

The NEW Experience Economy:

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

Wave 1 Results: Edmonton
June 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 purpose of the work is to provide relevant facts about local audiences that organizations who offer live group experiences can use to breath life back into our communities.



Details on Wave 1:

- Online survey, Albertans 18+
- Respondents were recruited through Angus Reid Forum.
- Field dates: May 21 - June 2, 2020
- Quotas set regionally, final data was weighted within Edmonton by age and gender.
- A total of 1,348 surveys collected with Albertans. Within that sample, 497 Edmonton-only surveys were collected:
 - 334 base surveys (within main sample)
 - 163 booster surveys

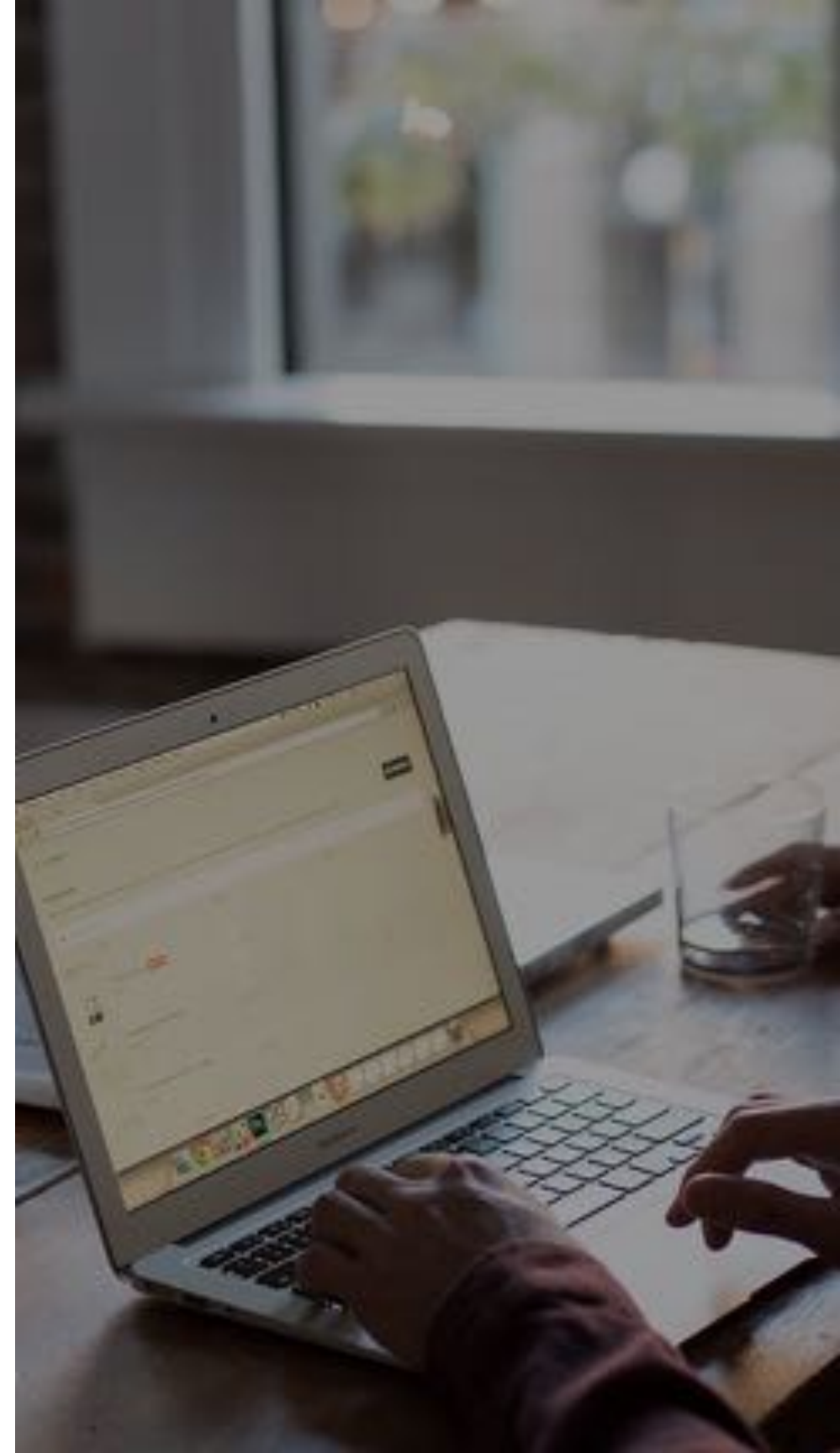
How to use this report:

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

Please note: Due to the inclusion of online, non-random sampling, a standard margin of error is not calculated for the results. However, an approximate rate of reliability typically associated with an overall sample of 497 would be +/- 4.4%, 19 times out of 20.



What is different in Edmonton?

1.

Edmontonians show a greater interest in arts & culture than the provincial average

Edmontonians are more likely to attend festivals, specifically cultural/heritage and music festivals. They also have higher attendance for live performances such as concerts, theatre, and comedy. They participate in more activities overall, slightly greater than Calgarians.

2.

Motivations remain consistent

Throughout the province, motivation to connect with the experience economy are the same – social, experiential, and health. Edmonton organizations need to leverage these to re-connect and remain relevant.

3.

Yet hesitation to re-connect is high with Edmontonians

The serious impact of COVID-19 is felt in Edmonton more than the rest of the province and a larger proportion of Edmontonians have avoided activities. Comfort level plays a crucial role for Edmonton organizations looking to re-connect with their audiences.

An aerial, top-down view of a large stadium, likely a soccer stadium, showing the tiered seating areas and the central field. The image is dark and semi-transparent, serving as a background for the text.

