



What We Heard Report

Strathcona County Tourism Strategy and Implementation Plan



April 8, 2020

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

Dear Mr. MacDonald,

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

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

Sincerely,

A handwritten signature in blue ink, appearing to read "Justin Rousseau".

Justin Rousseau, Managing Director
Expedition Management Consulting Ltd.

TABLE OF CONTENTS

EXECUTIVE SUMMARY5

01 PROJECT OVERVIEW.....17

 Scope of the Report.....19

 Project Background19

 Process.....21

 Overview of Public Engagement Activities.....22

02 PUBLIC ENGAGEMENT PROCESS RESULTS.....25

 Resident Survey28

 Tourism Stakeholder Survey.....41

 Stakeholder Input Tourism Cafés.....49

 Public Engagement Station57

 Staff Input Sessions.....57

 Tourism Stakeholder Interviews.....60

 Strathcona County Council Interviews.....66

03 NEXT STEPS73

APPENDICES.....77

 APPENDIX A: SWOT and STEEP Analysis.....79

 APPENDIX B: References84

ACKNOWLEDGEMENTS

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

EXECUTIVE SUMMARY

SCOPE OF THE REPORT

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

OVERVIEW OF RESEARCH

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

Figure 1. Participation in Engagement Activities

PUBLIC ENGAGEMENT ACTIVITY	NUMBER OF PARTICIPANTS
Resident Survey	281
Stakeholder Survey	15 groups represented
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Total	393





KEY THEMES FROM ALL PUBLIC ENGAGEMENT INPUTS

The following describes 8 key themes that were synthesized from all of the engagement inputs received from stakeholders to date.

1. STRONG SUPPORT FOR TOURISM DEVELOPMENT AMONG MANY STAKEHOLDER GROUPS

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

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

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

3. NEED FOR A UNIFYING VISION

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

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

4. ORGANIZING FOR TOURISM DEVELOPMENT

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

5. WILLINGNESS TO COLLABORATE AND PARTNER

There was a clear sense of optimism and a desire to work together to achieve tourism objectives. Stakeholders recognized that no single group can develop tourism by themselves. They understood that for tourism to reach its full potential, multiple sectors and a broad range of stakeholders will need to be engaged. The benefits of collaboration and partnerships, such as leveraged resources, information sharing and enhanced communication, were described by stakeholders.

6. LACK OF TOURISM PRODUCTS AND OPERATORS

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





7. OPPORTUNITIES FOR PRODUCT DEVELOPMENT

The following opportunities for product development were identified through the community engagement process as having the highest potential for development in Strathcona County.

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

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

Festivals and Events – Strathcona County hosts Canada Day, Patio Series, PlayDays throughout the year and separate community led events such as the Highland Gathering, Canadian Birkebeiner Ski Festival, numerous fun runs, tractor pulls, tradeshow and more. These events are supported by excellent indoor and outdoor spaces, such

as Festival Place and Broadmoor Lake Park. In addition, the sport groups in the community are motivated to showcase their athletes and their community through regional, provincial, national and international sport competitions.

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

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

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

8. ENHANCED TOURISM MARKETING

Stakeholders expressed a strong desire for enhanced tourism marketing in Strathcona County. They recognized the importance of having a clear tourism brand, specified target markets and coordinated marketing activities. Tourism-related businesses and organizations see a distinct opportunity to align tourism marketing activities to reach larger audiences and attract more visitors.

NEXT STEPS

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

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



1

PROJECT OVERVIEW



SCOPE OF THE REPORT

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

PROJECT BACKGROUND

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

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

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



PROCESS

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



OVERVIEW OF PUBLIC ENGAGEMENT ACTIVITIES

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

1. Surveys Administered:

- a. Strathcona County Resident Survey (281 responses)
- b. Strathcona County Stakeholder Survey (15 responses)

2. Meetings Conducted:

- a. Sub-Committee Project Meetings
 - Dates: July 24, 2019; September 9, 2019; October 9, 2019; December 18, 2019; February 20, 2020.
 - Purpose: project management and input.
 - Membership: Strathcona County - Richard MacDonald, Shane Olson, Jennifer Moncion, Sarah Geisler; Expedition Management Consulting - Maxwell Harrison, Justin Rousseau
- b. Steering Committee Meeting
 - Date: October 2, 2019
 - Purpose: inform the committee of the process and gain input.
 - Membership: Shane Olson, Richard MacDonald, Russ Pawlyk, Suzanne Lobb – Strathcona County; Todd Banks – Sherwood Park & District Chamber of Commerce; Jaspreet Bhatia – Marriott Townplace Suites; Brian Ilnicki – Beaver Hills Biosphere; Caryn MacGregor – Strathcona County Museum and Archives; Rick Barr – Barr Estate Winery; Michael Callihoo – The Keg.

- c. Stakeholder Input Tourism Cafés (x2)
 - Date: November 14, 2019
 - Purpose: inform stakeholders of the process and gain input on opportunities, challenges and future vision.
 - Number of Attendees: 23
 - Groups Represented: 16
- d. Public Engagement Station
 - Date: November 14, 2019
 - Purpose: collect resident surveys and gain input from the public.
 - Number of Attendees: 21
- e. Staff Input Sessions (x2)
 - Date: January 15, 2020
 - Purpose: inform staff of the process and gain input.
 - Number of Attendees: 26
 - Departments Represented: 8

3. Tourism Stakeholders Consulted:

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

Municipal Government:

- 1. Strathcona County Council
- 2. Strathcona County Administration

Local Stakeholder Groups:

- 3. Economic Development and Tourism Advisory Committee
- 4. Sherwood Park and District Chamber of Commerce
- 5. Beaver Hills Biosphere
- 6. Strathcona Wilderness Centre
- 7. Strathcona County Museum and Archives

- 8. Arts and Culture Council of Strathcona County
- 9. Volunteer Strathcona
- 10. Mennonite Heritage Farm
- 11. Sherwood Park Highland Gathering
- 12. Erin DiLoreto

Local Businesses:

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

External Stakeholder Groups:

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

2

PUBLIC ENGAGEMENT PROCESS RESULTS

SUMMARY OF PUBLIC ENGAGEMENT ACTIVITIES

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

Figure 1. Participation in Engagement Activities

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RESIDENT SURVEY

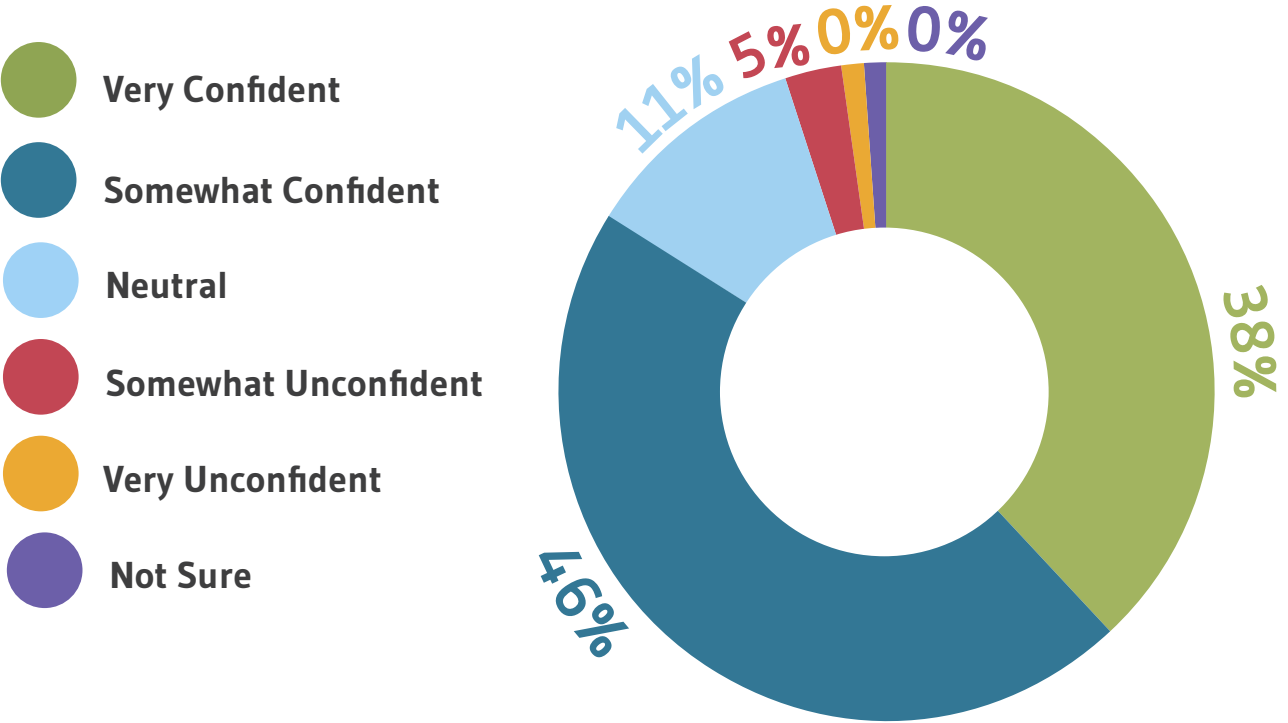
The resident survey was conducted between October 30, 2019 and November 20, 2019. The objective of the resident survey was to gain a deeper understanding of resident perspectives in relation to tourism development in the County.

