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# ALBERTA TOURISM COMMUNITIES BENCHMARKING AND COMPETITIVENESS REVIEW



Headwater Group

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## EXECUTIVE SUMMARY

### A. Purpose:

This work was sponsored by the Towns of Banff and Canmore and the Municipality of Jasper in their efforts to better understand three tourism community related questions:

1. What unique municipal service demands do tourism communities support?
2. How can tourism communities be enabled to address their unique service demands?
3. How to define a tourism community for policy response?

### B. Approaches:

#### 1. What unique municipal service demands do tourism communities support?

An on-line survey was developed to compare infrastructure, marketing and program expenditures of the tourism communities of Jasper, Banff and Canmore against comparable sized communities in Alberta. Expenditures were benchmarked by municipal service asset and function and compared on a per capita basis. Understanding expenditure differences helps clarify the incremental revenue needs to maintain a tourism community.

#### 2. How can tourism communities be enabled to address their unique service demands?

Alberta's tourism destination competitors, the United States and British Columbia, were reviewed to identify what revenue tools they use. Identifying revenue tools used to finance community service demands and enhance competitiveness will provide future options for consideration.

#### 3. How to define a tourism community for policy response?

A review of municipal service characteristics was undertaken to identify how communities with a core tourism focus could be distinguished. Identifying tourism communities will enable support programs and policy makers to prioritize communities that host and have made an investment to develop as a tourist destination.

### C. Findings:

#### 1. What unique municipal service demands do tourism communities support?

**Waste Water Services** –Waste Water Treatment Capacity is over 100% greater than non-tourism community capacity and Average Peak Demand is 60% higher

**Water Service Supply** – Water Service Peak and Average Daily Demand is over 60% higher than non-tourism communities

**Transit Services** - Tourism communities provide transit service hours to support visitors and enable workers to access work places. Public Transit Services are only provided in Banff and Canmore, spending \$71.52 per capita on transit.

**Marketing Services** – Communities have designated (tax and licensing) revenues and voluntary (i.e. hotel levy) methods of securing revenue to support designated marketing organizations (DMOs) or similar Chambers of Commerce to promote the community. There is significant designated licensing revenue that supports Banff and Canmore DMOs.

**Housing** - Affordable Housing is not a service demanded for visitors, it is needed to support lower income workers and provide employee housing for the busy winter and summer seasons. Banff and Canmore's Affordable Housing portfolio totals over \$1,800 per capita.

**Parking Services** - Tourism communities have more than three and a half times the number of off-street parking stalls per capita than non-tourism communities. There is approximately one off-street parking stall for every 130 residents in tourism communities.

## **2. How can tourism communities be enabled to address their unique service demands?**

Three revenue tools are identified to enable tourism communities to raise revenue:

- Tourism Consumption Levy – introducing a value-added tax on tourist service consumption
- Real Estate Transfer Levy – introducing a levy on recreational property sales
- Provincial Revenue Sharing – visitor based population funding

## **3. How to define a tourism community for policy response?**

A review of other jurisdictions, most specifically British Columbia, suggests four elements best serve to define tourism communities:

- The overall Host and Guest ratio of visitors to residents
- Definable community support for development of tourism within the community and region
- Local business support
- Evidence of planning and a strategy to develop tourism

## **D. Conclusions and Next Steps**

- **Tourism communities are core visitor destination products that require investment**

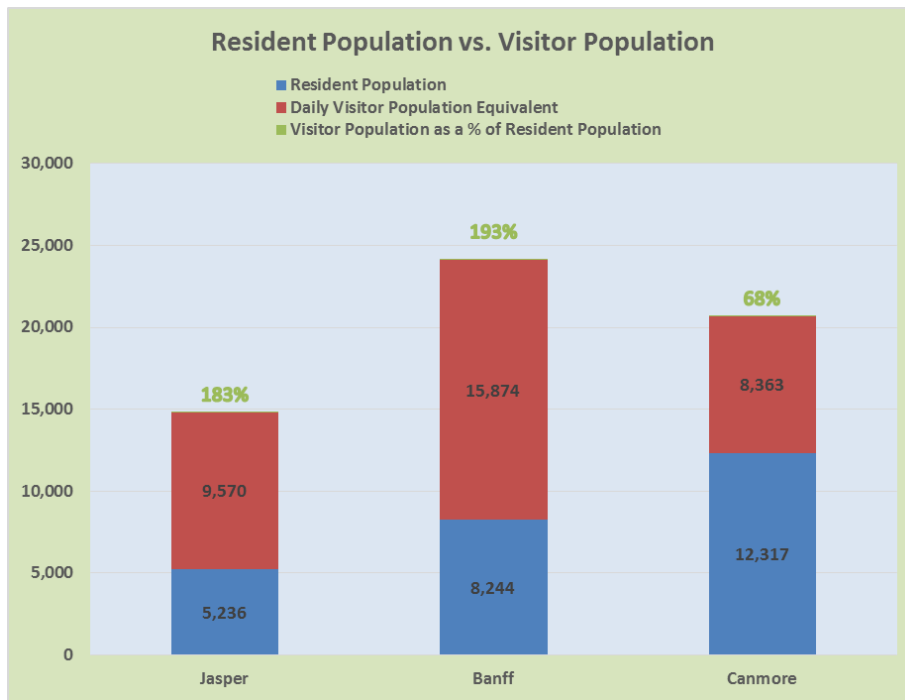
Alberta's tourism communities, Jasper, Canmore and Banff are key destination products that are helping Alberta deliver on its' Tourism Framework vision to increase the provincial tourism economy to \$10.3 billion per year by 2020. Collectively, Jasper, Banff and Canmore host 17% of annual overnight visitors in Alberta. These communities attract 31% of US and 63% of international visitation to the province. Their international success generates visits to other Alberta and western Canadian destinations.

As the governments responsible for delivering tourism amenities, Jasper, Banff and Canmore are the product. These resort towns are international destinations with visitors who expect a high-caliber tourism product and service capacity to host a large number of visitors. This visitor experience cannot be realized without a capacity for tourism communities to invest in the services to support the tourism product.

- **Resident taxpayers of tourism communities currently underwrite the infrastructure costs of developing a destination community**

As an industry, the quality of the tourism product requires community infrastructure to host visitors to remain competitive. Jasper, Banff and Canmore need to invest in amenities, infrastructure and services for a larger visitor population than other traditional Alberta communities, to ensure national and international travelers continue to visit Alberta.

***What is the Real Population of a Tourism Community?***

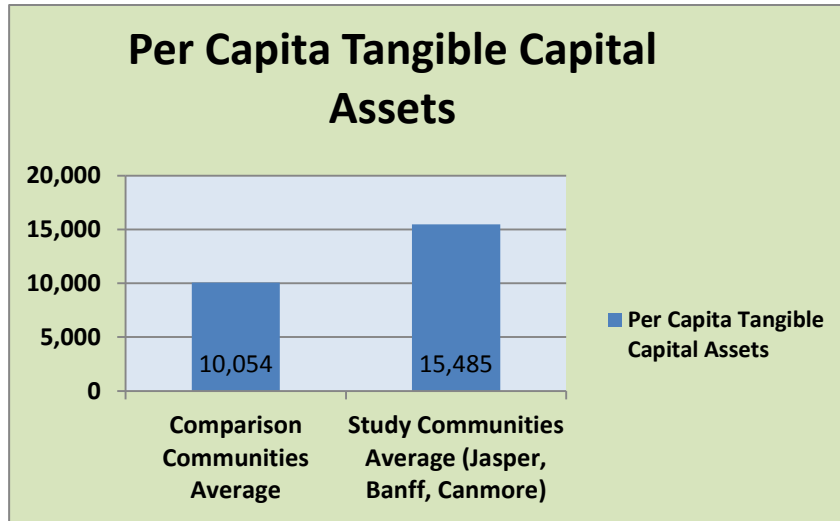


Jasper, Banff and Canmore finance community services for an effective population significantly higher than their resident population.

When dividing visitor days by days of the year to calculate visitor population, they show a significant guest population – Jasper 183%, Banff 193% and Canmore 68% of their host resident population (calculated from Brunnen 2012).

The small populations and a cap on commercial and residential growth in Banff and Jasper results in limited fiscal capacity and a small tax base to finance infrastructure for millions of visitors. The effective municipal servicing populations for Jasper, Banff and Canmore are significantly higher than their census populations.

**What incremental Capital Asset Costs are supported by Tourism Community?**



The capital value of infrastructure in tourism communities is a good proxy for comparison to non-tourism communities. Per capita tangible capital assets (Provincial 2012 Milnet data) show a \$15,485 average value of tourism community assets as compared to \$10,054 for ten similar sized non-tourism communities \*, a 54% increase in tangible capital asset investment requirements.

\* Communities = Stettler, Devon, Bonnyville, Olds, Sylvan Lake, Strathmore, Wetaskawin, High River, Brooks, Beaumont

This study shows incremental municipal servicing costs to host visitors for:

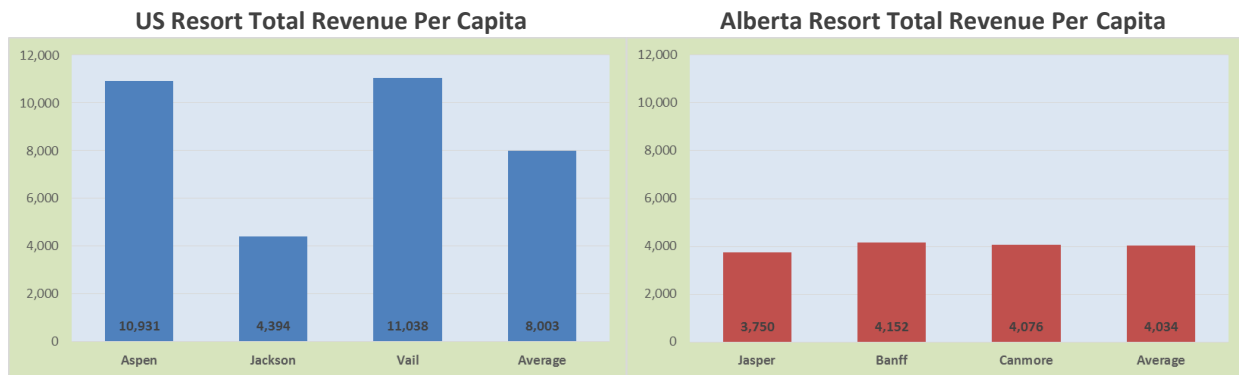
- Waste water treatment capacity
- Water service supply
- Transit services
- Marketing and revenue services
- Housing
- Parking services
  
- **Alberta’s tourism community competitors have developed revenue options**

Alberta’s tourism destination competitors have developed revenue and funding approaches to enable visitor destination investments and reduce fiscal impacts on residents.

In 2007, British Columbia implemented the Resort Municipality Initiative, a resort development program that provides fourteen defined resort municipalities with unique development and revenue sharing tools (valued at approximately \$10 million annually) to assist in providing services and amenities to visitor populations.

US mountain towns (Aspen, Jackson, Vail) benefit from financial tools to help them maintain their tourism infrastructure and enhance their visitor experience. They have (2012) revenue sources per capita reaching \$8,003 while Jasper, Banff and Canmore realize half of that amount at \$4,034.

**How do Alberta’s Tourism Community Competitors Fund Services and Amenities?**



- **Alberta municipal funding limits tourism community competitiveness**

Traditional Alberta municipal revenue sources, such as property tax, fail to directly capture the goods and services consumed by visitors. Provincial grant funding formulas (i.e. Municipal Sustainability Initiative) tend to be based on the permanent population, not visitor populations.

