

October 7th, 2020

Returning to Events

Presented by:
MQO Research



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- MQO is part of the **m5 Group of companies**, which also includes **m5 Marketing Communications** - a full-service, integrated marketing agency with over 35 years of experience and more than 120 employees, making it the region's largest marketing agency.

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SESSION GOAL

Share insights on public sentiment around event confidence and travel intentions to provide context for planning.

CONTEXT

Atlantic Canada is open for business but getting 'back to normal' is not an option.

- Atlantic Canada continues to keep Covid-19 at bay
- Atlantic Canadian mindsets have changed
- Quarantine rules have limited travel
- Gathering limits and other health regulations create new challenges for events
- Opportunities to find new audiences, step in to fill gaps in entertainment and travel

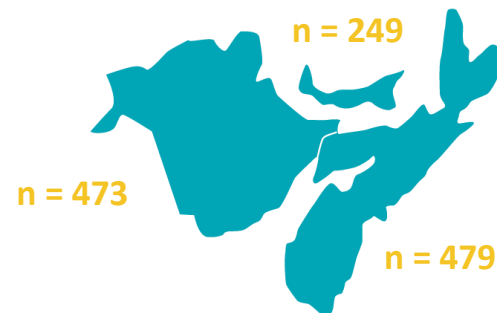
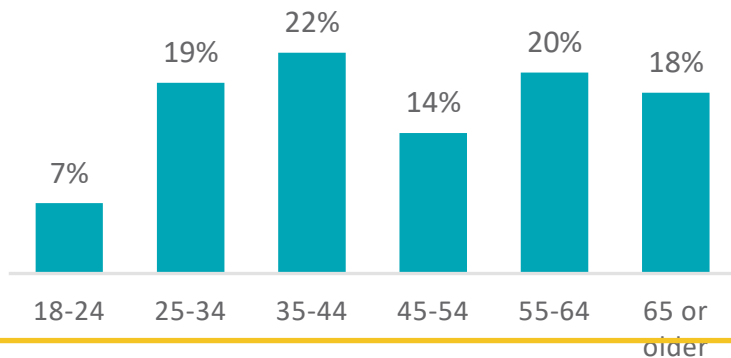


THE EVENT CONFIDENCE SURVEY

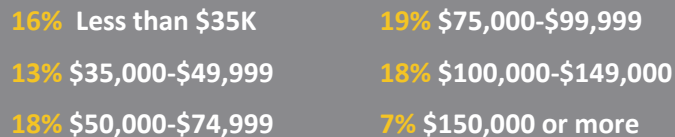
Data was collected online between May 28th and June 9th, 2020.

N=1200 responses were collected in total.

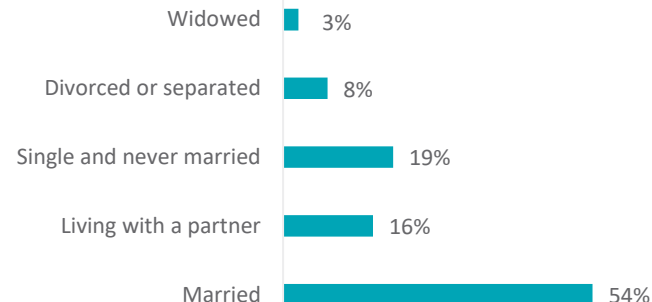
AGE BREAKDOWN



HOUSEHOLD INCOME



Marital Status



EVENT CONFIDENCE

Prior to COVID-19, the majority of Maritime residents (59%) attended public events between two to six times per year.

EVENT CONFIDENCE

‘Fewer Atlantic Canadians are willing to attend large events.’

