

DESTINATION **NEXT**

MULTI-USER DIAGNOSTIC ASSESSMENT: EDMONTON, AB

January 2020

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.

WE ARE EXPLORE EDMONTON



Explore Edmonton Corporation (Explore Edmonton) is Edmonton's visitor economy and venue management organisation. 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 developing 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.

WHAT'S INCLUDED IN THIS DESTINATION ASSESSMENT REPORT?

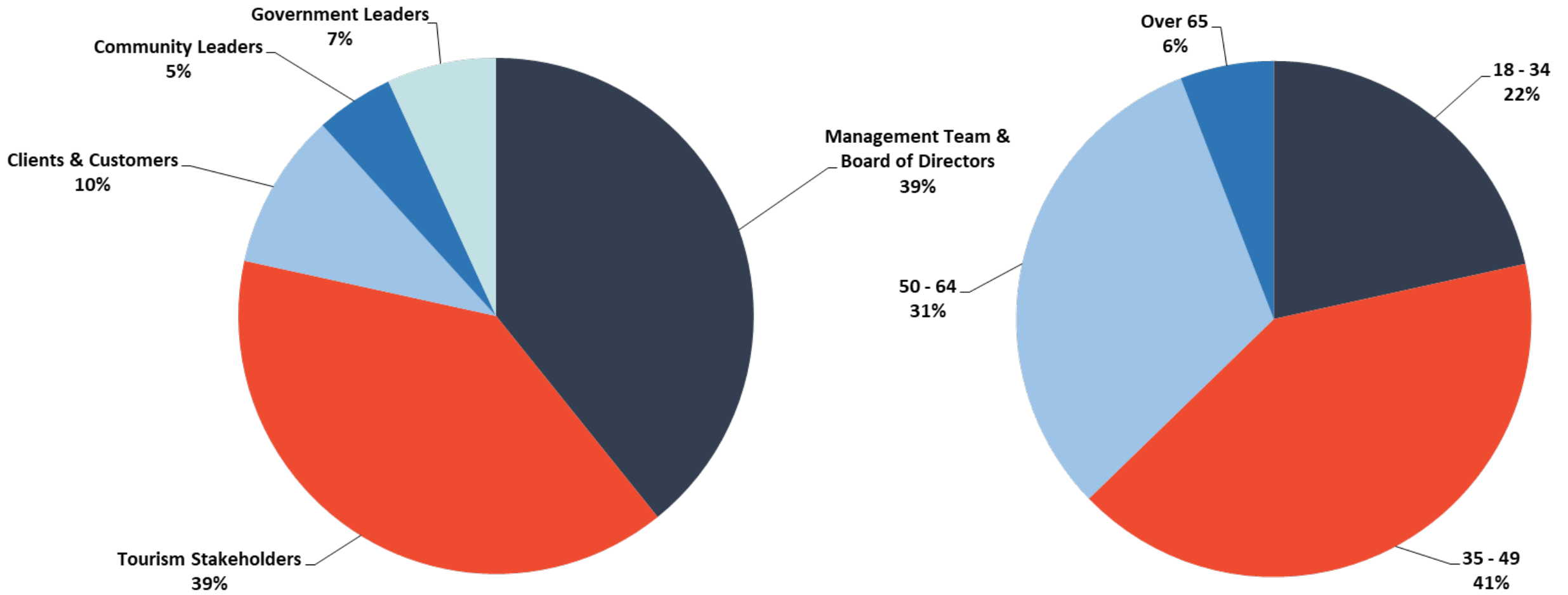
MMGY NextFactor conducted a detailed assessment of Edmonton's visitor economy, utilising a comprehensive stakeholder survey that measures destination strength and community engagement based on a series of 20 variables.

The results were then used to plot Edmonton into a scenario model, which shows the specific opportunities for Explore Edmonton and their partners to build upon.

