

A bicycle with a basket is parked on a path that leads towards a sunset. The path is illuminated by the warm light of the setting sun, creating a strong reflection on the ground. The background shows a hilly landscape with some dry vegetation.

The NEW Experience Economy:

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

Phase 3 Results
November 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.**



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.

With seasons changing, schools and businesses have started to open up (albeit in modified forms), and attitudes and behaviours of Albertans have the potential to shift alongside. The third round of research focuses on the following:



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



Inform understanding of risk tolerance to engagement;



Gauge receptivity to activity types, program delivery, and other forms of engagement; and,



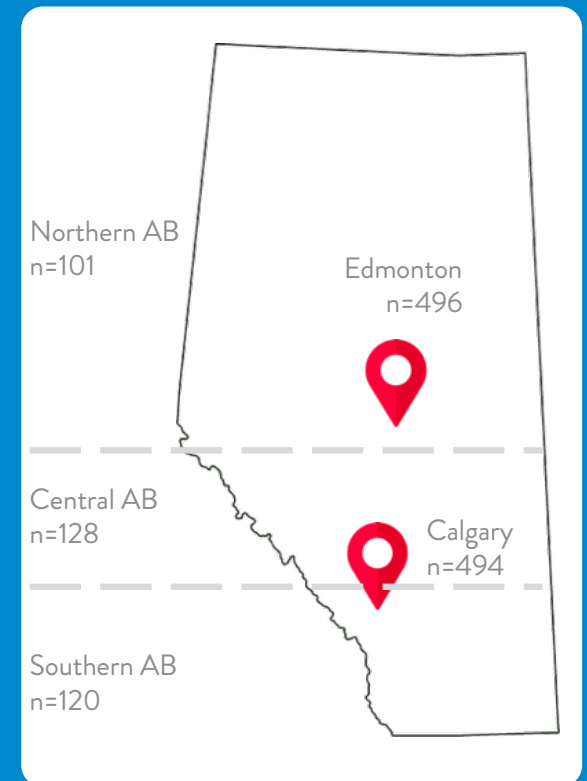
Capture intentions related to spending and giving.

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 3. 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 1,342 Albertans participated in this third phase of research. Responses include 1,020 regionally balanced core sample, plus supplemental (booster) responses for Calgary and Edmonton.
- The longitudinal survey includes 80% of respondents retained from phase 2 (20% of respondents new for phase 2).
- Data collection occurred between October 5 and October 16, 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.

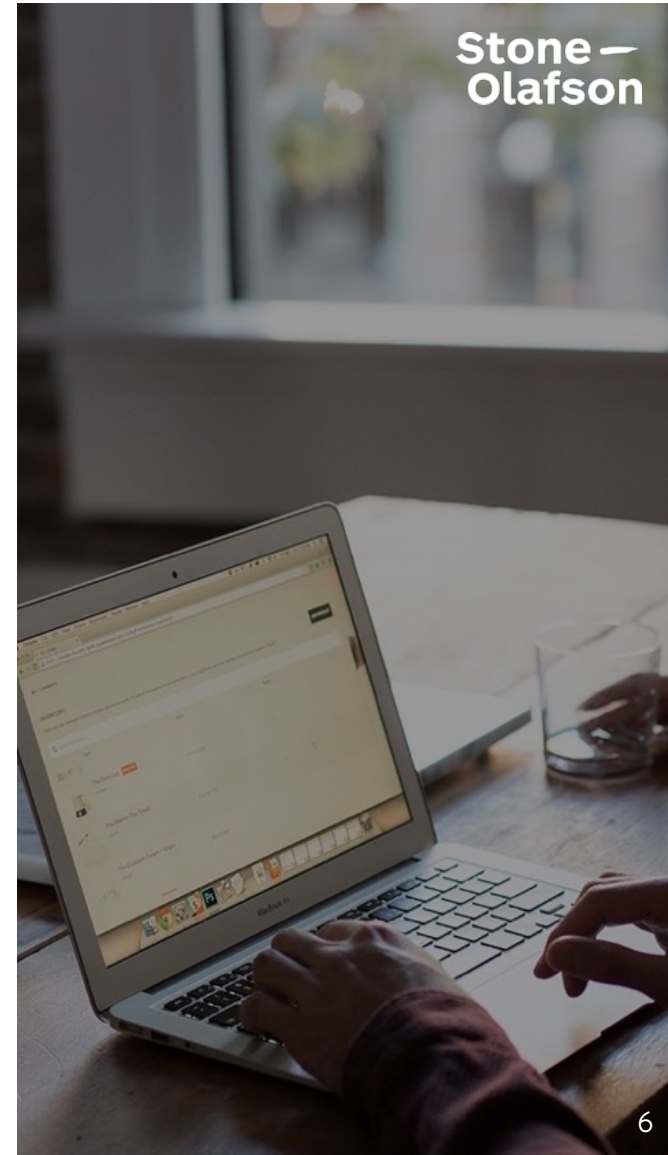


Additional Notes on Reading the Report

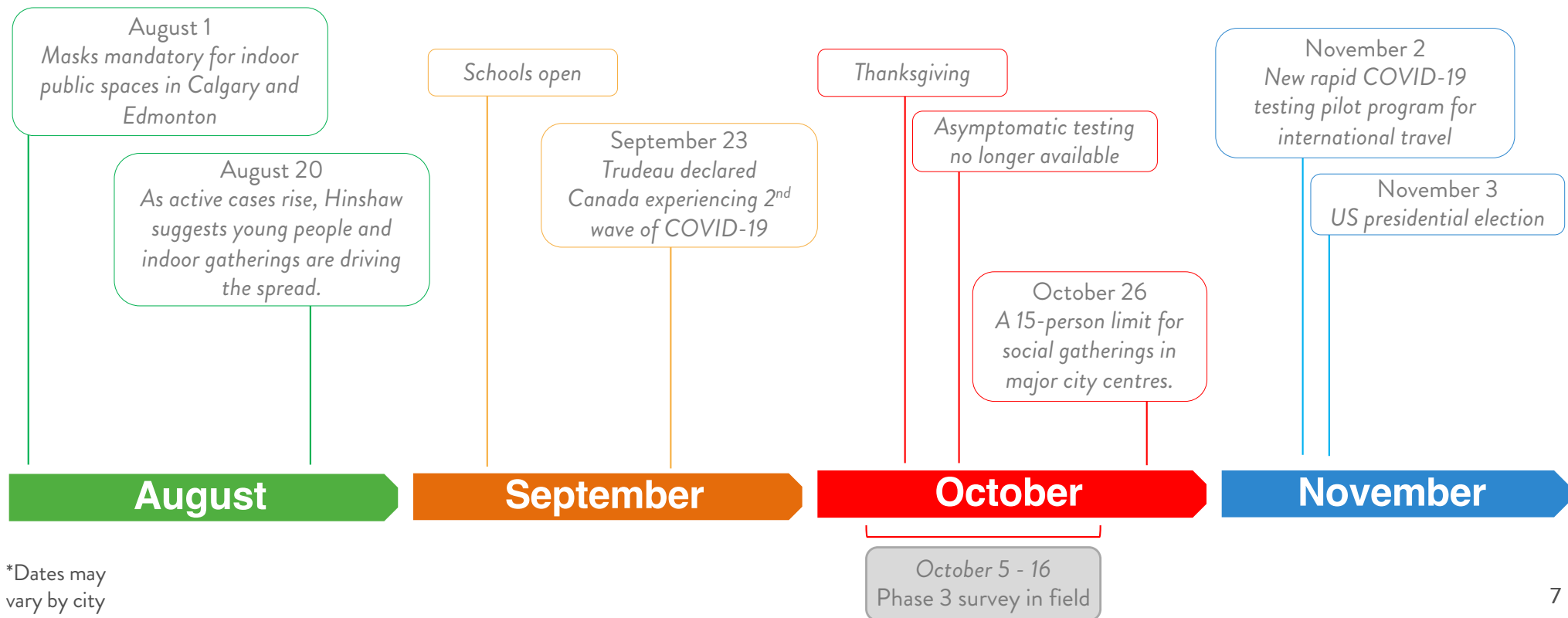
Numbers presented have been rounded and sums may not correspond exactly to numbers in the detailed data tables made available.

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.

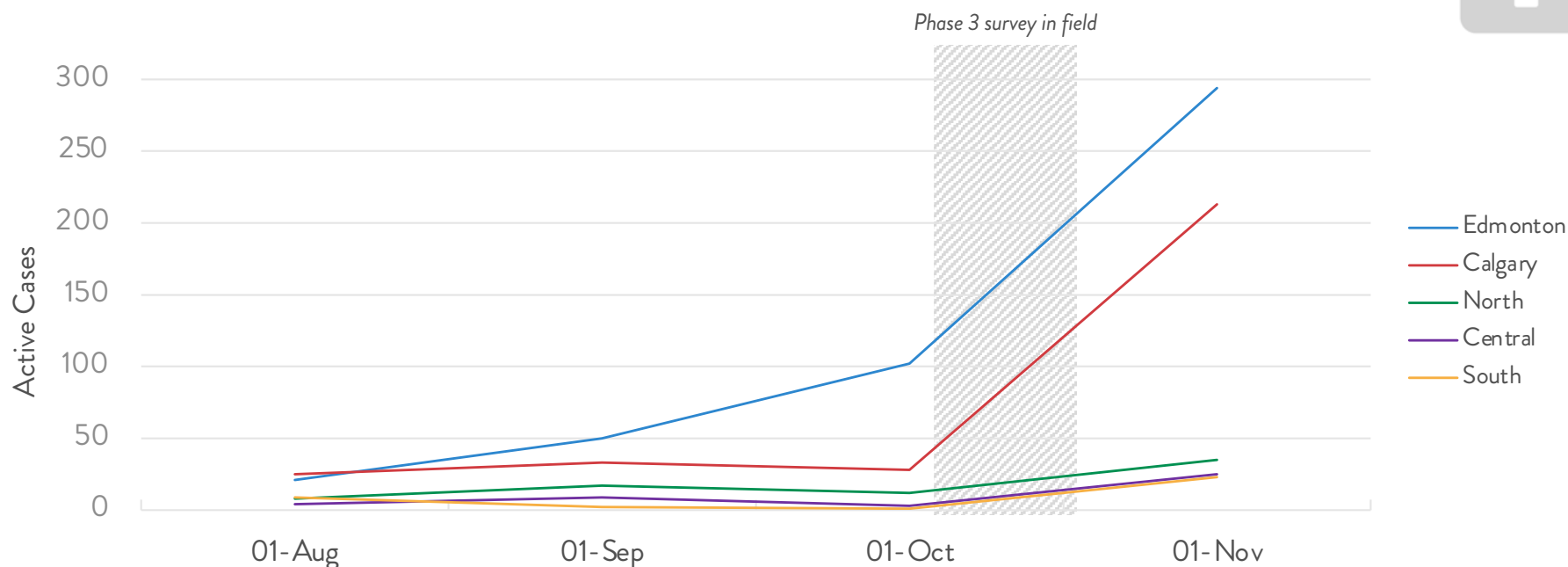


Mapping the progression of COVID-19 in Alberta



COVID Contexts: By the Numbers

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Total Cases Alberta	1296	1418	1549	5996
% Change (previous month)	+137%	+9%	+9%	+287%
Hospitalizations	72	52	60	156

Economic Indicators that Influence Perceptions:

Alberta continues to be harder hit than many regions from an economic standpoint. Even as unemployment has decreased, the numbers are jarring and reflect a growing frustration among Albertans that materializes in the data outcomes.