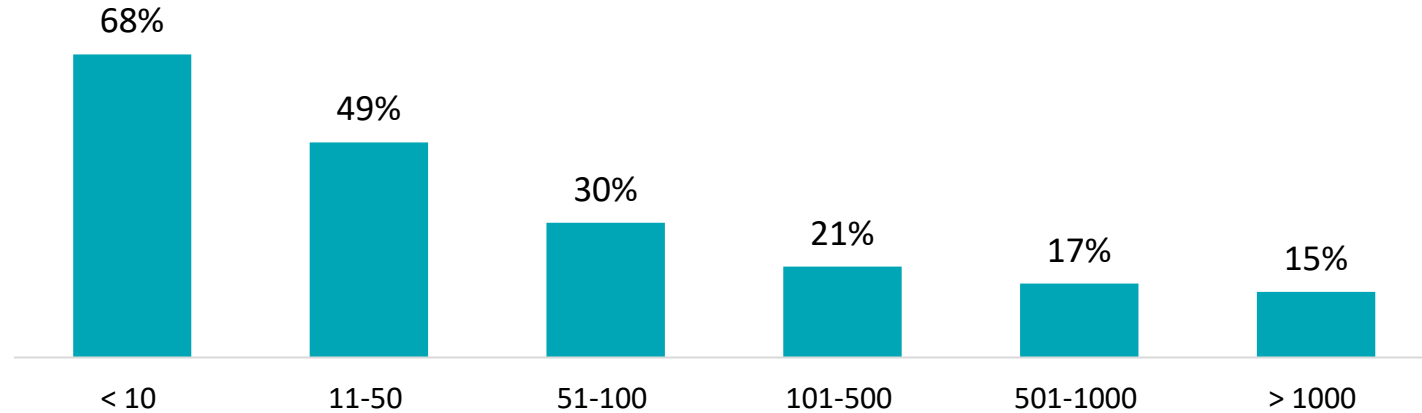
Prior to COVID-19, **75%** of Maritime event goers were either *very likely* or *likely* to attend a large public event of 100+ attendees.

As restrictions on large gatherings lift...

- **51%** are *likely* to attend a public event (e.g., cultural or music event)
- **41%** are very likely or likely to attend a sporting event

EVENT CONFIDENCE

Atlantic Canadians continue to be more comfortable with the idea of attending smaller events.



% of event goers who are comfortable with events of varying size

EVENT CONFIDENCE

Event goers are more likely to attend an event outdoors than indoors.



74%

of event goers are *likely* or *very likely* to attend an event held **outdoors**



44%

of event goers are *likely* or *very likely* to attend an event held **indoors**



42%

of event goers are *likely* or *very likely* to attend an event held in **an arena**



38%

of event goers are *likely* or *very likely* to attend an event held in a **convention centre**



30%

of event goers are *likely* or *very likely* to attend an event held in a **bar**

EVENT CONFIDENCE



‘Activities that Atlantic Canadians are comfortable with are generally outdoor activities where social distancing might be maintained.’

EVENT CONFIDENCE

70% of Atlantic Canadians will consider travelling for an event **within their local community** in 2020.

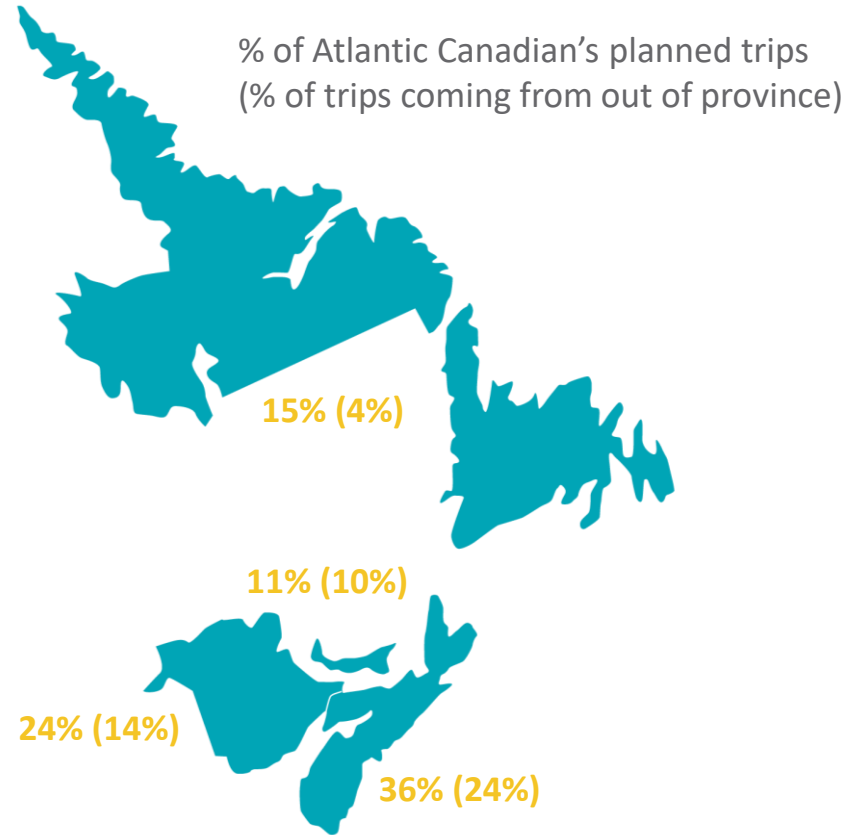
59% of Atlantic Canadians will consider travelling for an event **within a few hours drive from their community** in 2020.

