



The NEW Experience Economy:

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

Phase 5 Results: Edmonton
April 2021

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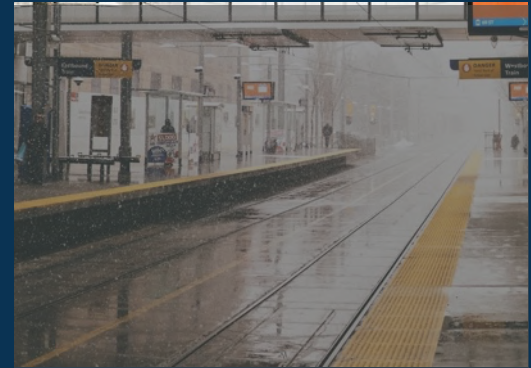
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Background & Purpose

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.

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 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 499 Edmonton-specific surveys were collected (277 base surveys, 222 boost) from March 5th – March 22nd, 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:

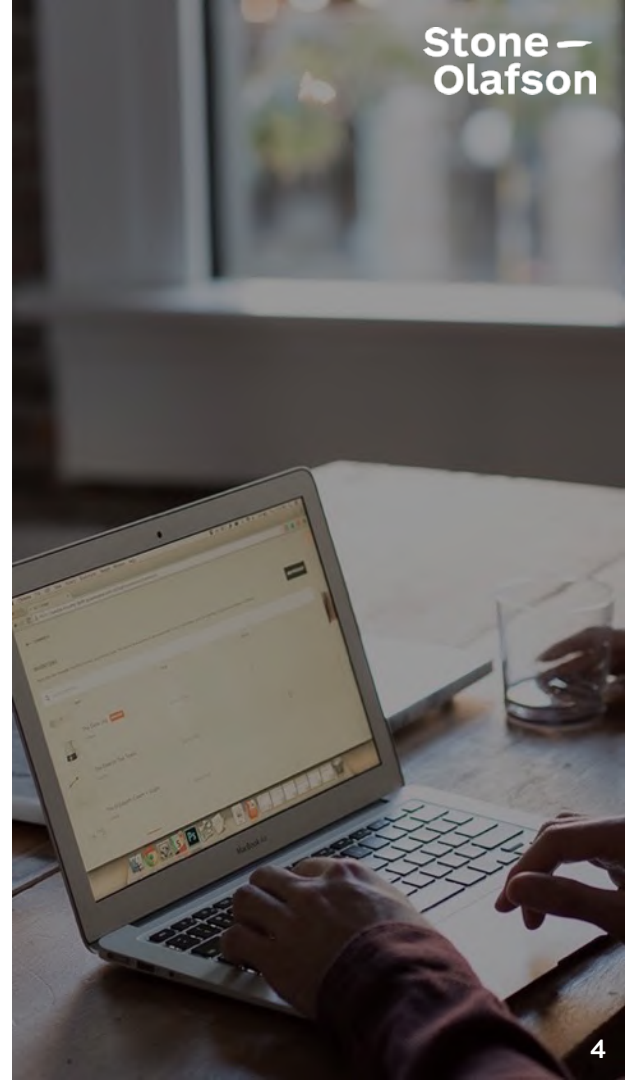
www.stone-olafson.com/insights

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.



What is different in Edmonton?

1.

Comfort levels have rebounded; still lowest across the province

Comfort levels have predictably shifted with case numbers (and may fluctuate again). Compared to the winter, they have rebounded but are still in a precarious state in Edmonton.

2.

The vaccine threshold is higher in Edmonton

Reflecting comfort and risk levels, Edmontonians seem to desire a higher proportion of Albertans to be vaccinated before they feel entirely at ease with large groups. Regardless, vaccines are the most important factor across the province that will drive comfort.

3.

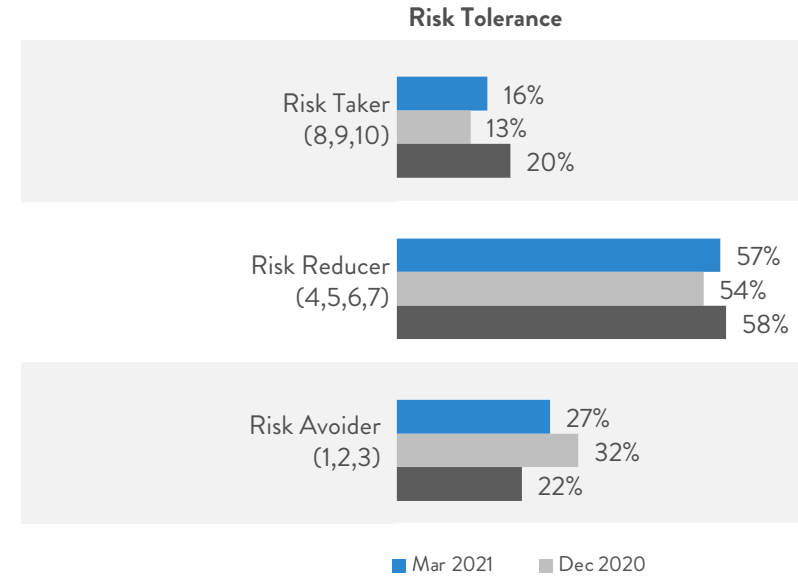
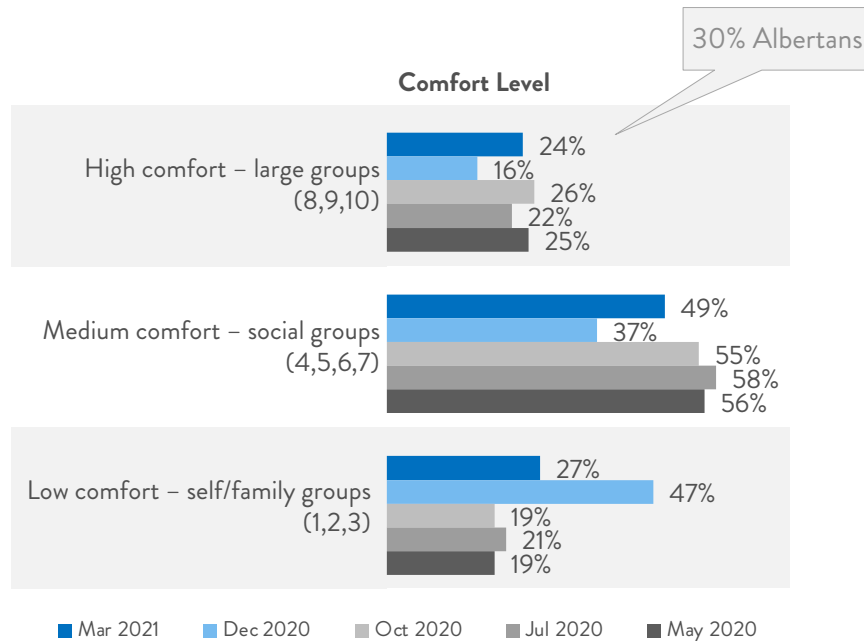
Opportunities exist to monetize experiences.

