)

A blurred photograph of a large crowd of people walking on a city sidewalk. The image has a motion blur effect, suggesting a busy, fast-paced environment. The people are wearing various casual clothing like t-shirts, jeans, and hoodies. The background shows a city street with a road and some greenery. The text "Respondent Profile" is overlaid in white, bold, sans-serif font in the center-left area of the image.

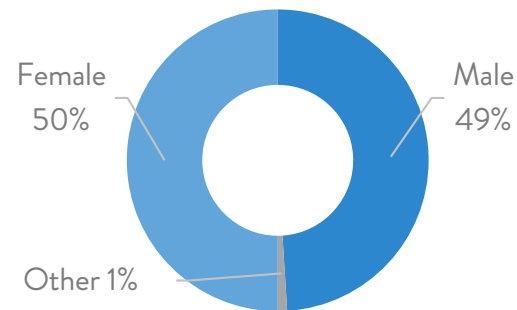
# Respondent Profile

## Who We Heard From (Edmonton)

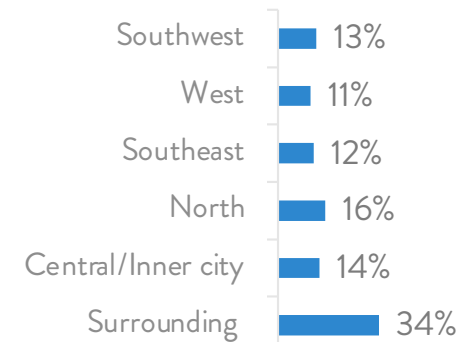
### Age



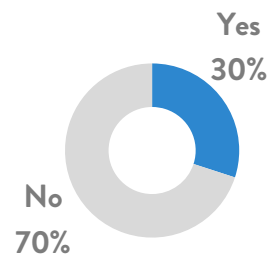
### Gender



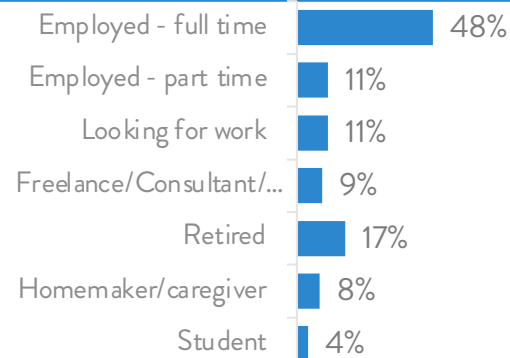
### Location



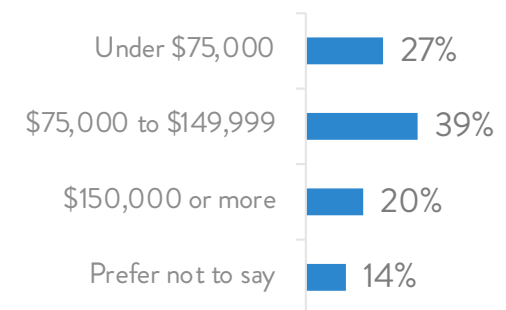
### Children in the Household



### Employment

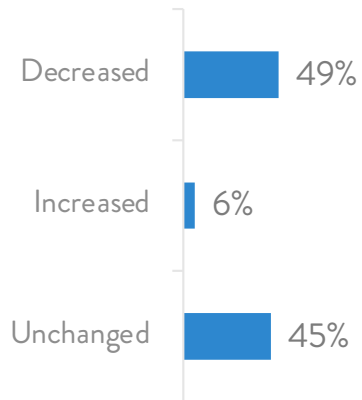


### Household Income

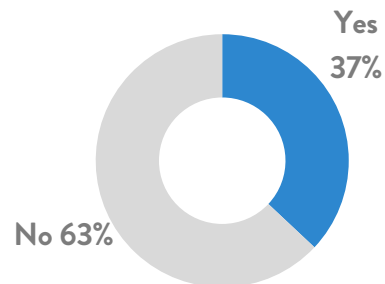


## Who We Heard From (Edmonton)

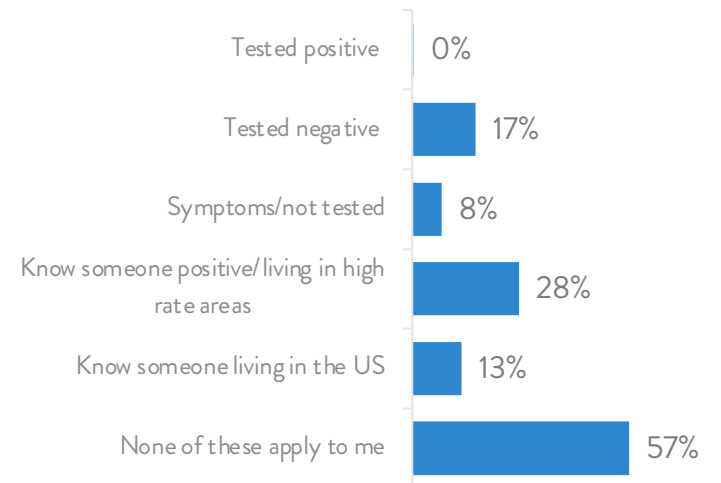
### Income Changes (COVID)



### Accessing Government Benefits



### Connection to COVID



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