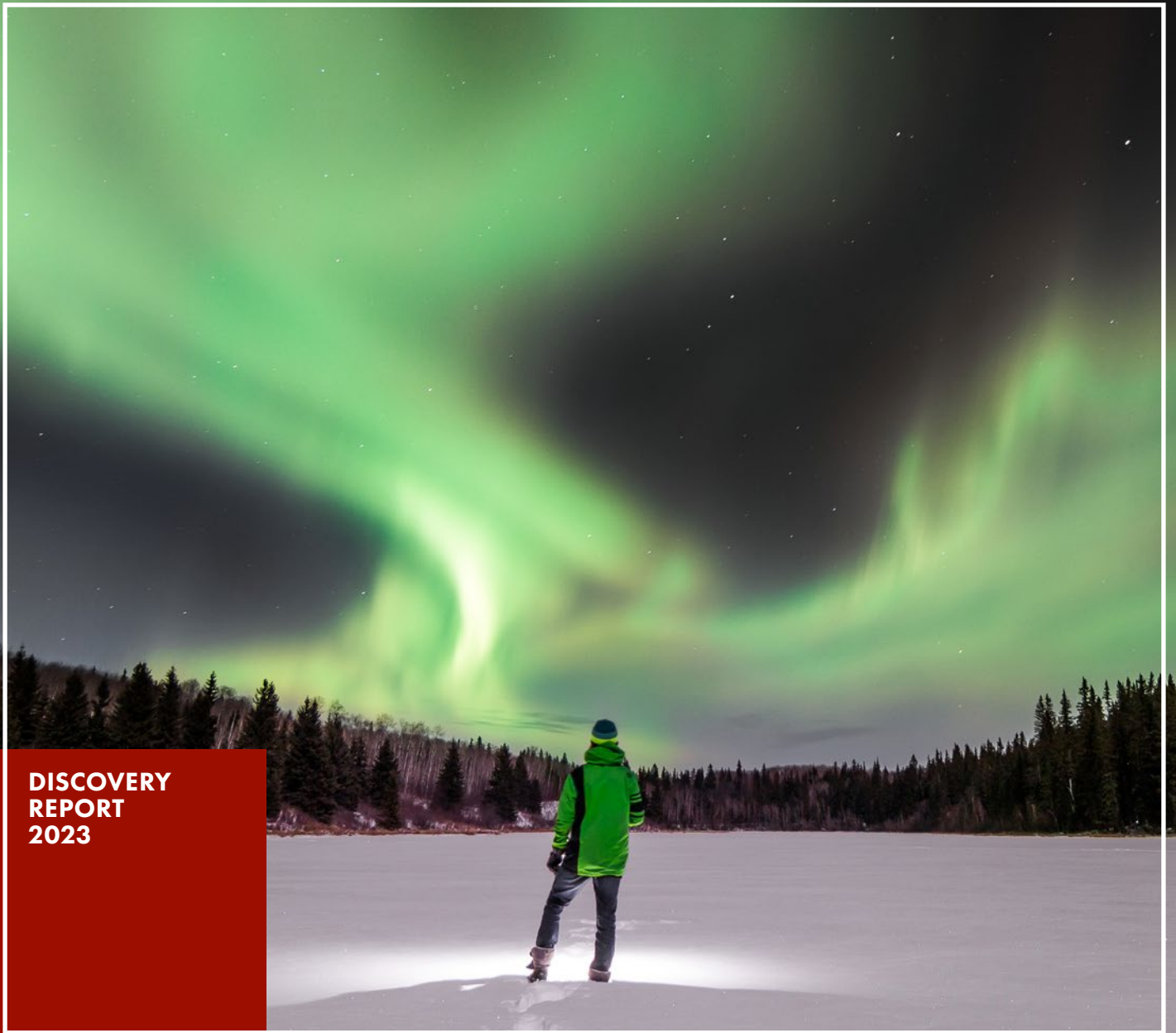


TOURISM DEVELOPMENT ZONE

Northeast Lakelands



**DISCOVERY
REPORT
2023**

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Front cover:
Cold Lake
Brandon Born @brandonborn

Métis Crossing, Smoky Lake

PREFACE

The Northeast Lakelands Tourism Development Zone (TDZ) is geographically vast, encompassing endless rolling prairies and constellations of small and large lakes with their shores, beaches and marshes. Though the zone is currently underdeveloped, it offers significant opportunities to build up a thriving tourism industry.

In order to reach its full potential as a destination, the Northeast Lakelands TDZ requires tourism partners, communities, economic organizations, investors and other stakeholders throughout the zone to collaborate to expand visitor experiences, prioritize tourism as an economic opportunity, and address the challenges currently facing the tourism sector in the zone.

This Destination Development Discovery Report for the Northeast Lakelands TDZ:

- Highlights those tourism assets most likely to attract high-value visitors from across Canada and around the world
- Provides insight into the area's natural, cultural, and economic environments
- Identifies specific challenges facing this TDZ and proposes initiatives to address them
- Demonstrates that it will be key to the development of this zone to improve road connectivity between current tourism product clusters and larger service centres so that visitors can move through the zone's vast area and be motivated to try new tourism experiences, resulting in longer stays

It is important to note that this Discovery Report is a living document and will continue to evolve to reflect ongoing work, including Indigenous engagement that is currently underway.

This Discovery Report informs and identifies specific actions Travel Alberta, the Government of Alberta and communities within the Northeast Lakelands TDZ should take to support the design of a comprehensive Destination Development Plan. This report aligns the tourism development ambitions of local stakeholders with the province's goal to double tourism revenue by 2035.



Journey North Cider Co., Bonnyville
SkiNorthAB / Paul Lavoie

03 INTRODUCTION



Elk Island Retreat, Fort Saskatchewan

LAND ACKNOWLEDGMENT

In the spirit of respect, reciprocity and truth, we honour and acknowledge the traditional territories of the many First Nations, Métis, and Inuit in Alberta. We value these sacred gathering places and aim to inspire others to appreciate and embrace stewardship of the land as they explore our great province.

The Northeast Lakelands TDZ lies at the intersection of a number of historical and present-day lands that Indigenous Peoples have cared for and lived on for generations. We honour the traditional lands of the Treaty 6, 8 and 10 signatories, including the Cree, Dene, Blackfoot, Saulteaux, and Nakota Sioux homelands. We also acknowledge members of the Athabasca Métis District, St. Albert Métis District, St. Paul-Cold Lake Métis District, and Lac La Biche Métis District within the homeland of Métis and the Otipemisiwak Métis Government, as well as Indigenous Peoples living in urban areas throughout the Northeast Lakelands. We appreciate that modern borders do not align with traditional land use, and we honour the neighbouring Indigenous communities who have travelled and inhabited this land throughout history.



Treaty 6

APPRECIATION

Travel Alberta would like to thank all those who participated in the creation of this Discovery Report.

Please note, Indigenous engagement is currently underway.

- **Eiblis Doherty**, tourism development officer, Strathcona County
- **Esther Quimbao**, general manager, Planning & Community Services, Municipal District of Bonnyville
- **Heather Stromquist**, manager, Economic Development & Tourism, Lac La Biche County
- **John Ritchie**, owner, Hideaway Adventures
- **Kyle Schole**, planning technician, County of Smoky Lake
- **Leon Hunter**, director of business development, Métis Crossing
- **Linda Sallstrom**, economic development officer, St. Paul / Elk Point Economic Development Alliance
- **Marianne Janke**, executive director, Travel Lakeland/Iron Horse Trail
- **Marylee Prior**, economic development officer, Town of Vermilion
- **Michelle Wright**, director, Visitor Experience, Métis Crossing
- **Scott Kovach**, economic development specialist, Municipal District of Bonnyville
- **Shane Olson**, manager, Economic Development and Tourism, Strathcona County
- **Suzanne Prevost**, directrice du développement rural et entrepreneurial, Conseil de Développement Économique de l'Alberta (CDÉA)

