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Building Experiences In The New Economy:

Spring 2022: Research Outcomes

May 3rd, 2022

Thank you to our generous supporters.

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.**

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Purpose & Approach

Since 2020, the COVID-19 pandemic has dramatically reshaped how audiences engage with the experience economy across different sectors and forced leaders to grapple with everything COVID-related, overcome emotional barriers like comfort and deal with risk tolerances simply to engage their audiences. Starting in 2020, a province-wide research study was made available to support decision makers with timely and relevant data. This work builds on those efforts and will allow leaders to have continued access to data to fuel recovery and to inform efforts to rebuild experiences in the ways that align with changing audience expectations and needs.

Key areas of exploration for Spring 2022:

- Track key attitudes and perceptions that influence consumer mindsets
- Understand overall willingness to engage with activities now that restrictions have largely lifted (including expectations and barriers)
- Identify messages and approaches for re-engaging audiences with experiences in the community

Research Approach:

A total of n=1000 surveys in Edmonton and Calgary :

- n=500 in each market, representative by age and gender in each city.
- Approximate margin error for a typical sample size of 500 is +/- 4.4% *(not typically applicable for online non-probability samples)*
- Survey was fielded: March 23rd – April 1st, 2022

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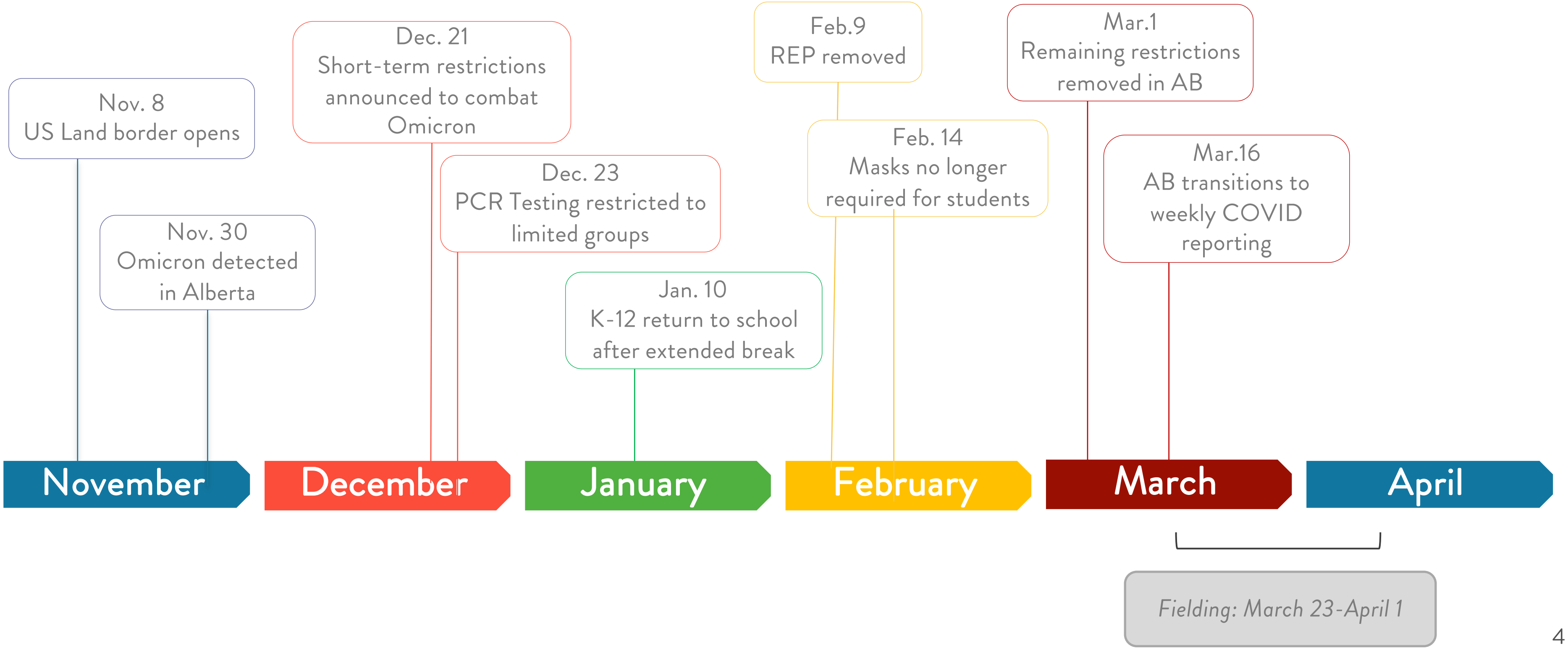
Mapping the progression of COVID-19 milestones in Alberta



Context (still) matters

- The Alberta government began limited PCR testing for COVID on December 23 to high-risk individual and employees in certain fields only. As such, it is estimated that true case counts (which have been key in driving and understanding risk and comfort) are much higher than reported.
- That said, hospitalization rates and wastewater samples have provided Albertans some indicators of current trends.
- Regardless, the less severe nature of the latest variant (Omicron) combined with the relaxation of most public health measures means Albertans are beginning to engage in activities in a manner not possible since the start of the pandemic.
- At the same time, however, economic conditions are evolving to create new pressures that may impact consumer behaviours; most notably inflation. As the cost-of-living climbs, consumer spending power, combined with ongoing employment shifts, is curtailed and may be impacting how consumers are engaging with experiences.
- Still, behaviours have shifted so dramatically over the past 2 years that it has begun to re-shape expectations and habits in new ways. As such, the context of our environment remains critically important to understand how Albertans are reacting and re-engaging (if at all).

Key Numbers in Alberta
(as of April 25)

- 565,052 Total cases
- 6,569 Cases reported/7 days
- 8,698,772 Vaccine doses
- 1,220 In hospital
- 47 In ICU
- 4,252 Deaths

Key Take-aways and Considerations

We are still a non-committal audience

Despite the removal of restrictions and the return to activities for many organizations, audiences are still grappling with the lingering impacts of covid the past two years, and the mental and emotional impact of this. While optimism is starting to poke through, the dominant emotions remain primarily negative and reflect a longer-term fatigue – exhausted and stressed. As well, messaging in our province is encouraging Albertans to move on but many people are experiencing or know others who have covid at higher rates than ever before. As such, there is a lingering hesitation that is subconsciously impacting our habits and our patterns.

And while many activities have returned in full, audiences are still returning or engaging at different rates. Among the top activities that still lag in participation are travel and specific indoor activities . While many of the reasons for this are comfort, the financial component cannot be overlooked. What this means is ultimately organizations have to still prepare for a hesitant or non-committal audience.

And not all activities are created equal

It is important for organizations to resist confusing the yearning and pent-up interest that audiences have expressed with true pent-out demand/intent. Essentially, not all events/activities are created equal. Some activities are selling out because the audience is more primed (higher comfort but also financial capacity, etc.) but as a result, not every organization has full access to the market.

The main reasons that audiences are still opting out or not fully resuming activities are either comfort-related or financially-related. Further, audiences are hesitant to commit to an activity because there are still concerns the activity will be cancelled or illness will force to miss. This reinforces the notion that organizations still have to prepare for the unexpected but also highlights that flexibility is key: flexible cancellation or refund policies still matter and will help alleviate concerns/hesitancy from audiences who are interested and financially able to commit but still nervous.

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Shared experiences, emotional escape and well-being remain key motivations

Both programmers and marketers looking to engage and attract audiences should consider the current environment and emerging motivations. Not surprisingly after two years of social restrictions, less access to experiences, negative media, and challenging economic conditions, audiences place a higher premium on fun, experiences that bring people together and those that foster their personal well-being. These, on their own, are not surprising and should be central to how programmers develop experiences and the campaigns marketers develop to engage the market.

Audiences also need to hear about benefits of involvement

Messaging still need to address the main barriers of engagement (cost and comfort) through value and safety messages. The third component to messaging should be information about the event or activity. However, messaging should not be equally weighted to these three areas. For many activities, participants want it to feel ”normal” again and safety messaging will be less potent. This is a case of knowing your specific audience and catering your messaging – as long as safety and value are considerations that you've built into your planning, you have flexibility on how to communicate that to your own audiences.

More compelling messaging could be around the benefits of your experience – this will remind audiences what the reasons they had for engaging in something in the first place (or for new audiences, fill a need). And communications should be very shareable, particularly since word of mouth and social influencers are some of the most commonly used sources to find out about activities.

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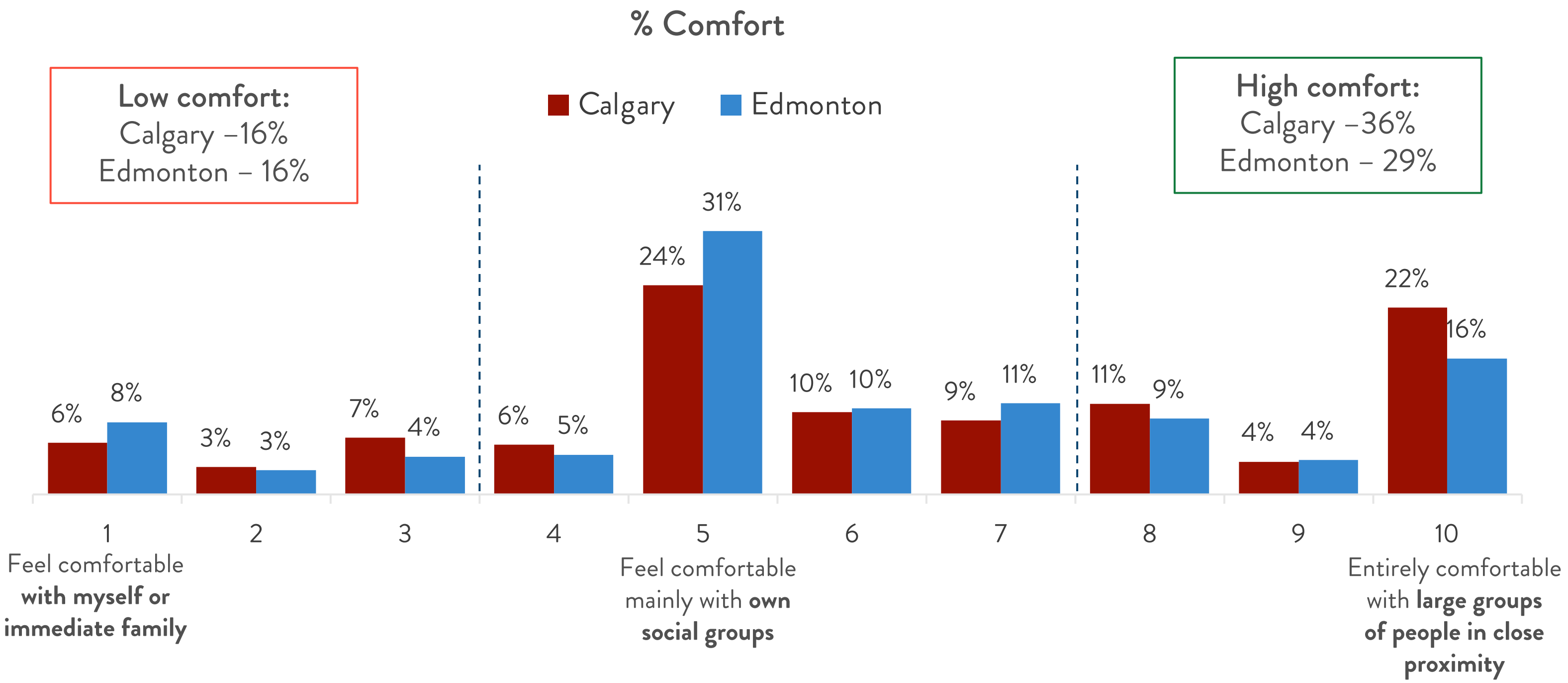
Recognize the change in buying habits

There is a clear shift in how audiences are finalizing their purchases to experiences. The trend that many identified pre-pandemic away from long-term commitments seems cemented now. In most day-to-day community experiences, audiences are less likely to commit long-term. Subscriptions or memberships are more difficult to sell mainly because they may be less flexible for consumers. As purchase behaviours evolve to favour more flexible options, organizations should consider ways to adapt with how to offer tickets/experiences and the frequency or commitment requirements.

Detailed Findings

Comfort levels and understanding consumer mindset

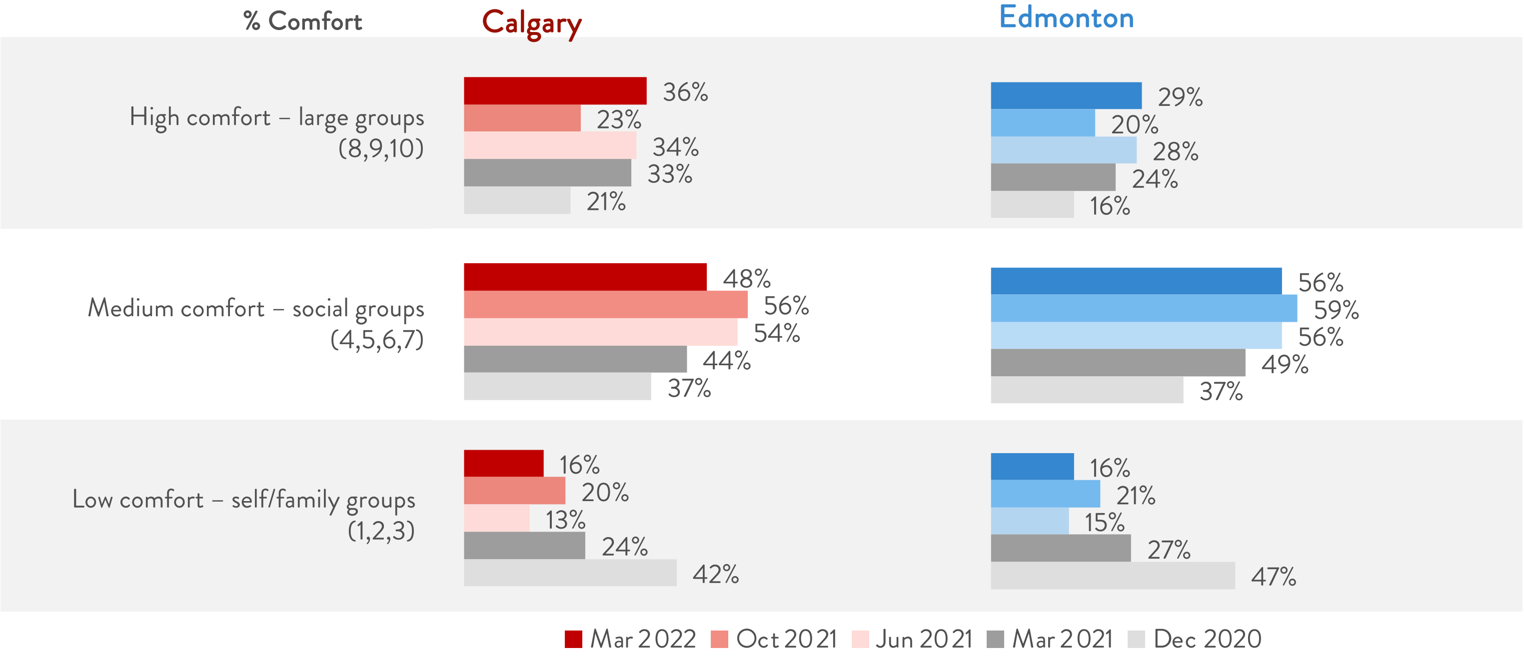
The majority of audiences have a medium to high comfort level; slightly higher in Calgary over Edmonton



Based on how you feel today, how comfortable are you with engaging with people and groups in your community?
Base: Edmonton (n=500), Calgary (n=500)

Although comfort has swung again considerably and is now higher than at any previous point in the pandemic

As restrictions have lifted and the province has moved away from the Omnicrom peak (wave 5), it is not surprising that comfort levels would once again swing in a higher direction, especially as warmer weather returns.



Based on how you feel today, how comfortable are you with engaging with people and groups in your community?

Base: Edmonton (n=500), Calgary (n=502)

And while consumers are showing less frustration, they are still stressed and exhausted

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While the frustration that was so prominent in the fall has been muted, this has been replaced with stress and exhaustion as Calgarians and Edmontonians continue to navigate the general removal of restrictions but also what that means for personal comfort going forward. There are some emerging positive emotions that coincide with this – growth in hope and optimism are encouraging.

