



The NEW Experience Economy:

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

Phase 4 Results: Calgary
January 2021

Stone —
Olafson

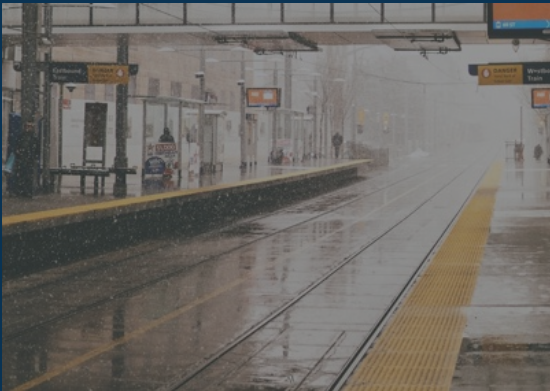
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Background & Purpose

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 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.

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 505 Calgary-specific surveys were collected (340 base surveys, 165 boost) from December 8th to 20th.

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:

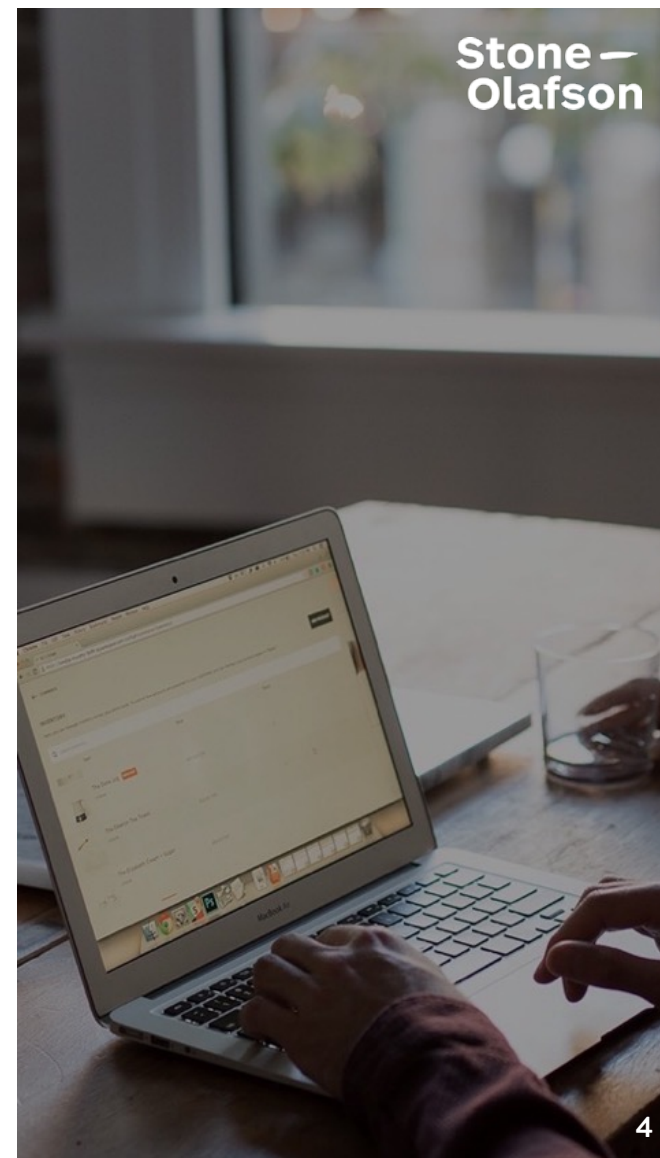
www.stone-olafson.com/insights

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 Calgary? Calgarians continue to closely mimic their fellow Albertans.

1.

Comfort levels drop, but risk tolerance is steady

Comfort levels shift significantly as the number of cases rise and restrictions are enacted. However, how Calgarians approach re-engagement has not changed.

They have come to terms with protocols and restrictions if it means they can re-engage, but are feeling frustrated, annoyed, stressed (like the rest of the province).

Benefits must address lower comfort, but also escapism to speak to their motivations.

2.

Engagement is on hold

Many Calgarians feel like their life is on pause right now. They are eager to return to their usual activities, but while current restrictions are in place, Calgarians are discovering new activities.

As restrictions ease, audiences are likely to be more comfortable engaging in their usual activities, but also have a new set of activities they enjoy.

For organizations, that means breaking through a larger competitive set to capture the attention of their audiences

3.

Contexts framing marketing

Audiences in Calgary are wary, frustrated, and concerned about safety. All the while, they are looking for options to escape and want to know their options if restrictions start to lift.

They rely on medical professionals to let them know when it's safe to re-engage but turn to their trusted sources (friends/ influencers) on what to re-engage with.

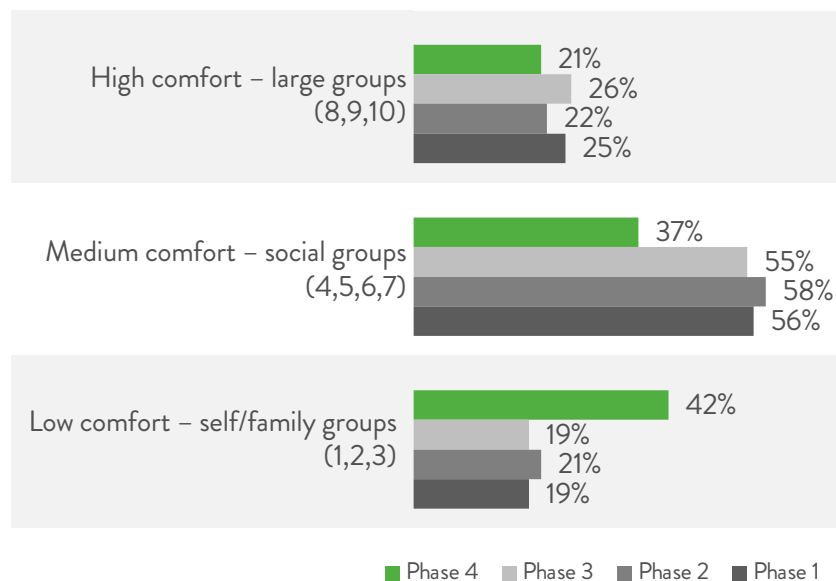
Organizations are likely going to need a multi-layered media strategy that can reach influencers who can help propel the message. Not pure social media, but messages that are repeatable to others.