43% are open to travelling **more than a few hours drive from their community** to attend an event in 2020.

TRAVEL INTENTIONS

TRAVEL INTENTION

Atlantic Canada is the destination for 14% of planned trips from Southern Ontario and Quebec travelers.



TRAVEL INTENTION

77%

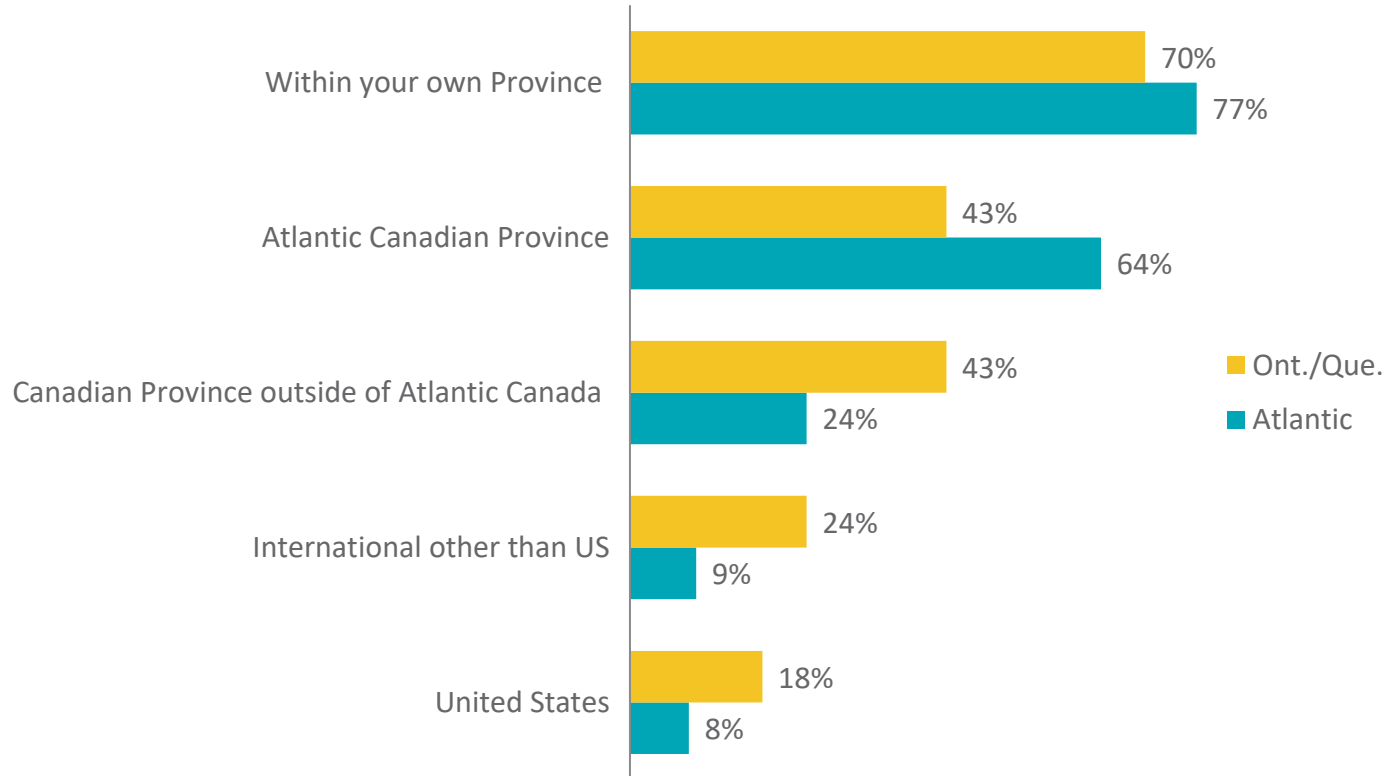
of Atlantic Canadian travelers indicated that they are likely to travel within their own province in 2021, even if no vaccine is available.

