



# The NEW Experience Economy:

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

Phase 3 Results: Calgary  
November 2020

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# 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.

## How to use this report:

This report will focus on outcomes from Calgary respondents only. The purpose of this report is to provide a supplementary perspective of the Calgary market specifically, for organizations who operate in the region. A total of 494 Calgary-specific surveys were collected (342 base surveys, 152 boost) from October 5<sup>th</sup> to 16<sup>th</sup>.

It should be noted that the implications from the full report remain applicable to each individual market. The full (province-wide) results are available at:

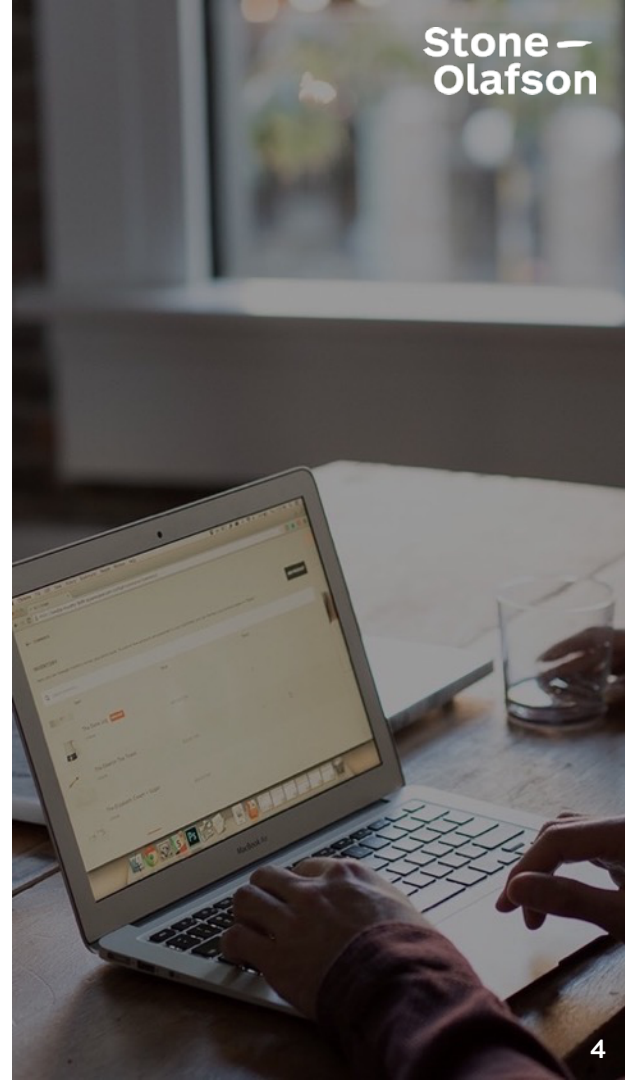
[www.stone-olafson.com/insights](http://www.stone-olafson.com/insights)

*Please note:*

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

*Throughout the report, arrows are used to indicate 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 +/- 4.4%, 19 times out of 20.*



# What is different in Calgary? This phase of research shows Calgarians closely mimic their fellow Albertans.

1.

## Risk and cohorts dictate re-engagement

Risk before the pandemic was probably more of an individual assessment, but that has changed. Risk is now more about others.

Calgarians, and Albertans, evaluate experiences based on the impact it may have on their cohorts.

With comfort levels appearing to be cementing, risk tolerance provides a richer understanding of engagement.

Benefits and messages must overcome the interpretation of risk.

2.

## There is interest for in-person and digital

In-person activities are desired, but with a focus on sharing experiences with a smaller, more intimate, groups.

Appetite also remains for digital, but more for those with a lower risk tolerance. Digital experiences also need to be reinvented to continue to hold interest and have social elements.

Show them how to engage with their cohort, whether it's safely in-person or a digital experience they can share.

3.

## Messaging needs to emphasize safety & fun

Any activity needs to assure safety and comfort but also reminded that it'll be worth it to participate.

With the feeling of social pressures lifting during this time, many are taking the time to select what they want to do. Hearing the right messages will help breakthrough.

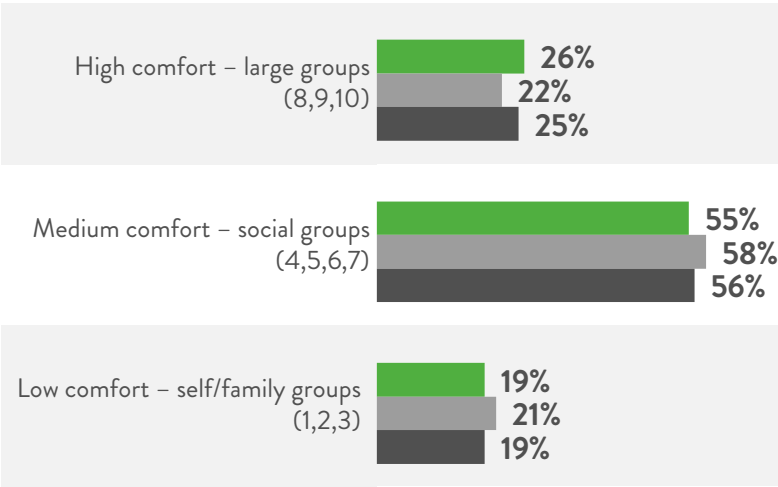
The weight of each type of messaging will vary depending on how risk tolerant the audience is.

