

TOURISM DEVELOPMENT ZONE

# Fort McMurray Wood Buffalo



**DISCOVERY  
REPORT  
2023**

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Front cover:  
Andrew Lake Lodge & Camps  
Northeast corner of Alberta

Andrew Lake Lodge & Camps  
Northeast corner of Alberta



# PREFACE

The Fort McMurray Wood Buffalo Tourism Development Zone (TDZ) in northern Alberta represents an enormous opportunity to develop world-class Indigenous, reliable non-ski winter and nature-based tourism experiences. It is also an opportunity to utilize tourism to diversify an economy that currently relies almost exclusively on resource-based industries. The right mix of products and experiences unique to this zone could draw high-value travellers and put Fort McMurray Wood Buffalo on the map for domestic and international visitors alike.

To achieve its full potential as a destination, the Fort McMurray Wood Buffalo TDZ requires an unprecedented commitment to prioritize tourism development. In order to build up a sustainable and prosperous local tourism industry, Indigenous and non-Indigenous communities, partners and other stakeholders must work together to create a seamless and attractive visitor experience, address foundational gaps in existing offerings, and overcome challenges.

Ultimately, the successful development of the Fort McMurray Wood Buffalo TDZ will result in increased tourism revenues and profits, improved resident quality of life, and the protection and maintenance of natural and cultural assets for future generations.

The following Fort McMurray Wood Buffalo Destination Discovery Report provides the necessary insight into developing this region into a viable tourism destination. This report:

- Highlights the tourism assets and experiences that hold the highest potential to attract high-value visitation from a broad cross-section of traveller segments
- Identifies specific initiatives to address current challenges facing the TDZ
- Identifies ways that tourism can be used as a mechanism for economic diversification
- Builds a strong business case for investment within the Fort McMurray Wood Buffalo TDZ

**This Discovery Report informs and identifies specific actions Travel Alberta, the Government of Alberta and communities within the Fort McMurray Wood Buffalo 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.**





# 03 INTRODUCTION



Lookout near Fort McMurray



## 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 Fort McMurray Wood Buffalo 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 8 signatories, including the Cree and Dene homelands. We also acknowledge members of the Fort Chipewyan Métis District, Fort McMurray Métis District, Conklin Métis District, and Lac La Biche Métis District within the homeland of Métis and the Otipemisiwak Métis Government, as well as Indigenous Peoples living in urban areas throughout Fort McMurray Wood Buffalo. 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 8

## APPRECIATION

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

- **Alona Cruz Farthing**, general manager, Merit Hotel
- **Ana Maria Mendez**, program events and community collaboration manager, McMurray Métis
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- **Kelly De La Ronde**, director, marketing & community engagement, Regional Recreation Corporation
- **Michael Sieger**, vice president, Air Service & Commercial Development, Fort McMurray International Airport
- **Stefanie Dobbin**, manager, Sports & Wellness Centre, Keyano College
- **Terra Brenneis**, program manager, Parks, Regional Municipality of Wood Buffalo
- **Terri Nielsen**, director, tourism, Fort McMurray Wood Buffalo Economic Development & Tourism
- **Verna Murphy**, executive director, Fort McMurray Heritage Society

## COMMITMENT TO SUSTAINABILITY & REGENERATIVE TOURISM

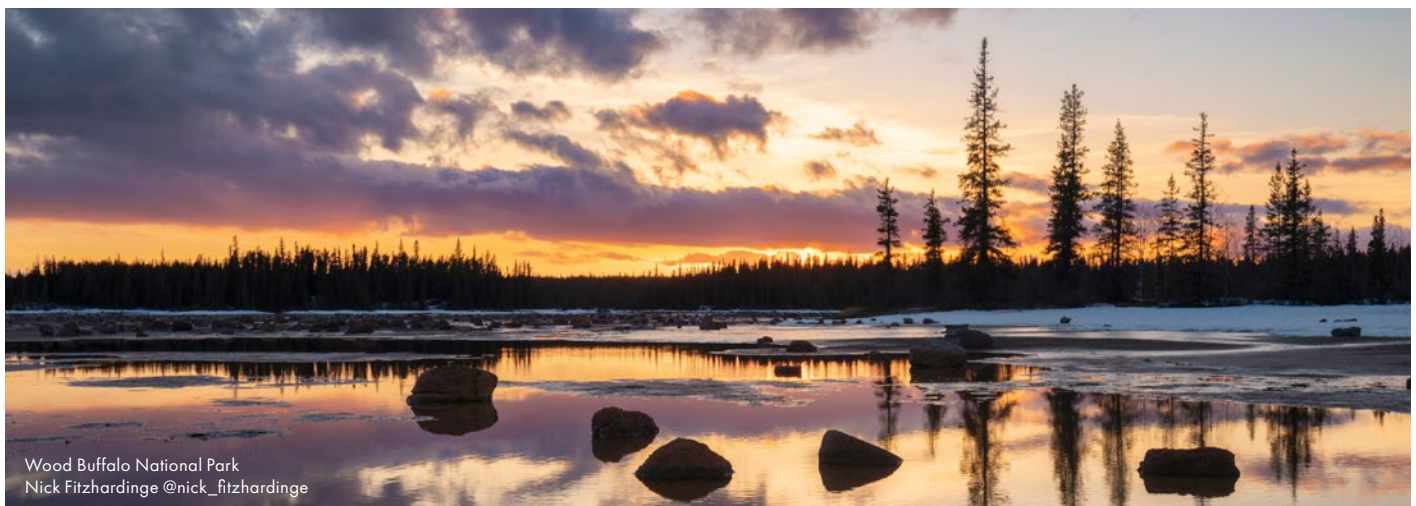
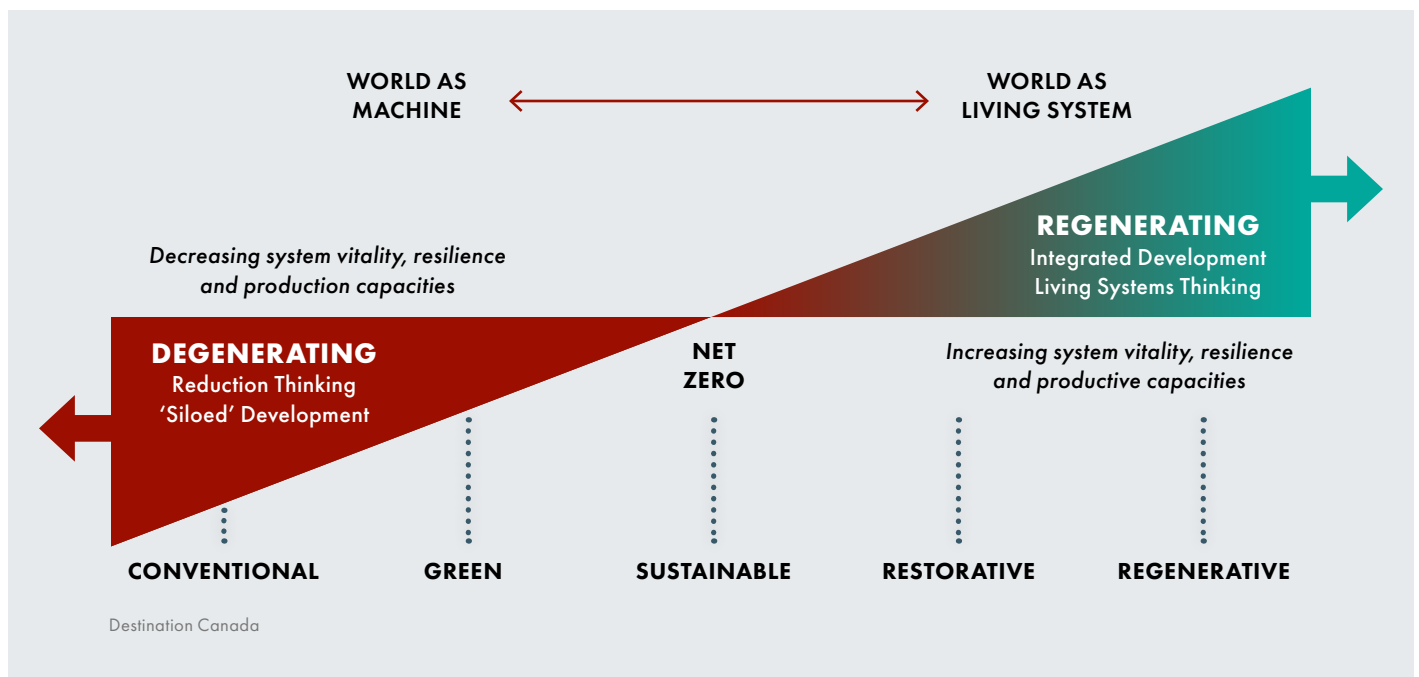
Tourism is a key economic sector in Alberta with strong potential to diversify the economy, create jobs, grow Indigenous tourism businesses, bring the “taste of place” to our guests’ tables and build vibrant communities. It also allows us to preserve and share culture and history, maintain or enhance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