64%

of Atlantic Canadian travelers are likely to travel to Atlantic Canadian provinces outside of their home province in 2021, even if no vaccine is available.

TRAVEL INTENTION

Likely to travel in Spring/Summer 2021 travel if no vaccine is available



Atlantic tourism study: <https://www.tiapei.pe.ca/news/atlantic-canada-tourism-study/>

TRAVEL INTENTION

32% are *very likely* or *likely* to consider travelling for an event **in another Atlantic Canadian province** in 2020.

However, just one-quarter (25%) are *very likely* or *likely* to consider travelling for an event **to another province (not Atlantic Canada)** in 2020.

TRAVEL INTENTION

16% are *very likely* or *likely* to consider travelling for an event **in the United States** in 2020.

Even fewer people (14%) are *very likely* or *likely* to consider travelling for an event **to another country (outside the US)** in 2020.

TRAVEL INTENTION

90%

The number of COVID-19 cases in an area would influence my choice of travel destination.

62%

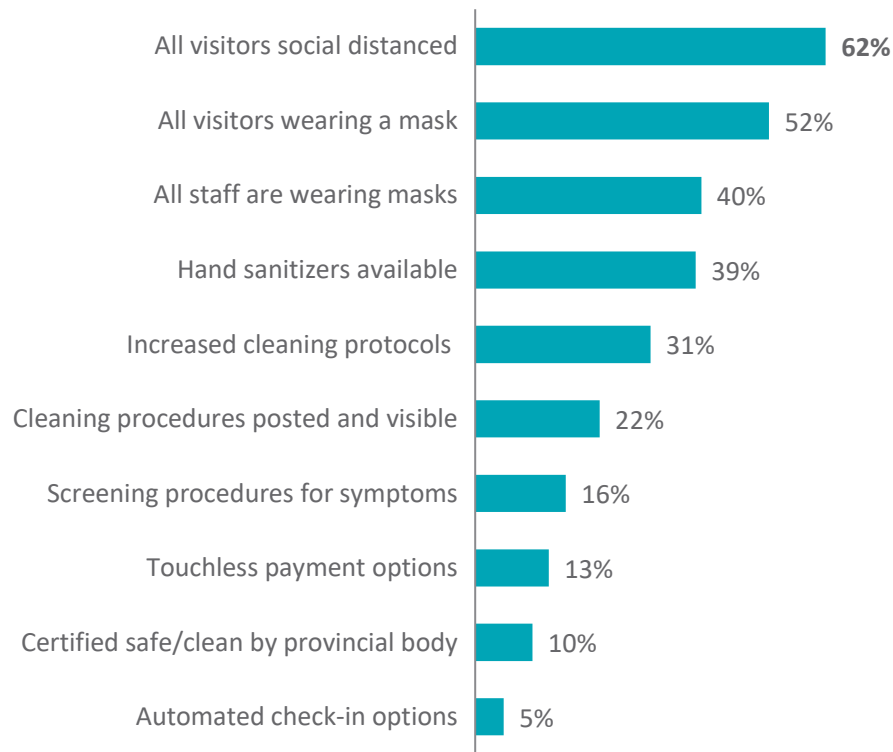
I am more likely to explore a place where wearing a mask is mandatory.

PUBLIC SENTIMENT: HEALTH & SAFETY

Atlantic Canadians continue to be concerned about health and safety measures and the possibility of contracting COVID-19 while traveling.

