Strathcona County Tourism Strategy and Implementation Plan

DRAFT: MAY 13, 2020

STRATHCONA COUNTY

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May 13, 2020

Shane Olson
Manager, Commercial Development
Strathcona County
2001 Sherwood Dr.
Sherwood Park, Alberta, T8A 3W7

Dear Mr. Olson,

Please find enclosed the draft Strathcona County Tourism Strategy and Implementation Plan. It has been a pleasure working with you to develop this report and we are looking forward to reviewing it with you.

If you have any questions or require clarification on the attached report, please feel free to contact me at 780.266.7888.

Sincerely,

Justin Rousseau, Managing Director
Expedition Management Consulting Ltd.

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EXECUTIVE SUMMARY

COMMUNITY OVERVIEW

Strathcona County is a safe, dynamic and welcoming community that attracts people of all ages, cultures and walks-of-life. It is a specialized municipality situated in the Edmonton Capital Region and Alberta's Industrial Heartland. The community offers a unique mix of urban amenities and rural atmosphere.

It is clear that Strathcona County has significant tourism assets, including access to an international airport, strong ground transportation links, proximity to an urban market of 1.2 million people, an attractive nature-based offering, established sport tourism activity, an emerging agritourism cluster, and compelling special events. If developed effectively, tourism has the potential to have a significant diversifying effect on the economic base of Strathcona County. As tourism is further developed in the community, the benefits will be shared with other sectors of the economy, such as transportation, food and beverage, accommodations, retail, recreation and others. Tourism is an industry of industries that Strathcona County can leverage for economic growth now and in the future.

For the purposes of this report, tourism can be broadly defined as:

"The activities of people travelling to places outside their usual environment for leisure, business or other purposes for not more than one consecutive year."

LEGEND:

- Indicator supports the tourism readiness of the community.
- Indicator neither supports nor detracts from the tourism readiness of the community.
- Indicator detracts from the tourism readiness of the community.

STRATHCONA COUNTY'S TOURISM READINESS

A number of current indicators support the assertion that Strathcona County is ready to pursue tourism development (see below). For an expanded discussion on each of these indicators, please see Section 4 – Destination Analysis and Section 5 – Market Analysis.

Tourism Readiness Assessment for Strathcona County

INDICATOR	KEY FINDING(S)	TOURISM READINESS
SWOT ANALYSIS	• Strathcona County has key strengths from which to build on, including strong existing assets, a strategic location, and a safe, welcoming community that combines urban amenities with a distinct rural atmosphere. • There are significant opportunities to sustainably grow tourism, while simultaneously supporting the County's other economic sectors. • There are currently barriers to tourism growth, such as an underdeveloped tourism support system, unclear tourism brand, and a lack of market-ready tourism products. However, these barriers can be overcome with concerted effort and investment.	✓
STEEP ANALYSIS	• Tourism is a resilient growth industry and can play a significant role in diversifying Strathcona County's economy. • There is strong support from provincial and federal governments to grow tourism.	✓
STRATEGIC ALIGNMENT ANALYSIS	• Growing tourism in Strathcona County was found to be in alignment with the goal of the County's Strategic Plan to cultivate economic diversification.	✓
TOURISM SERVICE DELIVERY ANALYSIS	• Strathcona County's tourism service delivery system is underdeveloped. There are limited tourism support services, which has resulted in limited tourism development.	✗
TOURISM ASSET INVENTORY	• Several important strengths were identified in relation to Strathcona County's tourism assets, including natural attractions, agritourism assets, community and sport facilities, the capacity to host sports events, cultural attractions and events, and accommodations. • However, many of these assets are underdeveloped and some will need to be enhanced to provide more experiences to visitors.	⏸
COMMUNITY ENGAGEMENT RESULTS	• There was strong support among many stakeholder groups to develop tourism in Strathcona County, including local businesses, community organizations, festivals and events, and government representatives. • Although the response to the public survey was lower than expected, there was support for tourism development among respondents.	✓
MARKET ANALYSIS	• There are strong existing visitor markets that are actively seeking experiences Strathcona County can offer.	✓
COMPETITIVE ANALYSIS	• Strathcona County faces stiff competition from established destinations that compete for similar visitor markets. Significant investment and effort will be needed to win market share among some traveller segments. • Strathcona County has differentiated itself in the area of nature-based tourism with assets such as the Beaver Hills Biosphere Reserve, Elk Island National Park, Strathcona Wilderness Centre, Cooking Lake – Blackfoot Provincial Recreation Area, and the North Saskatchewan River. • The County is also known for offering high quality sporting events.	⏸

CASE FOR CHANGE

Strathcona County's primary economic base is the petrochemical and hydrocarbon sector. However, the current economic situation in the province has curtailed investment and income in the energy sector. This may lead to business owners, employees and residents in Strathcona County to look to other industries for opportunity.

Tourism is a growth sector for the province, and Strathcona County has identified tourism as a key opportunity to diversify and support the local economy. Additionally, local businesses and stakeholder groups have expressed their support for tourism development in Strathcona County. At a time when Alberta's economy is at a historic low, what is needed now is the will to take action to develop the local visitor economy.

WHY INVEST?

"The County's strategic location, strong support from stakeholder groups, key receptive markets, and a multitude of assets presents a significant opportunity for tourism development. A strategic investment now will help tourism flourish and support other industries in the County for years to come. This will result in enhanced economic and social benefits for the community."

VISION FOR THE FUTURE

Collective buy-in and commitment to action is needed on the part of the private, public and non-profit sector organizations that have a stake in tourism. Developing tourism will require sustained, coordinated effort over many years and strategic investments in people and capital. The pay-off will be a strong tourism industry that provides sustainable benefits to the community for many years to come.

10 YEAR VISION

By 2030, Strathcona County will be known as a place where visitors can come to enjoy compelling nature-based offerings, authentic agritourism activities, immersive cultural experiences, and engaging events.

STRATHCONA COUNTY'S COMPETITIVE ADVANTAGE

"Strathcona County is a safe, welcoming and clean community that offers access to big city amenities while maintaining a distinctive rural atmosphere. It is the home base of adventure in the Edmonton region for those who want to stay in a smaller centre while enjoying excellent nature-based activities, a hip urban vibe, outstanding shopping, high quality sporting events and a wide variety of cultural experiences."

WHAT WILL BE HAPPENING BY 2025?

At the halfway point of executing the strategy, the following will be happening:

- There is a clear framework, organizational structure and funding model in place to support sustainable tourism development in Strathcona County.
- Visitors are excited about new and emerging visitor experiences available in Strathcona County.
- Tourism is recognized by the community and key stakeholders as an important mechanism in diversifying the local economy.
- Strathcona County has a compelling and unique tourism brand that sets it apart as a destination.
- Regional partners are being engaged in collaborative initiatives to achieve mutual tourism objectives.

WHAT WILL BE HAPPENING BY 2030?

- There is a significant increase in tourism product available to visitors, including nature-based experiences, agritourism activities, cultural experiences and festivals and events.
- Strathcona County is known as a place to come for high quality, sustainable visitor experiences.
- Strathcona County's tourism development system is sustainable, and the industry is poised for future growth.
- There are clear economic and social benefits that have quantified the return on investment in tourism.

MARKET STRATEGY AND TARGET MARKETS

Strathcona County will employ a product development strategy moving forward. This strategy will primarily consist of the development of highly engaging tourism experiences tailored to each of the identified target markets. Strathcona County is in an advantageous position as there are strong existing markets and a high quality base of tourism assets from which to build upon. What is needed now is to develop compelling experiences that are attractive to visitor markets. This will lead to increased visitation and spending in the County.

Taking into account visitor data found in this plan, and considering what inspires travel to Strathcona County, the following target markets have been identified for the strategy.

1. *Overnight visitors from eastern and northeastern Alberta, and western and northwestern Saskatchewan travelling to Strathcona County to access regional services, explore area attractions and enjoy the small city atmosphere while being close to big city amenities.*
2. *Day-trippers from Edmonton and area seeking to immerse themselves in Strathcona County's natural landscapes, agritourism experiences, hip urban vibe, and authentic culture.*
3. *Event goers from Alberta and other Canadian provinces who are drawn to Strathcona County for high quality sporting competitions, cultural festivals and other events.*
4. *Visiting friends and relatives travelling to Strathcona County and the neighbouring communities who are looking to connect with their hosts through the County's authentic experiences.*
5. *International visitors seeking to immerse themselves in niche Alberta-based experiences, such as dark sky/northern lights viewing, eco-tourism, agritourism and Indigenous tourism.*

FOCUS AREAS AND GOALS

Four overarching focus areas with accompanying goals have been developed to guide the tourism strategy.

1. ORGANIZATIONAL DEVELOPMENT

Goal: *Build organizational capacity to ensure sustainable tourism development in Strathcona County.*

2. DESTINATION DEVELOPMENT

Goal: *Enhance the capacity of the community to develop into a compelling destination.*

3. PRODUCT DEVELOPMENT

Goal: *Develop highly engaging tourism experiences to attract visitors to Strathcona County.*

Six product development streams have been identified through the strategic planning process which show the greatest potential for development in the near-term. These streams include:

1. Nature-Based and Outdoor Experiences
2. Agritourism and Culinary Experiences
3. Sport Tourism
4. Festivals and Events
5. Cultural Tourism
6. Visiting Friends and Relatives Tourism

4. MARKETING & PROMOTIONAL DEVELOPMENT

Goal: *Expand the destination's understanding of its visitors and entice travellers to visit by promoting the region's experiences to key target markets.*

IMPLEMENTATION FRAMEWORK

An implementation framework has been developed to support the tourism strategy. The framework identifies an organizational structure, roles, and funding mechanisms for tourism development in Strathcona County.

ROLES IN IMPLEMENTATION

Strathcona County – Takes the lead role in ensuring the strategy is moving forward in the most effective and cohesive manner in the near term. The County will enhance the capacity of its Economic Development and Tourism Department to deliver on destination management and marketing activities.

Tourism Strategy Task Force – A multi-stakeholder group that acts as a forum for consistent communication, collaboration and idea sharing related to the implementation of the strategy.

Stakeholder Groups – Stakeholder groups (e.g. local businesses, organizations, engaged citizens, etc.) will play a key role in growing tourism in Strathcona County. Businesses must be actively engaged in implementing the strategy and need to be more involved in tourism development than they currently are.

ACTION PLAN AND PERFORMANCE MEASURES

The action plan contains 76 action items, grouped into 24 separate priority initiatives across the overarching focus areas for the strategy. Performance measures have also been developed for the strategy. Concerted effort will be required from the business community, governments, NGO's, and residents to achieve the goals put forward by this strategic plan.

4 Overarching Goals

24 Priority Areas

76 Action Items

The top 10 action items to focus on in the near-term include:

1. Obtain formal commitment from Strathcona County and other key stakeholders to implement the Tourism Strategy and Implementation Plan.
2. Allocate resources to implement the Tourism Strategy and Implementation Plan. Wherever feasible, resources should be leveraged between multiple partner organizations to build collaboration between stakeholders.
3. Establish a Host Organization and Tourism Strategy Task Force who will collaborate on implementing the Tourism Strategy and Implementation Plan.
4. Deliver presentations to the Boards of key stakeholder organizations to encourage collaboration on the implementation of the Tourism Strategy and Implementation Plan.
5. Host a tourism planning forum with stakeholders to kick off strategy implementation.
6. Develop a Tourism Threat Identification, Mitigation and Response Plan in response to COVID-19.
7. Assess the needs of local tourism operators and tourism-related businesses and provide educational opportunities to increase their capacity.
8. Conduct a feasibility study for the establishment of a Destination Management Organization in Strathcona County.
9. Develop a Tourism Product Development Plan that will increase the number of market ready experiences that appeal to key visitor markets.
10. Establish a clear and compelling tourism brand for Strathcona County.

CONCLUSION

This document lays out a strategic direction that will advance Strathcona County toward its vision to become known as an exciting tourism destination. The County is in the early stages of development, but key indicators signal that the community is ready to capitalize on tourism growth.

The strategy will require a high degree of collaboration and significant investment between multiple stakeholders to be successful. It is only through cooperation that the community will achieve its vision and build a competitive destination in the long-term. By coming together as a team and committing to tourism development, the future will include a high quality of life for residents, strong income for businesses and a diversified economy.

1 PROJECT OVERVIEW

COMMUNITY OVERVIEW

Strathcona County is a safe, dynamic and welcoming community that attracts people of all ages, cultures and walks-of-life. It is a specialized municipality situated in the Edmonton Capital Region and Alberta's Industrial Heartland. The community offers a unique mix of urban amenities and rural atmosphere.

It is clear that Strathcona County has significant tourism assets, including access to an international airport, strong ground transportation links, proximity to an urban market of 1.2 million people, an attractive nature-based offering, established sport tourism activity, an emerging agritourism cluster, and compelling special events. If developed effectively, tourism has the potential to have a significant diversifying effect on the economic base of Strathcona County. As tourism develops, the benefits will be realized by other sectors of the economy, including oil and gas, transportation, food and beverage, accommodations, retail, recreation and others. Tourism is an industry of industries that Strathcona County can leverage for economic growth now and in the future.

PROJECT PURPOSE

Strathcona County commissioned this study to review the current state of tourism in the community and develop a strategy for its future development. The purpose of the strategy is to provide a shared vision for tourism in Strathcona County, a framework for stakeholders to collaborate, and a direction for tourism development over the next 10 years.

PROCESS

The project had five, interconnected phases as described below.

STEERING COMMITTEE

The Steering Committee was established to oversee the project and provide input and direction to the project. Below is a list of Steering Committee representatives.

STEERING COMMITTEE	
Organization	**Representatives**
Strathcona County	Shane Olson – Manager, Commercial Development Richard MacDonald – Small Business and Tourism Specialist Russ Pawlyk – Director, Recreation, Parks and Culture Suzanne Lobb – Manager, Outdoor Services, Programs and Planning
Sherwood Park and District Chamber of Commerce	Todd Banks – Executive Director
Four Points by Sheraton, Marriott Townplace Suites	Jaspreet Bhatia – General Manager
The Keg	Michael Callihoo – General Manager
Barr Estate Winery	Rick Barr – Owner
Beaver Hills Biosphere	Brian Ilnicki – Executive Director
Strathcona County Heritage Foundation	Coral Dorosh - President
Consulting Team	
Expedition Management Consulting Ltd.	Justin Rousseau – Managing Director Maxwell Harrison – Senior Associate Drew Ziegler – Senior Associate Morgan Westcott – Tourism Industry Development Specialist Robert Chappell – Sustainable Tourism Specialists Erin Pote – Stakeholder Engagement Specialist Breanna Hives – Graphic Designer

OVERVIEW OF RESEARCH

A variety of primary and secondary research activities were conducted to develop this report. Primary research was gathered through facilitated sessions with stakeholders and Strathcona County staff, online surveys of residents and stakeholders, one-on-one interviews with stakeholders, and a public engagement station at Millennium Place. Secondary research was gathered from information requests of the Client, a review of relevant literature, and local, regional, provincial and national data sources. A list of research activities undertaken and organizations consulted during the project is provided in Appendix A.

2 CASE FOR INVESTMENT IN TOURISM

There are many economic and community benefits to be gained through investment in tourism. This section provides a definition of what tourism is, as well as a brief overview of the benefits tourism can bring to Strathcona County.

WHAT IS TOURISM?

Tourism is a dynamic and competitive industry that has no universally accepted definition. For the purposes of this report, tourism can be broadly defined as:[1]

> ***"The activities of people travelling to places outside their usual environment for leisure, business or other purposes for not more than one consecutive year."***

Using the North American Industry Classification System, we can further define tourism as an economic sector made up of the following five industries: Accommodations, Food & Beverage, Recreation & Entertainment, Transportation, and Travel Services.

ALBERTA'S TOURISM INDUSTRY

Alberta's tourism industry is often referred to as an "industry of industries." It is comprised of all businesses, organizations and individuals that provide services and experiences to travellers. Tourism plays a vital role in the continuing economic success and development of Alberta and makes a significant contribution to the economic and social vitality of communities throughout the province.[2] Specifically, tourism has significant strategic value to the province and Strathcona County for the following reasons:[3]

- **Tourism is an economic platform** – tourism crosses many sub sectors (transportation, food and beverage, recreation, culture) and has a broad and diversifying effect on the economic base of the province. A significant number of tourism operators are small and medium-sized businesses with many being family owned and operated.

- **Tourism has growth potential** – research has demonstrated that both domestic and international visitors have an increasing, and strong interest in visiting Alberta destinations.

- **Tourism is part of the rural development agenda** – many communities see the potential to grow tourism as part of their plans to diversify their local economy. Festivals and events, agritourism and nature-based tourism offer great opportunities for the development of new products in rural areas, such as those in Strathcona County.

- **Tourism contributes to the awareness and positive image of communities in the global marketplace** – tourism can enhance the reputation and awareness of communities on a worldwide basis. Tourists are potential investors and can become valuable ambassadors for business development and talent attraction in Strathcona County.

ECONOMIC BENEFITS OF TOURISM

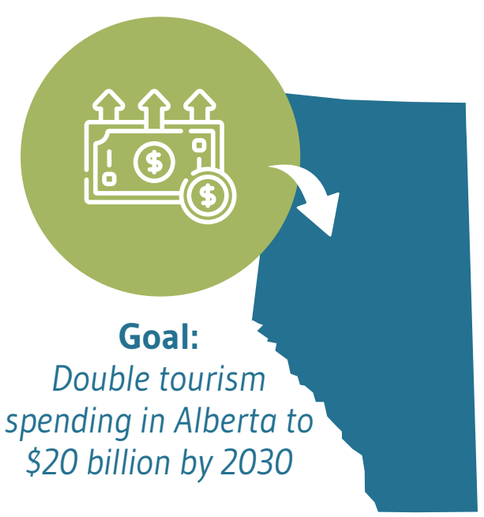
There are many economic benefits of tourism as tourism brings visitor dollars into Strathcona County. Visitor spending is "new" money that then circulates throughout the local economy, multiplying its benefit. Additionally, tourism can expose Strathcona County to potential investors and homeowners. In some cases, tourists enjoy their visit so much that they choose to stay.

The tourism industry is a significant economic driver throughout the Province. The tourism industry in Alberta:[4]

- Generates **$8.9 billion** in direct visitor spending.
- Supports **22,196 tourism businesses.**
- Sustains over **127,000 jobs** province-wide.
- Generates **billions** in total tax revenue for municipalities, the province and the federal government.

PROVINCIAL TOURISM GOAL (2030)

The Government of Alberta has set an ambitious goal to double tourism spending in Alberta to $20 billion by 2030.[5] To achieve this goal, new destinations will need to be developed to attract visitors and increase spending in the Province. Strathcona County could be one of the destinations that will help achieve this broader goal.



Goal:
Double tourism spending in Alberta to $20 billion by 2030

THE VISITOR ECONOMY

The visitor economy refers to the widespread and often unseen benefits Strathcona County receives from dollars spent by travellers. Tourism is more than just a business sector; it is an economic driver that crosses multiple industries and supports growth in multiple ways. Here is an illustration:[6]

A family from California travels to an Alberta ranch to take part in a cattle drive. They take a flight, rent a car, stay in a local accommodation and rent or buy equipment. This is the "direct" impact of the visitor economy: local businesses receive money from tourism spending.

As a result of this spending, the business offering the cattle drive experience is able to make a profit and hire more staff. This "indirect" impact of tourism spending produces a multiplying effect as an economic driver by increasing wages, salaries, profits and other business costs. Also, as more visitors come to the ranch, more work is generated in the supply chain, as wholesalers, food and beverage suppliers, tour planners, retailers, manufacturers, etc., are called upon to meet customers' demands.

The new employees hired by the ranch now have money to spend on clothes, food, transportation, entertainment and to pay taxes. This is the "induced" impact of the visitor economy.

The ripple or spillover effects of this induced impact are felt as income, and taxes are spent throughout the province on housing, education, transportation, infrastructure, energy, communication, heath care and other personal expenditures.

The end result is that tourism dollars circulate throughout the economy, amplifying their impact along the way, resulting in support for community building and economic well-being.

COMMUNITY BENEFITS OF TOURISM

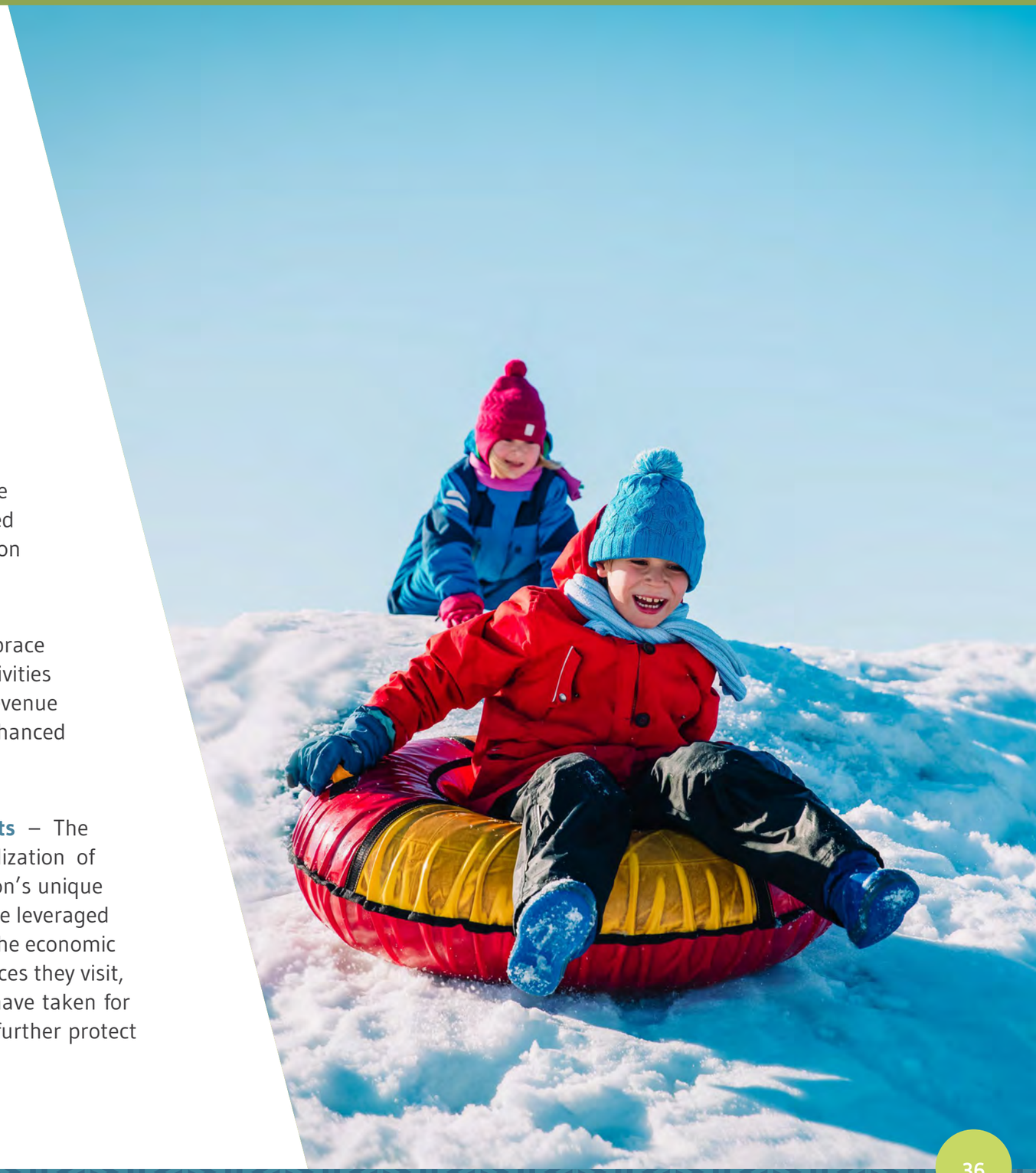
Tourism has the potential to provide compelling community benefits for Strathcona County, as well. While the benefits are multiple and varied, tourism can provide the following:[7]

A source of community pride – Celebrating local culture and sharing it with the world can be a significant source of pride for communities, individuals and cultures.

Capacity to encourage community engagement – Tourism can provide opportunities for individuals within the community to become engaged through business, volunteerism, event/activity execution and interpretation of local culture.

Enhancements to the quality of life for residents – Communities that embrace tourism can often justify enhancements to infrastructure, events and activities well beyond what could be achieved without a stable source of external revenue flowing into the community. Local community members benefit from enhanced amenities.

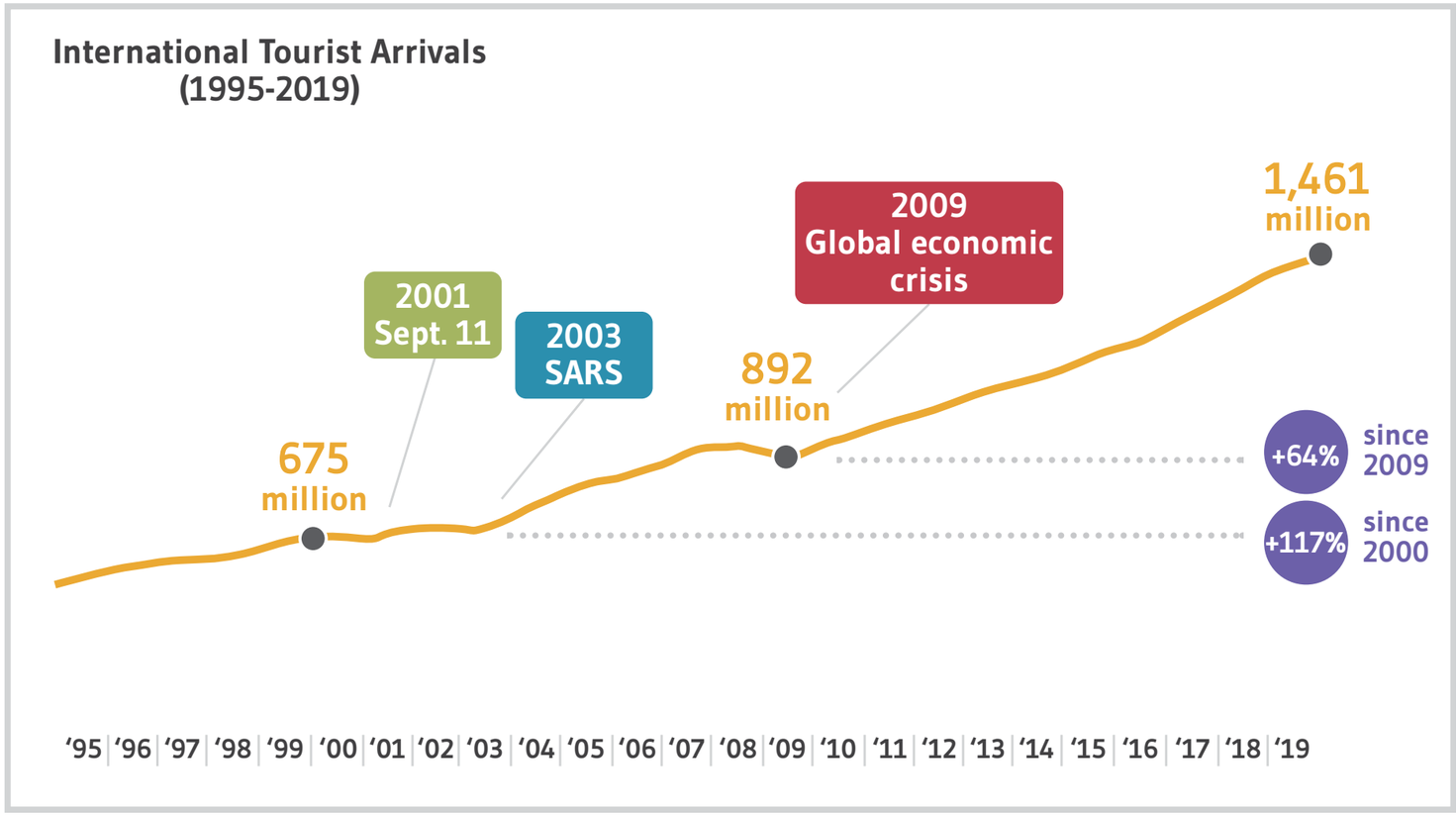
Preservation and Enhancement of Built and Natural Environments – The tourism industry can also contribute to the preservation and revitalization of built and natural environments in Strathcona County. When a destination's unique characteristics (e.g. special landscapes, authentic culture, history, etc.) are leveraged as tourism products, they acquire an enhanced value that goes beyond the economic considerations. Travellers experience an emotional connection to the places they visit, while residents find a newfound significance for things that they may have taken for granted before. The addition of such values provides the motivation to further protect significant community assets and, in some cases, enhance them.



RESILIENCY OF TOURISM

As a global industry, tourism has a strong history of growth and has been proven to be resilient through significant crises and events. International tourism has seen continued expansion over the past few decades, despite occasional shocks. In the past 20 years, international tourist arrivals have risen from 675 million in 2000 to 1.5 billion today. This dramatic growth demonstrates the sector's strength and resilience (see Figure 1).[8]

Figure 1. Global Tourism Growth and Resiliency Through Economic Shocks



Source: UNWTO

WHY INVEST?

Strathcona County already experiences some of the benefits of the tourism industry. The County's strategic location, strong support from stakeholder groups, and a multitude of assets presents a significant opportunity for tourism development. A strategic investment now will help tourism flourish and support other industries in the County for years to come. This will result in enhanced economic and social benefits for the community. A conceptual model of how these benefits come to be is provided in the Destination Management Cycle (see below).

A strategic investment now will help tourism flourish and support other industries in the County for years to come. This will result in enhanced economic and social benefits for the community.

THE DESTINATION MANAGEMENT CYCLE

Source: Travel Alberta. (2018).

Tourism can play a key role in talent attraction and the broader economic development goals of communities.

