

Destination Report Q3, 2018

BIAS

Q3 2018 highlights

In Q3, Tourism Calgary diligently implemented the strategic initiatives and tactics outlined in its 2018-2020 Strategic Plan. Through these efforts, Tourism Calgary works to achieve success as defined by its stakeholder community, meet the needs of visitors and Calgarians and position Calgary as a destination of choice.

The Niche Marketing program was launched in Q3, using social media and visitcalgary.com content to target photographers, fly fishers and dinosaur enthusiasts. Having only been in market for one quarter, this program has already garnered an impressive 109,665 social engagements and 5,460 unique page views.

"Our marketing efforts are geared toward increasing the likelihood that travellers will visit Calgary within two years," said Jeff Hessel, Senior Vice President, Marketing. "The Niche Marketing program contributes to these efforts by using storytelling to engage specialized audiences and generate consumer demand."

Tourism Calgary's advocacy efforts in Q3 focused on a bid for the 2026 Olympic and Paralympic Winter Games. A survey found that 83 per cent of tourism industry respondents expect Tourism Calgary to proactively encourage a bid. Based on these results, Tourism Calgary established its most significant advocacy position and campaign to date – aptly named Ultimate Host 2026.

"As the primary advocate for our sector, Tourism Calgary actively communicates what is important to stakeholders," says Cassandra McAuley, Executive Director, Stakeholder Engagement & Destination Development. "Calgary's tourism industry gave us the mandate to support and provide information about a 2026 Olympic and Paralympic Winter Games bid. Through Ultimate Host 2026, we delivered on that mandate."

In Q3, 28 Tourism Calgary-supported events took place including the Beltline Urban Murals Project and Shaw Charity Classic. Calgary was also confirmed as the host city for 10 events including the 2019 Elite Canada in Rhythmic Gymnastics competition and 2019 World Racquetball Tour, Canadian Open.

The Calgary Frontline Experience Pass program concluded in Q3, providing frontline staff with the means to participate, learn about, experience and recommend things to see and do in Calgary. Initial results show 5,541 offers were redeemed and 6,564 people participated in the attraction, experience and restaurant offers.

The industry continued to see year-over-year improvement, with September marking the 16^{th} consecutive month of demand growth. Overall, rooms sold increased by 3.3 per cent compared to Q3 2017, while room supply was down slightly by -0.7 per cent.

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



Marketing programs

Things To Do

In Q3, the Things to Do Program continued to promote natural travel moments, major events, holidays and a breadth of regional activities. Approximately 110 pieces of content were produced and disseminated in Q3, yielding 325,336 unique page views on visitcalgary.com and 83,821 referrals to industry partners. Partner referrals have grown by three per cent year-over-year and the average time on page is 3:12, indicating that users are consuming and engaging with the content. Results for paid destination content and partner schedule advertising are pacing above 2017, except for in-market advertising, which can be attributed to Facebook creating a more competitive landscape for in-market display ads.

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Promotions for the Calgary Zoo and Calgary Hotel Association Panda Package drove over 2,400 room nights and increased sales by 30 per cent year-over-year. Tourism Calgary will continue to leverage the Panda Passage exhibit at the Calgary Zoo in regional markets over the next few years.

Intercept Alberta

The Intercept Alberta pilot program uses sophisticated ad targeting to intercept travellers who show a strong intent to book a trip to the Canadian Rockies and other areas of Alberta - generating incremental visitation and spend in Calgary. In Q3, display, search, TripAdvisor, print and YouTube ads were optimized and displayed to people searching destinations in Alberta (excluding Calgary). With two months remaining, the campaign has yielded a 4.67:1* return on investment, generating 15,000 room nights and \$1.8 million in revenue. *Calculated using revenue, not profit.