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

FINDINGS FROM THE RESIDENT SURVEY

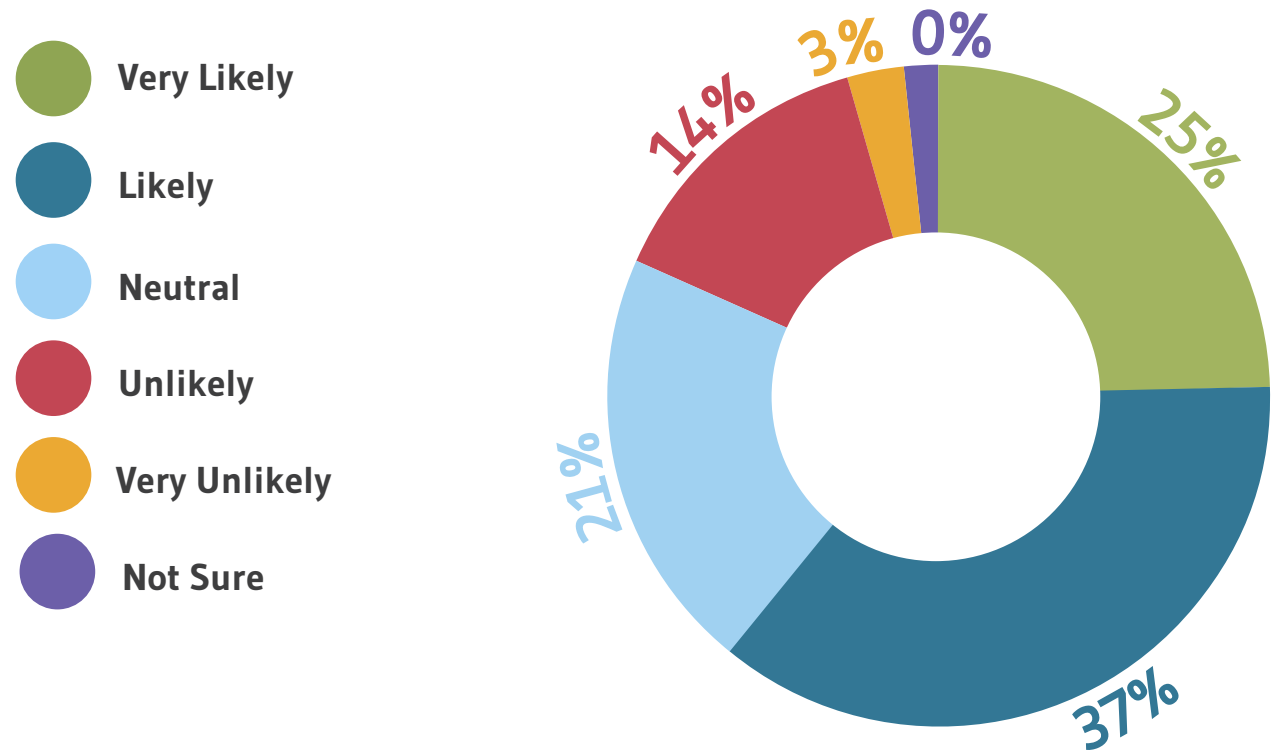
1) Respondents were asked how confident they feel answering basic visitor questions about Strathcona County (e.g. what there is to do for fun, where to stay, where to eat, etc.). 84% of respondents felt very or somewhat confident answering basic visitor questions.

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



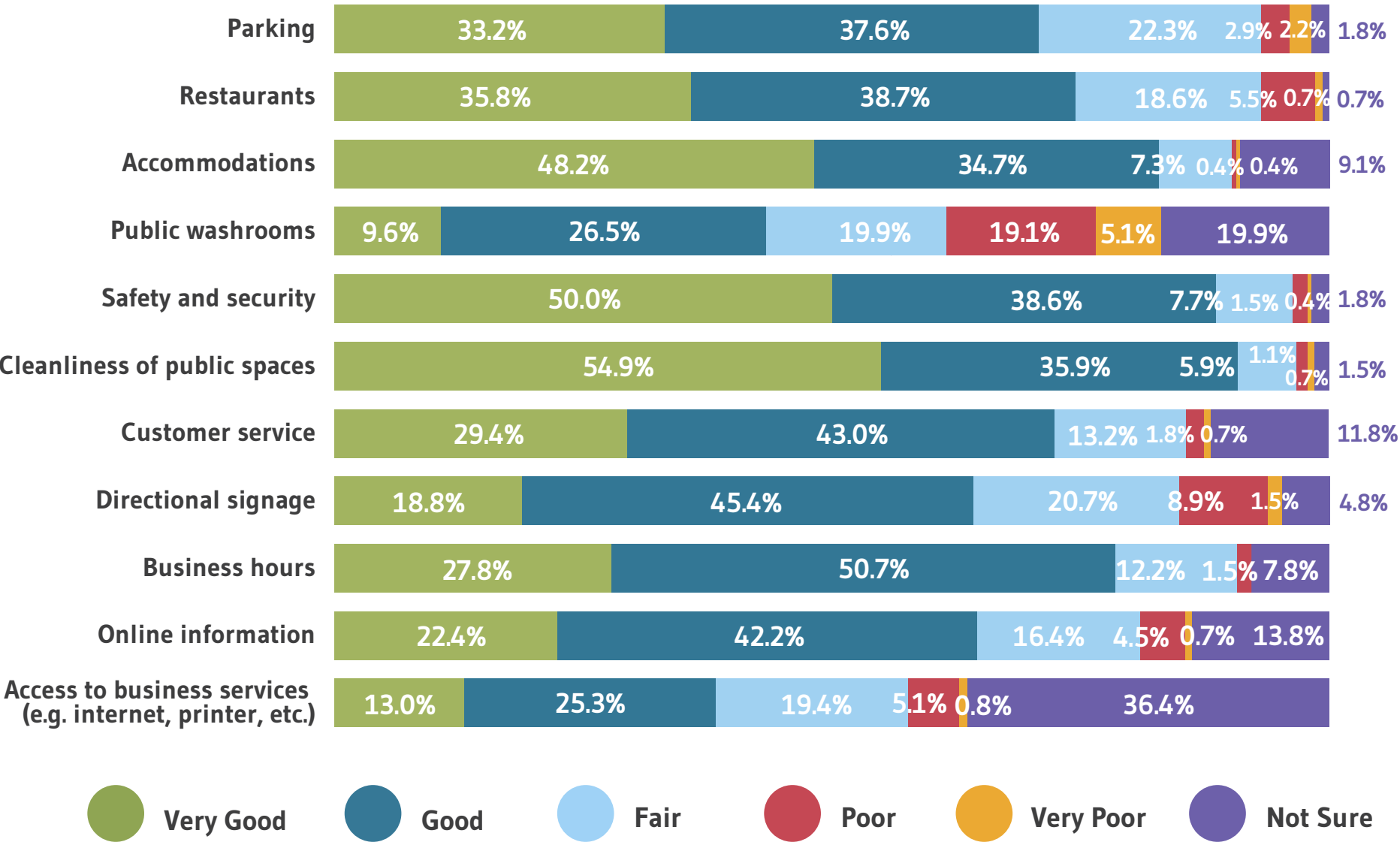
2) The majority of respondents were likely to recommend Strathcona County as a place for others to visit (62%). However, a significant percentage of respondents were neutral (21%) or unlikely (17%) to recommend the County as a place to visit.

