

# The NEW Experience Economy:

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

Phase 6 Results: Edmonton

July 2021

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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 more than a year into the pandemic, restrictions are shifting again along with the availability of experiences for Edmontonians. 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 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 494 Edmonton - specific surveys were collected (334 from main sample, 160 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:

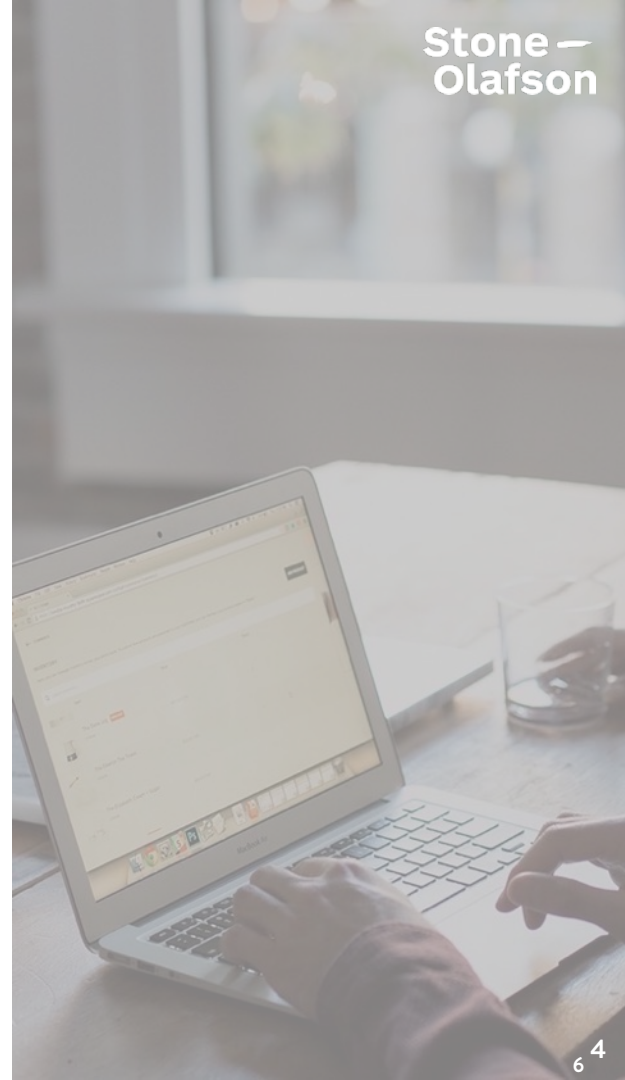
[www.stone-olafson.com/insights](http://www.stone-olafson.com/insights)

*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.*



## Edmontonians continue to closely mimic their fellow Albertans, but with more caution, 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. More than other regions, the majority of Edmontonians fall into the middle comfort group with feelings of cautious optimism.

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

2.

### Edmontonians will return at a slower pace than Albertans

While comfort and risk make progress, Edmontonians have a greater hesitation to fully return. Many have a "wait and see" mentality.

Organizations should keep in mind that the city may see a slower pace of return than other regions in Alberta. More audiences will want similar programming that was offered during the pandemic or similar organizational elements (e.g. flexibility, masks, safety messages) while a smaller proportion are ready to return in-person.

3.

### Spending habits are markedly different

The shift in spending habits is slightly more prominent in Edmonton. 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 Edmontonians will spend, at least in the short term. Providing flexibility allows for Edmontonians to suss out how they want to direct their time and spending.



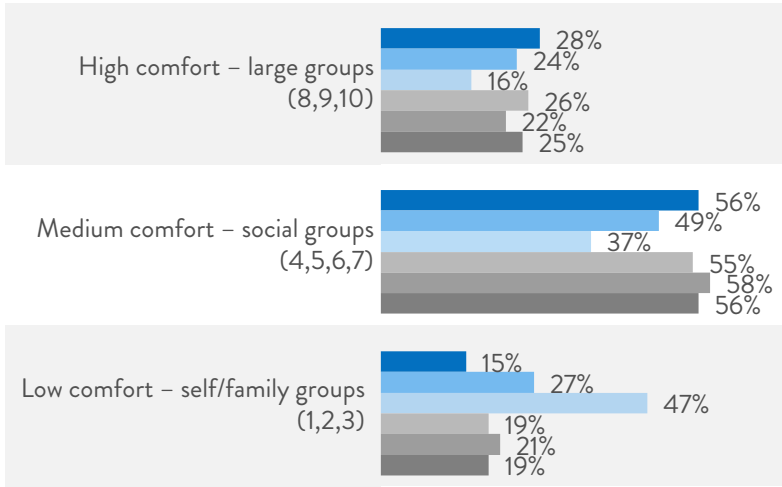
# Comfort levels, risk tolerance, and consumer mindset



# Comfort and risk tolerance are on the rise

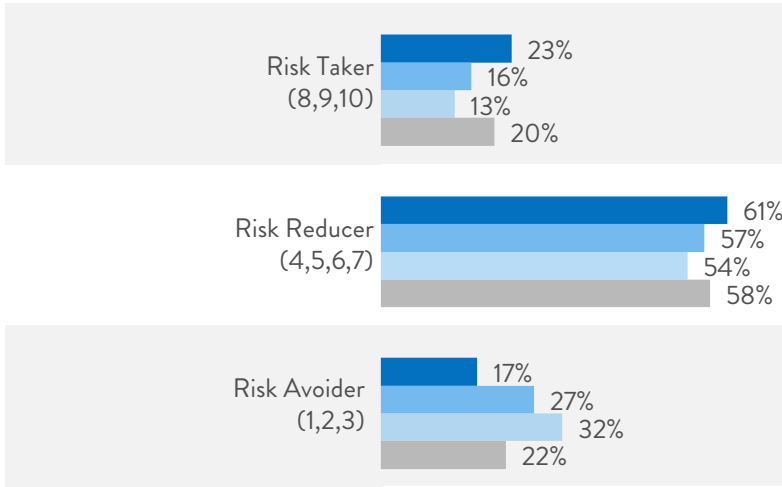
Most notably in Edmonton is the soft shift to high comfort and risk. While the low category is decreasing, Edmontonians mostly sit in the middle for comfort and risk.

