

# Investing in Alberta's Tourism Industry

## Canadian Badlands: An Overview

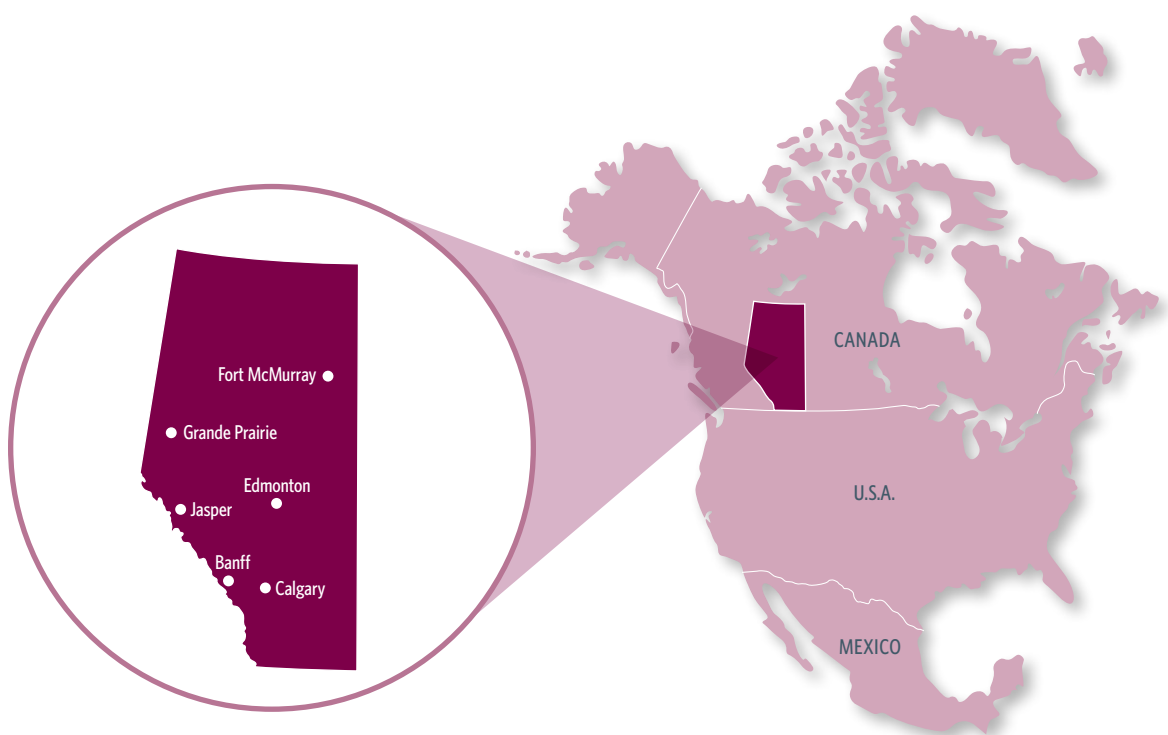




# The Province of Alberta

The province of Alberta is located in Western Canada and has a population of more than 3.5 million people and covers an area of 661,000 square kilometres. Alberta's two major cities, Edmonton and Calgary, each have populations in excess of 1 million people. The Western Canada market has a population of more than 10 million people, and Alberta's proximity to the western United States provides easy access to an overall market of 60.5 million people including 10 states from Colorado west to the Pacific Coast.

