

The NEW Experience Economy:

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

Phase 4 Results
January 2021

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 caseloads increasing across the province, additional protocols and restrictions were put in place. Attitudes and behaviours of Albertans have the potential to shift alongside these changes. The fourth round of research focuses on the following:



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



Capture impressions and impact of restrictions and protocols; and,



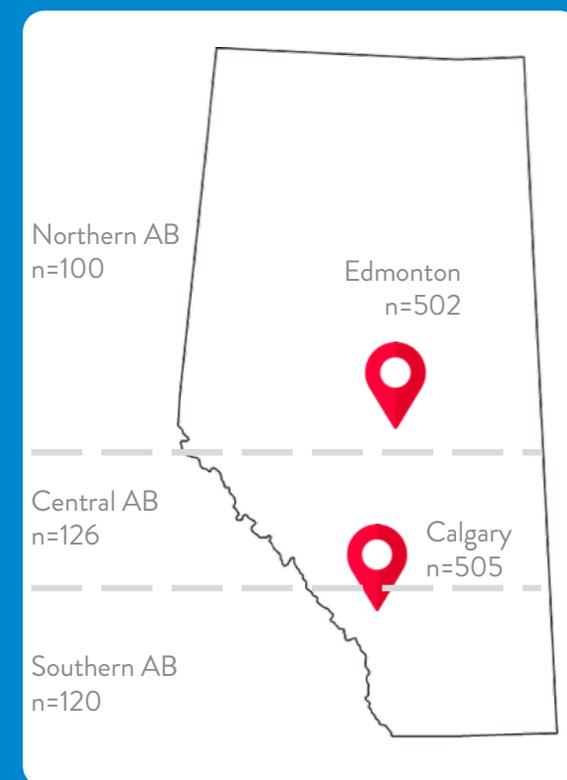
Build on understanding of how Albertans are spending their time and what they want to see from experience organizations.

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 4. 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 1,352 Albertans participated in this third phase of research. Responses include 1,015 regionally balanced core sample, plus supplemental (booster) responses for Calgary and Edmonton.
- The longitudinal survey includes 83% of respondents retained from phase 3 (17% of respondents new for phase 4).
- Data collection occurred between December 8 and December 20, 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.

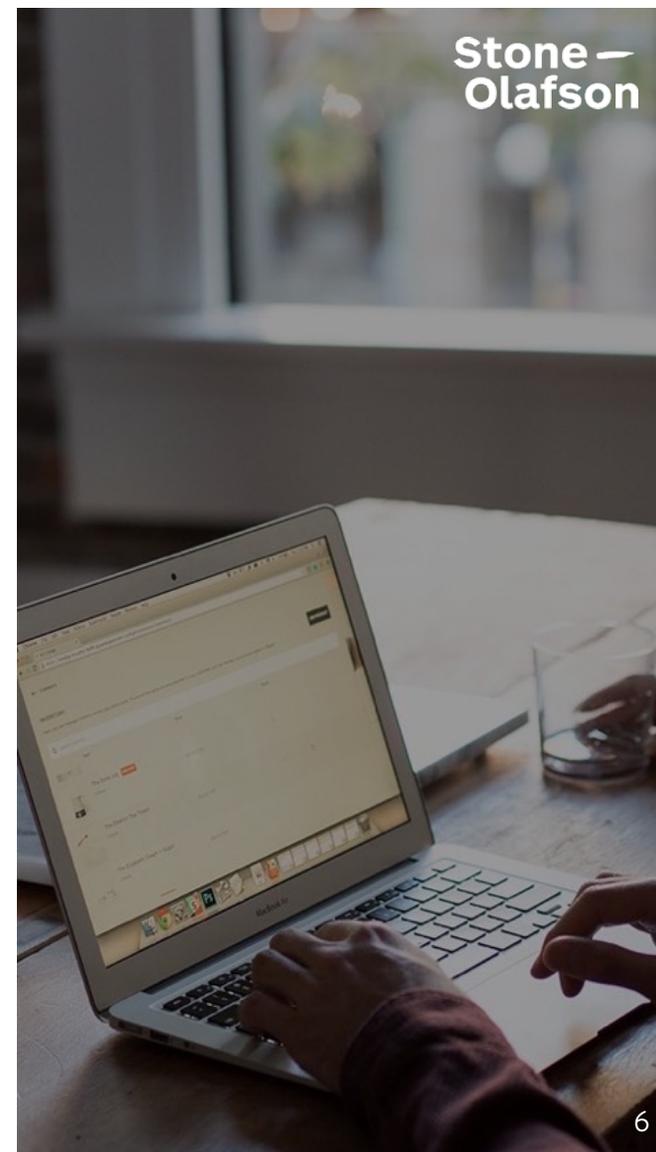


Additional Notes on Reading the Report

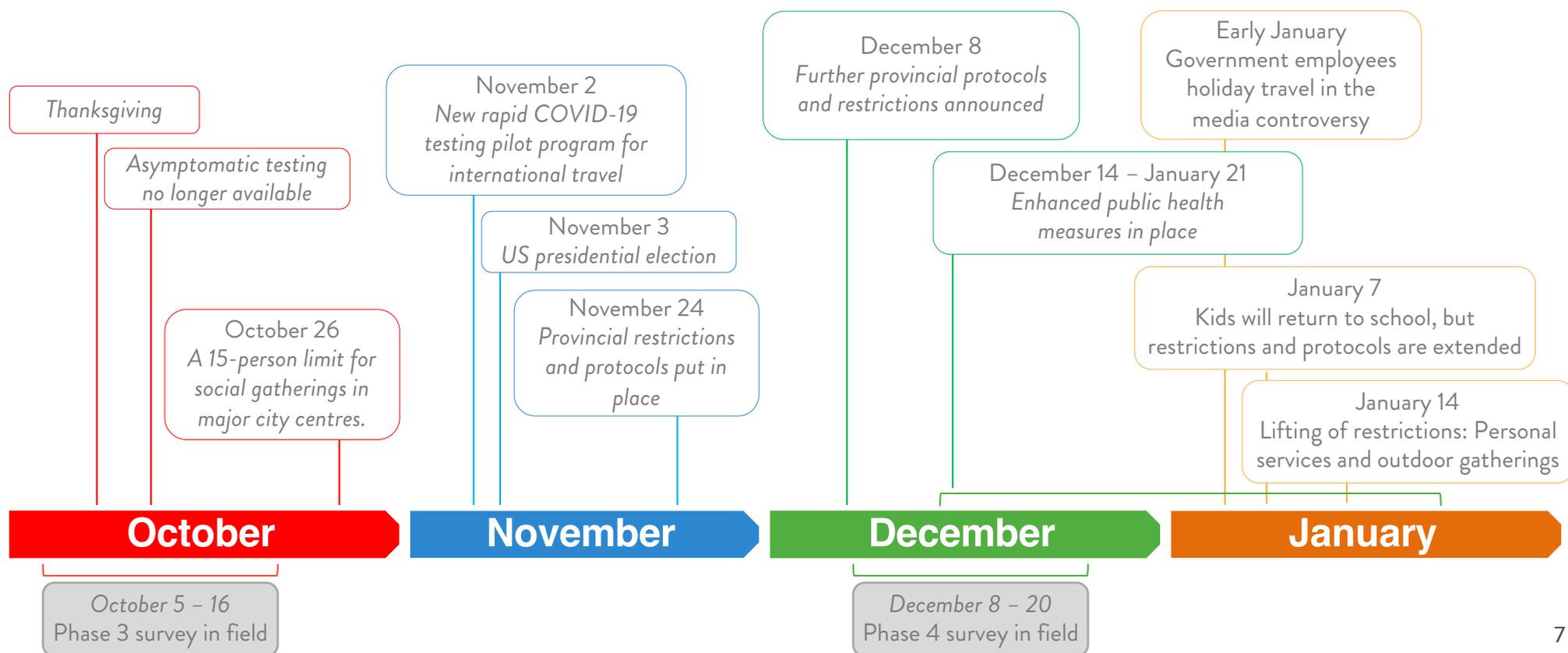
Numbers presented have been rounded and sums may not correspond exactly to numbers in the detailed data tables made available.

Throughout the report, arrows are used to indicate a statistically significant results (up or down).

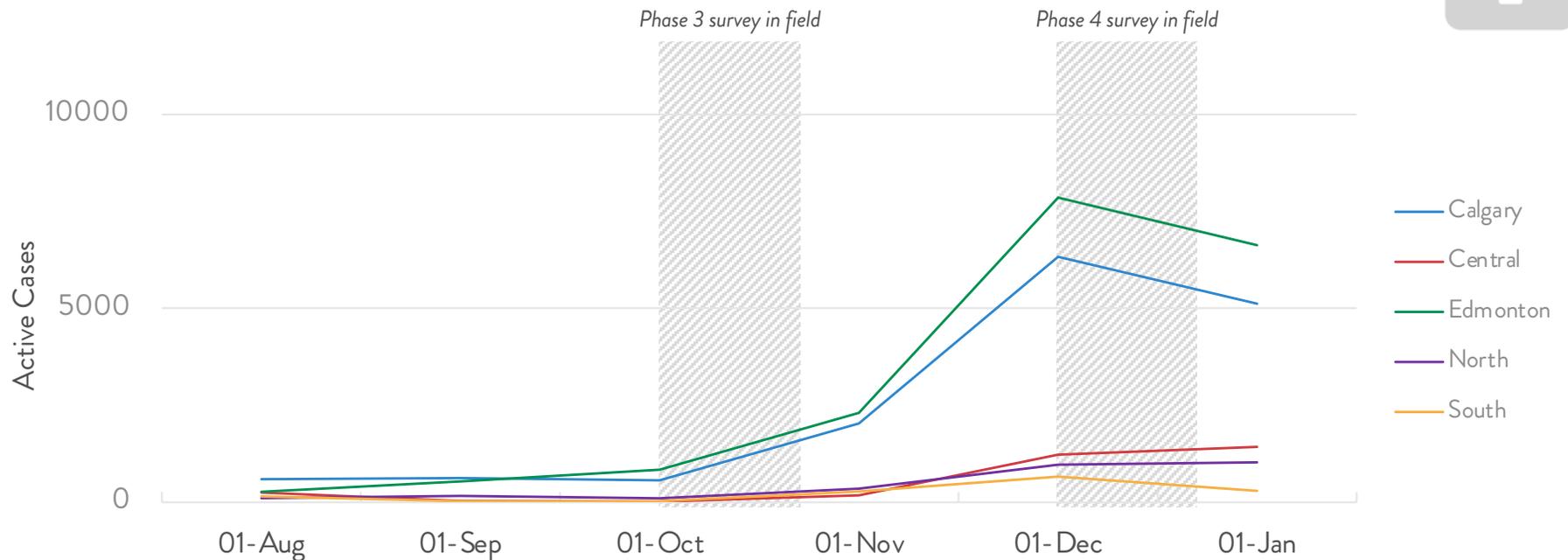
Due to the inclusion of online, non-random sampling, a standard margin of error is not calculated for the results. However, an *approximate* rate of reliability typically associated with an overall sample of this size would be +/- 2.7%, 19 times out of 20.



