

# Destination Report **Q4, 2018**



# Q4 2018 highlights

Throughout 2018, Tourism Calgary worked diligently as marketers, advocates, hosts and activators to implement and optimize elements of its 2018-2020 strategic plan for the benefit of Calgary's tourism industry. In Q4, these efforts focused on measuring 2018 achievements and formalizing plans for advancing Calgary's Destination Strategy in 2019.

Initial results from GoMedia 2018 became available in Q4 and Tourism Calgary is pleased to report that the event garnered 49,000 social media engagements and 18 million online impressions. Additionally, notable articles about Calgary were already published as direct result of this event. Further coverage is expected into 2030.

Thanks to a special grant from the Calgary Hotel Association, Tourism Calgary proudly championed Ultimate Host 2026; a collective voice representing Calgary's tourism industry in support of bidding for the 2026 Olympic and Paralympic Winter Games. Working closely with Calgary 2026 Bid Corporation, Tourism Calgary actively supported and provided information about a bid. The campaign reached its pinnacle in Q4 and concluded following the city-wide plebiscite.

In 2018, Tourism Calgary supported 89 events which generated \$107 million for the local economy. In addition to attracting and servicing these events, Tourism Calgary worked collaboratively with key stakeholders to secure 58 future events including the 2019 Canadian Country Music Awards and 107<sup>th</sup> Grey Cup Championship and Festival.

"From a city-building perspective, events enrich the community, promote civic pride and stimulate the economy," says Carson Ackroyd, Senior Vice President, Sales. "Hosting the Canadian Country Music Awards and Grey Cup is a unique opportunity to showcase Calgary's superior hosting abilities to event organizers, participants and visitors."

Tourism Calgary had a successful year promoting Calgary as a welcoming, innovative and experience-rich destination. Overall, engagement with visitors and locals increased by 20 per cent, which can be attributed to the #AskMeYYC Roaming Team's efforts and the Online Concierge pilot program.

"Throughout 2018, Tourism Calgary enabled visitors to unlock the best version of Calgary by providing better information both online and in-person," says Shelley Zucht-Shorter, Vice President, In-Destination & Event Services. "The Online Concierge program enabled 24/7 online destination counselling services, which was instrumental to our success."

Calgary's tourism industry continued to see year-over-year improvement, with December marking the 19<sup>th</sup> consecutive month of demand growth. YYC Calgary International Airport also celebrated a record year in 2018 with 17.3 million guests travelling through its gates. The 6.6 per cent increase can be attributed to growth in domestic, U.S. and international passenger numbers, making YYC one of the fastest growing Canadian airports.

More details about Tourism Calgary's key quarterly activities and performance can be found in this report.



Marketers



Advocates



Hosts



Activators





# Marketers



## Marketing programs

### Things-to-Do

The Things-to-Do program promotes natural travel moments, major events, holidays and regional activities. In Q4, visitcalgary.com articles and YouTube and Facebook videos achieved a 27 per cent conversion rate; generating 57,697 Tourism Calgary partner referrals. While conversion rate is down 15 per cent year-over-year, these results indicate the Things-to-Do program is a high-performing campaign. In Q4, paid destination content and partner schedules generated 129,245 link clicks, 121,055 engagements and saw click-thru-rates increase by 42 per cent year-over-year. With results pacing well above 2017, program outcomes indicate the right content is being shared with the right consumers.

### Alberta Bound

Formerly known as Intercept Alberta, the Alberta Bound campaign uses hyper-targeted display, search, Expedia, TripAdvisor, Print and YouTube advertising to intercept travellers who show a strong intent in booking a trip to Alberta and the Canadian Rockies. The campaign concluded in Q4 with Expedia garnering the strongest outcomes and results exceeding all targets. An ROI of 4.18:1\* was achieved, generating 16,876 room nights and over \$2 million in revenue for participating hotels. Alberta Bound will transition to a year-round program in 2019. \*Calculated using revenue, not profit.

### Niche

Research conducted in Q4 validated photographers, fly fishers and dinosaur enthusiasts as niche markets for Calgary. With consumer launch anticipated in Q2 2019, the Niche program will use social media and visitcalgary.com content to target these markets. Customer journey research, detailed program evaluations, partner/niche community member workshops and strategic plan development for each market will take place ahead of the program launch.