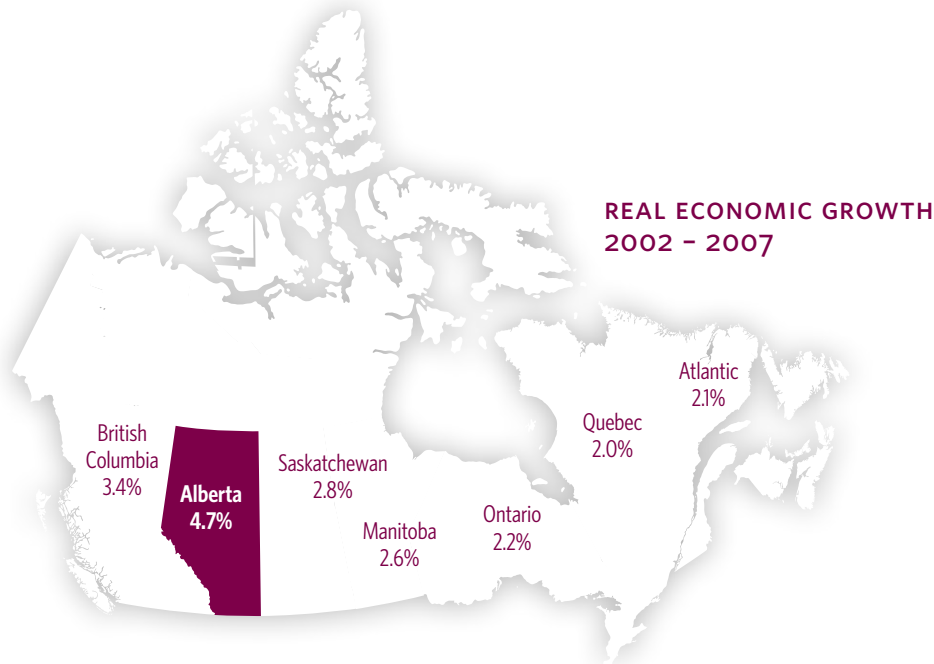
Alberta is served by Canadian and international air carriers through international airports in Edmonton and Calgary. The airports are supported by a well developed and maintained provincial highway system that extends throughout Alberta.





## Alberta Has Led Economic Growth

Over the past five years, Alberta has had the highest rate of economic growth of all of the provinces in Canada at 4.7%. This exceeded the 2.7% annual growth rate for Canada as a whole, according to Statistics Canada.



In 2007, Alberta's population grew at a nation leading rate of 3.1%. This was three times the Canadian growth rate. According to Statistics Canada, this was due to the province's robust economy and record migration from other Canadian provinces.

Alberta's total Gross Domestic Product was \$240 billion in 2006\*. The provincial economy is supported by traditional resource sectors such as oil and gas, agriculture, forestry along with manufacturing, technology and service related sectors such as tourism.

Alberta is blessed with an abundance of natural advantages that form the foundation of its thriving economy. The Alberta government has built on this foundation by fostering a positive business climate based on low taxation that attracts investment, creates diversity, and encourages Alberta businesses to compete successfully around the globe.

This foundation includes:

- a strong and diversified economy;
- a globally competitive business tax environment;
- an efficient and modern infrastructure;
- strategic access to the North American free trade market and to North Asian markets;
- political stability and low taxes;
- a young, skilled and productive workforce;
- the lowest overall personal taxes in Canada;
- a fiscally responsible government with no net debt;
- a government that understands and works closely with business; and
- safe communities with a superior quality of life and diverse cultures.

\* Latest Statistics Canada data.



## Notable Tourism Trends

The baby boomer market in Canada has the time and money available for travel. They are looking for a range of vacation opportunities that may also involve the purchase of recreational property. In fact, Albertans have and continue to purchase recreational real estate in Western Canada at a heightened pace.

- ✦ Alberta's continued economic strength means that Albertans continue to lead the country in terms of disposable income.
- ✦ While Albertans are gainfully employed, with healthy income streams, many are looking for short getaway vacations within a 1.5 to 3 hour radius.
- ✦ Cultural and heritage tourism is growing in popularity as tourists seek experiences that allow them to learn about the places and people where they are visiting.
- ✦ As tourists continue to seek meaningful travel experiences, the outdoor and eco-tourism opportunities available in the Canadian Badlands area will be highly appealing.
- ✦ Recreational Vehicle (RV) ownership in Alberta has remained strong, and some owners may prefer to travel shorter distances and stay longer in particular locations. Demand for RV site ownership and or storage facilities is expected to increase.
- ✦ Throughout Canada there is a trend towards blending residential and resort development, and increasing the length of stay and the volume of repeat visitors. This applies to traditional fixed roof and RV resort type developments.
- ✦ Given the interests of various travel segments, resort-based developments are incorporating a range of outdoor recreation and water-based activities, along with spa and wellness related services.

### **Tourism is one of the pillars of Alberta's economy.**

#### **Based on data from Statistics Canada:**

- The total number of visitors to Alberta in 2006 was 19.6 million.
- Of the 19.6 million visitors to Alberta, residents of Alberta accounted for approximately 79%, residents of other Canadian provinces accounted for 12% and international visitors accounted for 9%.
- Total tourism revenue in 2006 was just over \$5.1 billion CDN.
- Of the \$5.1 billion, Alberta residents accounted for \$2.5 billion or 48%. Residents of other Canadian provinces accounted for \$1.2 billion (24%), while international visitors spent \$1.4 billion (28%) in Alberta.

