

The background image shows an indoor swimming pool. A swimmer is in the water on the right side, and a lifeguard in a red shirt stands on the pool deck on the right. The pool deck is tiled, and there are some signs on the wall in the background.

The NEW Experience Economy:

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

Phase 6 Results
July 2021

Table of contents

- 4 Background & Purpose
- 5 Overview of Research Process
- 7 COVID Contexts: Progression & By the Numbers
- 9 Phase 6 Outcomes: Findings and Implications for Alberta Organizations
- 15 Comfort Levels, Risk Tolerance, and Consumer Mindset
- 22 How Do Albertans Feel About Re-opening?
- 30 Consideration for Engagement and Barriers to Address
- 36 Spending Habits and Messaging Opportunities
- 40 Respondent Profile

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.**



Background & Purpose

The overarching 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 where we are right now and to continue building recovery solutions that enable organizations in these important sectors to adapt and thrive.

Now more than a year into the pandemic, restrictions are shifting again along with the availability of experiences for Albertans. The sixth round of research focuses on the following:



Monitoring key attitudes, consumer mindset, measures of comfort and risk;



Explore consideration for activities and events as restrictions lift;



Identify barriers for engagement and inform communication strategies; and,



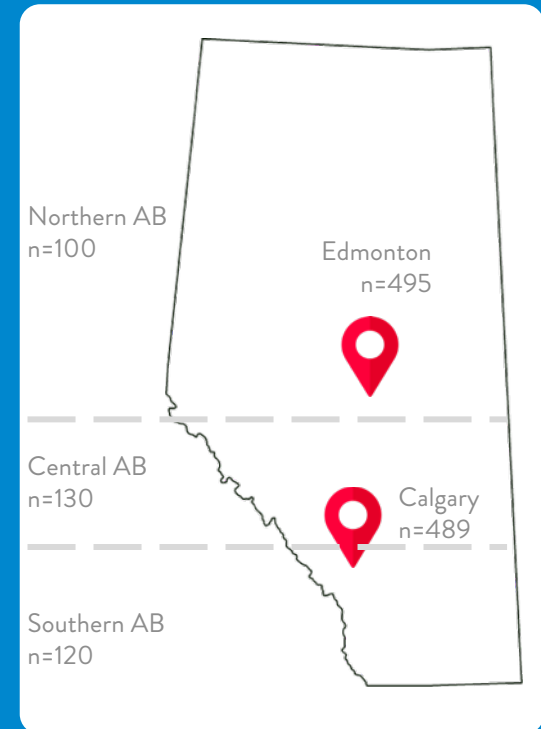
Understand how attitudes towards vaccines might impact behaviours and engagement.

Overview of Research Process:

The research process is designed to run in regular intervals over the course of one year (a total of six phases) to assist organizations in planning effectively over the long term.

Results presented represent the findings from Phase 6. All phases follow the same methodology.

- Online (longitudinal) 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 1,333 Albertans participated in this sixth phase of research. Responses include 1,034 regionally balanced core sample, plus supplemental (booster) responses for Calgary and Edmonton.
- The longitudinal survey includes 75% of respondents retained from phase 5 (9% participated in at least one phase prior to phase 6 and 16% of respondents are new for phase 6).
- Data collection occurred between June 4 to June 21, 2021.
- 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.

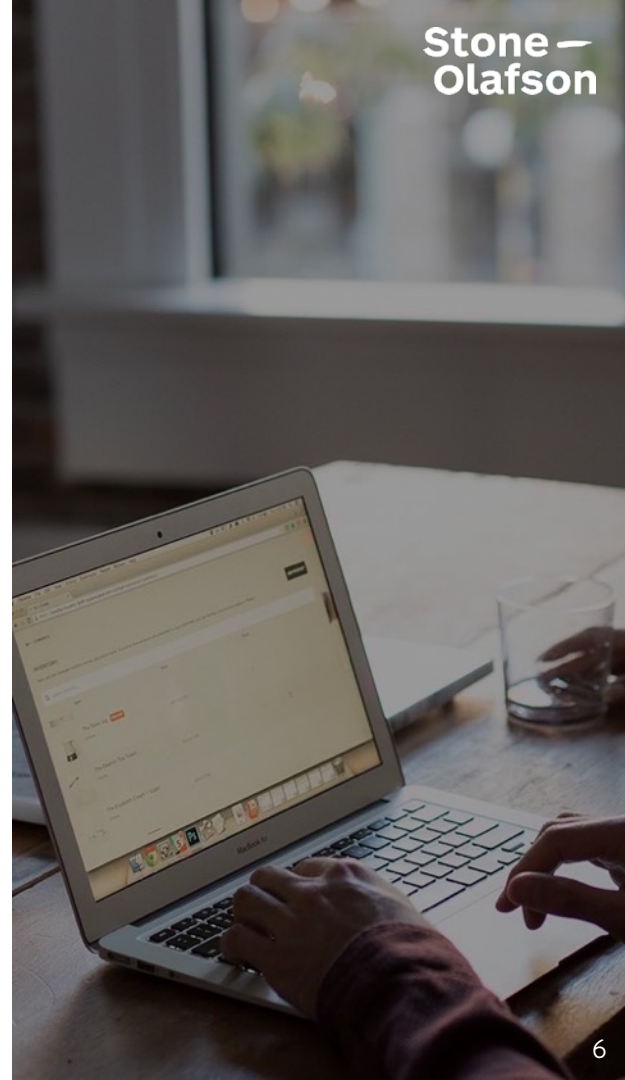


Additional Notes on Reading the Report

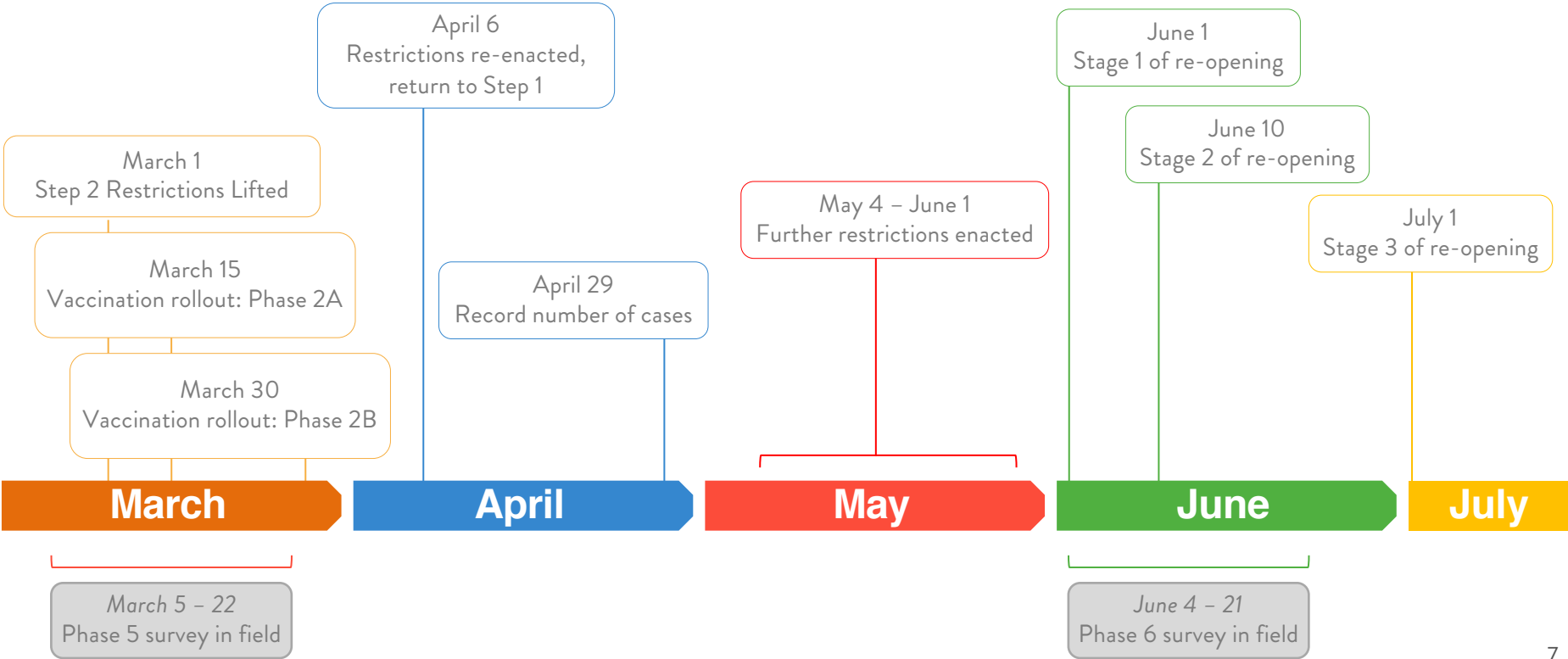
Numbers presented have been rounded and sums may not correspond exactly to numbers in the detailed data tables made available.

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

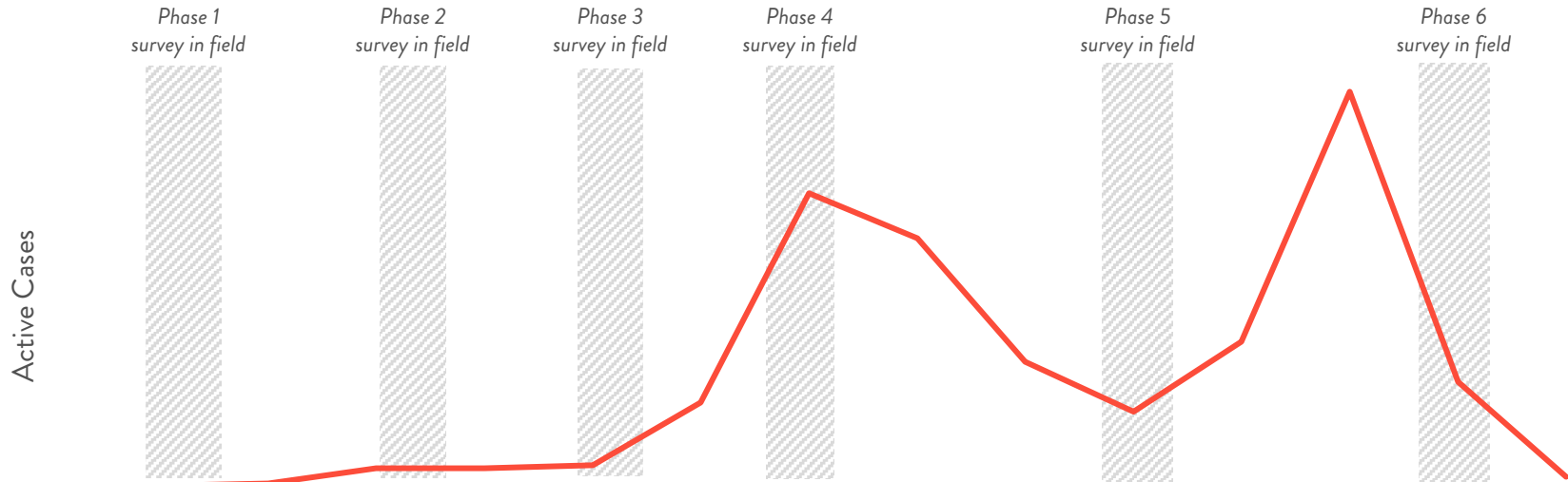
Due to the inclusion of online, non-random sampling, a standard margin of error is not calculated for the results. However, an *approximate* rate of reliability typically associated with an overall sample of this size would be +/- 2.7%, 19 times out of 20.