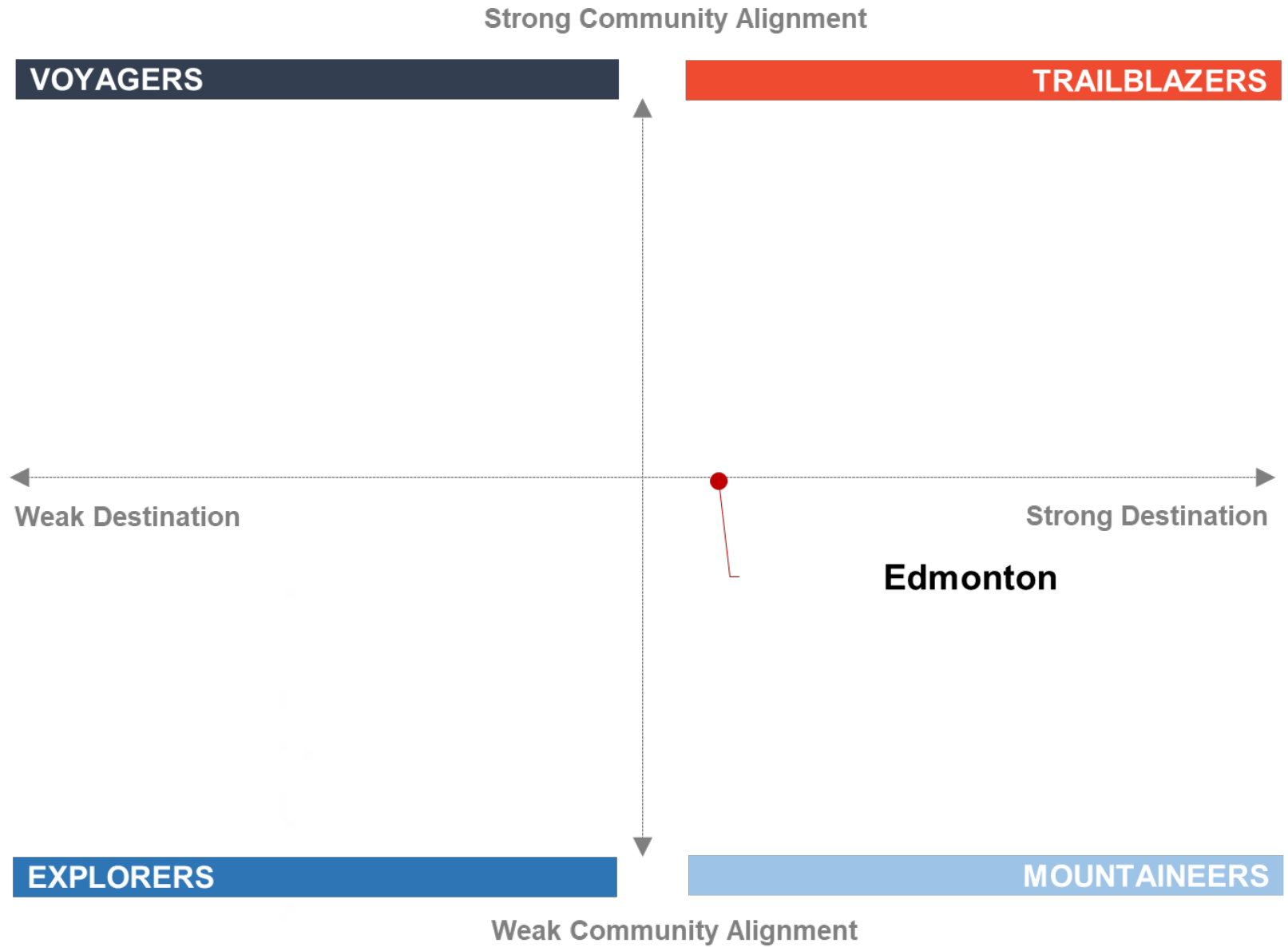
This assessment is the only one of its kind in the tourism and business events industry today. It has been utilized by more than 250 destinations around the world.

DEMOGRAPHIC BREAKDOWN OF RESPONSES

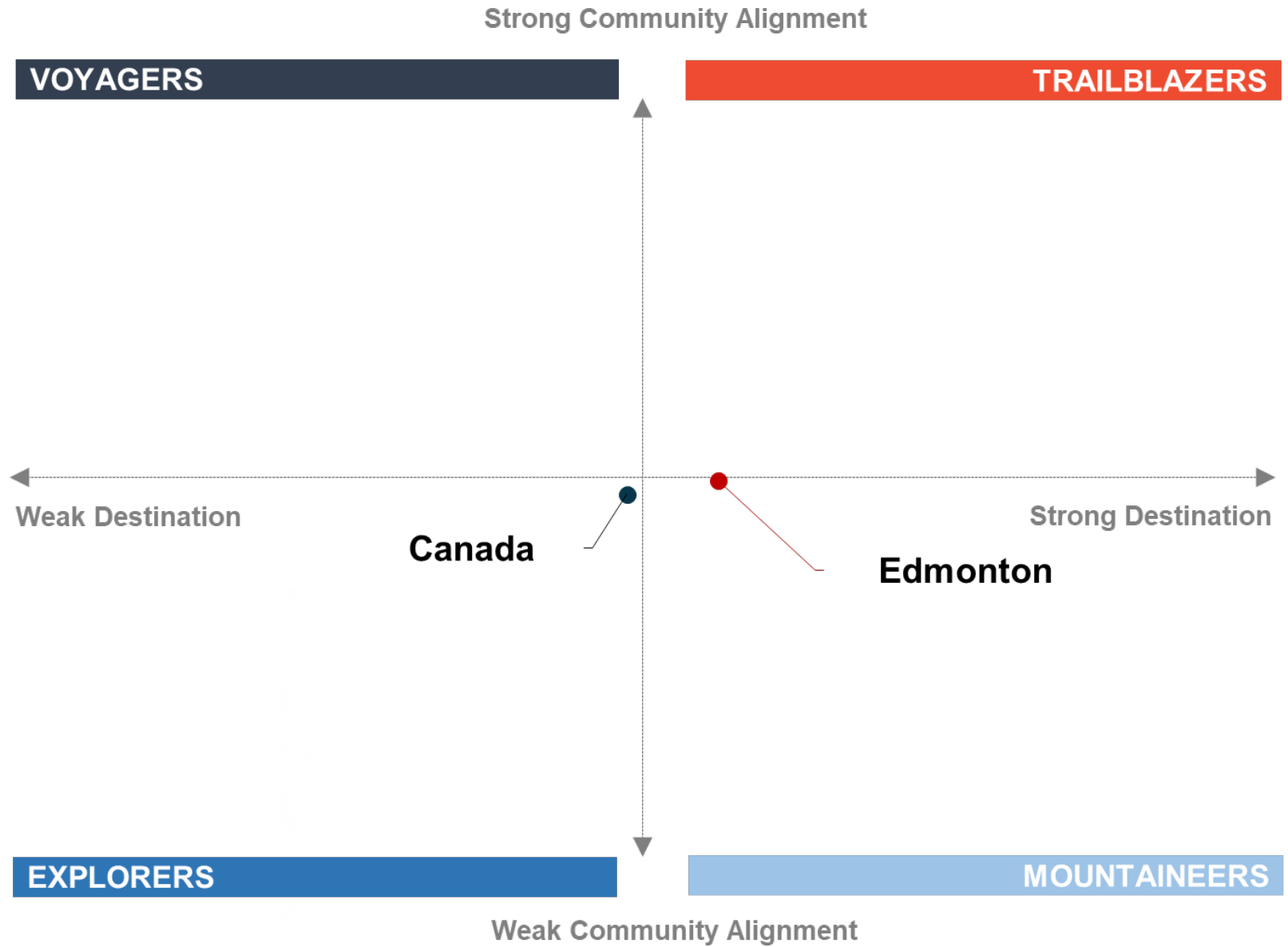
A total of 102 individuals responded to the survey, as broken down below.