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



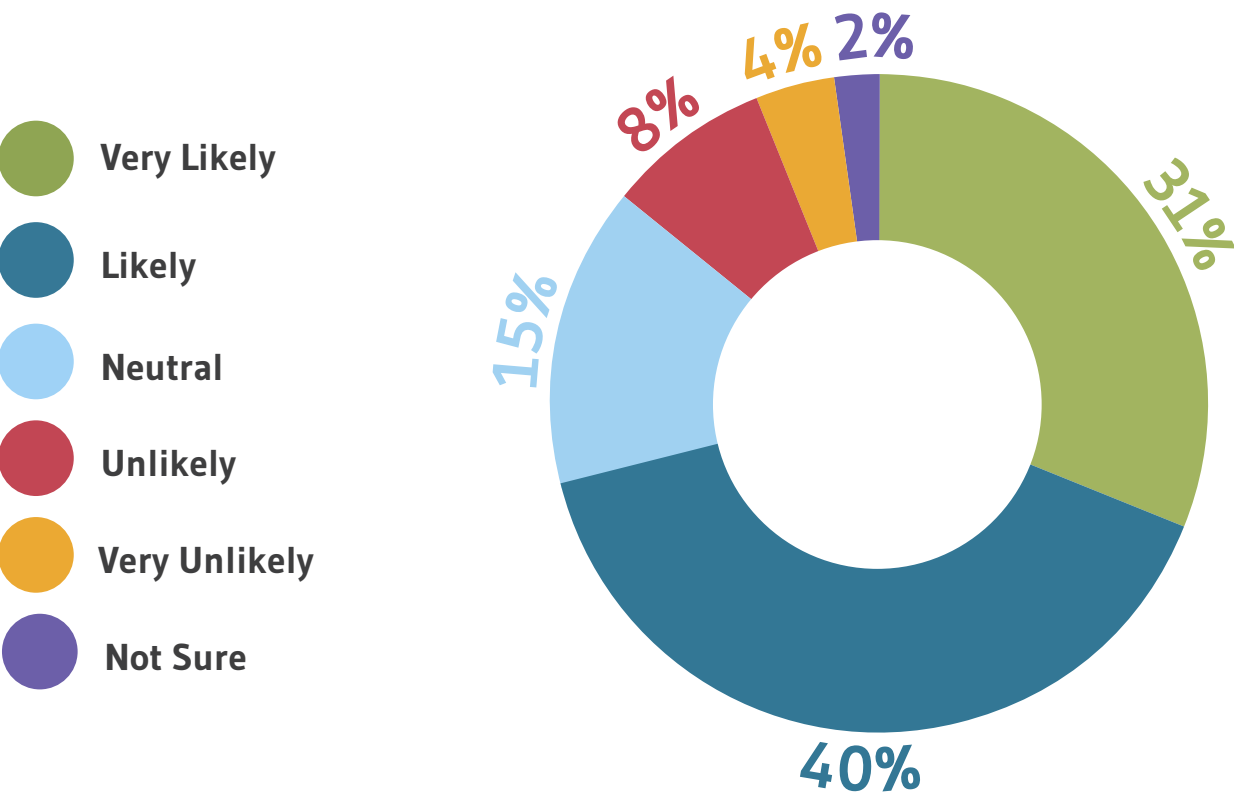
- 3) County residents were able to identify excellent tourism assets, including community recreation facilities, outdoor spaces and experiences, events and more. Commonly identified assets included Millennium Place, Strathcona Wilderness Centre, Beaver Hills Biosphere, Festival Place, large sporting events, and Elk Island National Park. All of the assets identified by residents will be reviewed during the development of a Tourism Asset Inventory for the County.
- 4) Visitor amenities rated highly by respondents included cleanliness of public spaces (55% very good and 36% good), safety and security (50% very good and 39% good) and accommodations (48% very good and 35% good). Visitor amenities rated poorly by respondents included public washrooms (19% poor and 5% very poor), directional signage (9% poor and 1% very poor), and restaurants (5% poor and 1% very poor).

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



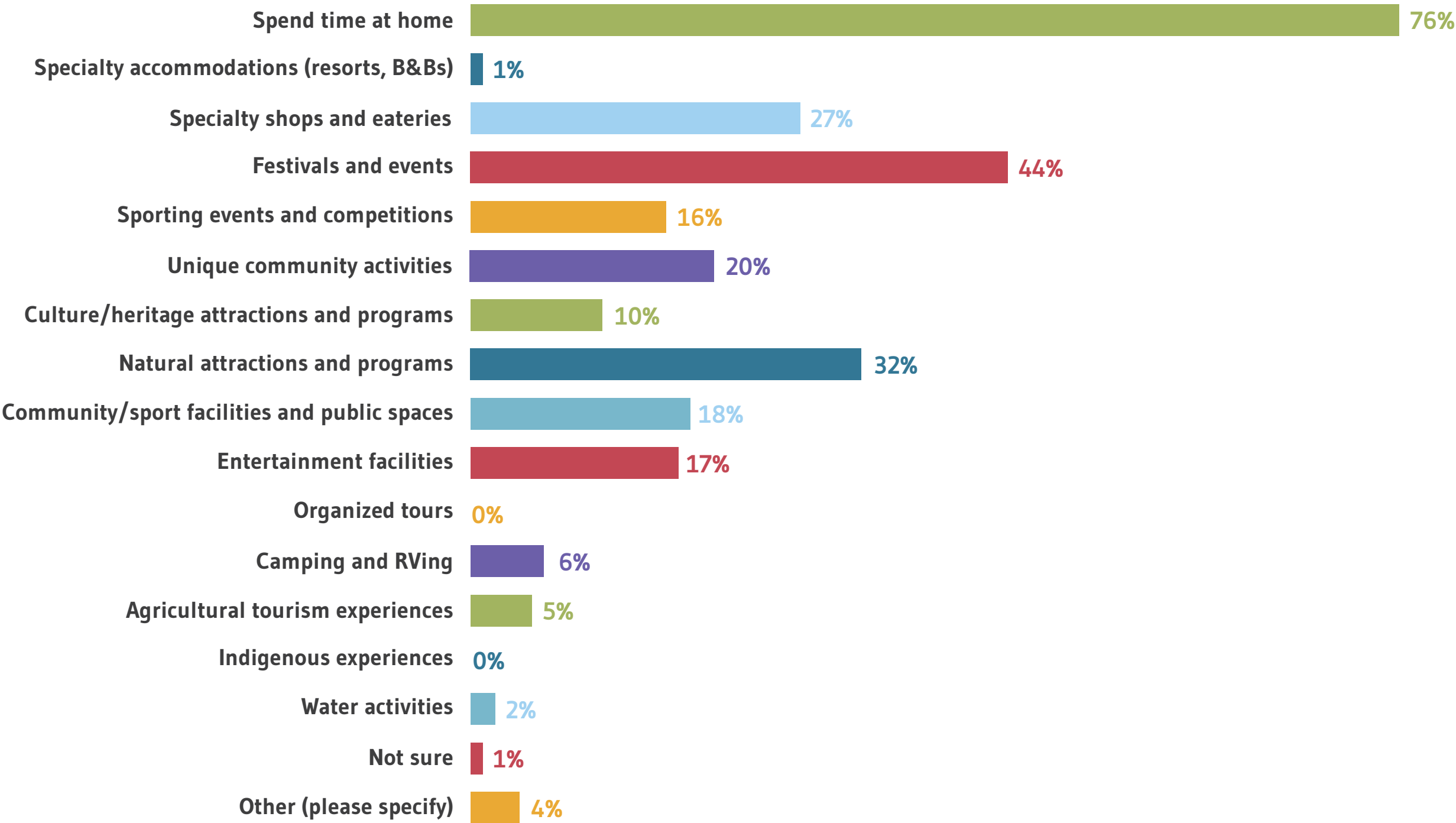
5) 71% of respondents were likely or very likely to invite their friends and family to visit Strathcona County within the next two years.

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



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

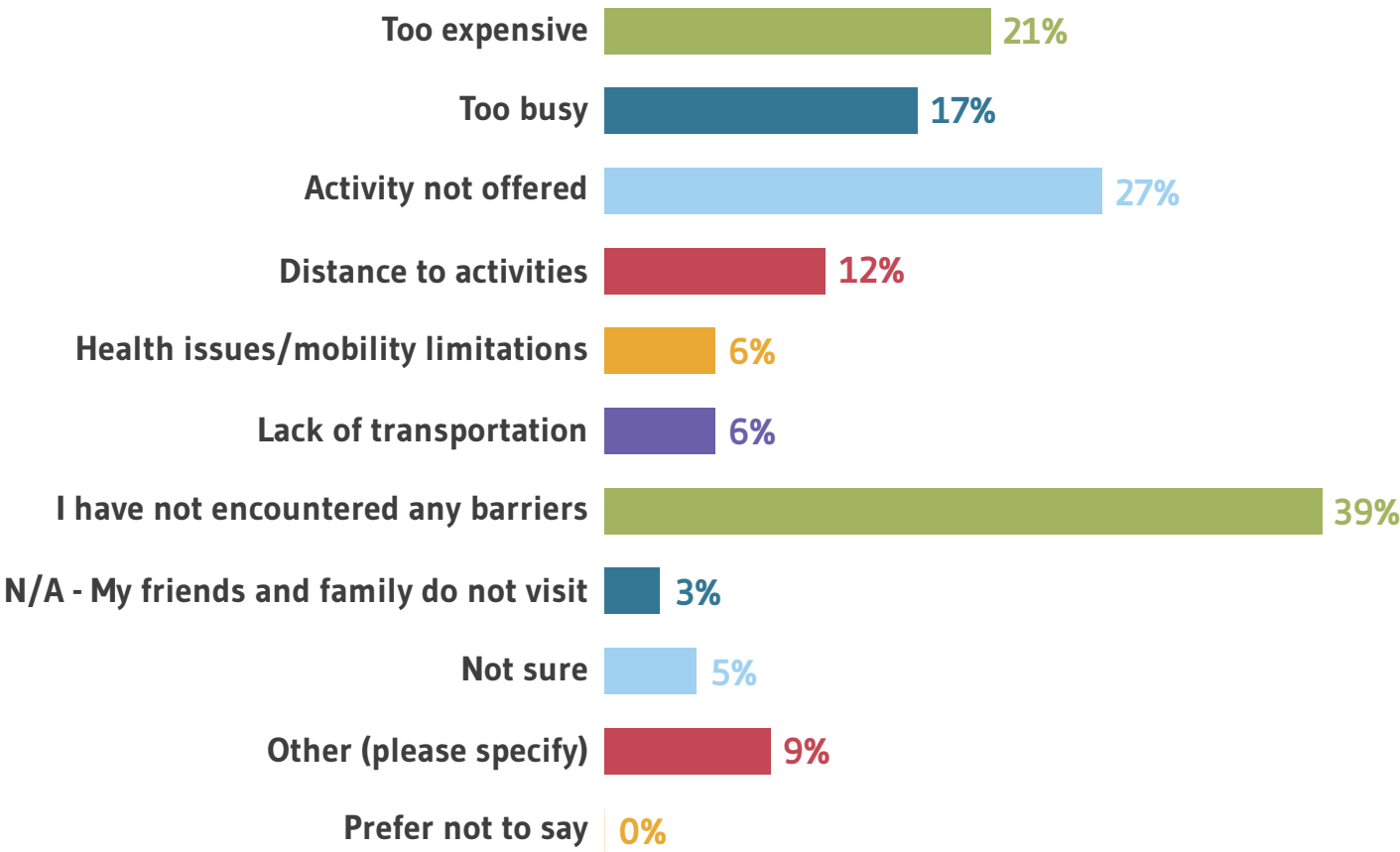
Question: What types of activities do you most like to do with friends and family when they visit?



