

CIVIC PARTNER 2020 ANNUAL REPORT SNAPSHOT- TOURISM CALGARY-CONVENTION AND VISITORS BUREAU

TOURISM CALGARY-CONVENTION AND VISITORS BUREAU (TOURISM CALGARY)

Mandate: Increase the economic impact of the tourism economy to Calgary.

Mission: Inspire more people to visit Calgary for memorable experiences.

Vision: To be the Ultimate Host City.

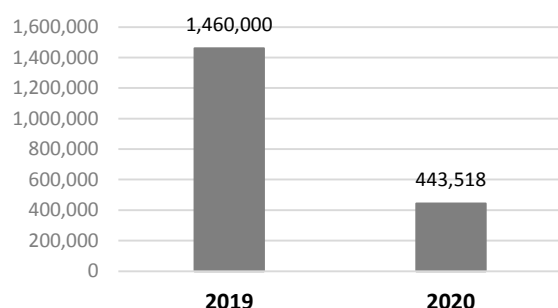
2020 City Investment

Operating Grant: \$2,777,001

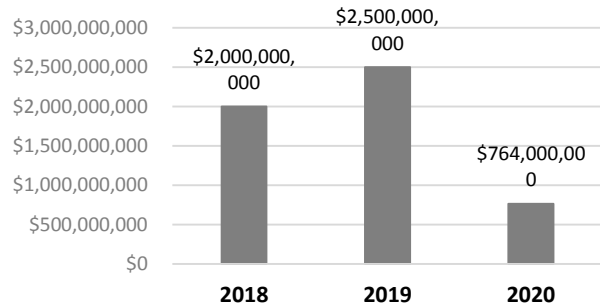
Special Events Fund: \$966,000

2020 Results

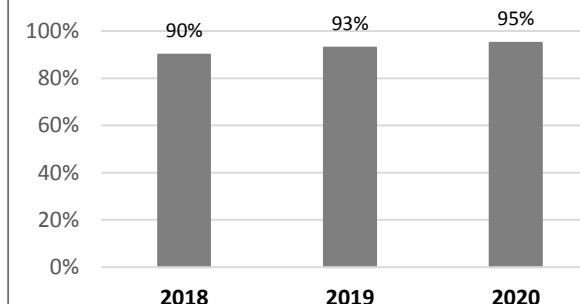
Referrals to Industry Partners



Economic Impact of Visitors



Effective Industry Champion



The story behind the numbers

- Tourism Calgary is supporting partners by driving business through referrals from www.visitcalgary.com and virtual in-destination counselling services.
- With the severe impact of COVID-19 on tourism, visitor spending dropped an estimated 59 per cent from \$2.5 billion in 2019 to approximately \$764 million in 2020.
- Tourism Calgary had overwhelming support of its stakeholders and achieved a record number of paid partners (780) in 2020.

Current state 2021: COVID-19 impact

- Due to the impact of COVID-19 on tourism, Tourism Calgary's majority funder, the Calgary Hotel Association reduced funding support in 2020 and will decrease support significantly in 2021.
- Shifted marketing programs to focus locally to help build Calgarian's confidence in local experiences, and supporting local businesses.
- Updating *Calgary's Destination Strategy: Ultimate Hosts. Ultimate Host City.* to focus on rebuilding. As of April 28, 2021 only 40 per cent of Tourism Calgary's partners have reopened their doors, and many are at risk of failing due to lost revenue.

Service impact: Severe (Unable to meet normal objectives due to serious extended disruption).

Current demand for service: Demand has decreased notably



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Organizational Structure: Independent External Organization

Fiscal Year: Ended December 31, 2020

STRUCTURE

1. Vision, Mission and Mandate:

Mandate: Increase the economic impact of the tourism economy to Calgary.

Mission: Inspire more people to visit Calgary for memorable experiences.

Vision: Make Calgary the ultimate host city.

