

# The NEW Experience Economy:

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

Phase 5 Results: Calgary

April 2021

# Table of contents

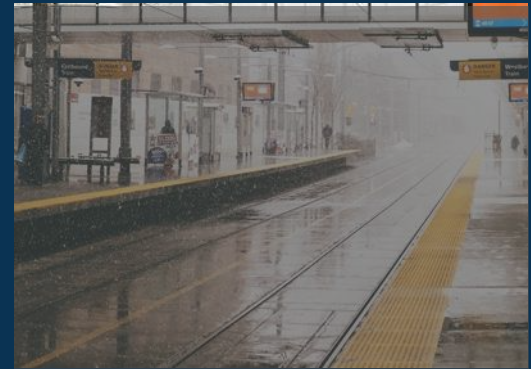
- 3 Background & Purpose
- 4 How to use this report
- 5 How is Calgary different?
- 6 Comfort levels, risk tolerance, and consumer mindset
- 12 Understanding how interests and priorities have shifted
- 17 How are attitudes and emotions impacting behaviours?
- 20 Opportunities for financial support
- 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.

Now a full year into the pandemic, restrictions are shifting again along with the availability of experiences for Albertans. The fifth round of research focuses on the following:

- Monitoring key attitudes, mindset, measures of comfort and risk;
- Understanding how priorities and interests are shifting;
- Exploring consumer expectations of financial support; and,
- Understanding attitudes towards vaccines, etc.



## 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 496 Calgary-specific surveys were collected (350 from main sample, 146 boost) from March 5<sup>th</sup> – March 22<sup>nd</sup>, 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:

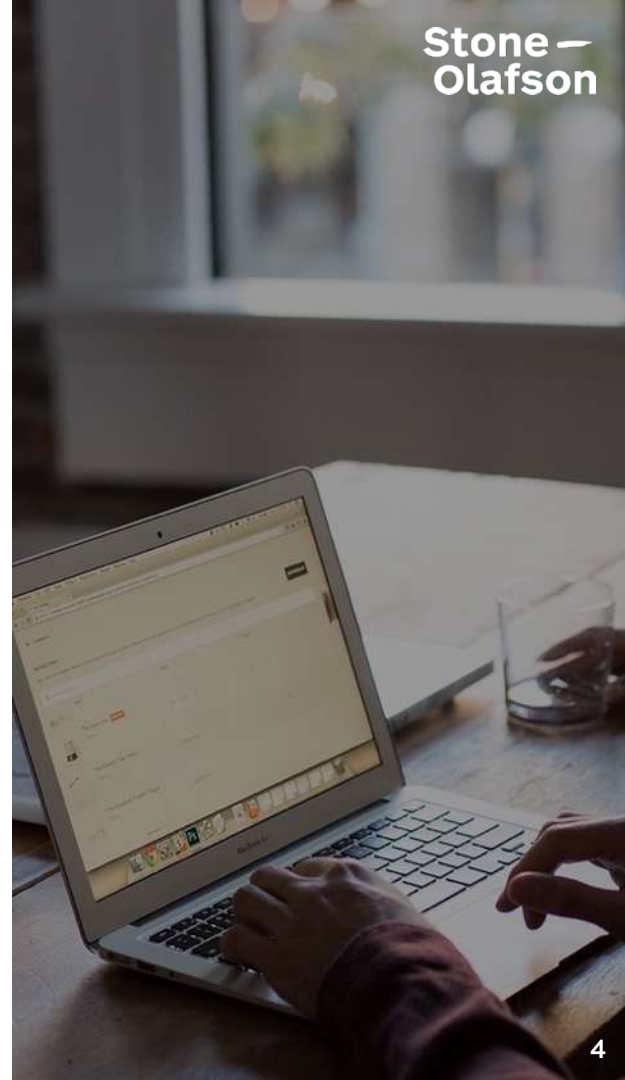
[www.stone-olafson.com/insights](http://www.stone-olafson.com/insights)

*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 levels have shifted again

We know at a macro level that comfort levels shift in cadence with case numbers. As with the rest of Alberta, comfort levels have rebounded with a greater proportion feeling at ease with larger groups. However, polarization is growing with larger numbers equally feeling high comfort vs. low comfort.

Paying attention to how the audience is feeling will allow for organizations to refine communications and programming accordingly.

2.

### Habits have changed but pent-up demand remains

There is a significant proportion of Calgarians (like Albertans) who have discovered new things to do during the pandemic but the majority are still eager to return to old activities.

This means Calgarians will continue to look for flexibility in how they pursue activities in the future – a mix of new and old, more self-directed options with flexible time commitments.

3.

### Opportunities exist to monetize experiences

The one area Calgarians area different from the rest of Alberta is that they are more likely t consider membership options for attractions (which likely reflects the breadth of options in the city). Otherwise, they are looking for similarly flexible ways to support organizations financially - gift cards, donations, etc. all allow audiences to support on their own terms.

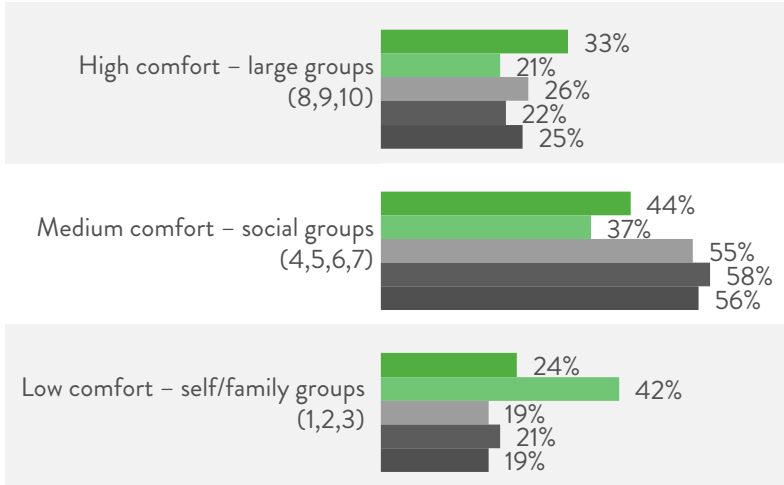




# Comfort levels, risk tolerance, and consumer mindset

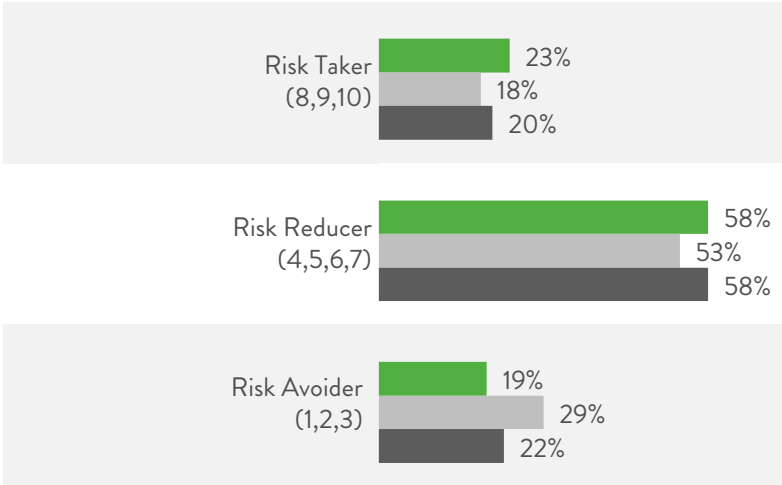
# Comfort levels have shifted again with more Calgarians feeling greater ease with large groups than previously seen

