

INVEST IN ALBERTA'S TOURISM INDUSTRY

Southwest Alberta





INTRODUCTION

Alberta's Tourism Framework supports and focuses the tourism industry to create compelling, authentic tourism experiences that will grow Alberta as a leading tourism destination. It actively encourages entrepreneurial investment in traveller-focused development of innovative tourism experiences, destination renewal, and new destination areas through new collaborative partnerships with regions, communities and industry stakeholders. This approach will create and enhance traveller-focused experiences around the province by identifying and prioritizing areas holding high tourism value.

Alberta Tourism, Parks and Recreation (TPR), in partnership with the Alberta SouthWest Regional Alliance, completed a tourism investment opportunity assessment for the southwest Alberta region. This collaborative initiative supports Alberta's Tourism Framework, and reflects the Government of Alberta's role in facilitating access to capital for the tourism industry.

The assessment is considered high-level in nature, and was not deemed to be a feasibility study. It contains high-level business case assessments around the identified opportunities, and is aimed towards attracting private sector developers and investors. This publication provides a summary of the opportunities identified in the report. All dollar amounts are expressed in Canadian dollars unless otherwise stated.


SOUTHWEST ALBERTA

Alberta SouthWest Regional Alliance is a partnership of 15 communities working together through initiatives to facilitate sustainable economic growth and increase prosperity for all member communities in southwest Alberta.

In 2011, the region had a combined population of 36,749, or 1% of Alberta's total population. The largest communities are Crowsnest Pass and the Municipal District of Willow Creek, representing 30% of the total population of southwest Alberta. The region includes a land area of 15,466 km² and accounts for 2.4% of Alberta's land mass. It has significant geographic diversity—from prairie grasslands and foothills, to mountain peaks and river valleys, and the majestic Canadian Rockies that stretch along the southwestern border of Alberta.

Southwest Alberta forms the northeast corner of the “Crown of the Continent”, which is a larger transboundary region comprised of the Waterton-Glacier International Peace Park, and the surrounding areas of British Columbia and Montana. In 2007, National Geographic identified the Crown of the Continent as a significant, unique and authentic geotourism destination. The region has since partnered with National Geographic to develop a geotourism mapguide and the Crown of the Continent website.





As one of Alberta's major agricultural areas, this sector is the region's largest employer followed by health care, government services and retail. The fastest growing industries in recent years have been the utilities and real estate sectors, followed by accommodation and food services. While oil and gas production are leading sectors in many other parts of Alberta, both sectors in southwest Alberta represent only a fraction of the province's total production.

Quality of life is typical of rural communities with a full range of recreation, health, education, and cultural amenities. Although the region is distinguished by the great open spaces, significant tourism demand is also generated by heritage, arts and culture.

Tourism is fast becoming an economic mainstay in the region, particularly in Cardston County, Crowsnest Pass, Fort Macleod, and Waterton Lakes. Tourism in southwest Alberta is directly related to the abundant natural landscapes, historic landmarks and variety of cultural influences in the region.

In addition to two UNESCO World Heritage Sites (Waterton-Glacier International Peace Park and Head-Smashed-In Buffalo Jump), the region offers multiple provincial parks, numerous campgrounds, cowboy and western themed products and several recreation areas including ski hills and hiking trails. Southwest Alberta is highly dependent on the domestic travel market but also draws visitors from the rest of Canada, the U.S. and from overseas.

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ALBERTA



BRITISH COLUMBIA

WATERTON LAKES NATIONAL PARK

USA



CROWSNEST PASS

Cabin/Resort Development

Eckardt's Tecumseh Mountain Resort is seeking a joint venture partner to expand into a premier resort. Known as "The Cabins at Crowsnest Pass", the expansion will feature a 40-unit, luxury chalet style resort to be built and sold in four phases. The initial phase is to build two cabins (one duplex and one single unit) immediately and the next four units (two duplexes and two single units) will be built when sold. These initial six units will form the first phase of the expansion, and there are three more phases envisioned which will include 26 units (40 doors total). The vision is that the resort will one day operate 100 doors. Multiple management companies have expressed interest in operating the resort village once it reaches this size.

Site

The development opportunity is located on the existing 40-acre site of Eckardt's Tecumseh Mountain Resort, in the scenic valley community of Crowsnest Pass. Situated approximately five kilometres west of Coleman and about two kilometres north of Tecumseh Road, it is nestled between the peaks of Tecumseh Mountain, the Flathead Range and Crowsnest Mountain and in close proximity to Alison Chinook Cross Country Ski Trails.

Open since 1994, Eckardt's Tecumseh Mountain Resort is rated at 3.5 stars by the Alberta Hotel & Lodging Association. The property includes a main residence for the owner/manager, three duplex guest cabins, and three one-bedroom cabins for a maximum capacity of 16 persons and 11 Recreational Vehicle (RV) campsites. The main residence also provides a restaurant and lounge for guests.



Market Attraction

Developed in response to consumer demand for additional recreational, multi-use cabin development, “The Cabins at Crowsnest Pass” will offer guests direct access to 85 kilometres of snowmobile/ATV trail network; 900 kilometres of fishable streams within a 60 kilometre radius; two ski hills (Castle Mountain and the regional Pass Powderkeg Ski Hill) and several world-class golf courses within a 30 minute driving distance. Feedback garnered through Rendez-Vous Canada, Canada’s premier international tourism marketplace, and ITB Berlin, the world’s largest travel industry event, have confirmed that its European partners would be willing and able to market the expanded resort.

Recreational real estate continues to be an increasingly popular investment choice for baby boomers with both the financial means and the time to start enjoying recreational pursuits. Also entering the market are younger couples who can increasingly afford to pursue recreational activities, largely because of Alberta’s strong economy and its residents’ higher earning power.

Luxury chalet style cabins could also attract the regional *Free Spirits*¹ market segment. The location’s access to multi-season, outdoor recreational activities, wildlife viewing and heritage experiences would hold great appeal to this market.

Financial Information

The current owners are seeking an investment of up to \$2.5 million to launch the development of Phase I (six cabins, nine units) of the project and assistance with marketing the resort-based real estate opportunity. To date, considerable time and money has been invested in market research, permits and plans for the proposed expansion.



Initial starting prices for the units have been estimated at \$760,000 per duplex cabin (\$380,000 per unit) and \$437,000 per single cabin, with an option to purchase as one third fractional units.

Assuming a three to five year development plan and an annual inflation rate of 2%, the total project cost for “The Cabins at Crowsnest Pass” is estimated at nearly \$9.1 million (includes both development and selling costs).

¹ *Free Spirits* are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they also seek high-end experiences that are shared with others. The *Free Spirits* market segment is one of 12 Explorer Quotient™ (EQ) types. EQ types also include *Cultural Explorers* and *Authentic Experiencers*. EQ is a market segmentation system based on the science of psychographics. It builds a link between travellers’ social values and their travel behaviours and preferences. The EQ tool can be very effective in defining the best customers, those who are or will be attracted to the kind of experiences being offered.