COMMITMENT TO SUSTAINABILITY & REGENERATIVE TOURISM

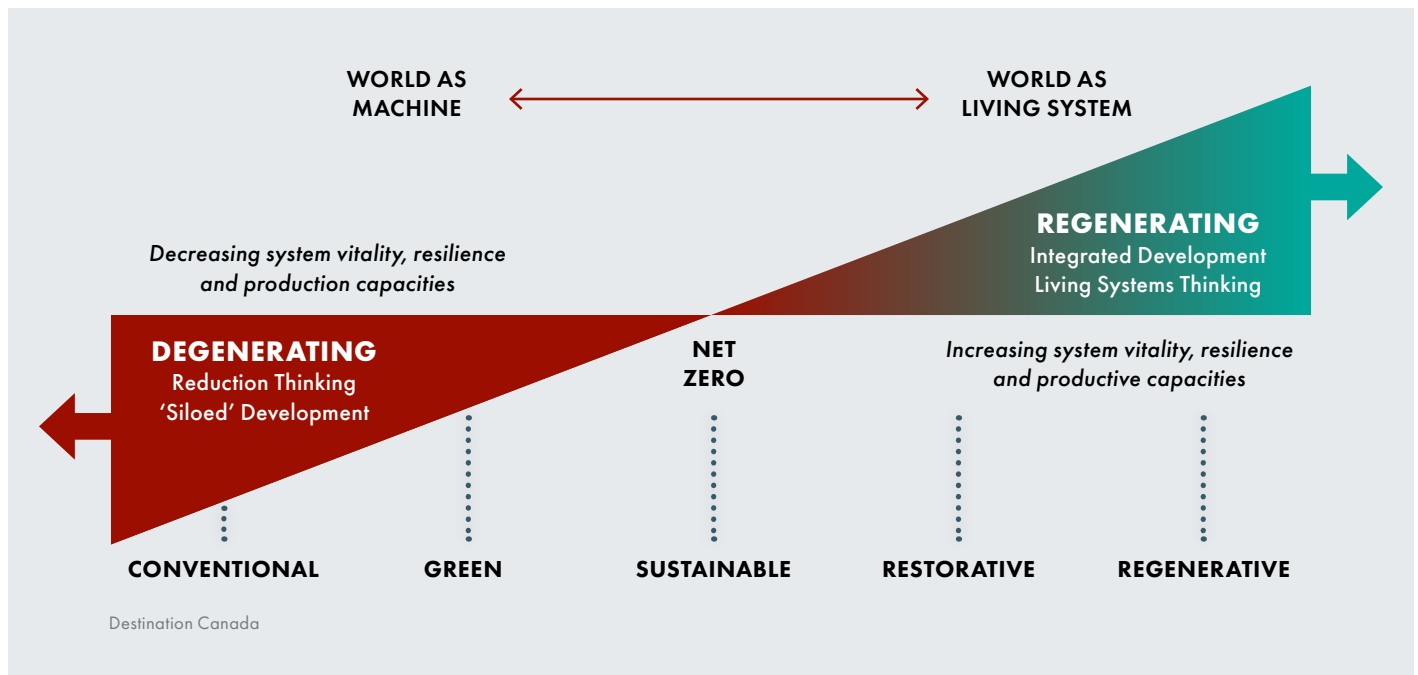
Tourism is a key economic sector in Alberta with strong potential to diversify the economy, create jobs, grow Indigenous tourism businesses, bring the “taste of place” to our guests’ tables and build vibrant communities. It also allows us to preserve and share culture and history, maintain or enhance the environment and foster innovation.

However, as outlined in Destination Canada’s report titled, “A Regenerative Approach to Tourism In Canada”, more and more communities are rejecting uncontrolled tourism development. The rising sentiment is that current approaches:

- Are too often extractive and degenerative
- Reduce quality of life for residents
- Damage ecosystem health
- Diminish local culture and community in the interest of efficiency and scale

An alternative approach is gradually emerging — and in many ways re-emerging. It recognizes the world not as a machine but as a living ecosystem, with humans playing an integral part. And it is from this worldview that the concept of regeneration arises.

Spectrum of Worldviews & Strategies



Kikino Silver Birch Resort, Lac La Biche

TOURISM DEVELOPMENT ZONES

Collaborating with Communities

Pre-pandemic, nearly 60 per cent of visitation and 75 per cent of tourism expenditures occurred in the mature tourism destinations of Banff, Lake Louise, Canmore, Jasper, Calgary and Edmonton. By developing additional “emerging” destinations, we expand opportunities for Albertans to explore their own backyard, creating more space for international visitation in legacy destinations while reducing Alberta’s traveller deficit.

To support tourism development in these emerging destinations, Travel Alberta identified 10 Tourism Development Zones (TDZs) across the province with a high potential for tourism growth over the next 10 years. With successful and sustainable development, these destinations will have the ability to make a meaningful contribution to Alberta’s visitor economy.

In partnership with communities and stakeholders, Travel Alberta has co-developed a series of TDZ Discovery Reports. These Discovery Reports will inform and guide our future Destination Development Plans that include medium- and long-term strategies to contribute to the growth of Alberta’s visitor economy across many high-potential regions of the province.

Together with industry, Indigenous Peoples, government and residents across each TDZ, we strive to:

- Grow & diversify the economy
- Support jobs
- Preserve cultures
- Foster innovation
- Conserve the environment
- Improve resident quality of life



DESTINATION DEVELOPMENT PLAN

A Destination Development Plan (DDP) is a 10-year strategic roadmap to optimize and future-proof the potential of a zone's visitor economy. The realized benefits of a comprehensive DDP include: increased revenues coming into communities from visitors; support for the growth of small-to-medium size businesses; the alignment of public, private and community sectors; more opportunities for employment; and enhanced pride of place and quality of life for Albertans.

In this first phase, we took a data-driven and community-led approach to better understand the state of the local visitor economy in each TDZ and begin to identify the inter-related elements of a comprehensive DDP. We assessed resident sentiment and the commitment of stakeholders and municipal governments to determine whether or not local leadership was present and committed to diversifying their zone's economy through tourism. In many TDZs, it was evident that multiple initiatives (and even past studies) have assessed the tourism potential across counties and communities. We speculate

that these previous assessments have not resulted in optimized local tourism sectors because — as reflected in the DDP framework — comprehensive optimization requires attention, consideration and investment of resources across more elements than most organizations have the capacity or resources to coordinate.

As this report demonstrates, we have identified both opportunities and barriers across many of these elements. Going forward, there is much work to be shared amongst stakeholders in each TDZ, using the DDP as a framework. Travel Alberta is committed to collaborating with local and provincial partners to help drive the development and execution of a DDP in those communities that are equally committed to building up Alberta's visitor economy.

Now that this Discovery Report has been released, it is key that Travel Alberta, the Government of Alberta and the many stakeholders within the Northeast Lakelands TDZ work together to address the relevant inter-related elements:



(Adapted from Failte Ireland)

METHODOLOGY

Travel Alberta partnered with consulting firm FLOOR13, the IBI Group, Jennifer Nichol Consulting, EDG Planning & Design and Grant Thornton to collect the data and reach the conclusions summarized in this report.

A two-part methodology allowed Travel Alberta and the consulting team to become acquainted with regional stakeholders and communities, determine their vision for the future growth of the local visitor economy and identify key action steps to support a path forward in the design of a DDP for the Northeast Lakelands TDZ.

In the **“discovery and destination profiling”** phase, Travel Alberta worked with the consulting team to host a virtual kick-off presentation, access research material, build a steering committee (including local operators, government representatives and DMO), and establish a framework for engagement.

In the **“exploring, imagining and visioning”** phase, the consulting team met with the steering committee to determine opportunities, challenges, goals, proposed investment projects and an action plan; facilitated planning sessions; and conducted in-depth community assessments within the Northeast Lakelands TDZ. These assessments included visits to over 17 sites, meetings with over 32 industry partners and local government members, and over 30 one-on-one interviews with business operators, community members and other stakeholders.



Wicked Watersports, Cold Lake

04 STAKEHOLDER ENGAGEMENT



Sir Winston Churchill Provincial Park

118

Stakeholders

20

Businesses

15

Communities

WHAT WE HEARD

In order to gain a comprehensive understanding of the Northeast Lakelands TDZ, Travel Alberta and the consulting team made a concerted effort to engage with the area's communities. As a result of this engagement, the team learned that:

- The area has a rich culture and history that visitors should further explore. Products, including Métis Crossing, Victoria Settlement and the Ukrainian Cultural Village, all contribute to telling the zone's unique stories.
- Better collaboration between all communities is essential to growing tourism in this zone. Effective collaboration might look like compiling a multi-day, multi-community events calendar to encourage visitors to the zone to stay and play longer.
- Product and experience offerings need to be expanded into the shoulder seasons. Business owners, tourism organizations and investors should focus on developing more winter overnight experiences, such as snowshoeing and viewing northern lights from the comfort of star-gazing domes (as an example).
- Improving transportation (to and within the zone) and broadband access (throughout the zone) are community priorities that will support tourism growth.
- The lakes are an essential feature of this zone, and there is potential to capitalize on water-based recreation such as seasonal fishing, kayak fishing and canoeing the circuit in Lac la Biche.
- Many entrepreneurs have challenges navigating municipal, provincial and federal policies and processes governing development. The growth of the tourism sector will require more support from and collaboration among all orders of government.
- In some instances, municipal, provincial and federal policies are limiting tourism development opportunities, specifically those related to recreational water access.

