

The background of the slide is a landscape photograph. It shows a wide, open field with dry, yellowish-brown grass in the foreground. In the distance, there is a line of trees and a clear blue sky. A bright sun is positioned in the upper center of the sky, creating a starburst effect. The overall scene is bright and clear.

The NEW Experience Economy:

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

Phase 3 Results: Edmonton
November 2020

Table of contents

- 3 Overview of research
- 5 How to use this report?
- 6 How is Calgary different?
- 8 Comfort levels and consumer mindset
- 11 How to consider risk?
- 17 What are attitudes towards engagement?
- 20 Assessing activity and programming options
- 25 Respondent profile

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

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.

Objectives:

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.

Methodology:

- Online survey, Albertans 18+
- Respondents were recruited through Angus Reid Forum.
- Field dates: October 5 to October 16, 2020
- Quotas set regionally, final data was weighted within Edmonton by age and gender.
- A total of 1,342 surveys collected with Albertans. Within that sample, 496 Edmonton-only surveys were collected:
 - 329 base surveys (within main sample)
 - 167 booster surveys

How to use this report:

This report will focus on outcomes from Edmonton respondents only. The purpose of this report is to provide a supplementary perspective of the Edmonton market specifically, for organizations who operate in the region. A total of 496 Edmonton-specific surveys were collected (329 base, 167 boost) from October 5th – 16th.

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

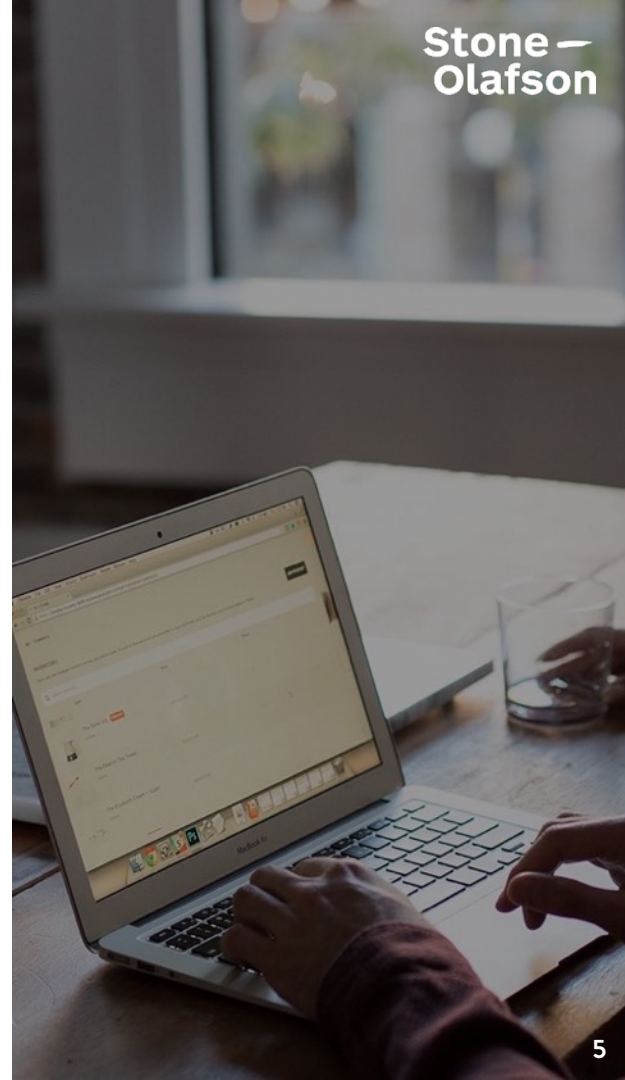
www.stone-olafson.com/insights

Please note:

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 Edmonton?

1.

Comfort and risk continue to be lowest

Although comfort has stayed steady since the last phase of research, Edmontonians continue to have the lowest comfort levels within the province. Further, they also tend to be less risk tolerant.

This is closely correlated to the high volume of cases in this city and is something to watch as cases continue to rise over the province.

2.

Slightly greater interest in digital activities

In-person activities are desired to the same degree as Albertans, but Edmontonians are showing less digital fatigue and more hesitancy to leave the house compared to Albertans. They are also likely keeping smaller cohorts. This reflects their comfort and risk levels and is represented in the types of activities that they are most interested in.

3.

Talk about safety more than anything

Edmontonians need to be promised messages of safety before they consider engaging in any activity. This is a key message for all Albertans but has added weight in a region with higher wariness and lower comfort levels.

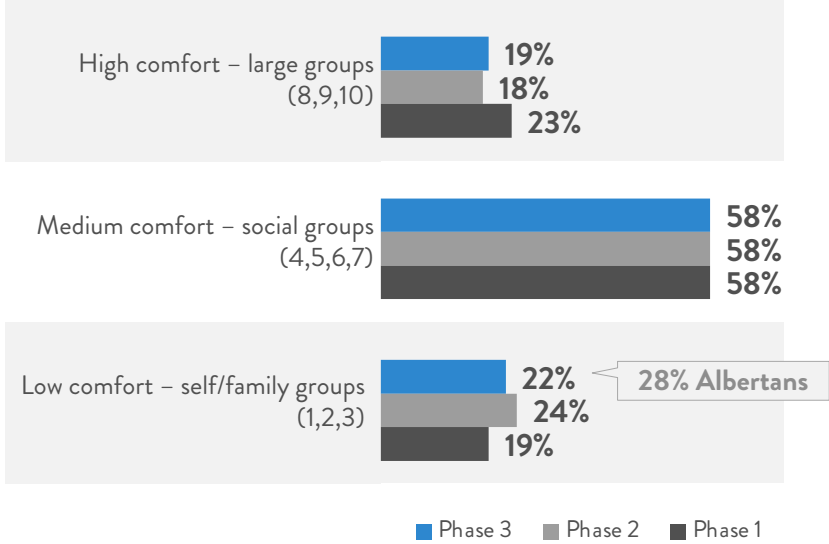
This message can compliment promises of fun and stress relief, to build on other key motivations Edmontonians will have to engage.

