



# Canmore Kananaskis Community Tourism Strategic Plan 2019-2029

Final: April 5, 2019

**expedition**  
MANAGEMENT CONSULTING

April 5, 2019

Dave Rodney, Executive Director  
Tourism Canmore Kananaskis  
Box 8608  
Canmore, Alberta, T1W 1P4

Dear Mr. Rodney:

Please find enclosed the final Canmore Kananaskis Community Tourism Strategic Plan. We were pleased to work with you and the Community in developing this important document. This plan signifies the beginning of an exciting journey for the region and we look forward to learning about your success in the coming years.

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

Sincerely,



Justin Rousseau, Managing Director  
Expedition Management Consulting Ltd.

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# Executive Summary

## Executive Summary

What makes Canmore Kananaskis unique is that it offers an authentic mountain town experience and vast wilderness that is in close proximity to internationally known attractions, an international airport and a large regional market. No other Alberta destination has this unique combination. 2019 is a watershed year as we embark upon the journey of re-focussing our brand, aligning our efforts and delivering life changing visitor experiences. We welcome all to be part of our exciting new vision!

## Compelling Reason for Change

Canmore Kananaskis is at a crossroads. The region is already busy during peak visitation months, yet businesses struggle during the shoulder and off seasons to generate revenue and keep qualified staff. Growth in visitation is likely inevitable, so there is a need for a cohesive plan to deal with it. In order to retain its authenticity and maintain its attractiveness to visitors and residents, Canmore Kananaskis must act now to shape the future. There needs to be a purposeful and deliberate effort on the part of the community and businesses to find common ground and work toward a shared vision for tourism. Failure to take action and work collaboratively could result in over tourism and degradation of the core value proposition of the community. The impacts of this could include decreased quality of life for residents, negative environmental impacts and reduced viability for tourism businesses. If the region chooses to act proactively, it has an immense opportunity to become an iconic, internationally known destination and a leader in sustainable tourism development.

## Vision for Tourism in Canmore Kananaskis

**5 Year Vision – Together, we will be implementing a highly successful sustainable tourism program that will have captured the imagination of visitors and stakeholders.**

*By 2024, Canmore Kananaskis will be fully committed to a triple bottom line approach to tourism development and this will be well received by visitors. A high degree of trust will have been built up between stakeholders and several high priority sustainable tourism development goals will have been achieved.*

**10 Year Vision – We will be seen as a leader in sustainable tourism development!**

*By 2029, Canmore Kananaskis will be seen as a leader in sustainable tourism development and visitors will be fully engaged in the brand. All stakeholders will be working as one cohesive unit and enjoying the rewards of a destination that has truly embraced a triple bottom line approach including high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.*

# The Path to Sustainable Tourism Development in Canmore Kananaskis

Through the community tourism strategic planning process, it became clear that various segments of the community have very different views about how to shape tourism development in the future. What also became clear is that there is widespread agreement on the need for a sustainable approach. But what does that mean? Who owns it? What are the real benefits?

Sustainability will be achieved by committing to the triple bottom line approach as a way to guide tourism development in Canmore Kananaskis over the next ten years. The triple bottom line approach considers economic, environmental and social factors to develop a more holistic accounting of sustainability. The approach is the backbone of the vision and will be the fibre that holds together a strong and unifying strategic plan.

*The Triple Bottom Line Approach is the backbone of the vision and will be the fibre that holds together a strong and unifying strategic plan.*

For a sustainable system to work, everyone needs to see themselves in it and all key players will be called upon to steer toward this common goal. Why will everyone do this? The simple answer is because all will benefit. All have a vested interest in driving towards sustainability because there is inherent economic, social and environmental benefit in it. The following describes how each segment of the community will participate and benefit from embracing this vision.



**Triple Bottom Line Approach**

## Visitors

Visitors will play a central role in realizing the potential of the vision. We know from our research that current customers of the region are a thoughtful, well-educated and affluent group that values authentic experiences. It is expected that this segment would pay a premium to visit a destination that truly embraces sustainability. There needs to be a focused effort on developing sustainable nature-based product, sustainability measures and methods to promote sustainable visitor behaviour. It is critical that the visitor feels part of the movement and actively participates in its realization.

## Businesses

Businesses could stand to benefit greatly from adopting a triple bottom line approach. If developed in the right way, sustainability initiatives can reduce operational costs and drive revenue. Embracing this philosophy can also help attract highly skilled and motivated workers that are mission-driven. A successful sustainability program can also be used as a selling tool to promote the destination year-round as a central part of the brand. Recognition gained from the program can be further leveraged to gain valuable earned media exposure.

## Residents

The community engagement process identified sustainability as a major issue. The triple bottom line approach was tested with the public and received significant support. Residents will play an active role in welcoming visitors, championing the strategy in the community and will be important brand advocates moving forward.

## Governments

On a daily basis, governments have the difficult job of balancing economic, social and environmental interests. It is anticipated that if Canmore Kananaskis was successful in embracing a triple bottom line approach, the job of governing would be made easier. Governments are much more likely to invest in communities that cooperate vs. compete, therefore if the region brought forward a thoughtful, logical and coordinated triple bottom line approach, it is expected that governments would react favourably.

## NGO's

There are many groups operating in the region, each with a specific mandate to fulfill. It is anticipated that the vast majority of groups will embrace and actively participate in bringing this new vision to life.

## Establishment and Measurement of Sustainability Initiatives

An important early action item identified in this plan is the establishment of a sustainable tourism program. During this process, specific sustainability initiatives will be developed, and key performance indicators will be established.

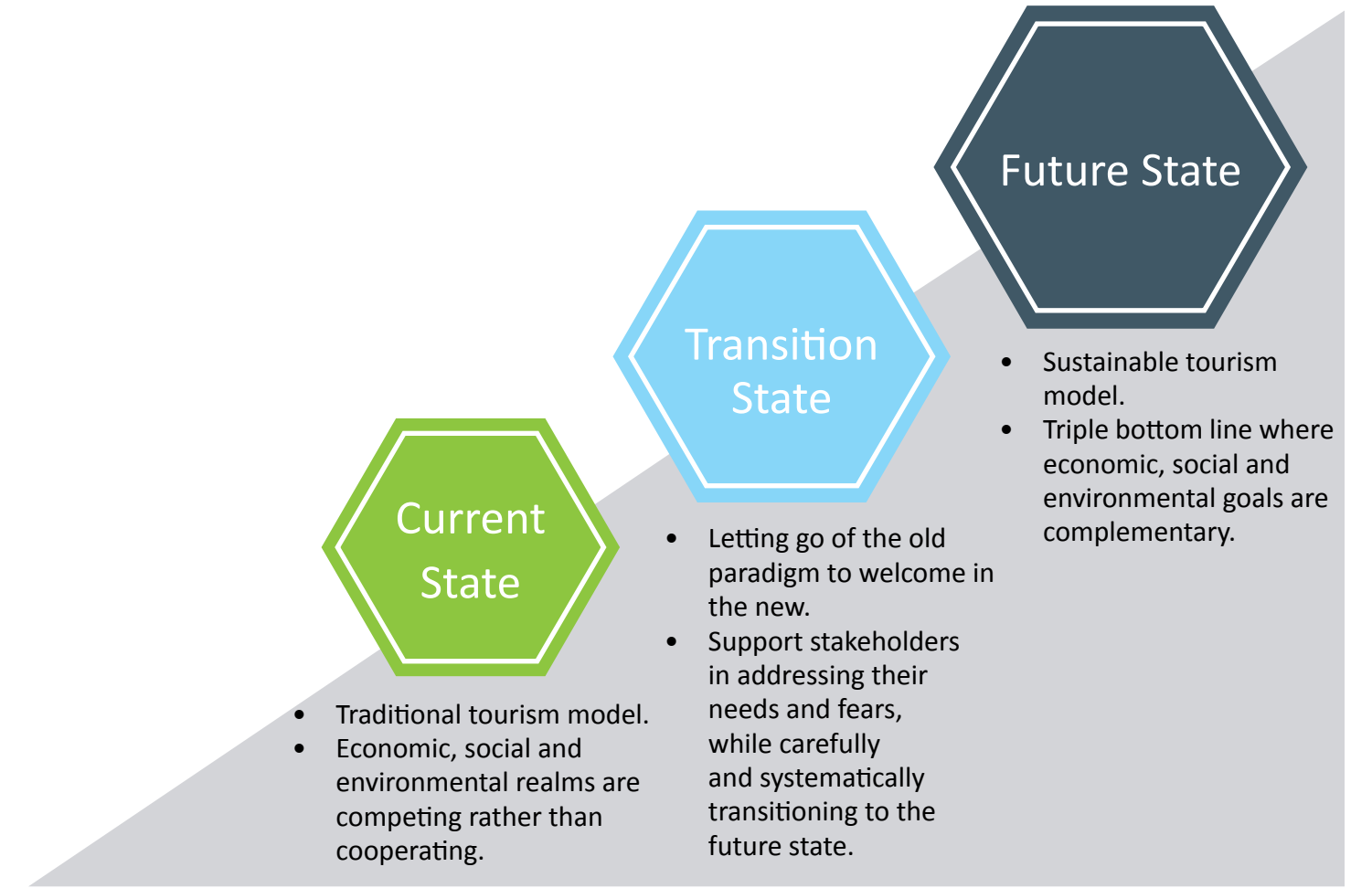


## Overview of the Change

Change will be widespread and impact many stakeholders. There is a desire for change from the community at large and if the change is successful this will have considerable benefit for thousands of individuals, including residents, visitors, industry employees, business owners and investors. In order to encourage change, a clear path forward is needed.

The figure below describes transitioning from a traditional tourism model to a sustainable tourism model.

### States of Change



## Goals

# 1

*Acknowledge the importance of tourism in our community and commit to becoming proactive in its development.*

At the present time, there are some in the community that do not fully realize the impact that tourism has on the destination. The tourism economic impact analysis completed by the Town clearly identifies the economic value of this industry and the social opportunities and challenges are apparent in the daily lives of residents. Community leaders should make a strong statement declaring the importance of the industry and back it up with concrete and proactive action.

*Build community-wide trust, collaboration, engagement and accountability in order to strengthen the social infrastructure supporting tourism.*

# 2

Due to a variety of historical factors, there may be a lack of trust among some organizations and individuals in the community. At the core of this may be the belief among some that corporations are in Canmore and Kananaskis to generate wealth at the expense of quality of life for residents. However, through the consultation process it became apparent that there is considerable common ground among all parties. Generally, corporations, residents and governments would like to see a sustainable framework in place that would encourage long term prosperity, high quality of life and environmental stewardship. Tourism Canmore Kananaskis and its partners will need to work hard to build trust and understanding for a new framework to succeed.

# 3

*Create a sustainable framework for tourism development that will ensure long term economic, social and environmental viability.*

As identified through the strategic planning process, there appears to be widespread agreement that sustainability is of critical importance to the success of the strategy. Community members support the triple bottom line approach that seeks common ground among its three pillars (social, environmental, economic). All solutions proposed need to consider the short, medium and long term impact on sustainability.

# 4

*Develop and promote outstanding visitor experiences that will position Canmore Kananaskis as a destination of choice for those who seek to immerse themselves in our authentic mountain lifestyle and vast wilderness.*

The tourism industry in Canmore Kananaskis operated without an established DMO from 2016 to 2018. That said, the destination has remained busy during the high summer season. Promoting the region's outstanding visitor experiences and developing new, niche products focused on the shoulder seasons will ensure Canmore Kananaskis becomes a destination of choice for travellers seeking an authentic mountain experience throughout the year.

# 5

*Improve the physical infrastructure of Canmore and Kananaskis to enhance visitor experience, prepare for growth and improve quality of life for residents.*

Input from the community engagement process indicated a high degree of concern over the effects of tourism on municipal infrastructure. Congestion and infrastructure pressure will only increase as visitation increases; therefore, it is critical that action is taken to protect and enhance Canmore and Kananaskis' infrastructure.



# Target Markets for Canmore Kananaskis

Taking into account detailed visitor data found in this plan, and considering what inspires travel to Canmore Kananaskis, the following target markets will be the focus moving forward.

## Domestic Target Market

Authentic Experiencers from Alberta and other parts of Canada who embrace the authentic mountain town experience and vast wilderness that Canmore Kananaskis has to offer.

## International Target Market

Authentic Experiencers and Free Spirits from the United States and overseas who embrace the authentic mountain town experience and vast wilderness that Canmore Kananaskis has to offer.



# Experience Development Focus Moving Forward

It is very clear from the market data and asset inventory analysis that there is a strong product/market match with several core niche products. Topping the list is nature-based activities. As outlined in the strategy section, visitors have a critical role to play in participating in activities that support a sustainable approach. Canmore Kananaskis should actively pursue the development of unique visitor experiences that will facilitate a powerful connection between the visitor and nature. These experiences need to further connect the visitor to the sustainability efforts of the destination. The offering should include a mix of experiences that appeal to a wide range of ability levels. Visitors should feel equally involved whether they are comfortable scaling a mountain to learn about the flora and fauna of the region or if they choose in-resort experiential activities to connect with nature.

*Canmore Kananaskis should actively pursue the development of unique visitor experiences that will facilitate a powerful connection between the visitor and nature. These experiences need to further connect the visitor to the sustainability efforts of the destination.*

Other product lines important to target markets and that align well with Canmore Kananaskis include the MICE sector (meetings, incentives, conferences and exhibitions), culture/history, culinary/shopping, sport, and health/wellness. It should be noted that for Authentic Experiencers, travel is not necessarily about escape but instead about personal development and learning. For this reason, all product lines should include experiential/learning components.

## Top Experiences for Development

- 1. Nature and sustainability
  - 2. MICE
  - 3. Culture/history
  - 4. Culinary/shopping
  - 5. Sport
  - 6. Health/wellness
- } Experiential/Learning Focus

# Strategy for Tourism Marketing

Canmore Kananaskis will employ a market penetration strategy for its domestic market and a market development strategy for its international market. Market penetration focuses on deeper engagement of existing markets through the provision of existing product. Market development entails marketing existing products to market segments that are currently not highly engaged. The following points support this.

## Market Penetration (Domestic Focus)

- A. **Strong Existing Markets** – Edmonton, Calgary, Red Deer and their surrounding areas represent over half of Alberta’s population (more than 2.5 million people), and they are already engaged by the product offering in Canmore Kananaskis. Creating a deeper connection with this highly educated, affluent customer base will be important. In addition, furthering relationships with other Canadian markets will also be important.
- B. **Strong Existing Products** – Canmore Kananaskis offers an outstanding tourism product that strongly resonates with Canada’s Authentic Experiencers. Communicating the story of Canmore Kananaskis and marketing the destination’s compelling tourism product to target markets is a high priority.
- C. **Need for Increased Visitation in the Shoulder and Off-Seasons** – Canmore Kananaskis has expressed a need for increased visitation in the shoulder and off-seasons. The destination’s domestic market is currently highly engaged by the available product and travels to Canmore Kananaskis regularly throughout the year. Building upon this year-round interest in the destination will be important to satisfying this need.

## Market Development (International Focus)

- A. **High Value Markets** – On average, international visitors spend twice as much as domestic visitors in the Canadian Rockies (on a per person per night basis) and account for 50% of total visitor spending. Attracting this market during the need times of shoulder and off-seasons is a focus of the strategy.





## Implementation

The strategy proposes the following guiding principle for implementation and identifies roles in implementation.

### Guiding Principle for Implementation

*We will work together collaboratively with a sense of cooperation versus competition. We will communicate openly and honestly and be accountable to each other. Together we can realize our shared vision for tourism.*

### Roles

**Tourism Canmore Kananaskis** – Takes the lead role in ensuring the strategy is moving forward in the most effective and cohesive manner. TCK is a renewed organization that is customer centric, inclusive and focussed on providing value for members and the community. TCK is committed to a destination management approach that considers tourism as an integrated and wholistic system that affects every aspect of the community.

**Town of Canmore** – A strong partner in ensuring the strategy is moving forward in the most effective and cohesive manner. The Town will partner in modeling the destination management approach and will play an integral role in implementation. The Town may also contribute to project-based or operational funding to support the plan.

**Tourism Round Table (Existing Advisory Committee)** – The Tourism Round Table is a multi-stakeholder group that acts as a forum for consistent communication, collaboration and idea sharing related to the development of the strategy. It will be important for this group to engage representatives from each pillar of sustainability (environmental, social and economic).

## Action Plan

The Action Plan identifies a series of specific initiatives that will assist Canmore Kananaskis in achieving its 5 and 10 year vision. Concerted effort will be required from the business community, governments, NGO's, residents and visitors to achieve the goals put forward by this strategic plan. If you are inspired by the vision and would like to contribute to implementation, please contact Tourism Canmore Kananaskis to get involved. The top 10 short term priority items for implementation include:

1. Obtain formal motions from the TCK Board and the Town of Canmore to move forward with the Strategy as a core planning document.
2. Initiate a work plan for the strategy and begin implementation.
3. Implement the TCK Business Plan.
4. Gain support for the strategy.
5. Secure project funding to launch key initiatives.
6. Add human resources to implement the strategy.
7. Develop a sustainable tourism program and business case for sustainable tourism.
8. Increase the knowledge and capacity of tourism stakeholders in regards to sustainability.
9. Implement a sustainable funding model for TCK.
10. Communicate the value proposition of the destination and of TCK to visitors and potential members.

## Funding the Plan

The plan will be funded from a variety of sources including voluntary membership contributions, fee-for-service and grant funding.

## Business and Operations Plans (Associated Documents)

As part of the overall process, Business and Operations Plans for Tourism Canmore Kananaskis were developed under separate cover. The Business Plan is a foundational document for Tourism Canmore Kananaskis. It describes who the organization is, what services it provides, the value proposition of the organization, the marketing strategy, goals and key performance indicators. The Operations Plan is a key internal document that describes the organization's Board structure, departmental functions and funding model.

## Conclusion

The Canmore Kananaskis Community Tourism Strategic Plan lays out a strategic direction that will advance the Destination toward its bold vision to become a leader in sustainable tourism development. There is much work to be done to align efforts and tackle challenges; however, the Region is in a position of strength with outstanding tourism product, engaged markets, a strategic location and energized stakeholder groups. By coming together as a team and committing to a triple bottom line approach, the future will include a high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.





# Project Overview 01

## Community Overview

Located in the Rocky Mountains, Canmore Kananaskis has stunning mountain vistas and a host of unique attractions that offer visitors an authentic mountain experience in a beautiful natural environment. In order for Canmore Kananaskis to continue to be a sought-after destination, there is a growing need for aligned stakeholders to take on the challenges facing the community and its tourism industry. This need has initiated a process to develop a community tourism strategy and to complete a business plan that will help grow Tourism Canmore Kananaskis (TCK) as an essential organization in destination management.

## Project Objective

The objective of the Canmore Kananaskis Community Tourism Strategic Plan is twofold:

1. To develop a comprehensive Community Tourism Strategic Plan that will create a shared vision and provide clear direction for moving the destination towards its goals.
2. The re-establishment of a sustainable Destination Management Organization in Canmore Kananaskis.

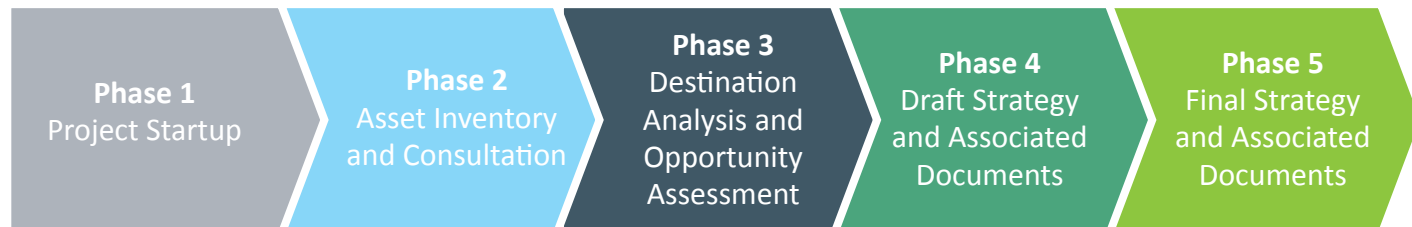
# Project Team Members

The Project Steering Committee was established to oversee the project and provide inspiration for the development of a shared vision for tourism in Canmore Kananaskis. Below is a list of Steering Committee representatives.

Project Steering Committee	
Organization	Representatives (in alphabetical order)
Committee Members	<p>Andrew Shepherd – Chair, Tourism Canmore Kananaskis; General Manager, The Malcolm Hotel</p> <p>Ashley Kalk – Tourism Development Officer – Product Development, Tourism and Recreation Division, Alberta Culture and Tourism</p> <p>Cameron Spence – Manager, Experience Development, Travel Alberta</p> <p>Dave Rodney – Executive Director, Tourism Canmore Kananaskis</p> <p>Eleanor Miclette – Manager of Economic Development, Town of Canmore</p> <p>Karen Fennell – Marketing Manager, Tourism Canmore Kananaskis</p> <p>Rob Seeley – Councillor, Town of Canmore</p>
Consultant Team	<p>Justin Rousseau – Expedition Management Consulting Ltd.</p> <p>Maxwell Harrison – Expedition Management Consulting Ltd.</p>

# Process

The Canmore Kananaskis Community Tourism Strategy project included five, interconnected phases as described below.



# Business and Operations Plans (Associated Documents)

As part of the overall process, Business and Operations Plans for Tourism Canmore Kananaskis were developed under separate cover. The Business Plan is a foundational document for Tourism Canmore Kananaskis. It describes who the organization is, what services it provides, the value proposition of the organization, the marketing strategy, goals and key performance indicators. The Operations Plan is a key internal document that describes the organization’s Board structure, departmental functions and funding model.

# Overview of Research

A variety of primary and secondary research activities were conducted to develop the plan. Secondary research was gathered from the Town of Canmore, Travel Alberta, Alberta Culture and Tourism, Alberta Parks and other sources. Primary research was gathered through an online survey of residents and stakeholders, one-on-one interviews and in-person input sessions.

## A. Interviews Conducted:

1. Town of Canmore – Mayor John Borrowman
2. Town of Canmore – Lisa De Soto
3. Town of Canmore – Eleanor Miclette
4. Canmore Hotel and Lodging Association – Andrew Shepherd
5. Canmore Business Improvement Area – Beth Vandervoort
6. Bow Valley Chamber of Commerce – Janet Nystedt
7. BOWDA – Ron Rempel
8. Alberta World Cup – Norbert Meier
9. Kananaskis Outfitters – Claude Faerden
10. Uncorked Experiences Ltd. – Andrew Nickerson
11. Canmore Nordic Centre – Michael Roycroft
12. Rocky Mountain Outlook – Tanya Foubert (invited)
13. Tourism Canmore Kananaskis – Dave Rodney
14. Tourism Canmore Kananaskis – Karen Fennell
15. Stoney Nakoda First Nations – (invited)
16. Kananaskis Improvement District - Kieran Dowling
17. Municipal District of Bighorn – Martin Buckley
18. Travel Alberta – Royce Chwin
19. Travel Alberta – Cameron Spence
20. Banff Lake Louise Hospitality Association – Darren Reeder
21. Banff Lake Louise Tourism – Leslie Bruce
22. Tourism Jasper – James Jackson
23. Tourism Lethbridge – William Slenders
24. Tourism Calgary – Marilyn Bell

25. Alberta Parks – Debbie Mucha
26. Alberta Parks – Mark Storie (invited)
27. Alberta Culture and Tourism – Chris Heseltine
28. Alberta Culture and Tourism – Roger Kramers
29. Tourism Impact Services – Robert Chappell
30. Green Step Solutions – Angela Nagy

**B. Meetings Conducted:**

1. Committee Meeting #1  
Date: September 26, 2018  
Purpose: Establish goals and priorities for the project.
2. Public Workshops #1 and #2  
Date: November 1, 2018  
Purpose: Inform the public and stakeholders of the process, gain input on opportunities and challenges, gain input on a future vision for tourism development.
3. Public Workshops #3 and #4  
Date: November 28, 2018  
Purpose: Collect public and stakeholder feedback on the key themes identified from the first Tourism Strategy Workshop. Discuss function of TCK.
4. Committee Meeting #2  
Date: January 23, 2019  
Purpose: Review the Preliminary Options Report
5. Committee Meeting #3  
Date: February 22, 2019  
Purpose: Review the Draft Strategy and Associated Documents
6. Public Workshop #5  
Date: March 13, 2019  
Purpose: Review the Draft Strategy
7. Canmore Town Council Presentation  
Date: March 19, 2019  
Purpose: Review the Draft Strategy

**C. Surveys Administered:**

1. Canmore Kananaskis Community Tourism Strategy Survey (N = 187)

**D. Documents Reviewed:**

1. Strategies, business plans and other documents from Tourism Canmore Kananaskis
2. Strategies, business plans, budgets and bylaws from comparative DMO's
3. Tourism research and visitation statistics from Alberta Culture and Tourism and other provincial sources
4. Internal planning documents from stakeholders

See Appendix D for a detailed list of resources.



*Internal Analysis* **02**



Canmore Kananaskis is known for its outstanding mountain scenery, world-class outdoor opportunities, boutique shops, local restaurants and cafes, and expansive wilderness; all just one hour west of Calgary. The region combines two distinct areas: Canmore and Kananaskis Country.

## Canmore

Canmore is where visitors come to “live” the mountain lifestyle residents enjoy every day. It is home to Olympic athletes, accomplished mountaineers, artists, entrepreneurs, and people from all walks of life. Located just over 90 km west of Calgary and 25 km east of Banff, Canmore offers tremendous access to the Canadian Rockies.<sup>1</sup>

Tourism is the key industry in Canmore. While the sector is responsible for many social and economic benefits, tourism also presents challenges. In recognition of this, the Town of Canmore collaborated with the municipalities of Banff and Jasper on an economic impact study of the three tourism communities that make up Alberta’s Canadian Rockies destinations. The study estimated that in 2015 Canmore generated an estimated \$344.9 million in tourism expenditures. 31% was spent on food and beverage, followed by 25% on accommodation. Over 5,000 Albertans had permanent jobs as a result of these tourism expenditures in Canmore, generating over \$200 million in wages and salaries. Most of these jobs were in Canmore, making tourism a top employer in the community (e.g. employment in accommodation, trades, other services, travel and entertainment, and transport). The total tax impact of tourism in Canmore was approximately \$164 million (\$105 million to the federal government; \$54.1 million to the province, and \$4.9 million to local governments).<sup>2</sup>



## Kananaskis Country

Kananaskis Country is 4,000 km<sup>2</sup> of wildlands and has long been regarded as Calgary’s backyard. Kananaskis includes nine provincial parks and over 50 recreation, wilderness and natural areas that are part of the Alberta’s parks and protected area system. It has world-class golf courses, an Olympic alpine ski resort, an Olympic Nordic Centre, and Kananaskis Village boasts outstanding hotels, spas and shops.<sup>3</sup> The Kananaskis Improvement District (KID) fills the role of Sustainable Development Authority for Kananaskis Country. KID is also responsible for providing municipal services to the area’s residents.

The Alberta government commissioned a study to estimate the economic impact of tourism in Kananaskis Country prior to the flood in 2013 that damaged infrastructure and tourism assets, including the Kananaskis Country Golf Course. The study estimated over 1.1 million visits to Kananaskis Country in 2011. Kananaskis generated \$194.2 million in tourism expenditures, which were primarily spent on accommodation, followed by food and beverage, then private auto. There were over 3,000 full-time equivalent jobs as a result of tourism expenditures in Kananaskis Country; generating over \$125.4 million in wages and salaries. The total tax revenue in 2011 at all three levels of government was estimated at \$117.2 million.<sup>4</sup>

Canmore Kananaskis draws millions of visitors annually and the population of Canmore continues to grow with new residential and vacation home developments. There are a number of challenges the region must face as it readies for the expected growth.