Edmontonians are more likely to consider single entry options for sports and rec opportunities. This goes a bit against the provincial trend and might present some unique opportunities for the sector in Edmonton. Otherwise, they are still looking for the same flexible ways to support organizations financially.

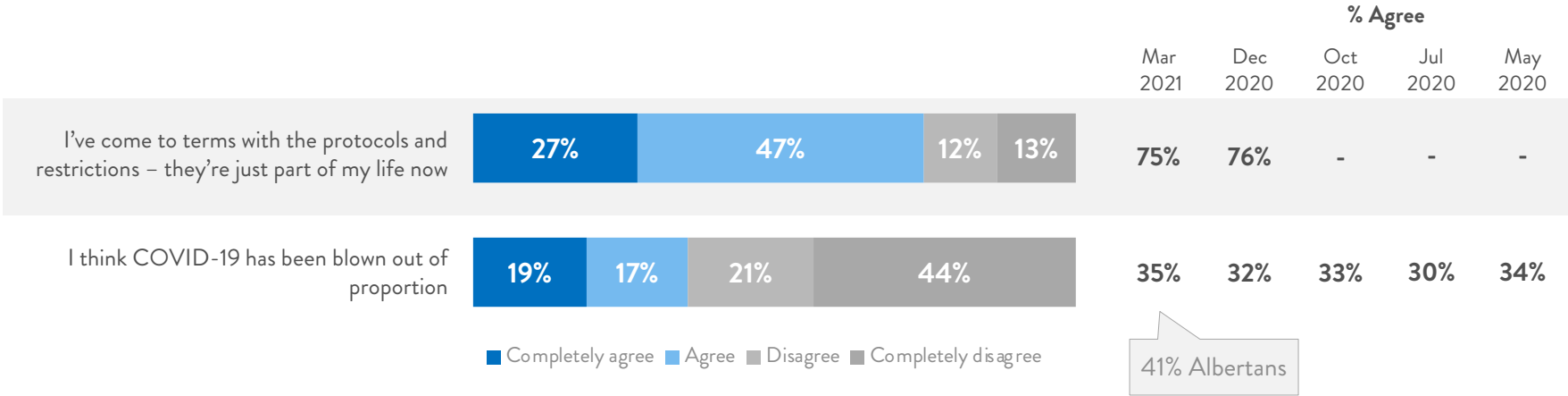
Comfort levels, risk tolerance, and consumer mindset



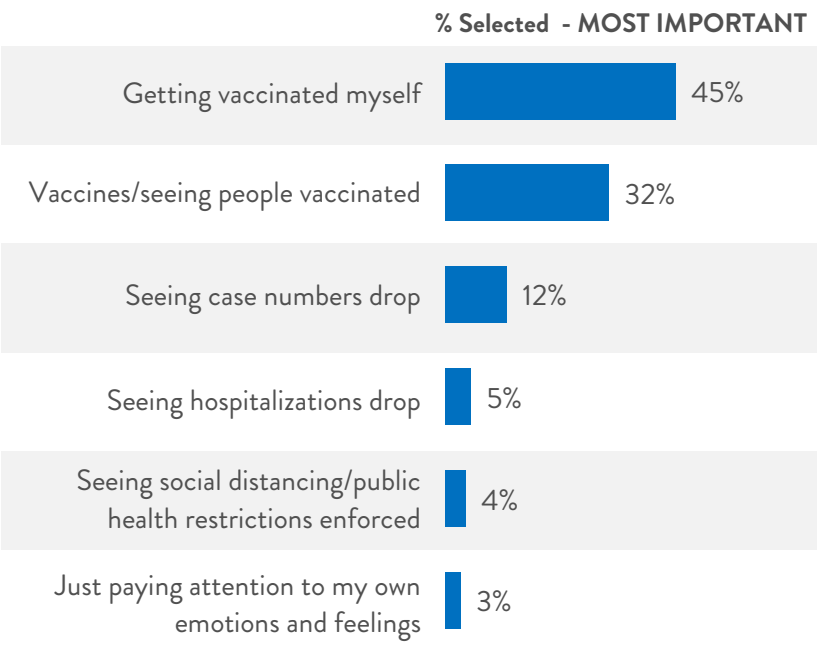
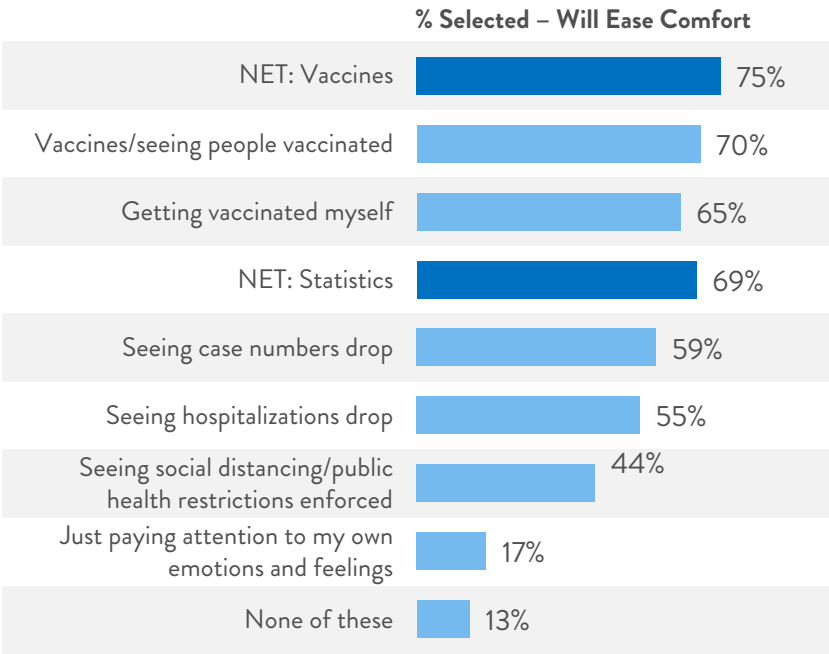
As with the rest of Alberta, comfort has rebounded but remains lower in Edmonton than the rest of the province.



