

# Return to Events in Atlantic Canada

Actionable Insights for the Events Industry

Brought to you by  
The Tourism Industry Association of  
Prince Edward Island



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# OUR GROUP OF COMPANIES

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- **MQO Research** is a leading Atlantic Canadian Market Insights company. We believe that market research is a powerful tool when used to inform business and organizational strategies and decisions.
- 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.

# SESSION GOAL

Share insights on the mindset of event goers and the impact of COVID-19 to support future planning for the festivals and events industry in Atlantic Canada.

# BACKGROUND

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The COVID-19 pandemic has had a substantial impact on the festivals and events industry in Atlantic Canada. Vaccination rates are high and restrictions continue to lift, but how have event goer expectations and behaviors changed?

**What are the lasting implications of COVID-19 for the future of festivals and events?**



# METHODOLOGY

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**n=1,546** Atlantic Canadian event goers and  
**n=811** event goers from Southern Ontario and  
Quebec completed the survey\*



Data was collected between August 6<sup>th</sup>  
and September 4<sup>th</sup>.



Survey was conducted online

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\*Respondents who indicated they had not attended a festival or event in the last three years were excluded.

# CONTEXT

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Atlantic Canada is returning to festivals and events.

- With health and safety measures and high vaccination rates, Atlantic Canada continues to keep COVID-19 at bay
- The mindsets of event goers in Atlantic Canada have changed
- Quarantine rules continue to limit travel
- Gathering limits and other health regulations create new challenges for events





# A RETURN TO FESTIVALS AND EVENTS



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Event goers are ready to get back to festivals and events despite continued concern over COVID-19

**56%** of Atlantic Canadian event goers and 55% of Quebec and Ontario event goers **WILL** attend events this Winter

**40%** of Atlantic Canadian event goers and 38% of Quebec and Ontario event goers who will attend events this Winter report being somewhat or very anxious



# A RETURN TO FESTIVALS AND EVENTS

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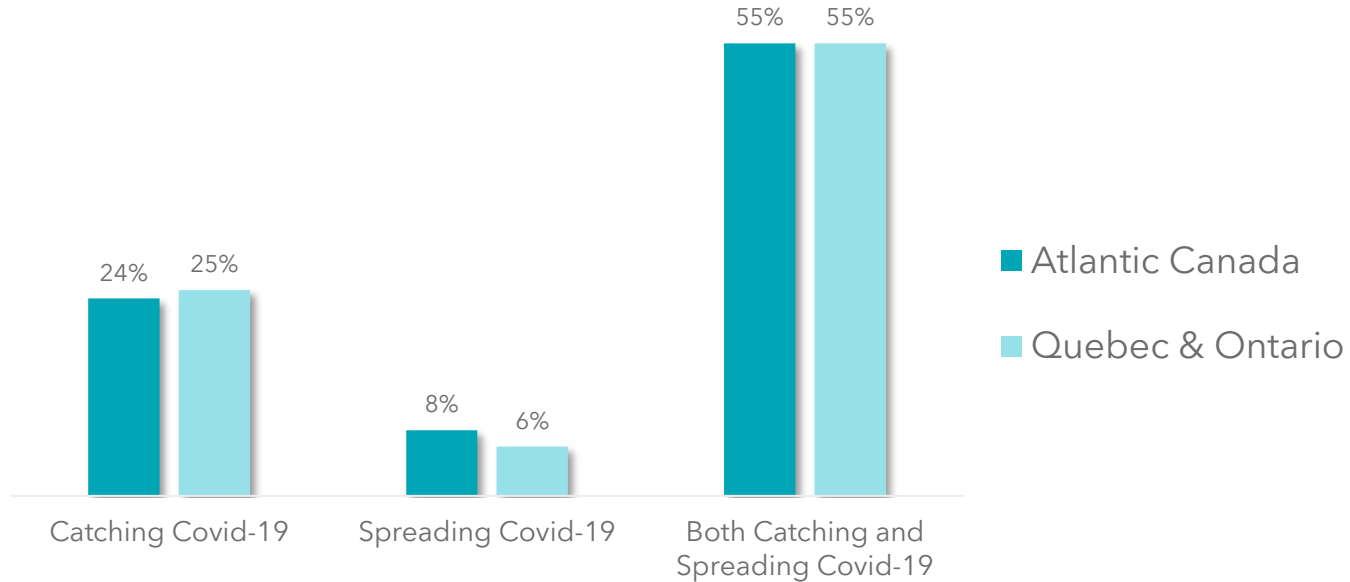
Atlantic Canadians are more willing to attend events in Spring/Summer 2022 than event goers from Quebec and Ontario

**62%** of Atlantic Canadian event goers WILL attend events Spring/Summer 2022

**55%** of Quebec and Ontario event goers WILL attend events Spring/Summer 2022

# A RETURN TO FESTIVALS AND EVENTS

Why will you NOT attend festivals or events in Winter 2022?