3 TOURISM TRENDS

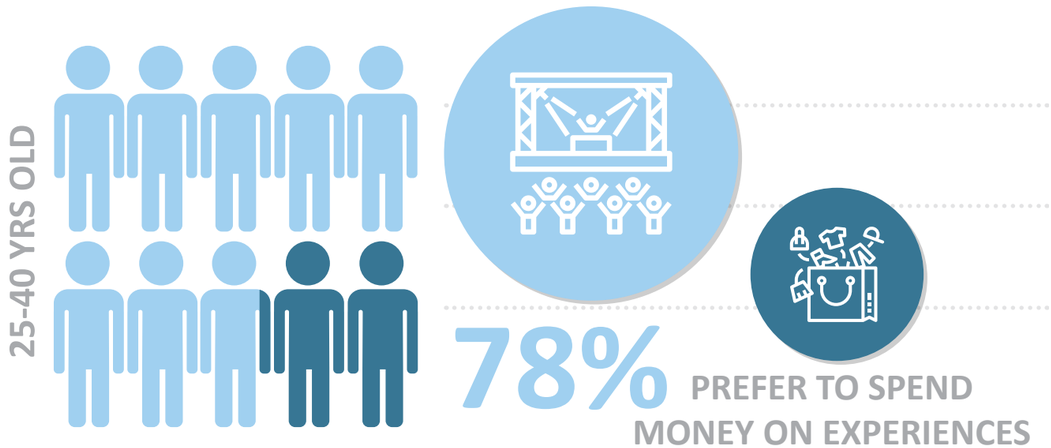
Broad tourism trends at the provincial, national and international levels are considered in this section. The findings from this research was used to inform the strategic planning process overall.

DRAMATIC GROWTH IN TOURISM WORLD-WIDE

The world has experienced dramatic growth in terms of travel and tourism. Tourism is currently one of the largest industries in the world. For example, in 2016, travel and tourism accounted for 10% of the world's GDP ($2.3 trillion).[9] Tourism's contribution to global GDP was higher than banking, mining, agriculture or construction. When the indirect and induced impacts of the visitor economy are considered, tourism generated $7.6 trillion and accounted for 1 in 10 jobs on a world-wide basis.

Tourism is one of the largest industries in the world.

EXPERIENCES VS MATERIAL GOODS



Visitors are seeking experiential tourism products that connect them to the people and places they visit.

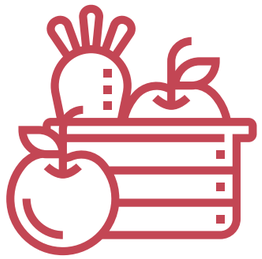
Today's visitors are seeking experiential tourism products that connect them to the people and places they visit. One of the biggest recent shifts in consumer behaviour has been the prioritization of experiences over material goods. According to a 2015 study published in Forbes magazine, 78% of people between the ages of 25-40 prefer to spend money on an experience over a material possession.[10] This growth in experiences is aligned with an increased desire to share experiences with others. In a Forbes survey, 69% of respondents said they believe attending live experiences helps them connect better with their friends, their community and people around the world, while 72% indicated they would like to spend more on experiences in coming years.[11]

DIGITAL TRAVELLERS

Over the past decade, the world has undergone a significant digital transformation. According to some estimates, by 2021, more than 26% of leisure travellers and 20% of business travellers globally will be "mobile only," operating with smartphones and tablets, rather than laptop or desktop computers.[12] These digitally connected travellers can research and purchase travel 24/7 through the internet, and they demand strong connectivity, even in rural or remote places. Destinations will need to have the infrastructure in place to ensure strong connectivity in order to attract the visitors of the future.

LOCALISM

Consumers are embracing products that have local credentials or claims as they consider these products to be better quality, healthier, more sustainable, and more authentic.[13] Examples of these products include craft beer, farm-to-table offerings, and local festivals that highlight community values. Visitors are seeking immersive experiences that allow them to "live like a local," if only for a short period of time.



DESTINATION STEWARDSHIP

According to Destinations International's 2019 Futures Study, the most significant shift overall for destination organizations worldwide is the expanding role from solely destination marketing to destination management.[14] Today, destination organizations are focusing more intentionally on developing new destination experiences and stakeholder networks that incorporate a wider breadth of local companies and organizations, including those outside tourism and hospitality.

"Destination management addresses the interactions between visitors, the industry that serves them, the community that hosts them, and the environment (natural, built and cultural)."

- UNWTO, 2019

COMMUNITY ALIGNMENT

The most effective destinations have the support of government officials and area residents who believe that the visitor economy positively impacts their community and elevates their overall quality of life. Building coalitions between the public and private sectors to move a destination toward a common goal can be challenging due to the variety of audiences and agendas. However, the powerful benefits of community alignment are well worth the effort. When government, businesses and residents agree on the value of the visitor economy, then it is much easier to build support for new initiatives that will grow tourism.[15]

When government, businesses and residents agree on the value of the visitor economy, then it is much easier to build support for new initiatives that will grow tourism.

TOURISM GROWTH AND SUSTAINABILITY

Globally, greater attention is being paid to the sustainability of the tourism sector. In this case, sustainability refers to the environmental, economic, and socio-cultural aspects of tourism development. A suitable balance must be established between these three dimensions to promote long-term sustainability. Increasingly, destinations are realizing that their efforts to grow tourism must be pursued within the wider context of the economic, social and environmental needs of their communities. According to UNWTO, sustainable tourism should:[16]

1. Make optimal use of environmental resources while maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to intercultural understanding and tolerance.
3. Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building.

4 DESTINATION ANALYSIS

SWOT ANALYSIS

This section provides the findings from the Destination Analysis, including the results from a SWOT/STEEP analysis, strategic alignment analysis, tourism service delivery analysis, tourism asset inventory, and community engagement results.

SWOT AND STEEP ANALYSIS

A high-level analysis of Strathcona County's strengths, weaknesses, opportunities and threats (SWOT), as well as the social, technological, economic, environmental and political factors impacting tourism (STEEP), was completed to support the strategic planning process. The key findings from this analysis are provided below.

STRENGTHS	WEAKNESSES
• Safe, welcoming community that combines urban amenities with a distinct, rural atmosphere. • Strategic location with proximity to large urban markets and Edmonton International Airport. • Strong highway access with linkages to Highway 16. • Strong supply of natural attractions and outdoor recreation opportunities with over 1,500 hectares of natural areas, 1,900 hectares of parkland, and 229 kilometers of trails. • Strong supply of fixed-roof accommodation providers. There are currently 1,375 rooms in Strathcona County. • High-quality community and sports facilities. • Proven experience delivering high-quality sport tourism events (e.g. 2007 Summer Games, 2017 55+ Summer Games). • Strong interest from local businesses and other stakeholders to develop tourism. • Compelling community history as a specialized municipality with strong connections to Alberta's Industrial Heartland.	• Underdeveloped tourism support system and organizational capacity to develop tourism. • Lack of a defined tourism brand. • Lack of market-ready tourism products. • Lack of market awareness of what the County has to offer to visitors. • Lack of visitor data and understanding of target markets. • Lack of a consolidated, comprehensive and engaging tourism website that houses all visitor information in one place. • Lack of community awareness about the benefits of tourism. • High cost of insurance for some tourism operators.

OPPORTUNITIES	THREATS
• Organizing the community and key stakeholders to take a coordinated approach to tourism development. This factor is often crucial in achieving sustainable growth.[17] • Developing key assets into market-ready tourism products for visitors (e.g. community/sport facilities, natural attractions like the Beaver Hills Biosphere, festivals and events, culture and heritage, agricultural operators, culinary offerings, Alberta's Industrial Heartland). • Leveraging tourism to improve the social, economic and environmental future of the community. Studies have shown a positive relationship between the development of tourism and increased quality of life for residents.[18] • Capitalize on the "farm-to-table" trend. • Collaborating regionally with municipalities and individual attractions to drive visitation to the County. • Leveraging grant funding for destination development and tourism marketing. • Supporting the County's core economic sectors through tourism. • Leveraging community and tourism assets to benefits residents and visitors alike.	• Competition for limited investment and development resources within Strathcona County. • Competition for development and marketing funds from provincial tourism organizations (e.g. Travel Alberta, Alberta Economic Development, Trade and Tourism, Indigenous Tourism Alberta). • Competition for visitors from other destinations. • Slow pace of economic recovery. • Environmental threats, including natural disasters, climate change impacts and pandemics. • Reputation of Alberta on the global stage.

THE IMPACT OF COVID-19

The COVID-19 crisis is unprecedented and tourism has been one of the most negatively affected sectors.[19] As the world responds to and recovers from this global health emergency, there is a good chance that the tourism sector will need to evolve. The full impacts of the crisis cannot be known at this time, although, at the time of writing this report, it appears clear that significant recovery efforts will be needed. The direction put forward in this document should be adjusted as necessary to respond to the most pressing future needs. Sound planning, preparation and strategic investment will put the County in a position to begin to rebound from this tremendous economic and social shock.

STEEP ANALYSIS

SOCIAL

Strathcona County should consider both positive and negative social factors that can be generated through tourism development. For example, tourism can drive an influx of visitors who stay in the community periodically throughout the year. This can contribute to rising costs of living for residents. Other social impacts, such as vehicle congestion, crowding or loss of authenticity, can lead to conflicts with residents. Conversely, well-planned tourism development can add significant social value to the community through enhanced services and infrastructure that both residents and visitors can enjoy.

TECHNOLOGICAL

Internet connectivity is of vital importance to modern visitors. They expect WiFi in urban areas and to have cell reception at all times, even in wilderness zones. Also, the rise of peer-to-peer networks like Airbnb and Uber are disrupting traditional sectors of the economy, such as accommodation and transportation. In addition, the provision of high quality, informative and engaging digital information is an expectation of all destinations in today's digitally connected world. Tourism organizations in Strathcona County must watch these technological changes closely and adjust as needed to meet visitor expectations.

ECONOMIC

Globally, tourism has had ten consecutive year of growth, and international tourism outpaced growth in the broader global economy.[20] These findings confirm tourism as a leading and resilient economic sector on the global stage. At the national level, Canada has experienced its third consecutive record-breaking year in terms of tourism. In 2019, tourism generated an estimated $104.9 billion in tourism expenditures, supported approximately 1 in 10 jobs in communities across Canada and contributed an estimated $43.5 billion in Gross Domestic Product.[21]

At the provincial level, the economy is still recovering from a recession. There have been some promising economic indicators, although the economy is still weathering shocks from periodic drops in oil prices. The current economic situation has left many people searching for answers to maintain their quality of life. In previous downturns, there was a belief by many that there would be a swift bounce back and that the downturn was a good time to do planning before the next economic upswing. However, there is now a growing consensus that Alberta, and the global economy, are in a new reality of lower resource revenues. The effects of lower resource revenues are currently being felt in Strathcona County. For example, according to data presented by the Alberta Hotel and Lodging Association in March of 2020, the year to date hotel occupancy for Sherwood Park was as low as 38.4% in 2019.[22]

The weakened provincial economy has the potential to reduce visitation originating from within Alberta. However, the relatively weak Canadian dollar encourages staycations from other domestic travellers. The low dollar also makes Canada a more attractive destination for international travellers, as foreigners can stretch their money further, resulting in longer stays and more spending.

ENVIRONMENTAL

The Earth's changing climate impacts the tourism sector. Larger and more frequent wildfires can increase the risk of property damage. They also lead to more smoke in the atmosphere, which increases the risk of respiratory problems and detracts from the visitor experience during the summer months. Changes in precipitation can have impacts, as well (e.g. lack of snow in the winter, increased risk of flooding in the spring, etc.). Additionally, there is a chance of increased incidences of human-wildlife interactions due to changes in animal habitats and as more wilderness areas become accessible to visitors.

Another environmental consideration are the impacts caused by outbreaks of diseases and viruses. Outbreaks like the recent COVID-19 virus have the potential to lead to mass disruptions in societies and economies. Freely moving travellers can become powerful vectors for disease transmission, which could increase the risk of having localized outbreaks develop into global pandemics.

POLITICAL

Regulations and policies from all three levels of government have significant impact on the tourism industry. Provincial and federal governments currently support tourism development and have identified the sector as a priority area for development. However, this situation is open to change, depending on the priorities of future governments. The availability of government grants and the impacts of regulation are important factors to consider when planning for future tourism development (e.g. land management, development approvals, short-term accommodation regulations, cannabis regulations, etc.).

Broader political movements also impact tourism. Contentious situations, such as Brexit, traveller bans from the U.S., and general political unrest can be a significant detractor to visitation. Although, Canada's relative stability in comparison to many destinations provides it with an opportunity to win greater market share of international travellers.

STRATEGIC ALIGNMENT ANALYSIS

Investment has been made by Strathcona County, stakeholder groups, and other levels of government in plans and policies that can impact tourism development in the County. The development of a Strathcona County Tourism Strategy and Implementation Plan was found to be in alignment with several existing strategies and plans. Figure 2 provides a summary of key linkages related to the project.

Figure 2. Strategic Alignment of Tourism Development in Strathcona County

Strathcona County Strategic Plan 2013-2030[23]

Outlines key goals for the County including:

- Cultivate economic diversification, within the petro-chemical industry and beyond, through a business-friendly environment.
- Foster collaboration through regional, community and governmental partnerships.
- Provide facilities and services that are available and accessible to residents.

Strathcona County Economic Development and Tourism Department Business Plan 2019-2022[24]

- Commit to enabling the success and growth of business and industry in Strathcona County through business and investment attraction, business retention and expansion, and entrepreneurial support.

Strathcona County Recreation and Culture Strategy[25]

- Prioritize recreation and culture opportunities be made available to all, making Strathcona County Canada's most livable community.

Beaver Hills Strategic Plan[26]

- Emphasize working together for a sustainable region, through shared initiatives and collaborative action.

Strathcona County Agriculture Master Plan[27]

- Put forward actions to create awareness among Strathcona County's residents and attract them to local markets, local food opportunities and events.
- Put forward actions to encourage rural stakeholders to develop a Strathcona County Agri-Tour that would include a multi-stop route with a range of experiences and offerings.

Strathcona County Municipal Development Plan[28]

Strathcona County will support opportunities for tourism by encouraging:

- Nature-based and agritourism development
- Tourism developments for all four seasons
- Outdoor festivals and the creation of new regional parks
- Heritage/cultural tourism development

Regional Agriculture Master Plan[29]

- Need to remove barriers to enable growth in value-added agriculture operations such as agritourism.
- Adopt and implement an economic development plan that can stimulate the regional food and agriculture industry.

Edmonton Metropolitan Region Growth Plan[30]

- Identify and promote opportunities for tourism and recreation including planning and developing recreation corridors throughout and beyond the Region.
- Pursue the diversification of the agricultural sector through agritourism.

Travel Alberta Business and Marketing Plan 2018-2020[31]

- Aim to support economic diversification throughout the province by strengthening awareness of the value of the visitor economy.

Placeholder for Alberta Provincial Tourism Strategy

The provincial tourism strategy is set to be released in Spring of 2020. Relevant strategic alignments will be included in future versions of the strategy.

Creating Middle Class Jobs: A Federal Tourism Growth Strategy 2019[32]

- Support three pillars, including: building tourism in Canada's communities, attracting investment to the visitor economy, and a renewed focus on public-private collaboration.

Destination Canada Corporate Plan 2019-2023[33]

- Focus on increasing demand for Canada with innovative marketing for leisure tourism and business events.

TOURISM SERVICE DELIVERY ANALYSIS

There are several organizations that contribute to tourism development in Strathcona County. However, their efforts lack a coordinated system for developing and delivering tourism in the area. This has resulted in limited tourism development. The discussion below describes which organizations are currently providing tourism services.

Economic Development and Tourism Department (Strathcona County) – The Economic Development and Tourism (EDT) department is committed to enabling the success and growth of business and industry in Strathcona County, which includes tourism.[34] The department does this through business and investment attraction, business retention and expansion, and entrepreneurial support. The Department also provides tourism-related information and marketing services, including print advertising, social media boosts and publishing of an activity and travel guide that contains information for residents and visitors. EDT assists in the delivery of events that have tourism value, as well.

Recreation, Parks and Culture Department (Strathcona County) – Through the Recreation, Parks and Culture (RPC) department, Strathcona County invests in municipal programs and services that benefit residents and visitors (e.g. recreation facilities, public parks, trails, festivals and events, etc.). The RPC department has achieved strong results in attracting and delivering sport tourism events in the community.

Sherwood Park and District Chamber of Commerce – The Chamber of Commerce is a member-based organization that supports and leads the business community in Strathcona County. It works with its members to create an environment for the Sherwood Park and District business community to succeed. The Chamber produces close to 80 events annually, some of which attract visitors from outside the community (e.g. Canada Day Parade, Great Canadian Trade Fair). The Chamber also runs a seasonally staffed visitor information booth at its main office location.

Go East of Edmonton – Go East is a regional tourism organization that partners with private businesses, non-profits and government organizations to promote the region east of Edmonton to key visitor markets. It maintains the tourism website https://goeastofedmonton.com/, which is its primary channel for advertising and promotion.

TOURISM ASSET INVENTORY

Strathcona County's tourism assets were inventoried as part of this project. The following section summarizes the key findings.

The tourism asset inventory recorded 195 assets across 12 tourism product categories. For each asset, the inventory identified the following information (where available):

- Asset Name
- Location (including street address, community, postal code, and accompanying directions)
- Description of the Product Offering
- Market Readiness (see Appendix B for a description of market ready standards)

The number of assets recorded for each category is shown in Figure 3. A summary of the assets identified in each category is provided in Appendix C. To view the full asset inventory in Excel format, please follow this link.

Figure 3. Number of Assets per Category

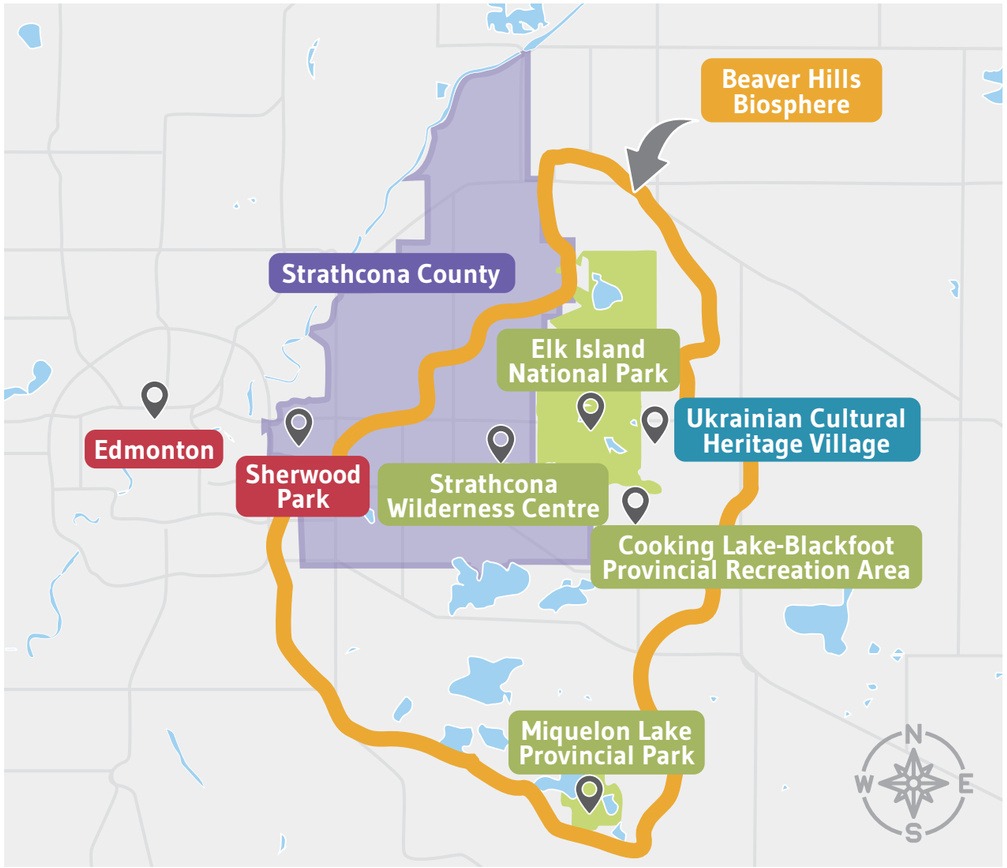
ASSET INVENTORY CATEGORY	NUMBER OF ASSETS IDENTIFIED
Agricultural Attractions	25
Cultural-Heritage Attractions	9
Culinary Attractions	37
Natural Attractions	11
Festivals and Events	Small/Local (31) Large/Regional (10)
Tour Operators	2
Specialty Shops	9
Community and Sports Facilities	25
Entertainment Facilities	7
Accommodations	13 (1375 rooms)
Campgrounds	7 (478 sites)
Meetings and Conventions	9
Total Number of Assets	**195**

As a result of the asset inventory process, we have identified strengths and gaps in the tourism product offering that is currently available to visitors and residents.

TOURISM PRODUCT STRENGTHS:

Natural Attractions – Strathcona County is fortunate to have access to outstanding natural assets that have the potential to provide a compelling nature-based tourism offering. For example, the Beaver Hills Biosphere is an official UNESCO Biosphere Reserve and it contains popular attractions, such as Elk Island National Park, Miquelon Lake Provincial Park, the Cooking Lake-Blackfoot Provincial Recreation Area, the Ukrainian Cultural Heritage Village, and the Strathcona Wilderness Centre. The North Saskatchewan River can also be accessed from the County and presents an outstanding opportunity for nature-based activities. These assets make Strathcona County an excellent destination for outdoor enthusiasts.

Beaver Hills Biosphere Reserve



Agritourism Assets – Strathcona County has a number of assets that could be developed to form an agritourism cluster. There are a variety of local farms, markets and greenhouses, as well as excellent equestrian operators located in the County. Additionally, construction is proceeding on a Multi-purpose Agricultural Facility in Strathcona County, which has the potential for strong linkages to tourism.

Sport Tourism Events – Strathcona County has built a reputation as an excellent host for sporting events. There is opportunity to leverage the County's existing capacity for increased sport tourism.

Events at Festival Place – Festival Place is a performing arts theatre that showcases professional and community performing arts events, such as plays, dances and music shows. There is opportunity to enhance the offering of this asset for tourism growth.

Community and Sports Facilities – There are numerous high-quality community and sports facilities that can be further leveraged to attract festivals, events, competitions and meetings which can bring in more visitors.

Cultural Attractions and Events – Strathcona County has a strong supply of cultural-heritage attractions, including Sherwood Park's Heritage Mile, Bremner House, Smeltzer House, a variety of art galleries, and proximity to the Ukrainian Cultural Heritage Village. The unique offerings of these attractions can be leveraged for tourism growth.

Accommodations – There is a strong supply of fixed roof accommodation providers in Strathcona County. Many of these businesses are established brands who can offer market ready services to visitors.

TOURISM PRODUCT GAPS:

Market Ready Tourism Product – Although there are some market-ready tourism products in Strathcona County today, there is an overall lack of experiences for visitors. Additional product development is needed to achieve a critical mass of tourism product that will sustainably attract visitors. This is especially true of the County's nature-based offering. Potential visitors who want to experience and learn about natural areas must navigate through a myriad of websites. Many of these sources do not provide adequate information on how these assets can be responsibly enjoyed (i.e. trail maps, access points, allowable activities, parking and other amenities, etc.). There is also a gap in nature-based tours and interpretation services. These barriers detract from the visitor experience. Significant enhancements must be made before these assets can be considered market ready and reach their full tourism potential.

Tourism-Related Programming – Strathcona County currently lacks tourism-related programming. There is an opportunity to develop itineraries, packages and other tourism-related programming that will leverage existing assets in the areas of agritourism, nature/outdoors, sport tourism, culture, and festivals and events.

Specialty Accommodations, Resorts and B&B's – There is a lack of diversity in accommodations throughout the study area. There are some unique B&B's identified in the inventory, however there are no high-end/luxury accommodations, wilderness resorts, spas or nature lodges.

Campgrounds – Campgrounds in the region have stated that they are at or near capacity during the peak summer months, indicating a lack of RV and camping opportunities. There is also a gap in terms of RV and camping support services in Strathcona County (e.g. sani-dumps).

Tourism-Focused Festivals and Events – There is a lack of unique, compelling festivals and events aimed at bringing visitors to Strathcona County. Tourism-focused festivals and events are available in neighbouring communities in the Capital Region, but less so in Strathcona County.

KEY THEMES FROM COMMUNITY ENGAGEMENT AND DESTINATION ASSESSMENT

As an input into the process, Strathcona County residents and stakeholders were engaged through a variety of consultation activities, including online surveys, one-on-one interviews and facilitated workshops. Eight key themes were synthesized by the consulting team using all of the engagement inputs received. These key themes are provided next. To review the full results of the community engagement process, please see the What We Heard Report in Appendix D.

1. STRONG SUPPORT FOR TOURISM DEVELOPMENT AMONG MANY STAKEHOLDER GROUPS

Historically, tourism has not been a focus of development efforts in Strathcona County. However, there is now strong support among numerous stakeholder groups to further develop tourism. These stakeholder groups include local businesses, community organizations, festivals and events, and government representatives. There is recognition of the potential tourism has to diversify Strathcona County's economy and positively impact the community.

2. LACK OF AWARENESS OF TOURISM AMONG SOME SEGMENTS OF THE POPULATION

Through the engagement process, there appeared to be a lack of awareness from some residents around what tourism is and what developing the industry might entail. This signifies a potential need for education on the tourism industry. Specifically, the promotion of its benefits and a clear description of how tourism relates to Strathcona County and the community's objectives.

3. NEED FOR A UNIFYING VISION

There is a need for a unifying vision for tourism development that will set the destination on a path toward sustainable growth. In general, stakeholders envisioned a local tourism industry that:

- Provides exceptional experiences that will keep visitors coming back again and again.
- Clearly differentiates Strathcona County from competing destinations.
- Diversifies the local economy and generates benefits for local businesses, residents and organizations.
- Is highly collaborative with multiple stakeholder groups contributing to its success.

4. ORGANIZING FOR TOURISM DEVELOPMENT

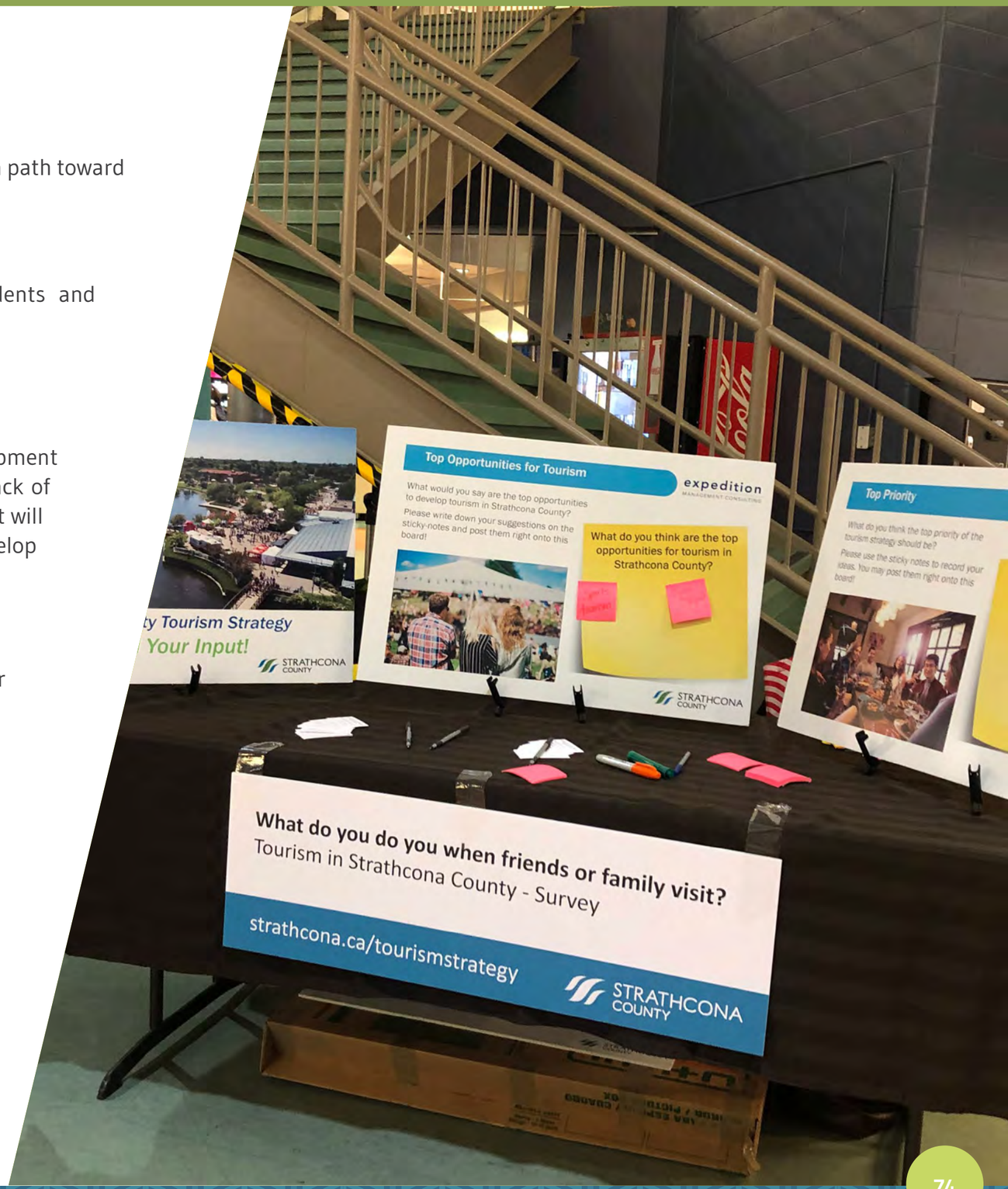
Strathcona County's tourism sector is fragmented and lacking collaboration. Tourism development and marketing activities of existing organizations are limited, often siloed and there is a lack of role clarity. There is a need to organize the community under an overarching framework that will deploy their resources, expertise and capacity in an efficient and coordinated manner to develop tourism.

5. WILLINGNESS TO COLLABORATE AND PARTNER

There is a clear sense of optimism among stakeholder groups and a desire to work together to achieve tourism objectives. For tourism to reach its full potential, multiple sectors and a broad range of stakeholders will need to be engaged. The benefits of collaboration include leveraged resources, information sharing and enhanced communication.

6. LACK OF TOURISM PRODUCTS AND OPERATORS

Residents and stakeholders identified many high quality tourism assets in Strathcona County. However, through our analysis we identified that many of these assets are currently underdeveloped and are not being packaged in a compelling way. There are limited market ready experiences available to visitors, and Strathcona County lacks anchor attractions that are positioned to differentiate the destination in the mind of visitors. Additionally, there are limited supports for tourism operators who are faced with challenges ranging from human resource issues, a lack of marketing and funding support, and other challenges.