Mapping the progression of COVID-19 in Alberta

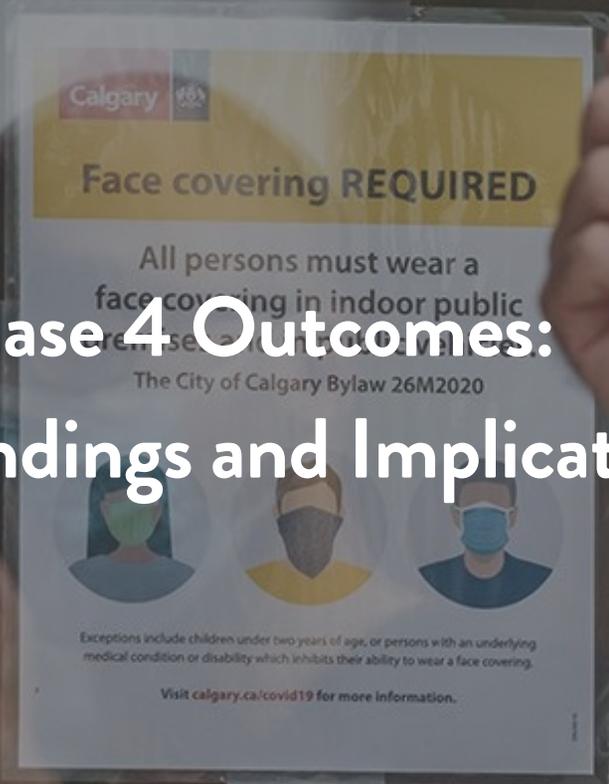


COVID Contexts: By the Numbers



	01-Aug	01-Sep	01-Oct	01-Nov	01-Dec	01-Jan
Total Active Cases Alberta	1,379	1,400	1,557	5,153	17,044	14,510
% Change (previous month)	+155%	+2%	+11%	+231%	+231%	-15%
Hospitalizations	86	50	64	140	504	921

Source: <https://www.chi-csm.ca/>



Phase 4 Outcomes:

Findings and Implications for Alberta Organizations

1.

Perceptions reflect the low tide of the pandemic to this point.

Since the very start of the pandemic public health officials have warned of different 'waves' to this crisis. Progress was made in reducing case loads last summer, but the situation has worsened drastically this fall/early winter; causing new restrictions to be put in place across the province. So it is not altogether surprising that the emotional state of the market is steadily more negative – higher proportions are frustrated (62%), annoyed (52%), stressed (43%), worried (41%) and exhausted (41%). These are more prevalent emotional reactions than previously recorded. At the same time audiences are now even less comfortable with large groups. More and more Albertans do not think the pandemic has been blown out of proportion.

While numbers have started to improve, it is unlikely that this will be the last 'wave' we will experience. Ultimately, outcomes provide a valuable snapshot of how audiences feel coming out of this challenging situation.

Why this matters: When conditions permit, recognize you will be reconnecting with a weary population who are more anxious than before. Messages and offers will need to further adjust.

2.

Adapting to and following the rules

Albertans are generally accepting of restrictions – as we established last wave, most see it as doing their part to protect each other. Despite increased frustrations, the vast majority of Albertans are fine with protocols and shifts in restrictions. In fact, two-in-three Albertans wished the current restrictions were put in place earlier so that we can get back to normal sooner. (This is by no means universal as the ‘Risk Taker’ segment is not aligned on these restrictions.) Confidence in the measures is certainly mixed as just less than half of Albertans are confident the enhanced restrictions put in place in December will have a positive impact. Ultimately, however, they seem to recognize the importance of them as this is much more confidence than what they had for the previous level of restrictions (22%).

As they accept and get used to the restrictions, they expect others to follow them too. Large proportions (69%) indicate others not following protocols will dissuade them from attending events/participating in activities. The same applies for not seeing sufficient safeguards in place.

Rule following doesn’t mean they don’t want to engage, we know they have the desire, but anything they consider must closely follow health and safety protocols. Basic acceptance of the restrictions and ongoing protocols, are likely working in concert with case numbers to influence comfort.

Why this matters: Albertans have high expectations for organizations to follow protocols and getting the audience to do the same is now table stakes. Looking ahead, this may be an indicator of the potential for addressing comfort in a post-pandemic environment.

3.

Change in habits during the pandemic appears to be additive, not alternative

Across the province the vast majority are eager to get back to their usual activities or rediscover past experiences once the pandemic is behind us. But, as seen in previous waves, many are adding new experiences to what they do – likely out of necessity. (Remember – it is unlikely their social and experiential motivations that drove previous engagement has disappeared – only 7% strongly agree their interests have changed). For example, the absence of directed experiences are being substituted by self-directed activities.

As restrictions start to lift, Albertans are likely to start figuring out how to balance a new set of activities they enjoy with their usual activities they want to get back to. And for organizations, that means breaking through a larger competitive set to capture the attention of their audiences. For those that offer registered or directed experiences this may be an even bigger challenge now that people are also adding in more self-directed experiences.

The additive element extends to messages audiences need to hear to be persuaded to engage. While pre-pandemic motivations to attend/participate centered on social, experiential and health motivations, those are now supplemented with desires to escape, be uplifted, and relieve stress.

Why this matters: The consumer mindset is simply getting cloudier in these darker periods. Their initial motivations and behaviours won't simply disappear. At the same time, the current contexts must be accounted for. This means your engagement efforts need to reflect their innate motivations, show how you can meet current state and still communicate safety.

4.

Contexts framing marketing in this environment

Not surprisingly, approaches to marketing will be affected by the current contexts. Messages need to be shifted, media strategies evaluated, and some types of voices changed.

- Marketers need to remember we have a market that is much more wary of ‘others’, concerned about safety, generally tired and frustrated, and looking for options to escape/stress relief. All the while, they need to know their options if restrictions shift. This means messages should take this into account.
- The nature of the restrictions also mean they need to get ‘approval’ to participate. Overall, medical authorities (their doctor, Dr. Hinshaw, AHS) are most trusted when it comes to knowing when to re-engage.
- Finally, they are most likely only to consider new activities if they hear from trusted sources – mainly in their cohort, but also from influencers in social media

Why this matters: Organizations are likely going to need a multi-layered media strategy that can reach influencers who can help propel the message. To be clear, an influencer strategy doesn’t mean social media a pure social media strategy. It means a strategy of messages and media that are repeatable to others.

5.

Engagement on hold.

While the immediate consequences of the current restrictions are obvious, there is an interesting sentiment among many (74%) that ‘life’ is on pause right now. This is likely a reflection of the pandemic as a whole and not merely the current restrictions. Similarly, larger proportions are likely to go back to the things they used to do and many who can’t wait to rediscover the experiences in their community. Ultimately, they are all signs of pent-up demand.

In the meantime, they are adding to their repertoire of activities. At least 39% are exploring other things to do right now – most are heading outdoors (66%), going online (50%) or exploring new hobbies/learning altogether (58%)

Why this matters: Organizations have to be prepared to re-engage in stages. When current restrictions lift there will be some appetite to explore and potentially opportunities to meet them online or outdoors. In a post-pandemic environment, audiences are very likely to get active again.

6.

Travel within the province is an option

With the current restrictions in place travel behaviours are clearly curtailed – only 34% say they are currently planning to travel within the province. But this shouldn't mean they won't consider it. In fact, this is an option for 74% of the market. To drive this behaviour audiences need to see it as an opportunity to escape or get away from everyday life. Social motivations (seeing friends or family) are also a well known motivator.

- Interestingly outdoor activities like skiing, skating, snowmobiling and even dog-sledding all figure prominently.
- The most important variables for finalizing a decision (beyond the current restrictions lifting) are flexibility (flexibility in booking dates and assurances about cancellation fees that give flexibility) and safety.

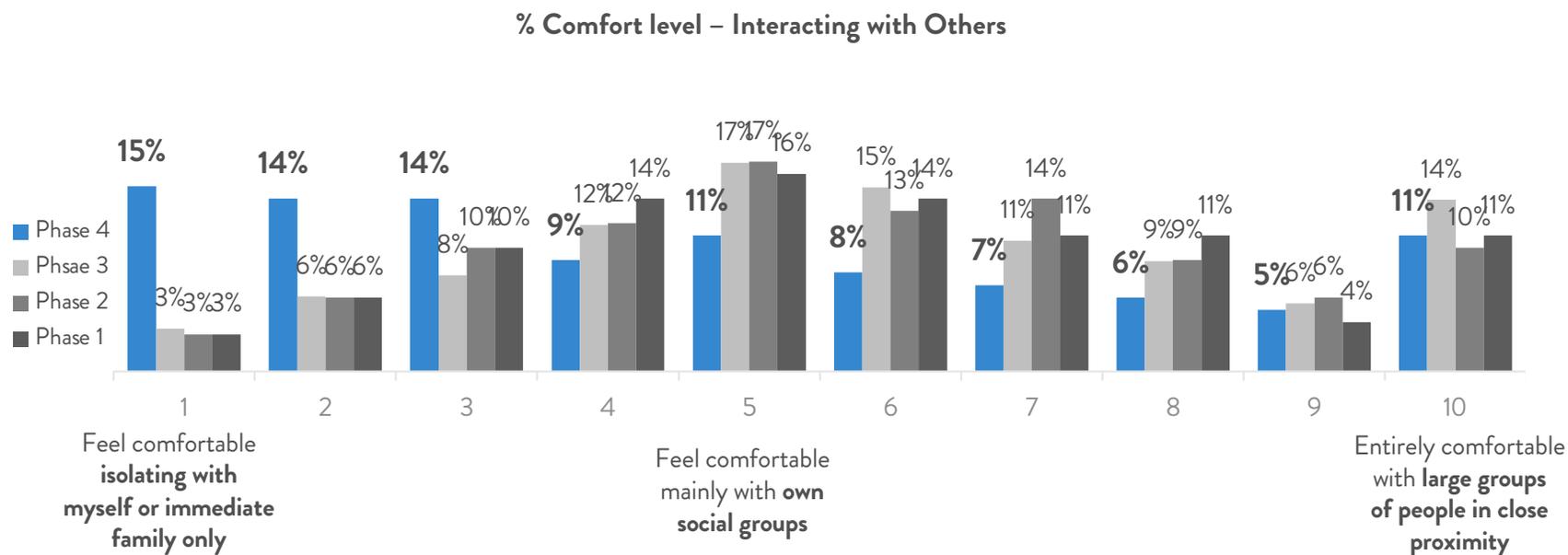
Why this matters: Focusing on broad messages that reflect a drive to escape everyday stresses and deliver on social motivations will work well to help motivate intra-provincial travel. Reinforcing these main messages with reassurances about flexibility in booking and safety will also be helpful to finalize a decision.

A person with curly hair is seen from the side, using a laptop with a tablet attached. The tablet screen shows a video call with another person. The scene is set in a modern office environment with a desk and some office supplies in the background.

