



tourism
calgary

Destination Report

Q1 | 2019

Q1 2019 highlights

2019 started strong for Calgary's tourism industry, with March marking the fourth consecutive month of increased hotel room demand.

Diving into the second year of the 2018-2020 strategic plan, Tourism Calgary continued to achieve success as defined by its stakeholder community.

The Things-To-Do campaign showcased Tourism Calgary partners and marketed Calgary as a vibrant hub worthy of visiting. To ensure team efficiencies and maintain a strong return on investment (ROI), the campaign was restructured, resulting in 66 per cent of the 2019 investment target being achieved in Q1.

In Q1, 93 per cent of stakeholders agreed Tourism Calgary is an effective champion for industry – up three per cent over 2018.

"The 2019 stakeholder engagement survey showed that Tourism Calgary's efforts to engage stakeholders in a more consistent and strategic way have proven effective," said Cassandra McAuley, Executive Director, Stakeholder Engagement & Destination Development.

In Q1, Calgary secured the exclusive Canadian rights to host X Games for a minimum three-year run.

"As the most relevant action sports and music festival in youth culture, X Games would bring significant economic benefits to Calgary including an estimated \$75 million in economic activity, 74,000 attendees and more than 10,000 out-of-region visitors annually," said Carson Ackroyd, Senior Vice President, Sales.

Launched near the end of Q1, Tourism Calgary's White Hat Academy is a free online learning program that provides customer-facing employees in Calgary's tourism industry with the tools and resources they need to be ultimate hosts. Reception of the program was overwhelmingly positive with 79 graduates earning their certification in Q1.

Since January 2017, 25 out of 27 months have seen year-over-year growth, with rooms sold in Q1 increasing by 4.9 per cent compared to 2018.

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





Marketers

Consumer engagement and growing intent to visit

Guided by a key performance indicator measuring intention to visit, all marketing and in-destination programs are built to grow interest in visiting Calgary. In 2018, InsightsWest established that 28 per cent of Canadians plan to visit Calgary within the next two years. Tourism Calgary's goal is to grow Canadian's intention to visit to 31 per cent from 28 per cent by 2020; moving Calgary up to third place behind Toronto at 39 per cent and Vancouver at 35 per cent.

Growing intent

Along the consumers' path to purchase, there are many opportunities for Tourism Calgary to engage and reinforce their intent to visit. Knowing this, Tourism Calgary works to impact visitor intention and make Calgary a destination of choice through:

Awareness: Building positive attitudes and the **desire** to travel to Calgary

Consideration / planning: Reinforcing the **decision** and supporting the visit to Calgary

In-market support: Facilitating the **experience** to explore more of Calgary

Consumer advocacy: Sharing the **positive outcomes** from the experience

Measures for 2019 demonstrate proof of impact in these areas (see page 10 for Q1 performance).

Key marketing initiatives in Q1

Agency onboarding

In Q1, Tourism Calgary transitioned its paid media, digital and research portfolios to new agencies of record. The creative and digital portfolios were taken over by Evans Hunt, media planning and buying by Vovia and research by Stone Olafson. In Q1, these agencies were immersed in Tourism Calgary's business and all portfolios became fully operational.

Brand Evolution project

In Q1, Tourism Calgary launched phase three of the Brand Evolution project. Ten Living the Brand workshops were hosted where 220 partners and stakeholders learned about, and began to strategically align with, Calgary's new destination brand model.

Evans Hunt also started developing a consumer-focused creative platform that Tourism Calgary will use to market the destination to regional and national visitors. The creative platform is scheduled for release in late Q2.

Media monitoring shift to TrendKite

In Q1, Tourism Calgary assessed media monitoring service providers and fully transitioned its operations to TrendKite. In addition to traditional media monitoring, TrendKite offers a unique public relations attribution service, which allows Tourism Calgary to track consumer behaviour. Specifically, Tourism Calgary can track when someone reads an online article about Calgary, then visits an online travel agency site and searches for Calgary/Alberta. This functionality enables Tourism Calgary to measure how earned media efforts impact intention to visit. Refinement of search terms and reporting will take place through Q2.