Understanding Behaviours

Engagement takes many forms and crosses sectors

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



OBSERVE

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



ATTEND

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

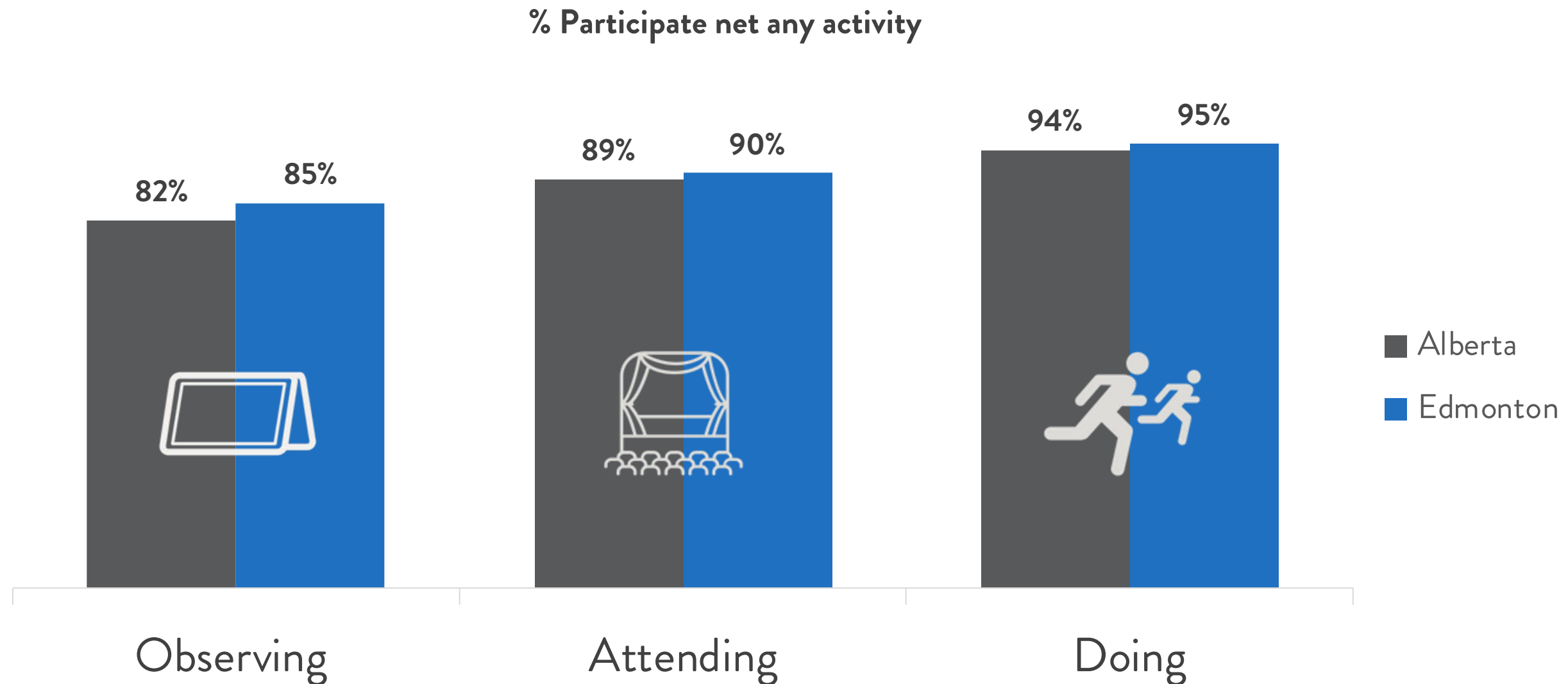


DO

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

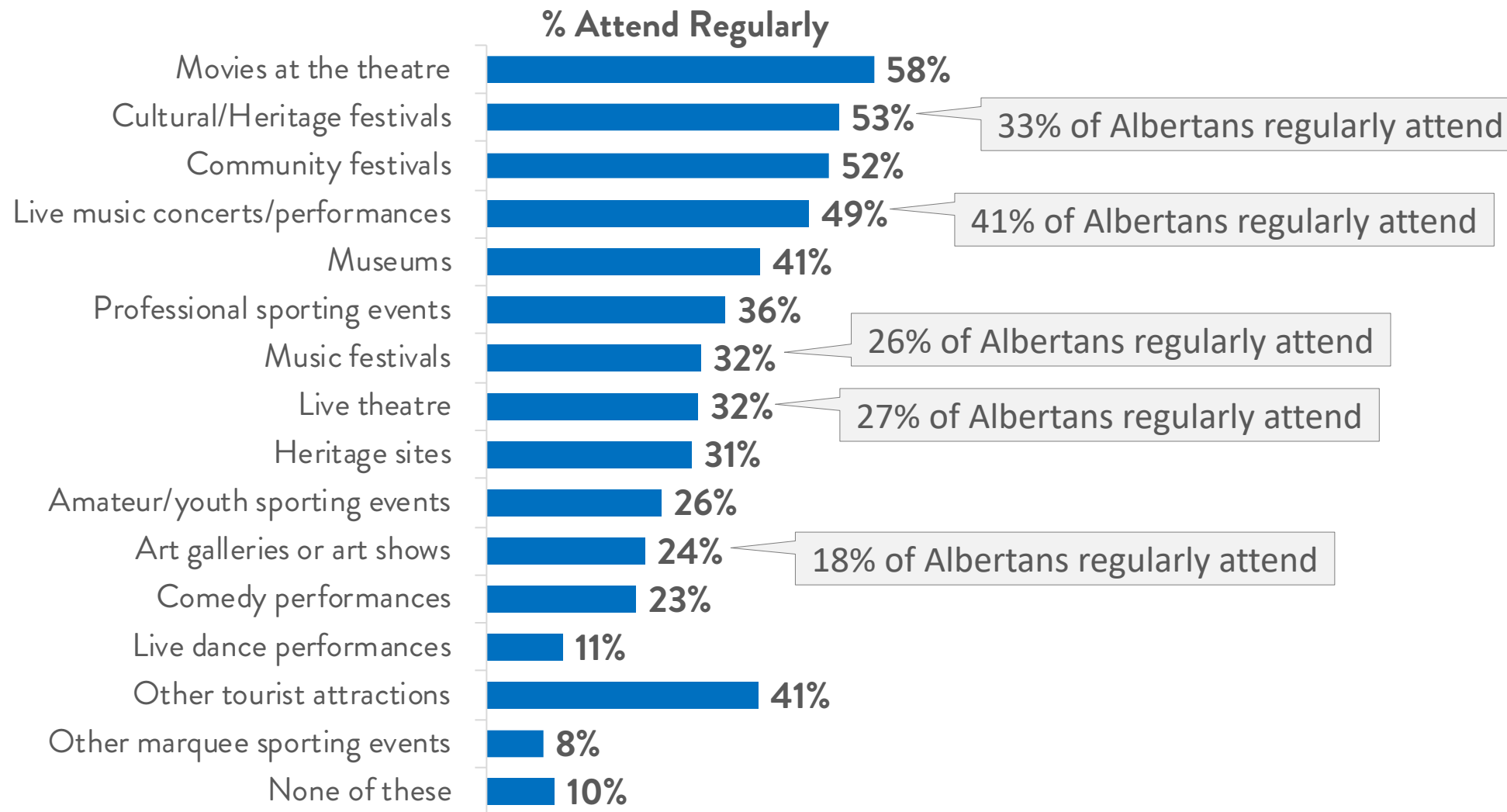
What do participation patterns look like for Edmontonians?

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



What do Edmontonians Attend?

Compared to the rest of the province, Edmontonians have higher attendance at festivals and live performances, as well as other art & culture activities, which drives overall overall attendance numbers. **The average Edmontonian attends 5.2 events (provincial average is 4.0 and Calgary average is 4.7)**



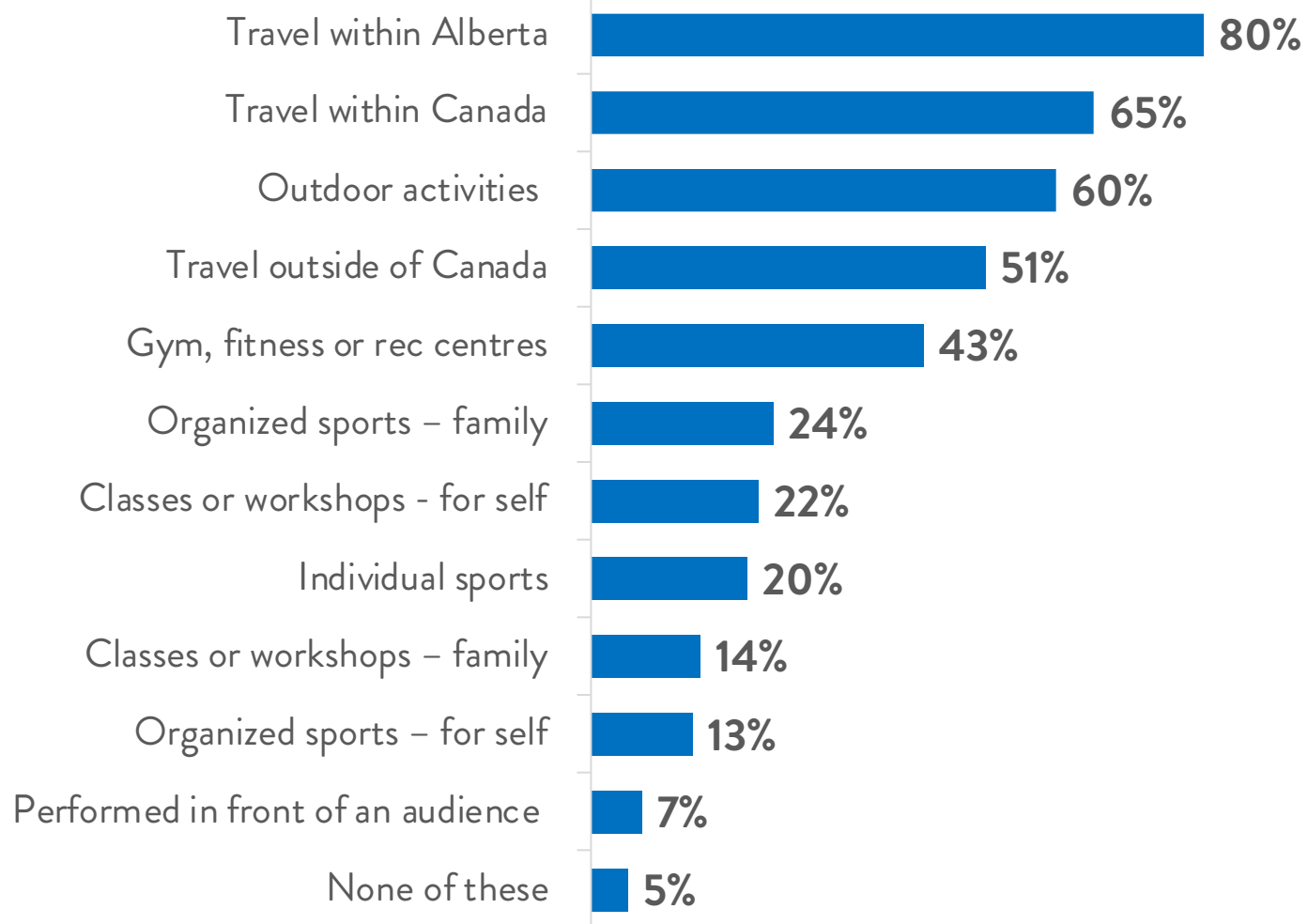
Q9. Prior to the COVID-19 pandemic, please indicate which of the following you used to attend on a regular basis?