**Comfort levels, risk tolerance,
and consumer mindset**

Comfort levels shift significantly as the number of cases rise and restrictions are enacted

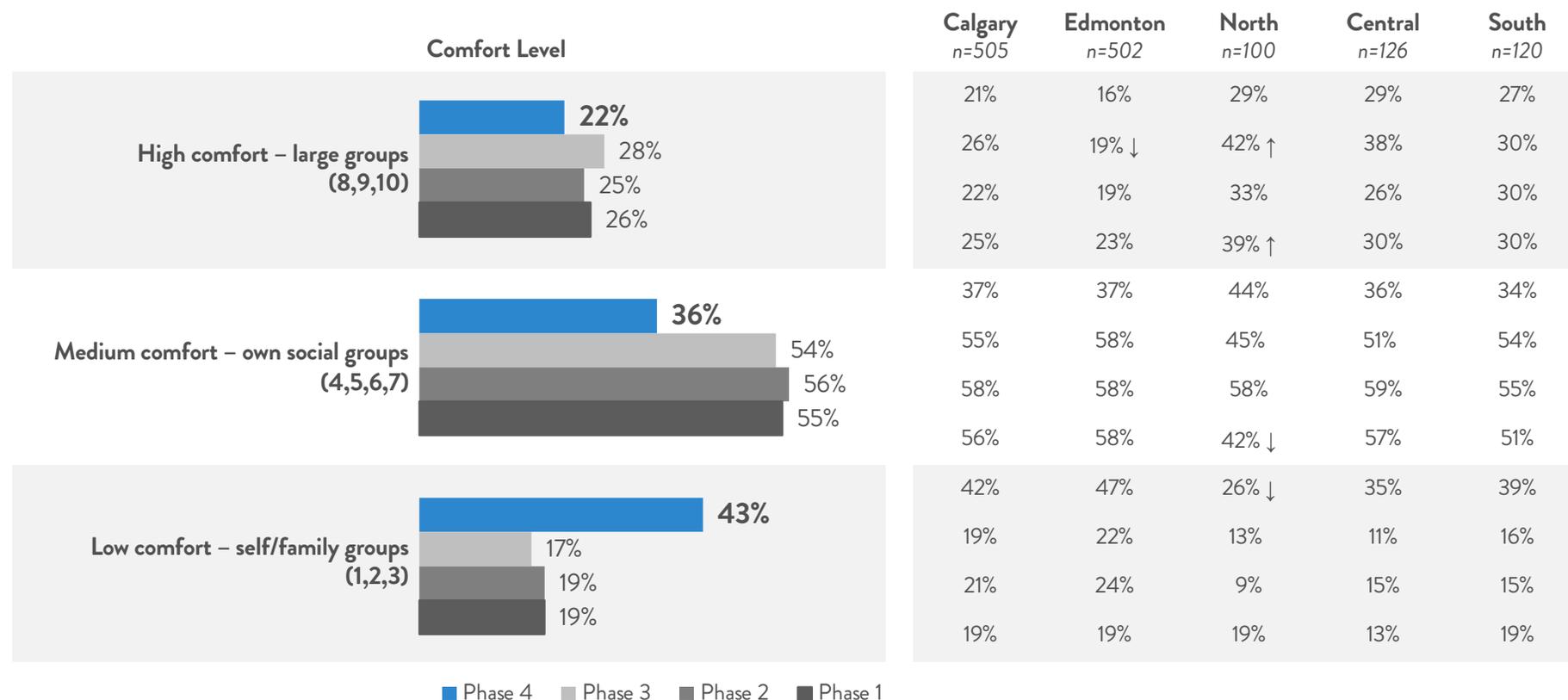
Albertans who are comfortable in large groups remain steady in that mindset, but the middle group has even become wary of small groups and shifted to only family interactions (in accordance with restrictions).



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=1015)

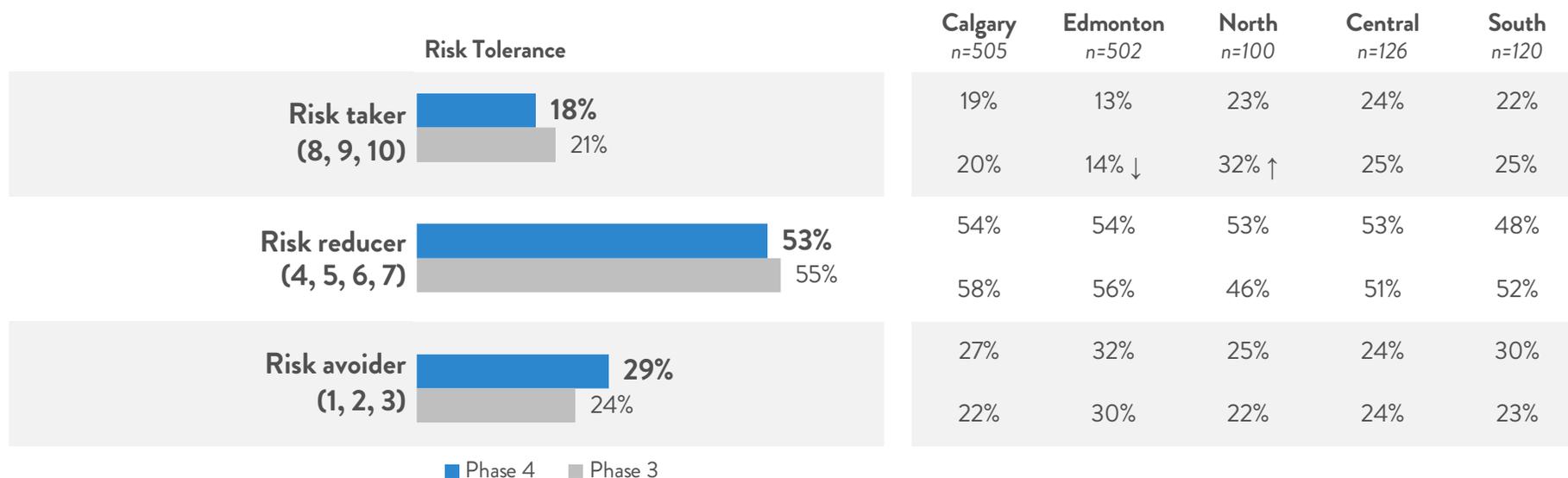
Comfort levels are shifting in all areas of the province – but the biggest shifts are recorded in Edmonton and Calgary.



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=1015). Note: Calgary + Edmonton include supplemental sample

Yet Albertans are approaching engagement in a similar manner despite the rising number of cases

The majority of Albertans continue to fall into the risk reducer category – they are still willing and want to participate if the activity aligns with their tolerance for risk and restrictions allow. Organizations should continue plans to engage audiences based on risk tolerance.

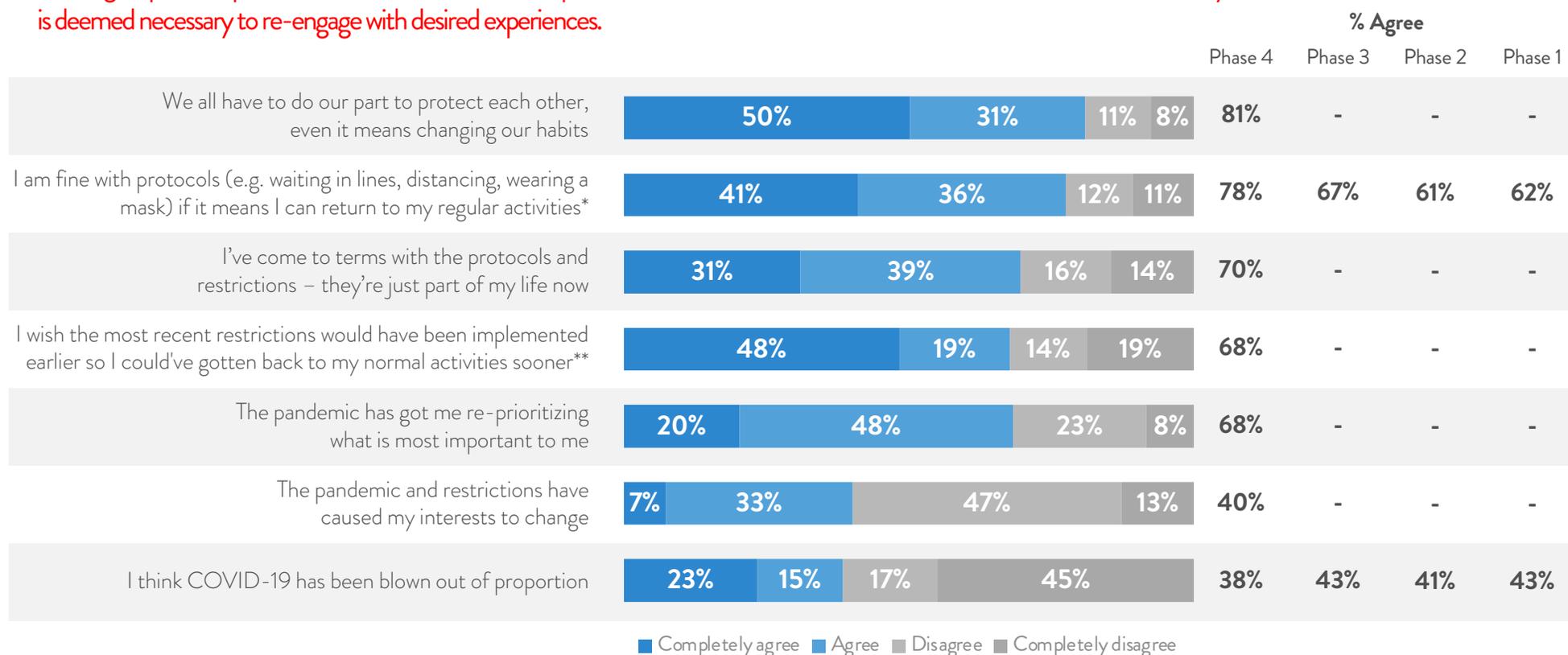


AVERAGE RISK TOLERANCE: In general, how would you consider your individual level of risk tolerance in day-to-day life? How would you rate your risk of disease with respect to COVID-19? Now thinking about the activities you participate in and value most, how would you assess their overall importance?

Base: Main sample (n=1015). Note: Calgary + Edmonton include supplemental sample

Acceptance of protocols and restrictions is growing. A strong sense of community is also emerging.

Building on previous phases, Albertans continue to accept the mandated health measures in order to return to activities – they will do whatever is deemed necessary to re-engage with desired experiences.



*Slight wording change **Added to the survey mid-fielding on December 10th

Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.

Base: Main sample (n=1015)

Attitudes align with risk tolerance levels, getting used to protocols/restrictions and caseload density: Risk taking Albertans have an individualistic stance on the pandemic and are less willing to come to terms with protocols. City centres are more accepting of protocols and aware of the community risk

	% Agree	Total Alberta	Risk Tolerance			Region				
			High n=217	Medium n=541	Low n=257	Calgary n=505	Edmonton n=502	North n=100	Central n=126	South n=120
We all have to do our part to protect each other, even it means changing our habits	81%		40% ↓	89% ↑	99% ↑	84%	85%	71% ↓	71% ↓	77%
I am fine with protocols (e.g. waiting in lines, distancing, wearing a mask) if it means I can return to my regular activities*	78%		39% ↓	86% ↑	92% ↑	80%	83% ↑	67% ↓	70%	73%
I've come to terms with the protocols and restrictions – they're just part of my life now	70%		23% ↓	75% ↑	97% ↑	74% ↑	76% ↑	48% ↓	61%	63%
I wish the most recent restrictions would have been implemented earlier so I could've gotten back to my normal activities sooner**	68%		29% ↓	72%	90% ↑	67%	73%	55%	57%	75%
The pandemic has got me re-prioritizing what is most important to me	68%		35% ↓	70%	92% ↑	71%	73%	58%	58% ↓	68%
The pandemic and restrictions have caused my interests to change	40%		28% ↓	38%	55% ↑	39%	42%	40%	32%	36%
I think COVID-19 has been blown out of proportion	38%		92% ↑	34% ↓	4% ↓	34%	32%	61% ↑	50% ↑	44%

*Slight wording change **Added to the survey mid-fielding on December 10th
Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.
Base: Main sample (n=1015)

Demographic differences also stand out: 35-54 year old males continue to be less concerned about pandemic's severity, opposed by younger females who show higher degrees of social acceptance and adaptation to the situation

	% Agree	Total Alberta	Female			Male		
			18-34 n=153	35-54 n=180	55+ n=167	18-34 n=146	35-54 n=191	55+ n=169
We all have to do our part to protect each other, even it means changing our habits	81%		95% ↑	83%	87%	79%	68% ↓	75%
I am fine with protocols (e.g. waiting in lines, distancing, wearing a mask) if it means I can return to my regular activities*	78%		90% ↑	81%	81%	77%	64% ↓	74%
I've come to terms with the protocols and restrictions – they're just part of my life now	70%		86% ↑	71%	75%	66%	52% ↓	70%
I wish the most recent restrictions would have been implemented earlier so I could've gotten back to my normal activities sooner**	68%		89% ↑	69%	63%	65%	51% ↓	64%
The pandemic has got me re-prioritizing what is most important to me	68%		84% ↑	76%	72%	66%	52% ↓	61%
The pandemic and restrictions have caused my interests to change	40%		44%	39%	44%	39%	34%	42%
I think COVID-19 has been blown out of proportion	38%		20% ↓	34%	32%	38%	60% ↑	46%

*Slight wording change **Added to the survey mid-fielding on December 10th

Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.