Mapping the progression of COVID-19 in Alberta



Context matters

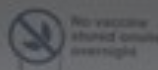
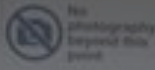
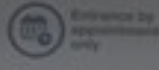
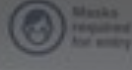


	June 2020	July 2020	Aug. 2020	Sept. 2020	Oct. 2020	Nov. 2020	Dec. 2020	Jan. 2021	Feb. 2021	Mar. 2021	Apr. 2021	May 2021	June 2021	July 2021
Total Active Cases (Alberta)	397	541	1,379	1,400	1,557	5,153	17,044	14,510	7,448	4,620	8,610	22,845	6,304	892
% Change (previous month)	-87%	36%	+155%	+2%	+11%	+231%	+231%	-15%	-49%	-38%	+86%	+165%	-72%	-86%
Hospitalizations	86	44	86	50	64	140	504	921	556	261	292	648	435	144



Immunization Clinic

CALGARY TELUS CONVENTION CENTRE - NORTH BUILDING



Phase 6 Outcomes: Findings and Implications for Alberta Organizations



1.

Comfort and risk shifting in a positive direction

As we've seen through the last year and a half, comfort has developed into a very predictable pattern that follows case numbers and now vaccine rates. As cases now fall and vaccine rates continue to rise, the polarization in comfort is diminishing. As a whole, low comfort levels are ebbing and moving Albertans to higher comfort (although the largest proportion still lies in the middle range). The combination of dropping case numbers and vaccine rollout to-date seems to be highly impactful when it comes to easing comfort, although there is the risk that tides could shift again if case numbers rise again in the coming months.

This is a reminder to all organizations that understanding basic comfort levels allow you to respond to how your audience is feeling.

Why does this matter? Even as restrictions have been removed, organizations still need to deal with comfort. As it stands, there is clear hesitancy in the audience and it will be important to communicate safety measures to make audiences comfortable when re-engaging.

2.

But Albertans will return at their own pace

As comfort makes clear progress, the Government announcements on re-opening and subsequent lifting of restrictions does not automatically translate into participation from Albertans – this very much hinges on personal comfort but also personal risk tolerance. While the risk takers are ready to go and are willing to return to most activities right away, the risk reducers (largest proportion of Albertans) and risk avoiders have more of a “wait and see” mentality. These Albertans will continue to follow case numbers and vaccine rates to determine how and when they want to engage. It’s not about *if* they will, but *when* they will participate again – and in what form.

Why does this matter? Organizations should keep in mind that public sentiment is a more useful barometer over government announcements. Gauging expectations for increased participation to occur will be based on a combination of comfort and risk tolerance. Because of this, there will be expectations (that may last) where some audiences will want similar programming that was offered during the pandemic, while others will want to experience in-person – so a move to hybrid offerings is still valid.

3.

Some things are here to stay.

The pandemic has been transformative in many ways and there is a consensus that there will be less of a return to “normal” but rather a new way of doing things moving forward. Given the slow shift in comfort, organizations can expect this for certain aspects of business.

Over time, some of the more stringent safety measures may ebb but organizations should expect more permanent (structural) changes to stick around – specifically related to organizational transparency, flexibility with refunds, new payment options, etc. These should be things that organizations consider keeping even if they are no longer required by the government.

Why does this matter? This becomes a consideration for long-term planning. Many organizations are doing this and there are several examples of those who have revamped booking systems, policies, etc. but for others, it should serve as a reminder that as you try to grow participation and profits, you may need to keep certain policies that align with consumer expectations and will support customer experiences (which ultimately leads to consideration).

4.

Navigating choices requires the right message

Outcomes demonstrate there is clearly a pent-up demand growing to return to activities that haven't been available. But because Albertans have spent the past year and half discovering new things to do, the selection of what they can choose from now is quite vast.

Even though the demand or consideration for travel appears to very high (as this was an area that experienced some of the most stringent restrictions), understanding some of the safety measures that consumers will need to consider your activity can help with navigating choice as can crafting the appropriate message. For example, consideration for travel will still require the most complete set of safety measures to make people safe, along with indoor activities – outdoor activities can have slightly less stringent requirements. And messaging can focus on safety, ease, and socializing again.

Why does this matter? Consider the elements of your experience (indoor vs. outdoor, etc.) to help understand the specific safety measure you might need to employ to increase comfort. Design your messaging to resonate – for example, messages around feeling normal, socializing again or experiencing an escape will resonate more strongly than “wow” or different for Albertans who are craving comfort and stability, at least right now.

5.

Spending habits are markedly different

There is some notion that consumers have halted spending over the course of the pandemic and will be ready to spend as soon as experiences become more fully available. But as the pandemic has progressed, we know that simply to be untrue. There has been a significant portion of Albertans who have saved money, but many others have simply diverted their spending to other things (whether that be new hobbies or things like household projects). This also doesn't account for whose income has decreased as a direct result of the pandemic. In short, spending habits are in flux and at this point, it is difficult to predict where Albertans will direct their money in the short term.

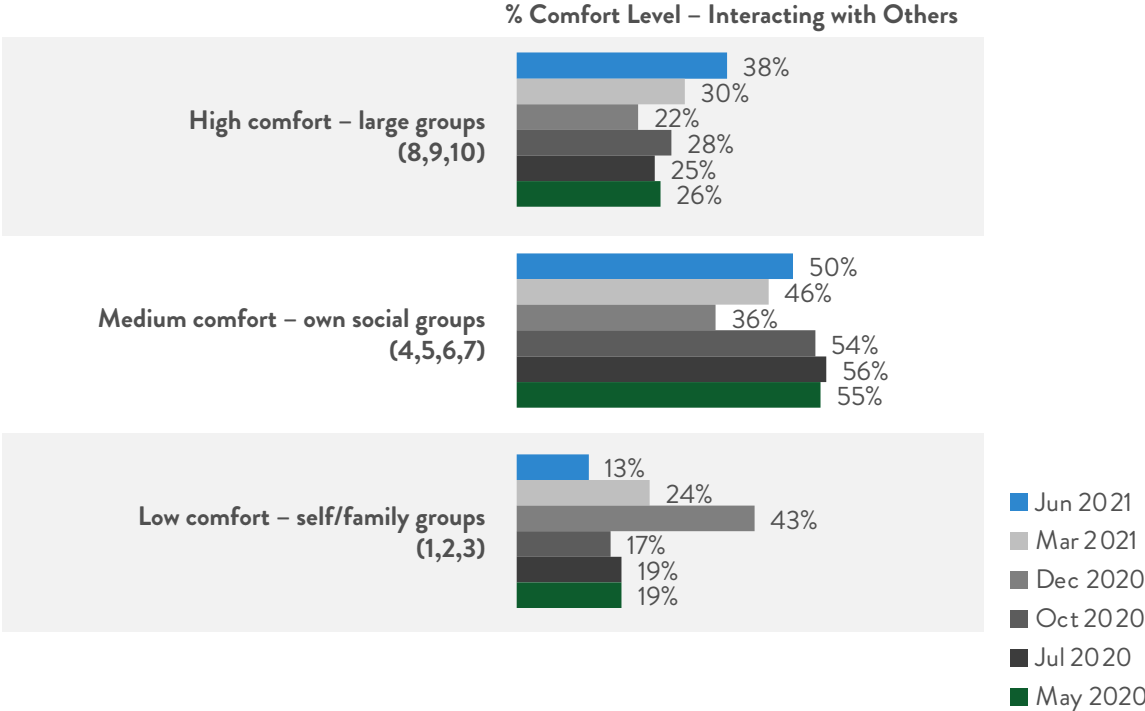
Why does this matter? The main consideration for organization remains flexibility – in terms of payment options, participation options, etc. This will allow for consideration on different levels as Albertans suss out how they want to direct their spending. Pricing increases are not off the table – Albertans can understand value as well as the need to support post-pandemic recovery but options for flexibility and perhaps different pricing options should be considered alongside.

A photograph of an outdoor cafe seating area on a city street. The scene is set on a sidewalk in front of a brick building. There are several tables and chairs, some of which are yellow and pink. A black metal railing and a yellow stanchion with a chain are visible in the foreground. In the background, there are more tables, chairs, and people sitting. A sign for 'DOSC' is visible on the building. The text 'Comfort levels, risk tolerance, and consumer mindset' is overlaid in white on the image.