### visitcalgary.com

In Q4, site visitation grew by one per cent and partner page engagement grew by 36 per cent year-over-year. Search engine optimization enhancements and stabilizing measures were also applied to grow unpaid searches and online presence in 2019. Visitcalgary.com reached 2,247,365 sessions and 1,132,937 partner referrals in 2018 – indicating the site showcases partners in a compelling way. Finally, stakeholder engagement for the [industry-facing website](#) took place in Q4.

### #LoveYYC Day

Over 170 Tourism Calgary partners extended one-day #LoveYYC offers on Nov. 3, 2019 and encouraged Calgarians to celebrate their city. This year's celebration garnered 23,016 partner referrals; 100,803 social media engagements – up 270 per cent over 2017; over 4.3 million paid media impressions – new metric for 2018; and 4.6 million earned media impressions – up 269 per cent over 2017.

## GoMedia

Tourism Calgary and Travel Alberta hosted GoMedia 2018, Destination Canada's premier international travel media event from Sept. 30 to Oct. 4, 2018. Approximately 300 delegates attended and survey results confirm everyone was either satisfied, or very satisfied, with their experience. Over 49,000 social media engagements and 18 million online impressions were garnered, while notable articles have already been published in Wallpaper Magazine, Architectural Digest, New York Times and G Adventures. GoMedia-influenced coverage is expected throughout 2019, and into 2020.

# Media

## Earned media

In Q4, earned media efforts garnered 4.7 million impressions and an average quality score of 8.2\*. Finishing the year with 28 million earned media impressions, goals for 2018 were surpassed by 125 per cent. In 2018, earned media partnership-driven social media posts reached four million impressions and 5.4 per cent engagement. Additionally, 265 partner mentions were recorded within 97 articles. \*Media Quality Score measures tonality of articles produced about Calgary is scored out of 10.

## Social media

Tourism Calgary's Facebook, Instagram and Twitter accounts saw rapid growth in Q4. Notably, Instagram post engagements increased by 73 per cent year-over-year, while Instagram Stories saw 67,366 engagements in Q4. Over 2018, Tourism Calgary's digital connections saw a net gain of 41,820 and social engagements reached 1,169,605 across all channels – an eight per cent increase year-over-year. Use of #capturecalgary declined by four per cent year-over-year, while use of #LoveYYC saw a sharp decrease. These results can be attributed to increased adoption of Instagram Stories; where the Instagram API does not measure hashtag use.

## Brand evolution

Based on recommendations in Calgary's Destination Strategy, the Brand Evolution project was initiated to articulate and emotionalize Calgary's unique personality and expand on *Be Part of the Energy*. Using findings from two years of community engagement, the [new destination brand model](#) was completed in Q4. Based on personality drivers that express Calgary's image; the new brand model is a powerful resource for strategically aligning partners across all sectors. To learn more, contact [Vanessa Gagnon](#), Brand Manager.



### How success will be measured

- Increase intentions of Canadian travellers to visit Calgary within the next two years
  - 2018 results: 28 per cent of Canadians plan to visit Calgary in the next two years\*

*\*New key performance indicator baseline set in 2018.*



### Examples of key activities

- Grow social media engagement by 20 per cent to 1,124,438 annually  
Year-to-date total: 1,169,605 (up 36 per cent year-over-year)  
Q4: 388,412 engagements
- 30 travel trade joint marketing agreement signed with tour operators in 2018
- Eight tradeshows / conferences / sales missions attended including: Jonview Staff Training; Showcase Asia, Focus South Korea, Travel Alberta Industry Conference, United States Tour Operators Association, Tourism Industry Association of Canada, UK Sales Mission, World Travel Market, Canada's West Marketplace, Canadian Inbound Tour Association Asia Pacific



### How we'll track progress

- Grow digital connections by 20 per cent to 74,654 new followers in 2018  
Total: 41,820 new digital connections in 2018 (up 11 per cent year-over-year)  
Q4: 7,547 new digital connections
- Grow digital partner referrals by 10 per cent to 1,045,286  
Total: 1,132,937 digital partner referrals in 2018 (up 49 per cent year-over-year)  
Q4: 258,126 digital partner referrals
- Grow media earned impressions by 15 per cent to 18 million in 2018  
Total: 28 million earned media impressions (up 125 per cent year-over-year)  
Q4: 4,700,000 earned media impressions



# Advocates

## Advocacy

As champion of Calgary's Destination Strategy, Tourism Calgary evaluates opportunities that relate to the visitor economy through the lens of what's needed to achieve the vision of Ultimate Hosts. *Ultimate Host City*. In Q4, public advocacy efforts were focused on supporting a potential bid for the 2026 Olympic and Paralympic Winter Games. The Ultimate Host 2026 advocacy campaign was Tourism Calgary's most significant advocacy program date.