Base: Main sample (n=1015)

Impact of protocols and restrictions

LET'S KEEP
OUR SEASON SAFE!



FACE COVERINGS ARE REQUIRED



PRACTICE PHYSICAL DISTANCING



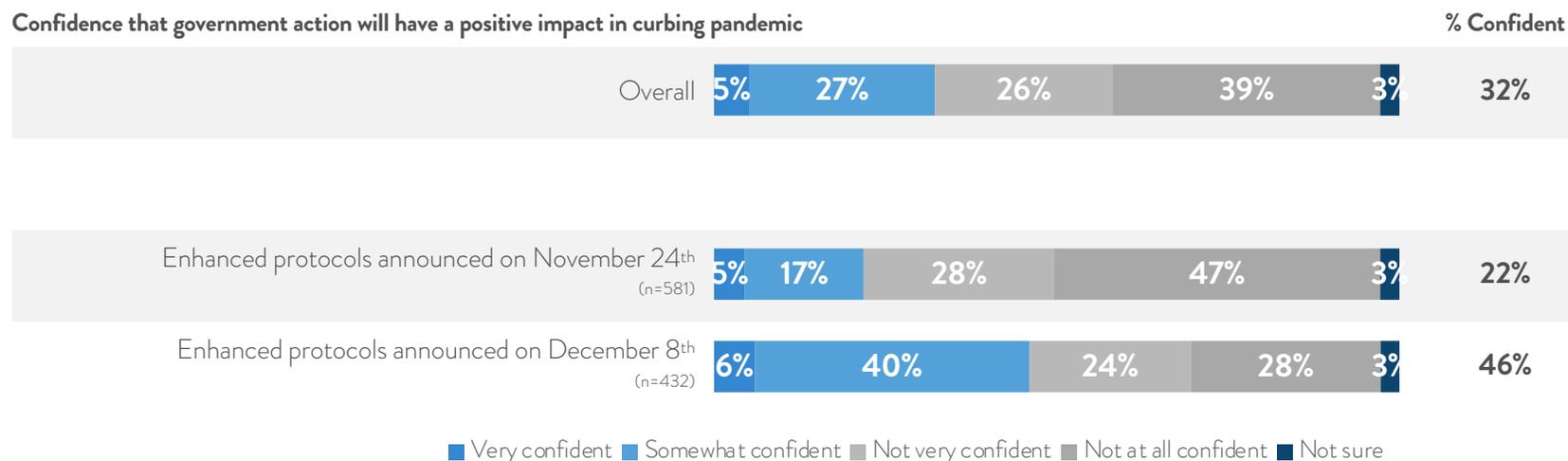
BE WISE. SANITIZE!



DO NOT ENTER IF YOU ARE
SICK OR MAY HAVE BEEN
EXPOSED TO COVID-19

Confidence increases with enhanced government protocols put in place to curb the pandemic, yet it lacks intensity

Directly aligned with caseload, Albertans residing in city centres with drastically increasing cases are less confident in government protocols and restrictions.

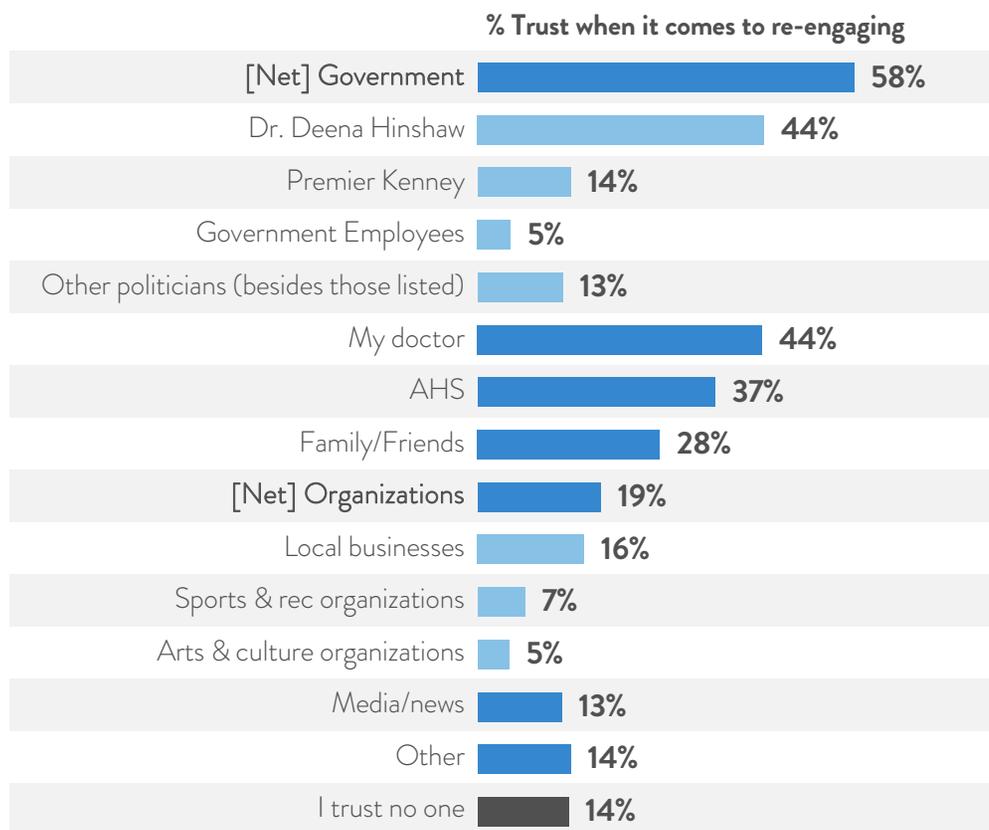


On [November 24th/December 8th] the Provincial government announced enhanced protocols and restrictions on social gathering to curb the pandemic. Overall, how confident are you that these kinds of government action will have a positive impact in curbing the pandemic here in Alberta?

Base: Main sample (n=1015)

Who do Albertans trust to tell them when to re-engage?

Those with a medical background – Dr. Hinshaw, a family doctor, or AHS – over others.

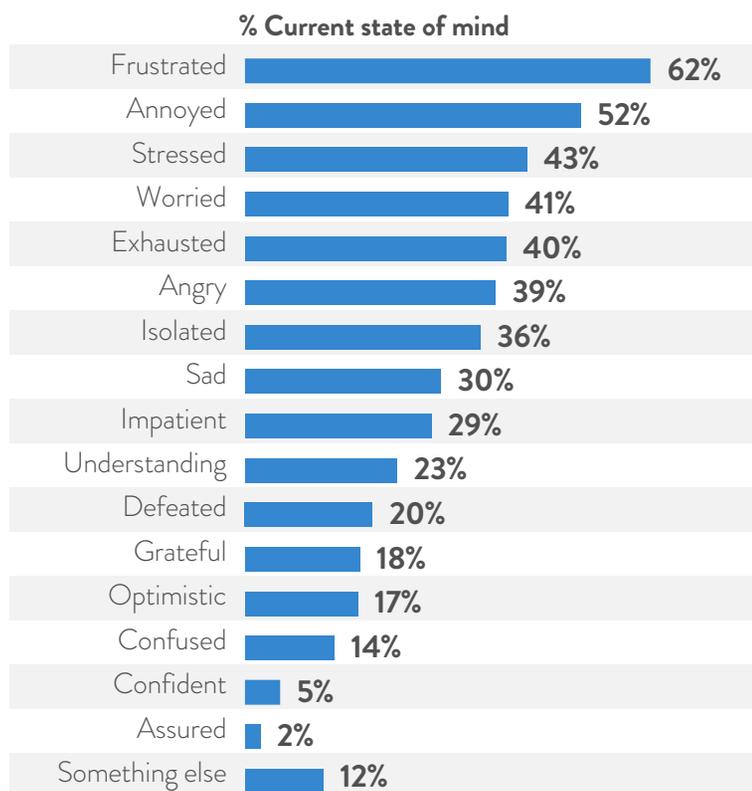


Who do you trust when it comes to re-engaging with experiences and activities? Please select all that apply.

Base: Main sample (n=1015)

Frustration and annoyance emerge as the dominant emotion

Emotions are stronger and more universal than earlier in the pandemic demonstrating the exasperated mindset of Albertans which greatly influences motivation to re-engage. There is an added sense of escapism which organizations can utilize in messaging.



Risk Takers

Frustrated (77%), annoyed (73%), angry (61%), impatient (51%), and stressed (36%)

Risk Reducers

Frustrated (61%), annoyed (50%), stressed (45%), exhausted (45%), and worried (39%)

Risk Avoiders

Worried (61%), frustrated (54%), stressed (46%), annoyed (37%), and isolated (37%)
Also more likely to be understanding and grateful

As the pandemic progresses things change – case numbers go up and down, protocols become more strict or less. What words best describe how you are feeling right now?

Please select all that apply.

Base: Main sample (n=1015)

Emotions align with attitudes towards government protocols: There is a slight shift to a positive outlook, and less frustration, with confidence in enhanced protocols

% Current state of mind	Confidence in Gov't Protocols		Enhanced Protocols (Dec. 8th)	
	Confident (n=325)	Not confident (n=659)	Pre (n=524)	Post (n=491)
Frustrated 62%	52% ↓	68% ↑	67% ↑	58% ↓
Annoyed 52%	47%	54%	51%	52%
Stressed 43%	42%	45%	45%	42%
Worried 41%	44%	39%	41%	40%
Exhausted 40%	40%	41%	40%	40%
Angry 39%	24% ↓	46% ↑	40%	37%
Isolated 36%	38%	36%	34%	39%
Sad 30%	32%	29%	30%	30%
Impatient 29%	26%	31%	29%	29%
Understanding 23%	30% ↑	21% ↓	21%	26%
Defeated 20%	15%	22%	21%	19%
Grateful 18%	22%	16%	15%	21%
Optimistic 17%	26% ↑	13% ↓	13% ↓	21% ↑
Confused 14%	12%	15%	12%	15%
Confident 5%	7%	5%	5%	6%
Assured 2%	4%	2%	2%	3%
Something else 12%	7%	15%	14%	11%

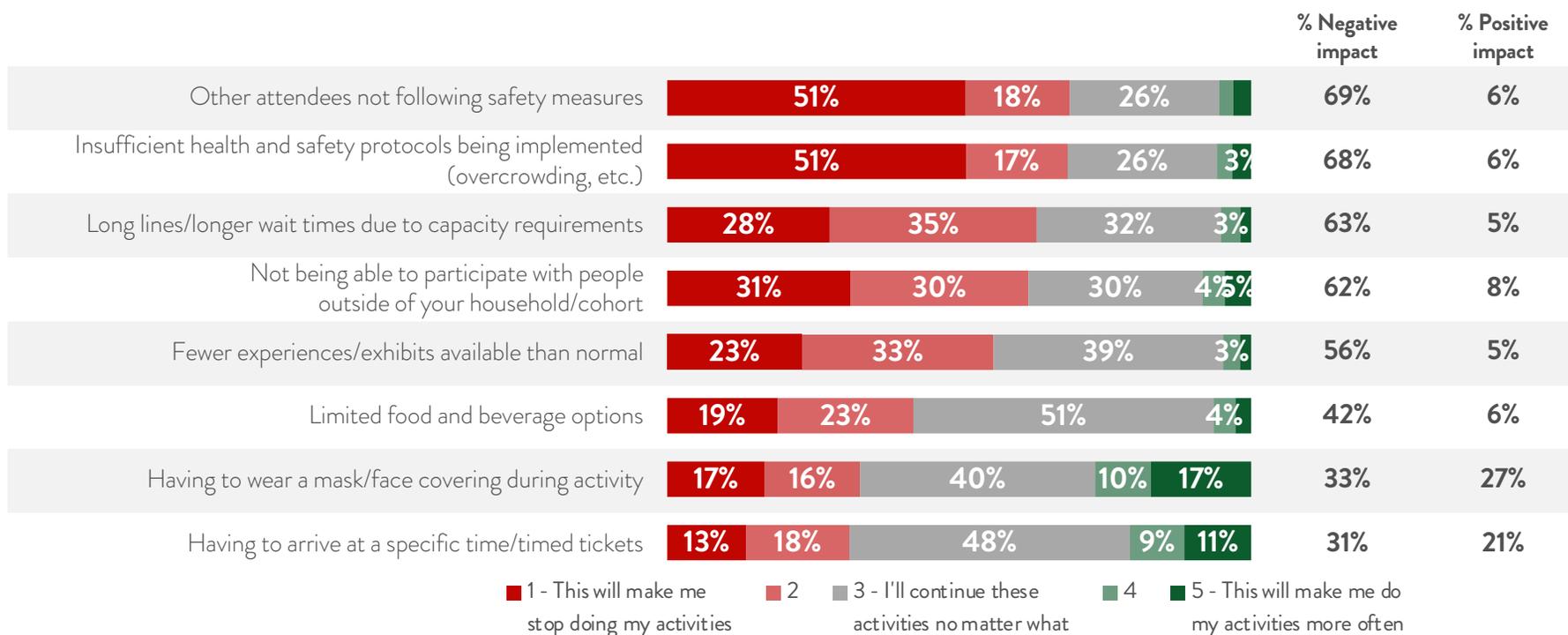
As the pandemic progresses things change – case numbers go up and down, protocols become more strict or less. What words best describe how you are feeling right now?