**Comfort Level**



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

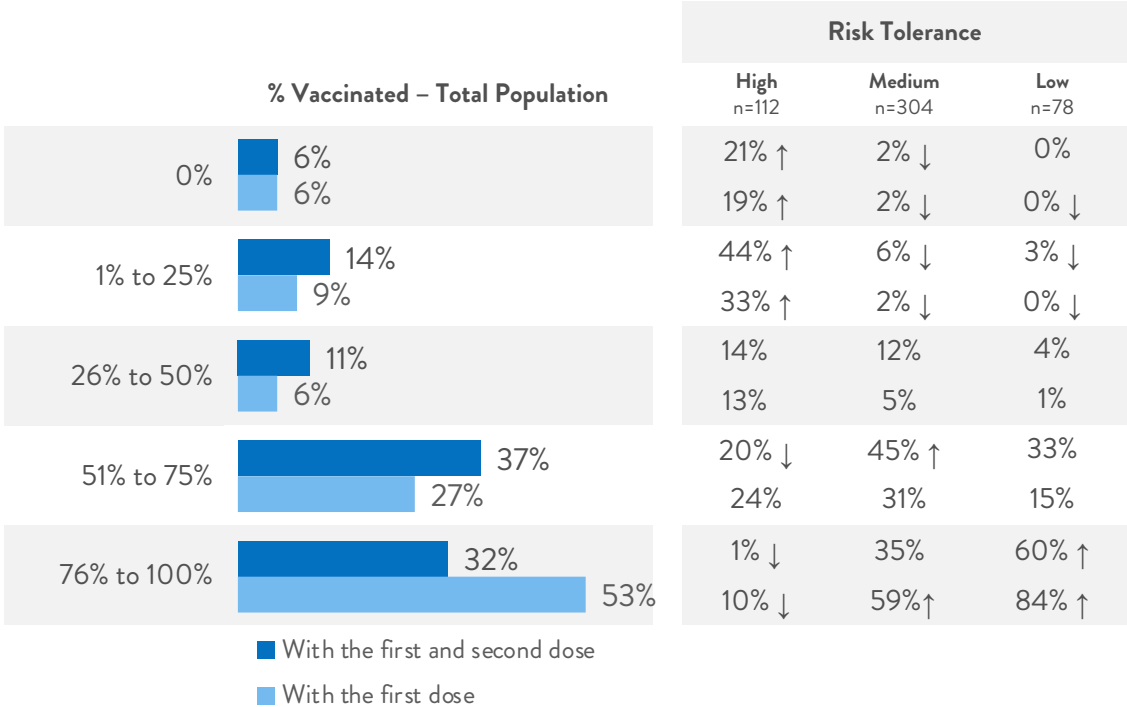
**Risk Tolerance**



Jul 2021 Mar 2021 Dec 2020 Oct 2020

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: Edmonton (n=494)

# Vaccinations remain a key component to increasing comfort levels



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 sample (n=494)



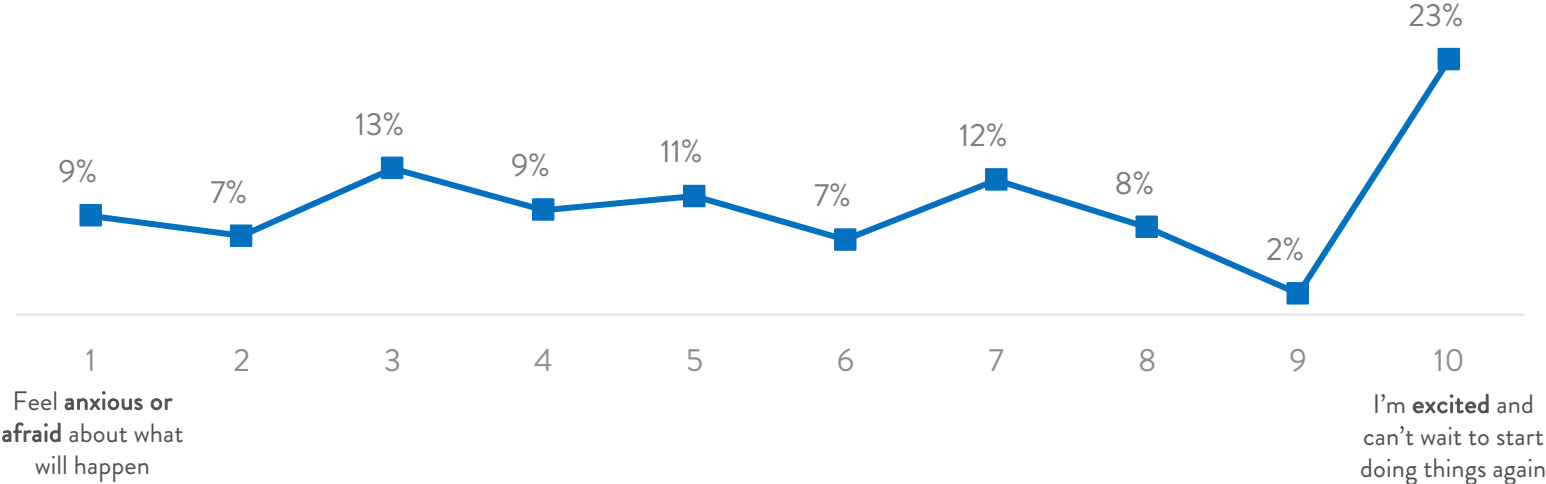
How do Edmontonians feel  
about re-opening?