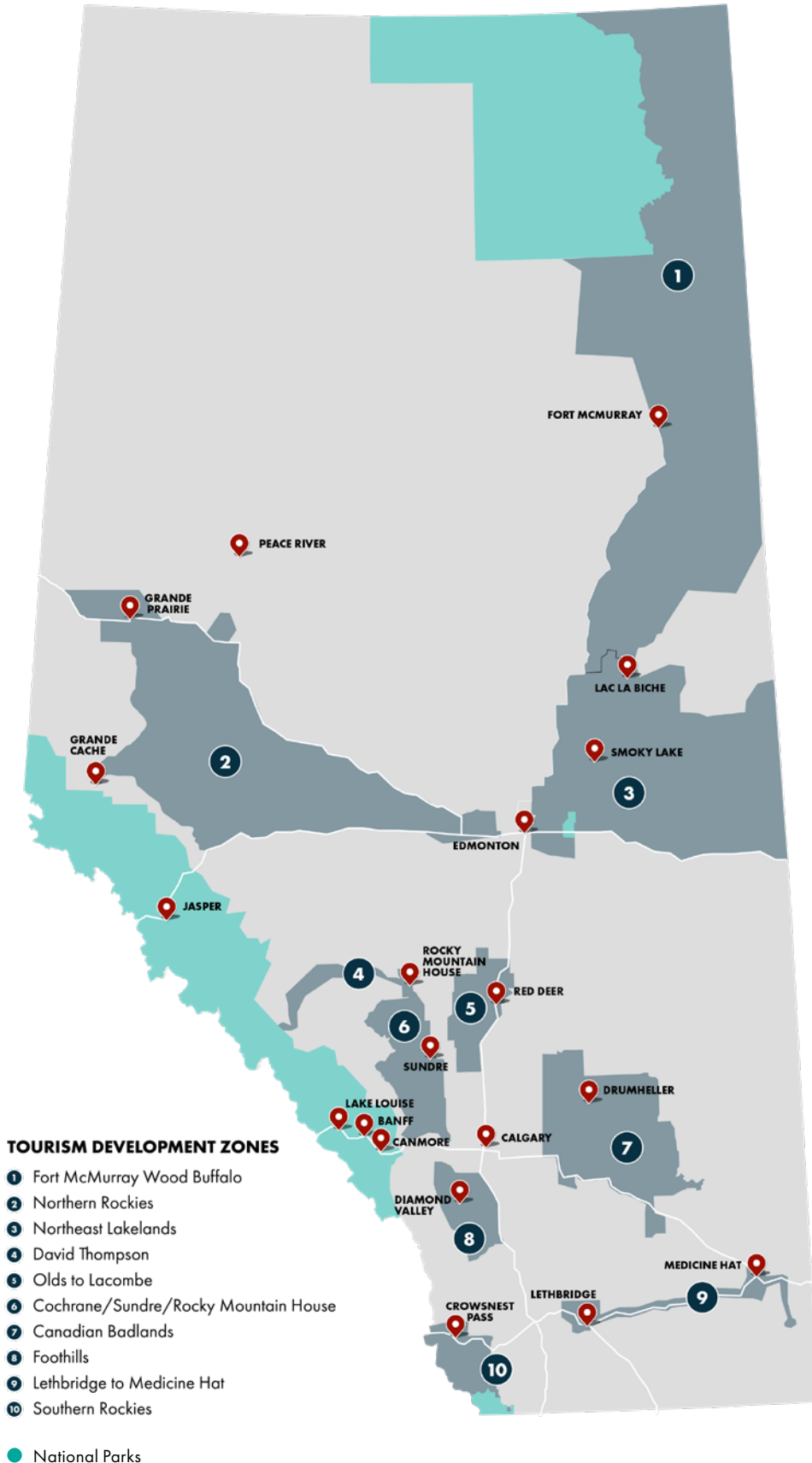
Pre-pandemic, nearly 60 per cent of visitation and 75 per cent of tourism expenditures occurred in the mature tourism destinations of Banff, Lake Louise, Canmore, Jasper, Calgary and Edmonton. By developing additional “emerging” destinations, we expand opportunities for Albertans to explore their own 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 Fort McMurray Wood Buffalo TDZ work together to address the following inter-related elements:



(Adapted from Failte Ireland)



## METHODOLOGY

Travel Alberta partnered with Legacy Tourism Group 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 Fort McMurray Wood Buffalo TDZ.

In the **“discovery and destination profiling”** phase, Travel Alberta worked with the consulting team to access and assess research material, build a steering committee (including local operators and government representatives), and establish a framework for engagement. Between October 2022 and February 2023, the consulting team held six meetings to compile research, review data and establish the zone’s asset inventory. Between October 2022 and March 2023, the consulting team held twenty stakeholder meetings, which included representatives of local businesses, experience operators, representatives from Fort

McMurray Wood Buffalo Economic Development and Tourism and representatives from the Regional Municipality of Wood Buffalo. Finally, during this phase, the consulting team held 21 separate engagement sessions (online and in-person) with Indigenous communities and entities to develop stronger relationships and determine which communities are currently offering, or wish to offer, tourism experiences in the zone.

In the **“exploring, imagining and visioning”** phase, the consulting team met with the steering committee and other stakeholders to determine opportunities, challenges and goals; facilitated planning sessions; completed the zone’s tourism asset inventory, evaluated land use context and constraints; conducted community assessments within the TDZ; toured the zone; and visited specific sites with tourism development potential. The destination analysis process was completed in collaboration with the steering committee, and results were vetted by other stakeholders. This vetting included both a major SWOT analysis review and a gap analysis review.



Mush McMurray, Fort McMurray  
Lens on Nature / Trent Enzol



# 04 STAKEHOLDER ENGAGEMENT



Wood Buffalo National Park  
Darren Roberts @darren\_roberts



# 177

**Stakeholders**

# 119

**Businesses**

# 10

**Communities**

## WHAT WE HEARD

In order to gain a comprehensive understanding of the Fort McMurray Wood Buffalo 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 visitor experience in the zone needs to be enhanced by assisting existing local operators to become market- and export-ready, as well as by developing new year-round tourism products, experiences and accommodations.
- There is great potential to develop winter experiences (such as Northern Lights/dark sky viewing) and winter recreational activities (such as dog sledding, snowshoeing, skiing, hunting and ice fishing).
- Tourism is still a small part of a broader local economy that is dependent on the oil and gas industry, but many stakeholders see the opportunities and benefits associated with tourism.
- Any actions or recommendations included in the Fort McMurray Wood Buffalo DDP need to directly contribute to the improvement of the environmental and social conditions within the zone.
- There are still many challenges that tourism businesses and entrepreneurs face when exploring opportunities for the development of new products and experiences. These challenges include availability of capital, access to land, and organizational capacity.



