

A photograph of the Edmonton skyline in winter, featuring the Peace Bridge and a snow-covered hill in the foreground. The sky is overcast and grey.

The NEW Experience Economy:

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

Phase 4 Results: Edmonton
January 2021

Stone —
Olafson

Table of contents

- 3 Background & Purpose
- 4 How to use this report
- 5 How is Edmonton different?
- 6 Comfort levels, risk tolerance, and consumer mindset
- 9 Impact of protocols and restrictions
- 14 Assessing activities
- 21 How to reach audiences?
- 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 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 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 502 Edmonton-specific surveys were collected (329 base surveys, 173 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:

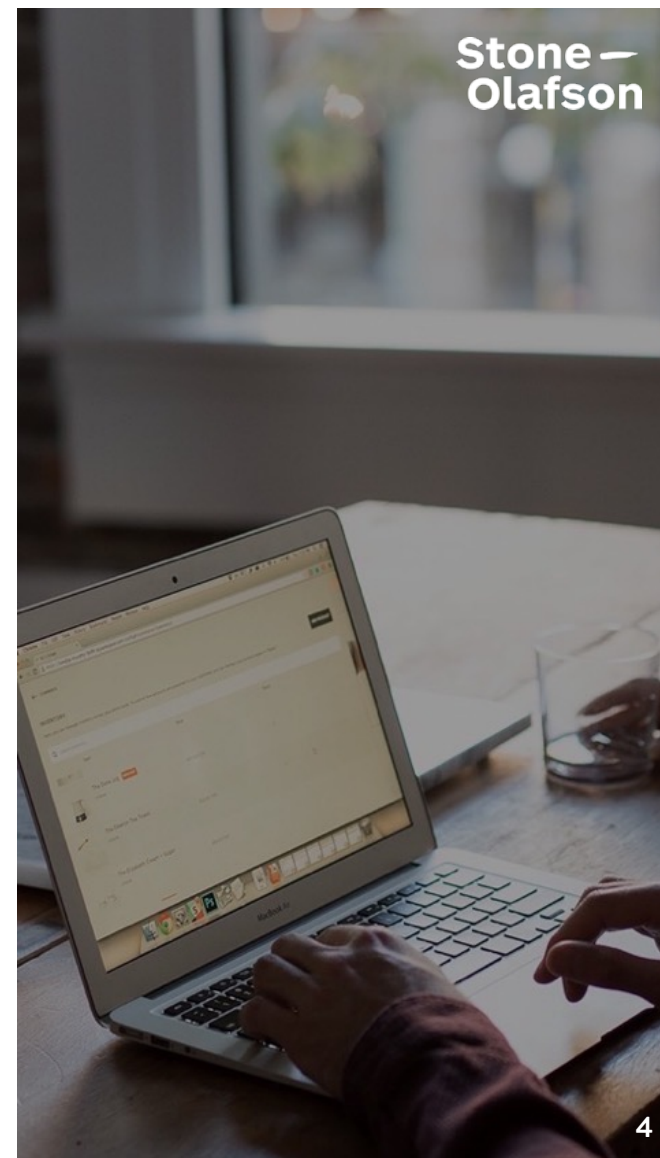
www.stone-olafson.com/insights

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 Edmonton?

1.

Edmonton sees the largest drop in comfort

As case numbers rise across the province, Edmonton sees the largest numbers which drastically impacts comfort levels. But their desire to re-engage has only shifted slightly.

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

Similar to Albertans, Edmontonians feel like their life is on pause right now. While current restrictions are in place, they are discovering new activities – more so than other Albertans. They are more likely to be engaging in new hobbies, crafts, art and music for example.

As restrictions ease, audiences are likely to be more comfortable engaging in their usual activities, but they will 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 Edmonton are wary, frustrated, exhausted, and concerned about safety – more than Albertans.

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.

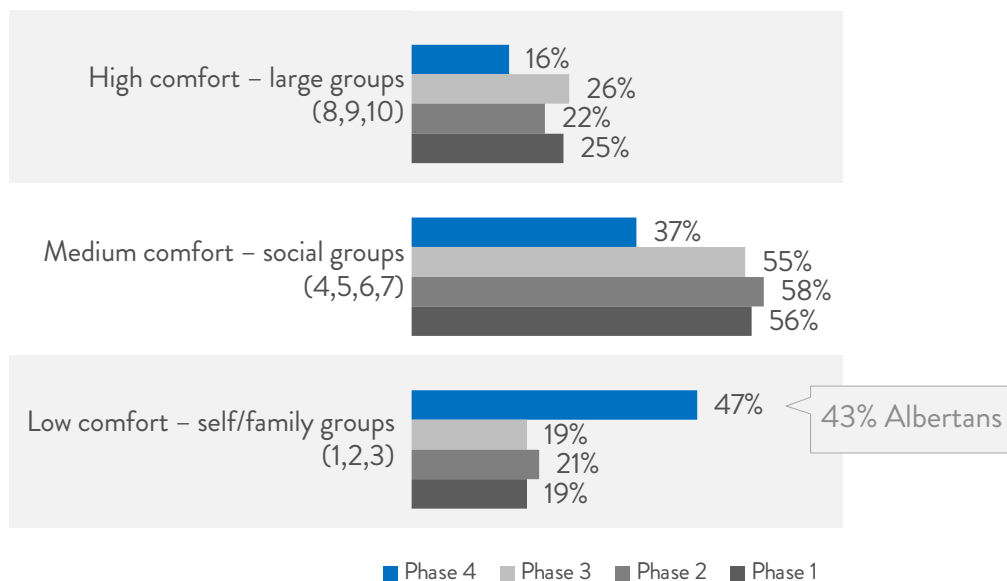
Organizations are likely going to need a multi-layered media strategy that can reach influencers who can help propel the message. Not pure social media, but messages that are repeatable to others.



