

RESIDENT SURVEY

FEBRUARY 2021

**EXPLORE
EDMONTON**



LAND ACKNOWLEDGEMENT

Explore Edmonton respectfully acknowledges that we are located within Treaty 6 territory, and Métis Nation of Alberta Region 4.

We acknowledge this land as the traditional home for many Indigenous Peoples including the Cree, Blackfoot, Métis, Nakota Sioux, Dene, Saulteaux, Anishinaabe, Inuit and many others whose histories, languages, and cultures continue to influence our vibrant community.



INTRODUCTION

WE ARE EXPLORE EDMONTON

Explore Edmonton Corporation (Explore Edmonton) is Edmonton's visitor economy and venue management organization. We tell Edmonton's story, elevate the Edmonton experience, and generate inbound visitation. With two award-winning venues – the Edmonton Convention Centre and Edmonton EXPO Centre – the know-how to enhance, execute and support major sport and cultural events, and the commitment to develop products and experiences that are authentic to Edmonton, we strive to make the visitor experience unforgettable.

WHY A TOURISM MASTER PLAN FOR EDMONTON?

Explore Edmonton's job is to always be looking at the big picture, leading the way to promote our city as a four-season destination and developing the experiences and partnerships that will position Edmonton as a destination of choice. We are fully aligned to increase

the economic impact of the visitor-based economy in Edmonton.

Not only does the visitor economy create jobs and generate revenue, it also drives awareness to our amazing city, in turn, contributing to our city's local economic vibrancy, future and quality of life.

The plan will help guide Explore Edmonton's experience development initiatives and enable the development of compelling tourist experiences that match visitor expectations and position Edmonton as a year-round destination of choice.

WHY A RESIDENT SURVEY?

The role of destination marketing and management organizations is undergoing profound changes. Explore Edmonton is increasingly becoming responsible for activities beyond attracting greater numbers of visitors. We must be thoughtful about how the quality of life for residents can be balanced with the quality of the visitor experience; about

the kinds of visitors who would most appreciate the destination's character, its people and its offering; and how communities can responsibly grow a tourism industry for the benefit of all.

During this foundational step of the tourism master planning process, the goal is to identify and define general attitudes towards living in Edmonton and tourism's impact on resident quality of life. While desk research is valuable to paint a picture of a destination's broader market opportunities, primary research allows us to ask specific questions:

- What do residents think of Edmonton as a place to live?
- What are the most important attributes of a resident's quality of life?
- How do residents view the tourism industry and its impact on the community?



METHODOLOGY

In consultation with the Explore Edmonton staff, MMGY NextFactor developed an online survey to identify and gauge residents' perceptions on a variety of key characteristics with respect to livability, culture, economy and sense of place.



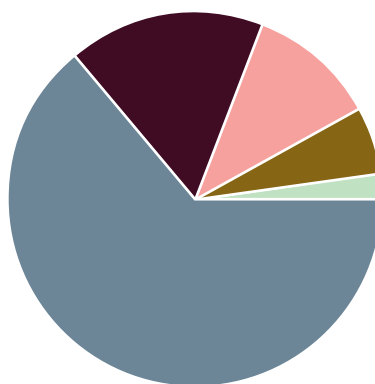
The survey was designed to:

- Assess resident understanding and perception of tourism as an industry and its impact on the community
- Identify assets that may offer potential for increasing the resident quality of life and tourism growth
- Assess the quality and satisfaction with current services, accommodations and amenities throughout the city
- Engage residents in the development phase to accelerate the approval and design process for permanent changes in the future

More than 800 residents of the Edmonton community participated in the survey.

**PERCEPTIONS OF
EDMONTON**

Nearly two-thirds of the respondents have lived in Edmonton for more than 20 years, while 1 in 12 is a new resident having relocated to Edmonton within the last five years.



64%	More than 20 years
17%	11 to 20 years
11%	6 to 10 years
6%	2 to 5 years
2%	Less than 2 years

When asked for the top three words or phrases that come to mind when thinking of Edmonton, the most common responses from residents were: “River Valley,” “Festive,” “Cold,” “Friendly,” and “Winter.”

“River Valley” was mentioned by roughly 40% of residents, demonstrating its significance to Edmonton’s sense of place and contribution to the quality of life of Edmontonians.