2020 RESULTS

2. What key results did your organization achieve in 2020 that contributed to one or more of the [One Calgary Citizen Priorities](#)? (*A Prosperous City, A City of Safe & Inspiring Neighbourhoods, A Healthy and Green City, A Well Run City*)

2020 was an extremely challenging year for Calgary's tourism industry, however Tourism Calgary's efforts contributed to the One Calgary Citizen Priorities by supporting the local economy by driving business to partners, encouraging exploration in our neighbourhoods and staying safe, thanks to a strong strategic focus on driving business to partners, supporting their innovation and advocating on their behalf.

Despite the challenges, ongoing collaboration with industry partners resulted in:

- Driving hyper-local awareness, business and support for industry partners through marketing efforts informed by the *That's the Spirit* brand platform that garnered more than 1.8 million sessions on visitcalgary.com and 1.7 million social media engagements.
- Securing Calgary as the host city for Curling Canada's 2021 event bubble. Hosted in a no-fans, safe environment at WinSport, the seven prestigious curling events are estimated to generate \$13 million in economic impact while driving safe business activity and keeping Calgary top-of-mind for future travel through extensive broadcast on TSN and Sportsnet.
- Working with our venue and hotel partners to secure 55 meetings and conventions for future years. Half of these programs represent new group business, while the other half are re-booked events originally scheduled for 2020 or 2021. About 45 per cent of business disrupted by the pandemic was re-booked for future dates, with others in the process of rescheduling.
- Influencing local spending through more than 440,000 referrals to industry partners and through activating new initiatives like the digital #LoveYYC Deals Pass, which provided Calgarians with savings offers for local restaurants, attractions, hotels, tours and more.
- Articulating the needs of our industry - including the urgent need for supports like HASCAP, CEWS and CERB - to all orders of government alongside Travel Alberta, Destination Canada, TIAC and TIAA. Tourism Calgary was also a leader in providing industry with access to COVID-19 response and recovery experts, information and resources.



TOURISM CALGARY Civic Partner 2020 Audit Report

Other key metrics include:

- **95 per cent** of stakeholders believe Tourism Calgary is an effective champion for industry, up 2 percent over 2019.
- **1,863,840** sessions on visitcalgary.com;
- **87,841,838** earned media impressions from consumer-focused coverage featuring Calgary as a destination of choice and **416,289, 826*** earned media impressions from corporate-focused coverage that generated awareness about Calgary's critical tourism industry and the impacts of the COVID-19 pandemic on tourism;
- A record **780** industry partners, up 6.4 per cent over 2019.

Tourism Calgary continues to implement Calgary's Destination Strategy: *Ultimate Hosts. Ultimate Host City* in meaningful ways.

3. **Briefly describe how your key results in 2020 contributed to Council approved strategies (Select up to three that are most applicable.)** For example: Calgary in the new economy: An economic strategy for Calgary; Calgary Heritage Strategy; Climate Resiliency Strategy; Resilient Calgary; Enough for All poverty reduction strategy; Cultural Plan for Calgary; Downtown Strategy; Calgary's Corporate Affordable Housing Strategy; Open Spaces Plan; Recreation Master Plan; Sport for Life Policy.

As a key partner in the Place pillar of Calgary in the New Economy, Tourism Calgary serves on the advisory committee and contributes through the ongoing stewardship of the Destination Strategy, which resulted in advocacy for all aspects of the development of the destination.

Tourism Calgary is a key partner in several Downtown Strategy initiatives, including the Downtown Strategy Working Group, Chinook Blast and the 9 Block Project. The Downtown Strategy is supported by the Destination Strategy and is an important component to creating a safe and vibrant core for Calgarians and visitors.

Tourism Calgary supports the Recreation Master Plan in multiple ways, particularly through the attraction, implementation and hosting of over 80 annual sporting events that contribute \$108 million in economic development, annually (pre-pandemic).