Alberta Bound and Things-To-Do campaigns

After a successful pilot program in summer 2018, the Alberta Bound program shifted to a year-round initiative. In Q1, hyper-targeted advertising campaigns were used to showcase Calgary's winter and early spring offerings to travellers who showed a strong intent to book a trip to Alberta and the Canadian Rockies.

In Q1, Tourism Calgary worked with the Calgary Hotel Association to launch all 2019 paid marketing programs. To ensure team efficiencies and maintain strong ROI performance, the Things-To-Do Co-op marketing campaign was restructured. The new structure was well received with 66 per cent of the total 2019 target for partner investment being achieved in Q1.



How success will be measured

- Grow Canadian travellers' intent to visit Calgary to 31 per cent from 28 per cent by 2020
**Baseline developed in 2018 with 28 per cent of Canadians planning to visit Calgary in the next two years*



Key activities

- Agency onboarding, market planning and implementation of paid programs
- Media monitoring services transitioned to TrendKite
- Hosted 10 Living the Brand workshops
- Signed 20 travel trade joint marketing agreements with tour operators
- Attended seven tradeshows / conferences / sales missions including: Asia RTO, Travel Alberta Germany and Destination Canada France sales missions; Corroboree Australia, ITB Berlin, Mexico Reverse sales mission and German Tour Operator strategic planning session



Performance

- More than 150 million earned media impressions due largely to New York Times article
- Achieved 66 per cent of total 2019 Things-To-Do Co-op marketing investment target
- Top three content pieces / topics consumed by audiences in Q1: monthly things-to-do lists, campgrounds and RV parks and the Chinatown Ice Sculpture Showcase.



Advocates

An effective champion for Calgary's tourism industry

As steward of Calgary's Destination Strategy, Tourism Calgary works to engage its stakeholders year-round. In Q1, Tourism Calgary measured levels of engagement by inviting over 700 industry partners to complete its annual stakeholder engagement survey.

A resounding 93 per cent of stakeholders agreed that Tourism Calgary is an effective champion for the industry – up three per cent over 2018. These findings build on the hard work and collaboration of Calgary's tourism industry and show that Tourism Calgary's efforts to engage stakeholders in a more consistent and strategic way have proven effective.

While the results indicated that stakeholders are actively engaged and proud to work with Tourism Calgary, opportunities were identified for improving the overall stakeholder experience. Notably, 66 per cent of stakeholders rated their interactions with Tourism Calgary as "exceptional" – down from 70 per cent in 2018. In Q1, work began to address how Tourism Calgary best provides ultimate host service for stakeholders.

Thanks to the continuous support and collaboration of Tourism Calgary's diverse stakeholders, Calgary's reputation as the Ultimate Host City continues to grow. On behalf of the entire Tourism Calgary team, we appreciate the time and input of those who completed the survey. If you have any questions or feedback about the survey and its results, please contact [Cassandra McAuley](#), Executive Director, Stakeholder Engagement & Destination Development.

Ultimate Host City Designation

Tourism Calgary launched the Ultimate Host City Designation in 2018 to build excitement for, and enhance participation in, Calgary's Destination Strategy. 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.

In Q1, Calgary Telus Convention Centre earned the Ultimate Host City Designation, and Tourism Calgary invited 23 additional organizations to apply. Discussions also began around increasing application rates and extending the program benefits even further.

Stakeholder engagement

Partnership

Tourism Calgary's partner base reached 709 organizations, with 50 new businesses joining in Q1. To educate businesses about Tourism Calgary and partnership benefits, two partner orientation sessions and 37 industry partner meetings were hosted in Q1.

2019 Tourism Calgary Open House presented by Air Canada

On January 29, Tourism Calgary hosted its annual Open House at Studio Bell, home of the National Music Centre. Over 325 tourism industry partners and stakeholders attended, networked, listened to performances by local musicians and enjoyed food and beverages from 15 local restaurants, craft breweries and distilleries.