Edmontonians are still more likely to accept protocols and restrictions than the rest of the province; also less likely to see COVID as blown out of proportion



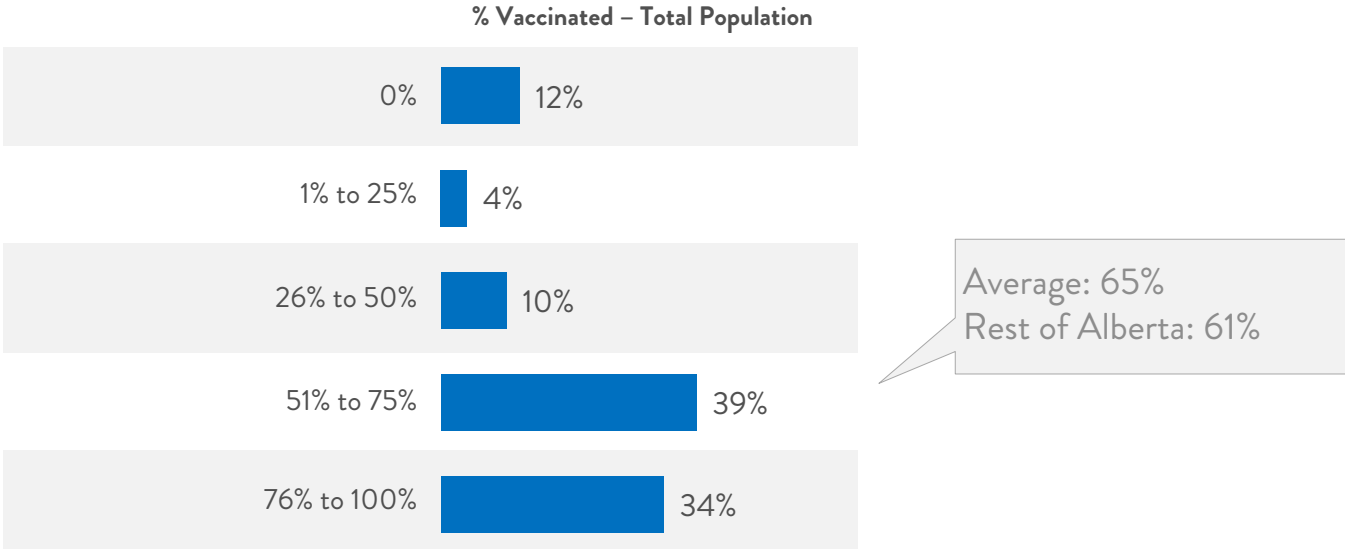
Vaccines are still the most important tool to increasing comfort



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: Edmonton (n=476).

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

Reflecting a softer comfort levels overall, Edmontonians have a slightly higher threshold for acceptable vaccination rates compared to the rest of the province

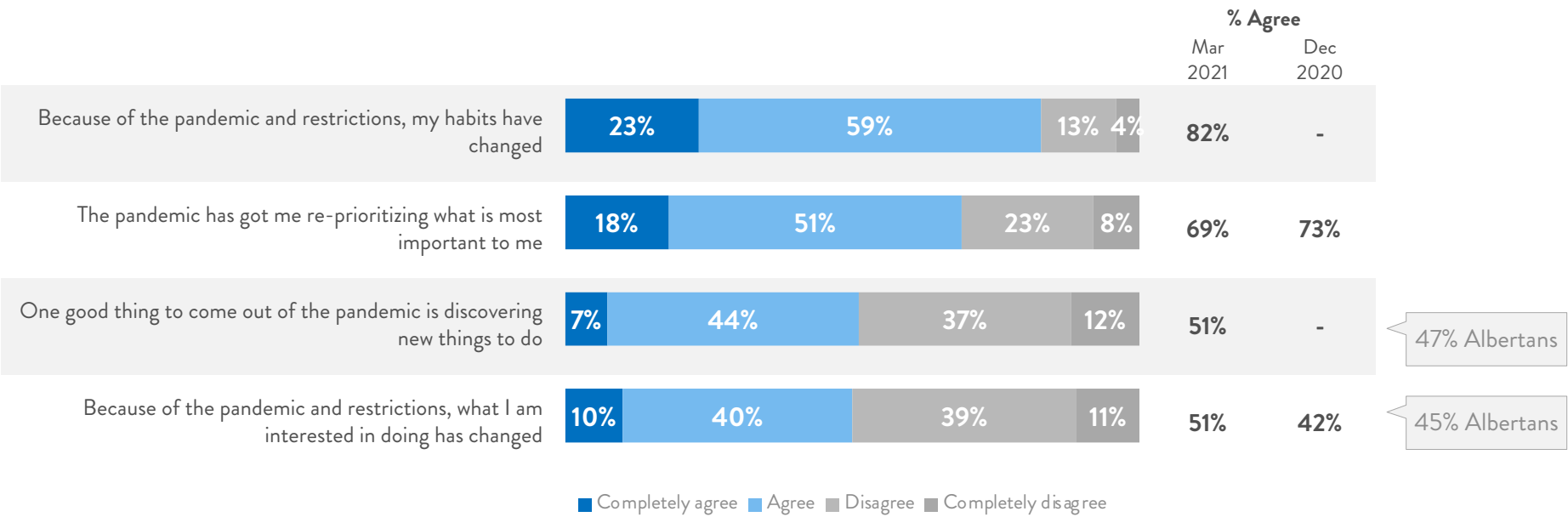


About what proportion of the population needs to be vaccinated in order for you to be completely comfortable engaging in public events and activities again? Please provide your best estimate.
Base: Edmonton, Vaccine to feel comfortable (n=423)

How have interests and priorities shifted?