4. **Using the chart below, please report your 2020 performance measures that demonstrate: how much you did, how well you did it, and how Calgarians are better off. Please identify through BOLD font, 1-2 measures that are most significant and could be presented in a chart.**

	Performance Measure Name	2018 results	2019 results	2020 results	What story does this measure tell about your work?
How much did you do?	Referrals to industry partners through visitcalgary.com and virtual in-destination counselling services;	N/A	1,460,000	443,518	Tourism Calgary is supporting partners by driving business.



TOURISM CALGARY Civic Partner 2020 Audit Report

How well did you do it?	Stakeholders believe Tourism Calgary is an effective champion for the industry	90%	93%	95%	Tourism Calgary has overwhelming support of its stakeholders and achieved a record number of paid partners (780) in 2020.
How are Calgarians better off?	\$2.5 billion contributed to Calgary's economy from visitor spending	\$2 billion	\$2.5 billion	\$764 million	Additionally, 86% of Calgarians believe tourism is an important contributor to Calgary's economy and quality of life

5. Briefly describe the key impacts of COVID-19 on your operations in 2020.

COVID-19 has had a devastating effect on global tourism, and Tourism Calgary is not exempt from that. As a result of temporary hotel closures, closed borders and drastically reduced travel regionally, nationally and internationally, Tourism Calgary's majority funder, the Calgary Hotel Association has reduced support of the organization and will decrease its funding of Tourism Calgary by 84% in 2021 which will have significant impacts to the future work of the organization.

Tourism Calgary worked diligently to use CEWS funding and advocate for other funding sources to support salaries and programs, thereby avoiding temporary layoffs of staff and being able to maintain support for industry.

With operational and marketing budgets slashed, Tourism Calgary worked with Destinations Canada and Travel Alberta to secure \$1.1 million for a 2020 summer marketing campaign focused on safely encouraging Calgarians to get out and explore local businesses and attractions. This campaign also reached regional markets.

Tourism Calgary's commitment remains that we will continue to support industry partners by safely and appropriately driving business, advocating and supporting partners' innovation efforts as guided by the [COVID-19 Response and Recovery plan](#).

6. Are there any program or service changes made in response to COVID-19 that you plan to integrate into longer term operations? For example, shifting some programming online, or modifications to your delivery model or operations.

As a way of supporting our devastated industry through 2020, in June Tourism Calgary put a temporary freeze on all partnership fees and undertook a review of the partnership program to ensure that our offerings respond to the needs of the industry as partners rebuild from the effects of the pandemic.

In 2020, all visitor services were moved to a digital format, to ensure safe delivery of visitor counselling. This will be ongoing as we can deliver these services in a more efficient and environmentally friendly manner.



TOURISM CALGARY Civic Partner 2020 Audit Report

Finally, in 2020, we worked with the BIAs to deliver #LoveYYC Month. This was a great opportunity to strengthen our relationship with the BIAs and drive business to them. This will continue.

7. Briefly describe any quality improvement changes or operational efficiencies your organization was able to achieve in 2020.

Through a strategic planning process, Tourism Calgary evaluated every aspect of our business to find lasting operational efficiencies, including examining all programs and offerings to ensure they meet the needs of consumers and industry partners during and post-COVID.

This includes working to attract bubble events, offering digital deals for Calgarians to encourage local spending and support of businesses, and supporting our partners in adapting to new health and safety guidelines.

8. Briefly describe some success stories in 2020 that demonstrates how your organization worked in partnership with other community, private or public organizations to achieve shared results for Calgary and Calgarians.

