

REDI TOURISM S.W.O.T. WORKSHOP REPORT



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REDI Board & Tourism Committee, High Level

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TABLE OF CONTENTS

	Page
I. BACKGROUND	1
I.1. Purpose of Tourism SWOT Workshop.....	1
II. TOURISM MARKET INFORMATION	2
II.1. Tourism Statistics Sources.....	2
II.2. Tourism Statistics Highlights	3
Tourism Statistics.....	3
Market Segments.....	5
Northwest Territories 2006 Visitor Exit Survey – VFR	5
II.3. Tourism Trends.....	6
III. COMMUNITY TOURISM ACTION PLAN (CTAP) SUMMARIES	7
IV. TOURISM SWOT ANALYSIS.....	7
IV.1. Tourism Assets / Strengths	8
IV.2. Tourism SWOT Analysis	11
V. NEXT STEPS	14
VI. PARTICIPANTS IN TOURISM WORKSHOP, MARCH 18, 2008	16

APPENDICES

	Page
I. Total Visitors to Alberta by Albertan and Out of Province Visitors	18
I.1. Person Trips to Alberta by Visitor Origin	18
II. Total Tourism Receipts in Alberta by Albertans and Out of Province Visitors.....	19
II.1. Estimated Tourism Receipts (\$ millions) by Visitor Origin	19
II.2. Spending by Market (Average Spending Per Person in Alberta on Overnight Visits – 2005).....	19
III. Visitor Statistics to Alberta and Alberta North Tourism Destination Region	20
III.1. International Visitors to Alberta (2004 - 2006)	20
III.2. Canadian Visitors to Alberta (2002 – 2004).....	22
III.3. International Visits to Alberta’s Tourism Destination Regions.....	24
III.4. Albertan’s Visiting Alberta’s Tourism Destination Regions (2004)	25
IV. Hotel Occupancy Statistics	27
IV.1. Accommodation and Average Annual Hotel/Motel Occupancy by Region....	27
IV.2. Source of Room Demand by Region (2003, 2004, 2005).....	27
V. Market Segments – Alberta, BC, Saskatchewan.....	28
V.1. Characteristics of Alberta Market Segments	28
V.2: Activities of Interest to Market Segments	29
V.3. Holiday Interest and Motivation - BC Study	30
V.4. Holiday Interest and Motivation - Saskatchewan Study	32
V.5. Holiday Interest and Motivation: Comparison of AB, BC, SK.....	35
V1. Alberta Resident Market: In-Province Travel Behaviour Study.....	38
VII. Northwest Territories 2006 Visitor Exit Survey Visiting Friends & Relatives	39
VIII. Trends and Potential Product/Market Match Assessment.....	43
IX. REDI Community Tourism Action Plan (CTAP) Summaries.....	46

TOURISM SWOT WORKSHOP REPORT REGIONAL ECONOMIC DEVELOPMENT INITIATIVE FOR NORTHWEST ALBERTA (REDI)

I. BACKGROUND AND PURPOSE

The Regional Economic Development Initiative for Northwest Alberta (REDI) is a partnership of Mackenzie County, the Towns of High Level and Rainbow Lake, Paddle Prairie Métis Settlement, the Chambers of Commerce of High Level and District, Rainbow Lake and La Crete and Area, the Fort Vermilion and Area Board of Trade, the Northern Alberta Institute of Technology (NAIT) and Community Futures Northwest Alberta (CFNWA).

REDI is located in the extreme Northwest area of Alberta, in the Alberta North Tourism Destination Region. It covers a large geographical region of 80,527 sq km, extending from Paddle Prairie in the south to the Northwest Territories border in the north, and from the British Columbia border on the west to Wood Buffalo National Park in the east.

Primary highway access to REDI is via Highway 35 running north-south from the Northwest Territories to Peace River, and by Highway 58 running east-west from Garden Creek to Rainbow Lake. Highway 88 provides alternate north-south access between Fort Vermilion in the north and Slave Lake and Highway 2 to the south. Highway 697 connects Fort Vermilion and La Crete to Paddle Prairie via the seasonal Tompkins Ferry and ice bridge that crosses the Peace River south of La Crete and east of Paddle Prairie.

I.1. Purpose of Tourism SWOT Workshop

In the REDI Business Plan 2005 – 2008, the REDI Board identified an action item to “Work with local tourism agencies to facilitate a tourism and travel seminar in the region”.

In the winter of 2007/08, a Tourism Committee was formed that included representatives from: the municipalities of Mackenzie County, the Towns of High Level and Rainbow Lake, and Paddle Prairie Métis Settlement; the Chambers of Commerce/Boards of Trade in the REDI region; and representatives from the Mighty Peace Tourism Association (MPTA), Northern Alberta Development Council (NADC), and Community Futures Northwest Alberta (CFNWA).

As needs were further defined, *Strategy Plus* was contracted to assist REDI in the following twofold purpose:

1. To compile information from published sources about tourism assets in the REDI region, as well as tourism statistics and trends applicable to Northwest Alberta (e.g., from Travel Alberta, Statistics Canada, and Community Tourism Action Plans, etc.).
2. To facilitate a workshop session with the REDI Tourism Planning Committee made up of tourism and community representatives to share this information and to assist the committee in completing a SWOT Analysis and determining a process to move forward.

Map: Northwest Alberta Economic Development Region (REDI)



II. TOURISM MARKET INFORMATION

II.1. Tourism Statistics Sources

Prior to the Workshop held on March 18, 2008 in High Level, various documents and sources of tourism statistics were reviewed. Statistics were compiled and provided to workshop participants and Tourism Committee members for their review and use.

The resulting tables are included in the Appendices of this report.

For future reference, the sources of statistics that were reviewed include:

- International Travel Survey (ITS) from Statistics Canada for 2000 to 2006. Data for 2007 are not yet available. (Contact Tourism Research, AB Tourism, Parks and Recreation).

REDI Tourism SWOT Workshop Report

- Canadian Travel Survey (CTS) from Statistics Canada for 2000 to 2004, with estimates provided for 2005. Actual data for 2005 to 2007 are not yet available.
- Travel Activities and Motivations (TAMS) reports for Canadian and U.S. Residents, based on a survey of Canadian and American travelers conducted between January and June, 2006. Available on Alberta Tourism, Parks and Recreation website at: http://www.alberta-canada.com/statpub/tourismResearch/tams_national.cfm
- Hotel Occupancy Statistics for Alberta for 2003 to 2005, compiled by Alberta Economic Development and available at: <http://www.alberta-canada.com/statpub/tourismStatistics/accommodation.cfm>
- Holiday Interest and Motivation Studies for Alberta, British Columbia, and Saskatchewan, completed for Travel Alberta & AB Economic Development, in 2004/05.
- Alberta Resident Market: In-Province Travel Behaviour Study 2002, completed for AB Economic Development.
- Northwest Territories 2006 Visitor Exit Survey: Visiting Friends and Relatives, completed for Northwest Territories Tourism and Investment. Available at: <http://www.itl.gov.nt.ca/parks/tourism/pdf/2006%20Exit%20Survey%20-%20Visiting%20Friends%20&%20Relatives.pdf>

II.2. Tourism Statistics Highlights

Alberta is divided into six Tourism Destination Regions (TDRs). The REDI region is located within, and makes up only a portion of, the Alberta North TDR.

Tourism statistics are generally collected and compiled on a provincial or TDR basis which means it is difficult to provide a statistical profile specific to REDI. The following are some tourism highlights relevant to REDI that have been extrapolated from the various studies and surveys noted above. See the tables in the Appendices for more detail.

Tourism Statistics

- Tourism visitation to Alberta peaked in 2001, with a total of 23.7 million person trips from all markets. Following 9/11 and other incidents (SARS, Iraq War, etc), tourism visitation dropped annually until 2004, when it began to recover (to a total of 18.3 million person trips in 2004 and 18.8 million person trips in 2005). See Appendix I.
- Tourism revenues were also impacted, reduced by 20.3% from a high in 2002 of \$5.4 billion to a low of \$4.3 billion in 2003. Tourism receipts then recovered by 14.4% in 2004 to \$5.0 billion and continued to rise by 3.4% to \$5.1 billion in 2005. See Appendix II. Note: Statistics from the 2007 International Travel Survey (ITS) and the 2005 to 2007 Canadian Travel Survey (CTS) are not yet available.
- Albertans are the biggest market for Alberta, accounting for almost $\frac{3}{4}$ of all person trips in Alberta (13.7 million in 2005), and about $\frac{1}{2}$ of all tourism receipts (\$2.5 billion).

REDI Tourism SWOT Workshop Report

- Alberta's other primary markets include: Other Canada (about 18%), United States (about 5%), and Other International (United Kingdom, Germany, Japan) at about 4%.
- While Albertans are the largest market for Alberta, they are the lowest spenders (average of \$202 per person on overnight visits in 2005). In comparison, the average per person spending in Alberta by visitors on overnight trips from the United Kingdom was \$1,270, from Germany (\$957), from Japan (\$683), from the United States (\$652), from Ontario (\$618), from British Columbia (\$313) and from Saskatchewan (\$284).
- The Canadian Rockies TDR, the Calgary and Area TDR, and the Edmonton and Area TDR receive the most visitors from all international markets, while Alberta North TDR receives the fewest. In 2006, just over 4% of visitors to Alberta from the United States visited Alberta North, down from about 5% in 2004 and 2005. There were approximately 3% of visitors to Alberta from Germany and Japan who visited Alberta North TDR in 2006, but less than 1% of visitors from the United Kingdom. See Appendix III.
- Top ranked activities participated in by visitors to Alberta of relevance in REDI include:
 - Visiting Friends and Relatives (VFR).
 - Shopping.
 - Sightseeing.
 - Visiting National or Provincial Parks.
 - Visiting Historic Sites.
 - Walking and hiking.
 - Other sport or outdoor activities.
 - Wildlife and Bird Watching.
 - Golfing.
 - Fishing.
 - Skiing.
 - Cycling.
 - Snowmobiling.

Note: the order of importance of these activities varies by market.
- The high population growth rate in Alberta, resulting in part from in-migration, suggests that visiting friends and relatives will continue to be a key driver for visiting the province.
- Hotel occupancy rates across Alberta averaged 70.3% in 2005, with Alberta North TDR having the highest rate at 77.5%. Alberta Central TDR was slightly above average at 73.5% and Alberta South TDR was lowest with a rate of 60.4%. See Appendix IV.
- The main source of hotel room demand for Alberta North TDR in 2005 was industrial crews (56.6%), significantly higher than the provincial average of 37.3%, but second behind Alberta Central TDR (59.0%).
- The second largest source of room demand in Alberta North TDR was Business Travelers at 29.9%, above the provincial average of 27.1%, but lower than Calgary and Area TDR (42.4%) and Edmonton and Area TDR (41.3%).
- Tourist travelers accounted for an average of only 7.6% of hotel room demand in Alberta North TDR in 2005, lowest of all TDRs and well below the provincial average of 23.5%.

Market Segments

- In 2004/05, Alberta Economic Development and Travel Alberta identified 4 market segments in Alberta, Saskatchewan and British Columbia, each representing approximately one quarter of the population. Three segments, all of which are interested in rural environments, are potential markets of interest to the REDI region. (Appendix V).
- The three segments of potential interest to REDI include:
 - Accomplishers (interested in seeing new places and doing new things).
 - Comfort Seekers (interested in getting away from daily routine, having fun with family and friends, and participating in outdoor recreation activities).
 - Real Relaxers (interested in relaxing, peace and quiet; getting away from daily routine).
- In 2002, the *Alberta Resident Market: In-Province Travel Behaviour Study* identified 5 market segments or clusters with specific characteristics and interests (Appendix VI). The segments include:
 - Free to Go – Cost-Conscious, Empty Nester (19% of Alberta travel market, oldest cluster, predominately male, average age 45 years).
 - Affluent / Career-minded – Mobile Family (21% of Alberta travel market, youngest cluster, primarily female, average age 39 years).
 - Affluent Kids and Cul-de-Sacs (16% of Alberta travel market, highest income and most active cluster, primarily male, average age 42 years, married with children).
 - Metro Single Adventurers (16% of Alberta travel market, retirees and younger trades and professionals, primarily female, average age 44 years, fewer children).
 - Metro, Kid-Centric Mommies (27% of Alberta travel market, middle income, married, larger number of children in household, primarily female, average age 42 years).

Northwest Territories 2006 Visitor Exit Survey – Visiting Friends and Relatives (VFR)

- This survey of 6,217 travelers to visit friends and relatives (VFR) in NWT, representing about 17% of all travelers to the NWT, was completed between May 15 and September 15, 2006. The results are relevant to REDI because of the need for many visitors to NWT to travel on the Mackenzie Highway 35 through the region. (Appendix VII)
- Highlights of the survey include:
 - 95% were from Canada: Alberta (40%); BC (18%); Ontario (15%); 48% were visiting NWT for the first time.
 - 2.3% were from USA. Washington accounted for the most (30.8%), followed by New York (22%) This is a very small sample, so results should be used with caution.

REDI Tourism SWOT Workshop Report

- Almost half of all VFR visitors arrived by road. This included about half of Canadian VFR travelers (2,988) and about three quarters of American VFR visitors (110).
- Nearly 70% of VFR travelers to NWT also visited Alberta during their trip.
- Slightly more than half (53%) of respondents were female, with an average age of 45.5 years (majority either 51 to 60 or 21 to 30 years old).
- VFR travelers are fairly well educated (59% have at least a college diploma); they tend to be retired, professionals or have occupations in the education industry; and have annual household incomes between \$30,000 and \$70,000.
- Average party size was 2 (46.2%); average length of stay in the NWT was 10 nights.
- Activities participated in by VFR travelers to NWT are comparable to those that are, or could be, provided in REDI. These are listed in Appendix VII.

II.3. Tourism Trends

The following are some trends that have been identified from various sources that may impact on tourism in the REDI region.

- More frequent get away trips of shorter duration (2 days) with opportunities for themed programs, small luxury accommodation, spas, experiential activities, etc.
- Interest in spa vacations, with the highest increase by males, with opportunities for small luxury accommodation, fitness activities, pampering, unique dining experiences, and outdoor recreational activities such as golf, skiing, biking.
- Increasing use and ownership of RVs (the impact of higher fuel prices is yet to be determined), with opportunities for serviced campgrounds in scenic locations, experiential activities, circle tour routes.
- Interest in reconnecting with family and roots (heritage, culture, genealogy) and in getting back to nature, with opportunities for agricultural based experiences, country vacations, B and B accommodation, family reunions, guided and self-guided historic and cultural activities, museum and historic site development.
- Interest in Agricultural tourism of all kinds, with related opportunities for farm vacations, trail rides, behind the scenes activities, participating in harvest or other farm activities, fairs, farmers markets, culinary tourism.
- From escapism to enrichment, with an interest in having meaningful experiences, learning about cultures (e.g., Mennonites, First Nations, Métis) or new skills, participating in hands on experiences, customized experiences, outdoor activities, bird and wildlife viewing, ethnic food and beverage.
- Interest in authentic Aboriginal cultural experiences (e.g., First Nations, Métis), including meeting and interacting, hands on participation, arts and crafts, food, guided activities.

REDI Tourism SWOT Workshop Report

- Interest in participating in fishing remains strong, with opportunities for guiding and rental services, access points, lodges and camping, fly-in fishing.
- Support for eco or responsible tourism is growing, including interest in the environment, sustainability, conservation, giving back to the community, green buildings, etc.
- Interest in golf vacations continues, with opportunities for small luxury accommodation, spas, dining experiences, shopping and other outdoor activities.
- Interest remains strong for motorized recreation in all seasons (snowmobile, ATV), with opportunities for groomed and maintained / marked trails, maps, camping and staging areas, back country fixed roof accommodation, guiding, equipment rentals and repairs.
- Interest continues for non-motorized recreation in all seasons (hiking, walking, cycling, trail riding, equestrian, cross-country skiing, snowshoeing), with opportunities for trails, staging areas, signs, maps, rentals and guided experiences, shuttle services to trail heads and for bags between accommodation, equestrian facilities.
- Interest in adventure travel and extreme sports, with related opportunities for a range of support services, accommodation, equipment rentals/sales, lessons and guides.
- Interest in youth sport travel for organized sports events and competitions, with opportunities for arenas, ball diamonds, soccer pitches, low cost accommodation, other supporting activities.

A *Trends and Potential Tourism Product / Market Assessment* table summarizing trends, facilities and activities associated with the trends, potential markets and potential tourism opportunities is presented in Appendix VIII.

III. COMMUNITY TOURISM ACTION PLAN (CTAP) SUMMARIES

Community Tourism Action Plans (CTAPs) were completed during the period 1989 – 1993 for: Improvement District 23 (now Mackenzie County, and including Fort Vermilion, La Crete and Zama), Town of High Level, Town of Rainbow Lake, Paddle Prairie Métis Settlement, Tallcree Band, Beaver First Nation, and Little Red River Cree Band.

These CTAPs were reviewed in relation to assets and constraints to tourism, tourism markets, and priority goals and objectives that had been identified at that time. Summary tables of their contents are included in Appendix IX.

IV. TOURISM SWOT ANALYSIS

A SWOT (Strengths, Weaknesses/Challenges, Opportunities, Threats) Analysis relative to tourism in the REDI region was completed with the participants at the Tourism Workshop on March 18, 2008. Assets and constraints identified in the CTAPs were provided as a starting point for the discussion.

IV.1. Tourism Assets / Strengths

The following list of assets and strengths of the REDI region was identified from CTAPs and during the Tourism Workshop.