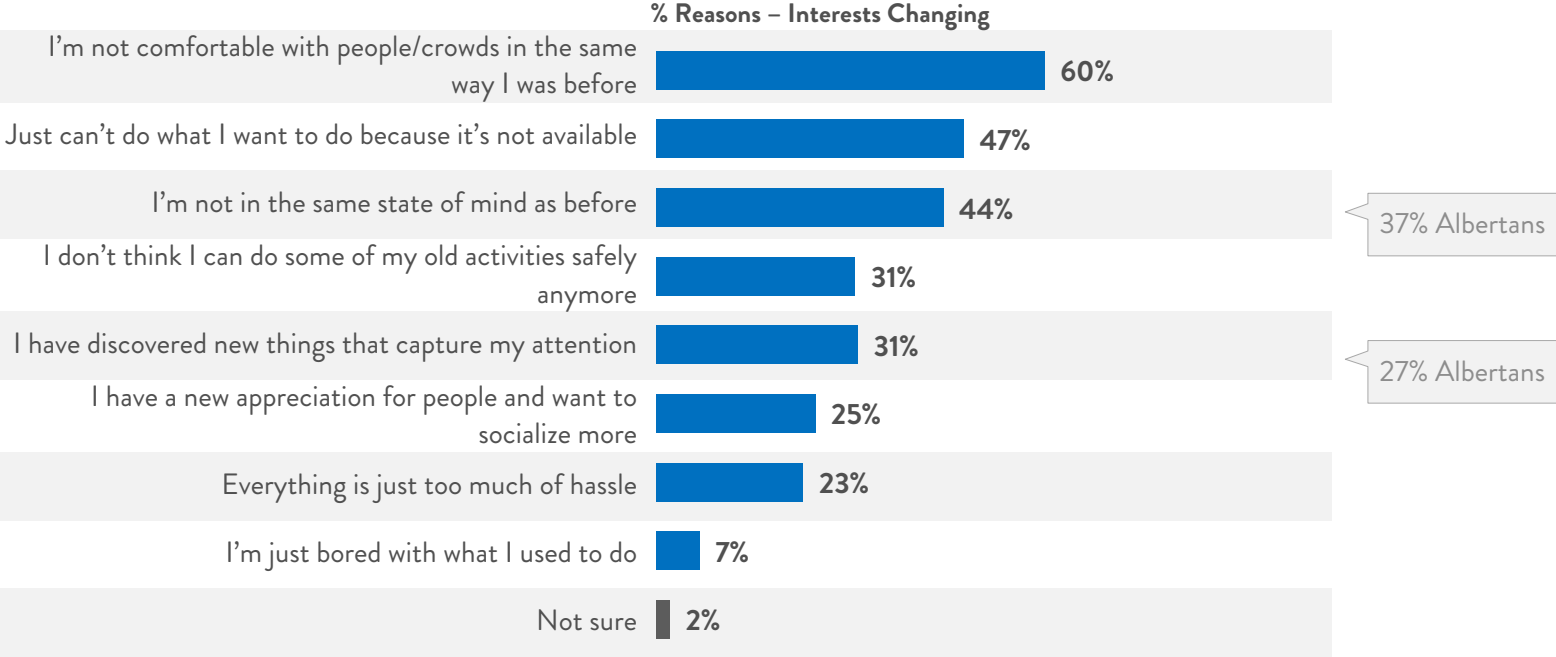
A person with blonde hair, wearing a black tank top and leggings, stands on a rocky path in a grassy field. They are looking towards a suspension bridge in the distance. The background is filled with trees and a cloudy sky. The overall mood is contemplative and serene.

Edmontonians are shifted habits more than interests but they are also discovering new things to do at a higher rate than the rest of the province.



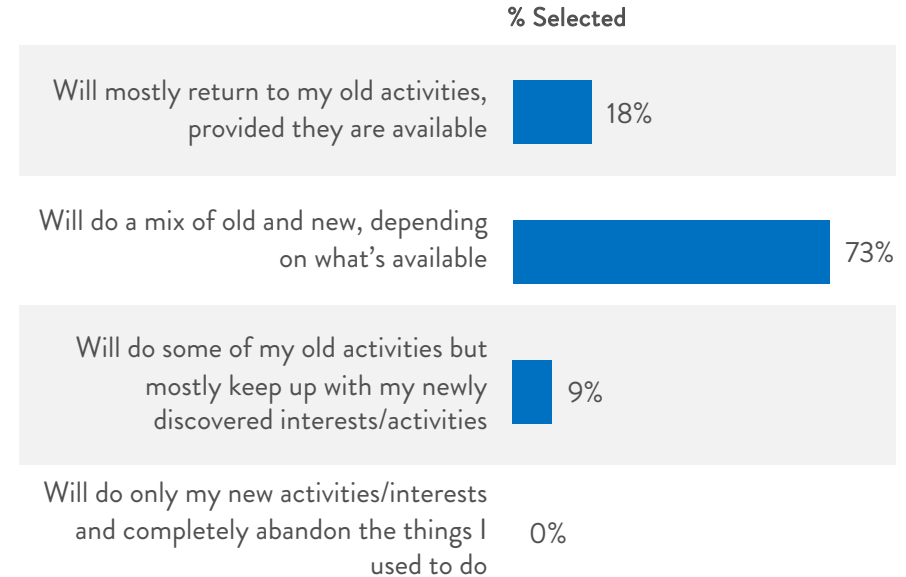
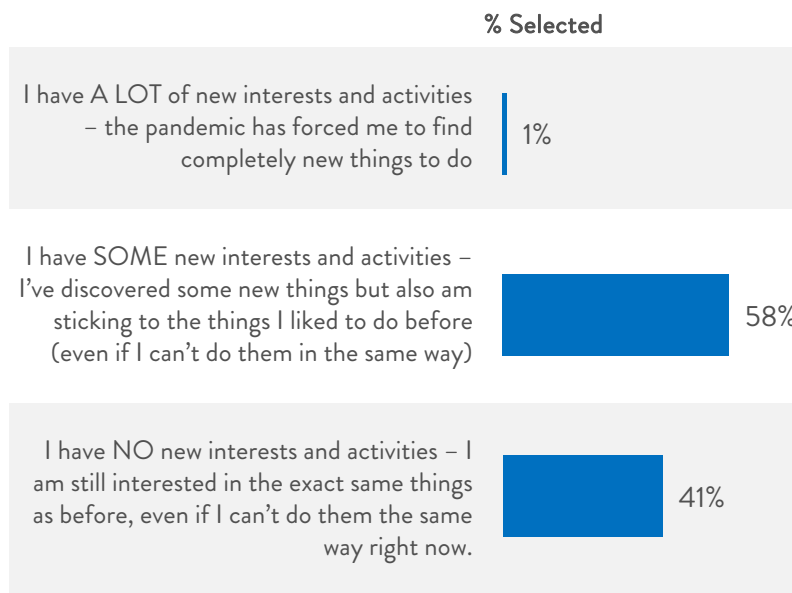
Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.
Base: Edmonton (n=499)

Edmontonians are more likely to cite their changing interests because of a change in state of mind



You mentioned what you are interested in doing has changed. Why is that?
Base: Interests changing (n=249)