Comfort levels, risk tolerance, and consumer mindset

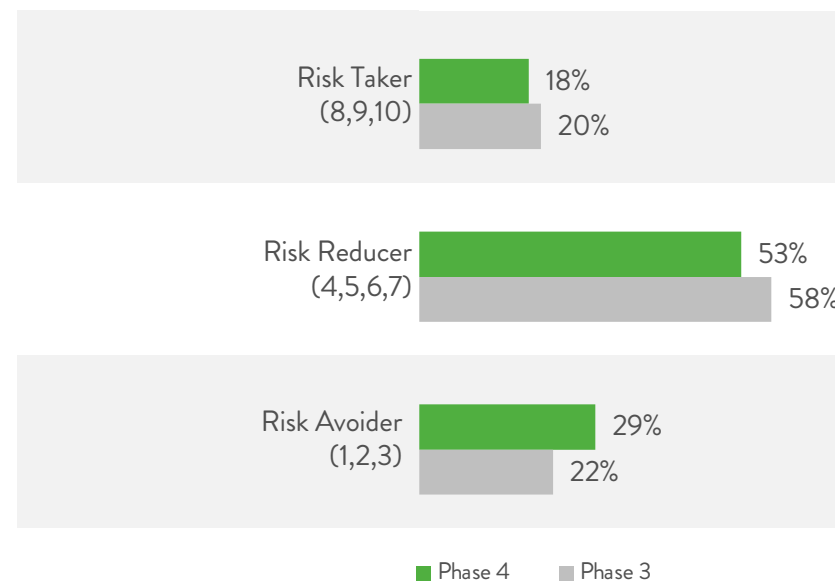


Comfort levels are shifting, yet Calgarians are approaching engagement in a similar manner despite the rising number of cases

Comfort Level

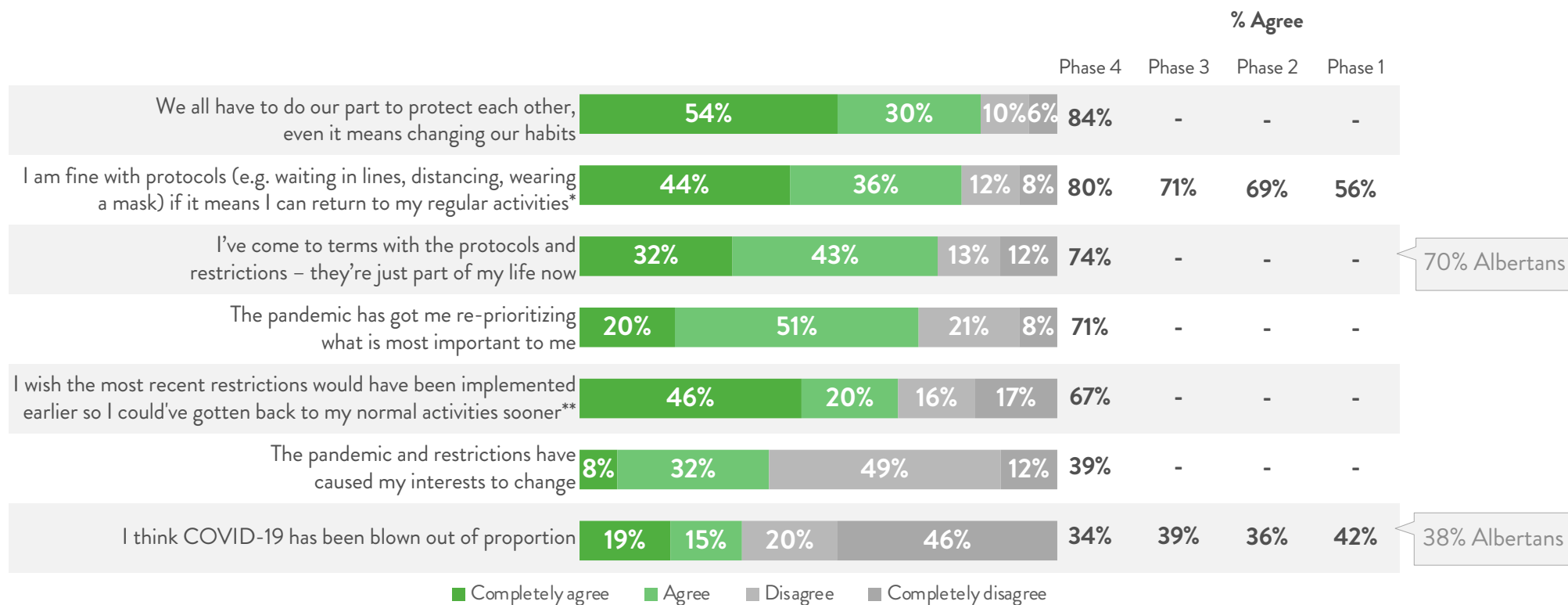


Risk Tolerance



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? Average risk tolerance score. Base: Calgary (n=505)

Acceptance of protocols and restrictions is growing, more so in Calgary compared to the rest of the province



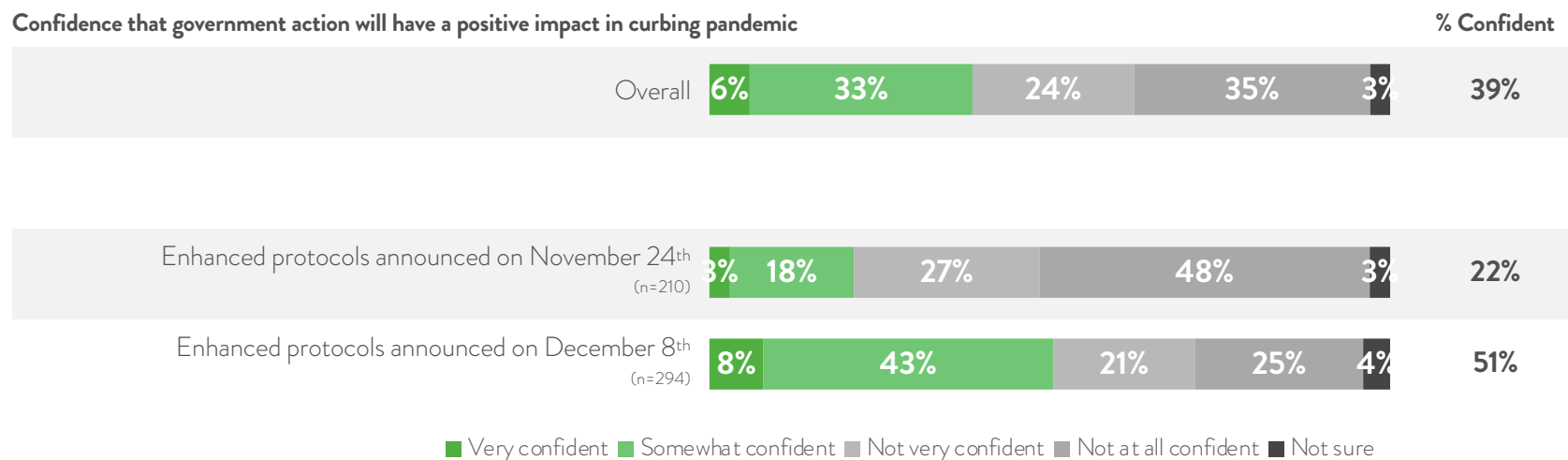
*Slight wording change from phase 3 **Question added mid fielding
Below are a few statements about the pandemic. Please tell us if you agree or disagree with each one.
Base: Calgary sample (n=505)

KANANASKIS COUNTRY
→ Highway 40 / Highway 1
→ Trout Falls Treatment
→ Kananaskis Wilderness Hostel
→ Kananaskis Village
→ Pinesong Kananaskis
→ Kananaskis Lodge
→ Kananaskis Nordic Spa