Yukon

EDMONTON CANOE

# Feelings towards re-opening vary but Edmonton has the smallest proportion who are excited and eager to engage

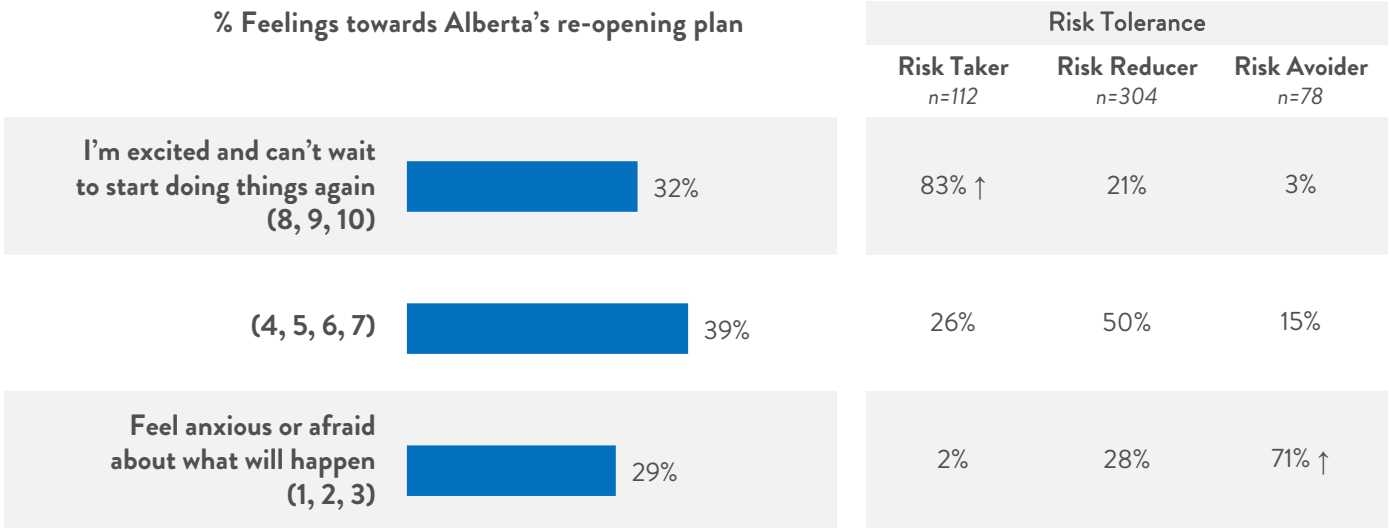
% Feelings towards Alberta's re-opening plan



Alberta recently announced its plan for re-opening in time for summer. How do you feel about it?  
Base: Edmonton sample (n=494)

# Excitement towards re-opening directly aligns with risk tolerance

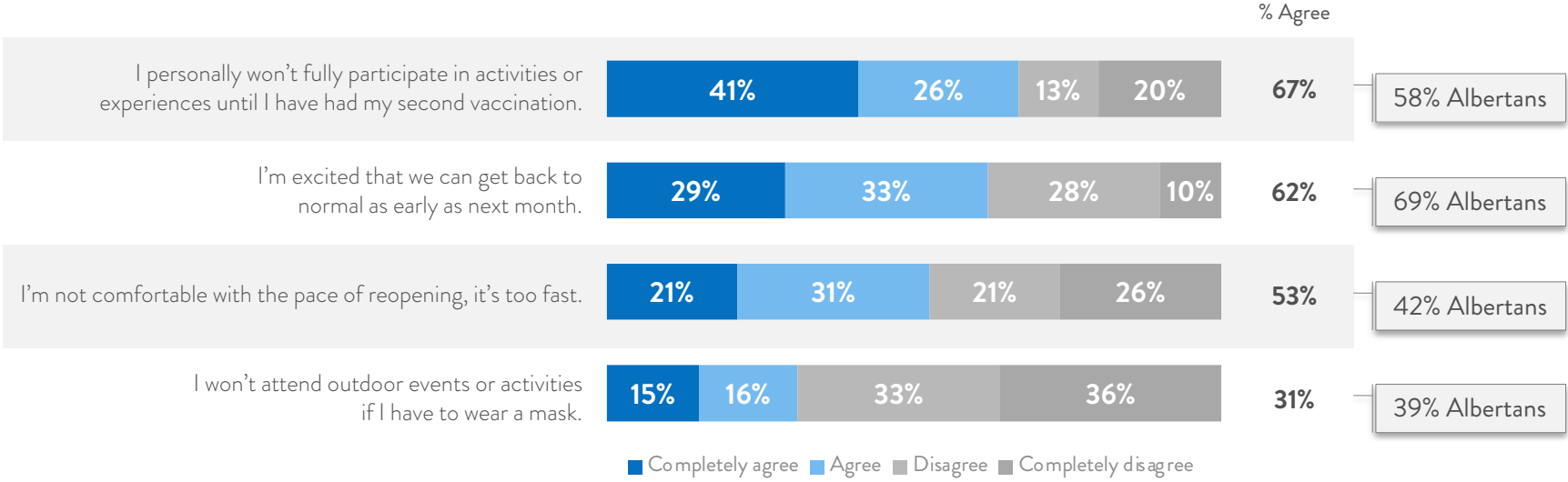
There is greater polarization in how Edmontonians feel about re-opening, with the highest proportion who are anxious or afraid. A reminder for organizations to identify where their audience sits in terms of risk, and it may look different than the rest of the province.



Alberta recently announced its plan for re-opening in time for summer. How do you feel about it?  
Base: Edmonton sample (n=494)