Comfort levels, risk tolerance, and consumer mindset

Comfort interacting with others is on the rise

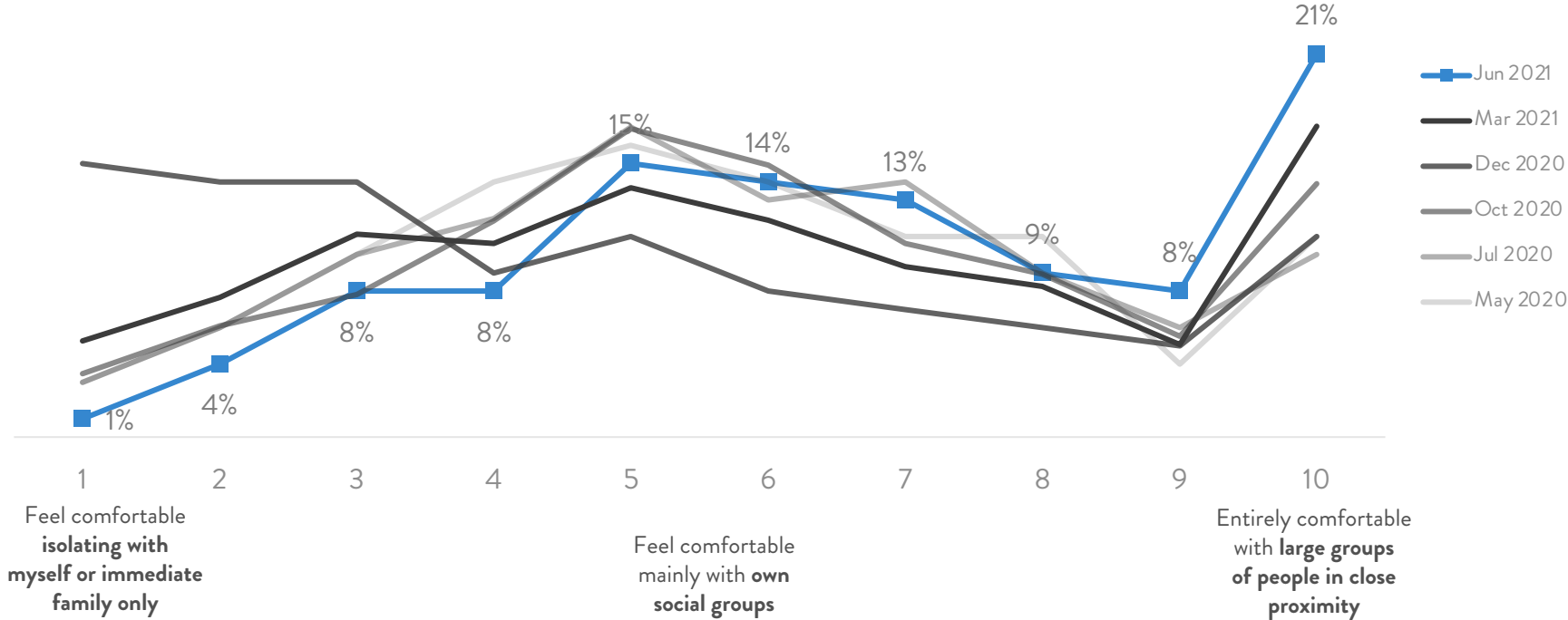
During this phase, case numbers dropped while vaccine rates increased at the same time, and Albertans are feeling the most comfortable around people since the early days of the pandemic in 2020.



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=1034).

Comfort continues to follow case numbers, vaccines rates, and levels of restrictions

% Comfort level – Interacting with Others



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=1034)

Regional differences with comfort remain apparent

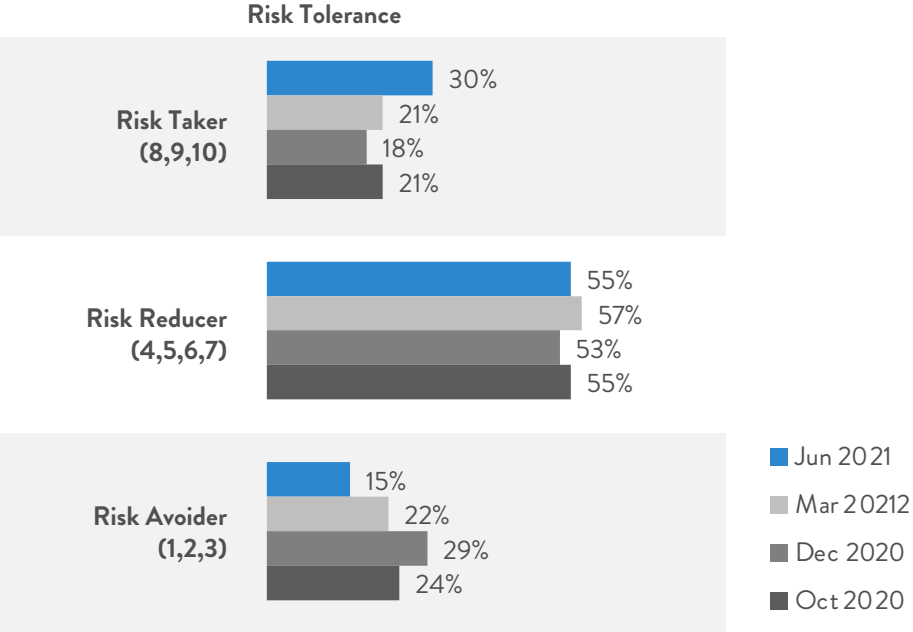
While rural areas continue to have higher comfort levels overall, city centres are making strides with a shift to a mid-level comfort – both Edmonton and Calgary have seen a sharp decrease in those who have a “low” comfort level interacting with others.

		% Comfort Level Interacting with Others					
		Jun 2021	Mar 2021	Dec 2020	Oct 2020	Jul 2020	May 2020
Calgary	High Comfort	34%	33%	26%	22%	25%	21%
	Medium Comfort	54%	44%	55%	58%	56%	37%
	Low Comfort	13%	24%	19%	21%	19%	42%
Edmonton	High Comfort	28%	24%	19% ↓	19%	23%	16%
	Medium Comfort	56%	49%	58%	58%	58%	37%
	Low Comfort	15%	27%	22%	24%	19%	47%
North	High Comfort	57% ↑	44% ↑	42% ↑	33%	39% ↑	29%
	Medium Comfort	37% ↓	39%	45%	58%	42% ↓	44%
	Low Comfort	7%	17%	13%	9%	19%	26% ↓
Central	High Comfort	48%	35%	38%	26%	30%	29%
	Medium Comfort	45%	44%	51%	59%	57%	36%
	Low Comfort	7%	21%	11%	15%	13%	35%
South	High Comfort	47%	40%	30%	30%	30%	27%
	Medium Comfort	40%	47%	54%	55%	51%	34%
	Low Comfort	13%	14% ↓	16%	15%	19%	39%

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=1034). Note: Calgary + Edmonton include supplemental sample

A shift in risk tolerance is starting to emerge

Over the course of the pandemic, risk tolerance levels have remained relatively stable throughout. For the first time, we are seeing a fairly notable shift and while the majority of Albertans continue to fall into the risk reducer category, there is a growing number of risk taskers - this is driven both by those who perceive their tolerance for personal risk is growing as well as their desire to engage in activities regardless of risk.



AVERAGE RISK TOLERANCE: In general, how would you consider your individual level of risk tolerance in day-to-day life? How would you rate your risk of disease with respect to COVID-19? Now thinking about the activities you participate in and value most, how would you assess their overall importance?

Base: Main sample (n=1034). Note: Calgary + Edmonton include supplemental sample

Rural areas have a higher risk tolerance compared to city centres

But as with comfort, there are distinct difference by region with rural areas having a higher proportion of risk takers overall. Participation will ultimately hinge on alignment with risk tolerance levels which is a reminder that the lifting of restrictions will not mean the same level of engagement for all Albertans.

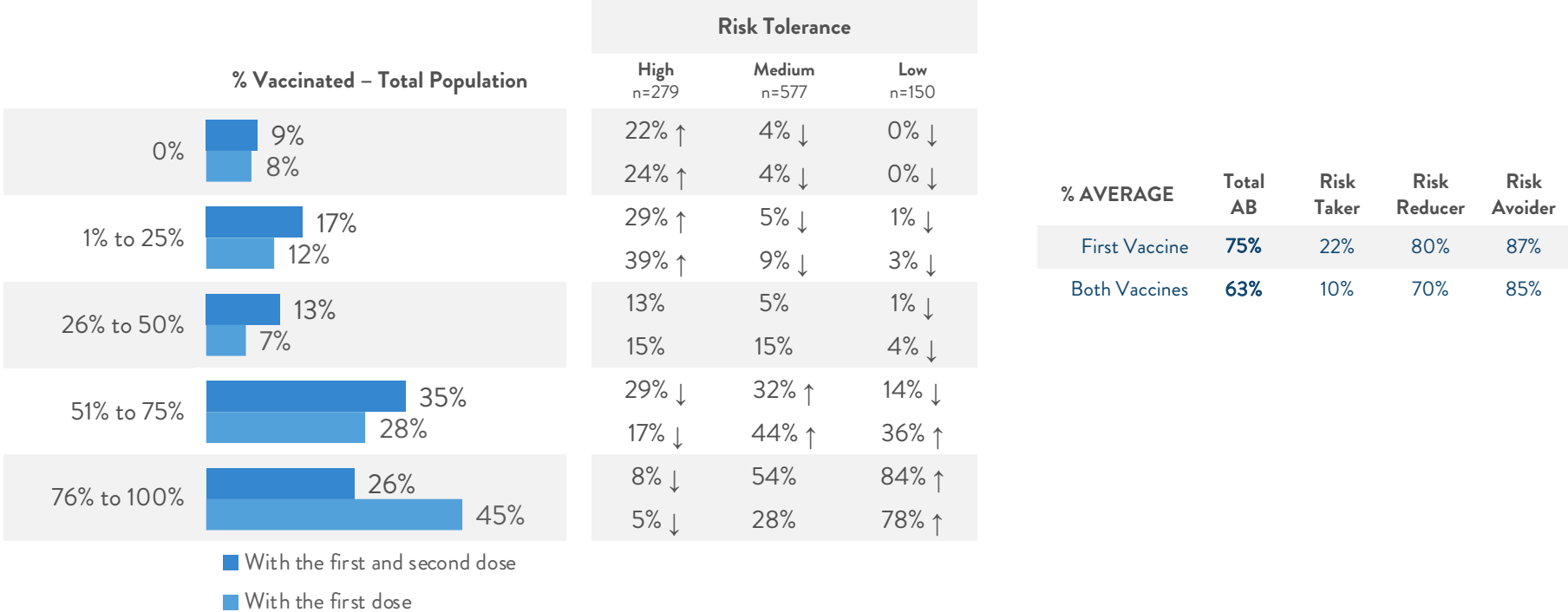
	<i>Risk Tolerance</i>	Jun 2021	Mar 2021	Dec 2020	Oct 2020
Calgary	Risk Taker	26%	23%	19%	20%
	Risk Reducer	59%	58%	54%	58%
	Risk Avoider	16%	19%	27%	22%
Edmonton	Risk Taker	23% ↓	16% ↓	13%	14% ↓
	Risk Reducer	61%	57%	54%	56%
	Risk Avoider	17%	27% ↑	32%	30%
North	Risk Taker	36%	33% ↑	23%	32% ↑
	Risk Reducer	54%	50%	53%	46%
	Risk Avoider	10%	17%	25%	22%
Central	Risk Taker	42% ↑	28%	24%	25%
	Risk Reducer	46%	54%	53%	51%
	Risk Avoider	12%	18%	24%	24%
South	Risk Taker	38%	27%	22%	25%
	Risk Reducer	49%	58%	48%	52%
	Risk Avoider	13%	15%	30%	23%

AVERAGE RISK TOLERANCE: In general, how would you consider your individual level of risk tolerance in day-to-day life? How would you rate your risk of disease with respect to COVID-19? Now thinking about the activities you participate in and value most, how would you assess their overall importance?