THE CABINS AT CROWSNEST PASS

Phase 1 Estimated Capital Requirements
6 cabins/9 units

\$1.6 M

Estimated Capital Requirements
26 cabins/40 units

\$9.1 M

Residential Sales

\$20.1 M

Selling Expenses
(Marketing and sales)

\$1.9 M

Development Costs
(Inclusive of capital costs and infrastructure)

\$7.2 M

Net Cashflow

\$11.0 M

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

CARDSTON COUNTY

The Great Canadian Barn Dance Lodge Development

The Great Canadian Barn Dance (GCBD) is seeking parties interested in purchasing and expanding current operations to include a 30-room lodge. The GCBD is a family-owned and operated full service RV resort featuring live western entertainment, dancing, and recreational activities in Hill Spring, Alberta, approximately 60 kilometres northwest of Waterton Lakes National Park. On a seasonal basis, the proposed lodge would provide additional rooms to attract demand from domestic and international tourists desiring an authentic western experience.

Site

The GCBD is located between Hill Spring and Glenwood, on Wynder Road, two kilometres north of its intersection with Secondary Highway 505. The 62-acre site, of which 13 acres are undeveloped, would be used for the proposed lodge development. Included on the site is a 12-acre artificial lake, also owned by the GCBD operation, with canoes and rowboats available for guests.

The GCBD first opened in the late 1980s hosting traditional western barn dances and dinners. It later grew into an on-site RV resort to accommodate overnight visitors in campers and trailers. Current facilities include 75 serviced RV campsites, 13 unserviced RV campsites, a pavilion for social events, six bedroom bed and breakfast lodge, six bedroom bunkhouse, a 138 seat-barn and professional dance floor and stage, and a 700 square foot office space. The site also provides a variety of recreational facilities including a nine hole frisbee disc golf course, basketball, volleyball, badminton, horseshoe pits, two playgrounds, fishing and canoeing. Additional facilities include a workshop, laundromat, washrooms, showers and owner's residence.

The facility operates from mid-May to the end of September. On average, the GCBD hosts approximately 100 events per year.



Market Attraction

Visitors to the GCBD consist primarily of families and seniors, the majority of which are Albertans (60%-70%), with a further 10% from other western Canadian provinces. The balance of visitors come from the rest of Canada, the U.S. and overseas. The resort is popular for family reunions, tour groups and RV caravans. RV companies such as Winnebago, Airstream and Good Sam use the GCBD as one of their preferred camping destinations for groups travelling via caravan. Tour companies like Brewster also include the resort in their itinerary and would likely support the development of the 30-room lodge to accommodate tour groups.

The proposed lodge would attract demand from these potential target markets:

- *Cultural Explorers*², who have a propensity for travel that includes opportunities for cultural immersion;
- Domestic and international motorcoach tour groups which currently cannot be accommodated overnight on the site;
- Summer season, independent leisure travellers primarily from Alberta, other western Canadian provinces, the U.S. and international tourists;
- Groups wishing to organize family reunions; and
- Unsatisfied demand which cannot be accommodated during the peak season months within nearby Waterton Lakes National Park.

² *Cultural Explorers* are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Financial Information

The current owners, who have been operating the facility for 25 years, are interested in selling the GCBD operation to an investor for \$1.5 million to \$1.75 million, with an opportunity to expand operations to include a 30-room lodge. The current owners would also consider the option of leasing back the barn dance portion of the operation for five to ten years to provide the live entertainment and dances, and operate the food and beverage service. This presents potential branding opportunities to the new investors while providing them with access to the barn dance's current clientele.

The capital costs for the lodge development are estimated at \$2 million, inclusive of base building construction costs, furniture, fixtures and equipment, soft costs, and infrastructure costs (excluding land).



THE GREAT CANADIAN BARN DANCE LODGE DEVELOPMENT

Purchase of Existing Business

\$1.5 - 1.7 M

Estimated Capital Requirements Proposed 30-room lodge

\$2 M

PROJECTED OPERATING RESULTS SUMMARY for 30-room GCBD Lodge (Years 1 to 5)

Seasonal Occupancy

50 - 53%

Average Daily Room Rate

\$155 - 171

Total Revenues

\$455 - 533 K

Net Operating Income (30 - 32% of total revenues)

\$138 - 173 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

CARDSTON

RV Campground Expansion

The town of Cardston is looking for private sector investment to expand its existing Lee Creek Campground to meet the growing demand from RV travellers. The campground currently offers 33 fully serviced RV sites, 10 partially serviced RV sites, 10 tent sites, and eight large-unit pull through full serviced sites (61 sites total). The expansion would see capacity grow by an additional 20 campsites to accommodate larger RVs. There is added potential to build a second reunion centre that would offer the local community and campground guests a new venue for social gatherings, which has also been in high demand.

The campground's central location is within walking distance to local shopping and attractions, such as Cobblestone Manor and the Remington Carriage Museum. Known for its rich Mormon history and Aboriginal culture, Cardston also enjoys proximity to Waterton Lakes and is a stop on the Mormon Trail. Recreation amenities in the area include an agridome, an outdoor swimming pool, an ice centre, the Lee Creek Valley Golf Course, several ball diamonds, tennis courts and a skateboard park.



Site

The Lee Creek Campground is owned by the town of Cardston and managed by a third party operator. The site is located on a quiet, mostly residential street, approximately 400 metres to the west of Main Street. Cardston is situated in the low foothills of southern Alberta, approximately 40 kilometres east of the Waterton Lakes National Park, 77 kilometres south of Lethbridge, Alberta, and 25 kilometres north of Montana.

The Lee Creek Campground is situated at the water's edge. In addition to operating 61 sites, it houses a large reunion centre that offers guests a stage, washrooms, showers, a kitchen, an outdoor playground, horseshoe pits and adjacent campsites. The campground also offers some retail sales through its office, laundry facilities, washrooms, shower facilities and wireless internet. Each campsite has a picnic table and a fire pit.

Market Attraction

The market for campgrounds in Alberta is primarily comprised of local Albertans but also includes visitors from other Canadian provinces, from nearby U.S. states and overseas. The supply of accommodations in the Waterton Lakes National Park is insufficient to accommodate the high level of demand during the summer months. As such, there is a greater demand for RV parks and campgrounds as an alternative to typical lodging facilities. The Cardston area captures some of this demand due to its proximity to Waterton Lakes National Park.

The proposed expansion would enhance the campground's appeal to Canadian and U.S. *Cultural Explorers*. The site is located on one of the favoured routes to Alaska and could continue to be a favoured stop for U.S. *Cultural Explorers* travelling in RVs or wishing to tent camp. The campground's central location relative to popular attractions could also increase its appeal as a base camp for day trips. The typical operating season for campgrounds in Alberta is May through September.

Financial Information

The capital costs for 20 additional sites at Lee Creek Campground have been estimated at \$500,000, inclusive of base building construction costs, furniture, fixtures and equipment, soft costs, and infrastructure costs (excluding land).



EXPANDED LEE CREEK CAMPGROUND

Estimated Capital Requirements
Proposed 20 RV site expansion

\$500 K

PROJECTED OPERATING RESULTS SUMMARY for Expanded 81 Site Lee Creek Campground (Years 1 to 5)

Seasonal Occupancy

56 - 60%

**Average Daily
RV Rate**

\$33 - 36

Total Revenues

\$186 - 218 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

BELLY RIVER

Teepee and RV Campground Development

An investment opportunity has been identified for teepee camping on land close to Mountain View, Alberta, situated midway between Cardston and Waterton Lakes National Park. The proponent for this opportunity is the owner of 72 acres of land. A portion of this land, along the Belly River, has been identified as a potential site for a teepee campground. Another portion of this acreage could be the future site for RV camping and cabin accommodations. Each camping area would feature a central building for washrooms, showers and cooking facilities. The project proponent is interested in managing the campground and is seeking a private sector equity partner(s) for the development of the site.