A photograph showing the silhouettes of a crowd of people from behind, looking towards a night sky filled with colorful bokeh lights. The lights are in shades of yellow, white, and teal. The overall mood is festive and celebratory.

# VENUE AND EVENT SIZE

# EVENT SIZE AND VENUE

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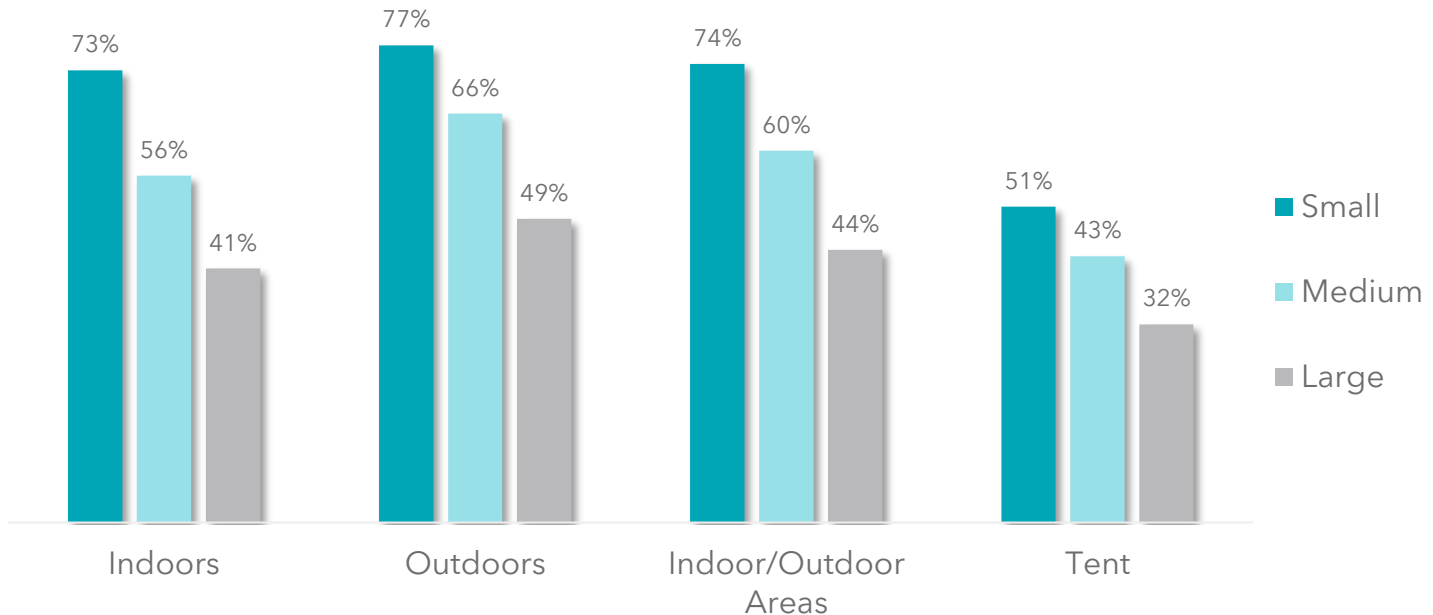
*This Winter, the majority of event goers are comfortable with events of up to 2,000 attendees, regardless of venue. However, the setting of an event still plays a significant role in attendee comfort.*

**57%**

of event goers indicated they would be somewhat or much more likely to attend an event with only outdoor spaces