Calgary

	Calgary	Oct '21	Jun '21
Exhausted	41%	50%	44%
Stressed	38%	45%	32%
Hopeful	38%	n/a	n/a
Frustrated	33%	68%	43%
Optimistic	32%	20%	44%
Worried	30%	41%	28%
Annoyed	25%	59%	34%
Nervous	25%	n/a	n/a
Grateful	23%	19%	22%
Happy	21%	n/a	n/a
Impatient	19%	37%	30%
Isolated	19%	22%	23%
Encouraged	17%	n/a	n/a
Angry	16%	40%	21%

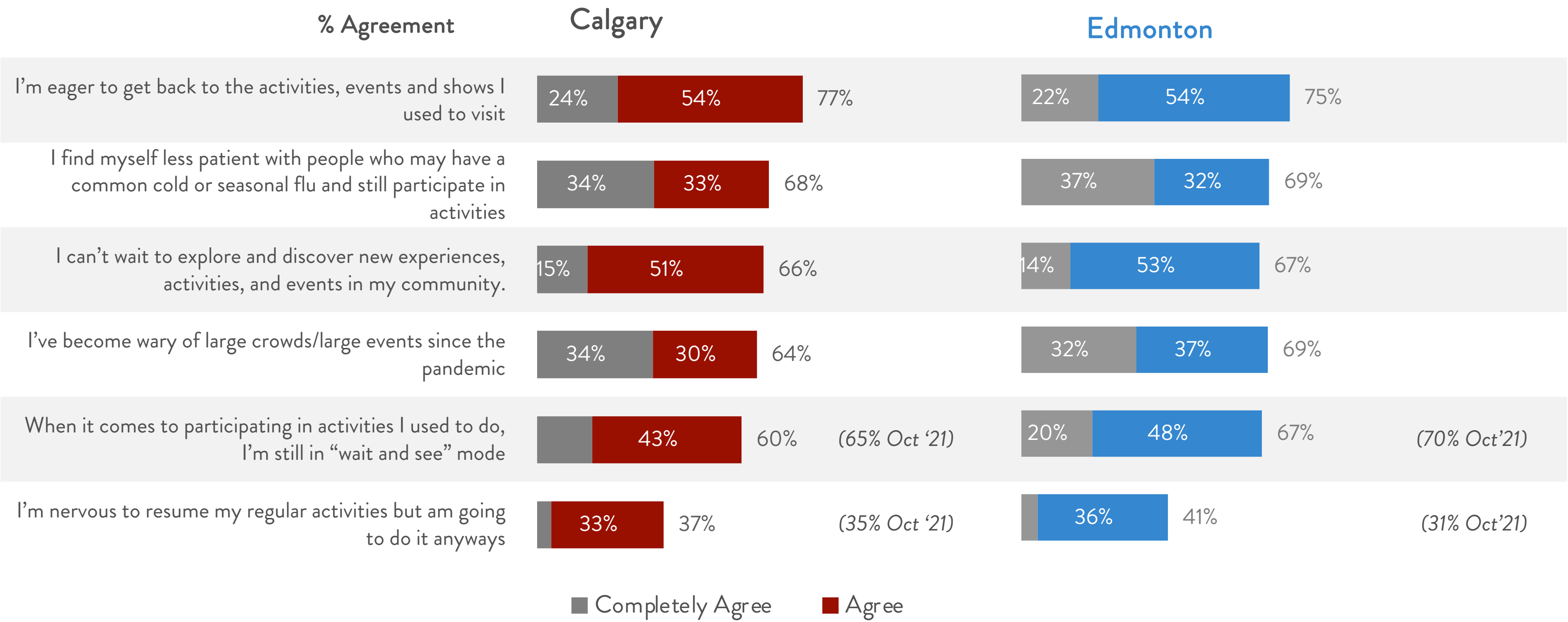
Edmonton

	Edmonton	Oct '21	Jun '21
Stressed	42%	45%	33%
Exhausted	41%	51%	42%
Hopeful	38%	n/a	n/a
Worried	36%	36%	36%
Frustrated	35%	66%	39%
Optimistic	34%	21%	45%
Annoyed	27%	55%	32%
Grateful	25%	18%	17%
Nervous	24%	n/a	n/a
Isolated	20%	27%	25%
Understanding	18%	9%	
Encouraged	16%	n/a	n/a
Sad	16%	22%	11%
Defeated	16%	20%	

What words describe how you might be feeling right now? Please select all that apply.
Base: Calgary (n=502), Edmonton (n=500)

Consumers are eager to return but remain cautious with their surroundings

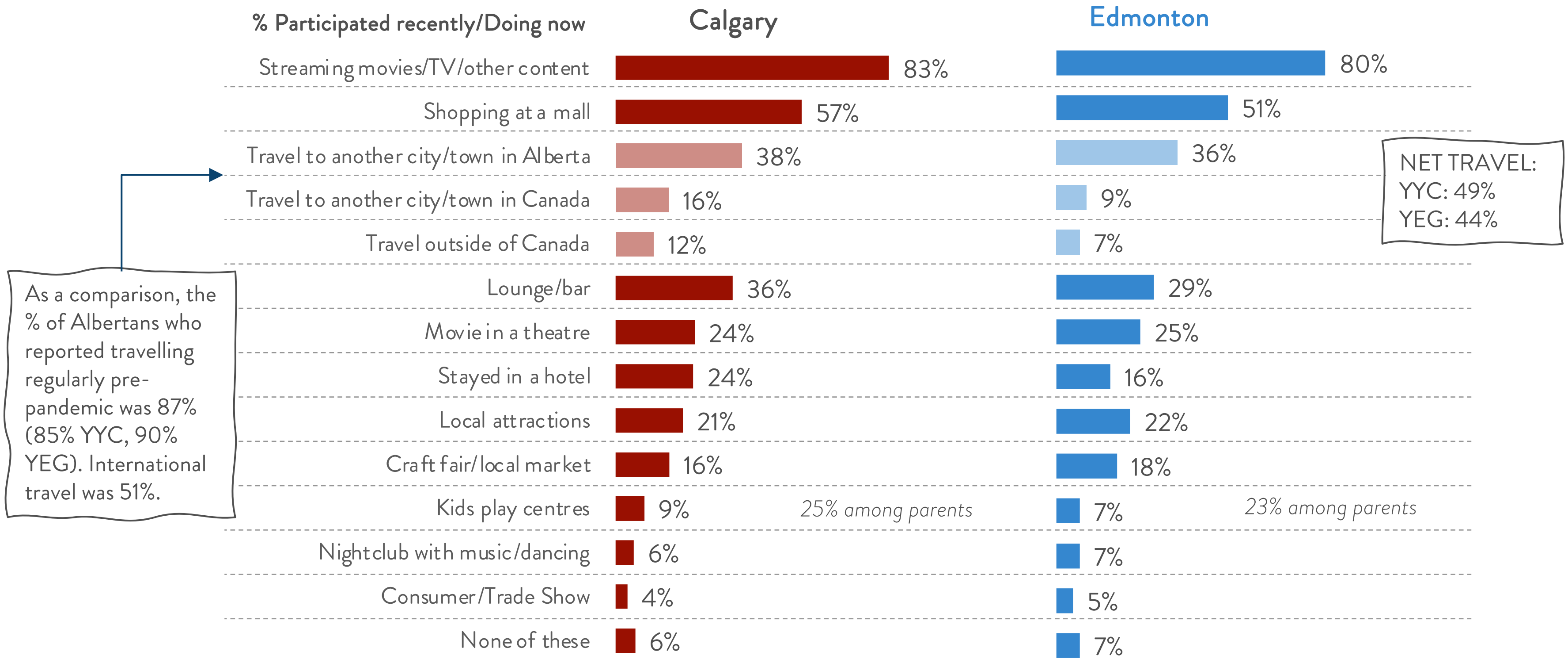
The eagerness to return to activities is clear but there are still significant portions of the population who are moving more slowly (either nervous or in "wait and see" mode). Crowds and patience with those who have common illnesses has moved the needle.



Below are a few things people might say about the current situation in Alberta. Please tell us if you agree or disagree with each one.
Base: Calgary (n=502), Edmonton (n=500)

Participation and Motivations

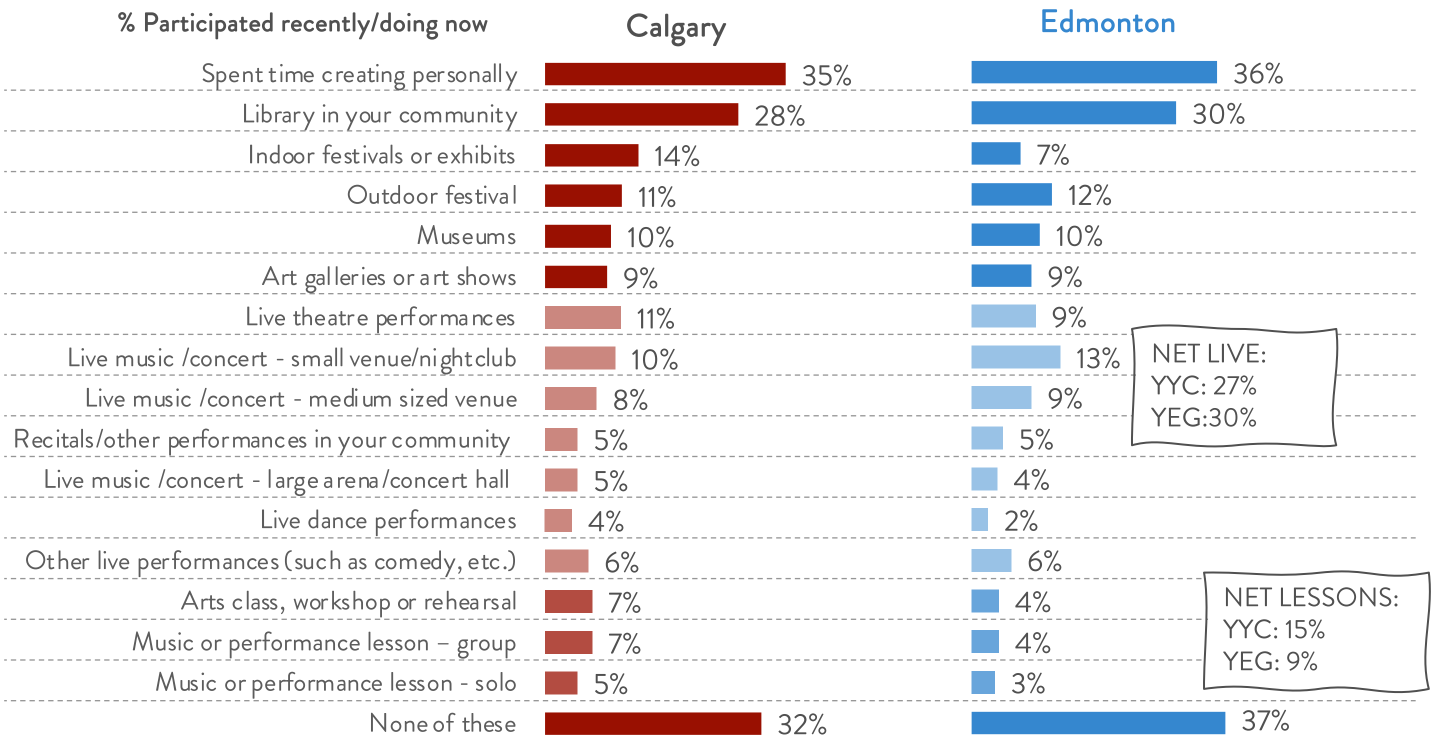
General community participation in the experience economy is still significantly softer than pre-pandemic.



First, we would like to know more about what activities, events and experiences you have been enjoying in the last few weeks. Which of the following have participated in recently or are doing now?

Base: Calgary (n=502), Edmonton (n=500)

Arts & Culture: audiences are still engaging in smaller or less formal activities (compared to live or structured lessons)



Now we are interested in any arts & culture related activities you may have attended or participated in. Which of the following have participated in recently or are doing now?
Base: Calgary (n=502), Edmonton (n=500)

But the motivations for engaging in arts & culture have held constant: fun, social, and health are top reasons.

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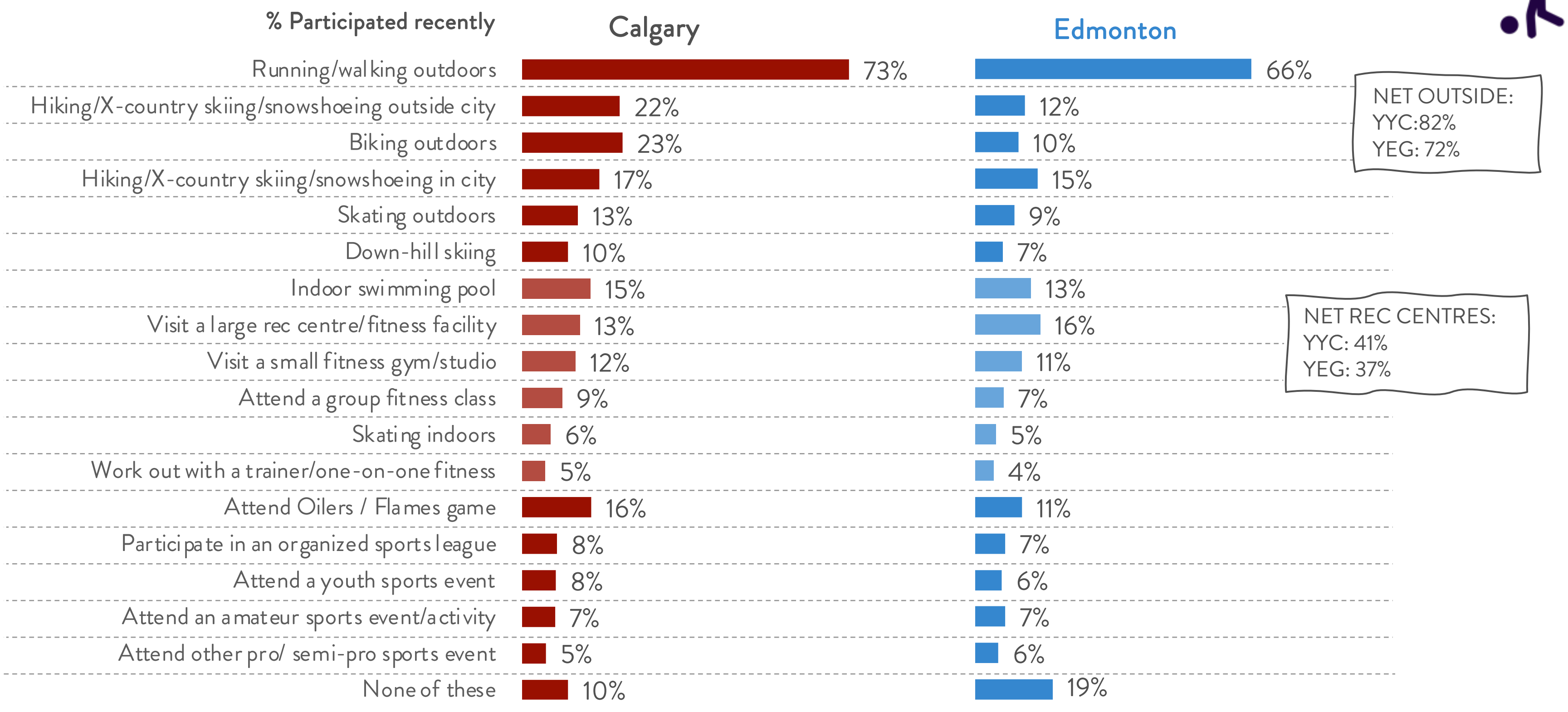
Trying something unique or different is an emerging motivator that stems from the pandemic where consumers were forced to shift habits or preferences.