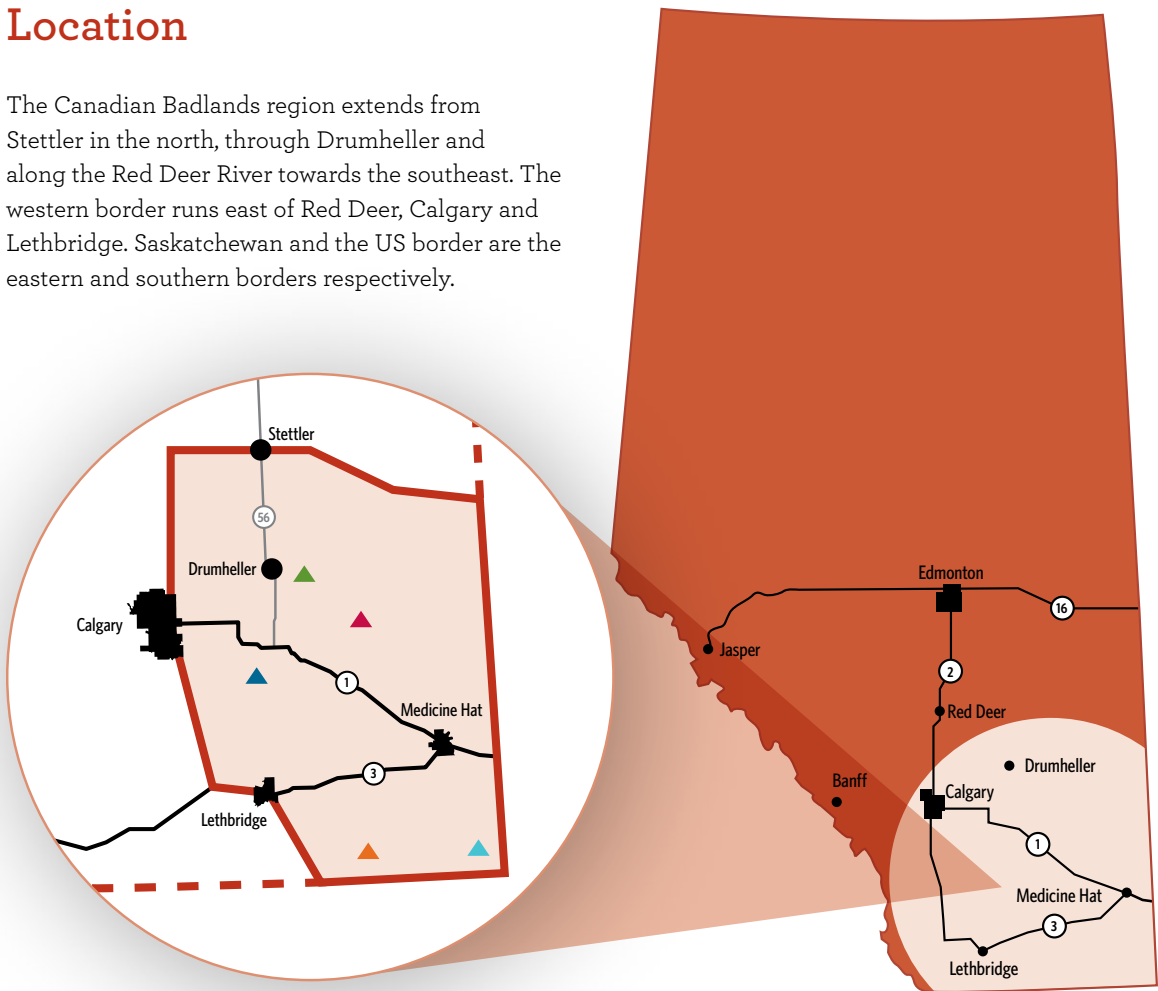








# Canadian Badlands - Overview

The Canadian Badlands is home to the Royal Tyrrell Museum, a world-class dinosaur museum, known by paleontologists and dinosaur enthusiasts as one of the largest deposits of dinosaur fossils in the world. Complementing the Royal Tyrrell are assets throughout the region that include river valley badlands, un-glaciated hills, hoodoos, huge open skies, a UNESCO World Heritage Site, rich Aboriginal history, and a range of man-made attractions, along with culturally rich festivals and events.