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

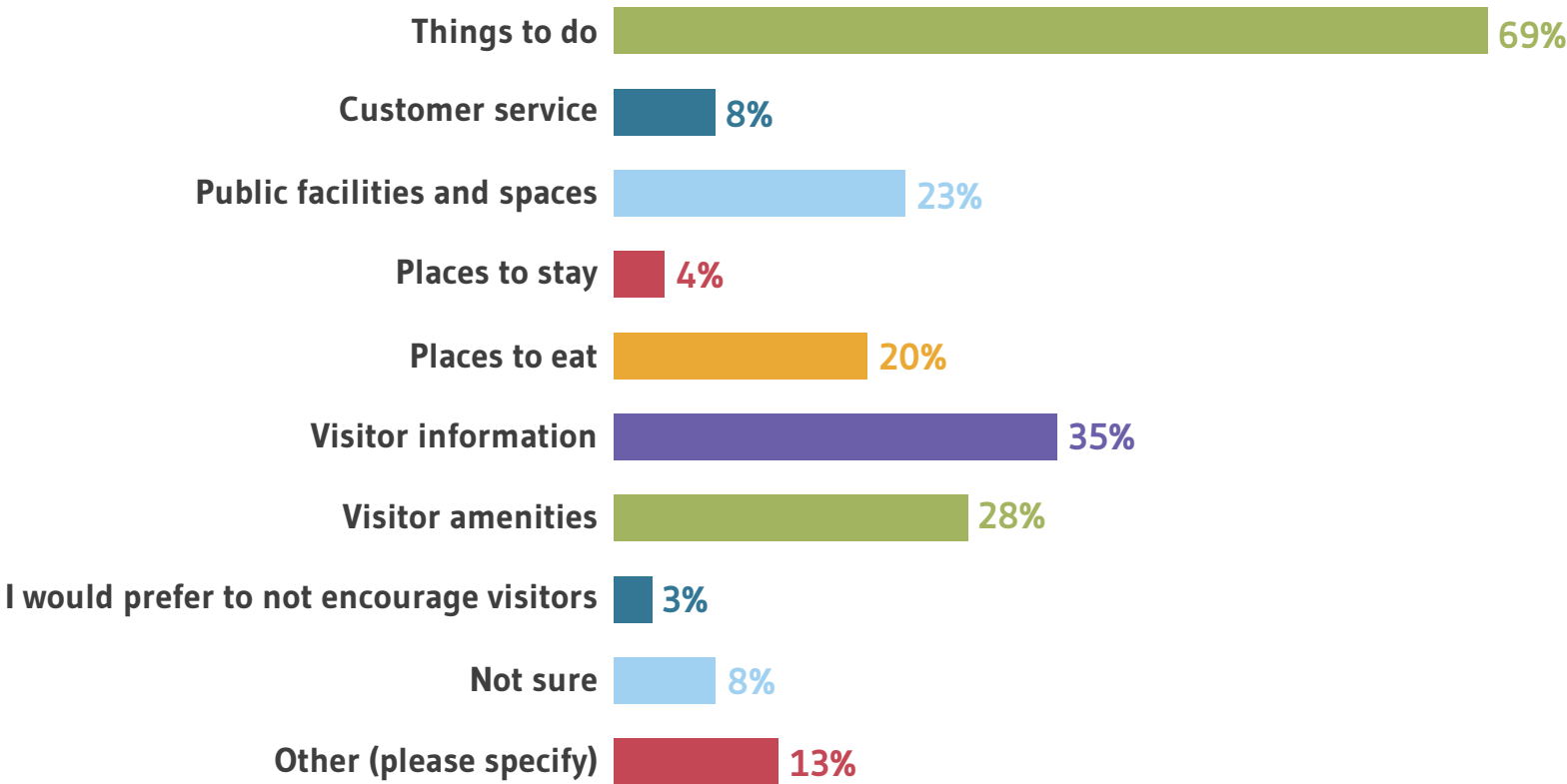
7) The biggest barriers to participation in activities with family and friends included activity not offered (27%), too expensive (21%) and too busy (17%). Notably, 39% of respondents said they have not encountered any barriers.*

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



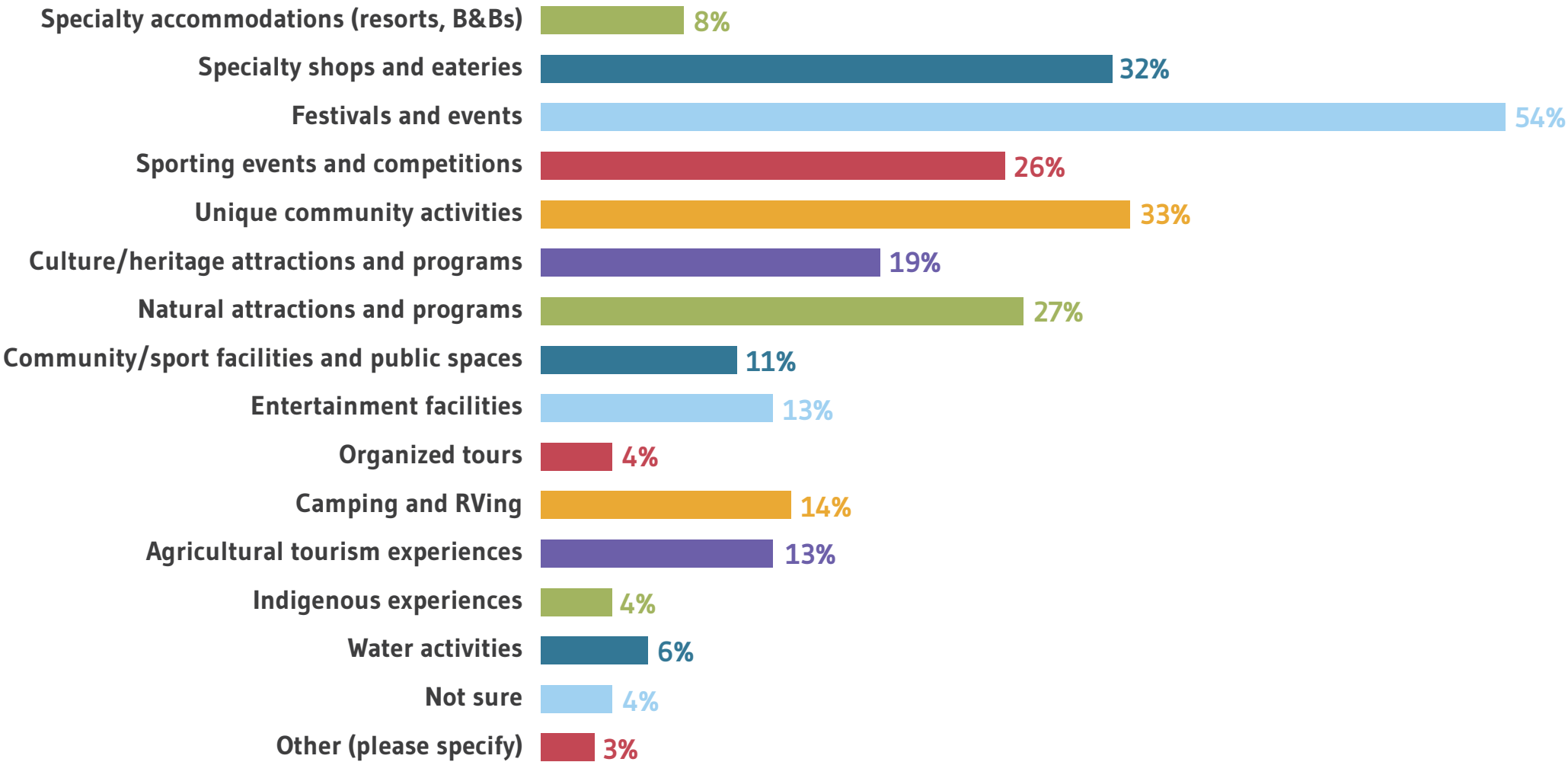
8) In order to encourage more visitation to the County, respondents said the community could most improve on things to do (69%), visitor information (35%) and visitor amenities (28%).*

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



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

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



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

TOURISM STAKEHOLDER SURVEY

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

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

FINDINGS FROM THE TOURISM STAKEHOLDER SURVEY

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

“Tourism increases revenues to local businesses.”