Please select all that apply.

Base: Main sample (n=1015)

Health and safety protocols are top priority for Albertans to participate

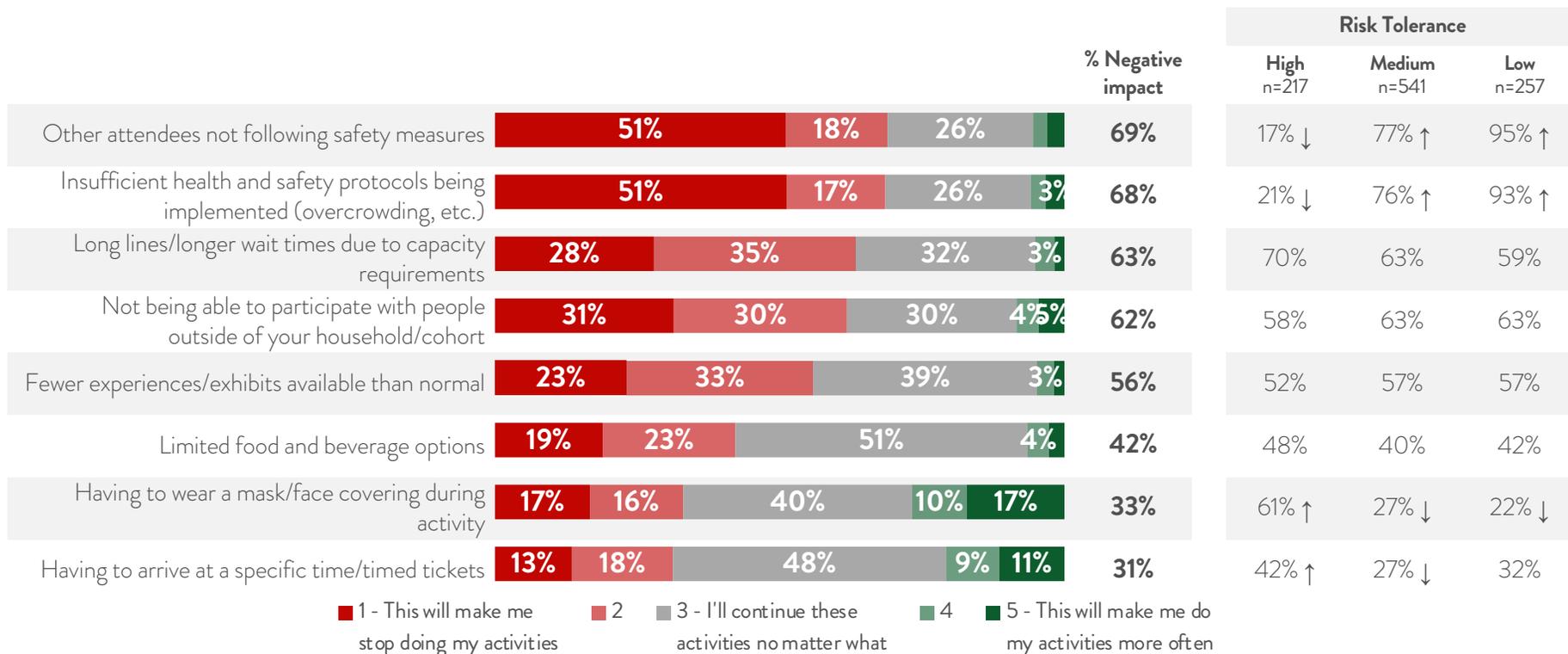
The basic logistics of operating events in this environment (mask wearing, timed tickets, fewer options) now appear common place and widely accepted as part of the experience. What dissuades audiences are those who don't follow the rules or an absence of protocols (either of which may be a safety risk.)



Over the past few months, organizations have been navigating safety measure that can impact guest experience. What impact, if any, do the following have on your willingness to participate in experiences (assuming restrictions allow)?

Base: Main sample (n=1015)

Impact aligns with risk tolerance levels: Risk taking Albertans are less fussed about insufficient protocols, rather view safety measures – timed tickets, mask wearing – as a hinderance.



Over the past few months, organizations have been navigating safety measure that can impact guest experience. What impact, if any, do the following have on your willingness to participate in experiences (assuming restrictions allow)?

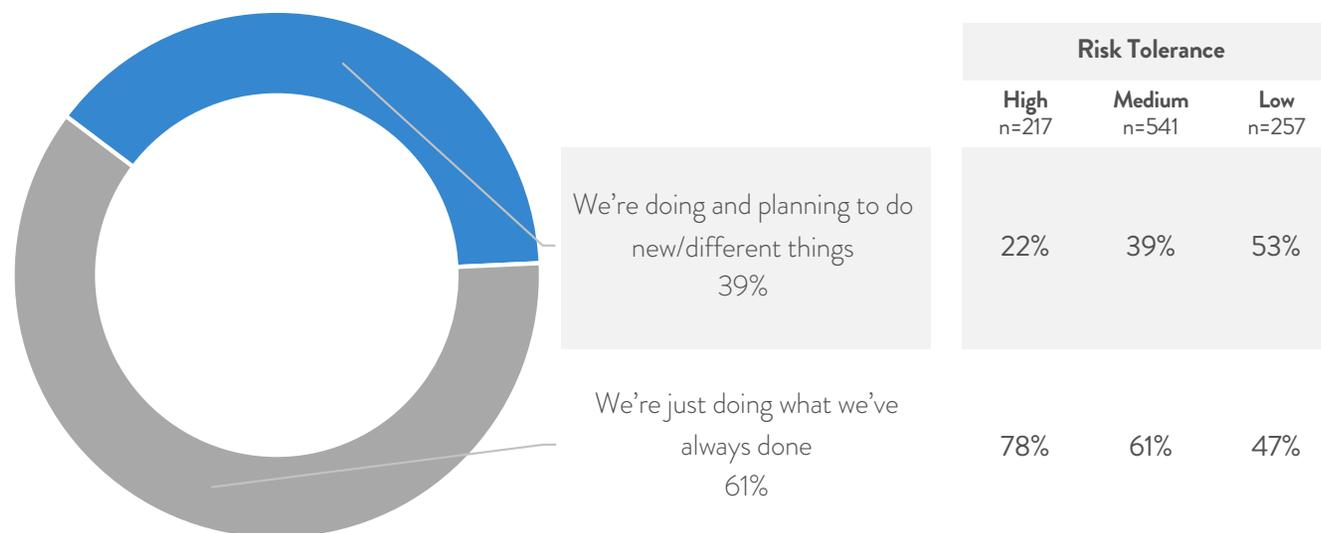
Base: Main sample (n=1015)

Assessing activities



With restrictions and higher caseloads notable proportions are adding other activities to substitute what they cannot do.

Interestingly, risk takers are clinging to their usual routines and activities while risk avoiders have greater appetite for new/different experiences – they are adapting their interests and looking for innovative ways to enjoy usual activities to align with the associated risk.

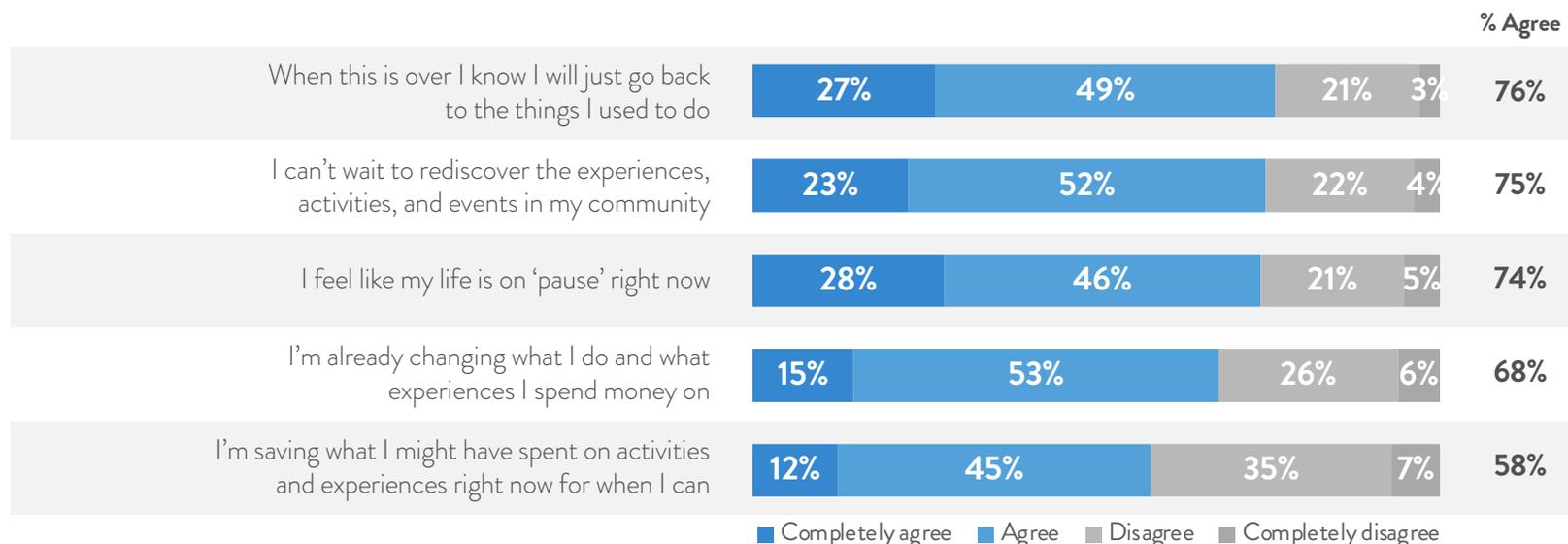


Given the pandemic and winter approaching we're interested in understanding different and new things than you typically do this time of year. By this we mean new activities, new hobbies, something you used to do as a kid, etc. Thinking ahead to the next few months, are you...?

Base: Main sample (n=1015)

With the experience economy largely on ‘pause,’ audiences are keen to rediscover their old activities. While access to activities is paused, the drive to pursue experiences is not and 2/3’s are finding things to do while they wait.

As audiences add new activities/experiences, the big question moving forward is the degree to which organizations will have to compete with these new experiences.



Below are a few things people might say about the current situation and how they spend their time and money – please tell us if you agree or disagree
Base: Main sample (n=1015)

Adding new experiences is greatest among those who are less risky: They are more likely to change habits, while those who are more risky have a stronger urge to get back to what they used to do.