Comprehensive Indigenous community engagement is currently underway and will provide further insights and observations.



Victoria Settlement, Smoky Lake

05 INDIGENOUS ENGAGEMENT



Métis Crossing, Smoky Lake
Indigenous Tourism Alberta / ROAM Creative

Across generations, Indigenous Peoples have warmly embraced their neighbors on ancestral lands, fostering deep, mutually enriching bonds through the customs and protocols of treaty-making and visitation. This enduring approach is steeped in the ancient traditions of hospitality and attentive listening.

In active relationship with Indigenous Tourism Alberta, Travel Alberta has enlisted our teams to engage and share space with First Nations, Councils, Settlements, Coops, Confederacies, and community leaders and community members to nurture mutual understanding, trust, and respect. Our engagement protocols and approaches are deeply anchored in the wisdom of our ancestors and knowledge shared by and from the communities we work with and for. Throughout our outreach efforts, we have and will continue to invite in and convene Indigenous leaders and community members with *kisêwâtisiwin* — kindness.

We look forward to weaving the insight we gain into this Discovery Report upon completion.

We hold the belief that Travel Alberta is dedicated to continuous engagement, active listening, and taking effective measures to nurture and grow these relationships, fully comprehend shared aspirations, and further strengthen trust. Together with Travel Alberta and Indigenous Tourism Alberta, we acknowledge and extend our gratitude to the Elders, Knowledge Carriers, Youth, and leadership of these communities and to all our participants and relatives in this transformative work.

***kahkiyaw niwâhkômâkanitik* — All my relations.**

Ali Tapaquon
principle and founder
Tatâga Inc.

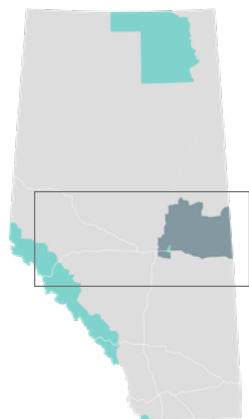
Suzanne Denbak
principle and founder
Cadence Strategies

05 DISCOVERING THE DESTINATION



Ukrainian Cultural Heritage Village, Tofield
Government of Alberta

THE NORTHEAST LAKELANDS



The Northeast Lakelands zone of Alberta is situated east of Edmonton, reaching east to Lloydminster at the Alberta/Saskatchewan border, north to the city of Cold Lake and west to Highway 827. The zone offers visitors an array of experiences and cultural discoveries, and two distinct landscapes to explore, as rolling prairies and farms soon turn into waterfront vistas overlooking the zone's many lakes.

Primarily a leisure destination, the Northeast Lakelands is considered one of Alberta's soft adventure playgrounds and is connected from end-to-end by the Iron Horse Trail, part of the Trans Canada Trail network.

Because of its large and diverse geographic area, the Northeast Lakelands TDZ — once further developed — could lend itself to multi-night stays as to repeat visitations.

Currently, the zone is best known for:

Lake country

The zone encompasses most of Alberta's lake country. Beaches, fishing, boating and other water activities are accessible all summer, while the winter season provides opportunities for ice fishing, skating and snowmobiling. Although the zone boasts lakes of all sizes, Lac La Biche and Cold Lake are the biggest and most popular.

Agritourism

The Northeast Lakelands offer visitors wide open farmland and ranches to explore. By connecting

visitors with the local farmers and ranchers, the region can develop agritourism operations showcasing their lifestyles while also diversifying their businesses.

Arts, culture and history

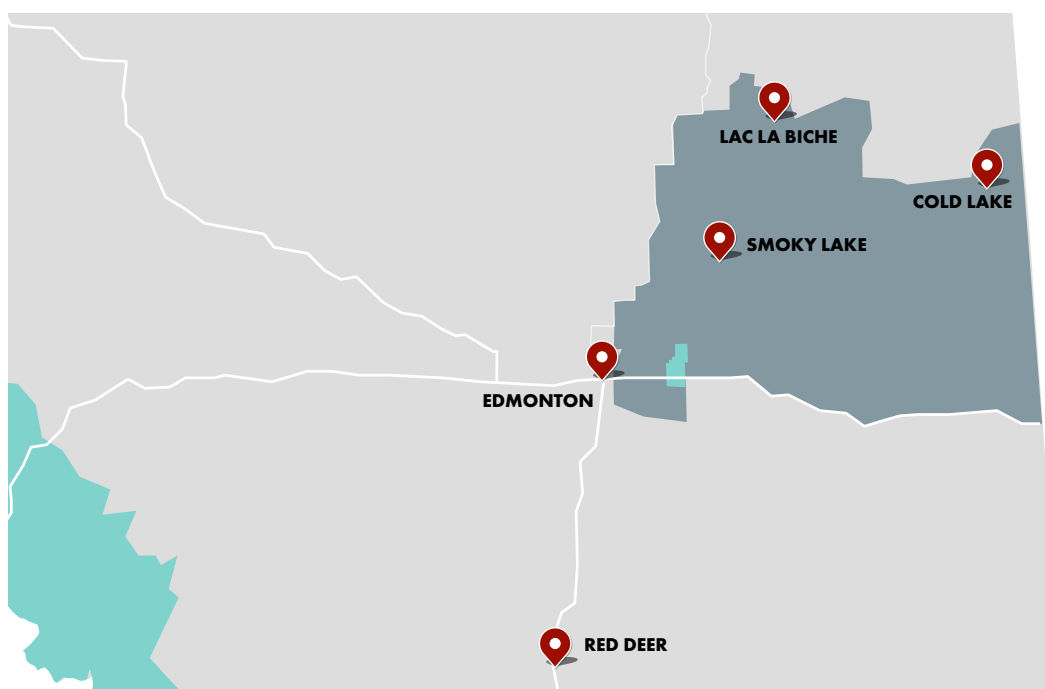
In this zone, there are four distinct groups that proudly celebrate their heritage and form a cultural fabric unique within Alberta. Whether visitors are hearing the stories of Alberta's First Nations, visiting Alberta's original Métis settlement, learning about the early French explorers or partaking in the celebrations and foods of Ukrainian settlers, the Northeast Lakelands appeal to the culturally curious.

Elk Island National Park

Alberta has some of the most iconic national parks in the nation, and Elk Island is no exception. Best known for being the first national park in Alberta to reintroduce and provide sanctuary to buffalo herds, Elk Island appeals to sightseers, campers and nature enthusiasts alike.

Soft adventure

The Northeast Lakelands were made for soft adventure enthusiasts. Connected by the Iron Horse Trail (part of the Trans Canada Trail network), year-round activities attract people from all over the province to partake in their favourite outdoor sports, including downhill and cross-country skiing, snowmobiling, riding OHVs, jetboating, sailing, cycling and mountain biking.



DEMOGRAPHICS AND POPULATION

In 2022, the Northeast Lakelands zone had a population of approximately 261,836, with 104,330 residing in Strathcona County. The cities of Lloydminster and Cold Lake are the largest urban population centres, followed by the towns of Bonnyville, St. Paul, Vegreville, and Vermilion. As of 2021, the average resident age in many parts of this zone is younger than the average for Alberta.

261,836

POPULATION

27,485

INDIGENOUS POPULATION

8.4%

POPULATION GROWTH
OVER PAST 10 YEARS

9.68%

UNEMPLOYMENT RATE

\$124,369

MEDIAN FAMILY INCOME

(Alberta Regional Dashboard, 2023; Statistics Canada, 2021)

ECONOMIC PROFILE

Several communities within this zone rely on oil and gas extraction and processing and other industrial sectors. This industry represents \$26.1 billion of the zone's \$27.7 billion major projects. Retail, tourism and recreation sectors are the next-largest economic contributors, accounting for just over \$400 million of the remaining \$1.6 billion.