7. OPPORTUNITIES FOR PRODUCT DEVELOPMENT

The following opportunities for product development were identified through the community engagement process, gap analysis and other research.

Nature-based Tourism – Strathcona County's special geographies, diverse environments and protected areas are recognized as key tourism assets. Attractions such as the Beaver Hills Biosphere, Strathcona Wilderness Centre, Elk Island National Park and the North Saskatchewan River Valley provide excellent opportunities to develop nature-based tourism offerings.

Sport Tourism – Strathcona County is known for delivering high quality sport tourism events. The municipality has excellent recreation assets, such as Millennium Place, Emerald Hills Sports Pavilion, Strathcona Wilderness Centre, Broadmoor Lake Park and others. Strathcona County has invested in the deployment of its Recreation, Parks and Culture Department to support sport tourism. This provides a strong foundation upon which to further develop sport tourism experiences. There are capacity issues in terms of infrastructure and human resources that must be considered through the development of the strategy.

Festivals and Events – Strathcona County hosts Canada Day, Patio Series, PlayDays throughout the year and separate community led events such as the Highland Gathering, Canadian Birkebeiner Ski Festival, numerous fun runs, tractor pulls, tradeshows and more. These events are supported by excellent indoor and outdoor spaces, such as Festival Place and Broadmoor Lake Park. In addition, the sport groups in the community are motivated to showcase their athletes and their community through regional, provincial, national and international sport competitions.

Culture and Heritage – Strathcona County has a rich and diverse history that can be leveraged to create tourism experiences. The stories of Indigenous peoples and European settlers contribute to the history of the area and would be of interest to certain traveler segments. Strathcona County also has strong links to its agricultural heritage, the energy industry and equine pursuits. Built assets, such as the Strathcona County Museums and Archives, the nearby Ukrainian Cultural Heritage Village, and the future multipurpose agricultural facility can all be utilized to a greater degree as cultural tourism attractions.

Agritourism/Culinary – There are strong agricultural roots in Strathcona County and the local agriculture industry is an important driver of the economy. There is opportunity to leverage these assets to develop authentic agritourism and culinary tourism offerings, such as farm stays or long table dinners.

Visiting Friends and Relatives – Strathcona County residents expressed strong support for increasing and enhancing tourism products that appeal to the visiting friends and relatives market (VFR). 71% of respondents to the resident survey were likely or very likely to invite their friends and family to visit within the next two years. Capitalizing on this demand is seen as a powerful way to grow tourism.

8. ENHANCED TOURISM MARKETING

Stakeholders expressed a strong desire for enhanced tourism marketing in Strathcona County. It is important for the County to have a clear tourism brand, specified target markets and coordinated marketing activities. There is a distinct opportunity to align tourism marketing activities to reach larger audiences and attract more visitors.

5 MARKET ANALYSIS

Market data on visitors to Strathcona County and the broader Edmonton region was collected and analyzed to support the strategic plan. The main findings are summarized next.

DOMESTIC TOURISM IN EDMONTON AREA TOURISM REGION (2017)[35]

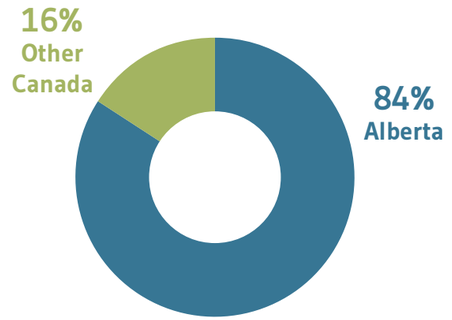
In 2017, 7.3 million visits were made by residents of Alberta and other parts of Canada to destinations in the Edmonton and area tourism region. Albertans accounted for 6.2 million (84%) of these visits, with 1.2 million person-visits (16%) originating from other parts of Canada. Overall, visits to the Edmonton area tourism region accounted for 21% of total person-visits in Alberta.

Approximately 35% of all visits included at least one overnight stop, primarily by Alberta residents. Of the 2.94 million overnight visits to the region, Central Alberta residents accounted for 20% of the visits followed by Calgary and area with 19% and northern Alberta with 15%. An additional 14% and 9% were attributed to neighbouring British Columbia and Saskatchewan, respectively.

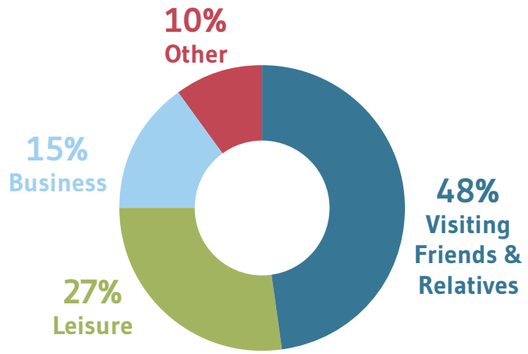
The main purpose of overnight visits was for friends and family (48%), leisure (27%), and business (15%). 55% of nights were spent in the homes of family and friends, followed by hotels, motels and other roofed accommodation (44%), and campgrounds and RV parks (1%). Domestic visitors tended to stay an average of 2.7 nights with an average party size of 2.3 people. Domestic overnight visits were primarily from July to September (29%) and October to December (27%), followed by April to June (23%) and January to March (21%).

The total direct tourism expenditures for the region was an estimated $1.885 billion, of which food and beverage accounted for the largest share (27%), followed by private vehicle/rentals (21%), retail/other (16%), accommodations (16%), public/local transportation (14%), and recreation/entertainment (6%).

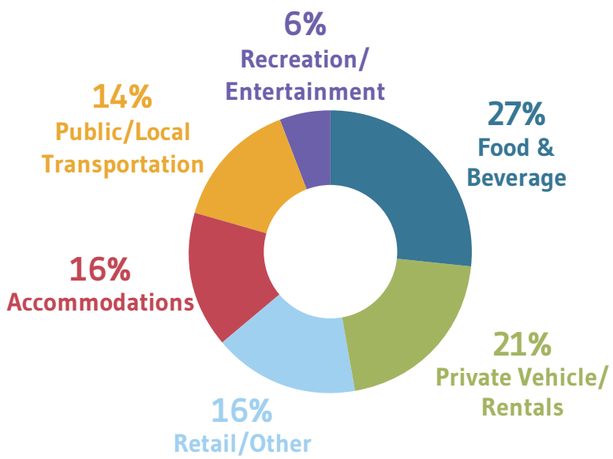
Domestic Visitation to Edmonton Area Tourism Region



Main Purpose of Trip



Visitor Spending



Traveling to visit family and friends is a significant driver for travel to the Edmonton area. In fact, "Visiting Friends and Relative (VFR) represents a considerable share of all tourism in Alberta."[36] The VFR market accounts for 43% of all in-province trips by Albertans, and VFR is the main reason for more than half of Canadians traveling to Alberta from other provinces.

Research on the VFR market in Alberta indicates that residents use their personal experience to determine what to do when friends and family visit from out of town. Planning is typically a joint effort between the hosting resident and their guests. While most hosts are involved in trip planning (80%), very few hosts plan activities in advance of their guests' arrival (15%). More often plans are made once guests arrive (23%) or both before and after guests arrive (41%).[37] Given that planning happens in the destination and is relatively spontaneous, *resident hosts rely on personal experience* to inform decisions on where to go and what to do with guests.[38]

CITY OF EDMONTON AND THE CAPITAL REGION

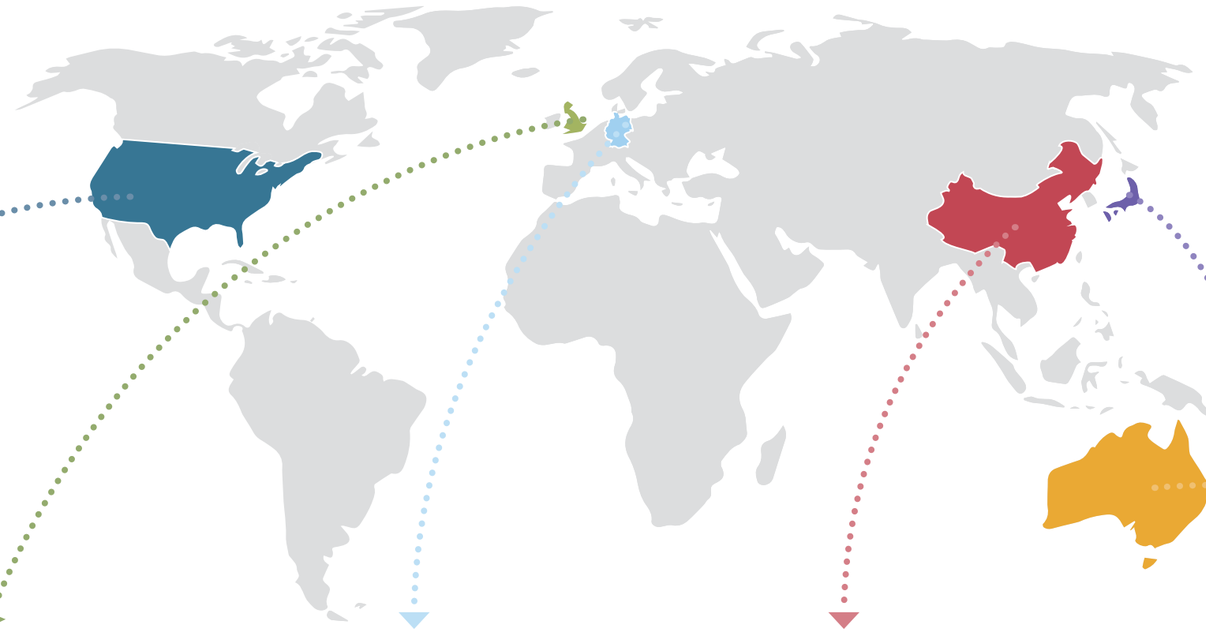
The City of Edmonton and communities in the Capital Region offer a significant market opportunity. With a population of over 1.4 million and annual domestic visitation exceeding 7.3 million, the Capital Region provides Strathcona County with access to a substantial number of potential visitors.

VISITATION TO ALBERTA (2017)*

In 2017, 36.9 million person-visits were made to destination in Alberta. Visitors primarily came from within Alberta (83%), followed by other parts of Canada (11%), overseas countries (3%), and the United States (2.6%). Alberta-based visitors were responsible for the majority of person-visits; however, this market was only responsible for 54% of total tourism expenditures. Other Canada (22.0%), overseas countries (14%) and the United States (10%) were responsible for almost half of the total tourism expenditures made in the province. Key sources of overnight inbound travel to Alberta include neighbouring provinces, the U.S. and major European and Asian markets.[39]

*Due to a change in the quality of data from Statistics Canada, starting in 2015 the Alberta government only provides analysis for international visitation to Alberta on a province-wide basis.

INTERNATIONAL MARKETS



UNITED STATES

- The United States is an established market in Canada that is still growing.
- Perception of Canada's safety and dollar value guides their decisions to stay longer.
- The beauty and diversity of Albertan landscapes are attracting visitors, as well as, adventure, culture, history and culinary tourism.[40]
- The US is Alberta's largest international market according to Travel Alberta's analysis of the 2015 Stats Canada data.

UNITED KINGDOM

- The United Kingdom is Alberta's largest overseas market. In 2015, there were 151,600 overnight visits by U.K. travellers to Alberta, totalling $197.3 million in tourism expenditures.[41]
- Awareness of regions outside the Mountain Parks is low; however, Strathcona County has experiences that may resonate with this market.
- Residents of the U.K. are keen to travel and tend to stay longer and spend more that other markets.[42]

GERMANY

- German leisure travellers perceive Canada as a top travel destination offering authentic and relevant travel experiences.
- About half of German holiday trips to Canada are into B.C., Alberta and/or the Yukon.
- Three quarters of these trips are for pleasure or to visit friends and relatives.
- In 2015, there were 117,100 overnight visits by German travellers to Alberta, totalling $121.5 million in tourism expenditures.
- Cultural experiences tend to resonate strongly with German travellers. This is particularly true for First Nations experiences.

CHINA

- Visitation from China has steadily increased since Canada received Approved Destination Status in 2010.
- In 2015, there were 85,300 overnight visits to Alberta from Chinese travellers, totalling $75.8 million in tourism expenditures.
- While the traditional escorted tour group remains popular, Chinese travellers are increasingly interested in niche experiences, including ski, winter, RV, self-drive, photography and golf.[43]
- Independent, middle-class, affluent and youthful (20 to 45 years old) are characteristics that define the fastest growing segment of Chinese traveller.
- Recent political tensions with China may affect travel in the future.

JAPAN

- Travel from Japan to Canada is slowly recovering after more than a decade of general decline (50% from 2002 to 2010).
- In 2015, there were 60,100 overnight visits by Japanese travellers, totalling $67.3 in tourism expenditures.
- While time and affordability are cited as barriers to a Canadian holiday, Japanese travellers feel Canada offers good value for money and is among their top five destinations to consider.
- Older travellers aged 55+ represent the largest segment of potential travellers from Japan, followed by travellers aged 18 to 34.
- The trend is toward more independent travel, but packaged tours booked through travel agents remain standard.[44]

AUSTRALIA

- Australian travel to Canada shows steady, gradual growth. In 2015, there were 92,300 overnight visits by Australians to Alberta, totalling $133.5 million in tourism expenditures.[45]
- Canada is well perceived by Australians, and the majority of their trips to Canada are for pleasure or to visit friends and relatives (86%).
- Most visitors travel independently (nearly 60%), with only 18% choosing an escorted tour.

COMPETITOR ANALYSIS

Destinations with similar product offerings to Strathcona County compete with the County to attract visitors. These destinations were analyzed to identify best practices, as well as what makes Strathcona County unique in relation to them.

CITY OF EDMONTON

The City of Edmonton is home to approximately one million people and is the primary destination in the Capital Region. Known as the Festival City, Edmonton provides a wealth of year-round festivals and events for potential visitors of all kinds. The City's river valley and park system contains over 150 km of trails and offer a compelling outdoor experience offering to both residents and visitors. The City is also a burgeoning centre for arts, culture, sports, entertainment, shopping, and culinary delights. Areas such as Whyte Avenue, Jasper Avenue and the Arena District are well developed and contain many assets that attract visitors.

The City's destination management organization, Edmonton Tourism, offers a coordinated, strategic management and marketing approach to tourism in Edmonton and the surrounding area. Edmonton excels at sport tourism and attracts athletes, tournaments, and major competitions from a wide variety of sports. The City is the main competition for potential visitors to Strathcona County.

It should be noted that the City of Edmonton's excellent attractions and reputation for festivals, events, arts, and culture could be leveraged to grow tourism in Strathcona County. Strathcona County can explore partnership opportunities with Edmonton-based attractions and events to position itself as a "gateway" to Edmonton.

CITY OF ST. ALBERT

The City of St. Albert has a population of 64,645 and boasts many similarities to Strathcona County's Sherwood Park community. The City is home to many similar tourism assets as Strathcona County and has access to a comparable market. Known for its beautiful parks and green spaces, St. Albert has over 60,000 managed trees and a variety of natural vegetation areas. The Red Willow Trail System offers more than 99 kilometres of trails connecting parks and neighbourhoods alone. St. Albert's Arden Theatre hosts over 150 performances a year and is of a comparable size to Strathcona County's Festival Place. The City is also home to the International Children's Festival, one of the longest running Children's Festivals in North America, and has hosted large-scale sporting competitions, including the Alberta Summer Games in 1979, the Alberta Winter Games in 1994, the Alberta 55+ Winter Games in 2011, and the Special Olympics Canada Winter Games in 2012. St. Albert has an attractive downtown that is animated with programming during the summer months.

CITY OF LEDUC

The City of Leduc has a population of 33,032 and is located to the south of Edmonton, along the QE2 highway, and adjacent to the Edmonton International Airport and Nisku industrial area. Leduc's position next to Edmonton, the airport, and the region's major thoroughfare provides the City with access to many both business and leisure travellers. Leduc has an established Main Street shopping district and a strong supply of accommodations. The Leduc Recreation Centre offers residents and visitors a major indoor recreation facility comparable to Strathcona County's Millennium Place. Leduc is also home to over 60 km of paved multiway trails and Telford Lake, a popular wetland area and wildlife viewing location. William F. Lede Park regularly hosts a variety of outdoor sport competitions including slo-pitch, softball, rugby, soccer, and lacrosse. The City directs its efforts towards attracting sport tourism by leveraging the over 800 acres of recreation and athletic facilities in the City.

CANADIAN ROCKIES (JASPER, BANFF AND CANMORE)

The Towns of Jasper, Banff and Canmore are well known destinations with a compelling nature-based offering. These destinations have embraced their natural assets by developing and promoting them in categories, by season and with supporting infrastructure.[46] The resulting experiences facilitate powerful connections between their visitors and nature, while serving to further connect visitors to the destinations' sustainability efforts. Capital region residents regularly flock to these areas for a variety of outdoor activities, festivals, events, and sightseeing. The Edmonton area accounts for 28% of the annual 1.93 million domestic overnight visits to the Canadian Rockies tourism region, second only to the Calgary area at 31%.[47] The region offers visitors breath-taking views, world-renowned skiing and hiking, unique local wildlife, intriguing cultural-heritage sites and events, and year-round international and domestic appeal. The natural attractions of Strathcona County, such as the Beaver Hills Biosphere and neighbouring Elk Island National Park, compete with the strong natural offerings of the Canadian Rockies.

Best Practices

Best practices from these competitive destinations and other successful tourism communities are provided below:

- Clearly identified tourism brand, experiential offering and core market focus.
- Collaborative relationships exist between private and public tourism partners to develop product, access funding and market the destination.
- Sophisticated online presence with appropriate visitor information and planning support.
- The destination invests in community assets that improves quality of life for residents and is appealing to visitors, vacation property owners, and potential investors.
- The destination commits to supporting tourism-related entrepreneurs and small businesses.
- Municipality commits staff and resources to programs and services that make the community vibrant and engaging for residents and visitors (e.g. festivals, sporting events, etc.).

6 VISION FOR THE FUTURE

CASE FOR CHANGE

Strathcona County's primary economic base is the petrochemical and hydrocarbon sector. However, the current economic situation in the province has curtailed investment and income in the energy sector. This may lead to business owners, employees and residents in Strathcona County to look to other industries for opportunity.

Tourism is a growth sector for the province, and Strathcona County has identified tourism as a key opportunity to diversify and support the local economy. Additionally, local businesses and stakeholder groups have expressed their support for tourism development in Strathcona County. At a time when Alberta's economy is at a historic low, what is needed now is the will to take action to develop the local visitor economy.

READINESS FOR CHANGE

Key indicators support the assertion that Strathcona County is ready to pursue tourism development (see the Tourism Readiness Assessment in Appendix E).

THE OPPORTUNITY FOR SUSTAINABLE TOURISM DEVELOPMENT

Strathcona County is in a unique position when it comes to developing its tourism sector. Given the limited degree of development that has occurred to date, the community has a significant opportunity to align itself with the principles of sustainability. By codifying sustainability into the destination's "DNA" in the early stages of tourism development, the community will be better positioned to achieve sustainable, long-term benefits through tourism.

Sustainable tourism development can be encouraged by committing to a triple bottom line approach. The triple bottom line considers economic, environmental and social factors to develop a more holistic accounting of sustainability. For a sustainable system to work, everyone needs to see themselves in it and key players will need to be engaged to reach common goals. Why will everyone do this? The simple answer is because all will benefit. All have a vested interest in driving towards sustainability because there is inherent economic, social and environmental benefit in it.

Triple Bottom Line Approach

WHAT NEEDS TO CHANGE?

Collective buy-in and commitment to action is needed on the part of the private, public and non-profit sector organizations that have a stake in tourism. Developing tourism will require sustained, coordinated effort over many years and strategic investments in people and capital. The pay-off will be a strong tourism industry that provides sustainable benefits to the community for many years to come.

10 YEAR VISION

By 2030, Strathcona County will be known as a place where visitors can come to enjoy compelling nature-based offerings, authentic agritourism activities, immersive cultural experiences, and engaging events.

WHAT WILL BE HAPPENING BY 2025?

At the halfway point of executing the strategy, the following will be happening:

- There is a clear framework, organizational structure and funding model in place to support sustainable tourism development in Strathcona County.
- Visitors are excited about new and emerging visitor experiences available in Strathcona County.
- Tourism is recognized by the community and key stakeholders as an important mechanism in diversifying the local economy.
- Strathcona County has a compelling and unique tourism brand that sets it apart as a destination.
- Regional partners are being engaged in collaborative initiatives to achieve mutual tourism objectives.

WHAT WILL BE HAPPENING BY 2030?

- There is a significant increase in tourism product available to visitors, including nature-based experiences, agritourism activities, cultural experiences and festivals and events.
- Strathcona County is known as a place to come for high quality, sustainable visitor experiences.
- Strathcona County's tourism development system is sustainable, and the industry is poised for future growth.
- There are clear economic and social benefits that have quantified the return on investment in tourism.

7 MARKET STRATEGY AND TARGET MARKETS

STRATEGY FOR TOURISM DEVELOPMENT

Ansoff's Product/Mission Mix was utilized to develop Strathcona County's strategy for tourism development (see Figure 4). This model helps to frame what direction tourism development should take. Ansoff's Matrix identifies four different strategies, which can be described as follows:

Market Penetration (existing products in existing markets)

- Expanded provision of existing product for existing markets.

Market Development (existing products in new markets)

- Focus on existing products promoted to market segments currently not highly engaged.

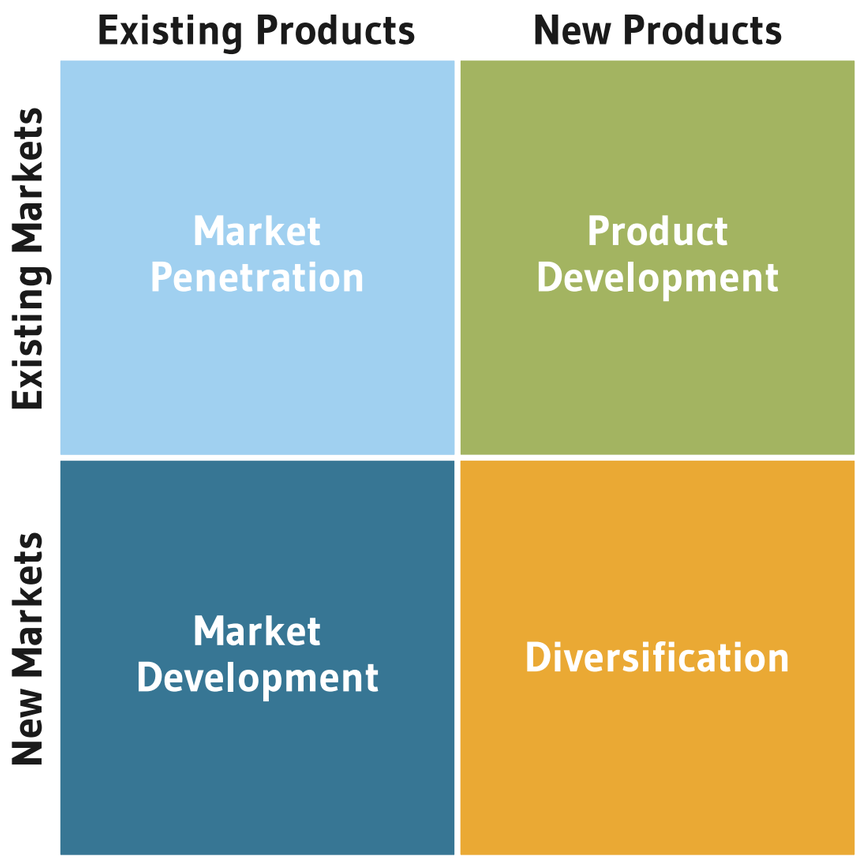
Product Development (developing new products for existing markets)

- Expansion of current products or addition of new products for existing markets.

Diversification (developing new products for new markets)

- Develop new products specifically designed to attract and engage new markets.

Figure 4. Ansoff's Product/Mission Mix



STRATEGIC FOCUS

Strathcona County will employ a product development strategy as its strategic focus. The following points support this focus.

PRODUCT DEVELOPMENT (PRIMARY FOCUS)

A. **Strong Need for New Product** – There is a strong need to further develop tourism product offerings in Strathcona County. There is currently a lack of visitor and market ready products. New, attractive products will need to be developed and packaged together to provide compelling reasons to visit Strathcona County.

B. **Strong Existing Markets** – The Edmonton area, eastern and northeastern Alberta, western and northwestern Saskatchewan, and niche international markets represent a significant number of potential visitors, and visitors from these areas are actively seeking the experiences that can Strathcona County can offer. There is a significant opportunity to create a stronger connection with this customer base in order to expand market share regionally.

C. **Strong Product Base to Build From** – Strathcona County has many assets that can be readily developed to make the region a compelling destination for visitors looking for nature-based, agritourism, sport tourism, festival and event, culinary, cultural and VFR experiences. These assets provide a strong base from which to build visitor and market ready tourism products.

Important Note

Product development is the primary strategic focus and the majority of implementation activities should generally fall within this focus. However, it is important to note that Strathcona County does not need to limit itself exclusively to this approach. If attractive opportunities within the focus areas of market penetration, market development or diversification present themselves, they should be considered on a case by case basis.

TARGET MARKETS FOR STRATHCONA COUNTY

Considering the visitor data described previously, and taking into account what inspires travel to Strathcona County, the following target markets have been identified for the strategy.

Target Markets:

1. *Overnight visitors from eastern and northeastern Alberta, and western and northwestern Saskatchewan travelling to Strathcona County to access regional services, explore area attractions and enjoy the small city atmosphere while being close to big city amenities.*
2. *Day-trippers from Edmonton and area seeking to immerse themselves in Strathcona County's natural landscapes, agritourism experiences, hip urban vibe, and authentic culture.*
3. *Event goers from Alberta and other Canadian provinces who are drawn to Strathcona County for high quality sporting competitions, cultural festivals and other events.*
4. *Visiting friends and relatives travelling to Strathcona County and the neighbouring communities who are looking to connect with their hosts through the County's authentic experiences.*
5. *International visitors seeking to immerse themselves in niche Alberta-based experiences, such as dark sky/northern lights viewing, eco-tourism, agritourism and Indigenous tourism.*

STRATHCONA COUNTY'S COMPETITIVE ADVANTAGE

Strathcona County is a safe, welcoming and clean community that offers access to big city amenities while maintaining a distinctive rural atmosphere. It is the home base of adventure in the Edmonton region for those who want to stay in a smaller centre while enjoying excellent nature-based activities, a hip urban vibe, outstanding shopping, high quality sporting events and a wide variety of cultural experiences.

Strathcona County is the home base of adventure in the Edmonton region for those who want to stay in a smaller centre while enjoying excellent nature-based activities, a hip urban vibe, outstanding shopping, high quality sporting events and a wide variety of cultural experiences.

8 FOCUS AREAS AND GOALS

FOCUS AREAS AND GOALS

Four overarching focus areas with accompanying goals have been developed to guide the tourism strategy. Detailed action items stemming from the goals are provided in Section 10 – Action Plan and Performance Measures.

FOCUS AREA 1: ORGANIZATIONAL DEVELOPMENT

Goal: *Build organizational capacity to ensure sustainable tourism development in Strathcona County.*

The first step toward sustainable tourism development in Strathcona County will be to organize and enhance the community's tourism service delivery system. Multiple partner organizations from a variety of sectors will need to come together through collaborative efforts to organize for tourism growth.

FOCUS AREA 2: DESTINATION DEVELOPMENT

Goal: *Enhance the capacity of the community to develop into a compelling destination.*

The community shall undertake key capacity enhancing actions that will support stakeholders in their efforts to transform Strathcona County into a compelling destination.

FOCUS AREA 3: PRODUCT DEVELOPMENT

Goal: *Develop highly engaging tourism experiences to attract visitors to Strathcona County.*

In order to attract more visitors to Strathcona County, highly engaging and immersive tourism experiences will need to be developed. Six product development streams have been identified through the strategic planning process which show the greatest potential for development in the near-term. These streams include:

1. **Nature-Based and Outdoor Experiences**
2. **Agritourism and Culinary Experiences**
3. **Sport Tourism**
4. **Festivals and Events**
5. **Cultural Tourism**
6. **Visiting Friends and Relatives Tourism**

FOCUS AREA 4: MARKETING & PROMOTIONAL DEVELOPMENT

Goal: *Expand the destination's understanding of its visitors and entice travellers to visit by promoting the region's experiences to key target markets.*

To grow as a destination, Strathcona County will need to establish a clear and compelling tourism brand, as well as organize and expand its tourism marketing activities. More visitor data is needed to clearly understand consumer needs.

9 IMPLEMENTATION FRAMEWORK

TOURISM STRATEGY IMPLEMENTATION FRAMEWORK

This section describes an implementation framework for the tourism strategy. The framework identifies an organizational structure (see Figure 5) and outlines the roles each organization will play in implementation. A discussion on funding mechanisms to support the strategy is provided in Appendix F.

Figure 5. Tourism Strategy Implementation Framework

HOST ORGANIZATION

It is recommended that in the short to medium term, Strathcona County takes on the role of "Host Organization" for the strategy. It is possible that as the strategy evolves, another organization may step forward to take on this role. Table 1 describes a set of criteria that will assist in selecting a Host Organization should this occur.

Table 1. Criteria for Selecting a Host Organization

CRITERIA	DESCRIPTION
Goal Alignment	The extent to which the goals of the organization align with those of the strategy.
Organizational Capacity	The extent to which the organization has the capacity to add value. Do they have the business infrastructure, experience, management capacity and financial resources to be an active leader in the strategy?
Knowledge	The extent to which the organization understands tourism development, specifically as it relates to this strategy.
Entrepreneurial Mindset	The extent to which the organization has the ability to be innovative and entrepreneurial in order to generate revenue to be reinvested in the strategy.
Complementary Skills	The extent to which the organization will bring to the arrangement a complementary skill set and/or other resources that will add value to the strategy.
Past Success	The extent to which the organization has been successful elsewhere in similar projects.

The role of the host organization is that of facilitator, trainer, organizer and champion.

Implementation Approach

In order to effectively implement the strategy, it will be important to diversify the workload to those that have the most to gain by building the tourism industry. New tourism development activities need to be executed on the local level wherever possible. This will not occur without adequate support and development by the Host Organization.

