

ALBERTA'S TOURISM FRAMEWORK: 2013-2020



Prepared by:

Alberta Tourism, Parks and Recreation
and
Travel Alberta

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Message from Minister of Alberta, Tourism, Parks and Recreation



As Albertans know, and visitors quickly realize, Alberta is one of the most breathtaking places on earth. Our province is as vast as it is varied in landscape and experiences. We are a four-season destination with so much to offer; the iconic Canadian Rocky Mountains, the alluring Canadian Badlands, peaceful prairies, placid lakes, a diverse cultural history and vibrant urban and rural centres.

Tourism plays a vital role in showcasing our province to the world and provides those of us fortunate enough to live here with memorable experiences to share with friends and family.

Our tourism industry also has great potential to diversify Alberta's economy, which is why growing our tourism industry by 32 per cent – from \$7.8 billion to \$10.3 billion – by 2020 is key to building Alberta.

Alberta's tourism industry is complex, with many organizations in both the public and private sector involved. To grow the industry and maximize the opportunities tourism creates in every region of the province, we need a common vision, goal, and priorities to guide us. We need a plan.

The Alberta Tourism Framework is about trading industry competition for collaboration – unifying and focusing our efforts to meet the needs of travellers from Alberta, Canada and around the world.

Thank you to everyone who contributed to developing the Alberta Tourism Framework. By working together, we can help every park of our province prosper. I look forward to hearing your success stories.

Dr. Richard Starke
Minister, Alberta Tourism, Parks and Recreation

Message from Travel Alberta



Competition in tourism marketing is building both in Canada and around the world. The marketplace has never been more aggressive, and it's critical that we work collaboratively as an industry to ensure Alberta is positioned competitively for the future by creating new tourism experiences and aligning our industry under a common vision and goals.

The Tourism Framework is a renewed partnership between the public and private sectors to ultimately drive more economic development across the province. It is a shared responsibility to develop and secure sustainable growth – too demanding a task for any single entity to accomplish alone.

Underlying the Alberta Tourism Framework is the goal to grow tourism revenues to \$10.3 billion by 2020 and Travel Alberta's mission to grow tourism revenues with compelling invitations to visit Alberta.

The Framework is a key component to the remember to breathe destination marketing strategy that brings Alberta experiences to life for the traveller.

We remain committed to working cooperatively and transparently with our tourism partners in the best interest of tourism in Alberta. Moving forward, Travel Alberta will work closely with TPR, the Alberta Strategic Tourism Council and key tourism industry organizations to implement the Tourism Framework.

Thank you for your support in making Team Alberta the best and most efficient it can be.

Quincy Smith
Chair, Board of Directors
Travel Alberta

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EXECUTIVE SUMMARY

Tourism is a complex industry, with many organizations involved, and no one organization controls all elements. **Alignment of key catalyst organizations** under one Framework gives Alberta its best chance to be successful. Alignment will bring efficiency to our efforts.

Coordinated leadership will focus our industry on preserving and enhancing the quality of our existing tourism experiences. It will focus us collectively on attracting new market segments to innovative, world-class experiences in Alberta. It will focus our industry collectively on creating new and enhanced tourism experiences, creating packages, improving hospitality, and growing or enhancing destination areas in Alberta. Success in these areas will grow by coordinating efforts across government as we endeavour to be a desirable place to live, work, travel and study. In addition, it will align with the Government of Alberta's international work of building Alberta's reputation as a responsible global citizen by presenting a more fulsome picture of our province and convey our shared values with our international partners.

The starting point is to align Travel Alberta; Alberta Tourism, Parks and Recreation; and the Strategic Tourism Council behind a single, multi-year Framework. The Minister charged Alberta Tourism, Parks and Recreation (ATPR) and Travel Alberta with drafting this Framework. Industry input has been incorporated.

1.1 Alberta's Tourism Legacy

Since the first tourists visited Banff's hot pools in the railway era of tourism, Alberta has hosted travellers from many parts of the world. As their experience with Alberta increased, travellers wanted to see more.

Today's tourist seeks meaningful experiences wherever they can be found in the world. They search the Internet and social media for exceptional experiences tailored particularly to their interests. They respond to destination brand and to iconic experiences. Once they have chosen the experience, they consider the service reputation and the tourism services of the destination.

Alberta's tourism experience must resonate with this traveller – the traveller who wants to be inspired by authentic Alberta tourism experiences that cannot be found anywhere else. It is our challenge as a tourism industry to create and market those experiences.

1.2 Alberta's Focus

Alberta's Framework will create and market new and enhanced authentic Alberta tourism experiences in all regions of Alberta. The primary concept of the framework is that our focus will be on the traveller/consumer. The efforts of industry leadership, catalyst organizations involved in supporting tourism, along with our product development and marketing efforts are all focused on the traveller.

Four additional concepts underpin the framework:

- **Traveller Preferences:** The specific preferences for tourism experiences of our highest priority travellers;
- **Canadian Tourism Commission Explorer Quotient (EQ) Segments:** Free Spirits, Cultural Explorers and others, an expression of traveller preferences;
- The **Path to Purchase** and where our target travel markets sit on that path; and
- The **Destination Development Cycle**, creating balanced and stepwise growth of our tourism regions.

In short, the Tourism Framework will be focused on aligning our tourism system and all its parts to create value for the traveller. The key organizations in tourism will be focused on helping operators succeed by creating and marketing exceptional, authentic Alberta experiences for those travellers.

1.3 Where Are We Now?

In the past decade, due primarily to global shocks that have impacted tourism, Alberta's tourism performance has fluctuated. Canada's share of global tourism has fallen, and our ranking as a tourism destination has declined.

The good news is Alberta has managed to maintain market share in domestic and international markets during this turbulent decade. It is poised for growth in the coming decade.

Alberta has very strong provincial and regional markets from which travel can be stimulated. It has highly targeted domestic and international markets where growth is being targeted in specific segments.

1.4 How Should We Grow?

Our tourism destination areas and products have served our markets well, and we can do better. This Framework identifies tourism opportunities which we can act on. All regions in Alberta can improve, building tourism destinations within them with specific, exceptional tourism experiences. We will grow by addressing tourism experience and market development in all of our tourism regions, by providing what the traveller wants, and by tapping into new and growing markets both domestically and abroad.

1.5 Alberta's Tourism Brand: A Key Pillar of the Framework

In the spring of 2010 Travel Alberta embarked on a journey to develop a tourism brand that would differentiate the Alberta travel experience from travel experiences elsewhere in Canada and around the world. It was realized that, in order to be competitive within the tourism arena, a compelling destination proposition had to be developed in order to compete for the visitor. The Alberta tourism brand promise – “Goosebump” moments is a promise we make to travellers and Alberta residents that truly reflects the kinds of unique, emotional experiences that are available to visitors to all regions of the province. It is a key component to the overall (remember to breathe) destination marketing strategy that brings Alberta experiences to life for the traveller.

It is important to note that the Alberta tourism brand aligns closely with the Alberta provincial brand. The Alberta tourism brand is a pillar of the Alberta Tourism Framework. The Alberta tourism brand will impact all areas of the Tourism Framework as the traveller centric voice that amplifies the efforts of Alberta Tourism, Parks and Recreation, Travel Alberta and tourism stakeholders to develop and grow tourism activity all across Alberta.

1.6 Drivers of Alberta's Tourism Framework

The key drivers of Alberta's Framework, detailed in this document, are:

- **Research-Based Framework:** Framework initiatives will be based on quality research, measurement and evaluation of results;
- **Alignment** of key agencies, regions and the Government of Alberta around the Framework;
- **Destination Accessibility:** Air and highway access issues;
- **Market Transformation and Competitive Environment:** We need to adjust to the reality that travellers seek experiences and destination choice is secondary;

- **Product/Experience Development and Investment:** Our products and experiences must be refreshed and new authentic Alberta experiences created to address the global competition;
- **Public Land Access:** Streamlined Crown land access for tourism must be in place;
- **New Destinations:** New tourism destination areas must be identified and developed;
- **Land Use Framework (LUF):** Building tourism priorities into the Land Use Framework will support the Tourism Framework;
- **Collaborative Tourism Initiative (CTI):** Regions and product clusters more effectively grow tourism under a supportive, integrated platform for working with key catalyst organizations. The CTI concept is being developed in one region and with one industry sector initially and other regions and sectors/product clusters may be considered as government support for destination management expands.
- **Whole of Government Support:** Adoption of Alberta's Tourism Framework will enhance support from departments and agencies of the Government of Alberta.

1.7 Vision of Alberta's Tourism Framework

Innovative leadership, a flourishing unified industry, traveller-focused authentic experiences, creating prosperity in Alberta.

Seven **core principles** will guide us as our industry works together:

- Collaboration;
- Traveller-Focused;
- Integrated Destination Management;
- Research-Based Decisions;
- Tourism Innovation and Excellence;
- Accountable and Transparent; and
- Economic, Social, and Environmental Benefits.

1.8 Alberta's Tourism Goal

Tourism in Alberta is a \$10.3 billion industry by 2020 providing sustainable economic benefits to all regions of Alberta.

1.9 Key Priorities of Alberta's Tourism Framework: 2013 – 2020

Our key priorities are those few things we must do to succeed. While not listed in order of importance, we must accomplish all of them under Alberta's Tourism Framework.

PRIORITY #1: INNOVATION AND DEVELOPMENT: Alberta actively encourages entrepreneurial investment in traveller-focused development of innovative tourism experiences, destination renewal, and new destination areas.

PRIORITY #2: ACCESSIBILITY: Access to Alberta and its tourism regions improves.

PRIORITY #3: MARKETING: Grow tourism revenues by directing the Alberta tourism brand at high potential markets. We will lead with authentic experiences in breathtaking landscapes that drive visitation throughout the province.

PRIORITY #4: ALIGNMENT: Industry organizations actively align and transparently communicate their efforts in pursuit of our common goals.

PRIORITY #5: RESEARCH: A comprehensive, science-based research approach drives decisions.

1.10 Collaborative Tourism Initiative

A new Collaborative Tourism Initiative is underway in one region and with one industry sector. Other regions and industry sectors with tourism opportunities may be considered as government support for destination management expands. Tourism opportunities identified within the Land Use Framework regions will also be considered.

1.11 Alberta's Key Objectives: 2013-2020

Key objectives describe what we are going to accomplish in enough detail that we will know when we get there. The 21 key objectives, prepared for each priority, are listed following. Detailed, measurable tactical plans will be prepared for each objective. The key organizations responsible for execution will be accountable for those tactical plans.

PRIORITY #1: INNOVATION AND DEVELOPMENT: Alberta actively encourages entrepreneurial investment in traveller-focused development of innovative tourism experiences, destination renewal, and new destination areas.

1.1: Access to public land for tourism development is improved and streamlined.

1.2: Destination development areas are identified and planning and approval processes for tourism development are in place.

1.3: Support for priority tourism development areas is enabled through collaboration at all levels of government.

1.4: Tourism experience gaps and weaknesses are identified, research addresses specific market needs, and new and enhanced tourism products and experiences are provided for the traveller.

1.5: Industry has improved access to capital investment for tourism development.

PRIORITY #2: ACCESSIBILITY: Access to Alberta and its tourism regions improves.

- 2.1:** Increase air access to and within Alberta from priority target markets to grow inbound travel annually.
- 2.2:** A robust, consistent, and affordable highway signing and wayfinding system for tourism regions and experiences is fully functioning.
- 2.3:** Well-coordinated, convenient, relevant and innovative multi-channel visitor information services engage and encourage visitors through every stage of their travel journey.
- 2.4:** The tourism industry has access to a motivated, educated/trained, skilled and professional tourism labour force.

