

TOURISM DEVELOPMENT ZONE

Northern Rockies



DISCOVERY
REPORT
2023

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Front cover:
Nitehawk Bike Park, Grande Prairie

Sulphur Gates, Grande Cache

PREFACE

Alberta's Northern Rockies are known worldwide for their majestic high peaks, rugged beauty, river valleys and mountain lakes. The Northern Rockies Tourism Development Zone (TDZ) is Alberta's second-largest and most naturally diverse TDZ. This zone has many habitats, ranging from open foothills grasslands to dense forests, alpine meadows and glacier-fed rivers. While the area is known for its robust oil and gas and forestry industries, an expanded local tourism industry would present lucrative, regenerative opportunities to capitalize on some of Canada's best wildlife viewing sites, off-highway vehicle (OHV) routes, and hiking and biking trails. Strategic planning and investment could transform the Northern Rockies TDZ into a world-renowned outdoor enthusiast's haven — the place to experience Alberta's wild side.

This Destination Development Discovery Report for the Northern Rockies 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 Northern Rockies TDZ in order to capitalize on existing assets and catalyze future growth and prosperity
- Demonstrates that the growth and development of the visitor economy across the Northern Rockies TDZ will require a focused effort by the zone's stakeholders, communities and partners to chart a sustainable course forward

This Discovery Report informs and identifies specific actions Travel Alberta, the Government of Alberta and communities within the Northern Rockies 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.



Art Gallery of Grande Prairie

03 INTRODUCTION



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 Northern Rockies 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 Treaty 6 and 8, including the Cree, Dene, Blackfoot, Saulteaux, and Nakota Sioux homelands. We also acknowledge members of the Grande Prairie Métis District, Jasper House Métis District, and Lac Ste. Anne Métis District within the homeland of Métis and the Otipemisiwak Métis Government, as well as the Rocky Mountain Métis, and Indigenous Peoples living in urban areas throughout the Northern Rockies. 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, gave their time and shared their knowledge with us in the creation of this Discovery Report.

Please note, Indigenous engagement is currently underway.

- **Riane Allen**, economic development assistant, Town of Whitecourt
- **Renee Charbonneau**, executive director, Canadian Motorcycle Tourism Association
- **Natalie Charlton**, executive director, Hinton and District Chamber of Commerce
- **Jenny Daubert**, tourism officer, Municipal District of Greenview
- **Jax Drew**, Hinton Local
- **Rhonda Hough**, economic development officer, Town of Whitecourt
- **Brian Grant**, CEO, Grande Prairie Airport
- **Gina Goldie**, owner/operator, Wild Blue Yonder Rafting Adventures
- **Karna Gernsheid**, executive director – Grande Prairie Regional Sport Connection
- **Ken Loudon**, executive director, Grande Prairie Regional Tourism
- **Garry McDonald**, representative, Aseniwuche Winewak Nation
- **Sandi Neville**, general manager, Stanford Inn and Suites; president, Grande Prairie Regional Tourism Association
- **Bert Roach**, economic development officer, Woodlands County
- **Linden Roberts**, executive director, Philip J. Currie Dinosaur Museum

COMMITMENT TO SUSTAINABILITY & REGENERATIVE TOURISM

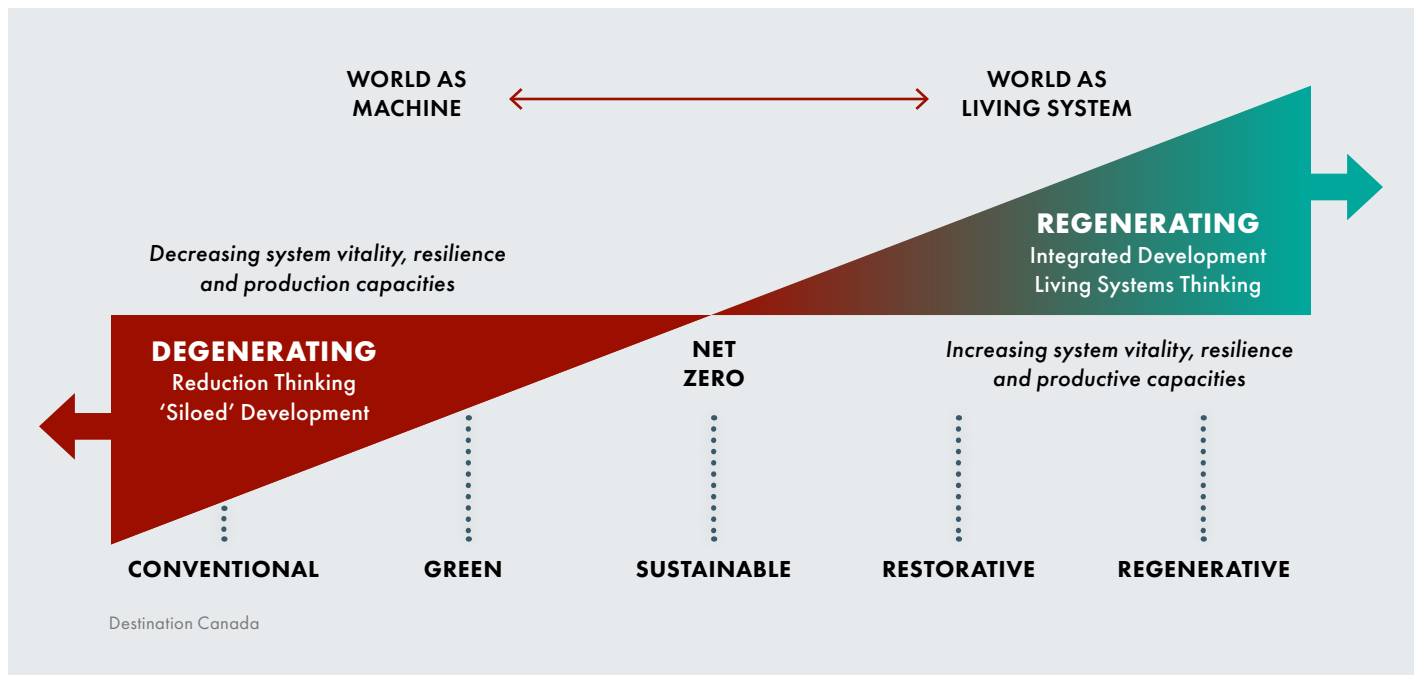
Tourism is a key economic sector in Alberta with strong potential to diversify the economy, create jobs, grow Indigenous tourism businesses, bring the “taste of place” to our guests’ tables and build vibrant communities. It also allows us to preserve and share culture and history, maintain or enhance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



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 Northern Rockies TDZ work together to address the most relevant inter-related elements:



(Adapted from Failte Ireland)

METHODOLOGY

Travel Alberta partnered with consulting firm Legacy Tourism 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 stakeholders and communities in the zone, determine their vision for the future growth of the local visitor economy and identify action steps toward the design of a DDP for the Northern Rockies TDZ.