## Location

The Canadian Badlands region extends from Stettler in the north, through Drumheller and along the Red Deer River towards the southeast. The western border runs east of Red Deer, Calgary and Lethbridge. Saskatchewan and the US border are the eastern and southern borders respectively.



-  Canadian Badlands Region
-  Dinosaur Provincial Park
-  Writing-on-Stone Provincial Park
-  Royal Tyrrell Museum
-  Blackfoot Crossing Historical Park
-  Cypress Hills Interprovincial Park



## Canadian Badlands: The Case for Tourism Development and Investment

There are a number of natural features, man-made attractions and business advantages that make the Canadian Badlands a very appealing region for tourism development and investment.

- A unique Canadian landscape, with large natural areas protected by provincial parks, ecological reserves and other designations.
- Iconic landscapes – hoodoos, coulees and grasslands that are connected to myth and resonate with a variety of regional, national and international visitors.
- Dinosaurs – unique in Canada, dinosaur bone finds are plentiful and celebrated, especially at the world-class Royal Tyrrell Museum.
- Wildlife is in abundance, and often visible from roadways in the region.
- Various reservoirs, lakes and scenic rivers that are suitable for water activities.
- History – coal, dryland farming, ranching/western heritage, agri-industrial development, irrigation, rail history, manufacturing, and a history of challenge that tells a story of the people who live and prosper in the region today.
- Major Attractors – Dinosaur Provincial Park (UNESCO World Heritage Site), The Royal Tyrrell Museum, Medicine Hat Clay Industries District National Historic Site and Medalta Potteries, Blackfoot Crossing Historical Park and a range of other national historic sites and provincial parks.
- Small, rural community lifestyles and local people are increasingly of interest to urban visitors that want to learn about life in small communities.
- Location – accessible from a major international airport, two regional airports, and bisected by Trans-Canada Highway 1, a major inter-provincial corridor.
- Good infrastructure – an extensive highway network, high quality water and sewer services, and a range of other hard and soft services that make the region suitable for development.
- Organization – over 56 communities working under one banner, Canadian Badlands Ltd., to move tourism development and investment initiatives forward.
- Supportive local, provincial and federal governments.



## Major Tourism Attractors

The unique and diverse landscape of the Canadian Badlands is itself a major reason for people to visit the region, along with the rich deposits of dinosaur bones and history of First Nations peoples in this part of Alberta.

The region's natural attractions are featured through the provincially operated Royal Tyrrell Museum, a world-class dinosaur museum that draws 400,000 visitors annually, nine provincial parks, including a UNESCO World Heritage Site and a wide range of cultural related attractions operated by municipalities and the private sector.

Blackfoot Crossing Historical Park opened in 2007 and is operated by the Siksika First Nation. It showcases the rich culture of the Blackfoot people, and is located on a site that has been recommended for designation as a UNESCO World Heritage Site.

With the region there are seven attractions designated as National Historic Sites.

Opportunity exists for the development of new tourism attractors in the region, including four season resorts featuring fixed-roof accommodation and recreational property development.

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## Complementary Attractions

A range of smaller attractions in the region help support the larger attractors and create an overall critical mass to help draw visitors into different areas of the Canadian Badlands:

- 4 interpretive programs, walks or tours;
- 17 historic parks, sites, or heritage interpretive tours;
- 3 palaeontological/archaeological attractions (digs, interpretive tours);
- 12 annual music festivals;
- 15 annual arts/cultural festivals;
- 18 special events or celebrations;
- 9 craft events;
- 30 museums;
- 5 galleries;
- 10 live theatre operations;
- 2 music/performing arts festivals; and
- 19 sporting rodeos.

## Outdoor Adventure and Activities

Outdoor adventure activities that can be further developed in the Canadian Badlands include:

- River and water based activities (canoeing, rafting);
- Golfing;
- Mountain biking;
- Horseback riding;
- Birding;
- Wildlife viewing;
- Scenic viewing;
- Hunting;
- Boating; and
- Ice fishing, ice boating, para-skating and other winter activities.

The major water based attractions in the area include: Red Deer River, Bow River, South Saskatchewan River, Milk River, Lake Newell, MacGregor Lake, Crawling Valley and Cypress Hills.