Impact of protocols and restrictions

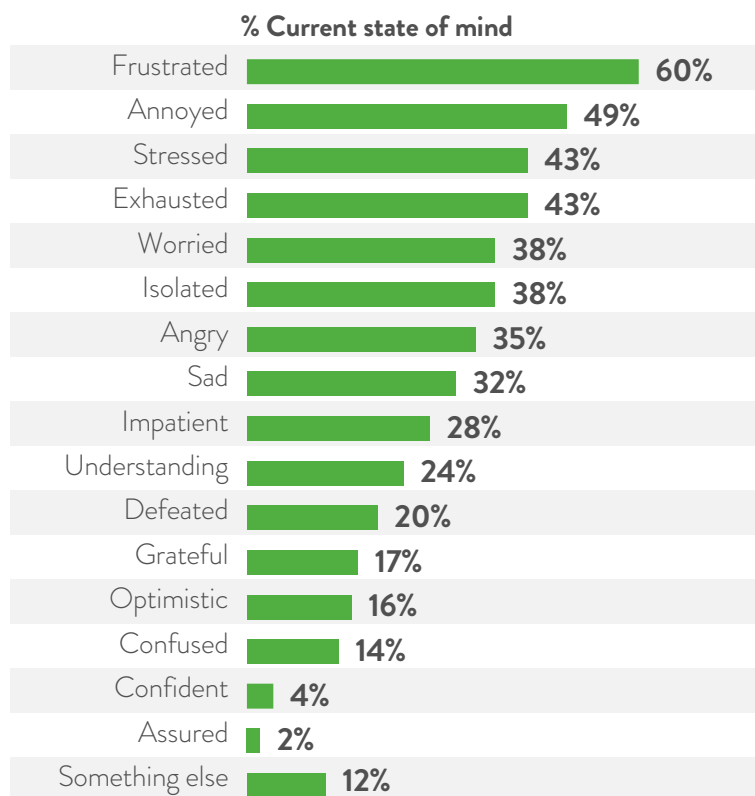


Confidence increases with enhanced government protocols put in place to curb the pandemic, yet it lacks intensity



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: Calgary (n=504)*

Frustration and annoyance emerge as the dominant emotion and are more universal than emotions earlier in the pandemic



Risk Takers

Frustrated (80%), annoyed (69%), angry (53%), impatient (47%), and exhausted (39%)

Risk Reducers

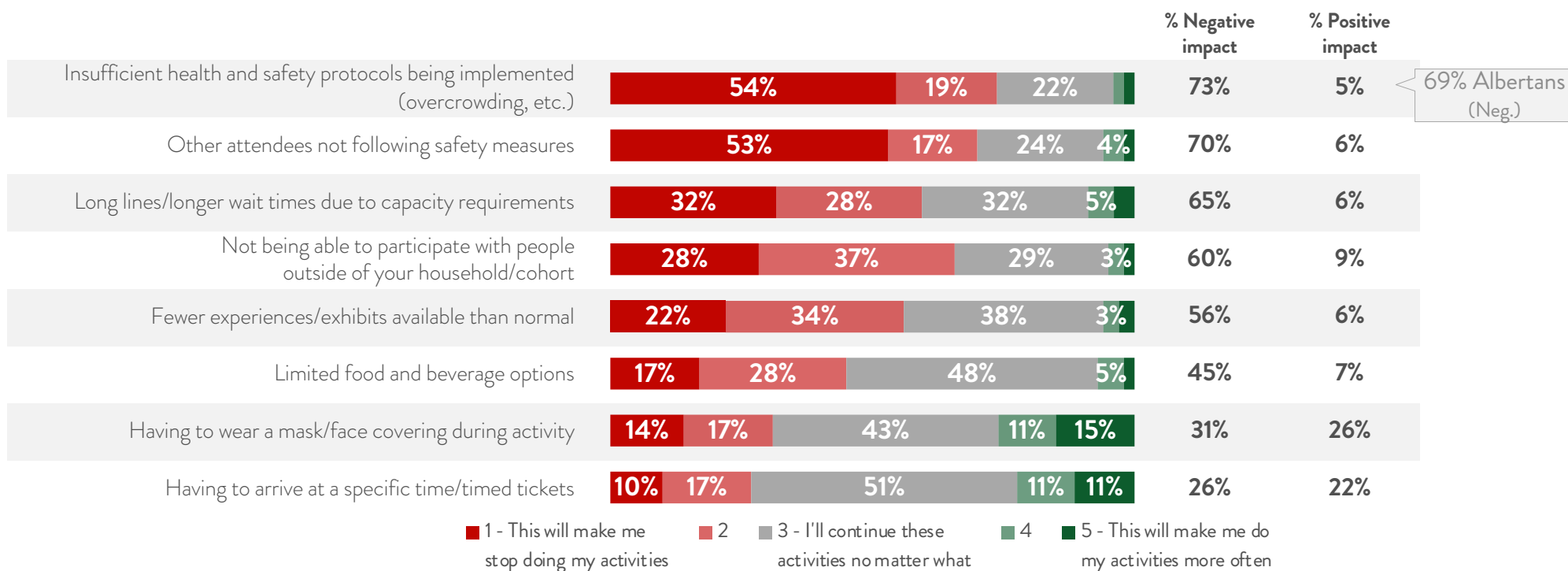
Frustrated (59%), exhausted (49%), stressed (47%), annoyed (47%), worried (41%), and isolated (41%)

Risk Avoiders

Worried (57%), frustrated (43%), stressed (43%), isolated (38%), and sad (35%)

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?
Base: Calgary (n=505)