### Ultimate Host 2026

Tourism Calgary partners and stakeholders gave the organization a clear and important mandate to support and provide information about Calgary's potential bid for the 2026 Olympic & Paralympic Winter Games. Thanks to a special grant from the Calgary Hotel Association, Ultimate Host 2026 was developed and launched in Q3. The campaign reached its pinnacle in Q4 and concluded following the city-wide plebiscite on Nov. 13, 2018.

Working closely with Calgary 2026 Bid Corporation, the Ultimate Host 2026 campaign showcased Calgary's tourism industry. Some highlights from the two-month campaign included:

- Over 38,000 pieces of collateral distributed;
- UltimateHost2026.ca developed;
- 19 Olympic Bid dedicated email communications shared with over 17,000 recipients;
- Three dedicated stakeholder sessions hosted;
- Over 50 events attended, with dozens of speaking opportunities;
- 18 videos produced promoting the benefits of the bid to each sector of the tourism industry with over 20,000 views;
- Seven major stakeholder partnerships formed to promote the bid;
- Over 30 media interviews that promoted Calgary's tourism industry; and
- Over 537,000 @Calgary Twitter impressions.

As tireless and enthusiastic promoters of our city, Tourism Calgary was proud to champion this initiative. Looking forward, Calgary's robust Destination Strategy continues to advance with the input and support of partners, and Tourism Calgary will be relentless in the pursuit of its vision to make Calgary the Ultimate Host City.

## Ultimate Host City Designation

Tourism Calgary's Ultimate Host City Designation was launched in 2018 to build excitement for, and enhance participation in, Calgary's Destination Strategy: *Ultimate Hosts. Ultimate Host City*. Stakeholders that earn the Designation have proven their commitment to making Calgary the Ultimate Host City and have earned a place among Calgary's city builders, community contributors and destination influencers.

The goal for this program was to have 15 organizations earn the Ultimate Host City Designation by the beginning of Q4. This goal was exceeded, which prompted a stretch goal that aimed to have 20 organizations earn the Designation by the end of 2018. In Q4, five additional organizations were welcomed into the program including: Calgary Philharmonic Orchestra, Calgary Public Library, Checker Transportation Group, Sport Calgary and Spruce Meadows. With the inclusion of these organizations, 22 Tourism Calgary partners and stakeholders earned the Designation in 2018.

# Stakeholder engagement

## visitcalgary.com industry site

To compliment the refreshed [consumer-facing website](#), Tourism Calgary has initiated work to update the [industry-facing website](#). To aid in this process, Tourism Calgary partners and stakeholders were invited to participate in a survey and provide feedback on how the new industry website can better serve their business needs. The survey was distributed in Q4 with findings and strategic recommendations expected in Q1 2019.

## Annual Town Hall sessions

On Dec. 12, Tourism Calgary hosted two Town Hall sessions at the new Central Library. Over 150 Tourism Calgary partners attended and heard about progress on the 2018-2020 organizational strategy, the advancement of Calgary's Destination Strategy and organizational plans for 2019.



### How success will be measured

- 90 per cent of stakeholders believe Tourism Calgary is an effective champion for industry by 2020: Achieved in Q1 2018
- 15 Destination Strategy initiatives advanced or completed by 2020 (eight initiatives currently being advanced)



### Examples of key activities

- Public advocacy positions undertaken – Ultimate Host 2026, Tourism Calgary's most significant advocacy position and campaign thus far
  - Total: 28 positions undertaken in 2018
  - Q4: Eight positions undertaken
- Proactive and reactive media and public relations



### How we'll track progress

- Number of Ultimate Host City Designates
  - Total: 22 organizations earned the Ultimate Host City Designation in 2018\*
  - Q4: Five organizations earned the Ultimate Host City Designation
- Number of Tourism Calgary partners
  - Total: 679 total partners after annual partnership renewal (retention rate of 85.5 per cent)
  - Q4: 21 new partners joined