Tourism Calgary would like to thank following partners for supporting this event: Air Canada, Banded Peak Brewing, Booker's BBQ Grill & Crab Shack, Burwood Distillery, Cold Garden Beverage Co., Donna Mac, Eighty-Eight Brewing, Fiasco Gelato, Flower & Wolf, FMAV, Food Tourism Strategies, Market, Mercato, Ol' Beautiful Brewing Company, OneWest Event Design, Pie Junkie, Pigeonhole, The Coup and Wurst.



How success will be measured

- 93 per cent of stakeholders believe Tourism Calgary is an effective champion for industry – up three per cent over 2018
- 15 Destination Strategy initiatives advanced or completed by 2020
 - Q1: Completed or advanced one initiative



Key activities

- Undertook five public advocacy positions
- Proactive and reactive media and public relations



Performance

- Ultimate Host City Designation
 - One organization earned the Ultimate Host City Designation in Q1
- Tourism Calgary partners
 - 709 total partners
 - Q1: 50 new partners joined



Hosts

Ultimate Hosts

Sport, culture & major events

In Q1, four world cups and the Special Olympics Alberta Winter Games were hosted; showcasing Calgary as the ultimate host city for winter sport events. Tourism Calgary supported a total of 25 events in Q1, which attracted more than 30,000 attendees, garnered 8,100 room nights and contributed \$17.6 million* in economic impact. Some hosting highlights included:

*Economic impact is determined using the Destination International Event Impact Calculator.

FIS Freestyle Ski Moguls World Cup – Jan. 12

In Q1, this event was hosted at WinSport for the 10th consecutive year. The event had 2,700 spectators, was broadcast on CBC and generated more than \$1.3 million in economic impact.

Special Olympics Alberta Winter Games – Feb. 8-10

This event attracted 4,100 spectators who watched 1,105 athletes compete in seven sports at various venues around the city. This resulted in an economic impact of nearly \$1.1 million.

FIS Freestyle Ski & Snowboard Halfpipe World Cups – Feb. 13-16

WinSport is home to one of the best halfpipes in North America, making it the perfect host venue for this year's FIS Freestyle Ski & Snowboard Halfpipe World Cups. The event had 1,700 spectators and generated more than \$950,000 in economic impact.

ISU World Allround Speed Skating Championship – March 2-3

Broadcast as part of CBC's *Road to the Olympic Games* program, this prestigious event was an incredible success. With more than 4,000 spectators in attendance, the event generated an economic impact of more than \$1.9 million.

Travel trade familiarization tours

Five travel trade familiarization (FAM) tours took place in Q1 with over 60 tour operator representatives from Canada, China, Germany, Japan, Mexico and the United Kingdom experiencing Calgary's hospitality, attractions, hotels and restaurants.

Ultimate Host City

X Games Calgary

In Q1, the Government of Alberta, City of Calgary and Tourism Calgary announced that Calgary has secured the exclusive Canadian rights to host X Games for a minimum three-year run. As the most relevant action sports and music festival in youth culture, hosting the X Games would bring significant economic benefits to Calgary, including an estimated: \$75 million in annual economic activity, 75,000 annual attendees and more than 10,000 out-of-region annual visitors. Calgary is targeting to host the X Games beginning late February or early March of 2020, 2021 and 2022 subject to securing corporate sponsorship.

New marketing & communications coordinator

Tourism Calgary reinforced its focus on sport and major event marketing by hiring a new marketing & communications coordinator dedicated to event marketing, bid support, advocacy and asset management. This role will support events rights holders in reaching their event objectives, while ensuring they have a seamless experience hosting events in Calgary.



How success will be measured

- Grow the number of Tourism Calgary-supported events to 75 from 68 by 2020
 - Achieve incremental growth in attendees at Tourism Calgary-supported events by three per cent, annually*
- * Baseline developed in 2018 with 315,526 attendees at Tourism Calgary-supported events



Key activities

- Met with over 25 national sport federations at Sport Event Congress in Ottawa
- Implemented the Destination International Event Impact Calculator
- Supported Calgary securing the exclusive Canadian rights to host X Games



Performance

- Supported 25 events in Q1 2019
- Hosted 32,958 attendees at supported events in Q1 2019
- Contracted 8,172 room nights in Q1 2019
- Generated \$17,616,297 in economic impact through supported events in Q1 2019
- Contracted 1,669 room nights for future events
- Hosted five travel trade FAM trips in Q1 2019



Activators

Visitor services

Visitor inquiries and the #askmeyyc roaming team

Tourism Calgary offers year-round, in-person visitor counselling services through its administrative office. In Q1, Tourism Calgary staff and volunteers counselled 302 visitors and Calgarians, leading to 1,212 face-to-face partner referrals – up six per cent over Q1 2018.