Natural Attractions

- Wilderness (big game, variety of wild berries, forests, rivers, lakes, natural beauty)
- Big game (moose, caribou, deer, buffalo), plentiful, large variety, consumptive/non-consumptive uses, hunting
- Major Landscape Features
 - Peace River (size, boating, fishing, water-based activities)
 - Boreal Forest, Jack Pines protected area near Paddle Prairie
 - Prairie farmland (northern most agricultural land)
 - Buffalo Head Hills (lakes, viewpoints, Kimberlite rock formations)
 - Caribou Mountain Wildland Park (lakes, different ecology)
 - La Crete Sand Hills
 - Watt Mountain (tower, viewpoints, lake, dam)
 - Hay-Zama Lakes Wildland Park (lowland/wetland complex, Woodland Caribou, Wood Bison, ducks, geese, migrating waterfowl)
 - Proximity to Wood Buffalo National Park
- Bird Sanctuaries / Bird life (variety, guiding)
- 24 Hour Daylight in summer
- Northern Lights
- Resource industries (oil and gas, forestry)
- Fishing / boating / boat launches (lakes and rivers, lodges)
 - Bistcho Lake (Tapawingo Lodge, fly-in by float or airstrip, fishing, ice fishing, nature lovers, snowmobile access in winter)
 - Caribou Lake (fishing, fly-in by float only)
 - Hutch Lake (campground, beach, fishing, ice fishing, boat launch)
 - Machesis Lake (fishing, boating, boat launch, camping, wildlife viewing)
 - Margaret Lake (fly-in from High Level, private owned lodge, fishing, ice fishing)
 - Rainbow Lake (fishing, ice fishing, water skiing, boating, boat launch)
 - Thurston Lake (fishing, ice fishing)
 - Wadlin Lake (Pelican Island, clean, quiet, fishing, ice fishing, boat launch)
 - Wentzel Lake (fishing, fly-in by float only)
 - Zama Fish Pond (stocked Rainbow trout; RV park, full services, RV Dump Station, fire pits, campground)
 - Chinchaga River (wildlife preserve, boat launch, fishing)
 - Hay River (rafting, fishing)
 - Meander River (fishing, boat launch)
 - Peace River (boating, fishing)
 - Ponton River (rafting, kayaking)
 - Steen River (rafting, fishing, boat launch access at Meander River settlement)
 - Wentzel River (fishing)
 - Heritage Bi-Centennial Park, Fort Vermilion (day use, fishing, boat launch)
- Trails for summer and winter activities throughout region
- Extensive outdoor recreation opportunities (e.g., snowmobiling, off road vehicles/quads, cross-country skiing, hiking, trail riding/equestrian, fishing, hunting, boating, kayaking, wildlife viewing, photography)

Campgrounds

- Rainbow Lake Campground (16 overnight stalls, day use)
- Fox Haven Golf Course Campground, High Level
- Aspen Ridge RV Campground, High Level
- Hutch Lake Campground
- Fantasy North Golf Course & RV Campground, Fort Vermilion
- Fort Vermilion Provincial Recreation Area Campground (10 sites)
- Bridge Campground & Boat Launch, Fort Vermilion
- La Crete Mennonite Heritage Village and Campground
- Woodland RV Park, La Crete (50 sites)
- Tompkins Landing campsite and boat launch
- Machesis Lake Provincial Recreation Area Campground (20 sites)
- Wadlin Lake Provincial Park Campground (55 sites)
- Zama Community Park and Campground
- Informal camping (primitive/unserviced camping throughout area)

Historic / Cultural Attractions

- Historical significance of area (fur trading, early settlement, Aboriginal & Métis history)
- Mackenzie Crossroads Heritage Museum, Trading Post & Visitor Centre, High Level
- La Crete Mennonite Heritage Village
- Lean-To Museum and Archives & Visitor Log House (Fort Vermilion)
- La Crete Ferry (Tompkins Landing Ferry) on Peace River
- La Crete Landing (site on Peace River Landing for Mennonite communities)
- Fort Vermilion (25+ historical sites and buildings, cemetery, Old Bay House, fur trade, settlement of Alberta, oldest settlement, archaeological digs)
- North Vermilion Settlement (historic sites, dove tail joint log buildings, Butter Town)
- Eleske Shrine (site of Annual Pilgrimage)
- Aboriginal Culture / history
- Keg River (Dr Mary Jackson; Old Hudson Bay House; log cabin school)
- Historic grave yard, Paddle Prairie
- Alexander Mackenzie
- Indian Cabins (baby burial tree)
- Wagon Trek (N and S Tallcree to Fort Vermilion, High Level, Paddle Prairie to Manning)
- Multi-cultural population, mosaic / ethnically diverse
- Ethnic Communities (food, traditions, events)
 - Mennonites (German, Bolivian), La Crete
 - First Nations (Tallcree, Little Red River Band, Beaver First Nation, Dene Tha')
 - Métis Settlement, Paddle Prairie
 - Filipino Immigrant Society, High Level
 - Eastern Canadian

Golf Courses

- Fox Haven Golf Course, High Level (18 hole, club house, pro shop)
- Rainbow Lake Golf Course (9 hole, clubhouse)
- Fantasy North Golf Course, Fort Vermilion (9 hole)
- La Crete Golf & Country Club (9 hole, clubhouse)
- Zama Golf Course (on hold)
- Firesky, High Level (planning for 18 hole)

REDI Tourism SWOT Workshop Report

Recreation Facilities and Activities

- R. E. Walter Memorial Aquatic Centre, High Level
- High Level Sports Complex
- Northern Lights Recreation Centre, La Crete (arena, events, bowling)
- Fort Vermilion Community Complex (hockey rink, dance hall, curling rink)
- Skate board parks, BMX track (La Crete, High Level, Paddle Prairie)
- Ball diamonds, playgrounds, parks (all communities)
- Rainbow Lake Multi-Use Facility (dance hall, library, health & fitness club, concession stand, meeting rooms, 3 curling sheets & lounge, ice arena)
- Communaplex, Paddle Prairie
- Outdoor rinks (throughout area)
- Rocky Lane Indoor Riding Arena
- Footner Lake Forest Provincial Recreation Area (picnic area only)
- Quads / ATV (rentals available, Machesis Lake to Peace River, horses & ATV)
- Walking / nature trails (Rocky Lane, La Crete, Fort Vermilion)
- Cross-country ski trails (Rocky Lane, Rainbow Lake)
- La Crete Polar Cats Snowmobile Club (180 mi groomed trail system around La Crete, 30 mi groomed trails in Sandhills area, 10 mi connecting La Crete & High Level)
- Watt Mountain Wanderers Snowmobile Club of High Level maintains 350 km of groomed & signed snowmobile trails; emergency warm up huts, rib pits (BBQ), GPS, heli landing for fire department)
- Snowmobile trails (Rainbow Lake, Zama area)

Transportation / Linkages

- Mackenzie Highway main route linking NWT to south (Gateway to NWT)
- Airports (High Level, Rainbow Lake, La Crete, Fort Vermilion, Zama)
- Regularly scheduled air service out of High Level, Rainbow Lake
- Several helicopter and fixed wing aircraft operators in area (Fort Vermilion)
- Circle Route possibility: Hwy 35 / 697 / 58 / 88
- Deh Cho Travel Connection (Mackenzie/Liard/Alaska Highway route)
- Northern Alberta Heritage Trail (Reach 5: northern link from Peace River to High Level / Fort Vermilion / La Crete)
- La Crete / Tompkins Landing Ferry
- Northern Express bus service from High Level to Edmonton and Grande Prairie
- Greyhound Bus Lines service 6 days a week
- Fort Nelson circle route in winter on ice road
- Adjacent to Northwest Territories

Services / Education / Community

- Native Friendship Centre
- Hospital (High Level, Fort Vermilion)
- Medical Clinic (Rainbow Lake, La Crete) / Health Unit (Zama)
- Visitor / hospitality services in main communities (accommodation, food, beverage)
- Northern Alberta Institute of Technology (High Level, La Crete, Rainbow Lake)
- Northern Lakes College (Fort Vermilion, Paddle Prairie)
- Fort Vermilion Research Site (agriculture research)
- Safe and friendly communities / High employment
- Young population, high birth rate

Events

- Winterfest, High Level (Feb)
- Annual Women's Wellness Conference, La Crete (March)
- Family Fest, High Level (March)
- Annual Zama Snowmobile Poker Rally (March)
- Easter Egg-Stravaganza (Rainbow Lake, High Level)
- Volunteer Appreciation Night, Rainbow Lake (April)
- La Crete Trade Show (April)
- Spring Fling Community Dance and Auction (May)
- Seniors Week BBQ, High Level (June)
- La Crete Mud Bog (June)
- Zama Quad Rally (June)
- Childrens Festival (June)
- Midnight Golf Tournament (June)
- Canada Day Celebrations, High Level, Rainbow Lake (July)
- La Crete Gospel Festival (July)
- High Level Rodeo (July)
- Fort Vermilion Rodeo (July)
- La Crete Annual Pro Rodeo (August)
- La Crete Mud Bog (August)
- Town 'n' Country Fair, Fort Vermilion (August)
- Farmers Market (Fridays, La Crete)
- Annual Senor's Life and Wellness Conference, La Crete (Oct)
- Annual Caregivers Conference, La Crete (Nov)
- Family New Year's (Dec)
- Bushee River Winter Carnival (Mar)
- La Crete Heritage Days, Tractor Show
- Snowmobile Rally's High Level (Boxing Day, Family Day, March Wrap up)
- Farmers Day 4H Achievement Day (June) Rocky Lane
- Bonspiels
- Golf & Hockey Tournaments
- Midnight Madness High Level, La Crete, Fort Vermilion

IV.2. Tourism SWOT Analysis

The results of the Tourism SWOT are presented in Table 1: REDI TOURISM SWOT.

The list of assets / strengths included in the table is a summary of the more detailed listing in Section IV.1. Tourism Assets / Strengths.

REDI Tourism SWOT Workshop Report

TABLE 1: REDI TOURISM SWOT

ASSETS / STRENGTHS	WEAKNESSES / CHALLENGES
<ul style="list-style-type: none"> • Wilderness (big game, birds, variety of wild berries, forests, rivers, lakes, natural beauty) • Major Landscape Features (Peace River, Boreal Forest, northern Prairie farmland, Buffalo Head Hills, Caribou Mountain, La Crete Sand Hills, Watt Mountain tower & viewpoints, Hay-Zama Lake, Paddle Prairie Jack Pine protected area, Wood Buffalo National Park) • Bird Sanctuaries / Bird life (variety, guiding, viewing, photography) • Hunting • 24 Hour Daylight in summer • Northern Lights • Active resource industries (oil & gas, forestry) bringing workers into area; young population • Fishing / boating on rivers and lakes (Lakes: Bistcho, Caribou, Chinchaga, Hutch, Margaret, Rainbow, Thurston, Wadlin, Wentzel, Zama; Rivers: Hay, Meander, Peace, Ponton, Steen) • Fly-in Fishing & lodges (Tapawingo Lodge on Bistcho Lake, Margaret Lake Lodge) • Extensive year round outdoor recreation opportunities & trails (e.g., snowmobiling, off road vehicles/quads, cross-country skiing, hiking, trail riding/equestrian, fishing, hunting, boating, kayaking, wildlife viewing, photography) • Groomed snowmobile trails (Watt Mountain Wanderers Snowmobile Club of High Level, La Crete Polar Cats Snowmobile Club , Rainbow Lake, Zama Lake) • Multi-cultural / ethnic communities, food (German Mennonite, Métis, First Nations, Filipino) • Museums (Mackenzie Crossroads Heritage Museum, High Level; La Crete Mennonite Heritage Village; Lean-To Museum /Archives & Visitor Log House, Fort Vermilion) • History / historic sites (Fort Vermilion fur trading/oldest settlement, North Vermilion Butter Town, Tompkins Landing/Ferry at La Crete, Eleske Shrine/pilgrimage, Alexander Mackenzie, Dr. Mary Jackson, wagon treks, Paddle Prairie graveyard, Indian Cabins) • Numerous campgrounds (serviced & informal throughout the region) • Golf courses (High Level, Rainbow Lake, Ft Vermilion, La Crete; planned in Zama, High Level) • Community recreation facilities (High Level Aquatic Centre & Sports Complex; Rainbow Lake Multi-use facility; Paddle Prairie Communaplex; La Crete Recreation Centre; Rocky Lane Indoor Riding Arena; various ball diamonds, skate board parks, outdoor rinks, boat launches & picnic areas throughout region) • Existing travel routes (Mackenzie Hwy, Deh Cho Travel Connection, AB N. Heritage Trail) • Airports (High Level, Rainbow Lake, La Crete, Fort Vermilion, Zama) • Scheduled air service out of High Level, Rainbow Lake; charter air services in area • Various local and regional events throughout the year • Educational / research institutions (NAIT, Northern Lakes College, Ft Vermilion Research Stn) 	<p>General</p> <ul style="list-style-type: none"> • Concerns re: terrorism / war (increased security and wait times at airports & border crossings) • Cost of oil and gas & impact on travel costs • General inflation of costs • Increasing strength of Canadian dollar (decrease inbound & increase outbound travel) • Current / impending economic downturn / recession • Labour supply shortages in service sector (attracting & retaining, salary levels, lack of bodies) • Insurance costs for adventure products / activities • Volunteer burn-out re: events, community based initiatives, etc <p>REDI Area Specific</p> <ul style="list-style-type: none"> • Distance from major markets / Accessibility for longer distance markets due to high fuel costs • Limited & expensive air access • Limited range of accommodation for tourism vs resource industry (B & B, farm vacations, lodges) • Other sectors strong, lower interest in tourism (lack motivation, apathy) • Demographic (younger, want to work for someone else, not to start on their own) • Road connections and paving (Hwy 88 paving; circle route completion; link to Ft Nelson) • Restoration of historic sites/ buildings, archaeological research needed • Insufficient recreation development (e.g., access to Caribou Mountain for quads) • No downhill ski area • Beautification of communities • Underused / under developed Peace River • Lack of product development funding • Limited web presence regarding area • Lack of major tourist attraction / major events • Lack of awareness/ visibility of REDI (lack of branding/theme) • Lack of fine dining throughout region • Few RV rest stops, serviced camping places (compete with work crews) • Limited number of people interested in developing tourism • Limited awareness of tourism and value of tourism (existing & benefits) & need to increase awareness in market place/provide viable product • Lack hard opportunity costs regarding tourism to compare to other resource values; lack of benchmarking information in tourism

REDI Tourism SWOT Workshop Report

TABLE 1: REDI TOURISM SWOT (Continued)

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Circle tours (e.g., Highway 35/697//58/88, Ft Nelson); self guided (guidebooks, maps, signs, CD, GPS) • Local knowledgeable guides (give talks to groups, lead tours) • Geo Tourism / Geo Caching (good link to circle tours, website) • Capture more of the pass through traffic on Mackenzie Highway; get them to stop in area • Additional serviced camping for RVs passing through area • B and B and other alternative accommodation (now 1 or 2 in area) • River tours on Peace River • New golf course and enhance existing golf courses • Packaging (e.g., stay and play, packaging accommodation, activities & events) • Horse riding / trail riding (guided, rentals) • Develop agricultural tourism experiences • Kayaking tours, events • Industrial tours / interpretive signing and programs (e.g., mills) • Aboriginal experience (trap lines, guided tours, arts / crafts, stay on reserve, foods) • Fishing / nature / photography • Northern lights tours • Travel Alberta funding (partnering / packaging) • Capitalize on Visiting Friends and Relatives market for newcomers to the REDI area • Increased immigration would broaden the diversity of the labour force. • Hosting meetings / conferences / gatherings • Develop additional winter experiences (dog sledding, winter survival, show shoeing) • Develop snowmobile route maps, guided tours/services, events • Develop fly-in breakfasts with flying clubs at airports, and include stay and play options (e.g., fishing, golf, accommodation, events) 	<ul style="list-style-type: none"> • Increased fuel costs / higher air fares may limit travel into the region from longer distance markets. • Economy • Provincial legislation and management of crown lands (e.g., FMAs, other resource allocations, protected areas limit opportunities for tourism) • Impact of Western Hemisphere Travel Initiative passport & visa regulations on visitors from USA • Climate, seasonality of tourism products • Health pandemics and diseases (SARS, Avian Flu) / effects of disasters elsewhere may limit travel • Exchange Rate fluctuations may impact on visitors (e.g., if the Canadian dollar remains high, it may limit inbound visitors from USA and may increase outbound travel by Canadians) • Competition (from BC, Southern Alberta) where there is more development and investment.

V. NEXT STEPS

This report from the tourism statistics review and SWOT workshop will be provided to members of the REDI Tourism Committee and REDI Board for their review and use.

If the REDI Tourism Committee and Board agree that they wish to pursue the preparation of a Regional Tourism Development Strategy for the REDI region, the following steps are suggested. The process outlined reflects what has been done in other regions of Alberta relative to developing a Regional Tourism Development Strategy.

1. Confirm the membership on the REDI Tourism Planning Committee to ensure that it reflects a broad cross-section of REDI and its members, but be a manageable size in terms of scheduling meetings and achieving results in workshop sessions.

It is suggested that consideration be given to ensuring that groups such as First Nations Administrations/Councils, tourism and visitor services operators (e.g., accommodation, food and beverage, tourism attractions), service clubs, museums/historical societies, etc., are involved in the committee and planning process, in addition to those already on the Tourism Committee.

It is important that the individuals that participate in the Tourism Planning Committee be able to commit to participating in all working sessions. They should also be prepared to share the ideas generated in the working sessions with the organization, group or community that they represent, and to also bring forward input from these community groups.

It is also recommended that a consultant be hired to facilitate the planning process and to assist in coordinating preparation of the Tourism Development Strategy. It is recognized that Tourism Committee members will likely be volunteers. As a result, having an individual who can take a lead in putting the plan together will ensure that it is completed in a timely fashion.

2. Identify possible funding sources to assist in developing the Regional Tourism Development Strategy. One possible source to contact is the Tourism Development Branch of Alberta Tourism, Parks and Recreation to discuss whether or not there may be funding support for development of the REDI Tourism Development Strategy. The Branch provided funding support to the Grande Alberta Economic Region in 2005/06 to assist them in preparing their Regional Tourism Development Strategy.

The contact in the Tourism Development Branch is:

Ms. Louise McGillivray
Executive Director
Tourism Development Branch
Alberta Tourism, Parks and Recreation
6th Floor, Commerce Place
10155 – 102 Street
Edmonton, AB T5J 4L6
Tel: 780-427-6638
Louise.mcgillivray@gov.ab.ca

REDI Tourism SWOT Workshop Report

3. Once a consultant / facilitator is in place, the Tourism Committee should meet to review the tourism statistics, trends, and SWOT Analysis provided in this document, and add any new information that may be available.

At this meeting, the Tourism Committee should determine a meeting schedule to work through the various tasks outlined below. It is anticipated that the process outlined below to prepare the Tourism Development Strategy will likely take from 3 to 5 meetings to complete. Additional meetings and efforts will then be required for follow-up related to specific opportunities.

The tasks to complete during this and subsequent meetings include the following:

- Review and discuss the tourism assets/strengths that were identified in the initial SWOT Analysis in terms of how well each relates to the markets and trends identified. Are there some that are particularly unique or significant?
- The opportunities that were identified in the SWOT Analysis should also be reviewed in light of the assets/strengths and constraints. Those opportunities that are felt to be most appropriate to consider further should be noted. These can be then sorted by categories (e.g., attractions, services, infrastructure, etc.).
- The list of opportunities should then be ranked in order of priority by category. Prior to ranking the opportunities, criteria for assessing their priority should be discussed and agreed upon by the Tourism Committee. Criteria could include such aspects as: attractiveness, uniqueness, cost and ease of implementation, concept already being considered, seasonal vs year round, and so on.
- The top rated opportunities can then be further ranked in terms of overall order of priority. This will then help the Tourism Committee in determining where to put their efforts in further assessing and implementing the opportunities.
- Each high ranked opportunity should then be briefly described in terms of such factors as: what it would look like, where it would be located, what markets it would attract; seasonality, etc.
- An individual high level SWOT Analysis can then be conducted for each top ranked opportunity, identifying areas where additional work may be required to overcome concerns or constraints. This should include identification of requirements (e.g., infrastructure, zoning, policy, land, investors/partners, etc.) that are necessary before the opportunity can be pursued further. Follow-up with individuals outside of the Tourism Committee may be required to obtain some of this information or to get input from others in the groups that Committee members represent.
- Once this is completed, the Committee can then begin to develop the Tourism Strategy Implementation / Action Plan. This could be summarized in a table format.

REDI Tourism SWOT Workshop Report

- Types of information to provide in the Action Plan include:
 - Opportunity name.
 - Brief description.
 - Lead individual / group to move it forward.
 - Specific actions or activities that are required (e.g., policy or zoning changes, land identification or acquisition, investment attraction, partnership development, product packaging and marketing, etc.).
 - Who is responsible for specific actions or activities (could include possible partners);.
 - Timelines.
 - Desired results of each activity or action and how performance or success will be measured.

Again, some information for this step may be required from others outside of the Tourism Committee, and it may require more than one meeting to complete.

- Once the Tourism Committee has completed drafting the plan, they need to determine how they will share and discuss it with the community and stakeholders.

This would likely include presenting the plan to the REDI Board to seek their endorsement of it.

It should also include holding one or more public meeting to discuss the results and priorities, and to seek assistance in moving forward with implementation.