In the **“discovery and destination profiling”** phase, Travel Alberta worked with the consulting team to access research material, build a steering committee (including local operators and government representatives), 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, and goals; facilitated planning sessions; and conducted in-depth community assessments within the Northern Rockies TDZ. These assessments included visits to three key communities (Grande Prairie, Grande Cache, Hinton/Yellowhead County), visits to proposed investment sites, and 48 meetings and engagement sessions with over 200 industry partners and local government representatives.



Kleskun Hill Campground, Grande Prairie

04 STAKEHOLDER ENGAGEMENT



Refuge Bay, Cherhill
@mikesugianto and @elijahpclarke

205

Stakeholders

28

Businesses

5

Communities

WHAT WE HEARD

In order to gain a comprehensive understanding of the Northern Rockies 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 zone's communities are interested in working together to develop itineraries.
- This zone could become an alternative destination to Jasper National Park and a solution to address the park's compression challenges.
- Improved infrastructure, including wayfinding signage, would lead to a better and safer visitor experience.
- Transportation into the zone without either a personal vehicle or a rental vehicle is challenging. There are minimal public transportation options, and the destination is several hours outside Edmonton. More transportation options would make the area more accessible for international visitors.
- There is an opportunity to expand agritourism experiences in this zone, building upon the area's already strong agricultural roots.
- Communities and other stakeholders are interested in elevating rodeo experiences across the region. The Northern Rockies is home to some of Alberta's oldest traditional rodeos. There is an opportunity to build a rodeo circuit and create more awareness of the experiences visitors can seek out at an Alberta rodeo.
- While there is a zone-wide gap in accommodations, products and experiences to support leisure visitation, some communities are interested in developing and marketing new experiences.
- Many in the zone want to further explore whether there is an opportunity to capitalize on American travellers heading north to Alaska.
- While already accessible, the Sulphur River, Muskeg River and Kakwa River systems could be better developed for visitor experiences (for instance, by improving access to potential tourist draws like Sulphur Gates).
- In order for the tourism sector to grow, communities within the zone need to prioritize and offer strong support for increased and diversified visitation.

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

05 INDIGENOUS ENGAGEMENT



Warrior Women, Jasper National 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.

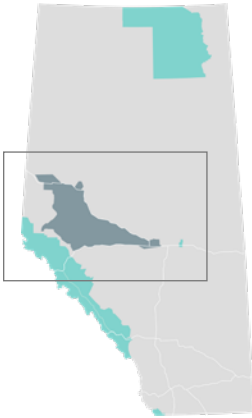
Suzanne Denbak
principle and founder
Cadence Strategies

05 DISCOVERING THE DESTINATION



Wild Blue Yonder White Water Rafting, Grande Cache

NORTHERN ROCKIES



By land mass, the Northern Rockies TDZ is the second largest TDZ in the province. As this zone is situated northwest of Edmonton and parallels highways 16, 40 and 43. It includes the communities of Grande Prairie, Grande Cache, Hinton, Edson, Whitecourt, and many other smaller communities and hamlets.

The Northern Rockies TDZ combines urban feel, rural charm and western heritage with outdoor adventures in the unmatched natural diversity of the Rocky Mountain, Foothills, Boreal and Parkland regions. With over 40 provincial parks, the zone is known for its combination of scenic farmlands, parklands and mountain terrain, offering experiences ranging from hiking and skiing to agritourism and Indigenous cultural activities. These natural assets combine with excellent sporting facilities, an amazing range of iconic events, festivals, museums, and other cultural attractions, offer something for everyone.

Hinton, located on Highway 16, is the nearest gateway community to Jasper. Thanks to its emerging DMO, and a local airport with the potential to serve regional and international airlines, the community is well-positioned to become a hub for tourism. The visitor economy in Hinton also has the support of municipal officials, who would like to see the community transition from extractive industries to tourism.

Immersion in nature

Opportunities for hiking abound across the zone, offering travelers the chance to immerse themselves in diverse natural environments, from mountains to foothills to prairies.

Soft adventure

Trails are among the zone's most significant tourism assets. Visitors already come to the Northern Rockies to hike, bike, snowmobile and drive OHVs. Nitehawk Year-Round Adventure Park offers trails for mountain biking and trail racing in the summer. While trail tourism holds much potential, there is, at present, little being offered beyond self-guided experiences. Monetization of trail assets will require guided options for hiking and biking along with locations to support servicing of a bike. Additionally, accommodation providers will need to be engaged so bike friendly accommodation may be offered across the region.

Dinosaur tourism

Dinosaur tourism represents a great opportunity for this zone and can be a primary trip anchor driving visitation to the area. The zone is home to nationally and internationally recognized fossil beds, including Pipestone Bonebed, one of densest fossil sites in the world. The Philip J. Currie Dinosaur Museum — an under-explored, best-in-class dinosaur museum — offers innovative experiences and hosts the annual Palaeo Palooza festival. Finally, Grande Cache is

home to the only large-scale exposure of dinosaur tracks in Canada.

Arts and culture

Grande Prairie is home to western Canada's second-largest public admission art gallery, the Art Gallery of Grande Prairie. The surrounding TDZ plays host to several annual events, including the Grande Prairie Winter Festival, Bear Creek Folk Festival, Grande Prairie Stompede and Paleo Palooza.

Agritourism

The Northern Rockies TDZ has the potential to become known for unique agritourism experiences. Home to some of Alberta's oldest rodeos, the zone already hosts agricultural events, including professional rodeo events at the Teepee Creek Rodeo. Other agritourism operators including Broken Tine Orchard and Evergreen Park have expressed strong interest in developing new and complementary agritourism experiences.

Regenerative Tourism Opportunity

The soon to be reclaimed Cardinal River Coal Mine, located south of Hinton on Highway 40, provides a unique development opportunity. As part of the planning process, Legacy Tourism completed a feasibility study for a conceptual high end, wildlife viewing facility. This reclamation project represents an opportunity for Travel Alberta and stakeholders to engage in this important tourism space.