Site

The site lies between Highway 800 and the Belly River. It is situated 12 kilometres north of the U.S. border, four kilometres north of Highway 5 and only a few minutes south of the Blood Tribe Reserve. Currently, there is only one teepee camping site near this area.

Market Attraction

Teepee camping is part of a growing trend called “Glamping” or glamour camping, one of the latest green travel trends that takes the “roughing it” out of camping. Glamping can include camping pods, gypsy caravans, bell tents, lodges, shepherd’s huts, teepees, yurts and wigwams and even fully fitted safari tents - many of which are secure and heated. It appeals to vacation seekers who seek adventure but want the comforts of home; it’s a vacation close to the outdoors but with a few ounces of luxury. Both Dinosaur Provincial Park and Writing-on-Stone Provincial Park in Alberta have initiated walk-in “comfort” tents within their campgrounds that include such amenities as a double bed with mosquito netting, a dining table and chairs, small refrigerators and propane barbeques.



Teepees are conical tents, and historically were easily moved and yet substantial structures used by Plains Aboriginal people in North America. These wall tents were used extensively throughout the Canadian West by early trappers, loggers, gold miners, explorers and settlers. They are often made of treated canvas that is both flame and mildew resistant and provide a barrier to keep away cold drafts. Sizes can range from eight to 28 feet in diameter, accommodating small and large groups alike. Teepees can feature the comforts associated with glamping or they can be more basic and rustic.

Teepee camping could appeal to both Canadian and U.S. *Cultural Explorers* with interests in learning about and experiencing Alberta's Aboriginal culture. Other activities like painting and photography could also appeal to potential overnight visitors.

This type of camping would also attract the following markets:

- Summer season, independent leisure travellers primarily from Alberta, other western Canadian provinces, the U.S. and overseas tourists who are looking for a 'close to nature' experience;
- Visitors who enjoy camping but who are unable or unwilling to bring and setup camping gear;
- Small corporate groups and retreats looking for a unique cultural experience; and
- Unsatisfied demand which cannot be accommodated during the peak season months within nearby Waterton Lakes National Park.



Financial Information

Capital costs for five RV and five teepee sites at Belly River have been estimated at \$300,000, inclusive of base building construction costs, furniture, fixtures and equipment, soft costs, and infrastructure costs (excluding land).

TEEPEE AND RV CAMPGROUND, BELLY RIVER

Estimated Capital Requirements

Proposed 5 RV and 5 teepee campsites

\$300 K

PROJECTED OPERATING RESULTS SUMMARY for Proposed RV & Teepee Campground (Years 1 to 5)

Seasonal Occupancy	Average Daily Rate	Total Revenues	Net Operating Income (55% of total revenues)
70 - 72%	\$60 - 66	\$64 - 73 K	\$35 - 40 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

SENTINEL

RV Resort Development

The project proponent for the Crowsnest River RV Resort in Sentinel is seeking investment for the development/operation of the resort.

The proposed development would feature 210 RV and park model sites, located along Allison Creek and Crowsnest River, west of Coleman, Alberta.

The development could take place in two phases with the first phase to include construction of the first 155 sites and the second phase to include the remaining 55 sites. Preliminary development plans for the 40-acre site would include 210 RV sites ranging from 50 to 90 feet. In addition, park model sites would be built to contain mobile cabins, an office, a 5,000 square foot clubhouse, a swimming pool, a retail store, manager's living quarters, bathhouses with laundry facilities, sports and recreation areas, a playground and a dog run. It is envisioned that the RV lots will be sold for individual title ownership. While most sites are intended to be used seasonally or year round by owners, the option to rent the lots for overnight use would also be available.

Site

The proposed development site is located south of Highway 3 (Crowsnest Highway) with the Crowsnest River at its southern boundary, as well as the Allison Creek running through the site. The site is located approximately seven kilometres from the western edge of the community of Coleman and is within relative proximity to three major cities including Calgary, Lethbridge and Medicine Hat.

Market Attraction

RV resorts are typically located in areas that offer RV enthusiasts easy access to multiple experiences such as access to provincial parks or attractions, fishing areas, hiking trails, dining options, a place to launch a boat or unique heritage and native sites. These resorts offer weekly, monthly and seasonal rentals featuring full service RV pads, with several amenities such as internet, cable or satellite TV, sewage hook up and traditionally between 30 or 50 amp service. RV resorts frequently offer onsite facilities such as heated pools, hot tubs, clubhouses, shops, restaurants or snack bars, playing fields, playgrounds, biking or nature trails, water sports, volleyball, bocce ball and other recreational activities.



According to the 2009 report (commissioned by TPR), *Recreational Vehicle Camping in Alberta: A Demand and Supply Side Perspective*, there are more than 600 campgrounds and more than 40,000 campsites in Alberta. RV resorts represent a new development opportunity for the RV campground sector in Alberta.

A campground in this area could attract *Cultural Explorers* and *Free Spirits* who are travelling to and from Alberta, British Columbia and Saskatchewan or planning for overnight stays in Crowsnest Pass. Tent camping and RV touring appeal to both types who are likely to choose these accommodation options while travelling. The location of the campgrounds within the activity-rich Crowsnest Pass area and proximity to heritage attractions would also appeal to these types.

This site would also attract the following potential markets:

- Summer season, independent leisure travellers primarily from Alberta and British Columbia, as well as a smaller percentage of travellers from international markets seeking soft adventure; and
- Winter/outdoor recreation enthusiasts primarily from Alberta and British Columbia wanting to take advantage of recreation activities in Crowsnest Pass and the surrounding region.

Financial Information

The capital costs for this development have been estimated at \$3.6 million, inclusive of hard construction costs, furniture, fixtures and equipment, and soft costs. This estimate is based on the development of 210 sites (offering up to 100 amp power), an office, a clubhouse, bathhouses and recreation areas. The project proponent indicates that if development takes place in two phases, Phase I would include construction of sites and services/



amenities on the east side of the property featuring approximately 155 sites. Phase II of the development would consist of the remaining 55 sites and services/amenities on the west side of the creek.

The operation of the RV resort is expected to include the establishment of a “condo board” which would be responsible for the upkeep and maintenance of the resort, among other duties. Lot owners would be required to pay maintenance or “condo” fees, which have not been established at this time, but are often in the range of \$100-\$150 per month. While it is expected that many lots will be owner/occupied, additional park revenues will be generated through the nightly rental of some sites when owners opt not to use their site. To date, considerable time and money have been invested relative to market research, permits and plans for the proposed development.

CROWSNEST RIVER RV RESORT, SENTINEL

Total Estimated Capital Requirements

210 RV sites, office, clubhouse, recreation areas
(Excluding initial land acquisition costs)

\$3.6 M

Residential Sales	Selling Expenses	Development Costs	Net Cashflow (Before land)
\$15 M	\$1 M	\$4 M	\$10 M

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

WATERTON LAKES

Resort Development

An opportunity exists to develop an upscale 40-room Eco Lodge Resort just outside the gates of the iconic Waterton Lakes National Park, the anchor for tourism to southwest Alberta. The Eco-Lodge would be open on a year-round basis and cater to visitors to Waterton Lakes National Park, which is the Canadian extension of the Waterton-Glacier International Peace Park and considered a sister park to Montana's Glacier National Park. The International Peace Park is recognized by UNESCO as a World Heritage Site.

The project proponents have purchased an 80-acre site, of which 40 acres will be used for the proposed Eco Lodge Resort, and are seeking private sector equity partner(s) for the initial development phase of the lodge.