PRIORITY #3: MARKETING: Grow tourism revenues by directing the Alberta tourism brand at high potential markets. We will lead with authentic experiences in breathtaking landscapes that drive visitation throughout the province.

- 3.1:** Alberta's tourism brand awareness and marketing efforts are effective in international and domestic markets.
- 3.2:** Revenue generating capabilities of industry partners is increased.
- 3.3:** Drive destination competitiveness through industry partner collaboration.
- 3.4:** Marketing and development strategies, prepared with Collaborative Tourism Initiatives and integrated within Alberta's Tourism Framework, are being executed.

PRIORITY #4: ALIGNMENT: Industry organizations actively align and transparently communicate their efforts in pursuit of our common goals.

- 4.1:** Piloted Collaborative Tourism Initiatives prepare regional and sectoral destination management plans that are aligned and integrated with Alberta's Tourism Framework and are being executed.
- 4.2:** Major catalyst organizations (Alberta Tourism, Parks and Recreation; and Travel Alberta) execute a coordinated approach to access and delivery of tourism development and marketing services.
- 4.3:** Federal, Provincial and local government policies are better aligned with tourism priorities.
- 4.4:** Recognition, understanding and support of tourism as a major contributor to the Alberta economy increases within government, communities, and among Albertans.

PRIORITY #5: RESEARCH: A comprehensive, science-based research approach drives decisions.

- 5.1:** A government-led research funding model prioritizes research and funds and manages delivery of high quality core, performance, and forward-looking tourism research.
- 5.2:** Tourism organizations access innovative dashboard data on current, comparative and historic tourism performance.

5.3: Research on desired tourism experiences for international and domestic target markets informs tourism experience development.

5.4: Comprehensive measures of performance and visitor satisfaction informs industry and key target audiences of the value of tourism.

1.12 Implementation

The implementation process will begin in 2013.

1.0 WHY A TOURISM FRAMEWORK FOR ALBERTA?

1.1 A Framework to Grow Alberta's Tourism Industry

Since the late 19th-century when mountain guides first began taking tourists on hikes in the Canadian Rockies, Alberta has been a leader in Canadian tourism. In recent years, Government has transformed our industry with the creation and levy-based funding of Travel Alberta, a Crown Agency, and refining the mandate of Alberta Tourism, Parks and Recreation (ATPR).

In the fall of 2012 industry and Government leaders agreed that we might do significantly better if we aligned those plans and our activities through a single, collaboratively-developed framework— *Alberta's Tourism Framework*.

The Minister charged ATPR and Travel Alberta with drafting this Framework. Industry input has been incorporated.

1.2 Rationale for a Tourism Framework for Alberta

The origins of “leisure” tourism in western Canada date back to the early beginnings of guided tours in the Canadian Rockies, with respite in the hot springs, and pampering in the rail “castles” such as the Banff Springs Hotel, Chateau Lake Louise and back country lodges.

Today, over 100 years later, 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 the province. Tourism in Alberta accounts for over \$7.8 billion in total visitor spending annually. This activity generates an estimated \$1.15 billion in tax revenues for the Alberta government and employs approximately 139,000 people province-wide.

Tourism is of significant strategic value to the province:

- **Tourism is an economic platform, not a single sector** - 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 in Alberta are small and medium-sized with many being family owned and operated. There are currently over 19,000 businesses in Alberta supported by tourism.
- **Tourism has growth potential** - ATPR Research demonstrates that Albertans have an increasing, and strong interest in visiting other parts of their province with the potential to generate over 30% growth over the next decade.
- **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, Ag-Tourism and Nature-based Tourism offer great opportunities for development of new products.
- **Tourism contributes to the awareness and positive image of Alberta in the global marketplace** - Tourism can enhance our reputation and awareness worldwide. Tourists are potential investors and can become valuable ambassadors for business development

This Framework responds to the need to focus the province's diverse tourism industry to develop a strategic, long term plan for tourism. The Framework identifies key priorities and results to 2020 - some for government to implement, some that the industry can work on and some that will require partnership among several players in the tourism industry.

Alignment of key catalyst organizations under one framework gives Alberta its best chance to be successful. Alignment will bring efficiency to our efforts. Alberta's Tourism Framework will align our industry and organizations around shared goals, values, and priorities that we will accomplish collectively by 2020. It will focus coordinated leadership on our shared priorities and how we will measure our accomplishment. The Framework will provide focus on two overall priorities:

- Creating compelling, authentic tourism experiences that focus on the needs of travellers; and,
- Aligning our industry under one Framework to foster effective development and marketing.

All stakeholders in the tourism industry will be important partners in the success of the Framework.

1.3 Alberta's Tourism Brand: A Key Pillar of the Framework

In the spring of 2010 Travel Alberta embarked on a journey to develop a tourism brand that would differentiate the Alberta travel experience from travel experiences elsewhere in Canada and around the world. It was realized that, in order to be competitive within the tourism arena, a compelling destination proposition had to be developed in order to compete for the visitor. The Alberta tourism brand promise – “Goosebump” moments is a promise we make to travellers and Alberta residents that truly reflects the kinds of unique, emotional experiences that are available to visitors to all regions of the province. It is a key component to the overall (remember to breathe) destination marketing strategy that brings Alberta experiences to life for the traveller.

It is important to note that the Alberta tourism brand aligns closely with the Alberta provincial brand. The Alberta tourism brand is a pillar of the Alberta Tourism Framework.

The Alberta tourism brand will impact all areas of the Tourism Framework as the traveller centric voice that amplifies the efforts of Alberta Tourism, Parks and Recreation, Travel Alberta and tourism stakeholders to develop and grow tourism activity all across Alberta.

1.4 Core Concepts of Alberta's Tourism Framework

The tourism industry is one of the most complex industries and systems in our economy, as it draws from and relies on many other sectors as components of its product offering. Fundamentally, the industry relies on others to provide high quality elements of its product, and it is not in control of the quality of those elements. Dimensions of the industry include natural and built environments, the sectors of tourism, private and public sector catalyst organizations, and the society as a whole. The challenge for tourism is to focus these elements on the Traveller, who is the very core of the tourism system.



Source: Alberta Tourism, Parks and recreation 2012

1.4.1 Creating Value for the Traveller

By focusing our attention on the primary reason for tourism – the Traveller – we can build our markets, enhance our product offering, create new destination areas, and build tourism value and contribution to provincial, regional and local economies.

The first step is to align our industry around a clear goal and key priorities.

1.4.2 Aligning the Catalyst Organizations in Alberta’s Tourism System

Source: Alberta Tourism, Parks and Recreation 2012

A compelling rationale for a common Framework is to align our efforts around:

- Collaboratively-developed goals, key priorities and results;
- A shared understanding of who “leads” and who supports among the various catalyst organizations, and for which markets and products; and
- Shared metrics for the measurement of outcomes against key objectives.



Source: WMV Research

The essence of the Framework is focus. It is choosing *those few things which, if done well and at the right time, will spell success*. If the key catalyst organizations illustrated galvanize around the same goal and work together to accomplish the same key priorities focused on the traveller, we will succeed.

All stakeholders must contribute to creating the Framework, embrace the goal and key priorities, and the organizations representing those stakeholders must continually support their alignment around our Tourism Framework.

Communication efforts of the key catalyst organizations must be aligned in support of our key priorities, and individual organizations must be accountable for their results.

1.5 Focus on the Traveller

Travel Alberta has partnered with the Canadian Tourism Commission (CTC) to base its market segment research, selection, targeting and marketing on the basis of research-based traveller preferences. Travel Alberta has used the Explorer Quotient™ (EQ) and the Market Portfolio Analysis (MPA) system of the CTC to identify country markets and EQ segments that are best matched to Alberta's tourism product as it exists today. Across all our international and domestic markets, Travel Alberta targets two EQ segments:

- Free Spirits; and
- Cultural Explorers.

Free Spirits are Alberta's primary target market outside of Alberta. This segment is receptive to marketing/advertising messages. They are significantly more likely to visit many locations in a single trip, and brag about their travel experiences, both online and offline.

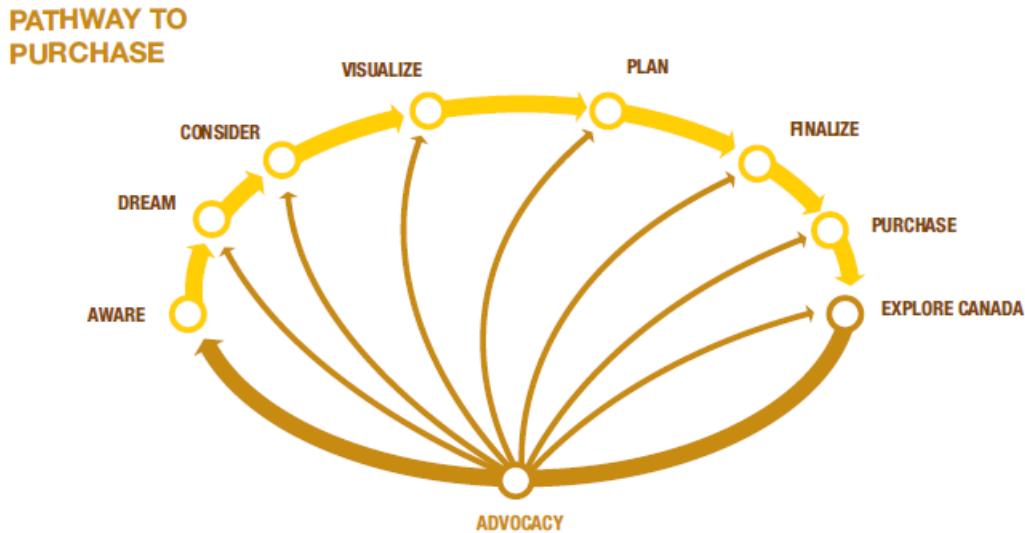
Free Spirits come from all demographic groups (age, income, education) and represent 13% of global travel markets. They are youthful adventurers that come from all over the world, and they are even represented in our domestic and regional markets. Free Spirits live to travel. Travel satisfies their natural and insatiable need for excitement. They desire the best of everything and want to be with others who feel the same way. They have a lot of energy. They are young-at-heart and travel for the thrill and the emotional charge of doing things. They research their travel destinations, seek trustworthy marketing sources, and plan trip itineraries around Top 10 or "best of" lists.

Cultural Explorers, representing 12% of global markets, are always planning for their next trip and are likely to travel with friends and family. They want to immerse themselves in the culture, people and settings of the places they visit. They enjoy the history, but also look to experience the modern culture. Prior to every trip, they research their destination to better understand it and once they are there, they prefer to let things unfold spontaneously. They want their trips to go beyond just seeing the tourist sites so they strive to leave the beaten path and explore out-of-the-way places. According to results from the Potential Demand for Rural Vacation Experiences in Alberta by Residents of Alberta, a study commissioned by Alberta Tourism, Parks and Recreation, cultural explorers were the most knowledgeable EQ segment and had the highest chance of visiting a rural location in Alberta within the next two years.

Further research work will be completed to better understand the Alberta regional traveller, those travellers from Alberta and close-in domestic markets who visit (in particular) Alberta's rural regions.

1.6 Path to Purchase

Travel Alberta has adopted the Path to Purchase Model developed by the Canadian Tourism Commission to illustrate this process and to track Alberta's tourism brand performance at every stage of the consumer lifecycle. The consumer takes a measurable path from first developing awareness right down to the actual point of purchasing an experience.