DEMOGRAPHICS AND POPULATION

This TDZ, comprised of Hinton, Edson, Grande Cache, Grande Prairie, Grande Prairie County, Wembley, Whitecourt, the Municipal District of Greenview and Yellowhead County, has a population of over 143,715. Grande Prairie is the largest service centre in the zone, home to just over 67,000. Hinton has the second-highest population, with just over 10,000. Across the zone, a growing, relatively young population provides both a solid labour force and a strong local consumer base for tourism operators.

143,715

POPULATION

14,955

INDIGENOUS POPULATION

7.71%

POPULATION GROWTH
OVER PAST 10 YEARS

11.7%

UNEMPLOYMENT RATE

\$120,861

MEDIAN FAMILY INCOME

(Alberta Regional Dashboard, 2023)

ECONOMIC PROFILE

The Northern Rockies is supported by three key industries: energy, forestry and agriculture. These primary industries drive activity across the zone and are the zone's top employers. Several chemicals, pipelines and power generation projects have been proposed or are being planned for Greenview County.

6,915

BUSINESSES

96.7%

SMALL BUSINESSES

\$14.5M

MAJOR PROJECTS

(Alberta Major Projects, 2023; The City of Grande Prairie, 2020)

ACCESS

The Northern Rockies TDZ is situated northwest of Edmonton. The zone is accessible primarily by highway, with limited air access, excluding the Grande Prairie Regional Airport. The TDZ provides a vital link for visitors looking to travel further into the Northern Rockies, and serves the residents of the City of Grande Prairie, County of Grande Prairie, Municipal District of Greenview and the Peace Country. The existing rail network within the zone is currently used for commercial and freight purposes.

Access overall has been a significant challenge for this zone, but most notably for international visitors.

POLICY AND PLANNING CONSIDERATIONS

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

- Approximately 80 per cent of the land in this zone is Crown land, with approximately 79 per cent managed as public land, and the remaining one per cent is managed as parks.
- Much of this public land is subject to industrial disposition for oil and gas, coal, sand, and gravel extraction and subject to forest management agreements.
- There are many opportunities to develop infrastructure and amenities such as private backcountry lodges, resorts, hiking/biking trails and guided river trails in the areas outside of Jasper National Park.
- Off Highway Vehicle (OHV) development and activities would best be undertaken in the Wapiti Dunes, adjacent to Grande Prairie. Facilitating OHV activities is identified as a primary objective in the Bear River-Wapiti Local Integrated Resource Plan and the Government of Alberta's Wapiti Sand Dunes land use zones.
- Tourism development (including agritourism development) is in direct competition for land use with the agricultural sector, as well as other resource sectors that may or may not be compatible with tourism.
- The Eastern Slopes Policy identifies that recreation and tourism is one of the overriding land use objectives in the region; however, lands zoned in the policy as "General Recreation" do not necessarily reflect the areas with the highest tourism potential.
- Provincial parks and recreation areas in the zone hold potential for tourism development, but Alberta Parks will need to enable and proactively pursue private sector investment in order for this development to happen.
- Existing trail networks across the zone are not formally recognized. Most are not designated under the Alberta Trails Act, limiting further development and protection under other resource land use initiatives.
- While existing tourism nodes have been identified across the Northern Rockies zone, these nodes unfortunately do not represent the areas of greatest potential for higher-yield and lower-volume tourism product development.
- Municipal Development Plan (MDP) direction regarding tourism rarely includes specific directions to enable and support the development of higher-yield market- and export-ready products, sports tourism, as well as business and convention hosting infrastructure.



Obed Lake Provincial Park, Hinton
Jon Sinclair @sinclair_photo

DESTINATION ECOSYSTEM

Destination Marketing/Management Organizations (DMOs)

This zone has three main DMOs: Grande Prairie Regional Tourism Association (GPRTA), Hinton and District Chamber of Commerce/Explore Alberta, and Northern Rockies & Wild Alberta. These three organizations work independently of one another and represent different towns and municipalities.

GPRTA, the most prominent DMO in the zone, is a non-profit marketing organization funded by municipal partners, memberships, marketing programs and fundraising initiatives. It is dedicated to increasing local business revenue by promoting the Grande Prairie area and continually seeking opportunities to showcase the region. GPRTA has started to explore tourism development but is primarily focused on marketing.

Members of the Hinton & District Chamber of Commerce have established an advisory group — Explore Alberta Northern Rockies (EANR) —

tasked with creating a destination development organization for Hinton and the surrounding region. EANR is currently funded through the Town of Hinton. Moving forward, the group will look to implement a destination marketing fund in partnership with local hoteliers.

Wild Alberta is a regional economic development alliance in north central Alberta established by Growth Alberta. This committee is focused on creating awareness of North Central Alberta and attracting tourists from the greater Edmonton area.

Tourism Jasper is the DMO for Jasper. While Jasper is not within the current boundary of the Northern Rockies TDZ, ongoing collaboration between Jasper and the Town of Hinton will be critical for the successful expansion of Hinton's visitor economy.

Economic Development Organizations

Invest Grande Prairie is the organization responsible for attracting investment and events in support of Grande Prairie's nine key sectors. On the tourism side, Invest Grande Prairie focuses on bringing major regional, national and international sporting events to Grande Prairie.

The Municipal District of Greenview is responsible for the economic development of the district, which includes Grande Cache. The current Municipal Development Plan for the MD of Greenview indicates that Greenview supports agritourism and ecotourism as a means to diversify the municipal economy. An opportunity within the MD of Greenview is trail development. The MD published a plan in 2022 titled, "A Vision for Trails on Public Lands."

Both Woodlands County and the Town of Whitecourt have economic development teams dedicated to supporting businesses starting up in or moving into their jurisdictions. Both economic development teams acknowledge tourism as an economic diversifier.

VISITATION

According to Travel Alberta's anonymized mobile data, in 2019, 97.6 per cent of visitors to this zone were from Canada, while 2.1 per cent hailed from the United States. Visitation to the zone is overwhelmingly domestic, with out-of-zone visitors coming mainly from Edmonton and Calgary (British Columbia accounts for just three per cent of visitors).

