

The NEW Experience Economy:

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

Phase 6 Results: Calgary

July 2021

Table of contents

- 3 Background & Purpose
- 4 How to use this report
- 5 How is Calgary different?
- 6 Comfort levels, risk tolerance, and consumer mindset
- 9 How do Calgarians feel about re-opening?
- 15 Consideration for engagement and barriers to address
- 20 Spending habits and messaging opportunities
- 24 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.

Now more than a year into the pandemic, restrictions are shifting again along with the availability of experiences for Calgarians. The sixth round of research focuses on the following:

- Monitoring key attitudes, mindset, measures of comfort and risk;
- Explore consideration for activities and events as restrictions lift;
- Identify barriers for engagement and inform communication strategies; and,
- Understand how attitudes towards vaccines might impact behaviours.



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 489 Calgary-specific surveys were collected (350 from main sample, 139 boost) from June 4 – June 21, 2021.

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:

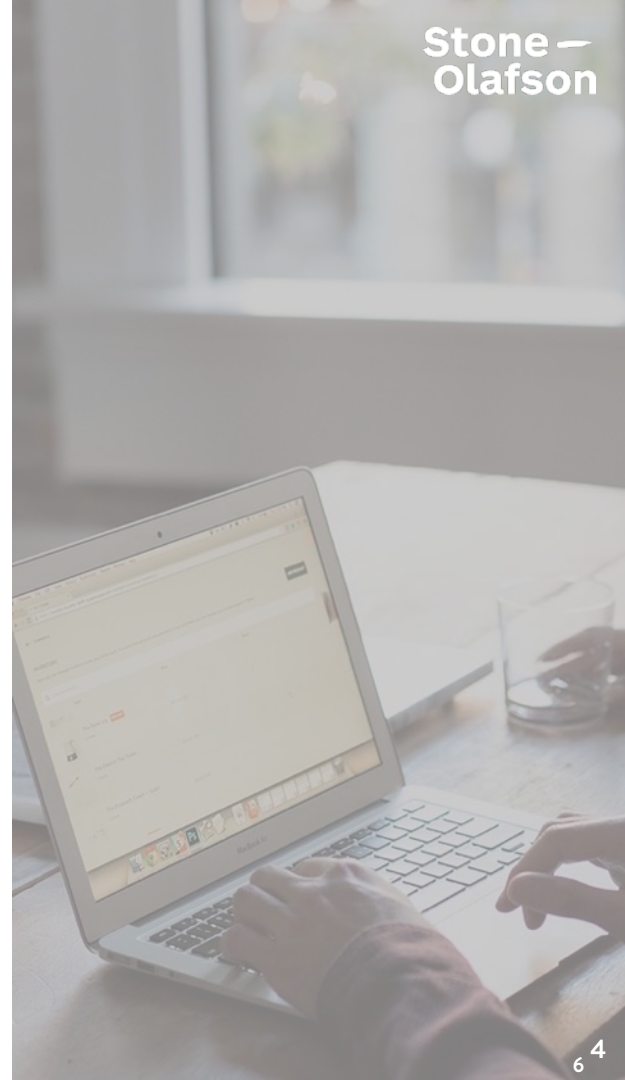
www.stone-olafson.com/insights

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.



Calgarians continue to closely mimic their fellow Albertans in attitudes and perceptions.

1.

Comfort and risk are shifting in a positive direction

As we've seen through the last year and a half, comfort has developed into a very predictable pattern that follows case numbers and now vaccine rates. The same trend for city centres holds true, where Calgarians have a greater cautious optimism.

A reminder to organizations in Calgary that understanding basic comfort and risk levels allows you to communicate in ways to encourage re-engagement.

2.

Calgarians will return at their own pace

While comfort and risk make progress, Calgarians have a greater pent-up interest than pent-up demand. They show excitement to get back to activities but have a “wait and see” mentality.

Organizations should keep in mind that public sentiment is a more useful barometer over government announcements. Some audiences will want similar programming that was offered during the pandemic while others are ready to return in-person.

3.

Spending habits are markedly different

The shift in spending habits is slightly more prominent in Calgary. And they continue to look for flexibility - in terms of payment options, participation options, etc.

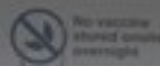
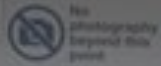
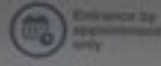
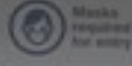
As such, expectations from organizations should be muted with respect to how Calgarians will spend, at least in the short term. Providing flexibility allows for Calgarians to suss out how they want to direct their time and spending.



Immunization Clinic

CALGARY TELUS CONVENTION CENTRE - NORTH BUILDING

+11



Perkade

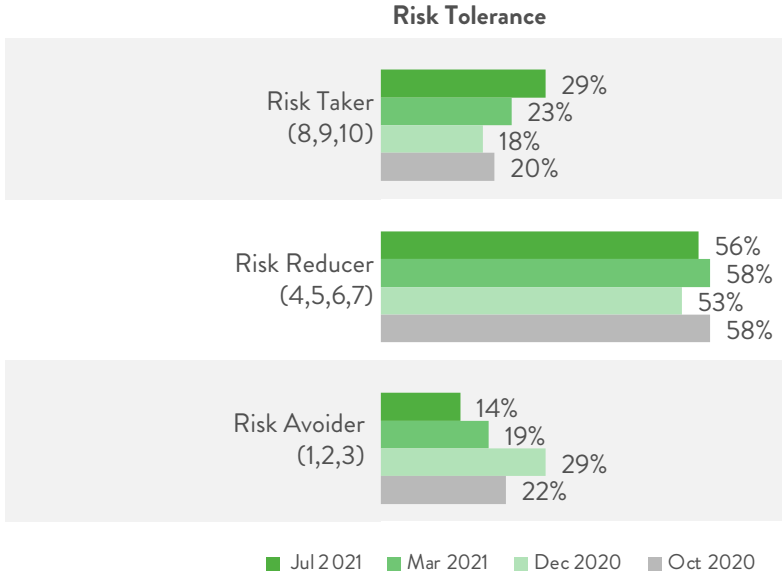
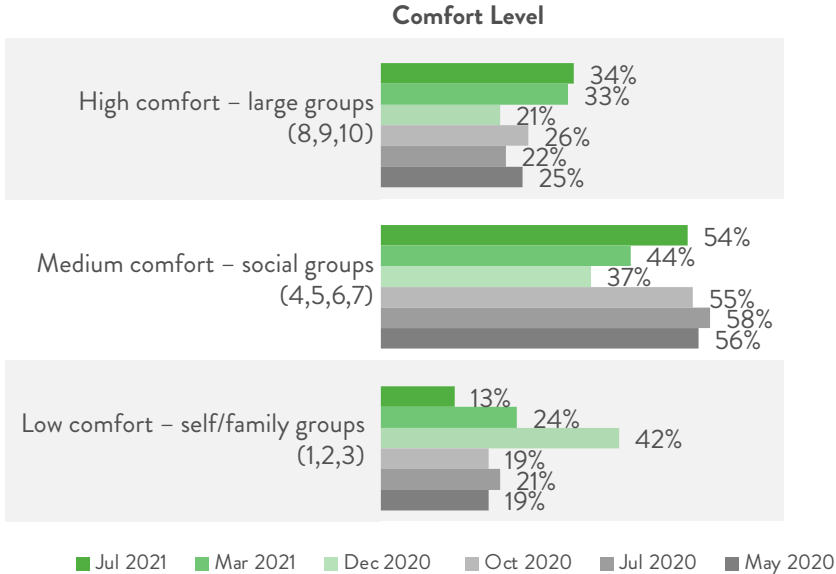


