The NEW Experience Economy:

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

Wave 2 Results
August 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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Background & Purpose

Five months into a pandemic, our province is adapting to a new reality and organizations in the experience economy are grappling with how to adjust to current circumstances. This second wave of research builds on the baseline established in May and June by delving into attitudes on comfort, spending, the impact of media and audience expectations.

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 where we are right now and to start building recovery solutions that enable organizations in this important sector to adapt.

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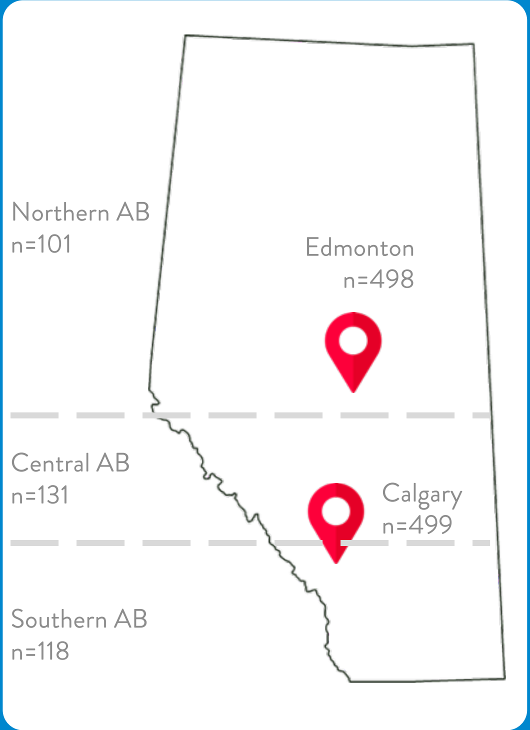
Overview of Research Process:

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 2. All waves will 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 1,346 Albertans participated in this second wave of research. Responses include 1,036 regionally balanced core sample, plus supplemental (booster) responses for Calgary and Edmonton.
- The longitudinal survey includes 85% of respondents retained from wave 1 (15% of respondents new for wave 2).
- Data collection occurred between July 8, 2020 and July 23, 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.

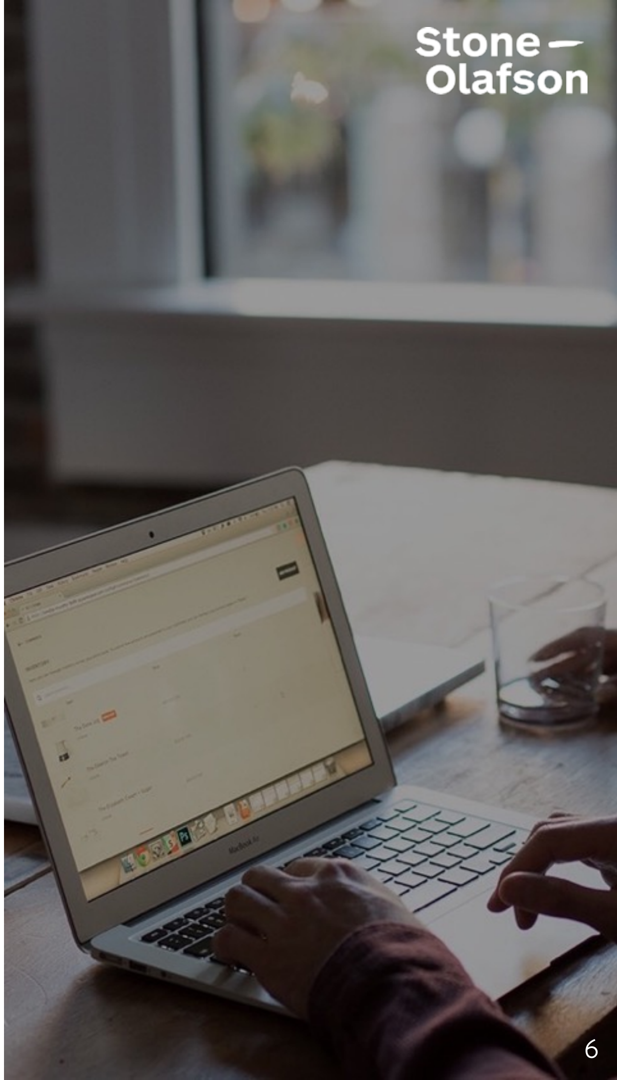


Additional Notes on Reading the Report

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.



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Mapping the progression of COVID-19 in Alberta

*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

Beginning June 5
Black Lives Matter protests and vigils

June 12
Relaunch Strategy Stage 2

June 15
Provincial state of emergency ended

June 30
Outdoor gathering increases to 200 people

July 11
Edmonton announced as a hub city for the NHL

July 14
Canada & US border closure extended through August 21st

July 21
Announced: **Schools scheduled to reopen** in the fall

August 1
Masks mandatory for indoor public spaces in Calgary and Edmonton

May | **June** | **July** | **August**

May 21 – June 2
Wave 1 survey in field

July 8 – July 23
Wave 2 survey in field

*Dates may vary by city

COVID Contexts: By the Numbers

COVID-19 in Alberta:

1,044 Active Cases in Alberta (as of August 11th)

Active Cases by Zone:

471	Edmonton
312	Calgary
111	North Zone
92	Central Zone
55	South Zone

50 **Current Hospitalizations.** Another 13 individuals are in the ICU (down from peak of 22)

The Calgary zone has a higher number of total cases (6,799 or 57%) but Edmonton represents a greater proportion of current active cases. Hospitalizations (21) and ICU (7)are also highest in Edmonton, as of August 11th.

Confirmed Total Cases (as of August 12th)

20,439,814	Global
5,094,500	United States
120,844	Canada
11,893	Alberta

Economic Indicators (July 2020)

12.8% Unemployment in AB (up from 7.1% July 2019)

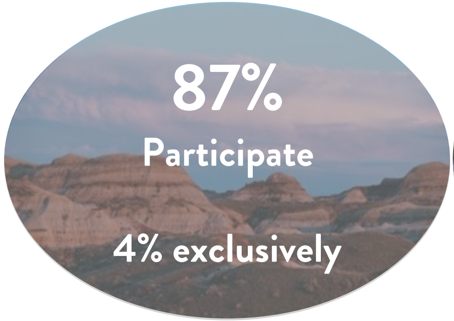
10.9% Unemployment in Canada (up from 5.2% July 2019)

19,500 Alberta businesses who closed their doors in March/April (up from an average of 5,860 monthly in 2019)

The intersection of sectors across Alberta

The Experience Economy encompasses any sector that relies on live group experiences, so 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:

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

Sports & Rec:

Arts & Culture:

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.

Note: Due to the longitudinal nature of the study, responses are carried over from Wave 1 for ~85% of respondents (to maintain consistency) and asked in Wave 2 of new respondents only. Slight fluctuations in data is reflective of the sampling approach.

The New Reality (wave 2)

Finding and Implications for Alberta Organizations

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1.

Support for the pace of re-opening grows but there are still lingering pockets of disagreement

Half of Albertans think the province is moving at the right speed when it comes to re-opening the province. This is up from the spring (when restrictions were just starting to lift) but there remains a steadfast proportion (30%) who continue to think we are moving too fast. Support for the pace of re-opening is closely linked to comfort and engagement which means perceptions of how fast re-opening occurs will be shaped by two main factors:

- Changes in the rates of infection: This is most clear in Edmonton where rates increased more sharply the summer. As communities hear about more cases, they appear to become more skeptical about the process (at least temporarily).
- Media coverage: Those who follow the pandemic closely in the news are much more skeptical about re-opening than those who choose not to follow it in the media. Our media markets are not just shaped by local news, but also what is happening internationally – particularly coverage of re-opening in the US.

2.

Comfort levels are creating a new baseline of engagement

As Albertans become more accustomed to restrictions and safeguards, different baselines of what they normally do in the experience economy are being established based on their comfort with crowds.

Comfort with groups is still very modest; this hesitancy, along with current perceptions, are leading to only tepid consideration of re-engaging with the experience economy (52% say they are not sure they will feel comfortable in public again). At the same time, the emotional state of the province remains precarious with 'worry' still the dominant emotion. Being bored, sad or indifferent are also common. Simply put, audiences are not in an optimistic mood, which is leading to less interest in activities they used to commonly do.

It should be noted that lower comfort with crowds is not uniform and outcomes are revealing some important differences. Key groups that appear more comfortable include parents, men, middle aged adults, rural Albertans, and sports & recreation enthusiasts. These are audiences who may be more engaged with the experience economy right now and are likely to come back sooner than others.

3.

Increasing gaps are appearing between audience segments on the pandemic

Not everyone will think the same about this (or any) issue. In Wave 1, key differences were noted among urban/rural groups, younger adults and women. Similar differences are found this wave but one group stands out as much different than others: men, aged 35-54. They are more likely to think the pandemic is blown out of proportion, be more comfortable in large groups, and generally want the pace of re-opening to speed up. While this was established last wave, the severity of the gap between this group and the rest of the population is significant.

Beyond their attitudes and perceptions of the pandemic, this group also stands out for how they have been impacted economically. Over half (51%) in this age category say their income has decreased since the pandemic. This is much higher than any other demographic group (and not entirely surprising given employment statistics related to the energy downturn that has transpired in recent months).

There is risk in assuming this is simply an out-of-touch segment who is just not philosophically aligned with their peers. There are significant economic variables contributing to their frustrations but there is also a strong desire to reconnect, so potential for organizations to reach them first.