	City		Age		
% Selected	Calgary	Edmonton	18-34	35-54	55+
To just have fun	77%	76%	87% ↑	73%	68% ↓
To get out of the house and be social	52% ↓	62% ↑	61%	57%	52%
To support my own mental health	50%	55%	60% ↑	48%	47%
To try something unique/different	48%	40%	52% ↑	44%	34% ↓
To socialize with my friends	47%	50%	57% ↑	48%	38% ↓
Spend time with my family	45%	42%	43%	51% ↑	35% ↓
Learn something new/educate myself	44%	43%	40%	46%	44%
Escape my everyday life	38%	40%	50% ↑	37%	28% ↓
To support the artists	36%	38%	41%	35%	34%
To cultivate my own artistic interests	36%	41%	38%	41%	35%
To support my community	33%	39%	34%	34%	41%
To be with people who share the same interests as me	27%	34%	34%	26%	31%
To laugh, cry or have any emotional experience	25%	29%	33% ↑	25%	21%
Learning/enrichment with my kids	22%	18%	16%	36% ↑	4% ↓
To feel part of a group/connected to others	21%	22%	25%	20%	19%
Be a part of something exclusive/special	13%	12%	13%	11%	12%
To meet new people	10%	12%	10%	11%	12%
To network with colleagues/clients	6%	6%	6%	7%	6%
Base size n=	*342*	*314*	*230*	*246*	*180*

What are the main reasons you engage with these types of [arts & culture] experiences?
Base: Participated in arts/culture activities

In terms of active engagement, outside experiences still dominate



Finally, which of the following active experiences have you participated in recently or are doing now?
Base: Calgary (n=502), Edmonton (n=500)

And the motivations for participating in active experiences are focused on health, fun, personal goals and socialization

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% Selected	City		Age		
	Calgary	Edmonton	*18-34*	*35-54*	*55+*
For my physical health	79%	79%	77%	77%	83%
For my mental health	68%	71%	71%	67%	70%
Just to have fun	56%	59%	65% ↑	56%	50% ↓
To reach a fitness/health goal	49%	48%	54%	48%	43%
To get out of the house and be social	42%	41%	43%	38%	45%
Spend time with my family	36%	36%	33%	43% ↑	32%
To socialize with my friends	33%	30%	36%	32%	27%
Escape my everyday life	31%	30%	34%	34%	23% ↓
To be with people who share the same interests as me	16%	19%	15%	16%	23%
Learning/enrichment with my kids	15%	11%	12%	23% ↑	2% ↓
To try something unique/different	13%	14%	17% ↑	14%	7% ↓
To feel part of a group/connected to others	13%	11%	12%	11%	13%
Learn something new/educate myself	10%	12%	9%	12%	11%
To meet new people	9%	8%	8%	7%	11%
Be a part of something exclusive/special	5%	4%	4%	5%	4%
To network with colleagues/clients	5%	4%	4%	5%	3%
Base size n=	*450*	*407*	*293*	*320*	*244*

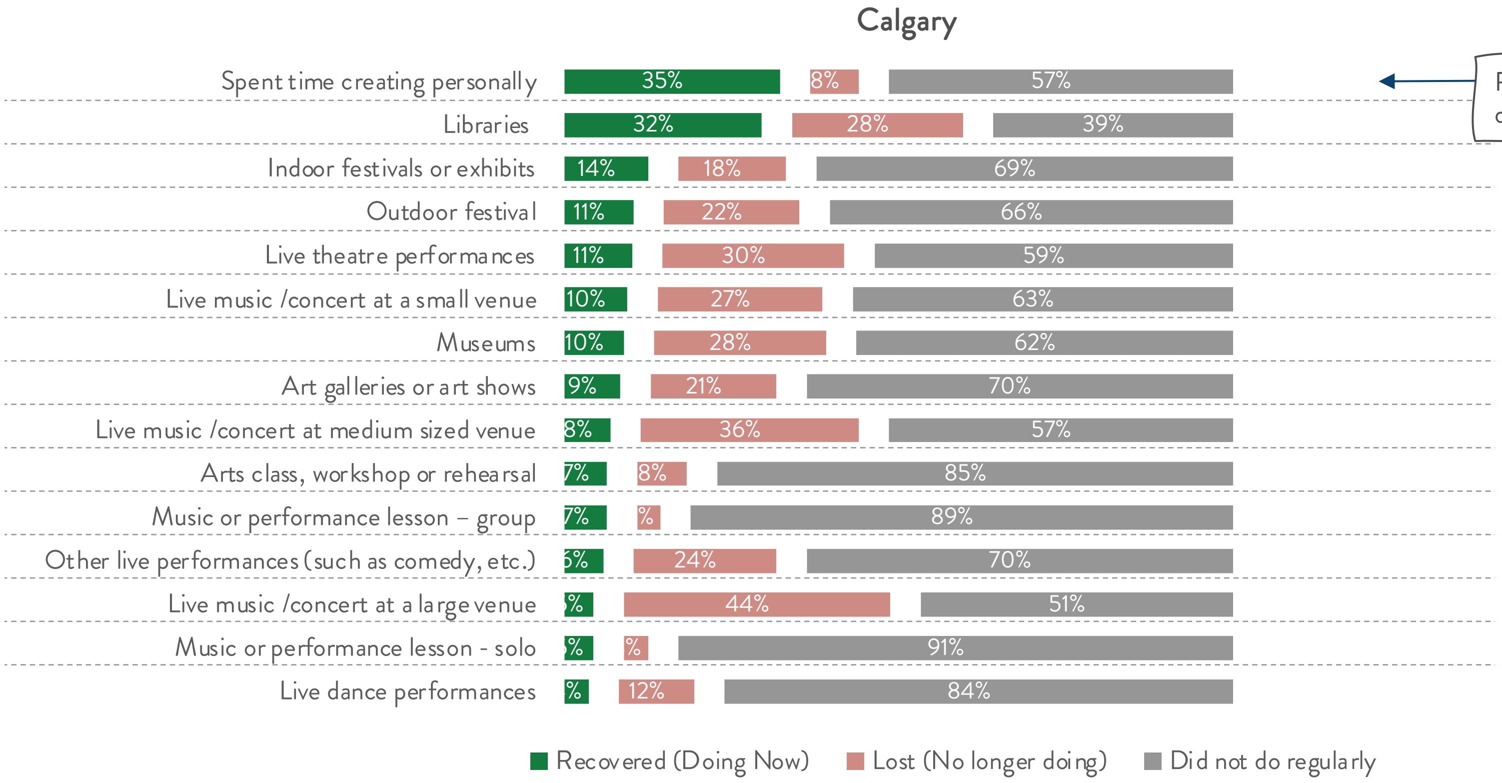
This aligns very closely to motivations for engaging in the arts: the core motivations are consistent.

Active experiences differentiate slightly on health and personal goals.

What are the main reasons you engage with these types of [active] experiences?
Base: Participated in active experiences


What’s been left behind?

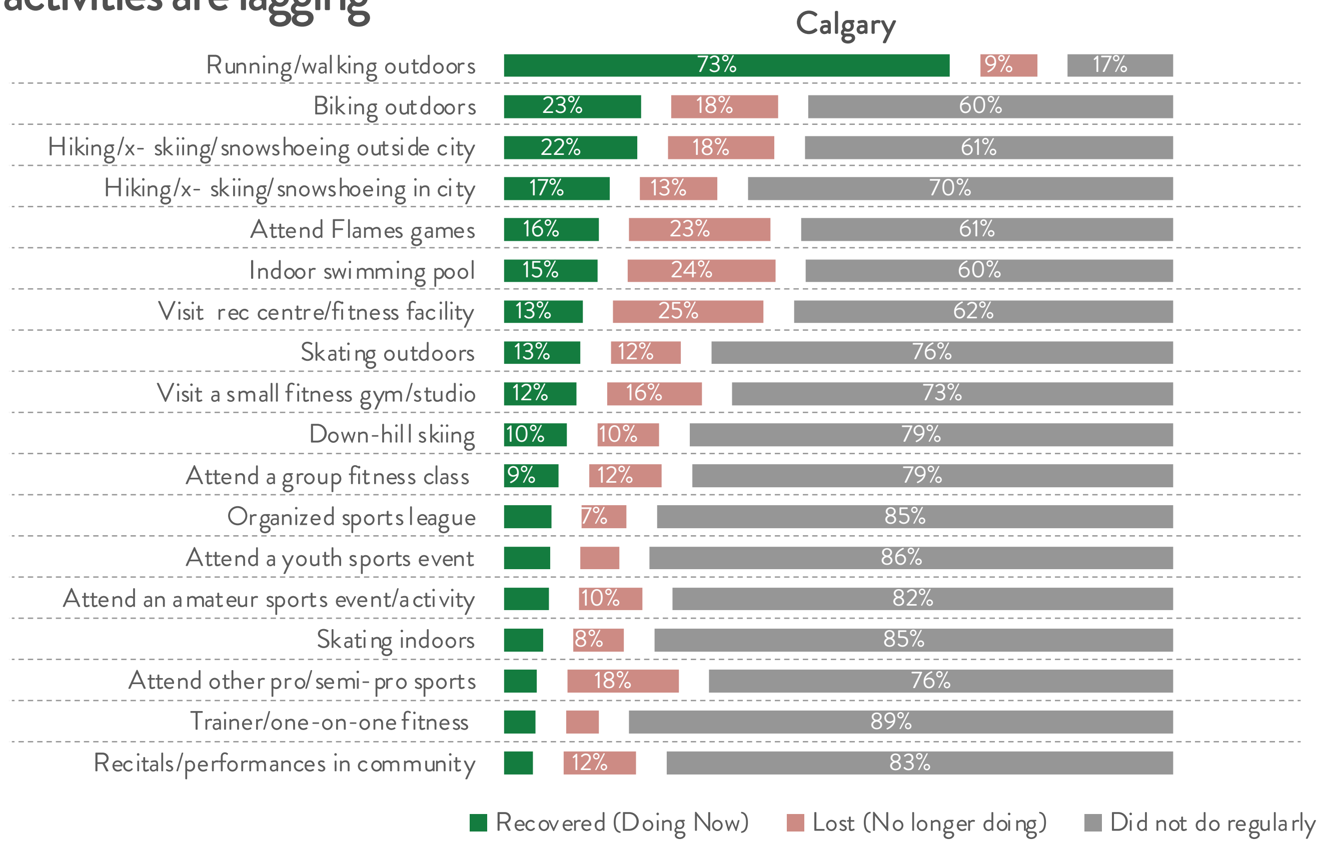
Arts & Culture: Calgarians are still taking their time in returning to many live performances



Reflects self-directed activities.

Which of these activities, if any, were things you used to do BEFORE the pandemic?
Base: Calgary (n=502)

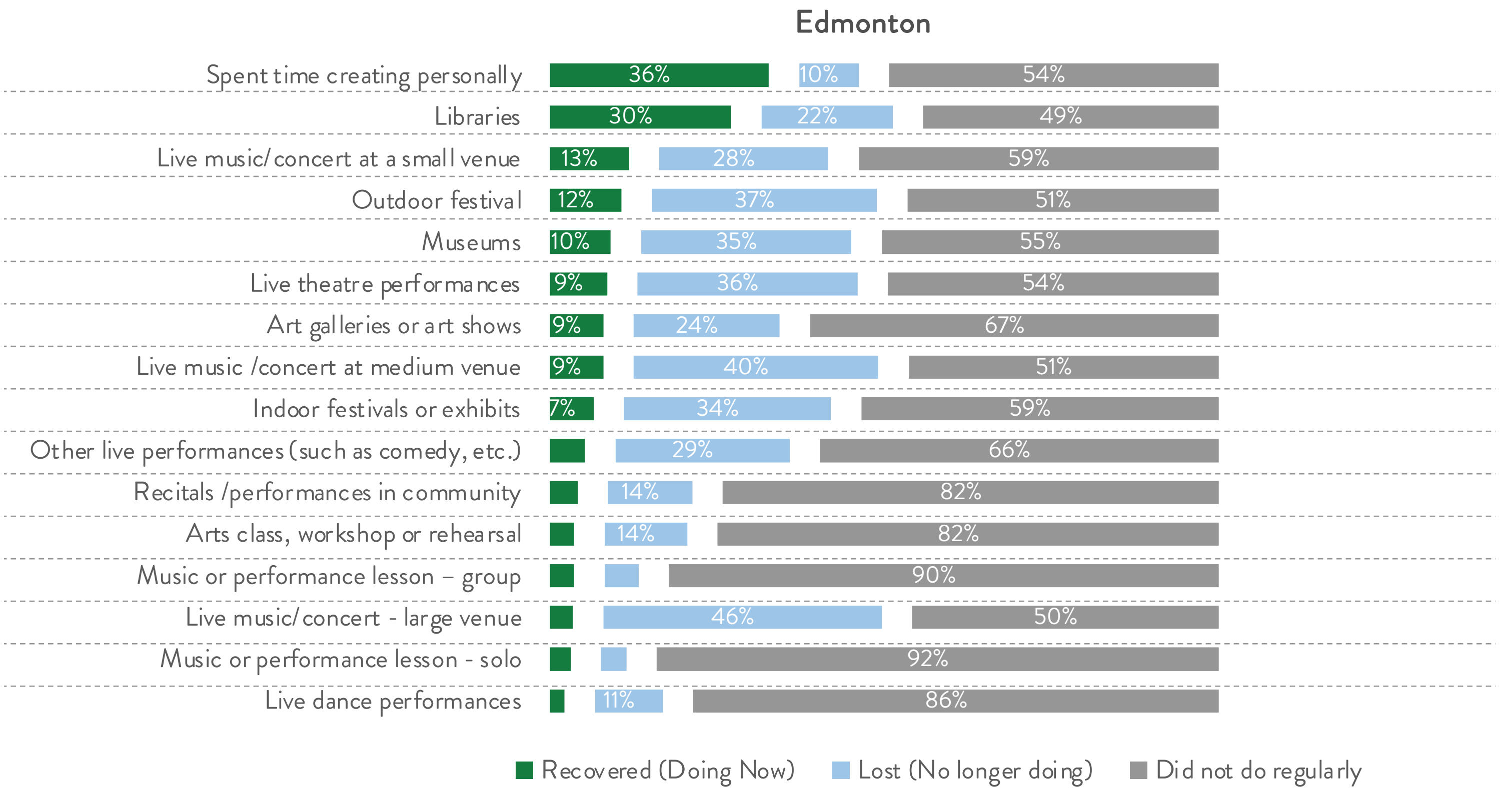
Active: Calgarians are returning to active pursuits with slightly more regularity but indoor activities are lagging



Which of these activities, if any, were things you used to do BEFORE the pandemic?