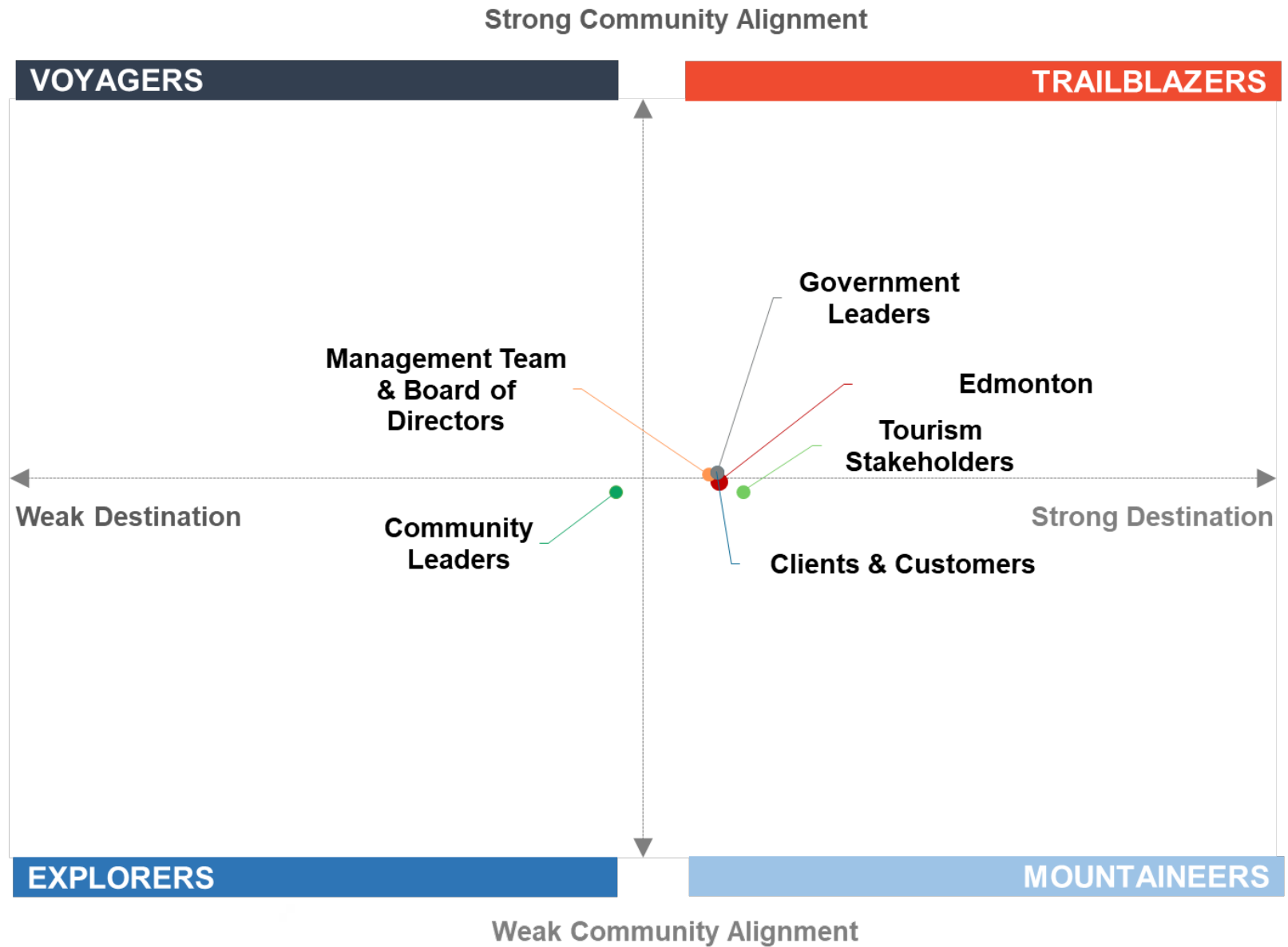
OVERALL ASSESSMENT



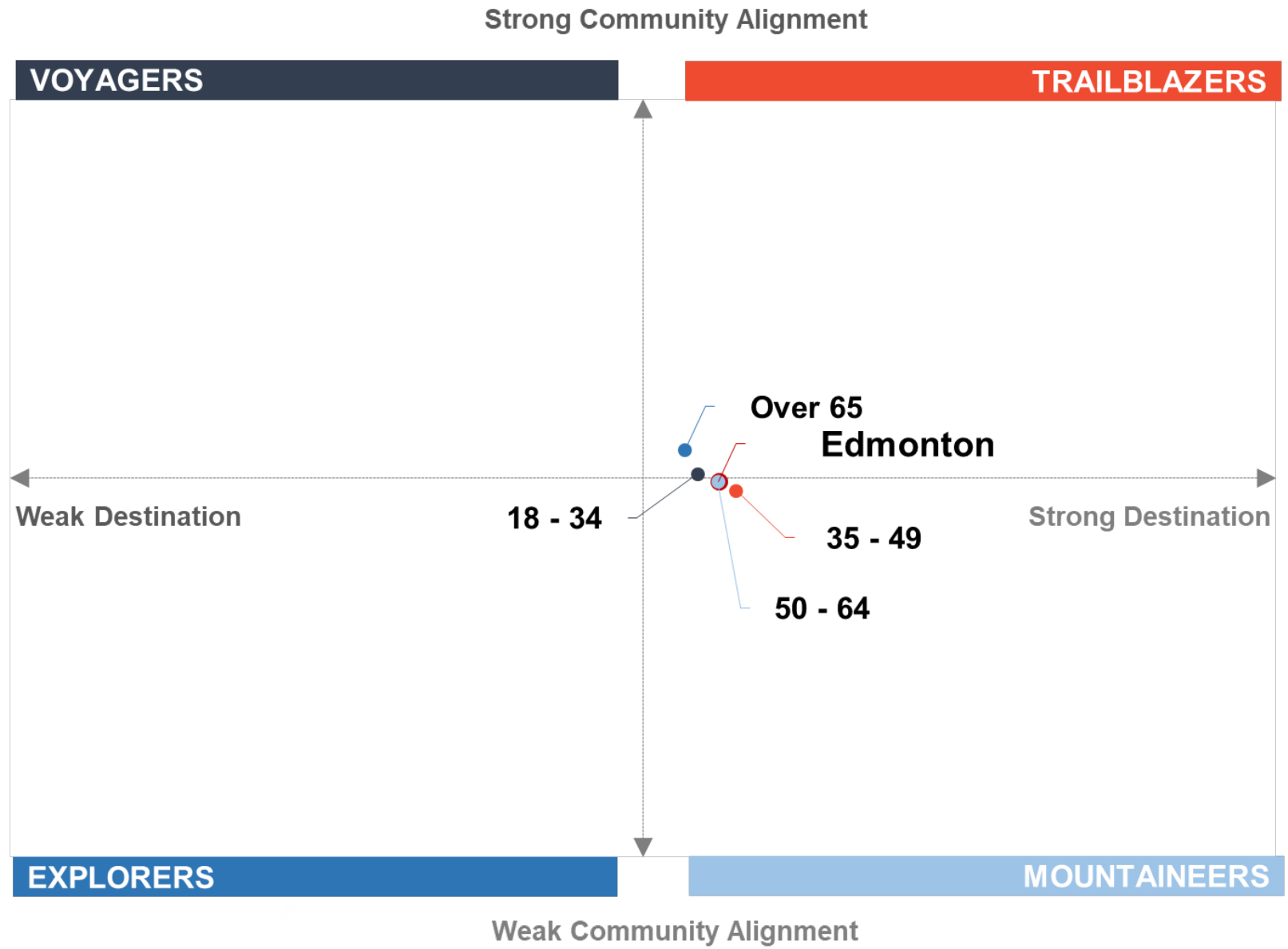
OVERALL ASSESSMENT



STAKEHOLDER GROUPS


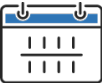




AGE GROUPS



DESTINATION STRENGTH RANKINGS



		Relative Importance	Perceived Performance
	Attractions & Entertainment	1 st	3 rd
	Events	2 nd	2 nd
	Brand	3 rd	7 th
	Outdoor Recreation & Sports Facilities	4 th	1 st

DESTINATION STRENGTH – REPORT CARD

Variable	Relative Importance (0-100%)		Perceived Performance (1-5 scale)		
	Industry Average	Edmonton	Industry Average	Edmonton	Standard Deviation
Attractions & Entertainment	10.8%	10.2%	3.6	3.9	0.5
Events	9.8%	10.1%	3.6	3.9	0.4
Brand	10.4%	10.1%	3.5	3.4	0.6
Outdoor Recreation & Sports Facilities	9.5%	10.1%	3.2	4.1	0.5
Destination Access	9.1%	10.1%	3.1	3.3	0.6
Convention & Meeting Facilities	9.8%	9.9%	3.1	3.7	0.6
International Readiness	10.0%	9.9%	3.1	3.0	0.6
Mobility & Access	10.1%	9.9%	3.0	3.3	0.5
Accommodation	10.5%	9.9%	3.5	3.9	0.5
Communication & Internet Infrastructure	10.0%	9.8%	3.2	3.6	0.5