PUBLIC SENTIMENT: HEALTH & SAFETY

Top 3 Most Important Health/Safety Measures



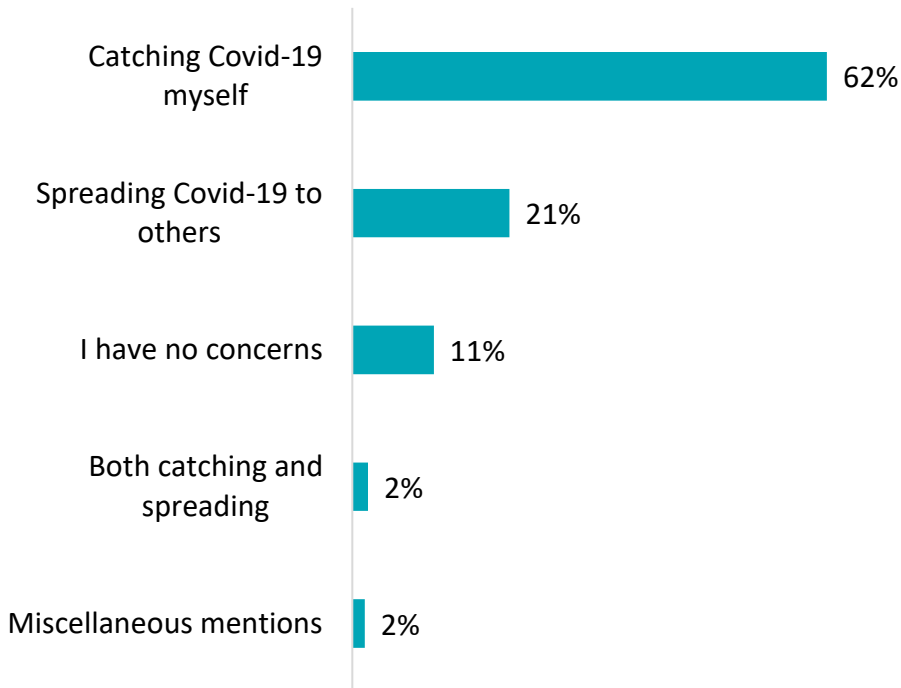
Social distancing remains one of the most important health and safety measures that Atlantic Canadians would like to see when travelling in the remained or 2020.

The primary concern with regards to attending events is catching the virus itself.

21% are also concerned with potentially spreading COVID-19 to others, while 11% have no concerns.

PUBLIC SENTIMENT: HEALTH & SAFETY

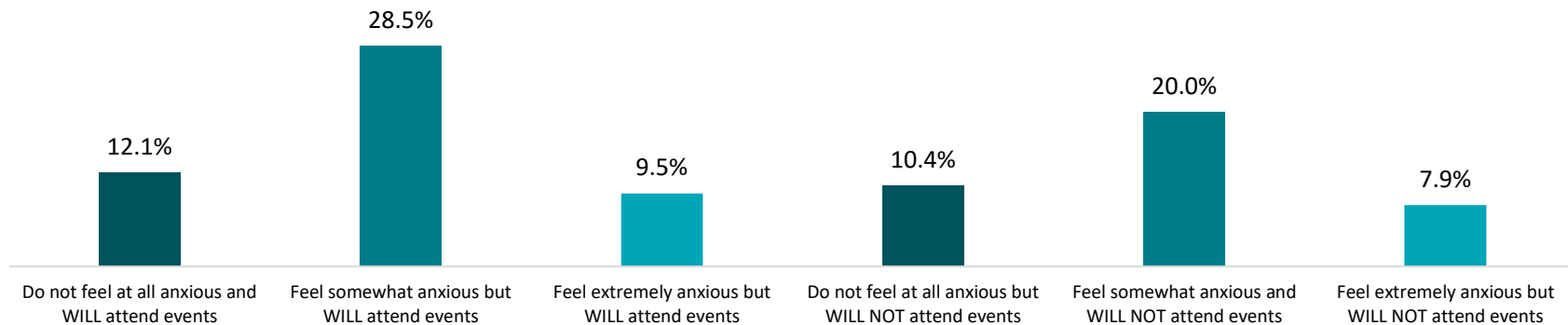
What are you most concerned about in attending events?



ATTENDING EVENTS – WINTER 2020-21

- Do not feel anxious (22.6%): 12.1% **will** attend events this winter in their province; 10.4% **will not**.
- Feel somewhat anxious (48.5%): 28.5% **will** attend events this winter in their province; 20.0% **will not**.
- Feel extremely anxious (17.4%): 9.5% **will** attend events this winter in their province; 7.9% **will not**.

If vaccines are still not widely available, how will you feel about attending events in your own province in Winter of 2021?

