



**calgaryarts**  
development

# The NEW Experience Economy:

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

Research Outcomes: Wave 1 Results

June 2020

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# Thank you.

This initiative is being funded by leaders who see an opportunity to support organizations which bring remarkable experiences to life in communities across Alberta. **We thank them for their generous support.**



# It starts here.

For more information please visit: [www.stone-olafson.com/thenewexperienceconomy](http://www.stone-olafson.com/thenewexperienceconomy)

These are the most unusual of circumstances. We understand the uncertainty because we see it too. This research aims to arm you with facts and insights to fuel your recovery.

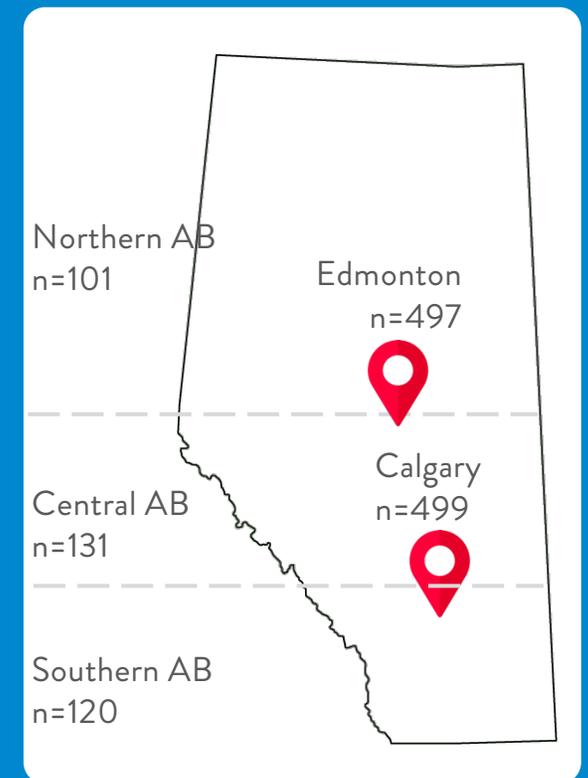
You can use the data to plan new experiences, develop marketing and promotions, work on engagement over the long term and much more.

- ✓ Alberta-wide report: Macro perspective on our province
- ✓ Calgary and Edmonton Booster reports: More details on these large urban markets
- ✓ Detailed data: If you want to cut in on data.
- ✓ Support: If you have questions contact us – we are here to help.

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# Understanding the Research Process:

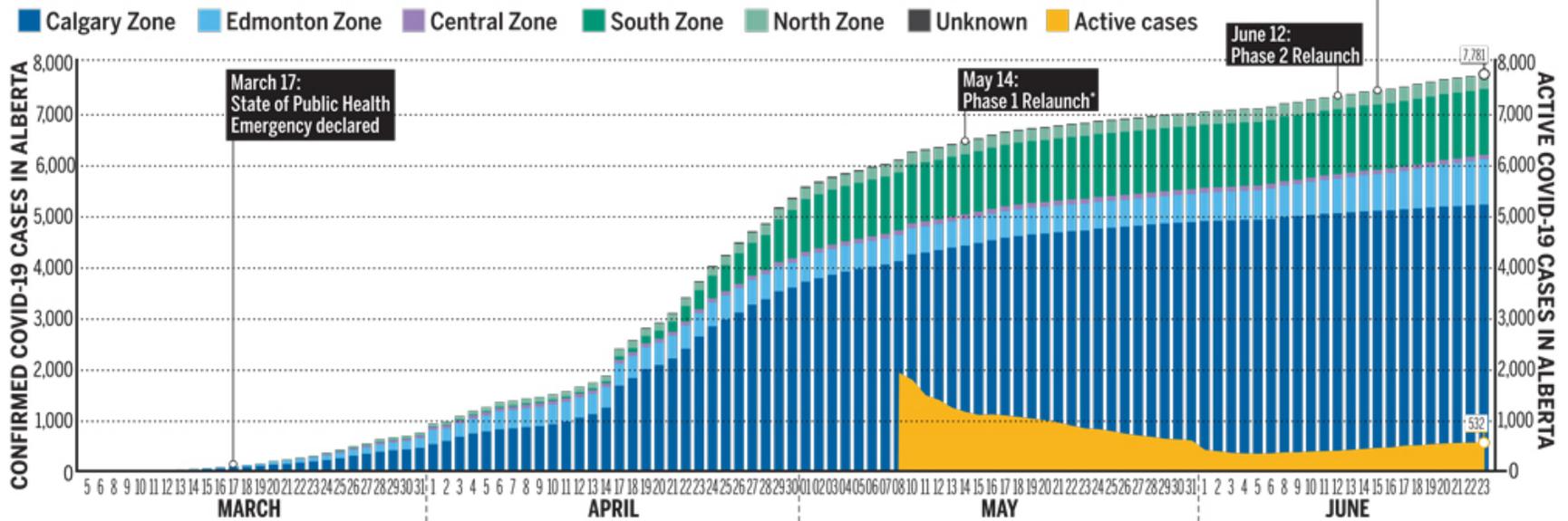
- Online survey of n=1,348 Albertans. Booster samples in Edmonton and Calgary.
- Fielding for wave 1: May 21<sup>st</sup> to June 2<sup>nd</sup>
- Respondents were recruited through consumer panels, in partnership with Angus Reid Forum.
- Overall sample was balanced by region with additional statistical weighting to ensure representative of age and gender for each region.



# Context matters!

## COVID-19 CASES IN ALBERTA

There are now 7,096 recovered COVID-19 cases and 153 deaths in the province. As of June 23, 2020.



Note: March 7; April 15, 16; May 9; June 7 data not properly available. \*Some sectors in Calgary and Brooks were not allowed to reopen until May 25.