Base: Edmonton sample (n=497)

How do they Participate Firsthand?

Edmontonians have very similar participation habits to the rest of the province.

% Participated in Regularly (Doing)



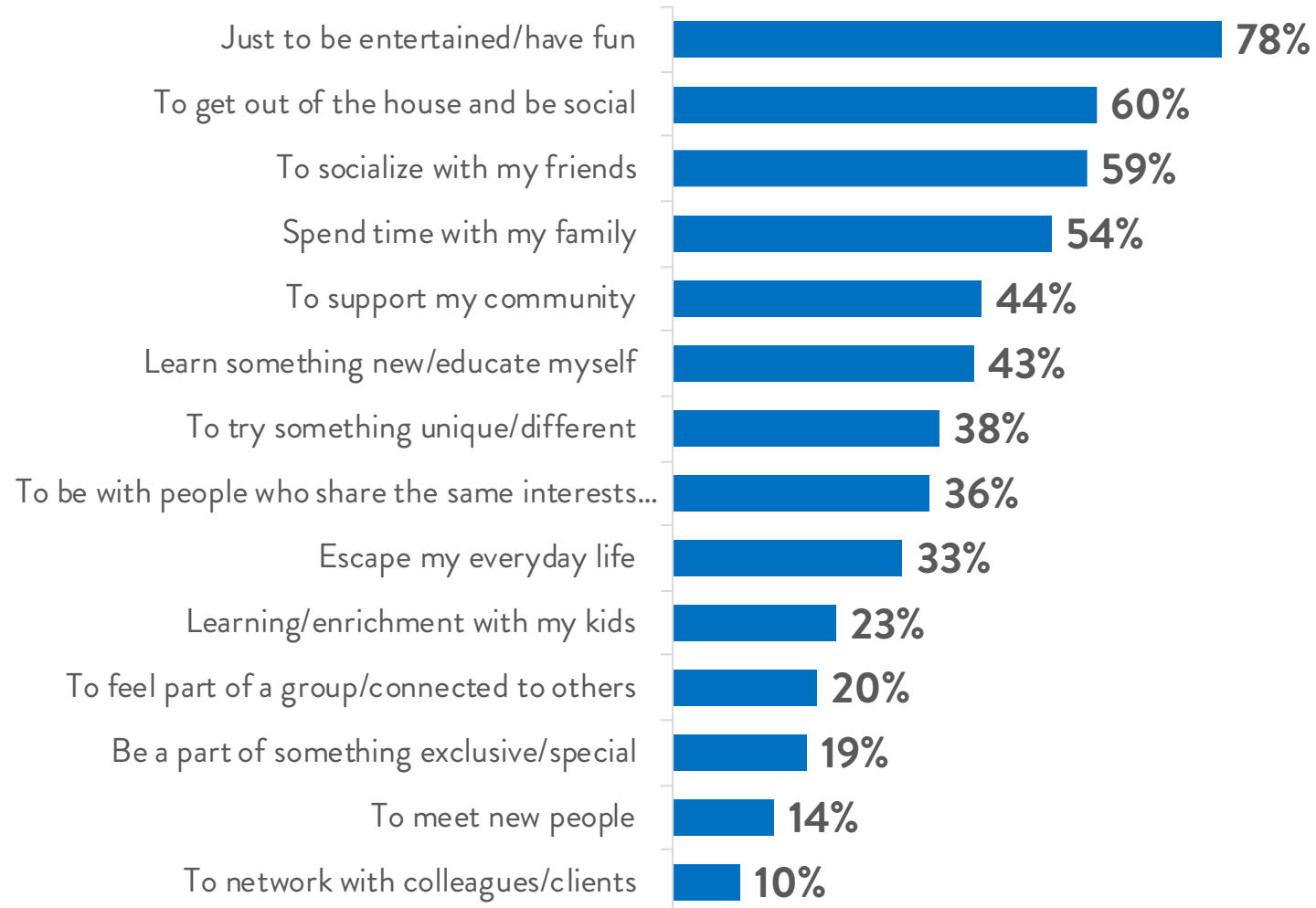
Q11. And, prior to the COVID-19 pandemic, please indicate which of the following you used to participate in on a regular basis?

Base: Edmonton sample (n=497)

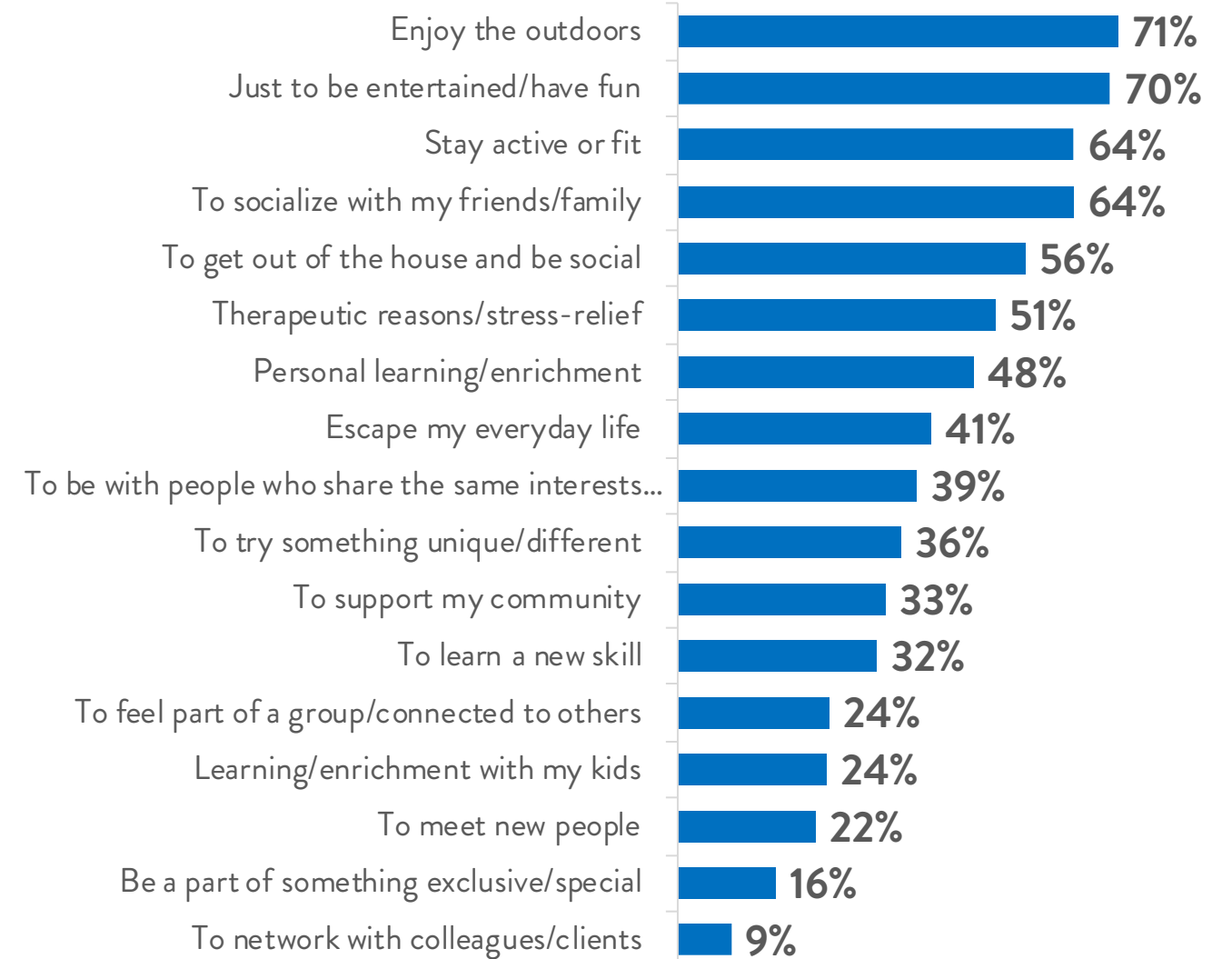
The core benefits for activities hold across regions: entertainment, socialization and health