Comfort levels, risk tolerance, and consumer mindset



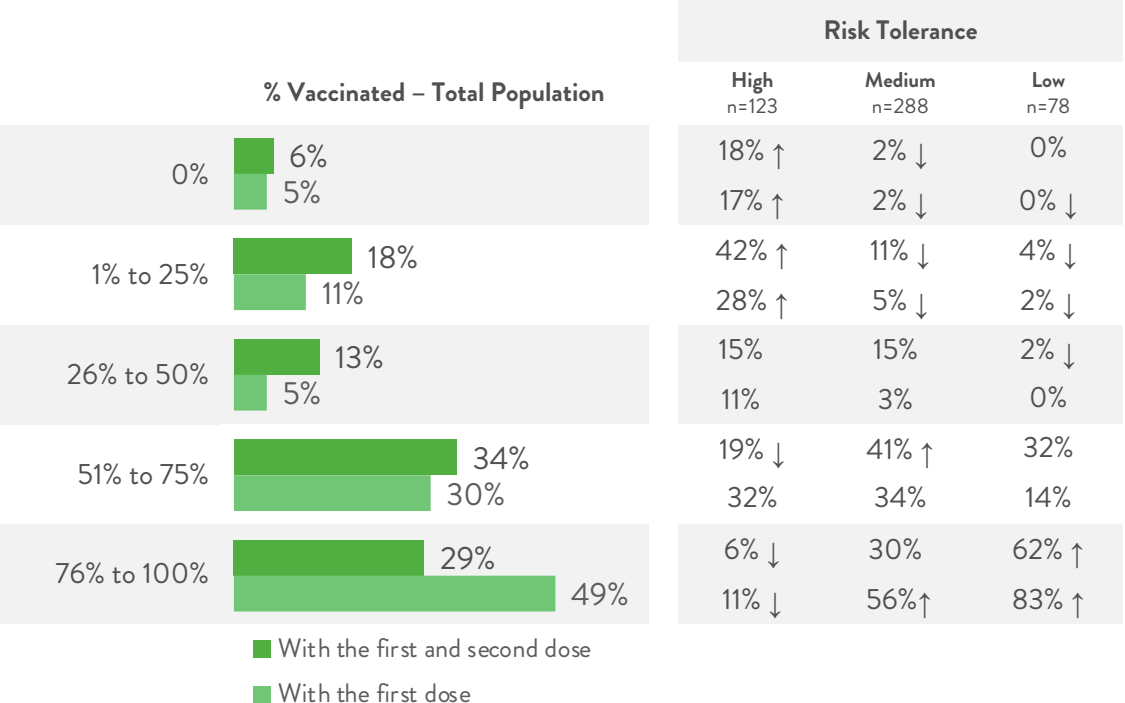
Comfort and risk tolerance are on the rise

Most notably in Calgary is the sharp decrease in those who have a “low” comfort level interacting with others or low risk tolerance.



As we enter summer, 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? In general, how would you consider your individual level of risk tolerance in day-to-day life? Average risk tolerance score. Base: Calgary (n=489)