Key Numbers:

35%

Percentage of Albertans who report a sustained decrease in HH income since March 2020.

11.7%

Unemployment in AB (6.6% September 2019)

9.0%

Unemployment in Canada (10.5% August 2020; 5.5% August 2019)

+11.3%

Employment growth in Western Canada in the Arts, entertainment & recreation sector – but still only recovered 33% of the 70,000 jobs lost.

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:



Sports & Rec:



Arts & Culture:



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

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 Phase 1 & 2 for ~83% of respondents (to maintain consistency) and asked in Phase 3 of new respondents only. Slight fluctuations in data is reflective of the sampling approach.

Phase 3 Outcomes: Finding and Implications for Alberta Organizations



These barriers are
placed 2 metres
apart to help you
socially distance

1.

Community attitudes on comfort are becoming entrenched

Over 6 months in, comfort levels have shown to be relatively stable. There are differences across the province driven by caseloads, density, and likely politics, but for now, general attitudes surrounding comfort appear set.

As comfort levels have cemented themselves, behaviours and actual engagement in their usual activities have clearly dampened. Audiences are simply not connecting with their usual activities in the same way or to the same degree. This is now impacting willingness to participate in activities with larger groups of people – regardless of social distancing measures put in place. This does not mean Albertans lack the desire to re-engage but attitudes reveal a level of frustration.

The question over the long-term remains whether or not cemented audience habits will overcome comfort and be harder to recapture over time.

Why this matters: Comfort with conditions and other people has dampened willingness to actually engage in their usual activities. It is likely this variable is an additional barrier impacting final consideration of participating in activities.

2.

Risk tolerance provides a richer understanding of how Albertans will approach engagement

Because general attitudes on comfort are not moving, shifting to a deeper understanding of risk tolerance and developing reliable risk profiles allows for a more comprehensive understanding how Albertans will approach engagement.

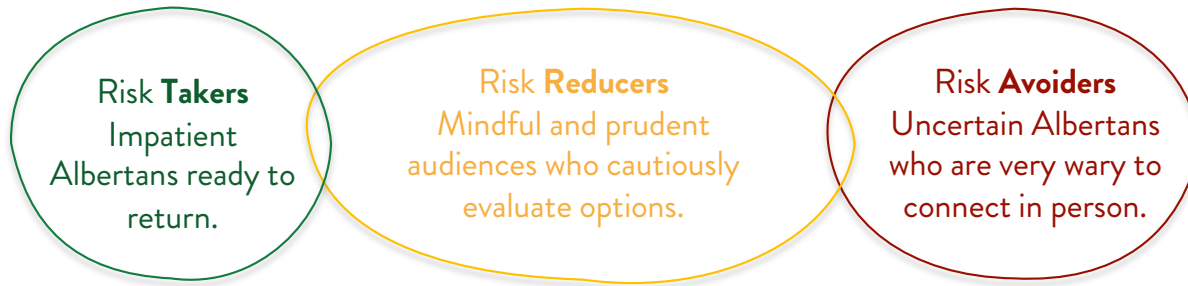
In a COVID environment, risk is multifaceted and outcomes are clear that Albertans are showing more concern for others over themselves. Given the ongoing messaging about the importance of precautions to protect others, it is not surprising that risk tolerances are now incorporating external factors – namely the risk of developing severe health outcomes and infecting others. **This is a community risk instead of a personal risk.**

Why this matters: The benefits you offer and the messaging you broadcast must overcome that broader interpretation of risk. Whereas risk used to be overcome simply by appealing to the motivations of the individual, now we will have to assuage safety/health concerns that impact the people around the individual (i.e. safety measures are not just for you; they are for those around you.)

3.

Engage Albertans based on understanding their risk tolerance

Not everyone views risk the same, nor does everyone have the same capacity for risk. Analysis shows three distinct groups of people based on their tolerance for risk, their capacity risk and their desire for experiences in the face of risk.



Why this matters: Knowing who you can reach, what to offer them and what to say will be critical as organizations plan how to engage audiences in the coming months.

4.

What do audiences need to hear to consider engaging?

Previous iterations of this work emphasized the opportunity to reach Albertans and promote reconnecting. Now that the market is receptive to hearing about experience opportunities, the question is what to tell them. Right now audiences indicate they need to hear the experiences they will have are **safe** and **fun**. These are table stakes – any activity needs to assure safety and comfort but also remind Albertans that it is worth it to participate.

Interesting, unique/new, and different used to be important messages – now less so. People desire comfort and longing for familiarity. It is important to note that this does not lessen the importance of innovating and adapting how you deliver experiences or what is offered. It simply reflects a deeper need to assure them of a safe experience.

Why this matters: This is critical for building confidence and organizations need to reinforce those dual messages of safety/comfort with enjoyment. The weight of each type of message will vary depending on how risk tolerant your audience is.

5.

Capitalize on desire for shared experiences but with a focus on innovation and intimacy.

If safety and fun are now chief requirements for organizations to promote, the desire to be social is still showing up – just in smaller, more intimate forms.

Interest and consideration of specific activities aligns with this. Outcomes reveal Albertans are interested in live, in-person events, but for the most part they need to be smaller and more intimate. People are most comfortable engaging in activities they can do with people they know. Experiences which are outdoor, flexible in their timing, easy and shared within their cohort are also going to get more traction than others.

Why this matters: Audiences need to hear they will be able to have the desired shared experiences but that the experience is safe (for them and their cohort). To balance those needs of social, safety, and fun, organizations will need to develop and continuously reinvent (often many times over) the types of small group offerings that deliver this.

6.

The intersection of cohorts, shared experiences and risk tolerances.

Social motivations are core to the experience economy. People have been drawn to participate in various activities because of the opportunity to share the experience with others. The cohort concept, however, is reshaping how those social motivations are acted upon in this pandemic. 'Cohorts' are not just a label defining social distancing regulations. It is the group Albertans will feel comfortable with; the group they want to protect from infection; and the group they are going to share experiences with.

Analysis on risk tolerances shows about half the market has a moderate risk tolerance and their concerns are mainly rooted in getting their friends/family sick (not exclusively, but mainly). Given everything we've learned about desire for social contact, experiences, comfort, mask wearing (and other precautions), interest in activities and risk, it is important that organizations keep these cohorts in mind because they are helping shape what people will do. Audiences will engage, but appear to be doing so with their cohorts in mind and likely ask themselves:

- Can I share this experience with my cohort?
- If I do this alone, will I put my cohort at risk?

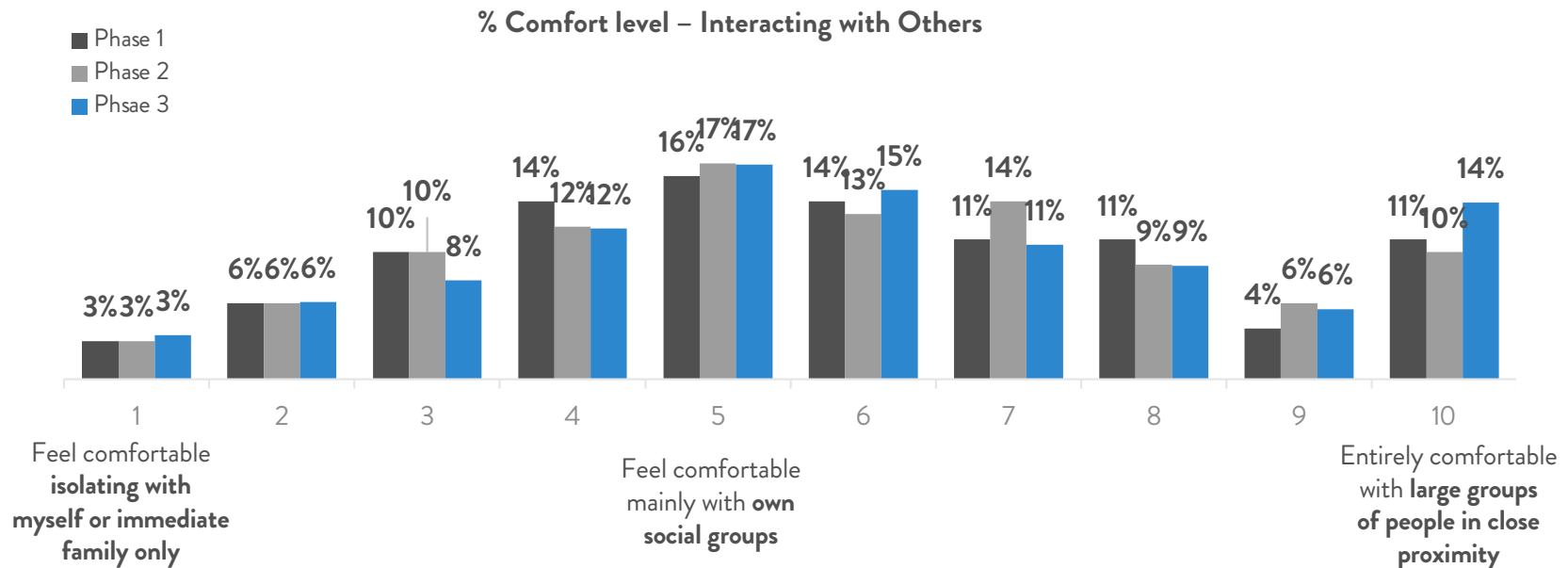
Why this matters: Opportunities exist for organizations in the experience economy to engage Albertans by balancing the notion of cohorts with shared experiences. Show them how to engage with their entire cohort or at least show the activity will not put their cohort at risk.

Comfort levels and consumer mindset



Comfort levels interacting with others are solidifying over time

Even as cases have risen and pandemic-related stories continue to dominate news coverage, Albertans' comfort levels have not yet shifted drastically. Increasing comfort and changing behaviours appears to be something that will occur only over time (as such, a sharp reduction in cases may not mean people will automatically start to return to regular activities. It remains to be seen if sharper increases in cases cause the opposite to be true).

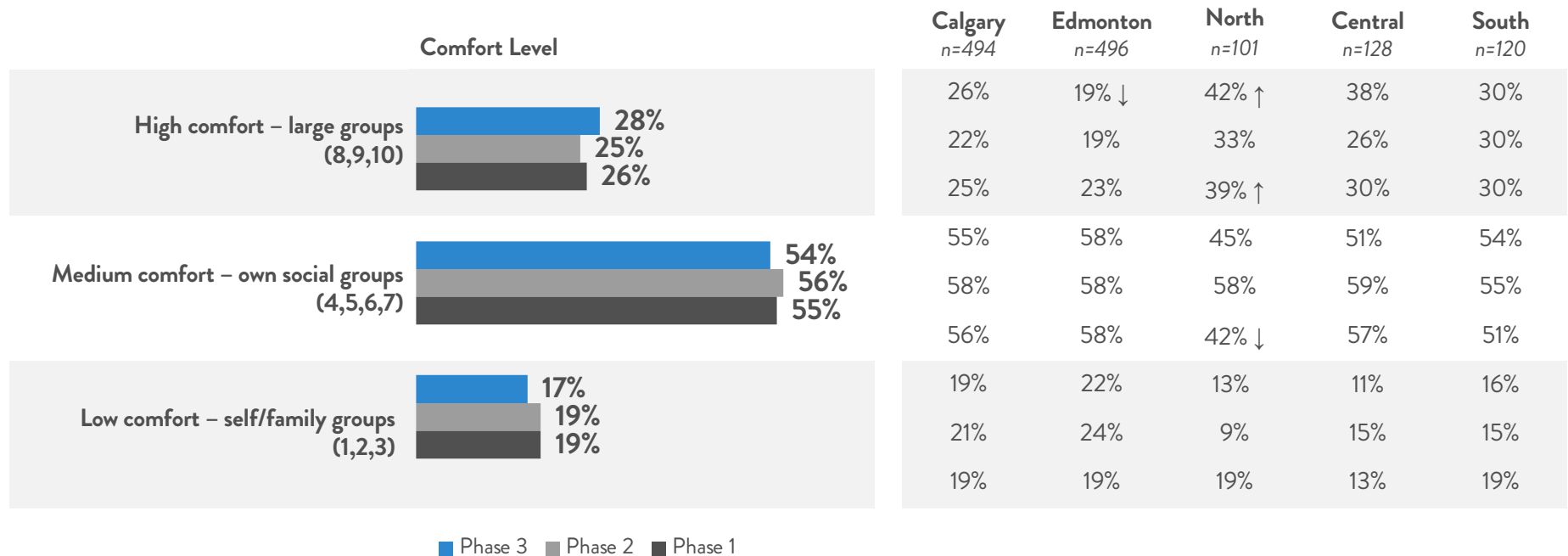


As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community?