DESTINATION STRENGTH - Edmonton					3.60
INDUSTRY AVERAGE DESTINATION STRENGTH					3.36
RESULTING SCENARIO			MOUNTAINEERS		

Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

DESTINATION STRENGTH – STAKEHOLDER REPORT CARD

Variable	Perceived Performance (1-5 scale)					
	Edmonton	Management Team & Board of Directors	Tourism Stakeholders	Clients & Customers	Government Leaders	Community Leaders
Attractions & Entertainment	3.9	3.9	3.9	3.9	3.6	3.6
Events	3.9	3.9	3.9	3.8	4.1	3.2
Brand	3.4	3.3	3.5	3.5	3.3	3.0
Outdoor Recreation & Sports Facilities	4.1	4.1	4.1	3.8	4.0	4.3
Destination Access	3.3	3.3	3.4	3.3	3.3	2.9
Convention & Meeting Facilities	3.7	3.7	3.9	3.8	3.6	3.2
International Readiness	3.0	2.8	3.1	2.9	2.9	2.6
Mobility & Access	3.3	3.3	3.4	3.3	3.3	3.1
Accommodation	3.9	3.8	4.0	3.8	3.9	3.5
Communication & Internet Infrastructure	3.6	3.6	3.6	3.7	3.9	3.4
DESTINATION STRENGTH - Edmonton						3.60
INDUSTRY AVERAGE DESTINATION STRENGTH						3.36
RESULTING SCENARIO						MOUNTAINEERS

Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

ATTRACTIONS & ENTERTAINMENT



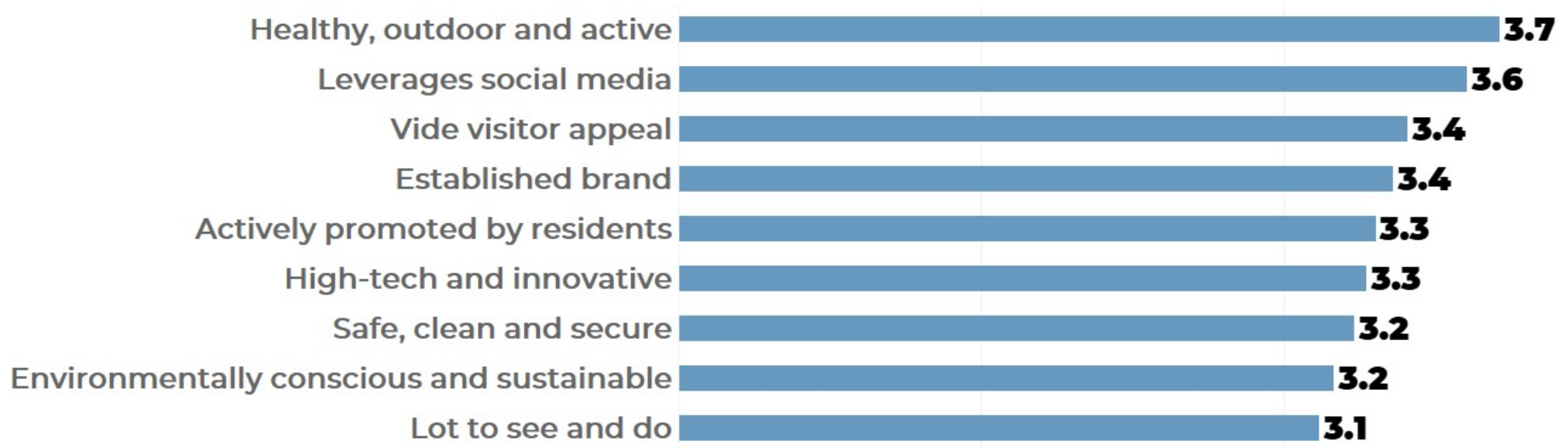
Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

EVENTS



Note

Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

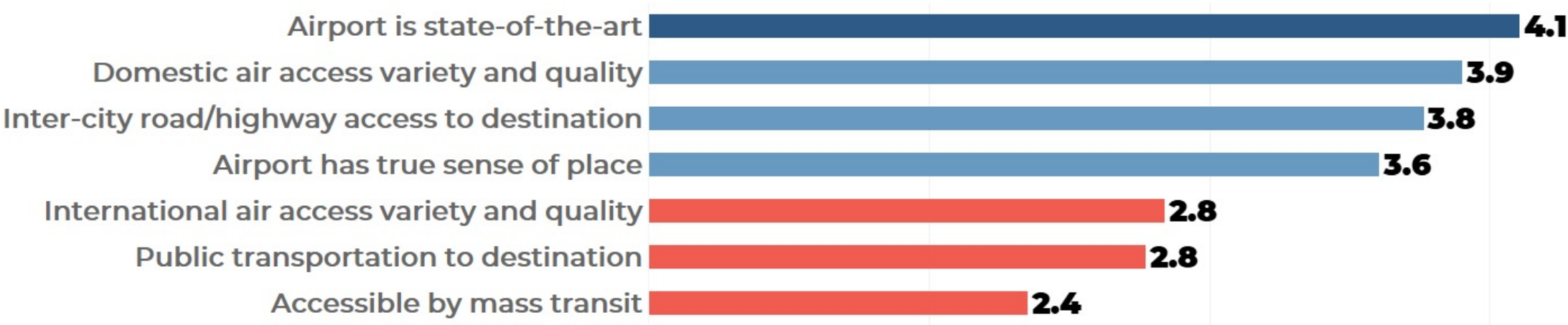


OUTDOOR RECREATION & SPORTS FACILITIES



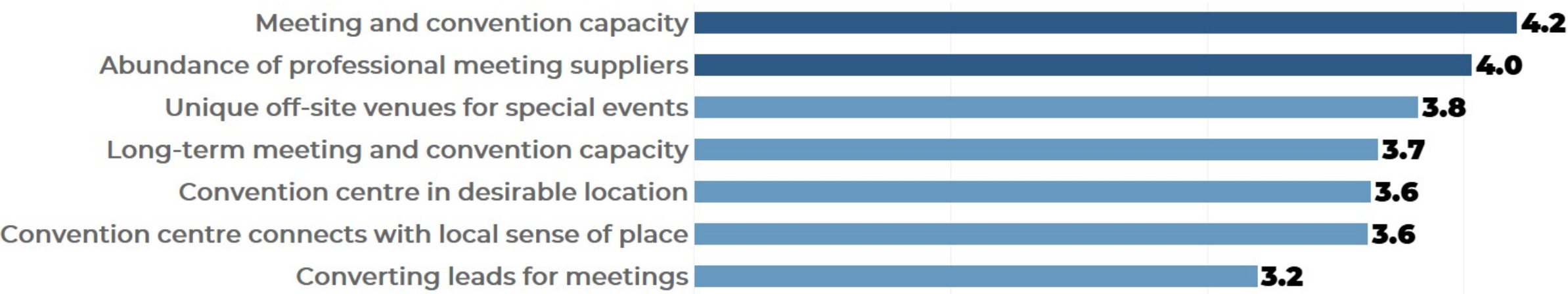
Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