Comfort levels and consumer mindset

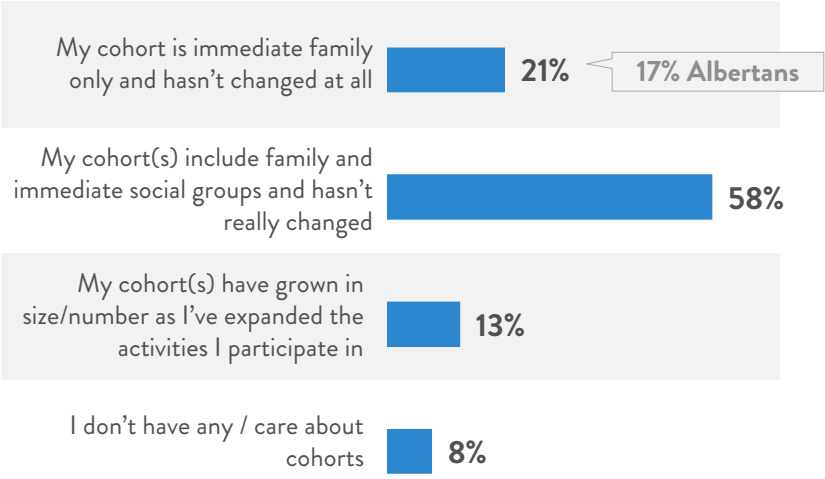


With the rise of cases in Edmonton, comfort levels remain lower than the province; Edmontonians tend to stick closer to family /small social groups

Comfort Level



Cohort Consideration

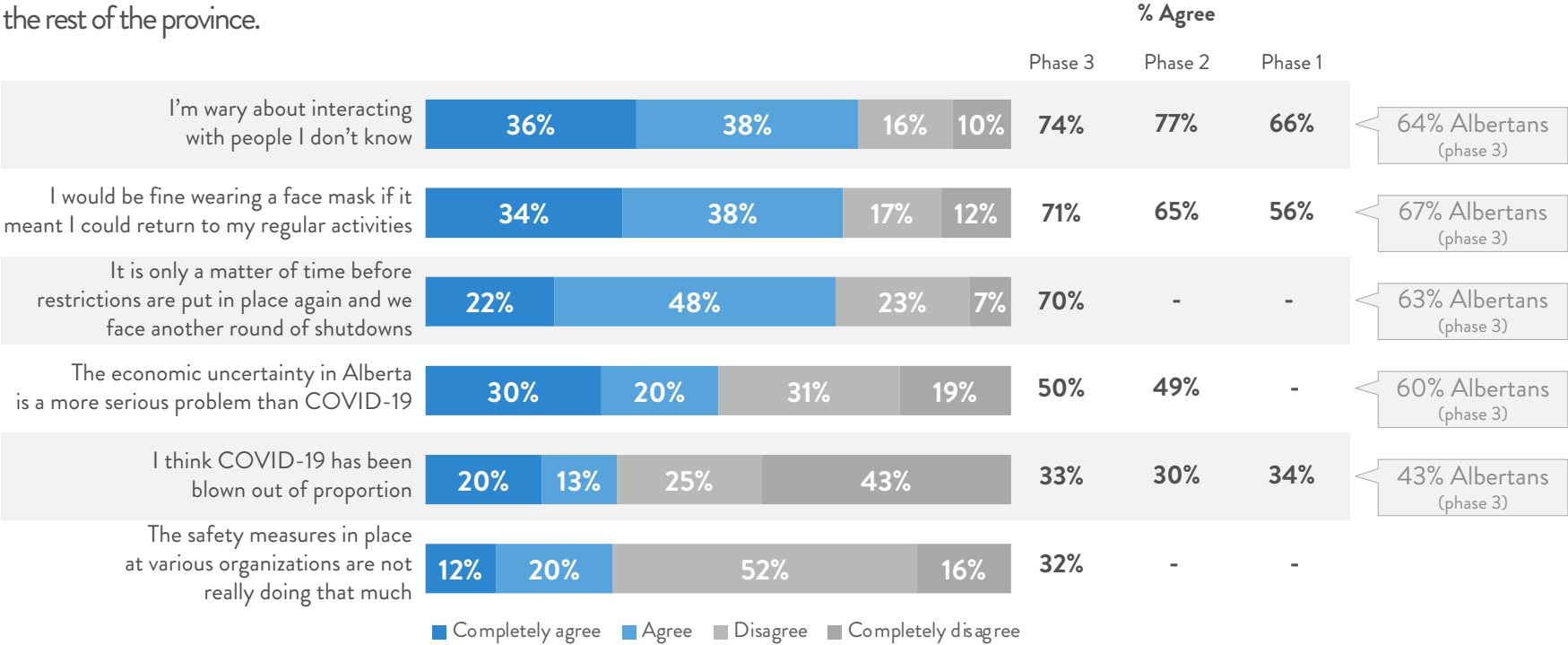


As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community? Albertans have been encouraged to consider “cohorts”, or limited groups of people you associate with you to reduce exposure to COVID-19. Which statement best describes how you approach cohorts?

Base: Edmonton sample (n=496)

Attitudes towards the pandemic continue to demonstrate lower comfort and wariness in the Capital city

The proportion of those who feel economic uncertainty is a bigger problem is also much softer than the rest of the province.



Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.
Base: Edmonton sample (n=496)

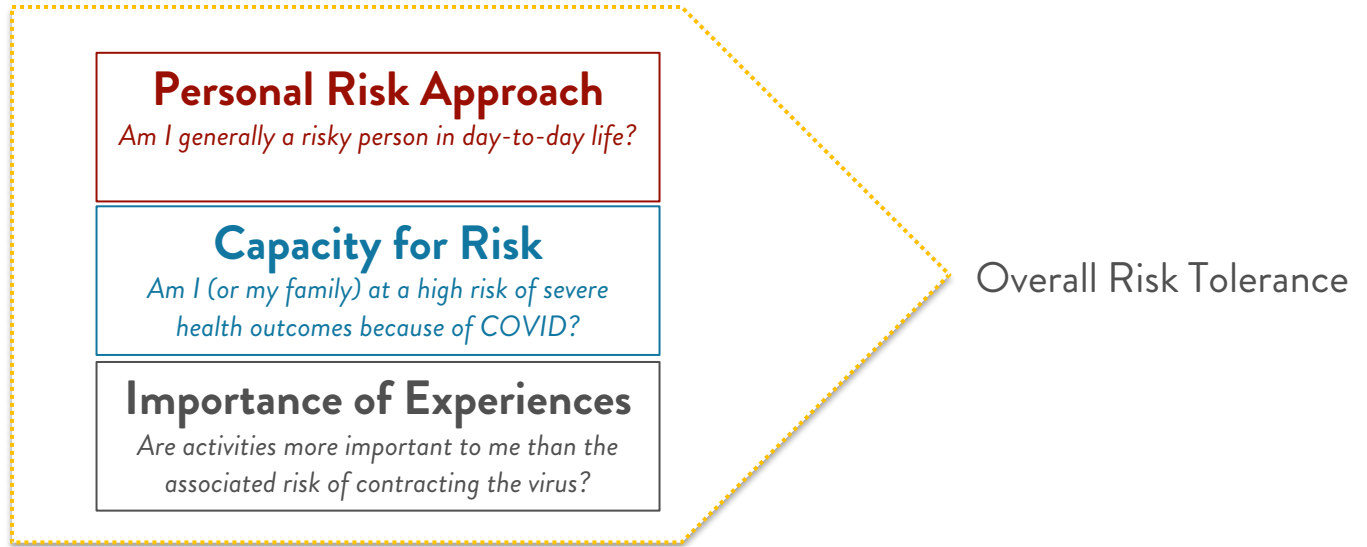
How to consider risk?



Why is understanding risk important?

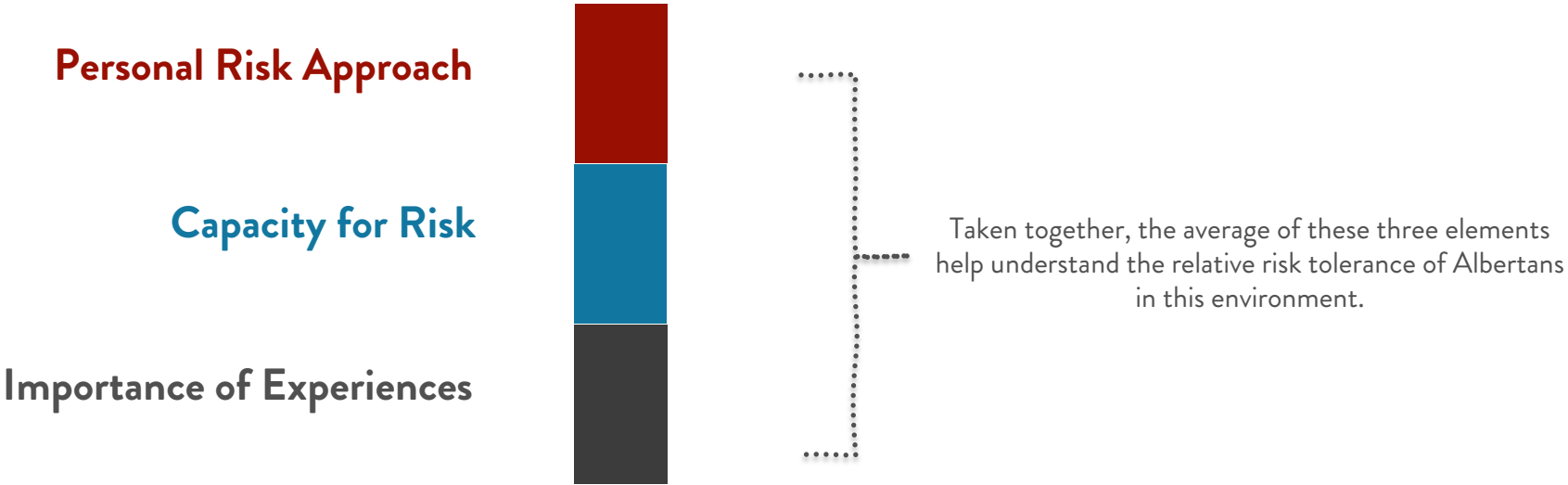
The complexity surrounding COVID-19 (with patchwork of policies, availability of activities, and public health guidelines) has demonstrated that comfort and desire cannot be used in isolation to understand intentions to participate in activities. Assessing risk tolerance becomes important, especially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

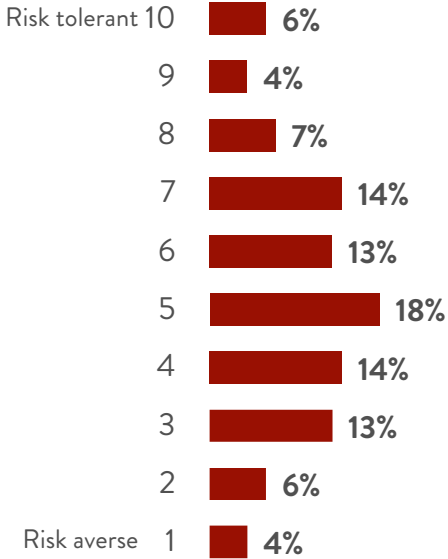
Because risk is multi-dimensional, understanding risk tolerance in the current environment needs to take into account each individual's day-to-day risk tolerance, their capacity for risk in this pandemic and the importance of experiences they pursue. This risk index models those three elements for each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



How do Edmontonians consider risk across three categories?