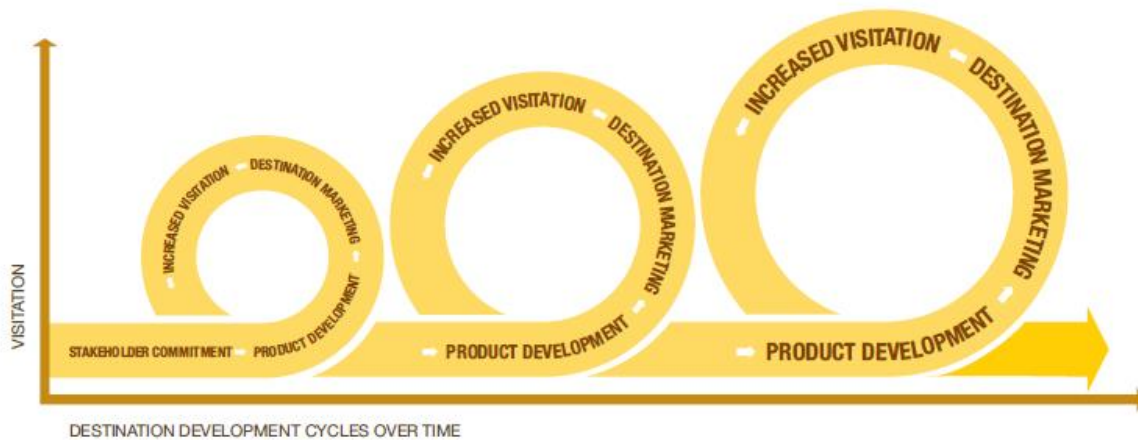


Source: Canadian Tourism Commission

The Path to Purchase model aims to better understand and distinguish between prospective and non-prospective travellers and where they are along the path, as well as to provide the ability to better anticipate a prospective consumer's needs, perceptions and behaviours at each stage. By better understanding where potential travellers are along the path to purchase, our industry players can better align their efforts to respond to the needs of travellers.

1.7 Destination Development Cycle

Sustainable destination growth and development requires a balancing of product development, destination marketing, and capacity development to handle increased visitation over the long term. Stakeholder alignment, communication, and commitment ensure sustainable growth over time. The destination development cycle graphic following illustrates this concept.



Source: Malone Given Parsons Ltd., Dry Island Buffalo Jump Provincial Park and Area Tourism Development Plan, 2010

- **Product Development** will be fostered by catalyst organizations working with tourism operators and regions. Physical infrastructure development, tourism infrastructure, physical tourism product development and tourism experience development are different facets of product development and focus areas for partners.
- **Destination Marketing:** Research-based, traveller-focused, creative, and innovative destination marketing grows interest in destination experiences in Alberta, providing the platform to grow visitation.
- **Increased Visitation:** Great experiences stimulate word-of-mouth advertising, social networking, and expectations of even better experiences.

Alberta's Tourism Framework will create partnership of key players to undertake research, plan, renew, develop and market tourism destinations within Alberta.

2.0 SITUATION ANALYSIS OF ALBERTA'S TOURISM INDUSTRY

It is important to take an honest and detailed look at the present state of tourism in Alberta. This assessment provides insights to market opportunities and identifies areas for improvement. It concludes by identifying the key challenges and opportunities we must address to succeed.

2.1 Global Tourism Transformation Underway

Tourism is one of the fastest growing sectors worldwide and countries around the world are meeting growing demand by creating an extensive menu of competitive travel opportunities.

Canada was recently (and again) selected the 2011-2012 Top Country Brand on Future Brand's Country Brand index report and has been ranked first or second in the past five years. However, Canada's challenges are many. In 1950, the top 15 country destinations held 97% of the world's tourism market share. Canada ranked second. In 2010, Canada ranked 15th in the world for international tourism receipts.¹

This data underlines the dramatic changes in international destinations and tourism in the past several decades. New destinations have been created and competition is intense. Recent dramatic cuts by the Government of Canada to the Canadian Tourism Commission budget, from its current \$72 million to \$58 million in 2013-14, will impact the marketing of Canada and its global competitiveness.

Alberta has always been a prominent destination in Canada. In terms of gross tourism expenditures, Alberta was fourth in Canada in 2010. Ontario (\$22 billion) led all the provinces while British Columbia (\$13.4 billion) ranked second and Quebec (\$10.9 billion) ranked third in that year. These comparisons, based on publicly available data produced by these provinces, illustrate the broad rankings and order of magnitudes.

¹ Source: Government of Canada, Tourism Sector - Key Facts 2010

Alberta is well positioned among Canadian destinations to improve in coming years:

- Our government supports diversification of its economy over the long term and Tourism Levy funding provides the foundation to support tourism planning, marketing and development activities; and
- Our tourism system and its organizations are relatively stable and mature; our industry is strong and relatively profitable.

2.2 Alberta Market and Tourism Experience Overview

Alberta offers authentic experiences in breathtaking landscapes. This is what differentiates our destination in international markets, and this is what we sell.

Travellers are looking more for unique, breathtaking experiences than they are for destinations or activities. Internationally we are positioning our brand around these experiences (remember to breathe) and we aim them specifically at two EQ market segments.

Alberta is distinguished as a destination by the Canadian Rockies, five UNESCO World Heritage Sites, diverse landscapes, a safe and secure destination with modern infrastructure, and our reputation as an open, diverse and entrepreneurial culture.

Alberta's rural regions offer particular tourism experiences that are highly appealing to Albertans and close-in domestic markets. The Potential Demand for Rural Vacation Experiences in Alberta by Residents of Alberta will inform and refine the development and marketing of rural tourism experiences.

2.3 Market Analysis

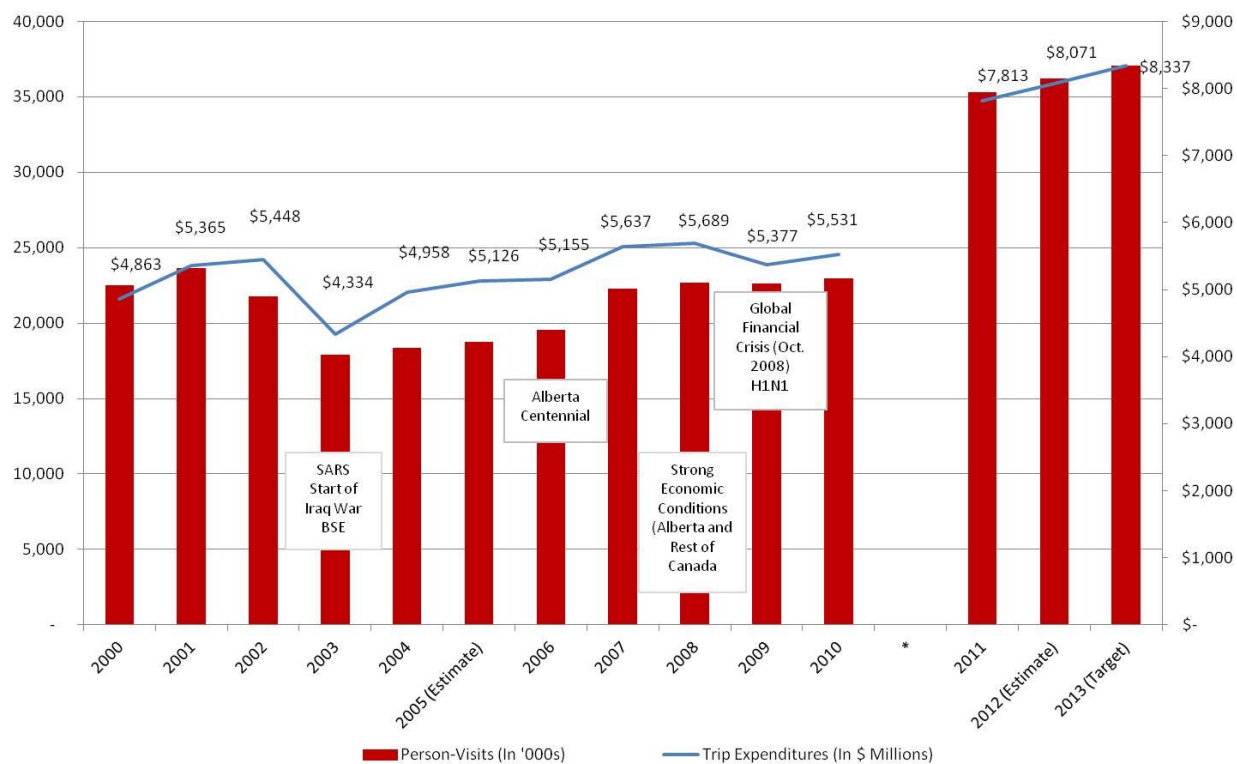
2.3.1 Progress in the Past Decade

Alberta has progressed as a destination in the first decade of the century. Total tourism expenditures in Alberta have increased from approximately \$5.15 billion in 2006, to \$5.53 billion in 2010, or approximately 1.8% per year. This outpaced the national average tourism expenditure growth rate of 1.3% over the same time period.

However, this progress was, at the very least, "bumpy" due to uncontrollable geo-political impacts that had dramatic impacts on tourism such as: 9/11, the Iraq war, SARS, the US recession and near global financial crisis.

Due to methodological changes to the 2011 Travel Survey of Residents of Canada, there is a historical break in the data series. Therefore, commencing in 2011, data for Alberta and Other Canada may not be compared with previous years. In 2011, total tourism expenditures were over \$7.8 billion. The chart following reflects this break in the data.

Tourism Person-Visits and Expenditures in Alberta
2000 - 2013



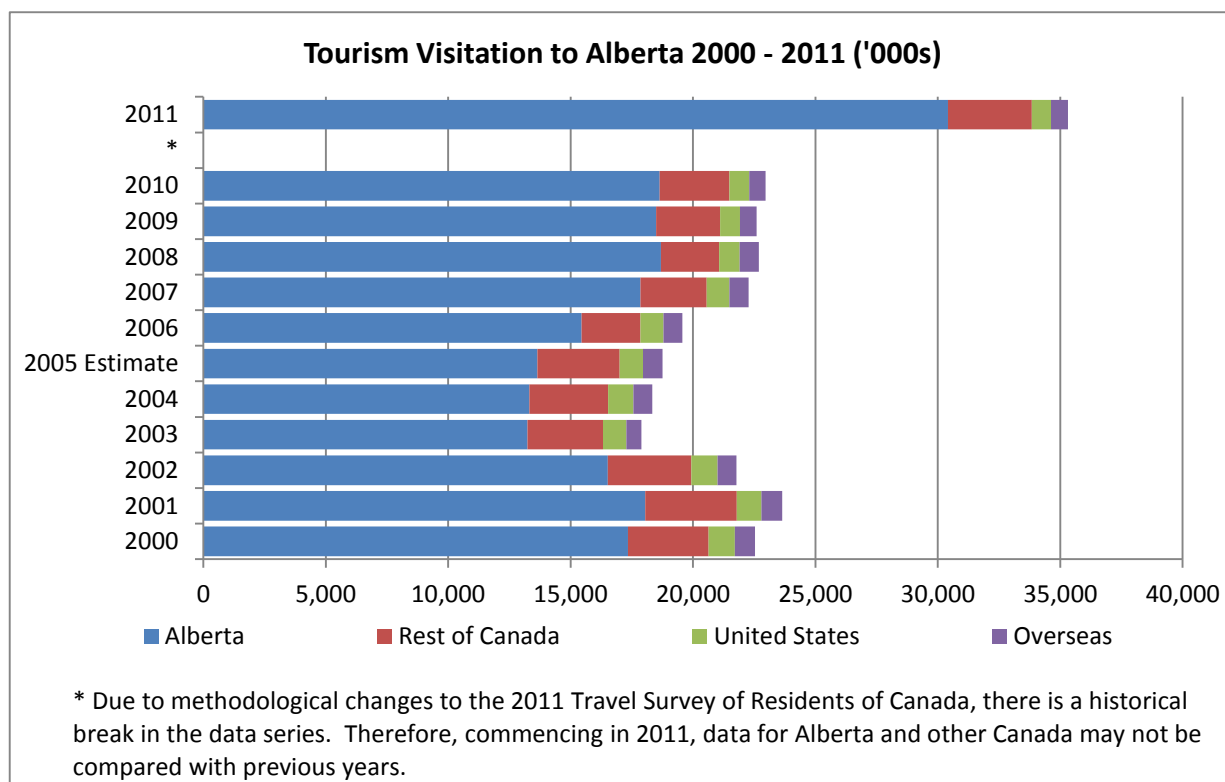
* Due to methodological changes to the 2011 Travel Survey of Residents of Canada, there is a historical break in the data series. Therefore, commencing in 2011, data for Alberta and Other Canada may not be compared with previous years.

