Return to Events in Atlantic Canada

Actionable Insights for the Events Industry

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

with support from:
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.
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

Data was collected between August 6th and September 4th.

Survey was conducted online

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

*Respondents who indicated they had not attended a festival or event in the last three years were excluded.
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
A RETURN TO FESTIVALS AND EVENTS

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.
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?

- 24% Catching Covid-19
- 25% Spreading Covid-19
- 55% Both Catching and Spreading Covid-19

Atlantic Canada
Quebec & Ontario
VENUE AND EVENT SIZE
EVENT SIZE AND VENUE

This Winter, the majority of event goers are comfortable with events of up to 2000 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.
In Winter 2022, how likely would you be to attend an event or festival that is small/medium/large? (Atlantic Canadian Event Goers)
In Winter 2022, how likely would you be to attend an event or festival that is small/medium/large? (Quebec and Ontario Event Goers)
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 goers are more comfortable attending large events where social distancing and masks are required.

- 45% will not attend events with 100+ attendees due to social distancing and masks.
- 64% will not attend events with 100+ attendees due to social distancing and masks.
- 23% will not attend events with 100+ attendees but do not mind social distancing and masks.
- 12% will not attend events with 100+ attendees due to neither social distancing nor masks.
- No change in crowd size for 5%.
HEALTH AND SAFETY
WHAT EVENT GOERS NEED TO FEEL SAFE
Vaccine policies have a significant impact on likelihood to attend events.

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.
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

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

<table>
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<th>Decrease Likelihood to Attend</th>
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**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

<table>
<thead>
<tr>
<th>Increase Likelihood to Attend</th>
<th>Atlantic Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Less</strong> Likely to attend</td>
</tr>
<tr>
<td>Full refund/cancellation policy</td>
<td>9%</td>
</tr>
<tr>
<td>Frequent cleaning/sanitation</td>
<td>11%</td>
</tr>
<tr>
<td>Fully vaccinated staff working at event</td>
<td>11%</td>
</tr>
<tr>
<td>Outdoor spaces only</td>
<td>12%</td>
</tr>
<tr>
<td>Face masks required inside</td>
<td>21%</td>
</tr>
</tbody>
</table>
Impact of maintaining health and safety precautions/actions on attendance

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FESTIVALS AND EVENTS NOW
POST COVID CHANGES FOR FESTIVALS AND EVENTS
FESTIVALS AND EVENTS NOW

How has COVID-19 changed participant expectations and appetite for new technology?
Would any of the following make you more or less likely to attend a festival or event?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Likely to Attend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile app with details and specials</td>
<td>48%</td>
</tr>
<tr>
<td>Ability to buy tickets online</td>
<td>62%</td>
</tr>
<tr>
<td>Ability to buy with credit or contactless on site</td>
<td>57%</td>
</tr>
<tr>
<td>Online/mobile friendly event guide</td>
<td>54%</td>
</tr>
<tr>
<td>Ticket on phone/digital check in</td>
<td>52%</td>
</tr>
<tr>
<td>Wearable technology for cashless purchases</td>
<td>43%</td>
</tr>
<tr>
<td>Pre-paid smart card</td>
<td>36%</td>
</tr>
<tr>
<td>Take part in some of the event or virtually</td>
<td>44%</td>
</tr>
<tr>
<td>Assigned seating/tables/section</td>
<td>68%</td>
</tr>
<tr>
<td>Pre-purchase of items parking, merchandise, concessions, etc.</td>
<td>52%</td>
</tr>
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</table>
FESTIVALS AND EVENTS NOW: EXTRA FEATURES

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.
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?

- 7% immediately (as soon as tickets are available)
- 15% wait and see, purchase a few days before
- 19% 1-2 weeks in advance
- 19% 3-4 weeks in advance
- 20% 1-2 months in advance
- 17% 3-4 months in advance
- 13% more than 4 months in advance

Atlantic Canada
Quebec & Ontario
Although participants expect changes to festivals and events (increased health and safety measures), many event goers are not willing to pay more.
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 HAVE WE LEARNED?

TOP 10 TAKEAWAYS
1. DEMAND HAS INCREASED BUT ANXIETY IS STILL THERE

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.
Event goers have been changed by COVID-19 and they expect festivals and events to have changed as well
3. PRICING EXPECTATIONS HAVE NOT CHANGED

Many event goers are not willing to pay more
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’
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

Technological advances are less of a draw than assigned seating options. 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

Buying patterns have shifted and last-minute purchases have increased significantly
8. FLEXIBLE CANCELLATION POLICIES ARE KEY

Flexible cancellation policies are extremely important
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

Emphasize the excitement about in person events being back but show event goers 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.
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

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

APPROACH

Online survey
In-depth interviews
Focus group