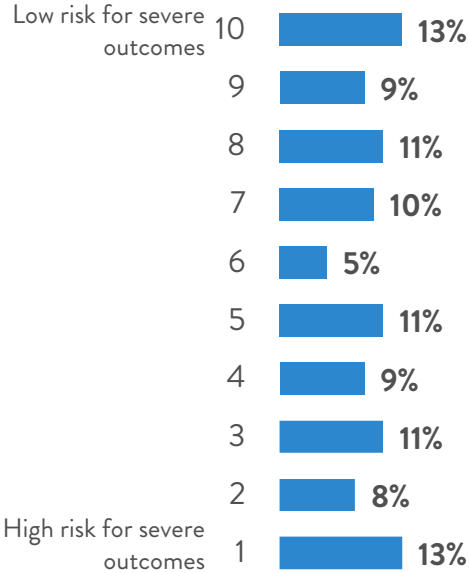
Personal Risk Approach

An overall look into day-to-day life



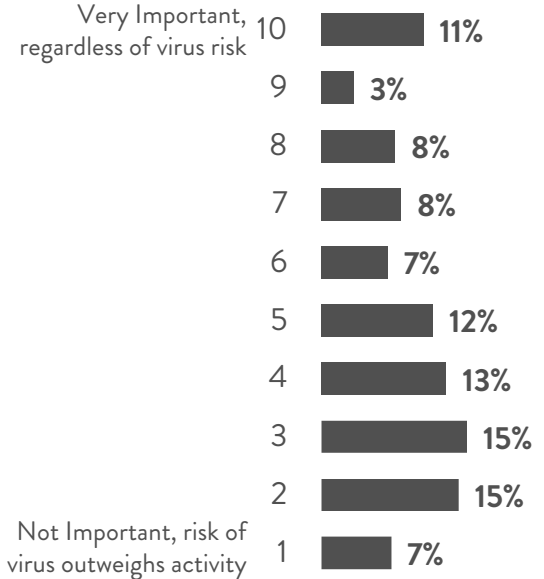
Capacity for Risk

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?

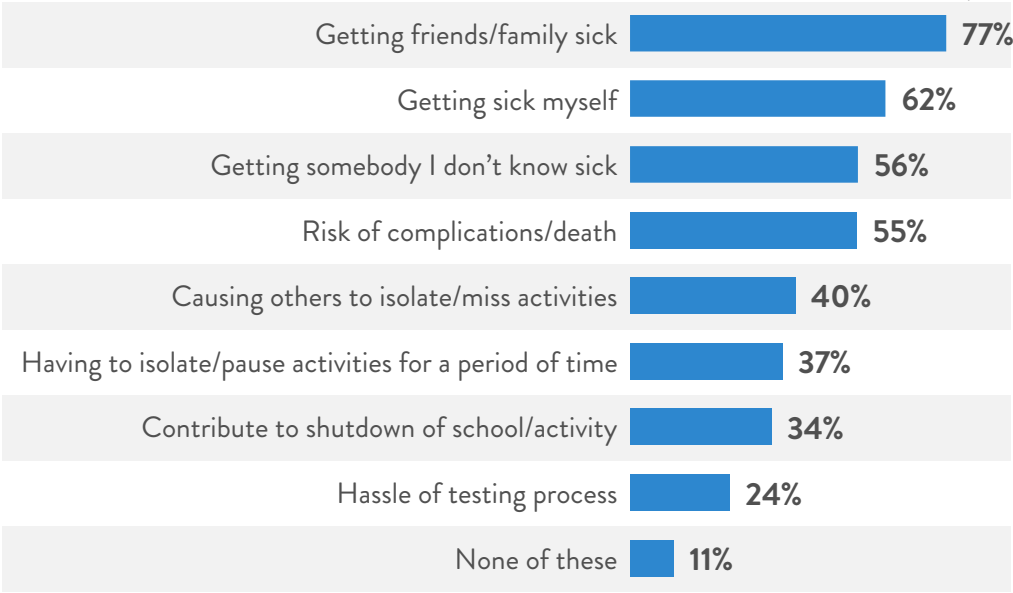
Base: Edmonton sample (n=496)

Edmontonian have a lower risk tolerance compared Albertans – their concerns are also heightened



All ratings are higher when compared to Albertans

Top Concerns related to COVID:

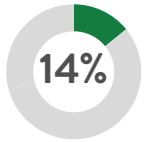


C4/C5/C6 AVERAGE RISK TOLERANCE

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.

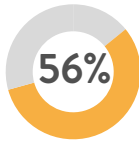
Base: Edmonton sample (n=496)

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



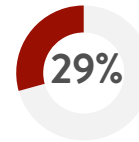
Risk Takers
9.0 AVERAGE RISK SCORE

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
5.7 AVERAGE RISK SCORE

Represents the majority of Edmontonians (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.