# Comfort levels and consumer mindset



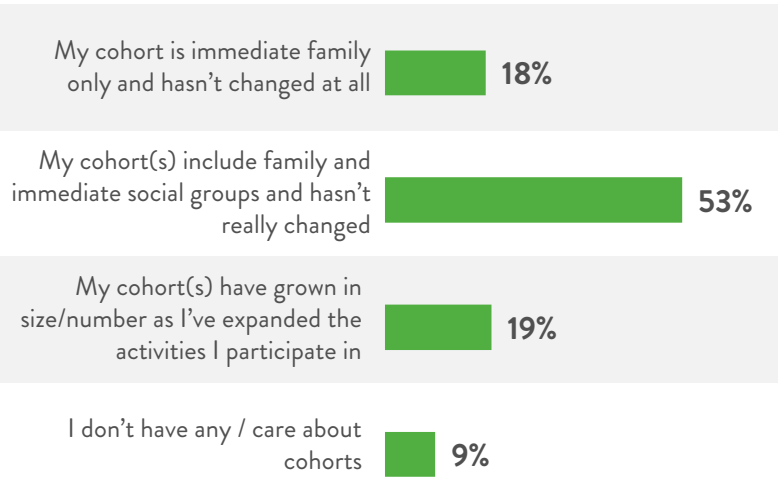
# Comfort levels are cementing over time and cohorts dictate how Calgarians will re-engage in activities

Comfort Level



■ Phase 3   ■ Phase 2   ■ Phase 1

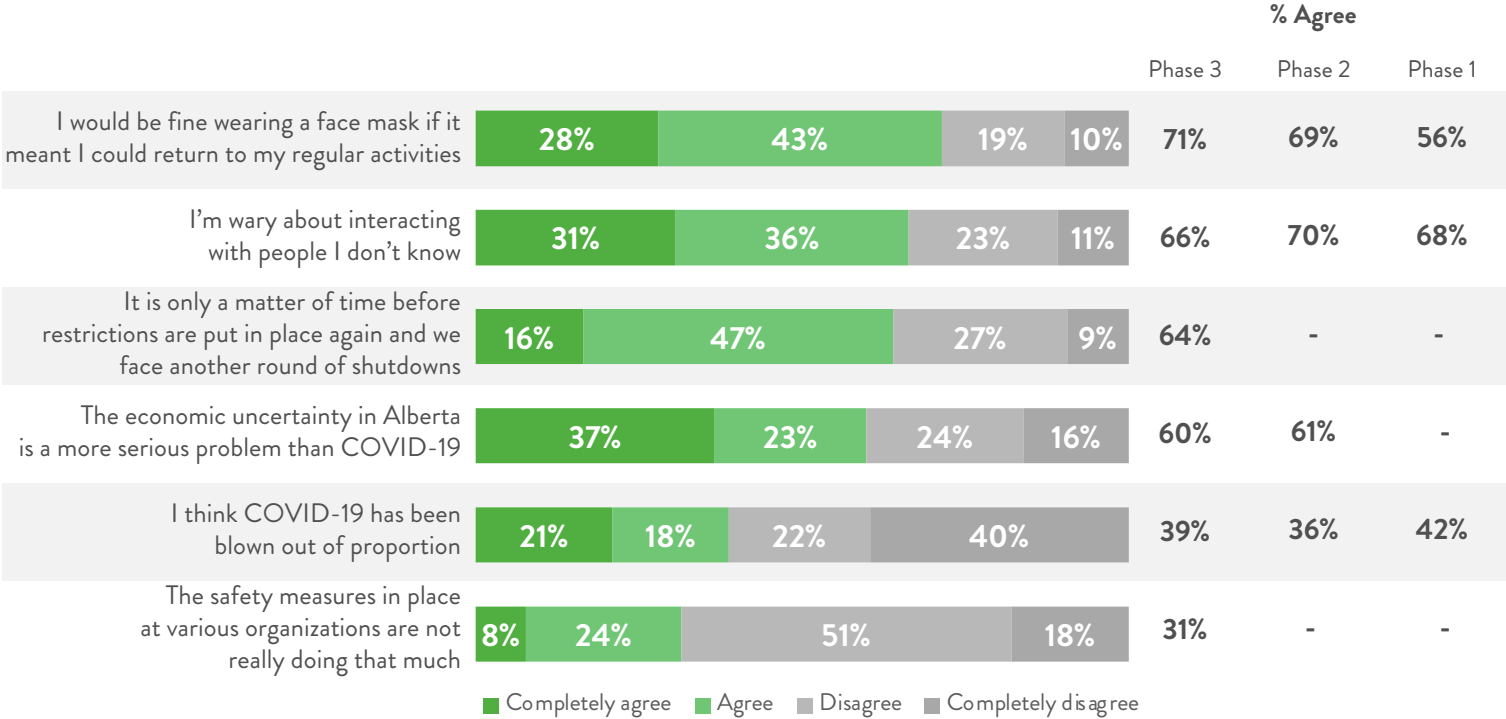
Cohort Consideration



Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community? 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: Calgary (n=494)

# Calgarians continue to show a sense of wariness and expectation for future restrictions



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: Calgary sample (n=494)