Source: Statistics Canada, International Travel Survey, Travel Survey of Residents of Canada and Alberta Tourism, Parks and Recreation.

2.3.2 Visitation, 2000-2011

Visitation and expenditures in Alberta by market segment between 2000 and 2011 illustrate several points:

- Alberta visitation declined from 2000-2005 (-21%), then rose from 2006-2010 (+21%). In 2011, visitation by residents of Alberta was 30.4 million person visits.
- While “Rest of Canada” visitation grew marginally from 2000-2005 (+1.6%), it increased significantly from 2006-2010 (+18%). In 2011, visitation from the Rest of Canada was 3.4 million person visits.
- US visitation was down in both periods (-10% from 2000-2005 and -13% from 2006-2010). In 2011, visitation by residents of the United States was 775,000 person visits.
- Overseas visitation also declined in both periods (-4% between 2000 and 2005 and -12% from 2006-2010). In 2011, overseas visitation was 698,000 person visits.



Source: Statistics Canada, International Travel Survey, Travel Survey of Residents of Canada and Alberta Tourism, Parks and Recreation

During the decade to 2010, increased travel in our province by Albertans clearly offset visitation losses from other origin segments. Although 2010 visitation was 28% ahead of the low point in the decade, 2003, it had still not passed the visitation realized in 2001 by the end of the decade. Alberta's visitation trend mirrors that which Canada experienced during this turbulent decade.

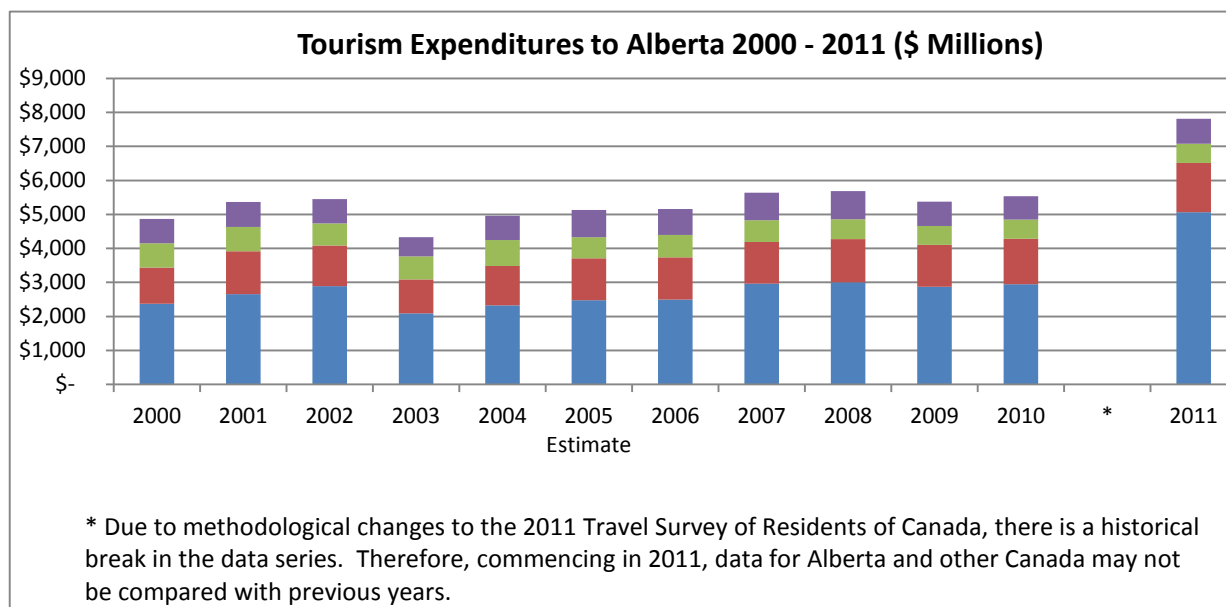
The 2011 data is not comparable, but rather will be the first year of a new data series.

2.3.3 Expenditures in Alberta, 2000-2011

Total expenditures peaked in 2008 at \$5.69 billion. The impact of the global financial crisis was felt after 2008, and in 2010, Alberta's tourism expenditures amounted to \$5.53 billion. Although not comparable to previous years, in 2011 total expenditures were over \$7.8 billion. Again, the pattern of individual markets is of interest:

- Expenditures by Albertans grew in both periods (+4% from 2000-2005 and +18% from 2006-2010); Albertans accounted for 65% of total tourism expenditures in 2011;
- Rest of Canada spending also increased in both periods (+16% from 2000 to 2005 and +8% from 2006-2010). They accounted for 19% of total tourism expenditures in 2011;

- For the US market, expenditures declined in both periods, (-13% from 2000-2005 and -15% from 2006-2010). Expenditures in 2010 were -26% below the decade high spending in 2004. They accounted for 7% of total tourism expenditures in 2011; and
- For overseas markets, spending was up +11% between 2000 and 2005 and down -9% from 2006-2010. The 2010 expenditures are about -6% under the decade average. They accounted for 9% of total tourism expenditures in 2011.



Source: Statistics Canada, International Travel Survey, Travel Survey of Residents of Canada and Alberta Tourism, Parks and Recreation.

Alberta's segmentation approach and our Tourism Framework will focus on attracting the highest spending segments of international and domestic markets. As a mature destination, our costs are higher than those of competitive destinations. We will focus on high quality products and experiences that obtain full value from markets comfortable with higher costs. We will focus effort on Alberta markets, near in markets and long haul markets based on individual market characteristics and the potential to increase yield.

Again, 2011 data is not comparable to prior years. Our Alberta and regional markets in 2011, comprising residents of Alberta, BC and Saskatchewan represented 94% of total visitation and 76% of total expenditures. These markets will receive significant attention in terms of research, product development planning and marketing.

2.3.4 Alberta has Maintained Market Share

Alberta's international market share, defined as our share of all Canadian province-visits by international travellers, has been maintained within a reasonable range over the past decade. This data set is prepared on a consistent base over the period 2000 – 2011.



Source: Statistics Canada, International Travel Survey, Travel Survey of Residents of Canada and Alberta Tourism, Parks and Recreation

Domestic market share is defined as the percentage of person-visits to Alberta relative to all provincial person visits (excluding trips made within the province of residence) by residents of a Canadian province.

Alberta was also been able to maintain our market share in our domestic markets over the decade from 2000-2011. Alberta realized 58-66.9% share of the BC market in terms of total visits to other provinces by BC residents. Alberta maintained 59.2-67.4% share of the Saskatchewan market over the decade, and we continue to hold at 6.4-8.5% of the Ontario market.

The importance of this result over the past decade is to underline that we have a strong industry, a strong and enduring market presence, and we continue to be a desirable destination among our target markets. We begin Alberta's Tourism Framework: 2013 – 2020 from a strong position and recent market indicators are uniformly pointing upwards and positive. It appears markets are coming back and Alberta still resonates for our target markets.

2.4 Competitive Assessment

A detailed assessment of Alberta's comparative and competitive advantages was conducted, a high level summary of which follows:

Alberta's Comparative and Competitive Advantage	
Comparative Advantage	Competitive Advantage
<p>Human Resources: A large, educated, young, and multi-national labour force with high participation rates and a strong work ethic.</p>	<p>Audit and Inventory: Alberta's new International Strategy will coordinate the efforts of government and industry to ensure Alberta remains one of the most competitive jurisdictions in the world.</p>

Alberta's Comparative and Competitive Advantage	
Comparative Advantage	Competitive Advantage
<p>Physical Resources: Scenic natural resources are abundant. Many of these resources are protected and presented within National Parks, which are the iconic global attractors in Alberta.</p>	<p>Maintenance: A free enterprise commitment, low taxation, cultural policies, investment in the arts, commitment of Tourism Levy investment, focus on air access, sustainability of parks and active recreation underline the maintenance commitment of Alberta.</p>
<p>Knowledge Resources: Alberta ranks with the world's best in terms of the quality of education. Higher education facilities, galleries, performing arts, culture organizations, and sport and event organizations represent ongoing commitments.</p>	<p>Growth and Development: In 2011, Alberta had the highest GDP per capita of any state or province in Canada and has led Canada in terms of economic growth of the last 20 years. Alberta's Land Use Framework provides a strong land management planning mechanism that will support recreation and tourism development.</p>
<p>Capital Resources: Alberta continues to lead the country in per capita investment, which in 2011 was \$23,641, more than double the national average of \$10,758.</p>	<p>Efficiency: Alberta has one of the most competitive business tax environments (25% combined) in North America. In 2011, labour productivity in Alberta's business sector was higher than in any other province.</p>
<p>Infrastructure and Tourism Superstructure: Five UNESCO sites, 480 provincial parks, 18 provincial historic sites, five national parks, two international airports, excellent highways and modern sports facilities, underline our advantage in this space.</p>	<p>Effectiveness: Alberta's attractive business climate has resulted in the province posting the second fastest growing small business sector in Canada over the last 10 years. Low personal taxes, low unemployment, highest median after tax income in Canada, high disposable income, and high spending characterize the Alberta advantage.</p>
<p>Historical and Cultural Resources: A network of heritage sites, events such as the Calgary Stampede, North America's largest Fringe festival, a renowned folk festival, small town experiences, and vibrant cultural facilities characterize our strengths.</p>	<p>Size of Economy: Alberta has led Canada in growth over the past 20 years, and has the highest small business starts over the past decade. Its entrepreneurial nature is a competitive advantage.</p>

Source: Alberta Tourism, Parks and Recreation, 2012

Alberta's major competitive tourism destinations are identified below:

- **British Columbia** is a competitor for some experiences and a partner in marketing Western Canada in long haul international tourism markets;
- **Northwest Border States:** Montana, Oregon, Idaho and northwest border states compete for US visitors;
- **Saskatchewan** competes with Alberta in some short haul markets;
- **Snowbird States and Mexico:** The snowbird states and Mexico draw Albertans to winter in these warmer climates; and

- **United States:** As the #1 ranked destination on most international travellers' list, the USA is a formidable competitor for tourism, especially since the launch of its Brand USA campaign in 2012. However, it is also a source of significant "two nation vacation" market demand for iconic destinations in Canada, attracting markets from long haul origins.

2.5 Trends and Influences

The major trends which the Framework should take into account are summarized following.