# Challenges Facing Tourism Development in Canmore Kananaskis

Challenges facing tourism development in Canmore Kananaskis are centered around six main themes including funding a tourism community, affordable housing, urban development, access, environmental impacts and a collective vision for the future.

## Funding a Tourism Community

The Town of Canmore serves a permanent population of approximately 14,000 residents and a non-permanent population of 3,890.<sup>5</sup> However, basic municipal services like water, wastewater, transit, parking and urban infrastructure support an effective population 68% higher than the permanent population. This means the municipality delivers basic services to an effective population of 23,500 on a tax base of only 14,000.<sup>6</sup> The municipality currently has limited options to generate additional revenue. Provincial infrastructure funding is based on the resident population and municipal taxes cannot account for the visitor population.<sup>7</sup> Canmore is working with the Towns of Banff and Jasper to advocate for provincial recognition of tourism-based communities and the revenue-generating tools needed to maintain and develop high quality infrastructure expected of a world-class destination.<sup>8</sup>

## Affordable Housing

Canmore has the second lowest municipal tax rate in Alberta.<sup>9</sup> This tax rate is attractive to investors; however, second homes and recreational properties drive up property values. The average home in Canmore in 2017 was over \$730,000<sup>10</sup> and the community ranks at the top of the least affordable housing markets in Alberta, based on a price-to-income ratio.<sup>11</sup>

High real estate prices contribute to a lack of affordable housing. This is a problem because affordable housing is needed to attract and retain seasonal and long-term employees in the tourism and hospitality sector. The Canmore Community Housing Corporation has created around 200 affordable housing units, but this is well under the estimated 1,000 units needed to meet needs.<sup>12</sup> Programs such as Perpetually Affordable Housing are a part of the solution, and the Town continues to seek options to increase the housing stock. Business owners also play an important role in alleviating the problem through the provision of employee housing.

## Urban Development

The Town of Canmore is projected to cap growth at 30,000 to 35,000 residents.<sup>13</sup> Current developments within the Town limits, such as Silvertip and Three Sisters, would add a mix of residential, hotel, commercial and office/industrial. The proposed Three Sisters Smith Creek development alone is expected to add up to 4000 new residents at build out.<sup>14</sup> Developments outside the Town's jurisdiction (and tax base) will house residents and visitors who will look to Canmore for services. For example, River's Bend in the Hamlet of Deadman's Flats, which is in the M.D. of Big Horn, is marketed as "just 7 minutes to downtown Canmore".<sup>15</sup>

Development in Kananaskis Country is tightly controlled and larger scale developments that would threaten the social, economic and environmental integrity of the area are either strongly discouraged or prohibited in many locations.<sup>16</sup> In general, the main priority for this area is to maintain the environment/landscape and water quality, followed by ensuring access for recreational, research and small scale development opportunities.<sup>17</sup>

## Access (Roads and Highways)

An increase in both residents and visitors will also mean increased pressure on municipal roads and provincial highways. In Canmore and Kananaskis Country, access and egress on major routes is an issue at peak times and the railway through the Town of Canmore's core exacerbates the problem. Kananaskis is accessed by one paved provincial highway (Highway 40) and parking and visitor amenities are overextended at peak times.

## Environmental Impacts

Increased visitation leads to greater strain on the natural resources that support daily living in Canmore and Kananaskis Country. As visitors and residents consume resources through their activities, there are impacts on the environment, such as increased greenhouse gas emissions contributing to climate change, a greater amount of garbage/recycling produced, and more waste water. They also put more pressure on the mountain ecosystem and the wildlife that make their homes there. Fauna such as bears, cougars and elk are forced to navigate a network of wildlife corridors and habitat patches in an increasingly crowded Bow Valley Corridor.

Stewardship of the environment is one of the guiding principles for the community and the municipal government.<sup>18</sup> There is a desire to show environmental leadership and sustainability; however, there are clearly diverse voices and visions for Canmore Kananaskis, including opposition to developments that propose growth.

## Collective Vision for the Future

In November 2018, the Town of Canmore voted to support Calgary's bid on the 2026 Olympic and Paralympic Games. This decision was based on community support and alignment with Council's strategic priorities, including legacy opportunities for affordable housing, additional flood mitigation, and improvements to barrier-free accessibility.<sup>19</sup> To support the Olympic bid, Canmore was pursuing opportunities to enhance the Nordic Centre and make improvements to the event and celebration spaces in the downtown core. While the bid did not live past the Calgary plebiscite, in which 56% of Calgary's were opposed to hosting the games, it did spark conversations in Canmore around the vision for the community and its future.

The Canmore Kananaskis area is also home to a broad spectrum of business interests, environmental groups, community organizations, dedicated citizens and regional partners that all have a stake in tourism development. Encouraging ongoing communication and collaboration between operators, Alberta Parks, TCK, Town of Canmore and other impacted groups promote alignment and allow the groups to leverage off of each others' strength. A collective vision is needed so Canmore Kananaskis can be proactive instead of reactive to shaping growth.

## Current Initiatives

The Town of Canmore has taken steps to address some of the challenges above. The following descriptions summarize these initiatives.<sup>20</sup>

### Canmore Affordable Housing Initiatives

The Canmore Community Housing Corporation (CCHC) is a non-profit corporation wholly owned by the Town of Canmore and governed as an arm's length organization. Established in 2000, CCHC supports a more sustainable community by providing a range of housing that is appropriate and affordable for the community's needs. The organization does this through research, education, advocacy and their Perpetually Affordable Housing (PAH) program.

### Palliser Trail Upgrades

Palliser Trail has been identified as an important link in Canmore's network of walking and cycling infrastructure. The area is also seeing increased development, and the Town has prioritized making improvements to the transportation infrastructure along this corridor, to connect it with the Town Centre and other community amenities.

### Integrated Parking Management Plan

The Town of Canmore commissioned a report to evaluate potential parking management strategies suitable for Canmore's Town Centre. The plan describes factors to consider when selecting and implementing strategies, including their benefits, costs, implementation requirements, obstacles, and ways to overcome those obstacles. It recommends a set of strategies to be included in an integrated parking management program.

### Integrated Transportation Plan 2018 Update

In 2018, the Town of Canmore updated their Integrated Transportation Plan. The plan guides transportation decisions and influences land use by identifying transportation infrastructure requirements and policies needed to attain the community's vision and goals for economic growth.

### Human-Wildlife Coexistence

In 2018, a report was developed by a multi-stakeholder group to provide direction on the sustainable management of human-wildlife interactions in the Bow Valley. Six key areas for improving human-wildlife coexistence were identified, including trans-boundary management, wildlife in developed areas, habitat security, food conditioning and habituation, people compliance, and wildlife management.

### Downtown Revitalization Plan

In the Fall of 2019, the Town of Canmore is planning to develop a downtown revitalization plan.

### Economic Diversification

The Town of Canmore has taken steps to promote growth within four priority sectors to help diversify the local economy. These sectors include health and wellness, food and beverage, education and creative culture multimedia. Each of these sectors have relevance to tourism development and can support the objectives of this strategy.

### Community Grants

The Town of Canmore Community Grants Program was established to provide funding to Canmore-based not-for-profit societies and community organizations for projects that benefit residents of Canmore and enhance community programming in accordance with the Town of Canmore's vision, goals, and strategic priorities. The objectives of the grants are to increase the capacity of local groups by providing occasional support for their efforts. The Town of Canmore Community Grant Program is intended to provide up to 50% of the total expenses for one-time, project-based initiatives.



# Strategic Alignment Analysis

Investment has been made by the Town of Canmore and private organizations in plans and policies that impact tourism development. The development of a Tourism Strategic Plan for Canmore Kananaskis was found to be in alignment with several existing strategies and plans in the region. Figure 1 provides a summary of key linkages related to the project.

**Figure 1. Strategic Alignment of Tourism Development in Canmore Kananaskis**

<p><b>Canmore Sustainable Economic Development and Tourism Strategy (2009)</b></p> <ul style="list-style-type: none"> <li>• Informs sustainable economic and tourism development in Canmore.</li> </ul>	<p><b>Canmore Municipal Development Plan (2016)</b></p> <ul style="list-style-type: none"> <li>• A comprehensive document covering all aspects of development, including tourism. Specifically states the goal of facilitating more opportunities for recreation and tourism.</li> </ul>
<p><b>Town of Canmore Tools for the Future (2017)</b></p> <ul style="list-style-type: none"> <li>• Identifies residents' concerns about becoming a high-traffic resort community.</li> </ul>	<p><b>Canmore Recreation Master Plan (2016)</b></p> <ul style="list-style-type: none"> <li>• Discusses strategies and planning for sport tourism which is viewed as an important aspect of tourism and the economy.</li> </ul>
<p><b>Town of Canmore Long Term Financial Strategy (2018)</b></p> <ul style="list-style-type: none"> <li>• Planning for infrastructure that will help support the Town's tourism industry.</li> </ul>	<p><b>Environmental Sustainability Action Plan (2013)</b></p> <ul style="list-style-type: none"> <li>• Guiding document for sustainable economic development and developing tourism strategy in alignment with environmental goals.</li> </ul>
<p><b>Town of Canmore Strategic Plan (2018)</b></p> <ul style="list-style-type: none"> <li>• States strategic priorities which will impact tourism development. Goals and priorities cover community, transportation, livability, sustainability, economy, and wildlife co-existence.</li> </ul>	<p><b>Integrated Parking Management Plan (2018) and Integrated Transportation Plan (2018)</b></p> <ul style="list-style-type: none"> <li>• Encourages different modes of transportation and infrastructure design to mitigate congestion from vehicles and promote visitation to downtown areas.</li> </ul>
<p><b>South Saskatchewan Regional Plan (amended 2018)</b></p> <ul style="list-style-type: none"> <li>• Sets the stage for robust growth, vibrant communities and a healthy environment within the region over the next 50 years.</li> <li>• Promotes sustainable recreation and tourism uses in provincial recreation areas and parks.</li> </ul>	<p><b>Kananaskis Country Recreation Policy (1999)</b></p> <ul style="list-style-type: none"> <li>• Lays out the approach to sustainable recreation management in Kananaskis Country.</li> <li>• Recognizes the need to preserve and maintain Kananaskis Country.</li> </ul>

**Kananaskis Country Parks Management Plans (1998-2015)**

- These plans provide a long-term vision and day-to-day guidance for stewardship of protected areas in Kananaskis Country.

**Various Area Structure and Development Plans (2000-2018)**

- Provides the framework for environmentally responsible development for eco-tourism.
- Resort centre development plans as well as affordable housing for residents who are important to the tourism economy.

**Unlocking the Potential of Canada's Visitor Economy (2018)\***

- Identifies tourism as one of Canada's largest economic drivers.
- Identifies five key challenges facing tourism in Canada, including: demand is concentrated, access is difficult, labour is in short supply, investment is lacking, and governance is not integrated.
- Demonstrates the opportunity to dramatically grow the tourism sector by generating excitement around nature-based attractions, showcasing unique cultural experiences in smaller urban centres, and elevating existing major urban centres.

\*In lieu of a provincial strategy for tourism, this national level document has been used to identify alignment.



# Tourism Supply

To support the strategic plan process, a tourism asset inventory was completed. The following discussion summarizes the key findings. The full inventory can be accessed [here](#).

## Defining a Tourism Asset

For the purposes of this study, tourism assets are goods or services that serve visitors and shape meaningful, memorable travel experiences. It is recognized that tourism assets are also used by residents. The Canmore Kananaskis' tourism asset categories are:

- Transportation (e.g. air, rail, ground transport, trails and pathways)
- Accommodation (e.g. hotels, motels and inns, lodges and cabins, campgrounds, hostels, guest ranches, bed and breakfasts)
- Entertainment and Recreation (e.g. events/festivals, outdoor activities, arts and attractions)
- Food and Beverage (e.g. restaurants, cafes, pubs, breweries, catering)
- Retail (e.g. specialty stores, gift stores)
- Travel Services (e.g. travel agencies, tour operators, wholesalers, visitor information services)
- Sharing Economy (e.g. peer-to-peer accommodation, peer-to-peer travel experiences, rideshare)

Rather than focus on services commonly found in a full-service community, the study focuses on assets that directly serve visitors and support the visitor economy. The following summarizes key findings.

## Accommodation

Canmore Kananaskis has a strong mix of accommodation providers. There are approximately 124 fixed-roof properties, including hotels (36), condo hotels/private dwellings/tourist homes (56), bed and breakfasts (31), hostels (3), and lodges/cabins (6). There is a total of 2,324 hotel rooms in Canmore and 317 in the Village of Kananaskis. The average daily room rate in peak season is \$301.56, which contributes to the attractiveness of peer-to-peer accommodation like Airbnb (average daily rate of \$181). Illegal short-term rentals are an issue, though. There are only a few areas in the community where this type of use is allowed and home and condo unit owners occasionally do not comply with restrictions.<sup>21</sup>

There are 76 campgrounds in the region with a total of 3,503 campsites. The majority of these campsites are located in Kananaskis. Sites include unserviced, serviced, walk-in and backcountry. Visitors can enjoy comfort camping at the privately-run Sundance Lodges in Kananaskis. There are also equestrian campgrounds, group camping areas, and sites open for winter camping.

Kananaskis is a leader in barrier-free facilities, making the Canadian Rockies accessible for persons with disabilities, seniors and their families. William Watson Lodge located in Peter Lougheed Provincial Park has accessible picnic sites, cabins (22), campsites (11) and a comfort camping hut (1), as well as access to more than 20 km of barrier-free trails.



## Food and Beverage

There are approximately 82 food and beverage establishments in Canmore Kananaskis, with a number of local independent options in the downtown district. Even food or coffee on the go in Canmore can be local. Visitors seeking familiar franchises will find them too. Canmore Kananaskis has a growing reputation for its dining experiences, as celebrated by the Canmore Uncorked Food and Drink Festival and Canmore Food Tours. From local ingredients to world flavours, there are plenty of options in the region.

## Experience Providers

Visitors choose Canmore Kananaskis for the mountains and the outdoor experiences. Many visitors come fully independent with all the outdoor gear and skill they need. Others look to hire experience providers to access opportunities. Experience providers in Canmore Kananaskis sell guided experiences to visitors across a range of activities, including:

- Alpine skiing
- Canoeing/kayaking
- Caving
- Dog sledding
- Fishing and fly fishing
- Heli-hiking/sightseeing
- Hiking/backpacking
- Horseback riding and pack tours
- Hunting
- Ice hockey
- Mountaineering and ski mountaineering
- Mountain biking
- Nature interpretation
- Nordic skiing
- Photography
- River floats and white-water rafting
- Rock and ice climbing
- Snowshoeing
- Stand up paddle boarding

Other experience offerings include:

- Brewery tour
- Distillery tours
- Food tours
- Destination weddings
- Golf tours
- Japanese-speaking tours
- Ice fishing
- Foraging
- Yoga

Some experience providers are owner/operators who deliver the guided experience themselves, whereas others are small businesses with staff and seasonal guides. Experience providers may sell direct to visitors or have a contractual relationship with the travel trade that packages tours for North American and overseas markets. Canmore Kananaskis has some of Alberta's best market-ready and export-ready tourism products, including products that are recognized by Destination Canada as Canadian Signature Experiences (e.g. Canadian Hockey Player Experience, Mount Charles Stewart Heli-Hike, Mushing in the Rockies, and Rat's Nest Cave Tour).<sup>22</sup>

## Sport Tourism

Canmore Kananaskis has world-class sport and recreation facilities that position it as a high-performance sport tourism destination. The Canmore Nordic Centre was built to host the cross-country ski and biathlon events for the 1988 Calgary Winter Games is located 1.5 km from downtown Canmore in the Canmore Nordic Centre Provincial Park. From 2004 to 2008, the facility was redeveloped to meet international Nordic competitive standards.<sup>23</sup> The Centre holds national training camps for Canada's biathlon and cross-country ski teams, hosts





local, provincial, national and international competitions, and its trails are used year-round by residents and visitors for Nordic skiing, hiking and biking.<sup>24</sup>

Nakiska Ski Area is 55 km southeast of Canmore and 5 km north of Kananaskis Village in Evan-Thomas Provincial Recreation Area. Nakiska is the official training centre of Alpine Canada and hosts international teams for early-season training camps. With continued enhancements to snowmaking, high-speed quads, and ski trails, Nakiska is a venue of choice for world cups and international competitions.<sup>25</sup>

Canmore Kananaskis is also home to excellent golf and curling venues that attract visitors, events and are also used by residents.

## Festival and Events

Canmore Kananaskis hosts festivals and events that draw residents and visitors. Community and tourism events share the common goal of celebrating the authentic mountain lifestyle, as seen in the mix of events like trail running, mountain biking, Nordic skiing, and alpine sports.<sup>26</sup> Canmore has worked to add a community festival atmosphere to sporting events like World Cups, and regional visitors come specifically to Canmore for cultural events like the Canmore Folk Music Festival, Canmore Highland Games, Celtic Festival and activities on Canada Day and National Indigenous Peoples Day.

## Art and Theatre

Canmore has a strong visual and performing arts scene. The community arts centre, artsPlace Canmore, offers live music and theatre performances, film screenings, art exhibits and classes. It maintains an arts directory, useful for event planners looking to book local talent for conferences, weddings and events.<sup>27</sup>

Canmore has an impressive number of art galleries (16). Galleries in the walkable downtown core showcase local, Indigenous and Canadian works in oil, acrylic, photography, glass, stone, bronze, silver and clay. The galleries are diverse. Lifeways Canmore, for example, is a social enterprise shop and gallery space showcasing the works of local First Nations artists, while All in the Wild features wildlife photography by Jason Leo Bantle (his other galleries are in Toronto, Niagara-on-the-Lake, Banff and Saskatoon). Many of the galleries have artists demos and events open to residents and visitors. Visitors can also shop for art in the Village of Kananaskis. The Berg Gallery features artwork from 15-noted Canadian artists.

## Shopping

The Town of Canmore has all the amenities of a community with a growing, urban population. Visitors can purchase food, fuel and supplies at familiar retail chains, grocery stores and gas stations. They can find their favorites brands and gear in a number of outdoor shops (20), and there are various stores that offer mountain and Canadian-inspired home decor, gifts and souvenirs (22). Visitors to Kananaskis will find basic amenities to luxury goods at the Village of Kananaskis. There are additional service stations in Kananaskis (Fortress Junction Service Station) and Stoney Nakoda First Nation (Esso beside the Stoney Nakoda Resort and Casino). The campground stores also have convenience and outdoor items.

## Visitor Services

Canmore Kananaskis has three visitor information centres. The Travel Alberta Visitor Information Centre is conveniently accessed just off Highway 1 in Canmore. Staff provide trip counselling services and referrals. They primarily help visitors book experiences (35%), attractions (25%), followed by restaurants (16%), campgrounds (16%) and accommodations (8%).<sup>28</sup> These bookings likely reflected the popular destinations for visitors, including Banff, Lake Louise, Jasper, as well as attractions in Canmore Kananaskis. The Barrier Lake Visitor Information Centre and the Peter Lougheed Discovery Centre are located in Kananaskis Country. Staff provide visitors with information and recommendations on campgrounds, hiking trails, experiences and area attractions. Visitors can also get visitor information, recommendations and booking support from hotel concierges.

## Meeting, Wedding and Convention Facilities

Canmore Kananaskis properties are well equipped for the small to medium sized Meetings, Incentives, Conventions and Exhibitions (MICE) market. Properties can host conferences, business meetings and weddings of various budgets and sizes. Canmore-based businesses that support the MICE market include wedding and event planning (23), photography (73), catering (12), and travel/tour services (85). Located a one-hour drive from Calgary, properties in Canmore Kananaskis offer all the mountain views without the additional national park fees. At present time, Canmore is lacking a large conference facility that can host larger conferences and drive visitation in the shoulder seasons.

## Community Engagement Results

As an input into the process, Canmore Kananaskis residents and stakeholders were engaged through a variety of consultation activities, including an online survey, one-on-one interviews and facilitated workshops. The findings from these engagement activities are described in this section (see Appendix A for more information). It should be noted that the results of the online survey are not statistically significant, but the input provides important context to the report.

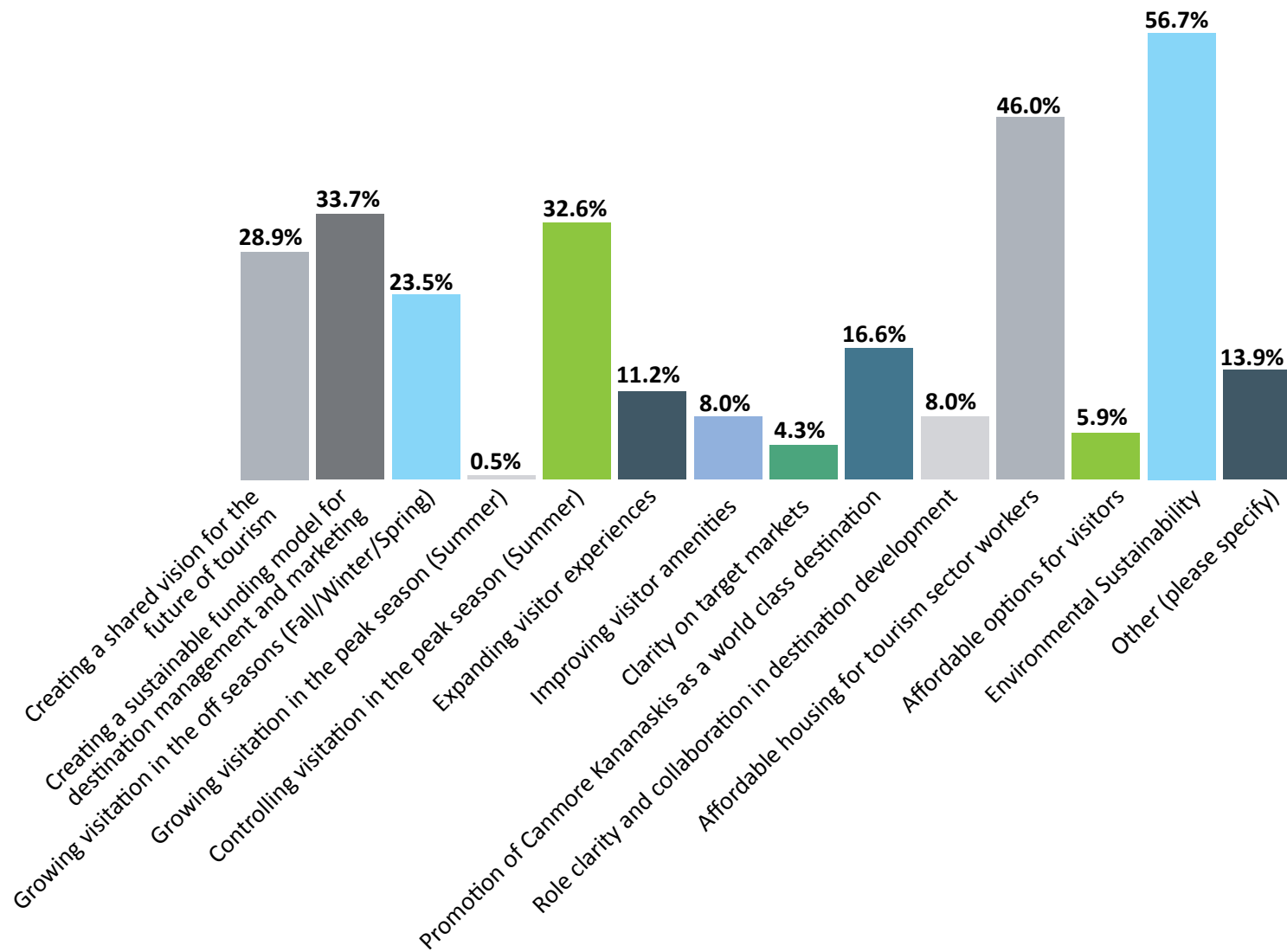
### Summary of the Online Survey (N = 187)

Residents and stakeholders were surveyed to collect input that will support the Community Tourism Strategic Plan. Respondents were asked to fill out an online survey, which ran from November 1 – 22, 2018. A link to the survey was posted on local websites and promotion occurred through TCK's social media channels, as well as a direct email invitation to TCK's database. In total, 187 responses were collected. The majority of respondents were residents (69%), followed by businesses (24%), government (2%), and NGO (2%). A summary of the main findings from the survey are provided next. For an expanded description of the results see Appendix A.



Respondents were asked to identify the most important issues they believed the strategy should focus on. The top three issues that were identified included Environmental Sustainability (56.7%), Affordable Housing (46.0%) and Creating a Sustainable Funding Model for Destination Management and Marketing (33.7%). The least important issues to respondents were Growing Visitation During the Peak Season (0.5%), Clarity on Target Markets (4.3%) and Affordable Options for Visitors (5.9%).

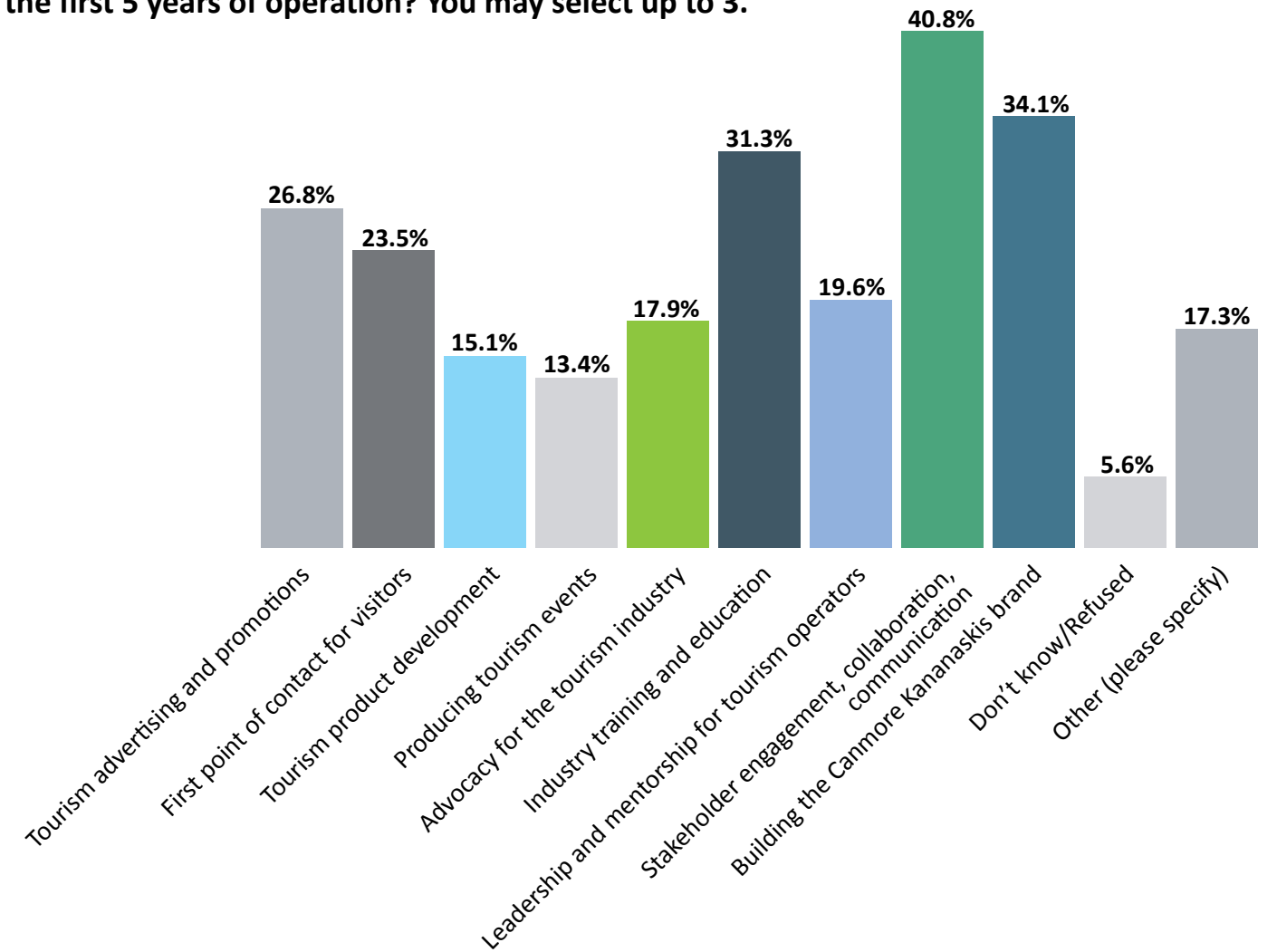
**Question: As we begin developing the tourism strategy for Canmore Kananaskis, what do you think are the top 3 issues we should focus on? You may select up to 3 options.**



Respondents were also asked to summarize their vision for tourism in five words or less. The first theme that emerged was the importance of providing an authentic experience (i.e. the soul of Canmore with its natural beauty and simplicity). There were also two important conflicting themes – that of expanding tourism, especially internationally, and also of ceasing the expansion of tourism altogether. There is some clear frustration with tourism in Canmore Kananaskis that has driven some residents to demand less tourism. The issues seem to stem from overcrowding, commercialization, and affordable housing. There are also many on the other side of the spectrum who wish to expand tourism and make Canmore Kananaskis a world-class destination.