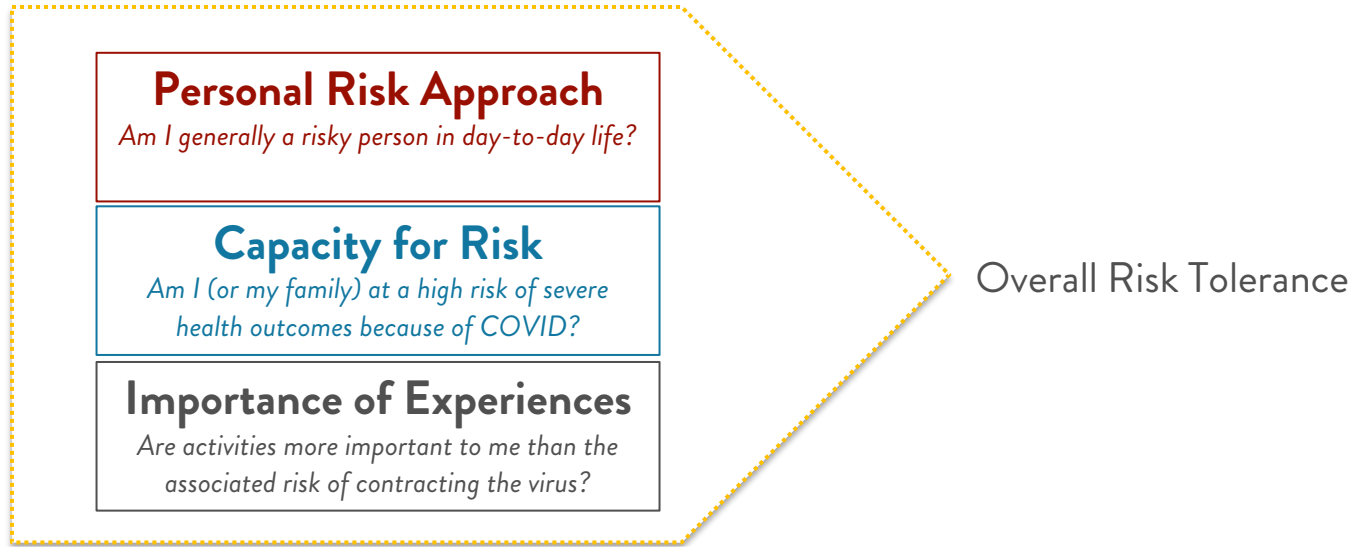
**How to consider risk?**



# Why is understanding risk important?

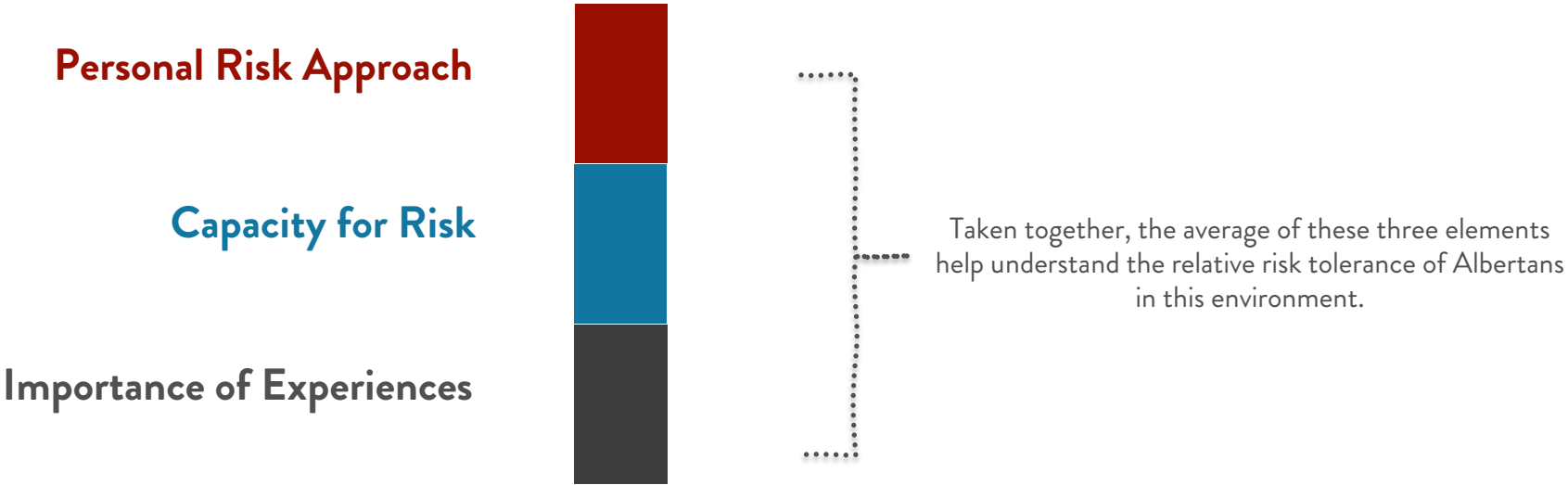
The complexity surrounding COVID-19 (with patchwork of policies, availability of activities, and public health guidelines) has demonstrated that comfort and desire cannot be used in isolation to understand intentions to participate in activities. Assessing risk tolerance becomes important, especially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

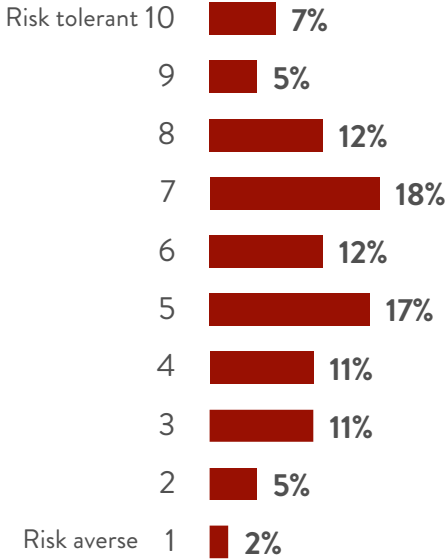
Because risk is multi-dimensional, understanding risk tolerance in the current environment needs to take into account each individual's day-to-day risk tolerance, their capacity for risk in this pandemic and the importance of experiences they pursue. This risk index models those three elements for each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



