

City of Edmonton

Place Branding Research
Comprehensive Report



DATE 2019-12-19

Leger

We know Canadians

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A wide-angle photograph of a city skyline at sunset. The sun is low on the horizon, creating a bright glow and lens flare effects. The sky is filled with wispy, golden clouds. The city buildings are silhouetted against the bright sky, with some reflecting the golden light. In the foreground, there are green trees and a road.

NATIONAL PLACE BRAND RESEARCH RESULTS HIGHLIGHTS

NATIONAL PLACE BRAND RESEARCH RESULTS HIGHLIGHTS

This section provides a high-level overview of the place brand national research results to address the following three objectives:

1. Indicate, in reference to the [2013 Image and Perception Studies done by Longwood International](#) (2013 Longwoods), the changing themes and perceptions of where Edmonton stands, in terms of awareness and image versus other Canadian cities among Edmontonians and those outside of Edmonton.
2. Find out the top attributes that motivate Edmontonians and those outside to move to/live in, visit, study and invest in a city and how Edmonton compares.
3. Understand how the two segments of audiences (Canadians and Canadian businesses) resonate with Edmonton being described as open, inventive, courageous and cooperative, or other descriptors.

QUICK COMMENTARY BY THE CITY OF EDMONTON

Lacking Awareness while Perceptions Improved

While this national place brand research is not a direct comparison to the [2013 Image and Perception Studies](#), awareness of Edmonton is still lacking among Canadian residents and businesses. However, perceptions of Edmonton have improved, hitting those top drivers of a desirable city. More specifically, Edmonton is now perceived as a welcoming place and a “good-sized city for me”. Meanwhile, Canadian businesses (who are familiar with our city) consider Edmonton a place with easy access to customers. Opportunities exist to build on Edmonton’s attractions and make our city more known to our nation and the world.

SUMMARY OF METHODOLOGY

Leger utilized both qualitative and quantitative research methods to gather perceptions and sentiments:

Qualitative Phase:

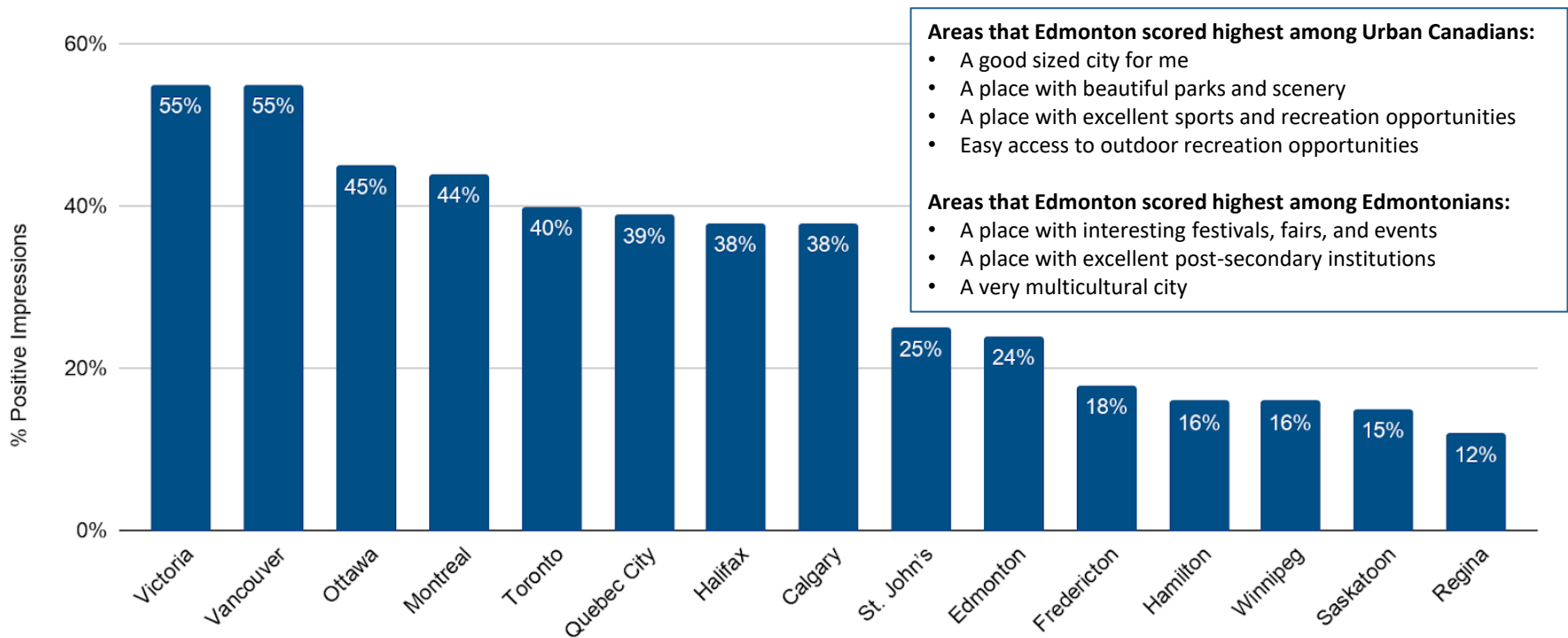
- 11 Interviews with local stakeholders who have an impact on Edmonton’s brand
- 4 Focus groups with 8-10 participants each from entrepreneurs, newcomers and those who have lived in Edmonton for at least 20 years
- Quantitative Phase:
- Online survey with n=3,600+ aged 18+ Urban Canadians in 15 major cities¹
- Online survey with n=150 owners or senior Administration of Canadian businesses (excluding those in Edmonton)

¹Urban Canadians in the 15 major Canadian cities refer to residents in Edmonton, Calgary, St. John’s, Fredericton, Halifax, Montreal, Quebec City, Toronto, Hamilton, Ottawa, Saskatoon, Winnipeg, Regina, Victoria, and Vancouver.

OBJECTIVE 1

Indicate, in reference to the 2013 Image and Perception Studies done by Longwood International (2013 Longwoods) the changing themes and perceptions of where Edmonton stands, in terms of awareness and image versus other Canadian cities among Edmontonians and those outside of Edmonton

In terms of overall impressions, the following chart provides a ranking of 15 Canadian cities according to Urban Canadians:



Note: Due to differences in research methodology, this chart is not a direct comparison with the 2013 Longwoods commissioned by the City of Edmonton. Instead, it provides a snapshot of where Edmonton stands among other cities.

OBJECTIVE 2

Find out the top attributes that motivate Edmontonians and those outside to move to/live in, visit, study and invest in a city and how Edmonton compares.

The City and Leger did not conduct the research to understand what motivates Edmontonians and Canadians to move to/stay in, visit, study and invest in any city. Instead, we used the overall top drivers from the 2013 Longwoods, assuming that the drivers would remain similar.

URBAN CANADIANS

2013 Longwoods

Overall Perceptions of Edmonton* (Top 5 mentions)	TOP DRIVERS OF ANY CITY	
	To live	To visit
Excellent job opportunities	The right size city for me	A unique and interesting place
Booming economy	An exciting/ vibrant place	An exciting/vibrant place
Popular with vacationers	Place with a great future	Popular with vacationers
Interesting neighbourhoods	A great place for young single	Interesting neighbourhoods
Lots to see and do	Would personally feel welcome	Lots to see and do

2019 Leger

Overall Perceptions of Edmonton*	What Urban Canadians, excluding Edmontonians, think of Edmonton		
	To live/move to	To visit	To study
A good-sized city for me	A place I would feel welcome	A place I would feel welcome	A place I would feel welcome
A place with beautiful parks, scenery	A unique and interesting place	A good-sized city for me	A good-sized city for me
A place with excellent sports/recreational opportunities; easy access to outdoor recreation opportunities	A place that is affordable to live in	A unique and interesting place	A unique and interesting place
A place with high quality/ accessible health care; a place I would feel welcome; a place with lots of city pride; a place with a good variety of restaurants	An exciting and vibrant place	A place with a good variety of restaurants	An exciting and vibrant place
A place with excellent post-secondary institutions; a great place to explore; a clean city; a place with a high quality of life; a place with warm and friendly people	A place with exciting nightlife/ entertainment	A great place to explore	

**Due to question wording and scale changes in 2019, caution should be used when comparing overall results.*

OBJECTIVE 2 - HIGHLIGHTS

- 24% of Urban Canadians cite having a positive impression (8-10 ratings) of Edmonton.
- 56% of Urban Canadians (excluding Edmontonians) feel that they would really enjoy visiting Edmonton, and 27% feel that they would really enjoy living in Edmonton. 9% indicate they would be likely to move to, or study or go to school in Edmonton.
- Survey respondents most strongly feel that Edmonton is a good sized city for them, has beautiful parks and scenery, and has excellent sports/recreational opportunities.
 - Having new/different places to visit, shop (e.g., West Edmonton Mall) and dine are the top mentions of those who enjoy visiting Edmonton.
- Urban Canadians least associate Edmonton with being a place that has excellent museums/art galleries, a vibrant art community, and having exciting nightlife/entertainment -- it's worth noting that up to 42% of Urban Canadians do not know if these offerings exist in Edmonton.
- Not knowing enough about Edmonton is the top mention among Urban Canadians (excluding Edmontonians) who neither agree nor disagree they would enjoy living in or visiting Edmonton. Too cold and/or long winters, being boring and/or not much to do, and being not interested are other top mentions
- Recall of advertising and familiarity
 - Only 9% of Urban Canadians recall any advertising for Edmonton, while 10% recall learning about Edmonton in the news (with the greatest proportion indicating the majority of what they recall as favorable).
 - 26% of Urban Canadians say they are familiar with Edmonton.

CANADIAN BUSINESSES

Leger surveyed 151 owners or senior administrator of Canadian businesses (excluding Edmonton) and drew the following perceptions:

Impression statements	Criteria for locating or expanding business in any city	Overall, Edmonton is	Those unfamiliar with Edmonton	Those familiar with Edmonton	Consider opening a business in Edmonton because	Consider expanding a business in Edmonton because	Would recommend Edmonton as a place for business because
A place with an excellent reputation							✓
A place with a strong economy		✓		✓			
A place with high quality of life				✓			
A place that is affordable to live in			✓				
A place where my business could be successful		✓		✓			✓
A place easy to make ideas/ business happen					✓	✓	
A place with a friendly business environment	✓						
A place with easy access to customers	✓					✓	
A place with low taxes				✓			
A place with a sufficiently large, diverse workforce			✓				
A great location logistically						✓	

CANADIAN BUSINESSES – HIGHLIGHTS

- 21% of Canadian business respondents indicate having positive impressions (8-10 ratings) of Edmonton, while Toronto garners the greatest proportion of positive impression ratings.
- 50% of Canadian business respondents indicate being familiar with Edmonton, while 33% are not.
- Canadian business respondents cite that
 - access to business professionals, followed by a place that is affordable to live in, are the statements that most apply to Edmonton.
 - diversity of the city and having good business potential as the main reasons for their intention to somewhat or very likely open a business in Edmonton.
 - cold weather and being too far/too far north are the drawbacks for operating a business in Edmonton.

Aside from businesses outside of Edmonton, Leger also interviewed those in Edmonton. Entrepreneurs/local businesses had trouble pointing to the ‘secret sauce’ that made Edmonton a place for entrepreneurs. They did, however, have a clear understanding that there is a deep seeded risk tolerance here and that there is a lot of support for new businesses. They did not seem to feel that the City got in their way of success. Below are highlights of the sentiments:

Things that make Edmonton a good place to open a business:

- Very easy
- Rewards hard workers
- Less cliquy
- Eager to give new businesses a chance
- Welcoming to non-traditional revenue streams

Strengths of Edmonton:

- Perseverance
- River valley
- Festivals- second largest Fringe Festival in North America
- Loyalty
- Food scene - lots of restaurants, lots of ethnic restaurants
- Diversity
- Diverse arts community
- Standard of living
- Working class city- want to work
- People are open-minded
- Everyone accepted

Limitations of Edmonton:

- Preconceived notions
- Too much urban sprawl
- City is a pushover for businesses wanting to leave

OBJECTIVE 3


Understand how the two segments of audiences (Canadians and Canadian businesses) resonate with Edmonton being described as open, inventive, courageous and cooperative, or other descriptors or drivers.

The core brand characteristics of Edmonton from the Make Something Edmonton brand work are open, inventive, cooperative and courageous. The following illustrates how Urban Canadians feel about applying each statement to Edmonton:

- 52% of Urban Canadians feel the statements about being open apply to Edmonton.
- 42% of Urban Canadians feel the statements about being inventive apply to Edmonton.
- 35% of Urban Canadians feel the statements about being cooperative apply to Edmonton.
- 34% of Urban Canadians feel the statements about being courageous apply to Edmonton.

Canadian businesses feel most strongly toward following statements about Edmonton:

- Access to business professionals (48%)
- A place that is affordable to live in (44%)
- A place with a sufficiently large workforce (38%)
- A place that is easy to get around (35%)

A wide-angle photograph of a city skyline at sunset. The sun is low on the horizon to the left, creating a bright glow and lens flare effects. The sky is filled with wispy, golden clouds. The city buildings are silhouetted against the bright sky, with some windows reflecting the light. In the foreground, there is a body of water reflecting the sky and buildings, and some greenery on the right side.

DETAILED LONGWOODS STUDY COMPARISONS

LONGWOODS STUDY COMPARISONS

The following pages compare the results from the 2013 Longwoods study with the 2019 place brand report. Due to changes in question wording, scale options, and a difference in research methodology, caution should be used when interpreting, and comparing results.

2013 Longwoods Study	2019 Place Brand Report
Know a lot about Edmonton	Familiar with Edmonton
25%	26%
Would really enjoy living in Edmonton	Would really enjoy living in Edmonton
39%	27%
Would really enjoy visiting Edmonton	Would really enjoy visiting Edmonton
60%	56%
Aided awareness of news articles for Edmonton	Recall reading or hearing about Edmonton in the news recently
14%	10%
Aided awareness of general advertising for Edmonton	Recall seeing, reading, or hearing advertising about Edmonton recently
14%	9%

LONGWOODS STUDY COMPARISONS

2013 Longwoods Study (agree)	2019 Place Brand Report (applies)
The right sized city for me 35%	A good-sized city for me 44%
Truly beautiful scenery/setting 41%	A place with beautiful parks and scenery 43%
Beautiful parks and gardens 43%	A place with beautiful parks and scenery 43%
Great for outdoor sports/activities 46%	Easy access to outdoor recreation opportunities 42%
Excellent sports/recreational facilities 50%	A place with excellent sports/recreational opportunities 42%
Lots of good restaurants 44%	A place with a good variety of restaurants 39%
Would personally feel welcome 44%	A place I would feel welcome 39%
High quality/accessible health care 46%	A place with high quality/accessible health care 39%
Strong civic pride/community 43%	A place with lots of civic pride 39%
A great place to raise a family 43%	A great place to raise a family 38%
Noted for cleanliness 37%	A clean city 38%
Great place for walking/exploring 40%	A great place to explore 38%
Warm, friendly people 44%	A place with warm and friendly people 38%

2013 Longwoods Study (agree)	2019 Place Brand Report (applies)
Excellent universities/colleges 46%	A place with excellent post-secondary institutions 38%
A very multicultural city 40%	A very multicultural city 36%
A safe place 43%	A safe place 36%
Interesting festivals/fairs/events 40%	A place with interesting festivals/fairs/events 35%
Low cost of living 25%	A place that is affordable to live in 35%
A unique, interesting place 37%	A unique and interesting place 34%
Diversified economy 44%	A place with a diverse economy 32%
Excellent job opportunities 53%	A place with excellent job opportunities 32%
Easy to get around the city 41%	A place that is easy to get around 32%
An exciting/vibrant place 38%	An exciting and vibrant place 30%
Excellent museums/art galleries 35%	A place with excellent museums/art galleries 29%
Vibrant arts community 33%	A place with a vibrant arts community 28%
Exciting nightlife/entertainment 34%	A place with exciting nightlife/entertainment 27%



KEY FINDINGS

Urban Canadians

2019 Edmonton Place Brand Overall Scorecard



26% of Urban Canadians
say they are familiar with
Edmonton.



Edmonton is ranked 10th by positive impression
among Urban Canadians, with **24%** of Urban
Canadians having a positive impression about
the city.

2019 Edmonton Place Brand Overall Scorecard



56% of Urban Canadians (excluding Edmontonians) agree they would really enjoy visiting Edmonton, while **49%** of Urban Canadians (excluding Edmontonians) claim they are likely to visit Edmonton.



9% of Urban Canadians (excluding Edmontonians) say they are likely to move to Edmonton to study or go to school.



27% of Urban Canadians (excluding Edmontonians) agree they would really enjoy living in Edmonton, and **9%** of Urban Canadians (excluding Edmontonians) say they are likely to move to Edmonton to live.



7% of Urban Canadians (excluding Edmontonians) claim they are likely to open a business in Edmonton.

2019 Edmonton Place Brand Overall Scorecard

Among Urban Canadians the key drivers of perceptions of Edmonton

...for the basic qualities of the place are:

1. A place I would feel welcome
2. A place with a high quality of life

... for the place's lifestyle are:

1. A unique and interesting place
2. An exciting and vibrant place

Among Urban Canadians familiar with Edmonton* the key drivers of perceptions of Edmonton

...for the basic qualities of the place are:

1. A place with a high quality of life
2. A place I would feel welcome

... for the place's lifestyle are:

1. A unique and interesting place
2. A place with interesting festivals, fairs, and events

Among Urban Canadians not familiar with Edmonton** the key drivers of perceptions of Edmonton

...for the basic qualities of the place are:

1. A place I would feel welcome
2. A place with a high quality of life

... for the place's lifestyle are:

1. An exciting and vibrant place
2. A great place to explore

2019 Edmonton Place Brand Overall Scorecard

Perceptions of Edmonton According to Urban Canadians...

The top three statements that apply to Edmonton:



A good sized city



A place with beautiful parks and scenery



A place with excellent sports and recreation opportunities

The three statements that least apply to Edmonton:



A place with excellent museums and art galleries



A place with a vibrant arts community



A place with exciting nightlife and entertainment

Perceptions of Edmonton According to Edmontonians*...

The top three statements that apply to Edmonton:



A place with interesting festivals, fairs, and events



A place with excellent post-secondary institutions



A very multicultural city

The four statements that least apply to Edmonton:



A clean city



An exciting and vibrant place



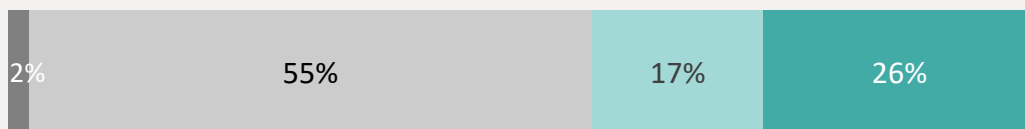
A place with exciting nightlife and entertainment



A unique and interesting place

Urban Canadians Familiarity with Edmonton

26% of Urban Canadians excluding Edmontonians indicate they are familiar with Edmonton.



■ Don't know/prefer not to answer

■ Neither familiar nor unfamiliar

■ Unfamiliar (not very, not at all)

■ Familiar (somewhat, very)



Familiarity with Edmonton is higher among...

- Males
- Calgarians
- Those who recall advertising for Edmonton
- Those who recall news about Edmonton
- Those who have visited Edmonton
- Those who have lived in Edmonton
- Those with a college or university education

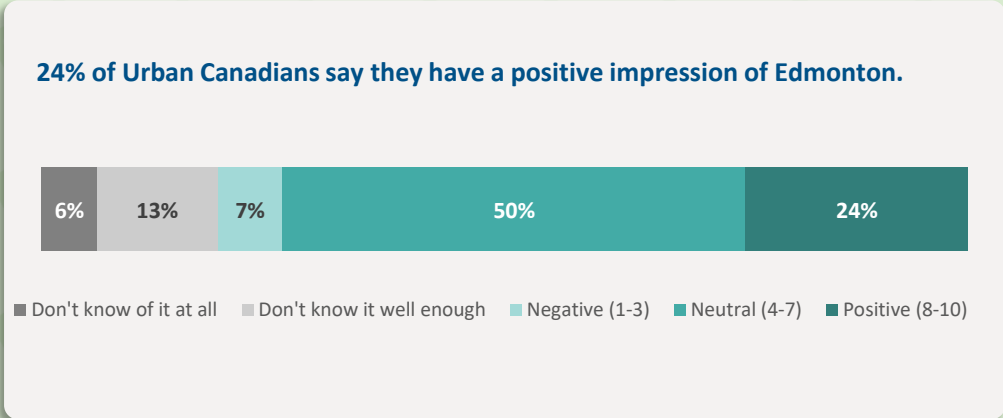
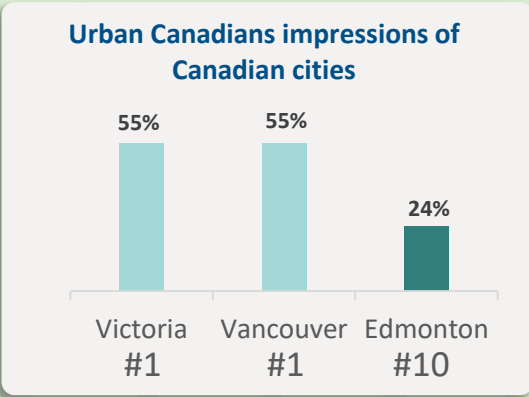


Unfamiliarity with Edmonton is higher among...

- Females
- Those who do not recall news about Edmonton
- Those who have not visited Edmonton
- Those who have not lived in Edmonton
- Those who have a high school education or less
- Those without children in their household

Urban Canadians Overall Impression with Canadian Cities

Urban Canadians have the most positive impressions of Victoria and Vancouver, with Edmonton ranking 10th.



Urban Canadians (by city) rating Edmonton by positive impression (8-10 responses)

	n=	Edmonton
Edmonton	501	60%
Regina	203	43%
Saskatoon	207	42%
Winnipeg	200	34%
St. John's	200	33%
Fredericton	202	27%
Hamilton	200	25%
Quebec City	200	23%
Ottawa	202	23%
Calgary	500	21%
Vancouver	200	20%
Victoria	200	18%
Halifax	202	18%
Toronto	200	17%
Montreal	202	13%

Aside from Edmontonians themselves, Regina and Saskatoon have the highest positive impression of Edmonton.

Edmontonians rating each city by positive impression (8-10 responses)

	Edmonton (n=501)
Victoria	62%
Edmonton	60%
Vancouver	50%
Calgary	42%
Ottawa	32%
Halifax	30%
Montreal	29%
Toronto	26%
Quebec City	25%
St. John's	22%
Saskatoon	20%
Fredericton	16%
Regina	13%
Winnipeg	11%
Hamilton	11%

Edmontonians have the highest positive impression of Victoria, closely followed by Edmonton. Half of Edmontonians have a positive impression of Vancouver.

Urban Canadian cities positive impression (8-10 rating) of their own city

	n=	Canadian cities positive impressions of their own city
Quebec City	200	93%
Victoria	200	88%
Halifax	202	87%
Vancouver	200	80%
St. John's	200	77%
Ottawa	202	72%
Fredericton	202	72%
Montreal	202	71%
Toronto	200	70%
Calgary	500	69%
Saskatoon	207	62%
Edmonton	501	60%
Winnipeg	200	57%
Hamilton	200	52%
Regina	203	50%

Quebec City, Victoria, and Halifax residents have the highest positive impression of their own city. 60% of Edmontonians have a positive impression of Edmonton.

Urban Canadians including Edmontonians' positive impressions of Canadian cities

Urban Canadians (n=3,619)	
Victoria	55%
Vancouver	55%
Ottawa	45%
Montreal	44%
Toronto	40%
Quebec City	39%
Halifax	38%
Calgary	38%
St. John's	25%
Edmonton	24%
Fredericton	18%
Hamilton	16%
Winnipeg	16%
Saskatoon	15%
Regina	12%

Edmonton ranks 10th by positive impression among Urban Canadians (including Edmonton)

Urban Canadians excluding Edmontonians' positive impressions of Canadian cities

Urban Canadians excluding Edmontonians* (n=3,118)	
Vancouver	55%
Victoria	54%
Ottawa	46%
Montreal	45%
Toronto	41%
Quebec City	40%
Halifax	39%
Calgary	38%
St. John's	26%
Edmonton	21%
Fredericton	18%
Hamilton	17%
Winnipeg	16%
Saskatoon	15%
Regina	12%

Edmonton ranks 10th by positive impression among Urban Canadians (excluding Edmonton)

Perceptions of Edmonton

56%

of Urban Canadians

Feel they would really enjoy visiting Edmonton



Those familiar with Edmonton (excluding Edmontonians) are more likely to feel they would really enjoy visiting and/or living in Edmonton.

27%

of Urban Canadians

Feel they would really enjoy living in Edmonton



7%

of Urban Canadians

Say they would open a business in Edmonton



Those familiar with Edmonton (excluding Edmontonians) and Edmontonians themselves are more likely to open a business in Edmonton.

Perceptions of Edmonton continued

49%

of Urban Canadians

Would be likely to visit Edmonton



9%

of Urban Canadians

Would be likely to move to
Edmonton to live



9%

of Urban Canadians

Would be likely to move to
Edmonton to study or go to
school



Those familiar with Edmonton (excluding Edmontonians) are more likely to visit Edmonton, move to Edmonton to live, and/or move to Edmonton to study or go to school.

Basic Quality Drivers: Which basic qualities drivers apply to Edmonton (safety, peaceful, cleanliness, etc.)

Key Drivers

...according to Urban Canadians
(n=3104)

...according to Urban Canadians
familiar with Edmonton (n=1537)

...according to Urban Canadians
not familiar with Edmonton
(n=1567)

A place I would feel welcome 18%

17%

20%

A place with a high quality of life 15%

15%

14%

A great place to raise a family 14%

14%

13%

A good-sized city for me 13%

12%

13%

A place with a strong sense of community
and cooperation 9%

9%

8%

A place with warm and friendly people 9%

11%

8%

A clean city 7%

8%

7%

A safe place 7%

6%

9%

A place that is easy to get around 6%

5%

6%

A place that is affordable to live in 3%

4%

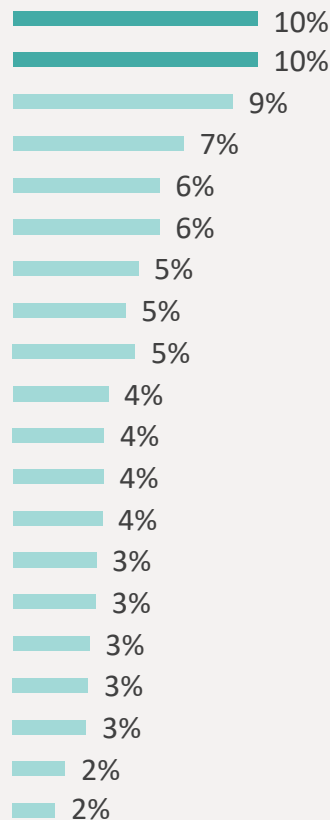
3%

Lifestyle Drivers: Which lifestyle drivers apply to Edmonton (multicultural, restaurant, etc.)

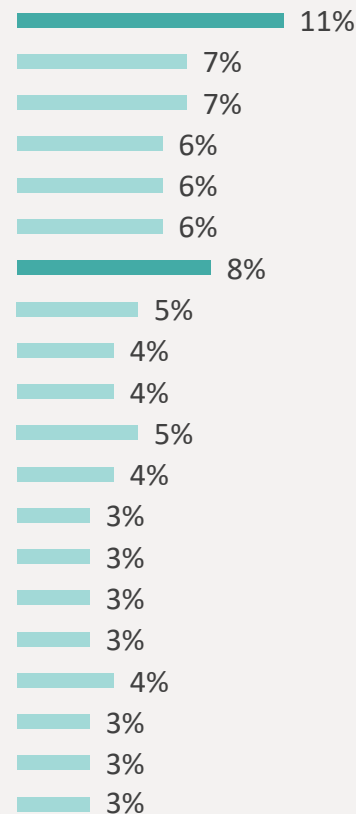
Key Drivers

- A unique and interesting place
- An exciting and vibrant place
- A great place to explore
- A place with beautiful parks and scenery
- A place that is open to new people and new ideas
- A place that is focused on innovation and the future
- A place with interesting festivals/fairs/events
- A place with a diverse economy
- A place with a vibrant arts community
- A very multicultural city
- A place with excellent post-secondary institutions
- A place with excellent museums/art galleries
- A place with lots of year-round activities
- A place with excellent job opportunities
- A place a good variety of restaurants
- A place with exciting nightlife/entertainment
- A place with lots of city pride
- A place with excellent sports/recreational opportunities
- Easy access to outdoor recreation opportunities
- A place with high quality/accessible health care

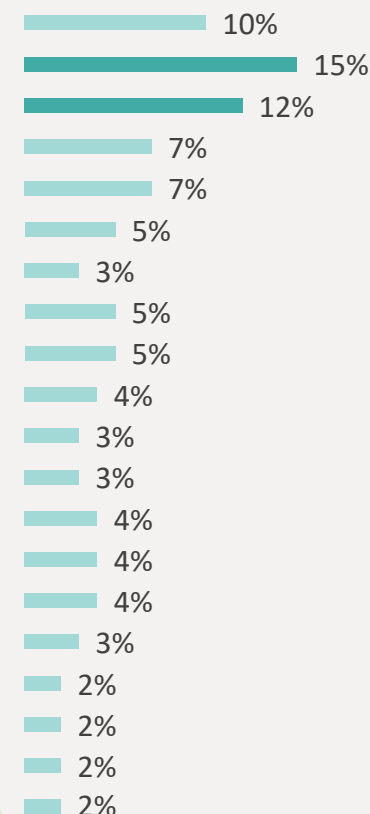
...according to Urban Canadians (n=3104)



...according to Urban Canadians familiar with Edmonton (n=1537)



...according to Urban Canadians not familiar with Edmonton (n=1567)





KEY FINDINGS

CANADIAN BUSINESS RESPONDENTS

2019 Edmonton Place Brand Business Scorecard



50% of Canadian business respondents indicate they are familiar with Edmonton.



23% of Canadian business respondents cite they are likely to recommend Edmonton as a place to open or operate a business.



17% of Canadian business respondents cite they are likely to consider Edmonton as a location to expand or move their business.



Edmonton is ranked **6th** by positive impression among Canadian business respondents, with **21%** of Canadian business respondents having a positive impression about the city.



14% of Canadian business respondents cite they are likely to open a business in Edmonton.

2019 Edmonton Place Brand Business Scorecard



24% of Canadian business respondents are likely to expand their operations in Canada within the next five years, including 9% extremely likely.



When asked which Canadian cities they would most consider expanding into, 10% of Canadian business respondents cite they would consider expanding their operations into Edmonton.



Among Canadian business respondents, the most important characteristics when considering location are:

- Easy access to customers
- General 'business friendly' environment
- Access to reliable road and transportation network

2019 Edmonton Place Brand Business Scorecard

The key drivers of the overall impression of Edmonton

...among Canadian business respondents*:

- A place where my business could be successful
- A place with a strong economy

...among Canadian business respondents familiar with Edmonton**:

- A place where my business could be successful
- A place with a strong economy
- A place with a high quality of life

...among Canadian business respondents unfamiliar with Edmonton***:

- A place with a sufficiently large workforce
- A place that is affordable to live in

Among Canadian business respondents likely to open a business⁺, the most relevant factors that influence this are:

- A great location logistically
- A place where it is easy to make ideas and businesses happen
- A place with great Municipal government vision and direction

Among Canadian business respondents likely to expand their business⁺⁺, the most relevant factors that influence this are:

- A great location logistically
- Access to a good customer base
- A place where it is easy to make ideas and businesses happen

Among Canadian business respondents likely to recommend Edmonton⁺⁺⁺, the most relevant factors that influence this are:

- A place where my business could be successful
- A place with an excellent reputation



Areas that Edmonton scored highest among Canadian business respondents:

- Access to business professionals (e.g. lawyers, accountants, etc.)
- A place that is affordable to live in
- A place with a sufficiently large workforce

Base: Canadian business respondents (n=151)

*Base: Canadian business respondents who provided and overall impression rating of Edmonton (n=115)

**Base: Canadian business respondents familiar with Edmonton who provided and overall impression rating of Edmonton (n=73)

***Base: Canadian business respondents unfamiliar with Edmonton who provided and overall impression rating of Edmonton (n=42)

+Base: Canadian business respondents likely to open a business who provided and overall impression rating of Edmonton (n=132)

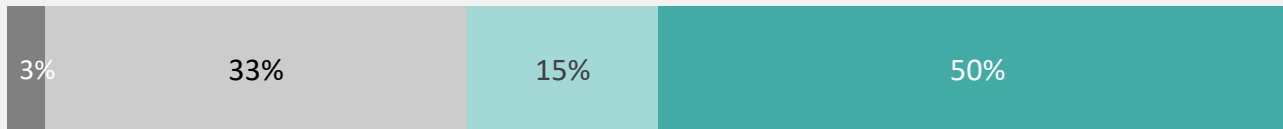
++ Base: Canadian business respondents likely to expand their business who provided and overall impression rating of Edmonton (n=138)

+++ Base: Canadian business respondents likely to recommend their business who provided and overall impression rating of Edmonton (n=132)

Canadian Business Respondents Familiarity with Edmonton



50% of Canadian business respondents indicate they are familiar with Edmonton.