Respondents were asked to comment on the areas TCK should focus on in the first five years. The most commonly chosen focus areas were stakeholder engagement, collaboration, and communication (40.8%), building the Canmore Kananaskis brand (34.1%), and industry training and education (31.3%). The least chosen services included producing tourism events (13.4%), tourism product development (15.1%) and advocacy for the tourism industry (17.9%).

**Question: In your view, what are the primary services this organization should focus on in the first 5 years of operation? You may select up to 3.**



To conclude the survey, respondents were asked an open-ended question about the one thing they would do to improve tourism in Canmore Kananaskis. The answers had several themes. One of the most common was sustainability of both the economy and environment. Residents and business owners want to see a sustainable plan that will not negatively impact the environment and nature. They recognize the importance of the natural beauty of the area, but this is also why a lot of them live there. They want to see it remain unadulterated as this is what they see as the soul of Canmore Kananaskis. They also want a sustainable economy. There are known issues of affordability for residents and they fear it will get worse with further development. Another key theme was collaboration. They want to see the businesses and TCK collaborate on a coherent tourism strategy in order to build the brand and market Canmore Kananaskis as a world-class destination. The third most popular theme was taking care of the little things. Residents feel that a lot of little things are slipping through the cracks, such as washroom facilities, parking, traffic flow, and generally improving the events that are hosted in Canmore Kananaskis.





## Key Themes from In-Person Community Engagement

14 key themes were identified through input gathered from the public sessions, one-on-one interviews with identified stakeholders and consultation with the project Committee.

### Key Themes

1. Tourism is the primary driver of economic activity in Canmore Kananaskis. Our economic and social prosperity depends on a healthy local tourism industry.
2. Growth in the Canmore Kananaskis tourism industry is a certainty. We choose to shape it rather than hide from it.
3. Tourism is of interest to the entire community; therefore, we require community-wide input into its development.
4. There is a need to move to a destination management mindset that sees tourism as a holistic, integrated system that affects every aspect of community life.
5. We need a sustainable funding model for destination management that ensures long term investment certainty.
6. All businesses, organizations and individuals who benefit from tourism should share in the costs needed to support the industry.
7. Our brand is based on respect for the environment, celebrating our authentic mountain lifestyle and sharing our history. We must protect, feed, nurture, share and celebrate the “soul” of this place.
8. Our tourism industry is only as strong as the people who contribute to it. We need to keep our region open and inclusive by ensuring attractive and affordable living options are available to residents and workers, and by ensuring individuals of all ability levels can experience our region.
9. We must work together collaboratively with a sense of cooperation versus competition. Together we can realize our shared vision for tourism.
10. We will work with our regional partners including Banff, Calgary, Stoney Nakoda, Alberta Parks, Kananaskis Improvement District and the MD of Bighorn to reach complimentary objectives.
11. Canmore and Kananaskis are stronger together and must work together to offer more choice and diversity for visitors.
12. We will identify niche markets and encourage visitation from those who value our region and its unique attributes.
13. We need to invest in infrastructure, transit and product that benefits investors, tourists and residents alike.
14. We will focus our efforts on growing visitation during the shoulder seasons and mid-week.



# Vision and Goals

# 03

## Compelling Reason for Change

Canmore Kananaskis is at a crossroads. The region is already busy during peak visitation months, yet businesses struggle during the shoulder and off seasons to generate revenue and keep qualified staff. Growth in visitation is likely inevitable, so there is a need for a cohesive plan to deal with it. In order to retain its authenticity and maintain its attractiveness to visitors and residents, Canmore Kananaskis must act now to shape the future. There needs to be a purposeful and deliberate effort on the part of the community and businesses to find common ground and work toward a shared vision for tourism. Failure to take action and work collaboratively could result in over tourism and degradation of the core value proposition of the community. The impacts of this could include decreased quality of life for residents, negative environmental impacts and reduced viability for tourism businesses. If the region chooses to act proactively, it has an immense opportunity to become an iconic, internationally known destination and a leader in sustainable tourism development.

## Vision for Tourism in Canmore Kananaskis

**5 Year Vision – Together, we will be implementing a highly successful sustainable tourism program that will have captured the imagination of visitors and stakeholders.**

*By 2024, Canmore Kananaskis will be fully committed to a triple bottom line approach to tourism development and this will be well received by visitors. A high degree of trust will have been built up between stakeholders and several high priority sustainable tourism development goals will have been achieved.*

**10 Year Vision – We will be seen as a leader in sustainable tourism development!**

*By 2029, Canmore Kananaskis will be seen as a leader in sustainable tourism development and visitors will be fully engaged in the brand. All stakeholders will be working as one cohesive unit and enjoying the rewards of a destination that has truly embraced a triple bottom line approach including high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.*



# The Path to Sustainable Tourism Development in Canmore Kananaskis

Through the community tourism strategic planning process, it became clear that various segments of the community have very different views about how to shape tourism development in the future. What also became clear is that there is widespread agreement on the need for a sustainable approach. But what does that mean? Who owns it? What are the real benefits?

Sustainability will be achieved by committing to the triple bottom line approach as a way to guide tourism development in Canmore Kananaskis over the next ten years. The triple bottom line approach considers economic, environmental and social factors to develop a more holistic accounting of sustainability. The approach is the backbone of the vision and will be the fibre that holds together a strong and unifying strategic plan.

*The Triple Bottom Line Approach is the backbone of the vision and will be the fibre that holds together a strong and unifying strategic plan.*

For a sustainable system to work, everyone needs to see themselves in it and all key players will be called upon to steer toward this common goal. Why will everyone do this? The simple answer is because all will benefit. All have a vested interest in driving towards sustainability because there is inherent economic, social and environmental benefit in it. The following describes how each segment of the community will participate and benefit from embracing this vision.



**Triple Bottom Line Approach**

## Visitors

Visitors will play a central role in realizing the potential of the vision. We know from our research that current customers of the region are a thoughtful, well-educated and affluent group that values authentic experiences. It is expected that this segment would pay a premium to visit a destination that truly embraces sustainability. There needs to be a focused effort on developing sustainable nature-based product, sustainability measures and methods to promote sustainable visitor behaviour. It is critical that the visitor feels part of the movement and actively participates in its realization.

## Businesses

Businesses could stand to benefit greatly from adopting a triple bottom line approach. If developed in the right way, sustainability initiatives can reduce operational costs and drive revenue. Embracing this philosophy can also help attract highly skilled and motivated workers that are mission-driven. A successful sustainability program can also be used as a selling tool to promote the destination year-round as a central part of the brand. Recognition gained from the program can be further leveraged to gain valuable earned media exposure.

## Residents

The community engagement process identified sustainability as a major issue. The triple bottom line approach was tested with the public and received significant support. Residents will play an active role in welcoming visitors, will champion the strategy in the community and will be important brand advocates moving forward.

## Governments

On a daily basis, governments have the difficult job of balancing economic, social and environmental interests. It is anticipated that if Canmore Kananaskis was successful in embracing a triple bottom line approach, the job of governing would be made easier. Governments are much more likely to invest in communities that cooperate vs. compete, therefore if the region brought forward a thoughtful, logical and coordinated triple bottom line approach, it is expected that governments would react favourably.

## NGO's

There are many groups operating in the region, each with a specific mandate to fulfill. It is anticipated that the vast majority of groups will embrace and actively participate in bringing this new vision to life.

## Sustainable Tourism Initiatives

Many tourism initiatives put forward in this strategic plan will contribute to all three pillars of sustainability and this is the ideal. It should be recognized, though, that some initiatives may not fully satisfy each of the three pillars. There may be trade-offs in the implementation of the strategy, however the aim is to achieve triple bottom line sustainability for the community's tourism system as a whole.



## How Can this Change Happen?

Conscious Travel describes the following steps to change:<sup>29</sup>

“It’s a demanding but beautiful journey that involves four distinct stages:

1. **Meeting up** - by forming a close community of adventurers that learn, work and grow together;
2. **Waking up** - being prepared to delve beneath the surface to root causes and look at challenges in a different way;
3. **Growing up** - by taking responsibility for the whole and committing to becoming better;
4. **Stepping up** - to implement a shared vision for tourism that works for all.”

At the present time, many individuals and organizations may be at the “Meeting Up” stage while others are further along the continuum. The change management and action plan sections of the strategy describe specific initiatives designed to move the entire destination toward the ultimate goal of “Stepping Up.”

## Goals

# 1

*Acknowledge the importance of tourism in our community and commit to becoming proactive in its development.*

At the present time, there are some in the community that do not fully realize the impact that tourism has on the destination. The tourism economic impact analysis completed by the Town clearly identifies the economic value of this industry and the social opportunities and challenges are apparent in the daily lives of residents. Community leaders should make a strong statement declaring the importance of the industry and back it up with concrete and proactive action.

*Build community-wide trust, collaboration, engagement and accountability in order to strengthen the social infrastructure supporting tourism.*

# 2

Due to a variety of historical factors, there may be a lack of trust among some organizations and individuals in the community. At the core of this may be the belief among some that corporations are in Canmore and Kananaskis to generate wealth at the expense of quality of life for residents. However, through the consultation process it became apparent that there is considerable common ground among all parties. Generally, corporations, residents and governments would like to see a sustainable framework in place that would encourage long term prosperity, high quality of life and environmental stewardship. Tourism Canmore Kananaskis and its partners will need to work hard to build trust and understanding for a new framework to succeed.

# 3

*Create a sustainable framework for tourism development that will ensure long term economic, social and environmental viability.*

As identified through the strategic planning process, there appears to be widespread agreement that sustainability is of critical importance to the success of the strategy. Community members support the triple bottom line approach that seeks common ground among its three pillars (social, environmental, economic). All solutions proposed need to consider the short, medium and long term impact on sustainability.

*Develop and promote outstanding visitor experiences that will position Canmore Kananaskis as a destination of choice for those who seek to immerse themselves in our authentic mountain lifestyle and vast wilderness.*

# 4

The tourism industry in Canmore Kananaskis operated without an established DMO from 2016 to 2018. That said, the destination has remained busy during the high summer season. Promoting the region's outstanding visitor experiences and developing new, niche products focused on the shoulder seasons will ensure Canmore Kananaskis becomes a destination of choice for travellers seeking an authentic mountain experience throughout the year.

# 5

*Improve the physical infrastructure of Canmore and Kananaskis to enhance visitor experience, prepare for growth and improve quality of life for residents.*

Input from the community engagement process indicated a high degree of concern over the effects of tourism on municipal infrastructure. Congestion and infrastructure pressure will only increase as visitation increases; therefore, it is critical that action is taken to protect and enhance Canmore and Kananaskis' infrastructure.



# External Analysis 04

## External Analysis

To discover the current best practices of destination management organizations in the tourism industry, the consultant team conducted a literature review and industry research of successful destination management organizations. The culmination of these efforts has resulted in the following conclusions.

### Best Practices in Destination Management Organizations

1. All of the DMO's we reviewed utilized some kind of membership-based model.
2. Partnerships within the private and non-governmental sectors are integral to the sustainability of DMO's.
3. All of the organizations that were reviewed engaged in cooperative marketing initiatives with their memberships. These funds were often matched by provincial-level programs, such as Travel Alberta's Cooperative Marketing Investment Program.
4. The key to sustainability for DMO's is to find the right mix of revenue streams to suit their configuration and scale.

### DMO Review

The consultant team gathered information from successful DMO's in Alberta and British Columbia, as well as regional organizations in Ontario and Australia. The research covered topics of their main service offerings, organizational structure, and revenue sources. The main findings are summarized in Figure 2 next. Key points from the DMO review include:

- Expanded service offerings allow for diversified revenue streams.
- A diverse board of directors allows for multiple industries to have input on strategic direction.
- All DMO's reviewed use a membership model and receive funding from a Destination Marketing Fund (DMF).

Figure 2. Findings from the DMO Review

Organization	Board Structure	Main Offerings	Revenue Sources
<b>Local DMO'S</b>			
Banff and Lake Louise Tourism <sup>30,31</sup>	<ul style="list-style-type: none"> <li>Lodging: 3</li> <li>Restaurants: 2</li> <li>Retail: 2</li> <li>Transportation, Attractions, Entertainment: 1</li> <li>Service: 1</li> <li>Ski areas: 1</li> <li>Lake Louise: 1</li> <li>District 9: 1</li> <li>Appointed: Mayor</li> <li>Appointed: Superintendent of Banff National Park</li> </ul>	<ul style="list-style-type: none"> <li>Consumer Marketing</li> <li>Media relations</li> <li>Business development</li> <li>Visitor services</li> <li>Financial and administrative services and support</li> </ul>	<ul style="list-style-type: none"> <li>87% Membership fees</li> <li>10% Partnerships</li> <li>3% Other</li> </ul>
Tourism Calgary <sup>32,33</sup>	<ul style="list-style-type: none"> <li>10 members consisting of prominent business leaders in the city</li> </ul>	<ul style="list-style-type: none"> <li>Regional, national, and international marketing</li> <li>Preferred listings and visibility to consumers</li> <li>Savings programs</li> <li>Marketing and promotions</li> </ul>	<ul style="list-style-type: none"> <li>50% Destination marketing fees</li> <li>28% City operating grant</li> <li>10% Travel Alberta joint program</li> <li>7% Partner buy-in</li> <li>5% Other</li> </ul>
Tourism Jasper <sup>34</sup>	<ul style="list-style-type: none"> <li>7-member elected board</li> <li>Voted weight determined by DMF contribution</li> </ul>	<ul style="list-style-type: none"> <li>Consumer marketing</li> <li>Media relations</li> <li>Marketing product development</li> </ul>	<ul style="list-style-type: none"> <li>80% Membership fees (voluntary)</li> <li>20% other</li> </ul>
Tourism Whistler <sup>35,36</sup>	<ul style="list-style-type: none"> <li>5 appointed</li> <li>7 elected from various sectors of business</li> </ul>	<ul style="list-style-type: none"> <li>Market research</li> <li>Media materials</li> <li>Trade show access</li> <li>Marketing and promotions</li> <li>MICE</li> </ul>	<ul style="list-style-type: none"> <li>46% Membership fees (mandatory)</li> <li>24% Marketing and Sales</li> <li>11% Conference Centre</li> <li>18% Golf Course</li> <li>1% Other</li> </ul>
Tourism Lethbridge <sup>37</sup>	<ul style="list-style-type: none"> <li>8 Appointed city members</li> <li>5 Appointed for targeted business skills</li> </ul>	<ul style="list-style-type: none"> <li>External marketing</li> <li>Internal marketing development for members.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;90% Municipal government grant</li> </ul>

Figure 2. Findings from the DMO Review (cont'd)

Organization	Board Structure	Main Offerings	Revenue Sources
<b>Regional DMO's</b>			
Tourism Sydney (NSW) Regional DMO <sup>38,39</sup>	<ul style="list-style-type: none"> <li>Subject to the control and direction of the Minister</li> <li>Appointed by the Minister</li> </ul>	<ul style="list-style-type: none"> <li>State level strategic tourism planning to and within NSW</li> <li>Develop tourism business ventures</li> <li>Design, construct, operate tourism facilities</li> <li>Major events</li> </ul>	<ul style="list-style-type: none"> <li>99% Grants from tax revenue</li> <li>1% Other</li> </ul>
Ontario Regional Tourism Organization (13 such RTOs exist across Ontario) <sup>40</sup>	<ul style="list-style-type: none"> <li>13 appointed members from business and local governments</li> </ul>	<ul style="list-style-type: none"> <li>Supports local municipal tourism organizations</li> <li>Marketing product development</li> <li>Workforce development</li> <li>Marketing and promotion</li> </ul>	<ul style="list-style-type: none"> <li>Provincial government grants</li> <li>Partnership programs</li> <li>DMF (voluntary)</li> <li>Breakdown varies widely across the different RTOs</li> </ul>

## Banff & Lake Louise Tourism

Banff & Lake Louise Tourism (BLLT) has the potential to be a strong ally of TCK moving forward. For this reason, we have specifically profiled this organization below and identified several action items related to opportunities for collaboration in Section 8 – Action Plan.

Banff & Lake Louise Tourism is the Destination Management Organization for Banff and Lake Louise. The organization has a mandate to grow year-round visitation in Banff and Lake Louise by working collaboratively with its members, the community, Parks Canada and partner organizations, such as Travel Alberta, Destination Canada and other like-minded organizations.

Banff and Lake Louise are within close proximity to Canmore Kananaskis and both destinations attract visitors from around the world searching for mountain experiences. This presents an opportunity for TCK and BLLT to partner with each other for the mutual benefit of both destinations. The potential benefits of partnering include:

- Knowledge and information sharing between the DMOs and their memberships.
- Pooling resources to provide greater leverage on mutually beneficial projects.
- Developing more effective plans by communicating regularly.
- Improving the sustainable development of tourism in the Bow Valley by taking a regional view.

# Visitor Analysis

The Alberta government publishes visitor statistics for the Province and its six tourism regions, including the Canadian Rockies. Due to a change in the quality of data from Statistics Canada, starting in 2015 the Alberta government provides analyses for international and domestic visitation to Alberta; and only for domestic visitation to its tourism regions. As a result, 2014 is the most recent analysis for international and domestic visitation to the Canadian Rockies tourism region. Their 2016 report is an analysis of domestic tourism only (Alberta and Other Canada). The consultant team used these reports and more recent PRIZM data to provide the following analysis of current visitation and target markets for Canmore Kananaskis.

*The Canadian Rockies - including its key tourism communities of Jasper, Banff and Canmore - collectively form Alberta's most iconic attraction, and one of Canada's most widely-recognized destinations on the international tourism stage.*

*- Banff, Jasper and Canmore Tourism Economic Impact Study (2016)*

## Canadian Rockies Tourism Region Visitor Statistics (2014)<sup>41</sup>

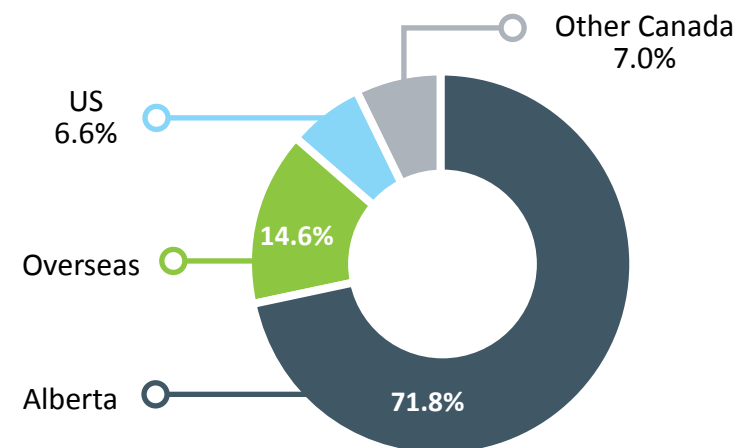
In 2014, 4.35 million total visits were made to the Canadian Rockies tourism region by residents of Alberta, other parts of Canada, the United States, and overseas. This accounted for 13% of all visits to the province. Visitors to the Canadian Rockies tourism region primarily came from Alberta (71.8%), followed by the U.S. and overseas (21.2%), and other Canadian provinces (7%). The total direct tourism expenditures for the region was an estimated \$1.7 billion, of which more than half (52.5%) is attributed to U.S. and overseas visitors. Given their smaller share of overall visitation, this indicates a high average spend by U.S. and overseas travellers. Their top spending categories were accommodation, as well as food and beverage. Compared to all other travellers, overseas visitors like to shop. In 2014, they spent nearly double what Albertans did on retail. Over half (55%) of all visits to the region involved at least one overnight stay, resulting in approximately 2.37 million overnight visits, of which 19% were from Calgary and area, 17% from Edmonton and area, 14% from Europe (primarily the United Kingdom and Germany), 12% from Asian/Oceania, 7% from central Alberta and 4% from British Columbia. The average length of stay was 3 nights with travel most popular from July to September. In terms of the main purpose of travel for overnight visitors, pleasure was most common (70.6%), followed by visiting friends and relatives (20%), other (5.2%) and business (4.2%). Important visitor information is illustrated in the charts below:

*"In 2014, the total direct tourism expenditures for the region was an estimated \$1.7 billion, of which more than half (52.5%) is attributed to U.S. and overseas visitors."*



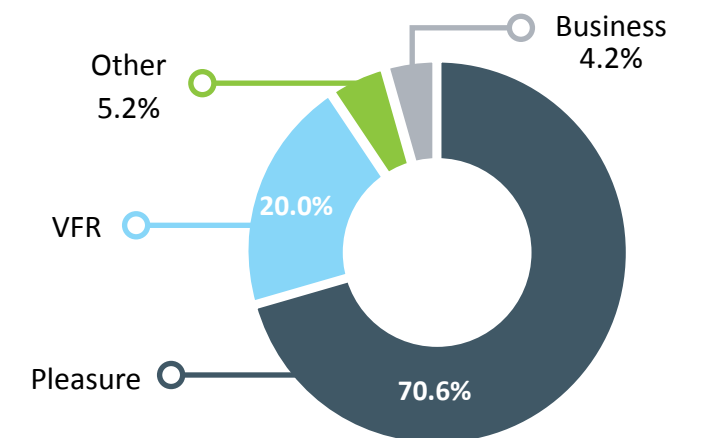
### Where do visitors come from?

Origin of Visits in Canadian Rockies - 2014  
(N=4.35 million person-visits)



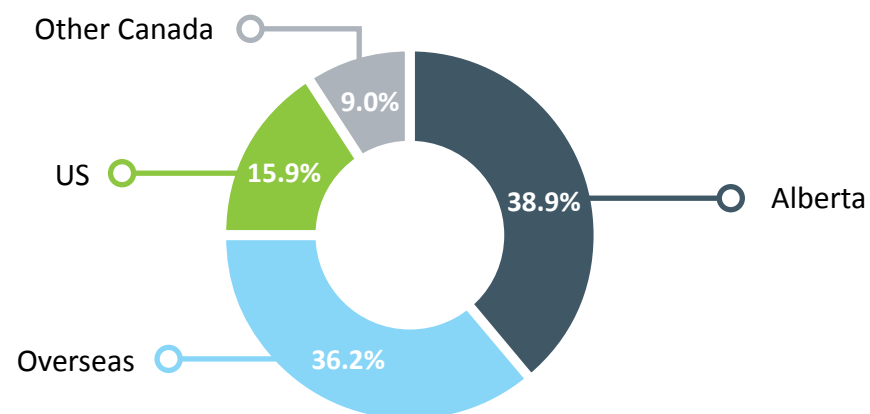
### Why do they visit?

Main Purpose of Overnight Travel to Canadian Rockies - 2014  
(N=2.37 million overnight visits)



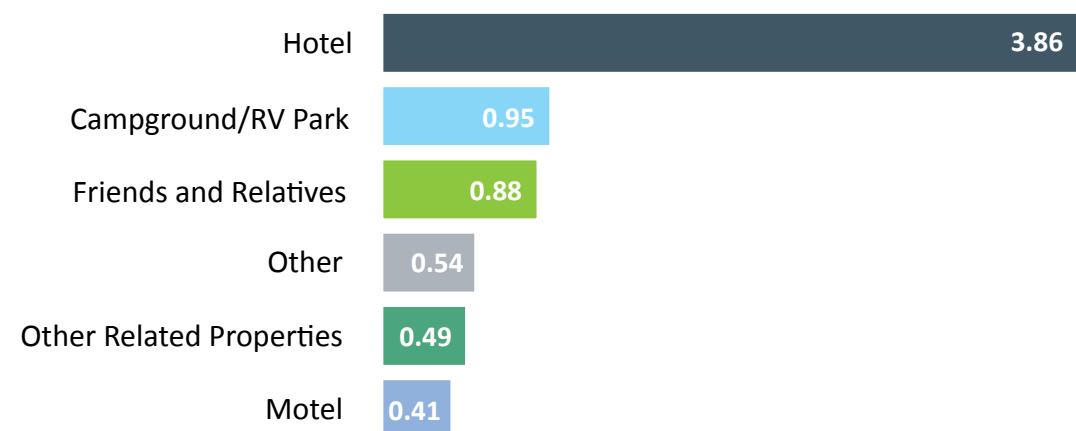
### How much do they spend?