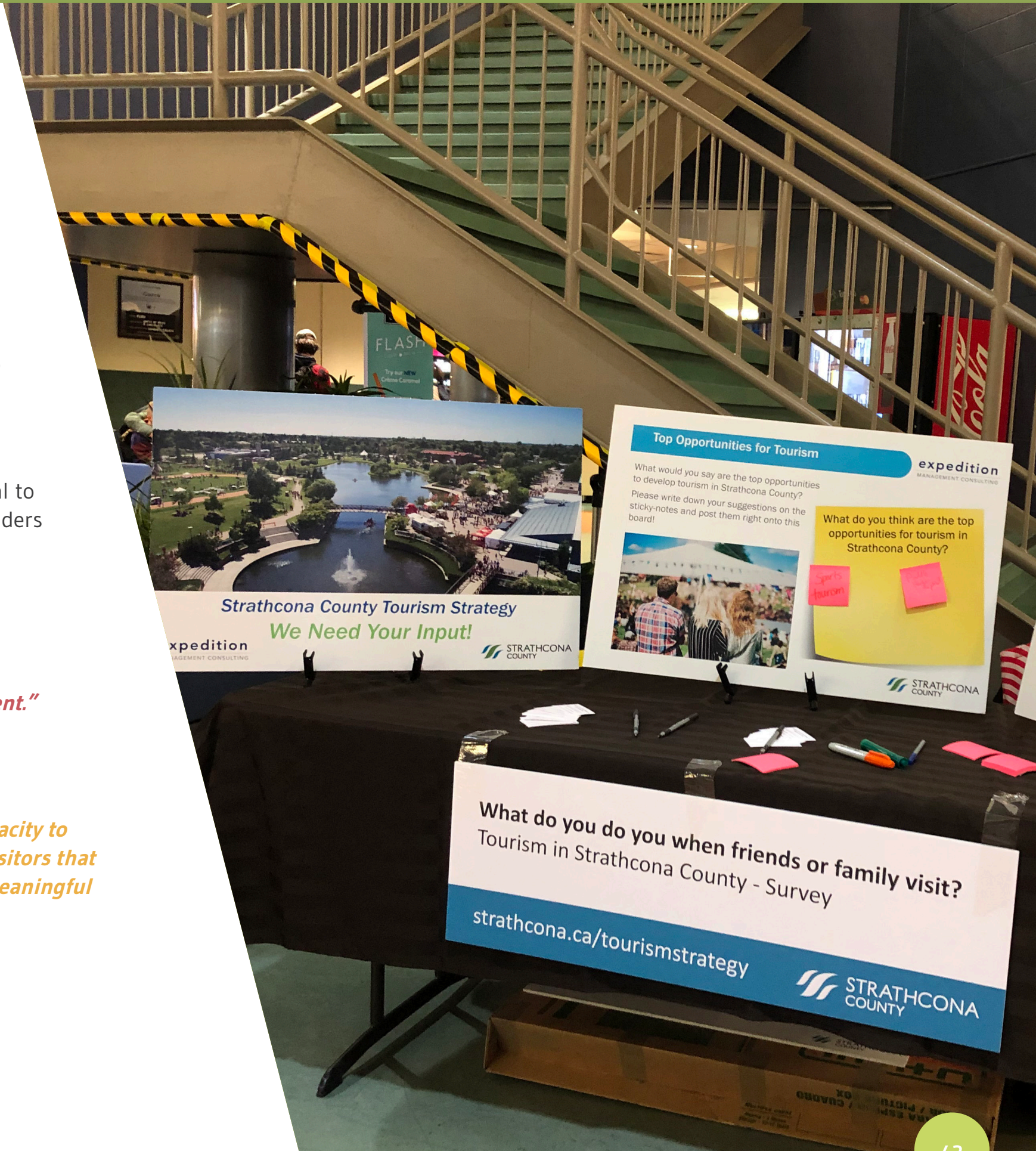
“Tourism is an industry that can potentially diversify economic growth in the region.”

“Tourism generates economic development.”

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

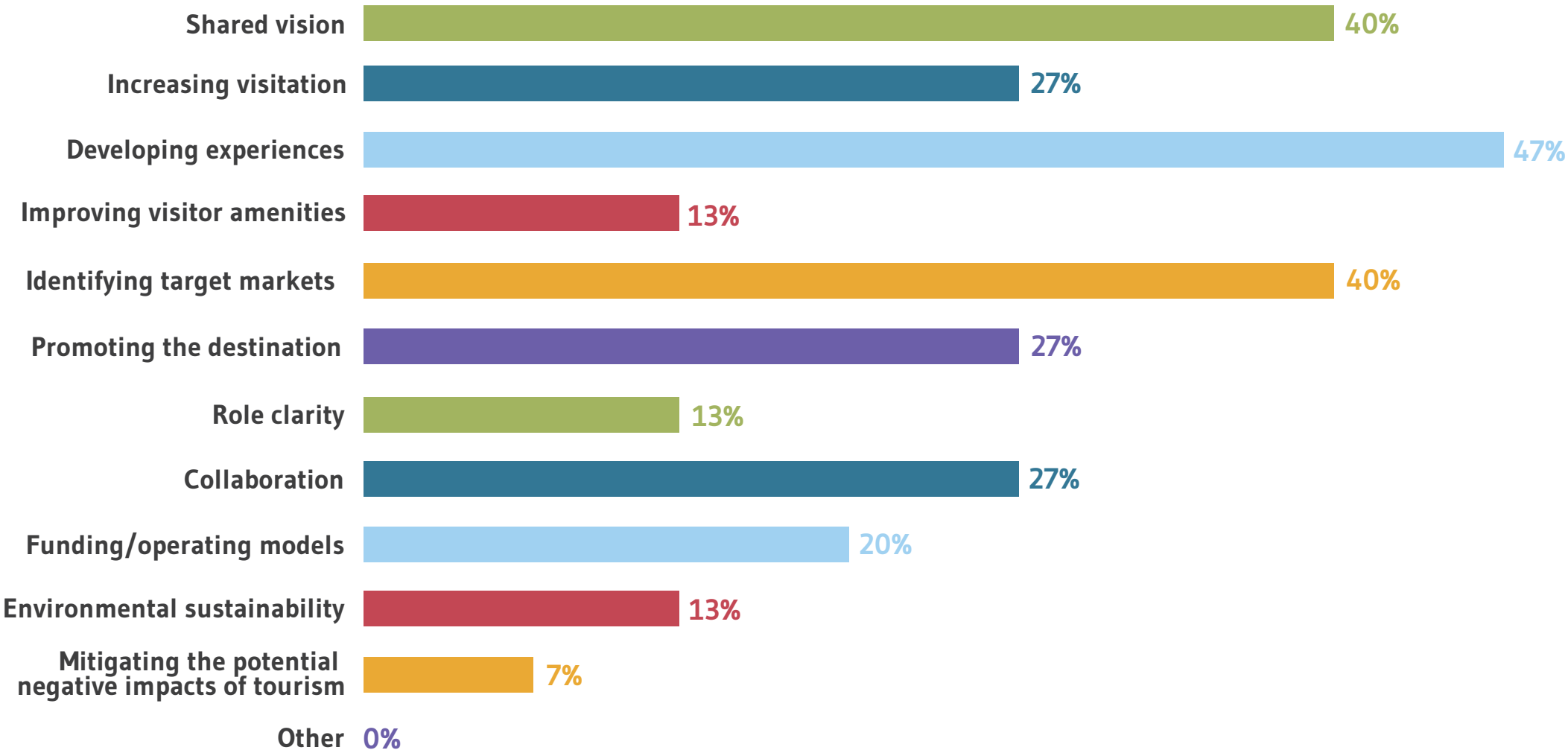
“Tourism supports the RV industry.”