AB

VISITOR ORIGIN

Like visitation to Alberta as a whole, visitation to the Northern Rockies is highly domestic, with the vast majority of visitors coming from Spruce Grove (24.3 per cent), Edmonton (29.1 per cent) and Calgary (four per cent).

48.1%

REPEAT VISITORS

Just over 48 per cent of visitors to the Northern Rockies TDZ visit two or more times per year.

33 hours

AVERAGE LENGTH OF STAY

On average, visitors spend just over 33 hours in this zone.

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.

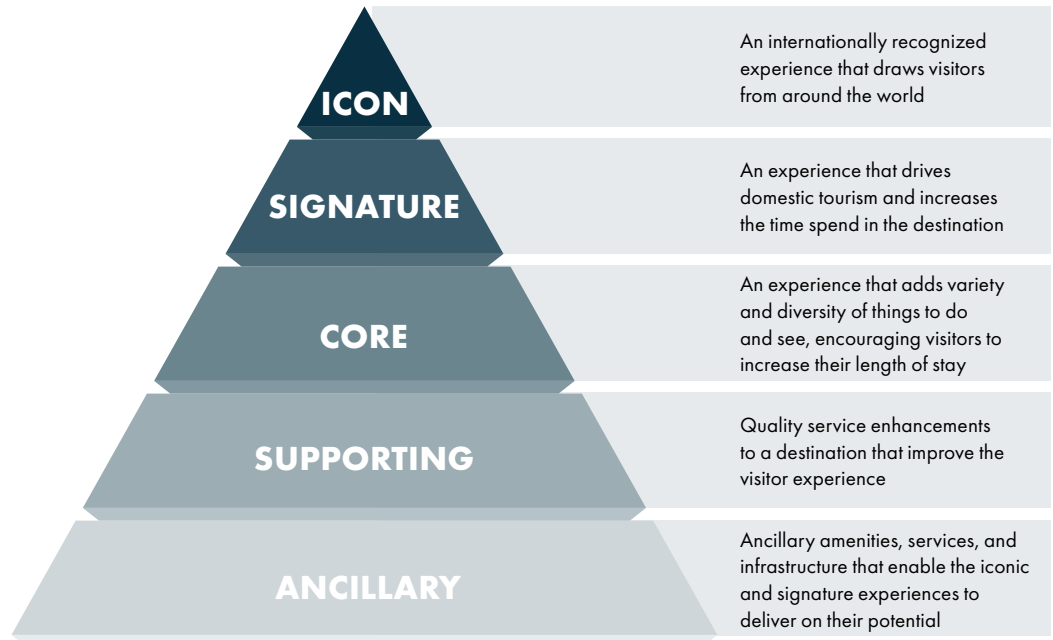
(Source: Near Mobile Data, 2019)

05 DESTINATION ANALYSIS



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)

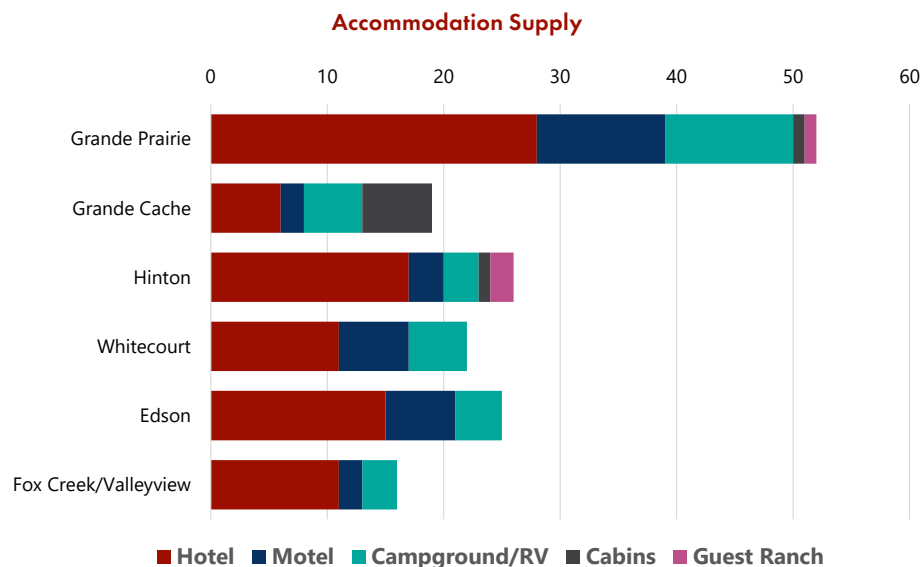
Most of the products in the Northern Rockies TDZ don't have a leisure travel focus. A large portion of products and services, focused along Highway 43, primarily serves the region's extractive industries (oil and gas and forestry) that operate across the zone. The evolution of the tourism sector in the Northern Rockies TDZ will require investors, owners, and operators of these products and services to shift their focus from heavy industry customers to leisure travellers. Meanwhile, the supporting, core and signature products to attract these leisure travellers will also need to be developed in communities like Grande Prairie, Grande Cache and Hinton.



Philip J. Currie Dinosaur Museum, Wapiti River Valley

Supply: Accommodation Mix

Accommodations in the Northern Rockies TDZ are comprised of a mix of hotels and motels focused on boarding industrial crews, and campgrounds that host both industrial crews and traveling families. Lower-quality service accommodations are prevalent along the zone's major highways. Tourism growth will not occur without the construction of accommodations suitable for leisure visitors and development of the supporting supply of products and experiences.



(Source: Northern Rockies Asset Inventory, Year 2022)

Key findings regarding the accommodation mix in this zone include:

- While the construction of smaller, boutique accommodations should be pursued in the zone, there is also an opportunity to explore the feasibility of repurposing existing properties that currently serve industrial crews to better serve leisure travellers.
- Many of the zone's campgrounds are isolated or disconnected from the zone's most popular trail networks and nature-based, adventure and ecotourism attractions.
- There are currently few opportunities for higher-yield comfort camping and few higher-end campgrounds/RV facilities in the zone.

Supply: Products and Experiences

An asset inventory, provided by Travel Alberta, conducted at the start of the TDZ planning process identified just under 400 assets. Included in this number are those assets such as restaurants, malls, retail and other resident focused services. Across the zone, the supply and diversity of market-ready and export-ready tourism products and experiences are limited.

To better understand how to move forward with product development in the zone, an inventory of all available tourism products and services, along with the development stage, should be undertaken. A comprehensive understanding of what is currently available in the zone will be key in supporting current tourism operators and making decisions about the types of experiences that may be considered part of future development.