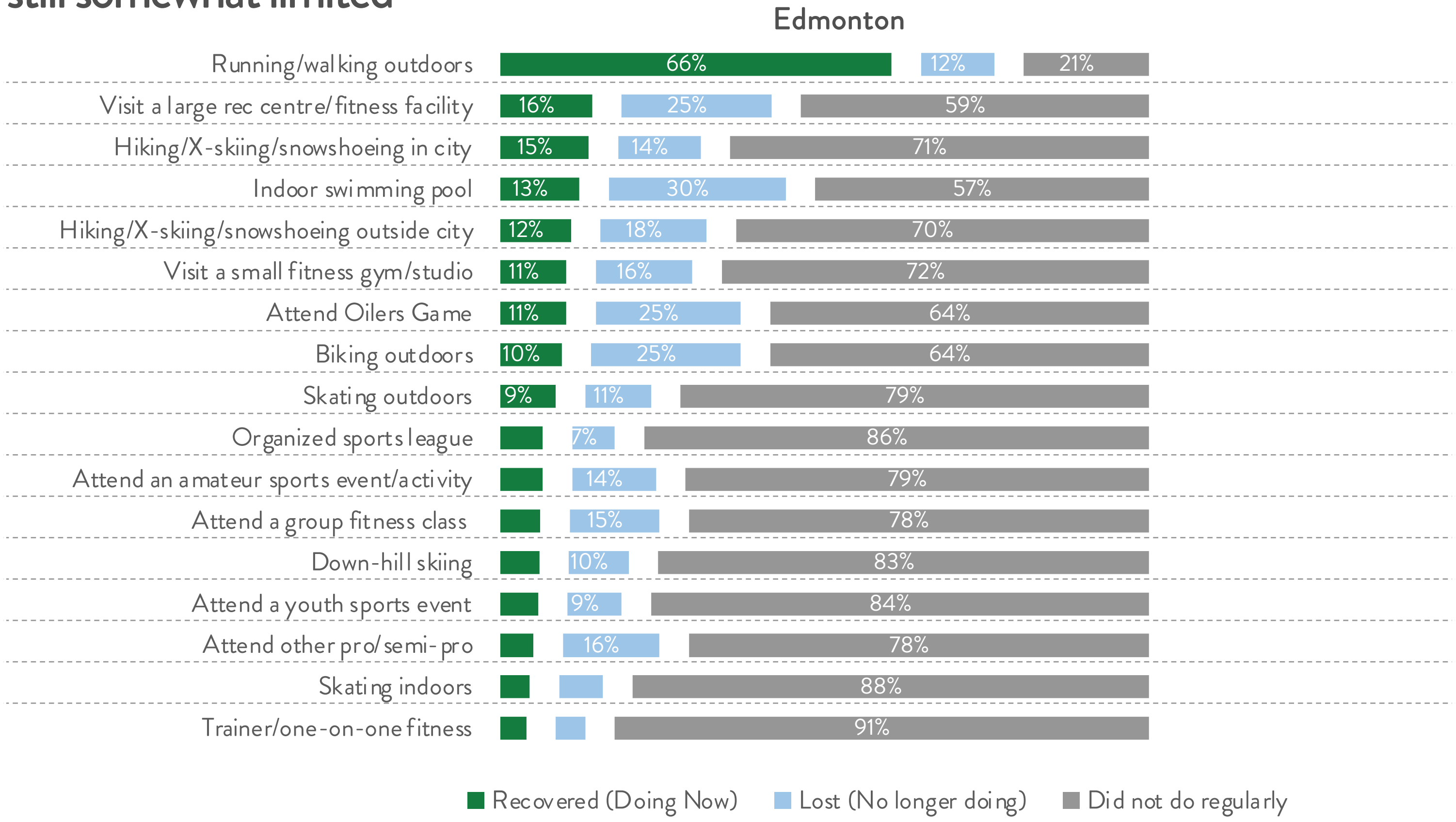
Base: Calgary (n=502)

Arts & Culture: Similarily, live performances have not recovered audiences fully yet in Edmonton



Which of these activities, if any, were things you used to do BEFORE the pandemic?
Base: Edmonton (n=500)

Active: The return to active experiences has been quicker overall but indoor activities are still somewhat limited



Which of these activities, if any, were things you used to do BEFORE the pandemic?
Base: Edmonton (n=500)

And the primary barriers for not engaging anymore are either financial or comfort

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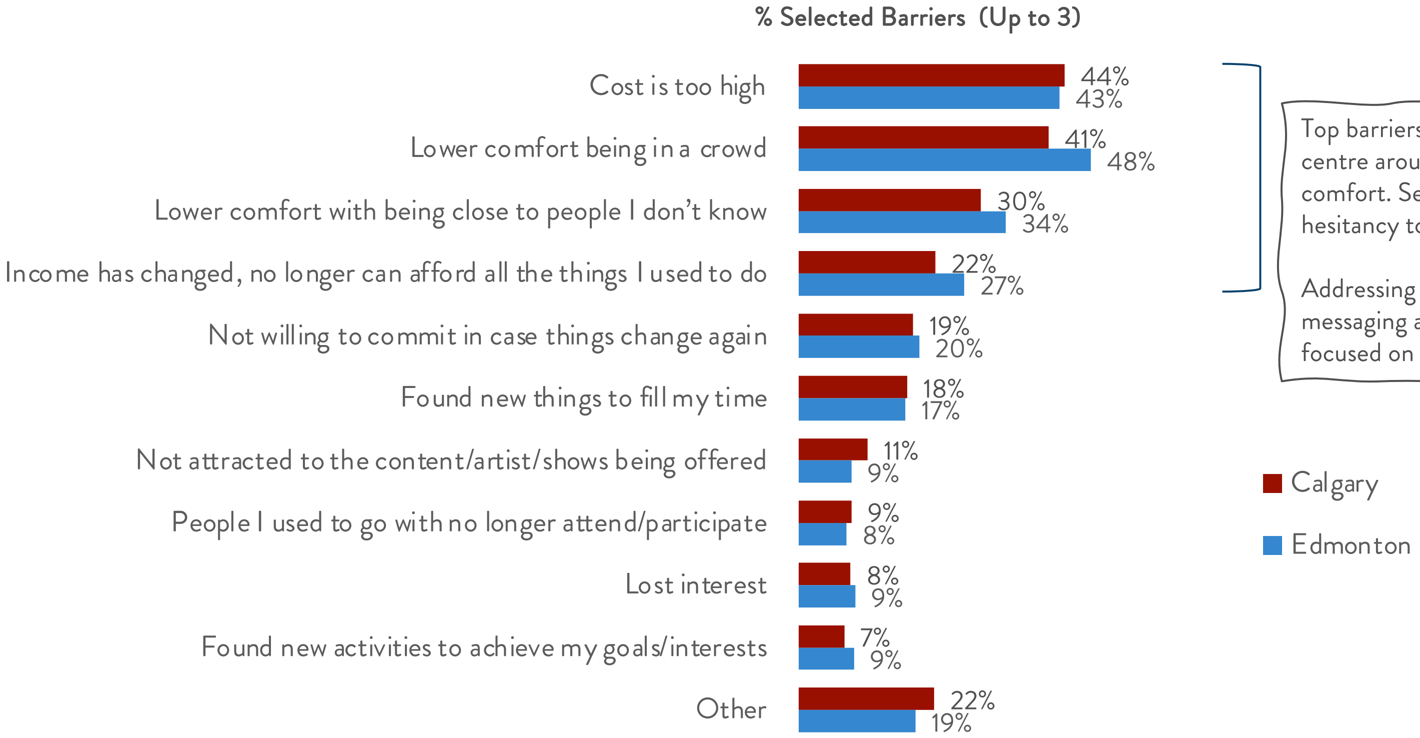


Top barriers for engagement centre around cost and/or comfort. Secondary is a hesitancy to commit.

Addressing these will be messaging and offers focused on **value** and **safety.**

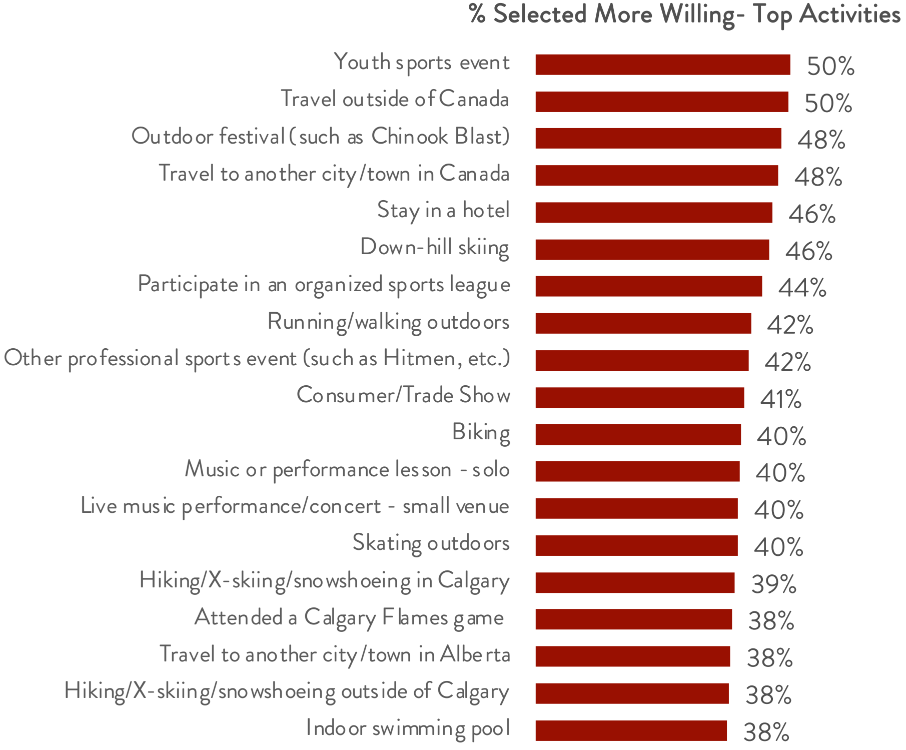
What are the main reasons why you aren't engaging with those activities anymore? (Select up to 3 reasons) ?

Base: Not participating in at least one activity now, Calgary (n=495), Edmonton (n=486)

Understanding planning behaviours

What are Calgarians most willing to re-engage in?

Activities that Calgarians are most willing to engage in with the full removal of restrictions are going to reflect a number of factors: **interest and connection** to activity (such as kids in sports), **comfort** levels, and **financial ability** (which may negatively impact more expensive endeavors).



In recent weeks, almost all health restrictions related to the COVID-19 pandemic have been lifted here in Alberta. Now that restrictions are lifted, are you more or less willing to return to these activities in the near future? *Base: Calgarians more willing to do at least one activity (n=varies)*

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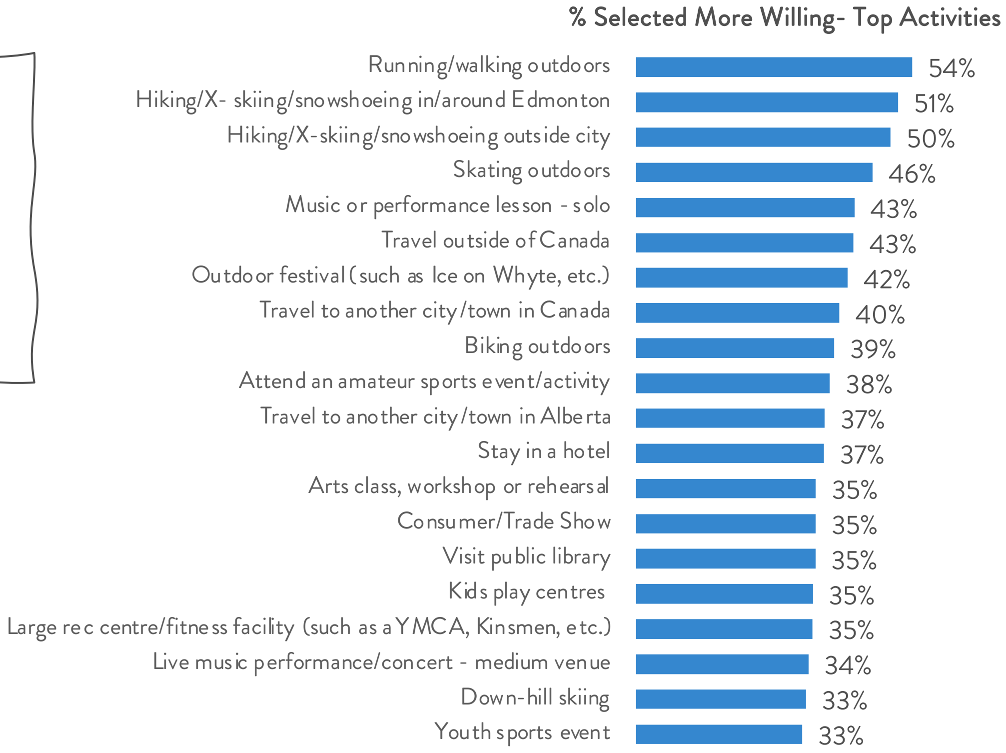
What are Edmontonians most willing to re-engage in?

Edmontonians differ from Calgarians in the activities they are most keen to re-engage in: outdoor active pursuits are most preferred, while live performances do not yet have a widespread willingness to participate.



In recent weeks, almost all health restrictions related to the COVID-19 pandemic have been lifted here in Alberta. Now that restrictions are lifted, are you more or less willing to return to these activities in the near future? *Base: Edmontonians more willing to do at least one activity (n=varies)*

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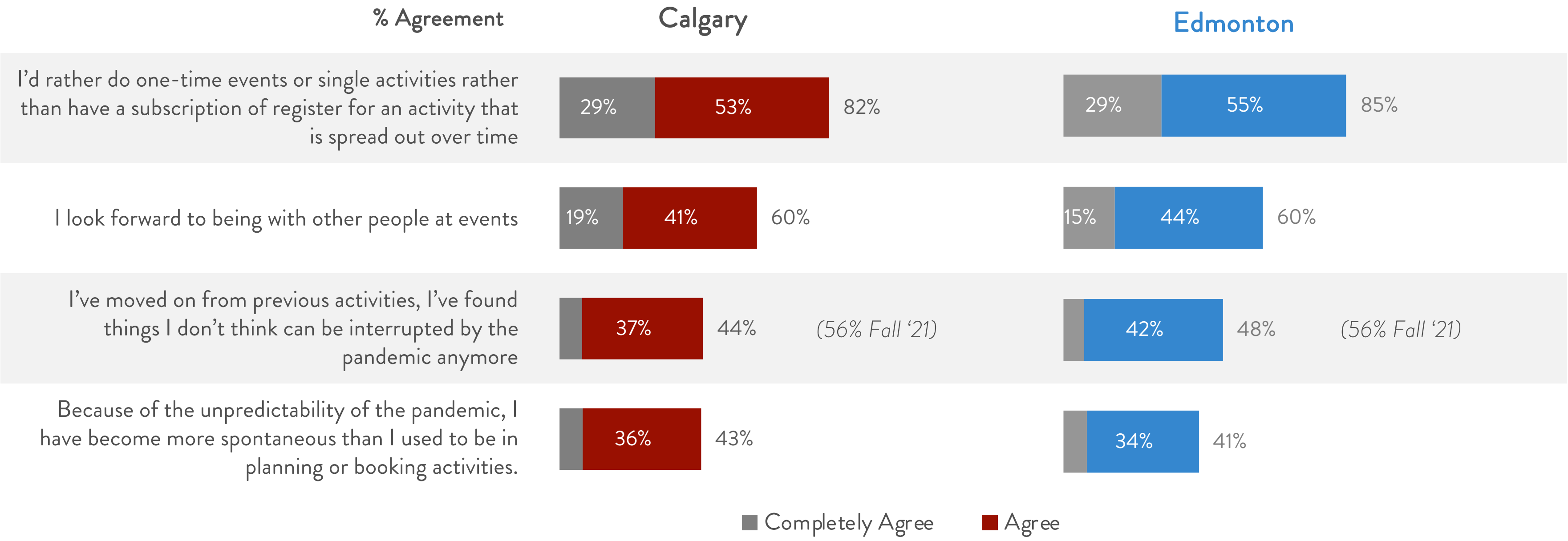
How are activities being approached going forward?

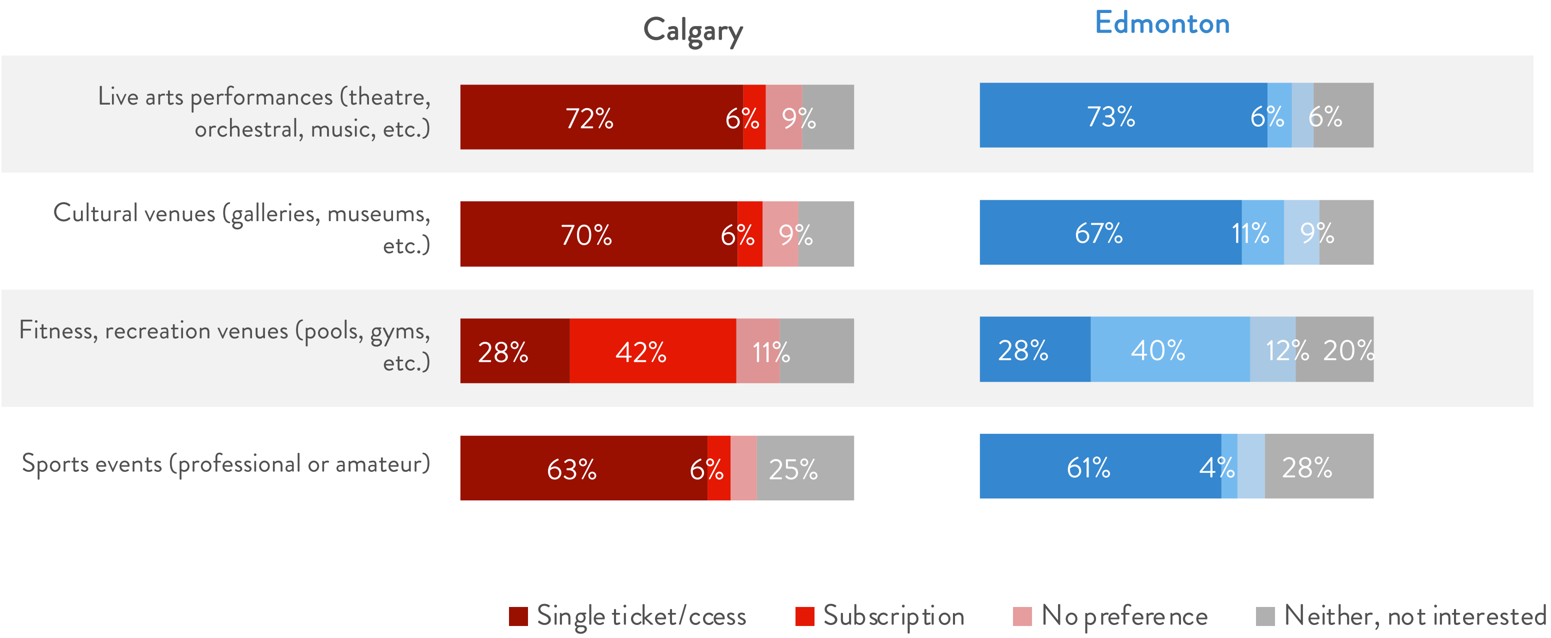
It is clear that consumers are favouring single activities over subscription or longer-term commitments – this accelerates a trend that has been emerging for some time but also reflects some of the hesitancy and uncertainty that still exists within the pandemic environment. There is also a significant portion of consumers who are more spontaneous that previously which means planning patterns are further disrupted.