- **Revenue tools are the opportunity to help Alberta tourism communities be competitive**

Provincial recognition of the importance of and opportunity for tourism-based communities to fund infrastructure and services will enable the communities of Banff, Jasper and Canmore to further develop their destination brand and stay competitive with their counterparts. It is recommended that:

- The *Municipal Government Act* is amended to create and define a distinct municipal structure, that of tourism-based communities, which would have access to special revenue tools to enable them to grow their local economies in support of The Alberta Tourism Framework;
- A range of special revenue tools is created including a tourist consumption levy, a real estate transfer levy and provincial/municipal revenue sharing arrangements; and,
- The introduction of a specific revenue tool in a community would be subject to two safeguards: the alignment of a strategic tourism plan with provincial goals and to local approval.

In alignment with the AUMA MGA submission, access to special revenue tools for all municipalities would also enable tourism communities to build their destination brand and infrastructure.

## 1.0 INTRODUCTION

Tourism in Alberta contributed a net economic impact of \$8.3 billion to the provincial economy, including \$3.41 billion in total tax revenue to three levels of government (Government of Alberta 2012b). Its visitor expenditures from out of province represent a direct injection of wealth into the province.

Unlike other industries, tourism hinges upon the ability of local governments to provide a tourism destination experience within their communities to support and attract visitors. This involves investing in municipal and service infrastructure to both attract and host visitors within the community.

This project was sponsored by the Towns of Banff and Canmore and the Municipality of Jasper in their efforts to better understand how tourism communities are unique and what revenue approaches can be considered.

The intent of the research is to allow communities to:

- Understand program, marketing and infrastructure expenditure investments confronting Alberta Tourism communities
- Define what unique service characteristics make up a tourism community
- Develop revenue source alternatives for consideration in the Alberta Municipal Government Act review

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### ORGANIZATION OF THIS REPORT

This report has six main sections:

- **Section 1.0 - Introduction** - Introduces this report and describes its purpose
- **Section 2.0 - Approach** - Describes the research approach
- **Section 3.0 - Unique Tourism Community Service Demands** – Provides a comparative analysis of unique municipal service demands of tourism communities
- **Section 4.0- Enabling Tourism Communities** - Reviews and assesses ways to enable Tourism communities to invest in tourism infrastructure
- **Section 5.0 - Conclusions and Next Steps** - Identifies recommended actions forward
- **Appendices**

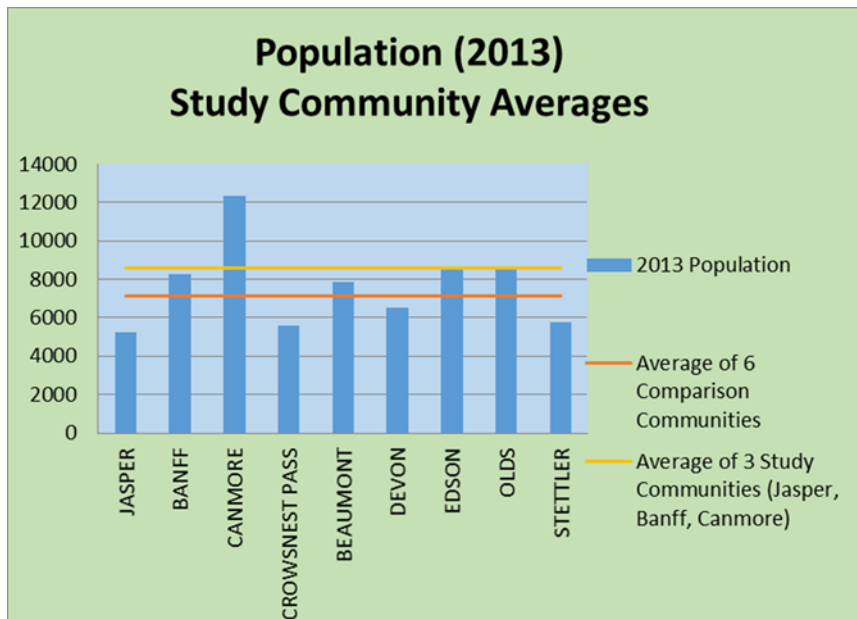


**2.0 APPROACH**

The research aims to examine tourism infrastructure, marketing and program expenditures of the Alberta Tourism communities of Jasper, Banff and Canmore, and benchmark their expenditures by asset and function against comparable sized communities.

The communities and their populations are compared below:

**FIGURE 1 COMMUNITY STUDY POPULATION AVERAGES**



Six 'Comparison Communities' were selected for their similar population size and willingness to engage in the Survey. The 2013 (Milenet) population of these communities shows similar population averages.

Three research questions form the structure of this report:

- What unique municipal service demands do tourism communities support?
- How can tourism communities be enabled to address their unique service demands?
- How to define a tourism community for future program and/or policy responses?

The methods undertaken for this work are identified for each research question below.

**WHAT UNIQUE MUNICIPAL SERVICE DEMANDS DO TOURISM COMMUNITIES SUPPORT?**

The level of demand for municipal services was undertaken with the following steps:

- Community core services which could reveal incremental visitor demands and costs on a tourism community were identified into a service typology (Appendix Three)
- Services were benchmarked and assessed for their data relevance and availability for a comparative tourism community analysis (Appendix Four)

- A survey was developed to collect data on community service demands (Appendix Five)
- A sample of comparable sized communities to Banff, Canmore and Jasper were selected using provincial Milenet data (Appendix Six)
- An on-line survey was administered directly to the CAOs of the survey communities

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#### HOW CAN TOURISM COMMUNITIES BE ENABLED TO ADDRESS UNIQUE SERVICE DEMANDS?

To identify options to enable tourism communities to address their unique service demands the following approach was taken:

- A secondary review of revenue tools to support municipal service demands was undertaken, examining communities in the same tourism market as Banff, Canmore and Jasper, in BC and their BC Resort Municipality Initiative and efforts in mountain resort towns in the U.S. Rockies
- Preliminary issues and options were assessed and presented to the Alberta Municipal Government Act Review (Municipality of Jasper et al 2014a) and redrafted for this report.

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#### HOW CAN A TOURISM COMMUNITY BE DEFINED FOR POLICY RESPONSE?

To enable Alberta to develop a policy response enabling tourism communities to address their unique infrastructure and service demands, a definition of a tourism community is needed. To identify what defines a tourism community, the following analysis<sup>1</sup> was developed, based on Brunnen (2012)<sup>1</sup>

An analysis of criteria to define tourism communities are reviewed and examined, including:

- Host and Guest ratio: Per capita accommodation units and per capita non-usual (i.e. recreational) dwellings
- Community support of a region: The potential for the community to encompass/ support a tourism region with complementary amenities
- Local Support: Credible business sector support to drive and invest in a tourism-focused community
- A Plan: Evidence of a local strategic plan for tourism

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<sup>1</sup> A report commissioned by the Alberta Tourism Communities Collaborative of 9 municipalities defined Alberta Tourism communities and developed recommendations for their fiscal capacity (Brunnen 2012).

**3.0 WHAT UNIQUE SERVICE DEMANDS DO TOURISM COMMUNITIES SUPPORT?**

A comparative survey was drafted to compare unique service demands of tourism communities:

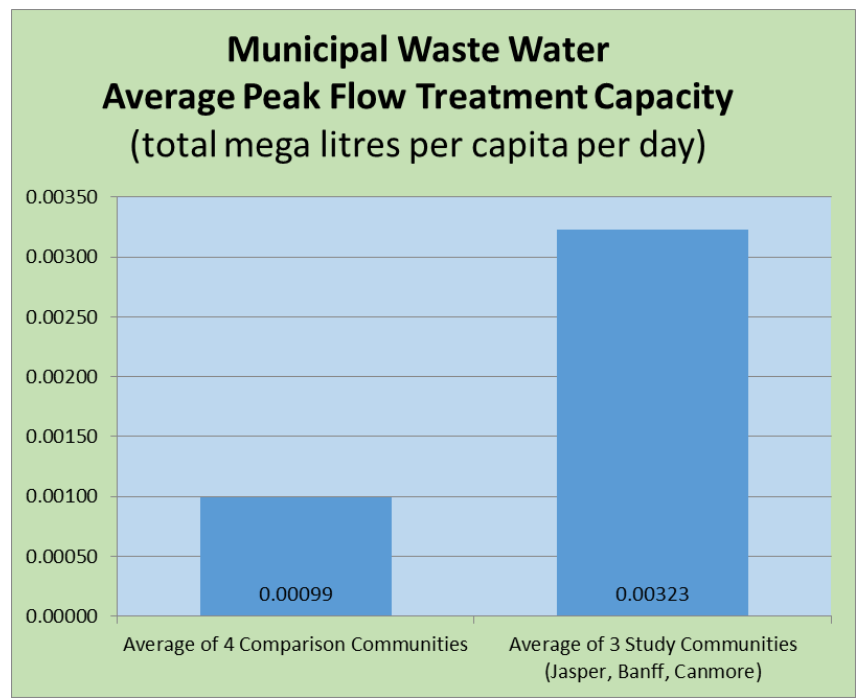
- Waste water services
- Water service supply
- Transit services
- Marketing and revenue services
- Housing services
- Parking services

Level of service demands is compared below on a per capita basis to help identify the excess service capacity that Tourism Communities build to support a high volume of visitors.

**3.1 WASTE WATER SERVICES**

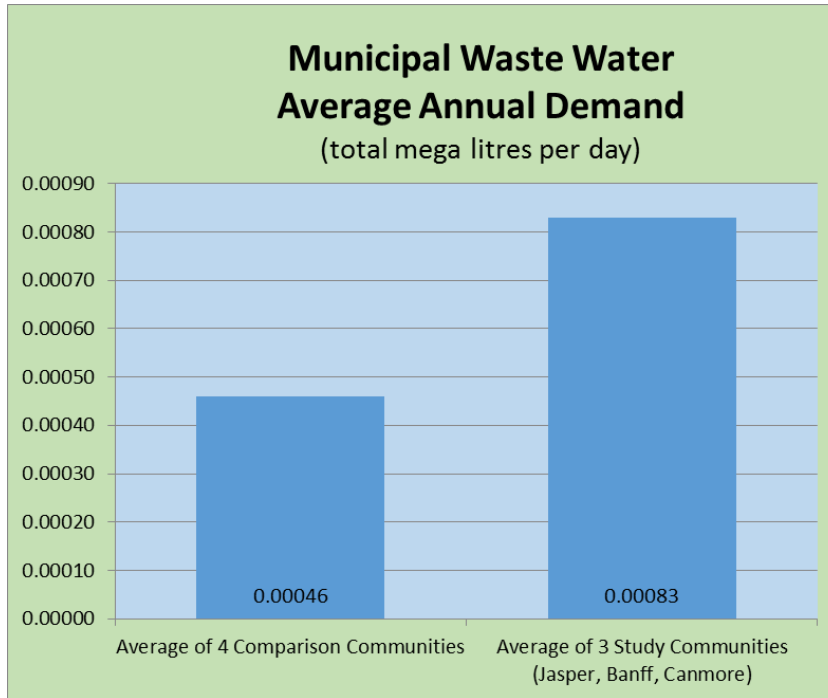
Waste water services are used by visitors as they use accommodations, recreation and wash facilities in the community. Waste Water Capacity, Peak Demand, and Average Annual Demand is provided below.