Niche

Launched in Q3, the Niche program uses social media and visitcalgary.com content to target photographers, fly fishers and dinosaur enthusiasts. Since inception, the program has yielded 109,665 social engagements and 5,460 unique page views, respectively. An extensive research project was also launched around this program in Q3 to acquire market validation and understand the segment potential of these niche audiences.

visitcalgary.com

Visitcalgary.com was launched in Q1 and saw its first quarter of growth in Q3 with visitation increasing by 3.6 per cent and partner engagement growing by 57 per cent year-over-year. This indicates the new website is a strong tool that showcases partners in a compelling way. However, organic traffic declined by 35 per cent year-over-year in Q3, prompting a comprehensive search engine optimization audit. Technical fixes will be implemented immediately to address this. Finally, the stakeholder engagement phase of the industry-site redevelopment project was launched in Q3.

GoMedia

At the end of Q3, Tourism Calgary and Travel Alberta hosted GoMedia Canada 2018, Destination Canada's premier international travel media event. Over 150 travel media and influencers and 150 industry partners attended, experienced Calgary's offerings and uncovered Canadian stories from coast-to-coast. Final event results will be presented in Q4.

Media

Earned media

Tourism Calgary hosted over 30 writers and influencers in Q3, sharing experiences like Chasing Summer, Calgary Pride, Honens International Music Festival and a Fly Fishing FAM. Tourism Calgary garnered 7.1 million earned media impressions and 1.7 million social media impressions with an average engagement of six per cent. A sincere thank you to Tourism Calgary's hotel, restaurant, attraction and industry partners for their media hosting support.

Social media

In Q1 and Q2, Tourism Calgary's seven social media channels saw a decline in engagement. However, following a comprehensive audit and strategy implementation, the channels returned to a high state of engagement in Q3. Strategies focused on elevating Facebook connections, Instagram photography, Snapchat and Instagram Story videos and Twitter content. This resulted in 439,402 total engagements in Q3 – a 41 per cent increase year-over-year.

Brand evolution

In 2017, Tourism Calgary and Calgary Economic Development embarked on a brand evolution project to expand the *Be Part of the Energy* identity and articulate Calgary's distinct personality. Phase one focused on better understanding Calgary's place DNA with <u>results</u> showing Calgary is a vibrant city with remarkable community spirit. Phase two took place during Q2 and Q3 with ideation workshops consisting of 100 stakeholders from various industries. The ideation workshops explored aspects of Calgary's place DNA and audiences, then generated ideas on how to influence these audiences. Moving forward, a Brand Advisory Committee is using insights from both phases to develop a brand framework that reflects Calgary's distinct personality, brand attributes, purpose and positioning. For more information, please contact <u>Vanessa Gagnon</u>, Brand Manager.



 Increase intentions of Canadian travellers to visit Calgary within the next two years*

*The baseline for new key performance indicators will be developed in 2018.

- Grow social media engagement by 20 per cent to 1,124,438 annually Year-to-date total: 781,193
 - Q3: 439,402 engagements (up 41 per cent year-over-year)
- One travel trade joint marketing agreement signed with tour operators
- Five tradeshows / conferences / sales missions attended including: Canadian Inbound Tourism Asia Pacific Summer Function; Destination Canada Montreal Meeting; Travel Alberta China, United Kingdom and Mexico DMO Sales Missions; World Winter Sport Expo and Calgary Flames exhibition hockey games in Beijing
- Grow digital connections by 20 per cent to 74,654 new followers in 2018 Total: 41,317 new digital connections in 2018 Q3: 17,692 new digital connections (up 7 per cent year-over-year)
- Grow digital partner referrals by 10 per cent to 1,045,286
 Total: 874,811 digital partner referrals in 2018
 Q3: 468,229 digital partner referrals (up 57 per cent year-over-year)
- Grow media earned impressions by 15 per cent to 18 million in 2018 Total: 24,207,881 earned media impressions
 Q3: 7,187,936 earned media impressions (up 81 per cent year-over-year)

Advocates

Advocacy

As champion for Calgary's tourism and hospitality industry, Tourism Calgary advocates for opportunities that benefit visitors, Calgarians and the economy. These efforts are guided by the recommendations established in Calgary's Destination Strategy that support Calgary's vision to become Ultimate Host City. In Q3, Tourism Calgary undertook its most significant advocacy position and campaign to date, aptly named Ultimate Host 2026. This campaign focuses on articulating the opportunities and benefits associated with the 2026 Olympic and Paralympic Winter Games as well as sharing the collective voice of Calgary's tourism industry in support of a bid.