“Tourists often purchase local art.”



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

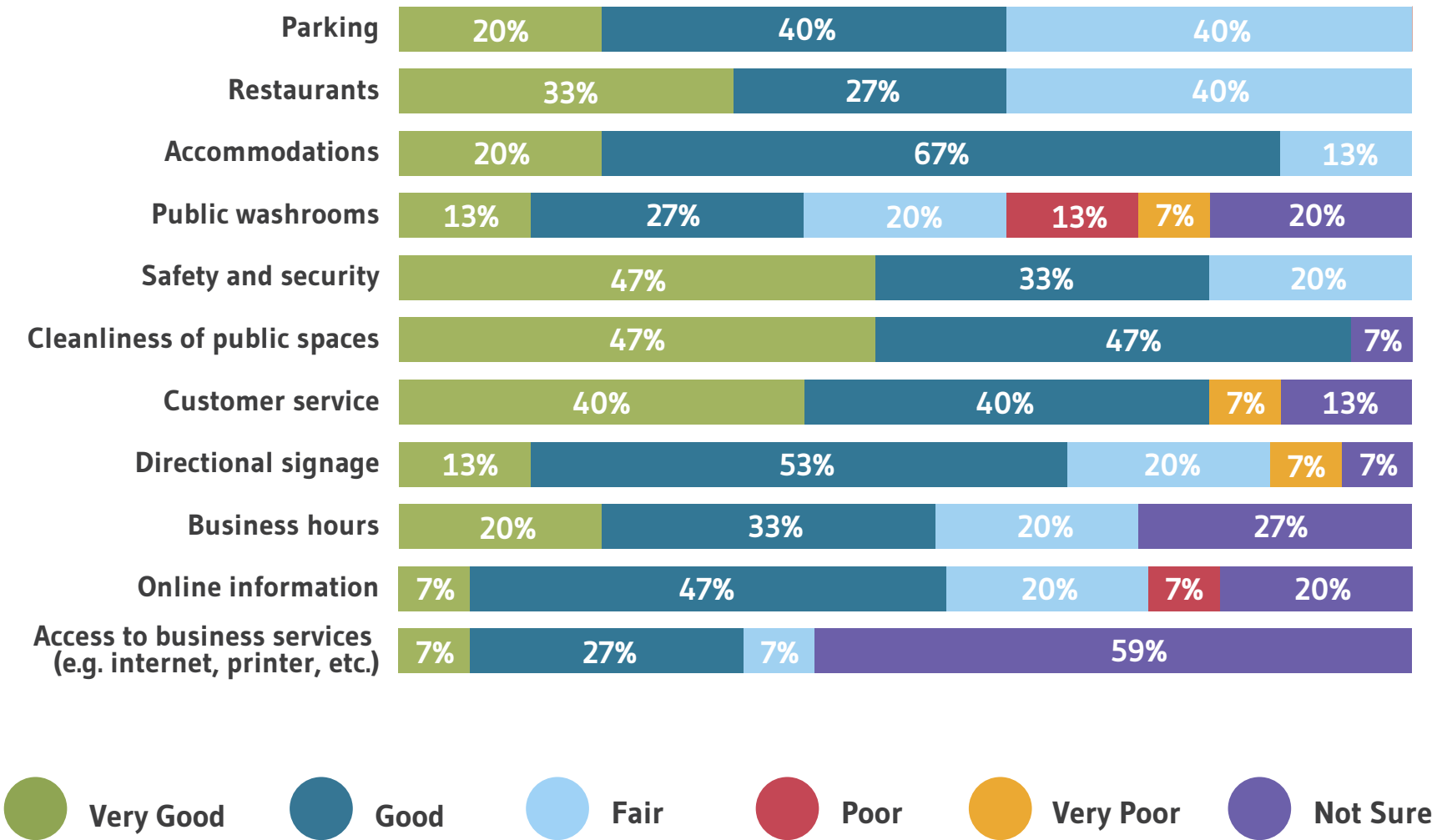
Question: As we begin developing the tourism strategy for Strathcona County, what do you think are the top three issues to focus on?



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

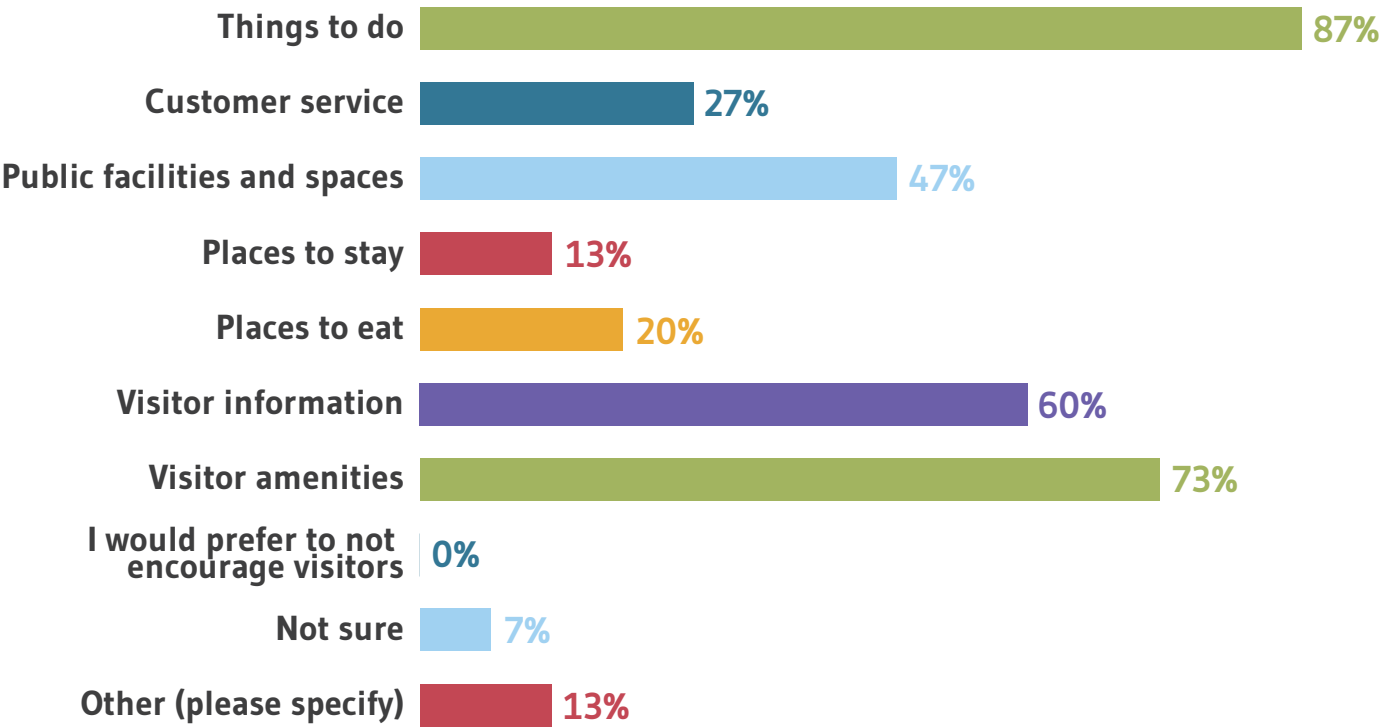
3) Visitor amenities rated highly by respondents included cleanliness of public spaces (47% very good and 47% good), safety and security (47% very good and 33% good) and customer service (40% very good and 40% good). Visitor amenities rated poorly by respondents included public washrooms (13% poor and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