**FIGURE 2 WASTE WATER PEAK FLOW TREATMENT CAPACITY**



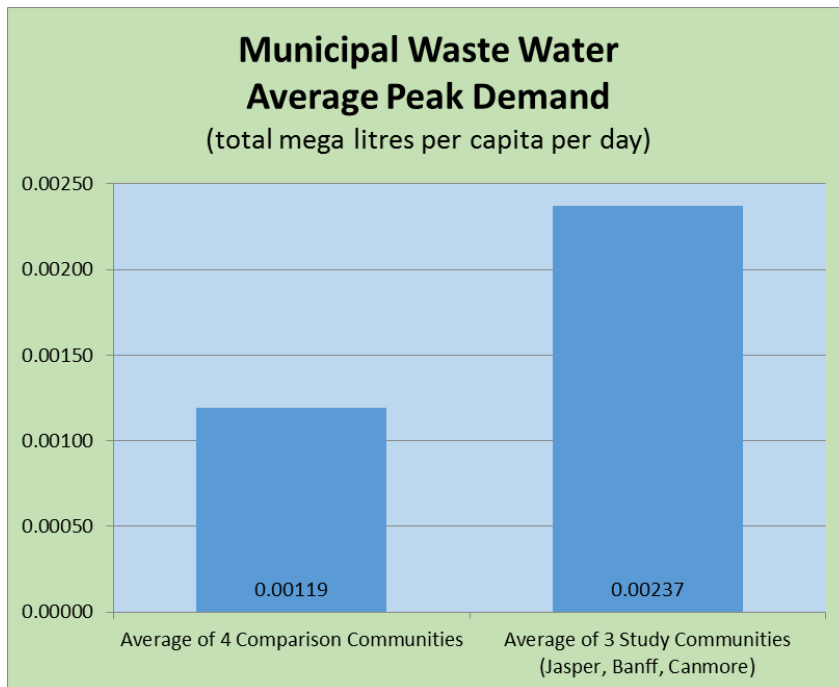
Tourism community waste water treatment capacity is over two times non-tourism community capacity. Banff has a significantly higher capacity. Jasper’s capacity is just above comparison communities.

**FIGURE 3 WASTE WATER PEAK DEMAND**



Average Annual Demand is significantly higher for both Banff and Canmore. Jasper has a Peak Demand just below the comparison community average.

**FIGURE 4 WASTE WATER AVERAGE DEMAND**

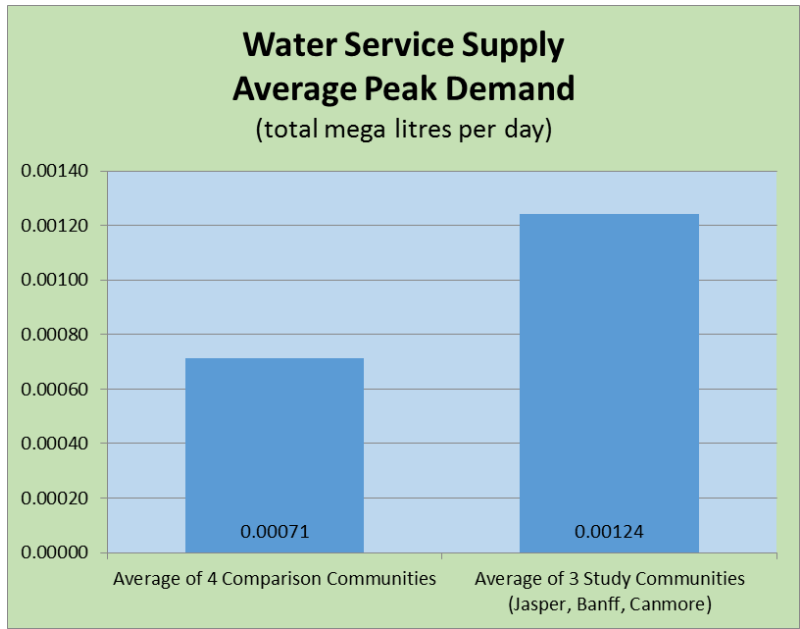


Tourism community wastewater Average Peak Demand is approximately twice as high as non-tourism communities.

3.2 WATER SERVICE SUPPLY

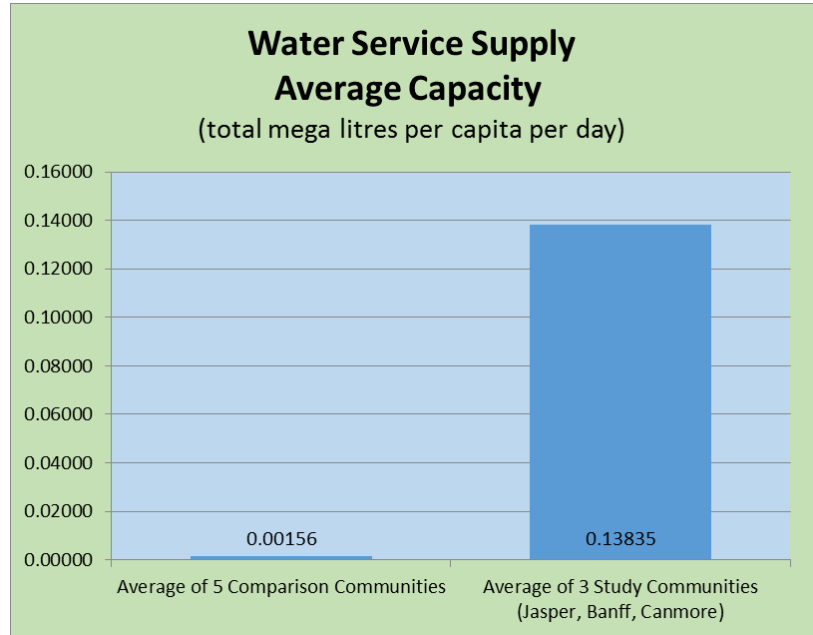
Water services are used by visitors as they use accommodations, recreation and wash facilities in the community. Water Service Capacity, Peak Demand, and Average Annual Demand are provided below.

**FIGURE 5 DAILY WATER SERVICE SUPPLY CAPACITY**



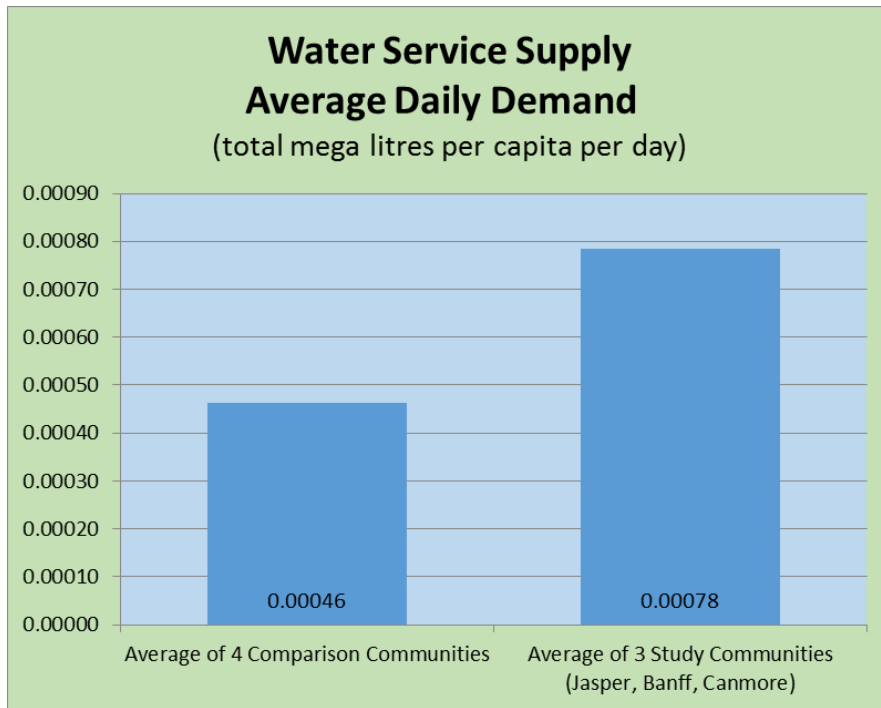
Community peak water service supply capacity varies between Study and Comparison communities. Canmore, for example has a low capacity whereas Banff has a high capacity.

**FIGURE 6 WATER SERVICE PEAK DEMAND**



Water Service Average Peak Demand is significantly higher for Jasper and Banff. All three Tourism Communities have a higher Average Peak Demand than Study Communities.

**FIGURE 7 DAILY WATER SERVICE AVERAGE DAILY DEMAND**

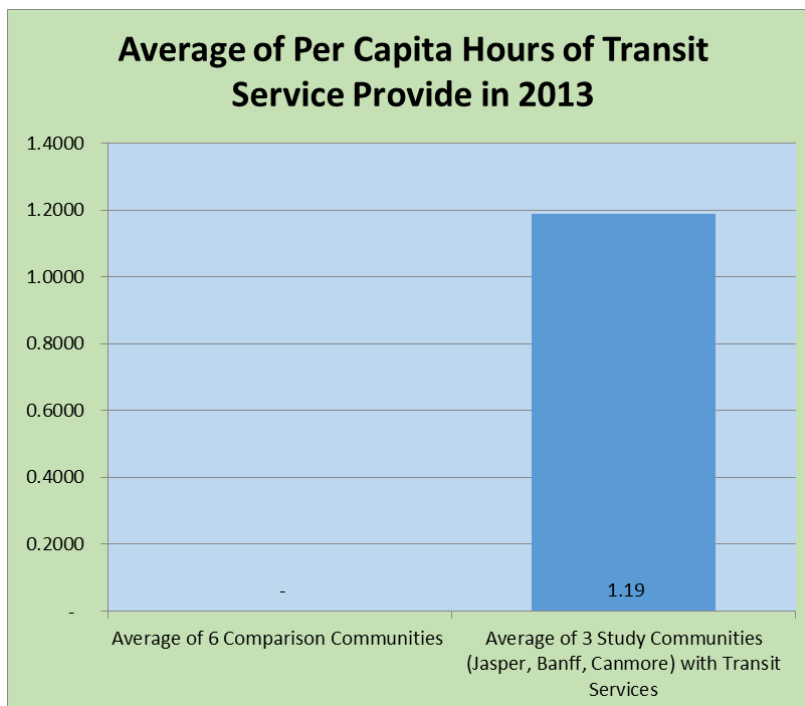


Average Daily Demand is higher on average than Study Communities with the exception of Stettler.

### 3.3 TRANSIT SERVICE

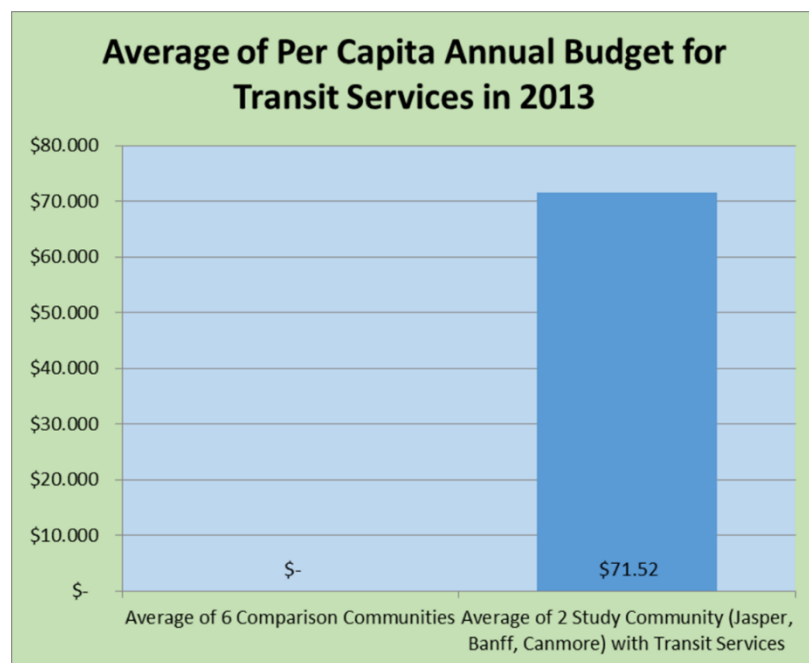
Tourism communities provide transit to support visitors and enable workers to access work places.