4.

As restrictions lift, Albertans are are pulled by their social motivations and perceptions of safety outdoors

Despite restrictions lifting in many areas, Albertans are still wary to re-connect with many formal activities. Overall consideration is well below previous levels of participation (and since consideration or intent is only ever a fraction of true participation, this is notable). And while Albertans may not be as active right now as they were pre-pandemic, there are activities they are more willing to engage in at this time. They appear drawn to activities that are outdoors or deliver key social benefits (consistent with what we learned in the first phase of work.) For example:

- Outdoor activities like hiking or camping are both up significantly;
- Indoor visits to museums, art galleries or theatres are all down significantly;
- Overnight travel of any kind is also down notably;
- Social activities appear steady.

Re-connecting in the short term will continue to hinge on delivering benefits which match their motivations and the right conditions (which may be more challenging in the fall/winter season).

5.

Engagement is (potentially) perishable

As noted, the data is clear that Albertans are avoiding a variety of their usual activities this summer. The immediate short-term impact is obvious – organizations are suffering under the pressure of decreased business. What stands out is that about a third (35%) of Albertans are replacing the activities they used to do with completely new ones. This is likely to carry long term implications for organizations in the experience economy where loyalty may be compromised by restrictions and audiences are being introduced to new options. Furthermore, cohort rules that may force Albertans to scale back the number of formal activities they are involved in is another added pressure. With all of this, the risk of losing an audience surfaces and creates the challenge of having to re-earn their engagement and spend (retention efforts will need to be a primary focus).

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6.

Staying connected will mean the development of innovative and hybrid experiences

The emotional, social and intellectual benefits audiences derive are at the heart of why people engage with the experience economy in the first place. Maintaining that connection with audiences and avoiding erosion to new competitors will require innovative approaches (not just either digital or the real thing – but both).

Audiences do say they want regular updates and information on refunds. These are superficial connection points and likely just the minimum required to stay connected. This type of information inspires confidence and trust and is important. However, significant proportions are looking for more like modified versions of events/activities (31%), regular content (23%), online versions of experiences (22%) or completely new experiences online (21%) – all of which tap into their deeper motivations to connect in the first place.

A new reality is settling in: while Albertans would certainly like things to go back to 'normal', expectations for how they can get experiences are shifting to reflect current realities. The situation may have changed, but their desire for experiences is clearly still there.

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7.

In a crowded media space, audiences are still listening

There is a clear thirst for information on the pandemic – 79% of Albertans say they follow it in the news with 36% saying they actively look for facts, stats and stories. This gives online news sites, government sites, TV and Facebook tremendous influence over how people feel. (As noted previously, media has a major impact on comfort and perceptions of re-opening policy.) Coverage of outbreaks in their community, news out of the US and stories about a '2nd Wave' all have especially negative impacts on people's willingness to re-engage (versus statistical updates or information on re-openings – which both have largely positive impacts.) .

The point is people are listening and paying attention. It is in this environment that they also want to hear from organizations in the experience economy and they are no longer hostile to traditional marketing messages (unlike early pandemic).

What do they want to hear? Besides regular organization updates, Albertans are responding well to advertising, promotions and deals to entice participation.

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8.

Spending is obviously being impacted

Early indications reflect a likely challenge in recapturing lost revenue caused by the pandemic. Spending is down on virtually all experiences – except digital. This is not surprising for a few big reasons:

1. Availability of experiences are just not there;
2. Other economic pressures/worries impacting ability to spend;
3. Emotional state of the consumer is not confident nor conducive to spending.

The challenge is not just that people are spending less, but there are little intention to keep their money to spend later. Overall, only 13% are saving their money to spend on experiences when this is over - which is revenue organizations may be able to recapture at some point. For the other 87% there is significant risk – either because they are uncertain of where they will spend, have no plans to spend or have already redirected to other activities.

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So, where to from here?

Results this wave carry a lot of challenging insights about the impacts of the pandemic on the experience economy. Social restrictions aimed at curbing COVID-19 and the number of cases are hurting engagement, shifting comfort levels, creating social change, impacting spending, shaping expectations and generally making it difficult for organizations to reconnect with audiences. Simply put, this is the current reality and organizations should be thinking about how to adapt.

1. Comfort levels are not rebounding just because restrictions are lifting. Organizations need to **temper expectations** about reconnecting with audiences. You will not be reengaging them in the same you used to. It will take time and it will look different. Plan on it and prepare.
2. **Getting audiences comfortable** enough to attend is vital. Some of this will rebound over time, and some will be addressed by government, but there are opportunities to build confidence in what you are doing to safeguard their health. Show the steps you are taking and the tools being employed to protect audiences. Building confidence with what you are doing will help increase comfort and, in turn, consideration.
3. **Audiences and markets are changing.** There are new barriers to address and consider. Organizations will need to understand shifting mindsets of different target audiences in order to engage effectively. This could be a deep opportunity to engage for many organizations who can capitalize on their motivations and expectations.
4. **Find your voice**. Audiences are listening closely for news around the pandemic and are eager for updates, information or promotions. They want to know when experiences will be available again and are receptive to traditional marketing messages again. In fact, they expect it.
5. Adapting means **developing new product and experiences to consume**. Staying put or offering what you used to won't necessarily work. Organizations that can move into hybrid offers (not simply digital alone or in-person alone) that still leverage intrinsic motivations will be well positioned to protect their revenue from competition.

Emerging trends:

Connection to COVID-19: At this point, those who have a direct connection to COVID-19 make up 28% of the population and they are reacting differently than those who are not directly connected (more wary and a greater concern that safety outweighs economic impacts). As the pandemic wears on and the number of people infected goes up, more people will develop close connections and their perceptions may shift. We will monitor both the depth of connections people have and watch for how this group actually thinks and re-engages with the experience economy.

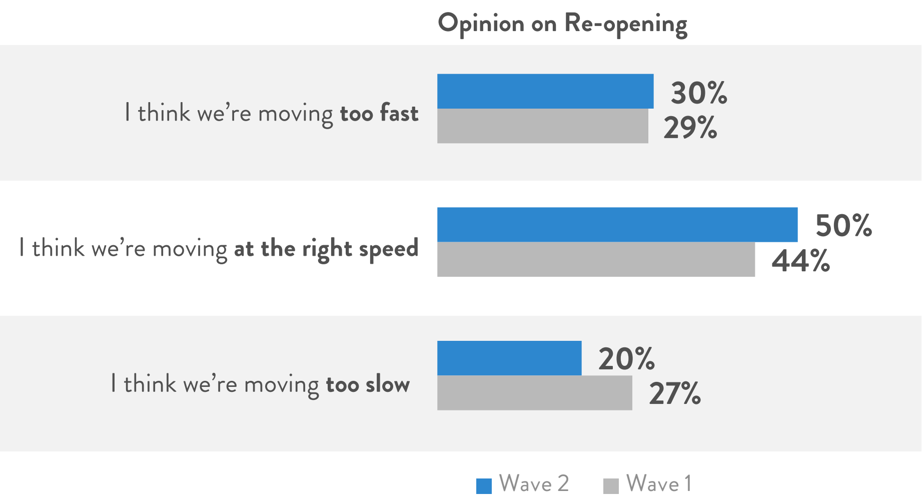
Community Breaks: Data differences reflect perceptual gaps and alignment, but not always fundamental social differences. So far, the research has highlighted the deep differences of middle-aged men (along with regional and other demographics). As differences between groups deepen and solidify, they shift into signs of real social change – which will inevitably impact how organizations re-engage with their audiences. Monitoring will determine if gaps either abate as the situation evolves or widen further – indicating genuine social change that will impact your ability to engage.

Seasonality: Turning from winter/spring into summer has facilitated people's ability to reconnect or engage in experience activities in outdoor setting simply on account of the season. At the precipice of fall, mindset and engagement is certain to change as seasons may impact ability to engage (indoor/outdoor) and waiting for 2nd wave of infections may cause more anxiety and inhibit consumer action (particularly on account of schools/activities opening up, etc.)

How have comfort levels shifted?

Albertans are still split but more feel we are moving at the right speed for re-opening

With the exception of Edmonton, most Albertans are growing more comfortable with the speed of re-opening with 70% who feel right speed or too slow.