DESTINATION ACCESS



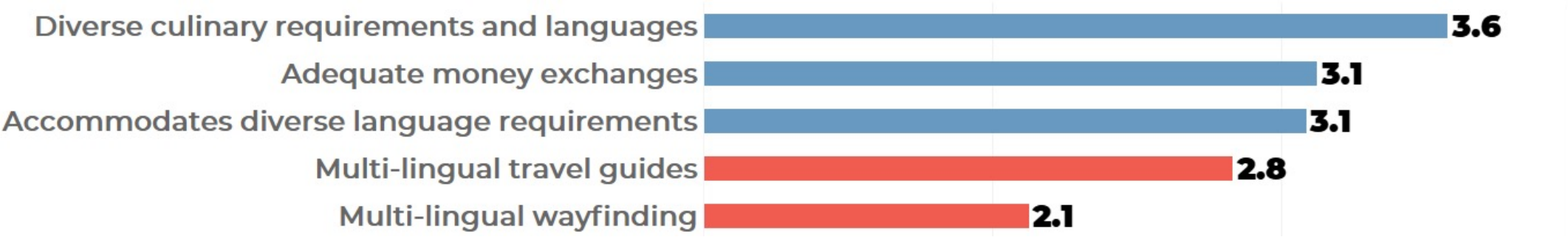
Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

CONVENTION & MEETING FACILITIES



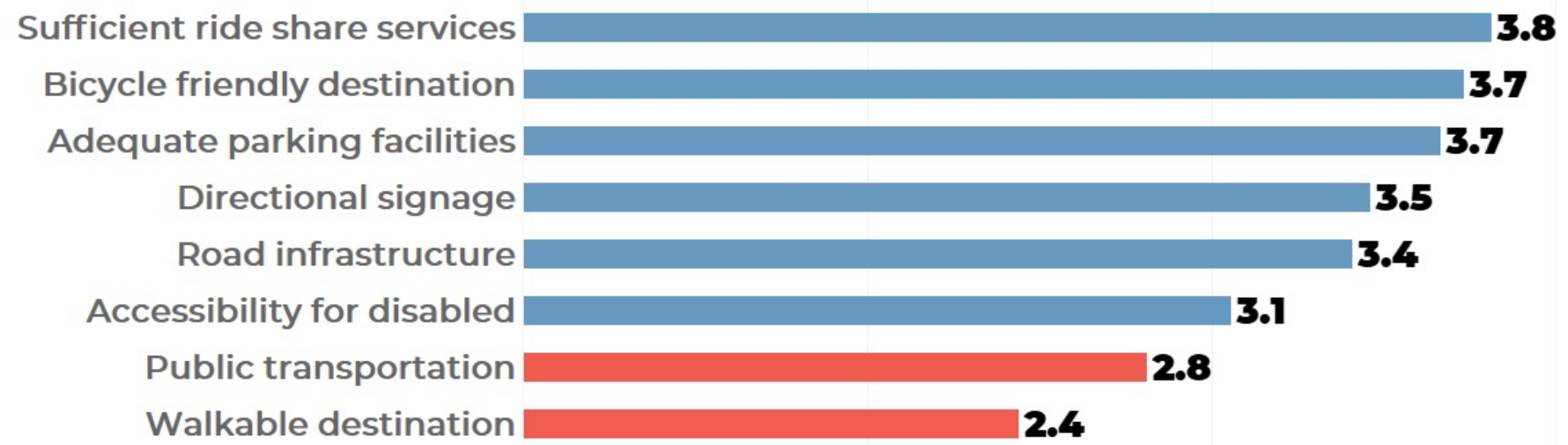
Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

INTERNATIONAL READINESS

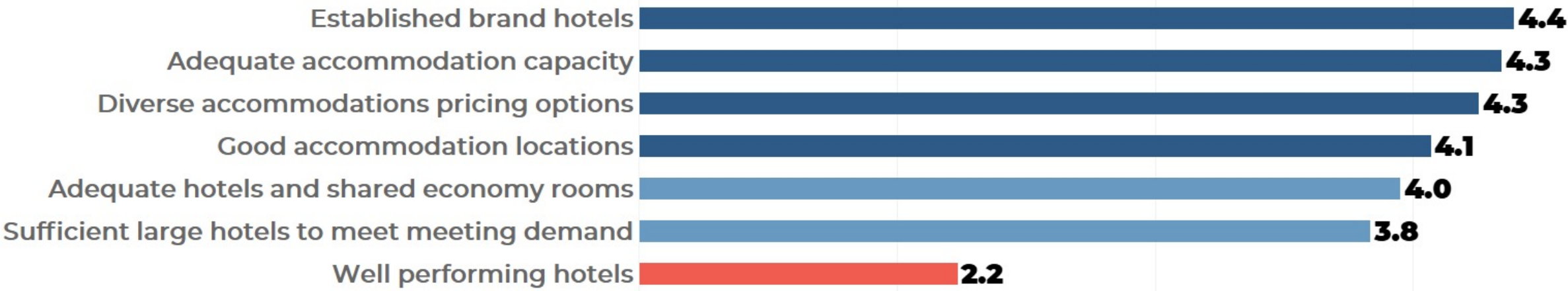


Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

MOBILITY & ACCESS



ACCOMMODATION



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree





COMMUNICATION & INTERNET INFRASTRUCTURE



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

COMMUNITY ALIGNMENT RANKINGS



		Relative Importance	Perceived Performance
	Funding Support & Certainty	1 st	10 th
	Partnership Strength	2 nd	5 th
	Hospitality Culture	3 rd	2 nd
	Policy & Regulatory Environment	4 th	8 th