VI. PARTICIPANTS IN TOURISM WORKSHOP, MARCH 18, 2008

The following individuals participated in the March 18, 2008 Workshop:

Jerry Chomiak, REDI and Town of High Level, jchomiak@telus.net

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Monalisa Calliou, Paddle Prairie Métis Settlement, monalisa-calliou@hotmail.com

Steve MacIntyre, Executive House Suite Hotel, High Level

Daniel Callaway, Firesky Golf, High Level

Jason Glabik, The Echo, glabikio@hotmail.com

Don Wilson, Travel Alberta, don.wilson@travelalberta.ca

Nicole Halvorsen, Mighty Peace Tourist Association, info@mightypeace.com

Jan Bloomfield, Strategy Plus (facilitator), bloomjian@telusplanet.net

APPENDICES

I.	Total Visitors to Alberta by Albertan and Out of Province Visitors	18
	I.1. Person Trips to Alberta by Visitor Origin.....	18
II.	Total Tourism Receipts in Alberta by Albertans and Out of Province Visitors	19
	II.1. Estimated Tourism Receipts (\$ millions) by Visitor Origin.....	19
	II.2. Spending by Market (Average Spending Per Person in Alberta on Overnight Visits – 2005).....	19
III.	Visitor Statistics to Alberta and Alberta North Tourism Destination Region	20
	III.1. International Visitors to Alberta (2004 - 2006)	20
	III.2. Canadian Visitors to Alberta (2002 – 2004).....	22
	III.3. International Visits to Alberta’s Tourism Destination Regions.....	24
	III.4. Albertan’s Visiting Alberta’s Tourism Destination Regions (2004)	25
IV.	Hotel Occupancy Statistics	27
	IV.1. Accommodation and Average Annual Hotel/Motel Occupancy by Region...27	
	IV.2. Source of Room Demand by Region (2003, 2004, 2005).....	27
V.	Market Segments – Alberta, BC, Saskatchewan	28
	V.1. Characteristics of Alberta Market Segments	28
	V.2: Activities of Interest to Market Segments	29
	V.3. Holiday Interest and Motivation - BC Study.....	30
	V.4. Holiday Interest and Motivation - Saskatchewan Study.....	32
	V.5. Holiday Interest and Motivation: Comparison of AB, BC, SK.....	35
V1.	Alberta Resident Market: In-Province Travel Behaviour Study	38
VII.	Northwest Territories 2006 Visitor Exit Survey Visiting Friends & Relatives	39
IX.	Trends and Potential Product/Market Match Assessment	43
IX.	REDI Community Tourism Action Plan (CTAP) Summaries	46

REDI Tourism SWOT Workshop Report

APPENDIX I - TOTAL VISITORS TO ALBERTA BY ALBERTANS AND OUT OF PROVINCE VISITORS

2001: 23.7 million person trips (increase of +4.9% over 2000, a peak year)

2002: 21.8 million person trips (decrease of -7.9% from 2001)

2003: 17.9 million person trips (decrease of -17.8% from 2002)

2004: 18.3 million person trips (increase of 2.4% from 2003)

2005: 18.8 million person trips (increase of 2.3% from 2004)

Table I.1. Person Trips to Alberta by Visitor Origin

Year	Alberta		Other Canada		USA		Other International		Total Person Trips	
	#	% of Total Trips	#	% of Total Trips	#	% of Total Trips	#	% of Total Trips	#	% Change from Previous Year
2000	17,347,000	76.9%	3,294,000	14.6%	1,069,000	4.7%	827,000	3.6%	22,537,000	-3.7%
2001	18,045,000	76.3%	3,740,000	15.8%	1,010,000	4.2%	854,000	3.6%	23,649,000	+4.9%
2002	16,515,000	75.8%	3,411,000	15.6%	1,073,000	4.9%	773,000	3.5%	21,772,000	-7.9%
2003	13,234,000	73.9%	3,086,000	17.2%	962,000	5.3%	613,000	3.4%	17,895,000	-17.8%
2004	13,317,000	72.6%	3,220,000	17.6%	1,026,000	5.6%	768,000	4.2%	18,331,000	+2.4%
2005*	13,650,000	72.8%	3,348,000	17.9%	957,000	5.1%	797,000	4.3%	18,752,000	+2.3%

Source: Alberta Economic Development Frequently Requested Alberta Tourism Statistics; Statistics Canada ITS, CTS

*2005 Data for Canadian provinces are estimates. 2005 International data are confirmed (actual). Due to a change in methodology in data collection by the Canadian Travel Survey, total person visits for 2000 and subsequent years are not comparable to previous years.

Albertans are the biggest tourism market for Alberta, accounting for around $\frac{3}{4}$ of all person trips in Alberta and about $\frac{1}{2}$ of all tourism receipts.

REDI Tourism SWOT Workshop Report

APPENDIX II - TOTAL TOURISM RECEIPTS IN ALBERTA BY ALBERTANS AND OUT OF PROVINCE VISITORS

Total Estimated Tourism Receipts in Alberta Expenditures in Alberta by Albertans

2001: \$5.4 billion (increase of +10.3%)	49.9% of expenditures by Albertans
2002: \$5.5 billion (increase of +1.5%)	54.0% of expenditures by Albertans
2003: \$4.3 billion (decrease of -20.4%)	48.2% of expenditures by Albertans
2004: \$5.0 billion (increase of 14.4%)	46.9% of expenditures by Albertans
2005: \$5.1 billion (increase of 3.4%)	48.3% of expenditures by Albertans

Table II.1. Estimated Tourism Receipts (\$ millions) by Visitor Origin

Year	Alberta (000)		Other Canada (000)		USA (000)		Other International (000)		Total Receipts (000)	% Change from Previous Year
	\$	%	\$	%	\$	%	\$	%		
2000	2,373	48.7%	1,062	21.8%	714	14.6%	714	14.6%	4,863	+9.4%
2001	2,681	49.9%	1,262	23.5%	716	13.3%	735	13.7%	5,364	+10.3%
2002	2,889	53.0%	1,192	21.8%	656	12.0%	711	13.0%	5,447	+1.5%
2003	2,089	48.2%	1,001	23.0%	675	15.5%	569	31.1%	4,334	-20.4%
2004	2,326	46.9%	1,154	23.3%	764	15.4%	714	14.4%	4,958	+14.4%
2005*	2,477	48.3%	1,229	24.0%	624	12.2%	796	15.5%	5,126	+3.4%

Source: Alberta Economic Development Frequently Requested Alberta Tourism Statistics; Statistics Canada ITS, CTS

*2005 Data for Canadian provinces are estimates. 2005 International data are confirmed (actual). Due to a change in methodology in data collection by the Canadian Travel Survey, total expenditures for 2000 and subsequent years are not comparable to previous years.

Table II.2. Spending by Market (Average Spending Per Person in Alberta on Overnight Visits - 2005)

Resident of:	Alberta	\$ 202	Saskatchewan	\$ 284
	British Columbia	\$ 313	Ontario	\$ 618
	United States	\$ 652	Japan	\$ 683
	Germany	\$957	United Kingdom	\$1,270

REDI Tourism SWOT Workshop Report

III - VISITOR STATISTICS TO ALBERTA AND ALBERTA NORTH TOURISM DESTINATION REGION

Table III.1: International Visitors to Alberta (2004-2006)

	United States			United Kingdom			Germany			Japan *		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
Sample Sizes												
	N/A	1,544	1,433	N/A	590	673	N/A	294	376	N/A	144	152
Total Visits to Alberta												
Total Visits to Alberta (000's)	1,182	1,095	1,056	241	247	239	87	90	77	88	109	85
Same Day Visits (000's)	157	138	121	13	22	15	12	5	8	1	*	1
Overnight Visits (000's)	1,026	957	935	228	225	224	76	85	69	87	109	84
Spending in Alberta (\$000,000)												
	\$774	\$637	\$670	\$254	\$287	\$304	\$68	\$82	\$87	\$67	\$74	\$78
Main Purpose of Overnight Visits on Trips												
Visit Friends or Relatives (000's)	206	211	198	49	40	56	7	12	9	11	11	14
Pleasure (000's)	509	453	449	155	157	147	61	62	50	66	79	58
Business (000's)	192	171	202	14	17	11	7	11	9	8	9	9
All Other (000's)	119	123	87	9	12	10	1	*	*	N/A	*	4
Person Visits to Alberta (%)												
Canadian Rockies	38.8	37.8	38.4	73.9	71.5	77.2	67.0	73.9	69.6	82.1	73.3	84.9
Calgary & Area	28.0	22.9	27.9	56.3	59.1	56.8	56.6	61.6	59.7	37.2	14.4	23.9
Edmonton & Area	34.3	38.5	31.8	14.6	13.1	13.4	16.1	13.9	17.1	14.5	14.6	14.6
Alberta's South	25.3	25.0	28.4	7.7	9.0	12.4	11.0	11.0	8.1	1.0	3.2	5.0
Central Alberta	11.1	10.7	7.0	8.2	5.4	6.2	5.4	5.9	6.6	0.3	*	1.2
Alberta's North	5.4	5.0	4.1	0.8	1.6	0.8	1.4	2.3	3.1	1.4	11.8	2.8
Other	1.8	1.8	2.0	1.2	0.9	0.6	N/A	0.6	1.0	0.6	*	*
Average Number of Nights in Alberta (regardless of purpose of trip)												
	4.9	4.7	4.7	9.4	11.0	10.0	7.9	8.8	8.6	3.1	3.2	5.7
Type of Accommodation Used on the Trip (Average Nights per User)												
Hotel	3.5	3.5	3.5	5.4	5.8	5.4	4.4	5.4	5.0	2.9	2.5	2.8
Motel	2.7	2.6	2.6	3.5	4.1	1.9	4.1	2.6	3.2	1.7	1.9	1.9
Camping/Trailer Park	4.7	3.9	4.3	7.0	4.9	5.3	5.9	6.8	5.4	N/A	3.0	7.0
Commercial Cottage/Cabin	3.8	3.7	3.0	5.3	3.0	3.9	4.6	8.8	3.9	2.6	4.0	*
Average Travel Party Size												
	2.0	1.9	2.0	1.9	1.8	1.9	1.9	1.9	1.9	1.8	1.5	1.5

REDI Tourism SWOT Workshop Report

Table III.1 International Visitors to Alberta (2004-2006) - Continued

	United States			United Kingdom			Germany			Japan		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
Average Age of the Travel Party												
	49.7	50.4	51.1	45.8	46.9	47.4	42.8	41.1	42.3	43.2	43.9	45.5
Activities Participated in During the Entire Trip (%)												
Visiting Friends or Relatives	33.7	36.0	30.0	47.1	46.3	50.6	39.3	37.4	37.1	30.5	21.6	25.2
Shopping	69.0	65.3	63.5	92.3	92.1	93.6	88.3	92.2	91.0	80.3	84.3	83.3
Sightseeing	56.2	56.4	56.4	88.6	88.9	89.3	87.8	85.5	81.0	82.6	84.2	87.5
Attend Aboriginal/Native Culture	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Visit National or Provincial Park	46.4	46.4	48.2	84.3	84.9	83.6	86.4	86.0	82.4	69.7	73.8	82.8
Visit Historic Site	37.6	36.6	36.4	50.4	51.5	54.9	63.1	60.9	49.2	13.3	24.7	12.5
Golfing	5.8	2.2	4.7	5.7	5.0	5.7	3.7	1.3	2.1	3.4	1.0	0.9
Fishing	4.0	3.8	3.5	5.5	1.6	1.7	8.7	3.6	5.6	N/A	*	0.5
Cross-Country Skiing	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Downhill Skiing/Snowboarding	3.0	5.0	3.2	17.6	17.2	13.0	9.5	8.0	9.3	6.9	1.2	4.1
Other Sport/Outdoor Activity	11.2	10.8	15.1	14.4	17.4	17.3	17.2	21.4	27.2	9.0	7.5	7.4
Age of Travel Party (%)												
0 - 14 Years	5.8	6.9	6.4	6.3	4.0	5.3	5.0	4.0	5.1	1.5	2.2	1.0
15 - 24 Years	5.3	3.6	3.4	8.0	6.3	7.1	8.4	6.3	10.5	8.7	8.3	7.1
25 - 44 Years	21.3	19.5	18.6	30.4	34.3	32.5	38.4	34.3	38.8	43.2	44.6	39.6
45 - 64 Years	45.2	47.8	48.4	37.7	38.1	37.5	39.0	38.1	35.1	38.0	29.6	38.6
65+ Years	22.4	22.1	23.3	17.6	17.5	16.6	9.4	17.5	10.4	8.6	15.4	13.8
Education of the Respondent - Not Available												
Household Income - Not Available												
Gender of the Travel Party (%)												
Male	54.1	52.7	54.2	51.3	50.0	48.3	52.0	51.5	54.1	49.2	42.4	36.9
Female	45.9	47.3	45.8	48.7	50.0	51.7	48.0	48.5	45.9	50.8	57.6	63.1
N/A=Not Available. * Insufficient Sample Size.												
Source: Tourism in Alberta - 2004 Overseas Tourism, 2004 American Tourism;												
Tourism in Alberta – 2004, Overseas Tourism, 2004 American Tourism												
2005 International Travel Survey, Alberta Economic Development (Research Resolutions & Consulting Ltd.)												
Tourism in Alberta – 2005, Overseas Tourism, 2005 American Tourism												
2006 International Travel Survey, Alberta Economic Development (Research Resolutions & Consulting Ltd.)												
Tourism in Alberta – 2006, Overseas Tourism, 2006 American Tourism												
2006 International Travel Survey, Alberta Economic Development (Research Resolutions & Consulting Ltd.)												

REDI Tourism SWOT Workshop Report

Table III.2: Canadian Visitors to Alberta (2002-2004)

	Alberta			British Columbia			Saskatchewan			Ontario			Other Canada		
	2002	2003	2004	2002	2003	2004	2002	2003	2004	2002	2003	2004	2002	2003	2004
Total Visits to Alberta															
Total Visits to Alberta (000's)	16,515	13,234	13,317	1,253	1,258	1,302	1,228	953	913	503	509	580	427	366	425
Same Day Visits (000's)	8,654	7,504	6,859	230	208	193	341	225	146	N/A	5	N/A	3	4	2
Overnight Visits (000's)	7,861	5,730	6,458	1,023	1,050	1,109	887	727	767	503	504	580	424	362	423
Total Visits with Alberta as the Main Destination of the Trip															
Total Visits to Alberta (000's)	16,168	13,053	13,086	1,152	1,158	1,173	1,130	882	838	377	400	442	258	285	351
Same Day Visits (000's)	8,654	7,504	6,859	230	208	193	341	225	146	N/A	5	N/A	N/A	4	2
Overnight Visits (000's)	7,514	5,549	6,227	922	950	979	789	657	692	377	394	442	355	277	349
Spending in Alberta (\$000,000)															
	\$1,574	\$1,087	\$1,874	\$351	\$355	\$373	\$221	\$196	\$231	\$296	\$246	\$358	\$253	\$159	\$193
Main Purpose of Overnight Visits on Trips															
Visit Friends or Relatives (000's)	2,792	2,059	2,243	461	493	554	390	292	367	166	254	213	132	136	174
Pleasure (000's)	3,147	2,313	2,427	287	260	245	290	240	237	123	97	138	170	126	129
Business (000's)	1,037	667	788	135	140	150	69	92	79	175	115	199	81	74	81
All Other (000's)	885	691	769	140	156	160	138	103	185	39	37	30	41	26	40
Average Number of Night on the Trip (regardless of purpose of trip)															
	2.5	2.5	2.4	4.7	5.6	4.7	3.7	3.6	3.3	6.9	6.1	6.4	9.3	7.3	7.6
Type of Accommodation Used on the Trip (Average Nights per User)															
Hotel	1.9	1.9	1.9	2.6	2.5	2.6	2.5	2.6	2.3	3.5	3.5	3.7	4.3	3.3	3.9
Motel	1.9	2.1	2.0	2.6	2.3	3.3	2.1	1.8	2.0	5.7	4.1	3.7	4.0	3.2	2.2
Camping/Trailer Park	3.1	3.4	3.0	6.4	5.2	2.9	3.6	4.2	5.6	3.6	3.1	3.4	8.8	8.7	4.9
Resorts	1.9	2.7	3.4	4.0	2.0	4.0	2.0	4.7	3.8	4.6	4.1	3.6	4.5	*	N/A
Commercial Cottage/Cabin	2.4	2.7	2.7	N/A	1.0	N/A	4.9	2.6	3.3	2.0	1.2	3.0	5.5	*	N/A
Gender of Respondent (%)															
Male	42.0	40.0	41.3	41.0	40.3	41.5	38.6	39.4	43.4	49.5	42.8	56.4	49.2	42.4	48.3
Female	39.6	42.7	40.1	45.6	47.7	43.2	44.0	46.2	43.1	40.1	47.2	36.7	42.6	49.5	43.4
Under 15**	18.3	17.3	18.6	13.3	12.0	15.2	17.4	14.4	13.5	10.5	10.0	6.9	8.2	8.0	8.4
Household Income (%)															
Children under 15**	18.3	15.8	18.6	13.3	13.4	15.2	17.4	16.9	13.5	10.5	10.5	6.9	N/A	N/A	N/A
Under \$20,000	7.5	7.1	7.0	8.0	6.8	4.2	9.2	10.3	8.3	3.7	3.7	3.2	N/A	N/A	N/A
\$20,000-\$39,999	13.5	14.9	14.0	17.4	17.0	14.8	16.6	15.3	16.3	9.8	9.8	6.7	N/A	N/A	N/A
\$40,000-\$59,999	14.0	15.2	13.7	18.3	19.2	17.0	19.1	20.3	19.9	15.1	15.1	11.1	N/A	N/A	N/A
\$60,000-\$79,999	12.8	13.3	13.1	10.0	11.0	12.6	11.2	11.3	13.0	10.2	10.2	16.8	N/A	N/A	N/A
\$80,000 +	22.5	21.2	23.1	22.7	23.1	23.6	15.3	15.4	17.8	38.7	38.7	45.4	N/A	N/A	N/A

REDI Tourism SWOT Workshop Report

Table III-2: Canadian Visitors to Alberta (2002-2004) – Continued

	Alberta			British Columbia			Saskatchewan			Ontario			Other Canada		
	2002	2003	2004	2002	2003	2004	2002	2003	2004	2002	2003	2004	2002	2003	2004
Activities Participated in During the Entire Trip (%)															
Visiting Friends or Relatives	63.6	50.6	52.4	70.8	65.9	74.5	77.3	65.5	69.7	64.3	72.5	69.4	73.2	69.8	78.2
Shopping	40.0	34.4	36.4	56.5	53.0	54.4	61.9	60.1	60.6	56.4	53.6	54.8	63.8	72.9	65.0
Sightseeing	26.7	18.4	17.7	35.7	32.4	24.9	39.8	26.6	28.1	54.7	56.2	50.8	64.2	59.5	57.0
Attend Aboriginal/Native Culture	1.1	0.6	0.8	3.2	1.4	0.6	1.3	0.9	1.3	4.5	3.6	3.7	6.5	6.1	4.5
Visit National or Provincial Park	16.6	11.3	12.2	20.0	15.6	17.7	16.0	10.6	11.2	40.2	34.0	37.0	44.6	40.3	40.3
Visit Historic Site	6.5	3.8	4.8	13.4	8.1	7.7	9.5	4.7	7.9	32.2	18.3	24.6	22.7	24.8	21.9
Golfing	3.5	2.0	2.1	4.8	2.4	3.3	2.7	4.2	2.6	6.7	4.8	4.5	8.7	5.1	2.8
Fishing	3.8	2.6	2.6	0.6	1.8	1.5	1.0	1.1	1.2	2.0	1.3	4.0	0.2	2.6	0.6
Bird/Wildlife Watching	1.7	1.0	1.7	1.5	2.6	1.4	0.3	1.1	0.8	9.6	3.2	6.8	5.8	5.0	2.6
Cross-Country Skiing	0.4	0.3	0.6	0.2	0.5	0.6	N/A	0.4	0.2	1.1	1.7	1.3	0.6	N/A	N/A
Downhill Skiing	2.4	3.1	4.7	1.1	0.9	1.4	3.3	2.0	2.6	7.6	6.9	7.3	9.6	6.9	8.1
Snowmobiling	0.6	0.5	0.5	0.1	0.1	0.7	0.4	0.3	0.1	N/A	N/A	0.1	0.4	N/A	N/A
Walking/Hiking	15.9	9.5	11.5	15.7	10.5	10.1	7.9	9.7	9.8	18.2	18.2	25.5	28.3	23.1	28.9
Cycling	4.1	1.3	1.8	2.4	1.1	3.2	0.9	1.0	1.4	2.4	2.5	6.2	2.9	4.1	2.1
Other Sport/ Outdoor Activity	11.6	8.8	8.6	8.1	5.8	6.0	9.2	11.2	7.8	9.3	9.0	10.3	7.4	10.5	6.6
Average Travel Party Size															
	1.7	1.7	1.7	1.6	1.5	1.6	1.8	1.7	1.6	1.4	1.5	1.3	1.4	1.4	1.4
Age of Respondent (%)															
0 – 14 Years	18.3	17.3	18.6	13.3	12.0	15.2	17.4	14.4	13.5	10.5	10.0	6.9	N/A	N/A	N/A
15 – 24 Years	14.8	15.0	14.2	14.2	14.0	10.1	15.4	14.0	17.1	8.9	12.6	7.4	N/A	N/A	N/A
25 – 44 Years	38.8	37.3	34.3	31.6	28.0	31.6	30.6	28.3	29.6	36.3	35.1	40.5	N/A	N/A	N/A
45 – 64 Years	22.4	24.1	26.7	31.6	37.0	31.6	27.7	31.0	27.7	33.9	30.2	34.4	N/A	N/A	N/A
65+ Years	2.7	6.3	6.2	9.7	9.0	11.4	8.9	11.3	11.9	10.4	12.1	10.7	N/A	N/A	N/A
Average Age of Respondent¹															
	33.7	34.4	34.8	38.4	39.6	39.5	36.3	38.5	38.0	41.0	40.4	32.3	N/A	N/A	40.8
Education of the Respondent (%)															
Children under 15**	18.3	17.3	18.6	13.3	12.0	15.2	17.4	14.4	13.5	10.5	10.0	6.9	8.2	12.3*	8.4*
Some Secondary	10.3	9.8	10.2	16.3	11.0	9.3	13.5	14.4	13.3	7.5	6.9	12.9	13.7	9.0*	9.6*
Graduated from High School	13.1	14.7	15.6	14.8	15.6	17.0	15.2	15.4	17.4	8.6	17.8	16.1	12.6	17.4*	10.9*
Some Post-Secondary	8.6	10.4	8.5	8.4	14.1	15.4	6.6	7.5	7.1	4.7	9.6	5.6	4.5	4.5*	7.6*
Post-Secondary Diploma	29.6	28.8	28.0	27.6	26.5	24.4	28.7	26.2	28.1	22.7	20.5	21.2	30.5	31.5*	30.1*
University Degree	17.4	16.0	17.3	18.0	19.6	16.7	15.3	18.0	17.3	43.3	32.5	35.2	28.0	27.1*	29.7*
N/A=Not Available * Insufficient sample size **Respondents <15 years of age are not asked their gender or income. Note: Numbers are rounded to nearest decimal point.															
Source: Tourism in Alberta – 2002, 2003 & 2004 Domestic Tourism Alberta Residents & Other Canadians; 2002, 2003, & 2004 Canadian Travel Survey, Alberta Economic Development (Research Resolutions & Consulting Ltd.)															