# How do Calgarians consider risk across three categories?

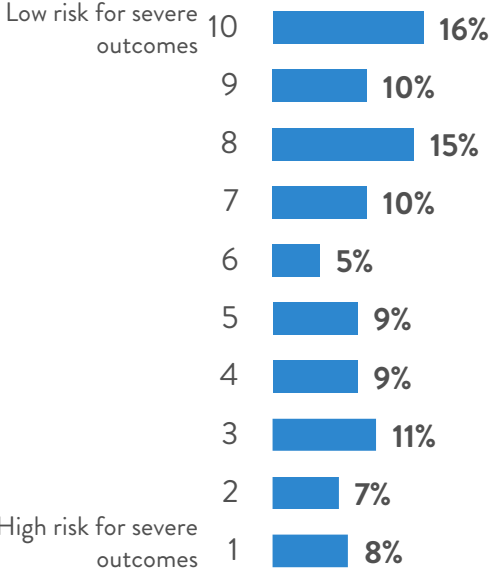
## Personal Risk Approach

An overall look into day-to-day life



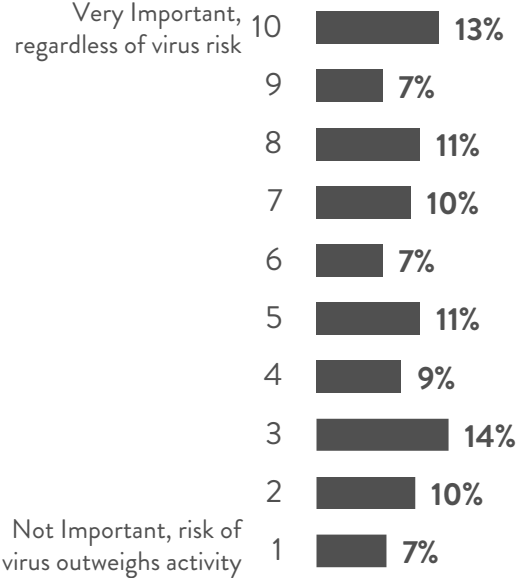
## Capacity for Risk

The risk of severe health outcomes



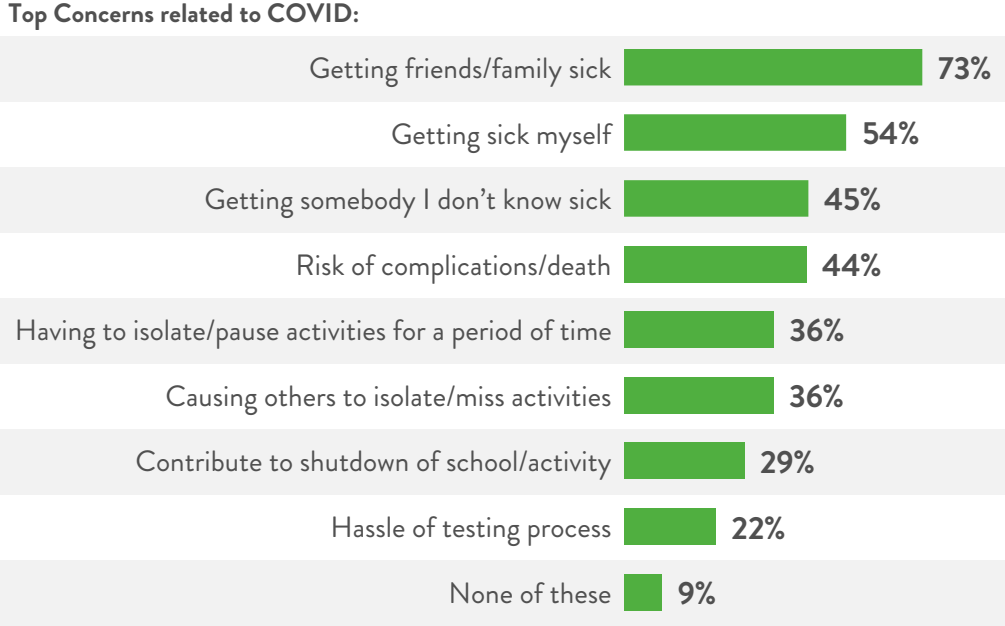
## Importance of Experiences

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: Calgary sample (n=494)

At a macro level, the majority of Calgarians are in the medium-risk category.  
But risk during a pandemic is more about others than the individual.



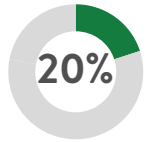
**C4/C5/C6 AVERAGE RISK TOLERANCE**

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: Calgary sample (n=494)

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

21% Albertans

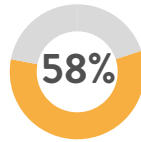


Risk Takers

**8.9** 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.

54% Albertans

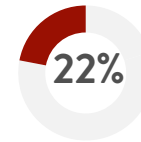


Risk Reducers

**5.9** AVERAGE RISK SCORE

Represents the majority of Calgarians (and Albertans on a province level). 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.