Risk Avoider
2.7 AVERAGE RISK SCORE

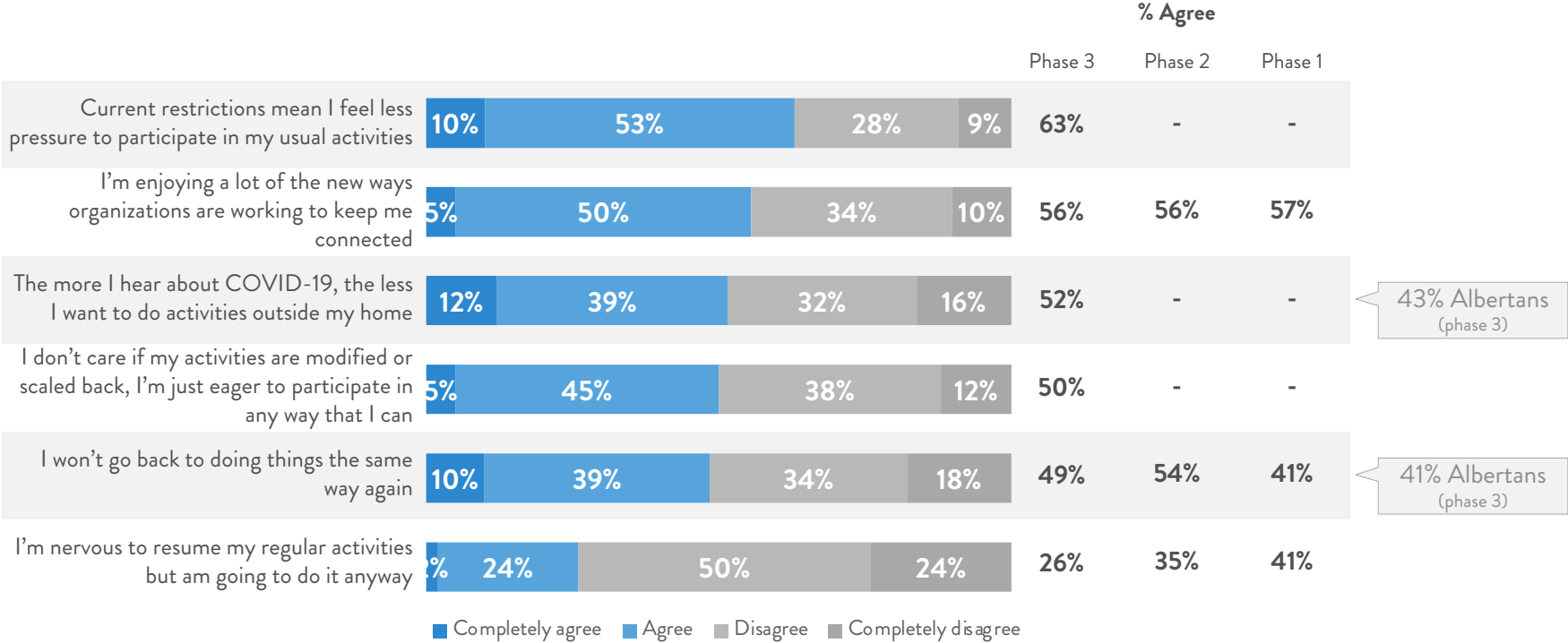
Risk Avoiders are most likely to be interacting with immediate family only, have a high level of wariness, and are most likely to anticipate future lockdowns. They tend to be slightly higher risk of severe outcomes (related to COVID) and have a high concern about getting others sick.

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

A photograph of a theater interior 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?**

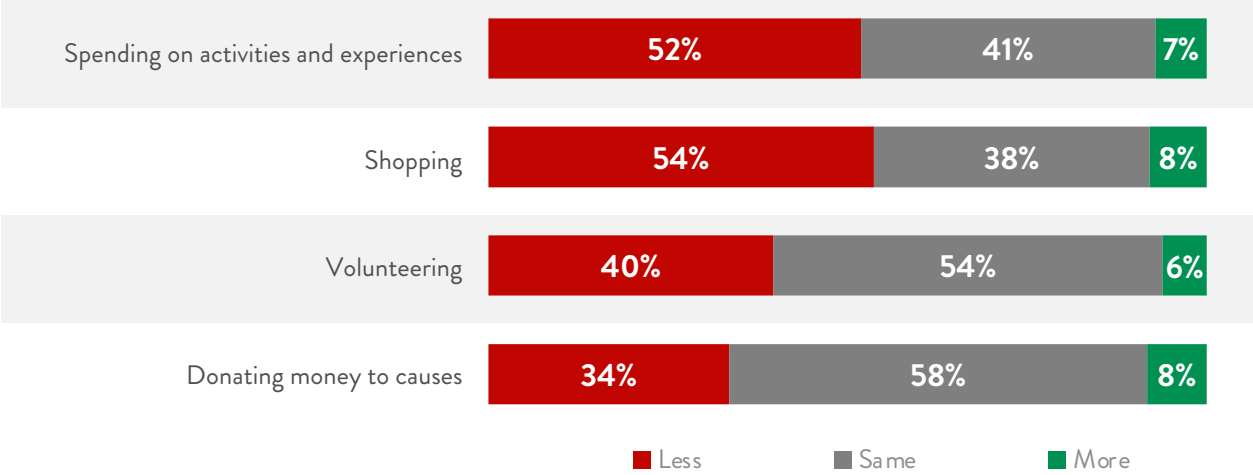
COVID in the media is having greater impact on Edmontonians and they are less likely to see their lives going back to the way they were



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.
 Base: Edmonton sample (n=496)

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

Next 3-6 months...