Comfort Level



■ Mar 2021 ■ Dec 2020 ■ Oct 2020 ■ Jul 2020 ■ May 2020

Risk Tolerance

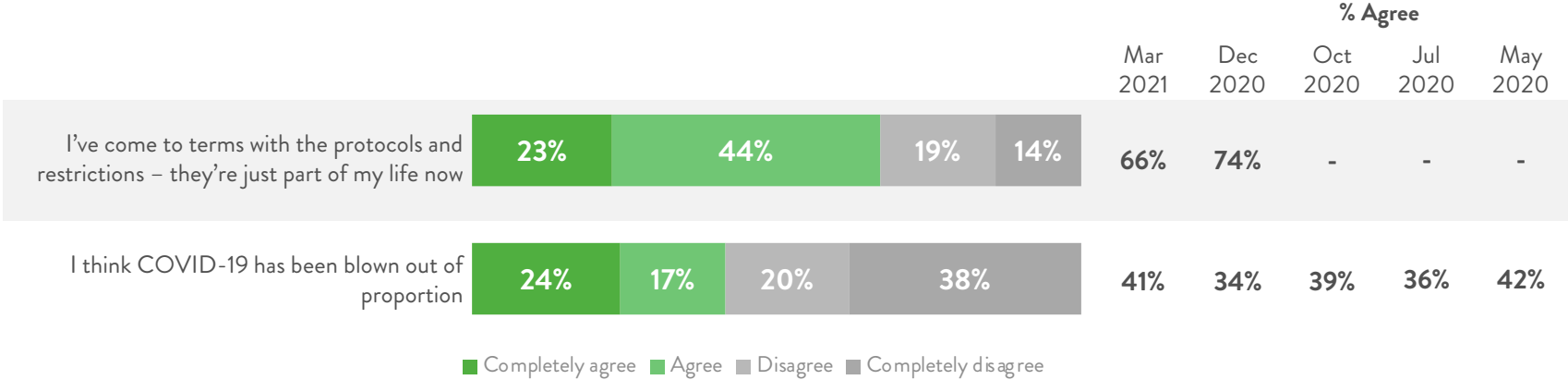


■ Mar 2021 ■ Dec 2020 ■ Oct 2020

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=496)

# And the proportion of those who feel COVID has been blown out of proportion has returned to levels seen in the early days of the pandemic

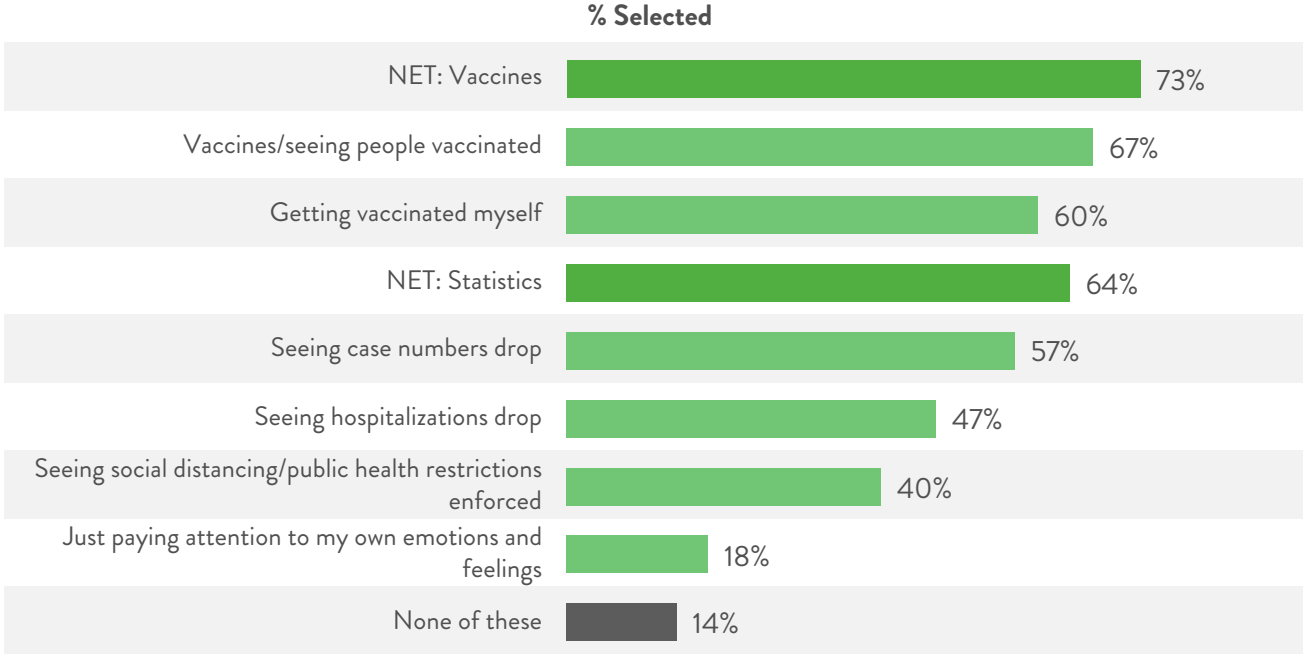
But this sentiment is in line with the rest of the province – more and more Albertans are demonstrated some fatigue with respect to COVID.



Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.  
 Base: Calgary (n=496)



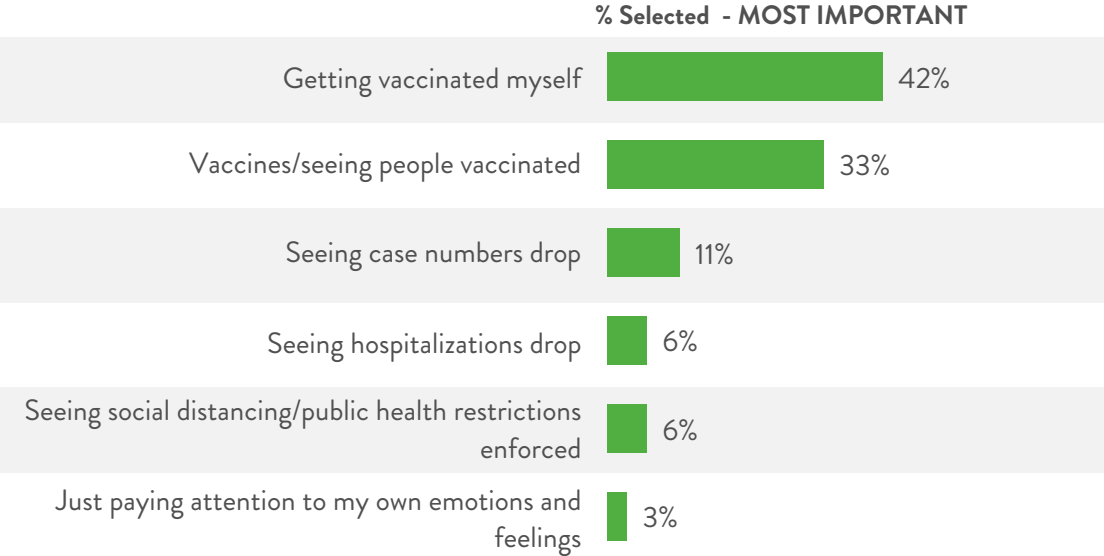
# Vaccines remain the most important tool to increasing comfort among Calgarians



A lot has changed over the course of the last year, including our understanding of what will ease uncertainty around COVID-19. Which of the following is important for you to feel more comfortable resuming regular activities?

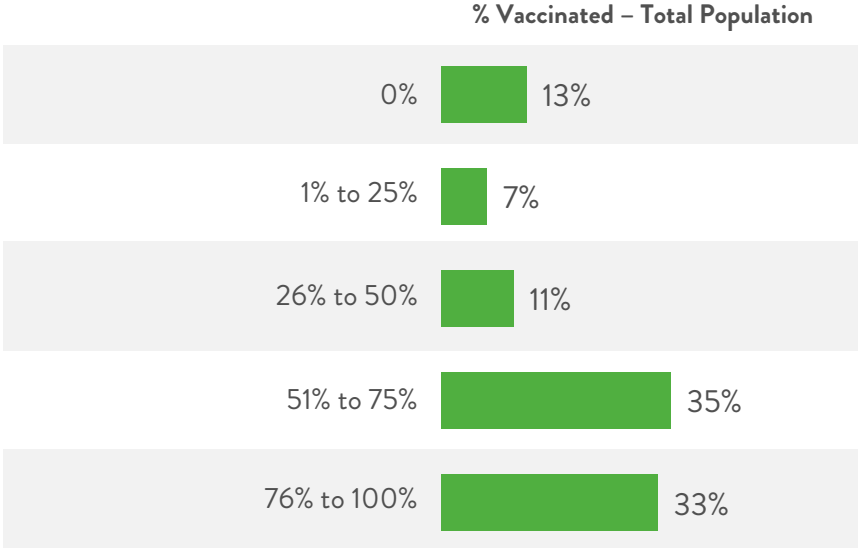
Base: Calgary (n=489).

# As with the rest of Alberta, Calgarians will feel most comfortable when they are vaccinated themselves



And which of the following is MOST important to you personally, in order to make you comfortable resuming regular activities? Base: (n=363)

# Majority of Calgarians need to see over half the population vaccinated to feel comfortable again.



The average rate of vaccination level required was 62%. Higher among:

- Females
- Older adults
- Risk avoiders

About what proportion of the population needs to be vaccinated in order for you to be completely comfortable engaging in public events and activities again? Please provide your best estimate.  
Base: Calgary, Vaccine to feel comfortable (n=422)

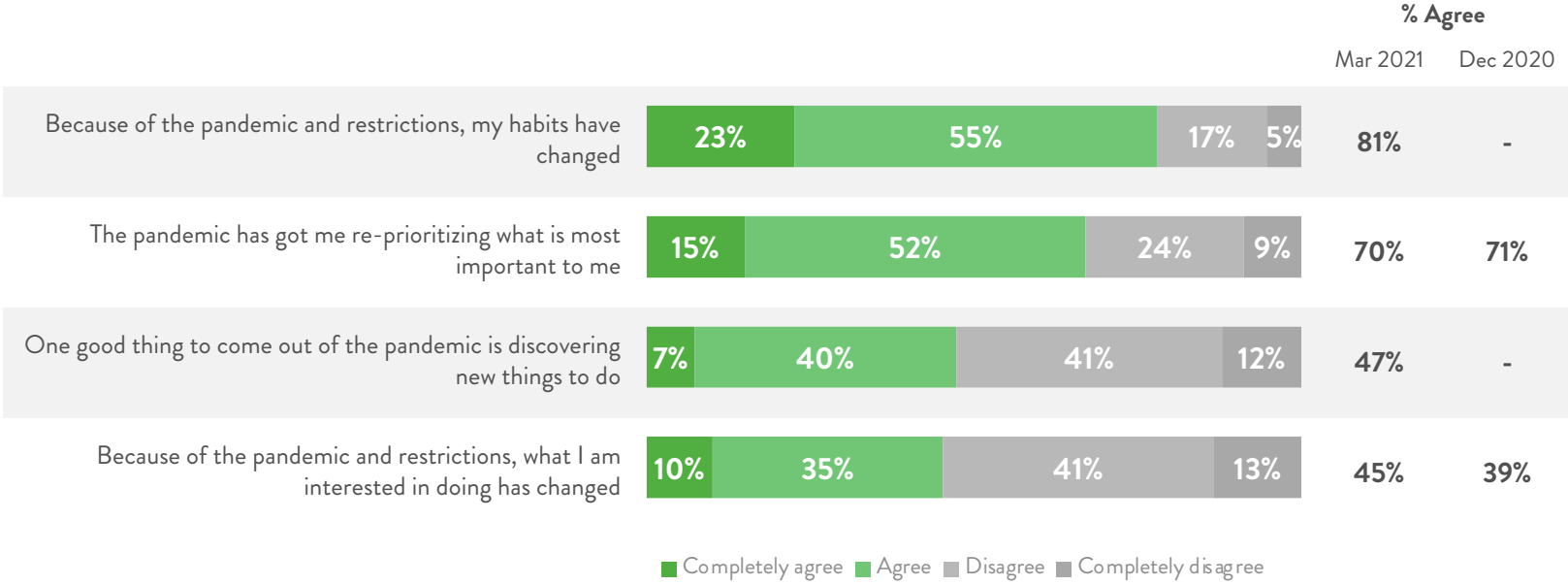


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**How have interests and priorities shifted?**