	% Agree	Total Alberta	Risk Tolerance			Region				
			High n=217	Medium n=541	Low n=257	Calgary n=505	Edmonton n=502	North n=100	Central n=126	South n=120
When this is over I know I will just go back to the things I used to do	76%		89% ↑	75%	67% ↓	76%	72%	77%	84%	80%
I can't wait to rediscover the experiences, activities, and events in my community	75%		73%	76%	72%	77%	76%	80%	70%	76%
I feel like my life is on 'pause' right now	74%		77%	74%	72%	75%	75%	69%	68%	72%
I'm already changing what I do and what experiences I spend money on	68%		46% ↓	69%	84% ↑	69%	77% ↑	59%	60%	62%
I'm saving what I might have spent on activities and experiences right now for when I can	58%		45% ↓	60%	64%	60%	59%	43% ↓	47% ↓	60%

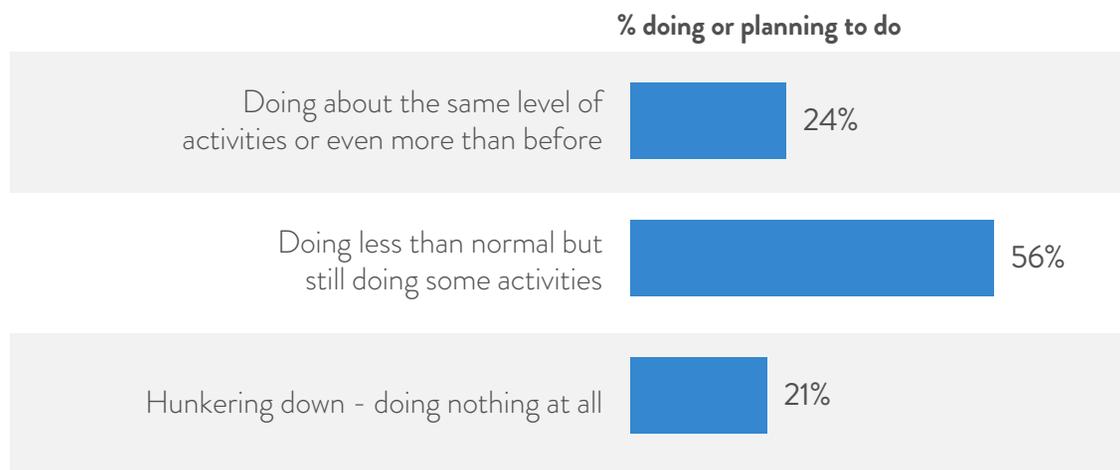
Below are a few things people might say about the current situation and how they spend their time and money – please tell us if you agree or disagree
Base: Main sample (n=1015)

Younger audiences could present a challenge: They are more likely to change habits and spend during the pandemic. (For every challenge there may be opportunity: particularly for organizations who can reach young experience seekers who are currently sampling new things.)

	% Agree	Total Alberta	Female			Male		
			18-34 n=153	35-54 n=180	55+ n=167	18-34 n=146	35-54 n=191	55+ n=169
When this is over I know I will just go back to the things I used to do	76%		66% ↓	75%	79%	72%	82%	83%
I can't wait to rediscover the experiences, activities, and events in my community	75%		81%	80%	70%	82%	71%	65% ↓
I feel like my life is on 'pause' right now	74%		73%	75%	72%	73%	74%	79%
I'm already changing what I do and what experiences I spend money on	68%		80% ↑	73%	64%	72%	59% ↓	60%
I'm saving what I might have spent on activities and experiences right now for when I can	58%		65%	57%	60%	64%	46% ↓	59%

Below are a few things people might say about the current situation and how they spend their time and money – please tell us if you agree or disagree
Base: Main sample (n=1015)

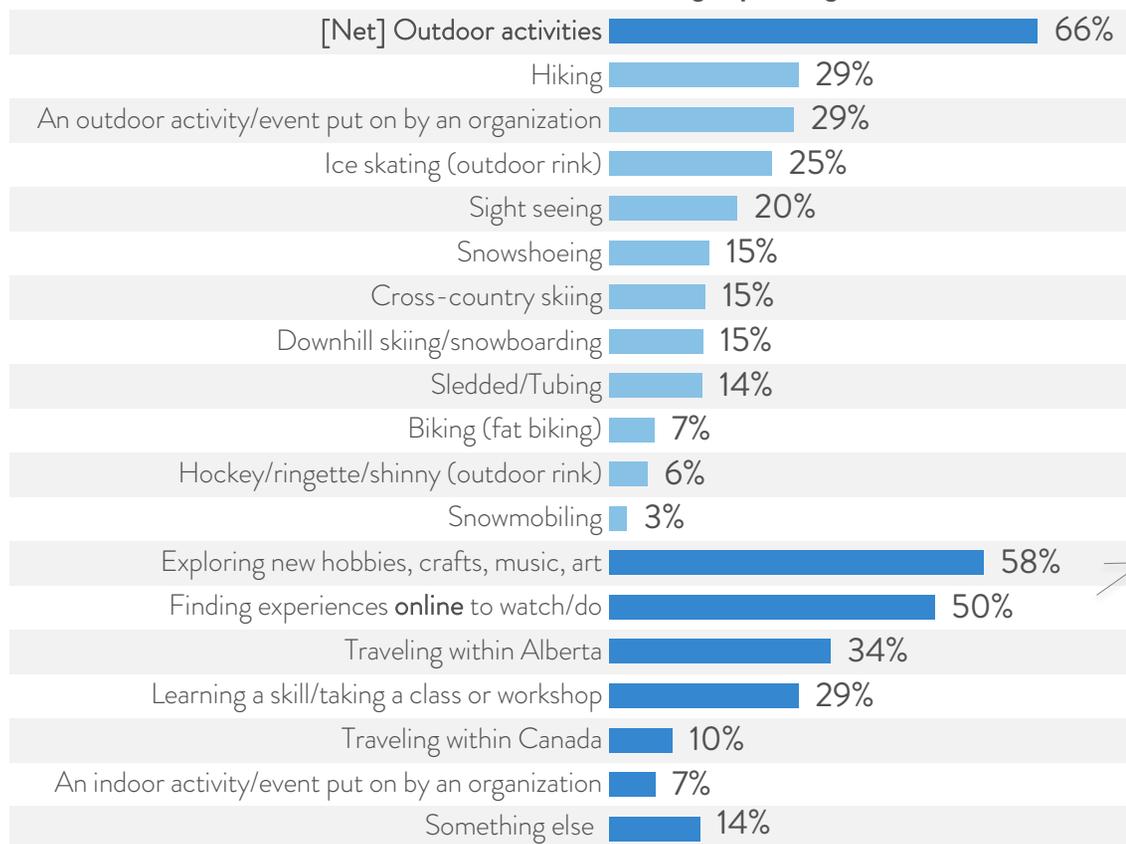
Only a small proportion of those who are doing what they've always done are limiting their experiences to nothing



You mentioned doing what you've always done. Are you...?
Base: Doing what they've always done (n=618)

Continued interest for outdoor experiences, but appetite for online isn't diminishing – increased interest in digital experiences as risk tolerance lessens

% doing or planning to do new activities



Most of these activities are self-directed – which is something to watch moving forward – particularly if your organization usually offers directed/registered activities.

Opportunity for experience organizations to innovate their experiences to digital

You mention you and your family/cohort are doing or planning to do new or different activities this year. Which of the following is new or different (or perhaps something you're doing more of)
Base: Doing or planning new or different activities (n=397)

Albertans are willing to brave the cold in order to engage day or night

The temperature considered 'too cold' in order to consider attending an outdoor event or activity is -13°C (provincial average for daytime and evening).

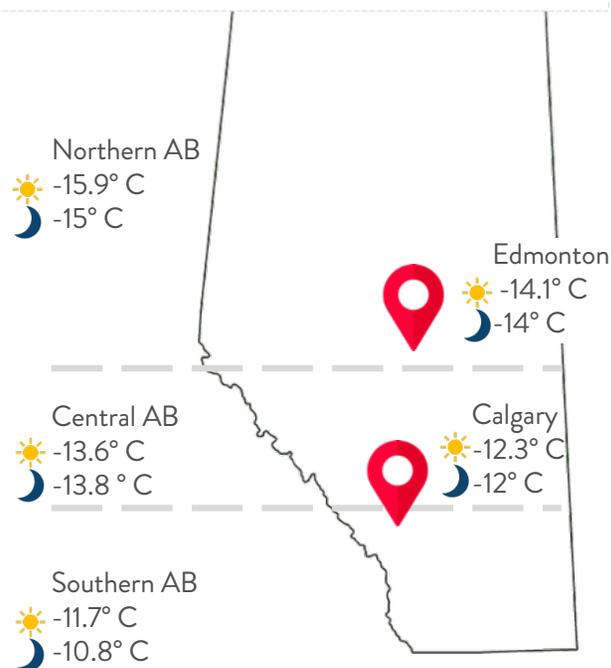
At what temperature will Albertans avoid outdoor events?

(Reported daytime/evening averages)

Provincial Averages:

 Daytime: -13°C

 Evening: -13.2°C



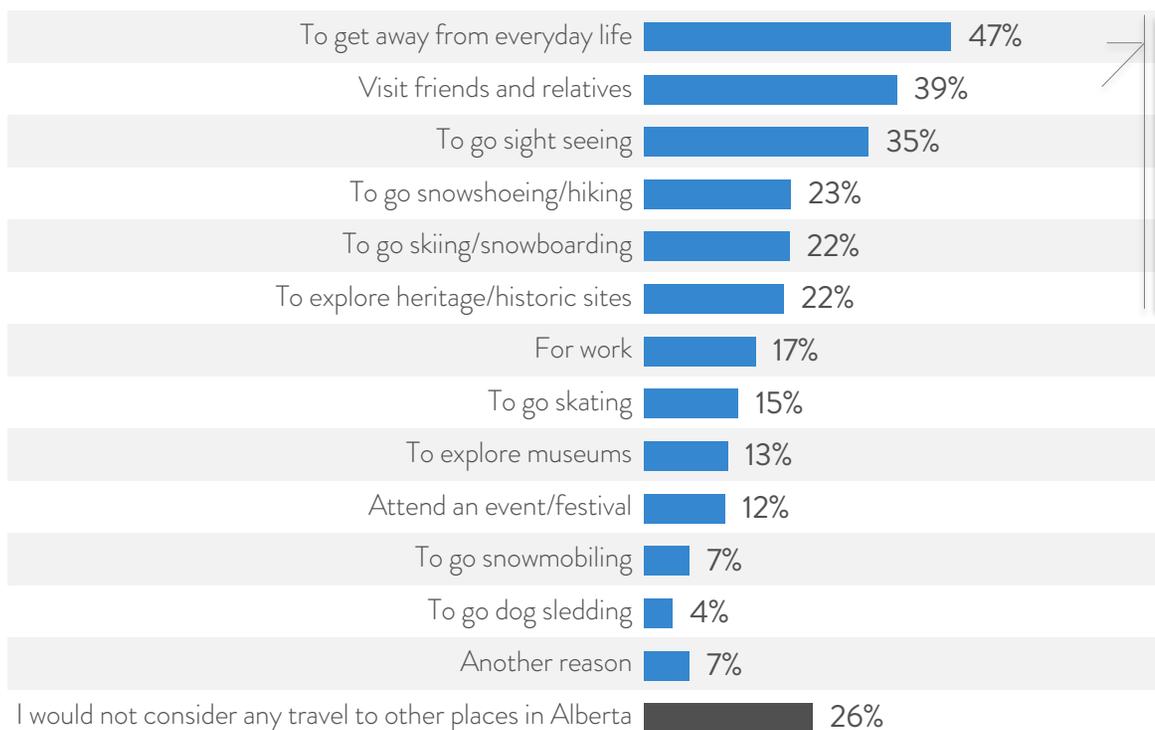
We know temperature has an impact on consideration to do outdoor activities or attend an outdoor event. Taking windchill, snow, etc. into consideration at what temperature is it too cold for you to consider going to an outdoor event/activity...?