The role of the Host Organization is as follows:

Role:

- Facilitator, trainer, organizer and champion.
- Oversees the "big picture" to ensure the strategy's action items are moving forward in the most effective and cohesive manner in the next 10 year period.
- Secures partnerships and leverages funds.

TOURISM STRATEGY TASK FORCE

The role of the Tourism Strategy Task Force is as follows:

Role:

- The main forum for Action Teams to report on progress.
- A forum for collaboration on the promotion and development of tourism initiatives.

Composition:

- Strathcona County Economic Development and Tourism
- Strathcona County Recreation, Parks and Culture
- Sherwood Park & District Chamber of Commerce
- Accommodation Sector
- Retail Sector
- Attractions/Tour Operator Sector
- Food and Beverage Sector
- Nature-Based Outdoor Experiences Sector
- Agritourism and Culinary Experiences Sector
- Sports Tourism Sector
- Festivals and Events Sector
- Cultural Experiences Sector (Including Indigenous Tourism)
- 2 members at large

The Tourism Strategy Task Force would remain in operation for the duration of the strategy.

ACTION TEAMS

Action Teams implement key projects in each of the areas of focus. Action Team representatives will report on their initiatives periodically at Tourism Strategy Task Force meetings.

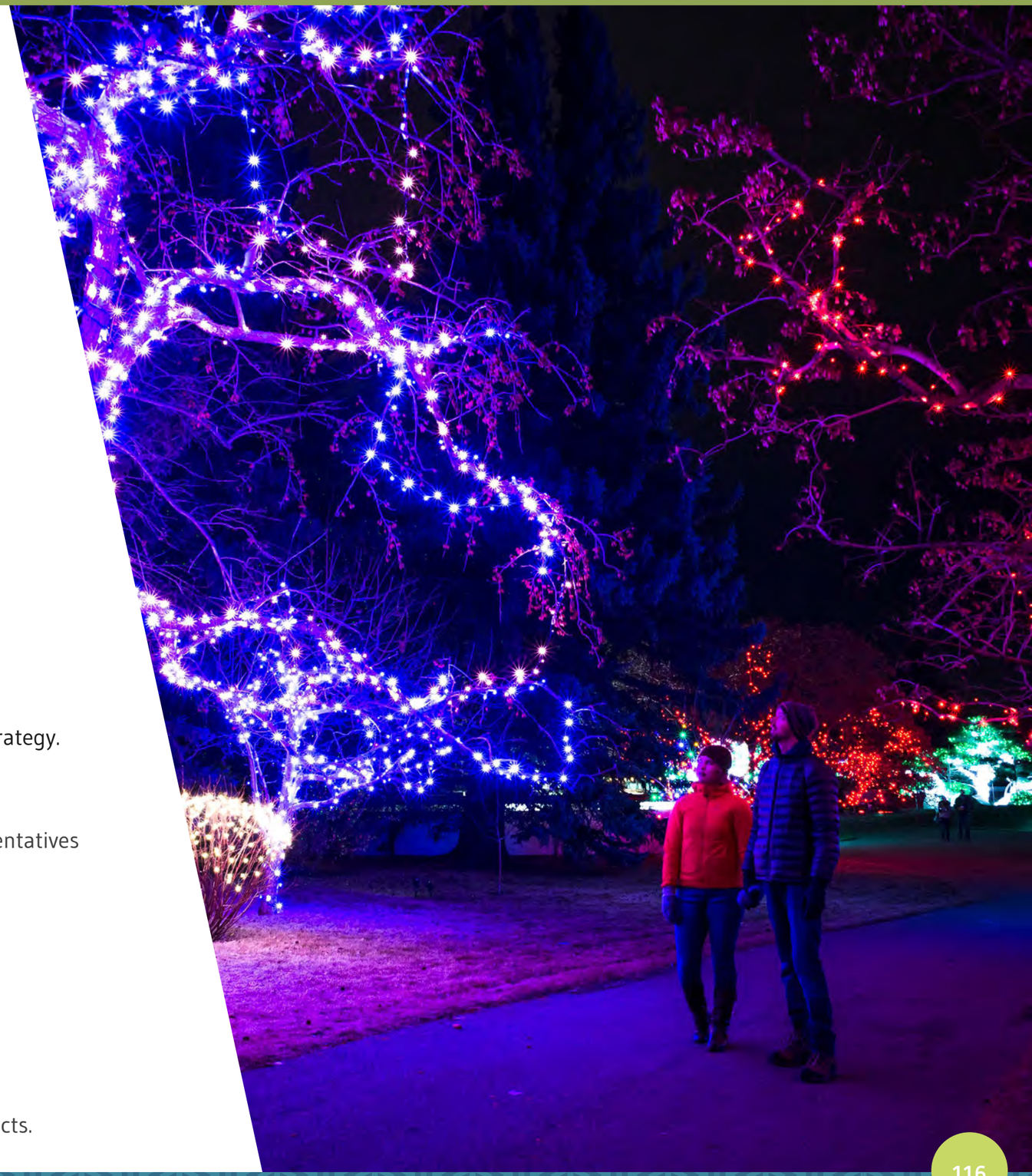
Role:

- Implement key projects in each of the areas of focus.

Composition:

- Members of the Tourism Strategy Task Force as required
- Members of other community organizations/businesses as required

Action Teams would operate as long as is required to implement their assigned projects.



PARTNER ROLES AND RESPONSIBILITIES

The implementation of this strategy will require the cultivation of partnerships to collaboratively accomplish initiatives. The following identifies key partners for the strategy and describes their role.

ORGANIZATION	ROLE
Strathcona County (Host Organization)	• Takes the lead role in ensuring the strategy is moving forward in the most effective and cohesive manner.
Tourism Strategy Task Force	• A multi-stakeholder group that acts as a forum for consistent communication, collaboration and idea sharing related to the development of the strategy.
Sherwood Park & District Chamber of Commerce	• The Chamber is a key link to the business community and will be an important leader in tourism development. • The Chamber should encourage members to participate in implementation of the strategy.
Businesses and Entrepreneurs	• The private sector provides many of the front-line services to visitors, such as accommodations, food and beverage, and experiences. • Local businesses will play a key role in growing tourism in Strathcona County through the development and delivery of high-quality experiences. Businesses must be actively engaged in implementing the strategy and need to be more involved in tourism development than they currently are.
Residents	• Passionate and dedicated community champions will need to be inspired to help implement the strategy and generate buy-in within the community. Making the opportunity to participate in task forces will be important.
Beaver Hills Initiative	• The Beaver Hills Initiative contributes to the environmental, social, economic and cultural wellbeing of the Beaver Hills region. • The Tourism Working Group works with government partners, operators, cultural agencies, visitors and residents to encourage the growth, development, promotion and enjoyment of sustainable nature based tourism opportunities within the Beaver Hills.
Parks Canada	• Parks Canada is an important partner in developing tourism product in the region, as well as encouraging stewardship of the land. Of particular interest is nature-based tourism at Elk Island National Park.

Alberta Environment and Parks	• Alberta Environment and Parks manages the province's land base and natural resources through the Land-use Framework. All land-based activities are considered through this Framework, including tourism. • The Alberta Parks division manages provincial parks in the region and is a potential partner in developing tourism product, as well as encouraging stewardship of the land.
Strathcona County Heritage Foundation	• The Strathcona County Heritage Foundation collects, preserves, promotes and displays the history and heritage of Strathcona County through the operation of the Strathcona County Museum and Archives. • This group could be further engaged in the development of culture and heritage experiences in the County to drive visitation.
Alberta Economic Development, Trade and Tourism	• Alberta Economic Development, Trade and Tourism could be an important funding partner moving forward. The department also provides excellent resources, training and advice in implementation.
Travel Alberta	• Travel Alberta provides funding for promotion of tourism initiatives through its cooperative marketing investment fund (currently on hold). It is important that the County works closely with Travel Alberta to benefit from its extensive knowledge and resources.
Indigenous Tourism Alberta	• Indigenous Tourism Alberta's mandate is to lead the development of Alberta Indigenous tourism industry. ITA could be a future partner in the development of Indigenous-related tourism offerings in Strathcona County.
Neighbouring Municipalities	• There is potential to partner with neighbouring municipalities on regional tourism initiatives (especially product development, packaging and collaborative marketing).
Go East of Edmonton	• Go East is a regional tourism organization that partners with private businesses, non-profits and government organizations to promote the region east of Edmonton to key visitor markets.
Other DMO's	• There are opportunities to partner with other DMO's on initiatives that support tourism development.
UNESCO	• UNESCO could be further engaged to enhance the promotion and programming of the Beaver Hills area for tourism purposes.

ORGANIZING FOR TOURISM DEVELOPMENT

Many destinations choose to identify an organization that focuses on tourism development on a community-wide basis These organizations are commonly known as Destination Management Organizations (or DMO's). The following discussion introduces what a DMO is and recommends a DMO development approach for Strathcona County.

THE ROLE OF A DESTINATION MANAGEMENT ORGANIZATION

DMO's play a key role in the long-term development of a destination. For visitors, DMO's are often the first point of contact they have with a destination. Therefore, DMO's formulate campaigns to attract target markets and serve as the primary source for tourist information (e.g. attractions, experiences, packages, accommodations, restaurants, etc.). They also take a lead role in advocating for and developing the tourism industry in their community. For further information regarding the functions of a DMO, see Figure 6 below.

Figure 6. Typical Functions of a DMO

DESTINATION DEVELOPMENT	MARKETING AND COMMUNICATIONS	FINANCE AND OPERATIONS
• Business engagement • Community engagement • Tourism strategy • Product development • Partnership development • Grant acquisition • Sponsorship • Education • New business creation and lead generation • Advocacy • VIC management	• Develop/execute marketing strategy including collaborative marketing campaigns • Social media engagement and content management • Website management • Media relations • Trade shows • Member events (e.g. AGM, member mixers)	• Financial management • Office management • HR management • Policy development • IT management • Data analytics and reporting • Contract and grant administration • Sales administration (e.g. operator buy-in opportunities for campaigns)

DMO DEVELOPMENT IN STRATHCONA COUNTY

In order to achieve the objectives and vision of this strategy, Strathcona County will need an organization that can deliver the services of a DMO. This organization will require skilled tourism staff to execute on destination development initiatives, marketing and communications activities, and administrative duties.

Short Term Approach: County Led – In the short term, it is recommended that Strathcona County expands its involvement in tourism development by further executing some of the functions of a typical DMO. In order to achieve this, the County will need to further invest in human resources. Additional positions the County may consider investing in include a Destination Development Specialist and a Tourism Marketing Coordinator. The County may also consider adding a Sports Tourism Coordinator.

Medium Term Approach: Fully Established DMO: – In the short to medium term, it is recommended that the community reviews the opportunity to establish an arms length DMO. This organization will need a high level of engagement from the business community and other stakeholders, as well as additional staff to deliver destination development services. It will need to be very entrepreneurial and responsive to market demand while at the same time ensuring the social and environmental pillars of sustainability are inherent in its operations. It is important that the County stays actively involved as a major partner, no matter which operating model is chosen.

To determine an optimal and sustainable model for a DMO in Strathcona County, a detailed study is needed. The study should consider multiple opportunities for governance, including (but not limited to) a new third-party organization, establishment of a DMO business unit in an existing organization, contracting services to an external organization, or establishment of a DMO business unit in an existing County department. Through this study, the following key organizational components will be determined:

- Vision
- Mission
- Purpose
- Governance structure
- Operations plan
- Staff complement
- Budget projections (revenue + expense)
- Funding model

A clear and actionable DMO startup plan will also be needed.

OPPORTUNITY FOR REGIONAL COLLABORATION IN DESTINATION DEVELOPMENT

Strathcona County stands to benefit by cooperating with Edmonton and other communities in the region to attract visitors. Although communities may compete at the local level for visitors, it is important to cooperate to draw visitors to the region in the first place. This cooperation can take many forms including joint marketing initiatives, event attraction, product development and packaging. Edmonton Tourism presents a particularly attractive offering, given their well-developed tourism promotion and management systems, as well as their existing relationships with tourism industry stakeholders (e.g. receptive tour operators, attractions, events, etc.). Through our engagement with this organization, they have expressed interest in providing some of the services of a typical DMO to the County on a fee for service basis (e.g. trade show representation). Strathcona County should consider partnering with Edmonton Tourism as this organization's capabilities have the potential to fast track destination development activities. Similarly, there may be opportunities to partner with other DMO's (e.g. GO East).

10 ACTION PLAN AND PERFORMANCE MEASURES

The action plan is divided into six sub-sections, which include:

Organizational Development 131
Destination Development 135
Product Development 141
Marketing and Promotional Development 147
Top 10 Action Items 151
Measuring Success 153

Each action item has been assigned a suggested priority rating, estimated cost, organizational lead and anticipated timeline for implementation.

PRIORITY CRITERIA

Low Priority (L)	There is considerable benefit to tourism, however; because of phasing considerations, cost, organizational readiness, or relative importance in relation to other initiatives, these initiatives are deemed a lower priority **at this time**.
Medium Priority (M)	There is a considerable benefit to tourism, however; because of phasing considerations, cost, organizational readiness, or relative importance in relation to other initiatives, these initiatives are deemed a lower priority than high priority items **at this time**.
High Priority (H)	There is a strong benefit to tourism, and because of phasing considerations, cost, organizational readiness, or relative importance in relation to other initiatives, these initiatives are deemed a high priority **at this time**.

COST CRITERIA

Low Cost (L)	Less than $10,000
Medium Cost (M)	$10,000 - $50,000
High Cost (H)	More than $50,000

ORGANIZATIONAL LEAD

The action plan identifies organizations responsible for leading action items. It is expected that lead organizations will provide the resources necessary to implement their action items. Where appropriate, they are encouraged to seek partnerships with stakeholder groups, neighbouring municipalities, provincial ministries, the private sector and other applicable groups wherever possible to leverage available resources. Residents can also be engaged through task forces and committees to help contribute to implementation. Please see next for a list of these organizations.

ABBREVIATION	ORGANIZATION
HO	Host Organization
SC	Strathcona County
TSTF	Tourism Strategy Task Force
AEDTT/TA/AP	Provincial Organizations (Alberta Economic Development, Trade and Tourism, Travel Alberta, Alberta Parks)

IMPLEMENTATION TIMELINE

Short Term (S)	Less than 2 years
Medium Term (M)	2 – 5 years
Long Term (L)	More than 5 years

QUICK WINS

★ A blue star indicates that an action item is a "Quick Win." Quick wins are actions that can be implemented within a year or two, have a high probability of success and have a relatively low cost.

HIGHEST PRIORITY ITEMS

! An exclamation mark identifies items that should be considered the highest priority in the short term.

FUTURE PLANNING, EVALUATION, AND REPORTING

A key component of the success of this strategy will be the evaluation of its initiatives. The action plan should be reviewed bi-annually, at which time priorities should be re-evaluated and a discussion of any variances should occur in reference to key performance indicators (KPI's). If new projects are added (or old projects removed) as the plan progresses, this should be done by weighing the relative priority of all projects in the plan. The action plan should be updated on a yearly basis; therefore, the third quarter evaluation period will set the stage for the updated version of the plan. In the fourth quarter, the updated plan should be formalized and a draft approved by the end of the year.

IMPLEMENTATION CONSIDERATIONS

In total, the action plan identifies 76 action items, grouped into 24 separate priority initiatives. Attempting to complete all initiatives concurrently will stretch the resources and limit the focus of the Host Organization as it implements the plan. Therefore, it is recommended that implementation of the plan begin with the highest priority items (!).

ORGANIZATIONAL DEVELOPMENT

LEGEND:

Priority/ Cost
- L (Low)
- M (Medium)
- H (High)

Lead
- HO (Host Organization)
- SC (Strathcona County)
- TSTF (Tourism Strategy Task Force)
- AEDTT/TA/AP (Provincial Organizations)

Timeline
- S (less than 2 years)
- M (2 - 5 years years)
- L (more than 5 years)

★ Quick Win

! Highest Priority Items

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
A. Organize and Collaborate for Tourism	!	1.A.1 – Obtain formal commitment from Strathcona County and other key stakeholders to implement the Tourism Strategy and Implementation Plan.	H/L	SC/S
	!	1.A.2 – Establish a Host Organization and Task Force who will be primarily responsible for implementing the Tourism Strategy and Implementation Plan. In the short term, it is recommended that Strathcona County take on the role of Host Organization.	H/L	SC/S
	!	1.A.3 – Conduct a study that will analyze the feasibility of a Destination Management Organization in Strathcona County.	H/M	HO (SC)/S
		1.A.4 – Establish a "go-to point of contact" for tourism marketing and visitor experience development in Strathcona County. It is recommended that Host Organization fills this role in the short-term.	H/L	HO (SC)/S
B. Allocate Resources to Tourism	!	1.B.1 – Allocate resources to implement the Tourism Strategy and Implementation Plan. Wherever feasible, resources should be leveraged between multiple partner organizations.	H/H	All/S
		1.B.2 – Increase the capacity of Strathcona County to support tourism development through the addition of a Destination Development Specialist.	H/H	HO (SC)/S
		1.B.3 – Hire additional product development, marketing and administrative staff to achieve the objectives of this strategy and execute the duties of a typical DMO. It is anticipated at least two additional staff members would be needed in the medium-term, with several more phased in over time. The staffing complement will be established through the DMO feasibility and startup study.	M/H	HO (DMO)/M
		1.B.4 – In conjunction with the DMO Feasibility Study, explore the feasibility of implementing a Destination Management/Marketing Fund (DMF) to support tourism development initiatives.	M/M	HO (DMO)/M

LEGEND:

Priority/ Cost	**L (Low)** **M (Medium)** **H (High)**
Lead	**HO (Host Organization)** **SC (Strathcona County)** **TSTF (Tourism Strategy Task Force)** **AEDTT/TA/AP (Provincial Organizations)**
Timeline	**S (less than 2 years)** **M (2 - 5 years years)** **L (more than 5 years)**
★	**Quick Win**
!	**Highest Priority Items**

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
C. Collaborate with Key Partners	! ★ 1.C.1 –	Deliver presentations to the Boards of key stakeholder organizations to encourage collaboration on the implementation of the Tourism Strategy and Implementation Plan.	H/L	HO (SC)/S
	! ★ 1.C.2 –	Host a tourism planning forum with stakeholders to kick off strategy implementation.	H/M	HO (SC)/S
	1.C.3 –	Schedule bi-annual meetings within Strathcona County Administration to discuss priorities and opportunities to support each other.	H/L	SC/ Ongoing
	1.C.4 –	Host an annual tourism planning forum for all tourism stakeholders in the community.	H/L	TSTF/ Ongoing
	1.C.5 –	Schedule bi-annual meetings with regional partners to share tourism-related plans and build new product (e.g. Edmonton Tourism, Elk Island National Park, Ukrainian Cultural Heritage Village, etc.).	H/L	HO (SC)/ Ongoing
	! 1.C.6 –	Meet with Edmonton Tourism and other DMO's to identify opportunities for the potential of fee for service provision.	H/L	HO (SC)/S
	1.C.7 –	Meet with TA and AEDTT to determine opportunities to work together.	H/L	HO (SC)/S

DESTINATION DEVELOPMENT

LEGEND:

Priority/ Cost	**L (Low)** **M (Medium)** **H (High)**
Lead	**HO (Host Organization)** **SC (Strathcona County)** **TSTF (Tourism Strategy Task Force)** **AEDTT/TA/AP (Provincial Organizations)**
Timeline	**S (less than 2 years)** **M (2 - 5 years years)** **L (more than 5 years)**
★	**Quick Win**
!	**Highest Priority Items**

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
A. COVID-19 Crisis Management !	2.A.1 –	Develop a Tourism Threat Identification, Mitigation and Response Plan in response to COVID-19. Consider expanding the scope of the plan to include other threats	H/M	HO (SC)/S
B. Increase the Capacity of Local Operators !★	2.B.1 –	Assess the needs of local tourism operators and tourism-related businesses and provide educational opportunities to increase their capacity. There are many excellent training opportunities that could be offered, including: • Experience Essentials Workshop (TA) • Partnering and Packaging Workshop (TA) • SHiFT Program: Transforming Products to Experiences (TA) • Tourism Entrepreneurship Startup Seminar (AEDTT) • Visitor Information Providers Program (AEDTT) • Spring Training (AEDTT) • SuperHost Customer Service Training (go2HR) • Familiarization tours. Funding support for these programs may be available from provincial sources (e.g. Travel Alberta or Alberta Economic Development, Trade and Tourism).	H/M	HO (SC) + TSTF in cooperation with TA + AEDTT/S
C. Support Development of the Tourism Sector	2.C.1 –	Develop and launch a Tourism Business Retention and Expansion Program. Funding support may be available through the Tourism Industry Business Retention and Expansion Project: https://www.alberta.ca/tourism-industry-business-retention-expansion-project.aspx.	M/M - H	SC/M
	2.C.2 –	Explore the feasibility of developing a multi-faceted Tourism Development Incentive Program that will encourage the creation of new tourism businesses and the expansion of existing tourism businesses.	M/M - H	SC/M
	2.C.3 –	Review municipal bylaws, policies and procedures to ensure a strong foundation and favourable regulatory framework is in place to support tourism development.	M/L	SC/M
	2.C.4 –	Identify barriers for local tourism operators and work to reduce and/or remove them wherever feasible.	M/L	HO (SC) + TSTF/ Ongoing

LEGEND:

Priority/ Cost	**L (Low)** **M (Medium)** **H (High)**
Lead	**HO (Host Organization)** **SC (Strathcona County)** **TSTF (Tourism Strategy Task Force)** **AEDTT/TA/AP (Provincial Organizations)**
Timeline	**S (less than 2 years)** **M (2 - 5 years years)** **L (more than 5 years)**
★	**Quick Win**
!	**Highest Priority Items**

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
D. Develop Tourism Sustainably	2.D.1 –	Evaluate options to develop and implement a destination-wide sustainable tourism program for Strathcona County that includes the triple bottom line approach (Social, Environmental, Economic).	M/M	HO (DMO)/ S - M
	2.D.2 –	Encourage the sustainable development of tourism in Strathcona County. This could be accomplished through: • Establishing a visitor management system. • Encouraging businesses to implement sustainability standards and practices. • Developing policies and programs to protect critical natural and social assets of the community. • Implementing a broad sustainable destination monitoring program.	M/M – H	HO (DMO) + TSTF/ Ongoing
E. Improve the Visitor Friendliness of the Community	2.E.1 –	Complete a Visitor Friendly Assessment (VFA) of Strathcona County. The VFA will provide a practical assessment of how the community presents itself to visitors and include an actionable plan that will lead to tangible improvements in visitor friendliness. Funding support may be available through the Visitor Friendly Program: https://www.alberta.ca/visitor-friendly-program.aspx	H/H	TSTF/S - M
F. Ensure Tourism is Considered in all Future Long-Term Planning ★	2.F.1 –	Plan proactively for tourism infrastructure and prominently consider long term tourism development in all planning. As part of this proactive planning, the needs of the County's tourism sector should be brought to the attention of planners during the development of long term strategies across all functional areas, including infrastructure, planning and development, recreation, parks and culture, economic development, social planning, etc.	H/L	HO (SC) + SC/Ongoing
	2.F.2 –	Continue to work on the following tourism-related implementation items from Strathcona County's Municipal Development Plan: • Update the Land Use Bylaw to define and include small scale tourism as a use within compatible districts. • Update the Land Use Bylaw to define medium and large scale tourism and review the need for a land use district specific to medium and large scale tourism. • Update the Land Use Bylaw to define medium and large scale seasonal recreational resorts and create zoning districts specific to medium and large scale seasonal recreational resorts.	H/L	SC/S

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
G. Measure Performance	2.G.1 –	Utilize the attached performance metrics and other measures as appropriate to measure performance on an annual basis. Use the data collected during the first year of measurement as a benchmark to compare future results to.	H/L	HO (SC) + TSTF/ Ongoing
	2.G.2 –	Conduct an economic impact assessment to benchmark the financial impact of the local tourism industry for future comparison.	M/H	HO (SC)/S
	2.G.3 –	Commit to formal communication and reporting processes to keep stakeholders and the community apprised of tourism developments.	H/L	HO (SC)/ Ongoing

LEGEND:

Priority/ Cost
- L (Low)
- M (Medium)
- H (High)

Lead
- HO (Host Organization)
- SC (Strathcona County)
- TSTF (Tourism Strategy Task Force)
- AEDTT/TA/AP (Provincial Organizations)

Timeline
- S (less than 2 years)
- M (2 - 5 years years)
- L (more than 5 years)

★ Quick Win

! Highest Priority Items

PRODUCT DEVELOPMENT

LEGEND:

Priority/ Cost
- L (Low)
- M (Medium)
- H (High)

Lead
- HO (Host Organization)
- SC (Strathcona County)
- TSTF (Tourism Strategy Task Force)
- AEDTT/TA/AP (Provincial Organizations)

Timeline
- S (less than 2 years)
- M (2 - 5 years years)
- L (more than 5 years)

★ Quick Win

! Highest Priority Items

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
A. Expand and Enhance Tourism Offerings in Strathcona County ! ! ★	3.A.1 –	Develop a Tourism Product Development Plan that will increase the number of market ready experiences that appeal to key visitor markets. The plan should focus on the six product development streams identified in this strategy.	H/H	HO (SC) + TSTF/S
	3.A.2 –	Develop compelling tourism packages and itineraries for key visitor markets.	H/L	TSTF/S
B. Nature-Based and Outdoor Experiences	3.B.1 –	Complete the trail system along Strathcona County's portion of the North Saskatchewan River according to the River Valley Alliance's project plans.	To be determined through the Tourism Product Development Plan.	
	3.B.2 –	Further develop outdoor experiences in the County (e.g. guided outdoor tours, equipment rentals for outdoor adventures, dark sky/northern lights viewing, etc.).		
	3.B.3 –	Encourage further development of ecotourism experiences in the County (e.g. low impact outdoor activities such as hiking, bird watching, or paddling, educational tours on flora and fauna, etc.). Specifically work with Elk Island National Park, the Beaver Hills Biosphere and the Strathcona Wilderness Centre to develop these experiences.		
	3.B.4 –	Develop investment prospectuses to encourage the development of niche, nature-based accommodation offerings and attractions in the County (e.g. nature lodges, glamping, wilderness retreats).		
	3.B.5 –	Engage with partners, such as the Beaver Hills Tourism Working Group, to develop sustainable outdoor experiences.		
	3.B.6 –	Seek opportunities to expand RV and rustic camping experiences in the County.		
C. Agritourism and Culinary Experiences	3.C.1 –	Leverage the development of the Multipurpose Agricultural Facility to expand agritourism offerings.		
	3.C.2 –	Leverage Alberta Open Farm Days to expand agritourism offerings.		
	3.C.3 –	Encourage local agricultural operators to explore tourism opportunities (e.g. farm stays, u-picks, farm tours, long-table meals, etc.).		
	3.C.4 –	Develop unique culinary offerings in the County (e.g. farm-to-table, breweries, distilleries, restaurants, etc.).		
	3.C.5 –	Incorporate culinary experiences into visitor and market ready experiences in all other product categories.		

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
D. Sport Tourism	3.D.1 –	Develop a Sport Tourism Hosting Plan in collaboration with the County's Recreation, Parks and Culture Department with the goal of attracting multi-day sporting events to Strathcona County. As part of the plan, assess the potential to establish a multi-stakeholder bid committee who would take the lead on attracting sport tourism events.		
	3.D.2 –	Develop pre/post sport event experiences to entice participants and supporters to stay longer, do more and spend more.		
	3.D.3 –	Support investment in infrastructure to ensure community sporting venues will continue to be able to attract sport tourism events.		
	3.D.4 –	Consider adding a Sport Tourism Coordinator position in the Recreation, Parks and Culture Department.		
	3.D.5 –	Complete Economic Impact Analyses of all major sport tourism events hosted in Strathcona County.		
E. Festivals and Events	3.E.1 –	Develop a Tourism Festival and Event Plan for Strathcona County.		
	3.E.2 –	Enhance the municipality's web portal for festival and event planning with information and supports specifically for tourism-focused festivals and events.		
	3.E.3 –	Animate key areas of the destination, such as the Sherwood Park Town Centre and Broadmoor Park, throughout the year with art installations, street performances, seasonal programming to draw visitors in and support festivals and events.		
	3.E.4 –	Explore the opportunity to attract the meetings, incentives, conventions and events (MICE) market.		

LEGEND:

Priority/ Cost	**L (Low)** **M (Medium)** **H (High)**
Lead	**HO (Host Organization)** **SC (Strathcona County)** **TSTF (Tourism Strategy Task Force)** **AEDTT/TA/AP (Provincial Organizations)**
Timeline	**S (less than 2 years)** **M (2 - 5 years years)** **L (more than 5 years)**
★	**Quick Win**
!	**Highest Priority Items**

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
F. Cultural Tourism	3.F.1 –	Build tourism focused programming around existing cultural assets, such as Festival Place, Strathcona County Museum and Archives, Mennonite Heritage Farm, and others.		
	3.F.2 –	Work with cultural groups to develop unique cultural tourism programs (e.g. interpretive tours of historic sites, Indigenous programming, art showcases, cultural demonstrations, etc.).		
	3.F.3 –	Position the Sherwood Park Town Centre and Centre in the Park area as the cultural "heart" of the destination and build tourism offerings around this.		
	3.F.4 –	Seek opportunities for product clustering with neighbouring communities (e.g. Fort Saskatchewan) and attractions (e.g. Ukrainian Cultural Heritage Village) through complementary programming.		
	3.F.5 –	Work with Indigenous Tourism Alberta to build Indigenous tourism experiences.		
G. Visiting Friends and Relatives Tourism Product	3.G.1 –	Develop a Tourism Ambassador Program.		
	3.G.2 –	Provide resources, training and other supports to encourage residents to host VFR (e.g. trip planning tools, ambassador programs, VFR packages, how-to-host tip sheets, etc.).		
	3.G.3 –	Encourage experience providers to offer host incentives, such as discounts when residents bring visitors with them.		