Local operators include:

- Latitude 55
- Philip J. Currie Dinosaur Museum
- Grant Berg Gallery
- Art Gallery of Grande Prairie
- Nitehawk Year Round Adventure Par
- Wild Blue Yonder Adventures
- Elevation Sled Dogs
- Open Road Adventures
- Refuge Bay Glamping
- Wild Woods Conservation and Education Centre
- Overlander Mountain Lodge
- Northhaven Retreat Centre
- Folding Mountain Brewery
- Jasper East Cabins

Provincial parks and protected areas:

- Willmore Wilderness Area
- Obed Lake Provincial Park
- Pipestone Creek Provincial Park
- Saskatoon Island Provincial Park
- Pembina River
- Sulphur Gates Provincial Recreation Area
- Smoky River South Provincial Recreation Area
- Kleskun Hills Natural Area
- Musreau Lake Provincial Recreation Area
- William A. Switzer Provincial Park

According to Travel Alberta's anonymized mobile data (2019), the most-visited tourism destinations in the Northern Rockies include:

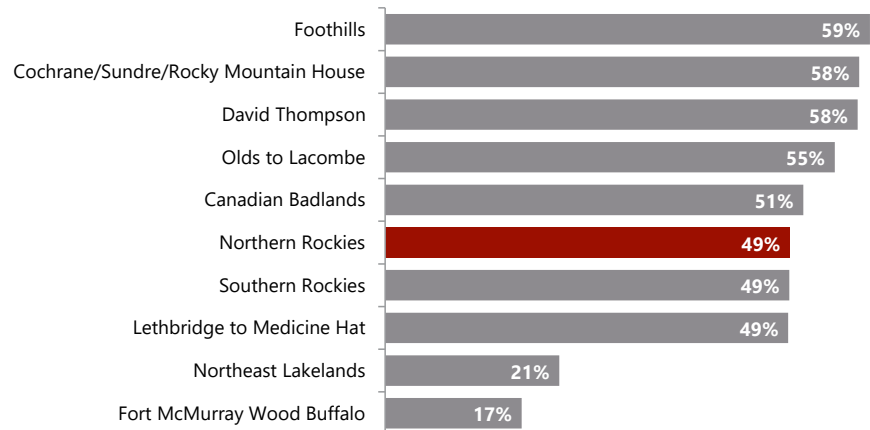
- **Muskoseepi Park**
- **William A. Switzer Provincial Park**
- **Nitehawk Year Round Adventure Park**
- **Folding Mountain Brewery**

Demand: Amongst Albertans

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

- Respondents have a generally positive perception of the Northern Rockies
- While potential travellers have an extremely positive impression of the Northern Rockies, just a little over half are likely to visit in the future

Familiarity with Destination (Per cent familiar with each TDZ)

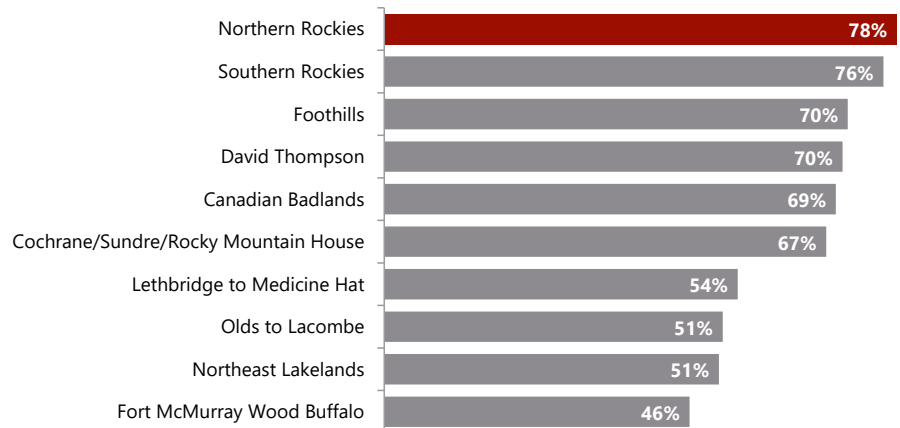


More travellers envision a longer stay in the Northern Rockies, and name hiking as the activity they're most likely to seek out in the zone.



Grain Bin Brewing Company, Grande Prairie
SkiNorthAB / Paul Lavoie

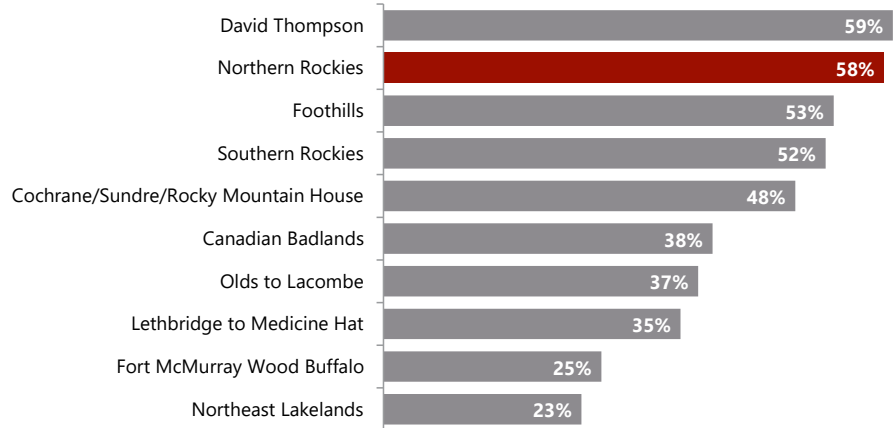
Overall Impression of Destination (Per cent with positive overall impression of each TDZ)