Beyond Adventure, Fort McMurray

# 05 INDIGENOUS ENGAGEMENT



Aurora Borealis Indigenous Village, Fort McMurray





Fort Fitzgerald  
Crystal Mercredi

As collaboration with Indigenous communities was identified early on as a significant opportunity in this zone, Travel Alberta began Indigenous engagement in the Discovery and Destination profiling phase for the Fort McMurray Wood Buffalo TDZ.

The objective of this initial engagement was to determine which communities are already involved in tourism and pursuing tourism development and which are interested in pursuing tourism opportunities in the future.

Representatives from 12 Indigenous communities, including Athabasca Chipewyan First Nation, Chard Métis Nation, Chipewyan Prairie First Nation, Conklin Métis Local 193, Fort Chipewyan Métis Association, Fort McKay First Nation, Fort McKay Métis Nation, Fort McMurray 468 First Nation, McMurray Métis Local 1935, Mikisew Cree First Nation, Smith's Landing First Nation and Willow Lake Métis Nation were invited to participate. Additional Indigenous communities throughout the TDZ will be engaged in the future.

Between October 2022 and March 2023, 21 separate Indigenous engagement sessions were held with 69 representatives of councils, administrations and associations identified with the 10 Indigenous communities that were willing and able to participate.

- Ten in-person meetings were held with representatives of eight communities, including Chard Métis Nation, McMurray Métis Local 1935, Fort McKay First Nation, Willow Lake Métis Nation, Fort McMurray 468 First Nation, Conklin Métis Local 193, Fort Chipewyan Métis Association and Athabasca Chipewyan First Nation.
- Nine separate virtual meetings held with five communities, including Athabasca Chipewyan First Nation, Chipewyan Prairie First Nation, Fort McMurray 468 First Nation, McMurray Métis Local 1935 and Mikisew Cree First Nation.

- An in-person meeting was held with Northeastern Alberta Aboriginal Business Association and a virtual meeting was held with ACDEN (the Athabasca Chipewyan First Nation's business arm).

We acknowledge that the summary below may not reflect the individual views of all community members. The engagement is ongoing, with further results to be available in the near future.

Most of the communities, organizations and individuals engaged see tourism as an opportunity to share their culture and heritage. Many expressed their community's interest in pursuing tourism development and identified tourism products and experiences already being offered. Furthermore, tourism was identified as a robust employment opportunity for Indigenous community members who do not want to work in oil and gas.

While there is certainly interest in building up the Indigenous tourism sector, there is still a need for greater connection and collaboration between the Indigenous communities. There is also a need for increased awareness of tourism's benefits and the programs and services that exist to support Indigenous businesses and entrepreneurs. Many Indigenous community representatives are enthusiastically anticipating the Indigenous Tourism Alberta Mini Gathering scheduled for January 30, 2024, held in partnership with Fort McMurray Wood Buffalo Economic Development and Tourism. At the Mini Gathering, Indigenous partners will have the opportunity to discuss market demand for Indigenous tourism, potential development opportunities and support programs available within the zone.

With support from Travel Alberta and Indigenous Tourism Alberta, Fort McMurray Wood Buffalo Economic Development and Tourism is currently completing additional Indigenous community engagement, which will provide further insights and observations. The Fort McMurray Wood Buffalo Economic Development and Tourism team is also working directly with interested Indigenous communities exploring their tourism business opportunities.



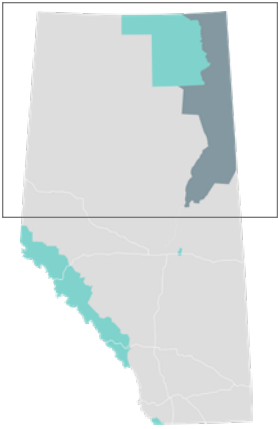
# 05 DISCOVERING THE DESTINATION



Vista Ridge Activity Park, Fort McMurray



## FORT MCMURRAY WOOD BUFFALO



Fort McMurray Wood Buffalo is the largest TDZ by land mass, spanning 61,871 squares kilometres. The zone lies in Alberta's northeast corner, its southern boundary marked by Highway 63 north of Lac La Biche and its northern boundary marked by the Northwest Territories border. It includes much of Wood Buffalo National Park, the urban service area of Fort McMurray and other small communities.

The zone offers compelling Indigenous history and outstanding natural assets — sand dunes, wildlife, lakes and waterways, trails, and several national and provincial parks, including the world's largest contiguous boreal protected forest area. Fort McMurray Wood Buffalo represents a tremendous opportunity to further develop Indigenous, nature-based and adventure tourism experiences such as backcountry camping; fly-in fishing and hunting; and Aurora Borealis and dark sky viewing. Development should focus on winter and shoulder seasons, when the Northern Lights are most visible (geomagnetic activity peaks around the spring and fall equinoxes).

Its accommodations, restaurants, and recreational and event facilities also put this zone in a strong position to host sports tourism, meetings, conventions, festivals and events.

### Authentic Indigenous experiences

The Fort McMurray Wood Buffalo zone is home to 12 different Indigenous communities with unique histories and cultures. There are excellent opportunities to develop authentic, market-ready Indigenous tourism

experiences that will not only draw visitation but will also help to share Indigenous languages, traditions and knowledge.

### Aurora Borealis/dark sky viewing

Home to Canada's largest dark sky preserve, the Fort McMurray Wood Buffalo zone is the perfect place to offer domestic and international visitors the opportunity to experience dark skies and the Aurora Borealis.

### The ultimate winter experience

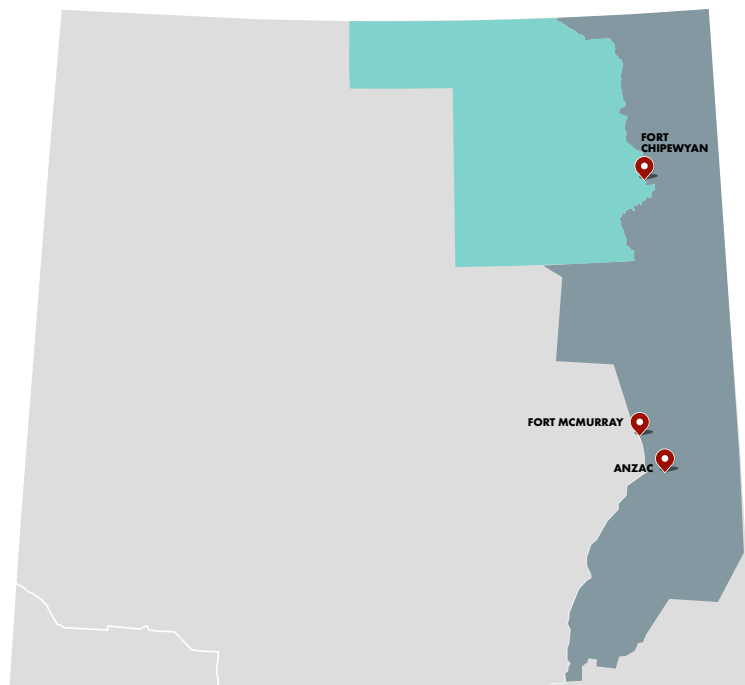
With a very consistent and predictable winter season, this zone has the potential to offer visitors the ultimate winter experience. Developing winter activities will create a shoulder/off-season draw for international travellers seeking immersion in a true Canadian winter — complete with skiing, snowshoeing, snowmobiling, dog sledding and glimpses of the Northern Lights.

### Outdoor adventure

This zone is a playground for outdoor adventure seekers. From trails and sand dunes to remote fishing and hunting to extensive waterway and winter road experiences, the landscape offers wilderness opportunities that will satisfy even the most daring traveller.

### Sport and event tourism

Boasting the second largest recreation complex in North America, the Fort McMurray Wood Buffalo TDZ already has the capacity to host large-scale sporting events. In general, the zone's current infrastructure is of sufficient scale and quality to attract competitive sports leagues, conferences, festivals, and arts and entertainment events.