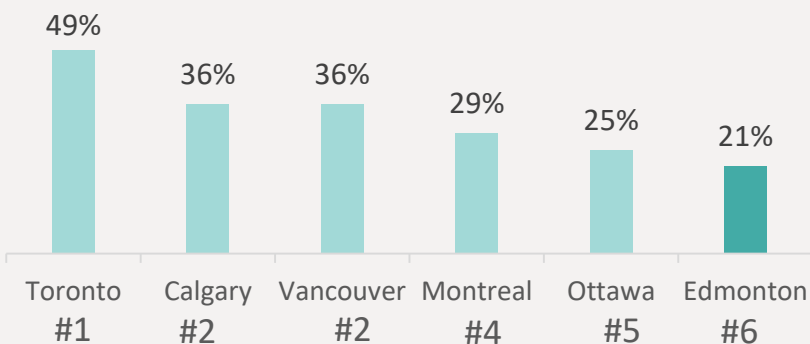


■ Don't know/prefer not to answer ■ Unfamiliar (not very, not at all) ■ Neither familiar not unfamiliar ■ Familiar (somewhat, very)

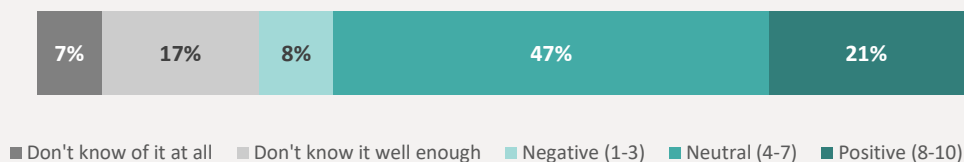
Canadian Business Respondents Overall Impression of Canadian Cities

Canadian business owners have the most positive impressions of Toronto followed by Calgary and Vancouver, with Edmonton ranking 6th.

Canadians business respondents impressions of Canadian cities

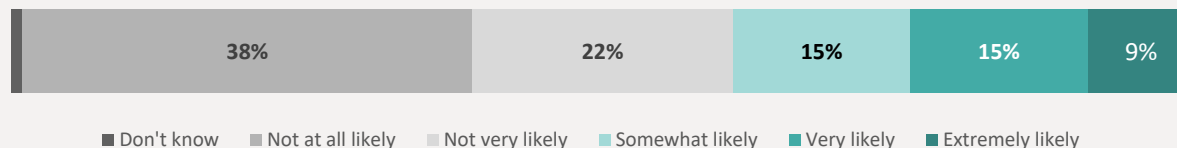


21% of Canadian business respondents say they have a positive impression of Edmonton.

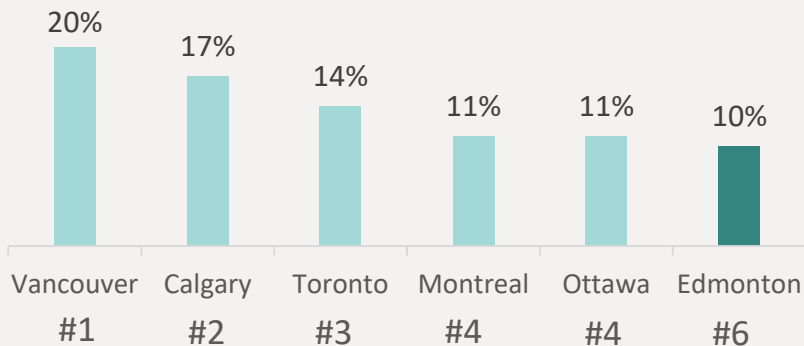


Canadians Business Respondents Expansion Criteria

24% of Canadian business respondents say they would be either very or extremely likely to expand their business operations in Canada within the next five years



Canadian business respondents most considered cities to expand into



Canadian business respondents feel that easy access to customers is the most critical aspect driving their decision about where to locate or expand their business operations, followed by a general 'business friendly' environment, and access to reliable road and transportation network.

Canadian Business Respondents Perceptions of Edmonton

23%

of Canadian business respondents

Recommend Edmonton as a place to open or operate a business



17%

of Canadian business respondents

Cite they would consider Edmonton as a location to expand or move their business



14%

of Canadian business respondents

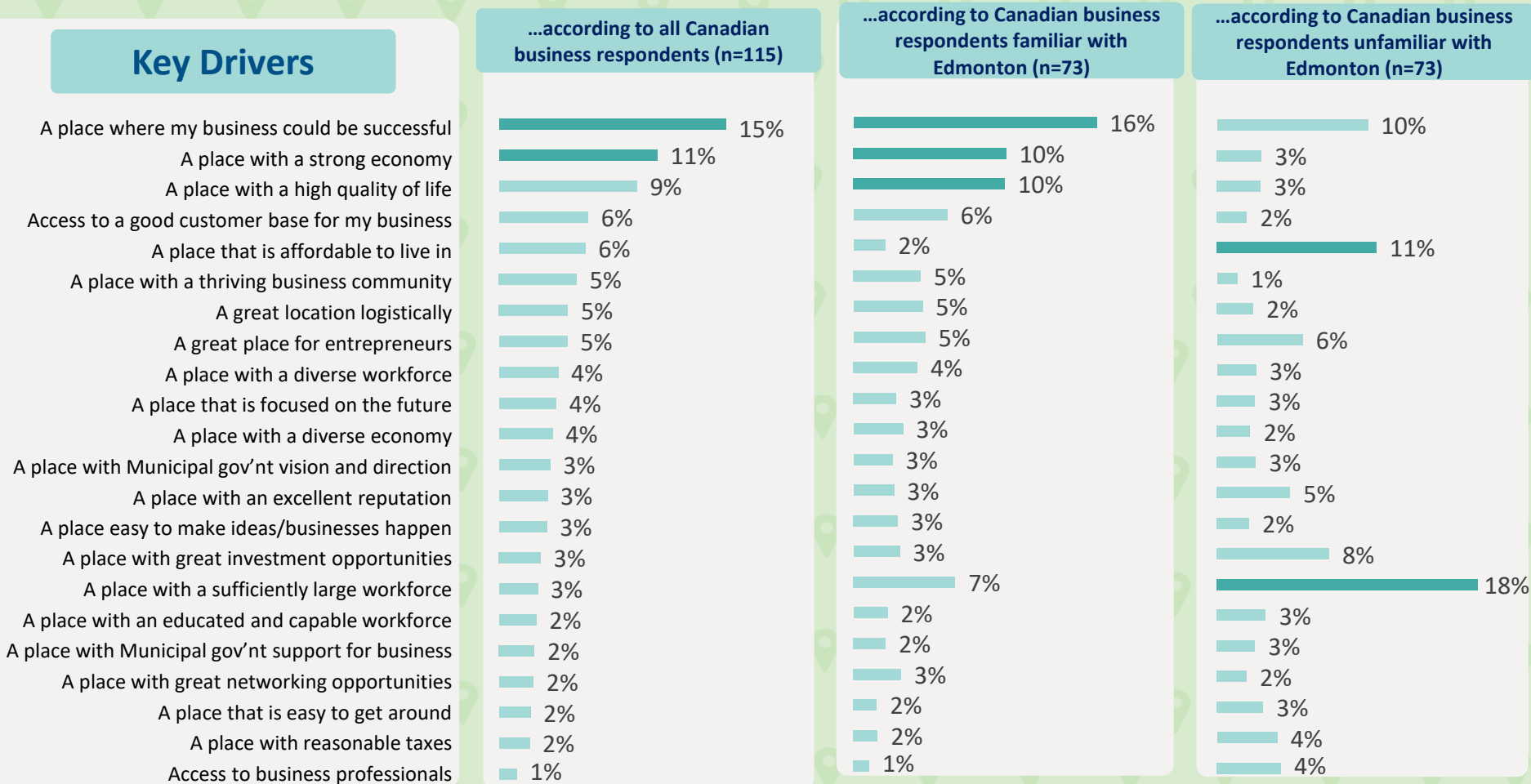
Cite they are likely to open a business in Edmonton



Those familiar with Edmonton are more likely to recommend Edmonton as a place to open or operate a business, consider Edmonton as a location to expand or move their business, and open a business in Edmonton.

Overall Impression Drivers: What drivers influence overall impression of Edmonton from business viewpoint

Key Drivers



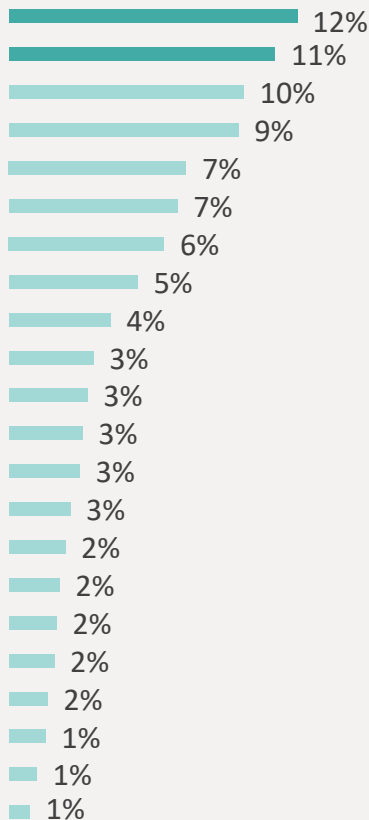
*Base: Canadians business respondents who provided an overall impression rating of Edmonton

Business Growth Drivers: What drivers influence likelihood to open a business, expand a business, or recommend Edmonton from business viewpoint

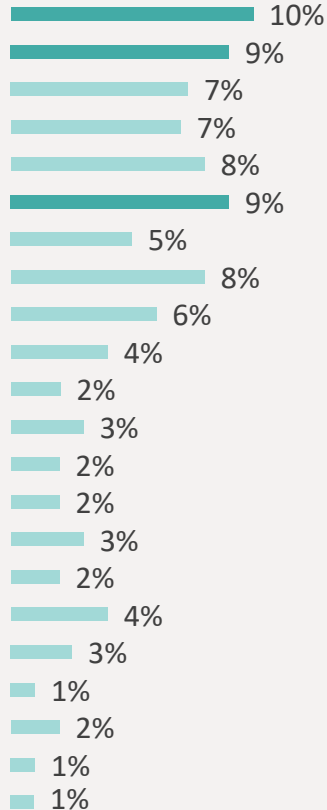
Key Drivers

- A great location logistically
- A place easy to make ideas/businesses happen
- A place with Municipal gov't vision and direction
- A place with a high quality of life
- A place with an excellent reputation
- Access to a good customer base for my business
- A place with a strong economy
- A place where my business could be successful
- A place with great investment opportunities
- A great place for entrepreneurs
- A place with reasonable taxes
- A place with Municipal gov't support for business
- A place with a diverse workforce
- A place with a thriving business community
- A place that is focused on the future
- A place with a diverse economy
- A place with great networking opportunities
- A place that is easy to get around
- A place that is affordable to live in
- A place with an educated and capable workforce
- Access to business professionals
- A place with a sufficiently large workforce

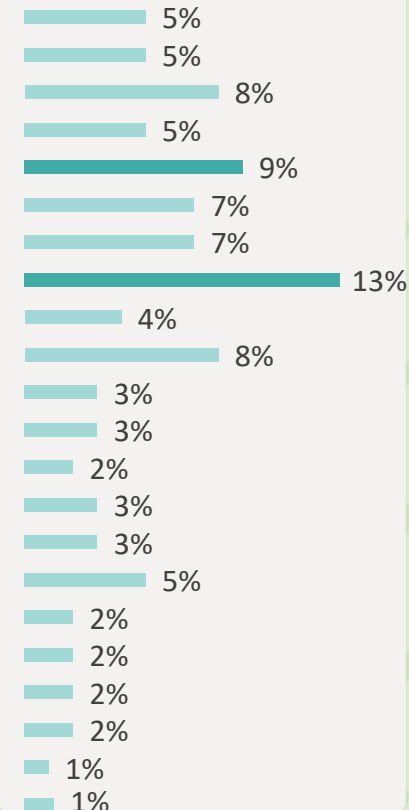
...according to Canadian business respondents likely to open a business in Edmonton (n=132)



...according to Canadian business respondents likely to expand a business into Edmonton (n=138)



...according to Canadian business respondents likely to recommend Edmonton (n=132)



According to Canadian Business Respondents

The top three statements that apply to Edmonton:



Access to
business
professionals



A place that
is affordable
to live in



A place with
a sufficiently
large
workforce

The three statements that least apply to Edmonton:



A place with great
Municipal
government
support for
business



A great location
logistically



A place with
great Municipal
government
vision



APPENDIX A

DETAILED METHODOLOGY

METHODOLOGY

FOCUS GROUPS

Four focus groups were conducted by Leger at their Edmonton office, in their professional qualitative facility.

Two groups were conducted with 'Newcomers' on June 26th (8pm-10pm: 7 participants in total) and June 27th (6pm-8pm: 6 participants). In order to qualify as a participant for these groups participants had to meet the following criteria:

- Aged 18+
- Must currently be a resident of Edmonton
- Arrived from somewhere else in Canada in the past 5 years
- Excluded those working in market research, advertising, PR, media, journalism
- Excluded those who have attended a focus group in the last 12 months, or more than 3 focus groups ever

One group was conducted with 'Lifers' on June 26th (6pm-8pm: 5 participants). In order to qualify as a participant for this group, participants had to meet the following criteria:

- Aged 18+
- Must currently be a resident of Edmonton
- Lived in Edmonton for at least 20 years
- Exclude those working in market research, advertising, PR, media, journalism
- Exclude those who have attended a focus group in the last 12 months, or more than 3 focus groups ever

One group was conducted with 'Entrepreneurs' on June 27th (12pm-2pm: 8 participants). In order to qualify as a participant for this group, participants had to meet the following criteria:

- Aged 18+
- Own (either totally or in partnership) a small business that operates in Edmonton
- First opened that business within the past 7 years

Groups were all approximately 1 hour and 45 minutes in length, and the discussions revolved around the reasons for moving/living/staying/having business in Edmonton, sense of Edmonton pride, perceived strengths and weaknesses of Edmonton in regards to branding, and the role of the City and stakeholders in overcoming the place brand challenges.

METHODOLOGY

IN-DEPTH INTERVIEWS

A total of 11 in-depth interviews were conducted with various executive stakeholders in Edmonton, between June 14th and July 10th, 2019.

The stakeholder contact list was prepared by the City of Edmonton and Leger, and the City of Edmonton made initial contact with all participants to formally invite them to participate. Interviews were then scheduled by Leger, and conducted by senior Leger staff experienced in one-on-one interviewing.

Interviews lasted 45 minutes on average, and the discussions revolved around internal (Edmontonians) and external (non-Edmontonians) perceptions of Edmonton, attracting talent and investment, and the perceived role the City should play in the current place brand challenge.

METHODOLOGY

ONLINE SURVEY

Data Collection

Urban Canadians (General Public)

- Leger conducted n=3,619 interviews with Canadian residents aged 18 years or older, from the following targeted cities:
 - Edmonton (n=501)
 - Calgary (n=500)
 - St. John's (n=200)
 - Fredericton (n=202)
 - Halifax (n=202)
 - Montreal (n=202)
 - Quebec City (n=200)
 - Toronto (n=200)
 - Hamilton (n=200)
 - Ottawa (n=202)
 - Saskatoon (n=207)
 - Winnipeg (n=200)
 - Regina (n=203)
 - Victoria (n=200)
 - Vancouver (n=200)
- Interviews were conducted using Leger's online panel, Legerweb.com.
- Interviews were conducted between August 12th and August 31st, 2019.

METHODOLOGY

ONLINE SURVEY

Data Collection (continued)

Canadian Business Respondents

- Leger conducted n=151 interviews with Canadian business respondents who are employed full or part time, work for a for profit company, are involved in the decision making process of expanding business operations, held an executive job title/role (CEO, Executive Director, President, Owner, Executive, Executive VP, Senior VP, VP, Senior Manager, Director, Senior Management/Executive (not at board level), and/or C-Level Management), and lived in a Canadian city excluding Edmonton.
- Interviews were conducted using Leger's online panel, Legerweb.com.
- Interviews were conducted between August 14th and August 27th, 2019.

Analysis

- Urban Canadian (general public) data are weighted by age, gender, and city size.
- Canadian business respondent data is unweighted.
- A key driver analysis was conducted to determine importance of various attributes, this is further explained in the next section.

Statistical Reliability

As a non-random internet survey of Urban Canadians, a margin of error is not reported (margin of error accounts for sampling error). Had these data been collected using a probability sample, the margin of error for a sample size of 3,619 would have been ± 1.6 percentage points, 19 times out of 20.

As a non-random internet survey of Canadian business respondents, a margin of error is not reported (margin of error accounts for sampling error). Had these data been collected using a probability sample, the margin of error for a sample size of 151 would have been ± 8.0 percentage points, 19 times out of 20.

METHODOLOGY

KEY DRIVERS ANALYSIS

In the context of this study, a key driver analysis has been performed to provide the City of Edmonton insight in regards to their place branding. Leger identified which attributes are most influential in regards to overall impressions, based on the respondent's familiarity with the city.

Definition

Key driver analysis, also known as importance analysis, is an ensemble of techniques aiming at identifying and quantifying the impact of influential factors (i.e. drivers) on overall assessment (i.e. satisfaction, experience,...) through causal relationships.

Derived vs Stated Importance

Multivariate and Shapley-Value regression are popular techniques based on statistical analysis to infer importance. Unlike stated importance, where respondents are asked to rate the level of importance, and thus subject to individual bias, derived importance is known to produce more robust results. Not only are the most important attributes better discriminated, but the extent to which one attribute is driving more than others is also quantified.

Shapley-Value Regression

Leger has used the Shapley-Value regression approach to determine the relative importance of key drivers to respondents overall impression of Edmonton. It has the advantage to take into account (i) the causal relationship between variables and (ii) the problems associated with multicollinearity. Multicollinearity arises when variables are highly correlated among them. This means that the same underlying information is captured several times by different variables, which inflate the importance of the underlying dimension if the issue is not treated. The drivers identified with Shapley-Value regression are thus based on a robust and reliable model.

METHODOLOGY

KEY DRIVERS ANALYSIS

Towards Actionable Metrics

Key performance indicators (KPI) can be derived from driver analysis and used to communicate collaborative efforts towards a same goal. Unlike vanity metrics, those derived KPIs are strategically aligned and have the power to move the needle in regards to development strategies. Insights on where to put efforts to most effectively maximize effects are then identified.

Dependant variable: Overall impression (based on what you may have read, heard or know).

ANALYSIS BASED ON URBAN CANADIANS, INCLUDING EDMONTON

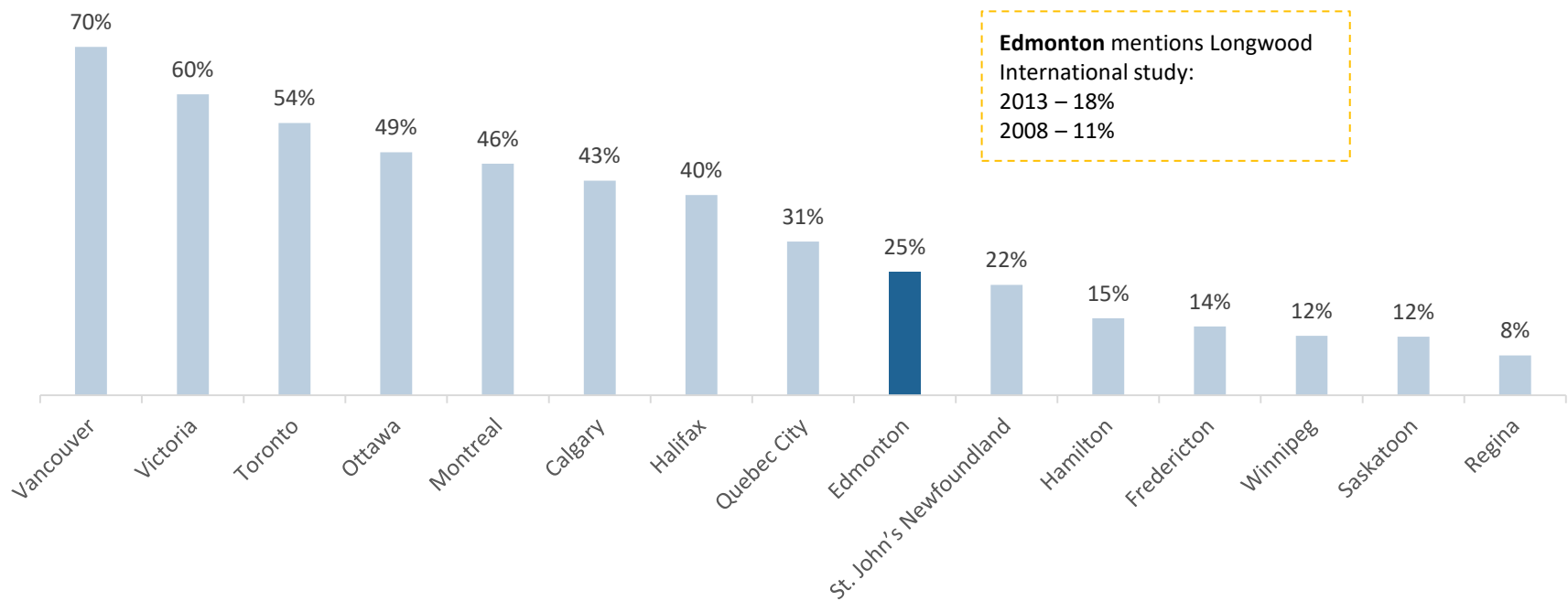


APPENDIX B

URBAN CANADIANS SURVEY RESULTS

OVERALL PERCEPTIONS OF EDMONTON

The majority of Urban Canadians most wish to live in Vancouver, Victoria, and/or Toronto. While one-in-four (25%) cite Edmonton as the city they would most wish to live.

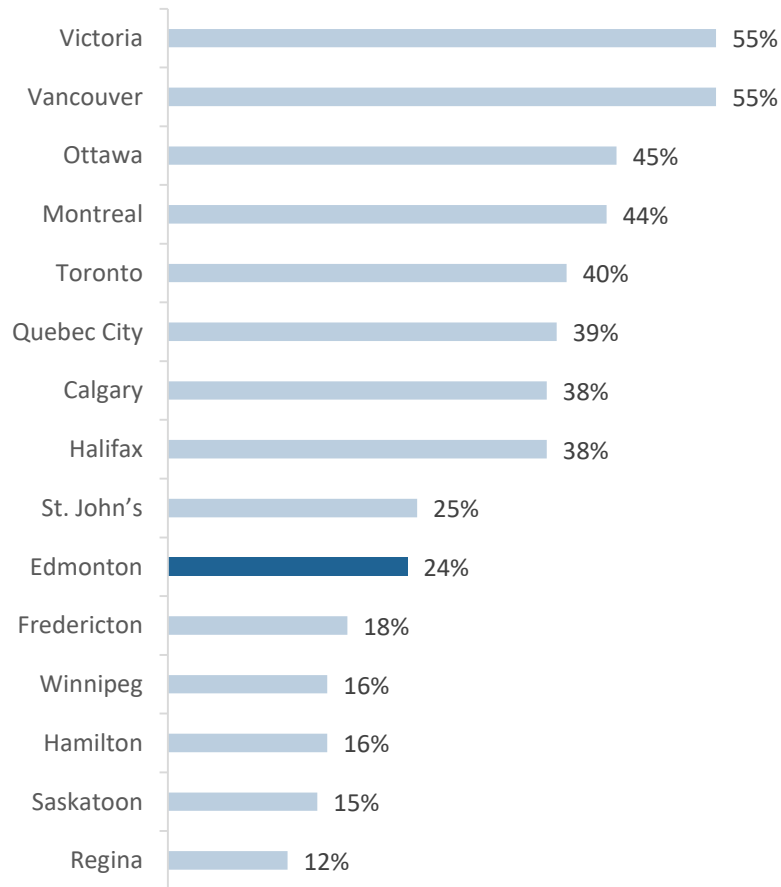


Most Wished City to Live in

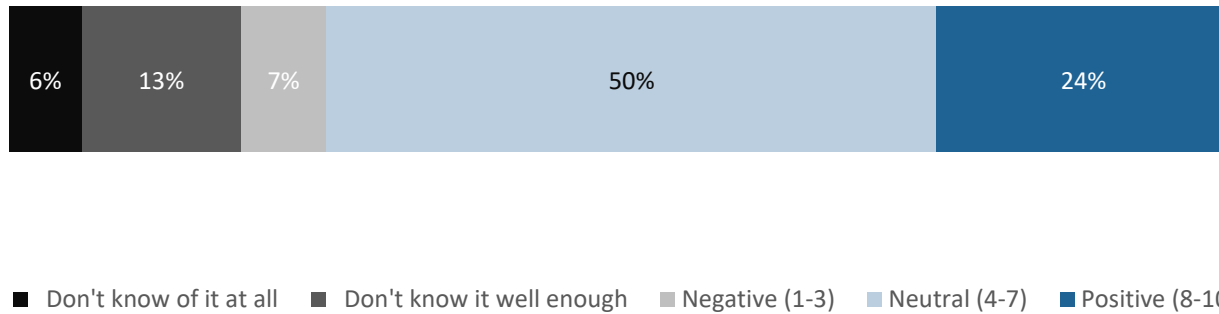
	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Vancouver	70%	67%	70%	68%	71%
Victoria	60%	71%	59%	62%	59%
Toronto	54%	34%	56%	51%	58%
Ottawa	49%	30%	50%	41%	54%
Montreal	46%	31%	48%	41%	50%
Calgary	43%	55%	42%	56%	37%
Halifax	40%	32%	41%	41%	41%
Quebec City	31%	16%	32%	20%	36%
Edmonton	25%	82%	19%	28%	16%
St. John's Newfoundland	22%	23%	22%	21%	22%
Hamilton	15%	9%	16%	12%	17%
Fredericton	14%	13%	14%	14%	14%
Winnipeg	12%	10%	12%	16%	11%
Saskatoon	12%	19%	11%	20%	8%
Regina	8%	9%	8%	11%	7%

% is significantly higher than % (within segment grouping)

Urban Canadians have the most positive impressions (8-10 ratings) for Victoria and Vancouver, with Edmonton ranking 10th.



Half (50%) of Urban Canadians indicate having a neutral impression (4-7 rating) of Edmonton, followed by nearly one-in-four (24%) who cite having a positive impression (8-10 rating) of the city.

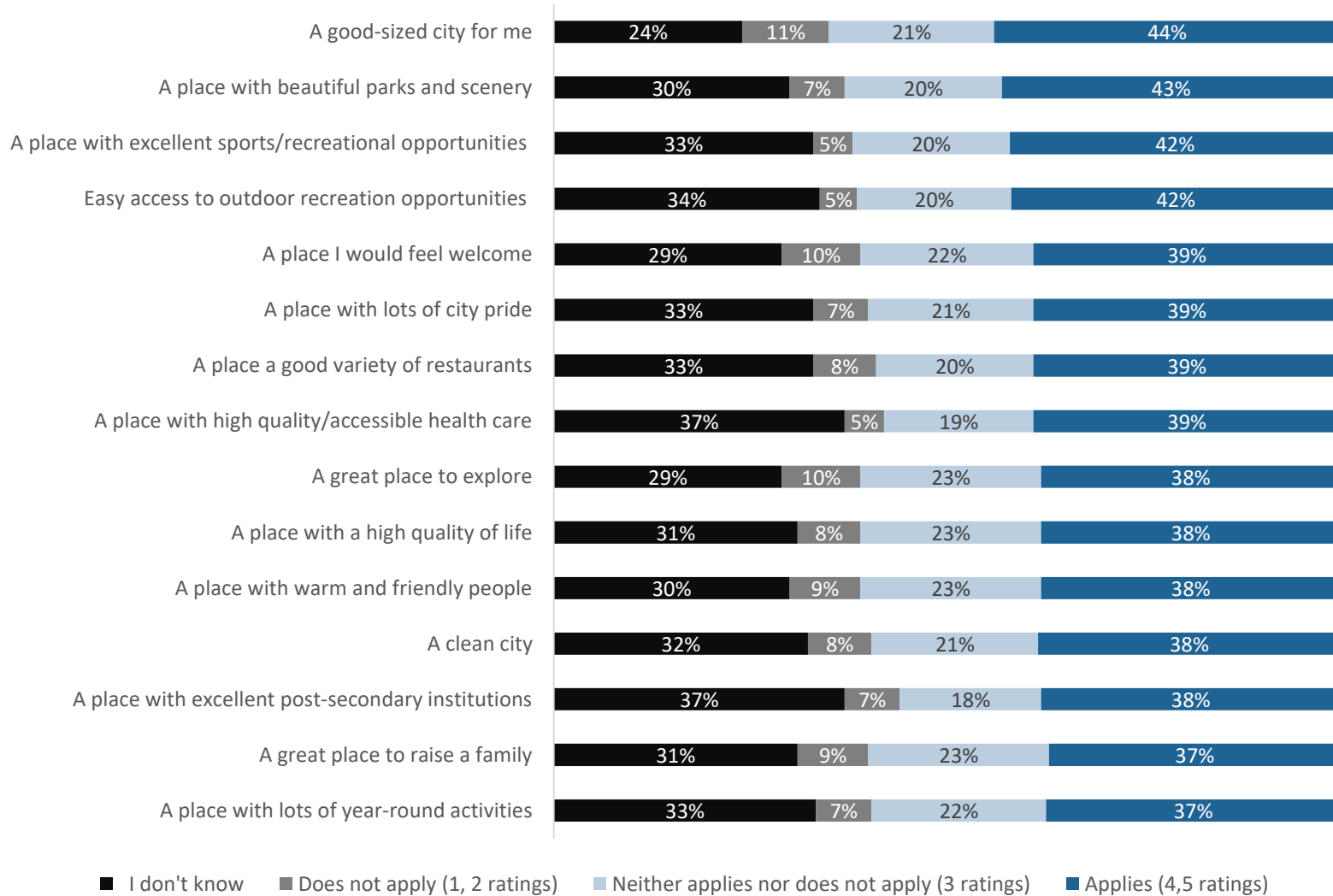


Positive Impressions (8-10 ratings)

	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Victoria	55%	62%	54%	65%	51%
Vancouver	55%	50%	55%	60%	54%
Ottawa	45%	32%	46%	48%	46%
Montreal	44%	29%	45%	46%	46%
Toronto	40%	26%	41%	42%	41%
Quebec City	39%	25%	40%	37%	42%
Calgary	38%	42%	38%	56%	31%
Halifax	38%	30%	39%	46%	37%
St. John's	25%	22%	26%	33%	23%
Edmonton	24%	60%	21%	30%	18%
Fredericton	18%	16%	18%	23%	17%
Winnipeg	16%	11%	16%	23%	14%
Hamilton	16%	11%	17%	23%	15%
Saskatoon	15%	20%	15%	23%	12%
Regina	12%	13%	12%	20%	10%

% is significantly higher than % (within segment grouping)

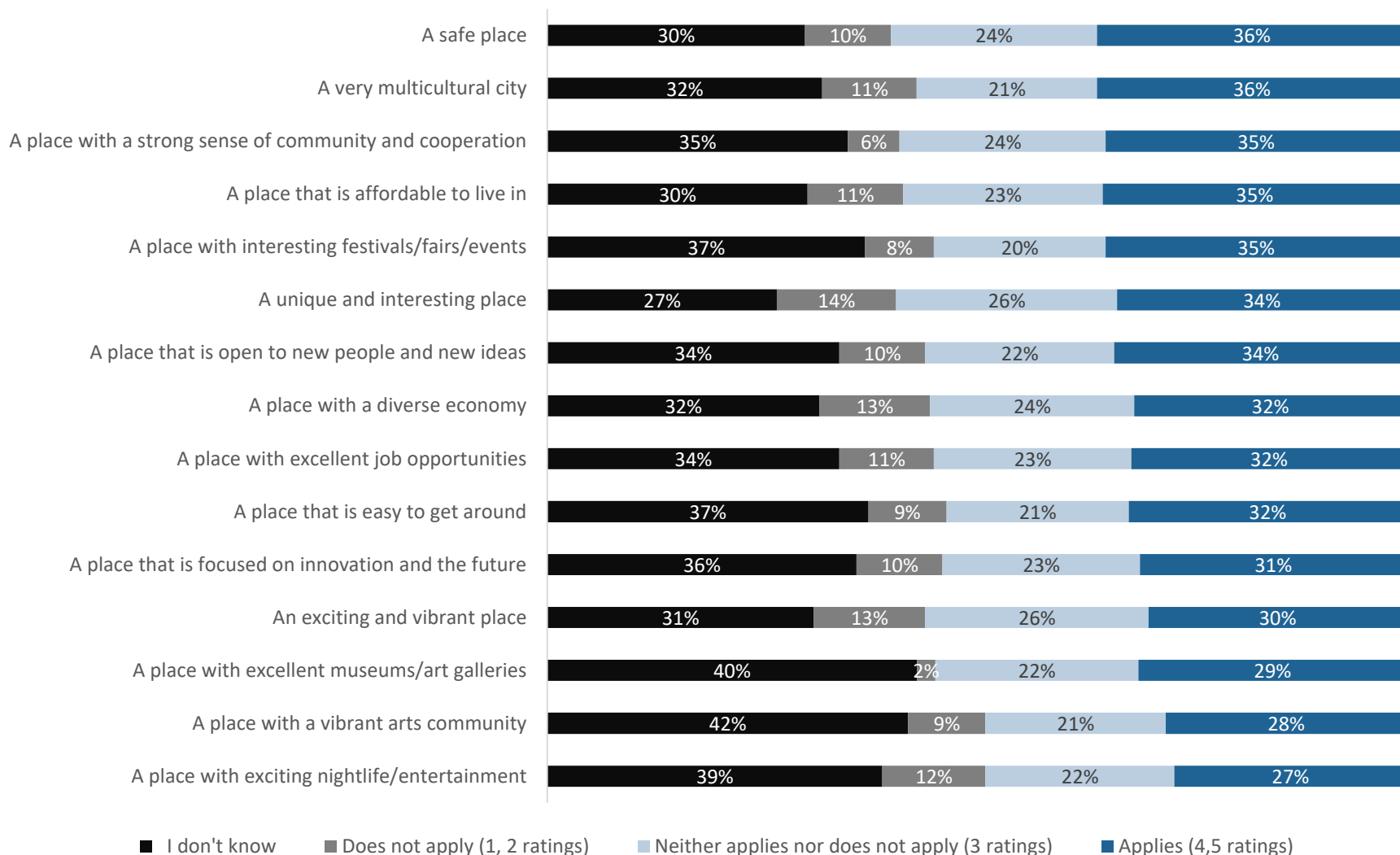
Urban Canadians most strongly feel that Edmonton is a good sized city for them, has beautiful parks and scenery, and has excellent sports/recreational opportunities.



