

TOURISM DEVELOPMENT ZONE

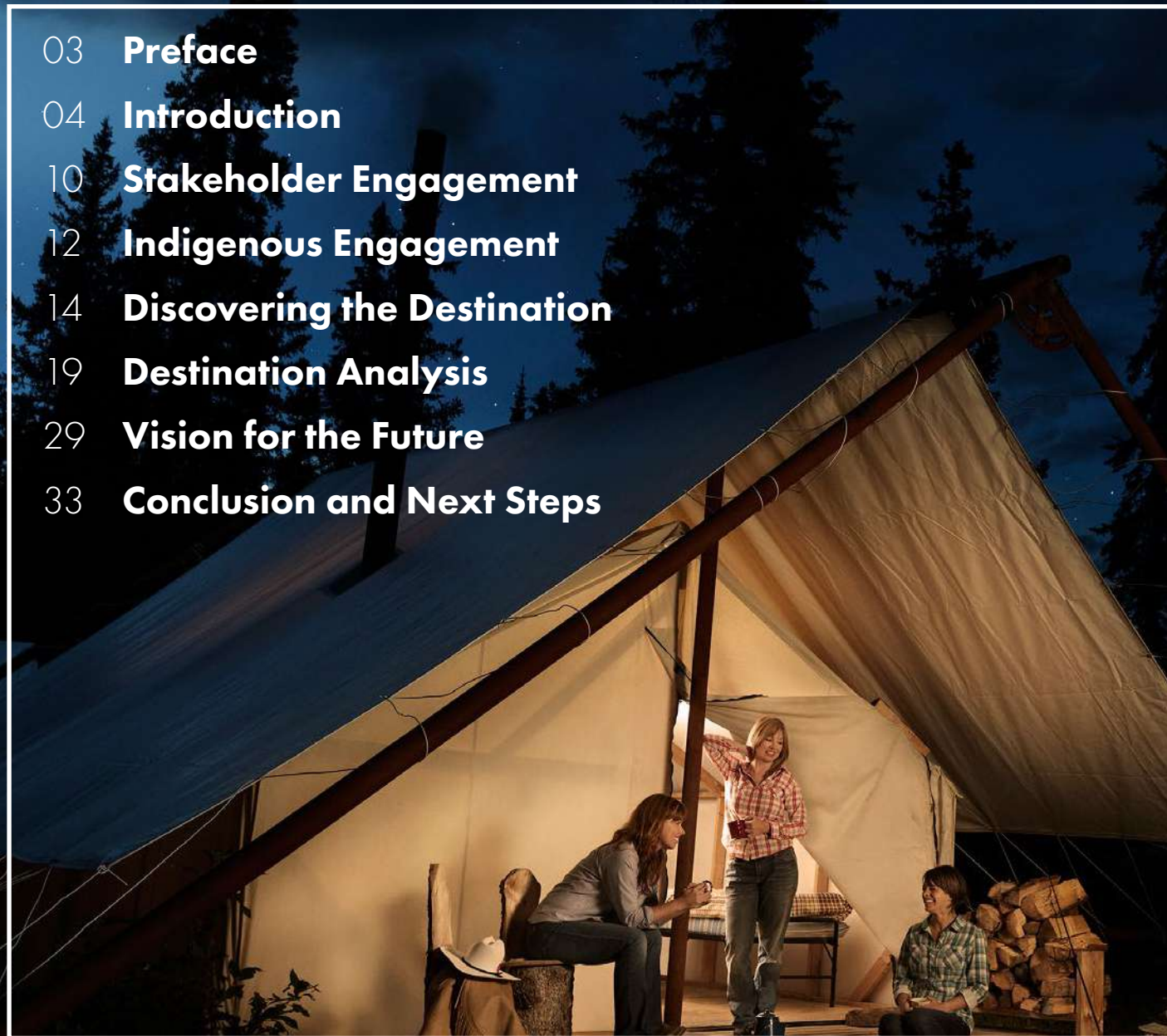
Cochrane/Sundre/ Rocky Mountain House



DISCOVERY
REPORT
2023

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Front cover:
Kelsey's Caravan, Bow River, Cochrane

Panther River Adventures, Sundre

PREFACE

The Cochrane/Sundre/Rocky Mountain House Tourism Development Zone (TDZ) stretches west across wooded foothills and rushing rivers to breathtaking landscapes and clear mountain views. The people who call this area home, and the visitors that are drawn here, prefer to be known as non-conformists; rural folks formed by a majestic and rugged place.

To achieve its full potential, the Cochrane/Sundre/Rocky Mountain House TDZ requires an approach that departs from the zone's current status quo. In order to offer a seamless visitor experience, communities and other stakeholders will need to work together to manifest a cohesive tourism strategy.

This Destination Development Discovery Report for the Cochrane/Sundre/Rocky Mountain House TDZ:

- Highlights those tourism assets most likely to attract high-value visitors from across Canada and around the world
- Provides insight into the zone's natural, cultural, and economic environments
- Identifies specific challenges facing this TDZ and proposes initiatives to address them
- Builds a strong business case for investing in the Cochrane/Sundre/Rocky Mountain House TDZ in order to capitalize on existing assets and catalyze future growth and prosperity
- Demonstrates that in order to fulfill their tourism potential, most communities within this zone should develop collective brand identities based on their position within potential tourist destinations and collaborate at an unprecedented level

It is important to note that this Discovery Report is a living document and will continue to evolve to reflect ongoing work, including Indigenous engagement that is currently underway.

This Discovery Report informs and identifies specific actions Travel Alberta, the Government of Alberta and communities within the Cochrane/Sundre/Rocky Mountain House TDZ should take to support the design of a comprehensive Destination Development Plan. This report aligns the tourism development ambitions of local stakeholders with the province's goal to double tourism revenue by 2035.



Fallentimber Meadery, Water Valley

03 INTRODUCTION



Yamnuska Wolfdog Sanctuary, Cochrane

LAND ACKNOWLEDGMENT

In the spirit of respect, reciprocity and truth, we honour and acknowledge the traditional territories of the many First Nations, Métis, and Inuit in Alberta. We value these sacred gathering places and aim to inspire others to appreciate and embrace stewardship of the land as they explore our great province.

The Cochrane/Sundre/Rocky Mountain House TDZ lies at the intersection of a number of historical and present-day lands that Indigenous Peoples have cared for and lived on for generations. We honour the traditional lands of the Treaty 6 and 7 signatories, including the Blackfoot Confederacy, Nakota Sioux, Tsuut'ina, Stoney Nakoda, Cree, Dene, and Saulteaux homelands. We also acknowledge members of the Red Deer Métis District and Rocky View Métis District within the homeland of Métis and the Otipemisiwak Métis Government, as well as Indigenous Peoples living in urban areas throughout the Cochrane/Sundre/Rocky Mountain House TDZ. We appreciate that modern borders do not align with traditional land use, and we honour the neighbouring Indigenous communities who have travelled and inhabited this land throughout history.



Treaty 7

APPRECIATION

Travel Alberta would like to thank all those who participated in the creation of this Discovery Report.

Please note, Indigenous engagement is currently underway.