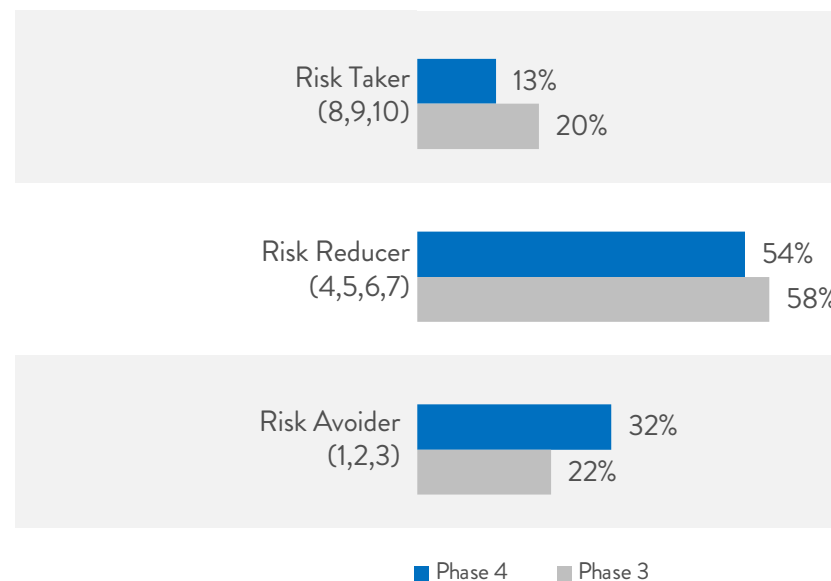
Comfort levels, risk tolerance, and consumer mindset

With the rise of cases highest in Edmonton, comfort levels remain lower than the province and have the lowest overall risk tolerance average

Comfort Level

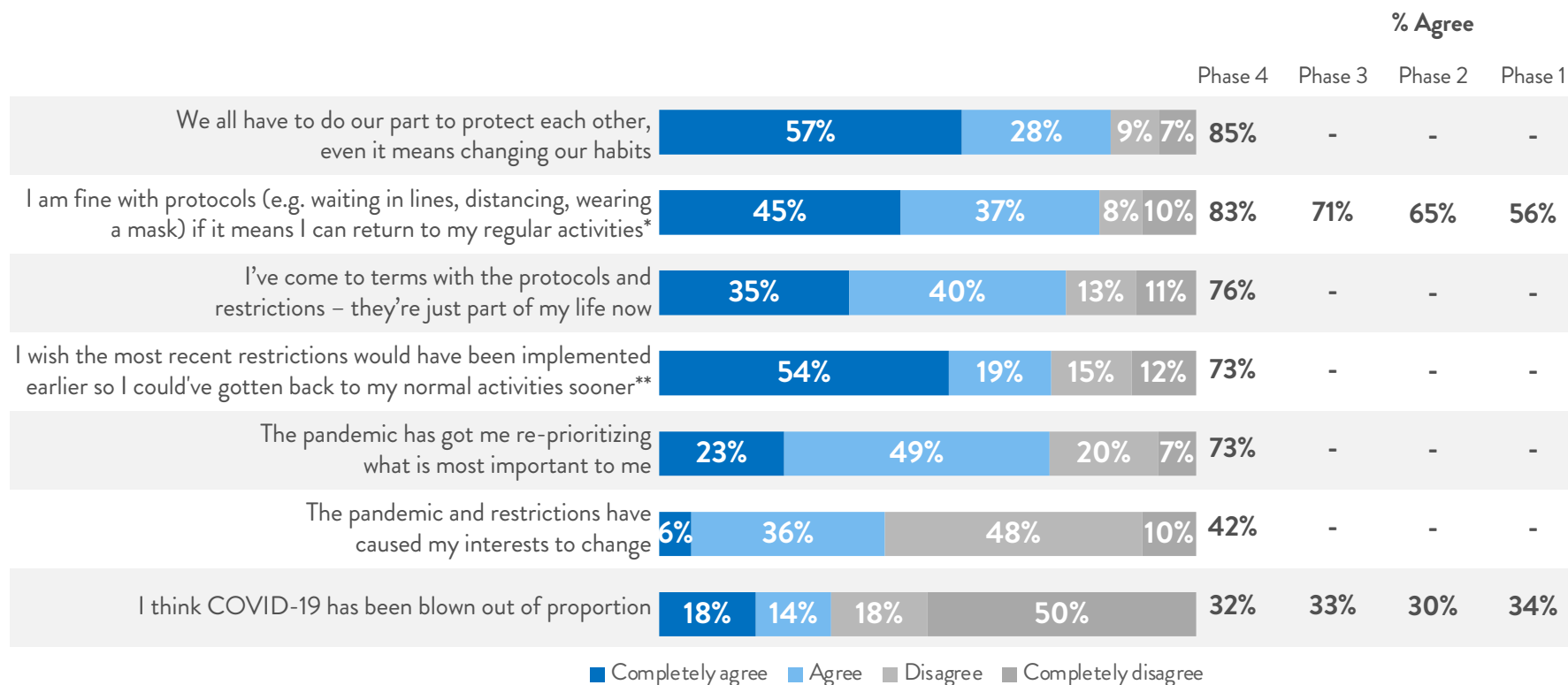


Risk Tolerance



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: Edmonton (n=502)

Edmontonians are accepting the protocols and restrictions more so than other parts of Alberta



70% Albertans

*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: Edmonton (n=502)

Impact of protocols and restrictions

IT'S NOT GOOD
IT'S JUST SEE YOU LATE

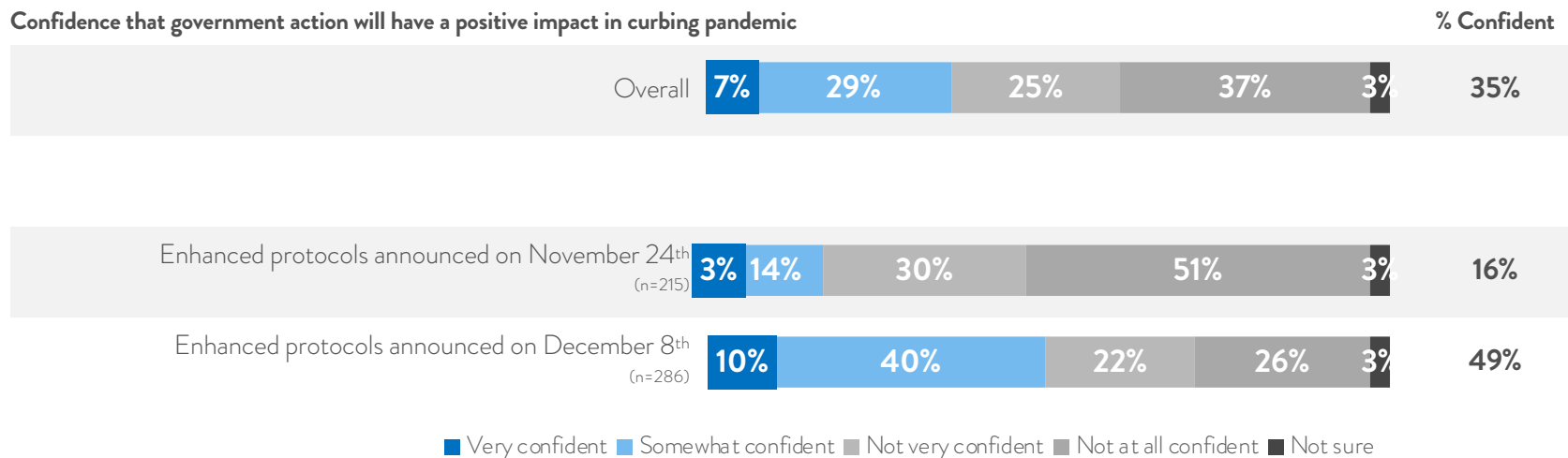
VISIT METROCINEMA.ORG FOR
VIRTUAL SCREENINGS