Base: Main sample (n=1034). Note: Calgary + Edmonton include supplemental sample

Vaccinations remain a key component to increasing comfort levels

Albertans hope to see 75% of the population vaccinated (on average) with the first dose only to feel most comfortable engaging and an average of 63% of the population with both vaccines doses. This shows significant variation by risk profile.



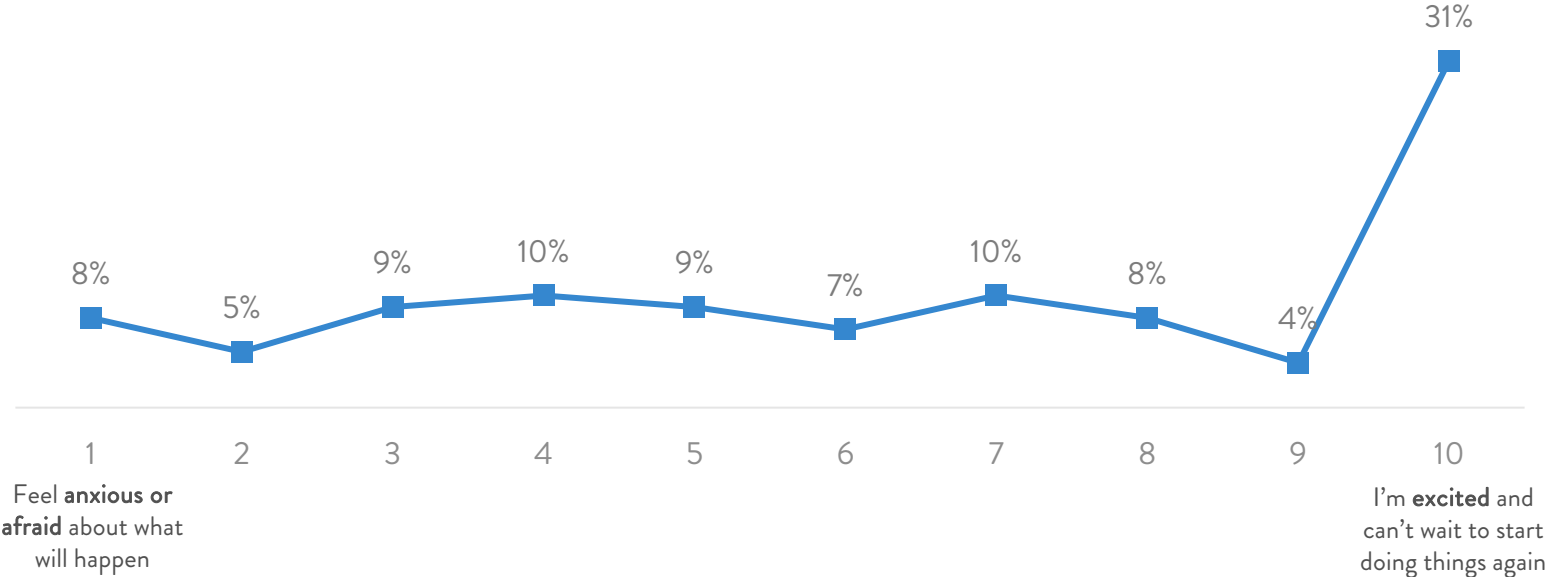
About what proportion of the population needs to be vaccinated in order for you to be completely comfortable engaging in public events and activities again? Please provide your best estimate.
 Base: Main sample (n=1034)

A photograph of a park entrance. In the foreground, a woman in a dark jacket and blue jeans stands on the left, looking at her phone. Next to her is a young child in a colorful, rainbow-patterned jacket and a blue hat. In the center, a man in a red and white baseball cap, a dark jacket, and grey pants stands with his back to the camera, looking towards a sign. A small child in a blue jacket and patterned pants stands in front of him, reaching up. To the right, a line of people is waiting, including a woman in a white jacket and blue jeans, a woman in a red jacket, and a woman in a blue jacket. A stroller is visible in the line. In the background, there is a building with a sign that says "ADMISSIONS" and a sign that says "PAY HERE". The sky is overcast.

How do Albertans feel about re-opening?

Feelings towards re-opening vary but there is a high proportion who are excited and eager to engage

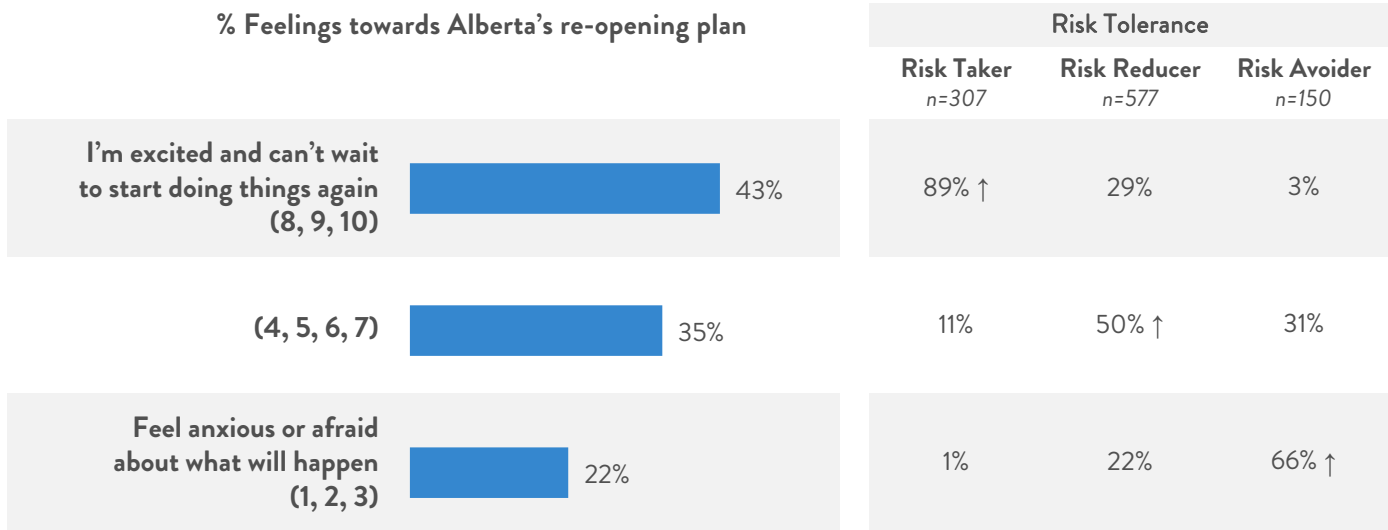
% Feelings towards Alberta's re-opening plan



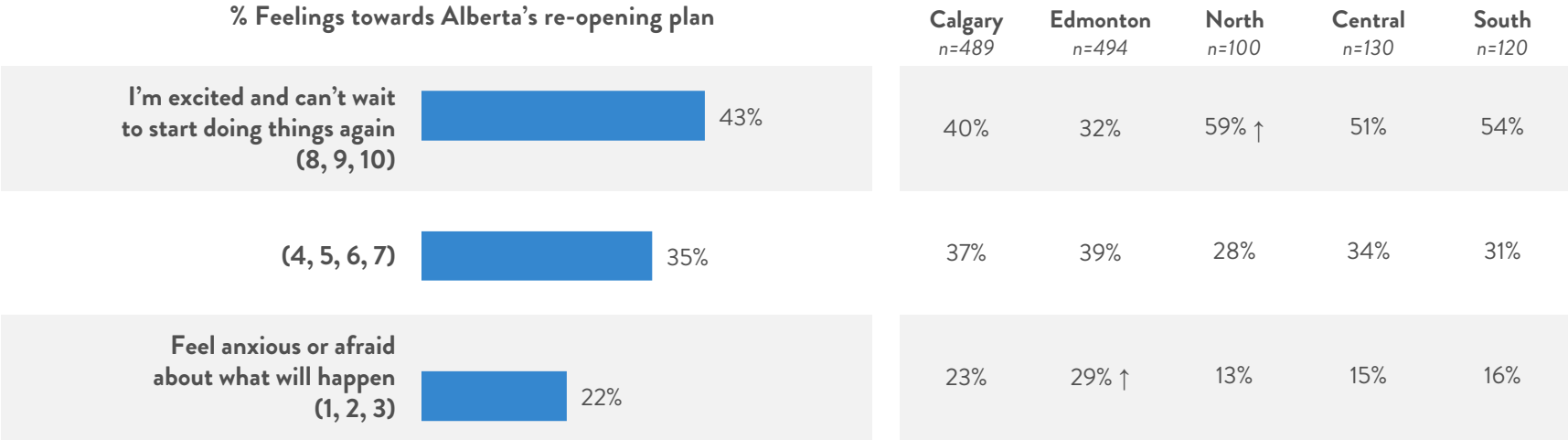
Alberta recently announced its plan for re-opening in time for summer. How do you feel about it?
Base: Main sample (n=1034)

Excitement towards re-opening directly aligns with risk profiles

More Albertans are excited than anxious, but stark differences emerge by risk tolerance once again. Organizations should identify where their audience sits in terms of risk – some Albertans are ready to return and some who remain hesitant and will continue to look for other ways to engage which may impact programming decisions.



