

TOURISM DEVELOPMENT ZONE

Canadian Badlands



DISCOVERY
REPORT
2023

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Front cover:
Royal Tyrrell Museum, Drumheller

Atlas Coal Mine, East Coulee

PREFACE

Steeped in natural and cultural history spanning millions of years, the Canadian Badlands offer visitors an expedition into the extraordinary. The zone’s tremendous but yet-to-be-unearthed potential represents a unique opportunity for the Badlands to become a one-of-a-kind tourism destination, attracting visitors from across Canada and the world.

With nearby destinations like the Rockies becoming increasingly expensive and popular among visitors in the summer, communities in southern Alberta understand that the time is ripe to develop existing assets and create new ones — staking a claim on tourism and ultimately, providing a competitive, viable, alternative destination in Alberta.

This Destination Development Discovery Report for the Canadian Badlands 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
- Builds a strong business case for investing in the Canadian Badlands TDZ in order to capitalize on existing assets and catalyze future growth and prosperity
- Demonstrates that it will be key to the development of this area to position the Canadian Badlands as an attractive and enigmatic alternative to the Rockies

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 Canadian Badlands 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.



Brooks Aqueduct, Newell County
Neil Zeller @neil_zee

03 INTRODUCTION



Royal Tyrrell Museum, Drumheller

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 Canadian Badlands 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 and 7 signatories, the Blackfoot Confederacy, Nakota Sioux, Tsuut'ina, Stoney Nakoda, Cree, Dene, and Saulteaux homelands. We also acknowledge members of the Red Deer Métis District, Medicine Hat Métis District, and Rocky View Métis District within the homeland of Métis and the Otipemisiwak Métis Government, as well as Indigenous Peoples living in urban areas throughout the Canadian Badlands. 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 7

APPRECIATION

Travel Alberta would like to thank all those who participated, gave their time and shared their knowledge with us in the creation of this Discovery Report.

Please note, Indigenous engagement is currently underway.

- **Brooke Christianson**, vice president, Canalta Properties
- **Deborah Reid Mickler**, board member, Brooks Region Tourism
- **Jamie McIntosh**, executive director, Brooks Region Tourism
- **Julia Fielding**, executive director, Travel Drumheller
- **Lisa Tiffin**, community development manager, City of Brooks
- **Mark Nikota**, economic development officer, Harvest Sky Economic Development
- **Paul Muir**, executive director, Rosebud Theatre & School of the Arts
- **Wanda Diakow**, economic development officer, Special Areas Regional Economic Development
- **Wendy Gerbrandt**, economic development officer, Community Futures Wildrose

COMMITMENT TO SUSTAINABILITY & REGENERATIVE TOURISM

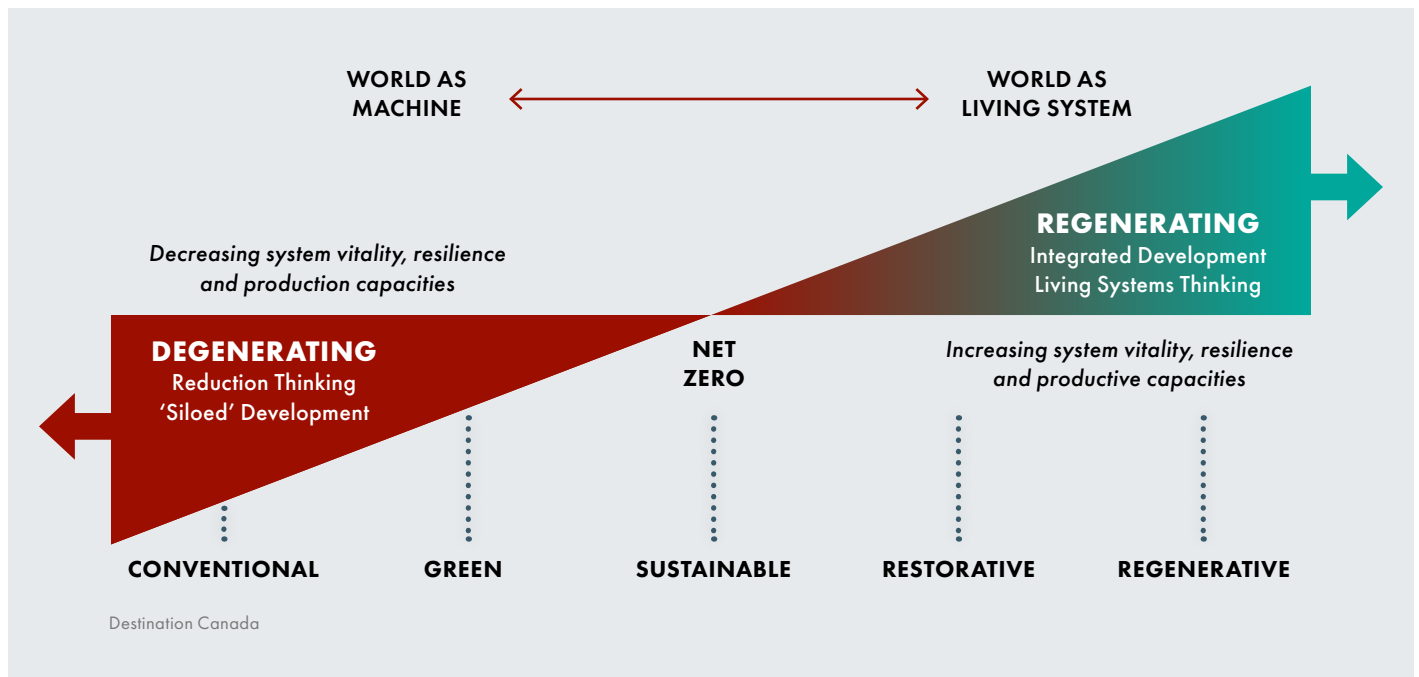
Tourism is a key economic sector in Alberta with strong potential to diversify the economy, create jobs, grow Indigenous tourism businesses, bring the “taste of place” to our guests’ tables and build vibrant communities. It also allows us to preserve and share culture and history, maintain or enhance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