These motivations will be a key factor when it comes to re-engaging your audiences.

% Reasons for Attendance



% Reasons for Doing



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

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

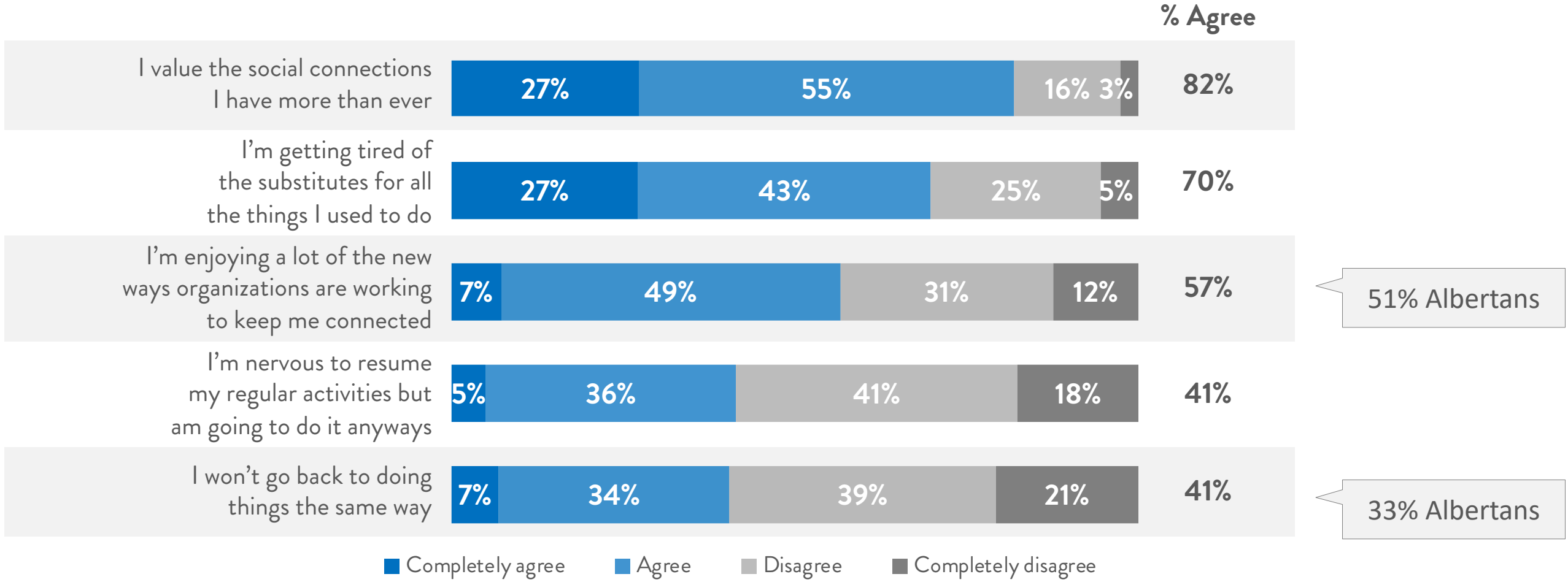
Base: Edmonton sample/attended or participated in activity

A person wearing a blue ribbed sweater is shown from the side, performing a yoga or stretching pose on a blue mat. The person's right arm is extended downwards, and their left hand is resting on their right knee. The background is a blurred indoor setting with a wooden floor and a framed picture on the wall.

Engagement and Substitution Activities

Similar to Albertans, Edmontonians are growing tired of the substitutes for experiences and missing social connections.

However, Edmontonians are slightly more likely to be enjoying the substitutes and also agree that they won't be doing things the same way again.

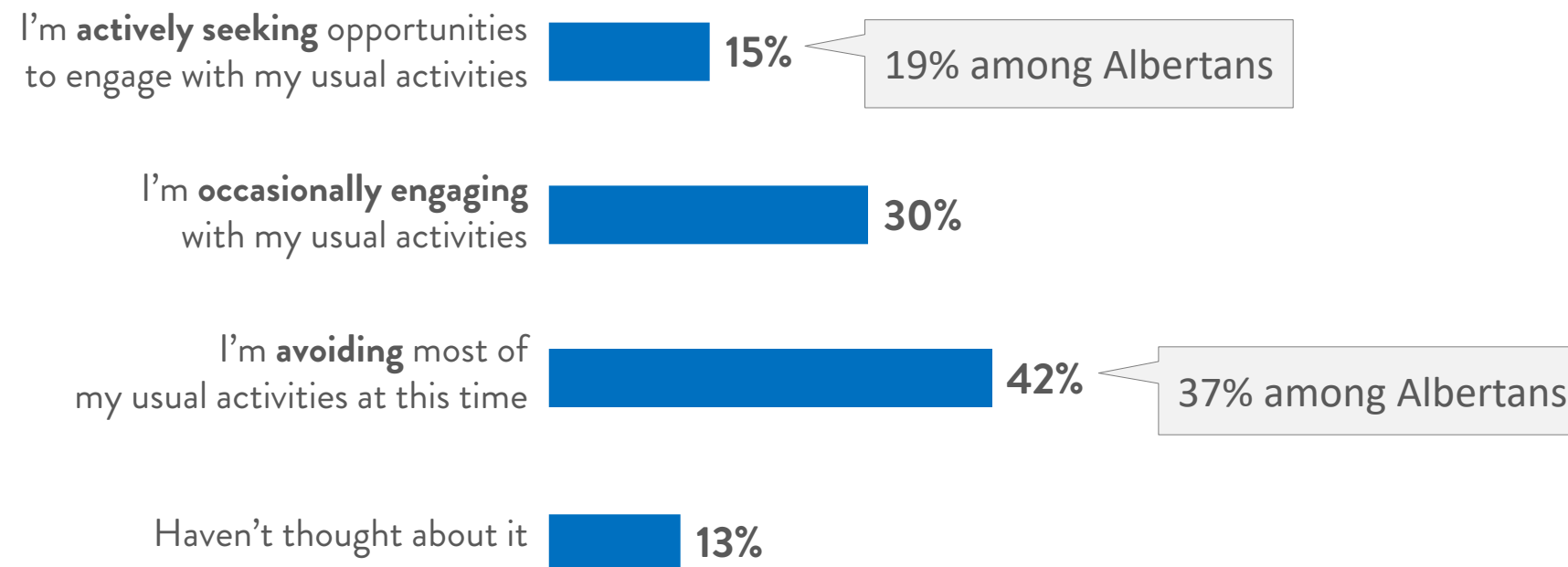


Q16. Now that we've asked you about the ways you have been connecting with organizations and activities throughout restrictions, we'd like to understand how you feel at this time. Please indicate your level of agreement with the following statements.

Base: Edmonton sample (n=497)

Edmontonians are avoiding their usual activities and not actively seeking opportunities to engage compared to the rest of Alberta.