## DEMOGRAPHICS AND POPULATION

The Fort McMurray Wood Buffalo TDZ, comprised of Anzac, Conklin, Draper, Fort Chipewyan, Fort Fitzgerald, Fort McKay, Fort McMurray, Gregoire Lake Estates, Janvier and Saprae Creek, had a population of 75,556 people in 2022. Between 2016 and 2021, the population of this zone increased 3.99 per cent and accounted for 1.7 per cent of the total Alberta population, making it one of the fastest-growing industrial communities in Canada. It is important to note that this region also has the highest national average median household income (\$200,000 annually).

Approximately 30,504 remote workers make up a shadow population of Fort McMurray.

**75,556**

POPULATION

**8,135**

INDIGENOUS POPULATION

**1.7%**

POPULATION GROWTH  
OVER PAST 10 YEARS

**9%**

UNEMPLOYMENT RATE

**\$200,000**

MEDIAN FAMILY INCOME

(Alberta Regional Dashboard, 2023)

## ECONOMIC PROFILE

As a site for oil extraction since the early 20th century, the Fort McMurray Wood Buffalo zone has played a significant role in the history of the petroleum industry in Canada. Today, the economy of this TDZ continues to rely on the oil and gas industry, but has also grown to include tourism, clean technology, arts, recreation, entertainment, retail and small business sectors.

**1,751**

BUSINESSES

**91.3%**

SMALL BUSINESSES

**\$19.8B**

MAJOR PROJECTS

(Source: Alberta Regional Dashboard, 2023)

## ACCESS

The Fort McMurray Wood Buffalo TDZ benefits from having one of Alberta's three international airports — the Fort McMurray International Airport — which provides critical access for domestic and international visitors drawn to epic experiences in the zone. Because road access is seasonal and limited in some areas, especially in the northern portion of the zone (including around Fort Chipewyan), reliable air access is critical. Currently, Fort McMurray International Airport offers approximately nine arrivals and departures daily: domestic inbound and outbound flights to and from Edmonton, Calgary and Toronto. Regularly scheduled daily flights to the Fort Chipewyan Regional Airport provide direct access to otherwise remote and seasonally inaccessible areas of the zone.

Dependable road access is provided throughout most of the Fort McMurray Wood Buffalo TDZ by highways 63 and 881, which form a high-grade looped network around the southern and central portions of the zone. The northern terminus of Highway 63 is at Bitumont, where the highway transitions into the Fort Chipewyan winter road, stretching over 159 kilometres through boreal forest landscapes, crossing the Peace-Athabasca Delta and exposing visitors to the rugged Kazan Upland ecosystem of Fort Chipewyan. While services are limited along these routes, both highways enable visitors to experience Alberta's boreal forest, and offer opportunities to view both local wildlife and the zone's natural resource industry.



## POLICY AND PLANNING CONSIDERATIONS

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

- Ninety-eight per cent of the zone is Crown land, with 71 per cent of this Crown land being managed by the provincial government under the Public Lands Act. The remaining 29 per cent is managed as provincial parks, recreation areas and ecological reserves under the Provincial Parks Act or the Wilderness, Ecological Reserves, Natural Areas, and Heritage Range Lands Act.
- The Crown land in this area is managed in accordance with the Lower Athabasca Regional Plan and the Cold Lake Sub-Regional Plan in the southern portion of the zone. Both plans specifically mention tourism and are important reference documents for tourism development on Crown lands.
- Municipal growth and land development, including tourism-related development, is managed in accordance with the Regional

Municipality of Wood Buffalo Municipal Development Plan and Area Structure Plans.

- The municipal plan supports the municipality in pursuing opportunities associated with cultural and historical tourism, sports tourism, industrial tourism, guiding and ecotourism. It identifies the following areas for future recreation and tourism growth and expansion: Richardson Backcountry (Six Lakes), Lake Athabasca, North Shore, Gregoire Lake, Christina Lake, Winefred Lake and Gordon Lake.
- The plan indicates that these areas will be explored for opportunities to develop new cottages, recreation lodges, boat launches, day-use areas and campgrounds. It also recognizes that expanding regional road systems, including connecting to Fort Chipewyan and Fort Fitzgerald, would provide new economic opportunities for recreation and tourism.

## DESTINATION ECOSYSTEM

### Destination Marketing

Fort McMurray Wood Buffalo Economic Development and Tourism is the main economic development organization and destination management organization (DMO) within this zone. In the organization's role as a DMO, its small but growing team provides strong leadership with a focus on supporting and encouraging tourism development. The Regional Municipality of Wood Buffalo provides funding to Fort McMurray Wood Buffalo Economic Development and Tourism.

Collaboration between the municipality and the economic development and tourism organization is extensive and they work cooperatively on advancing economic development initiatives.

These organizations' work with Indigenous Tourism Alberta and Travel Alberta ensures that there is ongoing engagement and support to develop and enhance the tourism appeal of the Fort McMurray Wood Buffalo TDZ.

### Economic Development Organizations

In the “Fort McMurray Wood Buffalo Economic Development and Tourism’s Inaugural Five-Year Economic Development & Tourism Strategy (2022 - 2026),” released in coordination with the “Regional Municipality of Wood Buffalo Council Strategic Plan,” tourism is listed as one of the top priorities.

Focused on driving the economic competitiveness of Fort McMurray Wood Buffalo, the strategy emphasizes the central role stakeholders and rights holders will play in increasing the region’s ability to compete nationally and globally for investment, visitation, talent, entrepreneurship and innovation. The strategy also acknowledges that Alberta’s north has an opportunity to develop Northern Lights and outdoor tourism as a way to diversify the economy, and that this zone can become an appealing destination for visitors interested in hunting and fishing.

Startup YMM, a business advisory program overseen by Fort McMurray Wood Buffalo Economic Development and Tourism, was established in 2020 to assist local businesses and will play a key role in the success of the strategy.

Community Futures Wood Buffalo assists new and potential small businesses start, grow, expand, franchise or sell by offering business training programs, networking events and flexible business loans. The organization aims to help the region thrive through rural economic diversification. It has a great track record of supporting businesses in tourism, outdoor sports and recreation, oil and gas, and the industrial sector by working closely with entrepreneurs, community leaders and key stakeholders.

## VISITATION

According to Travel Alberta’s anonymized mobile data, in 2019, 96 per cent of visitors to this zone were from within Canada and under three per cent were from the United States. While most of the visitation to the zone is domestic, the area does see some visitors from other parts of Canada. British Columbia accounts for just under eight per cent of visitors, followed by Saskatchewan and Ontario.

### AB

#### VISITOR ORIGIN

Visitation to Fort McMurray Wood Buffalo, like the whole of Alberta, is highly domestic, with the majority of visitors coming to the area from nearby Edmonton (46 per cent), Calgary (20 per cent), Vancouver (2.3 per cent), Red Deer (two per cent), and Saskatoon (1.9 per cent).

### 44%

#### REPEAT VISITORS

Just over 40 per cent of visitors to Fort McMurray Wood Buffalo visit two or more times per year.

### 55 hours

#### AVERAGE LENGTH OF STAY

On average, visitors spent just under 55 hours, or two days and one night, in this zone. International visitors to the zone spend just over an average of 40 hours. Generally, a longer stay, including overnight, will result in visitors spending more.