Health and safety protocols are top priority for Calgarians to participate

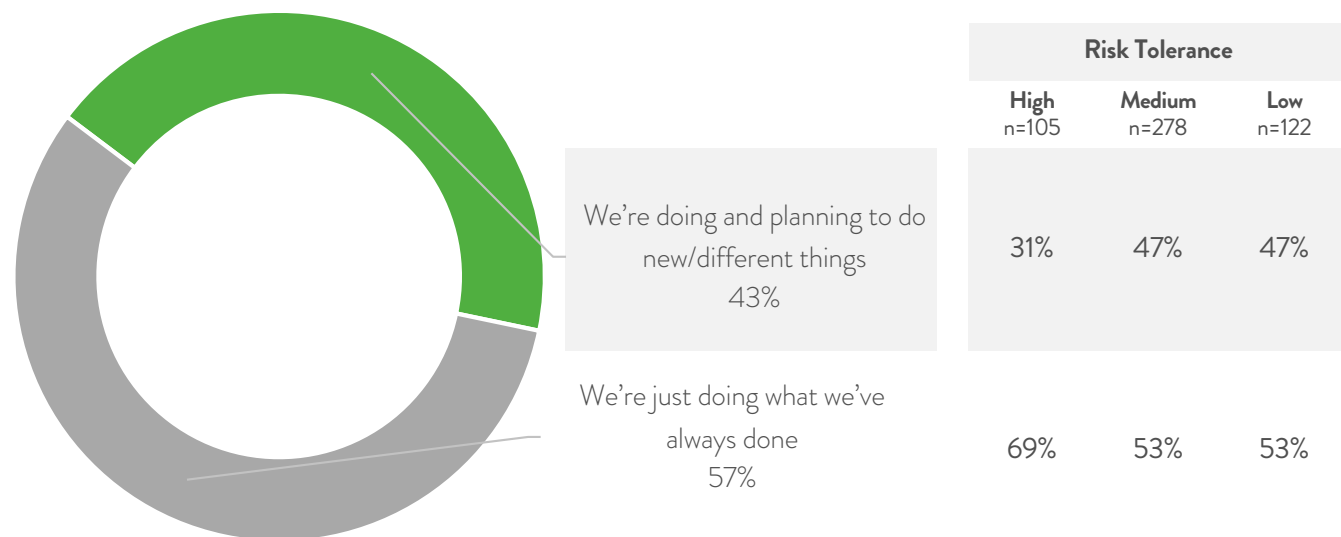


Over the past few months, organizations have been navigating safety measures that can impact guest experiences. What impact, if any, do the following have on your willingness to participate in experiences (assuming restrictions allow)? Base: Calgary (n=505)

Assessing activities

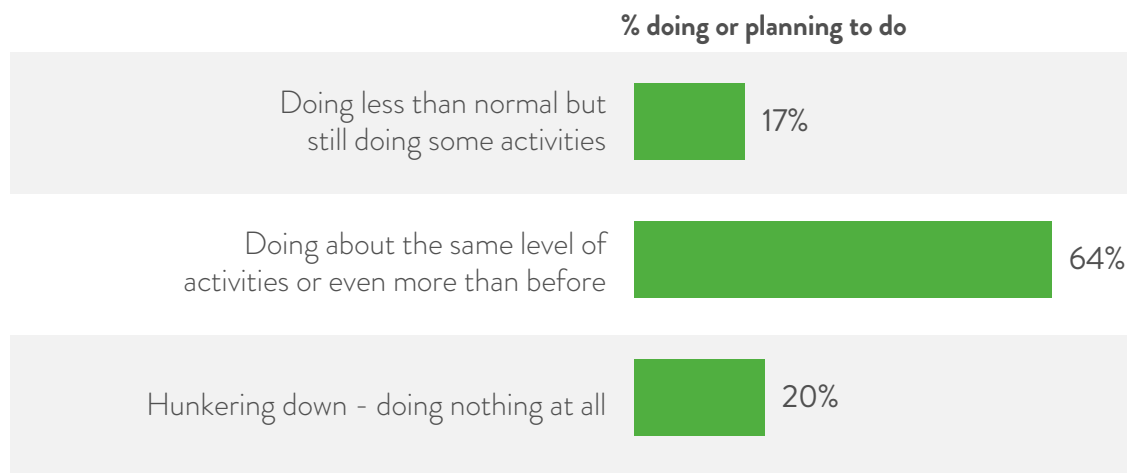


With restrictions and higher caseloads notable proportions are adding other activities to substitute what they cannot do.



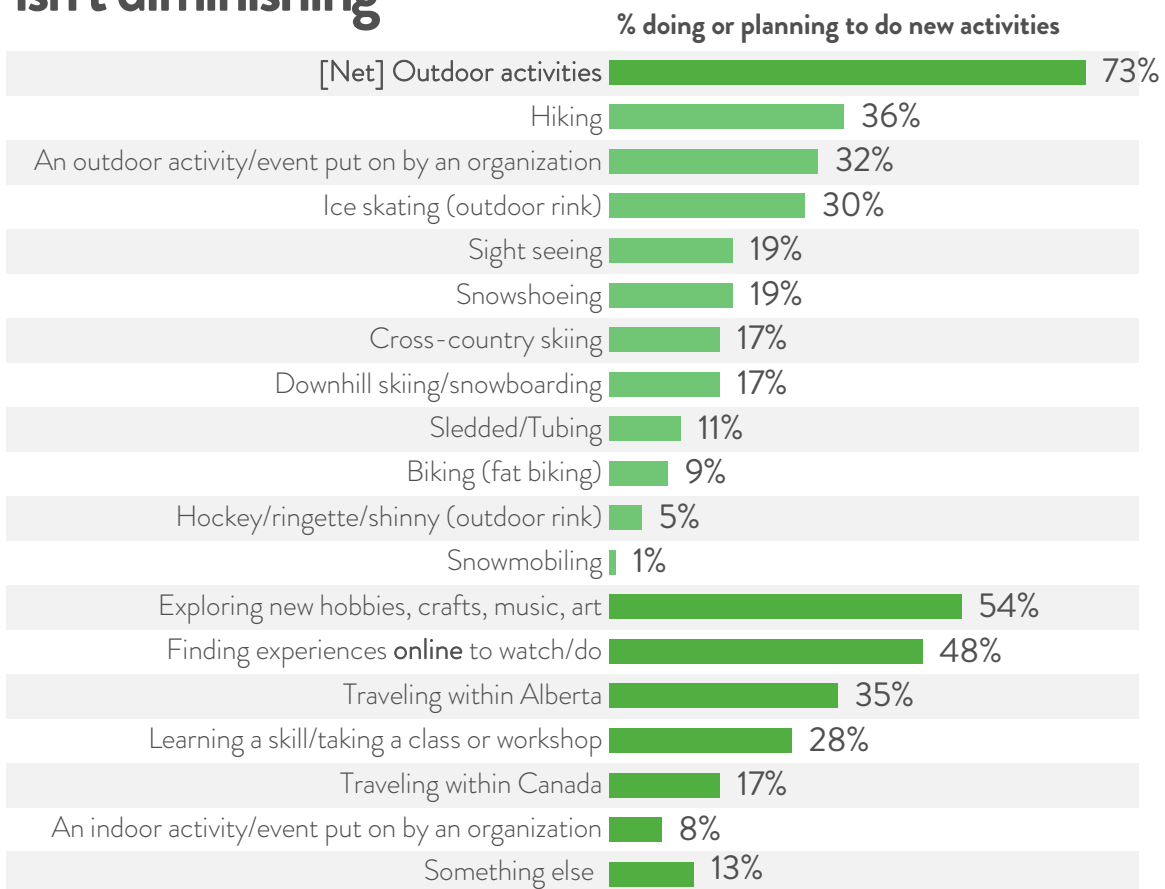
With the pandemic, we're interested in understanding new and different things that you might do this time of year. By this we mean new activities, new hobbies, something you used to do as a kid, etc. Thinking ahead to the next few months, are you...? Base: Calgary (n=505)