Bleriot Ferry Port, Kneehill County, Starland County

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 Canadian Badlands TDZ work together to address the following relevant inter-related elements:



(Adapted from Failte Ireland)

METHODOLOGY

Travel Alberta partnered with consulting firm Twenty31 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 action steps toward the design of a DDP for the Canadian Badlands TDZ.

In the **“discovery and destination profiling”** phase, Travel Alberta worked with the consulting team to access research material, build a steering committee that included local operators and government representatives, and establish a framework for engagement.

In the **“exploring, imagining and visioning”** phase, the consulting team completed two visits to tourism sites within the zone, facilitated two visioning sessions with the steering committee and other stakeholders to determine aspirations for the zone, facilitated two regional stakeholder input sessions, interviewed over 60 stakeholders, conducted a Canadian Badlands tourism industry survey, facilitated steering committee validation workshops, and created a steering committee prioritization lab.



Barney's Adventure Park, Drumheller

04 STAKEHOLDER ENGAGEMENT



Downtown Drumheller

173

Stakeholders

183

Businesses

9

Communities

WHAT WE HEARD

In order to gain a comprehensive understanding of the Canadian Badlands 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:

- Diversity, quantity and seasonality of accommodations is a priority. While many service hotels exist to support workers from other economic sectors within the main centres, leisure visitors need more options that meet their expectations.
- The area's stunning landscape, paleontological discoveries, friendly people, rich agricultural history and natural resources are significant tourism assets.
- Seasonality of regional experiences, quantity and quality of unique accommodations and restaurants are big challenges for the sustainability of the destination. There is a need for more year-round tourism products.
- There is a need for continued fostering of a vibrant downtown core in Drumheller.
- While multiple plans have been completed to explore tourism in this area, their many competing priorities mean that funding to implement any one comprehensive strategy is limited.
- There is a need for unified leadership across the TDZ that is focused on tourism.
- There is a significant need for tourism to be prioritized outside of the community of Drumheller in order to create a common tourism vision for the Canadian Badlands. Extended prioritization of tourism will also result in a greater alignment of tourism stakeholders in the TDZ.
- There is a significant need for new, innovative, and big ideas to help transform tourism in the Canadian Badlands.
- Attracting, retaining and housing skilled labourers is a significant challenge.
- The Canadian Badlands trail system could be optimized to accommodate more visitor segments, such as families and soft adventure enthusiasts.

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

05 INDIGENOUS ENGAGEMENT



Blackfoot Crossing Historical Park

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.

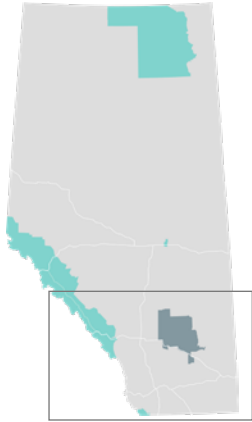
Suzanne Denbak
principle and founder
Cadence Strategies

05 DISCOVERING THE DESTINATION



Red Deer River Adventures, Drumheller

THE CANADIAN BADLANDS



The Canadian Badlands TDZ, located east and southeast of Calgary, has a one-of-a-kind landscape carved out by the elements over millions of years. Offering visitors a rich, immersive historical experience through its provincial parks and historic sites and museums, the zone also boasts several unique small towns, as well as the major service centres of Drumheller and Brooks. The town of Drumheller anchors the area and provides opportunities for visitors to explore rocky canyons, coal mining ghost towns and cowboy hangouts.

Scenic vistas

The zone is a true scenic wonder with excellent viewpoints from Horseshoe and Horsethief Canyon, Dinosaur Provincial Park and many other lookouts into the Drumheller Valley. Visitors can also explore breathtaking landscapes in Midland Provincial Park, Kinbrook Island Provincial Park and Tillebrook Provincial Park.

Historical discovery

From prehistoric dinosaur discovery to tours of ghost towns, the zone offers history buffs the opportunity to explore the changes wrought by geological and cultural shifts over millions of years. The Royal Tyrrell Museum and the Atlas Coal Mine National Historic Site are both popular historic attractions.

Arts and culture

The zone's thriving arts and culture scene demands national and international attention for attracting renowned artists and productions. Well-known venues such as the Rosebud Theatre and Badlands Amphitheatre continue to grow in popularity among artists and visitors alike.

Agriculture and culinary experiences

Farms and ranches populate the zone outside of the valley and offer visitors the opportunity to immerse themselves in Alberta's "taste of place." There is an opportunity to develop the farm visit sector, leveraging the appeal of the several farmers' markets in this TDZ.

Soft adventure

The Canadian Badlands hasn't always been a hotbed for adventure enthusiasts, but it's slowly gaining attention for its river adventures, hiking, and bike-friendly terrain.

Film tourism

Multiple high-profile movies (including *Ghostbusters 3: Afterlife*) and long-running television series have placed the Canadian Badlands zone on the map for producers and fans alike. New and ongoing productions will likely further enhance the zone's appeal for national and international visitors.