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

(Source: Near Mobile Data, 2019)



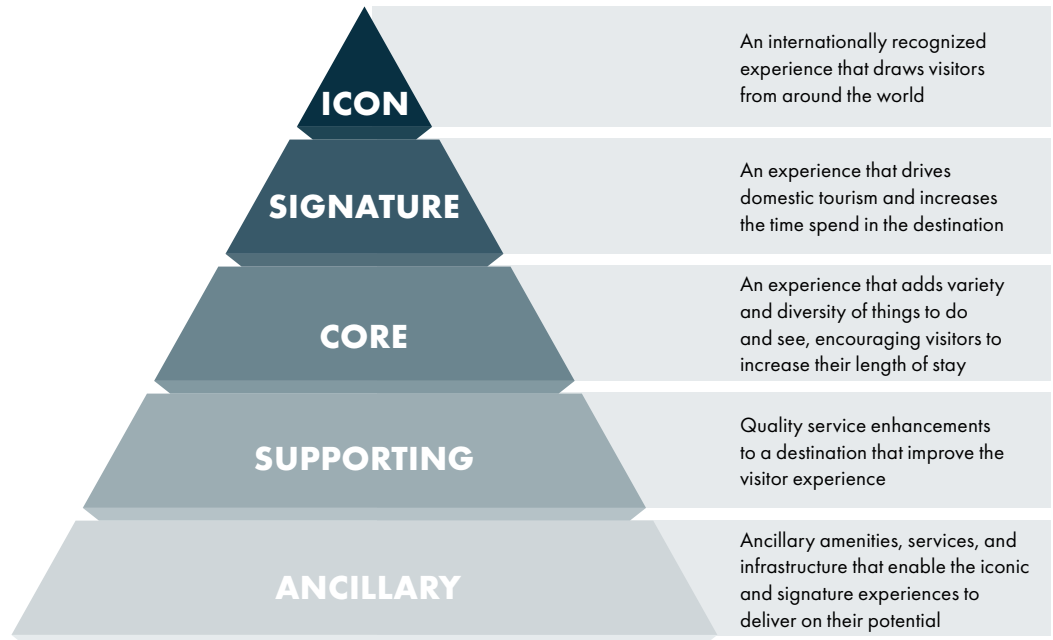
# 05 DESTINATION ANALYSIS



Snye River, Fort McMurray

## 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)

Many of the existing tourism products in the Fort McMurray Wood Buffalo TDZ support the oil and gas sector and were originally built to accommodate the large, established resource industry within the zone. What is lacking is a large-scale anchor product that will draw high-value visitation to the area and help to differentiate this zone as a unique, must-see attraction for both domestic and international travellers. Additional supporting products and amenities, such as accommodations and restaurants, are required in the more remote areas of the zone where tourism development opportunities have been identified. Filling gaps in product types will be a priority as we work to develop this zone into a desirable tourist destination.



Bicentennial Museum, Fort Chipewyan  
Lens on Nature / Trent Enzol



**Supply: Accommodation Mix**

Though there are many (66) accommodation options in the urban centre of Fort McMurray, there is a significant gap in the quality and diversity of these industry-facing accommodations, many of which will not meet the needs of a leisure traveller. Currently, occupancy levels are directly related to the fluctuating state of the oil and gas industry. While hotels may appear to be performing well, their business may not necessarily be derived from the visitor economy.

A few backcountry fishing, hunting and northern lights-viewing lodges are scattered around some of the zone's bodies of water, including Winefred Lake, Christina Lake, Gypsy Lake and Andrew Lake. Camping accommodations are also available in the

zone — its five serviced and 10 un-serviced campgrounds are often at capacity during peak seasons. However, in general, there is a lack of accommodations outside of Fort McMurray. This gap could be bridged by the construction of boutique hotels and higher-value unique accommodations in high-potential areas identified throughout the TDZ.

The Fort McMurray International Airport has been trying to entice a hotelier to build a hotel on the airport property; however, hoteliers require 40-45,000 monthly arrivals to justify a new build, and the current number sits at 30,000. New, tourism-centric accommodation will only be constructed if guest experiences that integrate with and amplify the need for accommodation are created.

**2,257**  
ESTIMATED  
HOTEL/MOTEL ROOMS

**Supply: Products and Experiences**

Boasting 1.4 million hectares of parks and protected areas, Canada's largest national park (Wood Buffalo National Park), the largest contiguous boreal protected area in the world, the largest inland freshwater delta in the world, as well as the world's largest dark sky preserve, beaver dam, white water rapids and sand dune complex, the Fort McMurray Wood Buffalo TDZ is where wander meets wonder. An asset inventory completed by Legacy Tourism Group as part of the project research within the Fort McMurray Wood Buffalo TDZ identified 113 existing assets or tourism-related products and experiences, with key operators identified and categorized as follows:

**Nature, adventure and ecotourism:**

- Andrew Lake Lodge and Camp
- Gypsy Lake Lodge
- Pearson Lake Lodge
- Winefred Lake Outfitters
- Winefred Lake Lodge
- Wild Feathers Inc. (Fort McMurray)
- Running Bear Wilderness Adventures (Fort McMurray)
- Controlled Chaos (Fort McMurray dog sledding tours)
- Beyond Adventures (canoe and paddle board adventure and rentals)

**Culture, heritage and arts:**

- Fort McMurray Heritage Shipyard
- Fort McMurray Heritage Village
- Fort McMurray Oilsands Discovery Centre/Giants of Mining exhibit
- Keyano Theatre and Arts Centre
- Kirschner Family Community Art Gallery

**Indigenous experiences**

- Aurora Borealis Indigenous Village and Retreat
- Fort Chipewyan Bicentennial Museum
- McMurray Métis Local 1935 Cultural Centre (currently in the planning and development stage)
- Athabasca Tribal Council Cultural Festival

**Sports, festivals and events**

- Vista Ridge All Seasons Park
- Suncor Community Leisure Centre (McDonald Island)
- Shell Place (McDonald Island - conventions, conferences and events)
- Miskanaw Golf Club
- Fort McMurray Golf Club
- Fort McMurray Food Festival

**Provincial and national parks and historic sites**

- Richardson Wildlife Park
- Kazan Wildland Provincial Park
- Gypsy Lake Wildland Provincial Park
- Dillon River Wildland Provincial Park
- Stoney Mountain Wildland Provincial Park
- Margeurite River Wildland Provincial Park
- Kitaskino Nuwenene Wildland Provincial Park
- Wood Buffalo National Park
- Gregoire Lake Provincial Park
- Lake Athabasca

**According to Travel Alberta's anonymized mobile data (2019), the most-visited\* tourism destinations in the Fort McMurray Wood Buffalo zone include:**

- **McDonald Island Park**
- **Lake Athabasca**
- **Gregoire Lake Provincial Park**

\* Please note there are several areas in the zone that have limited reception. Inconsistent mobile coverage may impact this ranking.

### Demand: Amongst Albertans

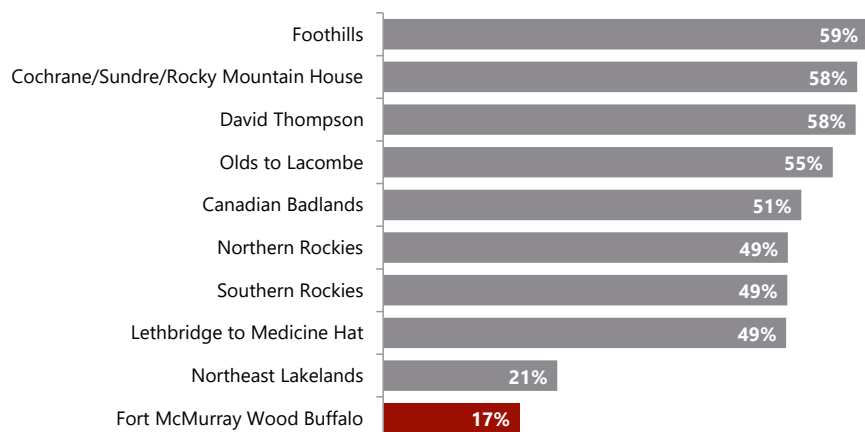
Perception research conducted by Travel Alberta in November 2022 was undertaken to better understand the awareness, perception, and travel interest to each of the 10 TDZs. Over 1,000 Albertans were surveyed. Key findings from this research indicated:

- There is very low familiarity with the zone as a tourism destination
- Respondents don't see themselves as likely to visit the zone
- Under 50 per cent of respondents have a positive overall impression of the TDZ.