Base: Main sample (n=1020)

Yet stark differences in comfort continue to emerge regionally

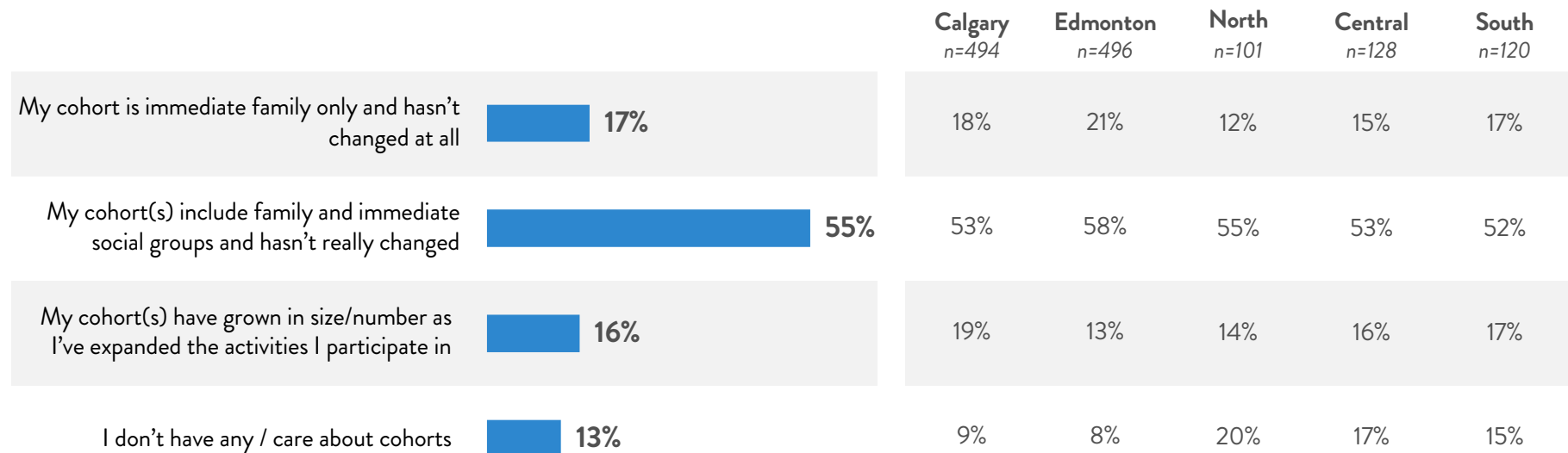
Building on previous themes, regions with more concentrated cases continue to have greater wariness around large groups – this remains notable for the Edmonton region. Rural regions have much higher comfort levels overall.



Which statement best reflects your personal opinion on the current state of re-opening in Alberta?
Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

How Albertans approach cohorts may dictate how they choose to re-engage with activities

The majority of Albertans are sticking close to known groups - family and immediate social groups - and this is likely how they will want to continue to socialize (and therefore influence the types of activities they participate in).

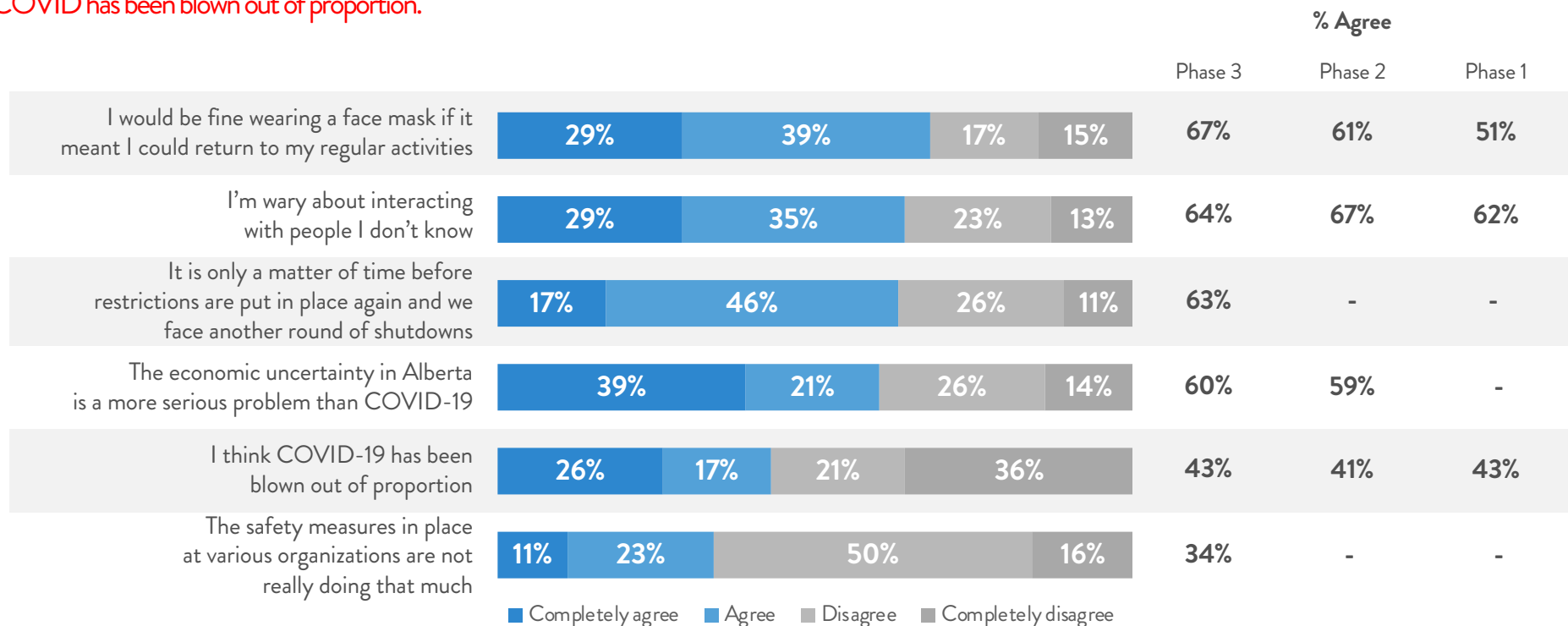


Albertans have been encouraged to consider “cohorts”, or limited groups of people you associate with you to reduce exposure to COVID-19. Which statement best describes how you approach cohorts?

Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

Attitudes show a continued sense of wariness and uncertainty about future restrictions

There is also a growing acceptance of health measures in order to return to activities (face masks), and a steady proportion of those who think COVID has been blown out of proportion.



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=1020).

Attitudes align with risk tolerance levels: those who are more risky are less wary about people and more concerned with economic issues

	% Agree	Total Alberta	Risk Tolerance			Region				
			High n=214	Medium n=560	Low n=246	Calgary n=494	Edmonton n=496	North n=101	Central n=128	South n=120
I would be fine wearing a face mask if it meant I could return to my regular activities	67%		28% ↓	75% ↑	85% ↑	71%	71%	53% ↓	65%	65%
I'm wary about interacting with people I don't know	64%		16% ↓	68% ↑	97% ↑	66%	74% ↑	50% ↓	59%	56%
It is only a matter of time before restrictions are put in place again and we face another round of shutdowns	63%		41% ↓	64%	82% ↑	64%	70% ↑	51% ↓	59%	62%
The economic uncertainty in Alberta is a more serious problem than COVID-19	60%		95% ↑	61%	29% ↓	60%	50% ↓	76% ↑	69%	63%
I think COVID-19 has been blown out of proportion	43%		95% ↑	38% ↓	7% ↓	39%	33% ↓	59% ↑	49%	51%
The safety measures in place at various organizations are not really doing that much	34%		64% ↑	27% ↓	22% ↓	31%	32%	37%	34%	41%

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=1020). Note: Calgary + Edmonton include supplemental sample

Age and gender also reveal stark differences: Males between 35-54 continue to demonstrate unique attitudes (more blasé, more concerned about economic uncertainty). There are also differences among younger groups: both males and females show greater social acceptance towards mask wearing but females tend to be more wary overall.

	% Agree	Total Alberta	Female			Male		
			18-34 n=160	35-54 n=172	55+ n=170	18-34 n=153	35-54 n=192	55+ n=166
I would be fine wearing a face mask if it meant I could return to my regular activities		67%	81% ↑	69%	69%	76% ↑	53% ↓	64%
I'm wary about interacting with people I don't know		64%	80% ↑	70%	70%	67%	43% ↓	60%
It is only a matter of time before restrictions are put in place again and we face another round of shutdowns		63%	72% ↑	63%	63%	68%	57%	61%
The economic uncertainty in Alberta is a more serious problem than COVID-19		60%	42% ↓	56%	63%	48% ↓	75% ↑	71% ↑
I think COVID-19 has been blown out of proportion		43%	26% ↓	35%	36%	41%	63% ↑	49%
The safety measures in place at various organizations are not really doing that much		34%	34%	29%	28%	37%	43% ↑	33%
Connection to COVID-19 (direct or indirect)		45%	62%	55%	32%	53%	43%	30%

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=1020).