**FIGURE 8 PUBLIC TRANSIT SERVICE BUDGET**



An average of 1.19 hours of transit service per capita is available for Banff and Canmore.

**FIGURE 9 PUBLIC TRANSIT SERVICE BUDGET**



Public Transit Services are only provided in Banff and Canmore, who spend \$71.52 per capita to support this service.

Most communities have specialty seniors’ shuttle services delivered directly or through a community organization.

### 3.4 MARKETING SERVICES

Four types of locally generated revenue were found to support DMOs/EDOs in Alberta Communities (Table 1)

**TABLE 1 TOURISM INDUSTRY REVENUE TOOLS BY COMMUNITY**

Tourism Industry Revenue Tools	Comparison Communities	Study Communities
Designated Tax Source	<ul style="list-style-type: none"> <li>• Stettler</li> <li>• Olds</li> <li>• Crowsnest Pass</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>
Designated Licencing Source	<ul style="list-style-type: none"> <li>• Stettler</li> </ul>	<ul style="list-style-type: none"> <li>• Banff</li> <li>• Canmore</li> </ul>
Voluntary Hotel Destination Marketing Fee	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• Canmore</li> <li>• Jasper</li> </ul>
Direct Municipal Economic Development Support	<ul style="list-style-type: none"> <li>• Stettler</li> <li>• Beaumont</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>

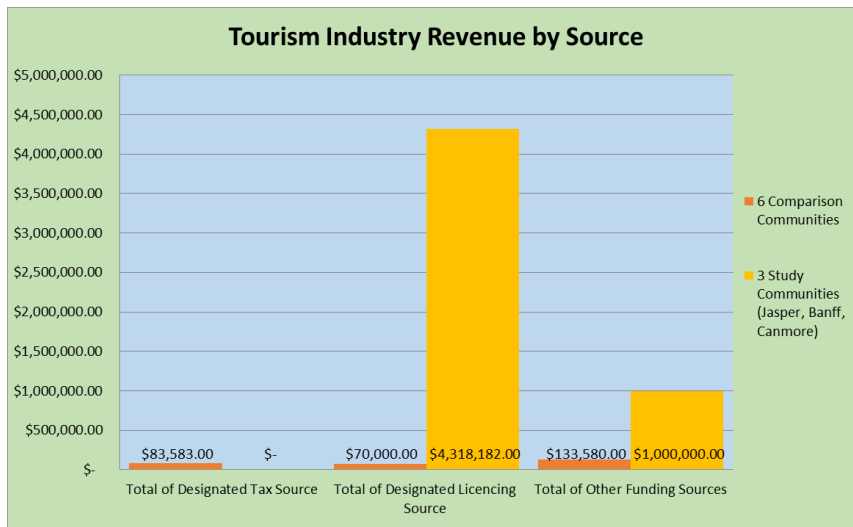
Designated Tax Source is a business tax applied to businesses within the municipality. Three comparison communities that fund economic development through this mechanism include Stettler, Olds and Crowsnest Pass. No study communities fund economic development using this revenue source.

Designated Licencing Source is funding provided through municipal business licencing. A portion of all revenue collected from municipal business licencing is directed to economic development. One comparison community that funds economic development through this mechanism, Stettler. Two study communities fund economic development using this revenue tool, Banff and Canmore.

Voluntary Hotel Destination Marking Fee is economic development funding provided through a fee on hotel room bills. The fee is paid for by the users of the hotel room. No comparison communities fund economic development using this revenue source. Two study communities that fund economic development initiatives through this mechanism include Canmore and Jasper.

Direct Municipal Economic Development Support is funding allocated by the municipality as from general tax revenue as part of their municipal annual budget. Two comparison communities fund economic development in this manner including Stettler and Beaumont. No study communities fund economic development using this revenue source.

**FIGURE 10 TOURISM INDUSTRY REVENUE SOURCE BY COMMUNITY**



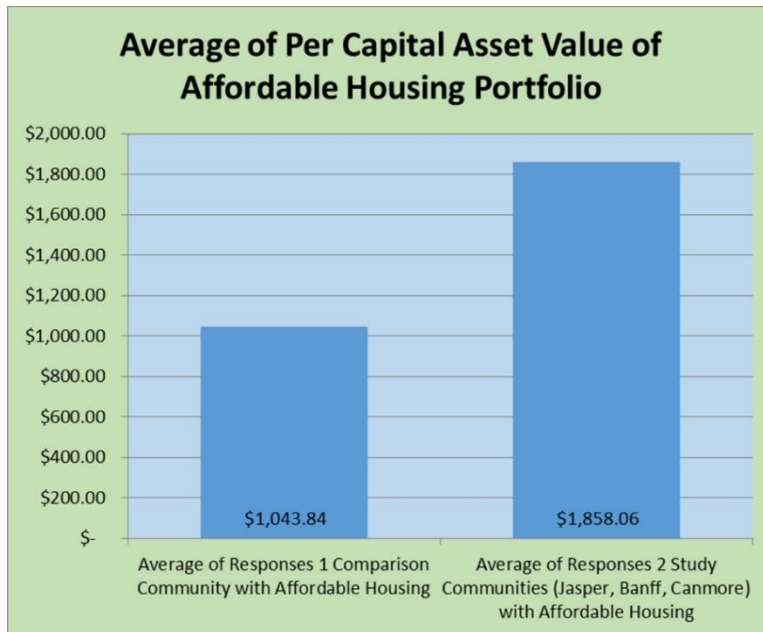
Banff and Canmore generate significant revenues, Banff generates some \$4.2 million through designated licensing and Canmore generates over \$1 million through voluntary destination marketing fee.

### 3.5 HOUSING

Affordable Housing is needed in tourism communities to support lower income service sector workers and for employee housing for the busy winter and summer seasons.



**FIGURE 11 ASSET VALUE OF AFFORDABLE HOUSING PORTFOLIO**



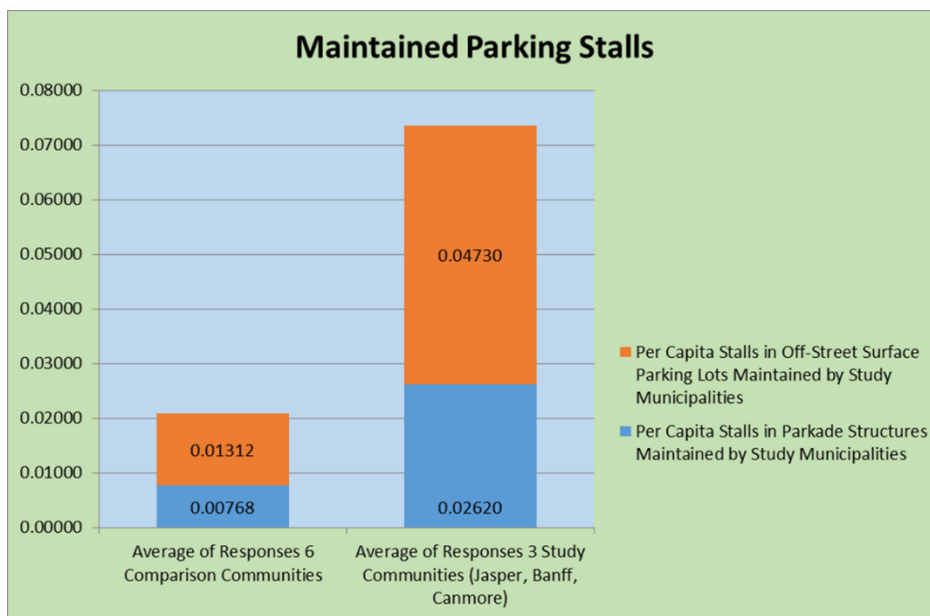
Most communities have a housing portfolio consisting of seniors housing. Only two Study communities and one Comparison Community provides affordable housing.

Banff and Canmore’s Affordable Housing portfolio totals over \$1,800 per capita.

### 3.6 PARKING SERVICES

Off street parking lots and built multi-story parking structures are provided by tourism communities for visitor parking. These are separate from available street parking.

**FIGURE 12 MAINTAINED OFF-STREET PARKING STALLS**



Tourism communities have more than three and a half times the number of off-street parking stalls per capita than non-tourism communities.

There is approximately one maintained off-street parking stall for every 130 residents in tourism communities.

## 4.0 HOW CAN ALBERTA TOURISM COMMUNITIES BE ENABLED?

Alberta's community tourism destinations key market competitors, the United States and British Columbia, have access to a broader range of revenue tools. These tools are used to invest in providing services and amenities to visiting tourists, enhancing their competitiveness.

This section identifies revenue tools and considerations for Alberta's Tourism communities.

### 4.1 MUNICIPAL REVENUE SOURCES

Various levies have been imposed to help governments extract revenues from visitors to compensate for the costs of servicing visitor populations. These include: airport/ airline fees, accommodation supplements, value-added consumption/ sales taxes, liquor taxes, attraction/ entertainment charges, tolls, fuel charges, car rental taxes, eco-tourism taxes, payroll/ training taxes and gaming taxes.

In some cases these revenue sources accrue to senior levels of government such as the Alberta Tourism Levy Act or the BC Hotel Room Tax.

Revenue sharing and granting programs have been developed to compensate local governments for costs incurred by visitor populations. The BC Resort Municipality Initiative is an example of a provincial-municipal revenue sharing program that provides provincially collected hotel room tax revenues to defined resort municipalities.

Some resort communities such as Aspen, Telluride, Vail and South Lake Tahoe in the United States also levy a real estate transfer levy. In Vail, Aspen and Crested Butte Colorado, for example, the real estate transfer levy is used by these municipal authorities to fund capital projects to support their Tourism community development.

US mountain town resort competitors have (2012) revenue sources per capita reaching \$8,003 while Jasper, Banff and Canmore realize half of that amount at \$4,034 (Municipality of Jasper, Town of Banff, Town of Canmore, 2012).

Comparing revenue of Alberta's core tourism community competitors (Aspen, Jackson and Vail) show significant difference in per capita revenues (Figures 13 and 14).