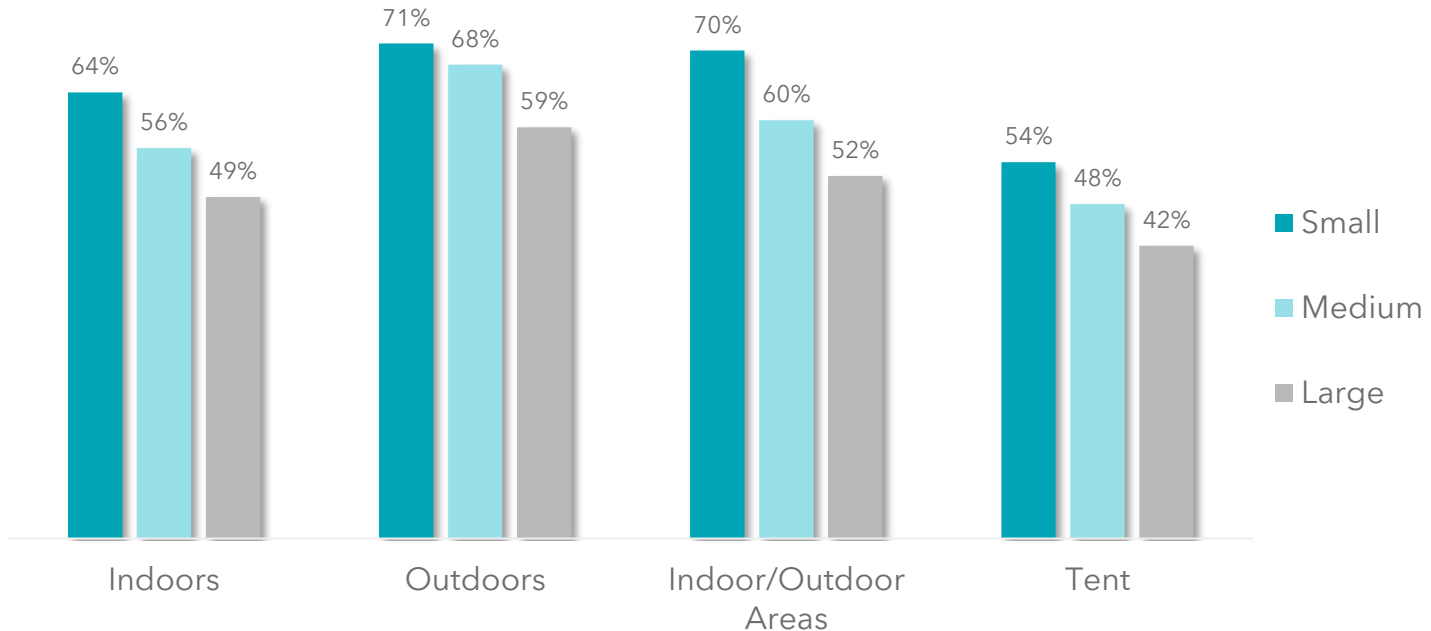
# EVENT SIZE AND VENUE

In Winter 2022, how likely would you be to attend an event or festival that is small/medium/large? (Atlantic Canadian Event Goers)



# EVENT SIZE AND VENUE

In Winter 2022, how likely would you be to attend an event or festival that is small/medium/large? (Quebec and Ontario Event Goers)



# EVENT SIZE AND VENUE

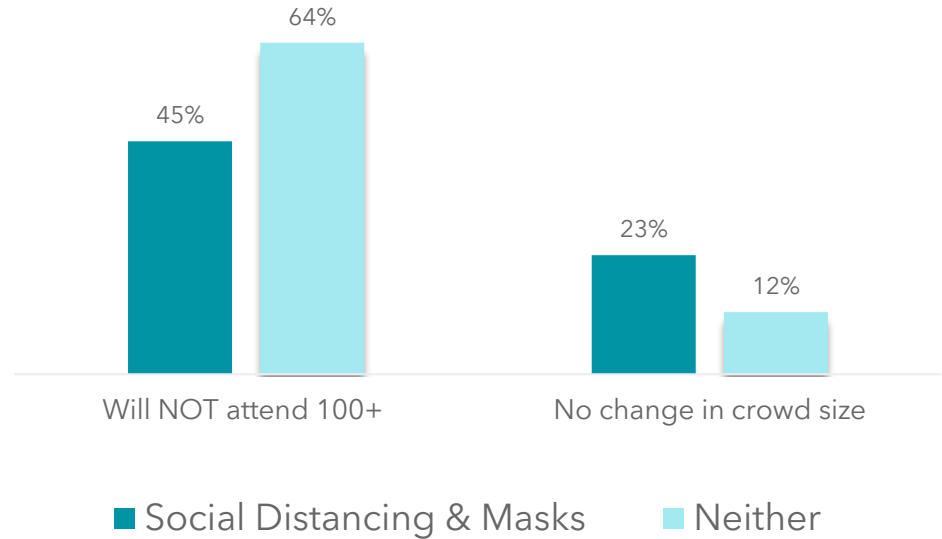
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*Tents were not a popular venue option; fewer participants reported they are likely to attend an event with a tent as the venue, across all event sizes*