DEMOGRAPHICS AND POPULATION

This area, comprised of Brooks, Drumheller, Three Hills and Hanna, has a population of just over 28,000, with majority residing in Brooks (14,000) and Drumheller (8,000). Drumheller is the service centre for an outlying population of over 30,000, who come in from Starland County, Kneehill County, Special Area 2 and Wheatland County. It is expected that until 2046, the population within this TDZ will grow much slower than in other areas of the province and will have a higher percentage of people over the age of 65.

28,472

POPULATION

1,035

INDIGENOUS POPULATION

-1.02%

POPULATION GROWTH
OVER PAST 10 YEARS

9.43%

UNEMPLOYMENT RATE

\$99,973

MEDIAN FAMILY INCOME

(Alberta Regional Dashboard, 2023; Treasury Board and Finance, 2021)

ECONOMIC PROFILE

Both Drumheller and Brooks have strong agricultural industries. Both towns are involved in the oil and gas sector, though only Brooks is also involved in renewable energy.

Other key sectors in the Drumheller area include tourism and film production, which has seen some growth over the past several years. While tourism is a seasonal sector in this community, in the summer it plays an important role in the local economy.

1,174

BUSINESSES

96.2%

SMALL BUSINESSES

\$35M

MAJOR PROJECTS

ACCESS

The Canadian Badlands TDZ lies approximately 170 km east and south of Calgary, benefitting from ease of access to Alberta's largest airport, Calgary International Airport. The vast zone of the Canadian Badlands is transected by a number of major roadways, which are largely paved highways, including the Queen Elizabeth II Highway (QEII), the Trans-Canada Highway (Highway 1), and highways 56, 21, 9 and 12.

While it is easy to access the Badlands from Calgary, constraints for tour vehicles (such as the inability to turn around in a safe way on major highways) create challenges for tour groups that might otherwise visit major attractions, like the hoodoos.

POLICY AND PLANNING CONSIDERATIONS

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

- The majority of the land within the TDZ is private, and most of it is used for agricultural purposes. There is a limited amount of crown land, which is used for grazing, and a significant number of subsurface leases for oil and gas.
- Travel Drumheller's Destination Development Plan (distinct from this report) was finalized in March of 2023.
 - The 2023 plan was created to address short-term and systemic challenges impeding Drumheller's tourism growth potential, and to actively seek out opportunities to sustainably expand tourism and attract the financial resources required for the town to become a complement to Alberta's other legacy destinations.
 - The plan focuses on all attraction assets within the town (along with their stakeholders), as well as some Tier 1 locations that complement Drumheller, including Horseshoe Canyon, Horseshoe Canyon (Kneehill County), Starland County and Rosebud.
- Drumheller recently completed a downtown revitalization strategy with the goals of:
 - Affirming the downtown's role as the heart of public life
 - Becoming an unmissable part of the southern Alberta visitor experience
 - Hosting diverse and thriving businesses
 - Supporting a growing community of residents
 - Connecting people to the Red Deer River and surrounding Badlands landscape
- Drumheller's Municipal Development Plan commits itself to the development of the visitor economy. The plan supports a strong tourism vision with many of its overarching goals, including:
 - Develop a world-class open space and trail system linking landscapes, neighbourhoods and other unique attractions of the town
 - Conserve and enhance the uniqueness of neighbourhoods in Drumheller as an integral part of experiencing the town
 - Enhance the transportation systems to expand the reach and diversity of mobility options
 - Leverage Drumheller's tourism and recreation industries, as well as local talent, to grow and diversify the economy
- Kneehill County has developed a Tourism and Recreation Master Plan to:
 - Increase residents' quality of life by effectively delivering recreation services
 - Establish a tourism economy by developing tourism sites and programs
- Complementing Kneehill County's plan and in alignment with the Travel Drumheller DDP, the Horseshoe Canyon Master Plan aims to position Horseshoe Canyon as a premier attraction and as a catalyst for new visitor experiences in the zone.
- Provincial parks within the zone are managed according to the mandate of their park classification, which is to preserve natural heritage of provincial significance or higher while supporting outdoor recreation, heritage tourism and natural heritage appreciation activities that depend upon and are compatible with environment protection.

DESTINATION ECOSYSTEM

Destination Marketing/Management Organizations (DMOs)

There are two key DMOs within the Canadian Badlands TDZ.

Travel Drumheller, a not-for-profit with three full-time staff members who report to a board of directors, identifies itself as the DMO for the Drumheller Valley. Travel Drumheller is funded primarily through a voluntary destination marketing fund collected by accommodation providers in Drumheller. The organization's overarching priorities are:

- Promote Drumheller as a year-round tourism destination for leisure travel, group tours, conventions and community events
- Work in collaboration with tourism organizations, businesses and community groups to bolster Drumheller's tourism profile
- Offer opportunities and increase access to training and networking opportunities for tourism partners in Drumheller
- Offer support to organizations involved in the tourism industry
- Advocate and create education opportunities, as well as create connections to other organizations that support tourism



Black Mountain Roasters, Drumheller

Brooks Regional Tourism Association, a not-for-profit with one full-time staff member who reports to a board of directors, is the DMO for the Brooks area. Brooks Regional Tourism Association is funded primarily through a destination marketing fund collected by local hotels, which is augmented with funding from the City of Brooks and the county. Brooks Regional Tourism Association's strategic goals are to:

- Enhance destination brand awareness and conversion
- Facilitate impactful tourism product and destination management
- Engage in influential destination partnership and advocacy communications
- Affect higher organization services and resources

There have been previous attempts at developing a regional DMO to encompass the entire zone. The Canadian Badlands Ltd. (CBL) was established as a Part 9 not-for-profit DMO in 2006, with the mandate to support tourism product development in south-eastern Alberta. Over its 15 years in operation, CBL grew to include 66 members and approximately 90,000 square kilometres. In recent years, CBL experienced a decline in membership (it lost key partners Lethbridge and Medicine Hat in 2020) that left the organization with 43 members in September 2021. This organization ceased to exist in 2021, but many legacy elements of the CBL's efforts are still apparent throughout the zone.