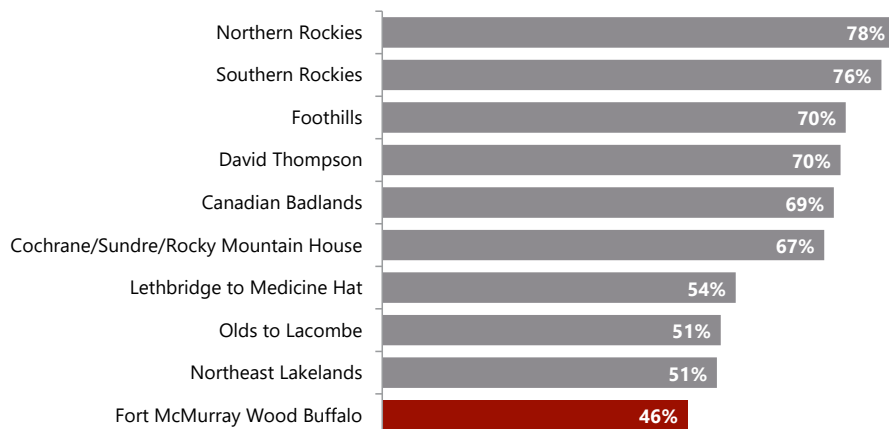


Birchwood Trail System, Fort McMurray

### Familiarity with Destination (Per cent familiar with each TDZ)



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





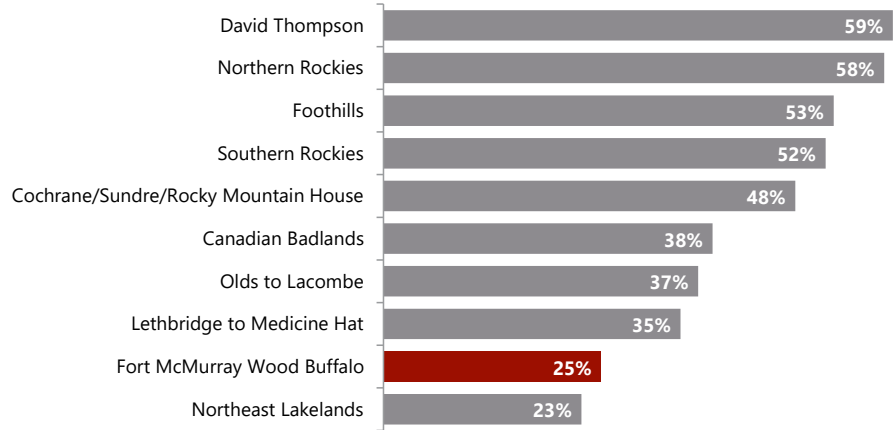
**Likelihood to Visit Destination (Per cent likely to travel to each TDZ)**

**64%**

MOST LIKELY TO VISIT  
BETWEEN JUNE TO AUGUST

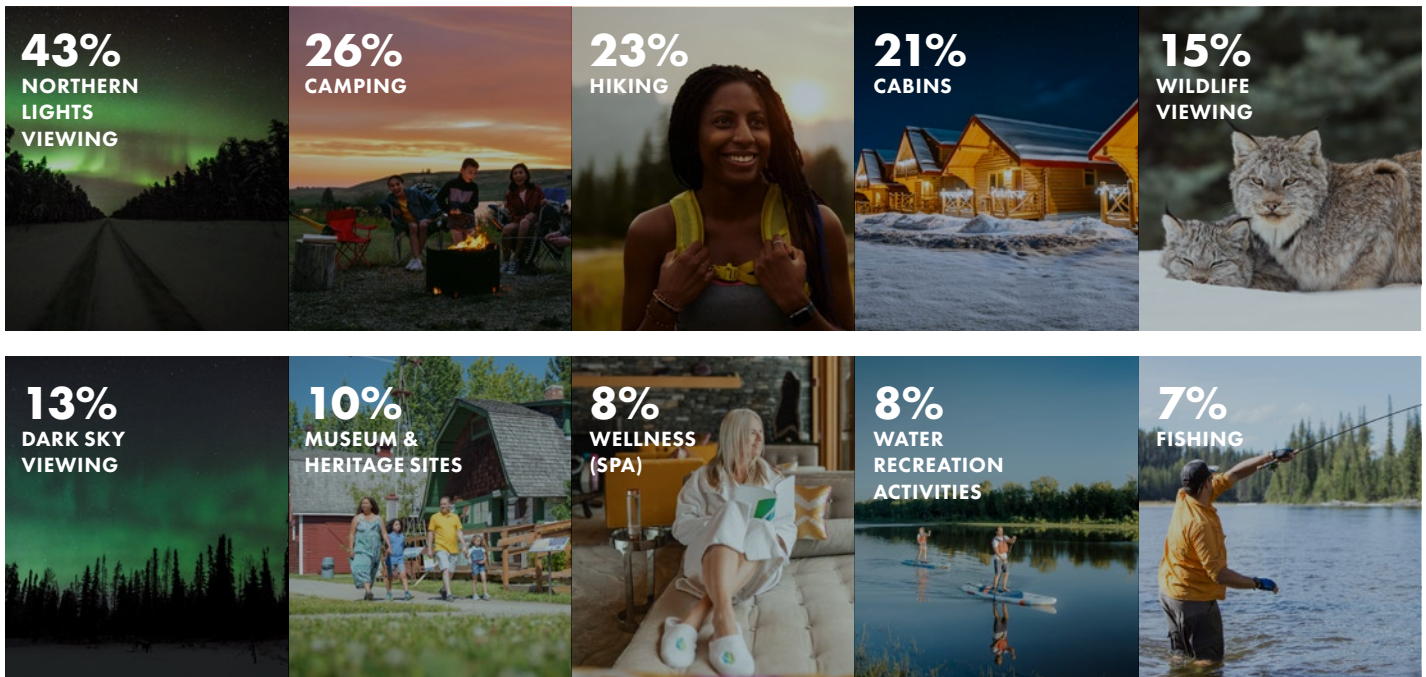
**33%**

LIKELY TO ONLY STAY  
BETWEEN THREE AND FOUR NIGHTS



**Activities Albertans are most likely to enjoy in the Fort McMurray Wood Buffalo TDZ**

Northern Lights Viewing was identified as one of the activities potential visitors would like to participate in.



[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 Global Tourism Watch align extremely well with the landscape and future product potential in the Fort McMurray Wood Buffalo TDZ. The greatest alignment between top trip anchors products and experiences is with visitors from US and across Canada, who identify Northern Lights as one of the attractions most likely to draw them to a region.

Key trip anchors of interest to international markets represented in the Fort McMurray Wood Buffalo TDZ include:

- Northern Lights/dark sky viewing
- Natural attractions
- Experiencing Indigenous cultures, histories and traditions
- Hiking
- Camping
- Fishing, hunting
- Visiting nature parks
- Wildlife viewing

Tourism development that focuses on Northern Lights viewing, natural attractions and Indigenous experiences will be important for the zone, as it will create the most interest for international visitors.

(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.

By creating a diversity of products and experiences within the Fort McMurray Wood Buffalo TDZ – and by taking full advantage of the zone's world-class sporting facilities, air access, accommodations, meeting and convention spaces, dining, shopping and cultural attractions – we can begin to attract and welcome Curious Adventurers, Hotspot Hunters and other visitors drawn to this unique corner of the province.