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



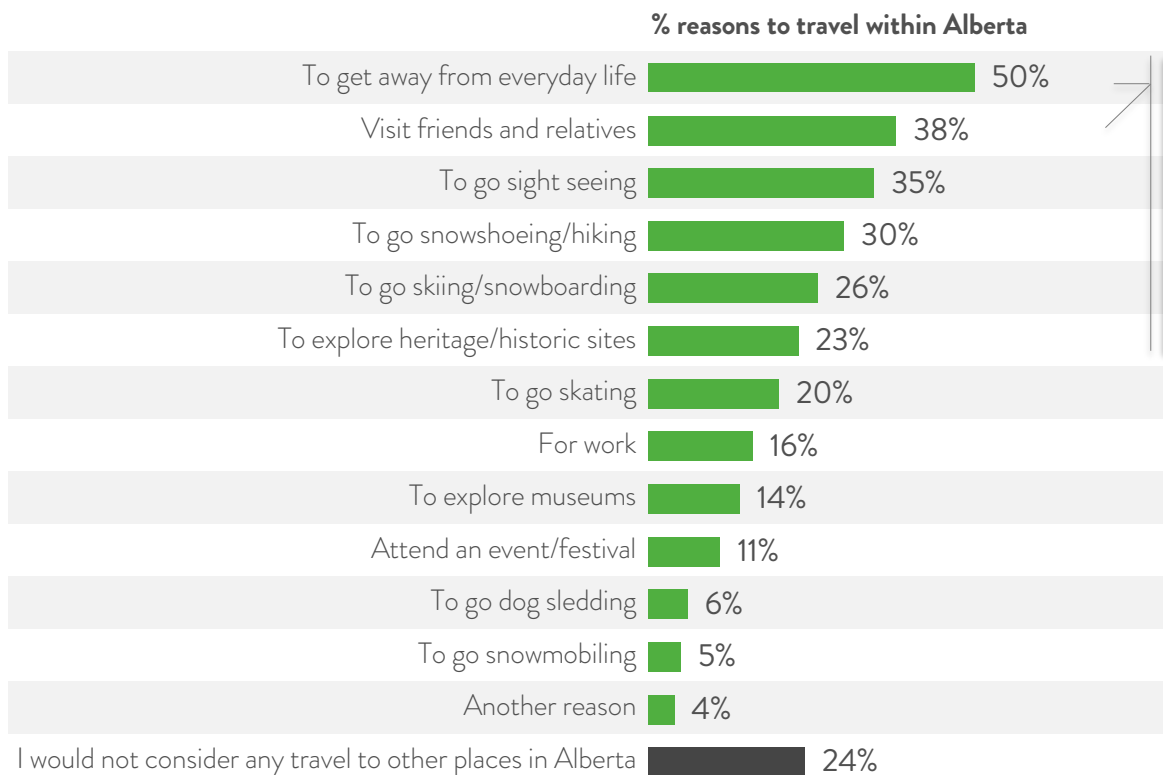
You mentioned doing what you've always done. Are you...?
Base: Doing what they've always done (n=286)

There is continued interest for outdoor experiences, but appetite for online isn't diminishing



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=219)

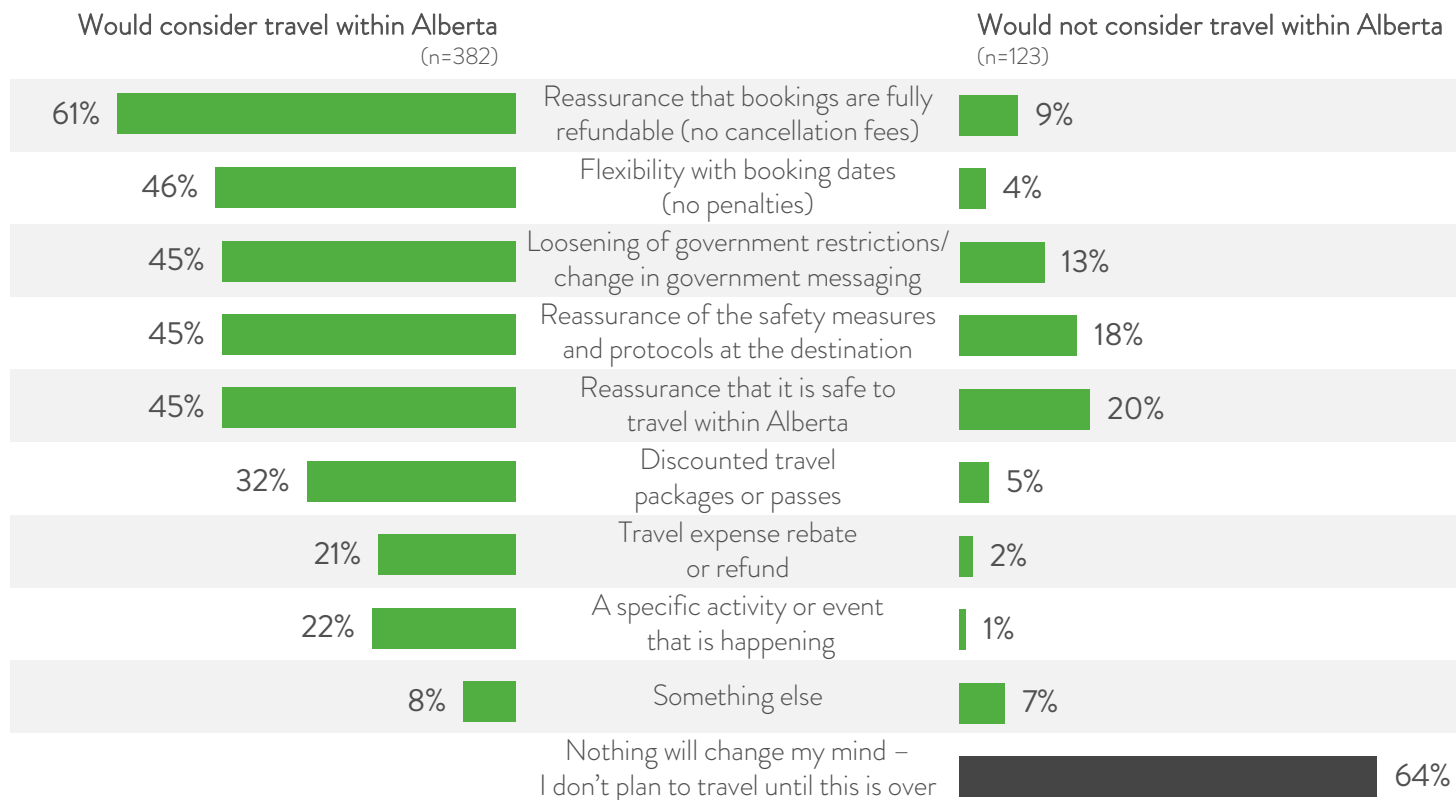
Main motivators to explore the province focus on escapism and fulfilling social motivations



Calgarians, like 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: Calgary (n=505)