Tourism Expenditures in Canadian Rockies by Origin - 2014



### Where do they overnight?

Accommodation Used in Canadian Rockies Tourism Region - 2014  
(N=7.13 million person-nights)



### When do they visit?

Calendar Quarter of Overnight Visits in Canadian Rockies Tourism Region - 2014

	January-March (Quarter 1)	April-June (Quarter 2)	July-September (Quarter 3)	October-December (Quarter 4)
All Overnight	17%	24%	43%	16%
By Market				
Alberta	27%	22%	26%	25%
Other Canada	18%	19%	49%	14%
United States	2%	17%	76%	6%
Overseas	6%	31%	56%	7%

### Other Characteristics of Overnight Visitors

Characteristics of Overnight Visits to Canadian Rockies - 2014

Description	Alberta	Other Canada	United States	Overseas
Average length of stay	2.2	3.1	3.4	4.3
Average spending per person per visit	\$298	\$428	\$916	\$949
Average spending per party per visit	\$502	\$712	\$1845	\$1695
Average spending per person per night	\$140	\$135	\$280	\$223
Average spending per party per night	\$236	\$225	\$564	\$399
Average party size	3.9	3.1	2.0	1.8

## Alberta

Alberta is a primary market for Canmore Kananaskis. Alberta government analysis of travel by residents of Alberta and other parts of Canada indicates that in 2016 Albertans accounted for 89.7% of the 4.27 million total person-visits by domestic travellers to the Canadian Rockies tourism region when including day trips. Of the Alberta travellers, 64% were from Calgary and area; 16% from Edmonton and area, and 5% from central Alberta.<sup>42</sup>

Economic factors like gas prices and cost of air travel continue to encourage Albertans to travel close to home. In 2016, Albertans tended to stay in the Canadian Rockies tourism region for an average of 2.6 days and traveled in parties of 4.1. They spent an average of \$294 per person per visit, totalling over \$708 million. Accommodation and food and beverage accounted for 66% of spending by residents of Alberta in the region. Travel was primarily from July to September (35%), followed by October to December (23%), January to March (23%), and April to June (19%).<sup>43</sup>

## Other Canada

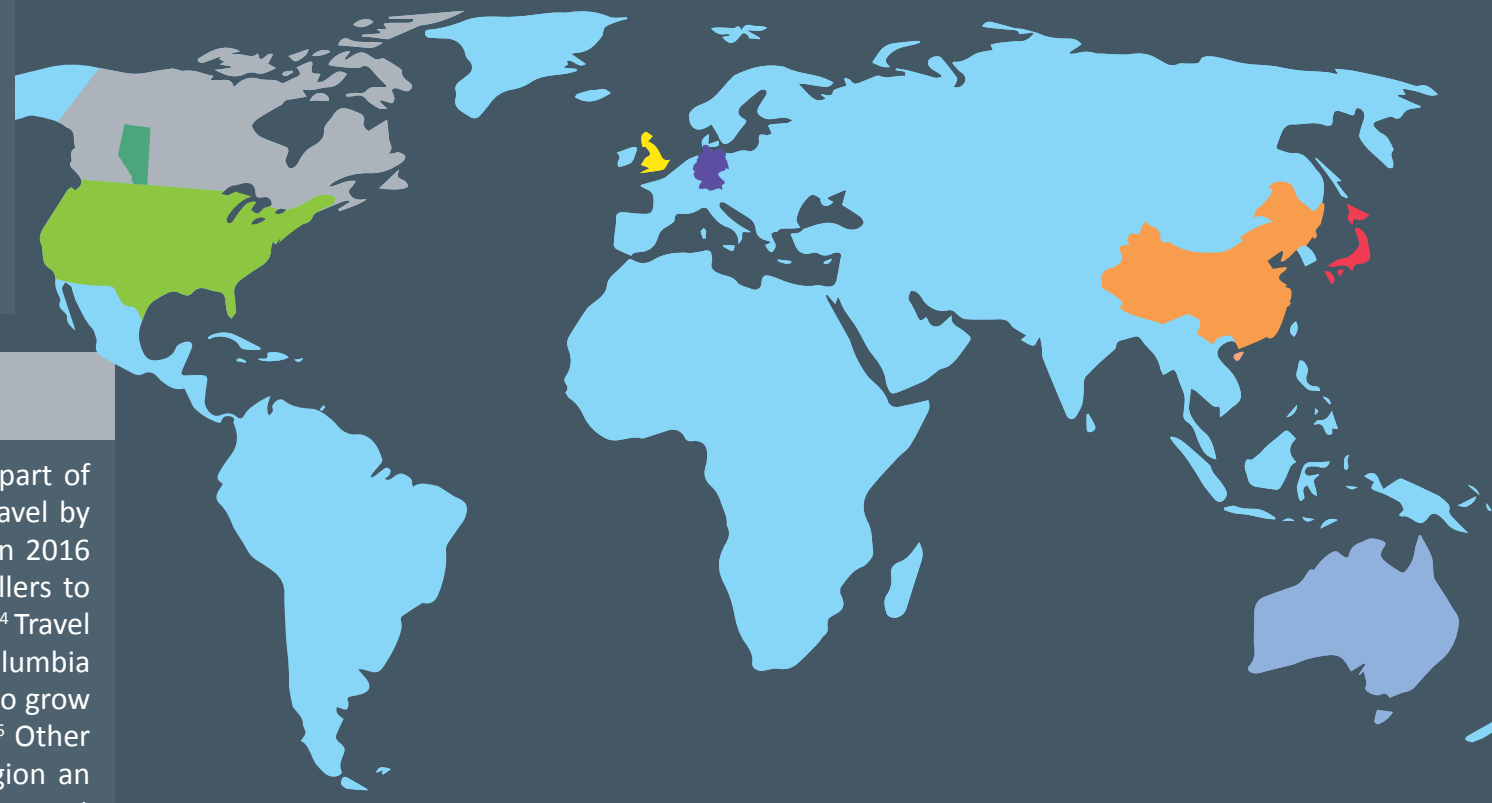
Canadians are inspired to visit the iconic Canadian Rockies as part of exploring their own country. Alberta government analysis of travel by residents of Alberta and other parts of Canada indicates that in 2016 10.3% of the 4.27 million total person-visits by domestic travellers to the Canadian Rockies tourism region were by other Canadians.<sup>44</sup> Travel Alberta identifies Ontario, Quebec, Saskatchewan and British Columbia as key Canadian markets for Alberta, including the opportunity to grow visitation from the Visiting Friends and Relatives (VFR) market.<sup>45</sup> Other Canadians tended to stay in the Canadian Rockies tourism region an average of 4.2 days and travel in an average party size of 3.3. They spent an average of \$536 per person per visit, totalling over \$270 million in 2016. Travel was primarily from July to September (41%), January to March (21%), October to December (20%), and April to June (18%).

## United States

The United States is Alberta's largest international market and Travel Alberta targets California, Texas, Washington and Montana. In 2014, U.S. visitors accounted for 6.6% (289,000) of the 4.35 million total visits made to the Canadian Rockies tourism region by residents of Alberta, other parts of Canada, the United States, and overseas. U.S. visitors accounted for 15.9% of direct tourism expenditures in the region. They spent an average of \$916 per person per visit, totalling over \$264.5 million in 2014. They stayed an average of 3.4 nights and visited primarily from July to September (76%), followed by April to June (17%), October to December (6%), and January to March (2%).<sup>46</sup> The average party size was 2, pointing to couples or pairs of friends traveling together more so than family groups. The dollar value and perceptions of Canada's safety attracts US travellers. While leisure travel remains strong, business travel has declined.

# Visitor Markets by Geography

The Canmore Kananaskis region attracts visitors from across the world. Domestic markets are the largest in terms of total numbers of visitors. Internationally, the USA, UK, Australia, Germany, China and Japan are the most engaged markets.



## United Kingdom

The United Kingdom is Alberta's largest overseas market. In 2015, there were 151,600 overnight visits by U.K. travellers to Alberta, totalling \$197.3 million in tourism expenditures.<sup>47</sup> Awareness of the Canadian Rockies is high, and Canmore Kananaskis has the experiences that resonate with this market. Residents of the U.K. are keen to travel and tend to stay longer and spend more than other markets to the Canadian Rockies.<sup>48</sup>

## Australia

Australian travel to Canada shows steady, gradual growth. In 2015, there were 92,300 overnight visits by Australians to Alberta, totalling \$133.5 million in tourism expenditures.<sup>49</sup> Canada is well perceived by Australians, and the majority of their trips to Canada are for pleasure or to visit friends and relatives (86%). Most visitors travel independently (nearly 60%), with only 18% choosing an escorted tour. Australian travellers are more likely than most to arrive during the ski season and spring months.<sup>50</sup>

## Germany

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

## Japan

Travel from Japan to Canada is slowly recovering after more than a decade of general decline (50% from 2002 to 2010). In 2015, there were 60,100 overnight visits by Japanese travellers, totalling \$67.3 million in tourism expenditures. While time and affordability are cited as barriers to a Canadian holiday, Japanese travellers feel Canada offers good value for money and is among their top five destinations to consider. Older travellers aged 55+ represent the largest segment of potential travellers from Japan, followed by travellers aged 18 to 34. The trend is toward more independent travel, but packaged tours booked through travel agents remain standard.<sup>52</sup>

## China

Visitation from China has steadily increased since Canada received Approved Destination Status in 2010. In 2015, there were 85,300 overnight visits to Alberta from Chinese travellers, totalling \$75.8 million in tourism expenditures. While the traditional escorted tour group remains popular, Chinese travellers are increasingly interested in niche experiences, including ski, winter, RV, self-drive, photography and golf.<sup>51</sup> Independent, middle-class, affluent and youthful (20 to 45 years old) are characteristics that define the fastest growing segment of Chinese traveller.



## Travel Alberta Target Market by Traveller Type

Explorer Quotient (EQ) is a market segmentation tool developed by Destination Canada to help destination marketers and managers understand the values, motivations and worldviews of different types of travellers, termed Traveller Types. Travel Alberta has used EQ to identify Free-Spirit millennials as the traveller type most likely to be inspired by Alberta’s tourism brand and to share “goosebump moments” with others.<sup>53</sup>

Free Spirits are young and young at heart. They are highly social and open minded. They have an enthusiastic look on life and travel and indulge in high-end experiences that they share freely online. They choose active holidays and seek out nature and water-activities, winter sports, festivals and events, unique food and dining and the arts.

Free-Spirit millennials are a growing subset within the Free-Spirit audience.<sup>54</sup> This is a younger demographic, commonly considered to be born between the early 1980s and early 2000s and to have grown up in an age when the internet became a way of life. Millennials are well into jobs and careers, are starting families, and prioritize spending differently than other generations (e.g. travel instead of buying a car or a home). They are also the largest traveller type in geographic markets important to Alberta, like the U.S., U.K. and China.<sup>55</sup>

*What makes Alberta different than other destinations is the unique combination of our authentic experiences, breathtaking landscapes, and of course, Albertans themselves. When all these things come together, there’s no place in the world like Alberta.*

- Alberta Tourism Brand Industry Toolkit

*Free-Spirit millennials desire the best of everything and want to be with others who feel the same way. They travel for the thrill and emotional charge of doing things and love to share and brag about their experiences.*

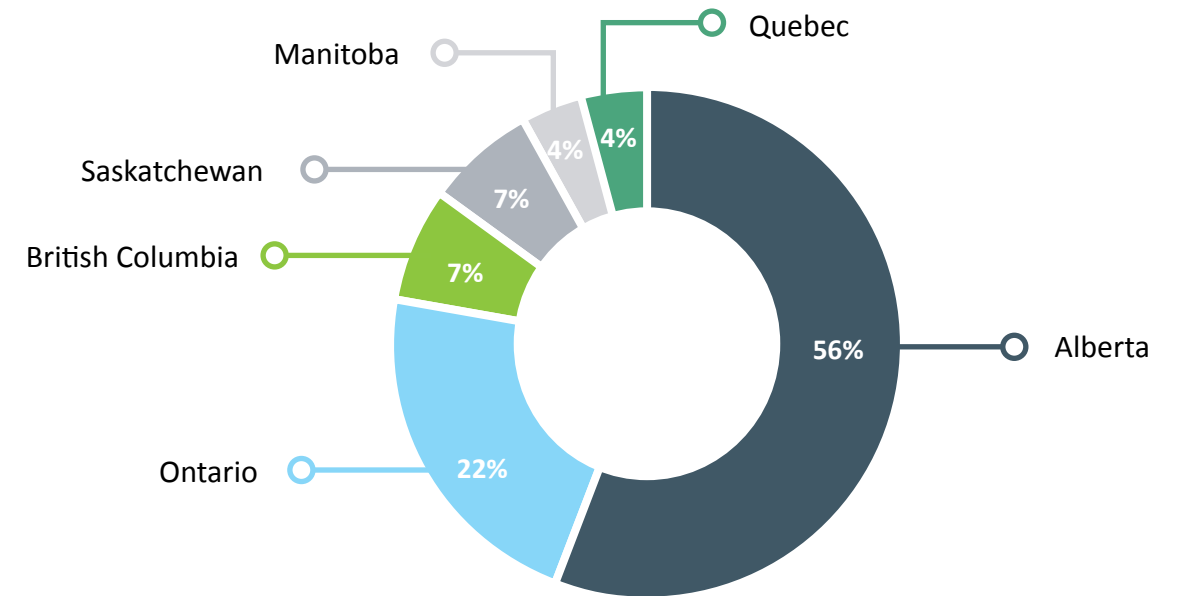
- Alberta Tourism Brand Industry Toolkit

## Data from Existing Domestic Visitors (2018)

PRIZM data was derived from analysis of 1,000 postal codes of actual customers in Canmore Kananaskis. These postal codes were collected from the customer data of hotels in Canmore. For this reason, the PRIZM data is viewed as highly reliable and, most importantly, local. It is important to note that this information is from Canadian visitors only.

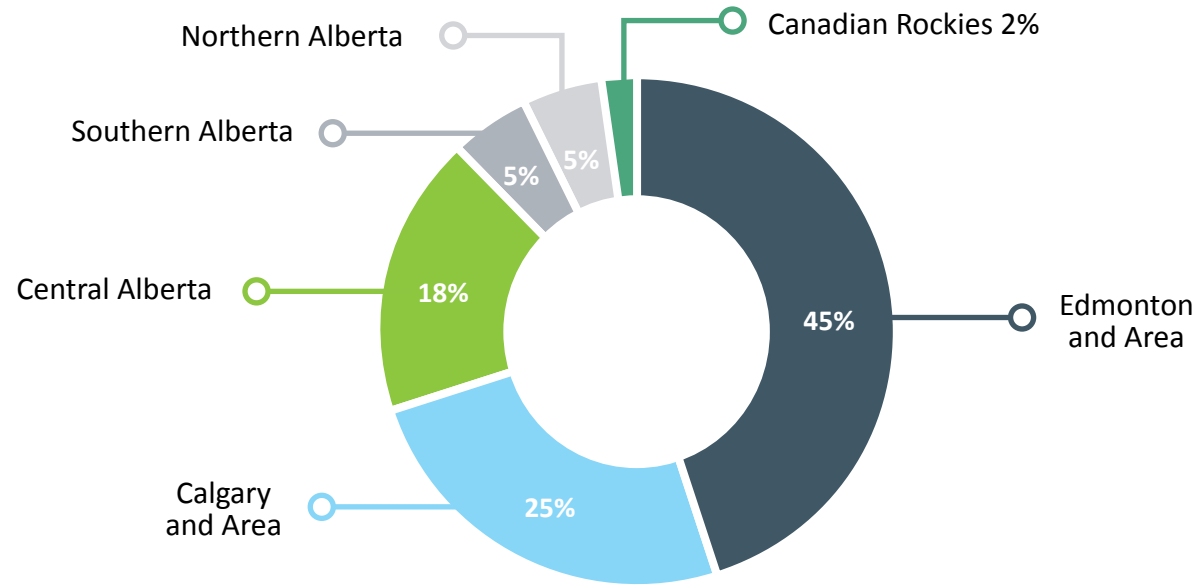
Analysis of the data revealed that the majority of domestic visitation to the region originates from Alberta (56%). This was followed by Ontario (22%), British Columbia (7%), and Saskatchewan (7%).<sup>56</sup>

Figure 3. Domestic Visitation by Province of Origin (2018)



In terms of overnight stays in Canmore from visitors originating in Alberta, the largest markets include Edmonton and area (45%), Calgary and area (25%) and Central Alberta (18%).

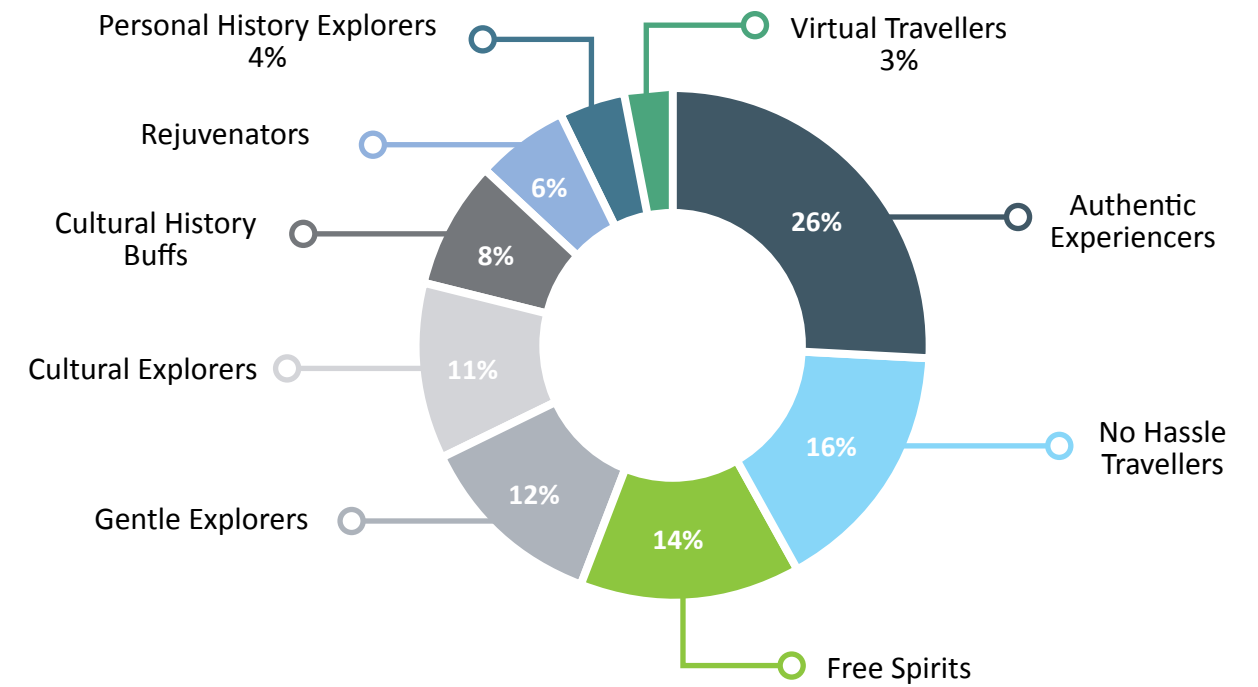
**Figure 4. Origin of Overnight Stays from Alberta Visitors (2018)\***



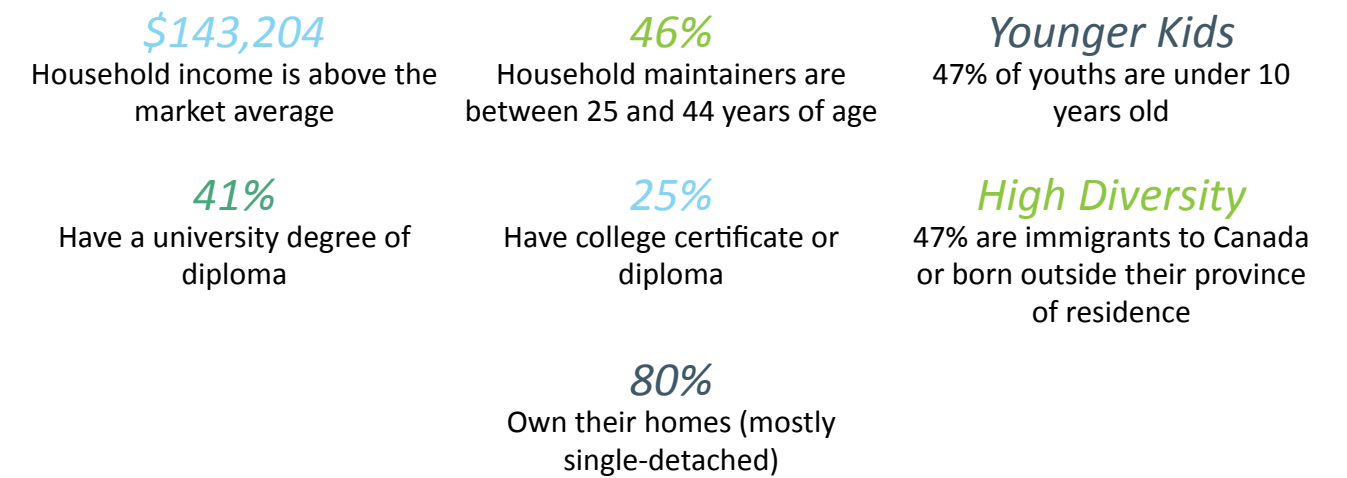
\*By destination region (established by Alberta Culture and Tourism).

Contrary to the Travel Alberta target markets, the PRIZM data indicates the majority of Canadian visitors are actually Authentic Experiencers, followed by No Hassle Travellers, Free Spirits and Gentle Explorers (see Figure 5).<sup>57</sup> This is an important finding when marketers are seeking to speak to Canadian visitors. Messages that resonate with these EQ's should be developed. For more information on EQ profiles, see Appendix B.

**Figure 5. Domestic Overnight Traveller EQs for Canmore Kananaskis**



The PRIZM tool also gathered relevant demographic information on target markets, including average household income, age groups, education, and life stage. These data points are described below.



# PESTLE Analysis

## Political

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

## Economic

The provincial economy is still recovering from the recent recession. There has been some promising economic indicators, although the economy is still weathering shocks from significant drops in oil prices. It is clear from the visitor data that regional markets are a key source for tourism in Canmore Kananaskis. The weakened provincial economy has the potential to reduce this visitation to the area. However, the relatively weak Canadian dollar encourages staycations from domestic travellers. Canada also becomes a more attractive destination for international travellers, as foreigners can stretch their money further in Canada, resulting in longer stays and more spending.

## Social

The tourism industry must consider social factors in the community, as well. For example, the influx of vacation property owners who stay in the community seasonally or periodically throughout the year is a contributing factor to the rising cost of living in Canmore Kananaskis. Canmore was recently deemed the least affordable housing market in Alberta.<sup>58</sup> The high cost of living can lead to labour shortages for tourism sector businesses and make it more difficult to retain workers. Additionally, the social impacts of tourism, such as vehicle congestion, crowding or loss of authenticity, can lead to conflicts with residents. Conversely, tourism development can add significant social value to the community through enhanced services and infrastructure.

## Technological

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



## Legal

The Bow Valley region has important land use regulations impacting tourism in the region (especially on Provincial lands). All tourism development must consider the legal framework for land use and comply with all regulations. Conversely, Canmore is located outside of the National Park and as such has more flexibility in land development. In addition to land use, the legal framework for emerging issues such as cannabis use, accommodation sharing platforms and others must be closely monitored during the implementation of the plan. The circumstances around these issues are quickly changing and it is essential that they are considered during each evaluation period of the plan.

## Environmental

The climate is changing, and impacts are being felt by Canmore Kananaskis and its tourism sector. Larger and more frequent wildfires can increase the risk of property damage. They also lead to more smoke, which increases the risk of respiratory problems and detracts from the visitor experience during the summer months. Changes in precipitation can have impacts, as well (e.g. lack of snow in the winter, increased risk of flooding in the spring etc.). Additionally, as more visitors come to Canmore Kananaskis there is a chance of increased incidences of human-wildlife interactions.



## Competitive Analysis

### Banff

The Town of Banff is located 25 km west of Canmore in Banff National Park. It is one of Canada's most recognized destinations and is part of a UNESCO World Heritage Site. Banff National Park attracts over 4 million visitors annually and the townsite boasts impressive mountain views, shopping, restaurants, attractions, hotels and services. Tourism and hospitality drive the local economy and support many of the town's 8,856 residents. The number of visitors in Banff far exceeds residents on a daily basis and Banff is distinctly a tourist town. The appeal of Banff is its convenient proximity to high-profile attractions; however, with that comes crowds and cost. Canmore Kananaskis is well positioned for visitors looking for a more local experience in Canmore or who would prefer the vast open spaces of Kananaskis.

### Jasper

The Town of Jasper is located in Jasper National Park and is part of a UNESCO World Heritage Site. From its origins as a railroad division point, today it draws nearly 2.5 million visitors annually and tourism is its primary industry. Jasper has a population of just over 4,500 permanent residents and serves as a destination and main service centre for the national park. Jasper's daily number of visitors far exceeds the local population.<sup>59</sup> Jasper is not faced with the same scale of second-home ownership, but it does share the challenges of affordable housing and limited municipal revenue sources to meet infrastructure expectations of a world-class destination. It also shares the exceptional natural beauty and outdoor experiences offered in the Canadian Rockies. Jasper is more remote than Canmore Kananaskis, as it is located 365 km west of Edmonton and 414 km northwest of Calgary. Edmonton and area (and northern Alberta) is a key regional market for Jasper. The driving distance from Edmonton to Jasper or Canmore Kananaskis is comparable, so the Edmonton area has growth potential for Canmore Kananaskis.

### Fernie

The City of Fernie is a mountain community of approximately 5,250 residents located in southeast British Columbia. Originally a coal mining town, tourism is now a primary industry and the second homeowner market is recognized as a significant contributor to the visitor economy. Positioned as "a community first, destination second," Fernie has earned its reputation as a welcoming, down-to-earth place for outdoor enthusiasts.<sup>60</sup> Investment in historic buildings and beautification has resulted in an attractive and vibrant downtown with unique shops, restaurants, galleries and cultural attractions. Alberta is a key market accounting for nearly 50% of leisure travel to Fernie. It is 300 km west of Calgary and attracts skiers, mountain bikers, campers and paddlers looking for an alternative to the increasingly busy Bow Valley corridor. Hotel prices are also attractive with the average daily rate at approximately \$200.<sup>61</sup>

## Golden

The Town of Golden in southeast British Columbia lies between two mountain ranges, the Columbia Mountains and the Rocky Mountains. The community of approximately 4,000 residents boasts enviable outdoor opportunities and proximity to national parks, provincial parks and public land. Tourism, forestry, mining and transportation are key industries, giving the Town an industrial feel. Golden enjoys the “Alberta influence,” which has insulated it somewhat from steep declines other resort municipalities in British Columbia have experienced during economic downturns.<sup>62</sup> Alberta remains a strong seasonal market, in particular Calgary which is only 260 km to the east. While visitors do choose Golden as a base to explore Banff and Lake Louise, Canmore Kananaskis is better positioned in terms of driving time and road conditions. However, Golden is attractive for its more affordable accommodation.

## Competitive Advantage

What makes Canmore Kananaskis unique is that it offers an authentic mountain town experience and vast wilderness that is in close proximity to internationally known attractions, an international airport and a large regional market. No other Alberta destination has this unique combination.

*What makes Canmore Kananaskis unique is that it offers an authentic mountain town experience and vast wilderness that is in close proximity to internationally known attractions, an international airport and a large regional market. No other Alberta destination has this unique combination.*



# Canmore Kananaskis Target Markets and Marketing Strategy 05

# Recommended Target Markets for Canmore Kananaskis

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

## Domestic Target Market

*Authentic Experiencers from Alberta and other parts of Canada who embrace the authentic mountain town experience and vast wilderness that Canmore Kananaskis has to offer.*

Increasing visitation in the shoulder and off-seasons is an important goal for the tourism sector in Canmore Kananaskis. Targeting visitors from Alberta and other parts of Canada is the most likely way to achieve this goal, since these visitors are already travelling to the Canadian Rockies throughout the year. Authentic Experiencers should be targeted first, as this EQ type was found to be the most highly engaged market based on a PRIZM analysis of 1,000 postal codes from overnight visitors.

Canada's Authentic Experiencers are looking for authentic, tangible engagement with the destinations they visit. They value spontaneity, personal control and have a concern for the environment. They are highly educated, financially secure and have reached a more mature life stage than most other EQ segments. They choose destinations that connect them to nature and actively seek out opportunities to view wildlife and natural wonders.<sup>63</sup> For more information on Authentic Experiencers, see Appendix B.

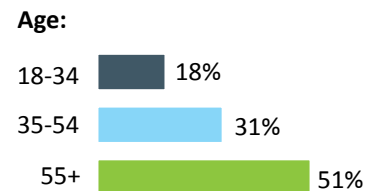
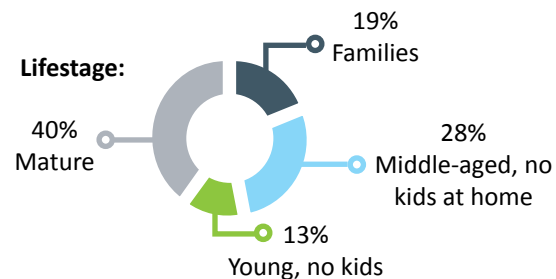
### Authentic Experiencers

Authentic Experiencers are looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.



### Demographics

**Gender:** 51% male, 49% female  
**Education:** Higher than average  
**Employment:** Full time  
**Household Income:** Higher than average\*



\*The EQ tool states household income for Authentic Experiencers is average. However, localized PRIZM data for Canmore Kananaskis indicates household income for this EQ segment is higher than average.