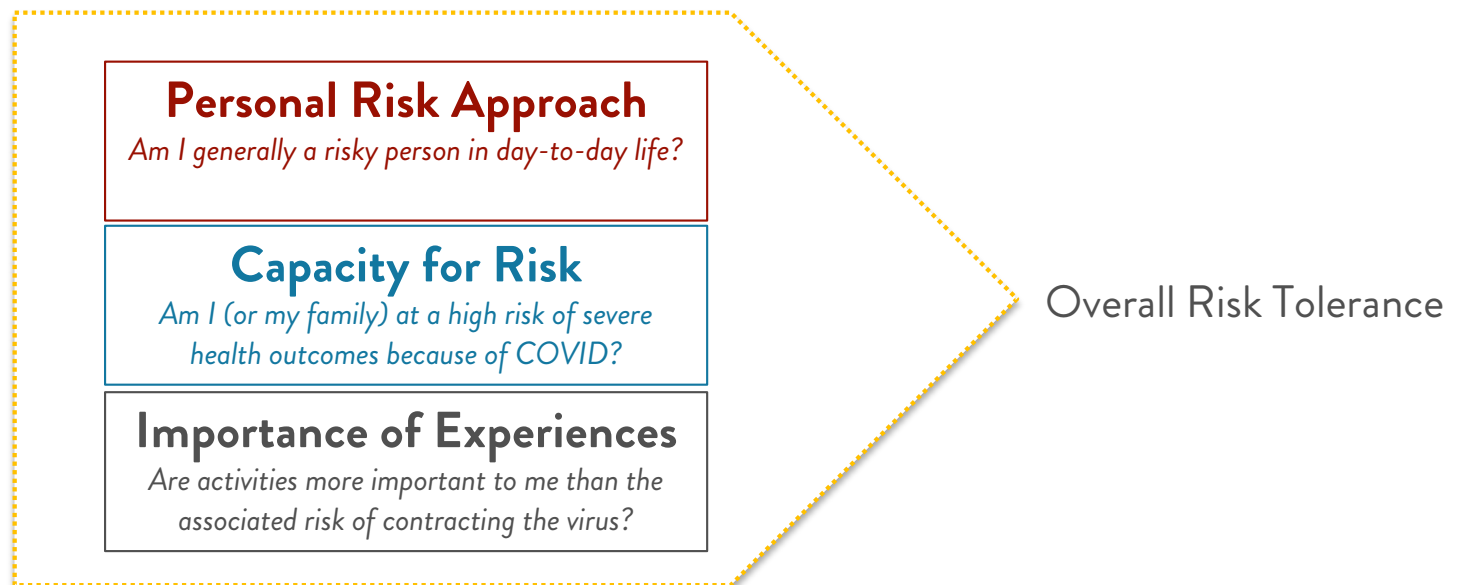
How to consider risk?



Why is understanding risk important?

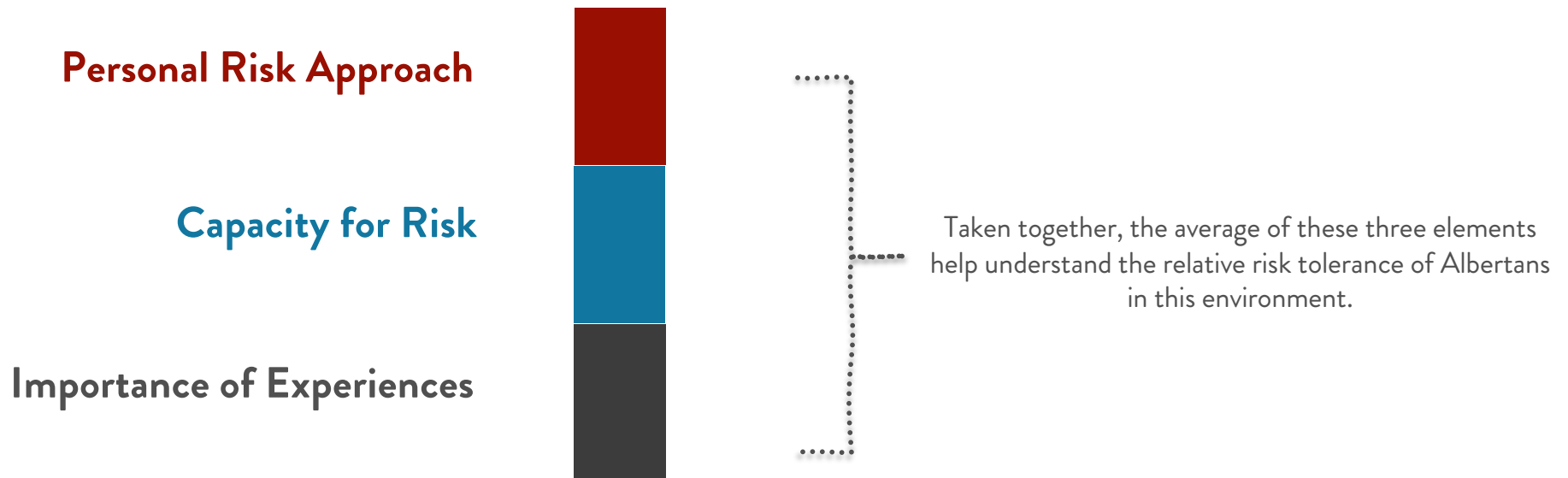
The complexity surrounding COVID-19 (with patchwork of policies, availability of activities, and public health guidelines) has demonstrated that comfort and desire cannot be used in isolation to understand intentions to participate in activities. Assessing risk tolerance becomes important, especially as the pandemic environment becomes more dynamic over time.

Understanding your audiences overall tolerance for risk in the current environment can be useful for a range of planning and engagement efforts; telling you what they are likely to want to do, the types of situations they are likely to be comfortable in, and what you need to say to connect with them. But risk tolerance in a pandemic environment is more than just knowing if a person is risky generally or not. It must include their health risks – or their capacity for risk - and the trade-offs they consider when pursuing experiences.



How can we measure and apply it?

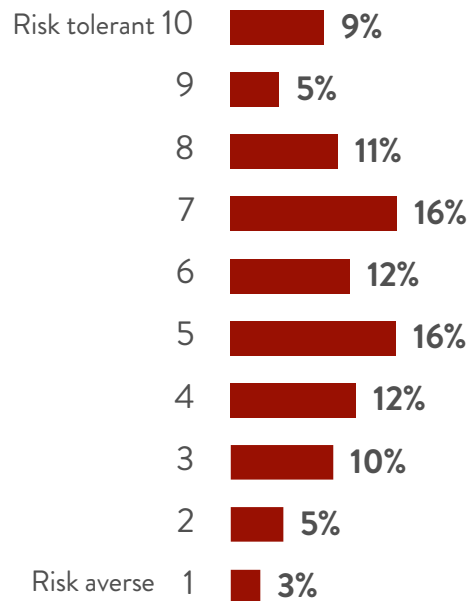
Because risk is multi-dimensional, understanding risk tolerance in the current environment needs to take into account each individual's day-to-day risk tolerance, their capacity for risk in this pandemic and the importance of experiences they pursue. This risk index models those three elements for each respondent and then groups them based on their individual risk assessment. Each element is measured individually on a 10-point scale.



How do Albertans consider risk across three categories?

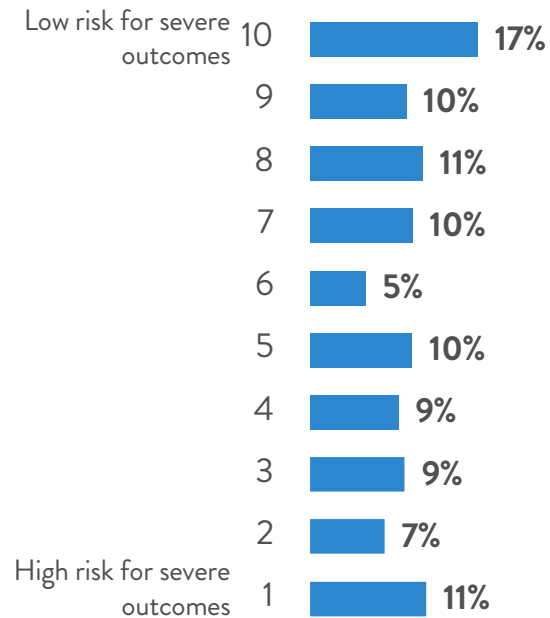
Personal Risk Approach

An overall look into day-to-day life



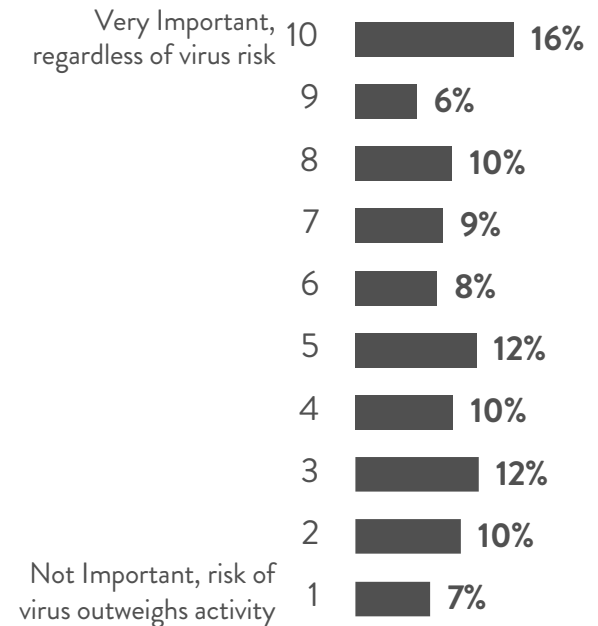
Capacity for Risk

The risk of severe health outcomes



Importance of Experiences

Priority of activities vs. virus risk



In general, how would you consider your individual level of risk tolerance in day-to-day life?

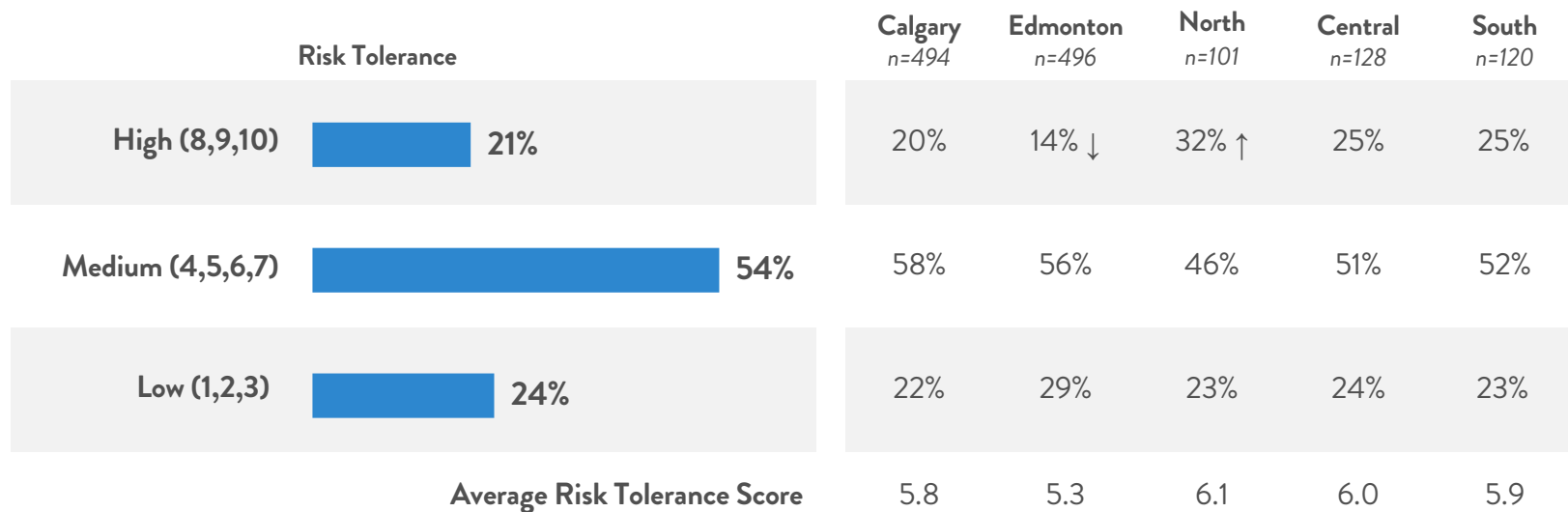
How would you rate your risk of disease with respect to COVID-19?