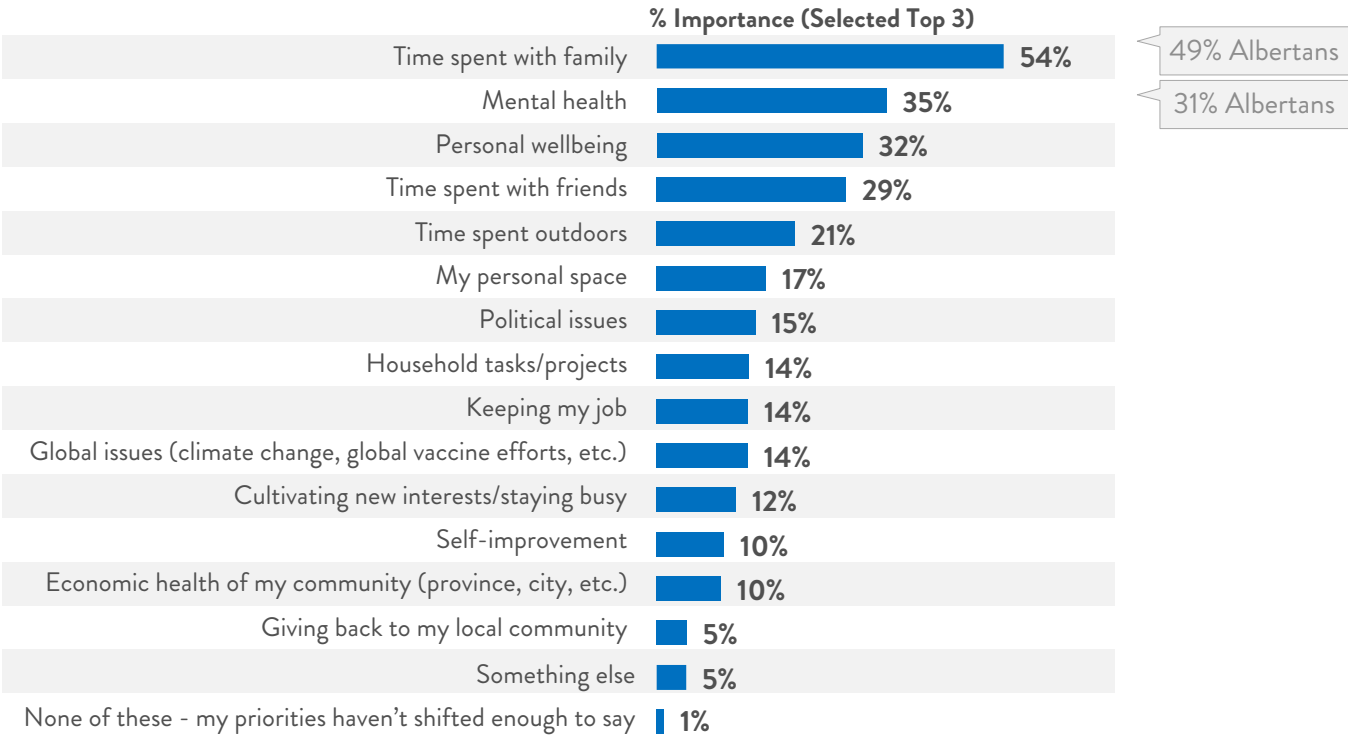
Most Edmontonians will still return to old activities but majority plan to incorporate newly discovered – it all depends on what is available



Which one of these statements best describes how you are approaching new interests and activities during this pandemic? *Base: Edmonton (n=499)*

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=297)*

Priorities for Edmontonians are heavily on family, followed by mental health

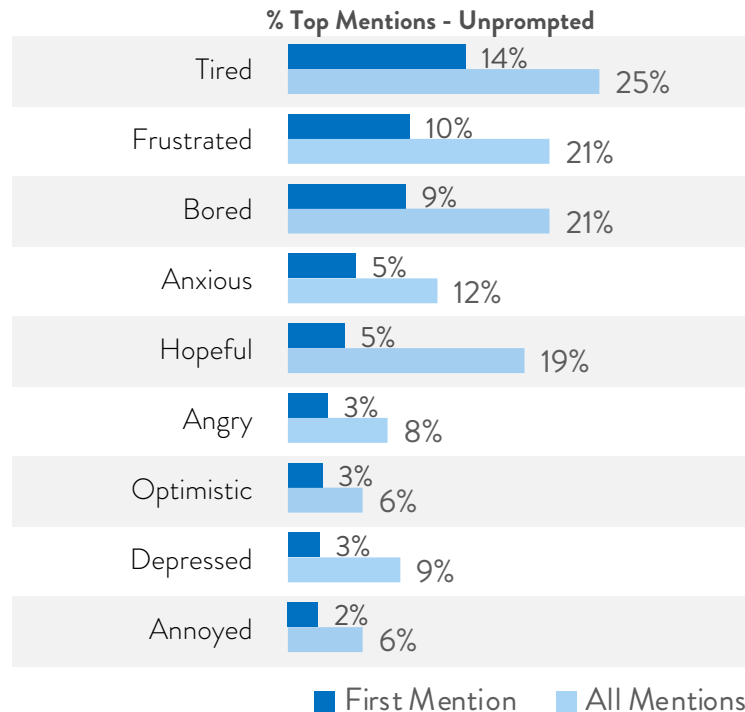


You said you find yourself re-prioritizing what is most important to you. What is more important to you now than it was this time last year, before the pandemic?
Please select up to three items *Base: Re-prioritizing (n=341)*

How are attitudes and emotions impacting behaviours?



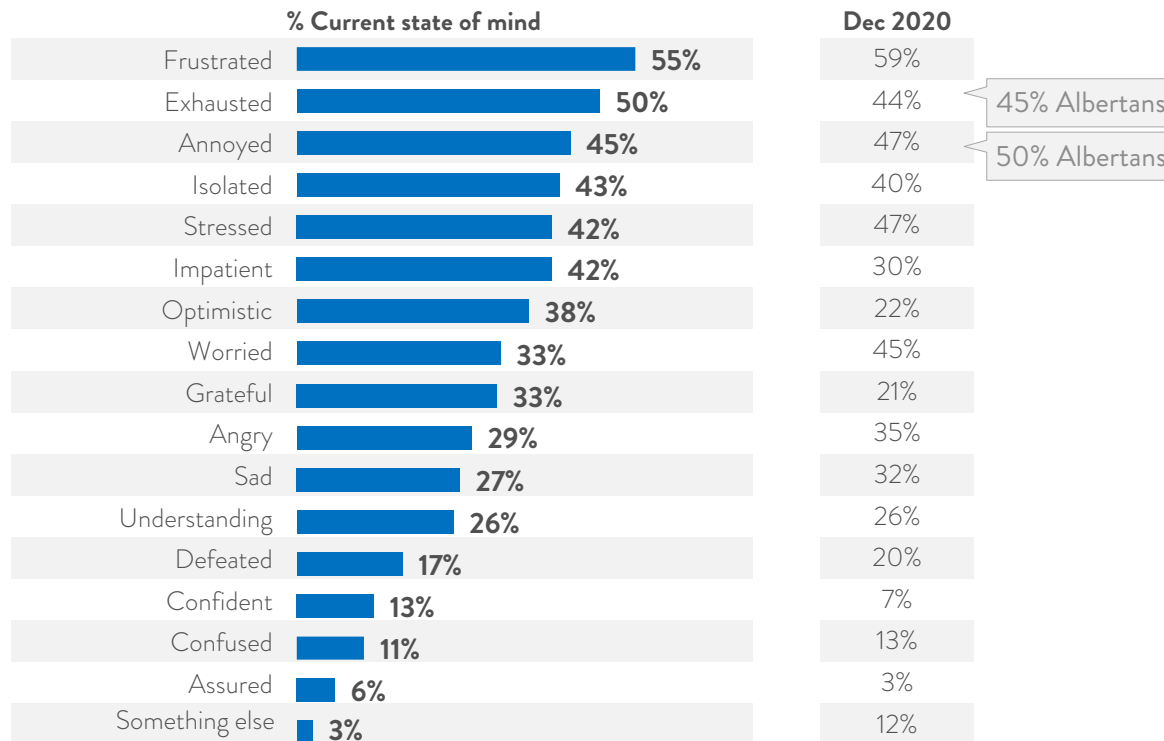
Unprompted, Edmontonians are primarily feeling tired and frustrated.



