



# Mountain View Region Case for Tourism and Strategic Recommendations

Final Report: October 29, 2021



# expedition

MANAGEMENT CONSULTING

October 29, 2021

Doug Wagstaff  
Acting Director, Operations  
Town of Olds  
4512 46 Street  
Olds, AB  
T4H 1R5

Dear Mr. Wagstaff,

Please find enclosed the final Mountain View Region Case for Tourism and Strategic Recommendations report. We look forward to learning about your successes in implementation.

If you have any questions or require clarification on the attached report, please feel free to contact me at 780-266-7888.

Sincerely,



Justin Rousseau, Managing Director  
Expedition Management Consulting Ltd.





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# Executive Summary



## EXECUTIVE SUMMARY

The Mountain View region stretches from the Eastern Slopes of the Canadian Rockies to the open prairie in Central Alberta. The region is home to approximately 35,000 residents who have chosen to live in the area's diverse urban and rural communities, including the Towns of Olds, Didsbury, Carstairs, and Sundre, the Village of Cremona, and Mountain View County. The region is situated on the traditional territories of the people of Treaty 6 and Treaty 7. This area is also home to the Métis Nation of Alberta, Region 3.<sup>1</sup>

In the Mountain View region today, tourism is an industry with significant latent potential. The region has seen some success in the areas of sport tourism, nature-based tourism, festivals and events, cultural tourism, culinary/agritourism, business tourism, and visiting friends and relatives tourism. However, the region lacks a focus on tourism development, which has made it challenging for the industry to grow.

### Project Purpose

The purpose of this report is to establish a case for investment in tourism and provide broad strategic recommendations related to encouraging tourism development in the Mountain View region.

### Tourism Defined

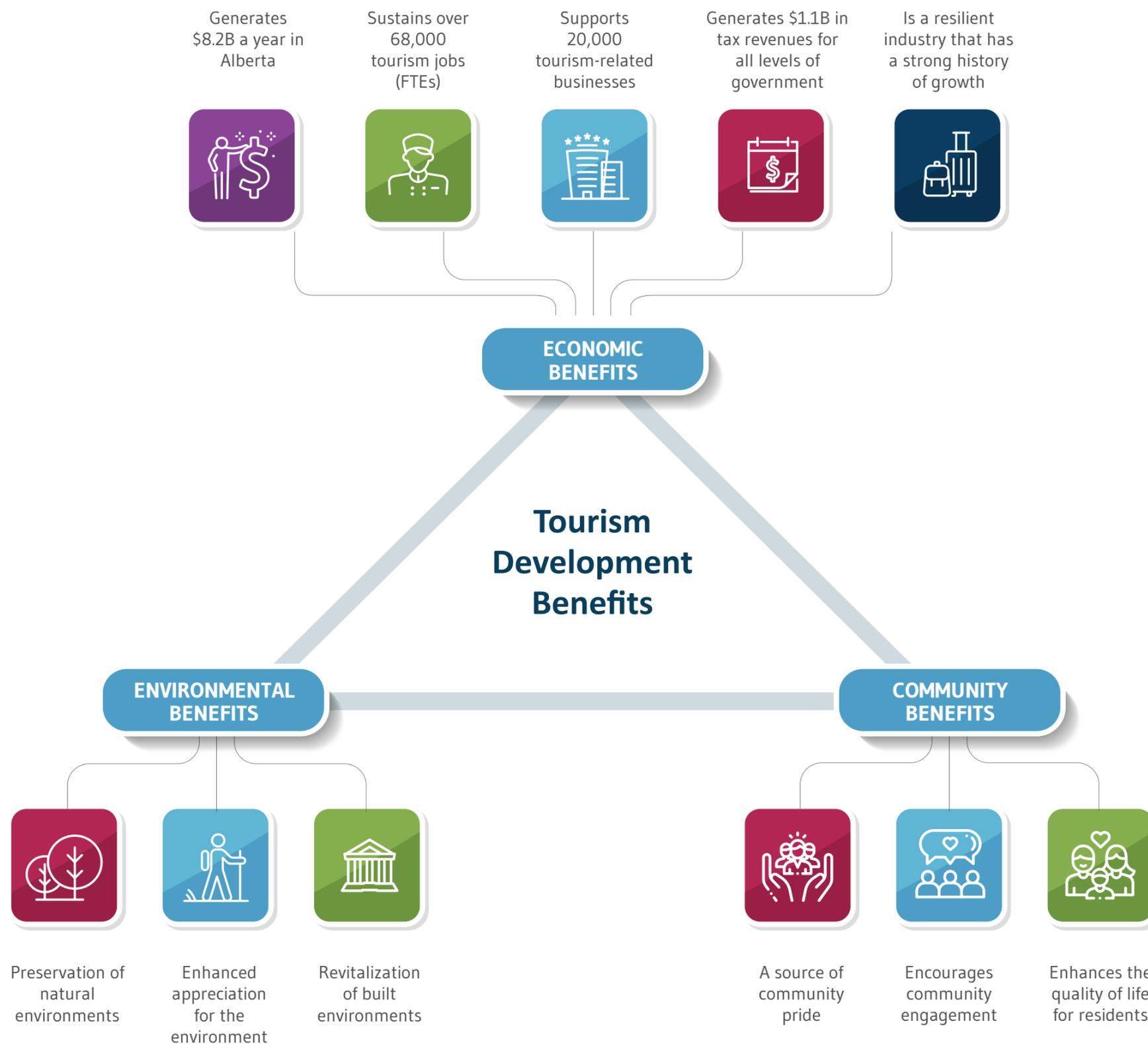
Tourism is a dynamic and competitive industry. For the purposes of this report, tourism can be broadly defined as:<sup>2</sup>

***“The activities of people travelling to places outside their usual environment for leisure, business or other purposes for not more than one consecutive year.”***

Using the North American Industry Classification System, we can further define tourism as an economic sector made up of the following five industries: Accommodations, Food & Beverage, Recreation & Entertainment, Transportation, and Travel Services.

### Case For Investment

There are many reasons to invest in tourism development as described in the figure below.



### Why Invest?

The tourism industry is already providing a multitude of benefits to the Mountain View region. Given the limited state of tourism development, there is strong potential for tourism to generate far greater benefits. The Mountain View region’s central location, access to large markets, support from stakeholder groups, and wide variety of assets and product offerings present a significant opportunity for tourism development.

*The region’s central location, access to large markets, support from stakeholder groups, and wide variety of assets and product offerings present a significant opportunity for tourism development.*

Strategic investments in tourism will help the industry flourish, while simultaneously supporting other industries in the Mountain View region for years to come. This will result in enhanced economic, community, and environmental benefits for the community.

### Tourism Opportunities in the Mountain View Region

Seven broad opportunities for tourism development were identified through the research process. These opportunities show high potential for development in the short to medium term in the Mountain View region.