Below are a few things people might say about the current situation in Alberta. Please tell us if you agree or disagree with each one.
Base: Calgary (n=502), Edmonton (n=500)

Single ticket access remains the preferred way to participate in most activities, especially arts and culture related.

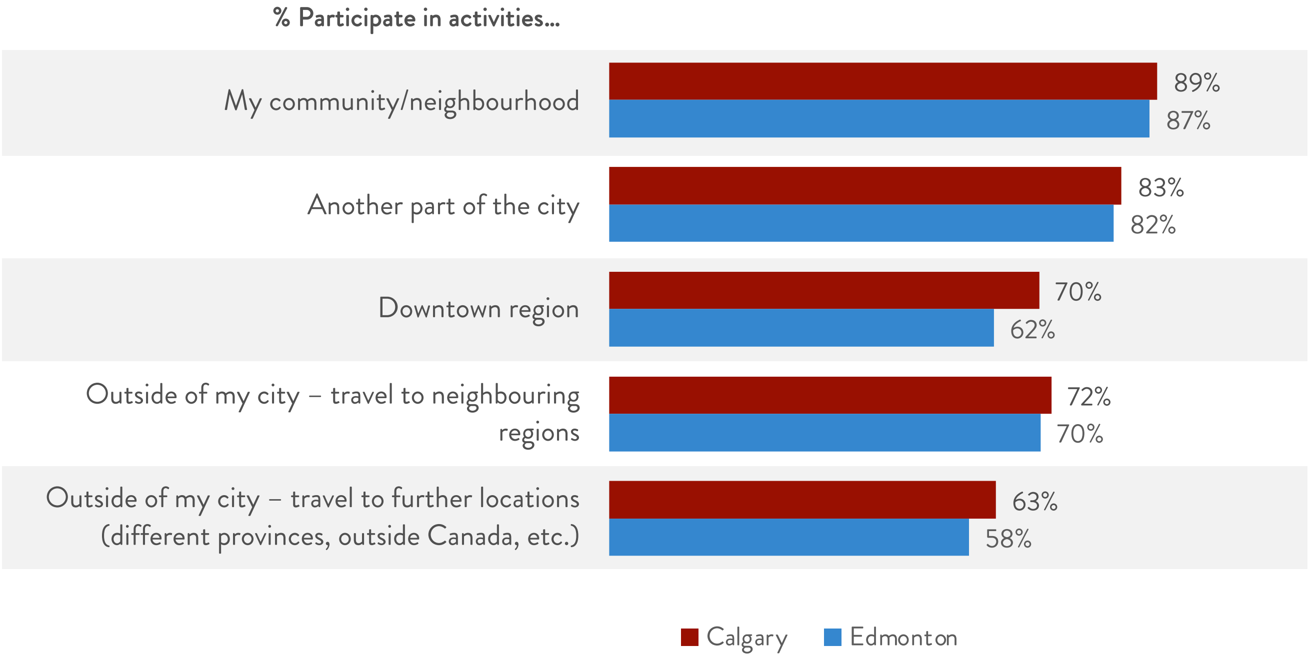
There is still a preference for subscriptions/ongoing access or fitness and rec venues, but this is softer than it might have been pre-pandemic.



Generally speaking, which do you prefer for each of the following...?
Base: Calgary n=502, Edmonton n=500

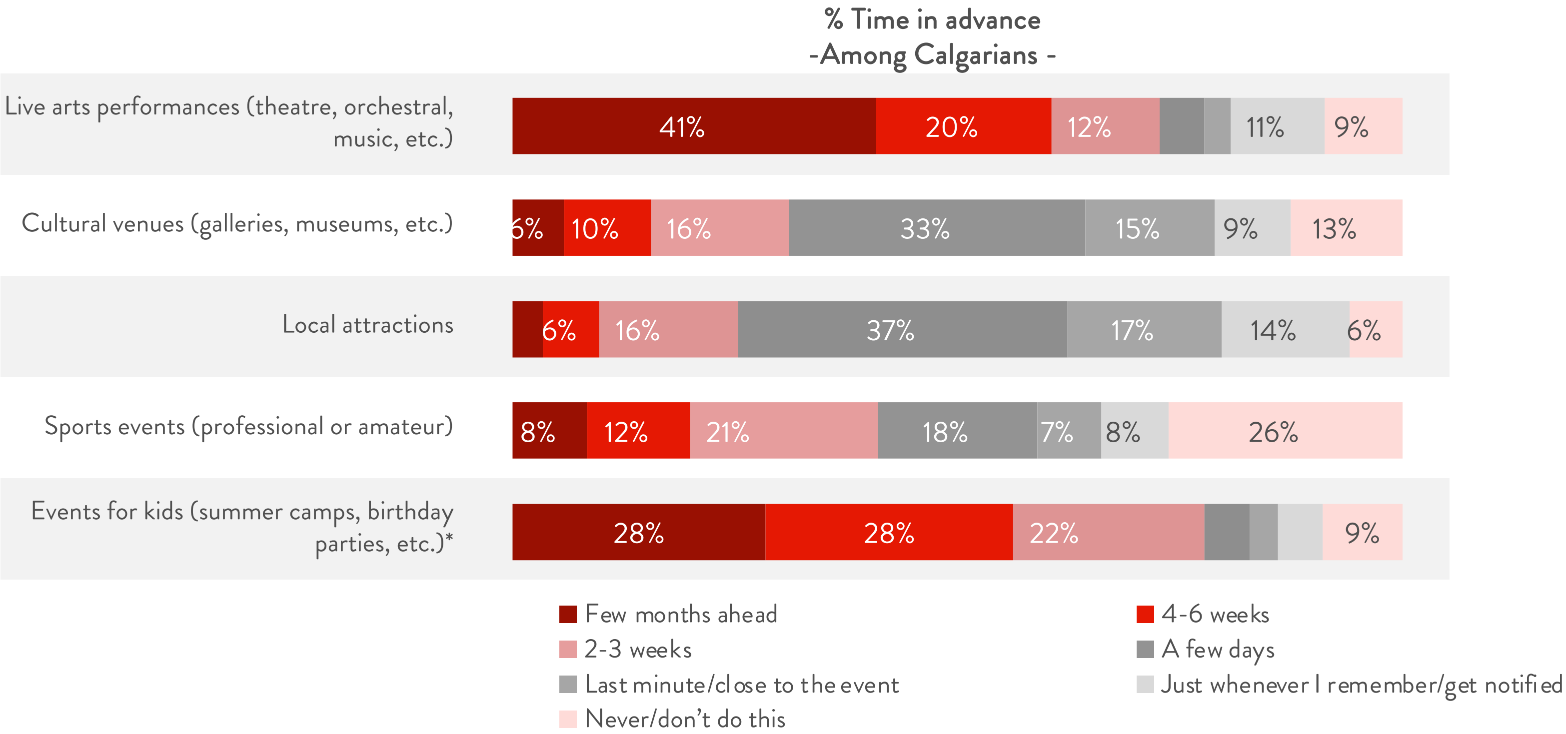
But generally speaking, travel doesn't seem to be a significant barrier to participation in activities

Individuals are most keen to engage in activities close to home but the appetite to travel is still apparent. The fact that current travel is being done at lower rates likely speaks to some hesitancy around process, logistics, or potentially costs (comfort as well but to a lesser degree). This may take time to rebound but desire is there.



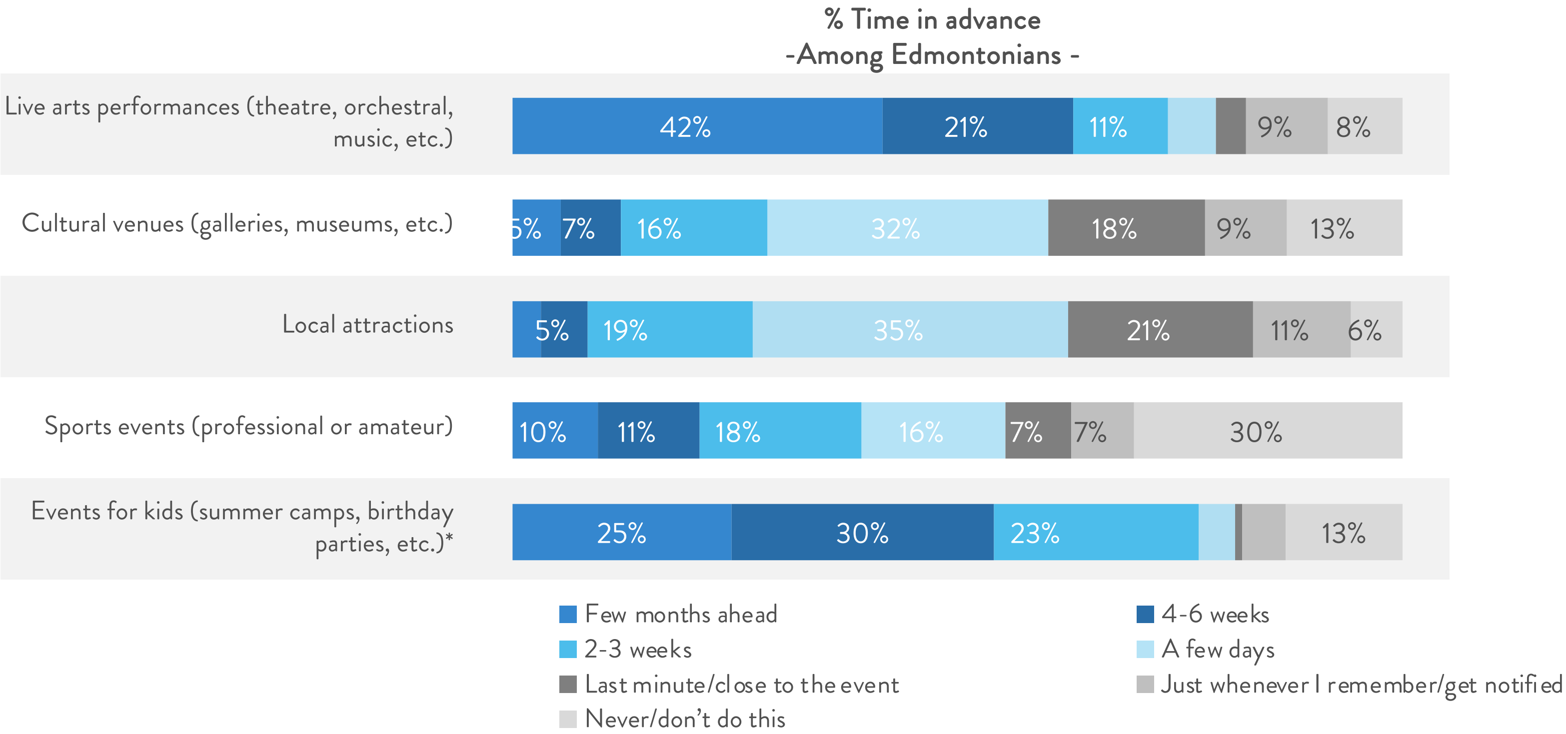
As events and activities begin to resume in Alberta, some people prefer to remain close to home and others are more willing to travel to different locations. Would you participate in specific activities and events that are in…?*Base: Calgary (n=502), Edmonton (n=500)*

Calgary: Live performances and kids events are activities that are most commonly planned ahead for. For other venues/attractions, the decision making done closer to the event



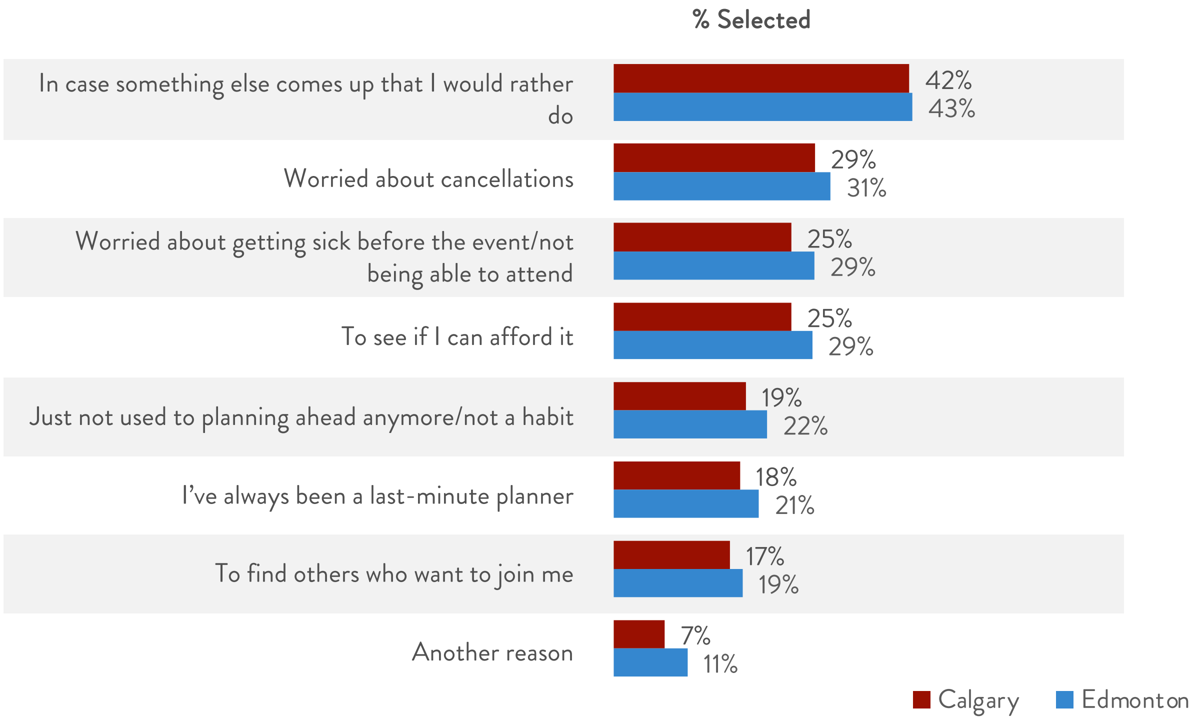
We want to understand how far you plan ahead for activities. Thinking about the following activities and events, how far in advance are you willing to commit and purchase tickets/reservations? *Base: Calgary n=502 *Among parents with kids at home only*

Edmonton: Edmontonians exhibit similar patterns; planning further ahead for live performances, kids events but closer to the date for other types of attractions/activities



We want to understand how far you plan ahead for activities. Thinking about the following activities and events, how far in advance are you willing to commit and purchase tickets/reservations? *Base: Edmonton n=500 *Among parents with kids at home only*

Why buy closer to the activity? Most keep their options open but concerns about cancellations and illness are also prominent



Why do you sometimes buy closer to the event?
Base: Buy close to event for at least one activity, Calgary (n=353), Edmonton(n=340)

Continuing to offer flexible refund and cancellation policies can help combat this hesitation and encourage earlier commitments