Economic Development Organizations

Economic development in Drumheller is led by one municipally employed economic development officer who also sits on the Travel Drumheller Board of Directors to ensure continuity between tourism development, business attraction and development projects. Areas of strategic focus for economic development include tourism, film, manufacturing and agriculture. Housing and downtown revitalization are also important pillars for economic development in Drumheller.

The City of Brooks has an economic development office overseen by a joint services committee and hires the Brooks Regional Tourism Association to deliver tourism marketing and promotion. The economic development office's areas of strategic focus are entrepreneurship; business retention and expansion; investment readiness and attraction; and branding and promotion.

VISITATION

According to Travel Alberta's anonymized mobile data, in 2019, 98.1 per cent of visitors to the Canadian Badlands TDZ were Canadians, while only 1.6 per cent of visitors hailed from the US. At the provincial level, Albertans made up approximately 88 per cent of the visitors, followed by residents of Saskatchewan at just under five per cent, British Columbia at two per cent and Manitoba and Ontario at 1.4 and 1.3 per cent, respectively. In comparison to other TDZs, this zone sees relatively diverse visitation from across Canada.

AB

VISITOR ORIGIN

Visitors to the Canadian Badlands from within Alberta come from Calgary (12.1 per cent), Strathmore (9.9 per cent), Newell County (6.6 per cent), Wheatland County (6.3 per cent) and Rocky View County (5.0 per cent).

50%

REPEAT VISITORS

Fifty per cent of visitors to the Canadian Badlands visit two or more times per year.

48 hours

AVERAGE LENGTH OF STAY

Albertans spend on average approximately 52 hours in the zone. This length of stay surpasses that of international visitors, who spend an average of 31 hours, and US visitors, who spend an average of 16.5 hours. Note that Albertans could be spending more time in the zone because they are primarily visitors from the service and industrial sector, as opposed to leisure visitors.

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.

(Source: Near Mobile Data, 2019)



Atlas Coal Mine National Historic Site, East Coulee

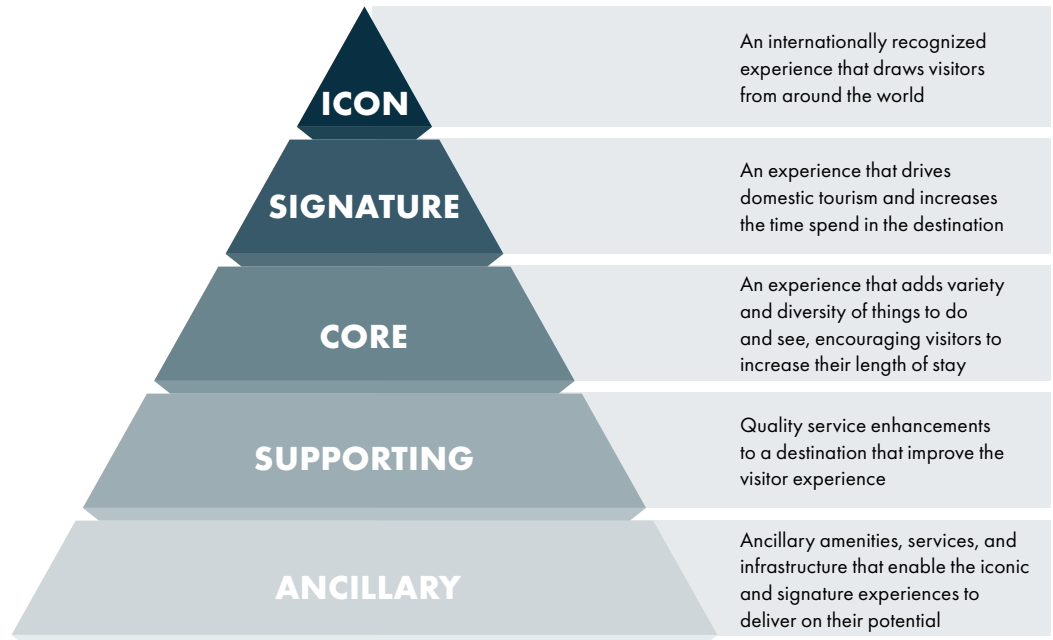
05 DESTINATION ANALYSIS



Last Chance Saloon RV & Campground, Wayne

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 Failte Ireland)

This zone offers a variety of product types ranging from core (for instance, the Rosebud Theatre) to signature (for instance, the Royal Tyrrell Museum) and icon (for instance, Dinosaur Provincial Park). However, while there is a variety of products, there is a lack of quantity, especially year-round. There is significant opportunity for the development of iconic and signature products. Further ancillary and supporting products, such as boutique hotels, will be needed to support the growth of these top-tier products.