Site

According to *Frommers Travel Guide*, Waterton Lakes National Park is “the most stunning of the Rocky Mountain Parks,” where the prairie and Rocky Mountains meet in an unusual combination of landscapes and 45 different habitats unique in Canadian national parks. The park provides a relatively untouched area to explore for many Alberta residents and visitors seeking a more varied recreational experience.

The proposed Eco Lodge Resort will be located on a 40-acre parcel of pristine aspen parkland located three kilometres south of Highway 5, east of the Waterton Lakes National Park boundary, in the County of Cardston, Alberta.

The site is located approximately 1.5 kilometres from the Waterton Lakes National Park gate entrance. The park covers 505 square kilometres and is surrounded by a further 100 square kilometre radius (32,000 acres) of Nature Conservancy Lands (NCC) referred to as the Waterton Park Front Project. Due to the vision of the NCC and its partners and the long-term commitment of area ranchers, the lands surrounding the Waterton Lakes National Park have been protected as conservation lands.

The site presents a unique tourism opportunity as it is exempt from the land use restrictions imposed by the adjacent, federally protected Waterton Lakes National Park. It is also the only available parcel of land for potential commercial use remaining within the Waterton Park Front Project that maintains both lake and mountain views into Waterton Lakes National Park.



Market Attraction

The Eco Lodge Resort would compete primarily with accommodation properties in Waterton Lakes National Park. There are eight commercial accommodation properties offering 362 rooms within the park, the majority of which operate on a seasonal basis, with only two properties operating on a year round basis. On an annualized basis, the competitive market is comprised of 196 rooms. The iconic Prince of Wales Hotel, with 86 rooms has the shortest operating season of 100 days from mid-June to mid-September, and is one of four hotels owned by American-based Glacier Park Inc.

For the past four years, visitation to Waterton Lakes National Park has averaged between 382,000 to 402,000 visitors, of which approximately 88% visit during the peak April through September period.

Accommodation properties within the park are operating at close to capacity limits during the peak months of July and August, and once the 24-room Kilmorey Lodge is re-built and re-opened by 2016, no further opportunities will be available for additional room accommodations within the park.

A resort in this location would appeal to *Cultural Explorers* given its proximity to a number of culturally rich attractions and many outdoor and wildlife-viewing experiences. *Cultural Explorers* from the U.S. in particular, would enjoy the lodge's upscale amenities and restaurant services (e.g. foods using locally sourced ingredients).

Free Spirits would enjoy the experience of luxury accommodations against the backdrop of nature and the many recreational opportunities that the area offers. In winter, the Eco Lodge Resort would provide a suitable staging ground for exploring a multitude of winter ski activities, from cross-country skiing in the park, to downhill

skiing at Castle Mountain or Pass Powderkeg Ski Hill in Crowsnest Pass.

The proposed 40-room lodge would provide additional year-round rooms in the local market to attract demand from these additional target markets:

- Independent leisure travellers during the summer season, primarily from Alberta, other western Canadian provinces, the U.S. and overseas tourists;
- Unsatisfied demand from travellers during the peak season months within Waterton Lakes National Park and/or are seeking a higher-end experience with more up-to-date facilities and amenities;
- Winter/outdoor recreation enthusiasts primarily from Alberta and British Columbia wanting to take advantage of recreation activities in the park and the surrounding region;
- Domestic and international tour groups to southwestern Alberta and those visiting both the Waterton Lakes and Glacier National Parks; and
- Small meeting and conference groups with delegates largely from Calgary and other Canadian markets.

Financial Information

Capital costs are estimated at \$10 million for the proposed 30,000 square foot lodge, inclusive of base building construction costs, furniture, fixtures and equipment, soft costs, and infrastructure costs and land. The preliminary 30,000 square foot facility would include 40 guestrooms, 2,250 square feet of meeting/function space, a 75-seat restaurant and 33-seat lounge, a spa with four treatment rooms, a fitness centre, indoor pool and a business/outdoor recreation centre to co-ordinate adventure-themed recreation activities for guests and provide access to business services.

ECO LODGE RESORT, WATERTON LAKES

Estimated Capital Requirements

Proposed 40-room lodge, 75-seat restaurant, fitness centre, indoor pool

\$10 M

PROJECTED OPERATING RESULTS SUMMARY for Proposed 40-room Eco Lodge (Years 1 to 5)

Annual Occupancy

42 - 47%

Average Daily Rate

\$275 - 304

Total Revenues

\$3 - 3.7 M

Net Operating Income
(24 - 26% of total revenues)

\$710 - 875 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

CROWSNEST PASS

Ski Resort Expansion

The recent donation of the Pass Powderkeg Ski Area lands to the Municipality of Crowsnest Pass presents an opportunity to expand the Pass Powderkeg Ski Resort into a multi-season resort. A 20-year comprehensive master plan to support this expansion is currently underway. The Municipality of Crowsnest Pass is seeking corporate sponsors to finance part of a \$3 million chair lift and associated improvements to the ski hill as Phase I of the 20-year plan. Phase I would turn the ski hill into a strong multi-season destination by offering lift accessed mountain biking trails during the summer season, and enhanced downhill skiing experience in the winter, along with a possible tea house and gift shop at the summit. This first phase of development is expected to increase the number of skier visits from 15,000 to 30,000 per year.

The resort's existing facilities include 1,200 feet of vertical, 25 acres of skiable terrain, 15 runs, terrain park and rail garden, a two storey 3,000 square foot lodge with 120 seats, ski rentals and ski school program. Over the years, Pass Powderkeg Ski Hill has undergone improvements including additional runs, the development of a mountain biking trail system, the addition of a terrain park, enhanced snowmaking abilities, enriched programming and