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Table III.3: International Visits to Alberta's Tourism Destination Regions (2004 to 2006)

Total Visits	United States			United Kingdom			Germany			Japan*		
	2004	2005	2006	2004	2005	2006	2004	2005	2006	2004	2005	2006
Total Visits to Alberta	1,182,000	1,095,000	1,056,000	241,000	247,000	239,000	87,000	90,000	77,000	88,000	109,000	85,000
Total Visits to Alberta North	63,828	54,750	43,296	1,928	3,952	1,912	1,218	2,070	2,387	1,232	12,862	2,380
Percent of Visits to Alberta	%	%	%	%	%	%	%	%	%	%	%	%
Canadian Rockies	38.8	37.8	38.4	73.9	71.5	77.2	67.0	73.9	69.6	82.1	73.3	84.9
Calgary & Area	28.0	22.9	27.9	56.3	59.1	56.8	56.6	61.6	59.7	37.2	14.4	23.9
Edmonton & Area	34.3	38.5	31.8	14.6	13.1	13.4	16.1	13.9	17.1	14.5	14.6	14.6
Alberta South	25.3	25.0	28.4	7.7	9.0	12.4	11.0	11.0	8.1	1.0	3.2	5.0
Alberta Central	11.1	10.7	7.0	8.2	5.4	6.2	5.4	5.9	6.6	0.3	*	1.2
Alberta North	5.4	5.0	4.1	0.8	1.6	0.8	1.4	2.3	3.1	1.4	11.8	2.8

*Use data with caution due to the small sample size. Percentage totals do not equal 100% since visitors may visit more than one TDR.

Source: Tourism in Alberta – 2004 Domestic Tourism Alberta Residents & Other Canada

2004, 2005 & 2006 International Travel Survey, Alberta Economic Development, Research Resolutions & Consulting

REDI Tourism SWOT Workshop Report

Table III.4 - Albertans Visiting Alberta's Tourism Regions (2004)

	Total Alberta	Alberta North	Alberta Central	Edmonton & Area	Rocky Mountains	Calgary & Area	Alberta South
Total Visits to Alberta							
Total Visits to Alberta (000's)	13,317	1,143	3,525	2,960	1,729	2,204	1,862
Same Day Visits (000's)	6,859	577	1,737	1,591	1,002	1,020	868
Overnight Visits (000's)	6,458	566	1,788	1,368	727	1,185	994
Total Visits with Alberta as the Main Destination of the Trip							
Total Visits to Alberta (000's)	13,086	1,113	3,424	2,860	1,662	2,089	1,786
Same Day Visits (000's)	6,859	577	1,737	1,591	1,002	1,020	868
Overnight Visits (000's)	6,227	537	1,678	1,269	660	1,069	918
Spending in Alberta (\$000,000)							
	\$1,873.8	\$170.1	\$304.1	\$445.4	\$196.9	\$279.5	\$199.8
Main Purpose of Overnight Visits on Trips							
Visit Friends or Relatives (000's)	2,311	178	735	469	73	486	398
Pleasure (000's)	2,569	177	712	423	589	345	424
Business (000's)	799	131	163	215	39	169	104
All Other (000's)	779	81	178	262	25	186	69
Total Person Visits Within Alberta by Region Visited (000s)							
	6,458	566	1,788	1,368	727	1,185	994
Albertans Traveling Within Alberta (%)							
Total Alberta (origin)	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Alberta's North	11.2	24.8	5.6	26.9	5.0	4.7	1.8
Central Alberta	22.3	19.7	22.5	36.5	12.7	21.4	10.7
Edmonton & Area	30.2	34.2	45.9	0.1	40.5	46.9	12.1
Alberta's Rockies	0.2	N/A	0.2	0.1	0.1	0.8	0.3
Calgary & Area	25.4	10.9	19.5	31.0	37.9	2.8	51.0
Alberta's South	10.7	0.5	6.3	5.4	3.8	20.7	24.1
Average Number of Night on the Trip (regardless of purpose of trip)							
	2.4	3.1	2.3	2.1	2.3	2.0	2.4
Type of Accommodation Used on the Trip (Average Nights per User)							
Hotel	1.9	2.4	2.0	1.9	2.1	1.5	1.7
Motel	2.0	1.6	1.8	1.5	2.3	1.3	2.0
Camping/Trailer Park	3.0	3.7	2.9	2.2	2.3	2.6	3.9
Resorts	3.4	N/A	1.0	N/A	3.7	8.0	N/A
Commercial Cottage/Cabin	3.0	7.0	3.7	1.5	2.8	N/A	2.1
Age of Respondent (%)							
0-14	18.6	21.6	20.2	16.5	19.6	15.4	21.1
15-24	14.2	13.2	15.0	11.1	19.0	15.5	11.3
25-44	34.3	33.9	32.1	38.5	35.3	33.8	31.7
45-64	26.8	26.6	26.4	17.4	21.5	28.6	29.0
65+	6.2	4.9	6.4	6.5	4.6	6.9	6.7

REDI Tourism SWOT Workshop Report

Table III.4: Albertans Visiting Alberta's Tourism Regions (2004) (Continued)

	Total Alberta	Alberta North	Alberta Central	Edmonton & Area	Rocky Mountains	Calgary & Area	Alberta South
Average Age of Respondent							
	34.8	33.3	34.4	36.3	32.0	35.9	34.7
Activities Participated in During the Entire Trip (%)							
Visiting Friends or Relatives	52.4	49.2	60.6	54.0	24.3	61.7	51.6
Shopping	36.4	37.3	26.6	60.8	25.9	37.5	29.7
Sightseeing	17.7	10.2	12.6	11.7	46.2	16.8	21.0
Attend Aboriginal/ Native Culture	0.8	2.3	0.4	0.7	0.5	1.0	1.5
Visit National or Provincial Park	12.2	3.1	5.0	2.1	58.6	5.2	15.1
Visit Historic Site	4.8	1.9	2.3	3.3	15.1	3.6	7.9
Golfing	2.1	0.8	3.7	1.2	1.9	1.3	2.5
Fishing	2.6	8.4	3.4	0.1	1.1	1.0	4.7
Bird/Wildlife Watching	1.7	1.9	2.6	0.2	3.2	0.4	2.3
Cross-Country Skiing	0.6	0.7	N/A	N/A	3.1	0.6	0.2
Downhill Skiing	4.7	0.6	0.3	0.2	34.1	0.6	0.4
Walking/Hiking	11.5	9.3	11.3	3.8	28.9	8.1	13.3
Visit Museum	3.4	2.2	2.4	2.7	6.0	4.1	6.9
Other Sport/Outdoor Activity	8.6	5.5	12.4	5.5	4.8	8.0	11.7
Average Travel Party Size							
	1.7	1.7	1.7	1.7	1.8	1.6	1.7
Education of the Respondent (%)							
Children under 15	18.6	3.5	1.7	1.6	0.8	1.7	2.1
Some Secondary	10.2	10.8	9.3	13.0	9.3	8.6	8.5
Graduated from High School	15.6	15.0	16.8	20.2	11.7	14.5	13.1
Some Post-Secondary	8.5	7.6	11.7	6.9	6.3	9.1	6.4
Post-Secondary Diploma	28.0	30.3	27.0	24.8	18.9	32.8	35.9
University Degree	17.3	11.4	13.3	16.9	33.3	17.9	13.0
Gender of Respondent (%)							
Male	41.3	41.5	38.2	42.4	40.9	43.4	41.9
Female	40.1	37.1	41.6	41.1	39.5	41.2	37.0
Under 15**	18.6	21.5	20.2	16.5	19.6	15.4	21.1
Household Income (%)							
Under \$20,000	7.0	6.8	9.4	5.6	4.0	7.8	6.5
\$20,000-\$39,999	14.0	16.0	12.9	14.2	7.6	14.4	19.5
\$40,000-\$59,999	13.7	12.9	12.2	15.7	12.5	13.7	14.6
\$60,000-\$79,999	13.1	12.1	14.1	14.6	10.6	14.0	10.0
\$80,000 +	23.1	19.9	21.7	22.9	23.1	14.7	18.3
*Insufficient Sample Size ** Respondents under 15 years of age are not asked their gender.							
Source: Tourism in Alberta –2004, Domestic Tourism Alberta Residents & Other Canadians, 2004 Canadian Travel Survey, Alberta Economic Development (Research Resolutions & Consulting Ltd)							

REDI Tourism SWOT Workshop Report

APPENDIX IV - HOTEL OCCUPANCY STATISTICS

Table IV.1: Accommodation & Average Annual Hotel/Motel Occupancy By Region & City (2003, 2004 & 2005)

Region	Properties						Rooms						Average Occupancy Rate (%) based on sample of properties		
	Number of Hotels in Survey			% of Total Hotels in Survey			Number of Rooms in Survey			% of Total Rooms in Survey			2003	2004	2005
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005			
Alberta North	71	73	72	10.5	10.7	10.6	5,127	5,496	5,426	10.5	10.5	10.3	65.5	72.3	77.5
AB Central	199	191	192	29.4	28.2	28.5	9,152	8,981	9,202	18.7	17.1	17.4	60.0	66.5	73.5
Edmonton & Area	85	103	101	12.5	15.2	15.0	8,527	11,405	11,486	17.4	21.8	21.8	63.4	65.4	71.1
Can Rockies	115	110	111	17.0	16.2	16.4	9,723	9,812	9,876	19.9	18.5	18.7	60.8	61.4	65.2
Calgary & Area	87	83	86	12.8	12.2	12.7	10,834	11,077	11,337	22.2	20.7	21.0	64.2	67.0	71.6
Alberta South	118	117	111	17.4	17.2	16.4	5,402	5,530	5,321	11.0	10.5	10.1	60.2	61.3	60.4
Total Alberta	675	677	673	99.6	99.7	99.6	48,765	52,301	52,648	99.7	99.1	99.3	61.8	65.4	70.3
Banff	39	37	40	N/A	N/A	N/A	4,007	4,046	4,189	N/A	N/A	N/A	63.8	64.1	64.5
Calgary	74	67	66	N/A	N/A	N/A	10,262	10,438	10,507	N/A	N/A	N/A	64.6	66.3	71.4
Canmore	37	33	30	N/A	N/A	N/A	1,739	1,774	1,679	N/A	N/A	N/A	50.8	49.2	59.9
Edmonton	57	71	70	N/A	N/A	N/A	6,714	9,373	9,306	N/A	N/A	N/A	64.4	65.1	68.7
Grande Prairie	14	14	15	N/A	N/A	N/A	1,523	1,579	1,601	N/A	N/A	N/A	N/A	N/A	83.0
Hinton	18	18	17	N/A	N/A	N/A	746	723	731	N/A	N/A	N/A	53.3	N/A	86.2
Jasper	24	26	26	N/A	N/A	N/A	2,285	2,331	2,326	N/A	N/A	N/A	69.6	72.4	71.7

Source: Alberta Economic Development: Alberta Accommodation Statistics, 2002, 2003 & 2004

Table IV.2: Source of Room Demand by Region & City (2003, 2004 & 2005)

Region	Industrial Crews (%)			Business Travelers (%)			Tourists (%)			Tour Groups (%)			Convention Groups (%)			Other (%)		
	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005	2003	2004	2005
Alberta North	54.8	56.3	56.6	26.1	30.6	29.9	13.5	8.1	7.6	0.7	0.5	1.0	1.7	1.7	1.5	3.3	2.7	3.3
AB Central	48.6	54.0	59.0	20.8	20.9	19.4	15.2	14.5	12.3	1.2	0.6	0.6	4.0	1.9	1.8	10.2	7.3	7.0
Edmonton & Area	11.8	19.6	21.4	43.9	40.5	41.3	28.7	20.4	23.6	2.2	1.7	1.0	5.8	5.3	4.2	7.7	12.6	8.4
Can Rockies	2.2	3.0	4.4	2.7	3.9	5.3	62.4	69.9	62.0	21.7	15.6	22.2	6.6	4.8	4.4	4.4	3.0	1.8
Calgary & Area	12.9	11.4	15.6	41.2	47.4	42.4	25.6	27.3	26.6	8.0	4.6	3.2	5.7	3.2	4.5	7.2	6.1	7.7
Alberta South	49.7	51.7	48.0	16.2	18.2	23.5	24.9	24.5	24.5	2.3	1.4	0.8	1.5	1.7	0.9	5.3	5.0	3.2
Total Alberta	32.3	34.2	37.3	23.8	25.9	27.1	27.3	26.7	23.5	5.6	3.8	3.6	4.2	3.1	2.8	6.8	6.5	5.8
Banff	0.6	2.6	0.2	2.4	3.0	6.1	55.7	61.8	52.0	30.8	22.3	31.5	5.9	8.0	6.8	4.5	2.4	3.5
Calgary	6.4	6.2	8.8	46.8	50.8	46.9	26.0	28.4	27.5	9.3	5.0	3.7	5.1	3.7	5.1	7.0	5.9	8.0
Canmore	5.2	5.1	11.8	2.2	7.3	4.7	67.4	77.8	73.4	10.9	6.8	6.8	7.7	1.2	2.7	6.7	3.0	0.7
Edmonton	6.3	11.8	16.2	43.5	45.2	41.7	36.0	22.6	27.2	2.6	2.0	1.3	4.6	5.9	6.0	6.9	12.5	7.7
Grande Prairie	N/A	N/A	50.9	N/A	N/A	27.7	N/A	N/A	11.7	N/A	N/A	3.3	N/A	N/A	4.1	N/A	N/A	2.3
Hinton	N/A	N/A	72.7	N/A	N/A	6.9	N/A	N/A	16.0	N/A	N/A	1.0	N/A	N/A	0	N/A	N/A	3.4
Jasper	0.9	2.3	2.4	3.4	1.8	0.8	65.9	76.9	60.6	21.1	13.5	29.5	6.4	3.7	5.3	2.2	2.6	1.4

Source: Alberta Accommodation Statistics, Alberta Economic Development. 2003, 2004 & 2005.

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APPENDIX V – MARKET SEGMENTS (ALBERTA, BC, SASKATCHEWAN)

Table V.1: Characteristics of Alberta Market Segments (2004)

	Accomplishers	Urban Explorers	Comfort Seekers	Real Relaxers
Segment Size	28%	21%	24%	27%
Annual Spending	\$4,674	\$4,016	\$3,790	\$3,240
Number of 3-7 day trips in past year	1.95	1.79	2.03	1.82
% Choosing Alberta as destination	38%	32%	51%	42%
Demographics	<ul style="list-style-type: none"> • 55% married • 32% - children <18 • Average age 42 years 	<ul style="list-style-type: none"> • 56% married • 40% - children <18 • 31% - 30 yrs old or younger 	<ul style="list-style-type: none"> • 79% married • 62% - children <18 • 63% - 31 – 50 yrs old 	<ul style="list-style-type: none"> • 69% married • 44% - children <18 • 53% - 41 – 60 yrs old
Top Benefits Sought	<ul style="list-style-type: none"> • See new places (93%) • Do new things (70%) • Get away from daily routine (59%) • Relax (52%) • Participate in outdoor activities (45%) • Willing to spend most / trip 	<ul style="list-style-type: none"> • Get away from daily routine (81%) • See new places (75%) • Relax (68%) • Have fun with friends (66%) • Do new things (38%) 	<ul style="list-style-type: none"> • Get away from daily routine (80%) • Relax (80%) • Strengthen family bonds (71%) • Have fun with friends (57%) • Participate in outdoor activities (55%) 	<ul style="list-style-type: none"> • Relax (91%) • Get away from daily routine (87%) • Peace & quiet (66%) • See new places (56%) • Strengthen family bonds (45%)
Preferences	<ul style="list-style-type: none"> • Unfamiliar (78%) • Action (74%) • Rural (73%) • Excitement (64%) 	<ul style="list-style-type: none"> • City (79%) • Excitement (78%) • Action (77%) • Unfamiliar (60%) 	<ul style="list-style-type: none"> • Rural (81%) • Familiar (72%) • Action (61%) • Tranquil (59%) 	<ul style="list-style-type: none"> • Tranquil (93%) • Do nothing (82%) • Rural (78%) • Familiar (70%)
Differentiating Key Drivers	<ul style="list-style-type: none"> • See new places • Participate in outdoor activities • Prefer rural & exotic locations 	<ul style="list-style-type: none"> • Desire bustling, cosmopolitan atmosphere • Prefer city & exotic locations 	<ul style="list-style-type: none"> • Participate in outdoor activities • Prefer rural locations 	<ul style="list-style-type: none"> • Desire peace & quiet • Prefer rural locations
Segment Sizes	Calgary (29%) Edmonton (30%) Other Alberta (25%)	Calgary (22%) Edmonton (21%) Other Alberta (20%)	Calgary (22%) Edmonton (23%) Other Alberta (26%)	Calgary (26%) Edmonton (26%) Other Alberta (29%)

Source: Alberta Resident Interest and Motivation Study, Alberta Economic Development, 2004

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Table V.2: Activities of Interest to Alberta Market Segments

Activity	Total Alberta (% of Respondents)	Accomplishers (% of Respondents)	Urban Explorers (% of Respondents)	Comfort Seekers (% of Respondents)	Real Relaxers (% of Respondents)
Rest/relaxation & recuperation from daily routine	71	68	63	71	79
Visit Friends and Relatives	59	56	58	65	58
Outdoor recreation (camping, hiking, backpacking)	47	55	23	60	45
Outdoor summer sports (golf, quads, bicycle, riding)	43	45	35	51	40
Indoor leisure (shopping, casinos, nightclubs, indoor amusement, water parks)	40	37	54	35	37
Resort towns and attractions	40	46	39	37	36
Urban sports (run, walk, cycle on streets and paths)	36	42	29	40	32
Outdoor leisure (bird watching, sight seeing, spectator events)	30	37	19	36	25
Visit museums, historic sites	26	37	22	24	20
Cultural activities, events (music, film, theatre festivals, concerts, galleries)	22	29	26	21	14
Outdoor winter sports (skiing, snowmobiling)	18	24	14	23	9
Outdoor adventure (kayaking, rock climbing, river rafting)	16	25	11	18	10
Taking part in agri- tourism activities (working farm, rodeos, country fair, farmer's markets)	14	18	9	18	11
Visit sites - Aboriginal culture, history	12	18	7	10	20

Source: Alberta Resident Interest and Motivation Study, Alberta Economic Development, 2004

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Table V.3: HOLIDAY TRAVEL INTEREST AND MOTIVATION - BRITISH COLUMBIA STUDY

- Respondents were residents of British Columbia, a decision-maker in their household, were at least 18 years old, had taken at least one 3-7 day leisure trip (80km away from home) in the past 2 years or plan to take a trip in the next year.
- 933 respondents completed the web survey
- Study same as that conducted for Alberta and Saskatchewan residents (see comparison of results in I.1.4.)