# EVENT SIZE AND VENUE

Event goers are more comfortable attending large events where social distancing and masks are required







# HEALTH AND SAFETY WHAT EVENT GOERS NEED TO FEEL SAFE



# HEALTH AND SAFETY MEASURES

**68%**

of Atlantic Canadian event goers are less likely to attend an event with no vaccination requirements for attendees.

**57%**

of Atlantic Canadian event goers would be more likely to attend an event where the staff were fully vaccinated

*Vaccine policies  
have a significant  
impact on  
likelihood to attend  
events*

# HEALTH AND SAFETY MEASURES

*Removing health and safety precautions/actions is likely to negatively impact attendance*

Would any of the following make you more or less likely to attend a festival or event in Winter 2022?

Somewhat/much less likely to attend, No impact on my likelihood to attend, Somewhat/much more likely to attend

Decrease Likelihood to Attend	Atlantic Canada		
	Less Likely to attend	No Impact	More Likely to attend
No vaccination requirements for attendees	<b>68%</b>	20%	8%
No social distancing	<b>64%</b>	23%	10%
No face masks required inside	<b>64%</b>	19%	13%
Large crowds	<b>65%</b>	24%	6%

# HEALTH AND SAFETY MEASURES

*Removing health and safety precautions/actions is likely to negatively impact attendance*

Would any of the following make you more or less likely to attend a festival or event in Winter 2022?

Somewhat/much less likely to attend, No impact on my likelihood to attend, Somewhat/much more likely to attend

Decrease Likelihood to Attend	Quebec and Ontario		
	Less Likely to attend	No Impact	More Likely to attend
No vaccination requirements for attendees	<b>64%</b>	17%	16%
No social distancing	<b>63%</b>	20%	14%
No face masks required inside	<b>59%</b>	19%	18%
Large crowds	<b>61%</b>	24%	11%

# HEALTH AND SAFETY MEASURES

## *Impact of maintaining health and safety precautions/actions on attendance*

Would any of the following make you more or less likely to attend a festival or event in Winter 2022?

Somewhat/much less likely to attend, No impact on my likelihood to attend, Somewhat/much more likely to attend

Increase Likelihood to Attend	Atlantic Canada		
	Less Likely to attend	No Impact	More Likely to attend
Full refund/cancellation policy	9%	23%	<b>65%</b>
Frequent cleaning/sanitation	11%	25%	<b>62%</b>
Fully vaccinated staff working at event	11%	29%	<b>57%</b>
Outdoor spaces only	12%	27%	<b>57%</b>
Face masks required inside	21%	20%	<b>56%</b>

# HEALTH AND SAFETY MEASURES

## *Impact of maintaining health and safety precautions/actions on attendance*

Would any of the following make you more or less likely to attend a festival or event in Winter 2022?

Somewhat/much less likely to attend, No impact on my likelihood to attend, Somewhat/much more likely to attend

Increase Likelihood to Attend	Quebec and Ontario		
	Less Likely to attend	No Impact	More Likely to attend
Full refund/cancellation policy	10%	28%	<b>59%</b>
Frequent cleaning/sanitation	11%	31%	<b>55%</b>
Fully vaccinated staff working at event	12%	32%	<b>53%</b>
Outdoor spaces only	11%	28%	<b>57%</b>
Face masks required inside	20%	23%	<b>54%</b>