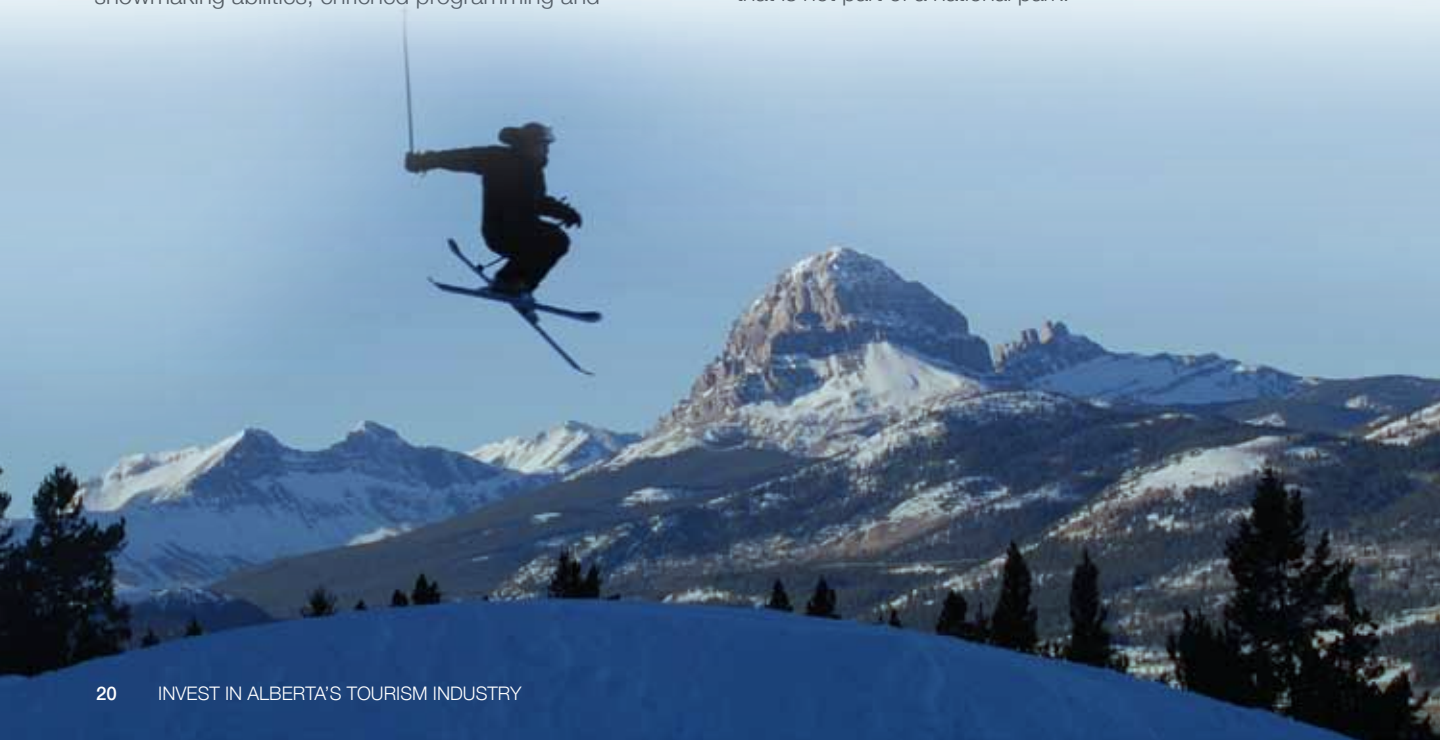
marketing. As a result, visitation levels have increased from an average of 3,000 skier visits per year to an estimated 15,000 today. The resort currently has an operating season of 75 to 80 days.

The 20-year plan for this community-based project also includes medium to long term, private business development and investment opportunities such as development of a hotel, RV park, townhomes and single family homes for recreational resort ownership, and employee housing.

Site

Pass Powderkeg Ski Area is centrally located in Blairmore, Alberta in the Municipality of Crowsnest Pass. Highway 3 provides primary access to the area with the Alberta-British Columbia border located approximately three kilometres directly west of Blairmore. The ski area is located approximately 2.5 hours from Calgary, 1.5 hours from Lethbridge and 45 minutes from Fernie, making it easily accessible to its nearby Alberta and British Columbia markets.

Crowsnest Pass is a scenic region known for its recreational potential and currently attracts domestic and international visitors. The region is known as one of the last remaining mountain destinations, whose full tourist potential has yet to be developed and explored. It is also one of the few locations in the Canadian Rocky Mountains that is not part of a national park.



Market Attraction

The successful expansion of the resort would incorporate multi-use and multi-seasonal activities, particularly those that target the youth segment and family market.

Future expansion could enhance visitation from *Free Spirit* travellers. *Free Spirits* are outdoor recreation enthusiasts and enjoy activities such as winter sports, mountain biking, hiking, fly-fishing, cycling, tubing, and rafting/kayaking/canoeing. Many *Free Spirits* enjoy family trips and a family-friendly resort with good access to the towns and attractions within Crowsnest Pass would be very appealing. Access to culinary, luxury accommodation and shopping opportunities would further attract *Free Spirits* to the ski hill.

*Authentic Experiencers*³ are likely to visit the resort during the less busier months. Features such as self-guided heritage visits and locally-sourced food would appeal to this potential high-yield market.

The installation of a chair lift and associated infrastructure improvements is expected to increase skier visits from 15,000 to 30,000 per year and would also appeal to the following target markets:

- Local and regional family, seniors and learners ski market - Pass Powderkeg is referred to as a feeder in the ski industry, by introducing new people to the sport and creating life-long enthusiasts;
- Skiers from Calgary, Edmonton and Lethbridge travelling through Highway 3 enroute to nearby British Columbia ski resorts in the Fernie and Kimberley area. The installation of a new chair lift will provide a visual announcement of the ski hill's transformation from a small community hill to a mid-scale regional facility;
- Independent leisure travellers during the summer, primarily from Alberta, other western Canadian provinces, the U.S. and overseas tourists who are interested in taking in scenic views from the chairlift and/or hiking the mountain's multi-use trail system;
- Mountain biking enthusiasts and associated organizations, such as the International Mountain Biking Association and other accredited mountain biking circuits;
- Domestic and international tour groups visiting southwestern Alberta; and
- Small meeting groups and social events of up to 120 persons, interested in renting the Pass Powderkeg Day Lodge.

³ This market segment is typically comprised of understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Financial Information

The estimated capital costs for the acquisition and installation of a chair lift and related infrastructure improvements have been estimated at \$3 million. The Municipality of Crowsnest Pass is seeking corporate sponsors to finance Phase I of the 20-year master plan.

Phase I includes:

- Acquisition and installation of a chair lift;
- Expansion of existing ski runs;
- Expansion of snowmaking;
- Additional parking;
- Renovations and expansion to the ski lodge at mid-mountain to enhance food and beverage service and accommodate increased skier visits;
- Replacement and relocation of the existing handle tow in the beginner ski area with a conveyor carpet and establishment of new beginner area at the base;
- Addition of second lodge at the base, with services (ticket office, rental shop, ski school, beginner area, washrooms and retail shop) moved to the new building at the base;
- Addition of mountain bike trails that meet the international standards of the International Mountain Biking Association; and
- Possible addition of a tea house at the summit.



MUNICIPAL DISTRICT OF WILLOW CREEK

Cowboy Action Shooting Facility

Community stakeholders from the Municipal District of Willow Creek are seeking partners to develop an 80-acre Cowboy Action Shooting Facility as the provincial headquarters to host future provincial, Canadian and international championships for the sport. Phase I of the development would feature a western style façade town providing a variety of stages for shooting and a campground. This phase requires an estimated investment of \$250,000. As the number of competitions and demand for this sport increases, additional development could feature an RV park and a clubhouse with an indoor range and restaurant.

Cowboy Action Shooting™ is a multifaceted amateur shooting sport in which contestants compete with firearms typical of those used in the taming of the Old West. Competitions are staged in a unique, characterized, Old West style. It is a timed sport in which shooters compete for prestige on a course of different shooting stages. One of the sport's unique aspects is the requirement placed on authentic period or western screen dress. The sport does not offer competitors money or merchandise prizes, thereby ensuring a fun, family-oriented sport. However, vendors selling merchandise at these events will often donate items for prizes.

Site

The Cowboy Action Shooting Facility requires a minimum site of 40-acres but ideally up to 80-acres in size. The site should be located in a rural location and removed from residential development with other requirements that include access to water and straw for horses and backs onto a hilly area to stop ammunition.

Land parcels located in the Municipal District of Willow Creek in the Porcupine Hills, in close proximity to Granum and Claresholm, would be well suited for this opportunity. This area provides the destination appeal for this type of investment by offering a western culture that includes a number of active rodeos, the Cowboy Trail, the Cowboy Poetry Festival, as well as farming and ranching.

In western Canada, there are seven Cowboy Action Shooting facilities including:

- Trap and Sheet Range Club House, Comox, British Columbia;
- Hefley Creek Range, Kamloops, British Columbia;
- Mission Rod & Gun Club, Mission, British Columbia;
- Hope Rod & Gun Club, Hope, British Columbia;
- Sherwood Park Fish and Game Range, Sherwood Park, Alberta;
- Pebble Ridge Range, West of Rocky Mountain House, Alberta; and
- Spruce Grove Gun Club, Spruce Grove, Alberta.