Travel Segments	Accomplishers	Urban Explorers	Comfort Seekers	Real Relaxers
Segment Size	31%	22%	21%	26%
Description	Looking for the new & unfamiliar. Like some action & excitement	Get away from routine. Likes to see new & exciting places, city locations	Strongly prefer the familiar & rural locations. Seek relaxation & get away & strengthen family bonds	Want tranquility, peace and quiet. Prefer to do nothing during their leisure trips
Emotional Benefits Sought	See new places (94%)	Get away from the daily routine (82%)	Get away from the daily routine (78%)	Relax (93%)
Emotional Benefits Preferences	Outdoor (94%) Action (86%) Exotic (79%)	City (81%) Action (81%) Excitement (78%)	Outdoor (87%) Familiar (71%) Rural (67%)	Tranquil (87%) Outdoor (76%) Familiar (73%) Do nothing (72%)
Destination of Last Trip	Alberta (42%) Saskatchewan (22%) British Columbia (11%)	Alberta (47%) Saskatchewan (18%) British Columbia (13%)	Alberta (49%) Saskatchewan (22%)	Alberta (43%) Saskatchewan (45%) British Columbia (13%)
Destination of future trip	Alberta (74%) British Columbia (46%) Saskatchewan (45%)	Alberta (76%) British Columbia (41%) Saskatchewan (35%)	Alberta (74%) Saskatchewan (42%) British Columbia (40%)	Alberta (76%) Saskatchewan (45%) British Columbia (37%)
Reasons Would Consider Alberta as Future Travel Destination				
Visit family or friends	38%	36%	36%	33%
Inexpensive accommodation/packages	22%	25%	22%	20%
Specific Event, Attraction	33%	52%	25%	35%
Reasons for Considering Alberta in Travel Destination Plans	-VFR (53%) -Visit event/attraction (31%) -Beautiful scenery (19%)	-VFR (74%) -Visit event/ attraction (26%)	-VFR (64%) - Visit event/attraction (27%)	- VFR (77%) - Visit event/attraction (19%) - Scenery (17%)
Opportunity	Biggest segment willing to spend the most/trip.	New places to visit in particular new cities	Outdoor, relaxing locations outside cities	"do nothing", relax, get away from daily routine

REDI Tourism SWOT Workshop Report

Table V.3: HOLIDAY TRAVEL INTEREST AND MOTIVATION - BRITISH COLUMBIA STUDY (Continued)

	Accomplishers	Urban Explorers	Comfort Seekers	Real Relaxers
Messaging	Need to know that Alberta is <i>the</i> place to go for outdoor active vacations	Unique and less familiar cities. Getting to know & see new urbanscapes & activities	Needs to be educated that Alberta is accessible & relaxing with lots of opportunities to experience the outdoors.	Alberta is easily accessible, no planning involved, relaxing destination with lots of outdoor opportunities.
Trip Characteristics				
Average # of 1-2 day trips	3.7	2.99	3.25	2.46
Average # of 3-7 day trips in the past year	1.96	1.74	1.98	1.9
Average # of 8+ day trips in the past year	1.45	0.86	1.36	1.08
% revisited primary destination of last 3-7 day leisure trip	73%	81%	82%	79%
Travel Parties				
• Spouse	66%	65%	67%	68%
• Children	28%	28%	47%	32%
• Friends	22%	19%	18%	13%
Accommodation Used on Last 3-7 day Trip				
• Hotel/motel	42%	46%	38%	34%
• Family/Friends	43%	52%	45%	42%
• Camping	27%	11%	28%	28%
Annual Household Spending on Trip	\$4,507	\$3,778	\$3,279	\$3,023
Top 3 Activities Extremely Likely To Participate In On Next 3-7 Day Leisure Trip	1.VFR 2.Outdoor recreation 3.Visit museums/historic sites	1. VFR 2. Indoor leisure 3. Outdoor leisure activities	1.VFR 2.Outdoor recreation 3.Outdoor leisure activities	1.VFR 2.Outdoor leisure activities 3.Outdoor recreation
Gender	Male 40% Female 60%	Male 66% Female 34%	Male 64% Female 36%	Male 68% Female 32%
Marital Status	Married 62% Single - never married 14% ; Divorced 9%	Married 58% Single-never married 20%; Divorced 8%	Married 73% Single-never married 10%; Divorced 7%	Married 63% Single-never married 13%; Divorced 8%
Children under 18 at home	37%	33%	52%	32%
Average of Respondent	43.6 yrs	42.5 yrs	44.9 yrs	48.0 yrs
Average Household Income	\$73,705	\$70,603	\$65,758	\$66,342

Source: Advanis, 2005, Holiday Travel Interest and Motivation British Columbia Study, Travel Alberta In-Province

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Table V.4: HOLIDAY TRAVEL INTEREST AND MOTIVATION - SASKATCHEWAN STUDY

- Respondents were residents of Saskatchewan, a decision-maker in their household, were at least 18 years old, had taken at least one 3-7 day leisure trip (80km away from home) in the past 2 years or plan to take a trip in the next year.
- 1008 respondents completed the web survey
- Compared to the overall Saskatchewan population respondents tended to female (61% vs. 50%), married/common-law (71% vs. 47%), fewer children under 18 in the household (44% vs. 61%), older with an average age 44.6 years compared to 36.7 years, have a higher average income (\$69,658 vs. \$63,463)
- Study same as that conducted for Alberta and British Columbia residents (see comparison of results in I.1.4.)

Travel Segments	Accomplishers	Urban Explorers	Comfort Seekers	Real Relaxers
Segment Size	22%	29%	25%	24%
Description	Looking for the new & unfamiliar. Like some action & excitement	Get away from routine. Likes to see new & exciting places, city locations	Strongly prefer the familiar & rural locations. Seek relaxation & get away & strengthen family bonds	Wants tranquility, peace and quiet. Prefer to do nothing during their leisure trips
Emotional Benefits Sought	See new places (94%)	Get away from the daily routine (82%)	Get away from the daily routine (78%)	Relax (93%)
Emotional Benefits Preferences	Outdoor (94%) Action (86%) Exotic (79%)	City (81%) Action (81%) Excitement (78%)	Outdoor (87%) Familiar (71%) Rural (67%)	Tranquil (87%) Outdoor (76%) Familiar (73%) Do nothing (72%)
Destination of Last Trip	Alberta (42%) Saskatchewan (22%) British Columbia (11%)	Alberta (47%) Saskatchewan (18%) British Columbia (13%)	Alberta (49%) Saskatchewan (22%)	Alberta (43%) Saskatchewan (45%) British Columbia (13%)
Destination of future trip	Alberta (74%) British Columbia (46%) Saskatchewan (45%)	Alberta (76%) British Columbia (41%) Saskatchewan (35%)	Alberta (74%) Saskatchewan (42%) British Columbia (40%)	Alberta (76%) Saskatchewan (45%) British Columbia (37%)

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Table V.4: HOLIDAY TRAVEL INTEREST AND MOTIVATION - SASKATCHEWAN STUDY (Continued)

	Accomplishers	Urban Explorers	Comfort Seekers	Real Relaxers
Reasons Would Consider Alberta as Future Travel Destination				
Visit family or friends	20%	32%	29%	34%
Inexpensive accommodations/packages	16%	15%	22%	16%
Specific Event, Attraction	32%	19%	31%	14%
Reasons for Considering Alberta in Travel Destination Plans	-Visit family, friends -Beautiful scenery -Visit event/attraction	-Visit family, friends -Visit event/attraction -Alberta is my home/backyard pride -Convenience	-Visit family, friends - Alberta is my home/backyard pride - Visit event/attraction	- Visit family, friends - Visit event/attraction - Beautiful scenery
Opportunity	Smallest segment but willing to spend the most. More likely to pursue outdoor summer adventure, outdoor leisure activities, cultural activities, visit aboriginal culture/history	Largest segment. Family plays a bigger role	Like outdoors and familiar locations. Important to connect with their family	Want to do nothing, relax, get away from daily routine, enjoy peace and quiet. Want to feel safe and comfortable
Messaging	Alberta the place to go for an outdoor, active vacation. Advertise specific outdoor activities and cultural events.	Attracted to urban centres of Edmonton, & Calgary. Focus on indoor leisure activities.	Home away from home., a place where they can return to relax, experience the outdoors, spend time with family/friends	Alberta involves little planning & provides relaxing vacation destination with lots of outdoor opportunities to experience peace & quiet.
Trip Characteristics				
Average # of 1-2 day trips	3.98	3.31	3.81	3.54
Average # of 3-7 day trips in the past year	2.2	2.17	2.12	2.3
Average # of 8+ day trips in the past year	1.59	0.84	0.89	0.86
% revisited primary destination of last 3-7 day leisure trip	72%	82%	82%	86%

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Table V.4: HOLIDAY TRAVEL INTEREST AND MOTIVATION - SASKATCHEWAN STUDY (Continued)

	Accomplishers	Urban Explorers	Comfort Seekers	Real Relaxers
Travel Parties				
• Spouse	62%	71%	74%	81%
• Children	32%	39%	51%	38%
• Friends	21%	16%	14%	11%
Accommodation Used on Last 3-7 day Trip				
• Hotel/motel	47%	44%	39%	36%
• Family/Friends	46%	54%	56%	43%
• Camping	18%	10%	17%	22%
Annual Household Spending on Trip	\$3,671	\$3,087	\$2,962	\$3,073
Top 3 Activities Extremely Likely To Participate In On Next 3-7 Day Leisure Trip	<ol style="list-style-type: none"> 1. Visit friends/relatives 2. Indoor leisure activities 3. Outdoor leisure activities 	<ol style="list-style-type: none"> 1. Visit friends/relatives 2. Indoor leisure activities 3. Outdoor summer sports 	<ol style="list-style-type: none"> 1. Visit friends/relatives 2. Indoor leisure activities 3. Visit museums or historic sites 	<ol style="list-style-type: none"> 1. Visit friends/relatives 2. Indoor leisure activities 3. Outdoor recreation
Gender	Male 40% Female 60%	Male 37% Female 63%	Male 40% Female 60%	Male 63% Female 38%
Marital Status	Married 61% Single-never married 19% Divorced 8%	Married 68% Single-never married 17% Divorced 6%	Married 79% Single-never married 4% Divorced 7%	Married 74% Single-never married 8% Divorced 5%
Children under 18 at home	30%	46%	57%	40%
Average of Respondent	44.0	42.5	45.7	46.4
Average Household Income	\$68,306	\$72,866	\$65,021	\$71,861

Source: Advanis, 2005, Holiday Travel Interest and Motivation Saskatchewan Study, Travel Alberta In-Province

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Table V.5: Holiday Interest & Motivation Study: Comparison of Alberta, British Columbia & Saskatchewan Results

Factor	Accomplishers			Urban Explorers			Comfort Seekers			Real Relaxers		
	AB %	BC %	SK %	AB %	BC %	SK %	AB %	BC %	SK %	AB %	BC %	SK %
% of Respondents	28	31	22	21	22	29	24	21	25	27	26	24
Household spending on leisure trip												
Up to \$1,000	20	21	21	26	23	32	27	30	37	35	34	36
\$1,001-\$2,000	16	14	21%	13	16	20	21	18	18	19	21	19
\$2001 - \$3,000	15	16	15%	18	14	15	13	15	14	14	14	13
\$3,001-\$5,000	18	21	24%	20	26	16	17	23	16	16	15	13
\$5,001-\$10,000	22	20	16%	15	17	14	18	12	13	11	14	16
>\$10,001	9	8	3%	7	3	3	5	3	2	5	2	3
Average	\$4,635	\$4,507	\$3,671	\$3,993	\$3,778	\$3,087	\$3,759	\$3,279	\$2,962	\$3,230	\$3,023	\$3,073
On last 3-7 day trip traveled with:												
Spouse/Partner	63	66	62	58	65	71	77	67	74	70	68	81
Children	28	28	32	29	28	39	55	47	51	39	32	38
Friends	25	22	21	25	19	16	20	18	14	17	13	11
Extended Family	17	11	18	13	15	15	18	14	22	16	15	15
Alone	10	13	10	11	13	11	6	9	6	8	10	8
Accommodation on last 3-7 day trip												
Hotel	41	42	47	53	46	44	38	38	39	34	34	36
Family/Friends	33	43	46	43	52	54	38	45	56	37	42	43
Camping	26	27	18	12	11	10	33	28	17	28	28	22
Motel	18	18	12	11	11	9	14	16	13	13	17	15
B & B	6	5	4	3	4	3	2	6	2	3	7	1

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Table V.5: Holiday Interest & Motivation Study: Comparison of Alberta, British Columbia & Saskatchewan Results (Cont'd)

Factor	Accomplishers			Urban Explorers			Comfort Seekers			Real Relaxers		
	AB %	BC %	SK %	AB %	BC %	SK %	AB %	BC %	SK %	AB %	BC %	SK %
Activities Likely to Participate in on next 3-7 day trip												
VFR	56	61	71	58	66	76	65	70	80	58	64	77
Outdoor Recreation	55	51	50	23	28	21	60	52	48	45	40	36
Summer recreation	45	36	41	35	22	34	51	40	41	40	28	29
Urban sports	42	40	35	29	27	25	40	35	34	32	29	24
Visit museum, Historic Sites	37	46	39	22	30	18	24	33	34	20	29	23
Indoor leisure	37	41	56	54	65	71	35	39	56	37	37	49
Outdoor leisure	37	45	47	19	34	22	36	46	35	25	41	32
Cultural activities	29	38	27	26	32	19	21	18	15	14	22	12
Summer adventure	25	28	24	11	12	6	18	20	12	10	12	9
Winter sports	24	20	18	14	12	8	23	17	14	9	10	5
Visit Aboriginal culture/history	18	27	16	7	11	2	10	10	8	10	14	3
Spectator sports	8	13	12	8	9	16	11	11	10	5	5	6
Urban team sports	6	6	10	9	4	9	11	9	8	5	6	7
Agri-Tourism	N/A	15	16	N/A	12	8	N/A	13	10	N/A	12	7
Winter Adventure	N/A	9	4	N/A	4	1	N/A	6	2	N/A	1	1
Why Visit Alberta												
VFR	16	54	66	28	74	66	23	64	68	23	77	68
AB is Home	18	5	4	13	4	4	15	6	4	16	2	3
Scenery	39	19	31	34	7	18	40	12	23	39	17	18
Convenience	30	12	14	30	9	18	32	9	9	37	5	9
Inexpensive / Economical	17	5	7	14	3	5	18	3	2	16	7	6
Outdoor Activities	21	10	13	10	5	4	19	6	10	7	5	9
Friendly people/ child friendly	4	3	3	1	3	3	6	3	4	3	4	4
Event/ attraction	9	13	26	9	26	2	6	27	23	1	19	16
Camping	10	0	0	7	0	0	14	0	0	13	0	0
Other	4	22	21	5	20	27	4	17	17	5	16	19

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Table V.5: Holiday Interest & Motivation Study: Comparison of Alberta, British Columbia & Saskatchewan Results (Cont'd)

Factor	Accomplishers			Urban Explorers			Comfort Seekers			Real Relaxers		
	AB %	BC %	SK %	AB %	BC %	SK %	AB %	BC %	SK %	AB %	BC %	SK %
Demographics												
Female	55	60	60	62	66	63	54	64	60	67	68	63
Male	45	40	40	38	34	37	46	36	40	33	32	38
Marital Status												
Married	55	62	61	56	58	68	79	73	79	69	63	74
Single	22	14	19	23	20	17	8	10	4	11	13	8
Divorced	10	9	8	7	8	6	4	7	7	6	8	5
Common Law	9	11	8	8	10	5	5	3	5	10	8	8
Separated	3	3	2	3	1	2	2	5	3	3	4	1
Widowed	2	2	3	3	3	1	1	2	2	2	5	4
Children <18 at home												
Yes	32	37	30	40	33	46	62	52	57	44	32	40
No	68	63	70	60	67	54	38	48	43	56	68	60
Respondent Age												
<30 yr	20	17	21	29	24	21	14	11	10	11	11	9
31 – 30 yr	25	23	17	22	22	26	32	25	27	27	15	23
41-50 yr	26	26	27	23	19	25	32	31	30	33	25	32
51-60 yr	20	23	26	18	22	16	16	19	20	21	32	23
61-70 yr	8	9	7	6	9	9	3	11	11	7	12	10
71-80 yr	2	1	2	3	3	2	3	3	2	1	5	2
<80 yr	0	1	0	0	0	0	0	0	0	0	0	0
Respondent Average Age	43.2	44.6	44.0	41.2	43.5	2.5	42.5	45.9	5.7	4.3	49.0	46.4
Household Income												
<\$25K	9	7	10%	11	9	8	5	12	9	7	11	6
\$25K - <\$50K	28	26	33%	26	34	29	23	34	35	24	34	31
\$50K - <\$100K	41	50	41%	43	40	44	46	39	44	49	40	47
\$100K +	22	17	16%	20	18	18	26	15	12	21	15	16
Average Income	\$75,867	\$73,705	\$68,306	\$73,713	\$70,603	\$72,866	\$83,127	\$65,758	\$65,021	\$77,494	\$66,342	\$71,861

Source: Advanis. December 2004. *Alberta Leisure Travel Intentions Study* for Alberta Economic Development; Advanis, June 2005, *Holiday Travel Interest and Motivation Saskatchewan Study* for Travel Alberta; Advanis, 2005, *Holiday Travel Interest and Motivation British Columbia Study* for Travel Alberta

APPENDIX VI - 2002 Alberta Resident Market: In-Province Travel Behaviour Study

- Conducted for AB Economic Development by The International Results Group (April 2003)
- Identified 5 market segments, including:

1. Free to Go – Cost-Conscious, Empty Nester:

- Oldest cluster, average household incomes, and 2nd fewest number of children living at home.
- Represents 19% of Alberta's travel market
- Primarily urban, with 59% living in Calgary and Edmonton.
- Predominately male; average age of 45 years and fewer children than other clusters.
- Influenced to travel by VFR, cost and value received for money spent, safety and security concerns, weather. When visiting family and friends, they are least likely to stay in their homes
- Don't like surprises, travel for rest and relaxation, visiting, outdoor recreation activities.
- Enjoy sightseeing / scenery, but also seek activities; not likely to participate in indoor activities.
- Rely on past experiences / word of mouth; have flexible schedules and are short term planners.

2. Affluent/Career-minded – Mobile Family:

- Youngest cluster, including adult students, and having higher incomes and fewer children.
- 21% of Alberta market, and is primarily urban, with 57% from Edmonton, Calgary and the north.
- Primarily female, with an average age of 39 years.
- Job focused, influenced in travel by school holidays, budget, safety and security, weather, VFR, quality of accommodation, variety of activities at the destination, job schedules.
- Like to escape daily routine, eat well, spend time with family, relax, VFR, outdoor activities.
- Have the longest planning and scheduling cycle of all clusters.

3. Affluent Kids and Cul-de-Sacs:

- Highest income cluster; most active; Primarily urban (Calgary and Edmonton)
- 16% of AB travel market; primarily male, average age of 42 years and married with children.
- VFR, attending children's sports and competitions, family-oriented activities are priorities
- Participate in variety of activities (not spectators); not participate in indoor leisure activities.
- Rely more on previous experience in travel decisions, and are strong repeat customers.
- Have a short planning period of 1 to 2 weeks.

4. Metro Single Adventurers:

- Represents retirees, as well as younger trades, professionals and management.
- Slightly lower incomes than some other clusters, and represent 16% of the Alberta market.
- Primarily urban, from Edmonton, Calgary and Central Alberta.
- Primarily female, with an average age of 44.5 years and have fewer children
- Influenced by cost and value for money spent, and are most interested in packages or coupons
- Flexible to travel on short notice, and are informed travelers.

5. Metro, Kid-Centric Mommies:

- Middle incomes, a larger number of children in the household and a cautious approach to travel.
- Least urban cluster; 27% of AB market; primarily female (avg 42.6 yrs); married with children.
- Wide range of travel interests, both large city and small town events and attractions.
- Active and outdoor oriented; mothers in cluster more likely to participate in summer sports (golf, bike riding, quads) and summer recreational activities (camping, hiking)
- Longer term planners, and packages, discounts and coupons are important factors.
- Most likely to travel outside of Alberta (e.g., to British Columbia).