## International Target Market

*Authentic Experiencers and Free Spirits from the United States and overseas who embrace the authentic mountain town experience and vast wilderness that Canmore Kananaskis has to offer.*

Visitors from the U.S. and overseas countries tend to stay longer and spend significantly more than domestic visitors during their trips to the Canadian Rockies. According to Travel Alberta, Free Spirits are the largest traveller type in international geographic markets important to Alberta, like the U.S., U.K. and China. Attracting more of these visitors, particularly in the shoulder and off-seasons, will diversify Canmore Kananaskis' markets and reduce the negative impacts of seasonality throughout the year.

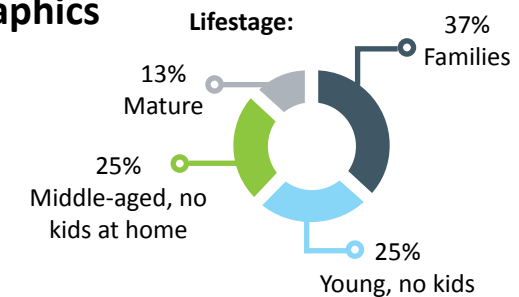
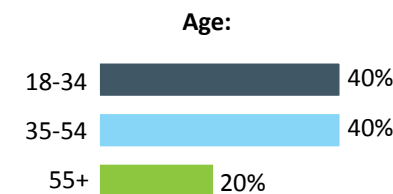
Free Spirits are highly social and open minded travellers.<sup>64</sup> Experimental and adventurous, they indulge in high-end experiences that are shared with others. When travelling, Free Spirits like to indulge themselves and will actively look for luxury and high-end experiences. Some of the activities that most appeal to them include dining at restaurants offering local ingredients, viewing wildlife and touring a destination's main attractions. Their top defining social values include gratification from shopping, risk-taking, vitality for life, and a need for status recognition. For more information on Free Spirits, see Appendix B.



### Free Spirits

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

### Demographics



**Gender:** 46% male, 54% female  
**Education:** Average  
**Employment:** FT; above avg. % are students  
**Household Income:** Higher than average

Within the domestic and international target markets, a balance between attracting Fully Independent Travellers (FIT) and group tour business should be sought. FIT's value flexibility during their trips and often travel through the use of a personal vehicle, which can lead to vehicle congestion issues. Group tours can reduce vehicle congestion; however, this form of travel can lead to other negative impacts such as overcrowding. Focusing on smaller group tours and offering shuttle bus options may be a way to minimize the impacts FIT and group tours can have on infrastructure and the visitor experience.

It should be noted that the above target markets do not rule out marketing Canmore Kananaskis to other traveller types or other forms of tourism. However, the identified target markets should be the primary focus, because they fit best with the brand and product offering in Canmore Kananaskis.

# Experience Development Focus Moving Forward

It is very clear from the market data and asset inventory analysis that there is a strong product/market match with several core niche products. Topping the list is nature-based activities. As outlined in the strategy section, visitors have a critical role to play in participating in activities that support a sustainable approach. Canmore Kananaskis should actively pursue the development of unique visitor experiences that will facilitate a powerful connection between the visitor and nature. These experiences need to further connect the visitor to the sustainability efforts of the destination. The offering should include a mix of experiences that appeal to a wide range of ability levels. Visitors should feel equally involved whether they are comfortable scaling a mountain to learn about the flora and fauna of the region or if they choose in-resort experiential activities to connect with nature.

*Canmore Kananaskis should actively pursue the development of unique visitor experiences that will facilitate a powerful connection between the visitor and nature. These experiences need to further connect the visitor to the sustainability efforts of the destination.*

Other product lines important to target markets and that align well with Canmore Kananaskis include the MICE sector (meetings, incentives, conferences and exhibitions), culture/history, culinary/shopping, sport, and health/wellness. It should be noted that for Authentic Experiencers, travel is not necessarily about escape but instead about personal development and learning. For this reason, all product lines should include experiential/learning components.

## Top Experiences for Development

- 1. Nature and sustainability
  - 2. MICE
  - 3. Culture/history
  - 4. Culinary/shopping
  - 5. Sport
  - 6. Health/wellness
- } Experiential/Learning Focus

## 1. Nature and Sustainability

Canmore Kananaskis has a wealth of natural attractions and wilderness assets that motivate travellers to visit the region. These assets can support a range of guided and unguided tourism activities, including adventure-based activities, ecotourism, hiking, cross-country skiing, camping, wildlife viewing and much more. Comparable destinations have embraced their natural assets by developing and promoting them in categories, by season and with supporting infrastructure.<sup>65</sup> Canmore Kananaskis should actively pursue the development of nature and sustainability-related experiences so that all visitors can enjoy the area's stunning outdoor environments. As mentioned above, experiences should facilitate a powerful connection between the visitor and nature and serve to further connect visitors to the sustainability efforts of the destination.

## 2. MICE

The MICE industry is big business in Alberta and Canmore Kananaskis is in a strong position to grow its market share of the MICE sector due to the region's strong highway connections, available stock of accommodations, and proximity to the Calgary International airport. According to Travel Alberta, meeting delegates are the highest yield traveller of all tourism channels, so attracting these types of visitors will have significant economic impacts.<sup>66</sup> In the near term, there is opportunity to develop niche-based MICE offerings for small/medium sized events, as well as destination weddings. The region is in an excellent position to cater to those groups who value a highly customized experience and the authentic mountain experience the region has to offer. In the longer term, the region may want to re-visit the feasibility of developing a larger conference centre.

## 3. Culture/History

Canmore Kananaskis is home to a rich cultural history and powerful stories that can connect visitors to the region. The history of the region, and the people who call the area home today, are the foundation of the authentic mountain experience that visitors want to immerse themselves in from around the globe. Canmore Kananaskis is also home to talented artists, experienced storytellers and amazing events. As such, there is opportunity to develop tourism products related to the region's culture and history.

## 4. Culinary/Shopping

Canmore Kananaskis' high-quality restaurants and authentic retail businesses are a core component of the region's value proposition. The destination has attractive culinary offerings as well as unique and authentic shops that visitors enjoy. There is opportunity to develop these offerings further and package them together with other experiences to make Canmore Kananaskis' product offering even more compelling. In particular, culinary tourism has been chosen as an area of focus for further development by the Government of Alberta. Culinary experiences can be developed as stand-alone offerings, or they can be used to enhance other experiences through packaging.

## 5. Sport

Canmore Kananaskis has outstanding recreation facilities and related infrastructure, and the community is known as a centre for excellence in sport. These assets position the destination well for further developing sport tourism. World-class facilities, such as the Canmore Nordic Centre and Nakiska Ski Resort, attract high profile competitions and other sporting events. Building upon this strong product offering, particularly in need periods, is an opportunity for Canmore Kananaskis to grow its tourism industry.

## 6. Health/Wellness

Health and wellness is a growing industry and wellness travellers are high-yield tourists. In 2017, international tourists spent on average \$1,528 per trip (53% more than average international tourists). In addition, domestic tourists spent \$609 per trip (178% more than average domestic tourists). The Global Wellness Institute predicts wellness tourism will grow to \$919 billion (USD) by 2022.<sup>67</sup> Health and wellness visitors are looking to enhance their physical, mental, social, emotional and spiritual wellbeing. Canmore Kananaskis is a place where these travellers can go to achieve these goals.





# Strategy for Tourism Marketing

When developing a strategy for tourism development, Ansoff’s Product/Mission Mix was utilized (see Figure 6). This model frames what direction tourism marketing should take. Ansoff’s Matrix identifies four different strategies, which can be described as follows:

**Market Penetration (existing products in existing markets)**

– Expanded provision of existing product for existing markets.

**Market Development (existing products in new markets)**

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

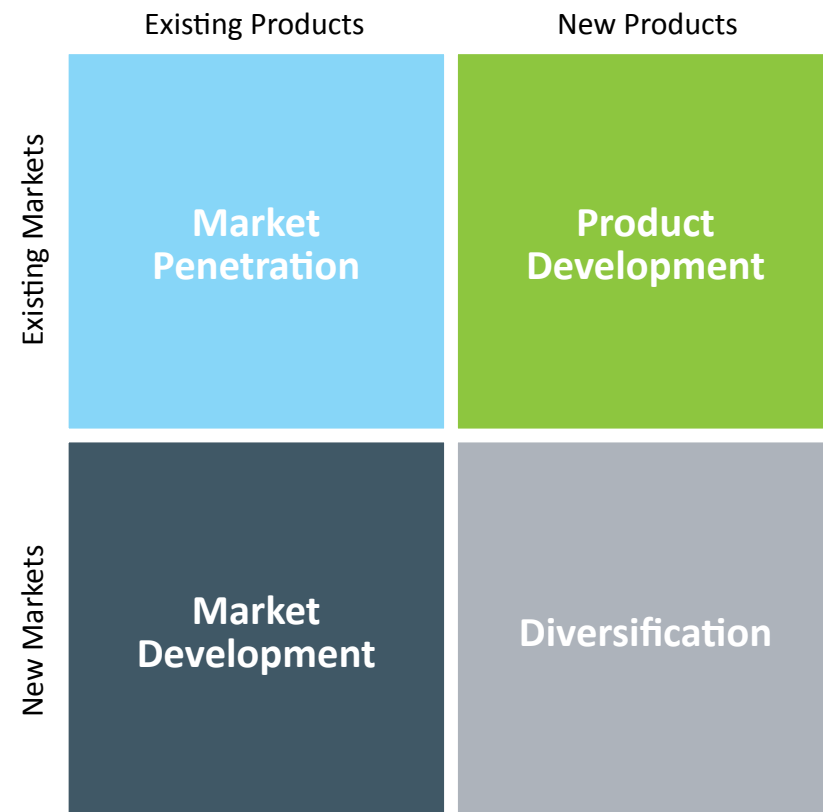
**Product Development (developing new products for existing markets)**

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

**Diversification (developing new products for new markets)**

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

Figure 6. Ansoff’s Product/Mission Mix



# Strategic Focus

Canmore Kananaskis will employ a market penetration strategy for its domestic market and a market development strategy for its international market. The following points support this.

**Market Penetration (Domestic Focus)**

- A. Strong Existing Markets** – Edmonton, Calgary, Red Deer and their surrounding areas represent over half of Alberta’s population (more than 2.5 million people), and they are already engaged by the product offering in Canmore Kananaskis (see Figure 4). Creating a deeper connection with this highly educated, affluent customer base will be important. In addition, furthering relationships with other Canadian markets will also be important.
- B. Strong Existing Products** – Canmore Kananaskis offers an outstanding tourism product that strongly resonates with Canada’s Authentic Experiencers. Communicating the story of Canmore Kananaskis and marketing the destination’s compelling tourism product to target markets is a high priority.
- C. Need for Increased Visitation in the Shoulder Seasons** – Canmore Kananaskis has expressed a need for increased visitation in the shoulder seasons. The destination’s domestic market is currently highly engaged by the available product and travels to Canmore Kananaskis regularly throughout the year. Building upon this year-round interest in the destination will be important to satisfying this need.

**Market Development (International Focus)**

- A. High Value Markets** – On average, international visitors spend twice as much as domestic visitors in the Canadian Rockies (on a per person per night basis) and account for 50% of total visitor spending. Attracting this market during the need times of shoulder and off-seasons is a focus of the strategy.

**Important Note**

Market penetration (domestic) and market development (international) are the strategic priorities and the majority of implementation activities should generally fall within these focuses. However, it is important to note that Canmore Kananaskis should not limit itself exclusively to this approach. If attractive opportunities arise that fall within the focus areas of product development or diversification, they should be considered on a case by case basis.

# Roles in Implementation 06



## Roles in Implementation

This section describes the roles each organization will play in implementing the strategy. TCK will take a leadership role in implementation and will be supported by the Town and other important stakeholders. Canmore Kananaskis currently has in place a multi-stakeholder group named the “Tourism Round Table.” This existing group will be the mechanism to ensure collaborative implementation of the strategy.

### Guiding Principle for Implementation:

*We will work together collaboratively with a sense of cooperation versus competition. We will communicate openly and honestly and be accountable to each other. Together we can realize our shared vision for tourism.*



# Role of TCK, Town of Canmore and Tourism Round Table

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

Tourism Canmore Kananaskis	
Role	<p><b>Strategy Implementation</b></p> <ul style="list-style-type: none"> <li>• Takes the lead role in ensuring the strategy is moving forward in the most effective and cohesive manner.</li> </ul> <p><b>Destination Management</b></p> <ul style="list-style-type: none"> <li>• Commits to a triple bottom line approach that seeks economic, social and environmental sustainability.</li> <li>• Contributes to modelling a destination management approach that sees tourism as a holistic, integrated system that affects every aspect of community life.</li> </ul> <p><b>Short Term Objectives of the Organization</b></p> <ul style="list-style-type: none"> <li>• Promote the destination through collaborative marketing.</li> <li>• Provide networking and collaboration opportunities for tourism stakeholders.</li> <li>• Industry training and education.</li> <li>• Collection and distribution of market analytics, trends and best practices.</li> <li>• Advocacy.</li> <li>• Operation of VIC.</li> </ul> <p><b>Leadership</b></p> <p>TCK has an opportunity to build deep multi-level relationships with individual businesses by supporting their business needs related to tourism marketing and experience development. This will further position TCK as the “go to organization” for destination management and will help the organization become indispensable.</p>
Composition	<ul style="list-style-type: none"> <li>• Town of Canmore Council, Legal and Financial sectors of the Bow Valley, Directors from the Membership including hotels, food and beverage, tour operators and retail.</li> </ul>
Main Clients	<ul style="list-style-type: none"> <li>• Those that directly benefit from cooperative marketing and experience development including (but not limited to) hotels, food and beverage, retail and tour operators.</li> <li>• All community stakeholders through a destination management approach.</li> </ul>

Tourism Canmore Kananaskis (cont’d)	
Funding	<ul style="list-style-type: none"> <li>• Voluntary membership contribution.</li> <li>• Fee for service initiatives.</li> <li>• Partnerships/in kind contributions.</li> <li>• Project based grants.</li> </ul>
Structure	<ul style="list-style-type: none"> <li>• Non-Profit Organization.</li> </ul>
Town of Canmore	
Role	<p><b>Strategy Implementation</b></p> <ul style="list-style-type: none"> <li>• A strong partner in ensuring the strategy is moving forward in the most effective and cohesive manner.</li> </ul> <p><b>Destination Management</b></p> <ul style="list-style-type: none"> <li>• Commits to a triple bottom line approach that seeks economic, social and environmental sustainability.</li> <li>• Contributes to modelling a destination management approach that sees tourism as a holistic, integrated system that affects every aspect of community life.</li> </ul> <p><b>Contributions to Implementation</b></p> <ul style="list-style-type: none"> <li>• Creates a clear regulatory framework in which the destination will operate under, including tourism related bylaw and policy creation, education and enforcement.</li> <li>• Long term planning related to tourism development, tourism infrastructure and sustainability.</li> <li>• Provides direction and mentorship to community groups that support tourism.</li> <li>• Takes the lead on inter-municipal collaboration.</li> <li>• May contribute to project-based or operational funding to support the plan.</li> </ul>
Composition	<ul style="list-style-type: none"> <li>• Town of Canmore Economic Development Department under the direction of Town Council.</li> </ul>
Main Clients	<ul style="list-style-type: none"> <li>• Serves residents, organizations and businesses.</li> </ul>
Funding	<ul style="list-style-type: none"> <li>• Tax base.</li> <li>• Project based grants.</li> </ul>
Structure	<ul style="list-style-type: none"> <li>• Municipal Government.</li> </ul>

Tourism Round Table (Existing Advisory Committee)	
Role	<ul style="list-style-type: none"> <li>A multi-stakeholder group that acts as a forum for consistent communication, collaboration and idea sharing related to the development of the strategy.</li> </ul>
Composition	<ul style="list-style-type: none"> <li>TCK, Town of Canmore, BOWDA, BIA, CHLA and Chamber. It will be important to ensure representatives from each pillar of sustainability are regularly engaged (i.e. environmental, social and economic). See Goal 1, Action Item 4.4.</li> </ul>
Meeting Frequency	<ul style="list-style-type: none"> <li>Monthly.</li> </ul>
Main Clients	<ul style="list-style-type: none"> <li>Serves residents, organizations and businesses.</li> </ul>
Funding	<ul style="list-style-type: none"> <li>Project based grants.</li> </ul>
Structure	<ul style="list-style-type: none"> <li>Advisory Committee.</li> </ul>



## Role of Other Stakeholders

Organization	Role
Chamber of Commerce, CHLA, BIA and BOWDA	<ul style="list-style-type: none"> <li>These organizations are a critical link to businesses and will play a key leadership role in implementation.</li> <li>These organizations should encourage members to participate in initiatives that align with the plan and support a triple bottom line approach.</li> </ul>
Businesses	<ul style="list-style-type: none"> <li>Businesses are the front line of the plan and should be encouraged and supported in delivering high quality, engaging sustainable tourism experiences. Businesses can also be encouraged to enhance the sustainability of their operations as it relates to a triple bottom line approach.</li> </ul>
Residents	<ul style="list-style-type: none"> <li>Residents will play a crucial role in bringing this plan to life. Passionate and dedicated champions will need to be inspired to help implement the plan and buy-in to the triple bottom line approach. Making the opportunity to participate in Task Forces and Action Item Teams available to them will be important.</li> </ul>
Alberta Culture and Tourism	<ul style="list-style-type: none"> <li>Alberta Culture and Tourism could be an important funding partner moving forward. The department also provides excellent resources, training and advice in implementation.</li> </ul>
Travel Alberta	<ul style="list-style-type: none"> <li>The organization provides excellent resources, training and advice in implementation.</li> <li>Travel Alberta provides matching funding for promotion of tourism initiatives through its cooperative marketing investment fund.</li> </ul>
Alberta Parks	<ul style="list-style-type: none"> <li>Alberta Parks manages the province's land base and natural resources through the Land-use Framework. All land-based activities are considered through this Framework, including tourism. The ministry is the development authority on all lands outside of the Town of Canmore and Municipal District of Bighorn, and also manages provincial parks and public recreation areas.</li> <li>Provision of tourism product.</li> </ul>
Kananaskis Improvement District	<ul style="list-style-type: none"> <li>KID provides local government and municipal services to residents, ratepayers and visitors of Kananaskis Country.</li> <li>There is opportunity for KID to contribute to implementing the strategy, as well as regional tourism initiatives.</li> </ul>
Neighbouring Municipalities	<ul style="list-style-type: none"> <li>There is potential to partner with neighbouring municipalities on regional tourism initiatives.</li> </ul>
Stoney Nakoda First Nations	<ul style="list-style-type: none"> <li>There is potential to partner with Stoney Nakoda on regional tourism initiatives, including the development of Indigenous tourism experiences.</li> </ul>
Other DMO's	<ul style="list-style-type: none"> <li>There are opportunities to partner with other DMO's on initiatives that support tourism development.</li> </ul>

# Funding Mechanisms 07



## Funding the Strategic Plan

This section provides an overview of potential revenue streams that are available to help implement the plan.

### Increase in Business Activity and Tax Base

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

### Membership Contributions

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

TCK is currently collecting voluntary membership contributions from participating members. This program involves participation by operators who agree to charge an extra fee on their services. This is then contributed to a fund for collective marketing and destination development purposes. In order for a membership fund to achieve a sustainable scale, it must reach a critical mass of participants (preferably from multiple segments). Membership contributions can be challenging to develop and maintain, but there are many examples of successful organizations that utilize similar programs in Alberta.

Membership contributions will provide much needed core funds that could be leveraged with contributions from granting bodies. It is recommended that tourism product development is also identified as an acceptable expenditure of funds (in addition to promotions). A voluntary membership program can help create engagement from the business community as they will have “skin in the game.” This could in turn result in increased communication and partnerships (e.g. packaging of tourism experiences).

In certain jurisdictions (e.g. Ontario), contributions to a membership fund (also known as a Destination Marketing Fund or Tourism Improvement Fund) can be made mandatory for local businesses. Given Alberta’s legal framework, it is not clear if a mandatory membership program would be permissible or able to withstand a legal challenge. Mandatory contributions also typically require a high degree of alignment within the local tourism industry and community before they can be put in place, which can make them more difficult to initially start up. Therefore, it is not recommended to pursue a mandatory membership model.

### Fee for Service

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

## Municipal Funding

In Alberta, municipalities invest in local and regional tourism organizations in a variety of ways, including core funding, contracts and special project funding. The municipality can also support the strategy through the development of infrastructure that enhances the visitor experience, in addition to dedicating staff resources towards appropriate tourism-related initiatives.

## Provincial Funding

The Government of Alberta and Travel Alberta invest funds in provincial, regional and local tourism initiatives through programs such as Travel Alberta’s Cooperative Marketing Investment Program and provincial services in product and destination development, investment, research and visitor services.

Funding support is also available from the province through other programs. For example, the Community Initiatives Program funds initiatives (up to \$75,000) that enhance and enrich communities across Alberta. This program empowers local citizens and community organizations to work together towards the betterment of their communities. A brief overview of available provincial funding programs is provided in Figure 7.

**Figure 7. Provincial Funding Programs (alphabetical order)**

Organization	Program	Available Funding
Alberta Culture and Tourism	Tourism Growth Innovation Fund	Up to \$75,000
Alberta Culture and Tourism	Major Cultural and Sport Events	\$250,000 maximum
Alberta Culture and Tourism	Visitor Friendly Alberta	Project dependent
Alberta Culture and Tourism	Community Facility Enhancement Program	\$125,000/year (small) \$1,000,000/year (large)
Alberta Culture and Tourism	Heritage Awareness Grants	\$15,000
Alberta Culture and Tourism	Historic Resource Conservation Grants	Grants range from \$5,000 - \$100,000
Alberta Culture and Tourism	Tourism Entrepreneurship Startup Seminar	Seminars are free to attend
Alberta Economic Development and Trade	Community and Regional Economic Support (CARES)	\$10,000 minimum
Alberta Labour	Summer Temporary Employment Program	\$10,000,000 annually province-wide

**Figure 7. Provincial Funding Programs (cont’d)**

Travel Alberta	Cooperative Marketing Program	Under and over \$100,000 categories
Travel Alberta	Tourism Training Programs	100% of approved training costs

Over the past number of years, the Town of Canmore and its partners have been actively lobbying the provincial government for resort municipality status and/or additional revenue tools to deal with pressure on infrastructure and services. This initiative has not yet come to fruition. See Initiative 6 under Goal 5 of the Action Plan for an action item related to this.

## Stakeholder Contributions

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

## Corporate Partnerships

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



# Action Plan 08

## Goals, Initiatives and Action Item Charts

The Action Plan is divided into goals, initiatives and action items. Initiatives have been provided that summarize the actions needed to achieve the five goals. Within each initiative, specific action items have been established that clearly describe the steps that should be taken to achieve the initiative. The action items will also assist the destination in evaluating the success of the plan moving forward. Each action item has been assigned a suggested priority rating, estimated cost, organizational lead and anticipated timeline for implementation.

### Priority Criteria

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

### Cost Criteria

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

### Organizational Lead

The action plan identifies organizations responsible for leading action items. It is expected that lead organizations will provide the resources necessary to implement their action items. Please see below for a list of these organizations.

Abbreviation	Organization
TCK	Tourism Canmore Kananaskis
TOC	Town of Canmore
TRT	Tourism Round Table
KID	Kananaskis Improvement District
MDB	Municipal District of Bighorn
ACT/TA/AP	Provincial Organizations (Alberta Culture and Tourism, Travel Alberta, Alberta Parks)

## Implementation Timeline

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

## Quick Wins



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

## Highest Priority Items



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

## Future Planning, Evaluation and Reporting

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

## Implementation Considerations

In total, the Action Plan identifies 118 action items, grouped into 45 separate initiatives. Attempting to complete all initiatives concurrently will stretch the resources and limit the focus of the organizations responsible for implementation. Therefore, it is recommended that implementation of the plan begin with the highest priority items.

## Establishment and Measurement of Sustainability Initiatives

An important early action item identified in this plan is the establishment of a sustainable tourism program. During this process, specific sustainability initiatives will be developed, and key performance indicators will be established.

## Vision for Tourism in Canmore Kananaskis

The vision for tourism in Canmore Kananaskis is restated below to help frame the direction of the Action Plan.

**5 Year Vision – Together, we will be implementing a highly successful sustainable tourism program that will have captured the imagination of visitors and stakeholders.**

*By 2024, Canmore Kananaskis will be fully committed to a triple bottom line approach to tourism development and this will be well received by visitors. A high degree of trust will have been built up between stakeholders and several high priority sustainable tourism development goals will have been achieved.*

**10 Year Vision – We will be seen as a leader in sustainable tourism development!**

*By 2029, Canmore Kananaskis will be seen as a leader in sustainable tourism development and visitors will be fully engaged in the brand. All stakeholders will be working as one cohesive unit and enjoying the rewards of a destination that has truly embraced a triple bottom line approach including high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.*



## Short Term Priority Items for Implementation

Priority Action Items (!)	Estimated Cost	KPI	Measurement Tool
1. Obtain formal motions from the TCK Board and the Town of Canmore to move forward with the Strategy as a core planning document.	Internal resources	Motions of support from TCK Board and Town of Canmore.	Meeting minutes
2. Initiate a work plan for the strategy and begin implementation.	Internal resources	Work plan completed and tasks assigned.	Work plan Annual evaluation
3. Implement the TCK Business Plan.	Internal resources	Major initiatives underway.	Annual evaluation
4. Gain support for the strategy. - Community presentations - Tradeshow display - Other communications	\$10,000 - \$20,000 depending on internal resources used.	Change management strategy and stakeholder communications plan are successfully implemented.	Change management strategy Stakeholder communications plan
5. Secure project funding to launch key initiatives.	Internal resources	Funding is secured for all key initiatives in year 1 of implementation.	Operating budgets (TCK + Town)
6. Add human resources to implement the strategy.	As per TCK and ToC operational budgets.	Positions filled.	Operational plans
7. Develop a sustainable tourism program and business case for sustainable tourism.	\$150,000 - \$175,000	Sustainable tourism program developed. At least 3 initiatives underway by end of Q2 2020. Business case completed. Stakeholders buy in to triple bottom line benefits.	Annual evaluation Budgets Annual evaluation Business and resident survey
8. Increase the knowledge and capacity of tourism stakeholders in regards to sustainability. - Sustainability training - Conference attendance	\$5,000 - \$10,000	Key learning objectives achieved. Introduction of at least 3 business-led initiatives. Attendance at 2020 IMPACT Sustainability Travel & Tourism Conference.	Annual evaluation
9. Implement a sustainable funding model for TCK.	N/A	TCK collects predictable revenues to sustain its operation. TCK projects consistent annual revenue growth in year 2 onward.	TCK operating budget
10. Communicate the value proposition of the destination and of TCK to visitors and potential members. - Rebrand	\$20,000 - \$40,000	Increased visitor awareness. Increased visitor spending. Increased community awareness. Increased member awareness. Increased membership for TCK. Increased revenue to TCK	Visitor survey (Net Promoter Score) Annual revenue projections, economic impact study (medium term) Business survey Public survey Membership data TCK budget

## Gain Support

**GOAL #1: Acknowledge the importance of tourism in our community and commit to becoming proactive in its development.**

**Opportunity Overview:** At the present time, there are some in the community that do not fully realize the impact that tourism has on the destination. The tourism economic impact analysis completed by the Town clearly identifies the economic value of this industry and the social impacts are apparent in the daily lives of residents. Community leaders should make a strong statement declaring the importance of the industry and back it up with concrete and proactive action.