	Calgary *n=499*	Edmonton *n=498*	North *n=101*	Central *n=130*	South *n=118*
	33%	45% ↑	20% ↓	21% ↓	25%
	32%	37%	18% ↓	19% ↓	25%
	50%	40%	52%	53%	46%
	43%	44%	43%	48%	41%
	17%	15% ↓	29% ↑	26%	29% ↑
	25%	19%	39% ↑	33%	34%

Which statement best reflects your personal opinion on the current state of re-opening in Alberta?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Despite growing comfort with re-opening, comfort levels with interacting with others haven't shifted

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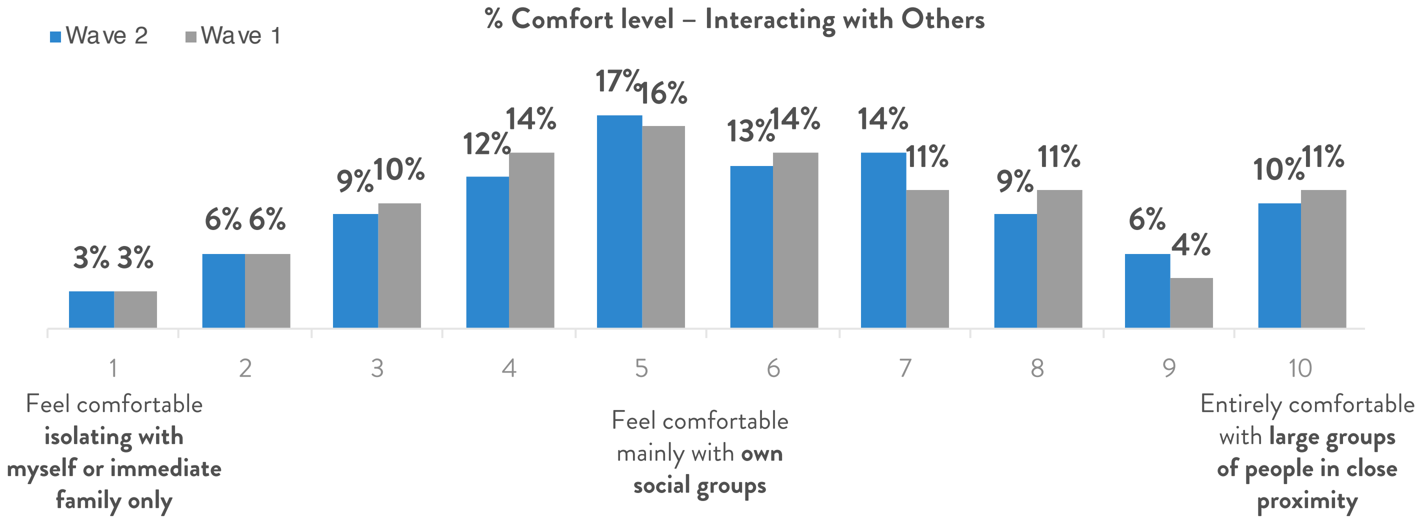
This reflects balance between wanting to see economic movement and return to normalcy but still shows nerves about the potential for more outbreaks in larger group settings. It also shows that the public understands how smaller groups are effective for limiting spread and is hesitant to face the consequences of moving away from that health measure.

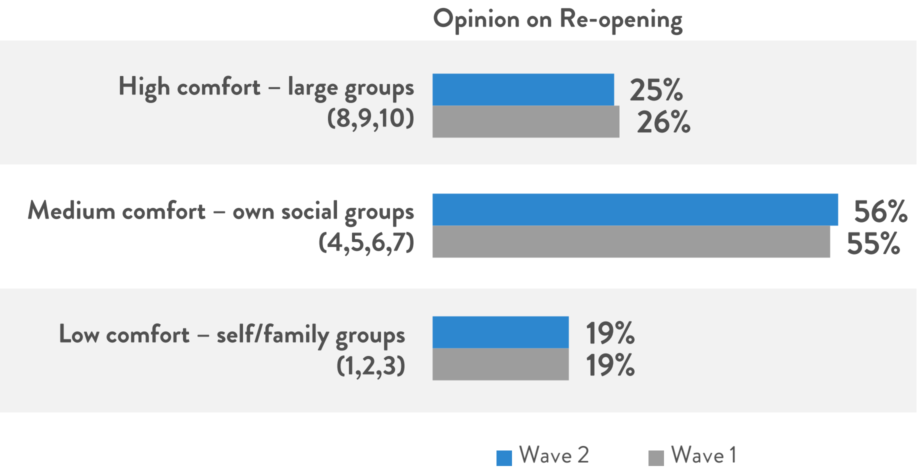


As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community?

Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

And comfort with larger groups has softened in several regions

As re-opening progresses, Albertans are tempering their anticipation with hesitation about groups – true for all regions except Southern Alberta.

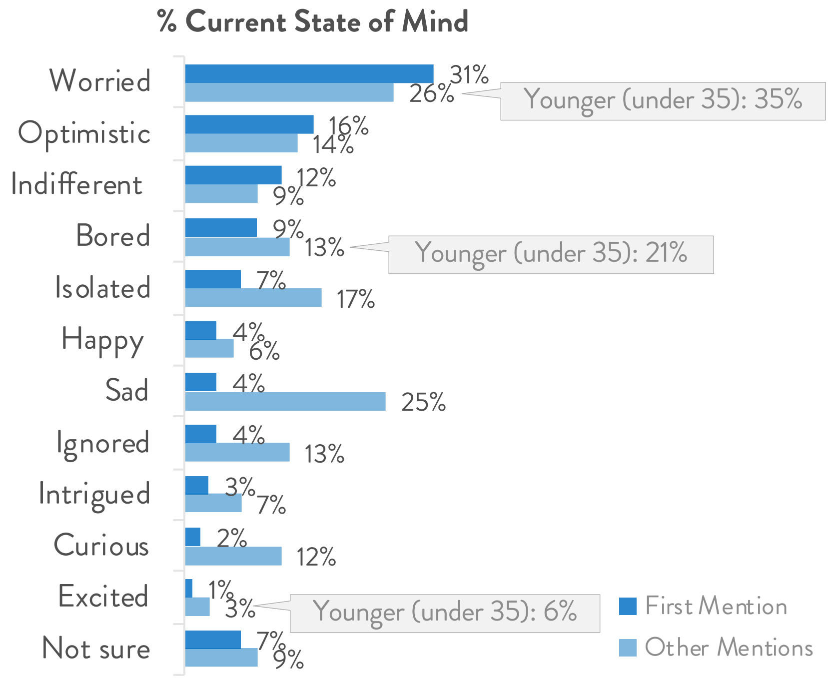


	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
High comfort – large groups (8,9,10) – Wave 2	22%	19%	33%	26%	30%
High comfort – large groups (8,9,10) – Wave 1	25%	23%	39% ↑	30%	30%
Medium comfort – own social groups (4,5,6,7) – Wave 2	58%	58%	58%	59%	55%
Medium comfort – own social groups (4,5,6,7) – Wave 1	56%	58%	42% ↓	57%	51%
Low comfort – self/family groups (1,2,3) – Wave 2	21%	24%	9%	15%	15%
Low comfort – self/family groups (1,2,3) – Wave 1	19%	19%	19%	13%	19%

Which statement best reflects your personal opinion on the current state of re-opening in Alberta?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Worry remains the dominant emotion among Albertans

Secondary feelings remain primarily negative – sad, isolated, bored , and ignored – demonstrating the different depths with which the pandemic has permeated the thinking and behaviours of Albertans.



Given everything that is happening in Alberta, which of the following best describes how you are feeling today?
And how else are you feeling given everything that is happening in Alberta? Please select all that apply.
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

The complexity of issues surrounding COVID-19 and the uncertainty around comfort continues to materialize in the attitudes of Albertans.

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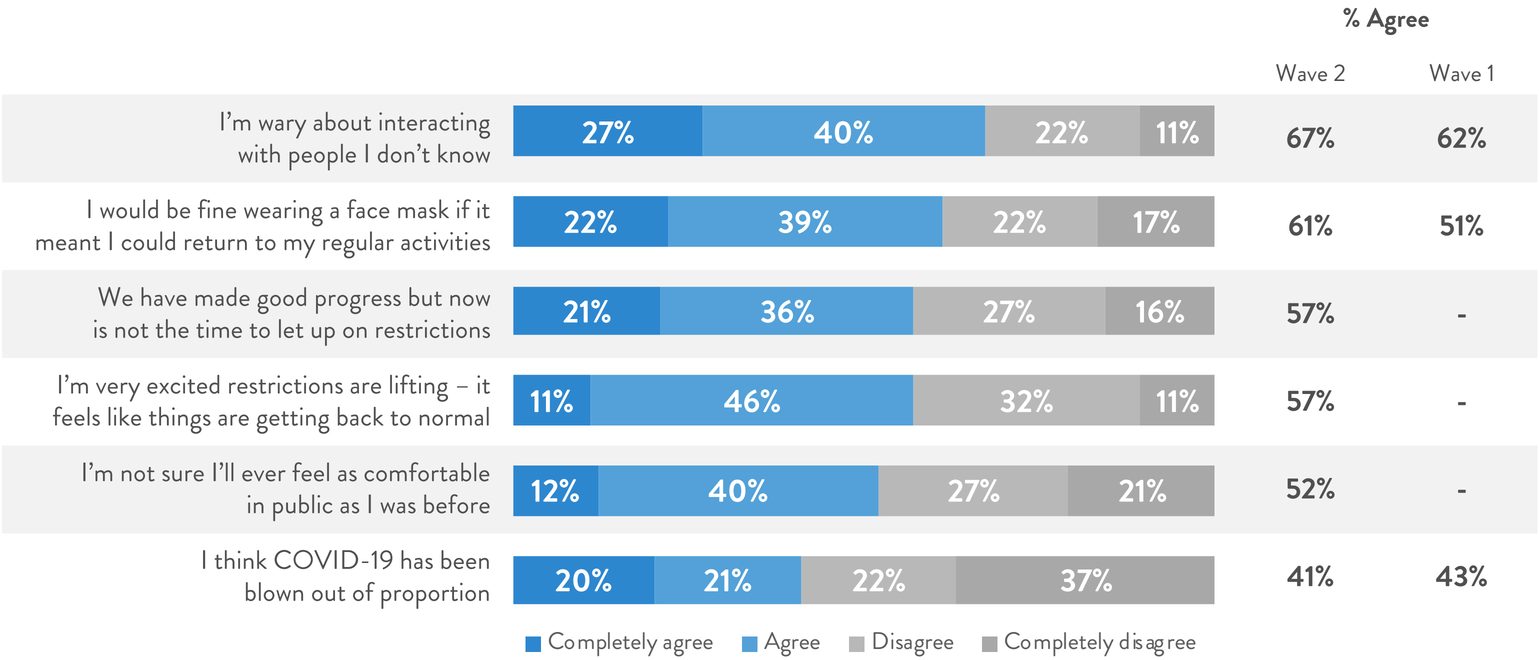
There is a growing wariness to interact with others (up to 67% of Albertans), yet tempered excitement as restrictions lift and people feel things start to return to normal. Mask wearing is also shifting to be become a more acceptable practice as many local bylaws are introduced to require one.