- |   |          |                                 |   |          |   |
|---|----------|---------------------------------|---|----------|---|
|  | <b>1</b> | <b>Sport Tourism</b>            |  | <b>5</b> | <b>Agritourism/<br/>Culinary Tourism</b>              |
|  | <b>2</b> | <b>Nature-Based<br/>Tourism</b> |  | <b>6</b> | <b>Business Tourism</b>                               |
|  | <b>3</b> | <b>Festivals<br/>and Events</b> |  | <b>7</b> | <b>Visiting Friends<br/>and Relatives<br/>Tourism</b> |
|  | <b>4</b> | <b>Cultural Tourism</b>         |   |          |   |



## Strategic Recommendations

This report puts forward strategic recommendations that, when implemented, will support the growth of Mountain View’s visitor economy.



**1** Develop a Tourism Product Development Plan



**2** Develop a Regional Tourism Strategy



**3** Establish a Regional Tourism Development Task Force



**4** Explore the Opportunity to Host the Alberta Games and Other Sports Events



**5** Implement the Mountain View Regional Parks, Recreation and Culture Master Plan



**6** Undertake Regional Collaborative Marketing



**7** Facilitate Tourism Training



**8** Identify Tourism as a Priority Sector for Development



**9** Fund Tourism Development

## Conclusion

This document provides a starting point for the region to invigorate its tourism development efforts and the municipal partners are well positioned to do so. Investment in tourism now will set the region on a path towards developing a dynamic and diversified visitor economy that provides a host of sustainable economic, community, and environmental benefits to the region.



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# Project Overview

The Mountain View region stretches from the Eastern Slopes of the Canadian Rockies to the open prairie in Central Alberta. The region is home to approximately 35,000 residents who have chosen to live in the area’s diverse urban and rural communities, including the Towns of Olds, Didsbury, Carstairs, and Sundre, the Village of Cremona, and Mountain View County. The region is situated on the traditional territories of the people of Treaty 6 and Treaty 7. This area is also home to the Métis Nation of Alberta, Region 3.<sup>3</sup>

In the Mountain View region today, tourism is an industry with significant latent potential. The region has seen some success in the areas of sport tourism, nature-based tourism, festivals and events, cultural tourism, culinary/agritourism, business tourism, and visiting friends and relatives tourism. However, the region lacks a focus on tourism development, which has made it challenging for the industry to grow.

### Project Purpose

The purpose of this report is to establish a case for investment in tourism and provide broad strategic recommendations related to encouraging tourism development in the Mountain View region.

### Process

This report was developed in conjunction with the Mountain View Regional Parks, Recreation and Culture Master Plan. A draft report was developed and reviewed with the Project Steering Committee to collect feedback that was used to prepare the final report.

### Project Team

The Project Steering Committee was established to oversee the project, provide input, and give feedback on the overall direction of the report. The report was developed by Expedition Management Consulting Ltd.

Project Steering Committee	
Organization	Representatives
Committee Members	Doug Wagstaff – Town of Olds (Project Manager) Michelle LaRoche – Town of Olds Terri Sperle – Town of Olds Nicole Aasen – Town of Didsbury Kirk Williscroft – Town of Carstairs Jon Allan – Town of Sundre Jennie Thompson – Village of Cremona Pam Thomas – Mountain View County
Expedition Management Consulting Ltd.	Justin Rousseau (Consulting Team Lead) Maxwell Harrison Drew Ziegler Erin Pote





## Overview of Research

A variety of primary and secondary research activities were conducted to develop this report. Primary research was gathered through interviews and observations from the consultant team. Secondary research was gathered from municipal, provincial, and national data sources, information requests of the Client, a review of relevant literature, and an online review.

The following organizations and individuals provided input through one-on-one interviews.

- Sport, Physical Activity and Recreation Branch of the Government of Alberta (Alberta Games) – Darrell Joy, Sport Development Consultant for Multisport Games and Dave Turnbull, Alberta Games Consultant
- Carstairs Heritage Museum – John Cole, Manager
- Town of Didsbury – Phil Boucher, Economic Development Officer
- Mountain View County – Natalie McKay, Economic Development Officer
- Town of Olds – Sandra Blyth, Economic Development Officer and Larry Wright, Strategy and Technology Officer
- Town of Sundre – Jon Allan, Economic Development Officer

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# Case for Investment in Tourism



There are many economic, community, and environmental benefits to be gained through investment in tourism. This section provides a definition of what tourism is, as well as a brief overview of the benefits tourism can bring to the Mountain View region.

## What is Tourism?

Tourism is a dynamic and competitive industry. For the purposes of this report, tourism can be broadly defined as:<sup>4</sup>

*“The activities of people travelling to places outside their usual environment for leisure, business or other purposes for not more than one consecutive year.”*

Using the North American Industry Classification System, we can further define tourism as an economic sector made up of the following five industries: Accommodations, Food & Beverage, Recreation & Entertainment, Transportation, and Travel Services.



## Alberta’s Tourism Industry

Alberta’s tourism industry is often referred to as an “industry of industries.” It is comprised of all businesses, organizations and individuals that provide services and experiences to travellers. Tourism plays a vital role in the continuing economic success and development of Alberta and makes a significant contribution to the economic and social vitality of communities throughout the province.<sup>5</sup> Specifically, tourism has significant strategic value to the province and the Mountain View region for the following reasons:<sup>6</sup>



**Tourism is an economic platform** – Tourism crosses many sub sectors (transportation, food and beverage, recreation, culture) and has a broad and diversifying effect on the economic base of the province. A significant number of tourism operators are small and medium-sized businesses with many being family owned and operated.



**Tourism supports jobs** – Visitors spend money at campgrounds, hotels, restaurants, gas stations, grocery stores, and retail stores in the region. This is new money for small businesses that create jobs for residents.



**Tourism has growth potential** – Research has demonstrated that both domestic and international visitors have an increasing, and strong interest in visiting Alberta destinations.



**Tourism drives infrastructure** – Tourism can be the catalyst needed to invest in the built infrastructure that makes for great places to live and visit (e.g. parks, pathways, public art, signage and other amenities).



**Tourism contributes to the awareness and positive image of communities in the global marketplace** – Tourism can enhance the reputation and awareness of communities on a worldwide basis. Tourists are potential investors and can become valuable ambassadors for business development and talent attraction in the Mountain View region.

## Economic Benefits of Tourism

There are many economic benefits of tourism as tourism brings visitor dollars into the Mountain View region. Visitor spending is “new” money that circulates throughout the local economy, multiplying its benefit. Additionally, tourism can expose the Mountain View region to potential investors and homeowners. In some cases, tourists enjoy their visit so much that they choose to stay.

The tourism industry is a significant economic driver throughout the Province. On an annual basis, the tourism industry in Alberta:<sup>7</sup>



**Generates \$8.2 billion in tourism expenditures.**



**Supports 20,000 tourism-related businesses.**



**Sustains over 68,000 tourism jobs (full time equivalent employment in person years).**



**Generates \$1.1 billion in tax revenue for municipalities, the province, and the federal government.**

## The Visitor Economy

The visitor economy refers to the widespread and often unseen benefits communities receive from dollars spent by travellers. Tourism is more than just a business sector; it is an economic driver that crosses multiple industries and supports growth in multiple ways. Here is an illustration:<sup>8</sup>

A family travels to the Mountain View region to take part in a sporting event. They purchase fuel, stay in a local accommodation, and purchase food from local restaurants and grocery stores. This is the “direct” impact of the visitor economy: local businesses receive money from tourism spending.