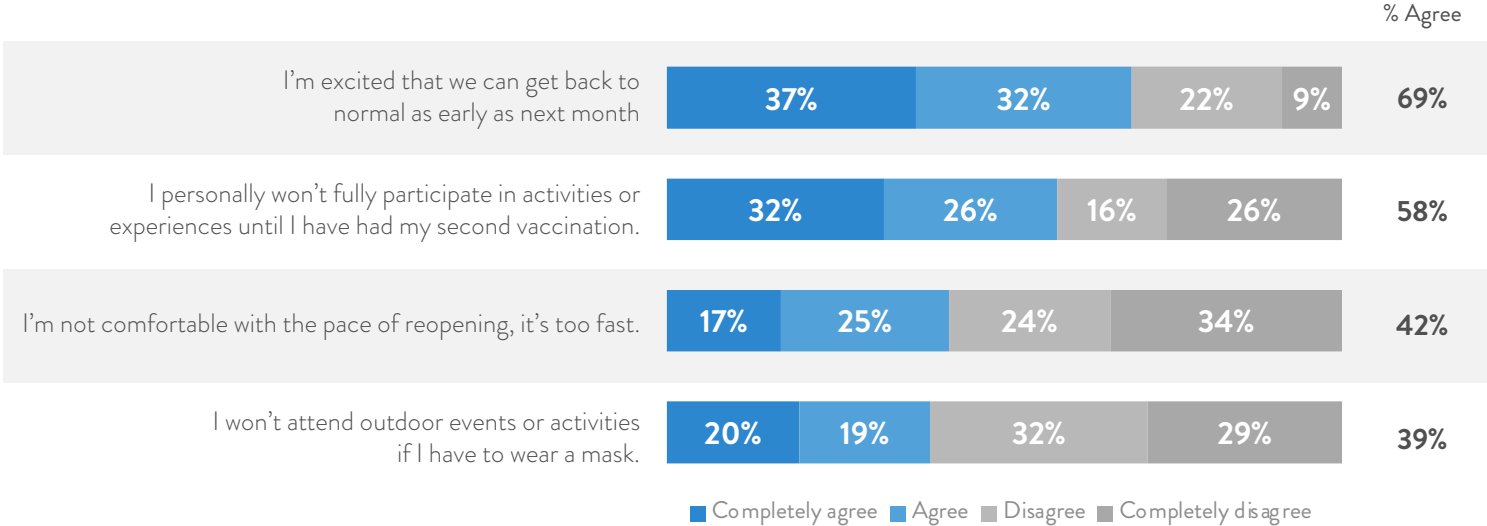
Regional differences remain consistent with caseload with more hesitancy coming from city centres



Alberta recently announced its plan for re-opening in time for summer. How do you feel about it?
Base: Main sample (n=1034)

Albertans feel a cautious excitement as restrictions loosen

It is clear most Albertans are excited to get back to normal but there is a significant proportion that is less comfortable with re-opening or expects their participation to hinge on measures like vaccinations or mask wearing. Interestingly, while polarization at a broad level might be softening, there is some evidence it might be reflected in specific measures like those who insist on vaccines vs. those who will not wear masks which has a great impact on their decision to return to activities.



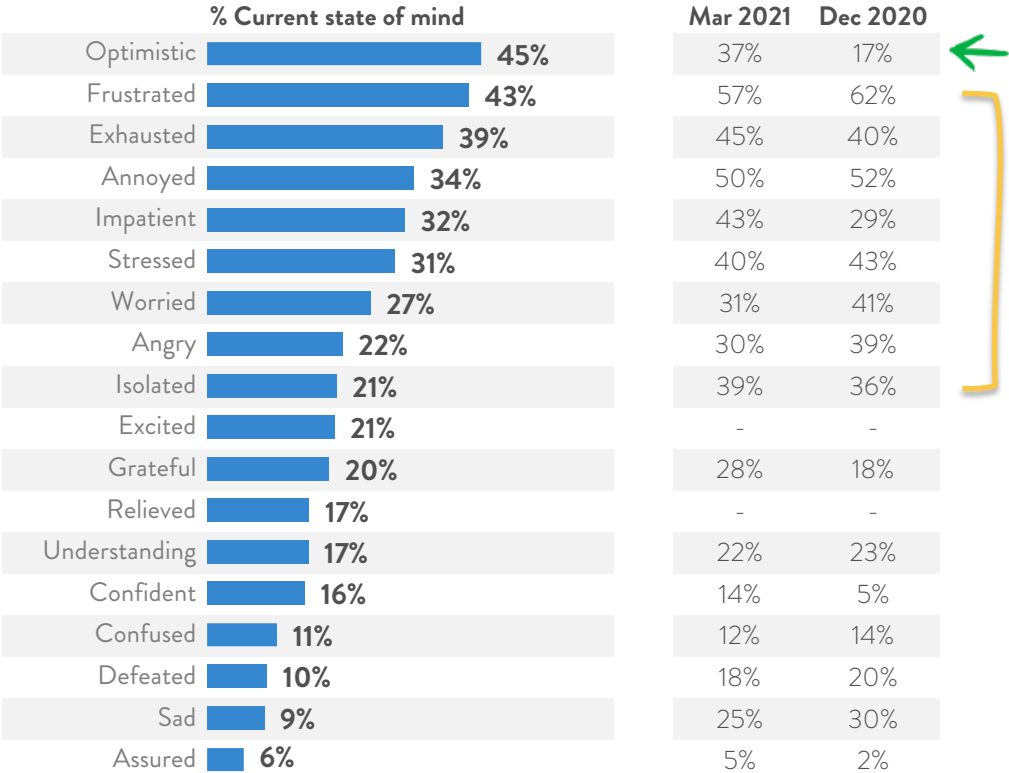
Differences in attitudes are sharpened by risk profile

Those with a higher risk tolerance will have a more immediate return to activity, while lower risk profiles will have a slower and varied approach. Regionally, city centres show greater hesitation to return to normalcy.

	% Agree	Total Alberta	Risk Tolerance			Region				
			High n=307	Medium n=577	Low n=150	Calgary n=489	Edmonton n=495	North n=100	Central n=130	South n=120
I'm excited that we can get back to normal as early as next month	69%		96% ↑	65% ↑	29%	67%	62% ↓	83% ↑	76%	80% ↑
I personally won't fully participate in activities or experiences until I have had my second vaccination.	58%		13%	72% ↑	97% ↑	62% ↑	67% ↑	41% ↓	45% ↓	50%
I'm not comfortable with the pace of reopening, it's too fast.	42%		4%	50% ↑	85% ↑	46%	53% ↑	25% ↓	31% ↓	27% ↓
I won't attend outdoor events or activities if I have to wear a mask.	39%		69% ↑	28%	17%	38%	31% ↓	45%	43%	44%

Optimism is growing but negative emotions are still present

While feelings of frustration, exhaustion, annoyance, and impatience still occupy consumer minds, they are softening and many are showing more confidence in the current situation.



What words describe how you might be feeling right now? Please select all that apply.
Base: Main sample (n=1034)

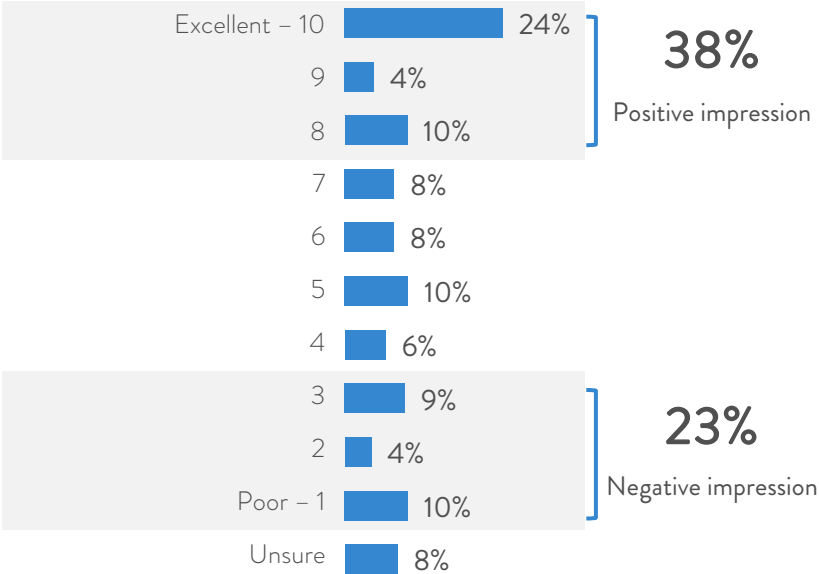
The majority understand that organizations need to re-open even if Albertans aren't fully ready

But the perception of organizations that put on live events this summer is mixed and once again, this is heavily dependant on risk tolerance levels. On a regional level, Edmontonians are least likely to perceive organizations in a positive light (31%).

61%
 AGREE
 (34% strongly agree + 27% agree)

Activities and events need to go ahead even if not everyone is comfortable.

% Impression of organizations preparing for summer

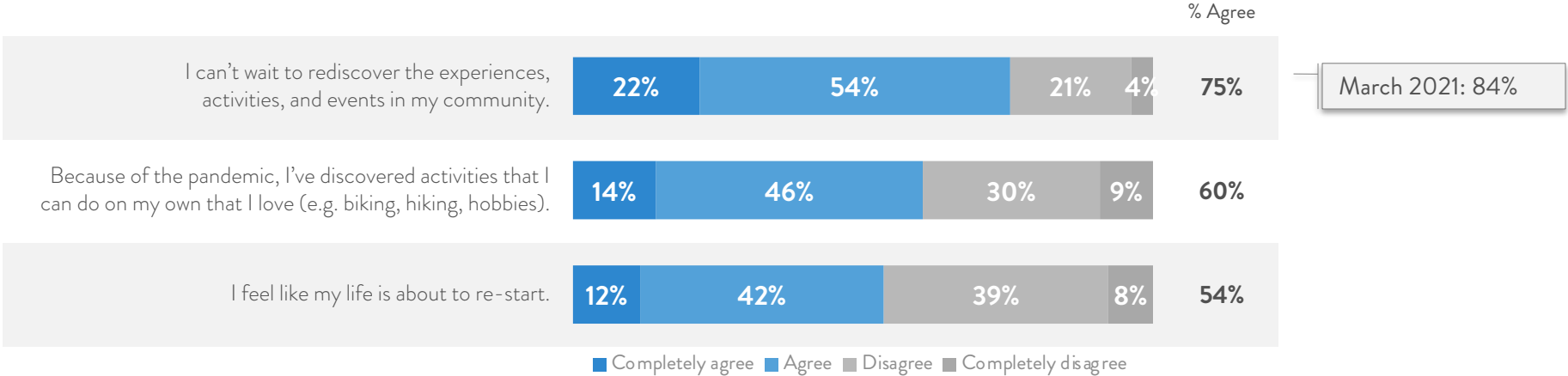


A large outdoor event, possibly a car show or festival, is taking place in a grassy field. In the background, a large billboard is mounted on a metal frame. The billboard features the text "Tune your radio to 89.5 FM" in white on a dark background. Below this, it says "GROWER YOUR CITY" and "curpocity" in a stylized font. To the right of the billboard, there is a logo for "YYC" and "FOOTSTOCK". The foreground is filled with numerous cars parked in rows. A dark blue pickup truck with a license plate "SAU-914" is prominent in the center. To its right, a silver Ford SUV is parked. In the distance, a residential neighborhood with houses and trees is visible under a cloudy sky.

Consideration for engagement and barriers to address

There will be a balance between rediscovering old and continuing new

The desire to rediscover is still strong but with many Albertans finding new self-directed activities over the past year, the landscape of things people can choose to do is much different (and more vast than before). The task facing organizations is to break through and remind Albertans why their offer is a compelling choice.