SOURCE: ALBERTA HEALTH SERVICES

LORI WAUGHTAL / POSTMEDIA NEWS

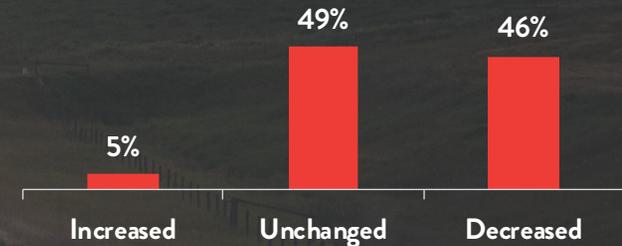
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# The economic backdrop to the COVID-19 crisis in Alberta is jarring

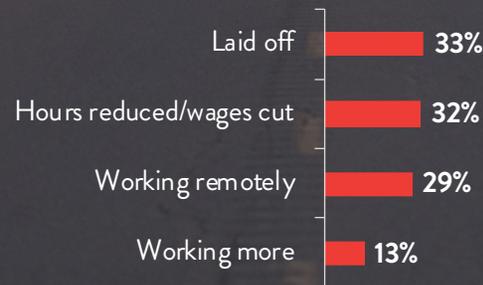
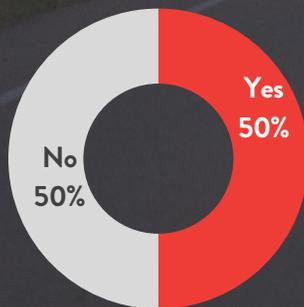
These are unique circumstances in Alberta – unlike other regions, a two-front crisis has been occurring involving the Pandemic on one side and an historic crash in energy prices on the other:

- 46% have already experienced a decrease in income
- Among those with work reductions, 73% cite COVID, 22% oil prices

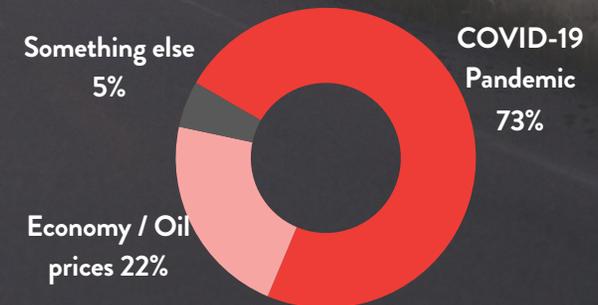
## Has your income changed?



## Has employment changed since COVID-19?



## Reasons for lay-off/wage cut



A large crowd of people is gathered on a city street, likely for a marathon or race. The street is lined with multi-story buildings. In the foreground, a person is wearing a grey t-shirt with the text "St. Jude Children's Research Hospital" and "FUNDRAISING FOR THE KIDS OF" visible. Another person is holding up a smartphone to take a photo. A sign for "KOOKY CANUCK" is visible on a building to the left. The overall scene is a busy, urban environment during a public event.

# Understanding Behaviours and Motivations

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# How do Albertans engage with the Experience Economy?



## OBSERVE

The spread of media and digital means audiences can participate in elements of the experience economy from a distance.



## ATTEND

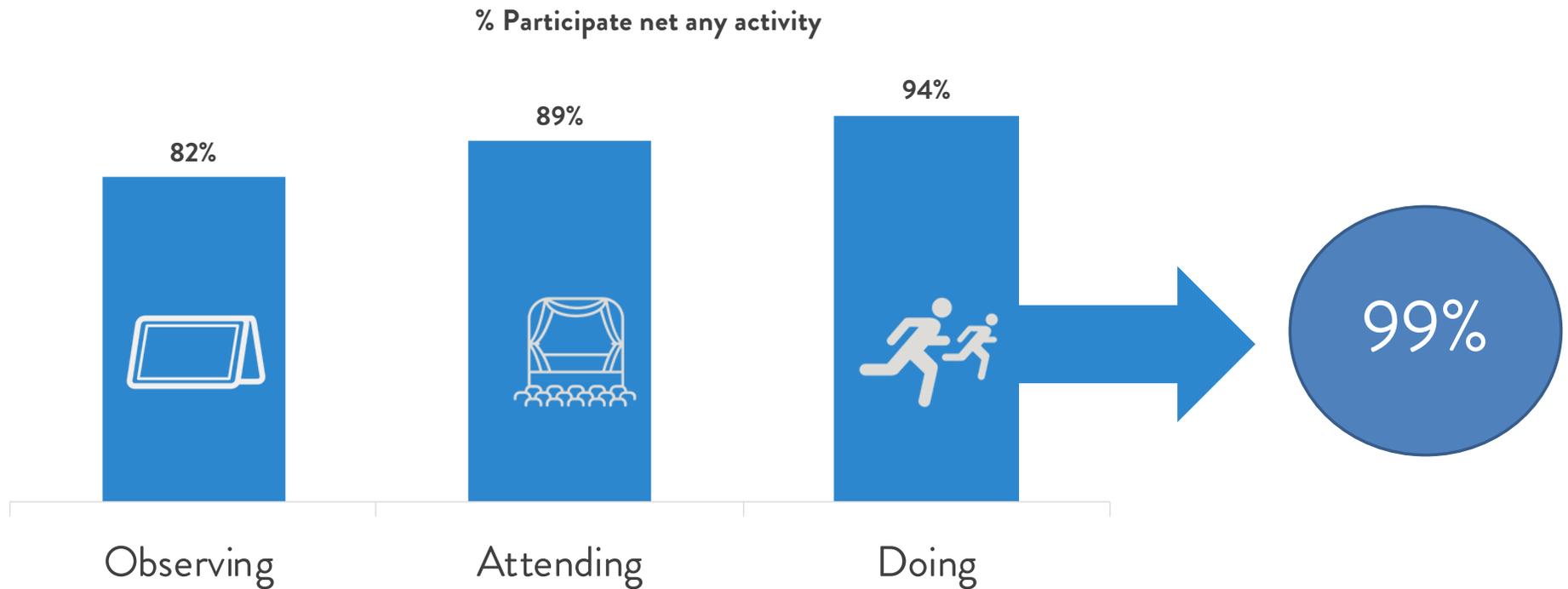
This category includes audiences who regularly attend events in-person across sectors – arts and culture, festivals, sports, recreation and other live events.