Vaccinations remain a key component to increasing comfort levels

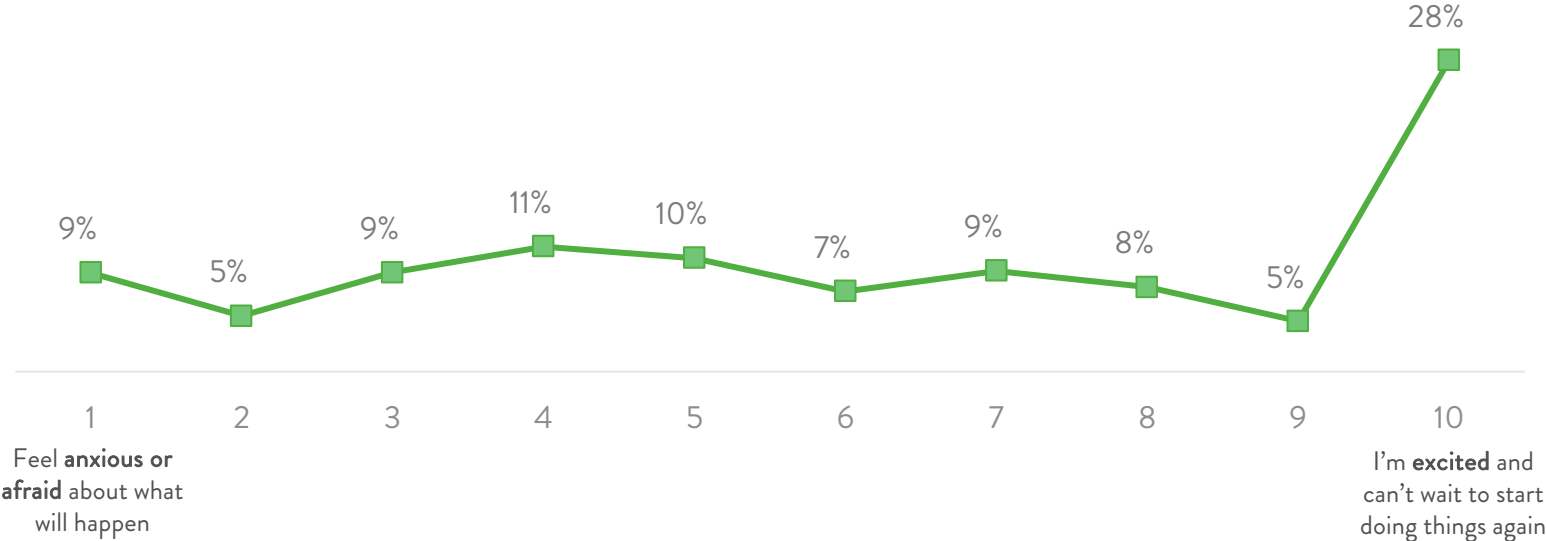




How do Calgarians feel
about re-opening?

Feelings towards re-opening vary but there is a high proportion who are excited and eager to engage

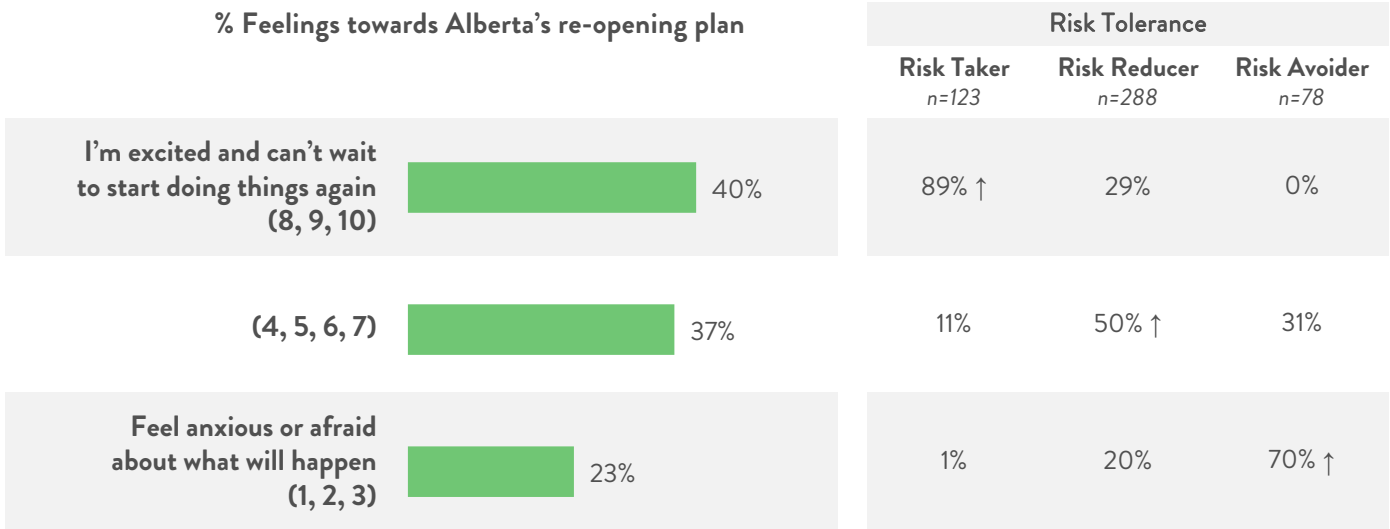
% Feelings towards Alberta's re-opening plan



Alberta recently announced its plan for re-opening in time for summer. How do you feel about it?
Base: Calgary sample (n=489)

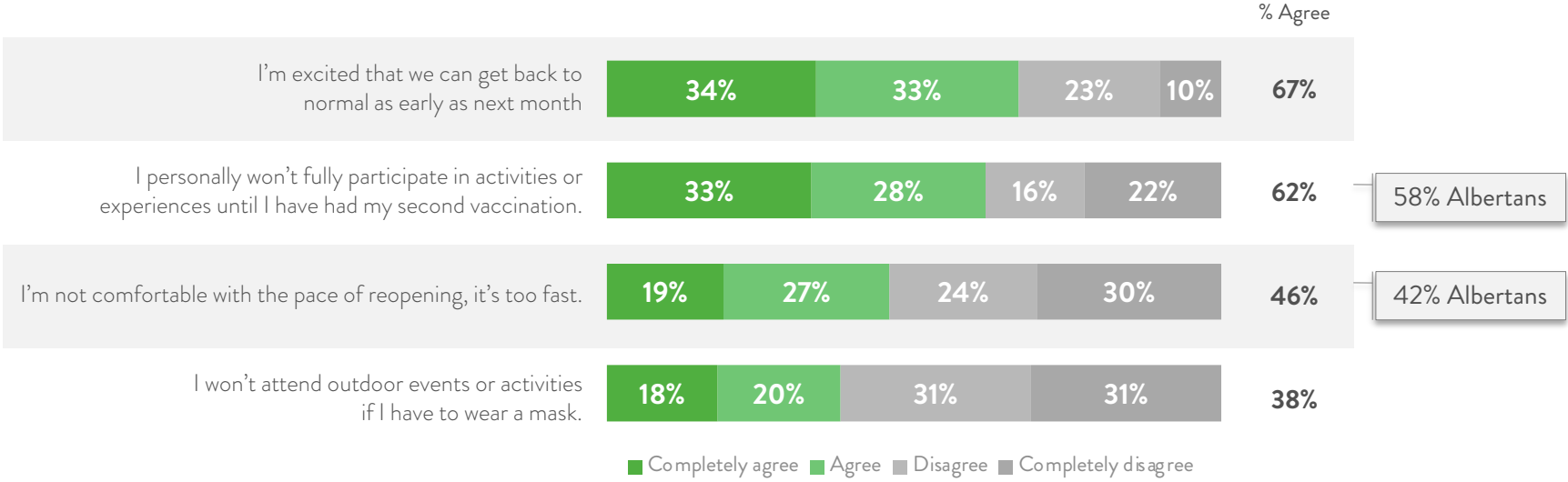
Excitement towards re-opening directly aligns with risk tolerance

While there are greater feelings of excitement than hesitation, organizations should identify where their audience sits in terms of risk – some Calgarians are ready to return and some who remain hesitant and will continue to look for other ways to engage which may impact programming decisions.