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=1036). Note: Calgary + Edmonton include supplemental sample

And differences are starting to crystallize along demographic and geographic lines

Those who identify as female and younger age groups are still more likely to be wary around people and identify risks with letting up on restrictions. Regionally, Edmontontians have seen an uptick in general hesitation in Wave 2 .

% Agree	Total Alberta	Gender: Female n=509	Gender: Male n=519	Age: 18-34 n=324	Age: 35-54 n=376	Age: 55+ n=336	Region: Calgary n=499	Region: Edmonton n=498	Region: North n=101	Region: Central n=130	Region: South n=118
I'm wary about interacting with people I don't know	**67%**	74% ↑	59% ↓	73% ↑	61% ↓	69%	70%	77% ↑	59%	59%	59%
I would be fine wearing a face mask if it meant I could return to my regular activities	**61%**	67% ↑	55% ↓	70% ↑	55% ↓	59%	69% ↑	65%	46% ↓	54%	50% ↓
We have made good progress but now is not the time to let up on restrictions	**57%**	66% ↑	49% ↓	61%	52% ↓	61%	61%	68% ↑	45% ↓	49%	52%
I'm very excited restrictions are lifting – it feels like things are getting back to normal	**57%**	53% ↓	62% ↑	52% ↓	62% ↑	57%	56%	43% ↓	73% ↑	62%	65%
I'm not sure I'll ever feel as comfortable in public as I was before	**52%**	60% ↑	42% ↓	56%	44% ↓	56%	53%	61% ↑	36% ↓	49%	49%
I think COVID-19 has been blown out of proportion	**41%**	32% ↓	50% ↑	34% ↓	48% ↑	40%	36%	30% ↓	58% ↑	48%	51%

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=1036). Note: Calgary + Edmonton include supplemental sample

Arts audiences also remain more apprehensive but the differences are most pronounced between exclusive audiences (which represent a smaller number of Albertans)

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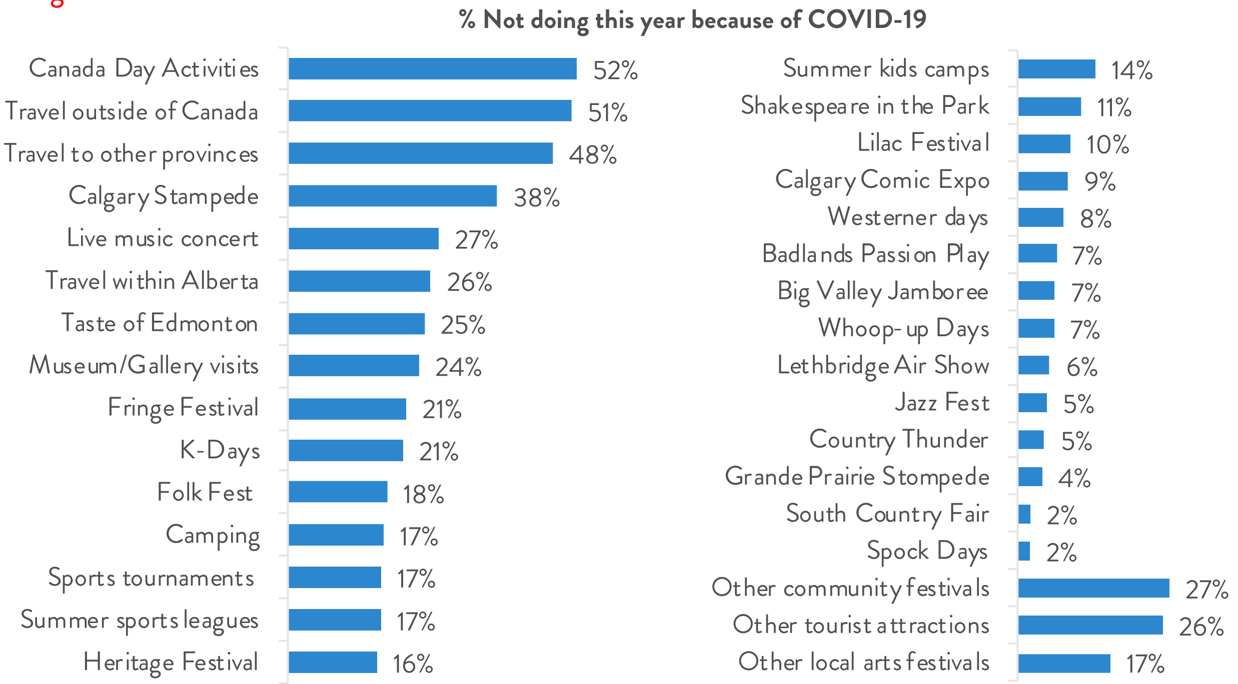
% Agree	Total Alberta	Audience Type			Exclusive Audience	
		Arts/Culture *n=781*	Sports/Rec *n=865*	Travel *n=898*	Arts/ Culture n=93	Sports/ Rec n=177
I'm wary about interacting with people I don't know	**67%**	70% ↑	67%	67%	77%	57% ↓
I would be fine wearing a face mask if it meant I could return to my regular activities	**61%**	64% ↑	60%	61%	71%	50% ↓
We have made good progress but now is not the time to let up on restrictions	**57%**	60% ↑	56%	58%	71% ↑	45% ↓
I'm very excited restrictions are lifting – it feels like things are getting back to normal	**57%**	55% ↓	58%	58%	50%	69% ↑
I'm not sure I'll ever feel as comfortable in public as I was before	**52%**	54%	51%	52%	61%	47%
I think COVID-19 has been blown out of proportion	**41%**	37% ↓	41%	40%	36%	55% ↑

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=1036). Note: Calgary + Edmonton include supplemental sample

Summer Activities and Substitutions

Activities that Albertans are avoiding this summer demonstrates the breadth of impact on the experience economy across the province

Impact on specific events is obviously regionally dependent as well as a reflection of involvement by sector (sports, arts, etc.) but the average number of activities that Albertans are avoiding is 5.8.



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: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Travel and Festivals are two categories of activities that will feel the biggest gap this summer, although all live experience sectors are affected

Even though activities may be offered (many in modified form), comfort levels and economic circumstances are just two factors that still may result in Albertans staying away from an activity.

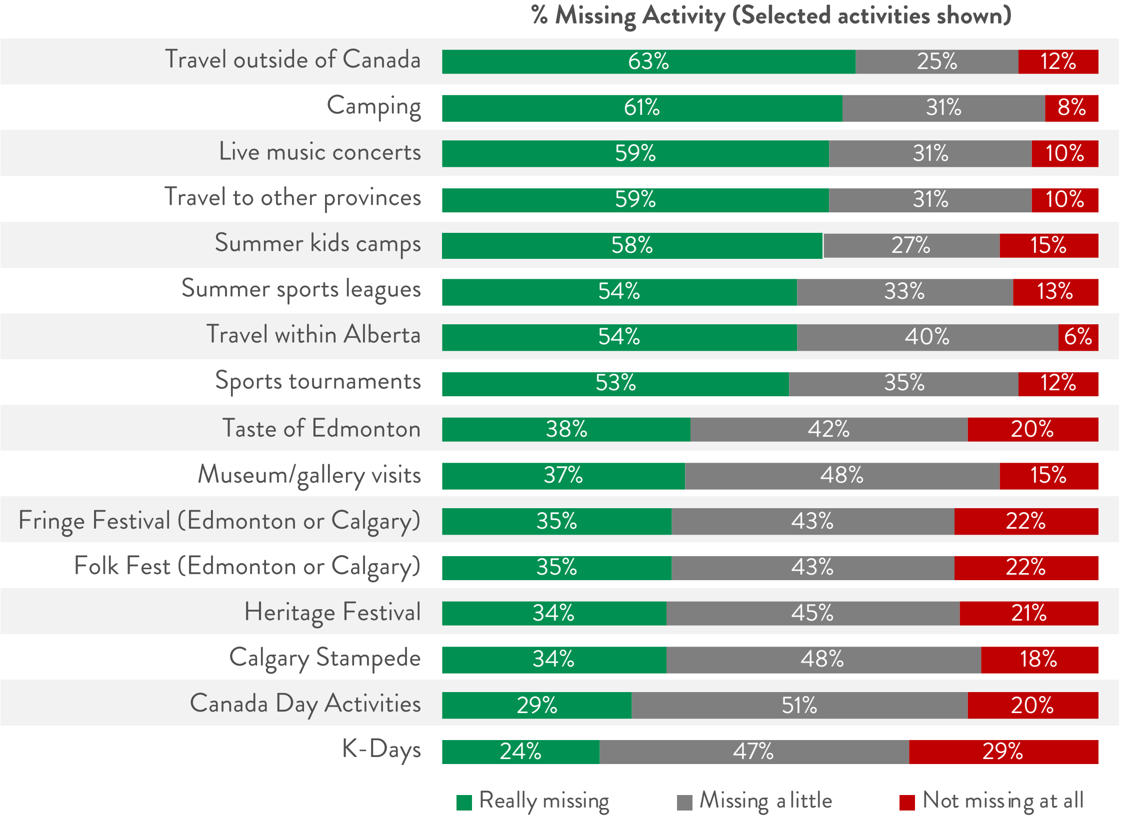
		Gender		Age			Audience Type		
% Not doing this year (Net Activity Type)	Total Alberta	Female n=509	Male n=519	18-34 n=324	35-54 n=376	55+ n=336	Arts/Culture n=781	Sports/Rec n=865	Travel n=898
Travel	72%	75%	69%	72%	71%	72%	76% ↑	76% ↑	77% ↑
Festivals	72%	75%	68%	77% ↑	74%	63% ↓	80% ↑	76% ↑	76% ↑
Sport/rec activities	40%	41%	39%	40%	48% ↑	29% ↓	44% ↑	46% ↑	43% ↑
Live music	39%	40%	37%	46% ↑	40%	30% ↓	47% ↑	41% ↑	42% ↑
Theatre	31%	36% ↑	26% ↓	43% ↑	29%	22% ↓	38% ↑	32%	32%
Art	31%	36% ↑	26% ↓	35%	30%	28%	38% ↑	33% ↑	33% ↑