Ultimate Host 2026

In late August, Tourism Calgary commissioned a survey to further understand the sentiments and expectations of its stakeholder organizations regarding a potential bid for the 2026 Olympic and Paralympic Winter Games. Results found that 79 per cent of tourism industry respondents support Calgary pursuing a bid and 95 per cent agree Tourism Calgary has a key role in providing accurate information about potential bid, hosting and legacy opportunities. Most notably, 83 per cent of stakeholders expect Tourism Calgary to proactively encourage a bid. These results established Tourism Calgary's mandate to foster support and collaboration toward a 2026 Olympic and Paralympic Winter Games bid.

To carry out this mandate, Tourism Calgary spearheaded the formation of Ultimate Host 2026; a collective voice representing Calgary's tourism industry in support of bidding for the 2026 Olympic and Paralympic Winter Games. Tourism Calgary recognized the need for a platform that articulates the numerous benefits associated with the bidding, hosting and legacy phases of the Games. As such, a multi-platform campaign was launched to share facts, up-to-date information and stories that support a legacy for the city while setting a precedent for the province and country. Platforms activated for this campaign include: ultimatehost2026.com, Twitter, weekly email updates, traditional media and a video series that highlights the benefits of the Games from the perspective of tourism industry leaders. For more information about the Ultimate Host 2026 campaign, please contact <u>Cassandra McAuley</u>, Executive Director, Stakeholder Engagement & Destination Development.

Ultimate Host City Designation

Tourism Calgary's Ultimate Host City Designation was launched in Q2 to build excitement for, and enhance participation in, Calgary's Destination Strategy: *Ultimate hosts. Ultimate host city*. Stakeholders that apply for and receive 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.

Goals established during this program's strategic planning phase aimed to have 15 organizations earn the Ultimate Host City Designation between the program launch in May 2018 and the end of Q3. Tourism Calgary is proud to announce that initial program goals have been exceeded with 17 organizations currently possessing an Ultimate Host City Designation. Ten organizations were welcomed into the program in Q3 including: Canadian Sport Institute Calgary, Fiasco Gelato, Kelly Brothers Productions Inc., Marriott International, Olympic Oval, One Yellow Rabbit & The Calgary High Performance Rodeo, Shaw Charity Classic, Theatre Calgary, The Calgary Zoo and WinSport.

As this program grows, so does the strategic alignment, unified commitment and collaboration of the city's key partners and stakeholders. In turn, this will positively impact the organizations involved, stimulate the economy, build the city, amplify experiences, enhance quality of life, intensify Calgary's vibrancy and foster community spirit.

Partnership

With 35 new businesses joining in Q3, Tourism Calgary now represents over 715 industry partners – a new organizational record! This achievement is attributable to Tourism Calgary's strong organizational work and reputation; excellent marketing programs; new travel trade products; enhanced activation programs; strategic sport, culture and major event collaborations; advocacy efforts and partner engagement approaches.

To further educate partners about Calgary's Destination Strategy, Tourism Calgary and the benefits, marketing programs and engagement opportunities available, one orientation session and 36 industry partner meetings were hosted throughout Q3. The Tourism Talk Industry Social was also hosted at Hotel Blackfoot on September 13, where Tourism Calgary staff engaged with more than 75 partners and stakeholders.

In Q3 Tourism Calgary continued to promote online access to the Partner Savings Program. Over 70 offers are now available on the visitcalgary.com industry site. A partnership blitz was also undertaken where the Tourism Calgary team met face-to-face with 15 businesses in the Beltline District to discuss upcoming initiatives and thank them for their collaboration.