# The pandemic has forced a change in habits and behaviours, even if interests have not shifted as dramatically

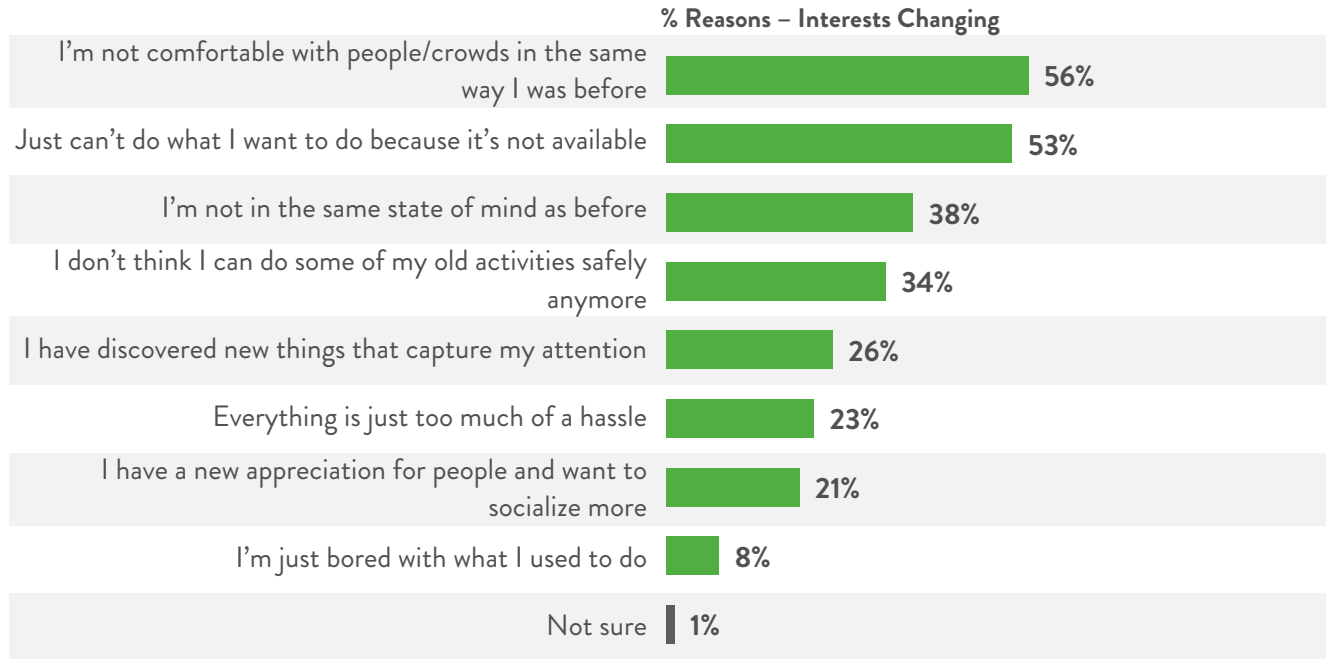
Calgarians are once again lock step with the rest of Albertans in terms of how they perceive their changes in habits vs. interests. There has been the opportunity to discover new things but for most, habits have shifted at a much higher rate than interests.



Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.  
Base: Calgary (n=496)



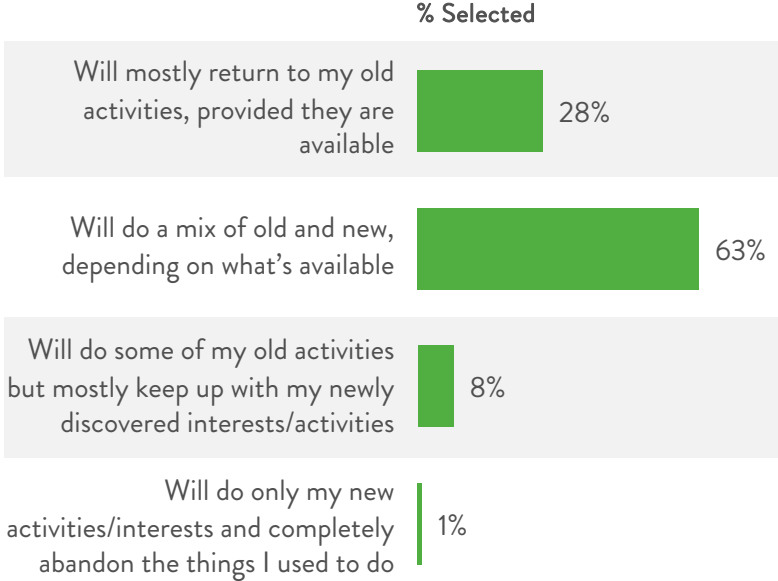
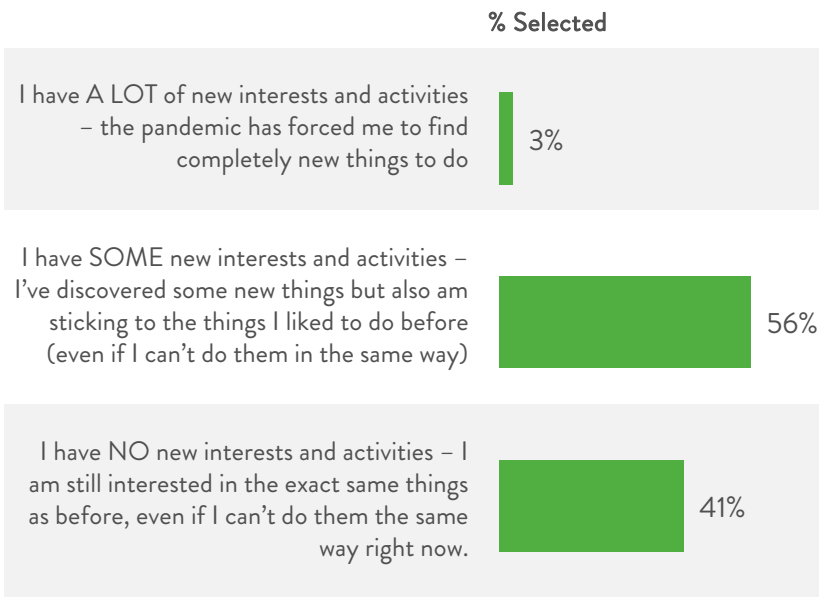
# The primary reasons for changing interests are comfort and availability



You mentioned what you are interested in doing has changed. Why is that?