8716 109

87 AVENUE

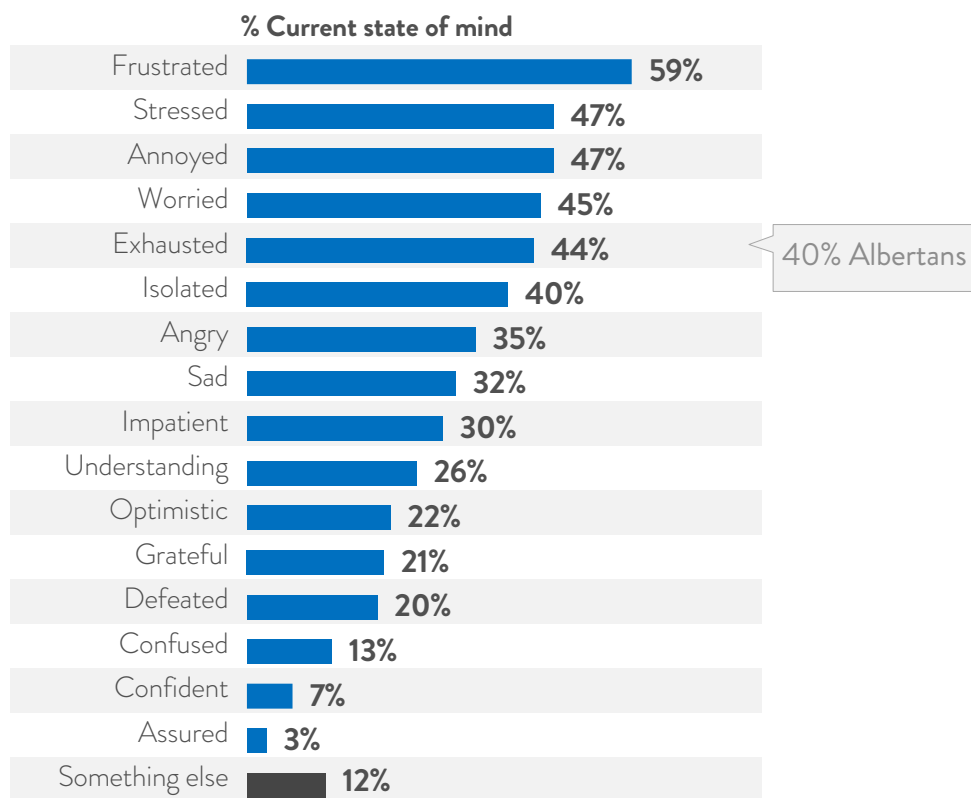


Confidence increases across the province with enhanced government protocols put in place to curb the pandemic, yet it lacks intensity



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: Edmonton (n=501)*

Frustration and annoyance emerge as the dominant emotion and Edmontonians are feeling slightly exhausted



Risk Takers

Annoyed (72%), frustrated (66%), angry (58%), impatient (50%), and stressed (45%)

Risk Reducers

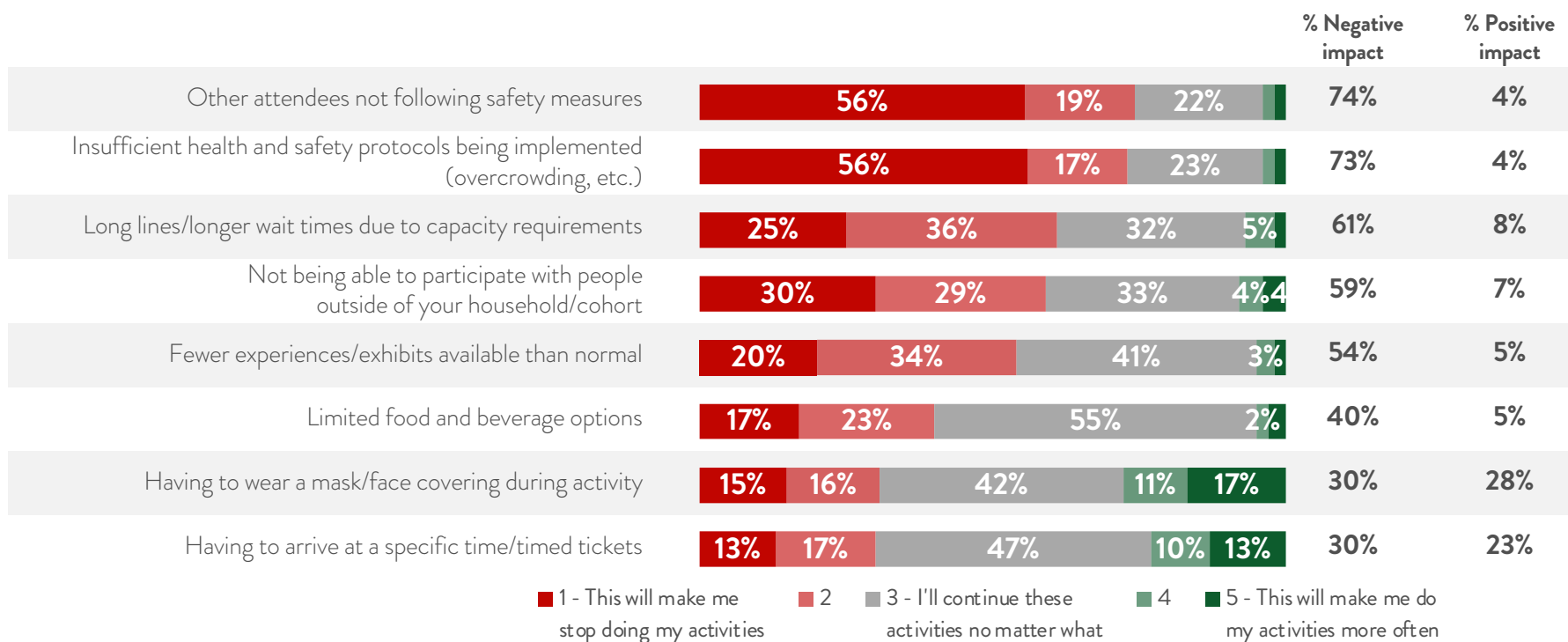
Frustrated (57%), exhausted (48%), annoyed (45%), stressed (43%), and worried (42%)