FIGURE 13 TOTAL REVENUE PER CAPITA, US RESORT TOWNS

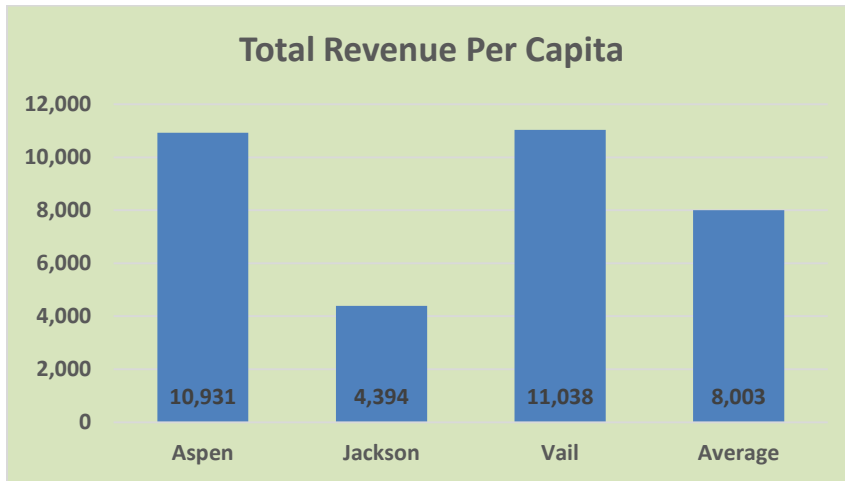
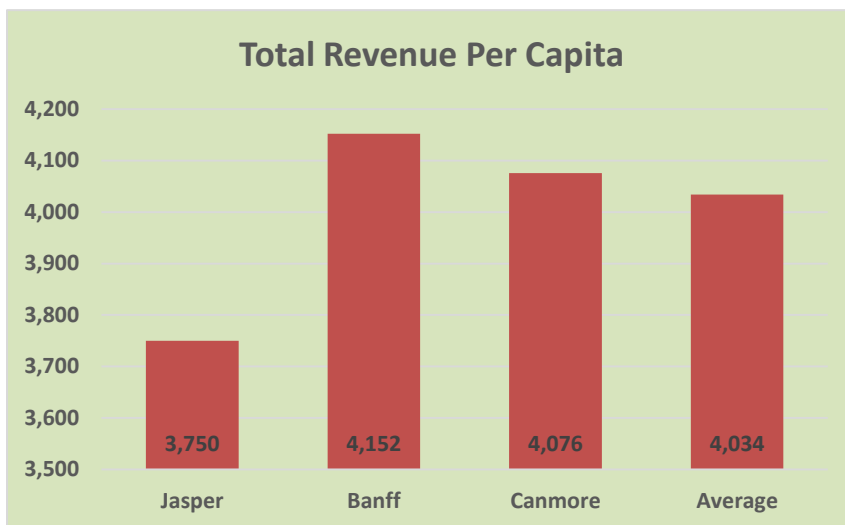


FIGURE 14 TOTAL REVENUE PER CAPITA, ALBERTA TOURISM COMMUNITIES



Property taxes for Aspen, Vail and Jackson Hole represent 13% of their budgets on average; for Jasper, Banff and Canmore this represents 36% of their budget.

Similarly, property taxes as a percent of revenue for Alberta’s competitors are significantly different (Figures 15 and 16)

FIGURE 15 PROPERTY TAX AS A % OF TOTAL REVENUE, US RESORT COMMUNITIES

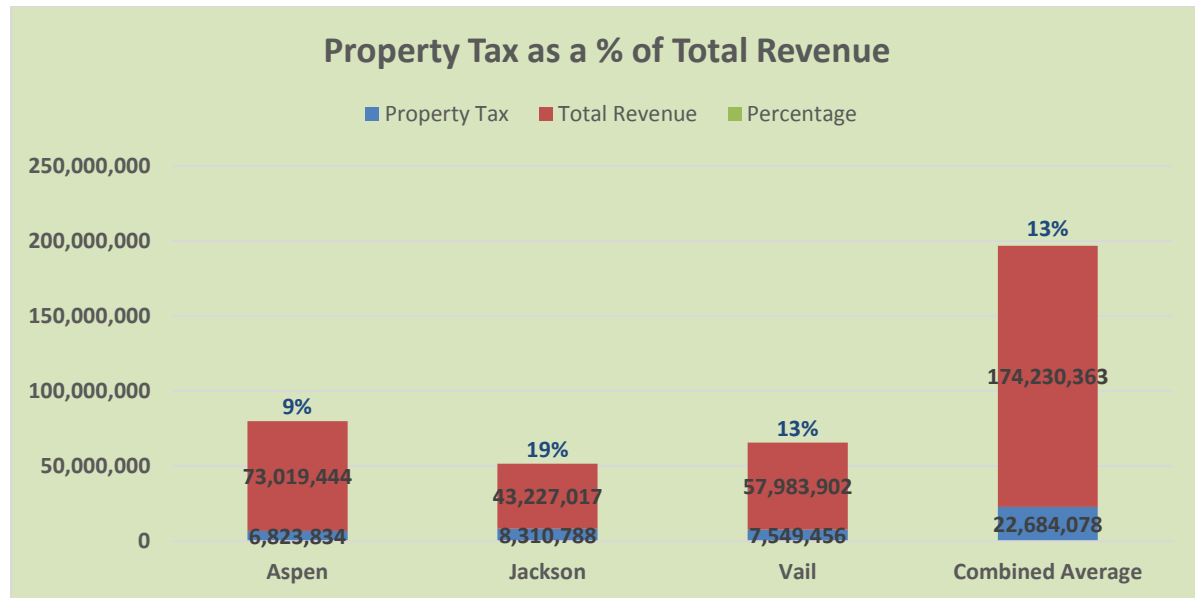
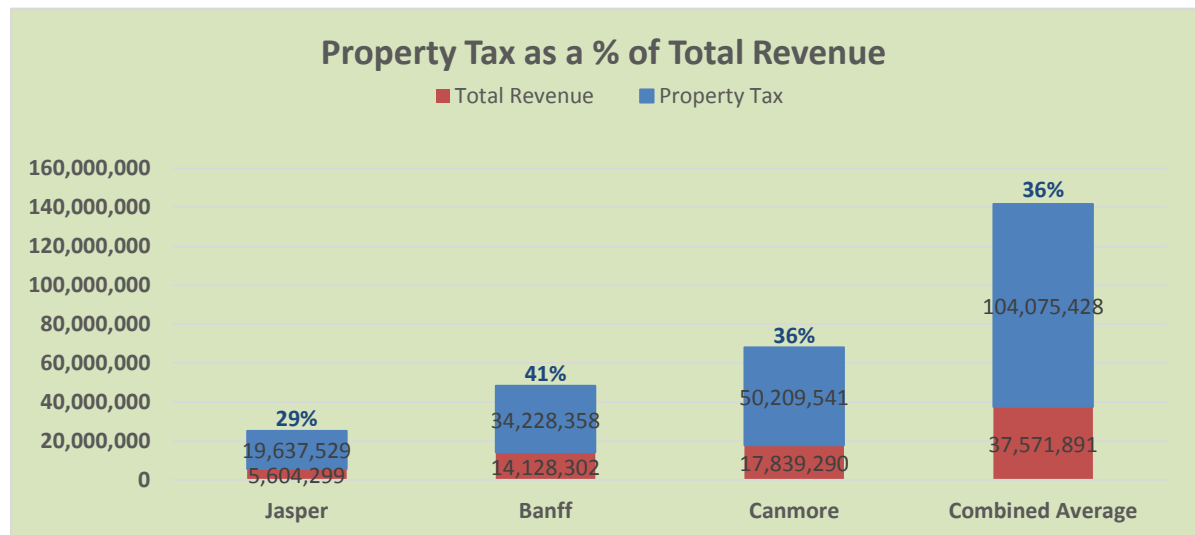


FIGURE 16 PROPERTY TAX AS A % OF TOTAL REVENUES, ALBERTA TOURISM COMMUNITIES



#### 4.2 MUNICIPAL TOURISM REVENUE SOURCES - ANALYSIS

Revenue sources for Alberta tourism communities need to satisfy a number of public policy criteria. For example, consideration should be given to rewarding the unique and active role played by local governments in enhancing the tourism economy. Revenue sources would satisfy four generally accepted tax policy criteria: equity, efficiency, administrative and compliance costs, and accountability.

More specifically, the revenue tool should sufficiently satisfy the following questions:

- Does the revenue source incent these communities to grow the tourism economy?
- Does the revenue source provide sufficient revenues for the community?
- Is the revenue source equitable? That is: Do the beneficiaries (visitors) incur the costs (i.e. benefits paid principle)? Does the revenue source treat similar industries and taxpayers similarly (i.e. horizontal equity)? Is the levy linked to ability to pay (i.e. vertical equity)?
- Is the revenue source efficient (i.e. are economic distortions minimized)?
- Are administrative costs related to collection, reporting and compliance minimized?
- Is the revenue source sufficiently accountable and responsive to taxpayer demand?

Identifying potential revenue sources for defined Alberta Tourism communities requires an understanding of their tourism markets and the goods and services consumed by visitors to their communities.

According to surveys conducted by Parks Canada in Banff, Jasper, Yoho, Kootenay and Waterton National Parks, National Park visitors participate in the following activities during their visit:

*Driving and sightseeing, eating in a restaurant, shopping, sightseeing landmarks, hiking, relaxing, walking, visiting the hot pools, eating outside a restaurant, viewing wildlife, riding a gondola, visit a museum or historic site, downhill skiing or snowboarding, education or interpretation programs, visiting with others, business or conference, canoeing and kayaking, horseback riding, taking a boat cruise, cycling, mountain biking, cross-country skiing, rafting, bird watching, mountaineering, backpacking, fishing, snowshoeing, ice climbing, camping, staying in a hotel, boat touring.*

Surveys conducted in the Town of Canmore reveal similar visitor expenditure patterns, including expenditures on recreation and entertainment, accommodation, restaurant meals, retail and souvenir purchases, transportation and conference/ convention expenditures.

Based on this assessment, the *Municipal Government Act* should be amended to allow Alberta Tourism communities access to the following revenue tools:

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#### 4.2.1 TOURISM CONSUMPTION LEVY

The consumption nature of the goods and services demanded by visitors warrants a tourism consumption levy as a method for providing Tourism communities with diversified revenues. These levies respect the benefits principle of charging visitors for the costs imposed in their communities. Based on the list of visitor activities and expenditures identified, consumption levies could be imposed community-wide or on specific subsets such as alpine skiing lift tickets, rental equipment, and admissions to events, as well as restaurant meals, retail items and commercial over- night accommodation.

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#### 4.2.2 REAL ESTATE TRANSFER LEVY

In Tourism communities that do not have home-owner residency requirements, such as Canmore, there is significant demand for recreation property ownership. This demand imposes additional infrastructure costs on the community without a corresponding increase in provincial per capita grants, and can lead to housing price appreciations that place affordable home ownership out of reach of average households and tourism sector employees. A real estate transfer levy would be an effective and appropriate tool to assist these Alberta Tourism communities in recovering the costs imposed by recreation property owners.

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#### 4.2.3 PROVINCIAL REVENUE SHARING

Senior levels of government benefit significantly from the tourism industry, both directly through revenue sources such as the provincial four per cent accommodation levy and the National Park gate fee; and indirectly through increased corporate and personal income, fuel, tobacco, alcohol and federal goods and services taxes.

In 2010 the Government of Alberta estimated that visitors to Alberta's Canadian Rockies Tourism Destination Region generated \$429 million total taxation revenue. This consisted of \$264 million for the federal government, \$121 million in taxes for the province and \$44 million in taxes for local governments' province wide.

The province could apply revenue sharing as a policy choice to share the economic benefits of the tourism industry. The next section reviews how a tourism community could be defined for the purposes of policy and program definition.