Valley Brewing, Drumheller

Supply: Accommodation Mix

Most accommodations in the Canadian Badlands zone are economy-branded service hotels, with an estimated number of rooms at just over 1,500 concentrated in Drumheller and Brooks. There are many campgrounds within the zone, along with some B&Bs and unique accommodations such as barn-style cabins and canvas yurts. The ratio of campgrounds to higher service accommodations, correlates with the area’s visitor mix and length of stay data. Our research shows that Albertans, who are more likely to stay in a campground, stay longer in the Canadian Badlands TDZ, in comparison to travellers from the US and other countries.

Moving forward, we recommend prioritizing “glamping” options and hotel development in the upscale to upper-upscale categories, which currently aren’t well-represented in this TDZ.

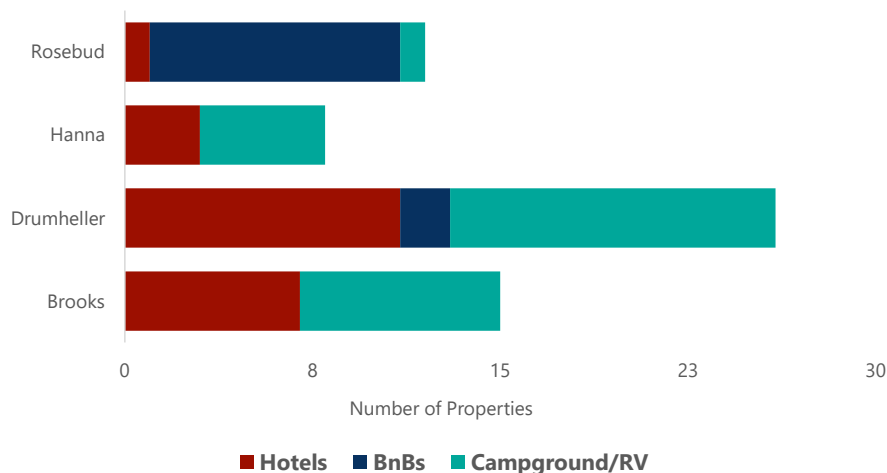
There are several new unique accommodation properties currently in the planning or development stage, which will address some of the zone’s need for seasonal (summer) accommodations. These include:

- Raptor Ridge: a new glamping and boutique tiny cabin development with approximately 10 units
- Good Knights Medieval Encampment: three new unique accommodation units
- Glamping units in Horseshoe Canyon

Supply: Products and Experiences

An asset inventory conducted by Twenty31 identified just over 200 tourism-related products and experiences, with each one unique to its community and supported by basic amenities and services. These include dinosaur attractions, historic sites and museums, natural attractions, outdoor experiences, performing arts, and sport and recreation facilities, events and sites. The majority of the zone’s existing assets are fit for a local or regional visitor, but do not fully achieve what an international visitor might expect in terms of quality, amenities and accommodation.

Accommodation Supply



(Twenty31, 2022)

Travel Drumheller’s Destination Development Plan highlights locations for the construction of boutique accommodations in the downtown core. There is also a development plan being undertaken with the Badlands Amphitheatre, of which a key component will be building new accommodations at the site.

While these are positive developments, they represent an extremely small percentage of the number of rooms that will be required to facilitate a level of visitation aligned with the zone’s revenue targets. Increasing accommodation supply will be key to increasing overnight stays and the overall appeal of this TDZ.

Local business and operators include:

- Blackfoot Crossing Historical Park
- Rosebud Theatre and School of the Arts
- The Badlands Amphitheatre
- Barney’s Adventure Park
- Good Knights Medieval Encampment
- Valley Brewing
- Piston Broke Brewing

Provincial and national parks, historic sites and museums include:

- Dinosaur Provincial Park
- Midland Provincial Park
- Kinbrook Island Provincial Park
- Tillebrook Provincial Park
- Royal Tyrrell Museum
- Atlas Coal Mine National Historic Site

Provincially operated assets, including parks and museums within this TDZ, play an extremely important role in driving tourism to and within Alberta.

According to Travel Alberta’s anonymized data (2019), the most-visited destinations in the Canadian Badlands include:

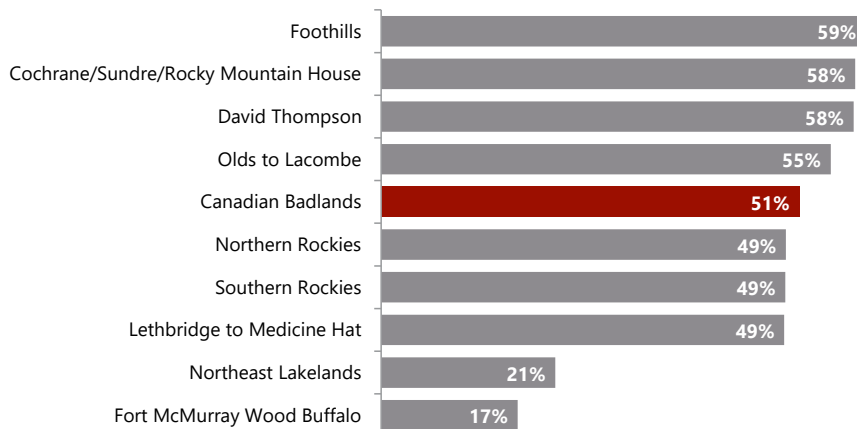
- Royal Tyrrell Museum
- Dinosaur Provincial Park
- Kinbrook Island Provincial Park

Demand: Amongst Albertans

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

- Nearly seven in 10 respondents have a positive impression of the Canadian Badlands
- Over half of respondents are familiar with the Canadian Badlands
- Dinosaur tourism tops the list of likely activities during a potential visit