Now thinking about the activities you participate in and value most, how would you assess their overall importance?

Base: Main sample (n=1020).

At a macro level, the majority of Albertans are in the medium-risk category

But similar to comfort, there are distinct regional differences: rural regions (particularly North) are much more risk tolerant compared to urban centres.



Calculated as an average across dimensions. Only 35% of Albertans are exclusive in their risk category. The remaining 65% shift their definition of risk depending on each category assessed.

C4/C5/C6 AVERAGE RISK TOLERANCE

Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

What does risk look like? The greatest concern is getting someone else sick

The concern with others highlights the tension that remains between people wanting to engage and participate in activities and the need to continue practice health measures. Risk in a COVID environment is more about others than the individual.

Top Concerns related to COVID:		Calgary n=494	Edmonton n=496	North n=101	Central n=128	South n=120
Getting friends/family sick	70%	73%	77%	56% ↓	67%	64%
Getting sick myself	54%	54%	62% ↑	45%	46%	42% ↓
Getting somebody I don't know sick	47%	44%	56% ↑	42%	48%	42%
Risk of complications/death	46%	45%	55% ↑	40%	41%	35% ↓
Having to isolate/pause activities for a period of time	36%	36%	37%	35%	31%	40%
Causing others to isolate/miss activities	35%	36%	40% ↑	33%	26%	28%
Contribute to shutdown of school/activity	30%	29%	34%	29%	32%	26%
Hassle of testing process	23%	22%	24%	25%	19%	23%
None of these	13%	9%	11%	20%	18%	13%

When you think about the risks that you might have to take to participate in your usual activities, what concerns you the most? Please select all that apply.

Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

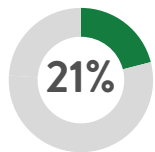
Risk assessment does show disparities by age and gender.

Regardless of age and gender, getting friends or family sick remains a top concern. However, males between 35-54 have fewer associated concerns overall. Younger groups also show a broader range of worries.

		Female			Male		
	Total Alberta	18-34 n=160	35-54 n=172	55+ n=170	18-34 n=153	35-54 n=192	55+ n=166
Average risk tolerance score:	5.8	5.3 ↓	5.5	5.2 ↓	6.1	6.7 ↑	5.7
Concerns related to COVID:							
Getting friends/family sick	70%	86% ↑	72%	69%	78%	56% ↓	66%
Getting sick myself	54%	55%	54%	64% ↑	54%	36% ↓	60%
Getting somebody I don't know sick	47%	62% ↑	49%	48%	57% ↑	35% ↓	38% ↓
Risk of complications/death	46%	55% ↑	50%	52%	44%	31% ↓	45%
Having to isolate/pause activities for a period of time	36%	43%	43%	30%	46% ↑	33%	25% ↓
Causing others to isolate/miss activities	35%	44% ↑	37%	34%	41%	33%	20% ↓
Contribute to shutdown of school/activity	30%	43% ↑	32%	31%	35%	31%	13% ↓
Hassle of testing process	23%	26%	27%	23%	27%	20%	14% ↓
None of these	13%	5% ↓	7% ↓	11%	10%	22% ↑	17%

When you think about the risks that you might have to take to participate in your usual activities, what concerns you the most? Please select all that apply.
Base: Main sample (n=1020).

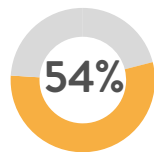
How can we think about audiences in terms of their risk tolerances?



Risk Takers

9.0 AVERAGE RISK SCORE

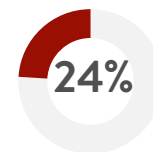
Risk Takers are most comfortable in large groups, and more skeptical about safety measures being implemented. Their household income has been disproportionately impacted in recent months and they have the lowest personal connection to COVID – all which influence their sense of apathy and frustration at being denied their usual activities.



Risk Reducers

5.9 AVERAGE RISK SCORE

Represents the majority of Albertans. Their assessment of risk may change depending on who is involved and how much they value an activity. They are mindful of their comfort levels and are prudent in their approach to choosing activities. Socialization is important to them but so is safety.

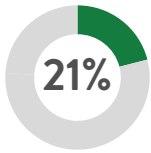


Risk Avoider

2.8 AVERAGE RISK SCORE

Risk Avoiders are most likely to be interacting with immediate family only, have a high level of wariness, and are most likely to anticipate future lockdowns. They tend to be slightly higher risk of severe outcomes (related to COVID) and have a high concern about getting others sick.

A more detailed profile of each risk group is outlined on the following pages. These profiles should be used to deepen the understanding audiences and inform efforts to engage them.



Risk Takers

Frustrated, impatient, but eager to return.

This group is frustrated that they're being denied activities. They want to be reminded of pre-pandemic times and are looking for an escape or something to take their mind of the pandemic. Their assessment of community risk is economic over health. Messaging should be sensitive to this.

INTERESTS:



Active. High participation in organized and individual sports, community festivals.

DEMOGRAPHICS:



Skew male (65%), higher proportion of rural residents.



Highest proportion of families (36%)

What do they think?

Economic uncertainty is a more serious problem than COVID-19 (95%)

COVID-19 has been blown out of proportion (95%)

Safety measures in place at organizations are not doing much (64%)

Risk concerns?

No major concerns. 34% concerned about having to self-isolate, 28% concerned about getting friends or family sick.

How will they engage?

97% Interested in Re-engaging



96% In-person activities



21% Virtual activities



- Live in person without any restrictions or crowd limits (69%)
- Live in person larger crowds but some restrictions in place (37%)
- Live in person, smaller crowds with strict restrictions (17%)

How to reach them?

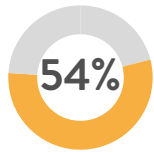
Messages should communicate an **escape** or **social** component:



Is fun (47%)

Allows you to be with people you know and some you don't (34%)

Allows you to be active (31%)



Risk Reducers

Mindful and prudent. Eager but cautious. Weighing options.

While they have concerns, they are still eager to return to activities. This is a group that takes safety seriously so they are prudent and thoughtful in how they choose activities. They look for things they can do with cohorts while still feeling safe and secure.

INTERESTS:



Highest attendance at concerts, live shows, festivals.

DEMOGRAPHICS:



Even gender split but skew slightly younger (29% under 35).

What do they think?

Will wear facemask to return to activities (75%)

Wary about interacting with people I don't know (68%)

I don't care if my activities are modified or scaled back, I'm just happy to participate (61%)

Nervous to resume activities but am going to do it anyway (35%)

Risk concerns?

Mostly concerned with getting friends/family sick (76%). Fewer (58%) concerned about getting themselves or a stranger (51%) sick.

How will they engage?

91% Interested in Re-engaging



87% In-person activities



50% Virtual activities



- Live in-person, smaller crowds with strict restrictions (46%)
- Live in-person, with only people I know/cohorts (45%)
- Live digital, watching only (37%); Recorded, participate on own time (37%)

How to reach them?

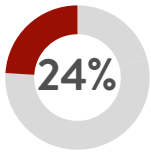
Messages that communicate **it will be worth the risk** will resonate most:



Is safe (49%)

Is fun (39%)

Provides stress relief (26%); Supports the community (26%)



Risk Avoiders

Safety is a top concern for this group. Their appetite for social activities is tempered by their uncertainty and low comfort. However, they are more likely to listen closely to organizations who offer digital options.

INTERESTS:



Galleries, theatre, heritage festivals, and workshops

DEMOGRAPHICS:



Skew female (57%) and are older (30% over 65).

Nervous, uncertain, and apprehensive to return.

What do they think?

Wary about interacting with people I don't know (97%)

Will wear facemask to return to activities (85%)

The more I hear about COVID, the less I want to do activities outside my home (81%)

Only a matter of time before another lockdown (82%)

Risk concerns?

Most concerns overall – highly worried (92%) about getting family/friends sick. Also worried about their own health (85%) and their own mortality (80%).

How will they engage?

82% Interested in Re-engaging



66% In-person activities

70% Virtual activities

- Live digital, watching only (53%)
- Recorded, participate on own time (52%)
- Live in-person, with only people I know/cohorts (51%)

How to reach them?

Messages that communicate **safety measures** or **calming comfort** will resonate most:



Is safe (71%)

Allows you to be with only people you know (34%)

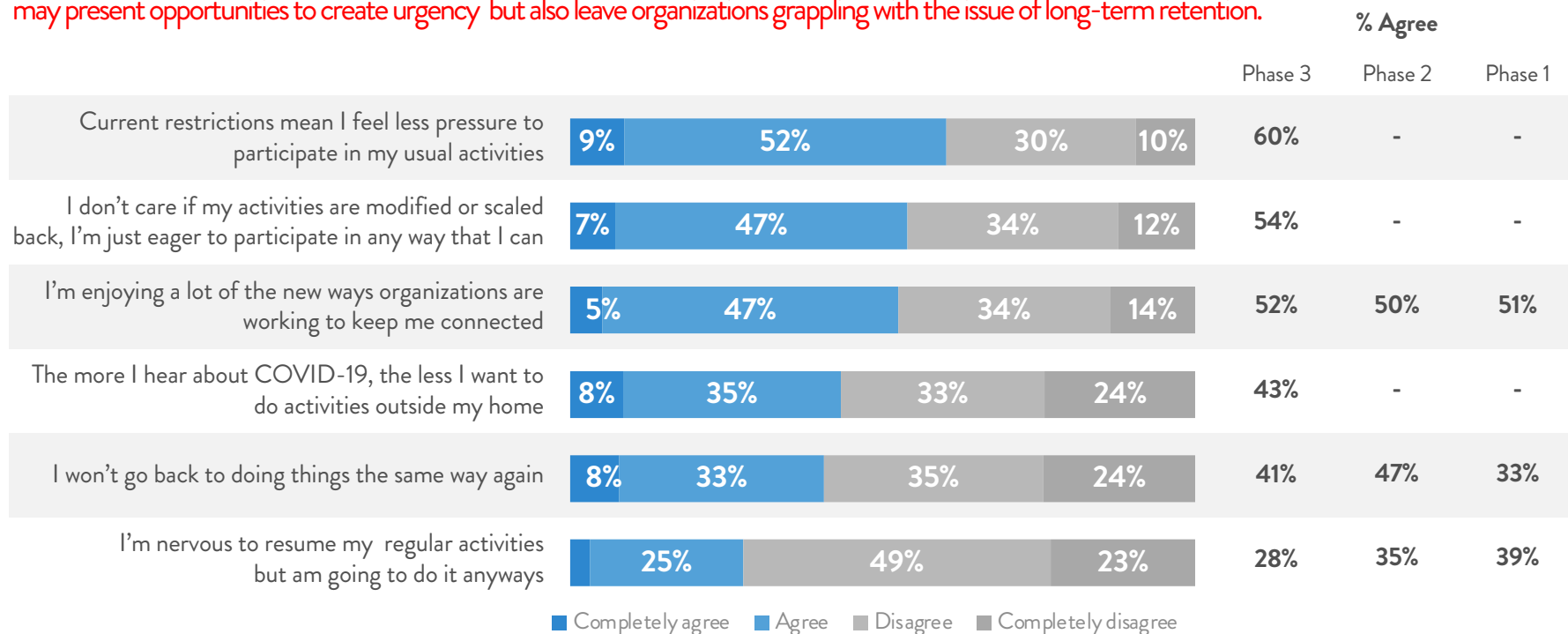
Provides stress relief (25%)

A photograph of a theater interior with rows of red seats. A person is sitting in the middle of the seats, and the text "What are attitudes towards engagement?" is overlaid on the image.