As a result of this spending, the businesses offering these services are able to make a profit and hire more staff. This “indirect” impact of tourism spending produces a multiplying effect as an economic driver by increasing wages, salaries, and profits. Also, as more visitors come to the community, more work is generated in the supply chain, as wholesalers, food and beverage suppliers, tour planners, retailers, manufacturers, etc., are called upon to meet customers’ demands.

The new employees hired by the tourism industry now have money to spend on clothes, food, transportation, entertainment and to pay taxes. This is the “induced” impact of the visitor economy. The ripple or spillover effects of this induced impact are felt as income, and taxes are spent throughout the province on housing, education, transportation, infrastructure, energy, communication, health care and other personal expenditures.

The end result is that tourism dollars circulate throughout the economy, amplifying their impact along the way, resulting in support for community building and economic well-being.

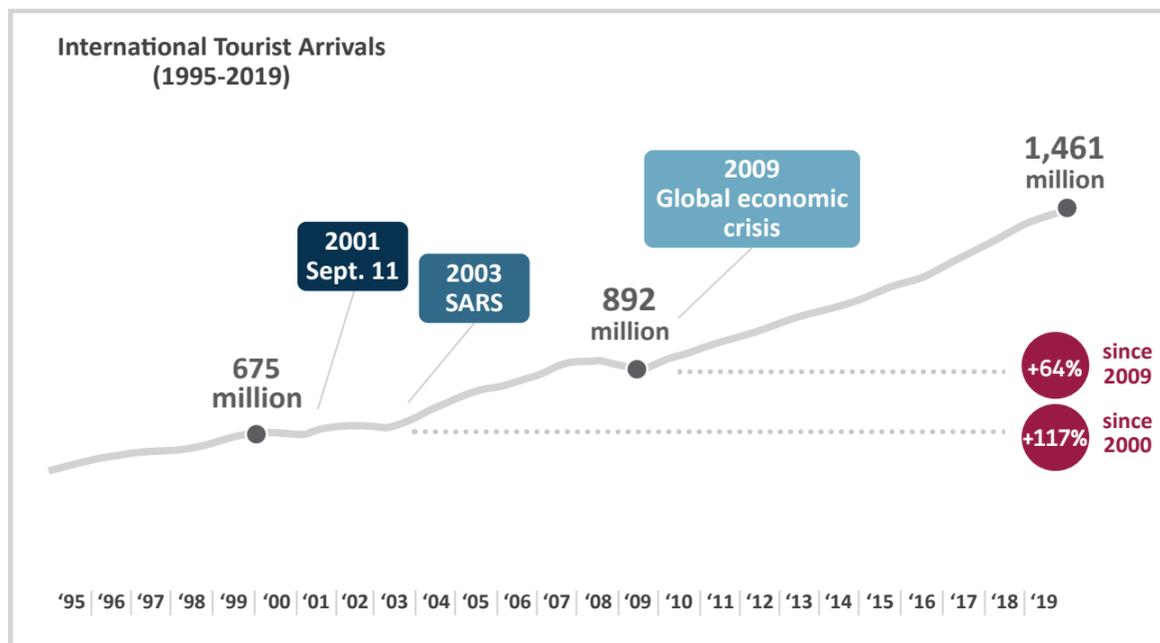
*The end result is that tourism dollars circulate throughout the economy, amplifying their impact along the way.*

## Resiliency of Tourism

The COVID-19 pandemic is unprecedented and tourism has been one of the most negatively affected sectors.<sup>9</sup> The full impacts of the crisis cannot be known at this time, although, it is clear that significant recovery efforts will be needed. As the world responds to and recovers from this global health emergency, the tourism sector will need to evolve.

It is important to note that as a global industry, tourism has a strong history of growth and has been proven to be resilient through significant crises and events. International tourism has seen continued expansion over the past few decades, despite occasional shocks. In the past 20 years, international tourist arrivals have risen from 675 million in 2000 to 1.5 billion in 2019. This dramatic growth demonstrates the sector’s strength and resilience (see Figure 1).<sup>10</sup>

**Figure 1.** Global Tourism Growth and Resiliency Through Economic Shocks



## Community Benefits of Tourism

Tourism has the potential to provide compelling community benefits for the Mountain View region, as well. While the benefits are multiple and varied, tourism can provide the following:<sup>11</sup>



**A source of community pride** – Celebrating local culture and sharing it with the world can be a significant source of pride for communities, individuals, and cultures.



**Capacity to encourage community engagement** – Tourism can provide opportunities for individuals within the community to become engaged through business, volunteerism, event/activity execution and interpretation of local culture.



**Enhancements to the quality of life for residents** – Communities that embrace tourism can often justify enhancements to programs, events, facilities, and infrastructure well beyond what could be achieved without a stable source of external revenue flowing into the community. These enhancements often serve to increase the quality of life for residents.

## Environmental Benefits of Tourism

The tourism industry is also capable of contributing to the preservation and revitalization of natural environments. When a destination’s unique characteristics (e.g. untouched wilderness, landscapes, authentic history) are leveraged as tourism products, they acquire an enhanced value that goes beyond solely economic considerations. Travellers experience an emotional connection to the places they visit, while residents find a new-found significance for places that they may have taken for granted before. The addition of such values provides the impetus to further protect natural environment and, in some cases, enhance them.

## Tourism Development Risks

As previously discussed, there are many economic, community, and environmental benefits to be gained through tourism. However, there are also potential risks to tourism development that should be considered when embarking upon tourism planning. It should be noted that the probability and severity of risks associated with tourism development closely depend on the characteristics of each destination and the type of tourism activity it attracts. The good news is that destinations throughout the world have proven that with proper management, these risks can be mitigated and, in some cases, eliminated.

Some potential risks associated with tourism development can include:

- **Seasonality** – Tourism can occur during a limited time window, which can reduce the opportunity for benefits and potentially magnify other risks.
- **Economic leakage** – Visitor spending flows outside the community to non-local or foreign-owned businesses.
- **Price Increases** – High spending visitors can cause price increases for locals (e.g. goods and services, rents, housing prices).
- **Negative community impacts** – Increased visitation can lead to increased crowding and traffic, resident/visitor conflicts, or a loss of community identity.
- **Negative environmental impacts** – Increased tourism can result in harm to the environment (e.g. depletion of resources, human-animal conflicts, pollution, increased waste, etc.).
- **Cultural commodification** – Important aspects of a community’s cultural identity can be lessened by transforming it into a marketable good for sale to tourists.

## Why Invest?

The tourism industry is already providing a multitude of benefits to the Mountain View region. Given the limited state of tourism development, there is strong potential for tourism to generate far greater benefits. The Mountain View region’s central location, access to large markets, support from stakeholder groups, and wide variety of assets and product offerings present a significant opportunity for tourism development.

*The region’s central location, access to large markets, support from stakeholder groups, and wide variety of assets and product offerings present a significant opportunity for tourism development.*

Strategic investments in tourism will help the industry flourish, while simultaneously supporting other industries in the Mountain View region for years to come. This will result in enhanced economic, community, and environmental benefits for the community. A conceptual model of how these benefits come to be is provided in the Destination Management Cycle (see next).