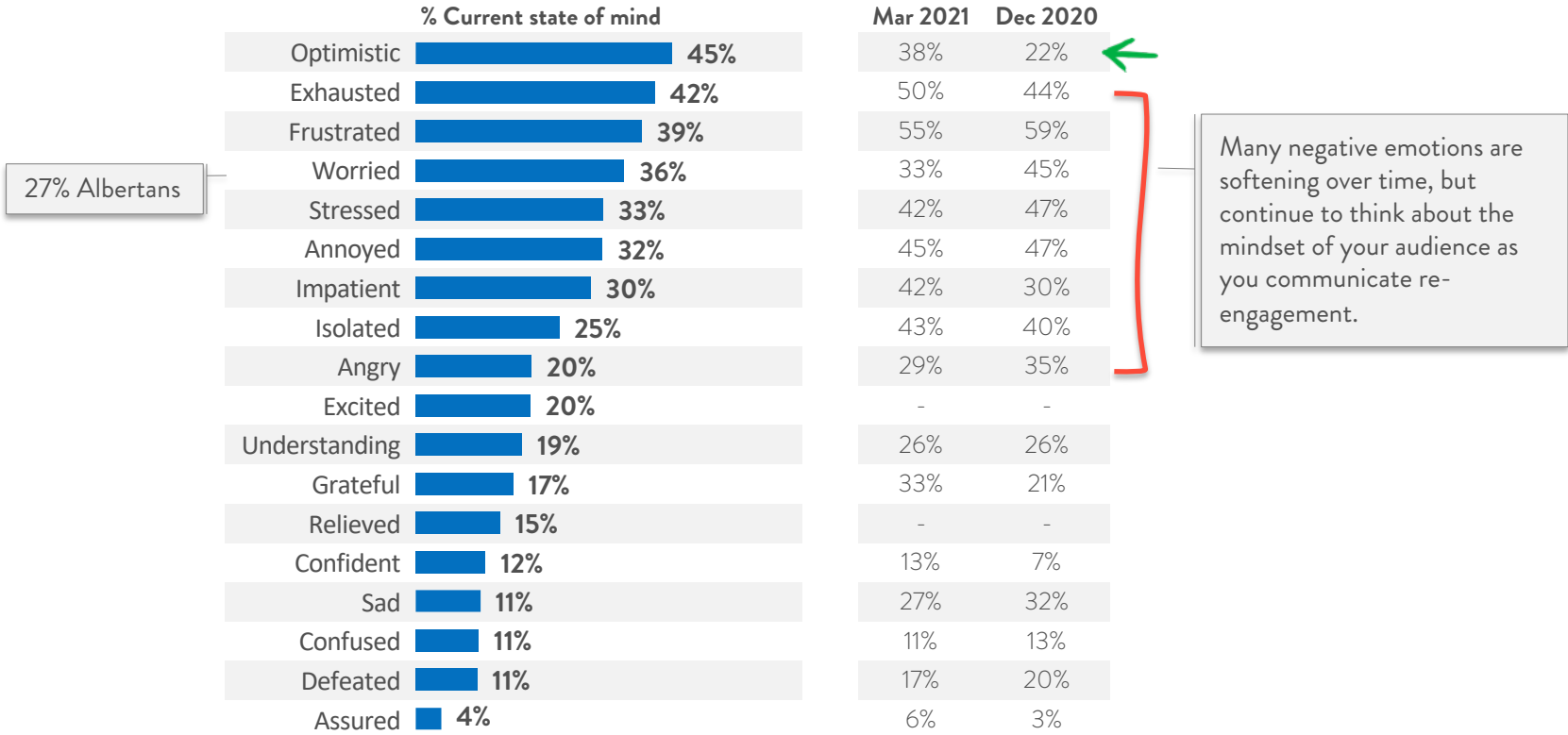
# While Albertans feel a cautious excitement with restrictions loosening, Edmontonians remain wary

Edmontonians are the most cautious of all regions in Alberta, which will likely be reflected in the pace that they return to activity and experiences.



Below are a few statements about the pandemic, please review and tell us if you agree or disagree with each one.  
Base: Edmonton sample (n=494)

# Optimism is growing but negative emotions, especially worry, are present



What words describe how you might be feeling right now? Please select all that apply.  
Base: Edmonton sample (n=494)

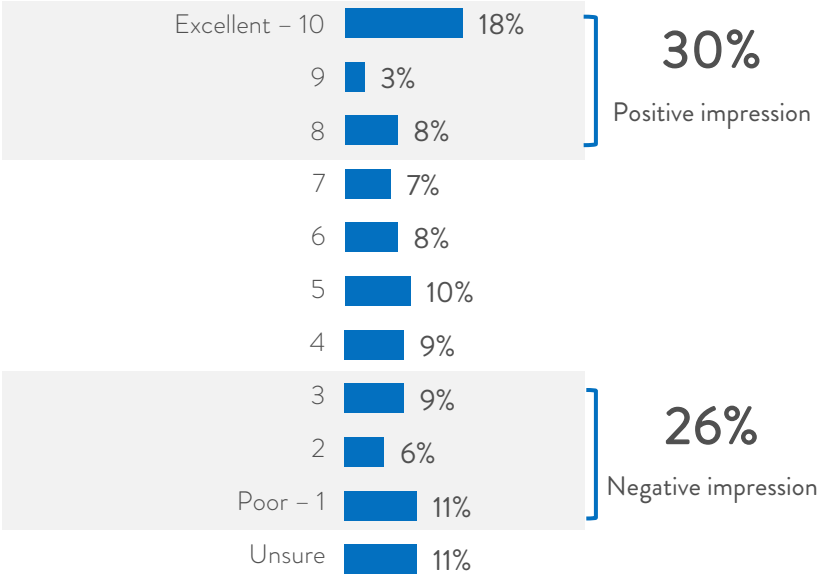
# The majority understand that organizations need to re-open even if participants aren't fully ready