Not surprisingly, those who would like the city to re-open faster or who have a higher comfort level for interaction with others are actively seeking out engagement.



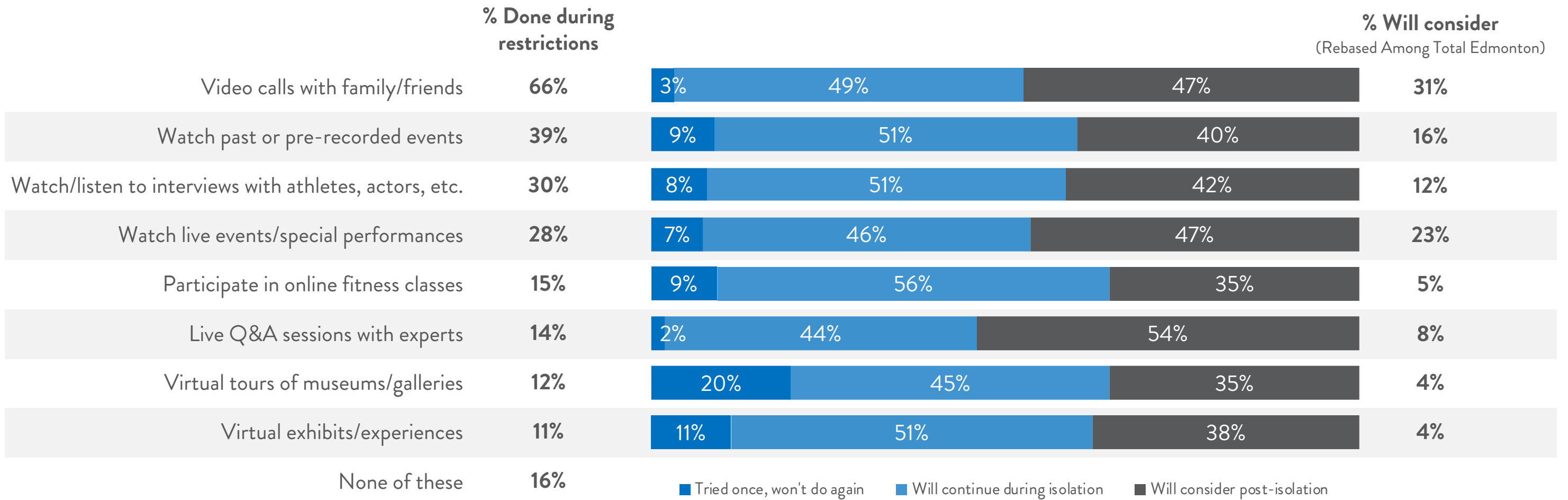
Q13. Since restrictions on gatherings in Alberta were implemented in mid-March, organizations have been trying to engage with audiences, primarily through digital channels. Which statement best describes how you are connecting with some of your normal activities?

Base: Edmonton sample (n=497)

What engagement activities are working for Edmontonians?

Among all activities, Edmontonians are participating in a similar way to Albertans.

For all activities, there is a mix of what will be continued during isolation periods and what Edmontonians will consider post-isolation.



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

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

Base (Q14): Edmonton sample (n=497); Base (Q15): Have participated in activity (n=varies)

How comfortable are Edmontonians?

Do Your Part While Enjoying
Our Parks

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



• Avoid group gatherings

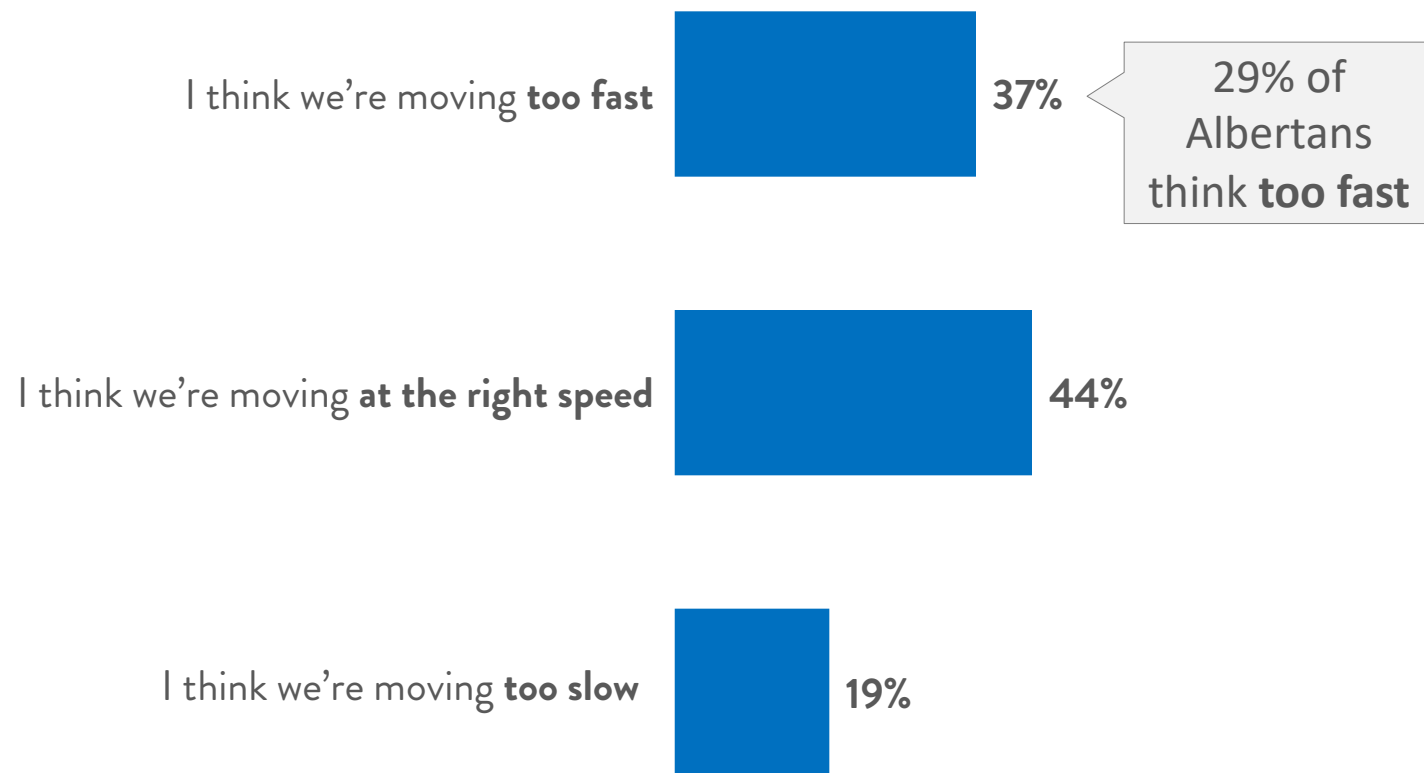
• Keep hands clean



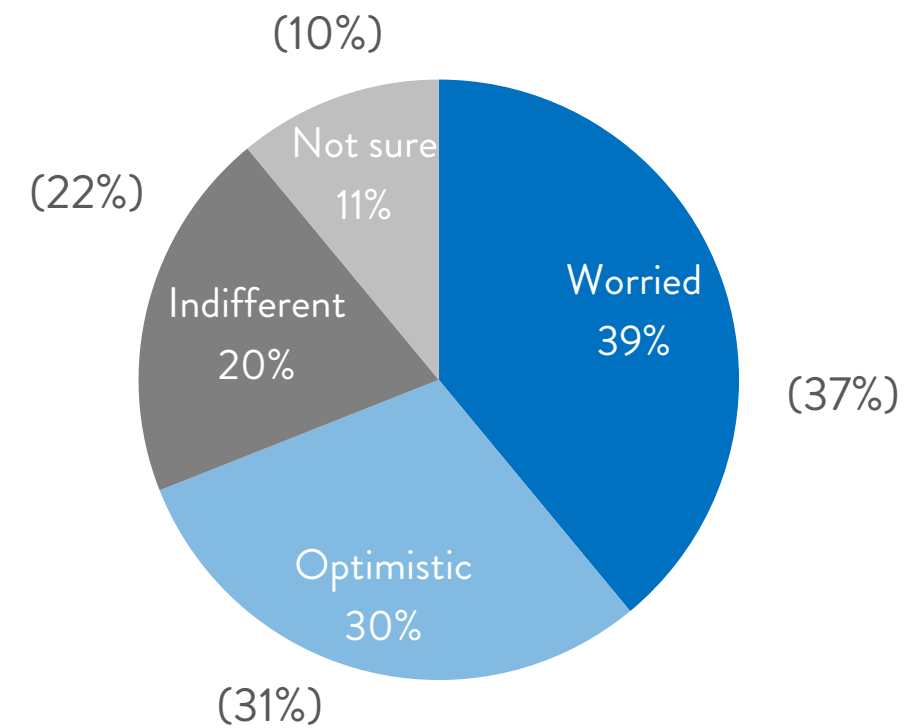
• Use disinfectant wipes when
touching public equipment in
playgrounds and courts

Edmontonians show hesitation towards re-opening with a larger population who think their city is re-opening too fast.