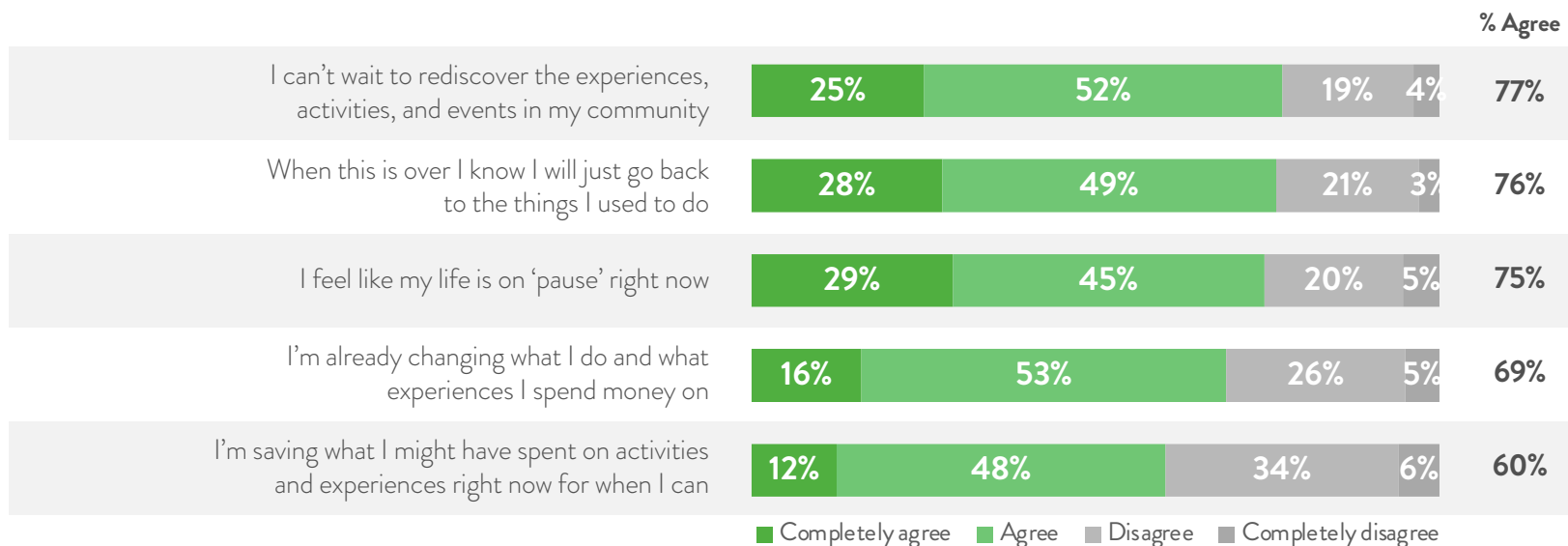
What do Calgarians need to decide to travel within the province?



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: Calgary sample (n varies)

Calgarians largely feel their life is on ‘pause’ and are waiting to rediscover their usual activities. With restrictions in place, they are finding things to do while they wait.

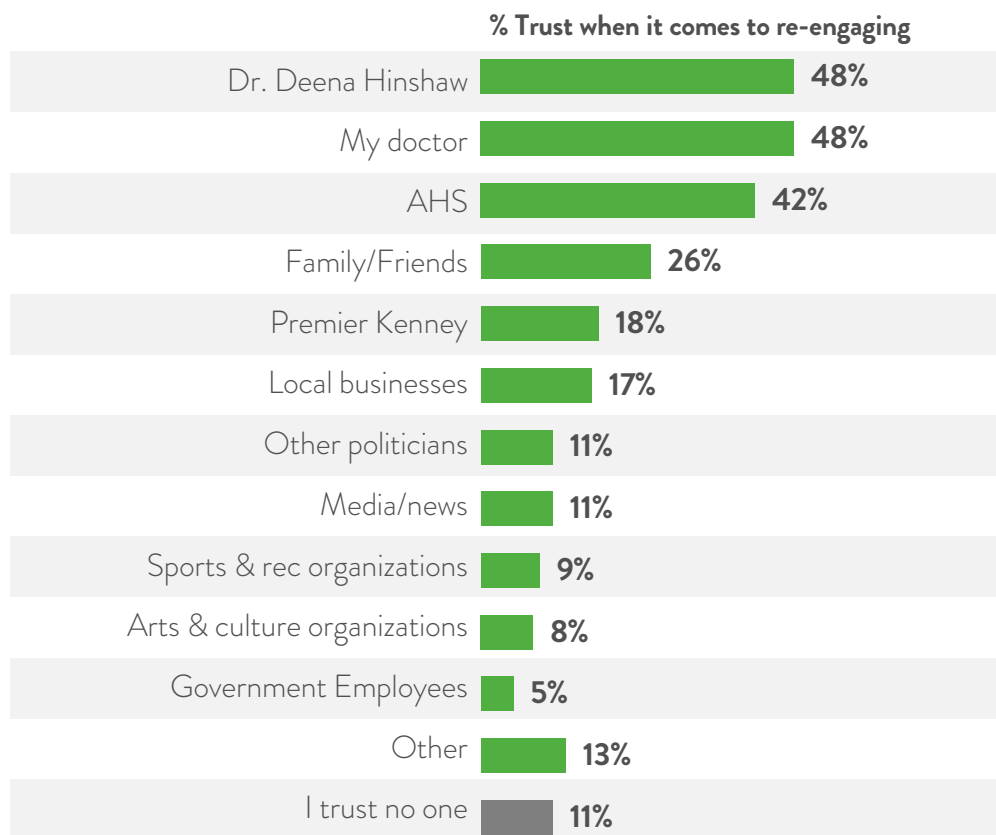


Below are a few things people might say about the current situation and how they spend their time and money – please tell us if you agree or disagree.
Base: Calgary (n=505)

How to reach audiences?