9,330

BUSINESSES

95.3%

SMALL BUSINESSES

\$27.7B

MAJOR PROJECTS

(Alberta Regional Dashboard)

ACCESS

The Northeast Lakelands zone benefits from immediate proximity to the Edmonton International Airport and well-maintained highways connecting communities within the TDZ.

Currently, there is no public transportation between Edmonton and major communities in the zone.

The main highways servicing the zone from Edmonton include Highway 16, Highway 28 and Highway 29. Highway 16 sees the most activity, followed by Highway 29, where traffic counts increase in the summer. The highway network is critical to supporting tourism in this zone, with some highways supporting RV traffic.

POLICY AND PLANNING CONSIDERATIONS

A number of policy and planning documents were analyzed to better understand the regulatory environment of the Northeast Lakelands TDZ as it relates to tourism development. Key findings include:

- Northeast Lakelands TDZ land bases are diverse in ownership, management and uses.
- Crown lands support a wide variety of uses and activities, though they may require multi-jurisdictional participation and/or approvals to enable tourism development.
- The Lower Athabasca Regional Plan includes the Municipal District of Bonnyville, Cold Lake, and the County of Lac la Biche. This plan commits to the planning and development of the Lakeland region as an iconic tourism destination. The remainder of the Northeast Lakelands TDZ lies within the North Saskatchewan Regional Planning area, where development of The North Saskatchewan Regional Plan is in progress.
- The City of Fort Saskatchewan and Strathcona County are members of the Edmonton Metropolitan Regional Board and align with the board's 30-year plan for the growth of the Edmonton Metropolitan Region. The plan's objectives include: identifying and promoting opportunities for tourism and recreation, planning and developing recreation corridors throughout and beyond the region, and creating or enhancing value-added opportunities in the agricultural sectors and regional food systems to support agritourism.
- Development plans and economic development strategies in multiple municipalities in the TDZ are supportive of tourism development. For example, Lamont County, Strathcona County, Lac la Biche County, the Town of St. Paul, the Municipal District of Bonnyville and the Cities of Cold Lake and Lloydminster emphasize objectives and policies related to tourism development.
- The Victoria District Area Structure Plan guides future development in the area, including Métis Crossing in Smoky Lake County. Maintaining local working landscapes and promoting complementary tourism opportunities in the community are two of the plan's guiding principles.
- The Iron Horse Trail is an important part of this zone. The trail is managed by Northeast Muni-Corr Ltd., a non-profit organization whose board includes representatives from each of the 10 municipalities that the trail passes through. Northeast Muni-Corr advances the development of the Iron Horse Trail and controls several parcels of land along the multi-jurisdictional corridor. The organization is in a strong position to coordinate cooperative development initiatives involving more than one community.

DESTINATION ECOSYSTEM

Destination Marketing/Management Organizations (DMOs)

The Northeast Lakelands is presently represented by two tourism organizations, Travel Lakeland and Go East of Edmonton.

Travel Lakeland is a registered not-for-profit corporation established for marketing and destination development, whose jurisdiction includes the Northeast Lakelands TDZ. The destination management organization's membership base consists of tourism operators and businesses, chambers of commerce, Community Futures (Lakeland, Bonnyville, and Cold Lake), and municipalities throughout the Northeast Lakelands. Collaborating with economic development and tourism officers, the organization works with existing and emerging entrepreneurs seeking to enter and build up the tourism industry. In addition, Travel Lakeland is now hosting online content on its website for the Kalyna Country Ecomuseum — a heritage and eco-tourism district established in 1991-1992. Travel Lakeland's funding includes membership fees from businesses and operators, while municipalities pay a per capita rate for membership. However, the bulk of the funding is derived annually under Travel Alberta's Rural Development and Promotion grant program, which supports rural tourism organizations in destination development and promotion initiatives. For Travel Lakeland, these initiatives include developing culinary routes and immersive experiences to bring visitors through the zone. However, since the Rural

Development and Promotion grant program only funds single-year projects, one of Travel Lakeland's main challenges is securing long term predictable funding to support wages and multi-year initiatives that could be undertaken.

Go East of Edmonton identifies themselves as a Regional Tourism Organization focused on marketing. They operate as a non-profit organization with close affiliation to The Marketer, a for-profit organization. Its membership base comprises tourism operators and businesses, agricultural societies, historical societies, and municipalities throughout the Lakelands and within the Northeast Lakelands TDZ. Go East's revenue is primarily from memberships and paid marketing, with some support from Travel Alberta's Rural Development and Promotion grant program. Members pay an annual membership fee, in addition to paying for inclusion in marketing and promotional initiatives such as the Go East Travel Guide, website promotions, and Go East's annual summer Roadtrip Adventure Game.

Historically, the two organizations have not collaborated, which has limited the ability to create a unified voice to promote the zone. However, work is underway to build relationships between entities within the TDZ, creating a more cohesive and complementary voice.



Strathcona Wilderness Centre, Ardrossan
EEDC

Economic Development Organizations

Several counties and towns throughout the TDZ, including Strathcona County and the Municipal District of Bonnyville, have economic departments supporting tourism businesses and entrepreneurs within the TDZ.

Northeast Alberta Information HUB Ltd. (Alberta HUB) is northeast Alberta's regional economic development alliance, which includes local communities, businesses, industries, post-secondary educational institutions, and government partners. By maintaining business relationships and supporting collaboration, Alberta HUB and its members collaborate with Travel Lakeland by keeping the organization apprised of tourism development opportunities.

Smoky Lake Tourism Company is a collaboration between the Town of Smoky Lake, Smoky Lake County, and Métis Crossing Ventures Ltd. With an initial budget of \$1.6 million to invest in regional

tourism projects, this new corporation represents a collaborative regional approach to destination and economic development.

STEP Economic Development Alliance functions as the regional economic development organization working within the County of St. Paul. The strategic priorities include work to develop priority industries including tourism and agriculture, while also supporting workforce development and labour attraction.

Le Conseil de Développement Économique de l'Alberta (CDEA) helps promote the bilingual Albertan community and its tourism assets. The CDEA also supports bilingual businesses working under the ÉCONOMUSÉE® patented model to offer traditionally inspired contemporary artisanal products, showcase the process of their design and/or manufacture, and thus contribute to a cultural tourism experience.

VISITATION

In 2019, according to Travel Alberta's anonymized mobile data, 99 per cent of visitors to this zone were from within Canada and under one per cent were from the United States. Most of the visitation to the zone is domestic (89 per cent of the total are from within the province). The area does see some visitors from other parts of Canada; Saskatchewan accounts for just over seven per cent of Canadian visitors, followed by British Columbia and Ontario.

AB

VISITOR ORIGIN

The majority of visitors come to the area from nearby Edmonton (35 per cent), Lloydminster's Alberta side (18 per cent), Cold Lake (13 per cent), Lloydminster's Saskatchewan side (eight per cent), Wood Buffalo (seven per cent), and Calgary (four per cent).

36%

REPEAT VISITORS

Just over 55 per cent of visitors to the Northeast Lakelands zone visit twice or more yearly.