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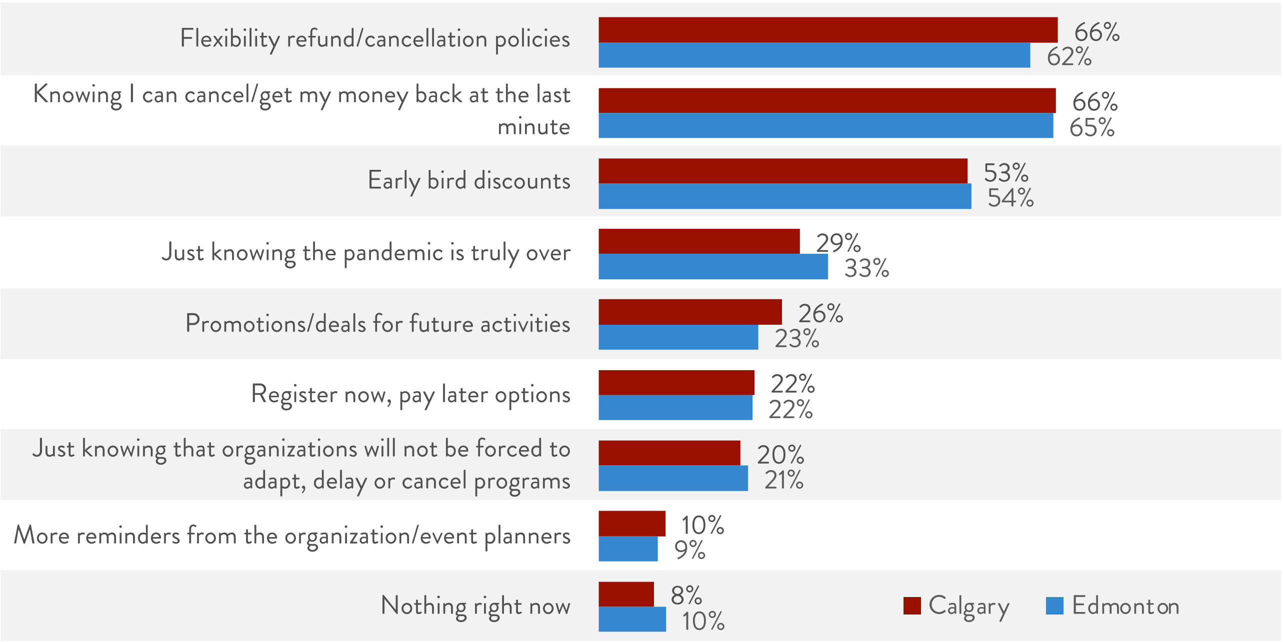
% Selected – Encourage earlier purchase



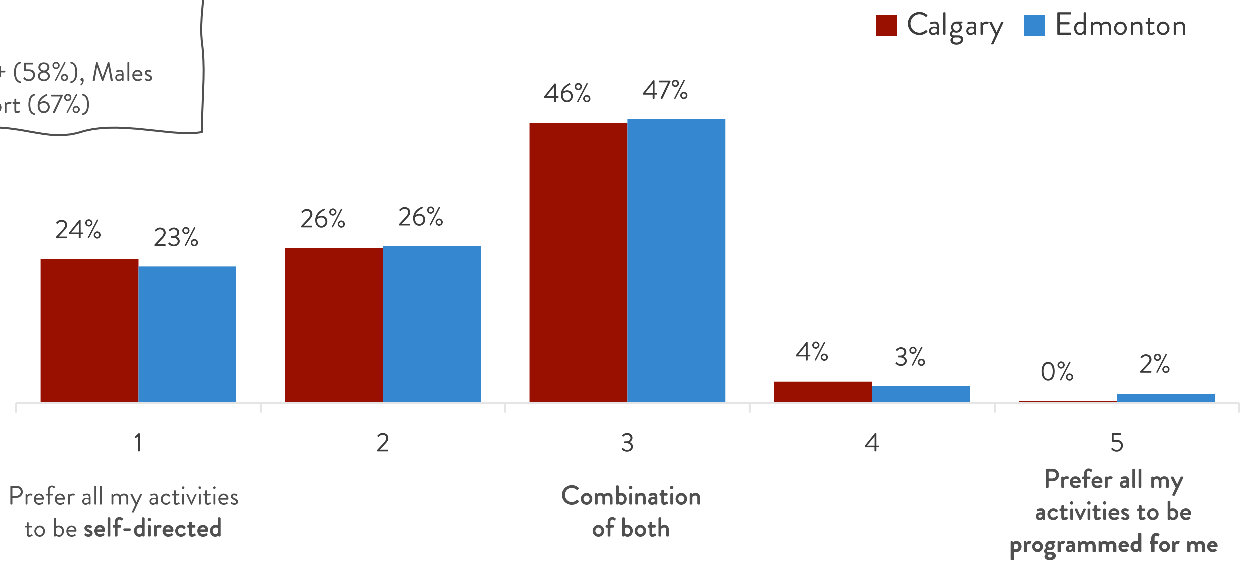
What, if anything, could encourage you to purchase tickets or make a reservation further in advance?
Base: Buy close to event for at least one activity, Calgary n=353, Edmonton n=340

Preferences show a mix of self-directed and programmed activities

The rise of self-directed activities was very evident during the height of covid (often out of necessity). While the pendulum has swung back slightly, it is still clear that that flexibility of self-directed means many of these habits are staying put.

%Self-Directed:
- YYC – 50%
- YEG – 49%
- Higher among 55+ (58%), Males (54%), Low comfort (67%)

% Preference for type of activity



Thinking about your own preferences, what balance of self-directed versus programmed activities are you looking for? Please use a scale of 1 to 5 where 1 means you prefer all your activities and experiences be self-directed and 5 means you prefer all activities to be programmed/organized for you *Base: Edmonton (n=500), Calgary (n=502)*

Communication and information needs

Arts & Culture: messaging still needs to reflect the main barriers of engagement and address cost and comfort (through value and safety messages).

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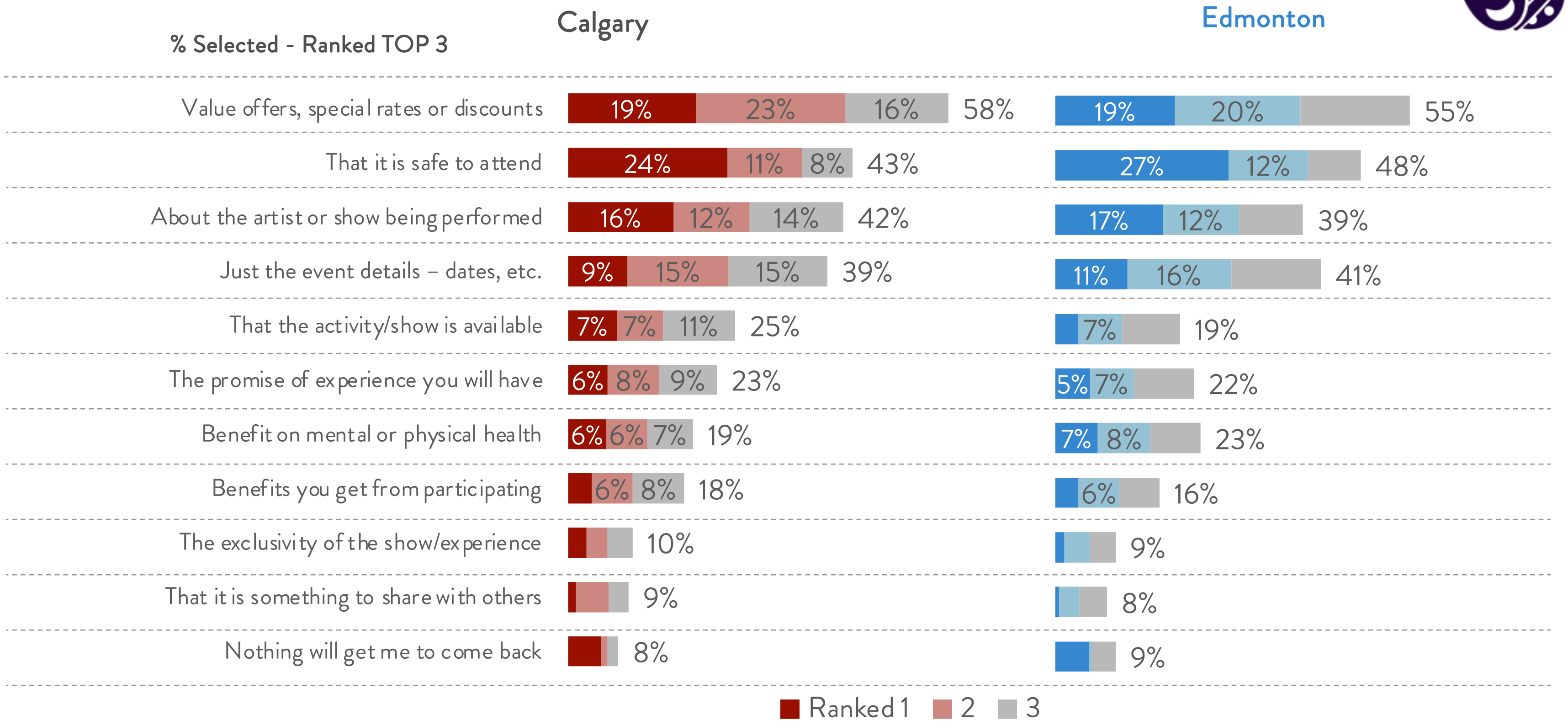
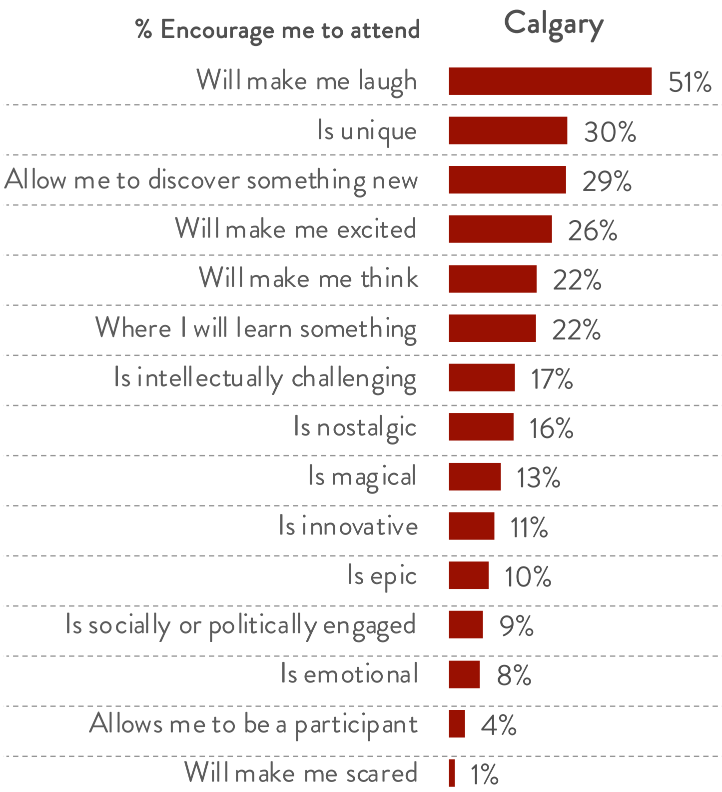
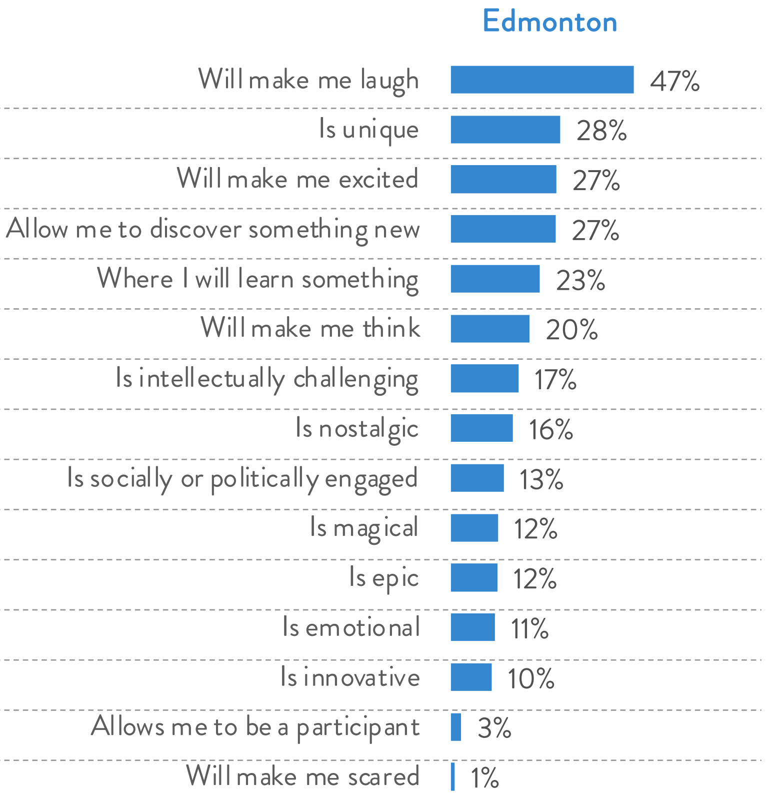


Please rank the top three messages that would be most likely to encourage you to visit *Base: Calgary (n=502), Edmonton (n=500)*

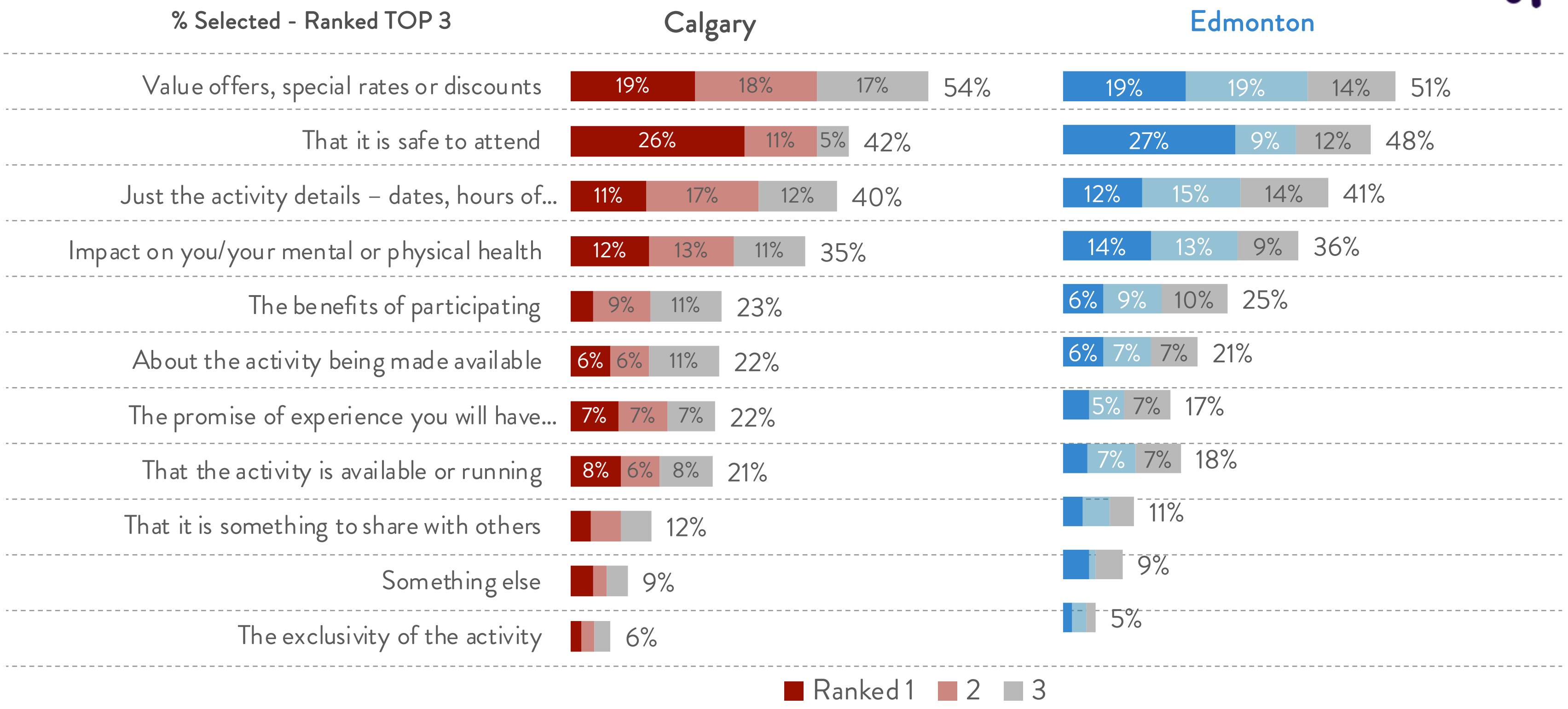
In terms of content, preferred themes are more lighthearted over epic, challenging or emotional