## DO

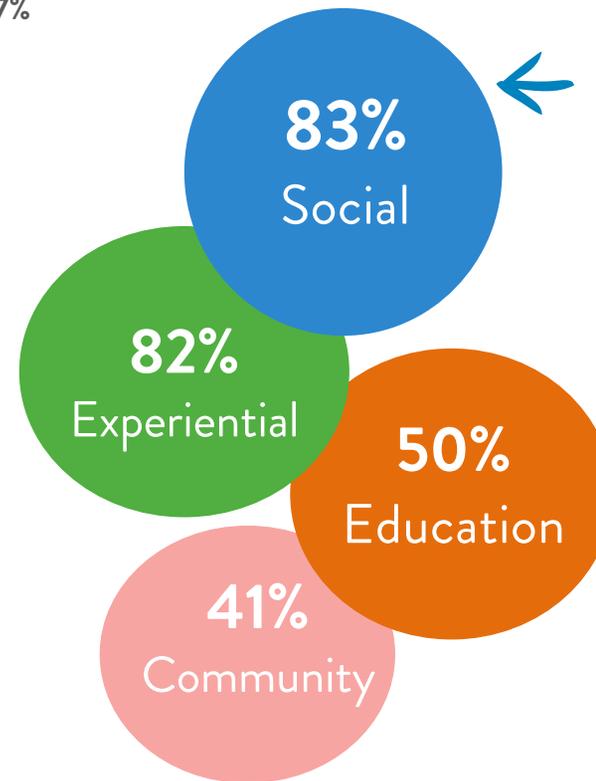
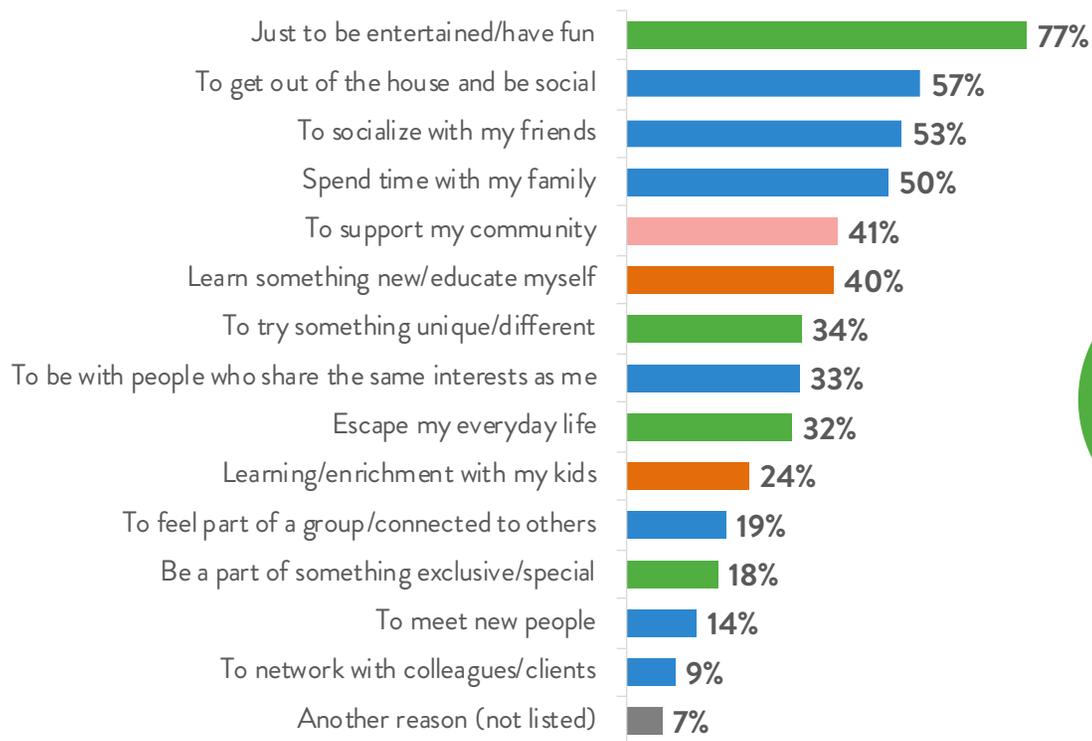
These are people who regularly participate through doing – whether it is participating in organized sports, taking art classes, performing, traveling or enjoying recreational opportunities within the province.