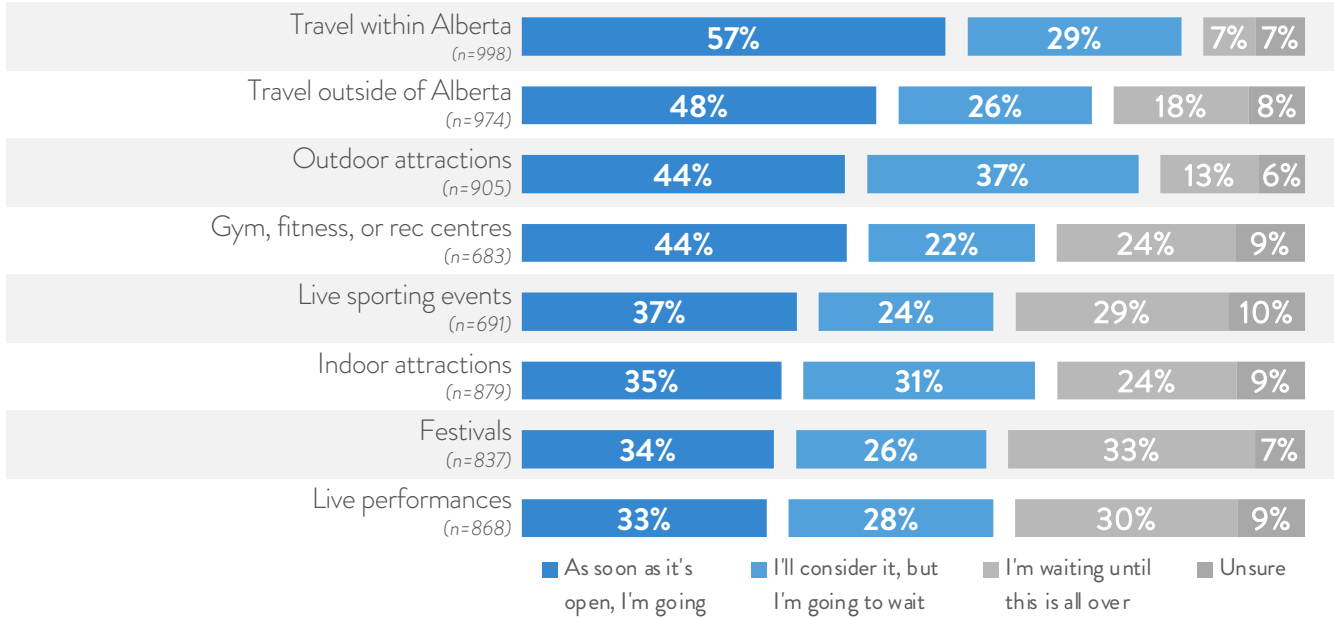


Below are a few things people might say about the current situation and how they spend their time. Please tell us if you agree or disagree with each one.
Base: Main sample (n=1034)

Pent-up demand is highest for travel but starts close to home

The greatest consideration for Albertans is with respect to travel– an activity that has seen some of the most stringent restrictions. More Albertans are indicating a preference to start travelling close to home (reflecting industry predictions) before elsewhere. Outdoor events/activities also lend themselves to higher consideration levels, likely due to comfort.

% Consideration (Among those who participate)



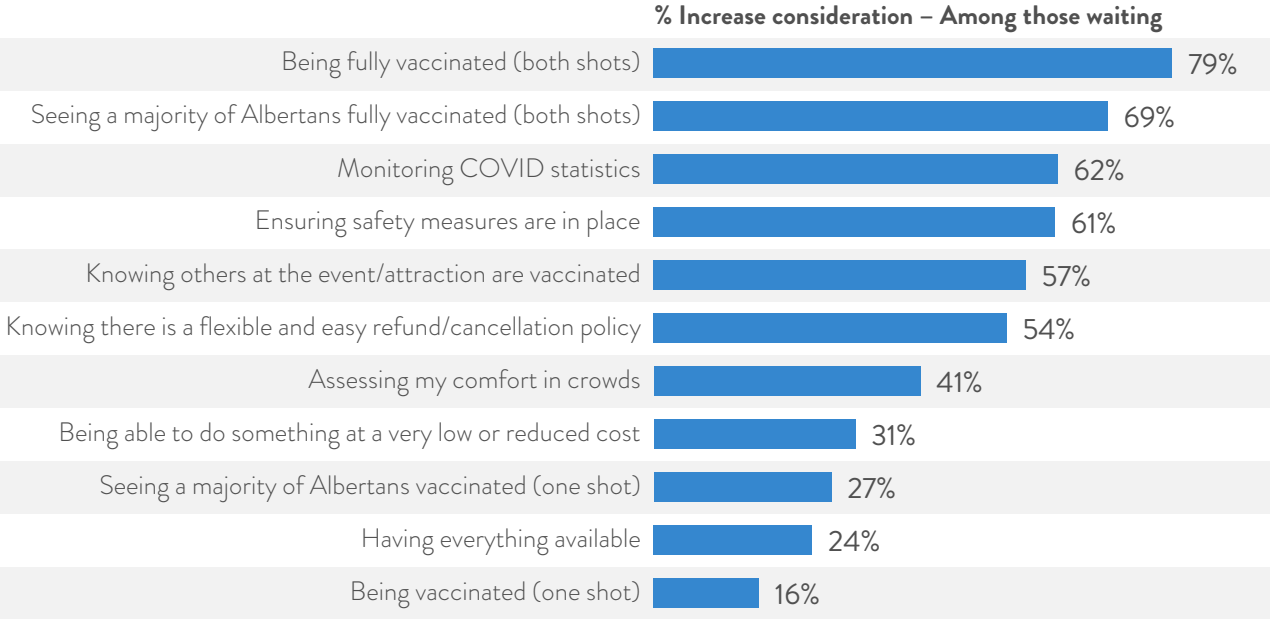
Specifically in Calgary...
The Calgary Stampede and Folk Festival have the lowest consideration (28% and 25% respectively), with the majority of Calgarians waiting until this is all over or showing uncertainty about making a decision to participate.

Thinking about the activities that you normally enjoy, assuming restrictions are coming off as planned and some health measures or safety measures will be in place, when will you consider doing those activities again?

Base: Main sample, those interested in each activity (n varies)

What do cautious Albertans need to see to increase participation?

The need to monitor statistics (vaccine levels, caseloads) is still most important to enhance consideration. However, messaging that communicates safety and flexibility remains important and organizations will likely need to build these messages into long-term communication plans and programming to reflect a new set of consumer expectations.



Pandemic statistics can guide organizations' expectations for increased engagement.

Safety measures, communication, and organizational transparency remain important.

But consideration by activity shows how measures apply in different ways

Those who are considering (but still waiting to) travel require the most measures in place collectively (indoor activities are similar). Having everything available is more important for activities viewed as one-time events (e.g. a sporting event or festival) compared to what could be considered a recurring activity (e.g. the Zoo).

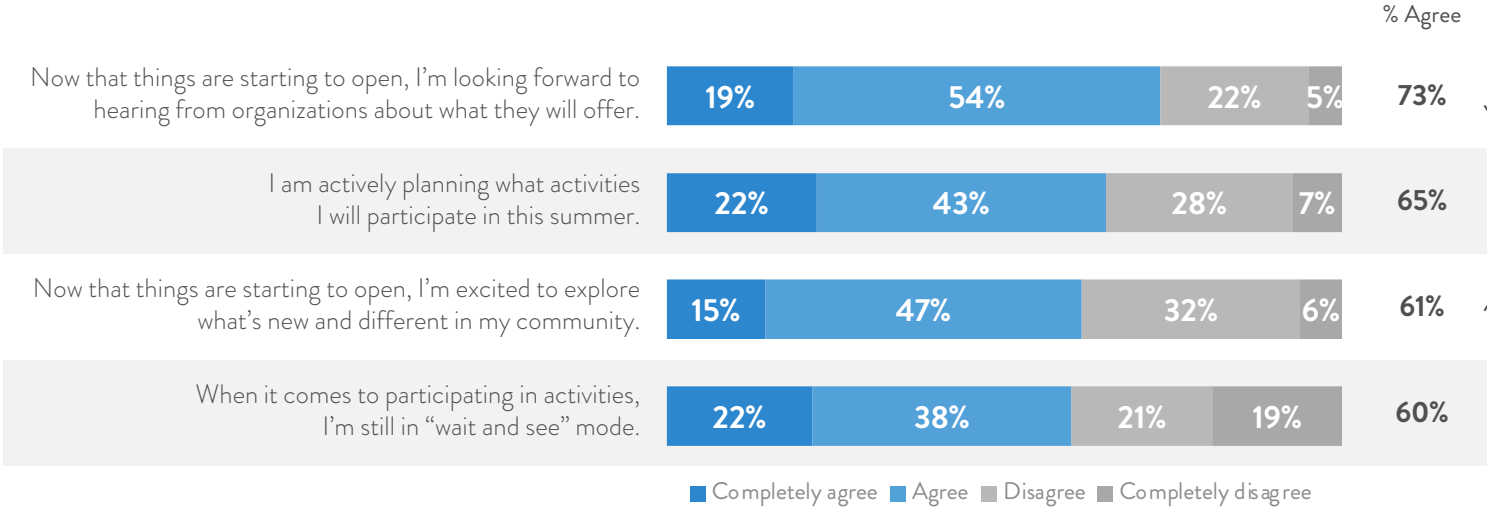
% Increase consideration – Among those waiting	Travel within AB	Travel outside AB	Outdoor attractions	Gym, fitness, rec.	Live sporting events	Indoor Attractions	Festivals	Live performances
Being fully vaccinated (both shots)	90% ↑	86% ↑	86% ↑	82%	81%	84% ↑	78%	81%
Seeing a majority of Albertans fully vaccinated (both shots)	83% ↑	74%	74% ↑	73%	65%	71%	64%	68%
Monitoring COVID statistics	71% ↑	66%	66%	66%	61%	66%	60%	62%
Ensuring safety measures are in place	79% ↑	66%	71% ↑	68%	58%	65%	60%	60%
Knowing others at the event/attraction are vaccinated	70% ↑	60%	62% ↑	57%	58%	64% ↑	55%	58%
Knowing there is a flexible/easy refund/cancellation policy	53%	57%	58%	55%	62%	57%	60%	59%
Assessing my comfort in crowds	42%	44%	43%	42%	44%	47% ↑	43%	42%
Being able to do something at a very low or reduced cost	28%	26%	28%	30%	34%	31%	30%	33%
Seeing a majority of Albertans vaccinated (one shot)	23%	26%	27%	35%	33%	33% ↑	29%	29%
Having everything available	13% ↓	19%	19% ↓	22%	33% ↑	22%	32% ↑	27%
Being vaccinated (one shot)	12% ↓	15%	16%	19%	23% ↑	19%	15%	16%

You mentioned there are activities you will wait to do. Which of the following will increase your willingness to participate in events and activities?