*\*The Ultimate Host City Designation was launched in Q2 2018*





## Supported events and attendance

In 2018, Tourism Calgary supported a record 89 events with 315,526 attendees. Additionally, 13 festivals received marketing support. Events converted definite by Tourism Calgary in 2018 contributed over 34,427\* paid hotel room nights. Based on calculations generated using Destination International's event impact calculator, Tourism Calgary-supported events generated an economic impact of \$107 million for the local economy. In addition to servicing these events throughout 2018, sales efforts for upcoming years secured 43,000 room nights and major events like the Canadian Country Music Awards and 107<sup>th</sup> Grey Cup Championship and Festival, which will be hosted in Calgary in Fall 2019. \*Accounts for room nights from 87 of the 89 events hosted.

## Calgary: Ultimate hosts. Ultimate host city.

### 2018/2019 World Cup Season

Seven World Cup events will be hosted within Calgary throughout the 2018/2019 season. In Q4, the ISU Short Track World Cup and FIL Luge World Cup were hosted. Tourism Calgary also supported these events through the creation of the [Cold Sweat Fest](#) campaign; a marketing program aimed at increasing attendance.

### Inaugural ATP Calgary National Bank Challenger

Based on feedback from players, officials and the Association of Tennis Professionals (ATP), the Calgary National Bank Challenger was one of the best ATP Challengers hosted in 2018. Daniel Nestor served as the Honourary Tournament Director for the nine-day event, which drew 6,365 attendees and 62 players from 23 countries. The ATP Calgary National Bank Challenger will return to Calgary Oct. 14 to 20, 2019.

### Familiarization tours

Ten familiarization tours took place in Q4 with 90 tour operator representatives from Canada, China, France, Japan, South Korea, Spain, Mexico and the United Kingdom experiencing Calgary's hospitality, attractions, hotels and restaurants. Tourism Calgary also sponsored an Air Canada Asia Sales Team industry dinner comprised of 55 guests.

## Host city selection

In Q4, Calgary was confirmed as the host city for 22 events, resulting in 21,998 future hotel room nights contracted.

### FINA Diving Grand Prix

The [FINA Diving Grand Prix](#) will take place at Repsol Sports Centre from April 4 to 7, 2019. The sold-out 2018 event featured athletes from 19 countries and reached 750,000 Canadians through two one-hour broadcasts on CBC.

### YONEX Canada Open

Known as Canada's most prestigious badminton tournament, the Badminton World Federation [YONEX Canada Open](#) will return to Calgary for the fifth consecutive year from July 1 to 7, 2019 and again in 2020

## Canadian Country Music Association 2019 Country Music Week and Awards Show

Tourism Calgary and the National Music Centre submitted a winning bid for the Canadian Country Music Association 2019 Country Music Week and Awards Show. The major event was proactively targeted in response to a recommendation in Calgary's Destination Strategy that called for more cultural events. This event will take place from Sept. 5 to 8, 2019; generating an estimated \$9 million in economic impact, and providing a valuable platform to showcase the National Music Centre to Canada's country music industry.

## 107<sup>th</sup> Grey Cup Championship and Festival

With support from Tourism Calgary, the Calgary Stampeders were successfully awarded the 107<sup>th</sup> Grey Cup Championship and Festival by the Canadian Football League. A week-long festival featuring activities for fans of all ages, parties and top entertainment precedes the championship game, which will be played on Sunday, Nov. 24, 2019. Expected to draw over 100,000 attendees, the potential economic impact from the festival and championship game is estimated at over \$35 million. In continuing with our city's legacy as a sport city, the Grey Cup Host Committee and Calgary Stampeders will develop a legacy plan to benefit the Greater Calgary Amateur Football Association and its 6,000 players.



### How success will be measured

- Grow the number of Tourism Calgary-supported events from 68 to 75
  - 2018 total: 89 events directly supported by Sport, Culture & Major Events; 13 festivals received marketing support
- Achieve incremental growth in attendees at Tourism Calgary-supported events by three per cent, annually
  - 2018 total: 315,526 attendees\*

*\*New key performance indicator baseline set in 2018*



### Examples of key activities

- Connected with 19 national sport organizations and event rights holders during a sales mission to Ottawa in mid-October
- Launched Cold Sweat Fest; a marketing campaign developed to promote the seven World Cups being held in Calgary over the 2018/2019 winter season.