# To what degree did Albertans regularly engage prior to the COVID-19 Pandemic?



# What motivates Albertans to attend experience events?

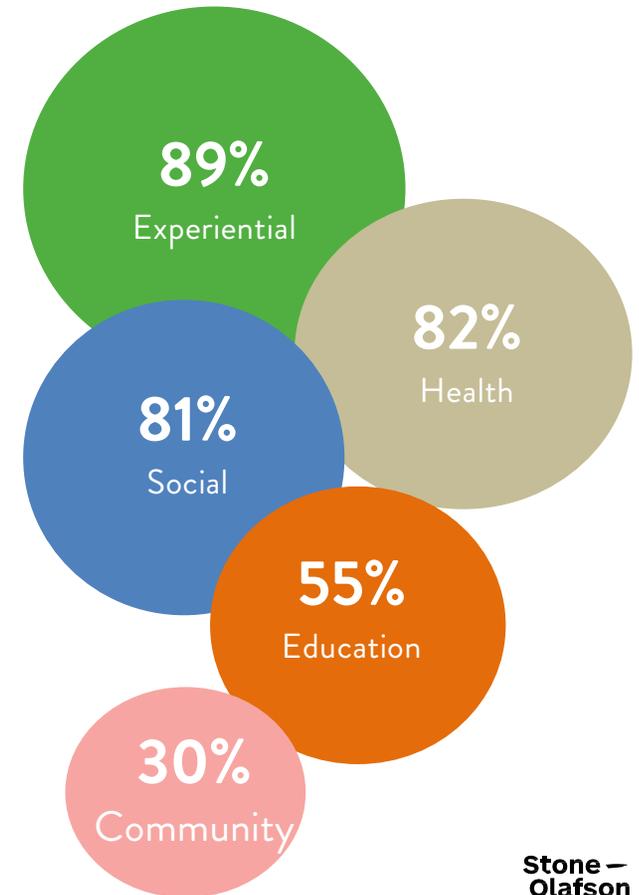
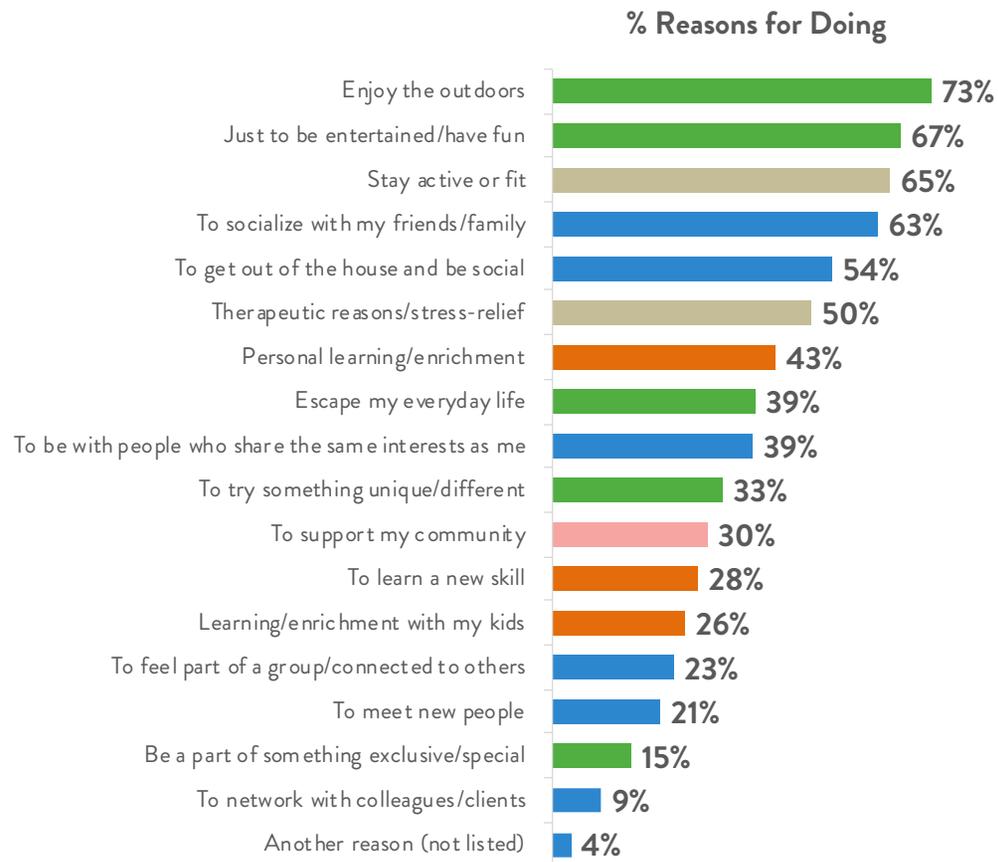
% Reasons for Attendance



Likely driving desires to reengage – but have to be tempered with comfort to actually do it.

Q10. Broadly speaking, what are some of the main reasons you attend these activities?  
Base: Main sample (n=1040)