LEGEND:

Priority/ Cost
- L (Low)
- M (Medium)
- H (High)

Lead
- HO (Host Organization)
- SC (Strathcona County)
- TSTF (Tourism Strategy Task Force)
- AEDTT/TA/AP (Provincial Organizations)

Timeline
- S (less than 2 years)
- M (2 - 5 years years)
- L (more than 5 years)

Quick Win

Highest Priority Items

MARKETING AND PROMOTIONAL DEVELOPMENT

LEGEND:

Priority/ Cost	**L (Low)** **M (Medium)** **H (High)**
Lead	**HO (Host Organization)** **SC (Strathcona County)** **TSTF (Tourism Strategy Task Force)** **AEDTT/TA/AP (Provincial Organizations)**
Timeline	**S (less than 2 years)** **M (2 - 5 years years)** **L (more than 5 years)**
★	**Quick Win**
!	**Highest Priority Items**

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
A. Tourism Branding	! 4.A.1 –	Establish a clear and compelling tourism brand for Strathcona County. The brand should take into consideration the direction in the tourism strategy, as well as the community's future vision, and be grounded in what makes the destination special. Supporting materials and marketing collateral should be developed to support the brand (e.g. logo, tagline, media, brand toolkit, advertisements, visitor information, etc.).	H/H	HO (SC)+ TSTF/S
B. Improve Tourism Marketing	4.B.1 –	Develop a Tourism Marketing Plan for Strathcona County to further identify and focus marketing efforts on high value target markets. It is recommended that the Tourism Marketing Plan align with Alberta's new Visitor Services Model (2017).	H/H	HO (SC) + TSTF/S
	4.B.2 –	After more market ready tourism products are available in the County, consider offering familiarization tours to media outlets, travel influencers and the travel trade to attract increased visitation.	M/M	HO (DMO) + TSTF/M
	4.B.3 –	Send delegations of local tourism champions and representatives to important tourism conferences and trade shows to capitalize on emerging opportunities, build capacity and drive visitation to the destination (e.g. Travel Alberta Industry Conference, Sport Events Congress, Go West, etc.).	M/M	HO (DMO) + TSTF/ Ongoing
	4.B.4 –	Leverage Travel Alberta's Cooperative Marketing Investment Program* to achieve a higher leverage on tourism marketing resources. *This program is currently under review.	M/H	HO (DMO)/ M - L

LEGEND:

Priority/ Cost
- L (Low)
- M (Medium)
- H (High)

Lead
- HO (Host Organization)
- SC (Strathcona County)
- TSTF (Tourism Strategy Task Force)
- AEDTT/TA/AP (Provincial Organizations)

Timeline
- S (less than 2 years)
- M (2 - 5 years years)
- L (more than 5 years)

★ Quick Win

! Highest Priority Items

PRIORITY INITIATIVES		ACTION ITEMS	PRIORITY/ COST	LEAD/ TIMELINE
C. Enhance Visitor Information !	4.C.1 –	Conduct a Visitor Information Centre Operational and Location Analysis. The analysis will identify who is best positioned to operate the County's VIC, what services the VIC should provide, what supports it will need to operate effectively, and where it should be located. Alternatives to a bricks and mortar VIC should also be considered.	H/H	HO (SC) + TSTF/S
	4.C.2 –	Develop enhanced visitor information resources, including a dedicated tourism website. The resources should contain compelling visitor information for the entire County with experiential writing and compelling images. It is recommended that information be primarily geared for visitors, but it should also speak to residents in order to encourage VFR travel.	H/M - H	HO (SC) + TSTF/S
	4.C.3 –	Develop a tourism-focused signage and wayfinding strategy.	M/H	SC/M
	4.C.4 –	Re-inventory Strathcona County's tourism assets on an annual basis to ensure up-to-date information is available.	M/L	HO (DMO) + TSTF/ Ongoing
	4.C.5 –	List Strathcona County's market ready tourism products on ATIS 2.0.	M/L	TSTF/ Ongoing
	4.C.6 –	Explore the opportunity to operate mobile visitor information kiosks at large events hosted in the County.	L/L - M	HO (DMO)/M
D. Understand the Visitor ★	4.D.1 –	Conduct target market research to better understand existing and potential future visitor markets (e.g. visitor surveys, PRIZM analysis, data collection, etc.). Note that PRIZM analyses may be sponsored through AEDTT.	H/L	HO (DMO) TSTF/ Ongoing
	4.D.2 –	Develop and maintain target market profiles for Strathcona County's best customers.	H/L	HO (DMO) TSTF/ Ongoing
E. Collaborate Regionally ★	4.E.1 –	Begin discussions with other DMO's in the region to improve cross promotions and participate in regional marketing campaigns. Specifically review opportunities to collaborate with Edmonton Tourism and Go East of Edmonton.	H/L	HO (SC)/S
F. Business Engagement ★	4.F.1 –	Develop an "industry" portal on the Host Organization's website where businesses can learn about tourism supports, engage with each other and share information/resources/ ideas.	M/L	HO (SC)/S
G. Educate the Community on the Benefits of Tourism	4.G.1 –	Communicate and promote the benefits of tourism to the community through a coordinated and well-resourced public relations campaign.	M/M	HO (DMO) + TSTF/M
	4.G.2 –	On an annual basis, formally share "good news" stories related to tourism with the community (e.g. new business openings, business success stories, economic impact assessment results, etc.).	M/L	HO (DMO) + TSTF/ Ongoing

TOP 10 ACTION ITEMS

The following action items have been identified as the top short-term priorities to advance the destination toward its vision. The top 10 list has been organized in order of priority.

1. Obtain formal commitment from Strathcona County and other key stakeholders to implement the Tourism Strategy and Implementation Plan.
2. Allocate resources to implement the Tourism Strategy and Implementation Plan. Wherever feasible, resources should be leveraged between multiple partner organizations to build collaboration between stakeholders.
3. Establish a Host Organization and Tourism Strategy Task Force who will collaborate on implementing the Tourism Strategy and Implementation Plan.
4. Deliver presentations to the Boards of key stakeholder organizations to encourage collaboration on the implementation of the Tourism Strategy and Implementation Plan.
5. Host a tourism planning forum with stakeholders to kick off strategy implementation.
6. Develop a Tourism Threat Identification, Mitigation and Response Plan in response to COVID-19.
7. Assess the needs of local tourism operators and tourism-related businesses and provide educational opportunities to increase their capacity.
8. Conduct a feasibility study for the establishment of a Destination Management Organization in Strathcona County.
9. Develop a Tourism Product Development Plan that will increase the number of market ready experiences that appeal to key visitor markets.
10. Establish a clear and compelling tourism brand for Strathcona County.

MEASURING SUCCESS

18 key performance indicators (KPI's) have been developed for the strategy. It is suggested that the KPI's are measured and evaluated on an annual basis.

FOCUS AREA FOR GROWTH	KPI	MEASUREMENT TOOL
1. Increased Experiences	1.1 20% annual growth in experiential programming on a destination-wide basis (years 1-5).	Quarterly/annual reports
	1.2 75% of all businesses that are directly related to tourism trained in identified workshops (by year 5).	Quarterly/annual reports
2. Increased Awareness	2.1 20% annual growth in digital engagement with visitors (year 2 on).	Website Metrics
	2.2 20% annual growth in new product awareness by visitors (year 2 on).	Visitor Survey
	2.3 20% annual growth in new product awareness by residents (year 2 on).	Resident Survey
3. Increased Revenue	3.1 10% annual growth in new tourism businesses and associated increase in municipal business tax revenue (year 2 on).	Operational budgets
	3.2 10% annual growth in operational revenue at visitor attractions (year 2 on).	Operator Survey
	3.3 10% annual growth in leisure traveller accommodation receipts (year 2 on).	Operator Survey
	3.4 10% annual growth in tour operator receipts (year 2 on).	Operator Survey
	3.5 10% annual growth in retail and restaurant receipts during peak tourism periods (year 2 on).	Operator Survey
4. Increased Visitation	4.1 10% annual growth in number of visitors to attractions each year (year 2 on).	Visitor statistics from attractions
	4.2 10% annual growth in number of leisure traveller overnight stays each year (year 2 on).	Operator Survey
	4.3 10% annual growth in tour operator visitation (year 2 on).	Operator Survey
	4.4 10% annual growth in tourism event visitation (year 2 on).	Operator Survey
5. Increased Satisfaction	5.1 85% great rating at attractions (by year 5).	Visitor survey
	5.2 85% great rating with the quality of visitor amenities (by year 5).	Visitor survey
	5.3 85% great rating of overall experience in Strathcona County (by year 5).	Visitor survey
	5.4 20% increase in number of return visitors (by year 5).	Visitor survey

11 CONCLUSION

CONCLUSION

This document lays out a strategic direction that will advance Strathcona County toward its vision to become known as an exciting tourism destination. The County is in the early stages of development, but key indicators signal that the community is ready to capitalize on tourism growth.

The strategy will require a high degree of collaboration and significant investment between multiple stakeholders to be successful. It is only through cooperation that the community will achieve its vision and build a competitive destination in the long-term. By coming together as a team and committing to tourism development, the future will include a high quality of life for residents, strong income for businesses and a diversified economy.

APPENDICES

APPENDIX A: OVERVIEW OF RESEARCH

SURVEYS ADMINISTERED

- Strathcona County Resident Survey (281 responses)
- Strathcona County Stakeholder Survey (15 responses)

MEETINGS CONDUCTED

- Steering Committee Meetings (2)
- Sub-Committee Meetings (6)
- Stakeholder Input Tourism Cafés (2)
- Staff Engagement Sessions (2)
- Public Engagement Station
- Council Presentations (1)
- Public and Stakeholder Feedback Opportunity (TBD)

DOCUMENTS REVIEWED

- Strategies, plans and other documents from Strathcona County
- Strategies, plans and other documents from comparative destinations
- Tourism research and visitation statistics from Alberta Economic Development, Trade and Tourism, Travel Alberta and national sources
- Planning documents from stakeholders

See Appendix G for a detailed list of resources.

STAKEHOLDERS CONSULTED (THROUGH INTERVIEWS, SURVEYS OR IN-PERSON MEETINGS)

Municipal Government:

1. Strathcona County Council
2. Strathcona County Administration (including representation from Economic Development and Tourism; Recreation, Parks and Culture; Communications; Transportation and Agriculture Services; Planning and Development Services; Assessment and Tax; Family and Community Services; Corporate Planning; Transit; Utilities; Transportation Planning and Engineering)

Local Stakeholder Groups:

3. Economic Development and Tourism Advisory Committee
4. Sherwood Park and District Chamber of Commerce
5. Beaver Hills Biosphere
6. Strathcona Wilderness Centre
7. Strathcona County Museum and Archives
8. Arts and Culture Council of Strathcona County
9. Volunteer Strathcona
10. Mennonite Heritage Farm
11. Sherwood Park Highland Gathering
12. Erin DiLoreto (resident)

Local Businesses:

13. Barr Estate Winery
14. Remai Group
15. Four Points/Towne Place Suites
16. Sandman Hotel Group
17. Best Western Plus – Sherwood Park
18. Days Inn & Suites by Windham – Sherwood Park
19. The Keg Steakhouse and Bar – Sherwood Park
20. Country Road Greenhouses
21. SurvivorFest24
22. TLGT Studios
23. Wake Creative
24. Infinite Eye Photography
25. Scullywood Inc.
26. Dreamcatcher Association

External Stakeholder Groups:

27. Sturgeon County
28. City of Fort Saskatchewan
29. Go East of Edmonton
30. Elk Island National Park
31. Edmonton Tourism
32. Indigenous Tourism Alberta
33. Alberta Economic Development, Trade and Tourism
34. Travel Alberta
35. RC Strategies + PERC
36. Prairie Wild Consulting

APPENDIX B: MARKET READY STANDARDS

Market Ready Standards are broken down into three categories of "readiness" to assist tourism-related businesses in progressively increasing the quality and professionalism of their operation.[48]

VISITOR READY

These criteria are used to determine if a tourism supplier is ready to offer "visitor ready" product to consumers.

Visitor Ready: Refers to a business which has all of their licenses, permits and insurance in place in order to operate legally.

Criteria

The following criteria must be met if a business is to be classified as "visitor ready". The business must:

- Maintain good standing of all applicable business licenses, insurance, and legislative requirements.
- Maintain a staffed business location with a set schedule of operating hours.
- Provide a contact telephone number or email contact year-round. If closed for season, provide automated response through voicemail and or email.
- Have branded on-site signage.

MARKET READY

These criteria are used to determine if a tourism supplier is ready to offer "market ready" product to consumers.

Market Ready: Refers to a business that markets to potential visitors; communicates with potential visitors year-round, and is ready to accept advanced reservations.

Criteria

The following criteria must be met if a business is to be classified as "market ready". The business must meet visitor ready criteria plus:

- Provide a published pricing policy.
- Have a published consumer billing, payment, and cancellation policy.
- Have marketing materials such as brochure, rack card or website.
- Have site based parking in close proximity.
- During operating season, maintain a 24-48 hour response time; or less, to inquiries and a 24 hour response time to reservation/booking requests.
- Be prepared to communicate and accept reservations by telephone, fax and/or e-mail and provide same day confirmation of booking arrangements.
- Have high resolution images and video footage for promotional and training purposes.
- Have frontline staff who are trained in customer service (such as **WorldHost®** or equivalent customer training program)
- Be an active stakeholder or eligible to become a stakeholder of your local tourism association.

EXPORT READY

These criteria are used to determine if a tourism supplier is ready to offer "export ready" product to international markets.

Export Ready: Refers to a business that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, agrees to trade bookings and a cancellation policy.

Criteria

The following criteria must be met if a business is to be classified as "export ready". The business must meet "visitor and market ready" criteria plus:

- Be in business at least one year, with a proven track record for safe and professional operation.
- Demonstrate an adequate budget and marketing plan that includes international tourism operators.
- Understand the roles played by receptive tour operators, tour operators, travel wholesalers, and retail travel agents and understand rack or retail pricing, agent commissions and wholesale net rates at each level.
- Be willing to include receptive tour operators in your marketing and sales plan and provide contracted wholesale net rates to receptive tour operators.
- Provide detailed pricing and program information to tour operators and wholesalers at least one year in advance of selling season.
- Be prepared to set up billing arrangements with the tour operator, wholesale agency or receptive tour operator.
- If you plan to pursue group business, ensure you are able to accommodate and adapt to the needs of the market (e.g. tour bus access and parking, washroom facilities, maximum group size, group pricing, and frontline staff that speak the language of your target markets).
- Carry adequate insurance (discuss this with your receptive operator as sometimes they can add suppliers to their existing policies at nominal cost).
- Provide support (free or reduced rates) for international media and travel trade familiarization tours.
- Offer currency exchange rates consistent with industry norms.

APPENDIX C: STRATHCONA COUNTY TOURISM ASSET INVENTORY

ASSET CLASSIFICATION LEGEND
UD = Undeveloped Asset
PD = Partially Developed Asset
VR = Visitor Ready Asset
MR = Market Ready Asset
EX = Export Ready Asset
UK = Unknown

CATEGORY: Agricultural Attractions and Experiences

Description: Includes attractions and experiences that have an agricultural-related component (e.g. farm tours and stays, greenhouses, etc.).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Barr Estate Winery	Strathcona County	VR
Greenland Garden Centre	Sherwood Park	VR
The Berry Farm (at Christie's Corner)	Strathcona County	VR
Birch Bay Ranch	Strathcona County	VR
Creek Side Saskatoon Berry Farm	Strathcona County	VR
Aspen Ridge Greenhouses	Strathcona County	VR
Estate Gardens Greenhouse	Strathcona County	VR
Wallish Greenhouse	Strathcona County	VR
South Cooking Lake Greenhouses	South Cooking Lake	VR
Hastings Lake Gardens	Hastings Lake	VR

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Salisbury Greenhouses and Landscaping	Sherwood Park	VR
Colchester Farms	Strathcona County	VR
Courier Equine Park	Ardrossan	VR
Gorsline Stables Limited	Strathcona County	VR
Highland Park Equestian	Ardrossan	VR
Keno Hills Stable and Tack Shop	Strathcona County	VR
Millar Venture Arabians	Strathcona County	VR
Big Island Stables	Strathcona County	VR
Clover Leaf Stables Equestrian Centre	Strathcona County	VR
Rocking Bar Ranch	Strathcona County	VR
Still Meadows Ranch	Strathcona County	VR
Trendsetting Stables	Ardrossan	VR
Paints-Plus Equine Centre	Strathcona County	VR
Dick Laurin's Hay and Sleigh Ride	Strathcona County	VR
Edible Garden	Sherwood Park	PD

CATEGORY: Other Culture and Heritage Attractions and Features

Description: Includes art, culture and heritage attractions and features (other than those that appeared in the western and ag-tourism categories).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Strathcona County Museum & Archives	Sherwood Park	VR
Gallery@501	Sherwood Park	VR
Picture This! Framing and Gallery	Sherwood Park	VR
Smeltzer House Centre for Visual Arts	Sherwood Park	VR
Loft Gallery	Sherwood Park	VR
Bremner House	Strathcona County	VR
Sherwood Park's Heritage Mile	Sherwood Park	VR
Ukrainian Cultural Heritage Village		VR
Mennonite Heritage Farm	Strathcona County	VR

CATEGORY: Culinary Attractions and Experiences

Description: Includes unique dining experiences that may attract visitors.*

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Sherwood Park Bakery	Sherwood Park	VR
JACEK Chocolate Couture	Sherwood Park	VR
Hendrickson Bagels	Sherwood Park	VR
WOW! Factor Desserts	Sherwood Park	VR
Confetti Sweets	Sherwood Park	VR
Baseline Wine and Spirits Co.	Sherwood Park	VR
Sublime Wines	Sherwood Park	VR
Winning Wines Plus	Sherwood Park	VR
Barr Estate Winery	Strathcona County	VR
Kastelen Sausage and Fine Meats	Ardrossan	VR
Country Boyz Pizza Shop	Strathcona County	VR
Country Road Restaurant	Ardrossan	VR
Katie's Crossing	Strathcona County	VR
Sherwood Park Farmers' Market	Sherwood Park	VR
Baseline Farmers' Market	Sherwood Park	VR
Salisbury Farmers' Market	Strathcona County	VR
Branches Fresh Food Experience	Sherwood Park	VR
Café Celeste Bistro	Sherwood Park	VR
Café Haven	Sherwood Park	VR
Common Ground Community Café	Sherwood Park	VR
Roasti Coffee Co.	Sherwood Park	VR
The Bar-B-Q Place	Sherwood Park	VR
Polos Social Lounge	Sherwood Park	VR
Gregg Mediterranean Restaurant	Sherwood Park	VR
Life Italian Restaurant	Sherwood Park	VR
Vivo Ristorante	Sherwood Park	VR
Vicky's Bistro and Wine Bar	Sherwood Park	VR
The Purple Perogy	Sherwood Park	VR
Sumo Sumo Sushi Bar and Grill	Sherwood Park	VR
Yoshi Japanese Restaurant	Sherwood Park	VR
Sawaddee Thai Cuisine	Sherwood Park	VR
Taste of India Express	Sherwood Park	VR
Donair and Shawarma House	Sherwood Park	VR
La Patrona Mexican Food	Sherwood Park	VR
Glow Juicery	Sherwood Park	VR
Mexico Lindo Tacos & Grill	Sherwood Park	VR
Elk Island Spirits Co	Sherwood Park	VR

*Chain restaurants and other commodified food service is not included in this category.

CATEGORY: Natural Attractions and Features

Description: Includes both fully developed attractions or those that may not be formalized now, but could be further developed into tourism experiences or attractions (e.g. informal boat launches, trail systems, aurora borealis).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Cooking Lake-Blackfoot Provincial Recreation Area	North Cooking Lake	PD
Strathcona Wilderness Centre Trails	Strathcona County	VR
Golden Ranches	Strathcona County	PD
Beaver Hills Biodiversity Trail	Strathcona County	PD
Hicks	Strathcona County	PD
Parkway Trail System	Strathcona County	PD
River Valley Alliance Trial	Strathcona County	PD
Sherwood Park Natural Area	Strathcona County	PD
North Cooking Lake Natural Area	Strathcona County	PD
Elk Island National Park		VR
Strathcona Science Provincial Park	Strathcona County	PD

CATEGORY: Festivals and Events

Description: Includes both community festivals/events that primarily attract residents, and tourism festivals/events that primarily attract visitors (e.g. sporting competitions, concerts, celebrations).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Café Patio Series by Qualico Communities	Sherwood Park	VR
Josephburg Presents Community Theatre	Josephburg	VR
The Great Canadian Trade Fair**	Sherwood Park	VR
Sherwood Park Music Festival**	Sherwood Park	VR
Ardrossan's Old Fashioned Parade and Picnic	Ardrossan	VR
Canada Day Parade	Sherwood Park	VR
Canada Day Festival	Sherwood Park	VR
Savour Local Food and Art Event	Sherwood Park	VR
Highland Games	Sherwood Park	VR
Under the Big Top Camps	Sherwood Park	VR
Ravenwood Experience Music Festival	Sherwood Park	VR
Strathcona Vintage Tractor Pull	Sherwood Park	VR
Christmas in October	Sherwood Park	VR
Remembrance Day Service	Sherwood Park	VR
Celebration of Lights	Sherwood Park	VR
Christmas in the Heartland	Josephburg	VR
Christmas in the County	Strathcona County	VR
New Year's Festival	Sherwood Park	VR

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Rib Fest	Sherwood Park	VR
South Cooking Lake Trail Days	South Cooking Lake	VR
1000 Lights Festival	Sherwood Park	VR
Fall Open House and Play Day	Strathcona County	VR
2020 Slush Cup (Bike-Board-Ski)**	Strathcona County	VR
Dangler Cup Street Hockey Festival	Sherwood Park	VR
2020 Acrobatic Provincial Championships**	Sherwood Park	VR
Canadian Birkie Ski Festival**	Strathcona County	VR
Evergreen Dance Festival	Sherwood Park	VR
Winter Play Day	Sherwood Park	VR
World Snow Day, the Beaver Hills Bioblitz**	Strathcona County	VR
The Summit Sports Collectibles Show**	Sherwood Park	VR
567 Chevy Club Edmonton & Area Swap Meet	Sherwood Park	VR
YEG Pinball & Arcade Expo**	Sherwood Park	VR
Arbor Day	Sherwood Park	VR
Free Community Day (Parade and Picnic)	Ardrossan	VR
2020 Football Alberta Women's National Championship**	Strathcona County	VR
Strathcona County 16th Annual Golf Classic	Sherwood Park	VR
U19 Women's Nationals Alberta Lacrosse Association	Strathcona County	VR
Greater Edmonton Model Train Show	Sherwood Park	VR
Terry Fox Run**	Sherwood Park	VR
Touch of Talent Craft Show	Sherwood Park	VR
SurvivorFest 24 Hour Face	Sherwood Park	VR

*Small/local event

**Large/regional event

CATEGORY: Tour Operators

Description: Includes tours that take place on the water or on land (e.g. jet boat tours, fishing tours, dog sledding).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Bushman Inc.	Sherwood Park	MR
Canoeing at Islet Lake	Strathcona County	VR

CATEGORY: Specialty Shops

Description: Unique establishments that can be further developed into tourism experiences or attractions.

ASSET NAME	LOCATION	ASSET CLASSIFICATION
The Treasure Chest by Country Boyz	Strathcona County	VR
Country Mercantile Store	Sherwood Park	VR
Revolution Boutique	Sherwood Park	VR
KEYLIME Athletic Wear	Sherwood Park	VR
Bridal Debut Gownhouse	Sherwood Park	VR

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Real Spirit Women's Boutique	Sherwood Park	VR
K-Lee Boutique	Sherwood Park	VR
Unboutiqued	Ardrossan	VR
Bella Maas Boutique	Sherwood Park	VR

CATEGORY: Community Facilities, Sporting Facilities and Public Spaces

Description: Includes facilities and/or spaces in the community that are used by residents and could also be used by visitors (e.g. recreation facilities, parks).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Strathcona Wilderness Centre	Ardrossan	MR
Belvedere Golf and Country Club	Sherwood Park	VR
Broadmoor Public Golf Course	Sherwood Park	VR
Country Side Golf Club	Sherwood Park	VR
Fox Run Golf Course	Strathcona County	VR
Legends Golf and Country Club	Strathcona County	VR
Northern Bear Golf Club	Strathcona County	VR
Emerald Hills Leisure Centre	Sherwood Park	VR
Millenium Place	Sherwood Park	VR
Glen Allan Recreation Complex	Sherwood Park	VR
Ardrossan Recreation Complex	Ardrossan	VR
Kinsmen Leisure Centre	Sherwood Park	VR
Strathcona County Bike Skills Park	Sherwood Park	PD
Heritage Hills Childrens' Pump Track	Sherwood Park	PD

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Millenium Place Skatepark	Sherwood Park	PD
Spark Centre	Sherwood Park	VR
Moyer Recreation Centre	Josephburg	VR
Strathcona County Library	Sherwood Park	VR
Sunridge Ski Area	Edmonton	MR
Broadmoor Lake Park	Sherwood Park	PD
Strathcona Olympiette Centre	Strathcona County	VR
Pollinator Habitat	Sherwood Park	PD
Sally Stewart Off-leash Dog Park	Sherwood Park	PD
Deermound Off-leash Dog Park	Strathcona County	PD
ArrKann Spray Park and Playground	Ardrossan	PD

CATEGORY: Entertainment Facilities

Description: Includes entertainment facilities that are used by residents and can also be used by visitors (e.g. theatres, casinos).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Festival Place	Sherwood Park	MR
Galaxy Cinemas Sherwood Park	Sherwood Park	VR
The Golf Den	Sherwood Park	VR
Long Shotz Driving Range and Golf Academy	Sherwood Park	VR
Fun Park Amusement Centre	Sherwood Park	VR
Delta Force Paintball	Strathcona County	VR
Sherwood Bowl	Sherwood Park	VR

CATEGORY: Fixed Roof Accommodations

Description: Includes all fixed roof accommodations.

ASSET NAME	LOCATION	TYPE OF ACCOMMODATION	NUMBER OF ROOMS	ASSET CLASSIFICATION
Holiday Inn Express and Suites	Sherwood Park	Hotel	90	MR
Best Western Plus Inn and Suites	Sherwood Park	Hotel	90	MR
Clarion Hotel and Conference Centre	Sherwood Park	Hotel	258	MR
Days Inn and Suites by Wyndham	Sherwood Park	Hotel	118	MR
Ramada	Sherwood Park	Hotel	63	MR
Hampton Inn by Hilton	Sherwood Park	Hotel	121	MR
Four Points by Sheraton	Sherwood Park	Hotel	135	MR
Park Centre and Hotel	Sherwood Park	Hotel	40	MR
Sandman Signature Hotel	Sherwood Park	Hotel	229	MR
TownePlace Suites by Marriott	Sherwood Park	Hotel	105	MR
Super 8 by Wyndham	Sherwood Park	Hotel	120	MR
Prairie Sunset Bed and Breakfast	Strathcona County	B&B	3	VR
Maggie's Hill Heritage Log House	Sherwood Park	Other	3	VR

CATEGORY: Campgrounds

Description: Includes all RV and camp site accommodations.

ASSET NAME	LOCATION	TYPE OF ACCOMMODATION	NUMBER OF RV SITES	NUMBER OF CAMP SITES	ASSET CLASSIFICATION
Van-Es Camp and Conference Centre	Sherwood Park	Other			VR
Half Moon Lake Resort	Strathcona County	RV and Camp Sites	276	17	VR
Elk Island Retreat	Strathcona County	RV and Camp Sites	36	6	VR
Kawtikh Retreat	Strathcona County	RV only	58		VR
Astotin Lake Campground, Elk Island National Park	Strathcona County			75	VR
Strathcona Wilderness Centre	Strathcona County	Camp only		4	VR
Oster Lake Backcountry Campground		Camp only		6	VR

CATEGORY: Meeting and Convention Facilities

Description: Includes facilities that can host meetings, conferences, conventions or exhibitions (e.g. Red Feather Ridge).

ASSET NAME	LOCATION	ASSET CLASSIFICATION
Van-Es Camp and Conference Centre	Sherwood Park	MR
Strathcona County Community Centre	Sherwood Park	MR
Clarion Hotel and Conference Centre	Sherwood Park	MR
Days Inn and Suites by Wyndham	Sherwood Park	MR
Ramada	Sherwood Park	MR
Four Points by Sheraton	Sherwood Park	MR
Sandman Signature Hotel	Sherwood Park	MR
TownePlace Suites by Marriott	Sherwood Park	MR
Super 8 by Wyndham	Sherwood Park	MR

APPENDIX D: WHAT WE HEARD REPORT

What We Heard Report

Strathcona County Tourism Strategy and Implementation Plan

APRIL 8, 2020

STRATHCONA COUNTY

expedition
MANAGEMENT CONSULTING

expedition
MANAGEMENT CONSULTING

April 8, 2020

Richard MacDonald
Small Business and Tourism Specialist
Strathcona County
160 Festival Way
Sherwood Park, Alberta T8A 5Z2

Dear Mr. MacDonald,

Please find enclosed the What We Heard Report to conclude the community and stakeholder engagement components of Phase 2 of the Strathcona County Tourism Strategy and Implementation Plan project.

If you have any questions or require clarification on the attached report, please feel free to contact me at 780-266-7888.

Sincerely,

Justin Rousseau, Managing Director
Expedition Management Consulting Ltd.

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ACKNOWLEDGEMENTS

We would like to acknowledge all the residents, businesses, community groups, County staff, and other stakeholders who took time to share their thoughts and ideas on tourism development in Strathcona County. This What We Heard Report would not have been possible without them, and their input was essential to move this community-driven project forward. Thank you.

EXECUTIVE SUMMARY

SCOPE OF THE REPORT

This report contains the findings from the public engagement activities completed during Phase 2 of the Strathcona County Tourism Strategy and Implementation Plan project. This What We Heard Report will be used in conjunction with other inputs to develop initial recommendations and direction for the Tourism Strategy in Phase 3. The findings from a high level SWOT analysis and a STEEP analysis have also been included as part of this report (see Appendix A).

OVERVIEW OF RESEARCH

A variety of public engagement activities were conducted to develop this report. These activities included two separate surveys (Resident and Stakeholder), facilitated input workshops with stakeholders, County staff and the public, interviews with local and regional stakeholders interested in tourism, interviews with County Council, and a public engagement station at Millennium Place. A summary of the engagement activities completed is provided next in Figure 1.