Source: Travel Alberta. (2018).

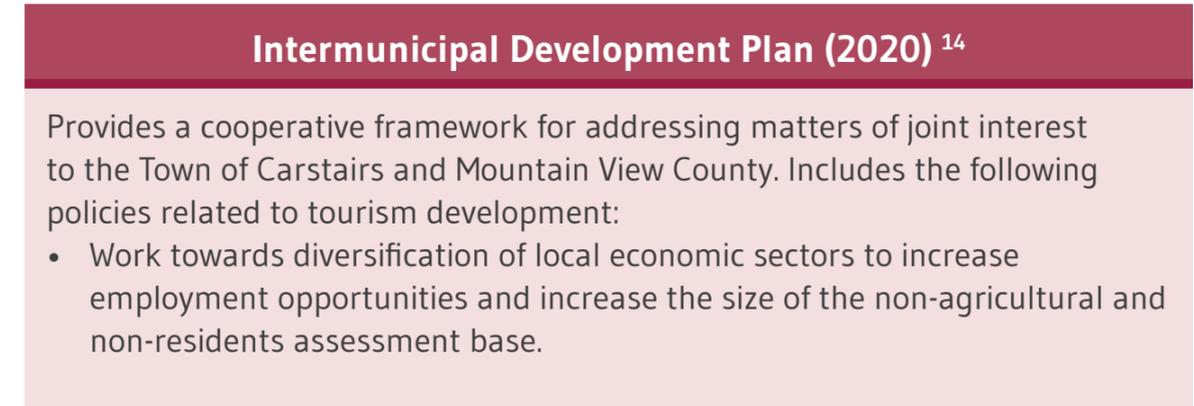
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# Strategic Planning Linkages

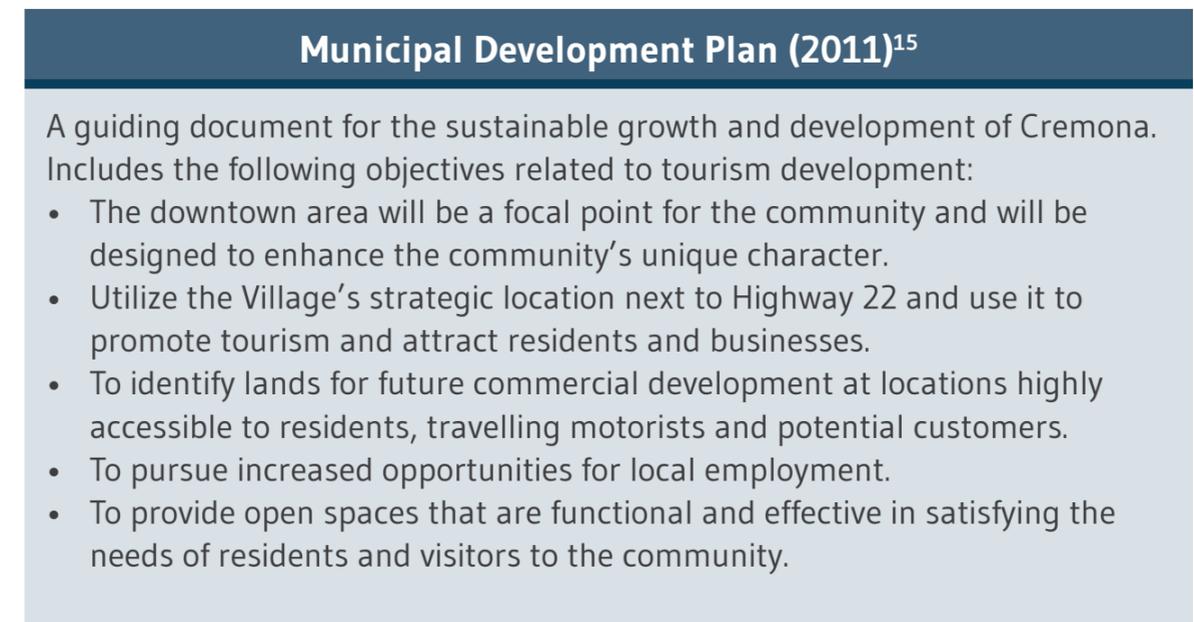


None of the communities in the Mountain View region, including the region as a whole, have a formal tourism development strategy or plan. Although, tourism development was found to align with existing municipal planning in the region. The following figures describe these linkages.

**Figure 2.** Carstairs Strategic Alignment Summary



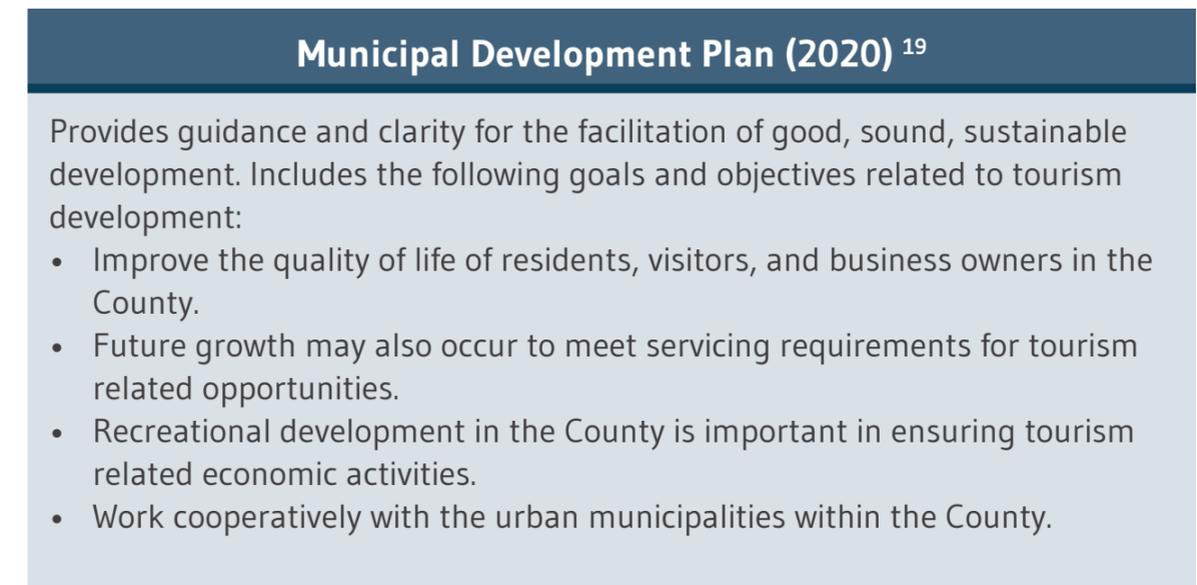
**Figure 3.** Cremona Strategic Alignment Summary