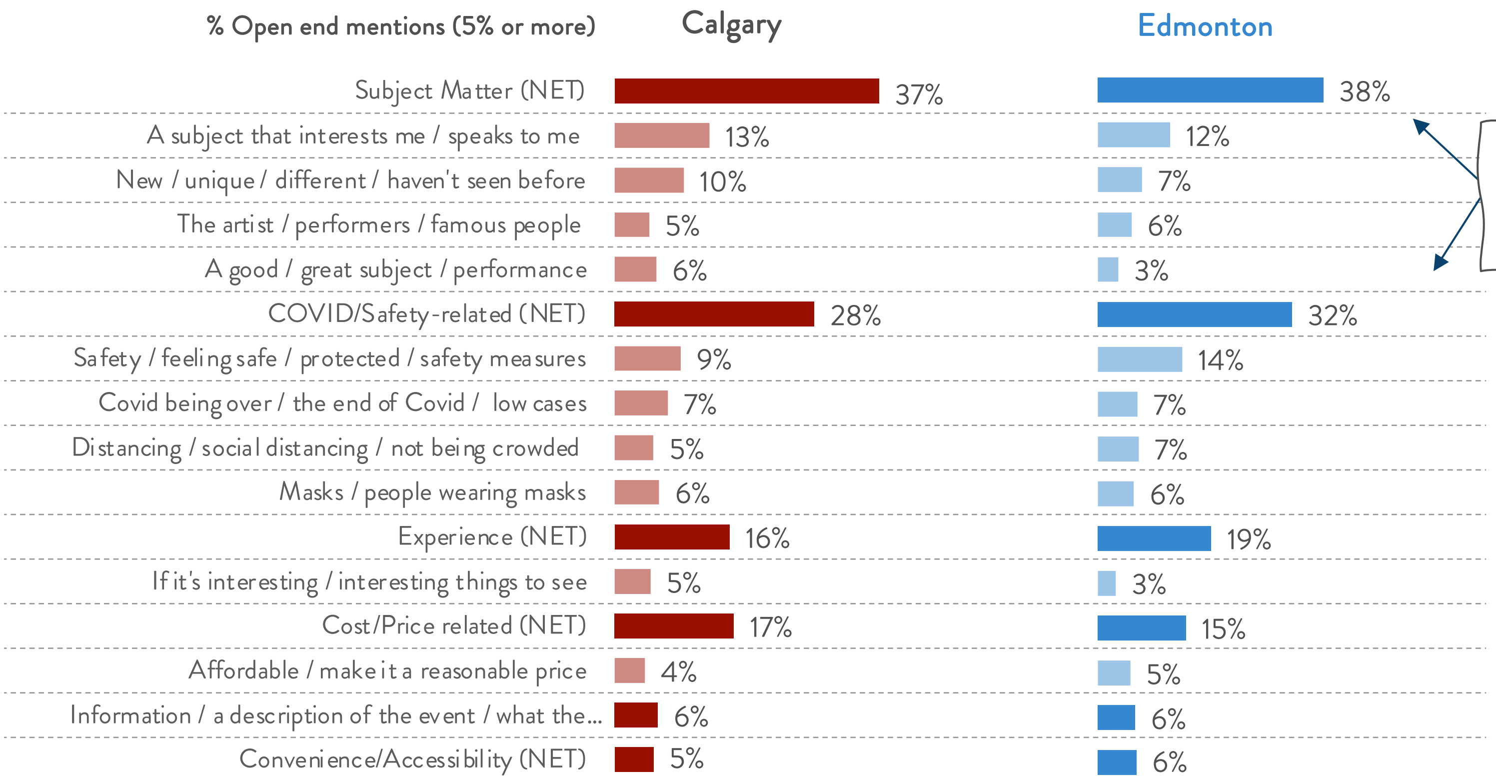
When it comes to arts & culture performances, I am more likely to attend if the performance...
Base: Calgary (n=502), Edmonton (n=500)

Messaging for active experience is similar (value and safety) but there is a higher importance placed on benefits/health impacts



There are many different types of messages organizers of active experiences could use to get people playing or watching sports, participating in fitness, outdoor, or other recreational experiences. Some are listed below. Please rank the top three messages that are most likely to encourage you to participate *Base: Calgary (n=502), Edmonton (n=500)*

What do audiences say they need to participate in arts and culture experiences?

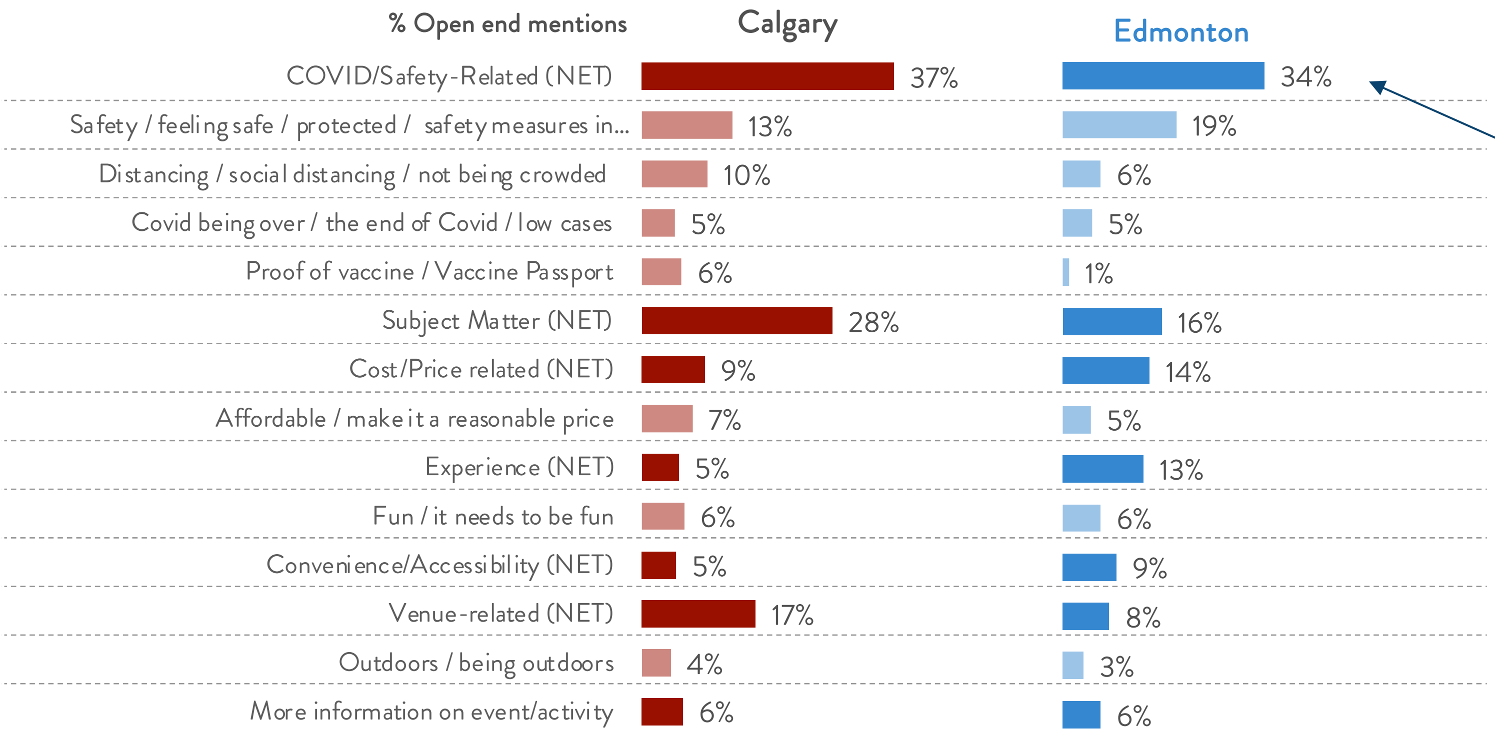


The subject or content reflects interest and motivations more directly than safety.

In your own words, what do you need to hear or see in order to participate in arts & culture experiences?

Base: Provided responses, Calgary (n=499), Edmonton (n=498)

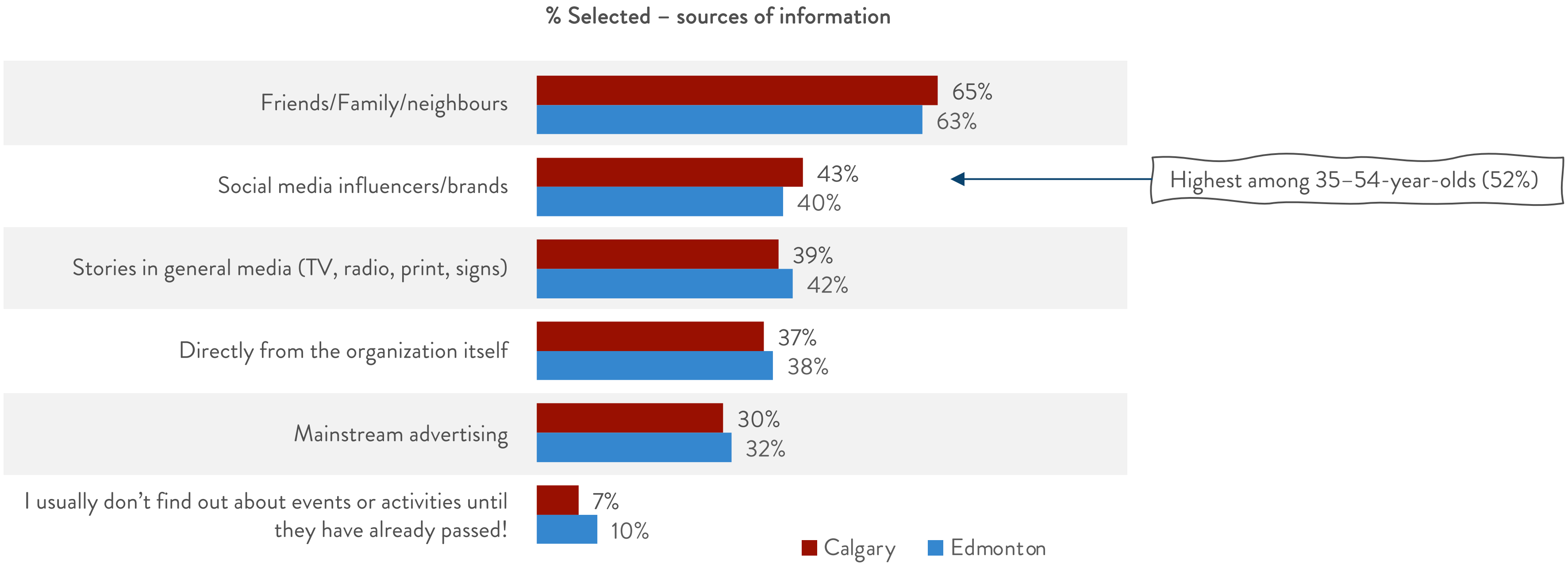
And what do audiences need to hear to participate in active experiences?



Many involved in active experiences may not need to hear COVID-specific messages but rather, organizations need to build this into their planning.

In your own words, what do you need to hear or see in order to participate in **active** experiences?
Base: Provided responses, Calgary (n=499), Edmonton (n=498)

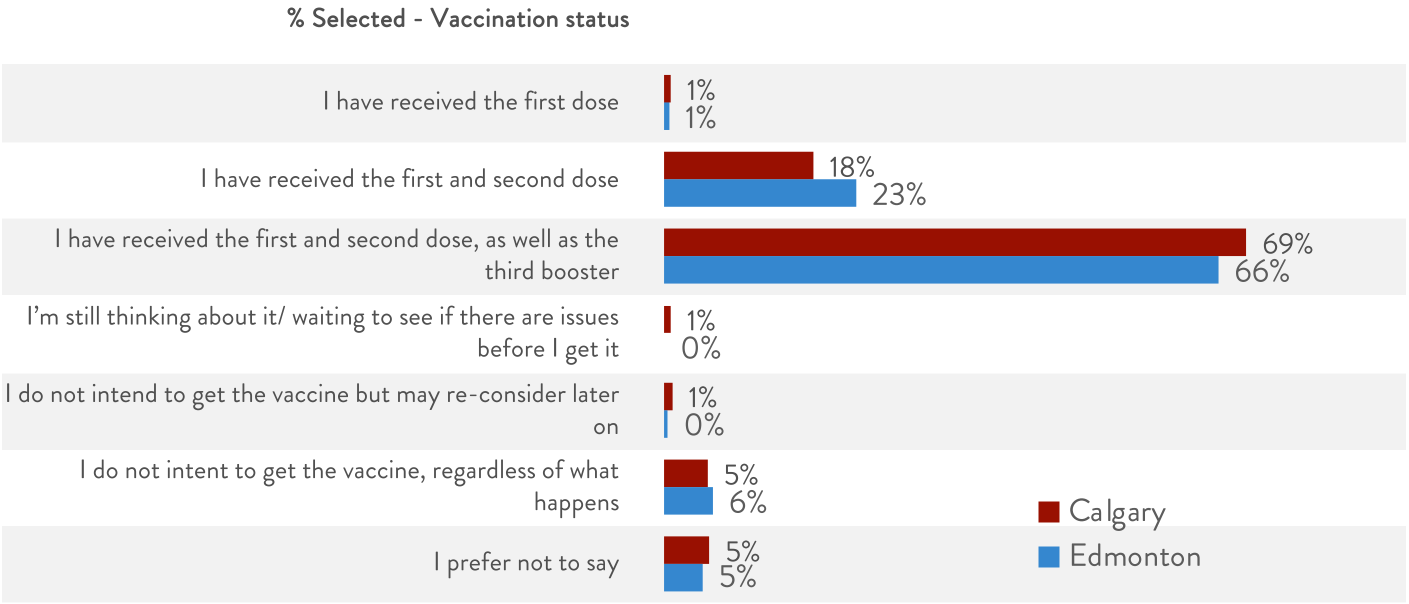
Word-of-mouth remains the largest source of information for events/activities but social media influencers play a significant role



What sources are you most likely to hear or find out about events or activities you want to participate in?
Base: Calgary n=502, Edmonton n=500

Profiling

Vaccination status



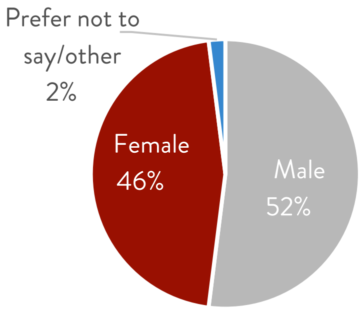
NETVACCINATED:
YYC:88%
YEG: 89%

Have you received, or do you plan to receive, the COVID-19 vaccination?
Base: Calgary (n=500), Edmonton (n=500)

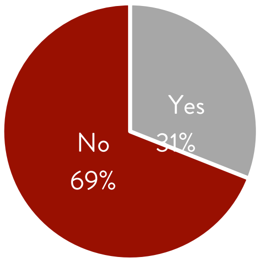
Who did we talk to in Calgary?