- **Brenda Holder**, owner, Mahikan Trails
- **Callandra Caufield**, operations manager, Alberta Food Tours
- **Christofer Atchison**, director of Legislative, Community and Agricultural Services, Mountain View County
- **David Kalinchuk**, economic development officer, Rocky View County
- **Jeff Hartling**, economic development officer, Rocky Mountain House
- **Jerry Pratt**, economic development officer, Clearwater County
- **Jo-Anne Oucharek**, Executive Director, Cochrane Tourism
- **Jon Allan**, economic development officer, Town of Sundre
- **Linda Nelson**, chief administration officer, Town of Sundre
- **Lisa Grosvold**, Reeve, Municipal District of Bighorn
- **Mike Korman**, director of Planning and Economic Development, Town of Cochrane

COMMITMENT TO SUSTAINABILITY & REGENERATIVE TOURISM

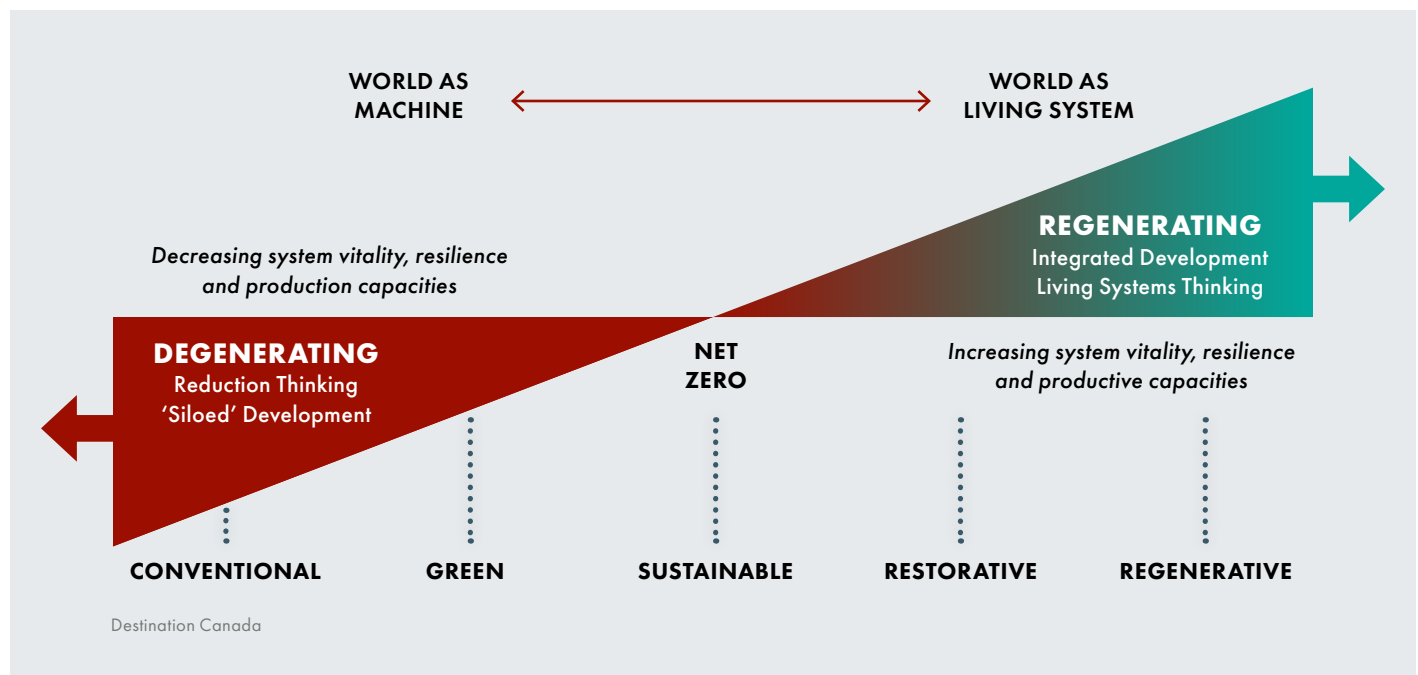
Tourism is a key economic sector in Alberta with strong potential to diversify the economy, create jobs, grow Indigenous tourism businesses, bring the “taste of place” to our guests’ tables and build vibrant communities. It also allows us to preserve and share culture and history, maintain or enhance the environment and foster innovation.

However, as outlined in Destination Canada’s report titled, “A Regenerative Approach to Tourism In Canada,” more and more communities are rejecting uncontrolled tourism development. The rising sentiment is that current approaches:

- Are too often extractive and degenerative
- Reduce quality of life for residents
- Damage ecosystem health
- Diminish local culture and community in the interest of efficiency and scale

An alternative approach is gradually emerging — and in many ways re-emerging. It recognizes the world not as a machine but as a living ecosystem, with humans playing an integral part. And it is from this worldview that the concept of regeneration arises.

Spectrum of Worldviews & Strategies



TOURISM DEVELOPMENT ZONES

Collaborating with Communities

Pre-pandemic, nearly 60 per cent of visitation and 75 per cent of tourism expenditures occurred in the mature tourism destinations of Banff, Lake Louise, Canmore, Jasper, Calgary and Edmonton. By developing additional “emerging” destinations, we expand opportunities for Albertans to explore their own backyard, creating more space for international visitation in legacy destinations while reducing Alberta’s traveller deficit.

To support tourism development in these emerging destinations, Travel Alberta identified 10 Tourism Development Zones (TDZs) across the province with a high potential for tourism growth over the next 10 years. With successful and sustainable development, these destinations will have the ability to make a meaningful contribution to Alberta’s visitor economy.

In partnership with communities and stakeholders, Travel Alberta has co-developed a series of TDZ Discovery Reports. These Discovery Reports will inform and guide our future Destination Development Plans that include medium- and long-term strategies to contribute to the growth of Alberta’s visitor economy across many high-potential regions of the province.

Together with industry, Indigenous Peoples, government and residents across each TDZ, we strive to:

- Grow & diversify the economy
- Support jobs
- Preserve cultures
- Foster innovation
- Conserve the environment
- Improve resident quality of life



DESTINATION DEVELOPMENT PLAN

A Destination Development Plan (DDP) is a 10-year strategic roadmap to optimize and future-proof the potential of a zone's visitor economy. The realized benefits of a comprehensive DDP include: increased revenues coming into communities from visitors; support for the growth of small-to-medium size businesses; the alignment of public, private and community sectors; more opportunities for employment; and enhanced pride of place and quality of life for Albertans.

In this first phase, we took a data-driven and community-led approach to better understand the state of the local visitor economy in each TDZ and begin to identify the inter-related elements of a comprehensive DDP. We assessed resident sentiment and the commitment of stakeholders and municipal governments to determine whether or not local leadership was present and committed to diversifying their zone's economy through tourism. In many TDZs, it was evident that multiple initiatives (and even past studies) have evaluated the tourism potential across counties and communities. We speculate

that these previous assessments have not resulted in optimized local tourism sectors because — as reflected in the DDP framework — comprehensive optimization requires attention, consideration and investment of resources across more elements than most organizations have the capacity or resources to coordinate.

As this report demonstrates, we have identified both opportunities and barriers across many of these elements. Going forward, there is much work to be shared amongst stakeholders in each TDZ, using the DDP as a framework. Travel Alberta is committed to collaborating with local and provincial partners to help drive the development and execution of a DDP in those communities that are equally committed to building up Alberta's visitor economy.

Now that this Discovery Report has been released, it is key that Travel Alberta, the Government of Alberta and the many stakeholders within the Cochrane/Sundre/Rocky Mountain House TDZ work together to address the relevant inter-related elements:



(Adapted from Fáilte Ireland)

METHODOLOGY

Travel Alberta partnered with the consulting firm InterVistas, Gaining Edge Consulting, Vardo Creatives and GDAN Solutions to collect the data and reach the conclusions summarized in this report.

A two-part methodology allowed Travel Alberta and the consulting team to become acquainted with regional stakeholders and communities, determine their vision for the future growth of the local visitor economy and identify key action steps to support a path forward in the design of a DDP for the Cochrane/Sundre/Rocky Mountain House TDZ.

In the **“discovery and destination profiling”** phase, Travel Alberta worked with the consulting team to host an online project kick-off presentation with TDZ internal stakeholders; invited operators, government representatives and the local destination management organization (DMO) to participate in this TDZ’s steering committee and develop a DDP for the Cochrane/Sundre/Rocky Mountain House zone; established terms of engagement; and accessed primary and secondary research, as well as material provided by regional organizations.

In the **“exploring, imagining and visioning”** phase, the consulting team met with the steering committee and other stakeholders in a series of focus group sessions to determine opportunities, challenges and goals; facilitated planning sessions; hosted three visioning workshops that resulted in an overarching stakeholder vision, five collective goals and 43 associated initiatives for the TDZ; and conducted in-depth community assessments within the Cochrane/Sundre/Rocky Mountain House TDZ. These assessments included visits to three key communities (Cochrane, Sundre, and Rocky Mountain House), visits to proposed investment sites, meetings with over 25 industry partners and members of local government, interviews with business operators and community members, and interviews with over 37 stakeholders.