The second most commonly mentioned word was “Festive” and was used by roughly 20% of residents to describe the city, alluding to the city’s iconic festivals and reputation as The Festival City.

“Cold” and “Winter” demonstrate the impact of climate on the city’s reputation. The word cloud to the left highlights the words given by residents, with the larger words being suggested more frequently.



IMPORTANCE OF EDMONTON EXPERIENCES

Nearly 9 in 10 Edmonton residents feel that nature and parks are important to their quality of life, followed closely by health and wellness, outdoor activities, festivals and events, dining/ culinary/restaurants. Nightlife and breweries/distilleries/ wineries were listed as the least important attributes to quality of life at 24% and 35% respectively.

Younger residents (aged 18–34), however, were more likely to find nightlife and breweries/distilleries/wineries important, as well as festivals and events and dining/culinary/restaurants. Newer residents who have been in Edmonton for less than five years were more likely to find dining/culinary/restaurants, festivals and events, and the arts important.

How important are the following attributes to your quality of life as a resident of Edmonton?

Percent who replied “Very Important” or “Extremely Important”

Nature and Parks	89%
Health and Wellness	83%
Outdoor Activities	79%
Festivals and Events	77%
Dining/Culinary/Restaurants	74%
Family Activities	64%
The Arts	62%
Historic Sites and Landmarks	59%
Museums	51%
Shopping	46%
Sports Participation and Viewing	43%
Indigenous Culture	40%
Breweries/Distilleries/Wineries	35%
Nightlife	24%





QUALITY OF EDMONTON EXPERIENCES

Festivals and events and nature and parks were rated by Edmonton residents as the highest-quality experiences in the city, followed by dining/culinary/restaurants, outdoor activities and shopping. Indigenous culture and nightlife were rated as the lowest-quality experiences.

How would you rate the overall quality of the following experiences in Edmonton?

Percent who replied "Very Good" or "Excellent"

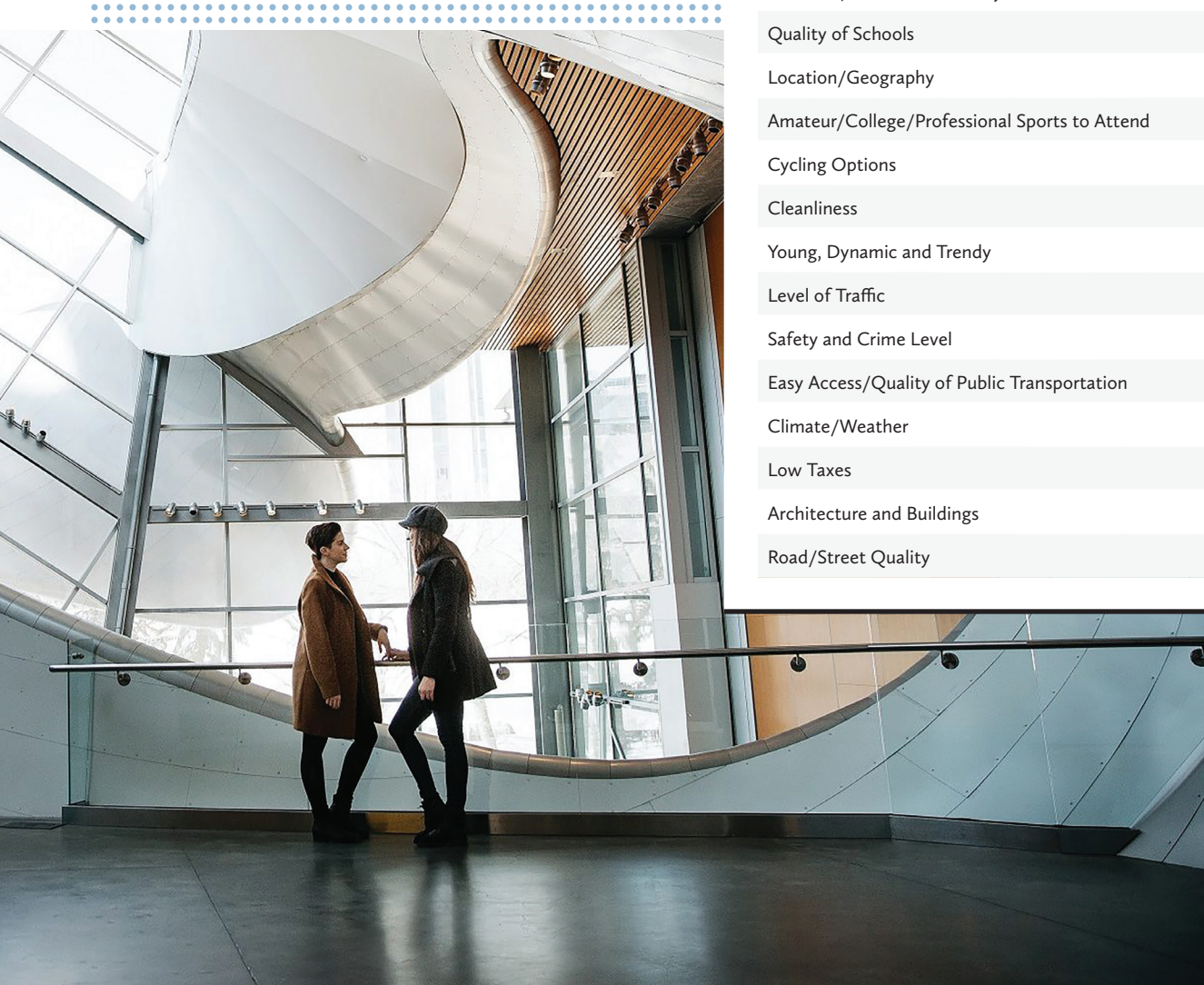
Festivals and Events	79%
Nature and Parks	76%
Dining/Culinary/Restaurants	68%
Outdoor Activities	61%
Shopping	52%
The Arts	52%
Sports Participation and Viewing	49%
Health and Wellness	48%
Family Activities	47%
Museums	42%
Breweries/Distilleries/Wineries	36%
Historic Sites and Landmarks	34%
Nightlife	17%
Indigenous Culture	16%