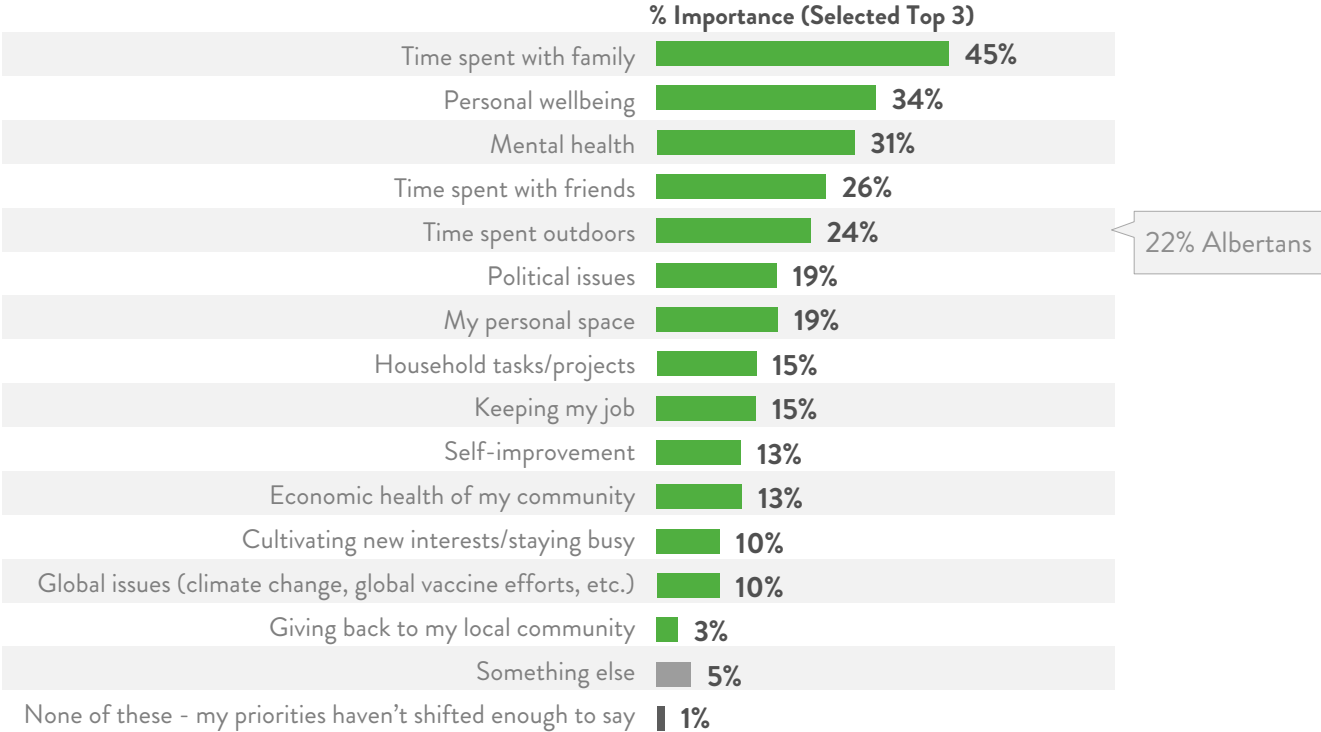
Base: Interests changing (n=223)

# Most Calgarians anticipate returning to old activities but will include newly discovered – it will all depend on what’s available



Which one of these statements best describes how you are approaching new interests and activities during this pandemic? *Base: Calgary (n=496)*  
 Once restrictions lift and conditions improve, how do you think you will approach your interests and activities in the future? *Base: Some/all new interests and activities (n=299)*

# Priorities for Calgarians are family, wellbeing, mental health and friends.



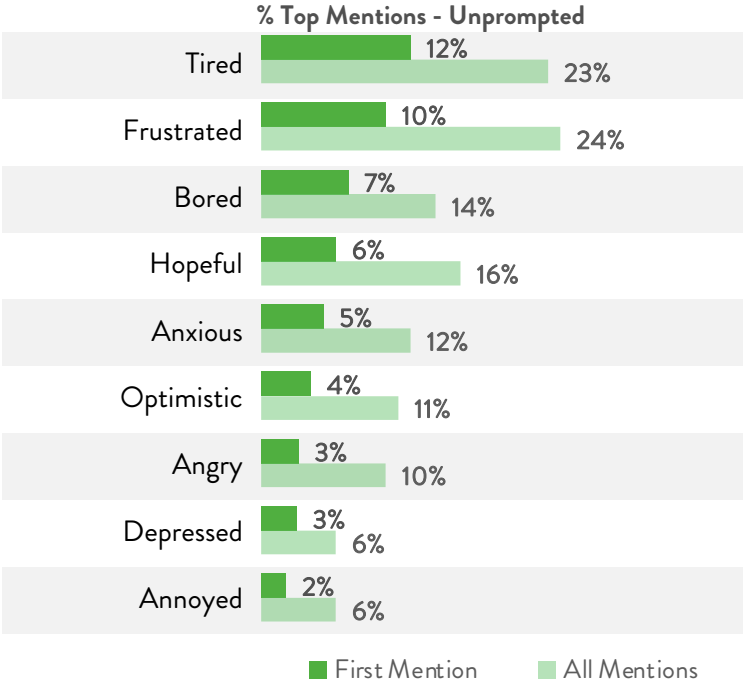
You said you find yourself re-prioritizing what is most important to you. What is more important to you now than it was this time last year, before the pandemic?  
Please select up to three items *Base: Re-prioritizing (n=347)*

**How are attitudes and emotions  
impacting behaviours?**

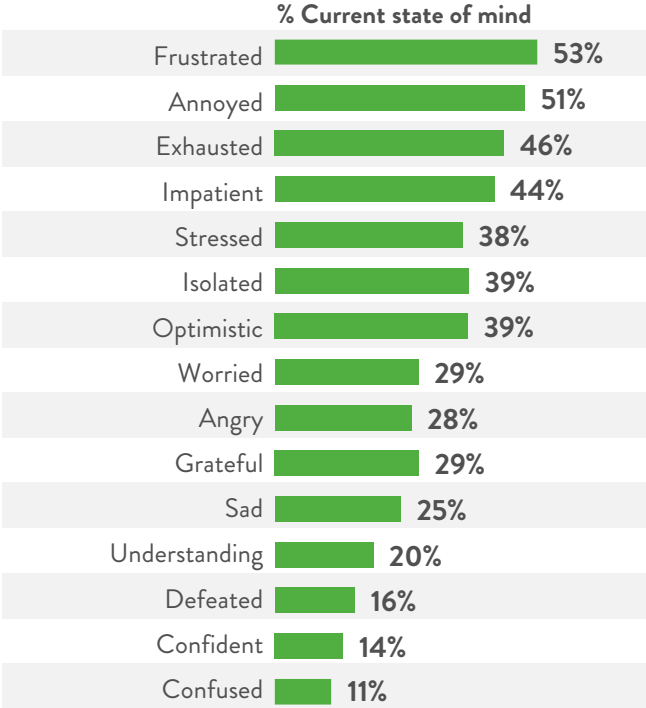


# The range of emotions experienced by Calgarians is complex; primarily negative but some hints of optimism emerging

What did Calgarians say in their own words?