Figure 1. Participation in Engagement Activities

PUBLIC ENGAGEMENT ACTIVITY	NUMBER OF PARTICIPANTS
Resident Survey	281
Stakeholder Survey	15 groups represented
Stakeholder Interviews	18
Stakeholder Input Tourism Cafés	23 attendees and 16 groups represented
Public Engagement Station	21
Councillor Interviews	9
Staff Input Sessions	26
Total	**393**

KEY THEMES AND DESTINATION ANALYSIS

The following describes 8 key themes that were synthesized by the consulting team from the community engagements, asset inventory and other research.

1. STRONG SUPPORT FOR TOURISM DEVELOPMENT AMONG MANY STAKEHOLDER GROUPS

Historically, tourism has not been a focus of development efforts in Strathcona County. However, there is now strong support among numerous stakeholder groups to further develop tourism. These stakeholder groups include local businesses, community organizations, festivals and events, and government representatives. There is recognition of the potential tourism has to diversify Strathcona County's economy and positively impact the community.

2. LACK OF AWARENESS OF TOURISM AMONG SOME SEGMENTS OF THE POPULATION

Through the engagement process, there appeared to be a lack of awareness from some residents around what tourism is and what developing the industry might entail. This signifies a potential need for education on the tourism industry. Specifically, the promotion of its benefits and a clear description of how tourism relates to Strathcona County and the community's objectives.

3. NEED FOR A UNIFYING VISION

There is a need for a unifying vision for tourism development that will set the destination on a path toward sustainable growth. In general, stakeholders envisioned a local tourism industry that:

- Provides exceptional experiences that will keep visitors coming back again and again.
- Clearly differentiates Strathcona County from competing destinations.
- Diversifies the local economy and generates benefits for local businesses, residents and organizations.
- Is highly collaborative with multiple stakeholder groups contributing to its success.

4. ORGANIZING FOR TOURISM DEVELOPMENT

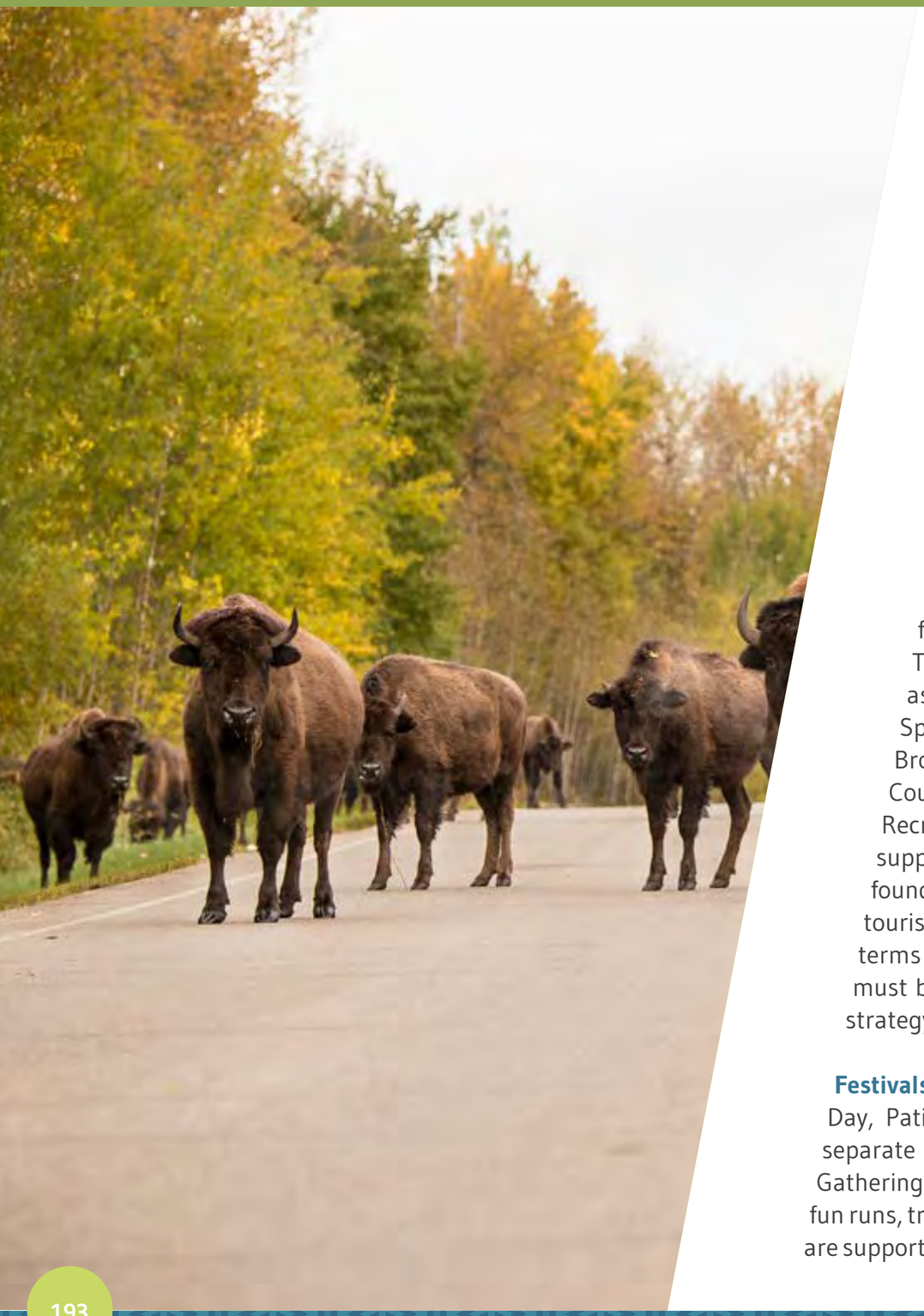
Strathcona County's tourism sector is fragmented and lacking collaboration. Tourism development and marketing activities of existing organizations are limited, often siloed and there is a lack of role clarity. There is a need to organize the community under an overarching framework that will deploy their resources, expertise and capacity in an efficient and coordinated manner to develop tourism.

5. WILLINGNESS TO COLLABORATE AND PARTNER

There is a clear sense of optimism among stakeholder groups and a desire to work together to achieve tourism objectives. For tourism to reach its full potential, multiple sectors and a broad range of stakeholders will need to be engaged. The benefits of collaboration include leveraged resources, information sharing and enhanced communication.

6. LACK OF TOURISM PRODUCTS AND OPERATORS

Residents and stakeholders identified many high quality tourism assets in Strathcona County. However, through our analysis we identified that many of these assets are currently underdeveloped and are not being packaged in a compelling way. There are limited market ready experiences available to visitors, and Strathcona County lacks anchor attractions that are positioned to differentiate the destination in the mind of visitors. Additionally, there are limited supports for tourism operators who are faced with challenges ranging from human resource issues, a lack of marketing and funding support, and other challenges.



7. OPPORTUNITIES FOR PRODUCT DEVELOPMENT

The following opportunities for product development were identified through the community engagement process, gap analysis and other research.

Nature-based Tourism – Strathcona County's special geographies, diverse environments and protected areas are recognized as key tourism assets. Attractions such as the Beaver Hills Biosphere, Strathcona Wilderness Centre, Elk Island National Park and the North Saskatchewan River Valley provide excellent opportunities to develop nature-based tourism offerings.

Sport Tourism – Strathcona County is known for delivering high quality sport tourism events. The municipality has excellent recreation assets, such as Millennium Place, Emerald Hills Sports Pavilion, Strathcona Wilderness Centre, Broadmoor Lake Park and others. Strathcona County has invested in the deployment of its Recreation, Parks and Culture Department to support sport tourism. This provides a strong foundation upon which to further develop sport tourism experiences. There are capacity issues in terms of infrastructure and human resources that must be considered through the development of the strategy.

Festivals and Events – Strathcona County hosts Canada Day, Patio Series, PlayDays throughout the year and separate community led events such as the Highland Gathering, Canadian Birkebeiner Ski Festival, numerous fun runs, tractor pulls, tradeshows and more. These events are supported by excellent indoor and outdoor spaces, such as Festival Place and Broadmoor Lake Park. In addition, the sport groups in the community are motivated to showcase their athletes and their community through regional, provincial, national and international sport competitions.

Culture and Heritage – Strathcona County has a rich and diverse history that can be leveraged to create tourism experiences. The stories of Indigenous peoples and European settlers contribute to the history of the area and would be of interest to certain traveler segments. Strathcona County also has strong links to its agricultural heritage, the energy industry and equine pursuits. Built assets, such as the Strathcona County Museums and Archives, the nearby Ukrainian Cultural Heritage Village, and the future multipurpose agricultural facility can all be utilized to a greater degree as cultural tourism attractions.

Agritourism/Culinary – There are strong agricultural roots in Strathcona County and the local agriculture industry is an important driver of the economy. There is opportunity to leverage these assets to develop authentic agritourism and culinary tourism offerings, such as farm stays or long table dinners.

Visiting Friends and Relatives – Strathcona County residents expressed strong support for increasing and enhancing tourism products that appeal to the visiting friends and relatives market (VFR). 71% of respondents to the resident survey were likely or very likely to invite their friends and family to visit within the next two years. Capitalizing on this demand is seen as a powerful way to grow tourism.

8. ENHANCED TOURISM MARKETING

Stakeholders expressed a strong desire for enhanced tourism marketing in Strathcona County. It is important for the County to have a clear tourism brand, specified target markets and coordinated marketing activities. There is a distinct opportunity to align tourism marketing activities to reach larger audiences and attract more visitors.

NEXT STEPS

This document summarizes the Phase 2 public engagement activities included as part of the Strathcona County Tourism Strategy and Implementation Plan. The research contained within this report will be used to support Phase 3 - Destination Analysis and Opportunity Assessment.

The community will have an opportunity to provide feedback on the draft tourism strategy during Phase 4 of the project. County Council will receive a presentation on the draft tourism strategy following this next round of engagement, and the final tourism strategy will incorporate this feedback.

1 PROJECT OVERVIEW

SCOPE OF THE REPORT

This report contains the findings from the public engagement activities completed during Phase 2 of the Strathcona County Tourism Strategy and Implementation Plan project. This What We Heard Report will be used in conjunction with other inputs to develop initial recommendations and direction for the Tourism Strategy in Phase 3. The findings from a high level SWOT analysis and a STEEP analysis have also been included as part of this report (see Appendix A).

PROJECT BACKGROUND

Strathcona County commissioned this study to review the current state of tourism in the community and develop a strategy for its future development. Tourism can enhance quality of life for residents and assist major employers in the area with talent attraction by creating a stronger sense of place. It can also support the County's primary economic sectors, while cultivating economic diversification. Research suggests that tourism is an $8.9 billion dollar industry in Alberta and is an important growth sector in this province.[1] Travel Alberta is also working on a 10-year tourism strategy, which Strathcona County is participating in. For the purposes of this report, tourism is defined as:[2]

"The activities of people travelling to places outside their usual environment for leisure, business or other purposes for not more than one consecutive year."

The purpose of this project is to develop a strategy that provides a shared vision for tourism in Strathcona County, a framework for stakeholders to collaborate, and a direction for tourism development over the next 10 years.

PROCESS

The Strathcona County Tourism Strategy and Implementation Plan project has five phases. This report represents the completion of the public engagement in Phase 2.

OVERVIEW OF PUBLIC ENGAGEMENT ACTIVITIES

A variety of public engagement activities were conducted to develop this report. These activities included two separate surveys (Resident and Stakeholder), facilitated input workshops with stakeholders, County staff and the public, interviews with local and regional stakeholders interested in tourism, interviews with County Council, and a public engagement station at Millennium Place. The following list is an overview of the public engagement activities completed during Phase 2.

1. **Surveys Administered:**
    a. Strathcona County Resident Survey (281 responses)
    b. Strathcona County Stakeholder Survey (15 responses)

2. **Meetings Conducted:**
    a. Sub-Committee Project Meetings

        Dates: July 24, 2019; September 9, 2019; October 9, 2019; December 18, 2019; February 20, 2020.
        Purpose: project management and input.
        Membership: Strathcona County - Richard MacDonald, Shane Olson, Jennifer Moncion, Sarah Geisler; Expedition Management Consulting - Maxwell Harrison, Justin Rousseau

    b. Steering Committee Meeting

        Date: October 2, 2019
        Purpose: inform the committee of the process and gain input.
        Membership: Shane Olson, Richard MacDonald, Russ Pawlyk, Suzanne Lobb – Strathcona County; Todd Banks – Sherwood Park & District Chamber of Commerce; Jaspreet Bhatia – Marriott Townplace Suites; Brian Ilnicki – Beaver Hills Biosphere; Caryn MacGregor – Strathcona County Museum and Archives; Rick Barr – Barr Estate Winery; Michael Callihoo – The Keg.

c. Stakeholder Input Tourism Cafés (x2)

Date: November 14, 2019
Purpose: inform stakeholders of the process and gain input on opportunities, challenges and future vision.
Number of Attendees: 23
Groups Represented: 16

d. Public Engagement Station

Date: November 14, 2019
Purpose: collect resident surveys and gain input from the public.
Number of Attendees: 21

e. Staff Input Sessions (x2)

Date: January 15, 2020
Purpose: inform staff of the process and gain input.
Number of Attendees: 26
Departments Represented: 8

3. Tourism Stakeholders Consulted:

a. Invites were sent out by County staff to over 800 potential stakeholder groups in the County. In total, 36 unique stakeholder groups chose to participate in the engagement process, including local tourism operators and representatives of the following organizations:

Municipal Government:

1. Strathcona County Council
2. Strathcona County Administration

Local Stakeholder Groups:

3. Economic Development and Tourism Advisory Committee
4. Sherwood Park and District Chamber of Commerce
5. Beaver Hills Biosphere
6. Strathcona Wilderness Centre
7. Strathcona County Museum and Archives
8. Arts and Culture Council of Strathcona County
9. Volunteer Strathcona
10. Mennonite Heritage Farm
11. Sherwood Park Highland Gathering
12. Erin DiLoreto

Local Businesses:

13. Barr Estate Winery
14. Remai Group
15. Four Points/Towne Place Suites
16. Sandman Hotel Group
17. Best Western Plus – Sherwood Park
18. Days Inn & Suites by Windham – Sherwood Park
19. The Keg Steakhouse and Bar - Sherwood Park
20. Country Road Greenhouses
21. SurvivorFest24
22. TLGT Studios
23. Wake Creative
24. Infinite Eye Photography
25. Scullywood Inc.
26. Dreamcatcher Association

External Stakeholder Groups:

27. Sturgeon County
28. City of Fort Saskatchewan
29. Go East of Edmonton
30. Elk Island National Park
31. Edmonton Tourism
32. Indigenous Tourism Alberta
33. Alberta Economic Development, Trade and Tourism
34. Travel Alberta
35. RC Strategies + PERC
36. Prairie Wild Consulting

2 PUBLIC ENGAGEMENT PROCESS RESULTS

SUMMARY OF PUBLIC ENGAGEMENT ACTIVITIES

Input from Strathcona County's residents, Councillors, administration and tourism stakeholders was gathered from September 16, 2019 – January 15, 2020. In total, 393 people were engaged through the public engagement process. A summary of the engagement activities completed is provided next in Figure 1.

Figure 1. Participation in Engagement Activities

PUBLIC ENGAGEMENT ACTIVITY	NUMBER OF PARTICIPANTS
Resident Survey	281
Stakeholder Survey	15 groups represented
Stakeholder Interviews	18
Stakeholder Input Tourism Cafés	23 attendees and 16 groups represented
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Councillor Interviews	9
Staff Input Sessions	26
Total	**393**

RESIDENT SURVEY

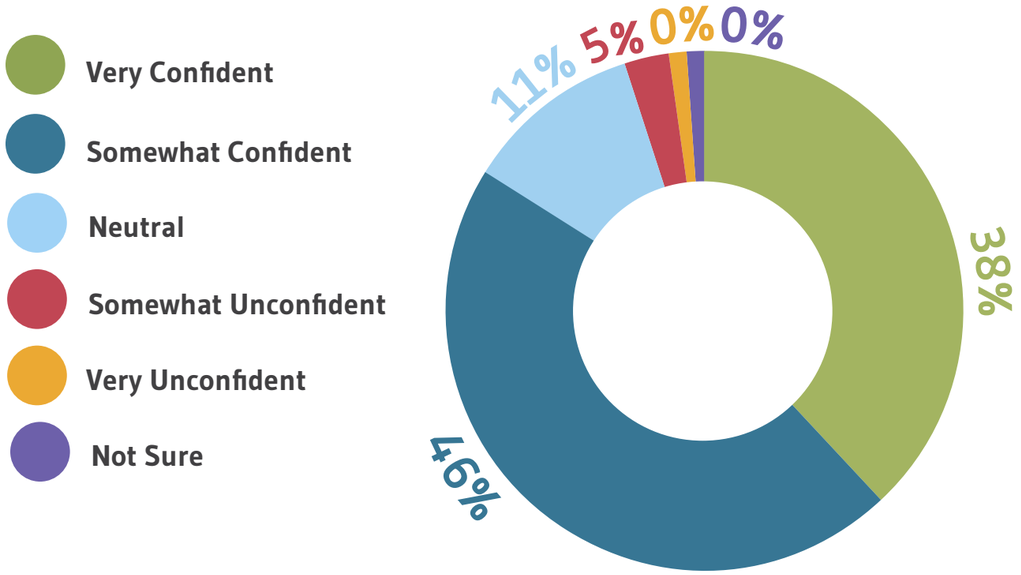
The resident survey was conducted between October 30, 2019 and November 20, 2019. The objective of the resident survey was to gain a deeper understanding of resident perspectives in relation to tourism development in the County.

Strathcona County's online survey platforms were used to collect the data (SurveyGizmo and SCOOP - Strathcona County Online Opinion Panel). The survey was promoted through the municipal website, social media posts, e-newsletters (public engagement, SCOOP platform, Economic Development and Tourism), newspaper ads and posters. In total, 281 responses were received.

FINDINGS FROM THE RESIDENT SURVEY

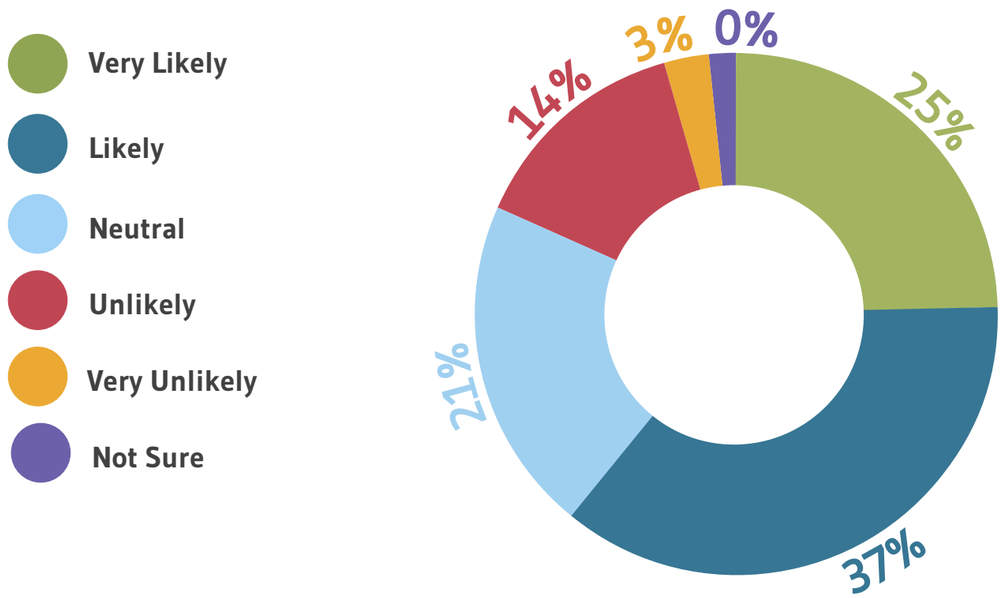
1) Respondents were asked how confident they feel answering basic visitor questions about Strathcona County (e.g. what there is to do for fun, where to stay, where to eat, etc.). 84% of respondents felt very or somewhat confident answering basic visitor questions.

Question: How confident do you feel answering basic visitor questions about Strathcona County?



2) The majority of respondents were likely to recommend Strathcona County as a place for others to visit (62%). However, a significant percentage of respondents were neutral (21%) or unlikely (17%) to recommend the County as a place to visit.

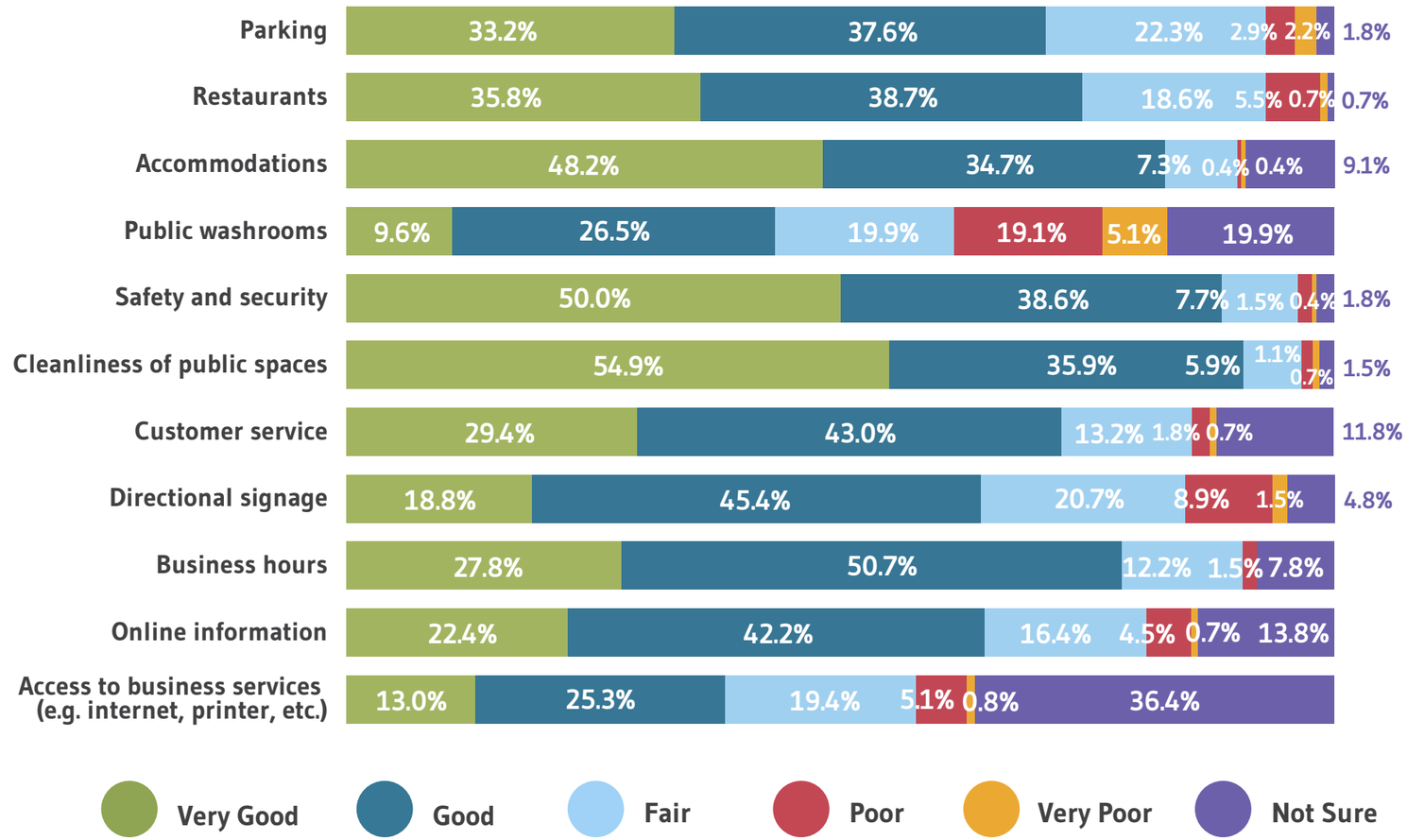
Question: How likely are you to recommend Strathcona County as a place for others to visit?



3) County residents were able to identify excellent tourism assets, including community recreation facilities, outdoor spaces and experiences, events and more. Commonly identified assets included Millennium Place, Strathcona Wilderness Centre, Beaver Hills Biosphere, Festival Place, large sporting events, and Elk Island National Park. All of the assets identified by residents will be reviewed during the development of a Tourism Asset Inventory for the County.

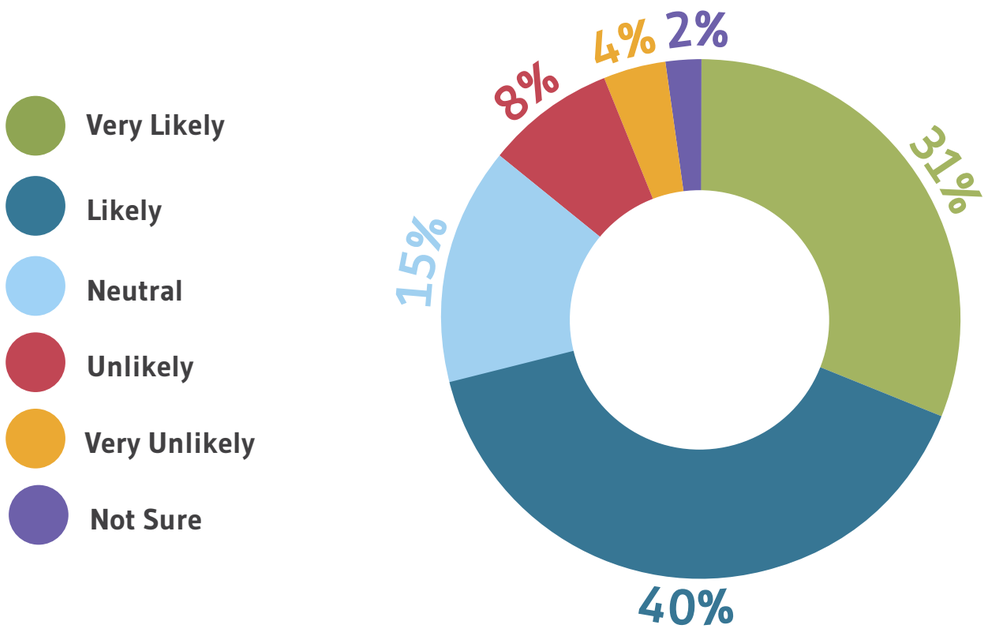
4) Visitor amenities rated highly by respondents included cleanliness of public spaces (55% very good and 36% good), safety and security (50% very good and 39% good) and accommodations (48% very good and 35% good). Visitor amenities rated poorly by respondents included public washrooms (19% poor and 5% very poor), directional signage (9% poor and 1% very poor), and restaurants (5% poor and 1% very poor).

Question: Please rate the following local visitor services and support amenities.



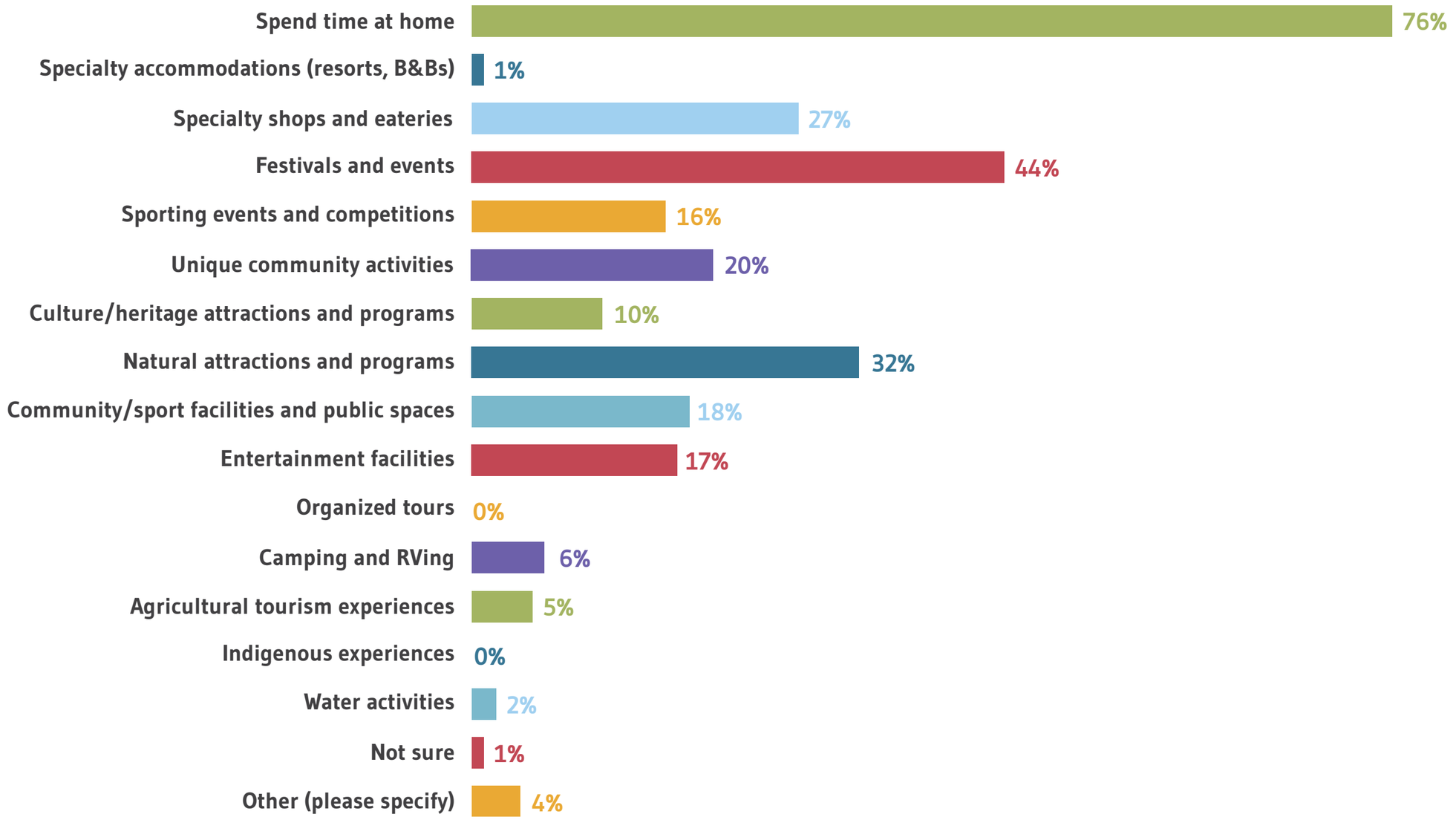
5) 71% of respondents were likely or very likely to invite their friends and family to visit Strathcona County within the next two years.