2020 was undoubtedly the most challenging year the tourism industry has faced. Through it all, Tourism Calgary worked extremely hard to adjust and support our partners through the constantly changing environment, safety protocols, restrictions and re-openings, financial challenges and unknowns as exemplified by:

- Working with our partners to actively bid on and attract bubble-format sporting events, resulting in Calgary being selected as the host city for Curling Canada's 2021 event bubble anticipated to generate more than \$13 million in economic impact over a four-month period;
- Advocating alongside TIAC for the effective and immediate roll out of the federal government's Highly Affected Sectors Credit Availability Program as proposed in the 2020 Fall Economic Statement to support our industry in continuing to overcome barriers caused by COVID-19;
- Adapting marketing efforts under the *That's the Spirit* brand platform in response to increased restrictions around in-person experiences. To support industry partners in driving demand for online and contact-free experiences, Tourism Calgary facilitated more than 81,000 digital referrals and inspired more than 545,000 users on visitcalgary.com to support local;
- Collaborating with 14 Business Improvement Areas to activate #LoveYYC Month – an extended virtual celebration that inspired community spirit and drove business for industry partners in November. The social media-based program exceeded expectations with nearly 5,000 online referrals to partners;
- Supporting our partners at Calgary TELUS Convention Centre and the BMO Centre at Stampede Park by collaboratively announcing both venues' achievement in earning the Global Biorisk Advisory Council® STAR™ accreditation. This announcement demonstrated significant collaboration within Calgary's tourism industry and dedication to maintaining the highest-level of cleanliness to support the safe return of meeting and convention business;
- Hosting a four-part series of free Elevating Canadian Experiences workshops alongside TIAC and Travel Alberta to help participating partners identify culinary and shoulder season product and experience development opportunities that could support them in overcoming obstacles created by COVID-19;
- Participating in virtual travel trade marketplaces to continue growing awareness about Calgary's compelling offerings among tour operators in international markets, which elicited pent-up



TOURISM CALGARY Civic Partner 2020 Audit Report

demand for travel to Canada once borders open and vaccinations are wide-spread based on safety factors and the availability of wide open outdoor spaces.

RESOURCES

9. Please estimate how The City's operating funding was allocated in 2020. Mark all areas that apply by approximate percentage. For example, 45% allocated to staffing costs, 10% to evaluation or research, etc.

23%	Advertising and promotion
22%	Programs or services
1%	Office supplies and expenses
6%	Professional and consulting fees
47%	Staff compensation, development and training
0%	Fund development
0%	Purchased supplies and assets
0%	Facility maintenance
1%	Evaluation or Research
0%	Other, please name: Travel to Promote Calgary as Visitor Economy

10. Did volunteers support your operations in 2020? If yes:

How many volunteers?	N/A
Estimated total hours provided by volunteers:	N/A

11. What resources or funding sources did your organization leverage to support operations in 2020?

Leveraged the Canadian Emergency Wage Subsidy (\$1,463,946) to retain staff and maintain programs and services to our partners and key stakeholders.

Leveraged Travel Alberta – Destination Management COVID-19 Relief Program Grant \$1,000,000 to offset operational expenses

Leveraged Destination Canada – Marketing Grant - \$1,100,000 to restart Calgary's visitor economy.

Leveraged investments from the City to secure and organize major events in 2021 – Chinook Blast and the 2021 Curling Canada Scotties Tournament of Hearts, Tim Hortons Brier, Canadian Mixed Doubles Curling Championship, World Men's Curling Championship, Players' Championship and Champions Cup.

12. Did your organization receive any awards or recognition in 2020 that you want to highlight?
N/A

13. CAPITAL AND ASSET MANAGEMENT (for Civic Partners managing City-owned assets)

Asset: N/A



TOURISM CALGARY Civic Partner 2020 Audit Report

Provide a summary of your organization's 2020 capital work, including specific lifecycle/maintenance projects or capital projects.

Capital improvements to Tourism Calgary's online White Hat Academy for \$35K.

New computers \$17K.

a) What funding did your organization leverage to support capital activities in 2020?

Operational revenue from Tourism Calgary's building and CHA funding agreement supported capital activities in 2020.

14. CURRENT STATE: COVID-19 MARCH 2021 UPDATE

The section focuses on the impact of COVID-19 in the month of March 2021, to provide a snapshot of your organization's current state.