# FESTIVALS AND EVENTS NOW

## POST COVID CHANGES FOR FESTIVALS AND EVENTS

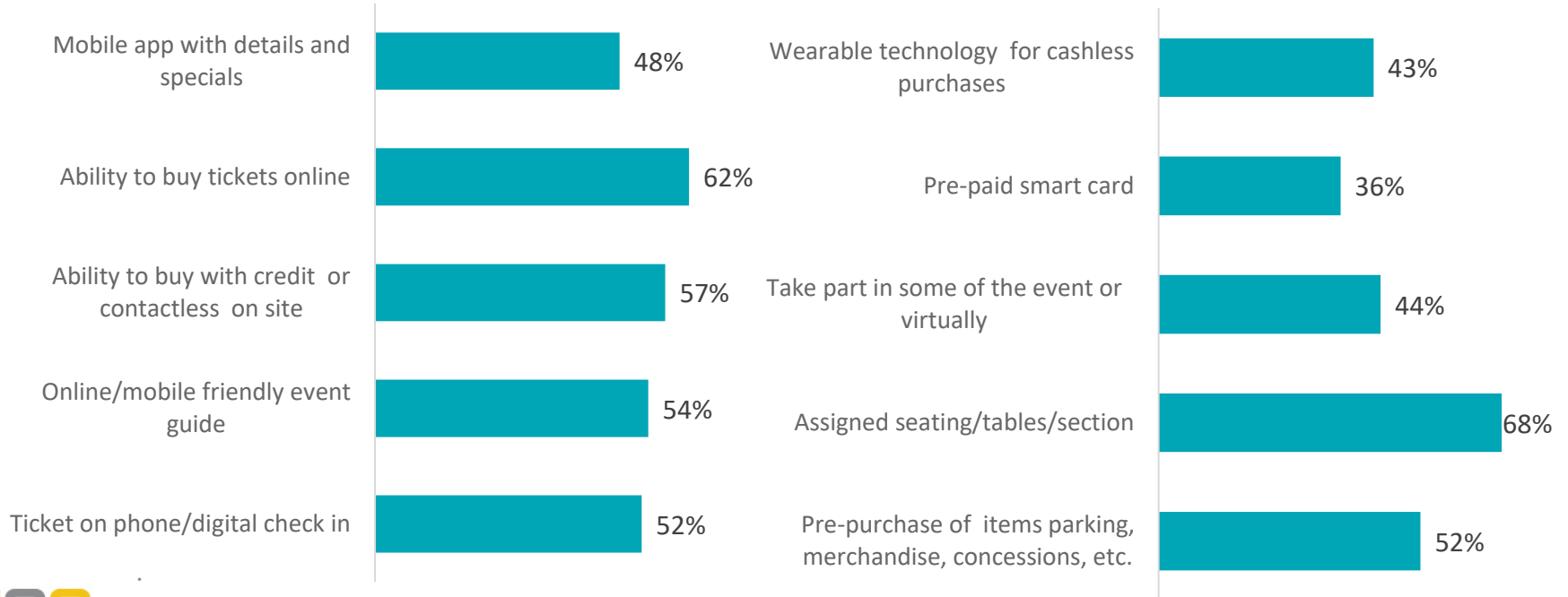


*How has COVID-19 changed participant expectations and appetite for new technology?*



# FESTIVALS AND EVENTS NOW: EXTRA FEATURES

Would any of the following make you more or less likely to attend a festival or event?



# FESTIVALS AND EVENTS NOW: EXTRA FEATURES

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Investment in technology to enable hybrid (in-person/virtual) events, wearable technology for cashless purchases, and pre-paid smart cards may add to an event but are not necessary.