35 hours

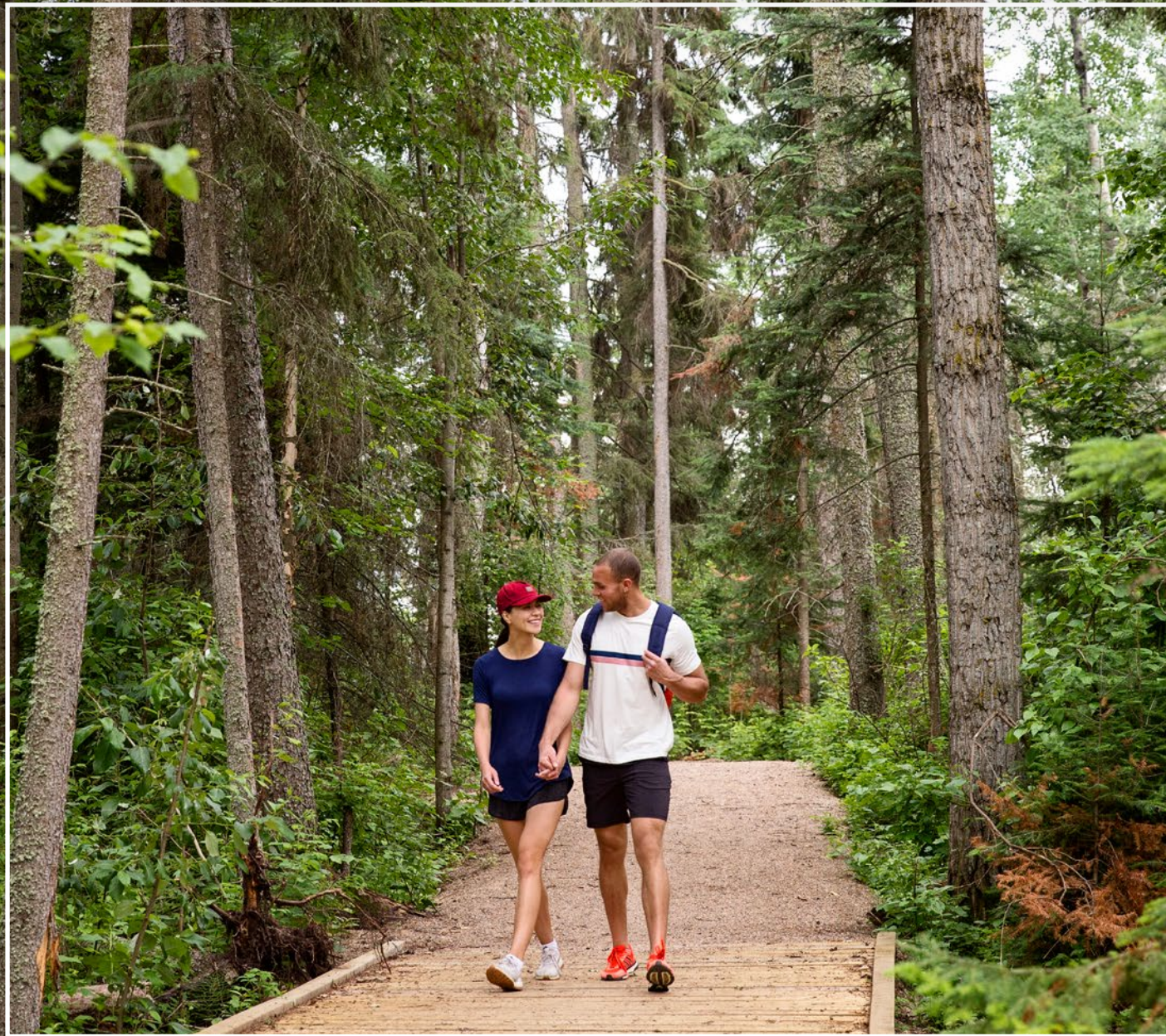
AVERAGE LENGTH OF STAY

On average, visitors spent just under 58 hours (two days and one night) in this zone. International visitors spend an average of just under 34 hours. Regardless of visitor origin, a longer stay (including overnight) will result in visitors spending more.

Note: Percentages represent the devices detected in the destination for the identified period. They do not represent total visitation and may be impacted by differing traveller technology or a lack of cell coverage.

(Near Mobile Data, 2019)

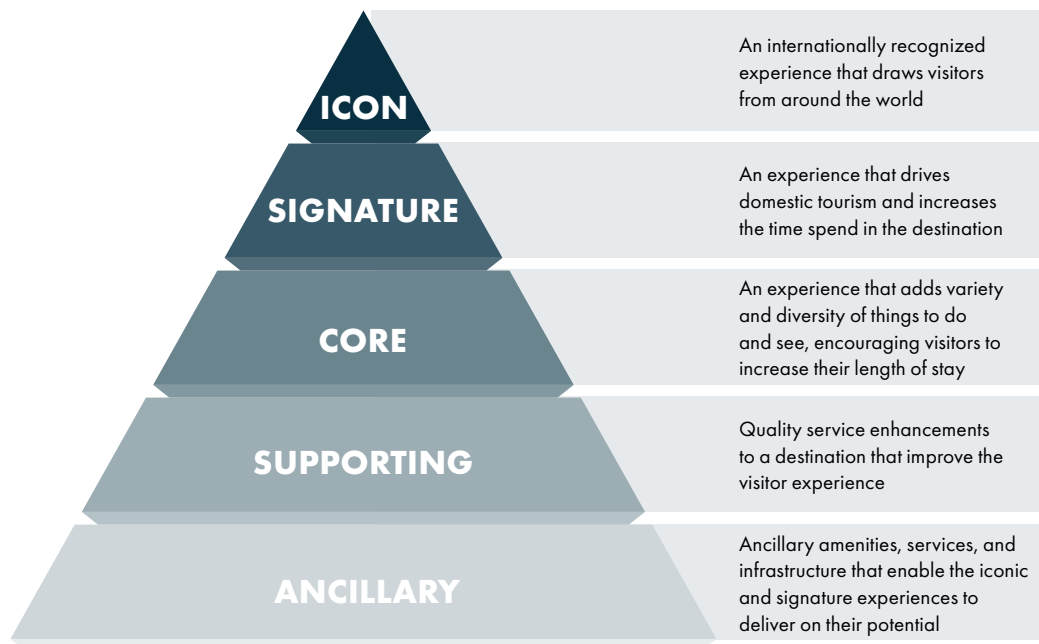
05 DESTINATION ANALYSIS



Sir Winston Churchill Provincial Park

SUPPLY AND DEMAND ANALYSIS

In order to fulfill the tourism potential of this area, it is imperative to understand its tourism products and experience and accommodation mix, and the role both play within the development zone. Moving forward, this understanding will guide targeted investment toward the right products and places.



(Adapted from Fáilte Ireland)

Currently, tourism products in the Northeast Lakelands TDZ are limited, and most of the products that do exist are considered core products. While a greater number of core products will help create awareness of the Northeast Lakelands as a tourism destination and support leisure travellers, filling multiple gaps in types of tourism products will be an overarching priority within the zone moving forward. Opportunities include developing Kinosoo Ridge Resort as an all-season resort with fixed-roof accommodations, as well as developing the Iron Horse Trail staging areas into a year-round recreation trail featuring both accommodations and services.

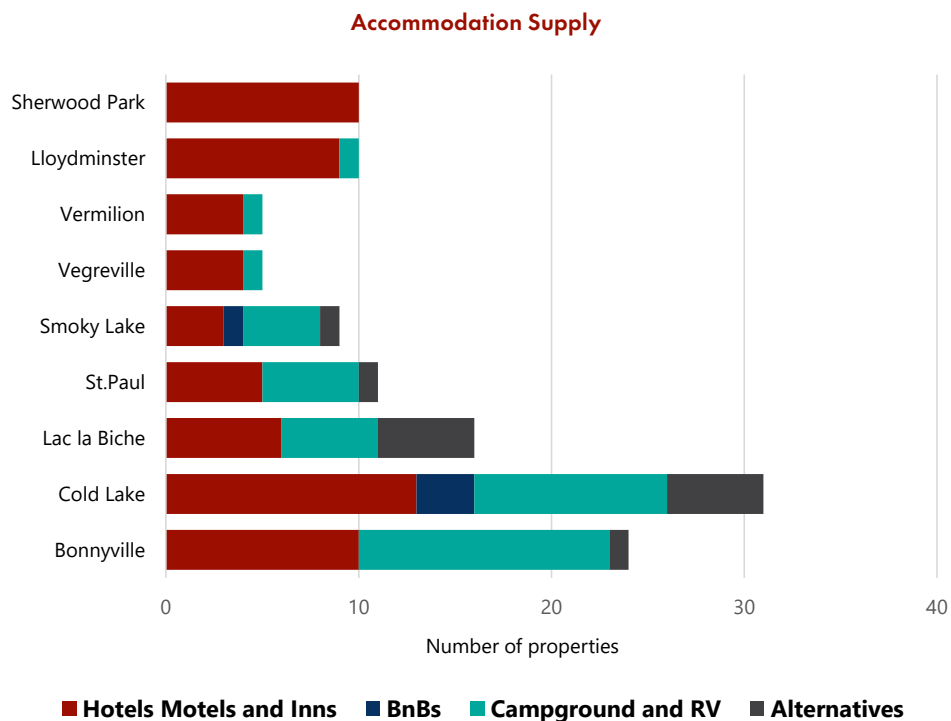


Twisted Fork, St. Paul

Supply: Accommodation Mix

Most accommodations in the Northeast Lakelands zone are economy-branded hotels concentrated in Bonnyville and Cold Lake, which generally support tradespeople working at nearby industrial sites. The accommodations provided at Métis Crossing (40 rooms) and a limited number of seasonal campgrounds are the exception to this rule.