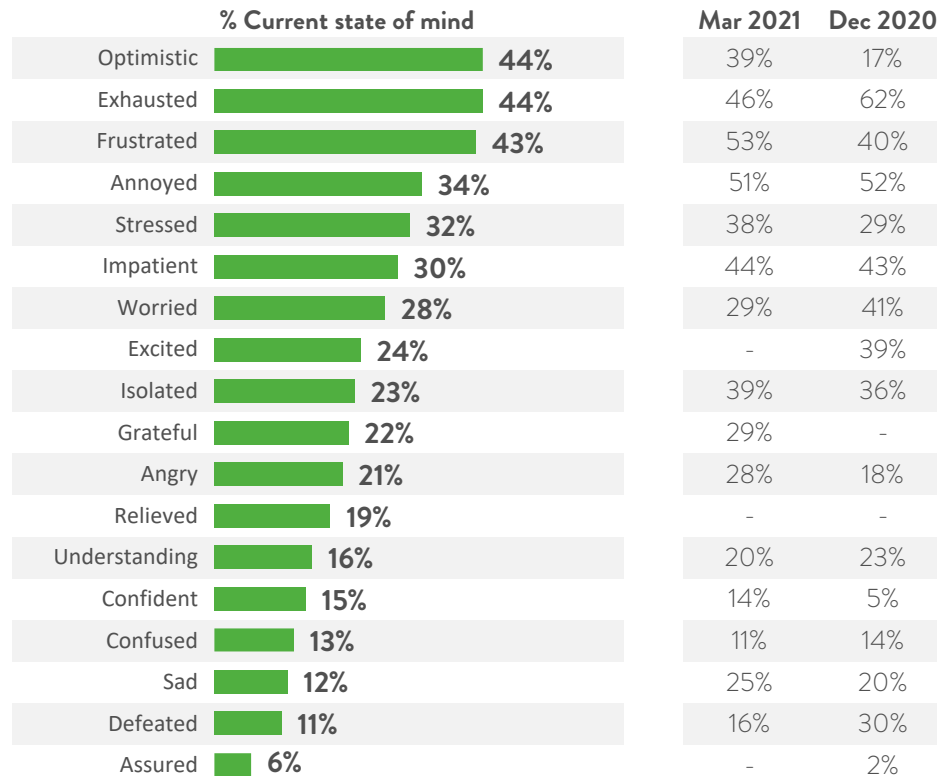
Calgarians feel a cautious excitement as restrictions loosen

It is clear Calgarians are excited to get back to normal, but city centres tend to lean more towards cautious when compared to rural areas of the province.



Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.
Base: Calgary sample (n=489)

Optimism is growing but negative emotions are still present



Negative emotions are softening over time, but continue to think about the mindset of your audience as you communicate re-engagement.

The majority understand that organizations need to re-open even if Calgarians aren't fully ready

City centres, however, have softest agreement and are the most polarized on their impression of organizations who fully move forward this summer.

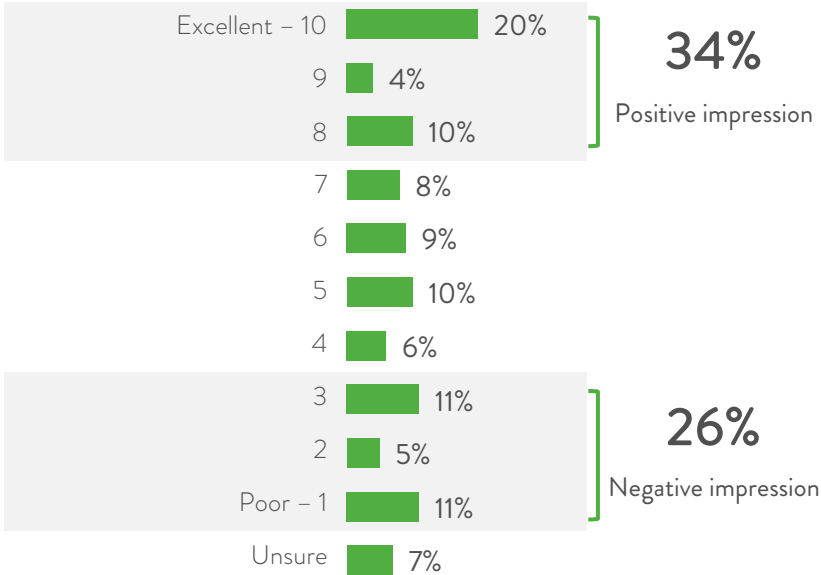
57%

AGREE

(29% strongly agree + 28% agree)

Activities and events need
to go ahead even if not
everyone is comfortable.

% Impression of organizations preparing for summer



What is your overall impression of organizations who are preparing to go ahead with live events at the beginning of summer?

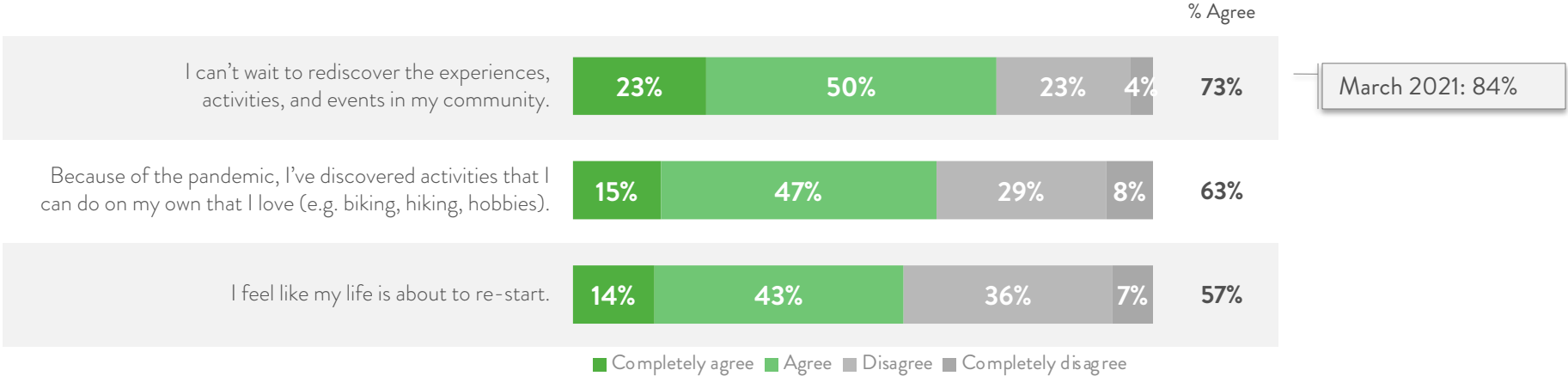
Base: Calgary sample (n=489)