Base: Urban Canadians (n=3,619)

Q.3 - For each of the following statements, please rate "Edmonton" on a scale from 1 to 5 where 1 means the statement does not apply to that City at all and 5 means in applies completely to that City.

Urban Canadians least associate Edmonton with being a place that has excellent museums/art galleries, a vibrant arts community, and having exciting nightlife/entertainment. It should be noted that between 24% and 42% of Urban Canadians do not know whether a statement applies to Edmonton or not.



Base: Urban Canadians (n= 3,619)

Q.3 - For each of the following statements, please rate "Edmonton" on a scale from 1 to 5 where 1 means the statement does not apply to that City at all and 5 means in applies completely to that City.

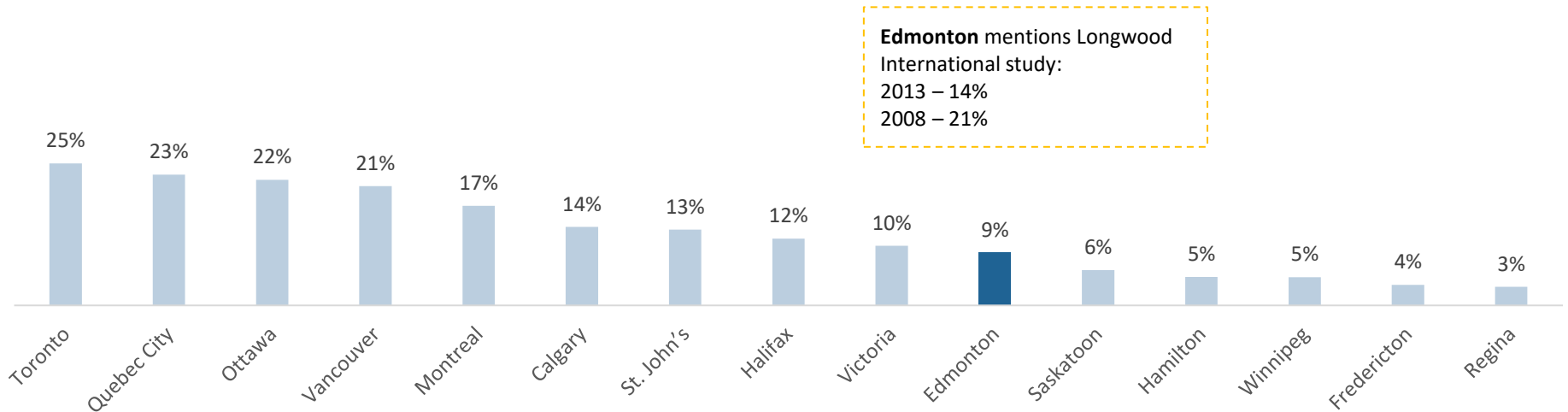
Summary of Statements that Apply (4, 5 rating) to Edmonton

	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
A good-sized city for me	44%	76%	41%	55%	36%
A place with beautiful parks and scenery	43%	79%	40%	58%	34%
A place with excellent sports/recreational opportunities	42%	74%	39%	59%	32%
Easy access to outdoor recreation opportunities	42%	76%	39%	62%	31%
A place with high quality/accessible health care	39%	76%	36%	58%	28%
A place I would feel welcome	39%	74%	36%	52%	30%
A place with lots of city pride	39%	66%	36%	53%	31%
A place a good variety of restaurants	39%	75%	35%	60%	27%
A place with excellent post-secondary institutions	38%	82%	34%	58%	26%
A great place to explore	38%	62%	36%	50%	32%
A clean city	38%	53%	37%	53%	31%
A place with a high quality of life	38%	66%	36%	55%	29%
A place with warm and friendly people	38%	64%	35%	53%	29%
A place with lots of year-round activities	37%	72%	34%	55%	27%
A great place to raise a family	37%	70%	34%	52%	28%
A safe place	36%	54%	35%	49%	30%
A very multicultural city	36%	81%	32%	51%	25%
A place that is affordable to live in	35%	58%	33%	49%	28%
A place with interesting festivals/fairs/events	35%	84%	31%	53%	23%
A place with a strong sense of community and cooperation	35%	61%	32%	47%	27%
A place that is open to new people and new ideas	34%	65%	31%	50%	25%
A unique and interesting place	34%	51%	32%	43%	28%
A place that is easy to get around	32%	61%	30%	48%	23%
A place with excellent job opportunities	32%	55%	30%	46%	24%
A place with a diverse economy	32%	57%	29%	46%	24%
A place that is focused on innovation and the future	31%	57%	28%	46%	22%
An exciting and vibrant place	30%	53%	28%	41%	24%
A place with excellent museums/art galleries	29%	65%	25%	42%	19%
A place with a vibrant arts community	28%	66%	24%	42%	18%
A place with exciting nightlife/entertainment	27%	53%	24%	43%	18%

% is significantly higher than % (within segment grouping)

RECALL OF ADVERTISING

Excluding the city in which they live, Urban Canadians most recall seeing, reading, or hearing advertising for Toronto, followed by Quebec City, and Ottawa. Nearly one-in-ten (9%) recall any advertising for Edmonton.



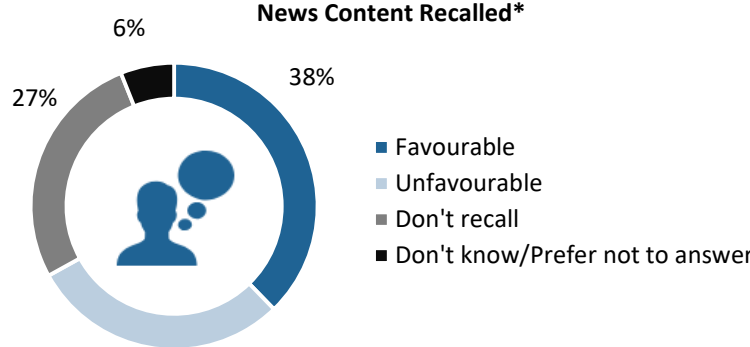
Advertising Recall for Canadian Cities

	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Toronto	25%	19%	25%	24%	26%
Quebec City	23%	7%	24%	17%	27%
Ottawa	22%	9%	23%	16%	26%
Vancouver	21%	28%	20%	24%	18%
Montreal	17%	9%	18%	19%	18%
Calgary	14%	42%	11%	15%	10%
St. John's	13%	12%	13%	18%	11%
Halifax	12%	11%	12%	14%	11%
Victoria	10%	15%	10%	14%	8%
Edmonton	9%	-	10%	19%	7%
Saskatoon	6%	14%	5%	11%	3%
Hamilton	5%	3%	5%	6%	5%
Winnipeg	5%	8%	5%	9%	3%
Fredericton	4%	3%	4%	5%	3%
Regina	3%	7%	3%	7%	1%

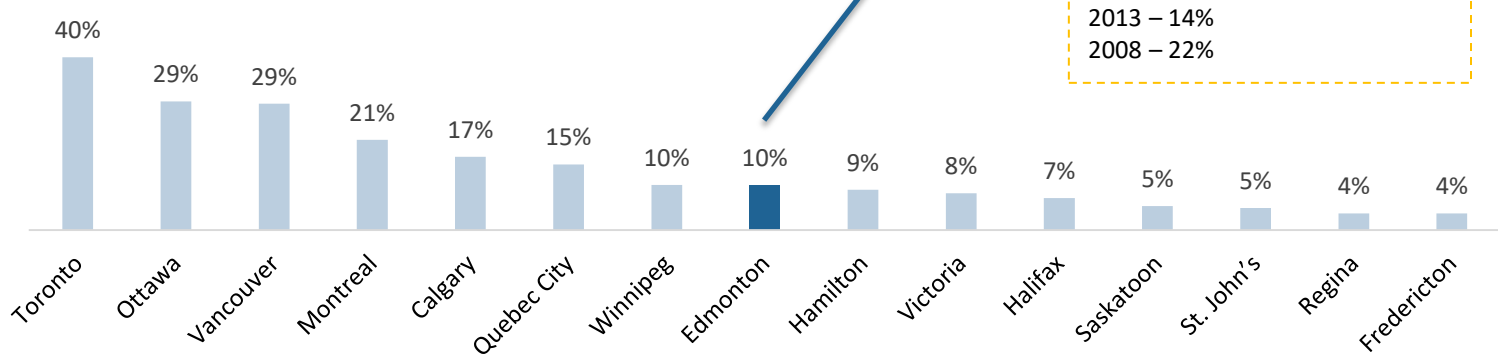
% is significantly higher than % (within segment grouping)

Urban Canadians most recall reading or hearing about Toronto in the news. One-in-ten (10%) recall Edmonton in the news, with the greatest proportion indicating the majority of what they recall as favourable.

News Content Recalled*



Canadian Cities in the News



Edmonton mentions Longwood International study:
 2013 – 14%
 2008 – 22%

Base: Urban Canadians (n=3,619)

*Base: Urban Canadians excluding Edmontonians who recall reading or hearing about Edmonton in the news recently (n=459)

Q.5 - Not including the city in which you currently live, from which of the following cities do you recall reading or hearing about in the news recently? Q.6 - Would you say the majority of what you recall reading or hearing in the news regarding the City of Edmonton is...

Canadian Cities in the News and News Content Recalled for Edmonton

Canadian Cities in the News	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Toronto	40%	49%	39%	42%	38%
Ottawa	29%	26%	30%	27%	31%
Vancouver	29%	38%	28%	33%	27%
Montreal	21%	17%	21%	22%	21%
Calgary	17%	43%	14%	22%	12%
Quebec City	15%	7%	16%	12%	17%
Winnipeg	10%	15%	10%	14%	8%
Edmonton	10%	-	11%	20%	8%
Hamilton	9%	6%	10%	12%	9%
Victoria	8%	8%	8%	13%	7%
Halifax	7%	5%	8%	9%	7%
Saskatoon	5%	12%	5%	8%	4%
St. John's	5%	4%	5%	7%	4%
Regina	4%	4%	4%	5%	3%
Fredericton	4%	2%	4%	5%	3%

News Content Recalled* (Edmonton only)	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	459	-	459	264	190
Favourable	38%	-	38%	38%	38%
Unfavourable	29%	-	29%	33%	26%
Don't recall	27%	-	27%	24%	30%
Don't know/Prefer not to answer	6%	-	6%	5%	6%

Base: Urban Canadians

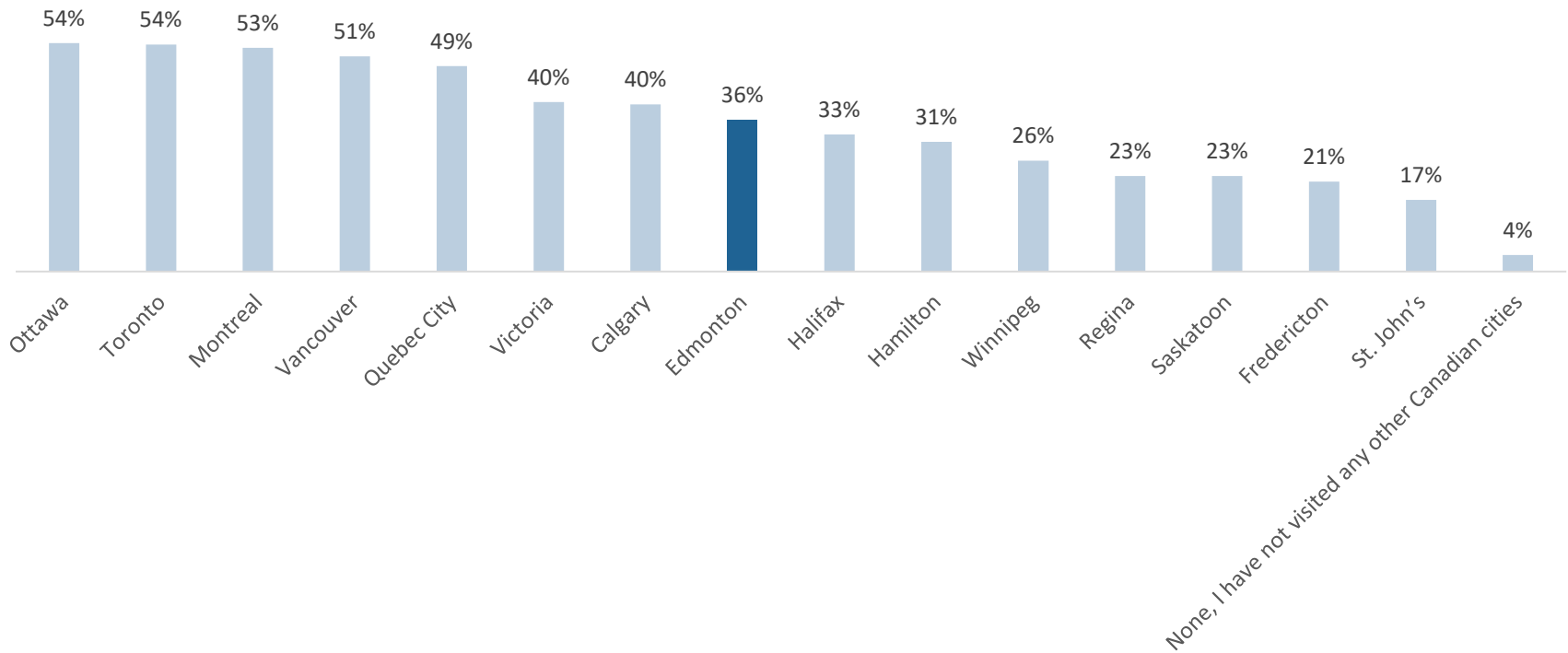
% is significantly higher than % (within segment grouping)

*Base: Urban Canadians who recall reading or hearing about Edmonton in the news recently (n=459)

Q.5 - Not including the city in which you currently live, from which of the following cities do you recall reading or hearing about in the news recently? Q.6 - Would you say the majority of what you recall reading or hearing in the news regarding the City of Edmonton is...

LIVING IN AND VISITING EDMONTON

The majority of Urban Canadians indicate that they have visited Ottawa, Toronto, and/or Montreal. Edmonton is the 8th most visited city, with over one-third (36%) of Urban Canadians citing having ever visited the city.



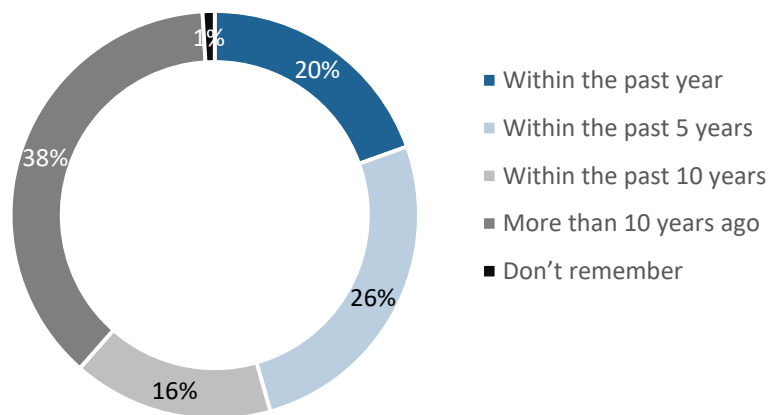
Canadian Cities Urban Canadians Have Ever Visited

	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Ottawa	54%	42%	56%	52%	58%
Toronto	54%	59%	54%	58%	52%
Montreal	53%	45%	54%	58%	53%
Vancouver	51%	79%	49%	64%	44%
Quebec City	49%	31%	51%	45%	53%
Victoria	40%	63%	38%	56%	32%
Calgary	40%	88%	35%	47%	32%
Edmonton	36%	-	39%	71%	28%
Halifax	33%	30%	33%	40%	31%
Hamilton	31%	23%	32%	37%	30%
Winnipeg	26%	43%	25%	42%	19%
Regina	23%	40%	21%	38%	15%
Saskatoon	23%	49%	20%	37%	14%
Fredericton	21%	16%	22%	26%	21%
St. John's	17%	18%	17%	22%	15%
None, I have not visited any other Canadian cities	4%	2%	4%	2%	4%

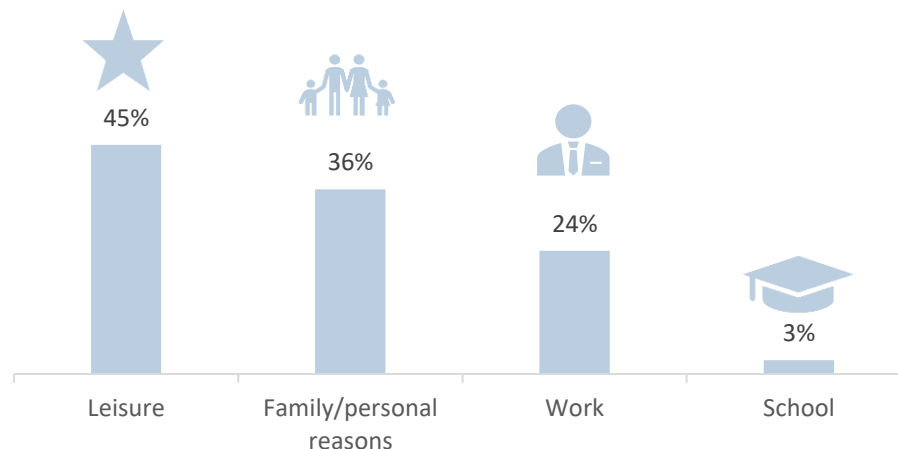
% is significantly higher than % (within segment grouping)

Urban Canadians (excluding Edmontonians) who have visited Edmonton, did so within the past 5 years. The most common cited reason for their visit was leisure, followed by family/personal reasons. The majority of visitors stayed in Edmonton between one day and one week during their last visit.

When Did Urban Canadians Last Visit Edmonton?



Reason for Visiting Edmonton*



Length of Stay During Last Visit to Edmonton**

12%

Less than a day

70%

From one day to a week

9%

One to two weeks

7%

More than two weeks

Base: Urban Canadians excluding Edmontonians (n=1,580)

*Mentions less than 3% not shown

**'Don't remember' responses not shown

Q.8 - When was the last time you visited Edmonton? Q.9 - For what reason(s) did you visit Edmonton? Q.10 - On your last visit to Edmonton, how long did you stay in or near the City?

Urban Canadians Who Have Visited Edmonton...

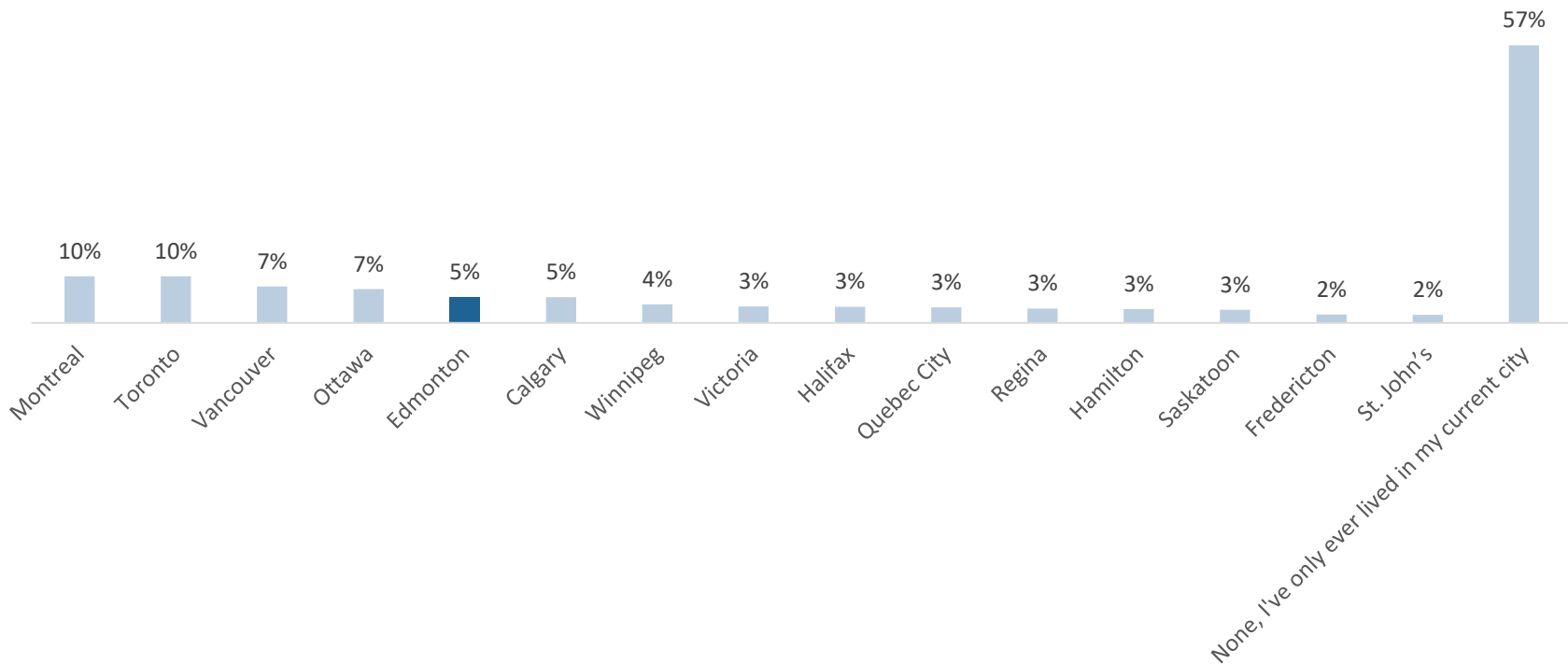
Last Visit	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	1580	803	770
Within the past year	20%	32%	8%
Within the past 5 years	26%	32%	20%
Within the past 10 years	16%	15%	16%
More than 10 years ago	38%	20%	54%
Don't remember	1%	1%	1%

Reasons for Visiting	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	1580	803	770
Leisure	45%	40%	50%
Family/personal reasons	36%	42%	31%
Work	24%	28%	21%
School	3%	3%	2%
Sports event/competition	1%	1%	1%
Just passing through	1%	1%	1%
Used to live there	1%	1%	<1%
Other	1%	1%	1%
Don't know/Prefer not to answer	1%	1%	1%

Length of Stay During Last Visit	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	1580	803	770
Less than a day	12%	11%	13%
From one day to a week	70%	71%	69%
One to two weeks	9%	8%	11%
Two weeks to a month	3%	4%	3%
A month to six months	2%	3%	1%
More than 6 months	2%	4%	1%
Don't remember	2%	1%	4%

% is significantly higher than % (within segment grouping)

Nearly three-in-five (57%) Urban Canadians have only ever lived in their current city. The remaining appear to be fairly dispersed, with Montreal and Toronto being mentioned most frequently.

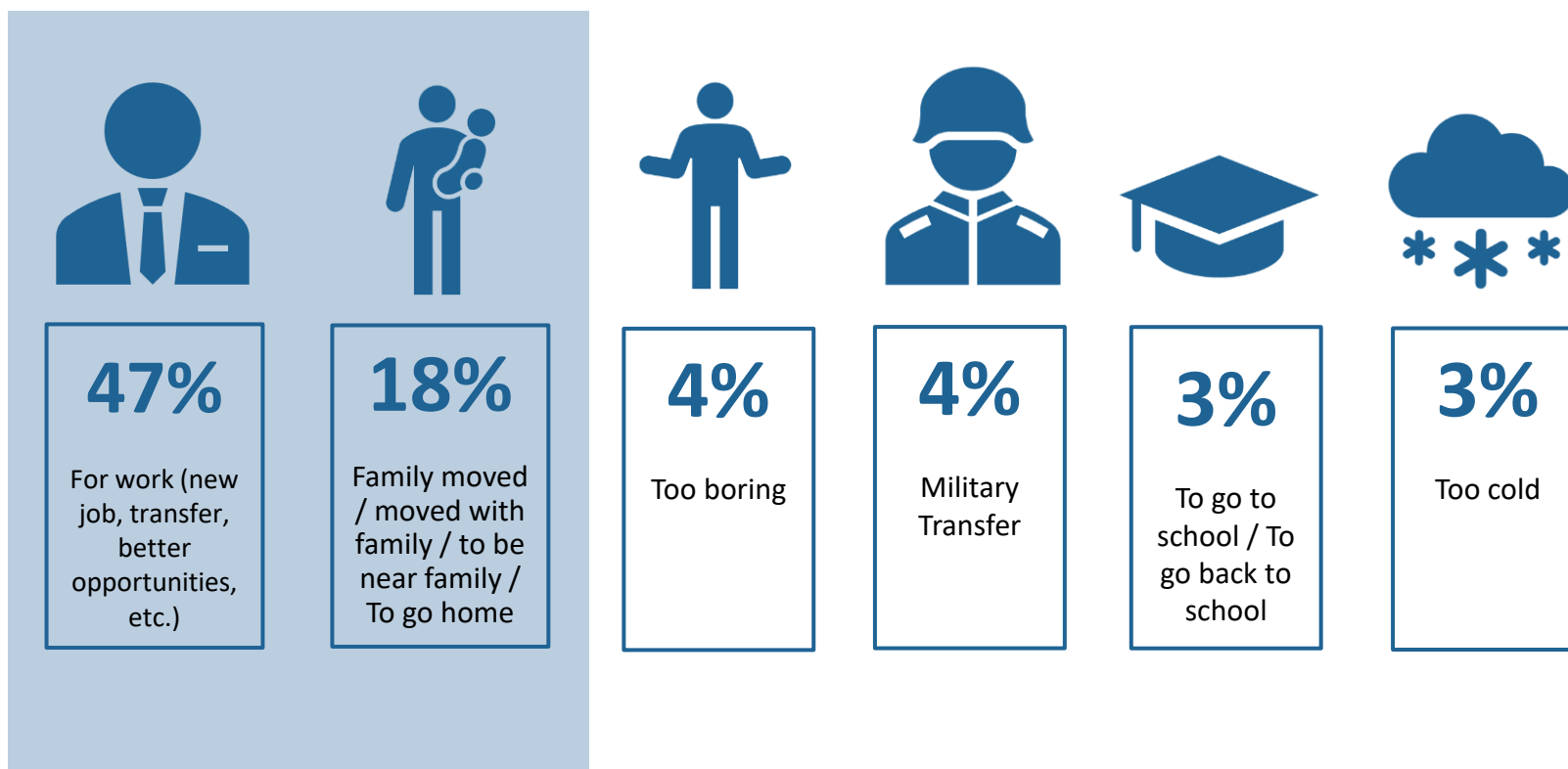


Cities in Which Urban Canadians Have Ever Lived (excluding their current city)

	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Montreal	10%	6%	10%	12%	9%
Toronto	10%	8%	10%	14%	8%
Vancouver	7%	10%	7%	12%	6%
Ottawa	7%	6%	7%	9%	6%
Edmonton	5%	-	6%	17%	2%
Calgary	5%	19%	4%	9%	2%
Winnipeg	4%	6%	4%	6%	3%
Victoria	3%	5%	3%	5%	3%
Halifax	3%	5%	3%	5%	2%
Quebec City	3%	2%	3%	4%	3%
Regina	3%	4%	3%	7%	1%
Hamilton	3%	2%	3%	4%	2%
Saskatoon	3%	5%	2%	6%	1%
Fredericton	2%	3%	2%	3%	1%
St. John's	2%	2%	2%	3%	1%
None, I've only ever lived in my current city	57%	51%	57%	38%	64%

% is significantly higher than % (within segment grouping)

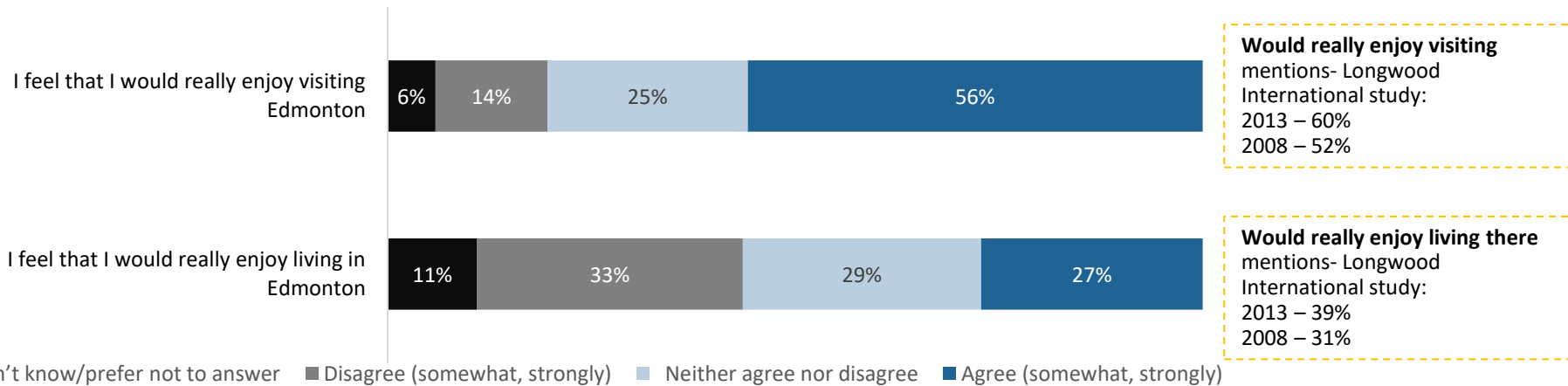
Among those Urban Canadians who have moved away from Edmonton, the most cited reason for their move is work, followed by family reasons.