BEST THINGS ABOUT EDMONTON

Parks/outdoor space/natural scenery were rated as the best thing about living in Edmonton by residents, followed by friendly people, quality and number of local restaurants, easy access to quality healthcare and access to entertainment/arts/culture. Younger residents were more likely to cite cost of living and employment opportunities as the most liked aspects of living in Edmonton, while older residents (over 65) were more likely to cite easy access to quality healthcare, friendly people, availability of recreational opportunities and cleanliness.

What are the best things about living in Edmonton?

	Percent who selected response
Parks/Outdoor Space/Natural Scenery	79%
Friendly People	56%
Quality and Number of Local Restaurants	50%
Easy Access to Quality Healthcare	49%
Access to Entertainment/Arts/Culture	47%
Good Place to Raise a Family	46%
Access to Stores/Retail	43%
Sense of Community	42%
It's a Diverse Place	41%
Availability of Recreational Opportunities	38%
Not Crowded	38%
Cost of Living	38%
Employment Opportunities	31%
Walkable/Pedestrian Friendly	29%
Quality of Schools	27%
Location/Geography	23%
Amateur/College/Professional Sports to Attend	21%
Cycling Options	21%
Cleanliness	20%
Young, Dynamic and Trendy	17%
Level of Traffic	16%
Safety and Crime Level	16%
Easy Access/Quality of Public Transportation	15%
Climate/Weather	14%
Low Taxes	13%
Architecture and Buildings	9%
Road/Street Quality	5%



LEAST LIKED THINGS ABOUT EDMONTON

Road/street quality, homelessness and climate were listed as the least liked aspects of living in Edmonton. Younger residents were more likely to list limited access/quality of public transportation as a least liked aspect of living in Edmonton, while older residents were more likely to list politics/local government.

What do you like least about living in Edmonton?