Base: Would consider an outdoor activity... day (n=985); night (n=962)

Main motivators to explore the province focus on escapism and fulfilling social motivations

However, travel is directly aligned with risk. Albertans with a lower risk tolerance are less likely to consider travel.

% reasons to travel within Alberta

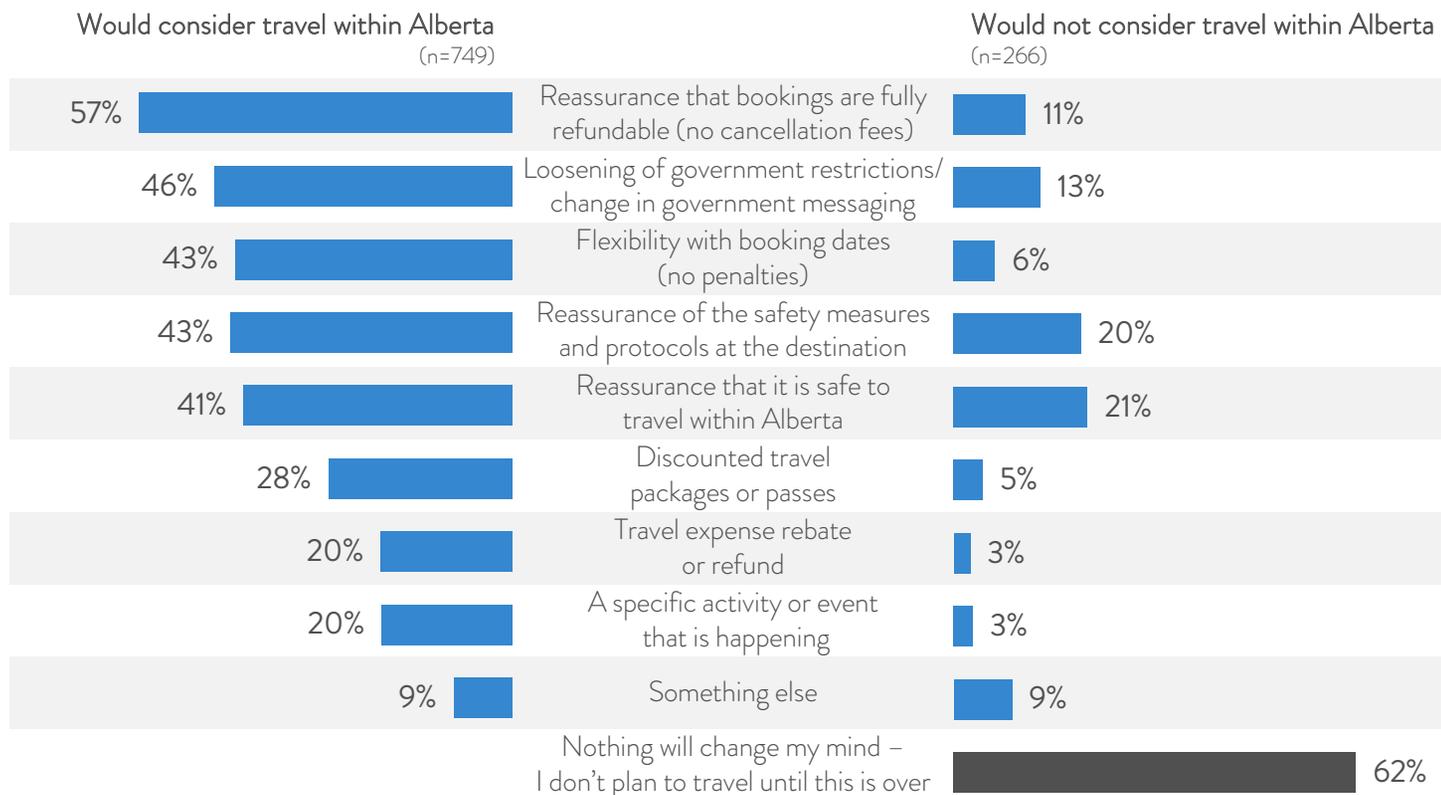


Albertans have varying degrees of interest in outdoor activities, but they share in common the need for a break and social connection. Communications to promoting travel in Alberta need to reinforce these motivators.

Some Albertans are considering travel to other places in the province in the next couple months (as restrictions allow). What kind of reasons or activities/experiences would help you make the decision to travel within Alberta?

Base: Main sample (n=1015)

Aside from loosening of government restrictions, flexibility is top priority when Albertans consider traveling, followed by assurance of safety



And what do you need to see or hear to finalize a travel decision?

You indicated you aren't planning to travel within Alberta. What do you need to see or hear to change your mind?

Base: Main sample (n varies)

A photograph of a woman in a striped shirt sitting at a desk, talking on a mobile phone. In the background, a man sits at another desk with his hand to his chin. In the foreground, a young boy with glasses is playing with a colorful toy on the desk. The scene is set in a home office with bookshelves and a desk with a laptop.

How to reach audiences?

Not surprisingly, each audience type needs a different message

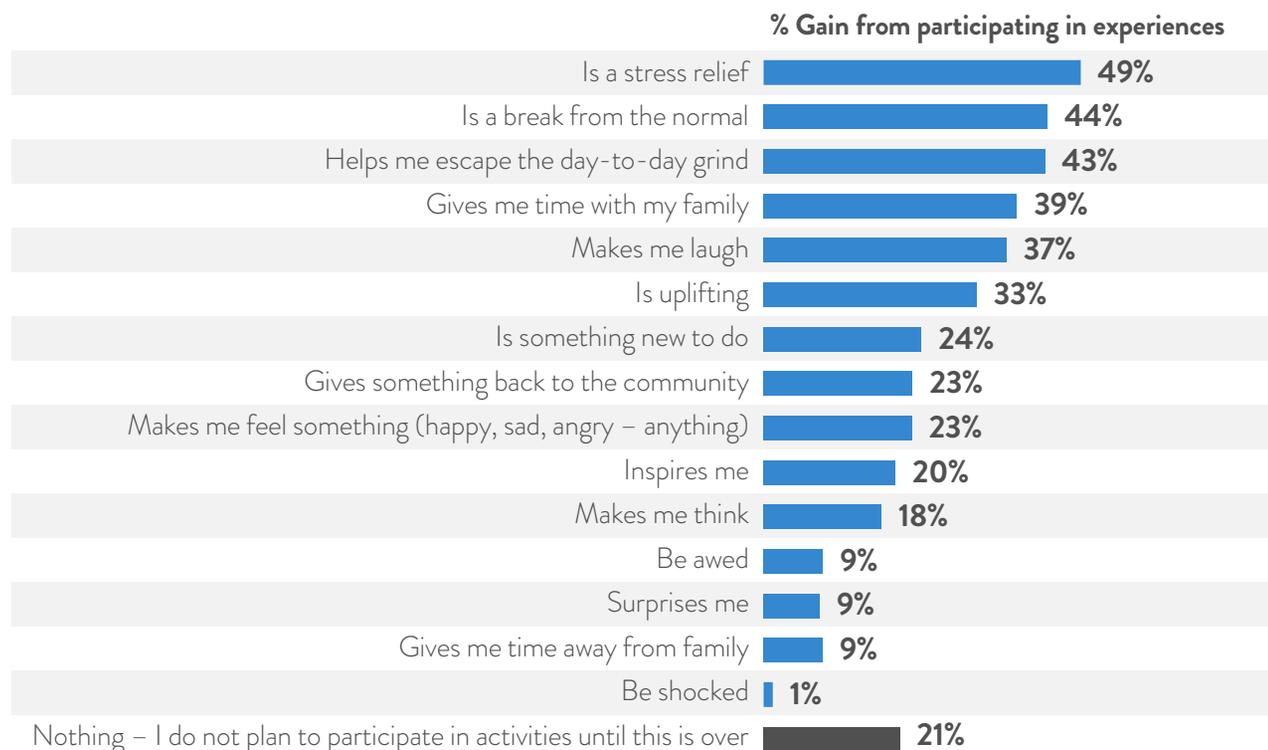
Risk reducers are closely evaluating options and making trade offs. They need organizations to communicate not only safety, but also flexibility, discount options, and an unhindered experience.

	% Increase willingness to participate	Risk Tolerance		
		High n=192	Medium n=520	Low n=253
Show me the protocols help keep me/cohort safe	45%	11% ↓	49% ↑	62% ↑
Show me the refund and cancellation policies	37%	37%	41% ↑	27% ↓
Offer me promotions to make it cost less	34%	39%	39% ↑	19% ↓
Show me that my experience may be better with fewer people around	32%	25%	35%	33%
Show me the protocols won't impact my experience	28%	27%	31% ↑	19% ↓
Offer me promotions to include/share it with my cohort	21%	21%	23%	17%
Show me I will have a unique and new experience	18%	14%	20%	16%
Show me it may be a new twist on what I've always done before	16%	8% ↓	19% ↑	16%
Remind me that lines really won't be that long	13%	9%	14%	12%
Something else	6%	7%	5%	6%
Nothing they say will make me want to engage as long as these protocols are in place	23%	34% ↑	17% ↓	26%

Besides telling you about the experience itself, what could organizations say or do to increase your willingness to participate (assuming restrictions allow)? Please select all that apply.

Base: Any rating of negative impact from any safety measure (n varies)

Stress relieve, escapism and connection are key benefits Albertans seek during restrictions



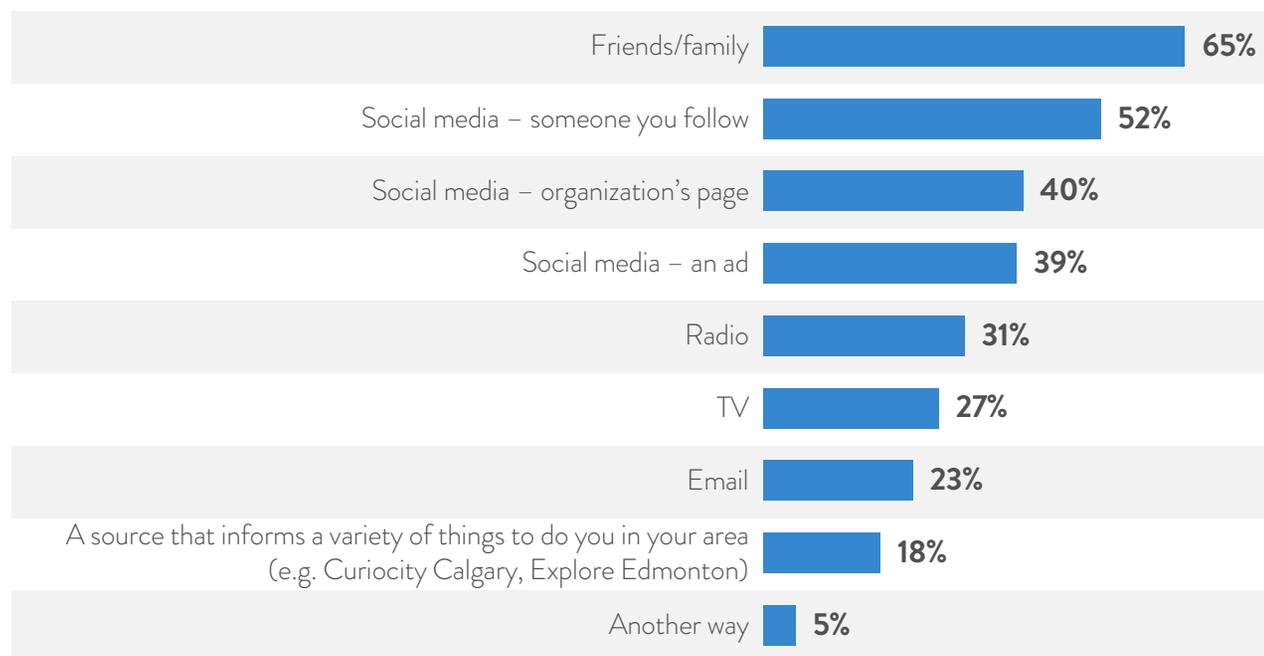
We know this is a tough time for everyone right now. Organizations in your area are focused on finding new ways to engage with you and provide you with something to do during further restrictions. Assuming an organization can assure you that they are following protocols, and everything is safe, what do you want to get out of participating in any activity during times like these?