Reasons for Moving Away From Edmonton

	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	250	207	40
For work (new job, transfer, better opportunities, etc.)	47%	53%	27%
Family moved / moved with family / to be near family / To go home	18%	17%	26%
Too boring	4%	6%	-
Military transfer	4%	4%	6%
Finished school and returned home	3%	4%	1%
To go to school / To go back to school	3%	3%	4%
Too cold	3%	4%	-
Extreme weather	3%	3%	3%
To get married / raise a family	2%	2%	2%
Marriage breakup / Relationship breakup	2%	2%	-
Poor infrastructure	2%	2%	-
Do not like Edmonton	2%	1%	-
To retire	1%	1%	-
Looking for new start / Change	1%	1%	-
Do not like city life moved to a farm/rural	1%	1%	<1%
Not a friendly city	1%	1%	1%
Too much crime	1%	1%	<1%
Other	9%	3%	32%
None / Nothing	<1%	<1%	-
Don't know / Refused	6%	7%	3%

Based on Urban Canadians (excluding Edmontonians) perceptions of Edmonton, nearly three-in-five (56%) indicate that they feel they would really enjoy visiting Edmonton, while nearly three-in-ten (27%) indicate that they feel they would really enjoy living in Edmonton.



Saskatoon, Winnipeg, and Regina residents are more likely to agree that they feel Edmonton would be a city they would enjoy visiting.

Those either between the ages of 18 to 34 years, those with a high school education or less, and those with children in their household, are more likely to agree that they would enjoy visiting Edmonton.

Saskatoon, Winnipeg, and Regina residents are more likely to agree that they feel Edmonton would be a city they would enjoy living in.

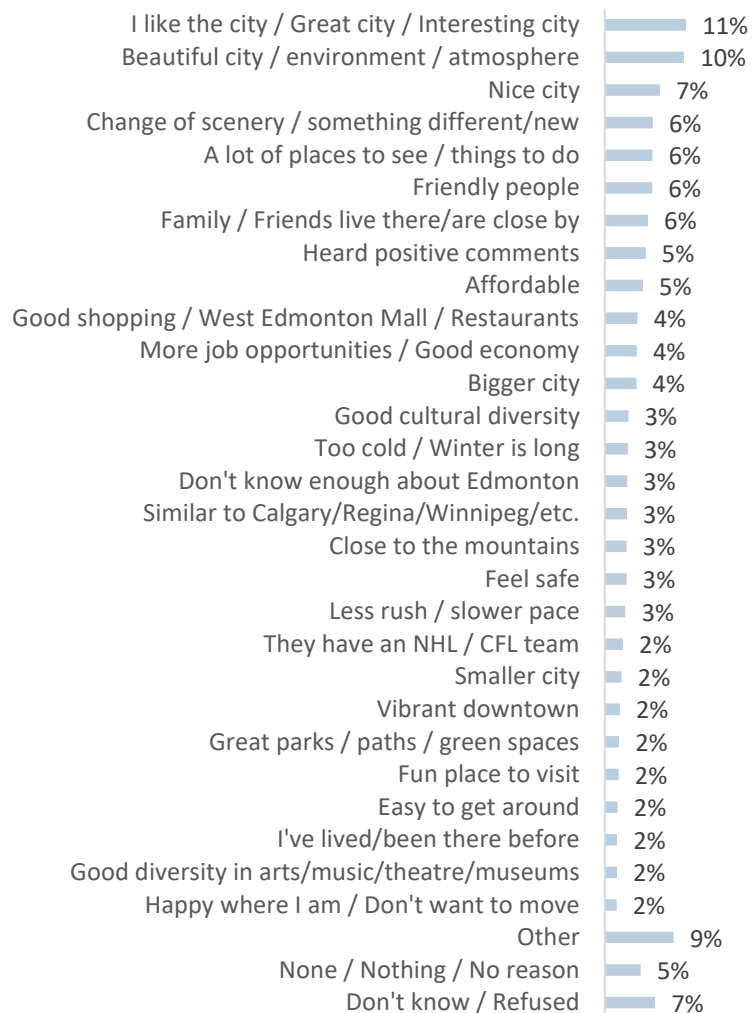
Males, those between the ages of 18 and 54 years, and those with children in their household, are more likely to agree that they would enjoy living in Edmonton.

Visiting and Living in Edmonton

Agree (somewhat, strongly)	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3118	1058	2008
I feel that I would really enjoy visiting Edmonton	56%	63%	54%
I feel that I would really enjoy living in Edmonton	27%	43%	22%

% is significantly higher than **%** (within segment grouping)

Liking Edmonton, thinking it is a great or interesting city, and/or that it is a beautiful city or environment/atmosphere are among the top mentions among Urban Canadians (excluding Edmontonians), who agree (somewhat, strongly) they would enjoy living in Edmonton.



Reasons Why Urban Canadians Agree They Would Enjoy Living Edmonton

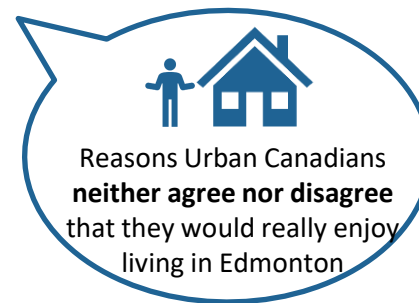
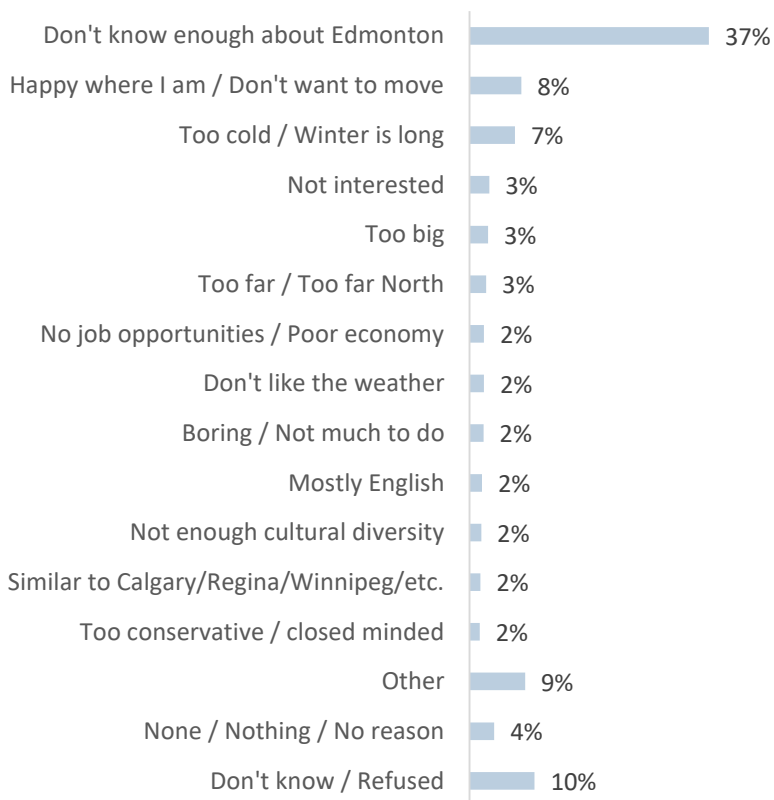
Agree (somewhat, strongly)	City		
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	953	483	467
I like the city / Great city / Interesting city	11%	14%	8%
Beautiful city / environment / atmosphere	10%	11%	9%
Nice city	7%	7%	7%
Change of scenery / something different/new	6%	2%	9%
A lot of places to see / things to do	6%	7%	6%
Friendly people	6%	7%	5%
Family / Friends live there/are close by	6%	8%	4%
Heard positive comments	5%	2%	8%
Affordable	5%	6%	4%
Good shopping / West Edmonton Mall / Restaurants	4%	6%	3%
More job opportunities / Good economy	4%	4%	4%
Bigger city	4%	3%	4%
Good cultural diversity	3%	2%	4%
Too cold / Winter is long	3%	5%	1%
Don't know enough about Edmonton	3%	<1%	5%
Similar to Calgary/Regina/Winnipeg/etc.	3%	3%	3%
Close to the mountains	3%	2%	3%
Feel safe	3%	1%	4%
Less rush / slower pace	3%	1%	4%
They have an NHL / CFL team	2%	2%	2%
Smaller city	2%	1%	3%
Vibrant downtown	2%	2%	2%
Great parks / paths / green spaces	2%	3%	1%
Fun place to visit	2%	1%	3%
Easy to get around	2%	3%	1%
I've lived/been there before	2%	4%	<1%
Good diversity in arts/music/theatre/museums	2%	2%	1%
Happy where I am / Don't want to move	2%	3%	1%
Other	9%	9%	9%
None / Nothing / No reason	5%	8%	2%
Don't know / Refused	7%	3%	9%

Base: Urban Canadians, excluding Edmontonians, who agree (somewhat, strongly) they would enjoy living in Edmonton

Mentions 2% or less not shown

Q.13a - Why do you "strongly/somewhat agree" that you would really enjoy living in Edmonton?

Not knowing enough about Edmonton is the top mention among Urban Canadians (excluding Edmontonians), who neither agree nor disagree they would enjoy living Edmonton.



Reasons Why Urban Canadians Neither Agree nor Disagree They Would Enjoy Living Edmonton

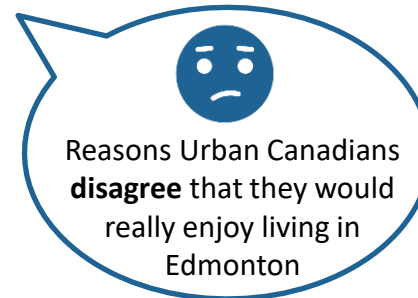
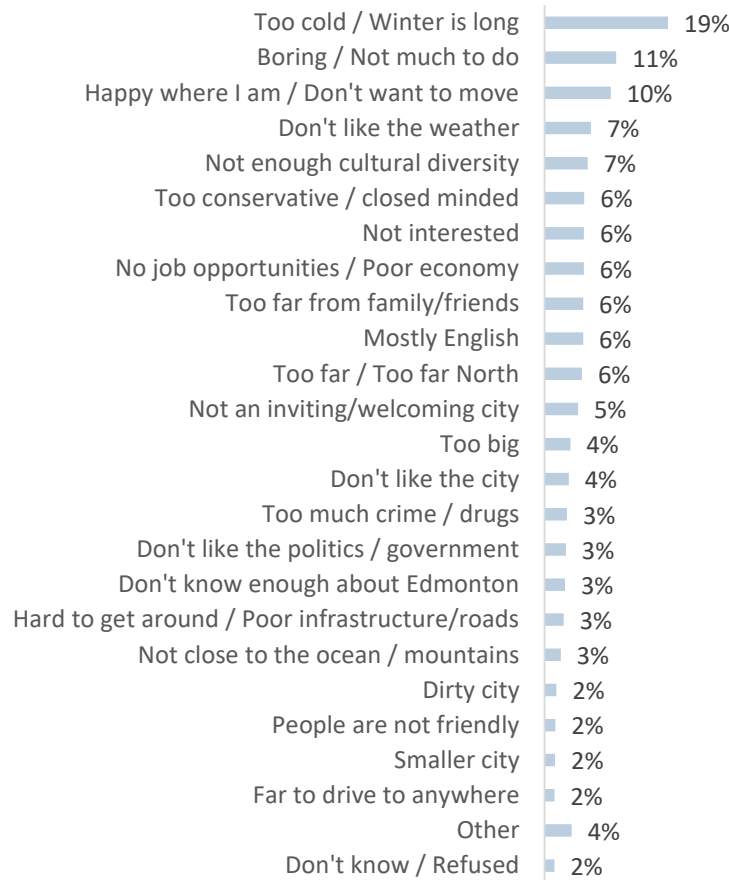
Neither agree nor disagree	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	886	227	641
Don't know enough about Edmonton	37%	7%	45%
Happy where I am / Don't want to move	8%	6%	9%
Too cold / Winter is long	7%	16%	5%
Not interested	3%	3%	3%
Too big	3%	5%	2%
Too far / Too far North	3%	5%	2%
No job opportunities / Poor economy	2%	6%	1%
Don't like the weather	2%	7%	1%
Boring / Not much to do	2%	6%	1%
Mostly English	2%	1%	2%
Not enough cultural diversity	2%	6%	1%
Similar to Calgary/Regina/Winnipeg/etc.	2%	5%	1%
Too conservative / closed minded	2%	1%	2%
Other	9%	15%	7%
None / Nothing / No reason	4%	3%	4%
Don't know / Refused	10%	7%	11%

Base: Urban Canadians, excluding Edmontonians, who neither agree nor disagree they would enjoy living in Edmonton

Mentions 2% or less not shown

Q.13a - Why do you "neither agree nor disagree" that you would really enjoy living in Edmonton?

Too cold and/or long winters is the top mention among Urban Canadians (excluding Edmontonians), who disagree (somewhat, strongly) they would enjoy living in Edmonton.



Reasons Why Urban Canadians Disagree They Would Enjoy Living Edmonton

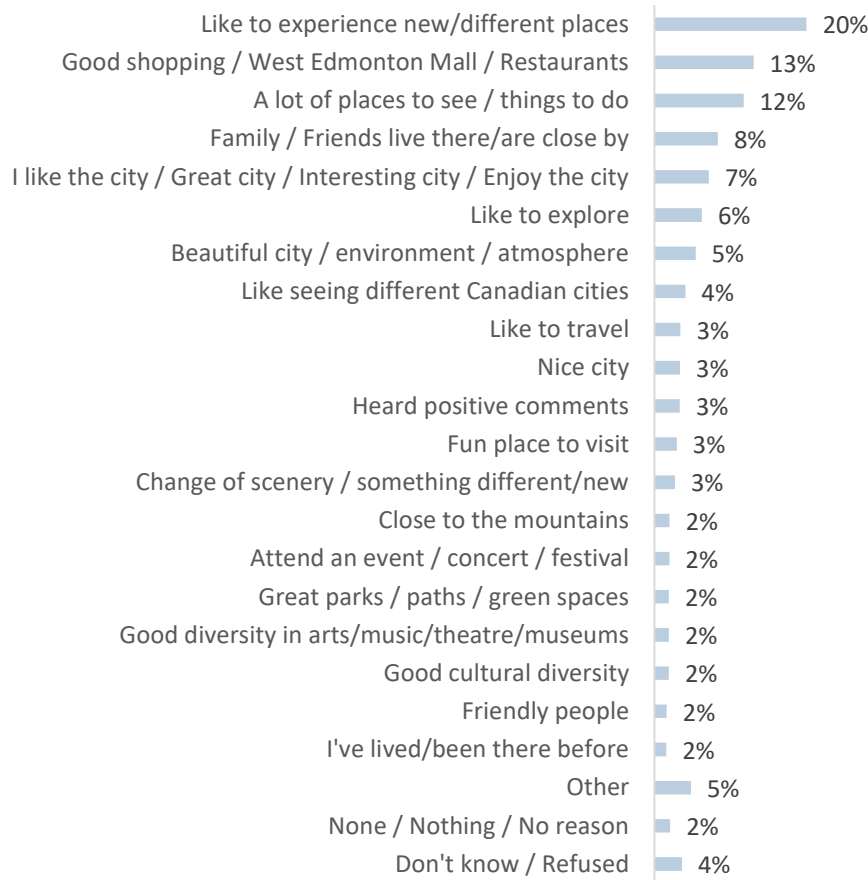
Disagree (somewhat, strongly)	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	1,003	341	658
Too cold / Winter is long	19%	23%	18%
Boring / Not much to do	11%	10%	12%
Happy where I am / Don't want to move	10%	4%	13%
Don't like the weather	7%	11%	6%
Not enough cultural diversity	7%	7%	7%
Too conservative / closed minded	6%	7%	6%
Not interested	6%	3%	8%
No job opportunities / Poor economy	6%	5%	7%
Too far from family/friends	6%	3%	7%
Mostly English	6%	-	8%
Too far / Too far North	6%	6%	6%
Not an inviting/welcoming city	5%	7%	4%
Too big	4%	6%	3%
Don't like the city	4%	10%	1%
Too much crime / drugs	3%	7%	2%
Don't like the politics / government	3%	4%	3%
Don't know enough about Edmonton	3%	<1%	4%
Hard to get around / Poor infrastructure/roads	3%	7%	2%
Not close to the ocean / mountains	3%	3%	2%
Dirty city	2%	4%	1%
People are not friendly	2%	4%	1%
Smaller city	2%	5%	<1%
Far to drive to anywhere	2%	3%	1%
Other	4%	4%	4%
Don't know / Refused	2%	1%	2%

Base: Urban Canadians, excluding Edmontonians, who somewhat/strongly disagree they would enjoy living in Edmonton

Mentions 2% or less not shown

Q.13a - Why do you "somewhat/strongly disagree" that you would really enjoy living in Edmonton?

The enjoyment of experiencing new/different places, and having good shopping (ex. West Edmonton Mall) and restaurants are the top mentions among Urban Canadians (excluding Edmontonians), who agree (somewhat, strongly) they would enjoy visiting Edmonton.



Reasons Why Urban Canadians Agree They Would Enjoy Visiting Edmonton

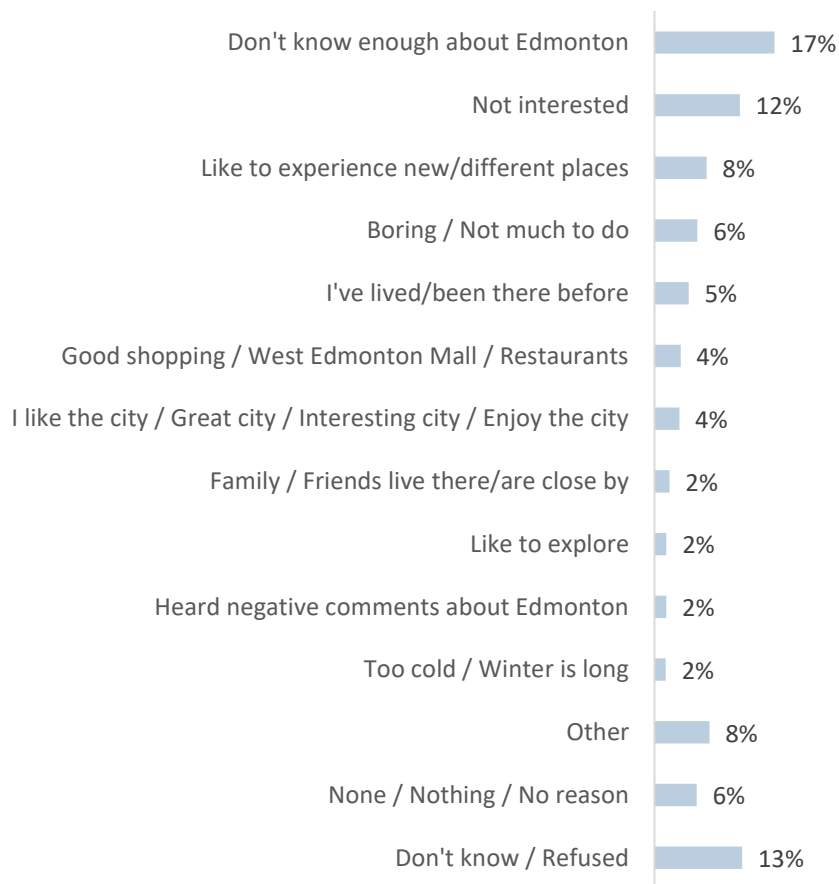
Agree (somewhat, strongly)	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	1840	715	1110
Like to experience new/different places	20%	6%	26%
Good shopping / West Edmonton Mall / Restaurants	13%	13%	13%
A lot of places to see / things to do	12%	18%	9%
Family / Friends live there/are close by	8%	17%	5%
I like the city / Great city / Interesting city / Enjoy the city	7%	11%	5%
Like to explore	6%	2%	8%
Beautiful city / environment / atmosphere	5%	6%	5%
Like seeing different Canadian cities	4%	<1%	6%
Like to travel	3%	1%	4%
Nice city	3%	5%	3%
Heard positive comments	3%	1%	4%
Fun place to visit	3%	3%	3%
Change of scenery / something different/new	3%	3%	3%
Close to the mountains	2%	1%	2%
Attend an event / concert / festival	2%	4%	1%
Great parks / paths / green spaces	2%	2%	2%
Good diversity in arts/music/theatre/museums	2%	3%	2%
Good cultural diversity	2%	2%	2%
Friendly people	2%	4%	<1%
I've lived/been there before	2%	4%	1%
Other	5%	6%	4%
None / Nothing / No reason	2%	5%	1%
Don't know / Refused	4%	5%	3%

Base: Urban Canadians, excluding Edmontonians, who agree (somewhat/strongly) they would enjoy visiting in Edmonton

Mentions 2% or less not shown

Q.13b - Why do you "strongly/somewhat agree" that you would really enjoy visiting Edmonton?

Not knowing enough about Edmonton, and/or not being interested are the top mentions among Urban Canadians (excluding Edmontonians), who neither agree nor disagree they would enjoy visiting Edmonton.



Reasons Why Urban Canadians Neither Agree nor Disagree They Would Enjoy Visiting Edmonton

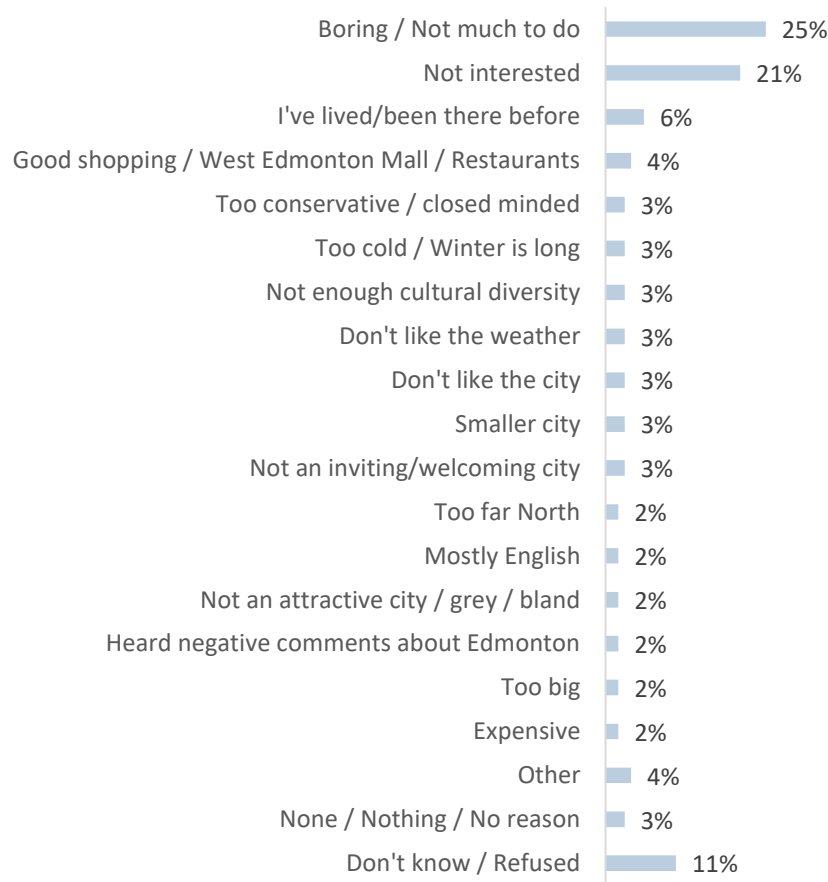
Neither agree nor disagree	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	716	170	536
Don't know enough about Edmonton	17%	2%	21%
Not interested	12%	11%	12%
Like to experience new/different places	8%	7%	7%
Boring / Not much to do	6%	13%	5%
I've lived/been there before	5%	11%	4%
Good shopping / West Edmonton Mall / Restaurants	4%	5%	4%
I like the city / Great city / Interesting city / Enjoy the city	4%	3%	4%
Family / Friends live there/are close by	2%	5%	1%
Like to explore	2%	<1%	2%
Heard negative comments about Edmonton	2%	1%	2%
Too cold / Winter is long	2%	4%	1%
Other	8%	8%	8%
None / Nothing / No reason	6%	4%	7%
Don't know / Refused	13%	13%	12%

Base: Urban Canadians, excluding Edmontonians, who neither agree nor disagree they would enjoy visiting in Edmonton

Mentions 2% or less not shown

Q.13b - Why do you "neither agree nor disagree" that you would really enjoy visiting Edmonton?

Being boring and/or not much to do, and being not interested, are the top mentions among Urban Canadians (excluding Edmontonians), who disagree (somewhat, strongly) they would enjoy visiting Edmonton.



Reasons Why Urban Canadians Disagree They Would Enjoy Visiting Edmonton

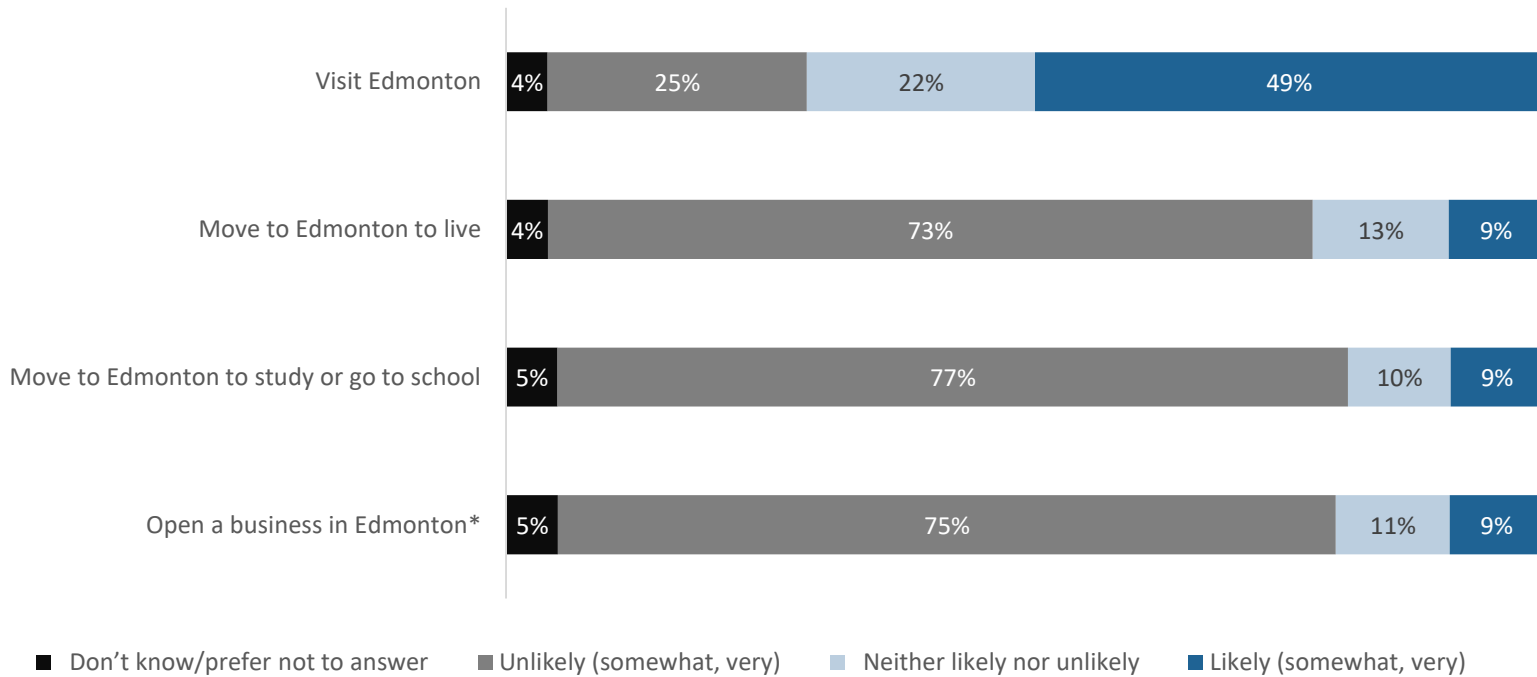
Disagree (somewhat, strongly)	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	405	171	230
Boring / Not much to do	25%	26%	24%
Not interested	21%	9%	28%
I've lived/been there before	6%	8%	4%
Good shopping / West Edmonton Mall / Restaurants	4%	6%	2%
Too conservative / closed minded	3%	7%	1%
Too cold / Winter is long	3%	2%	4%
Not enough cultural diversity	3%	3%	3%
Don't like the weather	3%	4%	2%
Don't like the city	3%	6%	1%
Smaller city	3%	6%	1%
Not an inviting/welcoming city	3%	4%	2%
Too far North	2%	<1%	3%
Mostly English	2%	-	3%
Not an attractive city / grey / bland	2%	4%	1%
Heard negative comments about Edmonton	2%	2%	2%
Too big	2%	2%	2%
Expensive	2%	<1%	3%
Other	4%	3%	4%
None / Nothing / No reason	3%	6%	2%
Don't know / Refused	11%	11%	12%

Base: Urban Canadians, excluding Edmontonians, who somewhat/strongly disagree they would enjoy visiting in Edmonton

Mentions 2% or less not shown

Q.13b - Why do you "somewhat/strongly disagree" that you would really enjoy visiting Edmonton?

Nearly half (49%) of Urban Canadians (excluding Edmontonians) indicate they would be likely (somewhat, very) to visit Edmonton. While nearly one-in-ten (9%) indicate they would be likely to move to, or study or go to school in Edmonton.



Base: Urban Canadians excluding Edmontonians (n=3,118)

*Base: Urban Canadians (n=3,619)

Q.14 - Based on your perceptions of the City of Edmonton, please indicate how likely you are to...

Likelihood of Urban Canadians to...