## Motivations for doing are similar to attending.

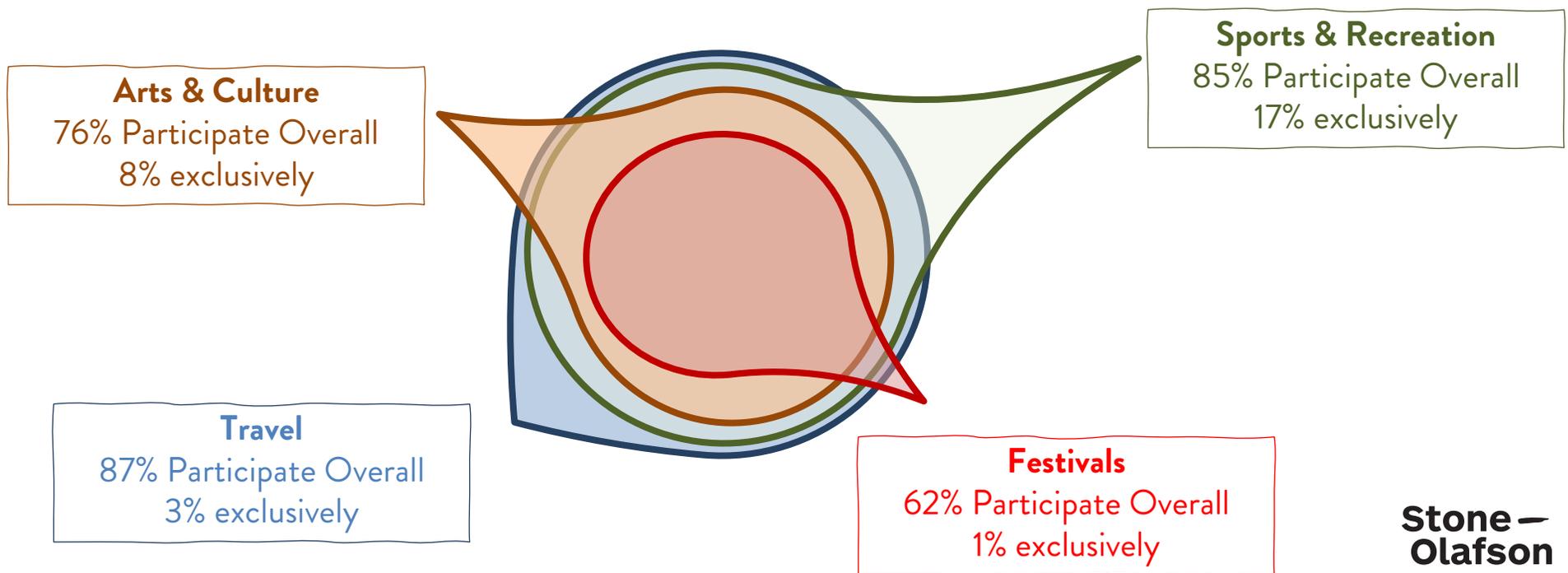


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Q12. Broadly, what are some of the main reasons that you chose to participate in these activities.  
Base: Main sample (n=1040)

# In pursuit of experiences

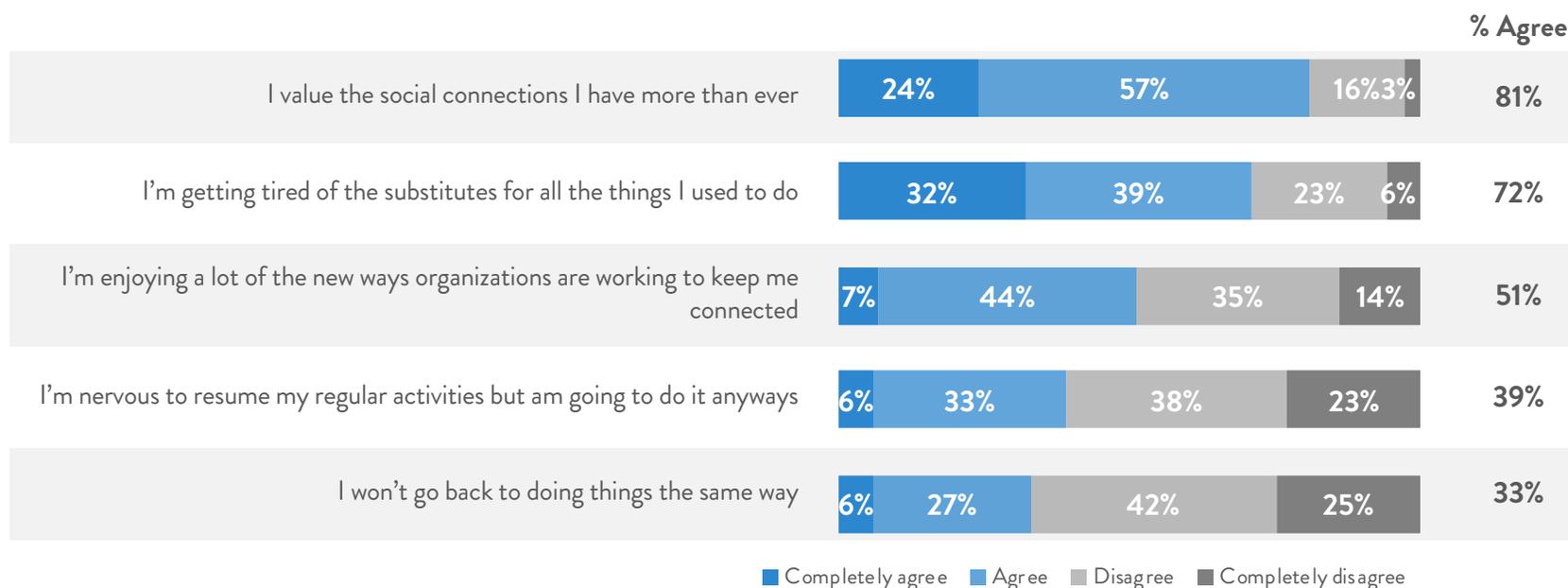
Albertans engage in experiences across multiple sectors – very few are dedicated fans of one area.





# Let's look at engagement and substitution activities

## With the strongest motivator removed for the past couple of months, Albertans are craving social connections – and showing fatigue of the substitutes