Risk Avoiders

Worried (63%), frustrated (56%), stressed (55%), exhausted (42%), and isolated (41%), but are also more likely to be feeling grateful (30%)

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: Edmonton (n=502)

Health and safety protocols are top priority for Edmontonians to participate

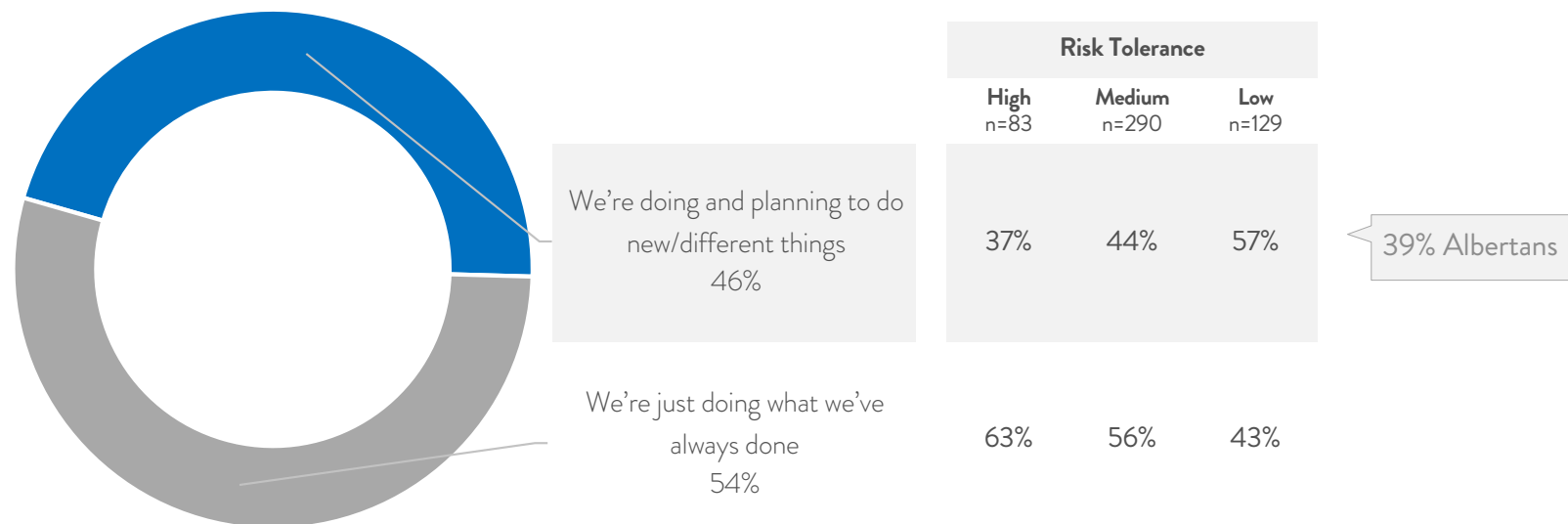


Over the past few months, organizations have been navigating safety measures that can impact guest experiences. What impact, if any, do the following have on your willingness to participate in experiences (assuming restrictions allow)? *Base: Edmonton (n=502)*

Assessing activities

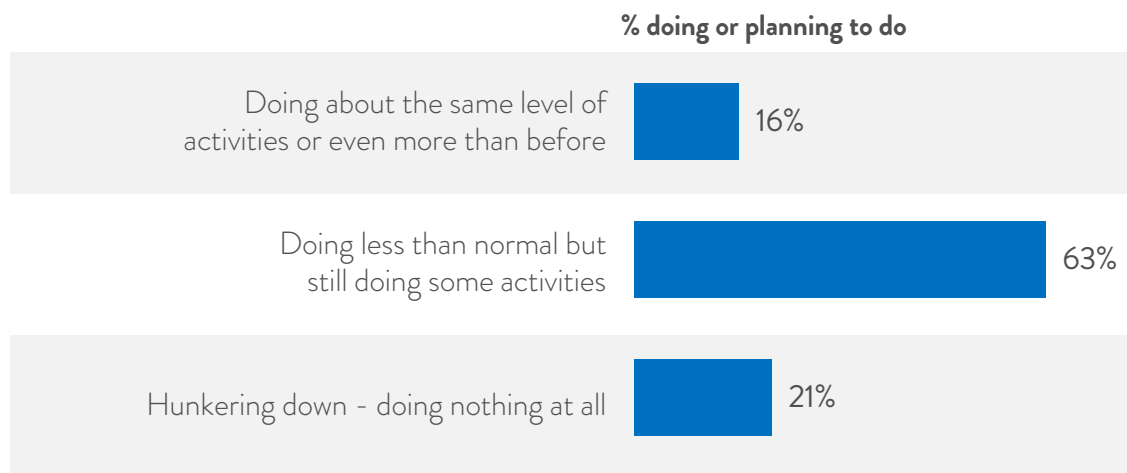


With restrictions and higher caseloads, Edmontonians are adding other activities to substitute what they cannot do – more than the rest of the province



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: Edmonton (n=502)