Ideal visitors to this zone include:

- Canadian and American long-haul travellers interested in outdoor adventures (back country hiking, Indigenous experiences, paddling, jet boating, OHV riding, camping, dogsledding, snowmobiling, etc.)
- International travellers (particularly from the U.S., U.K., Denmark and Germany) interested in hunting and fishing tours
- International travellers (particularly from Japan, China and South Korea) willing to go the distance for dark sky and Northern Lights experiences



Wood Buffalo National Park  
Nick Fitzhardinge @nick\_fitzhardinge

The travellers most likely to be attracted to the Fort McMurray Wood Buffalo TDZ are Curious Adventurers, for whom travel is about getting a different perspective on the world. The Fort McMurray Wood Buffalo TDZ has the potential to attract Curious Adventurers by offering authentic Indigenous cultural experiences, unique guided experiences that introduce visitors to the zone's wild landscapes and once in a lifetime dark sky/ Northern Lights viewing experiences.



Heritage Village, Fort McMurray

The zone could also attract Hotspot Hunters by developing additional products and experiences. For Hot Spot Hunters, travel is about achievement and accomplishments. Examples of products and experiences that appeal to these travellers are staying at luxury boutique accommodations, visiting historical and cultural landmarks and learning a valuable or unique new skillset from a local expert.



**Trends impacting tourism**

As destination organizations at all levels and businesses 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 its 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 has immense potential to offer unique Indigenous and remote nature-based experiences. There are also opportunities to develop new accommodations and experiences that directly reflect and showcase the diversity of the people, history, geography and culture that make up this unique TDZ. By building on the work of existing operators and supporting those interested in developing new experiences, we will be able to differentiate this TDZ from the others and attract high-value travellers drawn to experience Indigenous culture, Northern Lights and dark sky viewing, and adventure travel.

**Regenerative travel going local**

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

The Fort McMurray Wood Buffalo TDZ is focusing heavily on sustainable and regenerative efforts across all sectors, from carbon-neutral resource extraction and land reclamation to sustainable and eco-friendly infrastructure to caribou recovery and protection. These efforts will attract travellers that are conscious of sustainable and regenerative practices when choosing destinations to visit. Additionally, the zone has many locally owned businesses; travellers will be happy to know that their vacation dollars are directly impacting the communities they visit.

**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.

This TDZ has many remote, yet-to-be-discovered destinations and experiences. Fly-in experiences, such as Andrew Lake Lodge, have the potential to attract travellers looking for immersive adventure in a wilderness setting. By developing and expanding on such experiences, this zone could become a sought-after destination for young travellers looking for an exotic experience.

**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 zone can use its remote locations to its benefit by developing and expanding on existing fly-in lodges and unique accommodations. Lodges and retreats that offer a multitude of services, experiences and comforts encourage visitors to stay longer and spend more. Creating an abundance of high-end cultural experiences across the zone will also attract visitation and entice visitors to stay, spend and ultimately, increase tourism revenue across the TDZ.

[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.

Resident sentiment towards tourism development in the Fort McMurray Wood Buffalo zone is mixed and, on average, lower than other TDZs. However, this attitude reflects a lack of understanding of tourism's positive socio-economic impacts. With greater awareness, positive resident sentiment is expected to rise within the TDZ. Pride of place is very strong among residents, but, when asked if they would consider their region to be a tourism destination, most said no. While this

zone performed on the lower side in terms of resident sentiment, generally, residents do see the importance of tourism and look forward to showing off their communities.

Overall, residents of Fort McMurray Wood Buffalo, like residents of other rural destinations across the province, are interested in seeing more visitors in their community. However, it is crucial for stakeholders to recognize that the tourism sector must grow and develop in a manageable way. It will continue to be important to foster deeper connections with residents in this TDZ and demonstrate the economic benefits of tourism to Fort McMurray Wood Buffalo communities. Engaging and educating residents will be essential to fostering support for tourism development within the zone.

### Highlights: Resident Sentiment

QUESTIONS	TOTAL ALBERTA RESIDENTS	FORT MCMURRAY WOOD BUFFALO RESIDENTS
Community leaders should look at developing more attractions and events to attract tourists	72%	92%
I know enough about my community that I could build an itinerary of things to see and do	66%	80%
How important is the tourism industry to Fort McMurray Wood Buffalo	70%	68%
Tourism has impacts on local employment opportunities	71%	57%
Tourism impacts the diversification of the community	59%	68%
I would welcome more visitors to my community	62%	87%
Tourism increases the cost of living and makes things less affordable for residents	48%	63%

(Source: Stone Olafson, 2023)



## SWOT ANALYSIS

Using findings from primary and secondary research and extensive stakeholder engagement, the consulting team conducted a strengths, weaknesses, opportunities and threats (SWOT) analysis to evaluate the Fort McMurray Wood Buffalo TDZ. The analysis takes into consideration both the current and potential future drivers that will influence tourism within the zone.

### Strengths

- Very strong and active Indigenous communities
- Fort McMurray International Airport (international/domestic connections and potential for onsite tourism)
- Proximity to Wood Buffalo UNESCO World Heritage Site and RASC Dark-Sky Preserve (Canada's largest national park)
- Peace-Athabasca Delta (UNESCO World Heritage Site, largest freshwater inland delta in North America), largest continuous network of boreal protected area in the world, and largest sand dunes complex in Canada (with OHV access from Richardson Backcountry)
- Strong remote consumptive (hunting/fishing) tourism sector, which includes developed lodges
- Keyano College's Hospitality and Tourism Management program
- Engaged community leaders
- Strong municipal support for tourism
- Highest household income in Canada (strong local market)
- Accessible river systems, including Trans Canada Trail's arctic route and designated Canadian Heritage Rivers
- Large opportunity to develop Northern Lights/dark skies experiences (largest dark sky preserve in the world)
- Tremendous historical narratives (oil sands boom, bush pilots, Indigenous heritage, river travel and fur trade)
- Existing major infrastructure investments (McDonald Island, Oil Sands Discovery Centre, McMurray Métis Cultural Centre)
- History of and experience in hosting major events
- Remarkable cultural diversity and celebration of this diversity
- Alberta's only winter roads (unique opportunity for remote winter experiences)
- Unique topography and geography (Canadian Shield)

### Weaknesses

- Limited awareness of the zone relative to other Canadian tourism destinations
- Oil sands narrative can override other identities of the region
- Limited diversity of market- and export-ready tourism products and experiences outside of the Fort McMurray urban centre
- Transportation challenges (insufficient/seasonally accessible roads, spotty cellular service, etc.) north of Fort McMurray area
- Lack of guided services and rental equipment to support nature-based, adventure and ecotourism markets
- Informal and potentially unsustainable marketing approaches for OHV experiences that may end up promoting activities that are currently illegal
- Difficult land use planning and permitting process for tourism development on Crown lands
- Difficulties in obtaining leases for tourism businesses in Fort McMurray
- Volatility of the oil and gas economy
- Limited purpose-built, managed and experience-focused trails and outdoor recreation amenities — most trails are yet to be formally designated or actively managed and maintained as tourism assets
- Lack of operators who are engaged in tourism full-time
- Insufficient accommodations specifically built for tourism, rather than industry
- Labour shortage and competition for labour with other sectors offering higher wages
- No effective centralized calendar of events

## Opportunities

- Develop new and enhance existing Indigenous tourism experiences
- In collaboration with the local Indigenous community, create a Richardson Backcountry OHV experience, complete with Aurora Borealis viewing and unique boutique accommodations for winter road visitors
- Integrate new zone-wide branding strategy (“The ultimate destination for authentic Canadian winter experiences”)
- Enhance collaboration and integration of Keyano College programs and with the tourism sector
- Create tourism experiences aimed at industry camp employees
- Engage residents in ways that demonstrate the benefits of tourism
- Host events (sport, entertainment) at pre-pandemic frequency and capacity
- Designate, develop, promote and maintain high-quality long-distance trails and routes (OHV/snowmobile, mountain bike/road bike, canoe/kayak, foot)
- Develop authentic Canadian winter experiences
- Expand Fort McMurray International Airport, both for tourism traffic and for additional international and domestic connections
- Develop and construct a boutique resort/spa that could become an anchor product for Fort McMurray
- Strengthen collaboration between operators and cultural and sport organizations
- Develop Snye River area for Athabasca River experiences and tourism in general
- Develop Fort McMurray’s waterfront area and improve access to the Athabasca River and Clearwater River
- Develop new water-based tourism experiences (whitewater rafting, floats, paddle boarding, canoeing)
- Enhance industrial tourism