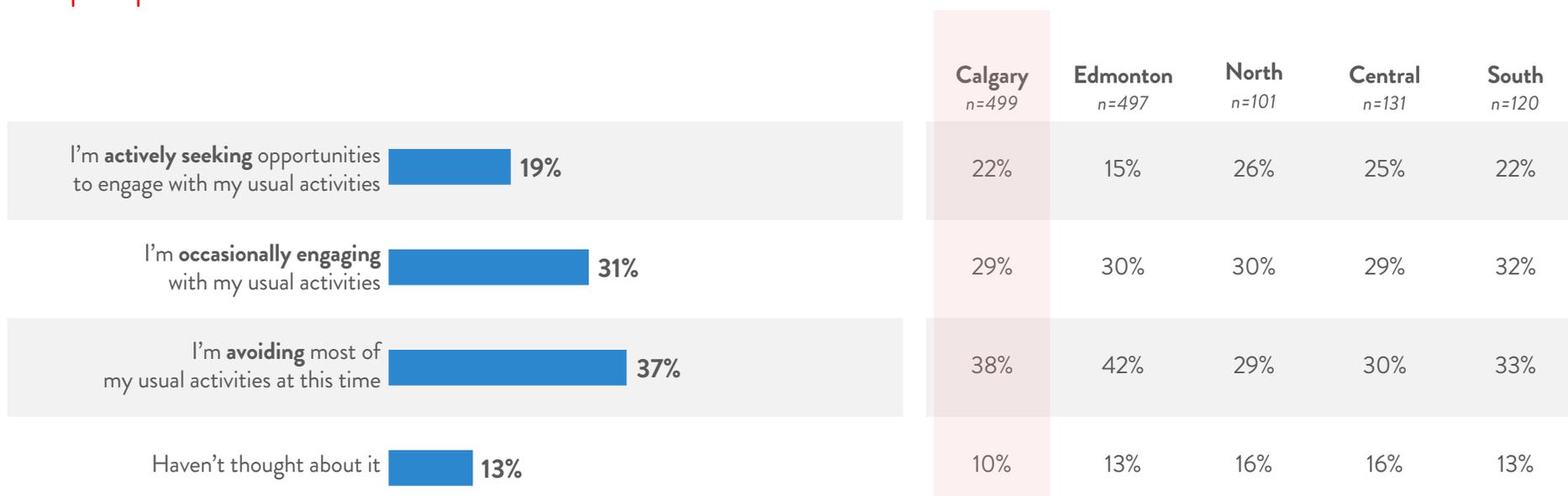


Q16. Now that we've asked you about the ways you have been connecting with organizations and activities throughout restrictions, we'd like to understand how you feel at this time. Please indicate your level of agreement with the following statements.

Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

## Half of Albertans have been actively or occasionally engaging in their usual activities through different channels

Among sector specific audiences, sports enthusiasts are more likely to actively seek out engagement (particularly exclusive sports participants) than arts & culture enthusiasts.



Q13. Since restrictions on gatherings in Alberta were implemented in mid-March, organizations have been trying to engage with audiences, primarily through digital channels. Which statement best describes how you are connecting with some of your normal activities?

Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

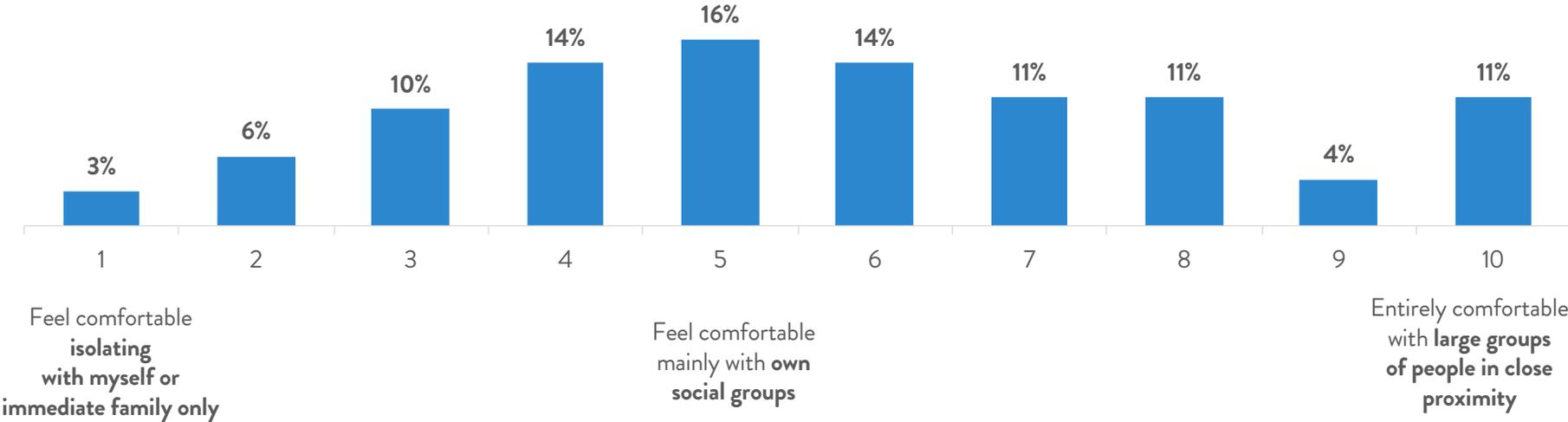
A photograph of two men in a gym setting. The man on the left is standing, wearing a dark t-shirt, light shorts, a black cap, glasses, and a white face mask. The man on the right is sitting on a wooden bench, wearing a black tank top, black shorts with blue stripes, black gloves, and a black face mask. A dumbbell is on the ground in front of him. The background shows a dark, slatted wall and a tree trunk on the right.