Question: How likely are you to invite your friends and/or family to visit Strathcona County within the next two years?



6) The top three activities respondents enjoy doing with their friends and family were spending time at their residence (76%), attending festivals and events (44%), and natural attractions and programs (32%).*

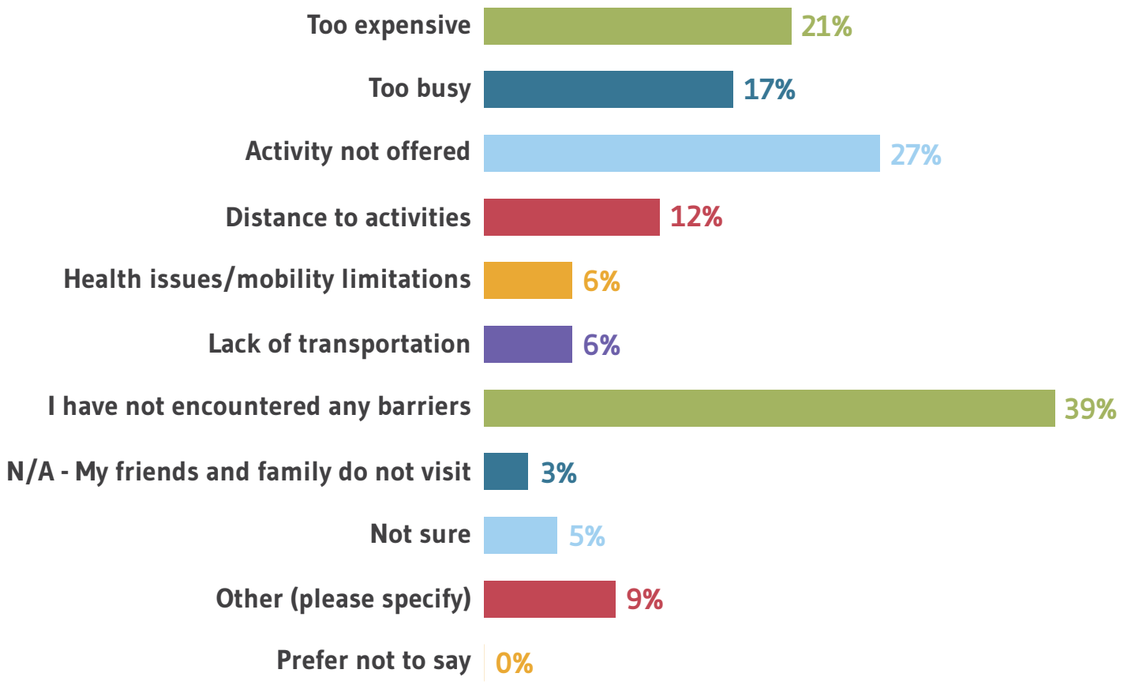
Question: What types of activities do you most like to do with friends and family when they visit?



*Multiple responses were accepted for this question, which is why the totals add up to more than 100%.

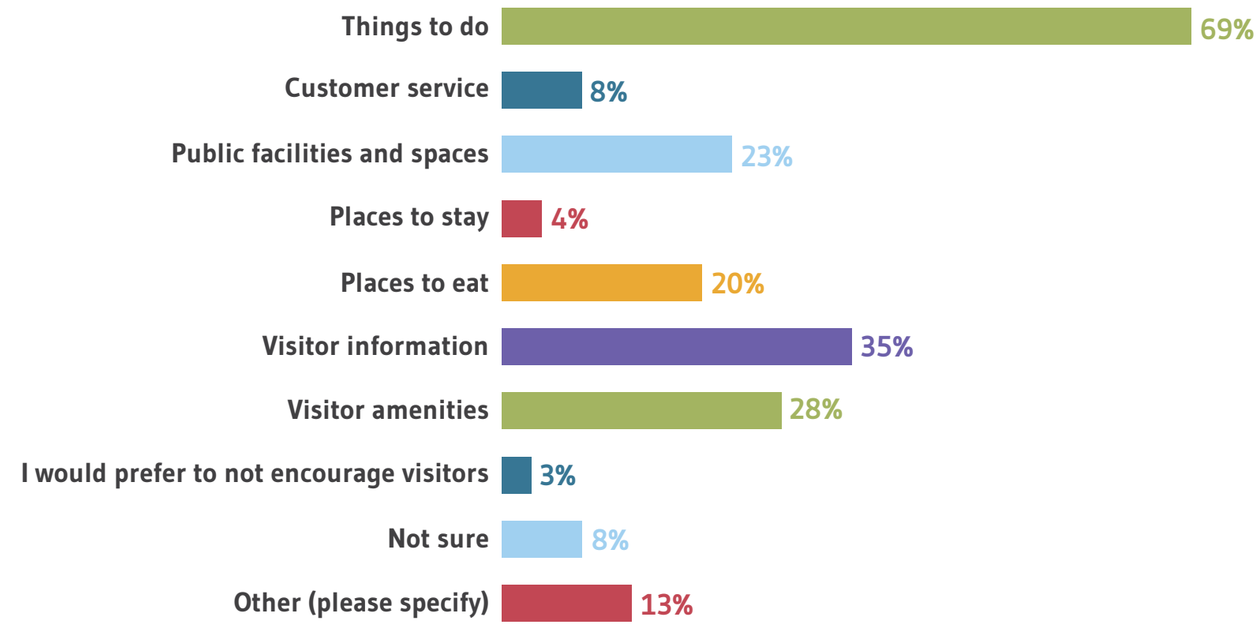
7) The biggest barriers to participation in activities with family and friends included activity not offered (27%), too expensive (21%) and too busy (17%). Notably, 39% of respondents said they have not encountered any barriers.*

Question: When your friends and family visit, which barriers, if any, prevent you from participating in any activities?



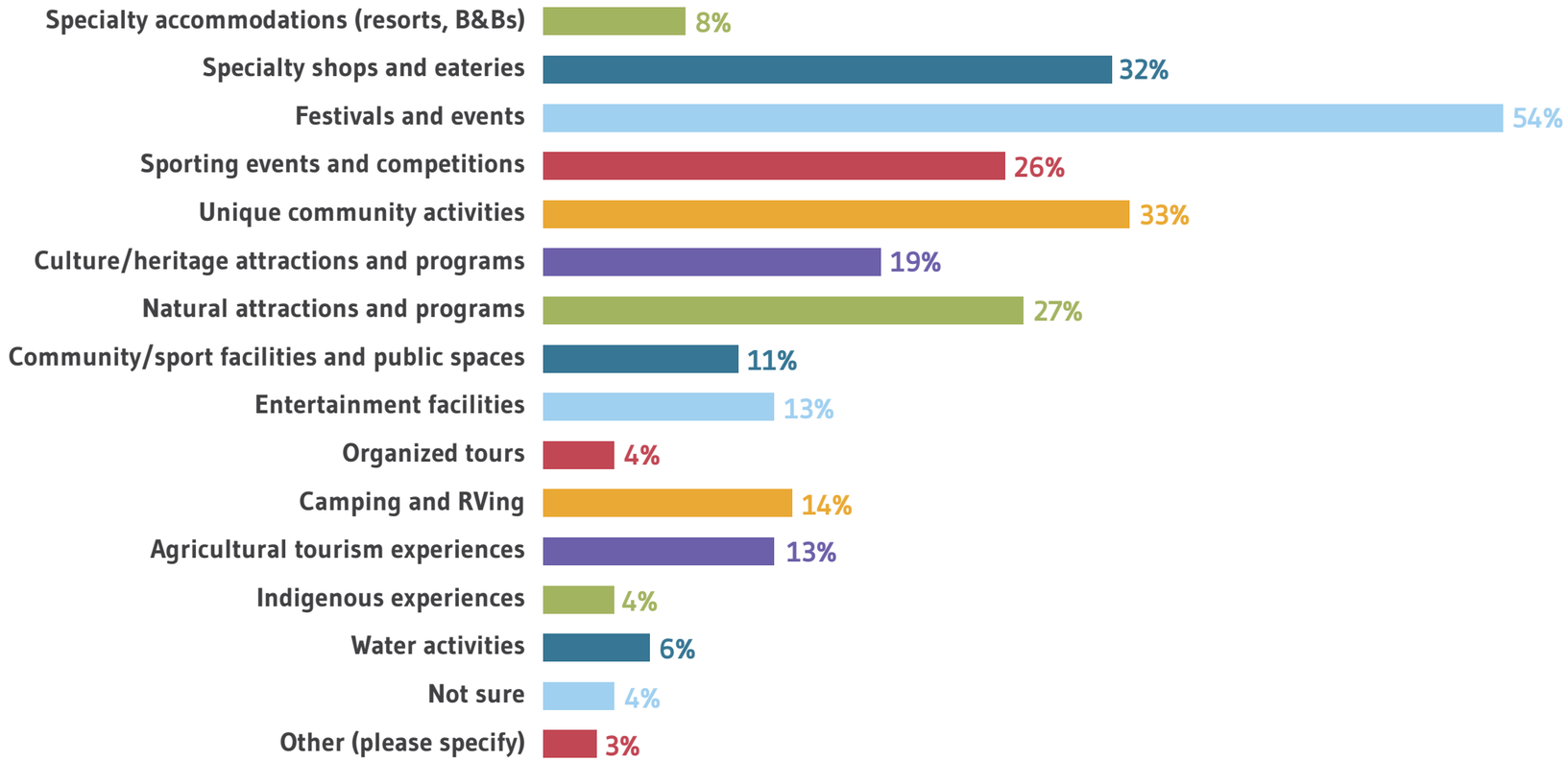
8) In order to encourage more visitation to the County, respondents said the community could most improve on things to do (69%), visitor information (35%) and visitor amenities (28%).*

Question: In order to encourage more visitors to come to Strathcona County, what do you think the community could most improve on?



9) The top amenities respondents thought had the greatest potential to be developed to encourage visitation were festivals and events (54%), unique community activities (33%), specialty shops and eateries (32%), natural attractions and programs (27%) and sporting events and competitions (26%).*

Question: What types of amenities have the greatest potential to be developed to encourage visitation to Strathcona County?



In order to encourage more visitation, respondents felt the community could further develop festivals and events, unique community activities, specialty shops and eateries, natural attractions and sporting events.

TOURISM STAKEHOLDER SURVEY

An online survey of tourism stakeholders in Strathcona County was conducted between October 30, 2019 and November 20, 2019. The objective of the stakeholder survey was to gain a deeper understanding of stakeholder perspectives in relation to tourism development.

Strathcona County's SurveyGizmo platform was used to collect the data. Strathcona County promoted the survey through its municipal website, social media accounts, e-newsletters by emails to known stakeholder contacts. In total, 15 responses were received.

FINDINGS FROM THE TOURISM STAKEHOLDER SURVEY

1) All stakeholders who responded to the survey thought that tourism has the potential to support the goals of their organizations. The quotes below explain why some stakeholders thought this.

"Tourism increases revenues to local businesses."

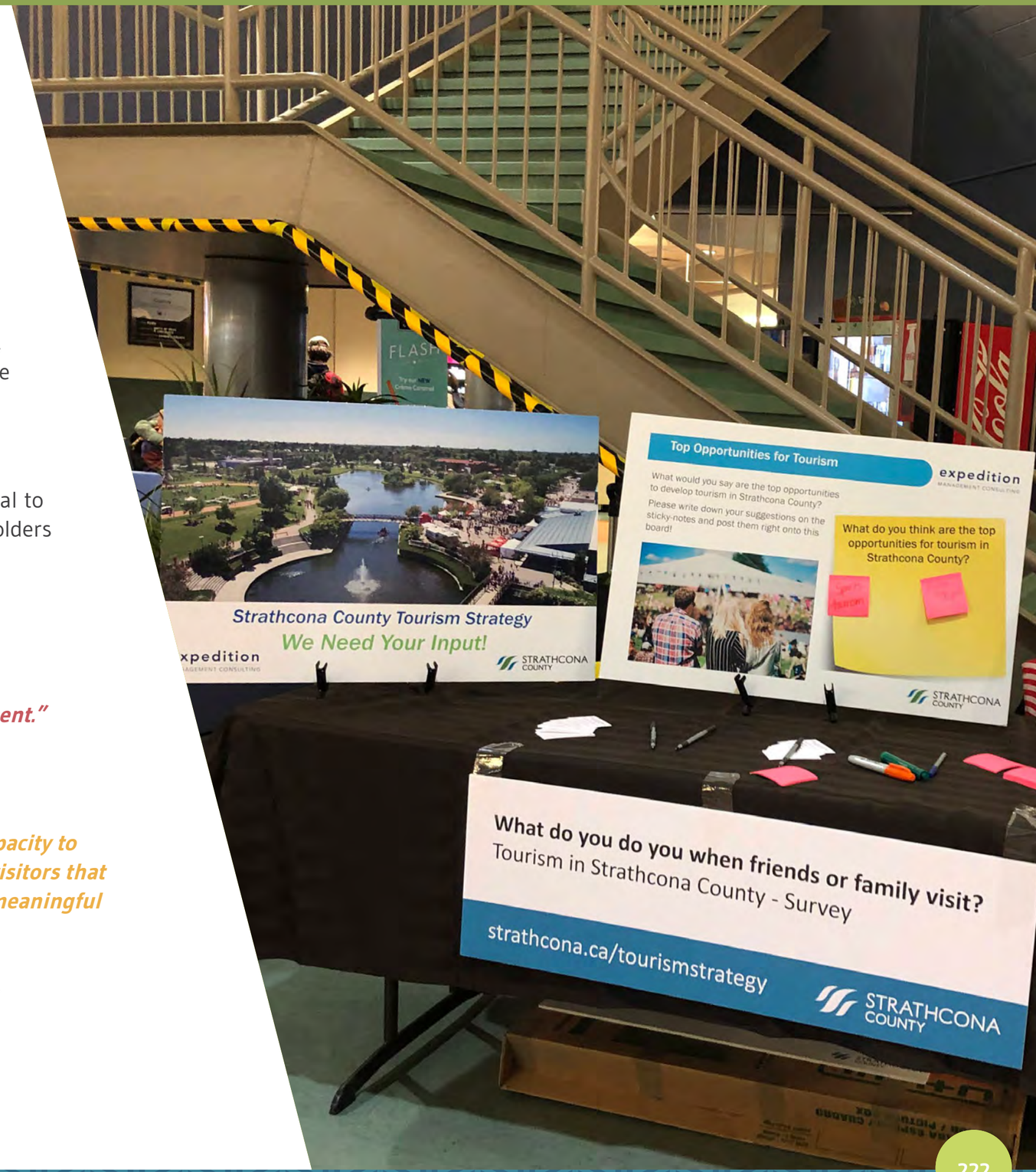
"Tourism generates economic development."

"Tourism is an industry that can potentially diversify economic growth in the region."

"Art, culture and entertainment has the capacity to bring the community together and to attract visitors that benefit local businesses in an impactful and meaningful way."

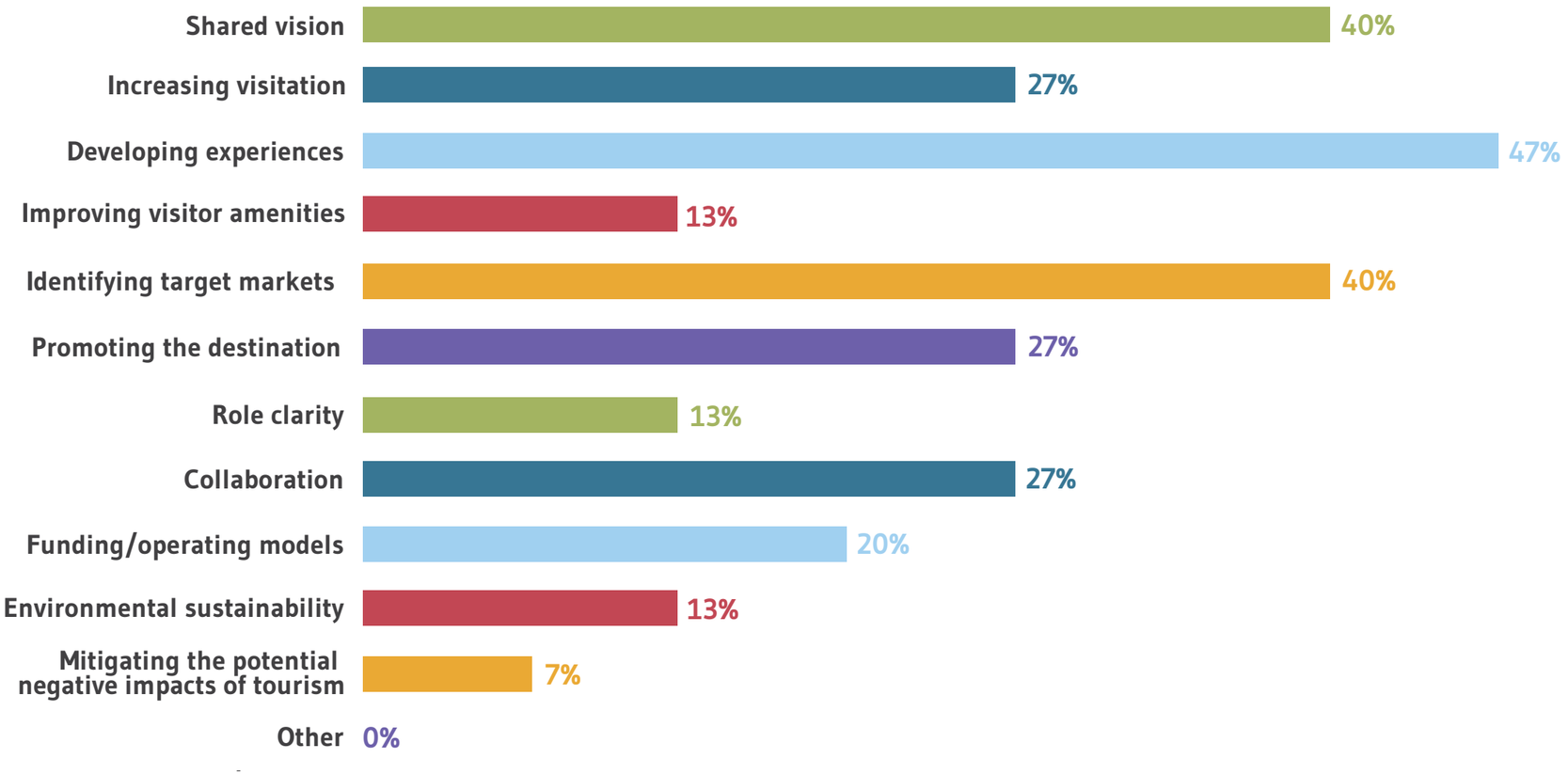
"Tourism supports the RV industry."

"Tourists often purchase local art."



2) The top three issues respondents identified to focus on during the development of the Tourism Strategy included developing experiences for visitors (47%), identifying target markets for tourism (40%), and creating a shared vision for the future of tourism (40%).*

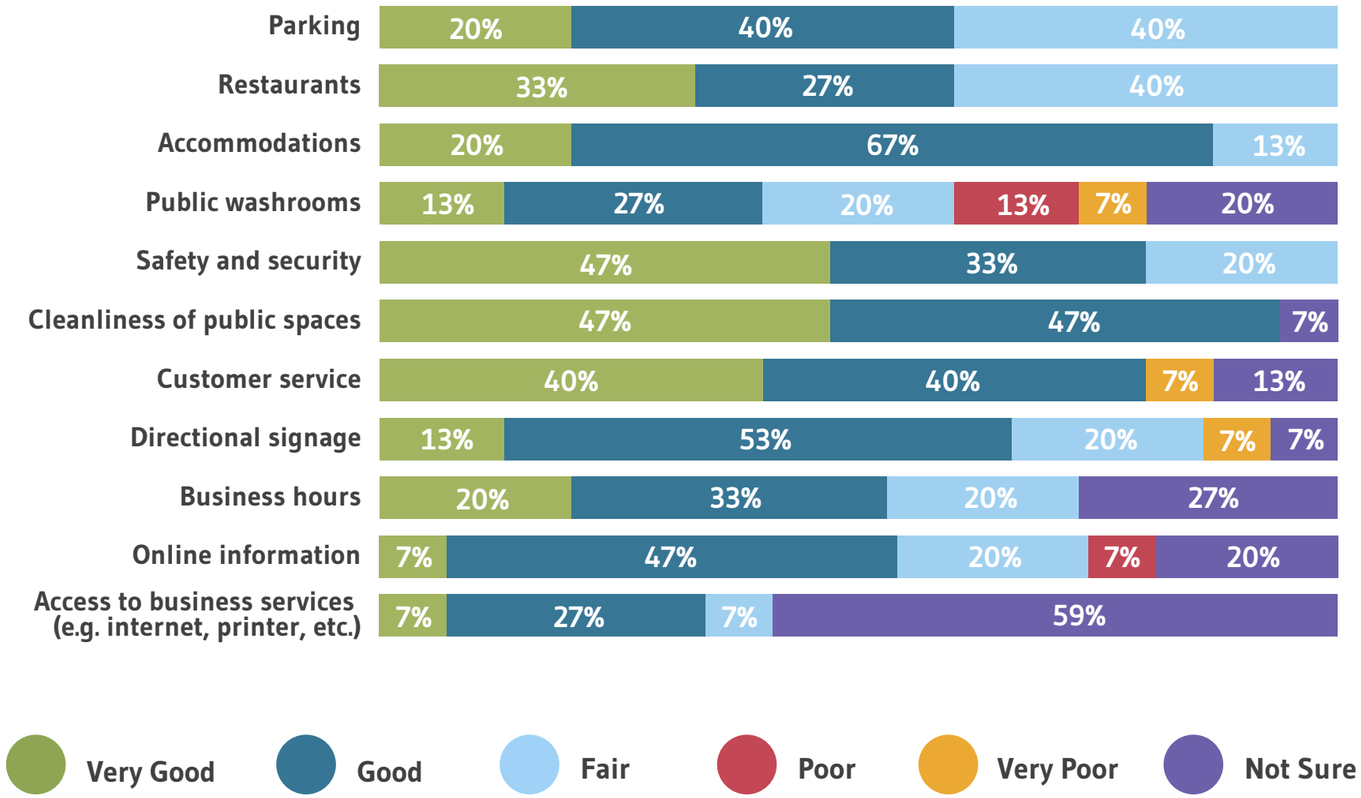
Question: As we begin developing the tourism strategy for Strathcona County, what do you think are the top three issues to focus on?



*Multiple responses were accepted for this question, which is why the totals add up to more than 100%.

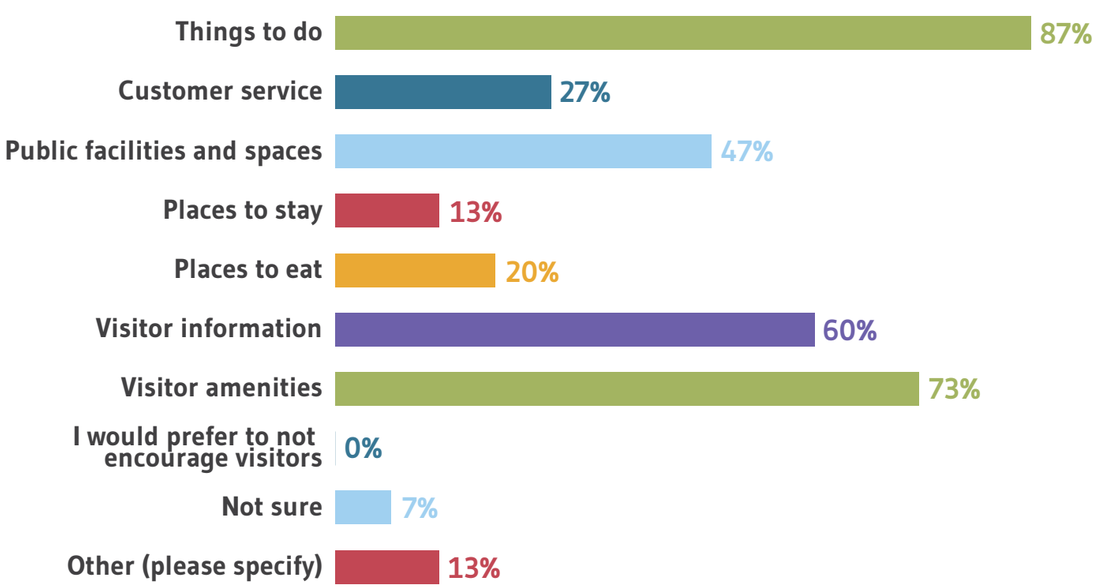
3) Visitor amenities rated highly by respondents included cleanliness of public spaces (47% very good and 47% good), safety and security (47% very good and 33% good) and customer service (40% very good and 40% good). Visitor amenities rated poorly by respondents included public washrooms (13% poor and 7% very poor), directional signage (7% very poor), and online information (7% poor).

Question: Please rate the following local visitor services and support amenities.



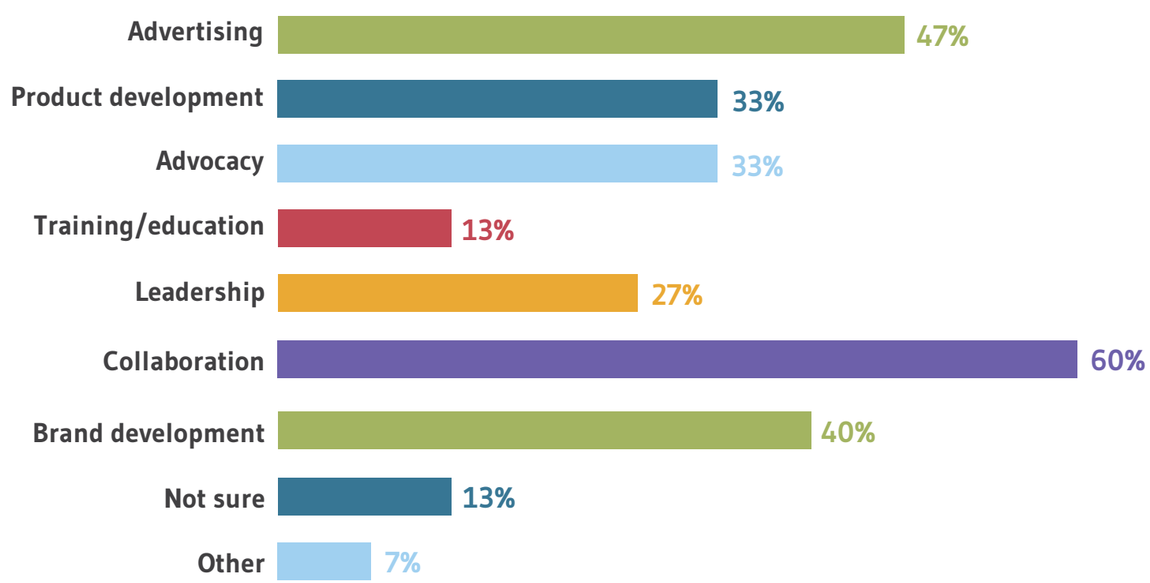
4) In order to encourage more visitation to the County, respondents said the community could most improve on things to do (87%), visitor amenities (73%) and visitor information (60%).*

Question: In order to encourage more visitors to come to Strathcona County, what do you think the community could most improve on?



5) In terms of destination development services most needed by organizations, respondents were most supportive of stakeholder engagement, collaboration and communication (60%), tourism advertising and promotions (47%), and building the Strathcona County tourism brand (40%).*

Question: In the future, what types of destination development services would most help your organization grow tourism in the County?



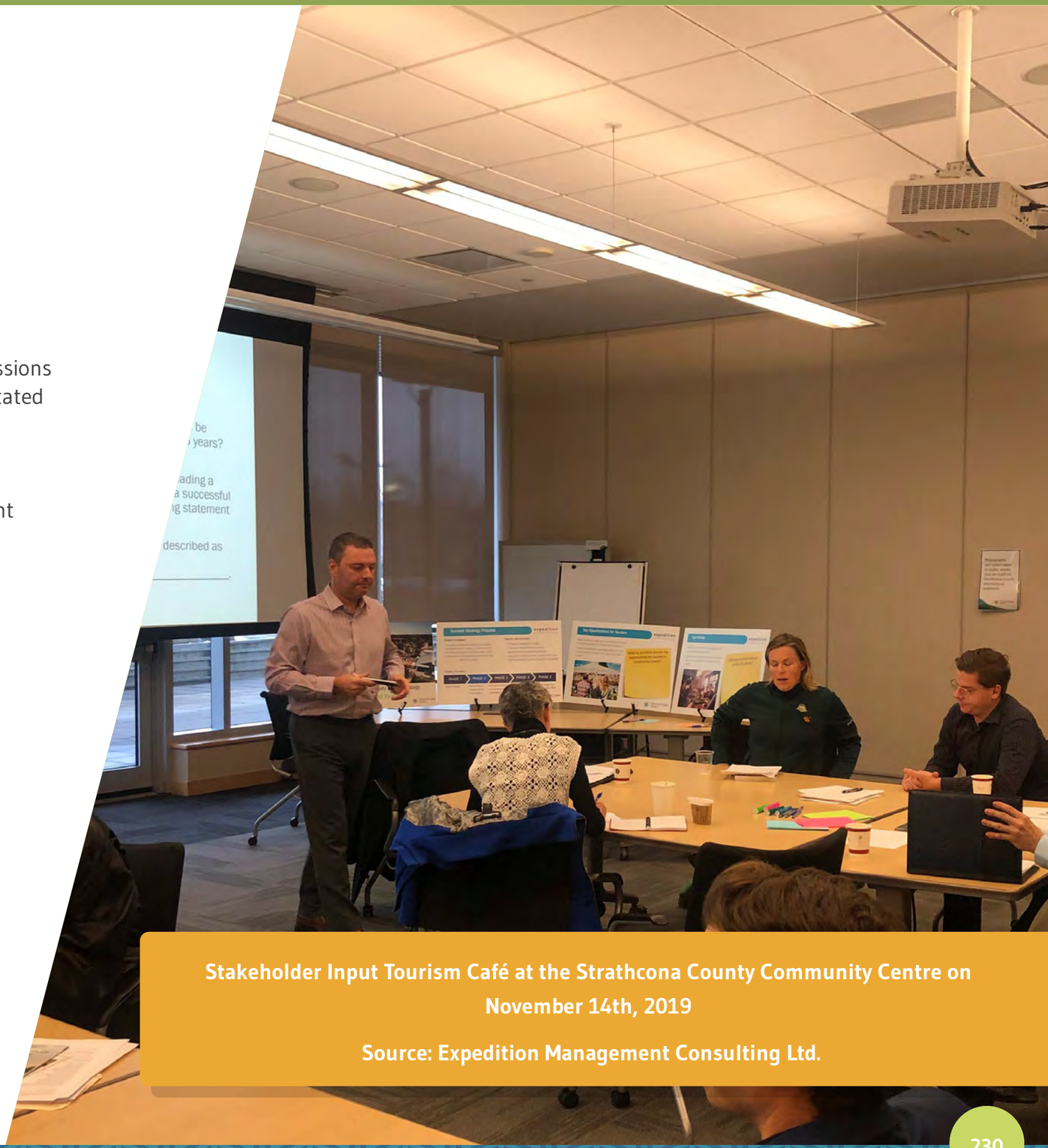
Stakeholders would like to see more stakeholder engagement, collaboration and communication.