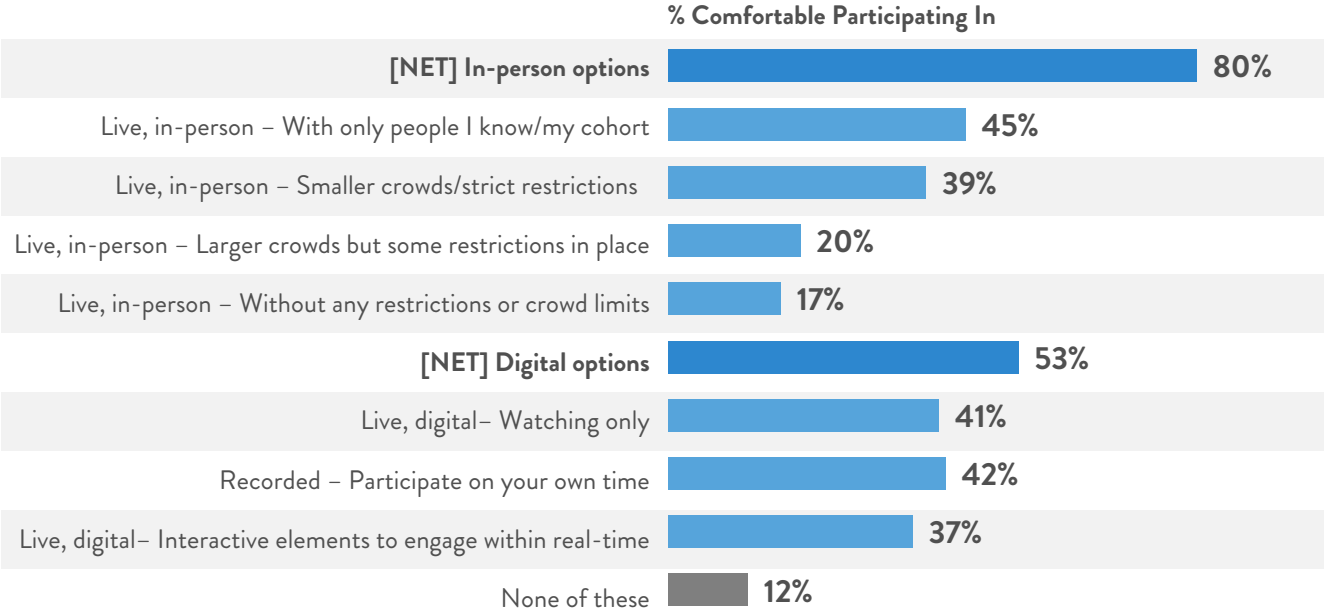


Looking ahead to next 3-6 months, do you expect you will do more or less of the following?
 Base: Edmonton sample – Rebased – Among those who do the activity (n=varies)

A photograph of three people jumping joyfully in a snowy outdoor setting. The person on the left is a woman with glasses and a brown jacket, the person in the middle is a man with glasses and a blue jacket, and the person on the right is a man with glasses and a black t-shirt. They are all smiling and have their arms raised. The background shows a snowy landscape with trees and a building. A sign in the background reads "Caution! Cross Traffic Does NOT Stop for Pedestrians".

Assessing Activity and Programming Options

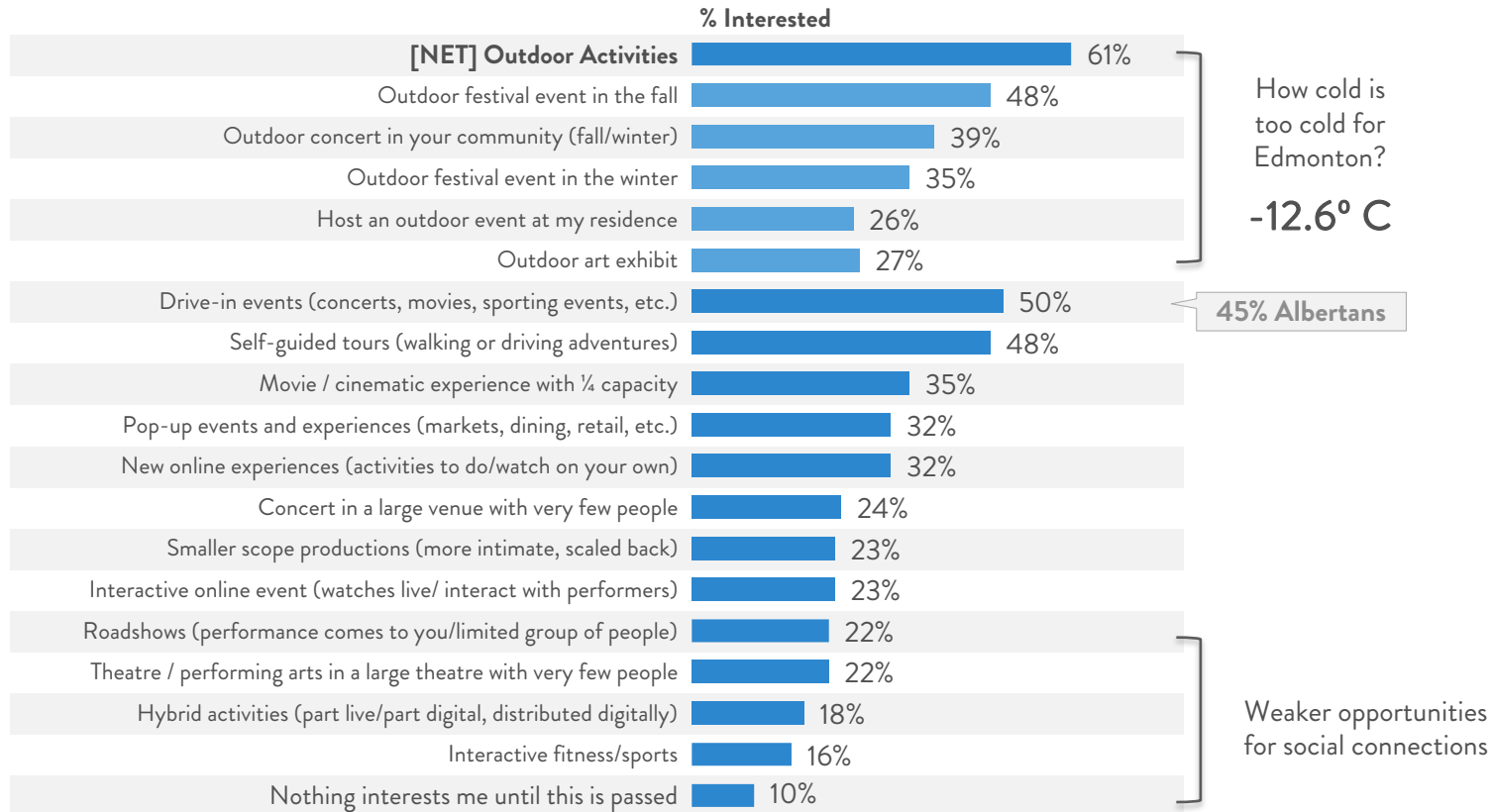
Edmontonians share similar interests for in-person and digital events as Albertans – they desire the social connection but also to keep to close social groups for comfort