Rockyview Hotel, Cochrane



04 STAKEHOLDER ENGAGEMENT



Mahikan Trails Guided Tours, Sundre

280

Stakeholders

64

Businesses

3

Communities

WHAT WE HEARD

In order to gain a comprehensive understanding of the Cochrane/Sundre/Rocky Mountain House TDZ, Travel Alberta and the consulting team made a concerted effort to engage with the area's communities. As a result of this engagement, the team learned that:

- The management of public lands and conflicting land uses in some parts of this zone make it challenging to develop nature-based tourism products and experiences. Many stakeholders identified concerns that land use issues have led to potentially dangerous experiences for visitors and have had a negative impact on the environment.
- Currently, most visitors to the zone are from Alberta, and residents do not identify international visitation as an opportunity.
- There is a strong sense of pride in western heritage and community amongst residents.
- Each community has a lot of pride in their unique identities.
- Communities within the zone have inconsistent, unaligned approaches and priorities with regard to tourism.
- This zone includes one of Alberta's fastest-growing communities, Cochrane, which offers significant opportunities for employers seeking labour and a strong consumer base that includes visiting friends and relatives.
- There is a lack of fixed-roof accommodations, including hotels that target leisure visitors, campgrounds, and unique accommodations, such as comfort camping and glamping.
- Highway conditions change from asphalt to gravel as visitors head west of Highway 22. These changing conditions are an impediment to accessing backcountry locations — primarily for out-of-province visitors and tour groups, whose vehicles are not equipped to travel on these roads.
- There is a lack of tourism products and experiences, specifically nature-based and western heritage experiences.
- The river system plays an important role in tourism in this TDZ and could be further enhanced to better suit the needs of residents and visitors alike.
- Shortages of skilled, available labour during peak season impede tourism growth.
- Stakeholders want to ensure that visitors respect the environment and contribute to the local economy, which is what industry would refer to as regenerative tourism.
- Rocky Mountain House has stronger alignment with the David Thompson TDZ than with the communities and surrounding areas of Cochrane and Sundre.

Comprehensive Indigenous community engagement is currently underway and will provide further insights and observations.

05 INDIGENOUS ENGAGEMENT



Warrior Women, Jasper National Park

Across generations, Indigenous Peoples have warmly embraced their neighbors on ancestral lands, fostering deep, mutually enriching bonds through the customs and protocols of treaty-making and visitation. This enduring approach is steeped in the ancient traditions of hospitality and attentive listening.

In active relationship with Indigenous Tourism Alberta, Travel Alberta has enlisted our teams to engage and share space with First Nations, Councils, Settlements, Coops, Confederacies, and community leaders and community members to nurture mutual understanding, trust, and respect. Our engagement protocols and approaches are deeply anchored in the wisdom of our ancestors and knowledge shared by and from the communities we work with and for. Throughout our outreach efforts, we have and will continue to invite in and convene Indigenous leaders and community members with *kisêwâtisiwin* — kindness.

We look forward to weaving the insight we gain into this Discovery Report upon completion.

We hold the belief that Travel Alberta is dedicated to continuous engagement, active listening, and taking effective measures to nurture and grow these relationships, fully comprehend shared aspirations, and further strengthen trust. Together with Travel Alberta and Indigenous Tourism Alberta, we acknowledge and extend our gratitude to the Elders, Knowledge Carriers, Youth, and leadership of these communities and to all our participants and relatives in this transformative work.

kahkiyaw niwâhkômâkanitik — All my relations.

Ali Tapaquon
principle and founder
Tatâga Inc.

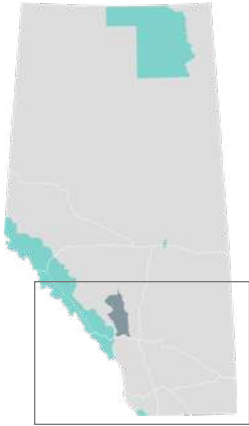
Suzanne Denbak
principle and founder
Cadence Strategies

05 DISCOVERING THE DESTINATION



GlenEagles, Cochrane

COCHRANE/ SUNDRE/ROCKY MOUNTAIN HOUSE



The Cochrane/ Sundre/Rocky Mountain House TDZ stretches from Cochrane to Rocky Mountain House, where Highway 22 (the Cowboy Trail) turns into Highway 11 (David Thompson Highway). The zone encompasses all lands east of the Rocky Mountains to the Cowboy Trail and lies in portions of the Rockyview, Mountainview, Clearwater and Bighorn municipal districts. It includes the towns of Cochrane, Sundre and Rocky Mountain House, as well as several villages and hamlets (Bottrel, Water Valley, Cremona, Elkton, James River Bridge and Caroline).

Three major river systems traverse the zone: the North Saskatchewan River, the Red Deer River and the Bow River. Key attractions include Rocky Mountain National Historic Site and numerous provincial recreation areas.

The Cochrane/Sundre/Rocky Mountain House Discovery Report identifies a shared vision for the zone, goals to stimulate a healthy visitor economy and maximize the inherent opportunities of such an economy.

Soft adventure

This zone is a paradise for outdoor enthusiasts and nature lovers alike, offering river sports, river tours, many forms of biking, snowshoeing, snowmobiling, horseback riding, and camping.

River tourism

River tourism includes river-side nature walks, swimming, fishing, rafting, canoeing, kayaking and paddle boarding. Visitors can participate in these activities at all levels — from the novice to the professional — thanks to the zone's three unique river systems.

The North Saskatchewan, Red Deer and Bow rivers represent significant untapped sources of tourism revenue in this TDZ.

Historical discovery

Deeply rooted in cowboy heritage and the spirit of the west, communities within the zone celebrate the traditions of the Canadian cowboy. Visitors can share in these traditions through such experiences as visiting ranches, attending rodeos, seeing herds of wild horses and riding domesticated horses.

Scenic vistas

Visitors to the zone can travel along a multitude of routes that feature gorgeous prairie expanses, jagged peaks and abundant wilderness and wildlife.



DEMOGRAPHICS AND POPULATION

This area, comprised of the towns of Cochrane, Sundre and Rocky Mountain House, and parts of the municipal districts of Bighorn, Rocky View, Mountain View and Clearwater, has an estimated population of just over 45,478 people.

Population growth over the last 10 years has been concentrated mostly in Cochrane, one of the fastest-growing communities in Alberta, with an incredible population increase of 23 per cent within the past five years. Cochrane's priority is to manage the growth of needed services; the community's attitude toward tourism is contextualized within its focus on quality of life, art, culture and recreation services.

Conversely, between 2016 and 2021, Sundre's population dropped from 2,800 to 2,500. The Town of Sundre has eliminated its municipal planning commission to create a streamlined approach to spurring economic development and is embracing tourism as a key opportunity to sustain and build up its community.

45,478

POPULATION

2,440

INDIGENOUS POPULATION

45%

POPULATION GROWTH
OVER PAST 10 YEARS

10.4%

UNEMPLOYMENT RATE

\$114,557

MEDIAN FAMILY INCOME

(Regional Dashboard, 2023)

ECONOMIC PROFILE

Core sectors within this zone include agriculture, manufacturing, oil and gas, and forestry. While tourism is also prominent in some communities, for the most part it does take a back seat to other sectors on which the communities are more dependent. While the town of Rocky Mountain House is currently heavily dependent on the oil and gas and forestry industries, it sees the opportunity to position the community as more of a basecamp for nature-based tourism. Residents of the town of Cochrane are largely employed in health care and social assistance; retail trade; construction; and professional, scientific and technical services. The town of Sundre is proactively attempting to diversify its economy, which (like Rocky Mountain House) is currently centered on forestry and oil and gas, to include health and education; tourism and retail; and cannabis production.

1,951

BUSINESSES

96.6%

SMALL BUSINESSES

\$448.2M

MAJOR PROJECTS

(Source: Alberta Regional Dashboard, 2023, Town of Cochrane 2023, Town of Sundre 2023)

ACCESS

The Cochrane/Sundre/Rocky Mountain House TDZ stretches from Cochrane to Rocky Mountain House and from Highway 22 to the edge of the Rockies. Albertans access the zone primarily off Highway 2, rather than traveling north-south on Highway 22. While the zone's main highways are well maintained year-round, road surfaces change from asphalt to gravel as visitors head west of Highway 22. Notable improvements to zone highways have started (with the construction of the Highway 22 and 1A interchange near Cochrane now officially underway) and will improve traffic flow and safety for residents and travellers.