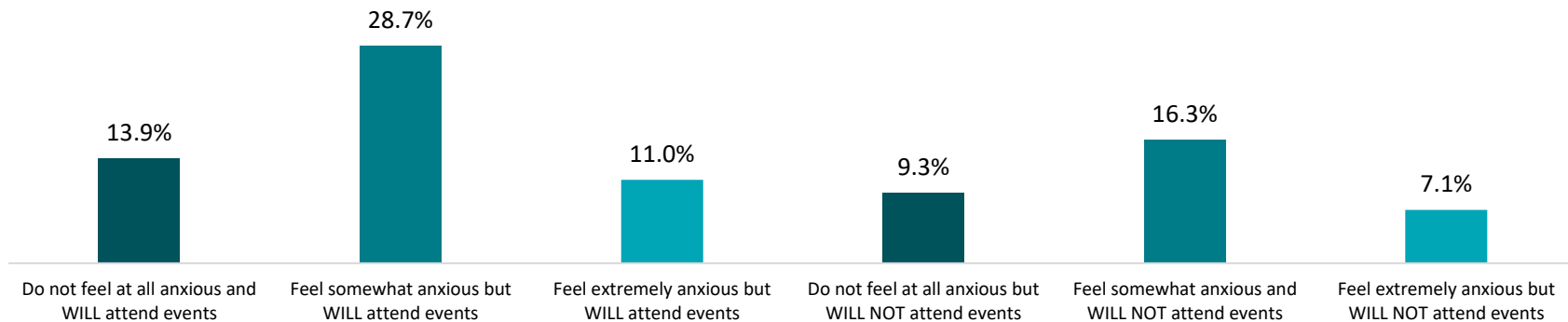


11.2% said 'Don't know' and 0.4% said 'Prefer not to say'.

ATTENDING EVENTS – SPRING 2021 (OWN PROVINCE)

- Do not feel anxious (23.1%): 13.9% **will** attend events in Spring 2021 in their province; 9.3% **will not**.
- Feel somewhat anxious (45.0%): 28.7% **will** attend events in Spring 2021 in their province; 16.3% **will not**.
- Feel extremely anxious (18.1%): 11.0% **will** attend events in Spring 2021 in their province; 7.1% **will not**.

If vaccines are still not widely available, how will you feel about attending events in your own province in the Spring 2021?

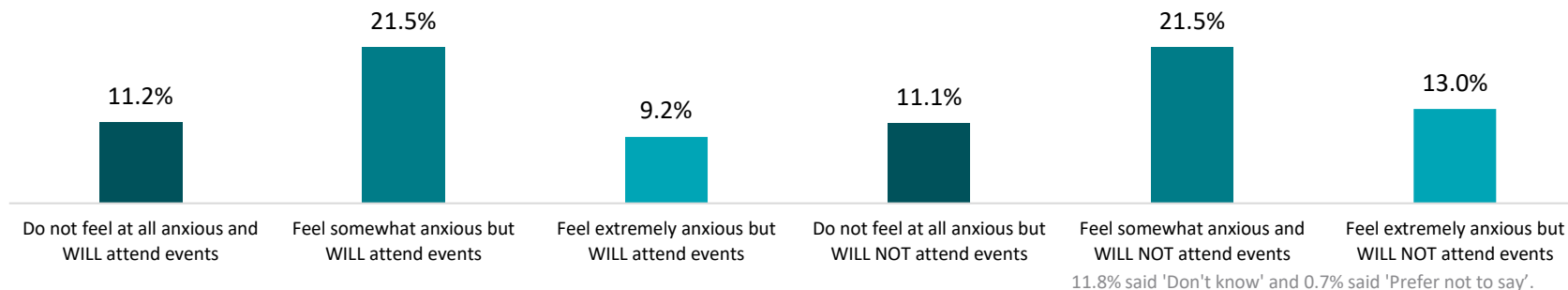


13.1% said 'Don't know' and 0.6% said 'Prefer not to say'.

ATTENDING EVENTS – SPRING 2021 (OTHER PROVINCE)

- Do not feel anxious (22.3%): 11.2% **will** attend events in Spring 2021 in another Atlantic province; 11.1% **will not**.
- Feel somewhat anxious (43.0%): 21.5% **will** attend events in Spring 2021 in another Atlantic province; 21.5% **will not**.
- Feel extremely anxious (22.2%): 9.2% **will** attend events in Spring 2021 in another Atlantic province; 13.0% **will not**.