Tourism Trends and Their Impacts	
<i>Trend</i>	<i>Impact on Alberta</i>
Growing Global Demand for Travel	Alberta can work with CTC to attract a share of these markets to our iconic, international destinations and experiences.
Demand for Experiences	Increasingly our markets are looking for authentic, hands-on, unique and life-enriching experiences. Alberta can organize to provide customized experiences to niche markets.
Global Growth of Destinations	The international competitive environment has increased dramatically this decade, from international destinations to nearby BC destinations.
Demographics	From high income international travellers and retiring boomers, to Alberta's increasingly ethnically diverse population, opportunities to stimulate travel are abundant.
Alberta and Regional Projected Population Growth	Alberta is expected to grow from 3.7 million persons in 2011, to six million by 2050. The major growth is a significant tourism opportunity.
Labour Force Shortages	Alberta anticipates labour force shortages in other sectors, and this will impact the tourism labour force.
Technology Transformations	Personalization, virtualization, social media, peer ratings, viral campaigns, podcasting, geo-searching, and user-generated blogs will be pervasive.
Access	Competitive air access will remain a critical factor in Alberta's tourism development.
Economy	Canadian dollar value is a key factor in international travel to Canada and to Alberta. Industry focus on value for money must be constant.
Leakage	Alberta's family wealth has precipitated increased outbound travel.
Environment	Climate change has generated demand for eco-friendly destinations, products and operators.
Regional and Community Interest in Tourism as an Economic Driver	Regional and community interest in tourism has grown in Alberta, presenting and opportunity for inter-regional travel development.

Source: WMC Research, 2012

2.6 SWOT Analysis

Strengths and weaknesses mainly refer to matters inside the destination, ones we can act on.

Opportunities and threats are often, though not always, matters outside Alberta, and may be ones we cannot control or act on.

SWOT for Alberta: Strengths, Weaknesses, Opportunities and Threats for the Alberta Tourism Destination	
<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> ➤ National and Provincial Parks: Iconic, safe, secure destinations that are globally recognized – Banff, Jasper, others; trails and new experiences are being developed in Parks. ➤ Five UNESCO World Heritage Sites; diverse provincial historic sites and museums. ➤ Award winning brand has captured imagination and interest globally. ➤ High quality attractors and built environments. ➤ Vibrant, modern cities, quality transportation infrastructure and international airports. ➤ A mature, sophisticated, and entrepreneurial industry increasingly organized (DMOs, regions) to foster product and market development. ➤ Success in hosting international caliber events. ➤ Home of Westjet’s head office, a major air carrier with strategic alliances with international air carriers. ➤ Sustainable tourism framework – 4% Tourism Levy. ➤ No sales tax. ➤ Large Crown land resource with tourism potential. ➤ New immigrants to Alberta and other Canadians that have moved to the province create opportunities for tapping into the visiting friends and relatives market. 	<ul style="list-style-type: none"> ➤ National parks cannot grow further, and some tourism attractions and require enhancements. ➤ Some core products need redevelopment; need to meet market and export readiness standards. ➤ Canada is a high priced, mature tourism destination with no urgency – a value challenge. ➤ Lack of direct air service between Alberta and some priority markets. ➤ Technology divide among operators; some high tech savvy, but many have not embraced technology or are falling behind. ➤ Vacation/recreational homes investment leakage outside of the province. ➤ High seasonality. ➤ Complex industry a challenge to coordinate. ➤ Public sector challenges: coordination, public lands policy, cumbersome regulations, lack of coordinated infrastructure support, and lack of new destination development on Crown lands. ➤ Labour attraction/retention issues. ➤ Lack of a strong industry voice. ➤ Debt financing difficult for small/medium sized enterprises.
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> ➤ Create an efficient, effective destination and product development process on Crown lands. ➤ Select highest potential destination nodes and focus 	<ul style="list-style-type: none"> ➤ High Canadian dollar reduces inbound and increases outbound travel. Economic cycles/ exchange rates impact travel activity.

SWOT for Alberta: Strengths, Weaknesses, Opportunities and Threats for the Alberta Tourism Destination	
<p>development efforts on them.</p> <ul style="list-style-type: none"> ➤ Foster domestic and international niche product/experience development and marketing. ➤ Opportunity to increase meetings, convention, and incentive travel business in some destination areas, and to capitalize on crossover visits by growing MCIT/leisure trips. ➤ Foster strong tourism regions, integrated in planning, development and marketing with the provincial Framework. ➤ Foster sustainable tourism development. ➤ Support Canada on open skies; increase direct international air access. ➤ New entrepreneurs and workforce through immigration. ➤ New methodologies/technologies for providing information to visitors. ➤ Develop a coordinated research approach. ➤ Communicate value of tourism to key target audiences. ➤ Opportunity for tourism to become an important contributor toward diversification of the Alberta economy. ➤ Continued role for ministry in advocating for provincial and federal policy changes to support tourism. 	<ul style="list-style-type: none"> ➤ Liberalized air access and low fares elsewhere can make Alberta less competitive. ➤ Increased security, visa restrictions and requirements continue to impact inbound markets. ➤ Oil sands' negative image impacting Alberta's reputation nationally and internationally. ➤ Increasing oil and fuel prices would impact international visits. ➤ New and revitalized domestic and international destinations with immense investments, embracing sustainable tourism practices represent strong competitors. ➤ Brand USA marketing campaign targeting Canada, while CTC funding decline of \$14 million (20%) in 2013/14. ➤ Global climate change impacting tourism. ➤ New meetings technology impacting business travel. ➤ DMFs could make Alberta's accommodation less price competitive, even though the funds assist with regional marketing. ➤ Tourism is not always considered in policy and planning initiatives undertaken by other provincial and federal departments.

While the SWOT addresses the long list of factors we will consider in Framework development, this long list has been refined to draw out the key drivers of the Framework in a later section.

3.0 MARKETS, PRODUCTS, AND ALBERTA'S POTENTIAL

Alberta presently targets specific markets based on market research conducted by Alberta Tourism, Parks and Recreation and by the Canadian Tourism Commission. Our market-ready products are positioned by Travel Alberta in partnership with industry stakeholders.

3.1 Alberta's Target Markets

Alberta's target market opportunities and challenges are summarized as follows:

- **Alberta and Regional Markets (AB, BC, SK):** Together, Alberta, British Columbia and Saskatchewan tourists accounted for 94% of Alberta's total person-visits in 2011 and 76% of total tourism expenditures. There is strong repeat leisure-based visitation, VFR visits, personal business visits and business tourism from these markets. Awareness is high, so Travel Alberta's strategy is focused on product differentiation and consumer sales.
- **Ontario and Other Canada** accounted for only 2% of domestic person visits and 8% of domestic tourism expenditures in Alberta in 2011. Travel Alberta targets Free Spirits and Alberta has a 6.8% share of the Ontario market.
- **United States** visitors in 2011 accounted for 2% of visits, but 7% of expenditures and are a key market where Alberta has a 6.2% share. Low awareness is being addressed in the California market, and Free Spirits are the main target market. CTC marketing has been withdrawn from US markets, making Alberta's marketing efforts there even more important.
- **United Kingdom** Free Spirits have high awareness and interest in Alberta and in 2011, Alberta had an 18.6% share of the market.
- **German** Free Spirits and Cultural Explorers are targeted, and Alberta's market share was 17.6% in 2011.
- **Japan** (18.2% market share in 2011) requires awareness building to turn around its recent decline.
- **Australian** Free Spirits (18.4% market share in 2011) are approached with self-drive itineraries and advertising.
- The **Netherlands** remains a strong market (22.6% market share in 2011) for Alberta and its position in this market will be maintained.
- **Emerging markets**, similar to a number of the core markets already mentioned, are addressed in partnership with the CTC and include China, South Korea, India and Mexico.

3.2 Alberta's Tourism Product Mix

Alberta has a healthy mix of tourism attractions, experiences and services throughout the province. While hundreds of products and experiences are tracked by catalyst organizations, the following 13 clusters of product are positioned in our regional and international markets:

- Resorts;
- RV Camping;
- Specialty Lodging;
- Ag Tourism/Culinary Tourism;
- Event Tourism;
- Culture and Heritage Tourism;
- Special Attractions and Tours;
- Summer Outdoor Recreation/Adventure Tourism;
- Winter Outdoor Recreation/Adventure Tourism;
- Alberta Aboriginal Culture-based Activities;
- Alberta Authentic Arts and Crafts Product;
- Urban Experiences; and
- Trails.

A detailed SWOT has been prepared by ATPR team professionals for each product cluster.

3.3 Product Market Match

A competitive assessment of our product mix is key to matching our best products with the preferences of our target travellers. This is fundamental to successful marketing, but is also fundamental to successful destination development. Where gaps have been identified, ATPR and Travel Alberta will work together to help Alberta business and Alberta tourism clusters reach their market potential.

The tables that follow present the assessment of Alberta's 13 product clusters in four dimensions:

- **The Market Origin Dimension:** Regional, domestic and international markets are considered. Regional markets include Alberta, British Columbia, Saskatchewan and border state markets. Domestic markets include the rest of Canada. International markets refer to the USA and overseas origins.
- **The Product Supply Dimension:** In each region the strengths of our products is rated as primary, secondary, or emerging.
- **Market Demand Dimension:** Domestic and international market demand for our core product clusters is rated High (high demand) Medium (medium demand), or Low (emerging demand area). Boxes that are not filled indicate too little product available to rate.
- **The Tourism Region Dimension:** The six existing Alberta Tourism Regions have been rated separately in relation to product demand for the various clusters.

3.3.1 Alberta's Tourism Product Supply Strengths

Alberta is well recognized for its iconic tourism experiences located in the Canadian Rockies, and the supporting attractions, services and products. A number of reoccurring and one-time international cultural and sporting events have also allowed Alberta to develop its ability to host world-calibre events that attract visitors from around the globe. Our ability to serve visitors from within and outside of the province is also reflected in the fact that Alberta's food and beverage receipts are higher than other provinces and continue to grow.

While Alberta's operators supply an immense range of tourism experience and operate in every region of the province, not all our product is international, not all our product is iconic and not all our product is fully market or export ready. Our goal in product development is to ensure the products offered to our guests are high quality experiences delivered with Alberta's wholesome hospitality whether they are geared to domestic or international visitors. And we will capitalize on the opportunities.

Travel Alberta and Alberta Tourism, Parks and Recreation will be working to ensure we have the products and experiences that address the preferences of domestic and international markets, and capitalize upon on unique competitive advantages.

The chart following, prepared by Alberta Tourism, Parks and Recreation, assesses the relative supply strength in each region and across our product clusters.

Product Supply Strength						
Region	North	Edmonton	Central	Calgary	South	Rockies
Resorts	Emerging	Emerging	Secondary	Emerging	Emerging	Primary
RV Camping	Secondary	Secondary	Primary	Secondary	Secondary	Primary
Specialty Lodging	Emerging	Secondary	Secondary	Secondary	Primary	Primary
Ag Tourism/Culinary Tourism*	Emerging	Secondary	Secondary	Secondary	Emerging	Secondary
Event Tourism	Emerging	Primary	Secondary	Primary	Emerging	Secondary
Cultural and Heritage Tourism	Emerging	Secondary	Secondary	Secondary	Primary	Secondary
Special Attractions and Tours	Emerging	Primary	Secondary	Primary	Secondary	Primary
Summer Outdoor Recreation/Adventure Tourism	Primary	Secondary	Secondary	Primary	Secondary	Primary
Winter Outdoor Recreation/Adventure Tourism	Emerging	Emerging	Secondary	Primary	Emerging	Primary
Alberta Aboriginal Cultural- based Activities	Emerging	Secondary	Emerging	Secondary	Primary	Secondary
Alberta Authentic Arts & Crafts Product	Emerging	Emerging	Emerging	Emerging	Emerging	Emerging
Urban Experiences**	Emerging	Primary	Emerging	Primary	Emerging	Primary
Trails***	Secondary	Emerging	Emerging	Emerging	Secondary	Primary
Primary	*In Rockies, Culinary Tourism Only					
Secondary	**In Rockies, Banff Only					
Emerging	***In South, Primarily in the West					

This assessment will inform the catalyst organizations as to where support needs to be invested to bring product along to market readiness levels.