## 5.0 WHAT DEFINES A TOURISM COMMUNITY?

A definition of a tourism community will distinguish communities that host and have made an investment to develop as a tourist destination. A review of other jurisdictions, most specifically British Columbia, suggests four elements best serve to define Tourism communities:

1. Host and Guest Ratio
2. Community Support of a Tourism Region Development
3. Local Business Support
4. A Plan for Tourism Development

### 5.1 HOST AND GUEST RATIO

Communities can be defined using one or two of the approaches that help measure the ratio of hosts to guests in the community:

1. Total and per capita accommodation units in the community, relative to the provincial average
2. Total and per capita non-resident (i.e. recreation) properties in the community, relative to the provincial average

#### TOTAL AND PER CAPITA ACCOMMODATION UNITS

An analysis of the per capita accommodation units in Alberta municipalities was undertaken using the Alberta Hotel and Lodging Association's Approved Accommodation Guide (2008). Two communities, Jasper and Banff stand out as having nine times the provincial average of accommodation units per capita (Table 2).

TABLE 2 DISTRIBUTION OF ACCOMMODATION UNITS PER (1000 POPULATION)\*

Per Capita Accommodation Range	Municipality	Units Per 1000 Population	Total Units	2007 Population
Between 1 and 3 times the Average (79-158)	Town of Canmore	141.7	1706	12,039
Between 3 and 9 times the Average (159-474)				
Greater than 9 times the Average (475+)	Town of Banff	496.8	4333	8,721
	Municipality of Jasper	509.4	2365	4,643

\* Local Governments with Per Capita Accommodation Units Greater Than 1.5\* the Provincial Average (79) and, for Communities Outside National/ Provincial Parks, Total Accommodation Units Greater Than 10 Times the Average (1611)

Canmore, Banff and Jasper have a per capita accommodation units greater than 1.5 times the provincial average (79 per 1,000 population) and a total number of accommodation units greater than ten times the average (1611). Canmore has 1,706 units, Banff 4,333 and Jasper 2,365 units.

### NON-RESIDENT DWELLING UNITS

Of local governments with non-resident dwellings greater than 1.5 times the average (246 per 1,000 population), Canmore is significantly above other communities as a vacation property destination.

A review of the 2006 Canadian Census data on number of private dwellings not occupied by usual residents shows Canmore as having between 7 and 7.5 times the provincial average of private dwellings not occupied by usual residents with 1,797 (2006) non-resident dwellings (Table 3). Since 2006, the number of non-resident dwelling units in Canmore has continued to grow, reaching 2,135 in 2011, while the permanent population has remained static.

TABLE 3 COMMUNITY NON-RESIDENT DWELLING PER CAPITA AVERAGES\*

Total Non-Usual Resident Dwelling Thresholds*	Municipality	Total Dwellings Not Occupied By Usual Residents
Between 1.5 and 2 * Provincial Average (369 – 491)	Town of Crowsnest Pass	371
	M.D. Of Pincher Creek	379
	County Of Barrhead	394
	County Of St. Paul	419
	Cypress County	440
Between 2 and 2.5 * Provincial Average (492 – 614)	Smoky Lake County	509
	Town of Sylvan Lake	610
Between 2.5 and 3 * Provincial Average (615 – 737)	M.D. Of Opportunity	615
	County Of Wetaskiwin	622
Between 3 and 3.5 * Provincial Average (738 – 860)		
Between 3.5 and 4 * Provincial Average (861-983)	Lac Ste. Anne County	894
	County Of Athabasca	894
Between 4 and 4.5 * Provincial Average (984 – 1106)	Lac La Biche County	1,025
Between 4.5 and 5 * Provincial Average (1107 – 1229)		
Between 5 and 5.5 * Provincial Average (1230 – 1352)	Red Deer County	1,330
Between 5.5 and 6 * Provincial Average (1353 – 1352)		
Between 6 and 6.5 * Provincial Average (1353 – 1475)		
Between 6.5 and 7 * Provincial Average (1476 – 1721)		
Between 7 and 7.5 * Provincial Average (1722 – 1845)	Town of Canmore	1,797
* Local Governments with Per Capita Non-Usual Resident Dwellings Greater Than 1.5*Average (53) and Total Non- Usual Resident Dwellings Greater Than 1.5*Average (369), Listed by Average Total Multiples		



## SUMMARY

The Town of Banff and the Municipality of Jasper are distinguished as tourism communities under the accommodation unit approach, and the Town of Canmore would be eligible as a tourism community under the non-resident property approach.

We recognise that there are other communities that have a high level of accommodation units and non-resident accommodations and that the province may see value in setting up a mechanism that enables other communities who grow their tourism business to aspire to a designation as a Tourism community.

### 5.2 COMMUNITY SUPPORT OF A TOURISM REGION

Any tourism community definition needs to incorporate flexibility in determining the geographic boundaries of the tourism area to accommodate regions that a host community supports. While local governments tend to be defined based on municipal boundaries, those communities are a key attraction and provide services for a broader region.

The definition of a tourism community needs to be framed so that the area of local governments encompassing a single eligible Tourism community may become part of the Tourism community for the purposes of accessing tourism community benefits.

The local governments within the tourism regions of Banff, Canmore and Jasper that could satisfy these criteria include:

1. Banff Region: the Town of Banff and ID 9, which contains the hamlet of Lake Louise
2. Canmore Region: the Town of Canmore, Kananaskis Improvement District and the Hamlets of Harvie Heights and Dead Man's Flats
3. Jasper Region: the Municipality of Jasper and ID 12

### 5.3 LOCAL BUSINESS SECTOR SUPPORT

Credible business sector support and commitment to developing and promoting the community is critical to the success of any local government driven Tourism initiative. Unlike other industries, a vibrant tourism sector hinges upon a community's ability to offer a leisure destination experience.

Businesses own and operate many attractions, services, accommodations, restaurants and recreational activities that draw tourists to the community. From a local government perspective, creating a leisure destination experience involves developing a unique tourist brand embodied in all aspects of the community.

A business supported tourism fee collected within the area of the tourist-based community is such a demonstration of credible business sector support, and could be a prerequisite to meet the tourism-community definition.

#### 5.4 A PLAN TOWARDS TOURISM DEVELOPMENT

Local government initiatives are most successful when built from strategic planning analyses. From a Tourism community perspective, this would entail an understanding of economic conditions, trends, opportunities and challenges shaping the tourism region, developed in collaboration with key stakeholders.

A local tourism strategy aligned to provincial goals should be a pre-requisite for the introduction of a specific revenue tool in a community. The strategic plan would assist communities in using revenue sources to develop the tourism economy.

**6.0 CONCLUSIONS AND NEXT STEPS**

- **Tourism communities are core visitor destination products that require investment**

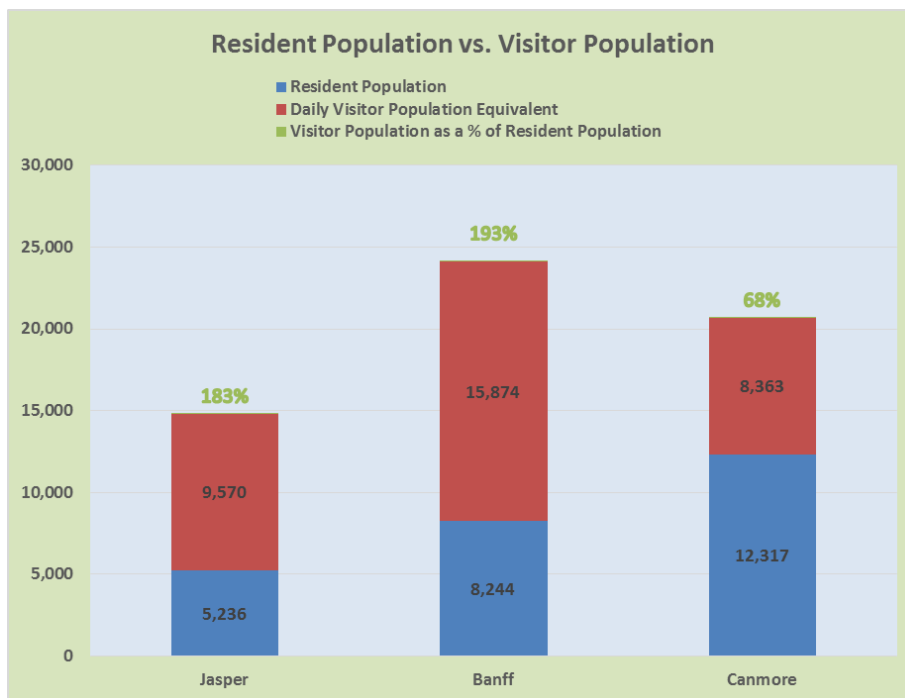
Alberta’s tourism communities, Jasper, Canmore and Banff are key destination products that are helping Alberta deliver on its’ Tourism Framework vision to increase the provincial tourism economy to \$10.3 billion per year by 2020. Collectively, Jasper, Banff and Canmore host 17% of annual overnight visitors in Alberta. These communities attract 31% of US and 63% of international visitation to the province. Their international success generates visits to other Alberta and western Canadian destinations.

As the governments responsible for delivering tourism amenities, Jasper, Banff and Canmore are the product. These resort towns are international destinations with visitors who expect a high-caliber tourism product and service capacity to host a large number of visitors. This visitor experience cannot be realized without a capacity for tourism communities to invest in the services to support the tourism product.

- **Resident taxpayers of tourism communities currently underwrite the infrastructure costs of developing a destination community**

As an industry, the quality of the tourism product requires community infrastructure to host visitors to remain competitive. Jasper, Banff and Canmore need to invest in amenities, infrastructure and services for a larger visitor population than other traditional Alberta communities, to ensure national and international travelers continue to visit Alberta.

***What is the Real Population of a Tourism Community?***



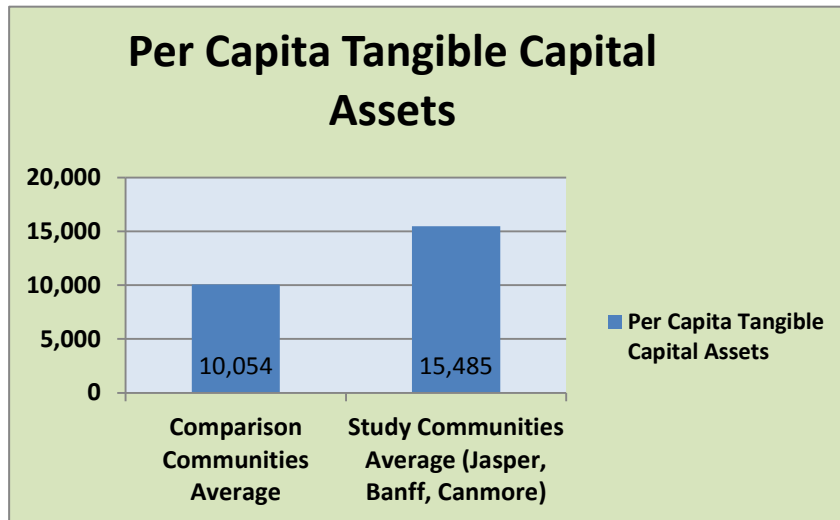
Jasper, Banff and Canmore finance community services for an effective population significantly higher than their resident population.

When dividing visitor days by days of the year to calculate visitor population, they show a significant guest population – Jasper 183%, Banff 193% and Canmore 68% of their host resident population (calculated from Brunnen 2012).

The small populations and a cap on commercial and residential growth in Banff and Jasper results in limited fiscal capacity and a small tax base to finance infrastructure for millions of visitors. The effective

municipal servicing populations for Jasper, Banff and Canmore are significantly higher than their census populations.