24% Albertans



Risk Avoider

**2.9** AVERAGE RISK SCORE

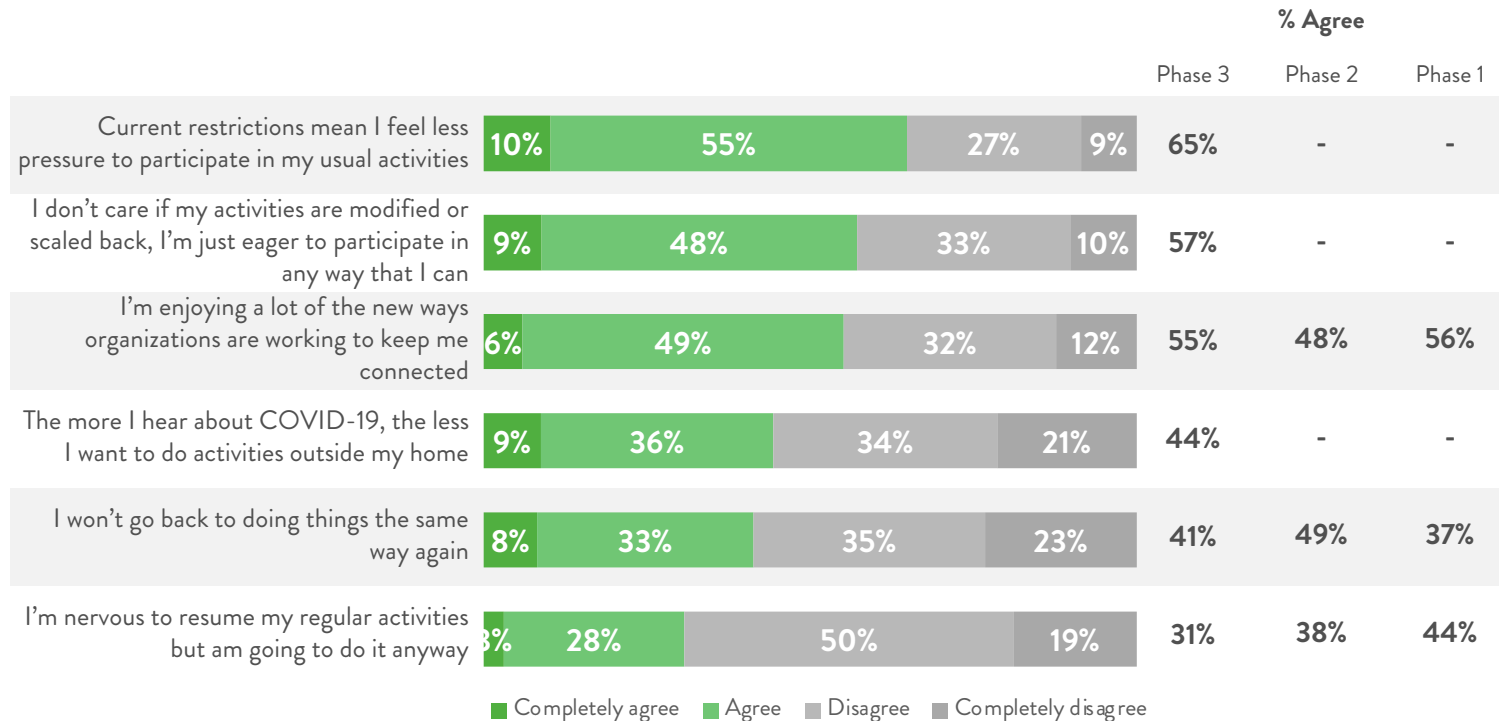
Risk Avoiders are most likely to be interacting with immediate family only, have a high level of wariness, and are most likely to anticipate future lockdowns. They tend to be slightly higher risk of severe outcomes (related to COVID) and have a high concern about getting others sick.

Detailed profiles for each risk group is included in the Alberta report

A dimly lit theater with rows of red seats. A person is sitting in the middle of the seats, looking towards the camera. The text "What are attitudes towards engagement?" is overlaid in white on the left side of the image.

**What are attitudes towards  
engagement?**

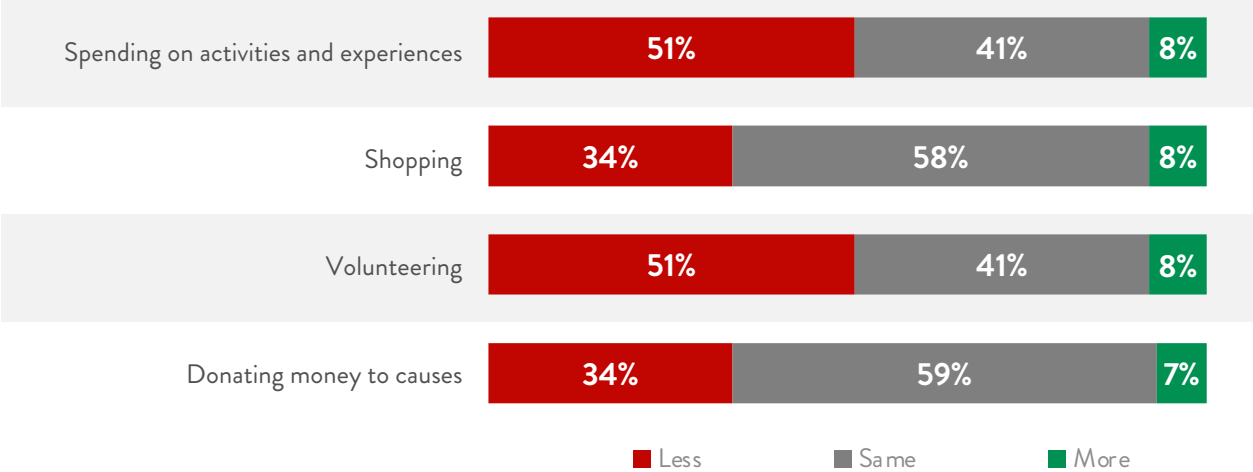
# There is a desire to engage, but Calgarians are also feeling less pressure to do so – leaving them in a position be selective in the activities they want to do





# Calgary organizations will need to adjust their expectations as there is smaller appetite for volunteering and softer willingness to donate

Next 3-6 months...