What else?

Lonely
Happy
Impatient
Stressed
Isolated
Worried
Content
Sad
Calm
Grateful
Exited
Restless

Edmontonians are showing more exhaustion than the rest of the province but have increased their optimism

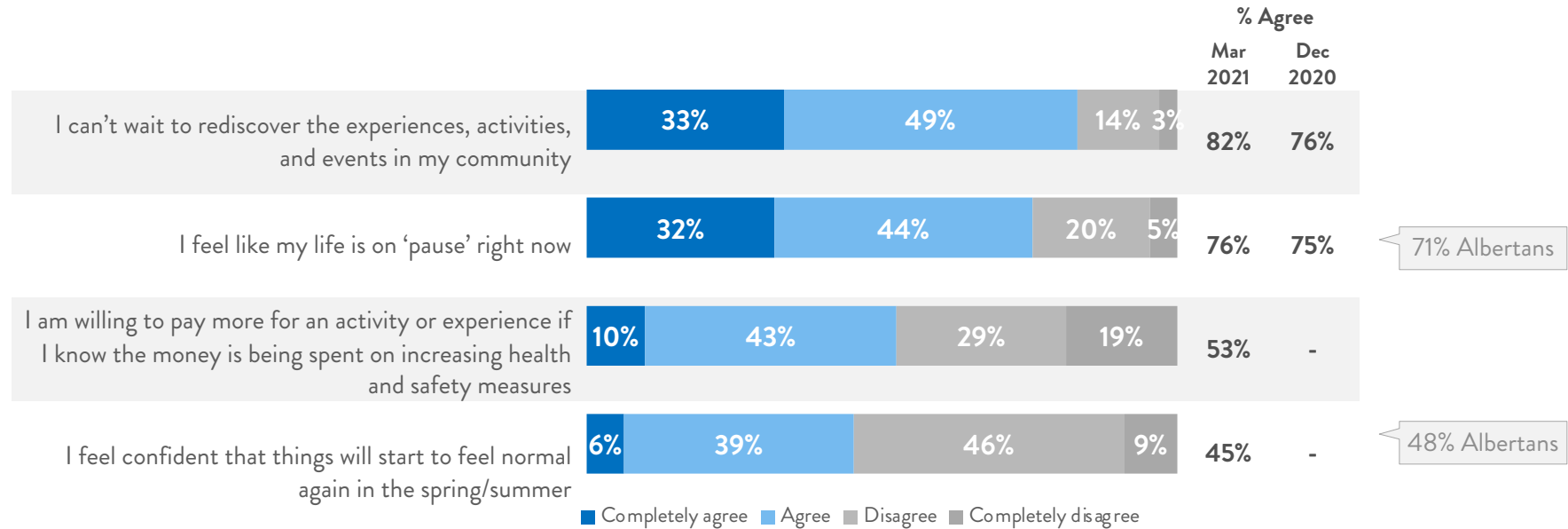


As the pandemic progresses things change – case numbers go up and down, protocols become more strict or less. What words best describe how you are feeling right now?

Please select all that apply.

Base: Edmonton (n=499)

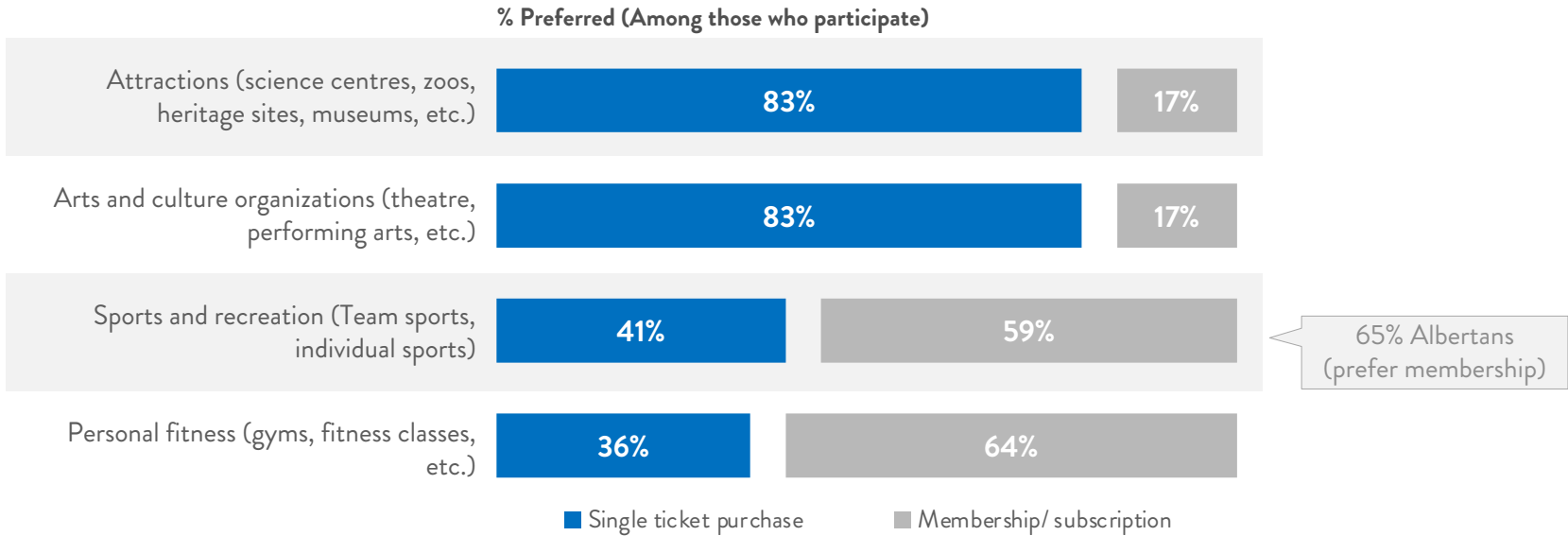
And the desire to rediscover is only growing, though uncertainty around when we will feel “normal” is still evident