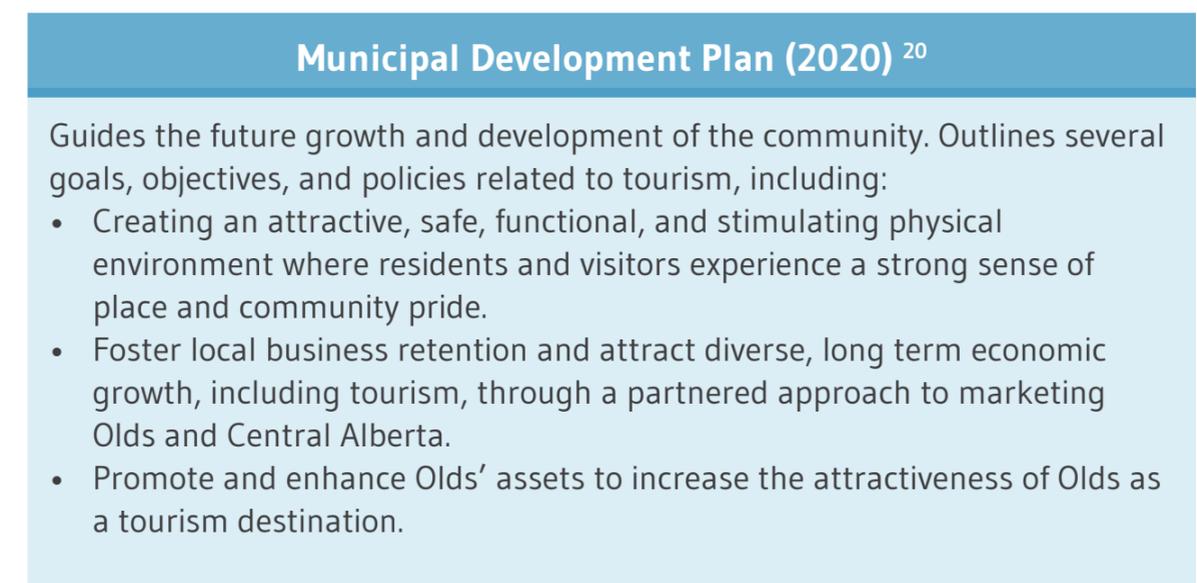
**Figure 4. Didsbury Strategic Alignment Summary**



**Figure 5. Mountain View County Strategic Alignment Summary**



**Figure 6. Olds Strategic Alignment Summary\***



### Intermunicipal Development Plan (2020) <sup>21</sup>

Provides a policy framework for planning matters requiring coordination between the Town of Olds and Mountain View County, including the following goals related to tourism:

- Reinforce and enhance the positive and mutually beneficial relationships between the Town and County recognizing that the Town and surrounding rural areas function as one diverse, mutually supporting community.
- Diversify local economic sectors to increase employment opportunities and increase the size of non-agricultural and non-residential assessment base. Tourism shall be strongly encouraged.

### Heritage Management Plan (2010) <sup>22</sup>

Guides the stewardship of the Cultural and Historic Resources of the Town of Olds, including the following goals related to tourism development:

- Promote public awareness, understanding, and appreciation of Designated Municipal Historic Resources and other identified historic resources.
- Encourage economic development through heritage and cultural tourism.

*\*In 2020, the Town of Olds approved a policy to coordinate and invest in a tourism strategy as a component of an overall economic development strategy.<sup>23</sup>*

**Figure 7. Sundre Strategic Alignment Summary**

### Municipal Development Plan (2013) <sup>24</sup>

A long-term strategic plan for managing the growth of the Town for the next 20 years, including the following goals and objectives related to tourism:

- Further promote Sundre as the gateway to the West Country and encourage development of the tourism industry.
- Encourage the development of tourism, recreation, and culture-related businesses, particularly those that encourage visitors to stay overnight in Sundre.

### Parks, Open Spaces & Trails Plan (2018) <sup>25</sup>

Provides direction on policy regarding parks, open spaces, and trails in Sundre, including the following priorities related to tourism:

- Plan for the development of the Mountain County Shop lands. This parcel has the potential to be integrated into the open space system which can have a positive influence on tourism and overall economic development.
- Develop a central community/district park to provide a hub for recreational activity and community vibrancy. This central park area is envisioned to be a destination park for residents and visitors.
- Residents and visitors shall be offered an integrated transportation system that allows them to explore the Town.



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# Tourism Opportunities in the Region

Broad opportunities for tourism development in the Mountain View region are described in this section.

## Tourism Opportunities in the Mountain View Region

Seven broad tourism opportunities were identified through the research process. These opportunities show high potential for development in the short to medium term in the Mountain View region. Descriptions of the opportunities and market insights are provided next.

### 1. Sport Tourism

#### Description:

Several factors position the Mountain View region well to capitalize on sport tourism development. These factors include strong investments made by communities into sport and recreation facilities, the central location of the Mountain View region in the province, and a track record of hosting successful sport events. Further investment has the potential to spur increased sport tourism, while also serving the needs of residents and enhancing quality of life in the region.

Sport tourism is particularly attractive to pursue because it can generate large spin off effects for local businesses. Athletes, coaches, support teams, and their families spend money on accommodation, food and beverage, fuel and entertainment which supports the local economy. Sport tourism can include ongoing sport-specific competitions that provide a regular stream of visitors into the community or large multi-sport events that can bring in an influx of visitors over a shorter period of time.

#### The Alberta Games

One example of a multi-sport event that the region may consider hosting is the Alberta Games. The Alberta Games bring together thousands of Albertans to participate in and celebrate competitive youth sport. The Games also have the ability to generate significant economic impacts and provide valuable promotional opportunities for host communities.

It would likely be challenging for any single community in the Mountain View region to successfully bid on and host the Alberta Games. However, a collaborative regional bid

would be an attractive offering to Games organizers and potential funding partners. Pursuing the Alberta Games as a region could serve to build regional collaboration between communities, strengthen the linkages between tourism and recreation, and provide an opportunity to showcase the region to the entire province.

In our discussions with the Sport, Physical Activity and Recreation Branch of the Government of Alberta (the branch that governs the Alberta Games) we learned the following in relation to the potential for the Mountain View region to host a Games:

1. The Branch encourages the region to submit a joint bid.
2. The Branch provides assistance in the development of a bid and setting up a local organizing committee.
3. There is flexibility when it comes to meeting the technical facility specifications required to host the Games. For example, none of the aquatics facilities in the region have a 6-lane pool (which is a barrier), but because the region has three pools, aquatic events could still be accommodated.
4. Alberta Games organizers seek hosts who can provide an outstanding athlete experience. Some examples of what this means includes hosting sporting events in high-quality facilities, delivering excellent hospitality, engaging athletes through complementary programming, ensuring short travel distances, and providing sufficient spectator seating.
5. Strong and broad-based support from local sport groups, volunteers, and municipal officials is needed to host a successful Games.

Please see Appendix A for more information regarding the Alberta Games.