3.3.2 Demand for Alberta's Tourism Products

Demand for Alberta's tourism experiences was assessed for each tourism region and in terms of regional, domestic and international origin markets.

Regional Demand

As the table following illustrates, regional tourism demand (Alberta, British Columbia, Saskatchewan, and border States) is rated as moderate to high across most product clusters in all regions but northern Alberta. Among these five regions, areas of emerging demand are in resorts in Edmonton, Calgary and South, agriculture/culinary and event tourism in South, and emerging urban experiences in Central.

The North is strong in summer outdoor and trails, where there is high demand, and in RV Camping with moderate demand. All other tourism clusters are rated as emerging in this region.

Product Demand - Regional								
Product	Region	North	Edmonton	Central	Calgary	South	Rockies	
Resorts		●	●	●	●	●	●	
RV Camping		●	●	●	●	●	●	
Specialty Lodging		●	●	●	●	●	●	
Ag Tourism/Culinary Tourism*		●	●	●	●	●	●	
Event Tourism		●	●	●	●	●	●	
Cultural and Heritage Tourism		●	●	●	●	●	●	
Special Attractions and Tours		●	●	●	●	●	●	
Summer Outdoor Recreation/Adventure Tourism		●	●	●	●	●	●	
Winter Outdoor Recreation/Adventure Tourism		●	●	●	●	●	●	
Alberta Aboriginal Cultural-based Activities		●	●	●	●	●	●	
Alberta Authentic Arts & Crafts Product		●	●	●	●	●	●	
Urban Experiences***		●	●	●	●	●	●	
Trails****		●	●	●	●	●	●	
● High Demand		*In Rockies, Culinary Tourism Only						
● Moderate Demand		**In Calgary, Calgary Stampede						
● Emerging Demand		***In Rockies, Banff Only						
		****In South, Western Region Only						

Domestic Demand

The table following illustrates the strength of demand for the Canadian Rockies among domestic markets, with seven of the 13 clusters rated with high demand in that region.

The major cities, Edmonton and Calgary, rate high for special attractions and urban tourism, but overall the demand ratings for our cities are moderate across most clusters. This may represent opportunities for product development and marketing.

Product Demand - Domestic						
Region	North	Edmonton	Central	Calgary	South	Rockies
Resorts	●	●	●	●	●	●
RV Camping	●	●	●	●	●	●
Specialty Lodging	●	●	●	●	●	●
Ag Tourism/Culinary Tourism*		●	●	●		●
Event Tourism**	●	●	●	●	●	●
Cultural and Heritage Tourism	●	●	●	●	●	●
Special Attractions and Tours	●	●	●	●	●	●
Summer Outdoor Recreation/Adventure Tourism	●	●	●	●	●	●
Winter Outdoor Recreation/Adventure Tourism	●	●	●	●	●	●
Alberta Aboriginal Cultural- based Activities	●	●	●	●	●	●
Alberta Authentic Arts & Crafts Product	●	●	●	●	●	●
Urban Experiences***	●	●	●	●	●	●
Trails	●	●	●	●	●	●
● High Demand	* In Rockies, Culinary Tourism Only					
● Moderate Demand	**In Calgary, Calgary Stampede					
● Emerging Demand	***In Rockies, Banff Only					

South and Central regions see moderate to emerging demand across most clusters, the exceptions being trails and specialty lodging and cultural/heritage tourism in the south region. Again, opportunities for product development and marketing to attract domestic market are evident.

For domestic markets, the North is rated as an emerging opportunity in all but Adventure and RV Camping from the domestic market perspective. The ability to enhance domestic travel to the North may be viewed as medium to longer term opportunity.

International Demand

International demand is rated higher in the Rockies and Calgary than in any other region in Alberta, reflecting the iconic nature and long history of marketing the Canadian Rockies.

Product Demand - International						
Region	North	Edmonton	Central	Calgary	South	Rockies
Resorts	●	●	●	●	●	●
RV Camping	●	●	●	●	●	●
Specialty Lodging	●	●	●	●	●	●
Ag Tourism/Culinary Tourism*		●		●		●
Event Tourism**		●		●		●
Cultural and Heritage Tourism	●	●	●	●	●	●
Special Attractions and Tours	●	●	●	●	●	●
Summer Outdoor Recreation/Adventure Tourism	●	●	●	●	●	●
Winter Outdoor Recreation/Adventure Tourism	●	●	●	●	●	●
Alberta Aboriginal Cultural- based Activities	●	●	●	●	●	●
Alberta Authentic Arts & Crafts Product	●	●	●	●	●	●
Urban Experiences***		●		●		●
Trails					●	●

● High Demand	*In Rockies, Culinary Tourism only
● Moderate Demand	**In Calgary, Calgary Stampede
● Emerging Demand	***In Rockies, Banff Only

High international demand for South regional Aboriginal Culture and Authentic Art/Craft Experiences is notable, reflecting international interest in the plains First Peoples tradition.

Edmonton is rated high in demand only for specialty attractions and tours and for urban experiences, indicating there is opportunity to grow international tourism to Alberta's capital city.

The Central region is emerging across most clusters and moderate in some, as is the North.

A detailed product-match will be completed for each region and will be used in the implementation phase of Alberta's Tourism Framework.

4.0 Alberta's Tourism Framework

4.1 Drivers of the Framework

- **Research-Based Framework:** Strategic planning and decision making will be based on quality research, identification of measurement metrics, and the evaluation of measurable results in tourism marketing and product development.
- **Alignment:** We need to align efforts in marketing, product/experience development and industry development. Competition for Alberta, regional, domestic and international markets is fierce, and requires collective focus on highest priority market segments.
- **Destination Accessibility:** Air and highway access and visa issues internationally are key barriers to tourism growth. Competition is severe in relation to securing international air services. Strategic highway upgrading and development, quality and affordable tourism highway signing and way-finding, and innovative visitor services mechanisms are needed, particularly in relation to the level of rubber tire travel by Albertans and other Canadians within the province.
- **Market Transformation and Competitive Environment:** The evolution of our markets from destination selection approaches to experience selection is a key driver of the Framework. Our focus on Free Spirits and Cultural Explorers internationally drives our marketing activities in that realm. However, we need to continue and enhance our understanding of traveller and market motivations within our very important provincial, regional and domestic markets. We need to offer innovative tourism experiences in these markets just as we do internationally. We will succeed by tailoring innovative and collaborative approaches in both these important source markets.
- **Product/Experience Development and Investment:** The need for targeted support to expand Alberta's supply of tourism experiences and destinations:
 - Our National Parks must be enhanced as tourism destinations. Products must be upgraded, existing attractions and properties modernized, and trails and other tourism offerings developed to maintain the iconic status of the core attractors for Alberta.
 - Our Provincial Parks also have the ability to, in a balanced and sustainable manner, showcase pristine landscapes, cultural heritage, recreation/active living and authentic tourism experiences.
 - New sustainable experiences within mountain parks, new attractions/experiences near water, mountains or significant natural attractors, and other Alberta regions and tourism experiences must be developed.
 - Market readiness within industry must be improved – use of technology, increased marketing spending and operational quality need to improve; education and training are required.
 - Some industry operators, products require quality improvement.
 - Research-based identification of opportunities is needed.

- Some regions lack capacity and need organizational and planning assistance.
- Access to capital to refresh existing product/destinations and support new development.
- **Public Land Access:** The need for access to and development and use of Crown lands with high tourism potential and recreation value is critical.
- **Alberta's Land Use Framework:** The LUF presents opportunities for tourism plans, destination areas and initiatives to be recognized in the broader planning and development framework in the province.
- **Whole of Government Support:** Alberta cannot accomplish its ends of the Tourism Framework without whole of government support. The Alberta Tourism Framework affects all Albertans, and to execute the Framework will require commitment and concerted effort from the Government of Alberta, from local government, and from the federal government.
- **New Destinations:** Our mature iconic National Park destinations are capped in terms of commercial growth, and we face strong competition from new, high quality destinations; there is an urgent need for new destination development in Alberta and outside the mountain national parks. Our provincial parks may also be able to showcase pristine landscapes, cultural- heritage resources, recreation/active living and authentic tourism experiences, thereby contributing to new destination areas:
 - Leakage to BC and US snowbird destinations by Albertans is significant;
 - Crown land access for tourism destination development, and identified opportunity nodes must be in place;
 - Research-based identification of the product/market match for destination development is needed; and
 - The need to improve infrastructure support for the tourism industry to foster development is critical.
- **Collaborative Tourism Initiative:** The need to integrate collaborative initiatives into our Alberta Tourism Framework will increase once the provincial Framework is approved.

Collaborative Tourism Initiatives, focused on coordinating, planning, development, marketing and investment at the regional or sectoral level, will be piloted. A new Collaborative Tourism Initiative is underway in the Canadian Badlands region and a culinary tourism (sectoral) initiative has been launched. Other regions and sectors with tourism opportunities will be considered as government support for destination management expands. Tourism opportunities identified with the Land Use Framework regions will also be considered.

Collaborative Tourism Initiatives are needed to address and overcome issues such as:

- Marketing at the regional, community and local levels is often not aligned with Alberta's brand or key messages.

- Understanding that destination areas are what is marketed, not necessarily regions, is core to successful regional product development and marketing.
- Labour force attraction and retention issues prevail and are urgent in some regions.
- Community tourism awareness is low in some regions of the province.
- Some tourism products and experiences are below market standards; education, training, product improvement, market awareness and access support is needed.
- Some areas lack the resources to effectively market.
- Rural tourism development efforts are in early stages, and Collaborative Tourism Initiatives may be a conduit for product improvement, improved marketing sophistication and spending by private sector. Such initiatives will also improve alignment with Alberta's marketing strategies. Destination management approaches and discipline will be an effective framework for such initiatives. Regional initiatives specifically linked to the Alberta Tourism Framework are anticipated to be a key outcome of the Collaborative Tourism Initiative approach.

4.2 Vision and Goals of Alberta's Tourism Framework

4.2.1 Vision

Innovative leadership, a flourishing unified industry, traveller-focused authentic experiences, creating prosperity in Alberta.

4.2.2 Guiding Principles

Core principles, shared by all stakeholders, underlie Alberta's Tourism Framework:

- **Collaboration:** We succeed through collaboration and partnerships of all key catalyst organizations and the participation of tourism industry regions and stakeholders; through a network of government partners, whole of government support for sustainable tourism development is in place. Strong, open working relations between government and industry are a hallmark of Alberta's tourism system.
- **Traveller-focused:** Tourism development and marketing is focused on creating transformational experiences for the traveller – the only true customer in the tourism system.
- **Integrated Destination Management:** An integrated destination management approach guides tourism development, investment and marketing, growing a world calibre destination in carefully planned steps.
- **Research-based Decisions:** High quality research informs destination decision-making, identification of measurement metrics, and evaluation of results in tourism marketing and development.