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

**55%**  
 AGREE  
 (26% strongly agree + 29% agree)

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

% Impression of organizations preparing for summer





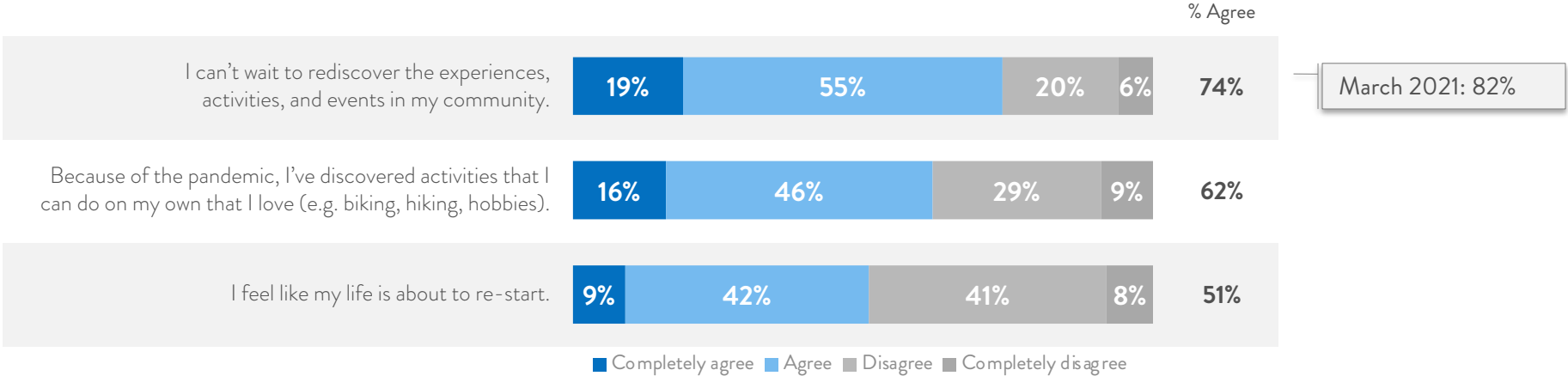


# Consideration for engagement and barriers to address



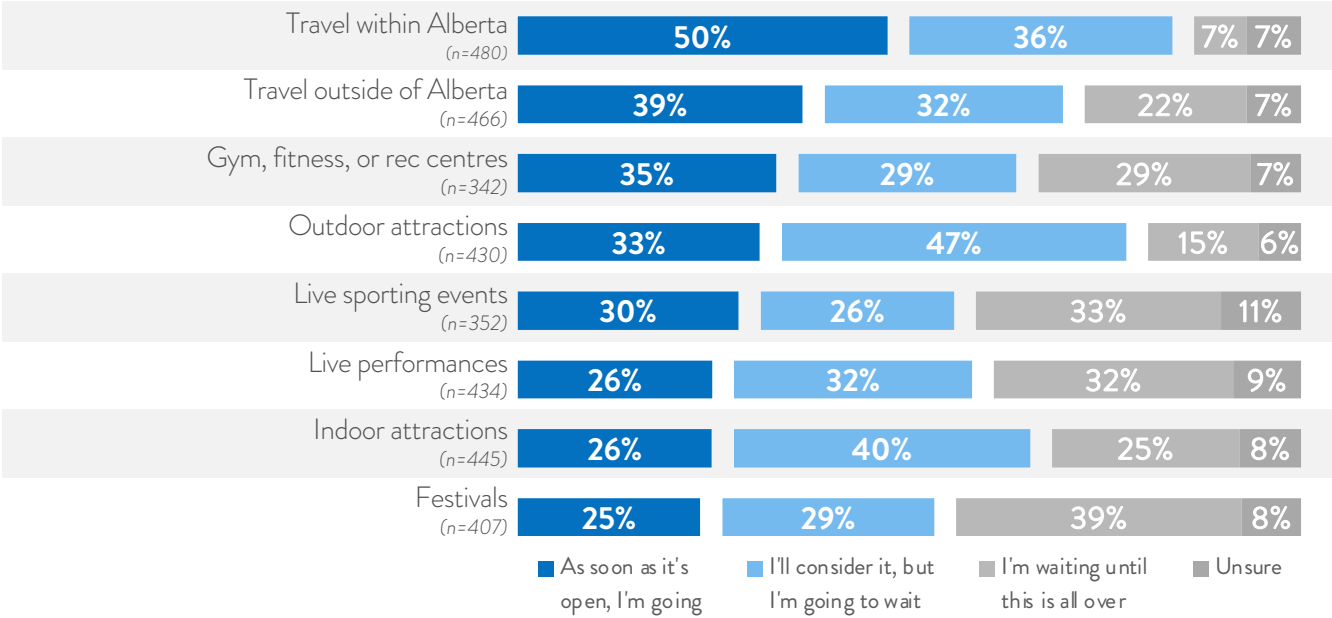
# Edmontonians will balance between rediscovering old and continuing new

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



# Pent-up demand is highest for travel but immediate return is lowest in Edmonton compared to the rest of the province

% Consideration (Among those who participate)

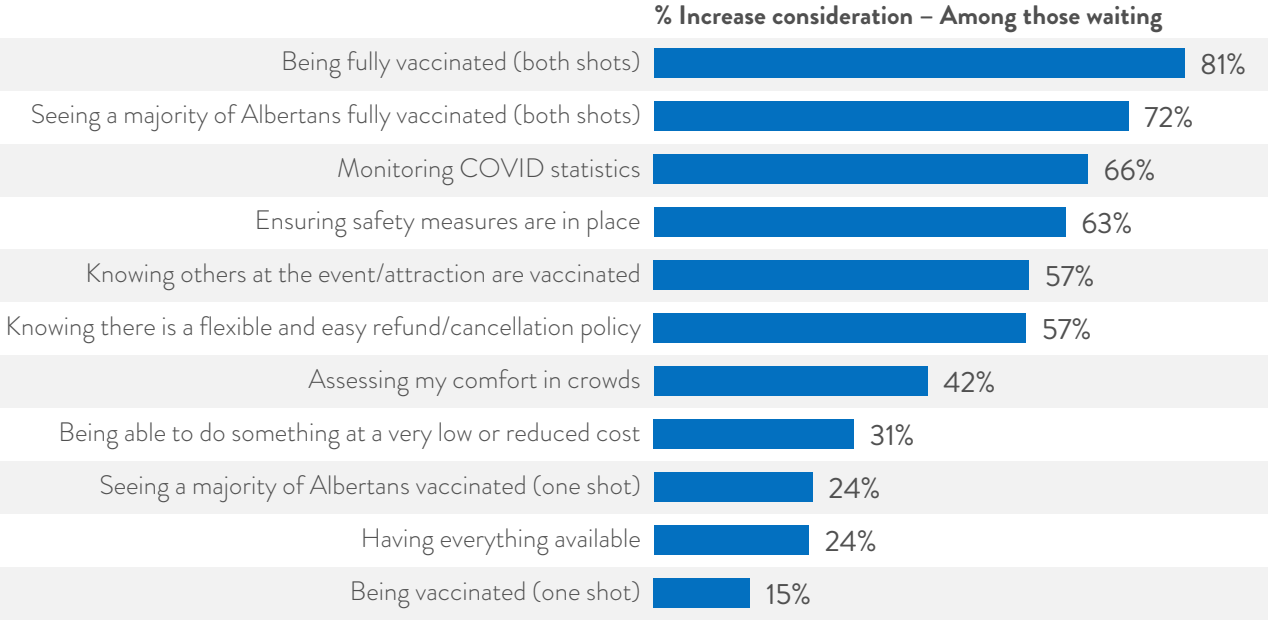


Thinking about the activities that you normally enjoy, assuming restrictions are coming off as planned and some health measures or safety measures will be in place, when will you consider doing those activities again?