The Canadian National championships have historically rotated between Alberta and British Columbia; however, there is a current lack of ranges with adequate facilities to host provincial or national championships in Alberta.



Market Attraction

Projected demand for the proposed facility in year one is 20 events with an estimated attendance of 1,400. Demand is expected to increase to 47 events by year five with an annual attendance of 3,500 persons.

Potential target markets include:

- Cowboy Action Shooting enthusiasts including members of the Saskatchewan Association of Western Shootists (SAWS), Alberta Frontier Shootists (AFS), Single Action Shooting Society (SASS), Rocky Mountain Rangers, and Western Canadian Frontier Shootists;
- Cultural history enthusiasts with interest in western culture (e.g. western-themed festivals and events);
- Friends and families of the sport and cultural history enthusiasts;
- Independent and group leisure tourists interested in viewing and/or participating in the sport;
- Individuals and education groups interested in firearm safety courses;
- Groups interested in renting the facility for social events such as dances, reunions and weddings; and
- Film industry for western film shoots.

The facility could be more appealing to long haul travellers if there is access to other area attractions to make the trip worthwhile, or the facility could be marketed as part of a sightseeing circuit within western Canada.

Financial Information

Capital costs have been estimated at almost \$250,000 for Phase I. The long term development costs following Phase 1 are estimated at nearly \$2.3 million (costs include guest and member facilities such as saloon with dance floor, clubhouse with indoor range and 35 RV sites). These estimates assume a significant degree of volunteer labour, particularly in the initial development stage.

Phase I for the proposed facility includes:

- Acquisition of an 80-acre site in the Porcupine Hills area, with access to water;
- Purchase of a used track hoe and earth buggy/dump truck to move the soil and build the match bays;
- Donation of two barns in order to build the cowboy town façade with the barn boards;
- Steel targets;
- Outdoor tent with plywood dance floor; and
- A group camping area.

As the number of events and attendance increases, future development plans call for:

- An open corral with rail fencing to accommodate mounted shooting;
- The addition of spectator bleachers;
- An 8,000 square foot clubhouse and indoor range; and
- 35 serviced RV sites.

COWBOY ACTION SHOOTING FACILITY, MD OF WILLOW CREEK

Estimated Capital Requirements

Phase 1: initial start-up costs including land acquisition

\$250 K

Estimated Capital Requirements

Long term development costs

\$2.3 M

PROJECTED OPERATING RESULTS SUMMARY for Cowboy Action Shooting Facility (Years 1 to 5)

Event Days

Average Entrance Fee

Total Revenues

Net Operating Income
(50 - 70% of total revenues)

22 - 53

\$28 - 30

\$65 - 210 K

\$34 - 155 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

PINCHER CREEK, CROWSNEST PASS OR CASTLE MOUNTAIN

Zipline Development

An opportunity is available for investors interested in developing a zipline attraction and outdoor high ropes adventure course in one of three potential locations in southwest Alberta: Pincher Creek, Crowsnest Pass or Castle Mountain.

Zipline/canopy tours first originated in Costa Rica about 20 years ago. These tours combine the excitement of a cable ride along tree tops with habitat and wildlife education, creating a new and unique adventure industry. Ziplining is a hybrid of the forest canopy concept, allowing thrill seekers the experience of flying through the trees, over streams and valleys with higher speeds and greater elevation changes. Ziplines are generally man-made support structures and anchors while canopy tours provide aerial walkways with platforms attached to trees. Today, many amusement parks, outdoor camps and mountain resorts offer ziplines and canopy tours of varying heights and lengths to satisfy the increased interest in the activity.

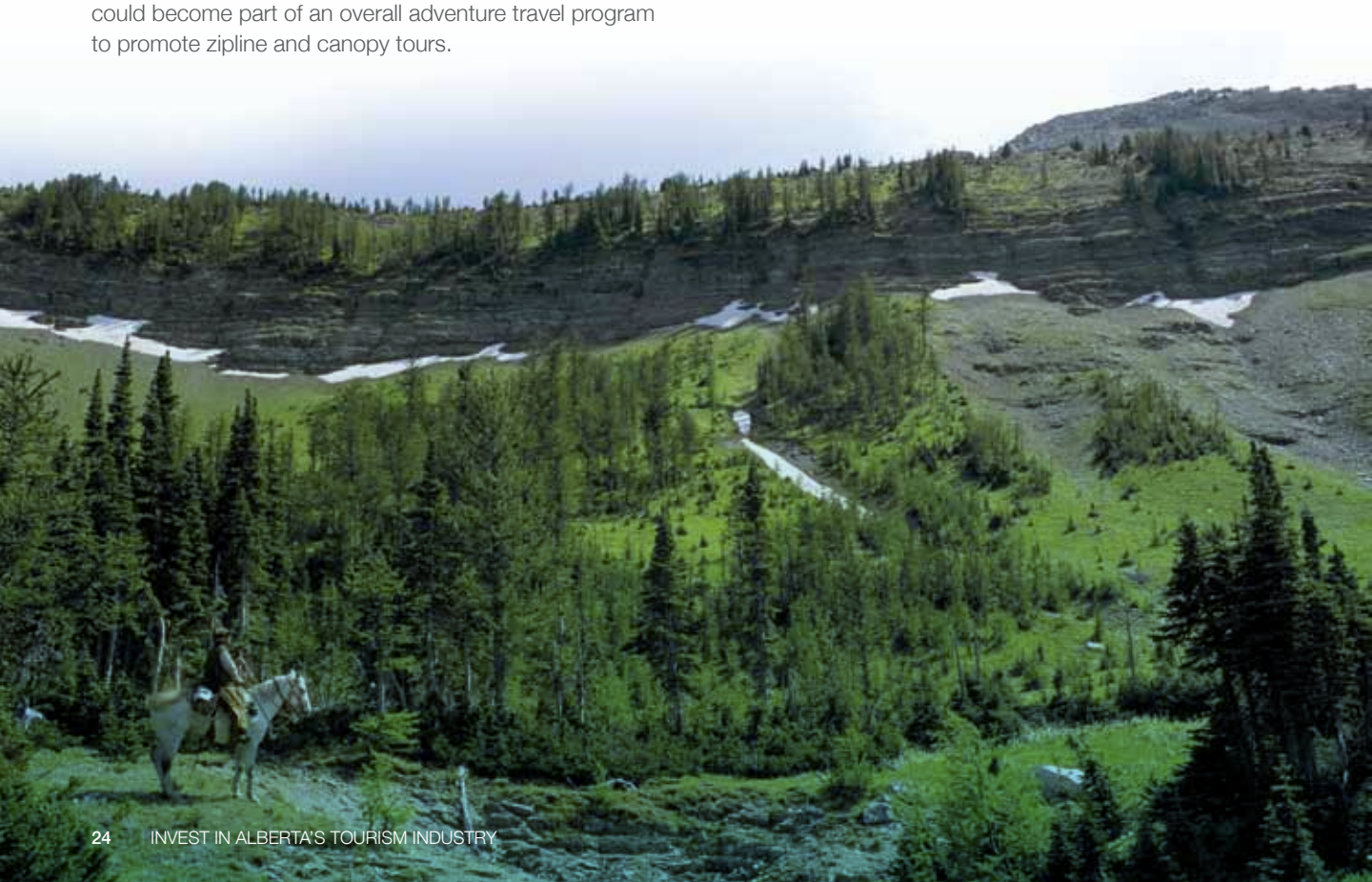
The proposed zipline development could lead to additional business development opportunities including an eco lodge, campground and recreation centre. These amenities could become part of an overall adventure travel program to promote zipline and canopy tours.