COMMUNITY ALIGNMENT – REPORT CARD

Variable	Relative Importance (0-100%)		Perceived Performance (1-5 scale)		
	Industry Average	Edmonton	Industry Average	Edmonton	Standard Deviation
Funding Support & Certainty	10.1%	10.8%	3.2	2.3	0.8
Partnership Strength	9.1%	10.0%	3.5	3.8	0.5
Hospitality Culture	10.3%	10.0%	3.6	3.9	0.6
Policy & Regulatory Environment	10.1%	10.0%	3.5	3.6	0.6
Economic Development	10.3%	9.9%	3.9	3.7	0.7
Local Community Support	10.3%	9.9%	3.5	2.9	0.7
Workforce	10.2%	9.9%	3.2	3.8	0.5
Sustainability	0.0%	9.9%	0.0	4.0	0.4
Organization Governance Model	9.5%	9.8%	3.7	3.7	0.6
Regional Cooperation	10.1%	9.8%	3.6	3.8	0.7
COMMUNITY ALIGNMENT - Edmonton					3.53
INDUSTRY AVERAGE COMMUNITY ALIGNMENT					3.55
RESULTING SCENARIO			MOUNTAINEERS		

Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

COMMUNITY ALIGNMENT – STAKEHOLDER REPORT CARD

Variable	Perceived Performance (1-5 scale)					
	Edmonton	Management Team & Board of Directors	Tourism Stakeholders	Clients & Customers	Government Leaders	Community Leaders
Funding Support & Certainty	2.3	2.1	2.4	2.7	1.8	2.0
Partnership Strength	3.8	3.9	3.7	3.8	3.9	3.7
Hospitality Culture	3.9	4.0	3.8	3.7	3.7	3.9
Policy & Regulatory Environment	3.6	3.6	3.6	3.7	4.0	3.2
Economic Development	3.7	3.6	3.6	3.8	3.8	4.3
Local Community Support	2.9	2.9	2.9	3.3	2.9	2.1
Workforce	3.8	3.8	3.9	3.8	3.9	4.0
Sustainability	4.0	4.0	3.9	3.9	4.1	3.8
Organization Governance Model	3.7	3.9	3.5	3.7	3.9	3.9
Regional Cooperation	3.8	4.0	3.6	3.7	4.1	4.0
COMMUNITY ALIGNMENT - Edmonton						3.53
INDUSTRY AVERAGE COMMUNITY ALIGNMENT						3.55
RESULTING SCENARIO						MOUNTAINEERS

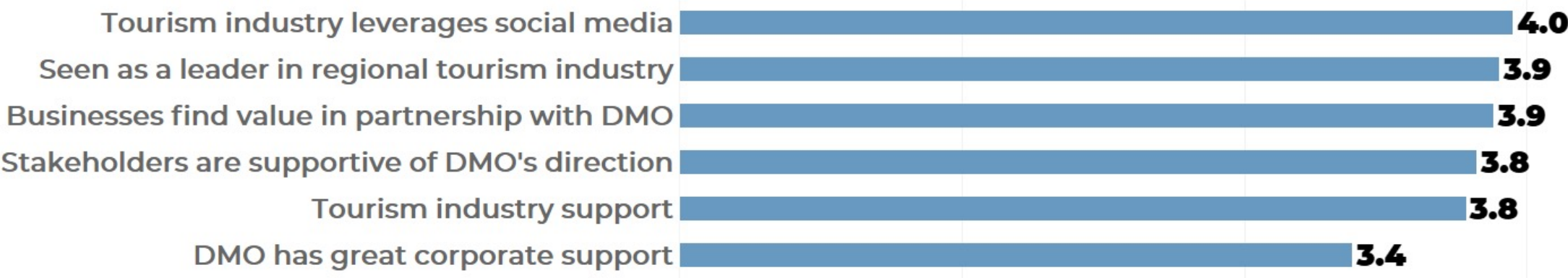
Note
Green signifies **overperforming** by greater than 0.2.
Yellow signifies **underperforming** by greater than 0.2 but less than 0.4.
Red signifies **underperforming** by greater than 0.4.

FUNDING SUPPORT & CERTAINTY



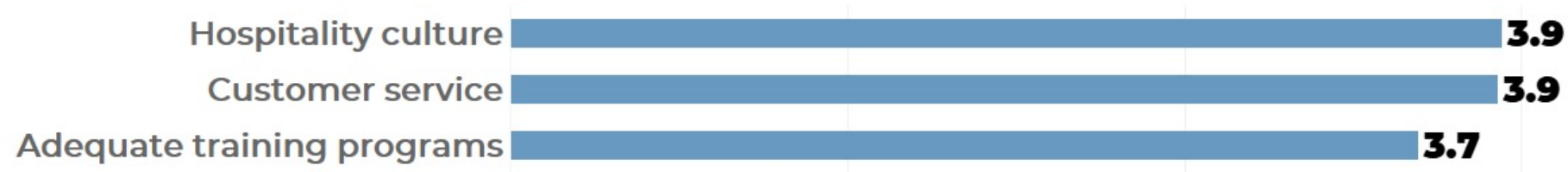
Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