- 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)
- Public advocacy positions undertaken Ultimate Host 2026, Tourism Calgary's most significant advocacy position and campaign thus far
 - Total: 20 positions undertaken in 2018
 - Q3: Six positions undertaken
- Proactive and reactive media and public relations
- Number of Ultimate Host City Designates
 - Total: 17 organizations have earned the Ultimate Host City Designation in 2018
 - Q3: 10 organizations earned the Ultimate Host City Designation*
- Number of Tourism Calgary partners
 - Total: 716 total partners
 - Q3: 35 new partners joined in Q3

*The Ultimate Host City Designation was launched in Q2 2018



Calgary: Ultimate hosts. Ultimate host city.

ScotDance Canada Championship Series 2018

Over the Canada Day long weekend, Calgary welcomed 900 dancers from destinations including Scotland, the United States, Australia, South Africa and Bermuda for the ScotDance Canada Championship Series 2018. Throughout the fourday event, over 6,300 spectators came to the Calgary TELUS Convention Centre to experience the competition.

Ironman 70.3

On July 29, Ironman 70.3 hosted its 10th anniversary race in Calgary. With rolling terrain, clear blue waters and spectacular views of the Rockies, Calgary's race is known as one of the most scenic on the circuit. Tourism Calgary has proudly supported the Ironman since the inaugural event in 2008.

Beltline Urban Murals Project

The Beltline Urban Murals Project (BUMP), hosted by the Beltline Neighbourhoods Association, showcases art, promotes tourism, highlights local businesses, improves the public realm and builds community spirit. The festival took place between August 30 and September 3 with celebrations that included the painting of 10 new murals, live music, alley parties and walking tours.

Shaw Charity Classic

For the sixth year running, the world's top PGA Champion golfers were welcomed to Calgary over Labour Day long weekend. Over 42,000 people came out to experience the event where Scott McCarron successfully defended his title. Since 2013 the Shaw Charity Classic has raised more than \$22.1 million for over 180 child and youth-based charities in Alberta, setting a record every year for charitable giving on the PGA TOUR Champions.

Familiarity tours

Four familiarity tours took place in Q3 with 38 tour operator representatives from China, France, Germany, Mexico and Canada experiencing Calgary's hospitality, attractions, hotels and restaurants. Tourism Calgary also provided sponsorship support for an airline industry event for key accounts, VIP guests and tourism partners.

Supported events and attendance

Tourism Calgary has supported 88 events (28 in Q3), where over 259,596 attendees were hosted*. Events converted definite by Tourism Calgary have contributed 22,572 consumed hotel rooms since the start of 2018.

Event hosting support

In Q3, Tourism Calgary supported six sport events with welcoming and pageantry programs, event marketing, promotions and itinerary planning services. These events included, but are not limited to, The Football Canada Cup and U19 Women's Field Lacrosse Invitational Nationals.

Host city selection

In Q3, Calgary was confirmed as the host city for 10 events, resulting in an additional 9,425 future hotel room nights contracted. This includes the 2019 Elite Canada in Rhythmic Gymnastics and 2020 Western Championship in Rhythmic Gymnastics competitions and the World Racquetball Tour, Canadian Open.

2019 Elite Canada in Rhythmic Gymnastics and 2020 Western Championship in Rhythmic Gymnastics competitions

Scheduled to take place at the Genesis Centre in February, the 2019 Elite Canada in Rhythmic Gymnastics competition will bring over 130 athletes to Calgary where they will declare a champion and identify groups for future international competitions. The following year, Rhythmic Gymnastics Alberta will host the Western Championship in Rhythmic Gymnastics, which will also take place at the Genesis Centre.

World Racquetball Tour, Canadian Open

Tourism Calgary and the Alberta Racquetball Association (ARA) confirmed that Calgary will play host to the World Racquetball Tour, Canadian Open from Oct. 18 to 21, 2019. This is the first time the World Racquetball Tour will take place in Canada and the ARA looks forward to hosting national and international players, coaches and officials at the University of Calgary Racquet Centre.