A wide-angle, high-angle photograph of a busy fairground. In the foreground, a large blue tent with white snowflake patterns and the word 'Carnival' in colorful letters is partially visible. To the right, a large crowd of people is walking on a paved area. In the background, a tall yellow crane-like structure, a rainbow slide, and a Ferris wheel are visible against a city skyline. The text 'Consideration for engagement and barriers to address' is overlaid in white on the left side of the image.

**Consideration for engagement
and barriers to address**

Calgarians will balance between rediscovering old and continuing new

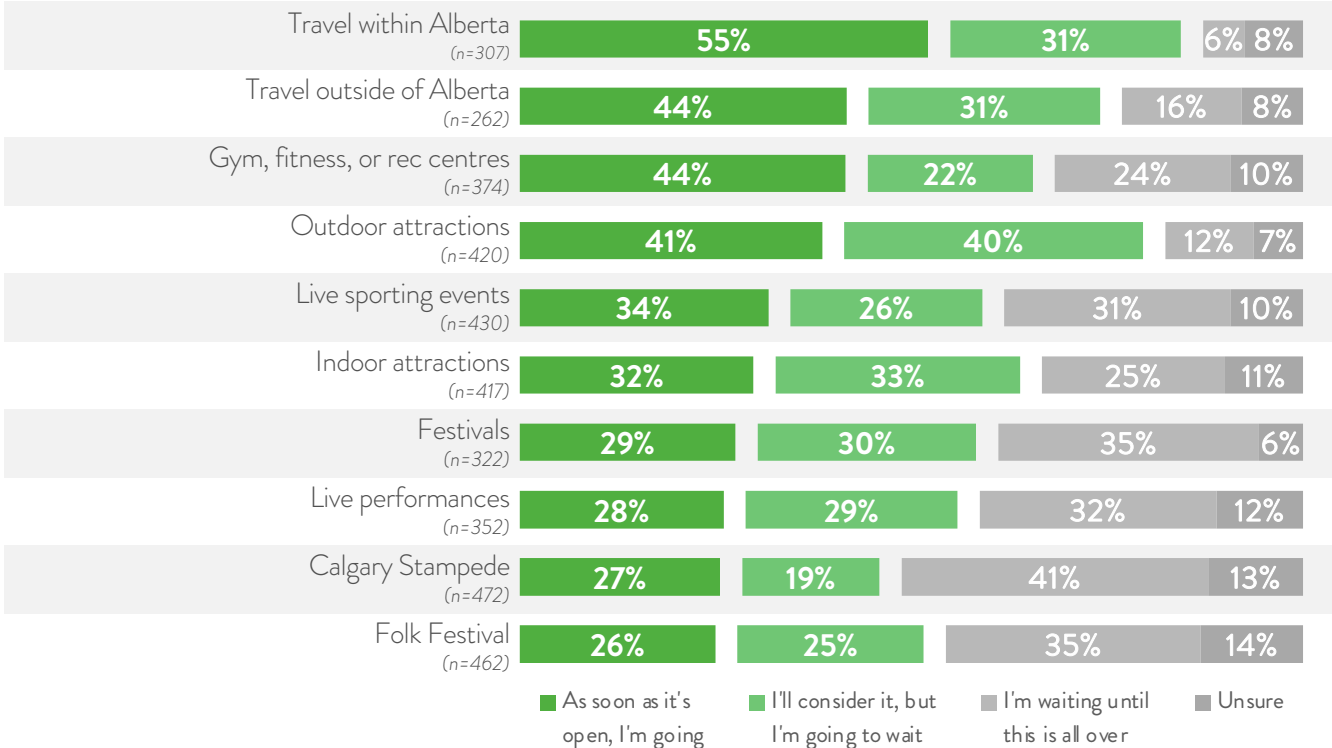
This leaves organizations with the challenge to break through and remind Albertans why their offer is a compelling choice compared to the new self-directed activities they have discovered during the pandemic.



Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.
Base: Calgary sample (n=489)