## Examples of Major Attractors and Complementary Attractions in the Canadian Badlands

ATTRACTIONS	LOCATION	ANNUAL VISITATION
Dinosaur Provincial Park	Dinosaur Provincial Park	70,000 - 90,000
Field Station of the Royal Tyrrell Museum	Dinosaur Provincial Park	10,000 - 12,000
Helen Schuler Coulee Centre	Lethbridge	23,000 - 25,000
Kinbrook Island Provincial Park	Brooks area	40,000 - 45,000
Royal Tyrrell Museum	Drumheller	400,000
Blackfoot Crossing Heritage Centre	Siksika First Nation	Not Available
Writing-on-Stone Provincial Park/Áísína'pi National Historic Site	Milk River	45,000 - 50,000
Cypress Hills Interprovincial Park	Medicine Hat area	140,000 - 160,000
Dry Island Buffalo Jump Provincial Park	Big Valley area	40,000 - 50,000
Brooks Aqueduct	Brooks area	2,500 - 3,400
Last Chance Saloon in The Rosedeer Hotel, Wayne Ghost Town	Wayne	Approximately 30,000
Medicine Hat Clay Industries National Historic District	Medicine Hat	5,000 - 7,000
Rosebud Theatre	Rosebud	25,000 - 30,000
Taber & District Irrigation Impact Museum	Taber	Approximately 1,000
Atlas Coal Mine	Drumheller area	23,000
Redcliff Museum	Redcliff	Approximately 1,000
Southern Alberta Art Gallery	Lethbridge	20,000 - 25,000
Canadian Badlands Passion Play	Drumheller	7,000 - 10,000

Source: Alberta Tourism, Parks and Recreation (2008)

\* Additional information can be found at [www.canadianbadlands.com](http://www.canadianbadlands.com)





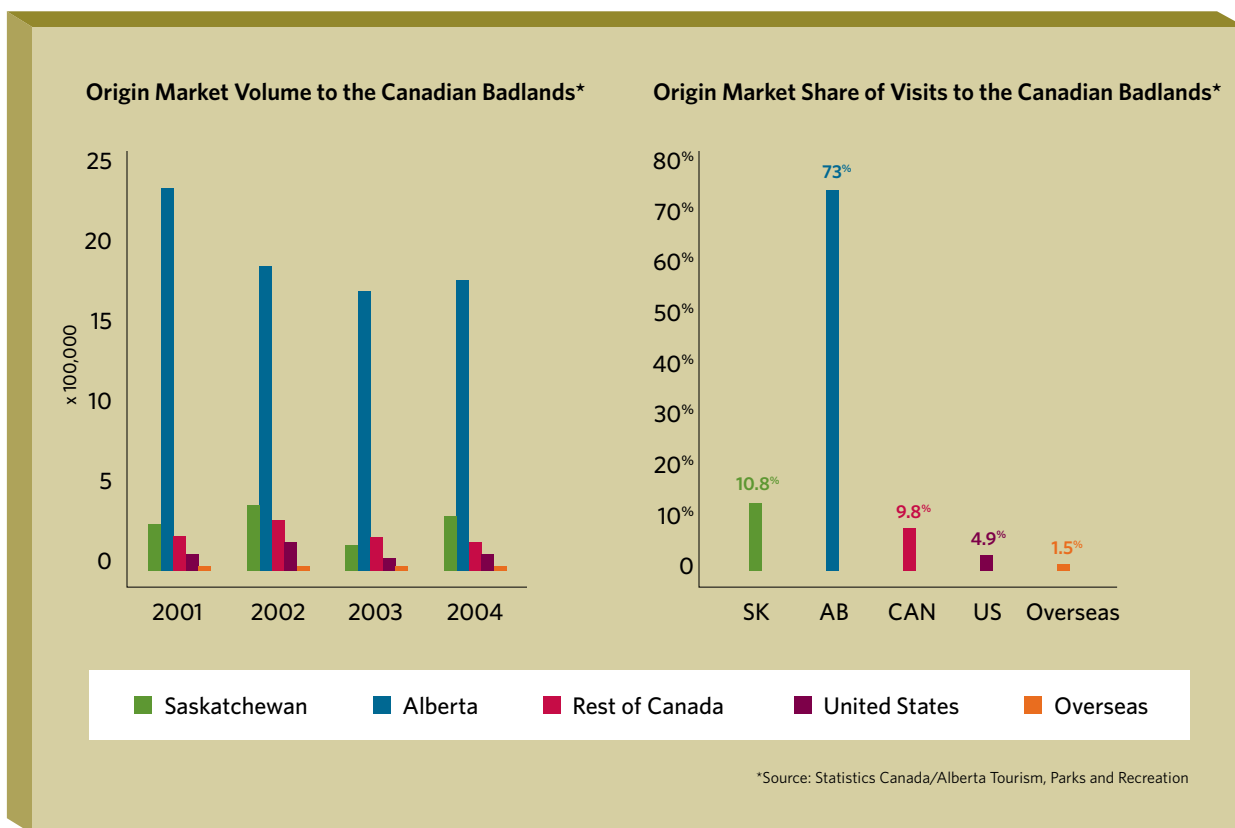
## Provincial Parks in the Canadian Badlands