STAKEHOLDER INPUT TOURISM CAFÉS

Two Tourism Cafés were hosted in Strathcona County on November 14, 2019. The sessions were led by Expedition Management Consulting and input was gathered through facilitated discussions with participants. Objectives included:

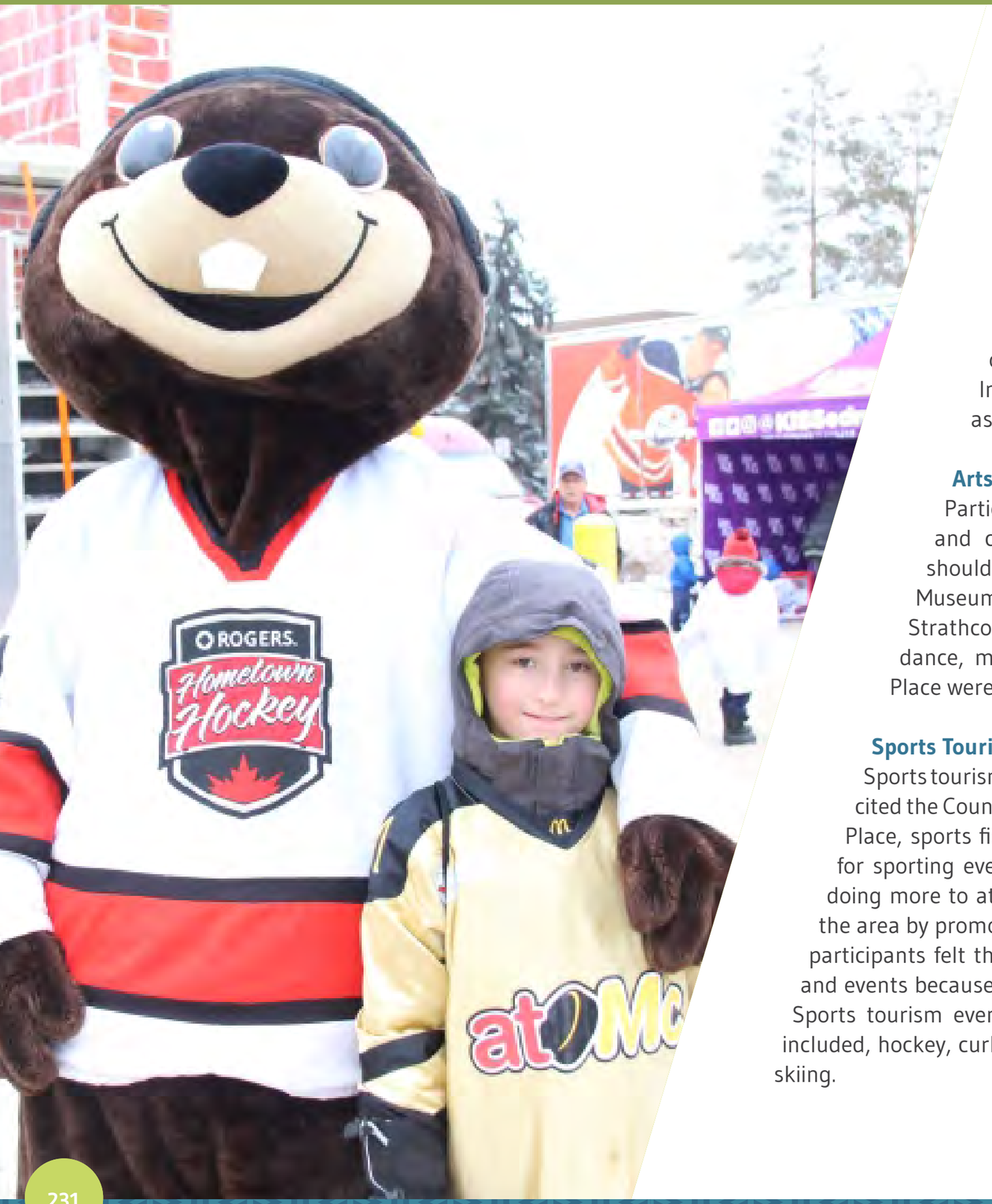
1. To inform tourism stakeholders of the project process.
2. Gain input on opportunities, challenges and priorities for tourism development in Strathcona County.
3. Gain stakeholder input on a future vision for tourism development in Strathcona County.

Both sessions were held at the Strathcona County Community Centre. Stakeholders were invited to attend by Strathcona County through a letter sent to existing stakeholder lists. 14 participants attended the morning session, and 9 participants attended the afternoon session. The following themes emerged from the sessions.



Stakeholder Input Tourism Café at the Strathcona County Community Centre on November 14th, 2019

Source: Expedition Management Consulting Ltd.



OPPORTUNITIES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

History and Storytelling

A common theme centred around the unique history of Strathcona County as a specialized municipality. Participants suggested telling the story of oil and gas in the County, along with Indigenous, agricultural and other histories as opportunities.

Arts and Culture

Participants indicated that there are many arts and culture opportunities in the County that should be leveraged. The Strathcona County Museum & Archives, Writers Foundation of Strathcona County, Gallery@501, and the many dance, music and cultural events held at Festival Place were highlighted in the discussions.

Sports Tourism

Sports tourism was another recurring theme. Participants cited the County's recreation facilities, such as Millennium Place, sports fields and the trail system, as a huge draw for sporting events. Participants felt the County could be doing more to attract tournaments and sporting events to the area by promoting and showcasing these facilities. Some participants felt there is capacity to host more tournaments and events because of the number of hotel rooms in the area. Sports tourism events specifically mentioned by participants included, hockey, curling, cycling, equestrian, and cross-country skiing.

Links to Community and Business Organizations

Participants saw opportunity in building stronger relationships with organizations such as Travel Alberta and the Sherwood Park & District Chamber of Commerce. Tying into these and other organizations could help Strathcona County tell its story, promote tourism offerings and build the brand. Go East of Edmonton, a regional tourism organization with a comprehensive website and tourism guide, was cited as a marketing tool to help raise the profile of tourism in the County.

The Community

Several participants told us that the community of Strathcona County, families and volunteers are also a huge opportunity to leverage for tourism. There are a number of Boards and Advisory Committees that the community could lend their expertise to. Participants wanted to use local resources to highlight local businesses, promote what the County has to offer and help tell its unique story.

Unique Experiences

The Beaver Hills Biosphere Reserve was mentioned numerous times for its unique tourism opportunities. Participants felt that its UNESCO designation should be more heavily promoted to raise awareness about its "global recognition of the community's commitment to conservation and sustainable development." Elk Island National Park representatives were also in attendance and they described links that could be made to their nature-based programming.

Several other unique experiences were offered as opportunities for tourism development in the County. These ideas included:

- Goat yoga
- Yurts
- Geocaching
- Scotford Hutterite Colony
- Agritourism

Additional Opportunities

A listing of other tourism development opportunities included:

- Bed & Breakfasts
- Equine and cattle industry
- Culinary experiences
- RV campgrounds with septic disposal
- Corporate retreats and team building
- Off leash dog parks

Participants also offered input on leveraging events for tourism development. They said events should align with the overall tourism strategy and plan, where appropriate. This will ensure they help further the County's vision and brand.

CHALLENGES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Marketing and Promotions

When asked about challenges for tourism development, the answer heard most frequently from participants was marketing and promoting tourism offerings and experiences. Participants want to see improved alignment in promotions, collaborative marketing and innovative methods for reaching potential visitors. One suggestion we heard was to produce a video that identifies the County's tourism assets to help "shift our mindset that we have something to promote and sell."

Package Experiences

There was an overall sentiment that packaged tourism experiences are lacking in Strathcona County. Opportunities for unique packaged experiences that could be developed included culinary tours, a winery tour, a stop at the Beaver Hills Biosphere Reserve to view the "Dark Sky" and a stay at a local hotel. Respondents felt strongly that tourism packages should be included in future promotional activities.

Communication and Capacity

Participants cited communication with Strathcona County as a challenge. Not knowing where to go for information, or how to promote their event or who they should talk to were sentiments shared by several people. Other participants expressed the need for a tourism or event coordinator position to improve communication and centralize information.

Partnerships and Collaboration

Participants told us that tourism is a fragmented industry locally and there is a need for enhanced collaboration and cooperation in order to achieve tourism goals. Along with strengthening industry partnerships, participants felt that there should be increased collaboration with the City of Edmonton. Instead of competing with Edmonton, the County could be looking to leverage opportunities and events in the city and other surrounding areas. Those representing the hotel industry also desire a strong partnership with the County and the community, so they have up to date tourism asset and event information to promote to guests.

Car Centric

A number of participants stated that Strathcona County is a car centric community. The lack of walkability and a central hub were viewed as challenges for developing tourism.

Other challenges included:

- Lack of a funding mechanism for tourism development,
- Regulations surrounding peer-to-peer online booking agencies (e.g. Airbnb),
- Absence of training and development programs for tourism,
- Lack of campgrounds and especially those with septic disposal,
- Unclear process for bidding on sport tournaments.

VISION FOR TOURISM IN STRATHCONA COUNTY

Participants shared the following inputs regarding a vision for tourism in Strathcona County.

- Have something we are known for like marquee events that bring people back every year.
- Create buzz and excitement with the events we have going on.
- Increase the number of visitors so that hotels, restaurants, retail and others all benefit.
- Articulate the County's different "feel" (i.e. how are we different from Edmonton?).

PUBLIC ENGAGEMENT STATION

A public engagement station was set up at Millennium Place on November 14, 2019 to gather input from the general public and drive participation in the surveys. This was an informal opportunity for the public to drop by the booth and have a one-on-one conversation with the consultant team and Strathcona County staff. Input was largely collected through the public survey; therefore, please see that section of the report for key findings.

STAFF INPUT SESSIONS

Two staff input sessions were hosted in Strathcona County on January 15, 2020. The sessions were led by Expedition Management Consulting and input was gathered through facilitated discussions with participants. Objectives included:

1. To inform staff members of the project process.
2. Gain input on opportunities, challenges and prioritization for tourism development in Strathcona County.
3. Gain input on a future vision for tourism development in Strathcona County.

Sessions were held at Millennium Place and the Strathcona County Community Centre. The County invited representatives from all municipal departments to attend the sessions. 14 participants attended the morning session (Recreation, Parks and Culture Department), and 12 participants attended the afternoon session (all other Strathcona County departments). The following opportunities and challenges were synthesized from the inputs received.

OPPORTUNITIES	CHALLENGES
• Building upon the County's reputation as a top-quality host city that delivers outstanding mid-sized sport tourism events. • Offering more pre/post event activities to extend stays and increase spending. • The Recreation, Parks and Culture department has other offerings that can be further leveraged to attract visitors (e.g. outdoor experiences, cultural experiences). • Telling the story of Strathcona County (i.e. history and heritage of Indigenous and settler groups). • Build unique agritourism and culinary offerings. • Improving communication and information sharing between tourism stakeholders. • Improving the promotion of tourism-related offerings. • Leverage winter season product more to encourage visitation in the off-season.	• Attracting and serving visitors is viewed as outside the mandate for many County departments. • Staff feel they are at or near capacity to deliver on events and activities in the County. • There is a need for improved role clarity. • There is a need to better understand appropriate levels of support for community-focused events vs. tourism-focused events. • Potential risks associated with overtourism (e.g. overcrowding). • Staff were uncertain whether tourism is a priority for the County. • There is a perceived lack of campground/ RV accommodations in the County.

Staff Input Session at the Strathcona County Community Centre on January 15, 2020

Source: Expedition Management Consulting Ltd.

TOURISM STAKEHOLDER INTERVIEWS

In-depth, one-on-one interviews were conducted with identified stakeholders throughout the engagement process. The purpose of the interviews was to gather detailed information from key internal and external stakeholders regarding existing tourism assets, opportunities and challenges for tourism development, future vision for tourism, partnership opportunities and other topics as appropriate. Stakeholders were invited to participate in the interviews and the response was strong. In total, 18 interviews were completed with representatives from the following groups:

Municipal Government:

- Strathcona County Administration

Local Stakeholder Groups:

- Economic Development and Tourism Advisory Committee
- Sherwood Park and District Chamber of Commerce
- Beaver Hills Biosphere
- Engaged citizens (x2)

Local Businesses:

- Barr Estate Winery
- Remai Group
- The Keg Steakhouse and Bar - Sherwood Park

External Stakeholder Groups:

- Sturgeon County
- City of Fort Saskatchewan
- Go East of Edmonton
- Edmonton Tourism
- Indigenous Tourism Alberta
- Alberta Economic Development, Trade and Tourism
- Travel Alberta
- RC Strategies + PERC
- Prairie Wild Consulting

The individual responses provided by stakeholders has been treated as confidential; therefore, a summary of the input received from all of the interviews is provided next.

OPPORTUNITIES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Sports Tourism

- Utilize the excellent facilities in the County and bring more tournaments and special events to the region
- Abundance of hotels and restaurants to accommodate more events

Natural Assets and Facilities

- Elk Island National Park
- River valley trail system
- Recreation areas
- Provincial parks

Agritourism Experiences

- There are many excellent equine operators in the County
- Agricultural producers can develop culinary offerings
- New multi-purpose agriculture facility will be built soon

Historical Experiences

- Indigenous and Metis history
- Early residents of the area
- Storytelling

Arts and Cultural Experiences

- Theatre productions
- Cultural events
- Indigenous experiences

Partner with the City of Edmonton

- Take advantage of the events happening in and around Edmonton
- Form partnerships that are mutually beneficial
- Promote the County's close proximity to Edmonton

Tourism Packages

- Create experiences and packages that are compelling and unique

Experience Clustering

- Develop clusters of similarly themed experiences in the County and the region

School Groups

- Build partnerships and experiences for school groups

Build Community Support for Tourism

- Local businesses becoming more involved in events
- Utilize the amazing local volunteer organizations

Organizing for Tourism

- Establishing an organization that will take the lead on tourism development efforts
- Aligning with the provincial tourism strategy

CHALLENGES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Limited Tourism Marketing and Promotion

- Strathcona County is not known as a tourism destination
- Need more promotion of the events, facilities and activities in the County
- The County does not have an "anchor" attraction
- Increase promotion on social media

Tourism Experiences and Packages

- There are few tourism experiences and packages in the County currently

Facility Limitations

- No conference centre in Strathcona County
- Facilities could be further utilized so that they are booked with tournaments or events more often

Limited Collaboration

- Stakeholders are siloed and not collaborating effectively
- Local Boards and Committees could be further engaged

VISION FOR TOURISM IN STRATHCONA COUNTY

The following ideas emerged when tourism interviewees were asked about their future vision for tourism in the County:

- Business community is highly engaged
- County supports tourism development
- High quality experiences are provided to visitors
- Experiences are effectively promoted
- Tourism is a vital part of the economy that brings in new money to the community
- Clear goals and strong metrics
- Vision for tourism supports the overall vision for the community

DESTINATION DEVELOPMENT SERVICES

When asked what destination development services would help their organizations develop tourism, stakeholders shared several ideas, as follows.

- Establish a single, lead organization with dedicated resources to coordinate tourism development efforts.
- Training for tourism businesses (e.g. digital marketing, experience development, package creation, etc.).
- Tourism product development supports.
- Tourism marketing for the destination as a whole that is consistent in its messaging and approach (e.g. centralized calendar of events, visitor guide, etc.).
- Forums for collaboration between local tourism-related businesses.

OPPORTUNITIES FOR PARTNERSHIP

Tourism stakeholders shared their ideas for partnerships that could help develop tourism in the County. These included:

1. Encourage local businesses and organizations to work together to develop experiences and packages (e.g. hotels, restaurants, agricultural societies, etc.).
2. Strengthen relationships between local stakeholder groups with the goal to develop tourism (e.g. County administration, Chamber of Commerce, Beaver Hills Initiatives, etc.).
3. Work with local sport organizations to bring more sport tourism events to the County.
4. Work with regional partners, such as Edmonton Tourism, City of Fort Saskatchewan, Sturgeon County and others.
5. Leverage tourism development and marketing resources from provincial level organizations (e.g. Travel Alberta, Alberta Economic Development, Trade and Tourism, Indigenous Tourism Alberta).

STRATHCONA COUNTY COUNCIL INTERVIEWS

One-on-one interviews were conducted with each member of Strathcona County Council to give them an opportunity to provide input into the tourism strategy. Council members were sent the following four questions in advance of the interviews:

1. What are the key opportunities and challenges for tourism development in the County?
2. What is your future vision for tourism for the Strathcona County community?
3. What role do you think the County should play in developing tourism?
4. What opportunities for partnerships do you see regarding developing tourism in Strathcona County?

A summary of County Council interview input is provided next.

OPPORTUNITIES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Natural Assets

- Beaver Hills Biosphere
- Elk Island National Park
- Blackfoot Provincial Recreation Area
- Northern lights
- Access to the river
- River valley

Facilities

- Strathcona Wilderness Centre
- Festival Place
- New multi-use ag facility
- Ukrainian Cultural Heritage Village

Tourism Packages

- Day trips packages and bus tours
- Packages with local hotels

Festivals and Events

- Birkebeiner Nordic ski event
- Snow Goose festival
- Highland Games
- Canada Day event
- New Years Event
- Music festivals

Strathcona County Location

- Leverage the County's proximity to Edmonton, an international airport, and major highways

Sports Tourism

- Utilize infrastructure that Strathcona County already has
- Market Strathcona County as the sports capital of Alberta
- Weekend tournaments that may attract people regionally and provincially

Agriculture

- Tap into local and regional agriculture
- Horse and cattle activities

Shopping and Retail

- Include shopping as part of the experience
- Promote "staycation" idea and entice people to spend their money closer to home
- Promote food, drinks and the brewery or liquor production idea

Marketing and Advertising

- Shift the message to "Strathcona County is the gateway" where you can stay and still go to area attractions and City attractions

Other Opportunities:

- Alberta's Industrial Heartland
- Feature Strathcona County's great locations and our artisans
- Focus on baseball, additional outdoor diamonds and an indoor facility

CHALLENGES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Council members were asked to share challenges for tourism development in Strathcona County and a number of ideas were brought forth. Although proximity to Edmonton is listed above as an opportunity, it was also identified as a challenge. The Birkebeiner Nordic ski event was an example mentioned by one Council member. The event is held in Strathcona County, but most participants stay in Edmonton. There is an opportunity to create packages for those visitors and entice them to stay, eat and play in Strathcona County.

The Beaver Hills Biosphere Reserve was mentioned several times as a missed tourism development opportunity for the County, but also one that comes with challenges. Marketing of the site as a multi-day destination was listed as a challenge due to competition with Elk Island National Park and other natural areas.

Council members also noted marketing and messaging as challenges. Defining the County's "brand" and drawing visitors in has also been a challenge. We heard that the existing infrastructure could be leveraged to a greater degree in order to capitalize on tourism opportunities.

A number of other challenges were identified including:

- Underdeveloped tourism opportunities
- Lack of a Destination Marketing Organization led by the business community with involvement of the hotel and hospitality industry
- Budget and resources required for the program
- Lack of a tourism asset inventory
- Downturn in the economy
- Lack of indoor facilities
- Better river access
- Working in silos

VISION FOR TOURISM IN STRATHCONA COUNTY

The following ideas emerged when Council members were asked about their future vision for tourism in the County:

- Market Strathcona County as Alberta's sports capital
- Family focused community
- Gateway to the parks
- Promote the natural assets that are here and highlight Beaver Hills Biosphere Reserve and ecotourism
- Focus on economic development and the growing industrial heartland
- Creating opportunities for people to come to our region to shop, play and eat
- Strathcona County is "open" for business
- Known as a premiere day trip destination

WHAT ROLE SHOULD THE COUNTY PLAY IN DEVELOPING TOURISM?

Council shared varying ideas about the role the County should play in developing tourism. Some Council members felt the County should take an active, lead role. Another perspective suggested the County take the lead for the short term, and then transition that lead role to a community or volunteer group.

The County could also help to manage risks and ensure the right departments are at the table to provide needed support. The County can bring important information about changing bylaws and provincial bylaws to the table.

Additional ideas about the County's role included:

- Selling the success stories
- Being the biggest cheerleaders
- Ensuring funds and budget to bring initiatives to life
- Providing seed money
- Providing land
- Partnering externally with private entities
- Hiring a tourism specialist
- Being aware of trends, what our capabilities are and getting industry involved

OPPORTUNITIES FOR PARTNERSHIP

Council shared four key partnerships that could help develop tourism in the County. These included:

1. Working with other municipalities in the region.
2. Partnering with organizations such as the River Valley Alliance, Travel Alberta, Alberta Economic Development, Trade and Tourism, the Federation of Canadian Municipalities, and sports organizations.
3. Collaborating with destinations such as the Beaver Hills Biosphere Reserve.
4. Partnering with local businesses, hotels, restaurants and non-profit organizations to create compelling and unique packages.

3 NEXT STEPS

This document summarizes the Phase 2 public engagement activities included as part of the Strathcona County Tourism Strategy and Implementation Plan. The research contained within this report will be used to support Phase 3 - Destination Analysis and Opportunity Assessment.

The community will have an opportunity to provide feedback on the draft tourism strategy during Phase 4 of the project. County Council will receive a presentation on the draft tourism strategy following this next round of engagement, and the final tourism strategy will incorporate this feedback.

4 APPENDICES

APPENDIX E: TOURISM READINESS ASSESSMENT

LEGEND:

- Indicator supports the tourism readiness of the community.
- Indicator neither supports nor detracts from the tourism readiness of the community.
- Indicator detracts from the tourism readiness of the community.

INDICATOR	KEY FINDING(S)	TOURISM READINESS
SWOT ANALYSIS	• Strathcona County has key strengths from which to build on, including strong existing assets, a strategic location, and a safe, welcoming community that combines urban amenities with a distinct rural atmosphere. • There are significant opportunities to sustainably grow tourism, while simultaneously supporting the County's other economic sectors. • There are currently barriers to tourism growth, such as an underdeveloped tourism support system, unclear tourism brand, and a lack of market-ready tourism products. However, these barriers can be overcome with concerted effort and investment.	✓
STEEP ANALYSIS	• Tourism is a resilient growth industry and can play a significant role in diversifying Strathcona County's economy. • There is strong support from provincial and federal governments to grow tourism.	✓
STRATEGIC ALIGNMENT ANALYSIS	• Growing tourism in Strathcona County was found to be in alignment with the goal of the County's Strategic Plan to cultivate economic diversification.	✓
TOURISM SERVICE DELIVERY ANALYSIS	• Strathcona County's tourism service delivery system is underdeveloped. There are limited tourism support services, which has resulted in limited tourism development.	✗
TOURISM ASSET INVENTORY	• Several important strengths were identified in relation to Strathcona County's tourism assets, including natural attractions, agritourism assets, community and sport facilities, the capacity to host sports events, cultural attractions and events, and accommodations. • However, many of these assets are underdeveloped and some will need to be enhanced to provide more experiences to visitors.	⏸
COMMUNITY ENGAGEMENT RESULTS	• There was strong support among many stakeholder groups to develop tourism in Strathcona County, including local businesses, community organizations, festivals and events, and government representatives. • Although the response to the public survey was lower than expected, there was support for tourism development among respondents.	✓
MARKET ANALYSIS	• There are strong existing visitor markets that are actively seeking experiences Strathcona County can offer.	✓
COMPETITIVE ANALYSIS	• Strathcona County faces stiff competition from established destinations that compete for similar visitor markets. Significant investment and effort will be needed to win market share among some traveller segments. • Strathcona County has differentiated itself in the area of nature-based tourism with assets such as the Beaver Hills Biosphere Reserve, Elk Island National Park, Strathcona Wilderness Centre, Cooking Lake – Blackfoot Provincial Recreation Area, and the North Saskatchewan River. • The County is also known for offering high quality sporting events.	⏸

APPENDIX F: FUNDING OPPORTUNITIES FOR TOURISM DEVELOPMENT

Successful tourism development will require time, energy and resources to accomplish. Therefore, a resourcing structure is needed to ensure initiatives move forward and momentum is maintained. The following outlines some of the funding opportunities available to support tourism development.

MUNICIPAL FUNDING

In Alberta, municipalities invest in local and regional tourism organizations in a variety of ways. Examples of municipal funding support include resources for staff, service contracts and special project funding. Municipalities can also support tourism through the development of infrastructure that enhances visitor experiences, in addition to dedicating staff resources towards appropriate tourism-related initiatives.

INCREASE IN BUSINESS ACTIVITY AND TAX BASE

One of the objectives of the strategy is to develop tourism initiatives that will result in increased economic activity that will result from spending by tourists who come from outside the community. If businesses and governments see a return on investment, it is expected that further investment will be warranted from a range of stakeholders.

FEE FOR SERVICE

Fee for service is a "pay to play" option for tourism organizations to meet specific industry needs and generate revenue. Charging a fee for a website listing or for trade show representation are both examples of fee-for-service offerings. Providing a-la-carte products and services (vs. an all-inclusive membership fee) provides more choice for potential participants and allows them to invest in customized services. Conversely, this approach has the potential to significantly increase the number of sales transactions per year; therefore, this risk must be managed through the development of efficient administrative processes.

DESTINATION MANAGEMENT FUND

Destination Management Funds (DMF) are a proven method to provide core funds for tourism development and marketing. DMF's involve voluntary participation by operators who agree to charge an extra fee on their services (usually 2-3%). This extra charge is then contributed to the DMF for collective marketing and destination development purposes. In order for a DMF to achieve a sustainable scale it must reach a critical mass of participants. DMF's can be challenging to develop and maintain, but there are many examples of successful organizations that utilize DMFs in Alberta.

DMF Revenue Analysis for Strathcona County

In Strathcona County there are approximately 1,375 fixed roof accommodation rooms. According to the Alberta Hotel and Lodging Association (AHLA), average daily rates (ADR) were $113.27/per night and occupancy rates (OR) were 38.4% on a year-to-date basis in Sherwood Park in 2019.[49] Assuming a 50% participation rate in the program and a 3% contribution rate, it is estimated that there is a potential annual revenue source of $327,441 for a DMF (see Figure 7).

It should be noted that the stated ADR's and OR's in Strathcona County are considerably lower than historical averages. It is the expectation that as tourism development occurs and overnight visitation increases, these figures will rise, causing the DMF to increase proportionately.

Figure 7. DMF Revenue Breakdown (assuming 50% participation)

# Rooms	Occupancy Rate	# days	ADR	Room Revenue/yr.	Participation Rate	DMF %	Total for DMF/yr.
1,375	0.384	365	$113.27	$21,829,394	0.5	0.03	$327,441

Opportunities in Implementing the DMF

A DMF could provide much need core funds that could be leveraged with contributions from partners. It is recommended that tourism product development is also considered as an acceptable expenditure of funds (in addition to promotions). A DMF can help create engagement from the business community as they will have "skin in the game." This could in turn result in increased communication and partnerships (e.g. packaging of tourism experiences).

Challenges in Implementing the DMF

The primary challenge is the task of selling the benefit of collaboration to business owners. Businesses will not want to participate in the DMF unless there is a reasonable expectation of a return on their investment. There will need to be a strong business case that supports investment.

MEMBERSHIP FEES

Membership fees are a traditional revenue stream, providing revenue on an annual basis. These fees can be structured as a flat rate for all members, or in a scaled fashion whereby smaller organization pay less. In return, members receive a package of services. Many tourism organizations in Alberta and across the globe utilize membership fees for a portion of their budgets.

STAKEHOLDER CONTRIBUTIONS

This document identifies several stakeholder groups that could be contributors to the strategy as it moves forward into the implementation stage. These organizations may choose to fund various initiatives based on the mandate of their organization. It is expected that some organizations will participate to a greater degree (financially) than others. It should be noted that gifts in kind and other forms of collaborative support are also valuable contributions during implementation. It will be critical to have all stakeholders participate in the development of key initiatives in the strategy regardless of their financial contribution.

CORPORATE PARTNERSHIPS

International research indicates that tourism organizations look to sponsorships and partnerships as key to building revenue. Building new partnerships is about creating value by connecting destination and partner brands, customers and networks. Once the strategy begins to take shape it will be important to identify companies and organizations that identify with, or have branded themselves along similar lines to, the region's tourism offering.

PROVINCIAL FUNDING

The Government of Alberta invests funds in provincial, regional and local tourism initiatives through various programs as described in Figure 8.

Figure 8. Provincial Funding Programs

ORGANIZATION	PROGRAM	AVAILABLE FUNDING
Alberta Economic Development, Trade and Tourism	Community and Regional Economic Support (CARES)	$10,000 minimum
Alberta Economic Development, Trade and Tourism	Major Cultural and Sport Events	$250,000 maximum
Alberta Economic Development, Trade and Tourism	Visitor Friendly Alberta	Approximately $20,000 (depending on project)
Alberta Economic Development, Trade and Tourism	Community Facility Enhancement Program	$125,000/year (small) $1,000,000/year (large)
Alberta Economic Development, Trade and Tourism	Heritage Awareness Grants	$15,000
Alberta Economic Development, Trade and Tourism	Historic Resource Conservation Grants	Grants range from $5,000 - $100,000
Alberta Economic Development, Trade and Tourism	Tourism Entrepreneurship Startup Seminar	Seminars are free to attend
Travel Alberta	Tourism Training Programs	100% of approved training costs

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