### How we'll track progress

- 315,526 attendees at supported events in 2018 – 48,698 in Q4
  - 34,427 paid hotel room nights 2018 – 7,392 in Q4\*\*
  - 58 events contracted by Tourism Calgary in 2018 - 22 in Q4
  - 44,021 future room nights contracted in 2018 – 21,998 in Q4
  - 28 travel trade FAM tours hosted in 2018 – 10 in Q4
- \*\*Accounts for paid hotel room nights from 87 of the 89 events hosted in 2018*





# Activators

## Visitor services

### #AskMeYYC Roaming Team and visitor inquiries

Tourism Calgary's #AskMeYYC Roaming Team operated from May through September – extending its season by one month in 2018. The team provided destination counselling services in six languages to over 15,000 visitors and Calgarians, resulting in 39,043 industry partner referrals. An online tour booking platform called *OnceThere* was also piloted in 2018, resulting in 226 direct bookings for Calgary-based tour operators.

An additional 2,142 visitors and Calgarians were counselled at Tourism Calgary's corporate office and event information booths throughout 2018, leading to 7,603 partner referrals.

### Online Concierge

Tourism Calgary's Online Concierge pilot program ran from May 18 to Sept. 3, 2018 offering 24/7 online destination counselling services through [visitcalgary.com](http://visitcalgary.com), Facebook Messenger and Twitter. Throughout the program period, 1,379 online consultations took place leading to 1,843 industry partner referrals. The data collected throughout this program provided Tourism Calgary with valuable insight into online chat market adoption, the customer journey, traveller purchasing behaviour and referral and conversion targets.

### Brochure and literature distribution

Throughout 2018, Tourism Calgary distributed 373,696 pieces of literature – a seven per cent increase year-over-year. This included: Calgary's 2018/2019 Visitor Guide (42,730), Calgary Mini Maps (143,533), Calgary Attraction Brochures (118,118) and various partner brochures (69,315).

Development and printing of the 2019 Calgary Mini Map took place in Q4. A special thanks to this year's sponsors: AMPM Limousine; Calgary Stampede; Calgary Zoo; CrossIron Mills; Market Restaurant; new Central Calgary Public Library; Royal Tyrrell Museum; Spruce Meadows; Studio Bell, home of the National Music Centre; and The Rec Room.

## Frontline ambassador development

### White Hat Academy

In Q4, Tourism Calgary continued to develop its new frontline education program known as the White Hat Academy. The goal for this multi-faceted program is to inspire customer-facing employees in Calgary's tourism industry to be better ambassadors and storytellers for the city. Blending online modules with experiential learning, this free, multi-level learning program will provide members of Calgary's tourism industry with the knowledge, tools and resources they need to be Ultimate Hosts.

A live demo of the learning tool was revealed to industry partners and key stakeholders at Tourism Calgary's annual Town Hall on Dec. 12. Program launch is currently scheduled for Q1 2019.

## Frontline newsletter

Tourism Calgary's frontline database grew to 1,151 frontline contacts in 2018 – a 27 per cent increase year-over-year. Throughout 2018, Tourism Calgary partnered with Where Calgary to develop and send a weekly newsletter which served to inform frontline contacts about upcoming events, activities and deals. This program will continue into 2019.



### How success will be measured

- Increased proportions of Calgarians believe tourism is an important contributor to Calgary's economy and quality of life
  - 2018 total: 85 per cent of Calgarians believe\*
- Increased proportions of visitors and Calgarians believe Calgary offers shareable experiences
  - 2018 total: 66 per cent of Canadians believe\*
  - 2018 total: 84 per cent of Calgarians believe\*

*\*New key performance indicator baseline set in 2018.*



### Examples of key activities

- Live demonstration of White Hat Academy presented to industry partners at the annual Open House
- Increase active frontline participants to 2,000 from 1,100 in 2018
  - 2018 total: 3,900 active frontline participants