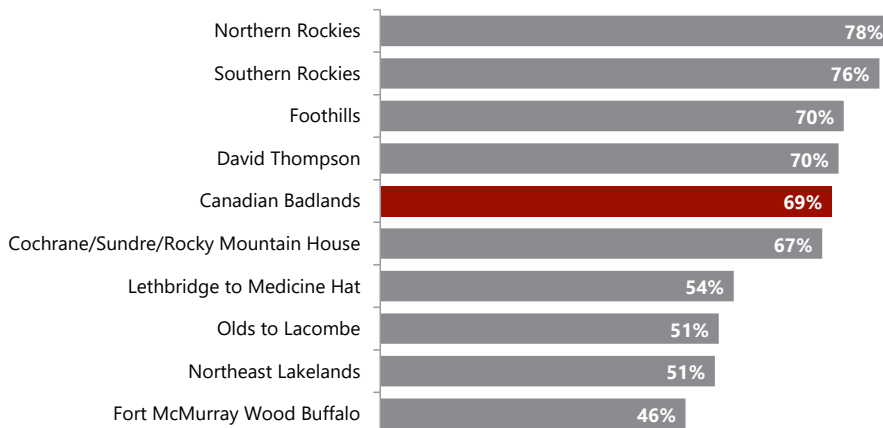
Familiarity with Destination (Per cent familiar with each TDZ)



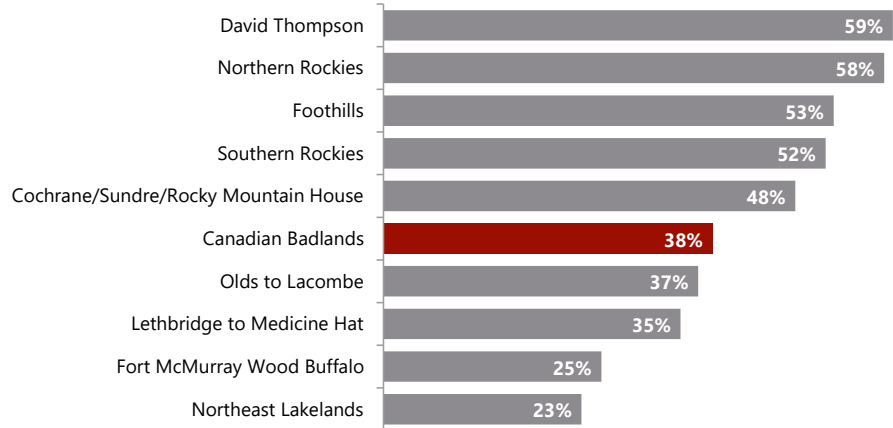
Only 38 per cent of respondents indicated they would be likely to travel to the Canadian Badlands in the next 12 months.



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)



Activities Albertans are most likely to enjoy in the Canadian Badlands TDZ

Hiking and camping are the activities Albertans are most likely to seek out in the Canadian Badlands.



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

Demand: International Travellers

While the zone's existing inventory of products and experiences that are valued by international visitors is minimal, the Canadian Badlands are well-positioned to attract — and capitalize on — an increase in tourism from international markets. There is an opportunity to create a host of top “trip anchors” (activities a visitor would centre their trips around) targeting visitors from the US and around the world. Immersive products, experiences, packages and itinerary options would all be valuable additions to this TDZ's suite of assets.

Natural attractions and historical/archeological/world heritage sites are the

Badlands trip anchors with the greatest short-term potential to be developed into immersive or extended experiences.

Natural attractions rank second as trip anchors favoured across all international markets (especially Japan and France). The Canadian Badlands' unique landscape, in which hoodoos and coulees combine with wide open skies and river access, provides visitors with views and experiences like no other in Canada. Currently, only two companies provide guided landscape tours within the zone. An expansion of guided tour offerings could entice visitors who are unaware of the Canadian Badlands' natural wonders.

Historical, archaeological or world heritage sites are the seventh most popular trip anchors worldwide. The Canadian Badlands is home to three extraordinary sites:

- **The Royal Tyrrell Museum of Palaeontology,**
- **Atlas Coal Mine National Historic Site**
- **Dinosaur Provincial Park (a UNESCO World Heritage Site)**

These signature assets already drive demand for international visitation to the Badlands.

(Source: 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.



Dinosaur Provincial Park

For Curious Adventurers, travel is about getting a different perspective on the world. Curious Adventurers will be drawn to the paleontological history of the Drumheller Valley and Dinosaur Provincial Park's UNESCO status. Immersive guided programs on geology, history, palaeontology and Indigenous studies would give visitors a more nuanced sense of the Badlands. There is also the opportunity to attract educational and international student travel to this zone.



Hoodoos Trail, Drumheller Valley

For Hotspot Hunters, travel is about achievement and accomplishments. They want to visit the top attractions, participate in unique experiences, and connect with local experts. These travellers are also likely to appreciate unique accommodations. Experiences for Hotspot Hunters should provide travellers with opportunities to earn a sense of accomplishment — for instance, by finding a dinosaur bone. Photography and social media content opportunities will allow for this audience to engage with the landscapes. Products should also support younger families in this group. Development of unique accommodation options would further support attracting these travellers to the zone.

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- and 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

This zone's historical, cultural and natural resources supply the fundamental assets necessary to provide immersive experiences unlike any of those available in peer destinations. Further product and experience development will better position the zone to take advantage of the opportunities inherent in its landscape, people and culture. This development can include, but is not limited to: soft adventure activities utilizing developed trail systems, river adventures, cultural experiences situated around the Badlands Amphitheatre and Rosebud Theatre, new dinosaur-themed experiences, and additional Indigenous experiences centred around Blackfoot Crossing.