Initiatives	Action Items	Priority/Cost	Lead/Timeline
1. Obtain commitment from core partners to support the implementation of the strategy. !★	1.1 Obtain formal motions from the TCK Board and the Town of Canmore to move forward with the Strategy as a core planning document.	H/L	TCK/S
2. Develop an implementation work plan. !★	2.1 TCK will initiate a work plan for the strategy with support from the Town of Canmore and the Tourism Round Table. 2.2 Partners are to begin implementation of their assigned action items.	H/L	TCK/S
3. Implement the Business Plan for TCK. !	3.1 Approve the TCK Business Plan and begin implementation.	H/L	TCK/S
4. Gain support for the Community Tourism Strategic Plan. !	4.1 Implement the attached change management and stakeholder communication plans for the strategy that will assist in communicating the vision to stakeholders. 4.2 Recruit community members to participate in the implementation of the strategy. 4.3 Develop a sub-committee that would meet periodically to ensure the plan is coordinated with government initiatives. The sub-committee should include representation from AP, TA, ACT, KID, MDB and ToC. 4.4 Ensure the Tourism Round Table regularly engages with representatives from each pillar of sustainability (environmental, social and economic).	H/M	TCK + TRT/S

Initiatives	Action Items	Priority/Cost	Lead/Timeline
5. Secure project funding in the short term to launch key initiatives. !	5.1 Seek provincial and municipal grant funding for top priority initiatives in the action plan. 5.2 Develop a package of action items that can be presented to grant funders as a project. 5.3 Attempt to secure matching funding from multiple organizations wherever possible.	H/H	TCK/S
6. Add human resources as required to implement the strategy. !	6.1 Fill critical positions at TCK to ensure a high-functioning DMO (see TCK Business Plan). 6.2 Ensure the Town of Canmore is adequately resourced to implement its action items in the strategy. This can be done by allocating existing resources or hiring new resources. 6.3 Seek commitment from other key stakeholders as required to resource the strategic plan.	H/H	TCK + ToC/S
7. Evaluate action plan initiatives regularly and re-align priorities.	7.1 Evaluate progress on action plan initiatives quarterly in the first two years, and bi-annually after that. 7.2 Complete an annual review of the action plan that evaluates past performance, identifies key priorities, assigns responsibilities and sets targets. 7.3 Complete an annual review of the TCK business plan that evaluates past performance, identifies key priorities, assigns responsibilities and sets targets. 7.4 Deliver an annual presentation to Town Council and other partners describing the progress on the strategy. 7.5 In year 5 (2023), update the Community Tourism Strategic Plan. The update should include a comprehensive, formal review of the existing strategy to determine what is working and not working. Make adjustments as required and chart a course for the next five years.	H/L	TCK + TRT + ToC/ongoing

## Build Momentum

*GOAL #2: Build community-wide trust, collaboration, engagement and accountability in order to strengthen the social infrastructure supporting tourism.*

**Opportunity Overview:** Due to a variety of historical factors, there may be a lack of trust among some organizations and individuals in the community. At the core of this may be the belief among some that corporations are in Canmore and Kananaskis to generate wealth at the expense of quality of life for residents. However, through the consultation process it became apparent that there is considerable common ground among all parties. Generally, corporations, residents and governments would like to see a sustainable framework in place that would encourage long term prosperity, high quality of life and environmental stewardship. Tourism Canmore Kananaskis and its partners will need to work hard to build trust and understanding for a new framework to succeed.

Initiatives	Action Items	Priority/Cost	Lead/Timeline
1. Ensure organizational transparency between groups involved in implementing the strategy. ★	1.1 Organizations involved in the implementation of the strategy should commit to the highest practices of transparency to foster open, trusting relationships.	H/L	TCK + TRT + ToC/S
2. Enhance communication and increase collaboration between all groups that have a stake in tourism development. ★	2.1 The Tourism Round Table should continue to meet on a monthly basis to share plans, information, opportunities, challenges and successes. 2.2 Develop an “industry” portal on the TCK website where member businesses can learn about one another, engage with each other and share information/resources/ideas.	H/L	TCK + TRT/ongoing
3. Ensure efficient delivery of tourism services. ★	3.1 Evaluate the roles and responsibilities of organizations that have an impact on the tourism industry in Canmore Kananaskis and identify opportunities to increase efficiency, fill gaps and avoid service duplication. 3.2 The TRT should encourage their memberships to participate in and support action items identified in the strategy.	H/L	TRT/S
4. Maintain a strong TCK management team to ensure long term success.	4.1 Make training opportunities available to management staff on leading edge practices in destination management. 4.2 Complete a succession plan for leadership positions. 4.3 Encourage a workplace of excellence by fostering a strong corporate culture and developing a package of attributes that will attract the best.	H/M	TCK/S

Initiatives	Action Items	Priority/Cost	Lead/Timeline
5. Improve measurement of the economic impacts of tourism in Canmore Kananaskis.	5.1 Gather baseline data that will help measure the impact of tourism (e.g. # of visitors, products/services sold, etc.). Agree upon key indicators that will be used. 5.2 Update the 2016 Tourism Economic Impact Study in 2021 to benchmark the Canmore Kananaskis tourism industry.	M/M	TCK/M
6. Maintain a strong understanding of the ongoing needs of businesses and the community.	6.1 Complete an annual TCK member satisfaction survey. 6.2 Survey non-member businesses in the community every second year to better understand their needs as they relate to tourism services. 6.3 Survey the public every second year to better understand their needs as they relate to tourism.	H/L	TCK/ongoing

## Move Forward with a Triple Bottom Line Approach

*GOAL #3: Create a sustainable framework for tourism development that will ensure long term economic, social and environmental viability.*

**Opportunity Overview:** As identified through the strategic planning process, there appears to be widespread agreement that sustainability is of critical importance to the success of the strategy. Community members support the triple bottom line approach that seeks common ground among its three pillars (social, environmental, economic). All solutions proposed need to consider the short, medium and long term impact on sustainability.

Initiatives	Action Items	Priority/Cost	Lead/Timeline
1. Develop and implement a destination-wide sustainable tourism program for Canmore Kananaskis that includes the triple bottom line approach. !	1.1 Evaluate options for sustainable tourism programs and implement the program that will best meet the needs of Canmore Kananaskis. Standard programs and customizable options should be considered in the evaluation. The region may opt for a fully customized program.	H/H	TCK + ToC + AP/S
2. Identify and communicate the benefits of the triple bottom line approach. !	2.1 Develop a business case for the triple bottom line approach that would prove the economic, social and environmental return on investment for the community.	H/M	TCK/S

Initiatives	Action Items	Priority/Cost	Lead/Timeline
3. Increase the knowledge and capacity of tourism stakeholders in regards to sustainability. !	3.1 Organize and deliver triple bottom line training that will help create a shared understanding of sustainability among stakeholders. 3.2 Organize a group of key local tourism stakeholders to attend the 2020 IMPACT Sustainability Travel & Tourism Conference in Victoria, BC.	M/L	TCK/S
4. Implement a sustainable funding model for TCK. !	4.1 Develop a membership fee structure that encourages multi-year commitment from members to build confidence in the organization. 4.2 Make a compelling and irresistible case for local businesses to invest in TCK through the purchase of a membership. 4.3 Develop formal mechanisms to discourage the risk of dissolution and encourage investor confidence in TCK. 4.4 Make every effort to be an inclusive organization that has broad representation and diverse revenue sources. 4.5 Develop a sustainability fund that can be used to compensate for future revenue fluctuations.	H/L	TCK/S
5. Measure the impacts of using the triple bottom line approach.	5.1 Develop a triple bottom line sustainability scorecard and agree upon performance measures. 5.2 Tie the scorecard to management performance plans. 5.3 Re-evaluate the scorecard at least once per year.	H/L	TCK/ongoing
6. Promote sustainable visitor behaviours in Canmore Kananaskis.	6.1 Develop a visitor education program that will improve the sustainability of visitor behaviours. 6.2 Ensure the program is being communicated effectively to visitors. 6.3 Encourage operators to develop tourism experiences that support sustainability.	H/M	TCK + All/ongoing
7. Research the indicators and effects of potential overtourism in areas of Canmore Kananaskis and mitigate negative impacts.	7.1 Assess areas of Canmore Kananaskis that receive a high amount of visitor traffic. 7.2 Identify indicators of overtourism (this may be included in the sustainability strategy). 7.3 Identify the carrying capacity of the region. 7.4 Develop a plan to mitigate any negative impacts of overtourism.	M/M	ToC + All/S

Initiatives	Action Items	Priority/Cost	Lead/Timeline
8. Understand the needs of tourism workers in Canmore Kananaskis and support efforts to meet their needs.	8.1 Encourage businesses to conduct staff surveys and share results with the TRT. 8.2 Continue to work collaboratively with partners and lead efforts to address affordable housing challenges. 8.3 Encourage local businesses to collaborate on solutions to meet the needs of their staff.	H/L	TRT/ongoing
9. Ensure that all new major projects have strong business cases to support them.	9.1 Develop detailed business cases for new major projects. 9.2 Ensure business cases are developed in collaboration with applicable partners.	H/H	All/ongoing

## Develop and Promote Experiences

*GOAL #4: Develop and promote outstanding visitor experiences that will position Canmore Kananaskis as a destination of choice for those who seek to immerse themselves in our authentic mountain lifestyle and vast wilderness.*

**Opportunity Overview:** The tourism industry in Canmore Kananaskis operated without an established DMO from 2016 to 2018. That said, the destination has remained busy during the high summer season. Promoting the region's outstanding visitor experiences and developing new, niche products focused on the off and shoulder seasons will ensure Canmore Kananaskis becomes a destination of choice for travellers seeking an authentic mountain experience throughout the year.

Initiatives	Action Items	Priority/Cost	Lead/Timeline
1. Communicate TCK's value proposition to potential members and visitors. !	1.1 Develop a promotional plan directed at potential members that would communicate the value proposition of the organization and sell memberships or a la carte services. 1.2 Complete a re-brand that would articulate to members and visitors the compelling value proposition of TCK and of the destination as a whole.	H/M	TCK/S

Initiatives	Action Items	Priority/Cost	Lead/Timeline
2. Support excellence in tourism product development, marketing and customer service by implementing training workshops.	2.1 Arrange with ACT, TA and other organizations as identified to bring training workshops to Canmore Kananaskis. 2.2 Ensure VIC staff in Canmore and Kananaskis receive cross-training in order to develop a strong understanding of the region's product offerings. 2.3 Offer annual training opportunities for customer service and other front-line tourism staff.	H/M	TCK/S
3. Gather visitor data on an ongoing basis.	3.1 Complete an annual visitor survey across the destination. 3.2 Complete a PRIZM analysis for Alberta Parks campgrounds. 3.3 Complete a PRIZM analysis for a broader sample of accommodation providers and tour operators. 3.4 Develop and regularly update target market profiles for Canmore Kananaskis' best customers.	H/L	TCK/ongoing
4. Align Canmore Kananaskis tourism products to the Authentic Experienter EQ.	4.1 Encourage experience providers and other tourism-related businesses to align existing products and develop new sustainable tourism products that appeal to the Authentic Experienter EQ.	H/L	TCK/ongoing
5. Develop compelling packages to experience Canmore Kananaskis.	5.1 Encourage experience providers and tourism-related businesses to develop compelling packages for visitors. 5.2 Provide training for operators on how to set up compelling packages (see Initiative 2). 5.3 Maintain the perception of Canmore Kananaskis as a top-tier destination by demonstrating value for money, rather than competing on price alone. 5.4 Develop niche-based MICE offerings/packages to attract high-value customers.	M/L	TCK/ ongoing
6. Develop tour packages that appeal to the FIT market and small bus tour market.	6.1 Collaborate with experience providers and tourism-related businesses to create self-guided and customizable tour packages. 6.2 Include these packaged tour opportunities in future promotional activities.	M/L	TCK/M

Initiatives	Action Items	Priority/Cost	Lead/Timeline
7. Animate Canmore's downtown during weekends throughout the year.	7.1 Consider adding animation to downtown Canmore such as roving entertainment, art displays, sidewalk sales and pocket parks. 7.2 Introduce a destination animation program that would assist businesses in developing their own compelling experiences.	M/M	ToC + TCK/M
8. Assess the need for enhanced on-brand events and/or programming during need periods.	8.1 Encourage third party organizations to complete business cases for new, need period programming. Identify target markets, market demand, required resources, human resource requirements, community impact, partnerships, program, infrastructure requirements and broadly outline logistics.	M/H	TCK/M
9. List Canmore Kananaskis' market ready tourism products on the Alberta Tourism Information System (ATIS 2.0). ★	9.1 Using the tourism asset inventory Canmore Kananaskis as a starting point, identify market ready tourism products. 9.2 Register the identified tourism products on the ATIS website. 9.3 As new market and export ready products are developed in Canmore Kananaskis, add them to ATIS 2.0.	H/L	TRT/S
10. Establish TCK as the primary point of contact for tourism promotion in Canmore Kananaskis. ★	10.1 Inventory current tourism promotional activities taking place for Canmore Kananaskis and review for overlaps and gaps. 10.2 Encourage experience providers and tourism-related businesses to align their marketing efforts with TCK to ensure common messaging and to reduce competition. 10.3 Become known as content experts and the go-to organization for tourism advice.	H/L	TCK/S
11. Improve Canmore Kananaskis' digital and online presence so that it offers compelling and accurate visitor information.	11.1 Update the TCK website to allow for the full functionality of a DMO website (currently underway). 11.2 Ensure that Canmore Kananaskis' online presence is kept up to date with compelling messages and relevant information. 11.3 Enhance the online search optimization of the new TCK website. 11.4 Continue to develop the TCK Digital Asset Library. 11.5 Work with business owners to assist them in aligning their websites with TCK content and brand.	H/H	TCK/S

Initiatives	Action Items	Priority/Cost	Lead/Timeline
12. Market Canmore Kananaskis' tourism offerings to target markets.	<p>12.1 Develop and implement an annual marketing plan that would further identify and focus marketing efforts on high-value target markets with a focus on need periods.</p> <p>12.2 Develop a featured stories online marketing campaign to share experiential stories from around the region.</p> <p>12.3 Secure funding through Travel Alberta's Cooperative Marketing Program in order to amplify local investment in cooperative marketing.</p> <p>12.4 Engage and leverage partnerships with Tourism Calgary and Banff &amp; Lake Louise Tourism on joint marketing and product development campaigns.</p> <p>12.5 Leverage social media channels to build connections with travel influencers and reach target markets.</p> <p>12.6 Organize familiarization tours for media outlets, travel influencers and the travel trade to attract increased visitation during need periods.</p>	H/H	TCK/S
13. Promote the development of high-quality, on-brand, authentic visitor experiences for core customers.	<p>13.1 Develop a set of criteria that can be used by experience providers to identify new products that are high-quality and on-brand.</p> <p>13.2 Create a tourism product development plan. Elements of the plan should include a gap analysis, market analysis, opportunity analysis and implementation plan.</p>	M/H	TCK/M
14. Build regional destination development partnerships.	<p>14.1 Collaborate with Banff &amp; Lake Louise Tourism, Tourism Calgary, Kananaskis Improvement District, Stoney Nakoda First Nation, Municipal District of Bighorn, and Alberta Parks on joint initiatives to develop and promote tourism.</p> <p>14.2 In the short term, work with BLLT to identify a high value, quick win product development or marketing project in which to collaborate on to further build the working relationship between the two organizations and position for future success.</p> <p>14.3 In the long term, assess the benefits and risks of potentially amalgamating with Banff &amp; Lake Louise Tourism to create a regional DMO for Alberta's southern Rockies.</p>	L/L	TCK/L

Initiatives	Action Items	Priority/Cost	Lead/Timeline
15. Explore opportunities for the development of authentic, Indigenous tourism products.	<p>15.1 Coordinate a meeting with the Stoney Nakoda First Nation to gauge their interest in developing tourism.</p> <p>15.2 Work with interested individuals and groups to develop authentic, Indigenous tourism products.</p> <p>15.3 Connect with Indigenous Tourism Alberta (ITA) to access resources and expertise related to Indigenous tourism product development.</p>	M/L	TCK/M
16. Create deeper relationships with existing customers.	<p>16.1 Develop a Brand Advocacy Initiative to foster deeper connections and brand loyalty with core existing customers. The Initiative could include:</p> <ul style="list-style-type: none"> <li>- A customer engagement program or membership program offering special privileges and exclusive opportunities.</li> <li>- Enhanced recognition opportunities for repeat visitors (e.g. thank-you's, gifts, deals).</li> <li>- Enhanced communication with existing customers.</li> </ul>	M/M	TCK/M
17. Improve the attractiveness of Canmore Kananaskis for the VFR traveller market.	<p>17.1 Develop a hospitality ambassador program whereby residents can learn about the area's unique tourism offerings and gain skills to be an informed tour guide for their family and friends.</p> <p>17.2 Consider adding familiarization tours and/or locals nights for residents as part of the ambassador program.</p> <p>17.3 Encourage local tourism operators to offer referral rewards/discounts for residents who bring their family and friends to them.</p> <p>17.4 Develop resources, training and other supports to make it easier for residents to host VFR (e.g. trip planning tools, VFR packages, how to host tip sheets, etc.).</p>	M/M	TCK/M

## Ensure Sound Infrastructure Planning

*GOAL #5: Improve the physical infrastructure of Canmore and Kananaskis to enhance visitor experience, prepare for growth and improve quality of life for residents.*

**Opportunity Overview:** Input from the community engagement process indicated a high degree of concern over the effects of tourism on municipal infrastructure. Congestion and infrastructure pressure will only increase as visitation increases; therefore, it is critical that action is taken to protect and enhance Canmore and Kananaskis' infrastructure.

Initiatives	Action Items	Priority/Cost	Lead/Timeline
1. Develop innovative and sustainable ways to move visitors and residents throughout Canmore Kananaskis.	<p>1.1 Assess the feasibility of adding shuttle bus services to downtown Canmore, as well as to other areas of the Bow Valley (e.g. Kananaskis, accommodations, attractions, etc.).</p> <p>1.2 Plan proactively for tourism infrastructure and prominently consider long-term tourism development in all infrastructure and transit planning.</p> <p>1.3 Ensure tourism representatives attend transportation and parking workshops related to Integrated Parking Management, Integrated Transportation Planning and Town Centre Enhancement to provide their input and keep abreast of new initiatives and future plans.</p> <p>1.4 Encourage businesses to support/provide environmentally friendly modes of transportation for visitors (e.g. rental or complimentary bikes at hotels, block transit passes for hotel guests, shuttle buses to attractions and downtown areas, bike parking near shops, sharing information about the transit system, etc.).</p> <p>1.5 Explore the feasibility of developing a pedestrian plaza along main street in Canmore.</p> <p>1.6 Work with regional partners, including BLLT, Town of Banff and Parks Canada, to collaborate on transportation management throughout the Bow Valley.</p>	M/M	ToC + TCK + Each Jurisdiction/L

Initiatives	Action Items	Priority/Cost	Lead/Timeline
2. Coordinate tourism development with municipal planning.	<p>2.1 Advocate for the needs of the region's tourism sector during the development of long-term strategies across all functional areas (e.g. infrastructure, planning and development, recreation, parks and culture, economic development, social plans, etc.).</p> <p>2.2 Align requests for tourism development project funding from the Town of Canmore with the municipal budget cycle. Requests should be submitted by June for consideration in the Fall.</p> <p>2.3 Continue with further development of affordable housing initiatives currently underway and encourage the development of employee housing.</p>	M/L	TCK + ToC + KID + AP/S
3. Support investment in infrastructure to keep sporting venues world-class.	3.1 Work with representatives from all three levels of government to ensure Canmore Kananaskis' sport venues remain world-class.	H/H	Each Jurisdiction/ongoing
4. Prepare for future tourism development.	<p>4.1 Complete a land assessment in Canmore and the greater Bow Valley to determine what land could be utilized for tourism activities to alleviate future pressures (e.g. passive recreation, tours, infrastructure, developments, etc.).</p> <p>4.2 As park planning for the Bighorn Country moves forward and new assets are developed, examine opportunities to collaborate.</p> <p>4.3 In the long term, revisit the feasibility of developing a large conference centre facility in Canmore.</p>	M/H	Each Jurisdiction/L
5. Engage Alberta Parks, the Kananaskis Improvement District (KID) and Municipal District of Bighorn in complementary initiatives to build sustainable tourism.	5.1 Host an annual planning meeting with Alberta Parks, MDB and KID representatives to share information and plans as well as identify opportunities and challenges.	M/L	TCK + AP + KID + MDB/ongoing
6. Develop funding mechanisms that will ensure key tourism infrastructure is maintained to a high standard.	<p>6.1 Seek opportunities for alternative revenue sources that can be re-invested in infrastructure and visitors services (e.g. day-use fees in Kananaskis Country, parking fees, etc.).</p> <p>6.2 Continue to advocate for resort municipality status to support infrastructure, program development and planning.</p>	H/L	TCK + ToC + AP + KID/ongoing



# Conclusion 09

## Conclusion

The Canmore Kananaskis Community Tourism Strategic Plan lays out a strategic direction that will advance the Destination toward its bold vision to become a leader in sustainable tourism development. There is much work to be done to align efforts and tackle challenges; however, the Region is in a position of strength with outstanding tourism product, engaged markets, a strategic location and energized stakeholder groups. By coming together as a team and committing to a triple bottom line approach, the future will include a high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.

Concerted effort will be required from the business community, governments, NGO's, residents and visitors to achieve the goals put forward by this strategic plan. If you are inspired by the vision and would like to contribute to implementation, please contact Tourism Canmore Kananaskis to get involved.

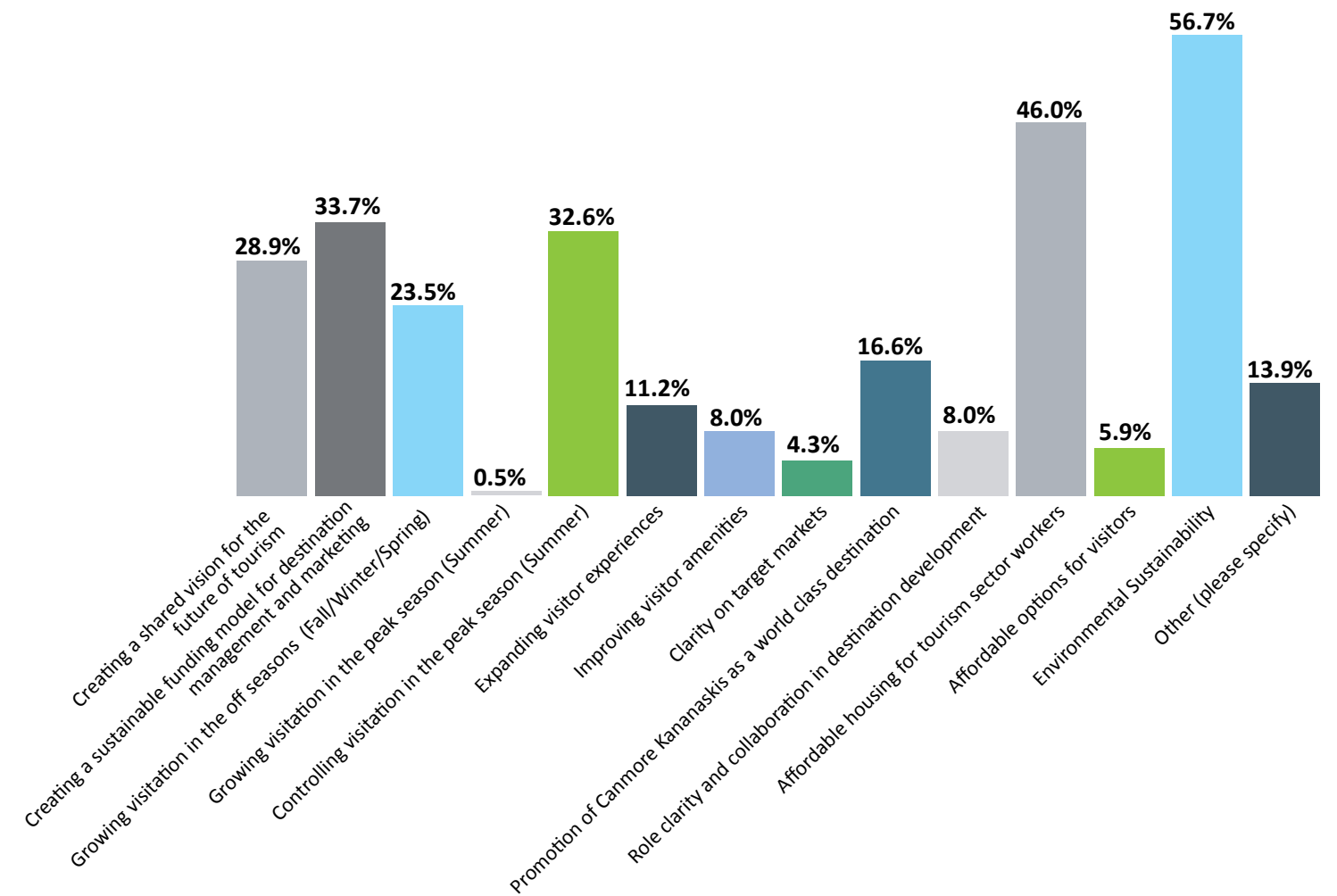


# Appendices

## APPENDIX A: Online Survey Findings (N = 187)

Respondents were asked to identify the most important issues they believed the strategy should focus on. The top three issues that were identified included Environmental Sustainability (56.7%), Affordable Housing (46.0%) and Creating a Sustainable Funding Model for Destination Management and Marketing (33.7%). The least important issues to respondents were Growing Visitation During the Peak Season (0.5%), Clarity on Target Markets (4.3%) and Affordable Options for Visitors (5.9%).