#### Market Insights:

1. Sport tourism is a \$5.2 billion industry\* in Canada and is one of Canada's fastest growing tourism sectors. <sup>26</sup>
2. The positive economic impacts of the Alberta Games is well documented. Examples include:
  - a. The 2020 Alberta Winter Games in Airdrie brought in over 12,000 participants, officials, volunteers, families, friends, and visitors, and generated \$1.8 million in visitor spending. <sup>27</sup>
  - b. The 2018 Alberta Summer Games in Grande Prairie attracted 2,800 participants,

family members, and spectators, and generated \$2 million in net economic impact locally.<sup>28</sup>

- c. The 2018 Alberta Winter Games in the Regional Municipality of Wood Buffalo attracted over 6,000 athletes, coaches, officials, and spectators, and generated \$1 million in visitor spending.<sup>29</sup>
  - d. The 2016 Alberta Summer Games in Leduc brought nearly 7,000 athletes, family members, friends, and other supports, and generated over \$1 million in visitor spending.<sup>30</sup>
  - e. The 2014 Alberta Winter Games in Banff and Canmore attracted 8,000 athletes, coaches, officials, spectators, and volunteers, and generated \$2.7 million in visitor and event operational expenditures.<sup>31</sup>
3. Sport Canada provides \$21.6 million annually through its Hosting Program to help communities host world class sport events.<sup>32</sup> The Mountain View region can capitalize on the availability of these funds to grow this emerging sector.
  4. Destination Canada has indicated two of Canada's strengths in attracting millennial tourists include the wide range of major sports events, and exciting sport/outdoor activities. This presents an opportunity for the region to draw an increasing number of sport events to specifically target the millennial generation who tend to stay longer and spend more on visiting local tourist attractions, eating, and drinking.<sup>33</sup>

*\*This figure is pre-COVID.*

#### Available Supports for Sport Tourism Development:

1. Supports are currently in place and organizations are actively working to develop sport tourism as a leading economic driver in the national tourism industry. Sport Tourism Canada partners with communities to position Canada as a world leader in bidding for and hosting major sport events. The organization also markets Canada as a preferred host destination, builds capacity through education and skill development, and helps build investment in communities.<sup>34</sup>
2. The provincial government is dedicated to growing this tourism segment through the Sport, Physical Activity & Recreation Branch of the provincial government. This organization assists organizations, communities, and provincial sport organizations in sport development, high performance sport, and the delivery of sport events.<sup>35</sup>

## 2. Nature-Based Tourism

### Description:

The Mountain View region has an abundance of nature-based tourism assets, including unique landscapes, trails, parks, wilderness areas, rivers, and wildlife viewing. As such, nature-based tourism is a significant driver of visitation to the Mountain View region, particularly in the western portions of the County that has ready-access to the Eastern Slopes of the Rocky Mountains.

The region's nature-based tourism assets can support a wide range of guided and self-directed tourism activities, such as camping, fishing, outfitting, adventure tours, and ecotourism. Comparable destinations have embraced their natural assets by developing and promoting them in categories, by season, and with supporting infrastructure and packaging. The Mountain View region is well positioned to take a similar approach in developing nature-based tourism.

### Market Insights:

1. Albertans spend \$2.3 billion on Crown Land outdoor recreation trips annually and another \$376 million on equipment and related accessories.<sup>36</sup>
2. On average, Alberta outdoor enthusiasts spend \$258 per day trip and \$757 per overnight trip.<sup>37</sup>
3. Alberta is one of the top three most popular locations to visit in Canada by domestic travellers, with hiking and wildlife viewing stated as two of the top three most popular activities.<sup>38</sup>
4. Younger travelers (under 55 years) particularly enjoy adventurous and active pursuits, such as climbing, camping, fishing, hunting, and skiing.<sup>39</sup>
5. The United States is Canada's largest source of visitors with 13.9 million Americans visiting in 2016, which generated approximately 48% of Canada's total international tourism revenues. 24% of these visitors were drawn to Canada because of the scenery and natural beauty.
6. Alberta's nature-based tourism products are in high demand in all regional, domestic, and international markets.<sup>40</sup> This presents an attractive opportunity to enhance this type of product in the region.

7. Hunting and fishing in Alberta is encouraged by Alberta Environment and Parks, as these activities are proven to promote responsible stewardship of Alberta's natural resources, and provide economic, environmental, and social benefits for Albertans.<sup>41</sup> In 2016, there were nearly 300,000 sport fishing licenses and 127,000 hunting licenses sold in Alberta.<sup>42</sup>
8. Providing opportunities for outdoor recreation, tourism and appreciation of Alberta's heritage is one of the Alberta Park system's top three goals.<sup>43</sup>

### 3. Festivals and Events

#### Description:

Collectively, communities in the Mountain View region deliver a large calendar of events on an annual basis. Many of these events are primarily community focused. However, a portion of them do attract visitors and may have potential to be further leveraged as tourism focused events. Therefore, Mountain View has an opportunity to leverage its event hosting capacity to produce more festivals and events that appeal to key visitor markets to drive increased visitation and spending in the region.

#### Market Insights:

1. Millennials are a major audience for events as 75% of these individuals state they value experiences over things. Over half of millennials (53%) are parents and are attending more daytime, family-friendly events on the weekends.<sup>44</sup>
2. 54% of long-haul travellers from the United States enjoy entertainment experiences, and attending food/wine festivals and events.
3. 64% of Canadian pleasure travellers who visited Alberta indicated they attended a festival or fair while visiting the province.<sup>45</sup>
4. The Canadian Festivals Coalition found 12 million people attended 15 of Canada's largest festivals and events contributing \$650 million in GDP to local economies and supporting 15,000 full time jobs nationally. The coalition also found approximately \$260 million in tax revenue is generated for all three levels of government.<sup>46</sup>
5. Major event attendees are drawn to events that impart memorable experiences and moments worthy of sharing, both online and by word of mouth. The appetite for interactive, and immersive events is growing among young generations that crave authenticity and originality.<sup>47</sup>

### 4. Cultural Tourism

#### Description:

Cultural tourism has emerged as a growing trend over the past decade. Tourists are seeking Cultural Enrichment Travel whereby they participate in experiences that fully immerse them in local cultures so they can leave educated and inspired.<sup>48</sup> People from all over the world are now travelling to create meaningful connections with the places they visit. This presents an opportunity to develop visitor-facing programming focused on the culture of the region that will help achieve tourism goals.<sup>49</sup>

The Mountain View region has maintained a strong connection to its past through a variety of historical resources and infrastructure such as museums, historical buildings, and cultural events.<sup>50</sup> Through cultural tourism, the region has an opportunity to share its stories with visitors and deepen connections between past, present, and future.