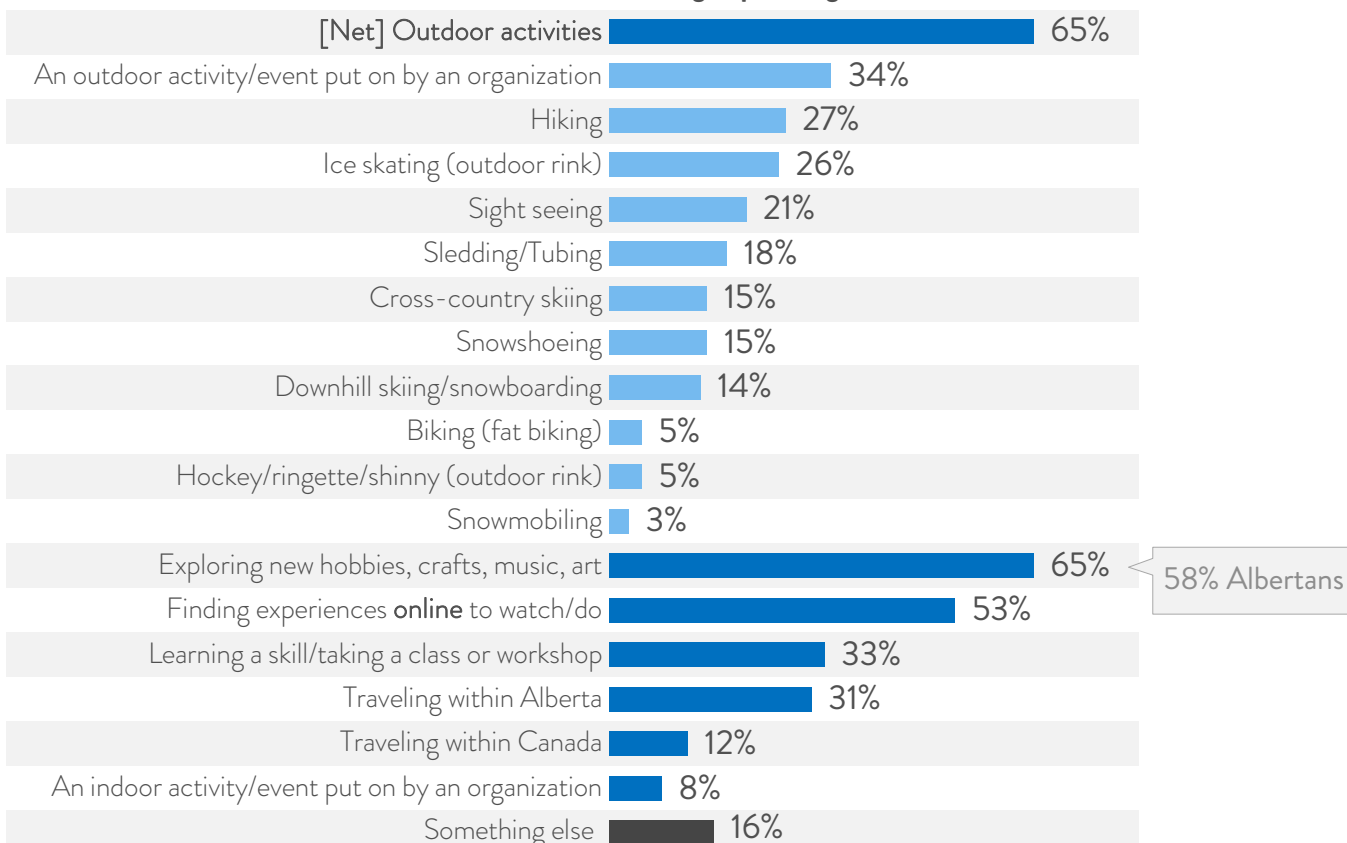
Only a small proportion of those who are doing what they've always done are limiting their experiences to nothing



You mentioned doing what you've always done. Are you...?
Base: Doing what they've always done (n=271)

There is continued interest for outdoor experiences, they are also showing a greater appetite for exploring new hobbies, crafts, music and art

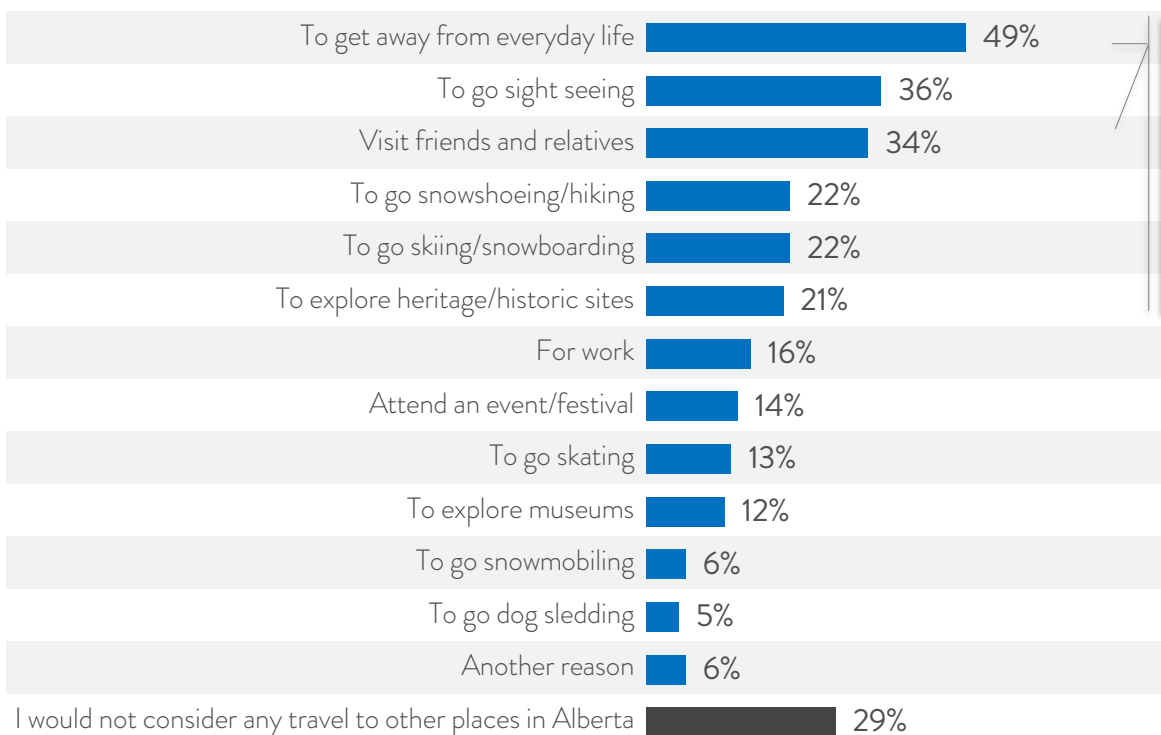
% doing or planning to do new activities



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=231)

Main motivators to explore the province focus on escapism and fulfilling social motivations, as well as sight seeing