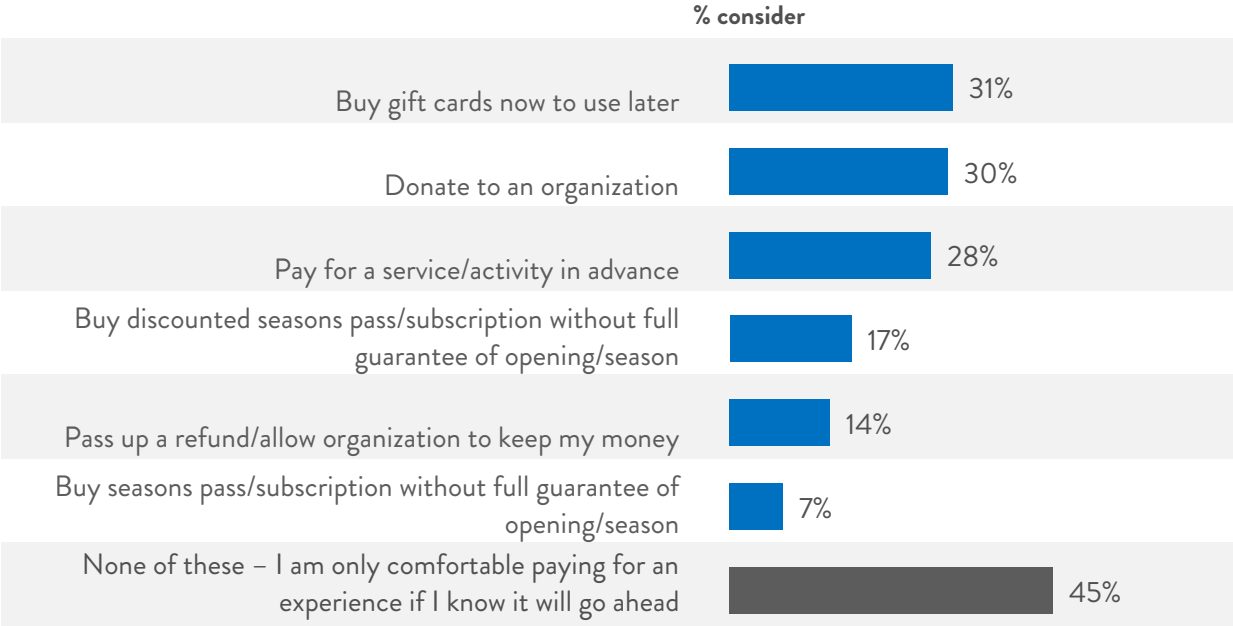
Opportunities for financial support



In Edmonton, participants are slightly more likely to prefer single entry options for sports and rec (compared to rest of province, not overall where the trend for this category is still membership based)

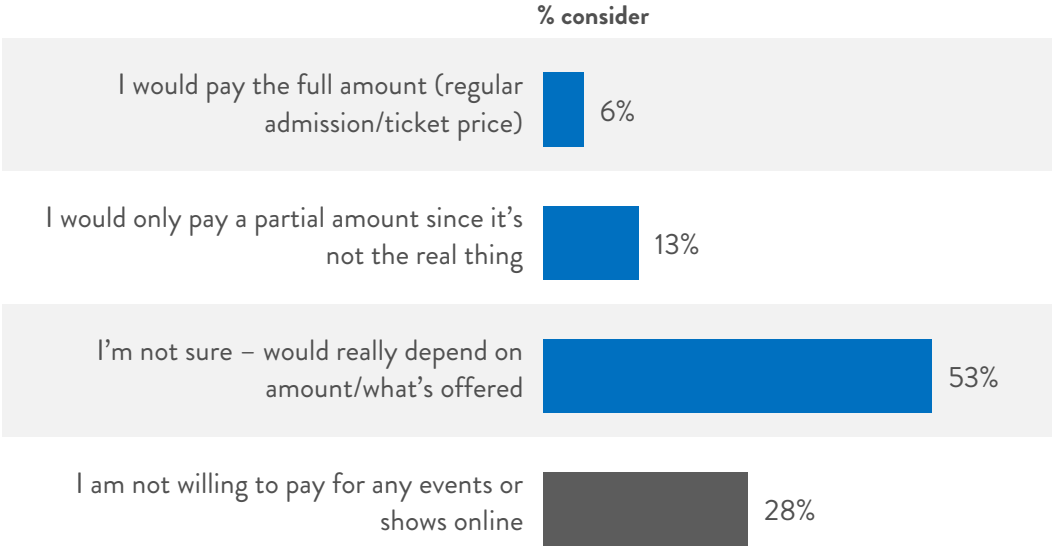


But Edmontonians still desire the same flexibility in support options as the rest of Albertans