Pent-up demand is highest for travel but starts close to home

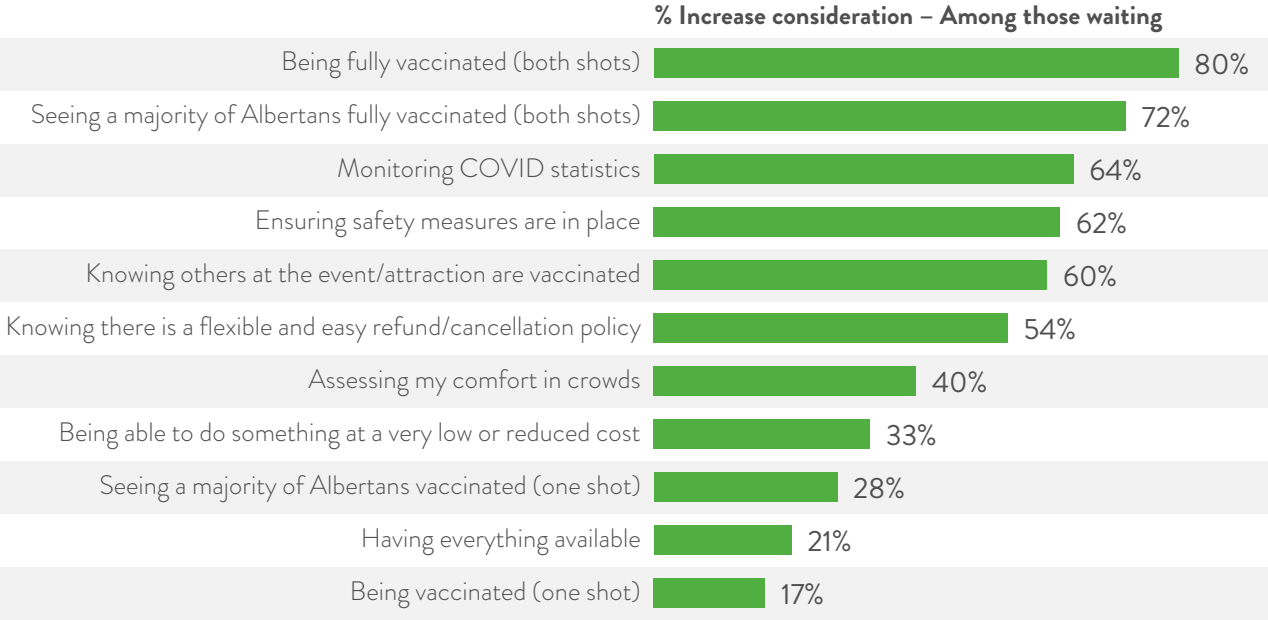
% Consideration (Among those who participate)



Thinking about the activities that you normally enjoy, assuming restrictions are coming off as planned and some health measures or safety measures will be in place, when will you consider doing those activities again? Base: Main sample, those interested in each activity (n varies)

What do cautious Calgarians need to see to increase participation?

Across the province, the need to monitor statistics (vaccine levels, caseloads) is still most important to enhance consideration. However, messaging that communicates safety and flexibility remains important and organizations will likely need to build these messages into long-term communication plans and programming to reflect a new set of consumer expectations.

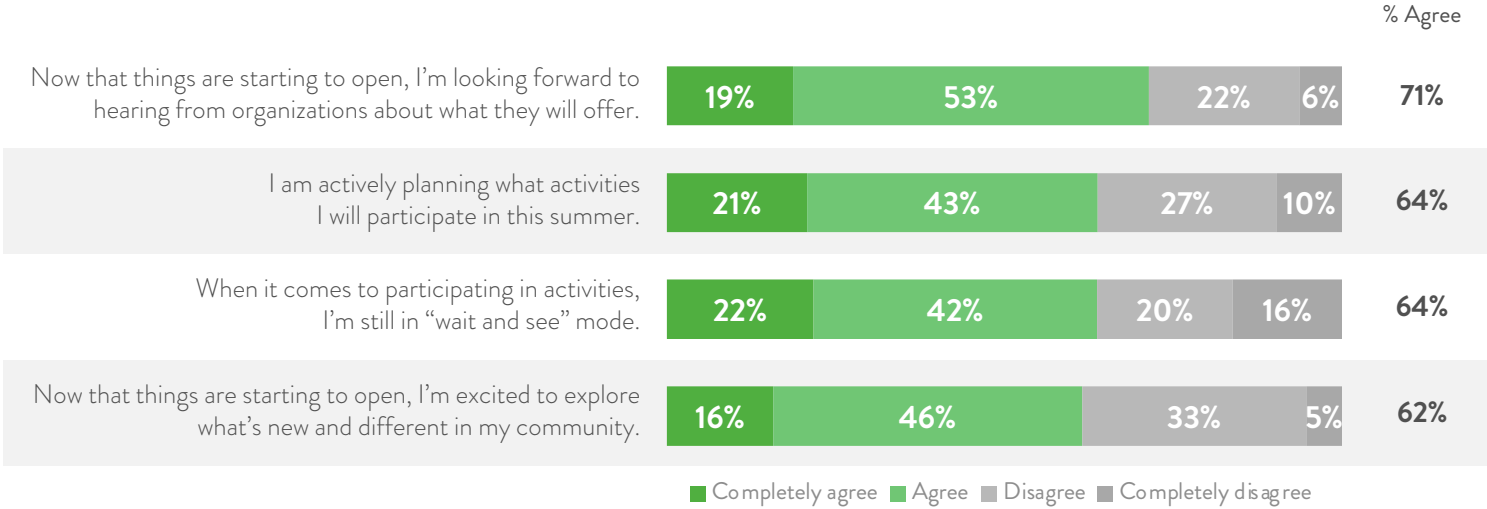


Pandemic statistics can guide organizations' expectations for increased engagement.

Safety measures, communication, and organizational transparency remain important.

You mentioned there are activities you will wait to do. Which of the following will increase your willingness to participate in events and activities?
Base: Calgary sample, considering but waiting for at least one activity (n=351)

Calgarians still want to hear directly from organizations



You mentioned there are activities you will wait to do. Which of the following will increase your willingness to participate in events and activities?