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: Edmontonian sample (n=496)

Like Albertans, Edmontonians are most interested in outdoor events – these can provide a sense of safety but can also be enjoyed with social groups

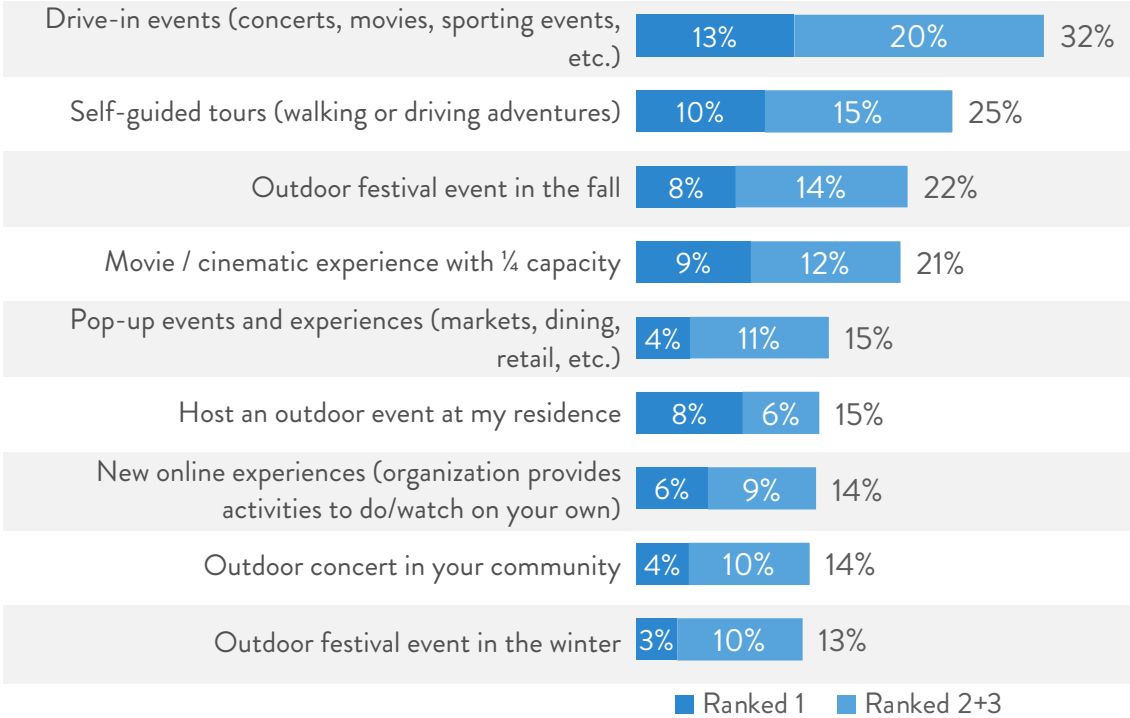


Below are a number of different types of activities. Assuming these were offered by an organization that you knew and engaged with regularly, which ones are you interested in?

Base: Edmonton sample (n=496)