**Question: As we begin developing the tourism strategy for Canmore Kananaskis, what do you think are the top 3 issues we should focus on? You may select up to 3 options.**

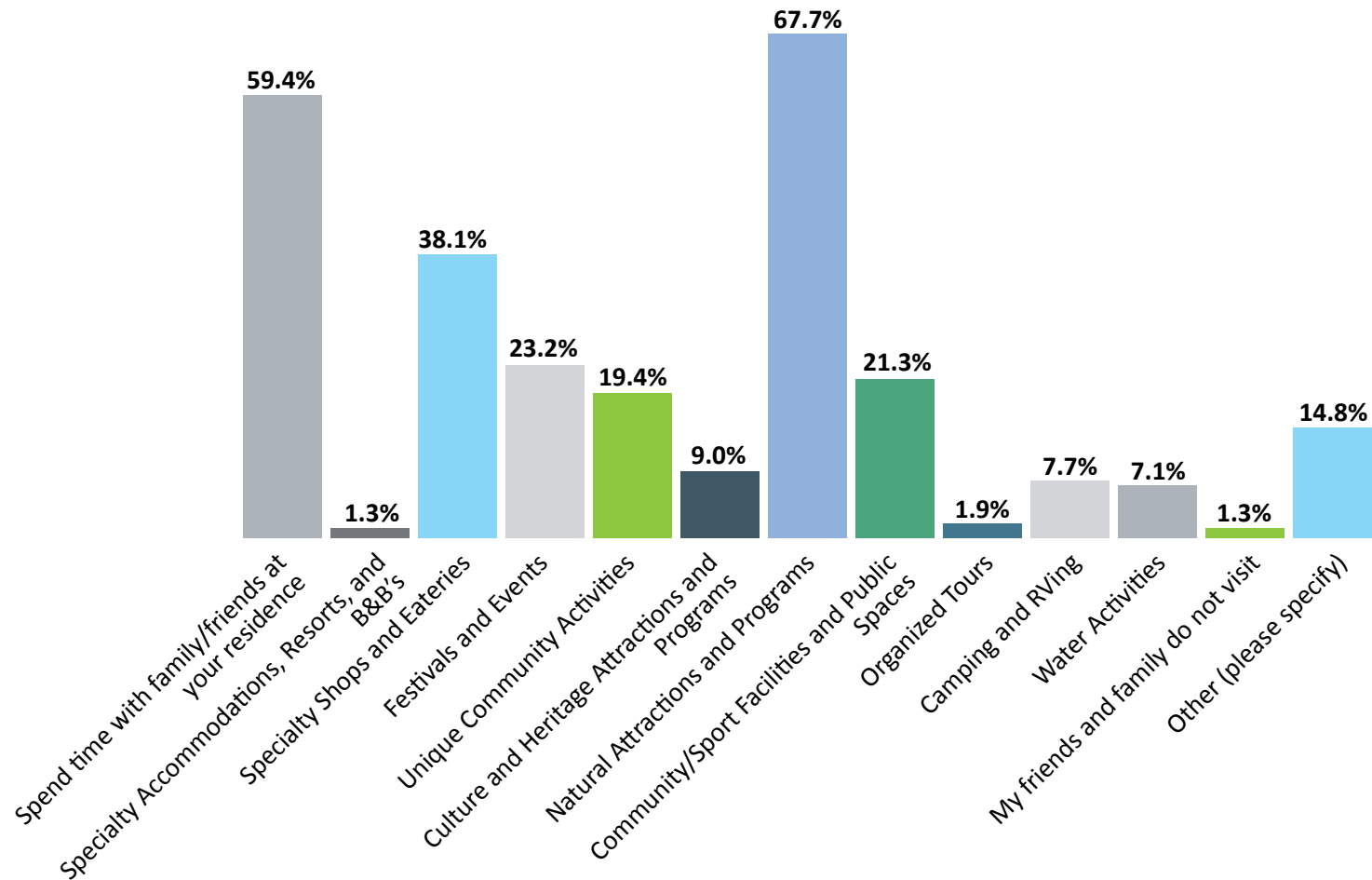


Respondents were then asked to summarize their vision for tourism in five words or less. Responses contained a wide range of variability; however, some themes did emerge. The first was the importance of providing an authentic experience (i.e. the soul of Canmore with its natural beauty and simplicity). There were also two conflicting themes – that of expanding tourism, especially internationally, and also of ceasing the expansion of tourism altogether. There is some clear frustration with the tourism economy of Canmore Kananaskis that has driven some residents to demand less tourism. The issues seem to stem from overcrowding, commercialization, and affordable housing. There are also many on the other side who wish to expand tourism, increase marketing, bring in more international guests, and make Canmore Kananaskis a world-class destination.

When asked if respondents would recommend Canmore Kananaskis to others as a place to visit, the response was overwhelmingly positive (92%) and only some responding no (5%). A similar response came from asking if residents knew enough about Canmore Kananaskis to answer visitors' questions (90% yes) and if residents would invite family and friends to visit (92% yes).

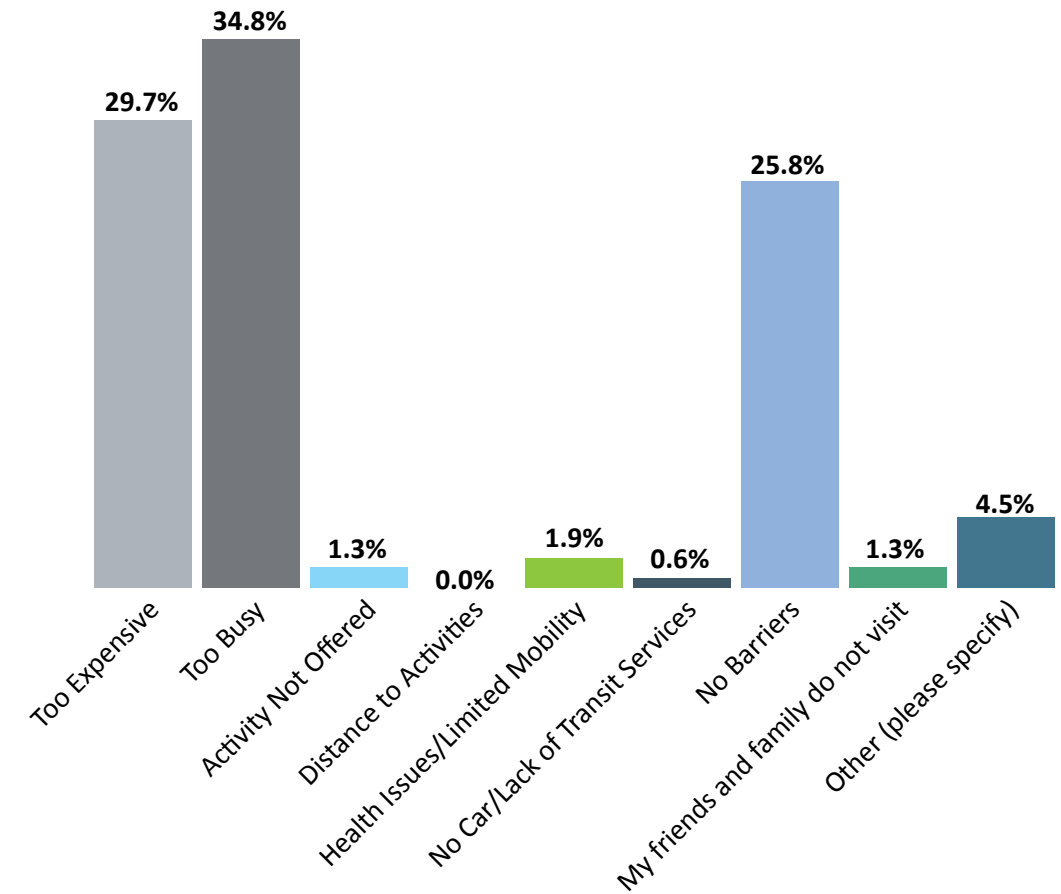
There was significant variety when respondents were asked about the type of activities they enjoy doing with family and friends. Natural Attractions and Programs were the most popular activity (67.7%), followed by Spend Time with Family/Friends (59.4%) and Specialty Shops/Eateries (38.1%).

**Question: What types of activities do you most like to do with friends and family when they visit Canmore Kananaskis? Please select up to 3 options.**



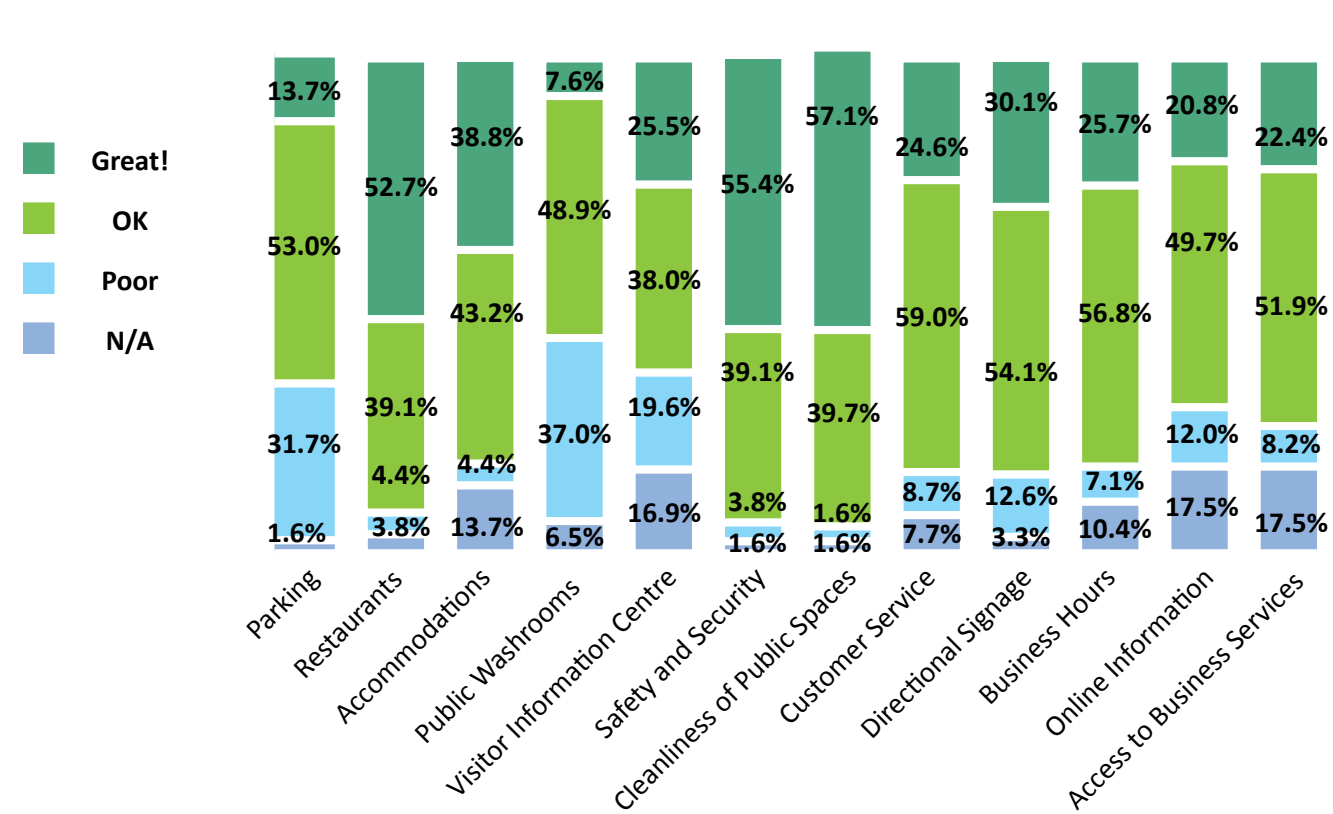
Respondents were asked to identify the most significant barrier that prevents them from participating in these activities. Too busy (34.8%) and Too Expensive (29.7%) were the common answers. 25.8% of respondents indicated that there are no barriers preventing them from participating in their preferred activities.

**Question: When your friends and family visit, what barrier most prevents you from participating in your preferred activities? Please select only one.**



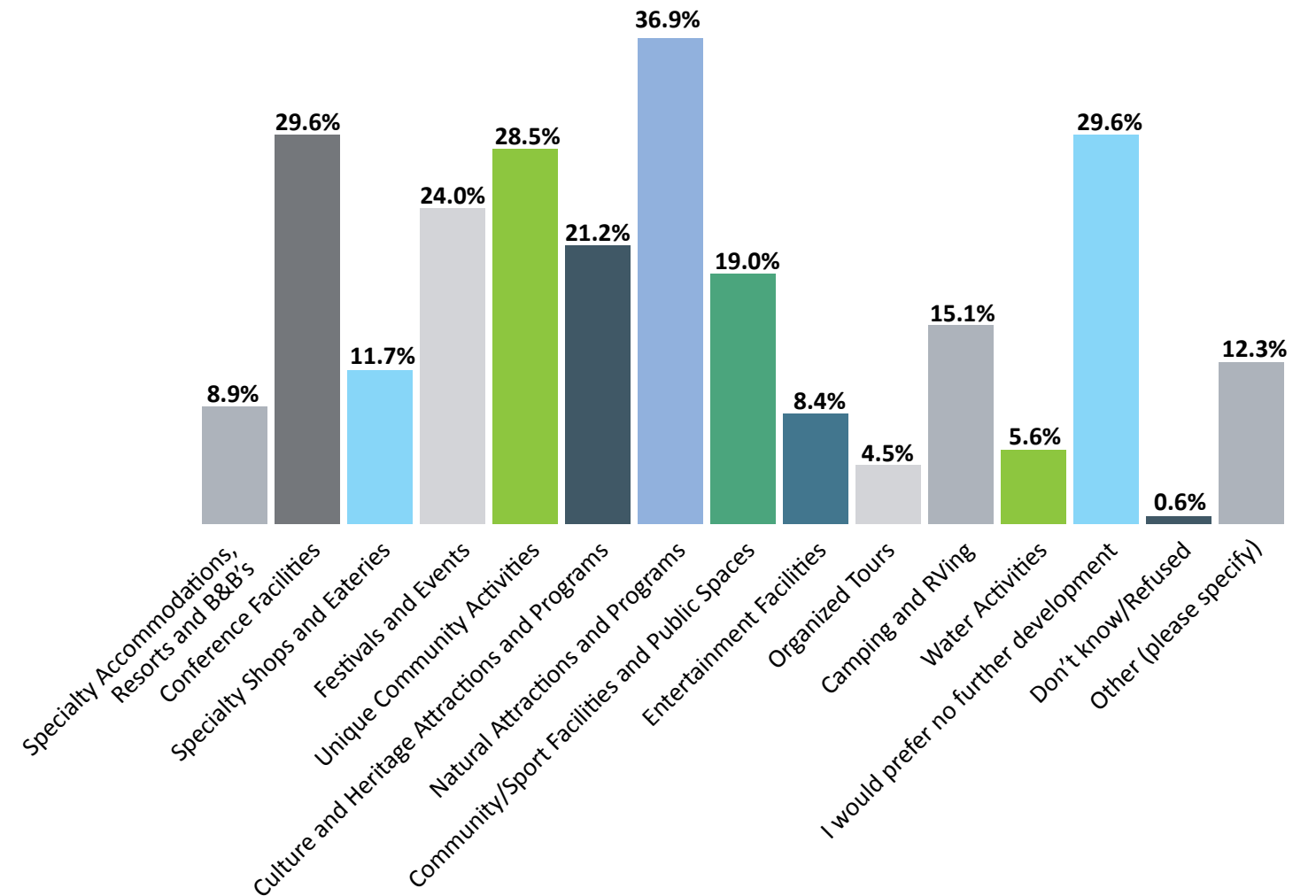
Respondents were also asked to rate services and amenities in Canmore Kananaskis. Overall, the results were positive. Respondents were most satisfied with the Cleanliness of Public Spaces (96.8% Great or OK), Safety and Security (94.5% Great or OK), and Restaurants (91.8% Great or OK). The largest areas for improvement were identified as Public Washrooms (37% Poor), Parking (31.7% Poor) and the Visitor Information Centre (19.6% Poor).

**Question: Please rate the following visitor services and amenities in Canmore Kananaskis.**



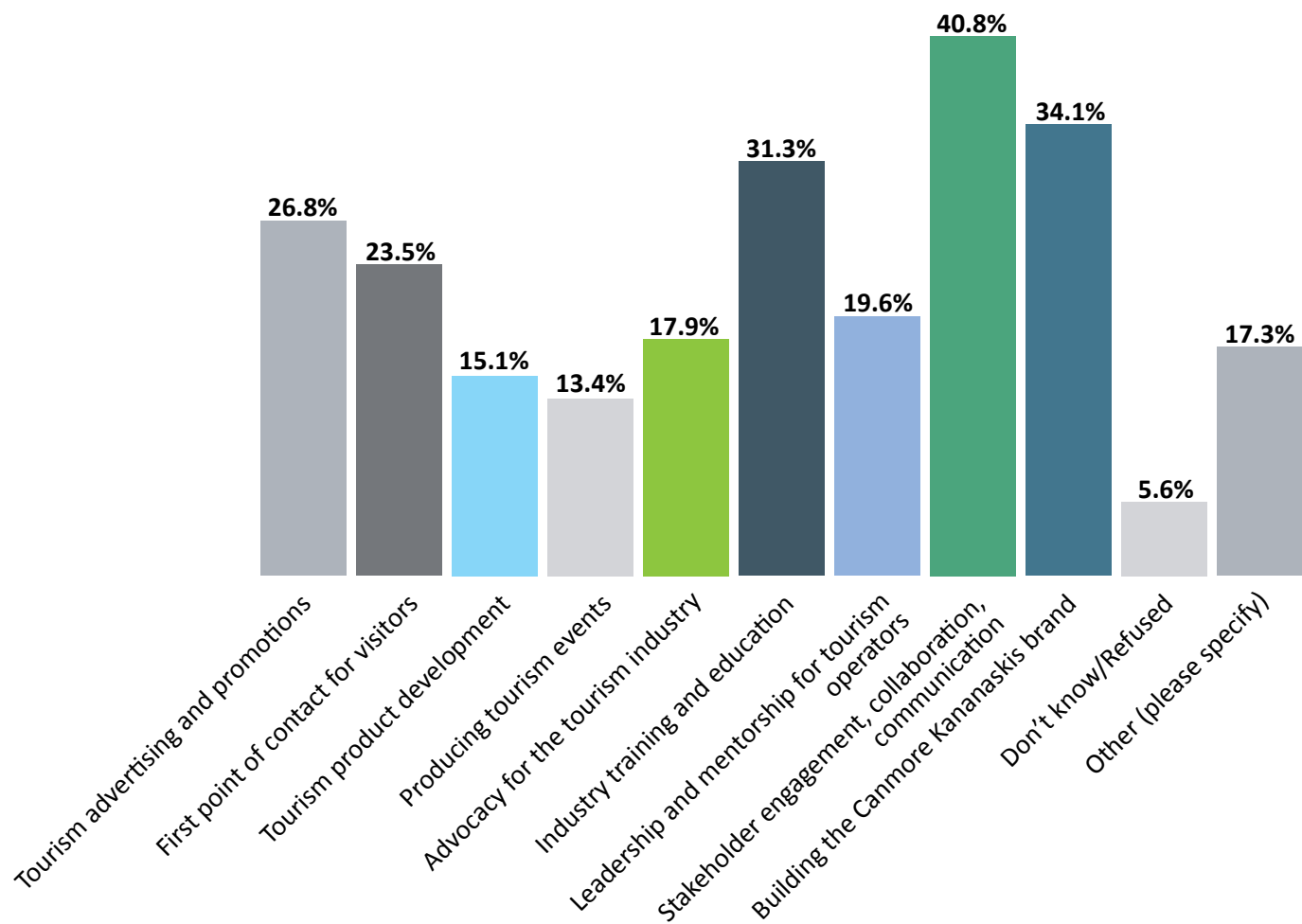
When asked about potential activities for development, respondents' answers varied widely. Popular answers were natural attractions (36.9%), conference facilities (29.6%) and unique community activities (29.6%). It should be noted that 'no further development' was a popular choice among respondents (30%).

**Question: What types of activities have the greatest potential to be developed to encourage visitation? You may select up to 3.**



The survey then asks respondents to comment on the areas TCK should focus on in the first five years. The most commonly chosen focus areas were stakeholder engagement, collaboration, and communication (40.8%), building the Canmore Kananaskis brand (34.1%), and industry training and education (31.3%). The least chosen services included producing tourism events (13.4%), tourism product development (15.1%) and advocacy for the tourism industry (17.9%).

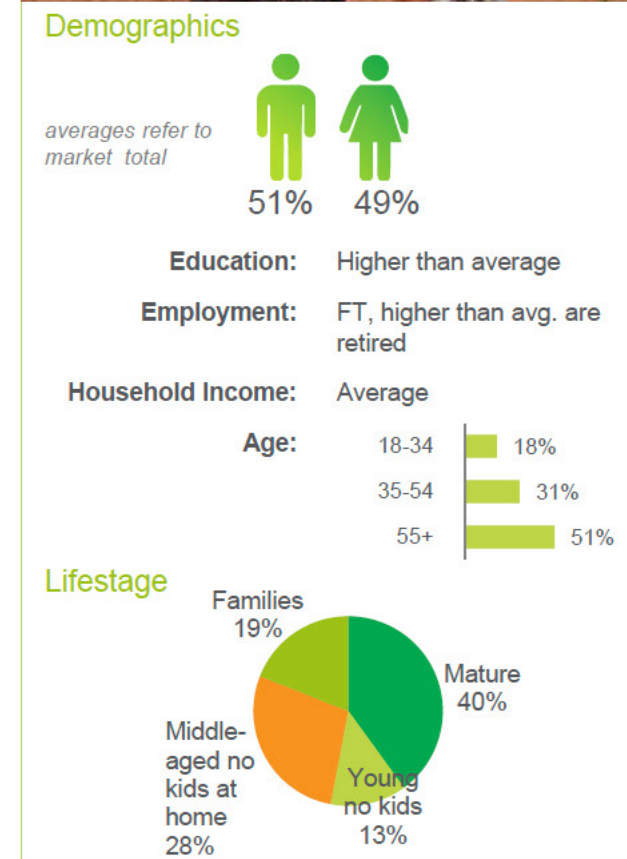
**Question: In your view, what are the primary services this organization should focus on in the first 5 years of operation? You may select up to 3.**



To conclude the survey, respondents were asked an open-ended question about the one thing they would do to improve tourism in Canmore Kananaskis. The answers had several themes. One of the most common was sustainability of both the economy and environment. Residents and business owners want to see a sustainable plan that will not negatively impact the environment and nature. They recognize the importance of the natural beauty of the area, but this is also why a lot of them live there. They want to see it remain unadulterated as this is what they see as the soul of Canmore Kananaskis. They also want a sustainable economy. There are known issues of affordability for residents and they fear it will get worse with further development. Another key theme was collaboration. They want to see the businesses and TCK collaborate on a coherent tourism strategy in order to build the brand and market Canmore Kananaskis as a world-class destination. The third most popular theme was taking care of the little things. Residents feel that a lot of little things are slipping through the cracks such as washroom facilities, parking, traffic flow, and generally improving the events that Canmore Kananaskis currently hosts.

## APPENDIX B: Explorer Quotient Profiles

Canada  
**Authentic Experiencers**  
 12% of Canadian Market



*Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.*

### Social Values

#### Top defining Values

**Personal Control:** They are focused on maintaining control and autonomy in their lives. Many are retired, with time to do the things they want to do.

**Financial Security:** They feel optimistic about their financial future; more so than global AE's.

**Cultural Sampling:** They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.

**Importance of Spontaneity:** They enjoy the unexpected in life - they welcome and appreciate surprises.

**Ecological Concern:** They are concerned about the health of the planet and what that means to future generations.

#### Bottom defining Values

**Importance of Aesthetics:** With a more functional and pragmatic approach to life they are unlikely to be swayed by beauty or appearance.

**Joy of Consumption:** Although they are relatively affluent and confident financially, they are not avid shoppers, deriving little enjoyment from the act of consumption

### Travel Values

#### An Authentic Experiencer will seek:

**Historic Travel:** They love to learn about and absorb themselves in the history and culture of the places they visit. They will research before they leave and take their time in historic sites and museums.

#### An Authentic Experiencer will avoid:

**Comfort Seekers:** This EQ type does not shy away from living like the locals do. This is more important than staying somewhere with the comforts of home.

**Luxury Travel:** They are unlikely to seek out luxury amenities or gourmet experiences.

**Group Travel:** They prefer to do their own thing.

**Escape:** Travel is not about escape from the day to day, they need not disconnect in order to relax.

**Hedonistic Rejuvenation:** They are unlikely to be carefree and indulgent when traveling – their focus is on learning

## Experience Appeal and Travel Behaviours

### 10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Visiting small towns, villages
4. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
5. Seeing beautiful coastlines, beaches
6. Visiting national, provincial/state parks to visit interpretative centres/museums
7. Visiting well known historic sites and buildings
8. Dining at restaurants offering local ingredients
9. Mountain and glacier viewing
10. Visiting well-known natural wonders

### 3 of the Least Appealing Activities

1. Attending nightclubs/lounges
2. Motorcycling
3. Snowmobiling as an overnight touring trip

### Last Trip

**Party composition & size:** 78% of Canadian AE's took child-free trips (vs. Canadian average of 72%).

**Duration:** Canadian AEs typically take longer trips than the average - 12.7 nights overall and 15.7 nights for long-haul travel.

**Spend:** Canadian AEs have an average per party spend of \$3189 per trip, \$3859 for long-haul..

### Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Websites of online retailers, travel agencies or tour operators
3. Travel guides and books

### Product:

- Historical Travel
- Features opportunities to meaningfully connect with locals
- More low-impact activities, but also some active and hands-on\*
- Authentic, living culture
- Creates opportunities for shared experiences

### Price:

- Reasonable

## Canadian Authentic Experiencers

### Promotion:

- Get people talking – word of mouth or word of mouse
- Traditional media and Internet – more use websites of regional or city tourism offices
- Practical details
- Catered to older demo
- Non-touristy
- Promotion in Travel Guides
- Articles in Newspapers

### Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone

*\*compared to the global Authentic Experiencer*

## Free Spirits

13% of the Global Market



### Demographics

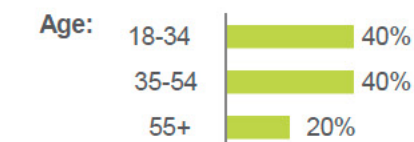


46% 54%

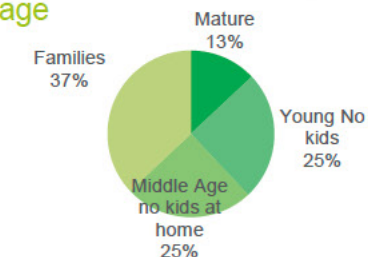
**Education:** Average

**Employment:** FT; above avg. % are students

**Household Income:** Higher than average



### Lifestage



Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

**Personality traits:** Extroverted, driven, open, fun-loving, adventurous

## Social Values

### Top defining Values

**Joy of Consumption:** Free Spirits find shopping highly gratifying. A brand name on a product or service is an indicator of quality, style and status.

**Social Mobility:** Possessing the skills and education to make it happen, Free Spirits are highly motivated to advance in life and work.

**Attraction for Crowds:** Free Spirits are one of the most social of all EQ types. Adept at networking, they enjoy large group atmospheres (as well as one-on-one conversations). Interacting with others gives them the chance to learn about themselves.

**Penchant for Risk:** They are confident risk-takers, secure in their ability to reach their goals no matter what obstacles they may face.

**Happiness:** Free Spirits consider themselves happy and full of vitality for life.

**Need for Status Recognition:** They want to show their success off to the world.

### Bottom defining Values

**Buying on Impulse:** They love to shop but they are not impulsive - they'll shop around to get exactly what they're looking for.

**Skepticism Towards Advertising:** Free Spirits have confidence in advertising and will entrust professionals to help them with major purchases or planning.

**Aversion to Complexity:** Free Spirits have a zest for life and are not intimidated by changes or complexities in society. Being spontaneous is thrilling and fun for them.

## Travel Values

*The Free Spirit is the traveller's traveller...they seem to love everything about travel and as in life, they embrace the experiences it offers with arms wide open.*

### A Free Spirit will seek:

**Constant Comparison Travel:** Love to travel – and brag about the superiority of the places they have visited

**Luxury:** Often aspire to stay in the most luxurious accommodations and venues.

**Hedonistic Rejuvenation:** Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

**Checklist Samplers:** Want to see all the main attractions, but not in depth – they will employ detailed itineraries, ensuring that they don't miss anything!

**Shared Experiences:** Attracted to groups where they can socialize and share the experience with others – using social media for sharing during and after the trip.