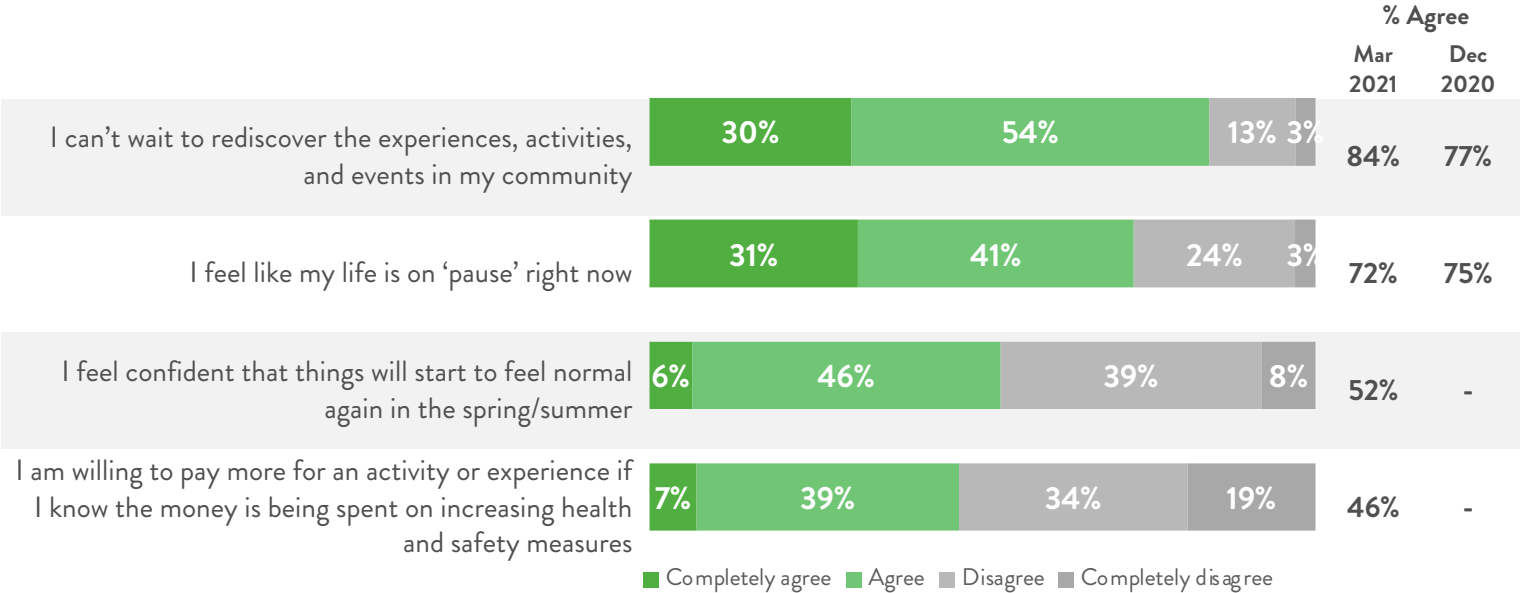
What else are they feeling?



What three words would you use to describe how you are feeling right now? *Base: Calgary, provided response (n=487)*  
 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: Calgary (n=496)*



# And the desire to rediscover is only growing, though uncertainty around when we will feel “normal” is still evident



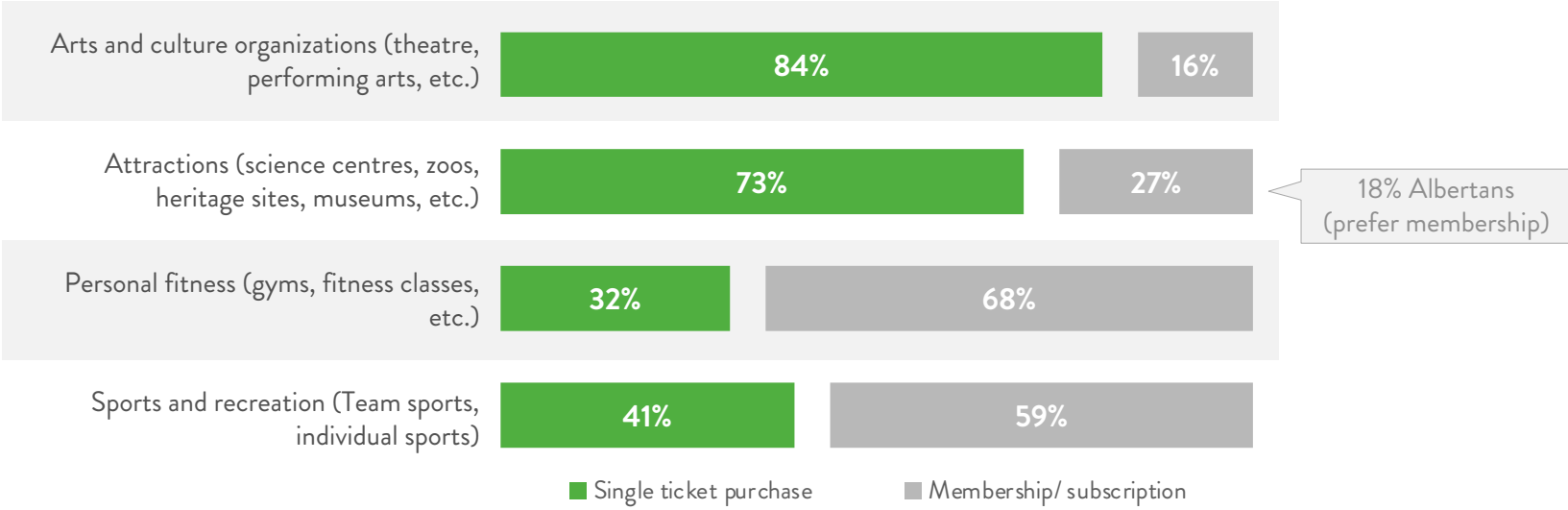
Below are a few things people might say about the current situation and how they spend their time and money – please tell us if you agree or disagree  
Base: Calgary (n=496)