Likely (somewhat, strongly)	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3118	-	3118	1058	2008
Visit Edmonton	49%	-	49%	65%	44%
Move to Edmonton to live	9%	-	9%	21%	5%
Move to Edmonton to study or go to school	9%	-	9%	17%	6%
n=	3619	501	3118	1058	2008
Open a business in Edmonton*	9%	28%	7%	17%	3%

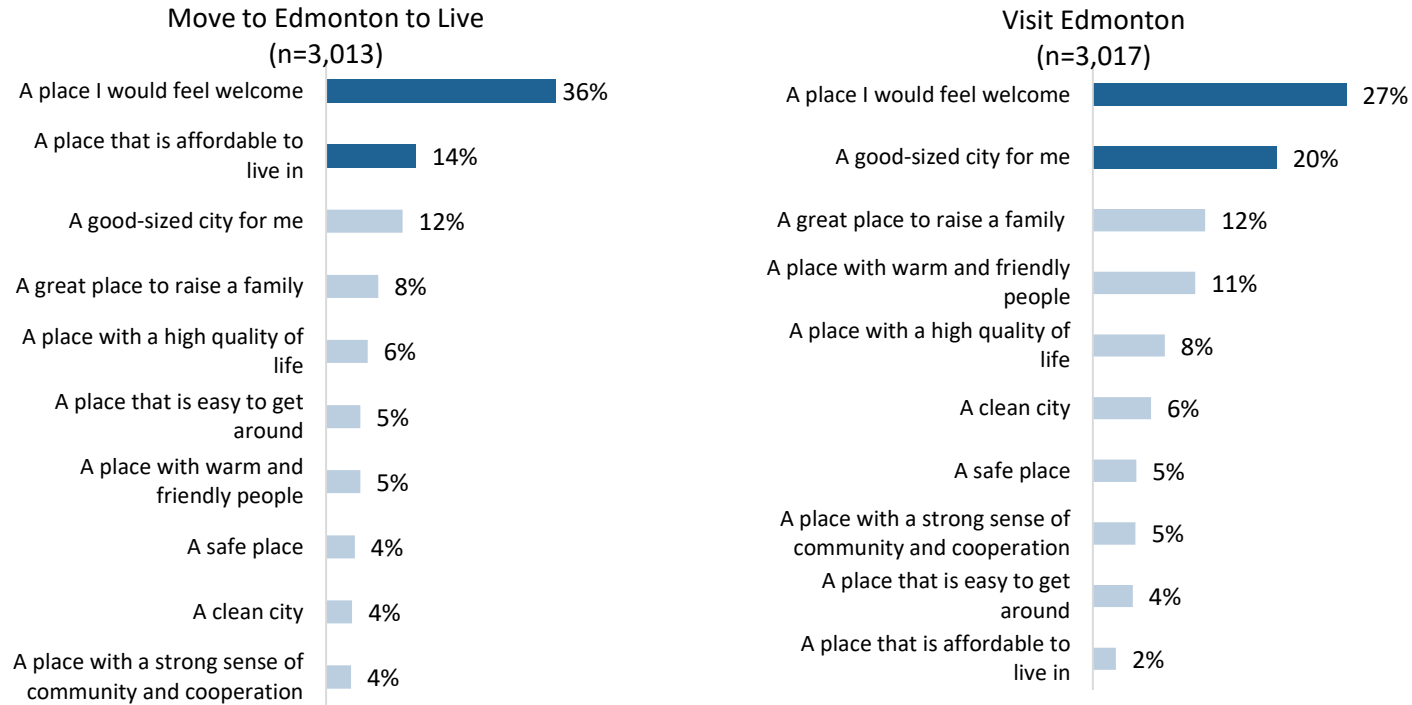
% is significantly higher than % (within segment grouping)

Base: Urban Canadians, excluding Edmontonians

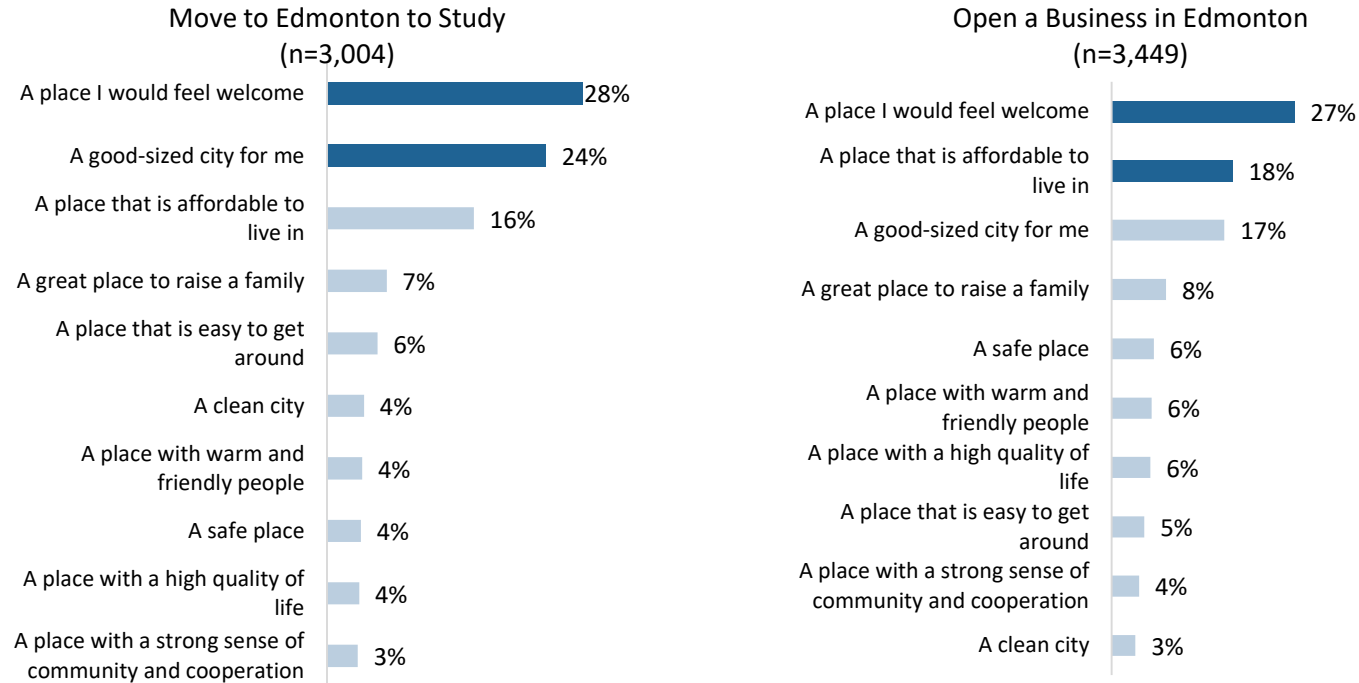
*Base: Urban Canadians

Q.14 - Based on your perceptions of the City of Edmonton, please indicate how likely you are to...

Basic Quality Drivers: What drivers influence basic qualities of Edmonton (safety, peaceful, cleanliness, etc.)



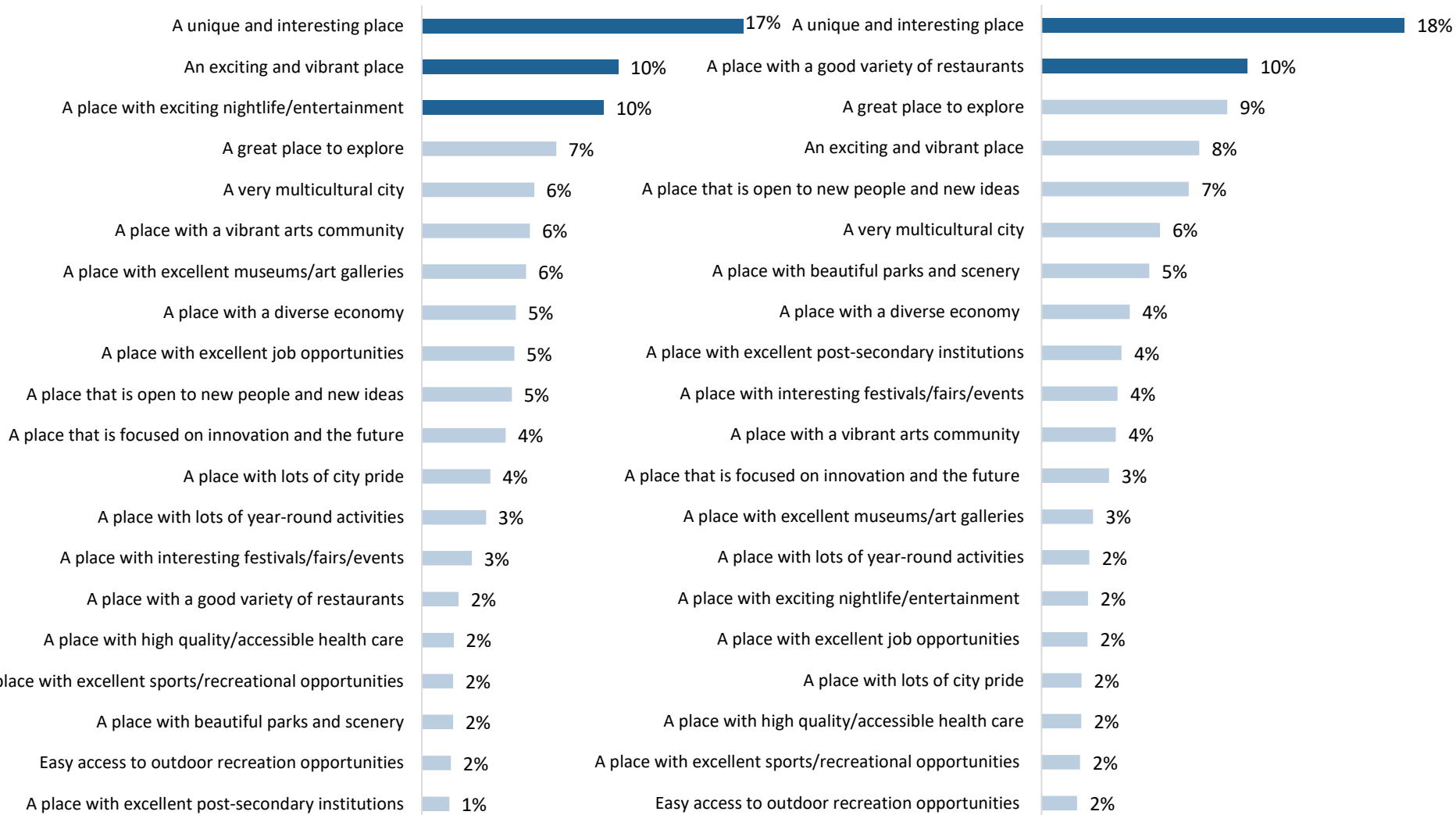
Basic Quality Drivers: What drivers influence basic qualities of Edmonton (safety, peaceful, cleanliness, etc.)



Lifestyle Drivers: What drivers influence Edmonton’s lifestyle (multicultural, restaurant, etc.)

Move to Edmonton to Live
(n=3,013)

Visit Edmonton
(n=3,017)

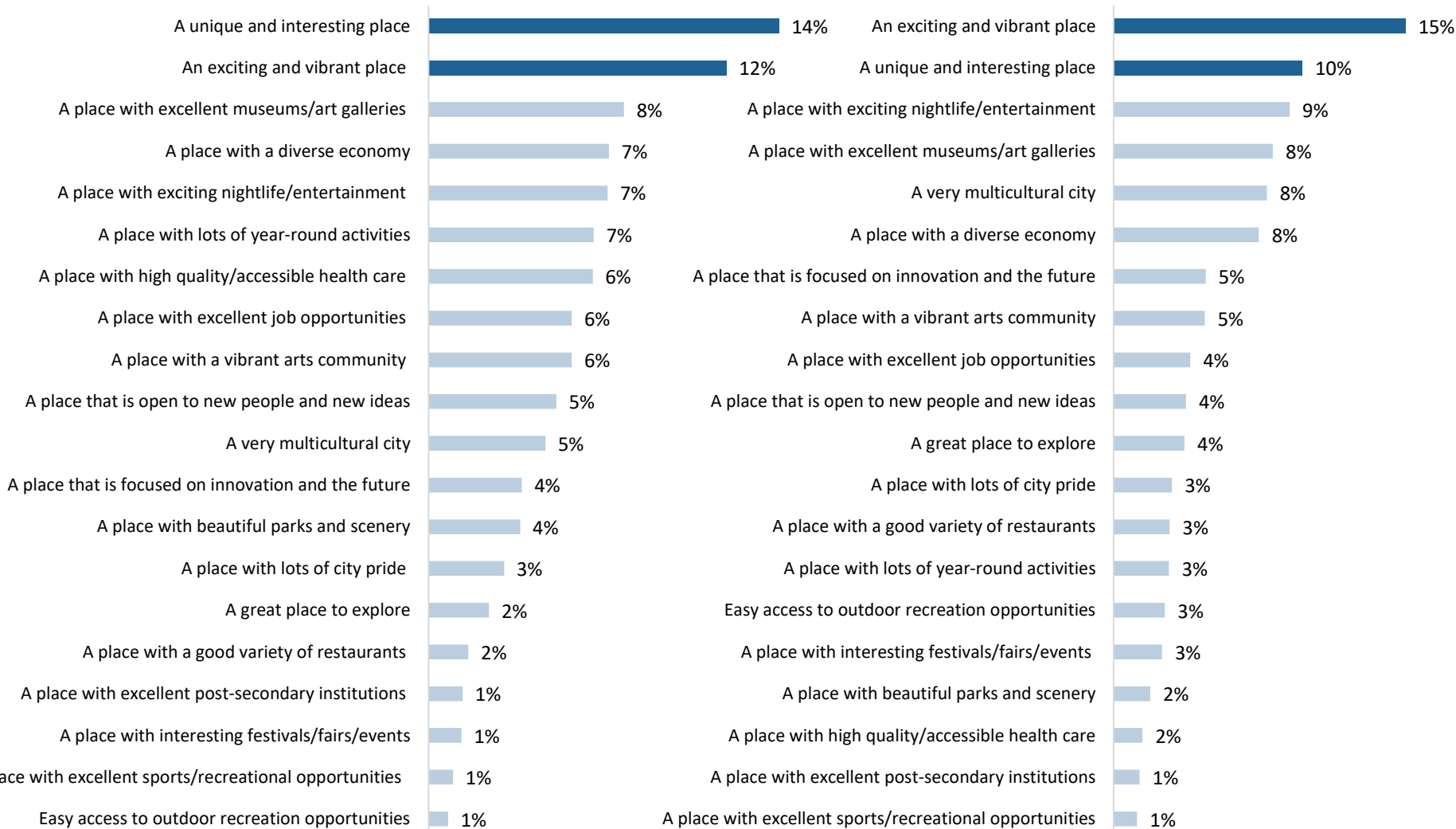


Base: Urban Canadians who provided an opinion about Edmonton
Q.14 - Based on your perceptions of the City of Edmonton, please indicate how likely you are to...

Lifestyle Drivers: What drivers influence Edmonton’s lifestyle (multicultural, restaurant, etc.) continued

Move to Edmonton to Study
(n=3,004)

Open a Business in Edmonton
(n=3,449)



Base: Urban Canadians who provided an opinion about Edmonton
Q.14 - Based on your perceptions of the City of Edmonton, please indicate how likely you are to...

Over one-quarter (26%) of Urban Canadians (excluding Edmontonians) indicate being familiar with Edmonton.



Don't know/prefer not to answer
 Unfamiliar (not very, not at all)
 Neither familiar not unfamiliar
 Familiar (somewhat, very)

Know a lot mentions- Longwood International study:
 2013 – 25%
 2008 – 22%

Urban Canadians (excluding Edmontonians) Familiarity with Edmonton

	City	Excluding Edmonton	
	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3118	1058	2008
Familiar (somewhat, very)	26%	100%	-
Neither familiar not unfamiliar	17%	-	23%
Unfamiliar (not very, not at all)	55%	-	77%
Don't know/prefer not to answer	2%	-	-

PROFILE OF URBAN CANADIAN RESPONDENTS

RESPONDENT PROFILE

		City		Excluding Edmonton	
	Total	Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Gender					
Male	48%	50%	48%	57%	45%
Female	52%	50%	52%	43%	55%
Other	<1%	-	<1%	<1%	<1%
City					
Toronto	25%	-	27%	21%	30%
Montreal	15%	-	17%	5%	20%
Calgary	11%	-	12%	29%	6%
Ottawa	8%	-	9%	7%	10%
Edmonton	8%	100%	-	-	-
Winnipeg	6%	-	7%	9%	6%
Vancouver	6%	-	6%	8%	6%
Hamilton	5%	-	5%	3%	6%
Quebec City	5%	-	5%	1%	7%
Halifax	4%	-	4%	3%	4%
Saskatoon	2%	-	2%	5%	1%
Regina	2%	-	2%	4%	1%
St. John's	1%	-	1%	1%	1%
Victoria	1%	-	1%	1%	1%
Fredericton	1%	-	1%	1%	1%
Tenure in City					
Less than 1 year	2%	1%	2%	1%	2%
1 year to less than 3 years	5%	6%	5%	5%	5%
3 years to less than 5 years	5%	5%	5%	5%	5%
5 years to less than 10 years	8%	10%	8%	13%	7%
10 years to less than 20 years	17%	16%	17%	20%	15%
20 years and more	63%	61%	63%	56%	65%
Don't know	<1%	<1%	<1%	-	<1%

RESPONDENT PROFILE

	Total	City		Excluding Edmonton	
		Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Age					
(Net) 18-34	30%	33%	29%	29%	29%
18 to 24 years	9%	12%	9%	7%	10%
25 to 34 years	20%	22%	20%	22%	20%
(Net) 35-54	35%	35%	35%	35%	36%
35 to 44 years	17%	17%	17%	17%	16%
45 to 54 years	19%	19%	19%	18%	20%
(Net) 55+	35%	31%	35%	36%	35%
55 to 64 years	16%	14%	16%	14%	17%
65 years of age or older	19%	17%	19%	21%	19%
Education					
Elementary (7 years or less)	<1%	<1%	<1%	<1%	<1%
High school, general or vocational (8 to 12 years)	19%	21%	18%	13%	20%
College (pre-university, technical training, certificate, accreditation or advanced diploma (13-15 years))	26%	27%	26%	26%	26%
University certificates and diplomas	7%	9%	7%	8%	6%
University Bachelor (including classical studies)	32%	28%	32%	33%	33%
University Master's degree	12%	12%	12%	13%	12%
University Doctorate (PhD)	2%	2%	2%	4%	2%
I prefer not to answer	1%	1%	1%	1%	1%

RESPONDENT PROFILE

		City		Excluding Edmonton	
	Total	Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Children in Household (Net) Yes	27%	28%	27%	30%	25%
Yes: 12 years of age and OLDER ONLY	8%	6%	8%	8%	8%
Yes: 12 years of age and older AND younger than 12 years old	5%	5%	5%	9%	4%
Yes: YOUNGER than 12 years old ONLY	13%	17%	13%	13%	13%
No children under 18 years old at all in the household	71%	70%	72%	68%	73%
I prefer not to answer	2%	3%	2%	2%	1%
Marital Status					
Single	29%	29%	29%	27%	30%
Married/living in common law	57%	59%	57%	62%	55%
Widowed	3%	3%	3%	2%	4%
Separated	2%	1%	2%	3%	2%
Divorced	7%	7%	7%	5%	8%
I prefer not to answer	1%	1%	1%	1%	1%
Language First Learned					
French	18%	4%	19%	5%	24%
English	59%	78%	57%	71%	53%
Other	7%	5%	7%	6%	8%
English and French	4%	3%	5%	6%	4%
French and other	<1%	-	<1%	<1%	<1%
English and other	9%	7%	9%	9%	9%
Other and other	1%	2%	1%	1%	2%
I prefer not to answer	1%	<1%	1%	1%	<1%

RESPONDENT PROFILE

		City		Excluding Edmonton	
	Total	Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Employment Status					
Working full time	49%	46%	49%	52%	48%
Working part time	11%	11%	11%	13%	11%
A student	6%	8%	6%	4%	7%
Not working outside the home	5%	8%	5%	5%	5%
Retired	24%	22%	24%	23%	25%
Other	3%	4%	3%	3%	3%
I prefer not to answer	2%	1%	2%	1%	1%
Occupation					
Office worker	14%	12%	14%	12%	15%
Personnel specialized in sales	3%	3%	3%	4%	3%
Personnel specialized in services	4%	5%	4%	5%	4%
Manual workers	3%	3%	3%	4%	2%
Skilled, semi-skilled workers	4%	5%	4%	5%	4%
Science and technologies workers	5%	4%	5%	7%	5%
Professionals	17%	16%	17%	18%	17%
Managers/administrators/owners	7%	7%	7%	10%	6%
Homemaker	3%	4%	3%	2%	4%
Student	6%	9%	6%	3%	6%
Retired	23%	20%	23%	22%	24%
Unemployed	3%	4%	3%	3%	3%
Other	5%	5%	5%	4%	5%
I prefer not to answer	2%	2%	2%	2%	2%

RESPONDENT PROFILE

		City		Excluding Edmonton	
	Total	Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	3619	501	3118	1058	2008
Average Annual Household Income					
\$19,999 or less	7%	5%	7%	6%	7%
Between \$20,000 and \$39,999	12%	12%	12%	11%	12%
Between \$40,000 and \$59,999	15%	13%	15%	13%	15%
Between \$60,000 and \$79,999	14%	12%	14%	14%	14%
Between \$80,000 and \$99,999	14%	12%	14%	14%	15%
Between \$100,000 and \$124,999	12%	11%	12%	14%	12%
Between \$125,000 and \$149,999	7%	8%	7%	10%	6%
\$150,000 or more	9%	13%	8%	10%	8%
I prefer not to answer	10%	13%	10%	8%	11%
Member of a Visible Minority					
Yes	20%	18%	20%	21%	20%
No	77%	77%	77%	77%	77%
I prefer not to answer	3%	5%	3%	3%	3%
Person with a Disability					
Yes	10%	12%	10%	10%	10%
No	88%	86%	88%	88%	89%
I prefer not to answer	2%	2%	2%	2%	2%
Born in Canada					
Yes	77%	82%	77%	77%	77%
No	22%	17%	22%	22%	23%
I prefer not to answer	1%	1%	1%	1%	<1%

RESPONDENT PROFILE

Respondents not born in Canada	City			Excluding Edmonton	
	Total	Edmonton	Excl. Edmonton	Familiar with Edmonton	Unfamiliar with Edmonton
n=	638	83	555	185	360
Country Born					
UK	11%	7%	11%	10%	11%
China	8%	9%	8%	6%	9%
India	7%	9%	7%	7%	7%
Hong Kong	7%	3%	7%	9%	7%
United States of America	5%	6%	4%	4%	5%
Philippines	4%	14%	4%	5%	3%
Russia	3%	4%	3%	2%	4%
Pakistan	3%	3%	3%	10%	1%
France	3%	-	3%	3%	3%
Nigeria	2%	3%	2%	1%	3%
Columbia	2%	-	2%	1%	3%
Netherlands	2%	-	2%	7%	1%
Brazil	2%	1%	2%	4%	2%
Italy	2%	1%	2%	<1%	3%
South Africa	2%	1%	2%	2%	2%
Germany	2%	3%	2%	1%	2%
Vietnam	2%	3%	2%	2%	2%
Jamaica	2%	-	2%	-	2%
Poland	1%	6%	1%	-	1%
Serbia	1%	-	1%	-	2%
Taiwan	1%	-	1%	1%	1%
Czech Republic	1%	-	1%	1%	1%
Ukraine	1%	3%	1%	<1%	1%
South Korea	1%	4%	<1%	-	<1%
Ghana	<1%	1%	<1%	1%	<1%
Singapore	<1%	1%	<1%	<1%	<1%
Iran	<1%	1%	<1%	1%	<1%
Kenya	<1%	2%	<1%	<1%	<1%
Other	20%	15%	20%	16%	21%
Don't know/Prefer not to answer	4%	1%	5%	4%	5%

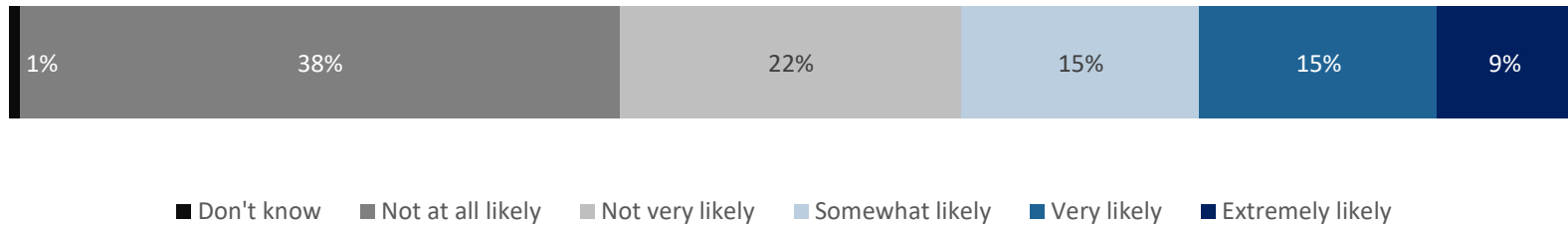


APPENDIX C

CANADIAN BUSINESS OWNERS AND EXECUTIVES SURVEY RESULTS

EXPANSION CRITERIA

One-quarter (24%) of Canadian business respondents indicate they would be either very or extremely likely to expand their business operations in Canada within the next 5 years.



Likelihood to Expand Business Operations in Canada

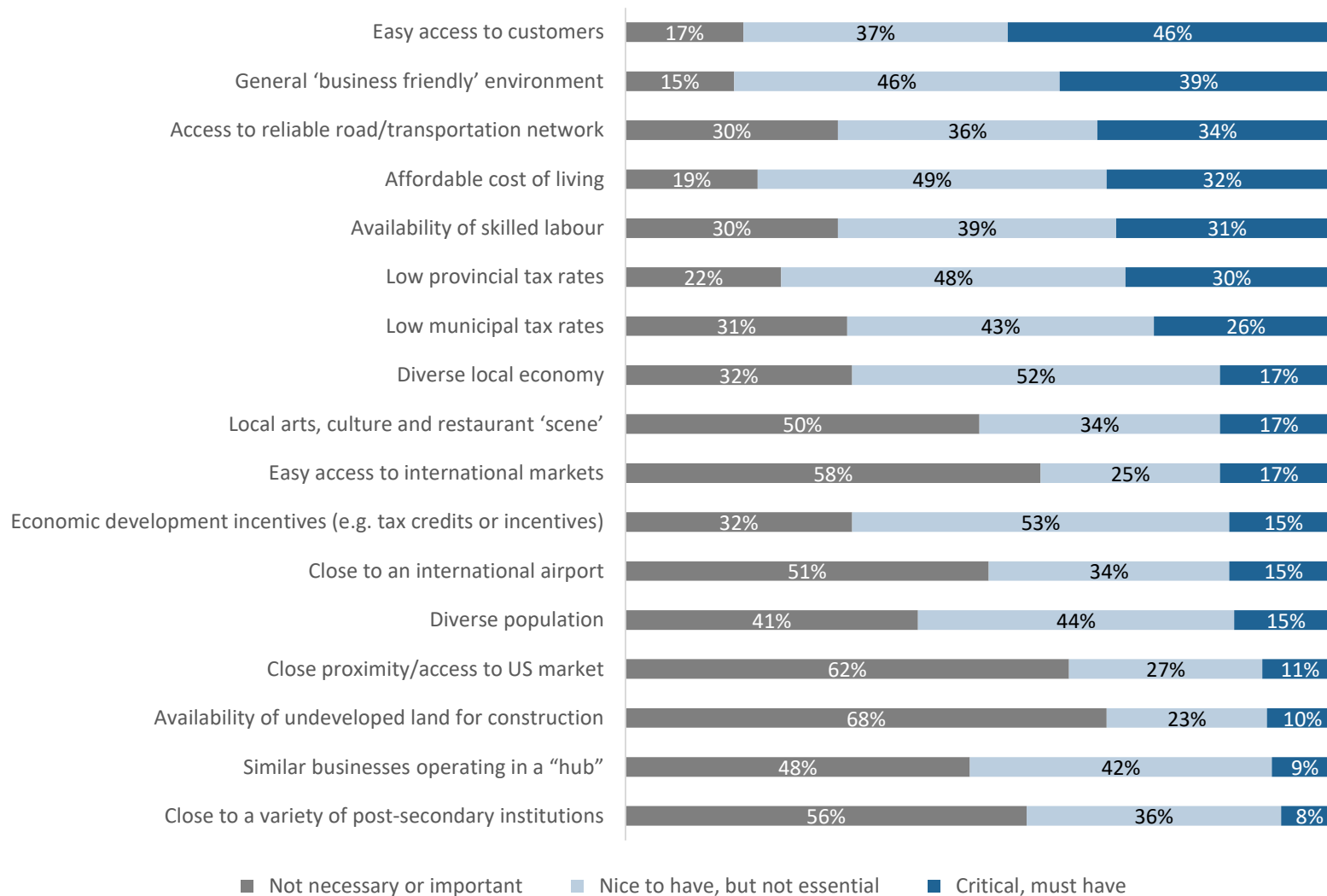
	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Extremely likely	9%	11%	7%	9%	6%	17%	-
Very likely	15%	20%	11%	9%	56%	33%	-
Somewhat likely	15%	13%	18%	14%	19%	17%	50%
Not very likely	22%	23%	19%	22%	13%	33%	50%
Not at all likely	38%	33%	43%	45%	6%	-	-
Don't know	1%	-	1%	1%	-	-	-
Likely (extremely, likely)	24%	31%	18%	18%	63%	50%	-
Unlikely (not very, not at all)	60%	56%	63%	67%	19%	33%	50%

Base: Canadian business respondents

*Caution to be used when interpreting results due to small sample size

E1 - This survey is about expanding or growing your business' operations in Canada. How likely is it that your business will expand its operations in Canada in the next five years? This would include physically locating some of those operations in another City or province.

Canadian business respondents feel that easy access to customers is the most critical aspect driving their decision about where to locate or expand their business operations, followed by a general ‘business friendly’ environment.



Base: Canadian business respondents (n=151)

E2 - In terms of driving the decision about where to locate or expand your business' operations, how important are each of the following characteristics when considering locations?

Critical Aspects Driving Business Decisions to Locate or Expand Business Operations

Critical mentions	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HG not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Easy access to customers	46%	47%	46%	45%	56%	67%	-
General 'business friendly' environment	39%	40%	39%	35%	44%	100%	50%
Access to reliable road/transportation network	34%	33%	35%	34%	19%	67%	50%
Affordable cost of living	32%	29%	35%	35%	19%	17%	-
Availability of skilled labour	31%	37%	26%	28%	38%	100%	-
Low provincial tax rates	30%	33%	28%	29%	38%	17%	50%
Low municipal tax rates	26%	27%	26%	24%	38%	33%	50%
Easy access to international markets	17%	21%	13%	14%	31%	17%	50%
Local arts, culture and restaurant 'scene'	17%	20%	13%	17%	25%	-	-
Diverse local economy	17%	21%	13%	16%	19%	33%	-
Close to an international airport	15%	16%	15%	12%	31%	33%	50%
Economic development incentives (e.g. tax credits or incentives)	15%	15%	17%	16%	19%	-	-
Diverse population	15%	20%	8%	12%	31%	33%	-
Close proximity/access to US market	11%	9%	13%	7%	31%	33%	-
Availability of undeveloped land for construction	10%	13%	7%	10%	13%	-	-
Similar businesses operating in a "hub"	9%	8%	11%	9%	13%	-	-
Close to a variety of post-secondary institutions	8%	9%	7%	9%	6%	-	-

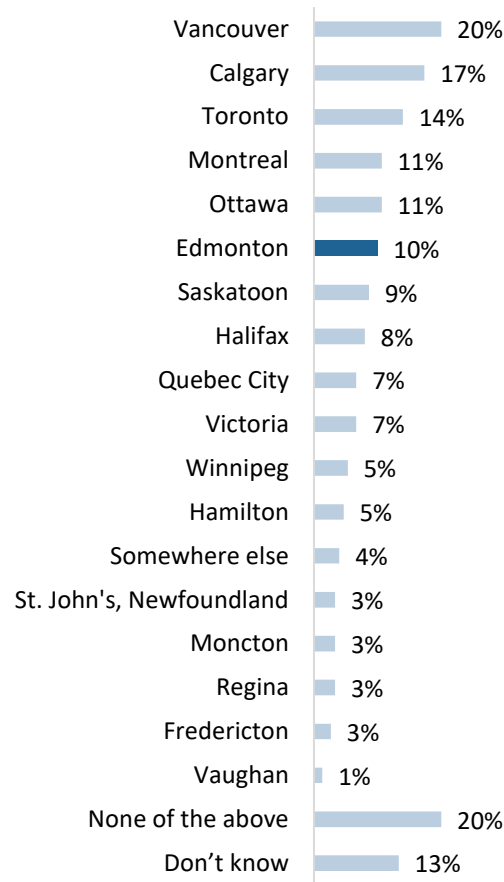
% is significantly higher than % (within segment grouping)

Base: Canadian business respondents

*Caution to be used when interpreting results due to small sample size

E2 - In terms of driving the decision about where to locate or expand your business' operations, how important are each of the following characteristics when considering locations?