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APPENDIX VII - Northwest Territories 2006 Visitor Exit Survey - Visiting Friends & Relatives

(Excerpts from NWT Industry, Tourism and Investment, October 2007)

Highlights of Survey:

- Survey of travelers to NWT who came to visit family and friends completed between May 15 and September 15, 2006
- Included 6,217 travelers (about 17% of all travelers to NWT)
- 95% were from Canada: Alberta (40%); BC (18%); Ontario (15%); 48% visiting NWT for the first time
- 2.3% from USA (Washington highest with 30.8%, followed by NY (22%), Alaska/ California/ Georgia / Michigan / Montana / Tennessee / Texas (all with 11% - very small sample)
- Slightly more than half (53%) were female
- Average age of VFR travelers was 45.5 years (majority either 51 – 60 or 21 – 30 years old)
- VFR travelers are fairly well educated (59% have at least a college diploma)
- VFR travelers tend to be retired, professionals or have occupations in education industry
- Annual household incomes between \$30,000 - \$70,000

Reason for Visiting NWT

Reason for Choosing the NWT	Percent
Family or friends	85.6%
General interest	35.8%
Wilderness, isolation, landscape or wildlife	27.8%
Always wanted to visit	20.7%
Culture or history	13.3%
Natural phenomenon, event, or attraction	9.5%
Fishing	9.4%
Other	7.1%
Hunting	0.9%

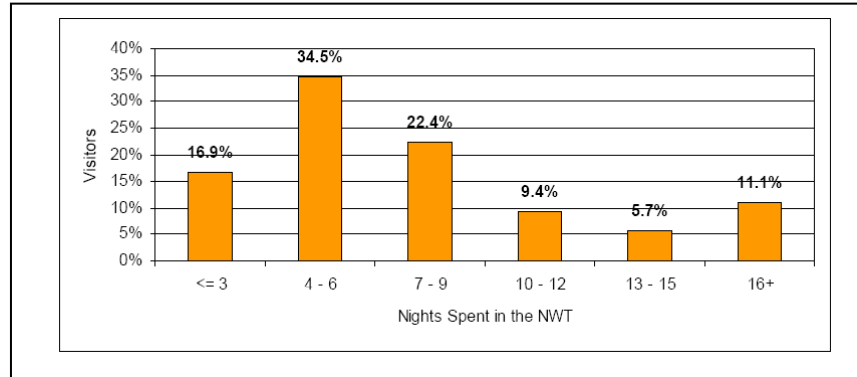
- Nearly 70% of VFR travelers visited Alberta during their trip to NWT; 25% visited BC as well
- Traditional arts and crafts a popular purchase item: total spending on these items was almost double that of other souvenirs

Visitor Numbers to NWT by Origin & Mode of Transportation

Visitor Segment	Air				Road				TOTAL
	Canada	USA	Other	TOTAL	Canada	USA	Other	TOTAL	
Fishing	1,754	1,983	83	3,820	1,471	14	-	1,485	5,305
General Touring	1,546	60	95	1,702	8,367	1,277	1,994	11,638	13,340
Hunting	153	830	83	1,066	61	84	5	150	1,216
Outdoor Adventure	705	153	153	1,011	727	312	29	1,068	2,079
Visiting Friends & Relatives	2,910	33	176	3,119	2,988	110	-	3,098	6,217
Total Leisure	7,068	3,059	591	10,718	13,614	1,797	2,028	17,439	28,157
Business	6,262	529	150	6,940	815	8	36	859	7,800
TOTAL	13,330	3,587	740	17,658	14,429	1,806	2,064	18,298	35,956

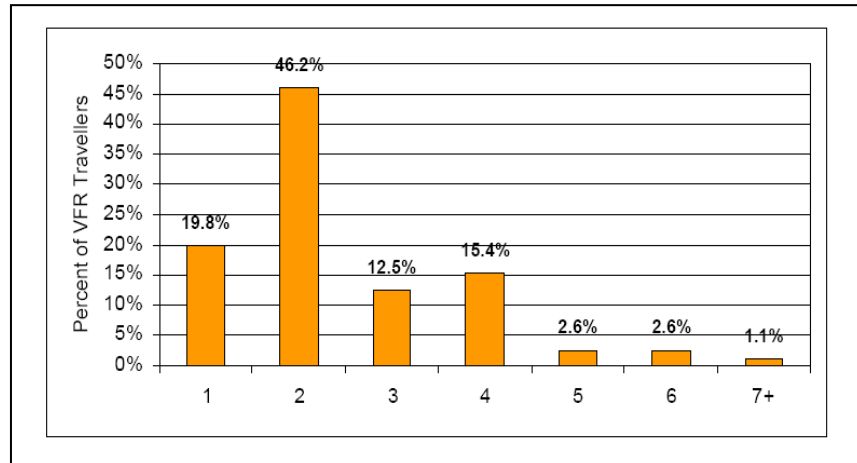
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Number of Nights Spent in the NWT

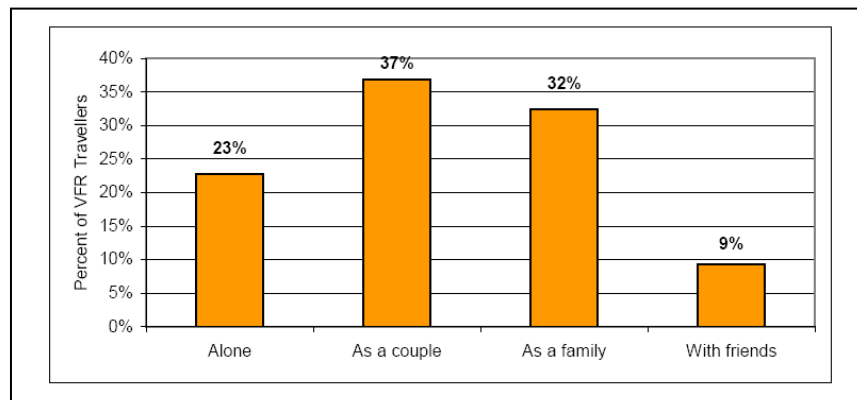


- Length of trip: VFR travelers spent an average of 10 nights in the NWT, slightly longer than the 9 night average for all travelers

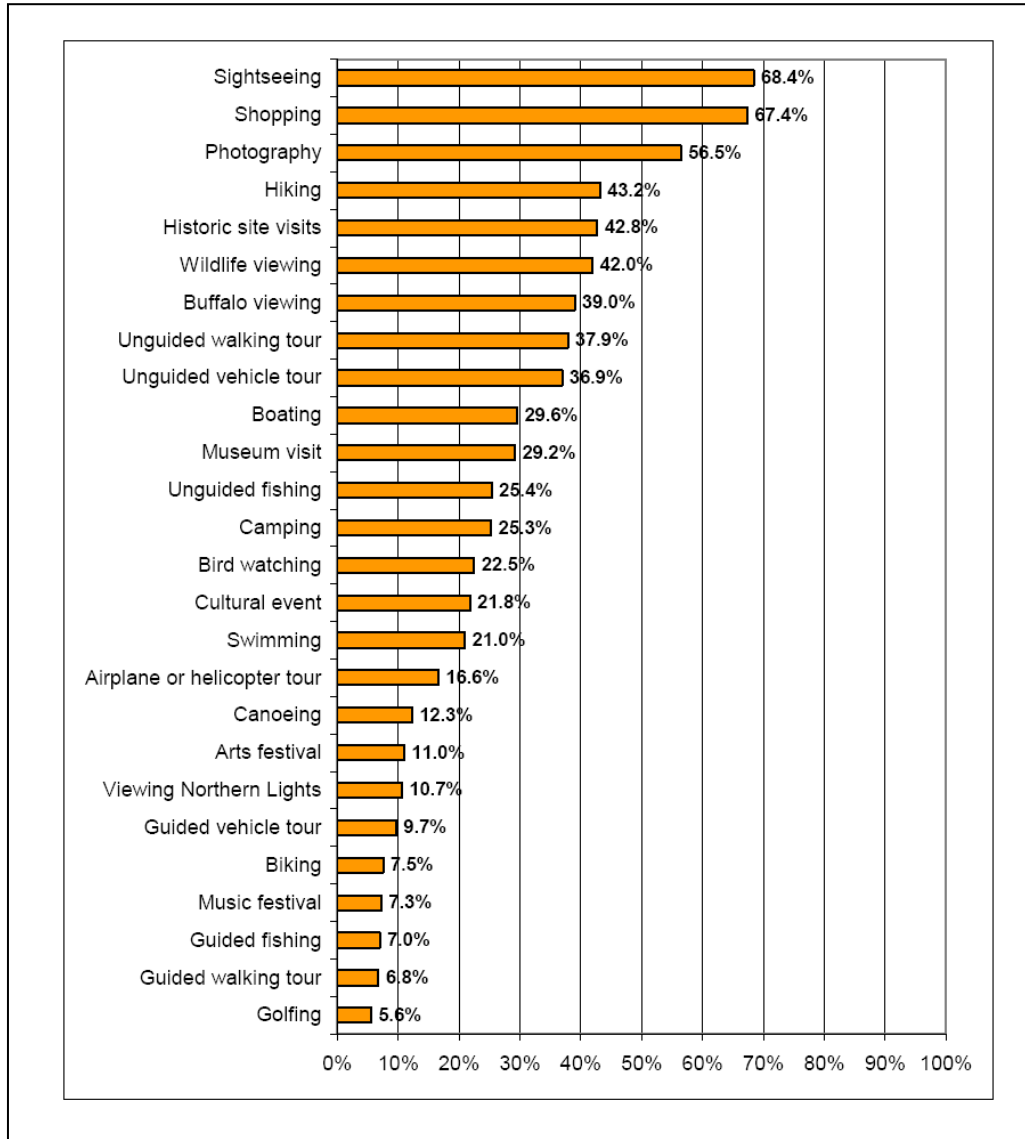
Average Party Size



Party Characteristics



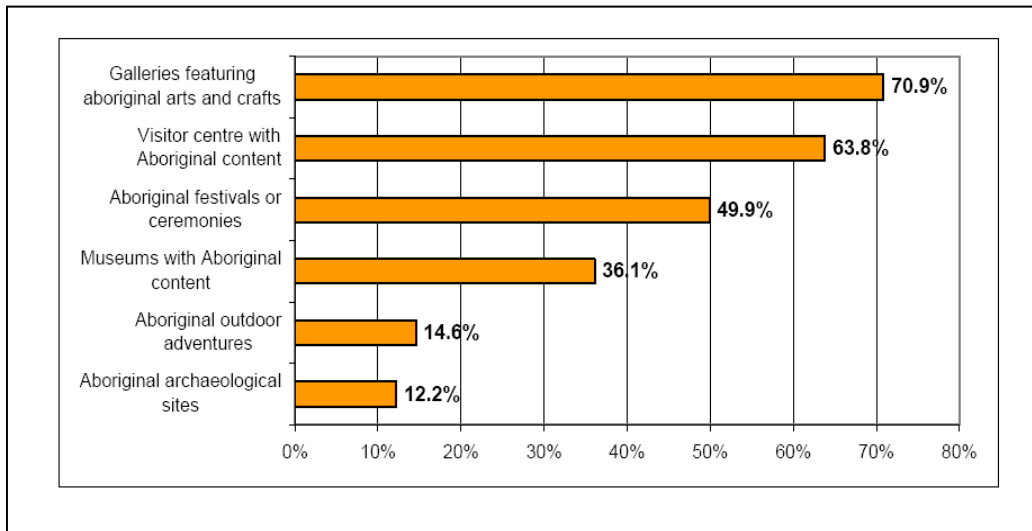
Activity Participation



- 27% participated in some sort of Aboriginal event or activity during their stay

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Participation in Aboriginal Tourism Activities and Events



Total Trip Expenditures by Segment and Mode of Travel while in NWT

Segment	Air				Road				Total
	Canada	USA	Other	Total	Canada	USA	Other	Total	
VFR	\$ 1,896,724	\$ 44,791	\$ 126,237	\$ 2,067,752	\$ 995,205	\$ 53,603	\$ -	\$ 1,048,808	\$ 3,116,560
Hunting	\$ 85,178	\$ 977,456	\$ 104,306	\$ 1,166,941	\$ 19,171	\$ 59,463	\$ 13,471	\$ 92,105	\$ 1,259,046
Outdoor Adventure	\$ 858,500	\$ 210,633	\$ 98,644	\$ 1,167,777	\$ 575,954	\$ 731,907	\$ 10,944	\$ 1,318,804	\$ 2,486,581
Fishing	\$ 1,112,691	\$ 1,486,908	\$ 143,690	\$ 2,743,289	\$ 567,096	\$ 2,973	\$ -	\$ 570,069	\$ 3,313,357
General Touring	\$ 1,027,016	\$ 58,073	\$ 61,167	\$ 1,146,256	\$ 4,012,819	\$ 562,457	\$ 1,212,645	\$ 5,787,921	\$ 6,934,177
Total Leisure	\$ 4,980,110	\$ 2,777,861	\$ 534,043	\$ 8,292,014	\$ 6,170,245	\$ 1,410,402	\$ 1,237,061	\$ 8,817,707	\$ 17,109,721
Business	\$ 26,078,327	\$ 1,821,216	\$ 620,472	\$ 28,520,016	\$ 3,002,304	\$ 4,054	\$ 92,069	\$ 3,098,427	\$ 31,618,442
Total	\$ 31,058,437	\$ 4,599,077	\$ 1,154,515	\$ 36,812,029	\$ 9,172,548	\$ 1,414,456	\$ 1,329,130	\$ 11,916,134	\$ 48,728,164

Trip Expenditures by Category of Spending & Mode of Travel

Expenditures		Average Spending	Total
In NWT:	Commercial Accommodation	\$ 46	\$ 280,557
	Camping	\$ 12	\$ 74,601
	Entertainment	\$ 41	\$ 206,212
	Arts & Crafts (prints, carvings)	\$ 54	\$ 312,756
	Souvenirs (mugs, t-shirts, pins)	\$ 30	\$ 172,448
	Tours	\$ 19	\$ 147,318
	Groceries	\$ 48	\$ 276,316
	Fuel	\$ 69	\$ 352,757
	Restaurants	\$ 73	\$ 407,441
	Vehicle / Boat Rental	\$ 8	\$ 55,138
	Airfare	\$ 112	\$ 786,878
	Other	\$ 10	\$ 44,138
Total spending while in NWT		\$ 522	\$ 3,116,560
Cost to get to NWT		\$ 745	\$ 4,011,807
Prepaid Package Cost		\$ 28	\$ 245,991

REDI Tourism SWOT Workshop Report

APPENDIX VIII – TOURISM TRENDS AND POTENTIAL PRODUCT / MARKET ASSESSMENT

Northwest Alberta REDI Trends and Potential Products / Market Assessment				
Trend	Associated Activities	Associated Facilities	Potential Market(s)	Potential Tourism Opportunities
<p>Shorter trips, but greater frequency of travel (greater fragmentation of holidays)</p> <p>Travel closer to home & less by air (may be impacted by rising fuel prices)</p> <p>Simplify lives by buying all-inclusive events/trips</p>	<p>Themed programs. Special Events, Experiential activities</p> <p>Spa type getaways</p> <p>Casinos</p> <p>Auto touring & sightseeing, Circle Tours, Guide books/ CDs for theme tours</p>	<p>Accommodation and food and beverage facilities</p> <p>Spa facilities</p> <p>Attractions, museums, historic sites</p> <p>Interpretive signage re themed routes, pull outs, view points</p>	<p>W. Canada: Accomplishers, Comfort Seekers, Real Relaxers</p> <p>Pacific Northwest and Western USA</p>	<p>Small luxury resorts, inns, guest ranches, B & B, fixed roof accommodation</p> <p>Spa facilities, services Related experiential services (golf, guided biking/hiking)</p> <p>Circle tours / themed tours with pull off, viewpoints, CD guides, services</p>
<p>Interest in spa vacations - interest for all groups, highest increase by males</p>	<p>Spas, hot pool experience & treatments</p> <p>Fitness Program</p> <p>Recreational activities, such as golf, biking, skiing</p>	<p>Spas, hot pools</p> <p>Fixed roof accommodation, serviced campgrounds for RVs</p> <p>Food and beverage service</p>	<p>Canada & USA; Affluent mature singles and couples</p> <p>W. Can: (Accomplishers, Comfort Seekers, Real Relaxers)</p>	<p>Luxury resorts and small-scale high end lodges with spa facilities</p> <p>Golf facilities</p> <p>High quality, unique dining experiences; ethnic</p>
<p>Increasing ownership and use of RVs</p>	<p>Camping (short & long stay)</p> <p>Themed routes</p> <p>Experiential activities</p>	<p>Serviced Campgrounds in scenic locations</p>	<p>US & Can, 35-54 yrs, married with children</p> <p>Europe (Germany)</p> <p>AB: (all segments)</p>	<p>Serviced campgrounds in scenic locations, near services, near or part of themed circle routes</p>
<p>Interest in reconnecting with family and roots (heritage, culture) and in getting back to nature, natural environment; family reunions</p> <p>5% of Canadians participated in historical activities</p> <p>Increased popularity of rural and back-to-basics travel</p> <p>(see also Agri-tourism)</p>	<p>General touring, sightseeing</p> <p>Visiting historic sites, national & provincial parks, natural areas</p> <p>Agri-tourism activities.</p> <p>Adventure activities</p> <p>Genealogy, museums, archives</p>	<p>Roads and signage</p> <p>Staging areas for land & water based activities</p> <p>Additional development of historic sites</p> <p>Country vacation, B & B accommodation</p>	<p>W. Canada: families, urban residents (Accomplishers, Comfort Seekers, Real Relaxers)</p> <p>Affluent Canadian families, mature/ senior couples</p> <p>U.S. affluent mature/ senior couples, families</p>	<p>Ranch/farm vacations Guest Ranches</p> <p>Museums, historic site and resource development & upgrading; guided tours</p> <p>New development & refurbishing of Provincial Parks & Recreation facilities & services</p>

REDI Tourism SWOT Workshop Report

APPENDIX VIII: TOURISM TRENDS AND POTENTIAL PRODUCT / MARKET ASSESSMENT (Continued)