### How we'll track progress

- Grow brand image alignment to 68 per cent from 65 per cent by 2020
- Increase visitor spending in Calgary by two per cent annually\*\*
- Grow non-digital partner referrals through the #AskMeYYC Roaming Team, corporate office, events and the online concierge
  - Total: 48,489 non-digital partner referrals in 2018
- Generate \$870,000 in collaborative marketing support
  - \$823,238 in collaborative marketing support generated in 2018
  - Q4: \$55,713 in collaborative marketing support generated

*\*\*The baseline for this key performance indicator will be calculated in 2019.*

# Key Initiatives

## Marketing

Target Audience	Objective	Tactic	Outcome
Repeat visitors	Drive awareness of things to do and events in Calgary to encourage a repeat trip.	<b>Things to Do program</b> <ul style="list-style-type: none"> <li><i>Destination content components including:</i> Monthly listicles, holiday guides and micro-guides, concert and life moment itineraries, event-focused editorials and explainer videos.</li> <li><i>Co-op components including:</i> Social media and display ads, content partnerships, native advertising and partner content.</li> </ul>	<b>Things to Do destination component</b> <ul style="list-style-type: none"> <li><u>Content performance</u> <ul style="list-style-type: none"> <li>Unique page views: 216,646 (-15% year-over-year)</li> <li>Referrals: 57,697 (-30% year-over-year)</li> <li>Conversion rate: 27% (-15% year-over-year)</li> <li>Average time on page 5:06 minutes (-26% year-over-year)</li> <li>Video completion rate: 20% (-26% year-over-year)</li> </ul> </li> <li><u>Ad performance</u> <ul style="list-style-type: none"> <li>Click-through rate on destination ads:</li> <li>Social: 0.98% (+42% year-over-year)</li> <li>Search engine marketing: 14.37% (+1% year-over-year)</li> <li>Native: 0.34% (historical comparison unavailable)</li> <li>Display: 0.32% (+146% year-over-year)</li> </ul> </li> <li><u>Room nights</u> <ul style="list-style-type: none"> <li>Campaign-specific packages: 357 (-26% year-over-year) *</li> <li>Revenue generate: \$65,138 (-22% year-over-year) *<i>sales strategy shifted to influence destination perception and sales through video and influencer content.</i></li> </ul> </li> </ul>
In-market	Increase awareness among Calgarians about things to see and do in their city. Connect travellers to relevant experiences and facilitate a seamless in-destination experience.	<b>General Social Media</b> <ul style="list-style-type: none"> <li>Promotions across seven channels including social editorial platforms like Instagram Stories, Facebook Live and Snapchat for richer audience engagement.</li> </ul>	<b>General social media promotions</b> <ul style="list-style-type: none"> <li>New digital connections: 7,547 (-37% year-over-year)</li> <li>Hashtag uses: 28,477 (-30% year-over-year)</li> <li>Social media engagements: 346,585 (+63% year-over-year)</li> </ul>
Visiting friends and relatives	Drive awareness of things to do in Calgary to increase visitation of Calgarians' friends and relatives.	<b>SEM campaign</b> <ul style="list-style-type: none"> <li>Includes purchased keywords for those actively seeking out Calgary.</li> </ul>	<b>SEM campaign</b> <ul style="list-style-type: none"> <li>Paid search sessions: 97,043 (+104% year-over-year)</li> <li>Paid searches reaching new users: 92% (net zero year-over-year)</li> <li>Average session duration: 66 seconds (-14% year-over-year)</li> </ul>
Alberta Bound	Convince travellers that Calgary is an essential component of any trip to Alberta.	Use hyper-targeted advertising and content products to promote key experiences that motivate travellers to add Calgary to their itineraries.	<ul style="list-style-type: none"> <li><u>Sales performance for 2018</u> <ul style="list-style-type: none"> <li>Room nights: 16,876</li> <li>Revenue: \$2,045,529</li> </ul> </li> <li><u>Content performance for 2018</u> <ul style="list-style-type: none"> <li>Pageviews: 209,206</li> <li>Referrals: 14,921</li> <li>Conversion rate: 7.13%</li> <li>Average time on page: 2:15 minutes</li> <li>Video views: 133,428</li> </ul> </li> <li><u>Ad performance for 2018</u> <ul style="list-style-type: none"> <li>Cost-per-click: \$0.10</li> <li>Click-through rate: 0.44%</li> </ul> </li> </ul> <p>* 2018 well exceeded targets and will serve as a benchmarking year for this program</p>
Niche	Convince members of specific communities that Calgary has the experiences they're looking for.	In research program targeting photographers, dinosaur enthusiasts and fly-fishers, highlighting associated experiences.	<ul style="list-style-type: none"> <li>An extensive research project around this program concluded in Q4, with results validating market opportunity for both fly-fishing and dinosaur niches. Next steps include product identification, customer journey research and strategic plan development.</li> </ul>