Base: Main sample, those interested in each activity (n varies)

# So what do cautious Edmontonians need to see to increase participation?

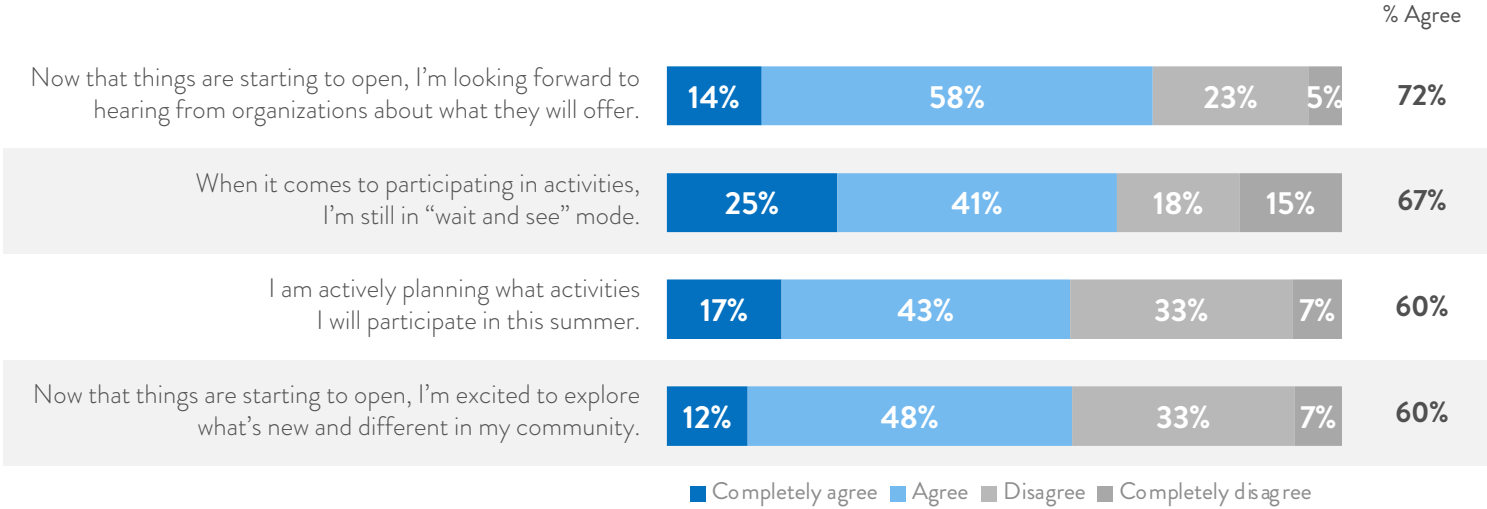
Across the province, the need to monitor statistics (vaccine levels, caseloads) is still most important to enhance consideration. However, messaging that communicates safety and flexibility remains important and organizations will likely need to build these messages into long-term communication plans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

# Edmontonians want to hear directly from organizations

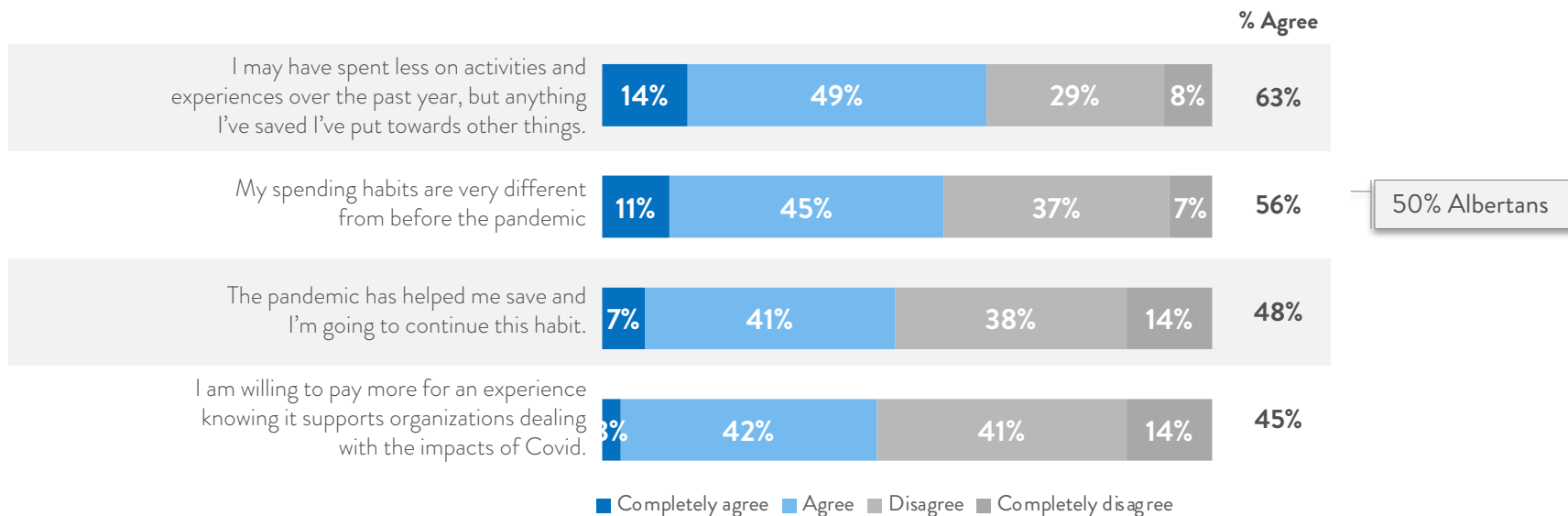


A photograph of two women at a counter. The woman on the right is wearing a grey sweater and is touching a white tablet mounted on a stand. The woman on the left is wearing a light-colored sweater and is holding a smartphone. The counter is white and has a white payment terminal. The background is a bright, modern interior with a plant and some products on a shelf.