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



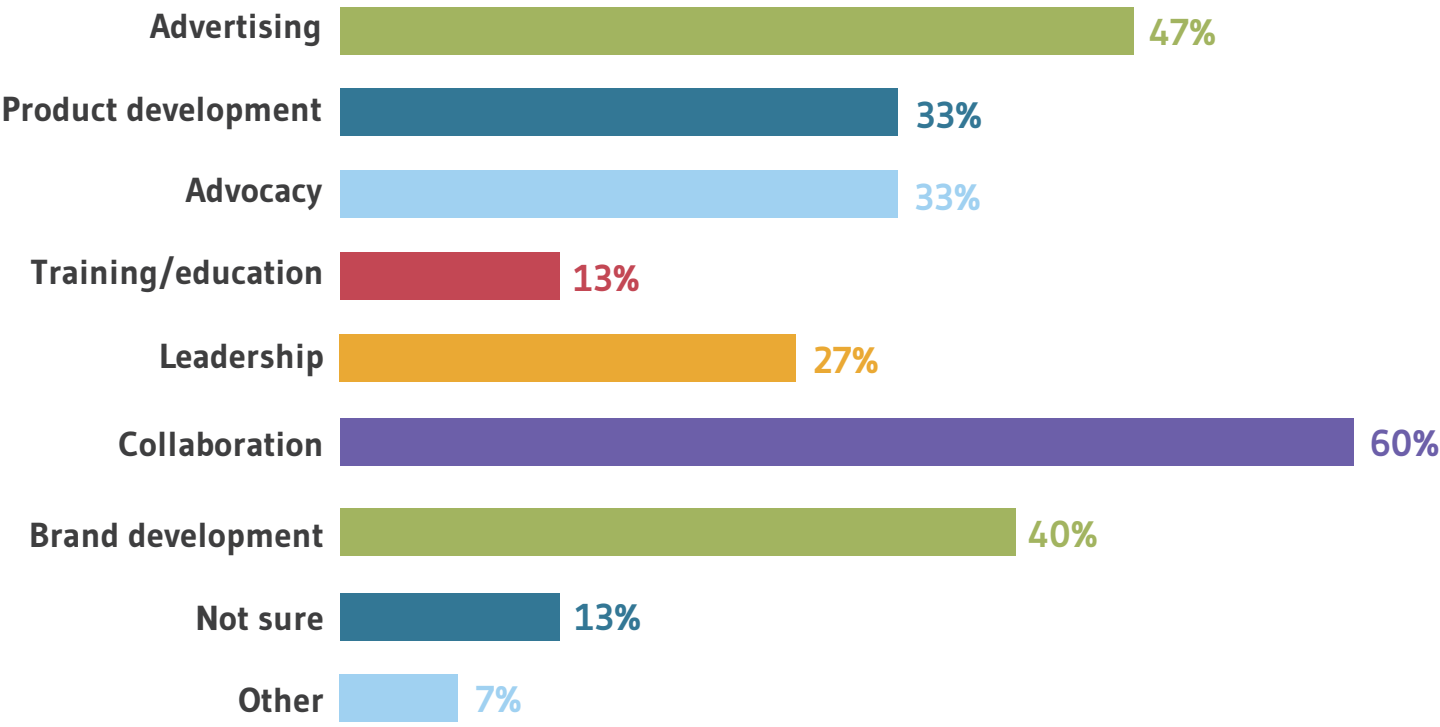
4) In order to encourage more visitation to the County, respondents said the community could most improve on things to do (87%), visitor amenities (73%) and visitor information (60%).*

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



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

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



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

STAKEHOLDER INPUT TOURISM CAFÉS

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

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

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



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

Source: Expedition Management Consulting Ltd.



OPPORTUNITIES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

History and Storytelling

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

Arts and Culture

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

Sports Tourism

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

Links to Community and Business Organizations

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

The Community

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

Unique Experiences

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

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

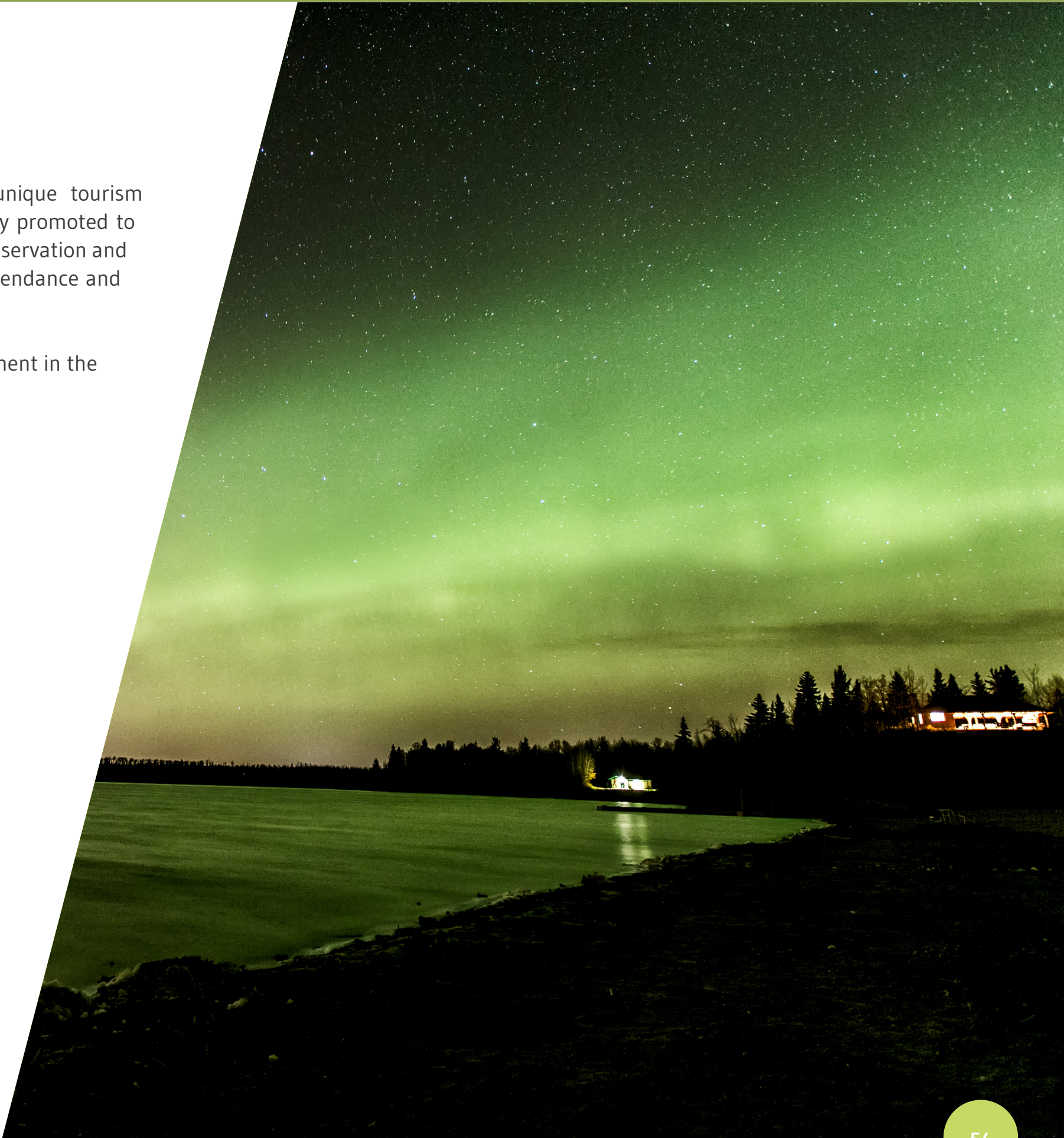
- Goat yoga
- Yurts
- Geocaching
- Scotford Hutterite Colony
- Agritourism

Additional Opportunities

A listing of other tourism development opportunities included:

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

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



CHALLENGES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Marketing and Promotions

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

Package Experiences

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

Communication and Capacity

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

Partnerships and Collaboration

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

Car Centric

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

Other challenges included:

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

VISION FOR TOURISM IN STRATHCONA COUNTY

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

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

PUBLIC ENGAGEMENT STATION

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

STAFF INPUT SESSIONS

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

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

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

OPPORTUNITIES	CHALLENGES
<ul style="list-style-type: none">• Building upon the County’s reputation as a top-quality host city that delivers outstanding mid-sized sport tourism events.• Offering more pre/post event activities to extend stays and increase spending.• The Recreation, Parks and Culture department has other offerings that can be further leveraged to attract visitors (e.g. outdoor experiences, cultural experiences).• Telling the story of Strathcona County (i.e. history and heritage of Indigenous and settler groups).• Build unique agritourism and culinary offerings.• Improving communication and information sharing between tourism stakeholders.• Improving the promotion of tourism-related offerings.• Leverage winter season product more to encourage visitation in the off-season.	<ul style="list-style-type: none">• Attracting and serving visitors is viewed as outside the mandate for many County departments.• Staff feel they are at or near capacity to deliver on events and activities in the County.• There is a need for improved role clarity.• There is a need to better understand appropriate levels of support for community-focused events vs. tourism-focused events.• Potential risks associated with overtourism (e.g. overcrowding).• Staff were uncertain whether tourism is a priority for the County.• There is a perceived lack of campground/ RV accommodations in the County.

TOURISM STAKEHOLDER INTERVIEWS

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

Municipal Government:

- Strathcona County Administration

Local Stakeholder Groups:

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

Local Businesses:

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

External Stakeholder Groups:

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

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



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

Source: Expedition Management Consulting Ltd.