Base: Main sample, considering but waiting for at least one activity (n=664)

Whether planning or waiting, Albertans still want to hear directly from organizations

Audiences will explore on their own, but organizations should be proactive with messaging and communications because a higher proportion are waiting to hear directly from organizations. This might reflect the larger proportion (60%) who are still in “wait and see” mode – there is a need to give them a compelling reason to engage.



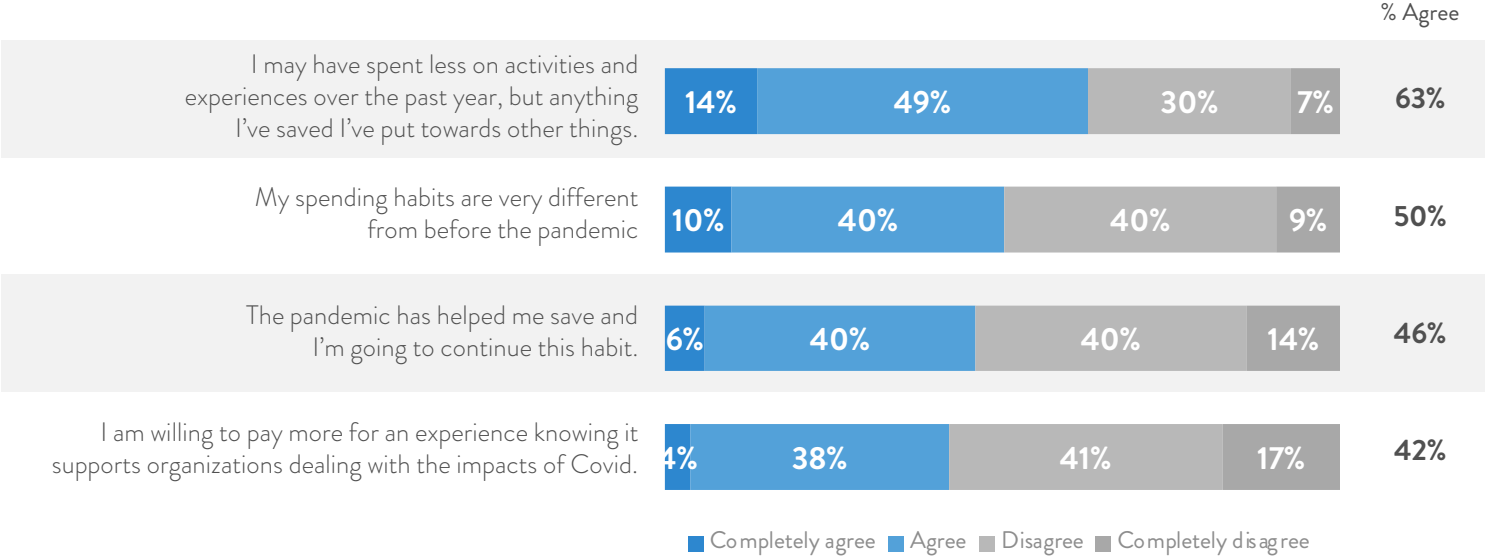
Passive vs. active?
More Albertans are looking to hear directly from organizations as opposed to seeking out or exploring on their own.

Spending habits and messaging opportunities



Albertans view money differently as spending habits have changed

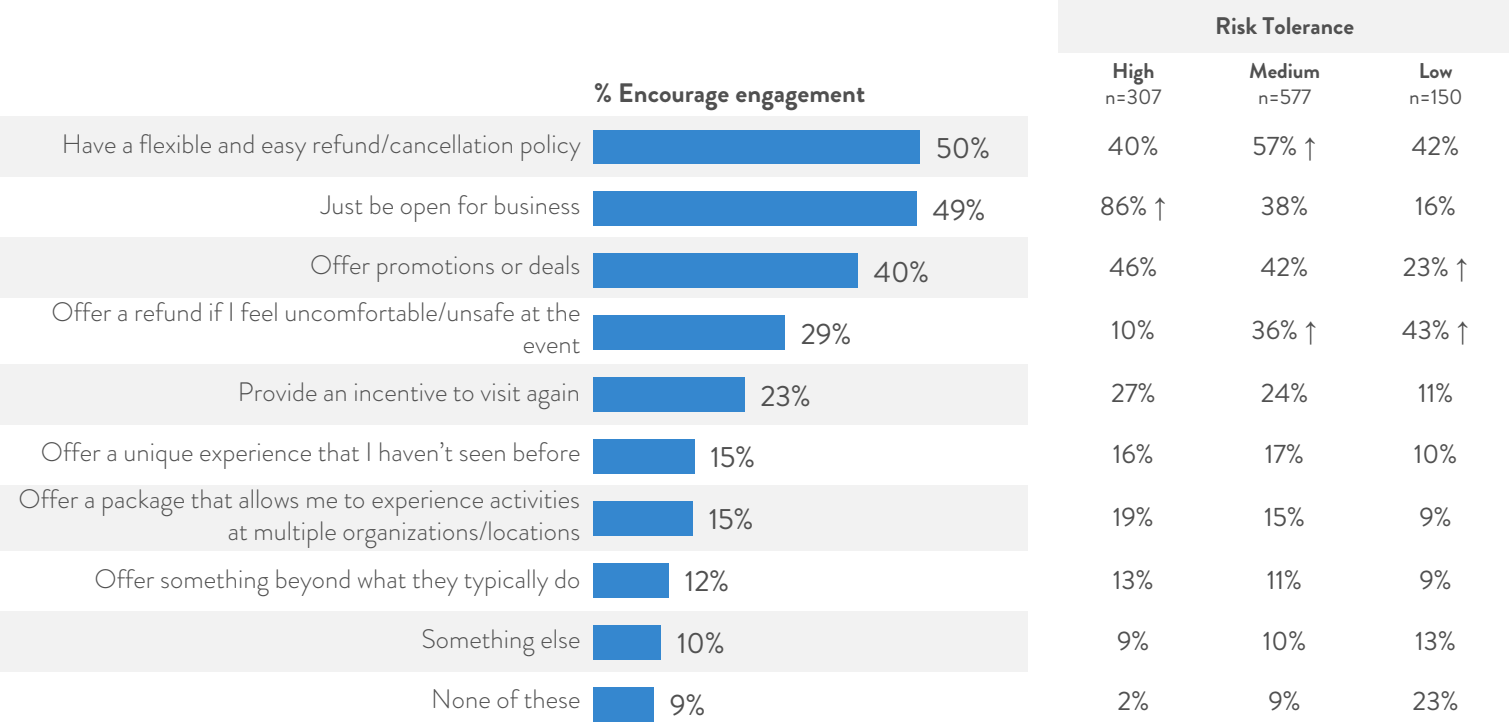
It is clear that spending habits have changed to some degree but what the means for organizations is uncertain. Nearly two thirds indicated that they have spent less on activities but in turn, they have redirected money (literature suggests a sharp rise in a variety of hobbies, household projects, etc. that will have claimed a share of this spend). As such, expectations from organizations should be muted with respect to how Albertans will spend, at least in the short term.



Below are a few things people might say about the current situation and their spending habits in the midst of the past year. Please tell us if you agree or disagree with each one.
Base: Main sample (n=1034)

Communication, flexibility, and promotions will encourage participation

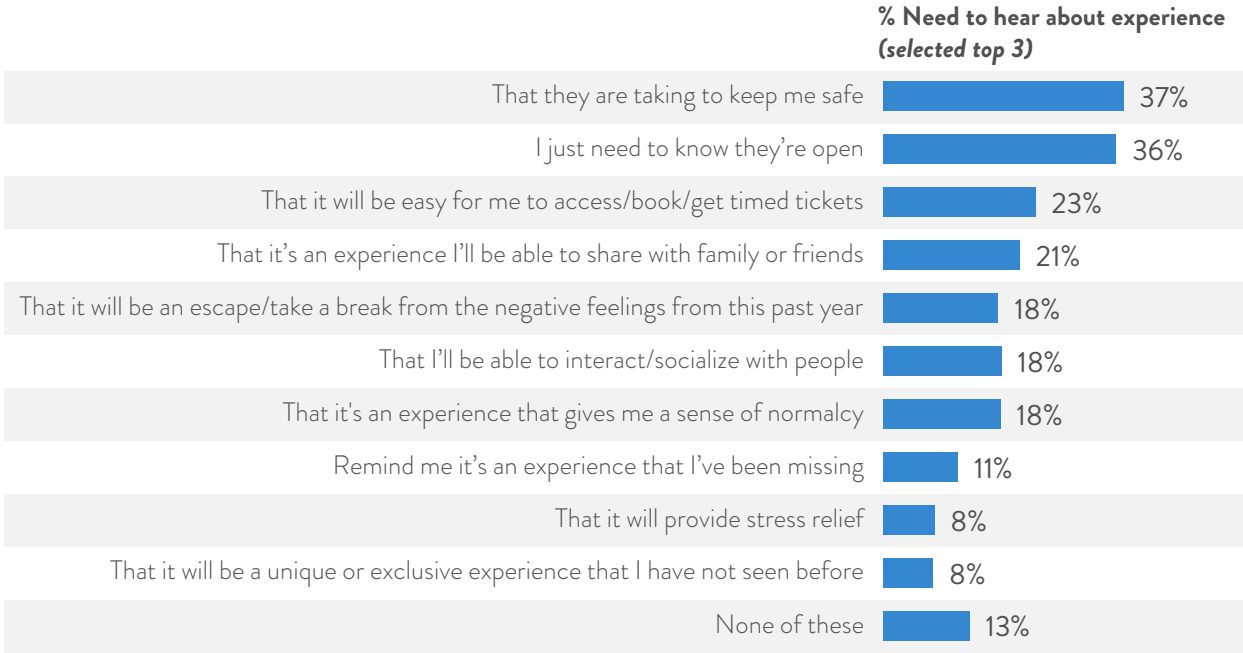
The pandemic has already made clear that the expectations Albertans have from organizations have shifted in new ways. Reinforcing transparency, including reassurances about flexibility, coupled with incentives are going to be necessary to help Albertans select where they want to spend their money.