Bucket list destinations now — not later

After cancelled trips and postponed celebrations, travellers are ready to make up for lost time and take that dream bucket list trip. 40 per cent of travellers are willing to treat themselves and spend more money than usual on their next trip.

Well-designed marketing strategies that create a sense of wonder and emphasize "can't miss" Badlands experiences will be key to reaching wider consumer segments willing to invest heavily in this destination.

Single destination, longer stay

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 directly with the strategic plans of several towns within the Badlands TDZ that are aiming to capitalize on existing visitors — either by making their stays longer or by initiating their return to the area. New immersive experiences and unique accommodations (especially in the Badlands' charming rural communities) will encourage visitors to stay longer.

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 Badlands offer immersive hiking and biking adventures through one of the province's most unique landscapes, while the Red Deer River provides recreational access for kayaking, canoeing and fishing. Destinations like these that offer something beyond a traditional "tourist" experience and communicate with adventurous travellers will build a strong, future-proof competitive advantage.

(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.

Generally, residents of the Canadian Badlands zone express positive sentiments regarding tourism and tourism development.

Residents of the Canadian Badlands, like residents of other rural destinations across the province, have an interest in welcoming more visitors to their community. The importance of tourism to their community and local economy is well understood and most residents believe that tourism improves quality of life within the zone.

Residents recognize the importance of tourism to their communities but acknowledge a lack of remarkable experiences for visitors to enjoy.

Highlights: Resident Sentiment

QUESTIONS	TOTAL ALBERTA RESIDENTS	CANADIAN BADLANDS RESIDENTS
How important is tourism to your community	70%	83%
I would welcome more visitors to my community	62%	83%
A strong tourism industry improved my quality of life	61%	77%
My community offers remarkable experiences to visitors	64%	55%
This is a vibrant community and area — there is always lots to see and do	70%	69%

(Source: Stone Olafson, 2023)



CHALLENGES AND OPPORTUNITIES ANALYSIS

Using findings from primary and secondary research and extensive stakeholder engagement, the consulting team conducted a challenge and opportunities analysis to evaluate this TDZ. The analysis takes into consideration both the current and potential future drivers that will influence tourism within the zone.

Challenges

- There is a lack of diverse accommodation options (including luxury, alternative/unique, and business/convention accommodation) and year-round products and experiences for visitors to enjoy.
- Tourism-focused leadership is not unified across the TDZ, which means that no group is currently responsible for creating a common vision for the Canadian Badlands and aligning tourism stakeholders. Without a common vision, perceptions of the future of tourism in this zone reflect the realities of the currently disconnected tourism ecosystem.
- Tourism organizations across the TDZ, as well as local economic development agencies, tend to work in silos. Some communities outside of the Town of Drumheller forfeit the bulk of tourism responsibilities to Travel Drumheller, limiting the ability of the TDZ to grow and realize its diverse tourism potential.
- Many tourism businesses and TDZ community members continue to think of tourism as a seasonal, summer-focused industry. The busy summer season causes fatigue and a need for tourism businesses to take a break in the shoulder and winter seasons, which is a barrier to all-season viability of the zone.
- There are limited resources in this TDZ, which has a small tax base and competing interests for funding. As a result, tourism in the Canadian Badlands may not receive the level of support or attention necessary to realize its potential.
- Visitors perceive tourism in the Canadian Badlands to be primarily focused on Drumheller and dinosaurs.
- There is a lack of tourism infrastructure (such as public washrooms, parking, transportation options, electric vehicle charging stations, etc.) and a lack of digital infrastructure (such as broadband and connectivity) across the TDZ. The absence of this infrastructure is mostly due to development costs that are too high for individual communities to address on their own.