Trend	Associated Activities	Associated Facilities	Potential Market(s)	Potential Tourism Opportunities
<p>Agricultural Tourism (providing unique experiences for the regional market)</p> <p>Culinary tourism</p>	<p>Agri-tourism, including events, festivals, farm & ranch vacations, visit farmers markets, participate in harvest, U-pick</p> <p>Behind the scenes type experiences</p>	<p>Country vacation accommodation, such as farm/ranch vacations, B & Bs</p> <p>Markets, fair grounds</p>	<p>W. Can: Accomplishers, Comfort Seekers</p> <p>Pacific Northwest, Other Canada (young)</p>	<p>Ranch/farm vacations, trail rides, working vacations</p> <p>Farmers Markets, Rodeos, Fall fairs, Horticultural/ garden tours</p> <p>Locally produced dining</p>
<p>From escapism to enrichment – meaningful experience with focus on rejuvenation (authentic, interactive experiences, world heritage)</p> <p>Learn new skills (Hands on Learning, Experiential)</p> <p>Seek more personalization, customization of holiday experience, Niche markets</p> <p>Learn about another culture</p> <p>Appreciate the environment</p> <p>Wildlife viewing 2nd most common activity on trip (30.7% of Canadians & 26.9% of Americans)</p> <p>Experiences are part of a trip which may include VFR, resort vacations, touring</p>	<p>Experiential / learning</p> <p>Adventure tourism; range of experiences from soft to extreme (fishing, hiking, biking), guided tours & lessons for families & adults, linked to inns, B & Bs with hot tub, dining</p> <p>Visit local heritage/ cultural museums, interactive experiences, events, guided tours, arts & entertainment</p> <p>Traditional ethnic meals & entertainment</p> <p>Outdoor activities, hiking, back packing, biking, bird watching, butterfly watching, camping</p> <p>Tour activities re: agriculture, wildlife – behind the scenes & unique experiences</p>	<p>Hotels/ fixed roof accommodation with spas/hot tubs, etc</p> <p>Campgrounds, RV parks</p> <p>Farm/ranch vacations</p> <p>Equipment rentals, lessons</p> <p>Museums, cultural facilities, interpretive facilities with interactive, hands on experiences</p> <p>Ethnic food & beverage</p> <p>Multi-use trails, staging areas, equipment rentals, servicing</p>	<p>W. Can: Accomplishers, Comfort Seekers, Real Relaxers</p> <p>Canada: young singles, mainstream, Boomers</p> <p>Aging Boomers; adults traveling alone; grandparents/grandkids traveling together</p> <p>U.S.: young mainstream, mature families, Boomers</p> <p>Europe</p>	<p>Small scale fixed roof accommodation & serviced camping near activity areas</p> <p>Experiential activities, e.g., lessons, guided tours for wildlife viewing, recreation, fishing, hunting, ATV, agri-tours</p> <p>Equipment rental/service</p> <p>Upgrade highways/themed routes with pullouts, services</p> <p>Heritage based tours, events, activity; parks, museums & heritage site development & upgrading; extended hours, hands on activity programming, events, guided tours, activities</p> <p>Shuttle/bag transport service for hikers, bicyclers for multi-day/ long distance trail/river use (e.g., Peace R)</p>
<p>Aboriginal Tourism - interest in authentic cultural experiences, meet & interact, arts & crafts</p> <p>6.6% US visitors participated in Aboriginal experience</p>	<p>Historic & cultural interpretive programs / events; arts & crafts</p>	<p>Accommodation experiences</p> <p>Historic sites</p>	<p>Europe</p> <p>W. Canada – Accomplishers</p>	<p>Experiential activities, events</p> <p>Arts & crafts</p> <p>Guided activities</p>
<p>Fishing - 5th most common outdoor activity; 17.6% of Canadians & 14.7% of Americans fished on a holiday</p>	<p>Guided & fly in fishing</p>	<p>Fishing access area, campgrounds, lodges</p> <p>Boat & equipment rentals</p>	<p>Alberta – male, middle age</p>	<p>Equipment sales & rentals.</p> <p>Guided experiences.</p> <p>Accommodation.</p>

REDI Tourism SWOT Workshop Report

APPENDIX VIII: TOURISM TRENDS AND POTENTIAL PRODUCT / MARKET ASSESSMENT (Continued)

Trend	Associated Activities	Associated Facilities	Potential Market(s)	Potential Tourism Opportunities
Support for Ecotourism, Sustainable Tourism, Responsible Tourism, Geo Tourism (TIAA – 55.1M Americans are sustainable tourists)	Emphasize environment, conservation, sustainability Involve/contribute back to community	Green buildings, facilities	United States Europe, Australia Alberta: Young Urban Outdoor; Older Cost Conscious	Guided walking tours in protected areas; support facilities elsewhere Range of “green” services/ accommodation
Increasing interest in golf vacations 13.6% of Canadians & 9.2% of Americans played golf on a trip	Golfing, Outdoor activities Pampering, spas Shopping Fine dining, Nightlife (clubs)	Golf courses, club houses Food services, fine dining Fixed roof /luxury accommodation Spas, other amenities	AB: middle aged; Accomplisher, Comfort Seekers W. Canada/Canada US Affluent travelers Corporate/Business	Golf Courses, perhaps with accommodation Package golf, lessons, activities, accommodation as Stay & Play
Interest in Motorized Summer/Shoulder Season Recreation (OHV)	Events Camping	Trails Staging Areas Equipment rentals, repair	Alberta: 44 years, married with family	Staging areas, trails, services (rentals, lessons, guides), back country lodges
Interest in Snowmobiling 8.4% of Canadians & 5.5% of Americans used snowmobile or ATV on trip	Snowmobiling events Trail grooming, signs, maintenance	Trails & Staging areas Rentals and repairs. Food services Fixed roof accommodation, Campgrounds	Alberta: 44 yrs, \$68K annual household income, young couples, married with family Europe (Germany) British Columbia, Saskatchewan, Ontario	Staging areas, trail signs, groomed trails Backcountry lodges Services (rentals, lessons) Guided trips
Interest in Summer/Shoulder Non-Motorized Recreation (walking, hiking, cycling, trail riding, equestrian)	Guided/individual hiking & backpacking or day hikes in natural environment Short loop trails, in communities or parks Bicycle touring	Trails, staging areas & signs for hiking & walking / equestrian / bicycling Rental and repair services and facilities; equestrian facilities	W. Canada: (all segments) British Columbia, Saskatchewan, Ontario United States	Rentals, lessons, guided experiences Accommodation (fixed roof, campgrounds) Shuttle services to trail heads. Trails link communities Guide books
Interest in Adventure Travel, Extreme Sports Wilderness activities	Races: (running, cross-country, marathons); Cycling; Hang Gliding; Caving; Rock & Ice Climbing Water based: Fishing/fly fishing, canoeing, sailing	Trails & Staging areas Equipment rental, guides Accommodation & food services Marinas, boat launches	Alberta: Accomplishers Can & USA; young & mature singles, employed BC, SK, ON	Range of services (food, beverage, equipment rental, lessons, guides, rescue) & accommodation
Youth sport travel	Organized sports events, competitions, tournaments	Arenas, ball diamonds Low cost accommodation	Families with children	Organized sports events, tournaments Other supporting activities

**APPENDIX IX:
REDI COMMUNITY TOURISM ACTION PLAN (CTAP) SUMMARIES**

Community Tourism Action Plan (CTAP): ID 23 (now Mackenzie County)	
CTAP adopted Dec 10, 1991; Amended May 4, 1993	
Tourism Policy (1991) Tourism will be encouraged both within our municipality and within its surrounding area in such ways as to attract more tourists, increase their length of stay, increase the amount of money they spend, and ensure that increased tourism does not create adverse social, economic or environmental problems.	
Tourism Markets Identified in 1991	
<ul style="list-style-type: none"> • Business travelers (forestry, oil and gas personnel, agriculture, construction, trade shows, salespeople, professionals, government, entertainers) • Personal Business (farmers, townspeople, Natives) • Vacation (sports tournaments, campers, Winter Carnival, fairs/rodeos, hunters, fishermen, bingo players, cross-country skiing, boaters, snowmobilers, VFR) • Pass Through (truckers, commuters) 	
Tourism Assets and Concerns from 1991 CTAP (in order of priority)	
<p align="center">ID 23 Tourism Attractions – Assets</p> <ol style="list-style-type: none"> 1. Big game (large variety, plentiful, consumptive, non-consumptive, guiding) 2. Peace River (length, boating, fishing, water activities) 3. Fishing (catch and release, lodges) 4. La Crete Ferry on Peace River 5. Wilderness (big game, variety of wild berries, trees, rivers, lakes) 6. Pioneer Days (La Crete, Mennonite Community) 7. Bird life (variety, guiding) 8. Fort Vermilion (historical sites, time capsule) 9. Winter Carnival (Ft Vermilion, winter sporting events) 10. Farming (northern most agricultural land in Canada) 11. Buffalo Head Hills (lakes, viewpoints) 12. Clean air – pollutant free 13. North Vermilion Settlement (historic sites) 14. Caribou Mountain (lakes, different ecology) 15. Eleske Shrine (site of Annual Pilgrimage) 16. Northwest Territories adjacent 17. Lakes: Pelican Island (Wadlin), clean, quiet, fish 18. 24 Hour Daylight 19. La Crete Landing (site on Peace River Landing for Mennonite communities) 20. Northern Lights 21. Bird Sanctuaries 22. Watt Mountain (tower, viewpoints, lake, dam) 23. Wood Buffalo Park (proximity to) 	<p align="center">ID 23 Tourism Attractions – Concerns</p> <ol style="list-style-type: none"> 1. Fort Vermilion Historical sites require restoration 2. Insufficient development of Buffalo Head Hills 3. No pioneer village at La Crete 4. Not enough fish in Hutch, Sand Hills Lake 5. No downhill ski facilities 6. Not taking advantage of northern lights as attractions 7. No promotion of non-consumptive wildlife use 8. Beautification of hamlets 9. Poaching of big game; overhunting 10. No development of La Crete Landing as historic site 11. Hydrological map of Peace River required for navigation purposes 12. Archaeological research needed in several historical sites 13. Algae and weed control required to make Lake Tourangeau useable 14. Preservation of wilderness areas required for future tourism 15. Historic sites in North Vermilion Settlement need restoration 16. Increased tours of Experimental Farm at Fort Vermilion may increase tourism
<p align="center">ID 23 Tourism Services – Assets</p> <ol style="list-style-type: none"> 1. Service stations, grocery stores, restaurants, drug store, bank, laundromat, hardware, car wash, bulk stations in all major communities 2. Motels (FV, HL, LC, RL) 3. Guiding Services 4. Fishing Lodges (Bistcho, Margaret Lake) 5. Hunting Lodges (2) migratory game birds at La Crete 6. Daily air service: High Level, Rainbow Lake, Zama 7. Charter Air Services: (FV, HL, RL) 	<p align="center">ID 23 Tourism Services – Concerns</p> <ol style="list-style-type: none"> 1. Insufficient hours of operation of service stations and restaurants 2. Insufficient accommodation units (Fort Vermilion, La Crete, Zama) 3. Insufficient Bed and Breakfast facilities 4. Insufficient number of restaurants in t Vermilion, Zama 5. Lack gift /souvenir shops at Ft Vermilion, La Crete, Zama 6. No ATV, boat rentals 7. Insufficient fishing supplies outlets (Fort Vermilion)

REDI Tourism SWOT Workshop Report

<ol style="list-style-type: none"> 8. Farm equipment dealerships (Ft Vermilion, La Crete) 9. Liquor store (FV, HL, RL) 10. Daily Bus service: Greyhound La Crete bus service 11. Bed and Breakfast facilities (Fort Vermilion) 12. Transport Companies (HL, LC, RL) 13. Canoe Rental (Fort Vermilion, La Crete) 14. Auto Parts Store (High Level, La Crete) 15. Taxi (High Level, Fort Vermilion) 16. Post Offices (Buffalo Head Prairie, Fort Vermilion, High Level, La Crete, Rainbow Lake) 	<ol style="list-style-type: none"> 8. No car rental facilities 9. ATMs in major centres may increase spending 10. Lack of retail outlets in Fort Vermilion, Zama 11. No liquor store at La Crete and Zama 12. No taxi (La Crete, Zama)
<p style="text-align: center;">ID 23 Tourism Infrastructure – Assets</p> <ol style="list-style-type: none"> 1. Mackenzie Highway – main route to NWT 2. Campgrounds (public, private, numerous) 3. Arenas 4. Golf Course (9 holes at HL, LC, RL) 5. Hospitals (Fort Vermilion, High Level) 6. Public health service and medical clinic (La Crete, Rainbow Lake, Zama) 7. Ball diamonds 8. Highway 697 (partially paved, circle route through Fort Vermilion and La Crete) 9. Curling rinks 10. Churches 11. Parks / playgrounds 12. Airports (regular air service High Level and Rainbow Lake, paved strip Fort Vermilion and Zama) 13. Community halls / gyms 14. Highway 88 (partially paved route from Fort Vermilion to Slave Lake) 15. Security services (police, fire, ambulance) 16. Dumping stations 17. Electricity, water natural gas 18. Bowling alley (La Crete) 19. Boat Launch (Wadlin Lake, Hutch Lake, Machesis Lake, Peace River, Rainbow Lake, Lake Tourangeau) 20. Swimming pools (High Level, Zama) 	<p style="text-align: center;">ID 23 Tourism Infrastructure – Concerns</p> <ol style="list-style-type: none"> 1. Insufficient police coverage in ID 2. Highway 697 requires paving completion 3. No boat launches or docks on Peace River 4. Golf courses not completed at FV, LC, Zama) 5. No campsites at Tompkins Landing, Sand Hills, Chinchaga, Zama 6. Highway 88 needs paving 7. Lack of swimming pools at Fort Vermilion, La Crete 8. No full service campground 9. no road access / all weather road to Wood Buffalo NP 10. No east / west connector road to Fort Nelson 11. Airstrips need paving, Bistcho Lake, La Crete, Margaret Lake, Zama 12. Lack of Snowmobile, ATV trails 13. Lack of telephone repeater (mobile) 14. Lack of indoor arena / curing rink (Zama) 15. Inadequate ambulance coverage at Zama and LA Crete 16. No park / playground at Zama 17. No hospital at La Crete and Zama 18. Insufficient runway length at Fort Vermilion Airport 19. Not enough campsites at Hutch, Wadlin, Tourangeau 20. Lack of development in the Buffalo Head Hills area 21. Insufficient water access campsites on Peace River 22. Insufficient road access to Etna's (ATLAS) Landing 23. High Level golf course needs upgrading 24. Not enough security at campsites 25. No access to La Crete Landing 26. Arenas need upgrading 27. parks / playgrounds need upgrading 28. insufficient post office space at La Crete 29. No cable TV in Zama rural areas 30. No Post Office at Zama 31. Highways need shoulders 32. Ball diamonds need upgrading
<p style="text-align: center;">ID 23 CTAP Goals and Actions (1991) (Number in brackets reflects priority set by CTAP Committee)</p>	
<p>To Improve Tourism Attractions</p> <ul style="list-style-type: none"> • Take advantage of Northern Lights as tourist attraction (7) • Establish Pioneer Village and Museum – La Crete (8) • Develop Buffalo Head Hills (14) • Upgrade Fort Vermilion Historic Sites (15) • Increase fish stocks in Hutch Lake, Sand Hills Lake (16) • Develop downhill ski facilities (19) • Beautification in hamlets (28) • Take advantage of non-consumptive use of wildlife – big game, bird (33) 	

REDI Tourism SWOT Workshop Report

ID 23 CTAP Goals and Actions (1991) - Continued
<p>To improve Tourism Infrastructure</p> <ul style="list-style-type: none"> • Pave highways 697 and 88 (1) • Develop campsites at Tompkins Landing, Zama, Chinchaga, Sand Hills (2) • Develop dock and boat launches on Peace River (5) • Develop golf courses - Fort Vermilion, La Crete, Zama (6) • Establish swimming pools at La Crete, Fort Vermilion (9) • Increase police coverage of ID (22) • Establish East / West Road – Fort Nelson to Fort Smith (25) • Extend, pave and upgrade airstrips (26) • Establish snowmobile / ATV trails (29) • Increase mobile telephone coverage (30) • Construct arena / curling rink at Zama (31) Establish full service campground in ID (32)
<p>To improve Tourism Services</p> <ul style="list-style-type: none"> • Establish tourist related businesses: gift shop at Ft Vermilion, Zama, La Crete; ATV/Boat rentals; fishing supplies outlet; car rental (3) • Increase hours of operation of restaurants, service stations (10) • Increase accommodation units at Fort Vermilion, La Crete, Zama (11) • Increase Bed and Breakfast facilities in ID (18) • Increase restaurants I Fort Vermilion, Zama (23) <p>Added: To improve existing Historical sites and preserve artifacts and collectibles.</p>

Community Tourism Action Plan (CTAP): Town of High Level		
<p>CTAP adopted May 8, 1989; Amended Nov 16, 1990 and August 24, 1992</p>		
<p>Tourism Policy (1989)</p> <p>Tourism will be encouraged both within our town and within its surrounding area in such ways as to attract more tourists, increase their lengths of stay, increase the amount of money they spend, and ensure that increased tourism does not create adverse social, economic or environmental problems.</p>		
<p>Tourism Markets Identified in 1989 - ranked</p>		
<ol style="list-style-type: none"> 1. Visiting friends or relatives 2. Loggers 3. Work Crews 4. Shoppers 5. Farmers 6. Vacationers (target as #4) 7. Pass through residents 8. Truckers 9. Hunters 	<ol style="list-style-type: none"> 10. Campers (target as #3) 11. Festival / carnival participants 12. Medical service users 13. Sports teams / spectators 14. Consultants 15. Nature lovers (target as #1) 16. Conventioneers 17. Government workers 18. Traveling salespersons 19. Social service users 	<ol style="list-style-type: none"> 20. Fishermen 21. Natives 22. ATV/ snowmobile 4 x 4users 23. College students 24. Legal services users 25. Cultural activity participants 26. Bus tours (target as #2) 27. Entertainers 28. Job seekers
Tourism Assets and Concerns from 1989 CTAP (in order of priority)		
<p style="text-align: center;">High Level Tourism Attractions – Assets</p> <ol style="list-style-type: none"> 1. Good hunting and fishing 2. Hutch Lake 3. Central location between major centres 4. Painted murals and fire hydrants 5. High Level Trade show 6. Native Friendship Centre and Handicrafts 7. Trading Post 8. 200 Year Anniversary Celebration of Alexander Mackenzie Expedition 9. High Level golf course 10. Midnight Golf Tournament (and others) 	<p style="text-align: center;">High Level Tourism Attractions – Concerns</p> <ol style="list-style-type: none"> 1. Lack of developed cross-country ski & snowmobile trails 2. Lack of farmers market 3. Native Friendship Centre has limited space 4. Lack of museum 5. Lack of indoor swimming pool 6. Lack of scheduled events and conventions 7. Lack of fine art events (especially theatre) 8. Lack of Native cultural events 9. Lack of 18 hole golf course 10. Lack of ski hill 11. Lack of a consistent mural program 	

REDI Tourism SWOT Workshop Report

<ol style="list-style-type: none"> 11. Canfor Tours 12. Midnight Madness 13. Forest Farm 14. Watt Mountain 15. Ball Tournaments 16. Lion's Winter Carnival 17. Bingos 18. 1990 Homecoming 19. Proximity to Fort Vermillion 20. High level Rodeo 21. Curling Bonspiels 22. Hockey Tournaments 23. Homesteading 24. Indian Reserves 25. Eleske Shrine 26. Harris Buffalo Farm 27. Watson's Seed Farm 28. Proximity to the Peace River 29. Seed Cleaning Plant 30. Second Annual Christmas Celebration 31. Forestry Tower 	<ol style="list-style-type: none"> 12. Lack of country farm vacations 13. Lack of biking / hiking / horse trails 14. Lack of public park 15. Rodeo grounds in poor condition 16. Lack of farm tours (e.g., Mennonite farms) 17. Lack of interpretive centre 18. Need improved BMX facilities 19. Need dog-sled trails 20. Lack of development at Fort Vermillion 21. Lack of distinctive feature over highway 22. Lack of developed stock car track
<p style="text-align: center;">High Level Tourism Infrastructure – Assets</p> <ol style="list-style-type: none"> 1. Highways (Mackenzie Hwy 35, 53, 88) 2. Native Friendship Centre 3. High Level Recreational Arena (skating rink, swimming pool, curling rink) 4. Rodeo Grounds 5. Daily Air Service 6. Fairview College 7. Bus Service 8. Baseball diamonds 9. High Level Airport 10. RV Dump Station 11. Action North Complex 12. Motorsports Oval 13. Adult Education Centre, including Athletic Club 14. Point of interest 15. Library 16. Rural Community Hall 17. Community Centre 18. School Gyms 19. Courthouse 20. Schools 21. Railway 22. Minimum Security Prison 23. High Level Legion 	<p style="text-align: center;">High Level Tourism Infrastructure – Concerns</p> <ol style="list-style-type: none"> 1. Lack of clean washroom facilities 2. Direction t RV dump station is limited 3. Air flights far too expensive 4. Lack of boat launch at Hutch Lake 5. Lack of further development of Native Friendship Centre 6. Require re-routing of bus service on Grande Prairie – High Level route 7. Lack of air connections to the north, to Grande Prairie, to Edmonton & on to Calgary 8. Lack of bus shuttle to Hutch Lake 9. Lack of passenger service by rail
<p style="text-align: center;">High Level Tourism Services – Assets</p> <ol style="list-style-type: none"> 1. Grocery Stores, banks (3) 2. Gift / Jewelry Shop 3. Licensing services (vehicle, hunting, fishing) 4. Laundromats / Dry cleaners / Drug Store / Photo Shop / 24 hour convenience store / Liquor store 5. Restaurants (10 -12) 6. Air ambulance 7. Hotels / motels (7, totaling 225 rooms) 8. Hair dressers 	<p style="text-align: center;">High Level Tourism Services – Concerns</p> <ol style="list-style-type: none"> 1. Lack of 24 hour insta bank 2. Lack of Bed and Breakfast service 3. Lack of hostels 4. Lack of tours for recreational activities (snowmobiling, photography) 5. Lack of RV / ATV rentals 6. Lack of souvenir shop and craft shop/artists gallery 7. Lack of hunting and fishing lodges 8. Lack of Elder Hostel