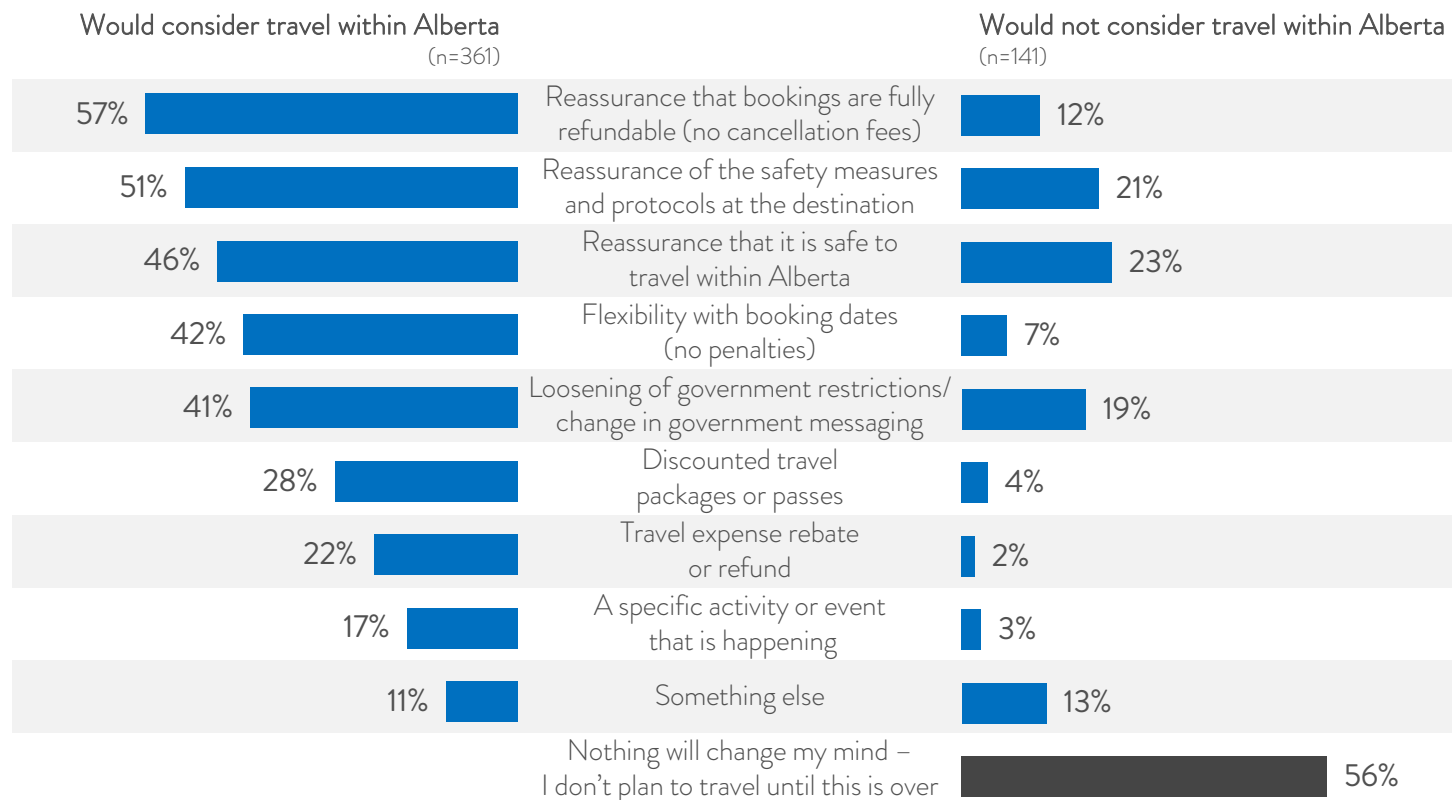
% reasons to travel within Alberta



Edmontonians, like Albertans, have varying degrees of interest in outdoor activities, but they share 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: Edmonton (n=502)

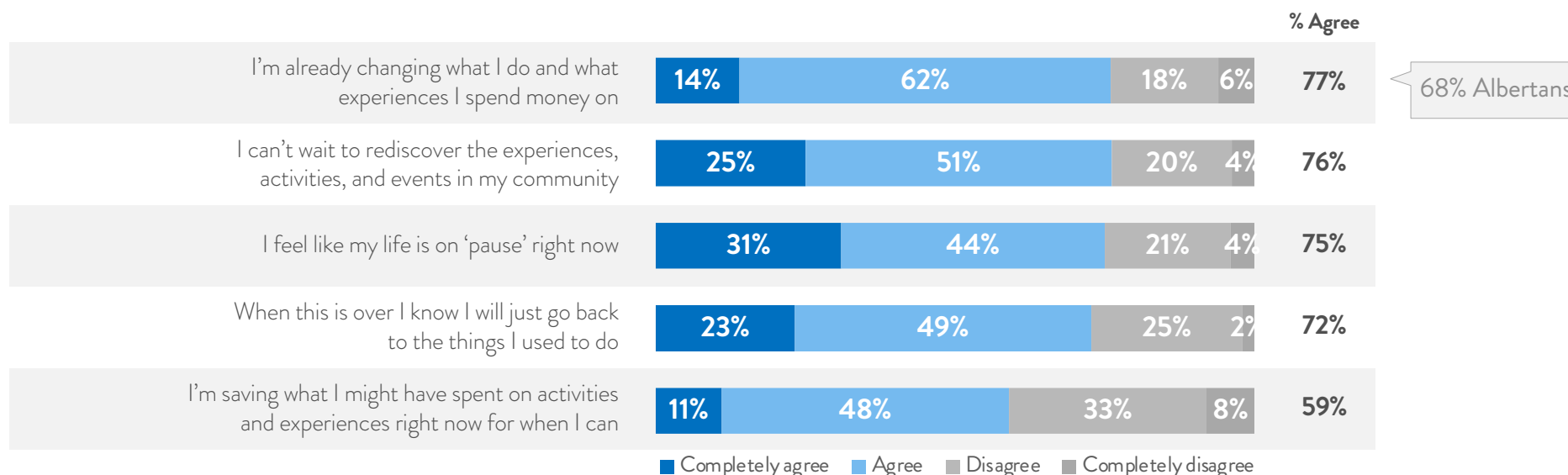
More than other parts of the province, Edmontonians need to be reassured of the safety measures – flexibility is also important



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: Edmonton sample (n varies)

While they largely feel their life is on ‘pause’ and are waiting to rediscover their usual activities, Edmontonians are changing and adding things to do while they wait out restrictions.



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: Edmonton (n=502)

How to reach audiences?

Edmonton

Wear a Mask or Face Covering.