## Threats

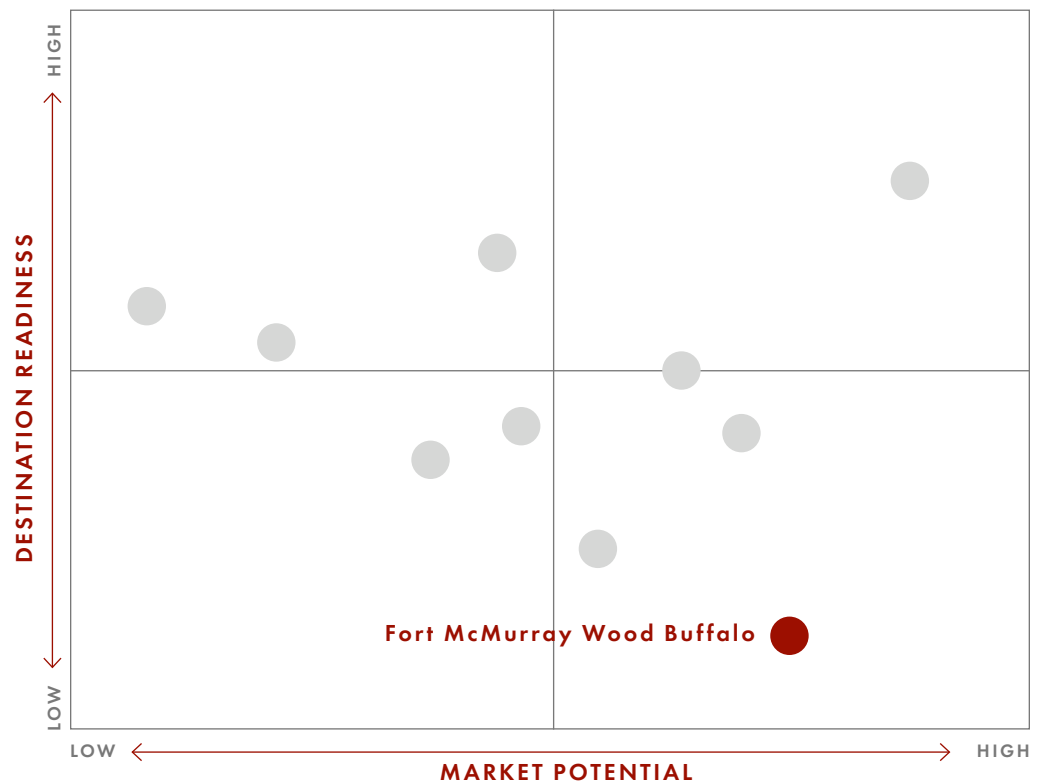
- Continued/increased difficulty in sourcing capital for operators
- Difficulty for tourism operations to obtain permits to access Crown lands in areas of high tourism potential
- Potential for increased land-use conflicts in wilderness areas due to incompatible industrial developments adjacent to high-tourism-potential Crown lands (e.g. metallic minerals near Richardson)
- Potential for an unbalanced approach to planning that may inhibit the realization of some nature-based tourism opportunities
- The tourism labour shortage may be exacerbated if other industries in the region increase hiring of locals
- Ambivalent or unfavourable resident sentiment towards tourism development
- Unmitigated recreation/OHV impacts on the Richardson Dunes area and elsewhere
- Industrial impacts to potential high-value areas for recreation/tourism where land-use overlaps exist
- Increased costs of materials and supplies due to supply chain challenges
- Increased costs of travel
- Potential for declining population base
- Competitive winter and Aurora Borealis products in Yukon/Northwest Territories



## DESTINATION MATURITY AND READINESS

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

- Access to land for tourism development (competing land uses)
- Lack of awareness (both inside and outside the TDZ) of destination offerings due to the lack of available information and pre-existing attitudes surrounding the resource industry within the zone
- Limited or seasonally restricted access to some northern areas within the zone due to lack of existing transportation infrastructure and year-round access routes



The grey dots represent the position of the Fort McMurray Wood Buffalo TDZ relative to the ten other TDZs across the province.

# 05 VISION FOR THE FUTURE



Running Bear Wilderness Adventures, Fort McMurray



**“As Alberta’s gateway to the arctic, Fort McMurray Wood Buffalo is known for epic natural wonders and living history. The combination of these features creates a tremendous opportunity to develop an exceptional visitor economy. Fuelled by remarkably diverse and resourceful people, our zone will become Canada’s premier destination for authentic four-season and Indigenous experiences.”**

– Fort McMurray Wood Buffalo TDZ Steering Committee

## DESTINATION 2035

Known as “the ultimate Canadian winter destination”, Fort McMurray Wood Buffalo is the land of the Northern Lights, where visitors from across the globe enjoy viewing dark skies from some of the most unique accommodations in Alberta. Whether learning about Indigenous ways of life, flying out to a remote lodge, exploring the incredible backcountry, attending (or competing in) a world-class sports event, enjoying local flavours, or learning more about the zone’s peoples, heritage and industry, travellers to this zone are treated to a true northern experience.

By 2035, the Fort McMurray Wood Buffalo TDZ will have developed the necessary infrastructure and access to maintain a sustainable year-round visitor economy. By creating high-value, unique accommodations; immersive cultural experiences; and nature-based adventure packages, this TDZ will show its true tourism potential to local residents, domestic travellers and the rest of the world.

## STRATEGIC INITIATIVES

In support of tourism development within the Fort McMurray Wood Buffalo TDZ, multiple strategic initiatives were identified by local stakeholders and communities. This included:

01. Support tourism leadership at a local level
02. Create an enabling environment for tourism entrepreneurs
03. Increase the overall accommodations offering, with a focus on upscale boutique hotels, fly-in remote lodges and other unique accommodations
04. Increase the overall product offering, specifically focusing on products that appeal to high-yield travellers (for example, Northern Lights viewing) across the TDZ
05. Build up and maintain resident sentiment in support of tourism and its positive impact on local quality of life and economic diversification
06. Position tourism as a contributor to the local economy and as means to diversify the local economy

## 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 Southern 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**

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.



Fort McMurray Heritage Shipyard



# 06 CONCLUSION AND NEXT STEPS

With its wild landscapes, rich cultural heritage and plethora of natural wonders, the Fort McMurray Wood Buffalo TDZ represents a significant opportunity to appeal to high-value travellers through the development of tourism infrastructure, amenities, products and experiences related to Indigenous heritage and traditions, wilderness adventure, fishing and hunting, events and conferences, and Northern Lights/dark sky viewing.

While tourism offers an important path to economic diversification in a zone that is still dependent on resource industry, in order to realize the Fort McMurray Wood Buffalo TDZ's tourism potential, stakeholders and local communities must:

- Develop new unique and upper-scale accommodations throughout the TDZ
- Significantly increase the number of tourism experiences available to visitors during all four seasons (with an emphasis on the winter and shoulder seasons)
- Develop at least one anchor attraction in or near Fort McMurray
- Address current policy and planning barriers to tourism development on Crown land
- Find creative solutions in situations where tourism development and industry needs have competing priorities (especially regarding land use)
- Take full advantage of the possibilities for tourism development offered by the zone's considerable natural assets
- Collaborate intensively with local Indigenous communities, organizations and businesses to develop a robust Indigenous tourism sector
- Promote the zone as offering "the ultimate Canadian winter experience"
- Increase and improve road access and infrastructure throughout the zone, empowering tourism businesses and operators and facilitating a better experience for visitors navigating the TDZ

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



Gypsy Lake Lodge, Gypsy Lake Wildland Park



**CONTACT YOUR DESTINATION  
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