#### Market Insights:

1. International travel markets are most interested in the following types of experiences:<sup>51</sup>
  - Enriching, engaged, immersive experiences with culture;
  - Experiences that are related to nature and learning;
  - Authenticity;
  - Seeking benefits of 'discoveries' and 'adventures';
  - Connection to nature and Indigenous way of life in context of spirituality and culture traditions.
2. Cultural experiences are an important driver for people visiting Canada and traveling within Canada. Young Canadians aged 18-34 rate culture in their top three reasons for visiting a destination, even going so far as stating their dream Canadian vacation would include experiencing culture.<sup>52</sup> There is an opportunity for the region to leverage its cultural and artistic experiences to attract this market segment to visit.
3. Participating in cultural experiences ranked in the top five most popular activities for domestic (Canada and Alberta) visitors to Alberta.<sup>53</sup>
4. According to a 2013 study on potential demand for rural vacation experiences in Alberta by residents of Alberta, participants indicated that culture and heritage-

related experiences would be an ideal activity on a same-day trip (67%) or an overnight trip (66%).<sup>54</sup>

5. Improvements in cultural tourism, such as better advertising, higher quality attractions and more unique festivals and events would encourage visitation to Alberta's rural areas.<sup>55</sup>
6. The Indigenous Tourism Association of Canada states that Indigenous tourism opportunities are normally sought out while on trips, as opposed to during the pre-trip destination selection process.<sup>56</sup> This positions Indigenous tourism products well to complement and be packaged with other tourism offerings in the region.
7. Indigenous tourism has potential to become a significant value-added cultural product.<sup>57</sup> With regards to prospective visitors to Canada in 2007, 82% of French travellers, 72% of German travellers, and 46% of British travellers expressed a high level of interest in Indigenous experiences.<sup>58</sup>
8. Travellers from the United States are looking to be actively involved through one-on-one interactions in unique Indigenous experiences.<sup>59</sup>

## 5. Agritourism/Culinary Tourism

### Description:

Agritourism is an emerging sector of Alberta's visitor economy that shows strong potential for further development. Agritourism can be thought of as the crossroads of agriculture and tourism. In other words, agritourism occurs when travel is linked to or motivated by agriculture-related products, services, and experiences. Some examples of agritourism include farm stays, long table dinners, cattle drives, and cowboy storytelling.

There are strong roots to the agricultural industry in the Mountain View region. Agriculture is an important driver of the local economy and is a central theme to the region's culture and heritage. Through agritourism, there is opportunity to develop existing assets into tourism attractions and experiences that could serve to diversify the economy and increase the vibrancy of rural areas.

Closely related to agritourism is culinary tourism. More than simply eating at local restaurants, culinary tourism adds value to the visitor experience by connecting producers and chefs; by featuring local culinary talent; and by creating new and

memorable experiences that enable visitors to see, touch, smell, hear and taste the destination.<sup>60</sup> Good quality food and drink are vital components of excellent visitor experiences.

There are several regularly scheduled, province-wide, culinary tourism events that the Mountain View region could leverage to grow agritourism and culinary tourism offerings. These include Alberta Open Farm Days, which is an annual two day agritourism showcase featuring farm-to-fork culinary events and open houses across the province, and Alberta Beer Week, which is a weeklong event in October celebrating Alberta's craft breweries.

### Market Insights:

1. Agritourism and culinary tourism-related activities are among the top experiences that appeal to Canada's target markets (e.g. farm stays, attending farmers markets, dining at restaurants offering local ingredients).<sup>61</sup>
2. Culinary offerings are a top driver of domestic travel for 18 – 34 year-olds. Eating and drinking local food is among the most popular activities for this travel segment when visiting a destination.<sup>62</sup>
3. Domestic visitors spent approximately \$309 million on food and beverage in the Central Alberta Tourism Region in 2017.<sup>63</sup>
4. A survey of potential agritourism consumers from the Calgary Metropolitan Area found that there is a high level of interest in agritourism. 91% of respondents indicated they would drive up to 45 minutes for an agritourism experience.<sup>64</sup>

## 6. Business Tourism

### Description:

Travel for business purposes is a significant driver of tourism in Alberta. In 2017, business travel accounted for 11% of all domestic overnight visits to the province.<sup>65</sup> It is also known that business travellers are high yielding visitors whose average spending per trip is often much higher than other traveller types.

One important segment within business tourism is the meetings, incentives, conventions, and events (MICE) sector. Although the Mountain View region is not currently set up to host large conferences or conventions, there is opportunity to

attract small scale business-related meetings and events. Some examples of these include corporate retreats, staff appreciation offerings, team building exercises, and training programs.

### Market Insights:

1. Meetings delegates are the highest yield traveller of all tourism channels. Therefore, attracting these types of visitors can have significant economic impacts.<sup>66</sup>
2. Research from Destination Canada indicates that the MICE market represents 15% (2.3 million trips) of all travellers to Canada. MICE travellers spend about 40% more per night than leisure travellers.<sup>67</sup>
3. Travel Alberta has recognized the importance of this market and offers a dedicated digital hub for event planners to source destination content, suppliers, and inspiration.<sup>68</sup>
4. Business Events Canada promotes Canada as a leading country in many sectors, including natural resources (i.e. oil and gas). The region is a world leader in the natural resource sector, making this a natural opportunity to capitalize on to attract industry-specific MICE tourism.<sup>69</sup>

## 7. Visiting Friends and Relatives Tourism

### Description:

Travel for the purposes of visiting friends and relatives (VFR) is a significant driver of tourism in Alberta. On a provincial level, VFR is the primary reason for 44% of total overnight trips and accounts for 29% of all overnight tourism spending in the province. Given that the primary purpose of VFR travel is to visit a friend or relative, every community has the potential to benefit from VFR.

The role of residents as hosts is instrumental to the VFR experience. As the main point of entry into a destination, they are often responsible for introducing their visiting friends and relatives to the region and recommending options for activities and experiences to take part in during the visit. Research indicates that resident hosts are the “gatekeepers of the product” and must be sold on the value of their community’s tourism offering.<sup>70</sup>

### Market Insights:

1. 87% of respondents to the Mountain View Regional Parks, Recreation and Culture Master Plan resident survey indicated that they are Very Likely or Likely to invite their friends and/or family to visit the Mountain View region within the next two years.

2. The top activities respondents to the Mountain View Regional Parks, Recreation and Culture Master Plan resident survey like to do with friends and family when they visit the Mountain View region include spending time with friends/family at their residence (64%), spending time outside/visiting natural attractions (54%), visiting local shops and eateries (49%), attending a festival or community event (36%), and going camping/RVing (30%).\*
3. The visiting friends market tends to be younger (20-40 year olds), travel in small groups or alone, and take shorter trips (1-4 days). Visiting friends primarily travel for fun and prefer experiences that are exciting, intense, and focused on a particular activity.<sup>71</sup>
4. The visiting relatives market tends to be families with a range of ages, travel in large groups, and take longer trips (6+ days). Visiting relatives primarily travel to strengthen family relationships and prefer experiences that are relaxed, accessible, and can be enjoyed by the whole family.<sup>72</sup>

\*Multiple responses were accepted for this question, which is why the totals add up to more than 100%.

5

# Strategic Recommendations



This section puts forward strategic recommendations that, when implemented, will support the growth of Mountain View's visitor economy.

## Strategic Recommendations

### 1. Develop a Tourism Product Development Plan

There appears to be a lack of visitor and market-ready tourism product in the Mountain View region. Developing new tourism products will support increased visitation and visitor spending in the region.

It is recommended that the region develop a Tourism Product Development Plan that will serve to set tourism stakeholders on a path toward developing new, high potential tourism product in the Mountain View region.

### 2. Develop a Regional Tourism Strategy

At the present time the region's tourism activities are "siloed" leading to a fragmented regional tourism sector that has limited engagement and lacks a collective voice. Further, there is no clear lead organization that will grow tourism. For these reasons, the region could significantly benefit from a regional tourism strategy.