- **Tourism Innovation and Excellence:** Authentic, innovative Alberta tourism experiences, services, and hospitality, reflecting our unique culture and landscapes, are all recognized eventually as world class by our markets.
- **Accountable and Transparent:** Stakeholder organizations are individually, collectively and transparently accountable for the on-time delivery of the Framework, measurement of results, evaluation and realignment of actions.
- **Triple Bottom Line Contribution:** Tourism is an important contributor to a sustainable Alberta, and all tourism regions and their communities benefit economically, socially and environmentally from tourism.

4.2.3 Alberta's Tourism Goal

Tourism in Alberta is a \$10.3 billion industry by 2020, providing sustainable economic benefits to all regions of Alberta.

Accomplishing our goal by 2020 will mean we need to work aggressively together to accomplish an average annual growth rate of 3% over the period 2012-2020.

4.3 Assumptions of the Framework

- **Whole of Government Support:** It is assumed that this Framework is supported by the Government of Alberta, and local and federal governments assist where appropriate going forward.
- **Whole of Industry Approach:** Enhanced regional tourism delivery through collaborative tourism initiatives.
- **Economic growth** in Alberta continues for the coming decade and more, as projected in longer term forecasts.
- **The Canadian dollar** remains substantially at par with the US dollar over the period.
- **Major global shocks** in the next decade do not impact the tourism system in Alberta so severely that they undermine our ability to grow as planned.
- **Canadian Tourism Commission** budgets are substantially restored so our international marketing partner can effectively compete in our origin markets.
- **The Tourism Levy** continues to provide substantial, sustainable funding, helping to accomplish tourism development and marketing key objectives.
- **Major air carriers** continue to operate from Alberta's airports through the period.

4.4 Priorities of Alberta's Tourism Framework

Priorities focus our attention on those few things which, if done correctly and at the right time, will move us forward dramatically. Priorities focus the finite energy and resources of the organization (destination) on those issues/priorities *most critical to the organization's success*.

Five priorities will drive Alberta's Tourism Framework forward to 2020. All priorities are linked and are critical to success. While priorities are numbered for convenience, this is not indicative of order or importance. All the priorities are important to success and all will be addressed in the course of executing this Framework.

PRIORITY #1: INNOVATION AND DEVELOPMENT: Alberta actively encourages entrepreneurial investment in traveller-focused development of innovative tourism experiences, destination renewal, and new destination areas.

PRIORITY #2: ACCESSIBILITY: Access to Alberta and its tourism regions improves.

PRIORITY #3: MARKETING: Grow tourism revenues by directing the Alberta tourism brand at high potential markets. We will lead with authentic experiences in breathtaking landscapes that drive visitation throughout the province.

PRIORITY #4: ALIGNMENT: Industry organizations actively align and transparently communicate their efforts in pursuit of our common goals.

PRIORITY #5: RESEARCH: A comprehensive, results based research approach drives decisions.

Key objectives are statements of the specific outcomes Alberta wishes to achieve relative to the key drivers of the Framework. They represent **what** Alberta as a destination wishes to accomplish and are written in specific enough terms to be measurable. Key objectives are usually developed by considering where the destination is now relative the strategic priority and where it would like to be at some definable time in the future.

Priority #1: INNOVATION AND DEVELOPMENT

INNOVATION AND DEVELOPMENT: Alberta actively encourages entrepreneurial investment in traveller-focused development of innovative tourism experiences, destination renewal, and new destination areas.

Key Objectives:

1.1: Access to public land for tourism development is improved and streamlined.

A number of potential tourism development areas on Crown lands have already been identified. Market and product research will assist in identifying additional Crown land areas that are highly suitable for tourism experience development. The Government of Alberta will be encouraged to formally identify existing and new, high priority areas for tourism development on Crown lands, in collaboration with other

stakeholders and in support of regional planning occurring under the Land Use Framework. It will also put in place streamlined and complementary policies supportive of tourism development on Crown land.

Outcome Measures: The number of new tourism business and destination development opportunities identified for development on Crown land. Expansion and growth of existing tourism businesses located in Crown land areas are increased, and the number of incremental visitors to those businesses and destination developments, and the spending of those visitors are also increased.

1.2: Destination development areas are identified and planning and approval processes for tourism development are in place.

A limited number of new, or enhancement of, existing major tourism destination development opportunities will be identified based on careful research of traveller experience interests. The Government of Alberta will identify these specific areas and will align approval processes, infrastructure support, marketing support approaches and other elements to stimulate private sector development in these areas.

Within existing high potential areas for tourism enhancement, as identified by research, tourism partners will create new or highly enhanced experiences for the traveller using multiple operators; experiences will be packaged for sale through Canadian receptive operators and major tourism operators in overseas markets and for independent travellers from regional, domestic and US markets. Where Alberta tourism operators need to enhance their product to achieve market readiness levels, tourism partners will facilitate training, education, product upgrades and support systems upgrades. They will also provide advice to bring that product to a level where it can participate in packages.

Outcome Measures: A number of high priority destination areas have been identified for creation.

1.3: Support for priority tourism development areas is enabled through collaboration at all levels of government by 2015.

A key enabler of physical development of tourism opportunities is the provision of infrastructure. Alberta's tourism partners will work with all three levels of government to remove barriers and enable public and private sector infrastructure development to those specific destination areas and nodes that are identified as high potential tourism development areas.

Outcome Measures: New development, new tourism operations, visitation, incremental spending, economic impact, and taxation impact to Alberta.

1.4: Tourism experience gaps and weaknesses are identified, research addresses specific market needs, and new and enhanced tourism products and experiences are provided for the traveller.

Industry partners within destination areas and nodes will work together to conduct research. They will identify a range of market needs, consider best practices, address product and experience gaps or weaknesses, and address improvements to tourism experience offerings to enhance regional tourism. They will assist operators to obtain support to upgrade their business and advise new operators on startup

support. Partners will support Collaborative Tourism Initiatives to prepare and deliver high quality marketing that is aligned with our provincial marketing messages.

Outcome Measures: Number of new packages and their market reach, incremental visitation, tourism spending, regional and Alberta-wide economic impact and industry satisfaction levels.

1.5: Industry has improved access to capital investment for tourism development by 2015.

Tourism partners will work with tourism investors, financial organizations, governments and tourism operators to address key issues, determine changes required, and develop programs or initiatives to address those changes.

Outcome Measures: Operators have timely and ready access to capital and tourism operators' satisfaction improves. Expansion to existing and development of new tourism businesses occurs.

Priority #2: ACCESSIBILITY

ACCESSIBILITY: Access to Alberta and its tourism regions improves.

Key Objectives:

2.1: Increase air access to and within Alberta from priority target markets to grow inbound travel annually.

Tourism, Parks and Recreation will continue to lead provincial air access initiatives to facilitate the growth of direct air service from international, domestic and regional markets. This will include the creation of a provincial Air Access Framework to inform collaborative efforts involving Travel Alberta, airport authorities, government, and industry stakeholders to bring more travellers to Alberta.

Alberta will continue to lead discussions around air access at the Council of Canadian Tourism Ministers meetings regarding priorities for liberalized and Open Skies air service agreements, and coordinate input from other provinces to inform the federal government's annual calendar of negotiating priorities for air service agreements.

Tourism, Parks and Recreation will also undertake advocacy initiatives to encourage federal government policy reforms that will make Canada's aviation system more cost competitive (i.e., airport rents, air traveller fees), thereby enhancing the appeal of Alberta as a destination for both international air carriers and travellers.

Visa challenges will be brought to the attention of the federal government through provincially-led strategies and initiatives regarding air service development, including movement of travellers from emerging markets such as India, Mexico and China. It will also advocate on behalf of provincial stakeholders on visa issues through the Canadian Council of Tourism Ministers.

Outcome Measures: Regulatory change, expanded seating from targeted regions, increased inbound leisure or business travel, number of incremental visitors, visitor spending, economic impact and taxation impact.

2.2: A robust, consistent, and affordable highway signing and wayfinding system for tourism regions and experiences is fully functioning.

Alberta's highway signing and wayfinding system is in place; however, there is an opportunity for further enhancements to incorporate directional, wayfinding and marketing functions. A system of themed regional signing, wayfinding, and visitor services signing is desirable within each tourism region.

Outcome Measures: The number of communities and operators that purchase signs and the number of "complete" wayfinding systems in regions or along trails.

2.3: Well-coordinated, convenient, relevant and innovative multi-channel visitor information services engage and encourage visitors through every stage of their travel journey by 2014.

Tourism partners will continuously address research-based, innovative solutions to the provision of relevant information to the traveller while they are at home, on business, en route, or within the destination. Social media, mobile applications, auto-based navigation enhancements, real time Web connections, and visitor "destination centres", all of which are currently being addressed, will be enhanced, and operators will be offered opportunities to participate.

Operator training and upgrading to bring more technical capacity and currency is critical, and tourism partners will provide reference and recommendations for access to training resources through the Collaborative Tourism Initiatives.

Outcome Measures: Visitor use of information technologies, use of a variety of channels, suggestive selling success measures, incremental spend and economic impact.

2.4: The tourism industry has access to a motivated, educated/trained, skilled and professional tourism labour force.

Alberta Tourism, Parks and Recreation will collaborate with other relevant provincial departments (Alberta Human Services, Alberta Education, Alberta Enterprise and Advanced Education), educational institutions and tourism industry organizations to develop strategic initiatives to address the labour force needs of the tourism industry, including opportunities to attract and retain a range of skilled and semi-skilled domestic and foreign workers. It will include initiatives to educate tourism industry stakeholders on effective labour force attraction and retention practices, and support for provincial and federal programs that facilitate training and recruitment of labor for the tourism industry.

Outcome Measures: Growing usage level of labor force related programs/services, industry satisfaction ratings and employment levels.

Priority #3: MARKETING

MARKETING: Grow tourism revenues by directing the Alberta tourism brand at high potential markets. We will lead with authentic experiences in breathtaking landscapes that drive visitation throughout the province.

** for further information, please refer to the current Travel Alberta's annual business strategy publication.*

Key Objectives:

3.1: Alberta's tourism brand awareness and marketing efforts are effective in international and domestic markets.

Travel Alberta has identified the following markets as high-yield opportunities: Alberta and Canada, the United States, the United Kingdom, Germany, China, Japan, South Korea, Australia, the Netherlands, India and Mexico.

International market investments will focus on Alberta's highest value customers – those who stay the longest and spend the most. In primary markets, enhanced consumer marketing, travel trade, media, and public relations will be used. In secondary markets (Mexico, India and South Korea), focus will be on travel trade and media support along with digital marketing channels.

In domestic markets, efforts to increase awareness and visitation to lesser-known or new Alberta travel experiences will be the focus. In long-haul Canadian markets, consumer, media and public relations activities will be increased. In most markets, as applicable, social media activity will be increased. This will create multiple points of integration across channels in which to engage travellers.

Alberta will immediately act to offset the CTC's decreasing investment in international origin markets. Where the CTC has left a market completely, Alberta will decide if it will remain. Non-traditional marketing partners and partnerships with other provinces (Canada's West) will be enhanced in specific core markets.

Access to markets is critical. Partners will work with domestic and international airlines to increase flights and seats to Calgary and Edmonton. Efforts to equalize rates for long haul travellers that hub through other cities, already under way, will be expanded. Pan European routings with specific airlines will also be enhanced.

Increasing tourism experiences in all regions and making them available to target markets is a key strategy to reach the revenue target. Partners will work at the regional level to improve operator experiences and grow market interest.

3.2: Revenue generating capabilities of industry partners are increased.