Opinion on Re-opening



% Current State of Mind
(Provincial % in brackets)

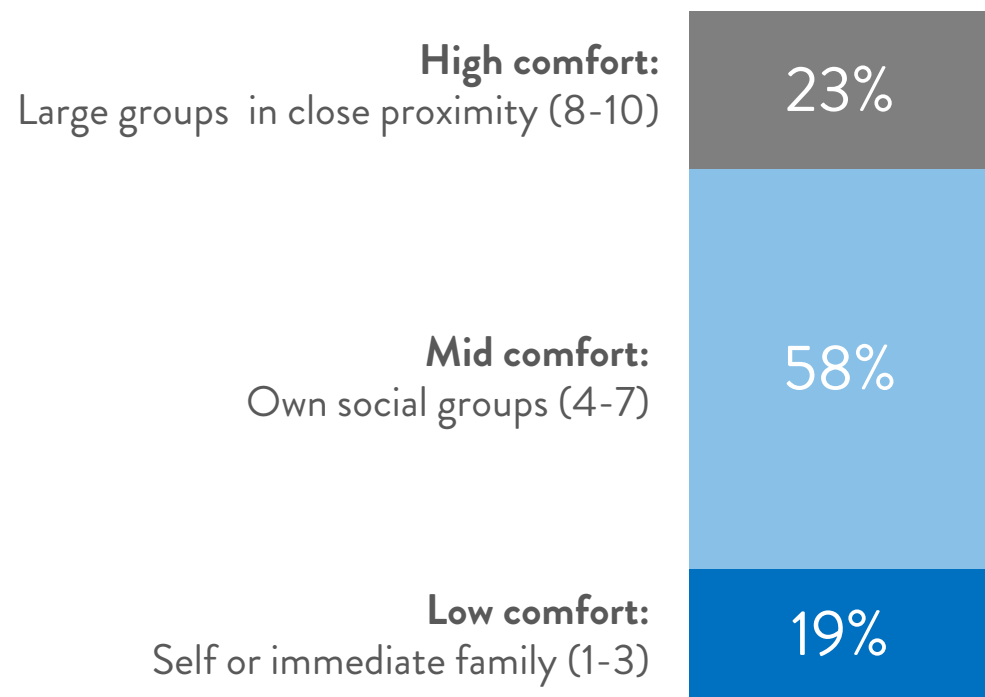


Q17. Which statement best reflects your personal opinion on the current state of re-opening in Alberta?
 Q22. Given everything that is happening in Alberta, which of the following best describes how you are feeling today?
 Base: Edmonton sample (n=497)

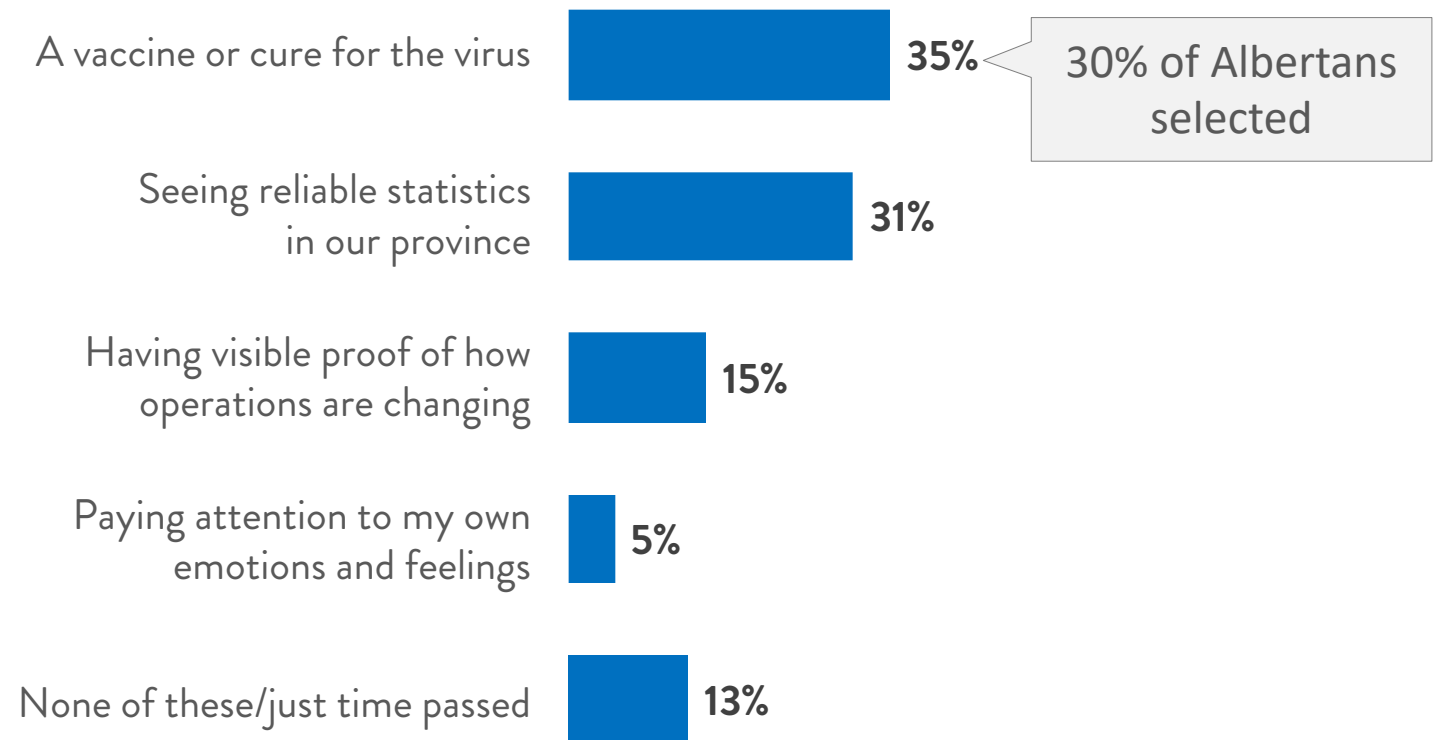
Like the rest of Albertans, Edmontonians are most comfortable with immediate social circles or family.

City centres, like Edmonton and Calgary, place slightly more importance on a having a vaccine in order to feel comfortable.