Site

Successful zipline operations tend to be established in an existing adventure activity area. For example, a skiing related operation, such as Whistler, British Columbia. The most common market characteristics that determine the location for commercial ziplines are:

- Access to reliable tourism trade, preferably year round;
- Access to other activities to attract and integrate offerings;
- Accessible mountainous environment;
- Beautiful scenery; and
- Ability to leverage existing physical structures.

For safety reasons, trips are cancelled during high winds or electrical storms, which could be an issue for any potential sites within Pincher Creek, Crowsnest Pass or Castle Mountain. Wind and other exposure issues should be investigated and tested early in the due diligence for this particular investment opportunity.



Market Attraction

There are currently five zipline attractions in Alberta. Adult admission prices can range from \$13 to \$99, with experiences varying from an adrenalin rushed single zipline ride to a challenging 2.5 hour ropes course ending with a zipline descent back to the ground.

Ziplining would appeal to *Free Spirits*, particularly if the location is close to other attractions and services that appeal to this specific segment. They are also likely to include this among a list of activities that they can undertake with their children.

Potential target markets for the proposed attraction also include:

- “Accomplisher” tourists – thrill-seekers willing to pay for extreme forms of adventure;
- School groups;
- Corporate retreats;
- Summer season, independent leisure travellers primarily from Alberta and British Columbia, as well as a smaller percentage of travellers from international markets seeking soft adventure; and
- Domestic and international tour groups visiting southwestern Alberta with itineraries featuring adventure travel.



Financial Information

The investment required is estimated at approximately \$1 million inclusive of course construction and installation, grounds maintenance and improvements, equipment and hardware, soft costs, marketing expenses and a 5% contingency. Capital cost estimates exclude any land acquisition costs or land leases.

ZIPLINE ATTRACTION, PINCHER CREEK, CROWSNEST PASS OR CASTLE MOUNTAIN

Estimated Capital Requirements

4 lines (excluding land costs)

\$1 M

PROJECTED OPERATING RESULTS SUMMARY for Proposed Zipline Attraction (Years 1 to 5)

Seasonal Attendance

Average Admission Rate

Total Revenues

Net Operating Income
(30% of total revenues)

8 - 10 K

\$32 - 35

\$280 - 380 K

\$85 - 115 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

MUNICIPAL DISTRICT OF PINCHER CREEK

RV Park and Campground Development

The Oldman River Reservoir area offers investors an opportunity to develop an RV park and campground. This opportunity could be located on a 15-acre parcel that would accommodate the development of 40 RV sites. It is envisioned that the proposed site would be waterfront and feature additional amenities that would include at least one central building for guest services, an eco-style resort, cabins and the future development of further sites. The area offers potential proximity to recreation and other areas of interest, and convenient and easy access from highways and town centres.

The Oldman Dam Provincial Recreation Area is home to activities that include kayaking, camping, birdwatching, canoeing, picnicking, boating, sailing, fishing, and wind surfing. Boat launches as well as canoe launches are located along the shores of the Oldman River Reservoir. Surrounding the reservoir is critical wildlife habitat such as native prairie grassland, natural wetlands and artificially created wetland areas. Wildlife viewing and fishing opportunities are bountiful. Located along the shores of the Oldman River Reservoir are a series of campgrounds and day use areas.

Site

The Oldman River Reservoir area is located in the Municipal District of Pincher Creek, which covers a land area of 3,482 square kilometres. The western boundary of the municipality borders British Columbia while the southern boundary of the municipality adjoins Waterton Lakes National Park. The Village of Cowley, the Hamlets of Beaver Mines, Lowland Heights, Lundbreck, Pincher Station and Twin Butte and the town of Pincher Creek are all located within the Municipal District. The town of Pincher Creek features approximately nine campgrounds.

The Oldman River flows roughly west to east from the Rocky Mountains, through the communities of Fort Macleod, Lethbridge, Taber, and on to Grassy Lake, where it joins with the Bow River to form the South Saskatchewan River. The Oldman Dam was constructed in 1992 where the Oldman, Crowsnest, and Castle River systems converge. The dam's operating facilities and infrastructure are contained on about 116 acres. The Oldman River Reservoir, created by the construction of the dam, is an on-stream storage facility that serves to stabilize water levels for many users in southern Alberta. Crown lands surround the reservoir.



Market Attraction

General market trends for the North American campground industry include:

- Significant growth in the past ten years in RV ownership;
- RVs are getting larger and sometimes include slide out rooms, TVs, microwaves, computers and dishwashers, resulting in the need for 50 amp power or 30 amp at minimum;
- RVs are being used as second homes creating demand for seasonal sites at campgrounds with amenities such as laundry facilities and cable connections;
- Camping with tents has declined as the baby boomer market seeks more comfort; and,
- There is a growing trend toward educational, cultural and recreational activities while camping, creating a need for campgrounds to offer these types of experiences or to be located within close proximity to these services and experiences.

Potential target markets for the proposed RV park and campground include:

- Regional *Authentic Experiencers*, mainly from southern Alberta who seek recreation activities located in proximity to bird watching, kayaking, yachting and other soft adventure activities such as birdwatching and hiking. *Authentic Experiencers* will also appreciate the proximity to some of southwestern Alberta's premier historic attractions, such as Kootenai Brown Historic Village in Pincher Creek, Head-Smashed-In Buffalo Jump and the Fort MacLeod Northwest Mounted Police Museum.

- Regional *Cultural Explorers* will also enjoy the soft recreation opportunities as part of a family getaway, as well as the opportunities for day visits to the area's heritage and cultural activities.
- *Free Spirits* would be attracted to the introduction of a potential waterfront, up-scale eco resort offering land-based recreational activities. *Free Spirits* can draw from geographical markets that include Saskatchewan and British Columbia in addition to longer-haul visitors from other parts of Canada such as Ontario.

Financial Information

The capital costs for the 40-site RV campground and one central building for washrooms, laundry and other guest services are estimated at \$1 million (inclusive of basic construction costs, furniture, fixtures and equipment, soft costs, contingency and pre-opening, marketing expenses, as well as land costs).