# Opportunities for financial support



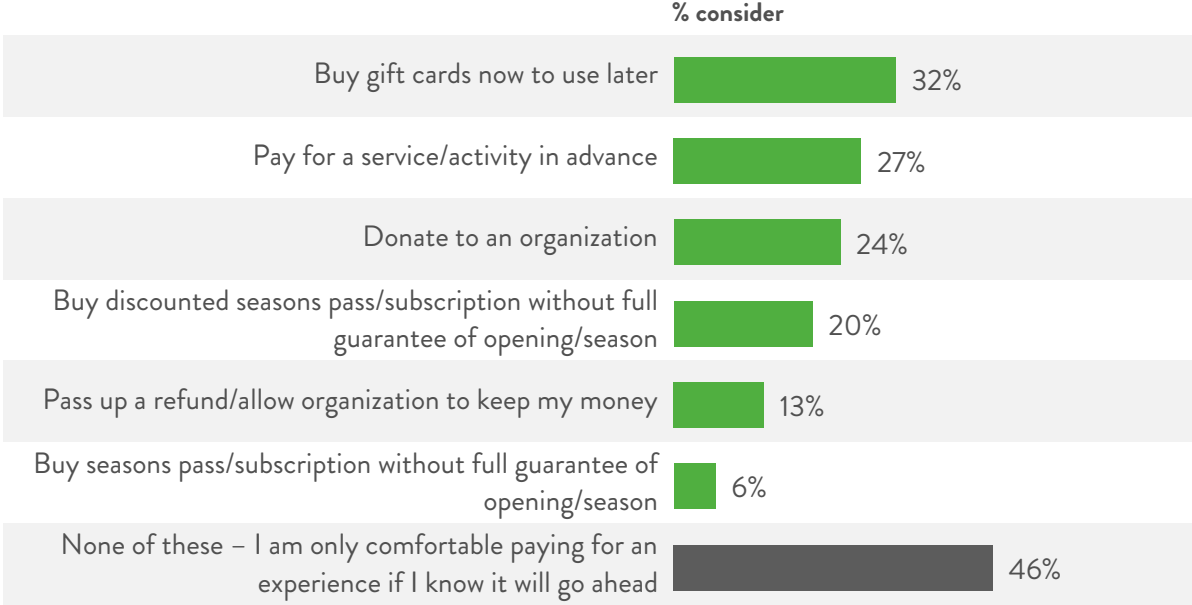
# In Calgary, visitors are more likely to consider memberships to visit attractions than the rest of the province (may reflect availability of options)

% Preferred (Among those who participate)



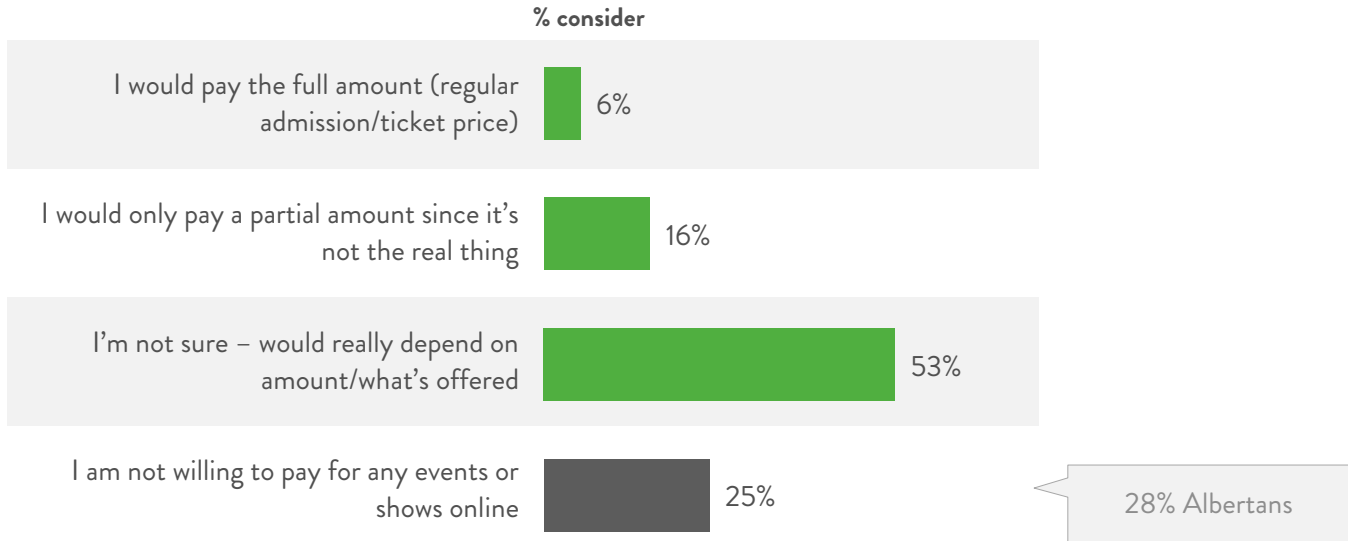
When organizations are able to offer experiences again, which of the following commitments would you be willing to make in terms of support?  
 Base: Main sample (n=496)

# But Calgarians still desire the same flexibility in support options as the rest of Albertans



Right now, there is a real challenge for organizations and businesses who are trying to offer experiences in limited form but also remain financially viable. Which of the following would you consider doing to support organizations? Please select all that apply. Base: Calgary (n=496)