PARTNERSHIP STRENGTH



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

HOSPITALITY CULTURE



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

POLICY & REGULATORY ENVIRONMENT

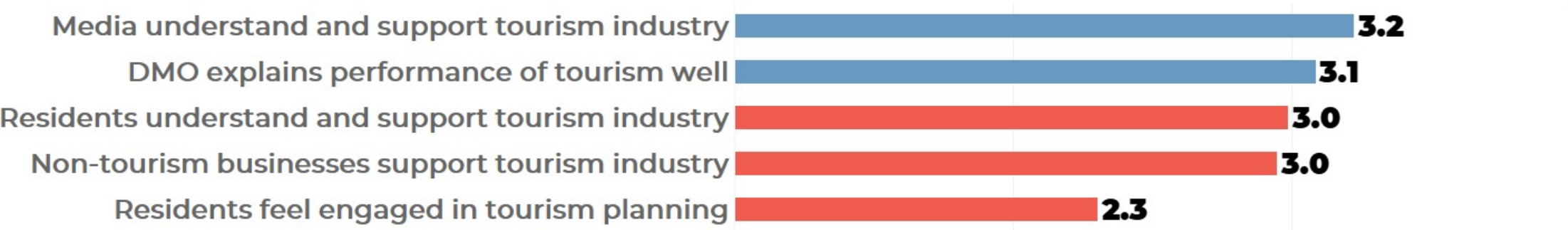


Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

ECONOMIC DEVELOPMENT



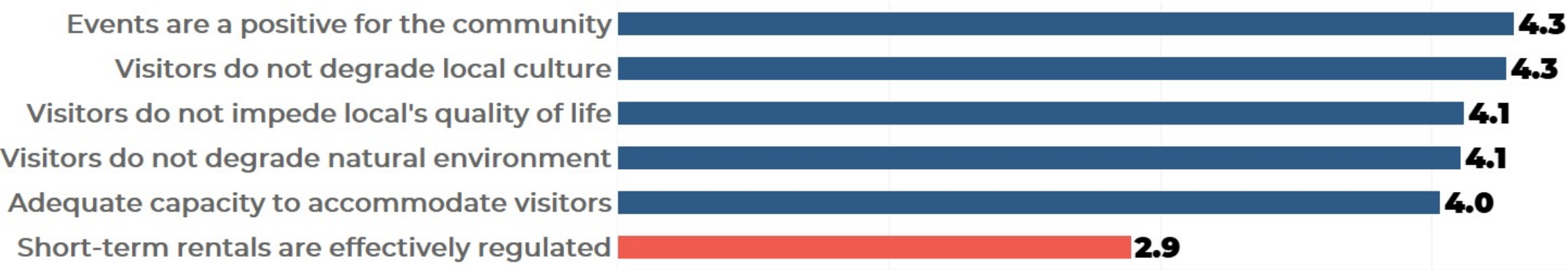
LOCAL COMMUNITY SUPPORT



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

ORGANIZATION GOVERNANCE MODEL



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

REGIONAL COLLABORATION



Note
Scale 1 – 5: 1 – Strongly Disagree; 5 – Strongly Agree

KEY TAKEAWAYS

- Currently in the mountaineers quadrant with above industry average destination strength and below industry average community alignment
- Stakeholders are mostly aligned on perceptions about destination

Destination Strength - Opportunities for Improvement

- Iconic attractions
- Unique neighborhoods
- Iconic event
- Financial support for events
- Lots to see and do
- Being known as environmentally conscious
- Safe and secure destination
- Promoted by residents
- Brand appeal
- Outdoor recreation suppliers
- Mass transit accessibility
- International air access
- Converting leads for meetings
- Well performing hotels
- International readiness
- Walkability
- Road infrastructure
- Wi-fi in public spaces

Community Alignment - Opportunities for Improvement

- Funding support & stability
- Corporate support
- Training programs
- Advocacy program
- Resident engagement & support
- Businesses and media support for tourism
- DMO programs with educational institutions
- Short-term rental regulation
- Visitor performance tracking

WHAT ONE THING COULD THE DESTINATION DO TO BECOME A BETTER OR WORLD-CLASS VISITOR DESTINATION?

Destination Access & Mobility (34%)

- Become a more walkable, pedestrian-oriented city with interesting streets and public spaces to explore.
- People arriving at EIA need to be transported through the unappealing Gateway Blvd to get downtown. It takes 40 minutes. Same when they leave. For a city this size, that's not "world-class".
- Public transportation for visitors to main attractions... and residents could use it too.
- Have better air access from the US, Europe and Asia.
- Lobby for improved direct air access to/from Europe and the US.

Attractions & Events (21%)

- Create more iconic attractions that visitors would enjoy year-round, particularly in winter. Ice district and new arena area positive step.
- Develop a high profile, iconic attraction or event with stability.
- Host major international sport and cultural events.
- We need a "SIGNATURE" event. Usually in the sports field but some form of Cultural or World-class event. We have lost Rodeo and the Indy-car races with no replacements.
- Needs a major anchor experience that attracts visitors as the sole reason of coming here.

Brand & Marketing (10%)

- Create a more engaging brand.
- Raise the international profile of festivals like Fringe and Folk.
- Drive the 'All-In' message and accept that we can be a top tier-2 city.
- Promote its river valley more aggressively and packaged as a destination.
- Target the appropriate market, set realistic goals (we are NOT nor will we ever be a WORLD CLASS destination), but that doesn't mean we cannot still knock it out of the park with more realistic goals.