Impact

Please choose the one option below that best describes the impact of COVID-19 on your programs or service in March 2021.

<input type="checkbox"/>	Negligible	Minimal to no impact on service. Service is currently operating close to normal.
<input type="checkbox"/>	Minor	Continuing to provide programs and services but some coping strategies required – able to be addressed with existing strategies and resources.
<input type="checkbox"/>	Moderate	Some challenges on ability to achieve objectives. Some delay. Some aspects of the programs or service are only being met in part.
<input type="checkbox"/>	Significant	Difficulties to achieve objectives. Delays or notable aspects of objectives not completed. Falling well-short of normal operations.
<input checked="" type="checkbox"/>	Severe	Unable to meet normal objectives due to serious extended disruption. (e.g. full facility closure, major decrease in users)

Impact Description:

Please briefly describe how your programs and services were impacted in March 2021.

Current Demand for Service:

What is the current demand for your service compared to typical demand?

<input type="checkbox"/>	Demand is steady, largely business as usual.
<input type="checkbox"/>	Demand has increased notably.
<input checked="" type="checkbox"/>	Demand has decreased notably.



TOURISM CALGARY Civic Partner 2020 Audit Report

COVID-19 has had a devastating effect on global tourism, and Tourism Calgary is not exempt from that. As a result of temporary hotel closures, closed borders and drastically reduced travel nationally and internationally, Tourism Calgary's majority funder, the Calgary Hotel Association has reduced support of the organization and will decrease its funding of Tourism Calgary significantly in 2021 which will have significant impacts to the future work of the organization.

Tourism Calgary worked diligently to apply for the CEWS program to support salaries, thereby avoiding temporary layoffs of staff.

Pre-pandemic, tourism in Alberta was an \$8.9 billion industry on a growth trajectory, supporting nearly 73,000 jobs, standing out as an important economic diversifier and community builder for the province.

With international borders closed in March 2020, Calgary's visitor arrivals through YYC Calgary International Airport and land borders have plummeted. In 2020, YYC Calgary International saw only 5.7 million arrivals, and are forecasting only 5.1 million for 2021.

As of Feb. 22, 2021, all travellers returning to, or arriving in, Canada by air or land border crossing must participate in COVID-19 testing and quarantine in a federally-designated hotel for three days at their own expense until negative test results are confirmed. Following this initial isolation in a hotel, the remainder of the traveller's quarantine requirement can be served in their home. These isolation periods are significant deterrents to travel.

As a result, since restrictions were expanded on December 13, 2020, Calgary's downtown hotels have experienced the lowest occupancy rates of any major market in Canada in both January and February. Downtown Calgary was at 6.8% occupancy, almost 50% lower than Edmonton, and significantly lower than Montreal, Toronto and Vancouver.

As of April 28, 2021 only 40% of Tourism Calgary's partners have reopened their doors, and many are at risk of failing due to lost revenue.

As a way of supporting our devastated industry through 2020, in June Tourism Calgary put a temporary freeze on all partnership fees and undertook a review of the partnership program to ensure that our offerings respond to the needs of the industry as partners rebuild from the effects of the pandemic.

To support the industry's recovery and rebuild from COVID-19, Tourism Calgary developed a stakeholder-endorsed phased strategy. As part of the strategy, Tourism Calgary's marketing has shifted and has primarily been focused on Calgarians; helping to develop confidence in local experiences and supporting local businesses.

Through all of this, Tourism Calgary continues to work with industry partners to advocate for their needs. We will recover, and we are optimistic that our strategies for driving sales through leisure, sport and cultural events, and meetings and convention travel will help our industry rebound locally.

Tourism Calgary is also updating *Calgary's Destination Strategy: Ultimate Hosts. Ultimate Host City* to ensure that we are focused on rebuilding the industry and supporting it to thrive for years to come.



TOURISM CALGARY
Civic Partner 2020 Audit Report