Opportunities

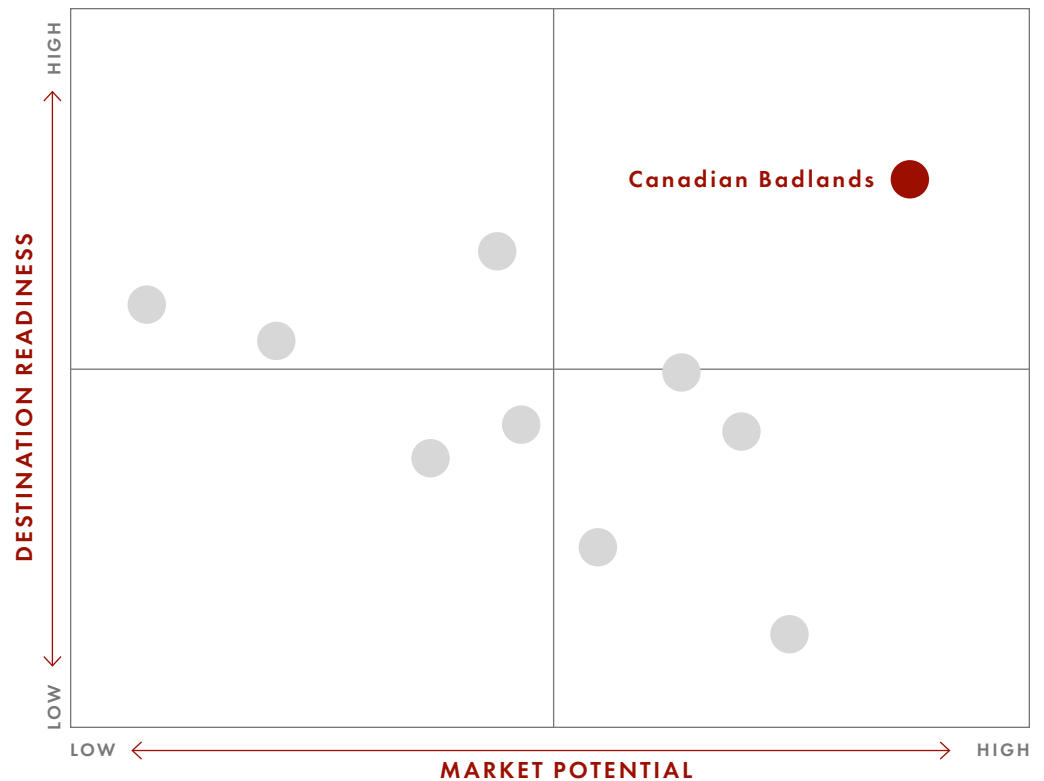
- The communities within the Canadian Badlands that do focus on tourism tend to think of it in terms of marketing and promotion. All communities in the zone could use support for destination management activities in alignment with the long-term vision and goals for the TDZ.
- Creating packages and trip itineraries for different target markets will make it easier and more enticing for visitors to choose the TDZ more often, stay longer and spend more.
- A tourism culture could be fostered in the Canadian Badlands by better communicating with the zone's communities regarding tourism's net benefits: a bolstered local economy, vibrant social life, and well-stewarded environment.
- Local DMOs and Travel Alberta should support the development of additional products and experiences to connect existing communities and tourism offerings throughout the Canadian Badlands.
- If elevated, provincial parks and natural attractions (and related tourism products and services) will contribute to the seasonal diversification of the zone's tourism offerings and provide compelling reasons for visitors to travel to the Canadian Badlands, stay longer, and spend more.
- The Canadian Badlands is ideally positioned (close to Calgary) and furnished (with unique natural features, parks and historic sites) to provide an alternative recreation destination to the Rockies.

DESTINATION MATURITY AND READINESS

The Canadian Badlands 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. Based upon all that was observed in this discovery phase, Travel Alberta assessed each TDZ on two primary criteria, i) market potential and ii) destination readiness to help inform the stages of future resource allocation for TDZs. To broaden our internal assessment, Travel Alberta will garner further input from stakeholders involved in the project to weigh into our initial assessment as indicated in matrix.

Key considerations pertaining to this zone include:

- The area benefits from ease of access from a major city and a unique landscape that has the potential to attract international visitors.
- Drumheller has one of the province's most popular museums, which already attracts a significant amount of visitation.
- While the fundamental natural assets exist, there are insufficient export-ready products, accommodations and experiences to drive international visitation and increase visitors' average length of stay.
- Communities outside of Drumheller have not fully embraced tourism, and all communities within the zone have competing sectors of priority.



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

05 VISION FOR THE FUTURE



Royal Tyrrell Museum, Drumheller

“To sustainably develop a destination zone enjoyed by both residents and visitors that offers remarkable products and experiences enjoyed in other iconic Alberta destinations.”

– Canadian Badlands TDZ Steering Committee

DESTINATION 2035

To visit the Canadian Badlands is to take an expedition into the extraordinary, where rolling prairies give way to prehistoric valleys, where rocky canyons conceal cowboy hangouts and where Indigenous culture is rich and thriving. Hike the hoodoo trails, cycle through canyons, follow in the footsteps of the area’s original residents and gallop on horseback through fields where the dinosaurs once roamed. This zone is full of opportunities for travellers to adventure freely or interact with curated experiences.

While an unprecedented level of commitment and cooperation will be required from communities, partners, and other stakeholders to address

foundational gaps and issues in its existing tourism ecosystem, the zone is primed for sustainable tourism growth and increased prosperity.

By 2035, the Canadian Badlands zone will be able to claim its share in tourism and become a competitive, viable and alternative destination in Alberta. In order to achieve this vision, stakeholders must maintain a collective focus on developing more immersive, diverse, inclusive, sustainable and highly sought-after experiences year-round (especially for the shoulder and winter seasons), as well as on developing more accommodations and other supporting amenities.

STRATEGIC INITIATIVES

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

01. Leveraging local economic development to secure investment in products and experiences that attract high-value travellers
02. Increasing accommodations in the zone, focusing on accommodations that meet the expectations of high-value travellers
03. Increasing the zone’s overall product offerings year-round
04. Identifying and supporting the development of packages, itineraries, and experiences unique to the Canadian Badlands
- 05.

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 Canadian Badlands 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.



Dinosaur Provincial Park

06 CONCLUSION AND NEXT STEPS

This report highlights that while many Albertans know the Canadian Badlands TDZ and have a favourable view of it, fewer are likely to travel there. The communities within the zone are open to developing their tourism assets if they align with their community-centric and sustainable goals.

To achieve its 2035 tourism objectives, the Canadian Badlands TDZ needs to attract new public and private investments. This will help enhance its current high-potential tourism assets, develop new assets, and overcome critical challenges in the zone. Current challenges include seasonality, a shortage of upscale and unique accommodation options, a limited range of products and experiences, and the perception among travellers that the zone is primarily for day trips. Addressing the more systemic issues, such as a shortage of available labour and housing, will take a concerted and collaborative approach among multiple organizations, including government, community and local industry.

Successfully implementing the strategic initiatives outlined in this report will unlock the zone's existing potential and create new regional growth and prosperity opportunities. The findings in this report will be used to establish the foundations for a sustainable, attractive, and economically viable destination.



Horseshoe Canyon



**CONTACT YOUR DESTINATION
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