**What incremental Capital Asset Costs are supported by Tourism Community?**



The capital value of infrastructure in tourism communities is a good proxy for comparison to non-tourism communities. Per capita tangible capital assets (Provincial 2012 Milnet data) show a \$15,485 average value of tourism community assets as compared to \$10,054 for ten similar sized non-tourism communities \*, a 54% increase in tangible capital asset investment requirements.

\* Communities = Stettler, Devon, Bonnyville, Olds, Sylvan Lake, Strathmore, Wetaskawin, High River, Brooks, Beaumont

This study shows incremental municipal servicing costs to host visitors for:

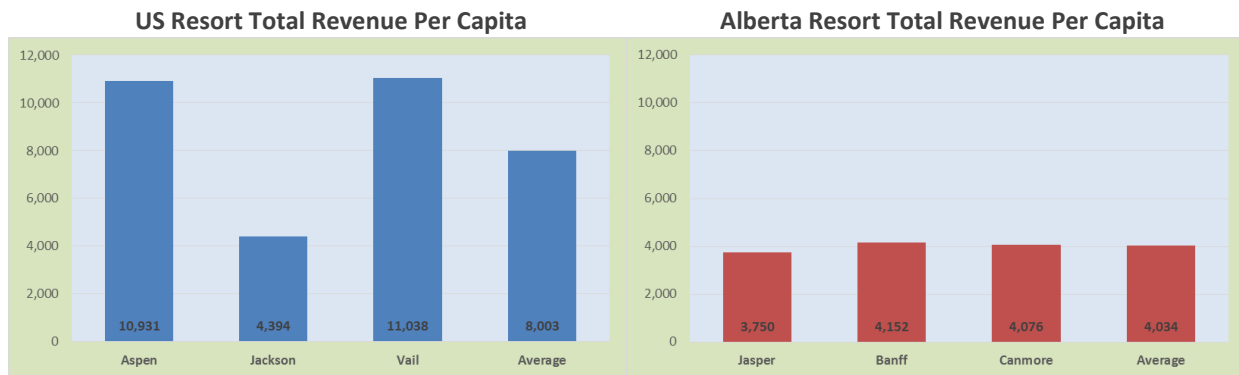
- Waste water treatment capacity
- Water service supply
- Transit services
- Marketing and revenue services
- Housing
- Parking services
  
- **Alberta’s tourism community competitors have developed revenue options**

Alberta’s tourism destination competitors have developed revenue and funding approaches to enable visitor destination investments and reduce fiscal impacts on residents.

In 2007, British Columbia implemented the Resort Municipality Initiative, a resort development program that provides fourteen defined resort municipalities with unique development and revenue sharing tools (valued at approximately \$10 million annually) to assist in providing services and amenities to visitor populations.

US mountain towns (Aspen, Jackson, Vail) benefit from financial tools to help them maintain their tourism infrastructure and enhance their visitor experience. They have (2012) revenue sources per capita reaching \$8,003 while Jasper, Banff and Canmore realize half of that amount at \$4,034.

**How do Alberta’s Tourism Community Competitors Fund Services and Amenities?**



- **Alberta municipal funding limits tourism community competitiveness**

Traditional Alberta municipal revenue sources, such as property tax, fail to directly capture the goods and services consumed by visitors. Provincial grant funding formulas (i.e. Municipal Sustainability Initiative) tend to be based on the permanent population, not visitor populations.

- **Revenue tools are the opportunity to help Alberta tourism communities be competitive**

Provincial recognition of the importance of and opportunity for tourism-based communities to fund infrastructure and services will enable the communities of Banff, Jasper and Canmore to further develop their destination brand and stay competitive with their counterparts. It is recommended that:

- The *Municipal Government Act* is amended to create and define a distinct municipal structure, that of tourism-based communities, which would have access to special revenue tools to enable them to grow their local economies in support of The Alberta Tourism Framework;
- A range of special revenue tools is created including a tourist consumption levy, a real estate transfer levy and provincial/municipal revenue sharing arrangements; and,
- The introduction of a specific revenue tool in a community would be subject to two safeguards: the alignment of a strategic tourism plan with provincial goals and to local approval.

In alignment with the AUMA MGA submission, access to special revenue tools for all municipalities would also enable tourism communities to build their destination brand and infrastructure.

## APPENDICES

## APPENDIX ONE: DEFINITIONS

Term	Term Use	Definition
<b>Population</b>	2013 Milenet Data	Population as reported annually by all Alberta Municipalities. All per capita calculations utilized 2013 Milenet Population data
<b>Municipal Waste Water Peak Flow Treatment Capacity (total mega litres per day)</b>	Self-Report Survey	The maximum wastewater flow that can be accommodated within the municipal waste water system, measured in total mega litres per day
<b>Peak Municipal Wastewater Demand (total mega litres per day)</b>	Self-Report Survey	The maximum municipal wastewater discharged in the municipality at a single moment in time, measured in total mega litres per day.
<b>Average Annual Wastewater Demand (total mega litres per day)</b>	Self-Report Survey	The wastewater discharged by the municipality as an average through the entire year, measured in total mega litres per day.
<b>Peak Municipal Wastewater Demand (highest demand month of year)</b>	Self-Report Survey	The month of the year with the highest wastewater discharged within the municipality.
<b>Water Service Supply Capacity (total mega litres per day)</b>	Self-Report Survey	The maximum potable water flow that can be accommodated within the municipal water servicing system, measured in total mega litres per day
<b>Maximum Peak Demand Water Service Supply (total mega litres per day)</b>	Self-Report Survey	The maximum municipal potable water that is used in the municipality at a single moment in time, measured in total mega litres per day.
<b>Average Daily Demand Water Service Supply (total mega litres per day)</b>	Self-Report Survey	The potable water used by the municipality as an average through the entire year, measured in total mega litres per day.
<b>Peak Demand Water Service Supply (peak demand Month of Year)</b>	Self-Report Survey	The month of the year with the highest potable water use within the municipality.
<b>Transit Services</b>	Self-Report Survey	A public transportation service provides shared transportation, often in the form of buses. For the purposes of this study, public transportation does not include handicapped specific transportation or regional transit systems
<b>DMO</b>	Self-Report Survey	Designated Marketing Organization

Term	Term Use	Definition
<b>EDO</b>	Self-Report Survey	Economic Development Organization
<b>Employee Housing</b>	Self-Report Survey	means one or more dwelling units used exclusively for the residence of employees and members of their family.
<b>Affordable Housing</b>	Self-Report Survey	Affordable Housing is housing that does not cost more than 35% of a household's gross income regardless of where they live, and that does not compromise an individual's ability to meet other basic needs, including food, clothing and access to education. This does not include seniors housing
<b>How many parkade structures does your municipality maintain?</b>	Self-Report Survey	A multi-story parking structure maintained by the municipality. Stalls within the structure are marked. The majority of the stalls are available to the general public and may be time restricted and / or require payment for temporary use.
<b>How many stalls in parkade structure does your municipality maintain?</b>	Self-Report Survey	The number of marked individual parking stalls available to the general public within a parkade structure.
<b>How many off-street surface parking lots does your municipality maintain?</b>	Self-Report Survey	An at-grade parking lot maintained by the municipality. Stalls within the parking lot are marked. The majority of the stalls are available to the general public and may be time restricted and / or require payment for temporary use.
<b>How many stalls in off-street surface parking lots does your municipality maintain?</b>	Self-Report Survey	The number of marked individual parking stalls located in at-grade parking lots.

## APPENDIX TWO: REFERENCES

- BC Resort Task Force (2004). Recommendations of the BC Resort Task Force. Prepared for the BC Ministry of Tourism Sport and Art.
- Brunnen, Ben (2012) Alberta Tourism Communities: Definition and Revenue Sources. Brunnen Policy and Research.
- City of Aspen (2010) Planning for a Lifelong Aspenite. 2010 Aspen Area Community Plan. City of Aspen.
- Government of Alberta (2012a) Tourism in Canadian Rockies Tourism Region. A Summary of 2012 Visitor Numbers and Characteristics.
- Government of Alberta (2012b) Tourism Works for Alberta. The Economic Impact of Tourism in the Canadian Rockies Region 2012.
- Government of Alberta (2015) Milnet Data Base. Ministry of Municipal Affairs.
- Gov't of BC (2011) Resort Municipality Initiative. 2012 to 2016 Resort Development Strategy Guide.
- Municipality of Jasper, Town of Banff, Town of Canmore (2012). Growing Alberta's Tourism Economy.
- Municipality of Jasper, Town of Banff, Town of Canmore (2014a). Alberta Tourism Communities: Enabling Tourism Communities to Support Visitor Services and Infrastructure Requirements. Alberta Municipal Government Act Submission.
- Municipality of Jasper, Town of Banff, Town of Canmore (2014b). Alberta Tourism Communities – Core Assets Building Alberta's Tourism Economy. AUMA – Government of Alberta Meeting Briefing Note.
- Union of BC Municipalities (2013) Strong Fiscal Futures: A Blueprint for Strengthening BC Local Governments' Financial System. Prepared for the Select Committee on Local Government Finance.
- Western Management Consultants (2010) Review: Tourism Destination Marketing Fee Structures in Alberta. Prepared for the Alberta Hotel and Lodging Association.



## APPENDIX THREE: BC RESORT MUNICIPALITY TOURISM ASSET AND FUNCTION TYPOLOGY

The asset and function typology below was developed from the list of tourism community capital projects and services defined in the BC Resort Municipality Initiative (Gov't of BC , 2011). The section on public works and utility infrastructure was added to their list.

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**A. TOURISM COMMUNITY INFRASTRUCTURE****1. Arts and Culture**

- Murals
- Heritage Conservation
- Galleries
- Museums
- Performing Arts Theatres
- Community Halls (where larger groups can be offered meeting places)

**2. Visitor Development**

- Convention Centres
- Travel Information Centres
- Wharves,
- Docks and Piers

**3. Parks and Recreation**

- Green Space
- Trails
- Beaches
- Public Meeting Areas
- Municipal Campgrounds
- Performance Training Facilities
- Municipal Golf Courses

**4. Transportation Infrastructure and Streetscapes**

- Signage (directional, heritage and trail networks)
- Travel Corridors (pathways, sidewalks, and multi-use trails)
- Streetscape Improvements (street lights, benches, and pedestrian friendly areas)
- Parking (e.g., recreational vehicle, boat trailer, public facilities)
- Shuttle infrastructure

**5. Public Works and Utilities Infrastructure**

- Roads
- Water
- Sewage disposal systems
- Electricity
- Gas
- Telephone lines/ Cable

- Landfill
- 6. **Employee Housing**
- 7. **Other**
  - Other projects with demonstrable impacts on the tourism economy

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## B. TOURISM COMMUNITY SERVICES

### C. Visitor Programs

- Adventure Programs
  - Art and Culture Tours
  - Good Host Programs
  - Other
2. **Community Events**
- Festivals (i.e Wildlife, Mountain, Film, Music, Snowmobiles or Wine)
  - Artisan Markets
  - Collector Car Shows
  - Conferences
  - Other

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## C. OPERATIONS/MAINTENANCE

1. **Marketing**
- Destination Marketing Organization
2. **Maintenance of Tourism Community Infrastructure**