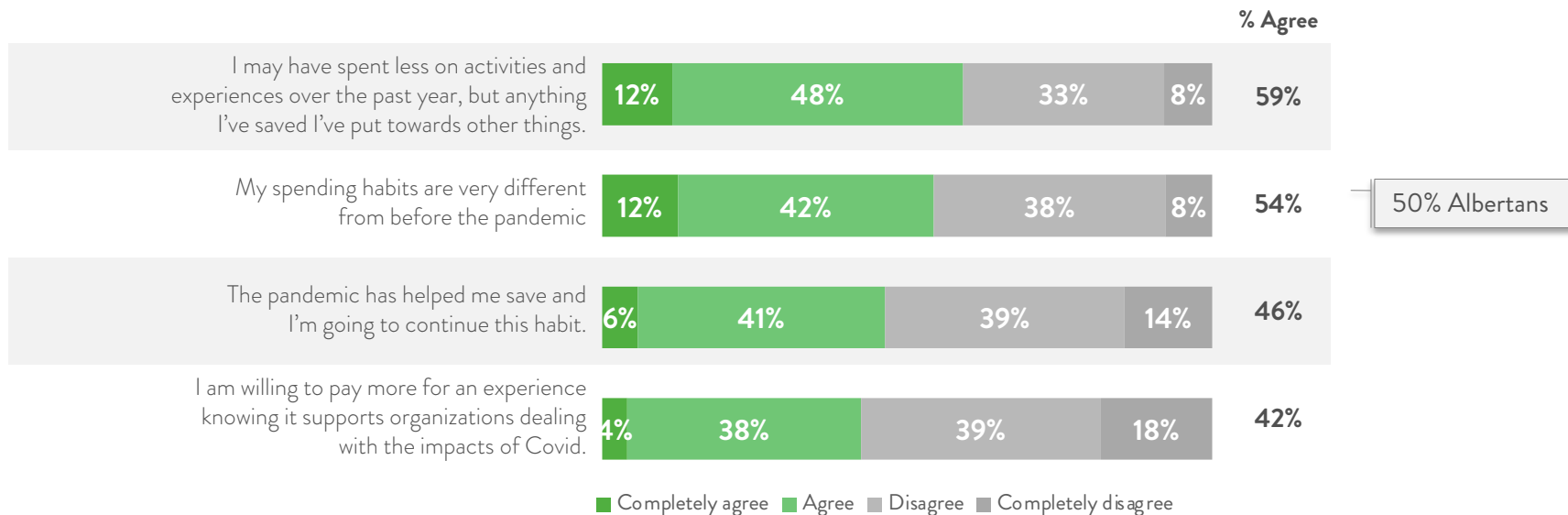
Base: Calgary sample (n=489)

Spending habits and messaging opportunities

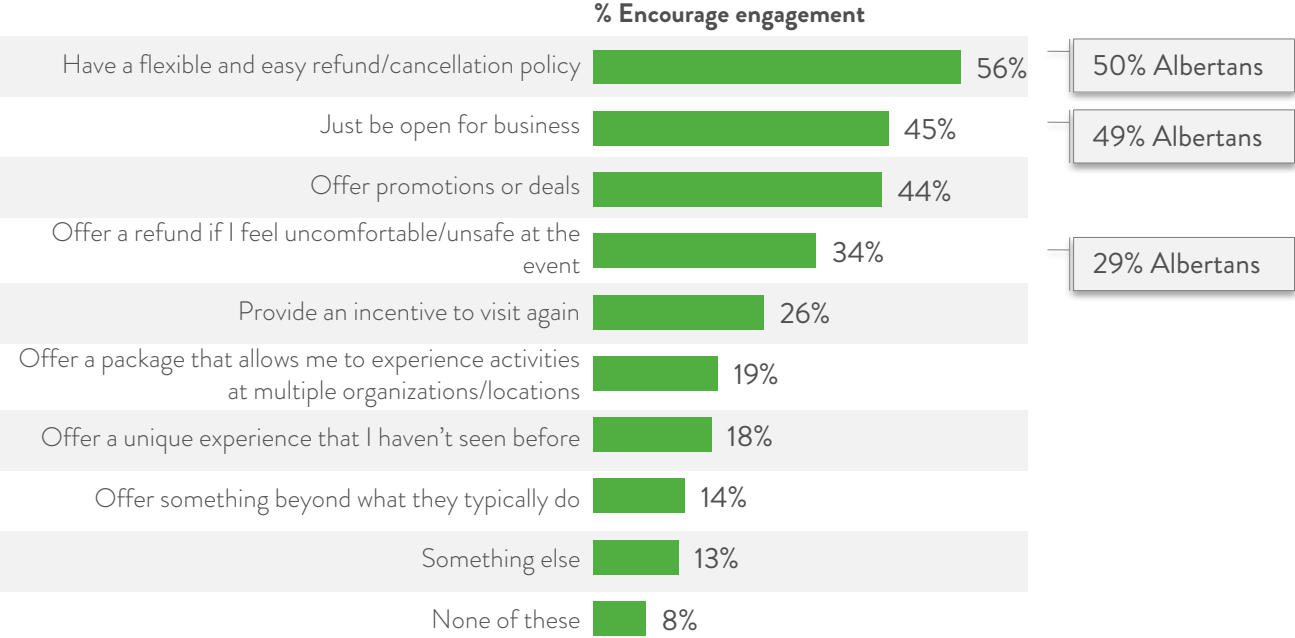


Spending habits have changed for Calgarians

Slightly more Calgarians see that their spending habits are now different. As such, expectations from organizations should be muted with respect to how Calgarians will spend, at least in the short term.