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: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Which activities are missed most?

Albertans who are 'really missing' at least one activity tend to have been previously active in the experience economy. They are keeping up to date with COVID-19 information 'very closely' and are slightly less comfortable in large groups.



And when you think about all the things you typically do, to what degree are you missing these activities NOTE: Top activities shown (minimum base size of 100)

Base: Typically participated (n=varies). Note: Calgary + Edmonton include supplemental sample

To what extent are Albertans replacing missed activities?

For Albertans who are replacing activities with something entirely new, there are implications for sectors who hope to "draw back" participants over time. Retention strategies to reach "lapsed" participants are going to be more critical in the short term.

	% Replacing Activities	Calgary n=372	Edmonton n=377	North n=55	Central n=75	South n=83
Nothing – just have more free time	44%	43%	43%	42%	39%	39%
Replacing with completely new activities	35%	37%	37%	37%	32%	42%
Participating in scaled back versions of what we used to do	23%	22%	21%	26%	28%	23%
Engaging with online/digital versions of what we used to do	18%	19%	22%	13%	13%	14%
Recreating the event/activities on our own	14%	15%	13%	17%	18%	12%

To what extent are you replacing the activities you really used to miss? Please select all that apply.
Base: Really missing at least one activity (n=varies) Note: Calgary + Edmonton include supplemental sample

Communication is critical: updates and information on resumption of activities/refunds is key as organizations try to stay connected

Beyond modified or online versions of experiences or regular content, most Albertans simply want to be "in the know" on what organizations are doing to to move forward . With information in hand, they can then make the most informed decisions on participation (both modified and regular versions).

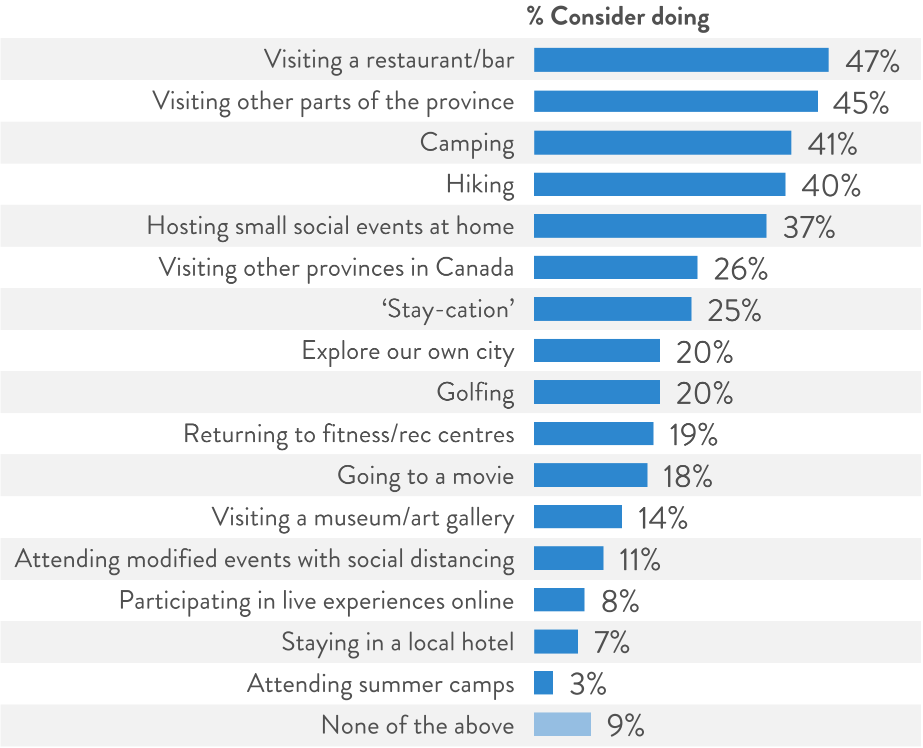
What experience organizations could be doing:	Total	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
Provide updates on when they will be open	60%	61%	63%	55%	52%	57%
Provide information on refunds	38%	40%	43%	38%	27% ↓	29%
Deliver modified versions of events/activities	31%	31%	32%	27%	25%	29%
Offer regular content to keep my interest	23%	26%	25%	25%	13% ↓	22%
Deliver online versions of their experiences	22%	23%	25%	21%	20%	21%
Develop new experiences online	21%	22%	27%	20%	14%	18%
None of these	19%	19%	15%	26%	26%	18%

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: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

What are Albertans considering next?

Bars/restaurants, local travel, camping, hiking and smaller social events are what Albertans are going to gravitate towards first. Collectively, Albertans are considering activities that can satisfy their main motivations for engagement (social) but also offer greater comfort (outdoor locations).



4.0

Average number of activities considering

Who is more likely to consider activities?

- **Younger audiences** (under 35)– an average of 4.4 activities.
- Audiences with **children in the household** – an average of 4.4 activities

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: Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Intentions are even softer when aligned with previous behaviours

Stone—Olafson

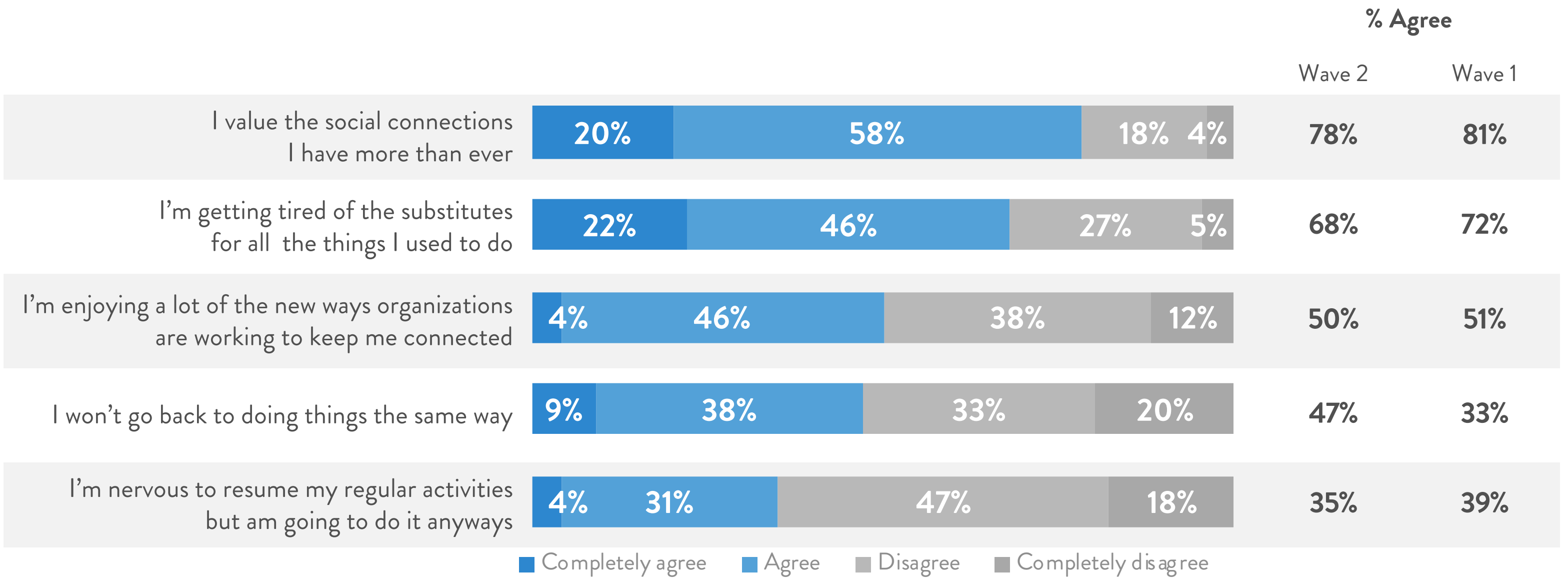
A comparison of the activities that Albertans participated in on a regular basis pre-COVID and their consideration of activities over the next couple months show a stark reduction in intention to engage (loosely compared for selected activities). Participation is only ever a fraction of consideration, meaning not all those who are considering an activity will actually translate their intention into action – this means the return to activity may be even softer than these numbers suggest.