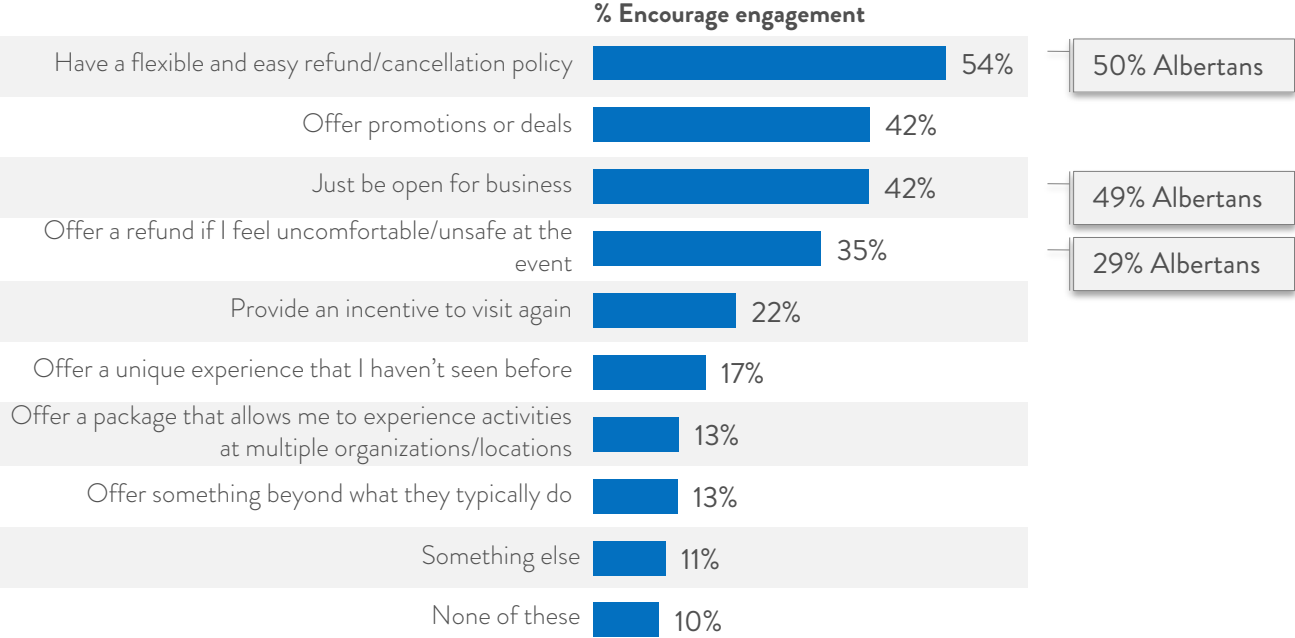
# Spending habits and messaging opportunities

# Spending habits have changed for Edmontonians

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



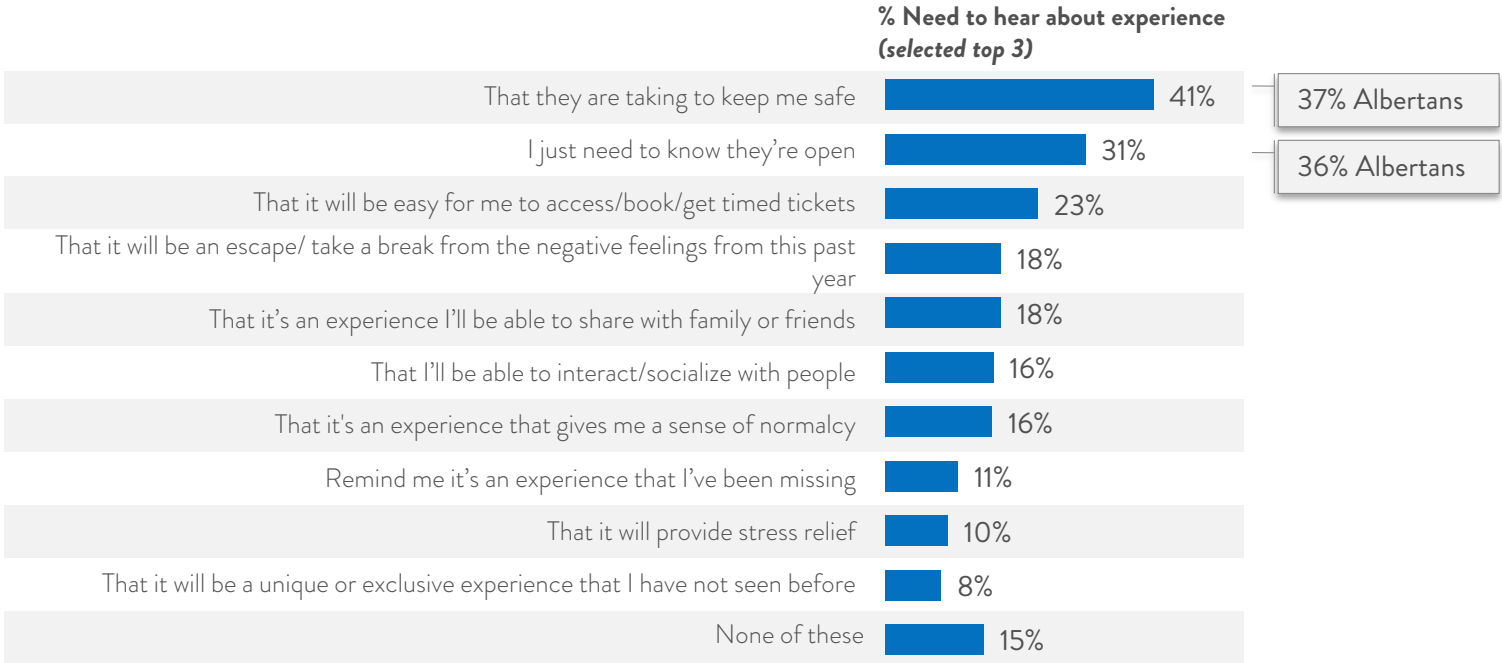
# A cautious return is more apparent in city centres with the increase in flexible options compared to rural Alberta



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: Edmonton sample (n=494)