- Grow the number of Tourism Calgary-supported events from 68 to 75 by 2020
- Achieve incremental growth in attendees at Tourism Calgary-supported events by three per cent, annually
- Hosted over 100 key stakeholders during the PGA Tour Champions 2018 Shaw Charity Classic tournament
- Met with 13 provincial sport organizations and event rights holders during a sales mission to Edmonton in in mid-September
- 88 events supported in 2018 28 in Q3
- 259,596 attendees at supported events in 2018 126,458 in Q3*
- 27,035 room nights consumed in 2018 8,130 in Q3
- 36 events contracted by Tourism Calgary in 2018 10 in Q3
- 22,572 room nights contracted in 2018 9,425 in Q3
- 18 travel trade FAM tours hosted in 2018 four in Q3
- *Accounts for attendees at 17 of the 28 events hosted in Q3



Visitor services

#AskMeYYC Roaming Team and visitor inquiries

For the third year, Tourism Calgary mobilized its #AskMeYYC roaming team to provide itinerary planning services, offer experience suggestions and promote Calgary as a welcoming, innovative and experience-rich destination. This year, the multi-lingual team also increased its capacity to help visitors and Calgarians by extending its services to the end of September and offering online tour booking through a platform called *OnceThere*. Between the Victoria Day long weekend and September 30, the #AskMeYYC Roaming Team provided destination counselling services to more than 15,000 visitors and Calgarians, conducted over 38,000 industry partner referrals and booked 136 experiences with Calgary-based tour operators.

An additional 1,925 visitors and Calgarians were counselled at Tourism Calgary's corporate office and event information booths leading to 6,711 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, Facebook Messenger and Twitter. Throughout the program period, 1,412 online consultations took place leading to 184 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.

Frontline ambassador development

2018 Frontline Experience Pass

The 2018 Calgary Frontline Experience Pass was launched in mid-April with 3,400 key frontline staff in the tourism and hospitality industry receiving a copy. This year's pass featured 34 attraction, tour and restaurant partners – building upon last year's program which featured 18 partners in the attraction and tour sectors. As a vital learning tool, the Frontline Experience Pass ensures Calgary's tourism industry is well informed about, has personally experienced and is capable of recommending things to see and do in Calgary. Initial results show 5,541 offers were redeemed and 6,564 people participated in the program experiences between April 9 and July 31.

Participating partners: Air Canada; BATL Global; Bow Habitat Station; Butterfield Acres; Calaway Park; Calgary Attractions Group; Calgary Hotel Association; Calgary River Experience; Calgary Tower; CalgaryWalks & Bus Tours; Calgary Zoo; Canada's Sports Hall of Fame; Capture The Flag Paintball & Airsoft; Common Crown Brewing Co.; Concorde Group; Eau Claire Distillery; Fiasco Gelato; Fort Calgary; Glenbow Museum; Heritage Park Historical Village; Lougheed House; Prairie Sprinter; River Valley Adventure Co.; Skyline Luge; Studio Bell, home of the National Music Centre; TELUS Spark; The Dandy Brewing Company; The Hanger Flight Museum and The Military Museums. Tourism Calgary is in the process of developing a new frontline education program known as the White Hat Academy. In Q3, Tourism Calgary conducted extensive stakeholder engagement and development work, consulting with more than 75 industry partners to gather input and support for the program. More information about the White Hat Academy is expected to be available before the end of 2018.

Industry events

First Flip Pancake Breakfast

On July 5, Tourism Calgary hosted the first pancake breakfast of the Calgary Stampede season alongside Calgary Arts Development, Calgary TELUS Convention Centre, Calgary Economic Development and the Calgary Downtown Association. Over 4,800 people were in attendance including special guests, The Honourable Rachel Notley and His Worship, Mayor Naheed Nenshi. Throughout the event, attendees were treated to music, entertainment and 100 surprise White Hat Ceremonies. Tourism Calgary and its fellow civic partners are proud to announce that 81.7 per cent of the event remnants were diverted from landfills thanks to support from Green Event Initiative. A special thanks to supporting First Flip partners: Calgary Marriott Downtown, Evans Hunt, FMAV, Hyatt Regency Calgary and Sign Craft.