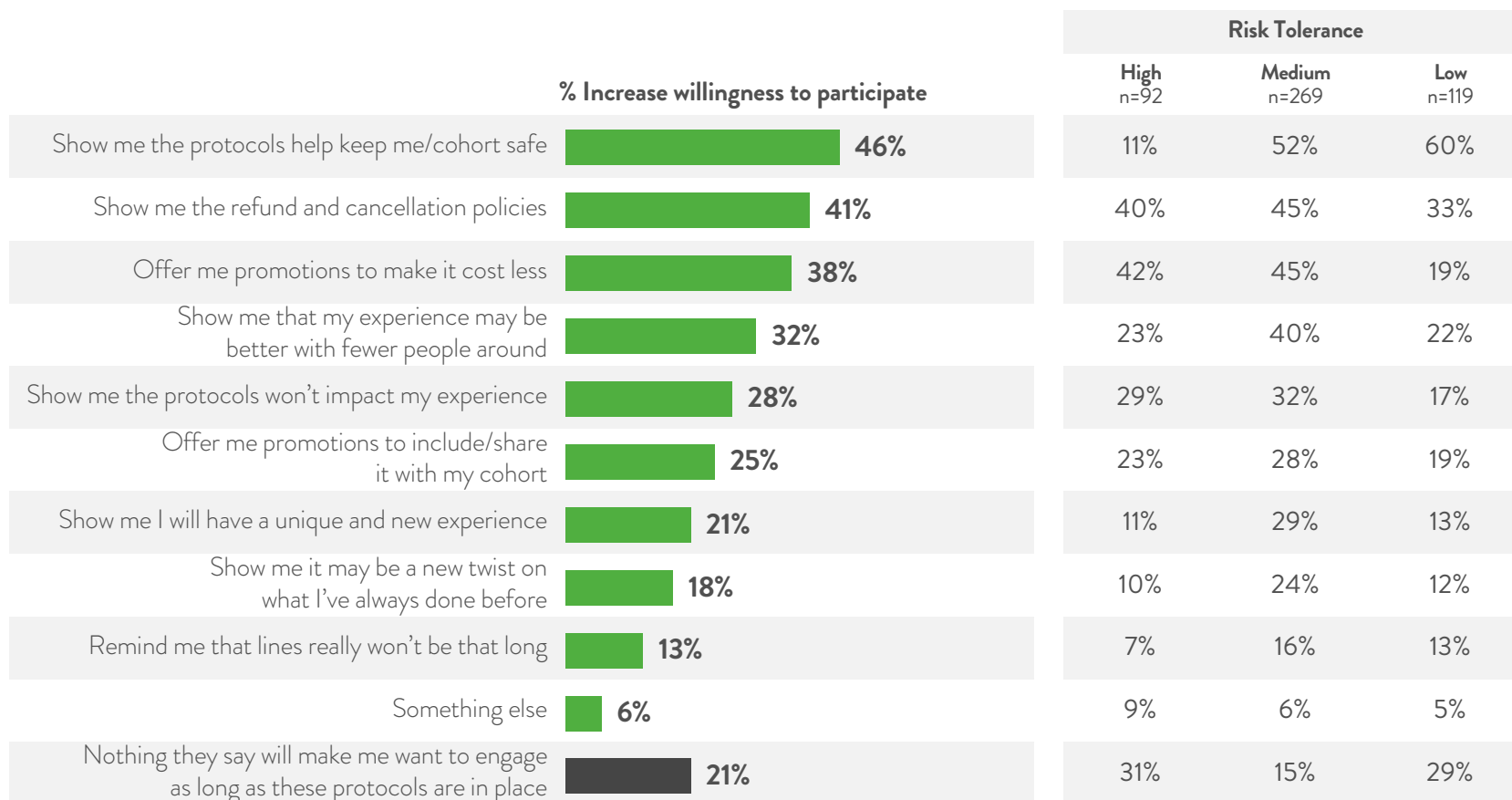


Similar to the rest of the province, Calgarians trust medical experts most when it comes to re-engaging



Who do you trust when it comes to re-engaging with experiences and activities? Please select all that apply.
Base: Calgary (n=505)

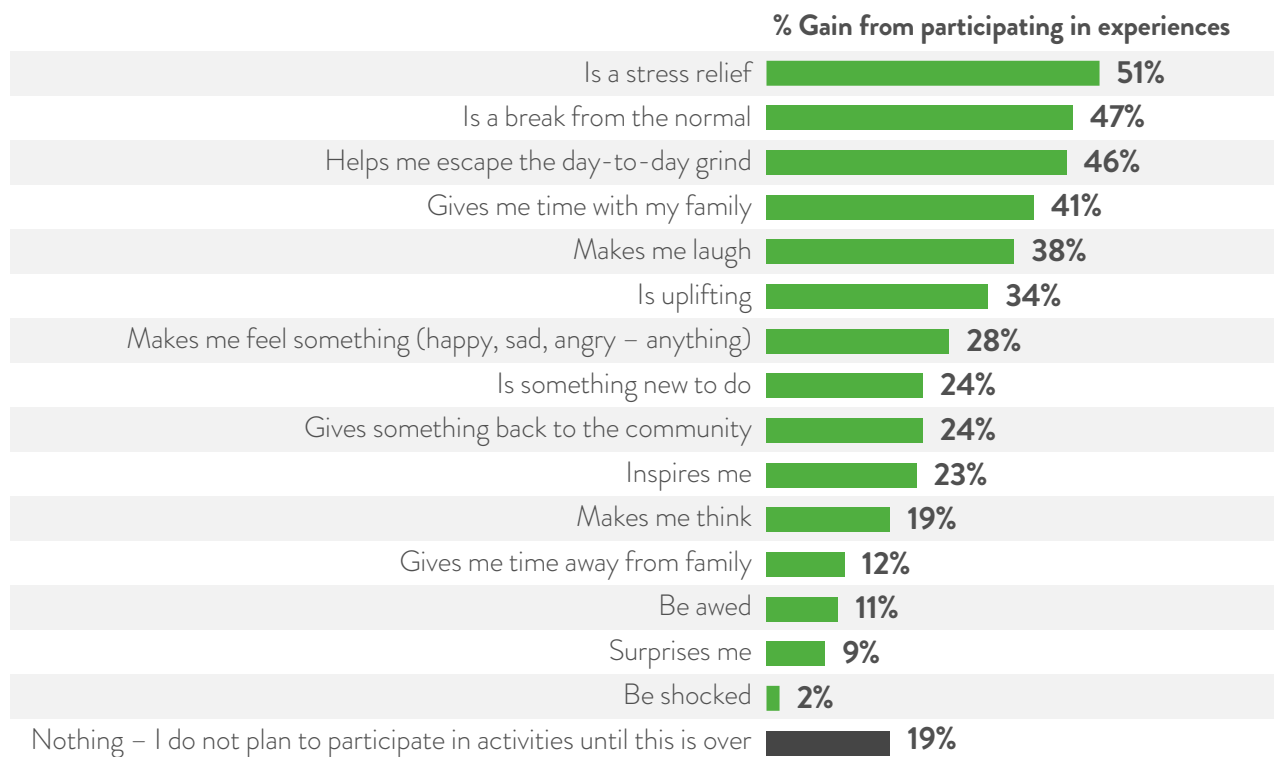
Audiences will need a different message



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.