**What are attitudes towards
engagement?**

As restrictions impact availability of activities, many Albertans feel less pressure to engage

Restrictions may have had the unintended side effect of reducing social pressures that Albertans feel to participate in multiple activities. This may present opportunities to create urgency but also leave organizations grappling with the issue of long-term retention.



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=1020).

Lack of social pressure is strongest among those who are less risky.

Those who are less risk tolerant are also more likely to be enjoying new ways organizations are staying connected and have a stronger sense that things will not be returning to normal again.

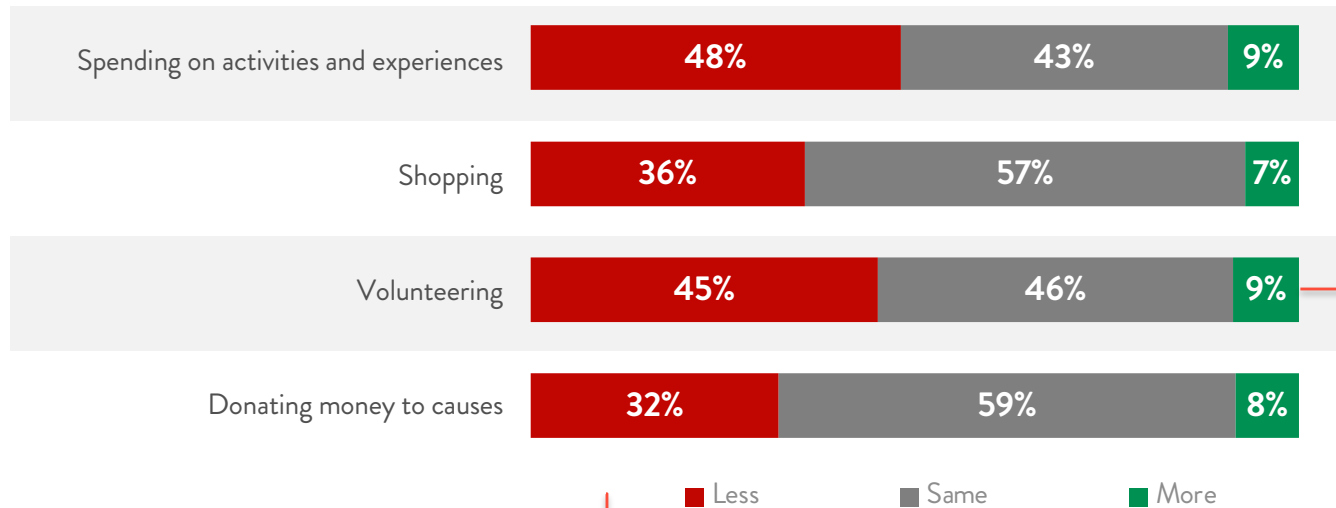
	% Agree	Total Alberta	Risk Tolerance			Region				
			High n=214	Medium n=560	Low n=246	Calgary n=494	Edmonton n=496	North n=101	Central n=128	South n=120
Current restrictions mean I feel less pressure to participate in my usual activities		60%	33% ↓	62%	79% ↑	65%	63%	52%	57%	54%
I don't care if my activities are modified or scaled back, I'm just eager to participate in any way that I can		54%	49%	61% ↑	42% ↓	57%	50%	54%	56%	52%
I'm enjoying a lot of the new ways organizations are working to keep me connected		52%	25% ↓	58% ↑	64% ↑	55%	56%	45%	51%	53%
The more I hear about COVID-19, the less I want to do activities outside my home		43%	6% ↓	41%	81% ↑	44%	52%	31% ↓	36%	35%
I won't go back to doing things the same way again		41%	8% ↓	40%	69% ↑	41%	49%	28% ↓	34%	40%
I'm nervous to resume my regular activities but am going to do it anyway		28%	20% ↓	35% ↑	18% ↓	26%	26%	29%	31%	25%

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=1020). Note: Calgary + Edmonton include supplemental sample

Expectations will need to be adjusted– there is a smaller appetite for volunteering and softer willingness to donate

Next 3-6 months...



Volunteers in the sports/rec and charity sectors are more likely to say they will maintain their same level of volunteering. Arts/culture volunteers are more likely to see a reduction, perhaps due to a reduction in opportunities.

The biggest reduction in donations is likely to come from those 35-54 years and those with children – this is the same group that is disproportionately impacted by economic pressures.

Looking ahead to next 3-6 months, do you expect you will do more or less of the following?

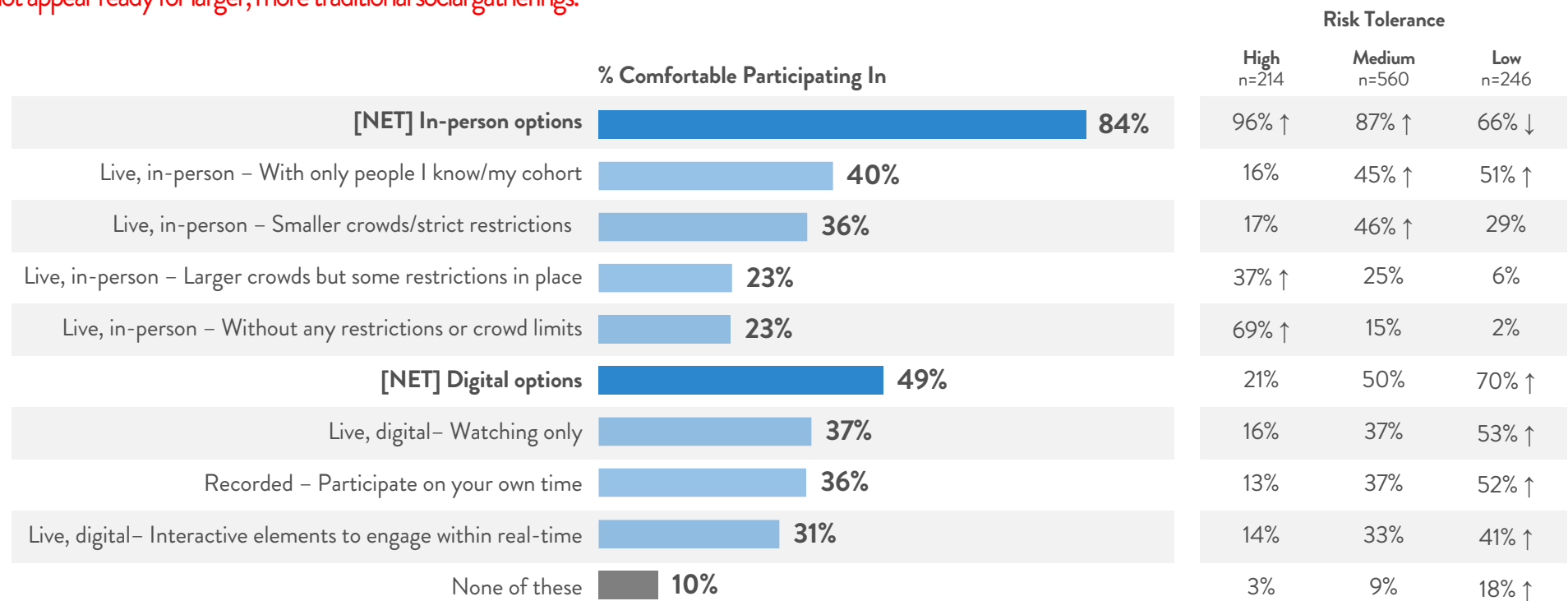
Base: Rebased – Among those who do the activity (n=varies)

A woman with blonde hair, wearing a dark jacket and teal pants, is walking away from the camera on a path. She is holding the hand of a young child who is wearing a teal sweater and dark pants. They are walking through a forest with trees that have yellow and orange autumn leaves. The ground is covered with fallen leaves. The text "Assessing Activity and Programming Options" is overlaid on the image in a large, white, sans-serif font.

Assessing Activity and Programming Options

In-person events have appeal but there is a strong preference for own cohort or small crowds

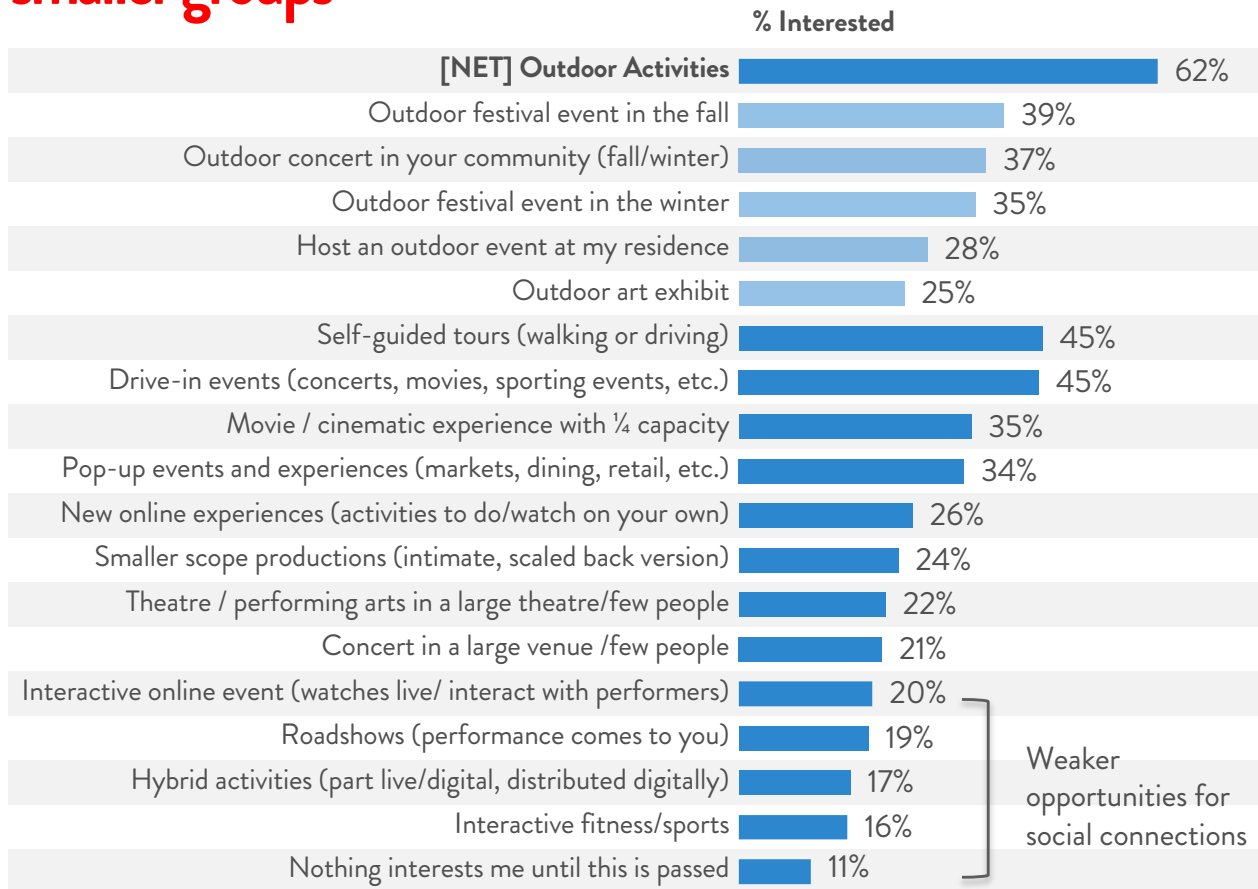
Shared experiences with others fulfill the desire for social interactions in a way that digital options cannot. The caveat is that most Albertans do not appear ready for larger, more traditional social gatherings.