The proximity of Calgary International Airport provides opportunities for international visitors to make this TDZ a direct destination or a final stopping-off point before they head home.

POLICY AND PLANNING CONSIDERATIONS

A number of policy and planning documents were analyzed to better understand the regulatory environment of the Cochrane/Sundre/Rocky Mountain House TDZ as it relates to tourism development. Key considerations include:

- Within this zone there are a number of different land bases (including public lands, parks and protected areas) managed by the Government of Alberta.
- Because of the zone's proximity to Calgary, its public lands are popular destinations for Albertans seeking unmanaged camping opportunities.
- The South Saskatchewan Regional Plan (SSRP), Red Deer Regional Plan (RDRP) and North Saskatchewan Regional Plan (NSRP) are, or will be, relevant regional planning frameworks of reference. SSRP identifies nature-based tourism as a priority. The other two plans are under development or not yet started.
- The Town of Cochrane is included in the Calgary Metropolitan Region Growth Plan (2021), which names tourism as a driving industry that is expected to lead employment growth in the medium term (six-10 years). The plan also notes that municipal development plans should consider identifying opportunities for agritourism.
- There are a number of inter-municipal development plans between neighbouring municipalities, such as the municipal districts of Bighorn/Rockyview County and Mountainview County/Sundre, that help to minimize land use and development conflicts, guide future land use and development and provide opportunities for collaboration.

DESTINATION ECOSYSTEM

Destination Marketing/Management Organizations (DMOs)

The Cochrane Tourism Association and the David Thompson Regional Tourism Group are two key DMOs within the Cochrane/Sundre/Rocky Mountain House TDZ. Due to their current mandates and funding sources, they do not frequently collaborate, and the large distance between the two makes it challenging to see alignment, opportunities for cooperation and relevance of potential joint endeavours.

The Cochrane Tourism Association (also known as Cochrane Tourism) works collaboratively with local businesses, attractions and stakeholders to develop and implement tourism strategies that highlight Cochrane's unique offerings. As a non-profit association funded by the Town of Cochrane, its primary goal is to enhance the visitor experience and contribute to the economic growth of the community. Cochrane Tourism partners with local operators through integrated campaigns and its online trip planner and in-destination app, as well as coordinates a Tourism Product Mentorship Program to help tourism-related entrepreneurs expand their businesses.

The David Thompson Regional Tourism Group, led and funded by Clearwater County, is dedicated to promoting tourism and showcasing the region's attractions and experiences associated with David Thompson, the renowned explorer and mapmaker. More specifically, the association focuses on highlighting the natural, cultural, and historical significance of the areas that Thompson traversed during his explorations in western Canada. This group is very focused on the activities that take place along Highway 11, also known as the David Thompson Corridor.

Economic Development Organizations

Economic development across this TDZ is enabled by municipalities including Clearwater County, Mountain View County, Rocky View County, the Municipal District of Bighorn, and the communities of Rocky Mountain House, Sundre and Cochrane.

Clearwater County's economic development strategy features four areas of focus: fostering a culture of growth, preparing for business growth, preparing for people growth, and promoting opportunities. The County sees tourism as one of four key area industries (along with oil and gas, agriculture and forestry) and leads the David Thompson Tourism Group.

Rockyview County has set out guidelines for growth and development over the next 20 years and through the establishment of its "Growth Concept," identified specific areas of the county for development. Tourism is encompassed under the principle of economic diversification as part of the

County's mandate to create a place where residents, businesses and tourists from around the globe find a thriving economy. Rockyview County's economic development offices support tourism businesses as they establish themselves in Rockyview County.

Economic development activities for Cochrane are led by the Town of Cochrane's business development team. Because Cochrane is one of the fastest-growing communities in Alberta, the Town is focused on managing growth. Its key objective is to improve Cochrane's business environment, increase Cochrane's economic diversity and maintain Cochrane's quality of place. Key strategies include promoting Cochrane as a "tech-incubator," enhancing the downtown and streamlining planning and development processes. Tourism development is positioned in the context of quality of life, art, culture, and recreation; tourism activities are largely driven by the DMO.

VISITATION

According to Travel Alberta's anonymized mobile data, in 2019, 97 per cent of visitors to this zone were from within Canada, while two per cent of visitors hailed from the US and very few arrived from other countries. Albertans make up approximately 90.5 per cent of Canadian visitors to this zone, while BC residents make up just over three per cent and Saskatchewan residents make up just over one per cent.

AB

VISITOR ORIGIN

Visitation to the Cochrane/Sundre/Rocky Mountain House TDZ is 97 per cent domestic, with the majority of travellers coming to the area from other parts of the province including Calgary (29 per cent), Rocky Mountain House (16.5 per cent), Clearwater County (10.1 per cent), and Airdrie (3.1 per cent).

36%

REPEAT VISITORS

Thirty-six per cent of visitors to the Cochrane/Sundre/Rocky Mountain House zone visit two or more times per year.

35 hours

AVERAGE LENGTH OF STAY

The average length of stay in this zone is approximately 35 hours. On average, Alberta visitors stay 35 hours and international visitors stay 27.6 hours.

Note: Percentages represent the devices detected in the destination for the identified period. They do not represent total visitation and may be impacted by differing traveller technology or a lack of cell coverage.

(Source: Near Mobile Data, 2019)

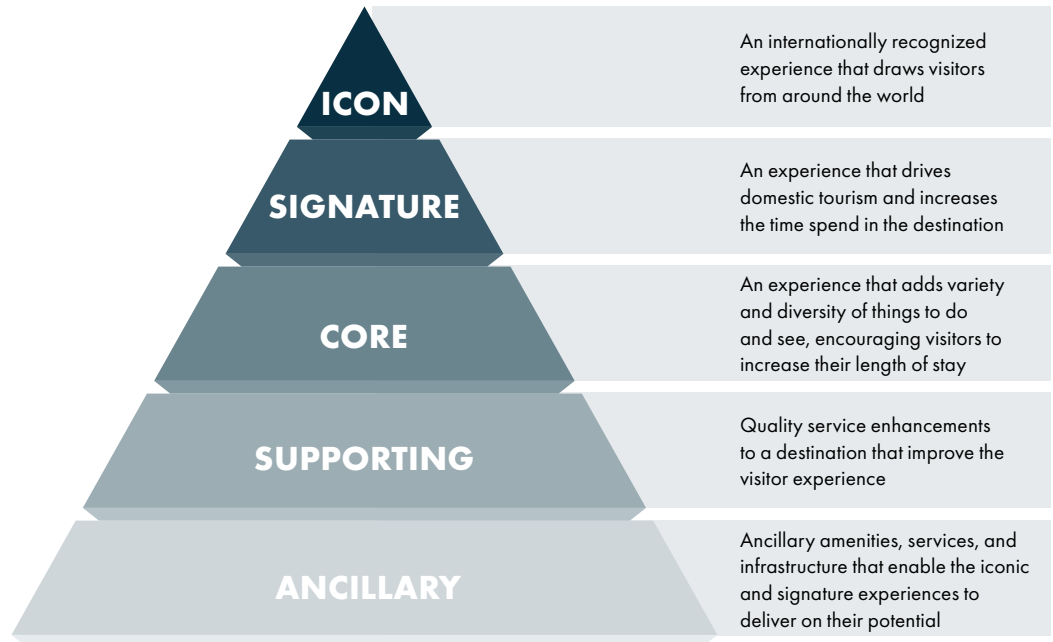
05 DESTINATION ANALYSIS



Painted Warriors, South of Sundre
Indigenous Tourism Alberta / Roam Creative

SUPPLY AND DEMAND ANALYSIS

In order to fulfill the tourism potential of this area, it is imperative to understand its tourism products and experience and accommodation mix, and the role both play within the development zone. Moving forward, this understanding will guide targeted investment toward the right products and places.