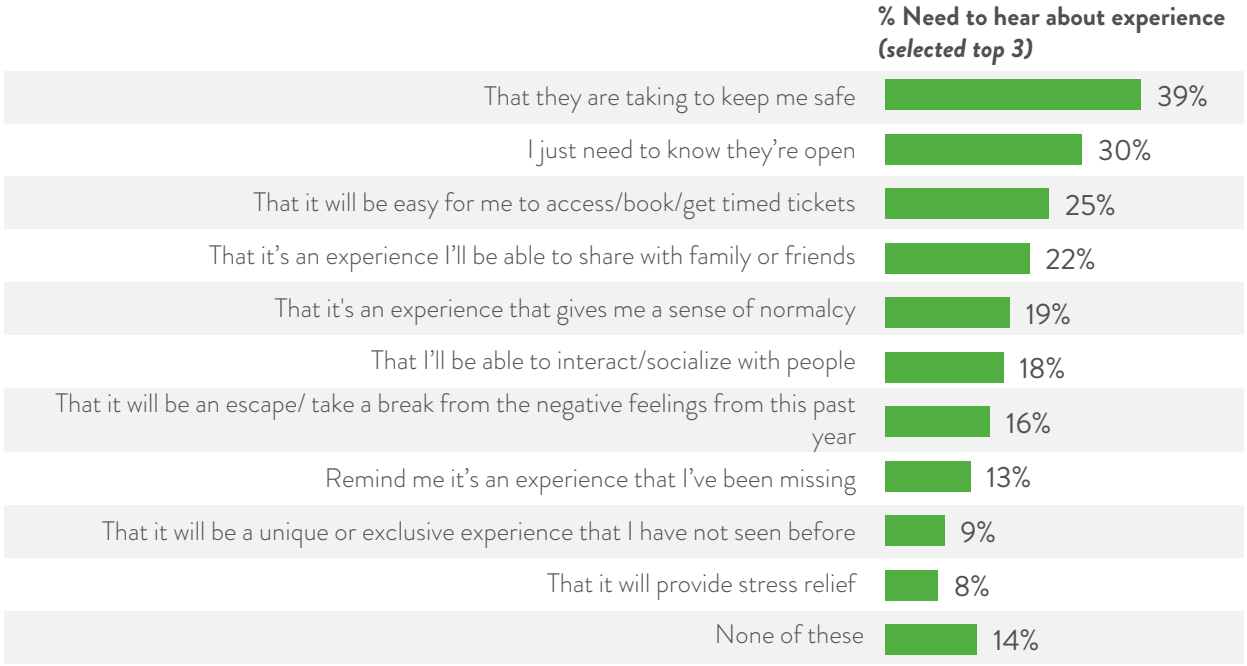


A cautious return is more apparent in city centres with the increase in flexible options compared to rural Alberta



What, if anything, could an organization do to encourage you to attend live and in-person, and spend money with them? Please select all that apply.
Base: Calgary sample (n=489)

But safety continues to be a key message



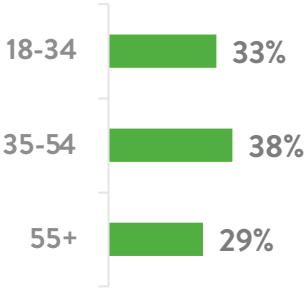
What can organizations say to you about the experiences they offer, in order to encourage you to participate or attend? Please select the top three.
Base: Calgary sample (n=489)

Respondent Profile

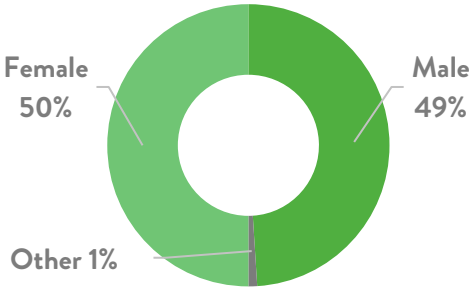


Who We Heard From (Calgary)

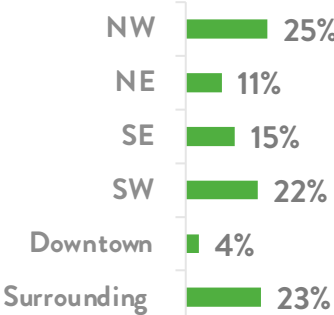
Age



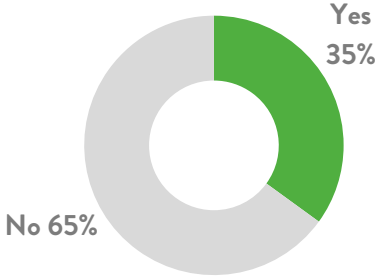
Gender



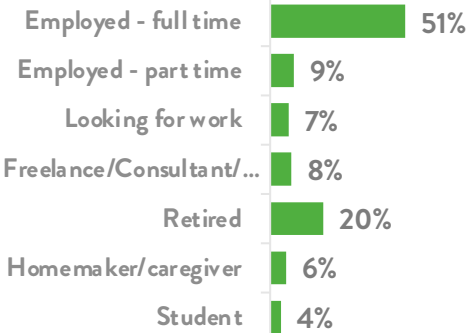
Location



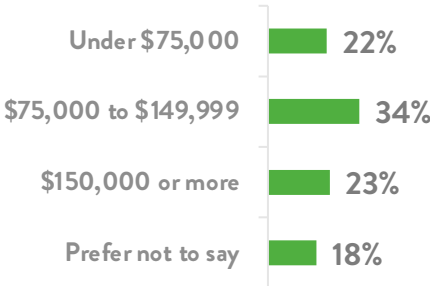
Children in the Household



Employment

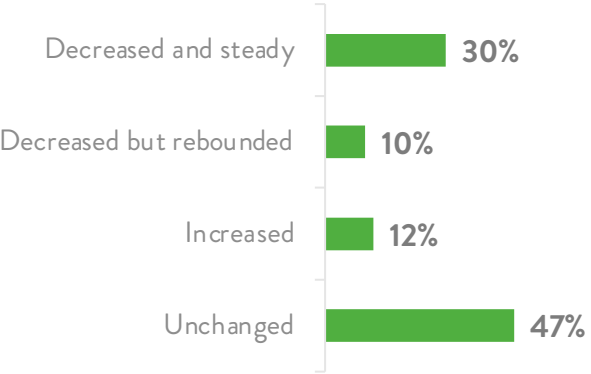


Household Income



Who We Heard From (Calgary)

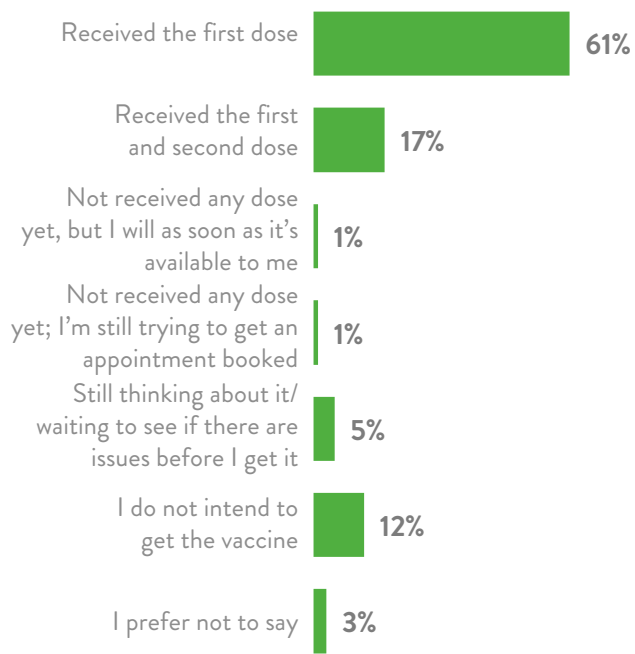
Income Changes (COVID)



Connection to COVID



Vaccination Status



**Stone —
Olafson**

Understanding people. It's what we do.