In Q1, Tourism Calgary prepared for the May 18 launch of the #askmeyyc roaming team. This included recruiting and hiring all staff members and onboarding new tour operators to the OnceThere online tour booking service. To support the launch, Tourism Calgary also met with members of Calgary’s tourism industry to ensure all partners and frontline ambassadors were aware of the services offered through the #askmeyyc roaming team.

Brochure distribution

In Q1, Tourism Calgary produced the Calgary Mini Map and distributed 63,000 copies to hotel and attraction partners throughout the city. The 2019/2020 Calgary Visitor Guide was also produced in Q1, with printing and distribution scheduled for Q2.

Collectively, Tourism Calgary distributed 100,753 2018/2019 Calgary Visitor Guides, Mini Maps and partner brochures in Q1.

Frontline ambassador development

White Hat Academy

On March 18, Tourism Calgary launched the White Hat Academy; a new, online, multi-level learning program that provides customer-facing employees in Calgary’s tourism industry with the knowledge, tools and resources they need to be ultimate hosts. Blending online modules with experiential learning, the White Hat Academy features over 850 images, 300 stories about Calgary, 160 insider tips for experiencing the best of Calgary and much more.

Between March 18 to 31, 244 tourism industry staff and supervisors enrolled in the White Hat Academy and 79 graduates earned their certification. Tourism Calgary delivered special prizes and packages to the first 50 graduates to celebrate their success and to encourage their co-workers to participate. Hotel Blackfoot, Glenmore Inn and Hotel Elan were the first three Tourism Calgary partners to have employees graduate from the White Hat Academy.

2019 Frontline Experience Pass

Tourism Calgary's Frontline Experience Pass ensures members of Calgary's tourism industry are well informed about, have personally experienced and can recommend key Calgary experiences. Throughout Q1, Tourism Calgary connected with industry partners, collected offers and built out the creative elements for the 2019 pass. Over 4,800 passes will be printed and distributed to frontline ambassadors in Q2, providing them with opportunities to visit and experience some of Calgary's unique tour, attraction and culinary offerings.

Frontline newsletter

In collaboration with Where Calgary, Tourism Calgary develops and distributes the Where Weekly newsletter to inform frontline ambassadors about upcoming events, activities and deals in Calgary. In Q1, Tourism Calgary's frontline ambassador database grew to 1,219 contacts.

Calgary White Hat Awards

This year, Tourism Calgary received a record 906 Calgary White Hat Award nominations, which recognized tourism industry professionals from 103 organizations. Interviews took place at the Calgary Zoo, Safari Lodge where more than 250 volunteers completed 644 interviews. Work was also completed in preparation for the 57th annual Calgary White Hat Awards gala.



How success will be measured

- Increase the proportion of Calgarians who believe tourism is an important contributor to Calgary's economy and quality of life*
** Baseline developed in 2018 with 85 per cent of Calgarians believing tourism is an important contributor to Calgary's economy and quality of life*
- Increase the proportion of Canadians and Calgarians who believe Calgary offers shareable experiences*
** Baseline developed in 2018 with 66 per cent of Canadians and 84 per cent of Calgarians believing Calgary offers shareable experiences*



Key activities

- White Hat Academy launched
 - Q1: 244 tourism industry staff and supervisors enrolled and 79 graduates earned their certification



Performance

- Increase visitor spending in Calgary by two per cent annually**
- Grow face-to-face partner referrals through #askmeyyc roaming team, corporate office and event consultations
 - Q1: 1,212 face-to-face partner referrals

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

Q1 | Tourism Calgary Marketing Performance

Key performance indicators:

- Grow Canadian travellers' intent to visit Calgary to 31% from 28% by 2020
- Increase the proportion of Canadians (66%) and Calgarians (84%) who believe Calgary offers shareable experiences

↑ Indicates on or above quarter target

↓ Indicates below quarter target

Awareness

2019 target includes website visits, earned media impressions, social media engagements and digital connections.