Travel Alberta will increase industry operator support through cooperative funding, marketing campaign participation opportunities and improved marketing tools to help Alberta tourism operators drive revenue. Operator support for consumer campaigns, marketing activities targeting geographic markets and multiple communications efforts will be enhanced.

Alberta businesses will have access to enhanced travel trade/tour operator campaigns and consumer marketing campaigns. Provided market criteria and competitive requirements have been met, meetings, conventions and incentive travel (MCIT) marketing efforts will be increased, and crossover leisure/tourism visits will be supported.

The Alberta Tourism Information Service – a complimentary marketing and product distribution service provided to Alberta tourism operators to promote their businesses on Travel Alberta and tourism marketing partner's digital marketing channels – will be a central marketing channel for all Alberta tourism operators.

Travel Alberta will work with ATPR and through Collaborative Tourism Initiatives to support the growth and development of Alberta's industry marketing capabilities through a variety of learning and development offerings.

3.3: Drive destination competitiveness through industry partner collaboration.

Traveller-focused product (tourism experience) development efforts, effective and consistent marketing execution, and collaboration will enhance our ability to generate consumer interest in travel to Alberta.

Industry partners – Alberta Tourism, Parks and Recreation; Travel Alberta; Destination Marketing Organizations; Collaborative Tourism Initiatives; Alberta Hotel and Lodging Association; and marketing partners such as the Canadian Tourism Commission – will work together to support research-based, traveller-focused tourism experience development and marketing.

Alberta has many destination areas and a broad variety of tourism experiences to offer the traveller from distant origins and from Alberta. Tourism experience development will focus on providing the right experience for each specific target market.

3.4: Marketing and development strategies, prepared with Collaborative Tourism Initiatives and integrated within Alberta's Tourism Framework, are being executed.

Alberta Tourism, Parks and Recreation and Travel Alberta will work with the pilot Collaborative Tourism Initiatives to prepare traveller-focused tourism development and marketing strategies. Alberta, regional close-in, domestic, and international markets will be considered, and tourism destination areas within each Collaborative Tourism Initiative area will be identified, gaps assessed, and actions planned.

Coordinated support for traveller-focused tourism experience development, packaging and marketing will be determined and executed.

Outcome Measures: Completion of strategies integrated with Alberta's Framework. Action against strategies, measurement of success of those actions, and the resultant increased tourism revenue attributable to new and upgraded experiences and marketing are measures of success.

Priority #4: ALIGNMENT

ALIGNMENT: Industry organizations actively align and transparently communicate their efforts in pursuit of our common goals.

Key Objectives:

4.1: Piloted Collaborative Tourism Initiatives prepare regional and sectoral destination management plans that are aligned and integrated with Alberta's Tourism Framework and are being executed.

Piloted Collaborative Tourism Initiatives will focus on preparing effective tourism development, marketing and management strategies that integrate within Alberta's Tourism Framework. They will be assisted by resources from Alberta Tourism, Parks and Recreation and from Travel Alberta. Plans will identify gaps and areas for improvement, outcome measures, and implementation actions that will increase market ready tourism experiences in the piloted region and sector grouping

Initial plans will be prepared for the Canadian Badlands region and for the culinary tourism industry working with the Alberta Culinary Tourism Alliance. This work may be followed by additional strategic planning in other regions and other sectors. Ongoing evaluations will identify best practices and inform future Collaborative Tourism Initiatives.

Outcome Measures: The piloted Collaborative Tourism Initiative strategies address key issues and opportunities and are being executed; innovative new tourism experiences are created and travellers buy them; industry satisfaction increases.

4.2: Major catalyst organizations (Alberta Tourism, Parks and Recreation and Travel Alberta) execute a coordinated approach to the access and delivery of tourism development and marketing services.

Travel Alberta and Alberta Tourism, Parks and Recreation will work together to create a provincial information resource and centre of excellence for access to support resources and programs across Alberta. A coordinated approach to obtaining support through telephone or Web resources will be supported by a comprehensive database of programs, organizations, educational institutions, online resources and services whether offered by educators, federal or provincial governments, organizations such as Community Futures, Business Link or any other organizations that can assist industry. The coordinated approach may be accessed by individuals, tourism operators, business startups, potential investors, communities, non-profit organizations, Collaborative Tourism Initiatives and other organizations regardless of how they are involved in tourism.

The concept of the “Coordinated Tourism Approach” will be refined, and it will be tested through industry consultation before a final approach is determined.

Outcome Measures: A coordinated resource centre is established. Resources will be coordinated toward initiatives according to the needs of industry. Use of the centre grows continuously against targeted numbers. Satisfaction of centre users is high.

4.3: Federal, provincial and local government policies are better aligned with tourism priorities.

The need for improved alignment of government policies and programs has been expressed by industry and government for many years. This approach will seek to take major strides in the direction of coordination of services.

Alberta Tourism, Parks and Recreation will prepare an inventory, assessment and case studies of government policies and programs impacting tourism. Key issues will be identified through industry and investor input.

A forum of key government and industry stakeholders will be held with the goal of better aligning and coordinating policies and programs; focus will be placed on priority areas identified for tourism development or growth. In the future, this forum could be held annually or semi-annually to ensure improvements continue.

Outcome Measures: Key issues are identified, organization satisfaction with alignment improves, and client satisfaction measures improve.

4.4: Recognition, understanding and support of tourism as a major contributor to the Alberta economy increases within government, communities, and among Albertans.

Alberta Tourism, Parks and Recreation will lead in collaboration with other key stakeholders and will prepare and execute a communications campaign to raise awareness of and support for the importance of tourism in Alberta.

The campaign will address information to key audiences at the local, regional and provincial levels and will address the importance of tourism to other industries in Alberta based on tourism satellite account research and other sources.

Outcome Measures: Growth in awareness, understanding and support among key target audiences as compared with benchmarks will measure success.

Priority #5: RESEARCH

RESEARCH: A comprehensive, science-based research approach drives decisions.

Key Objectives:

5.1: A government-led research funding model prioritizes research and funds and manages delivery of high quality core, performance, and forward-looking tourism research.

To compete in the global arena, Alberta's tourism industry needs access to timely, accurate, forward-looking data and knowledge. This key result is an opportunity for all tourism partners to work together and create a more effective response to a complex world.

A **Tourism Research Partners Forum** will bring stakeholders together to identify and pursue collaborative research opportunities in 2014. This forum will prioritize collaborative research requirements and the partnered funding of core, performance research and forward-looking information led by Alberta Tourism, Parks and Recreation.

A research framework and implementation plan will follow this forum, receive approval of the tourism partners and be executed by the appropriate agencies.

Outcome Measures: Annually joint research initiatives are created; research is conducted and shared with industry.

5.2: Tourism organizations access innovative dashboard data on current, comparative and historic tourism performance.

Tourism regions lack timely, ongoing comparative data that helps business and regional leadership make decisions. This data will be identified and organized in a dashboard presentation format for each region. Anticipated inputs include regional occupancy, average room rate, revenue per available room, attractions attendance, event attendance, parks attendance and other indicators of tourism.

Cooperation of all regions, the hotel organizations in those regions, and government departments is assumed and will be required for this outcome.

Outcome Measures: A dashboard system is in place; regional organizations are highly satisfied with the dashboard indicators and use the dashboard approach. Demand for more indicators grows.

5.3: Research on desired tourism experiences for international and domestic target markets informs tourism experience development.

The research forum will identify priority research on tourism experiences. Regional Framework development will identify gaps in tourism experiences at the regional level and will explore the potential.

This work will address, through detailed research, the "experience sought" by our key target markets from Alberta, regional, domestic, US and overseas markets and focus on the key psychographic segments with which we are successful. Each region will be addressed in terms of its destination area strengths and

weaknesses. Tourism experiences involving multiple operators will be addressed and described, and those that lend themselves to packaging will be identified.

This research will be used province-wide and by specific regions to inform their product development initiatives.

Outcome Measures: Successful products and packages are developed. Incremental visitation occurs. Tourism investment and expenditure occurs within each region. Regional and province-wide economic impacts are measured.

5.4: Comprehensive measures of performance and visitor satisfaction informs industry and key target audiences of the value of tourism.

Reliable measures of the state of tourism, provided to industry and government in a timely fashion, is a key desire of all tourism destinations. Some common measures and indicators include:

- Airport traffic indicators;
- Highway traffic indicators;
- Border crossing volumes;
- Parks visitation;
- Attractions visitation by origin;
- Event attendance by origin;
- Accommodation average occupancy, average room rate, revenue per available room, seasonality indicators and market segment growth; and
- Domestic product contribution, industry-wide data.

Outcome Measures: Enhanced and innovative measures of tourism performance and visitor satisfaction are developed, tested, applied and reported on a regular basis to the tourism industry and to Albertans.

4.5 Risk Assessment

The major risks to the success of the Framework are categorized and described as follows:

- **Geo-Political Risks:** Wars, terrorism, religious upheaval, the closing of embassies, the reputation of our oil industry and related risks may impact travel to Alberta. In most cases Alberta can do little about these situations. Provided Canada and Alberta remain safe, secure destinations that support diversity the impact of such events can be mitigated.

- **Global Financial Risks:** The global financial crisis of 2008-2012 affected travel from many of our origin markets. Some of them have not yet fully recovered. A repeat of global financial uncertainty will impact travel to Alberta and may impact travel by Albertans.
- **Economic Risks:** Alberta's prosperity relies on the shipment of exports, mostly energy, to the world. If this ability to export is curtailed, whether because of access bottlenecks or by policy against oil sands, or by pricing of competitive energy, Alberta will suffer economically. This will impact our Alberta markets through lower average disposable income, and will impact our national and international markets.
- A **high value Canadian dollar** impacts our export potential. In tourism, Alberta becomes more expensive for other nationals, while Albertans find it more affordable to travel outbound to other countries.
- **Environmental Risks:** Environmental catastrophes in our target countries can impact travel. Japanese travel after the tsunami and nuclear reactor issue is an example. The limiting of air travel in Europe resulting from a volcanic eruption in Iceland is another. In Alberta, the image of our oil sands is a potential threat to tourism.
- **Competitive Risks:** Destinations around the globe compete for Albertans, with the highest family disposable income in Canada. British Columbia attracts Albertans with water contact vacations, four season resorts and real estate purchase potential.
- **Regional economic agreements** creating trade zones that include travel are a larger example in the competitive environment, making it easier for residents within the trade zone to travel internally than externally. If tourism becomes more "regional", Alberta's opportunities will be more limited.
- **Country Competition:** Countries are becoming more competitive. The United States recently launched its first nationwide tourism marketing campaign in three decades, and it is targeting Americans with "in America" travel experiences, as well as Canadians, to visit their neighbours. This is a significant competitive threat.

4.6 Implementation of Alberta's Tourism Framework: 2013-2020

Detailed tactical planning will be undertaken in 2013. Detailed tactical plans will be assessed in terms of time and resource requirements, and an implementation plan and process chart will be prepared.

4.6.1 Monitoring

Until detailed tactical planning, timing, resource requirements and the relationships between tactics are determined the monitoring and evaluation programs cannot be established.

The progress of all key objectives in Alberta's Tourism Framework will be monitored against planned timing of task requirements. Open reporting to industry will occur on a regular basis.

4.6.2 Evaluation

The accomplishments under each key result and the strategies and tasks identified under each key result will be evaluated against the outcome measures identified on the timeline suggested in detailed tactical plans. Travel Alberta and Alberta Tourism, Parks and Recreation will be measured in terms of these accomplishments.