We'd like you to think ahead to 2021. Imagine restrictions have loosened and people can attend events, participate in more activities, and do more of the things they used to do *but nothing else has changed*. What kinds of event would you be most comfortable participating in?

Base: Main sample (n=1020).

Interest focuses on outdoor and activities that can be enjoyed with smaller groups

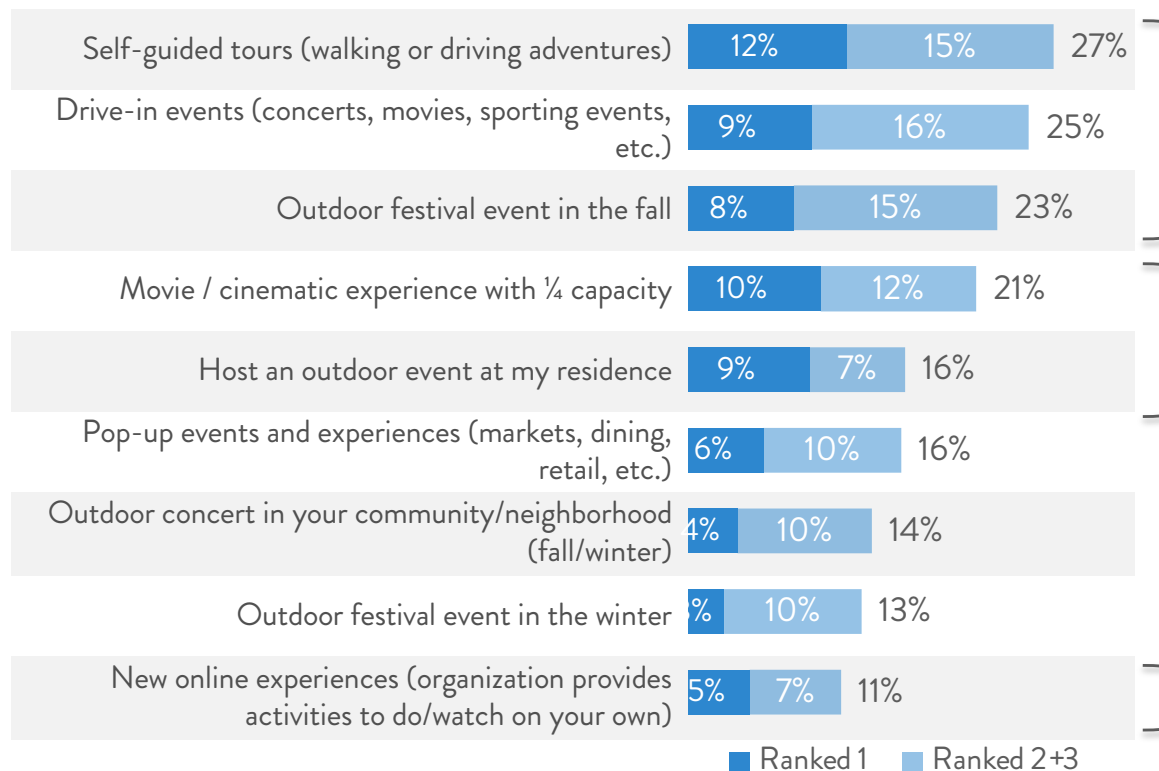


Outdoor may need to take a higher priority as cases rise in the immediate term.

Below are a number of different types of activities. Assuming these were offered by an organization that you knew and engaged with regularly, which ones are you interested in?
Base: Main sample (n=1020).

Self-guided tours, drive-in events and festivals are the types of activities that Albertans are most likely to consider and share similar characteristics

Consideration – Ranked Top 3



Top activities are broad-based and allow for flexibility in how events are designed. Shared characteristics include:

- Ease – Simplicity to know about and do
- Timing – Allows it to be done on own time at own pace
- Safe – Follows safety measures, including social distancing
- Social – Includes a social element, but staying within groups
- Shared – Includes a shared experience to talk about and enjoy

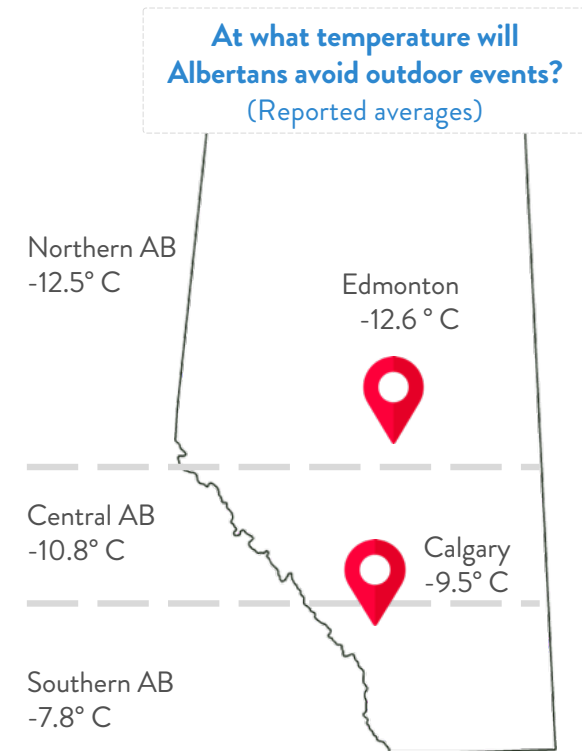
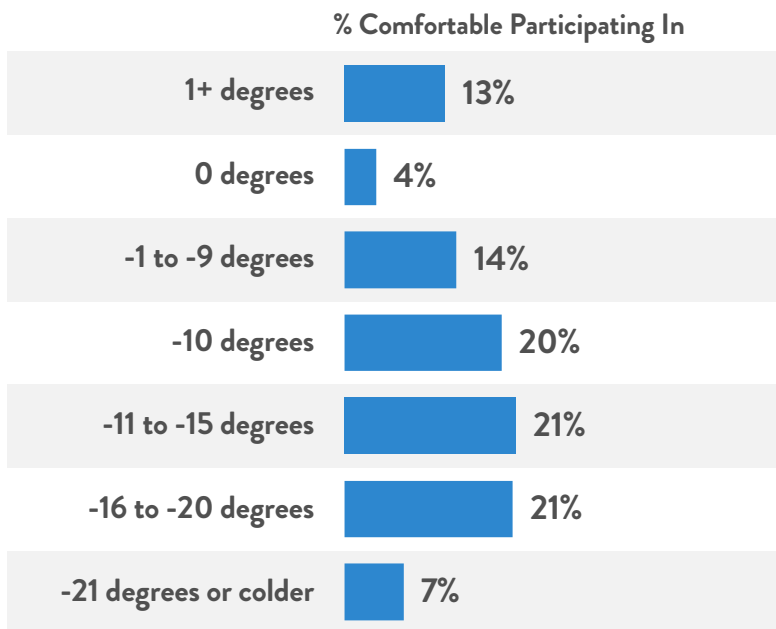
Traditional events with limited capacity have moderate appeal. There is a limit to how successfully they can be modified without larger crowds.

Online options still have some appeal, but engagement will be limited and focused among certain groups

Of the items you selected, we would like to understand which activities you would actually consider doing. Please rank up to 3 activities you would participate in...
Base: Main sample (n=1020).

How cold is too cold?

Albertans are willing to go outside (62% have an interest in outdoor activities for fall/winter). While it varies regionally, Albertans will consider attending an outdoor activity if the temperature is -10°C (provincial average).

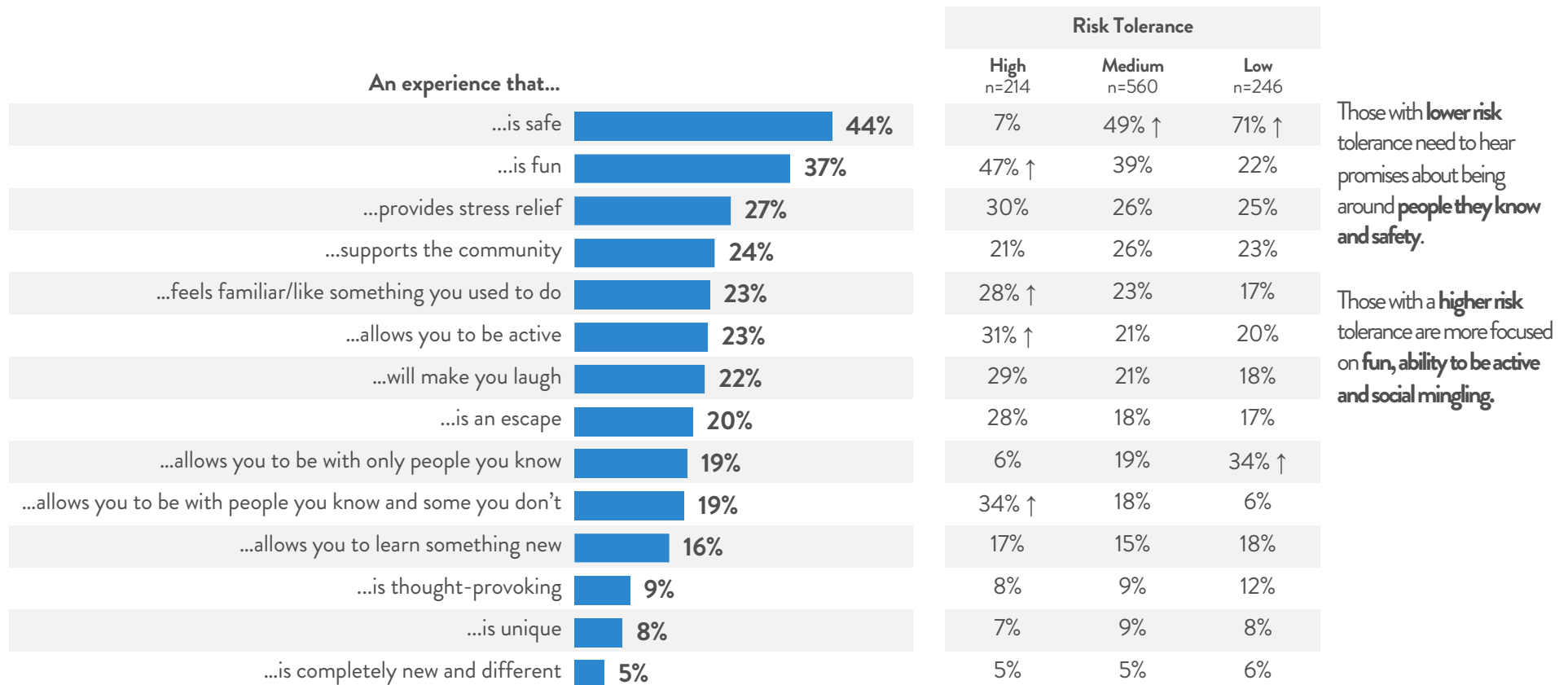


You said you are interested in outdoor events. At what temperature is it too cold for you to consider going to an outdoor event/activity?

Base: Interested in outdoor activities (n=635)

Promises should focus on safety, fun, and escapism.

All groups would most benefit from messages related to safety and fun. Instead, risk tolerance drives the intensity of message breakthrough.