# How comfortable are Albertans?

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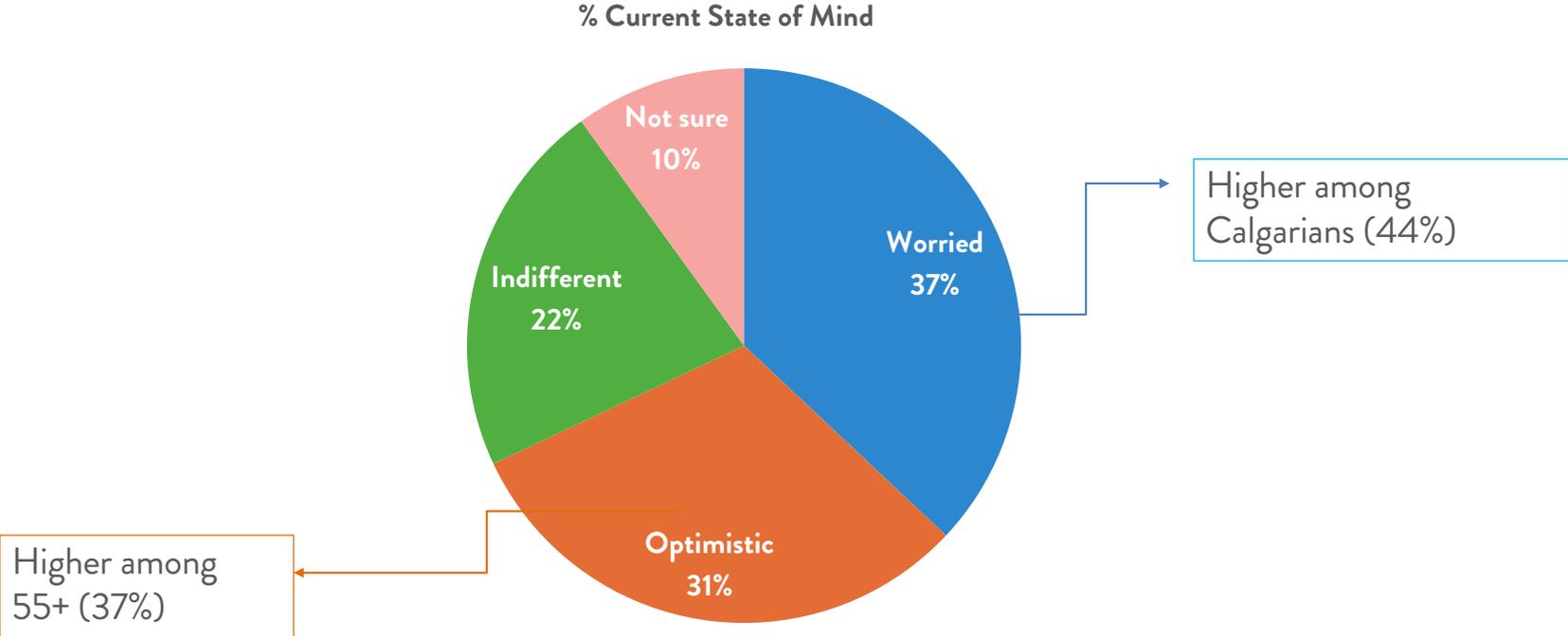
# Albertans don't appear ready for experiences with large groups.

% Comfort level – Interacting with Others



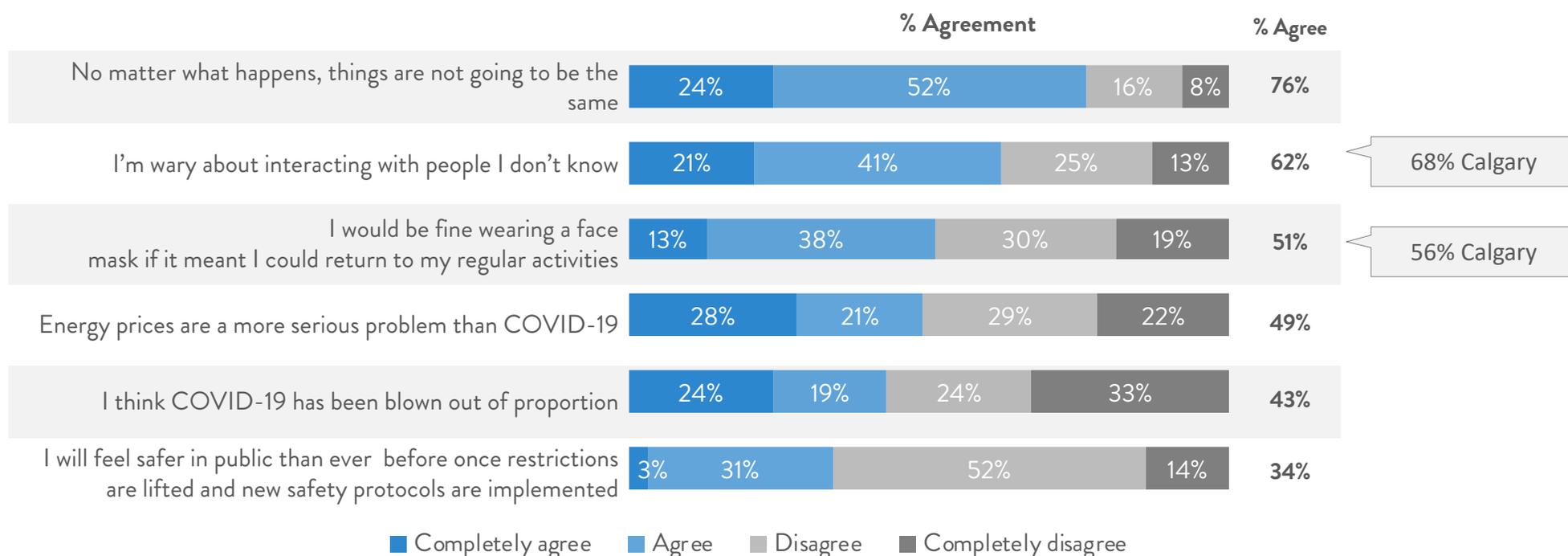
Q18. As Albertans start to re-connect with the community, everyone has a different comfort level in terms of interacting with others. Based on how you feel today, how comfortable are you with reintegrating or re-connecting with your community?  
Base: Main sample (n=1040).

# And while feelings are mixed, there remains a high level of worry permeating perceptions and anticipated behaviours



Q22. Given everything that is happening in Alberta, which of the following best describes how you are feeling today?  
Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample

## Perceptions demonstrate the complexity of the issues facing Albertans and organizations serving them



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Q20. Now that restrictions are starting to lift, we want to ask your opinion about the next couple months. Please indicate your level of agreement with the following statements.  
 Base: Main sample (n=1040).

## Attitudes are not universal – which is important as organizations consider re-engagement strategies



Women tend to be more wary of interactions and less likely to think this has been blown out of proportion.



Younger adults are more wary of large groups yet most comfortable with masks.