- Increased proportions of Calgarians believe tourism is an important contributor to Calgary's economy and quality of life*
- Increased proportions of visitors and Calgarians believe Calgary offers shareable experiences*
- *The baseline for new key performance indicators will be developed in 2018.
- 2018 Calgary Frontline Experience Pass
 - Distributed to over 3,500 recipients
 - Featured 35 attraction, tour and restaurant partners
 - 5,541 offers redeemed by 6,564 people
- Grow brand image alignment from 65 per cent to 68 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: 57,327 non-digital partner referrals in 2018
 - Q3: 43,289 non-digital partner referrals
- Increase active frontline participants to 2,000 in 2018 from 1,100 (2017)
- Generate \$870,000 in collaborative marketing support
 - \$767,525 in collaborative marketing support generated to date (2018)
 - Q3: \$423,430 in collaborative marketing support generated

Key Initiatives

Marketing

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Target Audience	Objective	Tactic	Outcome
Repeat visitors In-market Visiting friends and relatives	Drive awareness of things to do and events in Calgary to encourage a repeat trip. Increase awareness amongst Calgarians about things to see and do in their city. Connect the traveller to relevant experiences and facilitate a seamless in-destination experience. Drive awareness of things to do in Calgary to increase visitation of Calgarians' friends and relatives.	 Things To Do program Destination content components including: monthly listicles, holiday guides and micro-guides, concert and life moment itineraries, event-focused editorial, explainer videos. Co-op components including: social media and display ads, content partnerships, native advertising and partner content. General Social Media Promotions across seven channels including social editorial platforms like Instagram Stories, Facebook Live and Snapchat for richer audience engagement. SEM campaign Includes purchased keywords for those actively seeking out Calgary. 	Things To Do destination component• Content performance• 115 content products actively promoted in Q3• Unique page views: 325,336 (+51% year-over-year)• Referrals: 83,821 (+3% year-over-year)• Conversion rate: 22% (- 32% year-over-year)• Average time on page 4.4 minutes (-7% year-over-year)• Video completion rate: 22% (+57% year-over-year)• Video completion rate: 22% (+57% year-over-year)• Video completion rate: 22% (+57% year-over-year)• Ad performance• Click-through rate on destination ads:• Social: 0.77% (+12% year-over-year)• Search engine marketing: 14.67% (+3% year-over-year)• Native: 0.34% (historical comparison unavailable)• Display: 0.32% (+146% year-over-year)• Native: 0.34% (historical comparison unavailable)• Display: 0.32% (+146% year-over-year)• Recom nights• Summer campaign packages: 2,500 (+30% year-over-year)• Revenue generate: \$485,000General social media promotions• New digital connections: 17,692 (+7% year-over-year)• Hashtag uses: 34,203 (+4% year-over-year)• Social media engagements: 430,402 (+41% year-over-year)• Social media engagements: 430,402 (+41% year-over-year)• Click-through rate: 13.39% (+38.24% year-over-year)• Click-through rate: 13.39% (+38.24% year-over-year)• Cost-per-click: \$0.36 (-12.92% year-over-year)
Intercept Alberta	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.	 <u>Sales performance</u> Room nights: 9,524 Revenue: \$1,163,716 <u>Content performance</u> Sessions: 138,517 Referrals: 3,775 Conversion rate: 2.7% Average time on page: 2.53 minutes Video views: 78,997 <u>Ad performance</u> Cost-per-click: \$0.97 Click-through rate: 0.47% *2018 is a benchmarking year for this program
Niche	Convince members of specific communities that Calgary has the experiences they're looking for.	Pilot program targeting photographers, dinosaur enthusiasts and fly- fishers, highlighting experiences that position Calgary as a must visit destination.	 Research validated the niche market potential, leading into a three to five-year campaign to reach niche audiences. Consumer-facing tactics targeting photographers on social media achieved 109,665 social engagements. Itineraries promoting fly fishing and dinosaur experiences reached 5,460 unique page views with an average 3:24 minutes on page. FAM tours for fly-fishing personalities concluded in late August with four media present.