(Adapted from Failte Ireland)

The majority of the products in the Cochrane/Sundre/Rocky Mountain House TDZ are considered core products that add variety to the tourism experience and encourage visitors to spend a bit longer than they otherwise would have. There is a need for additional supporting products and amenities, such as accommodations and restaurants, to aid future growth and facilitate access to the signature products that already exist in the zone. Filling this gap in product types will be a priority within the zone moving forward.

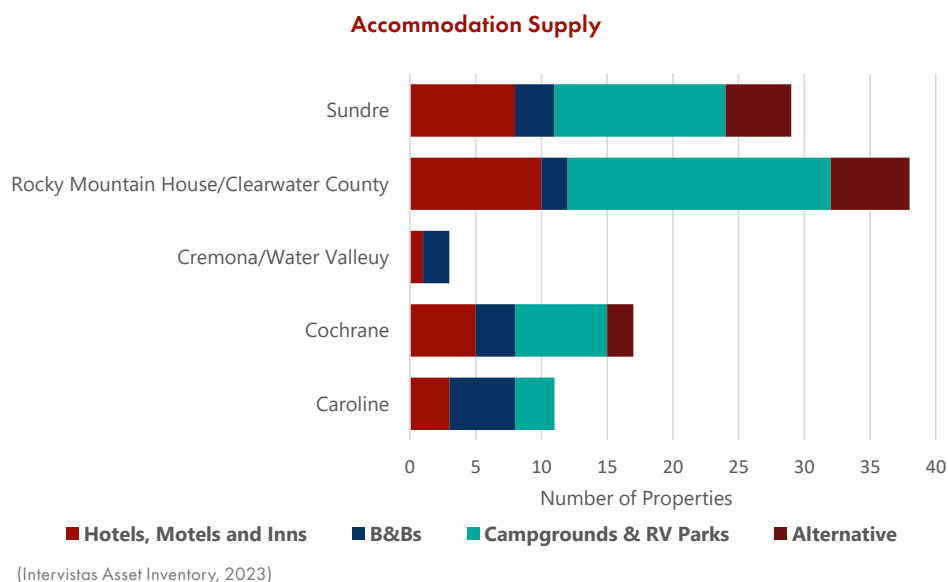


Historic Downtown Cochrane

Supply: Accommodation Mix

The accommodation inventory in the Cochrane/Sundre/Rocky Mountain House zone is generally made up of regional brand and economy hotels, with the exception of the Prairie Creek Inn (Rocky Mountain House) and The Crossing at Ghost River (Cochrane area), both of which are listed as Charming Inns of Alberta and offer guests an elevated experience. There is a significant number of managed campgrounds and RV resorts, and public use camping areas.

Most of the zone's accommodations are concentrated in the communities of Rocky Mountain House, Sundre and Cochrane, and serve industrial service workers. An increase in accommodations that target leisure travellers will be key in helping increase overnight stays and the overall appeal of the region. In order to attract increased international revenue, the development of glamping options and hotels in the upper-mid to upper scale should be given priority. Currently, one of the greatest impediments to visitor expenditure growth is the lack of export-ready fixed-roof accommodations. Stakeholders identified the acceleration of high-value "experience-based accommodation" as a key investment opportunity.



Supply: Products and Experiences

An asset inventory conducted within the Cochrane/Sundre/Rocky Mountain House zone identified approximately 350 key assets, which include tourism-related products and experiences, each one unique to its community and supported by basic amenities and services. This TDZ has an assortment of outdoor nature-based assets, including provincial parks, provincial recreation areas, campgrounds and trails. Highly unique tourism assets include Rocky Mountain House National Historic Site, the zone's three major river systems and a variety of Indigenous experiences including unique accommodations and outdoor adventures.

The majority of the zone's assets are fit for a local or regional visitor but fall just short of what an international visitor might expect — especially when it comes to elevated accommodations.

Local tourism businesses and operators include:

- Prairie Creek Inn
- Yamnuska Wolfdog Sanctuary
- The Crossing at Ghost River
- Schott's Lake Resort
- Hunter Valley Adventures
- Mahikan Trails
- Painted Warriors Ranch
- Fallen Timber Meadery
- Food Bike Tours
- Kelsey's Caravan Adventures
- Saddle Peak Trail Rides
- Mukwah Rafting
- Sunset Guiding and Outfitters
- Panther River Adventures
- JKL Trail Rides
- Wild Horse Camp

Provincial and national parks and historic sites include:

- Rocky Mountain House National Historic Site
- Public Land Recreation Areas (PLRAs)
 - Fallen Timer
 - Cartier Creek
 - Deer Creek
 - Red Deer Creek
 - South Ghost
 - Waiparous Creek
 - Dromer/Sheep

According to Travel Alberta's anonymized mobile data (2019), the most-visited tourism destinations in the Cochrane/Sundre/Rocky Mountain House zone include:

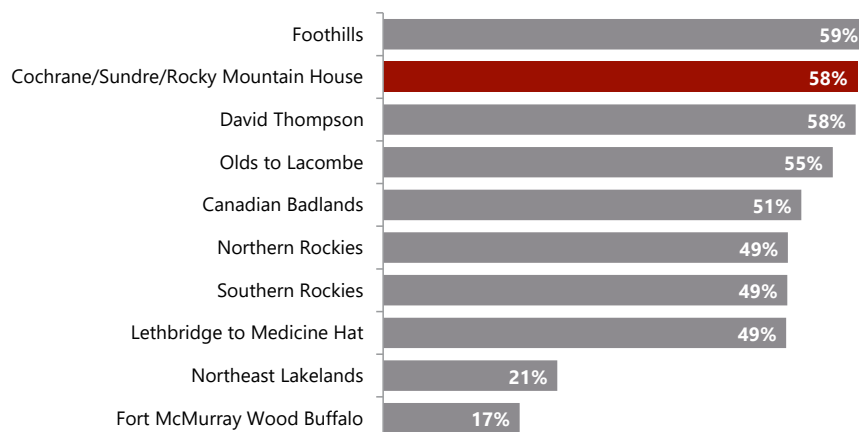
- Cochrane Rockyview Hotel
- Half Hitch Brewery
- Sundre Golf Course
- MacKay's Ice Cream

Demand: Amongst Albertans

As part of the perception research conducted by Travel Alberta in November 2022, over 1,000 Albertans were surveyed in order to better understand traveler perception of each of the 10 TDZs. This research indicated that:

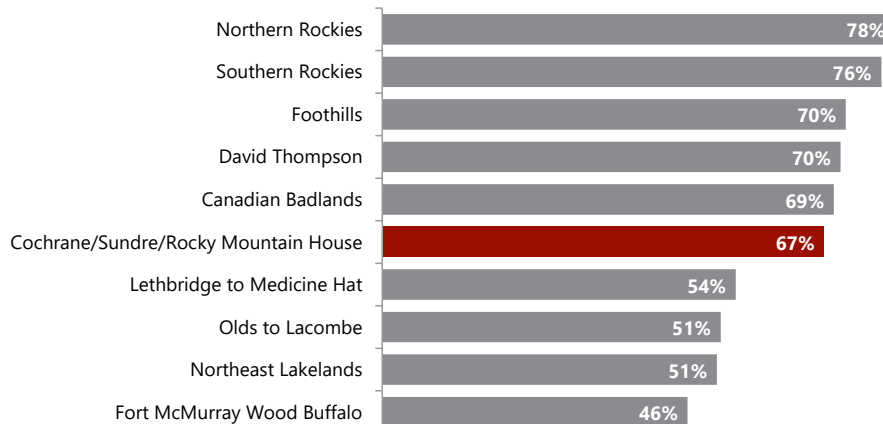
- The Cochrane/Sundre/Rocky Mountain House TDZ is familiar to 58 per cent of Albertans, second only to the Foothills TDZ.
- While it is evident Albertans have a positive impression of the zone, just under half of respondents are likely to travel there for a leisure trip in the next 12 months.
- Albertans have particularly positive impressions of the zone's mountains, lakes, beautiful scenery, wildlife viewing, hiking, kayaking and canoeing, camping and road-tripping.