# Destination News

## Calgary Hotel Performance

Hotel room demand returned to a more modest level of growth in the final quarter of 2018, following the record-setting pace in the second and third quarters. Rooms sold reached record monthly highs from May through Sept. 2018. These records can be attributed to a 20 per cent increase in room supply over the past five years, competitive rates and an increased number of visitors to Calgary. Overall, the number of rooms sold rose by 1.8 per cent in Q4 compared to Q4 2017 - down from growth rates in rooms sold of 7.1 per cent in Q2, 3.3 per cent in Q3 and 3.1 per cent in Q1. Year-to-date, rooms sold improved by 3.9 per cent overall, with occupancy up 2.4 percentage points to 61.9 per cent. 2018 revenue increased by 5.9 per cent compared to 2017.

		YEAR-TO-DATE DEC		
		2018	%Change	Difference
<b>Calgary Overall</b>	Occupancy Rate	61.9%	4.1%	<b>2.4</b>
	Rooms Sold	3,259,869	3.9%	122,592
	Room Supply	5,264,979	-0.2%	-7,936
	Daily Room Rate	\$145.51	1.9%	\$2.75
	RevPAR	\$90.09	6.1%	\$5.14
<b>Downtown</b>	Occupancy Rate	63.8%	2.7%	<b>1.7</b>
	Rooms Sold	1,014,944	3.3%	31,988
	Room Supply	1,590,968	0.5%	8,693
	Daily Room Rate	\$194.75	2.3%	\$4.33
	RevPAR	\$124.24	5.0%	\$5.94
<b>Northeast</b>	Occupancy Rate	60.5%	3.6%	<b>2.2</b>
	Rooms Sold	1,302,522	8.5%	102,071
	Room Supply	2,154,344	4.7%	96,724
	Daily Room Rate	\$119.48	0.3%	\$0.39
	RevPAR	\$72.24	4.0%	\$2.76
<b>Northwest</b>	Occupancy Rate	63.3%	-1.0%	<b>-0.6</b>
	Rooms Sold	333,401	-7.8%	-28,037
	Room Supply	526,867	-6.8%	-38,355
	Daily Room Rate	\$117.45	4.5%	\$5.09
	RevPAR	\$74.32	3.4%	\$2.47
<b>South</b>	Occupancy Rate	61.4%	11.9%	<b>6.6</b>
	Rooms Sold	609,208	4.0%	23,686
	Room Supply	992,800	-7.0%	-74,998
	Daily Room Rate	\$132.52	3.9%	\$5.00
	RevPAR	\$81.32	16.3%	\$11.39

% change compared to previous year at the same time; Difference shows the raw change in value (in percentage points or dollars).

Source: Smith Travel Research, Inc. Reproduction or other re-use of this data without the express written permission of STR is strictly prohibited.

## Calgary Airport Authority Passenger Statistics

Passenger traffic through Calgary International Airport increased by 6.6 per cent in 2018, with domestic traffic up 7.0 per cent, transborder (U.S.) traffic up 6.9 per cent and international passenger traffic up 2.9 per cent year-over-year. International passenger traffic experienced some turbulence in Q3 (July and August 2018 saw the first decline in year-over-year international passenger traffic since November 2015) as overseas direct air capacity to Alberta declined compared to last year. Overall, 17.3 million passengers moved through YYC in 2018 – one million passengers more than 2017, marking another record year.