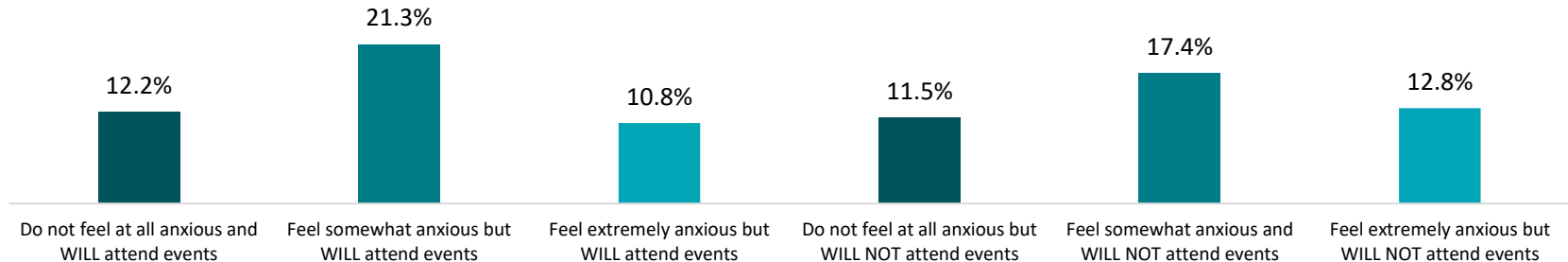
If vaccines are still not widely available, how will you feel about attending events in Atlantic Canada outside your province in Spring 2021?



ATTENDING EVENTS – FALL 2021

- Do not feel anxious (23.7%): 12.2% **will** attend events next fall in another Atlantic province; 11.5% **will not**.
- Feel somewhat anxious (38.7%): 21.3% **will** attend events next fall in another Atlantic province; 17.4% **will not**.
- Feel extremely anxious (23.5%): 10.8% **will** attend events next fall in another Atlantic province; 12.8% **will not**.

If vaccines are still not widely available, how will you feel about attending events in Atlantic Canada outside your province in the Fall of 2021?



13.5% said 'Don't know' and 0.5% said 'Prefer not to say'.

CONCLUSIONS & RECOMMENDATIONS

KEY TAKEAWAYS

Between 40% and 50% of event goers state they are likely to attend either sporting or music/cultural events once restrictions on large gatherings are lifted.

The likelihood of attending these events *decreases* with age.

KEY TAKEAWAYS

People are most comfortable with small gatherings, but there is some degree of openness to events of up to 100 people.

In 2020, people are more open to attending **outdoor events** compared to indoor events, particularly when the group sizes are larger.

KEY TAKEAWAYS

Atlantic Canadians are most comfortable travelling within their own province in 2020.

The primary concern among event goers about attending events is catching COVID-19, or spreading COVID-19 to others.

KEY TAKEAWAYS

Health and Safety are still top of mind for Atlantic Canadians.

KEY TAKEAWAYS

Thinking ahead to events in the Winter, Spring and Fall, most respondents tend to be “somewhat anxious”.

The proportion of those who feel “extremely anxious” increased slightly when asked about attending events out of their own province.

RECOMMENDATIONS

1. **Location:** Given the preference for attending events in one's own province (in particular, in one's own community or not too far from it), events should consider nearby communities as primary audiences.
2. **Event Size:** For the near future, Atlantic Canadians prefer to attend smaller events. For events being hosted in the Fall or Winter in particular, consider a maximum capacity of 100 attendees.
3. **Venue:** Atlantic Canadians are more comfortable with outdoor events than indoor events, particularly for events being held in 2020. Larger events should be considered for outdoor spaces that can support social distancing.
4. **Health and Safety:** Health and safety concerns remain paramount among Atlantic Canadians at this time. Increasing confidence and rebuilding trust among travelers will be essential to sector recovery planning.
5. **Communication:** Provincial protocols vary across the Atlantic Province's. events targeting out of province attendees should highlight protocols that are likely to differ between home province and destination province (e.g., mask requirements in indoor public spaces) to help visitors adjust expectations and prepare accordingly.
6. **Travel:** There is openness to travelling within the Atlantic Provinces.