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

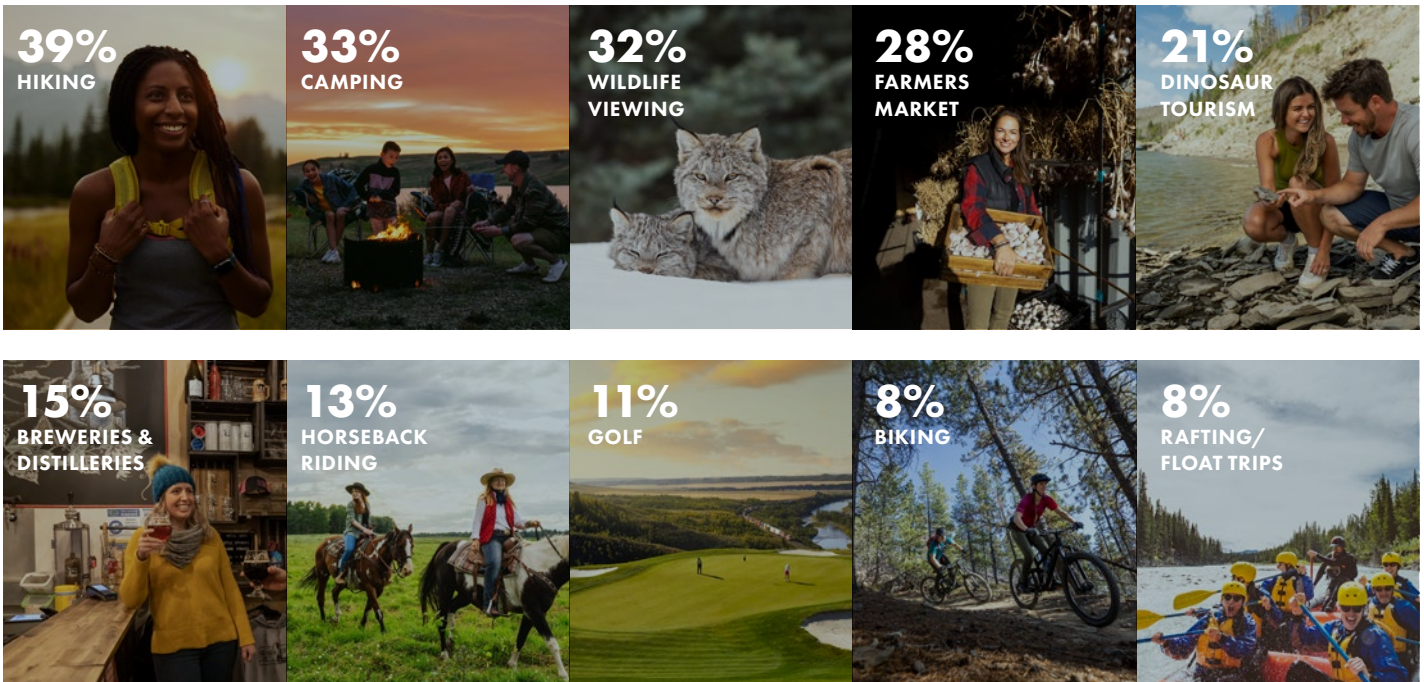
58%
 MOST LIKELY TO VISIT
 BETWEEN JUNE AND AUGUST

46%
 LIKELY TO STAY BETWEEN
 THREE TO FOUR NIGHTS



Activities Albertans are most likely to enjoy in the Northern Rockies TDZ

Hiking and camping are the activities Albertans are most likely to seek out in the Northern Rockies.



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

Demand: International Travellers

Top trip anchors, which are those activities a visitor would centre their trips around, and supporting activities identified by recent market demand studies align well with tourism products and experiences and natural assets in the Northern Rockies TDZ.

For international and U.S. visitors, top trip anchors represented in the Northern Rockies zone include:

- Natural attractions like mountains and waterfalls
- Hiking or walking in nature
- Northern Lights
- Camping

Among U.S. travelers, wildlife viewing and bear watching were among the top trip anchor activities trending between 2019 and 2020. Ensuring the availability of products and services that lend themselves to these activities will be a priority within the zone.

(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.



Jarvis Lake, William A. Switzer Provincial Park, Hinton SkiNorthAB / Paul Lavoie

Travel Alberta's perception research indicates that the Northern Rockies TDZ appeals to Curious Adventurers, for whom travel is about getting a different perspective on the world. The zone offers Curious Adventurers opportunities to explore remote locations, participate in self-guided recreational activities, learn about the province's rich paleontological history at the Philip J. Currie Dinosaur Museum or experience some of Alberta's oldest rodeos.



Athabasca Lookout, William A. Switzer Provincial Park, Hinton SkiNorthAB / Paul Lavoie

Overall, the TDZ offers very few anchor attractions that would have significant appeal to Hotspot Hunters. It will be important to ensure that the new products and experiences developed over the next 10 years have the potential to appeal to both Curious Adventurers and Hotspot Hunters.

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:**Bucket list destinations now — not later****DESCRIPTION:**

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.

KEY TAKEAWAY FOR TDZ

The Northern Rockies zone's proximity to one of Canada's most significant national parks provides an opportunity to capture those visitors with "Canadian Rockies" on their bucket lists. While tourism experiences in the Northern Rockies are currently limited, there are several opportunities to develop experiences to meet this traveller's needs and give them the chance to cross a major item off their list. Investors, planners and other stakeholders would do well to focus on securing access to the dinosaur tracks in the Grande Cache area and transforming Hinton into a tourism hub and gateway for travellers to the Rocky Mountains.

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.

In the Northern Rockies and across the province, a shortage of tourism labour will continue to be a challenge, as the hospitality sector competes with high-paying jobs in oil and gas, agriculture, and coal extraction.

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 Northern Rockies zone's diversity of landscapes, extensive trail systems, and rare cultural experiences have the potential to appeal to younger travellers drawn by the area's proximity to Jasper. Investors, planners, and business owners have the opportunity to attract new visitors by developing or enhancing products that invite younger travellers to explore the "wild side" of Alberta.

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.

For the most part, the Northern Rockies TDZ is either a destination visitors encounter on their way to somewhere or have come for a purpose, such as retail, medical or services beside tourism. Work with non-tourism partners to promote festival, events and other experiences in the area would encourage visitors to the zone to stay longer and spend more is key to building up the visitor economy.

In Grande Prairie, one of the goals included in the GPRTA's Strategic Destination Plan is increasing visitor length of stay. This could be achieved by leveraging COSTCO, Canadian Tire, car dealerships in Grande Prairie and presenting experiences or events encouraging retail tourists to stay longer. Other communities across the zone are working to find their own visitation drivers.

(Legacy Tourism, 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 Northern Rockies:

- Do not view tourism as important to their communities but recognize its important role in diversifying local economies
- Are interested in seeing more visitors in their communities
- Do not feel well informed about the tourism sector and its impact on communities

In moving forward, it will be essential to work with all regional municipal partners to understand how tourism fits into their growth plans and continue to demonstrate how tourism can benefit their communities.