% Comfort level – Interacting with Others



% Most important to increase comfort



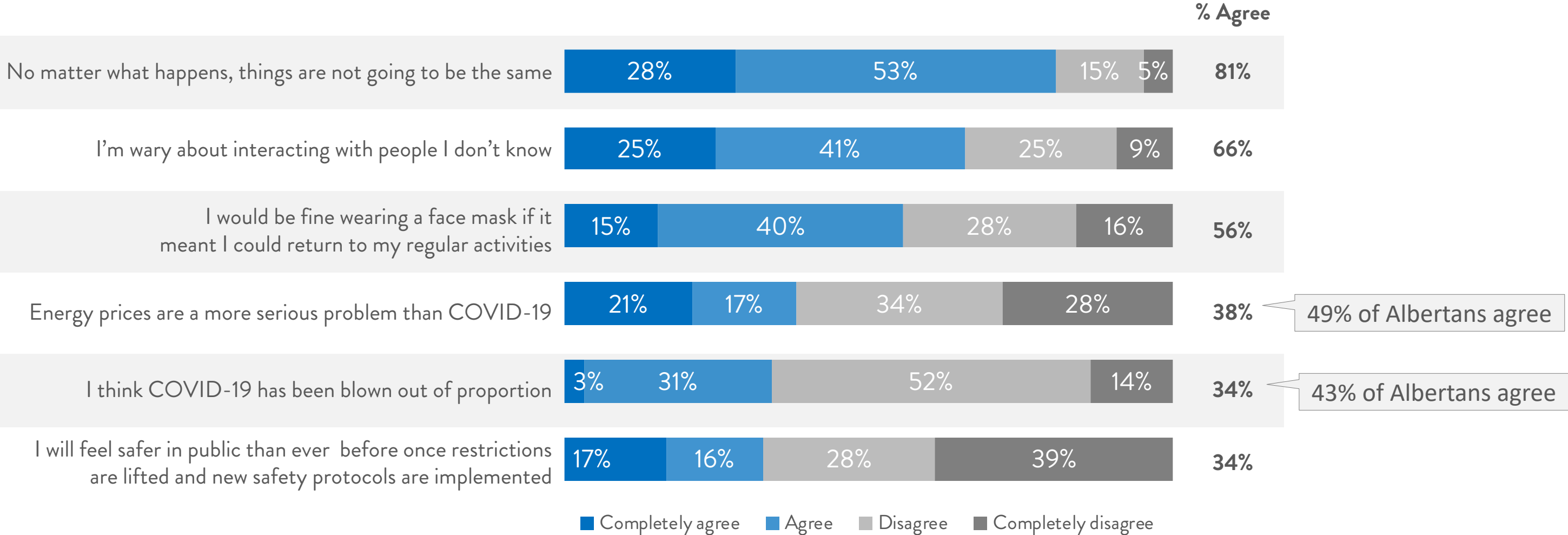
Q18. As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community?

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

Base: Edmonton sample (n=497)

There is a stark difference between Edmontonians and Albertans when it comes to energy prices – they see COVID-19 as a more serious problem than energy.

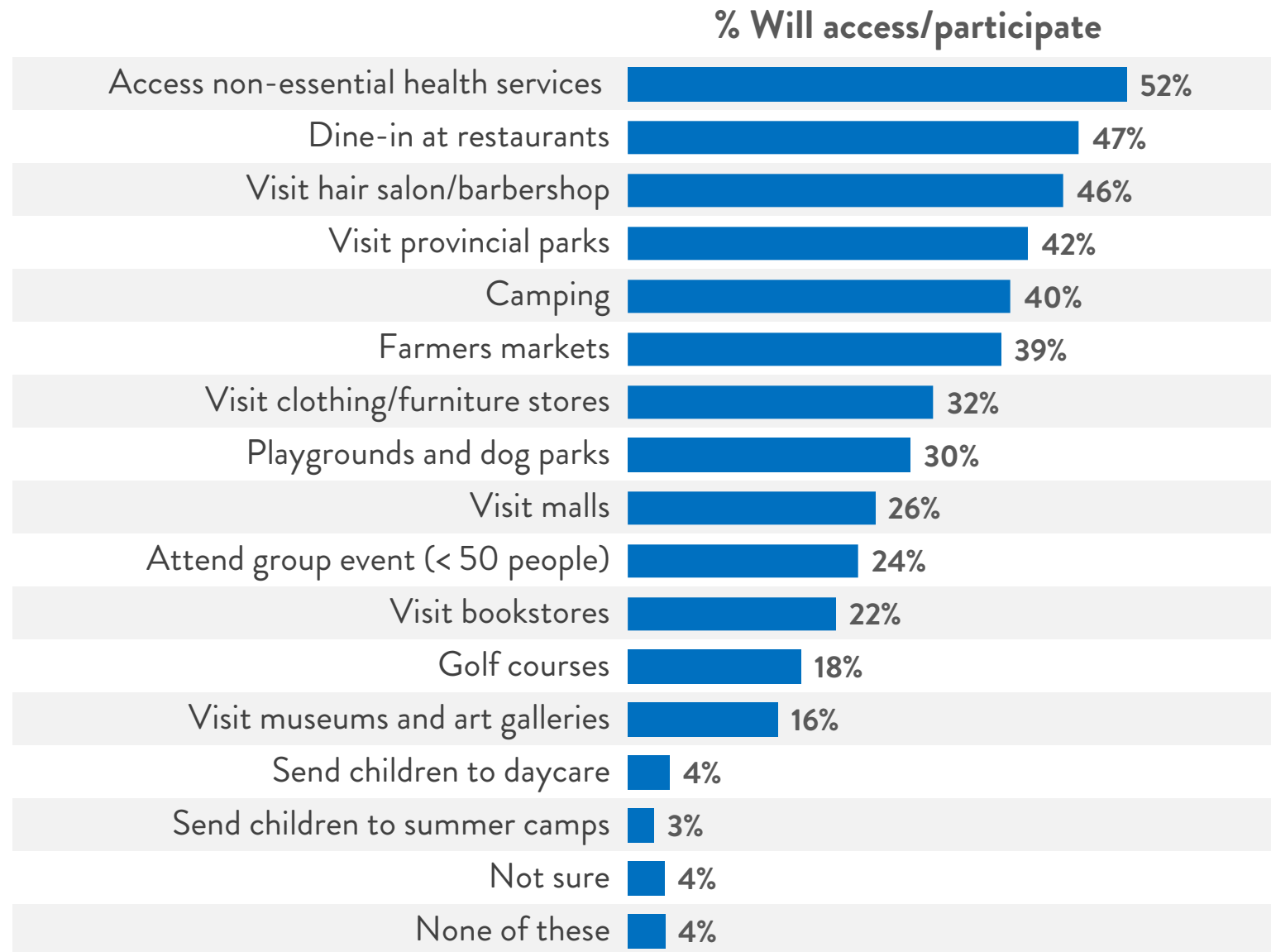
While their feelings towards going back to normalcy and comfort with strangers is similar to all of Albertans, Edmontonians are less likely to agree than COVID-19 has been blown out of proportion.



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: Edmonton sample (n=497)

Similar services are sought after by Edmontonians as the rest of the province.