Stone — Olafson

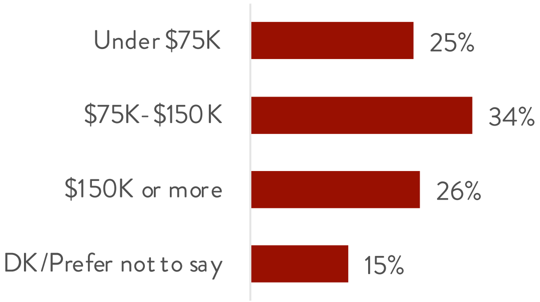
Gender



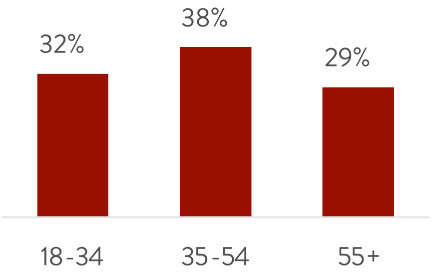
Children under 18 in HH



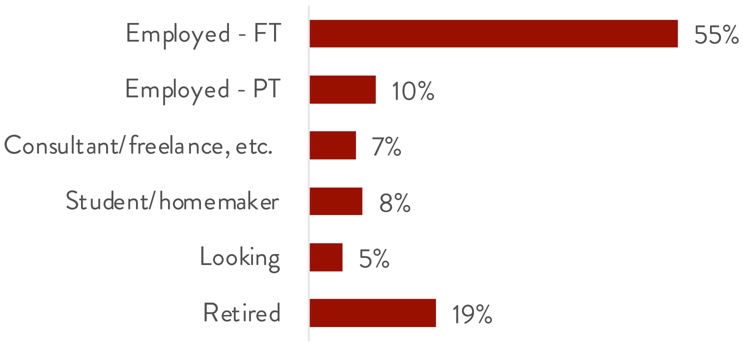
HH Income



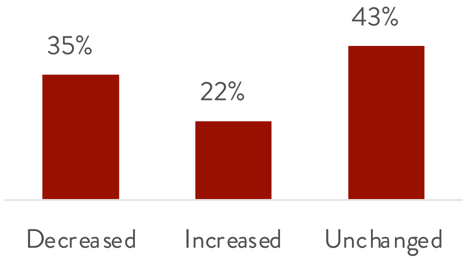
Age



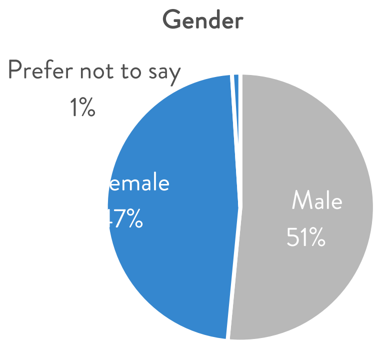
Employment

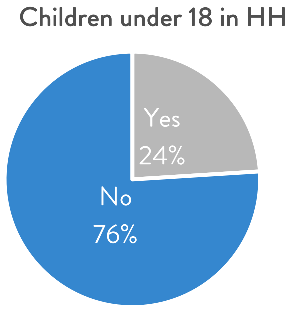


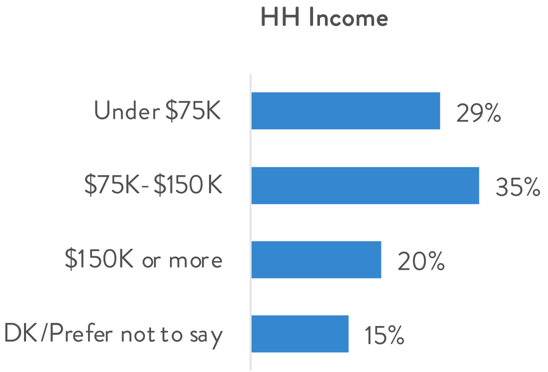
Income change since COVID-19

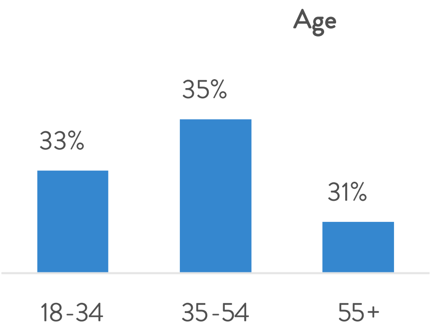


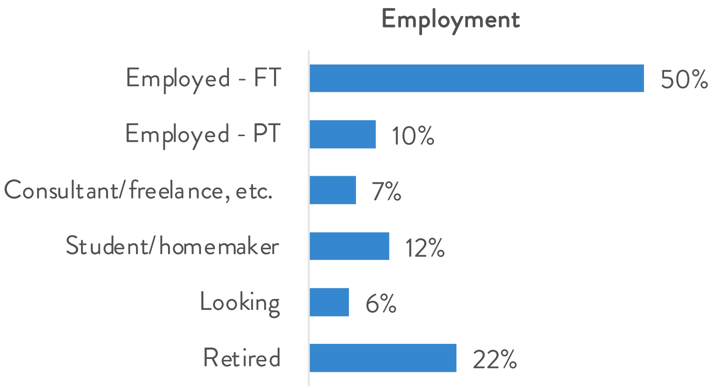
Who did we talk to in Edmonton?

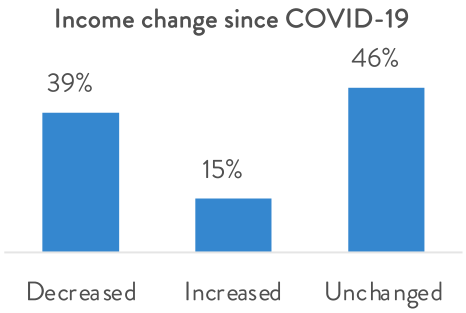












APPENDIX

- What Does “More Willing” Look Like?

Calgary: More Willing to Participate in Arts & Culture

Stone — Olafson

	Age			Gender		Kids @ Home		HH Income - COVID		
% Selected	18 to 34	35 to 54	55+	Female	Male	Yes	No	Decreased	Unchanged	Increased
Outdoor festival (such as Chinook Blast)	45%	52%	46%	43%	58%	52%	46%	52%	43%	48%
Music or performance lesson - solo	20%	63%	50%	27%	63%	56%	27%	50%	29%	40%
Live music performance/concert –small venue	31%	39%	53%	32%	53%	37%	41%	29%	40%	52%
Other live performances (such as comedy, etc.)	29%	41%	44%	29%	48%	28%	43%	33%	33%	52%
Live theatre performances	35%	37%	41%	34%	44%	39%	37%	41%	34%	36%
Recital/performance in community	31%	41%	33%	33%	55%	35%	38%	39%	35%	36%
Live music performance/concert – med. venue	31%	33%	49%	30%	44%	28%	40%	30%	40%	36%
Live music performance/concert - large venue	28%	33%	48%	33%	37%	33%	36%	36%	34%	34%
Indoor festival or exhibit	36%	28%	50%	26%	52%	41%	31%	29%	39%	36%
Library in your community	14%	36%	50%	30%	37%	24%	39%	33%	31%	36%
Spent time creating personally	31%	31%	36%	29%	40%	36%	31%	31%	37%	25%
Live dance performances	30%	27%	46%	25%	50%	27%	35%	25%	39%	29%
Museums	33%	38%	22%	21% ↓	48% ↑	39%	28%	32%	31%	33%
Art galleries or art shows	26%	33%	35%	32%	32%	37%	30%	39%	29%	21%
Arts class, workshop or rehearsal	13%	31%	40%	31%	22%	9%	33%	44%	17%	15%
Central Library in downtown Calgary	21%	30%	27%	25%	30%	21%	31%	34%	24%	13%
Music or performance lesson – group	0%	25%	25%	8%	33%	14%	17%	25%	0%	20%

Calgary: More Willing to Participate in Active Experiences

Stone — Olafson

	Age			Gender		Kids @ Home		HH Income - COVID		
% Selected	18 to 34	35 to 54	55+	Female	Male	Yes	No	Decreased	Unchanged	Increased
Attended a youth sports event	50%	50%	50%	37%	69%	44%	56%	60%	50%	20%
Down-hill skiing	38%	50%	58%	39%	57%	38%	50%	45%	65%	18%
Participated in an organized sports league	40%	45%	60%	33%	52%	43%	45%	50%	45%	33%
Running/walking outdoors	36%	44%	47%	48%	35%	35%	46%	50%	41%	29%
Attended other pro sports	44%	34%	64%	34%	49%	39%	44%	41%	43%	41%
Biking	37%	36%	50%	36%	41%	31%	49%	47%	33%	39%
Skating outdoors	35%	39%	57%	31%	47%	27%	50%	20%	57%	40%
Hiking/X- skiing/snowshoeing in Calgary	41%	31%	53%	32%	44%	28%	49%	50%	37%	26%
Calgary Flames game at the Saddledome	32%	34%	58%	33%	44%	29%	43%	43%	38%	32%
Hiking/X-skiing/snowshoeing outside Calgary	44%	31%	37%	41%	33%	27%	44%	42%	50%	19%
Went to an indoor swimming pool	27%	42%	39%	36%	41%	34%	41%	41%	36%	32%
Public leisure centres (city-owned rec centre)	28%	42%	33%	33%	43%	35%	36%	41%	35%	28%
Large rec centre/fitness facility	35%	36%	26%	33%	38%	34%	34%	33%	45%	16%
Skating indoors	29%	29%	75%	31%	43%	21%	43%	47%	33%	17%
Visited a small fitness gym/studio	31%	31%	39%	34%	32%	29%	35%	38%	32%	27%
Attended an amateur sports event/activity	31%	24%	35%	17%	41%	22%	33%	38%	24%	29%
Attended a group fitness class	24%	23%	33%	22%	33%	18%	29%	30%	24%	20%
Worked out with a trainer/one-on-one	0%	33%	0%	21%	25%	17%	27%	23%	20%	25%

Calgary: More Willing to Participate in Community Activities

Stone — Olafson

	Age			Gender		Kids @ Home		HH Income - COVID		
% Selected	18 to 34	35 to 54	55+	Female	Male	Yes	No	Decreased	Unchanged	Increased
Streaming movies, TV or other content	67%	50%	50%	43%	57%	40%	56%	50%	50%	60%
Travel outside of Canada	39%	56%	52%	43%	58%	47%	51%	55%	46%	49%
Travel to another city/town in Canada	43%	48%	52%	46%	51%	45%	49%	50%	47%	45%
Stayed in a hotel	33% ↓	53%	53%	41%	53%	41%	49%	51%	45%	42%
Consumer/Trade Show	35%	46%	39%	26% ↓	54% ↑	46%	39%	42%	38%	44%
Travel to another city/town in Alberta	34%	36%	46%	34%	43%	33%	41%	45%	38%	29%
Craft fair/local market	30%	38%	37%	34%	37%	38%	34%	36%	36%	31%
Local attractions (Telus Spark, Calgary Zoo, etc.)	32%	31%	41%	33%	36%	37%	33%	34%	37%	29%
Movie in a theatre	27%	29%	32%	25%	36%	29%	29%	32%	28%	24%
Nightclub with music/dancing	23%	22%	50%	27%	29%	25%	26%	15%	33%	28%
Kids play centres	24%	20%	57%	23%	32%	22%	38%	41%	11%	33%
Lounge/bar	23%	24%	21%	24%	22%	25%	21%	25%	19%	27%
Shopping at a mall	26%	12%	24%	17%	25%	16%	22%	20%	21%	21%
Streaming movies, TV or other content	67%	50%	50%	43%	57%	40%	56%	50%	50%	60%

Edmonton: More Willing to Participate in Arts & Culture

Stone—Olafson

	Age			Gender		Kids @ Home		HH Income - COVID		
% Selected	18 to 34	35 to 54	55+	Female	Male	Yes	No	Decreased	Unchanged	Increased
Music or performance lesson - solo	63%	38%	20%	50%	44%	40%	44%	50%	36%	50%
Outdoor festival (such as Ice on Whyte, etc.)	38%	44%	43%	43%	43%	37%	43%	42%	42%	39%
Arts class, workshop or rehearsal	48%	31%	25%	35%	41%	33%	36%	31%	36%	43%
Visit public library	32%	36%	38%	36%	38%	33%	36%	27%	41%	39%
Live music /concert - medium venue	36%	35%	30%	27%	43%	20%	38%	34%	33%	36%
Other live performances (such as comedy, etc.)	22%	34%	45%	25%	42%	26%	35%	25%	43%	22%
Live dance performances	11%	42%	46%	26%	45%	33%	32%	30%	30%	44%
Live theatre performances	25%	38%	33%	31%	38%	33%	32%	32%	34%	26%
Live music / concert at a large venue	30%	33%	31%	23% ↓	42% ↑	26%	33%	30%	36%	22%
Recitals / performances in your community	38%	28%	30%	37%	25%	36%	27%	32%	26%	38%
Museums	36%	28%	25%	25%	37%	34%	28%	30%	31%	22%
Live music /concert at a small venue/nightclub	30%	22%	39%	32%	27%	22%	31%	22%	35%	33%
Indoor festivals or exhibits	35%	25%	22%	29%	29%	31%	27%	22%	32%	32%
Art galleries or art shows	33%	28%	23%	28%	32%	40%	24%	23%	31%	33%
Music or performance lesson – group	27%	14%	33%	28%	22%	11%	32%	38%	13%	14%
Spent time creating personally	25%	18%	30%	45% ↑	4% ↓	25%	23%	12%	29%	31%

Edmonton: More Willing to Participate in Active Experiences

Stone — Olafson

	Age			Gender		Kids @ Home		HH Income - COVID		
% Selected	18 to 34	35 to 54	55+	Female	Male	Yes	No	Decreased	Unchanged	Increased
Running/walking outdoors	41%	54%	67%	59%	54%	63%	51%	55%	60%	29%
Hiking/X- skiing/snowshoeing in Edmonton	58%	44%	53%	52%	54%	50%	52%	57%	50%	45%
Hiking/X- skiing/snowshoeing outside Edmonton	54%	48%	44%	49%	52%	54%	48%	42%	52%	60%
Skating outdoors	48%	47%	38%	36%	60%	46%	47%	38%	50%	56%
Biking outdoors	30%	38%	54%	45%	32%	38%	39%	40%	46%	22%
Attended an amateur sports event/activity	27%	26%	58%	37%	36%	29%	41%	40%	47%	8%
Visited a large rec centre/fitness facility	28%	41%	33%	30%	41%	31%	36%	35%	36%	30%
Went down-hill skiing	32%	35%	33%	31%	38%	35%	32%	37%	35%	25%
Attended a youth sports event	67%	21%	38%	28%	35%	40%	27%	44%	35%	0%
Went to a swimming pool	33%	26%	33%	28%	36%	38%	26%	27%	39%	18%
Visited a small fitness gym/studio	27%	33%	29%	27%	32%	30%	29%	30%	26%	38%
Attended other pro sports	35%	29%	7%	18%	36%	27%	28%	32%	29%	18%
Skating indoors	39%	21%	0%	25%	25%	37%	17%	18%	44%	10%
Participated in an organized sports league	21%	30%	29%	9%	30%	21%	27%	40%	14%	14%
Edmonton Oilers game at Rogers Place	25%	28%	18%	24%	24%	21%	25%	24%	27%	15%
Attended a group fitness class	22%	21%	24%	22%	25%	25%	21%	17%	26%	25%
Worked out with a trainer/one-on-one fitness	29%	25%	0%	25%	15%	17%	21%	27%	9%	33%

Edmonton: More Willing to Participate in Community Activities

Stone — Olafson

	Age			Gender		Kids @ Home		HH Income - COVID		
% Selected	18 to 34	35 to 54	55+	Female	Male	Yes	No	Decreased	Unchanged	Increased
Travel outside of Canada	52%	38%	39%	36%	51%	33%	46%	44%	41%	44%
Travel to another city/town in Canada	35%	39%	46%	38%	42%	37%	41%	36%	47%	29%
Travel to another city/town in Alberta	31%	35%	45%	34%	41%	31%	39%	38%	38%	33%
Stayed in a hotel	38%	33%	40%	32%	43%	39%	36%	34%	43%	28%
Consumer/Trade Show	34%	36%	36%	30%	42%	31%	37%	40%	38%	11%
Kids play centres	36%	29%	57%	30%	40%	35%	33%	40%	35%	17%
Craft fair/local market	31%	38%	25%	30%	35%	26%	33%	30%	35%	26%
Movie in a theatre	34%	27%	31%	21% ↓	41% ↑	32%	30%	34%	30%	25%
Local attractions	31%	31%	28%	24%	38%	38%	27%	28%	37%	18%
Nightclub with music/dancing	25%	31%	42%	28%	33%	21%	30%	33%	31%	19%
Streaming movies, TV or other content	33%	8%	43%	20%	41%	10%	36%	13%	43%	40%
Shopping at a mall	23%	29%	25%	23%	30%	30%	25%	31%	28%	4%
Lounge/bar	21%	18%	17%	14%	24%	14%	21%	22%	19%	9%

Stone Olafson

Understanding people. It’s what we do.