NAME	PRINCIPAL ASSETS OF INTEREST	COMMENTS
Cypress Hills Interprovincial Park (CHIPP)	Protects a unique natural area which was not glaciated; unique ecosystem, archaeological dig, North West Mounted Police (NWMP) heritage, visitor accommodations and interpretation. CHIPP has a central cottage community, several lakes, a ski area, a NWMP site, trails, camping and a visitor centre.	One of the few interprovincial parks in Canada, which straddles the Alberta/Saskatchewan border.
Dinosaur Provincial Park (DPP)	Protects a Badlands landscape rich in dinosaur fossils. A visitor centre, a viewpoint, guided park interpretation, a small campground, extensive trails and a store/café comprise this site.	A UNESCO World Heritage Site.
ÁÍŚÍNA'PI (Writing-on-Stone Provincial Park) (WOSPP)	One of the largest collections of aboriginal rock art in North America, and a spiritual centre for aboriginal peoples. The Milk River valley, NWMP site add to the natural and man-made heritage values.	On Canada's list for UNESCO World Heritage Site designation.
Dry Island Buffalo Jump Provincial Park (DIBJPP)	Protects the Red Deer River Valley and a spectacular Badlands landscape.	While the park attracts the recreationist, it is not near its potential in servicing the tourist/scenic viewing markets.
Kinbrook Island Provincial Park (KIPP)	Protecting an abundant birding area and a marshland, this park provides excellent boating, along with camping and day use facilities in close proximity to Brooks.	Primarily a local and regional day use park, KIPP offers some of the best water-based recreation opportunities in southeast Alberta.
Tillebrook Provincial Park (TPP)	Located in a prairie grassland region, this park provides camping opportunities in close proximity to the Trans-Canada Highway.	Used mainly by locals, this park is easily accessed from the Trans-Canada Highway.
Wyndam Carsland Provincial Park (WCPP)	This park on the Bow River provides access to recreational fishing and boating, as well as group and individual camping in close proximity to Calgary.	One of the largest campgrounds in the area.
Park Lake Provincial Park (PLPP)	A small park in the grassland region near Lethbridge.	Large day use market from Lethbridge and area.
Little Bow Provincial Park (LBPP)	Provides fishing and boating access to the Travers Reservoir with 189 camping sites.	Large day use market for boating on the reservoir.

## Canadian Badlands: Overview of Tourism Visitation

Alberta Tourism, Parks and Recreation has produced a special travel volume analysis for the Canadian Badlands region based on domestic and international visitor data provided by Statistics Canada. This research shows the volume and share basis for origin markets.

Canadian Badlands markets are dominated by domestic visitors primarily from Alberta and Saskatchewan. More than 93% of all person trips to the Canadian Badlands are made by domestic travellers. Primary markets within Alberta include Calgary and Edmonton, and are followed by markets within the region including Red Deer, Lethbridge and Medicine Hat.





# The Foundation for Tourism Development and Investment in the Canadian Badlands

## Infrastructure

The vast region of the Canadian Badlands is transected by a number of primary and secondary provincial highways, which are largely paved and with shoulders, and are typical of Alberta's high quality construction standards.

Other hard infrastructure in the region includes power, potable water, piped sewer, waste disposal and other basic services. All these services are provided to the high standards typical throughout Alberta.

International gateway air services are provided by the Calgary International Airport, located on the east-central edge of the region. With over nine million passengers, this airport is the largest in Alberta. The Edmonton International Airport, handles over six million passengers each year.

Scheduled air services are also provided to Medicine Hat and Lethbridge, while Red Deer has a quality airport that can handle private and scheduled services. Many communities in the Badlands and a number of private landowners have airstrips that service private, commercial and unscheduled air traffic.