Activity Category	% Previously Done (Pre-COVID)	% Considering
Travel within province	76%	47%
Travel within Canada	63%	26%
Outdoor activities (camping, hiking, etc.)	62%	-
Camping	-	40%
Hiking	-	41%
Movies at a theatre	57%	18%
Gym, fitness or rec centre	40%	19%
Museums	35%	
Art galleries/art shows	18%	
Museum/art gallery	-	14%

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: Base: Main sample (n=1036).

Realization is setting in that the resumption of activities will also mean things won't be done the same way again

Why does fatigue feel like less of a factor? The phased re-opening in Alberta means people can cautiously resume some activities, albeit in modified form. This has the effect of softening the fatigue factor for substitution activities.



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=1036). Note: Calgary + Edmonton include supplemental sample

Attitudes on connecting throughout restrictions shift primarily along gender lines

Stone — Olafson

There is generally a consistency in attitudes across the province although there is some differences by gender (other differences by age and region are more muted). There is a general appreciation for social connections and moderate fatigue for substitution activities.

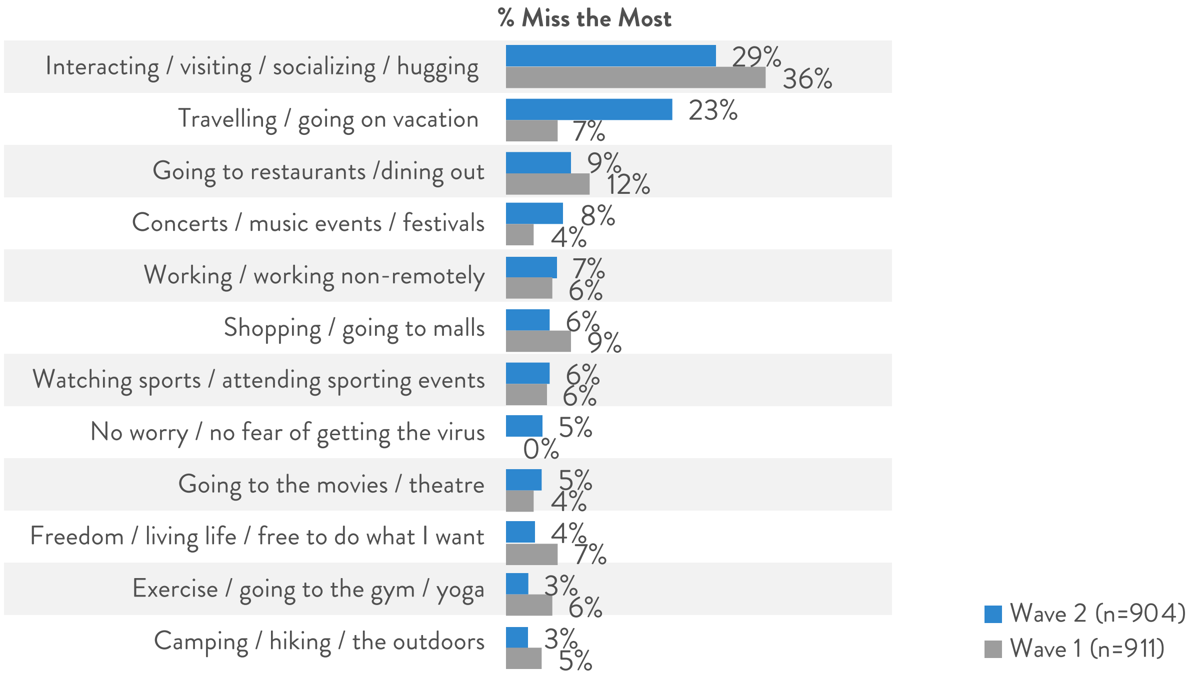
% Agree	Total Alberta	Gender		Age			Region				
		Female n=509	Male n=519	18-34 n=324	35-54 n=376	55+ n=336	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
I value the social connections I have more than ever	**78%**	82% ↑	74% ↓	81%	78%	77%	79%	79%	62% ↓	79%	82%
I'm getting tired of the substitutes for all the things I used to do	**68%**	64%	72%	72%	68%	63%	66%	63%	73%	66%	67%
I'm enjoying a lot of the new ways organizations are working to keep me connected	**50%**	57% ↑	43% ↓	54%	48%	49%	48%	56% ↑	44%	49%	45%
I won't go back to doing things the same way	**47%**	53% ↑	40% ↓	51%	41% ↓	50%	49%	54%	30% ↓	43%	47%
I'm nervous to resume my regular activities but am going to do it anyways	**35%**	38%	32%	35%	32%	38%	38%	35%	24%	35%	33%

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=1036). Note: Calgary + Edmonton include supplemental sample

What's missed most?

Socialization (a key motivation for engagement) remains the most "missed", even though the sentiment is softening as re-opening progresses and more activities are made available. With the summer months, there is a notable uptick for missing travel and vacation.



Of all the things you used to be able to do, what do you miss the most? (mentions of 5% or greater included)
Base: Main sample who provided responses (n=varies) Note: Calgary + Edmonton include supplemental sample

How do External Influences Shape Perceptions?

The majority of Albertans (79%) are still following news of the pandemic

Stone — Olafson

Information fatigue doesn't appear to be setting in strongly as Albertans are still looking for information on re-opening and the upcoming school year (but is slightly higher outside city centres).

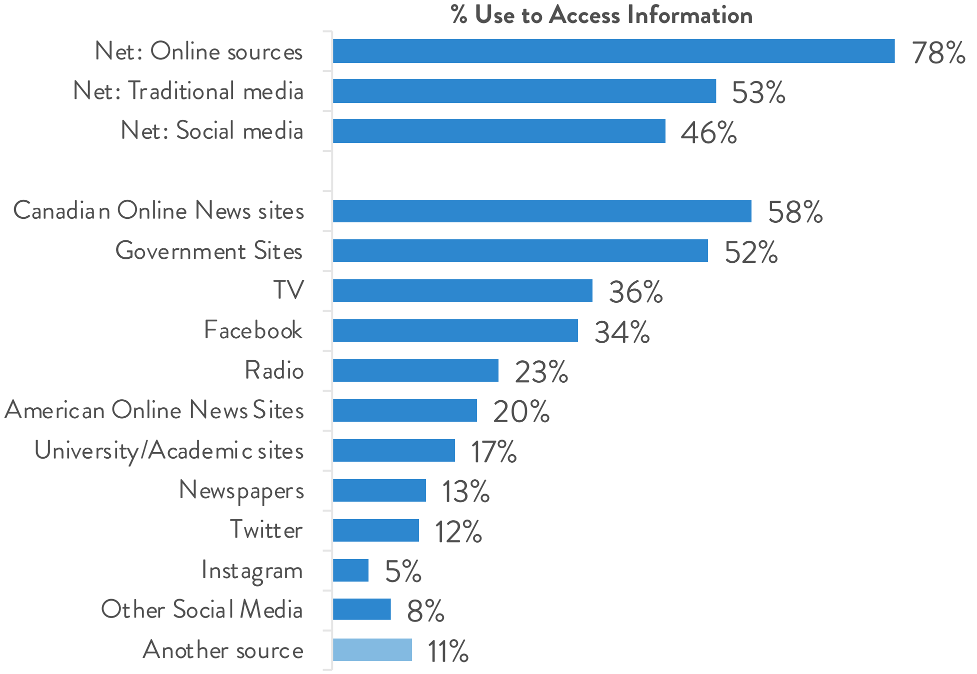
	% Following News & Information	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
Very Closely – I actively look for updates, facts, statistics and stories	36%	38%	41%	26%	33%	25% ↓
Quite closely – I pay attention when it comes up but don't go looking for it	43%	44%	44%	39%	42%	43%
Not closely – I only pay attention when someone makes me or if something really gets my attention	11%	11%	8%	12%	11%	14%
Avoid it – I am tired of the news on COVID-19 and avoid it if at all possible	10%	7%	6% ↓	23% ↑	14%	18% ↑

Generally speaking, how closely are you following any news and information about the COVID-19 Pandemic?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Albertans are accessing information through a variety of sources, primarily online

Stone—Olafson

Understanding sources is a useful barometer of the lens through which Albertans try to assess the pandemic in their own lives and can be an indicator of where trust lies. The high usage of some social sites where misinformation can be present is also important to understand how perceptions are shaped.



2.9

Average number of sources used for information on COVID-19

Who is looking at many sources?