Canadian business respondents are most likely to consider expanding their operations into Vancouver, Calgary, or Toronto. One-in-ten (10%) mention Edmonton, placing it sixth after Ottawa.



Canadian Cities Most Likely to Consider Expanding Operations

	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HG not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Vancouver	20%	23%	15%	20%	31%	-	-
Calgary	17%	21%	13%	15%	38%	-	50%
Toronto	14%	20%	7%	14%	19%	-	-
Montreal	11%	13%	8%	9%	25%	-	-
Ottawa	11%	7%	15%	11%	13%	-	-
Edmonton	10%	13%	7%	8%	19%	17%	50%
Saskatoon	9%	12%	6%	9%	6%	17%	-
Halifax	8%	8%	8%	9%	-	-	-
Quebec City	7%	7%	7%	6%	-	50%	-
Victoria	7%	7%	7%	7%	6%	-	-
Winnipeg	5%	7%	4%	5%	13%	-	-
Hamilton	5%	4%	6%	5%	-	17%	-
Somewhere else	4%	5%	3%	5%	-	-	-
St. John's, Newfoundland	3%	3%	4%	2%	6%	17%	-
Moncton	3%	5%	1%	2%	13%	-	-
Regina	3%	5%	1%	3%	-	17%	-
Fredericton	3%	4%	1%	2%	6%	17%	-
Vaughan	1%	3%	-	2%	-	-	-
None of the above	20%	11%	28%	20%	13%	33%	50%
Don't know	13%	13%	14%	14%	6%	17%	-

% is significantly higher than % (within segment grouping)

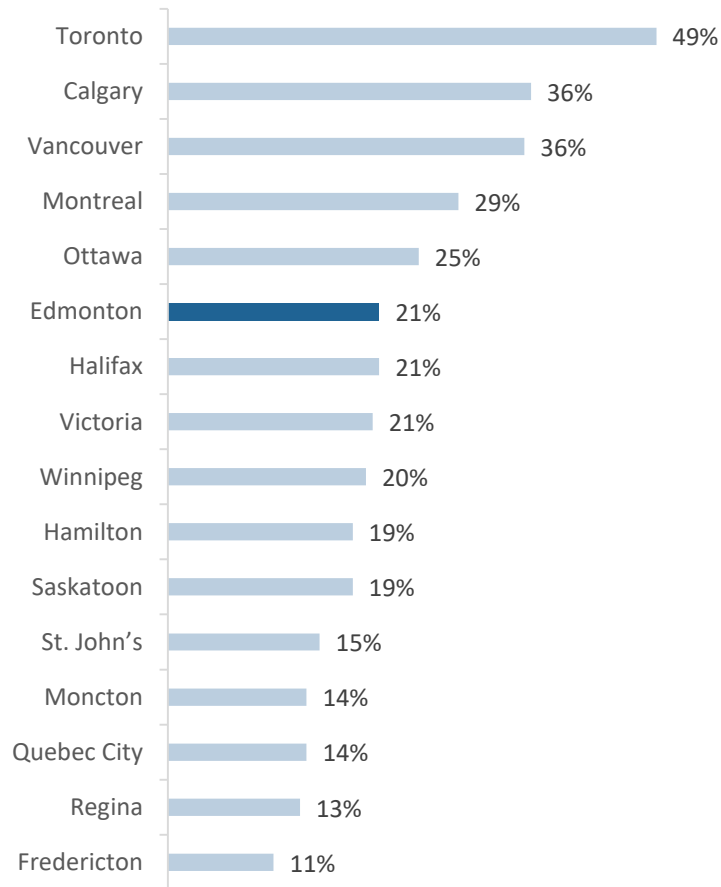
Base: Canadian business respondents (n=151)

*Caution to be used when interpreting results due to small sample size

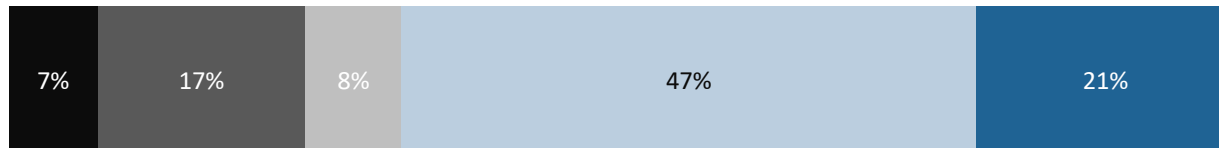
E3 - If you were to expand your operations in the next few years, which of the following Canadian cities would you most consider expanding into?

KEY MEASURES

Toronto garners the greatest proportion of positive impression ratings (8-10 ratings), from a business point of view. While one-in-five (21%) Canadian business respondents indicate having positive impressions of Edmonton, placing it sixth behind Ottawa.



Nearly half (47%) of Canadian business respondents indicate having a neutral impression (4-7 rating) of Edmonton, followed by one-in-five (21%) who cite having a positive impression (8-10 rating) of the city.



Don't know of it at all
 Don't know it well enough
 Negative (1-3)
 Neutral (4-7)
 Positive (8-10)

Positive Impressions (8-10 ratings)

	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Toronto	49%	51%	47%	48%	63%	50%	-
Calgary	36%	48%	25%	33%	63%	50%	-
Vancouver	36%	45%	25%	33%	56%	50%	-
Montreal	29%	35%	24%	24%	63%	50%	-
Ottawa	25%	29%	21%	23%	44%	33%	-
Edmonton	21%	31%	13%	19%	38%	33%	-
Halifax	21%	25%	18%	19%	44%	17%	-
Victoria	21%	28%	14%	20%	25%	17%	-
Winnipeg	20%	27%	14%	17%	38%	50%	-
Hamilton	19%	24%	14%	16%	31%	50%	-
Saskatoon	19%	27%	11%	18%	25%	17%	-
St. John's	15%	23%	8%	15%	13%	33%	-
Moncton	14%	20%	8%	12%	31%	17%	-
Quebec City	14%	15%	14%	10%	38%	33%	-
Regina	13%	19%	8%	13%	19%	17%	-
Fredericton	11%	16%	6%	8%	31%	17%	-

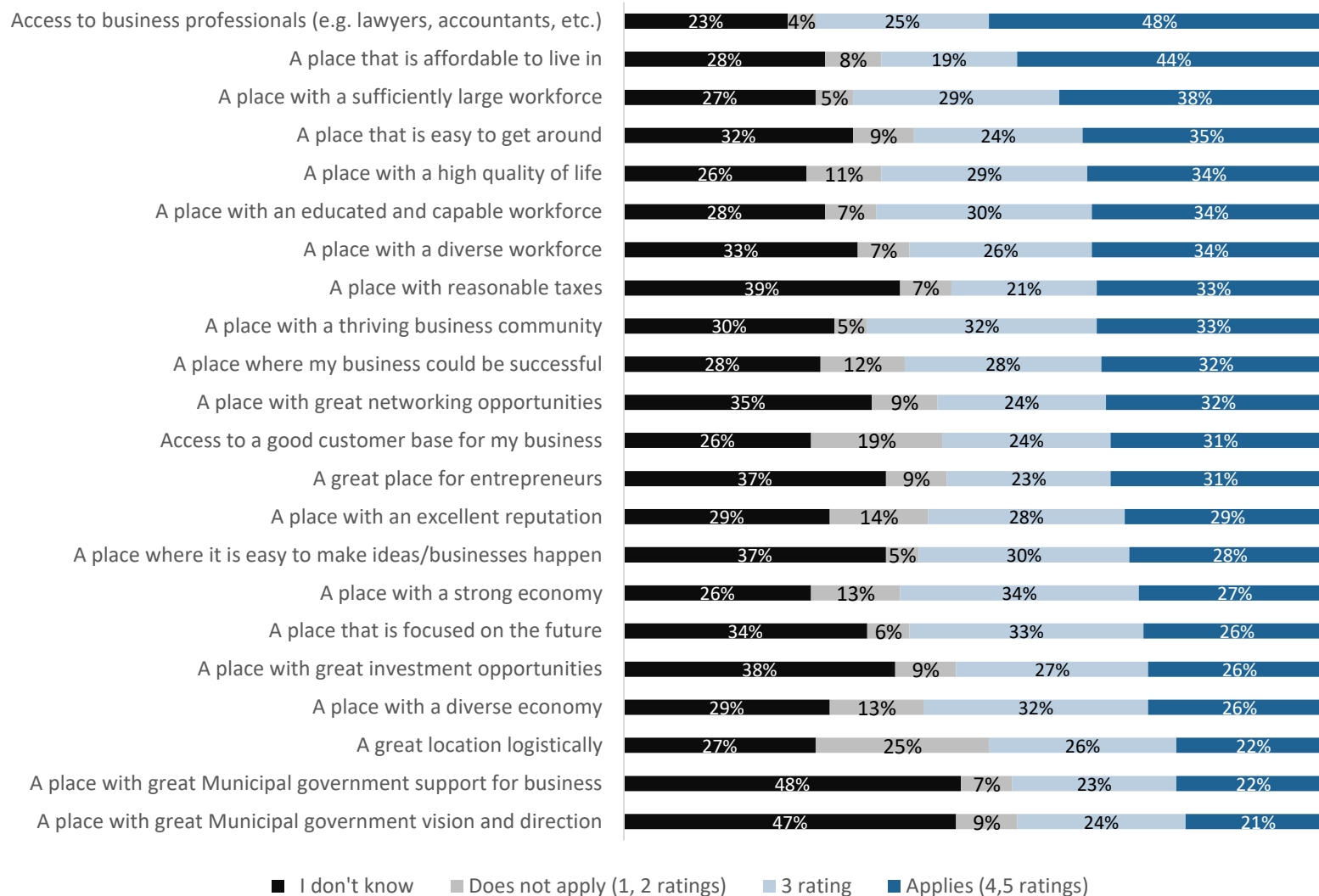
% is significantly higher than % (within segment grouping)

Base: Canadian business respondents

*Caution to be used when interpreting results due to small sample size

K1 - For each of the following Canadian cities, please rate your overall impression from a business viewpoint, on a scale from 1 to 10...Edmonton

Canadian business respondents cite that access to business professionals, followed by a place that is affordable to live in, are the statements which most apply to Edmonton.



Summary of Statements that Apply (4, 5 rating) to Edmonton

Applies (4, 5 ratings)	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HG not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Access to business professionals (e.g. lawyers, accountants, etc.)	48%	60%	39%	50%	44%	33%	50%
A place that is affordable to live in	44%	56%	35%	43%	63%	33%	50%
A place with a sufficiently large workforce	38%	56%	22%	38%	44%	33%	50%
A place that is easy to get around	35%	56%	15%	36%	25%	33%	50%
A place with a high quality of life	34%	51%	19%	35%	31%	33%	50%
A place with a diverse workforce	34%	48%	21%	34%	44%	17%	-
A place with an educated and capable workforce	34%	45%	24%	35%	31%	17%	50%
A place with a thriving business community	33%	45%	22%	29%	56%	50%	50%
A place with reasonable taxes	33%	51%	17%	32%	44%	33%	-
A place where my business could be successful	32%	40%	26%	31%	38%	33%	50%
A place with great networking opportunities	32%	41%	24%	30%	44%	33%	50%
A great place for entrepreneurs	31%	43%	21%	28%	50%	33%	50%
Access to a good customer base for my business	31%	41%	22%	31%	19%	50%	50%
A place with an excellent reputation	29%	43%	17%	28%	44%	33%	-
A place where it is easy to make ideas/businesses happen	28%	40%	18%	28%	31%	33%	50%
A place with a strong economy	27%	36%	19%	26%	31%	33%	50%
A place that is focused on the future	26%	39%	15%	26%	31%	33%	-
A place with great investment opportunities	26%	36%	17%	24%	31%	33%	50%
A place with a diverse economy	26%	36%	17%	27%	31%	-	-
A place with great Municipal government support for business	22%	32%	13%	22%	25%	17%	-
A great location logistically	22%	29%	15%	20%	31%	33%	50%
A place with great Municipal government vision and direction	21%	32%	10%	20%	25%	17%	-

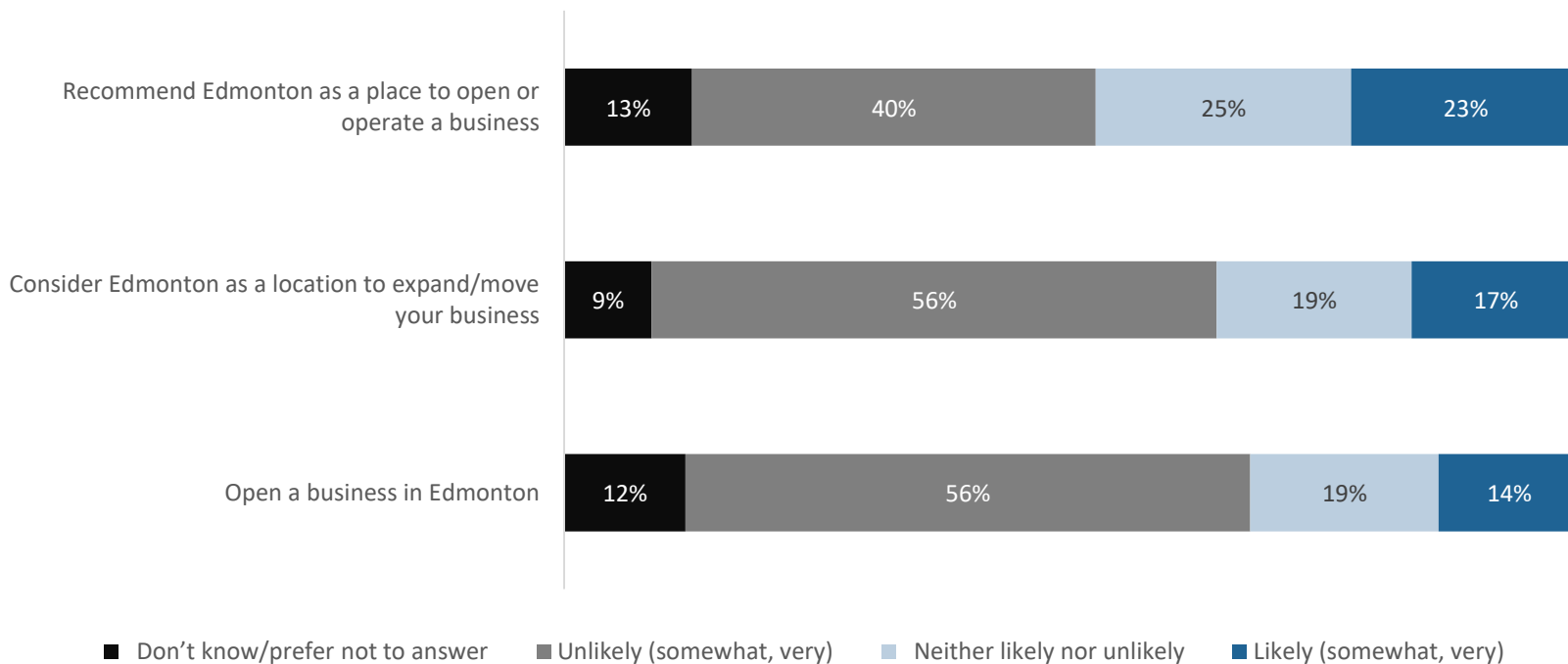
% is significantly higher than % (within segment grouping)

Base: Canadian business respondents

*Caution to be used when interpreting results due to small sample size

K2 - Thinking now about just "Edmonton". For each of the following statements, please rate each city on a scale from 1 to 5 where 1 means the statement does not apply to that city.

Nearly one-quarter (23%) of Canadian business respondents would be likely (somewhat, very) to recommend Edmonton as a place to open or operate a business. However, less than one-in-five indicate they would be likely to consider Edmonton as a location to expand/move their business (17%), and/or open a business (14%).



Likelihood of Canadian Business Respondents to...

Likely (somewhat, very)	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Recommend Edmonton as a place to open or operate a business	23%	31%	15%	20%	25%	50%	50%
Consider Edmonton as a location to expand/move your business	17%	25%	8%	13%	25%	50%	50%
Open a business in Edmonton	14%	23%	6%	10%	31%	33%	50%

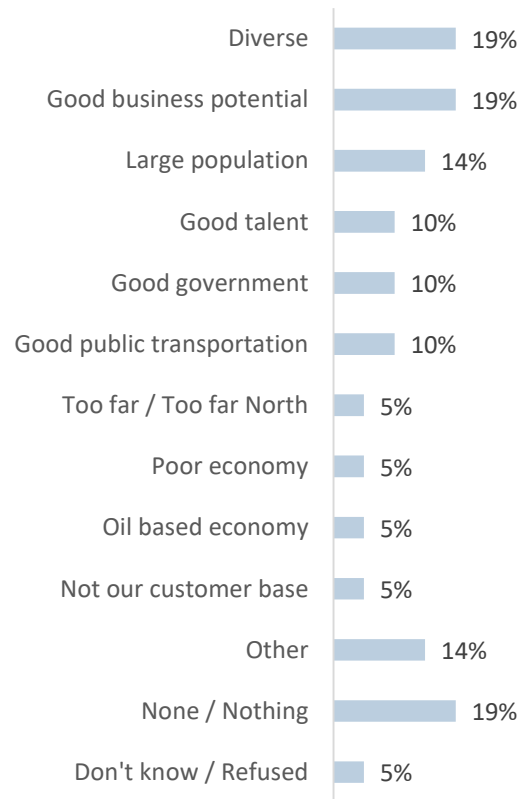
% is significantly higher than % (within segment grouping)

Base: Canadian business respondents

*Caution to be used when interpreting results due to small sample size

K3 - Based on your what you may have heard, read or know about the City of Edmonton, please indicate how likely you are to...

Canadian business respondents who are somewhat or very likely to open a business in Edmonton, indicate the diversity of the city and having good business potential as the main reasons for their intention.



Base: Canadian business respondents who are somewhat, very likely to open a business in Edmonton (n=21)*

*Caution when interpreting results due to small sample size

K4 - Why are you "very/somewhat likely" to open a business in Edmonton?

Reasons for Being Somewhat, Very Likely to Open a Business in Edmonton

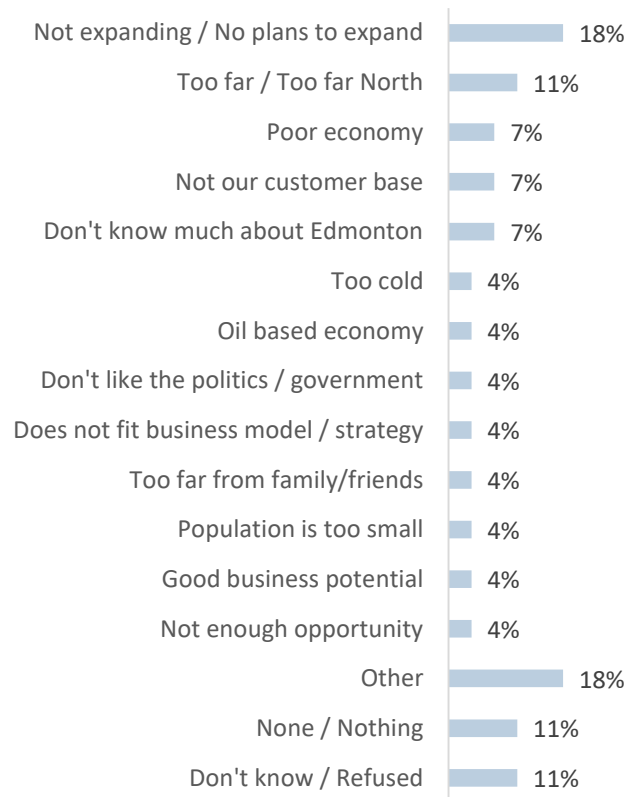
	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HG not in Canada	Other
n=	21*	17*	4*	13*	5*	2*	1*
Diverse	19%	24%	-	23%	-	50%	-
Good business potential	19%	24%	-	15%	40%	-	-
Large population	14%	18%	-	23%	-	-	-
Good talent	10%	12%	-	8%	20%	-	-
Good government	10%	6%	25%	-	-	50%	100%
Good public transportation	10%	12%	-	8%	-	50%	-
Too far / Too far North	5%	6%	-	8%	-	-	-
Poor economy	5%	-	25%	8%	-	-	-
Oil based economy	5%	6%	-	-	20%	-	-
Not our customer base	5%	6%	-	8%	-	-	-
Other	14%	12%	25%	23%	-	-	-
None / Nothing	19%	18%	25%	15%	20%	50%	-
Don't know / Refused	5%	6%	-	8%	-	-	-

Base: Canadian business respondents who are somewhat, very likely to open a business in Edmonton

*Caution when interpreting results due to small sample size

K4 - Why are you "very/somewhat likely" to open a business in Edmonton?

Canadian business respondents who are neither likely nor unlikely to open a business in Edmonton, indicate not having plans to expand as the main reason for their intention.



Base: Canadian business respondents who are neither likely nor unlikely to open a business in Edmonton (n=28)*

*Caution when interpreting results due to small sample size

K4 - Why are you "neither likely not unlikely" to open a business in Edmonton?

Reasons for Being Neither Likely nor Unlikely to Open a Business in Edmonton

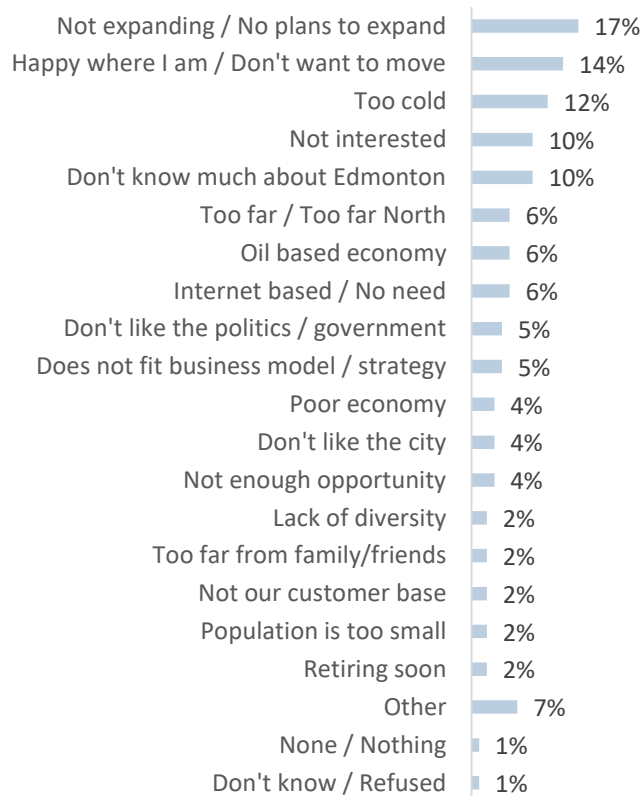
	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HG not in Canada	Other
n=	28*	11*	17*	25*	3*	-	-
Not expanding / No plans to expand	18%	27%	12%	20%	-	-	-
Too far / Too far North	11%	-	18%	12%	-	-	-
Poor economy	7%	18%	-	8%	-	-	-
Not our customer base	7%	9%	6%	8%	-	-	-
Don't know much about Edmonton	7%	9%	6%	8%	-	-	-
Too cold	4%	-	6%	4%	-	-	-
Oil based economy	4%	9%	-	4%	-	-	-
Don't like the politics / government	4%	9%	-	4%	-	-	-
Does not fit business model / strategy	4%	9%	-	4%	-	-	-
Too far from family/friends	4%	9%	-	4%	-	-	-
Population is too small	4%	-	6%	4%	-	-	-
Good business potential	4%	-	6%	4%	-	-	-
Not enough opportunity	4%	9%	-	4%	-	-	-
Other	18%	27%	12%	16%	33%	-	-
None / Nothing	11%	-	18%	8%	33%	-	-
Don't know / Refused	11%	-	18%	8%	33%	-	-

Base: Canadian business respondents who are neither likely nor unlikely to open a business in Edmonton

*Caution when interpreting results due to small sample size

K4 - Why are you "neither likely nor unlikely" to open a business in Edmonton?

Canadian business respondents who are somewhat, very unlikely to open a business in Edmonton, indicate not having plans to expand as the main reason for their intention, followed by being happy where they are and/or not wanting to move.



Reasons for Being Somewhat, Very Unlikely to Open a Business in Edmonton

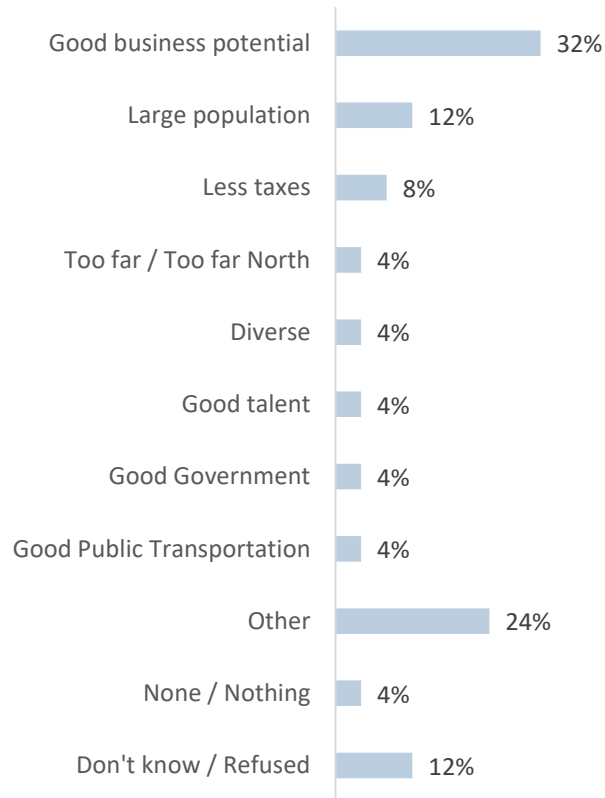
	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HG not in Canada	Other
n=	84	44	40	73	8*	3*	-
Not expanding / No plans to expand	17%	23%	10%	19%	-	-	-
Happy where I am / Don't want to move	14%	9%	20%	15%	13%	-	-
Too cold	12%	16%	8%	10%	38%	-	-
Not interested	10%	7%	13%	10%	13%	-	-
Don't know much about Edmonton	10%	2%	18%	10%	13%	-	-
Too far / Too far North	6%	5%	8%	5%	-	33%	-
Oil based economy	6%	11%	-	7%	-	-	-
Internet based / No need	6%	7%	5%	4%	25%	-	-
Don't like the politics / government	5%	7%	3%	3%	25%	-	-
Does not fit business model / strategy	5%	5%	5%	5%	-	-	-
Poor economy	4%	5%	3%	3%	-	33%	-
Don't like the city	4%	2%	5%	4%	-	-	-
Not enough opportunity	4%	5%	3%	4%	-	-	-
Lack of diversity	2%	5%	-	1%	13%	-	-
Too far from family/friends	2%	-	5%	3%	-	-	-
Not our customer base	2%	5%	-	3%	-	-	-
Population is too small	2%	5%	-	1%	-	33%	-
Retiring soon	2%	2%	3%	3%	-	-	-
Other	7%	9%	5%	7%	13%	-	-
None / Nothing	1%	2%	-	1%	-	-	-
Don't know / Refused	1%	2%	-	1%	-	-	-

Base: Canadian business respondents who are somewhat, very unlikely to open a business in Edmonton

*Caution to be used when interpreting results due to small sample size

K4 - Why are you "somewhat/very unlikely" to open a business in Edmonton?

Canadian business respondents who are somewhat or very likely to consider expanding/moving their business to Edmonton, feel that Edmonton has good business potential.



Base: Canadian business respondents who are somewhat, very likely to consider expanding/moving business to Edmonton (n=25)*

*Caution when interpreting results due to small sample size

K5 - Why are you "very/somewhat likely" to consider Edmonton as a location to expand/move your business?

Reasons for Being Somewhat, Very Likely to Consider Expanding/Moving Business to Edmonton

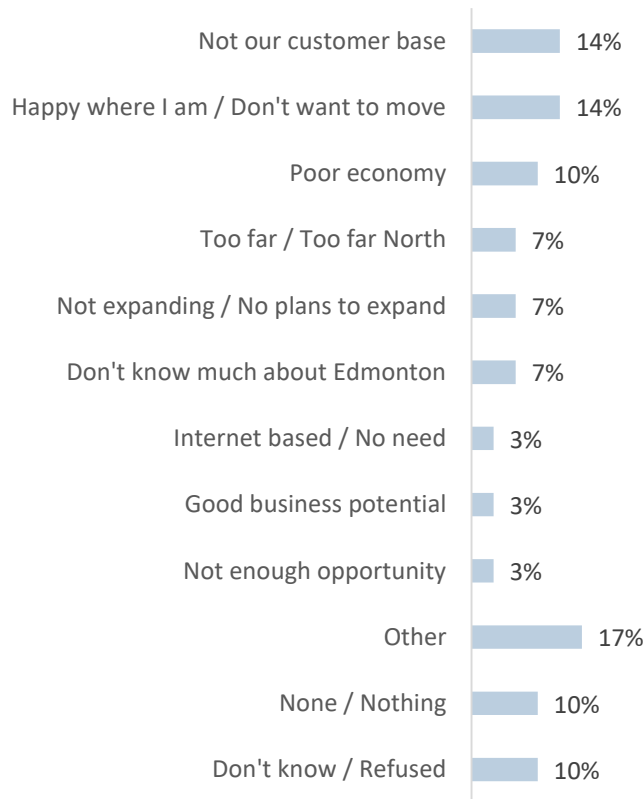
	Familiarity		Company Description				
	Total	Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	25*	19*	6*	17*	4*	3*	1*
Good business potential	32%	26%	50%	35%	50%	-	-
Large population	12%	11%	17%	12%	25%	-	-
Less taxes	8%	-	33%	6%	-	33%	-
Too far / Too far North	4%	5%	-	6%	-	-	-
Diverse	4%	5%	-	6%	-	-	-
Good talent	4%	5%	-	6%	-	-	-
Good Government	4%	5%	-	6%	-	-	-
Good Public Transportation	4%	5%	-	6%	-	-	-
Other	24%	26%	17%	18%	25%	33%	100%
None / Nothing	4%	5%	-	6%	-	-	-
Don't know / Refused	12%	16%	-	12%	-	33%	-

Base: Canadian business respondents who are somewhat, very likely to consider expanding/moving business to Edmonton

*Caution when interpreting results due to small sample size

K5 - Why are you "very/somewhat likely" to consider Edmonton as a location to expand/move your business?

Canadian business respondents who are neither likely nor unlikely to consider expanding/moving their business to Edmonton, feel that Edmonton is not their customer base, or are simply happy where they are and/or don't want to move.



Base: Canadian business respondents who are neither likely nor unlikely to consider expanding/moving business to Edmonton (n=29)*

*Caution when interpreting results due to small sample size

K5 - Why are you "neither likely nor unlikely" to consider Edmonton as a location to expand/move your business?