	Percent who selected response
Road/ Street Quality	56%
Homelessness	51%
Climate/Weather	50%
Safety and Crime Level	38%
Politics/Local Government	32%
Limited Access/Quality of Public Transportation	31%
Location/Geography	23%
Cost of Living	21%
Level of Traffic	21%
Cleanliness	20%
Limited Employment Opportunities	14%
Other (please specify)	13%
Housing Availability	11%
Limited Cycling Options	10%
No Sense of Community	10%
Unfriendly People	7%
Limited Access to Entertainment, Arts and Culture	5%
It's Crowded	4%
It's Not a Diverse Place	4%
Limited Access to Recreational Opportunities	4%
Limited Access to Stores/Retail/Restaurants	4%
Bad Place to Raise a Family	3%
Limited Parks/Outdoor Space/Natural Scenery	3%
Quality of Schools	3%



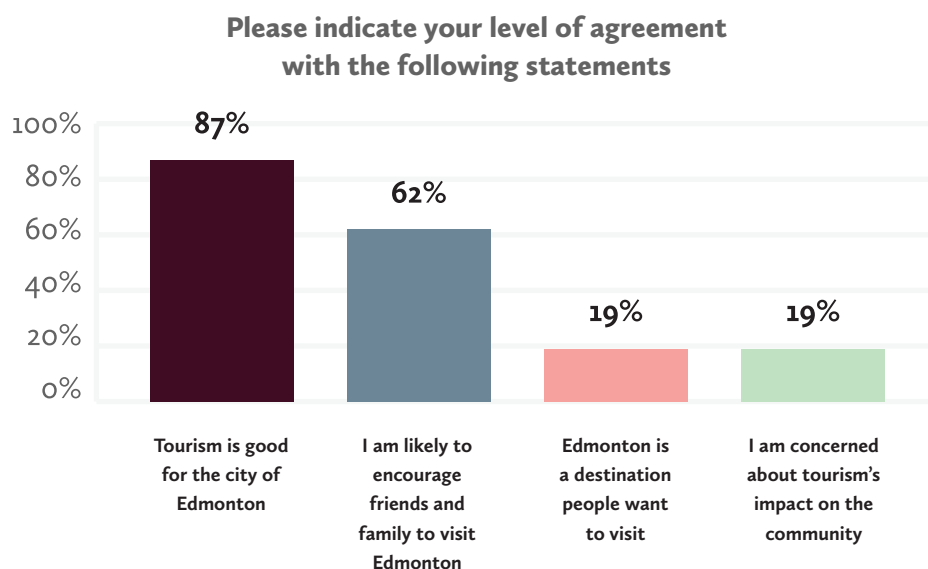
PERCEPTIONS OF TOURISM

EDMONTON AS A TOURISM DESTINATION

Roughly 9 in 10 (87%) residents agree that tourism is good for the city of Edmonton.

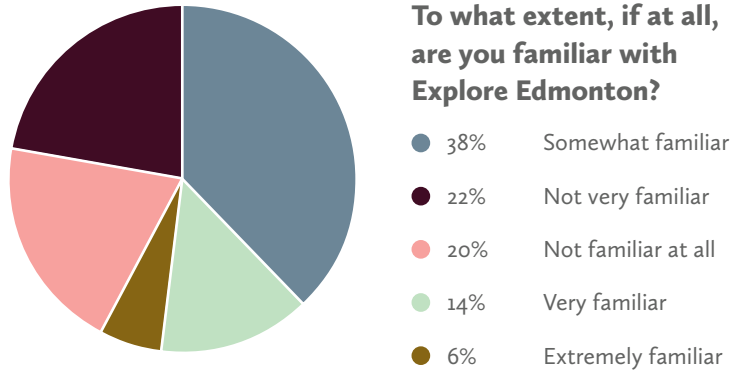
While more than 60% of residents indicated they are likely to encourage friends and family to visit the city, less than 20% of Edmontonians agree that Edmonton is a destination people want to visit. Older residents (over 65) were more likely to agree that Edmonton is a destination people want to visit (29%), while younger residents (18–34) were less likely to agree (13%).

Two in 10 residents say they are concerned about tourism's impact on the community.