What, if anything, could an organization do to encourage you to attend live and in-person, and spend money with them? Please select all that apply.
Base: Main sample (n=1034)

But safety remains a key message

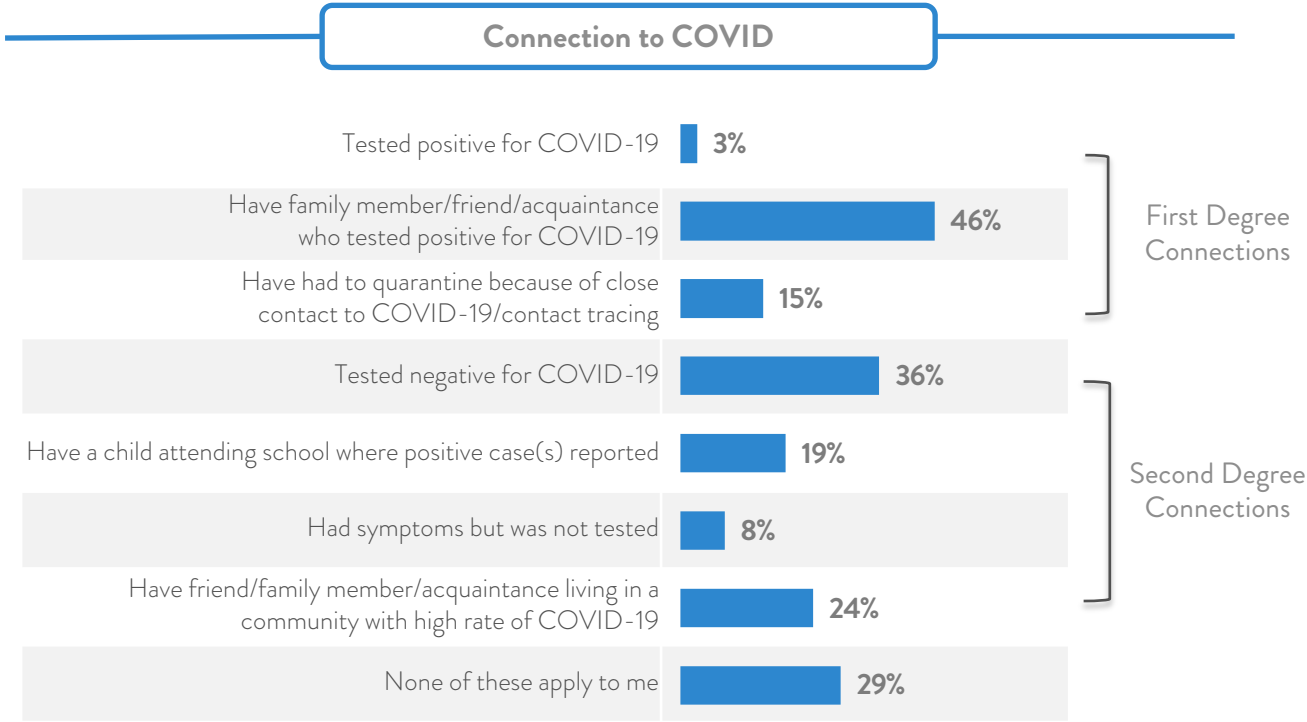
Because consumer expectations have changed, so too should messaging. Communications focused on ease, safety, spending time with others, an escape or feeling normal will resonate more strongly than message about unique experiences (at least for now). Albertans are craving comfort and stability over other elements.



Respondent Profile

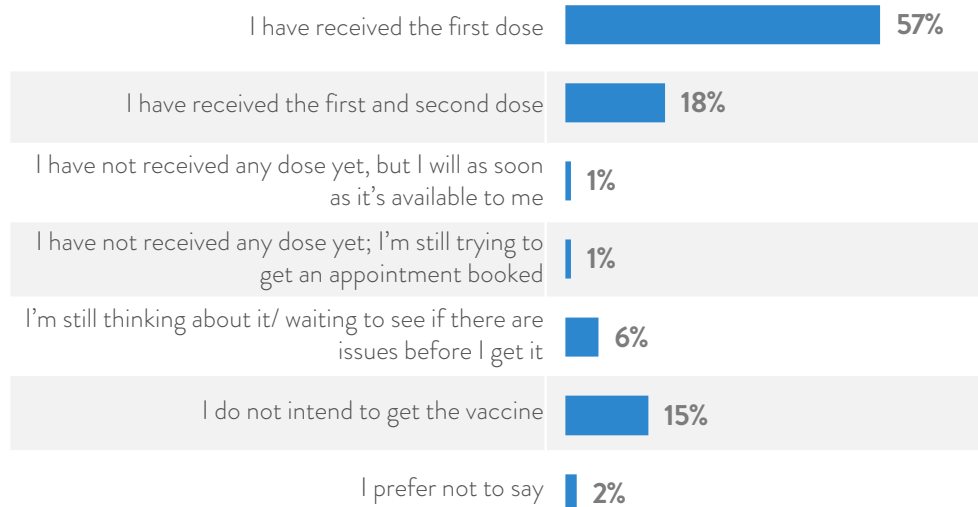


Profile of Key Characteristics:



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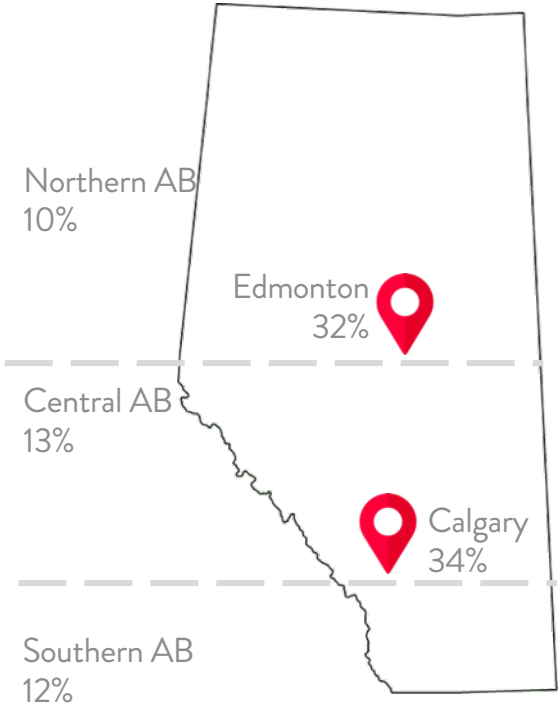
Vaccination Status



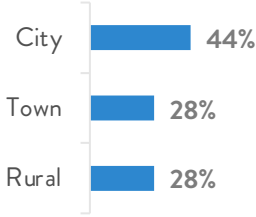
Who we heard from

Region

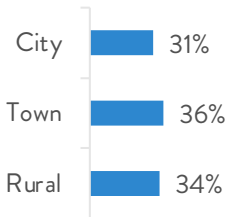
Community Type



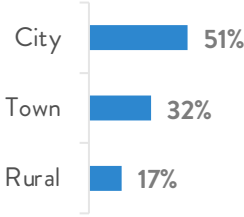
Northern AB



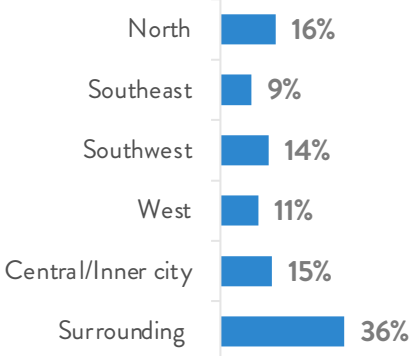
Central AB



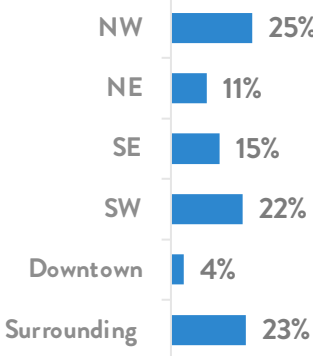
Southern AB



Edmonton



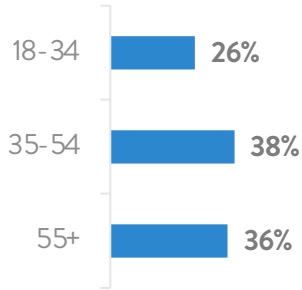
Calgary



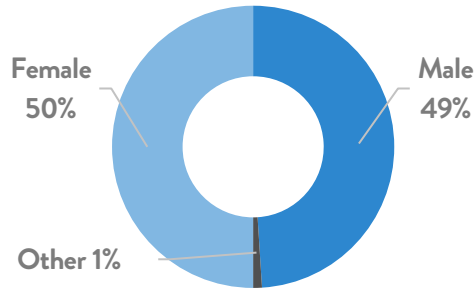
Base: Main sample (n=1034). Note: Calgary + Edmonton include supplemental sample

Who we heard from

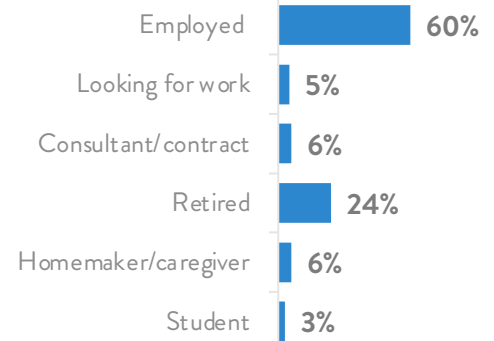
Age



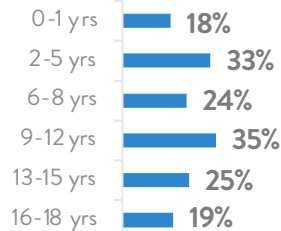
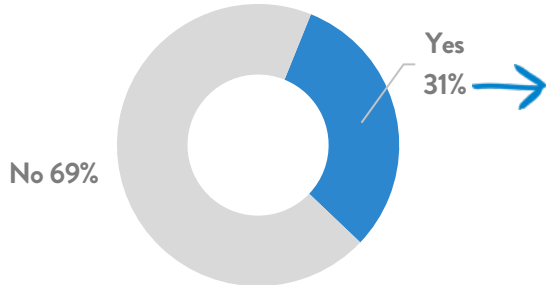
Gender



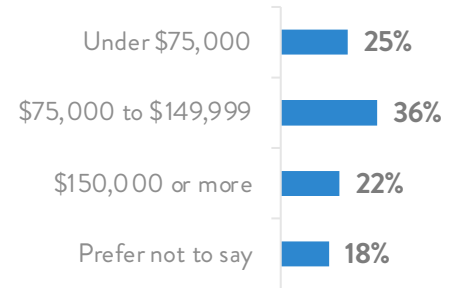
Employment



Children in the Household



Household Income



**Stone —
Olafson**

Understanding people. It's what we do.