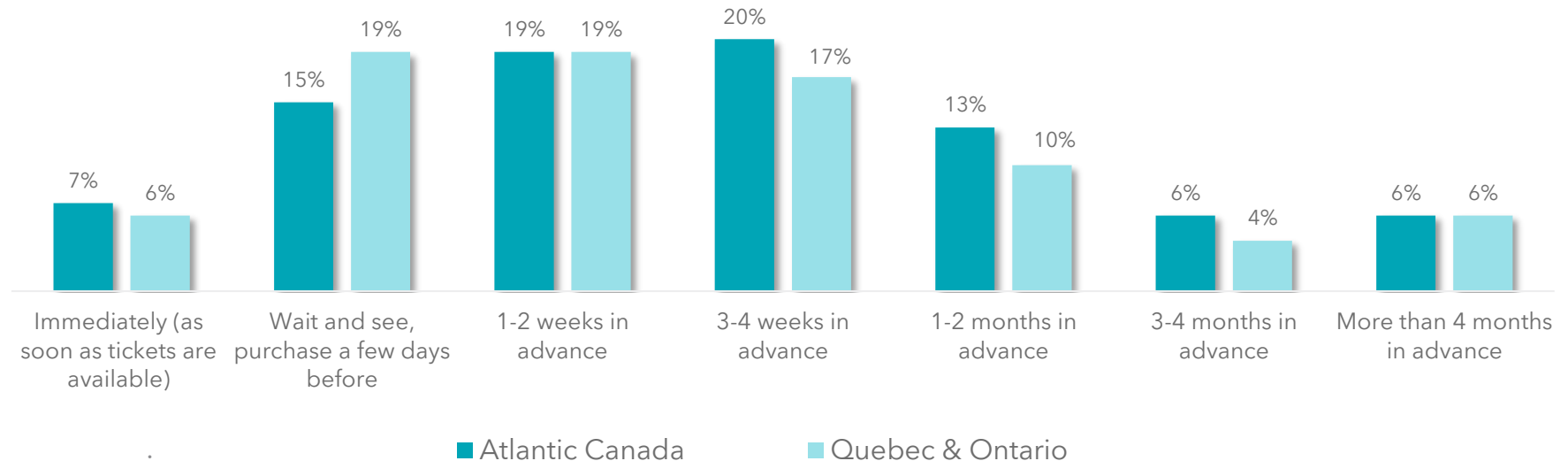
The event options that resulted in the largest increase in likelihood to attend were assigned seating, tables, or sections, followed by contactless purchasing and the ability to buy tickets online rather than in-person.

Likelihood to attend also increased significantly for events that offered a full refund/flexible cancellation policy.

# FESTIVALS AND EVENTS NOW: TICKET PURCHASING

*Increased uncertainty has influenced desire for flexible cancellation policies and ticket purchases closer to event dates*

How far in advance are you comfortable purchasing tickets for festivals or events?