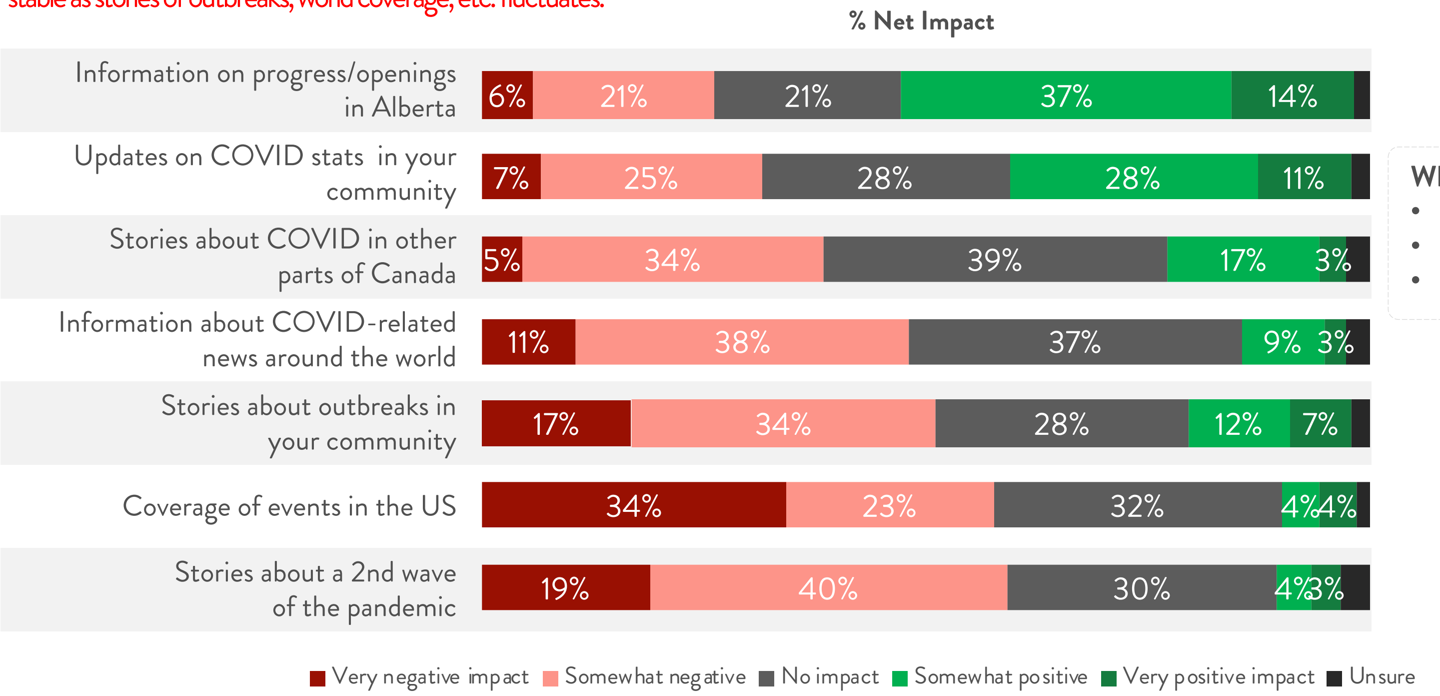
- Have **low comfort levels** around unfamiliar people (3.2 sources)
- Believe **restrictions are lifting too fast** (3.2 sources)
- Have a **closer connection to COVID-19** (e.g. know someone who tested positive, know someone living in a community where there was an outbreak) (3.2 sources)

Where are you getting most your information and new about COVID-19? Please select all that apply.
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

In the current climate, news information tends to have a stronger net negative impact on intent to re-engage

Stone – Olafson

But there is a significant portion of Albertans who feel no impact as a result of the news cycle – the behaviour (intent) of these individuals will likely be more stable as stories of outbreaks, world coverage, etc. fluctuates.



Who is likely to cite "no impact"?

- Males
- Central, South regions
- Those with high comfort levels

What impact, if any, do the following stories have on how you feel about re-engaging with activities you used to do?

Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Across the province, the Capital region is feeling more negative impact from the news cycle

Stone Olafson

In Wave 1, hesitation was stronger in the Calgary region based on outbreaks – as the Capital region has caught up with respect to caseload , some of the nervousness has transferred to that region.

	% Negative Impact						% Positive Impact				
	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118		Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
	26%	38% ↑	18%	21%	21%	Information on progress/ openings in Alberta	56% ↑	44%	55%	44%	45%
	33%	43% ↑	28%	23%	27%	Updates on COVID stats in your community	40% ↑	31%	41%	38%	33%
	39%	48% ↑	36%	39%	34%	Stories about COVID in other parts of Canada	22%	20%	15%	15%	23%
	51%	58% ↑	36% ↓	42%	46%	Information about COVID-related news around the world	14%	10%	9%	9%	10%
	51%	63% ↑	40%	47%	45%	Stories about outbreaks in your community	21% ↑	13%	15%	16%	17%
	62%	67% ↑	45% ↓	53%	47% ↓	Coverage of events in the US	9%	5%	5%	6%	14%
	60%	69% ↑	54%	58%	48% ↓	Stories about a 2nd wave of the pandemic	8%	7%	4%	6%	9%

What impact, if any, do the following stories have on how you feel about re-engaging with activities you used to do?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Albertans are a captive audience: 79% who have noticed some form of advertising or media coverage about activities available

Media stories and ads that promote attractions within Alberta have the highest breakthrough.

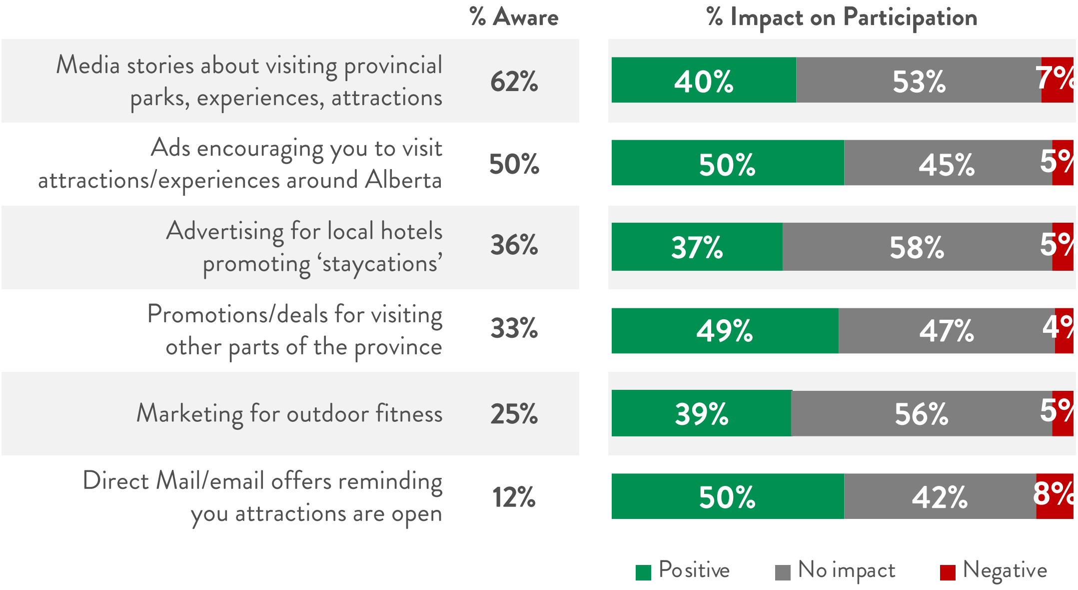
	% Aware	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
Media stories about visiting provincial parks, experiences, attractions	62%	64%	65%	54%	57%	59%
Ads encouraging you to visit attractions/experiences around Alberta	50%	49%	57% ↑	42%	44%	52%
Advertising for local hotels promoting 'staycations'	36%	42%	40%	23% ↓	33%	29%
Promotions/deals for visiting other parts of the province	33%	33%	41% ↑	28%	29%	33%
Marketing for outdoor fitness	25%	23%	28% ↑	26%	23%	18%
Direct Mail/email offers reminding you attractions are open	12%	13%	12%	9%	13%	11%
None of these	21%	19%	19%	31% ↑	25%	24%

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: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

And the net impact of advertising and promotions on intentions is generally positive

There is a similar portion of Albertans who state these marketing messages will have no impact on their intentions (across message types) but this is not the same as opposition towards marketing. In essence, Albertans expect some basic marketing messages but there is no evidence of fatigue or hostility towards this type of communication from organizations (and there is a consistency of positive impact across regions).



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). Note: Calgary + Edmonton include supplemental sample

Understanding How Discretionary Spending is Shifting

Perceptions on the economic impact of COVID-19 and the severity of concerns are polarizing Albertans

Stone — Olafson

Nearly equal portions of Albertans feel the economic toll of restrictions was worth it as those who think economic problems are more serious than COVID-19. Regionally, there are stark differences – Edmontonians prioritize safety from COVID-19 while Northern Albertans prioritize impacts on the economy.

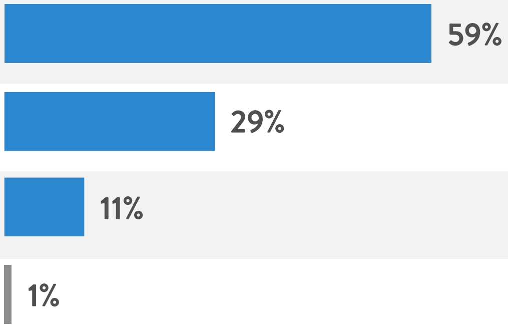
	Completely agree	Agree	Disagree	Completely disagree	% Agree	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
The economic impact of restrictions is steep but worth it to keep us safe	24%	36%	22%	18%	60%	61%	69% ↑	45% ↓	57%	57%
The economic uncertainty in Alberta is a more serious problem than COVID-19	34%	25%	26%	15%	59%	56%	49% ↓	73% ↑	63%	65%

(Wave 1) "Energy Prices are a more serious problem than COVID-19": 49%

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=1036). Note: Calgary + Edmonton include supplemental sample

The majority of Albertans have decreased their spending on non-essential items

Employment tends to be the greatest deciding factor on spend. Those who are still employed are spending the same, but as expected, Albertans who have lost their job or have reduced hours are more likely to be spending less. Further, art/culture audiences have decreased spending more so than sports/rec who have kept their discretionary spending the same during the pandemic.