Stakeholders recognize the limited supply and diversity of existing accommodations as a constraint to enabling further tourism development in the TDZ. For example, currently, no accommodations in the zone provide secure off-highway vehicle or mountain bike storage services.



(Source: STR, 2022; Floor13, IBI Group, 2023; Alberta Parks, 2023)

Supply: Products and Experiences

The 2022 tourism asset inventory was gathered by Floor 13 and Arcadis / IBI Group from the Alberta Tourism Information Services (ATIS) listings, identifying just under 200 total assets (including tourism-related products and experiences), with most in the Bonnyville, Cold Lake and Lac la Biche areas.

Local operators and attractions include:

- Métis Crossing Cultural Centre
- Kinosoo Ridge Resort and Aerial Adventure Park
- Ukrainian Cultural Heritage Village
- Native Friendship Centre Tipi and Trapper Tent at Sir Winston Churchill Provincial Park
- Strathcona Wilderness Centre
- Elk Island Retreat
- North East Muni-Corr Ltd. (Iron Horse Trail)

Provincial and national parks:

- Sir Winston Churchill Provincial Park
- Cold Lake Provincial Park
- Lakeland Provincial Park
- Lakeland Provincial Recreation Area
- Elk Island National Park
- Long Lake Provincial Park
- Moose Lake Provincial Park
- Whitney Lakes Provincial Park
- Vermillion Provincial Park

The Beaver Hills Biosphere, though not contained within the boundaries of the TDZ, is a UNESCO-designated biosphere immediately adjacent to the zone and a major attraction bringing in visitors.

According to Travel Alberta’s anonymized mobile data (2019), the most-visited tourism products and experiences in the Northeast Lakelands TDZ include:

- Elk Island National Park
- Vermillion Provincial Park
- Sir Winston Churchill Provincial Park

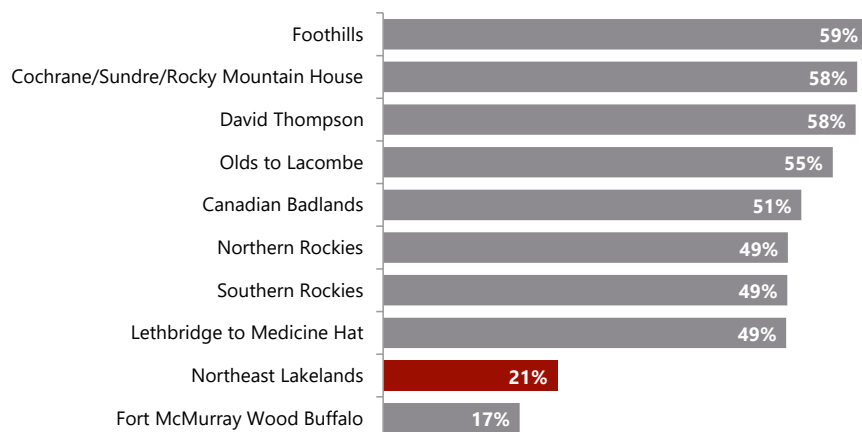
(Note: Many areas in this zone lack adequate cellular reception.)

Demand: Amongst Albertans

As part of perception research conducted by Travel Alberta in November 2022, over 1,000 Albertans were surveyed in order to better understand traveller perception of each of the 10 TDZs. This research indicated that:

- Albertans have very little awareness of what the Northeast Lakelands zone has to offer as a vacation destination.
- Only 23 per cent of respondents are likely to visit the zone, but there is the potential to significantly increase interest in the zone through new and enhanced visitor experiences.
- Peak season visits are much more likely in this zone, with almost 80 per cent of respondents identifying likely visits between June and August.

Familiarity with Destination (Per cent familiar with each TDZ)

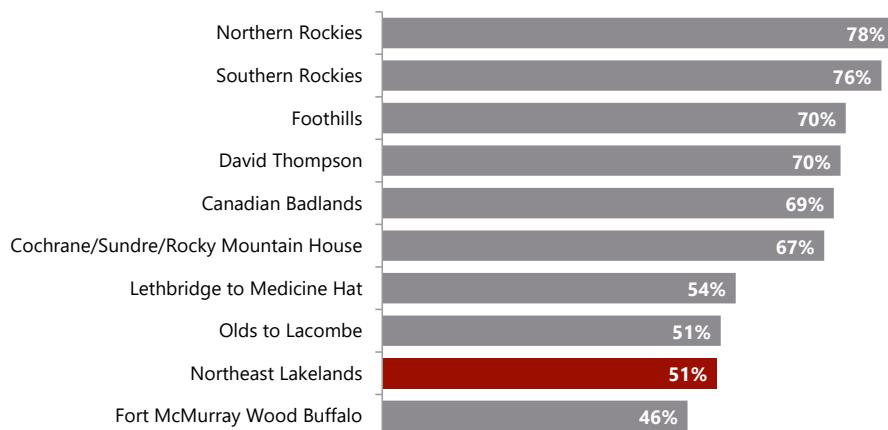


Only 20 per cent of Albertans are familiar with the destination and are likely to visit.



Elk Island National Park

Overall Impression of Destination (Per cent with positive overall impression of each TDZ)



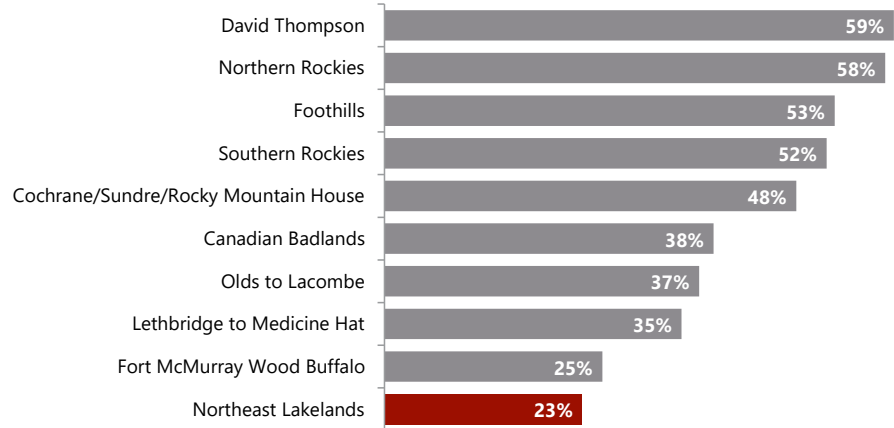
Likelihood to Visit Destination (Per cent likely to travel to each TDZ)

77%

MOST LIKELY TO VISIT DURING PEAK SEASON

49%

LIKELY TO ONLY STAY BETWEEN ONE AND TWO NIGHTS



Activities Albertans are most likely to enjoy in the Northeast Lakelands TDZ



(Source: Assessing Perceptions of Alberta’s Tourism Development Zones, Twenty31, 2023)

Demand: International Travellers

Top trip anchors (activities a visitor would centre their trips around) and supporting activities identified by recent market demand studies align well with resources in the Northeast Lakelands TDZ.

The greatest alignment between existing products and top trip anchors is with visitors from the US, who identify Northern Lights, nature parks, historical/archaeological/world heritage sites and camping as activities that would draw them to a destination.

Specific examples of such trip anchors represented in the Northeast Lakelands TDZ include: exploring Indigenous culture, traditions, or history; camping; historical/archaeological/heritage sites; Northern Lights/dark sky viewing; and local food and drink.

New products added within the Northeast Lakelands should help to build up and extend the summer season to drive shoulder and winter season visitation.

(Global Tourism Watch, 2021)

Demand: Alberta's Target Travellers

Travel Alberta has identified "Curious Adventurers" and "Hotspot Hunters" as the high-value travellers likely to spend more per visit, yield the highest return on investment, and contribute the most to the province's economic growth. Tourism businesses, communities and associations can attract these valuable visitors by tailoring products and experiences to their unique travel styles.



Lac La Biche Canadian Native Friendship Centre,
Sir Winston Churchill Provincial Park

The ideal travellers to the Northeast Lakelands are fuelled by adventure and discovery and willing to go the extra mile for unique, authentic experiences and activities. In other words, the Northeast Lakelands TDZ offers immense opportunities to attract Curious Adventurers, for whom travel is about getting a different perspective on the world. The Victoria Trail Voyageur Experience is a great example of the kind of experience Curious Adventurers look for. This interactive tour takes visitors through Métis Crossing, where they learn to set a beaver trap, savour dried bison and, finally, dance a lively Red River jig — an essential part of any authentic Métis celebration.