Highlights: Resident Sentiment

QUESTIONS	TOTAL ALBERTA RESIDENTS	NORTHERN ROCKIES RESIDENTS
How important is the tourism industry to your community?	70%	59%
A strong tourism industry improves my quality of life.	61%	65%
A strong tourism industry is good for my community.	84%	81%
Tourism is important to economic diversity.	88%	91%
Tourism encourages investment in the local economy.	86%	85%
I would welcome more visitors to my community.	62%	74%
This is a vibrant community and area – there is always lots to see and do.	70%	74%
My community and area offer experiences I want to tell others about.	65%	71%
How informed do you consider yourself to be about tourism sector and its impact on your community?	51%	38%

(Source: Stone Olafson, 2023)

SWOT ANALYSIS

Using primary and secondary research findings and extensive stakeholder engagement, Legacy Tourism conducted a strengths, weaknesses, opportunities and threats (SWOT) analysis to evaluate the Northern Rockies TDZ. The analysis considers both the current and potential future drivers that will influence tourism within the zone.

Strengths

- The zone's position along the Alaska Highway system (the "Gateway to the North") and its proximity to Edmonton
- The Jasper-Hinton Airport's existing infrastructure to connect visitors to the zone
- Spectacular and diverse landscapes — from mountains to foothills to boreal forest, with extensive biking and hiking trails and an accessible river system that can be better developed as a connected water route
- Rich heritage, including diverse Indigenous communities
- The zone's role as a retail hub for northern British Columbia, northern Alberta and the Northwest Territories
- Grande Prairie's capacity and experience hosting business meetings, conventions and other events — Grande Prairie is home to Evergreen Park, the largest full-featured exhibition and event facility north of Edmonton
- Internationally and nationally significant dinosaur bonebeds and track sites — the Northern Rockies zone is the "Land of the Dinosaur," where you can have hands-on experiences
- A permissive regulatory environment for motorized recreation compared to some other areas of the province
- Trails tourism planning already initiated for some of the zone's trail networks with the highest potential for increased tourism (Wapiti, Grande Cache)
- Unique provincial parks (Willmore, Sundance, William Switzer) with relatively low visitation that offer many of the same opportunities, more affordably, and without the congestion and regulatory restrictions visitors encounter in national parks

Weaknesses

- Outsider perception that the zone is economically driven by oil and gas and forestry
- Limited supply and diversity of market- and export-ready tourism products, services and experiences, including accommodation options and guide services that are directly connected to the zone's major assets
- Lack of "anchor infrastructure/experience" in the zone
- The planning and permitting process for tourism development on Crown lands is under-prioritized, uncertain and very difficult for operators
- Insufficient Crown land earmarked for tourism development (Crown land has been identified along Highway 16 but not along Highway 40, where significant opportunity exists)
- Lack of appropriate roads in the backcountry to support higher-yield backcountry tourism
- Limited transportation options for guests travelling from Jasper or Edmonton
- Road infrastructure is in need of upgrading (pullouts, washrooms, interpretive sites, EV charging stations, etc.)
- Lack of purposefully planned, developed and managed signature trails and outdoor recreation amenities (many trails are vestigial industrial access routes or are worn in)
- Unreliable cellular and internet connectivity
- Lack of access to capital for tourism projects

Opportunities

- Undertake necessary municipal planning to attract investment in the Yellowhead tourism development nodes
- Ensure municipalities are recognizing tourism in land use plans and undertaking area structure planning and appropriate infrastructure planning to enable and support tourism development in those areas
- Partner with Edmonton International Airport to strengthen air access into Grande Prairie and the Hinton-Jasper Airport
- Diversify accommodation supply to include market-ready, export-ready and higher-yield comfort camping sites, huts and boutique resorts
- Create high-yield experiential paleontological experiences, especially at the Philip J. Currie Museum and at the Grande Cache track site
- Create high-yield, higher quality signature motorized and non-motorized trail experiences
- Create multi-day signature water route experiences (Athabasca, Smoky, Wapiti, McLeod River)
- Take advantage of geothermal environments in Hinton and Whitecourt (spas, wellness, winter tourism)
- Leverage Hinton's proximity to Jasper by developing more guided outdoor experiences
- Facilitate wildlife viewing at remediated Cardinal River mine site
- Develop new farm-to-table, agritourism and "behind the chutes" rodeo experiences