APPENDIX FOUR: TOURISM COMMUNITY SERVICE METRICS ANALYSIS

Community Core Services						
Core Service	Metric	Potential Source	Tourism Data Relevance Strong / Medium / Weak	Data Available	Effort to Locate Comparable Data High / Medium / Low	Data Located
Wastewater	<ul style="list-style-type: none"> <li>•M3/day waste water treatment capacity</li> <li>•M3/day waste water Demand</li> </ul>	<ul style="list-style-type: none"> <li>•Municipality Interviews</li> <li>•Master Utility Plans</li> </ul>	<p><b>Strong</b></p> <p>Increase tourist population should increase demand on the wastewater system.</p>	Yes	Medium	Through Survey
Water	<ul style="list-style-type: none"> <li>•M3/day Water Supply Capacity</li> <li>•M3/day Water produced Demand</li> </ul>	<ul style="list-style-type: none"> <li>•Municipality Interviews</li> <li>•Master Utility Plans</li> </ul>	<p><b>Strong</b></p> <p>Increase tourist population should increase demand on the water supply.</p>	Yes	Medium	Through Survey
Roads	<ul style="list-style-type: none"> <li>•Kilometers of roads</li> </ul>	<ul style="list-style-type: none"> <li>•Municipality Interviews</li> <li>•Transportation Master Plans</li> </ul>	<p><b>Weak</b></p> <p>Road infrastructure capacities hard to correlate with tourist use.</p>	Yes/No	Low	Canmore Only
Solid Waste	<ul style="list-style-type: none"> <li>•M3 landfill capacity</li> <li>•M3/day landfill use</li> <li>•Tonnes</li> <li>•Combined residential and commercial. Differs by community?</li> </ul>	<ul style="list-style-type: none"> <li>•Municipal &amp; Private landfill company Interviews</li> <li>•Banff and Canmore ship to Calgary</li> <li>•Waste Management companies</li> </ul>	<p><b>Medium</b></p> <p>Increase tourist population should increase landfill demand. Many communities use regional landfills</p>	Yes/No	High	No
Police	<ul style="list-style-type: none"> <li>•Number of service</li> </ul>	<ul style="list-style-type: none"> <li>•Statistics Canada</li> </ul>	<p><b>Medium</b></p>	Yes	High	•No service

	calls •Number of police officers	•RCMP •Not part of the survey	Tourist communities should see high service calls due to a more transient tourist population.			call data •Located Number of police offers
<b>Fire</b>	•Number of service calls •Number of firemen •K Division has it	•Municipal Interviews	<b>Unknown.</b>	Unable to determine	High	No
<b>Secondary Community Services</b>						
<b>Core Service</b>	<b>Metric</b>	<b>Potential Source</b>	<b>Data Relevance Strong / Medium / Low</b>	<b>Data Available</b>	<b>Effort to Locate Comparable Data High / Medium / Low</b>	<b>Data Located</b>
<b>Transit</b>	•* Transit	•Municipality Interviews •Transit Planning Documents •Milnet Data (transit spending only) •Yes/no and \$	<b>Strong</b>  Tourist communities should offer more transit services than comparable communities.	Yes	High	Through Survey
<b>Wayfinding</b>	•Wayfinding budget/population •Asset value (inside tangible capital asset system)	•Municipal Interviews •Review of 2012 budget documents •Capital initiative •Yes/No – in operating or capital plan?	<b>Weak</b>  Tourist communities should spend more on wayfinding than comparable communities. Hard to distinguish costs in Municipal budgets	Unknown	High	No
<b>Marketing</b>	•Marketing budget/population	•Municipal Interviews •Review of 2012 budget	<b>Strong</b>	Not for all	High	Through

		<p>documents</p> <ul style="list-style-type: none"> <li>• Designated Marketing Organizations</li> <li>• Yes/No DMO – not funded by tax or licensing \$</li> <li>• Banff \$4million to marketing from business licensing</li> <li>• Canmore \$500k/yr, from licensing to economic development</li> </ul>	<p>Tourist communities should spend more on marketing than comparable communities.</p>	communities		Survey
<b>Housing *</b>	<ul style="list-style-type: none"> <li>• Affordable/ employee housing. Employees of the community</li> <li>• housing budget/ population</li> <li>• # of housing units</li> <li>• Not seniors</li> <li>• Employee Housing</li> <li>• Affordable Housing</li> </ul>	<ul style="list-style-type: none"> <li>• Municipal Interviews</li> <li>• Review of housing agencies</li> <li>• Asset value size of affordable housing</li> <li>• Yes/no as well</li> <li>• Operating costs</li> <li>• Units</li> <li>• Approach/ types of housing assistance</li> </ul>	<p><b>Strong</b></p> <p>Results may be mixed as tourist communities may spend more on employee housing, but less on more typical affordable housing.</p>	Yes	High	Through Survey
<b>Recreation</b>	<ul style="list-style-type: none"> <li>• Recreation budget/ population</li> <li>• Recreation facility attendance</li> </ul>	<ul style="list-style-type: none"> <li>• Municipal Interviews</li> <li>• Review of recreation agencies</li> <li>• Milenet Data (recreation spending only)</li> <li>• Operational recreational budget</li> </ul>	<p><b>Weak – hard to measure</b></p> <p>Tourist communities should spend more on recreation and have higher recreation use than comparable communities.</p>	Yes	High	No
<b>Parking</b>	<ul style="list-style-type: none"> <li>• Number of public stalls</li> <li>• Number of revenues</li> <li>• Parkade Y/N</li> </ul>	<ul style="list-style-type: none"> <li>• Municipal interviews</li> </ul>	<p><b>Strong</b></p> <p>Tourist communities will need more parking.</p>	Yes	Medium	Through Survey

**Welcome to the Alberta Tourism Communities Survey**

The Alberta Tourism Communities Survey has been designed to develop an understanding of the unique community service demands of tourism communities and communities of a similar size.

This survey asks municipalities about the availability, capacities and demands for the following services:

- \* Wastewater
- \* Water
- \* Transit
- \* Marketing
- \* Housing
- \* Parking

We are working with 2013 information for comparison purposes. Please use this year if possible.

**Address**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/Town: \_\_\_\_\_  
 Postal Code: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_

**Wastewater Services**

The questions below aim to determine the treatment capacity and wastewater demand in your community.

1. Please provide your 2013 wastewater treatment information below.
  - a) Municipal Waste Water Peak Flow Treatment Capacity (total mega litres per day): \_\_\_\_\_
  - b) Peak Municipal Wastewater Demand (total mega litres per day): \_\_\_\_\_
  - c) Average Annual Wastewater Demand (total mega litres per day): \_\_\_\_\_
  - d) Peak Municipal Wastewater Demand (highest demand month of year): \_\_\_\_\_

**Water Services**

The questions below aim to determine water service capacity and demand in your community.

2. Please provide your 2013 Water Services information below
  - a) Water Service Supply Capacity (total mega litres per day): \_\_\_\_\_
  - b) Maximum Peak Demand Water Service Supply (total mega litres per day): \_\_\_\_\_
  - c) Average Daily Demand Water Service Supply (total mega litres per day): \_\_\_\_\_
  - d) Peak Demand Water Service Supply (peak demand Month of Year): \_\_\_\_\_
  - e) Peak Hour Demand Water Service Supply (typical peak Hour of the Day (i.e. 7am)): \_\_\_\_\_

**Transit Services**

These questions aim to determine the availability and levels of transit service available in your Municipality. Please provide your transit services information below.

3. Do you have a Municipal Transit Service?

- Yes  No
- Other (Please Specify) \_\_\_\_\_

4. How many hours of Transit Service did your Municipality provide in 2013? \_\_\_\_\_

5. What was your 2013 annual budget for transit services? \_\_\_\_\_

**Marketing Services**

The questions below aim to determine the extent to which the Municipality contributes to community tourism marketing

6. Does your Municipality have a Designated Marketing and/or Economic Development Organization?

- Yes  No
- Other (Please Specify) \_\_\_\_\_

7. Does your Municipality provide tourism industry focused tax or licencing revenue to a Designated Marketing Organization or an Economic Development Organization?

- Yes  No
- Other (Please Specify) \_\_\_\_\_

8. Please describe the types of tourism industry revenue tools or support you provided to your Designated Marketing and/or Economic Development Organization in 2013.

a) Designated Tax Source (please describe type and dollar value):

\_\_\_\_\_  
\_\_\_\_\_

b) Designated Licencing source (please describe type and dollar value):

\_\_\_\_\_  
\_\_\_\_\_

c) Other funding source (please describe type and dollar value):

\_\_\_\_\_  
\_\_\_\_\_

## Housing

The questions below aim to determine the unique housing services your Municipality supports related to economic development.

9. 10. Does your municipality provide forms of housing support related to employee or affordable housing (other than seniors housing)?
- Yes  No
10. If yes, what types of housing do you provide?
- Affordable Housing  
 Other Housing (not including seniors housing)  
 Other (Please Specify) \_\_\_\_\_
11. Please describe the nature of your housing assistance in 2013
- a) What is the Asset Value of your Affordable Housing Portfolio? \_\_\_\_\_  
b) How many owned Affordable Housing units do you provide? \_\_\_\_\_  
c) How many Affordable Housing units do you provide through rental assistance? \_\_\_\_\_  
d) What is the operating budget for your Affordable Housing program? \_\_\_\_\_  
e) What other forms of housing assistance do you provide? \_\_\_\_\_

## Parking

The questions below aim to determine the level of parking services that your Municipality provides

12. Please provide your 2013 general public parking information below
- a) How many parkade structures does your municipality maintain? \_\_\_\_\_  
b) How many stalls in parkade structure does your municipality maintain? \_\_\_\_\_  
c) How many offstreet surface parking lots does your municipality maintain? \_\_\_\_\_  
d) How many stalls in offstreet surface parking lots does your municipality maintain? \_\_\_\_\_  
e) What are your annual parking revenues? \_\_\_\_\_

## Annual Visitor Count

These questions aim to compare annual community visitor counts, where information is available

13. Does your community collect the number of annual visitors?
- Yes  No
- Other (Please Specify) \_\_\_\_\_

14. What was your communities' 2013 annual visitor count? \_\_\_\_\_

## Thank You

Thank you for your participation in this survey. We will share the results with you once we have had a chance to collect and collate the results.



APPENDIX SIX: SURVEY COMMUNITIES

A summary of the communities identified and responses for the survey are provided in the table below along with their population.

STATUS	CODE	MUNICIPALITY	2013 POPULATION	SURVEY RESPONSE
<b>Tourism Communities</b>				
S/ Municipality	0418	JASPER	5236	Yes
Town	0387	BANFF	8244	Yes
Town	0050	CANMORE	12317	Yes
<b>Comparison Communities</b>				
City	0043	BROOKS	13676	No
City	0347	WETASKIWIN	12525	No
S/ Municipality	0361	CROWSNEST PASS	5565	Yes
Town	0019	BEAUMONT	14,916	Yes
Town	0035	BONNYVILLE	6,837	No
Town	0086	DEVON	6,510	Yes
Town	0532	DRUMHELLER	8029	No
Town	0100	EDSON	8646	Yes
Town	0146	HIGH LEVEL	3641	No
Town	0239	OLDS	8511	Yes
Town	0148	HIGH RIVER	12920	No
Town	0303	STRATHMORE	12352	No
Town	0298	STETTLER	5748	Yes
Town	0310	SYLVAN LAKE	13015	No
Averages		Average of 6 Comparison Communities	8,316	
		Average of 3 Study Communities	8,599	
Response Rate		Comparison Community Response		43%
		Study Community Response Rate		100%
		Total Response Rate		53%

## APPENDIX SEVEN: TOURISM COMMUNITY SURVEY DATA

Appendix Seven is available as a separate document.