Familiarity with Destination (Per cent familiar with each TDZ)

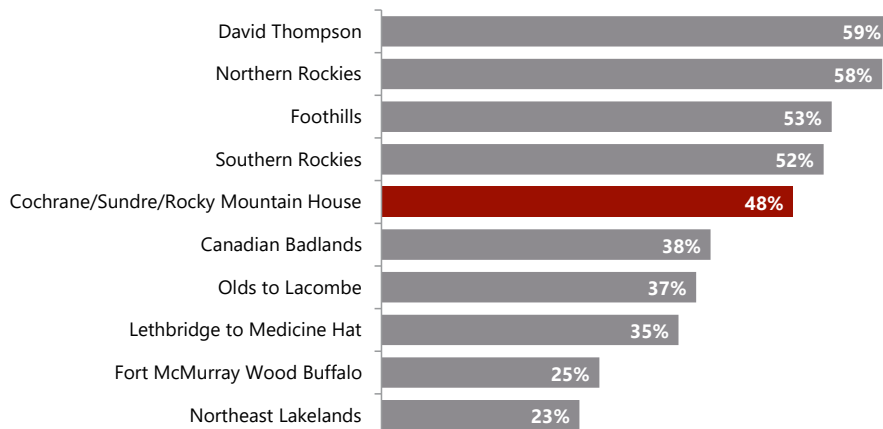


The Crossing at Ghost River, Cochrane

Overall Impression of Destination (Per cent with positive overall impression of each TDZ)

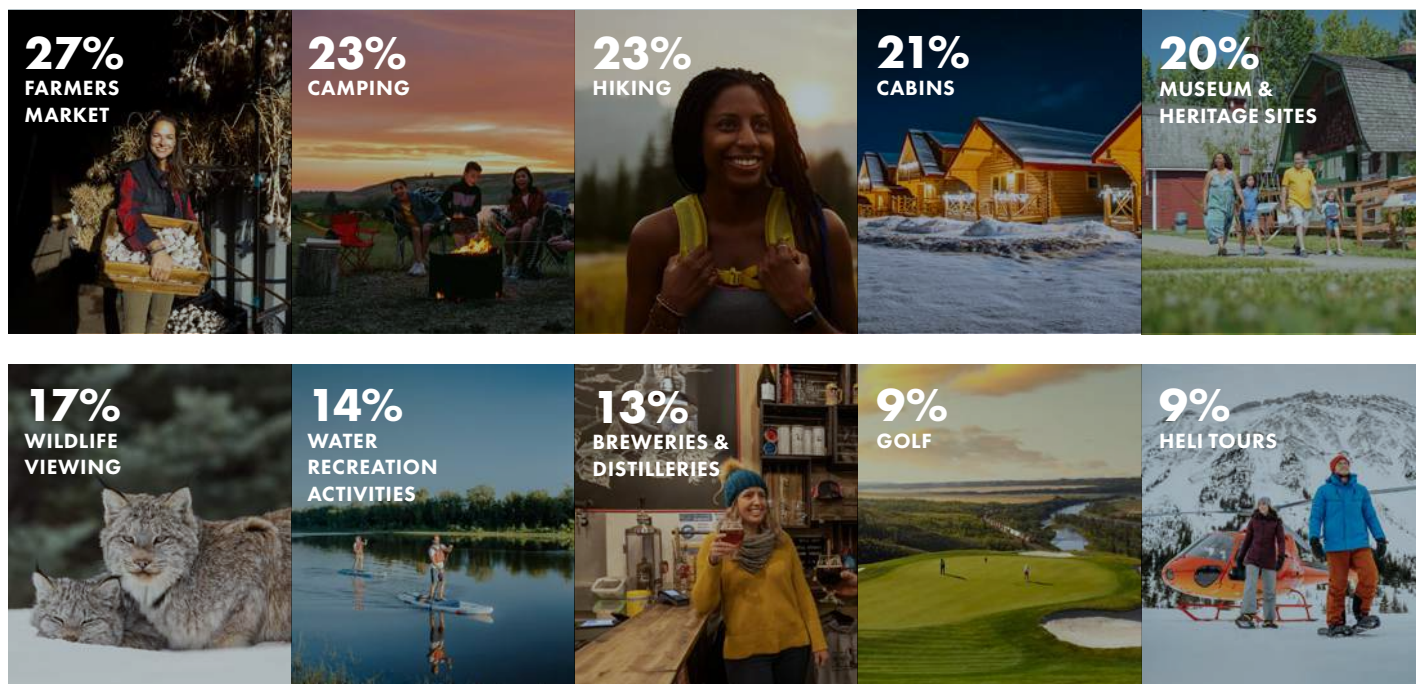


Likelihood to Visit Destination (Per cent likely to travel to each TDZ)

67%MOST LIKELY TO VISIT
DURING PEAK SEASON**73%**LIKELY TO ONLY STAY
BETWEEN ONE AND TWO NIGHTS

Activities Albertans are most likely to enjoy in the Cochrane/Sundre/Rocky Mountain House TDZ

Visiting farmers' markets and hiking top the list of activities Albertans are likely to enjoy during a trip to this TDZ



(Source: Assessing Perceptions of Alberta's Tourism Development Zones, Twenty31, 2023)

Demand: International Travellers

Top trip anchors (which are those activities a visitor would centre their trips around) and supporting activities identified by recent market demand studies align well with the existing tourism products, experiences and natural attractions in the Cochrane/Sundre/Rocky Mountain House TDZ.

In 2020, wolf watching, wildlife viewing and wildlife sanctuaries were among trending experiences for US visitors. This zone offers these experiences.

Key trip anchors of international and US visitors represented in the Cochrane/Sundre/Rocky Mountain House zone include:

- Viewing wildlife
- Hiking or walking in nature
- Natural attractions (like mountains and waterfalls)
- Historical/archaeological/world heritage sites
- Nature parks

(Global Tourism Watch, 2021)

Demand: Alberta's Target Travellers

Travel Alberta has identified "Curious Adventurers" and "Hotspot Hunters" as the high-value travellers likely to spend more per visit, yield the highest return on investment, and contribute the most to the province's economic growth. Tourism businesses, communities and associations can attract these valuable visitors by tailoring products and experiences to their unique travel styles.

The Cochrane/Sundre/Rocky Mountain House TDZ already provides a broad range of opportunities to attract Curious Adventurers. With additional investment in product and experience development, the zone could also start attracting Hotspot Hunters.



Wildhorse Ranch, Rocky Mountain House
Indigenous Tourism Alberta / Roam Creative

For Curious Adventurers, travel is about getting a different perspective on the world. From guided white-water rafting to kayaking, fishing and horseback riding, there are abundant opportunities for adventure and exploration in the Cochrane/Sundre/Rocky Mountain House TDZ. This zone invites Curious Adventurers to immerse themselves in the places they visit and experience organic moments, from spotting wild horses to Indigenous cultural experiences; from cups of warm berry tea to gulps of crisp winter air. Residents' independent spirits, welcoming nature, and proud western heritage encourage visitors to leave time for unplanned encounters with ranchers, farmers, artists, chefs, and storytellers.



Painted Warriors, South of Sundre
Indigenous Tourism Alberta / Roam Creative

For Hotspot Hunters, travel is about achievement and accomplishments. The zone also has the potential to become a one-of-a-kind destination that caters to Hotspot Hunters' desire to visit the top attractions, take part in unique experiences and connect with local experts. Investments in high-value accommodations, river tourism (trip generators), no-net-impact accommodations (eco-hotels, glamping), and supplementary products and experiences in the primary basecamps (Sundre, Cochrane and Rocky Mountain House) would help to fill Hotspot Hunters' itineraries with as many stories and memories as possible.

Trends impacting tourism

As destination organizations and businesses at all levels look to adapt and thrive, it will be important they stay attuned to emerging trends that are driving the tourism industry forward. These trends, identified by Twenty31 in their 2022 Tourism Trends report, will impact supply and demand and shape the future of tourism over the short- and long-term.

TREND:**Regenerative travel****DESCRIPTION:**

Regenerative travel will help make tourism a pillar for sustainable economic development for destinations. Approximately 83 per cent of global travellers will make sustainable travel a priority in the future, while 66 per cent want their travel spending to directly benefit local communities.