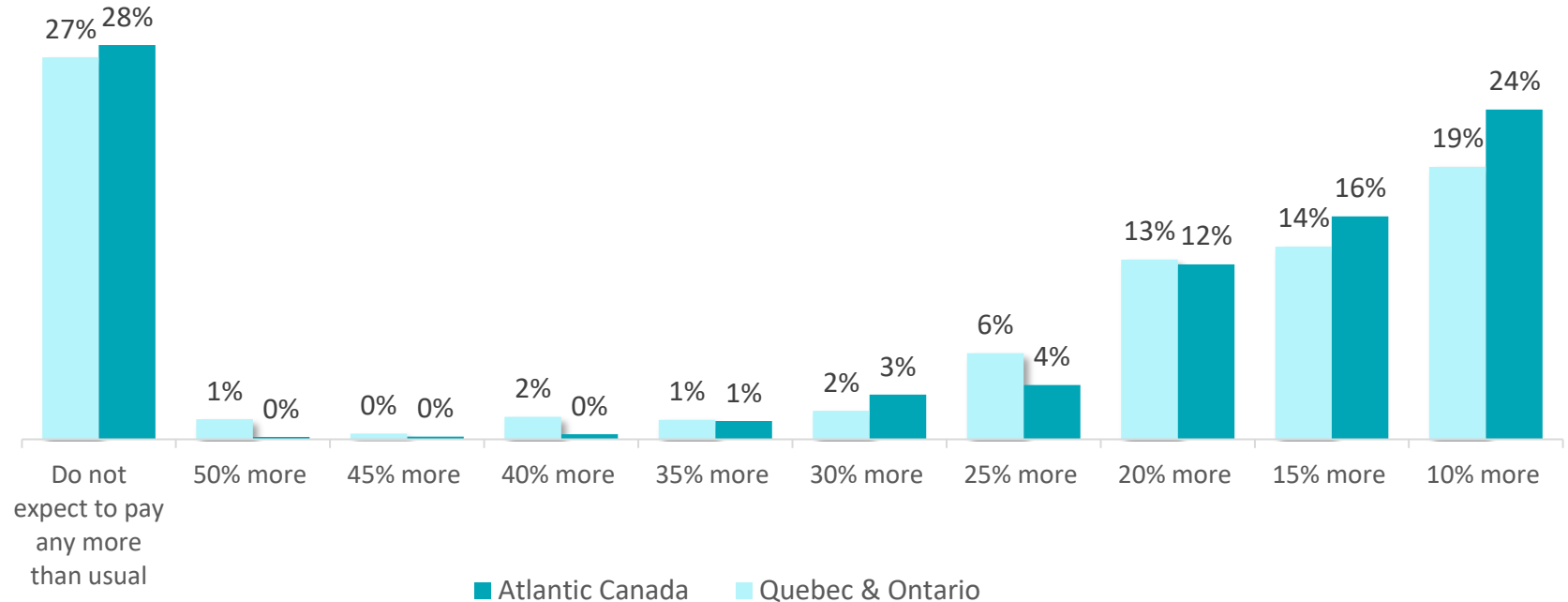
# FESTIVALS AND EVENTS NOW: PRICING

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*Although participants expect changes to festivals and events (increased health and safety measures), many event goers are not willing to pay more*

# FESTIVALS AND EVENTS NOW

Events have increased costs and there are lower capacities due to the COVID-19 pandemic. These factors impact ticket prices and fees. How much more would you expect to spend, compared to pre-COVID prices?



**WHAT'S NEXT?**



# SUPPLIER HEALTH RESEARCH

*Purpose of the research is to understand...*

- The state of the supplier community that supports the Festivals and events sector.
- Current baseline and capacity of suppliers, required supports and gaps that exist in the supplier community, etc.
- Possible solutions to ensure the health of the supplier community for the future of festivals and events

## APPROACH

*Online survey*

*In-depth interviews*

*Focus group*

## RESEARCH TARGETS

Research team will be seeking to reach businesses that supply festivals and events in Atlantic Canada:

- *Venues*
- *Event Management Companies*
- *Production Services*
- *Transportation*
- *Catering*
- *Security*
- *Rental (portable toilets, tents, tables, etc.)*
- *Marketing and PR*



# WHAT HAVE WE LEARNED?

TOP 10 TAKEAWAYS



# 1. EVENT GOERS DO NOT EXPECT A RETURN TO BEFORE COVID

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Event goers have been changed by COVID-19 and they expect festivals and events to have changed as well

## 2. DEMAND HAS INCREASED BUT ANXIETY IS STILL THERE

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Health and safety measures are important for small and large events. Vaccine policies, the ability to social distance and mask wearing are likely to increase attendance

### 3. PRICING EXPECTATIONS HAVE NOT CHANGED

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Many event goers are not willing to pay more

## 4. OUTDOORS IS STILL SEEN AS THE SAFEST VENUE OPTION

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Outdoor venues are still viewed as the safest option for large crowds, but health and safety measures can alleviate concern

Tents are the least popular venue option and are not equivalent to 'outdoors'

## 5. NEW TECHNOLOGY MAY NOT BE REQUIRED

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Although it is important for people to be able to purchase tickets online and have contactless debit/credit payment onsite at the event, event goers are not demanding technological capabilities like pre-paid contactless payment and hybrid events.

## 6. CHANGES IN TICKETING EXPERIENCES

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Technological advances are less of a draw than assigned seating

Options like the ability to reserve a table or book an area are appealing, providing additional control over event goers environment

## 7. UNCERTAINTY HAS CHANGED PURCHASING BEHAVIOR

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Buying patterns have shifted and last-minute purchases have increased significantly

## 8. FLEXIBLE CANCELLATION POLICIES ARE KEY

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Flexible cancellation policies are extremely important



## 9. THE BIGGEST OPPORTUNITY IS CLOSE TO HOME

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Atlantic Canadian event goers are more likely to attend an event in Spring/Summer 2022 than Ontario and Quebec residents – marketing dollars may still be best spent close to home

# 10. LEAD WITH EMOTION FOLLOW WITH SAFETY

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Emphasize the excitement about in person events being back but show event goes that you are conscious of concerns and taking precautions

***What does that mean?*** If you have a short form ad, the focus can shift to the excitement of the event and the emotion of getting back to in-person – but visuals should acknowledge the new normal. For print ads, information on safety should be visible and easy to access.

Safety precautions do not need to be the focus but do need to be available. It is not enough to rely on venue protocols – events should have dedicated covid-19 related communications.

**QUESTIONS?**