Reasons for Being Neither Likely nor Unlikely to Consider Expanding/Moving Business to Edmonton

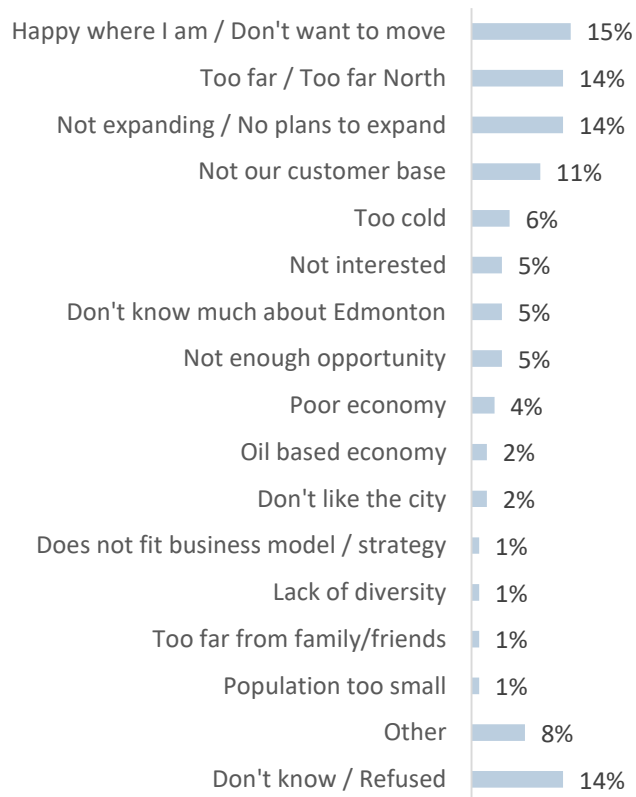
	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	29*	13*	16*	24*	5*	-	-
Not our customer base	14%	15%	13%	17%	-	-	-
Happy where I am / Don't want to move	14%	23%	6%	17%	-	-	-
Poor economy	10%	8%	13%	13%	-	-	-
Too far / Too far North	7%	-	13%	4%	20%	-	-
Not expanding / No plans to expand	7%	15%	-	8%	-	-	-
Don't know much about Edmonton	7%	8%	6%	8%	-	-	-
Internet based / No need	3%	-	6%	4%	-	-	-
Good business potential	3%	-	6%	4%	-	-	-
Not enough opportunity	3%	-	6%	-	20%	-	-
Other	17%	31%	6%	17%	20%	-	-
None / Nothing	10%	8%	13%	4%	40%	-	-
Don't know / Refused	10%	8%	13%	13%	-	-	-

Base: Canadian business respondents who are neither likely nor unlikely to consider expanding/moving business to Edmonton

*Caution when interpreting results due to small sample size

K5 - Why are you "neither likely nor unlikely" to consider Edmonton as a location to expand/move your business?

Canadian business respondents who are somewhat, very unlikely to consider expanding/moving their business to Edmonton, feel that they are simply happy where they are and/or don't want to move, that Edmonton is too far/too far North, or that they do not have plans to expand.



Reasons for Being Somewhat, Very Unlikely to Consider Expanding/Moving Business to Edmonton

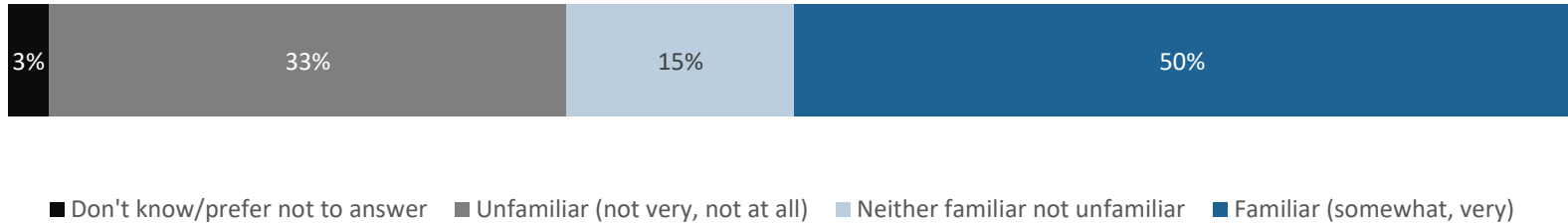
	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	84	42	42	74	7*	3*	-
Happy where I am / Don't want to move	15%	10%	21%	16%	14%	-	-
Too far / Too far North	14%	12%	17%	15%	-	33%	-
Not expanding / No plans to expand	14%	17%	12%	15%	14%	-	-
Not our customer base	11%	12%	10%	11%	-	33%	-
Too cold	6%	10%	2%	7%	-	-	-
Not interested	5%	5%	5%	5%	-	-	-
Don't know much about Edmonton	5%	-	10%	4%	14%	-	-
Not enough opportunity	5%	7%	2%	4%	-	33%	-
Poor economy	4%	5%	2%	4%	-	-	-
Oil based economy	2%	5%	-	3%	-	-	-
Don't like the city	2%	2%	2%	3%	-	-	-
Does not fit business model / strategy	1%	2%	-	1%	-	-	-
Lack of diversity	1%	-	2%	1%	-	-	-
Too far from family/friends	1%	-	2%	1%	-	-	-
Population too small	1%	2%	-	1%	-	-	-
Other	8%	12%	5%	8%	14%	-	-
Don't know / Refused	14%	19%	10%	12%	43%	-	-

Base: Canadian business respondents who are somewhat, very unlikely to consider expanding/moving business to Edmonton

*Caution to be used when interpreting results due to small sample size

K4 - Why are you "somewhat/very unlikely" to open a business in Edmonton?

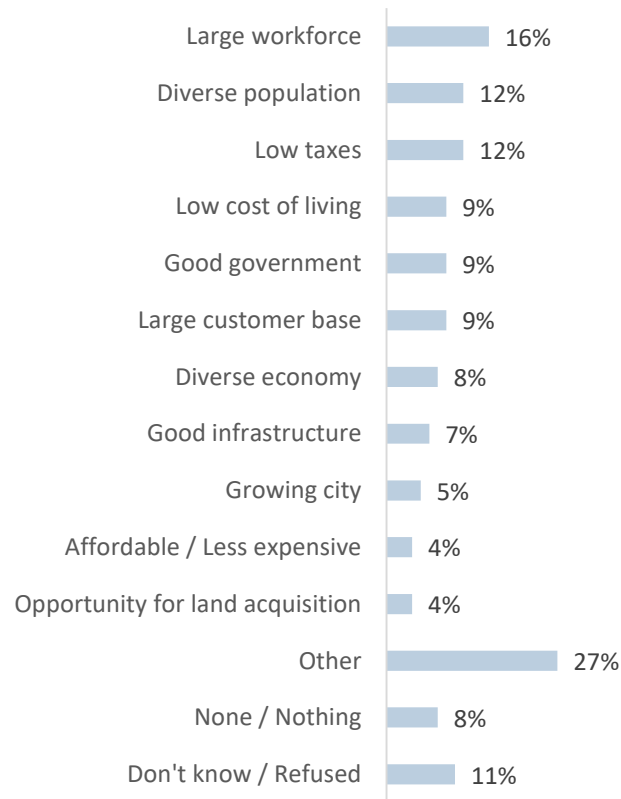
Half (50%) of Urban Canadians business respondents indicate being familiar (somewhat, very) with Edmonton, while one-third (33%) indicate being unfamiliar (not very, not at all).



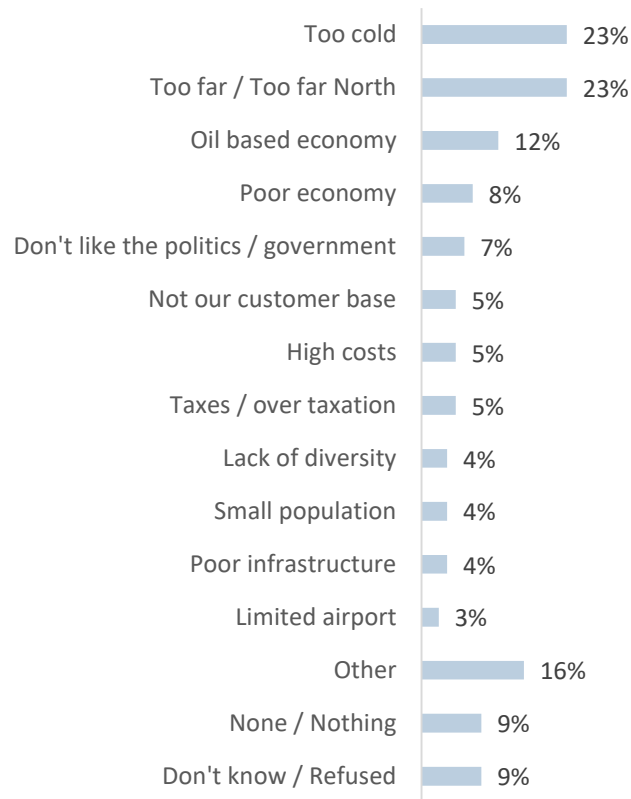
Canadian Business Respondents Familiarity with Edmonton

	Total	Familiarity		Company Description			
		Familiar with Edmonton	Unfamiliar with Edmonton	Wholly Canadian Based	Multi-national HQ in Canada	Multi-national HQ not in Canada	Other
n=	151	75	72	127	16*	6*	2*
Familiar (somewhat, very)	50%	100%	-	47%	75%	50%	-
Neither familiar not unfamiliar	15%	-	31%	13%	19%	33%	-
Unfamiliar (not very, not at all)	33%	-	69%	37%	6%	17%	50%
Don't know/prefer not to answer	3%	-	-	2%	-	-	50%

Canadian business respondents who are familiar with Edmonton, most commonly cite a large work force, diverse population, and low taxes, as Edmonton’s greatest assets in terms of operating a business.



Canadian business respondents who are familiar with Edmonton, most commonly cite the cold weather, as well as being too far/too far North, as drawbacks in terms of operating a business in Edmonton.



BUSINESS RESPONDENT PROFILE

BUSINESS RESPONDENT PROFILE

		Familiarity	
	Total	Familiar with Edmonton	Unfamiliar with Edmonton
n=	151	75	72
Gender			
Male	74%	80%	69%
Female	26%	20%	31%
City			
Toronto	40%	36%	42%
Vancouver	16%	19%	14%
Calgary	10%	15%	6%
Montreal	6%	4%	8%
Winnipeg	6%	7%	6%
Ottawa	5%	7%	4%
Saskatoon	5%	5%	4%
Hamilton	3%	3%	4%
Halifax	3%	-	6%
Regina	3%	4%	1%
Victoria	1%	-	1%
St. John's	1%	1%	-
Fredericton	1%	-	1%
Quebec City	1%	-	1%
Moncton	1%	-	1%
Employment Status			
Working full time	77%	84%	69%
Working part time	23%	16%	31%
Self-Employed			
Yes	72%	63%	81%
No	28%	37%	19%
Work for...			
A for profit company or organization	100%	100%	100%
Job Title			
CEO, Executive Director, President or Owner	65%	56%	72%
Executive, Executive VP, Senior VP, or VP	12%	15%	10%
Senior Manager	9%	12%	7%
Director	8%	9%	7%
Senior Management / Executive (not at board level)	3%	4%	3%
C-Level Management	3%	4%	1%

BUSINESS RESPONDENT PROFILE

		Familiarity	
	Total	Familiar with Edmonton	Unfamiliar with Edmonton
n=	151	75	72
Role in Expansion Decisions			
The sole decision maker	59%	52%	64%
A joint decision maker	28%	31%	28%
Providing advice or assistance to the decision maker(s)	13%	17%	8%

BUSINESS PROFILE

BUSINESS PROFILE

		Awareness	
	Total	Aware of Edmonton	Unaware of Edmonton
n=	151	75	72
Number of Employees			
10 or fewer	70%	65%	72%
(Net) 11+	30%	35%	28%
11 – 20	5%	3%	8%
21 - 50	7%	4%	10%
51 - 99	4%	7%	1%
100 - 199	5%	8%	3%
200 - 499	2%	1%	3%
500 or more	7%	12%	3%
Number of Office/Branch Locations			
1	77%	67%	88%
2	6%	9%	3%
3	4%	5%	3%
4	3%	4%	3%
5	1%	1%	1%
6	1%	1%	1%
8	1%	1%	-
12	1%	1%	-
15	1%	1%	-
50	1%	1%	-
67	1%	1%	-
80	1%	1%	-
100	1%	1%	1%
125	1%	1%	-
130	1%	1%	-
Mean	5.8	9.1	2.7

BUSINESS PROFILE

	Total	Awareness	
		Aware of Edmonton	Unaware of Edmonton
n=	151	75	72
Head Office Location			
Toronto	34%	35%	33%
Calgary	11%	16%	6%
Vancouver	11%	11%	11%
Montreal	5%	4%	7%
Winnipeg	5%	5%	6%
Saskatoon	5%	5%	4%
Halifax	3%	1%	6%
Ottawa	3%	3%	3%
Regina	3%	4%	1%
Quebec City	1%	-	3%
Hamilton	1%	-	3%
Burlington	1%	1%	1%
Mississauga	1%	1%	-
Markham	1%	-	3%
Stouffville	1%	1%	1%
Surrey	1%	3%	-
St. John's, Newfoundland	1%	1%	-
Fredericton	1%	-	1%
Victoria	1%	-	1%
Moncton	1%	-	1%
Outside of Canada	2%	1%	3%
Other Canadian cities	7%	7%	6%
Type of Company			
Wholly Canadian based with no operations or ownership outside of Canada	84%	80%	89%
A multinational company headquartered in Canada	11%	16%	6%
A multinational company headquartered somewhere else in the world	4%	4%	4%
Other	1%	-	1%

BUSINESS PROFILE

	Total	Awareness	
		Aware of Edmonton	Unaware of Edmonton
n=	151	75	72
Cities with Operations			
Toronto	40%	41%	39%
Calgary	22%	33%	11%
Vancouver	21%	27%	15%
Ottawa	14%	17%	11%
Montreal	13%	17%	10%
Halifax	12%	16%	8%
Winnipeg	12%	16%	8%
Saskatoon	11%	15%	7%
Regina	9%	15%	4%
Quebec City	9%	11%	7%
Hamilton	8%	8%	8%
Edmonton	7%	12%	3%
Moncton	6%	8%	4%
Victoria	6%	8%	4%
Fredericton	5%	8%	3%
St. John's, Newfoundland	4%	7%	1%
Burlington	3%	3%	1%
Surrey	2%	3%	1%
Markham	1%	-	1%
Stouffville	1%	-	1%
Outside of Canada	7%	11%	3%
Other Canadian cities	5%	7%	4%
Don't know/Prefer not to answer	1%	-	1%

BUSINESS PROFILE

	Total	Awareness	
		Aware of Edmonton	Unaware of Edmonton
n=	151	75	72
Industry			
Professional services not mentioned above	36%	29%	42%
Technology	13%	13%	13%
Construction	9%	7%	13%
Financial Services	9%	13%	4%
Manufacturing	8%	12%	4%
Retail Trade	7%	4%	10%
Arts, Entertainment, and Recreation	7%	9%	3%
Energy resources	4%	5%	3%
Wholesale Trade	4%	5%	3%
Scientific Research	3%	4%	3%
Hospitality	3%	4%	1%
Health and Life Sciences	2%	1%	1%
Marketing, advertising, public relations or communications	2%	3%	1%
Agriculture, Forestry, Fishing and Hunting	1%	3%	-
Logistics, Transportation and Warehousing	1%	-	3%
Educational Services	1%	1%	1%
Mining, excluding energy	1%	1%	-
Telecommunications	1%	1%	-
Other	1%	-	1%



APPENDIX D

QUALITATIVE RESEARCH REPORT

Draft Report

City of Edmonton

Place Branding Research
Qualitative Research



DATE 2020-01-07

Leger

We know Canadians

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BUILD YOUR BRAND

CONTEXT AND OBJECTIVES

CONTEXT AND OBJECTIVES

The City of Edmonton is working with Leger to conduct Edmonton Place Brand research to:

- Determine the perceptions among not only Edmontonians, but also those outside of Edmonton, of where Edmonton stands in terms of awareness and image in comparison to other Canadian cities
- Determine the top attributes that motivate Edmontonians and those outside to move to/live in, visit, study, and invest in a city, and how Edmonton compares to others
- Understand opinions and perceptions of Edmonton among Edmontonians, local businesses, and foreign businesses operating in Edmonton

Some key messages provided to Leger by the City of Edmonton when developing the research plan were:

- A place brand is the perception people have of a city, based on their awareness of and experience with that city
- The goal of this research is to identify gaps between how the city is perceived, and how it wants to be seen
- The City will work with the key organizations that have an impact on Edmonton's place brand to help influence and evolve our authentic and unique place brand
- Having a distinctive place brand is one of a city's most valuable assets because it leverages all other economic development efforts to give a city a strong strategic advantage in attracting visitors, investments, and talent

This report outlines and discusses the ideas, and perspectives, viewed by Leger in 11 in-depth interviews with various city stakeholders, and 4 focus groups with newcomers, lifers, and entrepreneurs.

BUILD YOUR BRAND

METHODOLOGY

METHODOLOGY

FOCUS GROUPS

Four focus groups were conducted by Leger at their Edmonton office, in their professional qualitative facility.

Two groups were conducted with 'Newcomers' on June 26th (8pm-10pm: 7 participants in total) and June 27th (6pm-8pm: 6 participants). In order to qualify as a participant for these groups participants had to meet the following criteria:

- Aged 18+
- Must currently be a resident of Edmonton
- Arrived from somewhere else in Canada in the past 5 years
- Excluded those working in market research, advertising, PR, media, journalism
- Excluded those who have attended a focus group in the last 12 months, or more than 3 focus groups ever

One group was conducted with 'Lifers' on June 26th (6pm-8pm: 5 participants). In order to qualify as a participant for this group, participants had to meet the following criteria:

- Aged 18+
- Must currently be a resident of Edmonton
- Lived in Edmonton for at least 20 years
- Exclude those working in market research, advertising, PR, media, journalism
- Exclude those who have attended a focus group in the last 12 months, or more than 3 focus groups ever

One group was conducted with 'Entrepreneurs' on June 27th (12pm-2pm: 8 participants). In order to qualify as a participant for this group, participants had to meet the following criteria:

- Aged 18+
- Own (either totally or in partnership) a small business that operates in Edmonton
- First opened that business within the past 7 years

Groups were all approximately 1 hour and 45 minutes in length, and the discussions revolved around the reasons for moving/living/staying/having business in Edmonton, sense of Edmonton pride, perceived strengths and weaknesses of Edmonton in regards to branding, and the role of the City and stakeholders in overcoming the Place Brand challenges.

METHODOLOGY

IN-DEPTH INTERVIEWS

A total of 11 in-depth interviews were conducted with various executive stakeholders in Edmonton, between June 14th and July 10th, 2019.

The stakeholder contact list was prepared by the City of Edmonton and Leger, and the City of Edmonton made initial contact with all participants to formally invite them to participate. Interviews were then scheduled by Leger, and conducted by senior Leger staff experienced in one-on-one interviewing.

Interviews lasted 45 minutes on average, and the discussions revolved around internal (Edmontonians) and external (non-Edmontonians) perceptions of Edmonton, attracting talent and investment, and the perceived role the City should play in the current Place Brand challenge.

METHODOLOGY

CAVEAT

The qualitative findings in this report (for in-depth interviews and focus groups) provide a summary of the opinions expressed by interviews and focus group participants. These discussions are exploratory in nature with the flexibility to uncover and examine topics and issues relevant to project objectives. Results cannot be generalized or quantified, but rather are to be considered in a qualitative frame of reference.

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EXECUTIVE SUMMARY

FOCUS GROUPS

'Newcomers' were very engaged and excited to be living in Edmonton. They were more positive, in comparison to 'Lifers', in their initial thoughts regarding Edmonton focusing on work opportunities, family, friends, feeling welcome, wanting a change, work-life balance, etc.

"This is where my heart is. Always missed it, loved it. Wanted to come back."

The lifers were more cynical and appeared more jaded. It took a lot to get them to think about Edmonton in positive terms and they tended to remain focused on elements such as parking, bike lanes, construction, etc., rather than looking at the bigger picture. They did feel that Edmonton's festivals, arts and food scene, and River Valley, were positive aspects of the city.

"I have travelled around, and realized Edmonton isn't as bad as some say. It's got plusses."

The entrepreneurs had trouble pointing to the 'secret sauce' that made Edmonton a place for entrepreneurs, they did however have a clear understanding that there is a deep seeded risk tolerance here and that there is a lot of support for new businesses, and did not seem to feel that the City got in their way of success.

"So, I found in Edmonton, part of the nice thing was it didn't matter who you knew. If you work hard, and you're dedicated, and you keep working, you'll be able to succeed at something. Rather than having to have the right family name, or the right connection."

Generally, regardless of group, participants feel that Edmonton's small town feel, people (down-to-earth, friendly), livability and affordability, economic opportunities, overall quality of life, entertainment/festivals, location (largest, most northern municipality), and cultural diversity, were some of the key characteristics that make Edmonton stand out.

"You have that feel of living in a very small community. That's one thing I really appreciate."

When discussing others' perceptions of Edmonton, many participants mentioned 'Deadmonton', the conversations tended to revolve around outsiders' general lack of knowledge of anything to do with Edmonton, or only being able to reference stereotypes- 'Oil sands', 'Hillbilly town', 'Redneck', 'Cold/Snow'. However, among those participants who did have visitors, they noted that their visitors leave Edmonton with generally positive impressions, and/or sensing the aspirational energy/spirit.

"I try to describe us as a pretty pleasant, mid-size town, northern city in western Canada."

Participants were asked to discuss what they felt were Edmonton's strengths. Entrepreneurial spirit, perseverance, Artificial Intelligence, post-secondary institutions, sense of community, work-life balance, affordability, entertainment/festivals, diversity, and the River Valley, were consistent mentions among all groups. When asked to discuss the challenges Edmonton is facing in regards to people's perceptions, participants most commonly discussed public transit, homelessness, preconceived notions, weather, and lack of marketing.

"I think the problems are maybe not that tangible. Edmonton's challenged in marketing themselves to the rest of the world. There has to be some kind of coordinated type of campaign. Calgary has been really good at marketing themselves, and Edmonton has been sort of letting things happen."

"You have to live here to appreciate it. That's the hard part. You can't sell someone on the idea of Edmonton really easily."

FOCUS GROUPS

None of the challenges discussed (principally social issues like homelessness) were considered unique to Edmonton or unfixable (except the weather). The general opinion was that there are no unsolvable problems for the city to deal with, it just takes political will and 'big thinking'.

"Edmonton's a really bad tourist city. If you were to come on your own it would be such a pain to get around everywhere. Everything is so spread apart."

Participants felt that focusing on Edmonton's diversity, economic opportunities, quality of life, entrepreneurial spirit, open spaces, and sense of community, were all key aspects of 'pitching' Edmonton to others.

"Everything is growing here, and will continue to grow, and that gives you an opportunity to be part of a growing community."

"We have all those little pieces that make it important to sustain your lifestyle."

IN-DEPTH INTERVIEWS

Stakeholders were very positive and excited when talking about Edmonton. When asked what they felt was Edmonton's unique selling proposition stakeholders most commonly mentioned the young demographics, rapid growth, affordability, quality of life, welcoming spirit, willingness to help, sense of community, drive, and humbleness.

"Edmonton is where you take an idea and make it real."

When asked who Edmonton competes with, many were quick to say everyone, specifically Calgary, Montreal, Toronto, and Vancouver, while others were quick to say that they feel we shouldn't compete with anyone. They feel we spend too much time and energy worrying about what everyone else, more specifically Calgary, is doing, and not enough time and energy focusing on what we are doing, could be doing, and should be doing. Some took the conversation further, by adding that we should be looking to collaborate with other Alberta cities, primarily Calgary, and work toward global recognition as a team.

Stakeholders were very clear and concise when discussing Edmonton's strengths. Artificial Intelligence, health and life sciences, affordability, opportunities, post-secondary institutions, arts, culture, food, festivals, sense of community, and collaborative spirit, were all discussed amongst numerous participants.

"If you are good at something, Edmonton will let you run wild. If you are good at your job and hard working, people in this city will let you do what you want to do and they will support you."

Conversely, when it comes to Edmonton's weaknesses, stakeholders most commonly discussed agility, preconceptions, lack of confidence, and not telling our story(ies) enough.

"We hear too much of bureaucratic issues, need to be better at telling success stories."

"At the moment it feels like we are aiming for nothing."

All the stakeholders that participated in this phase, have regular interactions with outsiders both nationally and internationally. They commented that it is very common that others have no idea where Edmonton is, what Edmonton has to offer, and what is going on. They find that Edmonton is plagued by preconceived notions of being cold, hillbilly, or just a mall. They are surprised to hear about the thriving eco-system, events, developments, research going on, and when they come to visit they are surprised to see how kind, open and helpful people are.

In order to position itself as a destination for the future workforce generation, stakeholders feel that Edmonton needs promote its strengths such as affordability, opportunities, flexibility, etc. They feel that the city needs to get better at telling its success stories and be more aggressive when doing so.

IN-DEPTH INTERVIEWS

Stakeholders feel that the City needs to provide a common message, and work with citizens as well as stakeholders to become excited about Edmonton. Some also mentioned that the City needs to get out of its own way, and become the leader in confidence for Edmonton. They feel that if the City can do this then they can fulfill their role as brand ambassadors and tell Edmonton's story.

"Figure out the city brand, and work with organizations, like post-secondaries, to have a common message."

"We are comfortable in following someone with a dream and a bit of passion, not a lot of places will do that. People will rally around you in this city, we are a weirdly non-competitive environment."

"Be bold, don't be apologetic, don't try and do it the way someone else has done it. Stop consulting people to death, and just take the plunge. You won't always be right, but just be bold and things will start to stick. Be true to ourselves, we are a pretty remarkable place."

"Create a brand from the inside out."

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KEY THEMES MOVING FORWARD

KEY THEMES MOVING FORWARD

Based on our findings through the qualitative phases of this research project, the following themes continued to surface during all our of discussions. These themes will help in the development of the quantitative survey instrument moving forward (in no particular order):

Diversity

Diversity is very important when it comes to Edmonton and is special and exploitable. Participants talked in great detail about the diversity of culture, work opportunities, food, and entertainment scenes. Participants felt that it is Edmonton's diversity in all of these different characteristics that really made Edmonton unique and special. As well, that it was something that continually surprised outsiders to learn about Edmonton.

Friendly / Helpful / Open / Non-judgemental people

The people in Edmonton make the city great, is general consensus among participants. This relates to the 'small town feel with big city amenities' that arose through the conversations. Participants continually reference people's friendly and helpful nature as something they experience daily, as well as a key takeaway from visitors.

Welcoming / Accepting of newcomers

Not only do participants find Edmonton friendly, helpful, open, and non-judgemental, they also find it very accepting of newcomers. This quality also lends itself to the city's vast diversity. Not only do participants feel that Edmonton is welcome to newcomers such as immigrants, they find it accepting and welcoming of business ventures and big ideas. This is something that many participants, particularly entrepreneurs, feel is a big strength of Edmonton that many people don't realize until they are already here.

Easy to make friends/join a social circle

The notion that it's easy to make friends/join a social circle in Edmonton is something that came up strongly among the 'newcomers' groups in particular, and was discussed among other participants as well. This can be viewed as an outcome of the perception of Edmonton being friendly, helpful, open, and non-judgmental. It is something that participants felt was important for other to know about what they like about Edmonton.

Feels like home

Many participants commented that Edmonton feels like home. Some participants who had previously moved away from the city, and returned, mentioned that Edmonton always just felt like home for them, and that they would always return, or felt they had to return. It is also the reason many stated that was keeping them from leaving Edmonton.

KEY THEMES MOVING FORWARD

Small town feel with big city amenities

This was a big draw for many respondents. A few had come from Saskatchewan or smaller rural areas of Alberta, and wanted to move to a bigger city but also wanted to keep the small town feel that is comfortable and less intimidating. It makes Edmonton feel comfortable and safe for these participants, and is something that they feel is easily explainable to others when explaining why they live in Edmonton and like it so much.

Great arts, food and culture scene / Lots to do

The arts, food, and culture scene in Edmonton came up a lot among participants. It is something that they feel no one knows Edmonton has to offer. It not only shocks visitors, and outsiders when brought up in discussions, but even Edmontonians themselves. They feel that a lot of people don't even know what is in their own backyard. So not only are these seen as strengths of Edmonton, but it also draws out a weakness in that the city does not do enough to showcase what it already has going on that makes it such an amazing place to live and visit. Participants feel that the arts scene is particularly understated and underappreciated.

Summer/winter activities

Although the long winters are seen as a big hurdle for Edmonton among most participants, it is something that is out of the city's control, so participants feel that the city must make the most out of the situation. Some mentioned that they felt the City was doing a better job at having more indoor activities during the winter months, and that this should be continued moving forward. Others felt that the city needs to embrace the winter and make the most of it, and more needs to be done about promoting these activities. Many participants also mentioned making better use of the River Valley during the summer months, with some even commenting that there should be more retail/commercial opportunities within the River Valley itself to expand the experience from just activity and outdoor enjoyment.

Access to urban-outdoor space

Many participants brought up the desire for more urban-outdoor space. Whether that be in the River Valley, or in the urban centres, particularly downtown. Downtown was a big talking point among participants in this regard. They feel that further development is needed in order to make the downtown core not only more desirable to visitors, but residents as well. Participants noted that the community feel that encompasses much of the other city neighbourhoods does not exist downtown, and that by adding features that make the downtown core more livable- schools, shopping, dining, walkability of these amenities, the desire for people to live and visit downtown Edmonton will flourish.

KEY THEMES MOVING FORWARD

Easy to succeed / Make things happen

Participants noted in numerous ways, that Edmonton is a city where you can take an idea and make it happen. They attributed the city's non-judgemental, open, and friendly nature as a key component to this attribute. The small town feel also a factor here, as participants commented that this helps people be able to reach who they need to in order to get their ideas off the ground. This opinion was particularly strong among stakeholders.

More 'working class' values / Not pretentious / Humble

Edmonton's 'working class' values, or being a humble city, was brought up during various points of the discussions. It presented as both a strength of Edmonton as well as a weakness. A strength, in the perception that is better to be humble than pretentious, and a weakness in that it allows the city to get in its own way when it comes to promoting itself to the outside world. Stakeholder participants in particular noted that the City needs to do a better job at being a leader in confidence when it comes to Edmonton. Once the City does this, they will then be equipping citizens as well as stakeholders to do the same.

Location / Easy to get in and out

Being the largest northern most municipality is seen as a huge strength among many participants, particularly the stakeholders who have more first hand experience with this selling feature. Edmonton has a great transport system by both rail and air, and our location makes it very easy to move products north and south, as well as east and west. Participants feel that this is something many outsiders don't know about Edmonton unless they have experience with it.

Easy to get around

This one is a double edged sword. Participants did mention that Edmonton is easier to get around than larger municipalities such as Toronto and Vancouver, strictly from a size point of view. But they also noted public transportation as one of Edmonton's weaknesses. Although they acknowledge the City is making efforts to improve public transit, some participants are still weary that it will not be enough, or question the process in which the changes are occurring. Ease of transportation is, however, a key theme that is important to participants regardless of their point-of-view, and is a theme that should be explored further.

BUILD YOUR BRAND

DETAILED RESULTS

FOCUS GROUPS

LIFERS

REASONS

First three words that come to mind when 'Lifers' think about Edmonton:

- Flat
- Boring / Plain / Quiet
- Home
- River Valley / Parks
- Festivals
- Long winters
- Exciting
- Capital city
- Beautiful
- Winter city
- Growing

What keeps 'Lifers' rooted in Edmonton?

- Family
- Job (pension)
- Health reasons
- Familiar with the city
- Decent economy
- Decent jobs
- Great food
- Good local attractions
- Great summers (festivals, river valley)
- Peaceful
- Can get everything you need here (except shopping)
- Moderate temperatures
- Concerts
- Comfortable

"Edmonton is home."

"Grew up here, don't know anything different."

"I have travelled around, and realized Edmonton isn't as bad as some say. It's got plusses."

"It's a really great place to raise a family."

"There is a kind of peacefulness, and a willingness to know your neighbours."

"Edmonton's summers are magical, and the winters can be long, but that's why there is hockey."

"I like that I can go downtown and I can feel comfortable. Even with some of the areas a bit sketchy, with the people that are hanging around Rogers Place, I still feel comfortable enough that I can walk around at night and not have to worry about my purse. I can get on the LRT, and it can be busy, but I can still feel confident."

REASONS

Have 'Lifers' considered moving elsewhere?

- Vancouver
- Kelowna
- San Point Cordelaine
- Toronto- have family there
- LA
- Maybe once retired
- Montreal
- Calgary- being so close to the mountains

Do 'Lifers' think they would have the same quality of life elsewhere?

- Calgary- housing more expensive
- British Columbia- no, salaries significantly less

"If I were to live somewhere in Canada, probably Vancouver. Because Vancouver has the mountains, it has the ocean, it has the decent weather. But it also feels really crowed there, the traffic is horrible, and the cost of living is way higher."