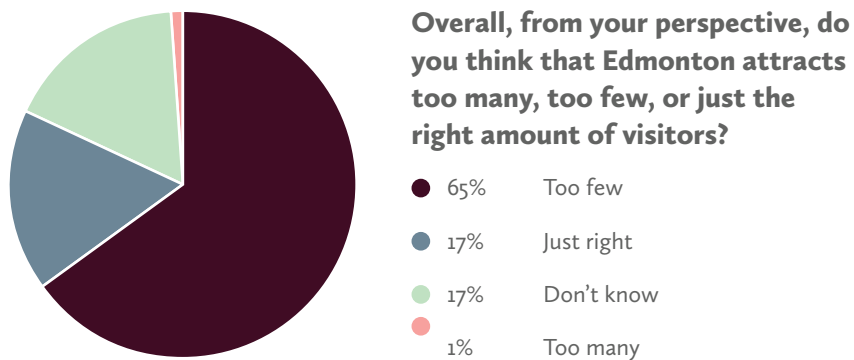
FAMILIARITY WITH EXPLORE EDMONTON

Roughly 40% of residents say they are somewhat familiar with Explore Edmonton, while 20% say they are either extremely familiar or very familiar with the organization. Twenty percent of residents say they are not familiar at all with Explore Edmonton, demonstrating an opportunity for greater public awareness.



NUMBER OF VISITORS

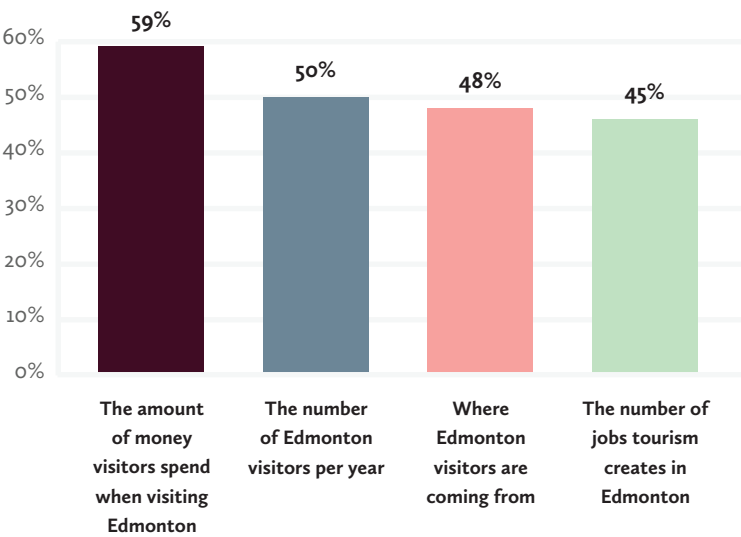
Two-thirds of residents feel that Edmonton should be attracting more visitors, while 17% feels the number is just right. Less than 1% of residents surveyed indicated that Edmonton is currently attracting too many visitors to the destination.



AWARENESS OF TOURISM

Nearly 60% of Edmonton residents indicated that they are not at all aware of the amount of money visitors spend when visiting the city, and roughly half had no awareness of the number of annual visitors to the city, where visitors are coming from or the number of jobs tourism creates in Edmonton. This data demonstrates the need to better engage and educate Edmontonians on tourism and the visitor economy.

Please indicate your level of awareness of the following topics:



IMPACTS OF TOURISM

More than 80% of Edmonton residents agree that tourism creates opportunities for local businesses and that tourism creates employment opportunities for residents.

Three-quarters agree that tourism brings in new amenities and attractions that local residents can also enjoy; nearly 75% agree that tourism generates tax revenues for national, provincial and local governments; and similarly, nearly 75% agree that tourism helps create... and is an important factor in making our community a great place to live.

One in 7 residents agrees that tourism creates traffic congestion problems for local residents, and 1 in 10 agrees that tourism negatively impacts the city's natural resources.

From your perspective, to what extent do you agree or disagree with each of these statements? Tourism to Edmonton...

	Percent who replied "Agree" or "Strongly Agree"
Creates opportunities for local businesses	87%
Creates employment opportunities for residents	82%
Brings in new amenities and attractions that local residents can also enjoy	75%
Generates tax revenues for national, provincial and local governments	73%
Helps create a positive ambiance/vibe in the local community	73%
Is an important factor in making our community a great place to live	71%
Reduces taxes for residents (ex. property taxes)	25%
Causes local restaurant and entertainment prices to rise	15%
Creates traffic congestion problems for local residents	14%
Negatively impacts our natural resources	9%

EXPLORE EDMONTON

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