KEY TAKEAWAY FOR TDZ

Residents are enthusiastic about sharing the zone with visitors and embrace a holistic approach to managing the growth of tourism, ensuring the local social fabric is well served by new initiatives and developments. For example, residents are open to changing the parameters around land use in the western part of the zone to allow for regenerative river corridor development and the creation of world class eco-tourism assets that celebrate Indigenous culture, harness renewable energy, engage guests in regeneration projects, foster stewardship of the natural world and rely on sustainable supply chains.

Exotic destinations attract young travellers

Younger travellers are not looking exclusively for sun and beach destinations; they also want immersive adventure, often involving high doses of adrenaline and off-the-beaten-path destinations.

For visitors searching for “Canada’s wild side,” this zone offers novel opportunities to connect with brave, bold and refreshingly down-to-earth locals, thereby initiating unexpected, distinctively Canadian adventures. Targeted investments could enable the zone to develop a portfolio of liberating, only-in-Alberta experiences.

Single destination, longer stays

The complexity of arranging a trip will result in travellers booking fewer trips but increasing the length of their stay in a single country. “Travel less, travel better” will determine booking behaviour over the next few years.

Over the mid- to long-term, this TDZ has the opportunity to develop a series of high-demand nature-based experiences that link the zone’s appeal to that of the Rockies and provide compelling reasons for visitors to come — and stay awhile.

(Source: Twenty31, 2022)

RESIDENT
SENTIMENT

The success of developing tourism across Alberta’s TDZs hinges on tourism’s impact on the quality of life for local residents. Quite simply, if it’s not good for residents, it’s not good for visitors. Travel Alberta has been tracking resident sentiment across the province for the past year, and as part of this initiative, we assessed resident sentiment at a TDZ level, as highlighted below.

Generally, residents in the Cochrane/Sundre/Rocky Mountain House TDZ are highly connected to their communities, feel there is a lot to see and do in the zone, and want to tell others about it. However, they presently don’t recognize how a strong tourism industry could translate into positive benefits for their community. Instead, many residents are concerned with the possibilities that

more visitation might lead to traffic congestion and parking problems and that too many visitors may put pressure on local amenities.

Educating residents on the value of tourism and ensuring their concerns around destination management are being taken into consideration will be key to success in this zone.

Residents across the TDZ acknowledge the strong potential for the development of natural sites and tourist experiences to enhance their own quality of life.

Highlights: Resident Sentiment

QUESTIONS	TOTAL ALBERTA RESIDENTS	COCHRANE, SUNDRE, RMH RESIDENTS
How important is tourism to your community?	70%	63%
I would welcome more visitors to my community	62%	65%
A strong tourism industry improved my quality of life	61%	54%
The attractions, events, and things to do here are an important part of making my community a vibrant place	83%	79%
This is a vibrant community and area – there is lots to do	70%	79%
My community and area offers experiences I want to tell others about	65%	71%

(Source: Stone Olafson, 2023)

SWOT ANALYSIS

Using findings from primary and secondary research and extensive stakeholder engagement, the consulting team conducted a strengths, weaknesses, opportunities and threats (SWOT) analysis to evaluate this TDZ. The analysis takes into consideration both the current and potential future drivers that will influence tourism within the zone.

Strengths

- A broad base of nature-based adventure activities that resonate with domestic and international travellers
- One of the fastest-growing communities in Alberta
- Strong demand for RV and camping facilities
- The zone's Western heritage, which is apparent in existing operators, residents' lifestyles and the highest density of wild horses in Canada
- Established, year-round Indigenous operators providing both products and experiences

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Weaknesses

- Significant amount of unmanaged Crown lands with conflicting land uses, which presently impedes the growth of export-ready, nature-based tourism products and experiences
- Agriculture (a priority sector) possibly inhibiting tourism development outside of town boundaries in some rural counties
- Little collaboration among communities in the zone
- Individual communities facing different realities and differing priorities
- Lack of fixed-roof accommodations and tourism products and experiences
- Lack of facilities for meetings and conferences
- Lack of transportation infrastructure outside of the main highway network
- Some local businesses not seeing themselves as part of the tourism ecosystem
- Limited tourism-related infrastructure in the Municipal District of Bighorn and the southern section of Clearwater County (for example, roads within the area are not paved and or maintained; trailheads lack parking, washrooms, garbage facilities, picnic areas; camping is under-managed)

Opportunities

- Follow up on the Municipal District of Bighorn's direction to encompass destination development opportunities in its new Municipal Development Plan
- Increase public and private investment in new outdoor recreation and nature-based infrastructure and assets on Crown lands
- Close the gaps between tourism-related infrastructure and assets (high-value accommodations, highways, trails, river access/egress, etc.)
- Capture visiting friends and relatives (VFR) market in Cochrane, and capitalize on the zone's proximity to Calgary to build on domestic visitor base
- Work with key communities through a cluster-based approach to identify high-value investment opportunities aligned with the demand for nature-based tourism products and experiences

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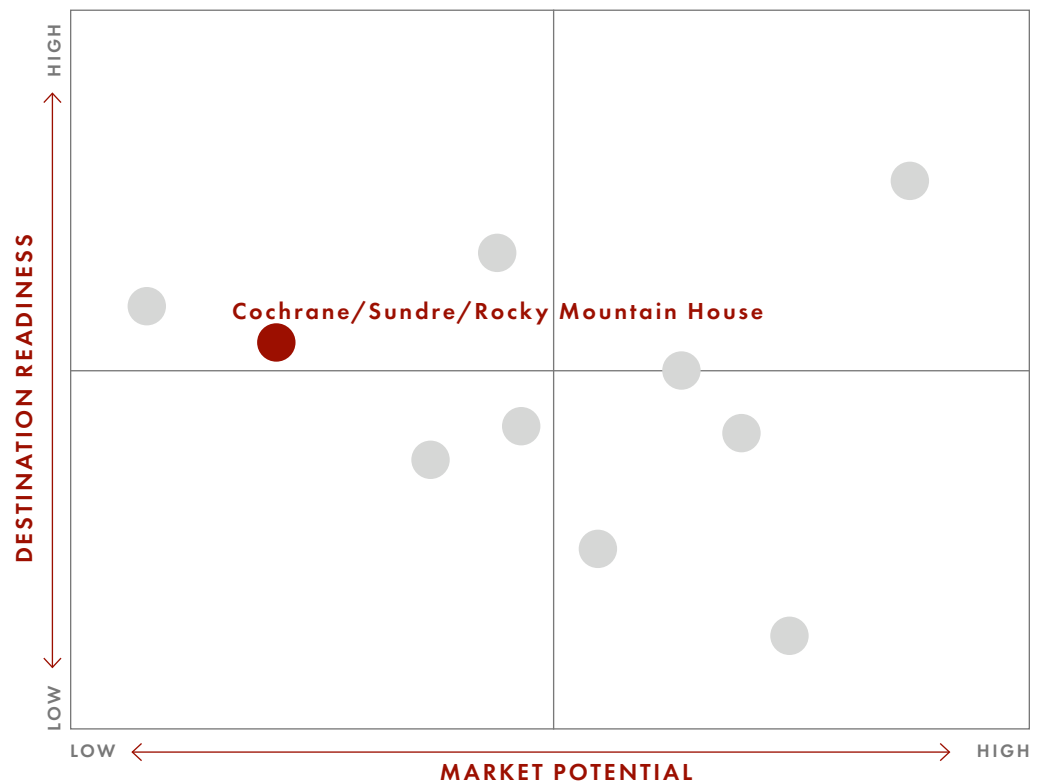
Threats

- Limited understanding for the importance of the visitor economy and its contribution to the residents' quality of life and business success
- Tourism is not currently a high priority for some community decision-makers and therefore may not be given the same consideration as other sectors in both planning and in development
- Lack of labour available to work in the tourism sector and a declining employment rate
- Increasing housing costs in Cochrane due to population pressure and expanding transportation
- Currently a lack of collaboration on tourism initiatives amongst communities across the zone
- Continuing population decline in rural municipalities

DESTINATION MATURITY AND READINESS

The Cochrane/Sundre/Rocky Mountain House TDZ has potential (as shown in red on the matrix) to become an enabling environment for tourism with an improved mix of tourism products and experiences. To determine effective resource allocation moving into the DDP phase, Travel Alberta assessed market potential and community readiness in destinations within the Cochrane/Sundre/Rocky Mountain House zone. This initial assessment will be further validated with input from communities across the TDZ. Key issues pertaining to this zone include:

- Lack of formal commitment to destination management practices and collaboration across the zone
- Lack of a critical mass of export-ready accommodation and year-round products and experiences
- Varying views on and levels of interest in tourism and tourism development



The grey dots represent the position of the Cochrane/Sundre/Rocky Mountain House TDZ relative to the ten other TDZs across the province.