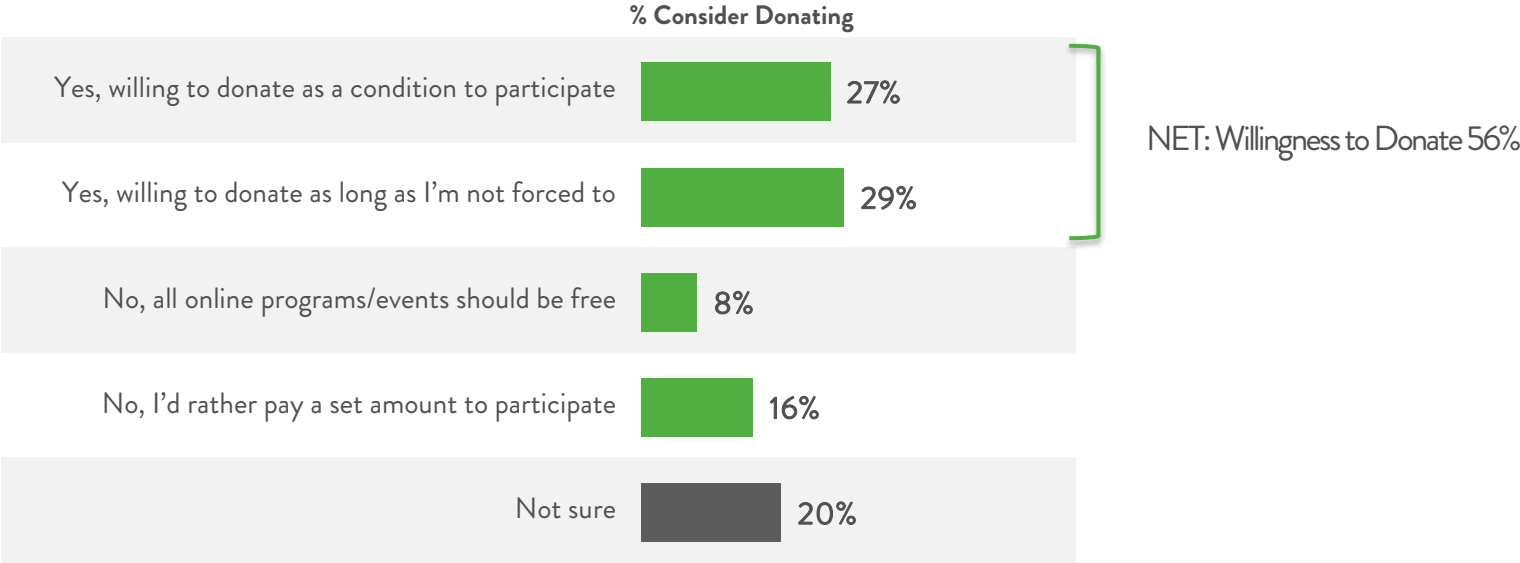
# Willingness to pay for online events still hinges on the offer; few willing to pay a full amount



The shift to online offerings, either completely or in hybrid form has meant organizations have had to consider different financial models. How would you be willing to pay for online shows or events? *Base: Main Sample (n=496)*



# And just over half of Calgarians are willing to consider donating at as a condition to participate in an online event



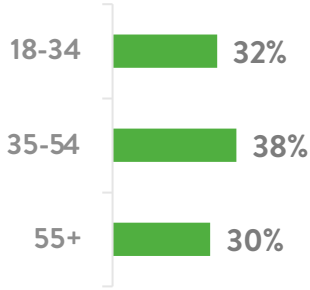
If you weren't forced to pay but could donate any amount you wanted, would you be willing to donate instead?

Base: Calgary (n=496)

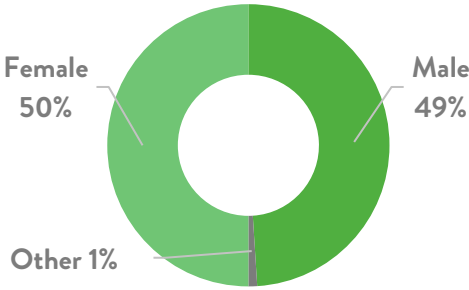
# Respondent Profile

# Who We Heard From (Calgary)

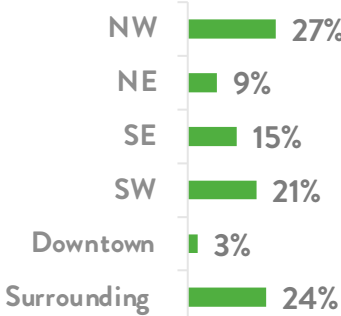
## Age



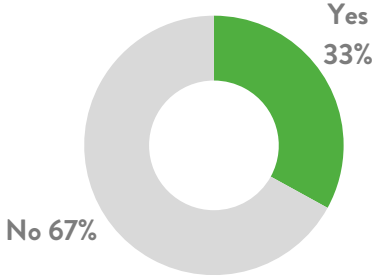
## Gender



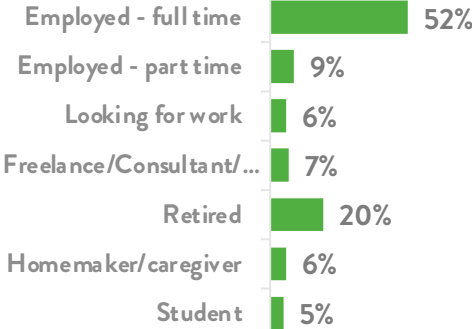
## Location



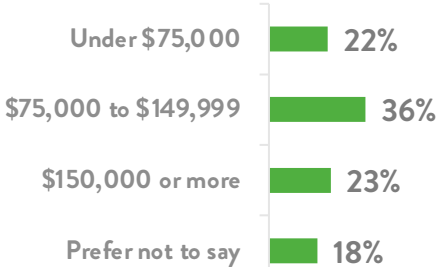
## Children in the Household



## Employment

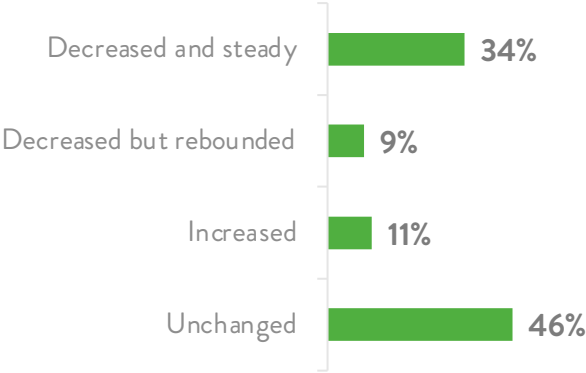


## Household Income

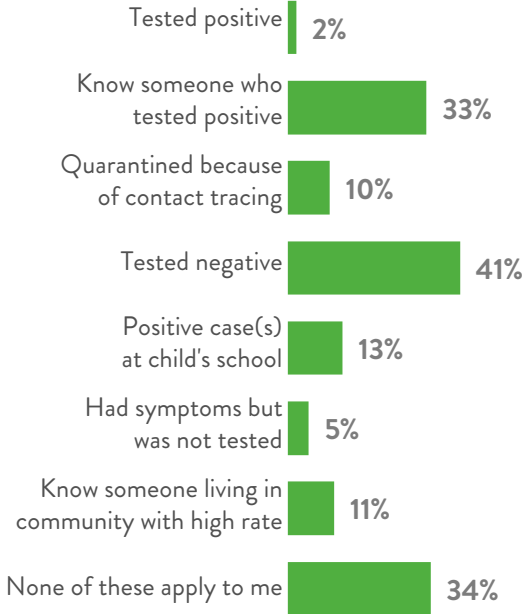


# Who We Heard From (Calgary)

## Income Changes (COVID)



## Connection to COVID



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