RV PARK AT OLDMAN RIVER RESERVOIR

Estimated Capital Requirements

Proposed 40 sites

\$1 M

PROJECTED OPERATING RESULTS SUMMARY for Proposed RV Park (Years 1 to 5)

Seasonal Occupancy	Average Daily RV Rate	Total Revenues	Net Operating Income (60% of total revenues)
60 - 62%	\$35 - 39	\$129 - 147 K	\$77 - 88 K

SOURCE: SOUTHWEST ALBERTA TOURISM INVESTMENT OPPORTUNITIES (2013)

OUTDOOR ADVENTURE

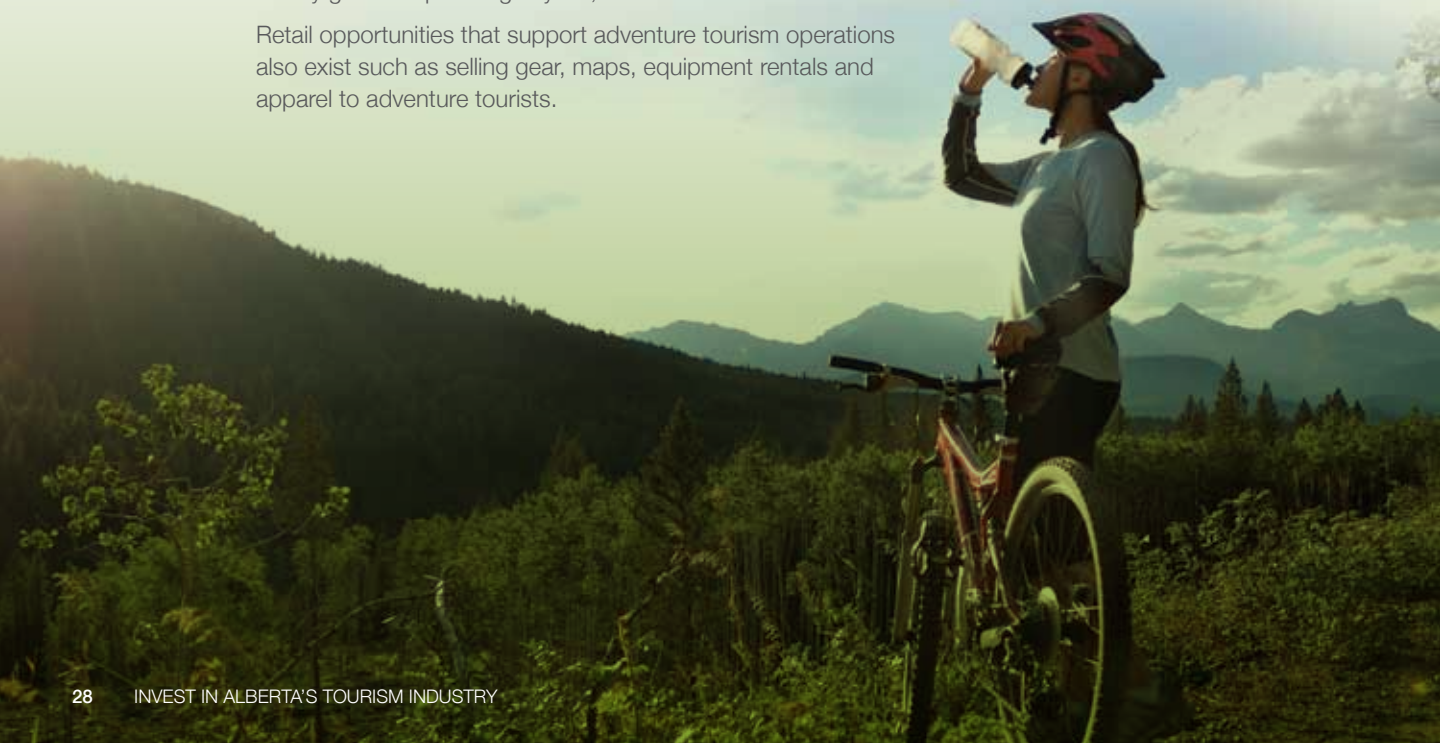
Tourism Business Opportunities in Southwestern Alberta

Southwestern Alberta is a prime spot for recreation opportunities. Hiking routes have been established over a variety of terrain, from Alberta's signature coulees, to flat prairie, river valleys and mountains – hikers of all abilities can be accommodated against a backdrop of spectacular vistas. The area is also great for cycling, particularly in areas with gently graded terrain. Winter sports, like snowmobiling, down-hill and cross-country skiing, dog sledding, ice climbing and ice fishing give way to quadding, mountain biking, spelunking and mountaineering in the summer.

The region offers these outdoor tourism opportunities for private sector business development and investment:

- The southwest region is home to many existing bike route attractions such as the Pincher Creek Bike Park and the Crowsnest Pass mountain bike trail system. Self-guided and guided adventure cycling tours can build on these existing routes and offer visitors with stops in local communities and attractions.
- Dog-sledding can be added as a winter-based activity to Waterton Lakes National Park, enhancing the park's current repertoire of activities that include lake cruises, golf, hiking and horseback riding. Dog-sledding is increasing in popularity and is available in other areas of Alberta, like Canmore and Kananaskis Country.
- Fort Macleod could offer visitors with horse riding activities to explore the region's local trails.
- Urban or rural hiking tours can build on the region's great wealth of developed hikes. These tours could also offer visitor services such as luggage transfer, meals, bed and breakfast accommodation and shopping.
- Southwest Alberta has many navigable river systems to support guided adventures. Adventures could be marketed to include two to three day guided trips using kayaks, canoes and tubes.

Retail opportunities that support adventure tourism operations also exist such as selling gear, maps, equipment rentals and apparel to adventure tourists.





Market Attraction

Alberta is rich in natural landscapes and recreational opportunities, attracting residents and other domestic visitors who enjoy outdoor recreation activities on a regular basis. Market research indicates that outdoor recreation is one of the prime trip motivators for visitors to southwest Alberta, attracting adventurers from Alberta, British Columbia, Saskatchewan and overseas.

Outdoor tourism operations in southwest Alberta would be attractive to the following potential markets:

- Summer season, independent leisure travellers primarily from Alberta and British Columbia, as well as a smaller percentage of travellers from international markets seeking soft adventure;
- Winter/outdoor recreation enthusiasts who travel primarily to participate in winter sports; and
- Domestic and international tour groups traveling to southwestern Alberta on itineraries featuring adventure travel.
- *Free Spirits, Authentic Experiencers* and *Cultural Explorers*, which have been identified as target markets for outdoor tourism by Travel Alberta. However, research indicates that Canadians have a high inclination to take part in outdoor recreation while on vacation, regardless of their “type”.

ALBERTA GOVERNMENT SUPPORT

Alberta Tourism, Parks and Recreation's Tourism Division offers a variety of services for investors seeking to invest in and develop tourism projects, businesses, and land in Alberta.

Our interest is in helping investors and developers identify viable tourism development opportunities in the province. With our knowledge of the resources, land base and characteristics of tourist visitation across Alberta, we can tailor our assistance to your needs.

Once you decide on a particular location in the province, we will direct you to key community business contacts. Our services are free of charge to qualified business investors.

Tourism Related Investment Services

Some of the services available through the Government of Alberta are described below. You can access our services through the Alberta government's international offices or by visiting us at: www.tourism.alberta.ca.

<p>Assessing and matching investment interests and financial resources with appropriate tourism business investment opportunities.</p> 	<p>Organizing site visits to review investment opportunities.</p> 	<p>Introducing investors to relevant business contacts and facilitating meetings to assist with investment interests.</p> 
<p>Availing tourism research and development information to assist with business cases or feasibility studies.</p> 	<p>Providing detailed information on tourism sectors of interest.</p> 	<p>Assistance with Crown land leasing opportunities through the Alberta Tourism Recreation Leasing process.</p> 
<p>Supplying links to the Federal Government's Business Immigration Program.</p> 	<p>Providing access to tourism related investment services through the Alberta government's international office network (Singapore, New Delhi, Beijing, Shanghai, Tokyo, Hong Kong, Taipei, Seoul, Mexico City, London, Munich and Washington).</p> 	

INVEST IN ALBERTA'S TOURISM INDUSTRY

For additional information on the opportunities contained in this booklet, and to obtain a copy of the Southwest Alberta Region Tourism Investment Opportunity Assessment, please contact:

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