OPPORTUNITIES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Sports Tourism

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

Natural Assets and Facilities

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

Agritourism Experiences

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

Historical Experiences

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

Arts and Cultural Experiences

- Theatre productions
- Cultural events
- Indigenous experiences

Partner with the City of Edmonton

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

Tourism Packages

- Create experiences and packages that are compelling and unique

Experience Clustering

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

School Groups

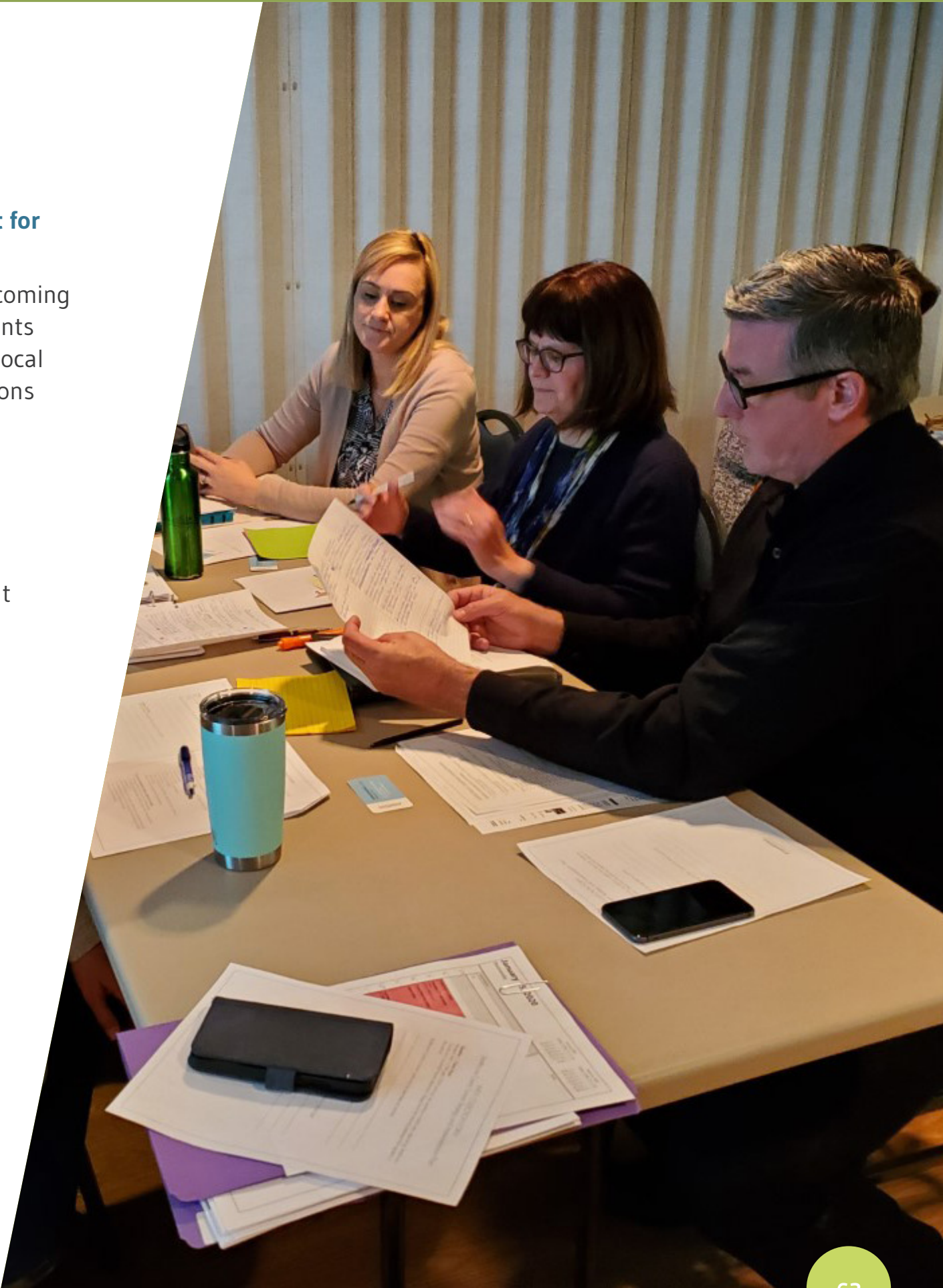
- Build partnerships and experiences for school groups

Build Community Support for Tourism

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

Organizing for Tourism

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



CHALLENGES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Limited Tourism Marketing and Promotion

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

Tourism Experiences and Packages

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

Facility Limitations

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

Limited Collaboration

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

VISION FOR TOURISM IN STRATHCONA COUNTY

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

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

DESTINATION DEVELOPMENT SERVICES

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

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

OPPORTUNITIES FOR PARTNERSHIP

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

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



STRATHCONA COUNTY COUNCIL INTERVIEWS

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

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

A summary of County Council interview input is provided next.

OPPORTUNITIES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

Natural Assets

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

Facilities

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

Tourism Packages

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

Festivals and Events

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

Strathcona County Location

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

Sports Tourism

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

Agriculture

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

Shopping and Retail

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

Marketing and Advertising

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

Other Opportunities:

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



CHALLENGES FOR TOURISM DEVELOPMENT IN STRATHCONA COUNTY

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

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

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

A number of other challenges were identified including:

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

VISION FOR TOURISM IN STRATHCONA COUNTY

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

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

WHAT ROLE SHOULD THE COUNTY PLAY IN DEVELOPING TOURISM?

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

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

Additional ideas about the County’s role included:

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



OPPORTUNITIES FOR PARTNERSHIP

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

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

3

NEXT STEPS



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

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

4

APPENDICES

APPENDIX A: SWOT AND STEEP ANALYSIS

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

SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none">• Safe, welcoming community.• Strategic location with proximity to large urban markets and Edmonton International Airport.• Strong highway access with linkages to Highway 16.• Strong supply of natural attractions and outdoor recreation opportunities.• Strong supply of fixed-roof accommodation providers.• High-quality community and sports facilities.• Proven experience delivering high-quality sport tourism events.• Strong interest from local businesses and other stakeholders to develop tourism.• Unique community history as a specialized municipality located next to Alberta’s Industrial Heartland.	<ul style="list-style-type: none">• Lack of market-ready tourism products.• Lack of market awareness of what the County has to offer to visitors.• Fragmented visitor information and tourism promotion system.• Lack of a defined tourism brand.• Underdeveloped tourism support system.• Lack of community awareness about the benefits of tourism.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Organizing key stakeholders for tourism development.• Developing key assets into market-ready tourism products for visitors (e.g. community/sport facilities, natural attractions, festivals and events, culture and heritage, agricultural operators, culinary offerings, Alberta’s Industrial Heartland).• Collaborating regionally with municipalities and individual attractions to drive visitation to the County.• Leveraging grant funding for destination development and tourism marketing.• Supporting the County’s core economic sectors through tourism.• Leveraging community and tourism assets to benefits residents and visitors alike.	<ul style="list-style-type: none">• Competition for limited investment and development resources.• Competition for visitors from other destinations.• Slow pace of economic recovery.• Environmental threats, including natural disasters, climate change impacts and pandemics.

STEEP ANALYSIS

Social

Strathcona County should consider both positive and negative social factors that can be generated through tourism development. For example, tourism can drive an influx of visitors who stay in the community periodically throughout the year. This can contribute to rising costs of living for residents. Other social impacts, such as vehicle congestion, crowding or loss of authenticity, can lead to conflicts with residents. Although, well-planned tourism development can conversely 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 in Strathcona County must watch these technological changes closely and adjust as needed to meet visitor expectations.

Economic

Globally, tourism has entered its tenth consecutive year of growth, and international tourism continues to outpace growth in the broader global economy.³ These findings confirm tourism as a leading and resilient economic sector on the global stage. At the national level, Canada has experienced its third consecutive record-breaking year in terms of tourism. In 2019, tourism generated an estimated \$104.9 billion in tourism expenditures, supported approximately 1 in 10 jobs in communities across Canada and contributed an estimated \$43.5 billion in Gross Domestic Product.⁴

At the provincial level, the economy is still recovering from a recession. There have been some promising economic indicators, although the economy is still weathering shocks from periodic drops in oil prices. The current economic situation has left many people searching for answers to maintain their quality of life. In previous downturns, there was a belief by many that there would be a swift bounce back and that the downturn was a good time to do planning before the next economic upswing. However, there is now a growing consensus that Alberta, and the global economy, are in a new reality of lower resource revenues. The effects of lower resource revenues are currently being felt in Strathcona County. For example, according to data from the Alberta Hotel and Lodging Association, the year to date hotel occupancy rate for Sherwood Park was only 38.4% in 2019.⁵

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

Environmental

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

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

Political

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

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

APPENDIX B: REFERENCES

¹ Retrieved from <https://industry.travelalberta.com/visitor-market-insight/visitor-insights/visitor-economy>

² Retrieved from: <https://www.go2hr.ca/getting-know-bcs-tourism-industry/what-is-tourism>

³ Retrieved from: <https://www.unwto.org/international-tourism-growth-continues-to-outpace-the-economy>

⁴ Retrieved from: https://www.destinationcanada.com/en/news/canada-experiences-third-consecutive-record-breaking-year-tourism-2019?utm_source=TourismHRInsider&utm_campaign=March_4_2020&cmp=1&utm_medium=HTMLEmail

⁵ Alberta Hotel and Lodging Association. (2020). Edmonton Regional Meeting.