### A Free Spirit will avoid:

**Comfort-Seeking:** Free Spirits have a higher penchant for risk, so they are not afraid to try something new or have an adventure

**Reluctant travel:** Not content to experience the world through the Internet or TV.

## Experience Appeal

*Following their energized approach to life and their enthusiasm for travel, Free Spirits are more likely to find many activities appealing to do on a long-haul vacation that most other types.*

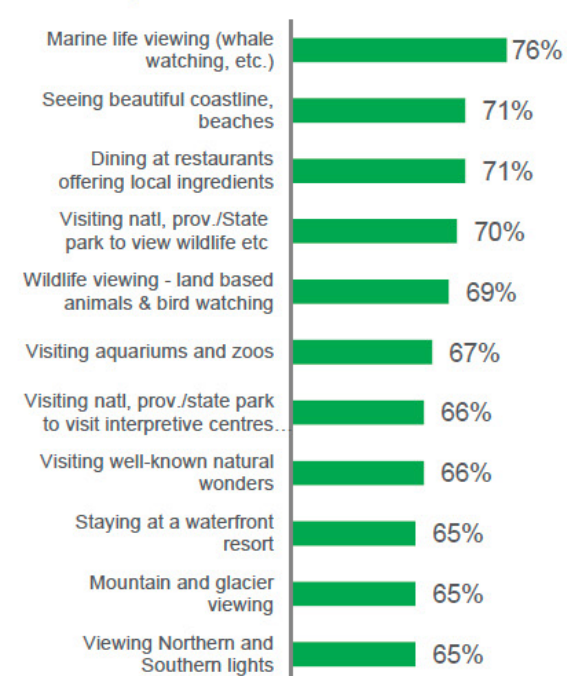
### Free Spirits are more likely than other travellers to be interested in:

1. Shopping, Dining and Other Food-related Activities
2. Entertainment, Performing Arts and Amusement Parks
3. Accommodation-related Activities
4. Water-based Outdoor Activities
5. Festivals, Events & Spectator Sports
6. Outdoor/Nature Sports & Activities
7. Winter Outdoor Activities

### Free Spirits are also interested in:

1. Nature Observation Activities
2. Exhibits, Architecture, Historic Sites/Buildings, Museums
3. Sightseeing Activities
4. Cruises & Touring
5. Hands-on Learning Activities

### Top 10 Most Appealing Activities Among Free Spirits:



## APPENDIX C: Sustainable Tourism Development Tools

Source: Robert Chappell – Tourism Impact Services<sup>68</sup>

Sustainable tourism development can be used as an approach to incorporate environmental stewardship into tourism development. The approach can be implemented by local businesses and/or destination managers and has been proven successful in destinations across the globe. There are a number of impactful strategies available so it is important to determine your objectives and desired outcomes early in the planning process to ensure sustainable tourism initiatives will have the greatest opportunity for success. Potential options to encourage sustainable tourism development include:

**Sustainability Self-Assessment** – This is the simplest approach to establish a baseline, identify challenges, and begin planning for action. The self-assessment can be done for businesses and destination managers with the only difference being the criteria used during the assessment. For example, business sustainability criteria will typically focus on the business operations while the destination criteria focus on municipal level policies. There are also two ways to approach the criteria used in either assessment: 1) use readily-available internationally-recognized sustainability standards; or 2) develop a set of sustainability criteria that are the most applicable to the situation or can best deliver on the desired outcomes. The assessment can be deployed using an open-source survey tool like Google Forms. Results are collected, analyzed and provided in a simple dashboard for easy distribution.

**Business Training Program** – Business training workshops are not a new concept, but the idea is to develop a series of modules which focus exclusively on sustainable development. In many successful cases, business training programs provide hands-on training to help businesses prepare for certification. Modules cover topics such as policy development, green purchasing, energy conservation, waste diversion, cultural heritage, biodiversity conservation, and any other topic important to the destination and local brand.

**Monitoring Program** – A monitoring program focuses on applicable performance indicators for destinations or businesses related to the consumption of resources, economic development, and an array of sustainability impacts. Monitoring programs help in planning for responsible growth by establishing comparable baseline metrics, setting concrete goals for lasting change and communicating these changes to the stakeholders in travel and tourism destinations. To help destinations and businesses successfully plan for tourism development, the use of a cloud-based sustainable management system is suggested to allow users to assess, monitor and report on customizable indicators revolving around sustainability.

**Verification & Certification Programs** – This approach in many ways is a combination of the self-assessment, training, and monitoring programs. What is unique about this type of program is the level of rigor that is required due to the independent verification procedures. Certification is the act of independent confirmation that a certain set of requirements have been met. These actions are described in a sustainability standard which aims to provide visitors with the assurance that a business and/or destination is on the path toward sustainability and has met globally recognized criteria. There are several existing turn-key certification programs for business and destinations. These programs are useful for quickly assessing a program's standard and available resources for training. Many provide advisors to help the applicant through all steps of the certification process. Another approach is to develop your own sustainability standard which includes best practices, criteria, and indicators that are specifically applicable to the destination's needs, objectives, and outcomes. While this option requires more inputs, the end product is a powerful tool for sustainability. The standard can also be submitted for

formal recognition keeping with international best practice of accreditation. Finally, there are a few options for verification. One option is to use the standard as a training tool only and conduct continuous self-assessments to track progress on implementation. A second option includes an internal verification of implementation which provides a higher level of confidence that best practices have been fully implemented. Finally, external verification is completed independently and provides the absolute highest level of confidence that sustainability best practices are being implemented and managed and that continuous improvement is occurring.

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# APPENDIX E: Change Management Strategy

## Overview of the Change

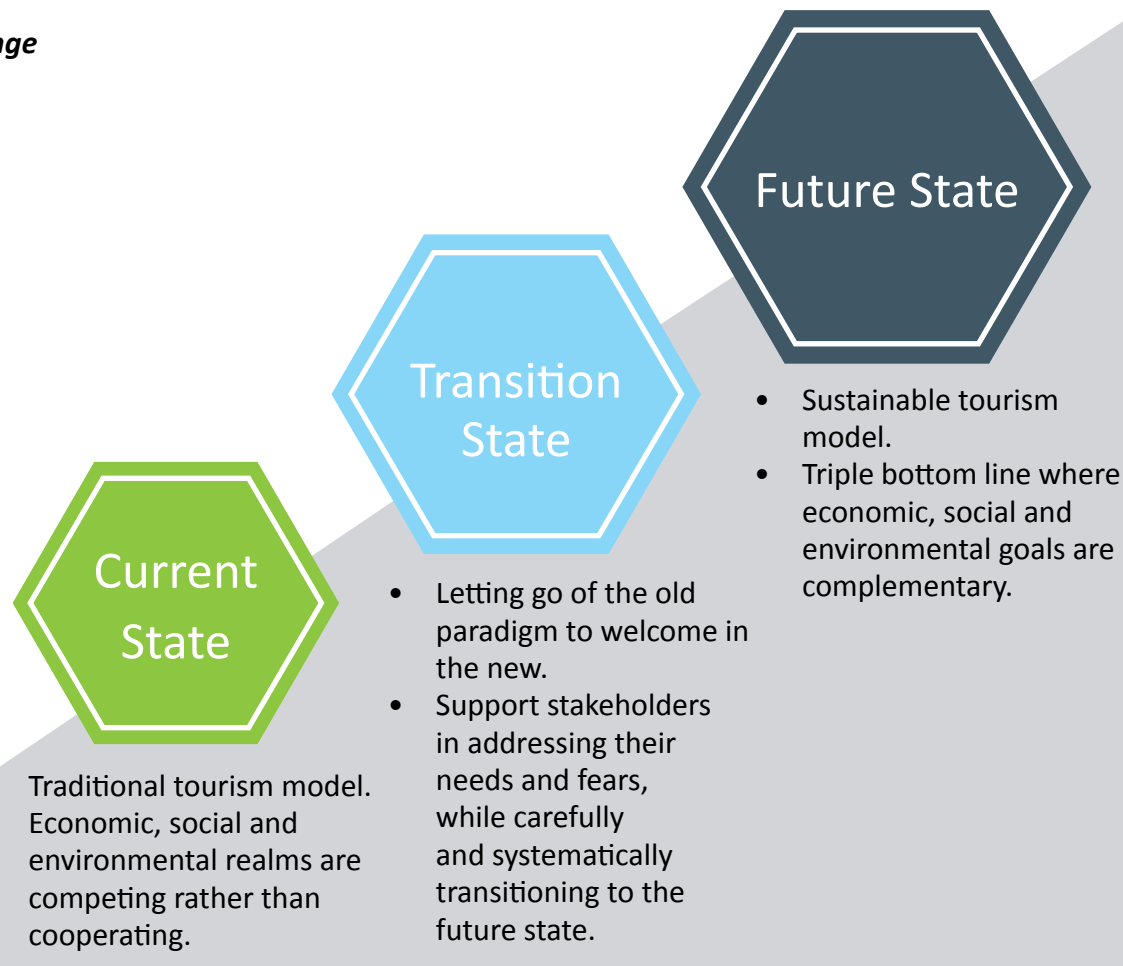
### 10 Year Vision – We will be seen as a leader in sustainable tourism development!

*By 2029, Canmore Kananaskis will be seen as a leader in sustainable tourism development and visitors will be fully engaged in the brand. All stakeholders will be working as one cohesive unit and enjoying the rewards of a destination that has truly embraced a triple bottom line approach including high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.*

This change will be widespread and impact many stakeholders. There is a desire for change from the community at large and if the change is successful this will have considerable benefit for thousands of individuals, including residents, visitors, industry employees, business owners and investors. In order to overcome fear and resistance, a clear path forward is needed.

Figure 1 describes transitioning from a traditional tourism model to a sustainable tourism model. While it is important to recognize the current and future state, this change management plan will help stakeholders make the change while moving through transition.

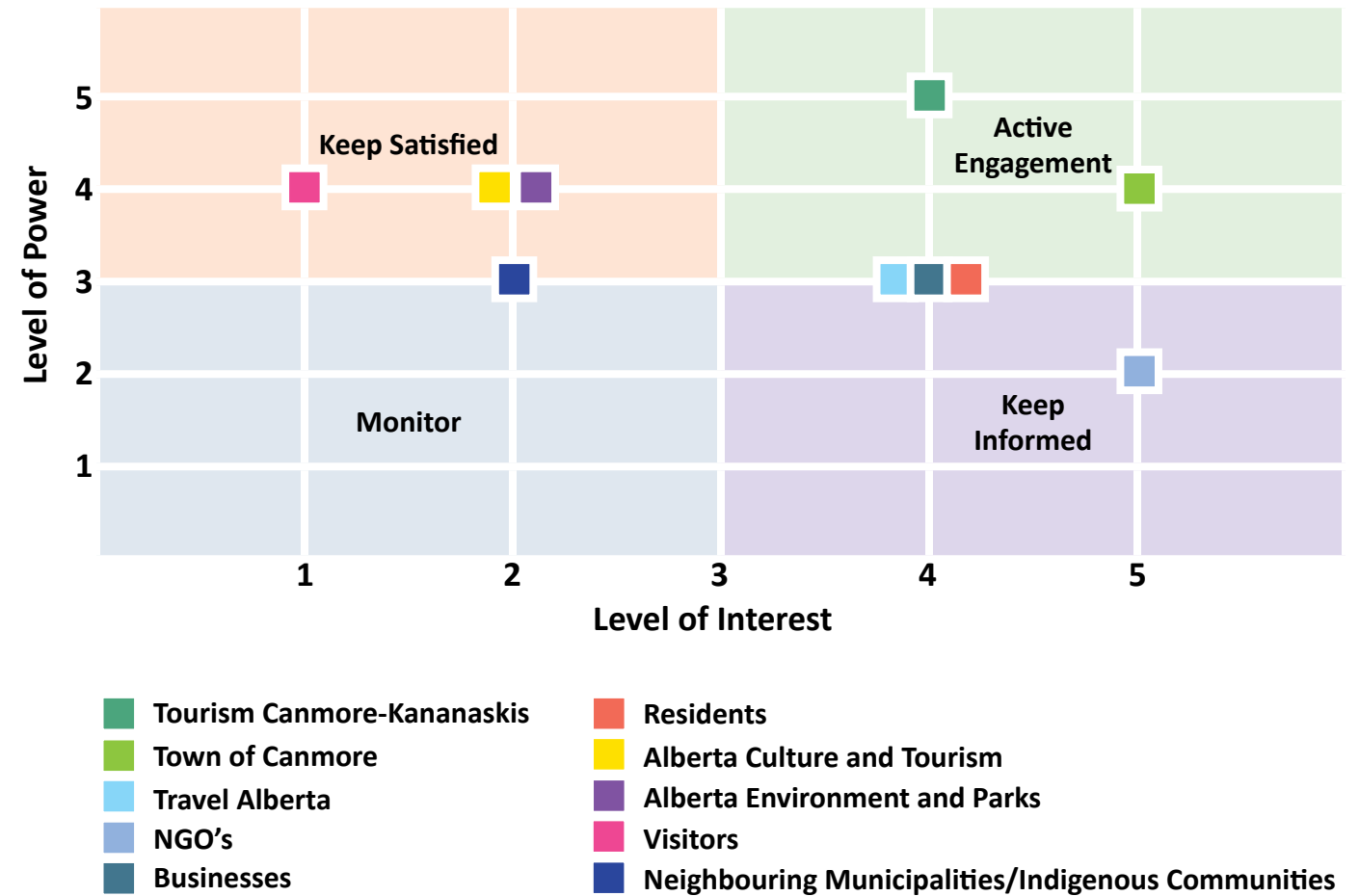
Figure 1. States of Change



There are 10 major stakeholder groups: Tourism Canmore-Kananaskis, Town of Canmore, NGO's, businesses, residents, visitors, Travel Alberta, Alberta Culture and Tourism, Alberta Environment and Parks, and neighbouring municipalities/Indigenous communities. This analysis considers the majority consensus perspectives of the stakeholders, but recognizes that there may be more extreme perspective embedded within.

The following Stakeholder Power/Interest Matrix (Figure 2) plots the stakeholders based on the assessed levels of power and interest. It then provides general guidance toward the level of effort needed to manage the change within each group.

Figure 2. Stakeholder Power/Interest Matrix



The levels of power and levels of interest range from 1 = low, 2 = medium-low, 3 = medium, 4 = medium-high, 5 = high. The basis for concluding levels of power was determined by how close each stakeholder group had to decision-making on the change itself. The basis for concluding levels of interest was determined by various qualitative and quantitative data collected to suggest interest in the change/project (e.g. participation in public forums, surveys, interviews etc.) and is the sole opinion of the consulting team as a starting point for discussion only.

The matrix also offers advice on the degree of effort to engage stakeholders throughout the change process.

- Stakeholders with low to medium power and interest should be monitored.
- Efforts should be made to keep stakeholders satisfied with the change process where they exhibit medium to high power and low to medium interest.
- Stakeholders with medium to high interest and low to medium power should be kept informed on the change process.
- Finally, stakeholders with medium to high power and interest should be actively engaged throughout the process.

## Overview of the Change Management Methodology

When seeking a change, there are important elements to consider: the vision for the change, the goals and objectives to achieve, the stakeholders who will be impacted by the change and the project management plan. These elements support the key milestones and deliverables in building the system for change. To support the people-side of change, this change management strategy utilizes the ADKAR model as outlined in Figure 3.<sup>2</sup>

**Figure 3. ADKAR Model**

A	<b>Awareness</b> of the need for change, specifically why the change is being made and the risk of not changing.
D	<b>Desire</b> to support and participate in the change, influenced by the nature of the change, the degree of control one has over making the change and other motivators..
K	<b>Knowledge</b> of how to change, including the information about behaviours, processes, tools, systems, skills, job roles and techniques needed to implement a change.
A	<b>Ability</b> to implement the required skills and behaviours. Ability is about turning knowledge into action.
R	<b>Reinforcement</b> to sustain the change, including the recognition, rewards and celebration tied to the realization of the change.

An ADKAR assessment can be completed to understanding where barriers might exist in the change process and implementing tactics to address and overcome those barriers.

## Change Management Strategy

Over the next 12-18 months the goal is to create buy-in of the 10 year vision and to encourage action to support it. Awareness and Desire have been identified as the primary and secondary barriers to change for all stakeholder groups. A communications and resistance management plan has been developed to address these barriers together. Knowledge, ability and reinforcement of the change will occur throughout the process.

The key objectives to achieve during the change timeframe will be to:

**Objective 1:** Increase awareness of the current situation and the change.

**Objective 2:** Increase support for the change by tracking results and communicating progress.

This plan describes the targeted communications towards the stakeholder audiences as well as the method and frequency. A key message bank is provided to guide what messages to share, when, to whom and how frequently. This plan has linked each activity to the desired objectives and the ADKAR barriers to address in the change. To support addressing the additional ADKAR barriers, key messages have also been repeated throughout the plan to reinforce the change. Knowledge and ability of the change will be enhanced as progress occurs and active stakeholders execute their roles in the change.

## Change Communications and Resistance Management Plan

Audience	Level of Support <sup>1</sup>	Method and Frequency	Key Message Bank Source	Performance Indicators	Related Objective	ADKAR Barriers Addressed (Direct/Indirect)
Tourism Canmore-Kananaskis, Town of Canmore	Active Engagement	Monthly project meetings	A,B,C,D	Feedback gathered	1, 2	Awareness (Direct)
		Face to face meetings with individual stakeholders, as necessary		Feedback gathered	1, 2	Awareness/Desire (Direct)
Residents, Businesses, NGOs, Visitors <sup>2</sup>	Keep Informed	Initial media release on Tourism Canmore-Kananaskis website and social media	A,B	Website "clicks"	1	Awareness/Desire (Direct)
		Community Presentation at project initiation phase	A,B,C,D	Feedback gathered	1, 2	Awareness/Desire (Direct)
		Quarterly updates on Tourism Canmore-Kananaskis website and social media	A,B,C,D	Website "clicks"	1, 2	Awareness/Desire (Indirect)
		Annual Community Presentation	A,B	Feedback gathered	1, 2	Awareness/Desire (Direct)

<sup>1</sup> Level of Support provides a guide to the type and degree of communication efforts for each stakeholder group.

<sup>2</sup> Visitors will be kept informed even though it does not correlate to the Power/Interest Matrix. By keeping visitors informed they may shift to their level of interest to high as Canmore-Kananaskis starts to realize the vision for sustainable tourism.

Audience	Level of Support <sup>1</sup>	Method and Frequency	Key Message Bank Source	Performance Indicators	Related Objective	ADKAR Barriers Addressed (Direct/Indirect)
Travel Alberta, Alberta Culture and Tourism, Alberta Environment and Parks, neighbouring municipalities and Indigenous communities	Keep satisfied	Official briefing - key messages sent by email upon project completion	A,B	Feedback gathered	1	Awareness (Indirect)
		Semi-annual teleconference per project schedule	A,B,C,D	Participation in teleconference; Feedback gathered; Funding provided per request made		Desire (Indirect)

### Key Messages Bank

The following key messages bank<sup>3</sup> provides specific messages addressing different topics in the change process. Banks A and B support improving awareness of the change. Banks C and D support increasing desire of the change. Messages can be adjusted to represent past, present or future tense. When drafting communications to stakeholder groups, it is recommended that as many topics as possible be included, but also considering how appropriate they might be to the context.

#### A. Key Messages on the Current Situation

Topic	Message
Business Case:	Canmore-Kananaskis is busy during peak visitation months but businesses struggle during shoulder and off-seasons to generate revenue and keep qualified staff.
Case for Change:	Growth in visitation is likely inevitable so it is prudent to develop a cohesive plan to be responsive to the growth rather than reactive.
Risks to not Changing:	<p>Failure to take action and work collaboratively could result in:</p> <ul style="list-style-type: none"> <li>• Over tourism</li> <li>• Degradation of the core value proposition of the community</li> <li>• Decreased quality of life for residents</li> <li>• Negative environmental impacts</li> <li>• Reduced viability for tourism businesses</li> </ul>

## B. Key Messages on the Change

Topic	Message
Change Vision:	Canmore-Kananaskis is a leader in sustainable tourism development.
Scope:	The scope of this change is community wide.
Outcome:	Economic, social and environmental stakeholders work collaboratively towards shared objectives and to realize the vision.
Timeframe and Desired Stakeholder Behaviours	In 12-18 months, stakeholder organizations will: <ul style="list-style-type: none"> <li>• Acknowledge the change</li> <li>• Implement early deliverables in the action plan</li> <li>• Share information openly and willingly</li> <li>• Demonstrate trust in each other</li> </ul>
Business Strategy Alignment:	This change is directly aligned with the Community Tourism Strategy, the Town of Canmore Strategic Plan and the Government of Alberta outcomes and key strategies towards economic diversification.
Drivers:	<ul style="list-style-type: none"> <li>• A change in tourism is inevitable. Stakeholder recognize the need to be proactive rather than reactive.</li> <li>• There is widespread agreement amongst the majority of stakeholders that a sustainable tourism approach is needed.</li> <li>• A clear path forward, early wins and shared successes will support the transition to sustainable tourism in Canmore-Kananaskis.</li> </ul>

## C. Key Messages on How the Change Impacts Stakeholders

Topic	Message
Impact on Stakeholders:	There will be a change in the day to day operations for TCK and the Town of Canmore, but the degree of change is yet to be determined.
“What’s in it for me?” (WIIFM):	<ul style="list-style-type: none"> <li>• Adopting a triple bottom line approach creates an opportunity for win-win-win with all stakeholders.</li> <li>• Environmental perspective: Environmental stakeholders will experience that overall environmental health in the community is continuously improving.</li> <li>• Social perspective: Social stakeholders will experience that a high quality of life is available for all residents, including the tourism workforce.</li> <li>• Economic perspective: Economic stakeholders will experience increased revenues and profits consistently throughout the year.</li> </ul>

Expected Stakeholder Behaviours and Actions	Stakeholders engaged in the change process will: <ul style="list-style-type: none"> <li>• Ensure transparent decision making;</li> <li>• Respect towards all other stakeholders and their needs and wants; and</li> <li>• Actively deliver on results.</li> </ul>
Feedback Opportunities	<ul style="list-style-type: none"> <li>• Project meetings</li> <li>• Surveys targeted at members, businesses and residents</li> <li>• Face to face community presentations</li> </ul>
Expectations of Change	The Community Tourism Strategy is happening and there is a commitment from stakeholders to make this change together.

## D. Key Messages on Progress

Topic	Message
Project Expectations:	<ul style="list-style-type: none"> <li>• The initial project will conclude within 12-18 months</li> <li>• Key deliverables expected during this time frame are: <ul style="list-style-type: none"> <li>• Business Case for the triple bottom line approach is established</li> <li>• The Sustainability Program is developed</li> <li>• The Sustainability Program has begun implementation</li> </ul> </li> </ul>
Progress Reporting	Information on the progress of the change will be made available by: <ul style="list-style-type: none"> <li>• Regular updates at project meetings</li> <li>• Monthly updates at the Tourism Round table</li> <li>• Quarterly updates on the TCK website</li> <li>• Annual community presentation</li> </ul>
Early Success Stories	It will be important to formally share any success stories as part of the plan throughout the change period.

<sup>1</sup> Retrieved and adapted from <https://www.brighthubpm.com/resource-management/81140-what-is-the-power-influence-grid-or-matrix/>

<sup>2</sup> Hyatt, Jeffery. (2006). ADKAR: A Model for Change in Business, Government and Our Community. (pp.2-3). Fort Collins, CO: Prosci Research.

<sup>3</sup> Adapted from <https://blog.prosci.com/communications-outline-for-managers>

## APPENDIX F: Stakeholder Communications Plan

### Purpose

The purpose of this communications plan is to commit to the transparency of the organization to the people and businesses of Canmore Kananaskis and promote active engagement in the goals and direction of the organization.

The organization must:

- Understand stakeholder needs and values as they effect planning and program delivery
- Ensure all different types of stakeholders are heard and make a concerted effort to gather their input
- Plan for engagement in the process of designing and developing services
- Encourage relationships among members, the public, and government

### Process



**Observe:** The organization will look for opportunities. These could be opportunities to educate the public, businesses, or visitors. It could also be an opportunity to ask questions and gather information from stakeholders. Plan for engagement in the process.

**Engage:** TCK will engage stakeholders at every level in order to determine their needs. This could be for support, an issue with program delivery, the need for education, or whatever may arise. Ensure everyone is heard and every concern is addressed.

**Decide:** TCK takes this information, analyzes the situation, and makes a decision on what to do with it. This could be an adjustment to program delivery, information, processes, brand image, or anything that stakeholders require of TCK. The organization must serve its stakeholders in order to best serve the community.

**Act:** After deciding what to do, TCK must make a plan and act.

**Repeat:** The process does not end after one cycle. TCK must go through the process continually in order to best serve stakeholders and ensure a responsive organization.

### Key Stakeholder Groups

1. Tourism Canmore-Kananaskis
2. Town of Canmore
3. Businesses
4. Residents
5. NGOs
6. Travel Alberta
7. Alberta Culture and Tourism
8. Alberta Environment and Parks
9. Visitors
10. Neighbouring municipalities and Indigenous communities

### Key Messages

- *The 10 Year Vision – By 2029, Canmore Kananaskis will be seen as a leader in sustainable tourism development and visitors will be fully engaged in the brand. All stakeholders will be working as one cohesive unit and enjoying the rewards of a destination that has truly embraced a triple bottom line approach including high quality of life for residents, strong income for businesses and a commitment to environmental sustainability.*
- *Tourism is an important and growing part of the economy. We must acknowledge and proactively harness it in a way that works for Canmore Kananaskis.*
- *The best way to benefit everyone is to work together. There is tremendous advantage in economy of scale when businesses and the community as a whole collaborate.*
- *What we will need in the future is different than what we needed in the past. The scope for this change is community-wide and therefore, we need to look forward and build momentum as one community.*
- *This is an opportunity to make your needs heard.*
- *TCK is eager to hear from everyone so that their services may be better informed and delivered.*
- *We will embrace the triple bottom line approach where economic, social, and environmental goals are complementary.*
- *We have a high level of respect for wildlife and human coexistence.*
- *The social and environmental brand of Canmore Kananaskis is an important aspect of tourism and the visitor experience.*

### Moving Forward

TCK serves the businesses of Canmore and Kananaskis and needs to ensure its direction, programming, and service delivery are aligned with the needs of the membership. TCK will assign the following responsibilities to staff resources:

- Create and maintain communications on behalf of TCK to the membership.
- Attend meetings that can potentially impact tourism and business in Canmore Kananaskis in order to bring the concerns of membership forward as well as disseminate important information.
- Point of contact for media and inquiries.
- Liaise with stakeholder groups to gather and disseminate information.
- Manage and organization information within TCK so it is easily accessible.
- Clearly communicate the brand and value proposition of TCK.

## Tactics

- Surveys are an important information gathering tool and are an effective way to inform TCK of its success in communication strategy. They can target member businesses, non-members, visitors and the public to ensure a wide range of voices are heard. Surveys can be annual or as needed with items including but not limited to:
  - Satisfaction with TCK’s services
  - Ideas for improvement
  - Demand for services
- Monthly Tourism Round Tables as a mechanism to ensure collaborative implementation of the strategy.
- Presentations to Town Council and the Board of Directors of organizations impacted by the strategy.
- Design and create a tradeshow booth to attend community events throughout the region to increase awareness of the Community Tourism Strategic Plan and the services offered by TCK.
- Post quarterly updates on the TCK website reporting the progress on the strategy.
- Host an annual “Report to the Community” presentation that celebrates achievements and describes the next steps of the strategy.
- Host an annual Tourism Planning Summit for public and private stakeholders to gather their input on tourism-related opportunities and challenges. This event could coincide with the Report to the Community presentation.
- Develop an industry portal on the TCK website where member businesses can learn about one another, engage with each other, and share information, resources, and ideas.

## Tools

- TCK Website
- Social Media (i.e. Facebook, Twitter, Instagram, etc.)
- Digital media
- Local print media
- Print media in target market areas
- Media releases

## Desired Outcomes

1. Businesses and the community at large feel they are well-informed about issues relating to Tourism.
2. Members feel engaged and heard in the process.
3. TCK is known as a leader in destination management in Canmore Kananaskis.

## Measuring Success

As part of the observation stage in the process, TCK should evaluate its ability to deliver on the desired outcomes. Website and social media click-through rates will be important to monitor engagement with target markets. Success within the community can be determined from surveys and engaging with the public and businesses. Metrics should be tied to targets and indicators within the reach of TCK. Results should feed the “observe” stage of the communications process in order to develop a plan for improvement, or building on achievements.