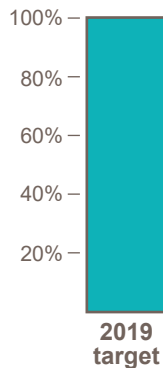
Proof Tourism Calgary is sharing stories about Calgary:

↑ **150M+**
earned media impressions
400% over target because of New York Times article.

↓ **337,071**
visits to visitcalgary.com
12% below target.

↑ **11,879**
digital connections

↑ **293,055**
social media engagements



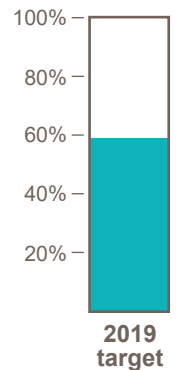
Consideration and planning

2019 target includes average number of web pages viewed per visit and digital inquiries.

Proof Tourism Calgary is growing knowledge of Calgary's offerings and influencing bookings:

↑ **1.63**
average number of web pages viewed per visit

↓ **69,919**
digital inquiries
6% below Q1 target.



Baseline measures for impact of earned media efforts on trips booked to Calgary through online travel agencies will be established in 2019.

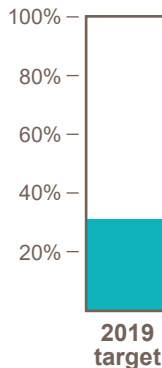
In-market

2019 target includes digital, social and in-person partner referrals; event attendance; experience pass distribution and marketing support revenue.

Proof Tourism Calgary is influencing in-market exploration:

↑ **226,812**
partner referrals

↑ **\$360,167**
in marketing support revenue
Includes partner investment in Things-to-Do Co-op campaign, which is at 66% of 2019 target.



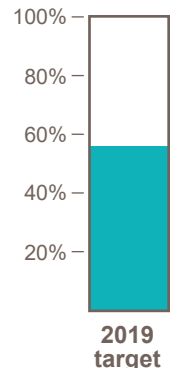
Consumer advocacy

2019 target includes social sentiment score and hashtag use.

Proof Tourism Calgary is increasing positive commentary about, and sharing of, Calgary:

↑ **49%**
positive social sentiment score
Considered healthy.

↓ **21,117**
hashtag uses
10% below Q1 target.



Baseline measures for positive online reviews and brand adoption will be established in 2019.

Baseline measures for economic impact of Tourism Calgary marketing efforts will be established in 2019.

Destination News

Calgary Hotel Performance

Each month in Q1 showed a year-over-year increase in hotel room demand and Calgary set a record high for rooms sold in the month of February. At the same time, room supply expanded by 5.8 per cent year-to-date through the opening of four new properties that added more than 900 rooms to Calgary's nightly inventory (374 rooms in the Northeast quadrant, 153 rooms in the South quadrant, and 390 rooms in Downtown/Beltline). The large increase in room supply during Q1 more than offset the gains in rooms sold; causing occupancy to fall slightly on a year-to-date basis and placing downward pressure on room rates.