Base: Main sample (n=1015)

Organizations that provide a safe and enjoyable experience will see the return through word of mouth

Albertans are discovering new activities through their friends/family or a familiar social media account. An organization’s paid marketing efforts will have a lesser reach than proving their experience to attendees who will in turn share with and recommend to others.

% Hear about new activities/events



Now these organizations will have to reach you in new ways, especially if it’s an organization that’s new to you. How do you typically hear about new activities/events that you’ve never done before?

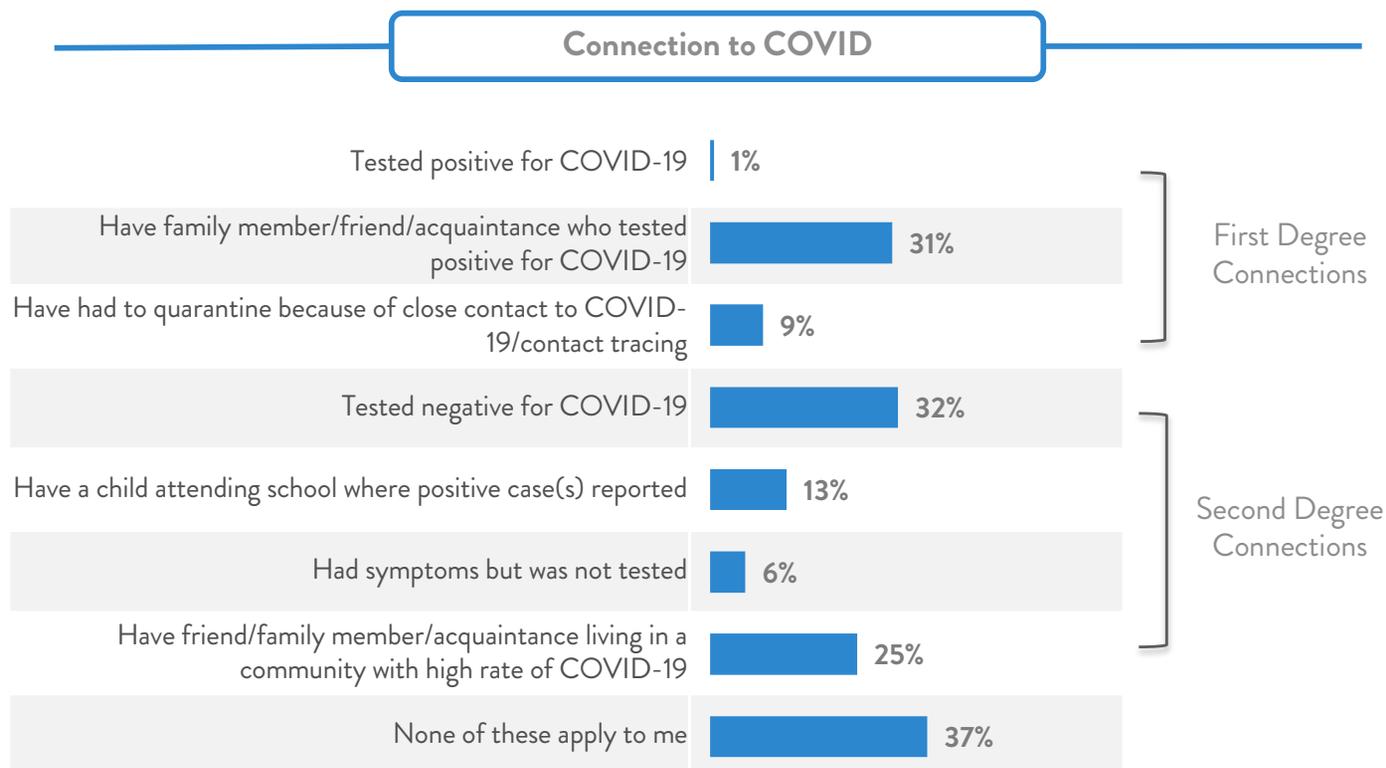
Base: Main sample (n=1015)

A photograph of a crowded grocery store aisle. In the foreground, a person in a grey jacket and white face mask is pushing a shopping cart. Behind them, a man in a black jacket and white face mask is also pushing a cart. To the left, a woman in a dark blue jacket and light blue face mask is looking towards the camera. The aisle is filled with other shoppers, many wearing masks, and red shopping carts. The background shows shelves stocked with goods. The text "Respondent Profile" is overlaid in white, bold, sans-serif font across the middle of the image.

Respondent Profile

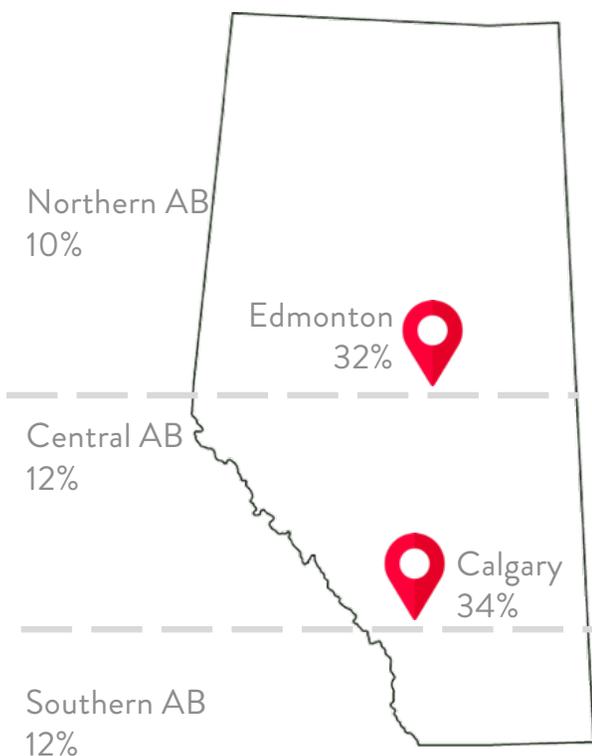
Profile of Key Characteristics:

As time passes, more and more Albertans have a connection to COVID-19 (63% of Albertans by the end of 2020)– either directly (positive test, known contact or quarantining) or indirectly (symptoms, school cases, etc.).



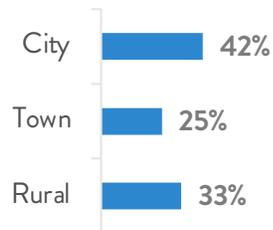
Who we heard from

Region

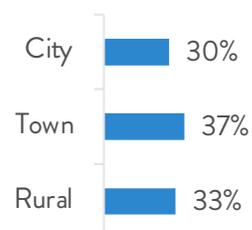


Community Type

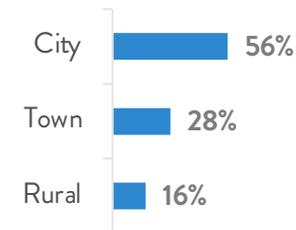
Northern AB



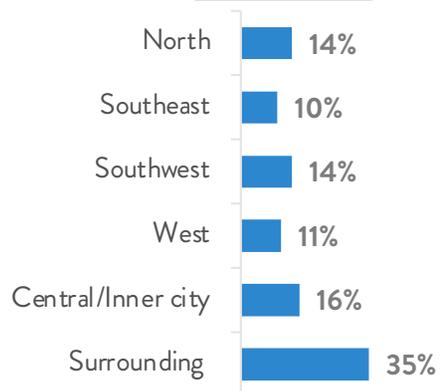
Central AB



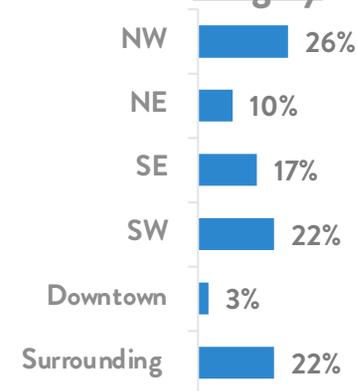
Southern AB



Edmonton



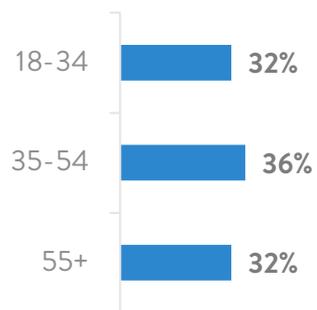
Calgary



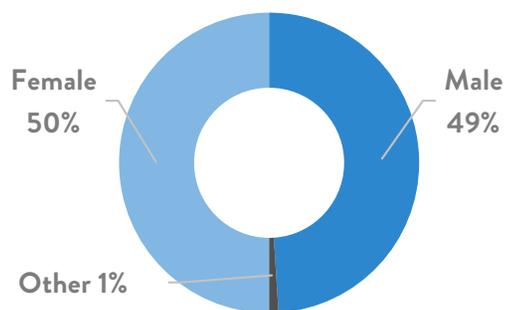
Base: Main sample (n=1015). Note: Calgary + Edmonton include supplemental sample

Who we heard from

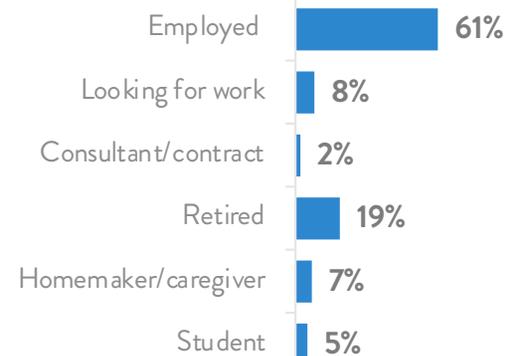
Age



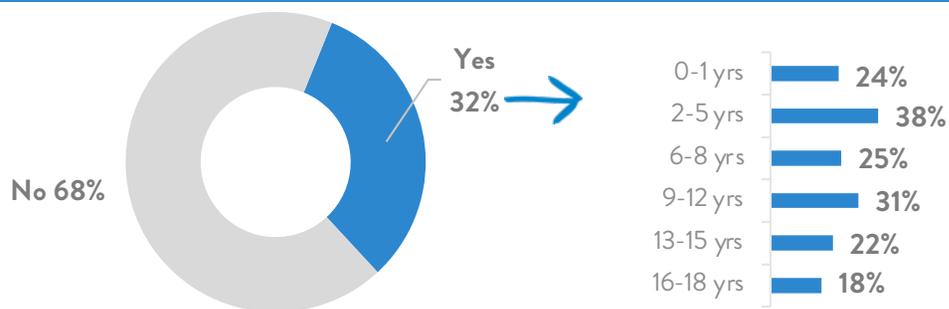
Gender



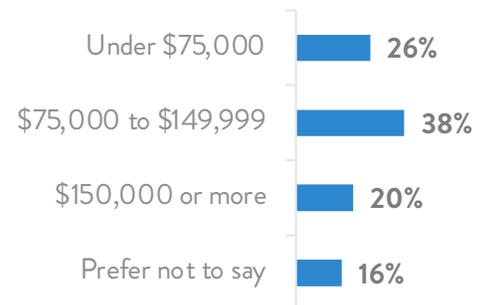
Employment



Children in the Household



Household Income



**Stone —
Olafson**

Understanding people. It's what we do.