### 3. Establish a Regional Tourism Development Task Force

The region lacks a formal mechanism for partner municipalities and tourism stakeholders to organize their tourism development efforts and collaborate on initiatives. Establishing a Regional Tourism Development Task Force would help to fill this gap. The purpose of this group would be to implement the recommendations in this report and lead destination development activities in the region.

Ideally, the task force would have representation from each of the private, public, and not-for-profit sectors. It is envisioned that local tourism working groups would also be established for each partner municipality.

### 4. Explore the Opportunity to Host the Alberta Games and Other Sports Events

It is recommended that the Mountain View region explores the opportunity to bid on the Alberta Games. The next bidding cycle will begin in 2022 with the Games organizers looking for bids to host the 2024 Alberta Games. The Region should also consider bidding on other multi-sport and single sport events.

### 5. Implement the Mountain View Regional Parks, Recreation and Culture Master Plan

The Mountain View Regional Parks, Recreation and Culture Master Plan contains recommendations that have strong linkages to tourism. These include indoor and outdoor facility development to support sport tourism, downtown revitalization, wayfinding and signage enhancements, and community branding suggestions.

### 6. Undertake Regional Collaborative Marketing

There is a strong case to be made for collaborating regionally on tourism marketing. Visitors appreciate comprehensive sources of information when they plan their trips. Having multiple sources of visitor information often leads to fragmentation and information gaps, which ultimately causes barriers to visitation. Additionally, visitor perceptions of destinations often do not consider municipal boundaries. What is more important is the destination's brand and activity offerings. Furthermore, stakeholders can achieve a greater leverage on their marketing resources by collaborating.

### 7. Facilitate Tourism Training

There are many excellent training opportunities offered by Travel Alberta (TA), Alberta Jobs, Economy, and Innovation (AJEI), Indigenous Tourism Alberta (ITA), and other organizations that could be offered in the Mountain View region to build the capacity of tourism businesses and stakeholders. Some examples of training opportunities include:

- Experience Essentials Workshop (TA)
- Partnering and Packaging Workshop (TA)
- SHiFT Program: Transforming Products to Experiences (TA)
- Tourism Entrepreneurship Startup Seminar (AJEI)
- Visitor Information Providers Program (AJEI)
- Spring Training (AJEI)
- Indigenous Tourism Startup Workshop (ITA)
- Cultural Tourism Pathway Program (ITA)
- Cultural Awareness Training (ITA)
- SuperHost Customer Service Training (go2HR)
- Familiarization tours

Funding support for these programs may be available, which means they could be offered at little or even no cost. The Regional Tourism Development Task Force should assess the needs of local tourism operators and tourism-related businesses and seek to provide training opportunities to increase their capacity.

### 8. Identify Tourism as a Priority Sector for Development

Tourism should be formally identified as a priority sector for development within the Mountain View region. Additionally, tourism should be “at the table” and be strongly considered during municipal planning related to economic development, recreation, community development, and infrastructure.

### 9. Fund Tourism Development

Successful tourism development requires time, energy, and resources to achieve. Therefore, resourcing is needed to ensure initiatives move forward and momentum is maintained. Potential grant funding programs to support tourism development are included in Appendix B.



6

# Conclusion



## Conclusion

This document provides a starting point for the region to invigorate its tourism development efforts and the municipal partners are well positioned to do so. Investment in tourism now will set the region on a path towards developing a dynamic and diversified visitor economy that provides a host of sustainable economic, community, and environmental benefits to the region.

7

Appendices



## Appendix A: Overview of the Alberta Games

The Alberta Games provide many benefits to both the host community and to thousands of Albertans who participate at local, zone, and provincial levels. The Alberta Games are an opportunity to celebrate young athletes and provide them with a venue to compete and reach their athletic potential.

### Hosting the Alberta Games

Municipalities are invited to submit a bid to host the Alberta Games approximately three and a half years in advance of the Games. Consultative assistance and guidelines for communities interested in hosting an Alberta Games are available from the Alberta Government’s Sport, Physical Activity & Recreation Branch.

Communities hosting the Alberta Summer or Winter Games must have facilities suitable for staging approximately 20 sport competitions and be capable of feeding and accommodating approximately 2,800 athletes, coaches, and officials over a four-to-six-day period. Municipalities with a population of less than 10,000 are encouraged to partner with neighboring communities to submit a joint bid.<sup>73</sup>

The typical Alberta Summer or Winter Games costs approximately \$1.6 million to host. Host communities receive consultative assistance and base financial support from the Sport, Physical Activity & Recreation Branch. See Figure 8 for a sample games revenue budget.<sup>74</sup>

**Figure 8. Typical Games Revenue Sources (Example for Illustration Purposes Only)**

GOA Operating Grants	\$420,000
Municipal Government	\$380,000
Fundraising, Admissions, Gifts in Kind, Sponsorship, Other Grants	\$800,000
<b>Total</b>	<b>\$1,600,000</b>

A variety of municipalities across the province have hosted the Summer and Winter Games. Some municipalities have come together to form regional bids, such as the Lakeland Region, the Tri-Region, and Okotoks and Black Diamond. For a list of host communities, see Figure 9.

**Figure 9. Alberta Games Host Communities**

Year	Alberta Summer Games	Alberta Winter Games
2010	Peace Region	Lakeland Region (Bonnyville/Cold Lake/M.D. of Bonnyville)
2012	Lethbridge	Tri-Region (Spruce Grove/Stony Plain/Parkland County)
2014	Airdrie	Banff/Canmore
2016	Leduc	Medicine Hat
2018	Grande Prairie	Regional Municipality of Wood Buffalo
2020	Lethbridge (cancelled)	Airdrie
2023	Okotoks, Black Diamond	(unannounced)

## Appendix B: Grant Funding Opportunities

The Government of Alberta and the Government of Canada invest funds in tourism development initiatives through various programs as described in Figure 10.

**Figure 10.** Provincial Funding Programs

Organization	Program	Available Funding
Travel Alberta	Cooperative Investment Program	\$15,000 - \$100,000 (depending upon funding stream)
Travel Alberta	Capital Investment Program	Up to \$500,000 (depending on project type)
Travel Alberta	Tourism Training Programs	100% of approved training costs
Alberta Jobs, Economy, and Innovation	Community and Regional Economic Support (CARES)	\$10,000 minimum
Alberta Jobs, Economy, and Innovation	Major Cultural and Sport Events	\$250,000 maximum
Alberta Jobs, Economy, and Innovation	Community Facility Enhancement Program	\$125,000 (small) \$1,000,000 (large)
Alberta Jobs, Economy, and Innovation	Heritage Awareness Grants	\$15,000
Alberta Jobs, Economy, and Innovation	Historic Resource Conservation Grants	\$25,000 (studies and professional services) \$50,000 - \$100,000 (conservation grants)
Alberta Jobs, Economy, and Innovation	Tourism Entrepreneurship Startup Seminar	Seminars are free to attend
Prairies Economic Development Canada	Tourism Relief Fund	\$100,000 (non-repayable) \$500,000 (fully repayable)

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