Again thinking of an organization that you knew and engaged with regularly, what could that organization say to you or promise about experiences they offer, in order for you to feel confident in returning to your activities?

Base: Consider at least one activity (n=914)

Respondent Profile



Profile of Key Characteristics:

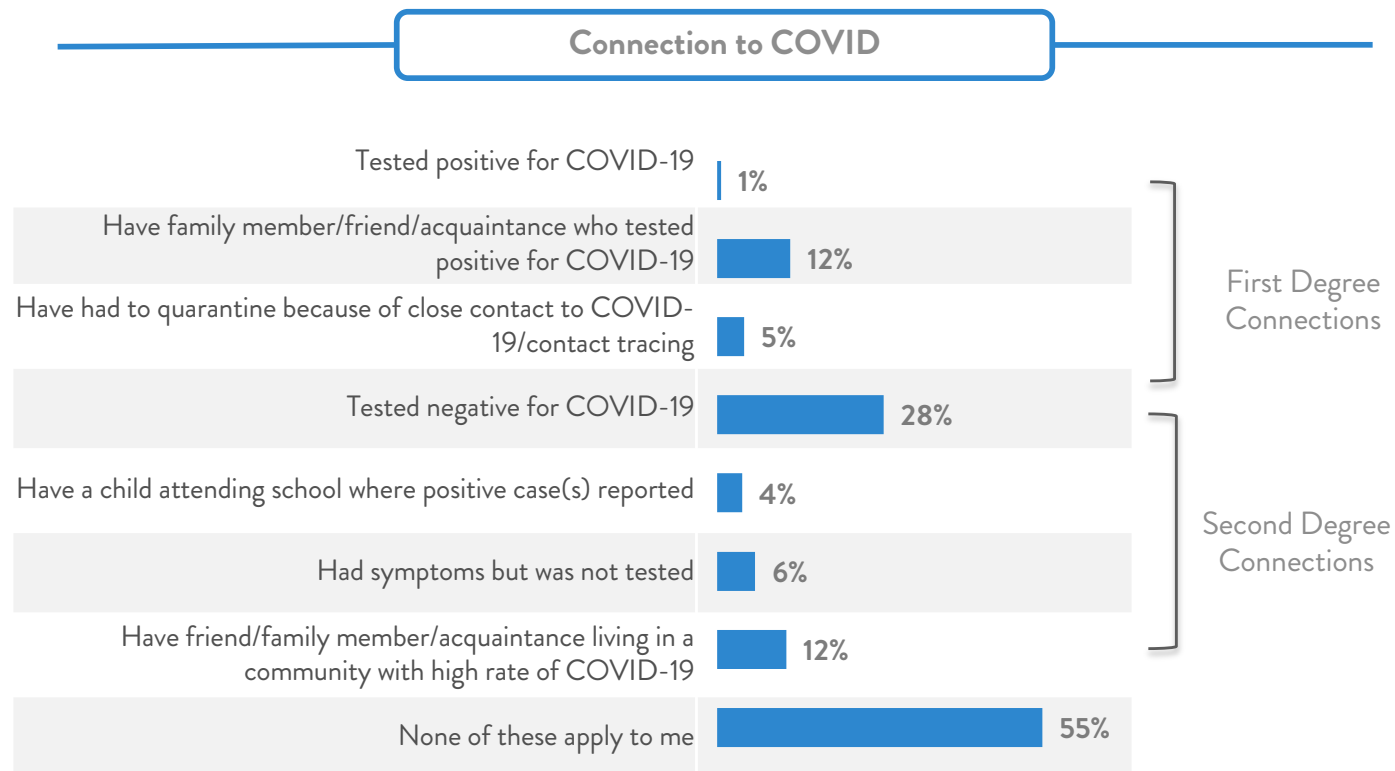
Volunteer Profile

Past Year...		Calgary n=494	Edmonton n=496	North n=101	Central n=128	South n=120
Yes, volunteered past year	<div><div></div></div> 46%	43%	41%	51%	49%	50%
Charity/non-profit	<div><div></div></div> 30%	28%	26%	34%	30%	34%
Sports/rec	<div><div></div></div> 11%	8%	10%	15%	13%	8%
Festivals	<div><div></div></div> 4%	3%	4%	3%	4%	3%
Something else	<div><div></div></div> 13%	11%	11%	11%	17%	17%
Non-volunteer (past year)	<div><div></div></div> 54%	57%	59%	49%	51%	50%

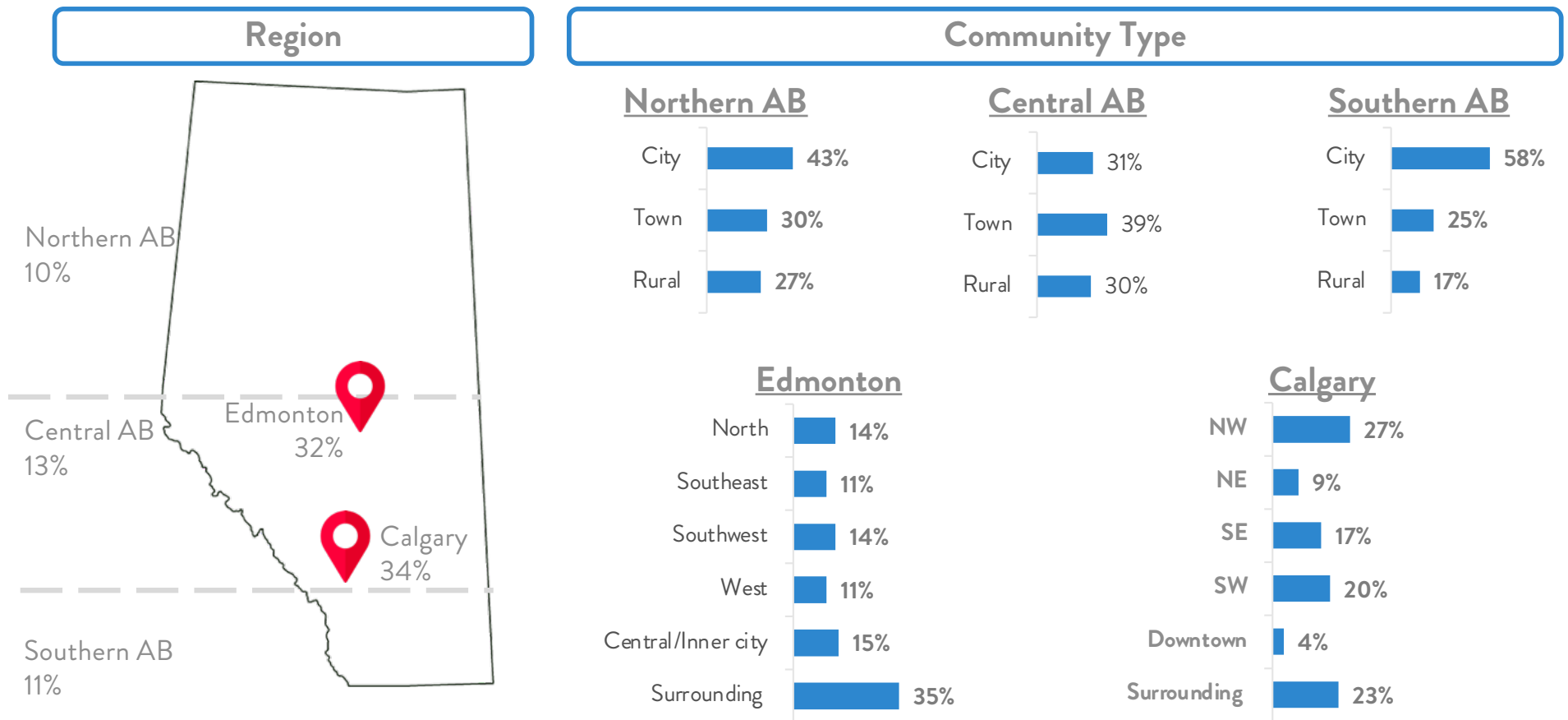
Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

Profile of Key Characteristics:

45% of Albertans have a connection to COVID-19 – either directly (positive test, known contact or quarantining) or indirectly (symptoms, school cases, etc.).



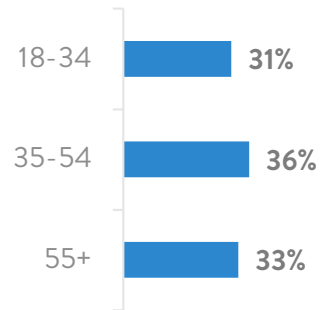
Who we heard from



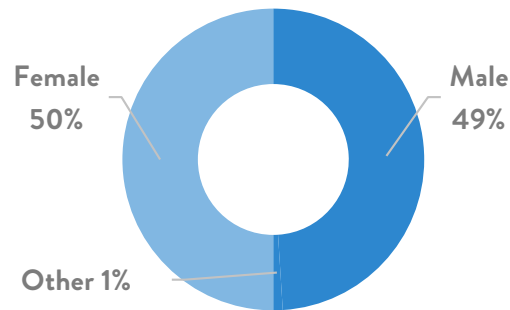
Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

Who we heard from

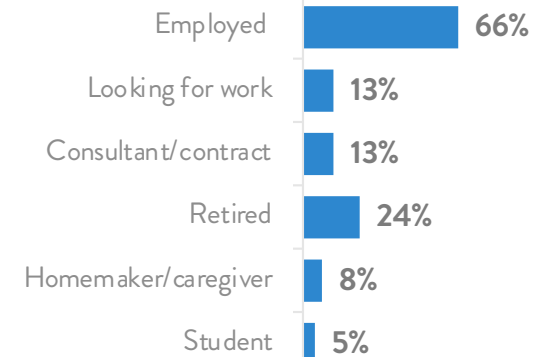
Age



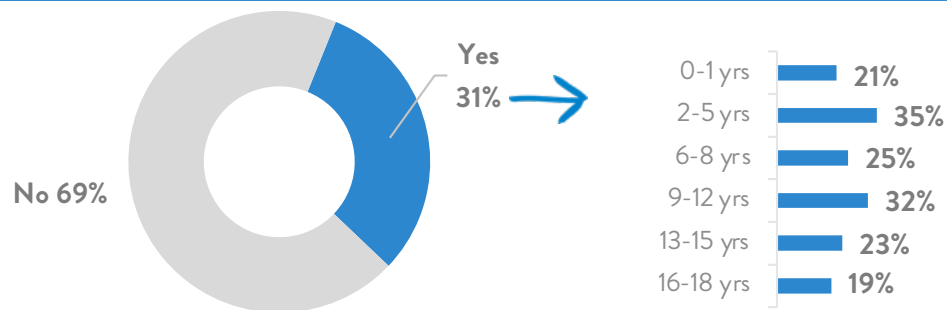
Gender



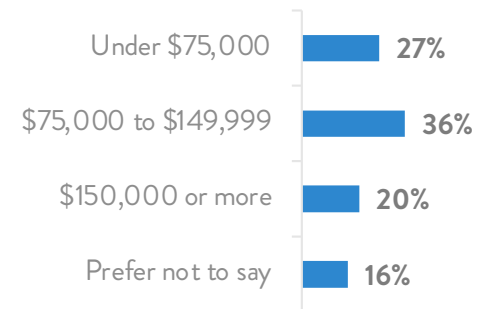
Employment



Children in the Household



Household Income



Base: Main sample (n=1020). Note: Calgary + Edmonton include supplemental sample

**Stone —
Olafson**

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