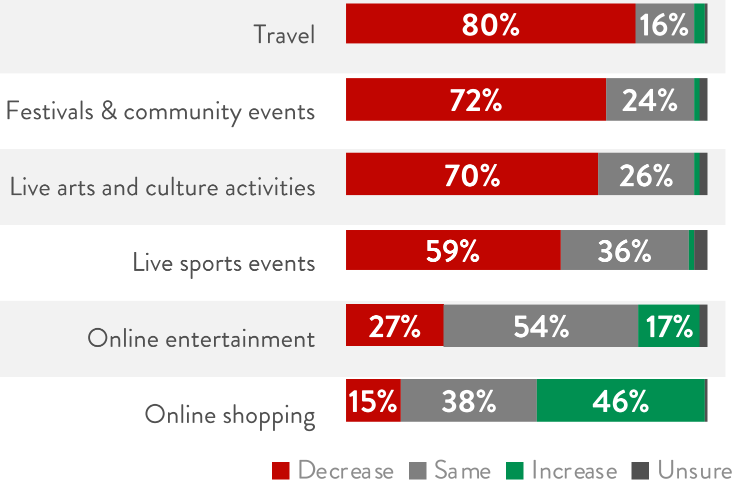
Spending on non-essential items		Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
Spending has decreased	59%	63%	59%	49%	59%	58%
Spending has stayed the same	29%	27%	25%	37%	33%	35%
Spending has increased	11%	9%	14%	14%	7%	7%
Unsure	1%	2%	2%	1%	1%	0%

Thinking about your overall spending on non-essential items, would you say your overall discretionary spending has decreased, stayed the same or increase?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

And reductions in spend are felt most intensely in travel, festivals, and arts/culture events

Stone — Olafson

Spending on…



	% Decrease Spend				
Spending on…	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
Travel	82%	84%	73%	74%	81%
Festivals & community events	73%	79% ↑	67%	69%	75%
Live arts and culture activities	73%	77%	68%	65%	68%
Live sports events	62%	65%	55%	48% ↓	59%
Online entertainment	28%	29%	22%	27%	22%
Online shopping	13%	16%	15%	16%	9%

Now thinking more specifically, how has your spending on the following changed?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Shifts in spending are concerning: few Albertans (13%) are planning to spend as usual when restrictions lift which means future revenue is uncertain

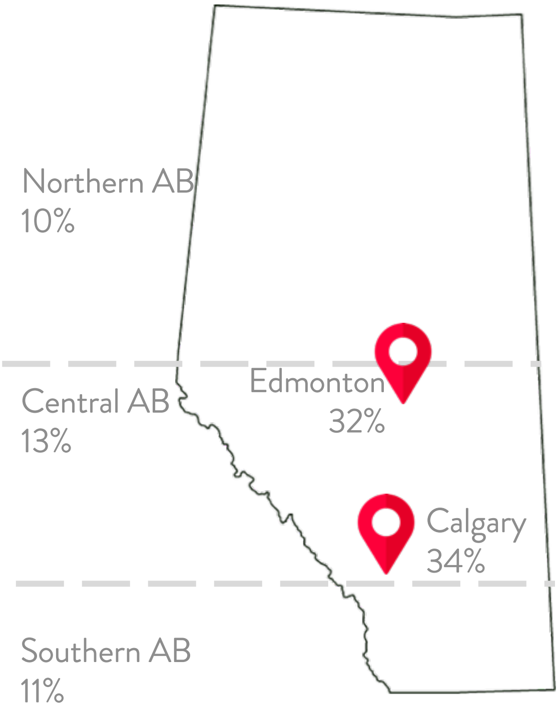
Reaction to spending less	Total	Calgary n=499	Edmonton n=498	North n=101	Central n=130	South n=118
Saving the money with no intention of spending it in the short term	35%	40%	33%	30%	27%	31%
Redirect our spending into other areas – home or other activities	34%	32%	39%	34%	40%	35%
Save the money for when things open up and spend it then	13%	11%	12%	13%	11%	14%
No plans yet	18%	17%	16%	23%	22%	20%

Which of the following best describes how your household is most likely to react to spending less during the pandemic?
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

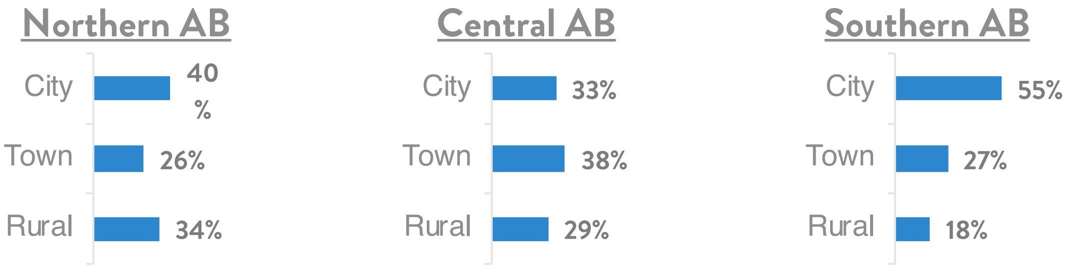
Respondent Profile

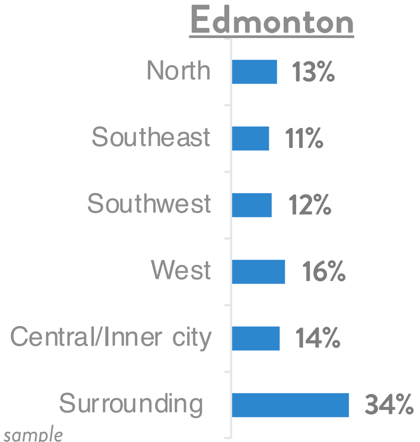
Who we heard from

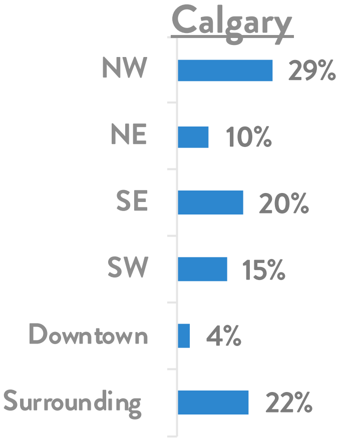
Region



Community Type



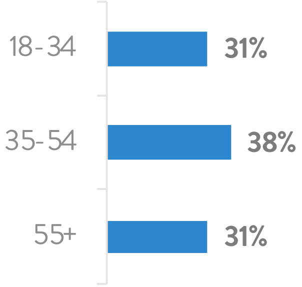




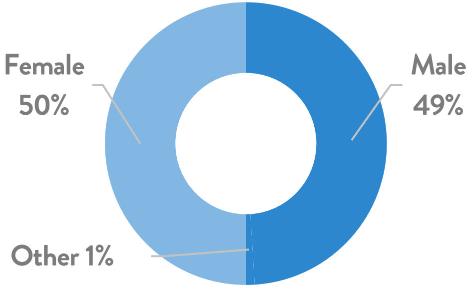
Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Who we heard from

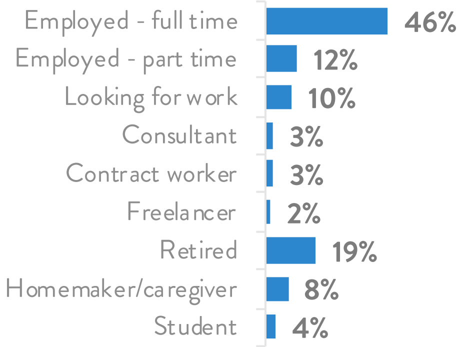
Age



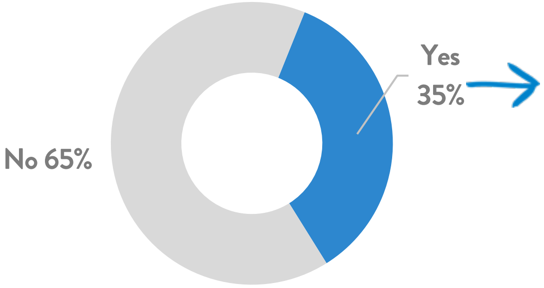
Gender

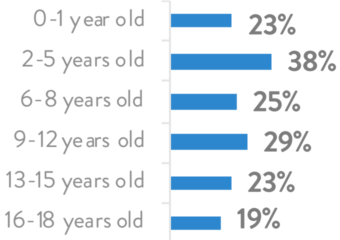


Employment

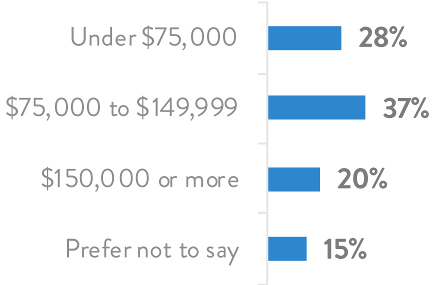


Children in the Household





Household Income



Base: Main sample (n=1036). Note: Calgary + Edmonton include supplemental sample

Stone Olafson

Understanding people. It’s what we do.