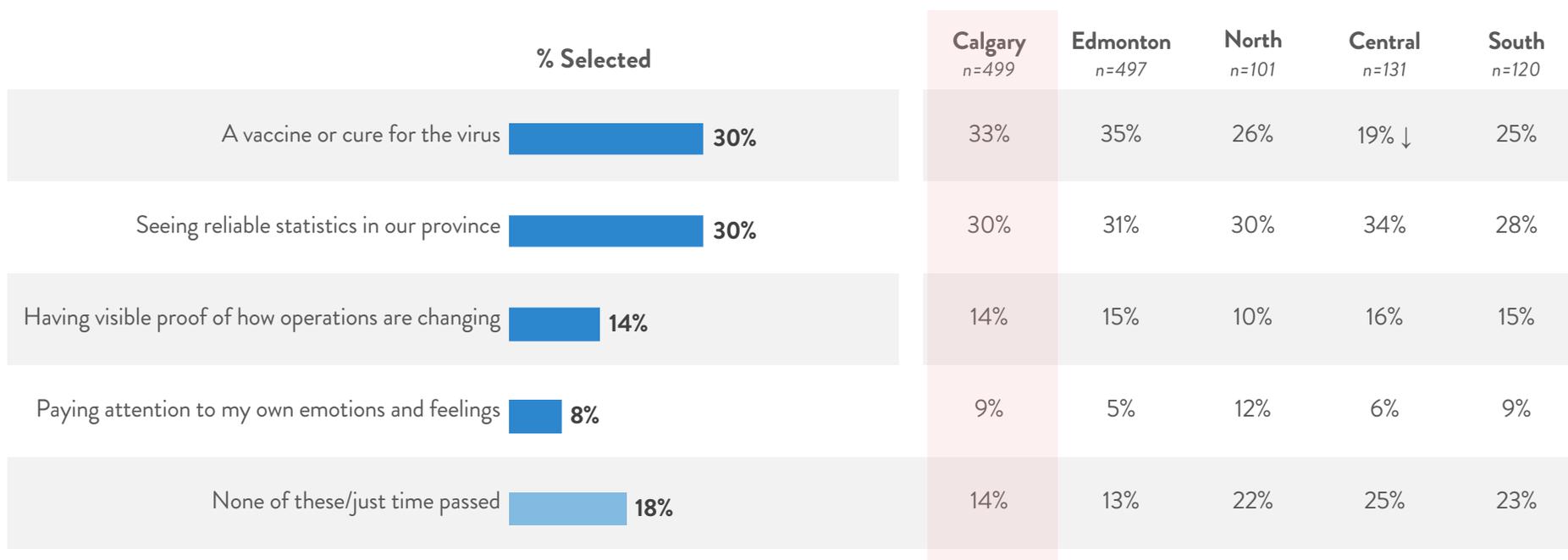
Urbanites more likely to see change, more wary of crowds, more comfortable with masks.



Arts & culture enthusiasts tend to be more wary of crowds, more comfortable with masks, less likely to think this has been blown out of proportion.

# What do Albertans need to increase comfort?

Statistics remain vitally important as an informational tool to help grow comfort but there is nearly a third of Albertans still looking for a cure/vaccine and another 18% who just need to evaluate over time.



Q19. Which is MOST important to you personally, in order to increase your comfort level with resuming your regular activities?  
 Base: Main sample (n=1040). Note: Calgary + Edmonton include supplemental sample



# What does this all mean?

Thought starters for recovery planning

## What did we learn:

**1.** The Experience Economy is massive, and sectors largely share an audience that actively pursues experiences.

### How might this apply to you?

- Think about how audiences are in pursuit of experiences, and not necessarily a particular sport or art form?
- What are the opportunities for experience organizations to collaborate?

## What did we learn:

**2.** Despite the crossover, arts and sports/rec audiences demonstrate some differences in attitudes.

### How might this apply to you?

- For arts and events: current enthusiasm levels may not immediately translate into in short term, despite what claimed intentions are. How should planning reflect this?
- For sports/rec: planning can ramp up more quickly. What considerations for planning are needed if future waves materialize and activities need to be scaled back again?

## What did we learn:

**3. Understanding intrinsic motivations is the key to re-connecting with audiences.**

### How might this apply to you?

- Understand the motivations for your event/activity and think about how organizations deliver these.
- Leverage motivations to build 'substitution' activities, to develop your ongoing engagement efforts and to direct your recovery planning:
  - To what degree can you facilitate the social connections people are craving now?
  - How do you deliver meaningful & authentic experiences now and post-pandemic?

## What did we learn:

**4.** Albertans are challenged to substitute experiences and fatigue is setting in.

### How might this apply to you?

- If motivations cannot be met, are substitutions more of a companion to the real thing?
- How do you leverage the unique advantages of virtual experiences and build around those to add value to audiences? Connect more deeply?

## What did we learn:

**5. Comfort levels will dictate re-engagement, more than interest, intention or past behaviours.**

### How might this apply to you?

- Some audiences are hesitant to re-engage. What is the need to adjust expectations on how attendance will rebound?
- Your messaging not only needs to calm the hesitation, but leverage motivations.
  - What safeguards are tablestakes?
  - How do you remind people they loved to come?

## What did we learn:

**6.** The overlap of economic concern is emerging and will only complicate planning over time.

### How might this apply to you?

- How will spending power of audiences be impacted over time because of economic uncertainty?
- How do you evaluate the following?
  - Pricing strategies that have a balance of value offers?
  - Promotional strategies that support that notion of value?
  - New expectations from consumers who are more value conscious, often with higher expectations?

## What did we learn:

**7.** A less optimistic outlook continues to exist.

### How might this apply to you?

- Organizations can appeal to audiences by tapping into unarticulated motivations that likely come with a market of this kind – escapism & comfort. Building and evolving experiences that tap into that may garner more attention/engagement than previously thought.



Thank you!  
Any questions?

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