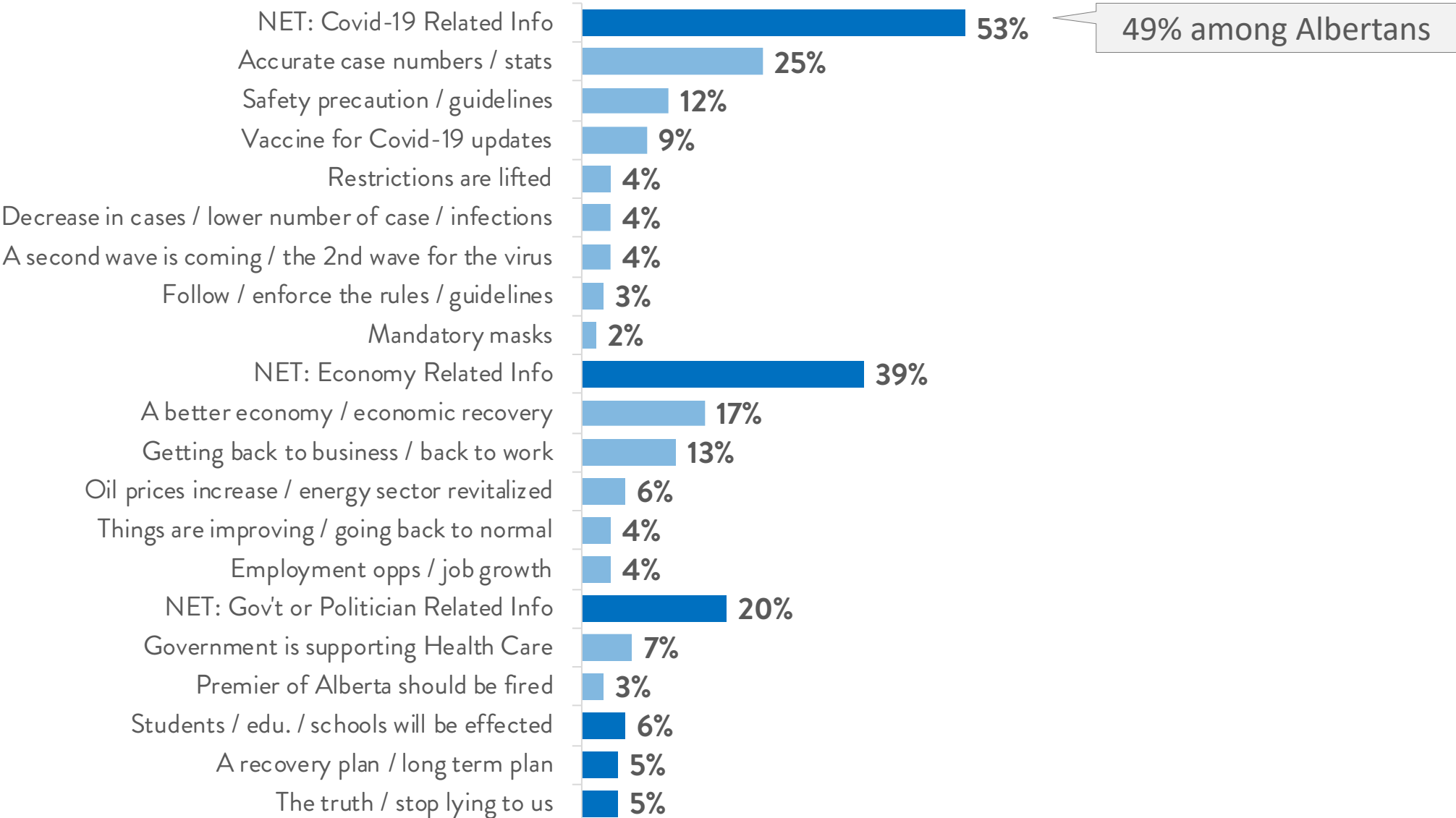
There are some small exceptions – Edmontonians are less likely to say they will visit a hair salon/barbershop (49%), visit provincial parks (49%), and go to farmers markets (42%). This reflects their hesitation to connect with regular activities.

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: Edmonton sample (n=497)

Information needs: COVID-19 specific information remains the top priority across the province, slightly more than the rest of Alberta.

% Responses – Information Needs



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 2% or greater included)

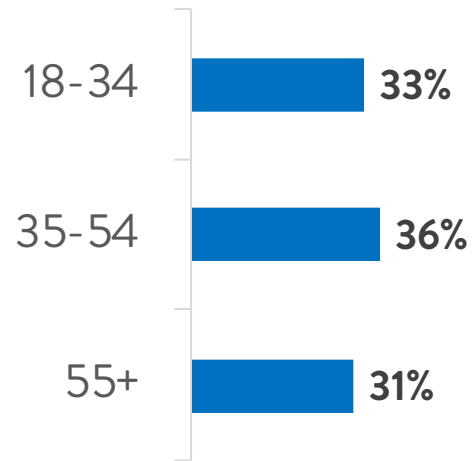
Base: Edmonton sample that provided response (n=392)



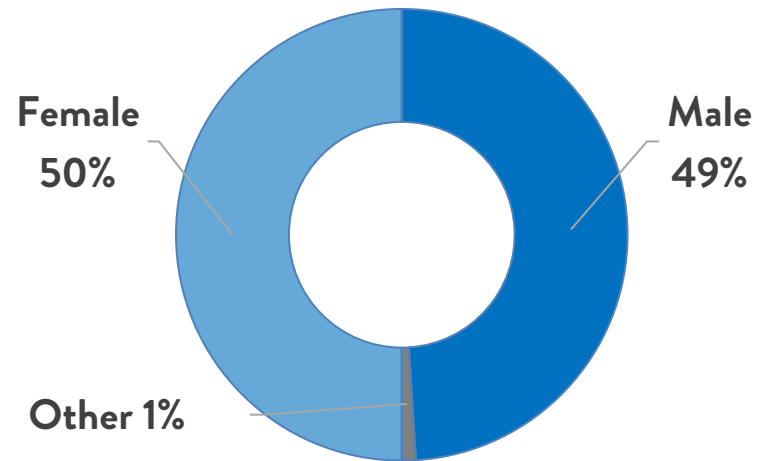
Respondent Profile

Who we heard from

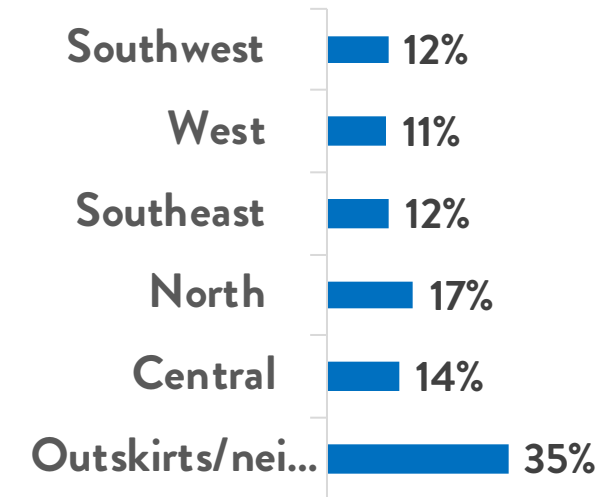
Age



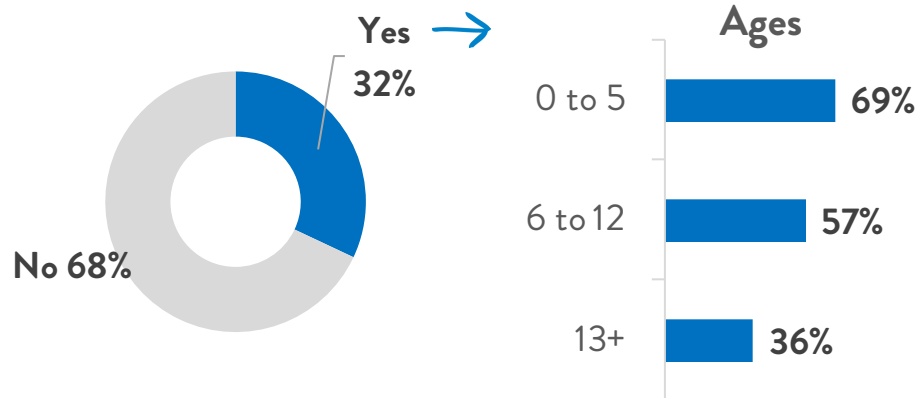
Gender



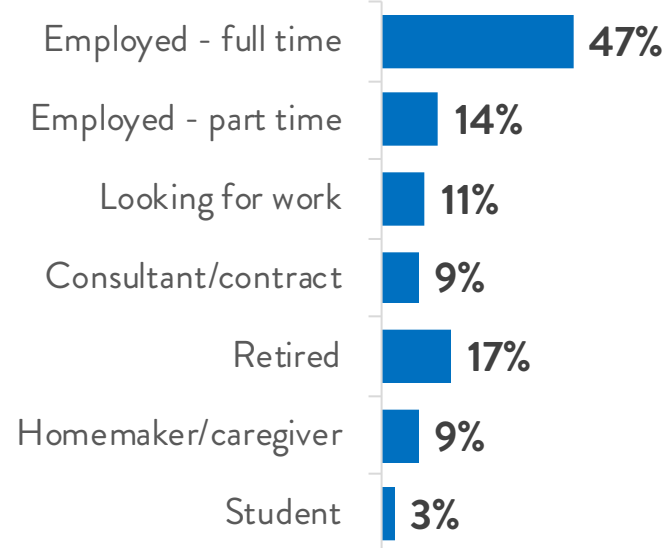
Location



Children in the Household



Employment



Household Income