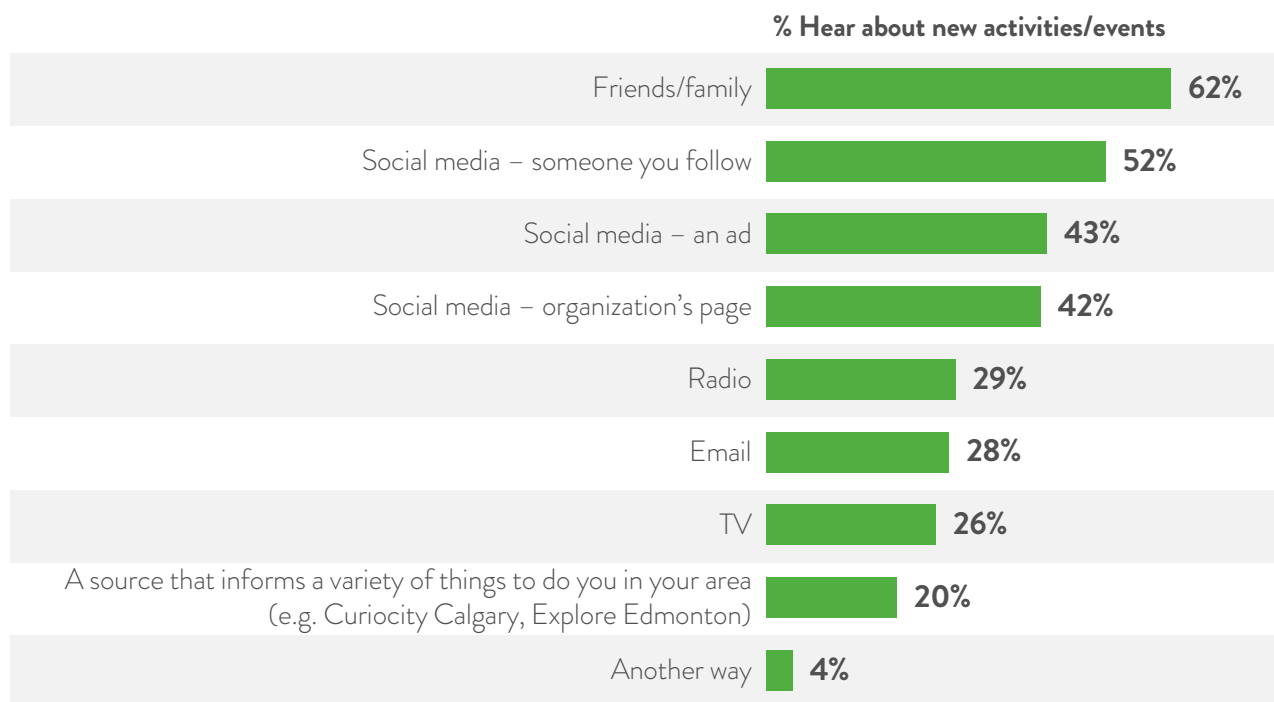
Base: Any rating of negative impact from any safety measure (n=480)

Stress relief, escapism and connection are key benefits Calgarians seek during restrictions



We know this is a tough time for everyone right now. Assuming restrictions allow and an organization can assure you that they are following protocols, what do you want to get out of participating in any activity during times like these? Please select all that apply. *Base: Calgary (n=505)*

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



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: Calgary (n=505)

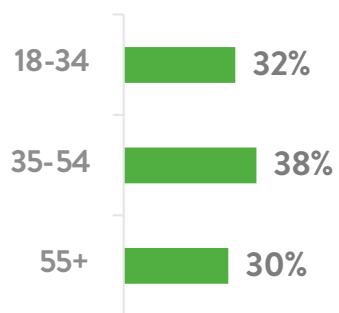
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Respondent Profile

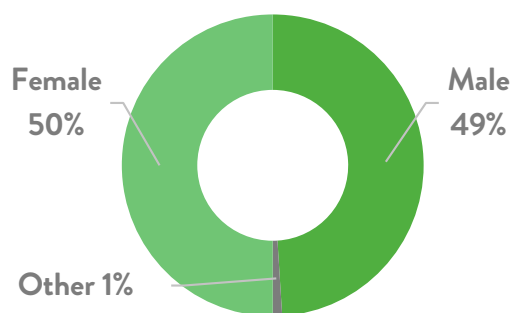


Who We Heard From (Calgary)

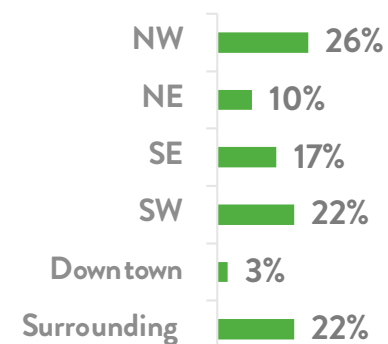
Age



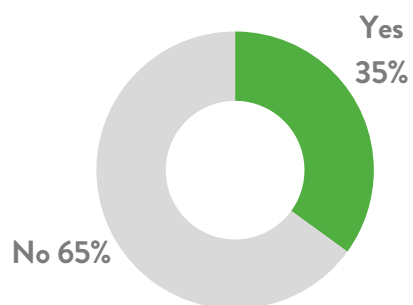
Gender



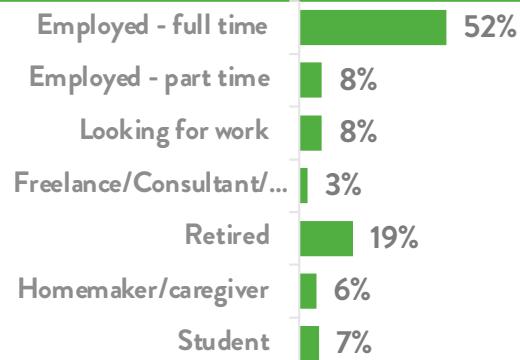
Location



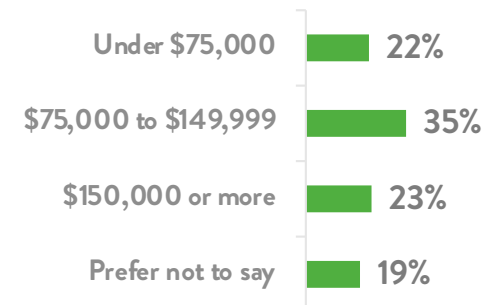
Children in the Household



Employment

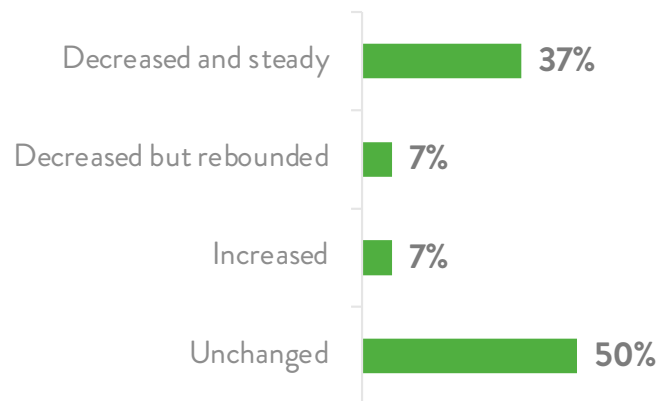


Household Income

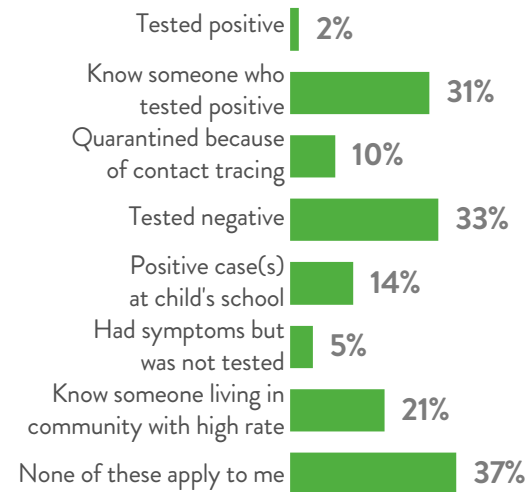


Who We Heard From (Calgary)

Income Changes (COVID)



Connection to COVID



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Understanding people. It's what we do.