"But really, I would never leave Edmonton. The health care is fantastic. You can actually afford a really nice home here. It's a lot more financially difficult to buy a home anywhere else."

EDMONTON PRIDE

When 'Lifers' tell people they live in Edmonton, here is what people say:

- Most don't know where Edmonton is
- Majority have never heard of Edmonton
- Talk about temperature
- Stereotypes- Redneck Alberta
- Oilers

'Lifers' itinerary for visitors to Edmonton:

- Tour of Alberta- Edmonton to either Calgary or Drumheller, then west to the mountains, up through Jasper, then back
- Don't get the sense of Edmonton from a short visit
- Don't know there is to do in the city
- Whyte Avenue- lots of restaurants
- Festivals- Fringe Festival, Street Performers Festival
- Farmers Market
- Museum
- Art Gallery
- Muttart Conservatory
- River Valley
- West Edmonton Mall
- Oilers game
- Downtown

"I try to describe us as a pretty pleasant, mid-size town, northern city in western Canada."

"You want to show them a little bit of what Alberta has to offer, but in terms of what Edmonton has to offer, usually people don't stay here long enough to really appreciate all the things we do have. Like all the fun little festivals or just the really comfortable weather that we have in the summer. Access to a lot of nice things in general. A lot of it has to be a lived experience. If you are here for three days, you're not really going to understand Edmonton. Unless you're really targeting something, and really, you don't get Edmonton out of a festival. You get Edmonton out of life."

"I know it sounds really stupid, but I don't even know what there is to do in this city. I just do what I normally do. The new museum for sure."

"The best time to visit would be right in-between K-Days and Heritage Days. That's a really great time to show off, really embrace our multiculturalism."

EDMONTON PRIDE

What 'Lifers' think is unique to Edmonton:

- Hotel MacDonald
- Funicular
- River boat
- Festivals- K-Days, Heritage Days, Cariwest Festival
- Food scene- Taste of Edmonton
- River Valley- there is someone outside all the time, fitness, leisure
- Viewed as hard working
- Mentions of the new Waltherdale Bridge, and wishing that Edmonton did more of that (more interesting things to look at)
- Acknowledged that more local art is appearing in public spaces
- Good community theatre

*"Our art scene is muted, and a bit understated. It's not super loud, but strong and we have really good work."
"You have to live here to appreciate it. That's the hard part. You can't sell someone on the idea of Edmonton really easily."
"Salt of the earth people."*

CHALLENGES

What 'Lifers' feel are the main issues or challenges in Edmonton, regarding people's perceptions of Edmonton:

- Bad tourist city- difficult to get around, major attractions are spread apart
- Limited transit system
- Construction makes difficult to get around
- Cold winters- makes difficult to do things
- Economy
- Homeless population
- Lack luster welcoming into the city- boring drive from airport, IKEA, single story semi-commercial, semi-industrial places
- Quiet nightlife
- Perception Edmonton is all oil
- No central places/attractions
- Music/arts events not consistent year-round
- Downtown accommodations too expensive compared to outlying areas (southside, westside)
- Neighbourhood vitality

Do 'Lifers' think Edmonton is close to solving these problems?

- Public transportation is making improvements- some mention that it is still not being planned well, some mention that Edmonton is very much a driver city
- Bike lanes- some feel they are great, others feel Edmonton roads are not designed for bike lanes and they are only causing issues

“Edmonton’s a really bad tourist city. If you were to come on your own it would be such a pain to get around everywhere. Everything is so spread apart.”

“There’s no central places to go and walk and spend the day.”

“Winters are super cold, which makes it hard to do things in the winter. It was better this year that they had more activities and stuff to do inside throughout the city, but in the past there’s not a lot that goes on in the winter that is actually fun to do inside.”

VISION

'Lifers' dream city:

- Safe
- Quality senior housing
- Walkable areas with retail
- Lots of green space
- Safe public transportation
- High quality education
- Top notch health care
- Environmentally friendly- green bins, top notch recycling facility
- Good recreation centres
- Ongoing cultural events
- No homelessness
- Better public transportation to get from one end of the city to another
- Sustainable power- solar panels
- Mixed use areas

- Medium to high density closer to the core
- Walkability
- Accessibility- mobility impaired, bike lanes, transit
- Great infrastructure
- Locally owned businesses in neighbourhoods
- More awareness of public events
- Great entertainment- shops, food, events
- Affordable
- Pedways to get around downtown core during winter months

How close, or how far, do 'Lifers' feel Edmonton is from fulfilling their dream city?

- Far
- Not pushing enough right now

"Something nice to look at."

"Roadways to get around the whole city, appropriate speed limits based on the area, downtown core similar to Vancouver or Montreal."

"Homelessness would be addressed. No homelessness! Everybody could afford a home."

"Not happening in my lifetime."

"We have glimmers of home in almost every single aspect, but we just haven't pushed any of those far enough. We do things well in pockets, but as a whole, Edmonton isn't good at doing that."

ELEVATOR PITCH

That Edmonton is the city which they should move to...

“Need affordable housing? We got you! Like multicultural events? We got you! Enjoy shopping? Well, our LRT will get you there. Do you like festivals? We’ve got some of those. Your kids going to school? We’ve got great schools and great universities.”

Thoughts...

- Lively
- Looking after everything
- Slogan- “We got you” is endearing and laid back

“Edmonton! What’s Edmonton? A diverse city, with lots to offer. From festivals, to arts, to sports, we have a bit of it all. Looking for a place to raise your family or a place to run around with your pets? The whole theme is, we’ve got a bit of it all.”

Why ‘Lifers’ feel people are not flocking to Edmonton:

- Perception is there is nothing to do
- We’re not diverse- only oil and gas
- Perceived as redneck community
- Not much culture
- Cold

What ‘Lifers’ feel Edmonton needs do a better job promoting:

- A leader in recycling
- Great water quality
- Beautiful river valley
- Safe
- Affordable
- Good quality of life

“We all stay here for a reason. I grew up here. I know Edmonton. I love Edmonton, I really do. I wouldn’t leave because the roads suck or they’ve got that stupid bike lane outside my office. It doesn’t make me want to leave. I love the summer here. I see the trees start blooming in the river valley, and I go out running again. Each city has their problems.”

“We have a little bit of everything, and you can’t promote that. ‘Jack of all trades’, that’s not sexy. You can’t be like ‘we are adequate in every way, shape, and form, and we fulfill your needs!’ That’s not marketable.”

“I think we’re just humble. We’re not flashy. We don’t need to brag,”

“We have all those little pieces that make it important to sustain your lifestyle.”

NEWCOMERS

REASONS

Reasons 'Newcomers' chose to live in Edmonton:

- Work
- Family / friends
- Wanted a change of pace from small town
- Do bigger, better things
- Personal life
- Small town feel and city amenities- concerts, festivals
- Economic opportunities
- Family friendly city
- Military
- Work-life balance
- Health issues
- Welcomes foreign graduates

Other cities 'Newcomers' considered:

- Toronto- because of having family there
- Burnaby
- Calgary
- Prince George
- Montreal
- Regina

Things 'Newcomers' felt Edmonton was lacking when making their decision:

- Parking
- Summer
- Public transportation

"This is where my heart is. Always missed it, loved it. Wanted to come back."

REASONS

Things that made 'Newcomers' choose Edmonton / what made Edmonton stand out:

- Small town feel
- Blue collar city
- People- down to earth, friendly, casual, realistic
- Economic opportunities
- Cost of living
- Geographic location- river, mountains, entire north country (oil and gas)
- Sports teams
- Entertainment
- Restaurants- food scene
- Diverse culture
- Acceptance of all walks of life
- Sense of community
- Welcoming

Things that are keeping 'Newcomers' in Edmonton:

- Comfortable
- Work
- Family / friends
- Don't have many reasons to leave
- People- friendly, keep to selves, accepting, kind
- Festivals / events
- Feel safe
- Lots to keep busy and active
- Realistic standard, not superficial
- Energy

"For me, Edmonton's got a certain charm to it. It's still got a small town feel. Reminds me of Saskatoon, just a lot more happening. More opportunity."

"You have that feel of living in a very small community. That's one thing I really appreciate."

"Being in a smaller city was hard. Being in a place that accepts me for who I am, it means so much more to me. Being able to be safe walking around. Everyone keeps to themselves. Very friendly, very accepting, very kind. You do find those bad eggs, but not too much."

"I don't know what it is, but something still gravitates us back to Edmonton. Some sort of energy."

EDMONTON PRIDE

When 'Newcomers' tell people they live in Edmonton, here is what people say:

- Deadmonton
- Snow
- IKEA
- Waterpark
- West Edmonton Mall
- "Do you work in the oil sands?"
- Small town
- Conservative
- Hillbilly town- 'Honky Tonk Edmonton'
- Overshadowed by Calgary
- Have no idea- "Where is that?", particularly in the USA
- Too far- family out East
- Too expensive to get too- family out East
- Don't see Edmonton as any kind of player

'Newcomers' itinerary for visitors to Edmonton:

- West Edmonton Mall
- Whyte Avenue
- Elk Island
- Mountains
- IKEA
- Olive Garden
- Jasper Avenue
- Oilers game
- Concerts
- Festivals- K-Days
- Farmers Market

Visitors impressions of Edmonton:

- General positive impressions
- Sense aspirational energy

"They have an idea that it's like Saskatoon, pretty small. But it's cool, it's fine. I tell them, "You gotta come out here!""

"A lot of people have no idea."

"...Now, most of my friends and family are starting to realize how much more there is. Not just West Edmonton Mall. That overshadows some of the tourism."

CHALLENGES

What 'Newcomers' think are Edmonton's strengths:

- Entrepreneurial spirit
- Artificial intelligence
- Research and innovation- University of Alberta
- Local businesses- restaurants, retail, breweries
- Opportunity to take chances
- Work-life balance
- Affordability
- Always something go on- festivals, walking paths, River Valley, West Edmonton Mall
- Government programs- AISH
- Diversity
- Welcoming
- Less competitive
- Sense of community

What 'Newcomers' feel are the main issues or challenges in Edmonton, regarding people's perceptions of Edmonton:

- Homeless population downtown- big deterrent
- Conservative
- Not using public transit
- Marketing self to the rest of the world
- Lack of street recycling and compost bins
- Public transit system
- Safety- others perception of how safe of a city Edmonton is
- Bad drivers
- Social issues
- Lack of mental health supports
- Weather- winter
- Construction
- Cost of travel

"There's a lot of people in the dense population, so for an entrepreneur, you can make an impact very quickly. You can succeed or fail, and you can retry a lot quicker."

"I think the problems are maybe not that tangible. Edmonton's challenged in marketing themselves to the rest of the world. There has to be some kind of coordinated type of campaign. Calgary has been really good at marketing themselves, and Edmonton has been sort of letting things happen."

"One thing we keep coming back to is the homelessness. That's something that's bothered me more and more as time went on."

VISION

'Newcomers' dream city:

- Good public transit- easy to get around, speed rail, better walkways for pedestrians
- Close to mountains
- Old and new architecture- different characteristics
- Quality neighbourhoods- new and modern designs, character neighbourhoods, old homes, lots of trees
- Natural and urban spaces- like the River Valley
- Sporting venues
- Clean- no littering
- Cultural and social acceptance- no hate
- Monuments
- Events / festivals- celebrations, things going on, family-oriented, music
- Amusement park
- Large body of water- river, lake, ocean
- Free outdoor physical centres- gyms, workout areas
- Better education

- Affordable
- More homeless shelters- no one lives on the street, everyone has a home
- Better income
- More accessible for lower income
- Low crime rate
- Better health care- better access, more timely
- Warm weather
- Diverse culture
- Diverse food
- Diverse people
- Great economy
- Innovation
- Focus on technology
- All major sports teams
- Camels- for camel milk
- Innovative road design
- Community centres all over- places for young and old
- Responsive government
- Sustainable- good waste reduction services
- Focus on renewable energy
- Beaches
- Knowing neighbours
- Great grassroots community development

"Would prefer to live in a world where no one lives on the street."

"Better income, more accessible for lower income."

"Lots of diversity in culture, people, and food. Needs to be quirky."

VISION

How close, or how far, do 'Newcomers' feel Edmonton is from fulfilling their dream city?

- Need to improve public transportation
- Need a more responsive government
- Need a greater focus on sustainability
- Very close

*"I can see parts of where I want to be here."
"I don't think I would want to live anywhere else."*

ELEVATOR PITCH

That Edmonton is the city which they should move to...

- Push on the strength of diversity
- Economic opportunities
- Family dynamic
- Quality of life
- Entrepreneurial way
- Open spaces
- Feeling of home

“Welcome to Edmonton. It’s affordability! It’s diversity! It’s opportunity awaits you! YEG. The brightest place to see yourself with your family.”

“Welcome to Edmonton. We have family friendly amazing healthcare. There’s always an opportunity to advance. An opportunity to start again fresh. We have beautiful summers. Great work-life balance. Great pay. Good social circles. Being able to leave work at work. Outdoor greenery, and you can definitely see all four seasons- even in a day!

“Come to Edmonton. Why? Because you’ll enjoy the warmest, friendliest people, who are diverse and accepting of everyone. This type of diversity and culture is reflected in all of our festivals. Such as the Heritage Festival, Taste of Edmonton, Fringe Festival. Take a walk through our beautiful River Valley, a hike in Elk Island, or stroll around our iconic Whyte Avenue. With a vibrant, bustling downtown core, we’re unrivaled. With affordable housing, and a great standard of living, Edmonton caters to all walks of life.”

“Edmonton. The heart of the prairies. Our bustling cultural diversity provides an opportunity for everyone. From the eclectic atmosphere, food, and nightlife of Whyte Avenue, to Hawrelak Park, and the beautiful River Valley, there is no opportunity to be missed. Edmonton has a space for everyone.”

“Edmonton has made incredible strides towards a unique and diverse identity, and this is your opportunity to be a part of it. We have job opportunities.”

“Everything is growing here, and will continue to grow, and that gives you an opportunity to be part of a growing community.”

“It’s basically saying, how do you get people to connect with a passion? To connect with a greater emotional attraction to this city, that makes them want to come here? For me, what makes Edmonton special is the people, the acceptance, the ‘being true to yourself’. Being who you are as a person, and not feeling that you have to put on a mask every day.”

ELEVATOR PITCH

That Edmonton is the city which they should move to...

“Welcome to Edmonton. We have family friendly amazing healthcare. There’s always an opportunity to advance. An opportunity to start again fresh. We have beautiful summers. Great work-life balance. Great pay. Good social circles. Being able to leave work at work. Outdoor greenery, and you can definitely see all four seasons- even in a day!”

“Have you heard of Edmonton, Alberta, guys? There’s more in it than just West Edmonton Mall. It can be one of the biggest malls in world but it’s about the people that are in the mall. It’s about the diverse culture. You can soak up the city. And if you don’t want to do it in the mall, you can do it outdoors. We are Festival City. We’ve got Heritage Days, where it gets you all the cultures, all the things. And we have the sites to do it, with a beautiful sunset that will last longer than anywhere else.”

ENTREPRENEURS

REASONS

First three words that come to mind when 'Entrepreneurs' think about Edmonton:

- Diverse
- Advantages
- Opportunities
- Space / layout
- Conner McDavid
- Whyte Avenue
- West Edmonton Mall
- Cold / winter
- Culture
- Home
- Green
- Construction
- Money
- River valley

- Urban
- Working class
- Childhood
- Large
- Busy
- Entertaining
- Small
- Safe
- Beautiful

"A lot of business opportunities for whatever business stream that you have because of the cultural diversity, the space, and how it's laid out. You can go across the city, you can stay in a small area."

"Of all the place I've lived, it's a really green city. There's a lot of green space, it's usable versus just kind of bushy and not touched. There are paths, there's people, so you actually feel safe in it."

REASONS

What Entrepreneurs think is good about Edmonton to open a business:

- Very easy
- Rewards hard workers
- Less cliquey
- Eager to give new businesses a chance
- Welcoming to non-traditional revenue streams

'Entrepreneurs' thoughts on international expansion and staying in Edmonton:

- Great transportation hub due to northern location
- Great for biotech
- Great for technology
- Great for artificial intelligence (AI)

"It's very easy. I don't know how to explain. If you know the right people, it's very easy. If you network, if you know the right people, if you get the right jobs, it's not hard."

"So, I found in Edmonton, part of the nice thing was it didn't matter who you knew. If you work hard, and you're dedicated, and you keep working, you'll be able to succeed at something. Rather than having to have the right family name, or the right connections."

"Edmonton's the touching point for pretty much anything north. So if you are looking to expand, it is a great transportation hub."

EDMONTON PRIDE

When 'Entrepreneurs' tell people they live in Edmonton, here is what people say:

- "Well why don't you live in Calgary?" - Calgary has done a better job of marketing- Stampede known worldwide
- "Is it really winter all the time up there?"
- "Do you really have all those outdoor festivals?"
- Experience with Americans- they don't know much about Edmonton
- Ask about mountains
- Know the Oilers
- Think of Alberta in general, not Edmonton specifically
- "Do we live in igloos?"
- "Wow, why don't you move to Toronto?"

What 'Entrepreneurs' feel Edmonton's strengths are:

- Perseverance
- River Valley
- Festival- second largest Fringe Festival in North America
- Loyalty
- Food scene- lots of restaurants, lots of ethnic restaurants
- Diversity
- Diverse arts community
- Standard of living
- Working class city- want to work
- People are open-minded
- Everyone accepted

"We have it, we keep growing. We add things like- let's make this a festival city, let's add green, let's add quality of life, rather than relying exclusively on monetary ways to give ourselves value."

"Lots of places to see and be seen."

CHALLENGES

The structural limitations of Edmonton towards 'Entrepreneurs' being more successful:

- Preconceived notions
- Too much urban sprawl
- City is a pushover for business wanting to leave

'Entrepreneurs' opinions on Vision 2050:

- Better promotion of bike paths- too focused on drivers
- Need more education- more schools to account for more people
- Blatchford field- nothing seems to be happening

VISION

'Entrepreneurs' dream city:

- Smaller city with a substantial population
- More of a four-season climate / warmer
- Growth and opportunities for small businesses
- Lots of open green spaces
- Places to play
- Convenient transit- able to get around easily / bullet-train
- Strong arts, culture, music
- No or little poverty
- No homelessness
- Safe- little crime
- Harmony- everyone gets along
- No ethnic strife
- No political strife
- Ability to find business opportunities

- Variety of industries and opportunities
- Good shopping
- Less litter
- Better sports teams
- Better concerts
- Higher disposable income
- Fast-growing
- Culturally diverse
- Affordable
- Promotes strengths and diversity
- Promotes different businesses
- Less red tape for permits and development
- Less potholes
- No calcium chloride on roads
- Good employment opportunities
- Fun

How close, or how far, do 'Entrepreneurs' feel Edmonton is from fulfilling their dream city?

- All but weather
- Choosing a few at a time and doing them well

"Making sure that what we do tackle, we tackle well."

ELEVATOR PITCH

That Edmonton is the city which they should move to...

“Come to Edmonton to experience success, prosperity, opportunity, and stay for a healthy, green existence. A fun-filled, festival life. Edmonton. Work to live, don’t live to work.”

“Community, diversity, business opportunity. Worker’s commitment to diversity. Open to idea, thoughts, and innovations. Entrepreneurship. Pipelines. Less congested. Good night life. Green space everywhere. A community that cares about it’s people.

“So you spend 8 to 12 hours a day working, but what do you spend the rest of your time doing? There’s art, recreation, family-centric and there’s more than you know. A place to work, a place to play, a place to lay your head. And you will fit in just fine.”

CHANGED PERCEPTIONS ON EDMONTON

Things discussed that have changed the way 'Entrepreneurs' think about Edmonton:

- Reinforced not changed
- Discussed how often diversity came up during the discussion, and how little money came up

"We're a city of priorities, I think is what it's showing. Really comes back to work to live, not live to work. Alberta's seen as a live to work province. This city is about working to live."

"The whole 'be your best self' thing. And I think we could be really good at going, 'if this is what your values are, this is where you belong.' Not Calgary, not Fort McMurray, not Vancouver. This is where you belong if this is what you believe, because we believe it too."

BUILD YOUR BRAND

DETAILED RESULTS

IN-DEPTH INTERVIEWS

STAKEHOLDERS GENERAL IMPRESSIONS OF THE CITY OF EDMONTON

Edmonton's unique selling proposition:

- One of the youngest demographics
- Fastest growing city
- Strong post-secondary
- Affordability
- Quality of life- value for money, housing costs, commute times
- Current place brand promise
- Welcoming
- Create our own solutions
- Cooperation
- Collaboration
- Opportunities
- Willingness to help
- River Valley
- Vibrant
- Northern city- Gateway to the north

- Risk-takers
- Get things done
- Humble
- Educated and engaged citizenship
- Lots of entrepreneurship and big ideas
- Size
- Airport
- Sense of community
- Diversity
- Post-secondary institutions
- Pioneering spirit
- Health facilities
- Resilient

"I don't think we are taking advantage of the fact that as a province we have two large metro cities, and we should use that to our advantage. We could have more of a market presence and pure mass together."

"Edmonton is where you take an idea and make it real."

"You can do whatever you want in Edmonton, limited by your own ambitions. There are a lot of opportunities in the city, and people are willing to help."

"Take a risk, it's the most Edmonton thing you can do."

"There is a truly unique cultural heritage to the city, always had an eclectic flair, and enormous can-do pioneering spirit."

STAKEHOLDERS GENERAL IMPRESSIONS OF THE CITY OF EDMONTON

Cities and/or regions Edmonton competes with:

- Every city in Canada- compete on post-secondary, innovation, quality of life
- Toronto, Vancouver, Montreal- all have more international recognition/awareness
- Every city globally
- Doesn't have a lot- people come because of work, as long as there are opportunities people will continue to come
- Calgary- entertainment, more in our mind than reality
- Denver
- Boulder
- Waterloo
- Competing for students
- Self-contained

What does Edmonton need to do?

- Edmonton needs to work with Edmonton Global to get a more metro Edmonton brand
- Should be working towards more of a partnership with Calgary than a competition
- Stop comparing to Calgary
- Position as a leader in Artificial Intelligence
- Leverage our academics- biggest competition in the world, have expertise in a wide range of disciplines
- Keep our students here

“The cost of our ‘homegrown’ attitudes is that we don’t take the time or energy to build relationships with other cities. Too focused on Calgary, which is a waste of time. Our audience should be international, not just national.”

“Shouldn’t try to compete with Montreal, Toronto, Vancouver, need to build relationships internationally that push us on the map in a different way. Pushes our business community to aspire to more than just the location where we are.”

STAKEHOLDERS GENERAL IMPRESSIONS OF THE CITY OF EDMONTON

Edmonton's biggest strength:

- Artificial Intelligence capabilities
- Commitment to health and life sciences
- Benefit of migration- have had a huge influx of people due to economy, specifically come the 'liquid gold' age cohort (18-35 years old)- they are the economic stimulators
- Affordability
- Career opportunities
- High standard of living
- Can do anything in Edmonton
- Talent trumps seniority
- Teaching hospitals
- Post-secondary institutions
- Growing culinary scene- craft brewing
- Vibrant arts and culture
- Diversity- immigrant population
- Post-secondary institutions

- Humility
- Collaborative spirit
- Sense of community
- Athletics
- Festivals
- Amenities
- Beautiful city
- Location- northern most city of substantial size
- Thrives no matter what the conditions
- Arts community
- Fearless / boldness
- People

"If you are good at something, Edmonton will let you run wild. If you are good at your job and hard working, people in this city will let you do what you want to do and they will support you."

"We are grit and grind. If you got it, you can make it big in this city."

"Still a small big city. Big population size, but operate like a small city with a community feel."

STAKEHOLDERS GENERAL IMPRESSIONS OF THE CITY OF EDMONTON

Characteristic Edmonton can most exploit:

- Young and talented
- Success stories- Landmark Homes
- Livability – museum, art gallery, theatre, music
- Being a leader in health and health innovation
- Artificial Intelligence
- Look into being a leader in cannabis
- Look into being a leader in plant-based products
- Ability to take risks and be nimble
- Vibrancy of city
- Northern connectiveness- more and more the cost of shipping is becoming an advantage

“We haven’t told our story enough. We need to talk about all these different things, even if not that much is different than any other city. We just haven’t told our perspective enough.”

STAKEHOLDERS GENERAL IMPRESSIONS OF THE CITY OF EDMONTON

Edmonton's biggest weakness:

- If able to operate as a more agile city- need to be able to make decision quicker, council currently does not operate that way
- Lots of backlog of infrastructure investment- roads not up to par, buildings need investment
- City invests in infrastructure they shouldn't- race track, coliseum lands- they should be looking to private industry for those types of investment
- 'Globalnessness'- don't have a global view, very little visibility in a world context
- Don't have a community narrative
- Word of mouth
- West Edmonton Mall as claim to fame
- Seen as isolated
- Deadmonton
- Compares too much to Calgary
- Too defined by having government here
- Not telling our story well enough

- Crisis of confidence
- Public transportation- working to improve
- Location- darkness, cold, hard to adapt for some
- Not pushing / challenging
- Falling behind in Artificial Intelligence
- No heart to the downtown- not enough of a community living downtown, need to add more of what people need to live comfortably downtown, create a sense of community other than work life 9-5

"I don't understand the turn-around on things. Things seem to go back and forth a lot. There seems to be an unwillingness to invest in things that could make our quality of life better. For example, the River Valley, look at Austin, we should compare ourselves more to them, there seems to be a Riverfest everyday, there is access for the public for water usage."

"We hear too much of bureaucratic issues, need to be better at telling success stories."

"Sometimes in Edmonton we suffer from we aren't this or that. We need to be more proud of it."

"At the moment it feels like we are aiming for nothing."

"I think we think too small, we don't think big, we should have the biggest economic forum on Artificial Intelligence."

OUTSIDE PERSPECTIVES OF THE CITY OF EDMONTON

Others perceptions of Edmonton in 'Stakeholders' experiences/interactions:

- Surprised by thriving eco-system
- Interesting...tell me more...
- Not viewed as very livable- grow our own talent rather than attract
- Don't see our rapid growth- don't believe it
- Don't realize how diverse Edmonton is
- Have to justify living in Edmonton
- Not aware of all Edmonton has to offer- such as culinary scene
- Cold
- Hill-billy
- Carbon hogs
- Hockey
- West Edmonton Mall
- Think Edmonton is Calgary
- Surprised by everything that is going on
- Surprised by how kind, open, and helpful people are

"Don't think we register much on large, but in context, not much of Canada other than Toronto does, but I do think the brand promise of Edmonton is important. Not everyone needs to be Silicon Valley, London, New York, Beijing. You don't need to be top 10 in the world, you can build a great community that can still compete on a global level."

"We need to be leading with a Canadian context, and what is happening in Alberta, and a unified voice about what is happening here. Edmonton is not enough- add Industrial Heartland, getting better, add Nisku and Parkland, getting there. Edmonton by itself doesn't do it. Need the network."

ATTRACTING TALENT AND/OR INVESTMENT

Cities and/or regions Edmonton should look to for inspiration on attracting talent or investment:

- Austin- through leading in technology and innovation, similar size, culture focused
- Pittsburgh- reinventing through food scene, cultural perspective
- Toronto- focus on attracting coding talent
- Need to stop looking to others
- Vancouver
- Waterloo- based on the world of tech- internationally known for what they do and are tiny
- Boulder- smaller community but attracting lots of attention
- European cities- much older than Edmonton but still making changes, look to see how they are making changes, Netherlands
- Montreal
- Silicon Valley
- Singapore
- Shanghai

The next generation workforce looks like...

- Multiple career experiences
- New definitions / new roles
- Mobile workforce
- Customized- want choices based on life experiences and requirements
- No longer long-term mind frame
- Flexibility
- Hyper-informed- raised in a world with unlimited information
- Extremely diverse
- Working with Artificial Intelligence
- Being able to use data
- Will need to create and imagine
- Entrepreneurs / small business owners
- Well educated
- Dynamic
- More interested in travel

“Just because you can attract talent, doesn’t mean you can attain it. Need to offer rich diversity of entertainment to make them want to stay.”

“We don’t need to emulate anyone, I dislike our inferiority complex, it limits us. We curl up when people have negative perceptions and wish we were Calgary, we need to persevere and stop apologizing, we need to be proud of ourselves.”

“The next generation workforce is going to want flexibility around when they work and where they work, more interest in travelling, need a great home base, but may not be their permanent base. Really interested in experiences, inclusive opportunities, experience within work and community.”

ATTRACTING TALENT AND/OR INVESTMENT

What Edmonton needs to do to position itself as a workplace destination of the future workforce:

- Focus on legacy investments
- Promote Edmonton's affordability
- Make downtown a good place to live not just work- people need parks, schools, grocery stores, alternative forms of transit
- Mindful that energy economy will remain but will change
- Meet employment demands
- Continue to absorb the ups and downs
- Focus on livability
- Tell our stories
- Need to find a way to keep students in Edmonton
- Promote multiple career opportunities
- Promote flexibility
- Not just oil and gas- focus on health and Artificial Intelligence
- Variety of work environments- shared space, coffee shops
- Bike lanes important

- Take a regional approach
- Double, triple down on Artificial Intelligence
- Be more aggressive

"Should avoid labels, defy definition."

"Positioning around the opportunities in many more sectors with the opportunities to grow in multiple careers with the combination of the flexible options for places to live. Mix of things people need."

"Have the perspective that this is global in nature instead of prairies."

CITY AND STAKEHOLDERS ROLES

What the City's role should be when it comes to building out Edmonton's brand to maximize its attractiveness to both people and businesses:

- Providing great infrastructure
- Focus on marketing liveability and quality of life
- Need to get out of our own way
- Can't be fully accountable and fully transparent
- Corporate brand promise needs to support the place brand promise
- Need to be ambitious
- Leader in confidence in Edmonton
- Support endeavours
- Work with citizens to become excited about Edmonton
- Provide a common message
- More engagement, respect for public space
- Increase social awareness and understanding
- Facilitator
- Enabler

- Stable foundation

What 'Stakeholders' role should be when it comes to building out Edmonton's brand to maximize its attractiveness to both people and businesses:

- Brand ambassadors- local, national, international
- Get in leadership roles
- Tell our story as to why Edmonton
- Have active partner networks
- Be unified
- Collectively aggressive

"We are comfortable in following someone with a dream and a bit of passion, not a lot of places will do that. People will rally around you in this city, we are a weirdly non-competitive environment."

"Figure out the city brand, and work with organizations, like post-secondaries, to have a common message."

"City can be an incubator in and of itself, and the procurement processes really hamper start-ups. They need to figure out a way to open that up so the City can be a source of that innovation and be a test bed."

ADVICE AND FINAL THOUGHTS

Advice for the City on current challenge:

- Focus on the brand promise
- Be ruthless on the reputation side- be Edmonton's biggest fighter
- Be less cautious and risk adverse
- Be bold
- Don't be apologetic
- Don't try to mimic others
- Stop consulting on everything
- Start with Edmontonians
- Keep it simple
- Stop comparing to others
- Leverage unique qualities
- Challenge the community to create it

Other final thoughts from 'Stakeholders':

- Don't discredit current brand promise
- Culture needs to change from council to administration- too much fear of change
- Redesigning a brand as an advertisement isn't going to do it
- Be authentic

"Be bold, don't be apologetic, don't try and do it the way someone else has done it. Stop consulting people to death, and just take the plunge. You won't always be right, but just be bold and things will start to stick. Be true to ourselves, we are a pretty remarkable place."

"Don't be afraid to dream big. Don't shy away from exciting Edmontonians first, and focusing on Edmontonians first, to catch that passion, that wave. Listen to Edmontonians, there needs to be a little more listening going on."

"Create a brand from the inside out."

"The brand is what we are, can't be contrived into something different, my caution is a lot of work has been done on the community brand promise, and while it may not be snappy, that's not of value. It's about the truth of the words. If you stick to the truth about yourself that resonates more than the aspirations of look how pretty we are, you should come join us and be pretty too- nothing there."

"Not just a service station for Jasper."

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