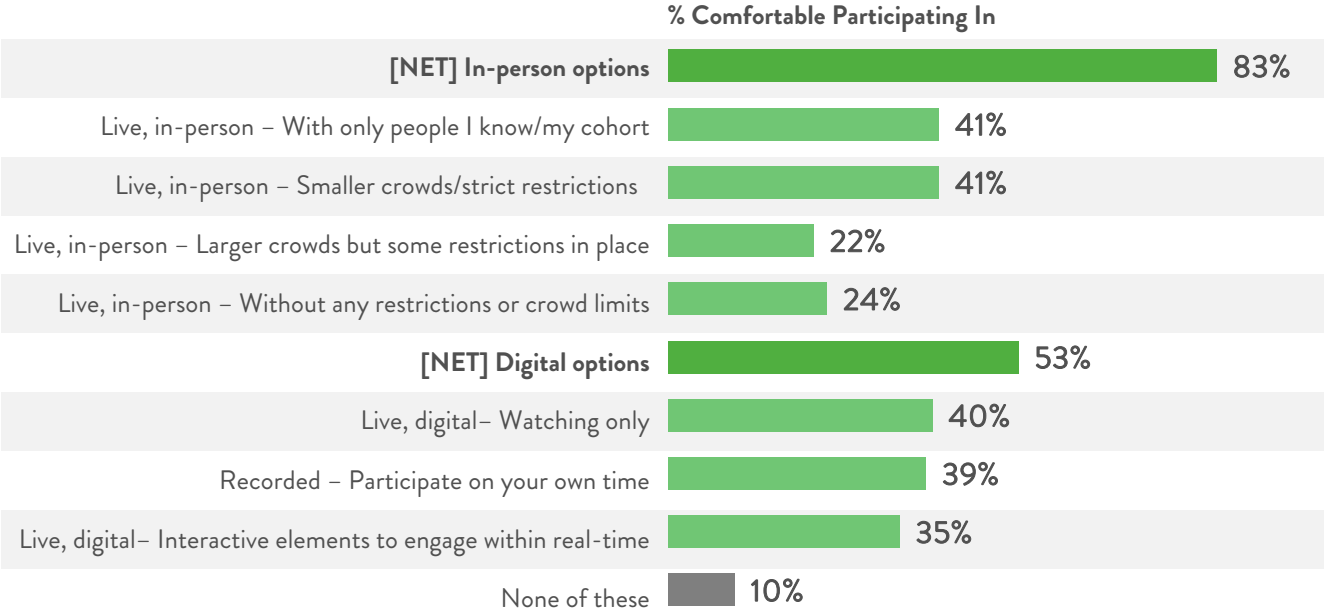


Looking ahead to next 3-6 months, do you expect you will do more or less of the following?  
 Base: Calgary sample – Rebased – Among those who do the activity (n=varies)

# Assessing Activity and Programming Options

A winter landscape featuring snow-covered mountains in the background, a dense forest of evergreen trees in the middle ground, and a frozen lake in the foreground. Several people are walking on the ice, and orange cones are visible, suggesting a recreational or safety activity. The scene is overlaid with a semi-transparent dark grey filter.

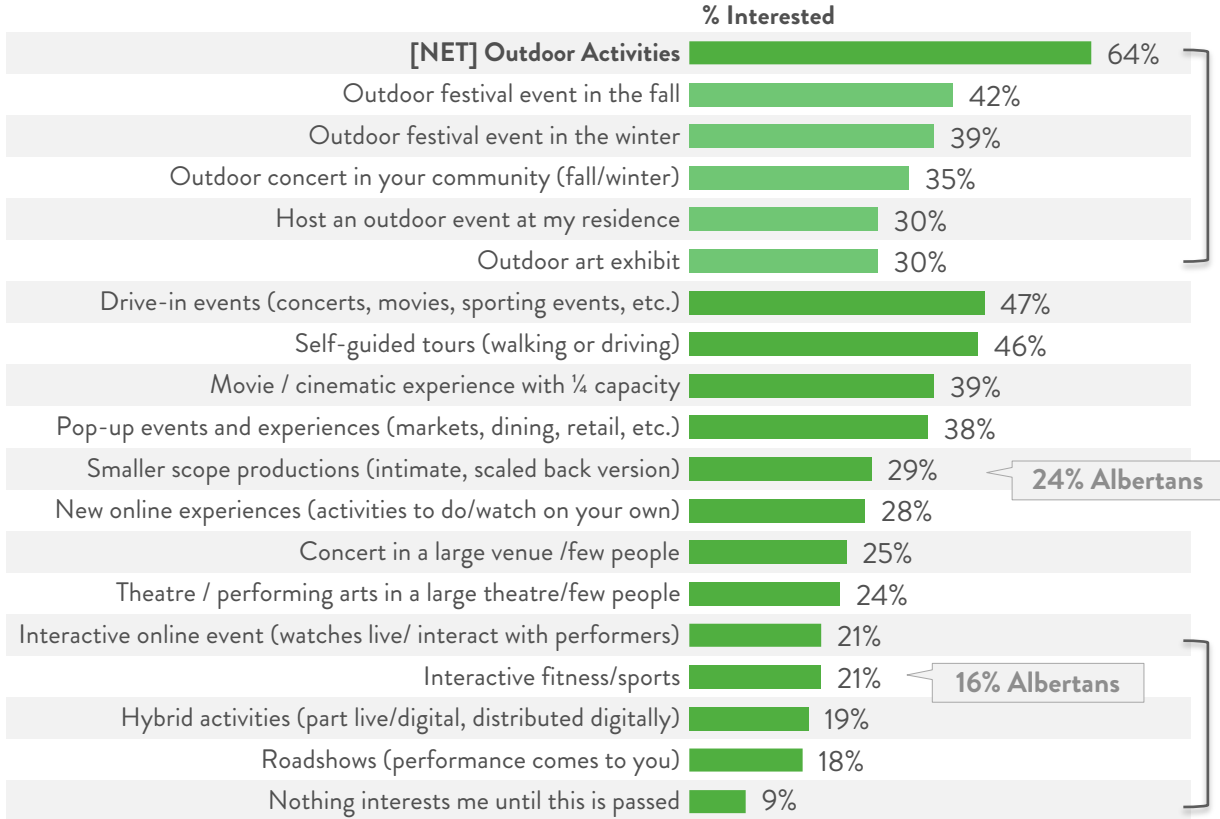
# Calgarians find in-person events more appealing to fulfill the desire for social interactions, but there is appetite for digital options