REDI Tourism SWOT Workshop Report

<ol style="list-style-type: none"> 9. Travel agent 10. Gas stations (5) 11. Hospital / medical clinic 12. Sporting goods store / Hardware / lumber stores 13. Bulk gas stations 14. Video rental outlets 15. Post office 16. Clothing stores 17. Chiropractor / physiotherapist / speech therapist 18. Social services 19. Dental services 20. Flower shop 21. Mechanics for vehicles (24 hour service) 22. Safe Home network 23. Vehicle rental 24. Legal Services 25. Small engine repair 26. Optometrist services 	<ol style="list-style-type: none"> 9. Lack of YMCA style recreational exercise facility 10. Limited operating hours for banks 11. Limited campsite services 12. Lack of fishing lodges at Bistcho Lake
<p>High Level Goals and Objectives (1989) (in order of priority by CTAP Committee)</p>	
<ol style="list-style-type: none"> 1. To establish a full-time community tourism coordinator to oversee all aspects of tourism development 2. To develop a concerted tourism marketing plan for High Level. 3. To develop a unique town theme for High Level. 4. To encourage the expansion of, and new services at, the Native Friendship Centre location (includes ideas such as a museum and teepee village) 5. To encourage the construction of a location for retail and display of local arts and crafts and souvenirs. 6. To encourage and assist the Native Friendship Centre in establishing more Native cultural events as tourist attractions. 7. To develop and maintain a new trail system in the High Level area for cross-country skiing, ATV, snowmobiling, biking, hiking, and horseback riding 8. To promote northern wilderness experience as a vacation alternative. 9. To strongly encourage service businesses to use hospitality training programs on a regular basis. 10. To increase the availability and distribution of promotional materials for the High Level area. 11. To increase awareness of services available in High Level through effective advertising. 12. To encourage the promotion and scheduling of fine arts events from within, and outside of, High Level. 13. To encourage business and regulatory authority to promote and monitor cleaner washroom facilities. 14. To encourage development of tours and guided services for various recreational activities. 15. To encourage at least one bank to install a 24 hour ATM. 16. To encourage the town to improve signage for services and attractions in High Level area. 17. To ensure that all service industry employees are informed and educated on local tourist services and attractions. 18. To establish a central public market area and event for High Level. 19. To encourage the ATV/RV businesses to provide a rental service for tourists 20. To pursue development of additional bus services between High Level, Rainbow Lake, Assumption and Grande Prairie. 21. To pursue avenues of reducing flight costs, increasing connections and improving schedules for airline service. 22. To investigate the feasibility of a new "Water Park complex as a major tourist attraction in High Level 23. TO encourage development of and provide information on Bed and Breakfast services in High Level 24. To investigate the development of accommodations for low budget travelers. <p>Added: To encourage and support the expansion of the existing golf course and its related facilities.</p> <p>Added: To encourage upgrading of the existing RV dump station.</p>	

REDI Tourism SWOT Workshop Report

Community Tourism Action Plan (CTAP): Town of Rainbow Lake	
CTAP adopted November 22, 1992	
Tourism Markets Identified in 1992	
<ul style="list-style-type: none"> • Family and friends • Work crews • Travelers (camping, hunting, fishing) • Sports Teams • Job seekers (oil and gas) • Natives (business, recreation) • Business (sales, engineers, consultants) • Medical service users 	
Tourism Assets and Concerns from 1992 CTAP (in order of priority)	
<p style="text-align: center;">Rainbow Lake Tourism Attractions – Assets</p> <ol style="list-style-type: none"> 1. Rainbow Lake and campgrounds (good fishing) 2. Golf course and club house 3. Fish Pond and Picnic area 4. Annual curling bonspiels 5. Annual hockey and ball tournaments 6. Hunting 7. Black Gold Days (winter) 8. Western Days (spring) 	<p style="text-align: center;">Rainbow Lake Tourism Attractions – Concerns</p> <ol style="list-style-type: none"> 1. Lake area is undeveloped 2. Golf course requires further upgrading 3. Nature trail has been removed by golf course expansion
<p style="text-align: center;">Rainbow Lake Tourism Infrastructure – Assets</p> <ol style="list-style-type: none"> 1. Curling Rink 2. Ball Diamonds 3. Arena and Recreation Complex 4. Airport Service 5. RV Dump Station 	<p style="text-align: center;">Rainbow Lake Tourism Infrastructure – Concerns</p> <ol style="list-style-type: none"> 1. No convenient highway link with BC 2. Curling rink foundation is becoming unstable 3. Lack of dressing rooms in the Skating area and Lobby needs renovation
<p style="text-align: center;">Rainbow Lake Tourism Services – Assets</p> <ol style="list-style-type: none"> 1. Sufficient service stations 2. One dining lounge and 2 restaurants 3. 2 hotels 4. Medical services 5. Drug store 6. Grocery store and 2 convenience stores 7. Hardware store 8. Liquor store 9. Laundromat 10. Freight Depot 11. Post Office 12. Public library 	<p style="text-align: center;">Rainbow Lake Tourism Services – Concerns</p> <ol style="list-style-type: none"> 1. Lack of service campsites in town 2. Banking facility does not provide optimal service 3. Souvenir availability is limited 4. Lack of available tourist / town history information 5. No location map at town limits
Rainbow Lake Tourism Goals and Objectives (1992)	
<p>To improve tourism attractions:</p> <ul style="list-style-type: none"> • To provide a fully modern and competitive golf course (3) • To develop lake area (4) • To develop nature trails (6) 	<p>To improve Tourism Infrastructure:</p> <ul style="list-style-type: none"> • To encourage construction of Ft Nelson / Rainbow Lake Highway (1) • To rebuild curling rink (7) • To upgrade skating rink (8)
<p>To Improve Tourism Services:</p> <ul style="list-style-type: none"> • To provide serviced campsites in town. • To improve souvenir availability • To make local tourist information available • To encourage better banking services 	<p>To improve tourism promotion</p> <ul style="list-style-type: none"> • To provide a location map at town limits

REDI Tourism SWOT Workshop Report

Community Tourism Action Plan (CTAP): Paddle Prairie Métis Settlement	
CTAP adopted July 22, 1992; Updated June 2, 1993	
Tourism Markets Identified in 1992	
<ul style="list-style-type: none"> • Business (government, sales, oil field personnel, contractors, utility workers, professionals, other native peoples) • Personal / business (farmers, loggers, ranchers) • Vacation (campers, sports, cultural event participants, sightseers, canoers, religious, hunters, VFR, pass through) • Potential new (trail rides, tour groups, hikers) 	
Tourism Assets and Concerns from 1992 CTAP (Ranking in order of priority)	
<p style="text-align: center;">Paddle Prairie Attractions – Assets</p> <ol style="list-style-type: none"> 1. Annual rodeo 2. Athletic competition 3. Wildlife 4. Big game hunting 5. Tompkins Landing Ferry 6. Cemetery 7. Tompkins Landing Prov Park 8. Scenic countryside 9. Métis culture 10. Peace, Chinchaga, Keg Rivers 11. Wilderness 12. Abundant water fowl 13. Annual winter carnival 14. School functions 15. Mobile industrial training centre functions 16. Carcajou Flats historical sites 17. Churches 	<p style="text-align: center;">Paddle Prairie Tourism Attractions – Concerns</p> <ol style="list-style-type: none"> 1. Lack of fund raising/organizational activities 2. Shortage of funding for projects 3. No community theme 4. Lack of beautification of hamlet – landscaping 5. No museum 6. No wildlife park / zoo 7. No recognition or reference to 3 adjacent rivers 8. lack of community involvement to organize
<p style="text-align: center;">Paddle Prairie Tourism Infrastructure - Assets</p> <ol style="list-style-type: none"> 1. Rodeo grounds 2. Outdoor skating rink 3. Mackenzie Highway 4. Good access to all rivers 5. Tompkins Landing Ferry 6. Campgrounds 7. Public washrooms 8. Public litter stop / roadside turnouts 9. Good water availability 10. All utilities / Payphones 11. Good road system throughout settlement 12. Meeting facilities 13. Paddle Prairie school gymnasium 14. Tennis courts 15. Post office 	<p style="text-align: center;">Paddle Prairie Tourism Infrastructure – Concerns</p> <ol style="list-style-type: none"> 1. No indoor arena 2. Dance hall inadequate and poorly located 3. Lack essential services at campground 4. No RV dump station 5. Inadequate public washrooms at rodeo grounds 6. No golfing facilities 7. No hiking trails 8. No swimming facilities 9. No boat launch at river landing
<p style="text-align: center;">Paddle Prairie Tourism Services - Assets</p> <ol style="list-style-type: none"> 1. Convenience Store / gas bar 2. Campsites 3. Mechanical services available 4. Concession stands at local events 	<p style="text-align: center;">Paddle Prairie Tourism Services – Concerns</p> <ol style="list-style-type: none"> 1. Lack of recreation facilities 2. No entertainment facilities – youth/adult 3. Insufficient supplies at local convenience store 4. No bingo facilities / equipment 5. Lack restaurant, eating facilities, accommodations 6. No RV sites / settlement operated campground 7. No hunting / fishing supplies 8. No sporting goods supplies 9. No licensed lounge facilities 10. No arts and craft souvenir shop 11. No golfing range facilities 12. No small engine repair services

REDI Tourism SWOT Workshop Report

Paddle Prairie Tourism Goals and Objectives (1992)	
<p>To improve tourism attractions.</p> <ul style="list-style-type: none"> • To develop a community theme (5) • To organize a designated "Settlement Proclamation Week: site (6) • To improve hamlet area to improve community image (7) • To develop a Métis community history museum (23) 	<p>To improve tourism promotion:</p> <ul style="list-style-type: none"> • To develop and erect proper signage in order to market services provided locally (11) • To develop historical sites on the settlement (15) • To establish Tourism Information Centre. (16)
<p>To improve tourism infrastructure:</p> <ul style="list-style-type: none"> • To establish a new community hall (2) • To establish a community bingo facility (3) • To establish adequate washroom facilities at rodeo grounds (14) • To establish a boat launch at Peace River at the Tompkins Landing (21) • To establish designated hiking trails on settlement (24) 	<p>To improve tourism services:</p> <ul style="list-style-type: none"> • To establish a community recreation complex (1) • To improve the services available at the store to include hunting and sporting goods (12) • To establish settlement owned campground /RV station (13) • To establish a cultural arts and crafts shop (17) • To develop a golfing range (18) • To develop forms of entertainment (19) • To establish a restaurant / lounge (20) • To develop accommodation facilities (22)

Community Tourism Action Plan (CTAP): Tallcree Band	
<p>CTAP adopted June 25, 1991</p>	
<p>Tourism Policy: Tourism will be encouraged both within the Tallcree and surrounding area in such ways as to attract more Tourists, increase their lengths of stay, increase the amount of money they spend and ensure that increased tourism does not created adverse social, economic or environmental problems.</p>	
<p>Tourism Markets (1991)</p> <ul style="list-style-type: none"> • Business (oil and gas representatives, utility workers, government officials, suppliers, contractors, professionals, Tribal Councils and Bands, car wreckers) • Vacationers (hunters, Treaty Days participants, fishermen, sports participants, campers, winter carnival participants, canoers and boaters, sightseers, berry pickers, bus tours, skiers, VFR) • Pass through (truckers, loggers, commuters) 	
Tallcree Band Tourism Assets and Concerns from 1991 CTAP (Ranking in order of priority)	
<p>Tallcree Band Tourism Attractions – Assets</p> <ol style="list-style-type: none"> 1. Wilderness 2. Wildlife and game 3. Native Culture 4. Good fishing 5. Wabasca River 6. Sports Tournament 7. Fort Vermilion 8. Treaty Days 9. Wadlin Lake 10. Winter Carnival 11. Tallcree Crossing 12. Wildlife sanctuary / pelican nesting ground 13. Berries 14. Eleske Shrine 	<p>Tallcree Band Tourism Attractions – Concerns</p> <ol style="list-style-type: none"> 1. No major tourist attraction at Tallcree 2. Lack of cooperation with Fort Vermilion 3. Cultural event no very well organized 4. Arts and Crafts not being developed 5. Not enough sports tournaments 6. Fish and Wildlife wardens not enforcing regulations 7. Fish stocks depleting

REDI Tourism SWOT Workshop Report

Tall Cree Band Tourism Assets and Concerns from 1991 CTAP (Continued)	
<p style="text-align: center;">Tallcree Band Tourism Infrastructure – Assets</p> <ol style="list-style-type: none"> 1. Highway 88 2. Utilities 3. Pier / boat launch 4. Fire Hall 5. Secondary roads 6. Wadlin Lake campsite 7. School ball diamond 8. Community Hall 9. Tallcree Crossing Campsite 	<p style="text-align: center;">Tallcree Band Tourism Infrastructure – Concerns</p> <ol style="list-style-type: none"> 1. Highway not paved 2. Campsite at Wadlin Lake not Native run 3. No cultural facilities 4. Secondary Road poorly maintained 5. Sporting facilities are inadequate 6. No arena / skating rink 7. No public washrooms 8. Boat launch at South Tallcree inadequate 9. Campground inadequate 10. No public telephone 11. No post office 12. No dump station
<p style="text-align: center;">Tallcree Band Tourism Services – Assets</p> <ol style="list-style-type: none"> 1. Tallcree Service Station 2. Small confectionary 	<p style="text-align: center;">Tallcree Band Tourism Services – Concerns</p> <ol style="list-style-type: none"> 1. No guide services 2. Service station not fully operational 3. No entertainment 4. No grocery store 5. Confectionary store not fully developed 6. No food services / restaurants 7. No hunting / fishing supplies store 8. Lack of souvenirs / outlets 9. Lack of arts and crafts outlets 10. No accommodations
Tallcree Tourism Goals and Objectives (1991)	
<p>To Improve Tourism attractions:</p> <ul style="list-style-type: none"> • To develop the supply of arts and crafts (5) • To develop and organize cultural events (9) • To develop more sports events (10) • To develop a major tourism attraction (11) • To develop cooperation with Fort Vermilion (16) 	<p>To Improve Tourism Infrastructure:</p> <ul style="list-style-type: none"> • To pave Highway 88 (2) • To develop cultural facilities (3) • To upgrade and expand sporting facilities (7) • To encourage native involvement in Wadlin Lake development (12) • To upgrade and maintain secondary roads (20)
<p>To improve Tourism Services:</p> <ul style="list-style-type: none"> • To encourage development of new businesses (1) • To encourage fully developed operation of existing businesses (8) 	

REDI Tourism SWOT Workshop Report

Community Tourism Action Plan (CTAP): Beaver First Nation	
CTAP adopted June 23, 1993	
Tourism Markets Identified in 1993	
<ul style="list-style-type: none"> • Business (traveling salesmen, government, famers/loggers, trainers) • Personal Business (farmers, natives, VFR) • Vacation (campers, hunters, nature lovers, fishermen, culture participants/spectators, recreation participants/spectators) 	
Tourism Assets and Concerns from 1993 CTAP (Ranking in order of priority)	
Beaver First Nation Tourism Attractions – Assets <ul style="list-style-type: none"> • Eleske Shrine • Annual Pilgrimage • Indian Culture and History • Cultural Events (tea dances) • Native handicrafts • Rocky Lane Rodeo 	Beaver First Nation Tourism Attractions – Concerns <ul style="list-style-type: none"> • Need expansion and beautification of shrine site • Need improved interpretive signage at shrine site • Need some kind of organized structure to allow interactions with community members (re: historical / cultural education)
Beaver First Nation Tourism Infrastructure - Assets <ul style="list-style-type: none"> • Highways 35, 58 • Baseball diamond 	Beaver First Nation Tourism Infrastructure – Concerns <ul style="list-style-type: none"> • Lack of facilities to host cultural and recreational events • Ball diamond needs upgrading and expansion • Lack of outlet for information and crafts • Lack of camping facilities (including safe water and sanitation facilities, RV dump station) • Lack of boat launch • Lack of alternatives for recreation and other activity
	Beaver First Nation Tourism Services - Concerns <ul style="list-style-type: none"> • Lack of food, gas and coin laundry facilities on Child Lake Reserve • Lack of organized packages as vacation alternatives • Lack of outlet for souvenirs and crafts • Lack of campsite services.
Beaver First Nation Tourism Goals and Objectives 1993 (ranked in order of priority)	
<ol style="list-style-type: none"> 1. To expand and beautify Eleske Shrine site. 2. To establish campsite facilities adjacent to shrine site. 3. To develop improved signage for the Eleske Shrine at Highway 58 (as pull out point of interest stop), from the highway (directional), and at the shrine (interpretive) 4. To establish an outlet combining information services, souvenir and craft shop, and interpretive centre 5. TO develop horseshoe pits, nature trails, boat launch, playground as additional amenities at campground 6. To establish campsite facilities at the Forks", a popular fishing spot at the confluence of the Boyer and Ponton Rivers 7. To develop baseball diamonds 8. To encourage establishment of a confectionary / gas/ coin laundry business on Child Lake Reserve 9. To explore the possibility of developing cultural experience types of vacation packages (story telling, wagon train excursions, displays / demonstrations of moose hide tanning and other craft work) 10. To develop promotional material 11. To develop souvenir items for sale through a local outlet 12. To increase awareness among community members of the importance of tourism as a tool for economic and community development. 	

REDI Tourism SWOT Workshop Report

Community Tourism Action Plan (CTAP): Little Red River Cree Band	
CTAP adopted February 24, 1989	
Tourism Assets and Concerns from 1989 CTAP (Ranking in order of priority)	
<p>Little Red River Cree Band Tourism Attractions – Assets</p> <ol style="list-style-type: none"> 1. Virgin territory 2. Good fishing 3. Indian people and their lifestyle 4. Wildlife 5. Fort Vermilion Rapids and Little Red River Historical Site 6. Traditional celebrations (Pilgrimage to Little Red River Post) 	<p>Little Red River Cree Tourism Attractions – Concerns</p> <ol style="list-style-type: none"> 1. Too many tourists might adversely affect traditional lifestyle 2. Destruction of the natural landscape 3. Effect of the proposed pulp mills on the environment 4. Overfishing / hunting 5. Garbage and other Pollution 6. Poachers
<p>Little Red River Cree Tourism Infrastructure – Assets</p> <ol style="list-style-type: none"> 1. Airstrips 2. Air Service 3. Road from Jean D’or to Fort Vermilion 4. Electricity 5. Water reservoirs 6. CBC transmitter 7. Nursing stations (3) 8. Schools 9. Band / Tribal offices 	<p>Little Red River Cree Tourism Infrastructure – Concerns</p> <ol style="list-style-type: none"> 1. Lack of funds to purchase docks, portable accommodation and plumbing installations 2. Paved and lighted air strips
<p>Little Red River Cree Tourism Hospitality – Assets</p> <ol style="list-style-type: none"> 1. Friendly, hospitable people 2. Elders with knowledge of the traditional way of life 	<p>Little Red River Cree Tourism Services – Assets</p> <ol style="list-style-type: none"> 1. Fishing Lodges 2. Hudson Bay Stores 3. Retail services (convenience stores / gas) 4. Laundromats
	<p>Little Red River Cree Tourism Services – Concerns</p> <ol style="list-style-type: none"> 1. We do not own or operate any of the existing fishing lodges in the region 2. No restaurants 3. No accommodation (hotels / motels)
Little Red River Cree Tourism Goals and Objectives 1989 (list in order of priority)	
<ol style="list-style-type: none"> 1. To ensure retention of traditional lifestyle. 2. To protect the natural environment from the effect of increased tourism trade. 3. To acquire adequate fishing lodge facilities in the Caribou Mountain Area 4. To acquire funds to improve / build lodge facilities 5. To protect the environment against pollution outside / inside the region. 6. To improve air service facilities. 7. To improve road access to Jean D’Or Prairie and Garden River communities. 8. To discourage tourism operations that negatively impact on the environment. 9. To develop and train lake hosts and loge staff. 10. To acquire a restaurant facility in the communities. 11. To obtain funds to promote the regions. 12. to develop expertise / capability to specifically / distinctly market the region 13. To obtain funds to promote the regions. 	