Métis Crossing, Smoky Lake
Indigenous Tourism Alberta / Roam Creative

The focused development of additional products and experiences could also attract Hot Spot Hunters to the Northeast Lakelands TDZ. For Hot Spot Hunters, travel is about achievement and accomplishments. They want to visit top attractions, participate in unique experiences, and connect with local experts. In this zone, Hotspot Hunters might seek to stay in the new sky watching domes at Métis Crossing (which offer guests a unique, luxury experience connecting with the night's sky and stars), or complete Alberta's only canoe circuit — a 38 km loop with four portages through four lakes in the Lac la Biche area.

Trends impacting tourism

As destination organizations and businesses at all levels look to adapt and thrive, it will be important they stay attuned to emerging trends that are driving the tourism industry forward. These trends, identified by Twenty31 in their 2022 Tourism Trends report, will impact supply and demand and shape the future of tourism over the short to long-term.

TREND:

Experiences are the new luxury goods

DESCRIPTION:

Because most people were unable to travel in 2020 and 2021, tourism has become a scarce, luxury good. The value of travel and tourism will increase even more as the 2020s continue, boosting consumer spending on unique experiences away from home.

KEY TAKEAWAY FOR TDZ

The Northeast Lakelands can provide unique and meaningful Indigenous and Ukrainian learning experiences to explore the zone's rich culture and history.

Regenerative travel going local

Regenerative travel will help make tourism a pillar for sustainable economic development for destinations. 83 per cent of global travellers will make sustainable travel a priority in the future, while 66 per cent want their travel spending to directly benefit local communities.

Regenerative tourism in the Northeast Lakelands is limited to a few operators of varying scales. However, the idea that tourism is a pillar for sustainable economic development in the zone is gaining traction, with businesses collaborating and supporting local where possible. This trend is especially noticeable in the development of new culinary experiences.

Single destination, longer stays

The complexity of arranging a trip will result in travellers booking fewer trips but increasing the length of their stay in a single country. "Travel less, travel better" will determine booking behaviour over the next few years.

This trend aligns well with many of the initiatives that the Northeast Lakeland communities are working on to build significant attractions to the zone that will encourage longer stays and repeat visitation.

Exotic destinations attract young travellers

Younger travellers are not looking exclusively for sun and beach destinations; they also want immersive adventure, often involving high doses of adrenaline and off-the-beaten-path destinations.

The Northeast Lakelands boasts a diverse range of parks, including national parks, provincial parks, and regional and provincial recreation areas, offering visitors a chance to explore the natural beauty and wonder of the zone.

Tourism labour shortage continues to be a bottleneck

While demand for labour in the hospitality sector remains strong, hospitality workers impacted by industry disruption and demographic trends are finding other careers. This shift away from hospitality will drive a long-term labour shortage, severely impacting service, availability of hotel rooms and other tourism experiences.

Securing adequate tourism labour continues to be a challenge as the sector competes with higher-paying jobs; this difficulty is exacerbated by the misalignment of the available workforce and opportunities for employment in tourism. Operators who offer local accommodations have successfully attracted workers during periods of limited availability.

(Source: Twenty31, 2022)

RESIDENT SENTIMENT

The success of developing tourism across Alberta's TDZs hinges on tourism's impact on the quality of life for local residents. Quite simply, if it's not good for residents, it's not good for visitors. Travel Alberta has been tracking resident sentiment across the province for the past year, and as part of this initiative, we assessed resident sentiment at a TDZ level, as highlighted below. Overall, residents in the Northeast Lakelands are interested in seeing more visitors in their community, an attitude that indicates they are open to seeing growth in the tourism sector and have a general awareness of the benefits the visitor economy can manifest within the Northeast Lakelands TDZ.

Highlights: Resident Sentiment

QUESTIONS	TOTAL ALBERTA RESIDENTS	NORTHEAST LAKELANDS RESIDENTS
Tourism is important to my community.	70%	59%
I would welcome more visitors to my community.	62%	65%
A strong tourism industry improved my quality of life.	61%	65%
The attractions, events and things to do here are an important part of making my community a vibrant place.	83%	85%
This is a vibrant community and area. There is always lots to see and do.	70%	73%
My community offers experiences I want to tell others about.	65%	72%
I can see the direct impact of tourism on my day-to-day life.	40%	24%

(Source: Stone Olafson, 2023)

SWOT ANALYSIS

Using findings from primary and secondary research and extensive stakeholder engagement, Floor 13 in collaboration with Arcadis /IBI Group conducted a strengths, weaknesses, opportunities and threats (SWOT) analysis to evaluate the Northeast Lakelands TDZ. The analysis takes into consideration both the current and potential future drivers that will influence tourism within the zone.

Strengths

- Unique cultural experiences (Métis, Indigenous, French, Ukrainian) throughout the TDZ
- Métis Crossing (including The Lodge at Métis Crossing) — the zone's premier attraction — offers immersive Métis experiences and accommodations
- Iron Horse Trail, a well-established recreational asset, along which residents and visitors can explore 297 km of trails through ten municipalities
- The existing ski hill, Kinisoo Ridge Resort, which offers potential for the development of year-round activities
- The zone's abundance of lakes and waterfronts, including much of Alberta's cottage country
- Small, tourism-related entrepreneurs who are developing their businesses (distilleries, museums, culinary establishments, etc.) on an ongoing basis
- The immediately adjoining Edmonton Metropolitan Region — well-connected and easily accessible to the Northeast Lakelands zone — is a significant market catchment area including 1.32 million people and an international airport
- Ongoing development in Cold Lake, which includes trails, attractions and soft adventure
- Increased inter-regional collaboration between businesses within this zone

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Weaknesses

- Few significant upper-scale accommodations
- Long travel distances between tourism assets and towns
- Regulatory policies that inhibit the development of year-round experiences (mountain biking, OHV use, snowmobiling, etc.) and accommodations on the zone's Crown land
- Inadequate tourism-related wayfinding (a challenge for a limited number of operators)
- Over-reliance on the Edmonton market
- Lack of anchor attractions other than Métis Crossing
- Lack of alignment between DMOs and tourism organizations; lack of a common tourism narrative

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Opportunities

- Develop staging areas of Iron Horse Trail
- Increase support for businesses navigating the regulatory requirements for tourism development
- Further develop Métis Crossing (additional night sky pods, cross-country skiing)
- Develop a more robust accommodations sector (hotels, RV, camping, B&B)
- Create mountain bike experiences in Cold Lake and Kinisoo Ridge Resort
- Further develop buffalo-centred discovery and learning experiences at Elk Island Nation Park and Métis Crossing
- Create interpretive e-bike tours along the historic Victoria Trail
- Develop Lac la Biche cottage rentals in cooperation with Beaver Cree Nation
- Further develop agritourism experiences (cheeseries, ranches, butchers and meat processors, distilleries)
- Development along the Cold Lake waterfront
- Expand the cultural tourism opportunities throughout the zone (Métis, French, Ukrainian)
- Work with key communities through a cluster-based approach to identify high-value investment opportunities aligned with the demand for nature-based tourism products and experiences