# But safety continues to be a key message, more so in Edmonton



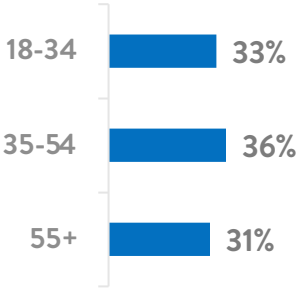
What can organizations say to you about the experiences they offer, in order to encourage you to participate or attend? Please select the top three.  
Base: Edmonton sample (n=494)

# Respondent Profile

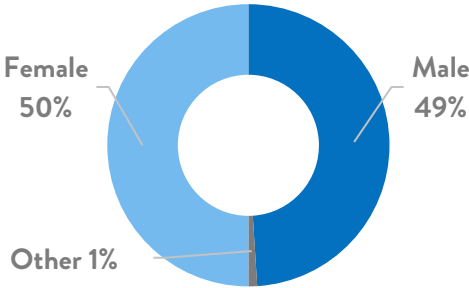


# Who We Heard From (Edmonton)

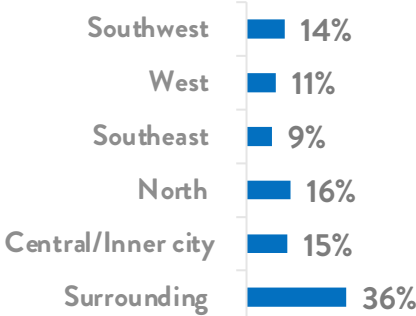
## Age



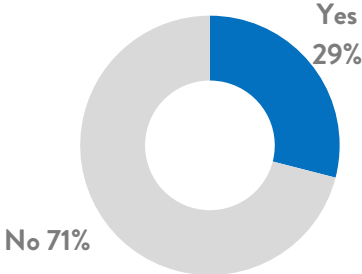
## Gender



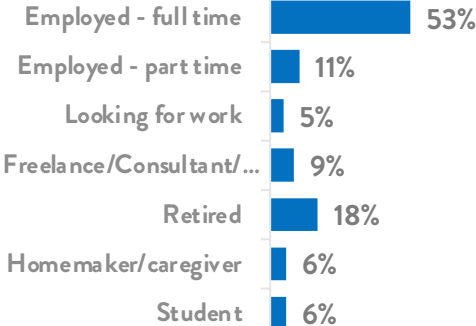
## Location



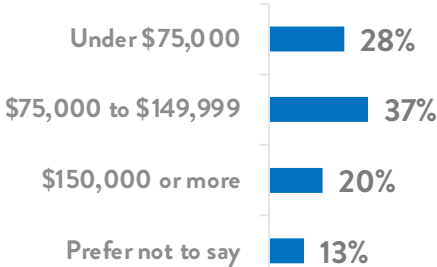
## Children in the Household



## Employment

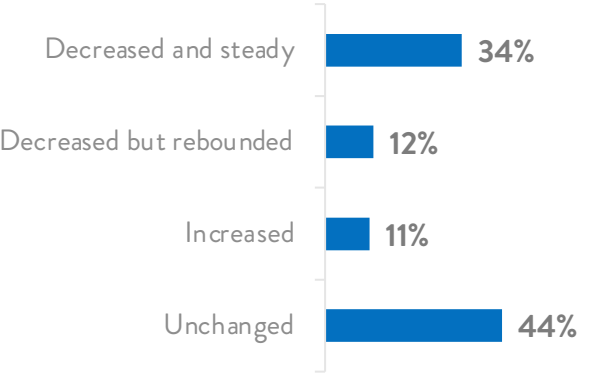


## Household Income

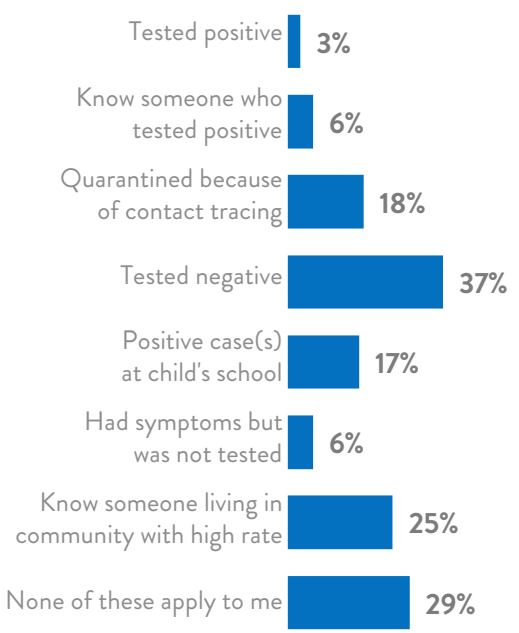


# Who We Heard From (Edmonton)

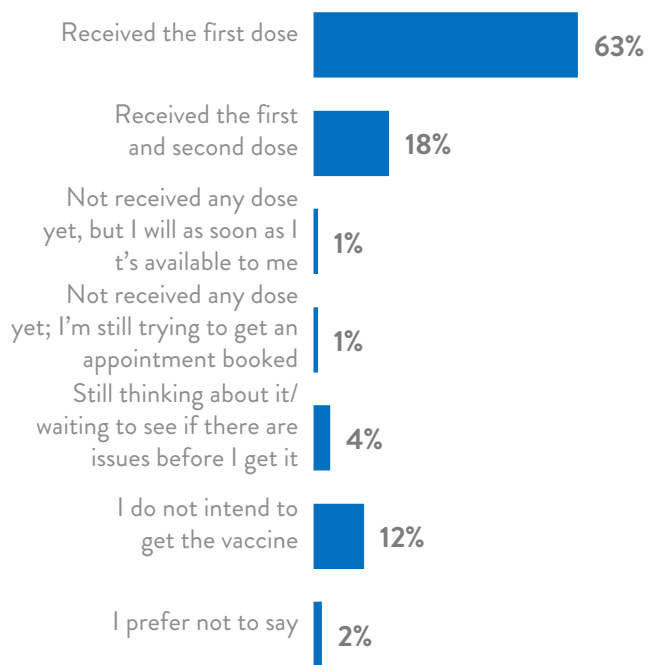
## Income Changes (COVID)



## Connection to COVID



## Vaccination Status



Base: Edmonton sample (n=494)

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Olafson**

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