		YEAR-TO-DATE MAR		
		2019	%Change	Difference
Calgary Overall	Occupancy Rate	50.6%	-0.9%	-0.5
	Rooms Sold	689,397	4.9%	32,116
	Room Supply	1,361,420	5.8%	74,964
	Daily Room Rate	\$135.15	0.3%	\$0.43
	RevPAR	\$68.40	-0.6%	-\$0.43
Downtown	Occupancy Rate	48.9%	-6.1%	-3.2
	Rooms Sold	203,157	0.0%	31
	Room Supply	415,380	6.5%	25,230
	Daily Room Rate	\$181.93	2.7%	\$4.71
	RevPAR	\$88.98	-3.6%	-\$3.28
Northeast	Occupancy Rate	52.0%	1.1%	0.6
	Rooms Sold	294,956	10.1%	27,106
	Room Supply	567,023	8.9%	46,377
	Daily Room Rate	\$112.50	-1.2%	-\$1.42
	RevPAR	\$58.47	-0.2%	-\$0.14
Northwest	Occupancy Rate	52.0%	7.1%	3.4
	Rooms Sold	65,140	2.5%	1,577
	Room Supply	125,190	-4.3%	-5,670
	Daily Room Rate	\$108.39	5.1%	\$5.28
	RevPAR	\$56.40	12.6%	\$6.32
South	Occupancy Rate	49.4%	-0.8%	-0.4
	Rooms Sold	125,471	2.9%	3,516
	Room Supply	253,827	3.7%	9,027
	Daily Room Rate	\$124.76	0.6%	\$0.76
	RevPAR	\$61.57	-0.3%	-\$0.20

% 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 5.7 per cent in the first two months of 2019, with domestic traffic up 6.9 per cent, transborder (U.S.) traffic up 4.7 per cent and international passenger traffic up 1.6 per cent year-over-year. Passenger statistics for March 2019 were not available at the time of publication of this report.

Passenger Statistics by Sector

	2017	% Change	2018	% Change	2019	% Change
Domestic						
Jan	829,767	2.0%	860,122	3.7%	928,820	8.0%
Feb	795,247	-2.0%	831,024	4.5%	879,128	5.8%
Mar	877,207	-1.9%	919,267	4.8%	--	
YTD	2,502,221	-0.7%	2,610,413	4.3%	1,807,948	6.9%
Transborder						
Jan	237,859	0.6%	254,503	7.0%	264,679	4.0%
Feb	243,501	2.7%	258,650	6.2%	272,435	5.3%
Mar	280,174	6.5%	298,552	6.6%	--	
YTD	761,534	3.4%	811,705	6.6%	537,114	4.7%
International						
Jan	166,907	5.8%	185,649	11.2%	183,511	-1.2%
Feb	152,314	5.0%	170,980	12.3%	178,942	4.7%
Mar	165,781	12.3%	191,109	15.3%	--	
YTD	485,002	7.7%	547,738	12.9%	362,453	1.6%
TOTAL – YTD	3,748,757	1.2%	3,969,856	5.9%	2,707,515	5.7%

Source: Calgary Airport Authority

Convention Sales

Q1 new lead activity

The “new lead activity report” provides a summary of new leads received in Q1, along with quarter and full-year-to-date (FYTD) comparisons with the previous year.

In Q1 2019, Meetings + Conventions Calgary (MCC) forwarded 45 leads representing 77,308 potential room nights. In comparison, 45 leads representing 36,826 potential room nights were forwarded in Q1 2018. Of the 45 new leads in Q1, one lead turned definite (135 room nights), 32 remained tentative at the end of Q1 (50,878 room nights) and 12 leads were lost (26,295 room nights).

TOTAL				
	2019 Q1	2018 Q1	FYTD 2019	FYTD 2018
Leads	45	45	45	45
Attendance	38,507	21,405	38,507	21,405
Room Nights	77,308	36,826	77,308	36,826
Direct Attendee Spending	\$28,449,344	\$13,551,968	\$28,449,344	\$13,551,968

Q1 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 Q1 2019, 14 events representing 12,412 room nights turned definite versus nine events representing 7,650 definite room nights in Q1 2018.

DEFINITE EVENTS				
	2019 Q1	2018 Q1	FYTD 2019	FYTD 2018
Events	14	9	14	9
Attendance	7,285	13,245	7,285	13,245
Room Nights	12,412	7,650	12,412	7,650
Direct Attendee Spending	\$4,567,616	\$2,815,200	\$4,567,616	\$2,815,200

NOTE: Direct Attendee Spending is calculated from an estimate of the average daily spend per delegate per room night, and includes spending on all products/services while in Calgary attending a convention.

Source: Meetings + Conventions Calgary, 2019 Q1 Report