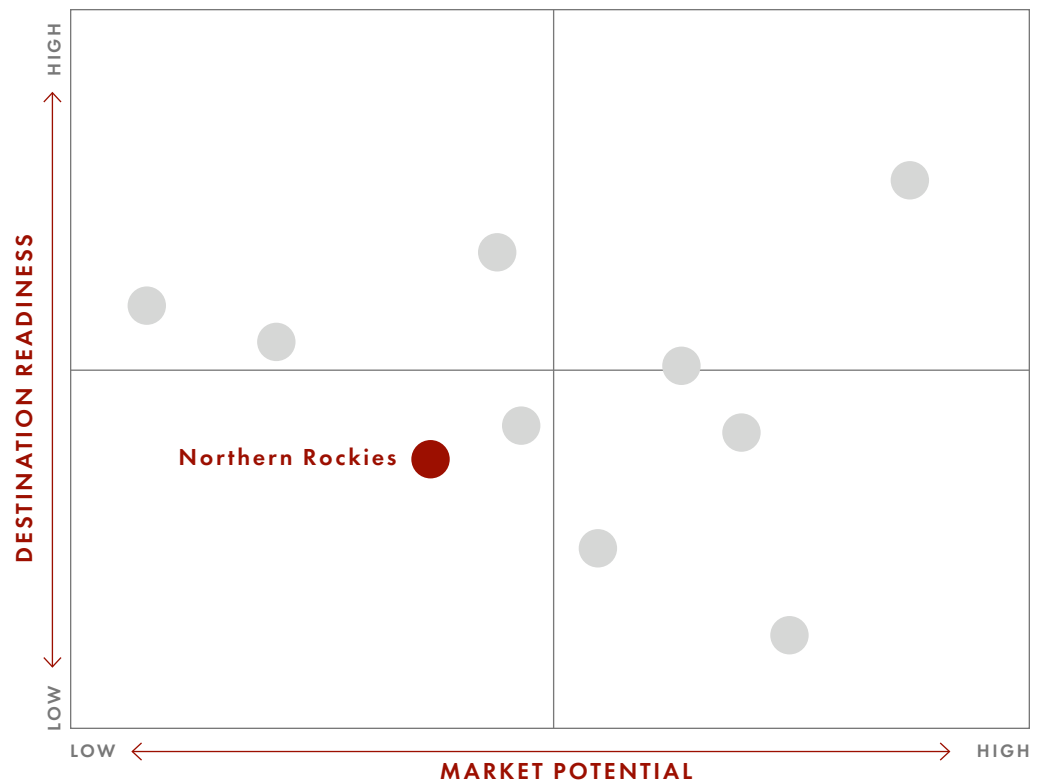
Threats

- Increasing labour shortage
- Distance from Alberta's major population centres and international airports
- Tourism is not recognized as a key industry in the zone — it needs to be actively supported and fostered like other resource-based sectors
- A siloed mindset in some stakeholders that may threaten the realization of a cohesive tourism corridor
- Increased strain on road infrastructure as the economy improves and the tourism industry becomes busier
- Volatility of the oil and gas economy
- Regions to the south attracting significant proportions of Northern Rockies' visitor source markets due to greater ease of access
- Inability to access Crown land or receive approvals to pursue tourism development in the areas of highest tourism potential
- Nature based and ecotourism development opportunities are not taken into consideration during Caribou and grizzly bear recovery planning efforts

DESTINATION MATURITY AND READINESS

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

- Only three of the eight communities in the TDZ directly address tourism as an opportunity in municipal planning documents. The remaining communities address tourism in a limited manner or not at all.
- DMO sustainability and capacity are challenges that negatively impact this zone's destination readiness.
- Currently, there is a significant lack of tourism-related products and experiences and leisure-focused accommodation to serve visitors.



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

05 VISION FOR THE FUTURE



U Bar Ranch, Grande Cache

“As Alberta’s corridor to and from the north, the Northern Rockies zone combines urban sophistication, rural charm, and rich origins with ready access to outdoor adventures in pristine prairie and wild mountain settings. Offering authentic experiences that visitors find exceptional, we will be known as one of Canada’s most diverse and sustainable tourism regions.”

– Northern Rockies TDZ steering committee

DESTINATION 2035

Alberta’s Northern Rockies are home to rolling hills of evergreen forests, prairie parklands, serene lakes and winding river valleys. The zone is full of potential for wilderness explorers, comfort campers and culture buffs alike. During the summer, rivers and lakes offer opportunities for once-in-a-lifetime voyages by kayak and canoe — and when the snow starts to fall, an entirely new collection of winter adventures invite visitors out to experience activities from ice fishing to snowshoeing. Local Indigenous cultures deepen visitors’ understanding of the zone’s people, history, and land, while significant historical sites and museums showcase the stories of early settlers and the fur trade.

By 2035, the Northern Rockies TDZ will be defined by distinctive visitor experiences and sustainable tourism focused on telling the story of the zone’s industrial development, local cultures and history — as well as on self-guided and guided outdoor opportunities, river and canyon experiences.

Paleontological tourism:

Various paleontology-focused experiences will be available across the zone, with diverse programming designed to capture the imagination of Curious Adventurers and Hotspot Hunters alike. The Northern Rockies TDZ will invite international fossil and dinosaur enthusiasts to enjoy one-of-a-kind, world-class experiences.

Trail-based tourism:

The zone’s numerous trails will be recognized by the Alberta Trails Act, thus allowing these resources to be protected and improved. Across the region, the benefits of trail-based activities will be realized by

development of user friendly communities, including supportive accommodation and support services, for snowmobiling (Whitecourt); mountain biking (Grande Cache/Whitecourt/Hinton); and back country hiking (Grande Cache and Hinton).

Grande Cache and Hinton and area as additional visitation driver:

The communities of Hinton and Grande Cache will transition focus from extractive industries to tourism and realize improved visitor access by road, with improvements to Highway 40, improved pull outs and rest areas, and regular air service to the zone via the Hinton – Jasper Airport.

A mix of experiences, including OHV, winter wellness (ice plunges) and mountain biking, will draw visitors to the zone. Working collaboratively with stakeholders based in the David Thompson TDZ, Hinton and surrounding area will provide diverse opportunities for visitors to experience more of the Rockies.

By 2035, there will be an increase in market-ready and export-ready tourism experiences and products — including dinosaur track tours and a high-end wildlife-viewing lodge — offered across the zone. The zone will have shifted from industry-centric accommodations to tourism-centric accommodations. The Northern Rockies will be a destination Hotspot Hunters have added to their bucket list.

STRATEGIC INITIATIVES

In support of tourism development within the Northern Rockies TDZ, multiple strategic initiatives were identified by local stakeholders and communities. These initiatives included:

01. Support existing Destination Management Organizations to be strong champions of the visitor economy growth across the region
02. Increase the overall product and experience offering across the zone, focusing on specific areas (dinosaur experiences) that Northern Rockies has a competitive advantage in
03. Increase full service, leisure-focused accommodations supply, including fixed-roof and camping options
04. Maintain and encourage resident sentiment in support of tourism, its positive impact on quality of life for residents and its positive impact on economic diversification
05. Position tourism as a driver of economic development with high-value tourism-related investments to municipal partners



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 Northern Rockies 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.



Muskoseepi Park, Grande Prairie

06 CONCLUSION AND NEXT STEPS

With a vast amount of provincial Crown land and proximity to Jasper National Park, the Northern Rockies TDZ represents a significant opportunity to develop a mix of tourism-related products that are complimentary to those offered in the park and appeal to the international traveller. As we develop this TDZ's tourism-related products and services, we must plan for future collaboration with the David Thompson TDZ, alongside which the Northern Rockies has the potential to be as popular a tourism draw as Jasper National Park is today.

In order for the Northern Rockies zone to realize this potential:

- New purchasable tourism experiences and accommodations must be created and developed
- Tourism must be more prominently represented in municipal and provincial policies and in the local and provincial regulatory environments
- Transportation and access, both to and within the zone, need to be upgraded and expanded
- Hinton and Grande Cache must realize their significant potential for tourism development
- Paleontological and nature-based experiences must be leveraged to create tourism offerings unique to this zone

Successful implementation of the strategic initiatives found in this report will both realize the zone's existing 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 ensure the foundations for sustainable and economically viable destinations are in place.



Philip J Currie Dinosaur Museum
Pipestone Creek, Wembley



**CONTACT YOUR DESTINATION
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