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

Consideration – Ranked Top 3

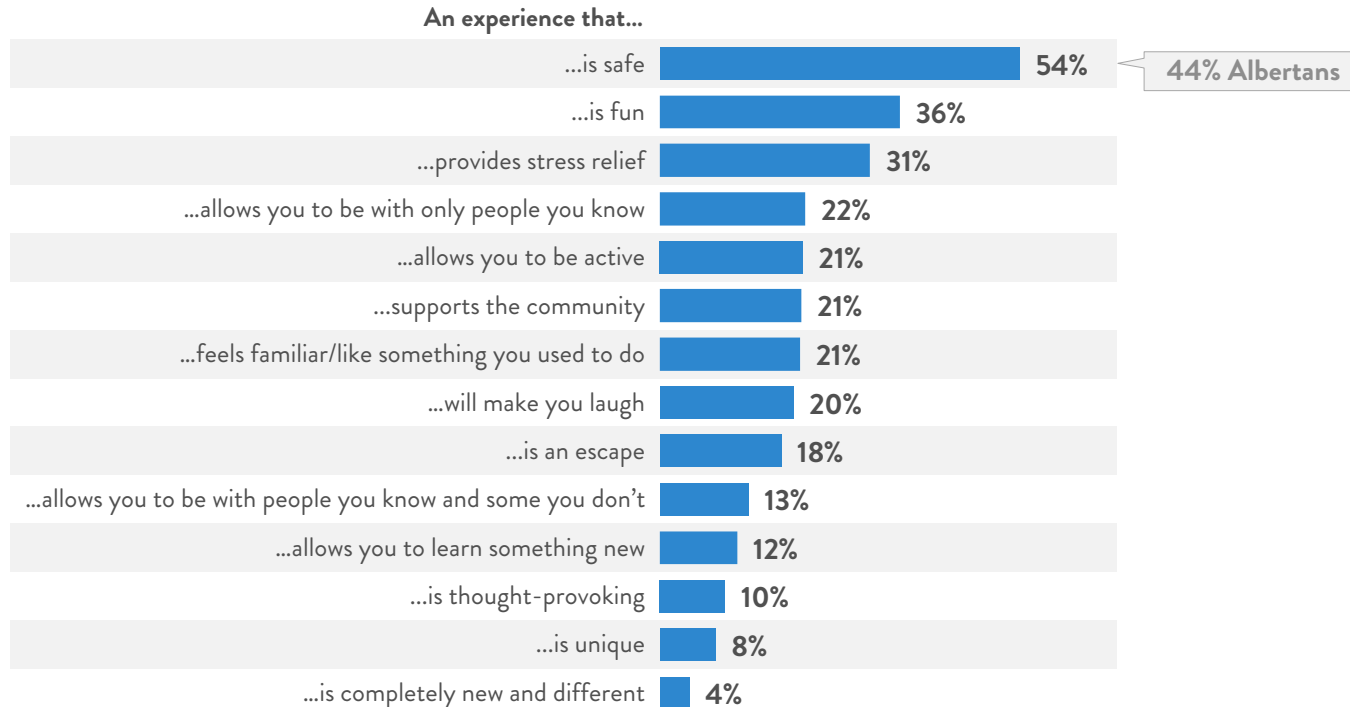


Top activities are broad-based and allow for flexibility in how events are designed. Shared characteristics include:

- 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

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: Edmonton sample (n=496)

Messages need to include promises of safety (even more so for Edmontonians), 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?

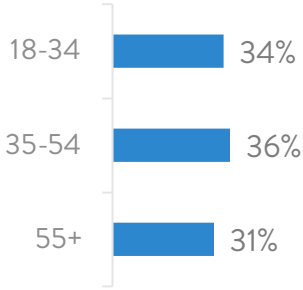
Base: Edmonton sample and consider at least one activity (n=454)



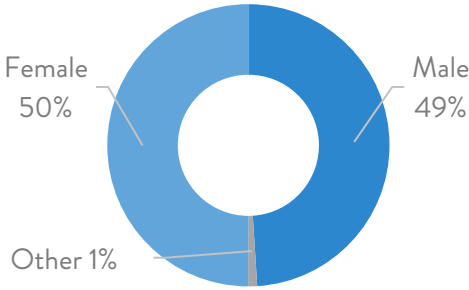
Respondent Profile

Who We Heard From (Edmonton)

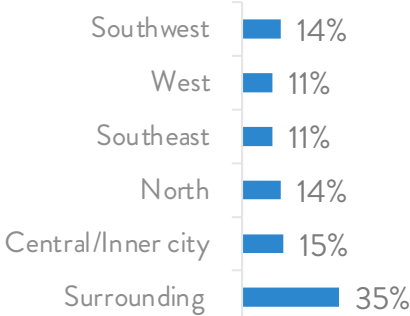
Age



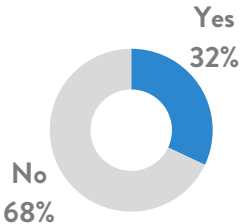
Gender



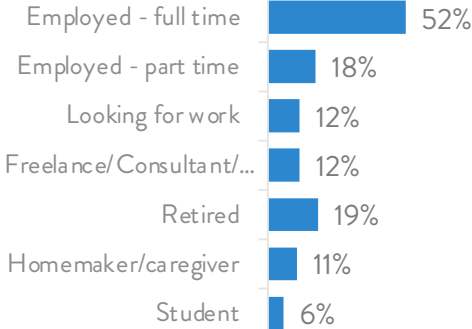
Location



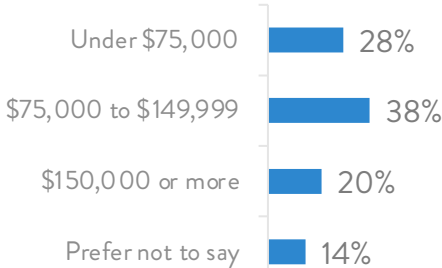
Children in the Household



Employment

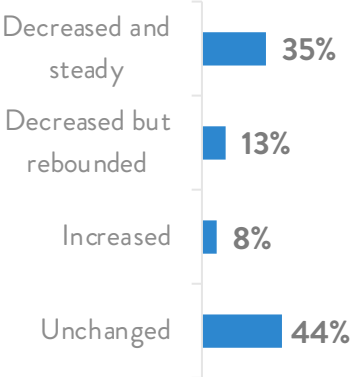


Household Income



Who We Heard From (Edmonton)

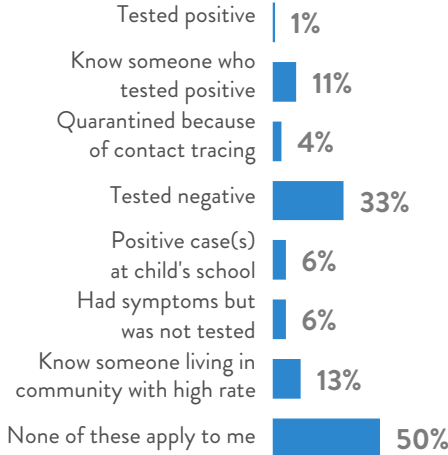
Income Changes (COVID)



Volunteer Profile



Connection to COVID



**Stone —
Olafson**

Understanding people. It's what we do.