## Communities

The community base in the region consists of a number of modern, vibrant cities functioning as economic generators with a surrounding service area, and smaller communities supporting the agricultural and energy sectors and their own respective trading areas.

Canadian Badlands Ltd. is comprised of over 56 municipal shareholders, representing the majority of the municipalities in the region.

## Tourism Services

While a service base does exist in the region, including accommodation, food and beverage, traveller services, retail, entertainment and other related services, opportunities exist for new development that are focused on accommodation and related amenities to meet the needs of leisure-based tourism markets.

## Tourism Marketing

The Canadian Badlands Ltd. and the Government of Alberta's tourism marketing arm, Travel Alberta, have and continue to work closely together to develop a range of marketing programs to attract visitors to the region, with additional and supporting efforts undertaken by a variety of destination marketing organizations in the larger region.

A provincial tourism highway signage program exists, and helps identify and provide directional information to support tourism attractions and service operators within the region.

## Tourism Development Strategy

The Canadian Badlands Tourism Development Strategy was unveiled in November 2008. This strategy provides a blueprint for the long term development of tourism in the region.



# Alberta Government Support

Alberta Tourism, Parks and Recreation's Tourism Business Development, Research and Investment Branch offers a variety of services for investors seeking to invest in and develop tourism projects, businesses and land in Alberta.

Our interest is in helping investors and developers identify viable tourism development opportunities in the province. With our knowledge of the resources, land base and characteristics of tourist visitation across Alberta, we can tailor our assistance to your needs.

Once you decide on a particular location in the province, we will direct you to key community business contacts. Our services are free of charge to qualified business investors.

## Tourism Related Investment Services

- Assessing and matching your investment interests and financial resources with appropriate tourism business investment opportunities.
- Organizing site visits to review investment opportunities.
- Introducing you to relevant business contacts and facilitating meetings to assist with your investment interests.
- Providing tourism research and development information to substantiate your business case or feasibility study.
- Providing detailed information on tourism sectors of interest.
- Assistance with regard to Crown land leasing opportunities through the Alberta Tourism Recreation Leasing process.
- Links to the Federal Government's Business Immigration Program.
- Access to tourism related investment services through the Alberta government's international office network (Beijing, Tokyo, Hong Kong, Taipei, Seoul, Mexico City, London and Munich).

You can access our services through these international offices or by visiting us online at: [www.tourism.alberta.ca](http://www.tourism.alberta.ca)



## Background Material

The Alberta government, through Alberta Tourism, Parks and Recreation, has sponsored a great deal of research on the tourism development opportunities in the Canadian Badlands. In the past 6 years, the Alberta government has supported the following initiatives:

- |               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |      |                                                                                                                                                                                                                                             |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2002          | The Canadian Badlands Forum: Evolving a Vision and Strategy for Tourism Development of the Canadian Badlands, 2001 - 2010                                                                                                                                                                                                                                                                                                                                                      | 2006 | Canadian Badlands Fixed Roof Accommodation Study                                                                                                                                                                                            |
| 2003          | Market Assessment and Visitor Projections: Cypress Hills Interprovincial Park, Dinosaur Provincial Park, Writing-on-Stone Provincial Park                                                                                                                                                                                                                                                                                                                                      | 2007 | Summer Leisure Visitation to Alberta: A Study of the Market Potential of Ontario and Québec                                                                                                                                                 |
| 2004          | Canadian Badlands Eco-Tourism Destination Assessment<br>Canadian Badlands Travel Alberta Perceptions                                                                                                                                                                                                                                                                                                                                                                           | 2008 | Canadian Badlands Tourism Development Investment Opportunities Assessment<br>Western Canadian Market Potential to Visit The Canadian Badlands<br>Canadian Badlands Marketing Plan 2007-08<br>Canadian Badlands Tourism Development Strategy |
| 2005/<br>2006 | Community Tourism Strategic Plans for the following areas: <ul style="list-style-type: none"><li>· Town of Brooks and County of Newell</li><li>· Town of Hanna and Area</li><li>· County of Warner and Area</li><li>· South East Region (Medicine Hat, Cypress County and County of Forty Mile)</li><li>· Special Areas Municipal District of Acadia</li><li>· Community Tourism Strategic Plan Appendices - Canadian Badlands Visitor Information &amp; Statistics.</li></ul> |      |                                                                                                                                                                                                                                             |



For additional information on tourism investment opportunities in the Canadian Badlands, contact:

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