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: Calgary sample (n=494)

# Calgarians have a strong interest in outdoor events – these can provide a sense of safety but can also be enjoyed with social groups



How cold is too cold for Calgarians?

-9.5° C

24% Albertans

16% Albertans

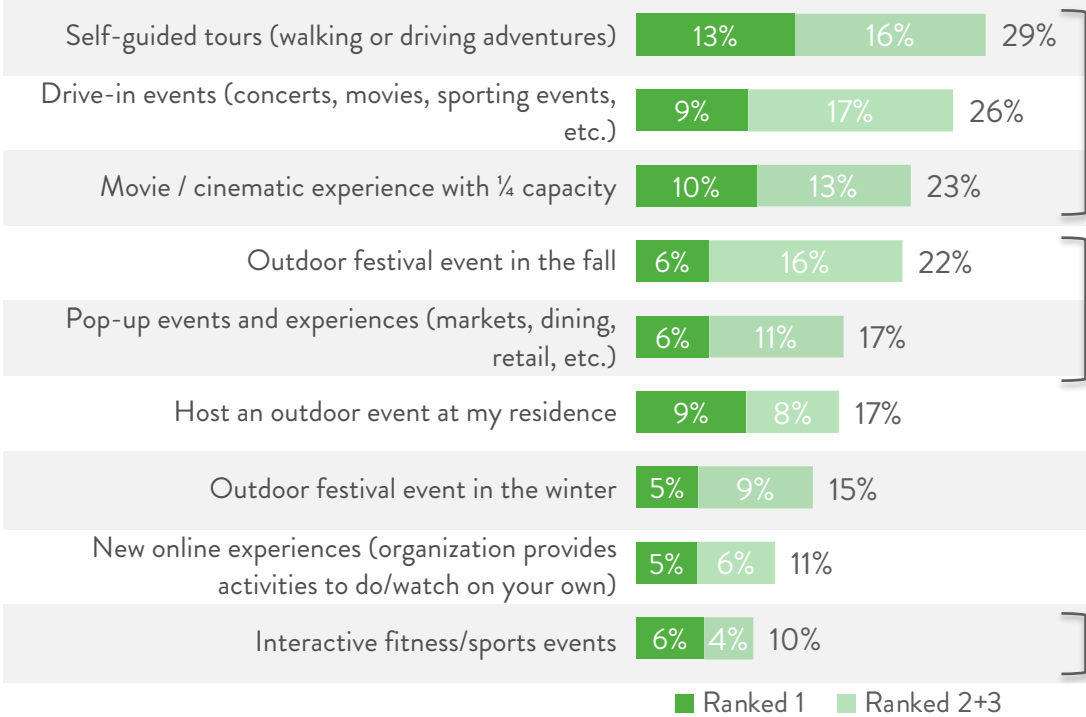
Weaker opportunities for social connections

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: Calgary sample (n=494)

# Most considered activities share common characteristics such as ease, flexibility and safety

Consideration – Ranked Top 3



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

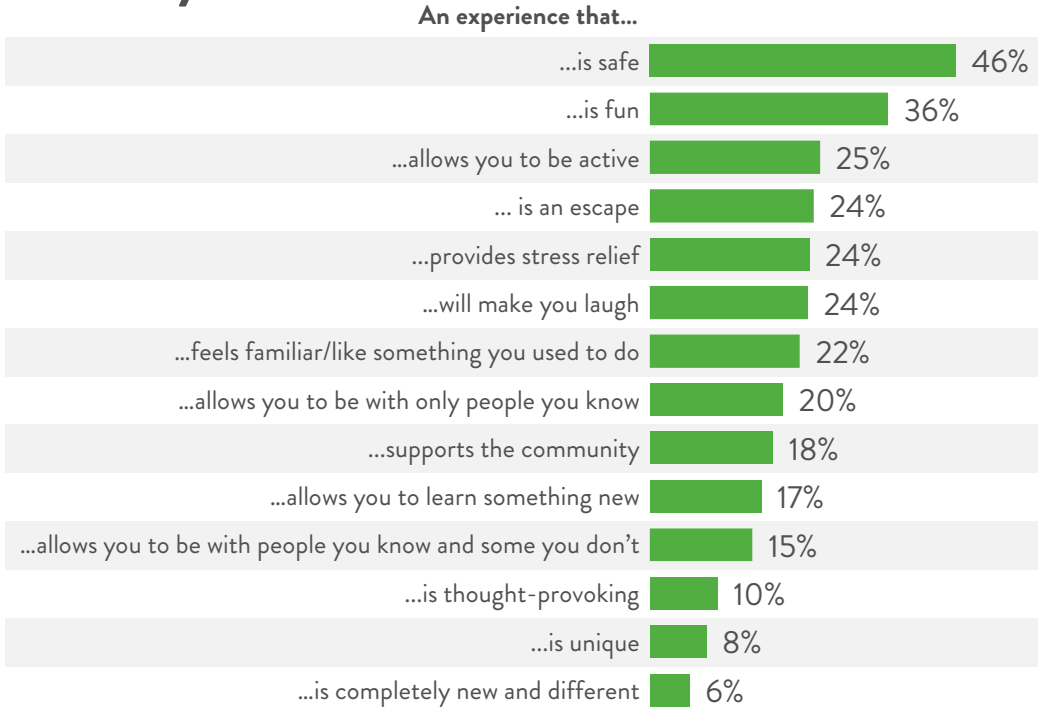
- Ease – Simplicity to know about and do
- Timing – Allows it to be done on own time at own pace
- Safe – Follows safety measures, including social distancing
- Social – Includes a social element, but staying within groups
- Shared – Includes a shared experience to talk about and enjoy