Keep your community safe

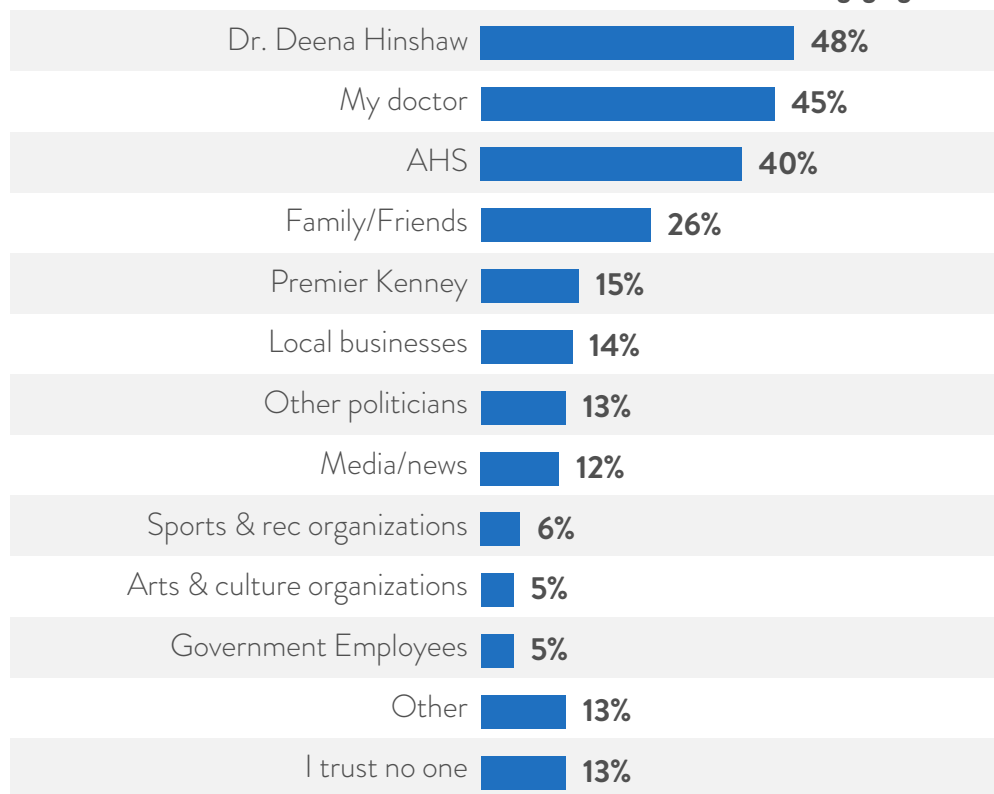
Mask or face covering is mandatory in all indoor public spaces and public vehicles in Edmonton. Some exemptions apply

- + Avoid touching your eyes, mouth and nose
- + Practice proper hand hygiene
- + Cough or sneeze into your elbow, or into a tissue
- + Practice physical distancing
- + Stay home if you feel sick

#WearAMaskYEG

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

% Trust 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: Edmonton (n=502)

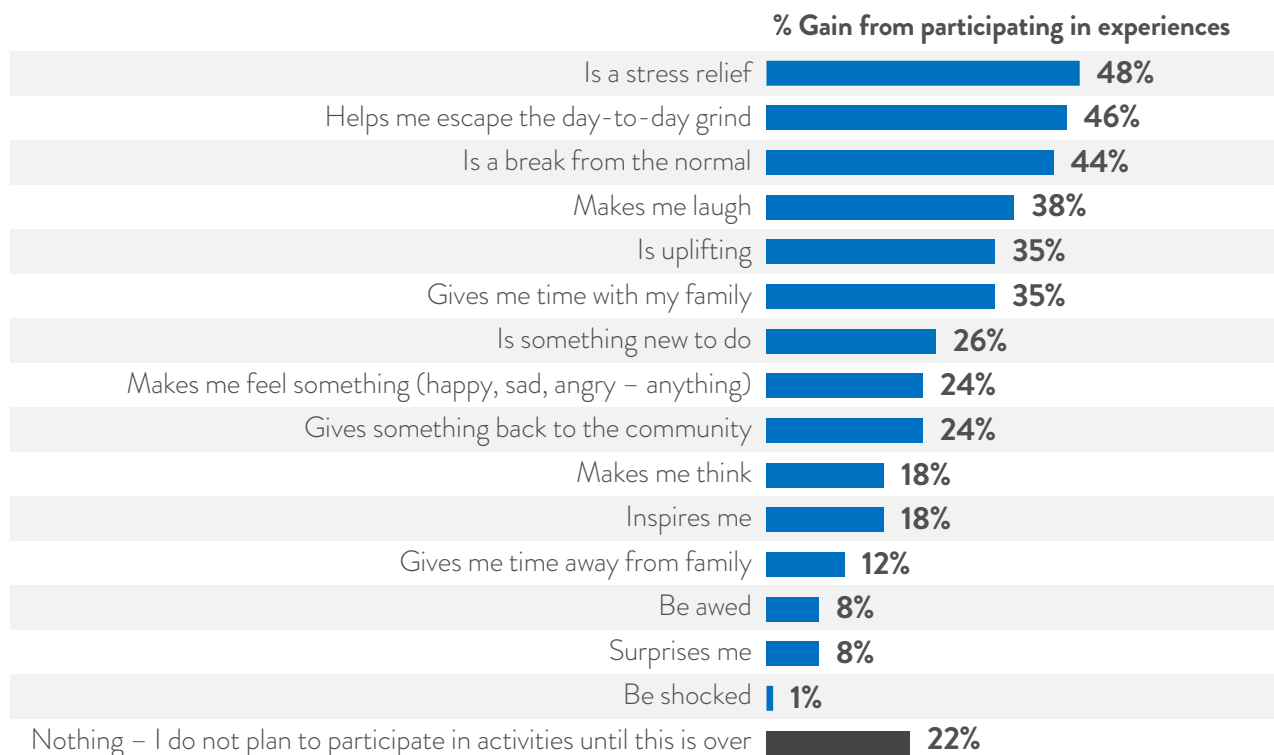
Audiences will need a different message. Not surprisingly safety and flexibility are at the top of the list.



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=481)

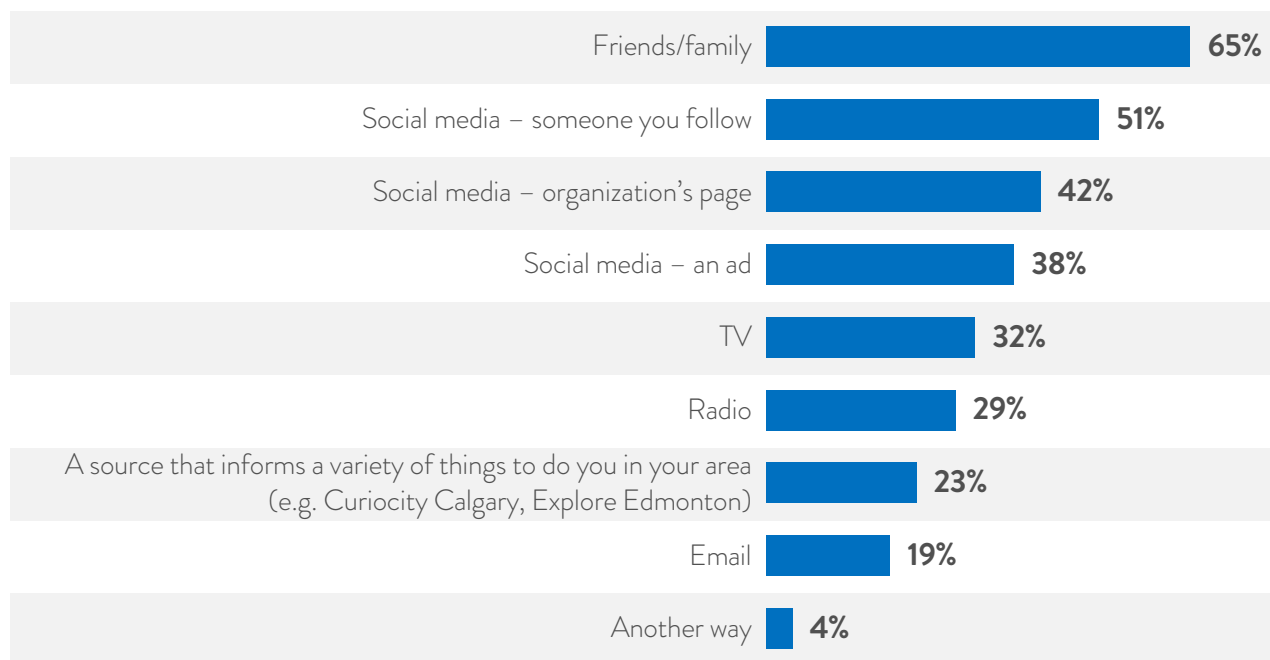
Stress relief, escapism and connection are key benefits Edmontonians seek during restrictions