Passenger Statistics by Sector						
	2016	% Change	2017	% Change	2018	% Change
<b>Domestic</b>						
Q1	2,519,123	4.7%	2,502,221	-0.7%	2,610,413	4.3%
Q2	2,725,876	0.6%	2,813,183	3.2%	3,005,981	6.9%
Q3	3,242,997	1.5%	3,343,318	3.1%	3,693,033	10.5%
Oct	943,406	1.5%	989,893	4.9%	1,053,208	6.4%
Nov	819,518	0.7%	855,304	4.4%	888,069	3.8%
Dec	901,995	-1.8%	932,141	3.3%	985,340	5.7%
Q4	2,664,919	0.1%	2,777,338	4.2%	2,926,617	5.4%
<b>Transborder</b>						
Q1	736,518	-6.6%	761,534	3.4%	811,705	6.6%
Q2	688,533	-6.1%	761,334	10.6%	828,971	8.9%
Q3	821,848	0.9%	848,411	3.2%	888,217	4.7%
Oct	240,156	-1.8%	259,810	8.2%	273,814	5.4%
Nov	220,598	-1.1%	238,087	7.9%	267,490	12.3%
Dec	237,409	-3.1%	255,171	7.5%	271,176	6.3%
Q4	698,163	-2.0%	753,068	7.9%	812,480	6.95%
<b>International</b>						
Q1	450,456	7.0%	485,002	7.7%	547,738	12.9%
Q2	364,619	5.7%	395,988	8.6%	417,362	5.4%
Q3	390,593	9.5%	410,170	5.0%	401,534	-2.1%
Oct	101,090	8.2%	102,162	1.1%	105,201	3.0%
Nov	122,637	14.5%	143,395	16.9%	128,595	-10.3%
Dec	153,244	15.1%	178,738	16.6%	165,555	-7.4%
Q4	376,971	13.0%	424,295	12.6%	399,351	-5.9%
<b>TOTAL – Q1</b>	<b>3,706,097</b>	<b>2.5%</b>	<b>3,748,757</b>	<b>1.2%</b>	<b>3,969,856</b>	<b>5.9%</b>
<b>TOTAL – Q2</b>	<b>3,779,028</b>	<b>-0.2%</b>	<b>3,970,505</b>	<b>5.1%</b>	<b>4,252,314</b>	<b>7.1%</b>
<b>TOTAL – Q3</b>	<b>4,455,438</b>	<b>2.1%</b>	<b>4,601,899</b>	<b>3.3%</b>	<b>4,982,784</b>	<b>8.3%</b>
<b>TOTAL – Q4</b>	<b>3,740,053</b>	<b>0.9%</b>	<b>3,954,701</b>	<b>5.7%</b>	<b>4,138,448</b>	<b>4.6%</b>
<b>TOTAL – YTD</b>	<b>15,680,616</b>	<b>1.32%</b>	<b>16,275,862</b>	<b>3.80%</b>	<b>17,343,402</b>	<b>6.56%</b>

Source: Calgary Airport Authority

# Convention Sales

## Q3 new lead activity – Q4 NOT AVAILABLE

The “new lead activity report” provides a summary of new leads received in Q3, along with quarter and full-year-to-date (FYTD) comparisons with the previous year.

In Q3 2018, Meetings + Conventions Calgary (MCC) forwarded 32 leads representing 29,886 potential room nights compared to 34 leads representing 41,647 potential room nights in Q3 2017. Of the 32 new leads in Q3, four leads turned definite (1,432 room nights), 23 remained tentative at the end of Q3 (23,281 room nights) and five leads were lost (5,173 room nights).

TOTAL				
	2018 Q3	2017 Q3	FYTD 2018	FYTD 2017
Leads	32	34	109	108
Attendance	15,815	24,420	54,150	89,695
Room Nights	29,886	41,647	98,704	136,102
Direct Attendee Spending	\$10,998,048	\$15,326,096	\$36,323,072	\$50,085,536

## Q3 all lead activity – definite events

The “all leads activity report” summarizes all leads in the MCC pipeline with a status change that occurred within the quarter.

In Q3, 13 events representing 4,388 room nights turned definite versus 13 events representing 6,671 definite room nights in Q3 2017. This does not include the 2025 Rotary International Convention at 44,650 total room nights (Letter of Intent received and the first financial deposits were made in Q3 to the two official venues).

DEFINITE EVENTS				
	2018 Q3	2017 Q3	FYTD 2018	FYTD 2017
Events	13	13	35	41
Attendance	2,605	9,115	21,055	23,489
Room Nights	4,388	6,671	18,280	28,284
Direct Attendee Spending	\$1,614,784	\$2,454,928	\$6,727,040	\$10,408,512

NOTE: Direct Attendee Spending is calculated from an estimate of the average daily spend per room night.

Source: Meetings + Conventions Calgary, 2018 Q3 Report