**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: Calgary sample (n=494)

# Messages need to include promises of safety for themselves and their cohorts, enjoyment that is worth the risk, and escapism to feel a sense of normalcy



Those with **lower risk** tolerance need to hear promises about being around **people they know and safety**.

Those with a **higher risk** tolerance are more focused on **fun, ability to be active and social mingling**.

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?

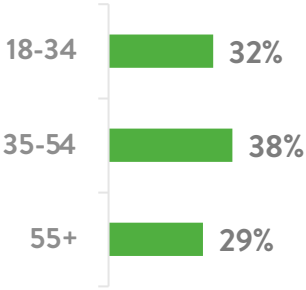
Base: Calgary sample and consider at least one activity (n=447)



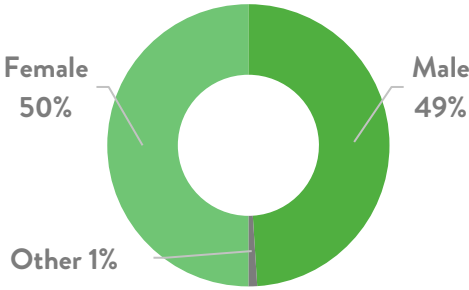
# Respondent Profile

# Who We Heard From (Calgary)

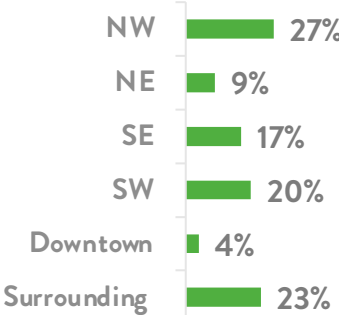
## Age



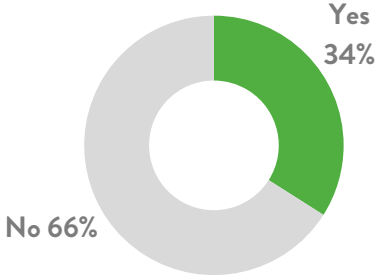
## Gender



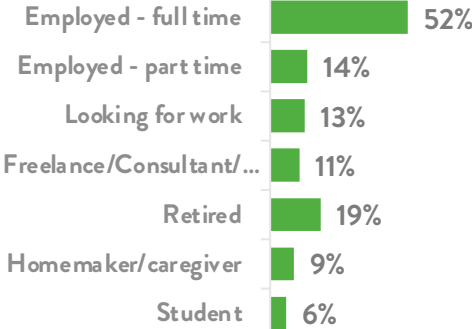
## Location



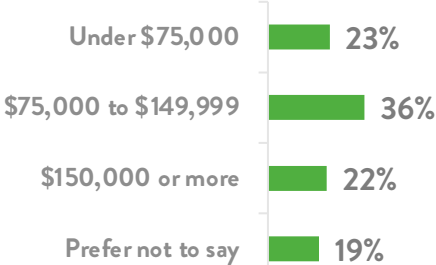
## Children in the Household



## Employment



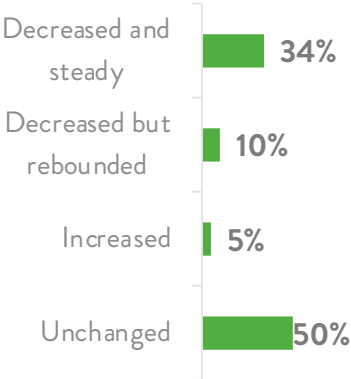
## Household Income





# Who We Heard From (Calgary)

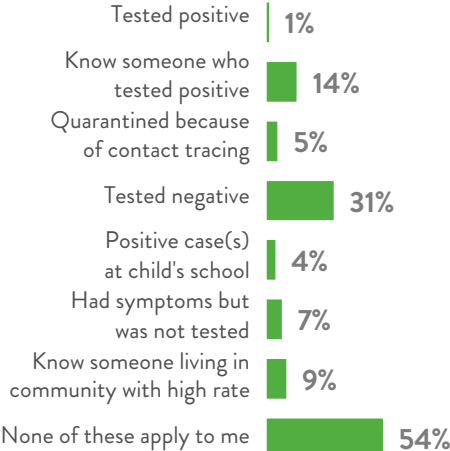
## Income Changes (COVID)



## Volunteer Profile



## Connection to COVID



**Stone —  
Olafson**

**Understanding people. It's what we do.**