05 VISION FOR THE FUTURE



Rocky Mountain House National Historic Site

“The must-see place in Alberta where respectful travellers with a sense of adventure come to connect to abundant natural beauty, unique places and welcoming ways of living.”

– TDZ Steering Committee

DESTINATION 2035

Through the stakeholder engagement sessions, three desirable attributes emerged as signature elements to be included in the zone’s destination vision:

- **Hospitality:** hosts are excited to share their love for home and land with respectful guests
- **Quiet outdoors:** visitors seeking adventure in stunning natural areas with enough space for everyone
- **Culture:** a sense of place that embodies Indigenous ways of living, western heritage and a small-town feel

With these considerations in mind, the following positioning was developed for the Cochrane/Sundre/Rocky Mountain House zone.

The Cochrane/Sundre/Rocky Mountain House TDZ stretches west, as wooded foothills and rushing rivers give way to breathtaking prairies and clear mountain views. The zone draws in visitors hoping to foster a deeper connection to the land; learn the cultural and historical significance of the diverse landscapes; and enjoy year-round outdoor activities including river tours, biking, snowshoeing, snowmobiling, horseback riding and camping. Visitors are invited to traverse the countryside, getting a taste of the zone’s storied western heritage, and exploring the hidden gems and local flavours waiting to be discovered along the Cowboy Trail.

To balance tourism growth within the zone and ensure a community-first strategy for achieving this vision, a cluster-based approach is being proposed for the Cochrane/Sundre/Rocky Mountain House

TDZ. By 2035, the following three clusters hold potential to be further developed, and manageable growth in visitor revenues will be achieved through:

- **Cochrane:** services centre, river park/corridor, special events, art/photography, outdoor adventures, wolfdog sanctuary, farmers’ markets
- **Sundre:** hiking, snowshoeing, camping, whitewater rafting, kayaking, canoeing, golfing, rodeos, farmers’ markets, natural attractions
- **Municipal District of Bighorn:** Outdoor adventures, natural attractions, high-value eco-accommodation, iconic road journeys, back country experiences

These clusters will not only attract a niche visitor, but will meet the expectations of Albertans and Canadians overall and have the potential to be attractive to US visitors.

Rocky Mountain House will continue to benefit from the close alignment that exists with its partners as an addition to the David Thompson TDZ.

By 2035, the Cochrane/Sundre/Rocky Mountain House TDZ will be a year-round, complementary “prairies to peaks” journey that allows visitors to experience the varied landscapes of the province from Calgary to Banff National Park. More sustainable and financially stable businesses will offer tourism products and experiences and accommodations in demand by target visitors from Alberta, Canada and around the world.

STRATEGIC INITIATIVES

In support of tourism development within the TDZ, multiple strategic initiatives were identified by local stakeholders and communities. This included:

01. Advance tourism leadership at a local level and build synergy among the tourism industry, government and other sectors of the economy
02. Increase the overall accommodations offering, with a focus on boutique hotels, guest ranches and other glamping accommodations
03. Develop a critical mass of products and experiences to expand year-round overnight visitation domestically and internationally, as well as generate incremental visitor spending through longer stays
04. Explore opportunities to improve Crown land use in the area
05. Address challenges around DMO governance and sustainability
06. Improve transportation infrastructure on key highways
07. Maintain and nurture resident sentiment in support of tourism and its positive impact on quality of life for residents and economic diversification
08. Position tourism as a driver of economic development with high-value tourism-related investments



Northern lights, Cochrane
Claudio Frimmel

OUTCOMES

Successful implementation of these strategic initiatives will enable the development of products, accommodations and robust multi-day itineraries that increase the length of time visitors stay and how much they spend throughout the TDZ. Specifically, the desired outcomes of these initiatives include:

Improved seasonality of visitation

Businesses will operate predictably, visitors will have positive experiences, and community members will appreciate the value visitors bring to their communities.

Public and private sector investment

The identification of specific gaps in products, experiences and infrastructure will have created awareness of community needs and market demand, spurring private and public sector investment.

Capacity and capability

Tourism companies, entrepreneurs and destination organizations across the province will be well-equipped to expand, establish and support their businesses, creating jobs and more vibrant communities.

Awareness and understanding of benefits

Tourism growth will result in a more diversified economy, reduce dependency on other sectors, improve quality of life for residents and legitimize the benefits of tourism in this TDZ.

Reconciliation and cultural awareness

If the results of the ongoing Indigenous engagement in the zone show that local Indigenous communities are in favour of tourism development, Travel Alberta will collaborate with Indigenous Tourism Alberta and Indigenous tourism operators to foster growth in the sector. Community-led tourism will offer opportunities for economic development, the sharing of cultures and the development of infrastructure that will benefit residents.

Cooperation among communities

Communities will bring their unique perspectives and assets to the table to develop strong tourism products and experiences that attract visitors to the zone and encourage them to stay longer.



06 CONCLUSION AND NEXT STEPS

While this zone contains sites and experiences that align with the interests of international travelers, the bulk of current visitation is highly domestic, with most visitors coming from within Alberta. Over half of Albertans are already aware of the Cochrane/Sundre/Rocky Mountain House TDZ, think of it favourably and are likely to travel there.

In moving forward, it is recommended that the boundaries of this Zone be adjusted to provide the opportunity for Rocky Mountain House to continue its work unimpeded with David Thompson Tourism Development Zone partners as a member of the David Thompson TDZ. Conversations between Rocky Mountain House and the Cochrane Sundre Tourism Development Zone will continue on the establishment of an iconic visitor journey that links both Zones to popular Rockies destinations.

While residents within this zone are proud of their communities, they are skeptical about the potential benefits of developing their tourism assets and will need to be assured that development can be achieved in a community-centric and sustainable way.

To achieve its 2035 tourism goals, the Cochrane/Sundre/Rocky Mountain House TDZ must attract new public and private sector investment to enhance some of its current high-potential tourism assets and develop new ones. Stakeholders and Travel Alberta must identify the tourism assets within the TDZ that have the highest potential (over the short-, medium-, and longer-term) to successfully reposition this zone as an essential part of the Rockies tourism experience.

Success in attracting investors will be improved by the area's ability to address challenges within the zone. These challenges include, but are not limited to: limited upscale and glamping accommodation options, limited products and experiences (including those that are market-ready), lack of cooperation and vision-sharing between communities and other stakeholders, and residents' ambivalence about developing their local tourism assets. These tourism-specific challenges are compounded by more systemic challenges including a shortage of labour and the current management of Crown lands.

Together with outside investors, the local stakeholders, DMOs, and all levels of government must prioritize: cooperation with each other (both within and between municipalities); development and promotion of under-utilized natural, cultural, historical and infrastructural assets (especially including the zone's three river systems and western heritage-related assets); and investment in sustainable and regenerative tourism products and amenities that will better serve Albertan, Canadian and international leisure visitors to the Cochrane/Sundre/Rocky Mountain House TDZ.

Successful implementation of the strategic initiatives found in this report will both realize the zone's existing potential and create new opportunities for regional growth and prosperity. As we move into the next phase of this project, we will build on these findings to ensure the foundations for a popular and profitable destination are in place.



Mukwah Rafting, Panther River, Sundre



**CONTACT YOUR DESTINATION
DEVELOPMENT MANAGER FOR SUPPORT**

Cameron Spence
Foothills & Canadian Rockies
403-612-8397
cameron.spence@travelalberta.com