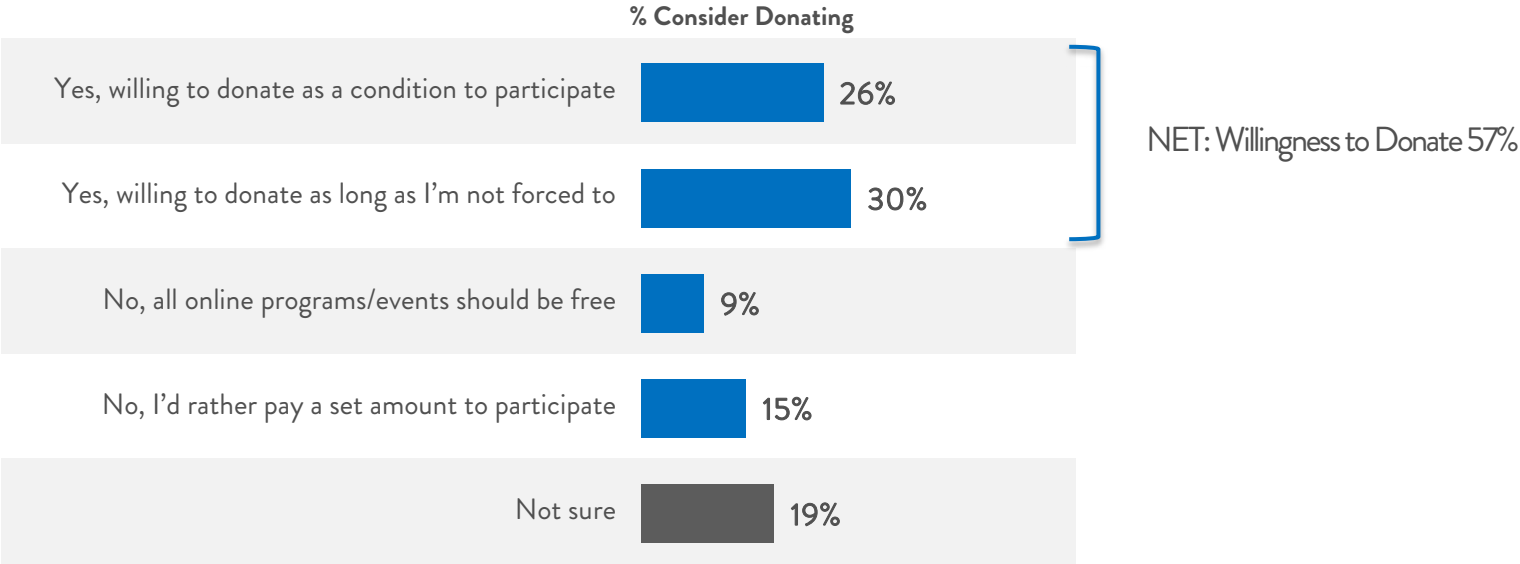
Right now, there is a real challenge for organizations and businesses who are trying to offer experiences in limited form but also remain financially viable. Which of the following would you consider doing to support organizations? Please select all that apply. Base: Edmonton (n=499)

And few Edmontonians are willing to pay a full amount for online offerings and events



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: Edmonton (n=499)*

Over half of Edmontonians are willing to donate as a condition to participate in an online event



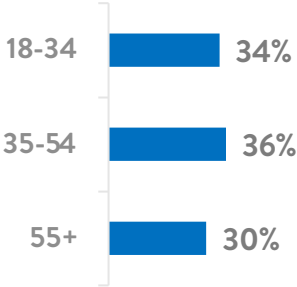
If you weren't forced to pay but could donate any amount you wanted, would you be willing to donate instead?
Base: Edmonton (n=499)

Respondent Profile

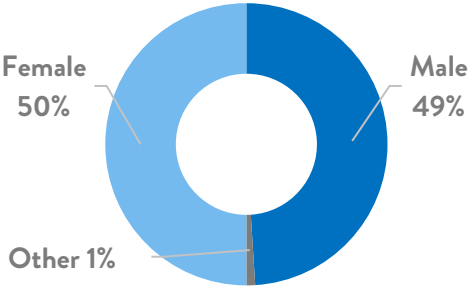


Who We Heard From (Edmonton)

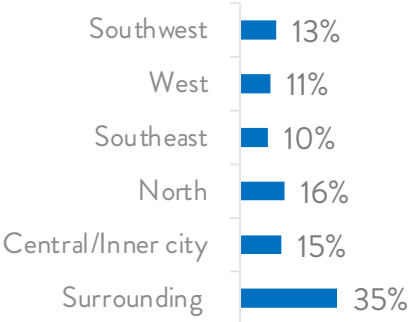
Age



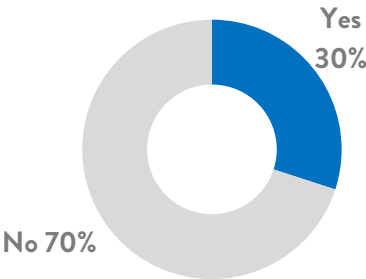
Gender



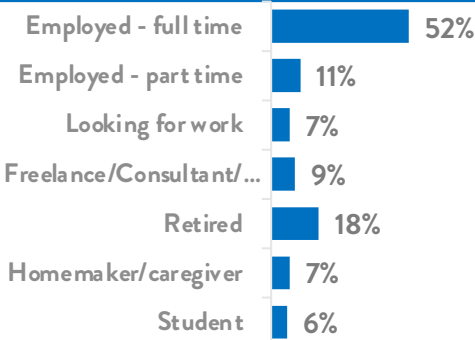
Location



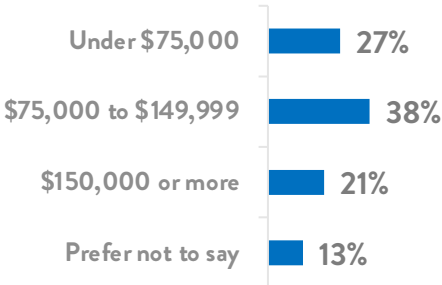
Children in the Household



Employment

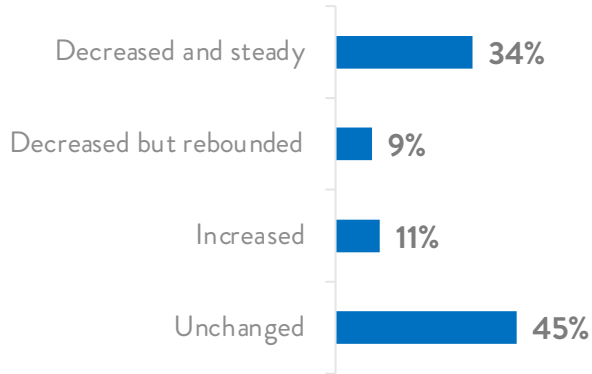


Household Income

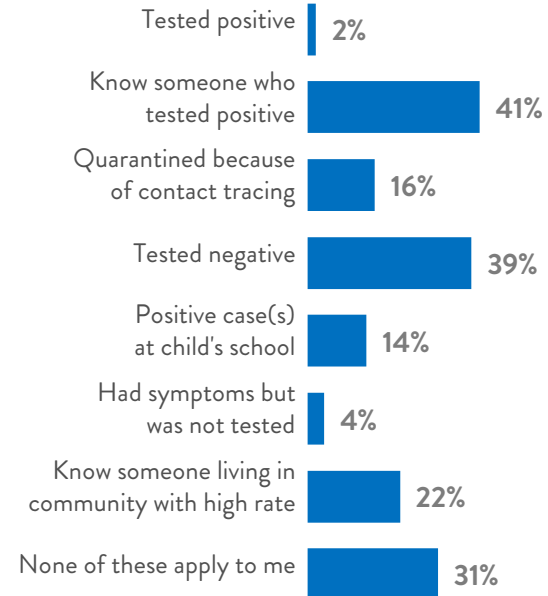


Who We Heard From (Calgary)

Income Changes (COVID)



Connection to COVID



**Stone —
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Understanding people. It's what we do.