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: Edmonton (n=502)*

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

% Hear about new activities/events



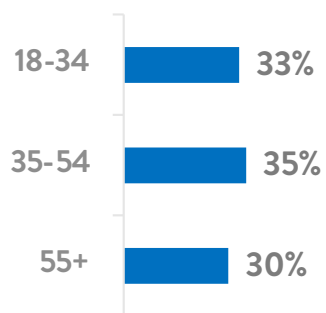
Now these organizations will have to reach you in new ways, especially if it’s an organization that’s new to you. How do you typically hear about new activities/events that you’ve never done before? *Base: Edmonton (n=502)*

Respondent Profile

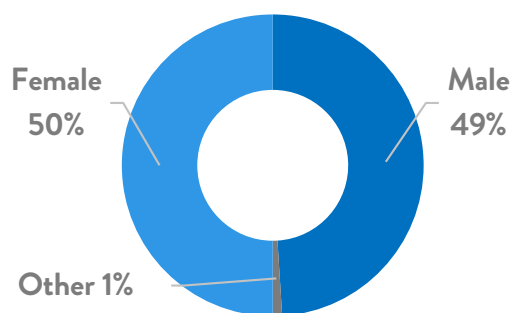
A photograph of a large, modern building with a yellow facade and curved roof sections, set in a snowy winter environment. A person in a teal jacket and black hat is walking in the foreground. Two white SUVs are parked in the distance.

Who We Heard From (Edmonton)

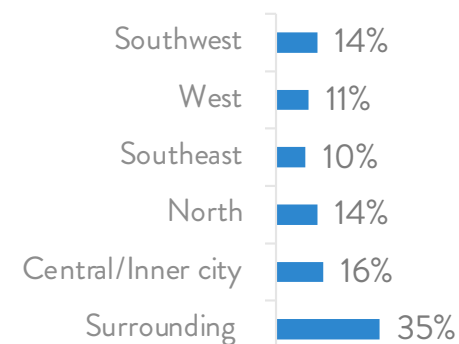
Age



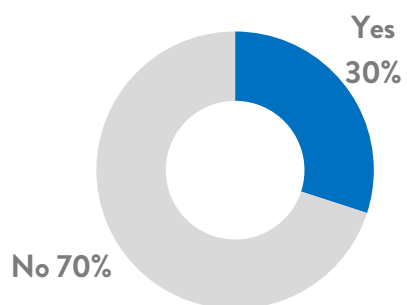
Gender



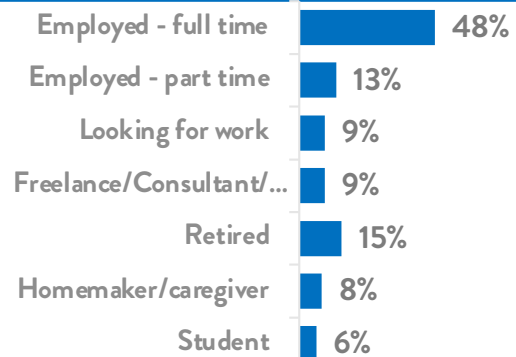
Location



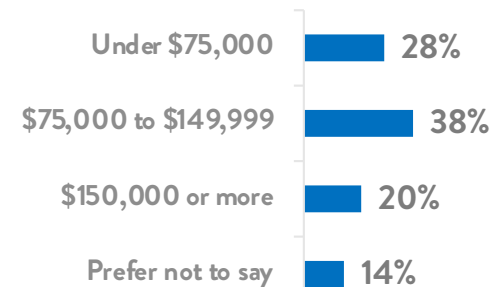
Children in the Household



Employment

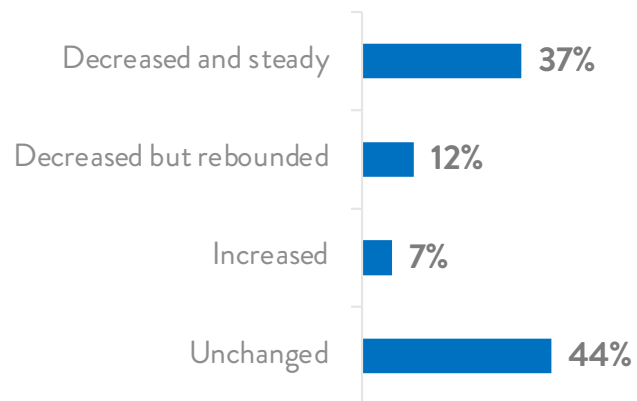


Household Income

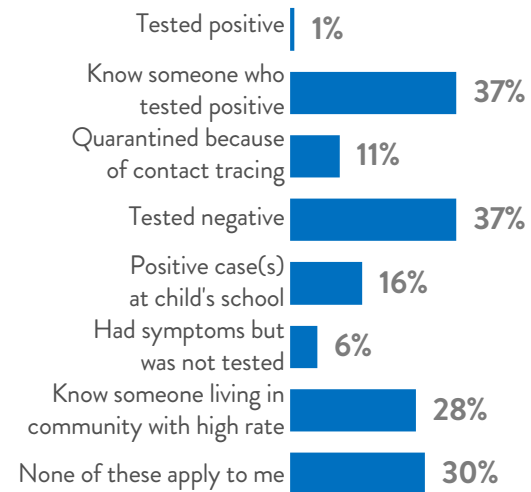


Who We Heard From (Edmonton)

Income Changes (COVID)



Connection to COVID



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Understanding people. It's what we do.