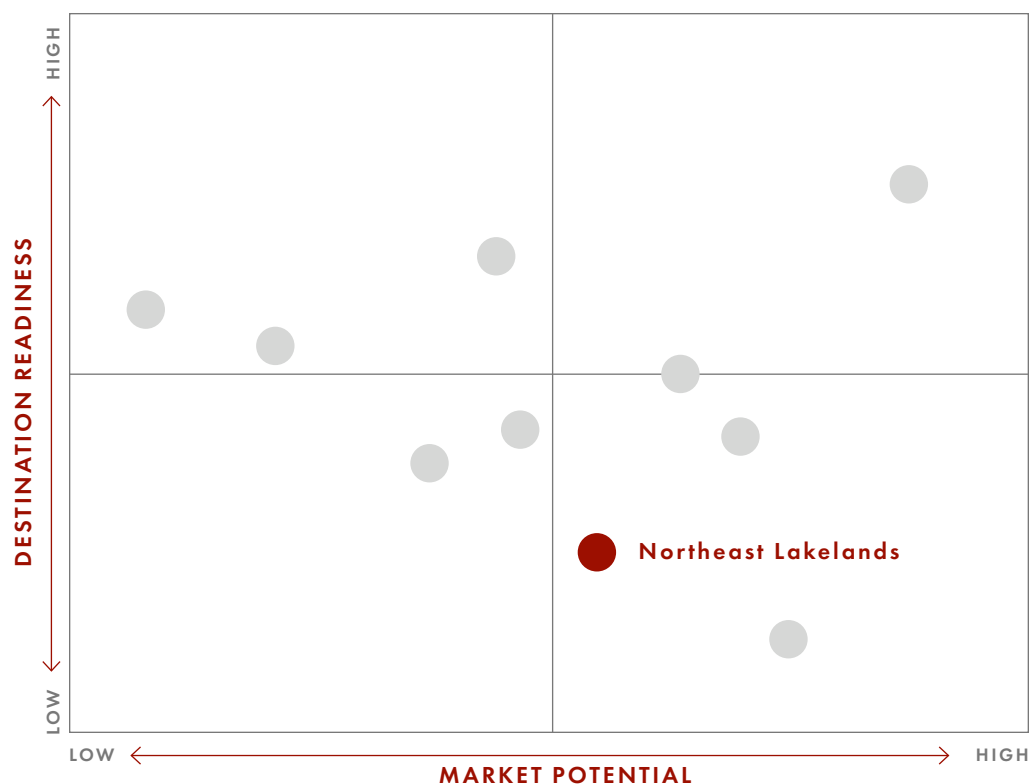
Threats

- Policies limiting tourism growth in high-opportunity waterfront areas
- Minimal support for businesses seeking to develop new products and experiences
- Lack of accommodations, including boutique hotels and unique accommodations
- Unaddressed broadband and transportation challenges, which make it difficult for visitors to safely access tourism experiences in the zone
- Tourism is not viewed as a priority by some communities facing revenue challenges due to the loss of larger industries

DESTINATION MATURITY AND READINESS

The Northeast Lakelands TDZ has significant potential (as shown in red on the matrix) to become an enabling environment for tourism with an improved mix of tourism products and experiences. To determine effective resource allocation moving into the design phase, Travel Alberta assessed market potential and community readiness in destinations within the Northeast Lakelands zone. This initial assessment will be further validated with input from communities across the TDZ. Key issues pertaining to this zone include:

- Lack of support for navigating development requirements
- Limited appreciation for tourism, which is not seen as an economy-driving industry compared to other sectors (for instance, oil and gas)
- Complicated rules and lengthy processes, which make the application approval of new projects uncertain
- Lack of alignment of strategic vision and priorities for tourism development throughout the zone between the tourism entities and municipalities is contributing to inertia and indecision



The grey dots represent the position of the Northeast Lakelands TDZ relative to the ten other TDZs across the province.

05 VISION FOR THE FUTURE



Beaver River Trestle, Iron Horse Trail
Brandon Born @brandonborn

“By 2035 our tourism region will become a recognized year-round destination built around our natural assets (water and wilderness) and cultural assets (history and heritage), and supported by excellent communications, transportation and other infrastructure.”

— Northeast Lakelands Steering Committee

DESTINATION 2035

By 2035, the wild beauty, diverse waterfronts and wide-open spaces of the Northeast Lakelands will draw domestic and international visitors to experience outdoor adventure in both well-groomed recreation sites and untarnished wilderness. The zone’s unique heritage and opportunities for cultural exploration will be recognized by those seeking to discover their roots, expand their understanding of Canada’s complex cultural fabric, and learn more about the region’s history. Agricultural experiences will help guests connect to residents and to the land, and locally produced food and drink will offer them a “taste of place” that is unique within Alberta.

The visitor experience in the Northeast Lakelands will be defined by four distinct experience categories: recreational, soft adventure, cultural

and culinary. Activities associated with these distinct categories include: water-based recreation (boating, sailing, fishing, swimming, canoeing, and kayaking); wilderness recreation (hunting, camping, hiking, OHV use, snowmobiling, skiing, cross country skiing); Métis, Ukrainian, French and Indigenous cultural experiences; and foods, cheeses and breweries.

The seven primary clusters that align with these distinct experience categories are: Smoky Lake, Lac la Biche, St. Paul, Vegreville, Vermillion, Cold Lake and Lloydminster. The development of experiences along the many routes linking these primary clusters will greatly aid in driving overnight visitation, while supporting repeat visitation.

STRATEGIC INITIATIVES

In support of tourism development within the Northeast Lakelands TDZ, multiple strategic initiatives were identified by local stakeholders and communities. This included:

01. Increasing year-round accommodations, specifically unique accommodations and accommodations within proximity to recreational assets that would interest a leisure traveller
02. Supporting communities, businesses and stakeholders to develop new and enhanced year-round tourism products and experiences, with a focus on cultural and heritage tourism products and experiences and recreational/soft-adventure experiences (such as Iron Horse Trail)
03. Working with local organizations to better coordinate with each other, play a larger role in developing the visitor economy and increase their capacity to operate sustainably
04. Improving technological connectivity (including mobile reception and broadband) to and within the zone, in key areas and along main routes
05. Creating an enabling environment to attract and retain employees within the tourism industry
06. Working with municipalities to explore opportunities to modernize policies affecting the continuing development of agritourism

OUTCOMES

Successful implementation of these strategic initiatives will enable the development of products, accommodations, and robust multi-day itineraries that increase the length of time visitors stay and how much they spend throughout the Northeast Lakelands TDZ. Specifically, the desired outcomes of these initiatives include:

Improved seasonality of visitation

Businesses will operate predictably, visitors will have positive experiences, and community members will appreciate the value visitors bring to their communities.

Public and private sector investment

The identification of specific gaps in products, experiences and infrastructure will have created awareness of community needs and market demand, spurring private and public sector investment.

Capacity and capability

Tourism companies, entrepreneurs and destination organizations across the province will be well-equipped to expand, establish and support their businesses, creating jobs and more vibrant communities.

Awareness and understanding of benefits

Tourism growth will result in a more diversified economy, reduce dependency on other sectors, improve quality of life for residents and legitimize the benefits of tourism in this TDZ.

Reconciliation and cultural awareness

If the results of the ongoing Indigenous engagement in the zone show that local Indigenous communities are in favour of tourism development, Travel Alberta will collaborate with Indigenous Tourism Alberta and Indigenous tourism operators to foster growth in the sector. Community-led tourism will offer opportunities for economic development, the sharing of cultures and the development of infrastructure that will benefit residents.

Cooperation among communities

Communities will bring their unique perspectives and assets to the table to develop strong tourism products and experiences that attract visitors to the zone and encourage them to stay longer.



Métis Crossing, Smoky Lake
Indigenous Tourism Alberta / ROAM Creative

06 CONCLUSION AND NEXT STEPS

With its vast prairies, pristine lakeside communities, and mosaic of several different cultural heritages, the Northeast Lakelands TDZ represents a significant opportunity to develop tourism infrastructure, amenities, products and experiences related to recreation, soft adventure, cultural exploration, and encounters with the local agriculture and culinary scene.

In order for the Northeast Lakelands zone to realize its potential, tourism stakeholders and local communities must:

- Develop new unique and upper-scale accommodations throughout the TDZ
- Significantly increase the number of tourism experiences available to visitors during the shoulder and winter seasons
- Develop anchor attractions on Lac la Biche and Cold Lake to draw visitors beyond Métis Crossing and farther into the zone — doing this will not only encourage new visitors to explore the entirety of the Northeast Lakelands, but also increase the number of repeat visits and overnight stays within the TDZ
- Take full advantage of the possibilities for tourism development offered by the zone's considerable natural assets, particularly The Iron Horse Trail, which connects 10 municipalities and is a vital asset for the TDZ
- Enhance collaboration between municipalities and tourism partners, and encourage stakeholders to think holistically regarding destination development and promotion of the TDZ (particularly by focusing on complementary development of the seven primary clusters identified in this report and by developing a cohesive brand for the zone)
- Increase and improve broadband/mobile infrastructure throughout the zone, thus empowering tourism businesses and operators, as well as facilitating a better experience for visitors navigating the TDZ or looking to share details of their trip

Successful implementation of the strategic initiatives found in this report will realize the area's potential and create new opportunities for regional growth and prosperity. As we move into the next phase of this project, we will build on these findings to inform the development and execution of our tourism goals for the Northeast Lakelands TDZ.



Métis Crossing, Smoky Lake
Indigenous Tourism Alberta / ROAM Creative



**CONTACT YOUR DESTINATION
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